# Oracle® Retail Merchandising Cloud Services

Administration Guide

Release 16.0.025

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Oracle Retail Merchandising Cloud Services Administration Guide, Release 16.0.025

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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.

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

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

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## 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. |
| *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:

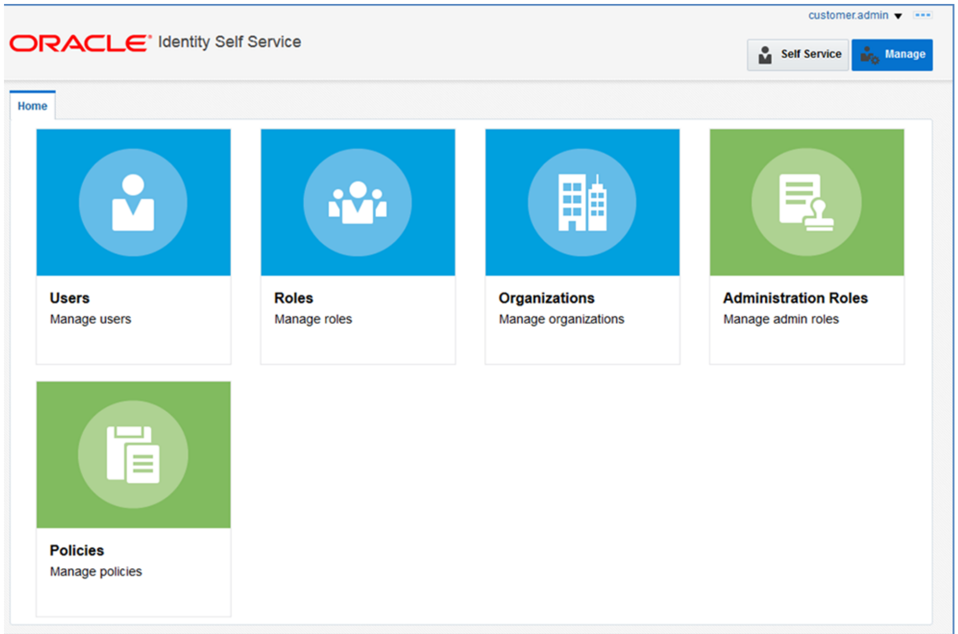
**https://support.oracle.com**

### 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*



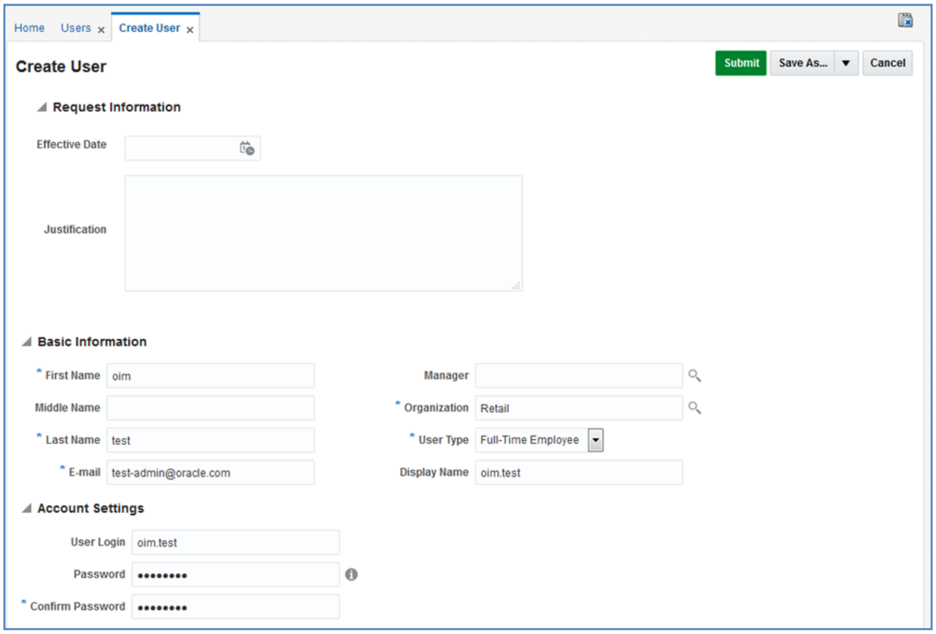

3. Under Actions, click **Create**.

*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***



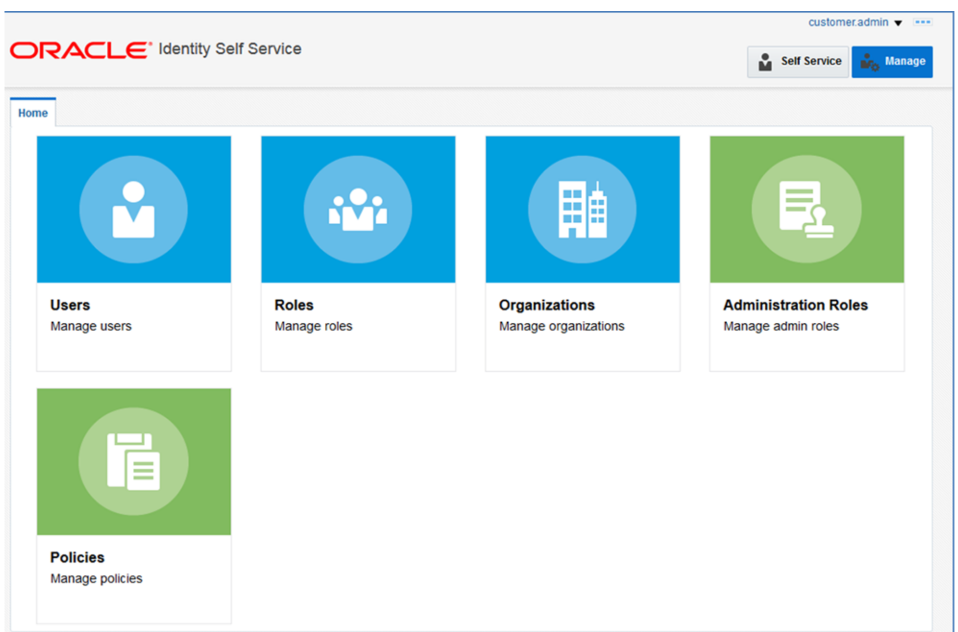

6. Click **Submit**.

## Assigning Members to a Role

To assign members to a role, complete the following:

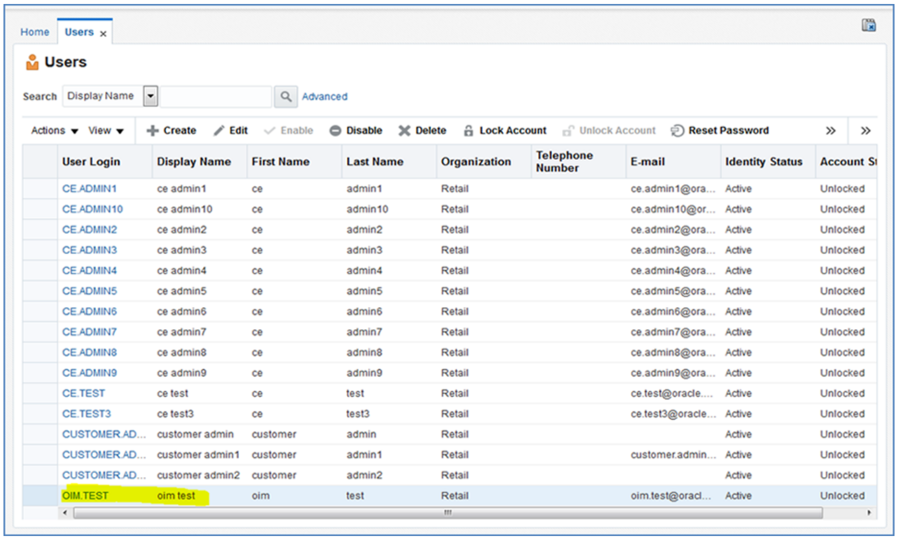
1. Log into the OIM application.
2. Click **Users**.

***Figure 1–4 Select Users***



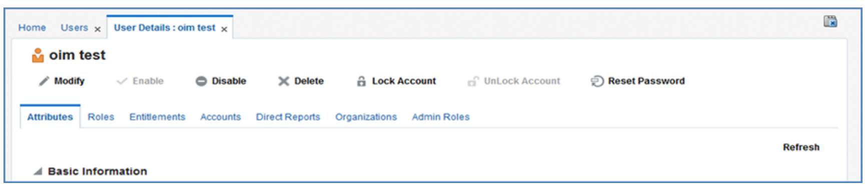

3. Click the oim.test user.

***Figure 1–5 oim.test User***



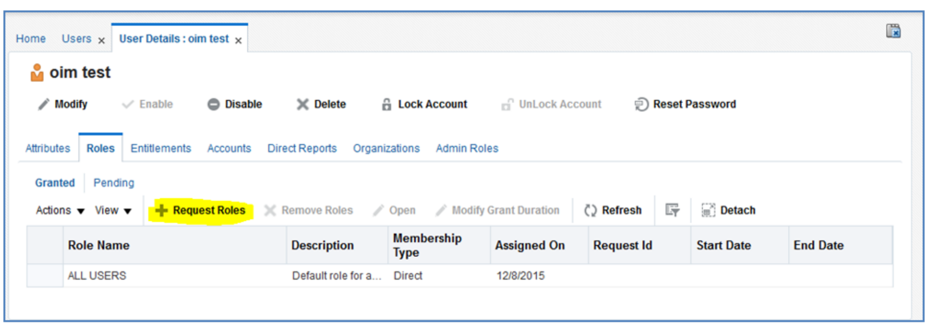

4. Click the Roles tab.

***Figure 1–6 Roles Tab***



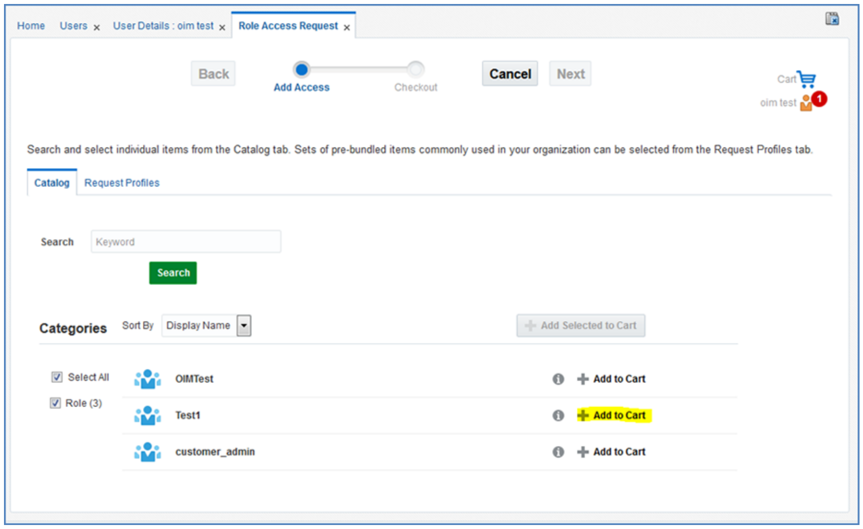

5. Click the **Request Roles** button.

***Figure 1–7 Request Roles Button***



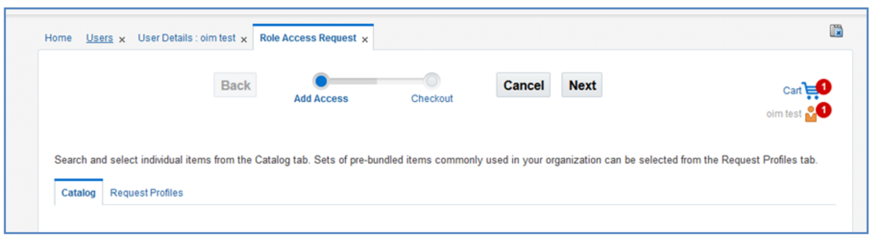

6. Click the **Add to Cart** button next to the role you want to assign.

***Figure 1–8 Adding Roles to the Cart***



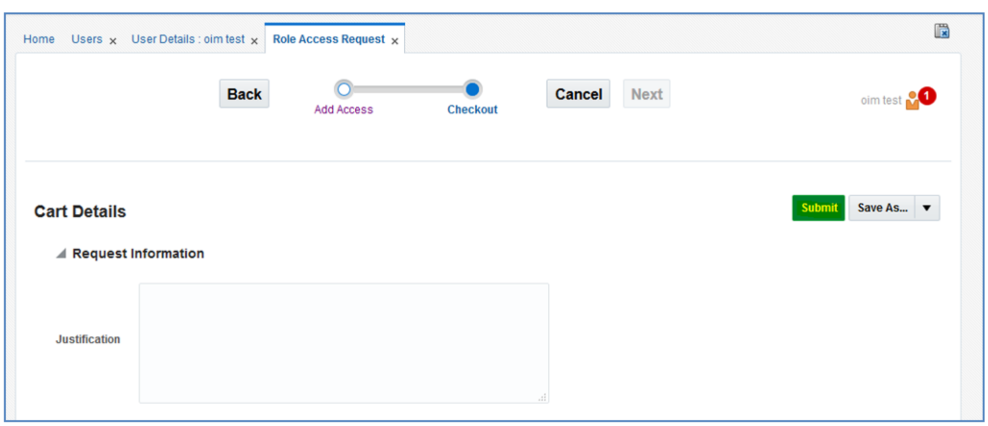

7. Click **Next**.

***Figure 1–9 Add Access Request***



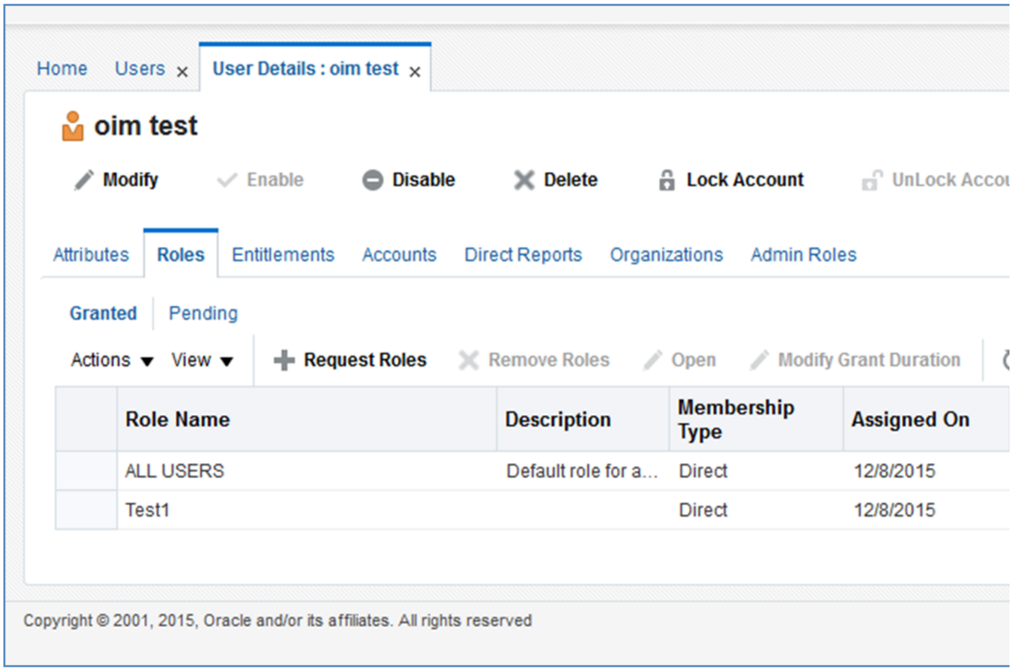

8. Click **Submit**.

***Figure 1–10 Submit Access Request***




The role is now assigned to the User.

*Figure 1–11 User Details*




## Retail Merchandising 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:

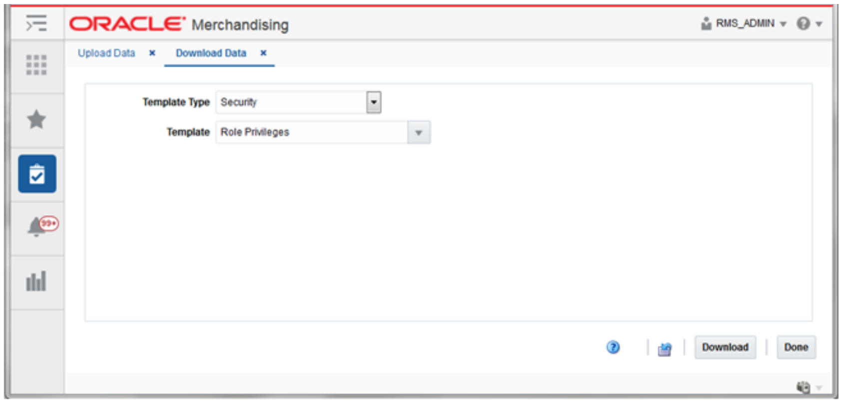
- Role Privileges
- Security Group Attribute
- Security User and Security User Role
- Security User and Security Group mapping information
- Merchandise Hierarchy LOV filtering access information

### Setup Role Privileges

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

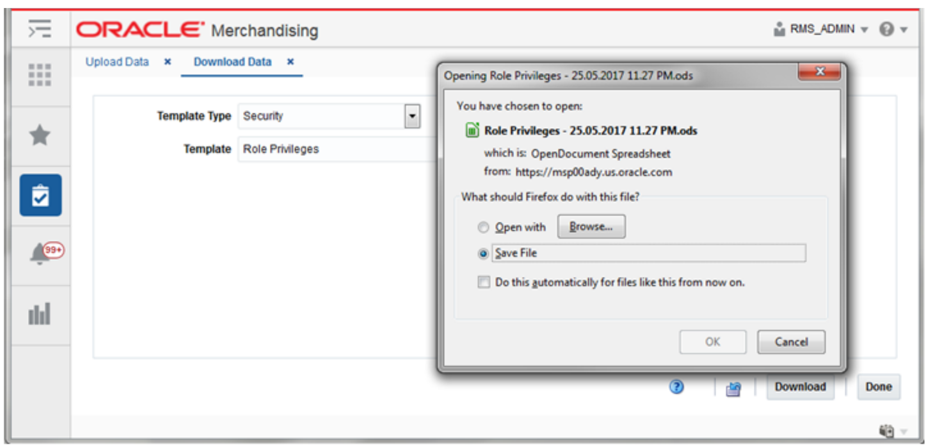
1. Log into the RMS Application.
2. Navigate to Foundation Data > Data Loading > Download.
3. In the Download Data screen, select:
   - Template Type as 'Security'
   - Template as 'Role Privileges'

***Figure 1–12 Download Security Privileges Template Spreadsheet***



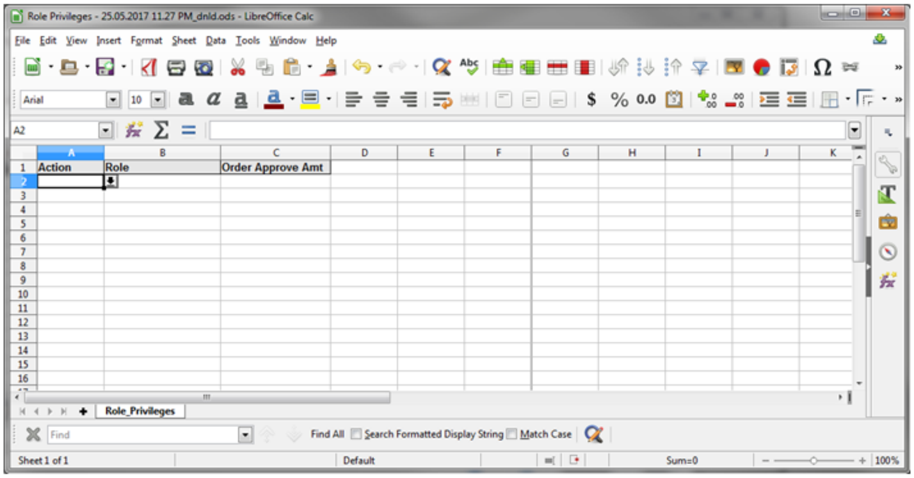

4. Click the **Download** button.
5. Save File to the local directory location when prompted.

***Figure 1–13 Save File***



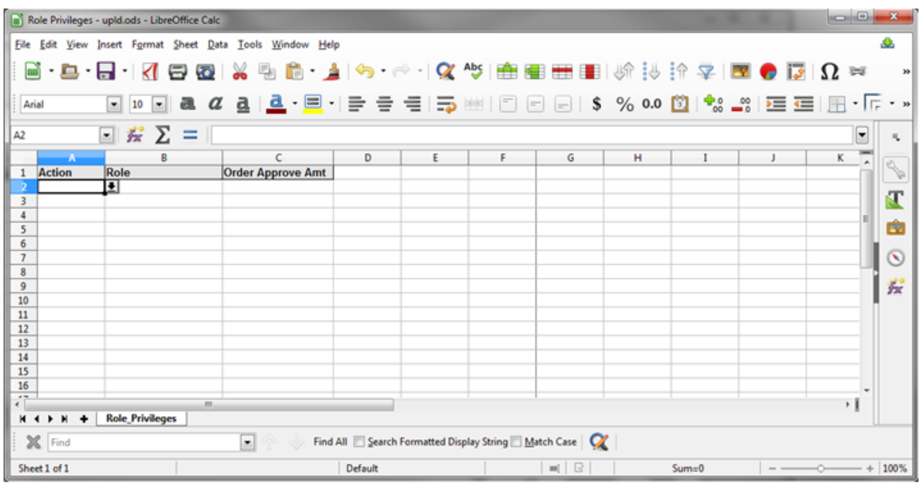

6. Click the **Done** button.
7. Open the downloaded file.

***Figure 1–14 Open File***




**8.** Save As < file name>.

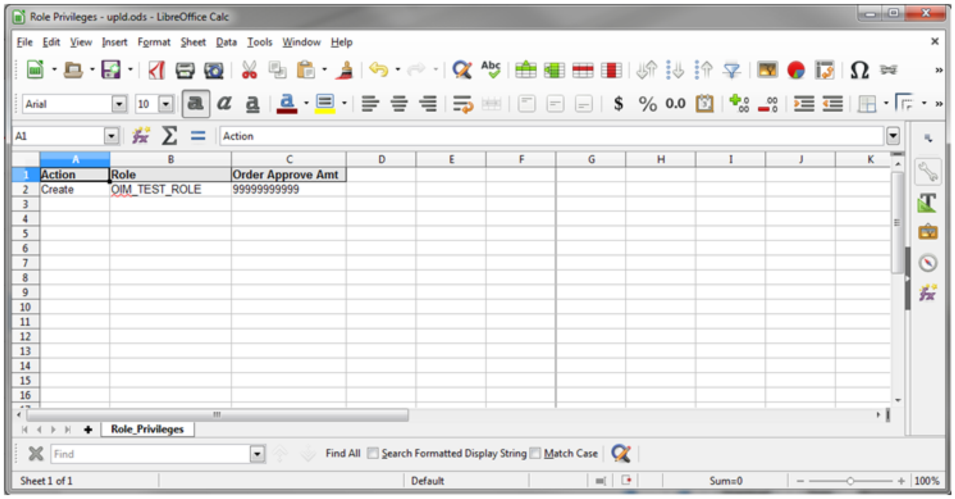
***Figure 1–15 Save as <File Name>***




**9.** In the Security_Groups tab, enter/select the following:

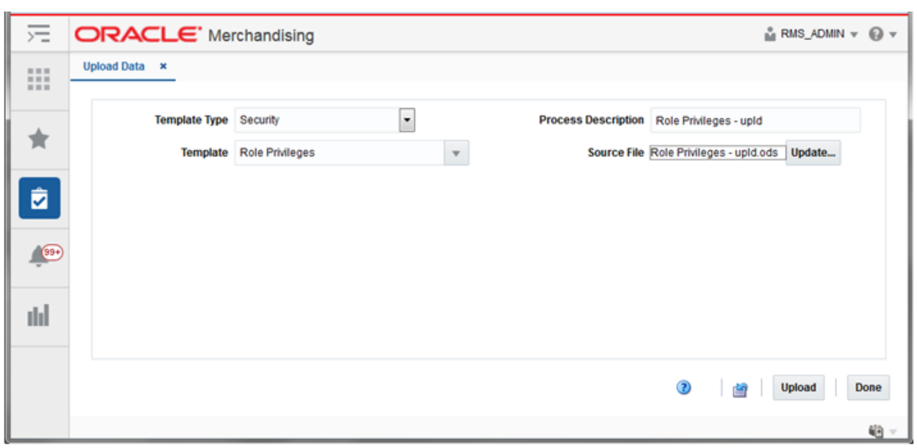
- Action: 'Create'
- Role: <Role>
- Order Approve Amt: < Upper limit that the role will be able to approve on an order

***Figure 1–16 Enter Role Privileges information***



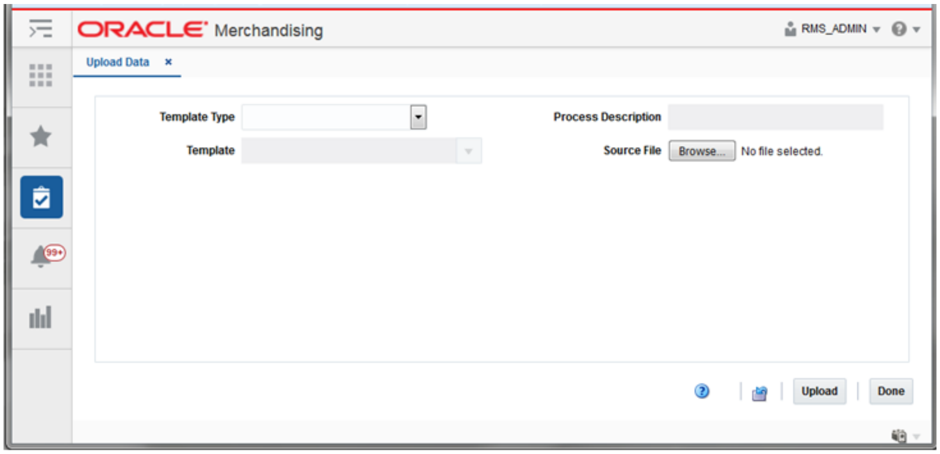
10. Save and Close the file.
11. In the RMS Application, navigate to Foundation Data > Data Loading > Upload.
12. In the Upload Data screen, select:
    - Template Type as 'Security'
    - Template as 'Role Privileges'
    - Enter new Process Description or retain as is
    - Browse and select the Source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

***Figure 1–17 Upload Role Privileges Information***



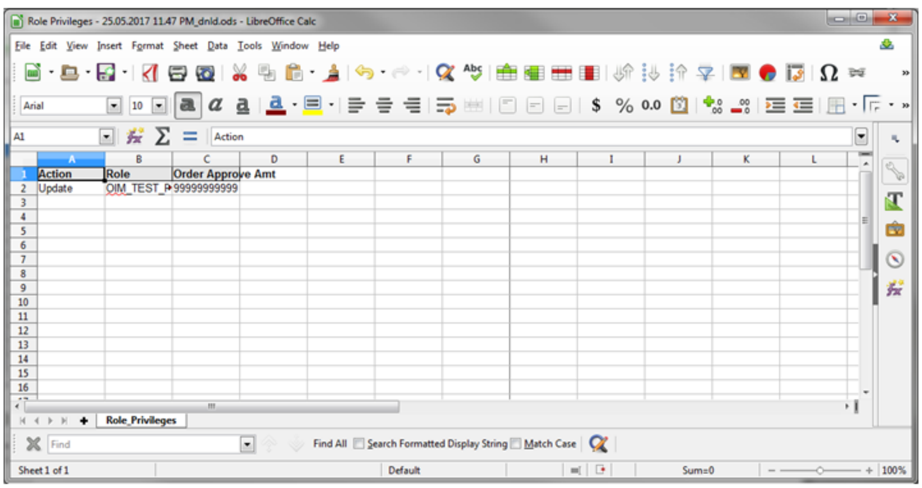
13. Click the **Upload** button.

***Figure 1–18 Upload Role Privileges Information Complete***




14. Click the **Done** button..
15. View the newly created Role Privileges by downloading the Role privileges spreadsheet (Steps 2 - 7).

***Figure 1–19 View Newly Created Role Privilege***

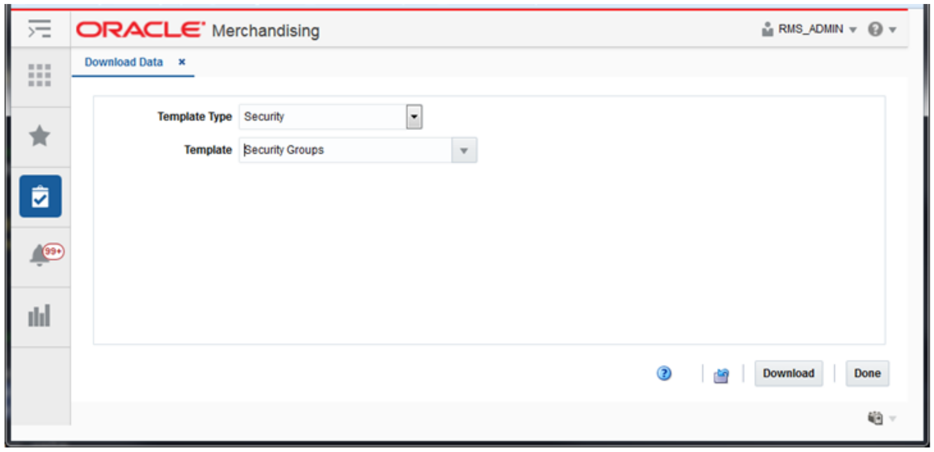



## Setup Security Group Attribute

Perform the following procedure to define a Security Group in the system.

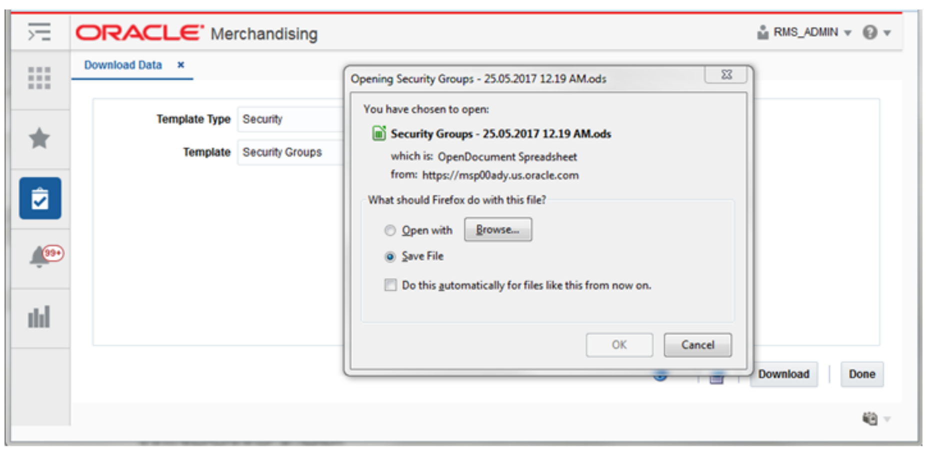
1. Navigate to Foundation Data > Data Loading > Download.
2. In the Download Data screen, select Template Type as 'Security' and Template as 'Security Groups'.

***Figure 1–20 Download Security Groups Template Spreadsheet***



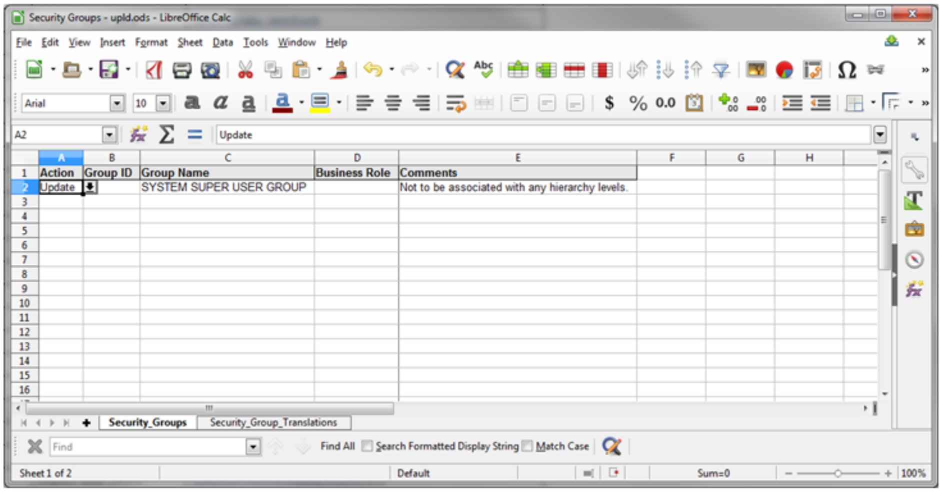

3. Click the **Download** button.
4. Save File to a local directory location when prompted.

***Figure 1–21 Save File***




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

**Figure 1–22 Open File**

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**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.

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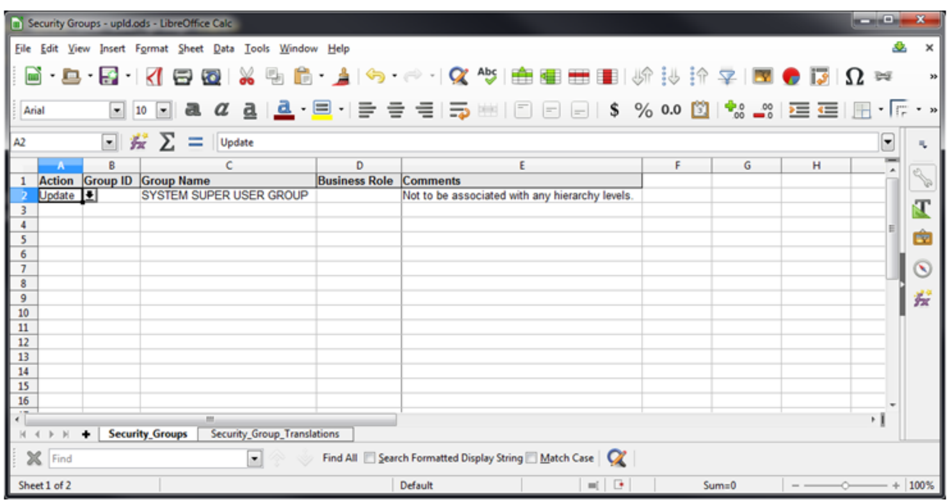
7. Save As < file name>.

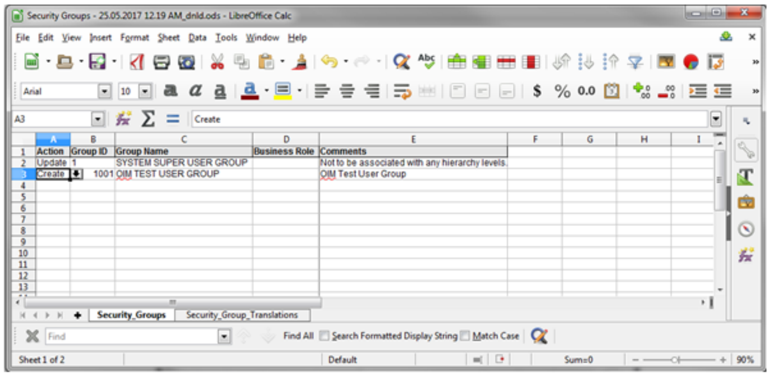
**Figure 1–23 Save as <File Name>**




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)

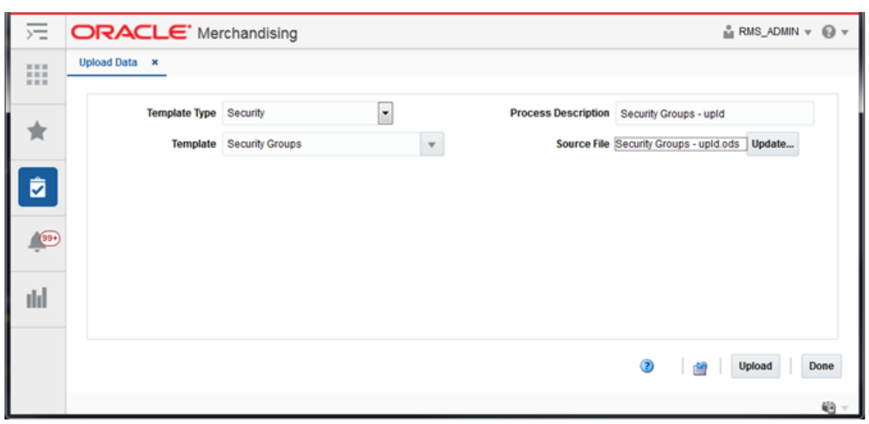
9. In the Security_Groups_Translations tab, enter the translated Security Group descriptions (optional).

**Figure 1–24 Enter Security Groups information**



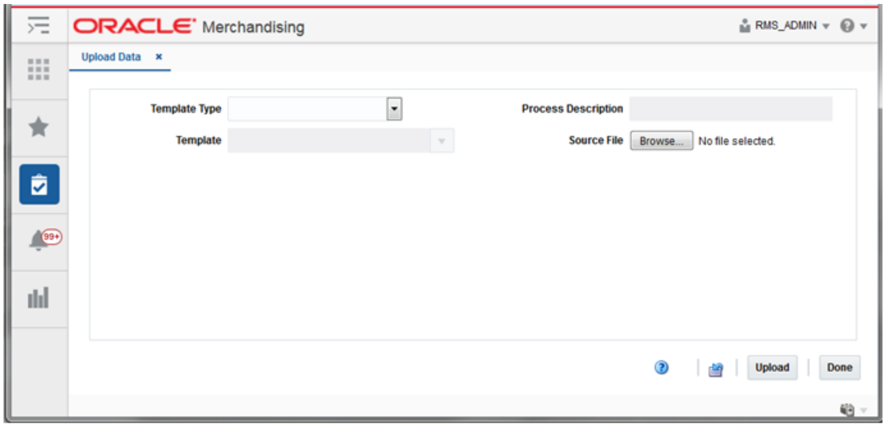
10. Save and Close the file.
11. In the RMS Application, navigate to Foundation Data > Data Loading > Upload.
12. In the Upload Data screen, select:
    - Template Type as 'Security'
    - Template as 'Security Groups'
    - Enter new Process Description or retain as is
    - Browse and select the Source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

**Figure 1–25 Upload Security Groups Information**



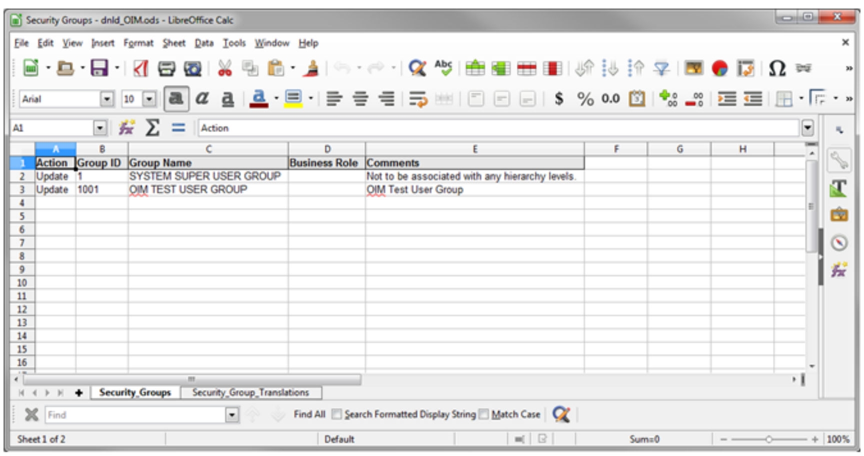

13. Click the **Upload** button.

***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***

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

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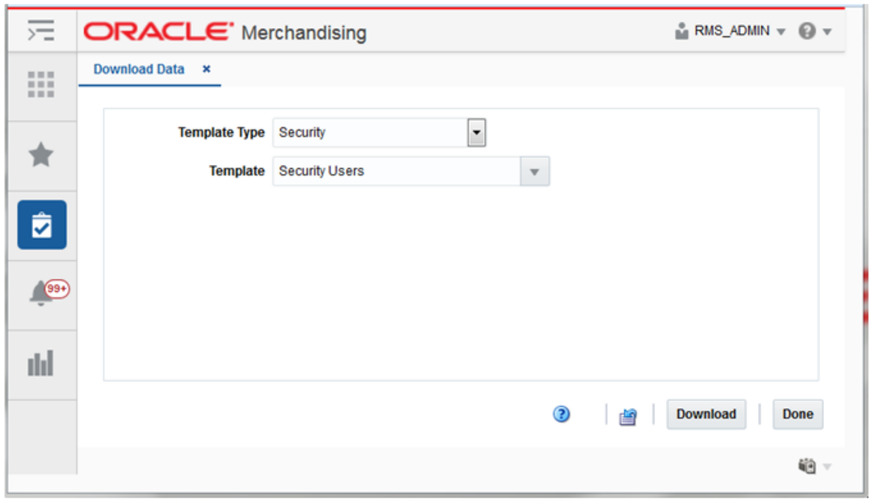
## Setup Security User and Security User Role

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

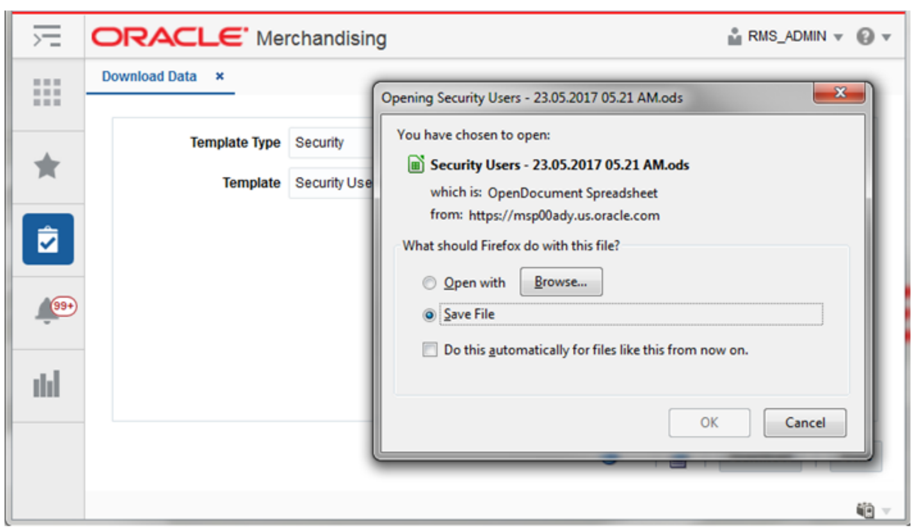
1. Navigate to Foundation Data > Data Loading > Download.
2. In the Download Data screen, select Template Type as 'Security' and Template as 'Security Users'.

*Figure 1–28 Download Security Users template spreadsheet*



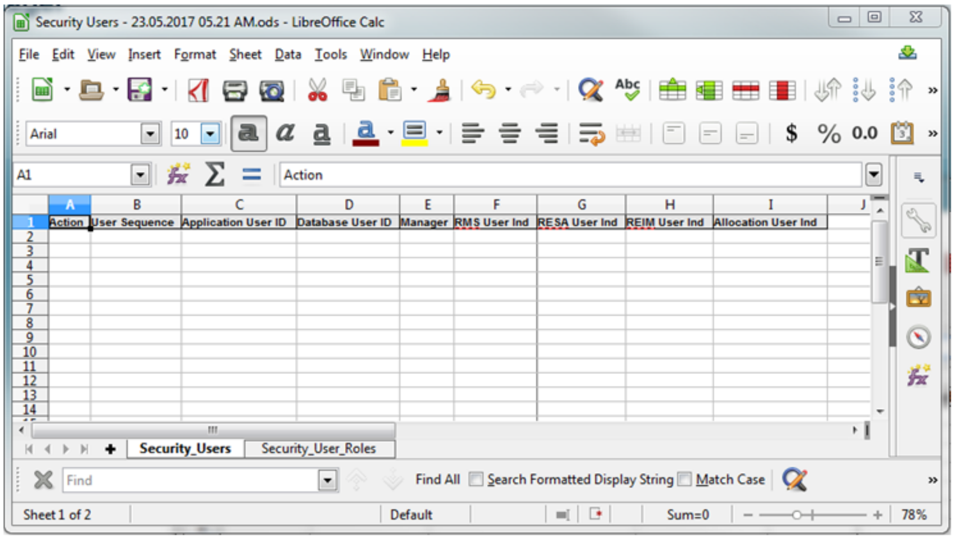

3. Click the **Download** button.
4. Save File to local directory location when prompted.

*Figure 1–29 Save File*



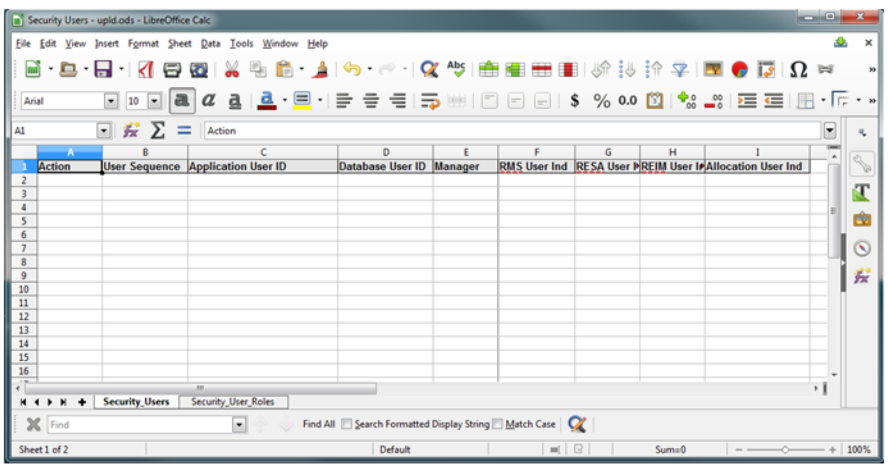

5. Click the **Done** button.
6. Open the downloaded file.

***Figure 1–30 Open File***




**7.** Save As < file name>.

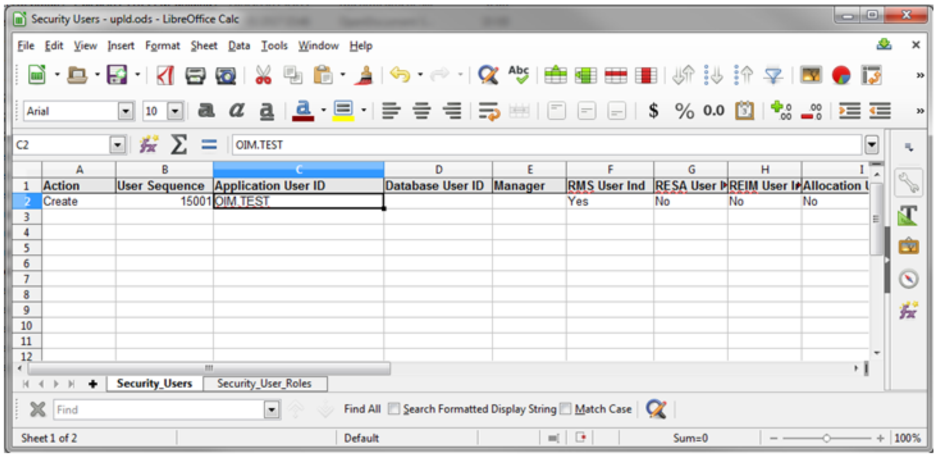
***Figure 1–31 Save as <File Name>***




**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***




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

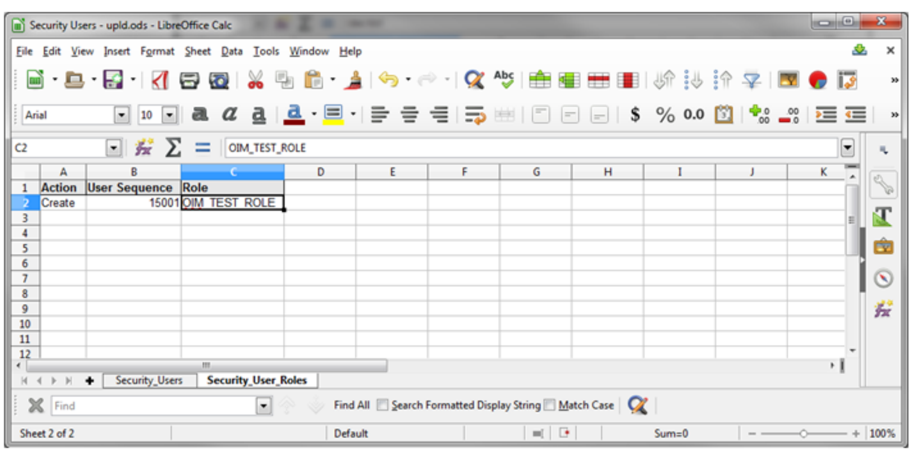
   **Note:** Proceed to set up Security User Role, only if Role Privileges have been setup.

   - Action: 'Create'
   - User Sequence: <number>

   **Note:** This must be the User Sequence provided in the Security_Users tab.

   - Role: <Role>

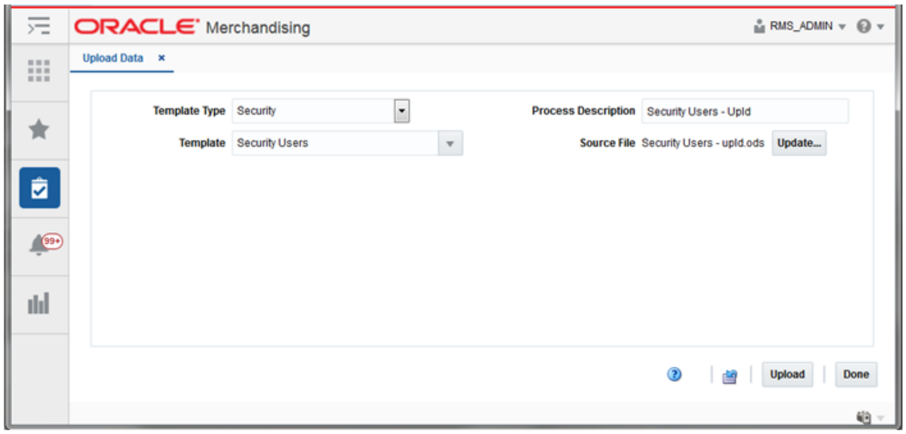
***Figure 1–33   Security User Roles Information***




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'

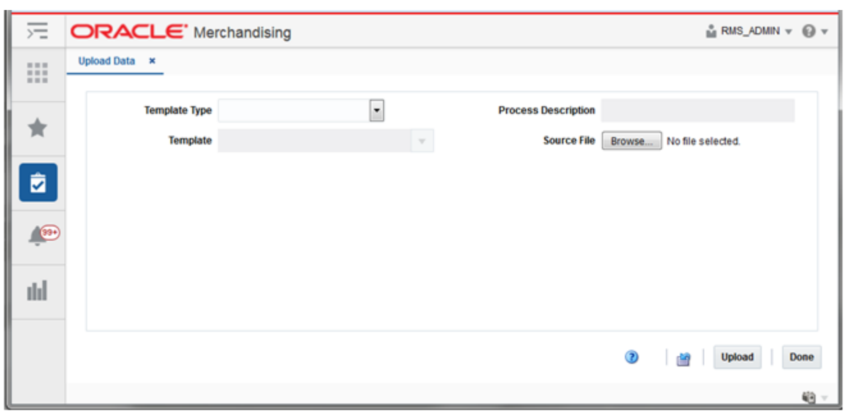
- Template as 'Security Users'
- Enter Process Description or retain as is
- Browse and select the Source file that was created in Step 10

***Figure 1–34 Upload Security Users Information***




13. Click the **Upload** button.

***Figure 1–35 Upload Security Users Information Complete***




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***

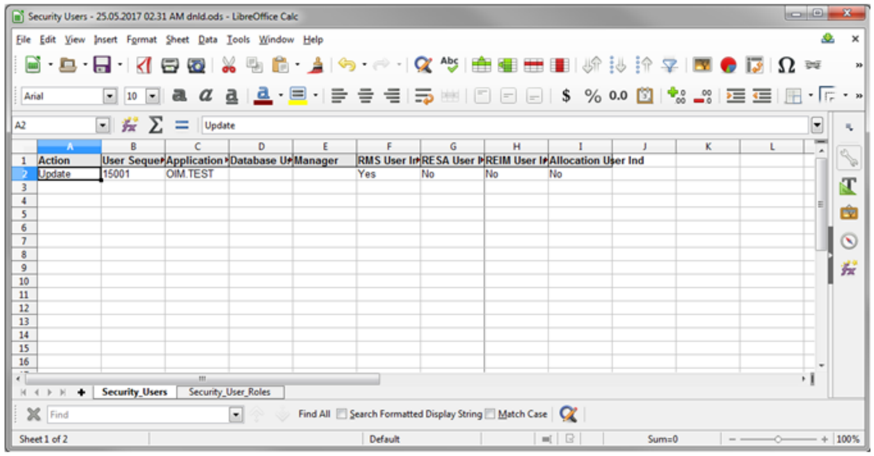
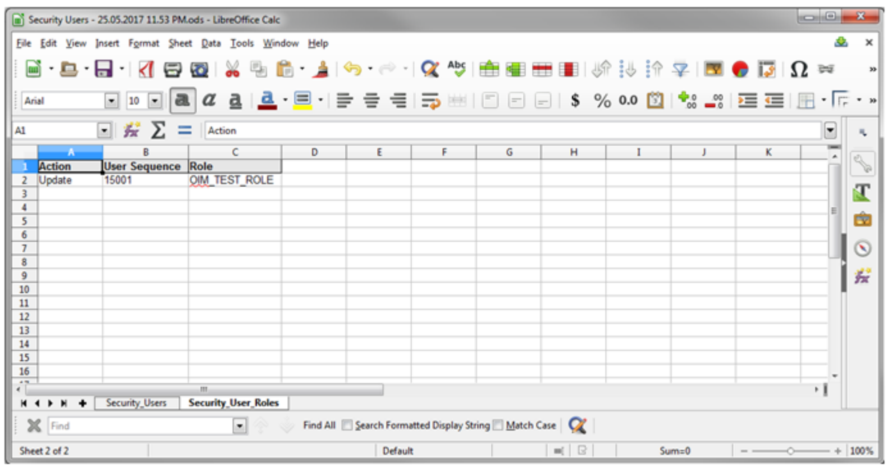


***Figure 1–37 View newly created Security User Role mapping information***



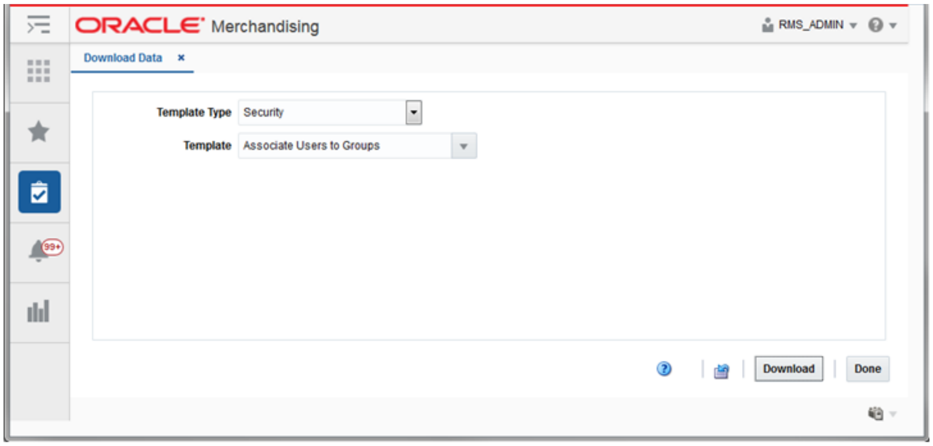
Note the system generated User Sequence. This Security User (User Sequence) will be mapped to the Security Group.

## 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.

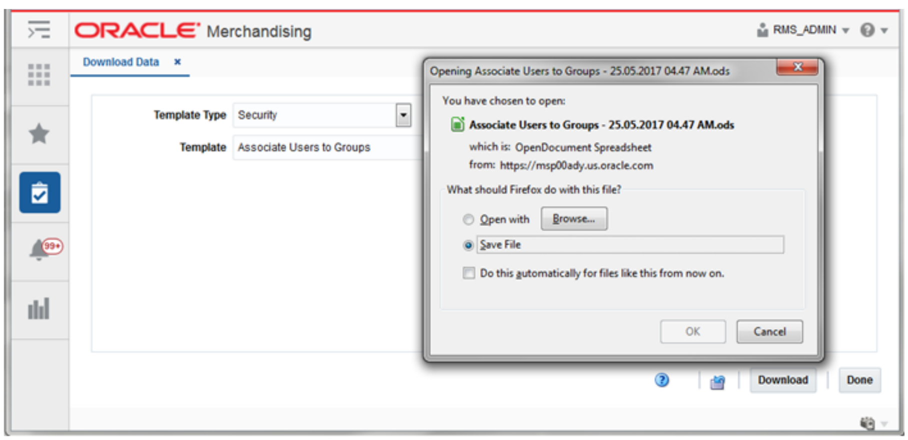
1. Navigate to Foundation Data > Data Loading > Download.
2. In the Download Data screen, select Template Type as 'Security' and Template as 'Associate Users to Groups'.

*Figure 1–38 Download Associate User to Groups Template Spreadsheet*



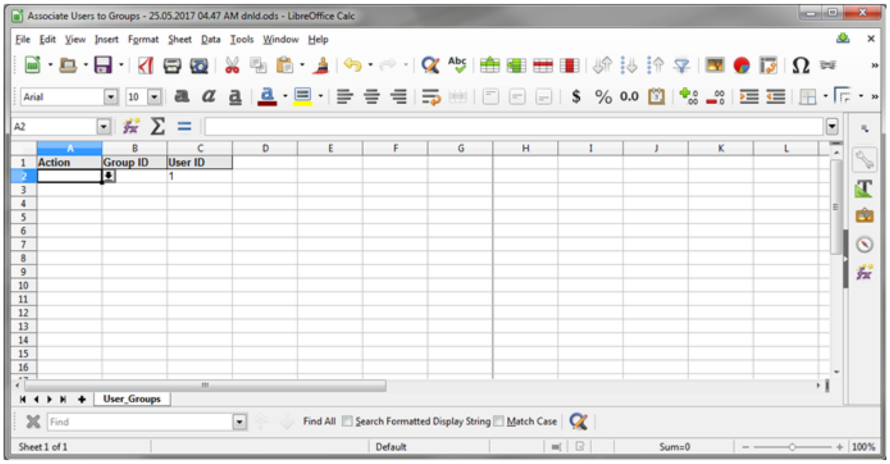

3. Click the **Download** button.
4. Save the file to a local directory location when prompted.

*Figure 1–39 Save File*



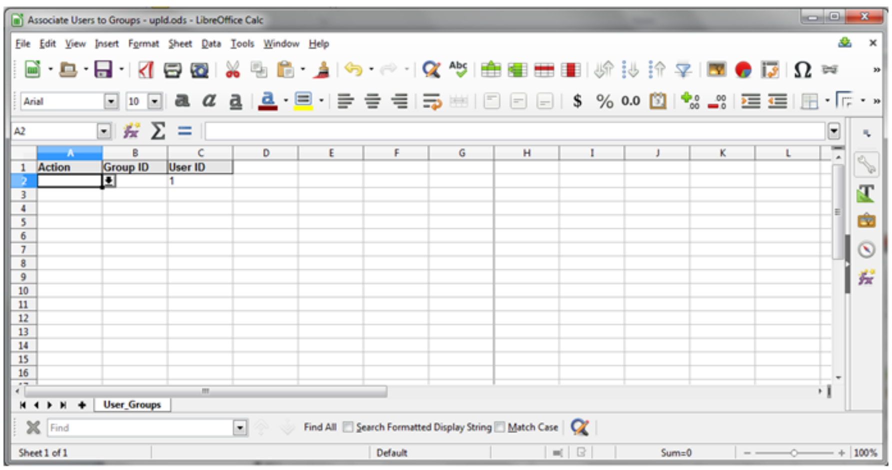

5. Click the **Done** button.
6. Open the downloaded file.

***Figure 1–40 Open File***




**7.** Save As < file name>.

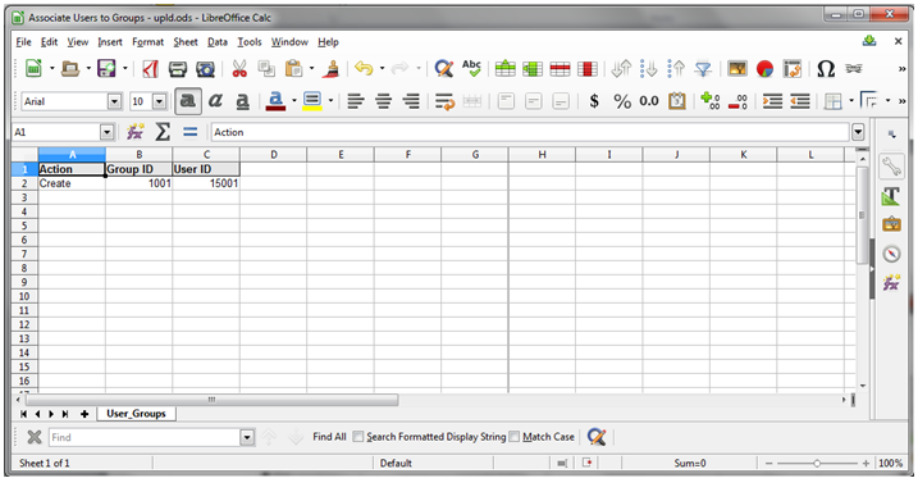
***Figure 1–41 Save as <File Name>***




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

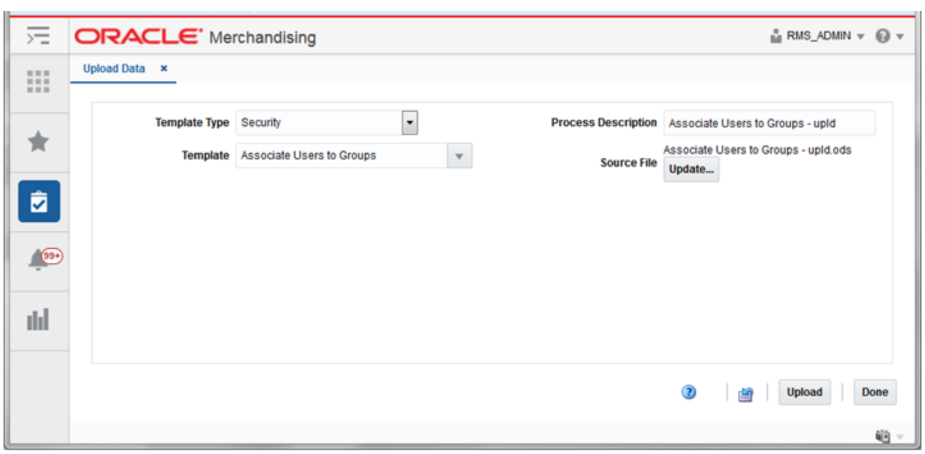
- Action: 'Create'
- Group ID: <Group ID>
- User ID: <User ID>

***Figure 1–42 Enter User Groups information***



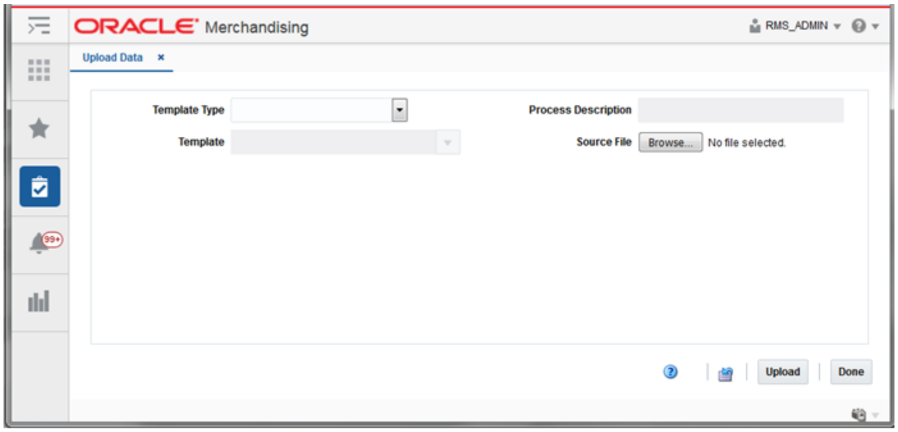

9. Save and Close the file.
10. In the RMS Application, navigate to Foundation Data > Data Loading > Upload.
11. In the Upload Data screen, select:
    - Template Type as 'Security'
    - Template as 'Associate Users to Groups'
    - Enter new Process Description or retain as is
    - Browse and select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

***Figure 1–43 Upload User Groups Information***




12. Click the **Upload** button.

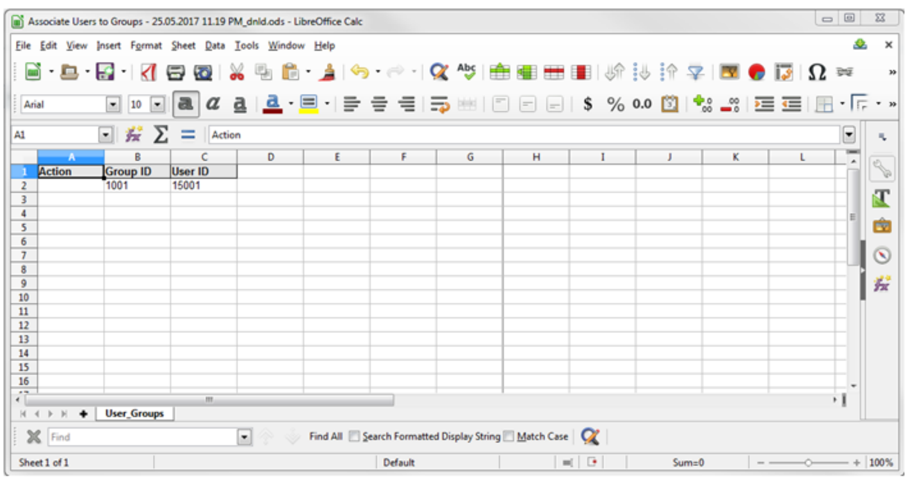
*Figure 1–44 Upload User Groups Information Complete*




13. Click the **Done** button.

14. View the newly created User Groups mapping by downloading the User Groups spreadsheet (Steps 1 - 6).

*Figure 1–45 View Newly Created User Group Association*



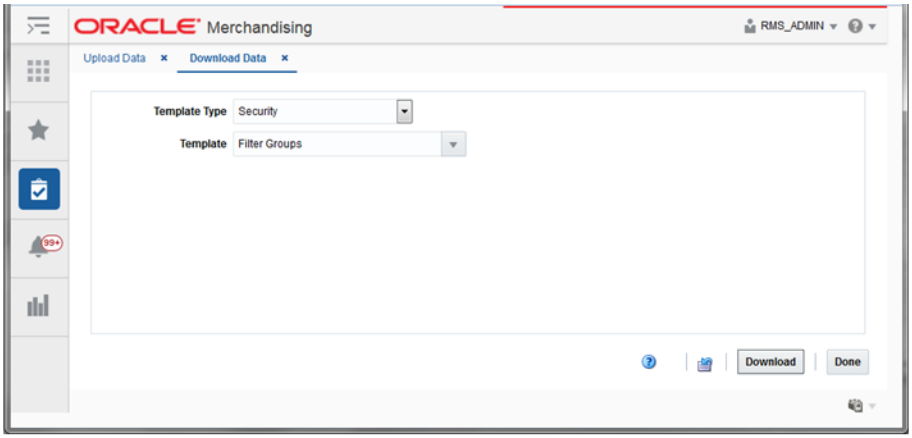

## Setup Merchandise Hierarchy LOV Filtering Access Information

The security group can only access the merchandise hierarchies and organization hierarchies assigned to the user through Filter Groups. If a security group is not assigned to any Filter Group then the users in the group are considered 'super users' and will have access to all merchandise hierarchies or all organization hierarchies respectively.

1. Navigate to Foundation Data > Data Loading > Download.

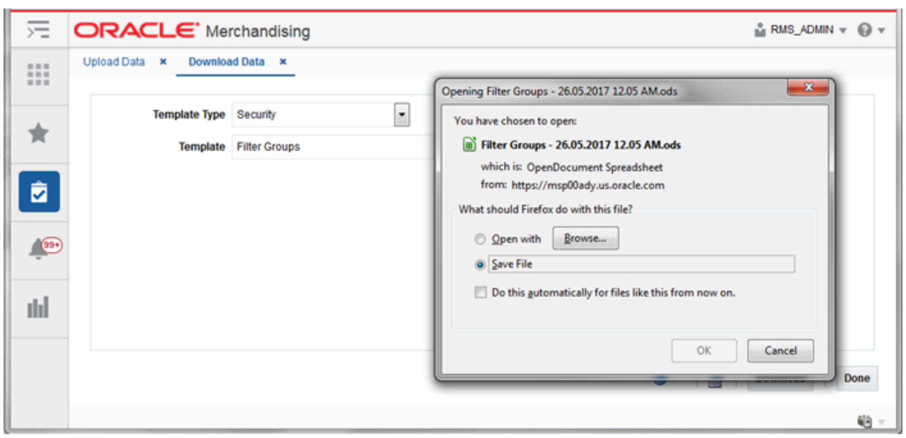
2. In the Download Data screen, select Template Type as 'Security' and Template as 'Associate Users to Groups'.

*Figure 1–46 Download Filter Groups Template Spreadsheet*



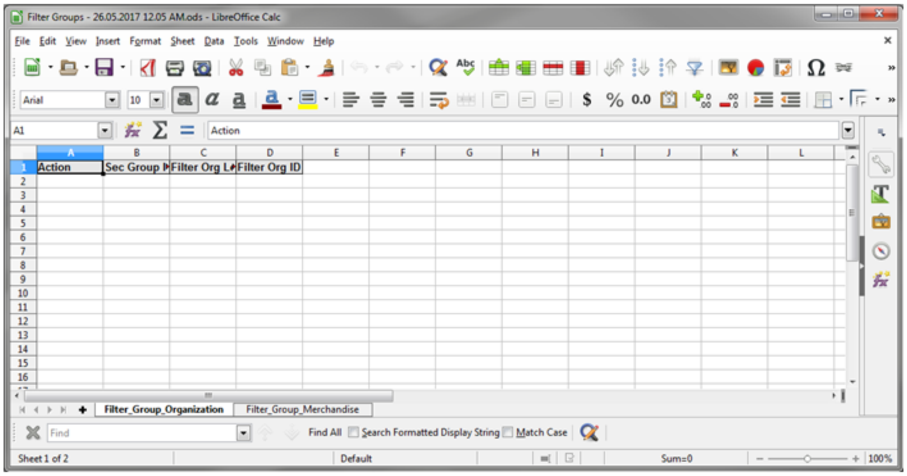

3. Click the **Download** button.
4. Save File to local directory location when prompted.

*Figure 1–47 Save File*



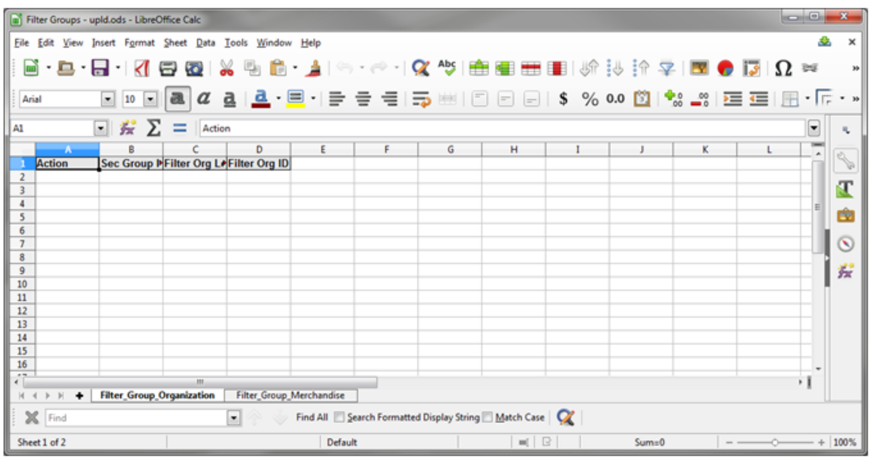

5. Click the **Done** button.
6. Open the downloaded file.

***Figure 1–48 Open File***



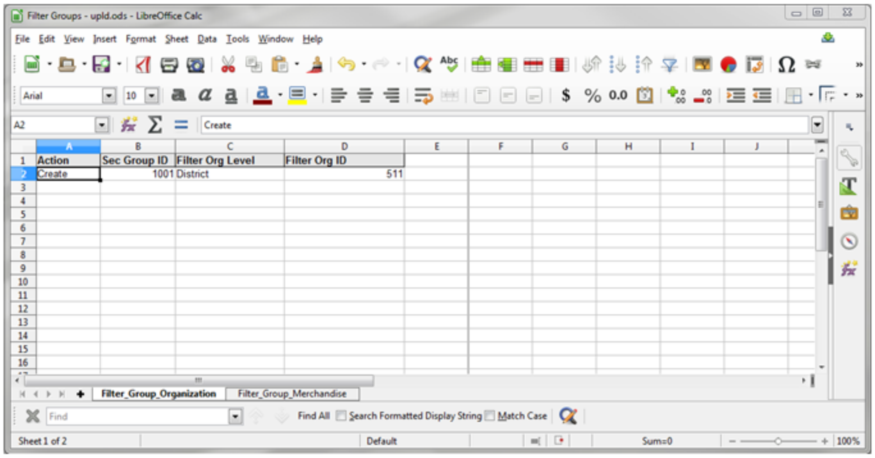

7. Save As < file name>.

***Figure 1–49 Save as <File Name>***



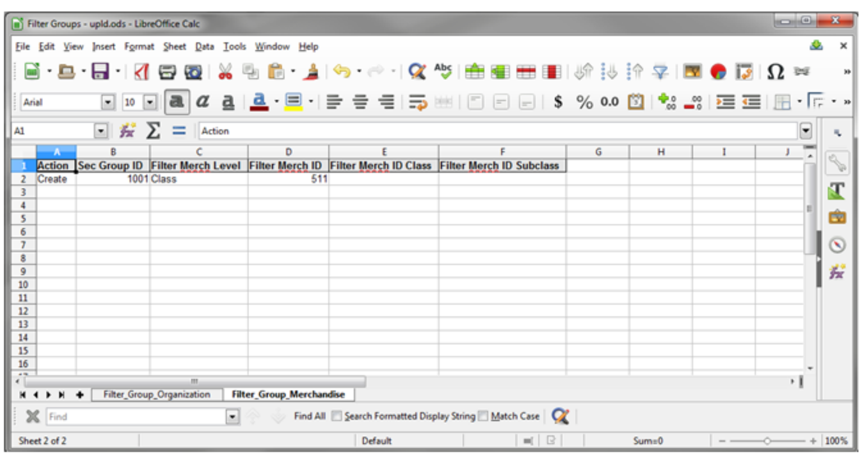

8. In the Filter_Group_Organization tab, enter/select the following:
   - Action: 'Create'
   - Sec Group ID: <User Security group ID>
   - Filter Org Level: <Organization hierarchy level>
   - Filter Org ID: <ID of the Organization hierarchy level>

***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)

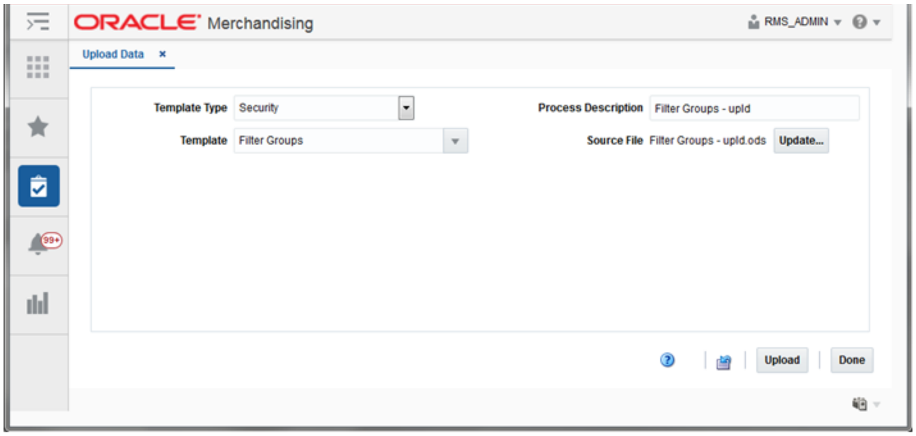
***Figure 1–51 Enter Filter Group Merchandise information***




10. Save and close the file.
11. In the RMS Application, navigate to Foundation Data > Data Loading > Upload.
12. In the Upload Data screen, select:
    - Template Type as 'Security'
    - Template as 'Filter Groups'

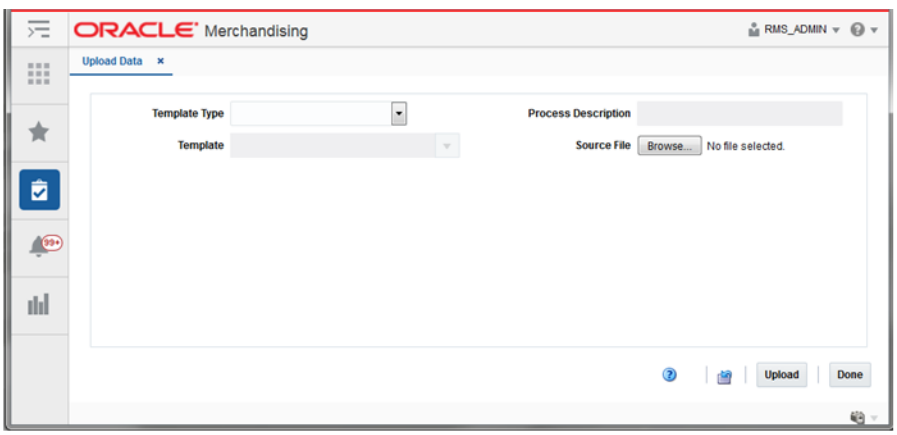
- Enter new Process Description or retain as is
- Browse and select the Source file that was created in Step 10

***Figure 1–52 Upload Filter Groups Information***




13. Click the **Upload** button.

***Figure 1–53 Upload Filter Groups Information Complete***




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

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

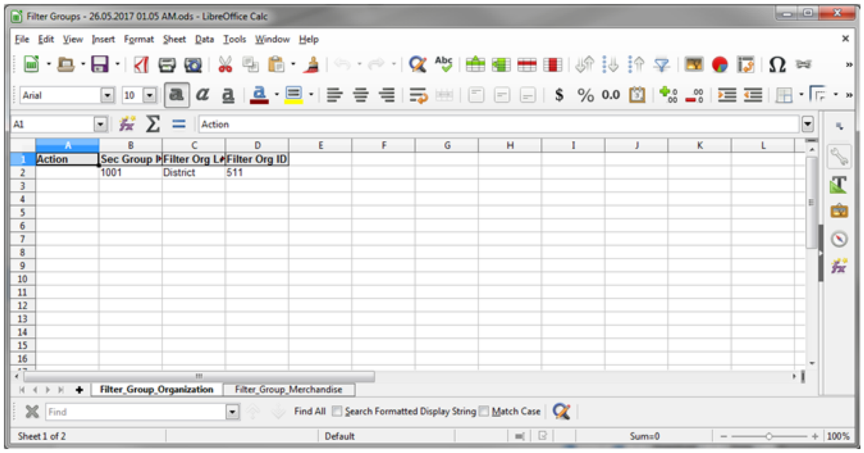
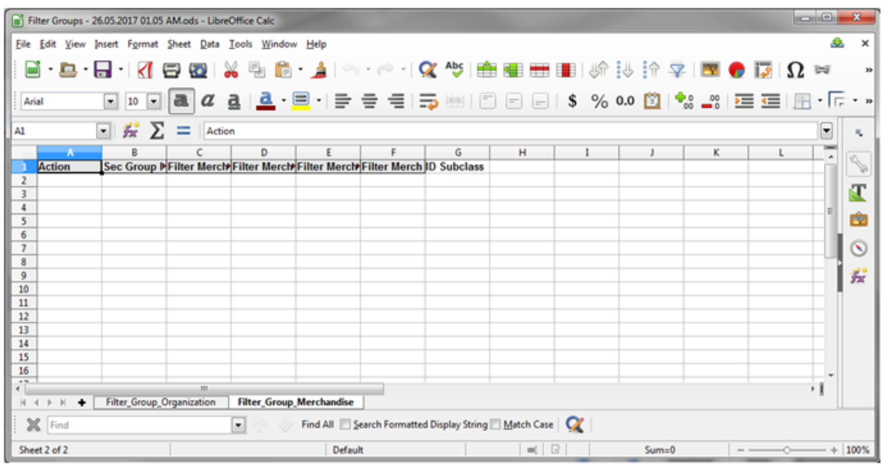



***Figure 1–55 Newly Created Filter Groups***




## 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 |
| Merchandising | Data Steward | RMS Data Steward |
| Merchandising | Buyer | Buyer |
| Merchandising | Inventory Analyst | Inventory Analyst |
| Merchandising | Inventory Manager | Inventory Manager |
| Merchandising | Corporate Inventory Control Analyst | Corporate Inventory Control Analyst |

*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 |
| Invoice Matching | Data Steward | Data Steward |
| Allocation | Application Administrator | Allocation Application Administrator |
| Allocation | Allocation Manager | Allocation Manager |
| Allocation | Allocator | Allocator |
| Allocation | Buyer | Buyer |

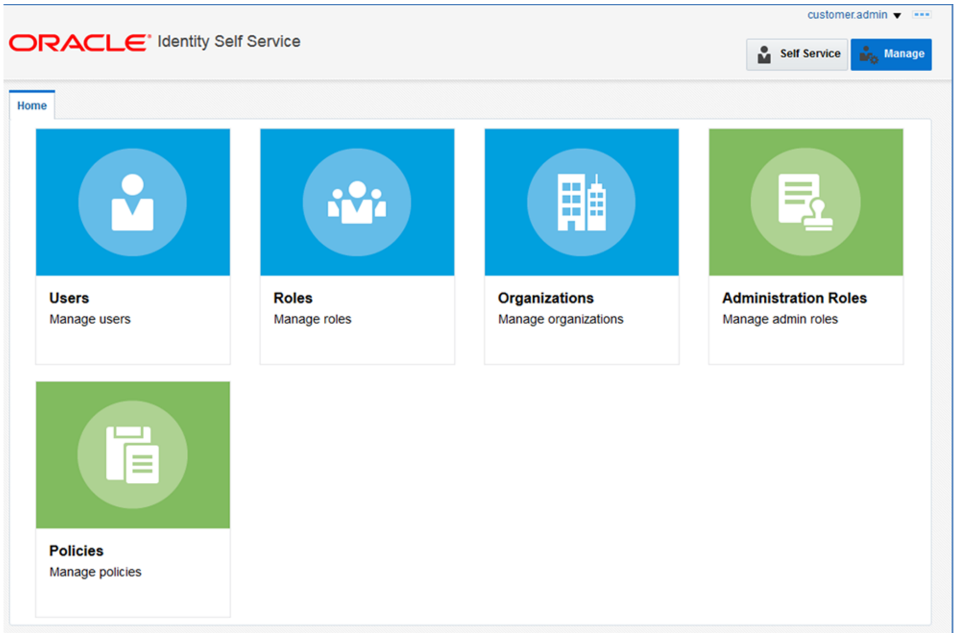
**Note:** A new DATAPRIV_ADMINISTRATOR_REST_API_ROLE and DATA_PRIVACY_ADMINISTRATOR_JOB was created which are not associated to application users. These should be assigned to the users that invoke ReST services.

## Revoking Role Membership

To revoke the membership of a member in a role:

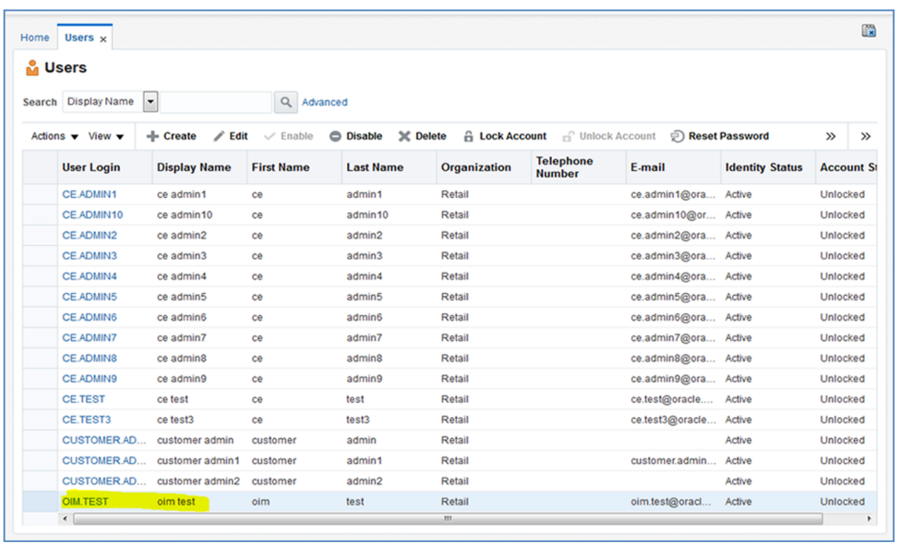
1. Log into the OIM application.
2. Click **Users**.

***Figure 1–56 Select Users***




3. Click the oim.test user.

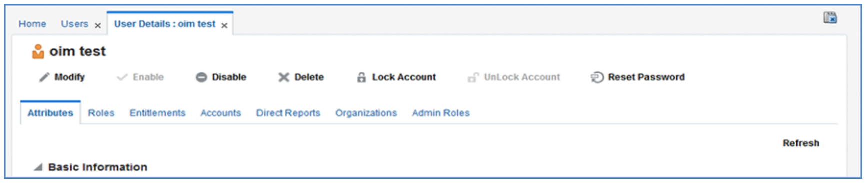
***Figure 1–57 Select Role to Revoke Users***




| User Login | Display Name | First Name | Last Name | Organization | Telephone Number | E-mail | Identity Status | Account St |
|---|---|---|---|---|---|---|---|---|
| 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@oracl... | Active | Unlocked |

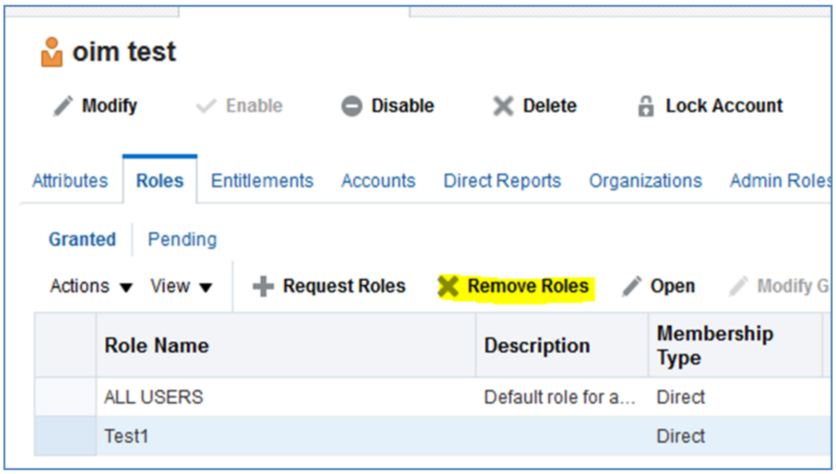
4. Click the Roles tab.

***Figure 1–58 Roles Tab***



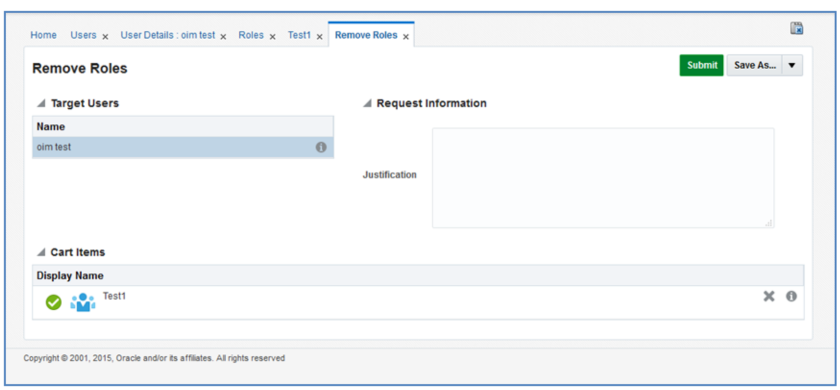

5. Select the Role you want to revoke and click the **Remove Role** button.

***Figure 1–59 Remove Roles Button***




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

***Figure 1–60 Remove Roles Screen***

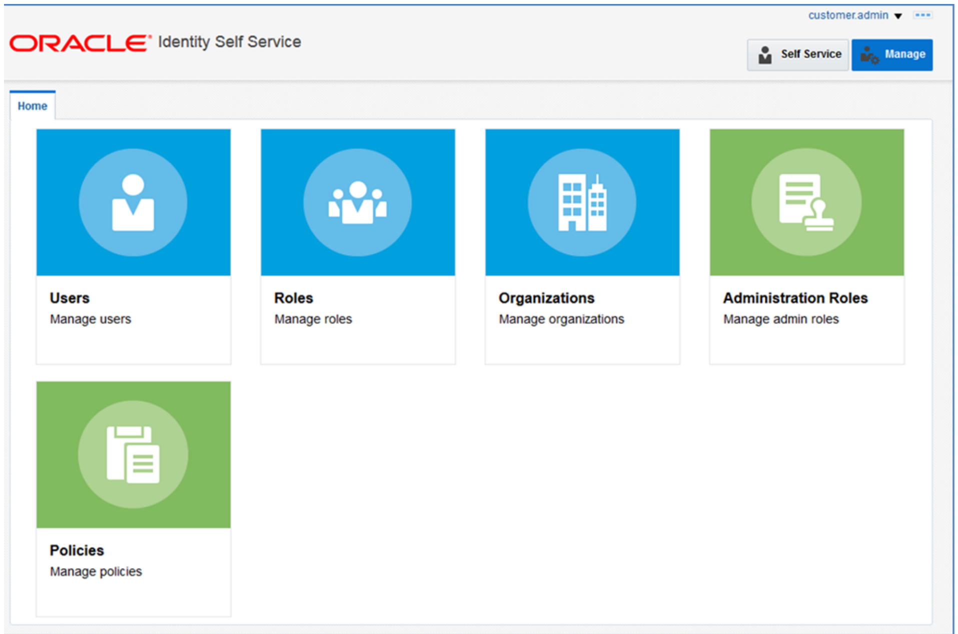



## Deleting a User or Disabling User Privileges

To delete or disable a user

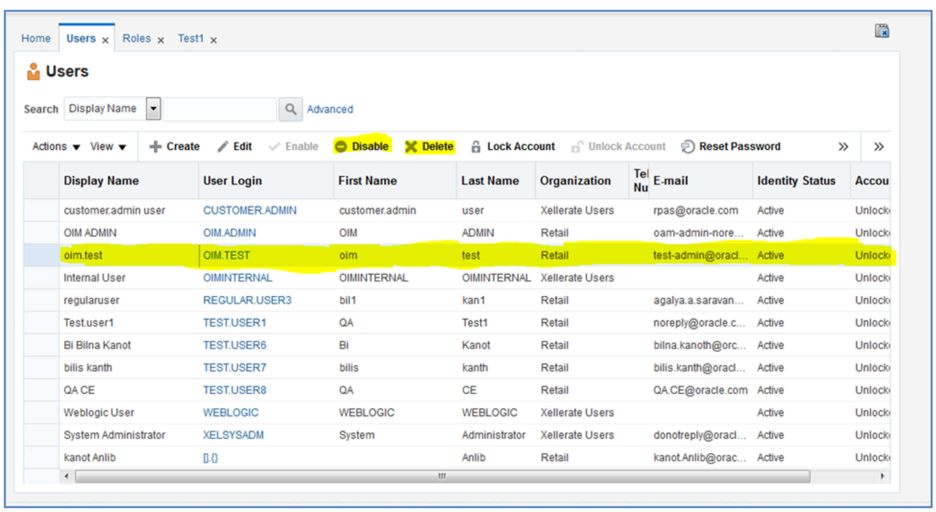
1. Log into the OIM application.
2. Under Administration, click **Users**.

***Figure 1–61 Select Users***




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

***Figure 1–62 Delete and Disable***



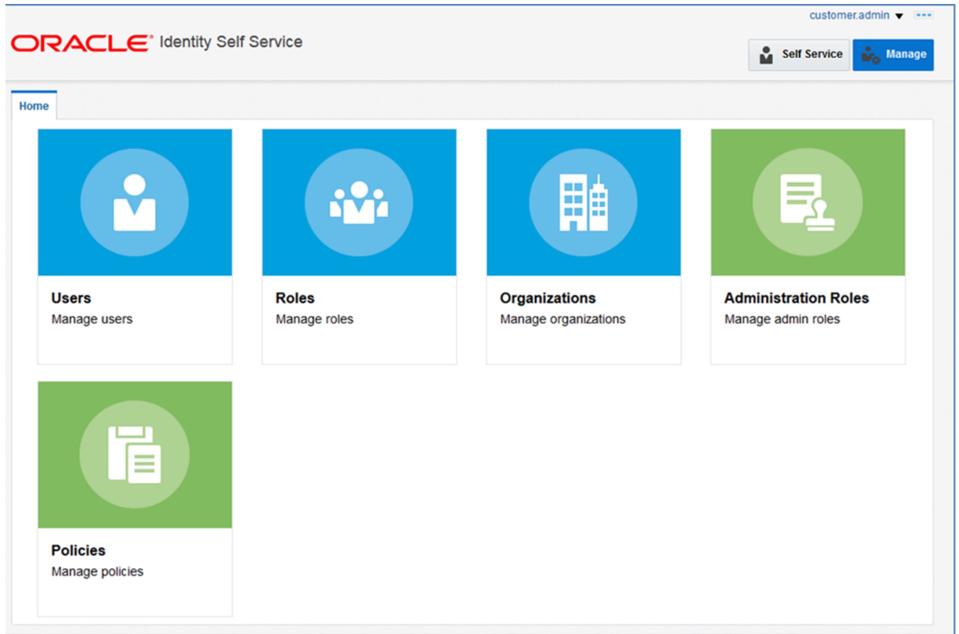

4. You can also Lock or Unlock a particular user from the same screen if needed.

## Resetting a User Password

To reset the password of a user:

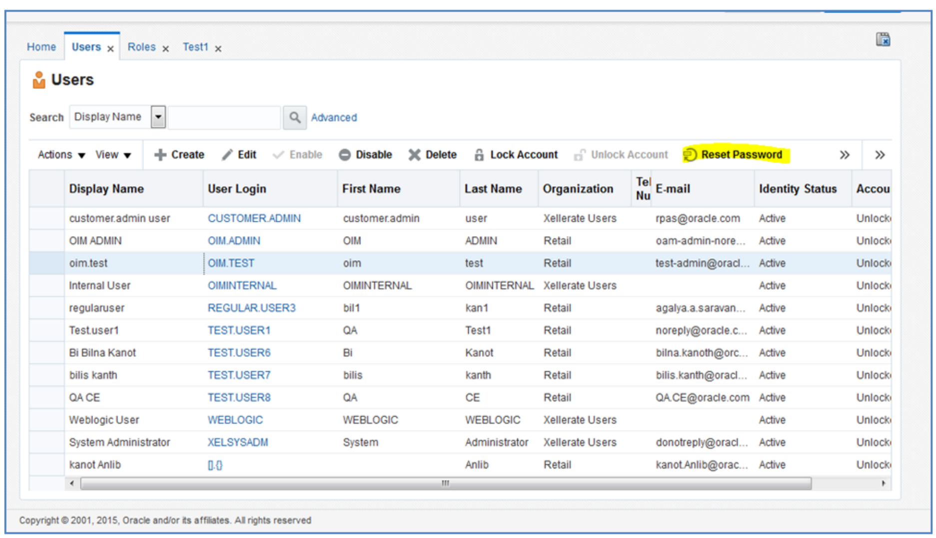
1. Log into the OIM application.
2. Under Administration, click **Users**.

**Figure 1–63 Select Users**



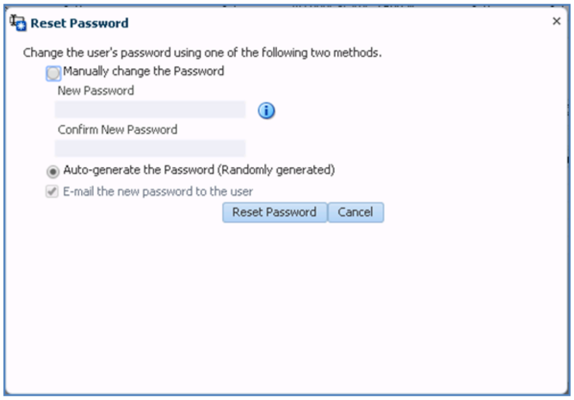

3. Click the **Search** tab and then select on the User you want to reset the password.
4. Click **Reset Password**.

**Figure 1–64 Reset Password Button**




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 1–65 Reset Password*

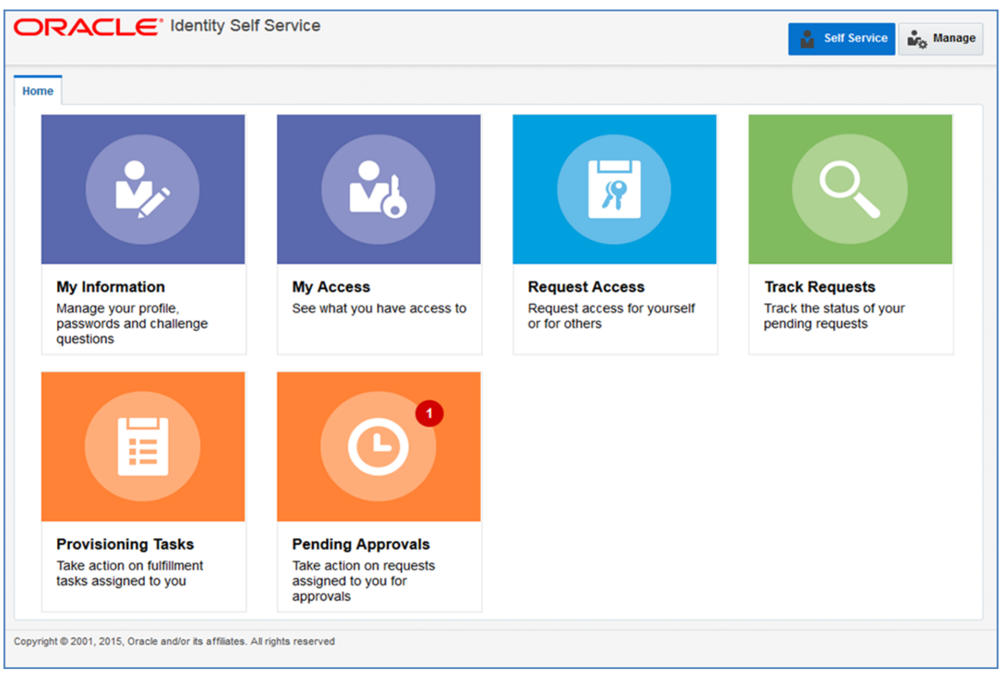



## Approve Requests from User

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.

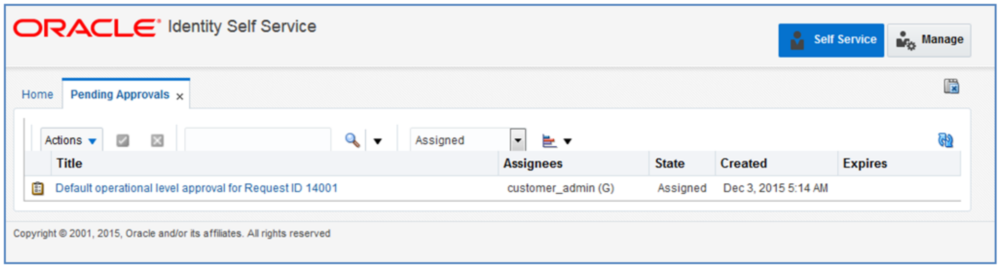
1. Login into OIM Application.
2. Click **Pending Approvals**.

*Figure 1–66 Select Pending Approvals*



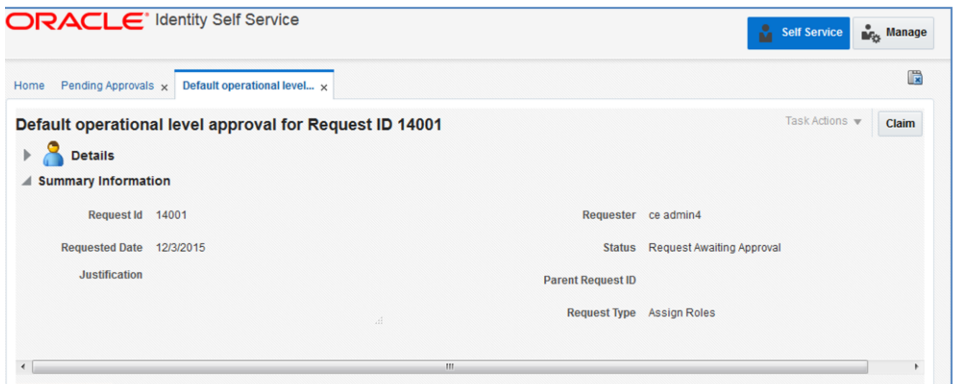

3. Click on the Action that is assigned to you.

***Figure 1–67 Pending Approvals Tab***



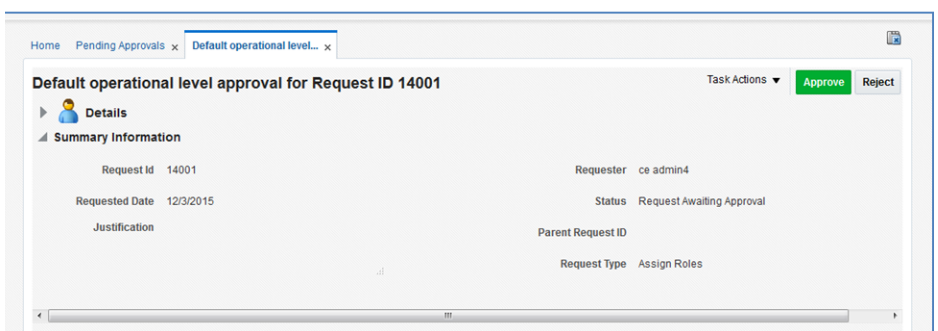

4. Click the **Claim** button.

***Figure 1–68 Claim the Pending Approval***




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

***Figure 1–69 Approve Pending Approval***



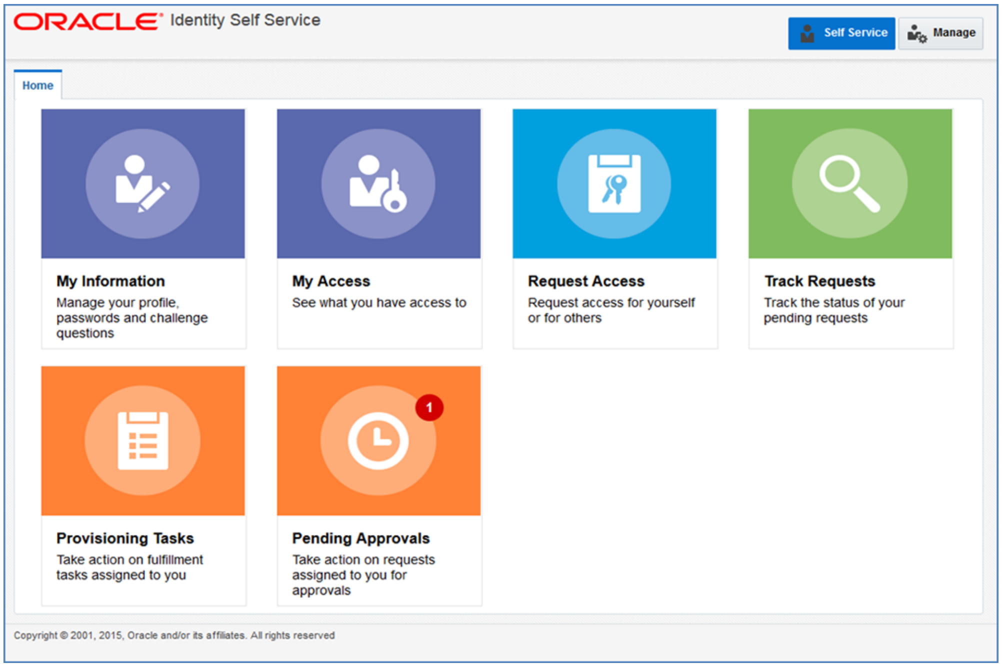

6. The request is complete.

## 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.

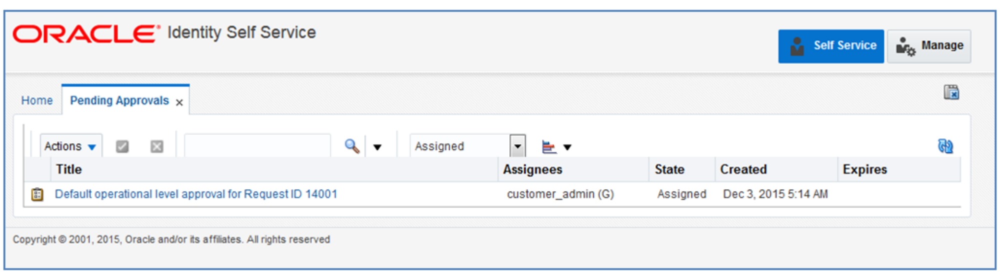
1. Login into OIM Application.
2. Click **Pending Approvals**.

***Figure 1–70 Select Pending Approvals***



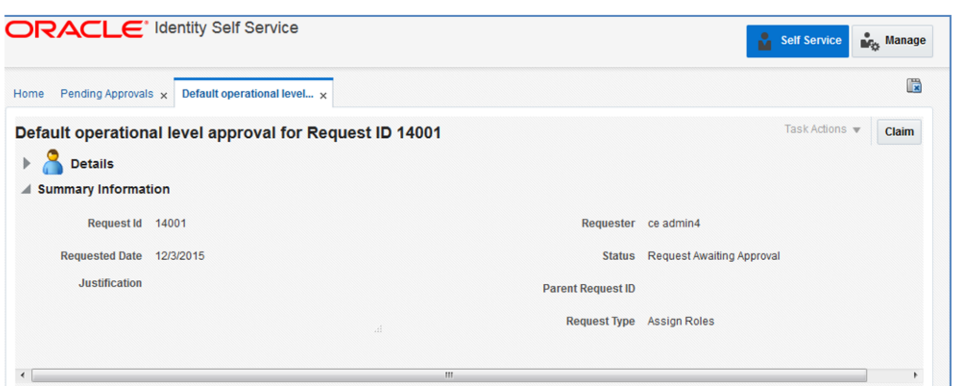

3. Click on the Action that is assigned to you.

***Figure 1–71 Pending Approvals Tab***



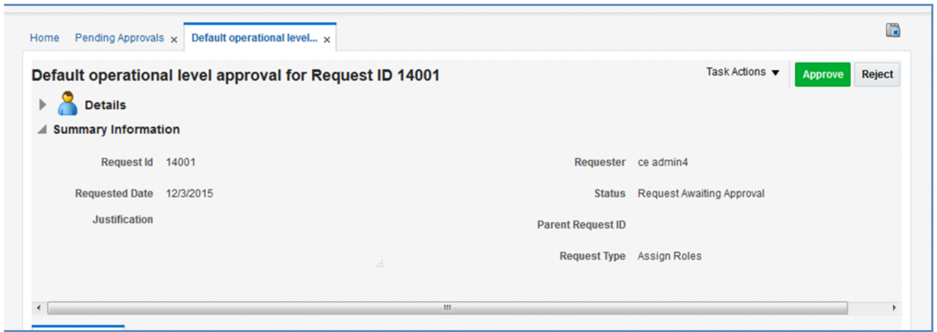

4. Click the **Claim** button.

***Figure 1–72 Claim the Pending Approval***



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

***Figure 1–73 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

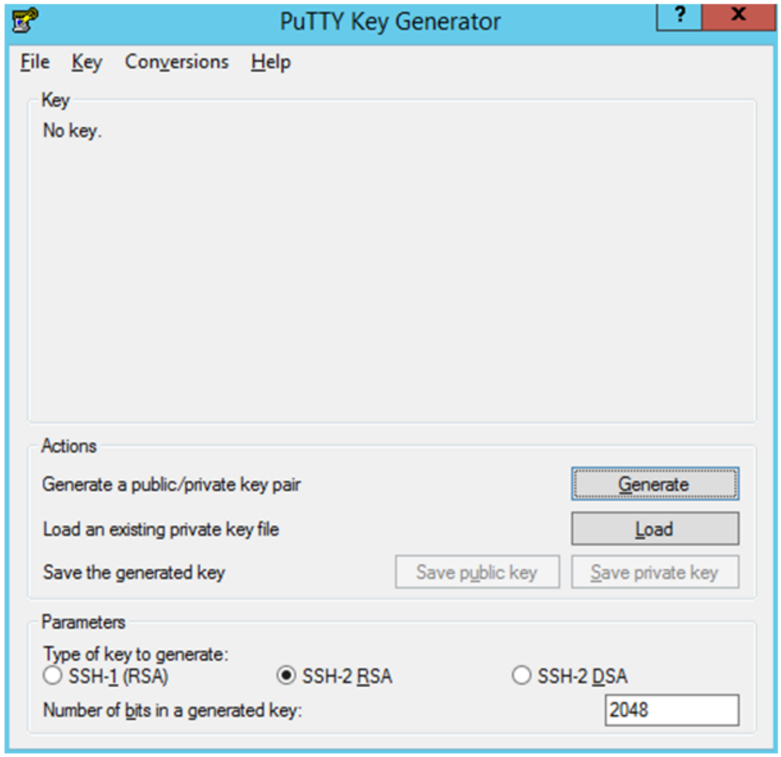
The following is the file upload process. The Private/Public Keys must be generated and the public Key must be associated with your SFTP Account for the file uploads. The Adding Authorized Keys section describes the step-by-step method to generate the Keys (2048 bit RSA Keys).

## 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.

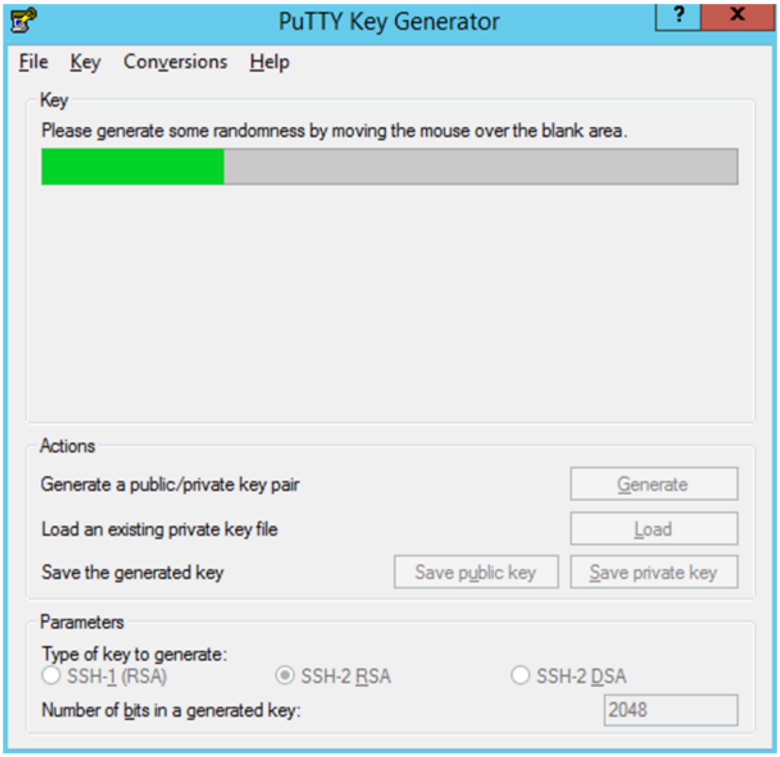
1. Launch WinSCP and select Tools -> Run PuttyGen.
2. Select *SSH-2 RSA* for the type of key to generate and enter *2048* for the number of bits in a generated key field and click **Generate**.

***Figure 1–74 Key Generator***




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

***Figure 1–75 Key Generator Progress***



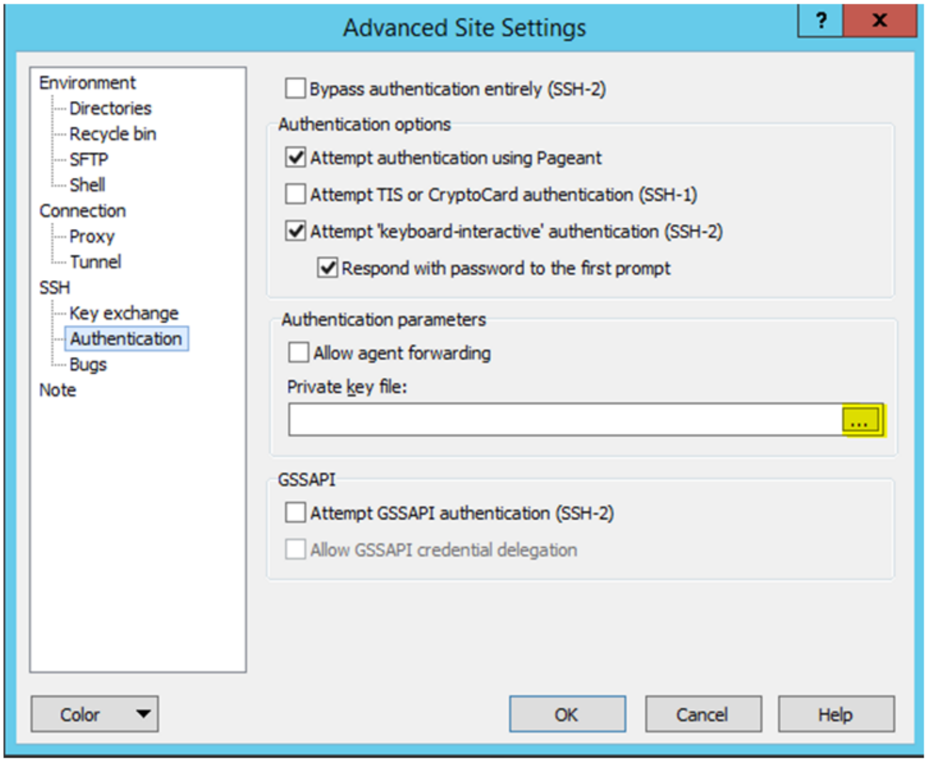

4. Once the key is generated, click **Save public key** to save the public key to a file.
5. Click **Save private key** to save the Private key to a file. Confirm to save it with or without a passphrase.
6. Open an SR with Oracle Support, to associate the Public half of the Key with your SFTP account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

## Steps – Login to WinSCP

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

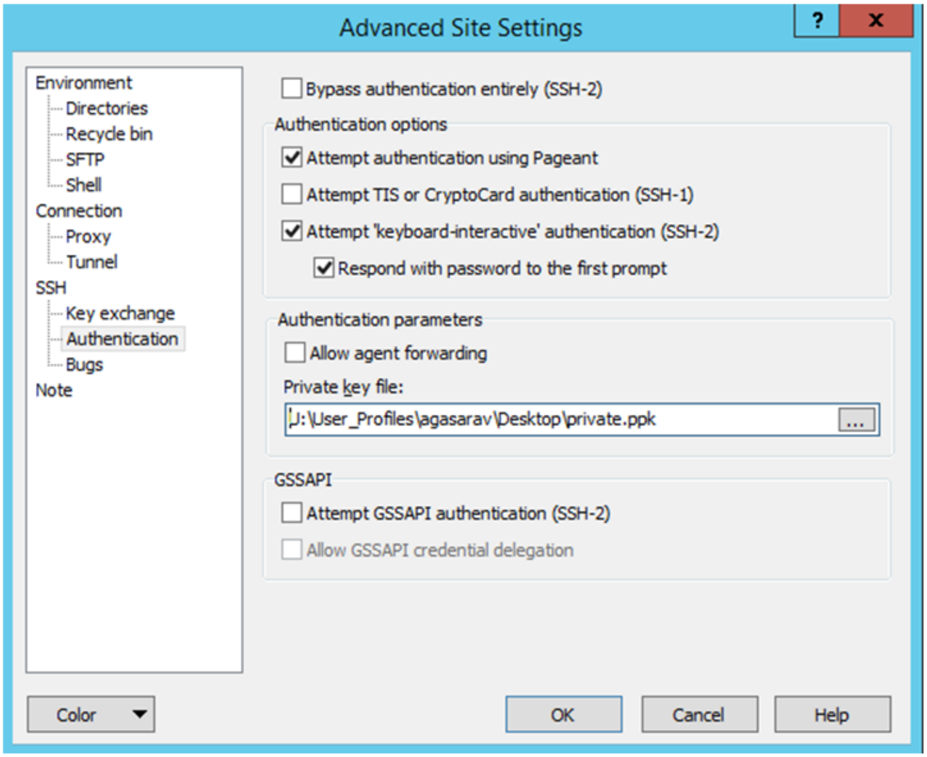
1. Launch WinSCP and connect to <SFTP Server> using port 22.
2. Enter the username and then click **Advanced**.
3. Click **Authentication**.
4. In the Private Key File field, click **Browse** and select the private key created in the section, Adding Authorized Keys.

***Figure 1–76 Advanced Site Settings Dialog***




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

***Figure 1–77 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.

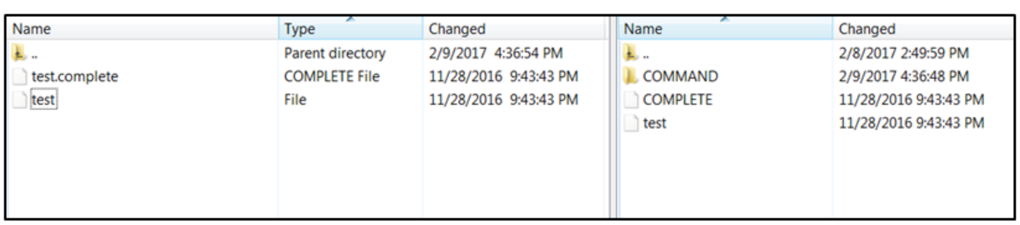
> **Note:** Login can only be performed using the authorized keys. Login with username / password is not supported.

## Steps to Upload the Batch File

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

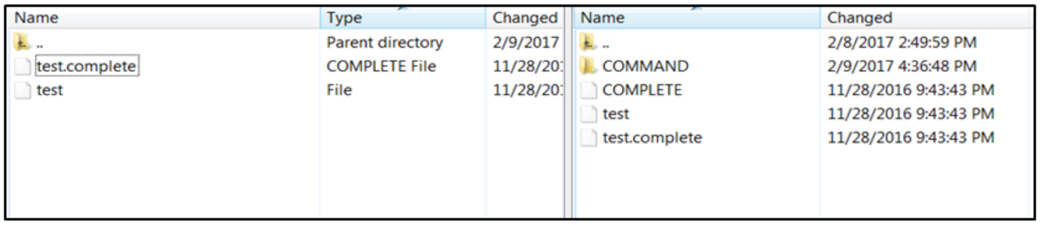
1. Transfer the file to be copied (e.g., test) to /<SFTP User>.

***Figure 1–78 <SFTP User> Directory***



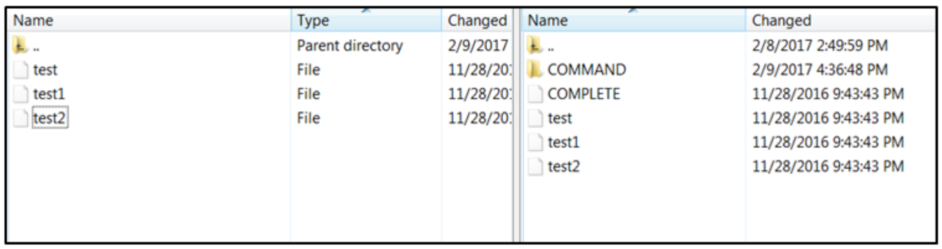

2. Transfer an empty file <filename>.complete (eg: test.complete) to the directory /<SFTP User>.

***Figure 1–79 Transferring Empty File***



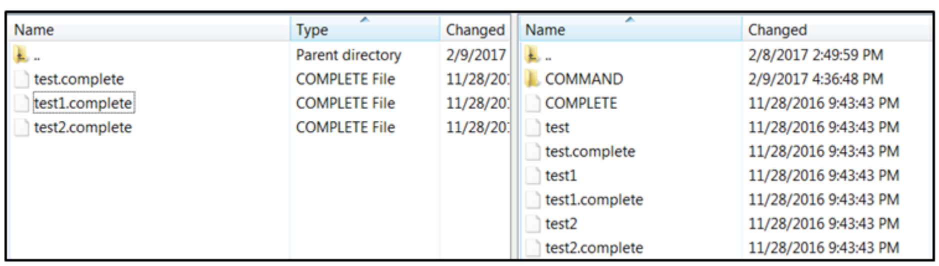

3. If multiple files have to be transferred, copy all the files to /<SFTP_user>.

***Figure 1–80 Transferring Multiple Files***




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

***Figure 1–81 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.