Oracle® Retail Merchandising Cloud Services

Administration Guide

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Oracle Retail Merchandising Cloud Services Administration Guide, Release 16.0

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Oracle® Retail Merchandising Cloud Services Administration Guide, Release 16.0

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- Are the implementation steps correct and complete?
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- Do you need different information or graphics? If so, where, and in what format?
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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.

Related Documents

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

- *Oracle Retail Merchandising Cloud Services Implementation Guide*
- *Oracle Retail Merchandising Cloud Services Administrator Action List*
- *Oracle Retail Merchandising Foundation Cloud Service Release Notes*

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

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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.

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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.
italic	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.

1

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:

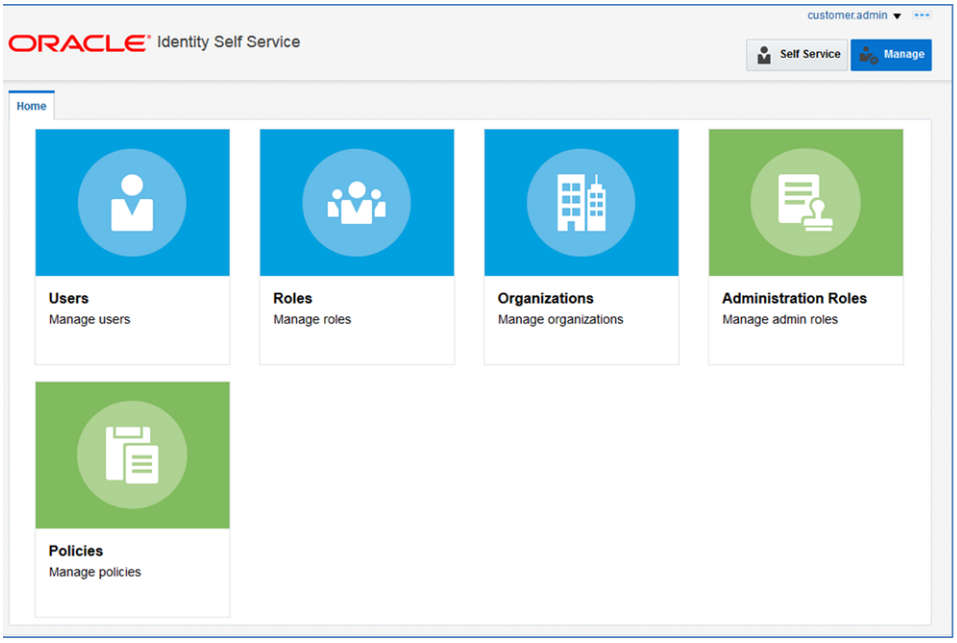
https://support.oracle.com

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



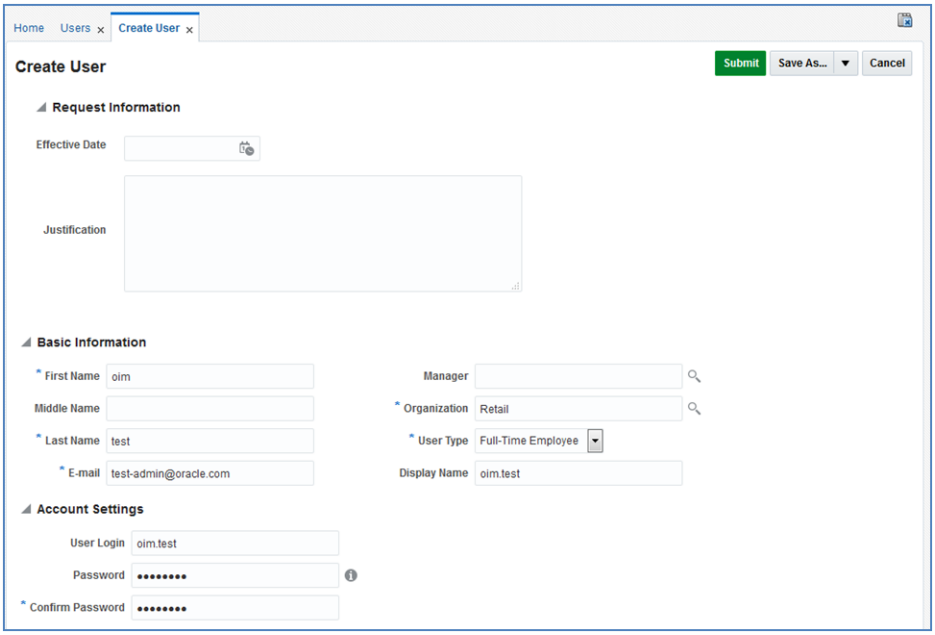
3. Under Actions, click **Create**.

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



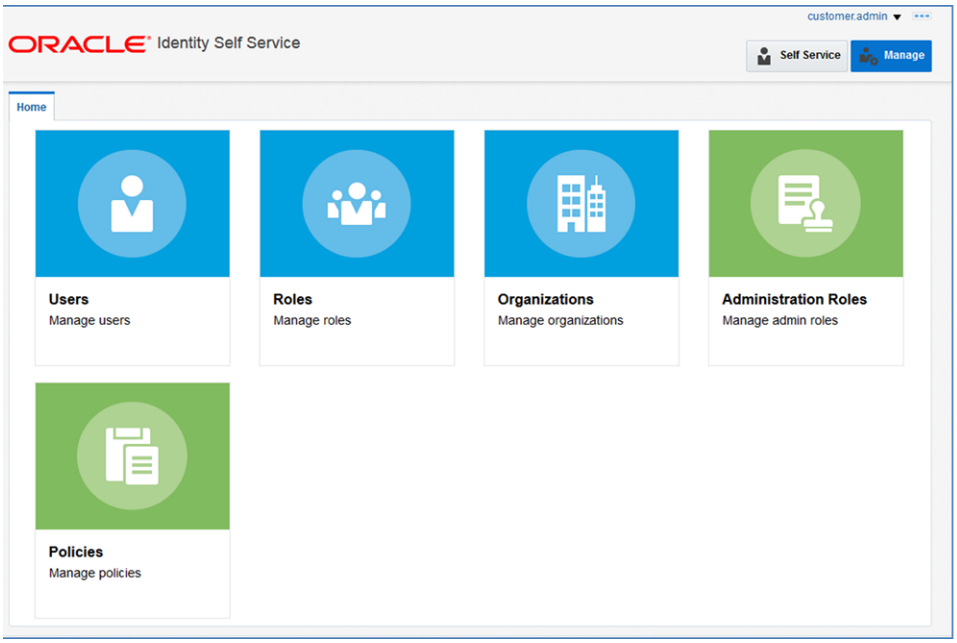
6. Click **Submit**.

Assigning Members to a Role

To assign members to a role, complete the following:

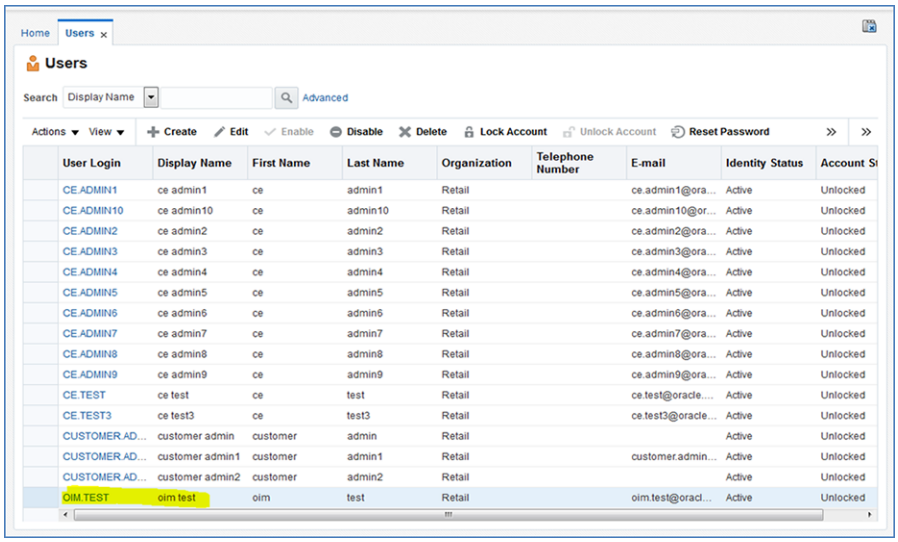
1. Log into the OIM application.
2. Click **Users**.

Figure 1–4 Select Users



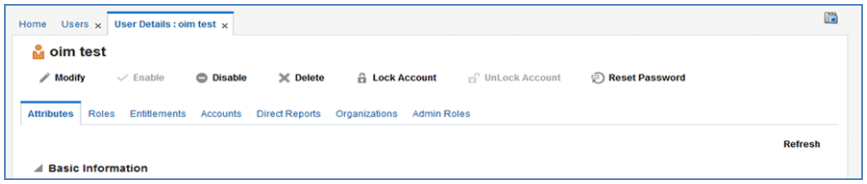
3. Click the oim.test user.

Figure 1–5 oim.test User



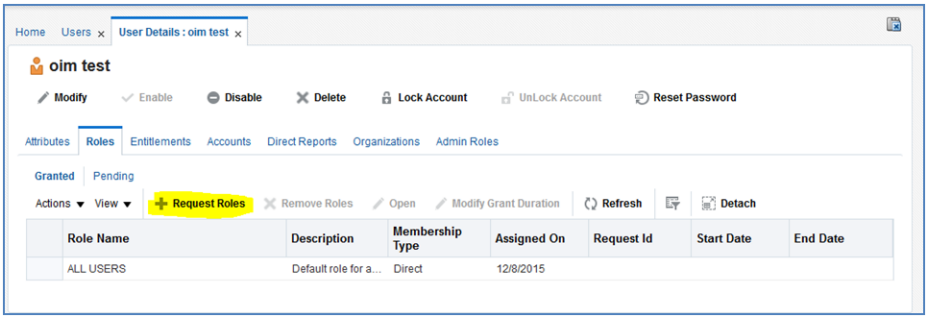
4. Click the Roles tab.

Figure 1–6 Roles Tab



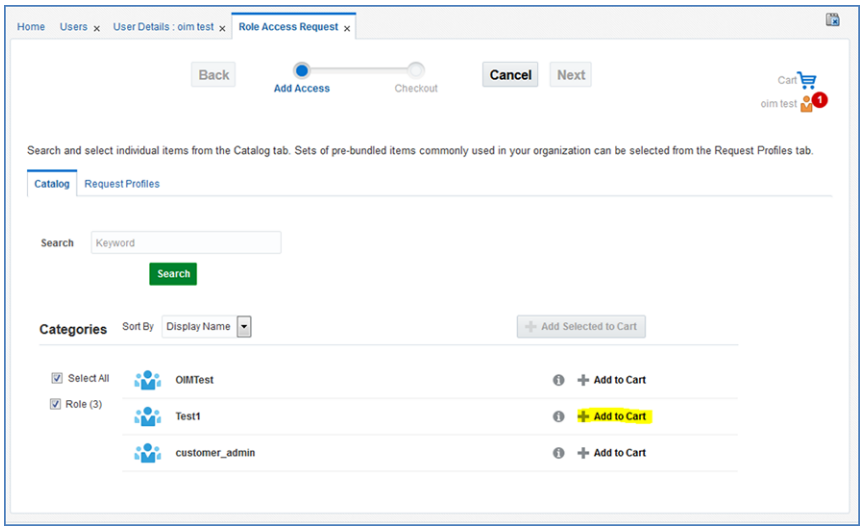
5. Click the **Request Roles** button.

Figure 1–7 Request Roles Button



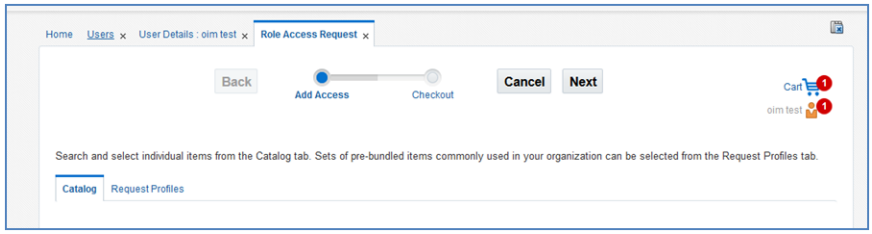
6. Click the **Add to Cart** button next to the role you want to assign.

Figure 1–8 Adding Roles to the Cart



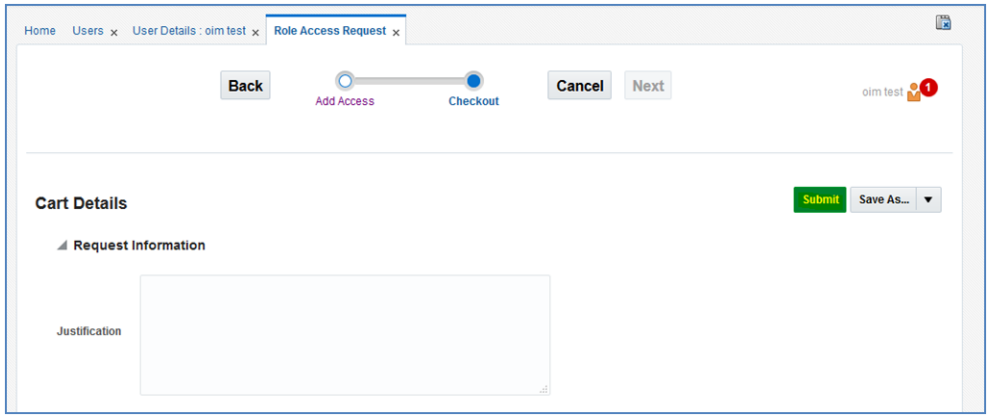
7. Click **Next**.

Figure 1–9 Add Access Request



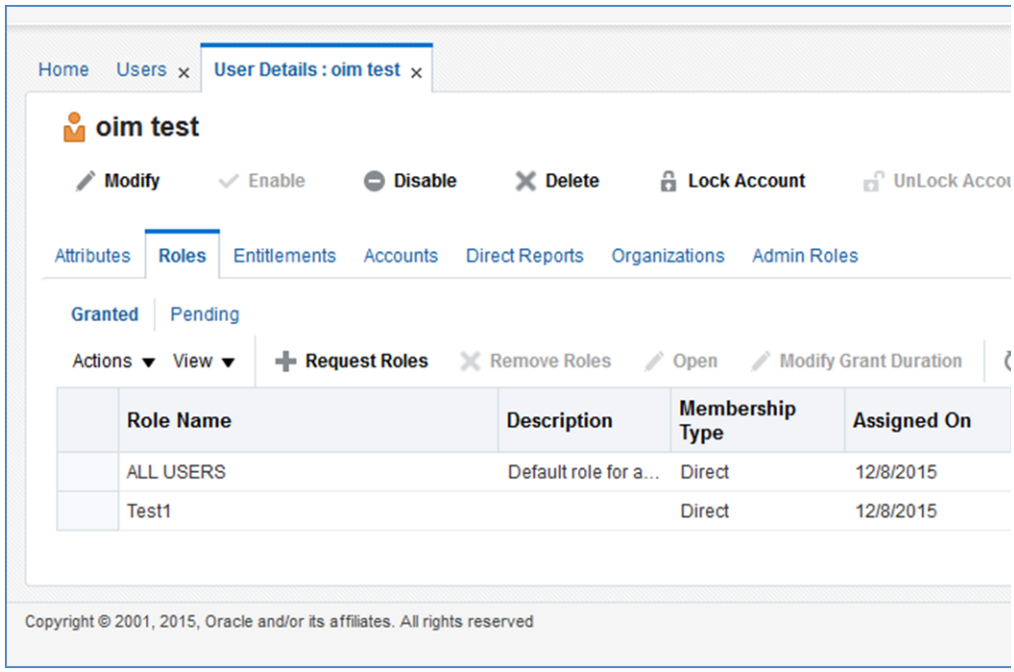
8. Click **Submit**.

Figure 1–10 Submit Access Request



The role is now assigned to the User.

Figure 1–11 User Details



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

Application Module	Default Enterprise Roles	Corresponding Application Roles
ORMS	Application Administrator	RMS Application Administrator
ORMS	Data Steward	RMS Data Steward
ORMS	Buyer	Buyer
ORMS	Inventory Analyst	Inventory Analyst
ORMS	Inventory Manager	Inventory Manager
ORMS	Corporate Inventory Control Analyst	Corporate Inventory Control Analyst
ORMS	Inventory Control Manager	Inventory Control Manager
ORMS	Sourcing Analyst	Sourcing Analyst
ORMS	Finance Analyst	Finance Analyst
ORMS	Supply Chain Analyst	Supply Chain Analyst
ORMS	Finance Manager	Finance Manager
ORESA	Sales Audit Analyst	Sales Audit Analyst
ORESA	Sales Audit Manager	Sales Audit Manager
ORESA	Application Administrator	RESA Application Administrator

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

Application Module	Default Enterprise Roles	Corresponding Application Roles
ORESA	Finance Manager	Finance Manager
ReIM	Accounts Payable Specialist	Accounts Payable Specialist
ReIM	Finance Manager	Finance Manager
ReIM	Buyer	Buyer
ReIM	Corporate Inventory Control Analyst	Corporate Inventory Control Analyst
ReIM	ReIM Application Administrator	ReIM Application Administrator
ReIM	Finance Analyst	Finance Analyst
ReIM	Accounts Payable Manager	Accounts Payable Manager
ReIM	Data Steward	Data Steward
Allocation	Allocation Application Administrator	Allocation Application Administrator
Allocation	Allocation Manager	Allocation Manager
Allocation	Allocator	Allocator
Allocation	Buyer	Buyer

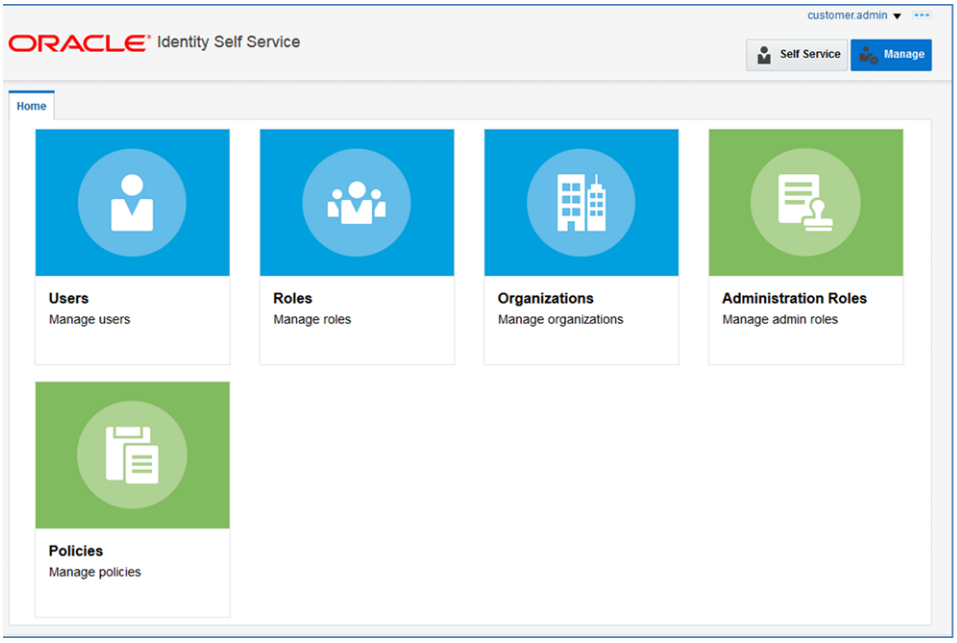
Note: For additional information, see Appendix A, "Appendix: Roles and Permission Grants".

Revoking Role Membership

To revoke the membership of a member in a role:

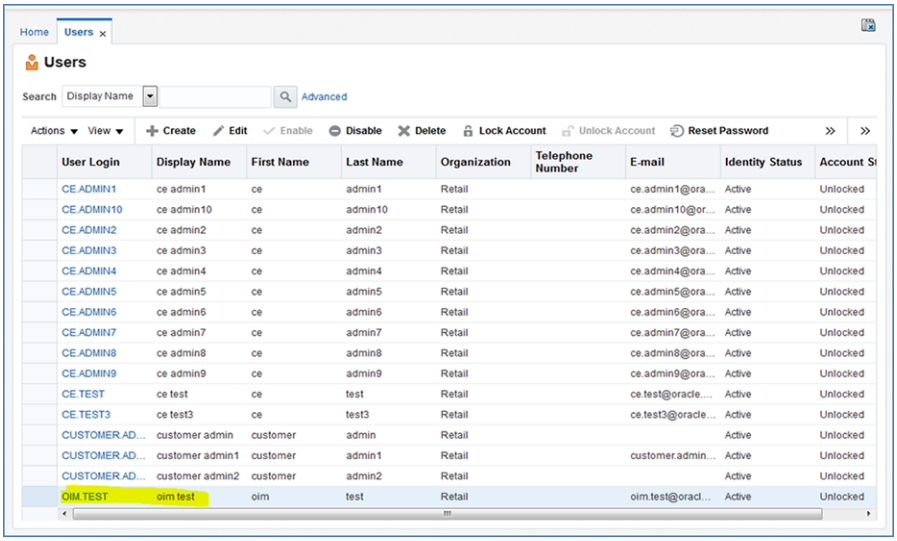
1. Log into the OIM application.
2. Click **Users**.

Figure 1–12 Select Users



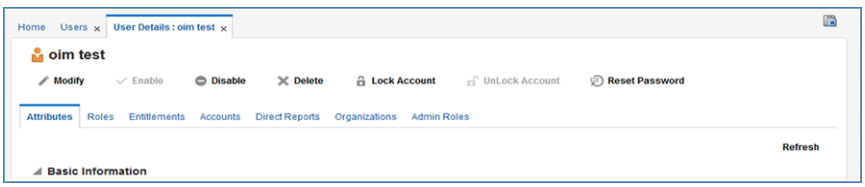
3. Click the oim.test user.

Figure 1–13 Select Role to Revoke Users



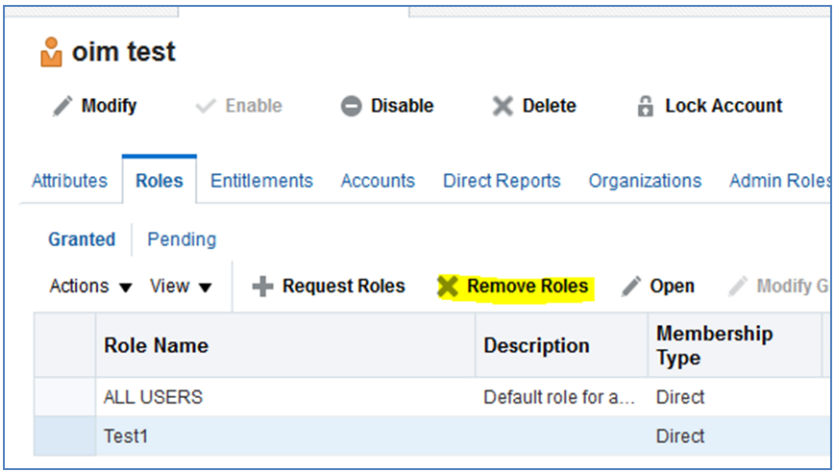
4. Click the Roles tab.

Figure 1–14 Roles Tab



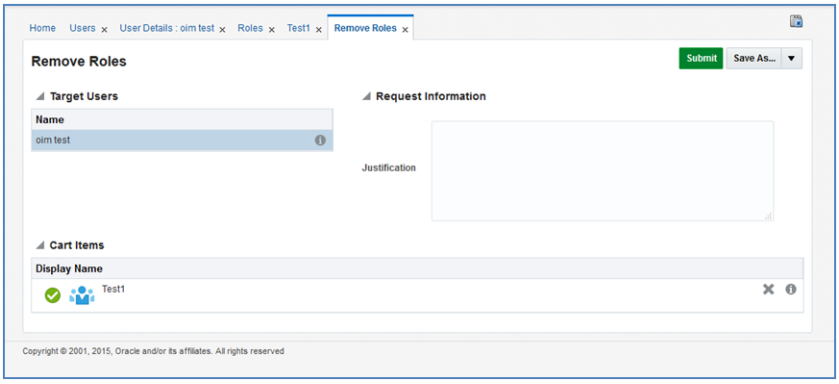
5. Select the Role you want to revoke and click the **Remove Role** button.

Figure 1–15 Remove Roles Button



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

Figure 1–16 Remove Roles Screen

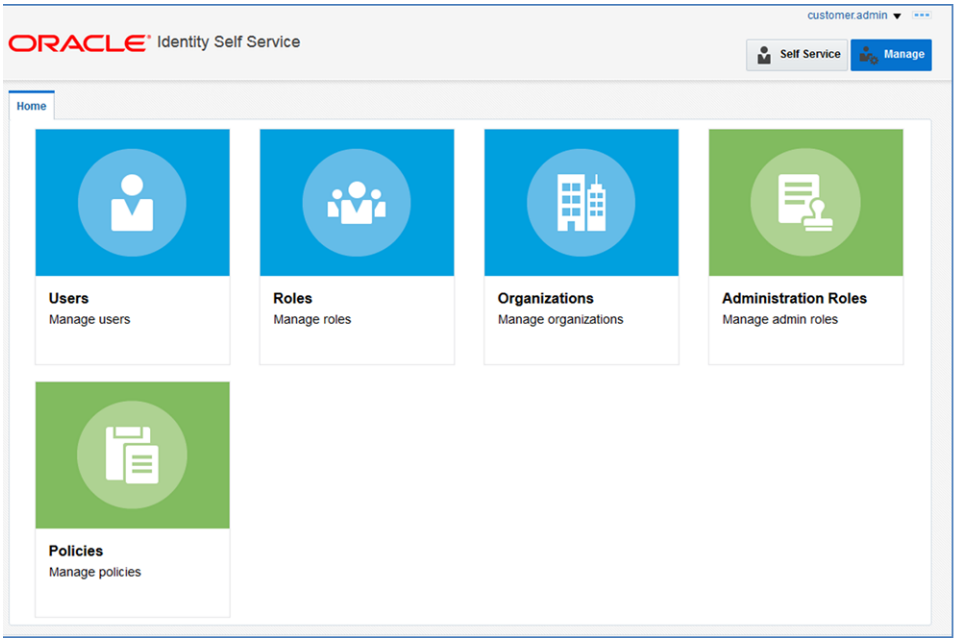


Deleting a User or Disabling User Privileges

To delete or disable a user

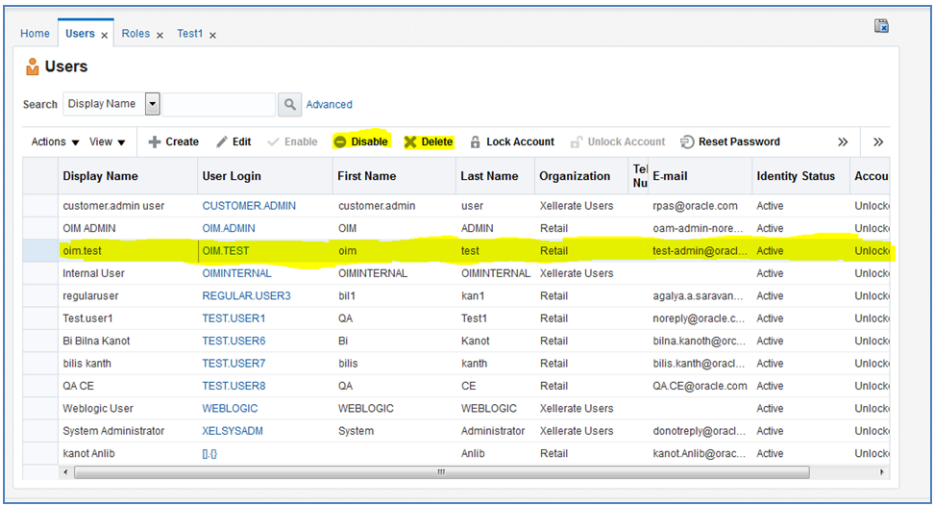
1. Log into the OIM application.
2. Under Administration, click **Users**.

Figure 1–17 Select Users



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

Figure 1–18 Delete and Disable



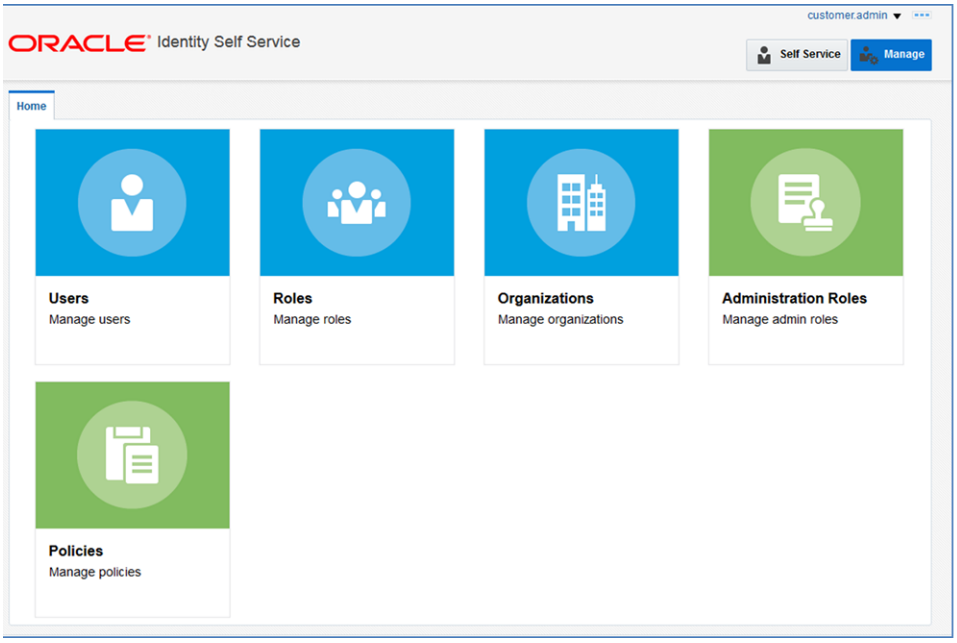
4. You can also Lock or Unlock a particular user from the same screen if needed.

Resetting a User Password

To reset the password of a user:

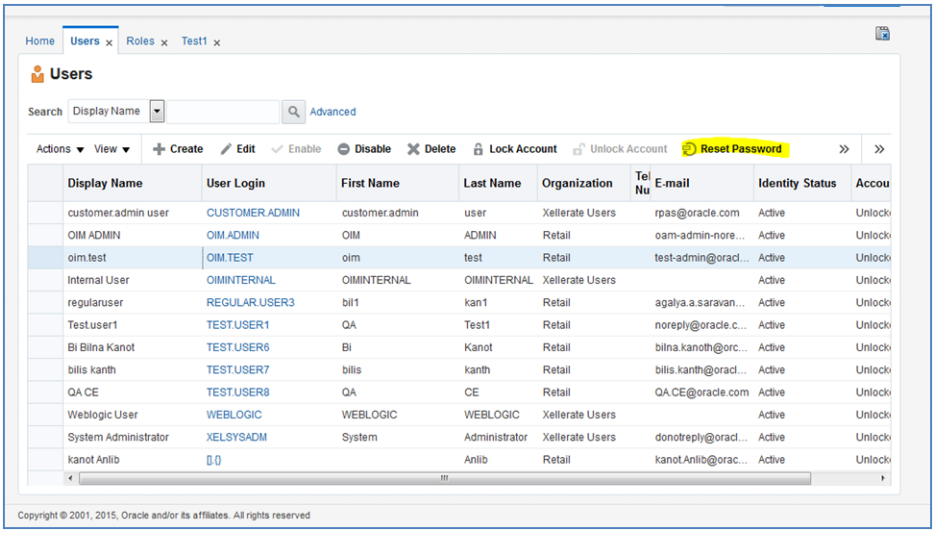
1. Log into the OIM application.
2. Under Administration, click **Users**.

Figure 1–19 Select Users



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

Figure 1–20 Reset Password Button



5. In the Reset Password screen, make sure Auto-generate the Password is selected and then click **Reset Password**. (The system auto-generates the password and e-mails it to the user.)

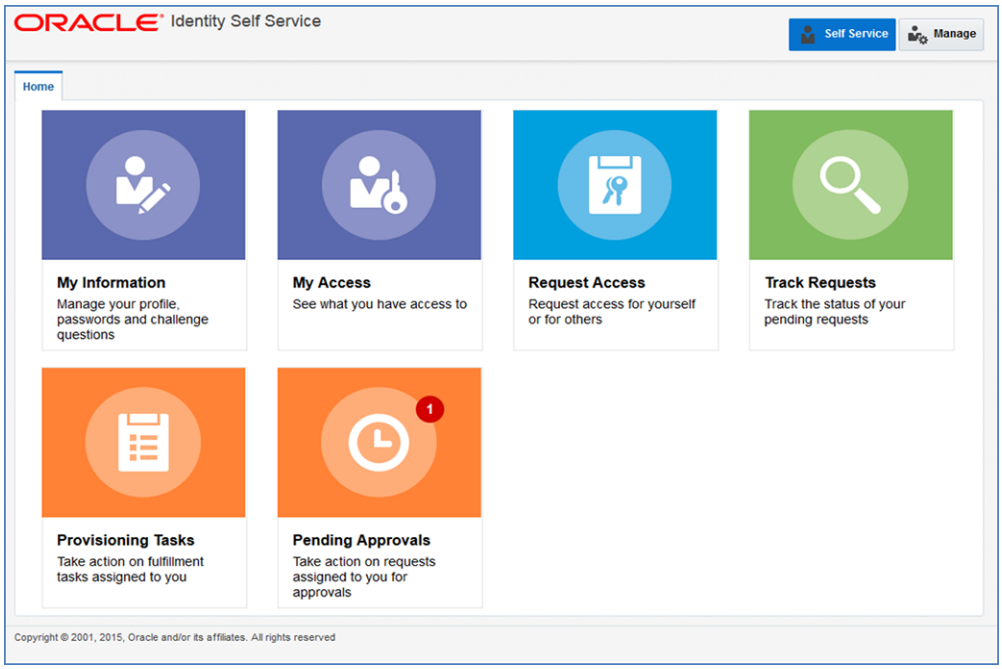
Figure 1–21 Reset Password

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.

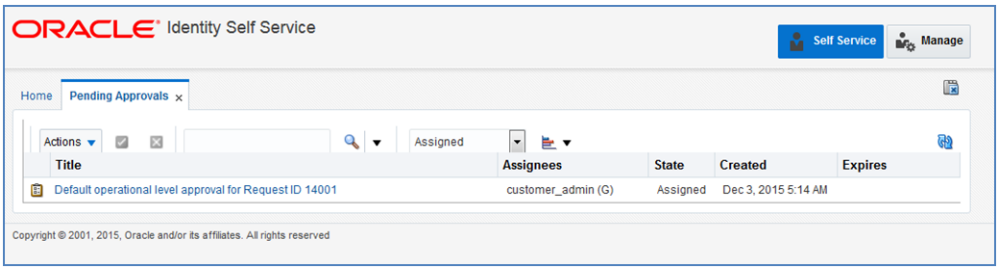
1. Login into OIM Application.
2. Click **Pending Approvals**.

Figure 1–22 Select Pending Approvals



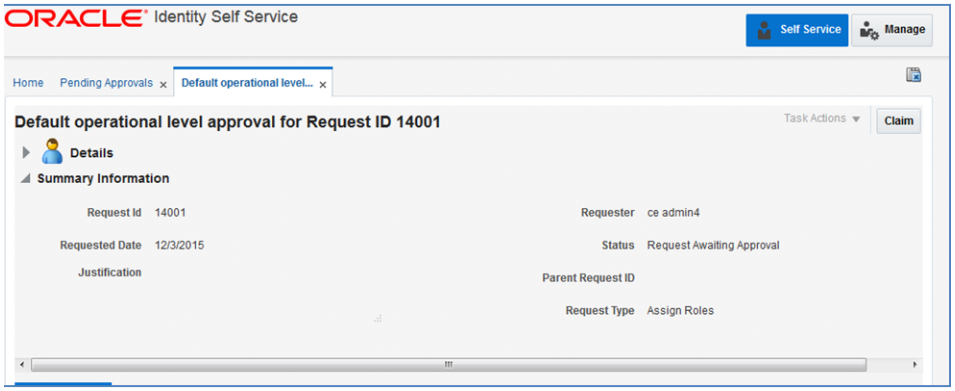
3. Click on the Action that is assigned to you.

Figure 1–23 Pending Approvals Tab



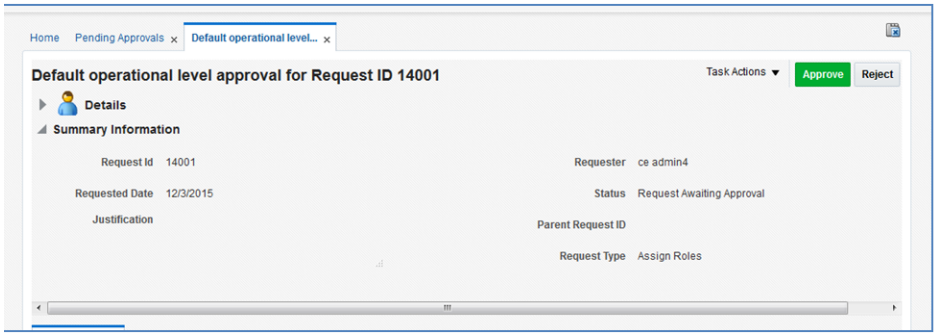
4. Click the **Claim** button.

Figure 1–24 Claim the Pending Approval



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

Figure 1–25 Approve Pending Approval



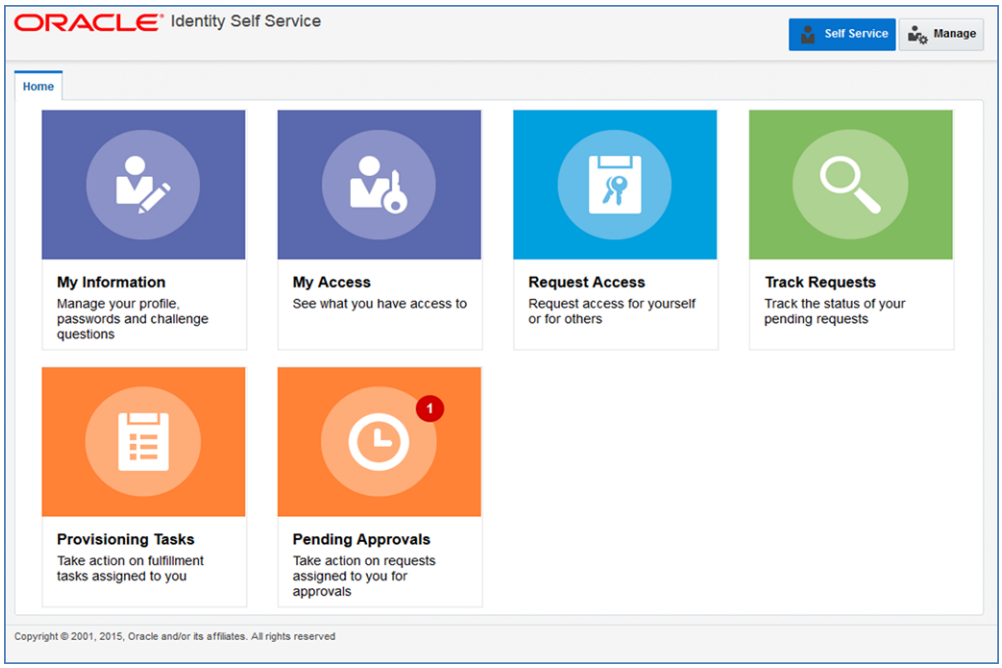
6. The request is complete.

Approve Requests from User for Multiple Roles

Users can also request for the multiple Roles or revoke them if they are available for him to access the RIS Service. Follow these steps to approve the request from the User.

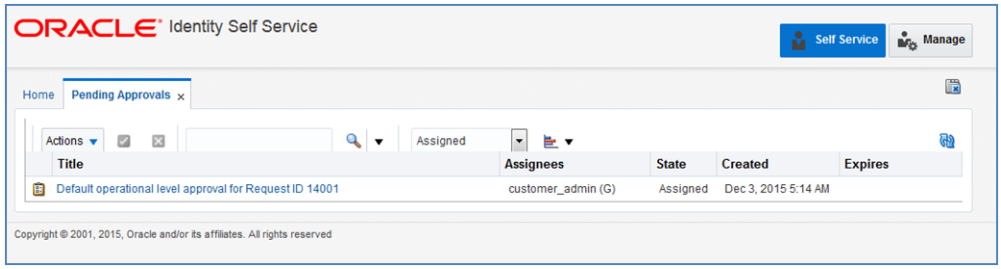
1. Login into OIM Application.
2. Click **Pending Approvals**.

Figure 1–26 Select Pending Approvals



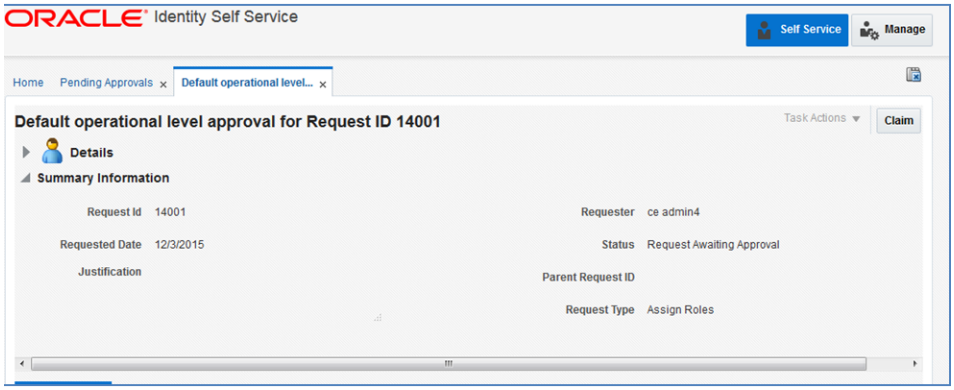
3. Click on the Action that is assigned to you.

Figure 1–27 Pending Approvals Tab



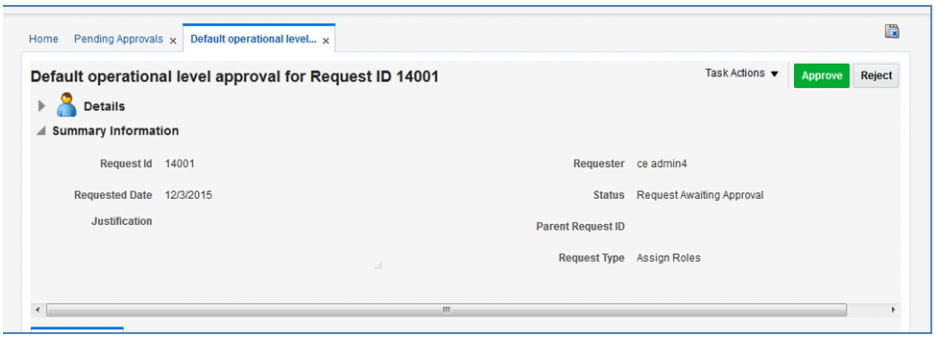
4. Click the **Claim** button.

Figure 1–28 Claim the Pending Approval



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

Figure 1–29 Approve Pending Approval



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 3-5.
7. Once all the requests are approved, all the roles are assigned to users.

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

Importing a Batch of User Accounts

If you have batch of users that have to be created, the Oracle team can bulk load the users into the OIM Application. When users are bulk loaded their initial password will be set to the current password of a template user. The new users are required to change their password on their first login.

To request the creation of accounts by bulk loading, perform the following steps.

1. Create a CSV file listing all of the users to create (see the example in step 3).
2. Create or identify a user whose password will be used as the initial password for all created users.
3. Open an SR with Oracle support and provide the CSV file and user from steps 1 and 2.

```
##################
 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
########################################
```

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 SR with Oracle support and provide the CSV file and user from step 1.

```
##################
 role.csv
##################
########################################
UGP_NAME,USR_LOGIN
Role1,CE.ADMIN1
Role2,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
########################################
```

Note: If you want more than one role attached to a particular user, add one more row with the role that you want the user to have and the user name. Refer to the CE.ADMIN1 in above table for example.

Nightly Batch File Uploads

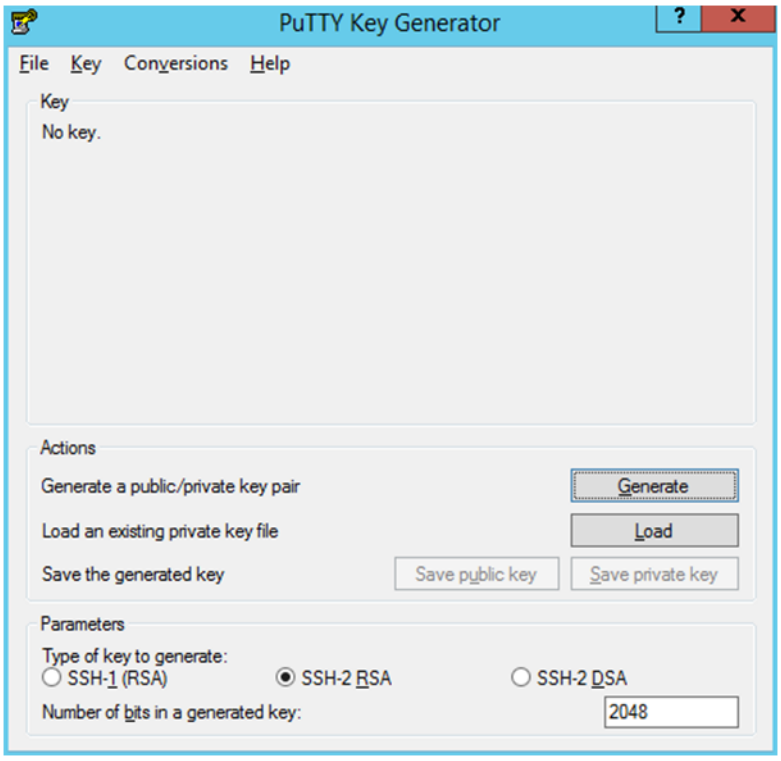
The following is the file upload process. The Private/Public Keys must be generated and the public Key must be associated with your SFTP Account for the file uploads. The Adding Authorized Keys section describes the step-by-step method to generate the Keys (2048 bit RSA Keys).

Adding Authorized Keys

Use this process to generate a 2048 bit RSA key and add the same to the SFTP server. With Windows, use the WinSCP tool or with Linux, use ssh-keygen.

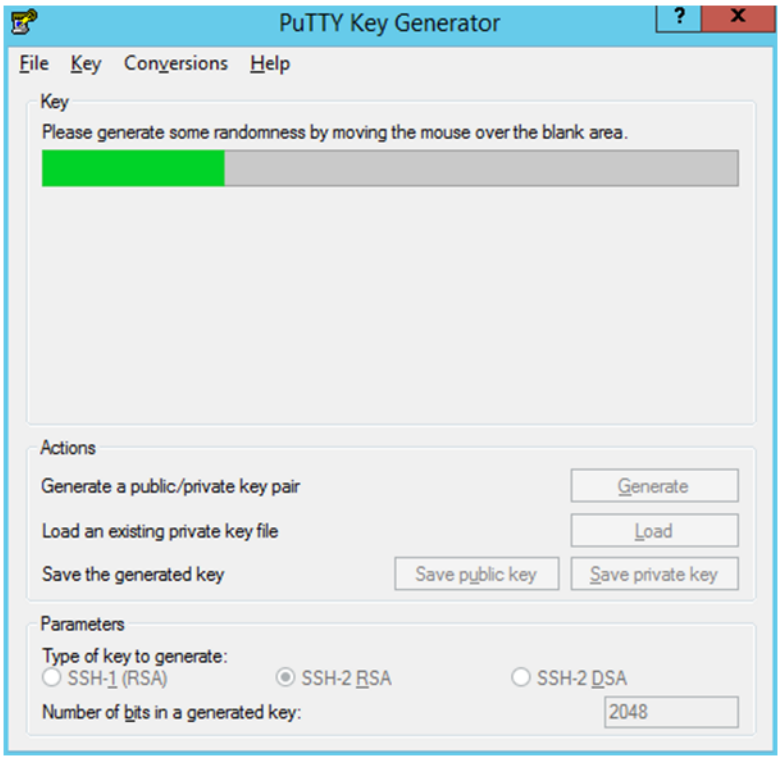
1. Launch WinSCP and select Tools -> Run PuttyGen.
2. Select *SSH-2 RSA* for the type of key to generate and enter *2048* for the number of bits in a generated key field and click **Generate**.

Figure 1–30 Key Generator



3. Move the mouse over the blank space in the window until the key is generated.

Figure 1–31 Key Generator Progress



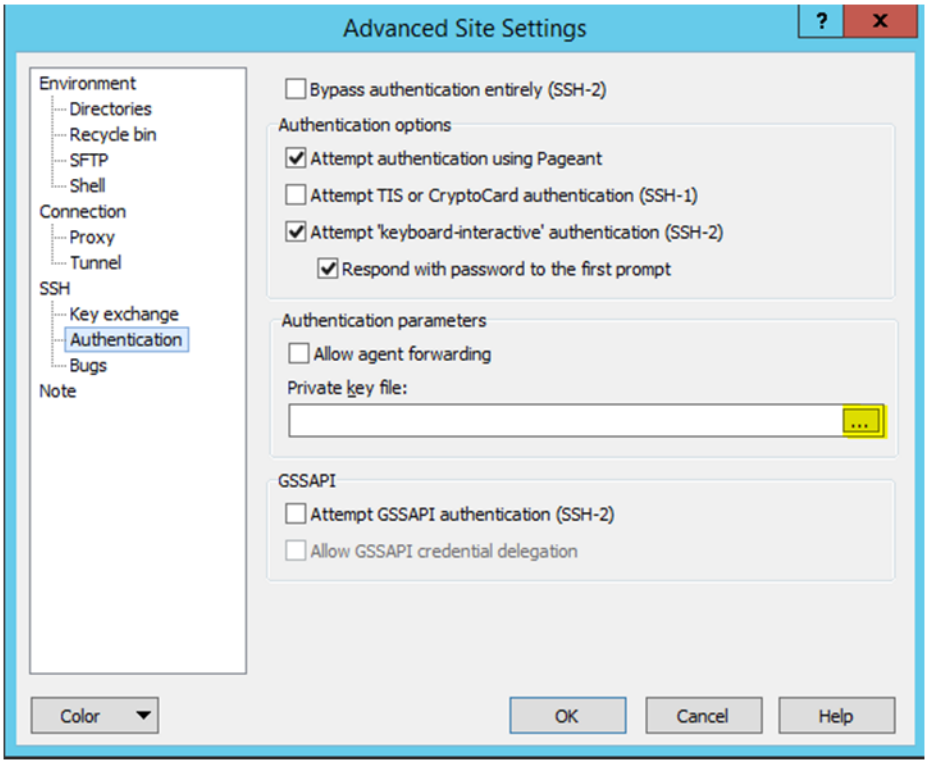
4. Once the key is generated, click **Save public key** to save the public key to a file.
5. Click **Save private key** to save the Private key to a file. Confirm to save it with or without a passphrase.
6. Open an SR with Oracle Support, to associate the Public half of the Key with your SFTP account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

Steps – Login to WinSCP

These upload steps use the private key generated in section, Adding Authorized Keys.

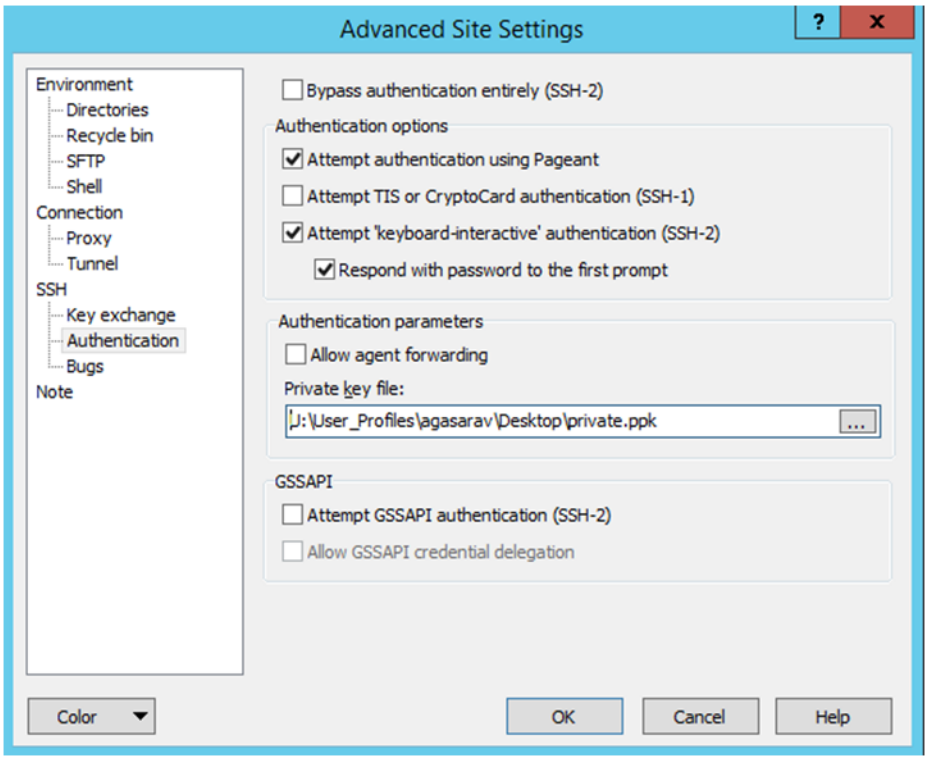
1. Launch WinSCP and connect to <SFTP Server> using port 22.
2. Enter the username and then click **Advanced**.
3. Click **Authentication**.
4. In the Private Key File field, click **Browse** and select the private key created in the section, Adding Authorized Keys.

Figure 1–32 Advanced Site Settings Dialog



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

Figure 1–33 Private Key File Loaded



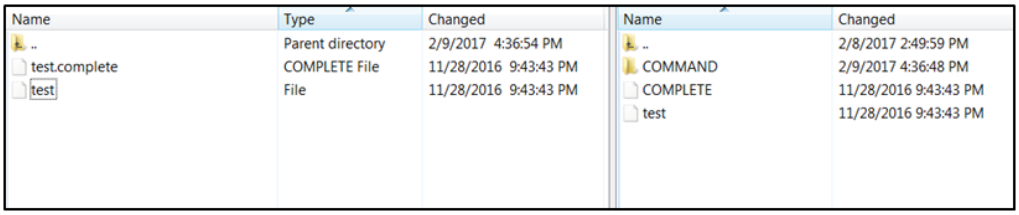
6. Click **Login**. The window does not prompt for a password and logs into the SFTP server. Provide a passphrase if one has been set up.

Steps to Upload the Batch File

Login to the WinSCP by Following the Steps – Login to WinSCP section.

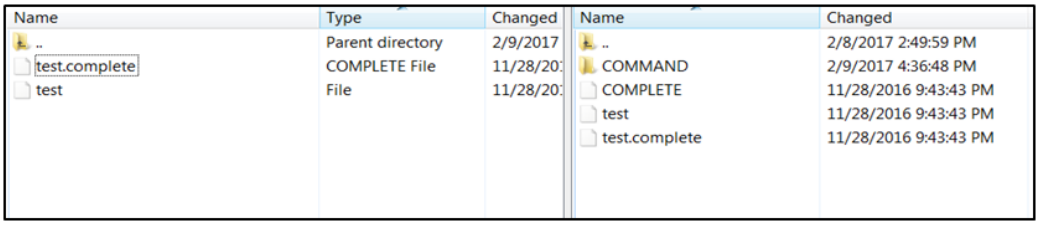
1. Transfer the file to be copied (e.g., test) to /<SFTP User>.

Figure 1–34 <SFTP User> Directory



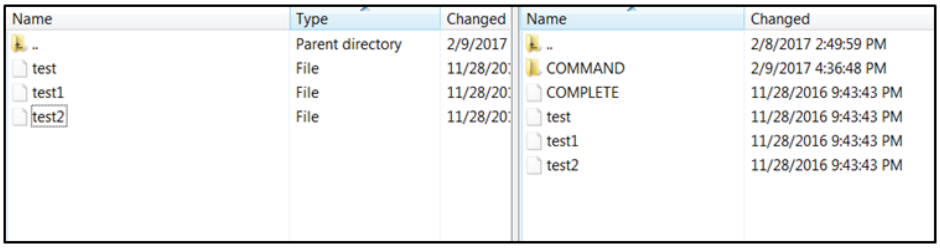
2. Transfer an empty file <filename>.complete (eg: test.complete) to the directory /<SFTP User>.

Figure 1–35 Transferring Empty File



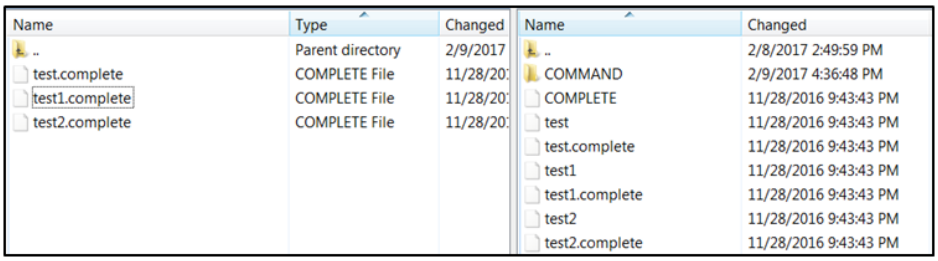
3. If multiple files have to be transferred, copy all the files to /<SFTP_user>.

Figure 1–36 Transferring Multiple Files



4. Transfer all the corresponding <filename>.complete files to the /<SFTP_user> directory for the transfer to complete.

Figure 1–37 Transferring .complete Files



Export File Downloads

Login to the WinSCP by following the Steps – Login to WinSCP section. The following is the download file process.

1. Change the directory to /<SFTP User>/EXPORT.
2. Download all data files.