Oracle® Retail Assortment Planning Cloud Service

Administration Guide

Release 24.1.101.0

F90344-01

January 2024

ORACLE®

Primary Author: Bernadette Goodman

Contributing Authors: Venkatachalam Thiyagarajan

Contents

Send Us Your Comments

Preface

Administration Process

1   APCS Batch Task Administration

2   Build/Patch Application

3   User and Role Maintenance

Send Us Your Comments

Oracle Retail Assortment Planning Cloud Service Administration Guide, Release 24.1.101.0

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 Assortment 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.

Related Documents

For more information, see the following documents in the Oracle Retail Assortment Planning Cloud Service documentation set:

- *Oracle Retail Assortment Planning Cloud Service Implementation Guide*
- *Oracle Retail Assortment Planning Cloud Service Release Readiness Guide*
- *Oracle Retail Assortment Planning Cloud Service Starter Kit Guide*
- *Oracle Retail Assortment Planning Cloud Service User Guide*

Also, see the Oracle Retail Predictive Application Server Cloud Edition documentation set.

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.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Administration Process

The intent of this document is to guide an Assortment Planning Cloud Service (APCS) Administrator to perform the recurring administrative activities for the APCS application. This document outlines all administration activities required to support a live APCS 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 APCS Administrative activities can broadly be classified into two categories. This document follows these categories and provide details for the tasks within them.

Regular Activities:

- APCS Batch Task Administration
- Build/Patch Application

Ad-hoc Activities:

- User and Role Maintenance
- Monitor Domain Performance

Regular Activities

Once an APCS 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 APCS users to create, manage, and share their assortment plans. Internally, it also does the calculations for necessary data aggregation.

The APCS 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 APCS application.
- Remove an existing user who has left the organization and needs to be removed from the APCS environment.
- Manage a user's access when the role changes within the organization.

This document describes the necessary actions to achieve this kind of request.

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 Assortment 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)

1
APCS Batch Task Administration

The Assortment Planning Cloud Service (APCS) 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.

Assortment Planning Cloud Service uses the Oracle Retail Predictive Application Server Cloud Edition (RPASCE) Online Administration Tools as part of scheduling RPASCE utilities and scripts that must be scheduled to run batch on Cloud, as the users do not have access to directly schedule scripts or run utilities on the domain server. Administration users can view the results of the scheduled scripts/utilities log in a dashboard through the RPAS Cloud Edition.

RPASCE Online Administration Tools support the scheduling of standard RPASCE 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 APCS. 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 AP 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. For allowed changes, see the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

Administration-Specific Batch Tasks

The application-specific batch tasks are a set of tasks which help the Administrator to load/export a predefined set of measures 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. APCS uses the RPASCE 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*.

Customers using RAP integration to get the integration data should enable the Batch Uses RDX flag in the application in the client UI in Planning Administration -> Batch Setup worksheet. Based on that flag, additional steps will get executed during the batch. This flag can also be enabled as part of Domain build process.

Customers can set up some additional batch specific measures, such as Enable RMF CS Integration, Enable Daily Exports, and Enable Weekly Exports that control the batch process in the client UI in Planning Administration -> Batch Setup.

The following list shows the application-specific administration tasks that are pre-configured for AP 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 RPASCE-specific tasks. Details about the RPASCE-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 after it. 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 APCS 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 Week Mapping, Clustering Weights, and so on.

- Forecast Data (load_fcst) - To load Forecast Data.

- MFP Data (load_mfp) - To load MFP Data.

- Week Mapping (load_lymap) - To load the Week Mapping file.

- Placeholder Rename (load_phrn) - To load the Placeholder Rename files.

- Image URL Files (load_img) - To load all the Image URL files.

For details about the list of measure files that are loaded for different measure sets and file format and source information, see the *Oracle Retail Assortment 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 APCS are available to the retailer to use by any downstream applications which need APCS 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:

- Item Plan - Pre-Season (ip_ipop)

- Item Plan - In-Season (ip_ipcp)

- Item Plan - OTB (ip_otb)

- Item Base Price (as_sprc)

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 Assortment 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 APCS:

- Daily Batch Calc (calc_daily)

- Weekly Batch Calc (calc_weekly)

- Set Export Flags (exp_set)

Daily Batch Calc (calc_daily)

This batch calc set is used to run batch calculations necessary to initialize date settings and daily calculations that need to run as part of Daily Batch. It internally runs the predefined batch rule groups AD_Batch_GB, AD_Batch_Agg1, and AD_Dash_Agg1.

AD_Batch_GB presets the Weekly mappings if it is not loaded or not set by users. AD_Batch_Agg1 sets all elapsed setting measures. This process runs as part of the daily and

weekly batch, so the retailer does not have to run this process unless they change the date settings in the middle of the week.

Weekly Batch Calc (calc_weekly)

It runs all the calculations that run as part of Daily Batch Calc and in addition, it also runs rule groups AD_Batch_RMS_*, AD_Batch_WH*, and AD_Batch_Agg* which has the calc set to aggregate all loaded actual measures on a weekly basis to the corresponding APCS workbook visible measures. This process runs as part of the regular weekly batch. If the retailer has reloaded corrected actuals in the middle of week and wants to re-aggregate all loaded measures, then they can schedule this task.

Weekly batch by default only re-aggregates the last five weeks. This is controlled by Batch Aggregate Weeks and that can be changed under Batch Setup. If the customer wants to re-aggregate all elapsed weeks during any weekly run, they can set the Boolean Aggregate All Elapsed Weeks before the start of the weekly batch. That Boolean will get reset at the end of the weekly batch calculation.

Set Export Flags (exp_set)

This batch calc set is used to set the necessary export flags for all exports used by Item Planning. The user can control the position exported for all versions by setting the administration measure, addvexportb Export Mask, in the Manage Export worksheet. 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.

By default, daily and weekly batch runs these calculations before running the exports. The user 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 specific order that will be executed during batch task execution. This task is used to schedule a typical daily or weekly APCS batch. 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 user 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. A few configured tasks below can call another configured batch task recursively:

- Daily Batch (batch_daily)
- Weekly Batch (batch_weekly)
- Load Hierarchies (load_hier)
- Load Actuals (load_data)
- Load MFP Data (batch_mfp)
- Import Hierarchies (imp_hier)
- Import Actuals (imp_data)
- Import Forecasts (imp_fcst)
- Import RSE DT Data (batch_rse_dt)
- Import RSE Clusters Data (batch_rse_strc)
- Export Plan Data (exp_plan)
- Export New Placeholder Items (exp_item)
- Export New Product Attributes (exp_patt)
- Export to Allocation (exp_alloc)
- Export Plans to RI (exp_plan_ri)
- Export Assortment to RSE (exp_rse)
- Set RMF CS Dimension Mapping (set_rms_sib)
- Unset RMF CS Dimension Mapping (unset_rms_sib)
- Rename RMF CS Style-Color (batch_sib)
- Rename Placeholder Items (batch_ph_rn)
- Transform RMF CS Files (rms_xform)
- Set Dimension Attributes (batch_datr)
- Formalize Hierarchies (form_hier)
- Rebuild Dashboard (batch_dash)
- Post Build Batch (postbuild)
- Post Build Hierarchy (post_hier)
- Post Build Patch (postpatch)
- Export for Egress (exp_egr)

Daily Batch (batch_daily)

This task is used to schedule a typical daily batch which does the all plan data export and runs any daily batch process. Steps in this process are also part of Weekly Batch, so the retailer does not have to schedule this during the 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 Task: Set Batch Specific Flags
- If Enable Daily Exports is true: Set Export Flags and Export Plan Data

- Run Batch Calc: Daily Batch Calc
- Rebuild Dashboard and Refresh workbooks configured to refresh daily

Weekly Batch (batch_weekly)

This task is used to schedule a typical weekly 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, product structures, and information. Before scheduling this task, all necessary hierarchy and data files need to be uploaded to Object Storage. 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:

- Run Batch Calc: Set Batch Specific Flags
- If Enable Weekly Exports is true: Set Export Flags and Export Plan Data
- If Enable Batch Export to Allocation is true: Export to Allocation
- If Batch Uses RDX is true: Export Plans to RI
- If Batch Uses RDX is true: Export Assortment to RSE
- If Enable RMF CS Integration is true and Batch Uses RDX is false: Transform RMS Files
- If Batch Uses RMS is true: Rename Style/Color, otherwise, Rename Placeholder Items
- Import Hierarchies
- Load Hierarchies
- Import Actuals
- Load Actuals, Admin Data
- Run Batch Calc: Set Dimension Attributes
- Run Batch Calc: Weekly Batch Calc
- If Batch Uses AI Foundation Integration (DRDVORASEB) is set to true:
    - If Enable RSE DT Integration (DRDVRSEDTB) is true: Import RSE DT Data
    - If Enable RSE Cluster Integration (DRDVRSESTRCB) is true: Import RSE Clusters
    - If Enable RSE SPO Integration (DRDVRSESPOB) is true: Import RSE SPO Size Profile
- If Enable MFP CS Integration is set to true: Load MFP Data
- If Batch Uses RDX is set to true: Import Forecasts, other Load Forecasts
- Refresh Workbook Segments: All Plan Admin and Maintenance Templates
- Rebuild Workbook Segments: Planning Admin, Assortment Planning, Item Planning

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 (Enable RDX) is enabled, it only loads the hierarchies which are interfaced through RAP integration.

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:

- Calendar (clnd)
- Product (prod)
- Location (loc)
- Cluster (clrh)
- Product Attributes (patr)
- Location Attributes (satr)
- Assortment (asrt)
- Curve (curv)
- Location Space (sspc)
- Performance Group (pos1)
- Clustering Strategy (pos2)
- Cluster Source (csls)
- Cluster Version (cver)
- Customer Segment (csgh)
- Level (lvlh)
- Custom Messages (cmsh)
- Size (sizh)

For details about hierarchies, see the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

Load Actuals (load_data)

This task is used to load the all the input files that needed for APCS if those are uploaded to Object Storage. It mainly loads all the Actuals and Admin files.

For details about the list of measure files, see the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

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

Load MFP Data (batch_mfp)

This task is used to load the MFP interface files if the customer is using their own MFP version. They can upload the MFP interface files in the required format into Object Storage and run this task to load the MFP data.

For details about the list of measure files and about integration with MFP, see the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

This task automatically runs as part of the weekly batch, if Enable MFP CS Integration is set to true in the Planning Admin -> Batch Setup view from show/hide.

Import Hierarchies (imp_hier)

This task is used to import hierarchies that are coming from RI through RAP integration. It runs all the interfaces to pull the hierarchies data from RI. The list of interfaces it runs and dimension mappings details can be found in the Import Foundation and Transactional Data from Retail Insights section in the RAP Integration chapter of the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

This task automatically runs as part of the weekly batch, if Batch Uses RDX is set to true in the Planning Admin -> Batch Setup view from show/hide.

Import Actuals (imp_data)

This task is used to Import Actuals that are coming from RI through RAP integration. It runs all the interfaces to pull the hierarchies data from RI. The list of interfaces it runs and measure mappings details can be found in the Import Foundation and Transactional Data from Retail Insights section in the RAP Integration chapter of the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

This task automatically runs as part of the weekly batch, if Batch Uses RDX is set to true in the Planning Admin -> Batch Setup view from show/hide.

Import Forecasts (imp_fcst)

This task is used to import forecasts that are coming from AI Foundation through RAP integration. It runs all the forecast interfaces to pull the forecast data from AI Foundation. The list of interfaces it runs and measure mappings details can be found in the Import Forecasts from AI Foundation section in the RAP Integration chapter of the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

This task automatically runs as part of the weekly batch, if Batch Uses RDX is set to true in the Planning Admin -> Batch Setup view from show/hide.

Import Product Images (imp_img)

This task is used to import product image details that are coming from AI Foundation through RAP integration. It runs all the required interfaces to pull the image name and image address details from RAP. The list of measure mappings details can be found in the Import Foundation and Transactional Data from Retail Insights section in the RAP Integration chapter of the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*. If the Aggregate Image Boolean is enabled for different levels

in Planning Admin -> Batch Setup, the batch process will also aggregate the loaded Item Level images using the mode_pop agg type to show the images for Style-Color, Style, and Sub-class levels for which the Booleans are enabled. The customer can also disable Image aggregation and directly load different images for those levels by loading the corresponding Image URLs using a flat file and using the same task.

This task automatically runs as part of the weekly batch, if Batch Uses RDX is set to true in the Planning Admin -> Batch Setup view from show/hide.

Import RSE DT Data (batch_rse_dt)

This task is used to import DT parameters data such as Assortment Elasticity, Attribute Weights, and Functional Fit that are coming from AI Foundation through RAP integration. It runs all the DT interfaces to pull the data from AI Foundation. The list of interfaces it runs and measure mappings details can be found in the Import DT Parameters from AI Foundation section in the RAP Integration chapter of the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*. This process also loads the data from the input files if those are uploaded to Object Storage in the required file format.

This task automatically runs as part of the weekly batch, if Enable RSE DT Integration is set to true in the Planning Admin -> Batch Setup view from show/hide.

Import RSE Clusters Data (batch_rse_strc)

This task is used to import Location Clusters coming from AI Foundation through RAP integration. It runs all the interfaces needed to pull the location clusters data from AI Foundation. The list of interfaces it runs and measure mappings details can be found in the Import Location Clusters from AI Foundation section in the RAP Integration chapter of the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*. If Enable RDX is not set to true, it will try load to the data from the input files.

After loading external clusters, it runs the batch calculations to set it as Loaded Cluster for the department. It loads all the load clusters for different date ranges with a start date greater than the current business date into the Cluster Versions starting from Version 10 and above. Loaded clusters at the week level can be reviewed in the Load Validate workbook and those assigned to the version level can be reviewed in the Location Clustering Workbook.

This process also loads the data from the input files if those are uploaded to Object Storage in the required file format. This task automatically runs as part of the weekly batch, if Enable RSE Cluster Integration is set to true in the Planning Admin -> Batch Setup view from show/hide.

Import RSE Size Profile (batch_rse_spo)

This task is used to import Size Profiles coming from AI Foundation through RAP integration. It runs all the interfaces to load Size Hierarchy and Size Profile data from AI Foundation. The list of interfaces it runs and measure mappings details can be found in the Import Size Profiles from AI Foundation section in the RAP Integration chapter of the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

After loading size profiles, it runs the batch calculations to set the pre-ranges needed for Sizes to be used by the departments. This process also loads the data from the input files if those are uploaded to Object Storage in the required file format.

This task automatically runs as part of the weekly batch, if Enable RSE SPO Integration is set to true in the Planning Admin -> Batch Setup view from show/hide.

Export Plan Data (exp_plan)

This task exports all approved 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 if enabled, so the user needs to run this task only if they need to export all plan data as needed.

Following is the list of export plan versions that are exported:

- Item Plan - Pre-Season (ip_ipop)
- Item Plan - In-Season (ip_ipcp)
- Item Plan - OTB (ip_otb)

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 Assortment Planning Cloud Service Implementation Guide*.

This task automatically runs as part of the weekly batch, if Enable Weekly Exports is set to true in the Planning Admin -> Batch Setup view from show/hide. It runs as part of the daily batch if Enable Daily Exports is set to true.

Export New Placeholder Items (exp_item)

This export set is used to create a standard export for all new placeholder items created in Assortment Planning Cloud Service, if that needs to be interfaced to any other applications.

For details on the list of measures exported and the file name and format details, see the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

Export New Product Attributes (exp_patt)

This export set is used to create a standard export of new item/product attribute mapping for all new items or new product attributes defined in Item Planning, if that needs to be interfaced to any other applications.

For details on the list of measures exported and the file name and format details, see the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

Export to Allocation (exp_alloc)

This export set is used to create an export of approved receipts quantities for the Allocation system in its required format. This is an adhoc export and users can schedule it as needed.

For details on the list of measures exported and the file name and format details, see the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

Export Plans to RI (exp_plan_ri)

This task is used to export approved Assortment Plan data from APCS to RI through RAP integration. It runs all the export interfaces to export the approved plan data from APCS into RI staging tables. The list of interfaces it runs and measure mappings details can be found in the Export Assortment Plans to Retail Insights section in the

RAP Integration chapter of the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

This task automatically runs as part of the weekly batch, if Batch Uses RDX is set to true in the Planning Admin -> Batch Setup view from show/hide.

Export Assortment to RSE (exp_rse)

This task exports both Active Assortments at the item level and Assortment Periods for Location Clustering defined at the department level to AI Foundation through RAP integration. It runs the batch calculations first to set the flags for the export before running the interfaces. The list of interfaces it runs and measure mappings details can be found in the Export Active Assortments to AI Foundation and Export Assortment Periods for Location Clustering to AI Foundation sections in the RAP Integration chapter of the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

This task automatically runs as part of the weekly batch, if Batch Uses RDX is set to true in the Planning Admin -> Batch Setup view from show/hide.

Set RMF CS Dimension Mapping (set_rms_sib)

APCS can directly link with RMFCS in real time to directly use the reserved RMFCS items to create new placeholder items in APCS. It also allows exporting the items to RMFCS in real time using web service calls to the RMF CS Item Induction process staging tables to create new items. In order to initialize that process, this task needs to be run once to set the mapping of dimensions of Item and Style in APCS with RMF CS Item. Once that linkage is set, any DPM position created against those dimensions will use the reserved numbers from RMFCS. This process runs as part of the postbuild process. Users can use the rmsMgr utility under the Standard Admin Tasks to manage the reserved items.

Unset RMF CS Dimension Mapping (unset_rms_sib)

APCS allows customers to not use the RMF CS Webservice for reserving Item/Style positions. This process allows unlinking the Item/Style positions from using RMFCS reserved item positions. The customer needs to execute this process once to unlink the RMFCS dimension mapping so that new placeholder positions created within AP GA for Item and Style will not try to call the web service to get the reserved positions. It uses the standard naming convention for naming the newly created DPM positions.

Rename RMF CS Style-Color (batch_sib)

APCS uses Item, Style-Color, and Style in the product hierarchy, but RMFCS only uses Item and Style, and only those can be reserved from RMFCS when new DPM positions are defined. Style-Color in the product hierarchy file, is the concatenation of Style position id and the Color Attribute. During new placeholder creation of Style-Color, only one new Item is created using the reserved Item number but Style-Color is defined with standard DPM position names. That Style-Color needs to be renamed in batch with the same position id as Style concatenated with the Color Attribute name.

This process exports the new DPM Style-Colors, Style, and Color Attribute which are not renamed and renames those Style-Colors so that when this new item is approved in RMFCS and becomes part of the Hierarchy Load process, it will get correctly formalized. Color Attribute should be unique for each new Style-Color defined within a Style. If Color Attribute is empty or not unique, then the Rename Style-Color process will not rename those and it will be present in the logs. This process runs as part of the weekly batch process before the

hierarchy load to rename any new DPM Style-Color positions if RMFCS Web Service integration is enabled.

Rename Placeholder Items (batch_ph_rn)

APCS allows customers to use DPM without using the RMF CS Webservice for Reserving Item/Style positions. If the customer is not planning to use RMFCS and have their own system for the Item Master solution, then any DPM positions for Item, Style-Color, and Style in the product hierarchy needs to be renamed first with the actual position ids from the Item Master system before it can be formalized through the regular hierarchy load process.

This process allows customers to rename the positions. It first loads the rename mapping files for Item, Style-Color, and Style if the customer uploaded those or they can set the same directly for DPM positions in the Planning Admin setup. This process renames those positions only if those are DPM positions that are not formalized. This process runs as part of weekly batch before hierarchy load process if RMF CS Web Service Integration is not enabled.

Transform RMF CS Files (rms_xform_ftp)

This task is used to transform all hierarchy and data files from RMFCS to the required format. It runs as part of Weekly Batch if Enable RMF CS Integration is set to true and Batch Uses RDX is false. This task, when run as a stand-alone task, transforms the RMFCS hierarchy and data files, also creates rms_hier.zip, and copies the files to Object Storage. This task is mainly for creating the initial set of transformed RMFCS hierarchy files to build a new application with the RMFCS foundation hierarchy files. The user does not need to use this task if there is no RMFCS integration or ifthe customer used RAP integration.

The Batch Transform task formats the interface files by filtering the required columns or splitting the input files into multiple files needed for the interface.

This task runs the following activities in this order:

- Transform RMS Calendar Hierarchy File
- Transform RMS Product Hierarchy File
- Transform RMS Location Hierarchy File
- Transform RMS Inventory File
- Transform RMS Tran Data File
- Transform RMS On Order File
- Transform RMS Product Attribute Files
- Transform RMS Location File

Set Dimension Attributes (batch_datr)

APCS supports the use of product attributes to enable creating new items and assigning product attributes for them from like items from the UI. Whenever a new set of product attributes is loaded, this task needs to be scheduled to set the dimension attributes in order for them to be visible in UI. This task runs as part of the Weekly Batch and needs to be scheduled only if a new set of product attributes is loaded in the middle of the week.

Formalize Hierarchies (form_hier)

This task is available to formalize the DPM-enabled hierarchies. Once formalized, users cannot delete the formalized DPM positions from the client. Only the informal position created in the hierarchies listed below will be formalized if this task is scheduled to run. The user can schedule this task on an as-needed basis; currently, this is not part of the daily or weekly batch schedule.

Following is the list of hierarchies that can be formalized using this task:

- Assortment Group (asrt_bper)
- Cluster Version (cver_vers)
- Location Attributes (satr_satv)
- Performance Group (pos1_clst)
- Product (prod_sku)

For only the Product Hierarchy, it will only formalize the selected items by the measure WP Formalize Placeholder Item; for other hierarchies, it will formalize all informal positions present in the hierarchy.

For details about hierarchies, see the *Oracle Retail Assortment Planning Cloud Service Implementation Guide*.

Rebuild Dashboard (batch_dash)

This task can be scheduled to rebuild the dashboards on demand based on the new Key Items selection criteria. It runs the batch process to select the Key Items to display in the dashboard based on the user selection in the Admin workbooks and rebuilds all the dashboard segments. This task runs by default in the daily batch, but this can be scheduled if the user wants to rebuild dashboards within a day for new selection criteria.

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 the workbook segments to include the patch changes. It runs as part of the patch upgrade, but 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.

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 Tool 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 APCS application as an Administration user.

2. In the Tasks list, select Admin Tasks for AP CS Customer Domain and then select Online Admin Tools. Click **Submit a New Admin Task**.

Figure 1-1   Administration Tasks
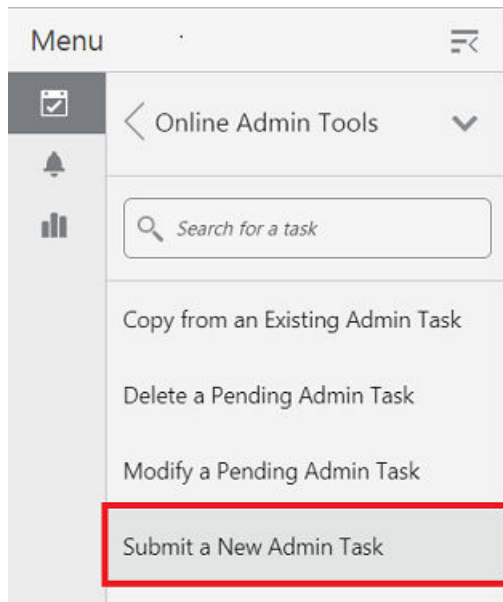
3. Select the Configured Batch Tasks for the Task Group and click **Next**.

Figure 1-2   Select Task Group Window
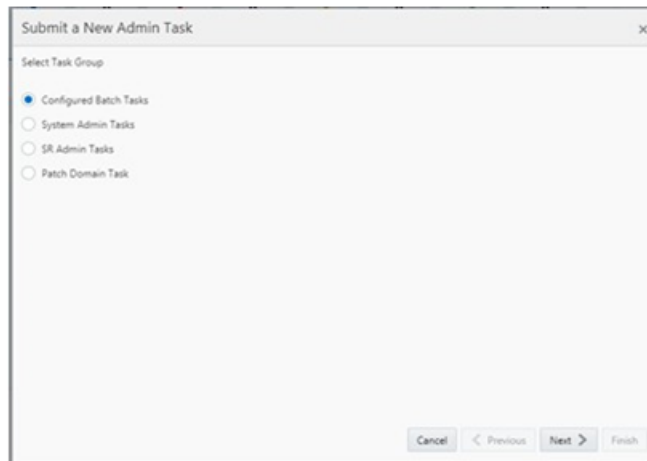
4. In the task list, select Run Measure Export Group and click **Next**.

Figure 1-3   Select Task Workbook Wizard Window
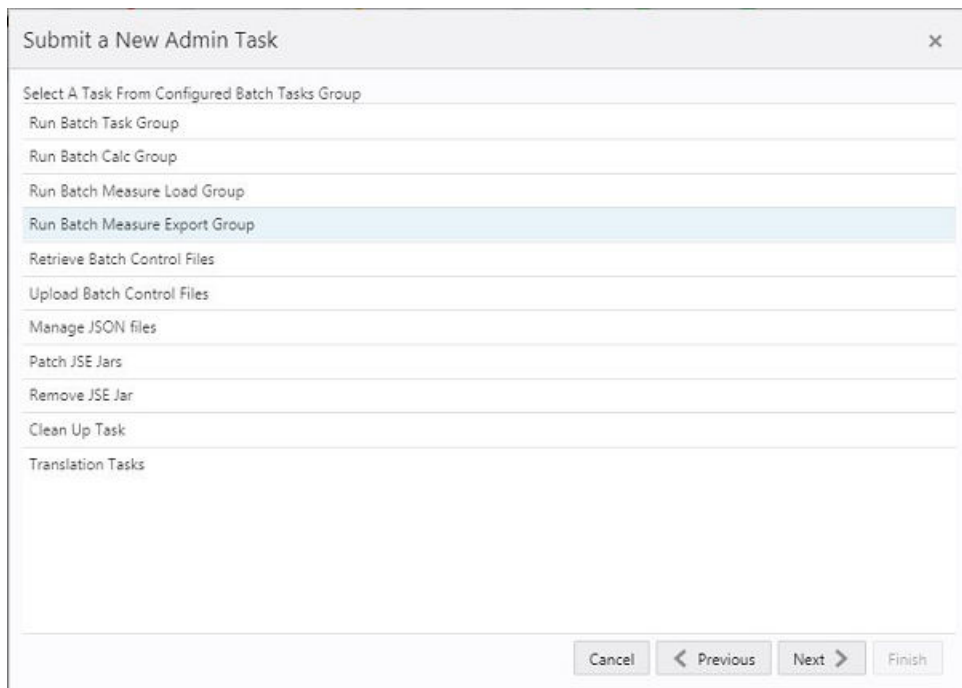
5. Enter the Task Label. This task has an additional parameter to choose the export measure group. In following figure, as an example, Item Plan - Pre-Season is selected. Click **Next**.

Figure 1-4   Select Export Measure Group

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

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

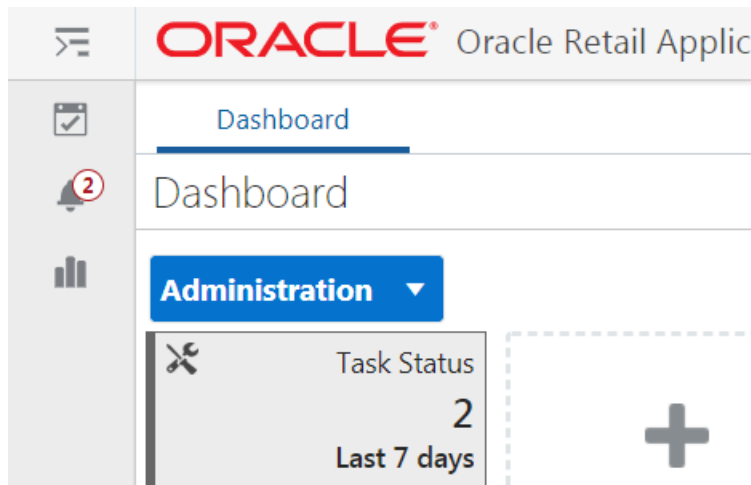**Figure 1-6   Confirm Action Window**
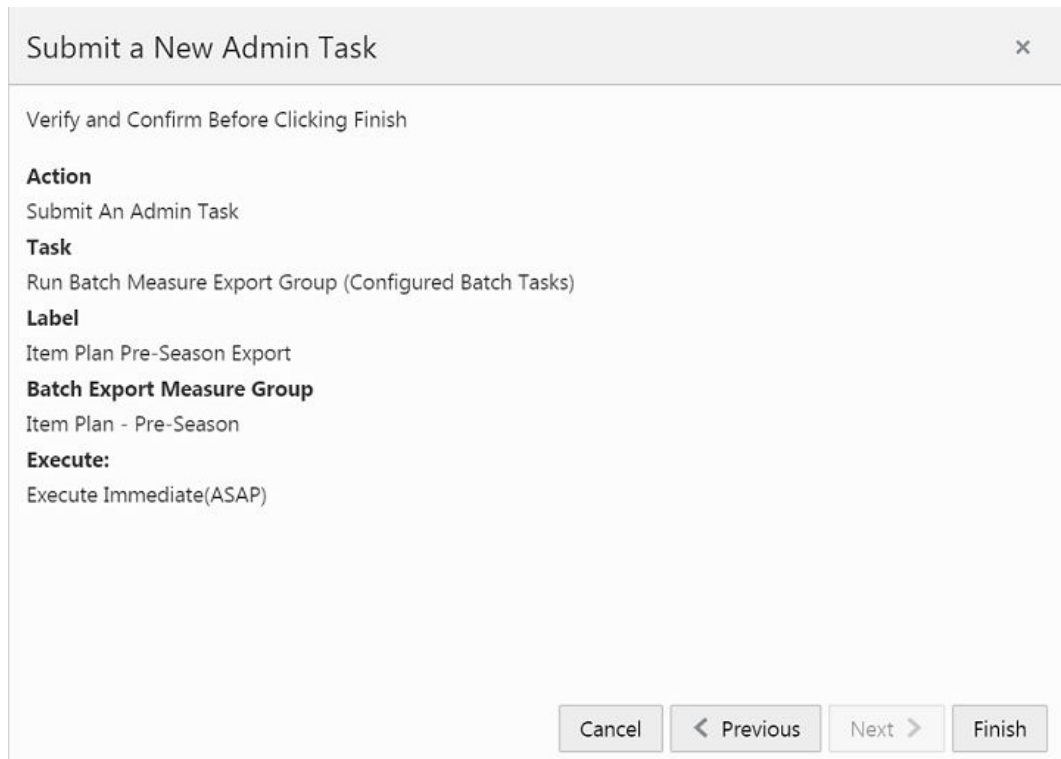
The task submitted confirmation message appears.

**Figure 1-7   Task Submitted Confirmation Message**
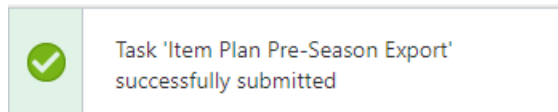
8. To check the status of all submitted tasks in the Dashboard, click **Dashboard** and select **Administration** from the list of Dashboard Profiles in the dropdown.

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
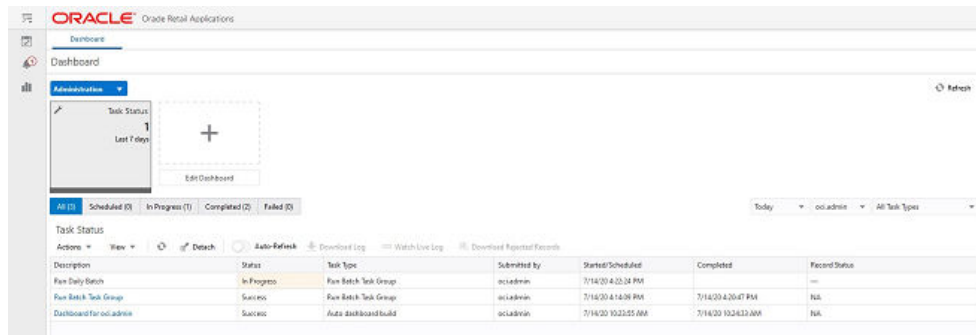
The Status column shows whether a job has completed successfully, failed, or is pending (Scheduled). For any completed (Success/Failed) tasks, click the job name to view the subtask details if any for that job. To view the log, select the task and click Download Log. For failed tasks, the logs show the 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 'rpasce_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 in to the application. If the user is logged in with administrator access, they will also see the Administration tasks status board as one of the profiles, which shows the scheduled batch job status.

Figure 1-10   Dashboard - Administration Tasks Status
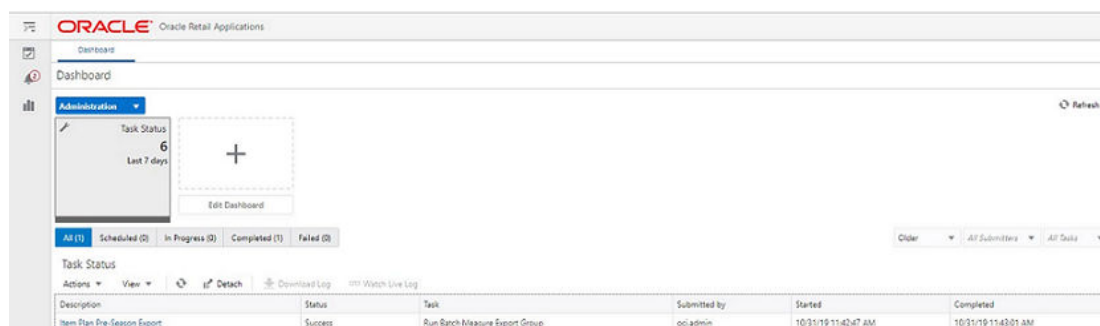
There are four additional dashboard profiles pre-configured for APCS as specified below. In APCS, users need to set the Key Item selection criteria for their classes in the Admin setup. The daily batch will rank and select the predefined set of items to be shown in the subsequent dashboard build. For more details about the dashboard, see the *Oracle Retail Assortment Planning Cloud Service User Guide*.
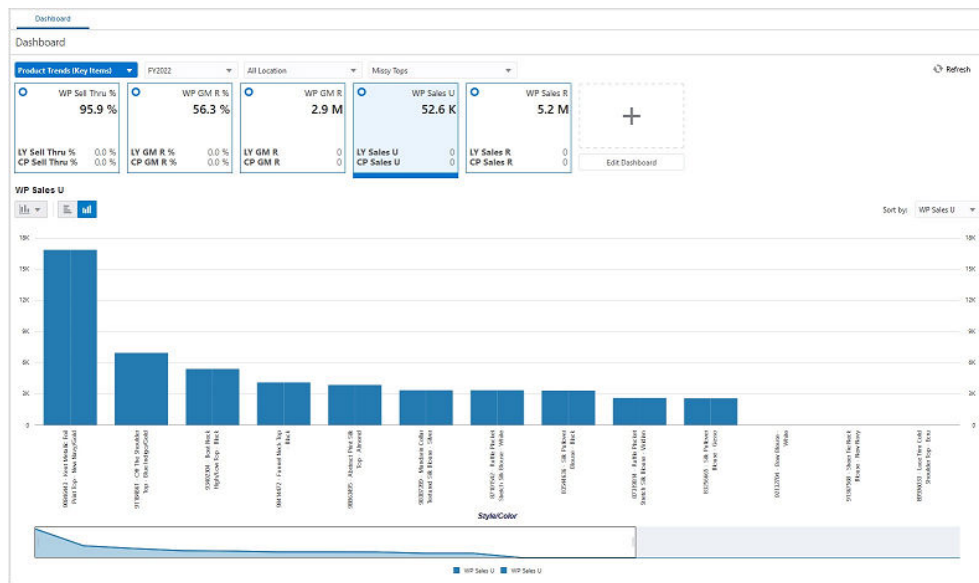
1. Weekly Trends (Key Items): This shows the performance of key items at the week level as different metric tiles.

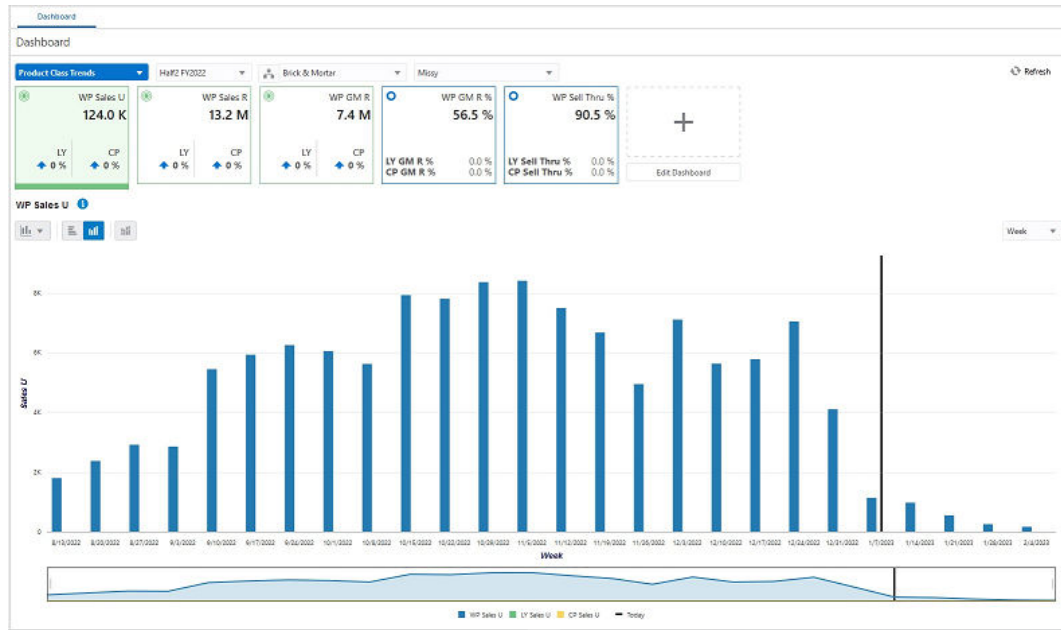**Figure 1-11   Dashboard - Weekly Trends (Key Items)**
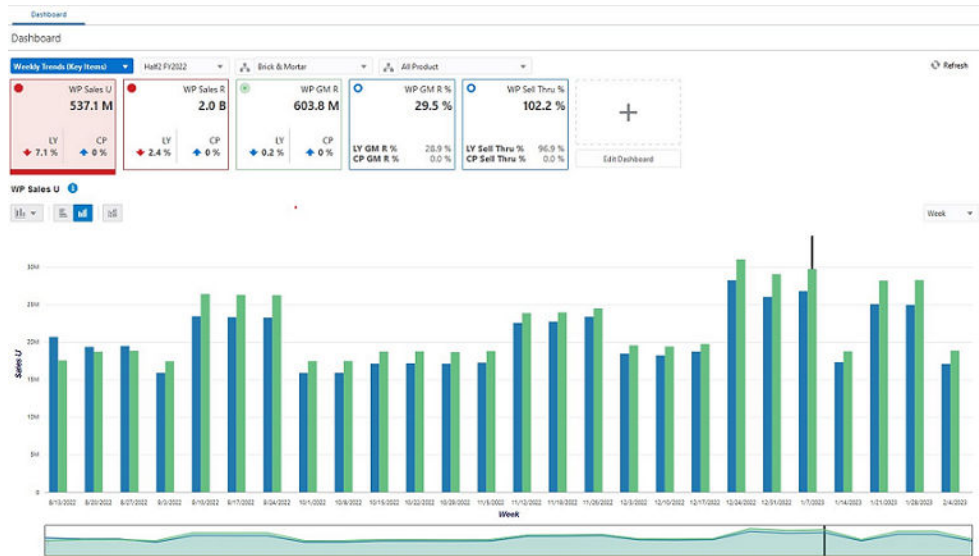
2. Product Trends (Key Items): This shows the same key items to view sorted based on Item Performance.

Figure 1-12   Dashboard - Product Trends (Key Items)
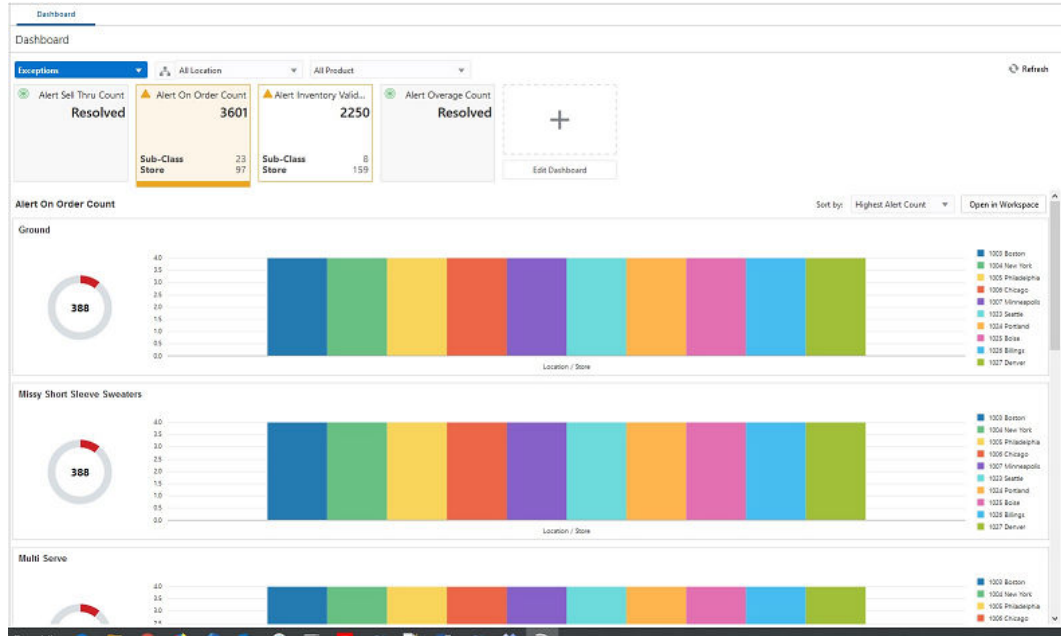

3. Product Class Trends: This shows the class level performance of all items at the week level as different metric tiles.

Figure 1-13   Dashboard - Product Class Trends

4. Exceptions: Pre-configured exception alert metric tiles based on the selected key items.

Figure 1-14   Dashboard - Exceptions

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

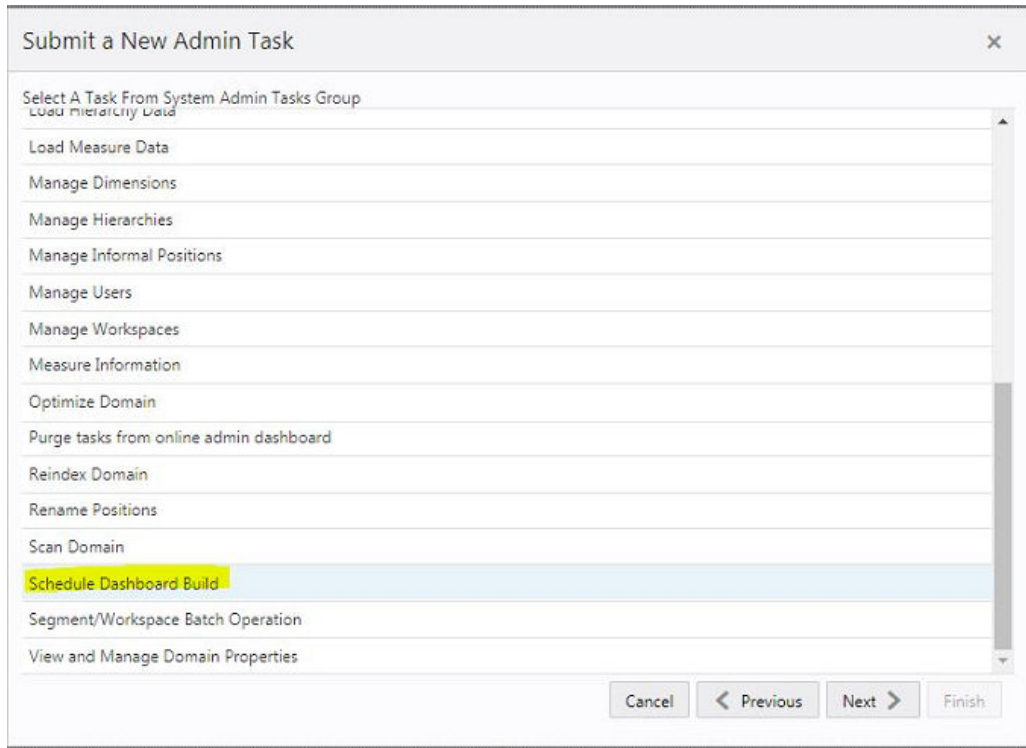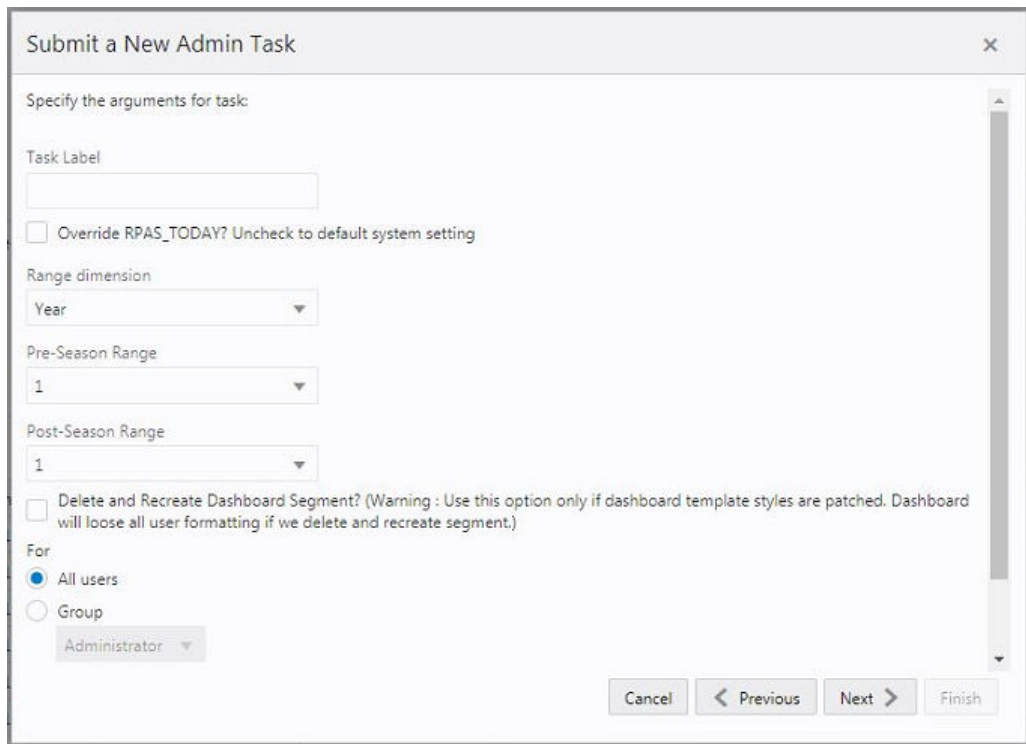**Figure 1-15   Schedule Dashboard Build Task**

Figure 1-16   Specify Arguments for Schedule Dashboard Build Task

- Task Label - Enter the name of the build task to review the status of build.

- Select Override RPAS_TODAY - Check the 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: 0, and Post-Season Range: 1.

Retail Home

If Retail Home is provisioned, it provides a dashboard view of key configured metrics as tiles across multiple applications in the enterprise. Assortment Planning has the following tile view 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.

Figure 1-17   Assortment Planning Tile View for Retail Home

Metrics shown in the above figure:

- Sales U - Sales U for current Season to Date total for all items containing the current week.

- var to Plan - Variance to Plan.

There are also other tile states for the same metrics for Sales R and Gross Margin.

2
Build/Patch Application

This chapter describes the process to build or patch the application.

Self Service - Installing the AP Cloud Service Application from the Bootstrap Domain

This section describes the process of installing AP Cloud Service from the bootstrap domain with retailer data and generated configuration for the plug-in options. Once RPASCE and AP 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 generate the configuration for different plug-in options.

Bootstrap Environment

A newly provisioned APCS 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 construct a domain. 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 ascs_config.zip with prefix incoming/config.
- Interface Configuration file interface.cfg with prefix incoming/config
- Dashboard JSON file dashboardSettings.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 AP Cloud Service using the bootstrap domain:
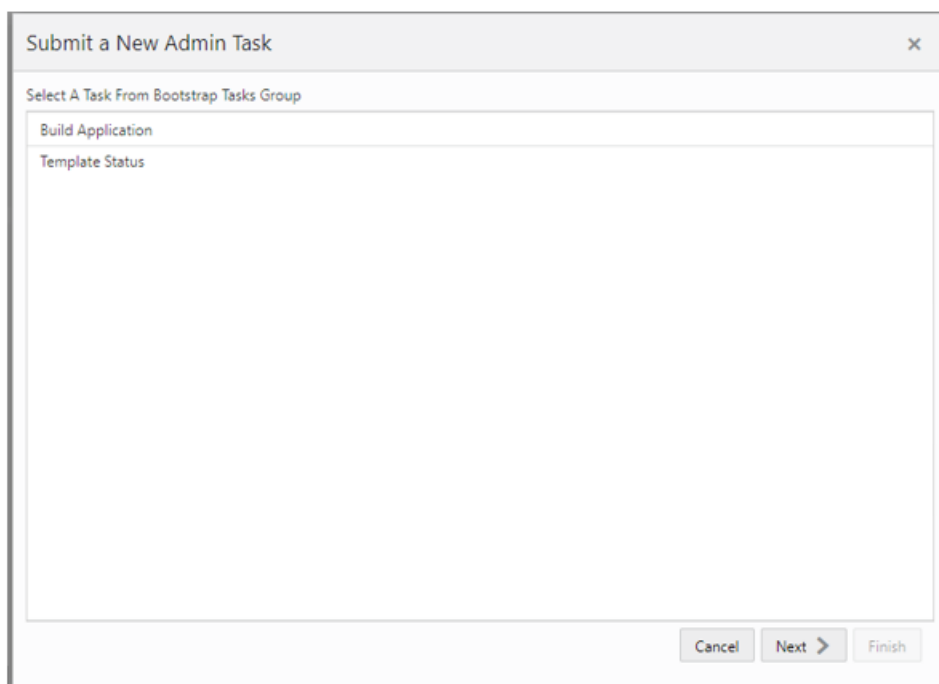
1. After provisioning AP Cloud Service, log in to the bootstrap domain as an Administration user.

2. In the Tasks list, select Admin Tasks for RPASCE Bootstrap and and then Online Admin Tools. Click **Submit a New Admin Task**.

Figure 2-1   Admin Tasks for RPASCE Bootstrap Task
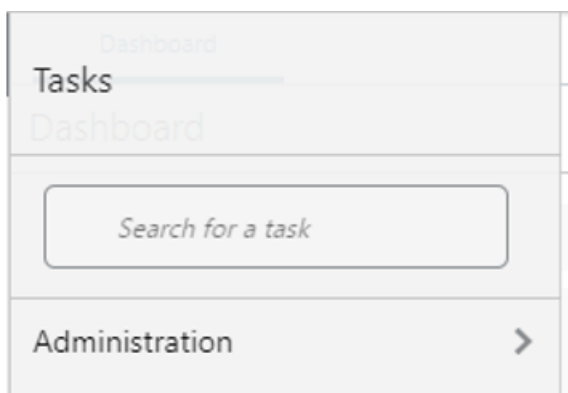
3. Select the Build Application task and click **Next**.

Figure 2-2   Select Build Application Task

4. Set the arguments for the task:

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

a. Enter the Task Label.

b. Partition Dimension is defaulted to dept dimension in the APCS 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 APCS 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

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

Figure 2-5   Verify and Confirm Selections

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.

Self Service - Patching the AP Cloud Service Application

This section describes the process of patching the AP Cloud Service application using the Online Administration Tools. Once the RPASCE and AP Cloud Service upgrade patches are installed in the Oracle Cloud environment, the AP 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 AP Cloud Service application as an Administration user:

1. After deploying AP Cloud Service, log in to the application as an Administration user.

2. In the Tasks list, select Admin Tasks for Assortment Services and then Online Admin Tools. Click **Submit a New Admin Task**.

Figure 2-6   Admin Tasks for RPASCE Bootstrap Task
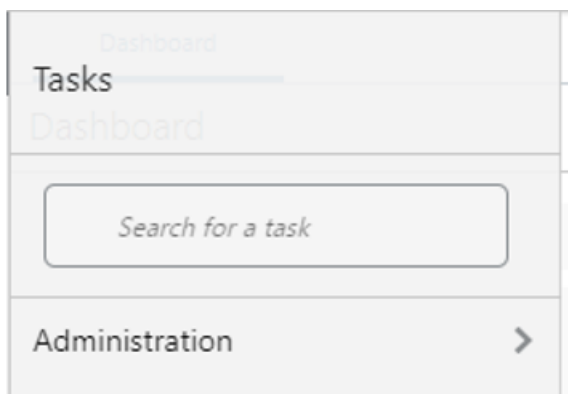
3. Select the Patch Application Task and then click **Next**. Then select Patch Application in the available list of tasks.

Figure 2-7   Select Patch Application Task
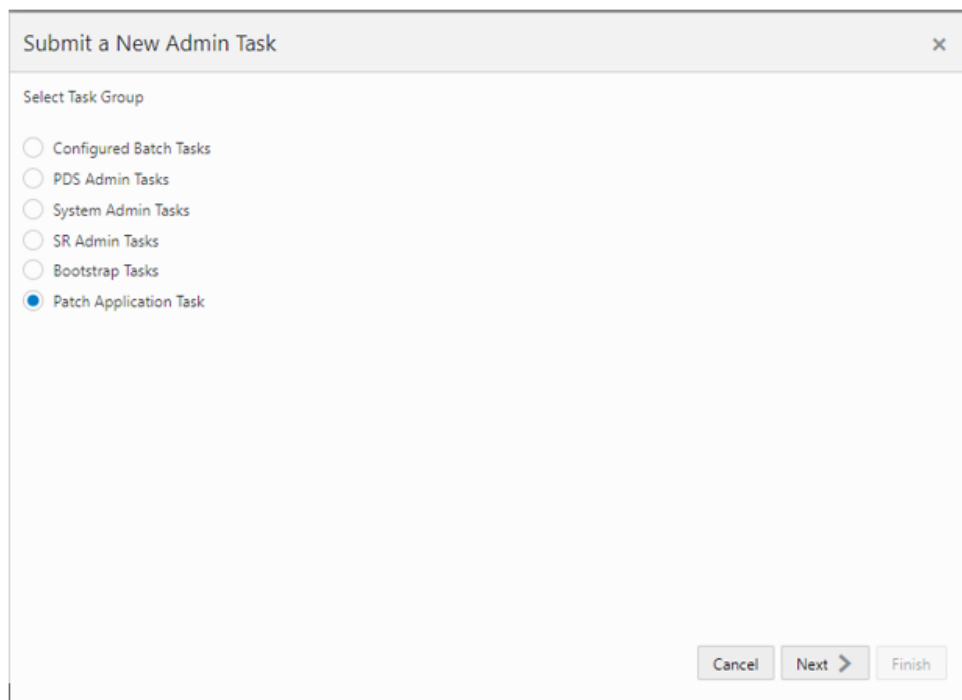
4. Set the arguments for the task:

Figure 2-8   Select Patch Application Task Arguments

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.

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

Figure 2-9   Verify and Confirm Selections

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

Template Status

The APCS 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 the APCS Configuration. See the *Oracle Retail Assortment Planning Cloud Service Implementation Guide* for extensibility guidelines for the APCS 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 2-10   Template Status

3
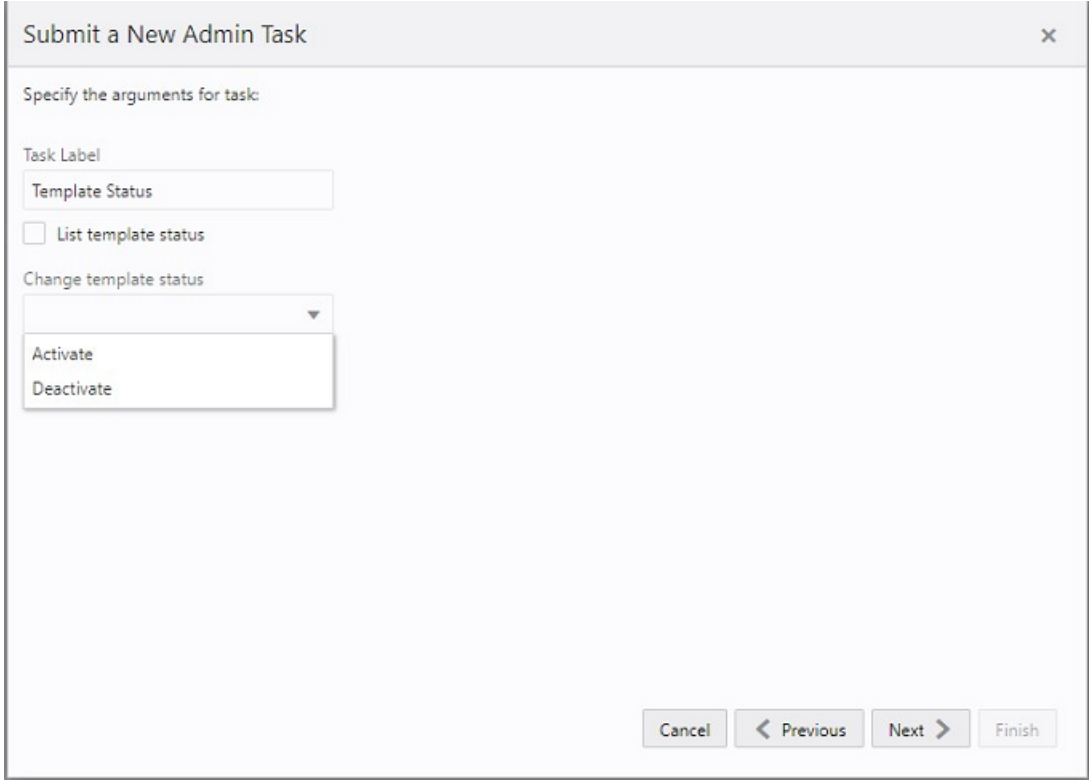
User and Role Maintenance

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 Assortment 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 Assortment Planning Cloud Service application and assigned to the same user group.

AP 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.

The Administrator can assign the above role or roles to the user. Follow the steps in Managing Users in OCI IAM.

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 AP 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 Assortment 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 Assortment Planning Cloud Service application.
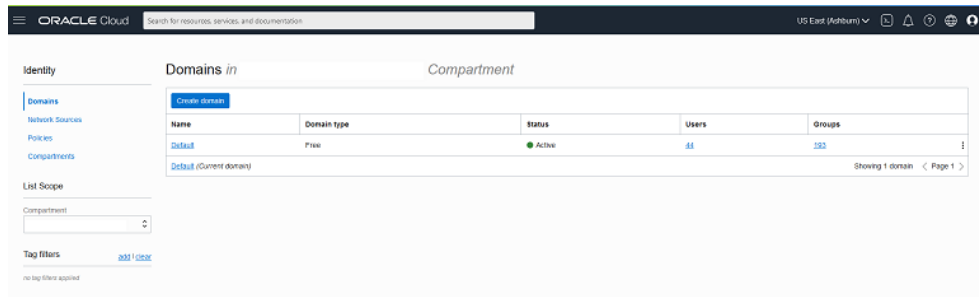
> **Note:**
>
> The OCI IAM Application URL and login with the required administrator access are needed to perform the following steps. The welcome email sent by Oracle includes the URL.

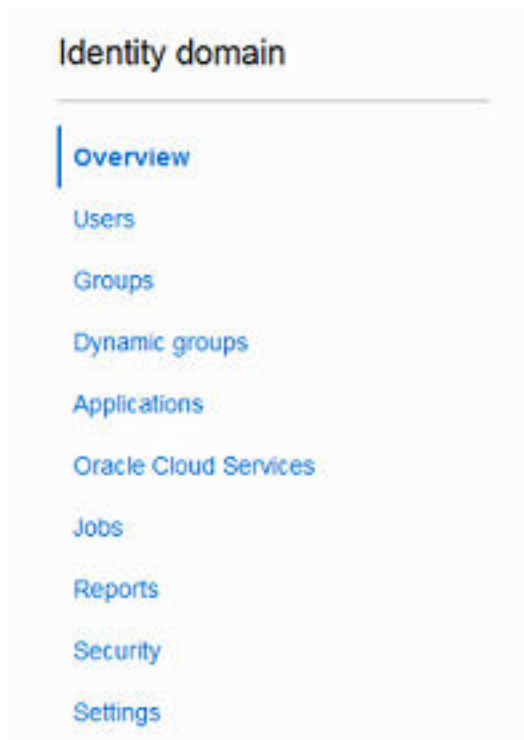The following steps explain how to define users and assign roles for a new user:

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

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

Figure 3-3   Create User

5. Provide the First Name, Last Name, and unique user name. If the Use the email address as the username 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.

6. 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.

7. 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:

1. Under User Administration, click **Add User Group**. A Workbook Wizard window appears.

2.   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
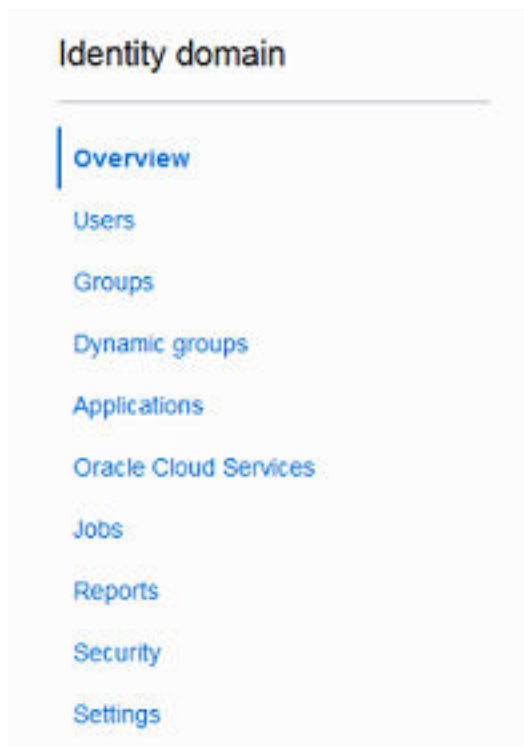
4. Click the user that you want to edit.

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 Assortment 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 link: https://docs.oracle.com/en-us/iaas/Content/Identity/home.htm.