Oracle® Retail Workspace

Administration Guide

Release 13.0

April 2008

ORACLE®

Oracle® Retail Workspace Administration Guide, Release 13.0

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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

> **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.

Related Documents

For more information, see the following documents in the Oracle Retail Workspace Release 13.0 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

For a base release (".0" release, such as 13.0), Oracle Retail strongly recommends that you read all patch documentation before you begin installation procedures. Patch documentation can contain critical information related to the base release based on the new information 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:

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:

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

1

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 to Oracle Retail applications from a single point and the ability to configure the access to other applications.
- Role-based Authorization – ability to grant permissions to the resources based on a user's business role.

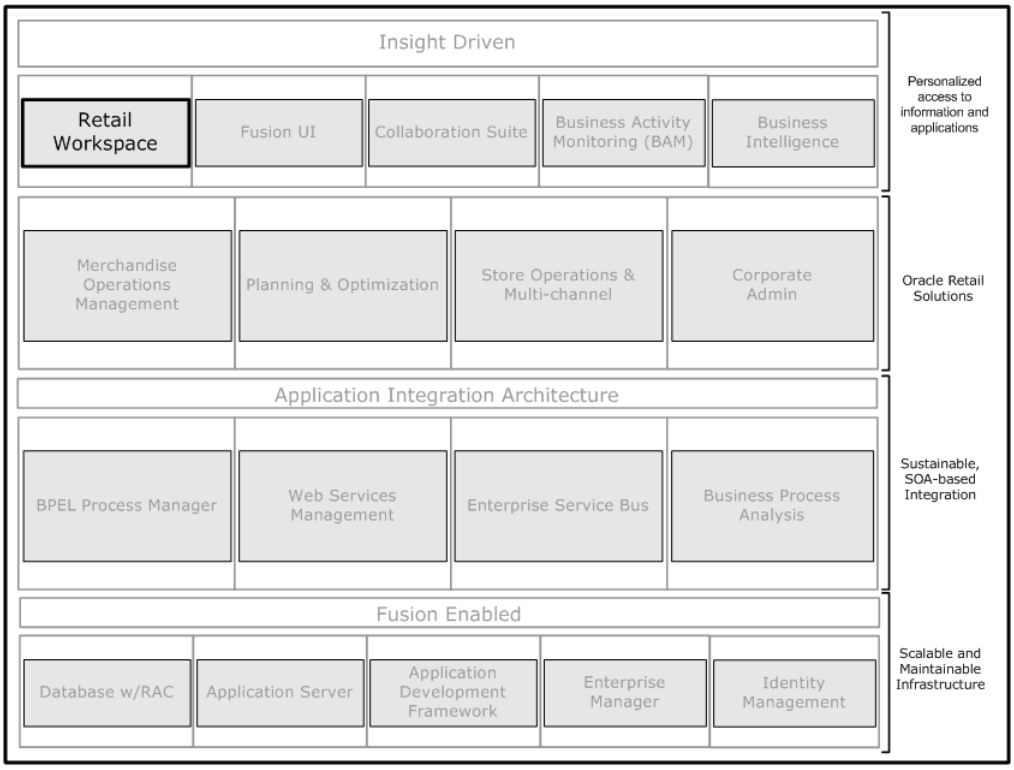
Note: Most of the user and administrative tools are links to the Oracle Internet Directory (OID) Delegated Administrative Services (DAS) application.

Where Does Workspace Fit in a Retail Enterprise

The illustration below shows a 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 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, and RSS feeds 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.

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

Portlets

A portlet is a reusable Web component building block that displays reports, Web pages, HTTP links, and RSS feeds. Workspace provides the ability to create JSR 168 portlets capable of displaying content in these formats.

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

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 SSO system through an application other than the Workspace, the user is pre-authenticated for Workspace access (Note that the user must be a member of the *Oracle Retail Workspace User* role) and can access the features in the Workspace or other SSO-enabled reports or applications.

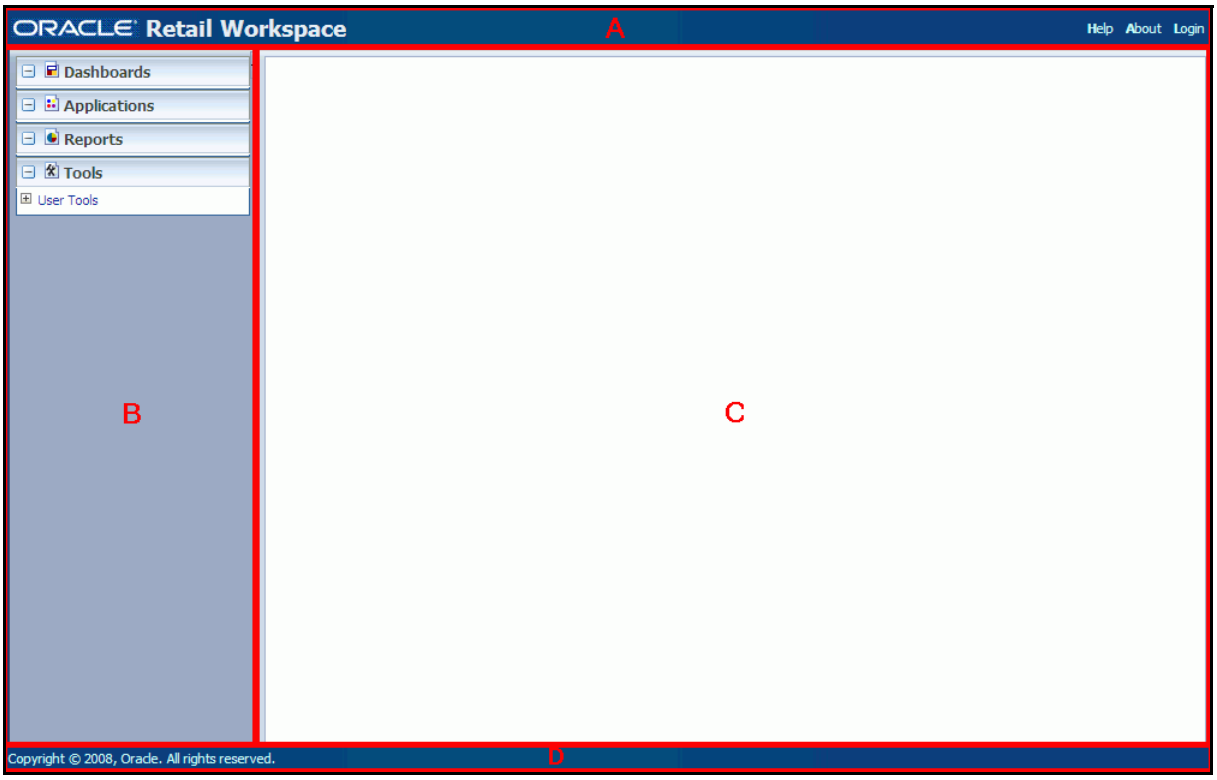
Understanding the Workspace User Interface

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 and contains the following worklists: ■ Applications ■ Dashboards ■ Reports ■ Tools
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 Location, 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.

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.

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

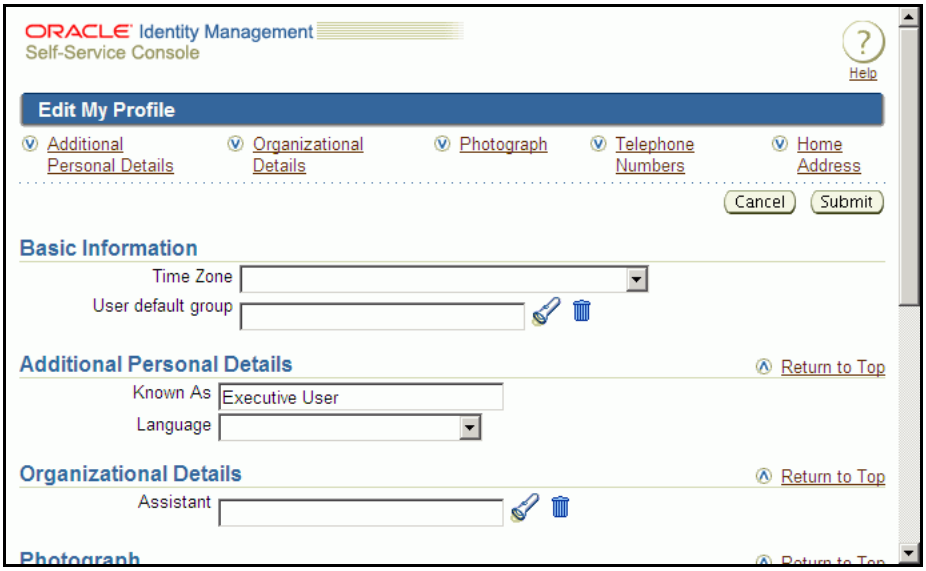
Setting Up Hint Question and Answer

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:

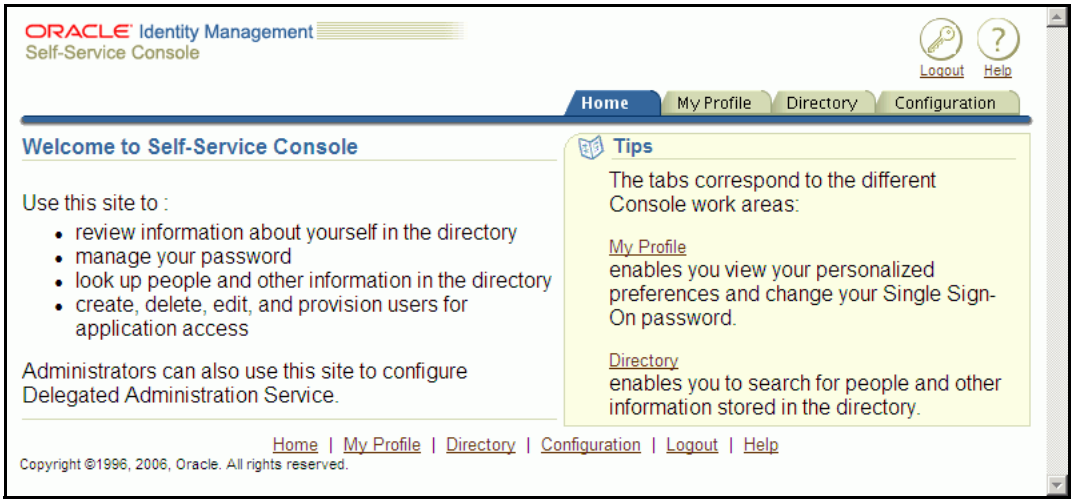
1. In the Navigation pane, under the **Tools** section, click **User Tools**.
2. Under the **User Tools** menu, click **Edit My Profile**. The **Oracle Identity Management Self Service Console** appears.

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



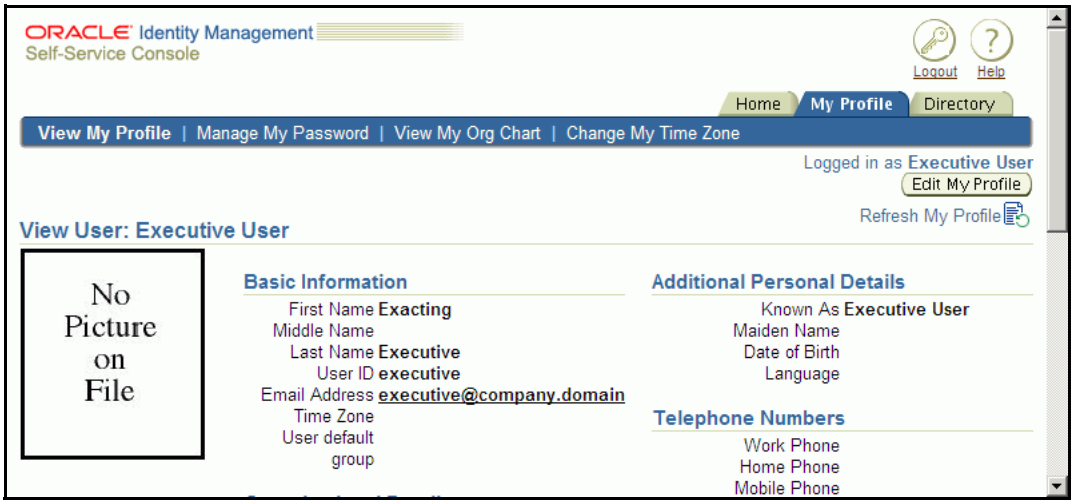
5. Click the **My Profile** tab

   Or

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

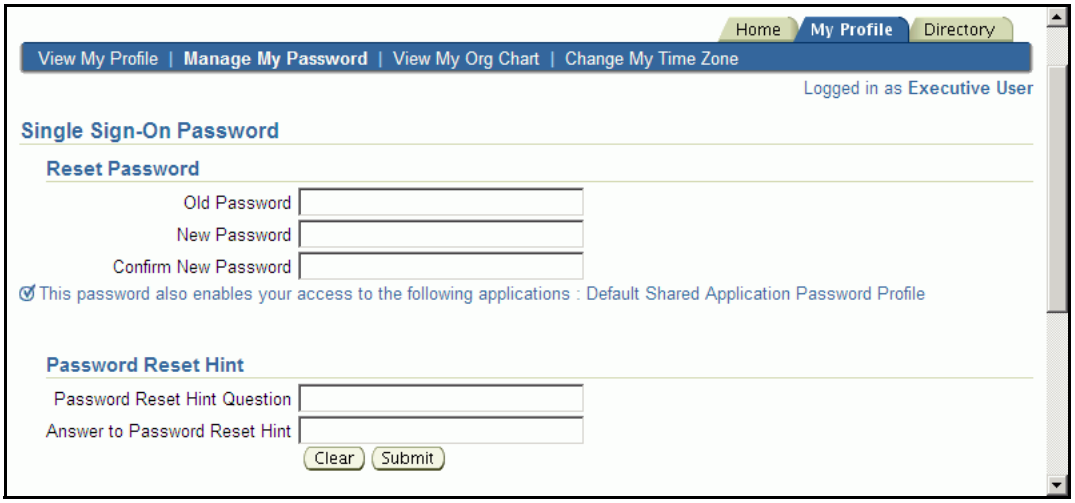
6. On the **My Profile** tab, click **Manage My Password**. The **Manage Password** page appears.

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



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.

2

Working with Workspace

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

This chapter includes the following sections:

- Working with the Dashboards
- Launching Retail Applications
- Working with Reports

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 Applications

Workspace provides the ability to launch Oracle Retail applications using the Single Sign-On mechanism. It also provides the ability to launch third party applications that can be accessed using a URL. The ability to access the applications is based on the roles associated with your user account.

Once configured, all the available applications appear under the Application worklist (in the Navigation pane). The applications are organized under the SSO and Non SSO applications categories.

To launch an application:

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

Applications Supported Through the SSO System

The following Oracle Retail applications (Release 13.0) are supported through the Single Sign-On (SSO) 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)

Working with Reports

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

Once configured, all the available reports appear under the relevant Report Tools section in the Reports worklist. When you click on a report, the Report screen appears in the content area.

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

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

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 screen appears in the Content area of the Workspace.

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

3

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 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

> **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*.

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

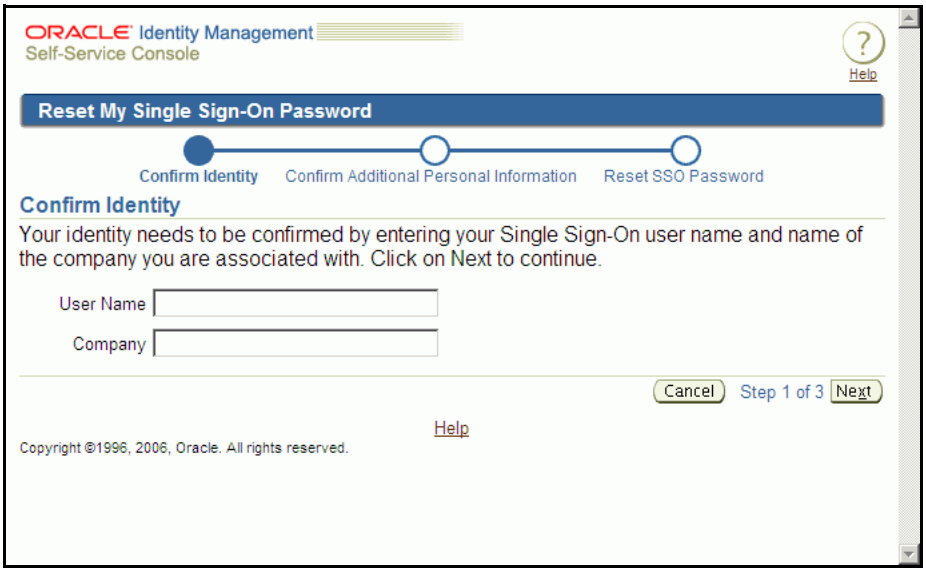
Use the *Reset Password* feature to change or reset the password associated to your user account.

> **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.

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



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

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

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.

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:

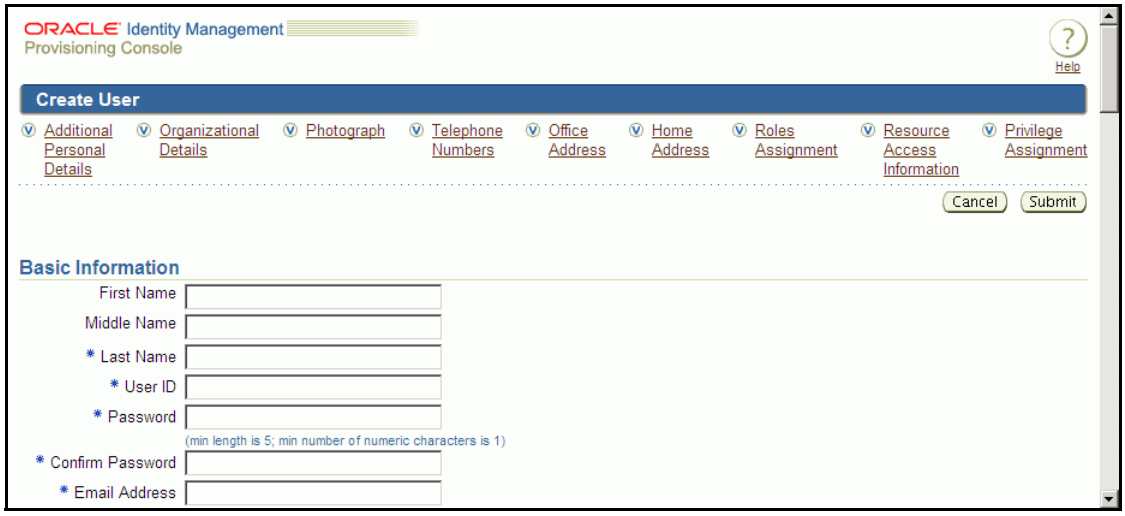
- If you need to add one or two user accounts, see Creating a Single User Account.
- If you need to create multiple user accounts all at once, use the Bulk Load feature. For more information, see Creating Multiple User Accounts.

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.

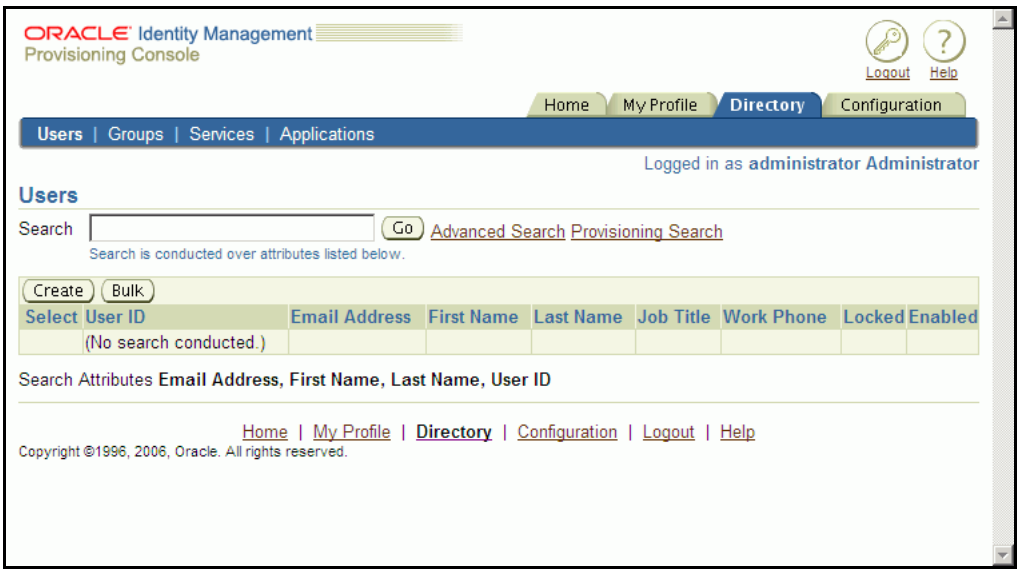
Note: The Bulk load features requires that you upload an LDAP Data Interchange Format (LDIF) file set up with the new user accounts. Before you access the Bulk load feature, ensure that the LDIF file is set up with the user accounts.

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:

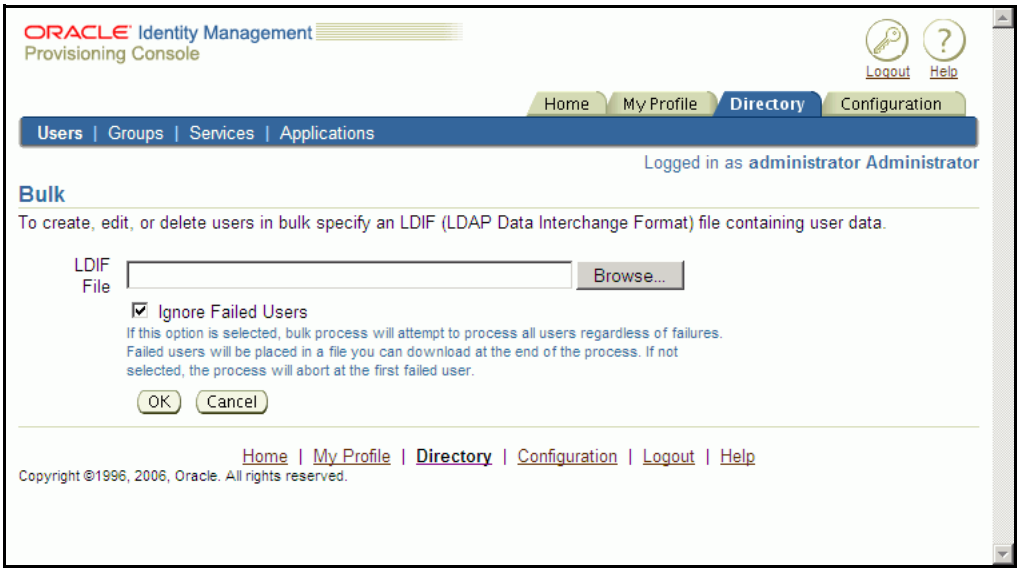
1. Navigate to the **Oracle Identity Management Provisioning Console** home page. You can use the following steps:
   a. On the Navigation pane, under the **Tools** worklist, expand **Admin Tools**.
   b. In the **Admin Tools** section, click **Create User**. The **Oracle Identity Management Provisioning Console** appears.
   c. Click **Cancel**. The **Provisioning Console** home page appears.
2. On the **Provisioning Console** home page, click **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**, select the LDIF file set up with the new user accounts, and click **OK**.
5. Click **OK**.

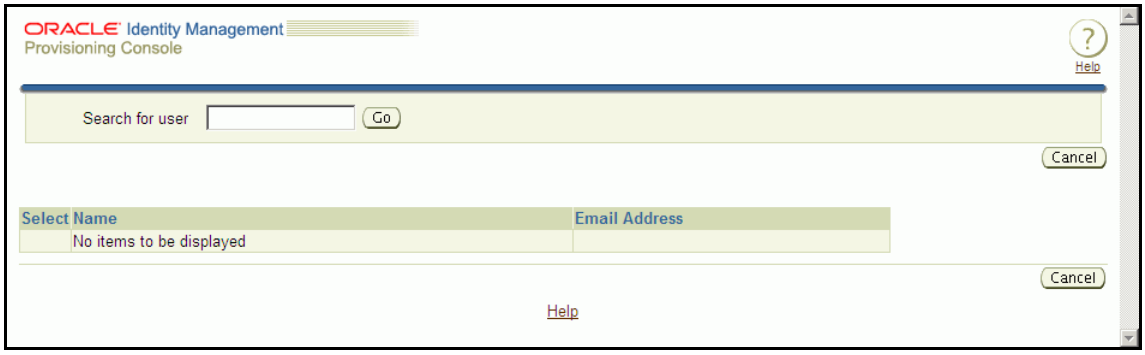
Editing a User

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

To edit an 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 an 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.

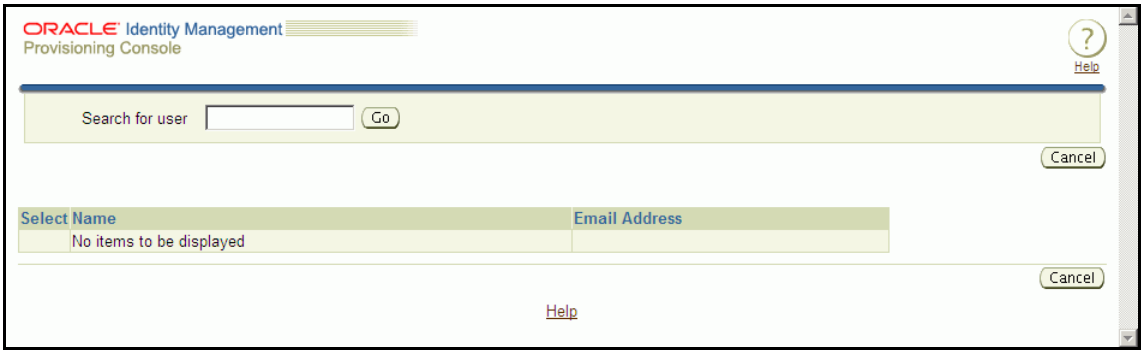
Deleting a User

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

To delete an 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)

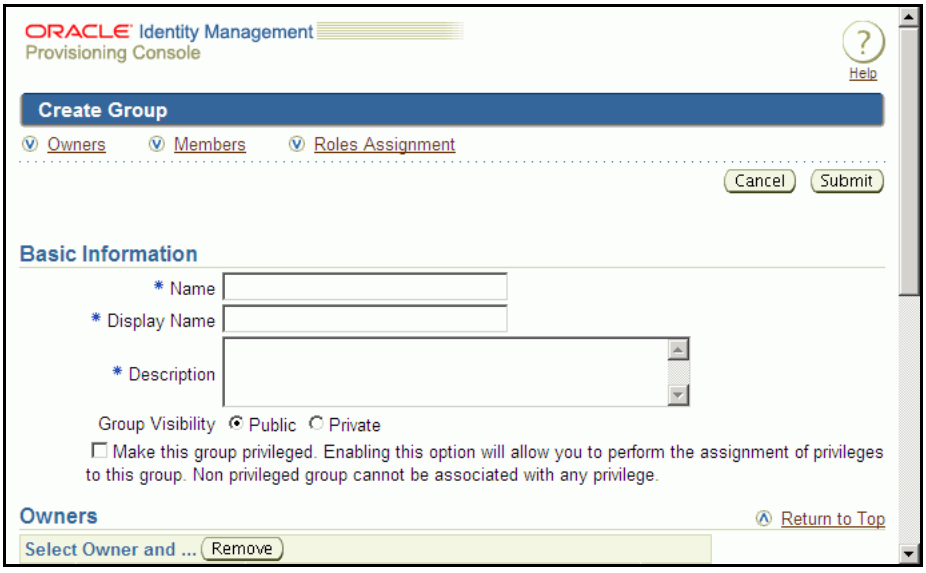
Use the *Create Role (Group)* feature to create role-based groups.

> **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.
   - **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**.

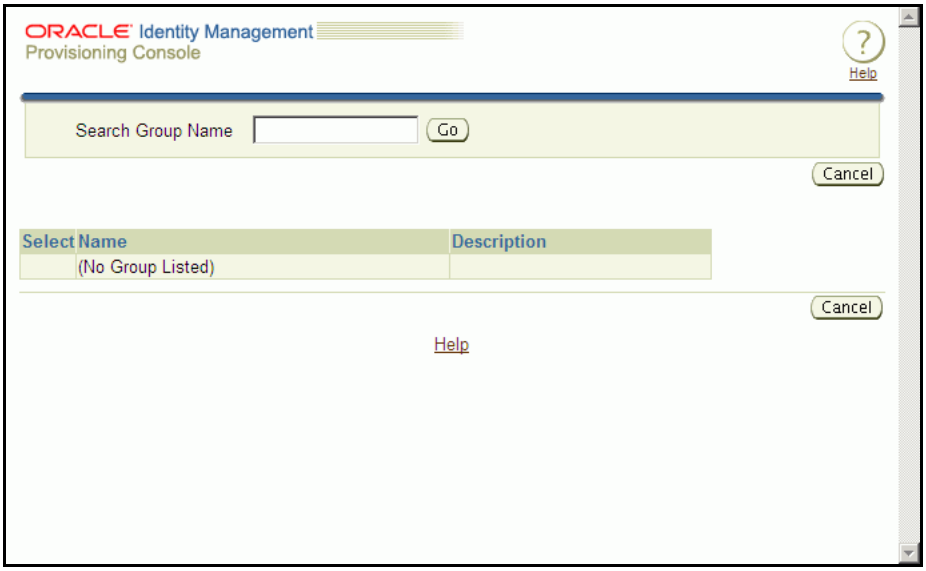
Editing a Role (Group)

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.

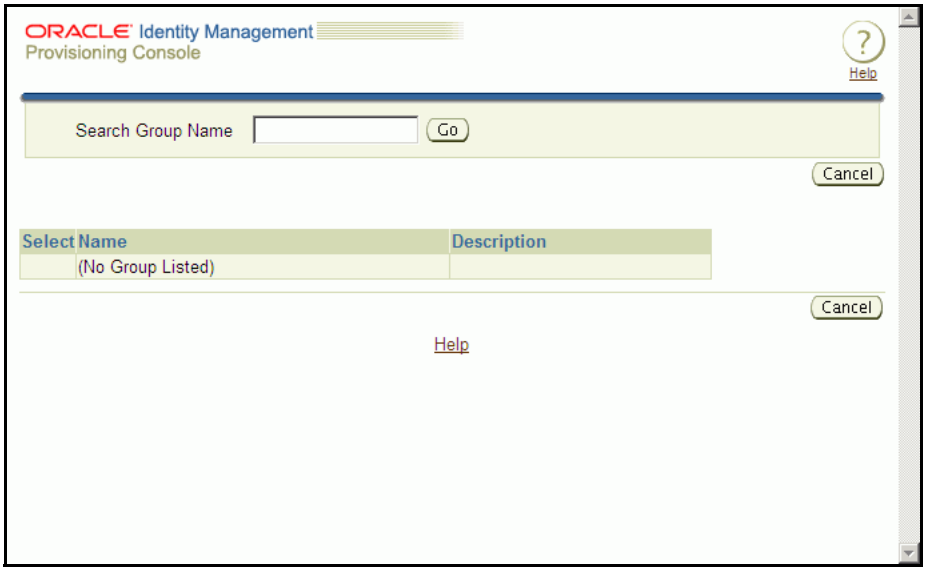
Deleting a Role (Group)

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 elements and nodes that form part of the Workspace framework. This includes access to the dashboards, applications, reports, and tools sections of the application.

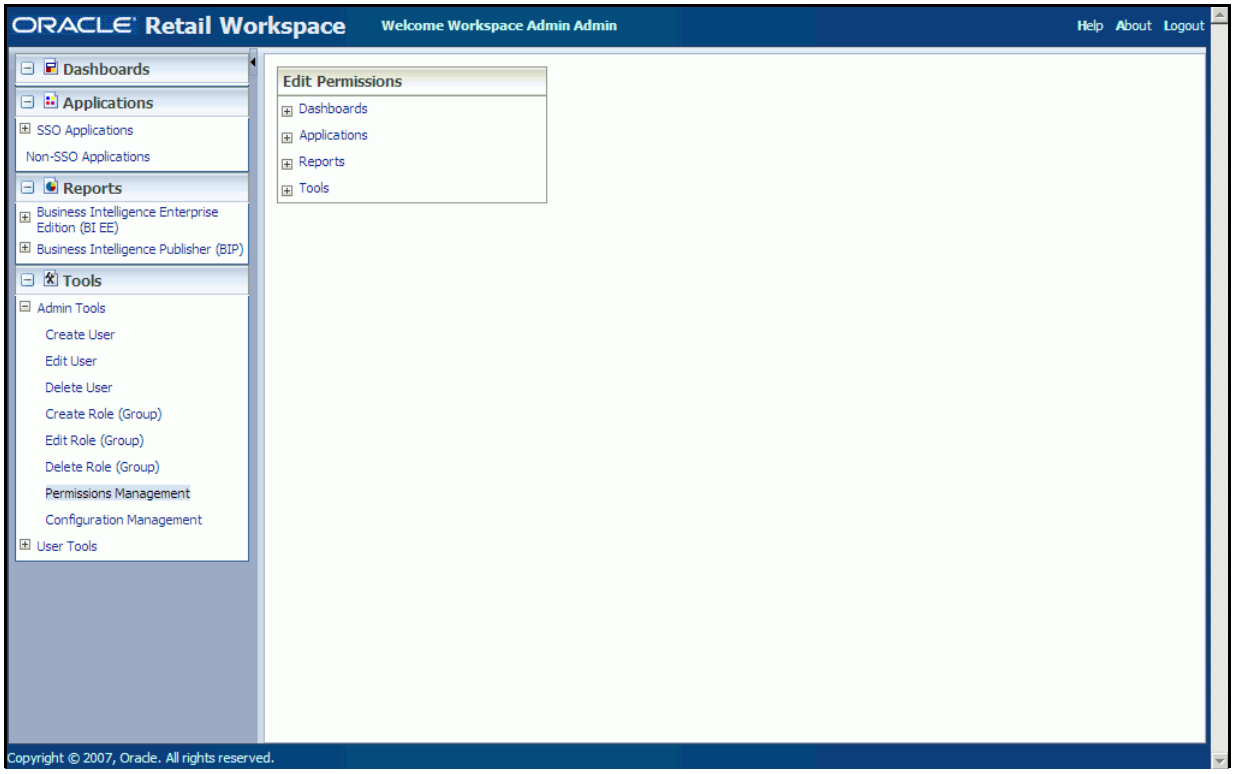
Each secured work element will only be displayed to a user when you grant the user appropriate access permissions for that work element. You can assign the access permissions to a specific user or to a group of users (role).

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 work element:

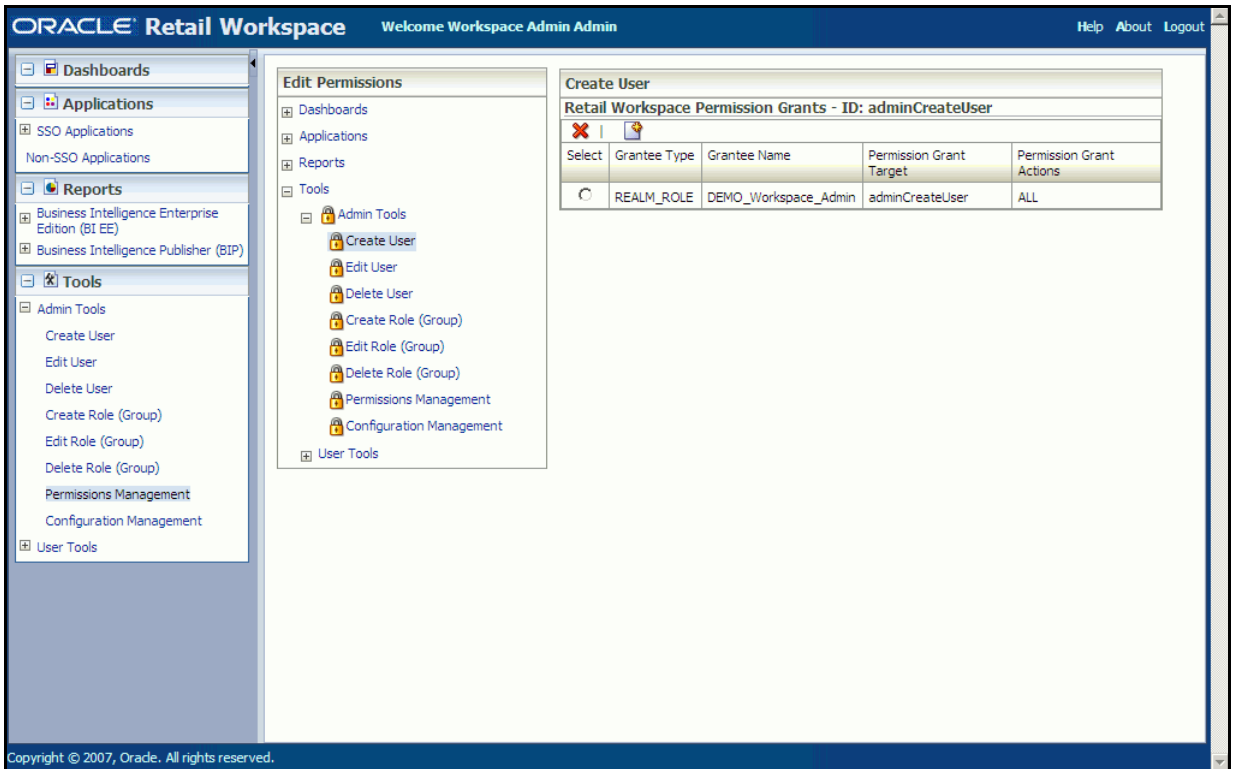
1. On the Navigation pane, under the **Tools** worklist, expand **Admin Tools**.
2. In the **Admin Tools** section, click **Permissions Management**. The **Edit Permissions** page appears in the Content area and displays the work elements in a hierarchy tree structure as they appear in the Navigation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

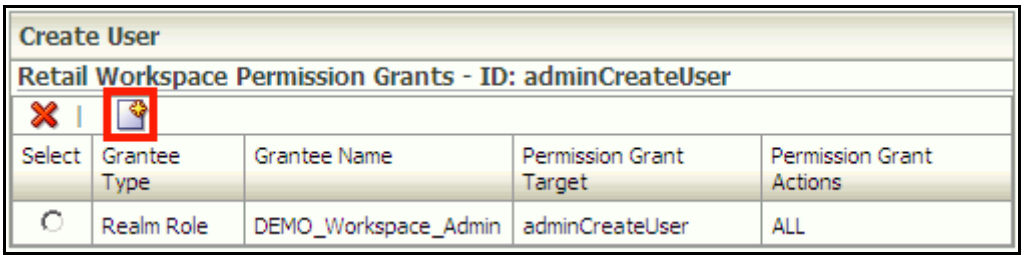
Figure 3–11 Permission Grants Area



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

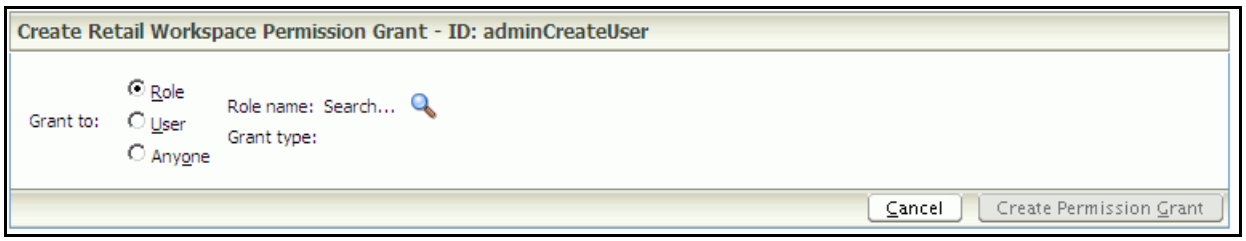
4. Click **Add New Retail Workspace Grant** to grant permissions to this work element for a specific user or role. The **Create Retail Workspace Permission Grant** screen appears.

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 Anyone role.

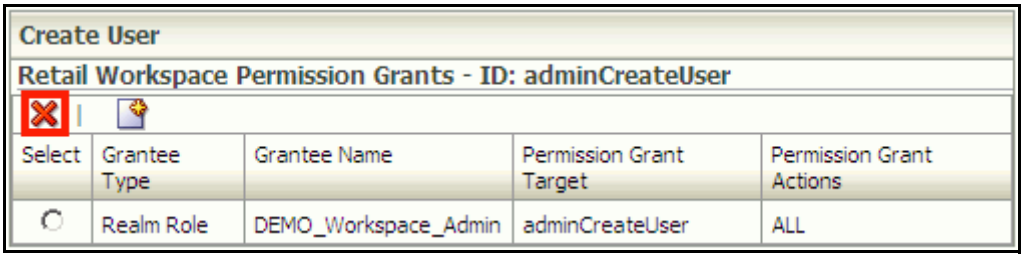
   ---

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, and then click **Delete Selected Retail Workspace Grant**.

Figure 3–14 Delete Selected Retail Workspace Grant Icon



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