

Oracle® Retail Merchandising Cloud Services

Administration Guide

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Oracle® Retail Merchandising Cloud Services Administration Guide, Release 16.0.024

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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Preface

This guide describes the administration tasks for Oracle Retail Merchandising Cloud Services.

Audience

This guide is intended for administrators.

This guide describes the administration tasks for Oracle Retail Merchandising Cloud Services.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

<https://support.oracle.com>

When contacting Customer Support, please provide the following:

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

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times not be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

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

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

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 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.

Administrative Tasks

This chapter describes the processes for maintaining users and roles as well as batch processes. For information regarding standard end user activities like creating and viewing reports, please see the *Oracle Retail Merchandising Cloud Services User Guide*.

Oracle Support

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

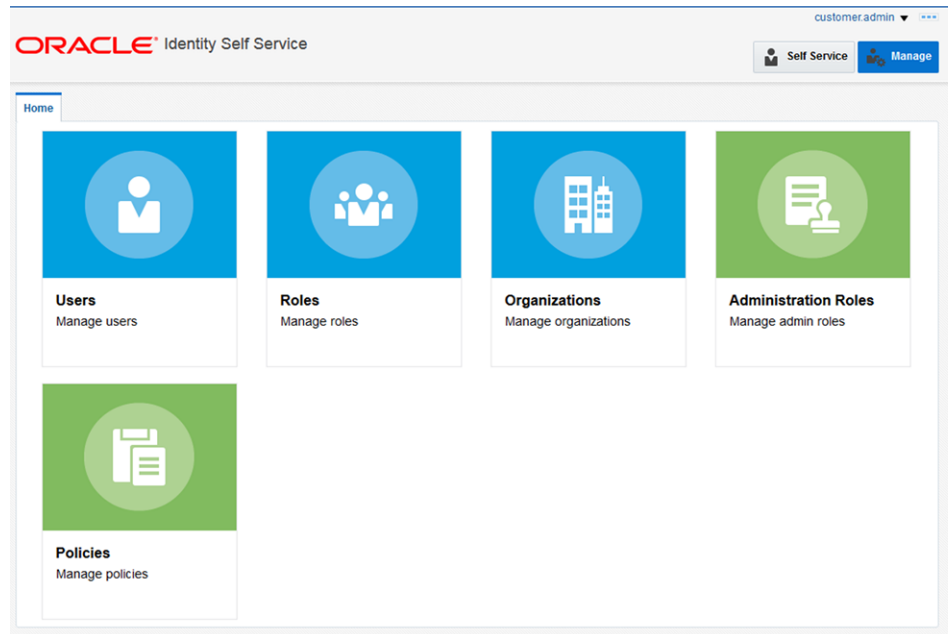
The link to use when submitting Service Requests (SR) is:

<https://support.oracle.com>

User Creation

Before users can access the Oracle Retail Merchandising Cloud Services applications it is necessary to provision each user access to the system, and assign roles to each user to control what functionality will be available to them. The access provisioning is done using Oracle Identity Management (OIM). The following steps explain how to define users, assign roles and revoke access for users when needed. The OIM Application URL and the login with the required administrator access would be needed to execute the below steps:

1. Log into the OIM application.
2. Under Administration, click **Users**.

Figure 1–1 Select Users

3. Under Actions, click **Create**.

Figure 1–2 Select Create

The Create User screen opens.

4. Under Basic Information, enter the following:
 - First Name
 - Last Name
 - For Organization, enter *Retail*
 - For User Type, enter *Full time employee*
 - For E-mail, enter the e-mail address of the employee
5. Under Account Settings, enter the following:
 - User Login: <firstname>.<lastname>
 - Password, enter a password
 - Confirm Password, reenter the password

Figure 1–3 Complete User Information

Create User

Request Information

Effective Date

Justification

Basic Information

* First Name

Middle Name

* Last Name

* E-mail

Manager

* Organization

* User Type

Display Name

Account Settings

User Login

Password

* Confirm Password

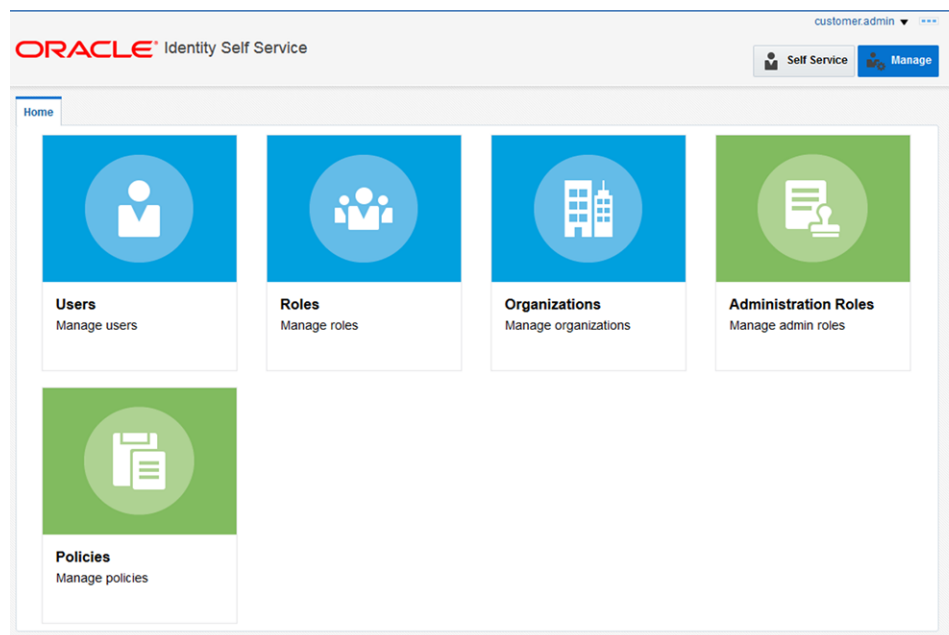
Buttons: Submit, Save As..., Cancel

6. Click **Submit**.

Assigning Members to a Role

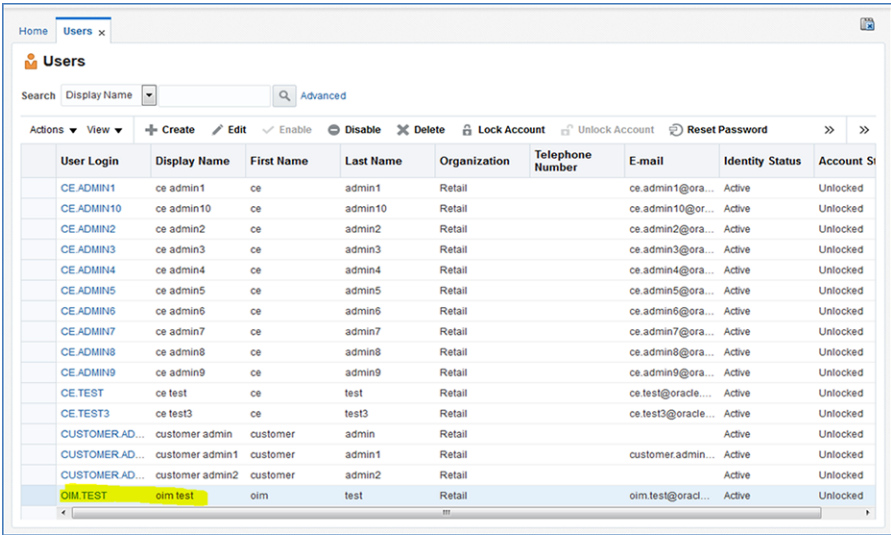
To assign members to a role, complete the following:

1. Log into the OIM application.
2. Click **Users**.

Figure 1–4 Select Users

3. Click the oim.test user.

Figure 1–5 oim.test User

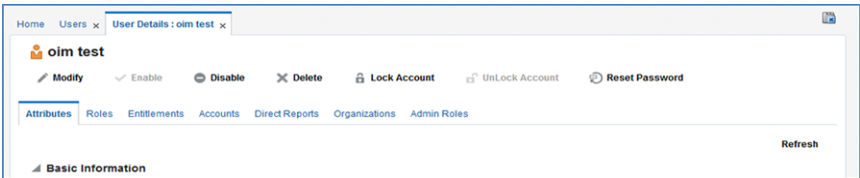


The screenshot shows the 'Users' management page in Oracle. It includes a search bar, a table of users, and various action buttons. The 'oim.test' user is highlighted in blue.

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. Click the Roles tab.

Figure 1–6 Roles Tab



The screenshot shows the 'User Details' page for 'oim.test'. The 'Roles' tab is selected, and the 'Basic Information' section is visible.

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

Figure 1–8 Adding Roles to the Cart

Home Users x User Details : oim test x Role Access Request x

Back Add Access Checkout Cancel Next

Cart oim test 1

Search and select individual items from the Catalog tab. Sets of pre-bundled items commonly used in your organization can be selected from the Request Profiles tab.

Catalog Request Profiles

Search Keyword Search

Categories Sort By Display Name Add Selected to Cart

☒ Select All	OIMTest	Info Add to Cart
☒ Role (3)	Test1	Info Add to Cart
	customer_admin	Info Add to Cart

7. Click Next.

Figure 1–9 Add Access Request

Home Users x User Details : oim test x Role Access Request x

Back Add Access Checkout Cancel Next

Cart oim test 1

Search and select individual items from the Catalog tab. Sets of pre-bundled items commonly used in your organization can be selected from the Request Profiles tab.

Catalog Request Profiles

Search Keyword Search

Categories Sort By Display Name Add Selected to Cart

☒ Select All	OIMTest	Info Add to Cart
☒ Role (3)	Test1	Info Add to Cart
	customer_admin	Info Add to Cart

8. Click Submit.

Figure 1–10 Submit Access Request

Home Users x User Details : oim test x Role Access Request x

Back Add Access Checkout Cancel Next

Cart oim test 1

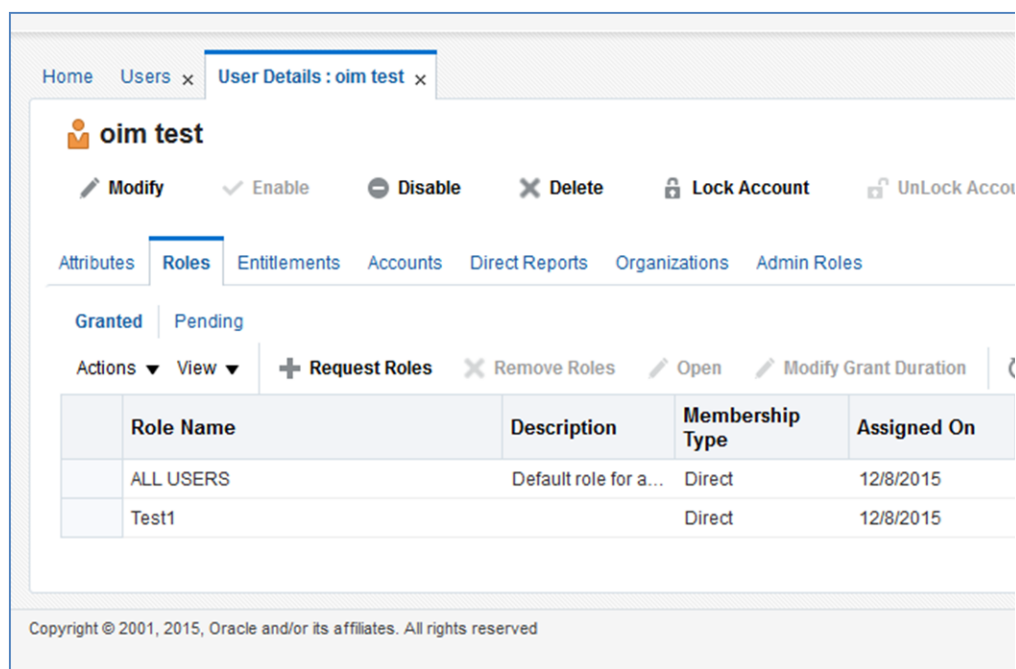
Cart Details

Request Information

Justification

Submit Save As...

The role is now assigned to the User.

Figure 1–11 User Details

Retail Merchandising System (RMS) Security Implementation

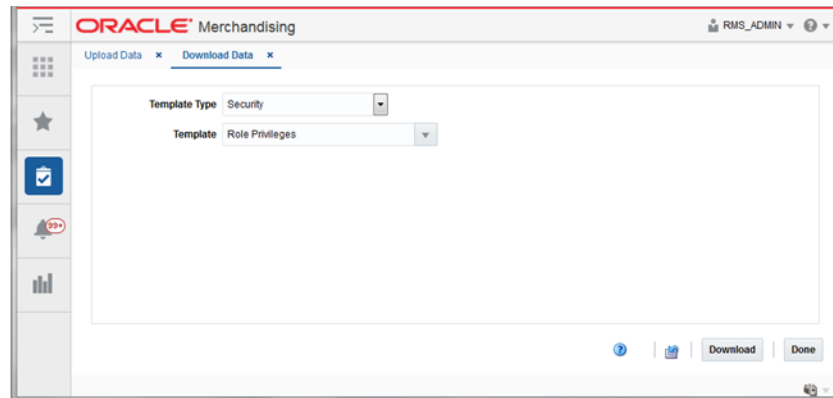
If Data Level Security is enabled in RMS then for the users to have access to the data, the below must be setup through the Data Upload Utility available in the RMS application:

- Role Privileges
- Security Group Attribute
- Security User and Security User Role
- Security User and Security Group mapping information
- Merchandise Hierarchy LOV filtering access information

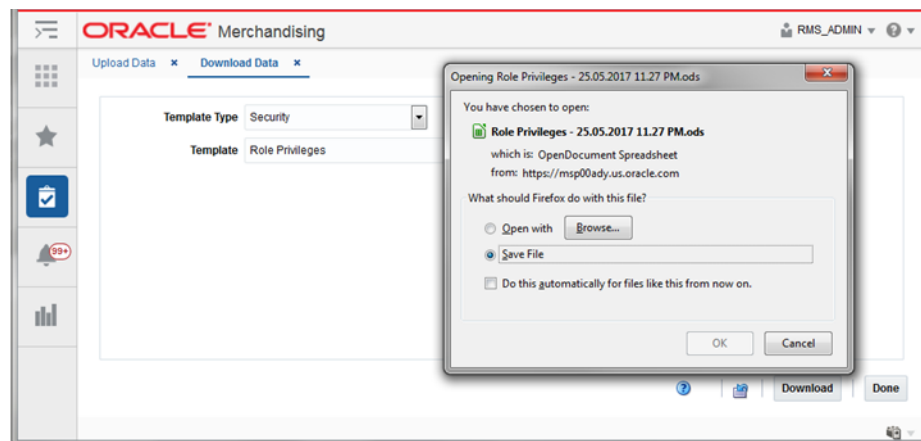
Setup Role Privileges

The setup of role privileges is required for purchase order approval.

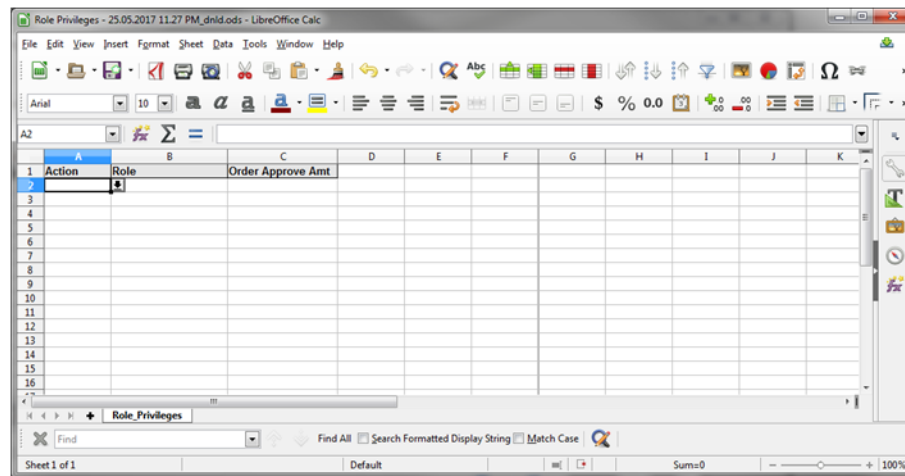
1. Log into the RMS Application.
2. Navigate to Foundation Data > Data Loading > Download.
3. In the Download Data screen, select:
 - Template Type as 'Security'
 - Template as 'Role Privileges'

Figure 1–12 Download Security Privileges Template Spreadsheet

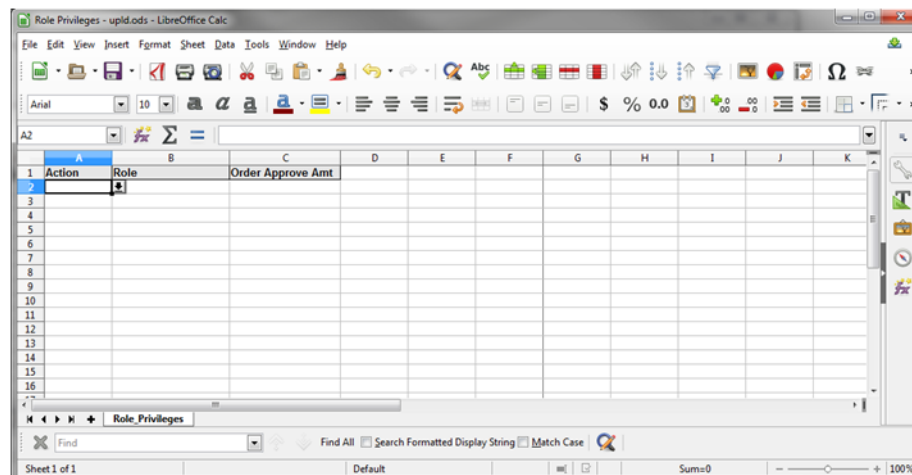
4. Click the **Download** button.
5. Save File to the local directory location when prompted.

Figure 1–13 Save File

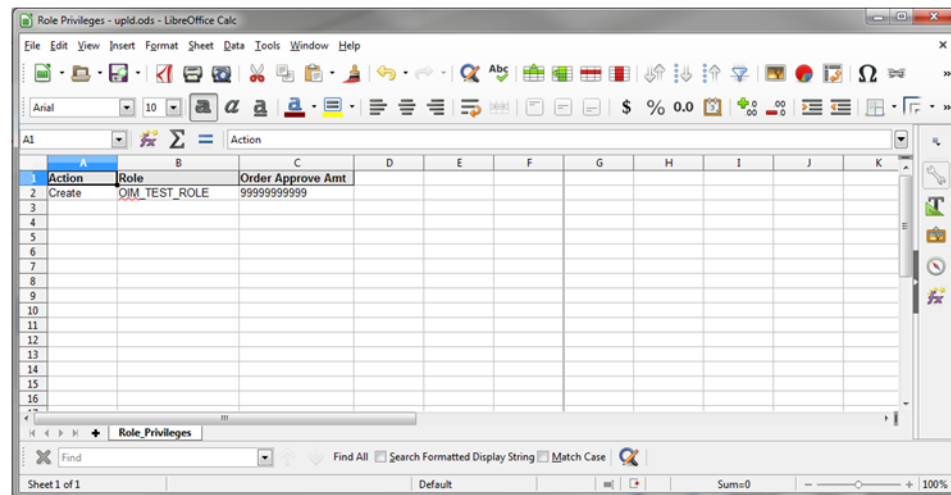
6. Click the **Done** button.
7. Open the downloaded file.

Figure 1–14 Open File

8. Save As < file name>.

Figure 1–15 Save as <File Name>

9. In the Security_Groups tab, enter/select the following:
 - Action: 'Create'
 - Role: <Role>
 - Order Approve Amt: < Upper limit that the role will be able to approve on an order

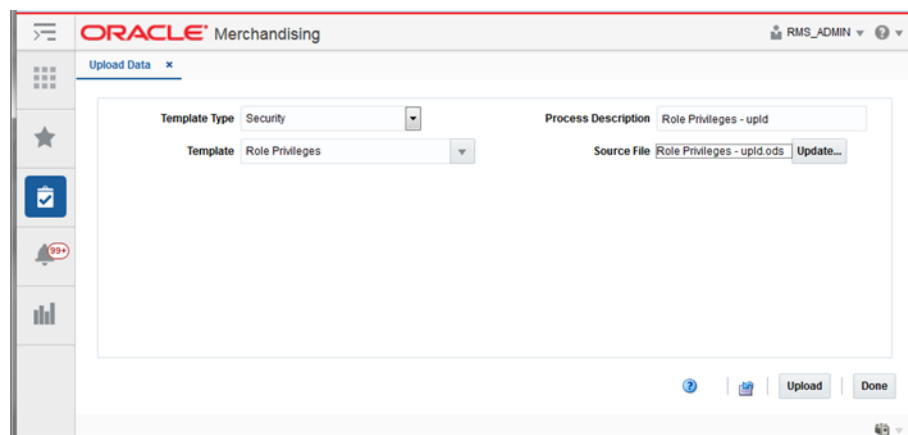
Figure 1–16 Enter Role Privileges information

10. Save and Close the file.

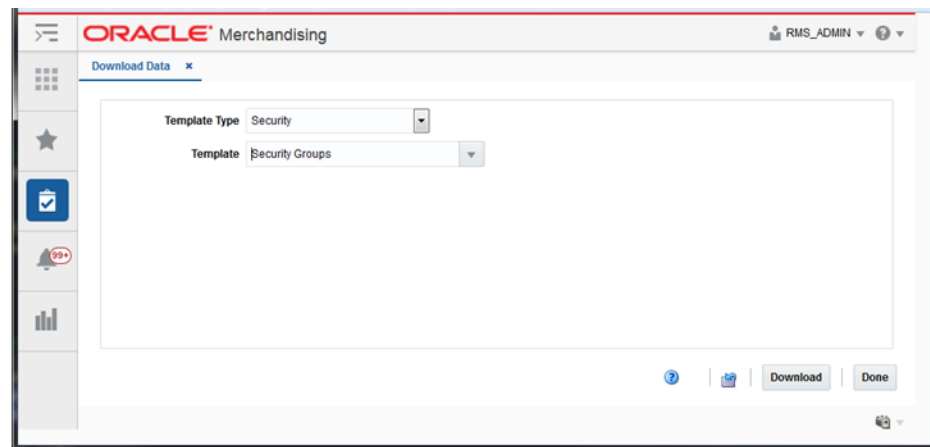
11. In the RMS Application, navigate to Foundation Data > Data Loading > Upload.

12. In the Upload Data screen, select:

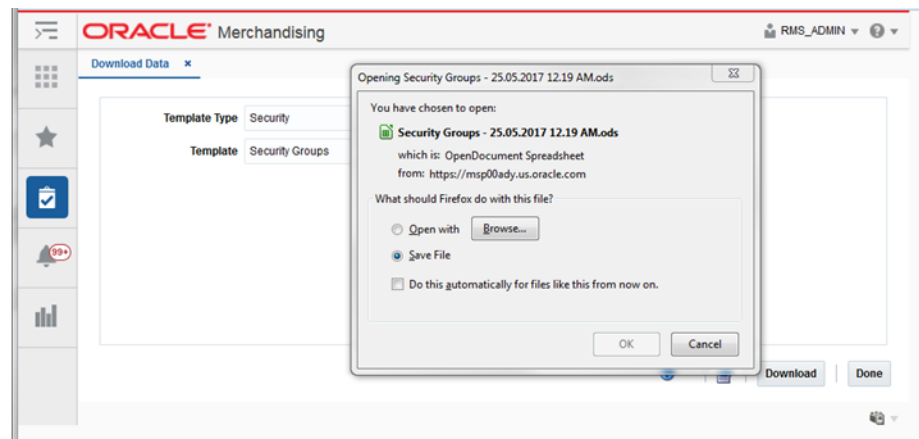
- Template Type as 'Security'
- Template as 'Role Privileges'
- Enter new Process Description or retain as is
- Browse and select the Source file that was created in Step 10

Figure 1–17 Upload Role Privileges Information

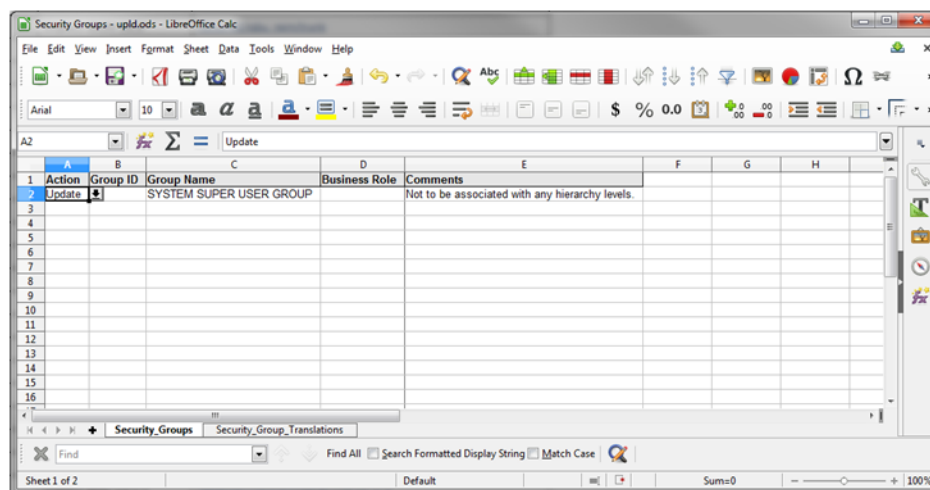
13. Click the **Upload** button.

Figure 1–20 Download Security Groups Template Spreadsheet

3. Click the **Download** button.
4. Save File to a local directory location when prompted.

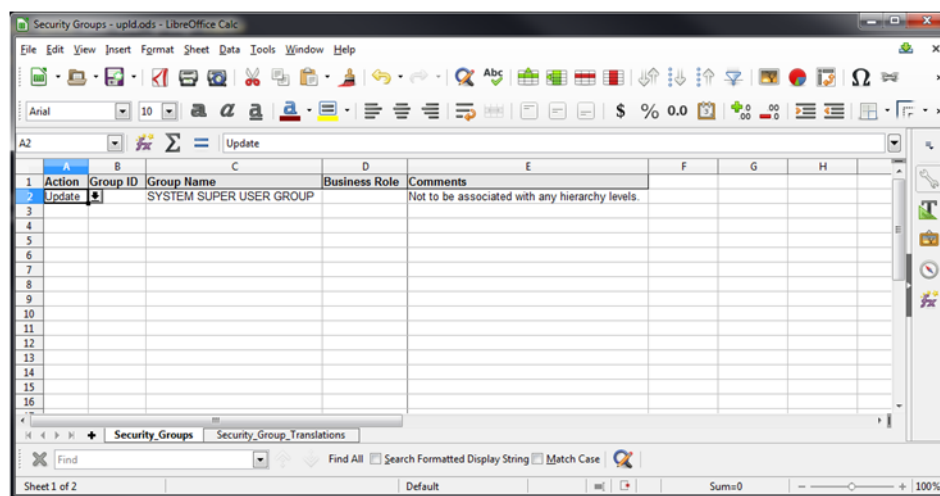
Figure 1–21 Save File

5. Click the **Done** button.
6. Open the downloaded file.

Figure 1–22 Open File

Note: The application User IDs can be mapped to the seeded Security Group (for example, SYSTEM SUPER USER GROUP) or new Security Groups can be defined. In order to define new Security Groups follow below steps.

7. Save As < file name>.

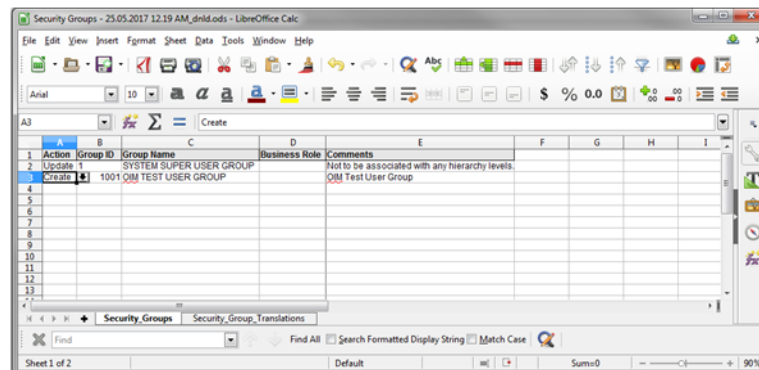
Figure 1–23 Save as <File Name>

8. In the Security_Groups tab, enter/select the following:

- Action: 'Create'
- Group ID: <Group ID>
- Group Name: <Group Name>
- Business Role: <role> (optional)
- Comments: <comments> (optional)

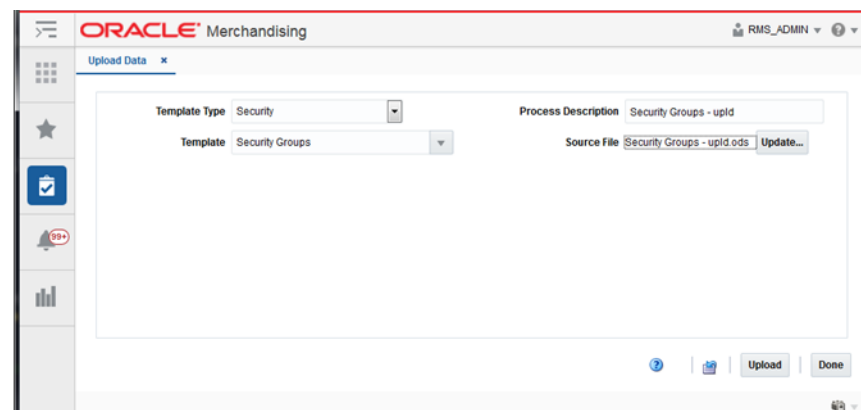
9. In the Security_Groups_Translations tab, enter the translated Security Group descriptions (optional).

Figure 1–24 Enter Security Groups information

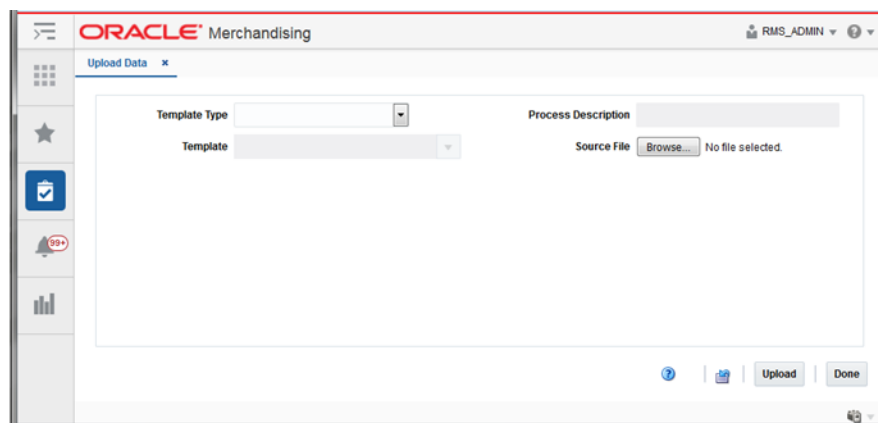


10. Save and Close the file.
11. In the RMS Application, navigate to Foundation Data > Data Loading > Upload.
12. In the Upload Data screen, select:
 - Template Type as 'Security'
 - Template as 'Security Groups'
 - Enter new Process Description or retain as is
 - Browse and select the Source file that was created in Step 10

Figure 1–25 Upload Security Groups Information



13. Click the **Upload** button.

Figure 1–26 Upload Security Group Information Complete

14. Click the **Done** button.
15. View the newly created Security Group by downloading the Security Groups spreadsheet (Steps 1 - 6).

Figure 1–27 View newly created Security Group

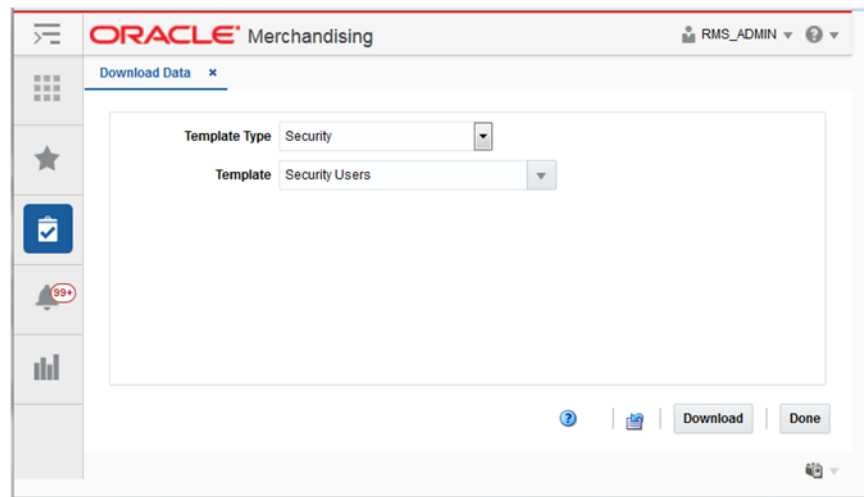
Action	Group ID	Group Name	Business Role	Comments
Update 1		SYSTEM SUPER USER GROUP		Not to be associated with any hierarchy levels.
Update 1001		OIM TEST USER GROUP		OIM Test User Group

Note: The system generated Group ID. This Group ID should be mapped to the Security Users.

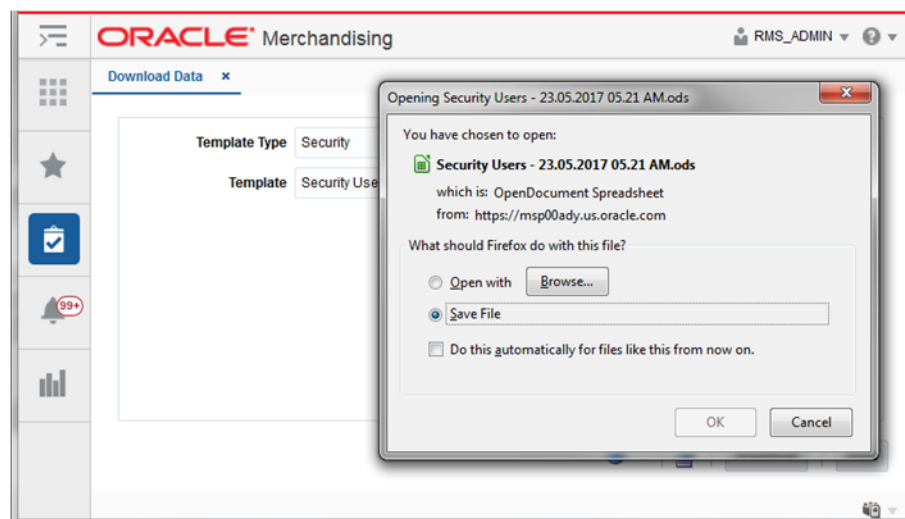
Setup Security User and Security User Role

The LDAP User ID used to login to the RMS application must be defined as a Security User.

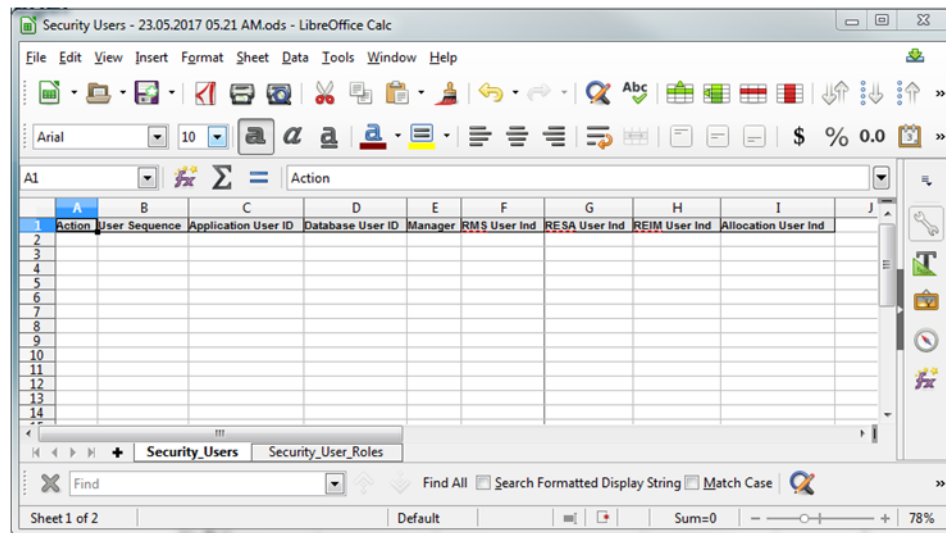
1. Navigate to Foundation Data > Data Loading > Download.
2. In the Download Data screen, select Template Type as 'Security' and Template as 'Security Users'.

Figure 1–28 Download Security Users template spreadsheet

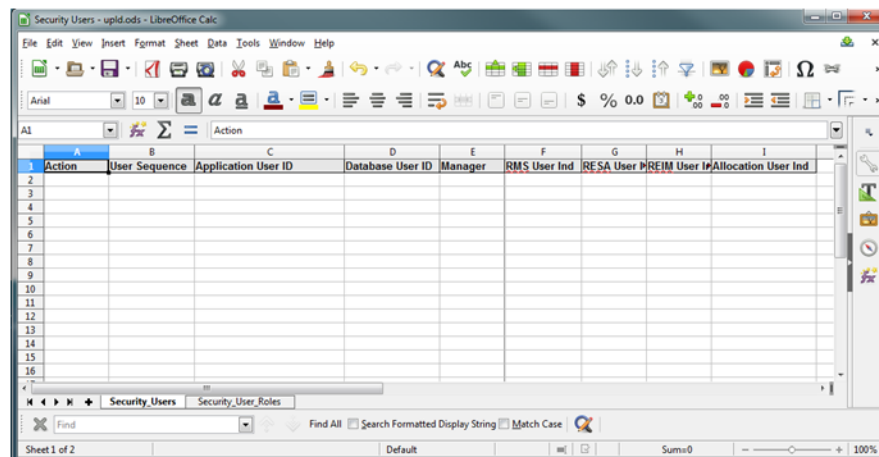
3. Click the **Download** button.
4. Save File to local directory location when prompted.

Figure 1–29 Save File

5. Click the **Done** button.
6. Open the downloaded file.

Figure 1–30 Open File

7. Save As < file name>.

Figure 1–31 Save as <File Name>

8. In the Security_Users tab, enter/select the following:

- Action: 'Create'
- User Sequence: <number>
- Application User ID: <Application User ID>
- RMS User Ind: Yes
- ReSA User Ind: Yes/No
- ReIM User Ind: Yes/No
- Allocation User Ind: Yes/No

Figure 1–32 Security Users Information

	A	B	C	D	E	F	G	H	I
	Action	User Sequence	Application User ID	Database User ID	Manager	RMS User Ind	RE SA User	PREIM User	Allocation
2	Create	15001	OIM TEST			Yes	No	No	No
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									

9. In the Security_User_Roles tab, enter/select the following:

Note: Proceed to set up Security User Role, only if Role Privileges have

- Template as 'Security Users'
- Enter Process Description or retain as is
- Browse and select the Source file that was created in Step 10

Figure 1–34 Upload Security Users Information

The screenshot shows the 'Oracle Merchandising' application window with the 'Upload Data' tab selected. The interface includes a sidebar with navigation icons (grid, star, checkmark, bell with '99+', and bar chart). The main content area has the following fields: 'Template Type' set to 'Security', 'Template' set to 'Security Users', 'Process Description' set to 'Security Users - Upd', and 'Source File' set to 'Security Users - upld ods'. An 'Update...' button is next to the Source File field. At the bottom right, there are 'Upload' and 'Done' buttons.

13. Click the **Upload** button.

Figure 1–35 Upload Security Users Information Complete

The screenshot shows the 'Oracle Merchandising' application window with the 'Upload Data' tab. The 'Template Type' and 'Template' fields are now empty. The 'Process Description' field is empty, and the 'Source File' field shows a 'Browse...' button and the text 'No file selected.'. The 'Upload' and 'Done' buttons are still present at the bottom right.

14. Click the **Done** button.
15. View the newly created Security User and Security User Role by downloading the Security Users spreadsheet (Steps 1 - 6).

Figure 1–36 View newly created Security User and Security Role Mapping information

Action	User Sequence	Application	Database	Manager	RMS User	In	RESA User	PREIM User	In	Allocation User	Ind
Update	15001	OIM TEST			Yes	No	No	No	No		

Figure 1–37 View newly created Security User Role mapping information

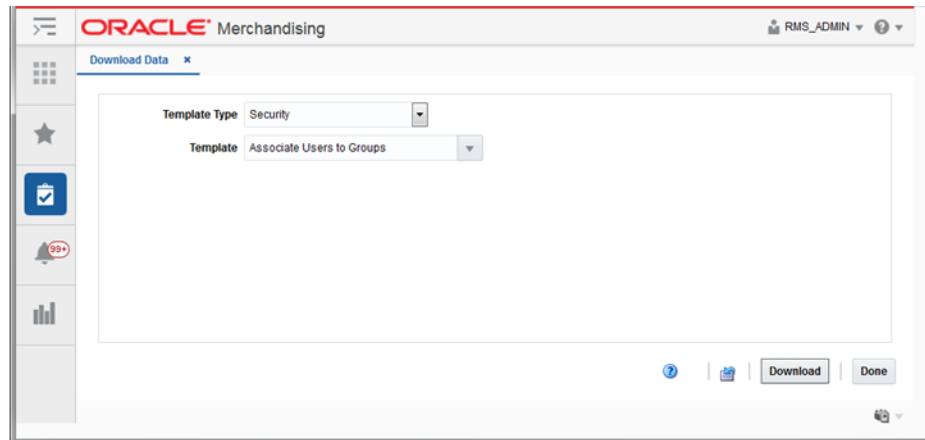
Action	User Sequence	Role
Update	15001	OIM_TEST_ROLE

Note the system generated User Sequence. This Security User (User Sequence) will be mapped to the Security Group.

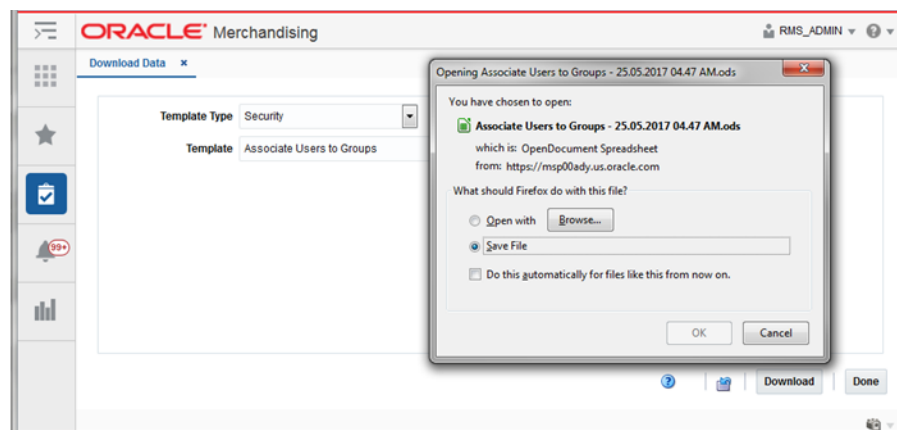
Map Security User with Security Group

The security user must be assigned to a security group. This is achieved by associating the User Sequence assigned to the Application User ID with a Security User Group.

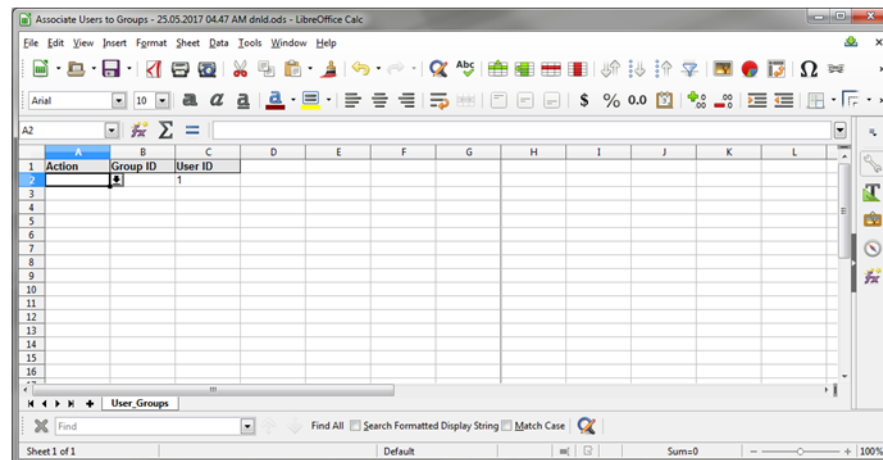
1. Navigate to Foundation Data > Data Loading > Download.
2. In the Download Data screen, select Template Type as 'Security' and Template as 'Associate Users to Groups'.

Figure 1–38 Download Associate User to Groups Template Spreadsheet

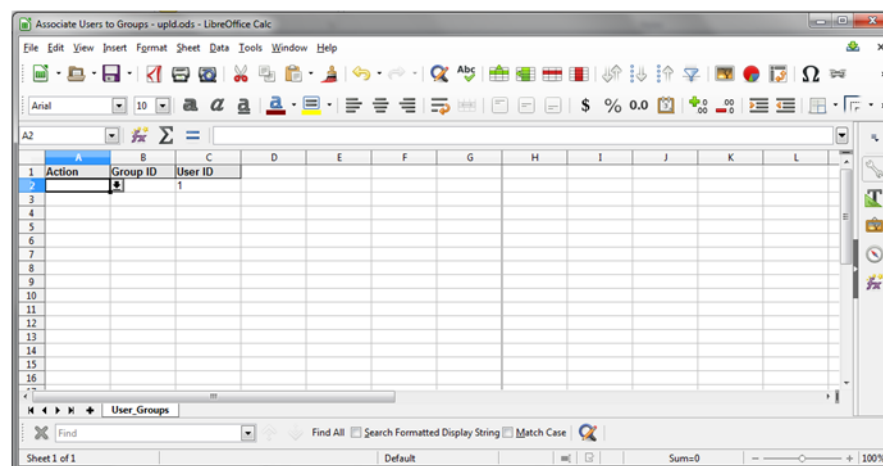
3. Click the **Download** button.
4. Save the file to a local directory location when prompted.

Figure 1–39 Save File

5. Click the **Done** button.
6. Open the downloaded file.

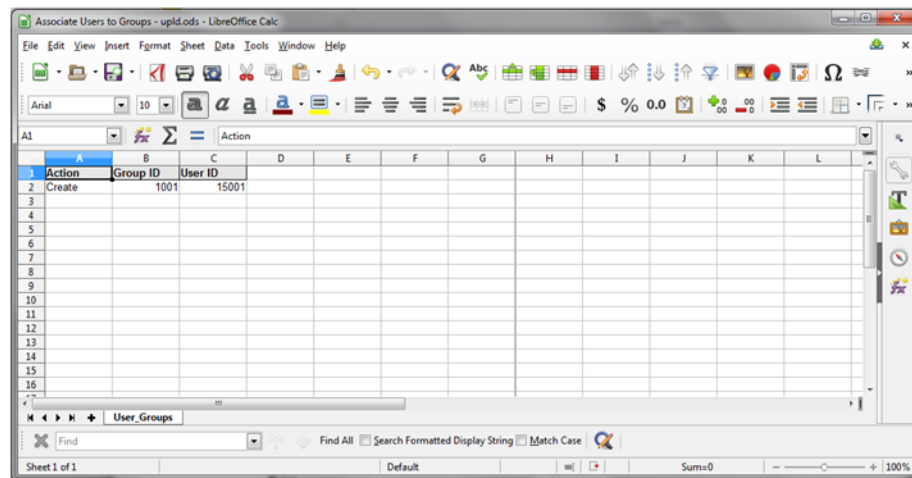
Figure 1–40 Open File

7. Save As < file name>.

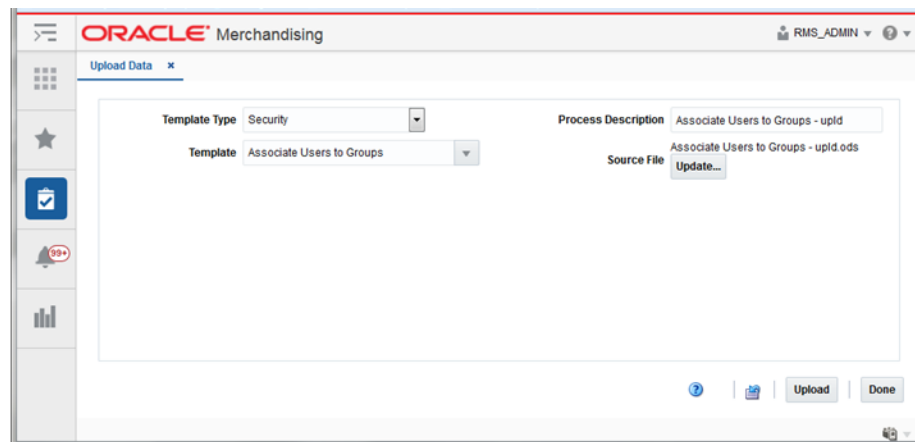
Figure 1–41 Save as <File Name>

8. In the User_Groups tab, enter/select the following:

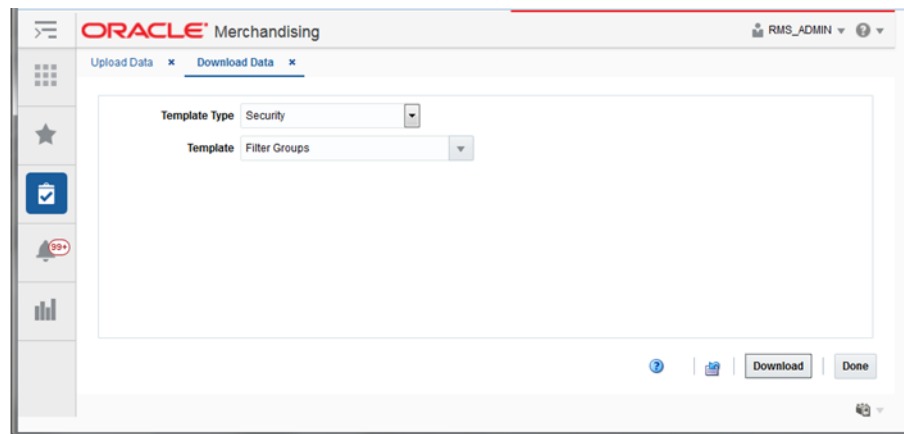
- Action: 'Create'
- Group ID: <Group ID>
- User ID: <User ID>

Figure 1–42 Enter User Groups information

9. Save and Close the file.
10. In the RMS Application, navigate to Foundation Data > Data Loading > Upload.
11. In the Upload Data screen, select:
 - Template Type as 'Security'
 - Template as 'Associate Users to Groups'
 - Enter new Process Description or retain as is
 - Browse and select the Source file that was created in Step 9

Figure 1–43 Upload User Groups Information

12. Click the **Upload** button.

Figure 1–46 Download Filter Groups Template Spreadsheet

3. Click the **Download** button.
4. Save File to local directory location when prompted.

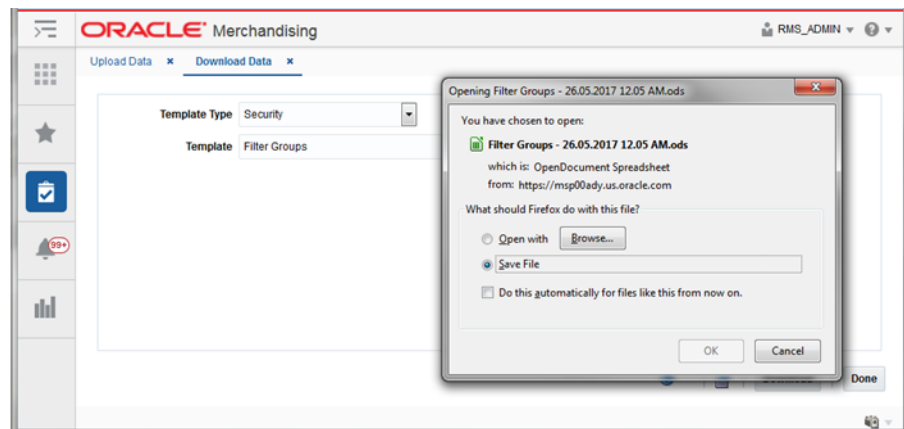
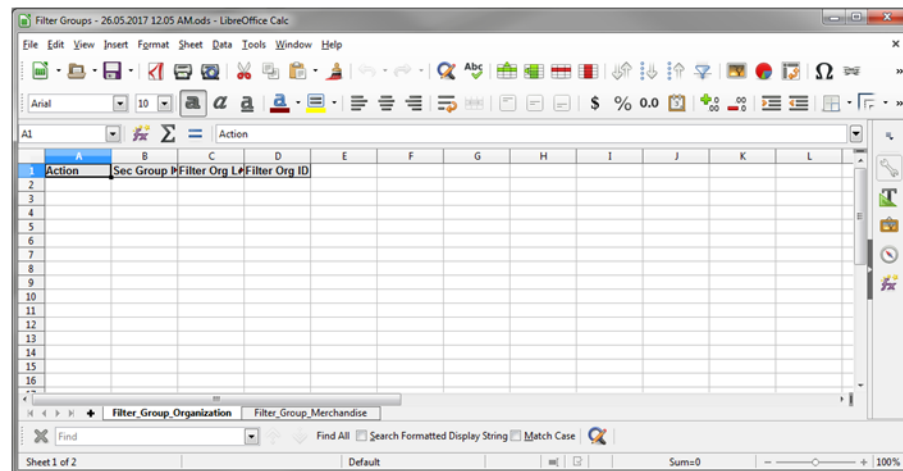
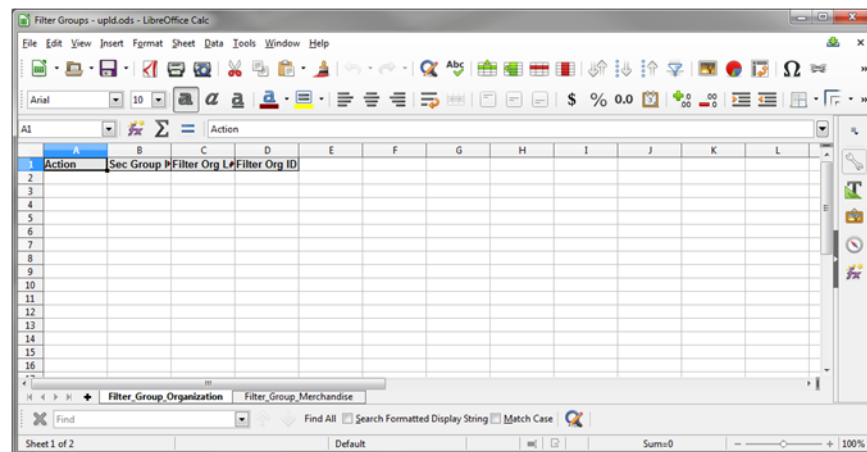
Figure 1–47 Save File

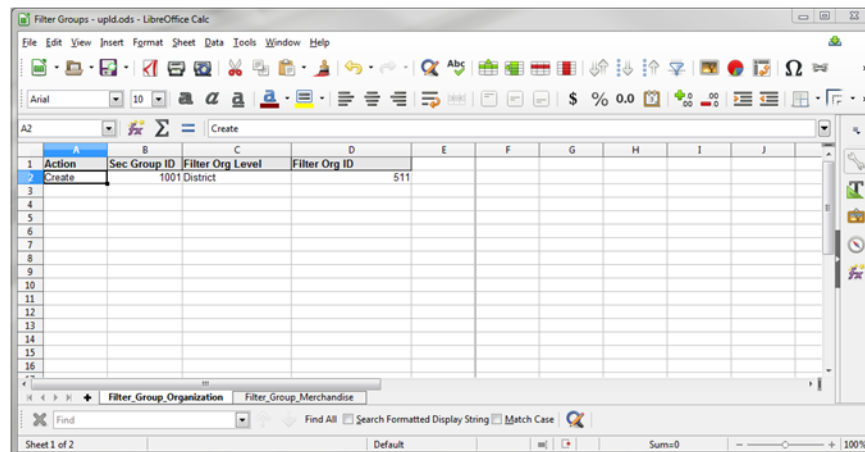
Figure 1–48 Open File

7. Save As < file name>.

Figure 1–49 Save as <File Name>

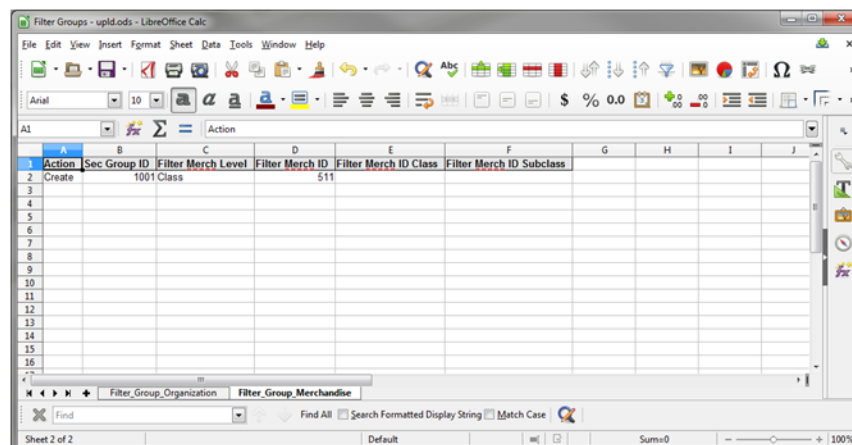
8. In the Filter_Group_Organization tab, enter/select the following:

- Action: 'Create'
- Sec Group ID: <User Security group ID>
- Filter Org Level: <Organization hierarchy level>
- Filter Org ID: <ID of the Organization hierarchy level>

Figure 1–50 Enter Filter Group Organization information

9. In the Filter_Group_Merchandise tab, enter/select the following:

- Action: 'Create'
- Sec Group ID: <User Security group ID>
- Filter Merch Level: <Organization hierarchy level>
- Filter Merch ID: <ID of the Merchandise hierarchy level>
- Filter Merch ID Class: <Class ID of the Merchandise hierarchy level> (optional depending on the selected Filter Merch Level)
- Filter Merch ID Subclass: <Subclass ID of the Merchandise hierarchy level> (optional depending on the selected Filter Merch Level)

Figure 1–51 Enter Filter Group Merchandise information

10. Save and close the file.

11. In the RMS Application, navigate to Foundation Data > Data Loading > Upload

- Enter new Process Description or retain as is
- Browse and select the Source file that was created in Step 10

Figure 1–52 Upload Filter Groups Information

The screenshot shows the 'Oracle Merchandising' application window with the 'Upload Data' tab selected. The interface includes a sidebar with navigation icons (home, star, checkmark, bell with '99+', and bar chart). The main content area has the following fields:

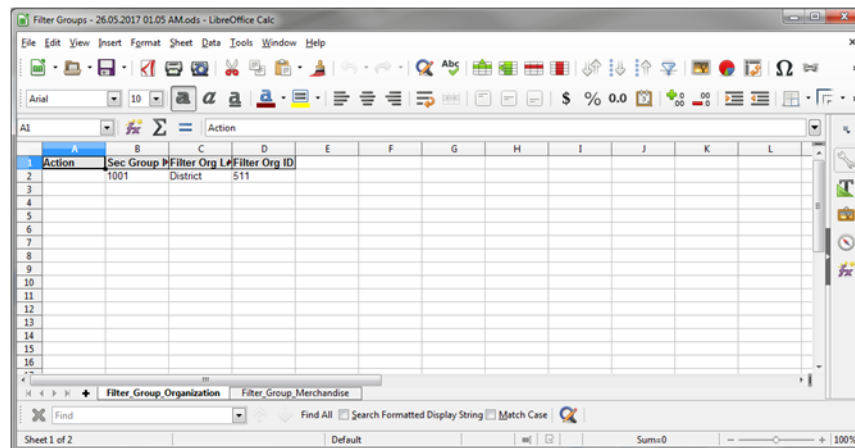
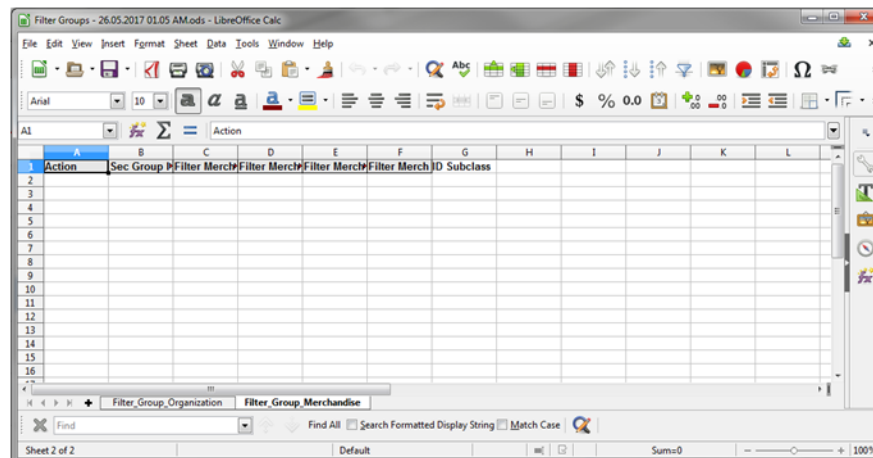
- Template Type:** A dropdown menu set to 'Security'.
- Template:** A dropdown menu set to 'Filter Groups'.
- Process Description:** A text field containing 'Filter Groups - upld'.
- Source File:** A text field containing 'Filter Groups - upld.ods'.
- Buttons:** An 'Update...' button is located next to the Source File field. At the bottom right, there are 'Upload' and 'Done' buttons.

13. Click the **Upload** button.

Figure 1–53 Upload Filter Groups Information Complete

This screenshot shows the same 'Oracle Merchandising' application window, but the 'Source File' field now displays 'Browse...' and 'No file selected.' instead of a specific file name. The 'Template Type' and 'Template' dropdowns remain the same. The 'Process Description' field is now empty. The 'Upload' and 'Done' buttons are still present at the bottom right.

- 14.

Figure 1–54 View Newly Created Filter Groups**Figure 1–55 Newly Created Filter Groups**

Retail Merchandising Cloud Services Default Enterprise Roles

Retail Merchandising Cloud Services is built with role-based access. Permissions are associated with roles. Assign these roles to the user following the steps in the section, "Assigning Members to a Role" as per your requirement.

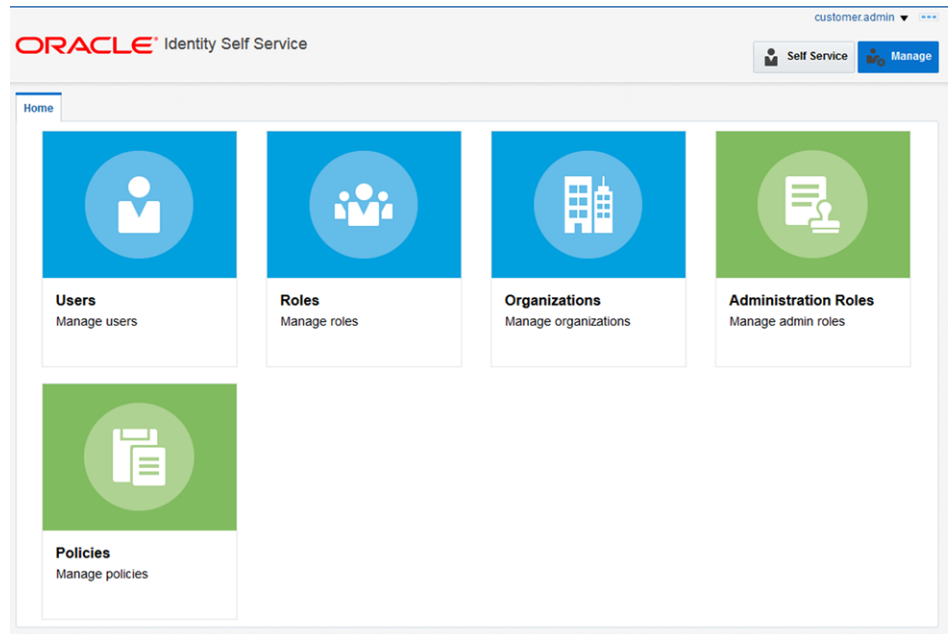
The following roles are available for RMS and ReSA:

Table 1–1 Retail Merchandising Cloud Services Default Enterprise Roles

Module	Default Enterprise Roles	Corresponding Application Roles
Merchandising	Application Administrator	RMS Application Administrator

Table 1–1 (Cont.) Retail Merchandising Cloud Services Default Enterprise Roles

Module	Default Enterprise Roles	Corresponding Application Roles
Merchandising	Inventory Control Manager	Inventory Control Manager
Merchandising	Sourcing Analyst	Sourcing Analyst
Merchandising	Finance Analyst	Finance Analyst
Merchandising	Supply Chain Analyst	Supply Chain Analyst
Merchandising	Finance Manager	Finance Manager
Sales Audit	Sales Audit Analyst	Sales Audit Analyst
Sales Audit	Sales Audit Manager	Sales Audit Manager
Sales Audit	Application Administrator	RESA Application Administrator
Sales Audit	Finance Manager	Finance Manager
Batch Schedule	Batch Business	Batch Business
Pricing	Application Administrator	Pricing Application Administrator
Pricing	Data Steward	Pricing Data Steward
Pricing	Pricing Analyst	Pricing Analyst
Pricing	Pricing Manager	Pricing Manager
Pricing	Promotion Planner	Promotion Planner
Pricing	Promotion Manager	Promotion Manager
Invoice Matching	Accounts Payable Specialist	Accounts Payable Specialist
Invoice Matching	Finance Manager	Finance Manager
Invoice Matching	Buyer	Buyer
Invoice Matching	Corporate Inventory Control Analyst	Corporate Inventory Control Analyst
Invoice Matching	Application Administrator	ReIM Application Administrator
Invoice Matching	Finance Analyst	Finance Analyst
Invoice Matching	Accounts Payable Manager	Accounts Payable Manager

Figure 1–56 Select Users

- Click the oim.test user.

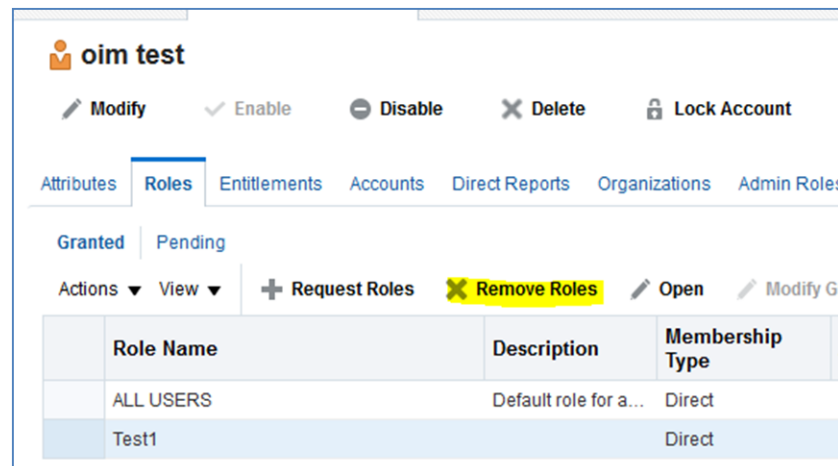
Figure 1–57 Select Role to Revoke Users

The screenshot shows the Oracle Identity Self Service Users page. The 'Users' tab is selected. The table below lists the users, with 'oim.test' highlighted in blue.

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</	

5. Select the Role you want to revoke and click the **Remove Role** button.

Figure 1–59 Remove Roles Button



6. In the Remove Roles screen, click **Submit**.

Figure 1–60 Remove Roles Screen

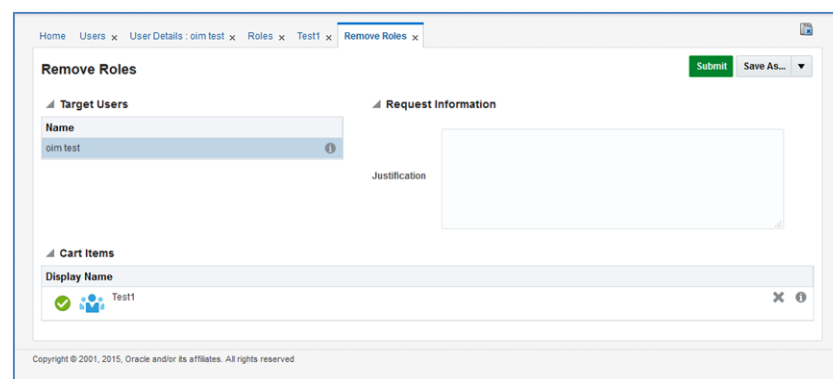
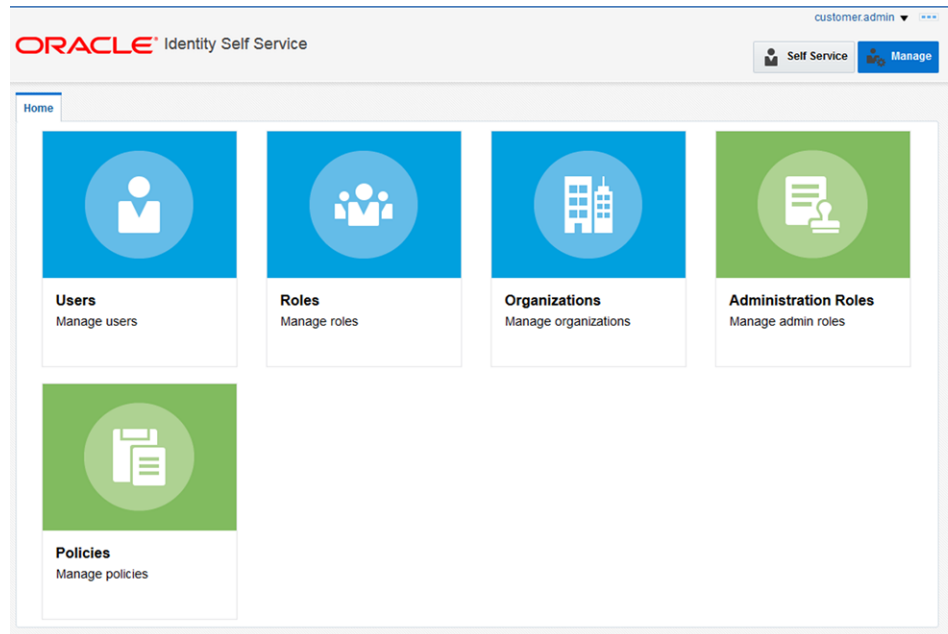


Figure 1–61 Select Users

3. Select the user and click **Disable** or **Delete** as necessary.

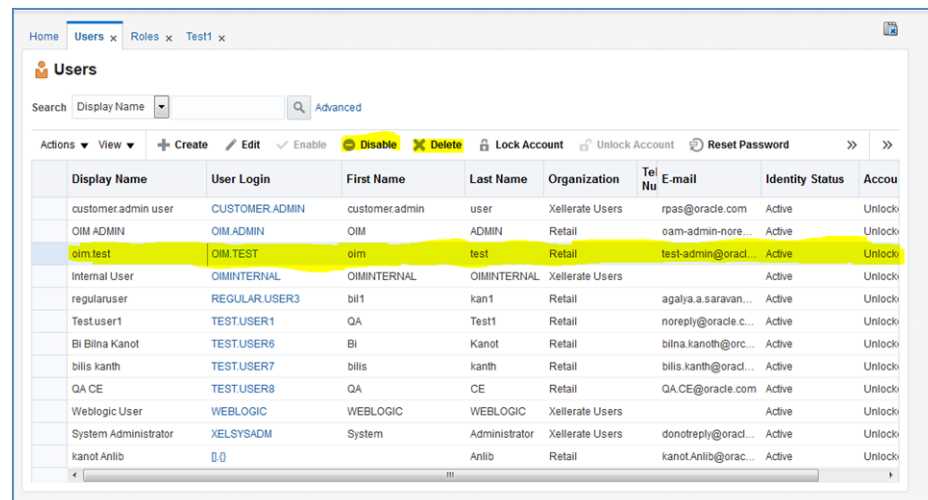
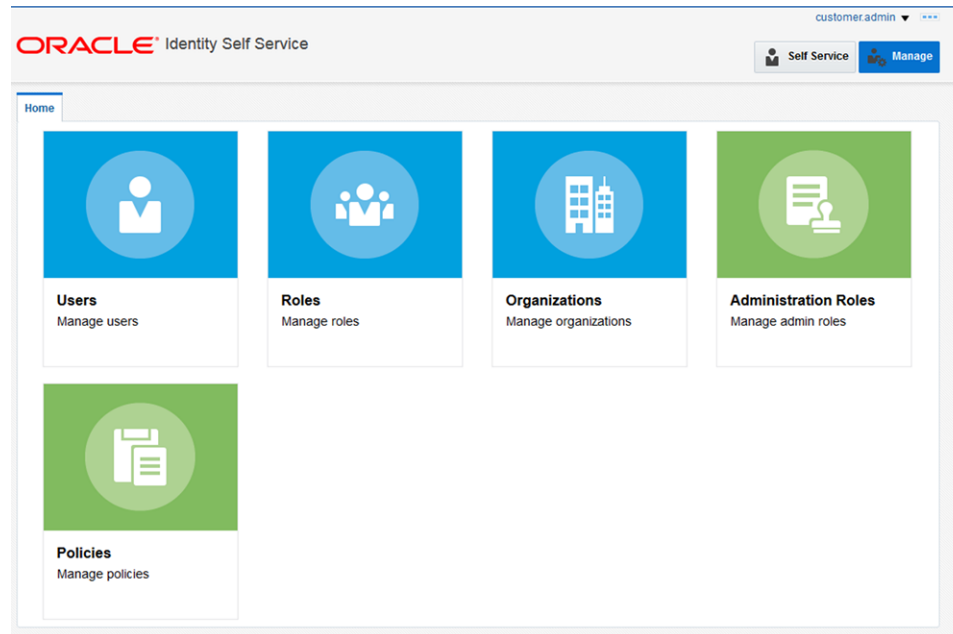
Figure 1–62 Delete and Disable

Figure 1–63 Select Users

3. Click the **Search** tab and then select on the User you want to reset the password.
4. Click **Reset Password**.

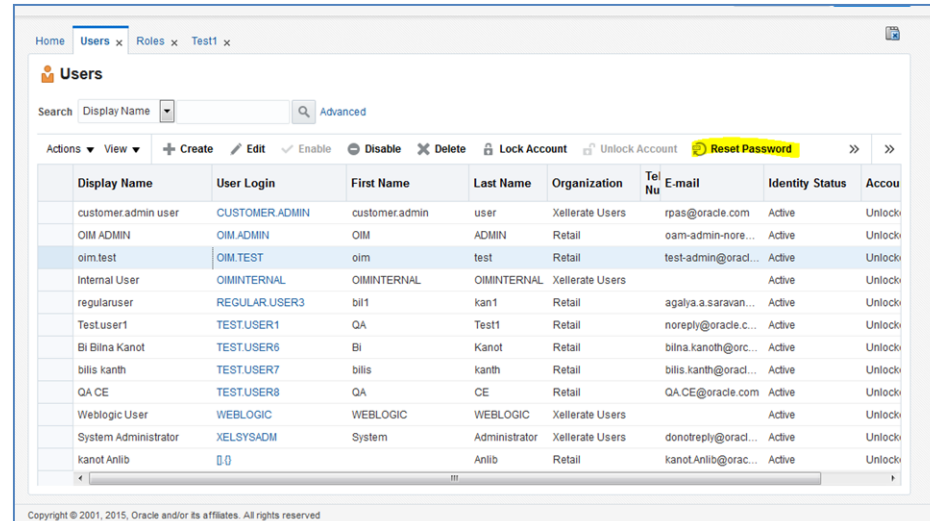
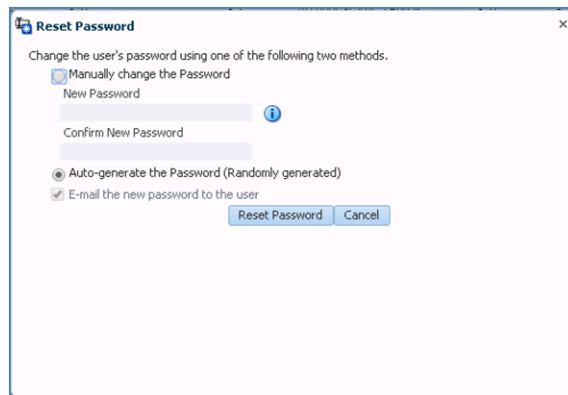
Figure 1–64 Reset Password Button

Figure 1–65 Reset Password


Reset Password

Change the user's password using one of the following two methods.

☐ Manually change the Password

New Password

Confirm New Password

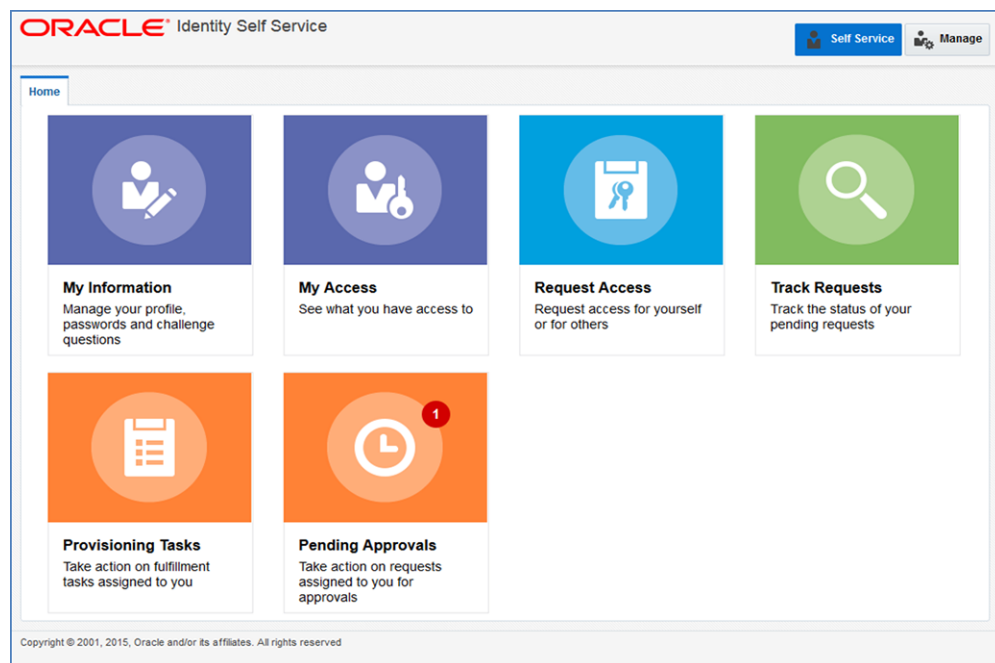
☒ Auto-generate the Password (Randomly generated)

☒ E-mail the new password to the user

Approve Requests from User

The users can also request for the Roles or revoke those that are available for him to access the RIS Service. Follow these steps to approve the request from the User.

1. Login into OIM Application.
2. Click **Pending Approvals**.

Figure 1–66 Select Pending Approvals


ORACLE Identity Self Service

Self Service Manage

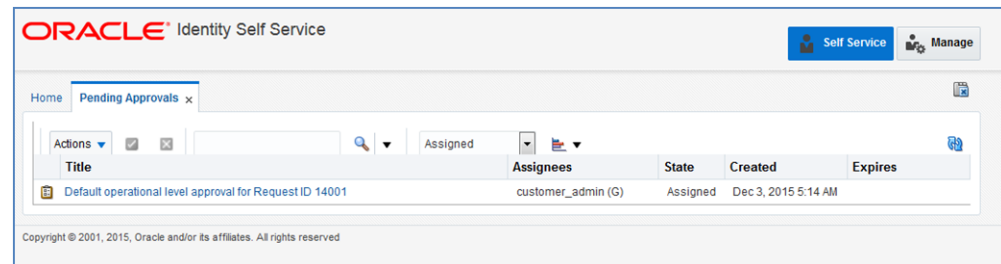
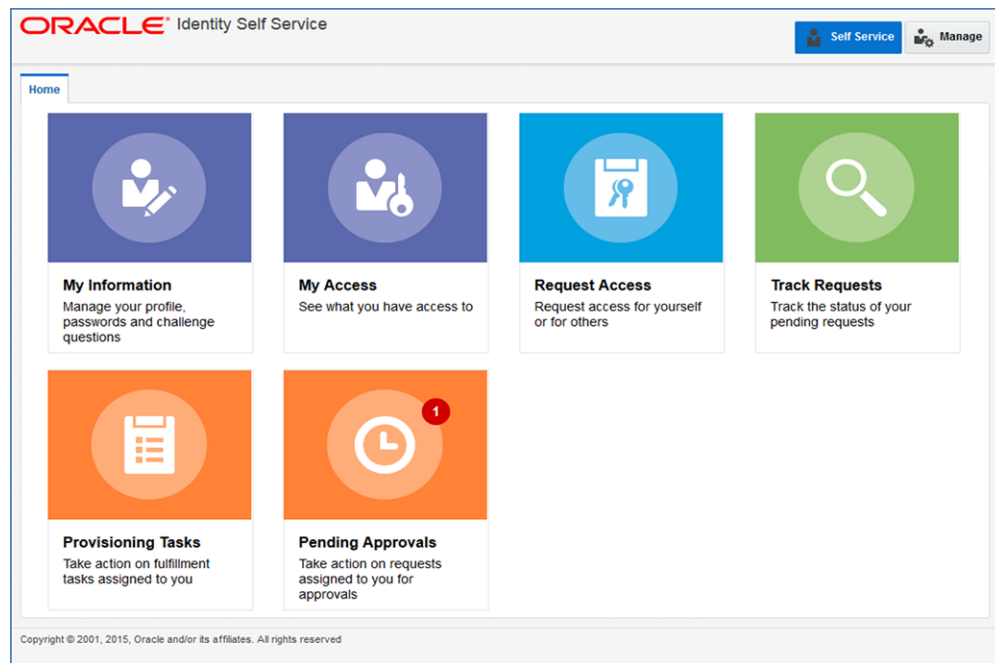
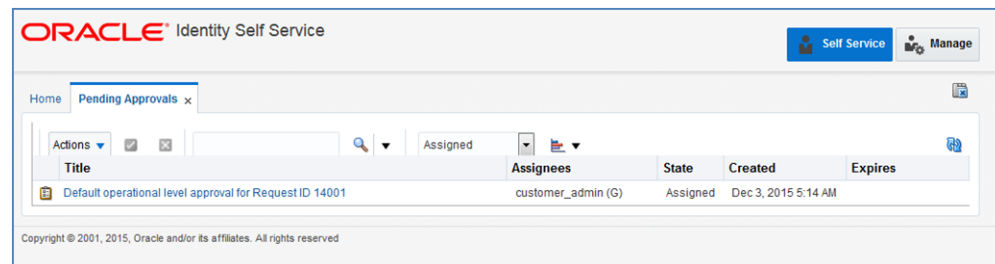
Figure 1–67 Pending Approvals Tab

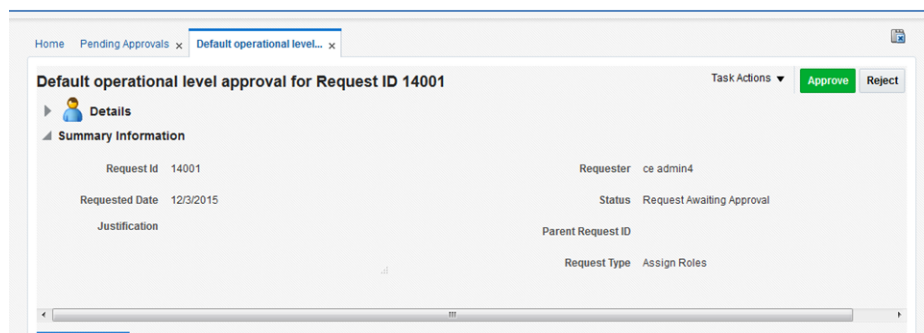
Figure 1–70 Select Pending Approvals

3. Click on the Action that is assigned to you.

Figure 1–71 Pending Approvals Tab

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

Figure 1–73 Approve Pending Approval



Bulk Role Membership Update (Optional)

If you have quite a few users that have roles to be assigned to, the Oracle team can bulk update the role membership into the OIM Application.

To update the membership of the by bulk update, perform the following steps.

1. Create CSV file with the user role mapping. Please note that the user name must be in upper case format (see the example in step 3).
2. Open an

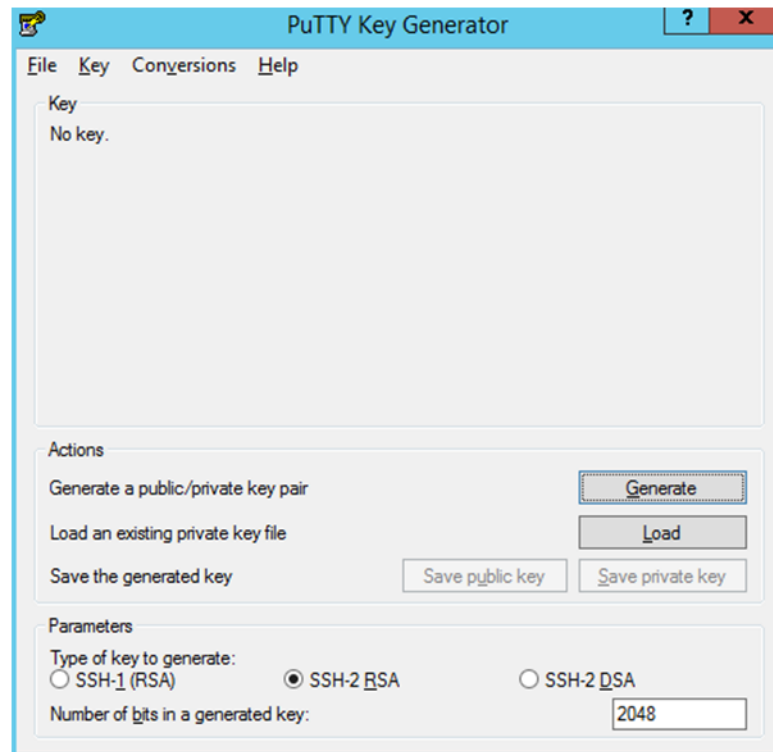
Figure 1–74 Key Generator

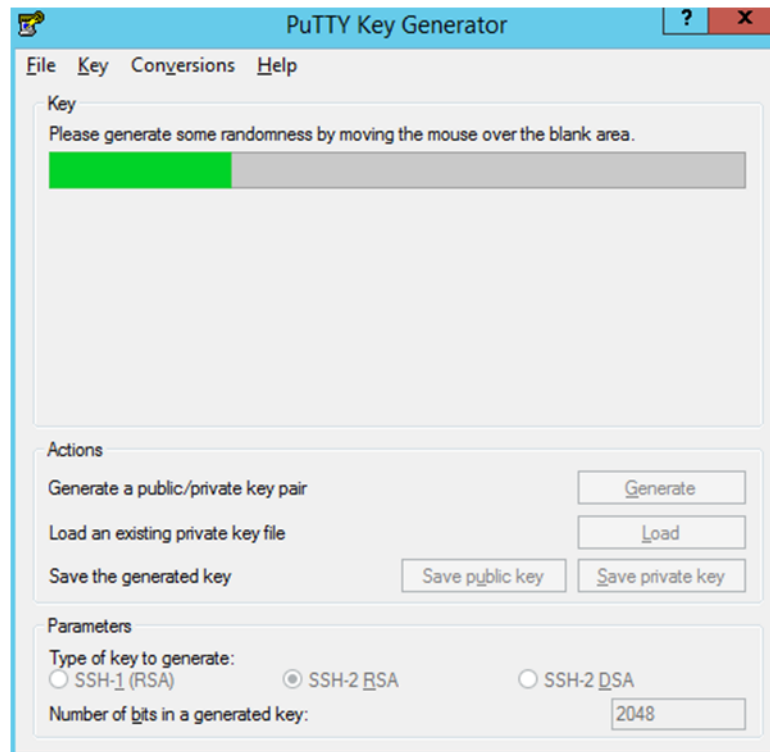
Figure 1–75 Key Generator Progress

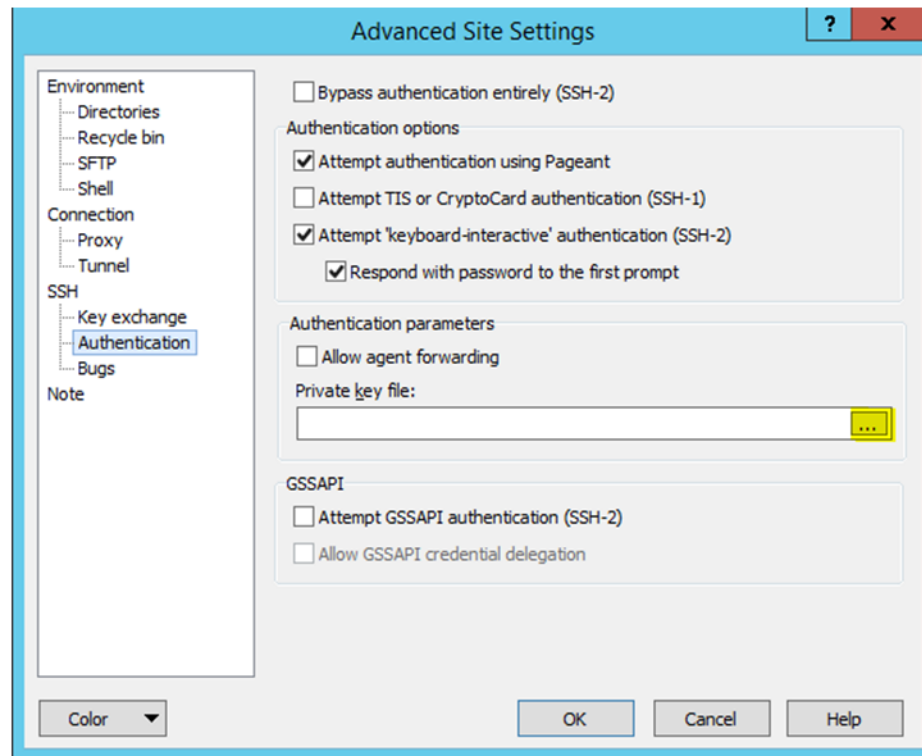
Figure 1–76 Advanced Site Settings Dialog

Figure 1–77 Private Key File Loaded

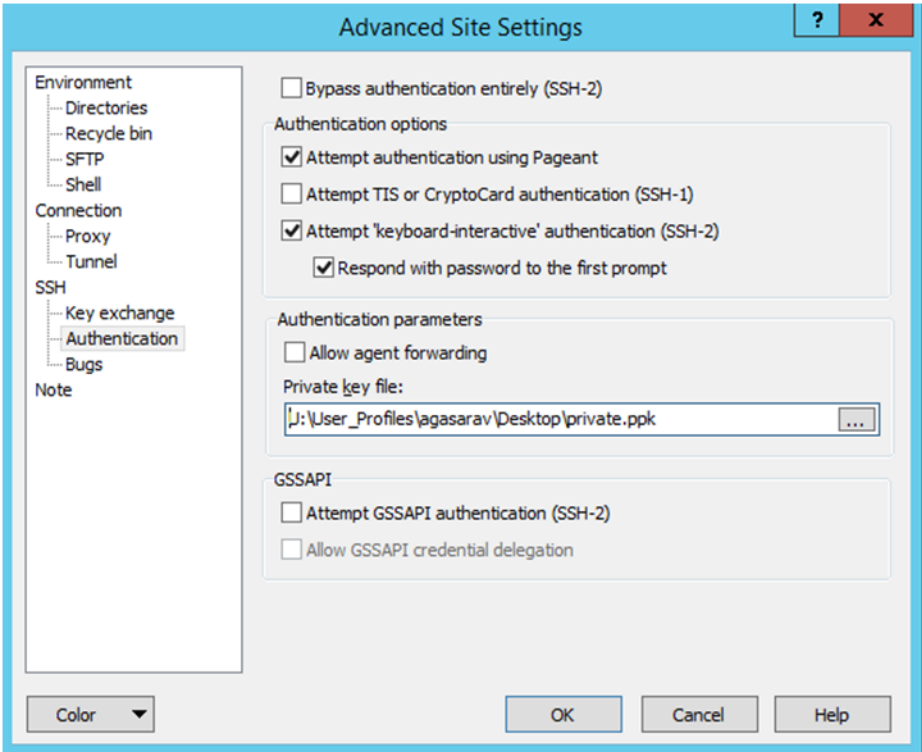


Figure 1–79 Transferring Empty File

Name	Type	Changed	Name	Changed
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