Oracle® Retail Order Orchestration Cloud Service

Administration Guide

Release 23.2.401.0
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Oracle Retail Order Orchestration Cloud Service Administration Guide, Release 23.2.401.0

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Contents

Preface

Oracle Retail Order Orchestration Cloud Service includes the following modules:

- Routing Engine: Distributed order broker that determines inventory availability across the enterprise, and uses advanced business rules to select locations that can fulfill orders.
- Supplier Direct Fulfillment: Web-based vendor portal enabling vendors to share purchase orders and shipping information to simplify drop shipment.
- Store Connect: Web portal that enables store associates to process and fulfill omni-channel orders.

Overview

This guide outlines the information you need to know about Order Orchestration 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.

We welcome your comments and suggestions to improve the content. Please send us your feedback at retail-doc_us@oracle.com.

Audience

This document is intended for the users and administrators of the Oracle Retail Order Orchestration Cloud Service.

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

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

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

Oracle Help Center (docs.oracle.com)

Oracle Retail product documentation is available on the Oracle Help Center at https://docs.oracle.com/en/industries/retail/index.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

Oracle Retail Cloud Services and Business Agility

Oracle Retail Order Orchestration 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 Pre-Provisioning

Pre-provisioning is the period after contracts are signed, but before receiving your environments, where some key activities can occur related to your upcoming implementation. For Order Orchestration Cloud Service implementations, your Customer Success Manager (CSM) will be your main point of contact for these activities.

> **Note:**
>
> For more information about how Oracle Retail applications undergo pre-provisioning and provisioning phases, see the Oracle Retail Identify Management for OCI IAM Startup Guide.

Activate Your Service into a Cloud Account

You will receive an activation e-mail from Oracle in the initial stages of provisioning — often immediately following your subscription order being booked. You will need to activate your cloud service into a cloud account in order to begin the provisioning activities for your Oracle Retail service(s). Promptly completing the activations steps will better enable on-time environment delivery.

On activation of your cloud account, you will have access to Oracle Cloud Infrastructure Console and the Identity and Access Management (OCI IAM) and your default Identity Domain will be created. An identity domain is a container for managing users and roles, federating and provisioning of users, securing application integration through Oracle Single Sign-On (SSO) configuration, and OAuth administration. It represents a user population in Oracle Cloud Infrastructure and its associated configurations and security settings (such as MFA).

Your default identity domain will be of the Oracle Apps type. Each identity domain type is associated with a different set of features and object limits.

Oracle Retail Best Practice for Tenancy, Applications, and Identity Domains

Oracle Retail recommends that all retail applications use the same OCI IAM Domain. All retail application environments must reside within the same OCI IAM domain for Single Sign-On (SSO) to function across production and non-production environments.

If the customer requires separating the identity management for production and non-production environments, the tenancies, domains, and application environments must be organized such that all production (prod) applications are in the same identity domain and all non-production (stage, dev, and so on) applications are in the same identity domain.

For Oracle Retail enterprise integration, the server-to-server security credentials required to flow among the Oracle Retail Applications (for example, Merchandise Foundation Cloud Service to Planning), the applications must reside in the same tenancy.

> **Note:**
>
> Activation of your cloud service into a cloud account does NOT impact billing or the subscription service period—these details are connected to the subsequent environment delivery of the Order Orchestration Cloud Service.

Creating an Oracle Cloud Account

To start the setup, you'll click the Activate link provided in the e-mail received. Then the following steps are required:

1. Provide the desired name for the Oracle Cloud Account.

   A best practice is to use a name which will encompass the scope of services to be managed in the account, such as a combination of your company name and "retail". For example, **mystoresretail**. After activation, you can adjust the displayed name for the cloud account.

2. Provide your e-mail address as the customer administrator who receives the activation e-mail.

   The e-mail address must match the initial e-mail. If you would like a different contact to be used as the administrator, this can be managed after activation in coordination with your CSM.

3. The activation success message will display, and you will receive a new welcome e-mail with access credentials.

[1]

Activating into an Existing Oracle Cloud Account

Activate your Retail cloud service within the Account Management section of your existing Oracle Cloud Account.

1. Log in to your existing Oracle Cloud Account.

   Clicking the **Activate** link brings you to the login page.

2. Within the Dashboard, click on the **Account Management** menu and then select the **Activate** tab.

   Available services to activate will be listed; you may need to select **Show: Pending Activations**.

3. Click the Cloud Service Account Setup button to complete setup. This setup will enable you to select the current Oracle Cloud Account as the destination for the cloud service activation.

If you have any issues with the above, see the *Frequently Asked Questions* chapter.

Prepare Project Team

During this time, you will also be putting together your project plan for the deployment and go-live phases of your implementation. It is important to consider the following during this planning phase to prepare your project team for implementation:

[1] Note: An Oracle Cloud Account is not the same as your My Oracle Support account. The Oracle Cloud Account exists within the OCI console and includes your identity domains for managing user access and identity.

- **OCI Identity & Access Management** - As noted above, you will be using OCI IAM UI for user management for Order Orchestration. During the pre-provisioning timeframe, familiarize yourself with this solution and its features.

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

- **Project Team Training** - Consider the training that the members of your team will need in order to make your implementation successful. This includes both your employees, as well as your systems integration partner. Suggested training topics to consider include Retail Integration Cloud Service configuration

- **Security Configurations** - During this phase, you should designate a portion of your team to becoming familiar with OCI IAM and the roles, duties, and privileges for Order Orchestration. You can also start designing the roles that you will need for your users, and what duties will be assigned to your custom roles. For more details, please refer to *Setting Up Data*.

2 Provisioning

Once your environments are ready for you, the person designated as your service administrator will receive a welcome e-mail: one for each cloud service and each environment (stage, production, and so on). This e-mail has several key pieces of information:

Follow all the instructions in the “Action Required: Access and Administer Production/State/Test Environment...” e-mail.

The environment access e-mail contains critical details required for you to access and administer your Cloud Service. You will receive one e-mail for each provisioned environment. Save these e-mails.

Log in to your Cloud Service. Use the Identity Management URL, username and temporary password provided the environment access e-mail to verify access to your service. At your first login attempt, create a new password and make note of it because at this point you are the only one with access!

You will receive a separate e-mail for each provisioned environment, and the password for each environment is maintained separately. In addition, please note that you will not be able to access the Retail applications until you grant the appropriate roles to your user profile.

It is recommended that you save this e-mail for future reference, because at this point the service administrator is the only person with access.

Access OCI IAM

Once you receive your welcome e-mail, it is recommended that you, as the system administrator, log into the OCI IAM console to verify your access and set a new password. You will also be assigned the application administrator group for both your production and pre-production environments. Note that the group for pre-production will have an added extension (_PREPROD) in order to differentiate between the two. These should not be deleted.

It is also recommended that you add additional administrators in order to have a backup administrator and share in user management administration, as at this point no one else in your organization will have access to OCI IAM or Order Orchestration. For assistance in creating users or adding them to groups, see *Setting Up Data* in this guide.

Validate Cloud Service Access

Next, you should validate that you are able to access and successfully log into Order Orchestration.

Register Customer Support Identifier

The welcome e-mail will also include your Customer Support Identifier (CSI). This should be registered with My Oracle Support (MOS), which you will use to log questions or issues about these services. Follow link in the e-mail or access support.oracle.com to create a new account. If you already have a MOS account, remember to add your new CSI to your existing MOS account.

The first person to request access to a CSI will be checked by Oracle to ensure the domain of their e-mail address matches the domain associated with the CSI. Once approved, they will be made the Customer User Administrator of that CSI, and can approve others to use it. If someone else has already been made the administrator of that CSI, then the request will be e-mailed to him or her for approval. For more information on the Customer User Administrator, see MOS ID 1544004.2.

> **Note:**
>
> You will not be able to register your CSI number until your production environment has been provisioned.

3
Frequently Asked Questions

Cloud Account Activation

Since Order Orchestration Cloud Service is installed using the default OCI IAM or IDCS domain details, it is important to ensure any activation concerns are resolved during the pre-provisioning/provisioning period, as making changes after Order Orchestration is provisioned may require extended downtime.

What should I do if I cannot activate my service into an existing Oracle Cloud Account? Inform your CSM or sales representative if you run into issues, providing the following information:

- Existing Oracle Cloud Account name
- Subscription ID of a service in the account
- Administrator e-mail for the account

What do I do if I experience errors or failures while attempting to activate my Cloud account? The administrator e-mail address must match the e-mail which received the activation notification. If this does match and you are still running into issues, inform your CSM or sales representative, providing the following information:

- Intended activation approach (new Oracle Cloud Account or activate within an existing)
- Any error or failure messages received—include screen shots if possible

Can I use another identity management solution? Only OCI IAM or IDCS are supported in Order Orchestration Cloud Service implementations, however OCI IAM or IDCS could also be integrated with external identity management providers, like Active Directory, using its APIs.

I have multiple pre-prod environments and want to have different security configurations for the same users/roles in each, can I do that? The recommended approach is to create roles in OCI IAM or IDCS that reflect the configuration needs for each environment. Or you could consider creating two user IDs for the same person to reflect the different role configurations that they need to test.

Why do I see other users in my OCI IAM or IDCS instance (for example, batchuser)? The Oracle Cloud Operations team will also seed a set of integration users required by the solutions as part of the provisioning process. These are users used for integration or internally for batch and other processing and **should not be deleted**.

I can see links in the task list, but why don't I see any links under the Settings task bar option? The links under the Settings icon require you to have the SETTINGS_MENU_DUTY associated with your group/role. If you aren't seeing these options, then that duty may be missing from the group/role you are assigned to. Validate your group/role assignment in OCI IAM or IDCS. If you are linked to the administrator group/role and are still not seeing the links, then you should log an SR for further assistance.

Why can I see links in the Settings task bar option, but not the Security link? The Security link under the Settings icon require you to have the ADMIN_CONSOLE_DUTY associated with your group/role. If you aren't seeing this option, then that duty may be missing from the group/role you are assigned to. Validate your group/role assignment in OCI

IAM or IDCS. If you are linked to the administrator group/role and are still not seeing the links, then you should log an SR for further assistance.

4
Setting Up Data

Purpose: Follow the steps below to set up data for the Routing Module as part of Order Orchestration Cloud Service installation. The Routing Module enables you to search for locations to fulfill orders, create orders across the enterprise, and track order activity.

Other setup steps and options: See the Online Help for more information on setting up data, including steps for configuration of the Routing Engine, as well as steps required for:

- Configuring the Supplier Direct Fulfillment module.
- Configuring the Store Connect module.
- Additional configuration options, such as probability rules and zone fulfillment.
- Testing operations, such as searching for locations and creating orders.
- Details on importing and exporting data, including additional import and export options.
- Changing the time zone for screens, reports, emails, and order update history.

Allow list: Retailers need to make sure that Oracle staff include all URLs, such as logos and those used for integrations, on the allow list for Order Orchestration Cloud Service. URLs that need to be on the allow list include:

- The *Logo URL* and *Shipper URL* (if not ADSI) at the **Drop Ship Preferences** screen.
- The *Logo URL*, *Logo URL (packing slip)*, *Shipper URL* (if not ADSI), and *Logo URL (email)* at the **Store Connect Preferences** screen.
- The *Logo URL* at the **New Brand** screen or the **Edit Brand** screen.
- The *Job Notification URL* at the **Event Logging** screen.
- The *URL* at the **Inventory Service** tab of the **System** screen.
- The *URL* in the **Outbound Orders Service** area of the **RICS Integration** tab of the **System** screen.
- The *Store Location URL*, *Warehouse Location URL*, *Products URL*, *Store Inventory URL*, and *Warehouse Inventory URL* at the **OCDS Integration** tab of the **System** screen.
- The *Tenant Logo* and the *Geocode Address* at the **Tenant** (retailer information) screen or the **Tenant-Admin** screen.
- The *Turn-by-Turn Distance URL* at the **Tenant-Admin** screen.

"From" email address: Set to no-reply@omni.retail.oracledomain.com, and can also include an alias, if one is specified as the *From Email Alias* at the *Event Logging* screen.

> **Important:**
>
> In this document, user details / company name / address / email / telephone number represent a fictitious sample. Any similarity to actual persons, living or dead, is purely coincidental and not intended in any manner.

Before You Start

Before you begin configuration of Order Orchestration Cloud Service you need:

- **URL:** The URL to use when logging into Order Orchestration.
- **Default user:** A default admin user profile for you to use when completing configuration in Order Orchestration, including creating additional users, configuring systems, setting preferences, and importing data.

Contact your Oracle representative for the user ID of the default admin user. This user needs to exist in both Order Orchestration and IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management).

You will need to assign the *Default Organization* to the user once you have completed these configuration steps below.

- New install: You need to create all users in IDCS or OCI IAM to map to all users in Order Orchestration, including Order Orchestration users, Store Connect users, vendor users, and web service users or clients. See Creating User Profiles for more information.
- Upgrade: You need to create all users in IDCS or OCI IAM before users can begin using Order Orchestration, including Order Orchestration users, Store Connect users, vendor users, and web service users or clients, if their records do not already exist in IDCS or OCI IAM. Users can use the *Can't sign in?* link at the login page to set their passwords.

See Creating User Profiles for more information on creating users.

Creating or Configuring an Organization

About organizations: The organization is the second level in the Order Orchestration Cloud Service hierarchy, below the tenant. All systems are assigned to a single organization, and item searching, order creation, and drop ship fulfillment takes place within the organization. You need at least one organization.

For more information: See the **Order Orchestration Routing Engine Overview**in the Online Help for a discussion of the organization hierarchy.

Default organization: A default organization is created in a newly provisioned Order Orchestration environment. The organization code and description is set to DEFAULT, and the locale is set to English United States. Optionally, you can use the Organizations screen in Modern View to change the locale.

You cannot delete the default organization if it is the only existing organization in your Order Orchestration environment.

Creating the Default System

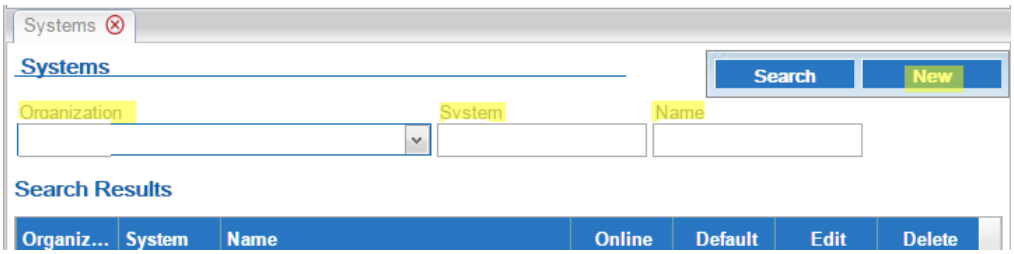
About systems: Each system in Order Orchestration Cloud Service represents an application, such as Oracle Retail Order Administration Cloud Service or Xstore, that shares inventory information via Order Orchestration Cloud Service and creates cross-channel orders or purchase orders.

About the default system: The default system identifies the application that is the system of record for product creation and naming. The first system created for your organization is automatically flagged as the default. System product codes in other systems are cross references to the products in the default system.

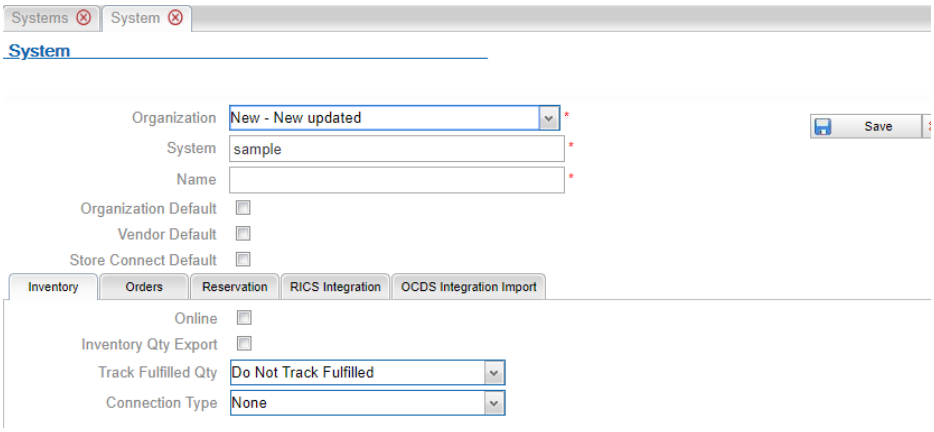
> **Note:**
>
> If you integrate with Order Administration, the system code should be the same as the company number, without padding zeros: for example, 6 rather than 006. Also, the code for the system must match the setting of the *OROB System (K50)* system control value.

> **Note:**
>
> The system flagged as the Vendor Default should not be the default system for the organization.

1. Select **Systems** > **Systems** to advance to the **Systems** screen.
2. At the **Systems** screen:
   - Select an organization from the *Organization* drop-down box.
   - Enter a system code in the *System* field. System codes can be 1 to 10 positions in length, can include spaces and special characters, and must be unique.
   - For Order Administration, the system code should be the same as the company number, without padding zeros.
   - Optionally, enter a name in the *Name* field. Names can be 1 to 40 positions in length and can include spaces and special characters. If you do not enter a name here, you need to enter it at the System screen when creating a system.



   - Click **New**.
     - If the system already exists in the organization, or if you did not select an organization or enter a *System* code, Order Orchestration displays an error message;
     - Otherwise, you advance to the **System** screen, where you can complete the creation of the system.



> **Note:**
>
> If you click **Cancel** at the **System** screen after clicking **New**, the system is not created.

> **Note:**
>
> The *Organization Default* flag is selected when you create the first system for an organization, and the flag cannot be unselected at this time. To designate a different system as the default, you need to create another system and flag that system as the default; this unflags the first system.

Order Administration integration: The code for the Order Administration must match the setting of the *OROB System (K50)* or *Locate System (K50)* system control value. However, names for systems do not need to be the same as the Order Administration company descriptions.

For more information: See the **System** screen in the Online Help for information on additional system configuration options.

Creating Each Additional System that will Integrate with Order Orchestration Cloud Service

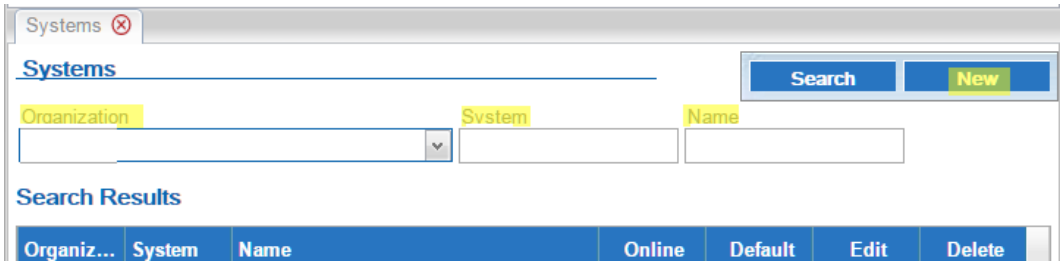
Follow the steps below to create:

- A default vendor system, if you will use the Supplier Direct Fulfillment module.

  > **Note:**
  >
  > The system flagged as the Vendor Default should not be the default system for the organization.

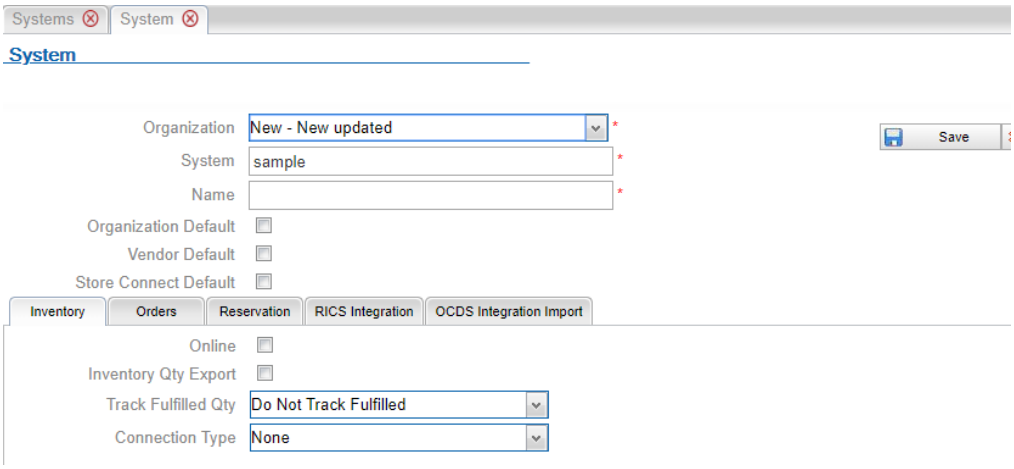
- The Store Connect system, if you will use the Store Connect module.
- Each additional system, such as a POS system.

1. Select **Systems** > **System**.
2. At the **Systems** screen select your organization from the *Organization* drop-down box.



> **Note:**
>
> When creating the Store Connect system, you should not use a system code that begins with STC-, as these characters are used as part of the name for the user group in IDCS or OCI IAM. You can use STC_ (with an underscore rather than a hyphen) instead.

3. Enter a system code in the *System* field. System codes can be 1 to 10 positions in length, can include spaces and special characters, and must be unique.
4. Enter a name in the *Name* field. Names can be 1 to 40 positions in length and can include spaces and special characters. If you do not enter a name here, you need to enter it at the System screen when creating a system.
5. Select **New**:
   - If the system already exists in the organization, or if you did not select an organization or enter a *System* code, Order Orchestration displays an error message;
   - Otherwise, you advance to the **System** screen, where you can complete the creation of the system.



6. Select **Save**.

> **Note:**
>
> If you select **Cancel** at the **System** screen without first selecting **Save**, the system is not created.

See the **System** screen in the Online Help for information on the fields and options available at this screen.

Creating User Profiles

This section consists of two main subjects:

- Before You Start: Background on IDCS or OCI IAM Integration: provides an overview.
- IDCS or OCI IAM User Synchronization: provides information on the required setup and the steps you use to create different types of users in Order Orchestration based on the information received from IDCS or OCI IAM.

Before You Start: Background on IDCS or OCI IAM Integration

Background on user mapping with IDCS or OCI IAM and user setup:

- Authentication for all users takes place using the password defined for the user in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management); however, if OAuth authentication is enabled, the user ID defined in Order Orchestration for a Web Service user maps to a client ID defined in IDCS or OCI IAM, and IDCS or OCI IAM defines a token for web service authentication, rather than a password.

  About OAuth: OAuth is a standard for web service authentication through the use of access tokens rather than passwords.
- Role assignments in Order Orchestration control the user's screen and feature authority at Order Orchestration, Store Connect, and Vendor Portal screens. You can change the role assignments for existing users through the **Roles** screen. See *Roles* in the online help for more information.
- No role authority is required for web service users.
- Since Order Orchestration requires a lower case user ID, you should create lower case user IDs in IDCS or OCI IAM for validation into Order Orchestration.
- An Order Orchestration or Store Connect user is assigned the locale defined in IDCS or OCI IAM if the locale matches an existing locale in Order Orchestration. If a supported locale is not assigned to the user in IDCS or OCI IAM, Order Orchestration assigns a locale of English-United States (en_US). **Note:**
  - The list of supported locales is available for review at the Add Organization or Edit Organization window from the Organizations screen.
  - In most cases, when setting the preferred language in IDCS or OCI IAM, you should select the option that includes both the language and the country, such as English US, to map correctly when creating the user in Order Orchestration.

However, Japanese, Russian, and Swedish will map correctly without a country specified.

- When the user logs into Order Orchestration or Store Connect, the user ID entered at the login screen must match the user ID in IDCS or OCI IAM. If the user ID in IDCS or OCI IAM is the Cloud Service User ID, then the user enters the Cloud Service User ID at the login screen.
- User ID matching is case-sensitive, whether through the Order Orchestration user ID or the Cloud Service User ID.
- Order Orchestration, Store Connect, and vendor users can use the *Can't sign in?* link at the login page to reset their passwords.

Multiple omnichannel systems: You can use the same IDCS or OCI IAM user records for multiple omnichannel systems. You can use the Cloud Service User ID as a cross-reference to Order Orchestration users and Store Connect users, but this option is not available for Vendor Portal users or web service users. You can also use the same user ID for any user type, except that Order Orchestration requires a lowercase user ID, as noted above.

Although Order Administration uses an uppercase user ID, user validation is not case-sensitive, so a lowercase user ID from IDCS or OCI IAM passes validation.

Authentication for outbound web service requests: Use IDCS or OCI IAM to set up users for the authentication of web service requests across omnichannel systems, such as Order Administration System Cloud Service or Customer Engagement Cloud Services if the omnichannel systems use the same instance of IDCS or OCI IAM.

IDCS or OCI IAM User Synchronization

About identity cloud service user synchronization: Use IDCS or OCI IAM to create users for omnichannel applications, including Order Orchestration Cloud Service and Oracle Retail Order Management System Cloud Service. Users that exist in IDCS or OCI IAM and are configured there for Order Orchestration Cloud Service access are then created in Order Orchestration Cloud Service:

- Through the **Identity Cloud User Synchronization** job, available through the **Schedule Jobs** screen, or,
- Automatically, when the user logs into Order Orchestration Cloud Service.

> **Note:**
>
> If a user exists in IDCS or OCI IAM for another application but has not been configured for Order Orchestration access, the user will not be able to log into Order Orchestration. Instead, the user advances to the Unauthorized Access screen. If the user requests and is granted access to Order Orchestration while still at this screen, they can use the **Retry** option to log into Order Orchestration.

Users are created in Order Orchestration Cloud Service with the default authority defined from IDCS or OCI IAM, described below.

If you need to create Store Associate users and/or Vendor users in addition to Order Orchestration Cloud Service users, see Creating Vendor Users or Creating Store Associate Users, below.

The **Identity Cloud User Synchronization** job does not delete, deactivate, or update authority for any user records, including vendor users and store associates, in Order Orchestration Cloud Service. Use the related screen in Order Orchestration Cloud Service to update users once they have been created.

Web service authentication: The **Identity Cloud User Synchronization** job does not create web service users. See Setting up Web Service Authentication for information on creating web service users.

Required Setup for IDCS or OCI IAM User Synchronization

The following steps describe creating Order Orchestration Cloud Service (retailer) user profiles.

About the default user: The `default` user is created automatically, with a user name of Identity Cloud Default User. This is not an actual user record that can log into Order Orchestration Cloud Service; instead, it serves as a template for creating actual users. You cannot delete the `default` user.

Configuring the default user: Before creating additional, actual users, update the `default` user with the settings to apply to actual users when they are created in Order Orchestration Cloud Service:

- Role assignments without the *Vendor User Role* flag selected through the **Roles** screen, controlling the default authority to Order Orchestration Cloud Service screens. See the *Roles* screen in the online help for more information.
- The *Default Organizatoin* that controls system product code to display as the **Item #** at the **Order** screen, as well as the organization to default at other screens.

Multiple groups of users: You can modify the configuration of the `default` user if you will import multiple groups of users into Order Orchestration Cloud Service. For example, you could first configure the `default` user with just order inquiry and maintenance authority, import a group of users, and then reconfigure the `default` user with different authority for the next group of users.

User Creation in IDCS or OCI IAM

You can use the following process in IDCS or OCI IAM to create users and control their attributes through group assignment, using the application record in IDCS or OCI IAM for Order Orchestration Cloud Service. The application record typically has a *Name* such as `RGBU_OBCS_<ENV>_APPID`, where `ENV` represents the environment.

- Create one or more groups to use for assignment of roles to users. For example, create an ob_users group to use for creation of regular users, and an ob_admin group to use for creation of admin users. Assign the group to the appropriate application role in IDCS or OCI IAM: either OBCS_Admin or OBCS_User.

  > **Note:**
  >
  > Users might not be able to see the Modern View options if they are not assigned the OBCS_User role or the OBCS_Admin role.

- Create each user in IDCS or OCI IAM, specifying the user's first name, last name, user name, and email address.

About defining the user in IDCS or OCI IAM:

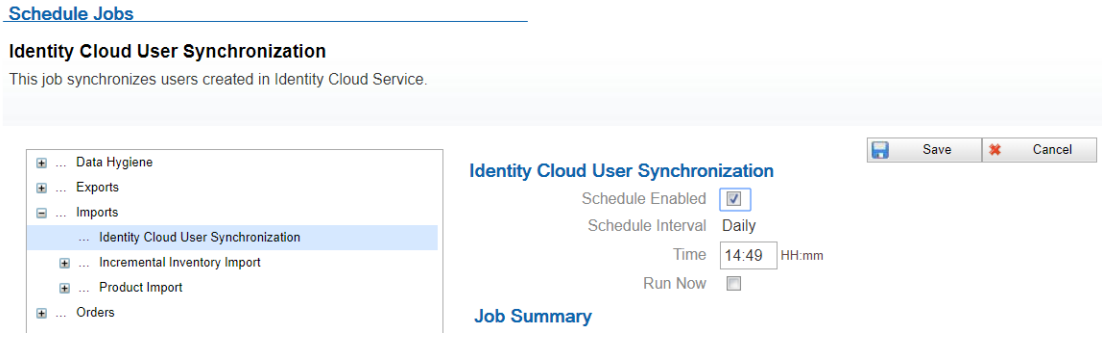
– The user name be lower case and cannot be more than 256 positions.

  * Assign each created user to the appropriate group.
  * Assign each group to the Order Orchestration application in IDCS or OCI IAM.
  * Assign each user to the appropriate application role in IDCS or OCI IAM.
  * Assign or reset the password for each user in IDCS or OCI IAM. This triggers an email to the email address specified for the user, who can log in using either the user name defined in IDCS or OCI IAM if it does not exceed 10 positions, or the email address.

> **Note:**
>
> If the user logs in after configuration in IDCS or OCI IAM, this creates the user record in Order Orchestration Cloud Service; otherwise, the record is created through the import job, described below.

Importing Users through the IDCS User Synchronization Job

After completing the required setup describe above, Select **Systems** > **Schedule Jobs** and run the **Identity Cloud User Synchronization** job to import the new users from IDCS or OCI IAM.



Each new user is created in Order Orchestration with the application role assignments from IDCS or OCI IAM:

- The user ID, name, email address, and cloud service user ID are from IDCS or OCI IAM; however, if the user ID is longer than 10 positions or is a duplicate of an existing user ID of 10 positions, it is truncated as described above.
- The admin flag is selected if the user is assigned to the OBCS_Admin application role in IDCS or OCI IAM.
- The role-based authority is from the `default` user's current settings.

After creation: Once users are created in Order Orchestration, you can maintain them; for example, you can change the email address, date formats, user name, authority, and default shipping system for Order Orchestration users, and you can flag a user as inactive so that the user cannot log in; however, this does not update the user's record in IDCS or OCI IAM. You

can also delete the users from Order Orchestration, although this does not delete the corresponding records in IDCS or OCI IAM, and the user would be created again in Order Orchestration Cloud Service the next time the synchronization job runs.

> **Note:**
>
> The synchronization job does not update existing users in Order Orchestration.

Creating Vendor Users

If you also need to create vendor users in Order Orchestration, use the following process:

- In Order Orchestration, create one or more vendors. See the **Vendors** screen in the online help for more information.
- In Order Orchestration, create one or more roles with the *Vendor* role type selected, controlling the default authority to Vendor Portal screens. Select the *Default Vendor Role for Vendor User* flag at the Role Details tab from the **Roles** screen.
- In Order Orchestration, run the **Identity Cloud User Synchronization** job to create the vendor user groups in IDCS or OCI IAM corresponding to each vendor created in Order Orchestration. The vendor user group is created as <system>|<vendor>, where <system> is the system code identifying the default vendor system, and <vendor> is the code identifying the vendor. The synchronization job performs this creation in IDCS or OCI IAM each time it runs based on the existing roles in Order Orchestration. The vendor user group is created as <system>|<vendor>, where <system> is the system code identifying the default vendor system, and <vendor> is the code identifying the vendor, and then the group is assigned to the role.

  > **Note:**
  >
  > In the case of a failure, you may need to assign the group to the role manually.

- In IDCS or OCI IAM, create each vendor user and assign it to the vendor user group associated with the same vendor. See User Creation in IDCS or OCI IAM for background on creating the user in IDCS or OCI IAM and notes about defining the user name.

  > **Note:**
  >
  > Assign the vendor user only to the vendor user group associated with the correct vendor. Order Orchestration does not support assigning a vendor user to more than one vendor.

- Run the **Identity Cloud User Synchronization** job again to import new vendor users from IDCS or OCI IAM. The vendor users are assigned role-based authority based on the vendor role type set up through the **Roles** with the *Default Vendor Role for Vendor User* flag selected.

> **Note:**
>
> The synchronization job does not update existing vendor users in Order Orchestration.

Creating Store Associate Users

If you also need to create store associate users in Order Orchestration, use the following process.

- In Order Orchestration, create the default Store Connect system for your organization. See the **Systems** screen in the online help for more information.
- In Order Orchestration, run the **Identity Cloud User Synchronization** job to create store user groups in IDCS or OCI IAM for each system that is flagged as the Store Connect default for an organization. The user group is named STC-SYSTEM, where SYSTEM is the system code of the Store Connect default system in your organization. The synchronization job performs this creation in IDCS or OCI IAM each time it runs based on the existing roles in Order Orchestration.
- In IDCS or OCI IAM, assign each store user group to the OBCS_Store_User role. Order Orchestration then sends a request to add each Store Connect group to the OBCS_Store_User role in IDCS or OCI IAM.

> **Note:**
>
> In the case of a failure, you may need to assign the group to the role manually.

- In IDCS or OCI IAM, create each store associate user and assign it to the store user group associated with the appropriate system. See User Creation in IDCS or OCI IAM for background on creating the user in IDCS or OCI IAM and notes about defining the user name.
- In Order Orchestration, run the **Identity Cloud User Synchronization** job again to import new store associate users from IDCS or OCI IAM.
- Use the **Users** screen to finish configuration of the store associate user, including assigning one or more locations and flagging the user as active. The *Store Connect* tab is highlighted with an alert icon ( )if the user has not been assigned any Store Connect locations.

  If a user was not previously assigned Store Connect access, the access is assigned once the user is assigned at least one Store Connect location through the Users screen, and the OBCS_Store_User role is assigned in IDCS or OCI IAM.

> **Note:**
>
> The synchronization job does not update existing store associate users in Order Orchestration.

> **Note:**
>
> When you make any changes in IDCS or OCI IAM to an existing store associate's user role, the changes do not take effect until the user next logs in. For example, if the associate is currently logged into Store Connect and you remove the OBCS_Store_User role, the associate can continue working in the current, open session.

Scheduling the Identity Cloud User Synchronization Job

At the **Schedule Jobs** screen, schedule the **Identity Cloud User Synchronization** job to run daily.

Assigning the Default Organization to the Admin User Profile

Follow the steps above under Creating User Profiles to assign the *Default Organization* to the Admin user. The *Default Organization* assigned to a user indicates the system product code to display on Order Orchestration screens.

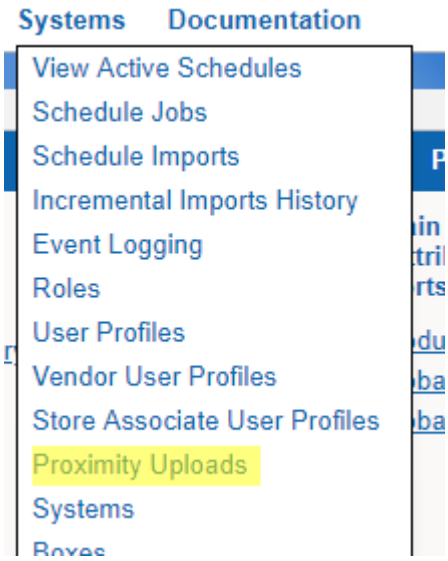
Uploading Proximity Data

About proximity data: Proximity data enables you to search for merchandise or assign orders based on the approximate distance from a store, warehouse, or customer address.

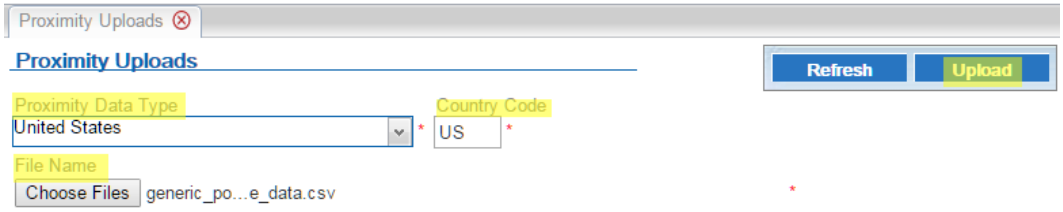
> **Note:**
>
> This step is required only if you are using proximity locator searching for locations through the Routing Engine, and only if you are not using the Oracle Maps Cloud Service. You can also perform this step at a later time.

If you are using Proximity Locator searching to restrict locate items searches or order assignment based on geographical location, and if you are not using the Oracle Maps Cloud Service, obtain the required `.CSV` file of postal code information before you begin the upload:

1. Select **Systems** > **Proximity Uploads**.



2. At the **Proximity Uploads** screen:
   - Select **Canada**, **International**, or **United States** from the *Proximity Data Type* drop-down list.
   - Enter the *Country Code* to apply to proximity records.
   - Use the **Choose Files...** button below the *File Name* field to select the `.CSV` file on your local computer.
   - Select **Upload**.



3. Wait until the upload status is completed. Optionally, you can select **Refresh** to check the status.

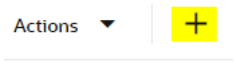
For more information: See the **Proximity Uploads** screen in the Online Help for more information, including the file layout and troubleshooting. Also, see the **Order Orchestration Routing Engine Overview** in the Online Help or the Web Services Guide on MOS (2953017.1) for a discussion of proximity locator searching and preferences, including the use of the Oracle Maps Cloud Service.

Creating Location Types

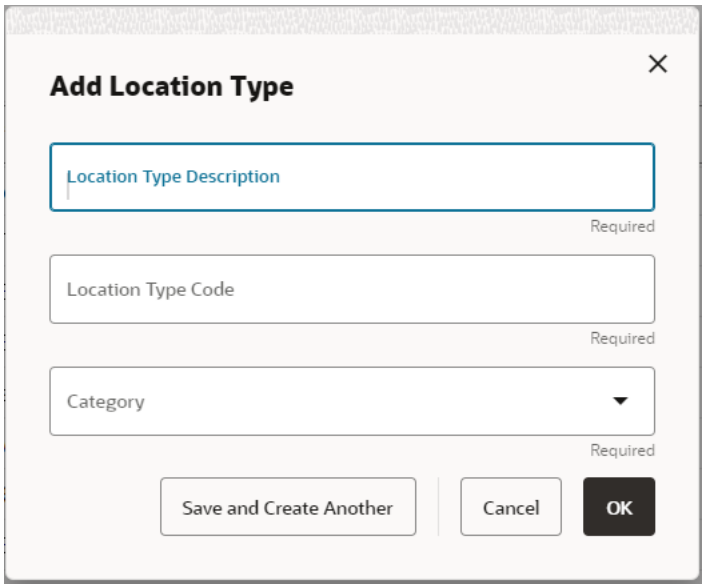
About location types: Location types identify a group of locations based on the system to which they belong, such as your order management system or your POS system, as well as their function, such as distribution center or retail store.

At least one location type is required for you to create locations.

1. Select your organization from the top of the Modern View home screen, if necessary.
2. Select **Location Types** in Modern View to advance to the Location Types screen.
3. At the Location Types screen, select Add:



The Add Location Type window opens.



4. In the Add Location Type window, enter the location type description, code, and category (
   - The description. The description can be from 1 to 40 positions long and can include spaces and special characters.
   - The code. The location type code can be 1 to 10 positions long, can include spaces and special characters, and must be unique within the organization; however, other organizations can have the same location type code.
   - Select the location category. Possible categories are Store or Warehouse.
5. Select **OK** or select **Save and Create Another**.

Setting up a Default Carrier and, Optionally, Additional Carriers

About carriers: A carrier is required on each order. At a minimum you need to set up a default carrier, specified at the **Preferences** screen.

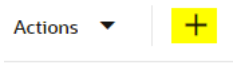
If the Submit Order message creating a delivery or ship-for-pickup order:

- specifies a `ship_via` that matches a carrier you have set up through the **Carriers** screen, Order Orchestration Cloud Service uses this carrier on the order and resets the carrier as active, if needed.
- specifies a `ship_via` that does not match a carrier you have set up through the **Carriers** screen, Order Orchestration Cloud Service creates the carrier and uses this carrier on the order.
- does not specify a `ship_via`, Order Orchestration Cloud Service uses the default carrier you specify at the **Preferences** screen.

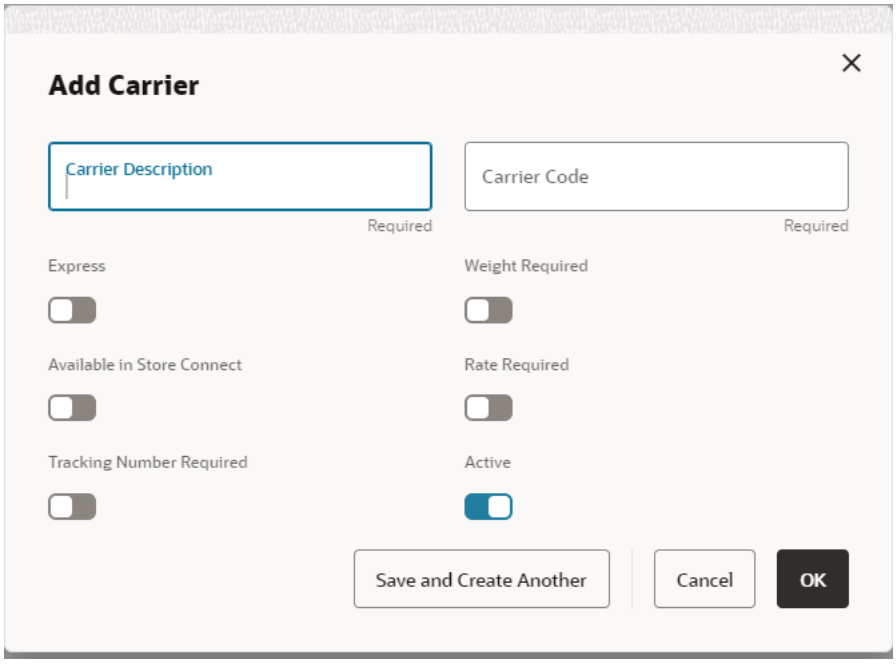
For a pickup order, Order Orchestration Cloud Service uses the default PICKUP carrier it creates automatically, regardless of whether a `ship_via` is passed in the Submit Order message.

The following steps are required to set up the default carrier:

1. Select your organization from the top of the Modern View home screen, if necessary.
2. Select **Carriers** in Modern View to advance to the Carriers screen.
3. At the Carriers screen, select Add:



The Add Carrier window opens.



4. Enter the description (up to 128 positions) and carrier code (up to 20 positions) and select any of the optional fields:
   - Express: Indicates an express shipper in Store Connect.

- Weight Required: If this flag is selected, the vendor must provide the shipping weight for each manual shipment using this carrier; otherwise, the shipping weight is optional in manual shipment. Not used in Store Connect.
- Available in Store Connect: If both this flag and the Active flag are selected, the carrier is eligible to ship orders in Store Connect.
- Rate Required: If this flag is selected, the vendor must provide the shipping rate for each manual shipment using this carrier; otherwise, the shipping rate is optional. Not used in Store Connect.
- Tracking Number Required: Indicates if the tracking number is required in Store Connect or the Vendor Portal.
- Active: Indicates whether the carrier is visible in Store Connect or the Vendor Portal.

5. Select **OK** or select **Save and Create Another**.

For more information: See the **Carriers** screen in the Online Help.

Creating the Default Unfulfillable Location

About the default unfulfillable location: The Routing Engine assigns an order to the default unfulfillable location when it cannot find a location to fulfill the order. You need to specify a default unfulfillable location at the **Preferences** screen.

1. Select **Locations** > **Locations**.
2. At the **Locations** screen:
   - Select your organization if necessary.
   - In the *Type* field, select the location type. The default unfulfillable location is ordinarily a warehouse or distribution center type.
   - In the *Location* field, enter a location code. The code cannot exceed 10 positions.
   - In the *Name* field, enter a name for the location. The name cannot exceed 40 positions.
   - In the *System* field, select the default system for your organization.
   - Select **New**.
3. At the **New Location** screen, enter any additional information about the default unfulfillable location, and select **Save** to save your entries.

For more information: See Setting up Preferences for your Organization for information on identifying the default unfulfillable location for the Routing Engine.

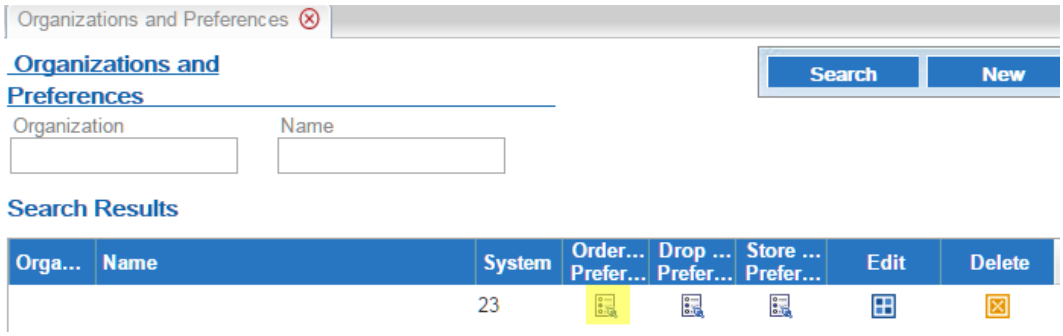
Setting up Preferences for your Organization

About preferences: Use the **Preferences** screen to set rules governing locate item searching and order assignment. You can set preferences at the organization, location type, and location level.

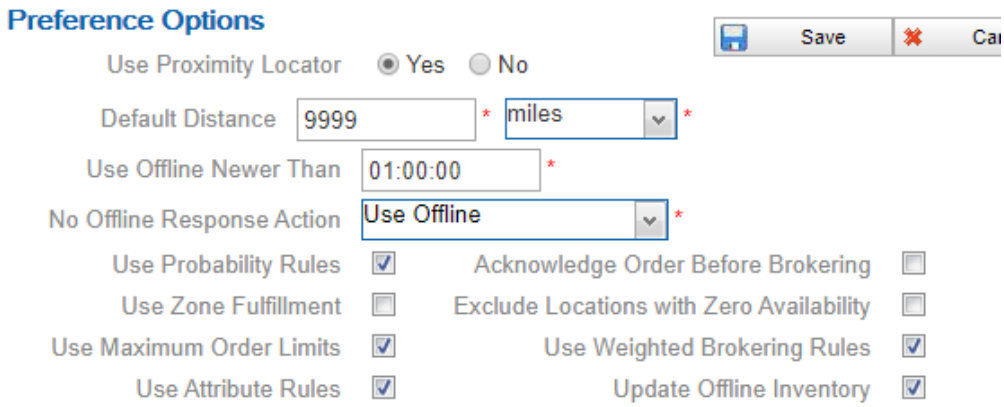
Saving again after running imports: After you import locations, products, system products, and product locations, you will need to reopen the **Preferences** screen,

make any desired updates, and select **Save** to have your preferences apply to all locations. See Scheduling Jobs for more information.

1. Select **Locations** > **Organizations and Preferences**.
2. At the **Organizations and Preferences** screen, select the *Order Orchestration Preferences* icon for your organization.



3. At the **Preferences** screen:
   - Specify basic Routing Engine options, including whether to use the Proximity Locator, the default distance to use when searching for a location, and whether to use probability rules and zone fulfillment.

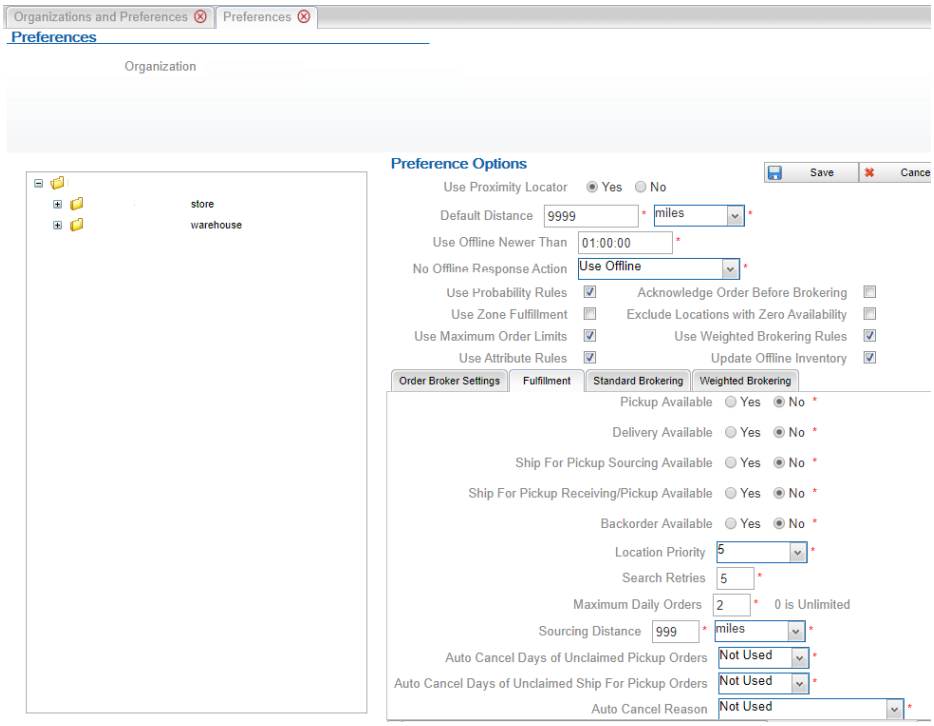


   - At the **Order Orchestration Settings** tab:
     - Specify whether to group shipment locations in responses to LocateItems requests for delivery orders, simply indicating whether the requested merchandise is available for shipment rather than listing locations in the LocateItems response.
     - Indicate whether to support splitting orders or lines, or process partial status updates for order lines.
     - Specify the maximum number of locations to return in a LocateItems response.
     - Specify the default unfulfillable location (set up through Creating the Default Unfulfillable Location). This location needs to have all of the Yes/No options under **Fulfillment** (*Backorder Available, Pickup Available, Delivery Available,* or *Ship For Pickup Sourcing* and *Ship For Pickup Receiving/Pickup*) set to **No**.
     - Specify the default carrier (set up through Setting up a Default Carrier and, Optionally, Additional Carriers).

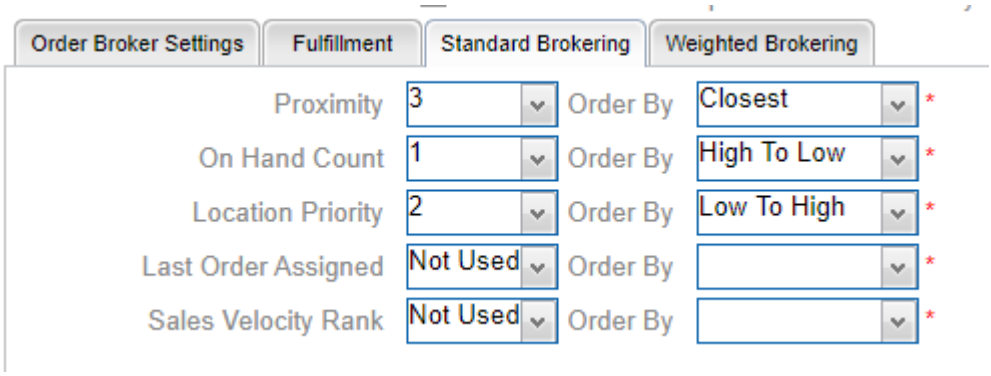
- Optionally, configure turn-by-turn distance evaluation rather than straight-line distance evaluation for delivery orders using a specified carrier. Turn-by-turn distance evaluation is available only if you use Oracle Maps Cloud Service. In order to enable turn-by-turn distance evaluation, the *Turn-by-Turn Distance URL* also needs to be specified at the Tenant- Admin screen.

For more information: See the **Preferences** screen in the online help for information on the additional options available at this tab.

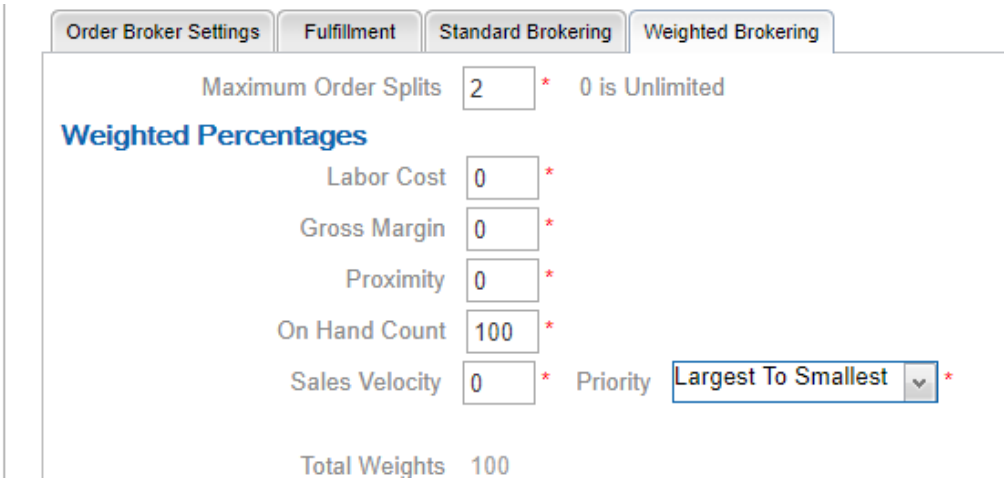
- At the **Fulfillment** tab:
  - Specify the fulfillment types supported. Note that the options here differ based on whether ship-for-pickup orders are supported.
  - Specify the priority to use for order assignment, and the maximum number of orders to assign per day.
  - At the organization level, specify the maximum number of times to reassign (“reshop”) an order if it is rejected by the assigned fulfilling or sourcing location.
  - If your organization supports ship-for-pickup orders, specify the sourcing distance for the Routing Engine to use when shopping for sourcing locations.
  - Also at the **Fulfillment** tab, complete the settings related to automatically canceling unclaimed pickup or ship-for-pickup orders.



- At the **Standard Brokering** tab, complete the fields that control brokering orders if you do not use Weighted Brokering.



- At the **Weighted Brokering** tab, complete the fields that control brokering orders if you do use Weighted Brokering.



For more information: See the **Preferences** screen in the Online Help for complete field descriptions and background.

> **Important:**
>
> You need to set all Order Orchestration preferences at the organization level before integrating any external systems with Order Orchestration Cloud Service. See the description of the **Preferences** screen in the online help for complete information on setting preferences.

Preference overrides: Optionally, you can set up overrides at the order type and system level for the Routing Engine to use when searching for fulfilling locations. For example, you can have the Routing Engine sort locations for pickup orders by proximity, while it sorts locations for delivery orders by available quantity. Unless you set up overrides, each level "inherits" the settings from the **Preferences** screen. See the **Order Orchestration Preference Overrides** screen in the Online Help for more information.

Scheduling Jobs

Use the **Schedule Jobs** screen to create schedules for jobs:

- Data Hygiene:
  - Completed Order Private Data Purge
  - Daily Clean Up
- Exports:
  - Fulfilled Inventory Export
  - Inventory Quantity Export
  - Sales Order Data Extract
- Imports:
  - Identity Cloud User Synchronization
  - Incremental Inventory Import
  - Product Import
- Orders:
  - Auto Cancel Unclaimed Pickup Orders
  - Email Notifications

See the **Schedule Jobs** screen in the online help for more information.

> **Note:**
>
> Do not attempt to schedule jobs before creating systems.

About Scheduling Imports

About imports: The automated import process enables you to import and update locations, products, system products, product locations, and product barcodes from an integrated system.

> **Note:**
>
> If you are using the Oracle Maps Cloud Service instead of the proximity upload to support proximity locator searching, you should complete Oracle Maps Cloud Service configuration before importing locations, so that the latitude and longitude of each location can be assigned as it is created. Contact your Oracle representative for information on implementing the Oracle Maps Cloud Service.

Import from default system first: In order to create product records in the default system before you create system product records in any other systems, you need to run the import for the default system before the other systems.

Processing steps: The import checks the OROB- IMPORTS container in the FILE_STORAGE table for a pipe-delimited file containing each type of information for import (location, product, system product, product location, and product bar code). See

Importing Items/Products, Inventory, Barcodes, and Locations into the Database in the online help for background on the import process.

> **Important:**
>
> Oracle recommends that you schedule imports daily at a time when demands on the system are limited, and when it does not interfere with the database backup, and that you do not schedule more than one import at a time against the same database.

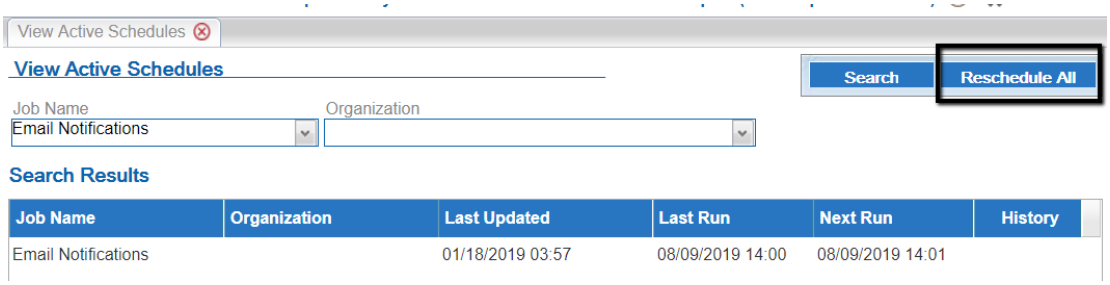
Mapping from integrating systems: Consult the integrating system's documentation and complete the **Schedule Jobs** screen for systems that support the import process, including Order Administration.

For more information: See the **Order Orchestration Routing Engine Overview** in the online help for a process overview, and see **Schedule Jobs** in the online help for file layouts, file naming conventions, and mapping details.

Restart All

Use the **Reschedule All** option at the **View Active Schedules** screen to start all scheduled jobs and programs listed above as well as:

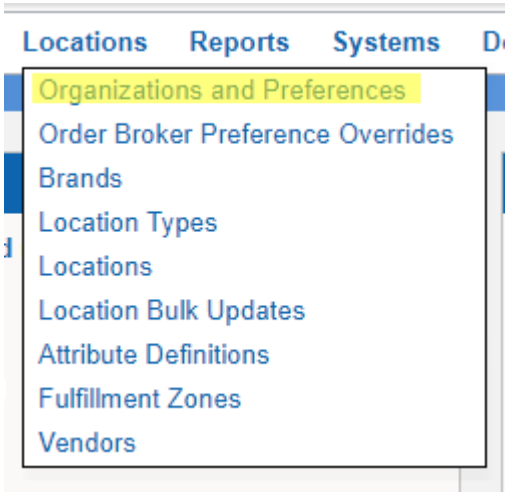
- scheduled report generation,
- polling of orders for Store Connect.



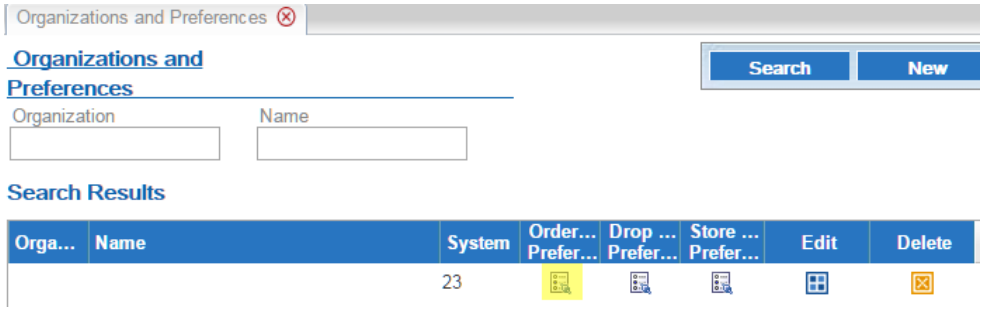
Adjust and Save Preferences

After importing locations, products, system products, and product locations, you need to return to the **Preferences** screen, make any necessary adjustments, and select **Save** again to apply the preference settings. You also need to save your preference settings after creating a new location to have the settings apply to each new location.

1. Select **Locations** > **Organizations and Preferences**.



2. At the **Organizations and Preferences** screen, select the *Order Orchestration Preferences* icon for your organization.



At the **Preferences** screen, make any necessary changes at the organization, location type, or location type level, and select **Save**.

Setting up Web Service Authentication

See the `Retail Omnichannel Web Service Authentication Configuration Guide on My Oracle Support` for web service configuration instructions.