

Oracle® Retail Advanced Inventory Planning
Administration Guide
Release 13.2

October 2010

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Oracle Retail Advanced Inventory Planning Administration Guide, Release 13.2.

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Preface

The *Oracle Retail Advanced Inventory Planning Administration Guide* describes the design and implementation of the Oracle Retail Advanced Inventory Planning (AIP) Online product. This document is intended for the retail client and system administrator of the online application

Audience

This document is intended for the administrators of Oracle Retail Advanced Inventory Planning. This may include merchandisers, buyers, and business analysts.

Documentation Accessibility

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Related Documents

For more information, see the following documents in the Oracle Retail Advanced Inventory Planning Release 13.2 documentation set:

- *Oracle Retail Advanced Inventory Planning Release Notes*
- *Oracle Retail Advanced Inventory Planning Administration Guide*
- *Oracle Retail Advanced Inventory Planning Implementation Guide*
- *Oracle Retail Advanced Inventory Planning Installation Guide*
- *Oracle Retail Advanced Inventory Planning Operations Guide*
- *Oracle Retail Advanced Inventory Planning Store Replenishment Planning User Guide*
- *Oracle Retail Advanced Inventory Planning Warehouse Replenishment Planning User Guide*
- *Oracle Retail Advanced Inventory Planning Data Management - Online Help*
- *Oracle Retail Advanced Inventory Planning Data Management User Guide*
- *Oracle Retail Advanced Inventory Planning Order Management - Online Help*
- *Oracle Retail Advanced Inventory Planning Order Management User Guide*
- *Oracle Retail Advanced Inventory Planning Data Model Volume 1 - Oracle Database Data Model*
- *Oracle Retail Advanced Inventory Planning Data Model Volume 2 - Measure Reference Guide*

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

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.1) or a later patch release (for example, 13.1.2). If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

http://www.oracle.com/technology/documentation/oracle_retail.html

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

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.

Application Overview

Advanced Inventory Planning (AIP) is a suite of products that are designed to manage the supply chain needs of large retailers, from interaction with their suppliers through various layers of warehouses down to individual stores and e-commerce sites. It couples time-phased replenishment and allocation algorithms to produce an actionable receipt plan over time. This is based on demand forecasts, replenishment parameters, and inventory availability at the numerous supply points within the supply chain.

Data Management Online

Data Management online has some main functions that are related to the physical movement of SKUs through the supply chain:

- Maintain supply points with appropriate order cycles for store orders from warehouses and suppliers
- Maintain multi tier supply points with appropriate order cycles for warehouses from suppliers and warehouses.
- Maintain shared data elements throughout the supply chain, such as pack sizes by warehouse

Order Management

Order Management allows you to create and edit purchase orders and view purchase orders or transfers from suppliers and warehouses.

Purchase orders are orders that are sourced directly from suppliers.

Transfers are orders that are sourced directly from a warehouse.

Orders exist in Order Management as a result of the following processes.

- You can manually create a purchase order in order management.
- Orders are automatically generated by AIP.

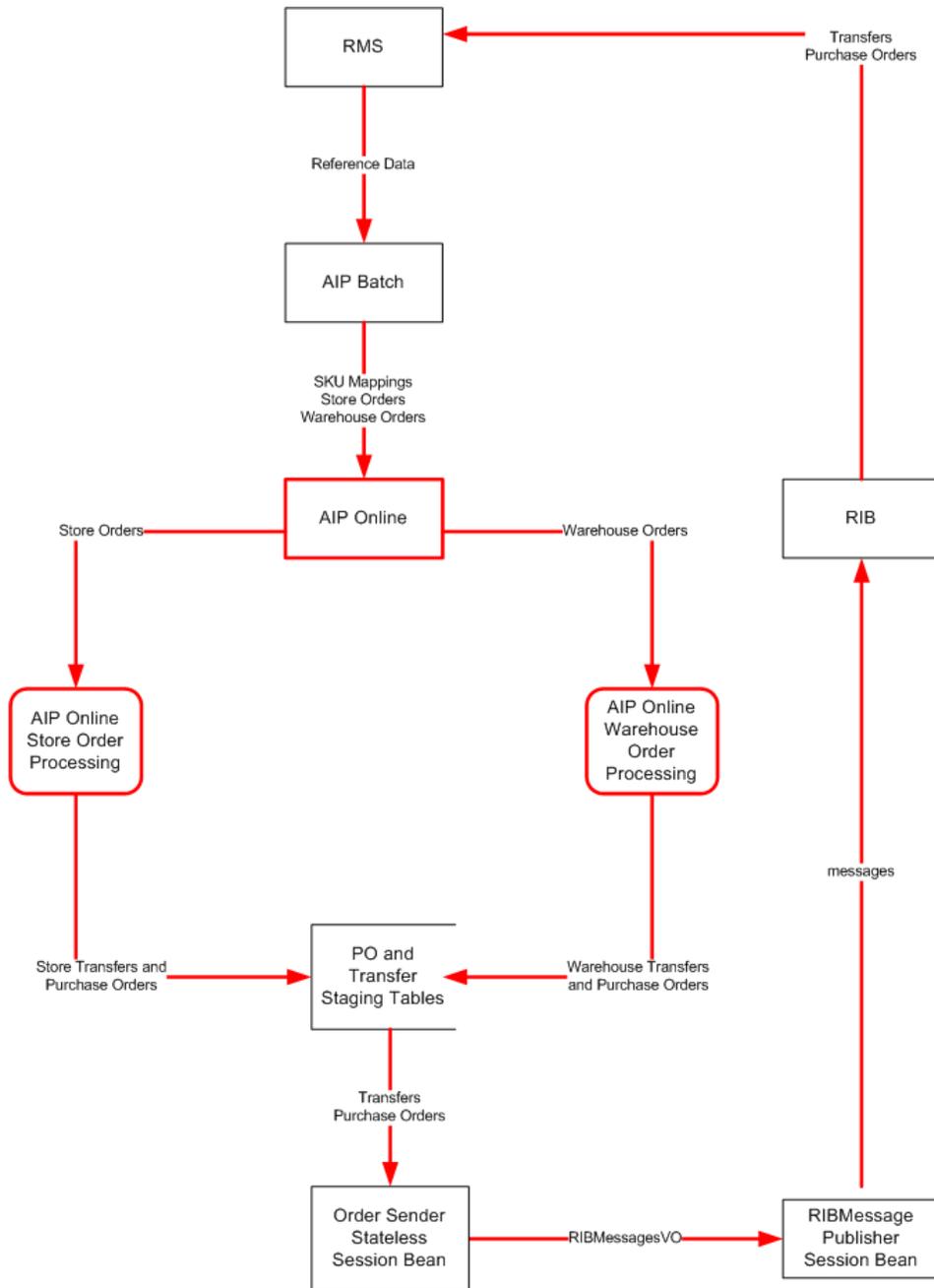
Purchase orders and transfers are available for review until a specified number of days after their release or delivery date.

Data Flow

Merchandise data is imported from a merchandise system. Imported data includes stores, suppliers, commodities, and warehouses.

Note: AIP 13.2 does not integrate with any version of the Retail Integration Bus (RIB). The re-integration of these systems is in development.

Figure 1-1 Data Flow



Set Up the Enterprise

System administration and AIP administration allows you to set up and maintain AIP for your enterprise. Through the Administration Consoles you can set up features and default values for your enterprise and the AIP application. You can maintain information at the enterprise and application level.

- **Enterprise:** The enterprise maintenance area allows you to incorporate corporate information into the AIP interface. You can also view services enabled for your enterprise.
- **Application:** The application maintenance area allows you to maintain the information that users can view in the system.

Security

Security rights for each user is defined at a user level and administrated in the Administration Console. For DM and OM there is user name and password-controlled access to the applications, data access restrictions that are based on assigned rights to classes, and screen-level access restrictions that are based on assigned privileges.

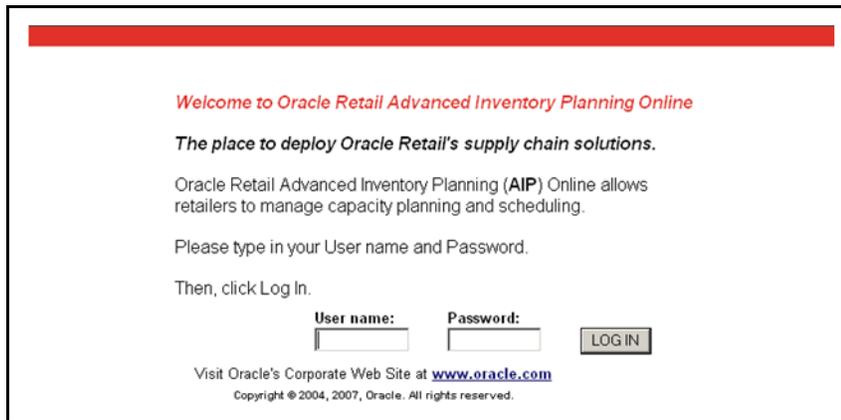
Note: Details for assigning the security parameters are in the following chapters.

Log on to the AIP Administration Console

AIP administration is secured by an administrator password. Only individuals with an administrator profile and password can log on to the system administration area of AIP.

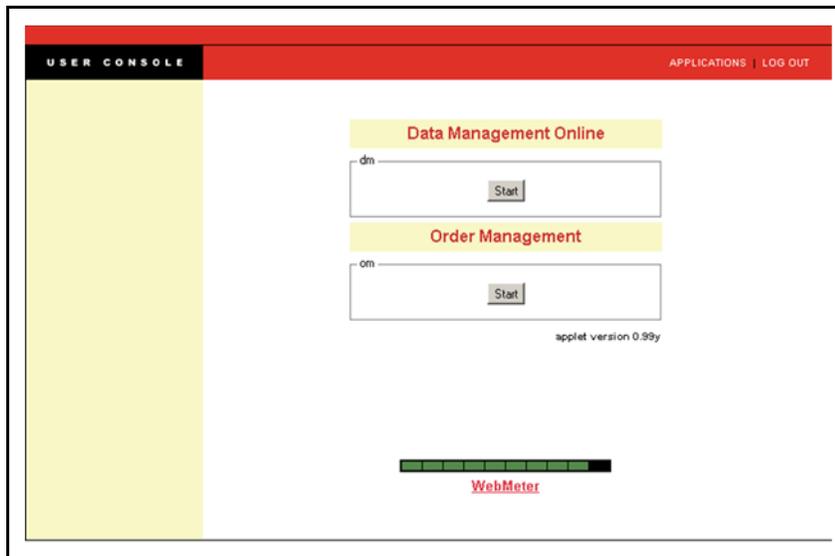
1. Access the AIP Login Window.

Figure 2–1 Login Window

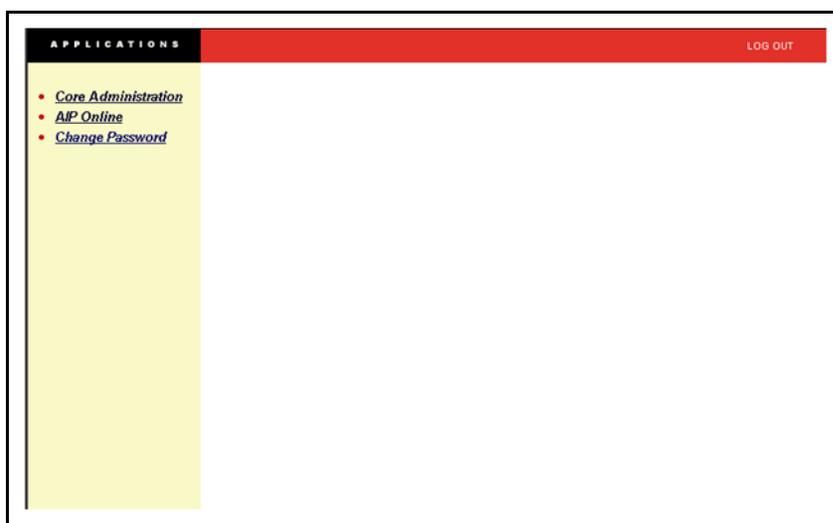
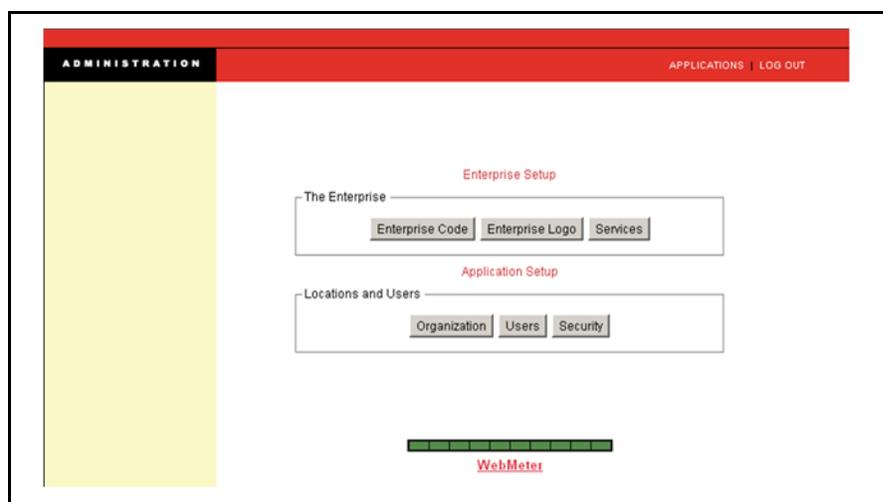


2. On the Login window, enter your user ID in the User Name field, enter your password in the Password field, and click **LOG IN**. The User Console appears.

Figure 2–2 AIP User Console



3. In the Applications area, click **Core Administration**. The Administration Console opens.

Figure 2–3 AIP Applications Area**Figure 2–4 AIP Administration Console**

AIP Administration

Set Up Enterprise Code

When your enterprise is established, an enterprise code or enterprise ID is set up to differentiate your organization from other enterprises set up on the exchange. You can update your enterprise code as necessary.

Set Up Enterprise Logo

You can maintain the company logo displayed in the AIP application. When you change the logo in the Set Logo window, the logo will be changed on the Administration Console and on the User Console.

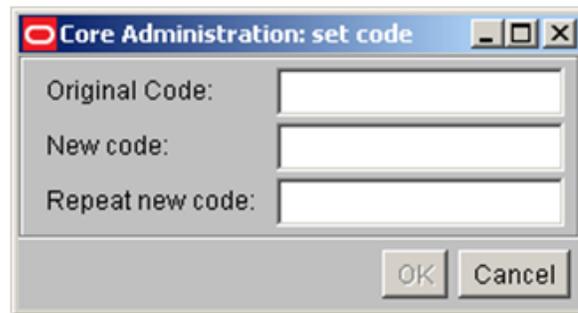
View Services

Your enterprise's e-service license agreement with Oracle Retail defines the number of users you are able to set up in your enterprise. You can view this information in the Services window.

Change the Enterprise Code

1. On the AIP Administration Console, click **Enterprise Code**. The Set Code window is displayed.

Figure 2–5 Set Code Window



2. In the **Original Code** field, enter the code assigned to your organization by Oracle Retail.
3. In the **New Code** field, enter the new code.
4. In the **Repeat New Code** field, reenter the new code.
5. Click **OK** to save the new Enterprise code.

Add the Company Logo

1. On the AIP Administration Console, click **Enterprise Logo**. The Set Logo window dialog box is displayed.
2. Click **Choose Logo**.
3. Navigate to and select the file containing the image of your logo.

Note: The logo image file must be a .gif, .jpeg, or .jpg.

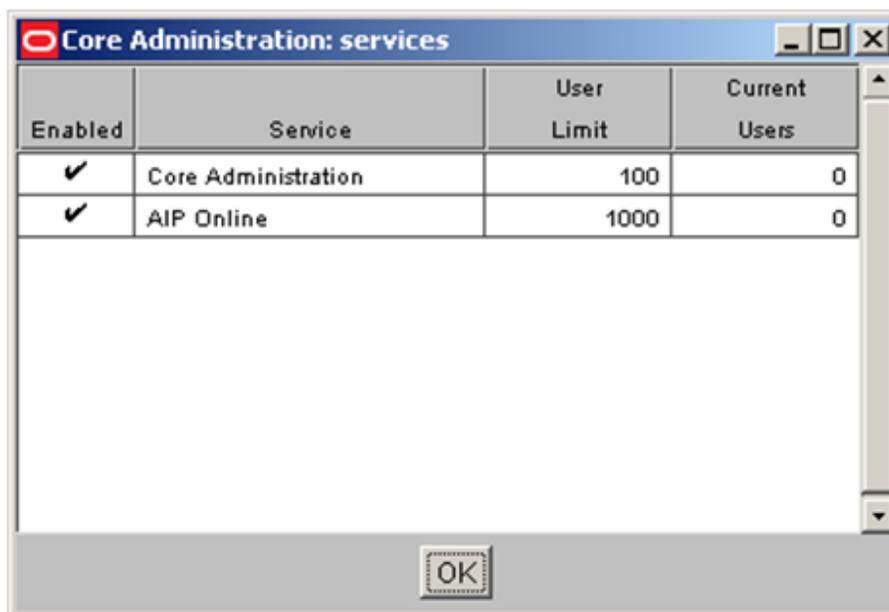
4. Click **Open**.
5. Click **Update Logo**.

Note: After you click **Update Logo**, you cannot cancel your changes.

View e-services Subscription Information

Navigate: On the AIP Administration Console, click **Services**. The read-only Services window is displayed.

Figure 2–6 Services Window



Enabled	Service	User Limit	Current Users
✓	Core Administration	100	0
✓	AIP Online	1000	0

OK

1. On the Services window, you can:
 - View the subscription information for your enterprise. A check mark in the Enabled column indicates that you can access that e-service in your current subscription agreement.
 - View the number of users at your Enterprise that can use each e-service.
 - View the current number of users at your Enterprise configured for each e-service.

Note: The software license counts each user once. If an administrator also configures a user account for him or herself, both accounts are counted.

2. To change your service user limit, contact Oracle Retail Customer Support.
3. After viewing the information, click **OK** to close the window.

Set Up the Application

You can set up information pertaining to security privileges.

Log on to the System Administration Console

System administration is secured by an administrator password. Only individuals with an administrator profile and password can log on to the system administration area of AIP.

1. At the standard application login the "address" or URL should be modified to include "phantasm" after the AIP online location:
<http://servername:port/aiponline/phantasm>
2. On the Oracle Retail Login window, enter your user ID in the User Name field.

Figure 3–1 Oracle Retail Login Window



Welcome

Multiprise system administration

Please type in your User name and Password.

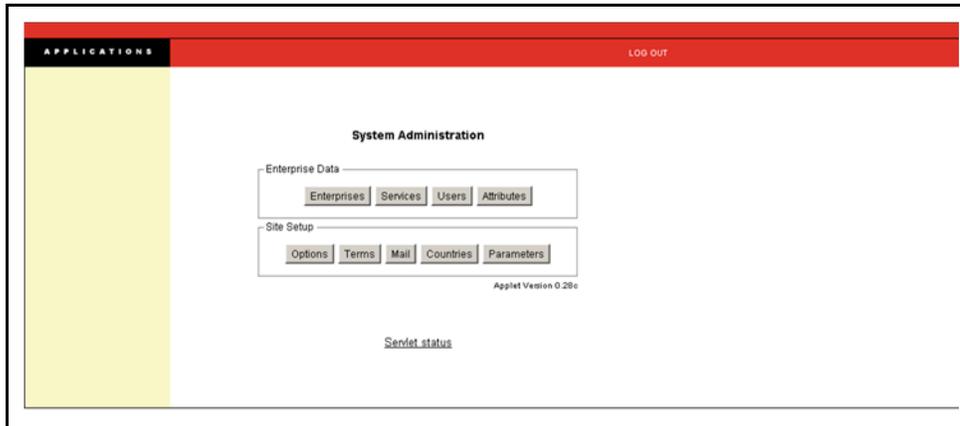
Then, click Log In.

User name:

Password:

LOG IN

3. In the Password field, enter your password.
4. Click **Log In**. The System Administration Console opens.

Figure 3–2 System Administration Console

Set Up System Security

Each user must have their application permissions granted by the administrator. The administrator can choose to set up default selections, remove options, or create new security roles. The security setup will be used during the set-up and maintenance of each user's security permissions.

The creation of screen privileges will be provided in the installation. Application upgrades may also provide new screen privileges when necessary. The table for the permission list is WT_SRVUSERTYPES. Permission groups will be defined only by the client, either during implementation or later.

Setting a privilege as a default will cause the privilege to be defaulted as a "selected" security option when the security privileges are displayed for a new user.

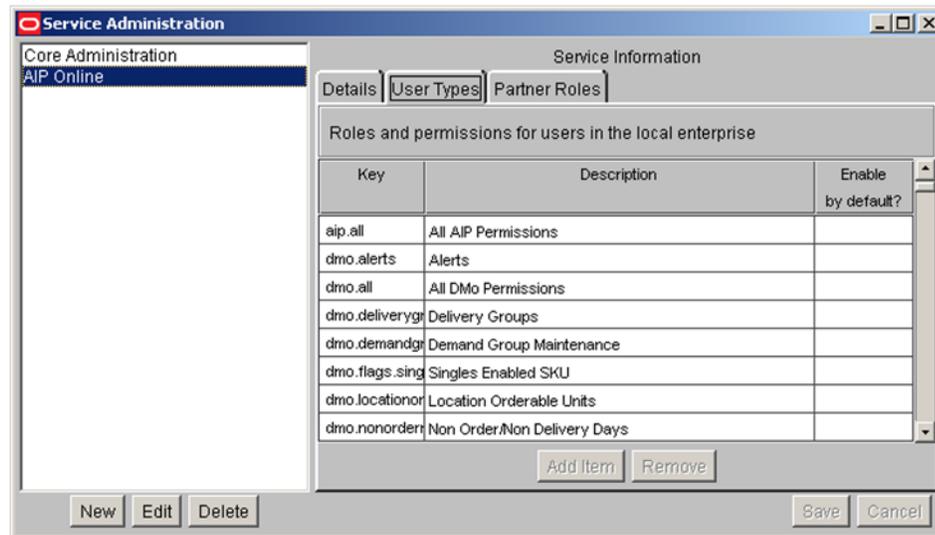
Adding a new permission group will allow you to set up groups of screen privileges which can be assigned to users. Assigning a permission group to a user grants them permission to all privileges assigned to the permission group. This provides a way to mass assign privileges. The permission group must first be created in the System Administration console before screen privileges can be assigned to the group.

Removing a privilege or permission group will prevent the privilege from being displayed as a user security privilege. This will prevent you or other administrators from assigning the privilege to any users.

Create a Default Privilege

Navigate: On the System Administration Console, click **Services**. The Services Administration window opens.

Figure 3–3 Services Administration Window -User Types Tab



1. Select **AIP Online** in the services list.
2. Click the **User Types** tab.
3. Click **Edit**.
4. Click the **Enable by default** column next to the appropriate permission.
5. Click **Save**.

Delete a Default Privilege

Navigate: On the System Administration Console, click **Services**. The Services Administration window opens.

1. Select **AIP Online** in the services list.
2. Click the **User Types** tab.
3. Click **Edit**.
4. Click the check mark in the **Enable by default** column next to the appropriate permission. The check mark is removed.
5. Click **Save**.

Create a Permission Group

Navigate: On the System Administration Console, click **Services**. The Services Administration window opens.

1. Select **AIP Online** in the services list.
2. Click the **User Types** tab.

3. Click **Edit**.
4. Click **Add Item**.
5. Enter a key in the field.

Note: The key must start with **sec:** to be recognized as a permission group.

6. Enter a description.
7. Determine the desired default option.
8. Click **Save**.

Delete a Permission Group

Navigate: On the System Administration Console, click **Services**. The Services Administration window opens.

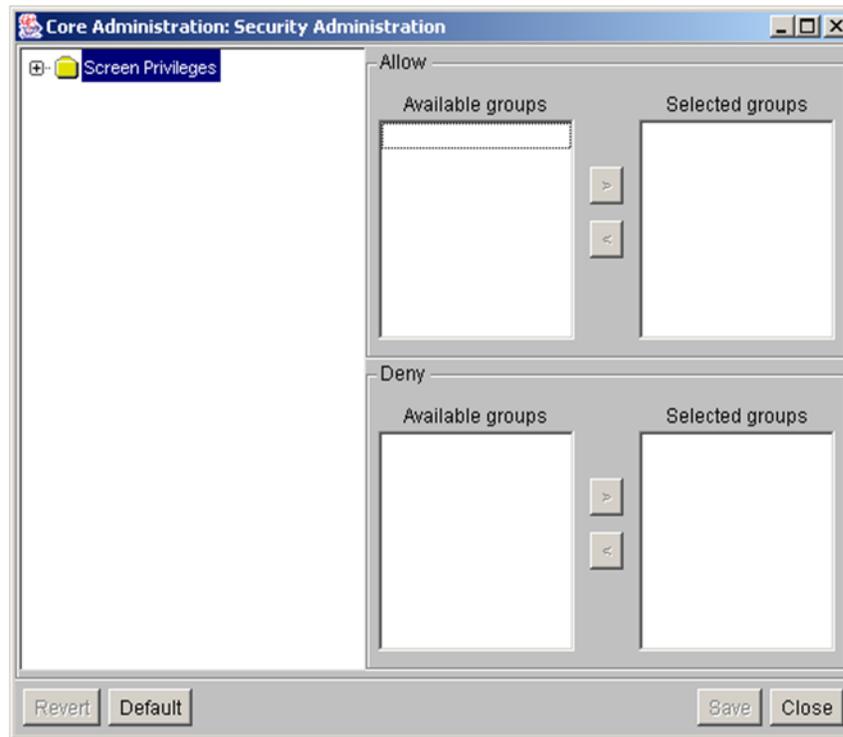
1. Select **AIP Online** in the services list.
2. Click the **User Types** tab.
3. Click **Edit**.
4. Select the permission group to be deleted.
5. Click **Remove**.
6. Click **Save**.

Set Up Permission Groups

Permission groups are created in the System Administration console. Once created, you can assign privileges to them. By assigning privileges you are creating groupings of privileges that can be assigned to a user en masse rather than individually picking each privilege and assigning it to the user. This also provides a type of mass maintenance capability. By adding a privilege to a permission group you are automatically assigning the privilege to every user which is assigned the permission group. Similarly, removing a privilege from the permission group denies that privilege to all users which are assigned the permission group.

Assign Privileges to a Permission Group

Navigate: On the AIP Administration Console, click **Security**. The Security Administration window opens.

Figure 3–4 Core Administration Window

1. Click + to display the screen privileges
2. Select a screen privilege
3. In the Allow Available groups select a permission group to be assigned to the screen privilege.
4. Click > to move the permission group to the Allow Selected groups list.
5. Click **Save**.

Delete Privilege from Permission Group

Navigate: On the AIP Administration Console, click **Security**. The Security Administration window opens.

1. Click + to display the screen privileges
2. Select a screen privilege
3. In the Allow Selected Groups, select a permission group to be removed from the screen privilege.
4. Click < to move the permission group to the Allow Available groups list.
5. Click **Save**.

Set Up Users

Each user must be set up by an administrator. There are two types of users, administrators and users. Administrators have access to and can maintain the administration console. There must be at least one system administration user. This user is created during implementation and has the access to create new privilege types as described below.

Users have access to the User Console of AIP. They cannot maintain any of the system level settings. A user's permissions may be further limited by scope set by the administrator. Scope defines which departments a user has access to maintain tracks for.

Note: When you set up the users, you assign local user types.

User Definition

User Name Restrictions

- Must be a minimum of 1 and a maximum of 16 characters in length
- May contain any characters, which means that symbols, including spaces, are allowed
- Must be unique

Password Restrictions

- Must be a minimum of 6 and a maximum of 128 characters in length
- Must have at least five different characters
- Must not be simple; The following are not allowed:
 - Sequences (ABCDE or ABCXYZ)
 - Four consecutive characters as this results in "pairing" (ABCDEF results in give pairs AB, BC, CD, DE, EF)
- Must not be easily derivable from the user name or full name
- Must not be easily derivable from the previous password
- Must not be derivable from a dictionary entry (the dictionary is configurable)

The rules are defined via the `opt/rfp/properties/security.properties` file. The format of this is:

- Password:
- `trackeradmin.prop.pwrules.code=uk.co.webtrak.security.passwords.rules.simple.Checker`
- `trackeradmin.prop.simplepw.dictionary=pw_dictionary`

Failed Login Lockout

Three invalid entries of a password for a given user ID within twenty-four hours turns off that user ID for five days. The password must be reset using the enterprise administrator screen shown above.

The properties for setting the parameters, the number of failed login tries, and the number of days locked out can be set in the `opt/rfp/properties/security.properties` file:

Lockout Parameters

```
trackeradmin.prop.password.lockout.count=3
trackeradmin.prop.password.lockout.interval=20m
trackeradmin.prop.password.lockout.wait=3d
```

Auditing

Security changes and session activity are recorded in an audit table (ENT_AUDIT).

Note: Password cycling, failed logins, and so on are driven from this table. It is important to recognize the impact of clearing this table too frequently

`opt/rfp/properties/security.properties` file setting:

Auditing (On or Off)

```
trackeradmin.prop.audit=1
```

Password Cycling

A password may be set to NOT be reused within 'N' changes or 'M' days. For example:

- If an "N" change is set to 5, the first password cannot be used on turns 2, 3, 4, or 5; however, the first password can be used again in turn 6.
- If an "M" change is set to 3, the same password cannot be used again in the space of days.

These parameters are specified via the `opt/rfp/properties/security.properties` file.

Note: The history used to validate these parameters is the audit table (ENT_AUDIT). See the Auditing section above.

Uniqueness parameters:

```
trackeradmin.prop.password.uniqueness=1
trackeradmin.prop.password.uniqueness.interval=120d
```

Here the password can be reused every time or after 120 days

Password Aging

The aging of passwords can be set to be seconds, minutes, hours, or days. The settings are specified via the `opt/rfp/properties/security.properties` file. See the following format:

Password Expiry

```
trackeradmin.prop.passwordexpiry=300s
```

In this example the password expires in five minutes.

Tables Referenced

ENT_ATTRS

ENT_AUDIT

ENT_LOCATIONS

ENT_LOCKS

ENT_MCLDATA

ENT_MCLHEADINGS

ENT_PARAMETERS

ENT_PARAMVALUES

ENT_PARTNERDEPTS

ENT_PARTNERS

ENT_PHASES

ENT_RESOURCES

ENT_SEASONS

ENT_SRVUSERTYPES

ENT_STAMPS

ENT_USERS

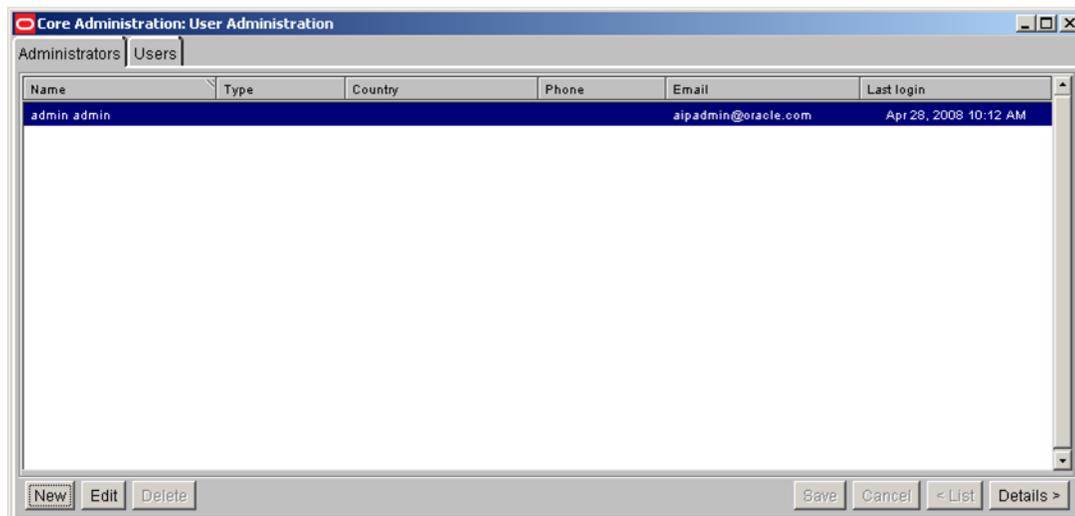
Properties Files

`opt/rfp/properties/security.properties`

Add an Administrator

Navigate: On the AIP Administration Console, click **Users**. The User Administration window opens.

Figure 3–5 User Administration Window - Administrators Tab List View



1. Click **New**. The details view of the Administrators tab is displayed.

Figure 3–6 User Administration Window - Administrators Tab Detail View

2. Enter necessary information in the fields. Required fields are:
 - First Name and Last Name
 - E-mail
 - Username
 - New Password
 - Retype New Password

Note: Save is not enabled until all required entries are made.

3. Click **Save** to save the changes.
4. Click **Close Window** to return to the Administration Console window.

Edit an Administrator

Navigate: On the AIP Administration Console, click **Users**. The User Administration window opens.

1. Select the name of an administrator.
2. Click **Edit**. The details list is displayed.
3. Update the information as necessary.
4. Click **Save** to commit the changes.
5. Click **Close Window** to return to the Administration Console window.

Delete an Administrator

Navigate: On the AIP Administration Console, click **Users**. The User Administration window opens.

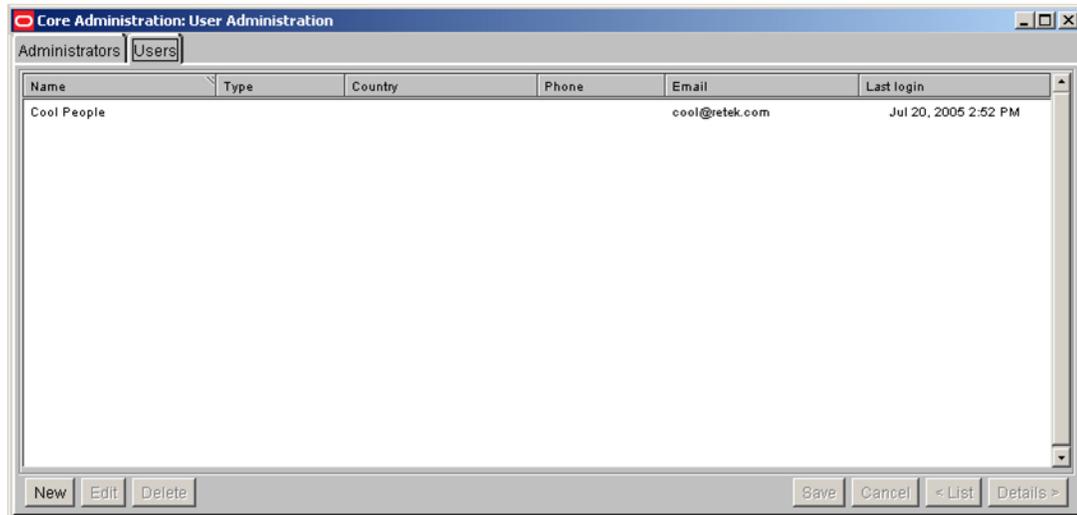
1. Select the name of an administrator. All contact information is highlighted.
2. Click **Delete**. A dialog box is displayed to confirm your decision.
3. To proceed, click **OK**. The administrator's name is deleted from the list.
4. Click **Close Window** to return to the Administration Console window.

Add a User

Navigate: On the AIP Administration Console, click **Users**. The User Administration window opens.

1. Click the **Users** tab. The Users list is displayed.

Figure 3–7 User Administration Window - Users Tab List View



2. Click **New**. The details view of the Users tab is displayed.

Figure 3–8 User Administration Window - Users Tab Details View

3. Add user details.

On the Details tab, enter necessary information about the new user. Entries are required in these fields:

- First Name
- Last Name
- E-mail
- Username
- New Password
- Retype New Password

4. Define a user's scope

- Select the **Scope** tab. The Scope tab is displayed.
- In the **Available Classes** list, click on a class name to be assigned to the user. At least one Class is required to create a user.
- Click > to move the class to the Selected Class list.
- To remove a class from the Selected Classes list, select the class name. The Left Arrow at the center of the window is enabled. Click < to return the class to the Available Classes list.

Note: Save is not enabled until there are entries in all required fields.

5. Define a user's system permissions

- Select the **Permissions** tab. The Permissions tab is displayed.
- In the **Enabled** column, select **AIP** from the list of Services. The Available Types column lists the user roles for your enterprise.
- In the **Available Types** list, select the role that applies to this user.

Note: The permission groups are listed along with each individual screen privilege. The selected individual screen privileges along with the screen privileges assigned to any selected permissions groups comprise the list of the users security permissions.

- Click > to move the role to the **Selected Types** list.

6. Click Save to commit your changes.

7. Click **Close Window** to return to the Administration Console window.

Edit User Information

Navigate: On the AIP Administration Console, click **Users**. The User Administration window opens.

1. Select the **Users tab**. The Users list is displayed.
2. Select the user name you wish to edit.
3. Click **Edit**. The Details tab is displayed with the entry fields enabled.
4. Change the information in any or all of the entry fields.
5. Click **Save** to save the changes.
6. Click **Close Window** to return to the Administration Console window.

Delete a User

Navigate: On the AIP Administration Console, click **Users**. The User Administration window opens.

1. Select the **Users tab**. The Users list is displayed.
2. Select the name you wish to delete.
3. Click **Delete**. You are prompted to confirm your decision.
4. Click **OK**. The selected user is deleted from the list and the database.
5. Click **List** to return to the Users tab list view. The user's name is deleted from the list.
6. Click **Close Window** to return to the Administration Console window.

Privileges

Access Control

Rights are assumed to be denied unless explicitly assigned. Permissions exist for granting all rights within a given application or across the AIP suite.

For Data Management and Order Management, all fields within the windows in inaccessible tabs are disabled. An alert message displays when a user attempts to access an unassigned or denied tab. The message indicates that this area is not accessible for the user.

Note: This alert message will not display if the tab is the default selection in a selected area.

Message: The security privileges of the current user do not grant access to this functionality.

Table for permission list is WT_SRVUSERTYPES.

Privileges

Key	Description
aip.all	All AIP Permissions
dmo.alerts	Alerts
dmo.all	All DMO Permissions
dmo.deliverygroups	Delivery Groups
dmo.demandgroupmaintenance	Demand Group Maintenance
dmo.locationorderableunits	Location Orderable Units
dmo.nonordernondelivery	Non Order/Non Delivery Days
dmo.nonrelease	Non Release/Non Receipt Days
dmo.onsupplyoffsupply	On Supply/Off Supply
dmo.ordercyclecreation	Order Cycle Creation/Maintenance
dmo.ordercycle	Order Cycle
dmo.ordergroups	Order Groups

Key	Description
dmo.pallet.order.multiples	Pallet Order Multiples
dmo.planninghorizon	Planning Horizon
dmo.profilecopyexceptions	Copy Profile Exceptions
dmo.profilereleaseplacement	Profile Release and Placement Schedule Exceptions
dmo.profiles.department	Class to Profile Assignment
dmo.profiles.planninggroup	Planning Group Maintenance
dmo.profiles.supplyprofiles	Supply Profiles
dmo.promstartenddates	Promotional Start and End Dates
dmo.rangingwarehouse	Ranging
dmo.receipt.avail.leadtimes	Receipt to Availability Lead Time
dmo.receivingwindows	Receiving Windows
dmo.release.placement.schedule	Release And Placement Schedule Exceptions
dmo.release.profile.store	Profile - Store Schedule Exceptions
dmo.siteandchamber	Scheduling Location Maintenance
dmo.skukeeptogether	SKU Keep Together
dmo.skureleaseschedule	SKU Release Schedule Exceptions
dmo.slotsandshifts	Slots and Shifts
dmo.sourcesplits.timebalanced	Time Balanced Supply Source Splits
dmo.stockless.ind.exceptions	Stockless Indicator Exceptions
dmo.storeformatpacksize	Store Format Packsize Defaults
dmo.storepriority	Store Priority
dmo.storereceivingcalendar	Store Receiving Calendar
dmo.storesource	Store Source
dmo.storesource.massmaintenance	Store Source Mass Maintenance
dmo.supplierlocks	Supplier Locks
dmo.warehouse.coupled	Warehouse Coupled Flag
dmo.warehousecalendar	Warehouse Calendar
dmo.whstoreorderingschedules	WH and Store Ordering Schedules
dmo.secondary.sources	Secondary Sources
dmo.scalinggroups	Supplier and Container Scaling Groups
dmo.skuattributes	SKU attributes
om..all	All Order Management Permissions
om.ordercreation	Order Creation
om.ordermaintenance	Order Maintenance
om.orderreview	Order Review
om.scalinggrouppreview	Scaling Group Order Reivew

Caching

Data objects that are used in more than one screen are usually cached. Those that are used in a single screen are not usually cached. The data cache resides on the client layer, so the contents are specific to the data that is requested by a given user. When cached data is updated, all attributes are updated, such as name, flags, and so on.

Cached Data

The following is a list of cached data:

- Commodity
- CommodityPackSize
- DeliveryGroup
- DemandGroup
- Class
- NetworkGroup
- OrderCycle
- OrderGroup
- PlanningGroup
- ProductType
- Profile
- ReceivingWindow
- Shift
- Slot
- StockingPoint
- StockingPointStatus
- Store
- StoreFormat
- StoreOrderCycle
- Supplier
- SupplierCommodityPackSize
- SupplierLocation

Cached Data Update

In [Table 4-1](#):

- The first column defines cached data status.
- The first row defines how data are retrieved.
- The second row defines retrieved data status.
- Each cell defines whether the cached data is updated.

Table 4-1 *Cached Data Update*

	Data Retrieved by Querying		Data Retrieved by Refreshing	
	No Timestamp Change	Timestamp Changed	No Timestamp Change	Timestamp Changed
Cached data unmodified	Do not update cached data	Update cached data	Do not update cached data	Update cached data
Cached data modified	Update cached data	Update cached data	Update cached data	Update cached data