

**Oracle® Retail Merchandise Financial Planning
Cloud Service and Oracle® Retail Merchandise
Financial Planning Enterprise Edition Cloud
Service**

Administration Guide

Release 18.0

F10753-05

May 2020

Oracle Retail Merchandise Financial Planning Cloud Service and Oracle Retail Merchandise Financial Planning Enterprise Edition Cloud Service Administration Guide, Release 18.0

F10753-05

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Preface

This document describes the administration tasks for Oracle Retail Merchandise Financial Planning Cloud Service and Oracle Retail Merchandise Financial Planning Enterprise Edition Cloud Service.

Audience

This document is intended for administrators.

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Related Documents

For more information, see the following documents in the Oracle Retail Merchandise Financial Planning Cloud Service Release 18.0 documentation set:

- *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*
- *Oracle Retail Merchandise Financial Planning Cloud Service Release Notes*
- *Oracle Retail Merchandise Financial Planning Cloud Service Starter Kit Guide*
- *Oracle Retail Merchandise Financial Planning Cost Cloud Service User Guide*
- *Oracle Retail Merchandise Financial Planning Retail Cloud Service User Guide*
- Oracle Retail Merchandise Financial Planning Enterprise Edition Cloud Service documentation set
- Oracle Retail Predictive Application Server Cloud Edition documentation set

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Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

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An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is also available on the following Web site:

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

(Data Model documents are not available through Oracle Technology Network. You can obtain these documents through My Oracle Support.)

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, 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.

Administration Process

The intent of this document is to guide a Merchandise Financial Planning Cloud Service (MFP CS) Administrator to perform the recurring administrative activities for the MFP CS application. This document outlines all administration activities required to support a live MFP CS application. In some cases, the detail will be explained in this document, and in other cases, the process will be covered here and details will be explained in the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

The MFP CS Administrative activities can broadly be classified into two categories. This document follows these categories and provide details for the tasks within them.

Regular Activities:

- MFP Batch Task Administration
- Patch/Install Domain

Ad-hoc Activities:

- User And Role Maintenance
- Monitor Domain Performance

Regular Activities

Once a MFP CS solution is live, the Administrator is responsible for two key activities that occur on a regular basis. The first of these activities is managing the weekly/daily batch which loads and exports data required for the MFP CS users to create, manage, and share their merchandise financial plans. Internally, it also does the calculations for necessary data aggregation.

The MFP CS Admin task offers a broad range of options to the Administrator to configure the batch run and maintenance. This document also provides a concise view to the Administrator on troubleshooting when the batch fails or diagnosing rejected records, importing/exporting of data files, reading logs, and modifying the scheduled batch to work around system maintenance or patch periods. The Administrator can also decide to run the export of data exclusively without running a weekly/daily batch.

Patch uptake is another recurring task that an Administrator needs to be familiar with. This document walks through the process of taking a monthly patch and the specifics the Administrator needs to take care of.

Ad-hoc Activities

The Administrator generally comes across certain jobs on an as-needed basis. For example, the need occasionally arises to do the following:

- Add a new user who just joined the team/organization and needs to use the MFP CS application.
- Remove an existing user who has left the organization and needs to be removed from the MFP CS environment.
- Manage a user's access when the role changes within the organization.

This document describes the necessary actions to achieve this kind of request.

The Administrator can leverage the standard Online Administration Tools (OAT) tasks on an ad-hoc basis without scheduling the task daily or weekly. Ad-hoc administrative activities include properly managing the reclassification of product so that planners can continue their work without interruption, monitoring domain related information to maintain system performance, loading a hierarchy* from OAT, and so on, are several jobs the Administrator needs to perform intermittently.

*Currently, Hierarchy is also referred to as Dimension for the MFP CS application.

Oracle Support

It is requested that all retailers submit Oracle Retail Merchandise Financial Planning Cloud Service support requests through a single point-of-contact for each environment; the system administrator is usually designated to perform this role. For the maintenance of bulk user and roles, Oracle Support is a smart solution.

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

<https://support.oracle.com>

To learn more about how Oracle Support works, go through the following training at the My Oracle Support website:

- My Oracle Support (MOS) or Cloud Support Portal for New Users - A Getting Started Resource Center (Doc ID 1959163.1)
- How-to use My Oracle Support - Customer User Administrator (CUA) Role and Responsibilities (Doc ID 1544004.2)
- Oracle Support Accreditation - Series Index (Doc ID 1583898.1)

MFP Batch Task Administration

The Merchandising Financial Planning (MFP) Cloud Service batch task is a powerful tool provided to the Administrator to manage periodic load/export of Data/Hierarchy from the front end, eliminating the cumbersome effort of scheduling and running the batch from the back end domain server.

MFP Cloud Service uses the Oracle Retail Predictive Application Server Cloud Edition (RPASCE) Online Administration Tools to schedule RPASCE services to run batch on the Cloud. Administrative users can view the results of the scheduled services in the log on a dashboard through the RPASCE front end.

RPASCE Online Administration Tools support the scheduling of standard RPAS utilities and, in addition, scheduling application-specific services. For a detailed understanding of the Online Administration Tools, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

The following sections explain the application-specific administration tasks that are pre-configured for MFP Cloud Service.

Application-Specific Batch Tasks

The application-specific batch tasks are a set of tasks that help the Administrator to load/export a predefined set of data and hierarchies. These tasks are found in the Online Administration Tools as Configured Batch Tasks.

Each task in turn calls predefined batch services to do the required tasks. MFP Cloud Service uses the Enterprise Edition batch framework to define the batch process.

Some tasks require input data files or hierarchy files as input. These files must be uploaded before the tasks are scheduled. Some tasks export files out of the application. Those files are copied to the SFTP export location, and Administrators can download these exported files.

The SFTP file location is a space provided to the Administrator to load import files and access exported batch files. For more information, see "[Batch File Uploads/Downloads](#)."

Administrators can set up some additional batch specific measures, such as Enable RMF CS Integration, that control the batch process in the client UI in MFP Setup -> Manage Batch -> Manage Batch.

The following table shows the list of application-specific administration tasks that are pre-configured for MFP Cloud Service:

Configured Batch Tasks

Run Batch Measure Load Group

Run Batch Measure Export Group

Run Batch Calc Group

Run Batch Task Group

Clean up Task

Retrieve Batch Control Files

Upload Batch Control Files

Manage JSON files

Patch JSE Jars

Remove JSE Jar

Translation Tasks

Run Batch Measure Load Group

This task is used to load a predefined set of measures grouped as a measure set in the batch control file `batch_loadmeas_list.txt`. These set of measures can be loaded together. Actuals Data is a named set of load measures in the batch control file. If the Administrator decides to load the measure set for Actuals Data, the Administrator needs to load data for measures which includes measures such as Ty Sales Clr R and TY Sales Clr U. All required data files must be uploaded to the SFTP location before scheduling this task. For more information, see ["Batch File Uploads/Downloads."](#) If there is no file present to load a particular measure in that measure set, it will be logged as not found and skipped.

This process will only load the data into those measures and will not run any subsequent calculations. The Administrator may need to schedule the necessary Run Batch Calc Group task after scheduling this task in order to process the loaded data.

The Predefined Measure Load Options in MFP are listed below:

- Actuals Data (load_act) - To load all the measures containing actual data as needed such as Sales, Inventory, Receipt, Shrink, and so on.
- On Order Data (load_oo) - To load only On Order data files.
- Admin Data (load_adm) - To load planning administration level data such as VAT %, Currency Conversion Rates, Week Mapping, and so on.
- RMS Forecast (load_rms) - To load transformed RMF CS interface data files.
- Translation Files (load_tran) - To load all the translation files.

For details about the list of measure files that are loaded for different measure sets and information on the data file formats, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

With Enterprise Edition implementations, the Run Batch Measure Load group task can be configured to load different sets of measures by making changes to the batch control files. For information about changing the batch control files and how to upload them, see the *Oracle Retail Merchandise Financial Planning Enterprise Edition Cloud Service and Assortment & Item Planning Enterprise Edition Cloud Service Implementation Guide*.

Run Batch Measure Export Group

This task exports a predefined set of measure data into flat files. The predefined set of measures to be exported are defined in the batch control file `batch_exportmeas_list.txt`. This set of exported data can be used for integration with other applications. Typically, the data is exported to a database that creates a report or allows a query by users. The Administrator needs to schedule the Set Export Flags under the Run Batch Calc Group task to set the required export flags before scheduling this task. Exported files for this task are put into the SFTP Export location; the Administrator can download the files from this location. For more information, see ["Batch File Uploads/Downloads."](#)

The standard exports from MFP are available to the retailer to use by any downstream applications which needs MFP plan data. Default approved plan standard exports are included as part of the daily and weekly batch.

The predefined options for these tasks are listed below:

- Merch Plan - Current Plan (mpcp)
- Merch Plan - Original Plan (mpop)
- Merch Plan - Submitted Plan (mpwa)
- Merch Plan - Working Plan (mpwp)
- Merch Target - Target Plan (mttg)
- Merch Target - Working Plan (mtwp)
- Location Plan - Current Plan (lpcp)
- Location Plan - Original Plan (lpop)
- Location Plan - Working Plan (lpwp)
- Location Target - Target Plan (lttg)
- Location Target - Working Plan (ltwp)

For details about the different versions for export, the list of measures exported in each file, and the file name and format details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

With Enterprise Edition implementations, the Run Batch Measure Export group task can be configured to export new versions of data or remove a particular version from the list of measures exported by changing the batch control files. For information about changing the batch control files and how to upload them, see the *Oracle Retail Merchandise Financial Planning Enterprise Edition Cloud Service and Assortment & Item Planning Enterprise Edition Cloud Service Implementation Guide*.

Run Batch Calc Group

This task is used to run a predefined set of all batch rules (as batch calc sets) against the domain to do the necessary data aggregation that is defined in the batch control file `batch_calc_list.txt`.

With Enterprise Edition implementations, the Run Batch Calc group task can be configured to export new versions of data or remove a particular version from the list of measures exported by changing the batch control files. For information about changing the batch control files and how to upload them, see the *Oracle Retail Merchandise Financial Planning Enterprise Edition Cloud Service and Assortment & Item Planning Enterprise Edition Cloud Service Implementation Guide*.

The following predefined batch calculation sets are available in MFP:

- Weekly Batch Calc (batch_week)
- Generate Forecast (batch_fcst)
- Set Export Flags (exp_set)

Weekly Batch Calc (batch_week)

This batch calc set is used to run all required batch process calculations to do the necessary data aggregation and inventory roll operations after the weekly data load. It internally runs the batch rule groups Batch_GB, Batch_AggW and Batch_InvRoll.

This allows the users to see actualized data for the current elapsed week such as sales, markdowns, and receipts as well as inventory for both current and recalculated for future periods. This also allows users to see a sales forecast based on actuals that have been loaded and apply the trend to go forward weeks.

This process runs as part of a Weekly Batch. This task may be also scheduled if a retailer has data issues and needs to reload corrected actual data files in the middle of week and reprocess the week batch calculation.

Batch_GB sets the elapsed measures and runs domain calcs for the Location Target measures. Batch_AggW copies all loaded actuals into the WP and CP versions of the elapsed periods. Batch_InvRoll rolls forward the new EOP of the elapsed periods to the future BOP and EOP for both the WP and CP versions.

Generate Forecast (batch_fcst)

This batch calc set is used to generate forecast data used by MFP Cloud Service. It uses the embedded RDF procedures by calling the internal configuration rule groups Batch_Fcst_G and Batch_Fcst_L. These rule groups call the embedded RDF forecast procedure to calculate the forecast for future periods of all versions using loaded actual and approved plan data. It calculates both the in-season forecast and pre-season forecast for all versions. Only one version of the forecast is shown in the workbook, based on the workbook build for in-season or pre-season.

This process also runs as part of the regular weekly batch, but if the retailer wants to regenerate the forecast after loading corrected actuals in the middle of the week, then they can run this task.

Following is the list of forecast measures that are calculated by this process:

- Wp Fcst In Reg+Promo R
- Wp Fcst In Clr R
- Wp Fcst In Reg+Promo U
- Wp Fcst In Clr U
- Wp Fcst Pre Reg+Promo R
- Wp Fcst Pre Clr R
- Wp Fcst Pre Reg+Promo U
- Wp Fcst Pre Clr U

Set Export Flags (exp_set)

This batch calc set is used to set the necessary export flags for all exports used by MFP Cloud Service. The user can control the position exported for all versions by setting the administration measure advexportb Export Mask in the Manage Export view. If the Export Elapsed Periods flag is set to false (the default), it will not export elapsed

period data. This task sets export flags for each version of exports based on the Export Mask. For approved and submitted plans, the export flag is set based on the Export Mask and Approved or Submitted Info measure. For working plans, it is set based on the Export Mask and Seeded Info measures.

By default, daily and weekly batch runs these calculations before running an export. The Administrator needs to run this task only if they have changed the export settings and wants to create an on-demand plan data export.

Run Batch Task Group

This task is used to schedule a predefined set of batch tasks such as load measure, batch calc, and batch exports in a sequential order. The batch control file `batch_exec_list.txt` defines the steps in the specific order that will be executed during batch task execution. This task is used to schedule a typical daily or weekly MFP Cloud Service batch. If any task aborts, a log is created and the process terminates. This task has the option to restart from the last failed service rather than running all the completed services again.

Note: Typically, the Administrator must schedule this task within a time frame after a domain backup and when no users are logged into the domain. The Administrator must work with Oracle to find out the time of backups and any other jobs.

The following predefined batch sets are available:

- Daily Batch (`batch_daily`)
- Weekly Batch (`batch_weekly`)
- Transform RMS Files (`batch_rms_xform`)
- Transform RMS Warehouse Data (`batch_rms_wh`)
- Load Hierarchies (`load_hier`)
- Export All Approved Plans (`export_all`)
- Export All Working Plans (`export_wp`)
- Exports to Retail Insights (`export_ri`)
- Exports to Shared Services (`export_ss`)
- Post Build Batch (`postbuild`)

With Enterprise Edition implementations, the Run Batch Task Group task can be configured by making changes to the `batch_exec_list.txt` control file. For more details about the list of internal services this task can call and how to change the order of services to this task, see the *Oracle Retail Merchandise Financial Planning Enterprise Edition Cloud Service and Assortment & Item Planning Enterprise Edition Cloud Service Implementation Guide*.

Daily Batch (`batch_daily`)

This task is used to schedule a daily plan data export and load on-order files. A retailer may need on-order on a daily basis during an open-to-buy for example.

If a daily load or export is not needed, this step can be skipped as they are scheduled in the weekly load/export process. Steps in this process are also part of the Weekly Batch, so they do not have to schedule this during weekly batch.

Also, if the retailer does not need exports on a daily basis, they can skip scheduling this process.

This task runs the following set of activities in this order:

- Run Batch Calc: Set Export Flags
- Measure Export: Export All Plan Versions
- Measure Load: Load On Order and Process On Order
- Refresh Dashboard

Weekly Batch (batch_weekly)

This task is used to schedule a typical weekly MFP batch, which includes loading all hierarchy files and actual data and running all batch aggregations tasks needed for inventory roll. This task is the main task that needs to be scheduled to run on a weekly basis so the Administrator can see the most up-to-date location and product structures and information. Before scheduling this task, all necessary hierarchy and data files need to be uploaded to the SFTP server. This task runs the conditional execution of different tasks based on the various batch control flags set in the application.

This task runs the following activities in this order:

- Run Batch Calc: Batch Specific Flags and Set Export Flags
- Measure Export: Export all Plan Versions
- If Enable RMF CS Integration is set to true:
 - Transform RMS Files
 - Load Hierarchies
 - Load RMF CS Interface Files
 - Load non-RMF CS Interface Files
 - Run Batch Calc: Batch Agg for RMF CS data
 - Run Batch Calc: Transform RMF Warehouse Data
- If Enable RMF CS Integration is set to false:
 - Load Hierarchies
 - Load Actuals
 - Load non-RMF CS Interface Files
- Run Batch Calc: Weekly Batch Calc
- Run Batch Calc: Generate Forecast
- Refresh All Workbooks and Dashboard
- Run Auto Workbook Build

Transform RMS Files (batch_rms_xform)

This task is used to transform all hierarchy and data files from RMF CS to the MFP required format. This task transforms the RMF CS hierarchy and data files and also creates rms_hier.zip and rms_data.zip and copies them to the SFTP outgoing path. This task is mainly for creating the initial set of transformed RMF CS hierarchy files to build a new domain with the RMF CS hierarchy files using Self Service. The user does not need to use this task if there is no RMF CS integration.

This task runs the following activities in this order:

- Transform RMF CS Calendar Hierarchy File
- Transform RMF CS Product Hierarchy File
- Transform RMF CS Location Hierarchy File
- Transform RMF CS Currency Hierarchy File
- Transform RMF CS Inventory File
- Transform RMF CS On Order File
- Transform RMF CS Tran Data File
- Transform RMF CS Currency Conversion Rate File
- Transform RMF CS Location File

Transform RMS Warehouse Data (batch_rms_wh)

This task is used to transform the loaded RMF CS warehouse inventory and on-order data to the mapped MFP Channels. It actually creates an internal export of loaded warehouse inventory and on-order data, transforms warehouse to channels and reloads, and then runs the batch aggregates. This task runs as part of the regular Weekly Batch with RMF CS Integration enabled. The user needs to schedule this only if the user changes the Warehouse-Channel Mapping in the middle of week and would like to reallocate the Warehouse Inventory to the newly mapped Channels for all history in the middle of the week. The user does not need to use this task if there is no RMF CS integration.

This task runs the following activities in this order:

- Run Batch Calc - Initialize RMF CS Warehouse Data for Export
- Exports RMF CS Warehouse Inventory Data
- Transform RMF CS Warehouse Inventory with MFP Channel
- Exports RMF CS Warehouse On Order Data
- Transform RMF CS Warehouse On Order with MFP Channel
- Exports RMF CS Warehouse Receipt Data
- Transform RMF CS Warehouse Receipt with MFP Channel
- Load RMF CS Warehouse data to MFP Channel
- Run Batch Calc - Weekly Batch Calc

Export All Approved Plans (export_all)

This task is used to export all submitted and approved plan versions (all non-working plan versions). This task first runs the export set flag task and then exports all the plan versions. This task also runs as part of the daily or weekly batch, so the user needs to run this task only if they need to re-export all plan data on an on-need basis. The exported data is used in reports, customer's data marts, and query programs.

Following is the list of export plan versions that are exported for both MFP Retail Cloud Service and MFP Cost Cloud Service:

- Merch Plan - Current Plan
- Merch Plan - Original Plan
- Merch Plan - Submitted Plan

- Merch Target - Target Plan
- Location Plan - Current Plan
- Location Plan - Original Plan
- Location Target - Target Plan

For details on the versions for export, the list of measures exported in each file, and the file name and format details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Export All Working Plans (export_wp)

This task is used to export all the working plan versions. This task first runs the export set flags task and then exports all working plan versions. This task only needs to be run if the user wants an export of all working plan versions for any reporting needs.

Following is the list of export plan versions that are exported for both MFP Retail Cloud Service and MFP Cost Cloud Service:

- Merch Plan - Working Plan
- Merch Target - Working Plan
- Location Plan - Working Plan
- Location Target - Working Plan

For details on the versions for export, the list of measures exported in each file, and the file name and format details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Exports to Retail Insights (export_ri)

This task is used to export all approved Merch Plans for the planned periods to Oracle Retail Insights (RI) Cloud Service Suite. This can only be scheduled if the retailer has Oracle Retail Insights (RI).

Following is the list of export plan versions that are exported for both MFP Retail Cloud Service and MFP Cost Cloud Service:

- Merch Plan - Current Plan
- Merch Plan - Original Plan

For details about integration with RI, the list of measures exported in each file, and the file name and format details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Exports to Shared Services (export_ss)

This export set is used to export all approved Merch Plans and Location Plans for the planned periods to Assortment & Item Planning Cloud Service. It exports the required measures and copies the file to the common cloud service application share location RGBU_CLOUD_DATA. Assortment & Item Planning Cloud Service can access the file from that location.

For details about integration with RI, the list of measures exported in each file, and the file name and format details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Post Build Batch (postbuild)

This task is called after an initial domain build, to load and process all loaded data for the initial domain build. This task is called by default as part of the build script during the initial domain build.

Clean Up Task

This task is provided to clean up the processed files or unprocessed files from different cloud service locations to be run by the retailer on an on-need basis. This task has the following three options to select the locations to clean up when this task is scheduled:

- **Clean FTP Holding Area** - When incoming files are sent to the FTP site, a process then moves those files to an internal holding area from which the batch framework can process them. In cases where files are sent using FTP and then not used by any batch process (for example, if the batch configuration has changed or if a file was misnamed), it becomes stranded in the internal holding area. This option is provided to remove all files from the internal holding area. Note that all files currently in the internal holding area will be removed, so this option must not be used when any scheduled batch processes are executing.
- **Clean FTP Export Area** - Select this option to remove all files from the outgoing FTP holding area.
- **Clean processed folders** - All processed input files are archived within the domain/input/processed folders. This option can be used to remove all the processed directories within a domain to reduce the growing domain size.

Retrieve Batch Control Files

This task allows the currently configured batch control files to be retrieved, in case they must be inspected or modified. The set of files are packaged together as the archive file `batch_control.tar.gz`, and placed into the FTP area for retrieval. No parameters are required for this OAT task.

Upload Batch Control Files

This task allows you to upload updated batch control files. Before running this task, upload the updated batch control files to the FTP area for `batch_control`. No parameters are required for this OAT task other than the task label.

Manage JSON Files

JSON files are used for the Dashboard and Help links within the application. This task allows you to retrieve existing JSON files or upload updated JSON files.

Patch JSE Jars

If an Enterprise Edition customer is using some custom Java functions in their configuration, they can use this task to upload and register their JSE jar files.

Remove JSE Jar

If an Enterprise Edition customer wants to remove and un-register a custom jar file, specify the jar file and run this task to un-register and remove the file from the cloud environment.

Translation Tasks

This task has multiple sub-tasks to allow you to manage the translation files specific to your solution. Both Enterprise Edition and non-Enterprise Edition customers can upload their own custom translations. This task first applies the default GA translation and then on top of it, it will apply the custom translation. This task allows a customer to upload their own set of translation files, remove their last loaded custom translations, list the custom translations, apply custom translations, download all translations (including GA), and download custom translations.

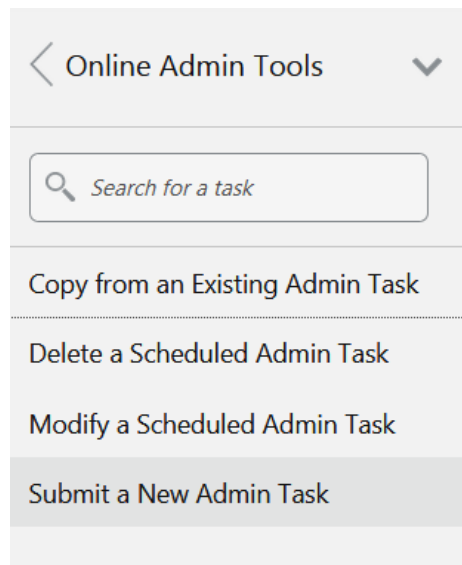
Scheduling Configured Batch Administration Tasks

This section walks through an example of the process for scheduling and monitoring the Configured Batch Administration task named Run Batch Measure Export Group. The steps for scheduling all other tasks are similar, and most of the tasks do not have additional input parameters specific to that task. For more details about scheduling and monitoring online administration tasks, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

To schedule and monitor a Configured Batch Administration task:

1. Log in to the MFP Retail Cloud Service (mfprcs) or MFP Cost Cloud Service (mfpcscs) application as an Administration user.
2. In the Tasks list, select Admin Tasks for MFP CS Retail/Cost Customer Domain and then select Online Admin Tools. Click **Submit a New Admin Task**.

Figure 1–1 Administration Tasks



3. Select the Configured Batch Tasks for Task Group and click **Next**.

Figure 1–2 Select Task Group Window

The screenshot shows a window titled "Submit a New Admin Task" with a close button (X) in the top right corner. Below the title bar, the text "Select Task Group" is displayed. There are four radio button options listed: "Configured Batch Tasks" (which is selected), "System Admin Tasks", "SR Admin Tasks", and "Patch Domain Task". At the bottom right of the window, there are four buttons: "Cancel", "< Previous", "Next >", and "Finish".

4. In the task list, select Run Measure Export Group and click **Next**.

Figure 1–3 Select Task Workbook Wizard Window

The screenshot shows the same window titled "Submit a New Admin Task" with a close button (X) in the top right corner. Below the title bar, the text "Select A Task From Configured Batch Tasks Group" is displayed. A list of tasks is shown, with "Run Batch Measure Export Group" highlighted in blue. The tasks listed are: "Run Batch Task Group", "Run Batch Calc Group", "Run Batch Measure Load Group", "Run Batch Measure Export Group", "Retrieve Batch Control Files", "Upload Batch Control Files", "Manage JSON files", "Patch JSE Jars", "Remove JSE Jar", "Clean Up Task", and "Translation Tasks". At the bottom right of the window, there are four buttons: "Cancel", "< Previous", "Next >", and "Finish".

5. Enter the Task Label. This task has an additional parameter to choose the export measure group. In following figure, as an example, Merch Plan - Current Plan is selected. Click **Next**.

Figure 1–4 Select Export Measure Group

The dialog box is titled "Submit a New Admin Task" and contains the following fields:

- Task Label:** A text input field containing "Exporting Data".
- Batch Export Measure Group:** A dropdown menu showing "Merch Plan - Current Plan".
- Log level:** A dropdown menu.

At the bottom right, there are four buttons: "Cancel", "< Previous", "Next >", and "Finish".

6. To schedule the task to run immediately, select **Run ASAP** and click **Next**. To run on a particular date and time, set that information, select **Run on a Schedule** (One time / Hourly / Daily / Weekly / Monthly). Provide the Server Start / Stop Date/Time and click **Next**.

Figure 1–5 Schedule Task Workbook Wizard Window

The dialog box is titled "Submit a New Admin Task" and contains the following fields:

- Schedule Task:** Two radio buttons: "Run ASAP" (selected) and "Run on a schedule".
- Run on a schedule:** A dropdown menu showing "One time".
- Server Start Date/Time:** A text input field containing "12/27/18 12:32 AM" and a calendar icon.

At the bottom right, there are four buttons: "Cancel", "< Previous", "Next >", and "Finish".

7. In the Confirm Action window, review the task scheduling details. To confirm the scheduling and submit the task, click **Finish**.

Figure 1–6 Confirm Action Window

Submit a New Admin Task

Verify and Confirm Before Clicking Finish

Action
Submit An Admin Task

Task
Run Batch Measure Export Group (Configured Batch Tasks)

Label
Exporting Data

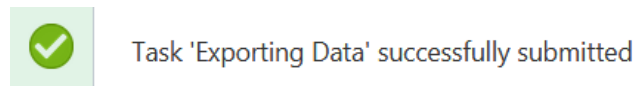
Batch Export Measure Group
Merch Plan - Current Plan

Execute:
Execute Immediate(ASAP)

Cancel < Previous Next > Finish

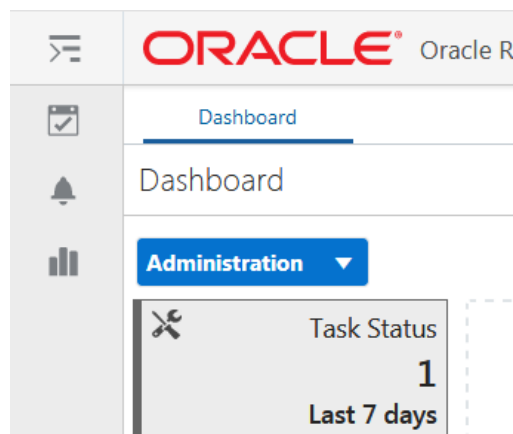
The task submitted confirmation message appears.

Figure 1–7 Task Submitted Confirmation Message



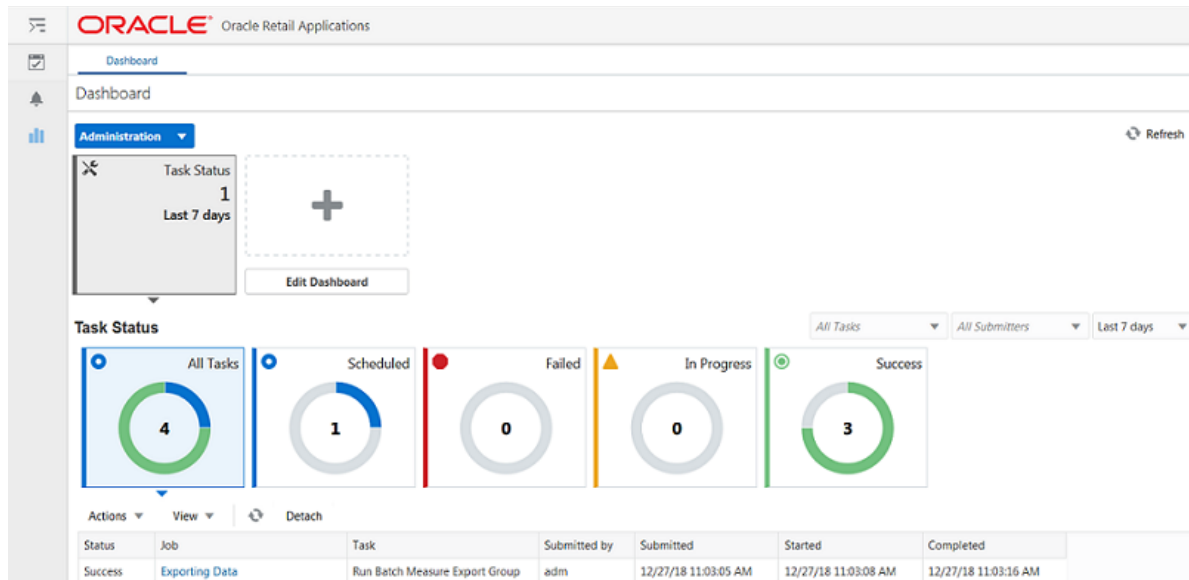
8. To check the status of all submitted tasks in the Dashboard, click **Dashboard** and select **Administration** from the list of Dashboard Profiles in the dropdown.

Figure 1–8 Location of Administration Dashboard Selection



At the bottom of the dashboard, it contains the lists of tasks submitted and their status.

Figure 1–9 Location of Administration Dashboard Selection



The Status column shows whether a job has completed successfully, failed, or is pending (Scheduled). For any completed (Success/Failed) tasks, click the job name to view the log. For failed tasks, the logs show the error details.

Following is an example of a log showing an error:

```
Service 'loadHier' failed with return code 2
03:13:24 : INFORMATION : eebatch_loadhier.ksh[116] - _call of command 'rpsace_run loadHier
-d /u07/projects/mfp/domains/mfprcs -load clnd -checkParents -purgeAge 14 -purgeBackups
-forceInputRollups -forceNAConsistency -maxProcesses 8 -loglevel all' complete
03:13:24 : ERROR : eebatch_loadhier.ksh[122] - Error Result from loadHier call.
03:13:24 : INFORMATION : eebatch_loadhier.ksh[122] - Exiting script with code: 102
03:13:24 : INFORMATION : eebatch_loadhier.ksh[1] - NO_EXIT_STATEMENT
```

Following is an example of a log showing the cause of an error:

```
<E 2018Apr23 03:13:14.426> loadHier (clnd) failed on domain: mfprcs
<E 2018Apr23 03:13:14.426> ReindexDomain must be run first to prepend CLND Dimensions.
<E 2018Apr23 03:13:14.426> Syntax: reindexDomain -d <domainPath> -hier CLND -prepend
<E 2018Apr23 03:13:14.426> LoadHier must be run again after reindexing the domain.
```

Note: The detailed log file can be found in the SFTP sever. The log file names are first appended with the text success/failure (with error code) along with the process name and control file entry set names and the time stamp for easy identification. For example:

success.eebatch_calc.exp_set.20190614124917.tar.gz

failure.13.eebatch_exec.setup.20190614043009.tar.gz

Modify Configured Batch Tasks

Due to a business requirement, the Administrator may need to modify a scheduled batch task. The Modify an Admin task capability of RPAS provides the Administrator the tool to handle this kind of situation.

For example, an Online Administration Tool task is currently scheduled for weekly once on Sunday, but due to a business constraint, the Administrator needs to run the specific task on Saturday instead of Sunday for a week. The Administrator can achieve the goal using the Modify an Admin task.

The alternate way of handling with any change in a scheduled task is by copying the scheduled task, changing the start date, and then deleting the original scheduled task.

The Administrator submits any configured Batch Task scheduled weekly on Sunday. The following steps walk you through the process of changing the schedule of any scheduled batch using Online Administration Tools:

1. Set up the Run Batch Task Group.

Figure 1–10 Schedule Task Window

The screenshot shows a window titled "Submit a New Admin Task" with a close button (X) in the top right corner. The window contains the following elements:

- Schedule Task** section:
 - ☐ Run ASAP
 - ☒ Run on a schedule
 - Weekly (dropdown menu)
- Server Start Date/Time:** 12/27/18 12:37 AM (with a calendar icon)
- Server Stop Date/Time:** 12/27/18 01:37 AM (with a calendar icon)
- Recur Every:** 1 week on (dropdown menu)
- Days of the Week:**
 - ☒ Sunday
 - ☐ Monday
 - ☐ Tuesday
 - ☐ Wednesday
 - ☐ Thursday
- Buttons:** Cancel, < Previous, Next >, Finish

2. Review the selected setup.

Figure 1–11 Confirm Action Window

Submit a New Admin Task

Verify and Confirm Before Clicking Finish

Action

Submit An Admin Task

Task

Run Batch Measure Export Group (Configured Batch Tasks)

Label

Run Batch Task Group

Batch Export Measure Group

Merch Plan - Current Plan

Execute:

Execute with a schedule (Weekly)

Recur every week on Sunday

Scheduled to run from 2019/01/01 11:55:00 PM to 2019/01/02 00:25:00 AM

Cancel

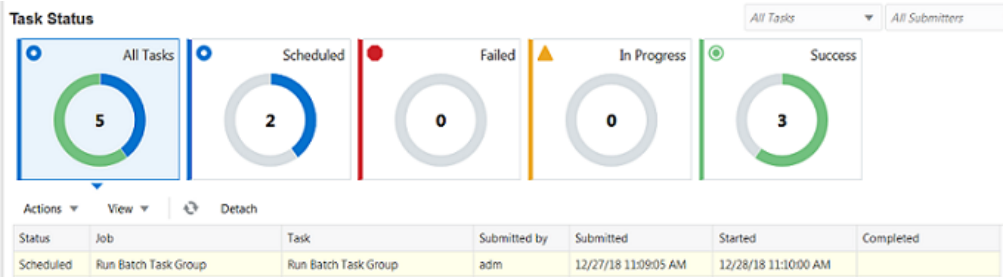
Previous

Next

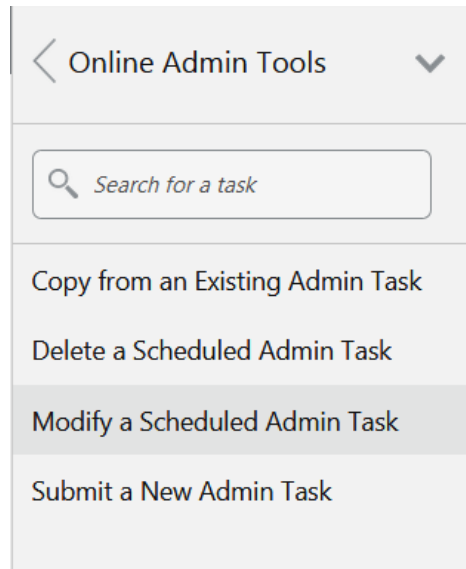
Finish

3. View the submitted task on the dashboard.

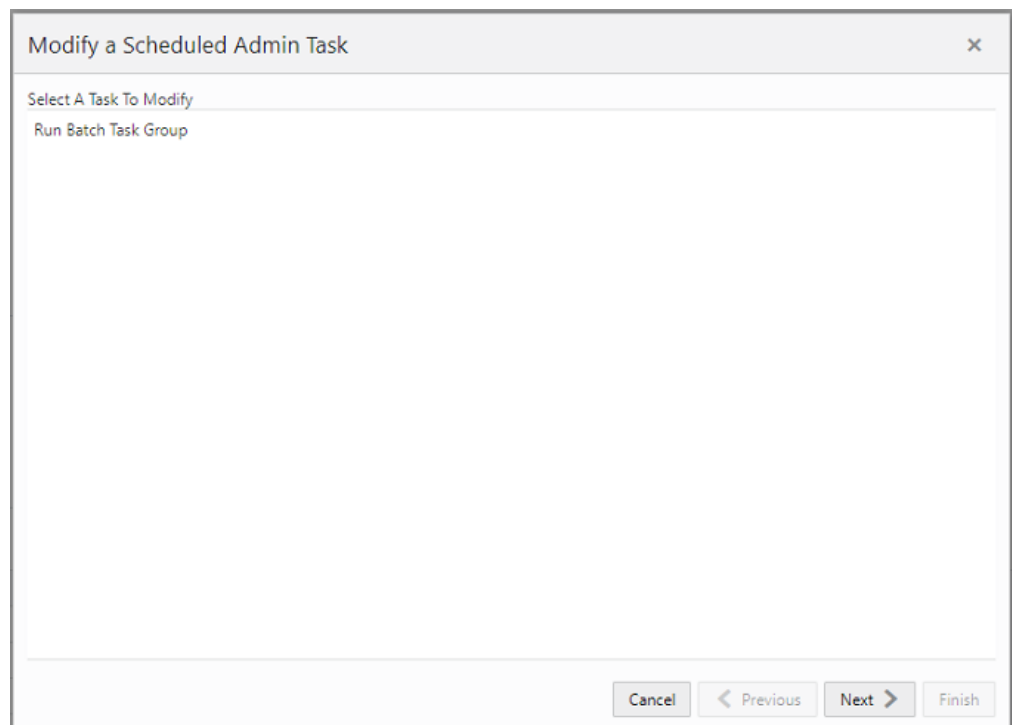
Figure 1–12 View of Submitted Task



4. Modify the task to run on Saturday rather than Sunday.

Figure 1–13 Admin Tasks

5. Select the task to modify.

Figure 1–14 Modify an Admin Task

6. Verify the details. Enter the new parameters for modification.

Figure 1–15 Modify an Admin Task

Modify a Scheduled Admin Task

Specify the arguments for task:

Task Label
Run Batch Task Group

Batch Export Measure Group
Location Plan - Current Plan

Cancel < Previous Next > Finish

Modify a Scheduled Admin Task

☐ Run ASAP

☒ Run on a schedule

Weekly

Server Start Date/Time:
01/06/19 04:44 AM

Server Stop Date/Time:
01/05/19 05:44 AM

Recur Every:
1 week on

☐ Sunday

☐ Monday

☐ Tuesday

☐ Wednesday

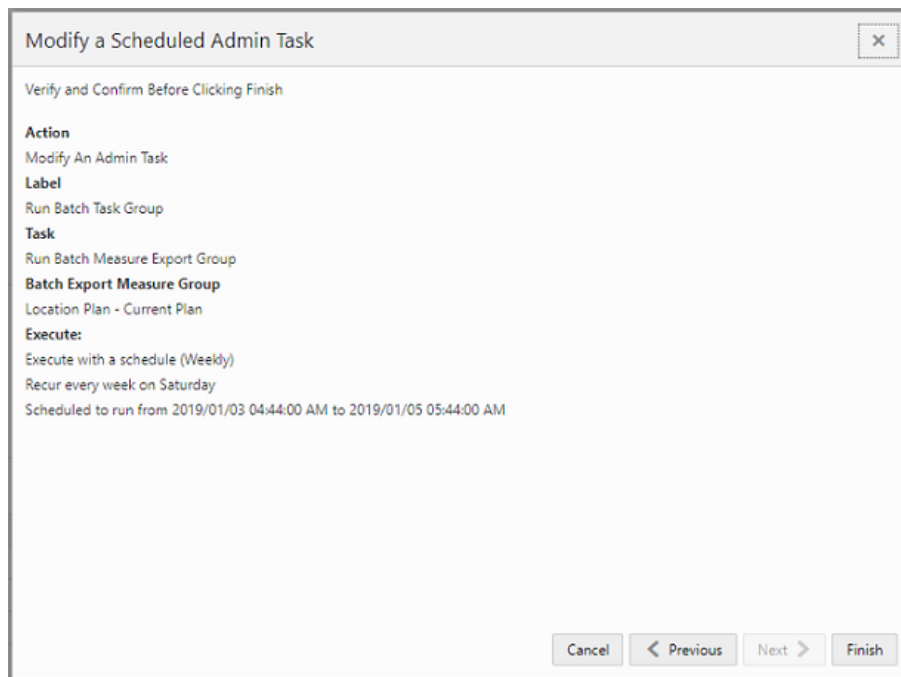
☐ Thursday

☐ Friday

☒ Saturday

Cancel < Previous Next > Finish

7. Submit the modified task.

Figure 1–16 Confirm Action Window

Dashboard

The Dashboard provides pre-configured dashboard profiles to the user once logged into the application. There are six profiles pre-configured for MFP CS:

1. Administration - task status
2. MFP: In-Season
3. MFP: Pre-Season
4. MT: Exceptions
5. MP: Exceptions
6. LP: Exceptions

For more information about the usage of Dashboards in MFP CS, see the *Oracle Retail Merchandise Financial Planning Cost Cloud Service User Guide* and *Oracle Retail Merchandise Financial Planning Retail Cloud Service User Guide*.

The dashboard pulls the data from an admin workbook built from the Online Administration Tool. In order to view the dashboard, an Administrator must schedule the dashboard builds from the System Admin Tasks.

Figure 1–17 Schedule Dashboard Build Task

Submit a New Admin Task

Select A Task From System Admin Tasks Group

- Load Hierarchy Data
- Load Measure Data
- Manage Dimensions
- Manage Hierarchies
- Manage Informal Positions
- Manage Users
- Manage Workspaces
- Measure Information
- Optimize Domain
- Purge tasks from online admin dashboard
- Reindex Domain
- Rename Positions
- Scan Domain
- Schedule Dashboard Build**
- Segment/Workspace Batch Operation
- View and Manage Domain Properties

Cancel < Previous Next > Finish

Figure 1–18 Specify Arguments for Schedule Dashboard Build Task

Submit a New Admin Task

Specify the arguments for task:

Task Label

☐ Override RPAS_TODAY? Uncheck to default system setting

Range dimension
 Year

Pre-Season Range
 1

Post-Season Range
 1

☐ Delete and Recreate Dashboard Segment? (Warning : Use this option only if dashboard template styles are patched. Dashboard will loose all user formatting if we delete and recreate segment.)

For
☒ All users
☐ Group
 Administrator

Cancel < Previous Next > Finish

- Task Label - Enter the name of the build task to review the status of build.
- Select Override RPAS_TODAY - Check box and then select a date, if you need to build the dashboard as of a day other than the current date.

- Range dimension - Calendar dimension against which the dashboard will be pre-ranged.
- Pre-Season Range - Number of periods of the Range dimension that need to be included before the Current Period Range. The Current Period Range will always be included.
- Post-Season Range - Number of periods of the Range dimension that need to be included after RPAS_TODAY.
- Select Delete and Recreate Dashboard Segment check box, only if there are any changes to the dashboard template selection after patching.
- Users - Select All Users, Group, or Users that can access that dashboard.

Note: For the configured GA profiles, the preferred selections are Range dimension: Half, Pre-Season Range: 0, and Post-Season Range: 1.

Batch File Uploads/Downloads

The following sections describe the file upload/download process. For the batches that load data, the Administrator needs to upload the relevant files which load the data to the SFTP server before running the batch. After running any export task, the exported files can be found in the export location of the SFTP server.

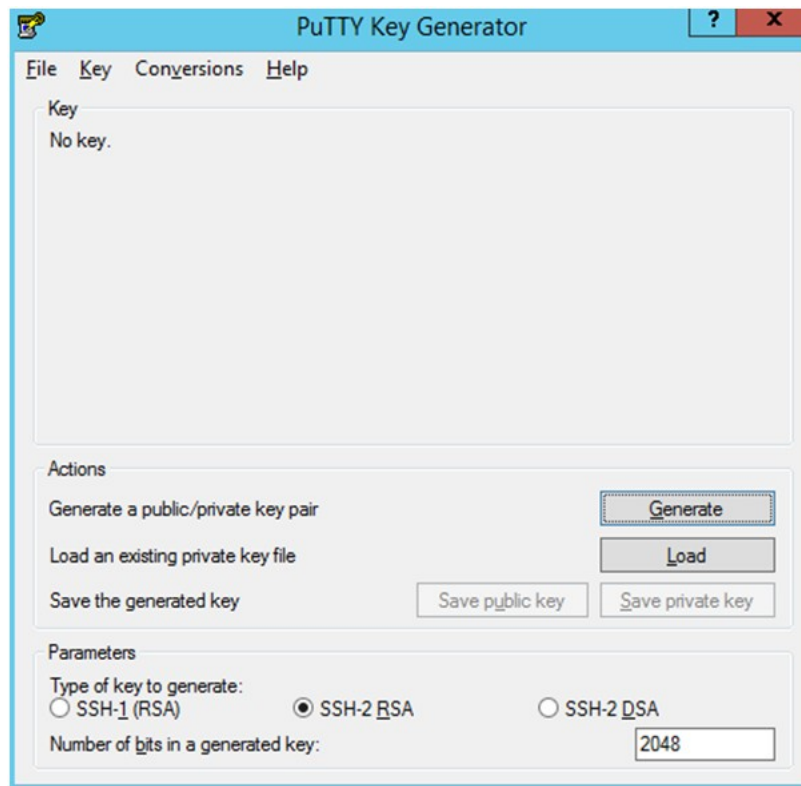
For details regarding file contents and formatting of the upload and download files, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Adding Authorized Keys

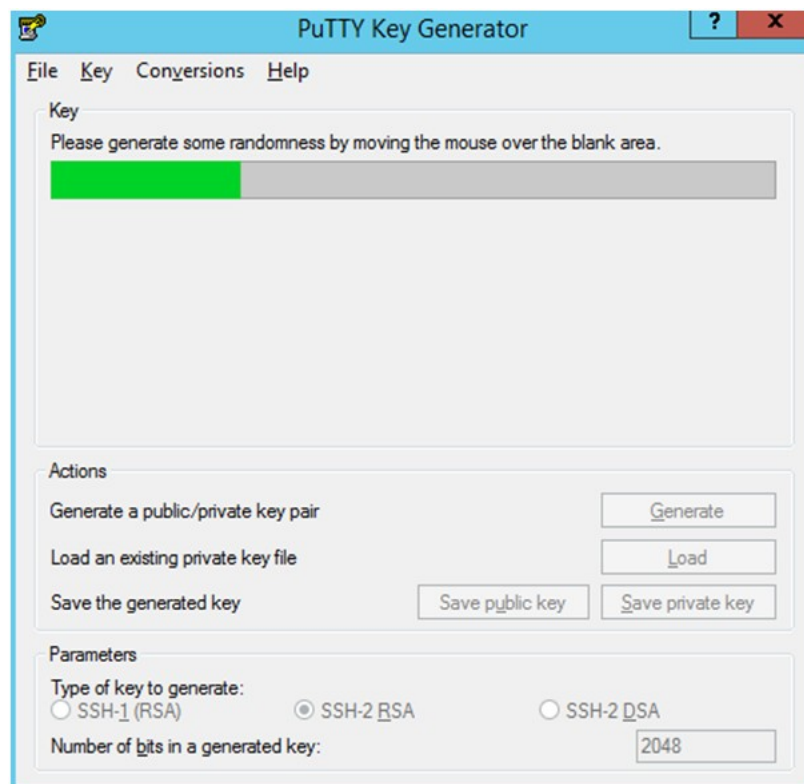
This section describes the process to generate a 2048 bit RSA key and add the same to the SFTP server. This is done with the help of the WinSCP tool on Windows. However, the same can be done using ssh-keygen on Linux as well.

Prerequisites:

- The WinSCP tool must be installed before performing the following process.
 - The Private/Public keys must be generated and the Public key must be associated with your SFTP Account for the file upload/Download.
1. Launch WinSCP and select Tools > Run PuttyGen.
 2. Select SSH-2 RSA for the type of key to generate and enter 2048 for the number of bits in a generated key field. Click **Generate**.

Figure 1–19 Key Generator

3. Move the mouse over the blank space in the window until the key is generated. Moving the mouse over the blank space creates a random pattern which is used for key generation.

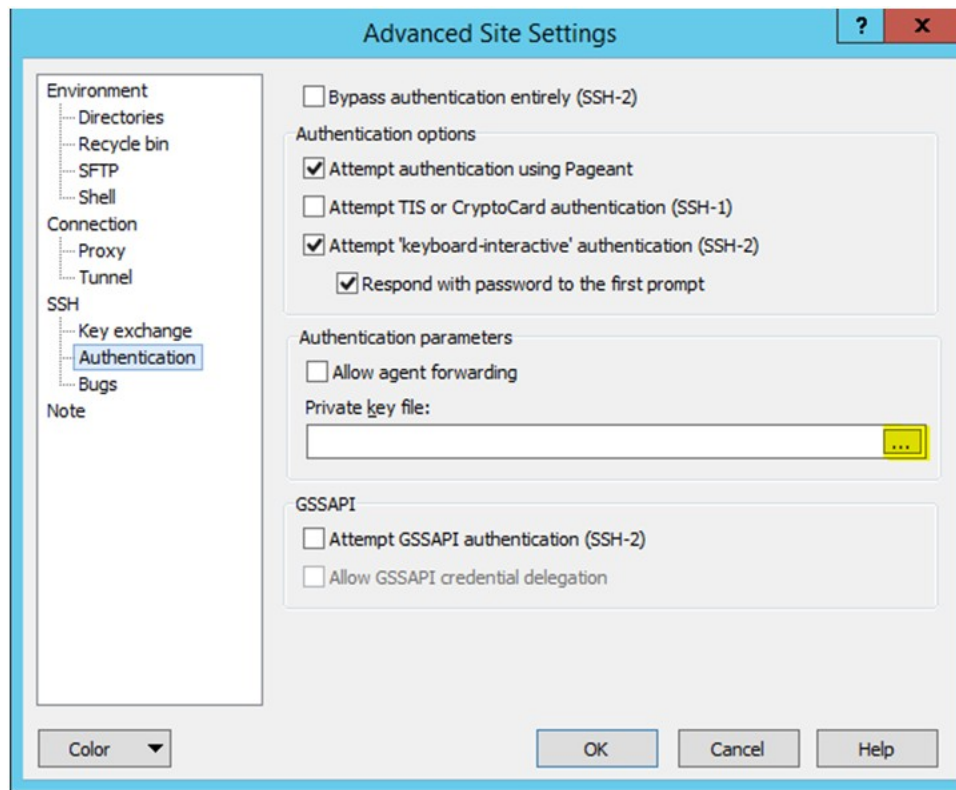
Figure 1–20 Key Generator Progress

4. Once the key is generated, click **Save public key** to save the public key to a file.
5. Click **Save private key** to save the private key to a file. Confirm to save it with or without a passphrase.
6. Open an SR with Oracle Support, to associate the public key with your SFTP account (attach the key with the SR).

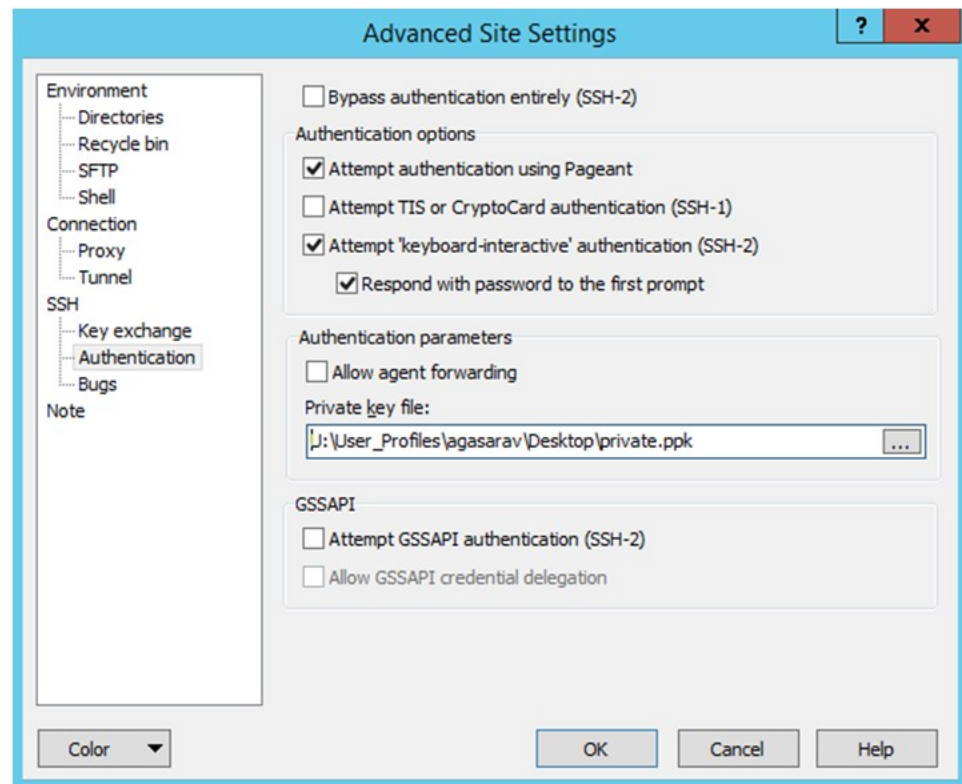
Logging In to WinSCP

The upload steps use the private key generated in the [Adding Authorized Keys](#) section.

1. Launch WinSCP and connect to <SFTP Server> using port 22.
2. Enter the user name and click **Advanced**.
3. Click **Authentication**.
4. In the Private Key File field, click **Browse** and select the private key created in the [Adding Authorized Keys](#) section.

Figure 1–21 Advanced Site Settings Dialog

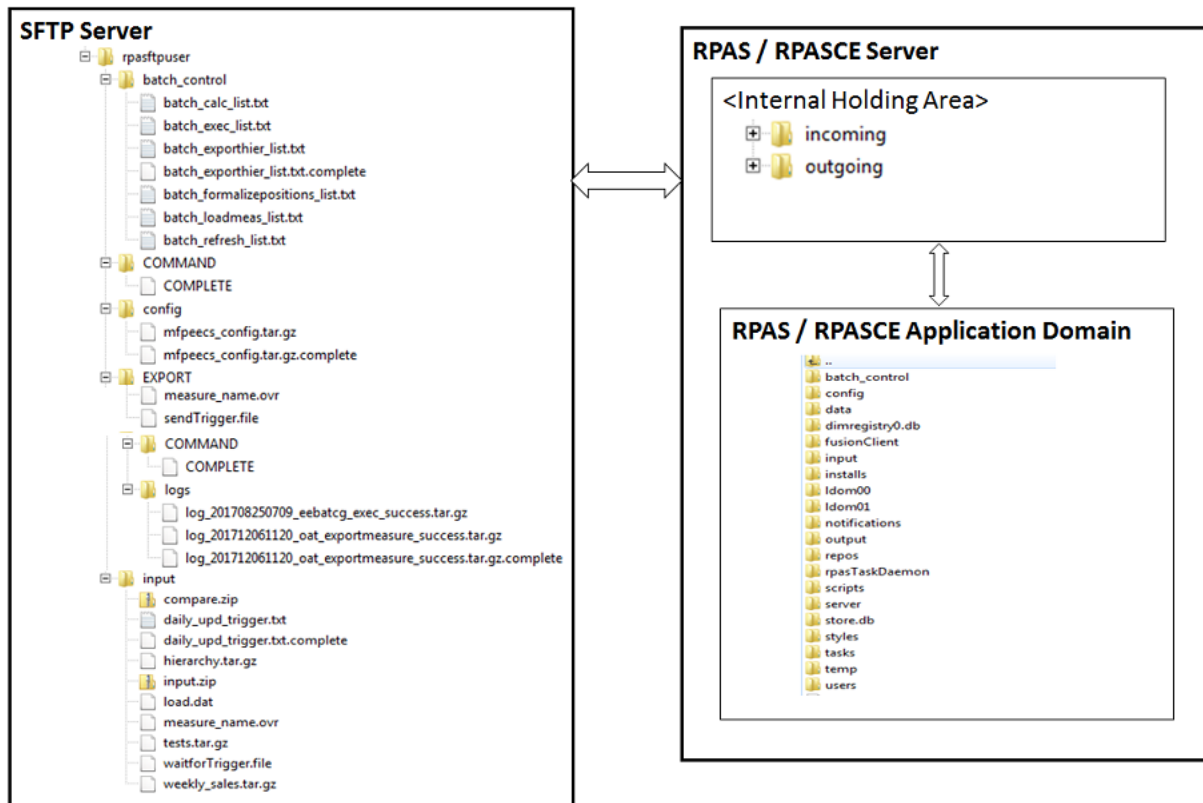
5. After loading the private key file, click **OK**.

Figure 1–22 Private Key File Loaded

6. Click **Login**. The window does not prompt for a password and logs in to the SFTP server. Provide a passphrase if one has been set up.

Uploading the Batch File

The following diagram provides an overview of the FTP/internal holding area/domain and how the files move.

Figure 1–23 File Movement Between Internal Holding Area and Domain

The following steps walk you through the process to upload batch (data/Hierarchy) file. For information about the administration tasks that require uploading batch files, see "[Application-Specific Batch Tasks](#)."

For information about the file contents of various exports and formatting, see the information on data load in the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

To upload the batch file:

1. Log in to WinSCP. Follow the steps in "[Logging In to WinSCP](#)."
2. Transfer all the data files to the directory /<SFTP User>.
3. Create a directory named COMMAND under /<SFTP User> if it does not already exist.
4. Change to the /<SFTP User>/COMMAND directory.
5. Transfer an empty file named COMPLETE.
6. Run the required batch/task from the Online Administration Tools.

File Downloads

The following steps walk you through the process of accessing download files. For information about the administration tasks that create different exports from the applications, see "[Application-Specific Batch Tasks](#)."

For information about the file contents of various exports and formatting, see the information on exports in the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

To download files:

1. Log in to WinSCP. Follow the steps in "[Logging In to WinSCP](#)."
2. Change the directory to /<SFTP User>/EXPORT or /<SFTP User>/Export/logs (for log files).
3. Create a directory named COMMAND under /<SFTP User>/EXPORT if it does not already exist.
4. Change to the /<SFTP User>/EXPORT/COMMAND directory.
5. Transfer an empty file named COMPLETE.
6. Run the required batch/task from the Online Administration Tools.
7. Download all the data files. The log files are in tar.gz format.

Note: The log file names are appended with the success/failure text in it along with the time stamp for easy identification.

For example:

success.<process_name>.<set_name>.<timestamp>.tar.gz and
failure.<error_code>.<process_name>.<set_name>.<timestamp>.
tar.gz

Install/Patch Domain

This chapter describes the process to install or patch a domain.

Self Service - Installing the MFP Cloud Service Application from the Bootstrap Domain

This section describes the process of installing MFP Cloud Service from the bootstrap domain with retailer data and generated configuration for the plug-in options. Once RPAS CE and MFP Cloud Service are installed in the Oracle Cloud environment, the Administrator will have the option to overwrite and install the domain with GA data or with retailer data. The Administrator also has the option to generate the configuration for different plug-in options.

Bootstrap Environment

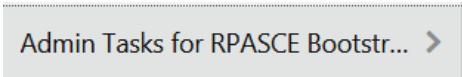
A newly provisioned MFP CS environment is set up with a bootstrap configuration that allows the Administrator to log and access the Online Administration Tools (OAT) interface before the domain has been built. The bootstrap OAT configuration allows only tasks required to construct a domain. Once the domain has been constructed, the domain task and the bootstrap activities both will be available. This allows the domain to be rebuilt from scratch multiple times if needed.

Installation from the Bootstrap Domain

The following steps take you through the process of building a customer domain for MFP Cloud Service using the bootstrap domain:

1. After installing MFP Retail Cloud Service or MFP Cost Cloud Service, log in to the bootstrap domain as an Administration user.
2. In the Tasks list, select Admin Tasks for RPASCE Bootstrap and then Online Admin Tools. Click **Submit a New Admin Task**.

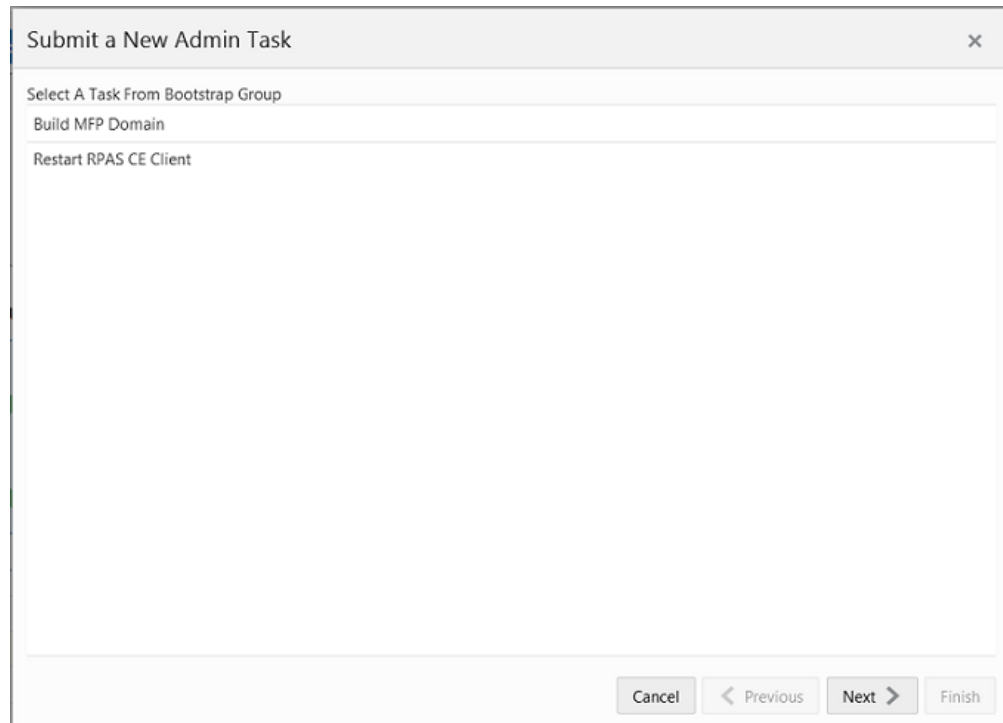
Figure 2-1 Admin Tasks for RPASCE Bootstrap Task



Admin Tasks for RPASCE Bootstr... >

3. Select the Build MFP Domain task and click **Next**.

Figure 2–2 Select Build MFP Cloud Service Domain Task



Submit a New Admin Task

Select A Task From Bootstrap Group

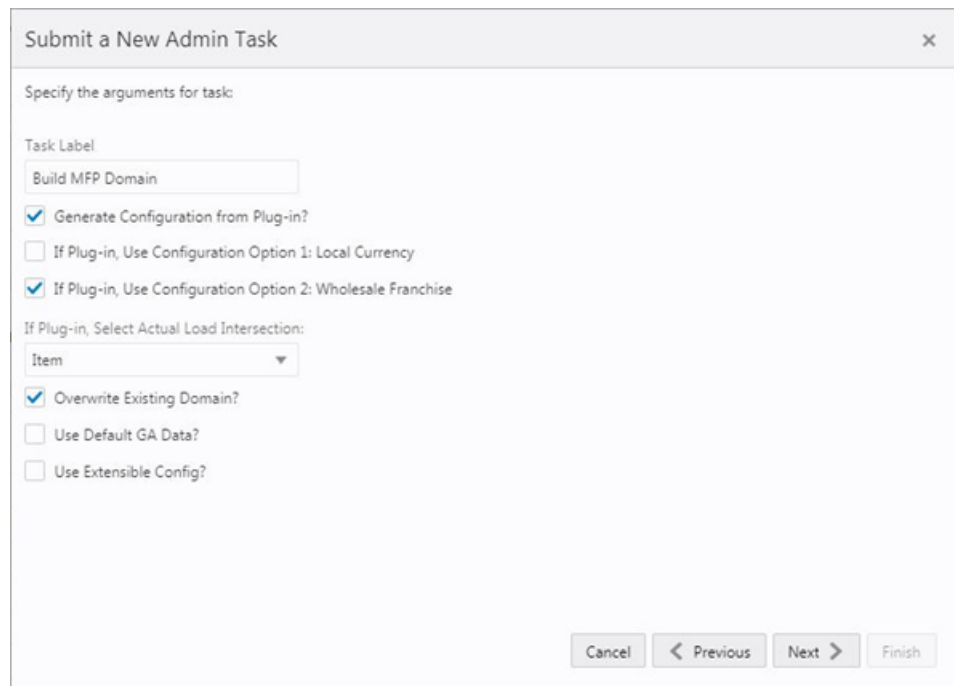
Build MFP Domain

Restart RPAS CE Client

Cancel < Previous Next > Finish

4. Set the arguments for the task:

Figure 2–3 Select Build MFP Cloud Service Domain Task Arguments



Submit a New Admin Task

Specify the arguments for task:

Task Label

Build MFP Domain

☒ Generate Configuration from Plug-in?

☐ If Plug-in, Use Configuration Option 1: Local Currency

☒ If Plug-in, Use Configuration Option 2: Wholesale Franchise

If Plug-in, Select Actual Load Intersection:

Item

☒ Overwrite Existing Domain?

☐ Use Default GA Data?

☐ Use Extensible Config?

Cancel < Previous Next > Finish

- a. Enter the Task Label.
- b. To generate a configuration from the plug-in, check the Generate Configuration from the Plug-in checkbox and then select the plug-in option to

use. In the above figure, the Configuration Option Wholesale Franchise is selected and Actual Load Intersection is selected as Item.

For information on plug-in choices and details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

- c. If the domain was already created and needs to be overwritten, select Overwrite Existing Domain.
 - d. If Use Default GA Data is not selected, the input hierarchy and data files should have already been uploaded.
 - e. If Use Extensible Config? is selected, the customer should upload the extensible configuration, created from the GA configuration as <app_name>_config.tar.gz to the FTP config directory. The customer can also upload the corresponding input files as <app_name>_input.tar.gz to the FTP input directory and upload the custom batch control files as batch_control_cust.tar.gz to the FTP batch_control directory. The process will first validate if the uploaded extensible custom configuration is valid; only if it is valid, will the domain be built. If the customer uses the Extensible Config option, there is no need to choose any plug-in option as it will use the plug-in options used by uploaded extensible configuration.
 - f. After choosing all the necessary options, click **Next**.
5. Select the time to schedule the task and click **Next**. Click Run ASAP if the Administrator wants to run the task now or the task can be scheduled by selecting the Run on a Schedule option.

Figure 2–4 Schedule Task

Submit a New Admin Task

Schedule Task

☒ Run ASAP

☐ Run on a schedule

One time

Server Start Date/Time:

12/27/18 12:53 AM

Cancel < Previous Next > Finish

6. Review the selections and click **Finish**.

Figure 2–5 Verify and Confirm Selections

Submit a New Admin Task

Verify and Confirm Before Clicking Finish

Action
Submit An Admin Task

Task
Build MFP Domain (Bootstrap)

Description
Build MFP Domain from Config

Label
Build MFP Domain

Generate Configuration from Plug-in?
If Plug-in, Use Configuration Option 2: Wholesale Franchise

Overwrite Existing Domain?

Execute:
Execute Immediate(ASAP)

Cancel < Previous Next > Finish

7. After submitting, review the status of that task in the dashboard similar to any other standard administration tasks.
8. After the task is successfully completed, schedule the other task, Restart RPASCE Client, in order to bounce WebLogic for changes to the configuration and task flow files.

Note: Users will not be allowed in the application while building and patching the domain.

Self Service - Patching the MFP Cloud Service Application

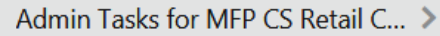
This section describes the process of patching the MFP Cloud Service application using the Online Administration Tools. Once the RPAS CE and MFP Cloud Service upgrade patches are installed in the Oracle Cloud environment, the MFP application will be patched by default with the latest configuration with the last used plug-in options or use the last used extensible configuration, if it was uploaded by customer. However, if the customer wants to reapply the patch with changes to the plug-in option or use an updated extensible configuration, the customer can use this task. Before scheduling this task, the Administrator should ensure that no users are logged in to the application while patching the solution.

The following steps walk you through the process to patch the MFP Cloud Service application as an Administration user:

1. After installing MFP Retail Cloud Service or MFP Cost Cloud Service, log in to the application as an Administration user.

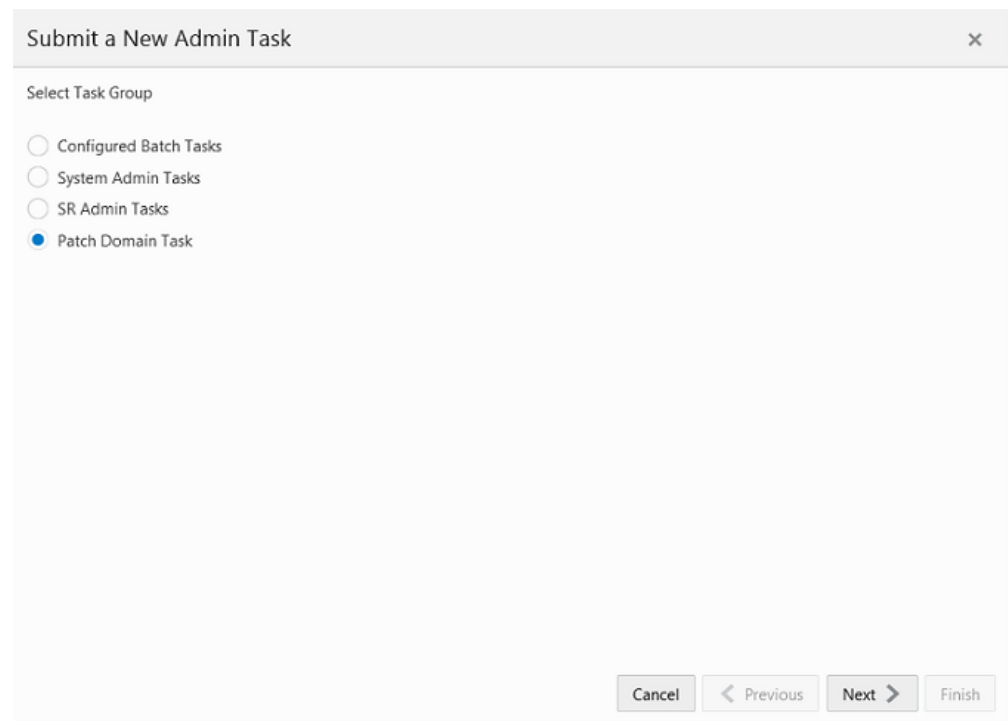
2. In the Tasks list, select Admin Tasks for MFP CS Retail CS for MFP Retail (or MFP CS Cost CS for MFP Cost) and then Online Admin Tools. Click **Submit a New Admin Task**.

Figure 2–6 Admin Tasks for MFP CS Retail Task



3. Select Patch Domain Task and then click **Next**.

Figure 2–7 Select Patch Domain Task



4. Set the arguments for the task:

Figure 2–8 Select Patch MFP Cloud Service Domain Task Arguments

Submit a New Admin Task

Specify the arguments for task:

Task Label
Patch MFP Domain

Offline Mode Message

☒ Generate Configuration from Plug-in?

☐ If Plug-in, Use Configuration Option 1: Local Currency

☒ If Plug-in, Use Configuration Option 2: Wholesale Franchise

If Plug-in, Select Actual Load Intersection:
Item

☐ Use Extensible Config?

Cancel < Previous Next > Finish

- a. Enter the Task Label and Offline Mode Message.
- b. To generate a configuration from a Plug-in, check the Generate Configuration from Plug-in checkbox and then select the plug-in option to use. In the above figure, the Configuration Option Wholesale Franchise is selected and Actual Load Intersection is selected as Item.

For information on plug-in choices and details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

- c. If Use Extensible Config? is selected, the customer should upload the extensible configuration, created from the GA configuration as `<app_name>_config.tar.gz` to the FTP config directory. The customer can also upload the corresponding input files as `<app_name>_input.tar.gz` to the FTP input directory and upload the custom batch control files as `batch_control_cust.tar.gz` to the FTP batch_control directory. The process will first validate if the uploaded extensible custom configuration is valid; only if it is valid, will the domain be built. If the customer uses the Extensible Config option, there is no need to choose any plug-in option as it will use the plug-in options used by uploaded extensible configuration.
 - d. After choosing all the necessary options, click **Next**.
5. Select the time to schedule the task and click **Next**. Click Run ASAP if the administrator wants to run the task now or the task can be scheduled by selecting the Run on a Schedule option.

Figure 2–9 Schedule Task

Submit a New Admin Task

Schedule Task

☒ Run ASAP

☐ Run on a schedule

One time

Server Start Date/Time:

12/27/18 12:57 AM

Cancel

< Previous

Next >

Finish

6. Review the selections and click **Finish**.

Figure 2–10 Verify and Confirm Selections

Submit a New Admin Task

Verify and Confirm Before Clicking Finish

Action

Submit An Admin Task

Task

Patch MFP Domain (Patch Domain Task)

Description

Patch MFP Domain

Label

Patch MFP Domain

Generate Configuration from Plug-in?

If Plug-in, Use Configuration Option 2: Wholesale Franchise

If Plug-in, Select Actual Load Intersection

Item

Execute:

Execute Immediate(ASAP)

Cancel

< Previous

Next >

Finish

7. After submitting, review the status of that task in the dashboard similar to any other standard administration tasks.

Install/Patch Domain 2-7

User and Role Maintenance

This chapter describes the process for managing users and roles. The Administrator can create users and assign the level of access as needed. This chapter describes how to create/modify/delete a user and assign roles to a user.

If your Merchandise Financial Planning Cloud Service is configured with Oracle Identity Cloud Service (IDCS) for managing users and access, follow the instructions in this chapter.

In order to provide application access to end users, the Cloud Service Administrator needs to create the user's account from IDCS. Follow the steps in "[IDCS User Creation](#)." The user must also be assigned to a group in IDCS.

Note: The list of groups in [Table 3–1](#) are provided by default. It is not required that additional groups be created by the user.

To complete the user provisioning activity, the same user name must be added in the Merchandise Financial Planning Cloud Service application and assigned to a necessary group.

MFP Cloud Service is built with role-based access. Permissions are associated with roles. [Table 3–1](#) lists the available roles.

Table 3–1 Merchandise Financial Planning Cloud Service Default Enterprise Roles

Application Module	Default Application Roles	Corresponding Application Roles
MFPCS	MFP_ADMIN	MFP_ADMIN
MFPCS	MFP_USERS	MFP_USERS
MFPCS	MFP_PLANNERS	MFP_PLANNERS
MFPCS	MFP_BUYERS	MFP_BUYERS
MFPCS	MFP_APPROVERS	MFP_APPROVERS

Note: The list of groups in the above table are provided by default. It is not required for additional groups to be created by the user.

For Enterprise Edition Cloud Service provisions, only the EECS_ADMIN and EECS_USERS roles will be available. The customer can create additional roles, if needed for their configuration.

The Administrator can assign the above role or roles to the user. Follow the steps in ["Managing Users in IDCS."](#)

For detailed information on the tasks related to user and role, see the following sections:

- [User Maintenance through IDCS:](#)
 - [IDCS User Creation](#)
 - [Managing Users in IDCS](#)
- [Bulk Loading of User and User Groups from IDCS](#)

User Maintenance through IDCS

This section describes how to maintain users through Oracle Identity Cloud Service (IDCS).

IDCS User Creation

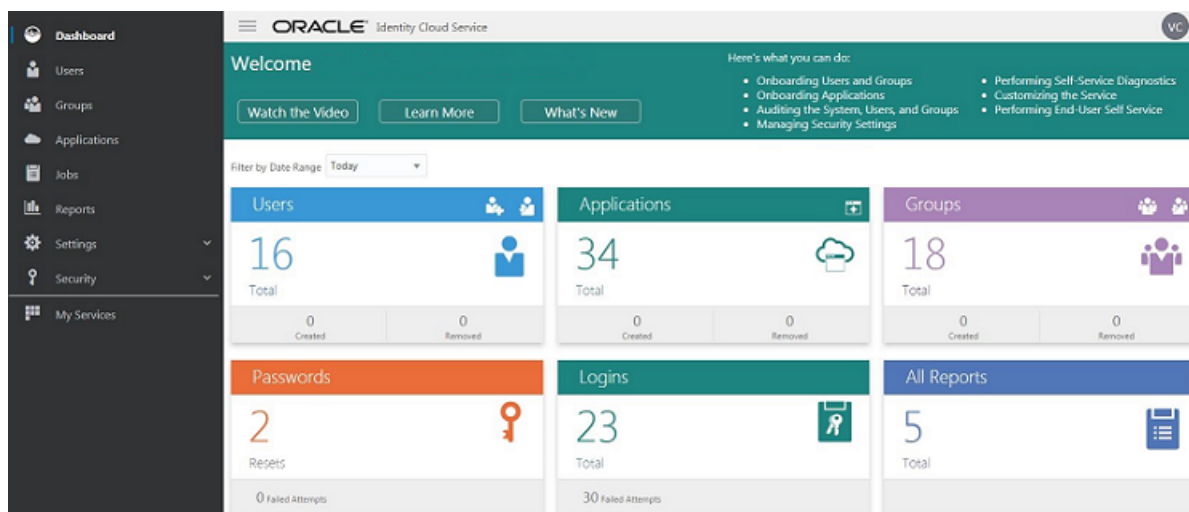
Before users can access the Oracle Retail Merchandise Financial Planning Cloud Service applications, it is necessary to provision access to the system for each user and to assign roles to each user to control what functionality will be available to the user. The access provisioning can be done using IDCS. After creation of the user in IDCS, the Administrator needs to create the same user with the same user group (that is, the role in IDCS) in the Oracle Retail Merchandise Financial Planning Cloud Service application.

Note: The IDCS Application URL and login with the required administrator access are needed to perform the following steps. The welcome email sent by Oracle includes the URL.

The following steps explain how to define users and assign roles for a new user:

1. Log in to the IDCS application. The dashboard view is shown by default.

Figure 3–1 IDCS Dashboard



2. Click the Add a user icon.

Figure 3–2 Add User Icon

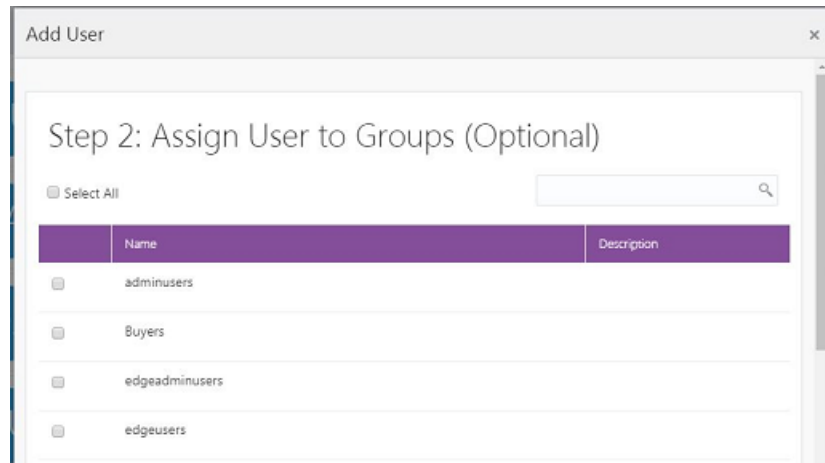
3. Provide the First Name, Last Name, and unique user name. If the option "Use the email address as the user name" is checked, the system automatically takes the email address as the user name.

Note: Oracle recommends using the email address as the user name.

Figure 3–3 IDCS Add User Details Window

4. Assign the user to a group. Typically, this will be the group specific to the provisioned service or application. The user can be assigned to more than one user group, but it is recommended to assign a user to only one group.

The available roles are listed in [Table 3–1](#). For example, you could assign the user being created to the MFP_BUYERS role.

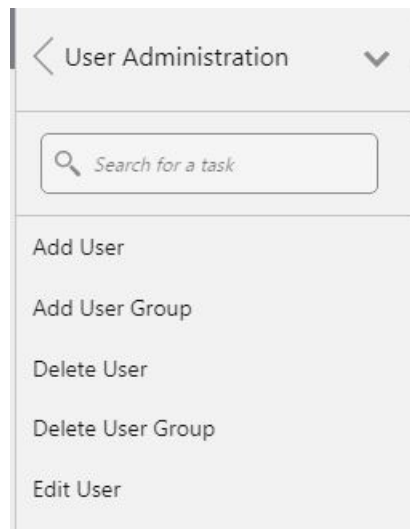
Figure 3–4 IDCS Assign User to Groups Window

5. Click **Finish** to complete the user creation in IDCS.
6. To complete the user setup, the same user must be created in the Merchandise Financial Planning Cloud Service application. To add the user to the Merchandise Financial Planning Cloud Service application, follow the steps in ["Adding a User to the MFP CS Application."](#)

Adding a User to the MFP CS Application

To add a user to the MFP CS application:

1. Under User Administration, click **Add User**. A Workbook Wizard window appears.

Figure 3–5 User Administration

2. In the Workbook Wizard window, enter the relevant information in the following fields:

Figure 3–6 Add User Details

The screenshot shows a web form titled "Add User". It contains the following elements:

- User name:** A text input field.
- User label:** A text input field.
- Default group:** A dropdown menu with "Admin" selected.
- Other groups:** A list box with "Admin" selected.
- Administrator:** An unchecked checkbox.
- Lock user account:** An unchecked checkbox.
- Inherit Group Default Rights:** An unchecked checkbox.

- **User name:** Enter the user name that the user uses for logging in. This user name should be the same as the user name created in IDCS.

Note: Each user name must begin with a letter and contain only alphanumeric characters and underscores. It cannot have spaces. User names are not case sensitive.

- **User label:** Enter a label that describes the user (for example, the user's full name). This identifying label appears in various locations throughout the application.
- **Default group:** Select the user group to which the user belongs. The group selected for the user should be same as the role selected for the same user in IDCS.

The available roles are listed in [Table 3–1](#). For example, you could assign the user being created to the MFP_BUYERS role.

- **Other groups:** If a user belongs to more than one group, select the additional groups from the list in the Other groups field.

Note: Passwords are not used by the RPAS CE Client. The password is defined and managed by your external authentication provider.

3. If the user requires Administration status, check the Administrator box. To make the user an Administrator, it is mandatory to check this check box.

Note: Administrative users have special privileges and the read-only status may not apply to them.

If you are not sure whether a user should be granted this ability, you can modify the Administration status later in the Security Administration workbook.

Note: Granting users Administration status gives them access to all workbook templates, but it does not automatically give them access to all workbooks.

4. Select the Lock user account check box to temporarily disable the user's account.
5. Select the Inherit group default rights check box so that the user can inherit the default rights set for the user group through the Group Workbook Template Default Rights and Group Measure Default Rights worksheets. If the Inherit group default rights option is not selected and the Administrator check box is not selected, then the user is assigned Denied access rights to all templates and measures. If the Inherit group default rights option is not selected but the Administrator check box is selected, then the user is assigned Full Access rights to all templates and Read/Write rights to all measures.
6. Click **Finish** to add the new user to the database.

Workbook template and measure access rights can now be assigned to the user. To do this, access the Security Administration workbook. For more information, see the Accessing Security Administration section in the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Adding a User Group

User groups provide an intermediate level of security to workbooks that were created and saved by specific users. When new users are assigned to the system, they must be assigned to existing user groups. User groups should consist of individuals with similar job functions or responsibilities. In the Oracle Retail Predictive Planning Suite, the user group corresponds to the user's planning role.

To add a user group:

1. Under User Administration, click **Add User Group**. A Workbook Wizard window appears.
2. In the Workbook Wizard window, enter the relevant information into the following fields:
 - In the Group Name field, enter a name for the group.

Note: Each group name must begin with a letter and contain only alphanumeric characters and underscores. It cannot have spaces. User group names are case sensitive.

- In the Group Label field, enter a descriptive label for the group. This label is displayed when referring to the group throughout RPAS CE.
3. Click **Finish** to add the user group to the database.

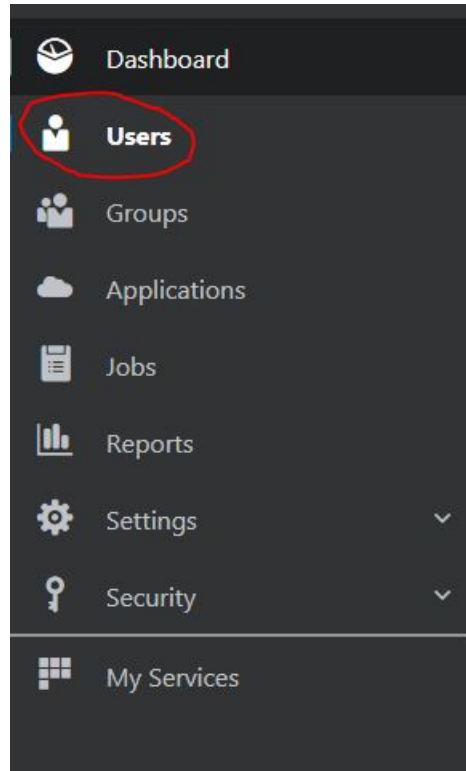
Managing Users in IDCS

After users are created in IDCS, the Administrator can manage user information, manage user groups assigned to users, delete or revoke user access, and reset a password.

The following steps explain how to manage users in IDCS:

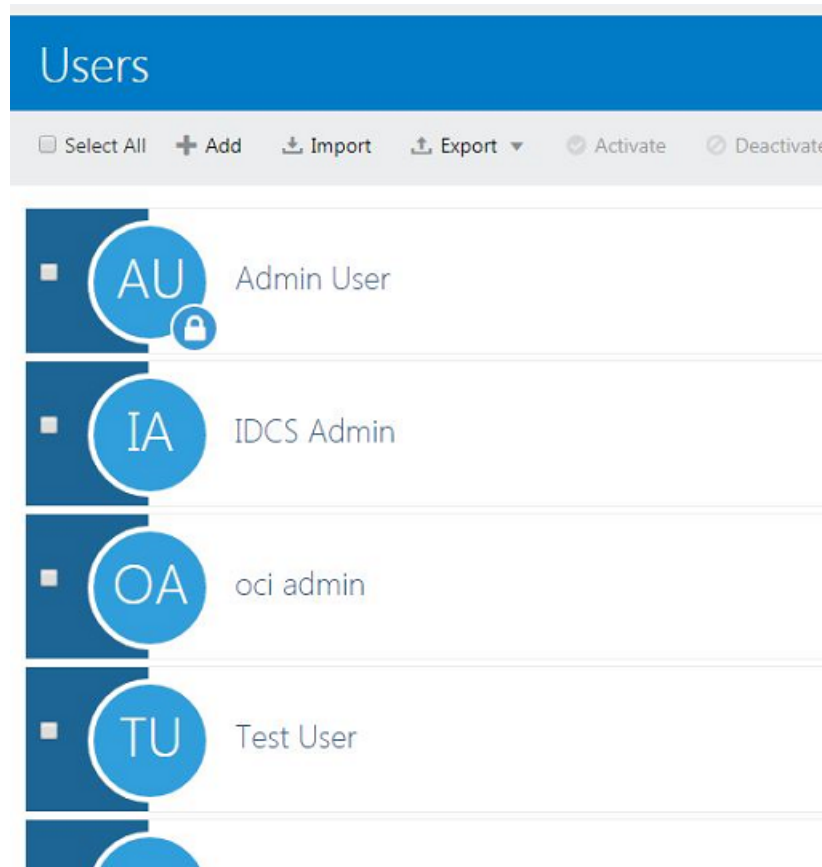
1. Log in to the IDCS application. The dashboard view is shown by default.
2. Select Users from the menu. The list of users in the system is displayed.

Figure 3–7 IDCS Dashboard Menu



3. Click the user that you want to edit.

Figure 3–8 IDCS List of Users



4. You can update the additional information for the selected user. Once updated, click **Update User** to confirm the changes.

Figure 3–9 IDCS Account Information Window

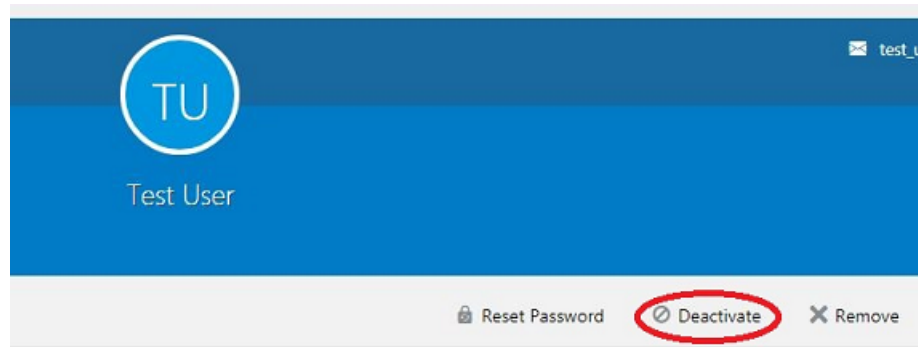
The screenshot shows the 'Account Information' tab for a user named 'Test User' (TU) with status 'Active'. The user's email is 'test_user@xxx.com'. The form includes fields for User Name, Prefix, First Name, Middle Name, Last Name, Suffix, Email, Recovery Email, Instant Messaging Address, Home Phone Number, Mobile Phone Number, Federated status (set to 'No'), and Authenticated By (set to 'Oracle Identity Cloud Service'). There is also a section for 'Work Information' with fields for Title, Street Address, City, Postal Code, Country, Time Zone, Preferred Language, and Work Phone Number. An 'Update User' button is visible in the top right corner of the form area.

5. You can manage the user groups assigned to users by selecting the Groups tab in the top menu and selecting the + Assign option to update user groups as shown in the following figure.

Figure 3–10 IDCS Assign User to Groups

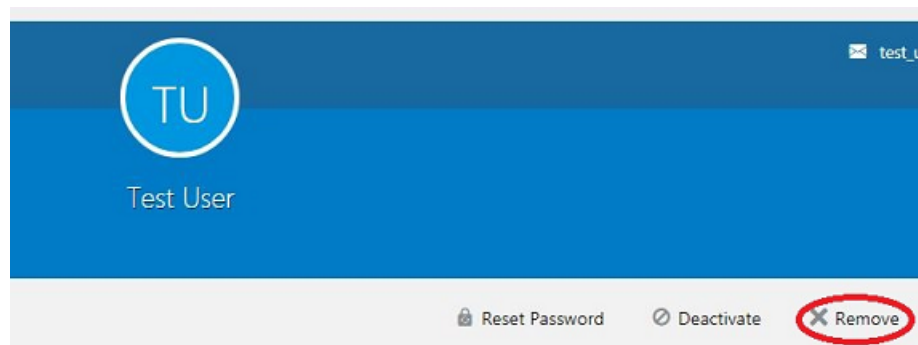
The screenshot shows the 'Groups' tab for the 'Test User' (TU). It displays a list of groups assigned to the user. At the top, there is a search bar, a 'Select All' checkbox, and '+ Assign' and 'X Revoke' buttons. A tooltip 'Assign groups to a user.' is visible. The list shows two groups: 'adminusers' with a purple icon containing 'AD' and 'edgeadminusers' with a purple icon containing 'ED'.

6. A user can be deactivated by selecting **Deactivate** and then confirming the selection in the confirmation dialog.

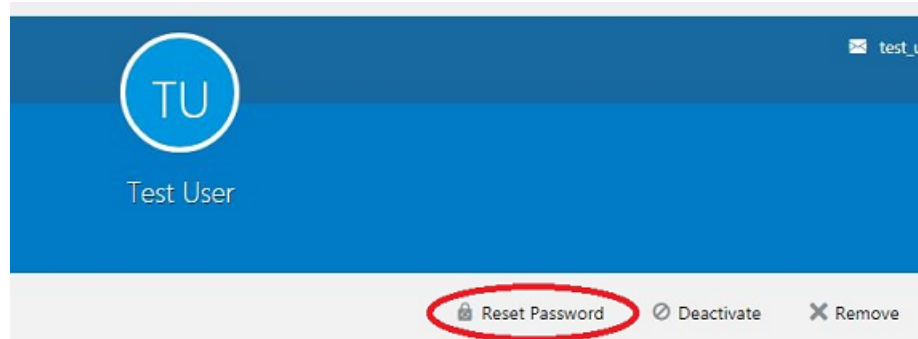
Figure 3–11 IDCS Deactivate User

7. A user can be deleted by selecting **Remove** and then confirming the selection in the confirmation dialog.

The same user also needs to be deleted from the Merchandise Financial Planning Cloud Service application. This will keep IDCS and the application synchronized. Complete the user deletion by following the steps for deleting a user in the User Maintenance chapter of the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Figure 3–12 IDCS Remove User

8. A user can be asked to reset their password by selecting **Reset Password** and then confirming the selection in the confirmation dialog. The associated user will get email with a link to reset the password.

Figure 3–13 IDCS Reset Password

Bulk Loading of User and User Groups from IDCS

The Administrator can bulk import user and user groups using comma-separated-values (CSV) files. For information on the bulk import of user and user groups from IDCS, see the Oracle Identity Cloud Service documentation at the following link: <https://cloud.oracle.com/identity/documentation>.

Hierarchy Maintenance

Hierarchy management in MFP Cloud Service can be primarily classified into two features provided by the RPASCE Platform:

- Hierarchy Maintenance
- Hierarchy Loading

Hierarchy Maintenance

The MFP Cloud Service Administrator can utilize the RPASCE capability to maintain user-named and user-defined dimensions within hierarchies. Per the business needs, the Administrator can create custom-made dimensions from Hierarchy Maintenance.

To illustrate the concept with an example, suppose the different classes of product by default hierarchy belong to different departments. By using the default hierarchy, the Administrator does not have the option to group different classes from different departments to put together into one logical grouping. Hierarchy Maintenance provides that power to the Administrator to put different classes into class groups (for example: A,B,C). This flexible grouping of classes can make it easier for the user to view information such as planning, replenishment, or measure analysis reports.

The Administrator needs to remember that any hierarchy in RPASCE can have user-defined dimensions within it as long as they are set up by the Administrator's company at the time of installation. The examples in this section refer to the product hierarchy, but other hierarchies can be maintained in the same way.

For detailed steps and a description for Hierarchy Maintenance, see the information on the Hierarchy Maintenance workbook in the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Hierarchy Loading

Loading of hierarchy position is one of the important regular tasks performed by the Administrator. Loading and refreshing of the hierarchy are made simple by the default RPAS OAT task Load Hierarchy Data (loadHier). The primary function of this task is to add, remove, and reclassify positions in the hierarchy. The loadHier task also supports the purging of data in parallel while loading new positions.

To manage the addition, removal, and reclassification of positions in a hierarchy, RPASCE uses a methodology called integer indexing. It is used to manage multidimensional data at the storage level. The loadHier task also provides a simple compression method that can skip duplicated values.

RPASCE supports loading of the hierarchy by multiple input files. The Administrator must load the extra input files along with the main input file.

The Load Hierarchy Data (loadHier) task supports comma-separated values (CSV) or fixed width flat files for loading. The load file requires a .dat file extension for flat files and a .csv.dat file extension for a CSV file.

The detailed steps and description for hierarchy loading are documented in the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Monitor Domain Performance

The MFP Cloud Service Administrator can use various tools provided by RPASCE OAT tasks to monitor domain performance. While the environment is live, RPASCE OAT tasks provide the Administrator great flexibility to control the domain from the MFP Cloud Service application front end.

The major tasks which can be useful for the Administrator in day to day activity to check on the domain are described in this chapter.

This chapter provides the name and overview about the tasks which are useful for monitoring/optimizing domain performance. The detailed steps and descriptions for the tasks are documented in the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

System Administration tasks:

- **Optimize Domain:** Optimize domain to improve performance and free up space.
- **Reindex Domain:** The Reindex Domain task is used to compress, increase, or decrease the set of physical address spaces (or indexes) of the multidimensional arrays.
- **Scan Domain:** The Scan Domain utility is a domain utility used for detecting data loss and repairing data corruption in an RPASCE database.
- **Fix Domain:** The Fix Domain utility is to detect different types of corruption that occur within a domain.

Additional System Administration task that can be helpful in gathering domain information:

- **Domain Information:** Provides miscellaneous details about a domain.

Service Request Administration tasks:

- **Start Oracle OS Watcher:** Start the Oracle OS Watcher to gather OS metrics for performance analysis.
- **Stop Oracle OS Watcher:** Stop the running of the Oracle OS Watcher.

Configured Batch task:

- **Clean up Task:** This task is provided to clean up the processed files or unprocessed files from different cloud service locations to be run by the retailer on an on-need basis.

Optimize Domain

The Optimize Domain utility is used to improve performance and minimize the space required by the domain data.

Because the RPASCE Btree dimension arrays undergo continuous updates and changes as a result of adding and deleting existing positions, over time, measure arrays become full of stale data. This stale data is created when positions are deleted, but the associated index remains. This results in wasted space and inefficient operations. The measure arrays containing any data for these positions must be updated to reflect these deletions. Deleting positions marks the hierarchy data for the corresponding dimensions as changed, but it does not clean up the associated data from the measure arrays. The Optimize Domain utility cleans this stale data from the measure arrays. For details about the Optimize Domain online administration tasks, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Reindex Domain

The Reindex Domain task is used to compress, increase, or decrease the set of physical address spaces (or indexes) of the multidimensional arrays. The process of compressing and defragmenting the physical IDs makes the domain load and run faster. The reindexing options let you reindex the entire domain, dimensions within a hierarchy, or a specified list of dimensions, and also prepend calendar dimension positions. For details about the Reindex Domain online administration tasks, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Scan Domain

The Scan Domain utility is a domain utility used for detecting data loss and repairing data corruption in an RPASCE database. Data loss occurs when an RPASCE process is abnormally terminated. This can happen when an external mechanism, such as a power failure, causes a sudden termination of an RPASCE process. Data loss can also occur due to an unexpected program breakdown.

Data corruption can occur if an external program modifies the RPASCE database files or an unforeseen defect occurs in the processes using the RPASCE database (an extremely rare event).

The Scan Domain utility can detect both corruption and data loss, but it can only fix corruption. This utility can operate on global, non-partitioned, and local domains. It supports parallelization when repairing databases in a domain.

For details about the Scan Domain online administration tasks, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Fix Domain

The Fix Domain online administration utility is used to detect many types of corruption that can occur within an RPASCE domain. This utility can be used to perform a number of tasks, which are described in this section. In all cases, Fix Domain can execute to perform an examination to detect problems. The following major tasks are performed by the Fix Domain task utility:

- Remove Inconsistent Measure Attributes
- Remove Partially Unregistered Measures
- Repair Discrepancies in Hierarchy Information
- Repair Unlinked Arrays

For details about the Fix Domain online administration tasks, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Domain Information

The Domain Information task is used to provide miscellaneous details about a domain, including type of domain (simple, master, subdomain, or local) and the upgrade and version history of the domain.

For details about the Domain Information online administration tasks, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Start Oracle OS Watcher

The Start Oracle OS Watcher task is used to collect OS performance metrics with user-specified parameters. When the task ends, the collected data is packaged in a tar file named as osw_archive_<timestamp>.tar. The collected data, along with other profile data or logs, is used to help Oracle Support diagnosis performance issues of the RPASCE applications.

For details about the Start Oracle OS Watcher online administration tasks, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Stop Oracle OS Watcher

The purpose of this task is to stop the running OS Watcher before its duration ends. When the Stop Oracle OS Watcher task starts, it will immediately stop the running OS Watcher task, and package the collected data in a tar file, the same way the Start Oracle OS Watcher task does at the end of its duration.

Clean up Task

This task is provided to clean up the processed files or unprocessed files from different cloud service locations to be run by the retailer on an on-need basis. This task has three options to select the locations to clean up when this task is scheduled.

For details about the Clean Up task, see ["Clean Up Task."](#)

Appendix: User Maintenance Using OIM

This appendix describes the process for managing users and roles with Oracle Identity Management (OIM). The Administrator can create users and assign the level of access as needed. This appendix describes how to create/modify/delete a user and assign roles to a user.

If your Merchandise Financial Planning Cloud Service is configured with Oracle Identity Management (OIM) for managing users and access, follow the instructions in this appendix.

In order to provide application access to end users, the Cloud Service Administrator needs to create the user's account from OIM. Follow the steps in ["OIM User Creation."](#)

To complete the user provisioning activity, the same user name must be added in the Merchandise Financial Planning Cloud Service application and assigned to a necessary group.

MFP Cloud Service is built with role-based access. Permissions are associated with roles. [Table 3-1](#) lists the available roles.

The Administrator can assign the above role or roles to the user. Follow the steps in ["Assigning Members to a Role."](#)

For detailed information on the tasks related to user and role, see the following sections:

- [User Maintenance through OIM:](#)
 - [OIM User Creation](#)
 - [Deleting a User or Disabling User Privileges](#)
 - [Resetting a User Password](#)
- [Role Maintenance through OIM:](#)
 - [Assigning Members to a Role](#)
 - [Revoking Role Membership](#)
 - [Approving Requests from a User for a Role](#)
 - [Approving Requests from a User for Multiple Roles](#)
- [User Maintenance through Oracle Support:](#)
 - [Importing a Batch of User Accounts](#)
- [Role Maintenance through Oracle Support:](#)
 - [Bulk Role Membership Update \(Optional\)](#)

User Maintenance through OIM

This section describes how to maintain users through OIM.

OIM User Creation

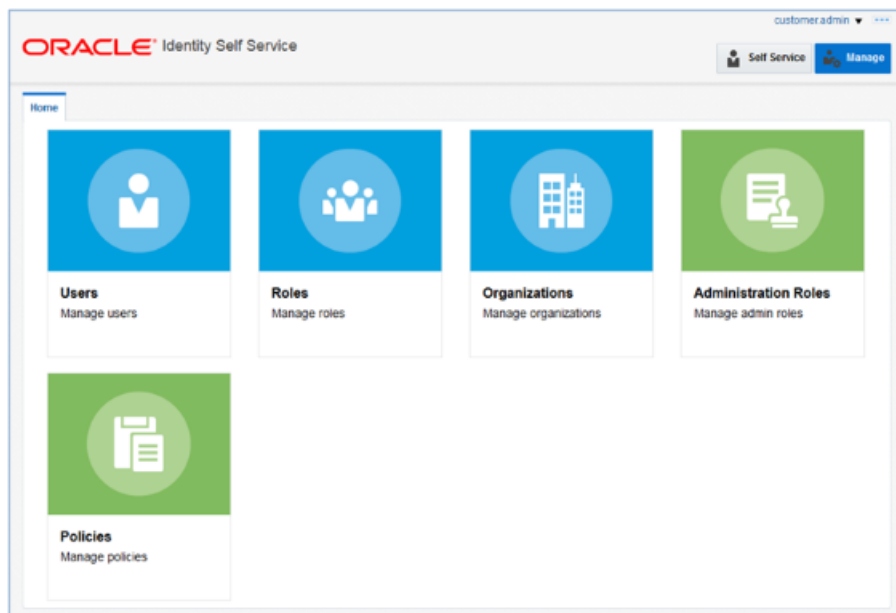
Before users can access the Oracle Retail Merchandise Financial Planning Cloud Service, it is necessary to provision access to the system for each user and to assign roles to each user to control what functionality will be available to the user. The access provisioning is done using OIM. Once user creation is done in OIM, the same user needs to be added in the Merchandise Financial Planning Cloud Service.

Note: The OIM Application URL and the login with the required administrator access are needed to perform the following steps. The welcome email sent by Oracle includes the URL.

The following steps explain how to define users, assign roles, and revoke access for users:

1. Log in to the OIM application.
2. Click **Manage Administration**.

Figure A–1 Identity Self Service Screen



3. Click **Users**.

Figure A–2 Users Screen



4. Under Actions, click **Create**. The Create User screen appears.

Figure A-3 Create User Screen

5. Under Basic Information, enter the following:

- First Name
- Last Name
- For Organization, enter Retail
- For User, enter Full Time Employee
- E-mail: E-mail address of employee

6. Under Account Settings, enter:

- User Login: <firstname>.<lastname>

Note: Oracle recommends that the User Login be entered in upper case.

- Password
- Confirm Password

Note: If two employees have the same first name and last name or if you want to reuse the user login of a user that was deleted earlier, use the middle name initial in between the user login. For example: <firstname>.x.<lastname>

7. Click **Submit**.

Note: The new user will not be able to log in to the application after Step 7. To fully complete the user creation, the same user needs to be added in the Merchandise Financial Planning Cloud Service as well. See Step 8.

- To complete the user creation, follow the steps for adding a user in the User Maintenance chapter of the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Note: The user name created in RPAS must exactly match the original case of the User Login entered in Step 6.

Deleting a User or Disabling User Privileges

OIM provides the Administrator a choice to delete or disable a non-active user. Delete will permanently delete all the details of the user, while disable will keep the entry of the user available, only barring its access rights.

To delete or disable a user:

- Log in to the OIM application.
- Under Administration, click **Users**.
- Select the user and click **Disable** or **Delete** as necessary.

Figure A-4 Users Screen

Display Name	User Login	First Name	Last Name	Organization	Tel No	E-mail	Identity Status	Access
customer admin user	CUSTOMER ADMIN	customer admin	user	Xelerte Users		rpas@oracle.com	Active	Unlock
OIM ADMIN	OIM ADMIN	OIM	ADMIN	Retail		oim-admin@orc...	Active	Unlock
test	OIM TEST	test	test	Retail		test-admin@orac...	Active	Unlock
Internal User	OIMINTERNAL	OIMINTERNAL		Xelerte Users			Active	Unlock
regularuser	REGULAR USER3	BI	kan1	Retail		agilva.s.sarav...	Active	Unlock
Test user1	TEST USER1	GA	Test1	Retail		noreply@orade.c...	Active	Unlock
Bi Bina Kanot	TEST USER5	Bi	Kanot	Retail		bina.kanot@orc...	Active	Unlock
bina kanth	TEST USER7	bina	kanth	Retail		bina.kanth@orac...	Active	Unlock
GA CE	TEST USER8	GA	CE	Retail		GA.CE@oracle.com	Active	Unlock
Weblogic User	WEBLOGIC	WEBLOGIC	WEBLOGIC	Xelerte Users			Active	Unlock
System Administrator	JELSYSADM	System	Administrator	Xelerte Users		donoreply@orac...	Active	Unlock
kanot Anid	ANID		ANID	Retail		kanot.Anid@orac...	Active	Unlock

Locking or unlocking a particular user can also be done from this same screen if needed.

- The same user also needs to be deleted from the MFP CS application. This will keep OIM and the application synchronized. Complete the user deletion by following the steps for deleting a user in the User Maintenance chapter of the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

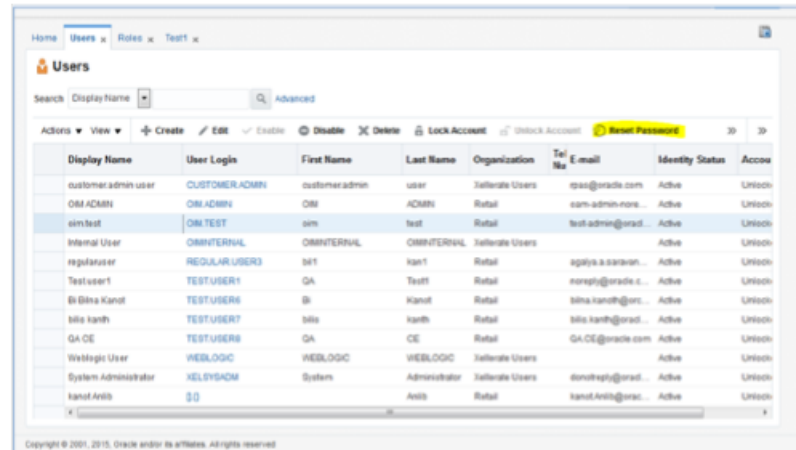
Resetting a User Password

To reset the password of a user:

- Log in to the OIM application.

2. Under Administration, click **Users**.
3. Click the **Search** tab and then select the user for which you want to reset the password.
4. Click **Reset Password**.

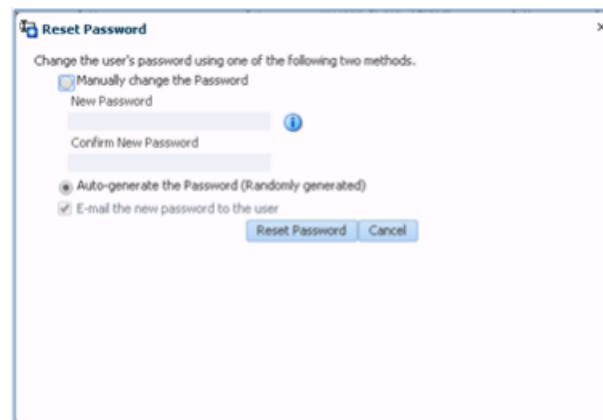
Figure A–5 Reset Password



5. In the Reset Password screen, make sure Auto-generate the Password is selected and click **Reset Password**. The system auto-generates the password and sends an email to the user.

If you want to set the password manually, click **Manually Change the Password**, update the new password, and then click **Reset Password**.

Figure A–6 Reset Password Dialog Box



6. To complete the password reset, follow the steps for editing a user in the User Maintenance chapter of the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*. This will keep OIM and the application synchronized.

Role Maintenance through OIM

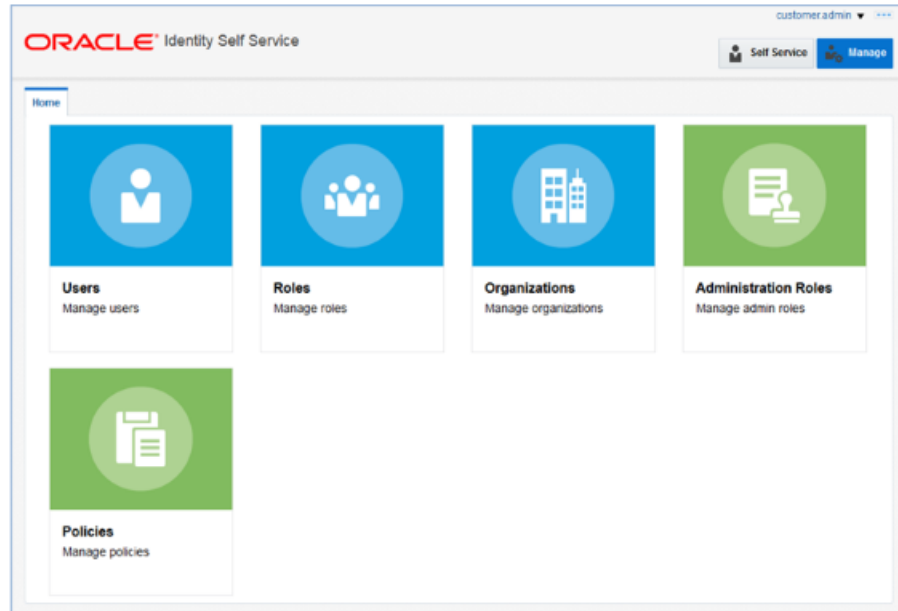
This section describes how to maintain roles through OIM.

Assigning Members to a Role

To assign members to a role:

1. Log in to the OIM application.

Figure A–7 Identity Self Service Screen



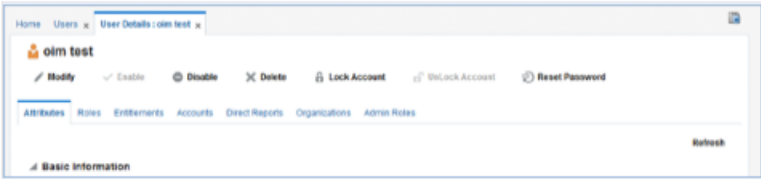
2. Click Users.
3. Click the user you want to select. In this example, oim.test is used.

Figure A–8 Users Screen

User Login	Display Name	First Name	Last Name	Organization	Telephone Number	E-mail	Identity Status	Account Status
CE-ADMIN1	ce admin1	ce	admin1	Retail		ce.admin1@ora...	Active	Unlocked
CE-ADMIN10	ce admin10	ce	admin10	Retail		ce.admin10@or...	Active	Unlocked
CE-ADMIN2	ce admin2	ce	admin2	Retail		ce.admin2@ora...	Active	Unlocked
CE-ADMIN3	ce admin3	ce	admin3	Retail		ce.admin3@ora...	Active	Unlocked
CE-ADMIN4	ce admin4	ce	admin4	Retail		ce.admin4@ora...	Active	Unlocked
CE-ADMIN5	ce admin5	ce	admin5	Retail		ce.admin5@ora...	Active	Unlocked
CE-ADMIN6	ce admin6	ce	admin6	Retail		ce.admin6@ora...	Active	Unlocked
CE-ADMIN7	ce admin7	ce	admin7	Retail		ce.admin7@ora...	Active	Unlocked
CE-ADMIN8	ce admin8	ce	admin8	Retail		ce.admin8@ora...	Active	Unlocked
CE-ADMIN9	ce admin9	ce	admin9	Retail		ce.admin9@ora...	Active	Unlocked
CE-TEST	ce test	ce	test	Retail		ce.test@oracle...	Active	Unlocked
CE-TEST3	ce test3	ce	test3	Retail		ce.test3@oracle...	Active	Unlocked
CUSTOMER-AD...	customer admin	customer	admin	Retail			Active	Unlocked
CUSTOMER-AD...	customer admin1	customer	admin1	Retail		customer.admin...	Active	Unlocked
CUSTOMER-AD...	customer admin2	customer	admin2	Retail			Active	Unlocked
OIM-TEST	oim test	oim	test	Retail		oim.test@orac...	Active	Unlocked

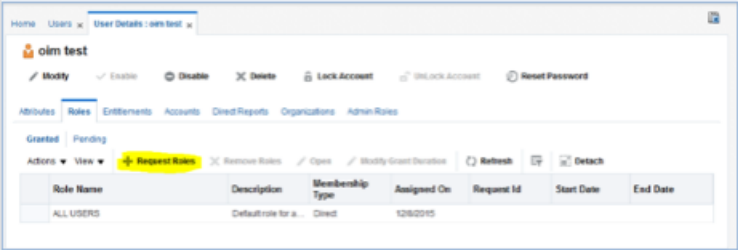
4. The User Details screen appears. Click the Roles tab.

Figure A–9 User Details Screen



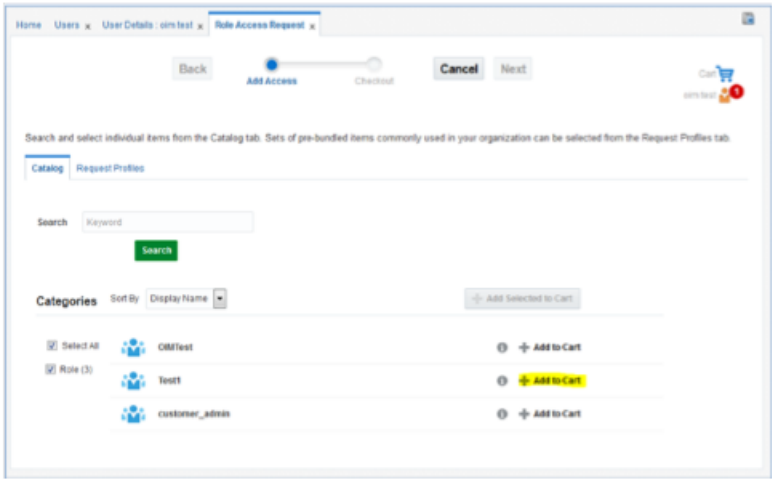
5. Click Request Roles.

Figure A–10 Roles Screen Request Roles List



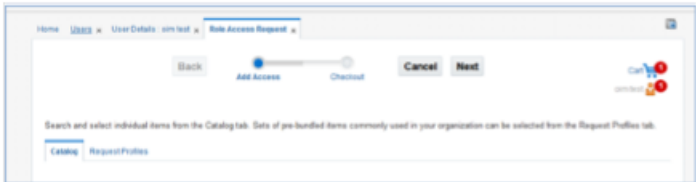
6. Click Add to Cart next to the role to assign.

Figure A–11 Role Access Request Screen



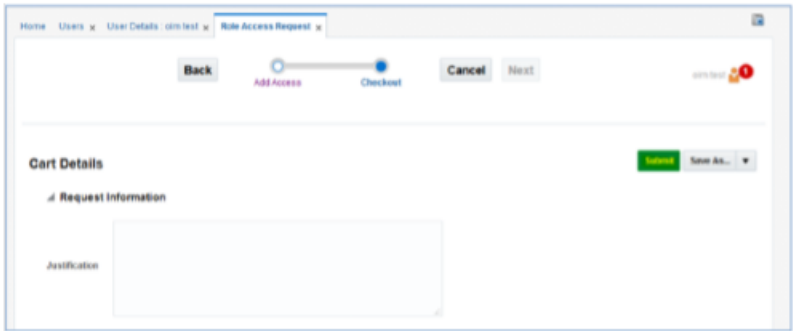
7. Click Next.

Figure A–12 Cart Options Screen



8. Click Submit.

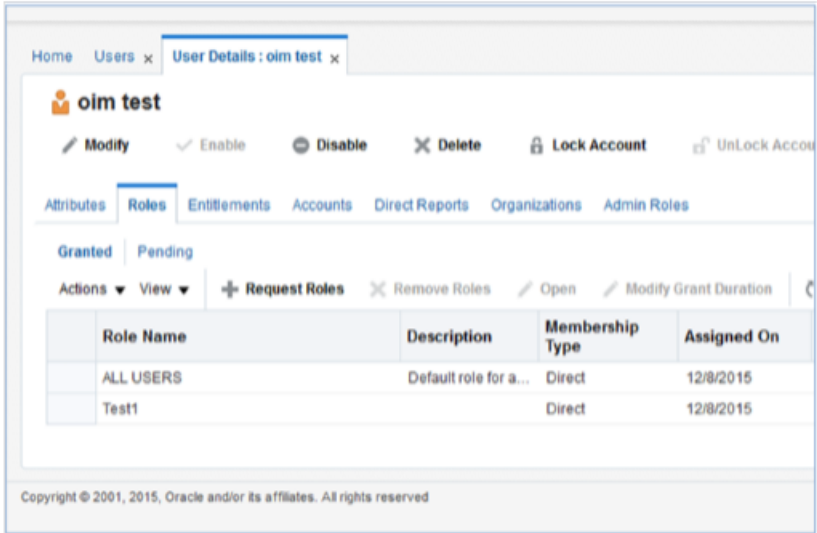
Figure A–13 Submit Option Screen



The role is assigned to the user.

9. On the User Details screen, click **Refresh**.

Figure A–14 User Details Screen



The assigned role is displayed.

Note: The Administrator needs to assign a similar User Group to the specific user in the MFP CS application domain as well to complete the role assignment.

For more information on User and User Group, see the information on adding a user and adding a user group in the User Maintenance chapter of the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Revoking Role Membership

To revoke the membership of a member in a role:

1. Log in to the OIM application.
2. Click **Users**.
3. Click the user you want to select. In this example, oim.test is used.

Figure A-15 Users Screen

User Login	Display Name	First Name	Last Name	Organization	Telephone Number	E-mail	Identity Status	Account Status
CE ADMIN1	ce admin1	ce	admin1	Retail		ce admin1@ora...	Active	Unlocked
CE ADMIN10	ce admin10	ce	admin10	Retail		ce admin10@or...	Active	Unlocked
CE ADMIN2	ce admin2	ce	admin2	Retail		ce admin2@ora...	Active	Unlocked
CE ADMIN3	ce admin3	ce	admin3	Retail		ce admin3@ora...	Active	Unlocked
CE ADMIN4	ce admin4	ce	admin4	Retail		ce admin4@ora...	Active	Unlocked
CE ADMIN5	ce admin5	ce	admin5	Retail		ce admin5@ora...	Active	Unlocked
CE ADMIN6	ce admin6	ce	admin6	Retail		ce admin6@ora...	Active	Unlocked
CE ADMIN7	ce admin7	ce	admin7	Retail		ce admin7@ora...	Active	Unlocked
CE ADMIN8	ce admin8	ce	admin8	Retail		ce admin8@ora...	Active	Unlocked
CE ADMIN9	ce admin9	ce	admin9	Retail		ce admin9@ora...	Active	Unlocked
CE TEST	ce test	ce	test	Retail		ce test@orac...	Active	Unlocked
CE TEST3	ce test3	ce	test3	Retail		ce test3@orac...	Active	Unlocked
CUSTOMER AD...	customer admin	customer	admin	Retail			Active	Unlocked
CUSTOMER AD...	customer admin1	customer	admin1	Retail		customer.admi...	Active	Unlocked
CUSTOMER AD...	customer admin2	customer	admin2	Retail			Active	Unlocked
oim test	oim test	oim	test	Retail		oim test@orac...	Active	Unlocked

4. The User Details screen appears. Click the Roles tab.

Figure A-16 User Details Screen

Role Name	Description	Membership Type	Assigned On	Request Id	Start Date	End Date
ALL USERS	Default role for a...	Direct	12/8/2015			

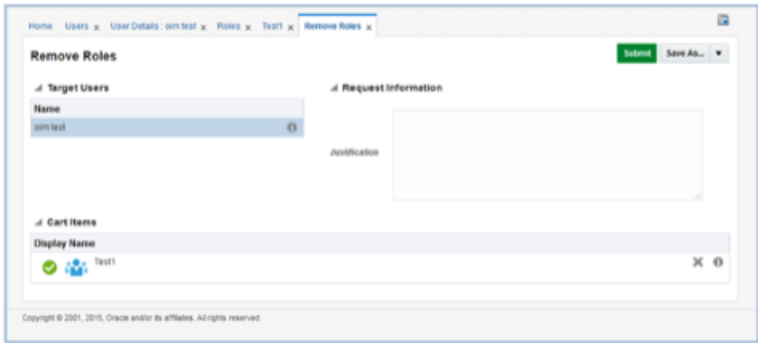
5. Select the role you want to revoke and click **Remove Roles**.

Figure A-17 Revoke Roles Option

Role Name	Description	Membership Type
ALL USERS	Default role for a...	Direct
Test1		Direct

6. In the next section, click **Submit**.

Figure A–18 Remove Roles Submit Option

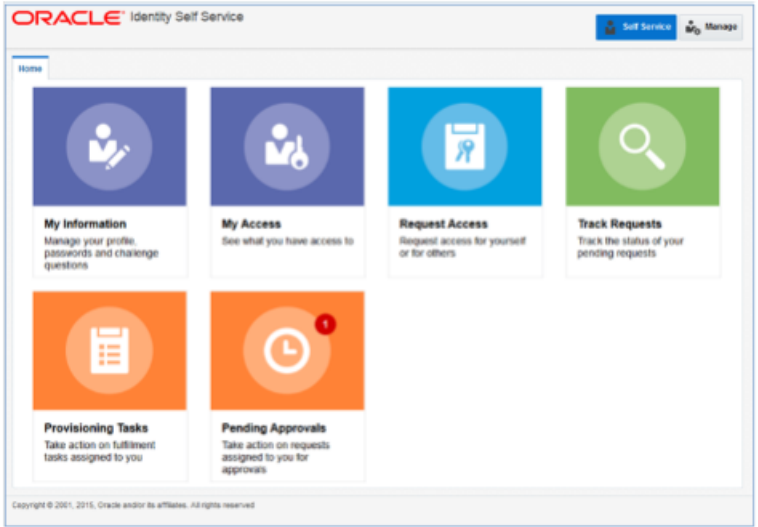


Approving Requests from a User for a Role

Users can also request roles that are available for the users to access the MFP Service (or ask to revoke them). To approve the request from a user:

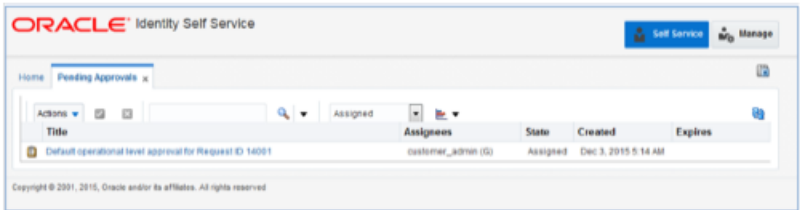
- 1. Log in to the OIM application.
- 2. Click Pending Approvals.

Figure A–19 Identity Self Service Screen with Pending Approvals

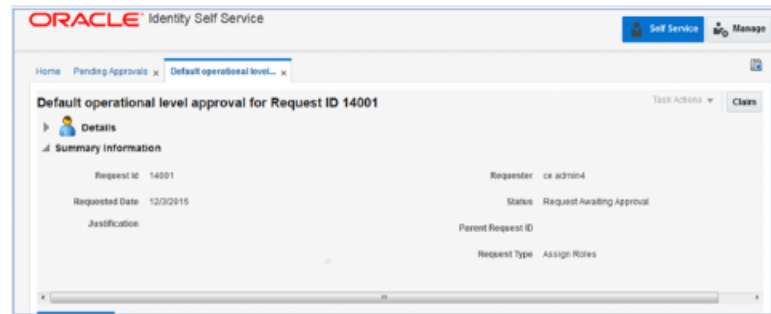


- 3. Click the action assigned to you.

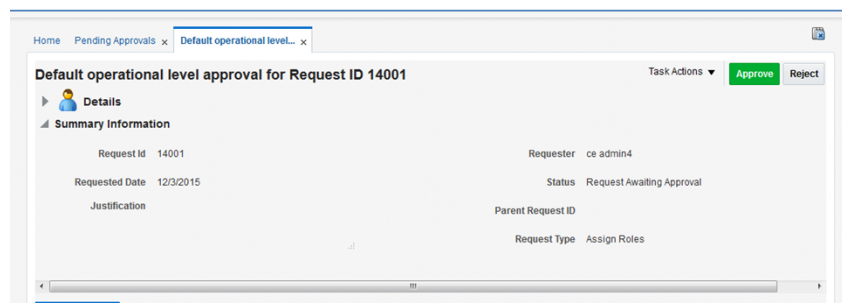
Figure A–20 Pending Approvals Tab



- 4. Click Claim.

Figure A–21 Pending Claim Summary Information

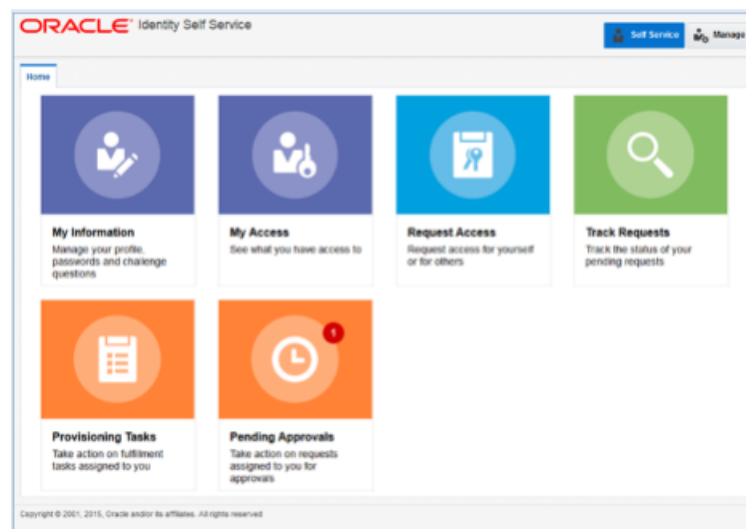
5. Click **Approve** or **Reject**. The request completes.

Figure A–22 Pending Approval Summary Information

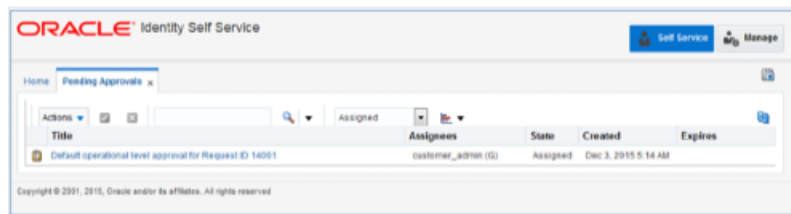
Approving Requests from a User for Multiple Roles

Users can also request multiple roles that are available for the users to access the MFP Service (or ask to revoke them). To approve the request from a user:

1. Log in to the OIM application.
2. Click **Pending Approvals**.

Figure A–23 Identity Self Service Screen with Pending Approvals

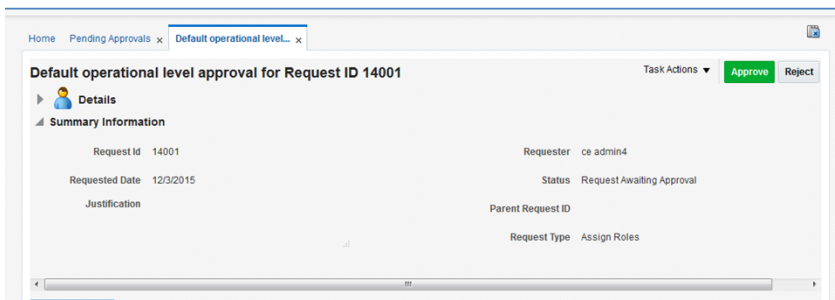
3. Click the action assigned to you.

Figure A–24 Pending Approvals Tab

4. Click **Claim**.

Figure A–25 Pending Claim Summary Information

5. Click **Approve** or **Reject**.

Figure A–26 Pending Approval Summary Information

6. Once done, if approved, the request is split into multiple requests, one for each role for each user. Approve all of them by following Steps 3 to 5.
7. Once all the requests are approved, all the roles are assigned to the users.

Note: The Administrator can request multiple roles for multiple users. Once the request is made, the Administrator is required to approve the request using the Approve Requests from User for Multiple Roles process.

User Maintenance through Oracle Support

This section describes how to maintain users through Oracle Support.

Importing a Batch of User Accounts

If a large number of users must be created, the Oracle team can bulk load the users into the OIM application. When users are bulk loaded, each initial password is set to the current password of a template user. The new users are required to change the password on their first login.

To request the creation of accounts by bulk loading:

1. Create a CSV file listing all users to create. Following is an example of this file.

```
#####
filename.csv
#####
#####
USR_LOGIN,USR_FIRST_NAME,USR_LAST_NAME,USR_EMAIL,ORG_NAME
ce.admin1,ce,admin1,ce.admin1@oracle.com,Retail
ce.admin2,ce,admin2,ce.admin2@oracle.com,Retail
ce.admin3,ce,admin3,ce.admin3@oracle.com,Retail
ce.admin4,ce,admin4,ce.admin4@oracle.com,Retail
ce.admin5,ce,admin5,ce.admin5@oracle.com,Retail
ce.admin6,ce,admin6,ce.admin6@oracle.com,Retail
ce.admin7,ce,admin7,ce.admin7@oracle.com,Retail
ce.admin8,ce,admin8,ce.admin8@oracle.com,Retail
ce.admin9,ce,admin9,ce.admin9@oracle.com,Retail
ce.admin10,ce,admin10,ce.admin10@oracle.com,Retail
#####
```

2. Create or identify a user whose password will be used as the initial password for all the created users.
3. Open an SR with Oracle Support and provide the CSV file and user from Steps 1 and 2. For more information, see ["Oracle Support."](#)

Note: The new user will not be able to log in to the application after Step 3. To fully complete the user creation, the same user needs to be added in the MFP CS application as well. To complete the user creation, see Step 4.

4. To complete the user creation, follow the steps for adding a user in the User Maintenance chapter of the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Note: The user name created in RPAS must exactly match the original case of the User Login entered in Step 1.

Role Maintenance through Oracle Support

This section describes how to maintain roles through Oracle Support.

Bulk Role Membership Update (Optional)

If a considerable number of users need to have roles to be assigned, the Oracle team can bulk update the role membership into the OIM application. However, Oracle recommends that a customer administrator use the Identity Management application to do these assignments.

To update the membership by bulk update:

1. Create a CSV file with the user role mapping. Note that the user name must be in upper case. See the following example:

```
#####
role.csv
#####
#####
UGP_NAME,USR_LOGIN
Role1,CE.ADMIN1
Role1,CE.ADMIN2
Role3,CE.ADMIN3
Role4,CE.ADMIN4
Role5,CE.ADMIN5
Role6,CE.ADMIN6
Role7,CE.ADMIN7
Role8,CE.ADMIN8
Role2,CE.ADMIN8
Role2,CE.ADMIN9
#####
```

2. Open an SR with Oracle Support and provide the CSV file and user name from Step 1.

Note: If more than one role is to be attached to a particular user, add one more row with the role that the user is to have and the user name. Refer to the CE.ADMIN8 in the above example. The CE.ADMIN8 has both Role 8 and Role 2.
