

**Oracle® Retail Workspace**

Administration Guide

Release 13.0.2

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# Preface

The Oracle® Retail Workspace Administration Guide describes the Workspace application user interface and includes information that enables you to manage the users, roles, and application resources effectively.

## Audience

This guide is intended for the users and administrators of Workspace and assumes that you are familiar with the following:

- Security (access control, permissions, and authorization)
- Lightweight Directory Access Protocol (LDAP)
- Retail domain metrics and terminology
- Any company-specific policies, such as your naming conventions for merchandise and location hierarchies, naming conventions, and business practices

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**Note:** This guide describes the default implementation and on-screen labels. Your company may have customized the labels. In those situations, the screen labels on your user interface may not match the screen labels described in this guide.

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## Related Documents

For more information, see the following documents in the Oracle Retail Workspace Release 13.0.2 documentation set:

- *Oracle Retail Workspace Installation Guide*
- *Oracle Retail Workspace Implementation Guide*
- *Oracle Retail Workspace Release Notes*

For more information on the delegated administration on the Oracle Internet Directory, see the following documents in the Oracle Internet Directory (OID) documentation set:

- *Oracle Internet Management Guide for Delegated Administration*
- *Oracle Internet Directory Administrator's Guide*

## Customer Support

- <https://metalink.oracle.com>

When contacting Customer Support, please provide:

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

## Review Patch Documentation

If you are installing the application for the first time, you install either a base release (for example, 13.0) or a later patch release (for example, 13.0.2). If you are installing a software version other than the base release, be sure to read the documentation for each patch release (since the base release) before you begin installation. Patch documentation can contain critical information related to the base release and code changes that have been made since the base release.

## Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site (with the exception of the Data Model which is only available with the release packaged code):

[http://www.oracle.com/technology/documentation/oracle\\_retail.html](http://www.oracle.com/technology/documentation/oracle_retail.html)

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

## Conventions

The following text conventions are used in this document:

<b>Convention</b>	<b>Meaning</b>
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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# Getting Started

Welcome to Oracle Retail Workspace. This chapter introduces you to the Workspace application and provides an overview to help you get started.

This chapter includes the following information:

- [About Workspace](#)
- [Basic Concepts](#)
- [Understanding the Workspace User Interface](#)
- [Logging On to Workspace](#)
- [Setting Up Your User Profile](#)

## About Workspace

With different applications and reports set up for your business, getting access to the correct and latest information plays an important role in maximizing the gains.

The Workspace application provides a single point of access to the Oracle Retail applications used by your business. It also provides an integrated platform that can display operational and analytical information from multiple sources.

The application offers:

- Dashboards – access to information from multiple sources using portlets.
- Application Launch Pad – Single Sign-On access (set up through Oracle Application Server) to Oracle Retail applications from a single point and the ability to configure the single sign-on access to applications that are not enabled for Oracle Application Server Single Sign-On.
- Role-based Authorization – ability to grant permissions to the resources based on a user's business role.

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**Note:** Most of the user and administrative tools are links to the Oracle Internet Directory (OID) Delegated Administrative Services (DAS) application.

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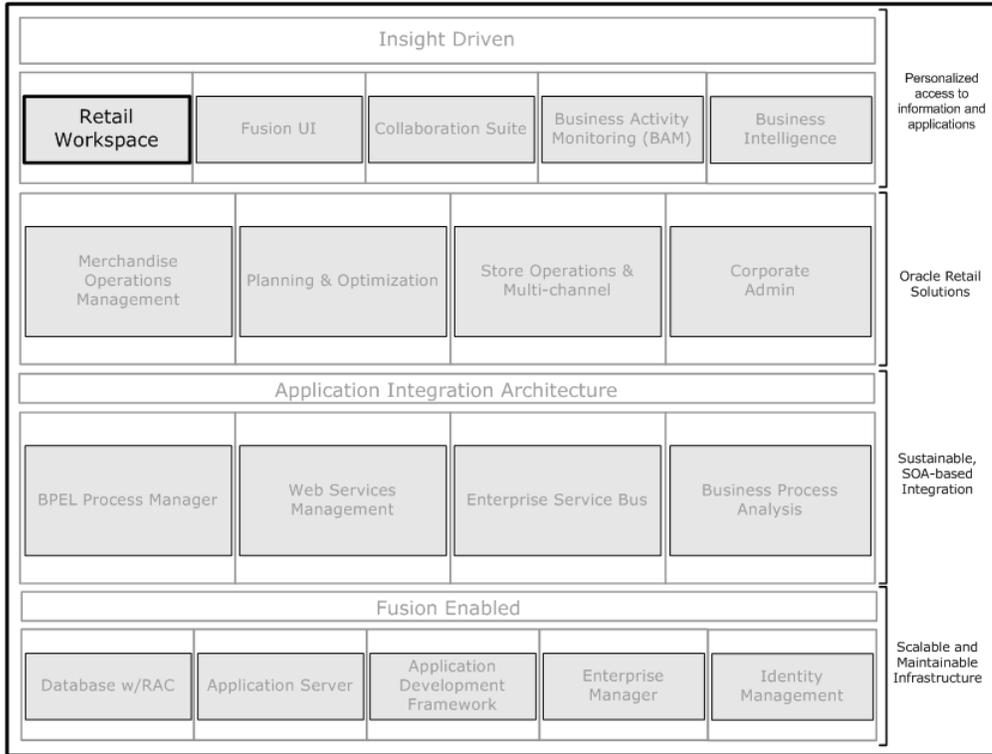
---

## Where Does Workspace Fit in a Retail Enterprise

The illustration below shows an example of a retail enterprise with the Workspace framework providing a single point of access to the applications and reports.

For more information on the Workspace architecture, refer to the *Oracle Retail Workspace Implementation Guide*.

**Figure 1–1 Workspace in a Retail Enterprise**



## Basic Concepts

This section introduces you to the following Workspace concepts:

- [Roles](#)
- [Dashboards](#)
- [Portlets](#)
- [Single Sign-On](#)

## Roles

A role specifies the scope of actions a user is allowed to perform. Workspace has a Role-based functionality that involves granting permissions to a resource (applications, dashboards, and tools) and assigning users to a role. Workspace installs with the following pre-defined roles:

- Anyone role (part of ADF framework) – The Anyone role is an ADF-specific role that is granted to any user or role who access the Workspace (regardless of the user's authentication). Resources assigned to the Anyone role are accessible to all users, including unauthenticated users.

- Oracle Retail Workspace User role – The Retail Workspace User role is at the highest level of the user-role hierarchy in Workspace. All Workspace user accounts and associated roles (including Retail Workspace Administrator role) are members of the Retail Workspace User role.
- Oracle Retail Workspace Administrator role – Users with this role can create or manage roles and user permissions.

Workspace also includes the following retail (organizational level) roles for demonstration purposes:

- Retail Workspace Executive (DEMO\_Executive)
- Retail Workspace Merchant (DEMO\_Merchant)
- Retail Workspace Planner (DEMO\_Planner)
- Retail Workspace Store Manager (DEMO\_Store\_Manager)

## Dashboards

Workspace includes the infrastructure to build dashboards. Dashboards can include reports, Web pages, HTTP links, RSS feeds, Oracle BI Delivers Alerts, BPM Worklists, and BPEL Workflows that help support the merchandise decisions made at various organizational levels in the business.

To help create dashboards that best suit your business, pre-defined dashboard examples are bundled with the Workspace application.

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**Note:** Oracle does not support any effort to customize the example dashboards. For more information on creating dashboards, refer to the *Oracle Retail Workspace Implementation Guide*.

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## Portlets

A portlet is a reusable Web component building block that can display various types of content. The portlets included with Workspace are capable of displaying reports, Web pages, HTTP links, RSS feeds, Oracle BI Delivers Alerts, BPM Worklists, and BPEL Workflows.

In Workspace, a dashboard includes multiple portlets that display information from multiple sources.

Workspace supports the consumption of JSR 168 portlets. JSR 168 is a Java Portlet specification that standardizes how components for portal servers are developed and defines a common portlet API for personalization, presentation, and security.

## Single Sign-On

Single Sign-On (SSO) is a term for the ability to log on to multiple web applications via a single user ID/password session. Oracle currently provides the following different implementations of SSO:

- Oracle Application Server Single Sign-On (OSSO)
- Java SSO (with the 10.1.3.1 release of OC4J)
- Oracle Access Manager

Along with Oracle WebCenter Suite, Oracle Internet Directory, and Oracle Application Server Enterprise Edition, OSSO forms the core technology used in Workspace.

As an OSSO compliant application, Workspace enables users to sign in only once, and access the SSO-enabled applications and reports without having to sign in again. If a user logs into the OSSO system through an application other than Workspace, the user is pre-authenticated for Workspace access (note that the user must be a member of the *Oracle Retail Workspace User* role). Once logged in, the user can access the features in Workspace or other OSSO-enabled reports or applications.

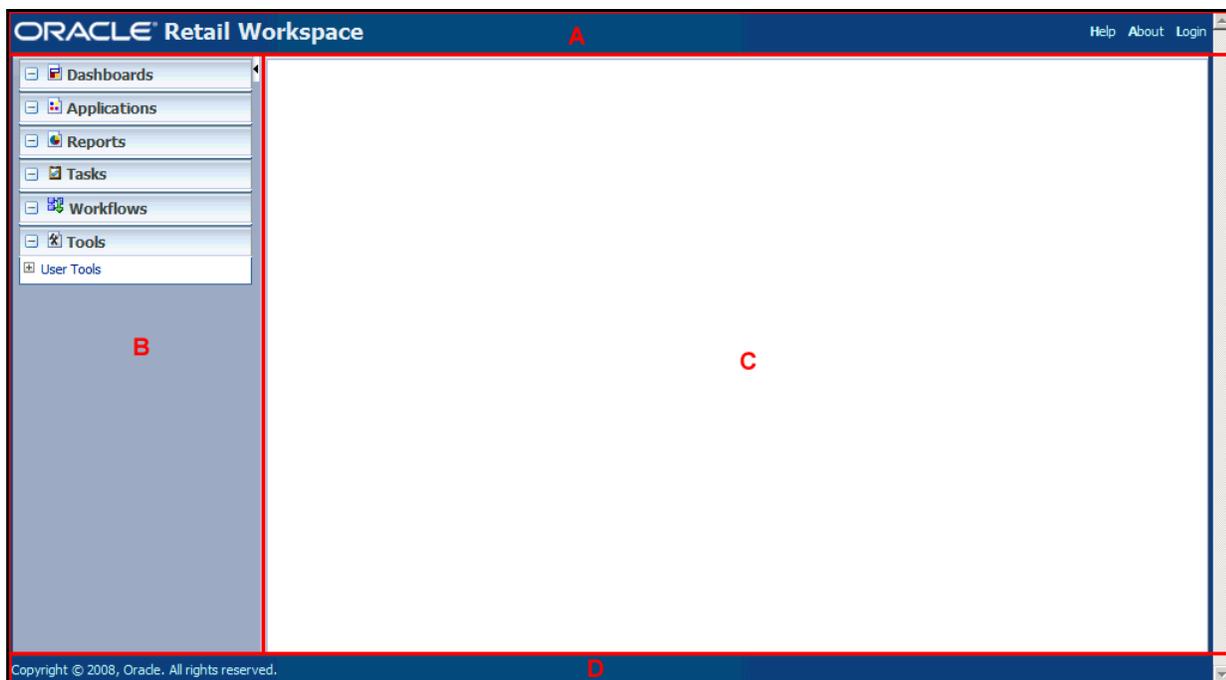
## Understanding the Workspace User Interface

The Workspace user interface consists of the following components:

- Global Header
- Navigation Pane
- Content Area
- Footer Area

The following figure highlights the various components of the Workspace user interface:

**Figure 1–2** *Workspace User Interface*



## Workspace User Interface Components

The following table describes the various screen components in the Workspace application:

**Table 1–1 Workspace User Interface Components**

Legend	Screen Area Name	Description
A	Global Header	Displayed at the top of the screen, this area appears across the business applications and custom pages. It includes the application branding, Online Help, Login, and About links.
B	Navigation Pane	Displayed on the left of the screen, this area includes all the worklists accessible to a user. It is a collapsible column. The default Workspace configuration contains the following worklists: <ul style="list-style-type: none"> <li>■ Applications</li> <li>■ Dashboards</li> <li>■ Reports</li> <li>■ Tasks</li> <li>■ Workflows</li> <li>■ Tools</li> </ul>
C	Content Area	Displayed on the center of the screen, this area displays the dashboards, reports, and other content.
D	Footer Area	Displayed on the bottom of the screen, this area displays the copyright information.

## Logging On to Workspace

Before you log on to the Workspace application, ensure that your system meets the recommended configuration. For more information, see the *Oracle Retail Workspace Installation Guide*.

Once you check the configuration, obtain the following information:

- Uniform Resource Locator, URL – you will need to enter the URL or the Web address of the application in the Web browser to access the application. For example:

```
http://yourcompanyname.domain.com
```

- User name, Password, and Company Name – based on the tasks you want to perform, obtain a user account (that includes user name, password, and an associated role) to log on to the application.

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**Note:** The application URL is specific to the Oracle Single Sign-On implementation and can be customized at each site. On the Sign In page, the *Company Name* field appears when the OSSO is configured to recognize multiple realms.

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To log on to Workspace:

1. Start Internet Explorer.
2. In the **Address** bar, enter the Workspace URL, and press Enter. The Workspace application home page appears.

3. On the top right corner of the page, click **Login**. The **Sign In** page appears.
4. On the **Sign In** page, enter the user name, password, and company name.
5. Click **Login**.

The Workspace application screen appears with access to dashboards, applications, and reports set up for your user account.

## Setting Up Your User Profile

The first time you log on to the application, Oracle recommends that you perform the following tasks to maintain a secure access to your account:

- [Setting Up Hint Question and Answer](#)
- [Resetting Your Password](#)

## Setting Up Hint Question and Answer

A hint question and answer associated with your user account makes resetting your password secure and convenient.

To set up a hint question and answer:

1. In the Navigation pane, under the **Tools** section, click **User Tools**.
2. Under the **User Tools** menu, click **Edit My Profile**. The **Oracle Identity Management Self Service Console** appears.

**Figure 1–3 Edit My Profile Page**

3. On the **Self Service Console**, review and edit the preferences and personal information associated with your user account, click **Submit**.
4. On the confirmation screen, click **Ok**. The **Self Service Console Home Page** appears.

Figure 1–4 Self Service Console Page - Home Tab



5. Click the **My Profile** tab

Or

On the **Home** tab, click the **My Profile** link.

6. On the **My Profile** tab, click **Manage My Password**. The **Manage Password** page appears.

Figure 1–5 Self Service Console - My Profile Tab



7. On the **Manage My Password** page, in the **Password Reset Hint** section, enter an appropriate hint question and answer in the **Password Reset Hint** and **Answer to Password Reset Hint** fields.

**Figure 1–6 Self Service Console - My Profile Tab - Manage My Password Screen**

Home My Profile Directory

View My Profile | Manage My Password | View My Org Chart | Change My Time Zone

Logged in as Executive User

### Single Sign-On Password

#### Reset Password

Old Password

New Password

Confirm New Password

This password also enables your access to the following applications : Default Shared Application Password Profile

#### Password Reset Hint

Password Reset Hint Question

Answer to Password Reset Hint

Clear Submit

8. Click **Submit**.

## Resetting Your Password

Once you set up the hint question and answer, you must also reset your account password. To reset the password, see [Resetting Your Account Password](#).

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## Working with Workspace

The Workspace application provides a framework and capability to launch the integrated Oracle Retail applications, external applications, tasks, workflows, reporting tools, operational and analytical reports. This chapter describes how you can effectively use the Workspace application to launch applications, access reports, tasks, and workflows.

This chapter includes the following sections:

- [Working with the Dashboards](#)
- [Launching Retail and Other Applications](#)
- [Accessing the Reports](#)
- [Accessing the Alerts, Worklists, and Workflows Tools](#)

### Working with the Dashboards

Workspace installation includes pre-defined dashboard examples and roles to help you build dashboards that best suit your business. For more information on the dashboard examples and roles, see the Metalink Note, *Oracle Retail Workspace Dashboard Examples Guide*.

### Launching Retail and Other Applications

Workspace provides the ability to launch Oracle Retail applications using the Single Sign-On mechanism. It also provides the ability to simulate the Single Sign-On launch for external applications that cannot be Single Sign-On enabled or to launch third party applications that can be accessed using a URL. The ability to access applications is based on the roles associated with your user account.

Once configured, all available applications appear under the Applications worklist (in the Navigation pane). The applications are organized under different categories based on the implementation for your business.

To launch an application:

1. In the Navigation pane, under the **Applications** worklist, select the application category.
2. Expand the relevant solution area, and then click the application you want to launch. The application launches in a new Web browser window.

**Default Applications Integrated Through the OSSO System**

The following Oracle Retail applications (Release 13.0.x) are supported through the Oracle Application Server Single Sign-On (OSSO) system:

- Active Retail Intelligence (ARI)
- Retail Invoice Matching (ReIM)
- Retail Merchandising System (RMS), including Retail Trade Management (RTM) and Retail Sales Audit (ReSA)
- Retail Price Management (RPM)
- Allocation
- Markdown Optimization
- Promotion Planning and Optimization (PPO)
- Category Management/RPAS
- Stores Inventory Management (SIM)

The following Oracle Retail application (Release 13.0.x) is supported through the external application password mapping OSSO system:

- Central Office (CO)

## Accessing the Reports

Along with the Retail applications, you can launch reports set up for your business. Unlike the role-based Applications worklist, the ability to access the reports is user-based.

Once configured, all the available reports appear under the relevant reporting tools section in the Reports worklist. When you click on a report, the report launches in the content area.

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**Note:** Oracle supports the use of Oracle's *Business Intelligence Enterprise Edition* and *Business Intelligence Publisher* as the reporting tools in Workspace.

The Workspace application provides the Oracle Application Server Single Sign-On (SSO) support for these reporting tools.

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To view a report:

1. In the Navigation pane, under the **Reports** worklist, expand the relevant reporting tool.
2. Navigate through the report categories to the report you want, and then click the report. The report launches in the Content area of Workspace.
3. On the report screen, review or set the filter options, and click **View**.

Since the reports can include huge amount of information, the Report screen includes some extra menu options that help you filter the information before viewing the report.

## Printing the Reports

Once you view the report, you may consider printing the report.

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**Note:** Printing capabilities and options are derived from the reporting tool where the report was created.

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To print a report:

1. On the report screen, review the report.
2. Click **Print**. The **Print** dialog box appears.
3. On the **Print** dialog box, set the print options, and click **Print**.

## Exporting the Reports

Along with printing the report, you can also export the report information.

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**Note:** Exporting capabilities and options are derived from the reporting tool where the report was created.

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To export a report:

1. On the report screen, review the report.
2. Click **Export**. The **Export** dialog box appears.
3. On the **Export** dialog box, set the location and the file type, and then click **Export**.

For more information on using the reports, refer to the applicable reporting tool documentation set (For example, *Oracle Business Intelligence Publisher User's Guide*).

## Accessing the Alerts, Worklists, and Workflows Tools

Workspace provides an integration with Oracle BPM Worklists, BI Delivers Alerts, and BPEL Workflows. You can launch these tools as well as display them in a dashboard portlet. Since they are OSSO-enabled, once you log on to the OSSO system, you will not be required to sign in again to launch the application or view the BPM Worklists, BI Delivers Alerts, or BPEL Workflows. For more information on configuring these tools in the dashboard portlets, refer to the *Oracle Retail Workspace Implementation Guide*.

### About BPM Worklists

BPM Worklists are user-based like reports and only BPM worklists assigned to a specific user appear on the screen.

### About BI Delivers Alerts

Oracle BI Delivers Alerts are user-based like reports and only alerts for a specific user appear on the screen.

### About BPEL Workflows

BPEL Workflows are role-based and Workspace roles can be made to access them. In addition to integration with BPEL Workflows, Workspace provides access to the Oracle BPEL Administration tool to administer BPEL Workflows.



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## Managing Workspace

This chapter includes information on the various administrative tasks you can perform as an administrator. It also includes information on the user management features that a user can access when logged on to the application.

This chapter includes the following sections:

- [Managing Your Profile](#), using the User Tools worklist.
- [Managing Users and Roles](#), using the Admin Tools worklist.
- [Managing Access to Workspace Components](#), using the Permissions Management feature.

### Managing Your Profile

The *User Tools* worklist provides the following features that help you manage your user profile:

- [Viewing Your Profile](#)
- [Editing Your Profile](#)
- [Resetting Your Account Password](#)
- [Searching for Users](#)
- [Logging On to Metalink](#)

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**Note:** Features in the User Tools worklist are provided through the Oracle Internet Directory (OID) Delegated Administrative Services. For more information on these features, refer to the *Oracle Identity Management Guide to Delegated Administration*.

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## Viewing Your Profile

To view your profile:

- On the Navigation pane, under **Tools** worklist, expand **User Tools**.
- Click **Account Info** to view the information associated with your user profile. The **View My Profile** page appears and displays the basic, contact, organizational, and provisioning information.

To change this account information, click **Edit My Profile**.

## Editing Your Profile

To edit your user profile:

- On the Navigation pane, under **Tools** worklist, expand **User Tools**.
- Click **Edit My Profile** to view and edit the basic, contact, organizational, and provisioning information associated to your user account.

## Resetting Your Account Password

Use the *Reset Password* feature to change or reset the password associated with your user account.

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**Note:** For the Reset Password feature to work properly, ensure that you have set up the Hint Question and Answer for your profile. For more information, see [Setting Up Your User Profile](#).

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To reset the password:

1. On the Navigation pane, under **Tools** worklist, expand **User Tools**.
2. In the **User Tools** section, click **Reset Password**. The **Reset My Single Sign-On Password** page appears.

**Figure 3–1 Self Service Console - Reset My Single Sign-On Password Page**

The screenshot shows the Oracle Identity Management Self-Service Console interface. At the top, it says "ORACLE Identity Management Self-Service Console" with a "Help" link. The main heading is "Reset My Single Sign-On Password". Below this is a progress indicator with three steps: "Confirm Identity" (the first step, which is active and highlighted with a blue circle), "Confirm Additional Personal Information", and "Reset SSO Password". Under the "Confirm Identity" step, there is a text prompt: "Your identity needs to be confirmed by entering your Single Sign-On user name and name of the company you are associated with. Click on Next to continue." Below this prompt are two input fields: "User Name" and "Company". At the bottom right of the form area, there are three buttons: "Cancel", "Step 1 of 3", and "Next". At the bottom left, there is a copyright notice: "Copyright ©1996, 2006, Oracle. All rights reserved." and a "Help" link.

3. In the **Confirm Identity** section, enter the **User Name** and **Company**, and then click **Next**. The **Confirm Additional User Information** page appears.

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**Note:** The **Company** field displays only if the OID Delegated Administrative Services (DAS) is enabled for multiple realms.

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4. The **Confirm Additional User Information** page displays the hint question that you had set up the first time you logged on to the application. For more information on setting up the hint question, see [Setting Up Hint Question and Answer](#).
5. Type the answer associated with the hint question, and click **Next**.
6. Enter a password you want, and then click **Submit**.

## Searching for Users

Use the *User Search* feature to search for users already set up with the application.

To search for a user:

1. On the Navigation pane, under **Tools** worklist, expand **User Tools**.
2. In the **User Tools** section, click User Search. The **Search** page appears.
3. In the **Search for User** field, enter a text string you want, and then click **Go**. Search results relevant to your text input appear on the page.
4. Under the **User ID** column, click a user to view the associated profile.

The View My Profile page appears that displays the profile. To go back to the search results, click **Go Back**.

## Logging On to Metalink

Click the **Metalink** link to log on to the Oracle Metalink Web page for accessing knowledge base articles and resolving issues with the application. Metalink is not a part of the Single Sign-On integration, and you must log on to the Web site using your Metalink user account.

## Managing Users and Roles

The *Admin Tools* worklist includes the following features that help you manage user accounts, roles, access permissions, and application configuration:

- [Creating a User](#)
- [Editing a User](#)
- [Deleting a User](#)
- [Creating a Role \(Group\)](#)
- [Editing a Role \(Group\)](#)
- [Deleting a Role \(Group\)](#)

Ensure that you have appropriate administrative privileges to access and use the features in the Admin Tools worklist.

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**Note:** Most of the features in the Admin Tools worklist are provided through the Oracle Internet Directory (OID) Delegated Administrative Services. For more information on these features, refer to the *Oracle Identity Management Guide to Delegated Administration*.

---

---

### Creating a User

Use the *Create User* feature to create and configure a Workspace user account.

You can create user accounts in one of the following ways:

- If you need to add one or two user accounts, see [Creating a Single User Account](#).
- If you need to create multiple user accounts all at once, use the Bulk Load feature. For more information, see [Creating Multiple User Accounts](#).

#### Creating a Single User Account

To create a new user account:

1. On the Navigation pane, under the **Tools** worklist, expand **Admin Tools**.
2. In the **Admin Tools** section, click **Create User**. The **Oracle Identity Management Provisioning Console** appears. This console helps you set up a new user account.

Figure 3–2 Oracle Identity Management Provisioning Console

3. On the **Provisioning Console**, enter appropriate information on the various fields. Ensure that you enter information for fields preceded with an asterisk (\*).
4. Click **Submit**.

### Creating Multiple User Accounts

The Bulk load feature enables you to create multiple user accounts.

---

**Note:** The Bulk load feature requires that you upload an LDAP Data Interchange Format (LDIF) file set up with the new user accounts. Before you access the Bulk load feature, ensure that the LDIF file is set up with the user accounts.

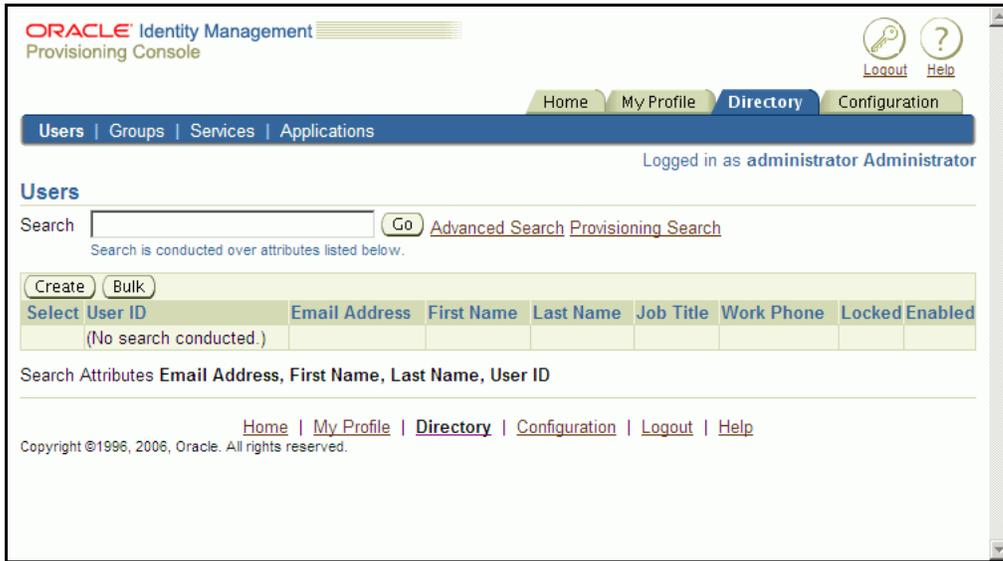
To help you set up an LDIF file, a sample LDIF file is available in the Workspace installation folder.

---

To create multiple user accounts all at once:

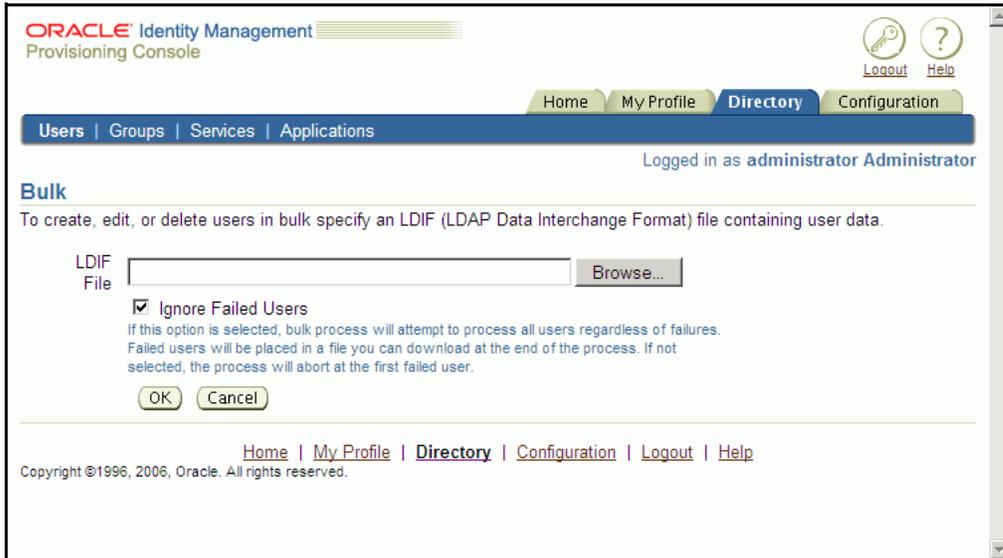
1. Navigate to the **Oracle Identity Management Provisioning Console** home page. You can use the following steps:
  - a. On the Navigation pane, under the **Tools** worklist, expand **Admin Tools**.
  - b. In the **Admin Tools** section, click **Create User**. The **Oracle Identity Management Provisioning Console** appears.
  - c. Click **Cancel**. The **Provisioning Console** home page appears.
2. On the **Provisioning Console** home page, click the **Directory** tab.

Figure 3–3 Oracle Identity Management Provisioning Console - Creating Bulk Users



3. On the **Directory** tab, click **Bulk**.

Figure 3–4 Loading LDIF File



4. Click **Browse** and select the LDIF file set up with the new user accounts.
5. Click **OK**.

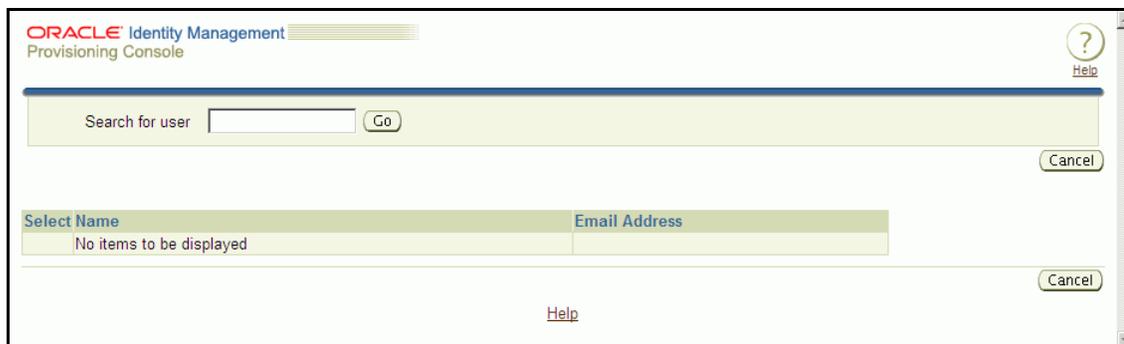
## Editing a User

Use the *Edit User* feature to edit an existing user account.

To edit a user account:

1. On the Navigation pane, under the **Tools** worklist, expand **Admin Tools**.
2. In the **Admin Tools** section, click **Edit User**. The **Oracle Identity Management Provisioning Console** appears. This console helps you edit a user account.

**Figure 3–5 Oracle Identity Management Provisioning Console - Edit User**



3. On the **Provisioning Console**, enter the user name in the **Search for user** field, and click **Go**. User accounts that match the search string appear.
4. Select the user you want, and click **Edit**.
5. Edit the user account information, and click **Submit**. A confirmation message appears.
6. Click **Done**.
7. Restart the application server that hosts Workspace.

---

**Note:** Changes to the user account take effect once you restart the application server or the OID cache expires.

---

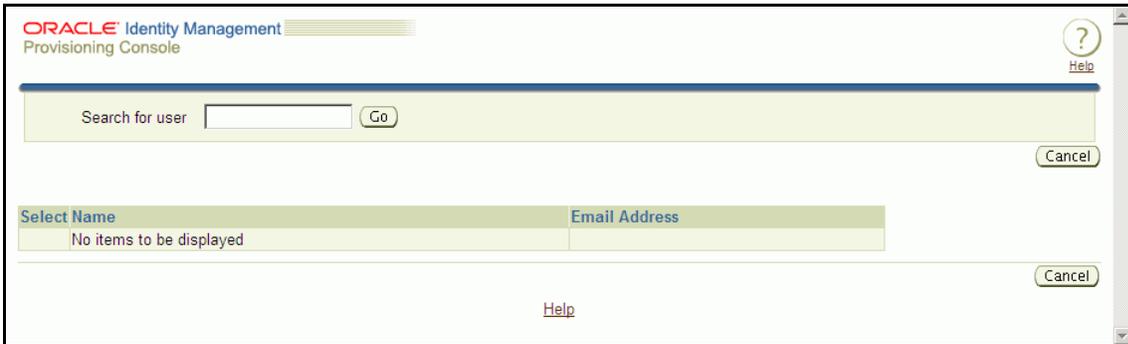
## Deleting a User

Use the *Delete User* feature to delete an existing user account.

To delete a user account:

1. On the Navigation pane, under the **Tools** worklist, expand **Admin Tools**.
2. In the **Admin Tools** section, click **Delete User**. The **Oracle Identity Management Provisioning Console** appears.

**Figure 3–6 Oracle Identity Management Provisioning Console - Delete User**



3. On the **Provisioning Console**, enter the user name in the **Search for user** field, and click **Go**. User accounts that match the search string appear.
4. Select the user you want, and click **Delete**. A confirmation message appears.
5. Click **Yes**.

## Creating a Role (Group)

Use the *Create Role (Group)* feature to create role-based groups.

---

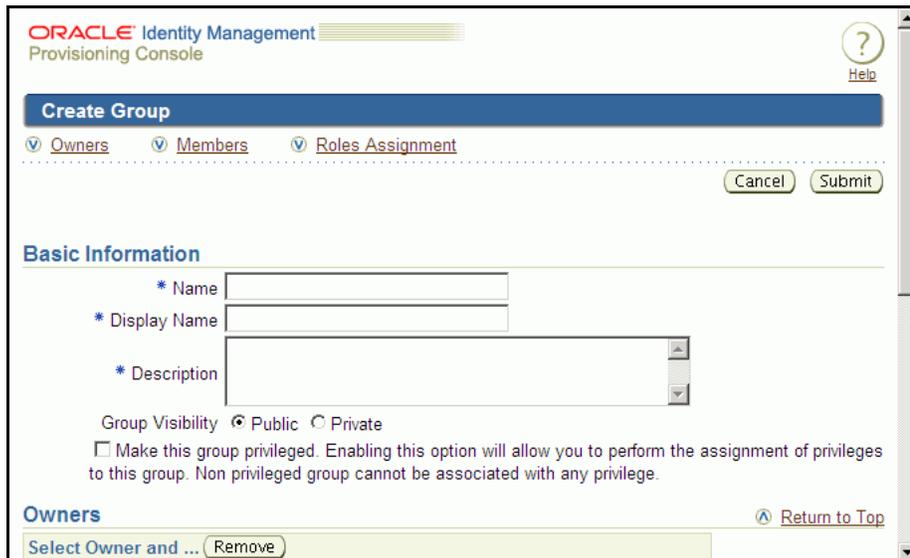
**Important:** When you create a role, ensure that you add the role as a member of the *Retail\_Workspace\_Users* group.

---

To create a role-based group:

1. On the Navigation pane, under the **Tools** worklist, expand **Admin Tools**.
2. In the **Admin Tools** section, click **Create Role (Group)**. The **Oracle Identity Management Provisioning Console** appears.

**Figure 3–7 Oracle Identity Management Provisioning Console - Create Group**



3. On the **Provisioning Console**, under the **Basic Information** section, enter the following information:
  - **Name** – Type a group name that represents the relative distinguished name (RDN). RDN is the unique component of a Distinguished Name (DN) in an Internet Directory.
  - **Display Name** – Type a display (more convenient) name for the group.
  - **Description** – Type a description of the group. This field is optional.
  - **Group Visibility** – To hide the group from groups or users other than the owners, select the Private option. If a group is private, it is unusable, therefore when creating or editing a group for Workspace always ensure that the group visibility is public.
  - **Make this group privileged** – Select this check box if you want to assign privileges to this group.
4. In the **Owners** section, click **Add Group**. The **Search and Select: Group** window appears.
5. In the **Search and Select: Group** window, type **Retail** in the **Group Name Begins With** field, and then click **Go**.
6. Once the results appear, select **Retail\_Workspace\_Users**, and then click **Select**. The **Retail\_Workspace\_Users** group appears under the **Owners** list.
7. In the **Members** section, follow steps similar to steps 4–6 to add members (users or groups) to the group.
8. In the **Roles Assignment** section, under the **Select** column, select the check box next to the roles you want to assign to the group
9. Click **Submit**.

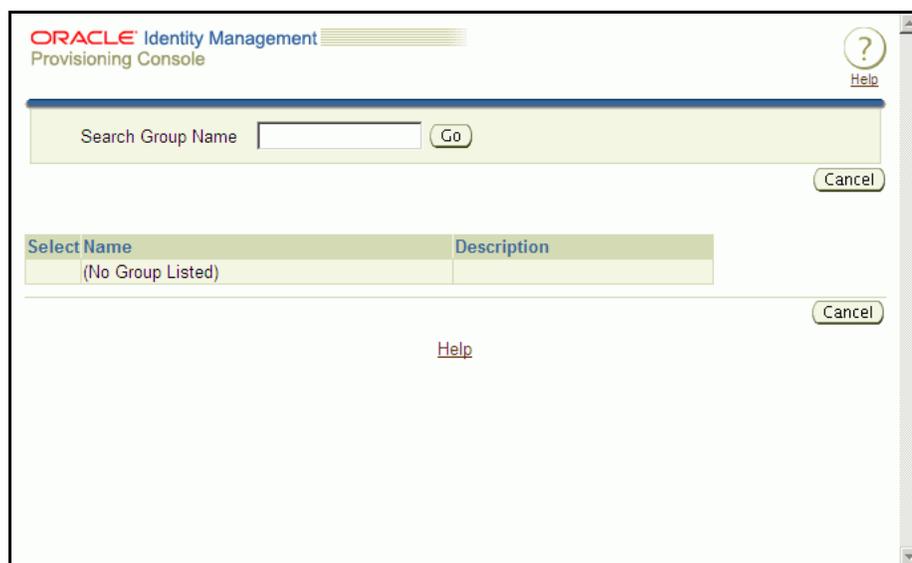
## Editing a Role (Group)

Use the *Edit Role (Group)* feature to edit an existing role.

To edit a role:

1. On the Navigation pane, under the **Tools** worklist, expand **Admin Tools**.
2. In the **Admin Tools** section, click **Edit Role (Group)**. The **Oracle Identity Management Provisioning Console** appears.

**Figure 3–8 Oracle Identity Management Provisioning Console - Edit Role**



3. On the **Provisioning Console**, enter the role name in the **Search for user** field, and click **Go**. User accounts that match the search string appear.
4. Select the role you want, and click **Edit**.
5. Edit the role information, and click **Submit**. A confirmation message appears.
6. Click **Done**.
7. Restart the application server that hosts Workspace.

---

**Note:** Changes to the role take effect once you restart the application server or the OID cache expires.

---

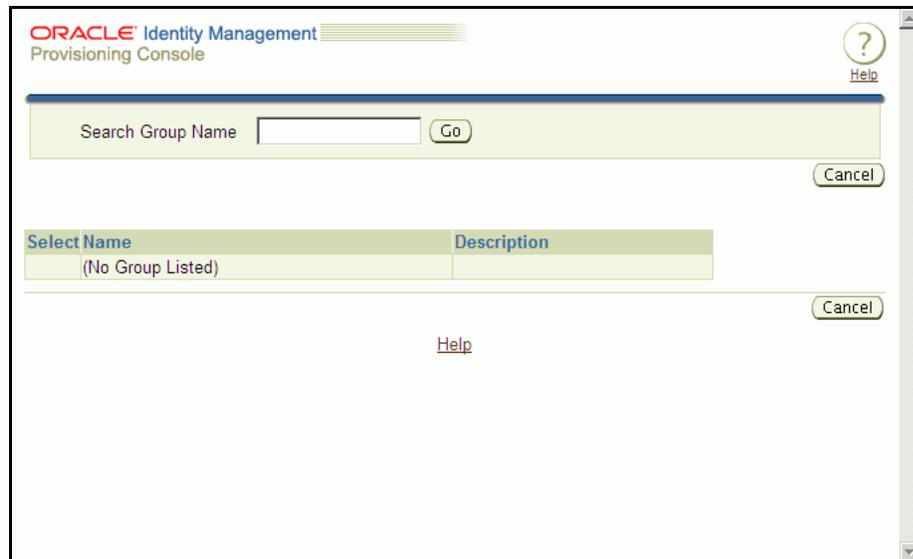
## Deleting a Role (Group)

Use the *Delete Role (Group)* feature to delete an existing role-based group.

To delete a role:

1. On the Navigation pane, under the **Tools** worklist, expand **Admin Tools**.
2. In the **Admin Tools** section, click **Delete Role (Group)**. The **Oracle Identity Management Provisioning Console** appears.

**Figure 3–9 Oracle Identity Management Provisioning Console - Delete Role**



3. On the **Provisioning Console**, enter the role name in the **Search for user** field, and click **Go**. Roles that match the search string appear.
4. Select the role you want, and click **Delete**. A confirmation message appears.
5. Click **Yes**.

## Managing Access to Workspace Components

The *Permissions Management* feature enables you to grant or revoke permissions to all the secure elements and nodes that form part of the Workspace framework. This includes access to the dashboards, applications, reports, and tools sections of the application.

Each secured work element will only be displayed to a user when you grant the user appropriate access permissions for that work element. You can assign the access permissions to a specific user or to a group of users (role).

---

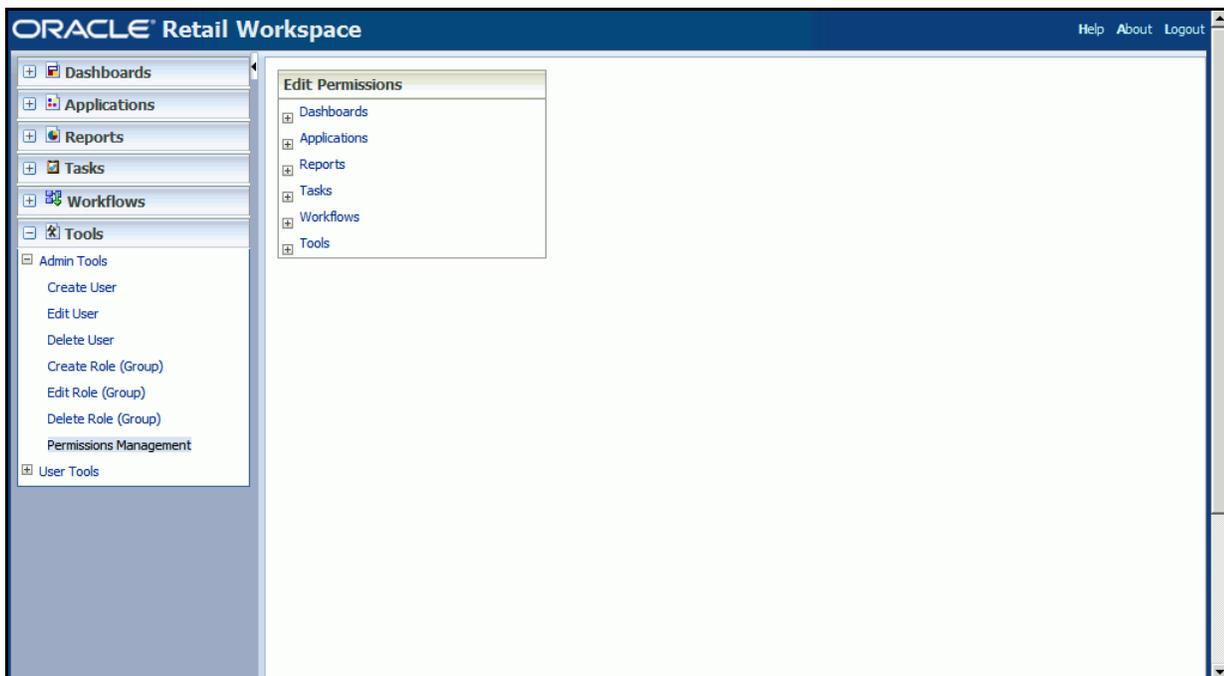
**Note:** To launch an application, additional permissions and other relevant information may also need to be set up at the application side.

---

To grant access permissions to a secure work element:

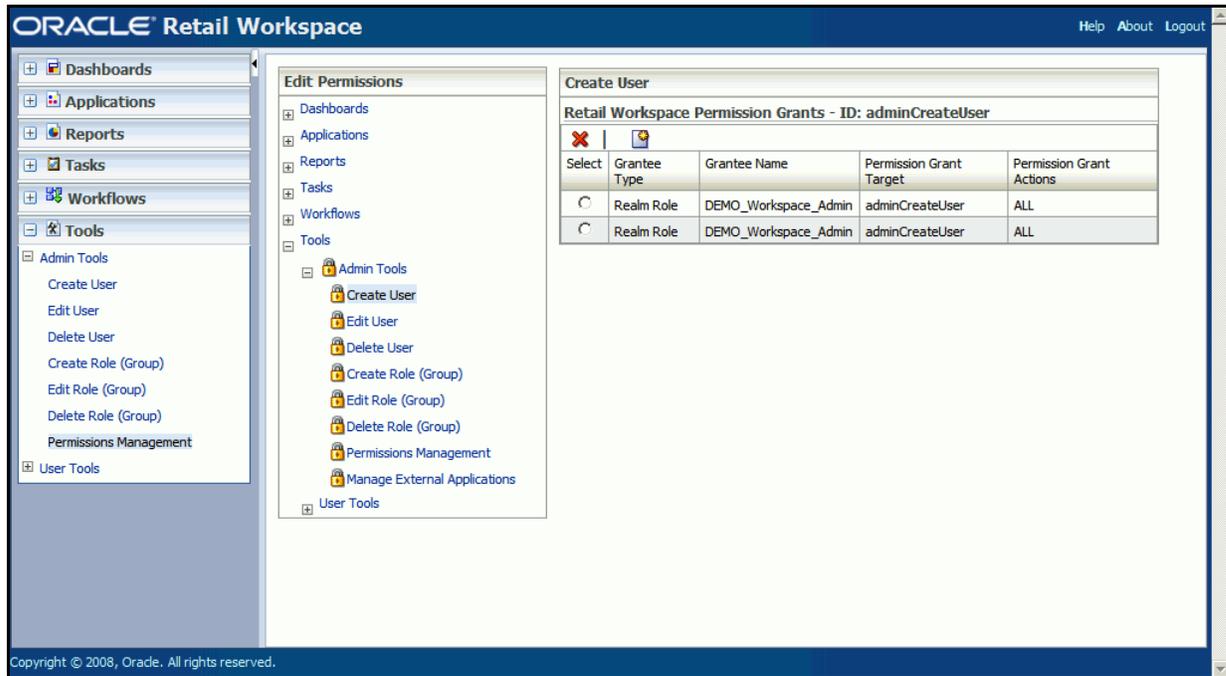
1. On the Navigation pane, under the **Tools** worklist, expand **Admin Tools**.
2. In the **Admin Tools** section, click **Permissions Management**. The **Edit Permissions** page appears in the Content area and displays the work elements in a hierarchy tree structure as they appear in the Navigation area.

**Figure 3–10** Edit Permissions Screen in the Content Area



3. Drill down the hierarchy tree and click the work element you want. The **Permissions Grant** area for the work element appears.

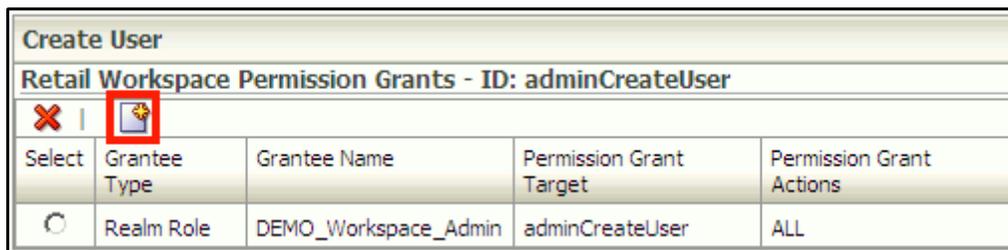
Figure 3–11 Permission Grants Area



**Note:** In the hierarchy tree, the **Lock** icon next to a work element indicates secure access to the work element. Users with specific permissions can access the work element.

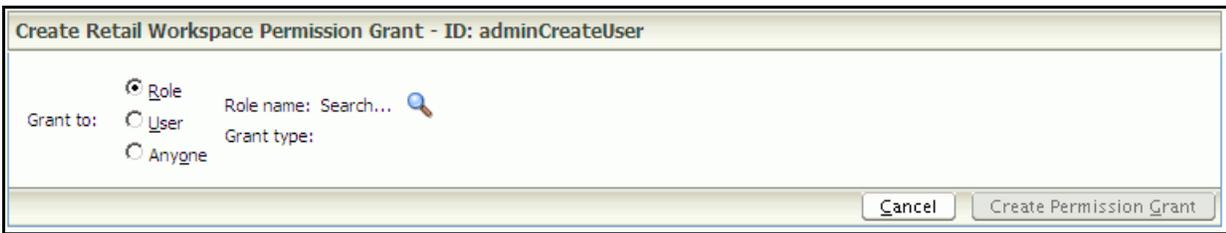
4. Click the **Add New Retail Workspace Grant** icon to grant permissions to this work element for a specific user or role. The **Create Retail Workspace Permission Grant** screen appears.

Figure 3–12 Add New Retail Workspace Grant Icon



5. On the **Create Retail Workspace Permission Grant** screen, use the following steps and select the user or role you want.

**Figure 3–13 Create Retail Workspace Permission Grant Screen**



6. In the **Grant to** section, select the **Role**, **User**, or **Anyone** check box.  
 The **Anyone** check box enables you to grant anonymous access to the work element you want. Once you grant this permission, users can access the work element without logging on to the application.

---

**Note:** Although Oracle recommends that you grant permissions to a specific role, you can also choose to grant permissions to specific users when the user's capabilities are not adequately defined by the current set of roles.

If you want make an application resource available to any user, grant the access to the **Anyone** role.

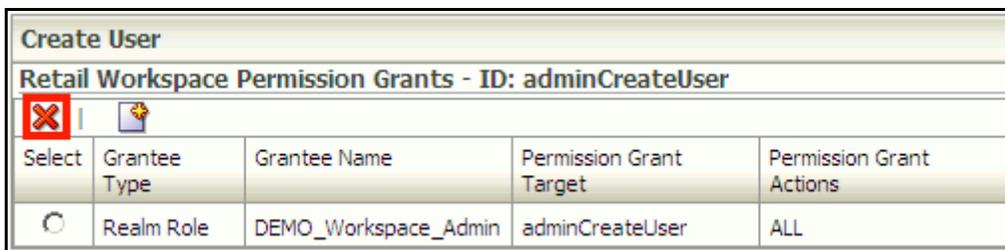
---

7. Based on the check box you select in the **Grant to:** section, click the **Search** icon to search the user or role you want. The **Search and Select** screen appears.
8. On the **Search and Select** screen, enter a search string, and click **Go**.
9. Select the user or role you want, and then click **Select**.
10. On the **Create Retail Workspace Permission Grant** screen, click **Create Permission Grant**.

To delete a permission grant for a work element:

- In the **Permissions Grant** area, select the permission grant you want to delete, and then click the **Delete Selected Retail Workspace Grant** icon.

**Figure 3–14 Delete Selected Retail Workspace Grant Icon**



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## Managing External Applications

Any application that does not participate in the Oracle Application Server Single Sign-On (OSSO) authentication process is considered as an external application. These applications typically implement their own authentication process, where the users may need to specify a user name and password each time they access the application.

Oracle Application Server Single Sign-On (OSSO) includes a facility that enables you to configure a transparent authentication to the external applications. Once configured, the user credentials are encrypted and stored when the users access the external application for the first time.

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**Note:** This facility is an integral part of the Oracle Portal Development Kit (PDK). Since many of the OSSO external application APIs are exposed as URLs, the facility may be used outside the PDK.

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This section introduces you to the administrative aspects of the OSSO external applications and Workspace. It includes the following sections:

- [Overview of the OSSO External Applications Facility](#)
- [Defining an External Application in OSSO](#)
- [Obtaining the OSSO External Application ID](#)
- [Managing User Credentials](#)
- [Configuring Workspace to Launch External Applications via OSSO](#)
- [Sample External Application JavaScript and HTML](#)

For additional information, refer to the *Oracle Retail Workspace Implementation Guide* or the *Oracle Application Server Single Sign-On Administration Guide*.

## Overview of the OSSO External Applications Facility

The OSSO *External Application* facility works in the following manner:

1. As an administrator, you first create an external application definition in the OSSO system. This definition includes the URL to which the user credentials are submitted and any other parameters needed to launch the external application.
2. Once configured, if a user wishes to launch the external application and has the OSSO login credentials, the user enters the OSSO "process login" URL, along with the unique OSSO identifier as a parameter.
3. If the OSSO system has not yet stored the user's credentials (user ID and password), the user is prompted for them by the OSSO system.
4. The OSSO system reads the external application definition and the user credentials associated with the application, and creates a URL containing the credentials (based on the authentication scheme). Depending on the external application definition, the Web browser is then redirected or a form is submitted to the application URL.
5. The OSSO external application processes the request made in the step above, and the user gets logged on to the application.

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**Note:** Although the OSSO *External Application* facility deals with a single operation, it does not maintain any state of the user's browser session. It also does not determine whether a specific user is already logged in to the external application.

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---

Some applications require additional processing. For example, an application may require a browser to request a specific URL before accessing the URL used to authenticate the user. Also, this second URL may only be legally accessed when the user has not previously logged into the external application. A category of these applications use the "j\_security\_check" authentication mechanism. Sample JavaScripts are provided that may be used to provide a Single Sign-On experience with this category of applications.

### Pre-requisites

When OSSO is configured to use Oracle Database 10g Release 2 (10.2.0) or later, the `init{SID}.ora` configuration file must contain a specific "event" entry for the *External Applications* facility to work. For more information on this configuration, refer to the **Metalink Note #344602.1 WWC-00006 and WWC-41400 When Trying To Login To An External Application.**

## Supported Types of Authentication

The OSSO *External Application* facility supports the following authentication mechanisms:

- BASIC Authentication – The user credentials are supplied to the application as part of the URL. For example,

`http://username:password@host.company.com/appname`

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**Note:** URLs containing the "username:password" construct are not supported in recent versions of Microsoft's Internet Explorer, unless specific Microsoft Windows registry entries are modified. For more information, see the *Help and Support article #834489* on the Microsoft Web site. You may also choose to access the external application via a JavaScript, such as the one used by the *basicAppRemote.html* file described in the *Oracle Retail Workspace Implementation Guide*.

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- GET Authentication – The user credentials are passed as parameters in the URL's query string and an HTTP GET operation is performed. The names of these parameters are application specific. The query string may be seen in the Web browser's address bar when the operation has completed.
- POST Authentication – The user credentials are passed as parameters within an HTTP POST (form submit) operation. The credentials information is not displayed to the user.

## Security Considerations Launching External Applications

The main security consideration for launching an external application is protecting the user name and password from disclosure. The OSSO system stores this information in an encrypted form in the OSSO database. However, unless the URL accessed uses the secure HTTPS protocol, this information is not encrypted when the browser submits the user's credentials to the external application. Unless HTTPS is used with both the OSSO URL and the external application's URL, the user's credentials will be transmitted in clear text or in an easily decoded format. Also, if the "GET" authentication is used, this information may also be displayed in the browser's address bar.

## Defining an External Application in OSSO

The *External Applications* facility in the OSSO system enables you to configure external applications for single sign-on support. This section describes how you can define an external application in the OSSO system.

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**Important:** Before you begin, ensure that you have administrative privileges and your user account is a member of the *iASAdmins* group in order to manage OSSO external application definitions. Members of this group have significant additional privileges as well.

The user ID 'orcladmin' is typically made a member of the *iASAdmins* group when OID is installed. Following is the distinguished name (DN) of the *iASAdmins* group:

```
cn=iASAdmins,cn=Groups,cn=OracleContext
```

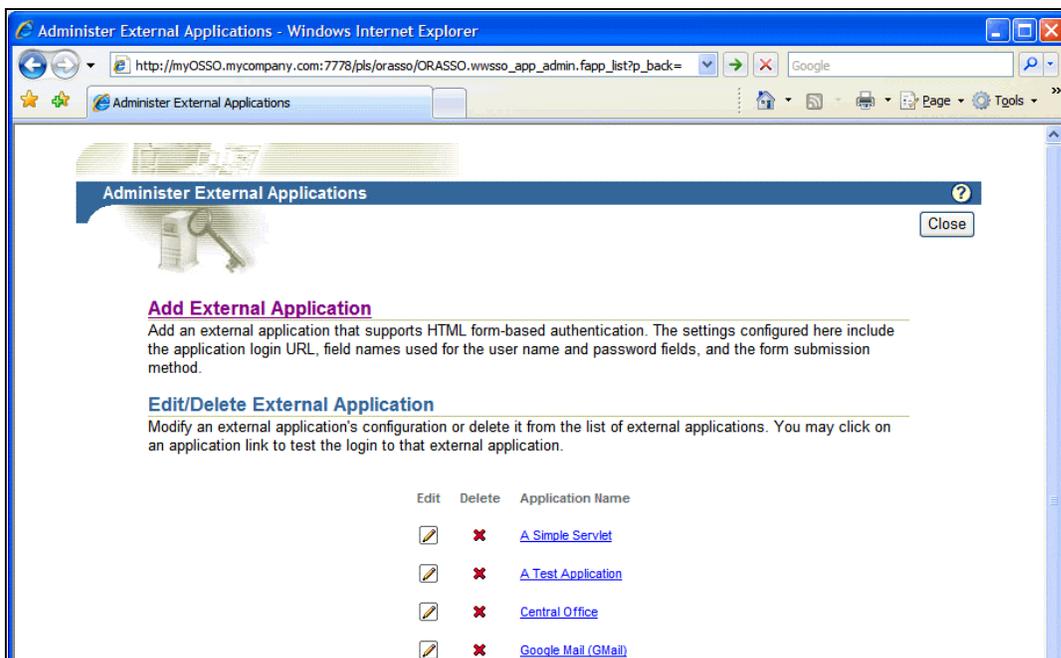
Members can be added to this group using the *ldapadd* command, the *oidadmin* tool, and other LDAP tools.

---

To define an external application:

1. Click the OSSO External Application Management URL. For more information, see [Launching OSSO External Application Management](#). The **Administer External Applications** page appears.

**Figure 4–1 Administer External Applications Page**



2. To add a new external application, click the **Add External Application** link. The **Create External Application** page appears.

Figure 4–2 Create External Application Page

**Create External Application**

Apply OK Cancel

**External Application Login**

Enter the application name, the login URL, and the user name and password HTML field names used by the application's login form. The login URL is typically the submit action of the application's login form. It will be used in conjunction with the user name and password field names to perform a single sign-on login into this application. The login URL as well as the user name and password field names should be determined by inspecting the source of the application's standard login form. User name/id, password, additional field etc. values are not required for Basic authentication and Login URL should be a url which requires authentication.

Application Name:

Login URL:

User Name/ID Field Name:

Password Field Name:

**Authentication Method**

Select the authentication method used by this application. The POST method submits the credentials with the body of the form. The GET method submits the login credentials as part of the login URL.

Type of Authentication Used:

**Additional Fields**

Type the names and values of any additional fields that are submitted with the login form of the external application.

Field Name	Field Value	Display to User
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

- On the **Create External Application** page, enter relevant information in the following fields:
  - Application Name** – Name appearing on the **Administer External Application** page.
  - Login URL** – The URL (host name, port, URI) to which the user credentials are submitted.
  - User Name/ID Field Name** – The name of the parameter that identifies the user name or user ID. The value of the parameter with this name is the user ID used to log on to the external application. This field is valid only for the "GET" and "POST" authentication types.
  - Password Field Name** – The name of the **parameter** that identifies the password (associated with the user account) used to log on to the external application. This field is valid only for the "GET" and "POST" authentication types.
  - Type of Authentication Used** – The authentication mechanism to be used for the external application. For more information on the options, see [Supported Types of Authentication](#).
  - Additional Fields** – This section enables you to specify additional parameters associated with the login URL of the external application. These parameters, along with the UserName/ID and the Password fields, may need to be included in the Login URL's query string ("BASIC" or "GET" authentication) or submitted as form input parameters ("POST" authentication). Select the **Display to User** check box to make the field value editable for the

users when they specify the user credentials to log on to the external application.

---

**Note:** Information stored in **Additional Fields** section is not encrypted within the OSSO database.

---

You can find additional information on these fields in the chapter "Configuring and Administering External Applications" of the *Oracle Application Server Single Sign-On Administrator's Guide*.

4. Click **OK**. The new external application appears under the **Edit/Delete External Application** section on the **Administer External Applications** page, along with the other external applications.

#### Determining the Authentication Type and Additional Fields Values

Determining the values used for the "Type of Authentication Used" and the "Additional Fields" table requires an in-depth knowledge of the external application implementation. You can find additional information on the techniques in the *Oracle Single Sign-On Administration Guide* and the *Oracle Retail Workspace Implementation Guide*.

## Launching OSSO External Application Management

The Workspace application can be configured to provide a link to the OSSO URL used to manage the external applications. The OSSO URL has the following form:

```
http[s]://[OSSO Host]:[OSSO Port]/pls/orasso/ORASSO.wvso_app_admin.fapp_list
```

where,

- *http[s]* is "http" or "https".
- *[OSSO Host]* is the host name of the OSSO server.
- *[OSSO Port]* is the associated port number of the OSSO server.

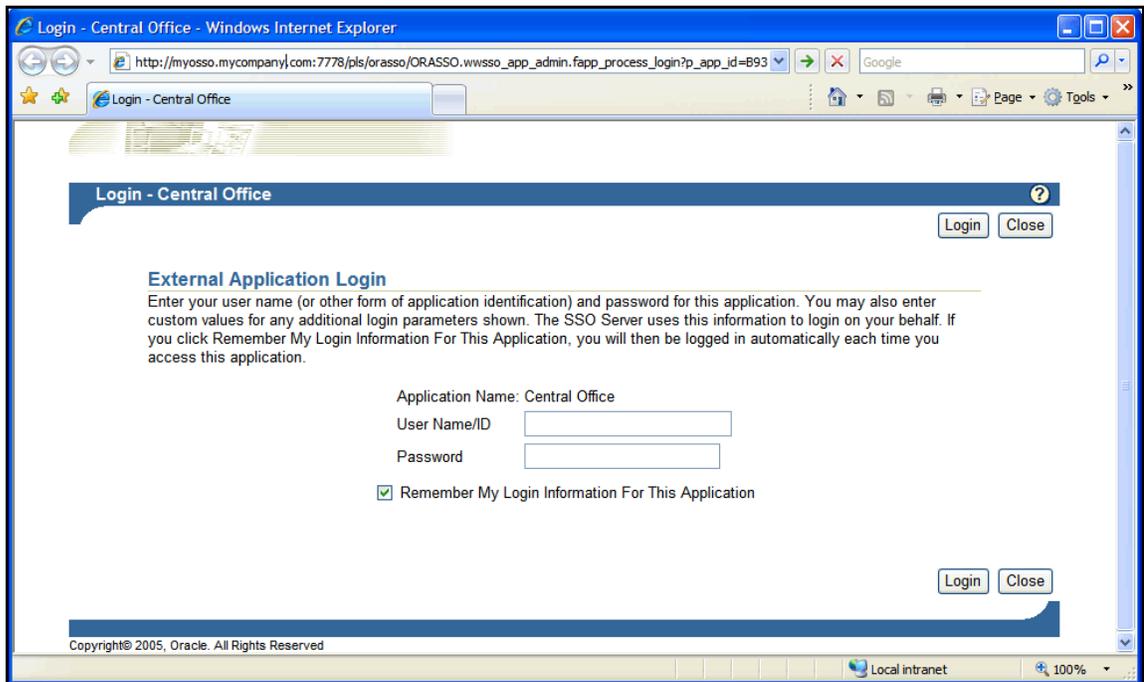
A link to this URL is available in the *sample retail-workspace-page-config.xml* file that gets installed with Workspace. You can find this link under the *Admin Tools* folder in the *Tools* worklist.

## Testing an External Application Definition

Once you define the external application, you should test the definition to verify that the external application is configured correctly. To test the external application definition:

- On the **Administer External Application** page ([Figure 4-1, "Administer External Applications Page"](#)), in the **Edit/Delete External Application** section, click the application under the **Application Name** link column. If the configuration is accurate, the application will launch in a new browser window using the current definition.

Figure 4–3 External Application Login page




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**Note:** A user's credentials can be defined the first time the external application is accessed. However, other factors may override this capability.

---

## Obtaining the OSSO External Application ID

Each external application definition has a unique identifier. This identifier is presented in many of the URLs within the OSSO system to launch the application or manage the application's definition within OSSO. You must obtain this external application identification number to configure the launch of the application from Workspace (as an administrator) or to create/modify credentials for this application (as a user).

You can obtain the OSSO external application ID from the *p\_app\_id* parameter found in many of the OSSO URLs. The following figure (Figure 4–4) shows an OSSO External Application with an ID of *B9393469CEC51BDBBD9A8FA37DCDACB2*.

**Figure 4–4 OSSO URL with the External Application ID**



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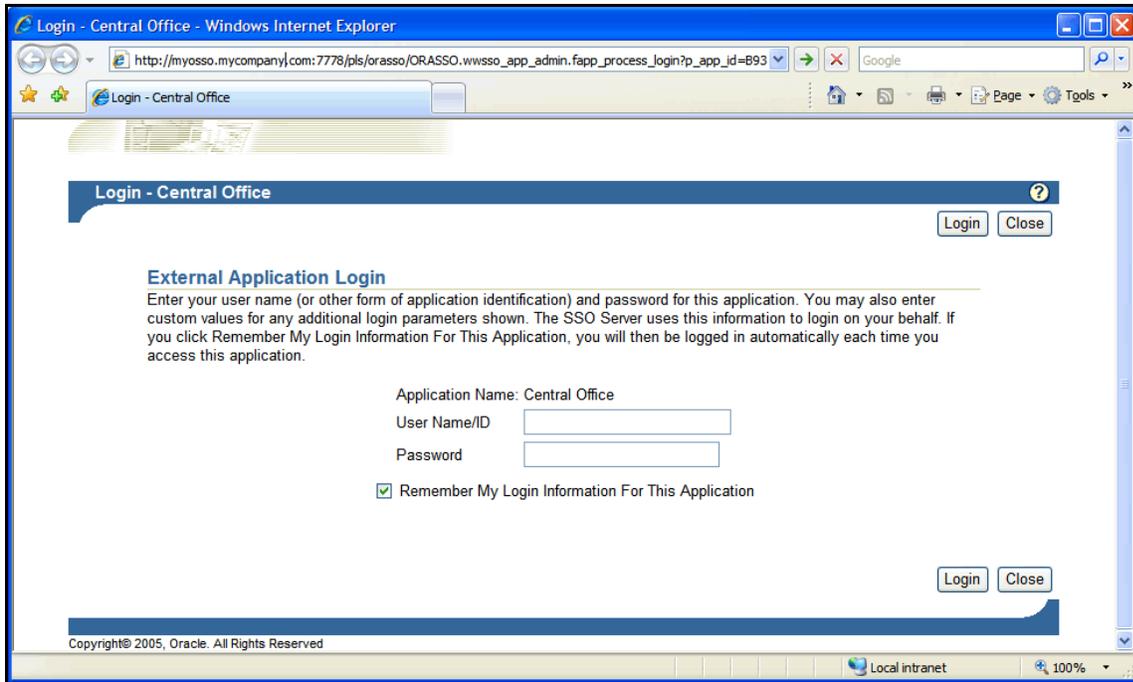
**Note:** This screen appears when you click the **Edit** link for the application on the **Administer External Applications** page.

---

## Managing User Credentials

User credentials are managed on a per application basis. The users are presented with the following page (Figure 4–5) when they attempt to launch an application before defining the relevant credentials needed for that application.

**Figure 4–5 External Application Login page**



The URI and query string segments of the URL are:

/pls/orasso/ORASSO.wwsso\_app\_admin.edit\_fappuser?p\_app\_id=[OSSO ID]

where, *[OSSO ID]* is the OSSO External Application ID. The host/port/scheme portions of the URL are the same as used with DAS.

You may leverage the DAS URL managed bean to find the OSSO host/port/scheme segments when configuring the *retail-workspace-page-config.xml* file. The example below shows an entry used to manage user credentials for Central Office:

```
<secure-work-item id="userCredCentralOffice"
  display-string="Central Office (CO)"
  rendered="true"
  launchable="true"
  show-in-content-area="false">
  <url>#{dasUrl.baseUrl}pls/orasso/ORASSO.wwsso_app_admin.edit_fappuser</url>
  <parameters>
    <parameter name="p_app_id" >
      <value>B9393469CEC51BDBBD9A8FA37DCDACB2</value>
    </parameter>
  </parameters>
</secure-work-item>
```

## Configuring Workspace to Launch External Applications via OSSO

This section details the entries in the Workspace configuration file (*retail-workspace-page-config.xml*) needed for launching and managing the external applications.

All of the examples use the *<secure-work-item>* element. You must create a WorkElement permission grant before any users access these entries in the Workspace application. Permission grants can be created using the Permissions Management feature in Workspace (see [Managing Access to Workspace Components](#)). Alternatively, you may define all of the entries below using the *<work-item>* element, indicating no access control and therefore not secure.

---



---

**Note:** Permission grants are cached by the Oracle Application Server container. This cache may take some time before it is refreshed with new information, depending on the configuration of the *jazn.xml* file. The default cache refresh period is one hour.

---



---

To configure the Workspace application to launch the external applications, the *retail-workspace-page-config.xml* file must contain the following three entries:

- An entry to launch the external applications administration in order to create, update, or delete the external application definitions in OSSO. The OSSO host/port/scheme information may be retrieved from the DAS URL managed bean found within Workspace.

An example of this entry in the *retail-workspace-page-config.xml* file is:

```
<secure-work-item id="adminExternalApps"
  display-string="#{confMsgs.manageExternalApps}"
  rendered="true"
  launchable="true"
  show-in-content-area="false">
  <url>#{dasUrl.baseUrl}pls/orasso/ORASSO.wwsso_app_admin.fapp_list</url>
</secure-work-item>
```

In the sample *retail-workspace-page-config.xml* file, this entry already exists in the *Admin Tools* folder found in the *Tools* worklist.

- An entry to launch the specific external application. This entry will reference the OSSO external application ID to actually launch the URL. This entry may reference the DAS URL bean to find the OSSO host/port/scheme information.

An example of this entry in the `retail-workspace-page-config.xml` file is:

```
<secure-work-item id="launchMyExternalApp"
  display-string="Launch My External Application"
  rendered="true"
  launchable="true"
  show-in-content-area="false">
  <url>#{dasUrl.baseUrl}pls/orasso/ORASSO.wwsso_app_admin.fapp_process_
login</url>
  <parameters>
    <parameter name="p_app_id" >
      <value>B9393469CEC51BDBBD9A8FA37DCDACB2</value>
    </parameter>
  </parameters>
</secure-work-item>
```

- An entry to allow a user to manage the credentials used when launching the external application. This entry is needed in case the user enters the wrong credentials or the credentials change because of some external event. This entry will reference the OSSO External Application ID. This entry may reference the DAS URL bean to find the OSSO host/port/scheme information.

An example of this entry in the `retail-workspace-page-config.xml` file is:

```
<secure-work-item id="userCredForMyExternalApp"
  display-string="Manage Credentials for My External Application"
  rendered="true"
  launchable="true"
  show-in-content-area="false">
  <url>#{dasUrl.baseUrl}pls/orasso/ORASSO.wwsso_app_admin.edit_fappuser</url>
  <parameters>
    <parameter name="p_app_id" >
      <value>B9393469CEC51BDBBD9A8FA37DCDACB2</value>
    </parameter>
  </parameters>
</secure-work-item>
```

## Sample External Application JavaScript and HTML

The OSSO *External Application* facility cannot by itself launch all external applications because of the wide variability in application architectures and implementations.

Also, recent versions of Microsoft Internet Explorer do not support the URL supplied by OSSO for applications using BASIC authentication.

In many cases, launching an application may require the use of additional software, such as JavaScript, to handle these applications. Workspace includes a set of sample HTML and JavaScript files which provide transparent log-on capability for many external applications. An example of an application that may be launched by these scripts is Oracle Retail Central Office. For more information on these scripts, refer to the *Oracle Retail Workspace Implementation Guide*.

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