

Oracle® Retail Central Office

User Guide

Release 12.0

September 2007

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Preface

This document describes how to use Oracle Retail Central Office.

Audience

This document is intended for the following users:

- Managers who manage and track information relating to store management and financial issues.
- System Administrators who configure and maintain working data relating to the store hierarchy, user security, and job management.

Related Documents

For more information, see the following documents in the Oracle Retail Central Office Release 12.0 documentation set or in the Oracle Retail Strategic Store Solutions Release 12.0 documentation set:

- *Oracle Retail Central Office Release Notes*
- *Oracle Retail Central Office Installation Guide*
- *Oracle Retail Central Office Operations Guide*
- *Oracle Retail Strategic Store Solutions Configuration 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 12.0), 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 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.
<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.

Overview

In a retail business, most critical functions are done at the corporate level. Most stores operate without the timely, complete information needed for completing a sale. The corporate office lacks the timely view and control of operations that would enable it to optimize store sales and profitability.

The Oracle Retail Central Office application is used at the corporate office to correct these problems. It makes it easy to manage data movement and access real-time information. Oracle Retail Central Office provides the following benefits:

- Parameter management provides easier and consistent implementation of store policies
- Management of transactions and the electronic journal, including access to electronic customer signatures, supports audit and loss prevention activities
- Data management capabilities help leverage workflow technologies
- The design of the application at the technology and application levels provides the flexibility to meet the unique business needs of a retailer

This chapter provides an overview of the Oracle Retail Central Office application.

The following topics are discussed:

- [Getting Started](#)
- [User Interface](#)
- [Security and Errors](#)

Getting Started

This section explains how to start Oracle Retail Central Office, log in, and log out.

Note: This guide assumes that you are familiar with using a web browser.

Starting the Application

To start the application, open a web browser. Enter the URL for your Oracle Retail Central Office web page: `http://<servername>:<portnumber>/centraloffice`.

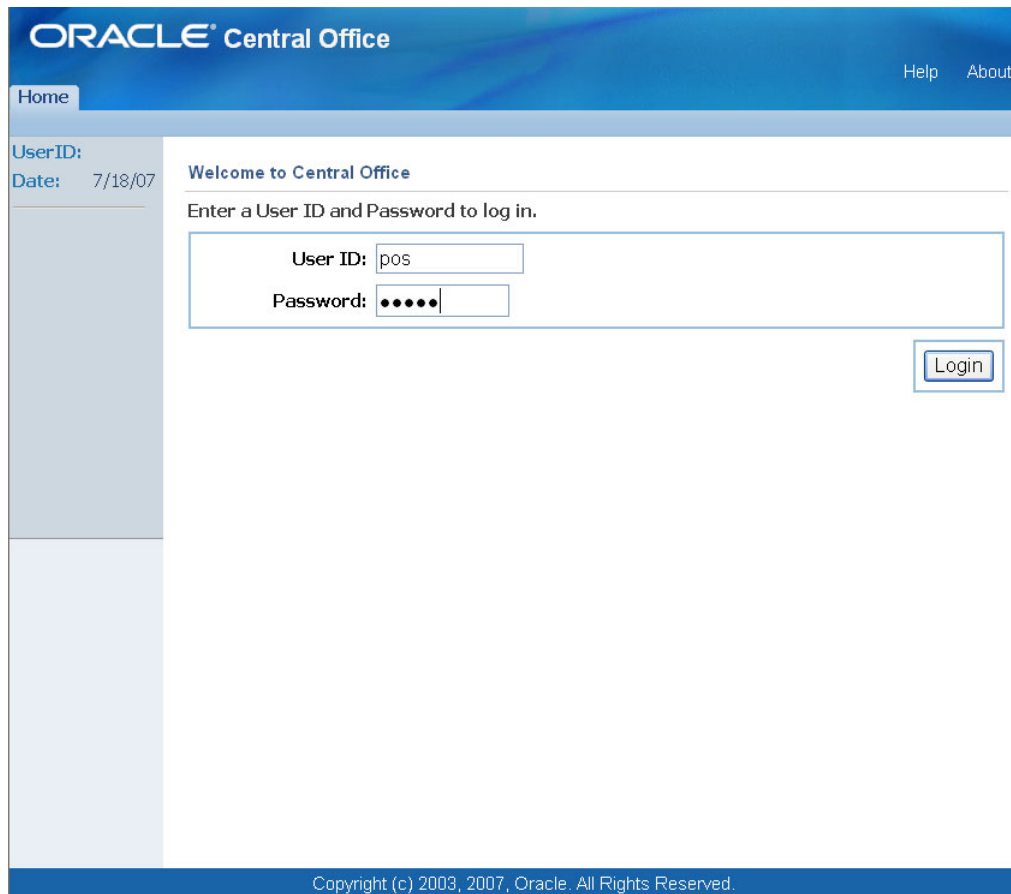
Logging In

On the login screen, enter a valid user ID and password. Click **Login**.

Note: Passwords are case sensitive.

For information on how passwords are handled by Oracle Retail Central Office, see [Passwords](#).

Figure 1–1 Login Screen



If you entered a temporary password or a password that has expired, the Change Password screen is displayed. See [Figure 2–2](#). You must change your password before you can access the application.

After you successfully log in, the Dashboard is displayed. For more information on the Dashboard, see [Chapter 2](#).

Note: When you are done using Central Office, log out and close the browser window. This ensures that your session information is cleared and prevents another user from accessing Central Office with your login information.

Logging Out

To log out from the application, click **Logout** at the top right of the application screen. See [Figure 1-2](#) for the location.

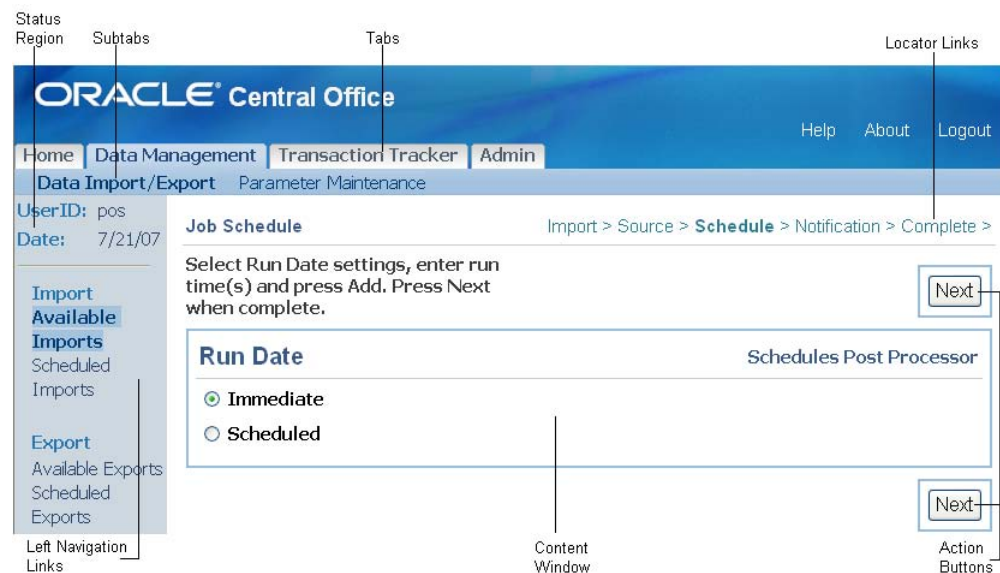
User Interface

This section provides an introduction to the application screen.

Screen Regions

The following figure shows the parts of the application screen.

Figure 1-2 Example Showing Parts of the Application Screen



The layout of the screen is consistent for each feature:

Tabs

Click a tab to choose the feature you want to use.

Subtabs

Each feature has one or more functions available. The row of subtabs lists the available functions. Click a subtab to choose the function you want to perform. The left navigation links and content window are updated for that function.

Left Navigation Links

Each subtab has a set of links that show the functions that can be performed on the data. Click a link to perform that function. The content window is updated for that function.

Action Buttons

Click a button to perform the action. The content window is updated as a result of performing the action.

Content Window

This section of the screen changes when you click a tab, subtab, link, or action button. The content is unique for each function. Depending on the selected function, you perform different operations:

- View data
- Make choices by selecting items
- Enter data into fields

Locator Links

Some functions involve a sequence of steps. When this occurs, the locator links show the steps in the process to complete that function. The step that you are currently on is highlighted in bold.

For example, in [Figure 1-2](#), this screen is the third step of the process to import data into the corporate database. You can see that the next step in the process would be to choose the users to be notified of the import job success or failure.

Status Region

The logged in user ID and current date are displayed.

Navigation

This section provides a general description of each of the tabs. Clicking a tab displays a new screen devoted to the tab's features. The remaining chapters of this guide provide detailed information on each tab. [Table 1-1](#) lists the chapter that contains more information for each tab.

Table 1-1 *Main Tabs*

Tab	For More Information
Home	See Chapter 2 .
Data Management	See Chapter 3 .
Transaction Tracker	See Chapter 4 .
Admin	See Chapter 5 .

Home

After you log in, the **Home** tab displays the Dashboard, the default screen in Oracle Retail Central Office. The Dashboard gives you access to all the features of Central Office and enables you to change your password.

Data Management

Use the **Data Management** tab to manage store, operations, and sales data:

- Import and export data between the corporate database and stores, third-party applications, and data files
- Add, remove, and edit parameter lists

Transaction Tracker

Use the **Transaction Tracker** tab to query, view, and export information on the following types of data:

- Transaction
- Electronic Journal
- Signature Capture
- Customer Data

Admin

Use the **Admin** tab to configure and maintain working data in the following categories:

- Store Directory
- Users
- Roles
- Job Manager
- Parameter Maintenance
- Tasks

Help

Use the **Help** tab to get information about the feature you are using. When you click **Help**, a separate window opens to display the information.

About

Use the **About** tab to view copyright and version information for Oracle Retail Central Office. When you click **About**, a separate window opens to display the information.

Locale Support

Locale support means tailoring the information displayed on a screen and accepting user entered data in a format that meets the conventions of the locale, or geographic region, where the application is being used. In Oracle Retail Central Office, limited locale support is provided to enable the date, time, currency, and calendar to be displayed in the default locale chosen for the application. For more information, see the Oracle Retail Central Office Operations Guide. All screens and examples in this guide use the English - United States locale.

Security and Errors

This section provides an overview of how security and errors are handled in Oracle Retail Central Office.

Passwords

Passwords are used to restrict access to Oracle Retail Central Office. The requirements for passwords are defined by the retailer. Requirements can include the definition of password length and content. For example, you may need to enter a password that is at least five but not more than ten characters and includes at least one numeric character. For information on your password requirements, consult your system administrator. For information on setting up password requirements, see the Oracle Retail Central Office Operations Guide.

Passwords can be set to expire within a specific number of days after being set. During login, if you are warned that your password is about to expire, you can choose to change your password at that time. If you do not change your password before it expires, you may be locked out from logging into the application. If you are locked out, a system administrator must reset your password. You will be assigned a temporary password that you must change immediately at your next login. You may also be locked out after a specific number of invalid login attempts.

For information on changing your password, see [Change Password](#) in [Chapter 2](#).

Roles

Oracle Retail Central Office security restricts access to functions and data by the use of security roles. Each role identifies those functions that a user is allowed to perform. A security role is assigned to your user ID.

For example, your defined role might allow you to see tasks, but not add or remove any tasks.

If you are not allowed to use a function, the tab or link for that function is not displayed on the screen. Also, you can work with parameters only for your assigned store hierarchy.

For more information on roles, see [Chapter 5](#).

Timeout Interval

If there has been no activity at your application screen for a specified period of time, you must log in again before you can perform any functions. This prevents an unauthorized person from getting access to your work. The period of time before you have to log in again is set by your system administrator.

For example, you leave your desk after viewing a list of transactions. When you return, you select a transaction to see details. The login screen is displayed, and after you log in again, the details for the transaction are displayed.

Error Handling

For errors in data entry, messages in red are displayed in a box at the top center of the content window. If there are multiple errors on a screen, you see an error message for each error. The field that contains incorrect data is also highlighted.

If you enter criteria for a search that results in no matches, an error message is displayed at the top of the content window.

The Home tab provides access to the Dashboard and change password functionality. Each of these functions can be accessed by clicking a left navigation link.

Dashboard

After logging in or when the Home tab is clicked, the Dashboard is displayed. The Dashboard provides access to all the features of Oracle Retail Central Office.

Figure 2-1 Dashboard Screen



Change Password

To change your password:

1. On the Dashboard, click the **Change Password** left navigation link. The Change Password screen is displayed.

Figure 2–2 *Change Password Screen*

Change Password

Enter your current Password, then enter your New Password and select Update.

User ID: pos

Current Password: *

Enter New Password: *

Confirm New Password: *

* = Required Field

2. Enter your current password.
3. Enter your new password.
4. Enter your new password again to confirm the change.
5. Click **Update**. Your password is changed to the new password.

Data Management

Data Management provides the capability to manage and control the distribution of critical information updates between the corporate office and stores. This ensures timely update and consistent store policies. Data Management provides the following benefits:

- Flexibility in configuring what data needs to be sent where and when
- Import and export of defined sets of data
- Scheduling of data distribution jobs
- Process for handling approval of data distribution
- Notification of a job's status to your Tasks list or e-mail (Any hand-held device that is able to receive e-mail can be used)
- Acknowledgement from stores of the receipt of data

For information on each available function, see the following sections:

- [Data Import/Export](#)
- [Parameter Maintenance](#)

Data Import/Export

Click **Data Import/Export** to work with the distribution of data. You can import defined sets of data into Oracle Retail Central Office. You can also export any type of file to the Oracle Retail Back Office application. Click a left navigation link to choose an import or export function.

Importing Data

On the Available Imports screen, you can select the import task to be performed. [Table 3-1](#) describes the available import tasks.

Table 3-1 Description of Import Tasks

Task	Description
Import POSlog	<ul style="list-style-type: none"> ■ Used for single instances of a POSlog import, such as after a POSlog error has been corrected and a POSlog file must now be manually imported. ■ Imports the XML representation of retail transaction data using IXRetail's version 1 and 2 schema with extensions by Oracle Retail. ■ Writes to the centralized corporate database.

Table 3–1 (Cont.) Description of Import Tasks

Task	Description
Import Electronic Journal	<ul style="list-style-type: none"> Used for single instances of an electronic journal import, such as after an error has been corrected and an electronic journal file must be manually imported. Imports XML representation of electronic journal blob with minimal key information per transaction, journal entry, including store, register, date, and transaction sequence number. Writes to the centralized corporate database.
Import Parameters for Distribution	<ul style="list-style-type: none"> Used whenever new parameters must be added to the master set. Must be performed initially when the application is installed. Imports XML divided into parameter groups. Defaults to include the distributable and master set, both XML and database-stored parameters for the Oracle Retail Back Office and Point-of-Service applications.
Import Application Parameters	<ul style="list-style-type: none"> Used whenever new parameters must be added to the Oracle Retail Central Office set. Must be performed initially when the application is installed. Imports XML divided into parameter groups. Includes the parameters used to control behavior in the Oracle Retail Central Office application. For more information on specific parameters, see the Oracle Retail Strategic Store Solutions Configuration Guide.
Transaction Post Processor	<ul style="list-style-type: none"> Creates summary data for use in reporting. Should be scheduled to run on a repeating basis, after system installation, so that the transactions coming in via the POSlog are summarized for reporting.

To import data, click **Available Imports**. The Available Imports screen is displayed.

Figure 3–1 Available Imports Screen

Available Imports [Import](#) > [Source](#) > [Schedule](#) > [Notification](#) > [Complete](#)

Select a source to schedule the import to run.

Import Task Name	Task Description	Source
Import POSlog	Imports transaction and signature capture data into the Central Office database.	File
Import Electronic Journal	Imports electronic journal information into the Central Office database.	File
Import Parameters for Distribution	Imports parameters to add to the master parameter set for distribution to other applications.	File
Import Application Parameters	Imports the application specific parameters.	File
Transaction Post Processor	Post Processor Scheduler.	Schedule

Table 3–2 describes the information shown for each available import.

Table 3–2 Available Imports Columns

Column	Description
Import Task Name	The task that is performed
Task Description	The type of data that will be imported
Source	File means you first choose the source file to be used for the import and then set the schedule for the distribution Schedule means you do not choose a source file, you only need to set the schedule

Scheduling an Import

An import task can be chosen and then scheduled.

Choosing the Source Data to Import The Select Source - File screen is used to select the file for the import. The source for an import is either File or Schedule. If the source is File, you first choose the source file for the import. If the source is Schedule, you do not select a file.

To choose a file to be imported:

1. Click **File** in the Source column for the data you want to import. The Select Source - File screen is displayed.

Figure 3–2 Select Source - File Screen

Select Source - File Import > Source > Schedule > Notification > Complete

Enter file location and name, and press Next.

Import Electronic Journal

Import file path/name: *

* = Required field

2. Enter the path name of the file or click **Browse**. Your web browser provides a window for searching for the file.
3. Click **Next**. The Job Schedule screen is displayed.

Setting the Schedule for the Import The Job Schedule screen enables you to set the import job to run immediately or set up a schedule for the job. The default is Immediate.

Figure 3–3 Job Schedule Screen

Job Schedule Import > Source > **Schedule** > Notification > Complete >

Select Run Date settings, enter run time (s) and press Add. Press Next when complete. Next

Run Date Import Electronic Journal

Immediate

Scheduled

Begin Date: (dd/MM/yy)

Repeating

End Date: Last Run Date: (MM/yy)

Duration: Days

No End

Repeat:

Run Time

Time:

Choose Add to add a new scheduled time, or to remove a scheduled time select the checkbox and choose Remove.

Scheduled Times	
<input type="checkbox"/>	11:00 AM

Next

If you want the job to run immediately, click **Immediate** and then click **Next**. The Notification screen is displayed. See [Setting the Notification](#).

To select the run date and time for the job:

1. Click **Scheduled**. Additional fields appear on the screen.
2. Set the Begin Date.

The default is the current date.

Enter the date into the field or click the calendar button to bring up a calendar. You can search through the calendar and select the date you want.

3. If you want the job to run on a repeating basis, click **Repeating**.

Additional fields appear on the screen.

a. Set the End date.

The default is No End.

b. Set when you want the job to repeat.

The default is to repeat Daily at a specific Start Time.

You can set the import to repeat Daily at a specific Start Time or Interval, Weekly on a specific day, or Monthly on a specific week and day.

4. Set the Run Time for the job.

Run time can be entered in either 12-hour format or 24-hour format. To use 12-hour format, enter the time in hour:minutes am or pm, for example, 5:15 am. For 24-hour format, or military time, the allowed time is in the range of 0:00 to 23:59.

a. Add or remove scheduled times from the list.

If you specified the job to run on a daily interval, enter the interval and click **Add**. For example, if you want the job to run every five minutes, enter 0:05.

Otherwise, enter the time you want the job to run and click **Add**. You can specify multiple times.

If you want to remove a time from the list, check the box by the time and click **Remove**.

b. Click **Next**. The Notification screen is displayed.

Setting the Notification On the Notification screen, you can select users to be notified whether a scheduled job succeeds or fails. You set the method and recipient for the notification.

Figure 3–4 Notification Screen

Notification Import > Source > Schedule > Notification > Complete >

Enter settings and press Add to add to the notification list. Next

Add Notification Import Electronic Journal

Notify of: Method: Recipient: Add

Existing Notifications

Remove

Select to Remove	Notify of	Method	Recipient
<input type="checkbox"/>	All	Email	pos@oracle.com

Next

To set the notification:

1. Add or remove notifications.

To add a notification, choose whether to Notify of Success, Failure, or All. Choose the method. If you choose Dashboard, the notification is displayed in your Tasks list. See [Figure 5–12](#). If you choose e-mail, enter the full e-mail address of the recipient, for example, pos@oracle.com. Click **Add**. The notification is added to the list of Existing Notifications.

By default, notification of job success or failure is sent to the Tasks list of the user who scheduled the job.

To remove an existing notification, check the box in the Select to Remove column. A check in the box means the notification is set to be removed. Click **Remove**. All the entries that have a checked box in the Select to Remove column are removed at the same time.

2. Click **Next**. The Distribution Summary screen is displayed.

Completing the Job Scheduling The Distribution Summary screen provides a summary of information about the job to be scheduled. Submit the job for scheduling.

Figure 3–5 Distribution Summary Screen

Distribution Summary List > Values > **Distribution** > Complete

Select Submit Job to schedule the job.

Task Information

Task Name: File Transfer

Job Name:

Job Description: A set of files for transport or importing

Next Scheduled Run: 7/25/07 11:00 AM

Schedule: Repeating: Daily StartTime

Recipients: Import:1:Central Office:04241

Notifications: Email: pos@oracle.com

To complete the job scheduling:

1. If you want to change the Job Name, enter a new name. It is easier to track the job progress if you enter a job name that specifically describes the purpose of the job.
2. Click **Submit Job** to submit the job for scheduling. The Distribution Confirmation screen is displayed.

Note: If you do not select Submit Job, the job is given a status of Created. You then need to schedule the job through the Scheduled Imports screen. See [Working with Scheduled Imports](#) for more information.

The job will run when all the required approvals are obtained.

Confirming the Job Schedule The Distribution Confirmation screen shows the job ID and name of the job to be scheduled.

Figure 3–6 Distribution Confirmation Screen

Distribution Confirmation List > Values > Distribution > Complete

The following is the JOB ID for the Daily Update of EJournal:

4

Select to view job status and details.

To confirm the schedule, click **Done**.

Working with Scheduled Imports

Import jobs that have been scheduled to run are shown on the Schedule Imports screen. You can set a job to run immediately, remove a job from the schedule, and change the run date and notifications.

To work with scheduled imports, click **Schedule Imports**. The Scheduled Imports screen is displayed.

Figure 3–7 Scheduled Imports Screen

Scheduled Imports

Select the appropriate link or action button to continue.

Select to Run Immediately or Remove	Description	Scheduled Run	Recipient	Action Date	Job Status
<input checked="" type="checkbox"/>	POS Schedule: Custom: One Time Notifications: Required Approval:		Import:1:Central Office:04241	July 18, 2007 7/18/07 12:28 PM	Succeeded
<input type="checkbox"/>	A set of files for transport or importing Schedule: Custom: One Time Notifications: Required Approval:		Import:1:Central Office:04241	July 18, 2007 7/18/07 12:29 PM	Created

Table 3–3 describes the information shown for each available import.

Table 3–3 Scheduled Imports Columns

Column	Description
Select to Run Immediately or Remove	A checked box indicates the import can be selected to run immediately or removed
Description	Description of the import, schedule, and method of notification of job success or failure
Scheduled Run	Date and time when the job will next run
Recipient	Recipient of the import
Action Date	Date and time is determined by the status
Job Status	See Table 5–4 for a description of the possible statuses

Note: When you select Run Immediately or Remove, all jobs with the checked box are processed as you selected.

- You can view and change the description of the job.
 - To see a detailed description of the job, click the description. The Scheduled Job Summary screen is displayed. See [Table 5–6](#) for an explanation of the screen.
 - To change the schedule, click **Schedule**. See [Setting the Schedule for the Import](#).
 - To change the notification, click **Notifications**. See [Setting the Notification](#).
- To submit the job, click **Run Immediately**.
The job is submitted. It will run when the required approvals are obtained. See [Completing the Job Scheduling](#) to follow the steps to complete the job submission.

Removing a Job

You can remove any schedule jobs. To remove a job, check the box in the Select to Run Immediately or Remove column. Click **Remove**. Multiple jobs can be removed at the same time.

The Confirm Task Removal screen is displayed. A list of the jobs you selected to remove is shown.

Figure 3–8 Confirm Task Removal Screen

Confirm Task Removal

Remove these tasks?

Description	Scheduled Run	Recipient	Action Date	Job Status
Daily Update of EJournal				
Schedule: Repeating : Daily/StartTime Notifications: pos@oracle.com Required Approval:	July 25, 2007 7/25/07 5:00 PM	Import:1:Central Office:04241	July 25, 2007 7/25/07 7:55 PM	Submitted

- If you do not want to remove all the tasks, click **No**. The checked boxes are cleared on the Scheduled Imports screen.
- If you want to remove the tasks, click **Yes**. The tasks are removed.

Exporting Data

The Available Exports screen lists the available exports and a description of each export.

Note: A listener must be created on the store queue at the receiving application so that the application knows what to do with the particular type of file that has been exported.

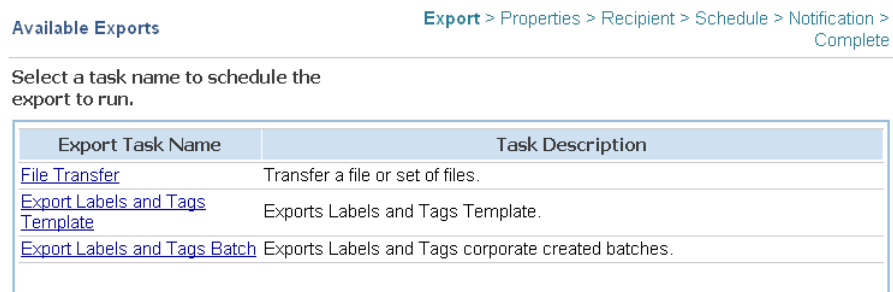
Table 3–4 describes the available export tasks.

Table 3–4 Description of Export Tasks

Task	Description
File Transfer	<ul style="list-style-type: none"> ■ Used to distribute any type of file for which a custom listener has been created on the store queue at the Oracle Retail Back Office application. ■ One or more of any type of file can be attached for distribution.
Export Labels and Tags Template	<ul style="list-style-type: none"> ■ Used to distribute templates for labels and tags to stores. ■ This export is only available if the Oracle Retail Label and Tags product has been installed. ■ Zip files can be attached for distribution.
Export Labels and Tags Batch	<ul style="list-style-type: none"> ■ Used to distribute corporate batches for printing labels and tags. ■ This export is only available if the Oracle Retail Label and Tags product has been installed. ■ Exports XML of the labels and tags content to be printed.

To work with available exports, click **Available Exports**. The Available Exports screen is displayed.

Figure 3–9 Available Exports Screen



Scheduling an Export

Choose the files to export to Oracle Retail Central Office and schedule the distribution job.

Setting the Files to be Exported On the File Selection screen, you select the files:

1. On the Available Exports screen, click the name in the Export Task Name column. The File Selection screen is displayed.

Figure 3–10 File Selection Screen

File Selection Export > **Properties** > Recipient > Schedule > Notification > Complete

Enter a file name and press Add File to add it to the list. Once all of the files have been added to the list, press Next.

Export File Set

File path/name:

Selected Files

Select to remove	File Name	File Type	Size
<input type="checkbox"/>	application.xml	text/xml	159953 bytes

2. Choose the files to be exported.
 - a. To add a file, enter the path name of the file or click **Browse**. Your web browser provides a window for searching for the file. Click **Add**. The file is displayed in the Selected Files list.
 - b. If you want to remove any files from the Selected Files list, check the box in the Select to Remove column. Click **Remove**.
The files are removed from the list.
 - c. When you have chosen all the files you want, click **Next**.
The Set Recipients screen is displayed.

Setting the Recipients The Select Recipient - Stores screen is used to select the recipients of the export. The data can be distributed to any part of your store hierarchy, a list of individual stores, or an ad hoc group of stores. The default recipient is your store hierarchy.

- To choose a part of your store hierarchy:
 1. Click **Hierarchy**. The screen is updated to enable you to select the hierarchy.

Figure 3–11 Select Receipt - Stores Screen

Select Recipient - Stores List > Values > **Distribution** > Complete

Select the appropriate recipient and press Next to continue. Next

Export File Set

Hierarchy
 Individual Stores
 Ad-Hoc Groups

Select the level of hierarchy.

✓ 04241 - Lakeline Mall

Next

2. Click the part of the hierarchy to receive the export. A check next to a node name indicates that node is selected. You can click a triangle next to any node name to display the child nodes or to hide the child nodes from view.
 3. Click **Next**. The Notification screen is displayed.
- To choose a list of stores:
 1. Click **Individual Stores**. The screen is updated to enable you to select the stores.

Figure 3–12 Select Recipient - Individual Stores Screen

Select Recipient - Stores List > Values > **Distribution** > Complete

Select the appropriate recipient and press Next to continue. Next

Export File Set

Hierarchy
 Individual Stores
 Ad-Hoc Groups

Enter store and press Add to add to the list.

Add

Stores included in distribution

Remove

Select to Remove	Store Number	Store Name
<input type="checkbox"/>	04241	Lakeline Mall

Next

2. Add or remove stores from the list:
 - To add a store to the list, enter the store number. Click **Add**. The store is added to the list.
 - To remove a store from the list, check the box in the Select to Remove column. Click **Remove**. All the stores that have a checked box in the Select to Remove column are removed.
 3. When you are done choosing stores, click **Next**. The Notification screen is displayed.
- To choose a group of stores:
 1. Click **Ad-Hoc Groups**. The screen is updated to enable you to select store groups.

Figure 3–13 Select Recipient - Ad-Hoc Groups Screen

Select Recipient - Stores List > Values > Distribution > Complete

Select the appropriate recipient and press Next to continue. Next

Export File Set

Hierarchy
 Individual Stores
 Ad-Hoc Groups

Select the store group to use, or press Add to add a new group.

Add

Select	Store Group Name	Number of Entries
<input type="radio"/>	Test Store Group	2

Next

2. Select the store groups:
 - To select a store group from the list, check the box in the Select column.
 - To add a new group to the list, click **Add**. The Define Group screen is displayed. See [Adding or Changing a Store Group](#) in [Chapter 5](#) for information on adding a group.
3. Click Next. The Notification screen is displayed.

Completing the File Export The remaining steps to complete the export are the same steps followed to complete an import. To follow the steps to complete the file export, see [Setting the Notification](#).

Working with Scheduled Exports

Exports that have been scheduled to run are shown on the Scheduled Exports screen. From this screen, you can set a job to run immediately, remove a job from the schedule, and change the run date and notifications.

The Scheduled Exports function follows the same screens and steps as the Scheduled Imports function. See [Working with Scheduled Imports](#) for information on the screens and steps.

Parameter Maintenance

A parameter is a value that sets an individual characteristic. For example, a parameter called AcceptedTenderIssuers could list all the tenders that are accepted for payment.

A parameter group is a set of parameters that are grouped together by category. This makes it easier to find a specific parameter. A parameter is part of only one parameter group. For example, a group called Discount could contain all the parameters used for applying discounts. If you needed to change a discount, you would know where to find the parameter.

A parameter list is a set of parameters that are bundled together for distribution. The list can be distributed to all stores or groups of stores to override the current values being used.

Working with Parameter Lists

On the Parameter Lists screen, you can create a new parameter list, change the contents of an existing parameter list, or remove parameter lists.

To work with parameter lists, click **Parameter Lists**. The Parameter List screen is displayed.

Figure 3–14 Parameter Lists Screen

Parameter Lists

Select the appropriate action button or link to continue. Add Remove

Select to Remove	Parameter List Name	Created	by
<input type="checkbox"/>	School Year Sale	7/30/07 8:01 AM	pos
<input type="checkbox"/>	New Store Parameters	7/30/07 8:00 AM	pos

Add Remove

For each parameter list, the following information is displayed:

- A checked box in the Select to Remove column indicates the list is to be removed
- Name of the parameter list
- Date and time when the list was created
- User ID of the user who created the list

To add a new parameter list, click **Add**. To edit an existing list, click the name of the parameter list. The List Details screen is displayed.

Adding or Changing a Parameter List

The List Details screen is used to add a new parameter list or change an existing parameter list.

Figure 3–15 List Details Screen

List Details

Select the appropriate action button or link to continue. Save Save & Distribute

New Store Parameters

List Name: List Description: ▲
▼

Update Master Set: Update Application: Update Register Parameters:

Last Modified: 7/30/07 8:01 AM by pos

Parameters in List

Select to add parameters to the list, or select parameters and Remove them from the list. Select the Parameter name to update its value in the list.

Add Remove

Select to Remove	Group	Parameter Name	Value
<input type="checkbox"/>	Base	StoresVATNumber	572 8421 28
<input type="checkbox"/>	Base	TrainingModeOpenDrawer	N

Save Save & Distribute

To define the parameter list:

1. Enter the name and a description of the list.
2. Check the box to select where the parameters will be distributed.
 - **Update Master Set** updates the Oracle Retail Central Office master set of parameter lists.
 - **Update Application** updates the parameters to the Oracle Retail Back Office application.
 - **Update Register Parameters** updates the parameters to the Oracle Retail Point-of-Service application.
3. Choose the parameters for the list.
 - To add parameters to the list, click **Add**. See [Adding Parameters to a List](#).
 - To remove parameters from the list, see [Removing Parameters from the List](#).
4. Save the list you created or changes. You can also schedule a distribution of the parameter list.
 - To only save the list, click **Save**.
The list is displayed on the Parameters List screen.
 - To save and distribute the list, click **Save & Distribute**.
The list is saved and you then schedule the job to export the list. To follow the steps to export the list, see [Setting the Recipients](#).

Adding Parameters to a List

The Select Parameter screen is used to choose the parameters you want added to a parameter list.

Figure 3–16 Select Parameter Screen

Select Parameter

Select a group to view its parameters and their values. Deselect a parameter to remove it from the saved list, or select a parameter to add it to the list, and Press Update List. When done editing, press Return to List.

Update List Return to List

New Store Parameters

Groups: Tax

Select All	Parameter Name	Value
<input type="checkbox"/>	PrintItemTax	N
<input type="checkbox"/>	RequireCertificateInfo	N
<input type="checkbox"/>	RequireCustomerLink	Y
<input type="checkbox"/>	TaxRate	8.25
<input type="checkbox"/>	UseExternalTaxPackage	N

Update List Return to List

To add parameters to a list:

1. Choose the parameters.
 - a. Click **Groups** to choose the group that contains the parameters you want to select.

The list of groups appears. Click the group you want. Click **Refresh**. The parameters for that group appear.
 - b. Choose parameters from the group.

If you want to choose all the parameters in the group, check the Select All box.

If you want to choose only certain parameters, check the box in the Select All column for each parameter that you want. If you do not want a parameter included in the list, click the box again. The check is cleared.
 - c. Click **Update List**.

The parameters are added to the new parameter list. To add parameters from another group, repeat this step to choose the parameters until you have parameters from all the groups that you want.
2. When you have added all the parameters you want, click **Return to List**. The added parameters appear in the Parameters in List on the List Details screen.

Removing Parameters from the List

On the List Details screen, you can remove parameter lists. To remove parameters from the parameter list:

1. If the parameter is not already selected to be removed, check the box in the Select to Remove column.

2. Click **Remove**. All parameters that have a checked box in the Select to Remove column are removed.

Note: If you click **Save** before **Remove**, the parameters are also removed from the list.

Changing a Parameter Value

On the Edit Parameter screen, the value assigned to a parameter in a parameter list can be changed. The value of the parameter is only changed in the selected parameter list. The type of edit screen that is displayed depends on the parameter:

- If the parameter uses a value field, you enter the new value. The minimum and maximum allowed values are displayed on the edit screen. Only new values within this range are accepted.
- If the parameter uses one value chosen from a list of possible values, you select the new value from the list. To select a value, click the value in the New Value menu.
- If the parameter allows more than one value from a list, you select the new values from the menu. To add a value, click the value in the Allowed Values menu and click **Add**. To remove a value, click the value in the Selected Values menu and click **Remove**.
- If the parameter uses a created list, you enter the new values separated by commas.

To choose the new value for the parameter:

1. Click the Parameter List Name that you want to change. The List Details screen is displayed. See [Figure 3-15](#).
2. Click the Parameter Name in the Parameters in List section. The Edit Parameter screen is displayed.

Figure 3-17 Edit Parameter Screen

Edit Parameter

Enter a New Value and press Save. Save

New Store Parameters

Parameter Group: Tax
Parameter Name: TaxRate

Minimum Allowed Value: 0.00
Maximum Allowed Value: 100.00
Value: 8.25
New Value: *

* = Required field

Save

3. Enter or select the new value for the parameter.
4. Click **Save**.

Removing a Parameter List

On the Parameter Lists screen, an existing parameter list can be removed. Multiple lists can be removed at the same time.

To remove a parameter list:

1. Choose the parameter list to be removed on the Parameter Lists screen. If the parameter list is not already selected to be removed, check the box in the Select to Remove column.
2. Click **Remove**. The Confirm Parameter List Removal screen is displayed. A list of the parameter lists you selected to remove is shown.

Figure 3–18 Confirm Parameter List Removal Screen

Confirm Parameter List Removal

Remove these Parameter Lists?

Parameter List Name	Created	By
New Store Parameters	25/07/07 08:33	pos

- If you do not want to remove all the lists shown, click **No**. All the checked boxes are cleared on the Parameter Lists screen.
- If you want to remove the lists, click **Yes**. All the selected parameter lists are removed.

Distributing the Parameter List

The Distributions left navigation link enables you to work with the currently scheduled parameter distribution jobs.

Note: The parameter list that is distributed contains the parameters and their values that existed in the list on the date and time the distribution job was saved. If the data distribution includes any store groups, the stores included in a group are determined when the distribution job actually runs.

Click **Distributions**. The Scheduled Exports screen is displayed. Only parameter distribution jobs that have been scheduled are shown. From this screen, you can set a job to run immediately, remove a job from the schedule, and change the run date and notifications. See [Working with Scheduled Exports](#) for more information.

Transaction Tracker

The Transaction Tracker feature provides enterprise-wide accumulation of transaction, electronic journal, and signature data with the ability to query entries based on business needs and to monitor for potential fraud or training issues, such as deleted items, tenders, and discounts. The use of a centralized corporate database gives retailers the ability to resolve credit disputes quickly, reduce paper storage and handling, and decrease general auditing efforts. Transaction Tracker provides the following benefits:

- Import of transaction, electronic journal, and captured signature data to the corporate database
- Extensive transaction search capabilities including transaction identifiers, tender types, IDs (for example, credit card numbers), sales associate information, and types of data such as a captured signature
- Web services interfaces to provide queried transaction data to other systems
- Support for transaction types including sales, returns, voids, till functions, house accounts, layaways, special orders, and other operations
- Web based views of transaction, electronic journal, customer, and signature data
- Support to export information to PDF, TXT, or RTF format
- Access to customer information and captured signatures is controlled by security role and user ID

For information on each available search, see [Table 4-1](#).

Working with Transactions

Transaction data including any captured signatures and customer information, as well as electronic journal data (POSlog) that shows a step by step log of events, are sent from stores to the corporate database. For more information on how to import the transaction data, see [Importing Data](#) in [Chapter 3](#).

For a transaction, the following data is available:

- Transaction number
Each transaction is identified by a transaction number. By default, a transaction number is composed of the store number + a register number + a transaction sequence number. The transaction number is not unique as the transaction sequence number is reused. When a transaction number is combined with the date and time of the transaction, this creates a unique identifier for a transaction.
- Type of transaction

- Store where the transaction occurred
- Employee who performed the transaction
- Description of items
- Customer information, if captured with the transaction
- Payment information including signatures captured

Results from a search can be exported to PDF, TXT, or RTF format.

The permission to view certain data, such as a credit card account number, is controlled by the security role assigned to a user ID:

- If a user ID is not allowed to view credit card numbers, the field for that data is masked with asterisks on the Transaction Detail and Signature Capture screens.
- If a user ID is not allowed to see a type of detail view, the link to that view does not appear on any view screens.
- If a user ID is not allowed to see certain types of credit cards, any signatures captured with those types of credit cards are not displayed.

Searching for Transactions

Click a left navigation link to choose the type of search. [Table 4–1](#) describes the types of search information which is available for each search.

Table 4–1 *Types of Search Information*

Type	Description
Hierarchy information	<p>Choose to search nodes in the store hierarchy or to search by store number.</p> <p>To search by node, click Use Hierarchy to search. Choose the node in the store hierarchy. A check next to a node name indicates that node is selected for the search. You can click a triangle next to any node name to display the child nodes or to hide the child nodes from view.</p> <p>To search by store number, click Or search by store number. Enter the start and end store numbers.</p>
Information specific to the search	<p>Choose the specific criteria for the search. See the section in this chapter for the criteria available for each search.</p> <p>Some searches allow multiple sets of information to be used. For example, search by item also allows the selection of transaction information.</p>
Results	<p>Choose the maximum number of transactions displayed on a page. If more transactions are found than this number, navigation is provided at the bottom of the results list to allow you to select the next, previous, or a specific page of data.</p>

See [Figure 4–1](#) for an example of a search selection screen.

For each set of search information available, a checkbox allows you to choose if that criteria should be used. When you check a box, more fields appear on the screen. Enter any of the information. If a box is not checked, none of the fields are shown and that information is not used for the search. By default, Hierarchy Information and the information specific to the type of search chosen have the box checked.

Only transactions that meet all of the search criteria are displayed.

Searching by transaction is used here as an example to describe the available functions for searching for transactions and viewing the results.

Click **Transaction**. The Search By Transaction screen is displayed.

Figure 4–1 Search by Transaction Screen

Search > Results > Details

Search By Transaction

Select the checkbox to include that area's information in the search, enter criteria, and press Search.

Search Clear Search

Hierarchy Information

Use Hierarchy to search

Or search by store number:

From Store Number: To Store Number:

Transaction Information

Transaction Number:

Or

Start Sequence Number: End Sequence Number:

From Register Number: To Register Number:

Start Transaction Date: End Transaction date:

Start Time: End Time: Training Mode: On

Transaction Type: Reentry Mode: Off

Both

On

Off

Both

Tender Information

Results

Show per page: *

* = Required field

Search Clear Search

To search for transactions:

1. Check the box to choose any of the information you want to use in the search. Enter the information. If you want to reset all the fields to the default values, click **Clear Search**.

- Click **Search**. The Transaction Search Results screen is displayed. If only one transaction is found that meets the criteria, the Transaction Detail screen is displayed instead.

Viewing the Search Results

The Transaction Search Results screen shows the list of transactions that meet all of the selection criteria. This screen displays the same information for all the searches.

Figure 4–2 Transaction Search Results

Transaction Search Results Search > **Results** > Details

Select the appropriate action button or link to continue. Export Done

Search Results: Showing 1 to 2 of 2 Returned

Select to Export Select All <input type="checkbox"/>	Store Number	Store Name	Register	Transaction Number	Date	Time	Transaction Type
<input type="checkbox"/>	04241	Lakeline Mall	129	042411291011	7/31/07	11:11 PM	Sale
<input type="checkbox"/>	04241	Lakeline Mall	129	042411290070	7/31/07	4:42 PM	Sale

Results 1-2 of 2

Export Done

The following information is shown for each transaction:

- Select to Export. A checked box indicates the transaction information is selected to be exported. Check the Select All box to choose all of the transactions found on the search.
- Store number and name where the transaction occurred
- Register number
- Transaction number
- Date and time when the transaction occurred
- Type of transaction

To return to the Search By screen, Click **Done**.

To view the transaction details, click the transaction number. The Transaction Detail screen is displayed.

Viewing Detailed Information

The Transaction Detail screen is displayed when you click a transaction number on the Transaction Search Results screen or the Data View link.

Figure 4-3 Transaction Detail Screen

Transaction Detail Search > Results > Details

Go to [Journal View](#)
Go to [Signature Capture View](#)

Select the appropriate action button or link to continue. Export Done

Hierarchy

Commerce Hierarchy >> Enterprise >> South >> Texas >> Austin >> 04241-Lakeline Mall >> Register 129

Transaction

Transaction Number: 042411291011 Date: 7/31/07 Time: 11:11 PM
 Type: Sale Employee Name: Guest User Employee ID: 20027
 Training Mode: Off Reentry Mode: Off
 Status: Completed

Items Sold

Style Number/Description	Quantity	Price	Discount	Price Paid	Tax
Onion Jacket Red 4321	1.00	50.95	0.00	50.95	T
Color: Red					
Style: None					
Size: None					

Totals

Subtotal	Discount	Tax	Quantity	Total
50.95	0.00	4.20	1.00	55.15

Tenders Applied

Type	ID	Amount
Visa	4111111111111111	55.15

Export Done

The following hierarchy and transaction information is shown for all types of transactions:

- Path in the store hierarchy where the transaction occurred
- Transaction number
- Date and time the transaction occurred
- Type of transaction
- Name and ID of the employee who performed the transaction
- Indicator if training mode was in effect at the Oracle Retail Point-of-Service register when the transaction occurred
- Indicator if the transaction was entered when reentry mode was in effect at the Oracle Retail Point-of-Service register

- Status of the transaction

Additional information displayed is dependent on the type of transaction. For example, for a sale transaction, the items sold, totals, and tenders applied are shown.

At the top left of each detail screen, links are provided to view other information that is available. You can click **Data View** (transaction details), **Journal View**, **Signature Capture View**, and **Customer Information View**. Click a link and the data is displayed. If the data is not available or you are not allowed to see that detail view, the link is not displayed.

Value Added Tax Value added tax (VAT) is a tax added at various stages of production based on the value added to the product at that stage.

For transactions that occurred at a store with VAT enabled, the Tax column is not shown in the Totals section. Instead, the Tax Summary section is added at the bottom of the screen. This section contains information on the VAT applied to the transaction. The following figure shows an example of this section.

Figure 4–4 Tax Summary Section of the Transaction Detail Screen

Tax Summary			
VAT Rate/Code	Excluding Tax	Tax	Including Tax
5% R	9.52	0.48	10.00
0% Z	10.00	0.00	10.00
17.5% S	8.51	1.49	10.00
Total	28.03	1.97	30.00

Table 4–2 describes the columns shown in this section of the Transaction Detail screen.

Table 4–2 Tax Summary Columns

Column	Description
VAT Rate/Code	The percentage rate and the code for each VAT.
Excluding Tax	Total amount of items to which this VAT was applied. A total of all the amounts is shown at the bottom of this column.
Tax	Total amount of VAT applied at this rate. A total of all the VAT applied is shown at the bottom of this column.
Including Tax	Total amount of items plus the total amount of VAT applied. A total of the amounts is shown at the bottom of this column.

Viewing Journal Information

The journal is an audit log of the operator and system events that occurred for the transaction in the order in which they occurred. The information and events that are displayed depend on how the journal entry is defined by the retailer.

Note: The information on this screen is displayed in the default locale of the store where the transaction occurred.

Click **Journal View**. The Journal View screen is displayed.

Figure 4-5 Journal View Screen

Journal View Search > Results > Details

Go to [Data View](#)
 Go to [Signature Capture View](#)

Select the appropriate action button or link to continue. Export Done

Transaction Journal

7/31/07		11:10 PM
Trans.: 1011		Store: 04241
Reg.: 129		Till: 148
Cashier: 20027		Sales: 20027
ITEM: 4321	50.95	T
Onion Jacket Red		
Qty: 1 @ 50.95		
Total Discount		0.00
Subtotal		50.95
Tax		4.20
Total		55.15
Credit Tendered		55.15
Type: Visa		
Acct. #: 1111		
Expiration Date: 02/2019		
Entry: Manual		
Auth. Status: Pending		
Credit Authorized		55.15
Type: Visa		
Acct. #: 1111		
Expiration Date: 02/2019		
Entry: Manual		
Auth. Status: Approved		
Auth. Code: VERI 54323		
Auth. Response: VERI 54323		
Auth. Method: Automatic		
Auth. Amt: 55.15		
Network: Online		
Total Tender		55.15
Change Due		0.00
7/31/07		11:10 PM

Export Done

Viewing Signature Capture Information

This view is only available if signature data was captured for the transaction. Click **Signature Capture**. The Signature Capture View screen is displayed.

Figure 4–6 Signature Capture View Screen

Signature Capture View Search > Results > Details

Go to [Data View](#)
Go to [Journal View](#)

Select the appropriate action button or link to continue. Export Done

Hierarchy

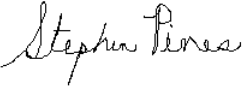
Commerce Hierarchy >> Enterprise >> South >> Texas >> Austin >> 04241-Lakeline Mall >> Register 129

Transaction

Transaction Number: 042411291011	Date: 7/31/07	Time: 11:11 PM
Type: Sale	Employee Name: Guest User	Employee ID: 20027

Signature Capture(s)

Type	ID	Amount
Visa	4111111111111111 Expires 02/2019 Auth: VERI 54323 (A)	55.15



Export Done

Table 4–3 describes the information shown on this screen.

Table 4–3 Signature Capture View Sections

Section	Description
Hierarchy	Path in the store hierarchy where the transaction occurred
Transaction	<ul style="list-style-type: none"> ■ Transaction number ■ Date and time the transaction occurred ■ Type of transaction ■ Name and ID of the employee who performed the transaction
Signature Capture(s)	<ul style="list-style-type: none"> ■ Type of credit card ■ Identifier of the credit card and authorization code ■ Amount charged to this credit card ■ Captured signature for this credit card

Viewing Customer Information

This view is only available if customer information is attached to the transaction. Customer information is not captured through a credit or debit card, but is specifically attached and maintained in customer tables. This data is part of the POSLog.

Click **Customer Information**. The Customer Information screen is displayed.

Figure 4-7 Customer Information Screen

Customer Information Search > Results > Details

Go to [Data View](#)
 Go to [Journal View](#)
 Go to [Signature Capture View](#)

Export Done

Select the appropriate action button or link to continue.

Customer

Customer ID: 12345	Customer Type: Individual
First Name: Stephen	Salutation: Mr.
MI:	Suffix:
Last Name: Pines	Gender: M
Address Line 1: 88 Point St	Birthday:
Address Line 2:	Allow Mail: Yes
City: Austin	Allow Telephone: Yes
State/Province: TX	Allow Email: No
Country: USA	Preferred Customer Discount: Silver
Postal Code: 78777	Employee ID: pos
Preferred Language:	

Telephone Number	type
(512) 555-2776	Home
(512) 555-2657	Work

Export Done

The following information is shown in this screen:

- Customer ID and type
- Name, including any salutation or suffix, address
- Address and telephone number
- Preferred language

The only language currently supported for the preferred language is English (United States).

- Birthday
- Indicators if mail, telephone, or email is allowed
- Preferred customer discount
- Employee ID, if the customer is an employee

Exporting the Search Results

From the Transaction Search Results screen or any of the detail screens, the results can be exported in order to be viewed in a supported output format. You choose the output format and view the results using an application intended for that format. The application reformats the data, if needed, before it is displayed. The available formats are PDF, TXT, and RTF. The results can only be viewed in the chosen output format if the application required to view that format is available.

Note: To export signatures for credit dispute research, PDF should be used. Other formats do not render the signature as a drawing.

To export the search results you are viewing:

1. Click **Export**. The Export screen is displayed.
2. Enter the file name and select the output format.
3. Click **Save**. The application that is required for the selected output format is started. The results are displayed using that application.

Type of Searches

Click the left navigation link for the search you want.

Note: Since transaction IDs are a combination of store number, register number, and sequence number, in order to search by a range of transaction numbers, you must enter all of the following information:

- A store hierarchy or store number range
 - Start and end sequence numbers
 - Start and end register numbers
 - Start and end transaction dates
-
-

Searching by Item

This search is used to find transactions based on item criteria.

The following item information can be chosen:

- Serial number
- Item number
- Style
- UPC
- Price Override Applied — a manual price override was entered
- Item Cleared — item was rung up and then cleared from the transaction

Transaction information can also be chosen.

Searching by Transaction

This search is used to find transactions based on transaction and tender criteria.

The following transaction information can be chosen:

- Transaction number
- Start and end sequence numbers
- Start and end register numbers
- Start and end transaction dates
- Start and end transaction times
- Transaction type
- Training mode — if an employee was being trained when a transaction occurred
- Reentry mode — if transactions were manually entered from paper, for example, when recovering from a power outage

The following tender information can be chosen:

- Tender type
- Tender ID — identification number associated with the tender, for example, credit card number
- Minimum and maximum tender amount

Searching by Sales Associate

This search is used to find transactions based on sales associate criteria.

The following sales associate information can be chosen:

- Sales associate employee ID
- Cashier number

Transaction and item information can also be chosen.

Searching by Customer

This search is used to find transactions based on customer criteria.

The following customer information can be chosen:

- Customer ID
- First and last name
- Address
- Telephone number

Transaction information can also be chosen.

Searching by Signatures Captured

This search is used to find transactions based on signature capture data. Only transactions with signatures captured for a tender used for a retail transaction are found by this search.

The following signatures captured information can be chosen:

- Transaction number
- Transaction date
- Tender amount
- Transaction amount
- Tender type
- Tender account number

Searching by Electronic Journals

This search is used to find transactions based on minimal transaction criteria. It searches through the minimal key data that has been captured with the electronic journal at the Oracle Retail Point-of-Service application and imported to the corporate database.

The following electronic journal information can be chosen:

- Transaction number
- Start and end sequence numbers
- Start and end register numbers
- Start and end transaction dates and times

The Admin feature provides the administrative functions to manage user security and operations data for the enterprise. Admin provides the following benefits:

- Creation and management of store groups for data distributions
- Assignment of a hierarchy level to each user ID to control that user's access for transaction searches and data distributions
- Definition of security roles and assignment of a specific role to each user ID
- Management of all types of scheduled jobs
- Maintenance of individual parameters for consistent implementation of Oracle Retail Central Office policies
- Creation and management of user tasks

For information on each available function, see the following sections:

- [Store Directory](#)
- [Users](#)
- [Roles](#)
- [Job Manager](#)
- [Parameter Maintenance](#)
- [Tasks](#)

Store Directory

The store directory, or store hierarchy, defines where stores fit in the retailer's enterprise. The hierarchy levels can be ordered in a way that makes the most sense for reporting, security, or data distribution purposes. For example, stores may be arranged by regions of the country and then the states within each region. Any number of hierarchy levels can exist, stores can exist at any level of the hierarchy, and one level of the hierarchy can contain both stores and lower levels, allowing flexibility in hierarchy definition.

The store hierarchy is defined in an XML file. Whenever any changes are made to the store hierarchy, the XML file is edited, and that file is then imported to Oracle Retail Central Office.

Note: A store hierarchy level is assigned to each user ID. The import replaces the existing store hierarchy. If any users IDs were assigned to hierarchy levels now removed, those user IDs need to be reassigned to a different hierarchy level through the Users subtab.

Individual stores can be chosen from any part of the store hierarchy and defined as a store group. Store groups are used for data distributions. For example, all the stores that are in malls could be placed in one group and then that group can be used for distributing data specific to mall stores.

Click **Store Directory** to work with store groups.

Working with Store Groups

The Store Groups screen shows the list of defined store groups. A store group is an ad hoc list of stores for use in data distributions. For example, a group may be defined for mall stores and another group for stand-alone stores. Stores within one group do not have to be on the same arm of the store hierarchy. There is no limit to the number of groups in which a store can be included.

To work with store groups, click **Store Groups**. The Store Groups screen is displayed.

Figure 5–1 Store Groups Screen

Store Groups

Select a group to edit, or press Add Group to define a new store group.

Select to Remove	Store Group Name	Number of Entries
<input type="checkbox"/>	Texas Store Group	2
<input type="checkbox"/>	Mall Stores	1

[Table 5–1](#) describes the information shown for each store group.

Table 5–1 Store Groups Column

Column	Description
Select to Remove	A checked box indicates the group is selected to be removed
Store Group Name	Name of the group
Number of Entries	Number of stores in the group

To change an existing store group or add a new group, click Add. See [Adding or Changing a Store Group](#). To remove a store group, see [Removing a Store Group](#).

Adding or Changing a Store Group

On the Define Group screen, you can define a new group or change an existing group.

Figure 5–2 Define Group Screen

Define Group

Enter the store group definition and select Save.

Store Group Information

Group Name: *

Group Description: *

Enter store(s) separated by commas, and press Add to add to the list.

Last Modified: 7/18/07 11:22 AM

Stores in Group

Select to Remove	Store Number	Store Name
<input type="checkbox"/>	04241	Lakeline Mall
<input type="checkbox"/>	01291	Cactus Shopping Emporium

* = Required field

To set the group definition:

1. Enter the group name.
2. Enter the group description.
3. Choose the stores for the group.

To add a store to the list, enter the store number from the store hierarchy. Click **Add**. The store is added to the Stores in Group list. Multiple stores can be added at the same time.

To remove a store already in the list, check the box in the Select to Remove column. Click **Remove**. The store is removed from the group. More than one store can be removed at same time.

4. Click **Save**. The group definition is saved.

Removing a Store Group

On the Store Groups screen, you can remove store groups. To remove a store group:

1. On the Store Groups screen, check the box in the Remove column for the group you want to remove.
2. Click **Remove**. The group is removed. More than one group can be removed at a time.

Users

On the User Administration screen, you can search for users and add new users. Click the **User** tab. The User Administration screen is displayed.

Figure 5–3 User Administration Screen

User Administration

Enter either a user id or characters of the first and last name to search. Leaving the fields blank will return all current users. Press Add to add a new user.

Search for Users

User ID:

--OR--

First Name:

Last Name:

To search for user IDs:

1. Enter a user ID or name.

Note: The criteria entered for the search is case sensitive.

- If you want to search for a specific user ID, enter the entire user ID.
- If you want to search by name, enter a full name or some of the characters in the name. All the user IDs that have those characters in the name are found.
- To see all the user IDs, leave all the fields blank.

If you want to clear the entered criteria, click **Reset**.

2. Click **Search**. The User Search Results screen is displayed. See [Viewing User Search Results](#).

If only one user ID is found, the User Details screen is displayed instead. See [Adding or Changing a User ID](#).

Viewing User Search Results

When more than one user is found when searching for users, the User Search Results screen shows all the users found who match the search criteria.

Figure 5–4 User Search Results Screen

User Search Results

Select a User ID to continue Remove

Search criteria

First Name: _____

Last Name: **Ja**

Search results: Showing 2 of 2

Select to Remove	Last Name	First Name	Middle Name	User ID	Status
<input type="checkbox"/>	Jacobs	Michael	Steven	mjacobs	Active
<input type="checkbox"/>	Jacobson	David	Matthew	djacobson	Active

Remove

For each user, the following information is displayed:

- A checked box in the Select to Remove column indicates the user is to be removed
- First, middle, and last name of the user
- User ID
- Status of the user

To view the user details, click the user ID. The User Details screen is displayed. See [Figure 5–5](#).

To remove a user ID, see [Removing a User ID](#).

Adding or Changing a User ID

On the User Details screen, you can add a new user ID or change an existing user ID. For information on changing a user ID, see [Changing a User ID](#).

Figure 5–5 User Details Screen

The screenshot shows the 'User Details' screen with the following sections:

- User Info:**
 - First Name: William *
 - Middle Name: (empty)
 - Last Name: Roberts *
 - User ID: billr *
 - Status: Inactive (selected from a dropdown menu)
- Role Assignments:**
 - User has right of: Full Access (selected from a dropdown menu)
 - Other options: No Access, Administrator, Power User, Minimal, Accountant
- Hierarchy Assignment:**
 - Operator can access data for hierarchy node:*
 - Commerce Hierarchy (checked)
 - Enterprise
 - North
 - South
 - Texas
 - Austin
 - Dallas

* = Required field

To add a new user ID:

1. Enter the name of the user and user ID. Select the status of the user ID.

Note: A user must have a status of Active in order to log in to Oracle Retail Central Office.

2. Choose the role you want assigned to the user ID. See [Roles](#) for more information.
3. Set the hierarchy assignment.

The hierarchy assignment determines the hierarchy node the user can specify for searches through Transaction Tracker and for data and parameter distributions.

Click the node name in the store hierarchy. A check next to a node name indicates that node is selected. You can click a triangle next to any node name to display the child nodes or to hide the child nodes from view.

4. Click **Save**. The user ID is added. The temporary password is displayed. It should be written down and given to the user. This is the only time the password will be displayed.

An Employee ID is assigned to the new user. The Employee ID is displayed on the User Details screen after the user has been added.

Changing a User ID

To change a user ID:

1. On the User Search Results screen, click the user ID. The User Details screen is displayed. See [Figure 5-5](#).
2. Change the user name, user ID, or hierarchy assignment.
3. Change the status or role assignment. The Confirm Status Change dialog is displayed.
 - To confirm the change, click **Yes**.
 - To not change the status or role assignment, click **No**.
4. To change the password, click **Reset Password**. The Reset Password dialog is displayed.
 - To confirm the password reset, click **Yes**. The temporary password is displayed. It should be written down and given to the user. This is the only time the password will be displayed.
 - To not reset the password, click **No**.
5. Click **Save**. The changes are saved.

Removing a User ID

To remove a user ID:

1. On the User Search Results screen, check the box in the Select to Remove column for the user ID you want to remove.
2. Click **Remove**. The user ID is removed. Multiple user IDs can be removed at the same time.

Roles

To reduce the administrative time required to set up security for users, a role can be defined for each security level and the functions that role may and may not access can be specified. Each user ID is then assigned to one role and has access to all functions allowed for that role. Different roles may have identical function accessibility.

If a role is changed, any user IDs assigned to that role are not affected until the next time the user logs in.

Note: There is a lag time on some application servers for the security changes to become visible. Consult your system administrator if you do not see the changes take effect immediately.

Click **Roles**. The Roles screen is displayed.

Figure 5–6 Roles Screen

Roles

Select to work with a security role. Add Remove

Select to Remove	Role
<input type="checkbox"/>	Accountant
<input type="checkbox"/>	Administrator
<input type="checkbox"/>	AmericanExpress Users
<input type="checkbox"/>	Customer Service
<input type="checkbox"/>	DiscoverCard Users
<input type="checkbox"/>	Full Access
<input type="checkbox"/>	Loss Prevention
<input type="checkbox"/>	Manager
<input type="checkbox"/>	MasterCard Users
<input type="checkbox"/>	Minimal
<input type="checkbox"/>	No Access
<input type="checkbox"/>	Power User
<input checked="" type="checkbox"/>	Reports Only
<input type="checkbox"/>	Store Support
<input type="checkbox"/>	Visa User

Add Remove

For each role, the following information is displayed:

- A checked box in the Select to Remove column indicates the role is to be removed. See [Removing a Role](#).
- Name of the role

To view or change the settings for a role, click the name in the Role column. See [Selecting the Role Settings](#).

To add a new role, click Add. See [Adding a New Role](#).

Selecting the Role Settings

The Role Settings screen enables you to define the allowed access for a role.

Figure 5–7 Role Settings Screen

Role Settings for District Manager

Select All to grant access to all features, or select specific features for access and press Save. Select an Application and Module to work with a subset of the features. Save

Select All <input type="checkbox"/>	Application	Module	Feature
<input checked="" type="checkbox"/>	Central Office	Parameter Maintenance	dist
<input checked="" type="checkbox"/>	Central Office	Parameter Maintenance	dist_edit
<input type="checkbox"/>	Central Office	Parameter Maintenance	dist_remove
<input checked="" type="checkbox"/>	Central Office	Parameter Maintenance	dist_runimm
<input checked="" type="checkbox"/>	Central Office	Parameter Maintenance	paramlist
<input type="checkbox"/>	Central Office	Parameter Maintenance	paramlist_add
<input checked="" type="checkbox"/>	Central Office	Parameter Maintenance	paramlist_distribute
<input type="checkbox"/>	Central Office	Parameter Maintenance	paramlist_remove
<input checked="" type="checkbox"/>	Central Office	Parameter Maintenance	paramlist_update

Save

Table 5–2 describes the information shown for each feature.

Table 5–2 Role Settings Column

Column	Description
Select All	A checked box indicates that this role is granted access to the feature. If the box is not checked, access to the feature is denied and a user ID assigned this role will not be able to use that feature.
Application	Available applications from which the functions can be selected.
Module	Sets of functions available for an application. For the Oracle Retail Central Office, this corresponds to the available subtabs.
Feature	Features available for the selected application and module. For the Oracle Retail Central Office, this corresponds to the left navigation links and action buttons available for each subtab. In some cases, additional fields can be secured such as the viewing of credit card numbers.

To choose the role settings:

1. Choose the features that can be accessed:
 - a. Click **Application**. Click the application whose features you want to choose.
 - b. Click **Module**. Click the module whose features you want to choose. The features available for that function are shown.

To grant access to all the features, check the Select All box. To grant access to a specific feature, check the box in the Select All column.

To deny access to a feature already selected, click the box in the Select All column. The check is cleared from the box.

2. When you have made choices for all the applications and modules that you want, click **Save**. The existing role is changed or the new role is added.

Adding a New Role

The Role Name screen is used to define the name for a new role. To add a new role, click **Add** on the Roles screen.

Figure 5–8 Role Name Screen

Role Name

Enter a Role Name and press Next.

Role Name: *

* = Required Field

Next

Enter the name for the role. click **Next**. The Role Settings screen is displayed. See [Selecting the Role Settings](#).

Removing a Role

To remove a role:

1. On the Roles screen, check the box in the Select to Remove column for the role you want to remove.
2. Click **Remove**. The Confirm Role(s) Removal screen is displayed.
 - If you want to remove all the selected groups, click **Yes**. The roles are removed.
 - If you do not want to remove all the selected groups, click **No**. The role is not removed and the Select to Remove box remains selected.

Job Manager

The Job Manager function provides the capability to work with scheduled jobs. The types of scheduled jobs are parameter distributions, file transfers, and data imports.

To work with scheduled jobs, click **Job Manager**. The All Scheduled Jobs screen is displayed.

Figure 5–9 All Scheduled Jobs Screen

All Scheduled Jobs

Select the appropriate link or action button to continue. Run Immediately Remove

Search Results: Showing 1 to 4 of 4 Returned

Show jobs of type: All Refresh

Select to Run Immediately or Remove	Description	Scheduled Run	Recipient	Action Date	Job Status
<u>Review weekend schedule</u>					
<input type="checkbox"/>	Schedule : Custom: One Time Notifications : pos Required Approval:			July 18, 2007 7/18/07 12:28 PM	Not Started
<u>Update contracts</u>					
<input type="checkbox"/>	Schedule : Custom: One Time Notifications : pos Required Approval:			July 18, 2007 7/18/07 12:29 PM	In Progress
<u>Office Assignments</u>					
<input type="checkbox"/>	Schedule : Custom: One Time Notifications : pos Required Approval:			July 18, 2007 7/18/07 12:41 PM	Complete
<u>Internal: Pricing change start task - EventID:101</u>					
<input type="checkbox"/>	Schedule : Custom: One Time Notifications : Required Approval:			July 18, 2007 7/18/07 8:19 AM	Submitted

Results 1-4 of 4

Run Immediately Remove

For a description of each column, see [Table 3–3](#).

To choose the jobs to be displayed:

1. Click **Show jobs of type**. Choose to display all jobs or just a certain type of job.
2. Click **Refresh**. The type of jobs selected are displayed.

The functions available on this screen are the same as the Scheduled Imports screen. See [Working with Scheduled Imports](#) in [Chapter 3](#) for more information.

Parameter Maintenance

A parameter is a value that sets an individual characteristic. For example, a parameter called AcceptedTenderIssuers could list all the tenders that are accepted for payment.

A parameter group is a set of parameters that are grouped together by category. This makes it easier to find a specific parameter. A parameter is part of only one parameter group. For example, a group called Discount could contain all the parameters used for applying discounts. If you needed to change a parameter relating to discounts, you could easily find the parameter.

A parameter list is a set of parameters bundled together for distribution to stores. For information on working with parameter lists and distributing parameter lists, see [Parameter Maintenance in Chapter 3](#).

Note: For more information on specific parameters, see Oracle Retail Strategic Store Solutions Configuration Guide.

Click **Parameter Maintenance**. The Select Parameters screen is displayed.

Selecting Parameters

The Select Parameters screen displays all the available parameters in the selected parameter group.

Figure 5–10 Select Parameters Screen

Select Parameters

Select a group to view its parameters and their values.

Groups:

Parameter Name	Value
AcceptedTenderIssuers	AmEx , American Express , Discover , MasterCard , Visa , House Card , House Card2 , House Card3 , Diners Club , JCB
AcceptedTenderTypes	Cash , Check , Coupon , Credit , Debit , E-Check , GiftCard , GiftCert , MailCheck , MailCert , MoneyOrder , PurchaseOrder , StoreCredit , TravelCheck
BypassTaskAndWorkflowOnImport	Y
DefaultHierarchyToTopLevel	Y
MaximumSearchResults	9999
NonEditableGroups	Administrator
SecurityRoleForAmEx	AmericanExpress
SecurityRoleForAmerican Express	AmericanExpress
SecurityRoleForDiners	DinersClub
SecurityRoleForDiners Club	DinersClub
SecurityRoleForDiscover	Discover
SecurityRoleForHouse Card	HouseAccount1
SecurityRoleForHouse Card2	HouseAccount2
SecurityRoleForHouse Card3	HouseAccount3
SecurityRoleForHouseCard	HouseAccount1
SecurityRoleForJCB	JCB
SecurityRoleForMasterCard	MasterCard
SecurityRoleForVisa	Visa
SignatureFormat	image/svg+xml
StartOfWeek	Sunday

The following information is displayed:

- Name of the group
- Parameters in the group
- Value currently assigned to each parameter

To choose a different group of parameters:

1. Click **Groups**. The list of the available groups is displayed.
2. Click the group.
3. Click **Refresh**. The parameters in that group are displayed.
4. To edit a parameter value, see [Editing a Parameter](#).

Editing a Parameter

The Edit Parameter screen is used to change the value of a parameter. The type of edit screen displayed depends on the parameter:

- If the parameter uses a value field, enter the new value. The minimum and maximum allowed values are displayed on the edit screen.
- If the parameter uses one value chosen from a list of possible values, select the new value from the list.
- If the parameter allows more than one value from a list, select a value from the list and click **Add**. Repeat this for each value you want to choose.
- If the parameter uses a created list, enter the new values separated by commas.

To change the value assigned to a parameter:

1. On the Select Parameters screen, click the name in the Parameter Name column. The Edit Parameter screen is displayed.

Figure 5–11 Edit Parameter Screen

Edit Parameter

Select a value from the Available Values to add to the Selected Values, or remove a value from the Selected Values.

Note: New Values show the default values.

Application Parameters

Parameter Group: CentralOffice
Parameter Name: AcceptedTenderIssuers

Available Values:		Selected Values;
<div style="border: 1px solid #ccc; padding: 5px;"> AmEx JCB Diners Club House Card3 House Card2 House Card Visa MasterCard Discover American Express </div>	<input type="button" value=">>>Add>>>"/>	<div style="border: 1px solid #ccc; padding: 5px;"> AmEx American Express Discover MasterCard Visa House Card House Card2 House Card3 Diners Club JCB </div> <div style="text-align: right; margin-top: 10px;"> <input type="button" value="Remove"/> </div>

2. Enter or select the new value for the parameter.
 In this example, to add a value for the parameter, click the value in the Available Values list and click **Add**. To remove a value, click the value in the Selected Values list and click **Remove**.
3. When you have made all your changes, click **Done**. The parameter value is changed.

Tasks

Current tasks, and the status of each task, are displayed in this list. The newest tasks are shown at the top of the list.

Figure 5–12 Tasks Screen

Tasks

Select the browser's refresh button to see the latest tasks.

Select to Remove	Type	Description	Date	Status
<input type="checkbox"/>	Review	Parameter Distribution: New store parameter update	7/30/07 8:09 AM	Needs Approval
<input type="checkbox"/>	Job	Parameter Distribution: New store parameter update	7/30/07 8:09 AM	Needs Approval
<input type="checkbox"/>	Job	TODO: Check start time	7/25/07 12:05 PM	Not Started
<input type="checkbox"/>	Job	TODO: Lunch with Management	7/25/07 11:59 AM	Complete
<input type="checkbox"/>	Job	TODO: Test	7/25/07 11:43 AM	Complete
<input type="checkbox"/>	Job	TODO: Office Assignments	7/18/07 12:41 PM	Complete
<input type="checkbox"/>	Job	TODO: Update contracts	7/18/07 12:29 PM	In Progress

Table 5–3 lists the information shown for each task in the list.

Table 5–3 Tasks Column

Column	Description
Select to Remove	A checked box indicates the task may be removed. A box is displayed only if you are allowed to remove the task.
Type	Alert indicates the status has changed for a To Do task that you created. Job indicates either a notification from Oracle Retail Central Office about a job or a To Do task that was assigned to you. Review indicates that you need to approve the data distribution job.
Description	Brief description of the task
Date	The date and time is determined by the status of the task
Status	See Table 5–4 for a description of the possible statuses

Working with To Do Tasks

An easy way to keep track of tasks that you or another user need to get done is to create a To Do task. You can then track the progress on the task through the Tasks list. To create a To Do task, you provide the description, category, due date for completion, and list of assignees to complete the task. See [Adding or Changing a Task](#) for details on creating a To Do task.

When you assign a To Do task to a user, a task is displayed in the assignee's Tasks list. A To Do task is not removed from an assignee's list until the status is Complete. The task cannot be removed by an assignee, but that user can choose other assignees for the task. That user is then the creator of the additional To Do tasks and can then track the progress.

For a To Do task assigned to you, you can edit the details about the task. The information you change is only retained in the copy in your Tasks list. Whenever you change the status of a To Do task, an alert task is displayed in the Tasks list of the user who created the task. See [Adding or Changing a Task](#) for more information. [Table 5-4](#) describes the possible statuses.

Table 5-4 Possible Task Status

Status	Description	Date and Time
Approval Expired	All required approvals were not collected by the date and time needed	When the approval expired
Created	Job was created	When the job was created
Denied	Approval for the job was denied	When the job approval was denied
Executing	Job is currently executing	When the job started executing
Failed	Job failed and requires attention	When the job failure occurred
Needs Approval	Approval is required before the job runs	When the approval is needed
Submitted	Job has been submitted for scheduling	When the job was submitted for scheduling
Succeeded	Job completed successfully	When the job completed successfully
The following statuses are only used for To Do type tasks:		
Complete	Task has been completed by the assignee	When the task was marked Complete
Deferred	Task has been deferred by the assignee	When the task was marked Deferred
In Progress	Assignee is working on the task	When the task was marked In Progress
Not Started	Task has been created	When the task is due to be completed
The following status is only used for Review type tasks:		
Needs Approval	Your approval is required for a data distribution job	When the approval is needed

Viewing the Task Details

Additional information about each task in the list is displayed.

On the Tasks screen, click the Description for the task details you want to see. The screen that is displayed depends on the task type. [Table 5-5](#) lists the section that describes the screen for each task type.

Table 5-5 Task Details Screen Displayed for Each Task Type

Task Type	Task Details
Alert	See Viewing Details for a To Do Task . The fields contain the current information for the To Do task.
Job	See Viewing Details for a Task Type of Job .
Review	See Handling the Needs Approval Status .

Viewing Details for a To Do Task

The Task Details screen shows detailed information about the task.

Figure 5-13 Task Details Screen for a To Do Task

Task Details

Update task information and press Save. Save

To Do

Description:

Details:

Perform end of month contract updates for temporary workers

Current Status: In Progress ▼

Category: Reminder

Due Date: 7/31/07 1:00 PM

Save

For a detailed description of each field, see [Table 5-8](#).

Viewing Details for a Task Type of Job

The Scheduled Job Summary screen shows detailed information about the task.

Figure 5–14 Task Details Screen for a Job Task Type

Scheduled Job Summary

Select Done when finished viewing or editing. Done

Information

Task Name: File Transfer
 Job Name: PRICING_CHANGE_PERMANENT
 Job Description: Internal: Pricing change start task - EventID: 101
 Schedule:
 Recipients:
 Notifications: N/A

History

Date

Acknowledgements

Destination ID	Status	Status Date

Done

Table 5–6 describes the information shown in the Scheduled Job Summary screen.

Table 5–6 Scheduled Job Summary Details

Detail	Description
Information	Type of task performed. Name and description of the job. If the job is scheduled on a repeating basis, the next scheduled runtime is shown. Recipients of the data distribution or file transfer. Type of notification and the user IDs that receive notification of the job's progress.
History	Log of the status changes that occurred and the data and time of each change.
Acknowledgements	For a data distribution job, Oracle Retail Central Office can receive an acknowledgement back from each store that the data distribution was received. The acknowledgement includes a text field that can be completed by the store with any type of status information applicable to the job. The store ID number, status, and the date and time the status occurred are shown on this screen. Acknowledgements are only available for data distribution jobs.

Handling the Needs Approval Status

A task type of Review and a status of Needs Approval means that your approval, and possibly others, is needed to allow a data distribution job to run. To approve or deny the distribution, click the **Needs Approval** link in the Status column. The Approve by Job screen is displayed.

Figure 5–15 Approve by Job Screen

Approve by Job

Enter comments or select to receive dashboard notifications, and press Approve or Deny. Approve Deny

Job Summary

Job: Parameter Distribution **Job Name:** New store parameter update
Recipient: Export:Lakeline Mall **Approval Deadline:** 8/6/07 8:09 AM
Approval Routing: Simultaneous **Approval Type:** Whole Job
Job Schedule to Run: Custom: One Time **Date Effective:** 7/30/07 8:09 AM

Job Data

New Store Parameters

Name: **Description:**

Last Modified: 7/30/07 8:09 AM by pos

Group	Parameter Name	Value
Base	TimeoutInactiveWithoutTransaction	-1
Base	TimeoutInactiveWithTransaction	-1
Base	TrainingModeOpenDrawer	N

Approvals

Approvals Captured:

Operator	Process Date	Result	Comments
	7/30/07 8:24 AM		

Comments

Notifications

I'd like to receive dashboard notification of further status changes for this data distribution.

Approve Deny

Table 5–7 describes the information shown for the job.

Table 5–7 Approve by Job Information

Detail	Description
Job Summary	Type and name of the job. Intended recipient of the data distribution. Date and time when all approvals for the job must be captured in order to allow the data distribution to occur. Approval routing which is to all reviewers at the same time. Approval type which is to approve or deny all the parameter updates. If the job is scheduled on a repeating basis, the next scheduled runtime is shown. If the job is scheduled to run immediately, the date and time the job was submitted is shown. Date and time that the data update should take effect on the receiving system.
Job Data	Parameter list name. Date and time when the list was last modified. The parameter group, parameter name, and chosen value for each parameter in the list.
Approvals	Approvals that have already been captured: <ul style="list-style-type: none"> ■ First and last name of the reviewer ■ Date and time the job was approved or denied ■ Whether the job was approved or denied by that reviewer ■ Comments from the reviewer
Comments	Any comments you want to include regarding your approval or denial.
Notifications	A checked box means you want to receive notification, in your Tasks list, of status changes for the job.

To approve or deny the data distribution job:

1. Enter reviewer comments.
2. If you want to receive additional notices in your Tasks lists concerning the progress of the job, click **Notifications** at the bottom of the screen.
3. Approve or deny the job distribution:
 - To allow the distribution, click **Approve**. When all needed approvals have been done, the status is changed to Submitted.
 - To prevent the distribution, click **Deny**. The status for the task is changed to Denied. The job will not start.

Adding or Changing a Task

On the Tasks screen, you can add a new task or change an existing task:

- To add a task, click **Add**. The Task Details screen is displayed.
- To change an existing task, click the description of the To Do task that you want to update. The Task Details screen is displayed with the current information about the task filled in.

Figure 5–16 Task Details Screen

Task Details

Update task information and press Save. Save

To Do

Description: *

Details: *

Review the weekend schedule for the inventory check

Current Status: ▾

Category: ▾

Due Date: *

Due Time: ▾

Assignees

Possible Assignees:

Steve Linds
 Don Linc
 Mark Linds
 Mark Lopes
 Joe Lory
 Chris Low
 Scott Makay
 Michael Man

Assignees: *

Michael Steven Jac

* = Required field Save

Table 5–8 describes the information shown for the task.

Table 5–8 Task Details Information

Detail	Description
To Do	<p>Description of the task to be displayed in the Tasks list.</p> <p>Detailed description of the task.</p> <p>Current status of the task. For the list of possible statuses, see Table 5–4.</p> <p>Category of the task. The possible categories are Issue, Reminder, and Suggestion.</p> <p>The due date and time is dependent on the status assigned to the task.</p>
Assignees	<p>List of possible users that can be assigned to the task.</p> <p>List of users assigned to the task.</p>

To set the task details:

1. Enter the description for the task:
 - a. Enter the description. This description is displayed in the Tasks list.
 - b. Enter the details. This is more detailed information about the task.
2. Set the current status:

The default is Not Started.

 - a. Click **Current Status**. The list of possible statuses is displayed.
 - b. Click the status you want to use.
3. Set the category.

The default is Issue.

 - a. Click **Category**. The list of possible categories is displayed.
 - b. Click the category you want to use.
4. Set the due date and time.

These fields default to the current date and time.

 - a. Enter the date into the field or click the calendar button to bring up a calendar. You can search through the calendar and select the date that you want.
 - b. Enter the time between 00:00 and 23:59.
5. Set the list of assignees for the task. You must assign at least one user to the task.
 - To add an assignee, click the name in the list of Possible Assignees that you want to add. You can select multiple names at the same time. Click **Add**.
 - To remove an assignee, click the name in the list of Assignees that you want to remove. You can select multiple names at the same time. Click **Remove**.
6. To save the task details, click **Save**. If you changed the status of an existing task, an alert task is set to the Tasks list of the user that assigned the To Do to you.

Printing the Task List

To print the list of tasks shown on the Tasks screen, click **Print**. Printing is handled by the web browser you are using.

Removing a Task

Only tasks that have a box displayed in the Select to Remove column on the Tasks screen can be removed.

To remove a task:

1. If the task is not already selected to be removed, check the box in the Select to Remove column.
2. Click **Remove**. All the tasks that have a checked box in the Select to Remove column are removed at the same time.