

# Oracle® Retail Invoice Matching Cloud Service

## Release Readiness



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ORACLE®

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# Preface

This guide outlines the information you need to know about Oracle Retail Invoice Matching Cloud Service new or improved functionality in this update, and describes any tasks you might need to perform for the update. Each section includes a brief description of the feature, the steps you need to take to enable or begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.

## **Audience**

This document is intended for the users and administrators of the Oracle Retail Invoice Matching Cloud Service.

## **Documentation Accessibility**

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- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

## **Oracle Help Center (docs.oracle.com)**

Oracle Retail Product documentation is available on the following website <https://docs.oracle.com/en/industries/retail/html>

## **Comments and Suggestions**

Please give us feedback about Oracle Retail Help and Guides. You can send an e-mail to: [retail-doc\\_us@oracle.com](mailto:retail-doc_us@oracle.com)

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### **Oracle Retail Cloud Services and Business Agility**

Oracle Retail Invoice Matching Cloud Service is hosted in the Oracle Cloud with the security features inherent to Oracle technology and a robust data center classification, providing significant uptime. The Oracle Cloud team is responsible for installing, monitoring, patching, and upgrading retail software.

Included in the service is continuous technical support, access to software feature enhancements, hardware upgrades, and disaster recovery. The Cloud Service model helps to free customer IT resources from the need to perform these tasks, giving retailers greater business agility to respond to changing technologies and to perform more value-added tasks focused on business processes and innovation.

Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

# 1

## Feature Summary

### Note:

Although this release has been branded as 19.2.000, it is based on the 19.2.001 service patch.

### Column Definitions

- **Feature:** Provides a description of the feature being delivered.
- **SR Number:** Identifies the SR number associated with the feature, if any.
- **Delivered:** Identifies whether the feature is Enabled or Disabled upon initial delivery.
- **Scale:** Identifies the size of the feature. Options are:
  - **Small:** These UI or Process-based features are typically comprised of minor field, validation, or program changes. therefore, the potential impact to users is minimal.
  - **Large:** These UI or process-based features have more complex designs. therefor, the potential impact to users is higher.
- **Customer Action Required:** You must take action before these features can be used. these features are delivered disabled and you choose if and when to enable them.

Feature	Delivered	Scale	Customer Action Required?
<a href="#">Invoice Matching Security Updates</a>	Disabled	Small	Yes

## Invoice Matching Security Updates

Several updates were made to the definition of duties and privileges with this update. For Invoice Matching, a new document upload duty was created for the existing upload documents privilege. This duty was then mapped to the appropriate roles instead of directly mapping the privilege to the roles. The tables below outline the new and updated privileges and duties added in the solution since the last update. Review the details of the duties and privileges and then follow the instructions outlined below to enable them in your implementation and add them to your user roles, as appropriate.

## New/Updated Duties

Title	New/ Update?	Base Role	Duty Description
UPLOAD_ DOCUMENTS_ DUTY	New	ACCOUNTS_PAYAB LE_MANAGER_JOB , ACCOUNTS_PAYAB LE_SPECIALIST_JO B, FINANCIAL_MANAG ER_JOB, REIM_APPLICATION _ADMINISTRATOR _JOB, REIM_DATA_STEW ARD_JOB	<p>A duty for uploading documents.</p> <p>This duty was created to contain the existing Upload Documents Privilege. As a standard we place all privileges in a duty and duties are then mapped to job roles. Previously the Upload Documents Privilege was directly mapped to job roles. Going forward this privilege will be contained in this new Upload Documents Duty and the Upload Documents Duty will be mapped to the appropriate job roles.</p> <p>This duty contains: UPLOAD_DOCUMENTS_PRI V</p>

**New/Updated Privileges**

Title	New/Update?	Parent Duty	Privilege Description
UPLOAD_DOCUMENTS_PRIV	Update	The mapping of this privilege has been removed from the following job roles: ACCOUNTS_PAYABLE_MANAGER_JOB, ACCOUNTS_PAYABLE_SPECIALIST_JOB, FINANCIAL_MANAGER_JOB, REIM_APPLICATION_ADMINISTRATOR_JOB, REIM_DATA_STEWARD_JOB	UPLOAD_DOCUMENTS_PRIV will no longer be directly mapped to job roles. The mapping of this privilege has been removed from the following job roles: ACCOUNTS_PAYABLE_MANAGER_JOB, ACCOUNTS_PAYABLE_SPECIALIST_JOB, FINANCIAL_MANAGER_JOB, REIM_APPLICATION_ADMINISTRATOR_JOB, REIM_DATA_STEWARD_JOB. Instead this privilege was added to a new Document Upload Duty and this duty will be mapped to these job roles.

**Customer Actions**

Based on these new/updated duties and privileges, the following actions are required in the order described below in order to enable the features. If this update doesn't contain changes related to one of the steps below, it can be skipped and you can move to the next one. For more information on the workflows used to support the actions described below, see the Merchandising Administration Guide.

**Step 1: Add New Duties**

For each of the new duties listed above, follow these steps:

1. Select Settings > Security > Role Mappings
2. Click the **Add** Button or select **Add** from the Actions Menu.
3. Add the first new duty, including the name, and optionally the description in the popup displayed. Then click **OK**.
4. Repeat for all new duties listed above.

**Step 2: Add New Duties to Roles**

Each of the new duties should then be added to the roles that require the access as defined in the privileges above.

1. Select Settings > Security > Role Mappings
2. Selecting a role that will be assigned one or more of the duties.
3. For each role, click **Select** and **Add** and then select the duties you want to add to the role using the popup.
4. Repeat for each role where you want to add the new duties.

### Step 3: Add Child Duties

For any new duty listed above that contains other duties, the child duty will also need to be mapped to the new duty using the below steps

1. Select Settings > Security > Role Mappings
2. Highlight the parent duty.
3. Click **Select** and **Add** and then select the duties you want to add to the role using the popup.
4. Repeat until you have added all child duties to the parent duties.

### Step 4: Synchronize privileges with New Duties

Each new duty needs to have its privileges synchronized.

1. Select Settings > Security > Policy Patching
2. Select **Sync** with patch.
3. Under the base Policies tab, working through the duties one at a time, select the check box next to each of the corresponding privileges.
4. Click **Copy to Custom** and then select the duty
5. Repeat until you have synchronized each duty.



#### Note:

The copy to Custom option does not clear the check boxes that you have selected, so be sure to de-select the check boxes after each duty.

### Step 5: Synchronize Modified Privileges

Each privilege that has had permissions changed from previous updates will need to be synchronized to update these permissions for the patch.

1. Select Settings > Security > Policy Patching
2. Select **Sync** with patch.
3. Under the base Policies tab, select the check box next to each of the corresponding privileges and click Sync.
4. Click **Copy to Custom** and then select the duty
5. Repeat for each privilege that has updated permissions.

# 2

## System Requirements, Supported Systems, and Compatibility

This chapter covers the Client System requirements and products supported for Oracle Retail Invoice Matching Cloud Service.

### Client System Requirements

The following technology is supported:

#### Browser Support

- Mozilla Firefox ESR 68+
- Internet Explorer 11
- Edge 44+
- Chrome (Desktop) 79+
- Safari 12+

### Supported Oracle Retail Merchandising Products

Product	Version
Oracle Retail Merchandising Foundation Cloud Service	19.2.000
Oracle Retail Pricing Cloud Service	19.2.000
Oracle Retail Allocation Cloud Service	19.2.000

### Supported Oracle Retail Integration on Premise Technologies

Integration Technology	Version
Oracle Retail Integration Bus (RIB)	19.2

### Supported Oracle Retail Integration Cloud Technologies

Integration Technology	Version
Oracle Retail Integration Cloud Service	19.0+

## Supported Oracle Applications

Requirement	Version
Oracle E-Business Suite Financials	12.2+
Oracle PeopleSoft Financials	9.2
Oracle Cloud Financials	Most Current Cloud Service Release