

Oracle® Retail Merchandising Suite

Administration Guide

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Oracle Retail Merchandising Suite Administration Guide, Release 19.0

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
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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>

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the

same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

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

Oracle Retail Documentation on the Oracle Help Center (docs.oracle.com)

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

<https://docs.oracle.com/en/industries/retail/index.html>

(Data Model documents can be obtained through My Oracle Support.)

Conventions

The following text conventions are used in this document:

| Convention | Meaning |
|-------------------|--|
| boldface | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary. |
| <i>italic</i> | Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values. |
| monospace | Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter. |

This document provides a guide to the key tasks of the application administrator of the Merchandising suite of solutions. This includes an overview of configuring SFTP for file transfers, creating users and assigning them to roles, duties, and privileges, and configuring other features in the solutions.

Logging Service Requests (SRs)

If you have issues that cannot be resolved by consulting this or other Merchandising suite documentation, an SR should be logged with the question. This will allow the requests to be managed through a single point of contact for your environment. This includes activities where you require support from the Oracle Cloud Operations team to complete tasks. The link to use when submitting Service Requests (SR) is:

<https://support.oracle.com>

Configure SFTP for File Transfers

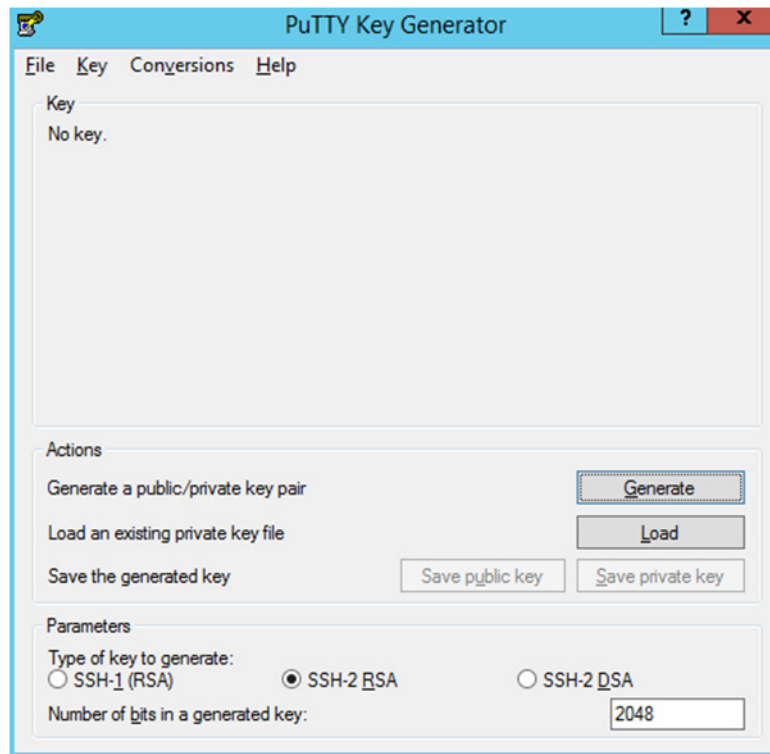
Some of the Merchandising suite integrations involve flat files as inputs or outputs of the process. In order to support uploading files in a SaaS implementation, you must generate private and public keys and the public key must be associated with your SFTP account for the file uploads. A unique public key must be created for each of your environments (e.g. production, stage, and so on).

Adding Authorized Keys

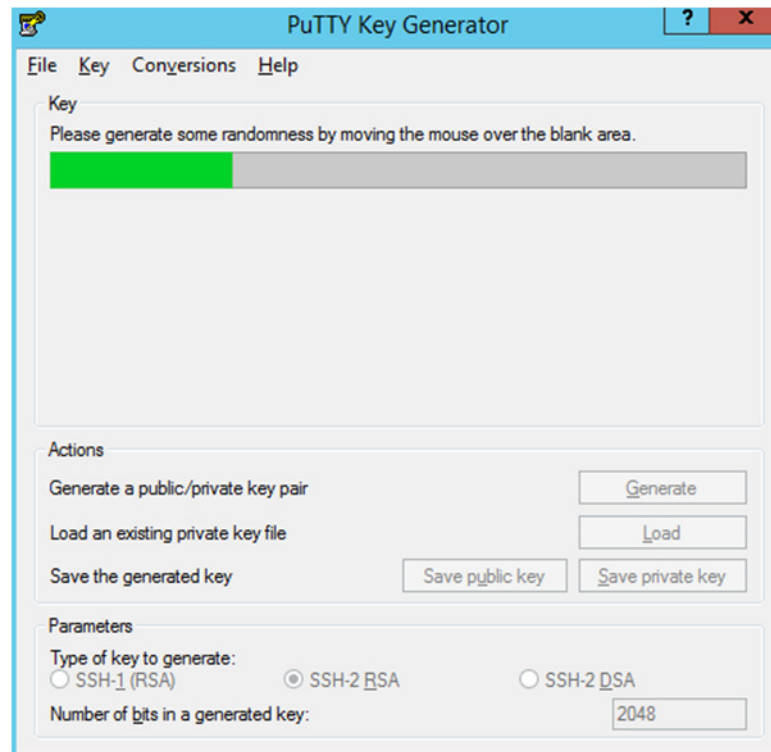
The following is the process to generate a 2048 bit RSA key and add the same to the SFTP server. This is done with the help of WinSCP tool on Windows. However the same can be done using ssh-keygen on Linux as well.

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 2–1 Key Generator



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

Figure 2–2 Key Generator Progress

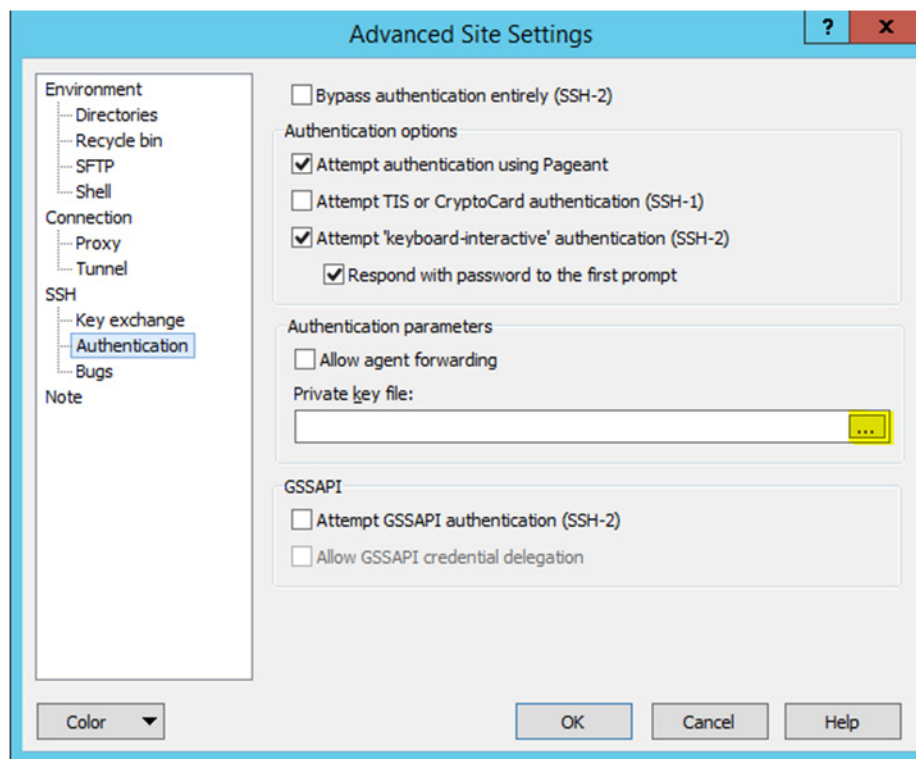
4. Once the key is generated, click the **Save public key** button to save the public key to a file.
5. Click the **Save private key** button to save the Private key to a file. Confirm to save it with/without a passphrase.
6. Open an SR with Oracle Support, to associate the Public half of the Key with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

Uploading Batch Files

The Upload steps use the private key generated in the earlier section.

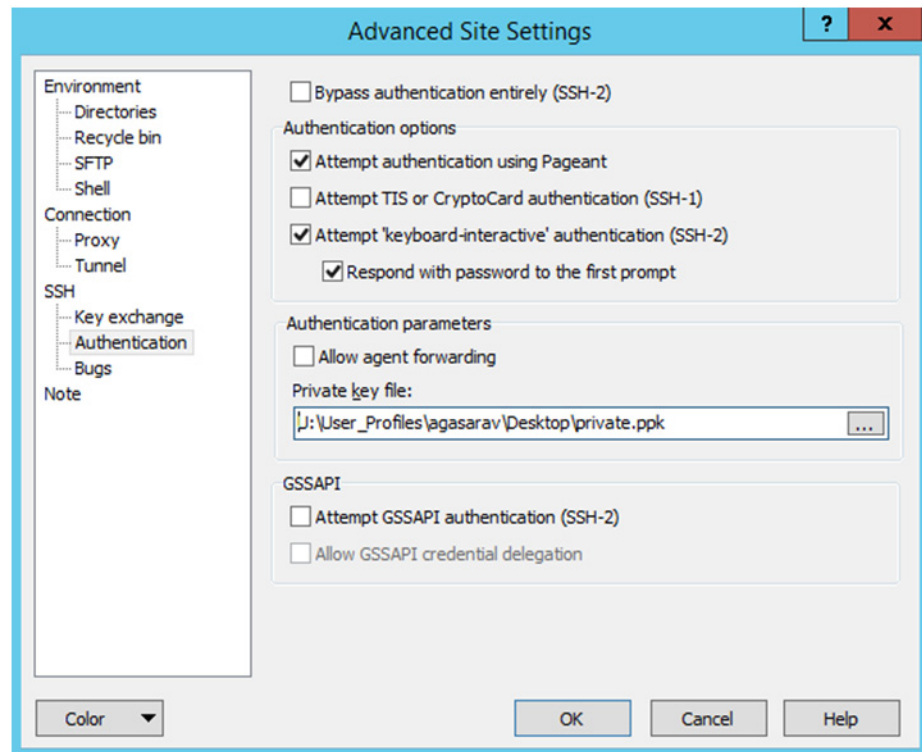
1. Launch WinSCP and connect to <SFTP Server> using port 22.
2. Enter the username and click **Advanced**.
3. Click **Authentication**.
4. In the Private Key File field, click the **Browse** button and select the private key created in the earlier section.

Figure 2-3 Advanced Site Settings Dialog



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

Figure 2-4 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.
7. Transfer all data files to the directory /<SFTP User>.
8. For each data file transferred to /<SFTP User>, transfer a corresponding file <filename>.complete

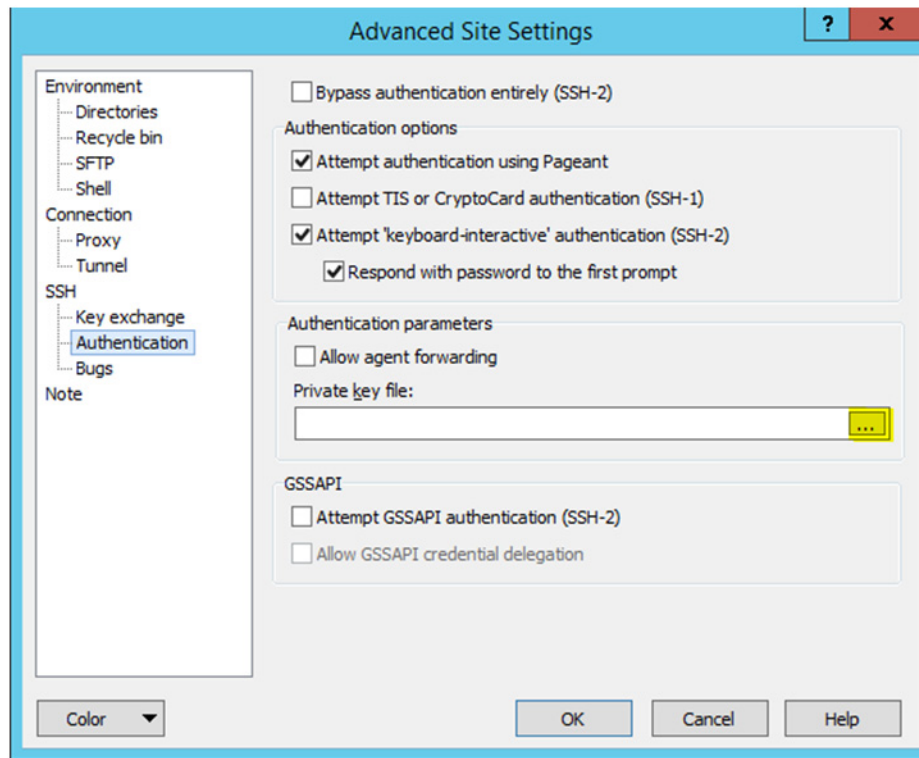
For example, if data_file1.dat, data_file2.dat, data_file3.dmp are the files to transfer, then transfer the below files to the /<SFTP User>/ directory.

```
data_file1.dat.complete
data_file2.dat.complete
data_file3.dmp.complete
```

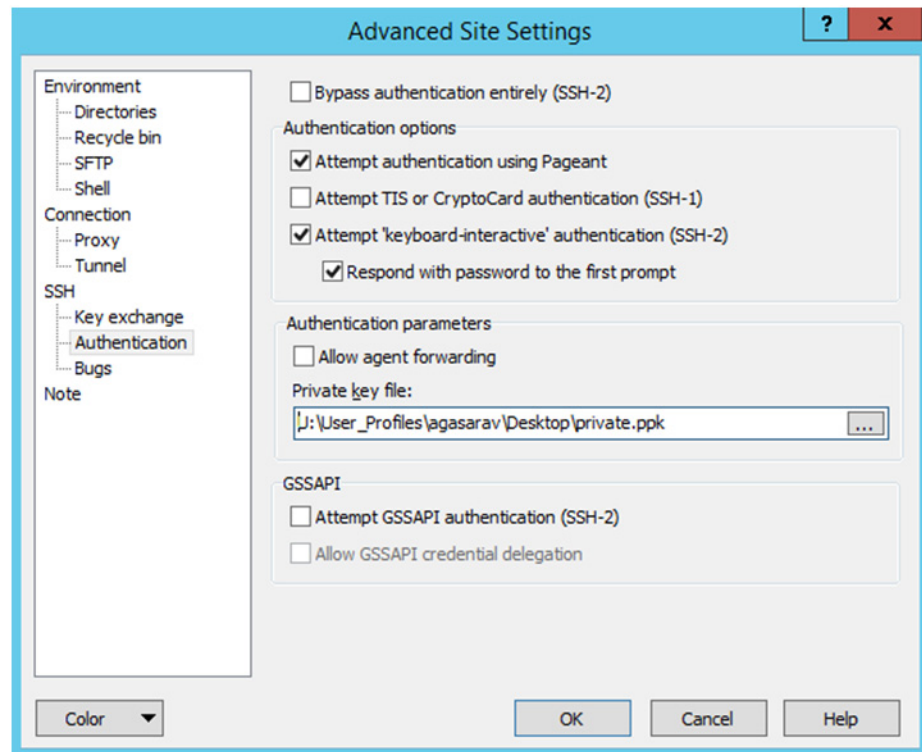
Download Batch Files

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

Figure 2-5 Advanced Site Settings Dialog



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

Figure 2-6 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.
7. Change directory to /<SFTP User>/EXPORT.
8. Download all data files.

Managing User Security

When implementing the Merchandising suite as a cloud service, Merchandising uses Oracle Identity Cloud Service (IDCS) as its identity provider

(<https://www.oracle.com/cloud/paas/identity-cloud-service.html>).

If you are implementing the Merchandising suite on premise, then IDCS is not currently supported and it is recommended that Oracle IDM stack be used instead.

<https://www.oracle.com/middleware/technologies/identity-management/>

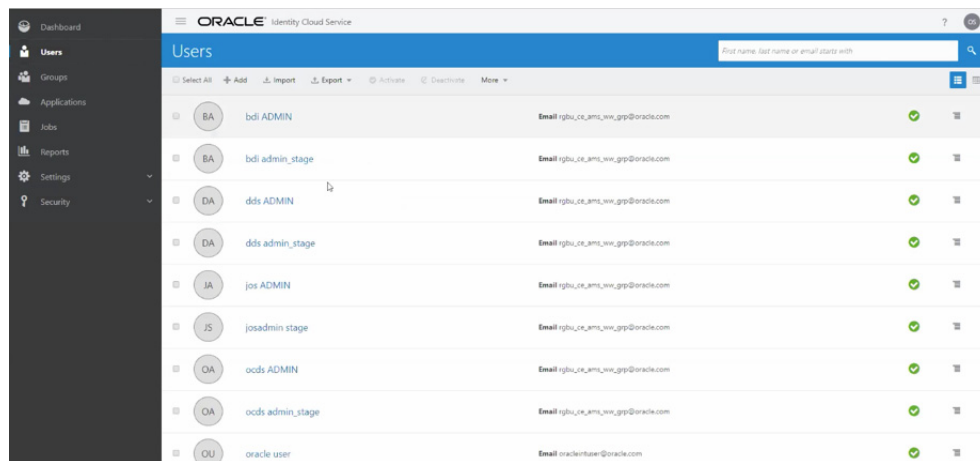
Managing Users in Identity Cloud Service

IDCS is Oracle's cloud native security and identity platform. It provides a powerful set of hybrid identity features to maintain a single identity for each user across cloud, mobile, and on-premises applications. IDCS enables single sign on (SSO) across all applications in your Oracle Cloud tenancy. You can also integrate IDCS with other on-premise applications to extend the scope of this federated identity management.

All application user maintenance is performed by the Identity Domain administrator via IDCS. A key feature of IDCS is that basic user maintenance can be further delegated via identity self-service.

For Merchandising cloud service implementations, all the default roles will be created for you in IDCS for both production and non-production environments, including the administration roles described below. The non-production version of the roles will include a "_PREPROD" extension. This is because a single instance of IDCS will hold both production and non-production roles for your Merchandising cloud solutions, so the names need to be differentiated. These roles should not be removed. If you choose to create any custom roles in IDCS, then it is recommended you use a similar naming convention.

Additionally, a number of users will be added in IDCS for your Merchandising cloud service implementation that are used for running batch processes, web service calls, and so on. These users will be managed by the Oracle Cloud Operations team and should also not be removed.



Managing Users in Oracle Identity Management

The Oracle Identity Management (IDM) platform delivers scalable solutions for identity governance, access management and directory services. This modern platform helps organizations strengthen security, simplify compliance and capture business opportunities around mobile and social access. Oracle Identity Management is a member of the Oracle Fusion Middleware family of products.

Within the IDM platform, Oracle Internet Directory (OID) is a LDAP v3 compliant directory. Oracle Identity Manager (OIM) provides identity governance.

For more information on both of these identity management solutions, see the *Oracle Retail Merchandising Suite Security Guide - Volume 1*.

Managing Application Administrator Access

When application users are created in IDCS, they must be associated with an appropriate Oracle Retail enterprise role to access the Merchandising suite. Some application power users must be assigned Merchandising application administration role(s):

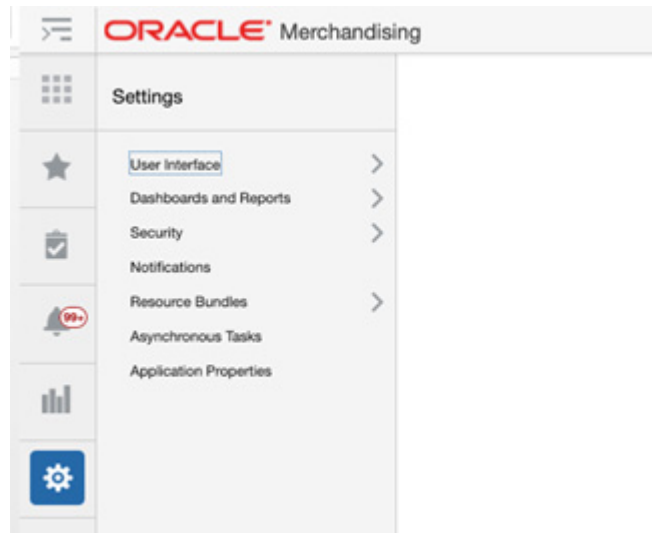
- Merchandising: RMS_APPLICATION_ADMINISTRATOR_JOB
- Sales Audit: RESA_APPLICATION_ADMINISTRATOR_JOB
- Pricing: PRICING_APPLICATION_ADMINISTRATOR_JOB
- Invoice Matching: REIM_APPLICATION_ADMINISTRATOR_JOB
- Allocation: ALLOCATION_APPLICATION_ADMINISTRATOR_JOB

Power users with application administration roles have permissions to UIs which allow them to update the default role to application access mappings. These job roles by default will contain two duties:

- SETTINGS_MENU_DUTY
- ADMIN_CONSOLE_DUTY

The Settings Menu Duty provides access to all the menu options under the Settings menu in each of the solutions, except the Security folder. The Admin Console Duty provides access to the Security option. This allows you to create a new role that assigns only the non-security related duties, if desired.

Figure 3-1

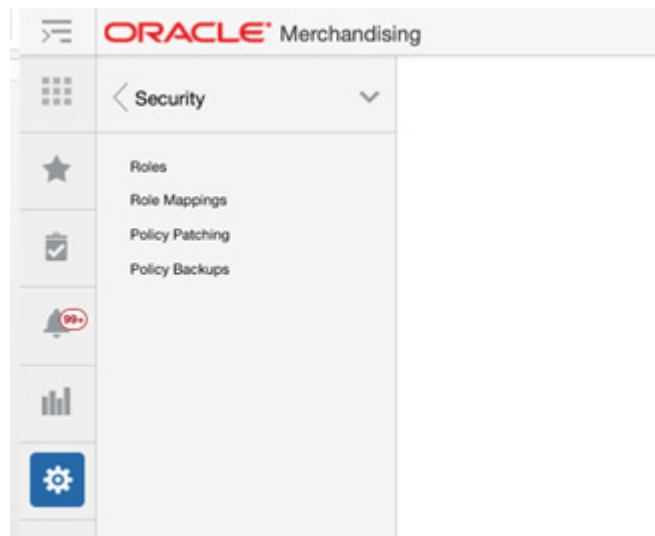


Managing Roles, Duties, and Privileges in the Merchandising Suite

As part of the Merchandising solutions security set up, default enterprise roles and their mappings to application roles are provided with every application. Additionally, each solution has a default configuration of duties assigned to application roles, and privileges assigned to duties. The details for each of these are outlined in volume 2 of the specific solution's security guide. If you wish to change the privileges assigned to base duties, create new duties, or remove or add duties to default roles or your custom roles, you will do this by accessing the Security menu options in the Settings menu in each of the Merchandising solutions.

Note: The roles, duties, and privileges for each solution area are viewed and managed separately. For example, you will not be able to view or update Allocation duties when accessing the security setup from the Merchandising solution.

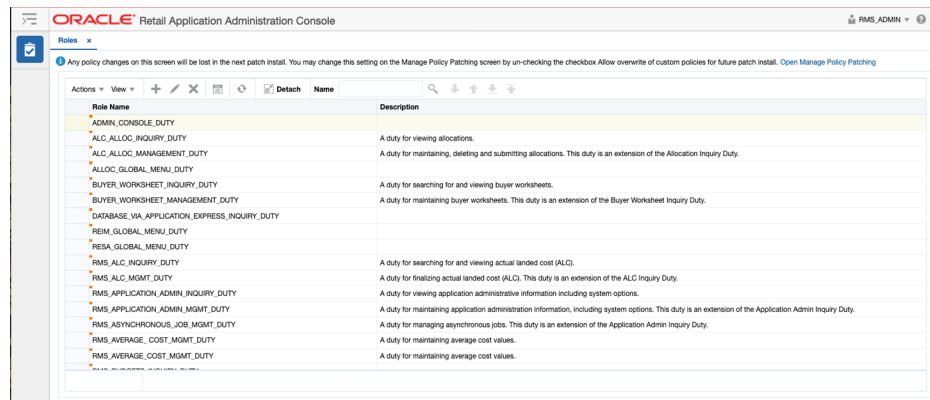
Figure 3–2 Security Menu



Manage Duties

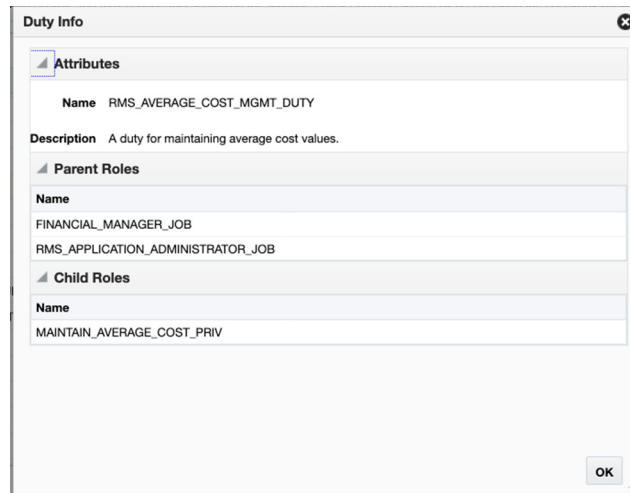
Clicking on the **Roles** option in the Security menu will launch the Oracle Retail Application Administrator Console. This page allows you to view and edit all the existing duties that exist for the solution, including the description of how a duty is expected to be used. You can also add custom duties or remove duties, as needed.

Figure 3–3 Roles Page



Additionally, hovering over the orange square in the top left of each role name allows you to click on the "carrot" that appears to display additional information about the role, including roles it is assigned to, and which privileges are contained in the duty.

Figure 3–4 Duty Info Pop-up

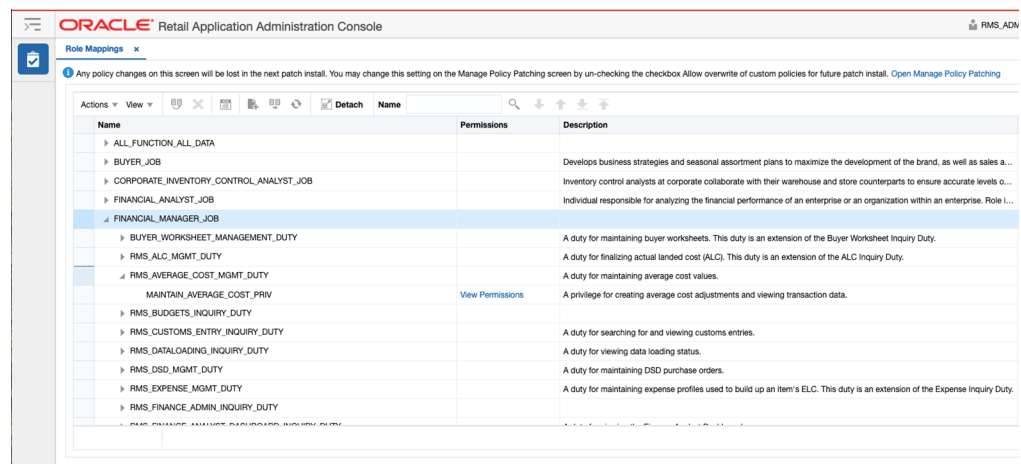


Manage Role Mappings

The relationship between roles and duties and/or privileges is managed in the **Role Mappings** page, which is accessed from the Security menu. Like the Roles screen, this will also launch the Oracle Retail Application Administrator Console. In this screen, you will see all the roles that have had duties and privileges assigned. Clicking on the arrow next to the role name will show you the list of duties currently assigned to the role. Clicking on the arrow next to the duty name will show you the privileges assigned to that duty. Descriptions are also shown for the duties and privileges to help with understanding of what functions they control in the solution. You can also click on the View Permissions link for privileges to see the technical details related to the privilege.

There are several actions that you can take in this screen: Duplicate, Delete, Select and Add, and Remap. You also have the option to export this list to Excel.

Figure 3–5 Role Mappings Page



Duplicate

The Duplicate action allows you to copy the duty and privilege configuration of one role to another. This may be useful if you have two roles that are very similar to each other but have slightly different duties.


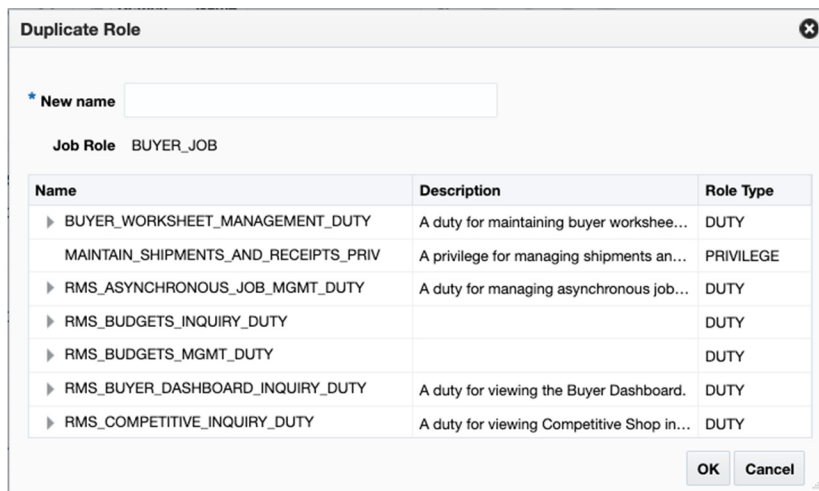

To use this function, highlight the role you wish to copy and select the Duplicate option from the Actions menu or by clicking on the  iconic button. Then, enter the name of the new role where the copied duties and privileges should be added. The application role must not already have duties/privileges assigned in the solution and must have already been created in IDCS prior to this step. Once they are copied to the new role, you can remove any duties or privileges that don't apply or add new.

Figure 3–6 Duplicate Role Page



Delete

The Delete action is enabled when a duty or privilege role is selected. To delete a duty assigned to a role or a privilege assigned to a duty, select the Delete option from the Actions menu or click on the  iconic button.

Note: Any changes to the privileges assigned to duties in this screen will impact all job roles assigned to this duty.

Select and Add


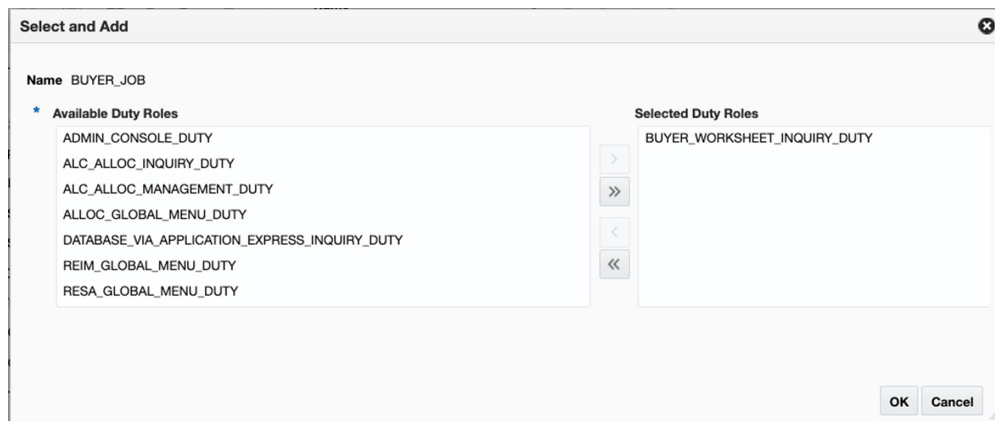


The Select and Add option allows you to add new duties to a role or add new duties or privileges to a duty. To add new duties to a role, highlight the role in the table and then select the Select and Add option in the Actions menu or click on the  iconic button. This will open a popup displaying all the available duties that can be added to the role. Highlight the duties to be added and use the arrows to add to the box on the right. Once all have been added, click OK to save your changes.

Figure 3–7 Select and Add Page

Similarly, to add privileges or child duties to duty, highlight the duty in the table and select the Select and Add option in the Actions menu or click on the  iconic button. Select the duties or privileges from the list of available options and click OK to save your changes. It should be noted that any child duties or privileges you add to a duty will be added to all roles that have the parent duty, not just the selected role.

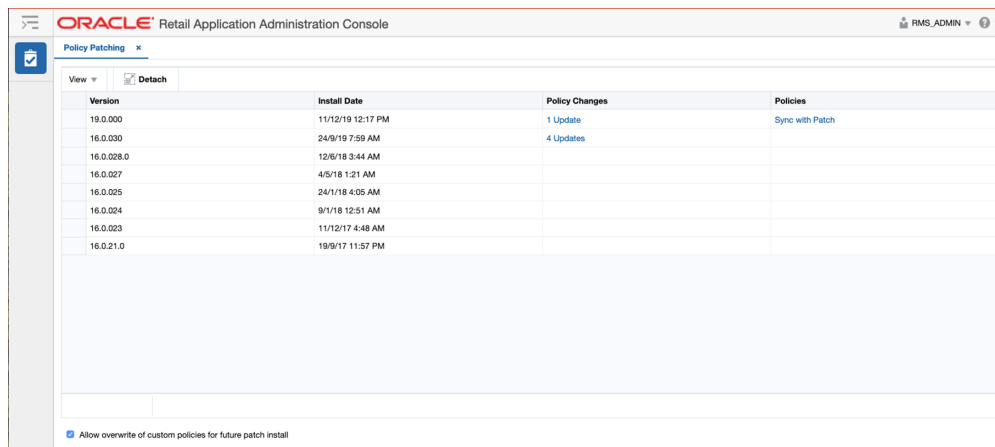
Remap

The Remap action and iconic button () is enabled when a job or duty is selected. The Remap action is used to move mappings from one role to another role. During this process, a new role is created and all the associated roles beneath the previous role are moved into the new role, leaving the old role as an orphan or with other roles associated with it. It is not recommended that this be used in Merchandising solutions. Instead, create a new role using the Duplicate feature.

Policy Patching

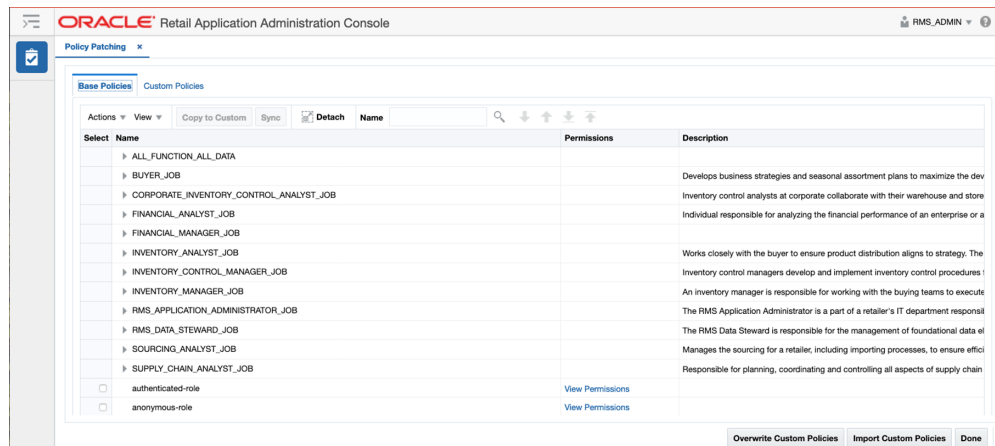
The Policy Patching screen displays two different views. The first view is called the Patch History view. The Patch History view displays the list of patches that have been applied to the solution. The latest patch provides a link to synchronize the changes introduced in the patch with your role configurations. The Patch History view also has a check box at the bottom of the page to indicate whether to overwrite your configurations when the application is patched in the future. By default, this should be unchecked to prevent overwriting of your custom policies when patches are applied, so that you can review and apply changes to how your custom policies have been designed.

Figure 3–8 Policy Patching Page



Click the Sync with Patch link to access the second view, which shows you the base policies and your custom policies.

Figure 3–9 Policy Patching - Base Policies



This view provides a way for you to synchronize the changes introduced in a patch with your configuration. The first tab called Base Policies displays the application policies that came in the patched application. The second tab called Custom Policies displays the application policies that you configured. Details on the changes in duties and privileges are provided in the Advanced Release Notes for each patch.

Copy to Custom

The Copy to Custom action is enabled when a privilege is selected in the Base Policies tab and the privilege does not exist in the custom application policies. The Copy to Custom action copies the privilege to a selected duty in the custom policy setup.

Sync

The Sync action is enabled when a privilege that changed in the patch is selected that exists in the custom policy. The Sync action synchronizes the permissions in the selected privilege with the same privilege in the custom application policy setup.

View Permissions

The View Permissions link is used to display the permissions associated with a privilege. This link opens up a popup that displays the Resource Name, Permission Actions and Permission Class.

Overwrite Custom Policies

The Overwrite Custom Policies action overwrites the current custom policy setup with the base policy in the patched application. The action will cause the loss of your configured policy changes. The action backs up the application policies before overwriting and can be retrieved using the Manage Backups screen.

Import Custom Policies

The Import Custom Policies action overwrites the current application policy setup with the application policies available in a jazn-data.xml file. The action opens up a pop-up, which provides an option to choose a file from your local machine, such as one that you may have created using the Policy Backup screen. This action is useful when migrating policies from one environment to another.

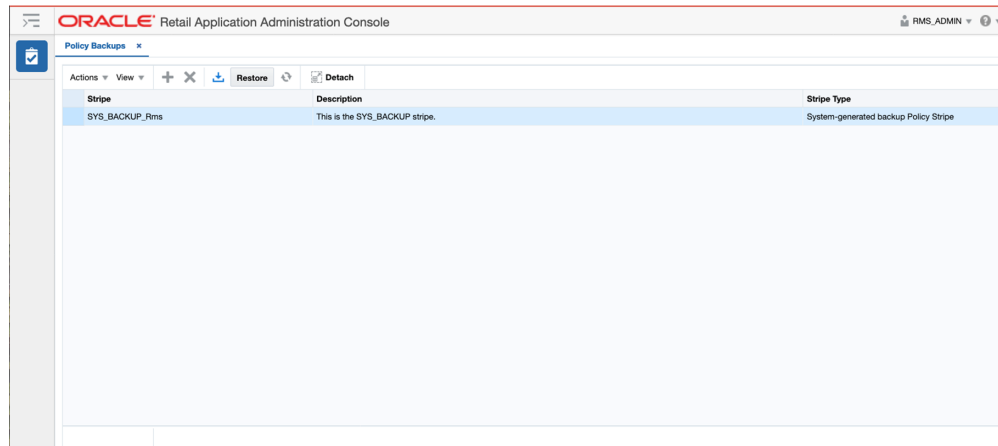
Refresh

The Refresh action is only available in the Custom Policies tab and may be used to refresh the custom application policies. The action can be used to verify the changes in the custom policies after a successful Sync or Copy to Custom action from the base policies.

Note: If a new duty has been introduced in a patch then the Roles page should be used to create the duty and Role Mappings should be used to assign it to the appropriate job roles. Once the new duty role has been created and assigned to a job role, the Copy to Custom action can be used to assign privileges to that duty.

Policy Backups

The Policy Backups screen is used to maintain the application policy backups. The backups can be used to restore the application policies back to the original state if something goes wrong with the application policy setup.

Figure 3–10 Policy Backups Page

The backups can be created by the following actions:

- Before overwriting the application policies during a patch install. The installer created backup is prefixed with the name SYS_BACKUP. The installer overwrites the application policies and creates a backup only if the Allow Overwrite of Custom Policies flag is checked in the Policy Patching screen.
- Selecting the Create action on the Manage Backups screen. The user created backup is prefixed with the name USER_BACKUP.
- Using the Overwrite Custom Policies action on the Policy Patching screen. The Overwrite Custom Policies action creates a backup before overwriting the custom policies. The backup created by the Overwrite Custom Policies action is prefixed with the name SYS_BACKUP.

Create

This action is used to create a backup of the current policies. The backup stripe name will be prefixed with the text USER_BACKUP. The create action opens up a popup where you can enter the comments for why the backup is being taken.

Note: Only one user-initiated backup is allowed. If a backup already exists, it will be overwritten.

Delete

The delete action is used to delete the selected backup stripe.

Download

The download action is used to download the selected backup stripe in an xml format. It will generate a file called backup.xml which can be stored on the device where the browser is running. The xml file can be opened to look at the changes in the backup.

Restore

The Restore action will overwrite the current policy setup with the policies available in the backup.

Refresh

The Refresh action will refresh the backup table.

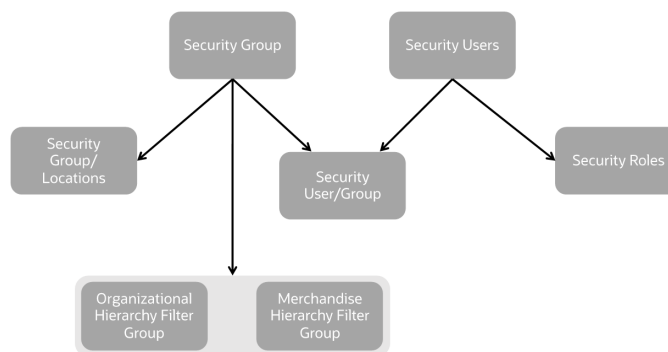
Manage Data Filtering

The Oracle Retail Merchandising suite offers an optional layer of data filtering in the application user interface, which limits the data end users see by levels in the merchandise and organizational hierarchies. Whether or not this is used in your environment is controlled by a system option in Merchandising, which is also where all the configuration for this functionality is managed.

This data level filtering is configured by assigning users to a data security group. If you have turned on this data filtering, you will need to create at least one group and ensure that all your users are added per the directions in the sections below. The group is then assigned to levels of the merchandise and organizational hierarchy. All users within a group will have similar access to a particular section of the merchandise or organizational hierarchy. For example, a group may be defined for a particular division, giving users across application job roles, access to the departments, classes, subclasses, and items in that division. Data filtering is managed in Merchandising, but used in Allocation, Invoice Matching, Pricing, and Sales Audit.

For more information on how filtering is used in each of these solutions, see volume 2 of each solution's security guide.

Figure 4–1 Data Filtering Security Diagram



To setup data filtering, there are several components that must be configured. The sections below outline how to configure each of those components.

Users and User Roles

Security users and user roles define who the application users are, what roles they have in your organization, and what applications they are users of. The setup of users within Merchandising is used for data filtering within the Merchandising suite and for managing user Purchase Order approval amounts.

Note: The role here does not have to be the same as the job roles described in the Managing Roles, Duties, and Privileges section above, however you could use the same names for the roles in data filtering.

The users and user/role combinations for data filtering are managed through spreadsheet download and upload processes. These processes are accessed through the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To manage users and user/role combinations, you will select the template type of Data Filtering from the Download Data screen and then the template Security Users. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice. Once opened, there will be two sheets that can be modified - Security Users and Security User Roles.

Adding a User

To add a new user, first download the spreadsheet and open it. All existing users will be displayed on the Security Users tab. Navigate to an empty row in the spreadsheet and select the Create action. In the User Sequence column enter a unique, numeric identifier of up to 15 digits in length. Then, enter a value in the Application User ID column. The value entered should correspond to the identifier for this user that has been defined in the identity management system and will be the ID that the user uses to log into the Merchandising solutions. The Database User ID column should be left blank. The manager column is optional but is used by Invoice Matching does for grouping invoices in the Employee Workload report for a Finance Manager. If entered, the value entered in this column must be an existing user (User Sequence value). Finally, you must enter or select either Yes or No in each of the application user columns to indicate which applications this user will access. You may also specify security user roles for any new users by following the instructions in the Managing User Roles section.

Updating a User

To update an existing user, first download and open the spreadsheet. In the Security User tab all existing users will be displayed. Select the action type of Update for the user being updated. You may update the Application User ID, Manager, and application User Indicator column values. The User Sequence and Database User ID cannot be updated.

Deleting a Security User

To delete an existing Security User, first download and open the spreadsheet. In the Security Users tab, search for the user that is to be deleted. Select the Delete action in the row. Deleting a user will also remove the deleted user's role details.

Managing User Roles

To manage the roles associated with users, first download and open the spreadsheet. Navigate to the Security User Roles tab. All existing user roles will be displayed. To define a new security role, navigate to a blank row and select the Create action. Enter the User Sequence from the Security Role tab that corresponds to the user you are adding the role for. Next, in the Role column enter the role for the user. Only one role

may be defined for a user. To change the role of an existing user, search for the user in the sheet. Select the Update action for the user you wish to update and enter the new role for the user. To delete a user role, search for the user in the sheet and select the Delete action in the user's row.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, select the template type Data Filtering and the template Security Users. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list.

Note: Because all the tabs in this spreadsheet have a lot of rows, it's recommended that you delete any you are not updating from the template. This will not remove them from the system, but will make your updates process faster. Worksheets and columns in the spreadsheet **cannot** be removed, however.

See also Download/Upload Data from Spreadsheets and View Data Loading Status in the *Oracle Retail Merchandising Do the Basics User Guide*.

Security Groups

Security groups provide a way to group users for purposes of limiting their data access in the Merchandising solutions. This is done by associating them to the merchandise and/or organizational hierarchies to limit the data that is available to the users. If you have data filtering enabled in Merchandising, you need to create at least one security group.

Security Groups are managed through spreadsheet download and upload processes. These processes are accessed through the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To manage security groups, you will select the template type of Data Filtering from the Download Data screen and then the template Security Groups. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice. Once opened, there will be two sheets that can be modified - Security Groups and Security Group Translations.

Managing Security Groups

To manage the security groups, first download and open the spreadsheet. Navigate to the Security Groups tab. All existing user groups will be displayed. To define a new security group, navigate to a blank row and select the Create action. Enter a unique, numeric Group ID to identify the group. Next, in the Group Name column enter a name for the group to make it more easily identifiable. Optionally, you may then enter or select a value in the Business Role column. The valid values for business roles are

maintained in the Merchandising Codes and Descriptions function under code type ROLE. They do not drive any specific function in Merchandising, so are for reference purposes only. Finally, you may enter a value in the Comments column, for example, to state the purpose of the group being defined.

To update an existing group, search for the group in the sheet. Select the Update action for the group you wish to update. The Group Name, Business Role, and Comments may be updated. To delete a group, search for the group in the sheet and select the Delete action in the group's row. Groups cannot be deleted until the usage of this group has been removed from dependent tables, as shown in the diagram above.

Managing Security Group Translations

You can also add a translated description for your security groups, if desired. To manage translations for security groups, first download and open the spreadsheet. Navigate to the Security Group Translations tab. All existing group translations will be displayed. To add a new translation, navigate to an empty row in the spreadsheet and select the Create action. In the Language column select the language that you will be defining the translated group name for. Enter the Group ID for the group that corresponds to the group ID from the Security Groups tab. In the Group Name column enter the translated string for the group in the selected language. To update a translation, search for the group and language you need to update. Select the Update action and update the value in the Group Name column of the row. To remove a translation, search for the group and language you need to remove and select the Delete action in the row.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, select the template type Data Filtering and the template Security Groups. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list.

See also Download/Upload Data from Spreadsheets and View Data Loading Status in the *Oracle Retail Merchandising Do the Basics User Guide*.

Associate Users to Groups

Security users must be associated to security groups in order for data filtering to be applied when users are in the Merchandising solutions. The user to group associations are managed through spreadsheet download and upload processes. These processes are accessed through the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To manage these associations, you will select the template type of Data Filtering from the Download Data screen and then the template Associate Users to Groups. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice. Once opened, there will be one sheet that can be modified - User Groups.

Managing Group / User Associations

To manage the association of users to security groups, first download and open the spreadsheet. All existing associations will be displayed in the User Groups tab. To create a new association between a security group and a user, navigate to a blank row and select the Create action. Enter a security group identifier that has been previously defined in the Group ID column. Next, enter user sequence identifier in the User ID column. A user may belong to more than one group. To remove a previously defined association, search for the row containing the association and select the Delete action in the row.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, select the template type Data Filtering and the template Association Users to Groups. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

Note: Because all the tabs in this spreadsheet have a lot of rows, it's recommended that you delete any you are not updating from the template. This will not remove them from the system, but will make your updates process faster. Worksheets and columns in the spreadsheet cannot be removed, however.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list.

See also Download/Upload Data from Spreadsheets and View Data Loading Status in the *Oracle Retail Merchandising Do the Basics User Guide*.

Filter Groups

Filter groups are a way to associate the defined security groups and the users within the groups to the merchandise and organization hierarchies. These associations control the product and location data that is visible and available for use in the Merchandising solutions for the users in the group. Note that if a security group is not assigned to any merchandise or organizational hierarchy data, users in the group are considered "super users" and will have access to all merchandise hierarchies or all organization hierarchies, respectively.

Filter Groups are managed through spreadsheet download and upload processes. These processes are accessed through the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To manage filter groups, you will select the template type of Data Filtering from the Download Data screen and then the template Filter Groups. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice. Once opened, there will be two sheets that can be modified - Filter Group Organization and Filter Group Merchandise.

Managing Group / Organization Associations

To manage the association of security groups to the organizational hierarchy, first download and open the spreadsheet. Navigate to the Filter Group Organization tab. All existing associations will be displayed. To create a new association between a security group and the organizational hierarchy, navigate to a blank row and select the Create action. Enter a security group identifier that has been previously defined. Next, enter or select a level of the organizational hierarchy in the Filter Org Level column. In the Filter Org ID column enter the identifier for the organizational hierarchy that you are providing the security group access to. For example, if you've chosen Chain as the Filter Org Level you will enter the chain identifier to grant users in the security group with access in the Merchandising applications to locations in the defined chain. To remove a previously defined association, search for the row containing the association and select the Delete action in the group's row.

Managing Group / Merchandise Associations

To manage the association of security groups to the merchandise hierarchy, first download and open the spreadsheet. Navigate to the Filter Group Merchandise tab. All existing associations will be displayed. To create a new association between a security group and the merchandise hierarchy, navigate to a blank row and select the Create action. Enter a security group identifier that has been previously defined. Next, enter or select a level of the merchandise hierarchy in the Filter Merch Level column. In the Filter Merch ID column enter the identifier for the division, group or department that you are providing the security group access to. For example, if you've chosen Division as the Filter Merch Level you will enter the division identifier to grant users in the security group with access in the Merchandising applications to items in the defined division. If you select Class in the Filter Merch Level column you will need to enter a class identifier in the Filter Merch ID Class column in addition to the department in the Filter Merch ID column. If you select Subclass in the Filter Merch Level column you will need to provide a subclass identifier in the Filter Merch ID Subclass column in addition to the department and class. To remove a previously defined association, search for the row containing the association and select the Delete action in the group's row.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, select the template type Data Filtering and the template Filter Groups. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list.

See also Download/Upload Data from Spreadsheets and View Data Loading Status in the *Oracle Retail Merchandising Do the Basics User Guide*.

Associate Locations to Groups

Associating security groups to locations can be done to manage the locations that a user can view and update transfers in to or out from. The associations of user groups to locations is managed through spreadsheet download and upload processes. These

processes are accessed through the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To manage the association of user groups to locations, you will select the template type of Data Filtering from the Download Data screen and then the template Associate Locations to Groups. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice. Once opened, there will be one sheet that can be modified - Location Groups.

Create an association between a user group and locations

To create a new association between a user group and locations, first download the spreadsheet and open it. All existing associations will be displayed. Navigate to an empty row in the spreadsheet and select the Create action. In the Column Code column select or enter either Transfers From or Transfers To. Selecting Transfers From indicates that you are intending to define an association to a user group to restrict the transfers users in the group can view or update based on the from location of the transfer. Selecting Transfers To indicates that you are intending to define an association to a user group to restrict the transfers users in the group can view or update based on the to location of the transfer. Next, enter a previously defined security group identifier in the Group ID column. Next, to define the locations you must enter either a region identifier in the Region column, a district in the District column, a store in the Store column, or a warehouse in the Warehouse column. If defining the locations at a district level you must enter both a region and a district. Lastly, you must enter or select either Yes or No in the Select Indicator and Update Indicator columns. A value of Yes in the Select Indicator column means users in the group will be able to view transfers containing the specified location(s) as the from or to location, depending on the Column Code value. A value of No indicates they will not be able to view them. A value of Yes in the Update Indicator column means users will be able to update transfers containing the specified location(s) as the from or to location, depending on the Column Code value. A value of No indicates they will not be able to update them. In order to select Yes in the Update Indicator column, the value in the Select Indicator column must be Yes. Repeat the above steps to define additional associations as required.

Updating an association between a user group and locations

To update an existing association, first download and open the spreadsheet. All existing records will be displayed. Select the action type of Update for the user being updated. Only the Select Indicator and Update Indicator may be updated. To redefine a groups association to locations you have to delete and re-create them.

Deleting an association between a user group and locations

To delete an existing association, first download and open the spreadsheet. Search for the record that is to be deleted and select the Delete action in the row.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, select the template type Data Filtering and the template Associate Locations to Groups. This will generate a process description automatically, but this can be updated

if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

Note: Because all the tabs in this spreadsheet have a lot of rows, it's recommended that you delete any you are not updating from the template. This will not remove them from the system, but will make your updates process faster. Worksheets and columns in the spreadsheet cannot be removed, however.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list.

See also Download/Upload Data from Spreadsheets and View Data Loading Status in the *Oracle Retail Merchandising Do the Basics User Guide*.

Order Approval Amount by Role

An optional layer of validation can be added in Merchandising to approval of purchase orders that restricts users to the ability to approve a purchase order that is valued over a certain amount based on either the cost or retail value of the order. The determination of whether cost or retail is used is based on a system option Order Approval Basis. The approval limitations are defined by role and are always entered in terms of the primary currency for your implementation.

Adding, updating, or removing roles from the order approval limits are managed through spreadsheet download and upload processes. These processes are accessed through the main Merchandising task list under Foundation Data > Download Foundation Data and Foundation Data > Upload Foundation Data.

To add, update, or remove approval limits, select the template type of Security from the Download Data screen and then the template Order Approval Amount by Role. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice. Once opened, there will be one sheet that can be modified - Role Privileges.

Add Order Approval Amounts

To add privileges for a new role, in a blank line in the template, select the action type of Create. Next enter the role ID, which can be up to 30 characters in length. This role ID must match one on the Security User Roles table. Next enter the amount that this role is limited to in the Order Approval Amount column, based on the cost or retail value of the order as described above. This value should be in the primary currency. Any purchase orders that are less than or equal to the amount entered in this field will be able to be approved by users assigned to this role. Any that are of a larger value will not be able to be approved. For users that can approve any order, it is recommended that the order approval amount be set to the maximum allowed in this field - 99,999,999,999,999,999.

Update Order Approval Amounts

If you would like to update the order approval amount for any roles, a similar process will be followed as that described above for adding limits. First, download the spreadsheet and then find the role that you would like to update. In that row select the action type of Update, and then correct the order approval amount in the spreadsheet.

Delete Role Privileges

If you wish to delete a role, then update the action column to select Delete in the row containing the role you wish to remove. Note that users assigned to roles that are not on this table cannot approve an order, as their upper threshold for approval is assumed to be zero.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, select the template type Security and the template Order Approval Amount by Role. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list.

See also Download/Upload Data from Spreadsheets and View Data Loading Status in the *Oracle Retail Merchandising Do the Basics User Guide*.

Notifications

From the Settings menu, you can access the Notifications option. Selecting this option will open the Notifications page in the Retail Application Administrator Console. This page will display two tables.

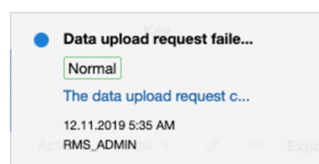
Figure 5–1 Notifications

| Name | Retention Days | Type Code | Description | Email Address |
|--------------------------------|----------------|--------------------------------|--|---------------|
| Purchase Order Rejected | 30 | Purchase Order Rejected | Purchase Order Rejected | |
| Transfer Rejected | 30 | Transfer Rejected | Transfer Rejected | |
| PO Induction Upload Complete | 30 | PO Induction Upload Complete | Order upload request complete | |
| PO Induction Upload Failed | 30 | PO Induction Upload Failed | Order upload request failed | |
| PO Induction Download Complete | 30 | PO Induction Download Complete | Order download request complete | |
| PO Induction Download Failed | 30 | PO Induction Download Failed | Order download request failed | |
| Item File Upload Complete | 30 | Item File Upload Complete | Item file upload request complete | |
| Item File Upload Failed | 30 | Item File Upload Failed | Item file upload request failed | |
| PO File Upload Complete | 30 | PO File Upload Complete | Order file upload request complete | |
| PO File Upload Failed | 30 | PO File Upload Failed | Order file upload request failed | |
| Cost File Upload Complete | 30 | Cost File Upload Complete | Cost Change file upload request complete | |
| Cost File Upload Failed | 30 | Cost File Upload Failed | Cost Change file upload request failed | |
| New Item Loc Complete | 30 | New Item Loc Complete | Item Location create request complete | |
| New Item Loc Failed | 30 | New Item Loc Failed | Item Location create request failed | |
| Item Induction Upload Failed | 30 | Item Induction Upload Failed | Item upload request failed | |

The top table shows the notification types that are configured in the solution, along with the number of days that the notifications will be retained when they occur for a user. Existing notifications can be edited to change the type code and description, along with the retention days. Retention days must be a number greater than zero, or it can be set to -1 to keep the notification indefinitely, unless deleted by a user. However, this is not recommended.

The description is displayed in the notification displayed to the user:

Figure 5–2 Data Upload Request Notification



You can also add one or more email addresses to have a message sent when the action occurs to trigger a notification.

New notifications can be added in on premise implementation of Merchandising solutions only. Adding new notifications also would require customization if you want the action to be triggered from an action within the application.

Deleting a notification type removes the notification type and all of the notification type's associated roles and groups. Any past notifications are also removed from user's queues.

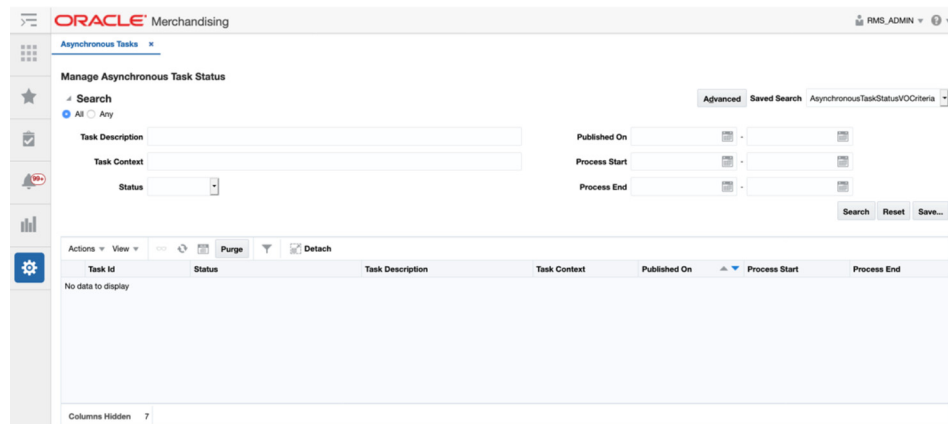
The second table in the screen is used to create groups for the notification type selected in the top table. Click the Create iconic button (+) to create a new group. Then, associate roles or another group with the group by selecting the Add Job Role iconic button (👤+) or the Add Notification Groups iconic button (👥). This will allow the notification to be delivered to all users assigned to the roles configured for the group. If no group is assigned, then the notification is delivered to the user who initiated the action the created the notification.

Asynchronous Tasks

Asynchronous tasks are background processes launched by users of the Merchandising solutions. For example, you may use this to troubleshoot an asynchronous task that you failed to receive a notification for. The information in this screen should be included in any SRs logged in helping resolve asynchronous issues. Note: this is not used for Merchandising or Sales Audit.

Administrators can view the latest status of asynchronous tasks through the Manage Asynchronous Task Status page, which is accessed from the Settings menu by selecting Asynchronous Tasks. To view tasks, enter search criteria and click Search. Click the View option in the Actions menu, or the View iconic button, to view more details on the task. Click the Refresh option in the Actions menu, or the Refresh iconic button, to refresh the data with the latest tasks. You can also purge asynchronous tasks present in the system, if desired. Otherwise, the tasks will be purged as configured in Application Properties.

Figure 5–3 Asynchronous Tasks



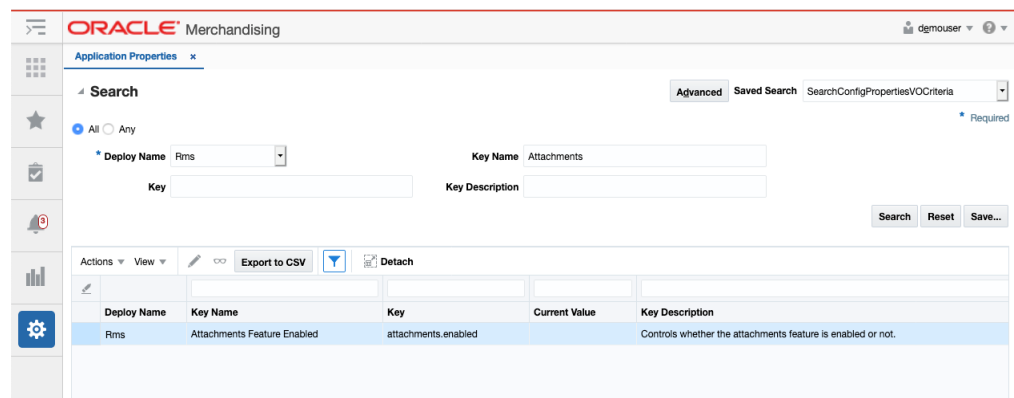
Application Properties

The Application Properties screen allows administrators to search for and modify configuration properties by deployment. The key function of this in Merchandising solutions is to enable the Attachments function in Merchandising and Invoice Matching. It is strongly recommended that no other changes are made in this screen as the majority of the options listed are installation related and should not be changed after initial installation. If you have questions on any of the properties, please log an SR to get more details.

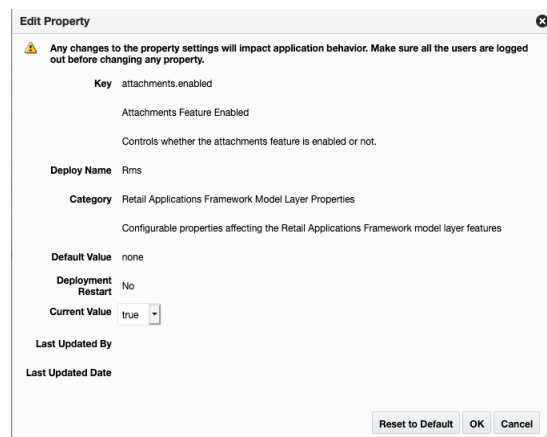
Enabling Attachments

To enable the attachments feature in Merchandising and Invoice Matching, you will need to do the following:

1. Select **Settings > Application Properties**
2. In the search criteria, enter RMS or ReIM as the Deploy Name and type Attachments in the Key Name field. Then click **Search**.
3. This should return one row, similar to what is shown below.



4. Click on the **Edit** iconic button or select **Edit** from the Actions menu. This should display a popup that looks like the below image. To enable attachments, change the Current Value to true.



5. Then click **OK** to save your changes.
6. Validate that the Attachments pane is visible in one of the screens that supports this function:

1. **Merchandising:** Item, Item Supplier, Item Supplier Sourcing Country, Item Location, Order Header, and Order Details.
2. **Invoice Matching:** Document Maintenance

To later disable this feature, follow similar steps, but set the Current Value to false instead.

Data Viewer

Data Viewer is a workspace that provides read-only access to the Merchandising functional data in production environments and read/write access in non-production environments. In production environments, this extension is a workspace for customer support personnel to view the data to troubleshoot issues. In non-production environments, there is more flexibility to assist with conversion of data, configuration of the solution, and some minor data correction, when required. This chapter provides the steps to configure your workspace in a SaaS environment. This will need to be done for each of your environments where you want this enabled.

Workspace

A workspace <RETAILER_WORKSPACE> is predefined for you and is where workspace users can view the application data. The workspace has the privilege to the allocated <RETAILER_WORKSPACE_SCHEMA> database schema. The schema has the synonyms with read only privileges (in production) or read-write privileges (in non-production) to the Merchandising database tables and views. There are a few tables that are excluded, which are either used internally only (e.g. temp tables) or tables in the encrypted schema.

Users and Roles

Data Viewer has two types of users, workspace viewer and workspace administrators. As a workspace administrator, you can create and edit workspace viewer accounts, monitor the activities.

For SaaS implementations, the first time that you access the Data Viewer, only the person designated as your initial service administrator (e.g. the receiver of the welcome email) will be setup with access. You will need to log in with that username/password in order to provide other users with access, including other administrators. Before you create accounts for your users, you must create users in Identity Cloud Service (IDCS) with the same user name.

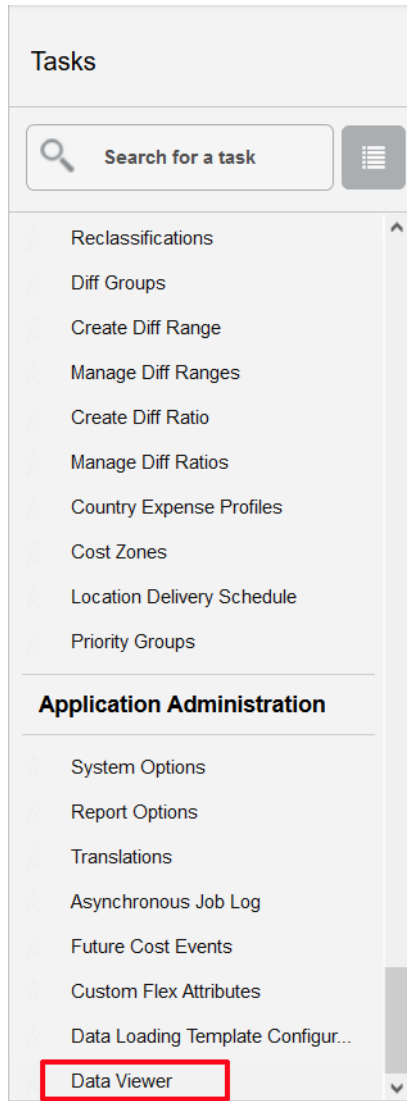
Create a Workspace Viewer

Perform the following procedure to create a workspace viewer:

1. Log in to Merchandising.¹
2. From the Tasks list, under Application Administration, select Data Viewer.

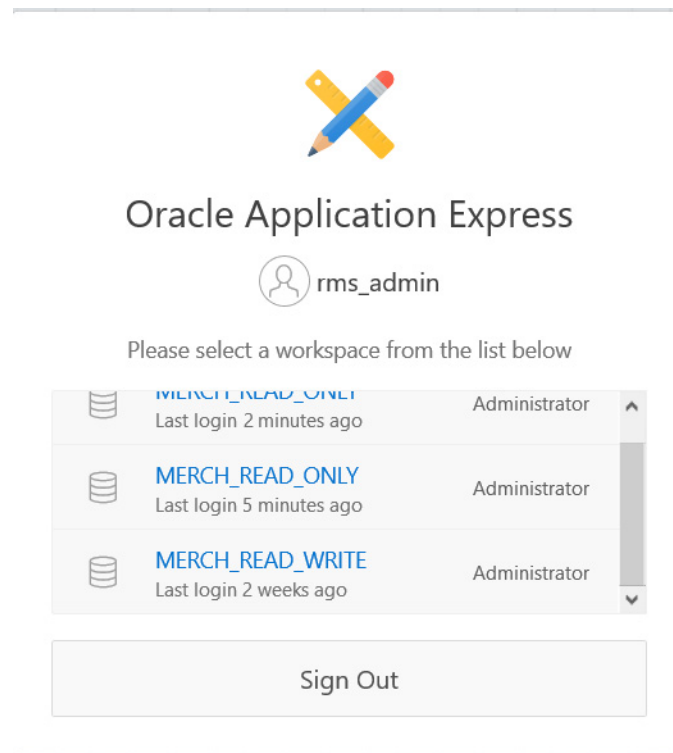
¹ Although data from other Merchandising cloud services can also be viewed using this capability, the only access for this link is in Merchandising.

Figure 6–1 RMFCS Tasks Menu

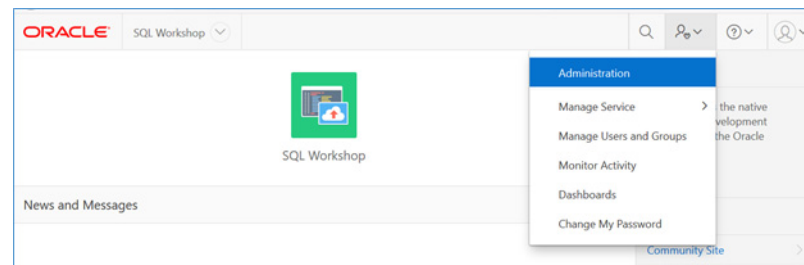


Note: If you do not see this link, validate that your role is associated with the DATABASE_VIA_APPLICATION_EXPRESS_INQUIRY_DUTY and/or VIEW_DATABASE_VIA_APPLICATION_EXPRESS_PRIV.

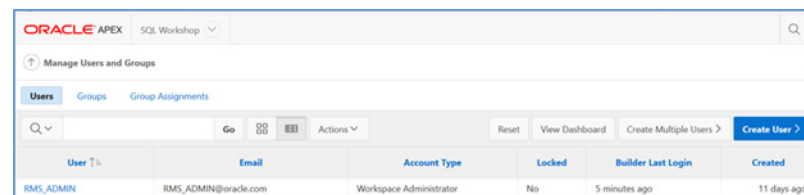
3. Select the appropriate APEX workspace.

Figure 6–2 APEX Workspace Selection Dialog

- From the Administration drop down menu, select Manage Users and Groups.

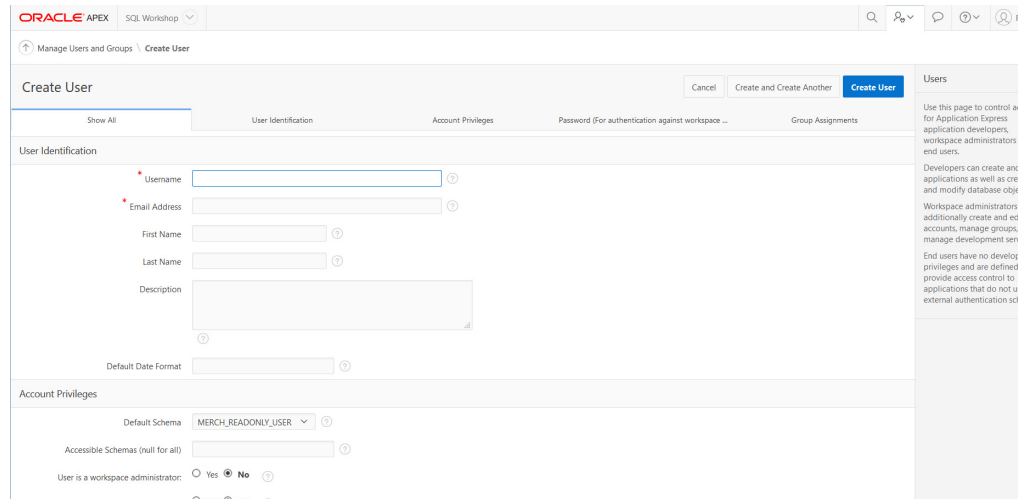
Figure 6–3 APEX Administration Drop Down Menu

- From the Manage Users and Groups window, click Create User.

Figure 6–4 Oracle APEX Manage Users and Groups Window

6. From the Oracle APEX Create User window, create a new workspace viewer account and ensure that the default <RETAILER_WORKSPACE_SCHEMA> is assigned.

Figure 6–5 Oracle APEX Create User Window



7. Assign the new workspace viewer with the following settings:
 - User is a workspace administrator – No
 - User is a developer – Yes
 - App Builder Access – No
 - SQL Workshop Access – Yes
 - Team Development Access – No
 - Set Account Availability – Unlocked
 - Require Change of Password on First Use – No
8. Once all information is entered, click Create User to complete the user creation.

Note: The users you are creating in Data Viewer should already exist in IDCS. See also the Oracle documentation on *Application Express* for more details on using this tool.
