

Oracle® Retail Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment **Administration Guide**



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Preface

This document describes the administration tasks for Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment.

Audience

This document is intended for administrators.

Documentation Accessibility

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

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

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

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

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

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

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.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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Administration Process

The intent of this document is to guide an Administrator for Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment (IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment) to perform the recurring administrative activities for the IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment application. This document outlines all administration activities required to support a live IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment 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 IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment Administrative activities can broadly be classified into two categories. This document follows these categories and provide details for the tasks within them.

Regular Activities:

- IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment Batch Task Administration
- Patch/Install Domain

Ad-hoc Activities:

- User And Role Maintenance
- Monitor Domain Performance

Regular Activities

Once an IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment 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 IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment users to manage and share their forecast. Internally, it also does the calculations for necessary data aggregation.

The IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment 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. The Administrator can also decide to run the export of data exclusively without running a weekly/daily batch.

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 IPOCS-Demand Forecasting application.
- Remove an existing user who has left the organization and needs to be removed from the IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment environment.
- Manage a user's access when the role changes within the organization.

This document describes the necessary actions to fulfill 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 forecast analysts 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.

*Currently, Hierarchy is also referred to as Dimension for the IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment application.

Oracle Support

It is requested that all retailers submit Oracle Retail IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment 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

IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment Batch Task Administration

The Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment batch task is a powerful tool provided to the Administrator to manage periodic load/export of Data/Hierarchy from the front end.

IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment uses the Oracle Retail Predictive Application Server Cloud Edition (RPASCE) Online Administration Tools as part of scheduling RPAS 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. 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 more detailed understanding of the Online Administration Tools and standard administration tasks, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

The Oracle Retail Job Orchestration and Scheduler (JOS) and Process Orchestration and Monitoring (POM) are used to schedule pre-configured jobs from IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment. 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 IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment. Customers can also customize the tasks by changing the control files as part of the Extensibility framework. For allowed changes, refer to the *Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment Implementation Guide*.

Application-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. IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment 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 the Object Store, and Administrators can download these exported files.

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

The following list shows the application-specific administration tasks that are pre-configured for IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment under Configured Batch Tasks:

- [Run Batch Measure Load Group](#)
- [Run Batch Calc Group](#)
- [Run Batch Measure Export 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

Use this task to load a predefined set of measures grouped as a measure set in the batch control file `batch_loadmeas_list.txt`. All required data files must be uploaded to the ObjectStore location before scheduling this task. 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 or Run Batch Task Group task after scheduling this task in order to process the loaded data.

The Predefined Measure Load Option in IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment is **Load New Item Facts** - Load attribute weights, forecast start override, and new item rate of sales for new items.

For details about the list of measure files, file format, and source information, see the *Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment Implementation Guide*.

The retailer can customize this task to load different sets of measures by customizing the batch control files. For information about customizing/extensibility of the batch control files and how to upload them, see the *Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment Implementation Guide*.

Run Batch Calc Group

Use this task to run a predefined set of batch rules (as batch calc sets) on the data as defined in the batch control file `batch_calc_list.txt`.

The following predefined batch calculation sets are available in IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment:

- **Lifecycle Assortments** – Calculate the loaded or user defined assortment dates based on the assortment parameters defined. One of the outputs of this calculation is the assortment active which is the mask to calculate rule setup and parameters.

- **Lifecycle Initialize Rule Groups** – Calculate the scopes for each rulegroup to be used for the workspace's wizard and batch calculation of Lifecycle Network Rule and Lifecycle Repl Param Rule.
- **Lifecycle Initialize Today** – Update the Lifecycle Allocation and Replenishment's internal today measures with `RPAS_TODAY`.
- **Lifecycle Inventory Plan** – Calculate the time-phased inventory plan. The output is the units that need to be received to achieve the target level at the SKU/Stor/Week level. This also calculates the beginning and end of period inventory projection.
- **Lifecycle Load Data** – Calculate loaded/interfaced data into Lifecycle Allocation and Replenishment's primary measures (such as: inventory, loaded attributes, forecast, assortments, loaded parameters, OTB).
- **Lifecycle Network Rule** – Calculates the BOD, Planning and Lifecycle calendar for specific sku/store based on the rule conditions setup by the users. The output LFC active mask will be used on the Lifecycle Repl Param Rule.
- **Lifecycle Post Replenishment** – Recalculates all KPIs related to availability.
- **Lifecycle Replenishment Alerts** – Calculate the replenishment alerts (such as: shortages, overstock, max stockroom, no replenishment parameters, or watch list).
- **Lifecycle Replenishment Approval** – Proposed orders will be auto-approved for all items and locations that have no critical alerts.
- **Lifecycle Replenishment Calculation** – Calculate the replenishment calculation based on the network setup and replenishment parameters generated from the rule management. The output of this calculation are system proposed order plan, surplus/deficits and updated available units.
- **Lifecycle Replenishment Databag**– Recalculates the scopes and filter conditions of databags. Databags are used as pre-range mask for building Lifecycle Allocation and Replenishment workbooks.
- **Lifecycle Replenishment KPIs** – Calculate the KPIs in Lifecycle Allocation and Replenishment related to inventory, sales and forecast (such as: total sales for Week -1, -2, -3, and so on)
- **Lifecycle Replenishment Parameters Rule** – Calculates the replenishment, constraint, and inventory plan parameters for specific sku/store based on the rule condition setup by the users. These parameters are used to calculate proposed orders and inventory plan.

Run Batch Measure Export Group

Use this task to export a predefined set of measures grouped as a measure set in the batch control file `batch_exportmeas_list.txt` to ObjectStore.

The following predefined measure export options in IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment are:

- **Export Future Purchase Orders** - Export approved inventory plan for warehouses.
- **Export Future System Purchase Orders** - Export to ObjectStore system calculated inventory plan for warehouses.
- **Export Future System Transfers** - Export system calculated inventory plan for stores.
- **Export Future Transfers** - Export approved inventory plan for stores.
- **Export Proposed Purchase Orders** - Export proposed order plan from suppliers to warehouse.

- **Export Proposed Transfers** - Export proposed transfer plan from warehouse to stores.
- **Export Supplier Information** - Export file `suppinfo.csv` with values from measure Supplier Info.

Run Batch Task Group

Use this task 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 weekly (or daily) IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment 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:

- **Calculate Databag Dashboard** – Recalculates the scopes and filter conditions of databags. Databags are used as pre-range mask for building Lifecycle Allocation and Replenishment workbooks. This will also calculate the metrics and exception dashboard of the Lifecycle and then rebuild the dashboard.
- **Data Synchronization after Data Loading** – If the user or implementer loads data outside of the normal GA structure, running this set ensures derived data is calculated for use by the batch steps and workbooks.
- **Export Approved Forecast** – Export the approved forecast to RDX.
- **Export Approved Lifecycle Plan** – Verify the approved plan and move it to export measures. Export to ObjectStore the proposed transfer plan from warehouse to stores, proposed order plan from suppliers to warehouse, approved inventory plan for stores, approved inventory plan for warehouses, system calculated inventory plan for stores, and system calculated inventory plan for warehouses.
- **Export for Egress** – For use by Egress customers only. Exports needed hierarchy and fact data to RI.
- **Export Forecast Parameters** – Export forecast parameters to RDX.
- **Export User Entered Lifecycle Setup Data** – Export User Entered Data from Supply Chain Network and Replenishment Parameters workbooks into a single zip file (`lfc_setup_data.zip`). The primary purpose of this task is to migrate User Entered Lifecycle data from one environment to another (such as, Stage to Prod).
- **Import Forecast and Preprocess Components** – Import forecast components and preprocess components from RDX.
- **Import Forecasting Facts** – Import facts used for forecasting from RDX.

- **Import Forecasting Hierarchies** – Import standard forecasting hierarchies from RDX.
- **Import Lifecycle Facts** – Import facts used for Lifecycle Allocation and Replenishment from RDX.
- **Import User Entered Lifecycle Setup Data** – Import User Entered Data is exported in the Export User Entered Lifecycle Setup Data task. Moving the zip file from the source environment `objectStore` to the destination environment `objectStore` and unzipping is a manual task.
- **Lifecycle 1st Intra-day Batch** – First iteration of intra-day batch calculation and export, usually runs at 12:00 p.m. This moves the approved plan to export plan measures and separate the POs and Transfers before exporting it to flat files.
- **Lifecycle 2nd Intra-day Batch** – Second iteration of intra-day batch calculation and export, usually runs at 3:00 p.m. This moves the approved plan to export plan measures and separate the POs and Transfers before exporting it to flat files.
- **Lifecycle Daily Batch** - Run the complete daily batch for Lifecycle Allocation and Replenishment.
- **Lifecycle Pre-Setup Batch** – Imports and loads hierarchies and facts required for Lifecycle Allocation and Replenishment, initializes the internal today measures with `RPAS_TODAY`. Calculates primary measures (such as: inventory, loaded attributes, assortments, loaded parameters, OTB). Update the product and location dimensions into attributes.
- **Load Forecasting Facts** – Load facts used for forecasting from ObjectStore. Calculate pre-range masks for forecasting workbooks.
- **Load Forecasting Hierarchies** – Load hierarchies used for forecasting from ObjectStore.
- **Load Lifecycle Facts** – Load inventory, on order, receipts and other data needed for Lifecycle batch from ObjectStore.
- **Load Lifecycle Hierarchies** – Load hierarchies used for Lifecycle Allocation and Replenishment from ObjectStore.
- **Post Build** – Batch run directly after building the application for the first time.
- **Post Forecast Batch** – After importing forecast and preprocess components, calculate alerts and approve forecasts.
- **Post Patch** – Batch run every time after patching the application. Do not run at any other time unless requested to by support.
- **Pre-Forecast Batch** – Prepare forecast parameters for export to RDX.
- **Send Unprocessed Purchase Orders to RMS** – Send unprocessed purchase orders generated by IPO-LAR to RMS.
- **Send Unprocessed Transfers to RMS** – Send unprocessed transfers generated by IPO-LAR to RMS.

 Note:

In addition to the previously listed sets, there are many sets that begin with `IPO_`. They are documented in Appendix C of the *Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment Implementation Guide*.

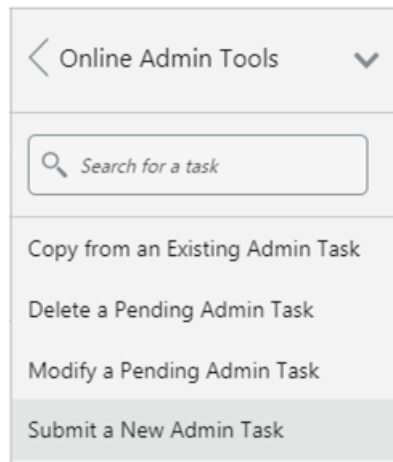
Scheduling Configured Batch Administration Tasks

This section walks through an example of the process for scheduling and monitoring the Configured Batch Administration task in the Run Batch Task 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 Tools 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 IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment application as an Administration user.
2. In the Tasks list, select **Admin Tasks for RDFCS Customer Domain** and then **Online Admin Tools**. Click **Submit a New Admin Task**.

Figure 1-1 Administration Tasks



3. Select **Configured Batch Tasks** and click **Next**.

Figure 1-2 Select Task Group

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 "Select Task Group" and contains a list of radio button options: "Configured Batch Tasks" (selected), "PDS Admin Tasks", "System Admin Tasks", "SR Admin Tasks", "Bootstrap Tasks", and "Patch Application Task". At the bottom right, there are three buttons: "Cancel", "Next >", and "Finish".

4. In the task list, select **Run Batch Task Group** and click **Next**.

Figure 1-3 Select Task Workbook Wizard Window

The screenshot shows the same dialog box, but now the "Next >" button is disabled. The main area is labeled "Select A Task From Configured Batch Tasks Group" and contains a list box with the following items: "Run Batch Task Group" (highlighted), "Run Batch Calc Group", "Run Batch Measure Load Group", "Run Batch Measure Export Group", and "Translation Tasks". At the bottom right, the buttons are "Cancel", "< Previous", "Next >", and "Finish".

5. Enter the Task Label. This task has an additional parameter to choose the **Batch Task Group** to be run. In [Figure 1-4](#), as an example, **Export Approved Forecast** is selected. Click **Next**.

Figure 1-4 Export Approved Forecast

Submit a New Admin Task

Specify the arguments for task:

Task Label
Run Batch Task Group

Offline Mode Message

Batch Task Group
Export Approved Forecast

Restart from Step Number (optional, leave blank to run all steps)

Log level

☐ Send Log File package for each step

Cancel < Previous Next > 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, or Monthly). Provide the Server Start and Stop Date/Time and click **Next**.

Figure 1-5 Schedule Task Workbook Wizard Window

The screenshot shows a window titled "Submit a New Admin Task" with a close button (X) in the top right corner. The main area is labeled "Schedule Task". It contains two radio buttons: "Run ASAP" (unselected) and "Run on a schedule" (selected). Below the "Run on a schedule" option is a dropdown menu currently showing "One time". Underneath is a text field labeled "Server Start Date/Time:" containing the value "11/30/18 08:17 AM" and a small calendar icon to its right. At the bottom right of the window 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

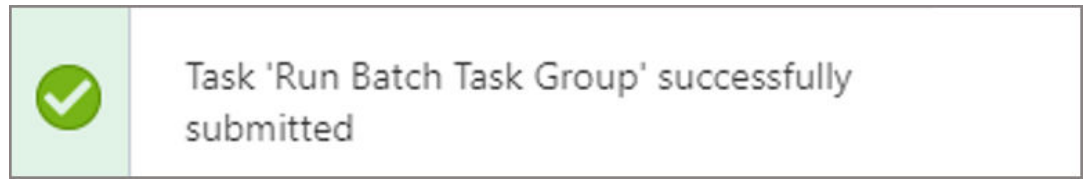
The screenshot shows the same window titled "Submit a New Admin Task" with a close button (X) in the top right corner. The main area is labeled "Verify and Confirm Before Clicking Finish". It displays a summary of the task configuration in a list-like format:

- Action**
Submit An Admin Task
- Task**
Run Batch Measure Export Group (Configured Batch Tasks)
- Label**
Export Daily Demand
- Batch Export Measure Group**
Export Daily Demand
- Execute:**
Execute one time on 2018/11/30 09:17:00 AM

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

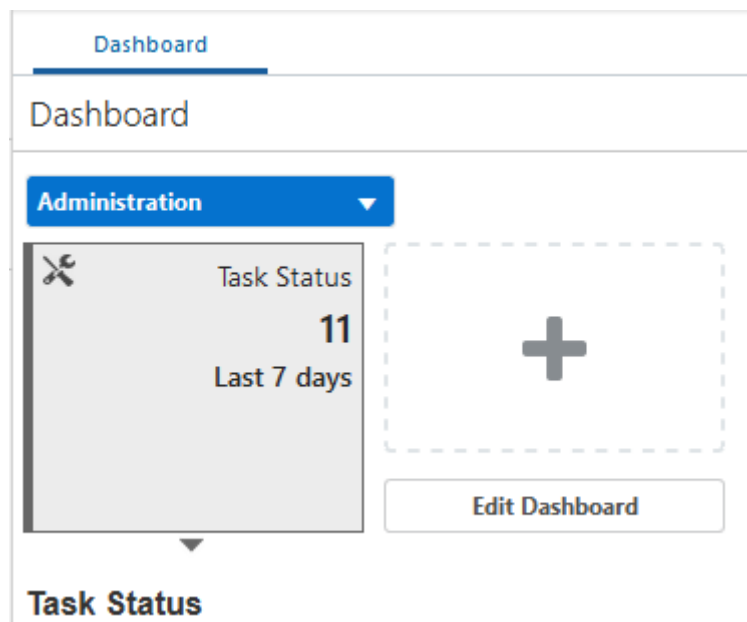
The task submitted confirmation message appears.

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 drop-down list.

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

ORACLE® Oracle Retail Applications						
Dashboard						
Administration						
Task Status						
All (1) Scheduled (0) In Progress (1) Completed (2) Failed (0)						
Task Status						
Actions View Refresh Download Log Watch Live Log Download Rejected Records						
Description	Status	Task Type	Submitted by	Started/Scheduled	Completed	Record Status
Run Daily Batch	In Progress	Run Batch Task Group	ocladmin	7/14/20 4:22:24 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	NA
Dashboard for ocladmin	Success	Auto dashboard build	ocladmin	7/14/20 10:22:55 AM	7/14/20 10:24:32 AM	NA

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 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 is also uploaded to Object Store so it is available for customers to 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
```

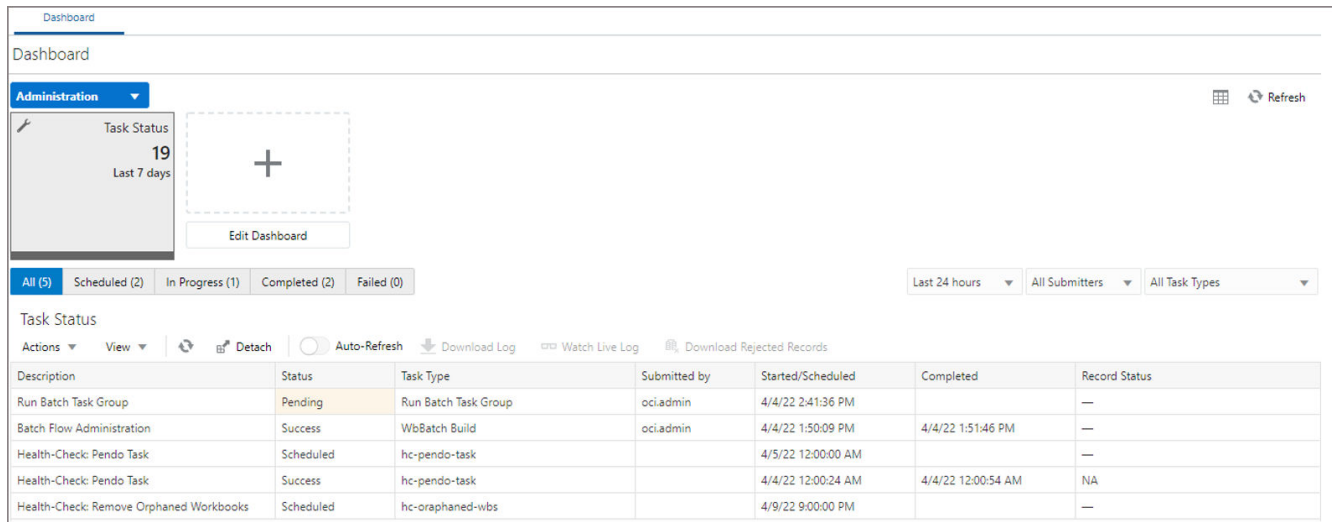
```
/planning/outgoing/logs/failure.13.eebatch_  
exec.setup.20190614043009.tar.gz
```

Dashboard

The Dashboard provides pre-configured dashboard profiles to the user once logged into the application. There are several profiles pre-configured for IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment. The Administration profile and the forecast profiles (Overview, Scorecard, Approval Alerts, Navigation Alerts) are default profiles and are always available. The Lifecycle profiles (Replenishment Overview, Replenishment Orders, Setup Exceptions, Replenishment Exceptions) are only available if Lifecycle Allocation and Replenishment is enabled.

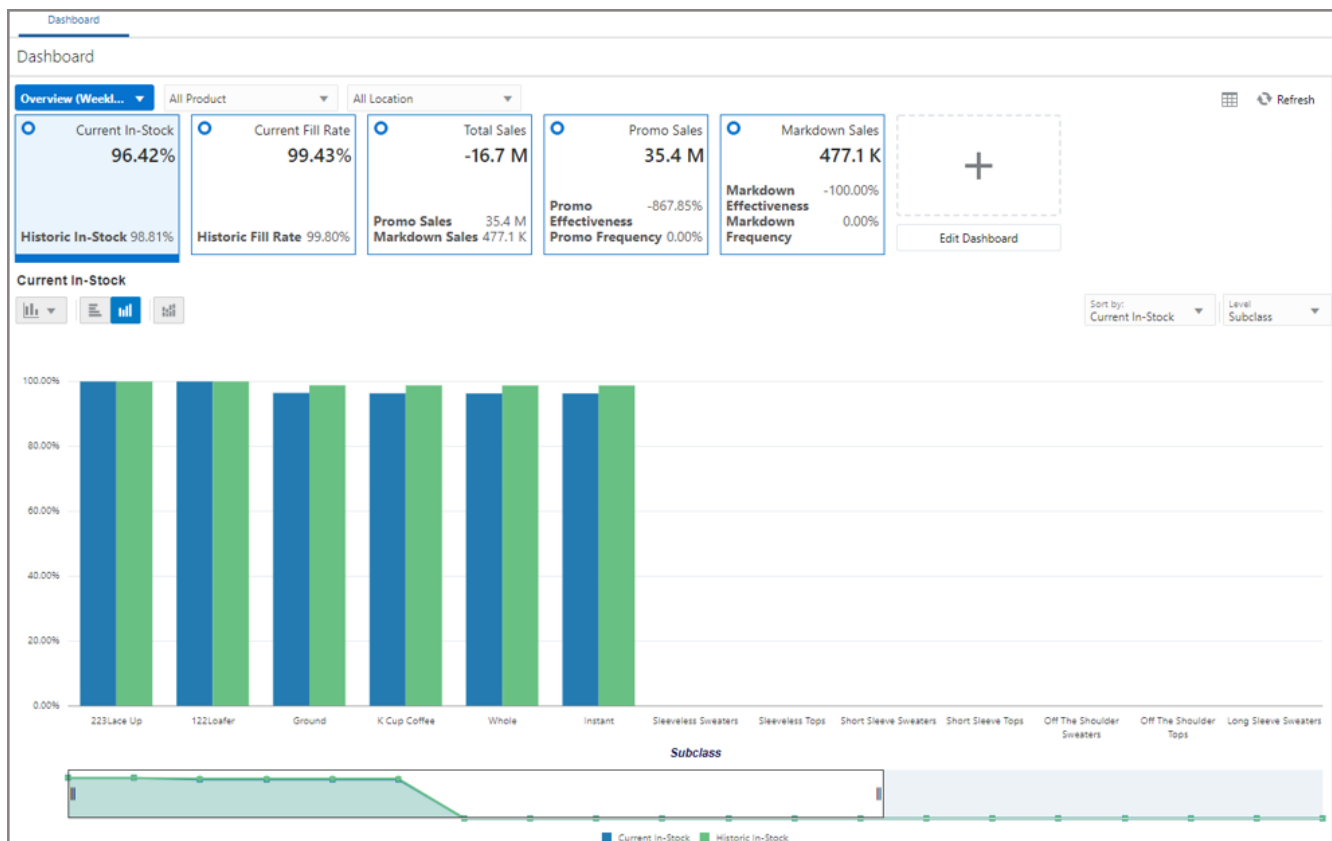
Administration (Task Status)

Figure 1-10 Dashboard - Administration



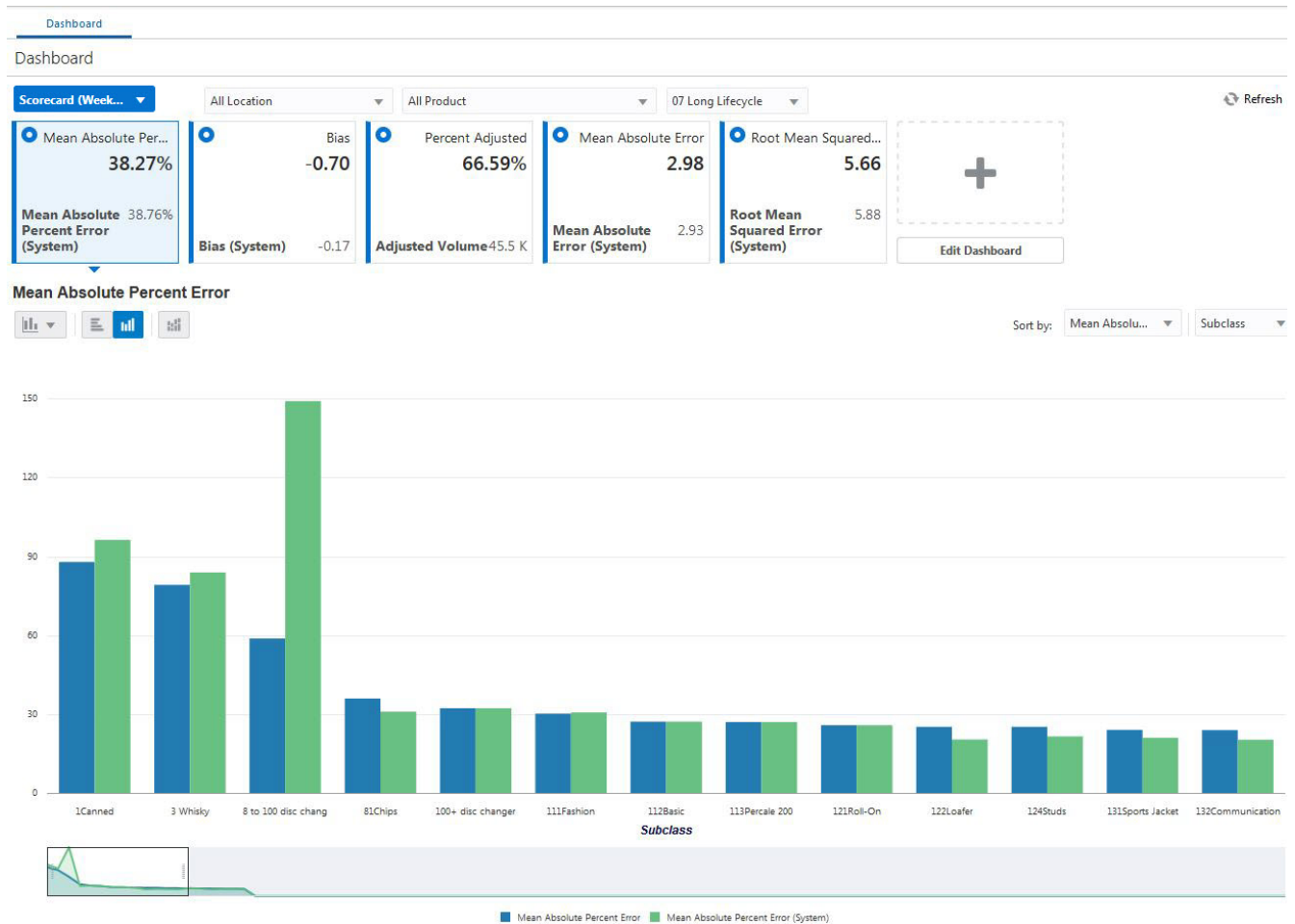
Overview (One per Final Level)

Figure 1-11 Dashboard - Overview



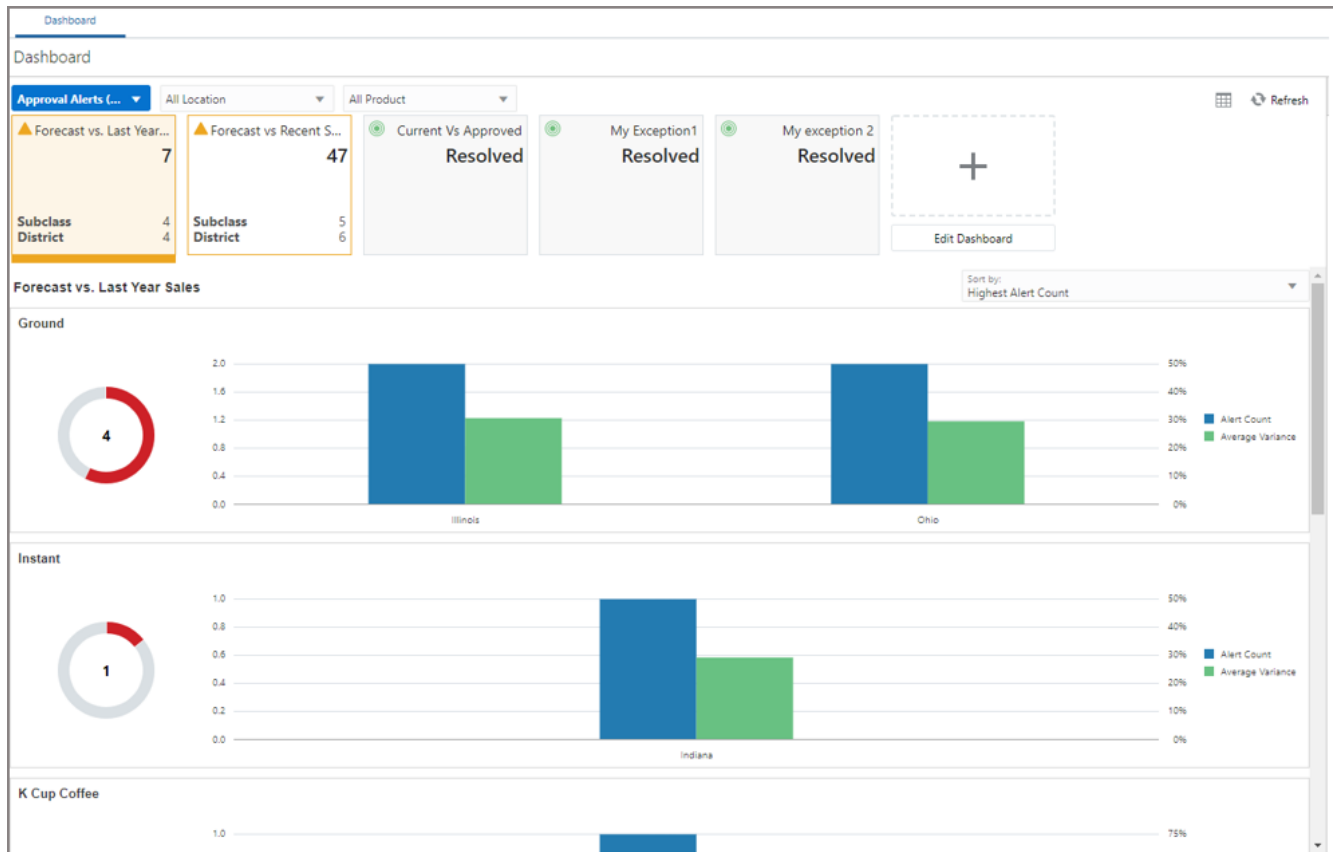
Scorecard (One per Final Level)

Figure 1-12 Dashboard - Scorecard



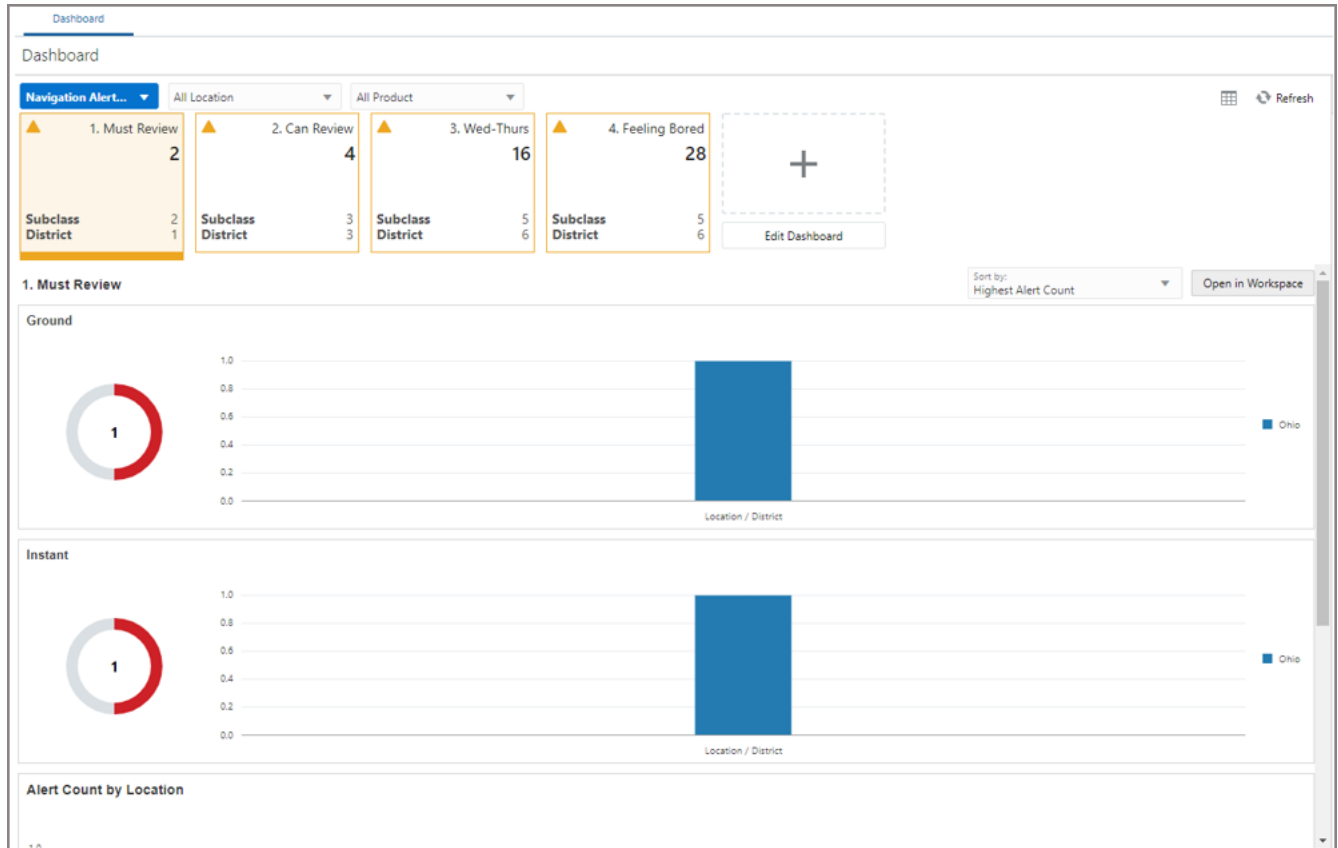
Approval Alerts (One per Final Level)

Figure 1-13 Dashboard - Approval Alerts



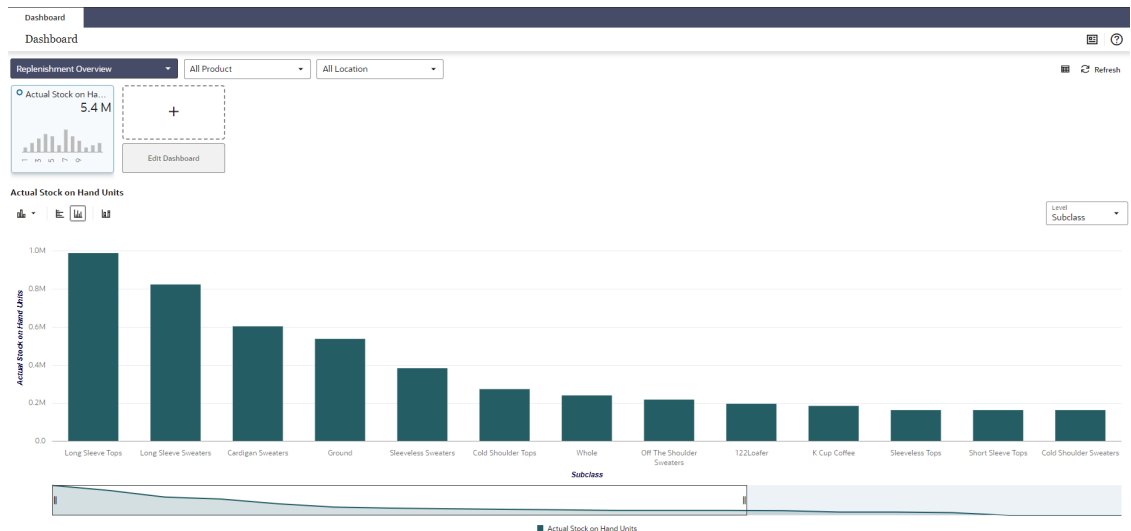
Navigation Alerts (One per Final Level)

Figure 1-14 Dashboard - Navigation Alerts



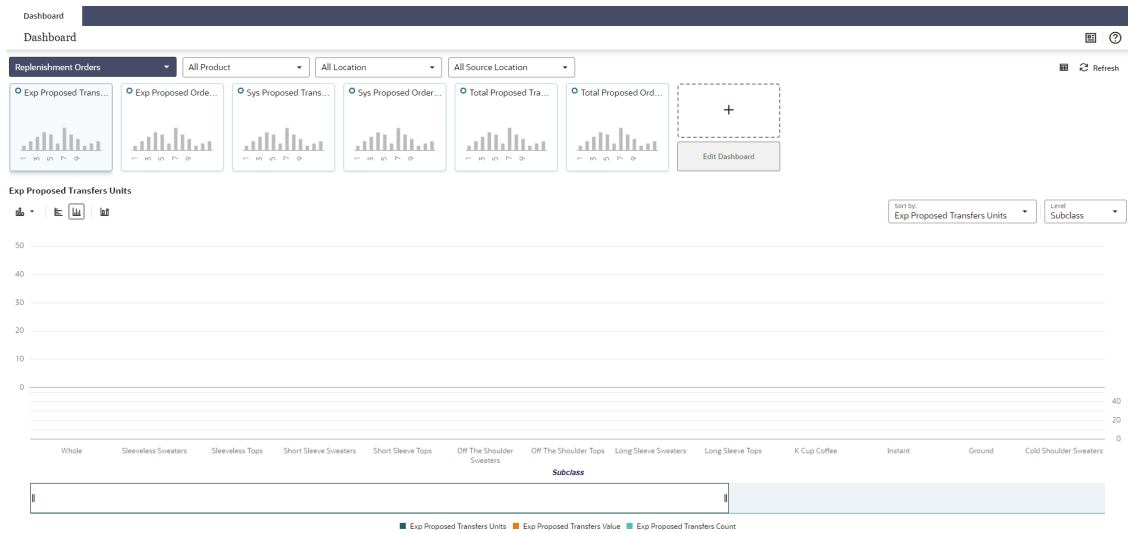
Replenishment Overview

Figure 1-15 Dashboard - Replenishment Overview



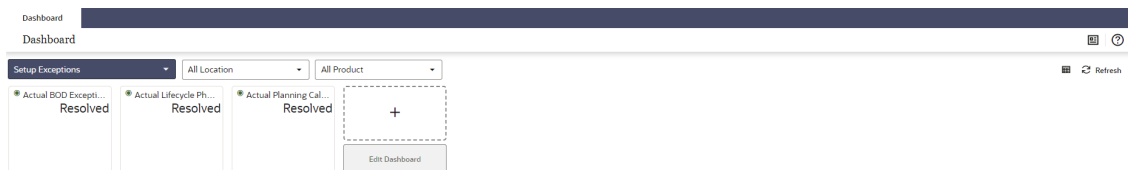
Replenishment Orders

Figure 1-16 Dashboard - Replenishment Orders



Setup Exceptions

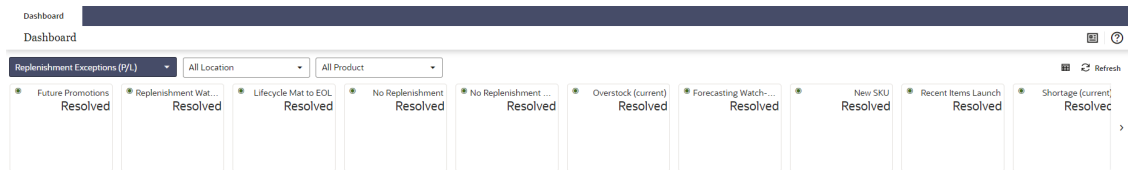
Figure 1-17 Dashboard - Setup Exceptions



All Exceptions are Resolved

Replenishment Exceptions (P/L) (Hit Count at SKU/Location)

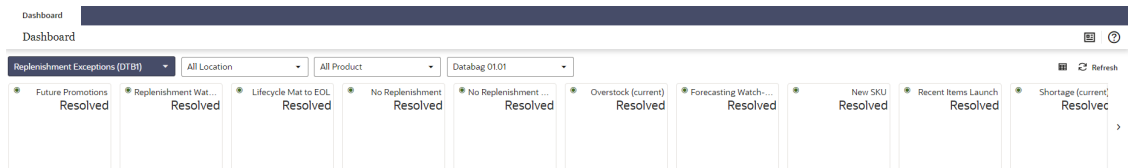
Figure 1-18 Dashboard - Replenishment Exceptions (P/L)



All Exceptions are Resolved

Replenishment Exceptions (DTB1) (Hit Count at Databag/SKU/Location Aggregated to Location)

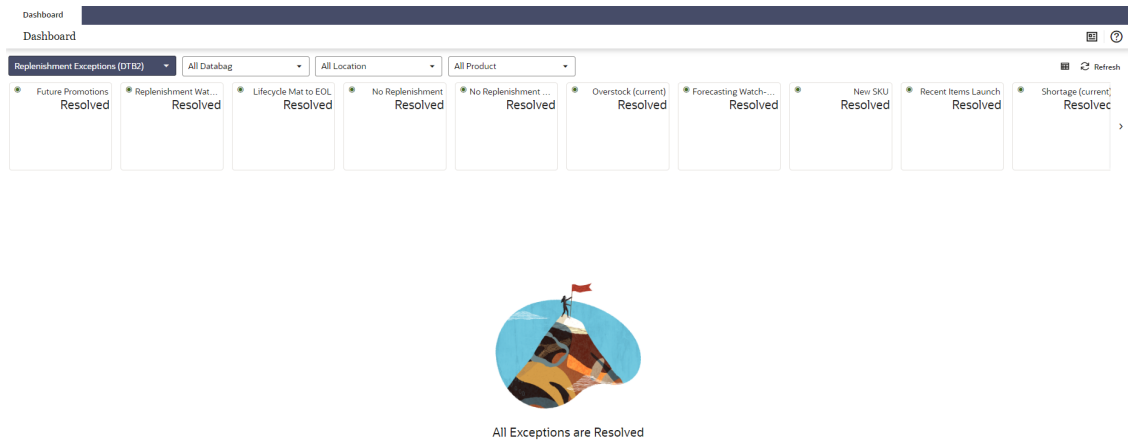
Figure 1-19 Dashboard - Replenishment Exceptions (DTB1)



All Exceptions are Resolved

Replenishment Exceptions (DTB2) (Hit Count at Databag/SKU/Location Aggregated to Databag)

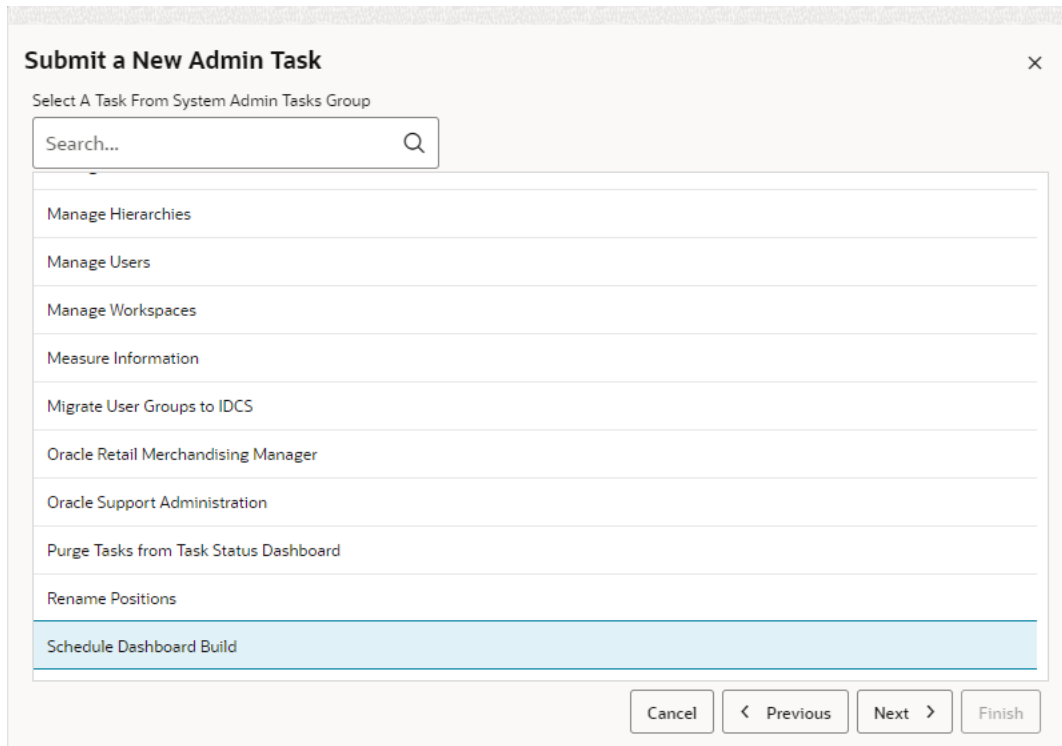
Figure 1-20 Dashboard - Replenishment Exceptions (DTB2)



Schedule Dashboard Task

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 build from the System Admin Tasks.

Figure 1-21 Schedule Dashboard Task



Submit a New Admin Task [X]

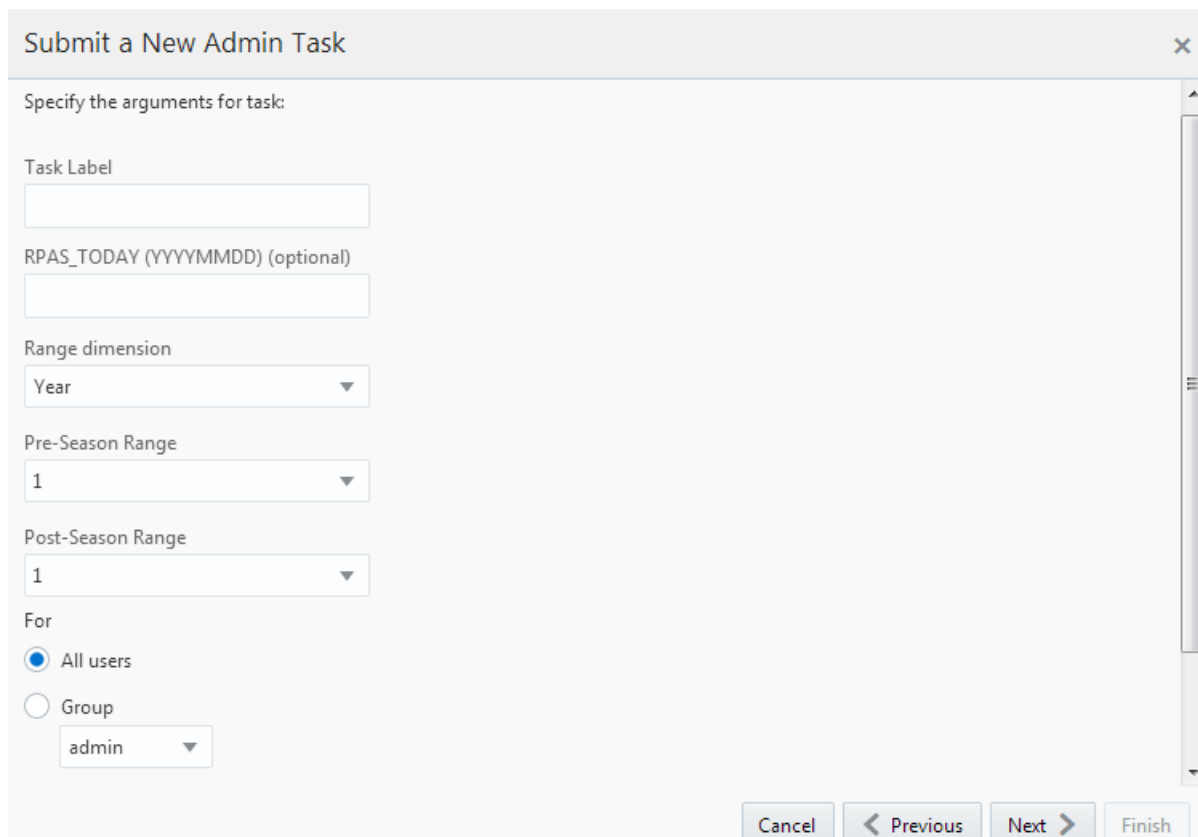
Select A Task From System Admin Tasks Group

Search...

- Manage Hierarchies
- Manage Users
- Manage Workspaces
- Measure Information
- Migrate User Groups to IDCS
- Oracle Retail Merchandising Manager
- Oracle Support Administration
- Purge Tasks from Task Status Dashboard
- Rename Positions
- Schedule Dashboard Build**

Cancel < Previous Next > Finish

Figure 1-22 Specify Arguments for Schedule Dashboard Workbooks Task



Submit a New Admin Task [X]

Specify the arguments for task:

Task Label

RPAS_TODAY (YYYYMMDD) (optional)

Range dimension

Year

Pre-Season Range

1

Post-Season Range

1

For

☒ All users

☐ Group

admin

Cancel < Previous Next > Finish

**Note:**

For IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment, all of the dashboard profiles are calendar-independent so Range Dimension, Pre-Season Range, and Post-Season Range are not relevant and the defaults can be used.

The following list describes the fields for the task:

- **Task Label** – Enter the name of the build task to review the status of build.
- **RPAS_TODAY** – Optional if we need to build dashboard as of some other day other than the current date.
- **Range dimension** – Calendar dimension against which the dashboard is pre-range.
- **Pre-Season Range** – Number of periods of Range dimension that needs to be included before `RPAS_TODAY`.
- **Post-Season Range** – Number of periods of Range dimension that needs to be included after `RPAS_TODAY`.
- **Users** – Select All Users or User Groups who can access that dashboard.

Retail Home

If Retail Home is configured, it provides a dashboard view of key configured metrics as tiles across multiple applications in the enterprise. IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment has the following tile states configured for Retail Home. These metrics are configured on the same dashboard templates. Hence, the regular dashboard segment needs to be built first, in order to see the Retail Home tiles. Retail Home uses a different set of JSON files to get the data from the dashboard segments into these tiles.

IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment has the following three tile states configured:

- [Current versus Historic In-Stock](#)
- [Sales versus Promotions](#)
- [Mean Absolute Percent Error](#)

Current versus Historic In-Stock

Metrics displayed in this tile state:

- Current In-Stock
- Historic In-Stock

Figure 1-23 Current versus Historic In-Stock Tile State



Sales versus Promotions

Metrics displayed in this tile state:

- Total Sales
- Promo Sales
- Markdown Sales

Figure 1-24 Sales versus Promotions Tile State



Mean Absolute Percent Error

Metrics displayed in this tile state:

- Mean Absolute Percent Error
- Mean Absolute Percent Error (System)

Figure 1-25 Mean Absolute Percent Error Tile State



2

Build/Patch Application

This chapter describes the process to build or patch an application including:

- [Self Service - Building the IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment Environment from the Bootstrap Environment](#)
- [Self Service - Patching the IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment Application](#)
- [Template Status](#)

Self Service - Building the IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment Environment from the Bootstrap Environment

This section describes the process of building IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment from the bootstrap environment with retailer data and generated configuration for the plug-in options. Once RPASCE and IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment are installed in the Oracle Cloud environment, the Administrator will have the option to overwrite and build 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 IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment environment is set up with a bootstrap configuration that allows the Administrator to log in and access the Online Administration Tools (OAT) interface before the application has been built. The bootstrap OAT configuration allows only tasks required to construct an application. Once the application has been constructed, the application tasks and the bootstrap activities both will be available. This allows the application to be rebuilt from scratch multiple times if needed.

Installation from the Bootstrap Environment

The following steps take you through the process of building a customer application for IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment using the bootstrap environment:

1. After installing IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment, log in to the bootstrap environment as an Administration user.
2. In the Tasks list, select **Administration** and then **Online Admin Tools**. Click **Submit a New Admin Task**. Select **Bootstrap Tasks**.
3. Select the **Build Application** task and click **Next**.

Figure 2-1 Select Build IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment Application Task

The screenshot shows a dialog box titled "Submit An Admin Task" with a close button (X) in the top right corner. Below the title bar, the text "Select A Task From Bootstrap Tasks Group" is displayed. A list box contains three items: "Build Application" (which is highlighted in blue), "Template Status", and "Unregister Application". At the bottom right of the dialog, there are three buttons: "Cancel", "Next >", and "Finish".

4. Set the arguments for the task:

Figure 2-2 Select Build Application Task Arguments

The screenshot shows the same "Submit An Admin Task" dialog box, but now it is on the "Specify the arguments for task:" screen. The "Task Label" field contains "Build Application". The "Partition Dimension" field contains "dept". There are three checked checkboxes: "Use GA Configuration with no extensibility?", "Use GA data?", and "Overwrite Existing Application?". Below these are two empty text input fields: "Set RPAS_TODAY in application" and "Batch Task Group to run after Application Build". At the bottom right, the buttons are "Cancel", "< Previous", "Next >", and "Finish".

- a. Enter the Task Label.
 - b. Partition Dimension is defaulted to `dept` dimension in for IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment. The application is 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 clear this box and upload the new configuration to the **Object Store**. If no configuration is found in **Object Store**, 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 Store**.
 - e. 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.
 - f. `RPAS_TODAY` is an optional parameter. It is needed only if the customer is planning to use the GA data set. For IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment GA data, the preferred `RPAS_TODAY` date is **20190331**.
 - g. Select the **Batch Task Group** to run after the Application Build. This is an optional parameter with the default value of `post_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.
 - h. After choosing all the necessary options, 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 2-3 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 main content area is titled "Schedule Task". It contains two radio buttons: "Run ASAP" (which is selected) and "Run on a schedule". Below the "Run on a schedule" option is a dropdown menu currently showing "One time". Underneath is a text field labeled "Server Start Date/Time:" containing the value "11/30/18 08:55 AM" and a small calendar icon. At the bottom right, there are four buttons: "Cancel", "< Previous", "Next >", and "Finish".

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

Figure 2-4 Verify and Confirm Selections

The screenshot shows a dialog box titled "Submit An Admin Task" with a close button (X) in the top right corner. The main content area is titled "Verify and Confirm Before Clicking Finish". It displays a summary of the task configuration in a list-like format:

- 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?**
- Overwrite Existing Application?**
- 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.
8. After the task is successfully completed, log out and then log in for changes to the task flow to appear.

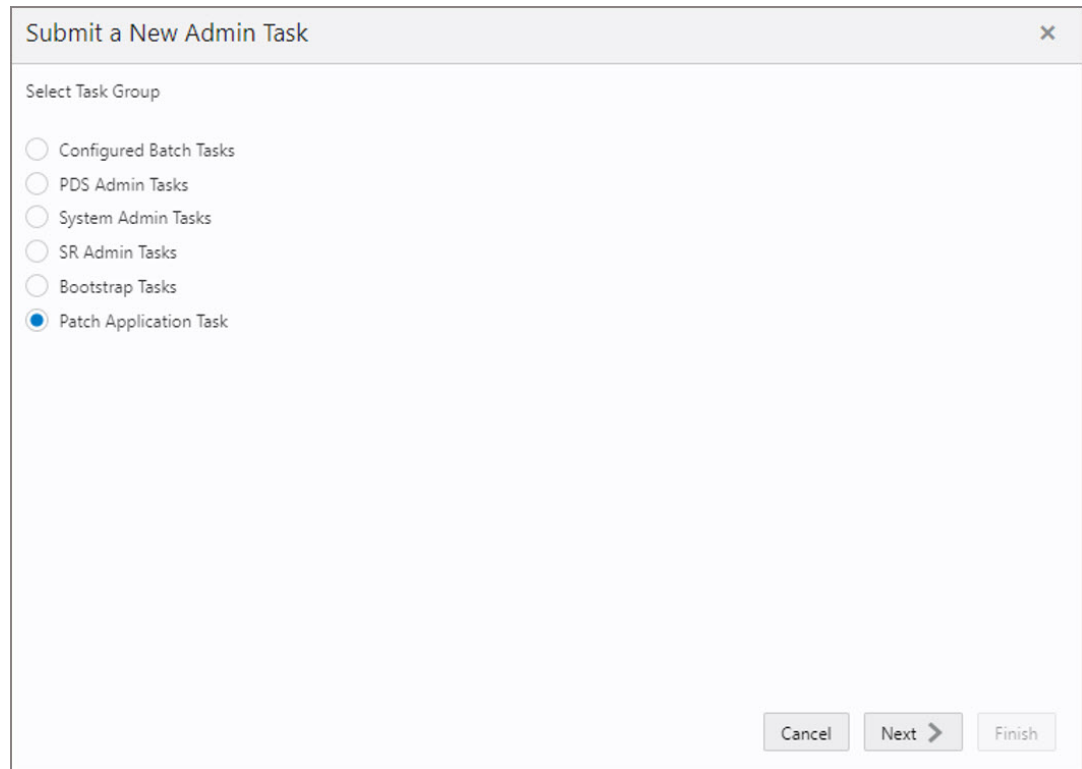
Self Service - Patching the IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment Application

This section describes the process of patching the IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment application using the Online Administration Tools. Once the RPASCE and IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment upgrade patches are installed in the Oracle Cloud environment, the IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment application will be patched by default with the latest configuration with the last used plug-in options. However, if the customer wants to reapply the patch with changes to the plug-in options, or with extensibility changes, the customer can use this task. Before scheduling this task, the Administrator should ensure that no users are logged in to the application while patching the solution.

The following steps walk you through the process to patch the IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment application as an Administration user:

1. After installing IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment, 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**.
3. Select **Patch Application Task** and then click **Next**.

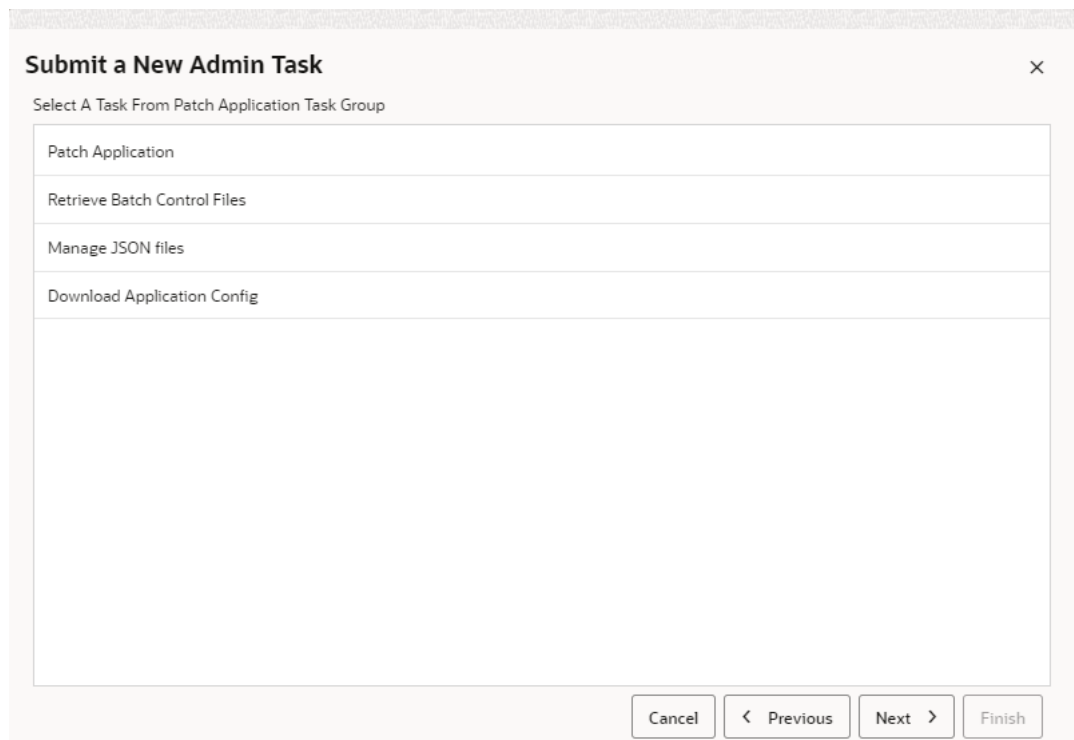
Figure 2-5 Select Patch Application Task



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 "Select Task Group" is displayed. There is a list of six radio button options: "Configured Batch Tasks", "PDS Admin Tasks", "System Admin Tasks", "SR Admin Tasks", "Bootstrap Tasks", and "Patch Application Task". The "Patch Application Task" option is selected, indicated by a blue dot. At the bottom right of the dialog, there are three buttons: "Cancel", "Next >", and "Finish".

4. Select **Patch Application** and set the arguments for the task:

Figure 2-6 Select Patch Application Arguments



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 "Select A Task From Patch Application Task Group" is displayed. There is a list of four tasks: "Patch Application", "Retrieve Batch Control Files", "Manage JSON files", and "Download Application Config". The "Patch Application" task is selected. Below the list, there is a large empty text area for arguments. At the bottom right of the dialog, there are four buttons: "Cancel", "< Previous", "Next >", and "Finish".

Figure 2-7 Select Patch IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment Domain Task Arguments

Submit a New Admin Task

Specify the arguments for task:

Task Label
Patch Application

Offline Mode Message

Log level

Cancel < Previous Next > Finish

- a. Enter the Task Label.
 - b. Enter the Offline Mode Message.
 - c. If patching with an updated customer configuration, ensure that the customer configuration has been previously uploaded to the Object Store
 - d. After choosing all the necessary options, 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 2-8 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". Underneath is a text field labeled "Server Start Date/Time:" containing the date and time "11/30/18 09:01 AM" and a calendar icon. At the bottom right, there are four buttons: "Cancel", "< Previous", "Next >", and "Finish".

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

Figure 2-9 Verify and Confirm Selections

The screenshot shows the same dialog box, but now on the "Verify and Confirm Before Clicking Finish" tab. The tab title is "Verify and Confirm Before Clicking Finish". The content area displays the following information:
Action
Submit An Admin Task
Task
Patch Application (Patch Application Task)
Description
Patch Application by applying updated Configuration
Label
Patch Application
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 IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment application when provisioned is deployed as a Template application with the Template status of **Activated**. This cannot be changed for IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment.

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 IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment 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 IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment application and assigned to the same user group. By default, all the roles as user groups will be added to the Application Domain. Only if not present will those user groups need to be added.

IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment is built with role-based access. Permissions are associated with roles. All roles, including for authorization and application administration, are described in the *Oracle Retail Identity Management for OCI IAM Startup Guide*.

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](#)

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 Inventory Planning Optimization Cloud Service-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment 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 IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment application.



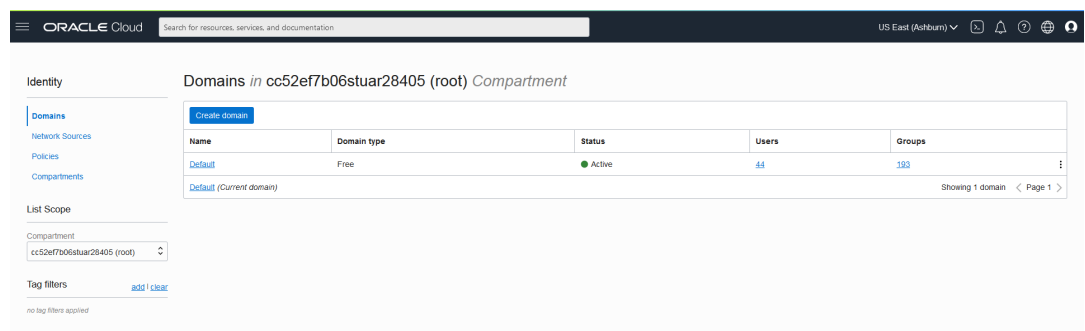
Note:

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:

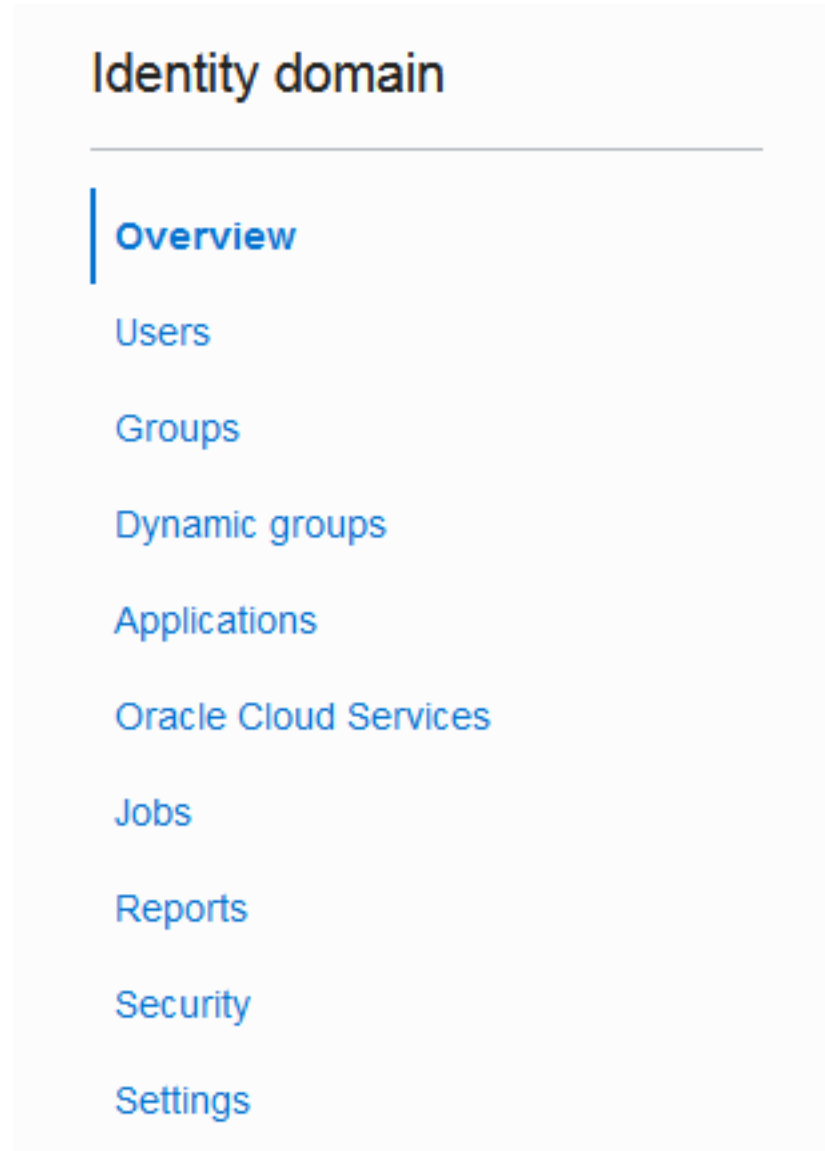
1. Log in to the OCI IAM application. The Domains view is shown by default.

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

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_PREPROD	Data Science Cloud Administration permission for Retailer using Innovation Workbench using APEX Workspace
☐	RETAIL_ASYNC_TASK_JOB_PREPROD	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**

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

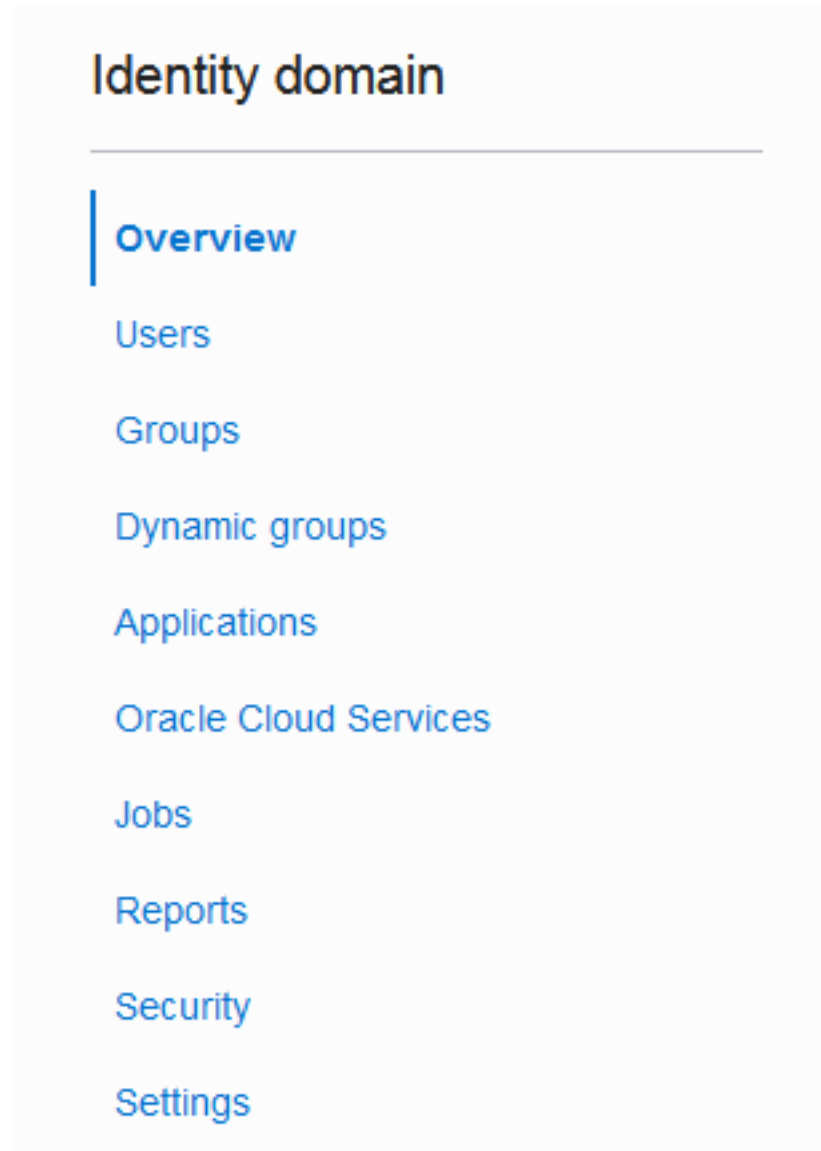
Managing Users in OCI IAM

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 IPOCS-Demand Forecasting / IPOCS-Lifecycle Allocation and Replenishment application. This keeps 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.