

Oracle® Retail Merchandise Financial Planning Cloud Service Administration Guide



Release 25.2.401.0
G42509-01
October 2025

ORACLE®

Copyright © 2025, Oracle and/or its affiliates.

Primary Author: Bernadette Goodman

Contributing Authors: Venkatachalam Thiagarajan

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Send Us Your Comments

Preface

Audience	i
Documentation Accessibility	i
Improved Process for Oracle Retail Documentation Corrections	i
Oracle Retail Documentation on the Oracle Help Center (docs.oracle.com)	ii
Conventions	ii

Administration Process

Oracle Support	ii
----------------	----

1 MFP Batch Task Administration

Administration-Specific Batch Tasks	1
Run Batch Measure Load Group	2
Run Batch Measure Export Group	2
Run Batch Calc Group	3
Weekly Batch Calc (calc_week)	3
Set Export Flags (calc_exp_set)	4
Run Batch Task Group	4
Daily Batch (batch_daily)	5
Weekly Batch (batch_weekly)	5
Load Hierarchies (load_hier)	6
Export All Approved Plans (export_all)	6
Export All Working Plans (export_wp)	7
Exports to Shared Services (export_ss)	7
Post Build Batch (postbuild)	7
Post Build Hierarchy (post_hier)	7
Post Patch Batch (postpatch)	8
Export for Egress (exp_egr)	8
Export Plans to RI (exp_plan_ri)	8

Set Dimension Attributes (batch_datr)	8
Import Hierarchies (imp_hier)	8
Import Actuals (imp_data)	9
Import Forecasts (imp_fcst)	9
Scheduling Configured Batch Administration Tasks	10
Dashboard	15
Retail Home	18

2 Build/Patch Application

Build the MFP Cloud Application from the Bootstrap Domain	1
Bootstrap Environment	1
Build Application from the Bootstrap Domain	2
Patching the Application	5
Template Status	9

3 User and Role Maintenance

User Maintenance through OCI IAM	1
OCI IAM User Creation	1
Adding a User Group	3
Managing Users in OCI IAM	4
Bulk Loading of User and User Groups	5

Send Us Your Comments

Oracle Retail Merchandise Financial Planning Cloud Service Administration Guide, Release 25.2.401.0

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

Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

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

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note

Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the Online Documentation available on the Oracle Help Center (docs.oracle.com) web site. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: retail-doc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our web site at <http://www.oracle.com>.

Preface

This document describes the administration tasks for Oracle Retail Merchandise Financial Planning Cloud Service.

Audience

This document is intended for administrators.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Improved Process for Oracle Retail Documentation Corrections

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

Oracle Retail documentation is available on the Oracle Help Center (docs.oracle.com) at the following URL:

<https://docs.oracle.com/en/industries/retail/index.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 an document with part number E123456-01.

If a more recent version of the 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 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.

Administration Process

The intent of this document is to guide a Merchandise Financial Planning Cloud Service (MFPCS) Administrator to perform the recurring administrative activities for the MFPCS application. This document outlines all administration activities required to support a live MFPCS application. In some cases, the detail will be explained in this document, and in other cases, the process will be covered here and details will be explained in the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

The MFPCS Administrative activities can broadly be classified into two categories. This document follows these categories and provide details for the tasks within them.

Regular Activities:

- MFP Batch Task Administration
- Build/Patch Application

Ad-hoc Activities:

- User and Role Maintenance
- Monitor Domain Performance

Regular Activities

Once a MFPCS solution is live, the Administrator is responsible for two key activities that occur on a regular basis. The first of these activities is managing the weekly/daily batch which loads and exports data required for the MFPCS users to create, manage, and share their merchandise financial plans. Internally, it also does the calculations for necessary data aggregation.

The MFPCS Admin task offers a broad range of options to the Administrator to configure the batch run and maintenance. This document also provides a concise view to the Administrator on troubleshooting when the batch fails or diagnosing rejected records, importing/exporting of data files, reading logs, and modifying the scheduled batch to work around system maintenance or patch periods.

Patch uptake is another recurring task that an Administrator needs to be familiar with. This document walks through the process of taking a monthly patch and the specifics the Administrator needs to take care of.

Ad-hoc Activities

The Administrator generally comes across certain jobs on an as-needed basis. For example, the need occasionally arises to do the following:

- Add a new user who just joined the team/organization and needs to use the MFPCS application.
- Remove an existing user who has left the organization and needs to be removed from the MFPCS environment.
- Manage a user's access when the role changes within the organization.

This document describes the application-specific necessary actions.

The Administrator can leverage the standard Online Administration Tools (OAT) tasks on an ad-hoc basis without scheduling the task daily or weekly. Ad-hoc administrative activities include properly managing the reclassification of product so that planners can continue their work without interruption, monitoring domain related information to maintain system performance, loading a hierarchy from OAT, and so on, are several jobs the Administrator needs to perform intermittently. For more details about the standard Administrative Tasks applicable to all Planning Solutions, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Oracle Support

It is requested that all retailers submit Oracle Retail Merchandise Financial Planning Cloud Service support requests through a single point-of-contact for each environment; the system administrator is usually designated to perform this role. For the maintenance of bulk user and roles, Oracle Support is a smart solution.

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

<https://support.oracle.com>

To learn more about how Oracle Support works, go through the following training at the My Oracle Support website:

- My Oracle Support (MOS) or Cloud Support Portal for New Users - A Getting Started Resource Center (Doc ID 1959163.1)
- How-to use My Oracle Support - Customer User Administrator (CUA) Role and Responsibilities (Doc ID 1544004.2)
- Oracle Support Accreditation - Series Index (Doc ID 1583898.1)

MFP Batch Task Administration

The Merchandise Financial Planning (MFP) Cloud Service batch task is a powerful tool provided to the Administrator to manage periodic load/export of Data/Hierarchy from the front end, eliminating the cumbersome effort of scheduling and running the batch from the back end domain server.

MFP Cloud Service uses the Oracle Retail Predictive Application Server Cloud Edition (RPASCE) Online Administration Tools to schedule RPASCE services to run batch on the Cloud. Administrative users can view the results of the scheduled services in the log on a dashboard through the RPASCE front end.

RPASCE Online Administration Tools support the scheduling of standard RPAS utilities and, in addition, scheduling application-specific services. For a detailed understanding of the Online Administration Tools, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

JOS/POM is used to schedule pre-configured jobs from MFPCS. Any jobs scheduled using JOS/POM from planning applications, in turn will only schedule the jobs as an OAT task which can also be monitored using OAT dashboards like any other tasks scheduled directly within the application.

The following sections explain the application-specific administration tasks that are pre-configured for MFP Cloud Service. These tasks are only applicable for Template implementations.

For non-Template type implementations, the Configured Batch Tasks can be fully configured by making changes to the batch control files. For information about changing the batch control files and how to upload them, see the *Oracle Retail Predictive Application Server Cloud Edition Implementation Guide*.

Customers using Template versions can also customize the tasks by changing the control files as part of the Extensibility framework. For allowed changes, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Administration-Specific Batch Tasks

The application-specific batch tasks are a set of tasks that help the Administrator to load/export a predefined set of data and hierarchies. These tasks are found in the Online Administration Tools as Configured Batch Tasks.

Each task in turn calls predefined batch services to do the required tasks. MFP Cloud Service uses the batch framework to define the batch process.

Some tasks require input data files or hierarchy files as input. These files must be uploaded before the tasks are scheduled. Some tasks export files out of the application. Those files are copied to Object Storage, and Administrators can download these exported files.

For more details about how to upload files to Object Storage and the file name convention used for different type of files, see the *Oracle Retail Predictive Application Server Cloud Edition Implementation Guide*.

If the customer is planning to use RDX to get the integration data from RAP, the Batch Uses RDX flag should be enabled in the application the client UI in MFP Setup -> Manage Batch -> Manage Batch worksheet. Based on that flag, additional steps will get executed during the batch.

The following list shows the application-specific administration tasks that are pre-configured for MFP Cloud Service under Configured Batch Tasks:

- Run Batch Measure Load Group
- Run Batch Measure Export Group
- Run Batch Calc Group
- Run Batch Task Group

These batch tasks are explained in detail in subsequent sections. There are some additional tasks available under Configured Batch Tasks which are generic RPAS-specific tasks. Details about the RPAS-specific tasks can be found in the Batch Administration section in the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Run Batch Measure Load Group

This task is used to load a predefined set of measures grouped as a measure set in the batch control file `batch_loadmeas_list.txt`. These set of measures can be loaded together. Actuals Data is a named set of load measures in the batch control file. If the Administrator decides to load the measure set for Actuals Data, the Administrator needs to load data for measures which includes measures such as Ty Sales Clr R and TY Sales Clr U. All required data files must be uploaded to Object Storage. If there is no file present to load a particular measure in that measure set, it will be logged as not found and skipped.

This process will only load the data into those measures and will not run any subsequent calculations. The Administrator may need to schedule the necessary Run Batch Calc Group task after scheduling this task in order to process the loaded data.

The Predefined Measure Load Options in MFP are listed below:

- Actuals Data (load_act) - To load all the measures containing actual data as needed such as Sales, Inventory, Receipt, Shrink, and so on.
- On Order Data (load_oo) - To load only On Order data files.
- Admin Data (load_adm) - To load planning administration level data such as VAT %, Currency Conversion Rates, Week Mapping, and so on.
- Forecast Data (load_fcst) - To load Forecast Data, if the customer is planning to load forecast data from external systems other than from AI Foundation in RAP integration.
- Portfolio Opt Data (load_mpo) - To load Portfolio Optimization Data, if the customer is planning to load Portfolio Optimization data from external systems in file format.

For details about the list of measure files that are loaded for different measure sets and information on the data file formats, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Run Batch Measure Export Group

This task exports a predefined set of measure data into flat files. The predefined set of measures to be exported are defined in the batch control file `batch_exportmeas_list.txt`. This set of exported data can be used for integration with other applications. Typically, the data exported can be interfaced to an external database that can be used to create reports or

queries by users who need Planning data. The Administrator needs to schedule the Set Export Flags under the Run Batch Calc Group task to set the required export flags before scheduling this task. Exported files for this task are put into the Object Storage location; the Administrator can download the files from this location.

The standard exports from MFP are available to the retailer to use by any downstream applications which need MFP plan data. Default approved plan standard exports are included as part of the daily and weekly batch.

The predefined options for these tasks are listed below:

- Merch Plan - Current Plan (mpcp)
- Merch Plan - Original Plan (mpop)
- Merch Plan - Submitted Plan (mpwa)
- Merch Plan - Working Plan (mpwp)
- Merch Target - Target Plan (mttg)
- Merch Target - Working Plan (mtwp)
- Location Plan - Current Plan (lpcp)
- Location Plan - Original Plan (lpop)
- Location Plan - Working Plan (lpwp)
- Location Target - Target Plan (lttg)
- Location Target - Working Plan (ltwp)

For details about the different versions for export, the list of measures exported in each file, and the file name and format details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Run Batch Calc Group

This task is used to run a predefined set of all batch rules (as batch calc sets) against the domain to do the necessary data aggregation that is defined in the batch control file `batch_calc_list.txt`.

The following predefined batch calculation sets are available in MFP:

- Weekly Batch Calc (calc_week)
- Set Export Flags (calc_exp_set)

Weekly Batch Calc (calc_week)

This batch calc set is used to run all required batch process calculations to do the necessary data aggregation and inventory roll operations after the weekly data load. It internally runs the batch rule groups Batch_RMS_G, Batch_RMS_L, Batch_GB, Batch_WH_Init, Batch_AggW, and Batch_InvRoll.

This allows the users to see actualized data for the current elapsed week such as sales, markdowns, and receipts as well as inventory for both current and recalculated for future periods. This also allows users to see a sales forecast based on actuals that have been loaded and apply the trend to go forward weeks.

This process runs as part of a Weekly Batch. This task may be also scheduled if a retailer has data issues and needs to reload corrected actual data files in the middle of week and reprocess the week batch calculation.

Batch_RMS* rulegroups are used to transfer data from RMS Integration specific measures to internal measures. Batch_GB sets the elapsed measures and runs domain calcs for the Location Target measures. Batch_WH_Init initializes calcs for Warehouse specific measures. Batch_AggW copies all loaded actuals into the WP and CP versions for the elapsed periods. Batch_InvRoll rolls forward the new EOP of the elapsed periods to the future BOP and EOP for both the WP and CP versions.

Set Export Flags (calc_exp_set)

This batch calc set is used to set the necessary export flags for all standard exports used by MFP Cloud Service. The user can control the position exported for all versions by setting the administration measure addvexportb Export Mask in the Manage Export view. If the Export Elapsed Periods flag is set to false (the default), it will not export elapsed period data. This task sets export flags for each version of exports based on the Export Mask. For approved and submitted plans, the export flag is set based on the Export Mask and Approved or Submitted Info measure. For working plans, it is set based on the Export Mask and Seeded Info measures.

By default, daily and weekly batch runs these calculations before running an export. It can be turned off during the daily or weekly batch by turning off the Boolean admin measures Enable Daily Exports and Enable Weekly Exports in the Manage Batch view. The Administrator needs to run this task only if they have changed the export settings and wants to create an on-demand plan data export.

Run Batch Task Group

This task is used to schedule a predefined set of batch tasks such as load measure, batch calc, and batch exports in a sequential order. The batch control file batch_exec_list.txt defines the steps in the specific order that will be executed during batch task execution. This task is used to schedule a typical daily or weekly MFP Cloud Service batch. The customer may need to use this only if they are not using JOS/POM to schedule their batch jobs. If they use the JOS/POM to schedule the daily or weekly batch jobs, they in turn call this pre-configured batch task

If any task aborts, a log is created and the process terminates. This task has the option to restart from the last failed service rather than running all the completed services again.

Note

Typically, the Administrator must schedule this task within a time frame after a domain backup and when no users are logged into the domain because this task runs in domain exclusive mode. The Administrator must work with Oracle to find out the time of backups and any other jobs.

The following predefined batch sets are available:

- Daily Batch (batch_daily)
- Weekly Batch (batch_weekly)
- Load Hierarchies (load_hier)
- Export All Approved Plans (export_all)
- Export All Working Plans (export_wp)
- Export Plans to RI (exp_plan_ri)

- Exports to Shared Services (export_ss)
- Post Build Batch (postbuild)
- Set Dimension Attributes (batch_datr)
- Import Hierarchies
- Import Actuals
- Import Forecasts

Daily Batch (batch_daily)

This task is used to schedule a daily plan data export and load on-order files. A retailer may need on-order on a daily basis during an open-to-buy for example.

If a daily load or export is not needed, this step can be skipped as they are scheduled in the weekly load/export process. Steps in this process are also part of the Weekly Batch, so they do not have to schedule this during weekly batch.

Also, if the retailer does not need exports on a daily basis, they can skip scheduling this process.

This task runs the following set of activities in this order:

- Run Batch Calc: Set Batch Specific Flags
- If Enable Daily Exports is set to true: Set Export Flags and Export All Plan Versions
- Measure Load: Load On Order and Process On Order
- Rebuild Dashboard

Weekly Batch (batch_weekly)

This task is used to schedule a typical weekly MFP batch, which includes loading all hierarchy files and actual data and running all batch aggregations tasks needed for inventory roll. This task is the main task that needs to be scheduled to run on a weekly basis so the Administrator can see the most up-to-date location and product structures and information. Before scheduling this task, all necessary hierarchy and data files need to be uploaded to Object Storage. If the customer is planning to get data using RAP integration, the Batch Uses RDX flag should be enabled to get the data from RAP. This task runs the conditional execution of different tasks based on the various batch control flags set in the application.

This task runs the following activities in this order:

- If Batch Uses RDX is true: Export Plans to RI
- If Enable Weekly Exports is true: Set Export Flags and Export all Plan Versions
- If Batch Uses RDX is true: Import Hierarchies
- Load Hierarchies
- If Batch Uses RDX is true: Import Actuals
- Load Actuals Data and Admin Data
- Run Batch: Set Dimension Attributes
- Run Batch Calc: Weekly Batch Calc
- If Batch Uses RDX is true: Import Forecasts
- If Batch Uses RDX is false: Load Forecasts

- Refresh All Workbooks
- Rebuild Dashboard and Plan Admin Template

Load Hierarchies (load_hier)

This task is used to load the hierarchy files listed below. Before loading the hierarchy file, the hierarchy file needs to be uploaded into Object Storage. Only if the hierarchy file is available it will load, otherwise, it will skip loading that hierarchy file. It is configured to load all the hierarchy files listed below with the purge age as zero, but it can be configured to change the purge age in the batch_exec_list.txt control file. If RAP integration (Batch Uses RDX) is enabled, it will only load the hierarchies which are not interfaced using RAP integration, otherwise, it will try to load all available hierarchy files.

This task automatically always runs as part of the weekly batch.

Following is the list of hierarchies that are loaded, if available, to be reloaded.

If Batch Uses RDX is not enabled:

- Calendar (clnd)
- Product (prod)
- Location (loc)
- Currency (curh)
- VAT (vath)
- Location Attributes (satr)
- Level (lvh)
- Custom Messages (cmsh)

If Batch Uses RDX is enabled:

- VAT (vath)
- Location Attributes (satr)
- Level (lvh)
- Custom Messages (cmsh)

For details about hierarchies, see the *Oracle Retail Merchandise Financial Planning Implementation Guide*.

Export All Approved Plans (export_all)

This task is used to export all submitted and approved plan versions (all non-working plan versions). This task first runs the export set flag task and then exports all the plan versions. This task also runs as part of the daily or weekly batch, so the user needs to run this task only if they need to re-export all plan data on an on-need basis. The exported data is used in reports, customer's data marts, and query programs.

Following is the list of export plan versions that are exported for both MFP Retail Cloud Service and MFP Cost Cloud Service:

- Merch Plan - Current Plan
- Merch Plan - Original Plan
- Merch Plan - Submitted Plan

- Merch Target - Target Plan
- Location Plan - Current Plan
- Location Plan - Original Plan
- Location Target - Target Plan

For details on the versions for export, the list of measures exported in each file, and the file name and format details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Export All Working Plans (export_wp)

This task is used to export all the working plan versions. This task first runs the export set flags task and then exports all working plan versions. This task only needs to be run if the user wants an export of all working plan versions for any reporting needs.

Following is the list of export plan versions that are exported for both MFP Retail Cloud Service and MFP Cost Cloud Service:

- Merch Plan - Current Plan
- Merch Plan - Original Plan
- Merch Plan - Submitted Plan
- Merch Target - Target Plan
- Location Plan - Current Plan
- Location Plan - Original Plan
- Location Target - Target Plan

For details on the versions for export, the list of measures exported in each file, and the file name and format details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Exports to Shared Services (export_ss)

This export set is used to export all approved Merch Plans and Location Plans for the planned periods to Assortment Planning Cloud Service. It exports the required measure files to the Object Storage location. If the customer is using Assortment Planning Cloud Service 19.x versions, the customer can use this file to import those plans.

For details about integration with Assortment Planning Cloud Service, the list of measures exported in each file, and the file name and format details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Post Build Batch (postbuild)

This task is available as an option to be called as part of the initial domain build, to load and process all loaded initial data after the initial domain build. If not called during the domain build time, this task can be run after the domain build using this OAT task.

Post Build Hierarchy (post_hier)

This task is available as an option to be called as part of the initial domain build. It enables the RDX Boolean and also tries to import/load the hierarchies. The customer can also trigger this task from OAT, if they missed enabling the RDX as part of the domain build process to only load/import the available hierarchies.

Post Patch Batch (postpatch)

This task is available as an option that executes any necessary batch process after the scheduled patches and which can be used to load hierarchy or data files as part of the patch changes. It also rebuilds all segments to include the patch changes. It runs as part of the patch upgrade, but the customer has the option to disable this task to run as part of post batch. The customer can also run it manually if they need to rerun that step from OAT.

Export for Egress (exp_egr)

This task is available mainly only for Egress customers who migrated from previous releases not using RAP and who are loading their hierarchies and actuals only using flat files. They can use this task to export the base hierarchies (Product, Location, and Calendar) and aggregated actuals from PDS to RDX, so that AI Foundation can get the hierarchy and actuals details to generate the required forecast.

Export Plans to RI (exp_plan_ri)

This task is used to export all approved Plans for the planned periods to Oracle Retail Insights (RI) Cloud Service Suite. This can only be scheduled if the retailer has Oracle Retail Insights (RI) and is using RAP integration.

This task calls the interfaces which directly transfers the MFP plan data to RI staging tables that can be directly consumed by RI.

Following is the list of plan versions that are exported:

- Merch Plan (CP and OP Version)
- Merch Target Plan (Tgt Version)
- Location Plan (CP and OP Version)
- Location Target Plan (Tgt Version)

For more details about this integration with RI and the list of measures exported for each plan, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*. This task will execute as part of the daily and weekly batch either if it is executed using the JOS/POM scheduler or the daily/weekly batch task is executed directly using OAT.

Set Dimension Attributes (batch_datr)

MFPCS supports the use of location attributes. In order to use the location attributes filter capabilities from the UI, the location attributes need to be registered as dimension attributes. This process registers the loaded location attributes as dimension attributes. Whenever a new set of location attributes is loaded, this task needs to be scheduled. This task runs as part of the Weekly Batch and needs to be scheduled only if a new set of location attributes is loaded in the middle of the week.

Import Hierarchies (imp_hier)

This task is used to schedule and run all the importer interfaces which import hierarchy data needed for MFPCS from RAP Integration. If the RDX Enabled flag is set, it runs as part of weekly batch and as part of JOS/POM schedule. This task can be used to directly execute these interfaces which pull the hierarchy data from RDX into MFP.

Following is the list of hierarchies which are imported from RDX:

- Calendar Hierarchy (W_PDS_CALENDAR_D)
- Product Hierarchy (W_PDS_PRODUCT_D)
- Location Hierarchy (W_PDS_ORGANIZATION_D)
- Currency Hierarchy (VW_CURR_HIER)
- Location Attribute Hierarchy (VW_SATR_HIER)

For more details about the interfaces and their mapping details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Import Actuals (imp_data)

This task is used to schedule and run all the importer interfaces which import actuals data needed for MFPCS from RAP integration. If the RDX Enabled flag is set, it runs as part of weekly batch and as part of JOS/POM schedule. This task can be used to directly execute this interface which pulls the fact/measures data from RDX into MFP.

Following is the list of interfaces which are imported from RDX:

- Sales (W_PDS_SLS_IT_LC_WK_A)
- Inventory (W_PDS_INV_IT_LC_WK_A)
- Inventory Adjustments (W_PDS_INVADJ_IT_LC_WK_A)
- On-Order (W_PDS_PO_ONORD_IT_LC_WK_A)
- Receipts (W_PDS_INVRC_IT_LC_WK_A)
- Markdowns (W_PDS_MKDN_IT_LC_WK_A)
- Transfers (W_PDS_INVTSF_IT_LC_WK_A)
- Wholesale/Franchise (W_PDS_SLSWF_IT_LC_WK_A)
- Deal Incomes (W_PDS_DEALINC_IT_LC_WK_A)
- Currency Conversion Rates (W_PDS_EXCH_RATE_G)
- Location Data (VW_LOC_DATA)
- Location Attributes (W_PDS_ORG_ATTR_STR_D)

For more details about the interfaces and their mapping details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

Import Forecasts (imp_fcst)

This task is used to schedule and run all the importer interfaces which import forecast data from AI Foundation using RAP Integration using RDX. If the RDX Enabled flag is set, it runs as part of the weekly batch and as part of JOS/POM schedule. This task can be used to directly execute the interfaces which pull the fact/measures data from AI Foundation using RDX into MFP.

Following is the list of interfaces which are imported from RDX:

- Forecast from AI Foundation (RSE_FCST_DEMAND_EXP)

For more details about the interfaces and their mapping details, see the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.

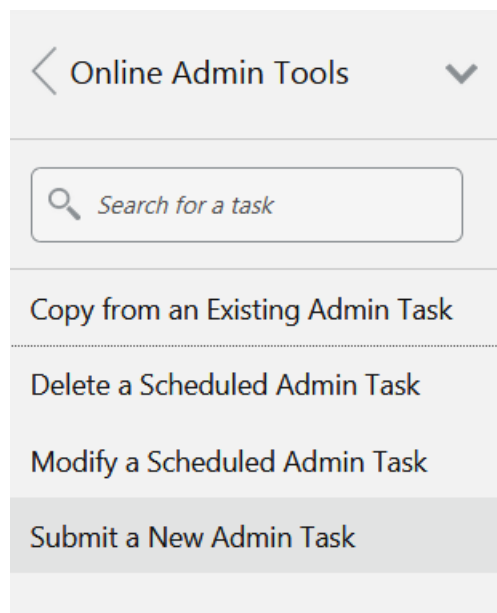
Scheduling Configured Batch Administration Tasks

This section walks through an example of the process for scheduling and monitoring the Configured Batch Administration task named Run Batch Measure Export Group. The steps for scheduling all other tasks are similar, and most of the tasks do not have additional input parameters specific to that task. For more details about scheduling and monitoring online administration tasks, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

To schedule and monitor a Configured Batch Administration task:

1. Log in to the MFP Cloud Service (mfpcs) application as an Administration user.
2. In the Tasks list, select Admin Tasks for MFP CS Customer Domain and then select Online Admin Tools. Click **Submit a New Admin Task**.

Figure 1-1 Administration Tasks



3. Select the Configured Batch Tasks for the Task Group and click **Next**.

Figure 1-2 Select Task Group Window

The screenshot shows a window titled "Submit a New Admin Task" with a close button (X) in the top right corner. Below the title bar, the text "Select Task Group" is displayed. There are six radio button options listed vertically: "Configured Batch Tasks" (which is selected), "PDS Admin Tasks", "System Admin Tasks", "SR Admin Tasks", "Bootstrap Tasks", and "Patch Application Task". At the bottom right of the window, there are three buttons: "Cancel", "Next >", and "Finish".

4. In the task list, select Run Measure Export Group and click **Next**.

Figure 1-3 Select Task Workbook Wizard Window

The screenshot shows the same "Submit a New Admin Task" window, but now at the "Select A Task From Configured Batch Tasks Group" step. The window contains a list box with the following items: "Run Batch Task Group", "Run Batch Calc Group", "Run Batch Measure Load Group", "Run Batch Measure Export Group", and "Translation Tasks". The "Run Batch Measure Export Group" item is highlighted. At the bottom right, there are four buttons: "Cancel", "< Previous", "Next >", and "Finish".

5. Enter the Task Label. This task has an additional parameter to choose the export measure group. In following figure, as an example, Merch Plan - Current Plan is selected. Click **Next**.

Figure 1-4 Select Export Measure Group

The dialog box titled "Submit a New Admin Task" has a close button (X) in the top right corner. Below the title bar, it says "Specify the arguments for task:". There are three input fields: "Task Label" with the text "Exporting Data", "Batch Export Measure Group" with a dropdown menu showing "Merch Plan - Current Plan", and "Log level" with a dropdown menu. At the bottom right, there are four buttons: "Cancel", "< Previous", "Next >", and "Finish".

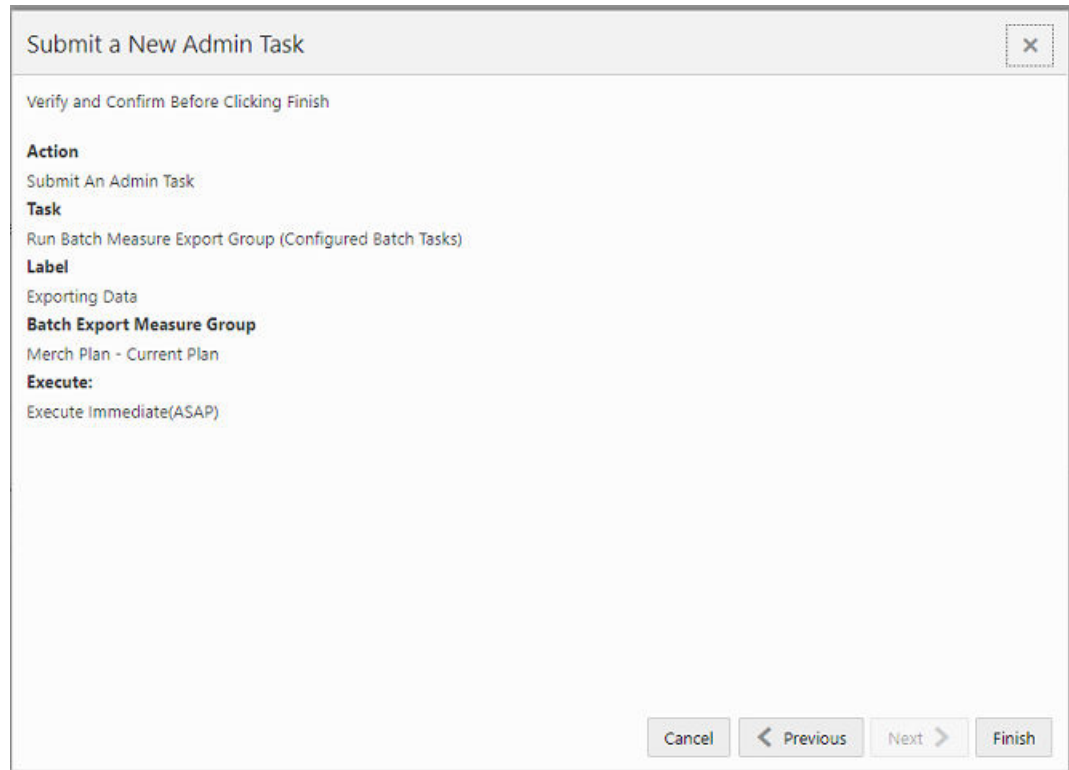
6. To schedule the task to run immediately, select **Run ASAP** and click **Next**. To run on a particular date and time, select **Run on a Schedule** (One time / Hourly / Daily / Weekly / Monthly). Provide the Server Start / Stop Date/Time and click **Next**.

Figure 1-5 Schedule Task Workbook Wizard Window

The dialog box titled "Submit a New Admin Task" has a close button (X) in the top right corner. Below the title bar, it says "Schedule Task". There are two radio buttons: "Run ASAP" (selected) and "Run on a schedule". Below "Run on a schedule" is a dropdown menu showing "One time". Below that is a text field for "Server Start Date/Time:" with the value "12/27/18 12:32 AM" and a calendar icon. At the bottom right, there are four buttons: "Cancel", "< Previous", "Next >", and "Finish".

7. In the Confirm Action window, review the task scheduling details. To confirm the scheduling and submit the task, click **Finish**.

Figure 1-6 Confirm Action Window



Submit a New Admin Task

Verify and Confirm Before Clicking Finish

Action
Submit An Admin Task

Task
Run Batch Measure Export Group (Configured Batch Tasks)

Label
Exporting Data

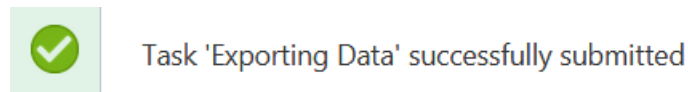
Batch Export Measure Group
Merch Plan - Current Plan

Execute:
Execute Immediate(ASAP)

Cancel < Previous Next > Finish

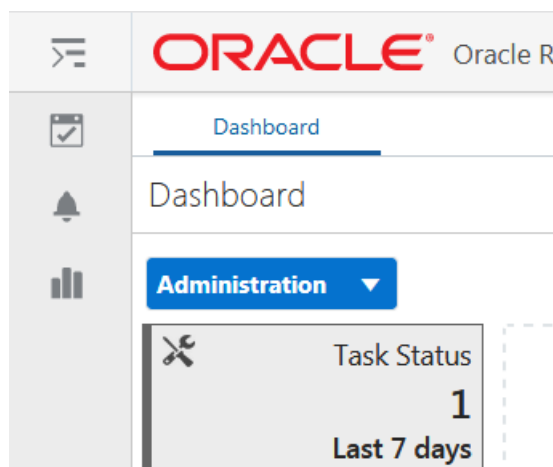
The task submitted confirmation message appears.

Figure 1-7 Task Submitted Confirmation Message



8. To check the status of all submitted tasks in the Dashboard, click **Dashboard** and select **Administration** from the list of Dashboard Profiles in the dropdown.

Figure 1-8 Location of Administration Dashboard Selection



At the bottom of the dashboard, it contains the lists of tasks submitted and their status.

Figure 1-9 List of Submitted Tasks

Description	Status	Task Type	Submitted by	Started/Scheduled	Completed	Record Status
Run Daily Batch	In Progress	Run Batch Task Group	ocladmin	7/14/20 4:02:24 PM		---
Run Batch Task Group	Success	Run Batch Task Group	ocladmin	7/14/20 4:14:06 PM	7/14/20 4:20:47 PM	N/A
Dashboard for ocladmin	Success	Auto dashboard build	ocladmin	7/14/20 10:23:55 AM	7/14/20 10:24:13 AM	N/A

The Status column shows whether a job has completed successfully, failed, or is pending (Scheduled). For any completed (Success/Failed) tasks, click the job name to view the subtask details if any for that job. To view the log, select the task and click Download Log. For failed tasks, the logs show the error details.

Following is an example of a log showing an error:

```
Service 'loadHier' failed with return code 2

03:13:24 : INFORMATION : eebatch_loadhier.ksh[116] - _call of command 'xpsce_run loadHier
-d /u07/projects/mfp/domains/mfprcs -load clnd -checkParents -purgeAge 14 -purgeBackups
-forceInputRollups -forceNAConsistency -maxProcesses 8 -loglevel all' complete
03:13:24 : ERROR : eebatch_loadhier.ksh[122] - Error Result from loadHier call.
03:13:24 : INFORMATION : eebatch_loadhier.ksh[122] - Exiting script with code: 102
03:13:24 : INFORMATION : eebatch_loadhier.ksh[1] - NO_EXIT_STATEMENT
```

Following is an example of a log showing the cause of an error:

```
<E 2018Apr23 03:13:14.426> loadHier (clnd) failed on domain: mfprcs
<E 2018Apr23 03:13:14.426> ReindexDomain must be run first to prepend CLND Dimensions.
<E 2018Apr23 03:13:14.426> Syntax: reindexDomain -d <domainPath> -hier CLND -prepend
<E 2018Apr23 03:13:14.426> LoadHier must be run again after reindexing the domain.
```

Note

The detailed log file will also be uploaded to Object Storage so the customer can download. The log file names are first appended with `planning/outgoing/logs/` and with the text `success/failure` (with error code) along with the process name and control file entry set names and the time stamp for easy identification. For example:

```
/planning/outgoing/logs/success.eebatch_calc.exp_set.20190614124917.tar.gz
```

```
/planning/outgoing/logs/failure.13.eebatch_exec.setup.20190614043009.tar.gz
```

Dashboard

The Dashboard provides pre-configured dashboard profiles to the user once logged into the application. There are six profiles pre-configured for MFPCS:

1. Administration - task status
2. MFP: In-Season
3. MFP: Pre-Season
4. MT: Exceptions
5. MP: Exceptions
6. LP: Exceptions

For more information about the usage of Dashboards in MFPCS, see the *Oracle Retail Merchandise Financial Planning Cost Cloud Service User Guide* and *Oracle Retail Merchandise Financial Planning Retail Cloud Service User Guide*.

The dashboard pulls the data from an admin workbook built from the Online Administration Tools. In order to view the dashboard, an Administrator must schedule the dashboard builds from the System Admin Tasks.

Figure 1-10 Schedule Dashboard Build Task

Submit a New Admin Task

Select A Task From System Admin Tasks Group

- Load hierarchy Data
- Load Measure Data
- Manage Dimensions
- Manage Hierarchies
- Manage Informal Positions
- Manage Users
- Manage Workspaces
- Measure Information
- Optimize Domain
- Purge tasks from online admin dashboard
- Reindex Domain
- Rename Positions
- Scan Domain
- Schedule Dashboard Build**
- Segment/Workspace Batch Operation
- View and Manage Domain Properties

Cancel < Previous Next > Finish

Figure 1-11 Specify Arguments for Schedule Dashboard Build Task

Submit a New Admin Task

Specify the arguments for task:

Task Label

☐ Override RPAS_TODAY? Uncheck to default system setting

Range dimension

Year

Pre-Season Range

1

Post-Season Range

1

☐ Delete and Recreate Dashboard Segment? (Warning : Use this option only if dashboard template styles are patched. Dashboard will loose all user formatting if we delete and recreate segment.)

For

☒ All users

☐ Group

Administrator

Cancel < Previous Next > Finish

- Task Label - Enter the name of the build task to review the status of build.
- Select Override RPAS_TODAY - Check box and then select a date, if you need to build the dashboard as of a day other than the current date.
- Range dimension - Calendar dimension against which the dashboard will be pre-ranged.
- Pre-Season Range - Number of periods of the Range dimension that need to be included before the Current period Range. Current Period Range will be always included.
- Post-Season Range - Number of periods of the Range dimension that need to be included after RPAS_TODAY.
- Select Delete and Recreate Dashboard Segment check box, only if there are any changes to the dashboard template selection after patching.
- Users - Select All Users, Group, or Users that can access that dashboard.

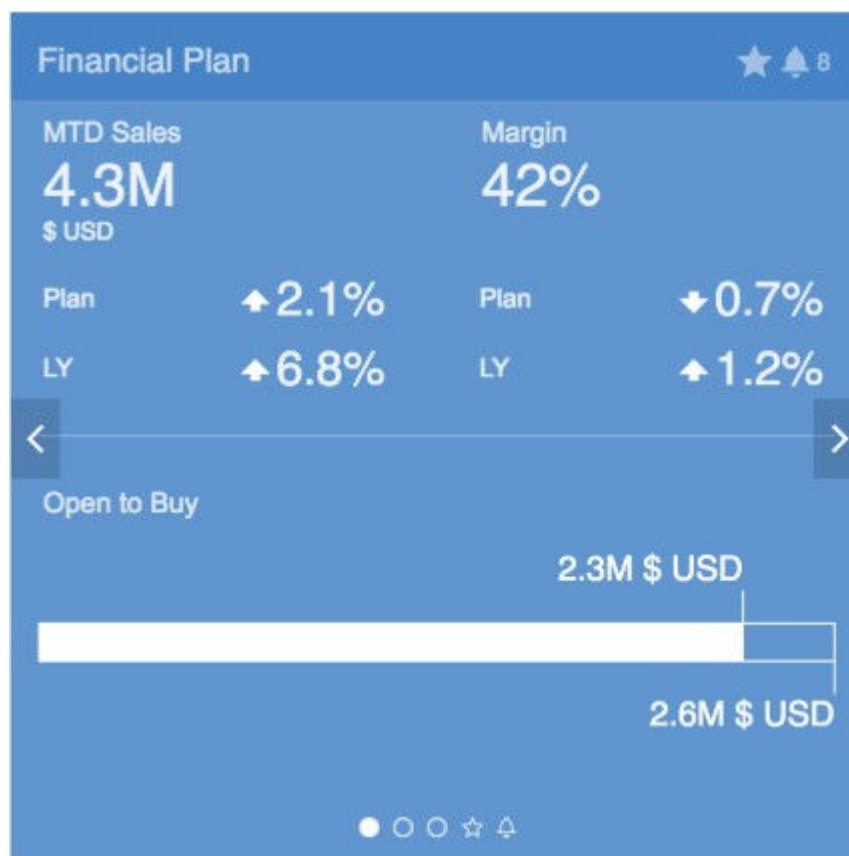
Note

For the pre-configured GA dashboard profiles, the preferred selections for Range dimension: Half, Pre-Season Range: 1, and Post-Season Range: 1.

Retail Home

If Retail Home is configured, it provides a dashboard view of key configured metrics as tiles across multiple applications in the enterprise. MFPCS has the following tile views configured for Retail Home. The metrics are configured in the same dashboard templates, so the regular dashboard segment first should be built first, in order to see the tiles from Retail Home. Retail Home uses a different set of JSON files to get the data from the dashboard segments into these tiles. For template versions, after the domain is configured, the customer needs to seed the retail home JSON file once after Retail Home is configured. For more details about how to seed Retail Home JSON files, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Figure 1-12 MFPCS Tile View for Retail Home



Metrics shown in the above figure:

- Month-to-Date Sales (MTD)
- MTD Sales to Plan (OP)
- MTD Sales variance to LY
- MTD Margin %
- MTD Margin variance to Plan (OP)
- MTD Margin variance to LY

- Open to Buy bullet chart: total is Open to Buy + Net On Order

Figure 1-13 MFPCS Tile View for Retail Home



Metrics shown in the above figure:

- Year-to-Date Sales (YTD)
- YTD Margin %
- YTD Sales variance to Plan (OP)
- YTD Returns
- Line Chart: YTD Sales variance to Plan with X-axis as Month

2

Build/Patch Application

This chapter describes the process to build or patch a domain.

Build the MFP Cloud Application from the Bootstrap Domain

This section describes the process of installing MFP Cloud Service from the bootstrap domain with retailer data and generated configuration for the plug-in options. Once RPASCE and MFP Cloud Service are installed in the Oracle Cloud environment, the Administrator will have the option to overwrite and install the domain with GA data or with retailer data. The Administrator also has the option to set the deploy status of application as template or non-template (custom).

Bootstrap Environment

A newly provisioned MFPCS environment is set up with a bootstrap configuration that allows the Administrator to log and access the Online Administration Tools (OAT) interface before the domain has been built. The bootstrap OAT configuration allows only tasks required to deploy an application. Once the domain has been constructed, the domain task and the bootstrap activities will both be available. This allows the domain to be rebuilt from scratch multiple times if needed.

Before building the domain, upload the following files for building/patching to Object Storage using the File Transfer Service. Except for the input hierarchy and data files, the other files are not needed if the customer is planning to use the template GA without any extensibility.

- Configuration file as mfpcs_config.zip with prefix incoming/config.
- Interface Configuration file interface.cfg with prefix incoming/config
- Dashboard JSON file dashboardSettings.json with prefix incoming/config
- Service Config JSON file serviceConfig.json with prefix incoming/config
- Batch control files as batch_control.zip or individual files with prefix incoming/batch_control
- Input hierarchy and data files with prefix incoming/input

Note

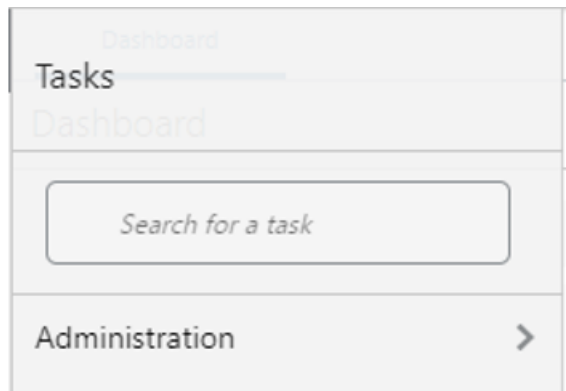
If it is non-template, the customer is advised to use the same configuration name as GA and the hierarchy and its dimension names aligning with the GA solution for matching dimensions to allow them to move to GA later with minimal changes and to also enable them to integrate with other planning applications in the future. Though the non-template customer is allowed to use their own configuration name and other dimension names, it will not be easy to integrate with other planning applications.

Build Application from the Bootstrap Domain

The following steps take you through the process of building a customer domain for MFP Cloud Service using the bootstrap domain:

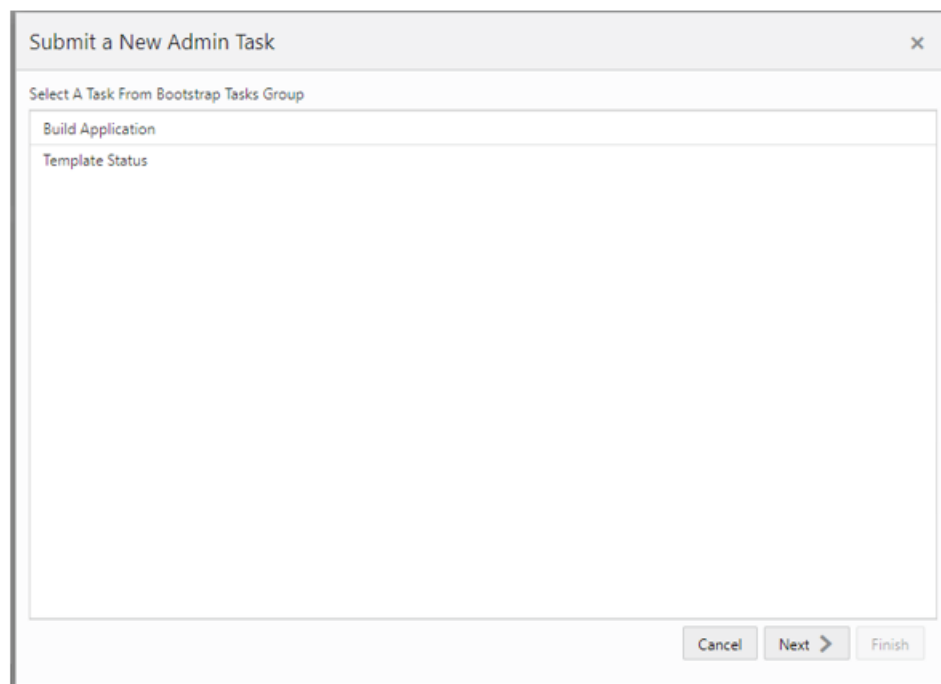
1. After provisioning MFP Cloud Service, log in to the bootstrap domain as an Administration user.
2. In the Tasks list, select Administration and then Online Admin Tools. Click **Submit a New Admin Task**.

Figure 2-1 Admin Tasks for RPASCE Bootstrap Task



3. Select the Build Application task and click **Next**.

Figure 2-2 Select Build Application Task



4. Set the arguments for the task:

Figure 2-3 Select Build MFP Cloud Service Domain Task Arguments

The screenshot shows a dialog box titled "Submit a New Admin Task" with a close button (X) in the top right corner. The main area is labeled "Specify the arguments for task:" and contains the following fields and options:

- Task Label:** A text input field containing "Build Application".
- Partition Dimension:** A text input field containing "dept".
- Use GA Configuration with no extensibility?:** A checked checkbox.
- Use GA data?:** A checked checkbox.
- JSE Jar files (optional, comma-separated list):** An empty text input field.
- Overwrite Existing Application?:** An unchecked checkbox.
- Set RPAS_TODAY in application:** A text input field containing "20230101".
- Batch Task Group to run after Application Build:** A text input field containing "postbuild".

At the bottom right, there are four buttons: "Cancel", "< Previous", "Next >", and "Finish".

- a. Enter the Task Label.
- b. Partition Dimension is defaulted to dept dimension in the MFPCS Template version. If the customer is deploying the application as a non-template version, provide the equivalent dimension name from the product hierarchy equivalent to the level of department. The application will be internally partitioned based on this dimension to allow parallel processing of data in the batch.
- c. Select the Use GA Configuration with no extensibility check box, only if you need to deploy the pure template configuration without any changes, otherwise uncheck this box and upload the new configuration to the Object Storage. If no configuration is found in Object Storage, the deploy job will fail.
- d. Select the Use GA data option only if the customer wants to deploy the application using the GA data set readily available for the application. If the customer wants to deploy and use their own data set, upload the files to Object Storage.
- e. Specify the JSE Jar files names if the customer is planning to use new special expressions within the configuration and the JAR file names containing those expressions to be registered. If the customer is providing these file names, they should also upload the JAR files to Object Storage.
- f. If the application was already created and needs to be overwritten, select the Overwrite Existing Application option; otherwise, do not select this option. Selecting this option will drop the existing application and all associated meta data stored, so it will also lose connection to the environment. The customer will need to log out and log in again to view the status of the deploy.
- g. RPAS_TODAY is an optional parameter. It is needed only if the customer is planning to use the GA data set. For MFP GA data, the preferred RPAS_TODAY date is 20230101.

- h. Select the Batch Task Group to run after Application Build. This is an optional parameter and if the template and GA dataset are used, the batch task to run is postbuild.
- If it is a template and non-GA dataset, the customer can either use set_rdx to enable RDX, or run post_hier to enable it and load/import hierarchy files. Or the customer can run postbuild_rdx to enable RDX and then run the postbuild with the customer data.
- If it is a non-template deploy, the customer can provide the batch task name that they want to run after the application build.
- Application Deploy without any batch will not load any hierarchy or data into the application, so the customer may need to run tasks to load hierarchy and data after domain build if they are not providing any task to run during the Application Build.
5. Select the time to schedule the task and click **Next**. Click Run ASAP if the Administrator wants to run the task now or the task can be scheduled by selecting the Run on a Schedule option.

Figure 2-4 Schedule Task

Submit a New Admin Task

Schedule Task

☒ Run ASAP

☐ Run on a schedule

One time

Server Start Date/Time:

12/27/18 12:53 AM

Cancel < Previous Next > Finish

6. Review the selections and click **Finish**.

Figure 2-5 Verify and Confirm Selections

The screenshot shows a dialog box titled "Submit a New Admin Task" with a close button (X) in the top right corner. Below the title bar, the text "Verify and Confirm Before Clicking Finish" is displayed. The configuration details are as follows:

- Action:** Submit An Admin Task
- Task:** Build Application (Bootstrap Tasks)
- Description:** Build Application from Config
- Label:** Build Application
- Partition Dimension:** dept
- Use GA Configuration with no extensibility?:** Use GA data?
- Set RPAS_TODAY in application:** 20230101
- Batch Task Group to run after Application Build:** postbuild
- Execute:** Execute Immediate(ASAP)

At the bottom right of the dialog, there are three buttons: "Cancel", "< Previous", and "Finish".

7. After submitting, review the status of that task in the dashboard similar to any other standard administration tasks.
8. After the task is successfully completed, log out and log in to the application to view the additional tasks specific to the newly built domain.

Note

Users will not be allowed in the application while building and patching the domain.

Patching the Application

This section describes the process of patching the MFP Cloud Service application using the Online Administration Tools. Once the RPASCE and MFP Cloud Service upgrade patches are installed in the Oracle Cloud environment, the MFP application will be patched by default with the latest configuration if the application type is template with the last used plug-in options or use the last used extensible configuration, if it was uploaded by the customer. However, if the customer wants to reapply the patch with changes to the plug-in option, use an updated extensible configuration, or if the customer version is non-template, then the customer can use this task to patch the application. For the template version, at the end of the patch it also runs the Post Patch Batch task which runs the required batch task to support the patch process. It also rebuilds all the workbooks to include the changes of the patch.

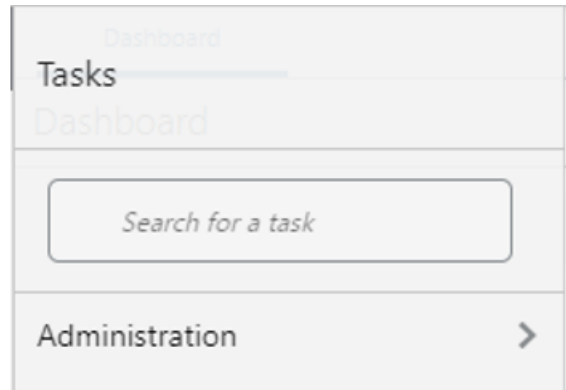
Before scheduling this task, the Administrator should ensure that no users are logged in to the application while patching the solution. The customer also should upload the configuration if the customer is not using the template version or if using the template version but using

extensibility. If the customer has not uploaded any configuration, it will try to use the last used configuration during the application build or the one used during the last patching.

The following steps walk you through the process to patch the MFP Cloud Service application as an Administration user:

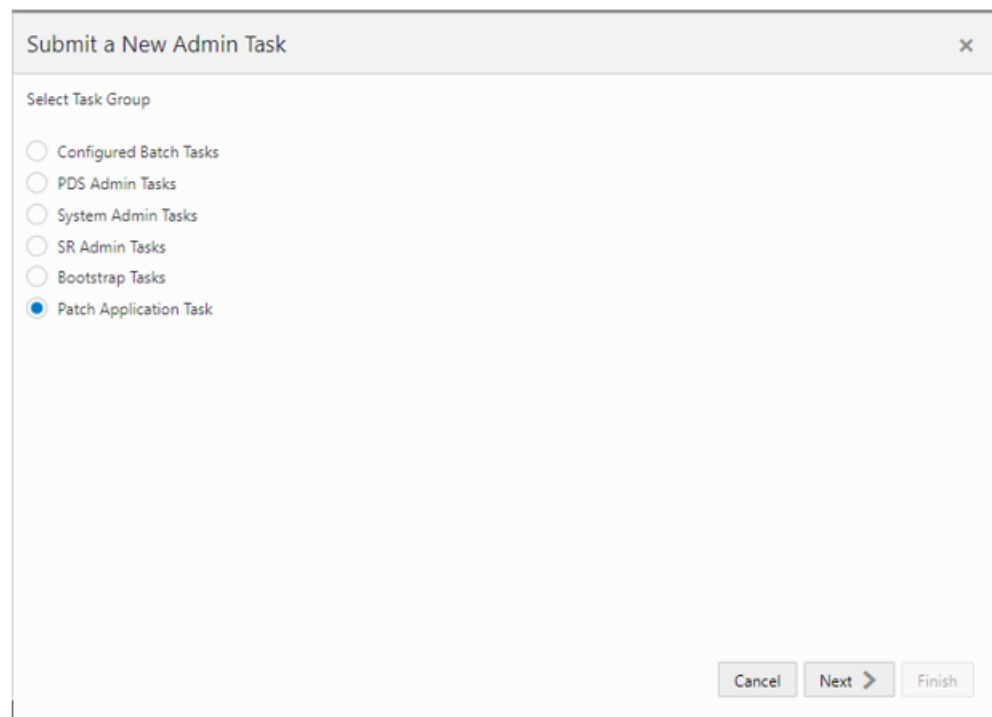
1. After deploying MFP Cloud Service, log in to the application as an Administration user.
2. In the Tasks list, select Administration and then Online Admin Tools. Click **Submit a New Admin Task**.

Figure 2-6 Admin Tasks for RPASCE Bootstrap Task



3. Select the Patch Application Task and then click **Next**. Then select Patch Application in the available list of tasks.

Figure 2-7 Select Patch Application Task



4. Set the arguments for the task:

Figure 2-8 Select Patch Application Task Arguments

Submit a New Admin Task

Specify the arguments for task:

Task Label
Patch Application

Offline Mode Message

Register new JSE Jar files (optional, comma-separated list)

Log level

Cancel < Previous Next > Finish

- a. Enter the Task Label and Offline Mode Message.
 - b. Specify if any new JAR files that need to be registered for any changes to the application configuration as part of the Patching process. The customer should also upload any new JAR files containing that special expression.
 - c. After choosing all the necessary options and Log level, click **Next**.
5. Select the time to schedule the task and click **Next**. Click Run ASAP if the administrator wants to run the task now or the task can be scheduled by selecting the Run on a Schedule option.

Figure 2-9 Schedule Task

The screenshot shows a dialog box titled "Submit a New Admin Task" with a close button (X) in the top right corner. The "Schedule Task" section is active. It contains two radio buttons: "Run ASAP" (selected) and "Run on a schedule". Below the "Run on a schedule" option is a dropdown menu currently set to "One time". Further down, the "Server Start Date/Time:" is displayed as "12/27/18 12:57 AM" next to a calendar icon. At the bottom right, there are four buttons: "Cancel", "< Previous", "Next >", and "Finish".

6. Review the selections and click **Finish**.

Figure 2-10 Verify and Confirm Selections

The screenshot shows the same dialog box, but now the "Verify and Confirm Before Clicking Finish" tab is selected. It displays a summary of the task configuration: "Action: Submit An Admin Task", "Task: Patch Application (Patch Application Task)", "Description: Patch Application by applying updated Configuration", "Label: Patch Application", "Offline Mode Message: Patch Application", "Log level: All", and "Execute: Execute Immediate(ASAP)". At the bottom right, there are three buttons: "Cancel", "< Previous", and "Finish".

7. After submitting, review the status of that task in the dashboard similar to any other standard administration tasks.

Template Status

The MFPCS application when provisioned will be deployed as a Template application with the Template status of Activated. The customer has the option to deactivate the template status meaning it is a fully custom configuration. If it is a custom configuration, the customer should upload and completely maintain the configuration. Regular upgrades or patches will not patch the application and only upgrade the server version.

The following task can be used to activate/deactivate the template status of the application. It is advisable for the customer to decide on the template status before the application is built for the first time. Later, it may be easier to convert from the template to the non-template version without any limitations. But it will not be easy to move from a non-template version to template, if the configuration does not follow the extensibility rules for the template version of MFP Configuration. See the *Oracle Retail Merchandise Financial Planning Implementation Guide* for extensibility guidelines for the MFP template version; only if the non-template application follows those guidelines can it be converted to template.

The Template Status changing task is available as a Bootstrap task together with Build Application. In the Change template status drop down, select the Activate or Deactivate option to toggle the template status option and submit the task to change the template status. Activate means it is a template. Deactivate means it is a custom (non-template).

The customer can also use the same task and choose List template status to view the current template status of the deployed application.

Figure 2-11 Template Status

Submit a New Admin Task

Specify the arguments for task:

Task Label
Template Status

☐ List template status

Change template status
Activate
Deactivate

Cancel < Previous Next > Finish

3

User and Role Maintenance

This chapter describes the process for managing users and roles. The Administrator can create users and assign the level of access as needed. This chapter describes how to create/modify/delete a user and assign roles to a user.

Your Merchandise Financial Planning Cloud Service is configured with Oracle Cloud Infrastructure Identity and Access Management (OCI IAM) for managing users and access.

In order to provide application access to end users, the Cloud Service Administrator needs to create the user's account from OCI IAM. For OCI IAM user setup, follow the steps in [OCI IAM User Creation](#). The user must also be assigned to a group in OCI IAM.

To complete the user provisioning activity, the same user must be added in the Merchandise Financial Planning Cloud Service application and assigned to the same user group.

MFP Cloud Service is built with role-based access. For information on the available roles, see the *Retail Identity Management for OCI IAM* document at <https://docs.oracle.com/en/industries/retail/retail-identity-management/latest/books.html>.

For detailed information on the tasks related to user and role, see the following sections:

- [User Maintenance through OCI IAM](#)
 - [OCI IAM User Creation](#)
 - [Managing Users in OCI IAM](#)
- [Bulk Loading of User and User Groups](#)

For Cloud Service provisions, the customer needs to define required roles as needed for their configuration using OCI IAM. For more details about Atomic User Management (AUM), additional roles available, and access to security details, see the *Oracle Retail Predictive Application Server and Applications Cloud Edition Security Guide*.

User Maintenance through OCI IAM

This section describes how to maintain users through Oracle Cloud Infrastructure Identity and Access Management (OCI IAM).

OCI IAM User Creation

Before users can access the Oracle Retail Merchandise Financial Planning Cloud Service applications, it is necessary to provision access to the system for each user and to assign roles to each user to control what functionality will be available to the user. The access provisioning can be done using OCI IAM. After creation of the user in OCI IAM, the Administrator needs to create the same user with the same user group (that is, the role in OCI IAM) in the Oracle Retail Merchandise Financial Planning Cloud Service application.

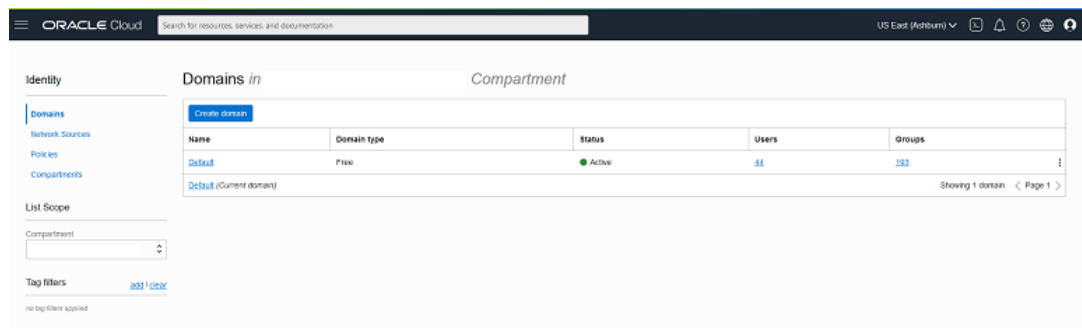
Note

The OCI IAM Application URL and login with the required administrator access are needed to perform the following steps. The welcome email sent by Oracle includes the URL.

The following steps explain how to define users and assign roles for a new user:

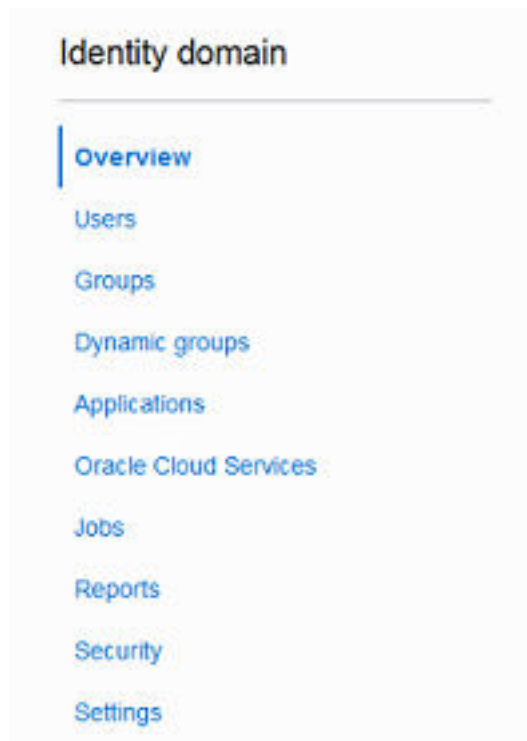
1. Log in to the OCI IAM application. The Domains view is shown by default.

Figure 3-1 OCI IAM Domains



2. Click the Domain name for which you want to create a user. The Domain Overview page appears.
3. From the Domains Overview page, click Users.

Figure 3-2 Domains Overview Menu



- From the Domain Users page, click Create User. The Create User page appears.

Figure 3-3 Create User

Create user

First name: Optional

Last name

Username / Email

☒ Use the email address as the username

Groups: Optional

Select groups to assign this user to.

Search

☐	Name	Description
☐	DATA_SCIENCE_ORCL_ADMIN_JOB	Data Science Cloud Administration permission for Retailer using Innovation Workbench using APEX Workspace
☐	RETAIL_ASYNC_TASK_JOB	A systemic role for executing async jobs
☐	FORECAST_ANALYST_JOB	Reviews and approves forecasts on a day to day basis. An advanced forecast analyst may also be responsible for forecast parameter maintenance and demand modeling activities
☐	PRICING_MANAGER_JOB	The Pricing Manager typically works as part of the buying group for one or more departments. Besides all of the typical management duties involved with having direct reports the Pricing Manager has the responsibility of making sure the company objectives are reflected in the pricing policies implemented by the Pricing Analyst.

Create Cancel

- Provide the First Name, Last Name, and unique user name. If the Use the email address as the user name option is checked, the system automatically takes the email address as the user name.

Note

Oracle recommends using the email address as the user name.

- Assign the user to a group. Typically, this will be the group specific to the provisioned service or application. The user can be assigned to more than one user group, but it is recommended to assign one group to one user.
- Click **Create** to complete the user creation in OCI IAM.

Adding a User Group

User groups provide an intermediate level of security to workbooks that were created and saved by specific users. When new users are assigned to the system, they must be assigned to existing user groups. User groups should consist of individuals with similar job functions or responsibilities. In the Oracle Retail Predictive Planning Suite, the user group corresponds to the user's planning role.

To add a user group:

- Under User Administration, click **Add User Group**. A Workbook Wizard window appears.
- In the Workbook Wizard window, enter the relevant information into the following fields:

- In the Group Name field, enter a name for the group.

Note

Each group name must begin with a letter and contain only alphanumeric characters and underscores. It cannot have spaces. User group names are case sensitive.

- In the Group Label field, enter a descriptive label for the group. This label is displayed when referring to the group throughout RPASCE.
3. Click **Finish** to add the user group to the database.

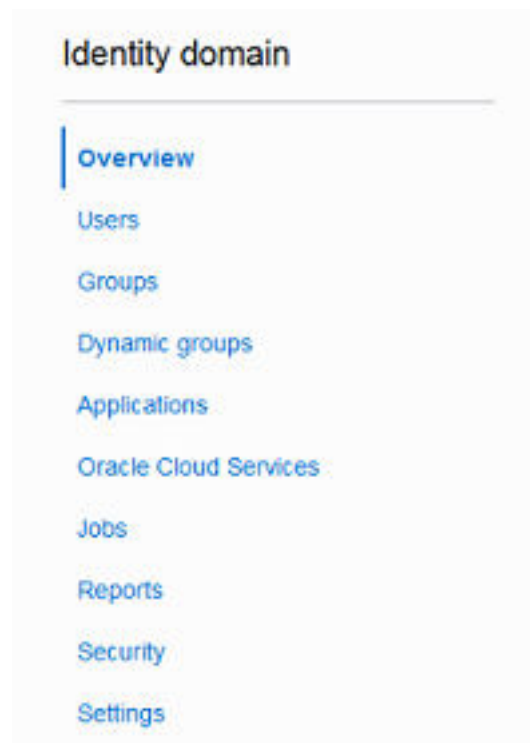
Managing Users in OCI IAM

After users are created in OCI IAM, the Administrator can manage user information, manage user groups assigned to users, delete or revoke user access, and reset a password.

The following steps explain how to manage users in OCI IAM:

1. Log in to the OCI IAM application. The Domains view is shown by default.
2. Click the Domain name for which you want to create a user. The Domain Overview page appears.
3. From the Domains Overview page, click Users.

Figure 3-4 Domains Overview Menu



4. Click the user that you want to edit.
5. You can update the additional information for the selected user. Once updated, click **Update User** to confirm the changes.

6. You can manage the user groups assigned to users in the Groups table.

Assign a New Group

- a. In the Groups table, click **Assign user to groups**.
- b. From the Assign user to group dialog, select the group or groups to add the user.
- c. Click **Assign user**.

Remove a Group

- a. In the Groups table, select the group from which you want to remove the user.
- b. Click **Remove user from group**.

Note

The same user also needs to be deleted from the Merchandise Financial Planning Cloud Service application. This will keep OCI IAM and the application synchronized. Complete the user deletion by following the steps for deleting a user in the User Maintenance chapter of the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

7. A user can be deactivated by selecting **Deactivate** from the More Actions menu and then confirming the selection in the confirmation dialog.
8. A user can be asked to reset their password by selecting **Reset Password** and then confirming the selection in the confirmation dialog. The associated user will get an email with a link to reset the password.

Bulk Loading of User and User Groups

The Administrator can bulk import user and user groups using comma-separated values (CSV) files. For information on the bulk import of user and user groups from OCI IAM, see the documentation at the following links: <https://docs.oracle.com/en-us/iaas/Content/Identity/home.htm>.