# Oracle® Site Hub

User's Guide

Release 12.2

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Oracle Site Hub User's Guide, Release 12.2

Part No. E48911-08



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- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
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# Preface

## Intended Audience

Welcome to Release 12.2 of the *Oracle Site Hub User's Guide.*

See Related Information Sources on page x for more Oracle E-Business Suite product information.

## Documentation Accessibility

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## Structure

**1 Overview of Site Hub**
**2 Setting Up**
**3 Role Based Security**
**4 Site Hub Administrator**
**5 Site Management**
**6 Site Mapping**
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# Related Information Sources

## Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the Oracle E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

## Oracle Product Information Management User's Guide

Oracle Product Information Management is an enterprise data management enabling customers to centralize all product information from heterogeneous systems, creating a single view of product information that can be leveraged across all functional departments.

## Oracle Trading Community Architecture User Guide

Trading Community Architecture (TCA) enables different Oracle E-Business Suite of applications to store the definitions of parties, party sites, party relationships, and contacts.

# Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite

automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

# 1

# Overview of Site Hub

This chapter covers the following topics:

- Overview of Site Hub
- Overview of Site Hub User Roles

## Overview of Site Hub

Oracle Site Hub provides a data hub to store and maintain all information about sites in organizations. A site is defined as a place of business interest. Examples include stores, warehouses, manufacturing plants, distribution centers, retail locations, and executive offices. Sites have attributes such as spatial and geographic locations, legal and physical entities; and can include groupings and hierarchies. Site Hub enables a business to have a unified view of all aspects of the site in a central place. It offers organizations functionality to centrally maintain sites and capture the site lifecycle, and includes the following features:

- Multiple methods for site creation including templates, copying, importing, or web services. After creation, sites can be updated and maintained.
- Associated site attributes for capturing functional areas including business characteristics, physical characteristics, financial information, competitive information, and demographic data. Site Hub provides seeded attributes, and you can define an unlimited number of additional attributes specific to your business requirements.
- Site clusters to group shared characteristics.
- Site hierarchies providing a classification of relationships needed for your business.
- Two user roles are provided: The Site Management Administrator role is used for setup, and the Site Management User role includes site management functionality.
- Role based access control providing security for site and hierarchy data objects

determined by a an individual user or group's role.

- Mapping functionality for geographic locations is provided using Google Maps.

### Integration with Oracle Applications

**Oracle Enterprise Asset Management**

Enterprise Asset Management enables maintenance of an organization's sites assets such as machines, fixtures, and anything requiring maintenance.

**Oracle Inventory**

Site Hub enables you to create and maintain Oracle Inventory organizations associated with sites.

**Oracle Property Manager**

You can access Oracle Property Manager directly from Site Hub to manage property locations and leases associated with sites.

**Oracle Trading Community Architecture (TCA)**

Trading Community Architecture enables Site Hub to store party relationships, and capture contact attributes associated with the site. This includes TCA entities such as parties, party sites, party relationships, and contacts.

**Oracle Universal Content Management (UCM)**

UCM enables corporations to store documents in a central document management repository and share it across multiple applications. Oracle E-Business Suite entities may have unstructured data attachments in folders and files. These attachments can be enabled for business entities. See: E-Business Suite Attachments, *Oracle Product Information Management User's Guide*

## Overview of Site Hub User Roles

Oracle Site Hub provides two user roles: Site Management Administrator and Site Management User.

### Site Management Administrator Role

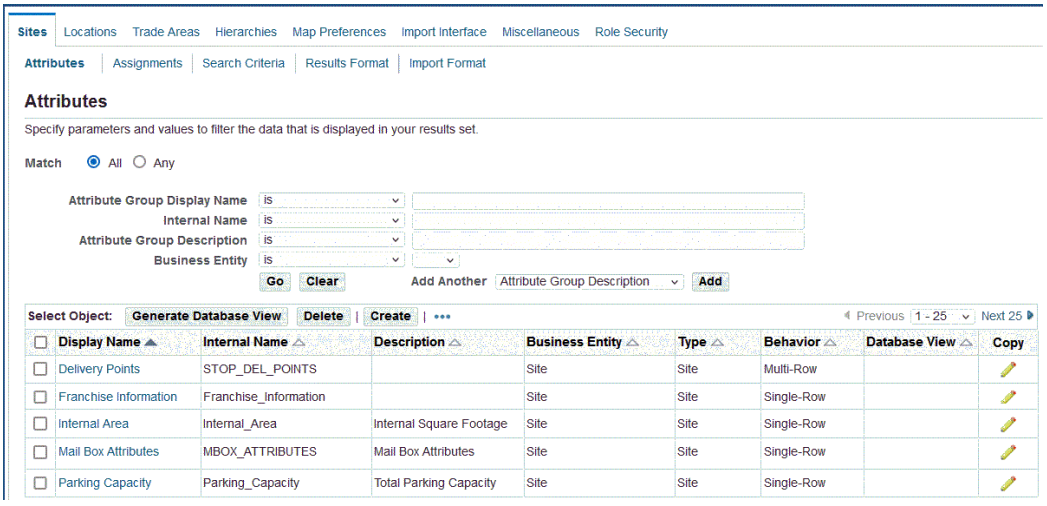
The Site Management Administrator role workbench page contains the following subtabs:

- Sites: Attributes, assignments
- Locations: Attributes, assignments
- Trade Areas: Trade area groups, attributes, assignments

- Hierarchies: Attributes, assignments, display settings for icons and attributes pages, relationship rules
- Map Preferences: Site map preferences, geocodes
- Import Interface: Scheduling of requests
- Miscellaneous: Value sets and functions
- Role Security: User groups, roles, role permissions

Site Hub supports user-defined attributes for sites, locations, trade areas, and hierarchies. An administrator defines attribute groups, assignments, and attribute pages (or views). Search criteria and results formats are defined in this role to help in searching for sites. You can also define import formats for new site creation. Two search functions are provided to find existing records. For simple searches you can use attributes, assignments, and criteria. This enables you to navigate to site records, and view and update information. Additionally you can use conditional qualifiers in searching for attributes.

The Site Management Administrator role is also used to import third-party data to generate a database view of existing attributes and custom code, configure the map display, access the Geocoder program, configure the Hierarchy Workbench, associate value sets, and define role security.




## Site Management User Role

The Site Manager User role is a workbench with tabs for Home, Sites, Hierarchies, and Clusters. The page contains a Notifications region to navigate to message information and enter a response.

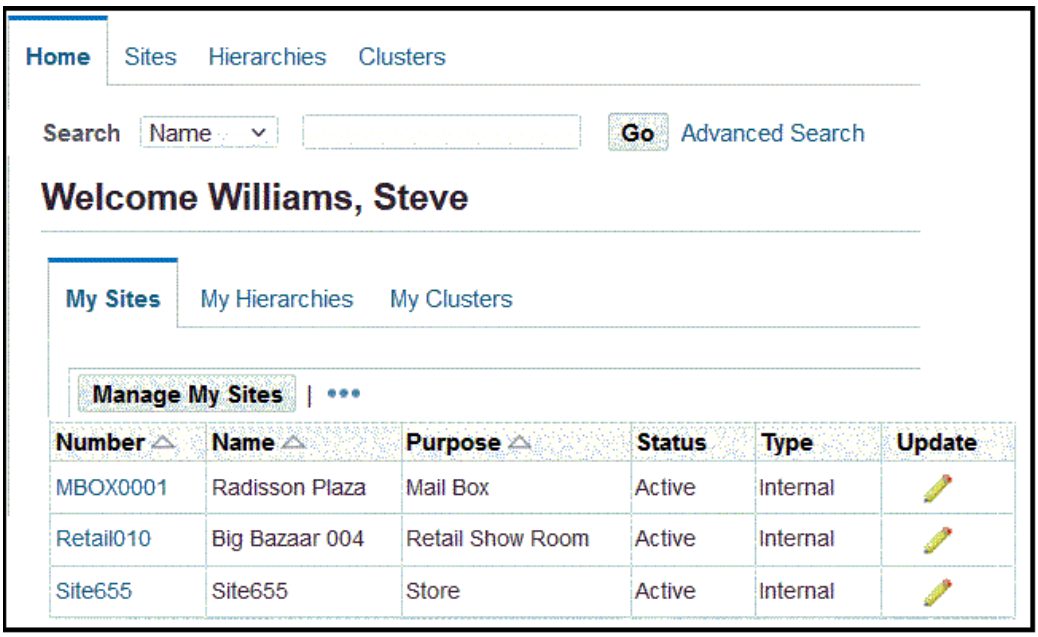
- Home: This region has three tabbed areas—My Sites, My Hierarchies, and My

Clusters. These regions enable you to access more frequently used records. The records appearing in each region are selected in the Manage pages. See: Overview of Site Management, page 5-1

- Sites: Displays the Sites Simple Search page. You can navigate to pages to manage site, cluster, hierarchy, and template records. See: Searching for Information, page 5-3

- Hierarchies: Displays the Hierarchies Simple Search page where you can navigate to pages to view, create, update hierarchy records, and access the Hierarchy Workbench. See: Viewing Site Hierarchies, page 7-6

- Clusters: Displays the Clusters Simple Search page where you can navigate to pages to view, create, and update cluster records. See: Viewing and Creating Site Clusters, page 5-37




## Related Topics

Overview of Administrator Role, page 4-2

Searching for Information, page 5-3

Site Attributes, page 4-5

Creating Sites, page 5-11

Site, Location, and Trade Area Attributes, page 4-3

Viewing Site Map Details, page 6-8

# 2

# Setting Up

This chapter covers the following topics:

- Setting Up Oracle Site Hub
- Defining Lookups and Profile Options

## Setting Up Oracle Site Hub

This section contains an overview of the tasks required to set up Oracle Site Hub.

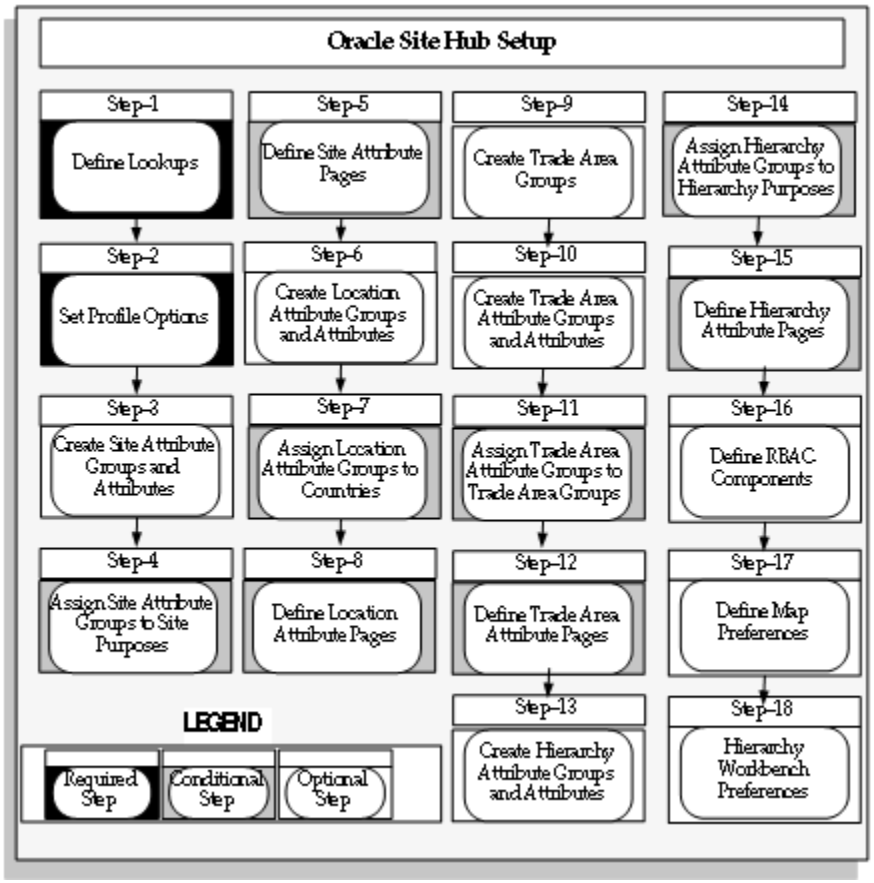
### Set Up Underlying Oracle Applications Technology

You need to complete the following setup steps:

- Performing system-wide setup tasks such as configuring concurrent managers and printers.
- Managing data security, which includes setting up responsibilities to allow access to a specific set of business data and complete a specific set of transactions, and assigning individual users to one or more of these responsibilities.
- Setting up Oracle Workflow.

### Site Hub Setup Steps

The following chart lists the setup steps for Site Hub. Some steps are required, others are optional or conditional upon other setup steps.




1. **Define Lookups (Required)**

   Lookups are used to display information in your pages and windows. See: Site Hub Lookups, page 2-4

2. **Set Profile Options (Required)**

   Profile options specify how Site Hub controls access and processes data. See: Profile Options, page 2-6

3. **Create Site Attribute Groups and Attributes (Optional)**

   Attributes associated to a site capture characteristics. Site Hub provides seeded attributes and you can define additional attributes specific to your business requirements. See: Site Attributes, page 4-5

4. **Assign Attribute Groups to Site Purposes (Required if Creating Site Attribute Pages)**

   Assigning a site attribute group to a site purpose is used for viewing and editing associated attributes for sites with corresponding purposes, and required if creating site attribute pages. See: Viewing, Creating, and Editing Site Attribute Groups, page

4-6

5. **Define Site Attribute Pages (Required if Site Attribute Groups Defined)**

   You can create attribute pages to group and categorize site records for ease of data entry and viewing. See: Creating Site Attribute Pages, page 4-16

6. **Create Location Attribute Groups and Attributes (Optional)**

   The location of a site can be any geographical place associated in the context of a country. The location of a site can be an actual or planned structure such as a building or occupied area. See: Location Attributes, page 4-20

7. **Assign Location Attribute Groups to Countries (Required if Creating Location Attribute Pages)**

   Assigning a location attribute group to a country is used for viewing location attributes, and required if creating location attribute pages. See: Viewing and Creating Location Attribute Assignments, page 4-25

8. **Define Location Attribute Pages (Required if Location Attribute Groups Defined)**

   You can create attribute pages to group and categorize location records for ease of data entry and viewing. See: Creating Location Attribute Pages, page 4-27

9. **Create Trade Area Groups (Optional)**

   Trade area groups define trade area regions. You can define any number of trade area groups, and each trade area group can contain up to 5 area groups, for example—primary, secondary and tertiary trade areas. They can be viewed on a map as concentric circles around your sites. See: Viewing and Creating Trade Area Groups, page 4-29

10. **Create Trade Area Attribute Groups and Attributes (Optional)**

    Trade area groups are typically used for site selection screening and market analysis. You can define multiple trade area attribute groups and attributes for each of your sites, enabling you to capture demographics using site and location attributes. See: Trade Area Group Attribute Groups, page 4-33

11. **Assign Trade Area Attribute Groups to Trade Area Groups (Required if Creating Trade Area Group Attribute Pages)**

    Assigning a trade area attribute group to a trade area is used for viewing associated attributes, and required if creating trade area group attribute pages. See: Viewing and Creating Trade Area Group Attribute Assignments, page 4-37

12. **Define Trade Area Attribute Pages (Required if Trade Area Attribute Groups Defined)**

You can create attribute pages to group and categorize trade area group records for ease of data entry and viewing. See: Viewing and Creating Trade Area Group Attribute Assignments, page 4-37

13. **Create Hierarchy Attribute Groups and Attributes (Optional)**

    Hierarchies are used for grouping business functions and showing the relationships between sites. You can define multiple hierarchy attribute groups and attributes for each of your hierarchies, enabling you to capture characteristics. See: Viewing, Creating, and Editing Hierarchy Attribute Groups, page 4-39

14. **Assign Hierarchy Attribute Groups to Hierarchy Purposes (Required if Creating Hierarchy Attribute Pages)**

    Assigning a hierarchy attribute group to a hierarchy purpose is used for viewing associated attributes, and required if creating hierarchy group attribute pages. See: Viewing and Creating Hierarchy Attribute Assignments, page 4-45

15. **Define Hierarchy Attribute Pages (Required if Hierarchy Attribute Groups Defined)**

    You can create attribute pages to group and categorize hierarchy group records for ease of data entry and viewing. See: Creating Hierarchy Attribute Pages, page 4-49

16. **Define Role Based Access Components (Optional)**

    Role based access control provides the ability to view, edit, and perform certain actions determined by the role of an individual or group. You can define roles to the site and hierarchy object, and assign privileges to defines a user's access. See: Overview of Role-based Security Access, page 3-1

17. **Define Map Preferences (Optional)**

    Site Hub offers the ability to view sites on a map using Google Maps. You can set site icons, launch a geocoder program to geocode sites and configure views for visualizing site specific data in Google Maps. See: Defining Site Map Preferences, page 6-2

18. **Define Hierarchy Workbench Preferences (Optional)**

    The Display Settings page is used to upload images as markers for particular hierarchy and site purposes, and associate attribute pages for viewing on the Hierarchy Workbench. This offers a visualization of hierarchies and associated site purposes. See: Viewing and Defining Hierarchy Display Settings, page 4-51

## Defining Lookups and Profile Options

## Site Hub Lookups

Lookups are used to display information in your windows. Each lookup has a code and a meaning. When you enter a valid Lookup Meaning into a displayed window field, the lookup stores this code into a corresponding hidden field.

| Type | Meaning | Usage |
|---|---|---|
| RRS_ADDIT_SITES_SEARCH_TYPE | Additional Sites Search Type | Used by key site type search, values are:<br>• RRS_WITHIN_SEARCH for searching within radius of key sites.<br>• RRS_INTERSECTING_SEARCH for intersecting with key sites. |
| RRS_BRAND_NAME | Brand Name | Define brand names to associated sites |
| RRS_GEOMETRY_TYPE | Geometry Type | Setting geometry type for site map, values are:<br>• Point<br>• Polygon |
| RRS_HIERARCHY_PURPOSE | Hierarchy Purpose | Define hierarchy Purpose |
| RRS_NODE_PURPOSE | Hierarchy Node Purpose | Define hierarchy Node Purpose |
| PARTY_SITE_USE_CODE | Party Site Code | Define additional site purposes<br>New site purposes are created in the Oracle Receivables Manager responsibility, the Receivables Quickcodes Setup window. Query the Party Site Use Code lookup to evaluate if an existing code can be re-used, or add a new entry. |

For more information, see:

- Defining Receivables Lookups, *Oracle Receivables Implementation Guide*
- Application Utilities Lookups and Application Object Library Lookups, *Oracle E-Business Suite Developer's Guide*

## Profile Options

During your implementation, you set profile options to specify how the application controls access and processes. Profile options can be set at one or more of the following levels: site, application, responsibility, and user. The levels are set in the columns for User, System Administrator User, System Administrator Responsibility, System Administrator Application, and System Administrator Site. The following values are used:

- Yes—you can update the profile option
- View Only—you can view the profile option value in the Profiles window, but you cannot change
- No—you cannot view or change the profile option value

***Site Hub Profile Options***

| Profile Option | User | System Admin User | System Admin Resp | System Admin App | System Admin Site | Required | Default Value |
|---|---|---|---|---|---|---|---|
| CSF: Google Map Key | View Only | Yes | Yes | Yes | Yes | No | Null |
| EGO: Enable exporting to Excel | Yes | Yes | Yes | Yes | Yes | No | No |
| RRS:Auto Assign Hierarchy Author Role | View Only | Yes | Yes | Yes | Yes | No | No |

| Profile Option | User | System Admin User | System Admin Resp | System Admin App | System Admin Site | Required | Default Value |
|---|---|---|---|---|---|---|---|
| RRS:Auto Assign Site Author Role | View Only | Yes | Yes | Yes | Yes | No | No |
| RRS: Auto Default Site Number | View Only | Yes | Yes | Yes | Yes | No | No |
| RRS: Default Geocoding Preference | Yes | Yes | Yes | Yes | Yes | No | System Generated |
| RRS: Enable Business Events | View Only | Yes | Yes | Yes | Yes | No | Null |
| RRS: Google Map Client ID | View Only | Yes | Yes | Yes | Yes | No | Null |
| RRS: Hierarchy UI Custom URL | View Only | Yes | Yes | Yes | Yes | No | Null |
| RRS: Role Based Security Enabled | No | No | No | No | Yes | No | No |

| Profile Option | User | System Admin User | System Admin Resp | System Admin App | System Admin Site | Required | Default Value |
|---|---|---|---|---|---|---|---|
| RRS: Trade Area Group Map Layout Type | Yes | Yes | Yes | Yes | Yes | No | Unfilled |

#### Site Hub Profile Option Descriptions

- **CSF:Google Map Key**
  - If you are using Google Maps JavaScript API Version 2, you are required to obtain a registration key from Google, Inc. to use the Google Map functionality. This profile option is used to enter the registration key value.
  - If you are using Google Maps JavaScript API Version 3, this key is not required.
- **EGO: Enable exporting to Excel**

  This profile is required to be set to Yes to use import and export functionality in Site Hub.
- **RRS:Auto Assign Hierarchy Author Role**

  Values are Yes or No. When this profile is set to Yes, the author role for sites created is automatically granted to the user. Auto-assigning of author roles enables users to have continued update access for other details of the site immediately after its creation.
- **RRS:Auto Assign Site Author Role**

  Values are Yes or No. When this profile is set to Yes, the author role for hierarchies created is automatically granted to the user. Auto-assigning of author roles enables users to have continued update access for other details of the hierarchy immediately after its creation.
- **RRS: Auto Default Site Number**

  Enables automatic numbering of the site identification number when creating new sites. This includes site creation using the Create Site: Basic Information page, Web Services, and Excel export and import functions.
  - Yes: The Site Number value is defaulted to the next value in the sequence for each new site record. The numbering sequence begins at 10,000.

- No: The Site Number value does not appear automatically for new site records.

- **RRS: Default Geocoding Preference**

  Determines the default value in the Geocode Source field on the Create Site: Basic Information page:

  - System Generated: The Geocoder program uses the address fields entered in the site record to find geodetic coordinates; and the program is automatically launched when the record is saved.

  - User Entered: Sites are created with the default value of Geodetic Source as User Entered. The Geocoder program is bypassed and not launched automatically upon site creation. User entered longitude and latitude values are used for mapping purposes.

- **RRS: Enable Business Events**

  Determines whether or not Business Events supported within the product are raised. By default no value is shipped for this profile, indicating that no Business Events are raised by default. Values are Yes or No. This option is set at the Site level only.

- **RRS: Hierarchy UI Custom URL**

  Enables data displayed on the panes in the Hierarchy Workbench to be passed to a custom object or page. This data can be details about one of the objects on the Hierarchy Workbench such as the hierarchy, associated site, or hierarchy node. When the Callout button is selected on the Hierarchy Workbench, you can navigate to the custom page designated in this profile. You can then perform a transaction on the custom page, and navigate back to the Hierarchy Workbench.

  Specify the page value in the profile option in the following format, where CustomPG is the name of your page:

  /oracle/apps/rrs/site/user/webui/CustomPG

  > **Note:** This functionality only moves data to Oracle Applications Framework pages.

  Setting Up a Custom Hierarchy Page, page B-1

- **RRS:Google Map Client ID**

  Required if you are using Google Maps. This is the client identification value provided by Google Inc. when you register for the Google Map key. See: google.com/enterprise/

- **RRS: Role Based Security Enabled**

Enables the role based security feature for site and hierarchy objects in your organization. Values are Yes or No. This profile option is No by default and can be changed. This option is set at the Site level only

- **RRS: Trade Area Group Map Layout Type**

  Indicator setting whether trade areas appear color-filled or unfilled in the Google Maps display. Values are Filled or Unfilled (default).

  **Additional Information:** There are a number of Site Hub profile options in the application that will be used in a future release.

Overview of Site Hub Map Functionality, page 6-1

Overview of User Profiles, *Oracle E-Business Suite User's Guide*

Setting Your Personal User Profile, *Oracle E-Business Suite User's Guide*

# 3

# Role Based Security

This chapter covers the following topics:

- Overview of Role Based Security Access
- Setting Up Role Based Access Control
- Creating User Defined Privileges
- Viewing and Defining User Groups
- Viewing and Defining Roles
- Viewing and Assigning Roles

## Overview of Role Based Security Access

Role based access is used to control security access for sites, site attributes, hierarchies, and hierarchy attributes. Create access for sites and hierarchies is controlled by assigning a responsibility to a user with the appropriate create function included in the responsibility's menu. View and Edit access for sites, hierarchies, and their attributes is granted to the users as a role assignment.

Data access security controls are enforced through all user interfaces in Oracle Site Hub, including but not limited to the Hierarchy Workbench transactions, Web Services, import interfaces, Public APIs, and Web ADI for import/export of sites. Role based security setups for User Groups, Roles, and Role Assignments are viewed and defined in the Role Security tabbed region of the Site Administrator responsibility.

### Role Based Viewing and Editing Ability

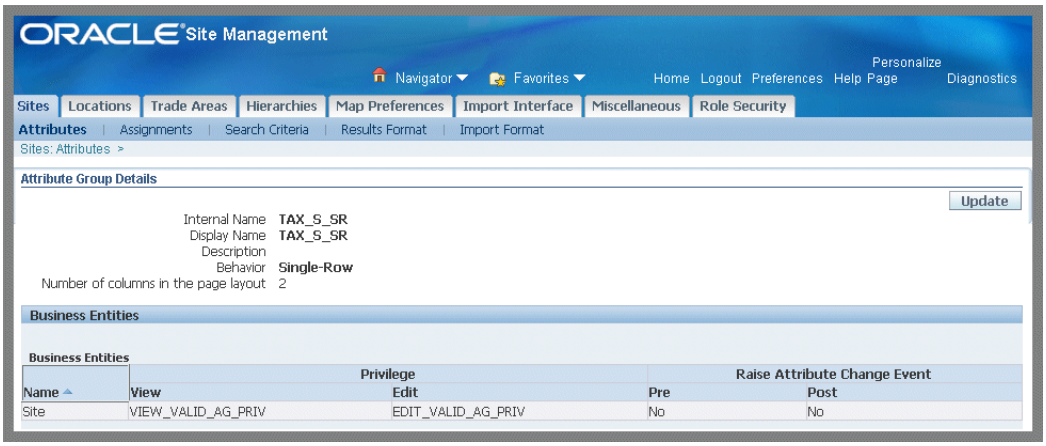
Role based access security enables you to restrict viewing or updating specific attributes to maintain the confidentiality of site information. You can set privileges for a group of attributes within the appropriate sites.

Attribute security is enforced on all attributes of an attribute group based on the user defined view and edit privileges associated at the attribute group level. Privileges are

defined using the Form Function window in the context of the site or hierarchy object.

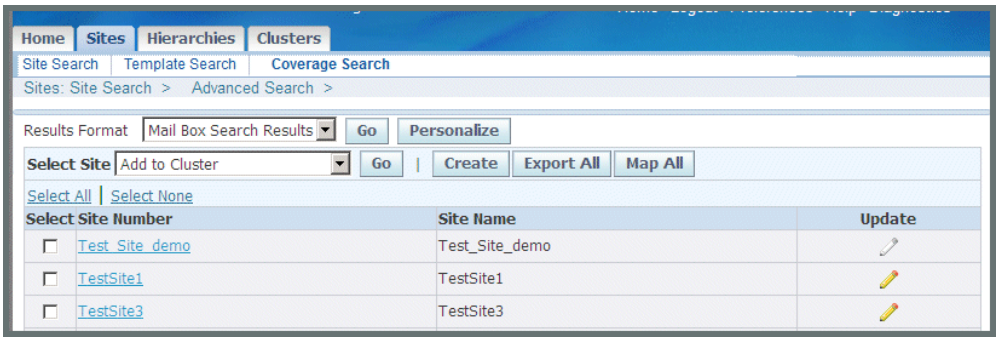
The following fields are provided in the Attribute Group Details page to employ role based access security:

- View: This privilege enables users to view attribute groups associated to their roles.
- Edit: This privilege enables users to edit attribute groups associated to their roles.




Edit and view rights are separate privileges grouped together in a user role, and granted to each user or user group in role assignments. The following behavior occurs when role based access security is set up in your environment:

- A user having edit privilege also needs view privilege to be able to edit the record. If only view privilege is granted, sites and hierarchies cannot be created or edited. For records where view and edit privileges are not granted—the Update and Create buttons icons are disabled on Sites, Templates, Hierarchies, and Clusters pages.

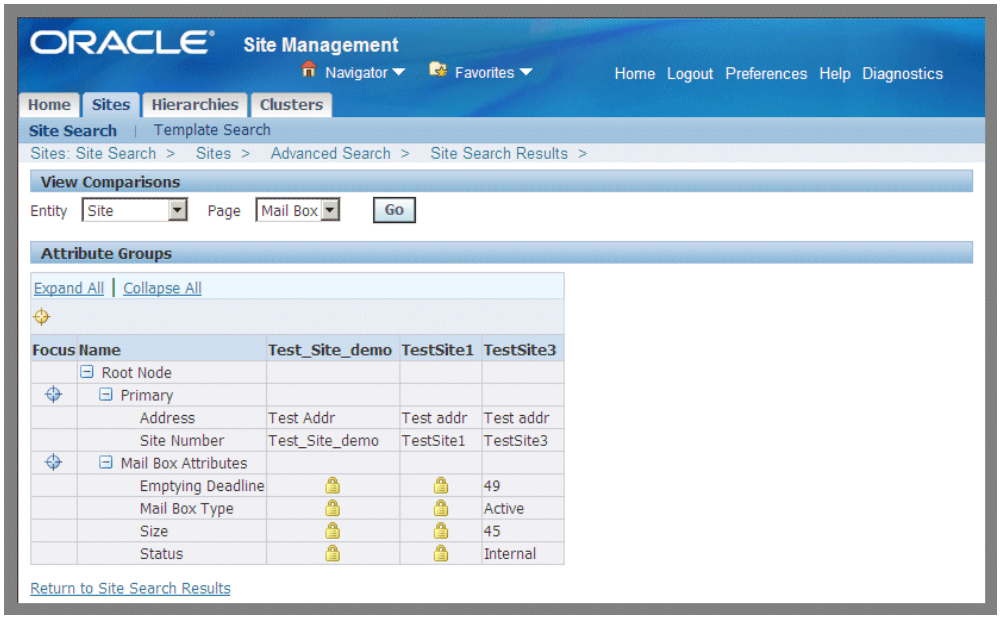



- If Privilege fields are left unassigned for an attribute group, role based security is not enforced for the attributes belonging to the attribute group. All users can view and edit the attribute values of that attribute group.
- If only the edit privilege is assigned and the view privilege is left blank; all users can view attribute values of the attribute group. However, update is restricted to

users having edit privileges assigned.

- Attribute fields are visible to users or groups with view privilege for a particular attribute group, otherwise the entire attribute group is hidden to the user. If a user does not have view privilege for any of the attributes on a page, the entire page is not visible to that user.

- When performing Simple and Advanced Search functions, Viewing Comparisons, Site Map displays, and Hierarchy Workbench transactions—attribute fields are visible when users have view privilege for particular attribute groups, otherwise a lock icon appears.

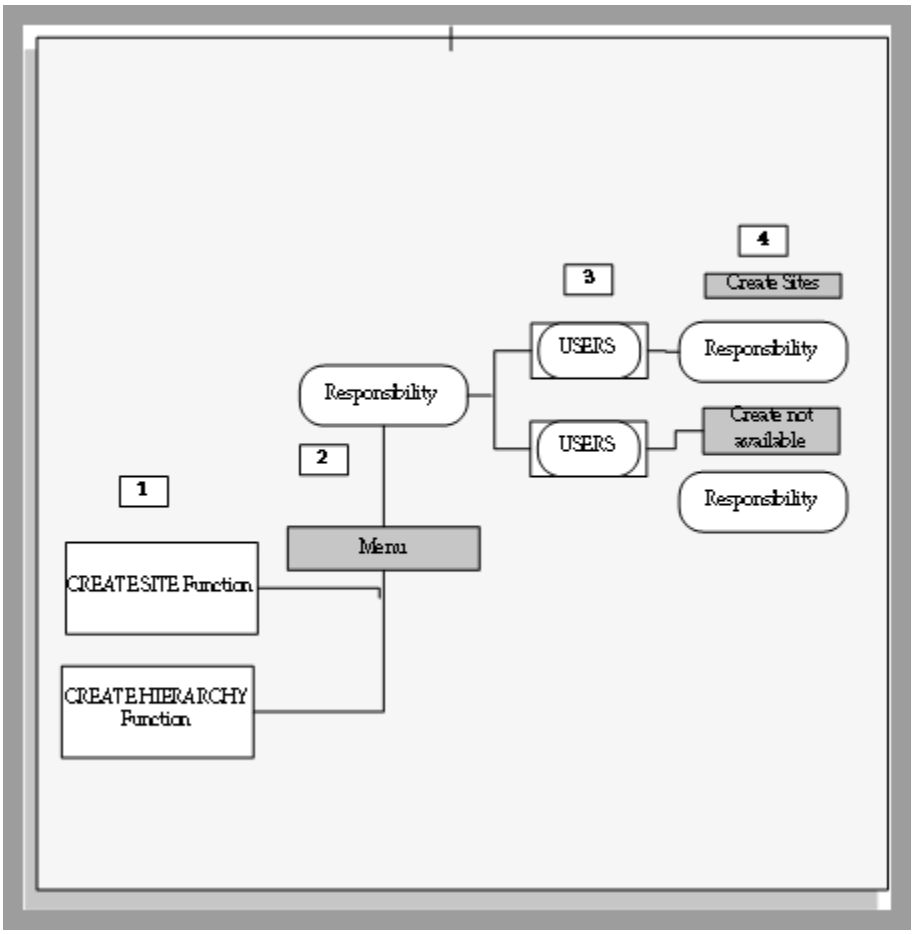



- Users must have view privilege in order to add sites and hierarchies to Favorites records; and to add sites to cluster records.

### Setting Up Create Ability

Role based access control uses function based security for the two supported Site Hub create functions, Create Site and Create Hierarchy. Users who can Create Sites or Create Hierarchies must have a responsibility assigned to their application user account, including the Create functions as part of the assigned menu. The Site Management User responsibility menu, shipped with the product, includes these functions. If you would not like certain users to be able to create Sites or hierarchies, create new responsibility excluding the relevant Create functions and assign the responsibility to those user accounts.

The following graphic displays the Create function behavior for menus and responsibilities for sites and hierarchies:




1. The following Create functions are provided and supported:
   - Creating new sites: RRS_CREATE_SITE
   - Creating new hierarchies: RRS_CREATE_HIER
2. You can add or remove these functions from menus associated to responsibilities. Use the Responsibilities window in the System Administrator responsibility to create new responsibilities and manage menu exclusions.

   You can add or remove create functions from a user responsibility to control Create Site and Create Hierarchy abilities.
3. Users are uniquely identified by a username. Users can be assigned the relevant responsibility, that may include or exclude the Create functions. Use the Users window in the System Administrator responsibility to create new and manage existing application users.
4. This enables you to control the visibility of Create buttons to a specific set of users in your organization, and block other users.

Function security for creating sites and hierarchies, once setup, applies to all interfaces supported within Site Hub including the Site tabbed region, Hierarchy tabbed region, Hierarchy Workbench, Web ADI based upload, and Web Services.

**Role Based Access Behavior in the Hierarchy Workbench**

In the Hierarchy Workbench, view privilege is required to display hierarchy and it's attributes. To be able to edit a hierarchy, both view and edit privileges are required:

- Adding a parent to a site, or adding a child node to a site, are edits to the hierarchy—not to the site.
- If view and edit hierarchy rights are not granted, you cannot add a site to the hierarchy by searching for it. However, if you access to a hierarchy including privileges for viewing the site, only the site name is visible in the hierarchy and there is no link available for either display of attributes or update.

  However, if such a site exists in another hierarchy where the user has view access, that user has the ability to drag the site records from that hierarchy to another hierarchy where they have edit privileges.
- Although, the system does not allow the user to view such site details, you can prevent this behavior by not granting view access to users for specific hierarchies having non-accessible sites to the users.

### Related Topics

Setting Up Role Based Access Control, page 3-5

Viewing and Defining User Groups, page 3-9

Viewing and Defining Roles, page 3-12

Viewing and Assigning Roles, page 3-16

## Setting Up Role Based Access Control

Role based access control provides security for objects in Site Hub to manage secure data. The ability to view, edit and perform certain actions is determined by a user's role and associated privileges. See: Overview of Role Based Security Access, page 3-1

To implement role based access security, perform the following tasks:

| Task | Description | Required? |
| --- | --- | --- |
| Set Profile Options, page 2-6 | Set the following profiles to enable and govern role based access control:<br>• RRS: Role Based Security Enabled<br>• RRS:Auto Assign Hierarchy Author Role<br>• RRS:Auto Assign Site Author Role | Yes |
| Define Users | Defined in the Users window; individuals are uniquely identified by a username, see:<br>Users Window, *Oracle E-Business Suite System Administrator's Guide - Security* | Yes |
| Define User Groups, page 3-9 | You can group multiple users requiring the same access. | No |
| Set Up Create Functions, page 3-3 | You can add or remove create functions from menus associated to responsibilities to control page level security and the menu exclusions. | No |
| Creating User Defined Privileges, page 3-7 | User defined privileges are tailored to control security for interactions in your organization. | No |
| Define Roles, page 3-9 | A role is a collection of privileges assigned to a person or group. Several seeded roles and privileges are provided. | Yes |

| Task | Description | Required? |
|---|---|---|
| Assign Roles, page 3-16 | Role assignment determines actions a user can perform. | Yes |

## Roles and Privileges

A role is a collection of privileges; privileges define access. Roles group privileges for assignment to a user or group of users at an aggregate level, defining functions a user is allowed. Users can be assigned multiple roles which cumulatively describe the functions of the job. For example, you can set specific users who are allowed to view financial data for each site.

You assign roles to site and hierarchy objects. You can group multiple employees requiring the same level of privilege. Role based access security provides the ability to:

- Assign Site Hub roles at specific levels
- Specify default roles for all sites or hierarchies in an organization
- Create user groups based on similar functional interactions

Site Hub provides several seeded roles and privileges; you can also create roles and privileges to fit the custom needs of your organization.

**Seeded Roles and Privileges**

The seeded roles and privileges provide the basic view and edit access in role based security. The following is the list of seeded roles and privileges in Site Hub:

| Object | Role | Privilege |
|---|---|---|
| Site | Site Author | View Site |
| Site | Site Author | Edit Site |
| Hierarchy | Hierarchy Author | View Hierarchy |
| Hierarchy | Hierarchy Author | Edit Hierarchy |

**Note:** The roles based access security feature does not secure attributes for location and trade area group user attributes.

**Note:** Edit and View rights are separate, that is, a user having edit site privilege would not be able to view a site if view site privilege is not granted.

## Creating User Defined Privileges

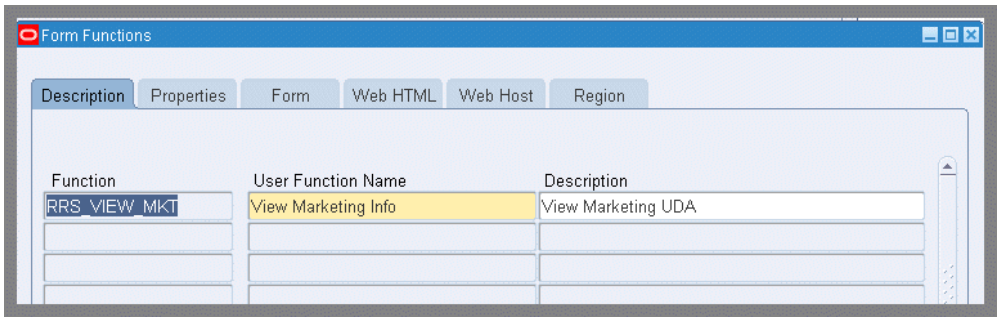
You can create custom roles and user defined privileges to control functional interactions to govern security for attribute groups. If there are multiple attribute groups in a particular page, only those attribute groups you are granted view privilege appear in the page. For example:

- You want to collaborate securely to share information between internal departments and external contractors.
- Roles are created for Site Market Manager and Location Engineer.
- The Site Market Manager has view and edit privileges for specific site attribute groups such as the Site Brand, Location, and Site Purpose.
- The Location Engineer can view and edit the Location attribute, but can only view the Site Brand and Site Purpose attribute groups.

Privileges are also called functions. Define user defined privileges related to a Site or Hierarchy in the Form Functions window in the System Administrator responsibility. These functions show up as privileges in Site Hub setup pages. See: Form Functions Window, *Oracle E-Business Suite System Administrator's Guide - Security*

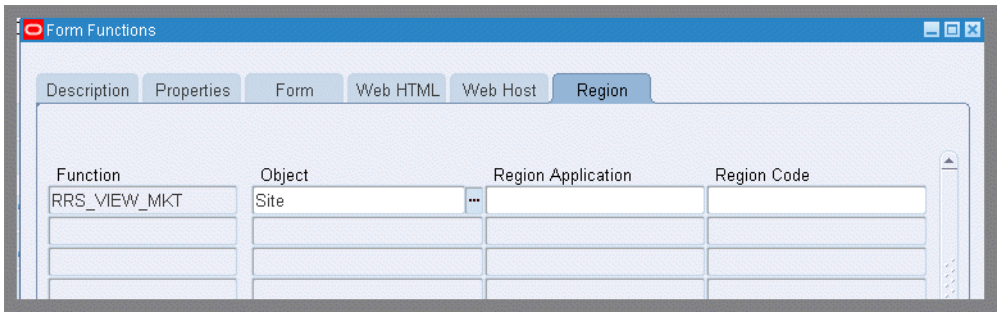
### To create user defined privilege for site and hierarchy objects:

1. Navigate to the Form Functions window.
2. In the Description tabbed region, enter the Function name.
3. Enter the User Function Name and Description describing this function.




4. In the Properties tabbed region, select the Subfunction value in the Type field.

5. In the Region tab, select the Site Hub data object for this function. Choices are Site or Hierarchy.




6. Save your work.

   The functions defined in this window are now available as privileges in Site Hub. Privileges of View and Edit in the attribute group definition (create and update pages) use these defined functions. These privileges are available to be assigned to roles.

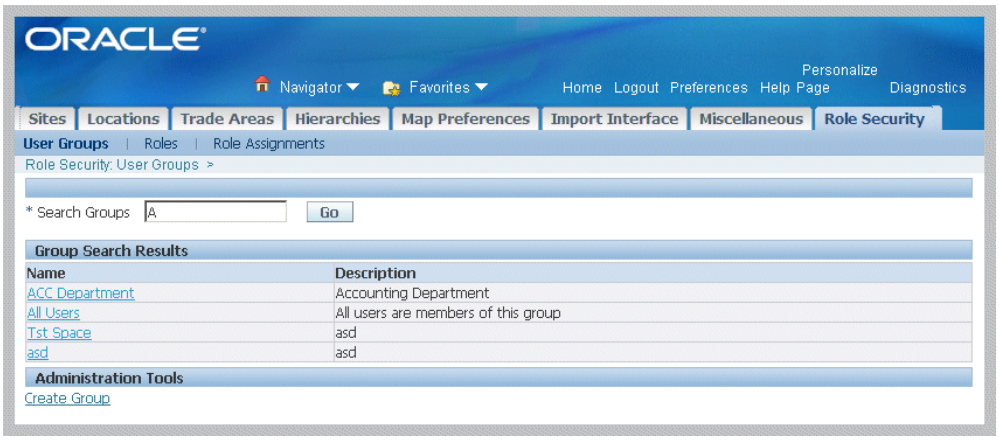
## Viewing and Defining User Groups

Roles are granted to users or user groups in the context of the data to be secured. A role security group is an assemblage of users with similar functional areas. Groups facilitate role assignments for multiple employees with the same level of access and privilege.

### To search and view role security user groups:

1. Navigate to the Groups page.

2. Enter the full or partial name of the group, and select Go.




All applicable records fitting your search criteria appear in the Group Search Results region; records are listed by Name and Description.

### To create a group:

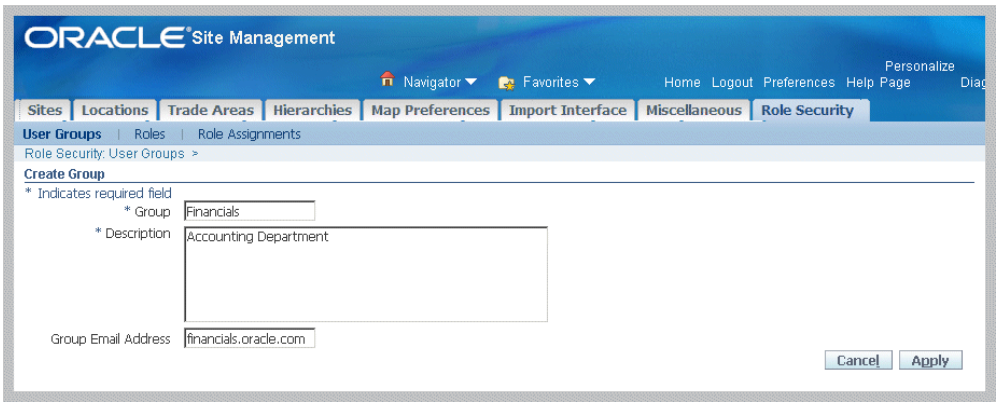
1. Select Create Group in the Administrative Tools region of the User Groups page.

2. On the Create Group page, enter values in the following fields:

   - Group, the unique name for this role user group for users with similar functions.

   - Description of this group.

   - Group Email Address.

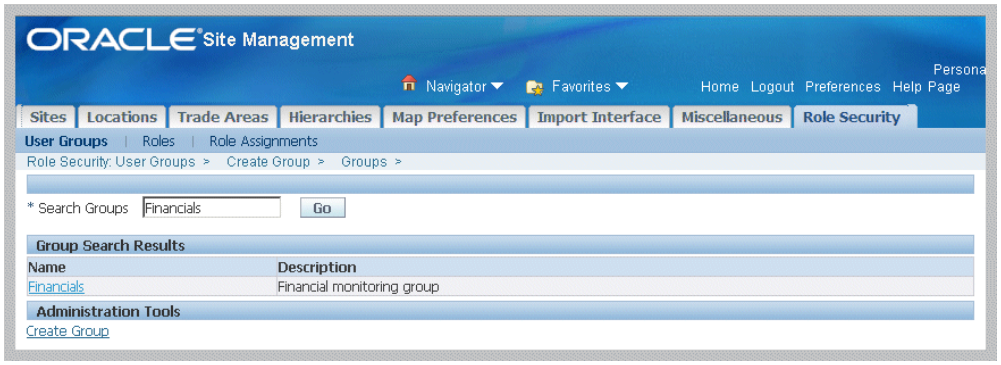



3. Save your work.

   Groups cannot be deleted. The user creating a user group is defaulted as a member, but can be removed.

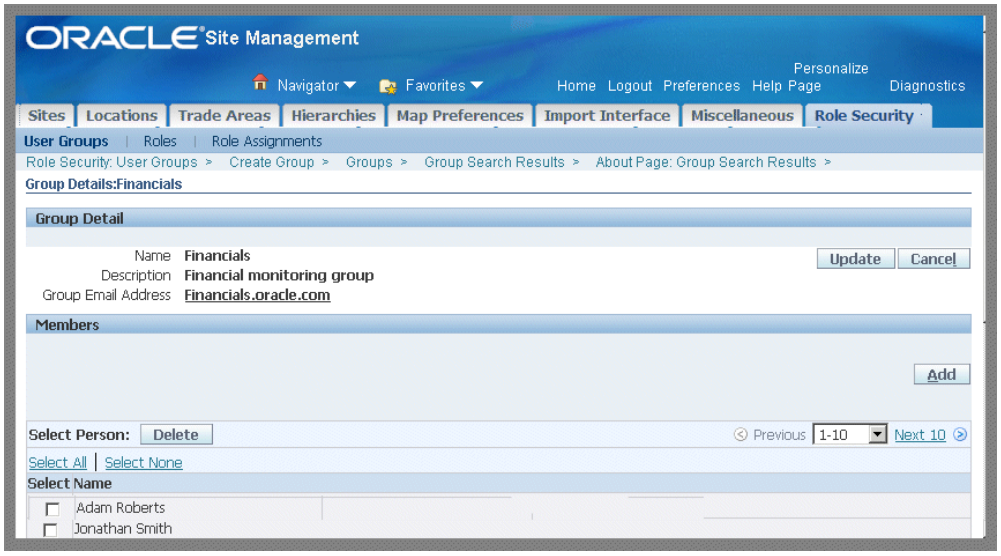
### To view and edit group details:

1. Select the group Name link in the Group Search Results region.




The Group Detail page appears and consists of two regions:

- Group Detail displays Name, Description, and Email information
- Members displays the individuals in the group

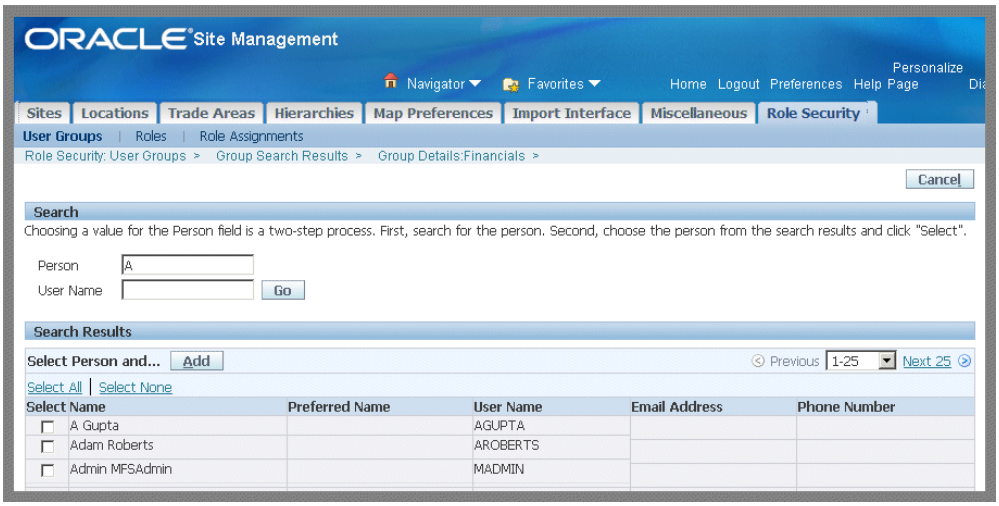



2. To remove members from the group, select the check box in the Select Name column for members you want to remove, and choose Delete.

3. Select Add to add new users to this group.

4. The Search page appears. Search by entering a word or partial word in the Person or User Name fields, and select Go.

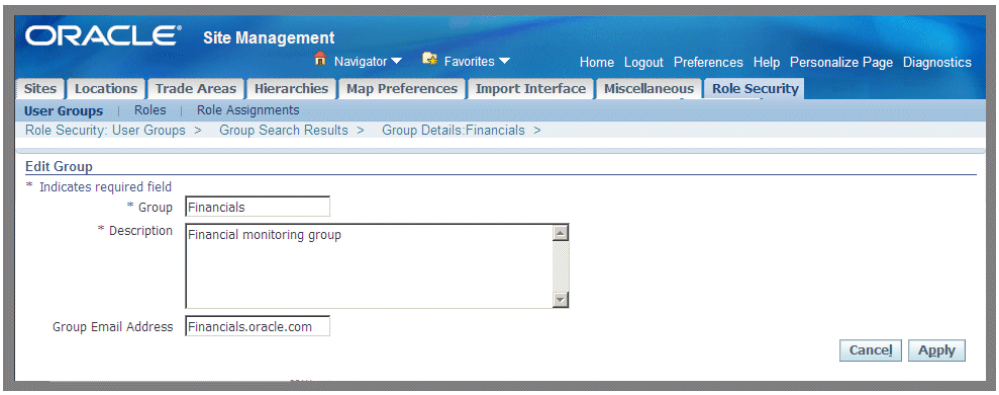
   All applicable records fitting your search criteria appear.




5. Select the Name records you want to add in the Select check boxes, and choose Add.

6. To edit user group information, on the Group Details page, select Update. The Edit Group page appears.

   You can change data in all fields: Group, Description, and Group Email Address.




7. Select Apply to save your work.

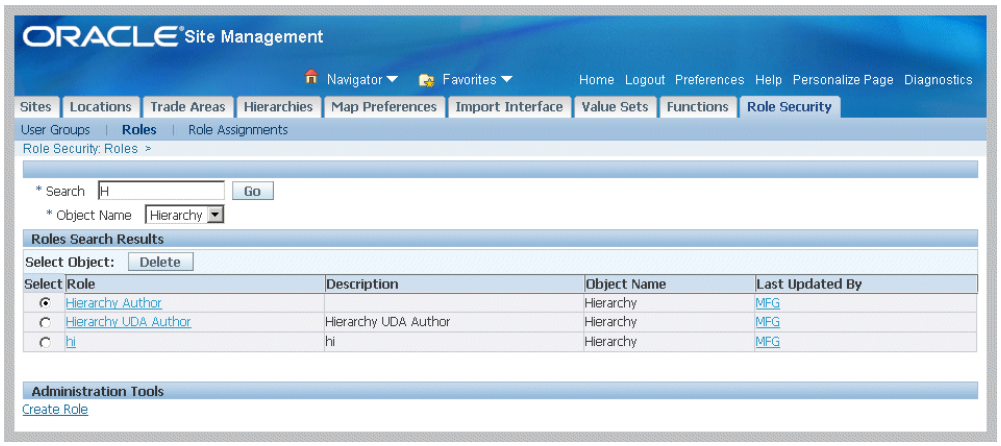
## Viewing and Defining Roles

A role is a collection of privileges assigned to a person or group based on functional tasks. For example, you may want to set specific users to see potential sites or site financial data. Roles can be assigned at particular levels for sites and hierarchies in an organization. The Roles page enables you to create, search, and manage role definitions. Two seeded roles are provided in Site Hub: Site Author and Hierarchy Author. These roles cannot be deleted or updated by users.

### To search and view security roles:

1. Navigate to the Roles page and enter the full or partial name of a role in the Search field.

2. Select a value in the Object name field, choices are Site or Hierarchy.

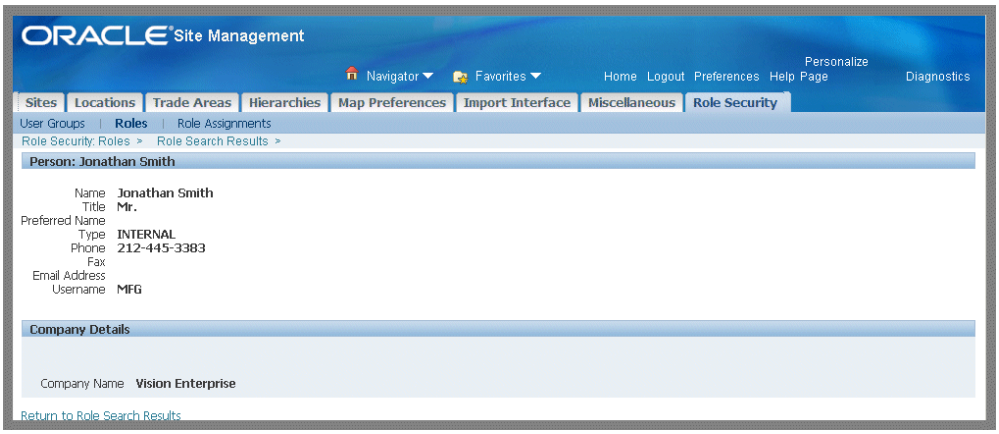



All records fitting your search criteria appear in the Role Search Results region. This region displays data on Role, Description, Object Name, and Last Updated By. You can update or delete records from this page.

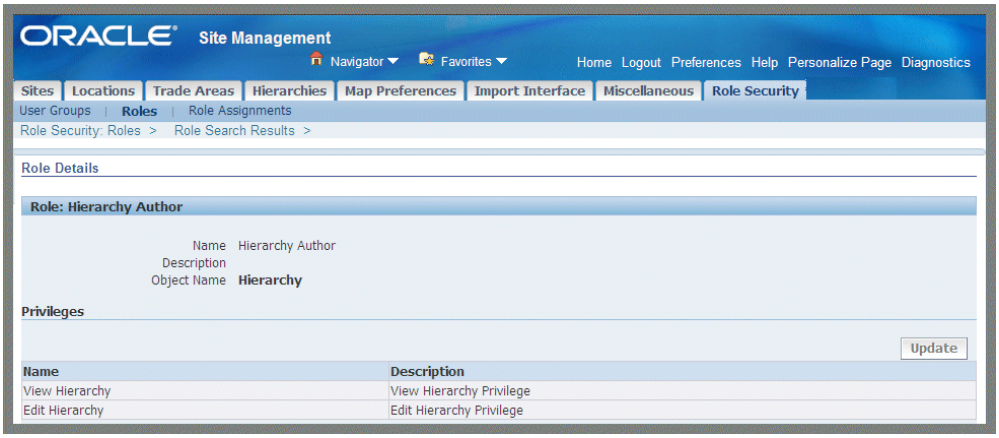
> **Note:** Only roles without assignments can be deleted.

3. Select a link in the Last Updated By field to view the details of the user who created or updated the record.

   The Person page displays information for the user login including Name, Title, Phone, Fax, Username, and Company Name.



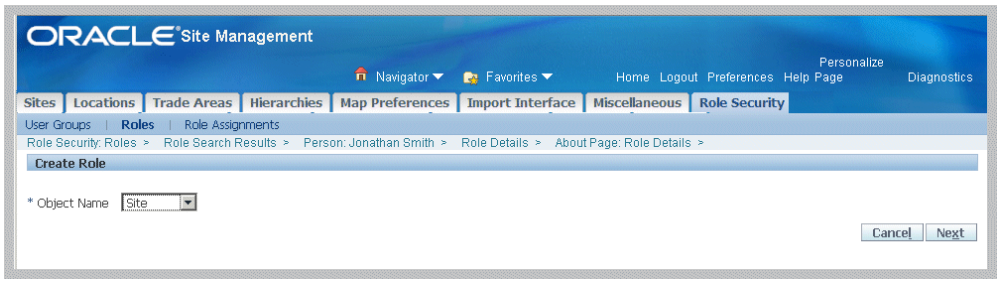

4. In the Role Search results region, select Role links to view the Role Details page for a particular record. The Role Details page also shows the privileges assigned to a role.




### To create a user role:

1. Select Create Role on the Roles page to display the Create Role page.

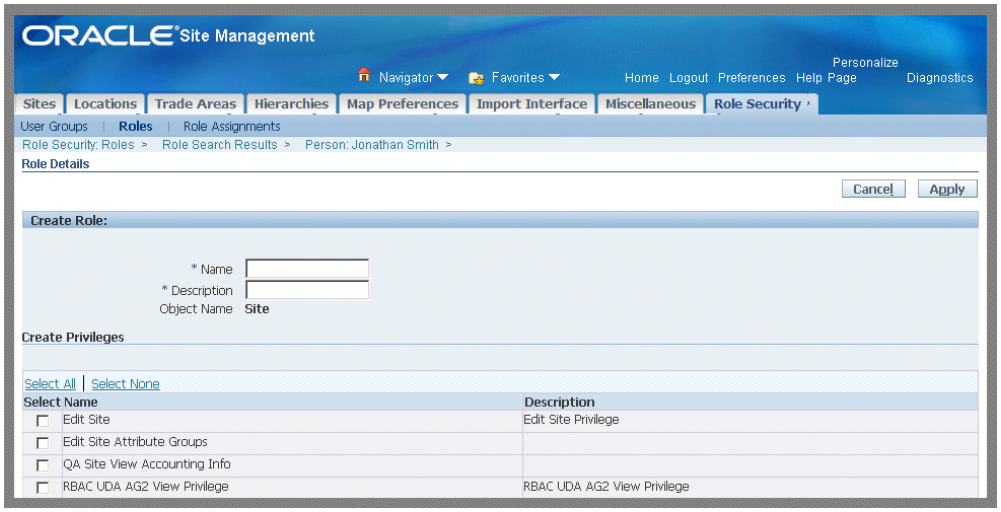
2. Select a value in the Object Name field, choices are Site or Hierarchy.




3. Select Next to navigate to the Role Details page.

4. On the Role Details page, enter unique values in the Name and Description fields.

5. In the Create Privileges region, select the privileges allowed for this role in the check box column.

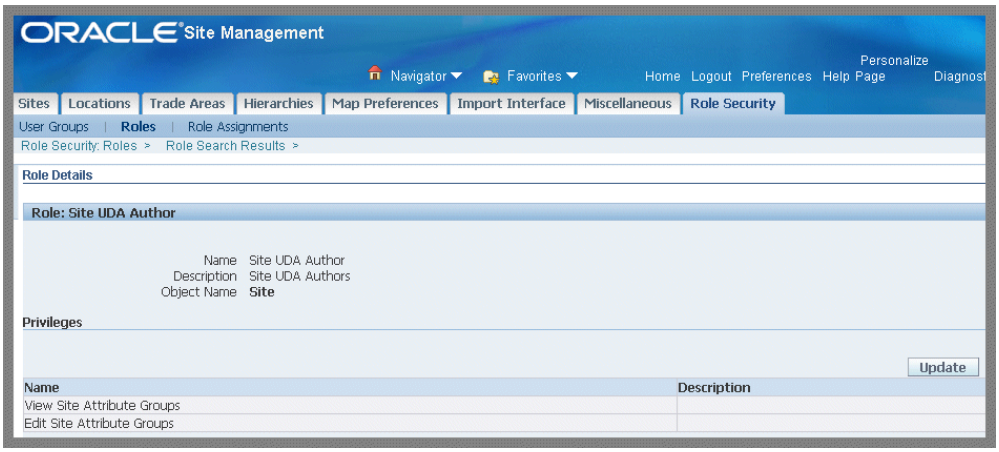



6. Select Apply to save your work.

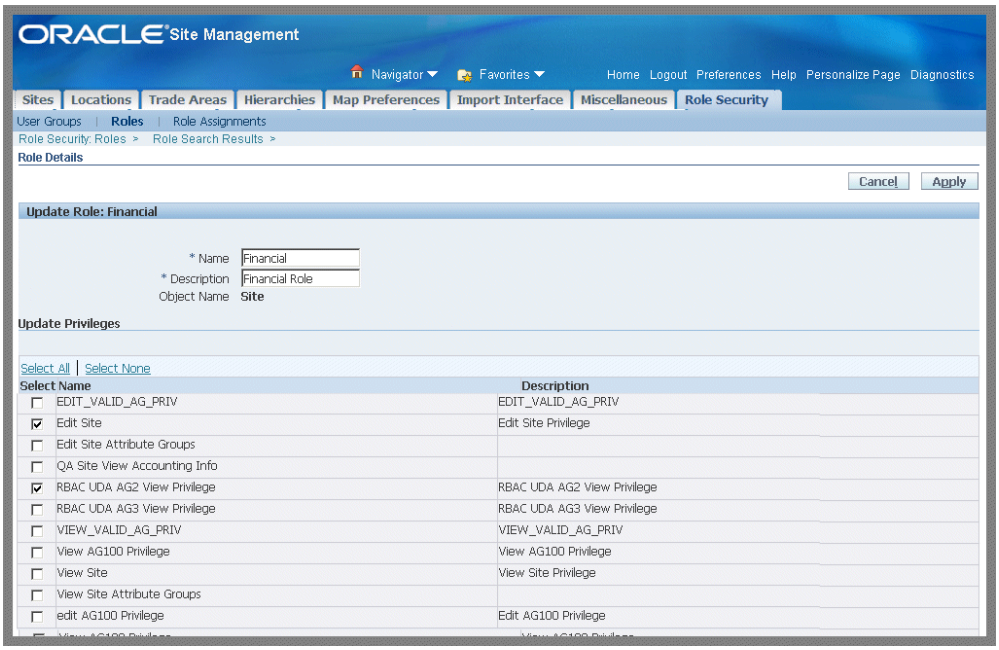
## To edit a user role:

1. On the Roles Details page, select Update to edit this role record.

   **Note:** The two seeded roles, Site Author and Hierarchy Author, cannot be deleted or updated.




2. The Update Role page appears and enables you to change the Name and Description values. Add or delete privileges by marking or deselecting the appropriate check boxes.




3. Select Apply to save your work.

## Viewing and Assigning Roles

Role assignments are granted to users or user groups in the context of defining security for that data object. Role assignment is the final step towards defining which users have access to what objects (site or hierarchy), what roles (a group of privilege), and at what level (one specific object or objects meeting a certain criteria).

By grouping privileges into roles, users can be assigned multiple roles which cumulatively describe the functions for the job. For example, a Facilities Manager may have privileges to edit site data, view and edit property/leases, view asset data - but not to create asset data.

The profile options RRS:Auto Assign Site Author Role and RRS:Auto Assign Hierarchy Author Role are used to grant View and Edit privileges. This profile option is usually set to a value of Yes at Site level, unless there is a need to tightly control View and Edit access of sites. See: Profile Options, page 2-6

Based upon your site and hierarchy setups and data values, role assignments may seem to conflict. Understanding your data and defining role assignments is an important aspect of controlling data access. For example:

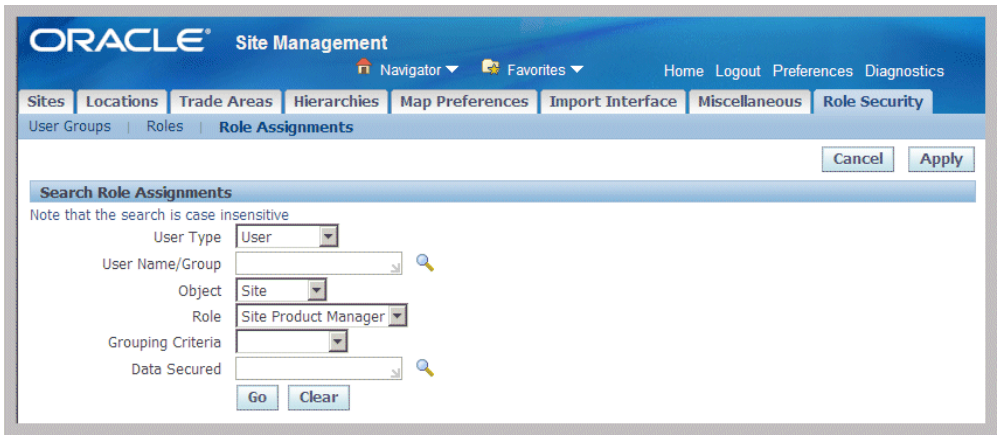
- You may have a role assignment defined that allows a user to view sites of a specific brand.
- The same user has another role assignment that allows him to view all active sites.

The second role assignment grants access to all active sites, irrespective of the site brand, potentially conflicting with the first role assignment where want to restrict access to sites of other brands. As long as any of the role assignments grant access to a user for a site or hierarchy, the user will have access to those objects.

### To search and view role assignments:

1. Navigate to the Role Assignments page.

   All existing role assignments appear on the page. You can filter the output by selecting search criteria in the Search Role Assignments region.




2. Optionally choose the following values for your search:

   - User Type

     Choices are User or User Group. You can select an individual user or the user

group role which includes the members.

- User Name/Group

  If you selected User as the User Type, you have the option to select an individual. Or you can select a group name if the User Type is a User Group.

- Object

  Data object choices in Site Hub are either Hierarchy or Site.

- Role

  You can narrow your search by selecting a specific role.

- Grouping Criteria

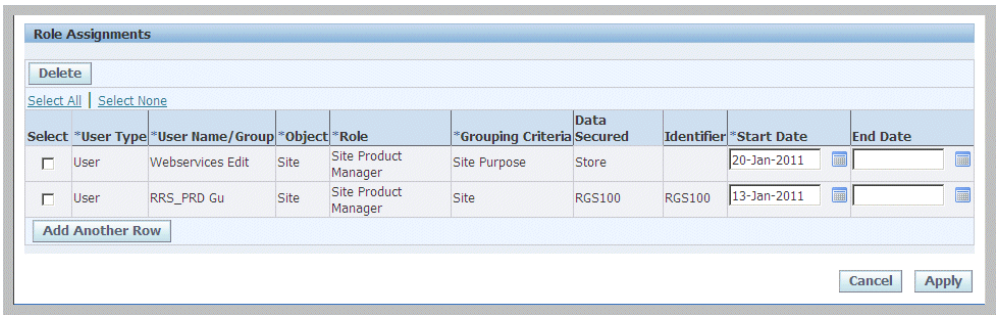
  Values for grouping criteria are for site objects are: All Sites, Site, Site Brand, Site Type, and Site Purpose.

  Values for grouping criteria for hierarchy objects are: All Hierarchies, Hierarchy, and Hierarchy Purpose.

- Data Secured

  Values are populated depending on the Grouping Criteria.

3. Select Go to see the results of your search.




### To delete role assignment records:

1. In the Role Assignments region of the Role Assignments page, choose the records you want to remove in the Select check box.

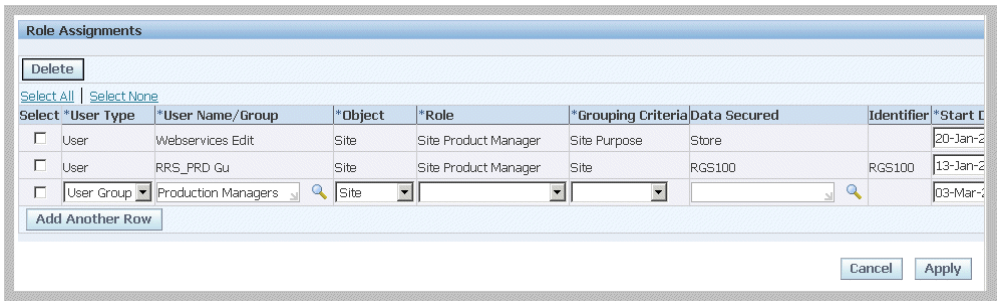
2. Select Delete.

3. Select Apply to save your work.

### To assign roles to users or user groups:

1. In the Role Assignments region of the Role Assignments page, select Add Another Row.

2. In the User Type field, choose an individual user or the user group role which includes the members. Values are User or User Group.




3. In the User Name/Group field, if you selected User as the User Type, you have the option to select an individual. If the User Type is a User Group, select a User Group value.

4. Select a data Object, choices are either Hierarchy or Site.

5. Select a value in the Role field.

6. Select a value in the Grouping Criteria field.
   - Seeded values for grouping criteria available for site objects:
     - All Sites—role assignment is applicable to all sites.
     - Site—role assignment is applicable to a specific site.
     - Site Brand
     - Site Type
     - Site Purpose
   - The seeded values for grouping criteria available for hierarchy objects:
     - All Hierarchies
     - Hierarchy
     - Hierarchy Purpose

7. In the Data Secured field, select a value. Available Data Secured values are determined depending on the value in the Grouping Criteria field.

   For example:

   - View Site and Edit Site privileges are given to user Jonathan Smith, for all the sites with a site purpose of Distribution Facility.
   - If you chose the Site Purpose value, the value available in the Data Secured field is Distribution Facility for user Jonathan Smith.

     **Note:** The associated Identifier value appears if the Grouping Criteria value selected is Site. The identifier value will always be Site Number; all other Grouping Criteria values do not have an Identifier value.

8. If this assignment is granted for a definite time period, enter the applicable date range definitions in the Start Date and End Date fields.

9. Select Apply to save your work.

# 4

# Site Hub Administrator

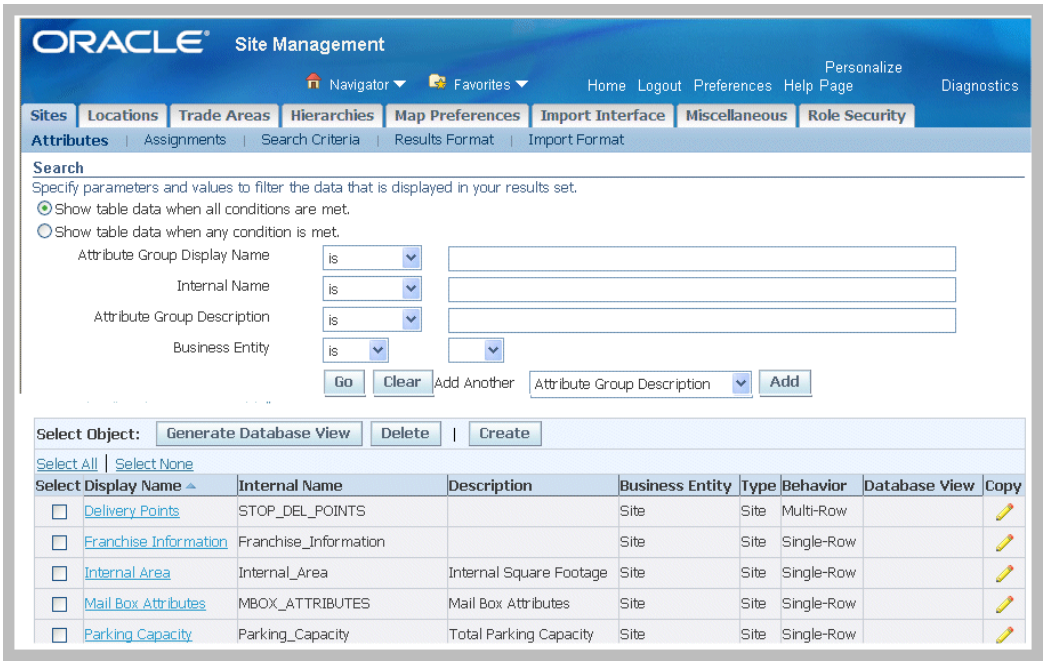
This chapter covers the following topics:

- Overview of Administrator Role
- Site Attributes
- Viewing and Creating Site Attribute Assignments
- Creating Attributes
- Location Attributes
- Viewing and Creating Location Attribute Assignments
- Viewing and Creating Trade Area Groups
- Trade Area Group Attribute Groups
- Viewing and Creating Trade Area Group Attribute Assignments
- Hierarchy Attributes
- Viewing and Creating Hierarchy Attribute Assignments
- Creating Hierarchy Attribute Pages
- Viewing and Defining Hierarchy Display Settings
- Defining Hierarchy Relationship Rules
- Setting Up Search Functions
- Setting Import Formats
- Using the Import Interface
- Associating Value Sets to Attributes
- Viewing and Creating User Defined Functions

## Overview of Administrator Role

The Site Hub Administrator contains tabbed regions for search and setup of attribute groups, map preference, value sets, and role security. There is also an import interface and you can generate a database view of third party system data integrated with your site data.

Search site criteria and results formats are defined in this role to help users search for sites. You can also define import formats for new site creation.




The tabbed regions enable you set the following features:

**Sites**, page 4-5

- View, create, and update site attributes and assignments
- Predefine search criteria information to personalize common searches
- Customize the format display of search results
- Select a site import format for downloading and uploading information for site creation using Microsoft Excel

**Locations**, page 4-20

- View, create, and update location attributes and assignments

**Trade Areas**, page 4-29

- View, create, and update trade area definitions
- Search and create trade area attributes and assignments

**Hierarchies**, page 4-39

- View, create, and update hierarchy attributes and assignments
- Predefine search criteria information to personalize common searches
- Customize the format display of search results
- Setup relationship rules for organizations and sites in the hierarchy
- Setup icons for sites and nodes displayed in the hierarchy and associate attribute pages

**Map Preferences**, page 6-2

- Set map image icons and window information
- Use the Geocoder program, page 6-6

**Import Interface**, page 4-62

- Ability to carry out high speed site data import for large data sets

**Miscellaneous for Value Sets**, page 4-62 and **Functions**, page 4-65

- Associate value sets with attributes
- Create new value set records
- View and create user defined functions

**Role Security**, page 3-1

- Control security according to roles in the organization
- Set privileges and group attributes within the appropriate sites

## Site, Location, Trade Area, and Hierarchy Attributes

Attributes associated to a site can capture functional areas including business characteristics, physical characteristics, financial information, and competitive information. In order to capture relevant site data for your business needs, you can define an unlimited number of attribute groups. Each attribute group can store up to 40 character, 20 numeric and 10 date attributes.

Sites may have similar attributes such as a collection of stores or branches that are similar in size, merchandise, or services offered. Site Hub provides the following

features for attributes:

- A comprehensive list of attributes can be defined for segments of industries, designated as Purposes in Site Hub. For example, in the retail industry—site purposes can include department stores, specialty stores, supermarkets, convenience stores, and chain drug stores.
- You can define and use unlimited number of attribute groups for a site.
- Ability to define custom attributes specific to your business requirements.
- Ability to use attributes from third party external applications.
- Grouping of attributes based on business functions.
- Ability to create attribute pages for ease of data entry and viewing of attributes.
- When searching for sites—search criteria enables you to search based on specific attribute values. For example, in the Advanced Search function, you can use several criteria to select one or more attributes by using keywords or the list of values to return focused search results.

### Attribute Pages

An attribute page is a view used to view, create, and edit different attributes from the various attribute group categories. An attribute page is a way of categorizing attribute groups and displaying them separately in these categories based on different functional areas, and therefore can contain one or many attribute groups. You can create attribute pages for each site, location, and trade area group entity; and assign corresponding attribute groups to these pages.

- Sites: Attribute pages can be created for the various site purposes, see: Creating Site Attribute Pages, page 4-16
- Locations: Attribute pages can be created for each country, and you can also assign multiple attribute pages to a specific country, see: Creating Location Attribute Pages, page 4-27
- Trade Areas: Attribute pages can be created for various trade area groups, and you can assign multiple pages to a single trade area group, see: Creating Trade Area Attribute Pages, page 4-38
- Hierarchies: Attribute pages can be created for various hierarchies, and you can assign multiple pages to a single hierarchy attribute group, see: Creating Hierarchy Attribute Pages, page 4-49

### Generating Database Views

You can generate a database view for reading user-defined attribute data with third

party systems.

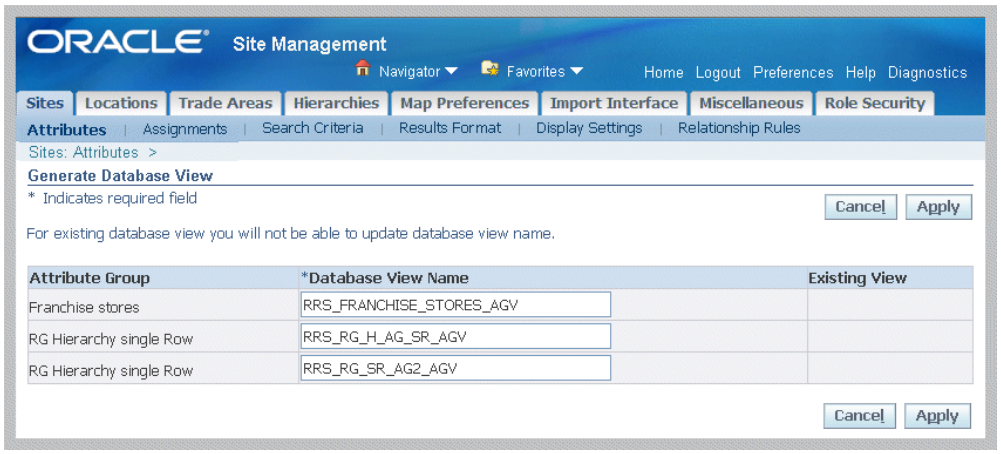
### To generate database views:

1. Navigate to the Attributes region of the Sites, Locations, or Hierarchies tabbed region of the Administrator.

2. Select the attribute groups you want included in your database view.

3. Select Generate Database View to display the Generate Database View page.

4. You have the option to change the value in the Database View Name field if this attribute group was not included in an existing database view.




5. Select Apply to save your work.

   The new database views appear on the search results table.

### Related Topics


Searching for Information, page 5-3

Setting Up Search Functions, page 4-55

Site Attributes, page 4-6

Location Attributes, page 4-20

Viewing and Creating Trade Areas, page 4-29


## Site Attributes

Site attributes are characteristics of sites and are defined by their names and values, and saved within attribute groups. You can reuse the same attribute group across different sites. An unlimited number of attribute groups can be defined. Third party system data

can be integrated, and you can generate a database view of existing attributes by selecting Generate Database View.

The Sites tabbed region of the Site Administrator home page opens displaying existing site attribute groups—you can filter the display by using a combination values. The Sites tabbed region also provides access to pages to:

- Create and update site attributes
- Create and update site attribute assignments
- Personalize search criteria
- Manage display formats for search results
- Manage the exporting and importing of site data using the Import Format function

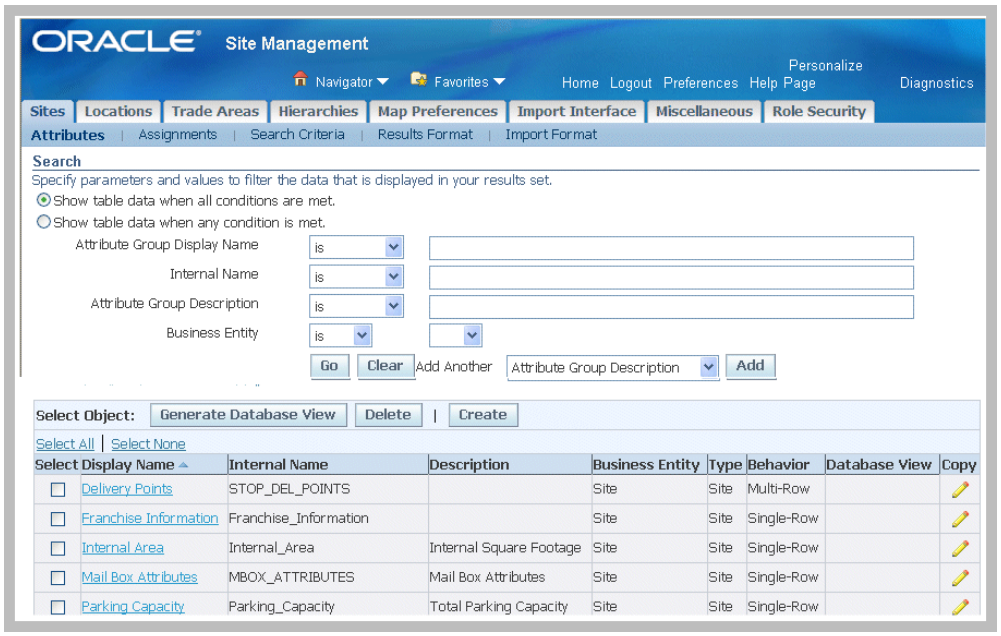
## Viewing, Creating, and Editing Site Attribute Groups

The Site Hub Administrator pages opens with all existing site attribute groups displayed.

### To view site attribute group details

1. Navigate the Sites tabbed region of the Administrator.
2. You can filter the display by using a combination of values including attribute group display and internal name, attribute group description, or business entity. See: Searching for Information, page 5-3

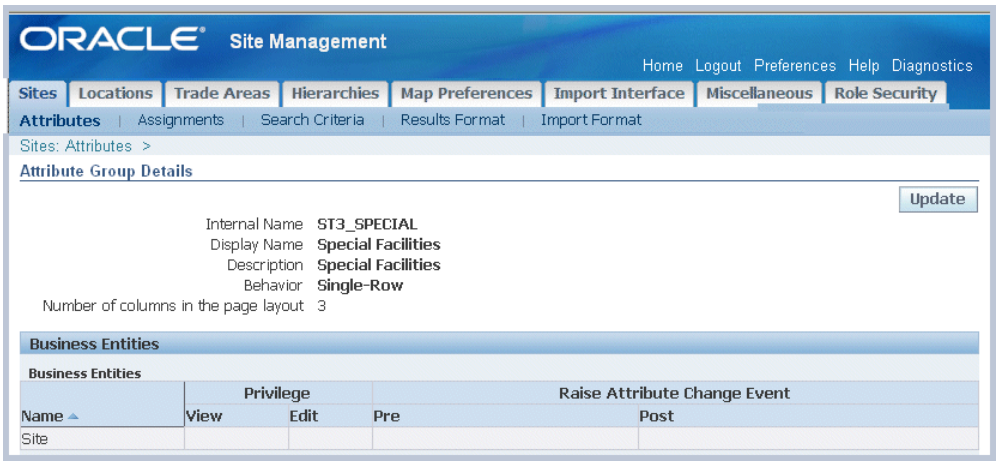
   The results region displays records in a tabular format with the following information: Display Name, Internal Name, Description, Business Entity, Type, Behavior, and Database View.

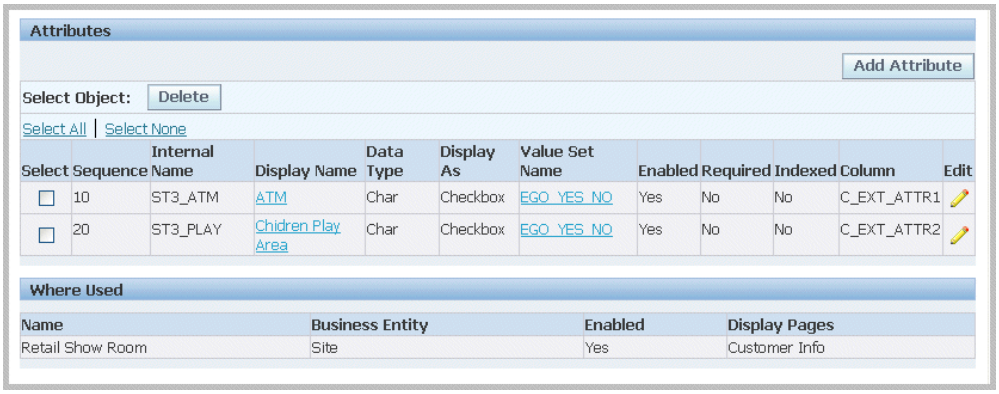



3. Select a record in the Display Name field to navigate to the Attribute Group Details page.

   This page displays information in the following fields for this attribute record:

   - Internal Name—internal name for the page
   - Display Name—name displayed on the page
   - Description—a description of the attribute category
   - Behavior:
     - Single-Row associates one attribute value with each attribute—that is, data is captured in a one-to-one relationship.
     - Multi-Row associates multiple sets of attribute values with the same attribute—that is, data is captured as a table of values.
   - Number of columns in the page layout—the number of columns to appear in the attribute group pages.
   - Number of rows in the page layout—the number of rows to appear in the attribute group pages. This field only appears for multi-row attribute groups.




The Business Entities region lists business events compiled in the Oracle Integration Repository. This tool is shipped as part of Oracle E-Business Suite. Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who are granted the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.

4. This page enables you to select:

   - Update to navigate to the Edit Attribute Groups for Site page to make changes.

   - Maintain Unique Key to navigate to the Maintain Unique Key page for this attribute group. This function applies only to multi-row attributes. A unique key is any set of attributes whose values can be used to uniquely identify a row within the attribute group. See: Defining Item Attributes and Attribute Groups, *Oracle Product Information Management Implementation Guide*

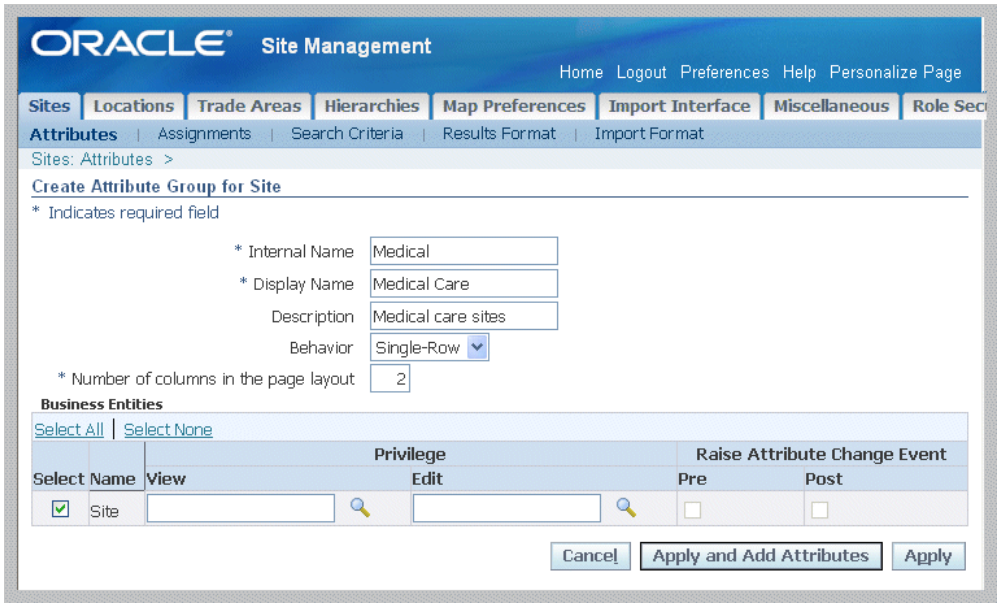
   - Add Attribute to navigate to the Create Attribute page to create new attribute records. See: Creating Attributes, page 4-18

### To create an attribute group for a site:

1. Navigate the Sites tabbed region of the Administrator, select Create to display the Create Attribute Group for Site page.

2. Enter a value in the Internal Name field; and the name you want displayed on the page in the Display Name field. The Internal Name value cannot be updated once a record has been created.

3. Optionally in the Description field, you can enter a description of the attribute category.




4. Select a value in the Behavior field:

   - Single-Row associates one attribute value with each attribute

   - Multi-Row associates multiple sets of attribute values with the same attribute

5. Enter a value in the Number of columns in the page layout. This is the number of columns to appear in the attribute group pages. The default value is 2.

6. If you selected Multi-Row a the value in the Behavior field, you can select a value in the Number of rows in the page layout field. This is the number of rows to appear in the attribute group pages. The default value is 5.

   The Business Entities region lists business events compiled in the Oracle Integration Repository. This tool is shipped as part of Oracle E-Business Suite. Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who are

granted the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.

7. Select Apply to save your work. Or select Apply And Add Attributes to save and add attributes to this record. See: Creating Attributes, page 4-18

### To create a site attribute group by copying an existing record:

1. Navigate the Sites tabbed region of the Administrator, select the record you want to copy in the results region, and choose Copy.

   The Create Attribute Group for Site page displays with some values from the original record.

2. Enter a unique value in the Internal name field. This value cannot be updated once a record has been created.

3. You have the option to select new values in the Display Name and Description fields

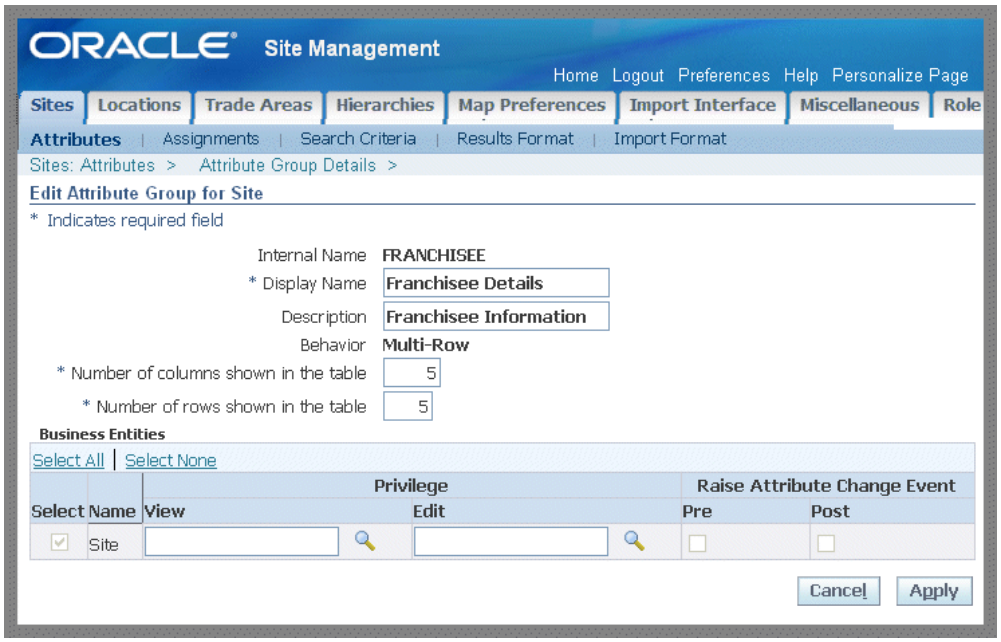
   You cannot change the Behavior value, but you can change the values in the Number of columns and Number of rows fields.

4. Select Apply to save your work.

### To edit a site attribute group record:

1. Select an attribute group record navigate to the Attribute Group Details page.

2. Select Update to display the Edit Attribute Group for Site page.




3. You have the option to change the values in the following fields:

   **Note:** The Internal Name and Behavior type fields cannot be updated once an attribute group has been created.

- Display Name
- Description
- Single-Row Behavior
  - Number of columns in the page layout—the number of columns to appear in the attribute group pages
- Multi-Row Behavior
  - Number of columns shown in the table—the number of columns to appear in the attribute group pages.
  - Number of rows shown in the table—the number of columns to appear in the attribute group pages.

The Business Entities region lists business events compiled in the Oracle Integration Repository. This tool is shipped as part of Oracle E-Business Suite. Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who are granted the Integration Developer role or the Integration Administrator role can

access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.

4. Select Apply to save your work.

### Related Topics

Searching for Information, page 5-3

Setting Up Search Functions, page 4-55

Defining Item Attributes and Attribute Groups, *Oracle Product Information Management Implementation Guide*

Copying Attribute Groups, page 5-34

Creating Attributes, page 4-18

## Viewing and Creating Site Attribute Assignments

Attributes define the characteristics of the site, and purposes specify the function used for the site. Assigning an attribute group to a site purpose is an important step for viewing and editing associated attributes for sites with corresponding purposes.

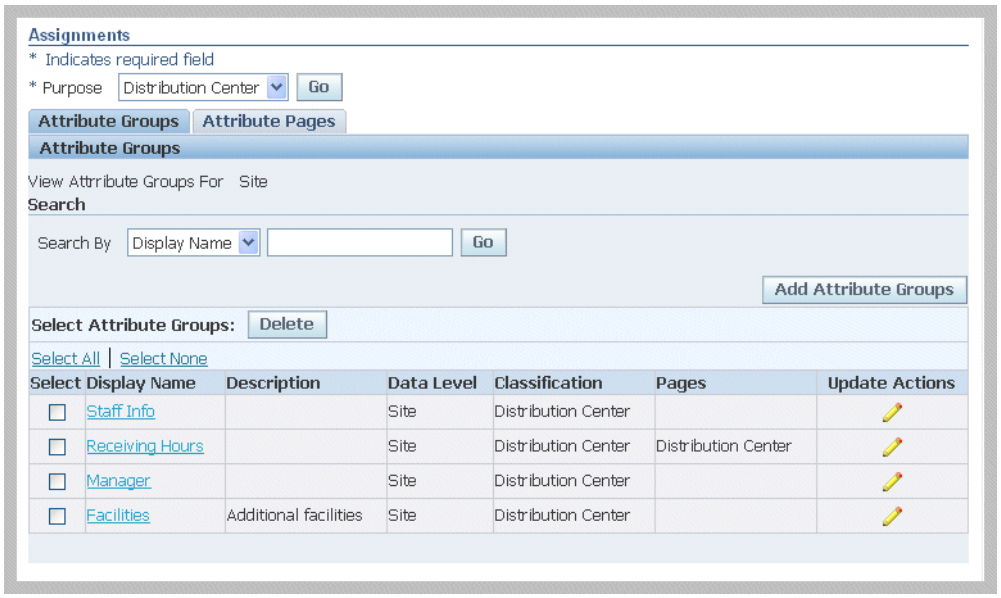
See: Site Attributes, page 4-5

#### To add attribute groups to site purpose:

1. In the Sites tabbed region of the Administrator, select Assignments.

2. In the Assignments page, select a value in the Purpose field, and select Go.

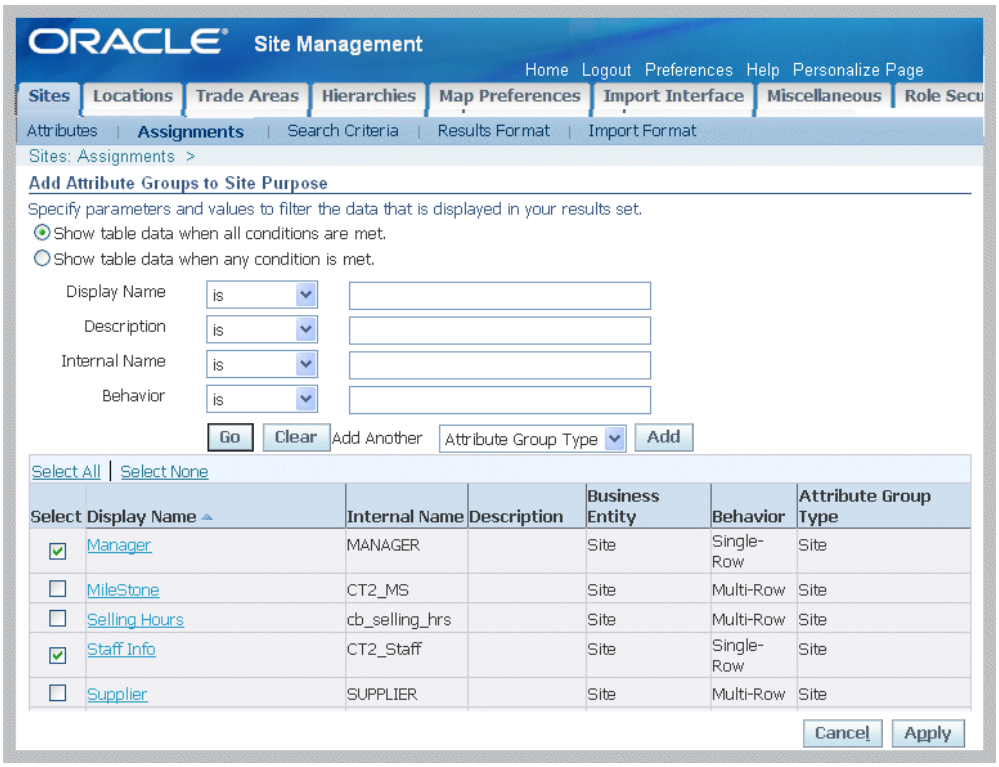
   All the attribute groups assigned to this site purpose display in the results table.




3. In the Attribute Groups tabbed region, select Add Attribute Groups to display the Add Attribute Groups to Site Purpose page.

   You can filter the display by using a combination of attribute group Display Name Description, Internal Name, and Behavior. Or you can select Add to add other search parameters, see: Searching for Information, page 5-3

4. In the results region, select the records you want to add to this site purpose.




5. Select Apply. The new records appear on the Assignments page.

### To view and update site attribute group assignments:

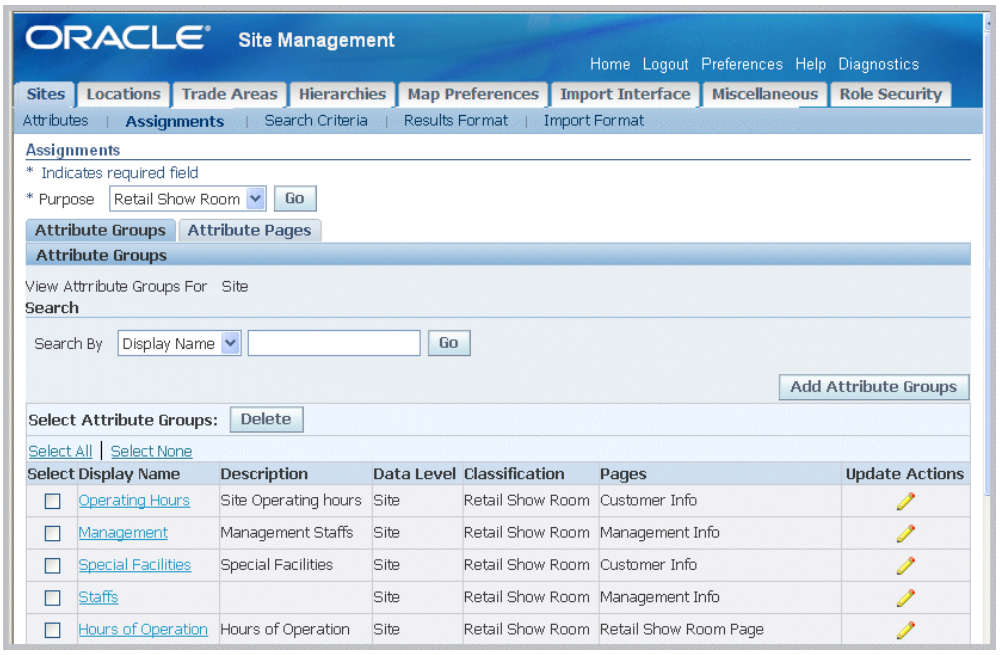
1. Navigate to the Sites Assignments page.

2. Choose a value in the Purpose field, and select Go to display the attribute assignments for that purpose.

   Records display in a table. You can view details in the Attribute Groups or Attribute Pages tabbed regions.

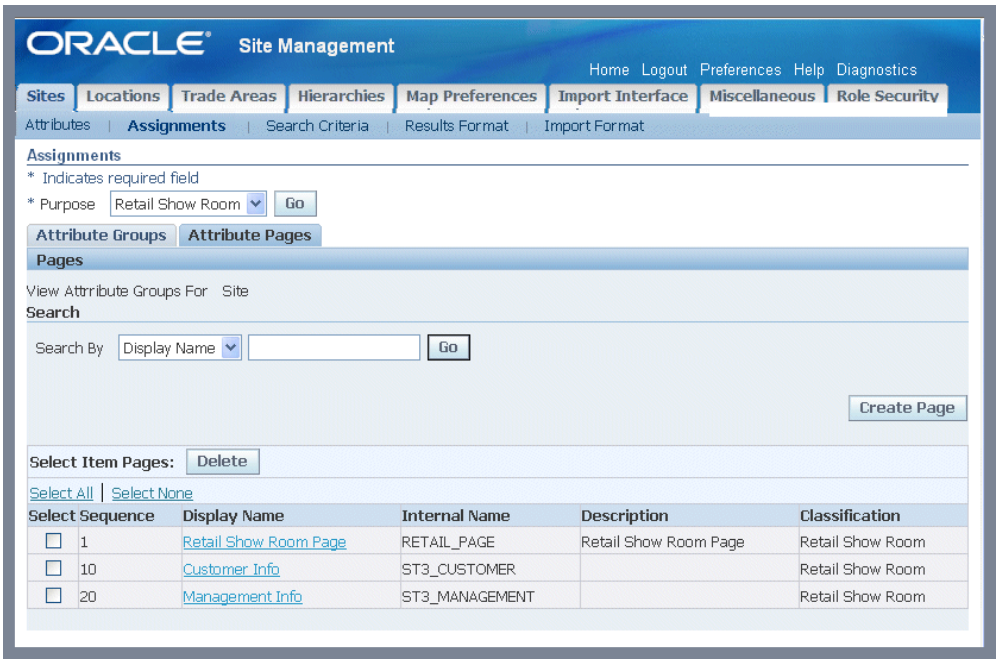
   - The Attributes Group tab displays all the assignments for the purpose selected

   - The Attribute Pages tab displays all the pages defined for the purpose selected




3. Select Add Attribute Groups if you want to add attributes to specific site purpose records. See: Viewing and Creating Site Attribute Assignments, page 4-12

4. Select Update Action to navigate to the Actions page. See: Adding Actions to an Attribute Group, *Oracle Product Information Management Implementation Guide*




5. In the Attribute Pages tab, select a record to display the Attribute Group Details page. See: Viewing, Creating, and Editing Site Attribute Groups, page 4-6

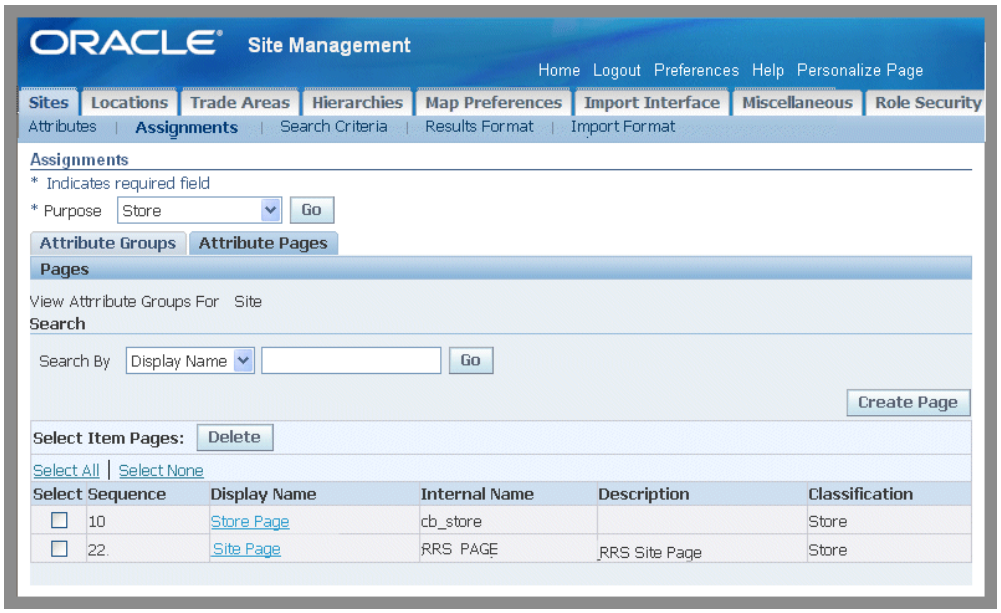
## Creating Site Attribute Pages

Site attribute pages are created for the various site purposes, and assigned attribute groups for ease of data entry and viewing. For each page, you can choose the attributes displayed and the specific order they are listed. You can also assign multiple attribute pages to a single site purpose.

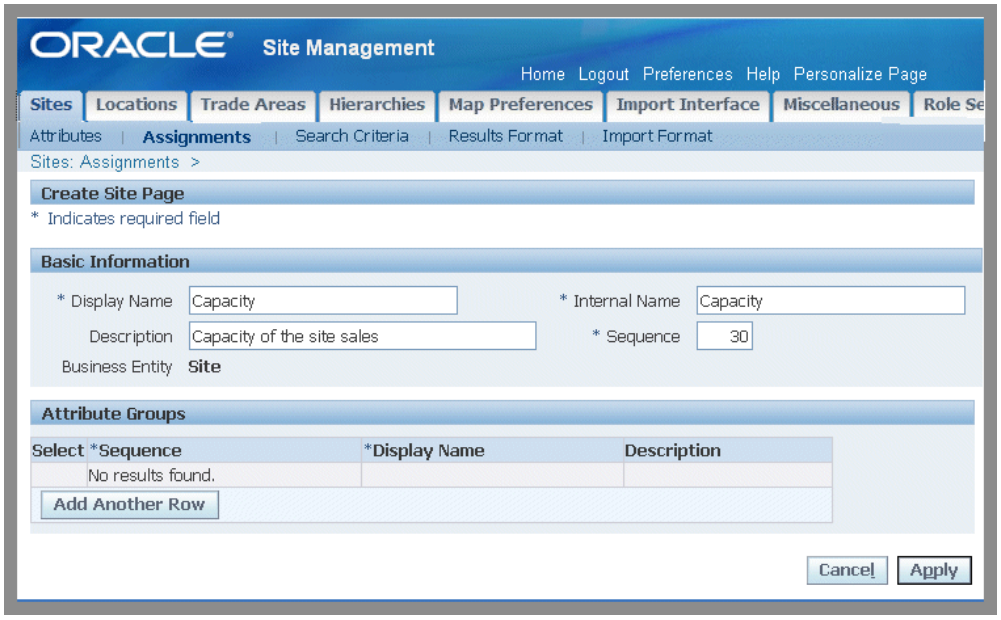
### To create site attribute pages:

1. In the Sites tabbed region of the Administrator, select Assignments.

2. Select a value in the Site Purpose field, and select Go.




3. Select the Attribute Pages tab, and in the Pages region select Create Page.




4. In the Create Site Page region, create an attribute page for the site purpose by entering data in the Basic Information region:

   - Display Name—name displayed on the page
   - Description—a description of the attribute category

- Internal Name—internal name for the page, this value cannot be updated once a page has been created
- Sequence—sequence number for each page associated with an attribute group, the sequence number determines the order pages are listed

5. In the Attribute Groups region, select Add Another Row to add attributes groups to this page. To add an existing attribute group:
   - Enter a Sequence number
   - Select an existing Display Name value
6. Select Apply to save your work.

   The attributes for this purpose, and the display sequence appear in the Pages region.

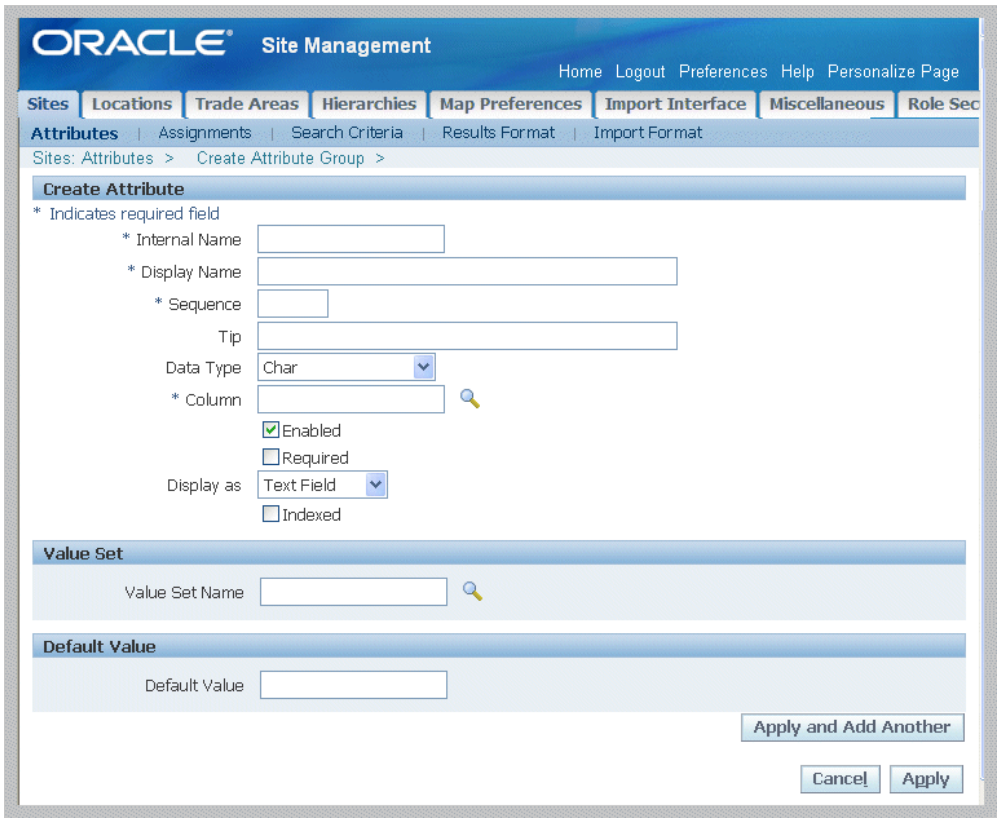
## Creating Attributes

Attributes are characteristics of sites and defined by their names and values. Site Hub provides seeded attributes, and you can create customized attributes specific to your business requirements.

### To create an attribute:

1. Navigate to the Create Attribute page.

   For a detailed explanation of the fields, see: Defining Item Attributes and Attribute Groups, *Oracle Product Information Management Implementation Guide*




2. Enter values in the required fields:

   - Internal Name—internal name for the page, this value cannot be updated once a page has been created

   - Display Name—name displayed on the page

   - Sequence—number used to determine the order listed of the attribute when creating attribute pages

3. Optionally, you can enter a value in the Tip field; this is another description of the attribute that appears on pages.

4. Select a value in the Data Type field.

   The data type that you select determines the values that are available in the Column, Value Set, and Display As fields. Your options are Char (character), Number, Standard Date, Standard Date Time, and Translatable Text.

5. Select a value in the Column field.

   This data is used to specify the column name where the attribute is stored in the database table, for example, N_EXT_ATTR1. Available values are determined by

the value selected in the Data Type field.

6. You have the option to enable the Enable and Required check boxes:
   - Enabled—specifies if the attribute is available for use. If the attribute is enabled, specify whether or not the attribute is required or not.
   - Required—if required, you must use this attribute value when saving data for an object using the attribute group it is associated with.
7. Display As—determines how the attribute appears on the page. Available values are determined by the data type selected. Your choices are Text Field, Checkbox Dynamic URL, Hidden, Radio Group, Static URL, and Text Area.
8. Specify whether or not you want the attribute to be indexed. The Indexed check box is used with sort criteria templates; only indexed attributes are available as sort criteria in result formats.
9. In the Value Set region, optionally you can select a record that is used as a set of constraints for the attribute.

   Site Hub enables you to create user-defined attributes with validation logic to support the needs of your organization. See: Defining Value Sets for User-Defined Attributes, *Oracle Product Information Management Implementation Guide*
10. In the Default Value region, you can enter a default value for this attribute. If you've selected a value set, the value set's constraints apply to the default value.
11. Select Apply to save your work. Or select Apply and Add Another Attribute to save the record and create another one.

# Location Attributes

Sites are your place of business, and defined in the context of a country. The location of a site can be an actual or planned structure such as a building, town, occupied area—or any geographical place associated with trade purposes. Geographical places can also contain specific areas within them such as a spaces in a warehouse designated for a specific purpose. Global Location Numbers (GLN) provide a standard to identify legal entities and locations. You can use this identification for physical entities and locations such as a particular room in a building, warehouse, and room within a building.

## Viewing, Creating, and Editing Location Attribute Groups

The Locations tabbed region in the Administrator displays all existing site location attribute groups. Third party system data can be integrated, and you can generate a database view of all attributes. This region also provides access to pages to view, create, and update location attribute assignments.

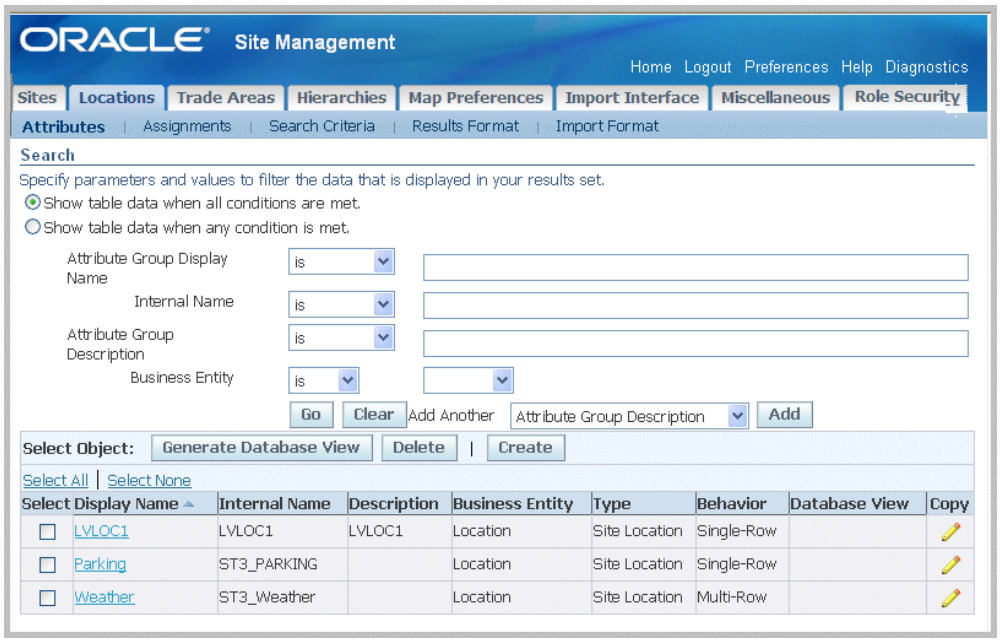
**Note:** Location attributes and attribute pages are required to be associated to a country for site data entry.

### To view location attribute group details

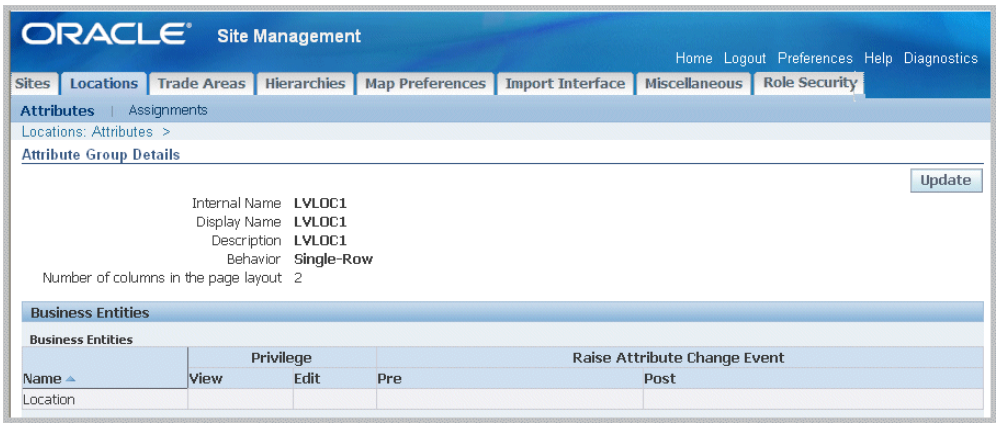
1. Navigate to the Locations tabbed region of the Administrator.

   You can filter the display by using a combination of attribute group display and internal name, attribute group description, or business entity. See: Searching for Information, page 5-3

   The results region displays records in a tabular format with the following information: Display Name, Internal Name, Description, Business Entity, Type, Behavior, Database View.

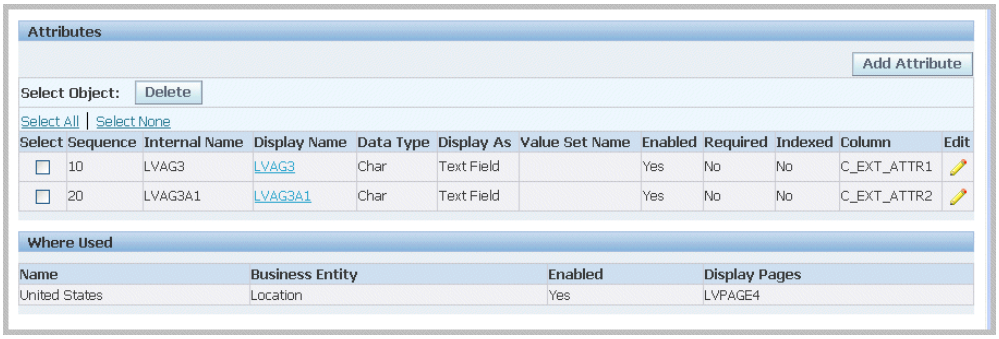



2. Select a record to display the Attribute Group Details page.




This page displays information in the following fields for this attribute record:

- Internal Name—internal name for the page
- Display Name—name displayed on the page
- Description—a description of the attribute category
- Behavior—Single-Row or Multi-Row




3. This page enables you to select:
   - Update to navigate to the Edit Attribute Groups for Site Location page to make changes.
   - Maintain Unique Key to navigate to the Maintain Unique Key page for this attribute group. This function applies only to multi-row attributes. A unique key is any set of attributes whose values can be used to uniquely identify a row within the attribute group. See: Defining Item Attributes and Attribute Groups, *Oracle Product Information Management Implementation Guide*
   - Add Attribute to navigate to the Create Attribute page to create new location attribute records. See: Creating Attributes, page 4-18

### To create an attribute group for a location

1. Navigate the Locations tabbed region of the Administrator, select Create to display the Create Attribute Group for Location page.

2. Enter a value in the Internal Name field; and the name you want displayed on the page in the Display Name field. The Internal Name value cannot be updated once a record has been created.

3. Optionally in the Description field, you can enter a description of the attribute category.

4. Select a value in the Behavior field:

   - Single-Row associates one attribute value with each attribute

   - Multi-Row associates multiple sets of attribute values with the same attribute

5. Enter a value in the Number of columns in the page layout. This is the number of columns to appear in the attribute group pages. The default value is 2.

6. If you selected Multi-Row a the value in the Behavior field, you can select a value in the Number of rows in the page layout field. This is the number of rows to appear in the attribute group pages. The default value is 5.

   The Business Entities region lists business events compiled in the Oracle Integration Repository. This tool is shipped as part of Oracle E-Business Suite. Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who are granted the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.

7. Select Apply to save your work. Or select Apply And Add Attributes to save and add attributes to this record. See: Creating Attributes, page 4-18

### To create a location attribute group by copying an existing record

1. Navigate the Location tabbed region of the Administrator, select the record you want to copy in the results region, and choose Copy.

   The Create Attribute Group for Location page displays with the values from the original record.

2. Enter a unique value in the Internal name field. This value cannot be updated once a record has been created.

3. You have the option to select new values in the Display Name and Description fields

You cannot change the Behavior value, but you can change the values in the Number of columns and Number of rows fields.

4. Select Apply to save your work.

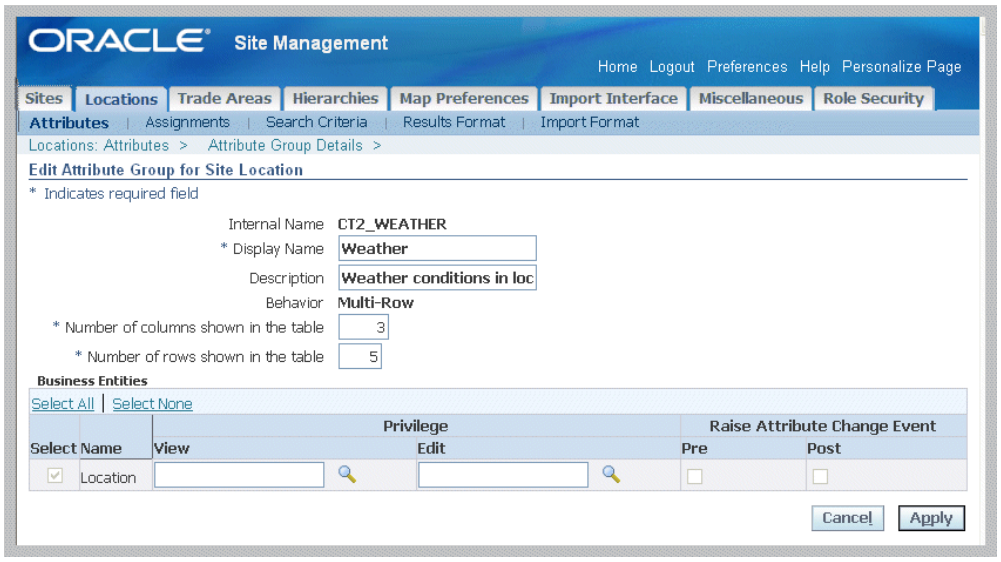
### To edit a location attribute group record

1. Navigate to the Edit Attribute Groups for Site Location page.

2. You have the option to update the following fields.

   **Note:** The Internal Name and Behavior type fields cannot be updated once an attribute group has been created.

   - Display Name
   - Description
   - Single-Row Behavior
     - Number of columns in the page layout—the number of columns to appear in the attribute group pages
   - Multi-Row Behavior
     - Number of columns shown in the table—the number of columns to appear in the attribute group pages.
     - Number of rows shown in the table—the number of columns to appear in the attribute group pages.




The Business Entities region lists business events compiled in the Oracle Integration Repository. This tool is shipped as part of Oracle E-Business Suite. Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who are granted the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.

3. Select Apply to save your work.

## Viewing and Creating Location Attribute Assignments

Location attributes capture characteristics of the geographical place associated in the context of a country. Assigning a location attribute group to a country is an important step for viewing and editing associated locations. It is also a required step if you are creating location attribute pages.

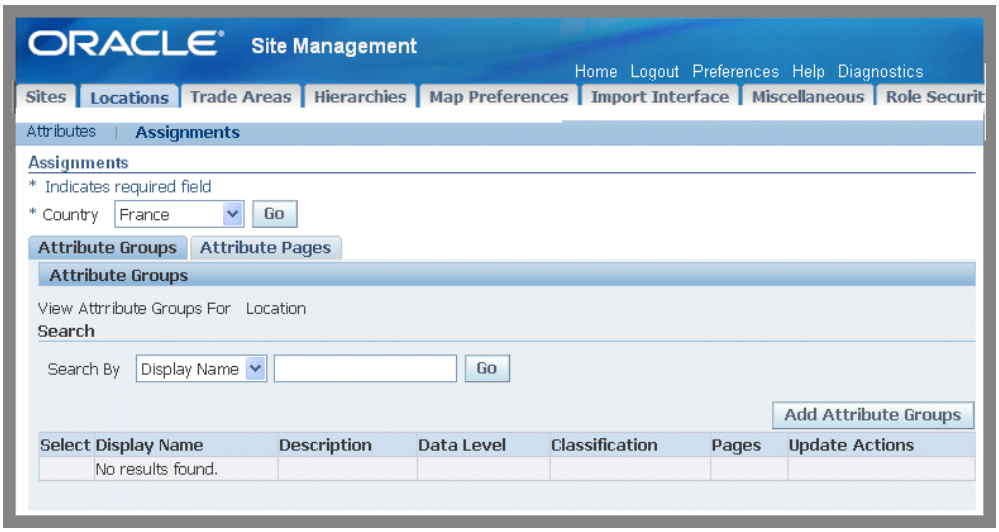
See: Location Attributes, page 4-20

### To add attribute groups to a country location:

1. In the Locations tabbed region of the Administrator, select Assignments to display the Assignments page.

2. Choose a value in the Country field, and select Go.

   Countries already assigned to this location display in the Attribute Groups tabbed region.




3. Select the Attribute Groups tabbed region, and select Add Attribute Groups to display the Add Attribute Groups to Country page.

   You can filter the display by using a combination of attribute group display and internal name, attribute group description, or business entity. See: Searching for Information, page 5-3

4. In the results region, select the records you want to this country.

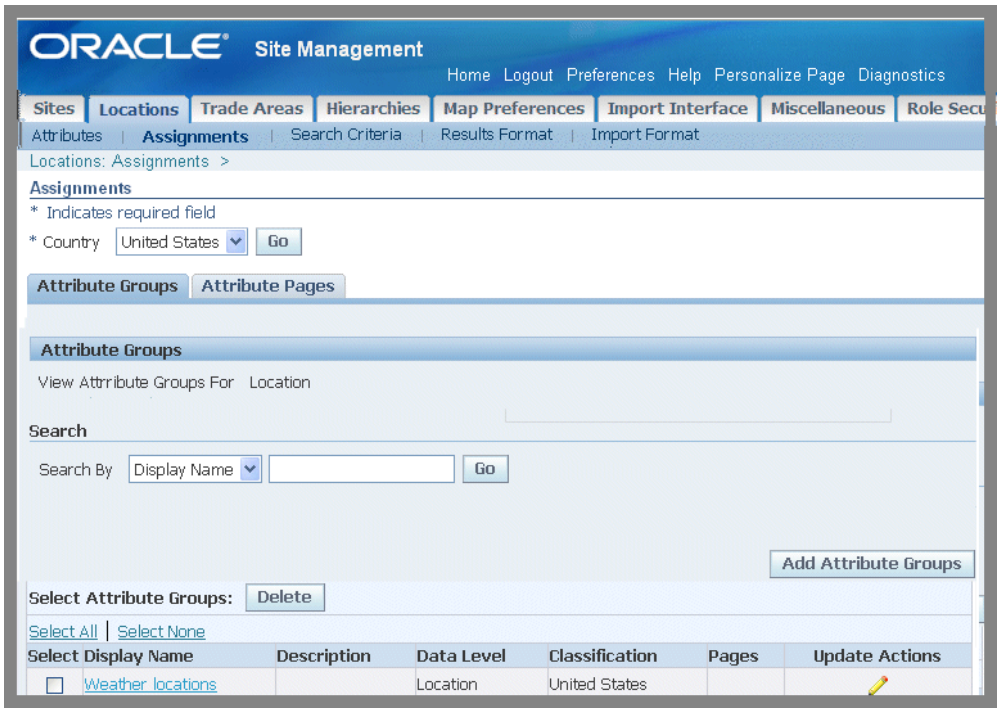
5. Select Apply. The new records appear on the Assignments page.

### To view and update location attribute assignments:

1. In the Locations tabbed region of the Administrator, select Assignments to display the Assignments page.

2. Choose a value in the Country field, and select Go to display the attribute assignments for that country location.

   Records display in a table. You can view assignment details in the Attribute Groups or Attribute Pages tabbed regions.




3. Select Add Attribute Groups if you want to add attributes to specific country records.

4. Select a record to display the Attribute Group Details page. See: Location Attributes, page 4-20

5. Select Update Actions to navigate to the Actions page, see: Adding Actions to an Attribute Group, *Oracle Product Information Management Implementation Guide*

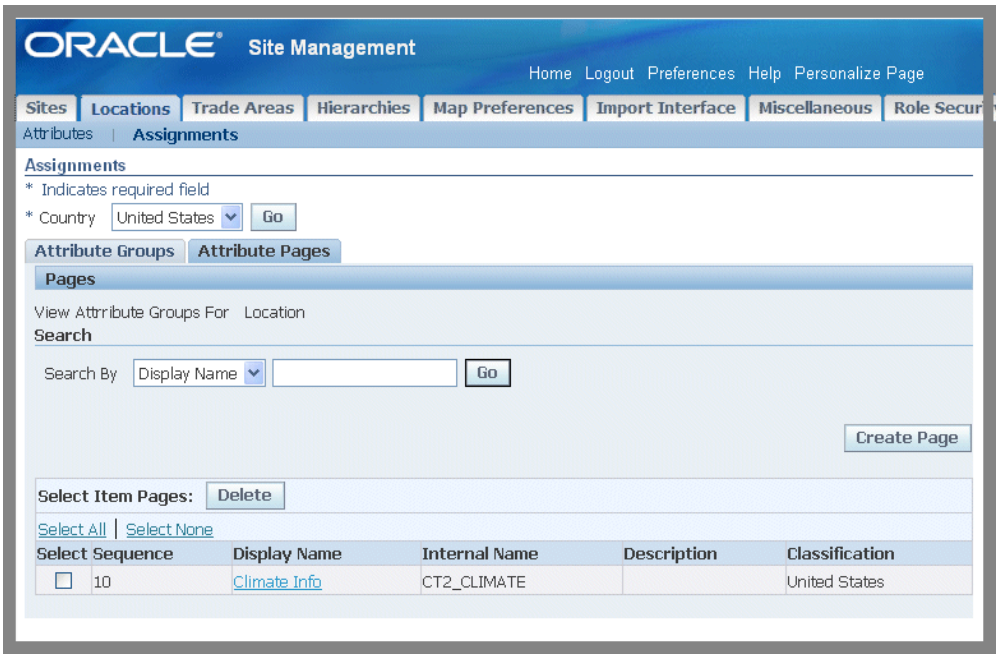
## Creating Location Attribute Pages

Attribute pages can be created for each country record for ease of data entry and viewing. You can assign multiple attribute pages to a specific country. For each page, you choose the attributes displayed and the specific order they are listed.

### To create location attribute pages

1. Navigate to Assignments in the Locations tabbed region of the Administrator.

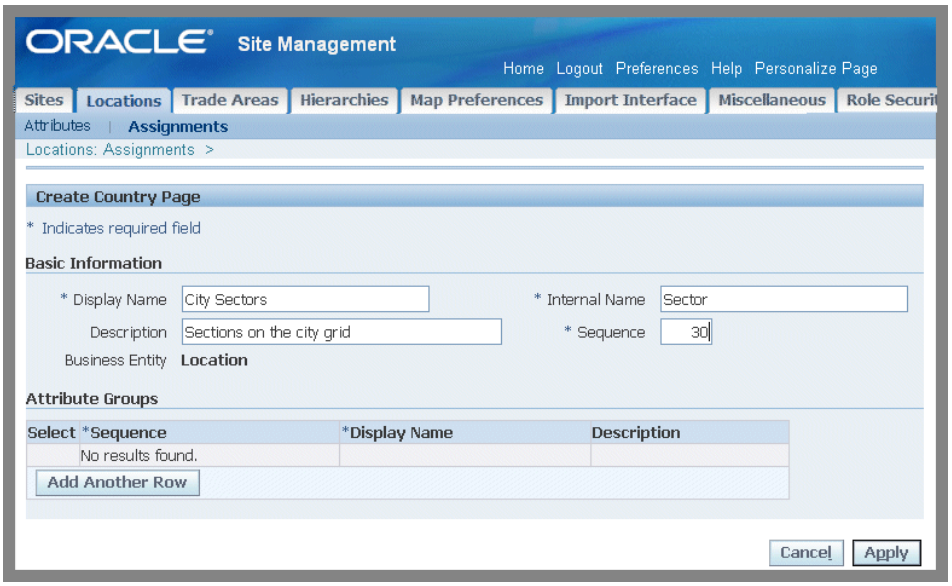
2. Select a value in the Country field, and select Go.




3. Select the Attribute Pages tab, and in the Pages region select Create Page.

4. In the Create Country Page, create an attribute page for the location by entering data in the Basic Information region:

   - Display Name—name displayed on the page.
   - Description—a description of the attribute category.
   - Internal Name—internal name for the page, this value cannot be updated once a page has been created.
   - Sequence—sequence number for each page associated with an attribute group, the sequence number determines the order on the pages.




5. Select the Attribute Groups tabbed region, and select Add Another Row to add attributes groups to this page. To add an existing attribute group:
   - Enter a Sequence number
   - Select an existing Display Name value

6. Select Apply to save your work.

   The attributes for this purpose, and the display sequence appear in the Pages region.

## Viewing and Creating Trade Area Groups

Site Hub provides trade area support by giving you the ability to define multiple trade area groups for each site. Trade area groups are used to define trade regions. They are used for site selection screening and market analysis—primary, secondary and tertiary trade areas are used in the site selection process. For example, the primary trade areas could be defined as the nearest source of customers, secondary as residential neighborhoods where customers live, and the tertiary trade area can consist of customers farther away. For each trade area you can:

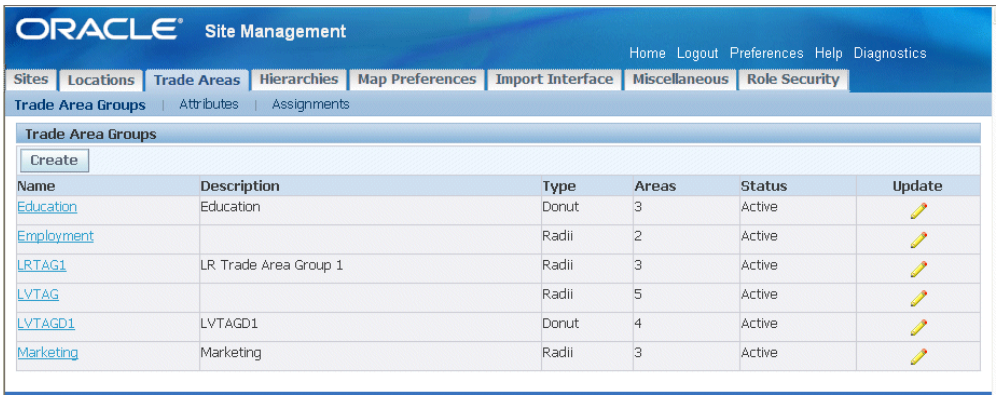
- Define up to 5 trade areas for each of your sites.
- Capture demographics in the attributes.
- Integrate with Google Maps providing visual comparison of trade areas and competitor sites.

A trade area group can be used for multiple sites, and one site can be associated to multiple trade area groups.

### To view trade area groups:

1. Navigate to the Trade Areas tabbed region the Administrator.

   Trade area groups are listed in a table with the following information: Name, Description, Type, Areas, and Status.




| Name | Description | Type | Areas | Status | Update |
|---|---|---|---|---|---|
| Education | Education | Donut | 3 | Active | |
| Employment | | Radii | 2 | Active | |
| LRTAG1 | LR Trade Area Group 1 | Radii | 3 | Active | |
| LVTAG | | Radii | 5 | Active | |
| LVTAGD1 | LVTAGD1 | Donut | 4 | Active | |
| Marketing | Marketing | Radii | 3 | Active | |

   This page enables you to select:

   - Create to create a new record
   - A name record to navigate to the View Trade Area Group detail page
   - Update to edit information

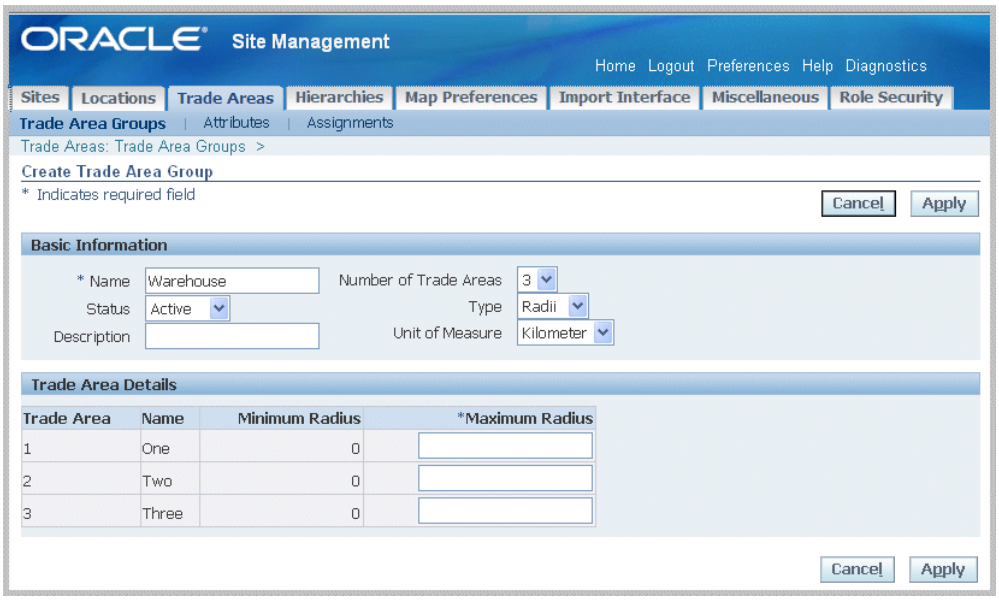
2. Select a trade area group record to display the View Trade Area Group detail page.

   In the Basic Information region, you can view the Name, Status, Description, Number of Trade Areas, Type, and Unit of Measure.


### To create a trade area group record:

1. Select Create to navigate to the Create Trade Area Group page.
2. In the Basic Information region, enter a unique value in the Name field.
3. In the Status field, set the value to Active.

   Trade area groups cannot be deleted if attributes have been associated to the record. You can set these records to the Inactive status if you no longer want to use them.




4. Select information in the following fields:
   - Description—optionally you can enter information to describe this trade area.
   - Number of Trade Areas—select the number of trade areas that use this group designation. You can define up to 5 trade areas.
   - Type:
     - Donut—a collection of concentric trade areas, each independent of it's inner or outer trade area. For example, the first trade area can be defined as 0 to 2 miles, the second trade area as 2 to 5 miles, and the third trade area 5 to 10 miles.
     - Radii—a collection of concentric trade areas, each inclusive of it's inner trade area. For example, The first trade area is defined as 0 to 2 miles, the second as 0 to 5 miles, and the third trade area as 5 to 10 miles.
   - Unit of Measure—used in mapping, Kilometers or Miles.
5. In the Trade Area Details region, set a Maximum Radius for each of the trade areas selected.
6. Select Apply to save your work.

### To update a trade area group:

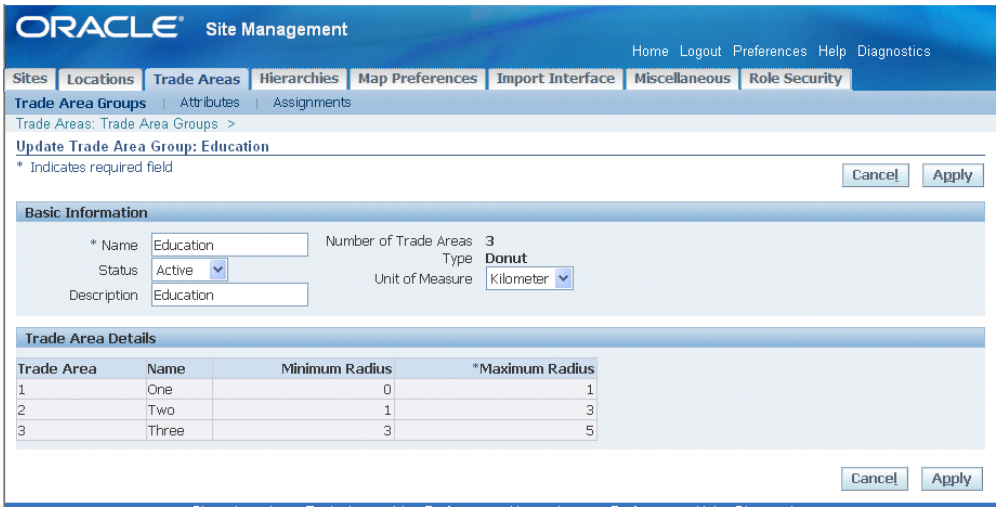
1. Select a trade area group record on the Trade Areas tabbed region of the

Administrator, and choose Update.

The Update Trade Area Group page appears.

2. Edit applicable information in the Name, Status, Description, and Unit of Measure fields.

   **Note:** The Number of Trade Areas and Type fields are not enabled for updates.




3. Select Apply to save your work.

# Trade Area Group Attribute Groups

Trade area group attributes provide the ability to define multiple trade areas for each site. You can:

- Capture demographics in the attributes.
- View a mapped comparison of trade areas and competitor sites.
- Represent different functional processes of a business such as marketing or advertising; different trade areas are represented as concentric circles around the site.

## Viewing, Creating, and Editing Trade Area Group Attribute Groups

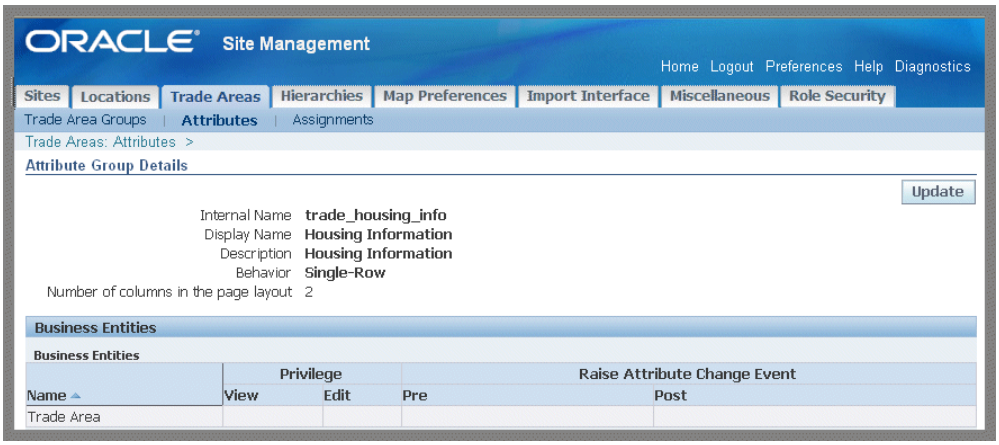
The Trade Area Group Attribute page opens with all existing records displaying.

### To view trade area group attribute group details:

1. Navigate to the Trade Areas tabbed region of the Administrator, and select Attributes.

2. You can filter the display by using a combination of values including attribute group display and internal name, attribute group description, or business entity. See: Searching for Information, page 5-3

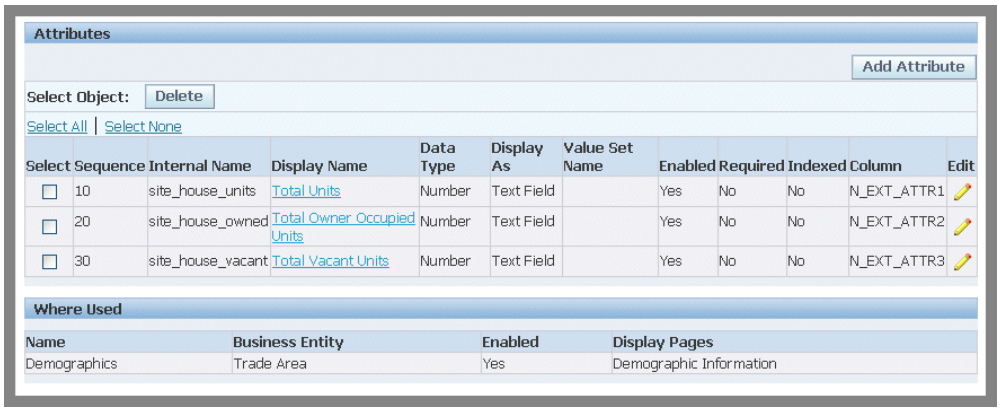
   The results region displays records in a tabular format with the following information: Display Name, Internal Name, Description, Business Entity, Type, Behavior, and Database View.




3. Select a record in the Display Name field to navigate to the Attribute Group Details page.

   This page displays information in the following fields for this attribute record:

   - Internal Name—internal name for the page
   - Display Name—name displayed on the page
   - Description—a description of the attribute category
   - Behavior—Single-Row or Multi-Row



Attributes

Add Attribute

Select Object: Delete

Select All | Select None

| Select | Sequence | Internal Name | Display Name | Data Type | Display As | Value Set Name | Enabled | Required | Indexed | Column | Edit |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | 10 | site_house_units | Total Units | Number | Text Field | | Yes | No | No | N_EXT_ATTR1 | |
| ☐ | 20 | site_house_owned | Total Owner Occupied Units | Number | Text Field | | Yes | No | No | N_EXT_ATTR2 | |
| ☐ | 30 | site_house_vacant | Total Vacant Units | Number | Text Field | | Yes | No | No | N_EXT_ATTR3 | |

Where Used

| Name | Business Entity | Enabled | Display Pages |
|---|---|---|---|
| Demographics | Trade Area | Yes | Demographic Information |

The Business Entities region lists business events compiled in the Oracle Integration Repository. This tool is shipped as part of Oracle E-Business Suite. Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who are granted the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.

4. This page enables you to:
   - Select Update to navigate to the Edit Attribute Groups for Trade Area Groups page to make changes.
   - Select Maintain Unique Key to navigate to the Maintain Unique Key page for this attribute group. This function applies only to multi-row attributes. A unique key is any set of attributes whose values can be used to uniquely identify a row within the attribute group. See: Defining Item Attributes and Attribute Groups, *Oracle Product Information Management Implementation Guide*
   - Select Add Attribute to navigate to the Create Attribute page to create new trade area attribute records. See: Creating Attributes, page 4-18

### To create an attribute group for a trade area group:

1. Navigate the Trade Areas tabbed region of the Administrator, select Create to display the Create Attribute Group for Trade Area Group page.
2. Enter a value in the Internal Name field; and the name you want displayed on the page in the Display Name field. The Internal Name value cannot be updated once a record has been created.
3. Optionally in the Description field, you can enter a description of the attribute category.

4. Select a value in the Behavior field:
   - Single-Row associates one attribute value with each attribute
   - Multi-Row associates multiple sets of attribute values with the same attribute
5. Enter a value in the Number of columns in the page layout. This is the number of columns to appear in the attribute group pages. The default value is 2.
6. If you selected Multi-Row as the value in the Behavior field, you can select a value in the Number of rows in the page layout field. This is the number of rows to appear in the attribute group pages. The default value is 5.

   The Business Entities region lists business events compiled in the Oracle Integration Repository. This tool is shipped as part of Oracle E-Business Suite. Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who are granted the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.
7. Select Apply to save your work. Or select Apply And Add Attributes to save and add attributes to this record. See: Creating Attributes, page 4-18

### To create a trade area attribute group by copying an existing record:

1. Navigate the Sites tabbed region of the Administrator, select the record you want to copy in the results region, and choose Copy.

   The Create Attribute Group for Trade Area page displays with the values from the original record.
2. Enter a unique value in the Internal name field. This value cannot be updated once a record has been created.
3. You have the option to select new values in the Display Name and Description fields.

   You cannot change the Behavior value, but you can change the values in the Number of columns and Number of rows fields.
4. Select Apply to save your work.

### To edit a trade area attribute group record:

1. Select an attribute group record to navigate to the Attribute Group Details page.
2. Select Update to display the Edit Attribute Group for Trade Area page.

3. You have the option to change the values in the following fields:

   **Note:** The Internal Name and Behavior type fields cannot be updated once an attribute group has been created.

   - Display Name
   - Description
   - Single-Row Behavior
     - Number of columns in the page layout—the number of columns to appear in the attribute group pages
   - Multi-Row Behavior
     - Number of columns shown in the table—the number of columns to appear in the attribute group pages.
     - Number of rows shown in the table—the number of columns to appear in the attribute group pages.

   The Business Entities region lists business events compiled in the Oracle Integration Repository. This tool is shipped as part of Oracle E-Business Suite. Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who are granted the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.

4. Select Apply to save your work.

## Viewing and Creating Trade Area Group Attribute Assignments

Assigning a trade area attribute group to a trade area is used in capturing trade demographics for viewing. It is also a required step for creating trade area group attribute pages.

### Assign trade area attribute groups to trade area groups:

1. In the Trade Areas tabbed region of the Administrator, select Assignments.
2. Select a value in the Trade Area field, and select Go.
3. Select the Attribute Groups tabbed region, and select Add Attribute Groups to display the Add Attribute Groups to Trade Area Group page.

You can filter the display by using a combination of attribute group display and internal name, attribute group description, or business entity. See: Searching for Information, page 5-3

4. In the results region, select the records you want to add to this trade area group.

   Select Apply. The new records appear on the Assignments page.

### To view and update trade area attribute group assignments:

1. In the Trade Areas tabbed region of the Administrator, select Assignments to display the Assignments page.

2. Choose a value in the Trade Area Group field, and select Go to display the attribute assignments for that purpose.

3. In the Attribute Groups tabbed region, select Add Attribute Groups if you want to add attributes to specific trade area group records.

4. Select a record to display the Attribute Group Details page. See: Trade Area Group Attribute Groups, page 4-33

5. Select Update Actions to navigate to the Actions page, see: Adding Actions to an Attribute Group, *Oracle Product Information Management Implementation Guide*

## Creating Trade Area Group Attribute Pages

Attribute pages can be created for each trade area for ease of data entry and viewing. You can assign multiple attribute pages to a specific trade area group. For each page, you can choose the attributes displayed and the specific order they are listed.

### To create trade area group attribute pages

1. In the Trade Area tabbed region of the Administrator, navigate to the Assignments region.

2. Select a value in the Trade Area Group field, and select Go.

3. Select the Attribute Pages tab, and in the Pages region select Create Page.

4. In the Create Trade Area Page, create an attribute page for the trade area by entering data in the Basic Information region:

   - Display Name—name displayed on the page

   - Description—a description of the attribute category

   - Internal Name—internal name for the page

- Sequence—sequence number for each page associated with an attribute group, the sequence number determines the order of the pages

5. Select the Attribute Groups tabbed region, and select Add Another Row to add attributes groups to this page. To add an existing attribute group:
   - Enter a Sequence number
   - Select an existing Display Name value
6. Select Apply to save your work.

   The attributes for this purpose, and the display sequence appear in the Pages region.

## Hierarchy Attributes

Hierarchy attributes are characteristics of hierarchical structures created for your sites. They are defined by their names and values, and saved within attribute groups. You can reuse the same attribute group across hierarchy records. Hierarchies are associated with a hierarchy purpose, providing the ability to categorize the hierarchy and its attribute structure. Nodes of the structure can be associated with these attributes. An unlimited number of attribute groups can be defined. Third party system data can be integrated, and you can generate a database view of existing attributes by selecting Generate Database View.

The Hierarchies tabbed region of the Site Administrator home page opens displaying all existing hierarchy attribute groups—you can filter the display by using a combination values. The Hierarchies tabbed region also provides access to pages to:

- Create and update hierarchy attributes
- Create and update hierarchy attribute assignments
- Personalize search criteria
- Manage display formats for search results

### Viewing, Creating, and Editing Hierarchy Attribute Groups

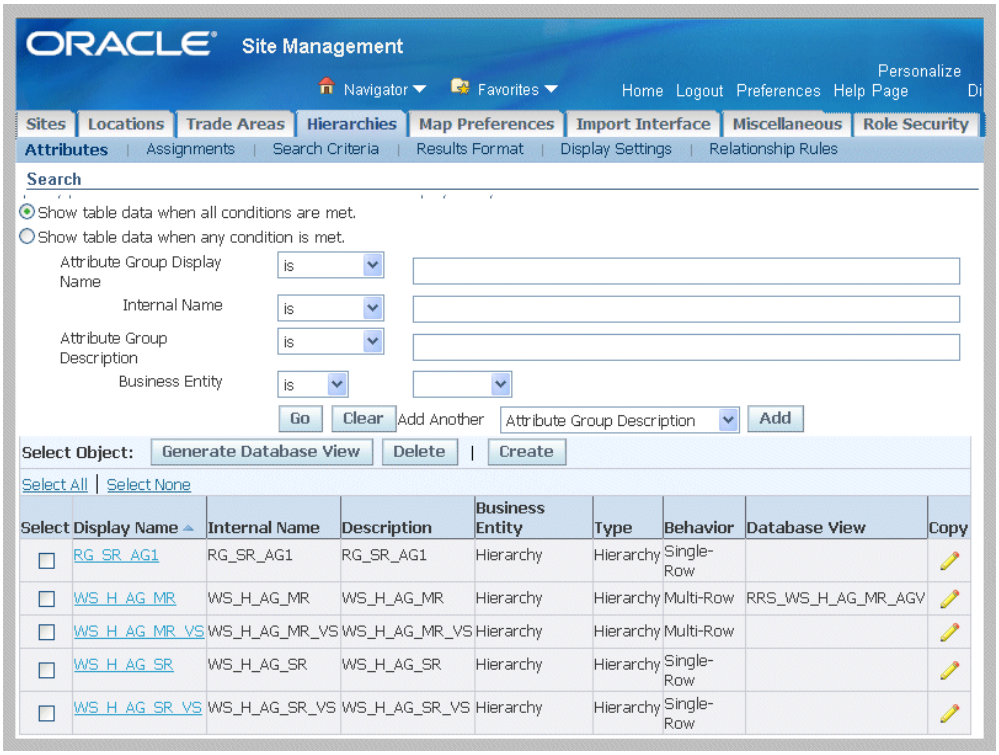
The Hierarchies tabbed region opens with all existing attribute groups displayed.

#### To view hierarchy attribute group details

1. Navigate the Hierarchies tabbed region of the Administrator.
2. You can filter the display by using a combination of values including attribute

group display and internal name, attribute group description, or business entity. See: Searching for Information, page 5-3

The results region displays records in a tabular format with the following information: Display Name, Internal Name, Description, Business Entity, Type, Behavior, and Database View.




3. Select a record in the Display Name field to navigate to the Attribute Group Details page.

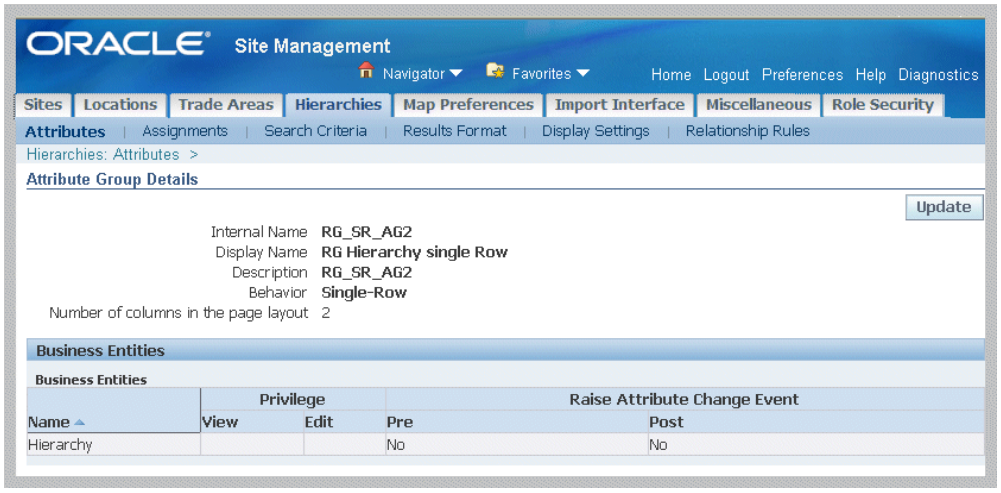
   This page displays information in the following fields for this attribute record:

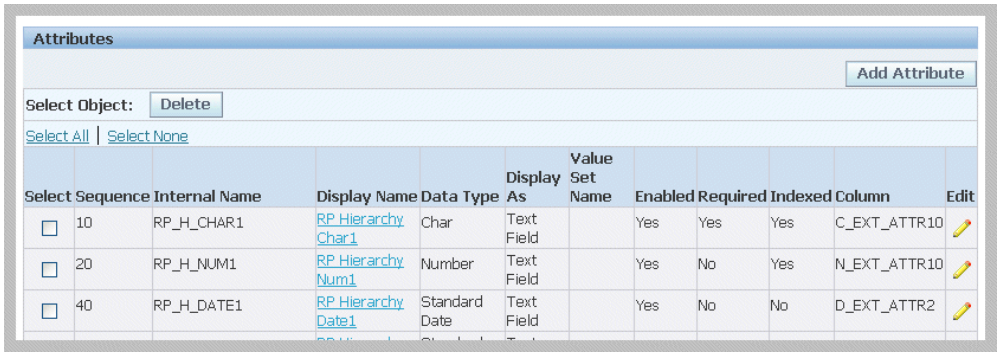
   - Internal Name—internal name for the page
   - Display Name—name displayed on the page
   - Description—a description of the attribute category
   - Behavior:
     - Single-Row associates one attribute value with each attribute—that is, data is captured in a one-to-one relationship.
     - Multi-Row associates multiple sets of attribute values with the same attribute—that is, data is captured as a table of values.

- Number of columns in the page layout—the number of columns to appear in the attribute group pages.

- Number of rows in the page layout—the number of rows to appear in the attribute group pages. This field only appears for multi-row attribute groups.

The Business Entities region lists business events compiled in the Oracle Integration Repository. This tool is shipped as part of Oracle E-Business Suite. Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who are granted the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.




4. This page enables you to select:

   - Update to navigate to the Edit Attribute Groups for Hierarchy page to make changes.

   - Maintain Unique Key to navigate to the Maintain Unique Key page for this

attribute group. This function applies only to multi-row attributes. A unique key is any set of attributes whose values can be used to uniquely identify a row within the attribute group. See: Defining Item Attributes and Attribute Groups, *Oracle Product Information Management Implementation Guide*

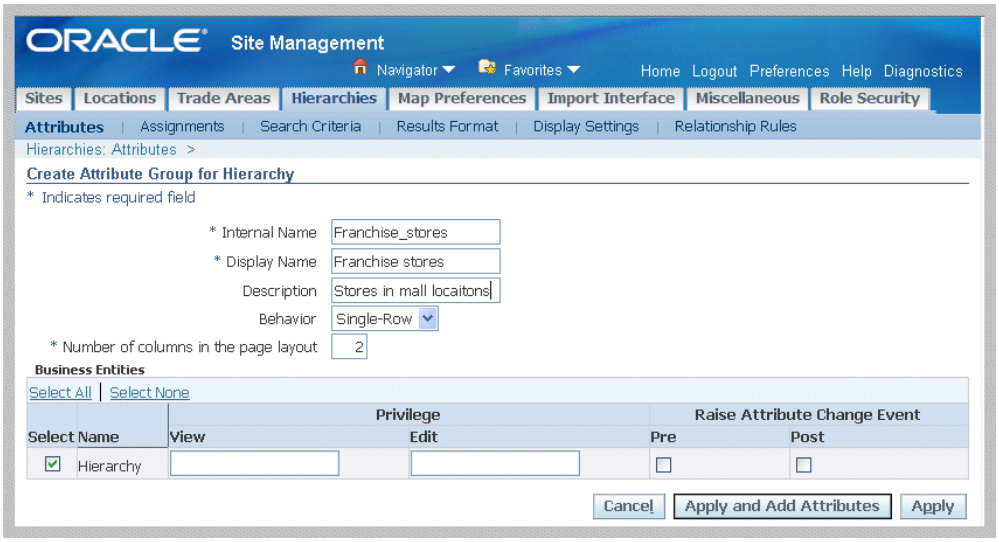
- Add Attribute to navigate to the Create Attribute page to create new attribute records. See: Creating Attributes, page 4-18

### To create an attribute group for a hierarchy:

1. Navigate the Hierarchies tabbed region of the Administrator, select Create to display the Create Attribute Group for Hierarchy page.

2. Enter a value in the Internal Name field; and the name you want displayed on the page in the Display Name field. The Internal Name value cannot be updated once a record has been created.

3. Optionally in the Description field, you can enter a description of the attribute category.




4. Select a value in the Behavior field:

   - Single-Row associates one attribute value with each attribute

   - Multi-Row associates multiple sets of attribute values with the same attribute

5. Enter a value in the Number of columns in the page layout. This is the number of columns to appear in the attribute group pages. The default value is 2.

6. If you selected Multi-Row a the value in the Behavior field, you can select a value in

the Number of rows in the page layout field. This is the number of rows to appear in the attribute group pages. The default value is 5.

The Business Entities region lists business events compiled in the Oracle Integration Repository. This tool is shipped as part of Oracle E-Business Suite. Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who are granted the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.

7. Select Apply to save your work. Or select Apply And Add Attributes to save and add attributes to this record. See: Creating Attributes, page 4-18

### To create a hierarchy attribute group by copying an existing record:

1. Navigate the Hierarchies tabbed region of the Administrator, select the record you want to copy in the results region, and choose Copy.

   The Create Attribute Group for Hierarchy page displays with some values from the original record.

2. Enter a unique value in the Internal name field. This value cannot be updated once a record has been created.

3. You have the option to select new values in the Display Name and Description fields

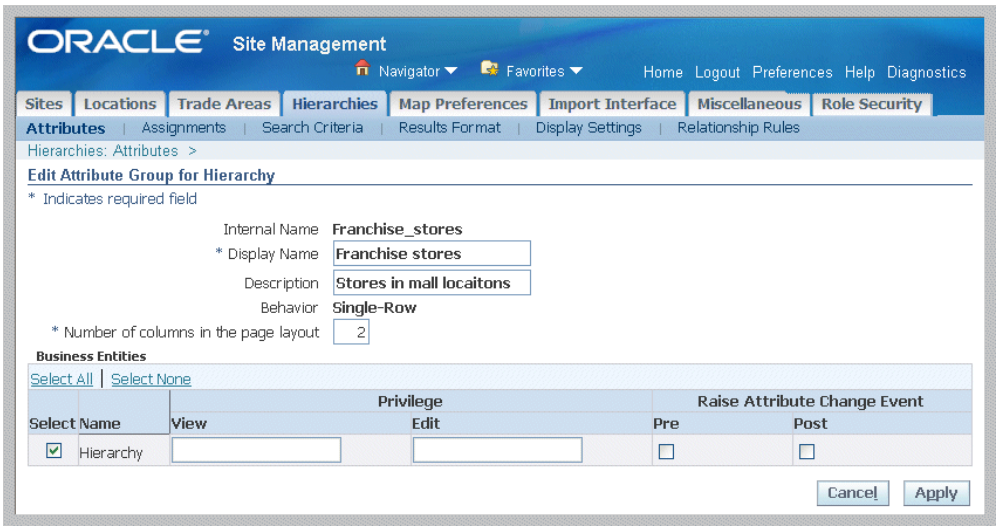
   You cannot change the Behavior value, but you can change the values in the Number of columns and Number of rows fields.

4. Select Apply to save your work.

### To edit a hierarchy attribute group record:

1. Select an attribute group record navigate to the Attribute Group Details page.

2. Select Update to display the Edit Attribute Group for Hierarchy page.




3. You have the option to change the values in the following fields:

   **Note:** The Internal Name and Behavior type fields cannot be updated once an attribute group has been created.

   - Display Name
   - Description
   - Single-Row Behavior
     - Number of columns in the page layout—the number of columns to appear in the attribute group pages
   - Multi-Row Behavior
     - Number of columns shown in the table—the number of columns to appear in the attribute group pages.
     - Number of rows shown in the table—the number of columns to appear in the attribute group pages.

   The Business Entities region lists business events compiled in the Oracle Integration Repository. This tool is shipped as part of Oracle E-Business Suite. Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who are granted the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.

4. Select Apply to save your work.

## Related Topics

Searching for Information, page 5-3

Setting Up Search Functions, page 4-55

Defining Item Attributes and Attribute Groups, *Oracle Product Information Management Implementation Guide*

Copying Attribute Groups, page 5-34

Creating Attributes, page 4-18

# Viewing and Creating Hierarchy Attribute Assignments

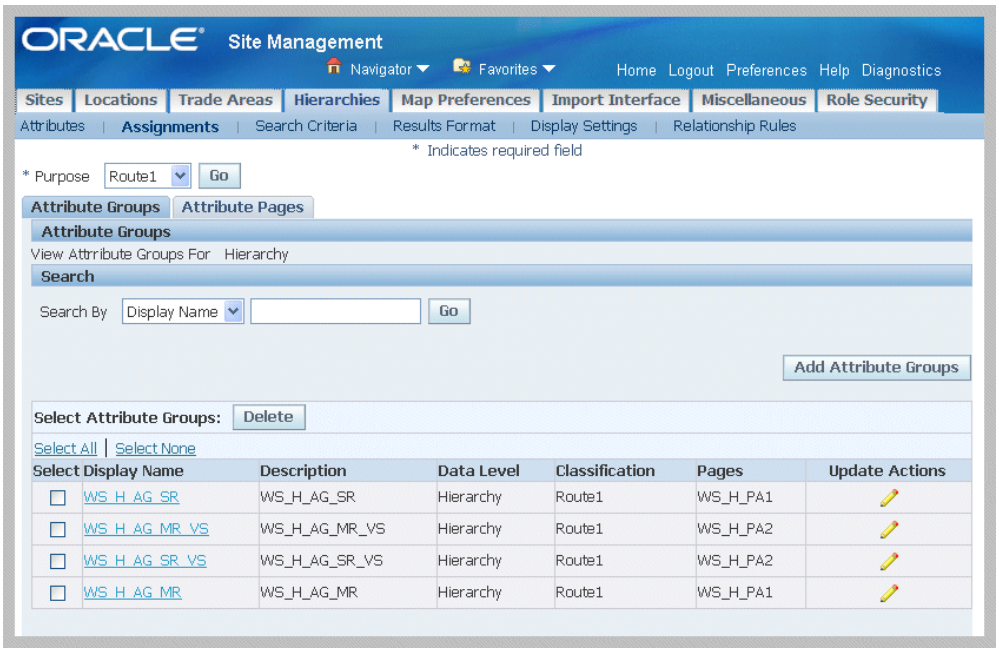
Attributes define the characteristics of the hierarchy, and purposes specify the function. Assigning an attribute group to a hierarchy purpose is an important step for viewing and editing associated attributes for hierarchies with corresponding purposes.

See: Hierarchy Attributes, page 4-39

### To add attribute groups to a hierarchy purpose:

1. In the Hierarchies tabbed region of the Administrator, select Assignments.
2. In the Assignments page, select a value in the Purpose field, and select Go.

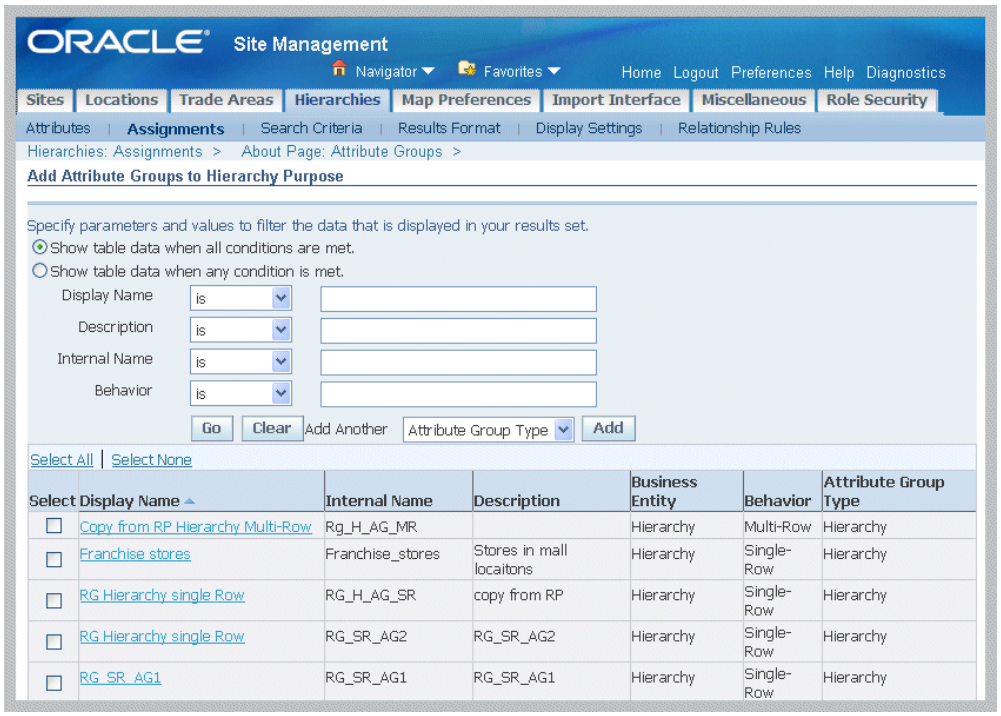
   All the attribute groups assigned to this hierarchy purpose display in the results table.




3. In the Attribute Groups tabbed region, select Add Attribute Groups to display the Add Attribute Groups to Hierarchy Purpose page.

   You can filter the display by using a combination of attribute group Display Name Description, Internal Name, and Behavior. Or you can select Add to add other search parameters, see: Searching for Information, page 5-3

4. In the results region, select the records you want to add to this hierarchy purpose.




5. Select Apply. The new records appear on the Assignments page.

### To view and update hierarchy attribute group assignments:

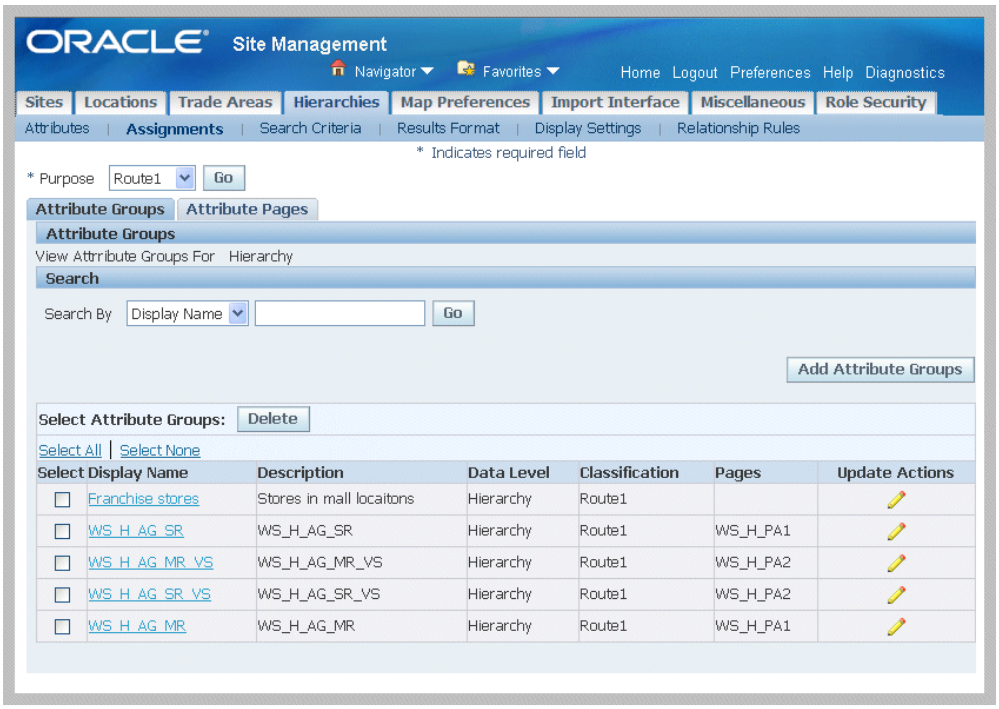
1. Navigate to the Hierarchies Assignments page.

2. Choose a value in the Purpose field, and select Go to display the attribute assignments for that purpose.

   Records display in a table. You can view details in the Attribute Groups or Attribute Pages tabbed regions.

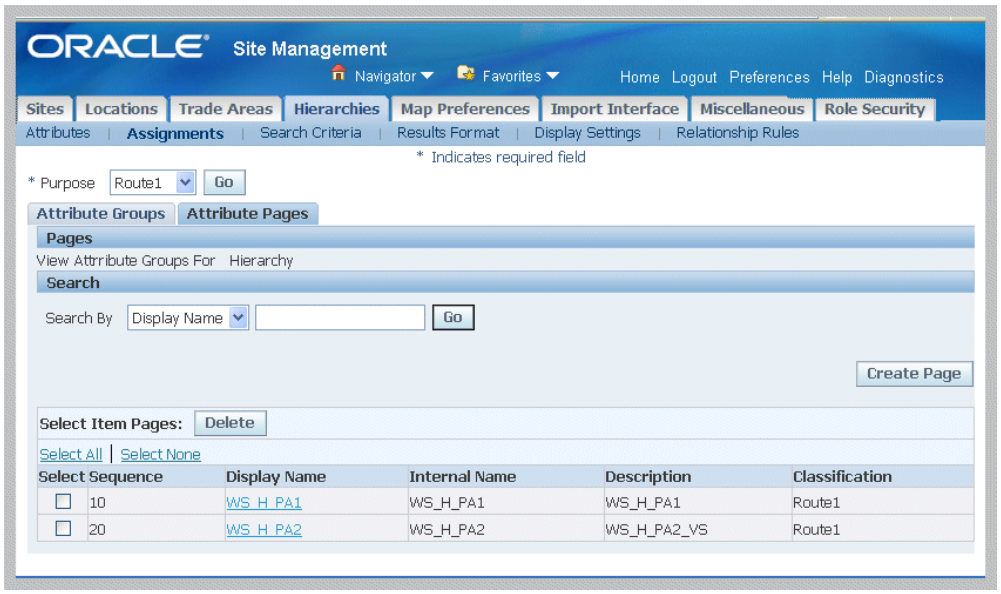
   - The Attributes Group tab displays all the assignments for the purpose selected

   - The Attribute Pages tab displays all the pages defined for the purpose selected




3. Select Add Attribute Groups if you want to add attributes to specific site purpose records.

4. Select Update Action to navigate to the Actions page. See: Adding Actions to an Attribute Group, *Oracle Product Information Management Implementation Guide*




5. In the Attribute Pages tab, select a record to display the Attribute Group Details page. See: Viewing, Creating, and Editing Hierarchy Attribute Groups, page 4-39

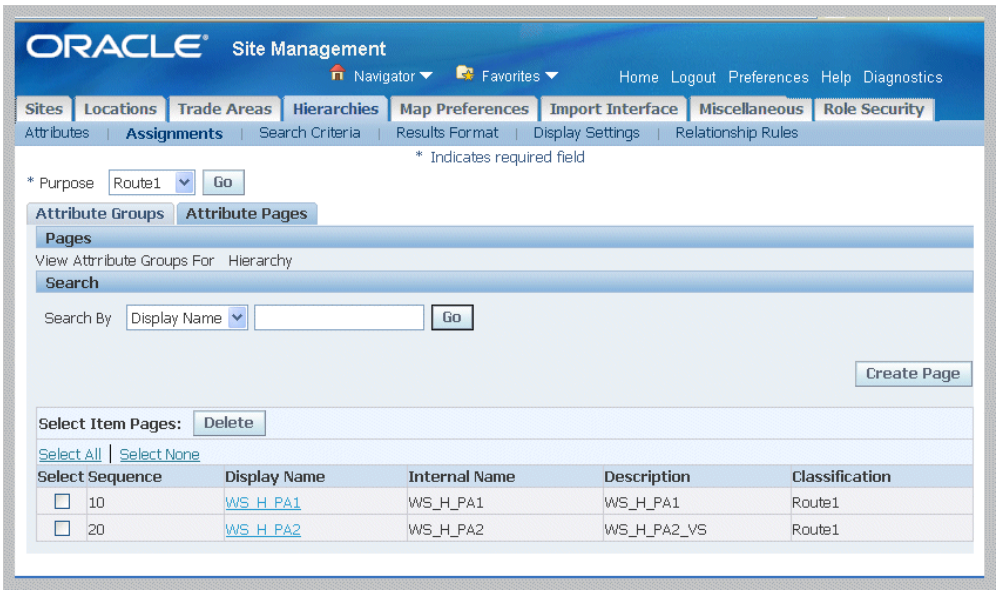
## Creating Hierarchy Attribute Pages

Hierarchy attribute pages are created for the various hierarchy purposes, and assigned attribute groups for ease of data entry and viewing. For each page, you can choose the attributes displayed and the specific order they are listed. You can also assign multiple attribute pages to a single hierarchy purpose.

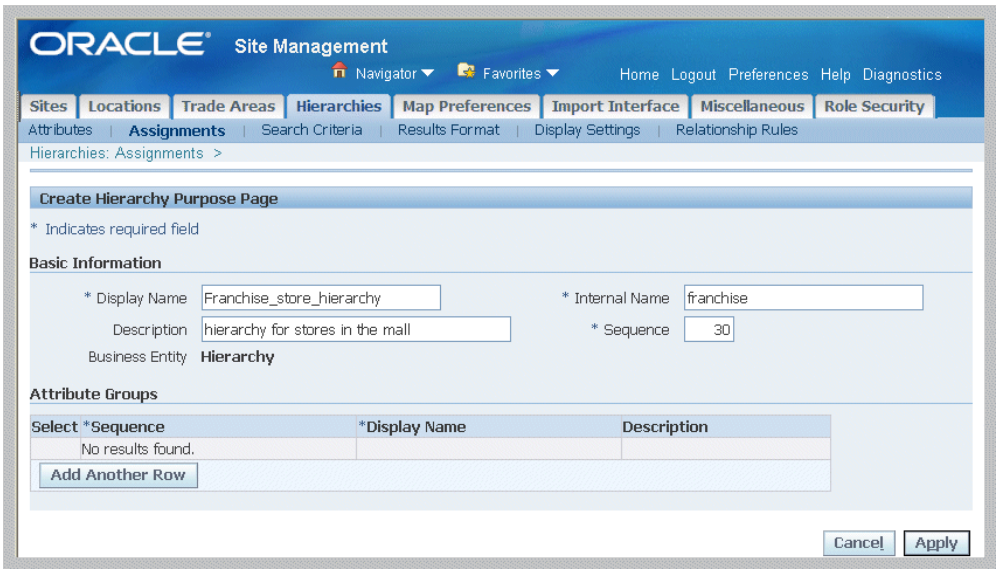
### To create hierarchy attribute pages:

1. In the Hierarchies tabbed region of the Administrator, select Assignments.
2. Select a value in the Hierarchy Purpose field, and select Go.
3. Select the Attribute Pages tabbed region.

   The pages that currently exist display in the table.




4. Select Create Page.

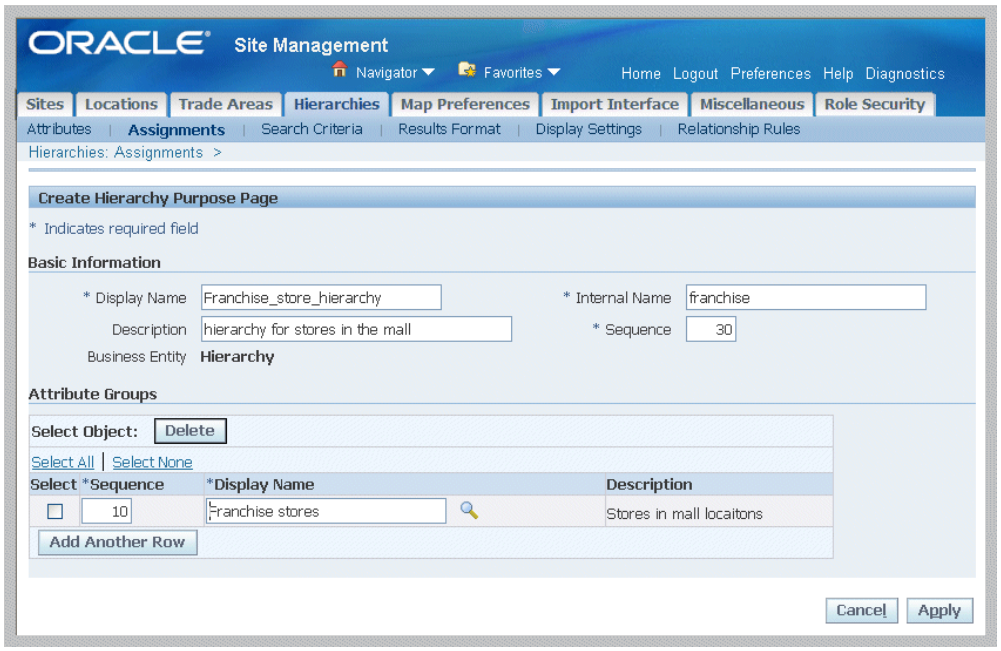



5. In the Create Hierarchy Page region, create an attribute page for the hierarchy purpose by entering data in the Basic Information region:

   - Display Name—name displayed on the page
   - Description—a description of the attribute category
   - Internal Name—internal name for the page, this value cannot be updated once a page has been created

- Sequence—sequence number for each page associated with an attribute group, the sequence number determines the order pages are listed

6. In the Attribute Groups region, select Add Another Row to add attributes groups to this page. To add an existing attribute group:
   - Enter a Sequence number
   - Select an existing Display Name value




7. Select Apply to save your work.

   The attributes for this purpose, and the display sequence appear in the Pages region of the Assignments page.

## Viewing and Defining Hierarchy Display Settings

Hierarchy structures and their associated sites are viewed on the Hierarchy Workbench. The Display Settings page in the Site Administrator is used to upload images as markers for particular hierarchy and site purposes, and associate attribute pages to these purposes for viewing on the Hierarchy Workbench. You can:

- Set different icons for site and hierarchy records. This offers a visualization of the hierarchy and associated site purposes.
- Upload image files of any file size for icons on the Hierarchy Workbench. Images are sized when uploaded.

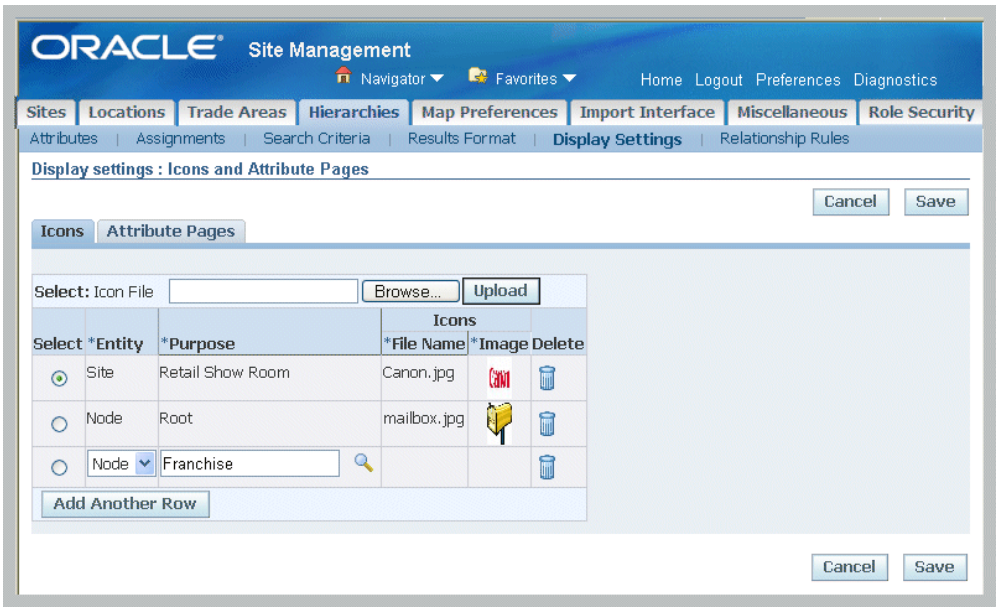
- Associate hierarchy and site purposes to attribute pages to view on the workbench.

See: Overview of Site Hierarchies, page 7-1

### To view and define hierarchy display icons:

1. Navigate to the Hierarchies Display Settings page.

2. In the Icons tabbed region, a list of the existing hierarchy or site and icon associations display in the table.




3. Select Add Another Row, and select an Entity type. Choices are Site or hierarchy Node.

4. Select a value in the Purpose field according to the type of Entity selected:
   - Site: Site Purpose
   - Node: Hierarchy Purpose

   **Note:** Purposes are associated to only one icon record.

5. To import an image, select an entity record in the Icons table.

6. Select Browse to search for a graphic image in the Icon File box, and select it.

7. Select Upload to associate it with the record.

8. Save your work.

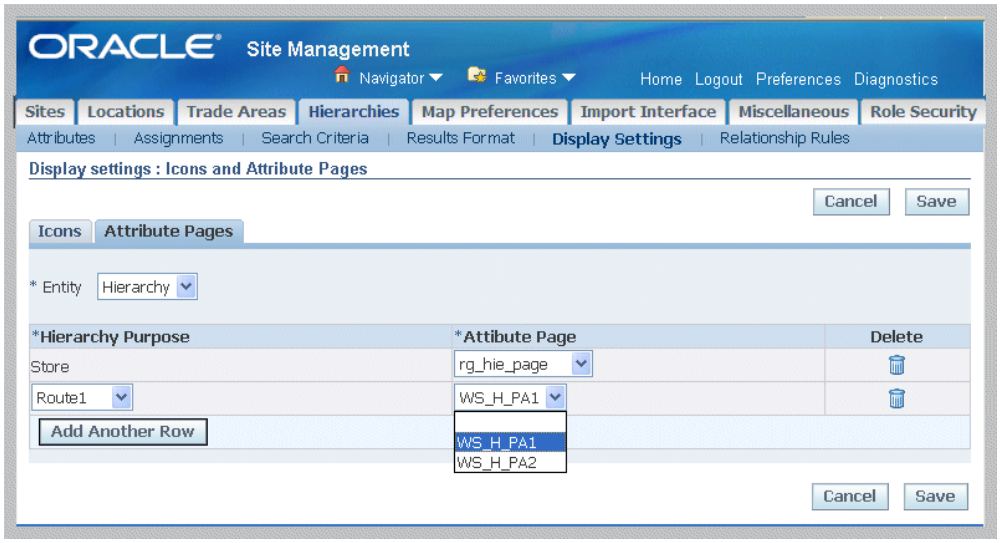
### To view and associate hierarchy and site purposes with attribute pages:

1. Navigate to the Hierarchies Display Settings page, the Attribute Pages tabbed region.

2. In the Entity field, select the entity type, Hierarchy or Site.

   - For Hierarchy, you see the association of hierarchy purpose records with hierarchy attribute pages.

   - For Sites, you see the association of hierarchy and site purpose records, with site attribute pages.




3. To create an association with a hierarchy purpose and hierarchy attribute page, select Hierarchy in the Entity field.

4. Select Add Another Row, and select a value in the Hierarchy Purpose field.

5. Select a Hierarchy Attribute Page value in the Attribute Page field.

6. Save your work.

7. To create an association with a hierarchy site purpose and site attribute page, select Site in the Entity field.

8. Select Add Another Row, and select a value in the Hierarchy Purpose field.

9. Select a value in the Site Purpose field.

10. Select a value in the Site Attribute Page value Attribute Page field.

11. Save your work.

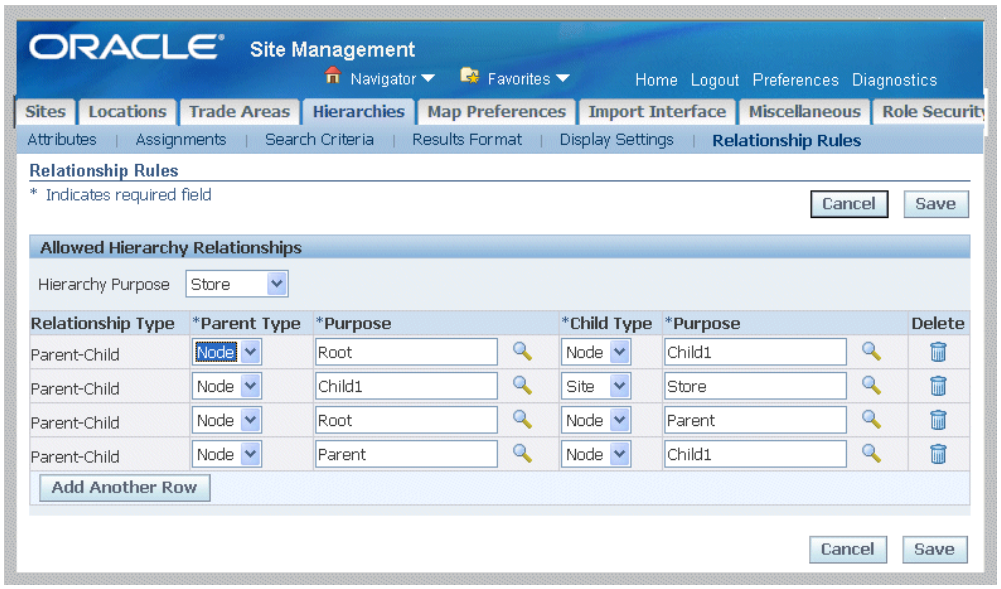
## Defining Hierarchy Relationship Rules

Organizations with a large number of sites often have parent and child relationships between their sites. Site Hub provides the ability to create site-to-site and site-to-node relationships in the context of a hierarchy. Relationship rules enable you to:

- Define the permissible combinations of sites and nodes in a hierarchy if rules are set on the Relationship Rules page. If rules are not set, there are no restrictions on relationships between sites and nodes
- Define rules based on site and node purposes for a particular hierarchy purpose.
- Create allowable associations between nodes and sites as identified by their purposes. Relationship rules define site, node, and purpose drag and drop destinations on the hierarchy.

### To view and define hierarchy relationship rules:

1. Navigate to the Relationship Rules page.
2. Select a value in the Hierarchy Purpose box to display the existing parent and child relationships for that purpose. The information displays in a tabular format including:
   - Parent Type: Hierarchy Node or Site
   - Parent Node or Site Purpose
   - Child Type: Hierarchy Node or Site
   - Child Node or Site Purpose




3. To define a new rule, select Add Another Row, and select a value in the Parent Type field. Choices are hierarchy Node or Site type.

4. Select the applicable purpose associated to the Parent Type, that is, the site or hierarchy purpose.

5. Select the Child Type for this Parent Type, choices are Node or Site.

6. Select the associated Purpose value for the Child Type.

7. Save your work.

## Setting Up Search Functions

The search functions in Site Hub enable you to create different search criteria for different business processes. You can personalize your search criteria. For site searches you can use a context—a combination of site purpose, country of location, and trade area group. For hierarchy searches you use hierarchy purpose values.

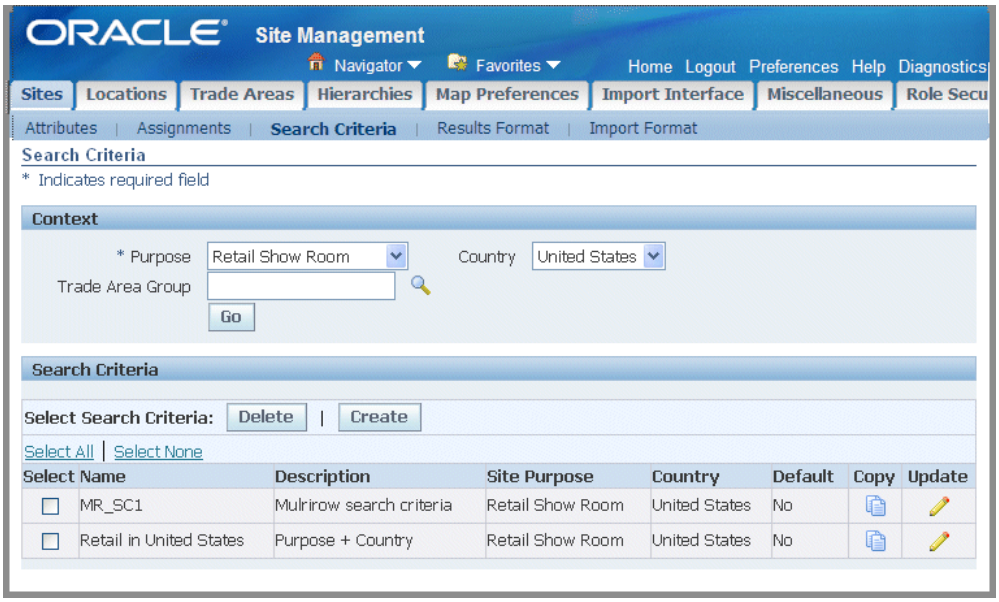
Different results formats enable specific attributes to be included in the result set and to be exported for various roles. You can define results formats across different attribute groups, and define import formats across attribute groups. Import formats are used to import and create new site and hierarchy records into Site Hub using the Microsoft Excel application.

### To view and create site search criteria:

1. Navigate to the Site Search Criteria page

2. Select a value in the site Purpose field.

3. Optionally, you can select values in the Trade Area Group and Country fields.




4. Select Go. Search criteria results records are displayed in the table.

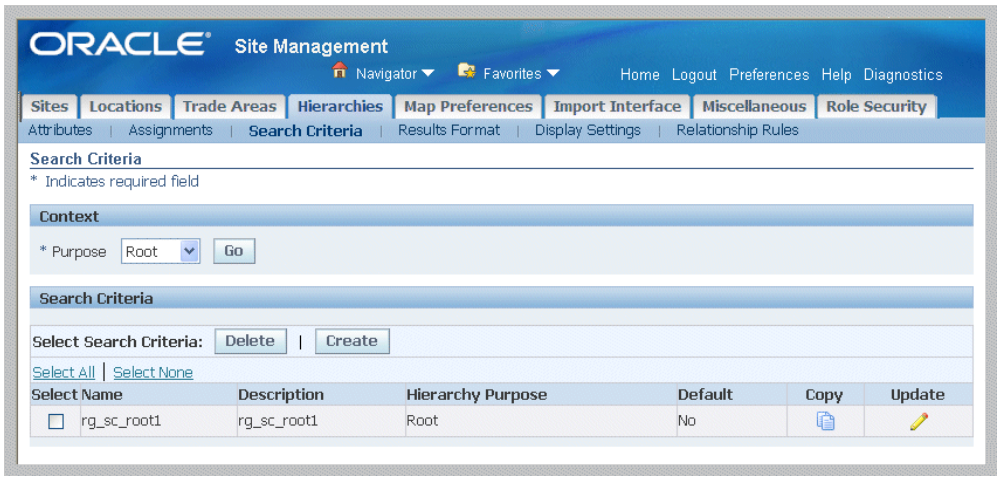
   This page enables you to access other pages to create, copy, and update search criteria. See: Managing Search Criteria, *Oracle Product Information Management Implementation Guide*

### To view and create hierarchy search criteria:

1. Navigate to the Hierarchy Search Criteria page.

2. Select a value in the hierarchy Purpose field.

3. Select Go. Search criteria results records are displayed in the table.




This page enables you to access other pages to create, copy, and update search criteria. See: Managing Search Criteria, *Oracle Product Information Management Implementation Guide*

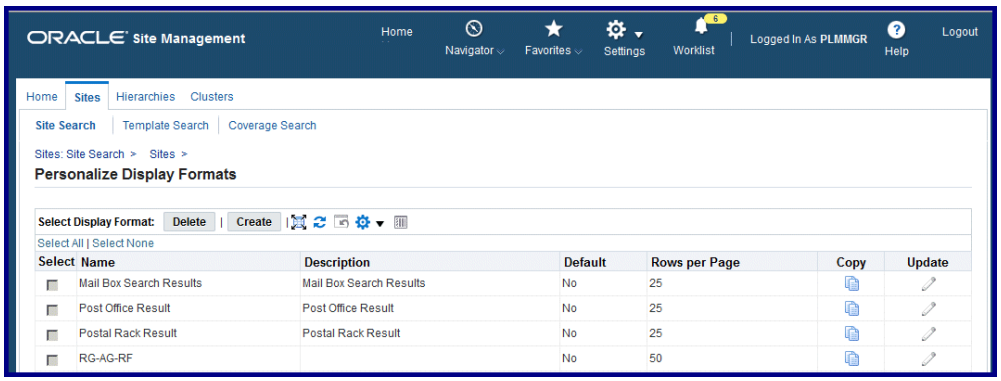
### To personalize site search result formats:

1. In the Site Simple Search page, select Personalize to display the Personalize Display Formats page.

   The table displays the results of the search. The following fields appear for this record: Name, Description, Site Purpose, Country, Default, Rows per Page.

2. Select Create to navigate to the Create Display Format page to create search results formats. See: Managing Display Formats, *Oracle Product Information Management Implementation Guide*

   This page also enables you to navigate to pages to Copy or Update this record.




### To define formats for your search results:

1. Navigate to the Results Format page from either the Sites or Hierarchies tabbed

regions.

2. For sites, in the Context region, select a value in the Purpose field. Optionally you can select values in the Country and Trade Area Group fields.

   For hierarchies, select a value in the Purpose field.

3. Select Go to display the results of your search in the Display Formats region.

   This page enables you to create a new record; or select a record for update or copy. See: Managing Display Formats, *Oracle Product Information Management Implementation Guide*

## Setting Import Formats

Site Hub enables the importing of new site records using a spreadsheet. You select a site import format for exporting records, and download the data to create sites. An import format identifies the particular site purpose these imported records inherit, and the attribute groups defined for the purpose.

### To view formats for importing sites:

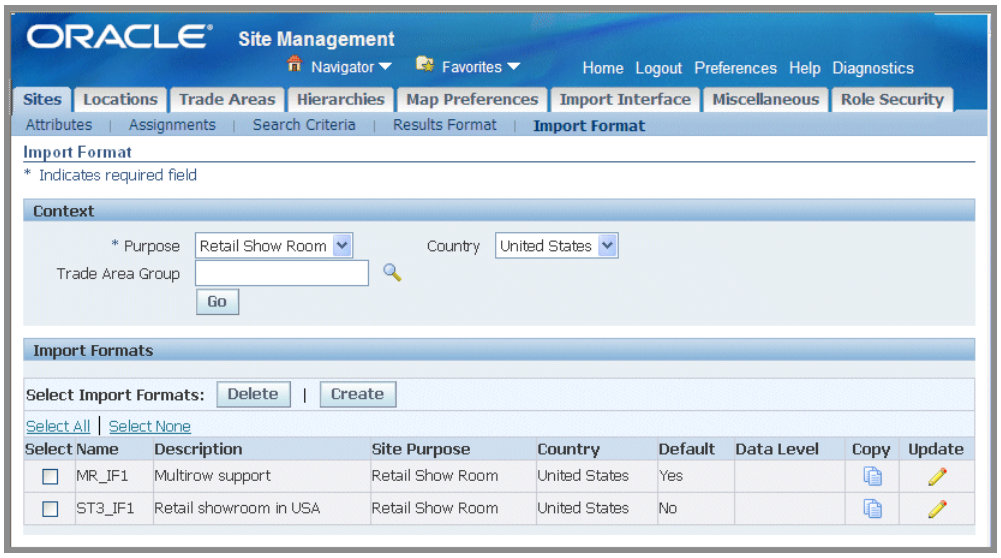
1. Navigate to the Import Format page.

2. In the Context region, select a value in the Purpose field. Optionally you can select values in the Country and Trade Area Group fields.

   The context values are used to filter the search criteria for existing format records.

3. Select Go to display the results of your search in the Import Formats region.

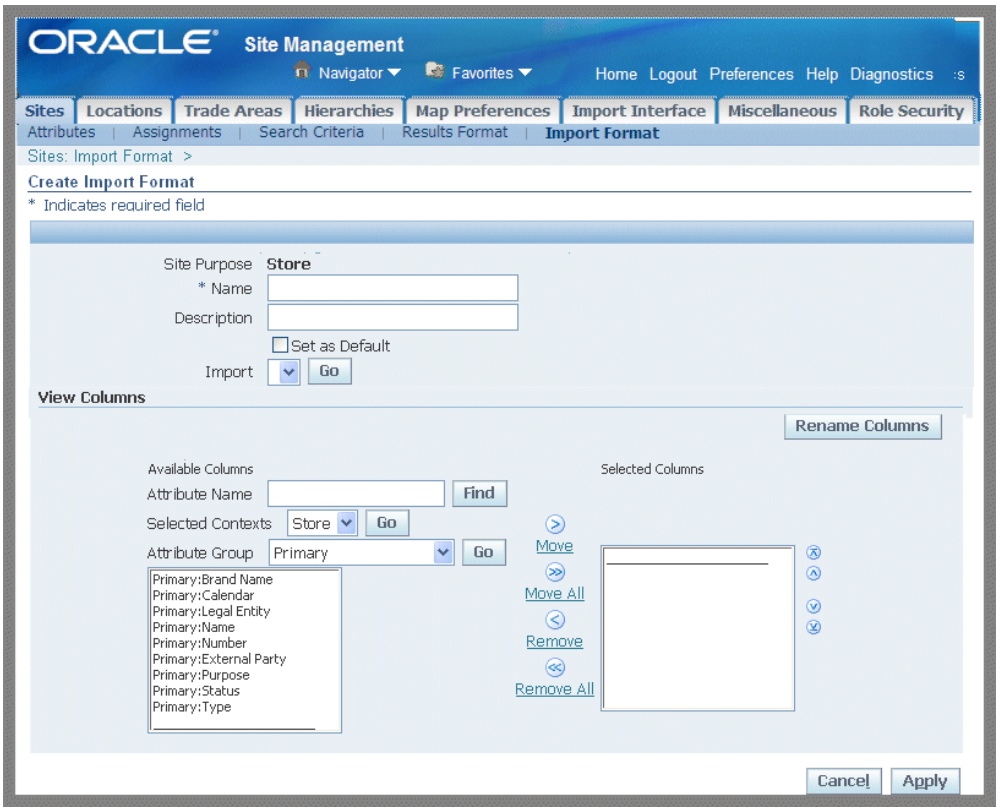
   Information displays for the records in the following fields: Name, Description, Site Purpose, Default, and Data Level. This page enables you to create, update, and delete records.




### To create an import format:

1. Select Create to display the Create Import Format page.
2. Enter a value for this format in the Name field, and optionally enter a description.
3. Enable the Set as Default check box if you want this to be your defaulted import format.

   **Note:** There can be only one default import format for each site purpose.




4. Select attribute column values in the View Columns region. Search for attribute column values by selecting values in the following fields:
   - Attribute Name
   - Selected Contexts
   - Attribute Group
5. Select Go to display the results of your search.
6. Select records in the Available Columns box—and move to the Selected box using the Arrow tool.
7. You have the option to customize your import format by renaming the attribute columns. Select Rename Columns to navigate to the Rename Columns page.

   The original column names of the records selected appear on this page.
8. Enter the new column names in the New Column Name field, and select Apply to save your work.

   See: Managing Display Formats, *Oracle Product Information Management*

*Implementation Guide*

The Create Import Format page refreshes with the new column names.

9. Select Apply to create your import format.

### To create an import format by copying another record:

1. Select a record on the Import Format page, and choose Copy.

   The Copy Import Format page displays showing the same values as the original record.

2. Enter a unique value in the Name field.

3. You have the option to use the defaulted values, or select new values in the Description and Set as Default fields.

   You also have the option to use the attribute column values defaulted in the Selected Columns box, or you can move or delete values using the Arrow tool.

4. Select Rename Columns to navigate to the Rename Columns page to customize attribute column names.

5. Enter the new column names in the New Column Name field, and select Apply to save your work.

   See: Managing Display Formats, *Oracle Product Information Management Implementation Guide*

   The Copy Import Format page refreshes with the new column names.

6. Select Apply to create your import format.

### To create modify an import format:

1. Select a record on the Import Format page, and choose update to display the Edit Import Format page.

2. You can modify all values with the exception of the values entered in the Context fields of Purpose, Country, and Trade Area Group. You can update:

   - Name
   - Description
   - Set as Default
   - Selected Columns

- Column Names

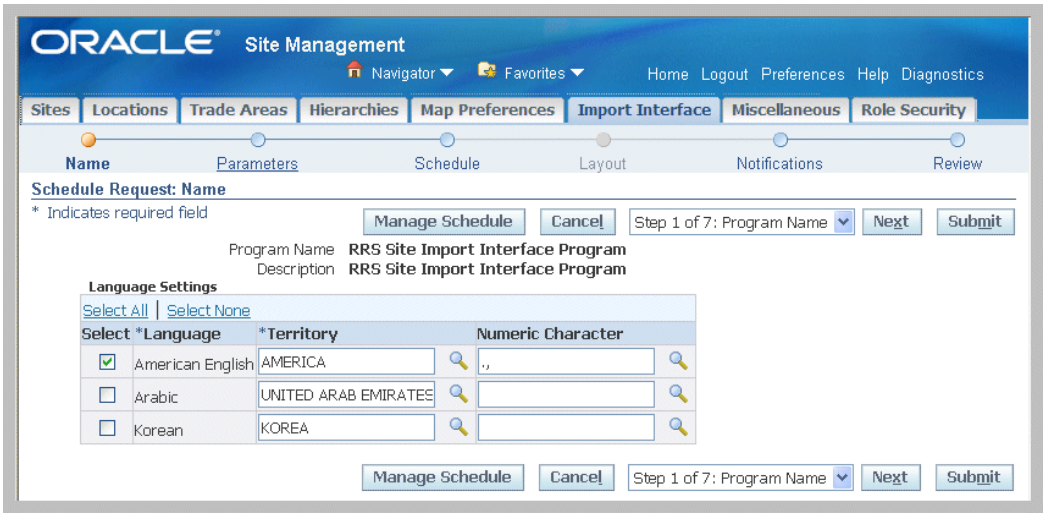
3. Select Apply to save your work.

## Using the Import Interface

You can import large volumes data sets to Site Hub using the import interface. The bulk import interface provides the ability to carry out high speed data import. The program is a concurrent program for importing site and user-defined attribute records into Site Hub. Before executing this program, insert the site and attribute data in the following tables in the Oracle Electronic Technical Reference Manual (eTRM):

- RRS_SITES_INTERFACE
- RRS_SITE_UA_INTF
- RRS_LOCATION_UA_INTF
- RRS_TRADEAREA_UA_INTF

During the import process, and moved to the base tables after it is validated.. Invalid rows of data are copied over to an error log. The RRS_INTERFACE_ERRORS table contains any errors generated during processing of the batch. The invalid rows can be corrected and resubmitted for processing.




## Associating Value Sets to Attributes

Oracle Application Object Library uses values, value sets and validation tables as components of flexfields and standard request submission. In Oracle Site Hub, attributes capture all the detailed information about sites. When creating your

attributes, you can create records with validation logic to support the needs of your organization. This functionality is enabled by associating value sets with your attributes. It is recommended that you create value sets before defining your attribute groups. Value sets have the following features in Site Hub:

- Attributes can have a static or dynamic list of valid values, or a range of values.
- You can optionally specify a value set with data type and validation rules to be applied when entering data.
- Value sets can be reused for different attributes.
- You can create child value sets that are subsets of a parent value set.

  The parent value set includes all possible values while the child value sets include some of the values from the parent value set.

See: Overview of Values and Value Sets, *Oracle E-Business Suite Flexfields Guide*

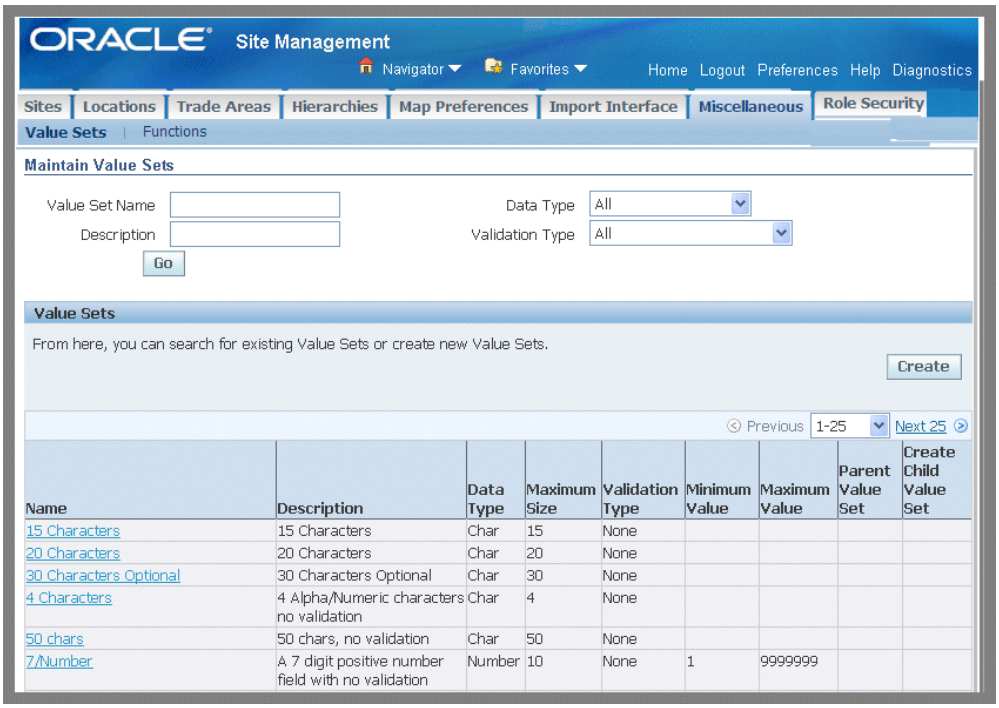
### To search for and view existing value set records:

1. Navigate to the Maintain Value Sets page in the Miscellaneous tabbed region of the Administrator.

   All existing records appear in the Value Sets region of the page.

2. You can filter records by entering values in the Value Set Name, Description, Data Type, and Validation Type fields—and selecting Go.

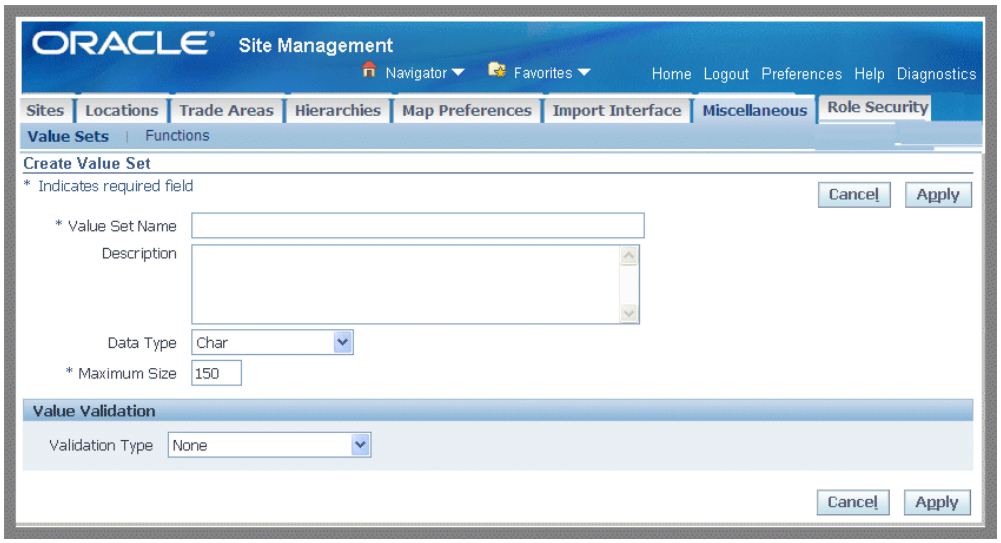
   The results of your search appear in the Value Sets region of the page. See: Defining Value Sets for User-Defined Attributes, *Oracle Product Information Management Implementation Guide*, and Value Set Windows, *Oracle E-Business Suite Flexfields Guide*




### To create a value set record:

1. Navigate to the Create Value Set page.
2. Enter information in the Value Set Name and Maximum Size fields.
3. Enter information in the fields:
   - Value Set Name
   - Description
   - Data Type
   - Maximum Size
   - Validation Type

   See: Value Set Windows, *Oracle E-Business Suite Flexfields Guide* , and Defining Value Sets, *Oracle E-Business Suite Flexfields Guide*




4. Select Apply to save your work.

## Viewing and Creating User Defined Functions

You can add user defined functions and actions to define your own custom logic to existing pages. This can be accomplished without having to customize the entire page. By first setting up user defined attributes, you can then execute user defined functions with those attributes. Using different algorithms, you can calculate values by passing attribute values to functions.

Functions use input and output parameters of various data types such as string, integer, or Boolean. You can:

- Use Java, URL, or PL/SQL functions
- Map these parameters to attributes and object primary key values. Actions are trigger points for functions displayed as buttons or links on the page.
- Determine the conditional visibility of the button and the label displayed on the button itself.
- Prompt the user based on the user's input.

> **Note:** User defined functions are available for user defined attributes only.

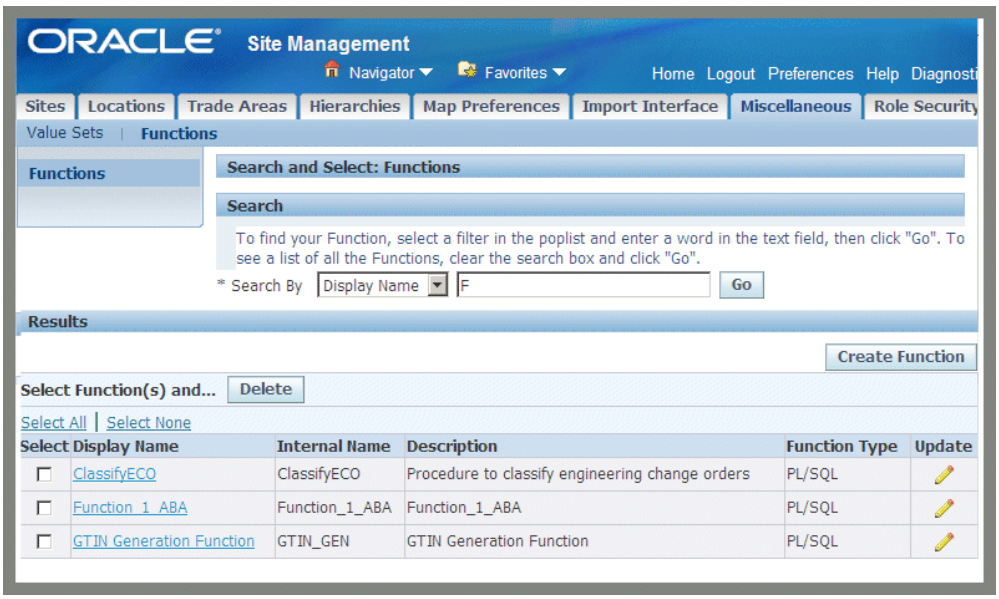
### To view and create user functions:

1. Navigate to the Functions page.

All existing user defined functions appear in the Results region in a table with the following columns: Description, Display Name, Function Type, Internal Name.

2. You can filter and search the record display. Select a column value in the Search By field, and optionally enter a word or partial word in the text box field.

3. Select Go to display the results of your search.



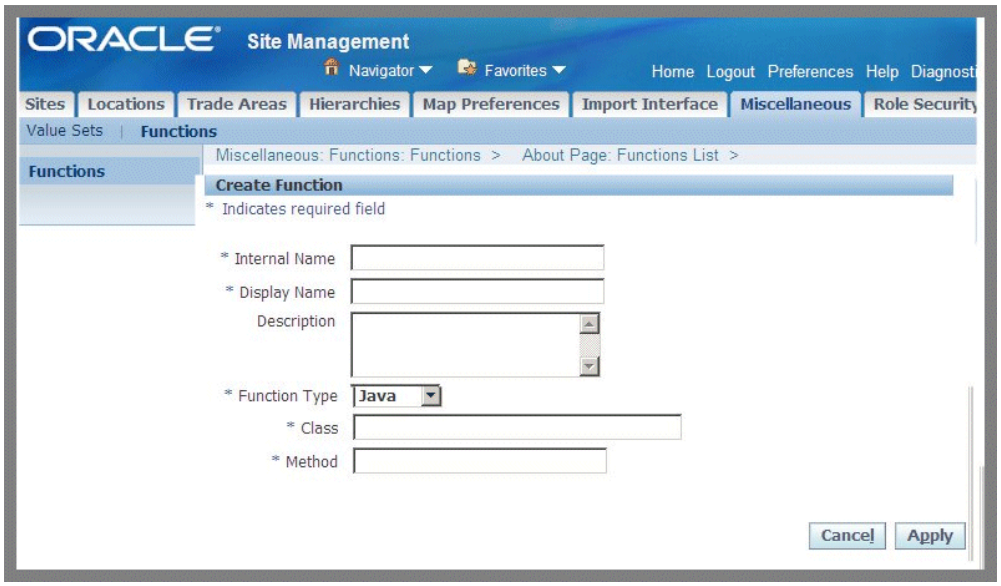

4. To edit a function record, select a record and select Update to display the Edit Function page.

5. To create a user defined function, select Create Function.

6. On the Create Function page, enter the following information:

   - Internal Name: Internal name of the function.
   - Display Name: Name of the function as it appears on the page.
   - Description
   - Function Type: Whenever you define a function, there must be an underlying implementation of that function. The supported function types are:
     - Java: When you select Java, specify the class in which the method resides and the method that implements your custom logic.
     - PL/SQL: When you select PL/SQL, specify the package and the procedure that implements your custom logic.

- URL: Specifies that the URL link. Specify the link.




7. Select Apply to save your work.

8. To create a user-defined function, and to create parameter mappings for a function, see: Creating User-Defined Functions for Item Attributes, *Oracle Product Information Management Implementation Guide*

# 5

# Site Management

This chapter covers the following topics:

- Overview of Site Management
- Searching for Information
- Viewing Site Information
- Creating Sites
- Updating Site Records
- Copying Attribute Groups
- Comparing Sites
- Viewing and Creating Site Clusters
- Viewing and Creating Site Templates
- Creating Site Assets
- Creating Property Locations for Sites
- Creating and Assigning Inventory Organizations to Sites

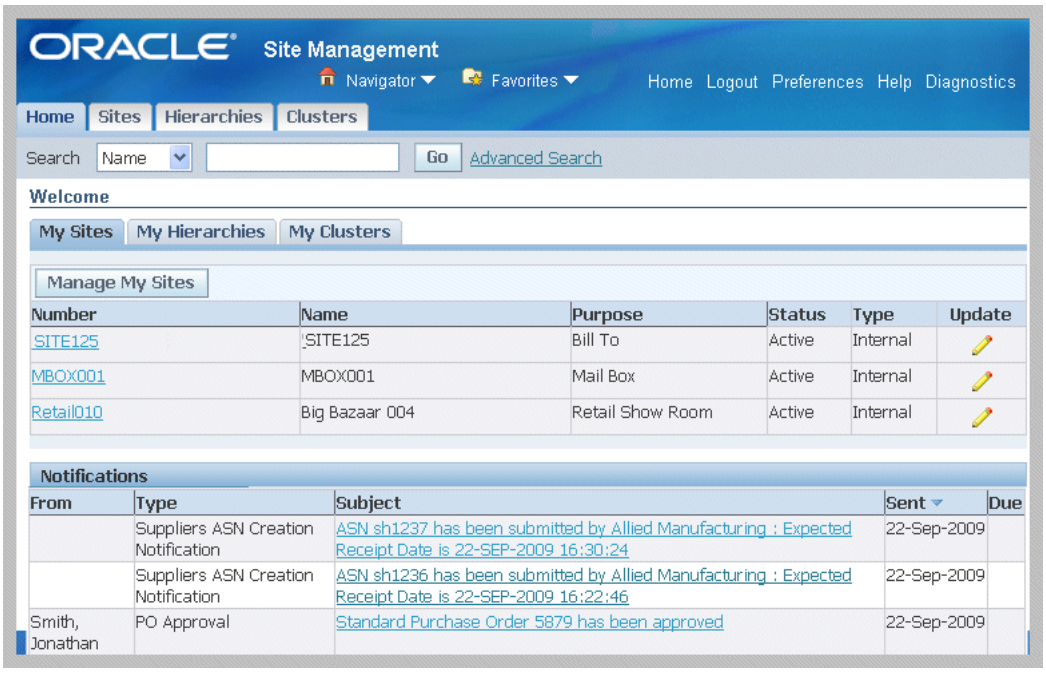
## Overview of Site Management

Oracle Site Hub provides a central place to store and maintain all information about sites in organizations. Sites can include stores, warehouses, manufacturing plants, distribution centers, retail locations, and executive offices. Once you create your sites, you can then create attributes and assignments.

The Site Management User Home page provides access to sites, and associated hierarchies and cluster records. Records appear when selected in the Manage My Sites, Manage My Clusters, or Manage My Hierarchies pages according to your preferences and requirements. You can then navigate to view and transaction pages for individual records. Each page displays a Notifications region for message information.

The selected records also appear when you enable the My Hierarchies or My Clusters

check boxes on appropriate pages.




## Managing Favorites

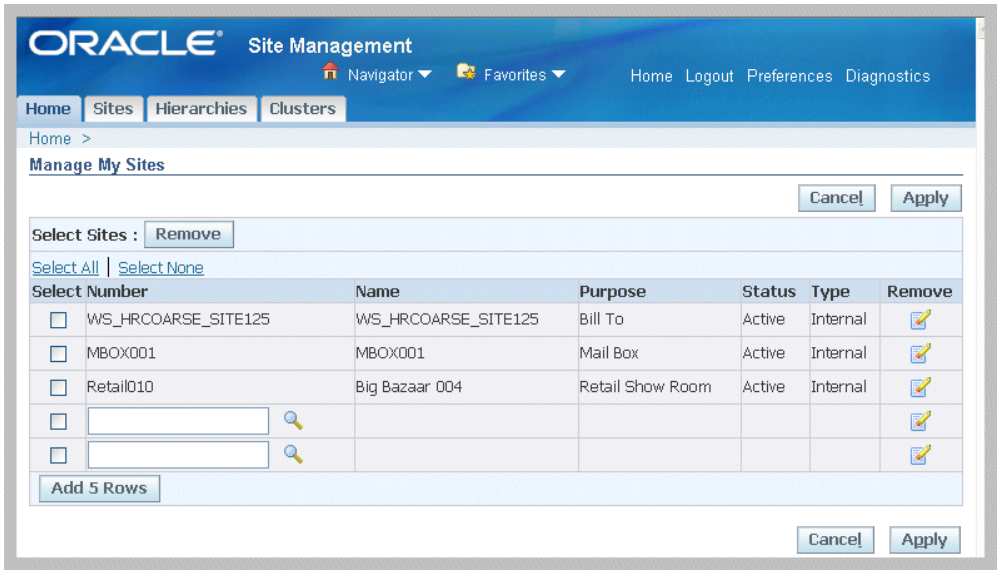
You can create a default display for sites, hierarchies, and clusters by selecting your preferred record display. On the Site Management User Home page—when Manage My Sites, Manage My Hierarchies, and Manage My Clusters is selected, you can choose the records you regularly access. These records appear according to individual login information.

> **Note:** If role based access security is implemented, users must have view privilege in order to add sites and hierarchies to their favorites records.

### To select favorites records:

1. Navigate to the Site Management User Home page.
2. Select the applicable entity type tabbed region, that is: My Sites, My Hierarchies, or My Clusters.
3. Select the applicable page:
   - Sites: Manage My Sites
   - Hierarchies: Manage My Hierarchies

- Clusters: Manage My Clusters




4. Select Add Rows to search for an appropriate record.

5. Save your work.

## Related Topics

Searching for Information, page 5-3

Viewing Site Information, page 5-10

Creating Sites, page 5-11

# Searching for Information

Search capability for finding existing records is available in Site Hub in two modes—Simple Search and Advanced Search. The search functionality uses attributes, keywords, and conditions to find records; and enables you to navigate to records, and view and update information:

- Simple Search enables searching when looking for a small number of sites, where you know some specific information such as name or record number. You can also select the My Sites, My Cluster, My Hierarchies, or My Templates check boxes to display the records you included in your Favorites list.

- Advanced Search provides searching using multiple search criteria and conditional qualifiers. This enables you to enter keywords or values, using qualifiers. This method is used when looking for very specific values.

- For complex searches performed on a regular basis, you can predefine and save search criteria You can also define the search results format displayed.
- You have the ability to sort search results and specify if the attributes should be sorted alphabetically or numerically, and in ascending or descending order.
- Site comparisons can be performed after results have been displayed. This enables you to select sites from the search results and compare data.
- For polygon sites defining zones for specific industries and territories, you can perform a coverage search to query a given radius or intersecting sites encompassing the coverage area.

### To search using the Simple Search page:

1. Navigate to the Simple Search page for either sites, hierarchies, clusters, or templates.
2. Enter search criteria, depending on the entity you are searching:
   - Sites

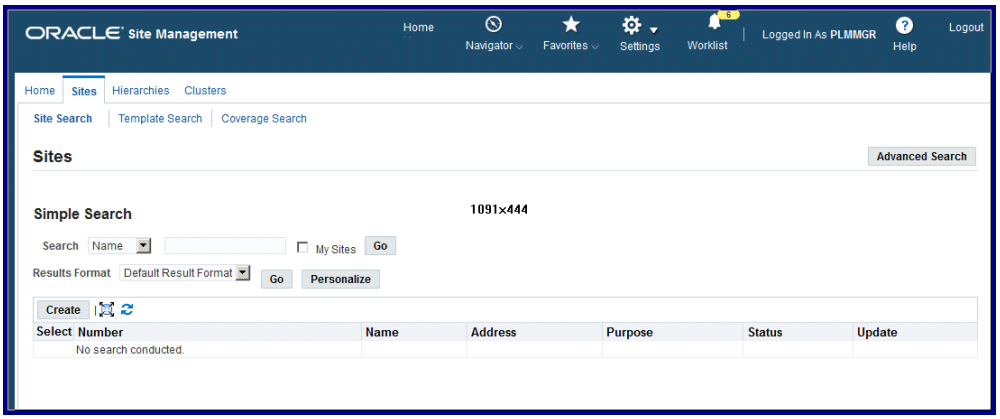
     Choices are Name, Number, or Status values. You can enable the My Sites check box to display the sites you included in your My Sites list.
   - Clusters

     Choices are Name or Description values. You can enable the My Clusters check box to display the records you included in your My Clusters list.
   - Hierarchies

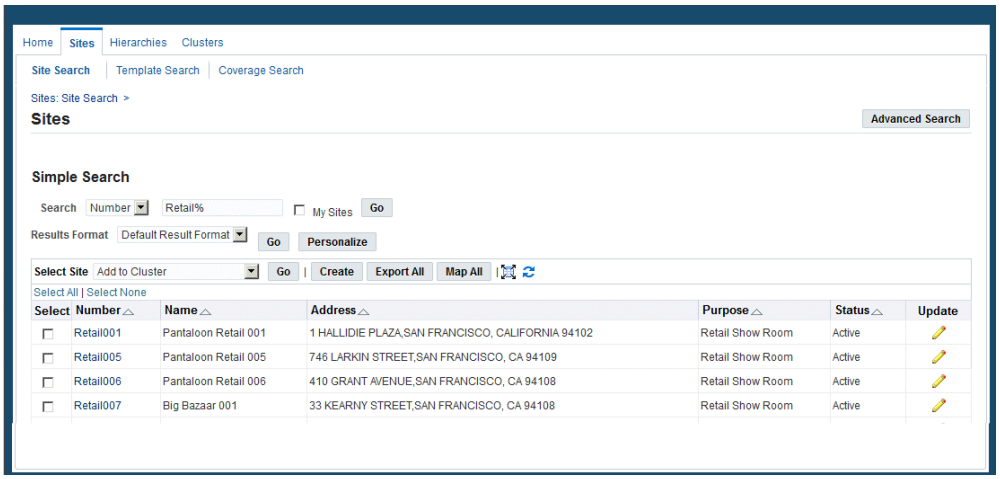
     Choices are Name, Description, or Purpose values. You can enable the My Hierarchies check box to display the records you included in your My Hierarchies list. See: Viewing Site Hierarchies, page 7-6
   - Templates

     Choices are Name or Number values. You can enable the My Templates check box to display the sites created using your login information.
   - Coverages

     Enter an address or geodetic coordinates to view the Site Map page with a marker representing the location on the map. You can select multiple sites to verify coverage within the area. See: Searching Coverage Areas, page 6-22




3. Select Go to display the results of your search.




4. To create a new record, select Create. See:
   - Creating Sites, page 5-11
   - Viewing and Creating Site Clusters, page 5-37
   - Creating Hierarchies, page 7-2
   - Viewing and Creating Site Templates, page 5-40

### To configure and access other pages in site searches:

1. For Site searches, you can use other formats for the results display: Select a value in the Results Format field

2. Select Go to reconfigure the display with another format.

3. To customize search formats, select Personalize, page 4-57

4. To navigate to other pages to perform transactions, select a record and in the Select Site box, and choose one of the options.

   Choices include:

   - Add to Cluster, see: Viewing and Creating Site Clusters, page 5-37
   - Add to Hierarchy, see: Viewing Site Hierarchies, page 7-6
   - Add to My Sites
   - Compare, see: Comparing Sites, page 5-35
   - Create Asset, see: Creating Site Assets, page 5-46
   - Create Cluster, see: Viewing and Creating Site Clusters, page 5-37
   - Create Inventory Organization, see: Creating and Assigning Inventory Organizations to Sites, page 5-48
   - Create Property Location, see: Creating Property Locations for Sites, page 5-47
   - Export, see: Creating Sites Using the Export and Import Function, page 5-23
   - Map Sites, see: Viewing Site Map Details, page 6-8
   - Select Export All to export records to a spreadsheet.
   - Select records to insert on a map, and select Map All, see: Defining Site Map Preferences, page 6-2
   - Select a record Number link in the table to navigate to see details of the site, see: Viewing Site Information, page 5-10
   - Choose a record and select Update to navigate to the Edit Site page.

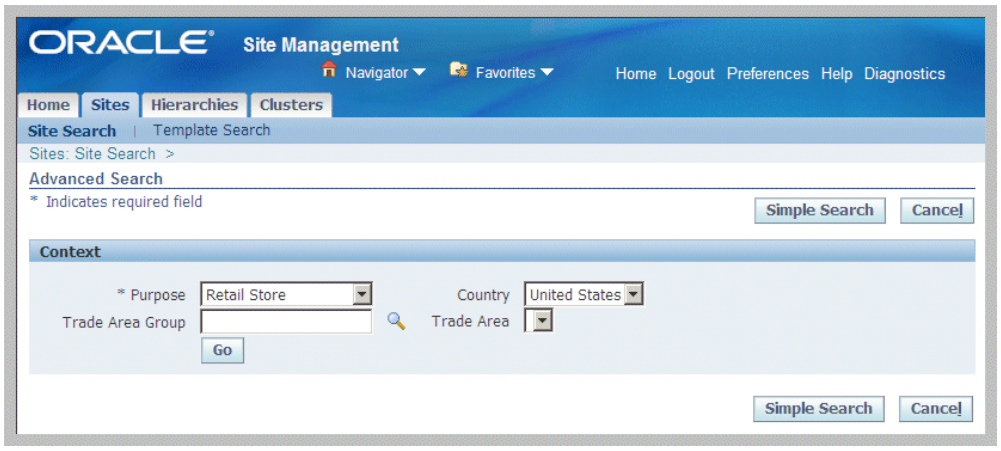
5. Select Go to display the appropriate page.

The Advanced Search function enables you to search for specific attribute values. For example—you can search sites in a particular location, with specific facilities, and specific operating hours. In this case the simple search capability is not sufficient. The advanced search using parameters and conditional qualifiers can return a focused search result set.

### To search for records using the Advanced Search page:

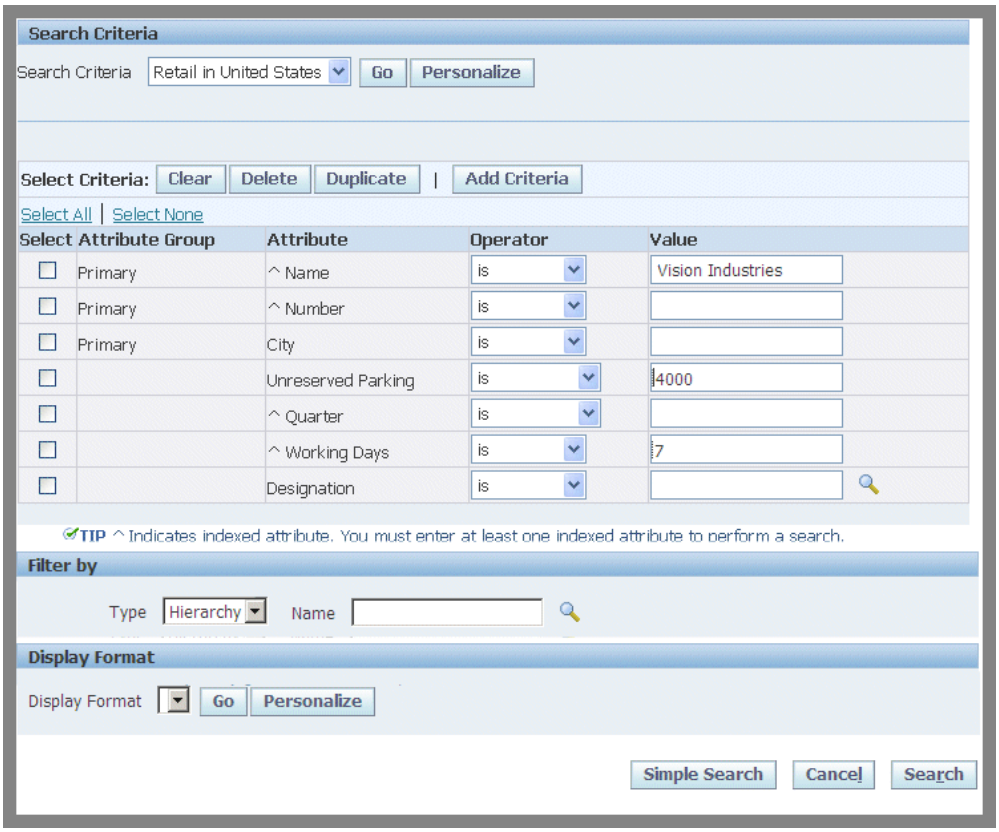
1. Navigate to the Advanced Search page.

2. In the Context region, select a Purpose value. For site advanced searches you can also select values in the Country, Trade Area Group, and Trade Area fields.




3. Select Go to display Search Criteria and Display Format regions to select other search criteria.

4. In the Search Criteria box, choose a record and select Go to display the Attribute Group and Attribute values.




5. Select an Attribute Group value, and enter values in the Operator and Value fields:
   - Operator—qualifiers include the following:
     - is
     - is not
     - contains
     - starts with
     - ends with
   - Value—any user-defined value

6. To duplicate a value on the list and use other search criteria value, choose an Attribute Group value and select Duplicate.

7. Select Add Criteria to display the Add Criteria page. This page is used to add more attribute values to the search criteria list. See: Managing Search Criteria, *Oracle Product Information Management Implementation Guide*

8. In the Filter by region, you can filter search results to sites contained within a hierarchy or cluster. Select either Cluster or Hierarchy. You can also enter a Name value.

   If you select Hierarchy, the default ordering of the search results is based on the hierarchy structure depth first, and then the sequence of sites within the hierarchy as seen in the Hierarchy Workbench. This ordering can be preserved when exporting the results to an Excel spreadsheet.

9. Optionally, if you have created other search formats, you can select a value in the Display Format field.

   To personalize search formats, select Personalize, page 4-57

10. Select Search to display the results of your query.

11. The results page enables you to navigate to other pages to perform the following:
    - To personalize search formats, select Personalize, page 4-57
    - Select records, and in the Select Site box, choose one of the options. Select Go.

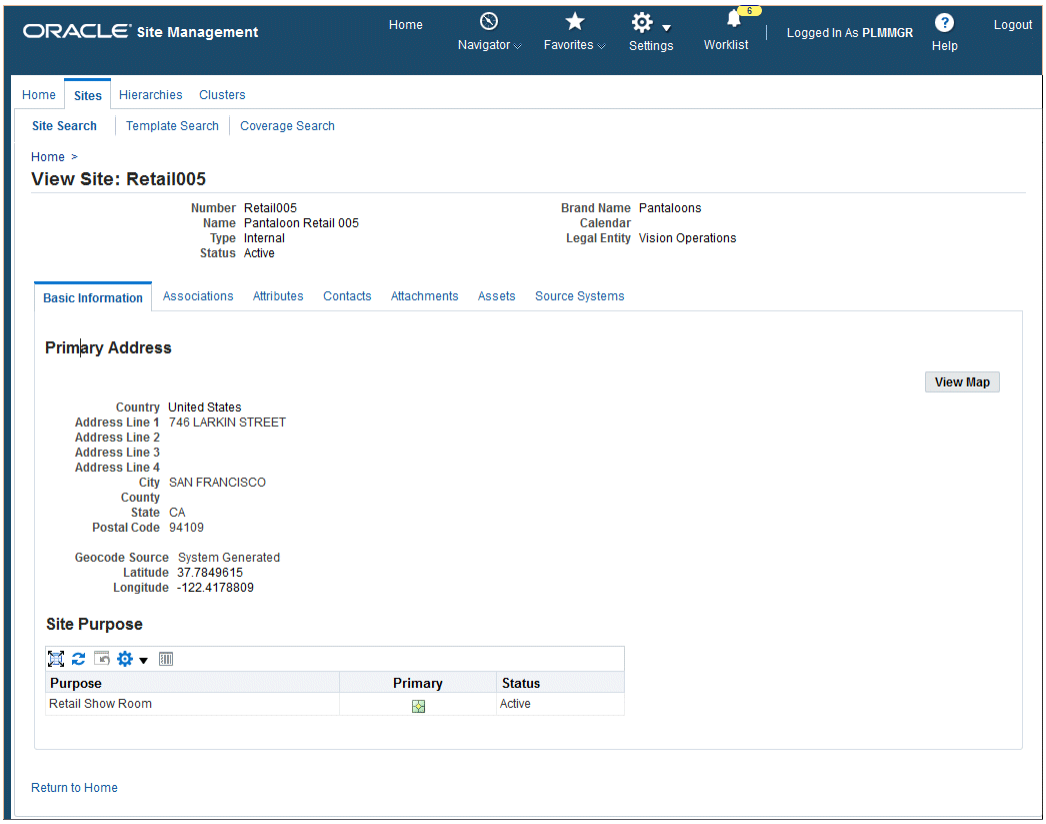
      Your choices include:
      - Add to Cluster, see: Viewing and Creating Site Clusters, page 5-37
      - Add to Hierarchy, see: Viewing Site Hierarchies, page 7-6
      - Add to My Sites
      - Compare, see: Comparing Sites, page 5-35
      - Create Asset, see: Creating Site Assets, page 5-46
      - Create Cluster, see: Viewing and Creating Site Clusters, page 5-37
      - Create Inventory Organization, see: Creating and Assigning Inventory Organizations to Sites, page 5-48
      - Create Property Location, see Creating Property Locations for Sites, page 5-47
      - Export, see: Creating Sites Using the Export and Import Function, page 5-23
      - Map Sites, see: Viewing Site Map Details, page 6-8
    - To add new sites, select Create. See: Creating Sites, page 5-11

- Select Export All to export records to a spreadsheet.
- Select records to insert on a map, and select Map All.
- Select a record Number link in the table to navigate to see details of the site, see Viewing Site Information, page 5-10
- Select Update for a record to navigate to the Edit Site page.

## Viewing Site Information

All information about a site is visible in the View Site page. This page consists of tabbed regions and offers the ability to view the geographic location of a site on a map.

When you navigate to the View Site page, the page displays information in fields for Number, Name, Type, Status, Brand Name, Calendar, and Legal Entity.




Several different tabbed regions display depending on the field values entered for the site record and integration with other applications:

- Basic Information—primary address, longitude and latitude, and site purpose data

- Associations—associated entities, property locations, trade area groups, clusters, hierarchies, and customers
- Attributes—three categories of attribute pages
- Contacts—data captured from Trading Community Architecture for parties, party sites, party relationships, and contacts
- Attachments—document attachments for this site
- Assets—assets associated with this site for maintenance organizations, including quantities and serial numbers
- Source Systems—functionality can be maintained for source system references for parties and party sites from Oracle Trading Community Architecture.

For detailed descriptions of these tabbed regions, see: Updating Site Records, page 5-26

## Creating Sites

There are several methods for creating new sites. You can create a new record manually—or create a record from copying a record, using a template, or using the import and export process:

- Manual Site Creation

  For organizations with a smaller number of sites, you can create a site using manual entry of data.

- Copying an Existing Site

  You can create new sites with similar attributes by copying an existing site and renaming the site record.

- Templates

  For organizations that have sites with similar attributes—such as a collection of stores or branches that are similar in size, merchandise, or services offered—you can create sites using configured templates. See: Viewing and Creating Site Templates, page 5-40

- File Import

  You have the ability to import multiple site records using a batch file import process. Mass import of sites is done through Excel upload. Web Services can also be used for create and update.

- Import Interface

  The bulk import interface provides the ability to carry out high speed data import

for large amounts of data, including site records. See: Using the Import Interface, page 4-62

- Draw Site on Google Map

  Polygons sites form an implied closed area. These areas can represent retail, public sector, insurance, and other types of territories. Geofencing enables you to dynamically create polygon sites on a map by dragging and clicking on the map directly. See: Creating Geofence Map Zones, page 6-17

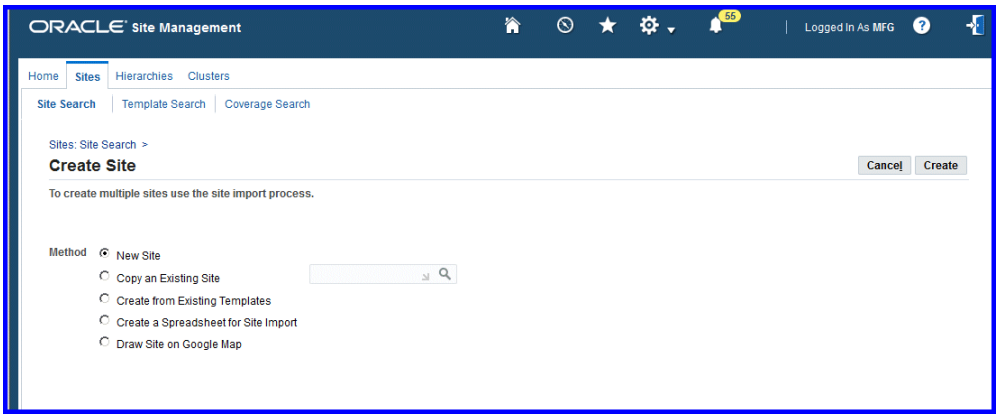
- Web Service

  You can create sites with a web service. Web service applications dynamically interact with other web applications using open standards that include XML, Universal Description, Discovery and Integration (UDDI), and Simple Object Access Protocol (SOAP). Oracle Integration Repository uses Web Services Description Language (WSDL) code. See:

  - Oracle Integration Repository Overview, *Oracle E-Business Suite Integrated SOA Gateway User's Guide*
  - Understanding Web Services, *Oracle E-Business Suite Integrated SOA Gateway User's Guide*
  - Oracle Integration Repository Overview, Oracle E-Business Suite Integrated SOA Gateway User's Guide
  - Understanding Web Services, Oracle E-Business Suite Integrated SOA Gateway User's Guide

### To manually create a new site:

1. Navigate to the Create Site page.




2. Select the New Site method, and select Create.

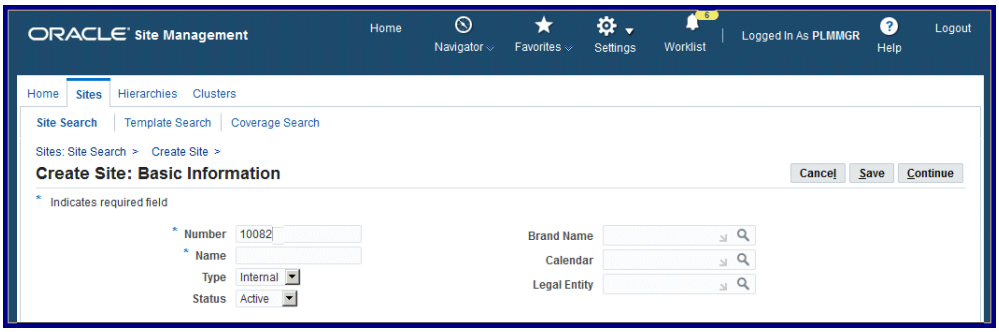
   The Create Site: Basic Information page displays.

3. Enter values in the Name and Number fields.

   If profile option RRS: Auto Default Site Number is set to Yes, the next number in the sequence appears. You can change the defaulted value to any unique value.

4. Optionally you can enter values in the following fields:

   - Type—identifies if the site is an Internal or External site
   - Status—Active or Inactive
   - Brand Name—company's identifying name, specified in the Site Hub Lookups, page 2-4
   - Calendar—BOM Calendar for the inventory organization associated with the site
   - Legal Entity—defined legal name




5. In the Primary Address region, select a value for address Source:
   - New: Displays the fields for entering an address.
   - Existing: Displays a search box to select an existing address in the Site Hub data.

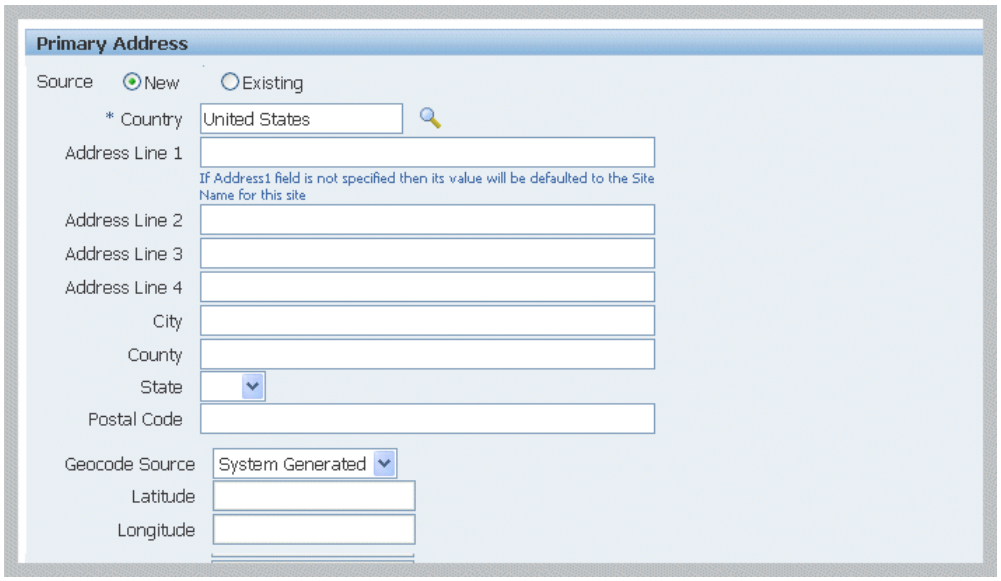
6. If you choose Existing, enter a search value to display existing records to select.

   Your selection appears in the Primary Address region.


7. If you choose New, select a value in the Country field.

   For new addresses, you have the option to enter values in either the address lines or in the Geocode Source fields.

8. For address lines, enter data in the following fields:
   - Address Line 1- 4
   - City
   - County
   - State
   - Postal Code




9. Optionally, you can use values in the Geocode Source fields to generate the geodetic coordinates for the site, instead of the address values. The default for this field is set in the profile option: RRS: Default Geocoding Preference:

   - System Generated: The Geocoder program is automatically launched when the site record is saved, and uses the address fields to find geodetic coordinates.

   - User Entered: Geocoder program uses the longitude and latitude values entered in the site record to find geodetic coordinates, and the program is manually launched to find the geodetic coordinates.

10. If you select User Entered in the Geocode Source field, enter values in the Longitude and Latitude fields.

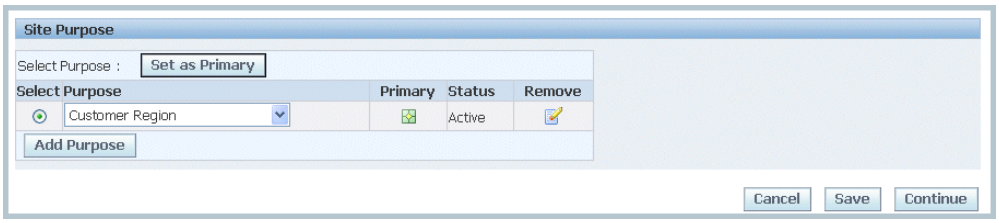
    These fields are disabled if you selected the System Generated Geocode Source. Enter the values in decimal format.

    **Note:** Use the same values for multiple sites at the same address.

11. In the Site Purpose region, choose Add Purpose to set a purpose for this site and select a record from the list of values.

    Purposes specify the function used for the site and must have an active status in Trading Community Architecture (TCA).

12. If you select more than one purpose, designate one record as your primary purpose by selecting Set as Primary.

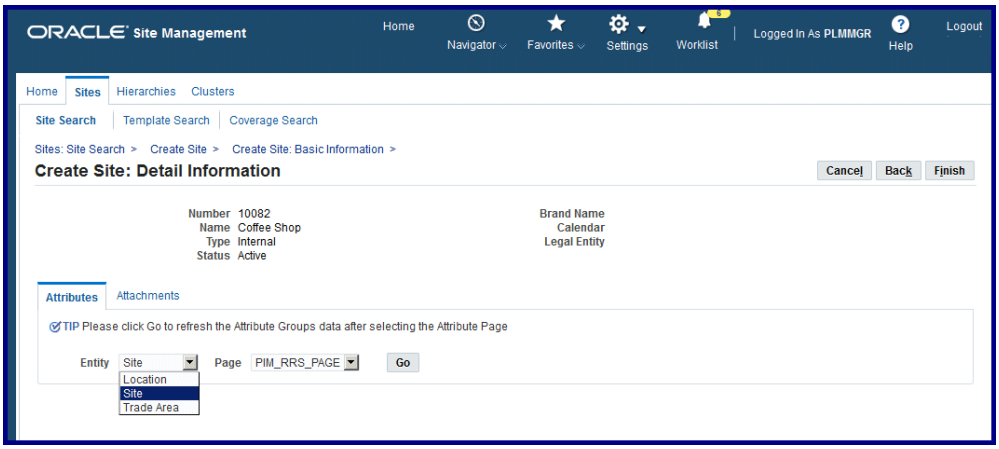



13. Select Save to save your record; or select Continue to add detail information.

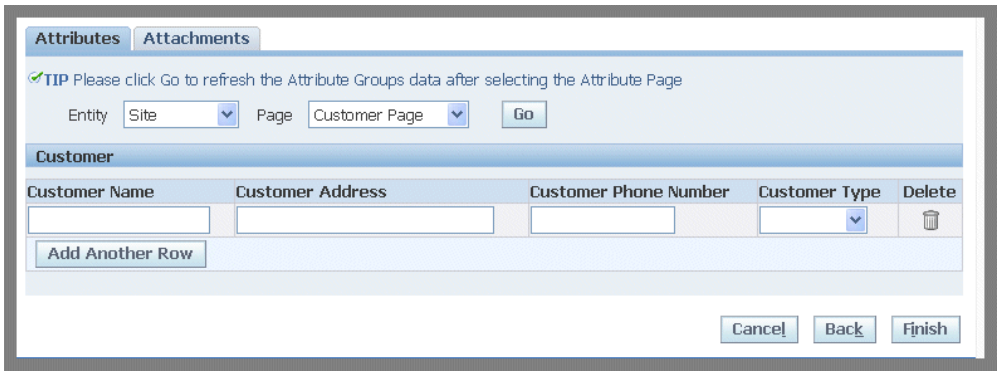
    In the Create Site: Detail Information page—you can add attribute and attachment information to the site record.

14. In the Attributes tab—if attribute pages have been created—you can add details to those pages for this site. Select an entity type in the Entity box, and the page name in the Page box.

    See: Site, Location, and Trade Area Attributes, page 4-3



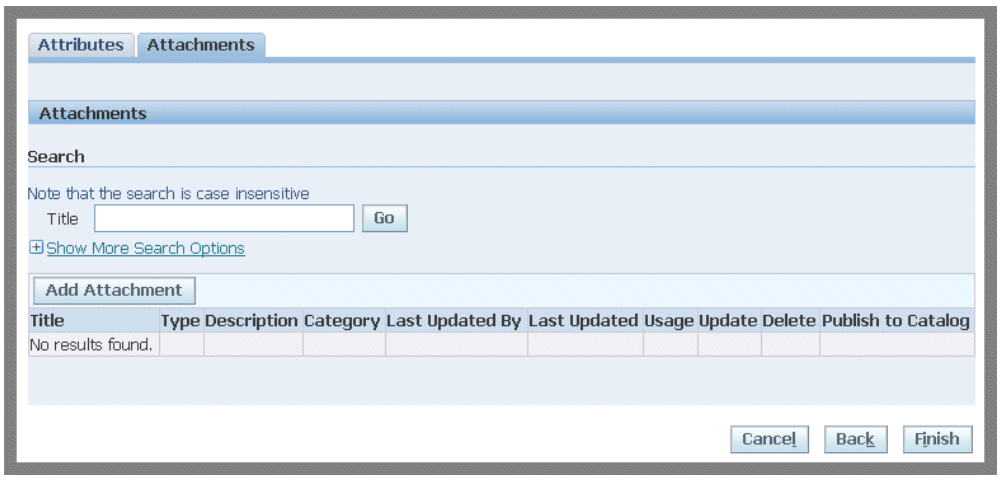

15. Choose Go to display the attribute page, and enter the appropriate information.




16. Select the Attachments tab to add documents, URLs, text, and other attachments pertaining to this site.

    Search for records by selecting a value in the Title field. You can also use search criteria for values in the following fields: Description, Last Updated By, Last Update Date, Type, and Usage.

17. Select Add Attachment to navigate to the Add Attachment page to add files, URLs, or text. See: Using Attachments, *Oracle E-Business Suite User's Guide*




18. Select Finish to save your record.

### To create a new site by copying an existing site:

1. Navigate to the Create Site page.

2. Select the Copy an Existing Site method, and select the site name in the list of values box.

3. Select Create to display the Create Site: Basic Information page.

If profile option RRS: Auto Default Site Number is set to Yes, the next number in the sequence appears. You can change the defaulted value to any unique value.

4. Values from the original site appear on this page. You must enter a unique value in the Name field.

   You can use the default values or change information in the following fields: Type, Status, Brand Name, Calendar, and Legal Entity.

5. In the Primary Address region, select a value for address Source:

   - New: Displays the fields for entering an address.
   - Existing: Displays a search box to select an existing address in the Site Hub data.

6. If you choose Existing, enter a search value to display existing records to select.

   Your selection appears in the Primary Address region.

7. If you choose New, select a value in the Country field.

   For new addresses, you have the option to enter values in either the address lines or in the Geocode Source fields.

8. For address lines, enter data in the following fields:

   - Address Line 1- 4
   - City
   - County
   - State
   - Postal Code

9. Optionally, you can use values in the Geocode Source fields to generate the geodetic coordinates for the site, instead of the address values. The default for this field is set in the profile option: RRS: Default Geocoding Preference:

   - System Generated: The Geocoder program is automatically launched when the site record is saved, and uses the address fields to find geodetic coordinates.
   - User Entered: Geocoder program uses the longitude and latitude values entered in the site record to find geodetic coordinates, and the program is manually launched to find the geodetic coordinates.

10. If you select User Entered in the Geocode Source field, enter values in the

Longitude and Latitude fields.

These fields are disabled if you selected the System Generated Geocode Source. Enter the values in decimal format.

> **Note:** Use the same values for multiple sites at the same address.

11. Use or change the defaulted values in the Site Purpose region. Select Add Purpose to select a new record.

    Purposes specify the function used for the site and must have an active status in Trading Community Architecture (TCA).

    If you select more than one purpose, designate one record as your primary purpose by selecting Set as Primary.

12. You have the option to Select Attributes Groups for Copy. This enables you to copy available attribute groups based the purpose and country specified.

    See: Copying Attribute Groups, page 5-34

13. Select Save to save your record; or select Continue to add detail information.

    In the Create Site: Detail Information page— you can add attribute and attachment information to the site record.

14. In the Attributes tab—if attribute pages have been created—you can add details to those pages for this site. Select an entity type in the Entity box, and the page name in the Page box.

    See: Site, Location, and Trade Area Attributes, page 4-3

15. Choose Go to display the attribute page, and enter the appropriate information.

16. Select the Attachments tab to add documents, URLs, text, and other items pertaining to this site.

    Search for records by selecting a value in the Title field or entering criteria for Description, Last Updated By, Last Update Date, Type, and Usage.

17. Select Add Attachment to navigate to the Add Attachment page to add files, URLs, or text. See: Using Attachments, *Oracle E-Business Suite User's Guide*

18. Select Finish to save your record.

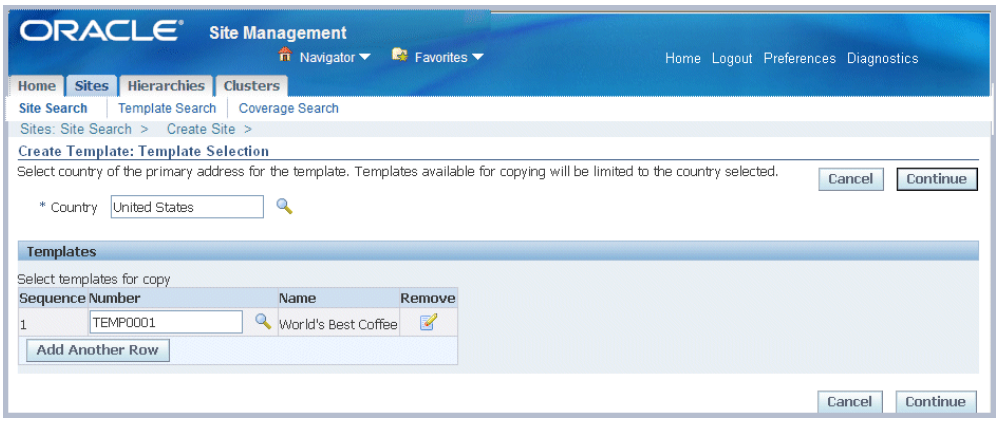
### To create a new site using a template:

1. Navigate to the Create Site page.

2. Select the Create from Existing Templates method.

3. Select Create to display the Create Template: Template Selection page.

4. Select a Country value for the primary address of the template. The functionality for templates is limited to the country selected.




5. In the Templates region, select Add Another Row, and the search the list of values in the Number field for template records.

6. Select Continue to display the Create Site: Basic Information page.

7. The template values appear on this page. Enter values in the Name and Number fields.

   If profile option RRS: Auto Default Site Number is set to Yes, the next number in the sequence appears. You can change the defaulted value to any unique value.

   You can use the default values or change information in the following fields: Type, Status, Brand Name, Calendar, and Legal Entity.

8. In the Primary Address region, select a value for address Source:

   - New: Displays the fields for entering an address.
   - Existing: Displays a search box to select an existing address in the Site Hub data.

9. If you choose Existing, enter a search value to display existing records to select.

   Your selection appears in the Primary Address region.

10. If you choose New, you can change the value in the Country field.

    For new addresses, you have the option to enter values in either the address lines or in the Geocode Source fields.

11. For address lines, enter data in the following fields:

- Address Line 1- 4
- City
- County
- State
- Postal Code

12. Optionally, you can use values in the Geocode Source fields to generate the geodetic coordinates for the site, instead of the address values. The default for this field is set in the profile option: RRS: Default Geocoding Preference:

    - System Generated: The Geocoder program is automatically launched when the site record is saved, and uses the address fields to find geodetic coordinates.
    - User Entered: Geocoder program uses the longitude and latitude values entered in the site record to find geodetic coordinates, and the program is manually launched to find the geodetic coordinates.

13. If you select User Entered in the Geocode Source field, enter values in the Longitude and Latitude fields.

    These fields are disabled if you selected the System Generated Geocode Source. Enter the values in decimal format.

    **Note:** Use the same values for multiple sites at the same address.

14. In the Site Purpose region, use the defaulted value or select Add Purpose to set a purpose for this site.

    If you select more than one purpose, designate one record as your primary purpose by selecting Set as Primary.

15. You have the option to Select Attributes Groups for Copy. This enables you to copy available attribute groups based the purpose and country specified.

    See: Copying Attribute Groups, page 5-34

16. Select Save to save your record; or select Continue to add detail information.

    In the Create Site: Detail Information page— you can add attribute and attachment information to the site record.

17. In the Attributes tab—if attribute pages have been created—you can add details to those pages for this site. Select an entity type in the Entity box, and the page name in the Page box.

See: Site, Location, and Trade Area Attributes, page 4-3

18. Choose Go to display the attribute page, and enter the appropriate information.

19. Select the Attachments tab to add documents, URLs, text, and other attachments pertaining to this site.

    Search for records by selecting a value in the Title field or entering criteria for Description, Last Updated By, Last Update Date, Type, and Usage.

20. Select Add Attachment to navigate to the Add Attachment page to add files, URLs, or text. See: Using Attachments, *Oracle E-Business Suite User's Guide*

21. Select Finish to save your record.

    See: Viewing and Creating Site Templates, page 5-40

### To create a new site by drawing on a map:

1. Navigate to the Create Site page.

2. Select the Draw Site on Google Map method, and then select Create.

   Geofencing enables you to dynamically create polygon geometry sites by dragging and clicking on the map. Polygon site locations are used to define coverage areas for particularly businesses. See: Creating Geofence Map Zones, page 6-17

## Creating Sites Using Export and Import Function

Web Applications Desktop Integrator (Web ADI) is a self-service Oracle Application. Web ADI generates Microsoft Excel or Word documents on your desktop, and downloads the data you have selected from the application to be viewed, or modified and uploaded. It can be used to load legacy data.

**Export and Import Setup**

1. Set profile option BNE_ALLOW_NO_SECURITY_RULE to Yes at the User level.

2. Set profile option EGO: Enable exporting to Excel to use the export and import functionality.

3. If you are using Microsoft Excel 2003 or higher, you may need to change security settings to render the spreadsheet, see: Changing Security Settings, page 5-25

4. If the RRS: Auto Default Site Number profile is enabled, for records with identical values in the Site Name field, the following occurs for site creation using the import function:

   - Only one Site Number is assigned to all records with identical Site Names using

Single-Row attribute groups.

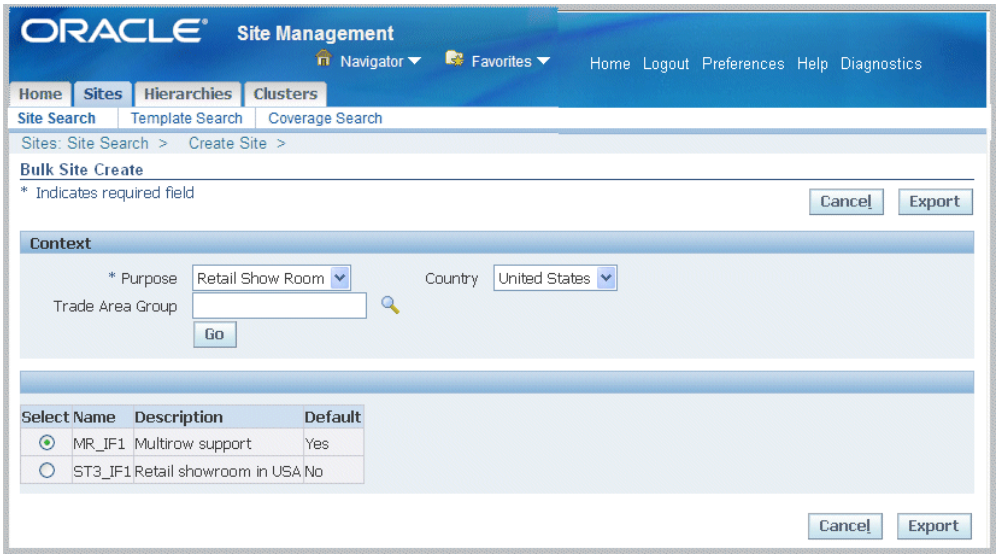
- Multiple Site Numbers are assigned to records with identical Site Names using Multi-Row attribute groups.

### To create new sites by using the export and import function for a spreadsheet

1. Navigate to the Create Site page.

2. Select the Create a Spreadsheet for Site Import method.

3. Select Create to display the Create Template: Template Selection page.




4. In the Context region, select a site Purpose value. Optionally, you can further define your search by selecting values in the Country and Trade Area Group fields.

   **Tip:** It is good practice to have a value in the Country field because import formats require addresses for sites.

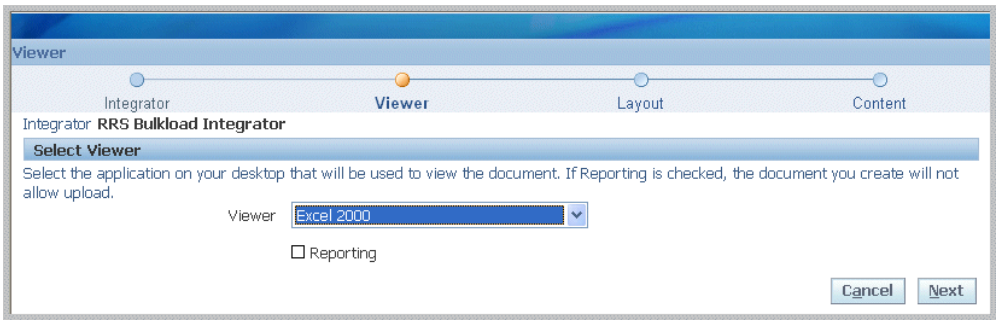
5. Select Go to display available import formats for exporting records to a spreadsheet.

   The import format identifies the specific site purpose imported records inherit, and the attribute groups defined for that purpose. See: Setting Import Formats, page 4-58

6. Choose a record in the table, and select Export to display the Viewer page.

7. In the View box, select a Microsoft Excel spreadsheet version for exporting your records.

If you enable the Reporting check box, the document created cannot be uploaded back to the Site Hub application.



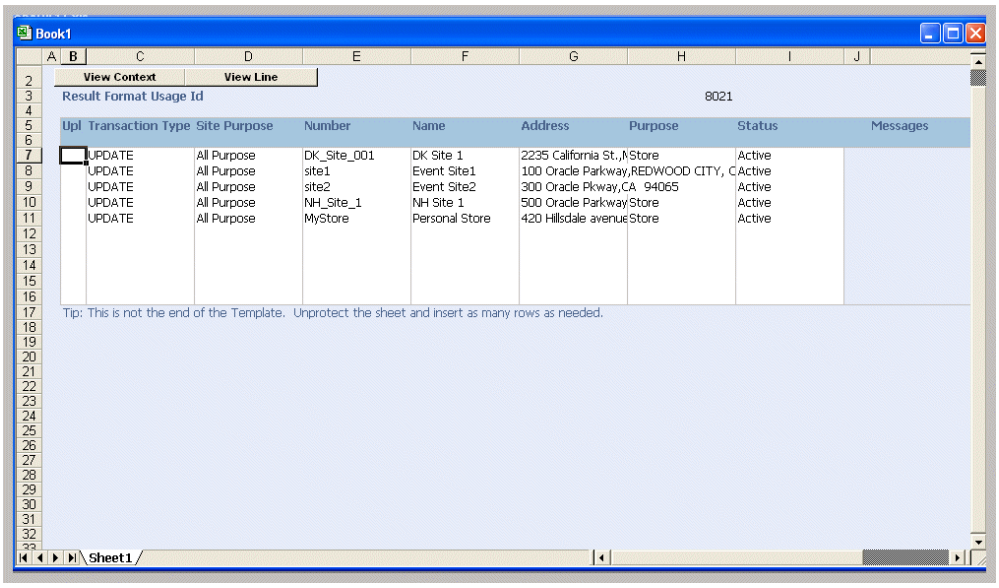

8. Select Next.

   An informational message appears about downloading the file. The File Download dialog box appears prompting you to open or download the file to your desktop.

9. Select Open.

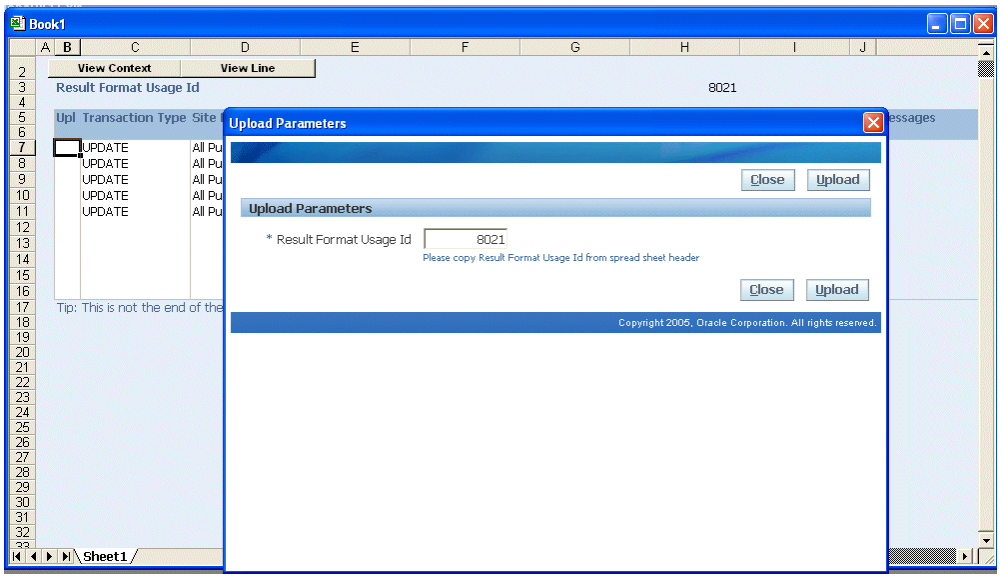
   A processing message appears as the file is downloaded, and then a confirmation message when the download is successful.

10. Enter new records or update records in the Microsoft Excel spreadsheet.




11. To upload the records into Site Hub when your data entry is complete, select the Oracle menu option and choose the Upload option.

12. Enter the Result Format Usage Id value appearing on the spreadsheet into the Upload Parameters dialog box field.




13. Select Upload.

    A confirmation message appears with the number of rows successfully uploaded and the concurrent request number. The spreadsheet denotes the uploaded information in the Messages column with an icon.

## Changing Security Settings

You may need to change the security settings to render Microsoft Excel 2003 or a higher spreadsheet versions.

Change your settings if the Microsoft Excel spreadsheet does not appear, or you receive the following message: *Method VBProject of object_Workbook failed.*

### To change security settings

1. In Microsoft Excel, navigate to the Options dialog box by selecting the Tools menu and choosing Options.
2. In the Options dialog box select the Security tabbed region, and choose Macro Security.
3. In the Security dialog box, select the Trusted Publishers tabbed region.
4. Enable the Trust access to Visual Basic Project check box.
5. Choose OK to save your settings on the Security dialog box.
6. Choose OK on the Options dialog box.

## Updating Site Records

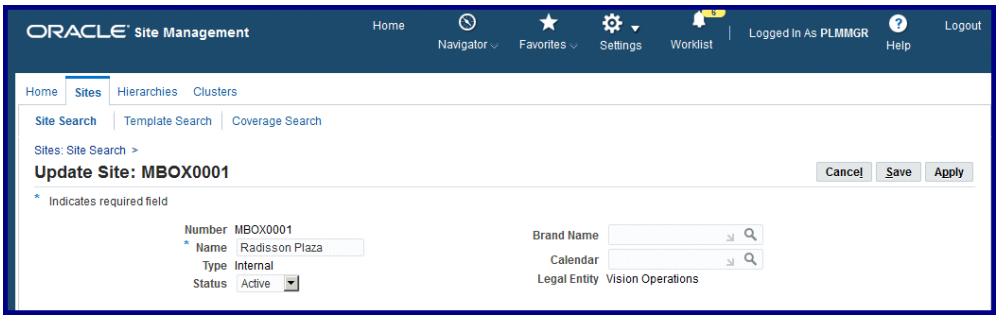
As your business evolves, site properties can change. Site Hub enables changes to existing sites to reflect business changes for basic information, site purposes, attributes, attachments, associations, contacts, and assets. Some of the regions only appear if there is an association with other applications such as Oracle Property Manager, Oracle Trading Community Architecture (TCA), and Oracle Enterprise Asset Management (eAM).

### To update an existing site record:

1. Navigate to the Update Site page.

2. Select applicable information to change in the Name, Status, Brand Name, and Calendar fields

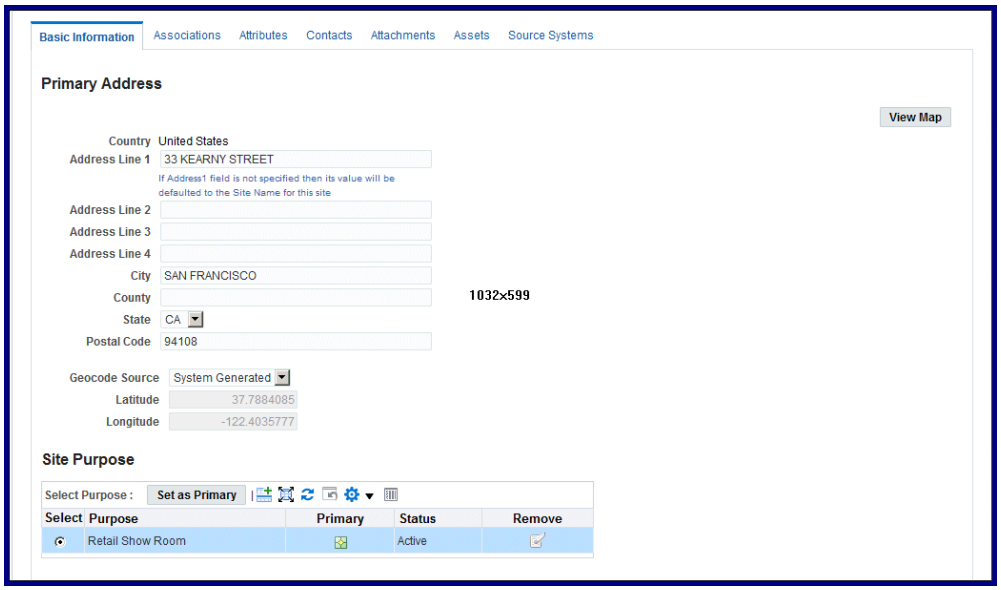
   **Note:** You cannot change values in the Number, Type, or Legal Entity fields on an existing record.




3. Select the Basic Information tabbed region to modify details in the Address region.

   **Note:** You cannot change the Country field value entered on the original record.

   Select View Map to view site details on a map, see: Viewing Site Map Details, page 6-8




4. Select the Site Purpose region to:
   - Add new purposes to this site.
   - Change a record to primary purpose.
   - Change the status for any of the purpose records.

     Existing purposes assigned to the original site record cannot be deleted but can be set to the Inactive status.

5. Select Apply to save your work.

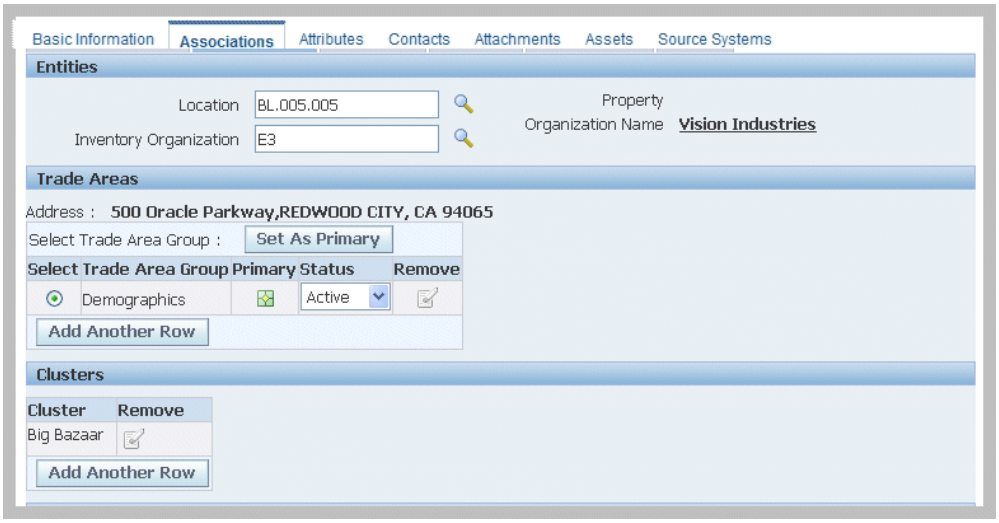
6. Select the Associations tabbed region to edit information in the follow areas: Entities, Trade Areas, Cluster, Hierarchies, and Relationships. Some regions appear depending on the values entered when the record was created.
   - The Entities and Relationship sections appear if a legal entity is specified.
   - Location information appears if a location is associated with Oracle Property Manager records.
   - If Oracle Trading Community Architecture is used to capture customer relationships, you can select values in the Relationships section.

7. In the Entities region you can:
   - Associate existing property location values to your site by selecting a value in the Location field.

When a location is associated to the site, you can select the Property link to navigate to the Locations Inquiry window in Oracle Property Manager to view location information.

- Associate an Inventory Organization value to the site.

  When an Oracle Inventory Organization is associated to the site, you can select the Organization Name link to navigate to the Organization Parameters window, see: Defining Default Inventory Parameters, *Oracle Inventory User's Guide*

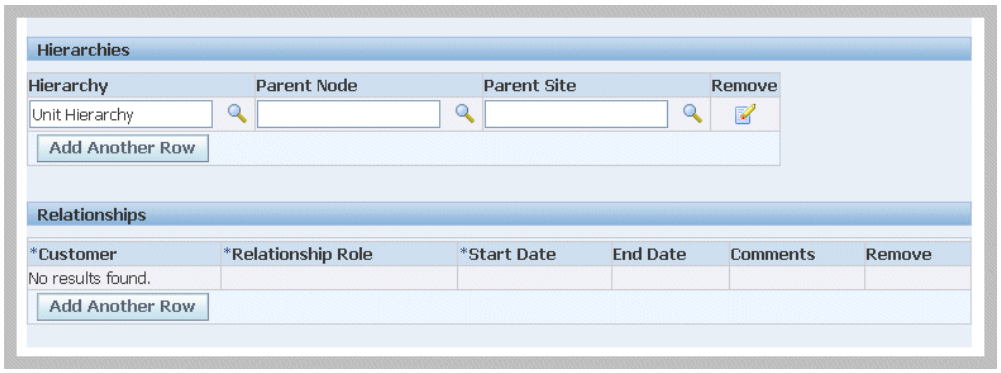



8. Select the Trade Areas region to modify trade area group details including:
   - Adding new trade area groups to this site
   - Changing the primary position for the records
   - Changing the status for any of the trade area groups

     **Note:** Existing trade areas assigned to the original site record cannot be deleted, but can be set to the Inactive status.

9. In the Clusters and Hierarchies regions, you can add new records by selecting Add Another Row.
   - In the Cluster region, add a valid value in the Cluster field.
   - In the Hierarchies region, add valid values in the Hierarchy, Parent Node, and Parent Site fields.

**Note:** You cannot delete existing clusters and hierarchies, but can inactivate the dates on the records. See: Viewing Site Hierarchies, page 7-6, and Viewing and Creating Site Clusters, page 5-37




10. The Relationships region displays customer and relationship information for the site. Select or remove values in the fields for:

    - Customer
    - Relationship Role (such as affiliate or competitor)
    - Start and End Dates
    - Comments

    For more information see: Party Relationship Management Process, *Oracle Trading Community Architecture User Guide*

11. Select Apply to save your work.

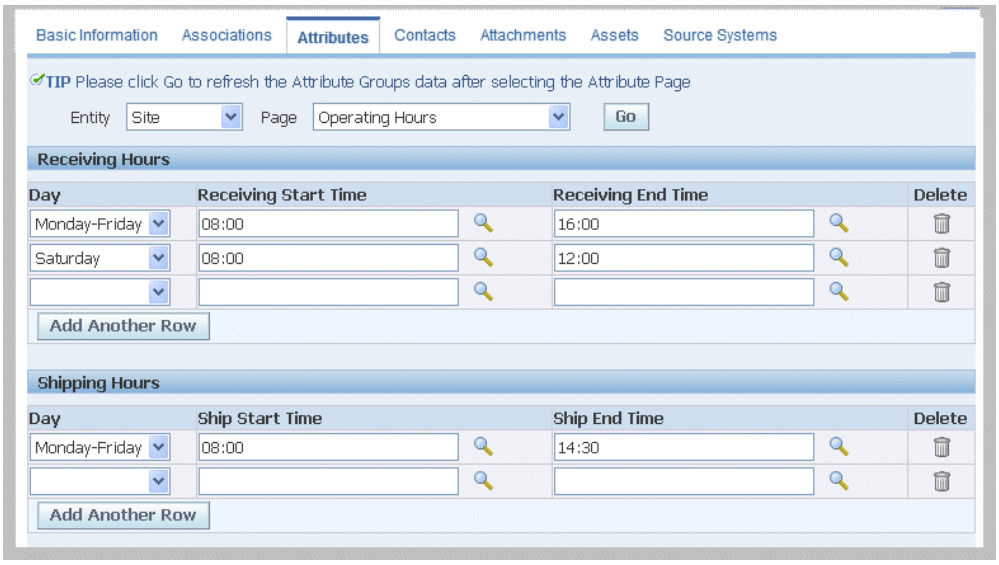
12. Select the Attributes tabbed region to modify details for attribute pages. Select a value in the Entity box—choices are Site, Location, or Trade Area.

13. Choose a value in the Page box.


14. Select Go to display the page as defined in the attribute groups and attribute pages.

15. Enter the appropriate information for the Attribute Page.

See: Site, Location, and Trade Area Attributes, page 4-3



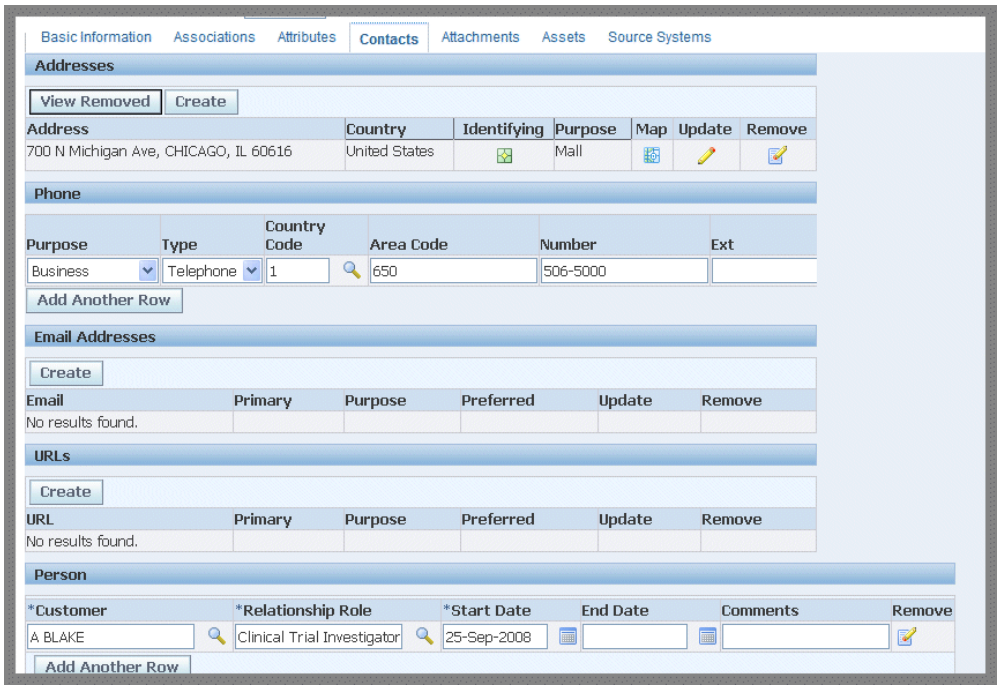

16. Select the Contacts tabbed region to add or modify street addresses, E-mail addresses, and other personal contact information.

    This tabbed region appears if a legal entity is specified. Trading Community Architecture is used to capture the definitions of parties, party sites, party relationships, and contacts for Site Hub records. See: Party Relationship Management Process, *Oracle Trading Community Architecture User Guide*

17. Select the Address region to modify site address details.

    The values in the Address, Country, and Purpose fields appear from the data entered on the Basic Information page. If this address is used a the default address for search criteria as set up in TCA, an Identifying icon appears. You can perform the following actions in the section by choosing:

    - View Removed to navigate to the Contacts: View Removed Addresses page. This page displays old addresses that were associated with the site in the past, but have been removed.
    - Create to navigate to the Contacts: Create Address page to create another address.
    - Map to view the Site Map page for this site, see: Viewing Site Map Details, page 6-8
    - Update to navigate to the Contacts: Update Address to modify the address.




18. Select the Phone region to add, update, or remove phone number details including:
    - Purpose—such as business, home, or emergency
    - Type—such as telephone, mobile, or fax machine
    - Country Code
    - Area Code
    - Number
    - Extension

19. Select the Email Addresses region to add, update, or remove e-mail addresses. Details display in fields for Email, Primary, Purpose, and Preferred.

20. Select Create to navigate to the Contacts: Create Email Address page to add new e-mail records. Select information in the following fields:
    - Purpose—such as business, emergency, or personal
    - Format—choices are HTML mail, Plain text mail, and Text mail with HTML attachment
    - Email—the unique e-mail address

- Status—choices are Active or Inactive
- Primary—flag indicating if this is the primary e-mail address

21. Select the URL region to add, update, or remove website addresses. Details display in fields for URL, Primary, Purpose, and Preferred.

22. Select Create to navigate to the Contacts: Create Website page to add new website address records. Select information in the following fields:
    - Purpose—such as Homepage or Support
    - Format—such as Hypertext Transfer Protocol or E-mail
    - URL—Uniform Resource Locator specifying identified resource and the protocol for retrieving it
    - Status—choices are Active or Inactive
    - Primary—flag indicating if this is the primary website address

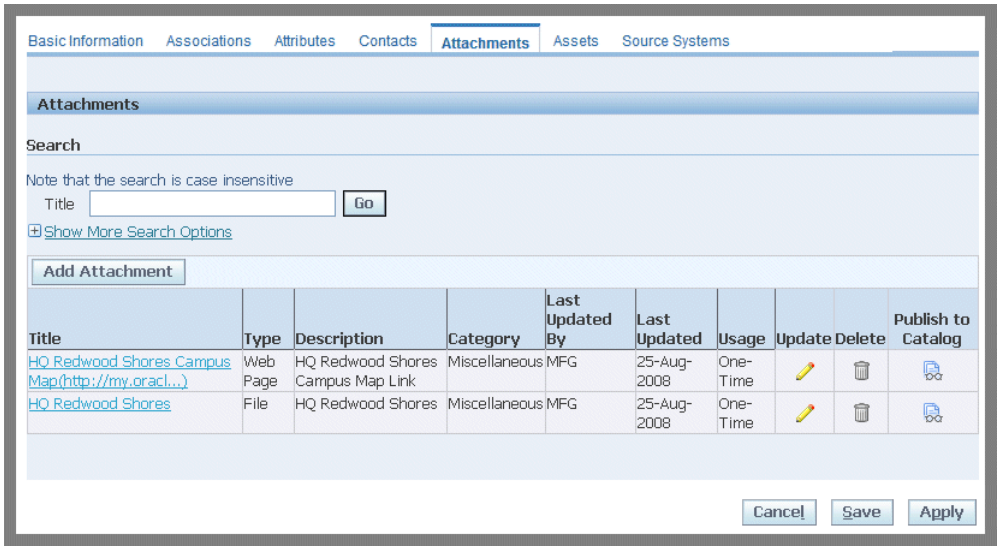
23. Select the Person region to add, update, or remove customer contact information that is stored in your TCA application. The following fields display and can be modified:
    - Customer
    - Relationship Role
    - Start and End Dates

24. Select Apply to save your work.

25. Select the Attachments tabbed region to add or modify attachment records for this site.

    This region provides the ability to display attached documents, URLs, text, and other items pertaining to this site—and enables you to select:
    - Criteria in the Search region to filter the list of attachments
    - Add Attachment to navigate to the Add Attachment to add more records, see: Using Attachments, *Oracle Applications User's Guide*
    - The record in the Title field to open the attachment
    - Update to navigate to the Update Attachment: page to modify details

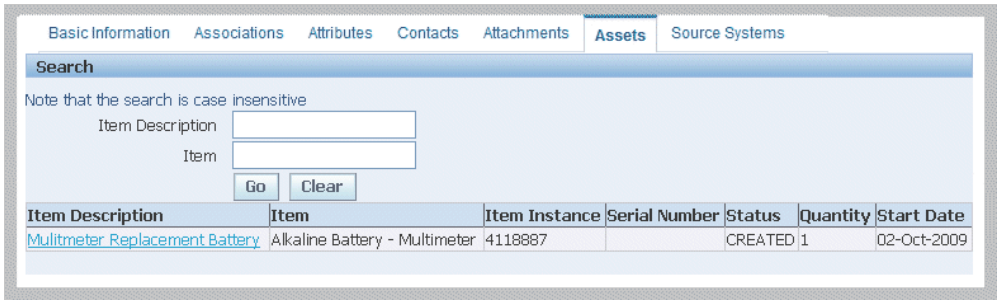
- Delete to remove the record
- Publish to Catalog icons to publish to the document catalog as a standard type document




26. Select Apply to save your work.

27. Select the Assets tabbed region to view asset records for this site.

    This region is visible for internal sites, with an assigned legal entity, and if you are using eAM Asset instances. Details display in the following fields: Item Description. Item, Item Instance, Serial Number, Status, Quantity, and Start Date.




    To update values in this region, see: Creating Site Assets, page 5-46

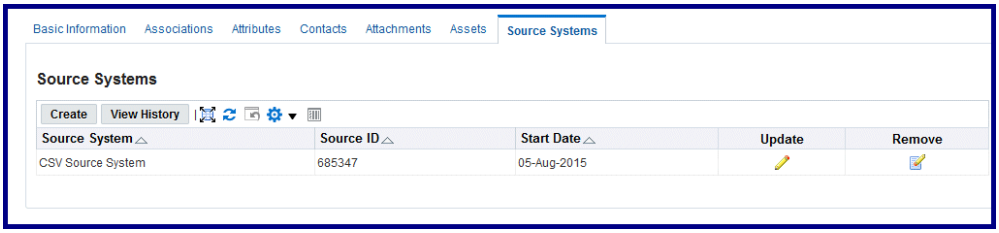
28. Select the Source Systems tabbed region to create, maintain, and import source system functionality from Oracle Trading Community Architecture (TCA).

    When a Legal Entity is associated with a site, corresponding Party and Party Site entities are created for the site. This enables Site Hub to leverage the existing source system management functionality from TCA.

Oracle Trading Community Architecture is a data model for managing complex information of the network of hierarchical relationships. Source System Management maintains references between the TCA Registry and any defined source system records such as the Party or Party Site.

See: Source System Management Overview, *Oracle Trading Community Architecture Administration Guide*

29. For records associated with this site, the following information is listed:
    - Source System: Definition value used to track a record in the TCA Registry and its data sources.
    - Source ID: Unique value used to map this record in the Registry ID of the TCA record, such as the party or contact point.
    - Start Date: The date this record becomes active.




30. Select Create to enter a new source system record. Enter the values for Source System, Source ID, and Start Date.
31. Save your work.
32. Select View History to render the View Source System History page to display previous associated source systems mapping details for this site. The table lists the following values:
    - Source System
    - Source ID
    - Start and End Date ranges
    - Reason for Removal

## Copying Attribute Groups

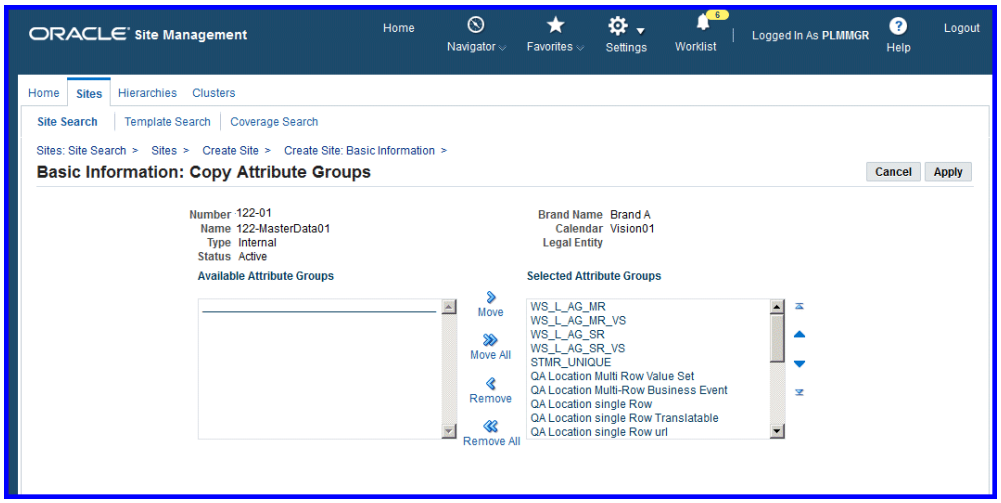
When you are creating new sites from existing sites (copying, templates, or importing), you can copy attribute groups by choosing Select Attribute Groups for Copy from the

Site Creation: Basic Information page. All available attributes groups from the selected templates, based on the purpose and country specified, are listed on this page.

### To copy attribute groups:

1. Navigate to the Basic Information: Copy Attributes page.

   You must first enter the required fields on the Site Creation: Basic Information page to display this page.




2. By default, all available attribute groups are enabled for copying in the Selected Attribute Groups box. Use the Arrow tools to move or remove records between the Available and Selected boxes.

3. Select Apply to save your work. The Site Creation: Basic Information page is refreshed.

## Comparing Sites

Site Hub enables you to analyze multiple sites side by side—comparing attribute pages for site, location, or trade area group entities. The information displayed can aid in examining and comparing site productivity and competitor data.

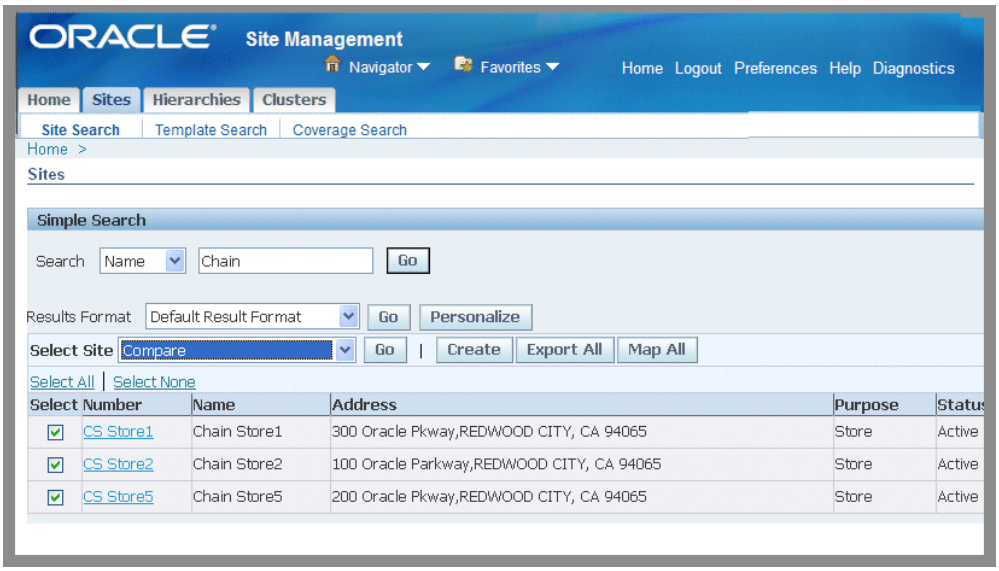
### To compare two or more sites:

1. Navigate to the Search page, and set your search criteria.

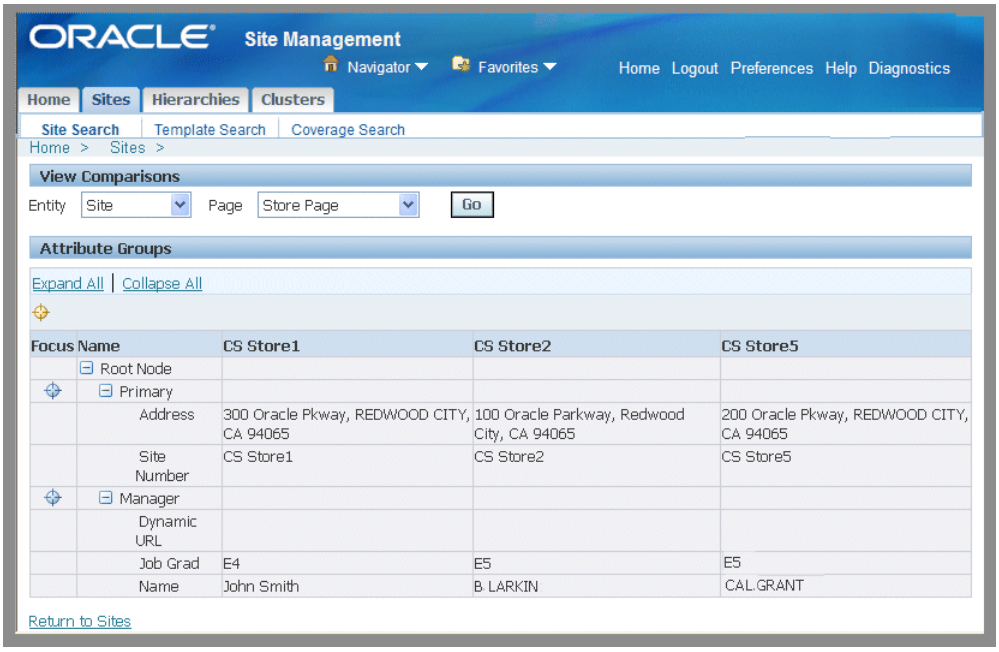
   You can select records from either the Simple Search or Advanced Search pages, see: Searching for Information, page 5-3

2. Select the appropriate records from the results of your search, and select Compare in the Select Site box.

You must select at least two records, and can select up to 5 site records.




3. Select Go to display the View Comparisons page.




4. In the View Comparisons region, select a value in the Entity field. Your choices are Site, Location, and Trade Area.

5. Select a record in the Page field for the pages created for the entities.

6. Select Go to display the attribute values for each site record. The attributes are

displayed in a table on this page.

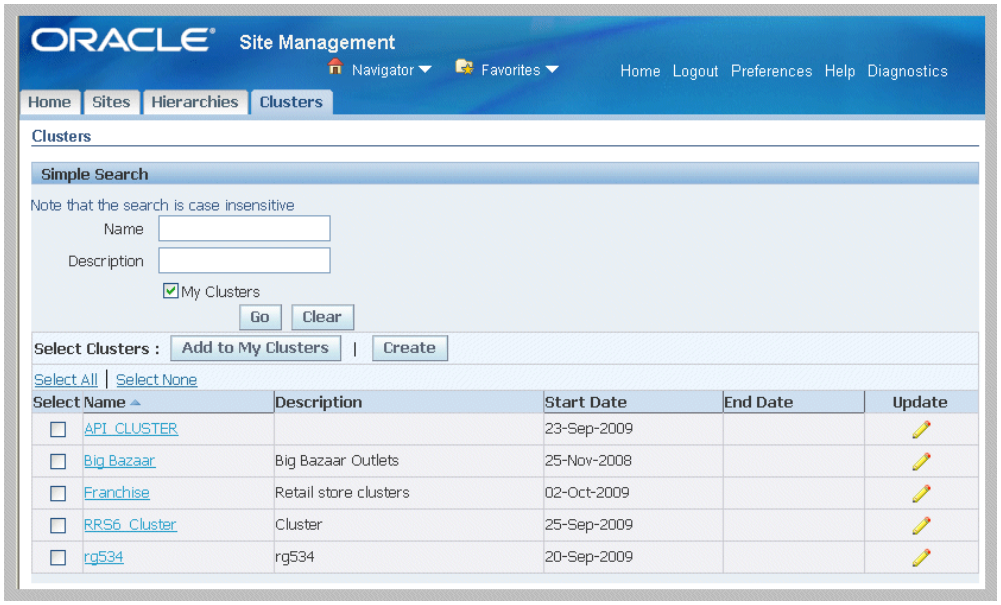
## Viewing and Creating Site Clusters

Site Hub provides the ability to group sites with shared characteristics into clusters, in a grouping at one level only. For example, you can create a cluster of sites with a specific annual revenue range and size. You have the ability to add site records as you create and modify a cluster record. You can also access the Add to Cluster page to add sites directly from the Simple Search and Advanced Search pages.

> **Note:** If role based access security is implemented, users must have view privilege in order to view and add sites to cluster records.

### To view existing site clusters:

1. Navigate to the Clusters page.
2. In the Simple Search region, you have the choice to search for records using Name and Description criteria. You can also enable the My Clusters check box to display records selected in the Manage My Clusters page under your login information.
3. Select Go to display the results in the table.




This page enables you to select:

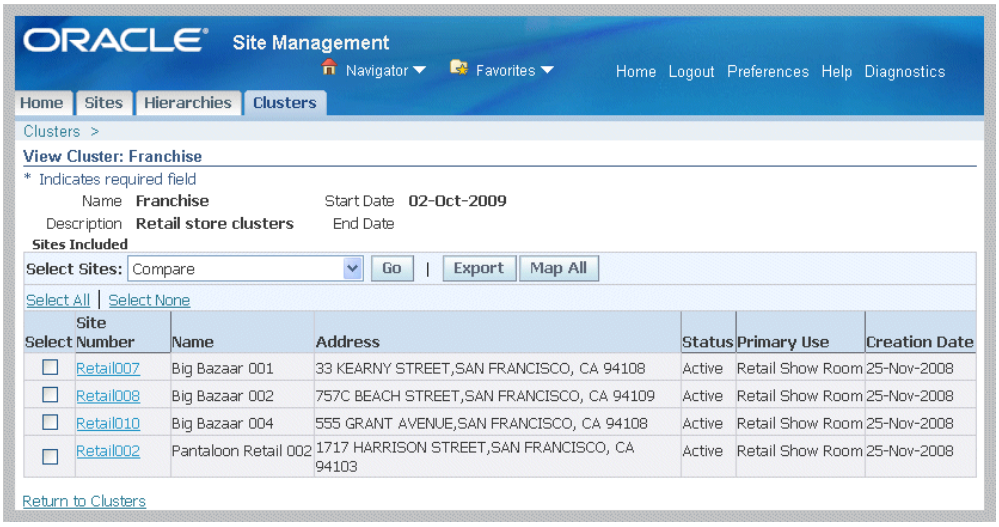
- Add to My Clusters to select records to add to your favorites list

- Create to navigate to the Create Cluster page to create a new record
- A name record to navigate to the View Cluster page
- Update to navigate to the Update Cluster page

4. Select a record in the Name column to display the View Cluster page.

   This page displays information in fields for Name, Description, and Start and End Dates.

   Summary information for the sites attached to this cluster appear in the table in fields for Site Number, Name, Address, Status, Primary Use, and Creation Date.




5. Inclusive for all site records displaying in the table, you can select the following actions:

   - Export to export records to a spreadsheet, see: Creating Sites Using the Export and Import Function, page 5-23
   - Map All to display all sites on the Site Map page, see: Viewing Site Map Details, page 6-8, page 5-10

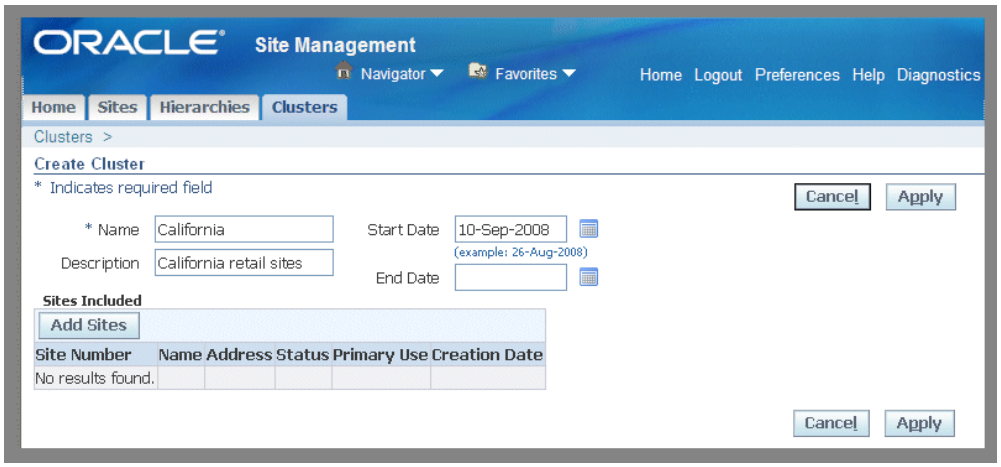
6. Select one or more records in the table to perform the following actions:

   - Compare, see: Comparing Sites, page 5-35
   - Create Asset, see: Creating Site Assets, page 5-46
   - Create Inventory Organization, see: Creating and Assigning Inventory Organizations to Sites, page 5-48

- Create Property Location, see: Creating Property Locations for Sites, page 5-47
- Map Sites, see: Viewing Site Map Details, page 6-8

### To create site clusters:

1. Navigate to the Create Cluster page.
2. Enter a value in the Name field. Optionally; you can enter a value in the Description field.




3. In the Start and End Date fields, you have the option to select dates to activate or inactivate this record.
4. Select Add Sites to access the Sites Search page to add site records to this cluster. Choose the sites you want in this cluster, and select Add.

   They appear in the Sites Included region.
5. Select Apply to save your work.

### To update site cluster records:

1. Navigate to the Update Cluster page for the cluster record selected.

   This page displays cluster name and description values; summary information for associated sites appears in a table.
2. You can modify the site cluster values in any of the following fields:
   - Name
   - Description

- Start and End Dates

3. If there are sites associated with the cluster record, you can remove sites by selecting records in the table, and select Remove from Cluster.

4. Select Add Sites to access the Sites Search page to add site records to this cluster. Choose the sites you want in this cluster, and select Add.

   They appear in the Sites Included region.

5. Select Apply to save your work.

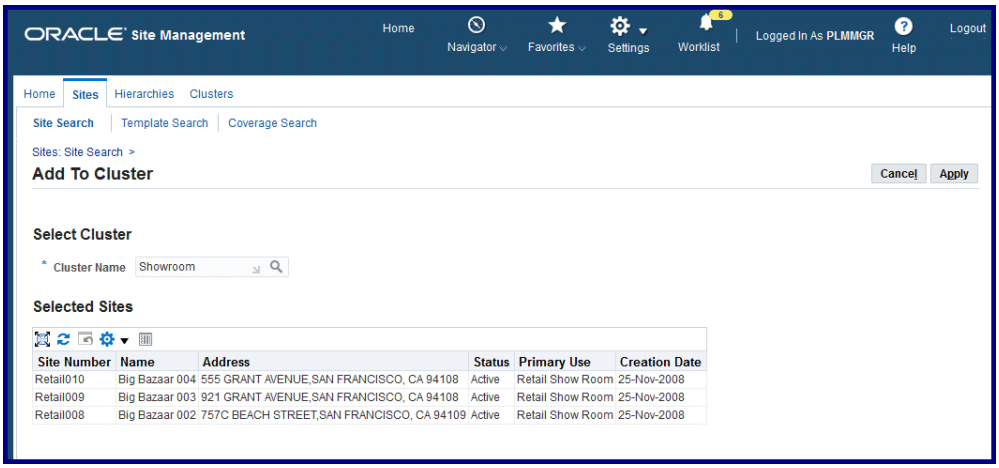
### To add sites to a cluster:

1. Navigate to the Simple Search or Advance Search page, and search for applicable records.

2. Select site records, and choose Add to Cluster in the Actions box.

3. Select Go to display the Add to Cluster page.

   The records selected appear on the page in the Selected Sites region.




4. Select the cluster in the Cluster Name field.

5. Select Apply to save your work.

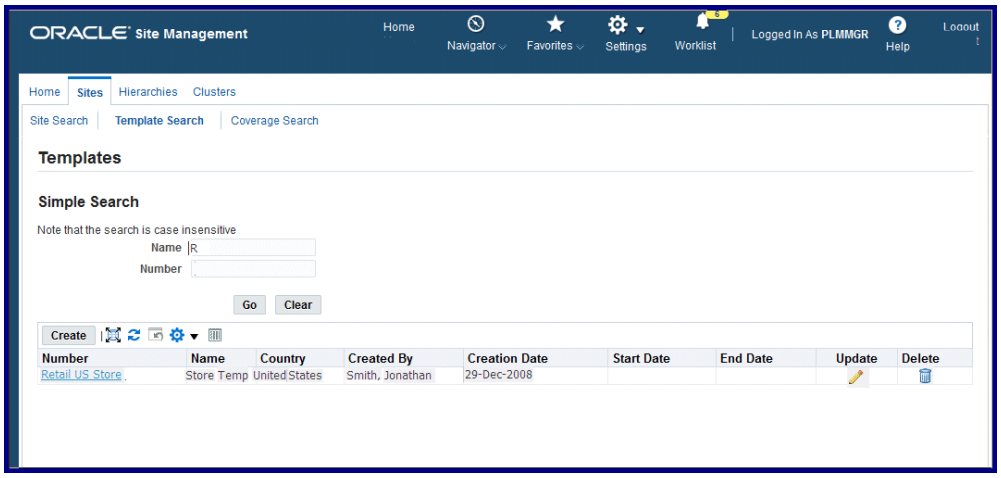
## Viewing and Creating Site Templates

Site templates enable you to create models representing a range of possible site configurations used in site creation. Once created, you can update and modify these templates.

### To view site templates:

1. Navigate to the Templates page.

2. In the Simple Search region, you can search for records using criteria in the Name and Number fields.




3. Select Go.

   The results of your search appear in a table with the following information summary information for each record: Number, Name, Country, Created By, Creation Date, Start and End Dates

   This page enable you to select a record to view, update, or delete the template.

4. Select a record in the Number field to navigate to the View Template page.

   The template information displays in tabbed regions for Basic Information, Attribute Groups, and Attribute pages.

5. You can modify template data by selecting Update for a record.

   Update Template page appears with the template information displaying in the tabbed regions for Basic Information, Attribute Groups, and Attribute pages. Change the appropriate information.

6. Select Apply to save your work.

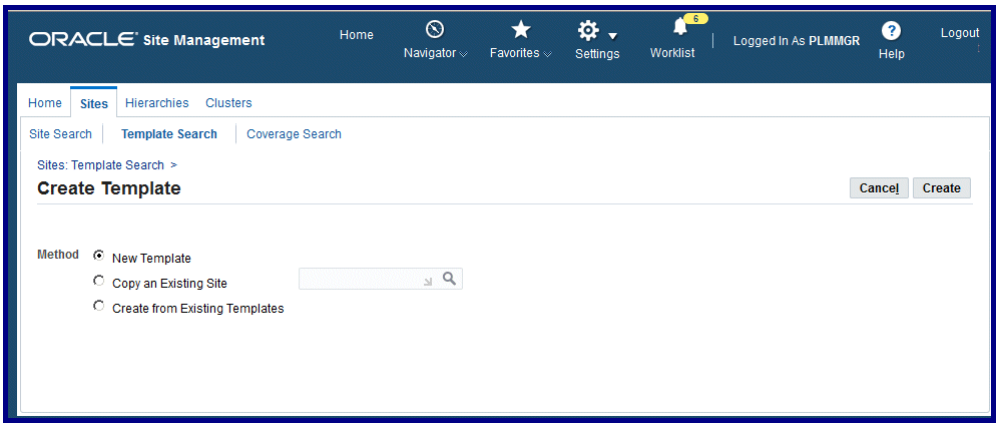
### To create a site template:

1. Navigate to the Templates page.

2. Select Create to display the Create Template page.

   Three methods are provided to create templates: New Template, Copy an Existing

Site, and Create from Existing Templates.




3. Select a method to enter new site details for your template:

   - New Template—displays the Create Template: Basic Information page for entering site details for your template.

   - Copy an Existing Site—displays the Create Template: Basic Information page with details from the site you selected to copy.

   - Create from Existing Templates—displays the create Template: Template Selection page to choose a template for copying information.

4. If you choose either the New Template or Copying an Existing Site methods, select Create.

   The Create Template: Basic Information page appears.

5. If you choose the Create from Existing Templates method, select Create do display the Template: Template Selection page.

   Select a value in the Country field, and Add Another Row in the Templates region. Select a template record from the list values.

   Select Continue to display the Create Template: Basic Information page.

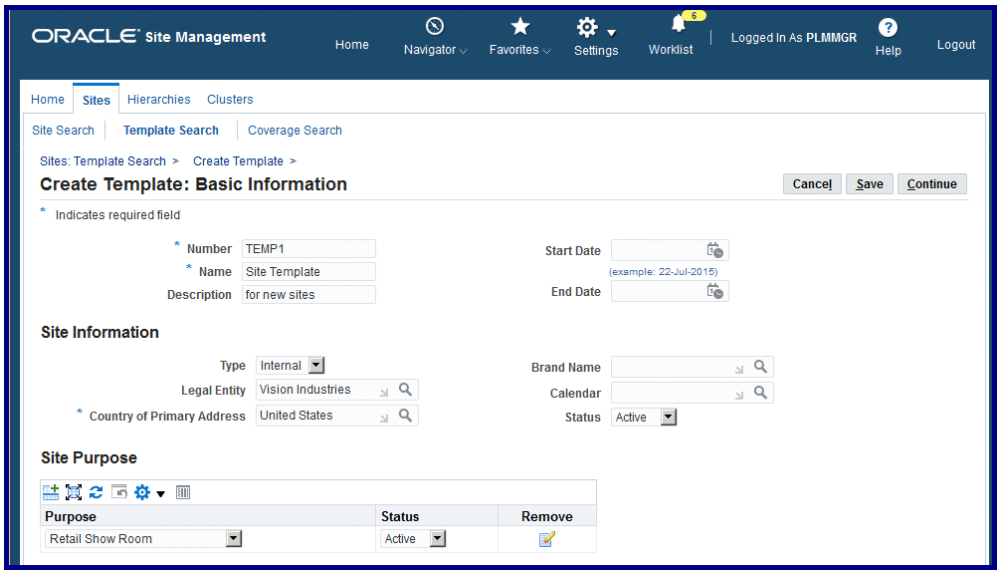
6. Enter unique values for the Name and Number fields, optionally enter data in the Descriptions and Start and End Date fields.

7. In the Site Information region, you must enter or use the defaulted value in the Country of Primary Residence, and optionally you can select details in the following fields:

   - Type

- Legal Entity
- Brand Name
- Calendar
- Country of Primary Address
- Status

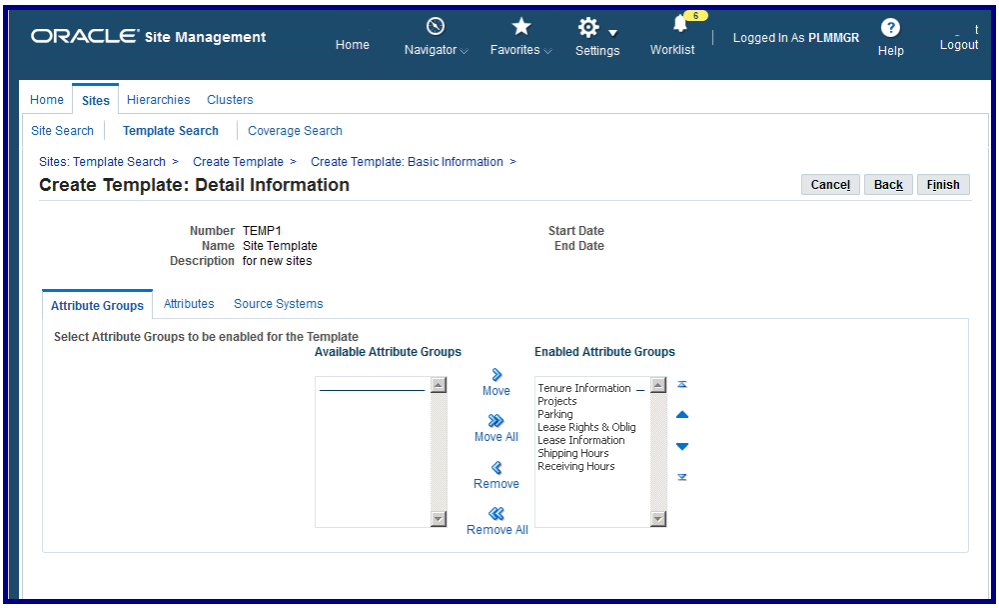
**Note:** For more information about the fields on this page, see: Creating Sites, page 5-11




8. In the Site Purpose region, you can select a purpose for this site to specify the function used for the site. Purposes are required for creating attribute pages.

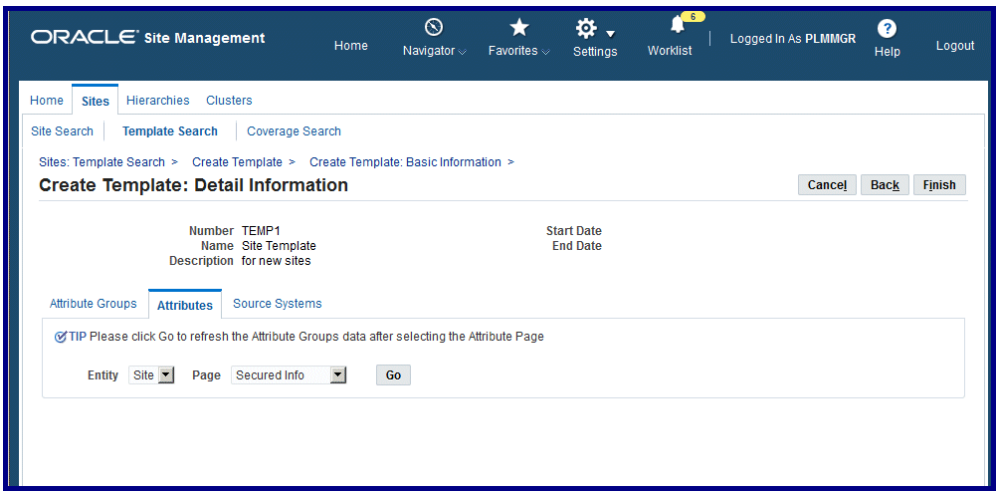
9. Select Save to save your record; or select Continue to add detail information on the Create Template: Detail Information page.

10. If you selected Continue, the Create Template: Detail Information page appears. In the Attributes Group tab, if you added site purpose records and attributes are assigned to those records, they appear in the Available Attributes box.

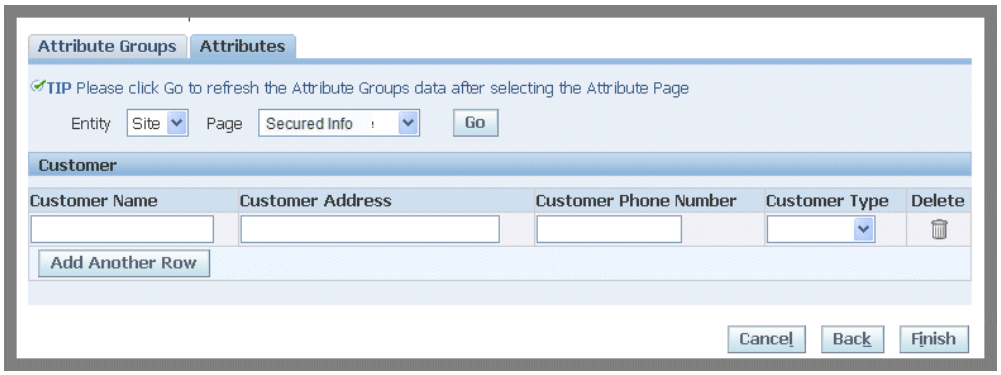



Use the Arrow tools to move or remove records between the Available and Selected boxes. See: Site, Location, and Trade Area Attributes, page 4-3

11. In the Attributes tab—if attribute pages have been created—you can add details to those pages. Select an entity type in the Entity box, and the page name in the Page box.



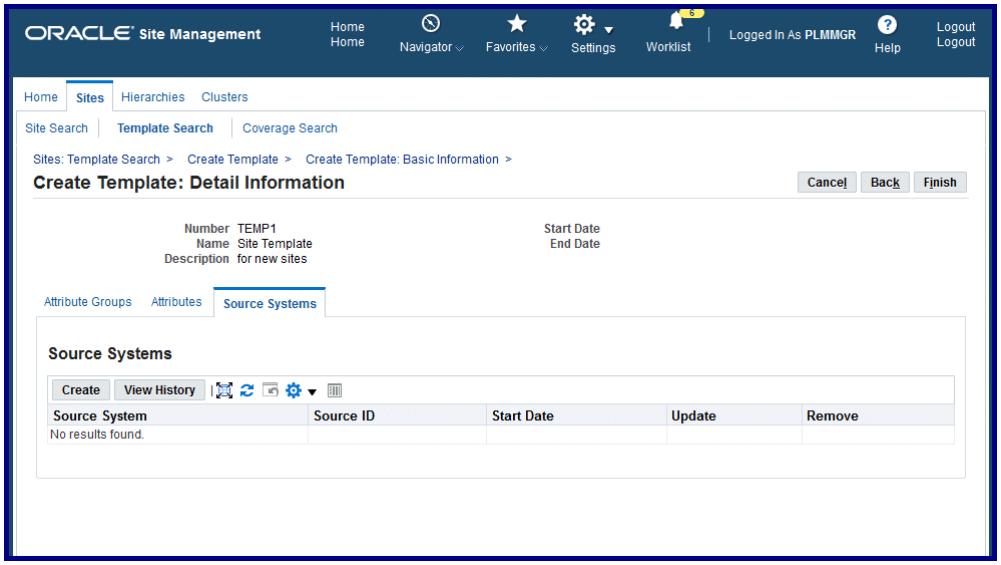

12. Choose Go to display the attribute page, and enter the appropriate information.




13. Select Finish to save your work.

14. In the Source Systems tab—you can use existing source system management functionality from Oracle Trading Community Architecture (TCA) in creating the template.

    If a Legal Entity is associated with a site, corresponding Party and Party Site entities are created for the site. Source System Management maintains these entities between the TCA Registry and any defined source system records. See: Source System Management Overview, *Oracle Trading Community Architecture Administration Guide*




15. Select Create to add source system references to this template, see: Updating Source System references, page 5-33

16. Save your work.

## Creating Site Assets

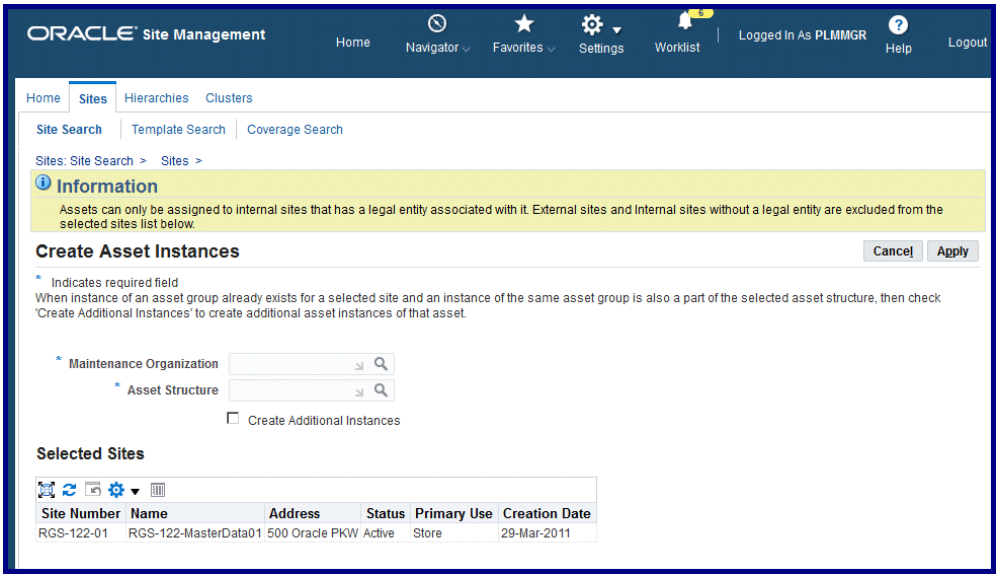
Site Hub provides the ability to associate sites with Oracle Enterprise Asset Management (eAM) assets and equipment. For internal sites with an assigned legal entity—you have the ability to track maintenance, performance, costs, and work history for your site assets. Asset groups enable you to define eAM assets and their characteristics that are inherited by the assets belonging to that group. Assets are visible in the View Site and Update Site pages.

### To add asset instances to your site:

1. On the Sites page, select one or more site records and navigate to the Create Asset Instances page.

2. Select a value in the Maintenance Organization field.

   This field identifies the eAM maintenance organization associated with the production organization.




3. Select a value in the Asset Structure field.

   An asset structure is a hierarchy of the parent asset and its component child assets.

4. Enable the Create Additional Instances check box to create additional asset instances if the specified site has existing assets from the same asset group.

5. Select Apply to save your work.

## Related Topics

Defining Asset Groups, *Oracle Enterprise Asset Management User's Guide*

# Creating Property Locations for Sites

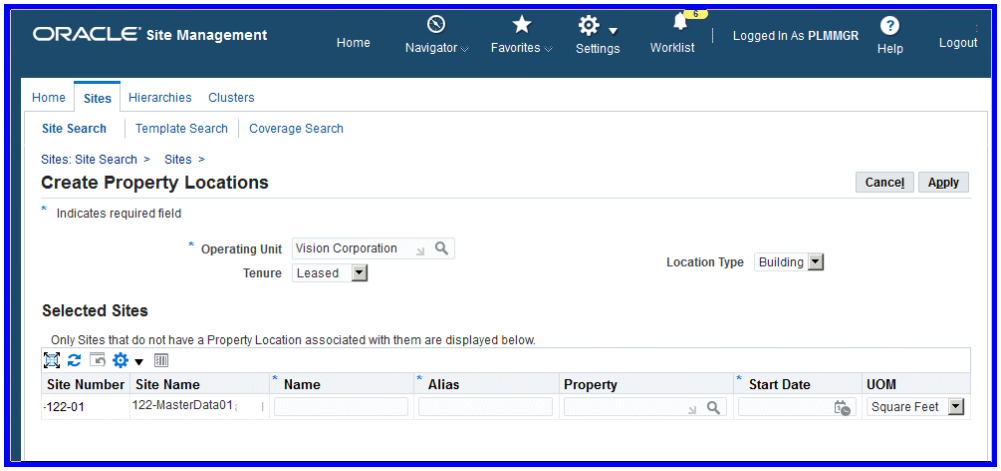
You have the ability to set up property location information for your sites if you have installed Oracle Property Manager, and the site has a legal entity specified. This information appears in the Associations tabbed region of the site record, the Entities section. Location information appears if a site location is associated with Oracle Property Manager records.

### To create property locations for your site records:

1. On the Sites page, select site records and navigate to the Create Property Locations page.

2. Enter a valid record in the Operating Unit field associated to this property.

3. Select a value in the Tenure field for this property. Your choices can include Leased, Managed, Mixed, or Owned.




4. Select a Location Type value. Choices are Building, Floor, Office, Land, Parcel, and Section.

5. Enter values in the Name and Alias fields.

6. Optionally, you can select a Property record and Start Date values.

7. Select a unit of measure for valuating this property, such as square feet or monetary units.

8. Select Apply to save your work.

## Creating and Assigning Inventory Organizations to Sites

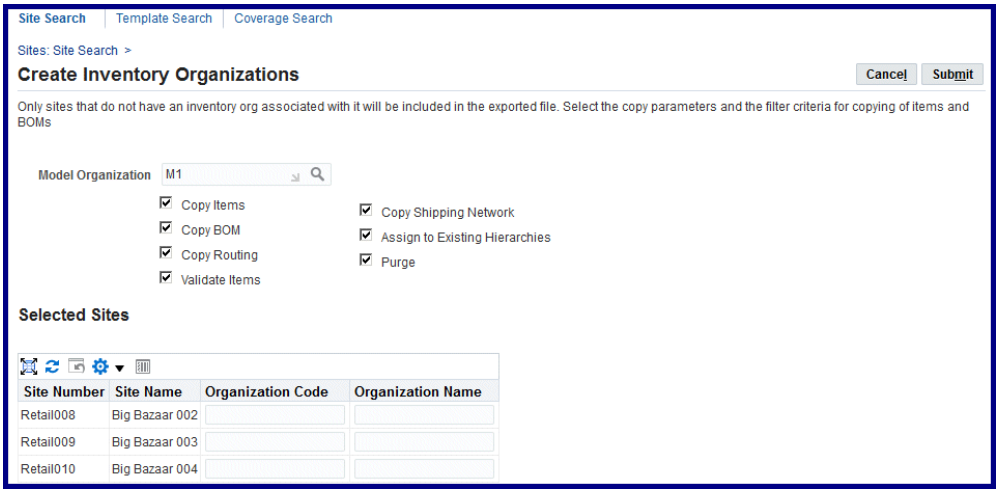
You have the ability to create inventory organizations for the sites by copying the organization definition from a model or existing inventory organization. Existing organization data serves as a template. This also enables you to copy other organization specific data such as shipping networks, hierarchy assignments, bills of material, routings, items and item attributes from the model organization.

### To create an inventory organization for a site:

1. Select site records and navigate to the Create Inventory Organizations page.

   Only selected sites that do not already have an associated inventory organization display in the Selected Site region.

2. Select a valid organization in the Model Organization field.




3. You have the option to copy or modify the following definition elements from the existing organization. Enable or disable the check boxes for the following definitions:

   - Copy Items
   - Copy BOM
   - Copy Routing
   - Validate Items
   - Copy Shipping Network

- Assign to Existing Hierarchies
- Purge

4. For the select sites, enter values in the Organization Code and Organization Name fields.
5. Select Submit to generate new records.

## Related Topics

Copying Inventory Organizations, *Oracle Inventory User's Guide*

# 6

# Site Mapping

This chapter covers the following topics:

- Overview of Site Hub Map Functionality
- Defining Site Map Preferences
- Site Geocoder Program
- Viewing Site Map Details
- Polygon Geometry Visualization
- Searching Coverage Areas

## Overview of Site Hub Map Functionality

Site Hub offers the ability to view sites on a map using Google Maps. The geographic location of sites is an important component of ongoing business processes such as merchandise selection, revenue forecasts, competitive analysis, and marketing. You can also set information such as competitor sites and trade areas. You can set site icons, launch a geocoder program to geocode sites and configure views for visualizing site specific data in Google Maps.

Polygon site capability offers the ability to define a site zone defined by a group of vertices. This feature defines geographic zones businesses and industries such as retail, government, marketing, and insurance areas. Geofencing functionality enables you to dynamically create polygon mapping to connect sites by dragging and clicking on the map directly.

The Administrator role is used to configure the map display in the Map Preferences tabbed region, and access the Geocoder concurrent program used to create the map. The map is viewed from the Sites tab region in the Site user role and provides the following:

- Defining Site Map Preferences, page 6-2
- Site Geocode Program, page 6-6

- Viewing Site Map Details, page 6-8
- Polygon Geometry Visualization, page 6-16

## Defining Site Map Preferences

Site Hub offers the ability to view sites on a map using Google Maps. The geographic location of sites is an important component of ongoing business processes such as merchandise selection, revenue forecasts, competitive analysis, and marketing. You can also set information such as competitor sites and trade areas. The Map Preferences tabbed region consists of two pages: Map Preferences is used to set map icons and window information, and Geocoder is the concurrent program used to create the map.

The Map Preferences tabbed region enables you to:

- Upload images to be displayed as markers for a site purpose, enabling you to easily distinguish sites on a Google Map. These markers can be used for your own sites, competitor sites, potential sites, and different trade areas for the various trade area groups of sites. You have the ability to define areas on the map for point or polygon geometry site purposes:
  - In point geometry, you upload images defining sites on the map.
  - In polygon geometry, you can define the color of the fill area or polygon on the map.
- Upload image files of any file size for icons on the map. Images are automatically sized when uploaded. A default marker is shown if an image is not uploaded and set for display for a site purpose.
- Select attribute pages for a site, location, or trade area group. The pages display for each entity when you select the site on the map. For example:
  - Site entity—set an attribute page for each site purpose
  - Location entity—set an attribute page for each country
  - Trade area entity—set an attribute page for each trade area group
- Set scheduling details in the Geocoder concurrent program to obtain the spatial coordinates of the site.

For information on the basics of Google Maps viewing, searching, displays, and problem resolution—access the Google Maps Help Center at maps.google.com/support/?hl=en.

## Map Setup

Google maps can be used in Site Hub without setting up map preferences, but the profile options must be set to use default functionality.

### Setting up map functionality in your environment:

1. If using Google Maps JavaScript API Version 2, obtain the Google Map key from Google, Inc.

   If you are using Google Maps JavaScript API Version 3, this key is not required. Proceed to the instructions in Step 4.

   The key is obtained from this site: google.com/apis/maps/signup.html. The key is generated based on the hostname of the application server.

2. Navigate to the Personal Profile Values window, and select the profile option CSF: Google Map Key.

3. Enter the map key you obtained form Google, Inc. into the Default Value field, and save your record.

4. Select the profile option RRS: Google Map Client ID, and enter the client identification provided by Google, Inc.

   The Client ID is obtained after purchasing an Enterprise license from Google. See: google.com/enterprise/

5. Generate the Locations Spatial Index Rebuild concurrent request in the Trading Community Manager responsibility.

   This program builds a spatial index on the HZ_LOCATIONS table. See: Locations Spatial Index Rebuild, Oracle Trading Community Architecture Administration Guide.

6. Set the profile option, Applications Server-Side Proxy Host And Domain to your proxy server name.

7. Set the profile option, Applications Proxy Port to your proxy port.

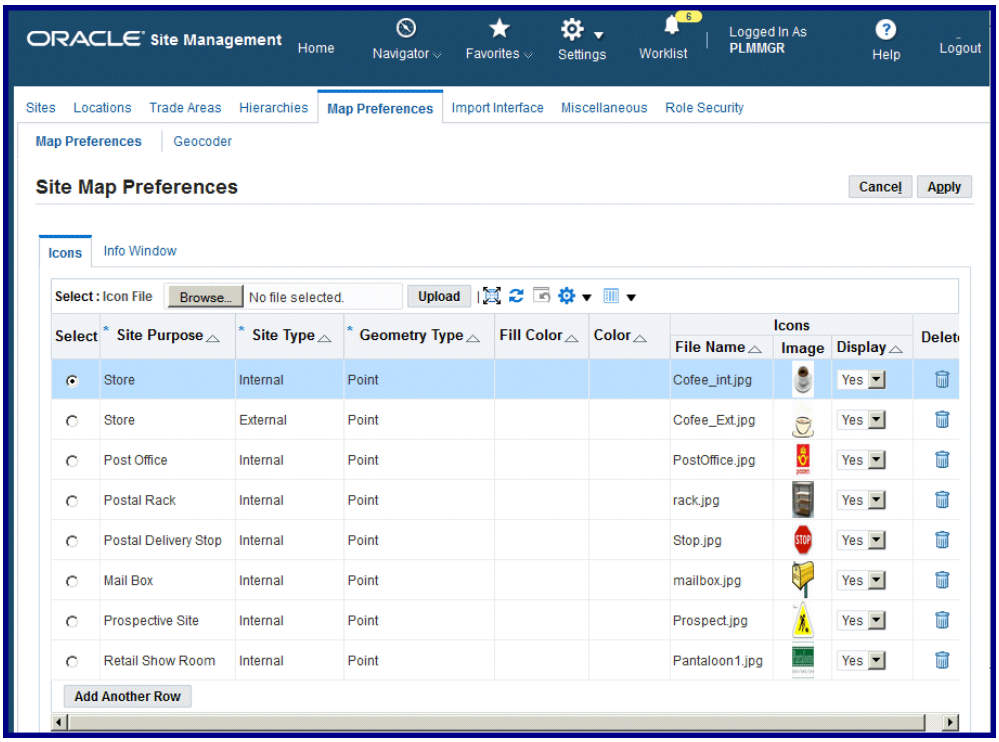
8. Optionally, you can set the profile option RRS: Trade Area Group Map Layout Type to set trade areas on the map as filled with color, or not.

9. Save your work.

### To define site map preferences:

1. Navigate to the Map Preferences tabbed region and the Map Preferences section.

In the Icons tabbed region, a list of the existing map site purposes and geometry types appear in a table format.




2. Select Add Another Row, and select a record in the Site Purpose field.

   This is the primary business purpose of the site.

3. In the Site Type field, select whether this record is either an Internal or External site.

4. Select a value in the Geometry Type field, your choices are:

   - Point: Points can represent buildings or other location points for your site purpose. You can upload an image icon to define the site on the map.

   - Polygon: Polygons form an implied closed area representing a location. You select a color to fill the area on the map, but do not upload an image file. See: Polygon Geometry Visualization, page 6-16

5. If this Site Purpose record is Point Geometry Type, you can import an image for the map by selecting a value in the Icon File box by using the Browse button.

6. In the Choose File to Upload dialog box, select a record, choose Open, and then choose Upload

   The file name appears in the File Name field, and the image icon appears in the Image field. If icons are not uploaded for a record, a default marker is displayed.

**Note:** The Fill Color and Color fields and not enabled for Point Geometry Types.

7. Select a value in the Display field.

   Your choices are Yes or No. This sets whether or not the site is mapped with this icon. If set to No, the default icon is used on the map.

8. If this Site Purpose record is Polygon Geometry Type, select a polygon color for the area by entering an HTML color code number in the Fill Color field. For example, color code numbers can be:

   - Green: #008000
   - Red: #FF0000
   - Yellow: #FFFF00

9. Choose Apply.

   The color number entered appears in the Color field.

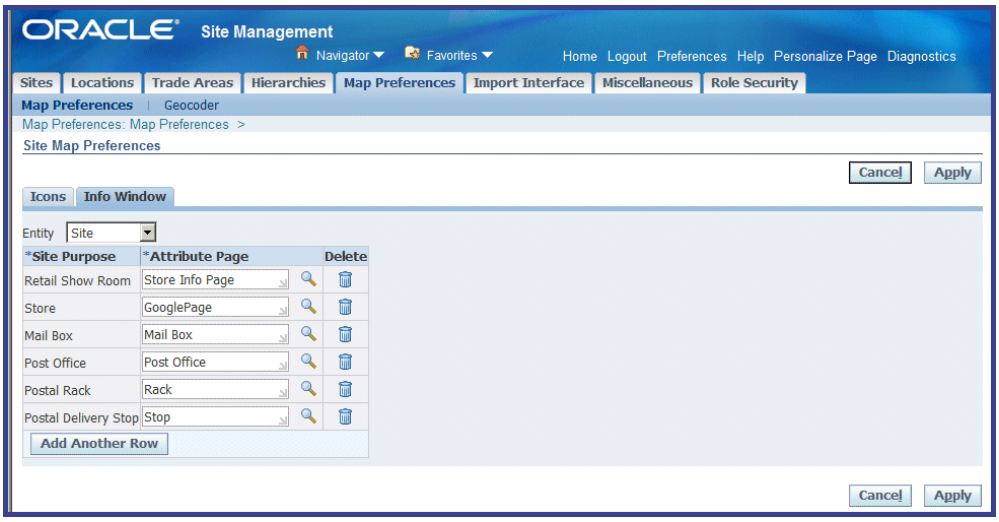
   **Note:** The File Name, Image, and Display fields are not enabled for Polygon Geometry Types.

10. Select Apply to save your work.

11. In the Information Window tab you can view and add attribute pages for Site, Location, and Trade Areas. Select an entity value:

    - Site—select a Site Purpose and Attribute Page value
    - Location—select a Country and Attribute Page value
    - Trade Area—select a Trade Area Group and Attribute Page value

    **Note:** The Site, Trade Areas, and Location entities display in the Information Window if existing Attribute Pages are assigned to a Site Purpose.




12. Select Apply to save your work.

## Related Topics

Google Maps Help Center: maps.google.com/support/?hl=en

Profile Options, page 2-6

Setting Your Personal User Profile, *Oracle E-Business Suite User's Guide*

Site Geocode Program, page 6-6

# Site Geocoder Program

The Geocoder program is a concurrent request based on geometry coordinates used to view sites on a Google Map. The program calculates the geocodes using Google programming interfaces to find geodetic coordinates, that is, the latitude and longitude of a site. These coordinates are based on the primary address of the site, and the information is stored in Site Hub for spacial analysis around a site.

The Geocoder enables scheduling from geocoding for new sites, specific sites and purposes, or sites that had errors and were not geocoded during site creation. You can launch this program for a large number of sites, typically after a bulk import.

The profile option, RRS: Default Geocoding Preference, is used to set the default value for launching this program when creating site records. If set to System Generated, the program uses the address fields entered in the site record and is automatically launched when the record is saved. If set to User Entered, the program uses the longitude and latitude values and must be manually launched. See: Profile Options, page 2-6

### To launch the Geocoder concurrent program:

1. Navigate to the Geocoder page.

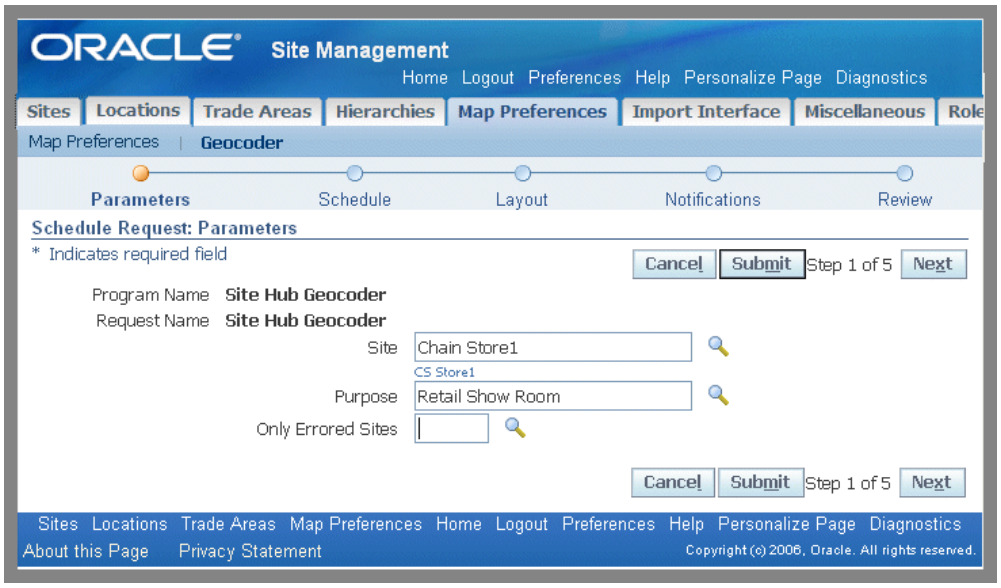
2. You have the option to select values in the following fields:

   - Site field if you want to run this program for a specific site.

   - Purpose field if you want to run this program for sites with a specific purpose.

   - Only Errored Sites field if you want to run this program for site records that were not mapped during site creation.

3. Select Submit to launch the Geocode concurrent request, or select Next to set scheduling parameters.




4. If you select Next, the Schedule Request: Schedule page appears. The process train highlights each step as you proceed through the pages where you can select runtime details for this request including:

   - Schedule—Start Dates, Recurrence, Interval, Schedule Name

   - Notifications—Recipients

   - Review

5. Select Submit to launch the report.

## Viewing Site Map Details

You can see the location and other data of a site viewed on a map. The map enables you to select criteria for the type of site information you want displayed. For example, you can select all external sites within a specific radius. The page view consists of a Site Map and Mapped Details regions for the sites selected. The Mapped Details region displays the site summary details in a tabular format. Features of the site map include:

- **Attribute Pages**

  If attribute pages are associated with a site, when you click the site icon on the map, a dialog box displays with the page information setup.

- **Directions From and To a Site**

  Basic navigation features provide the capability to get directions from one point to another on a map.

- **Key Sites**

  The site you use to access the map is designated as the key site. Key sites are the focal point for comparisons (internal, external, trade regions) with other sites on the map. This designation can be changed, or you can define other sites as key sites in the Actions in the Mapped Sites region.

- **Polygon Geometry Visualization**

  Polygons form a closed area on the map. These polygons represent areas such as sales territories, public sector parcels, and insurance risk coverage. These areas are outlined on the map by specific colors.

- **Search Nearby**

  You have the ability to search for places within a specified area by supplying keywords or other search criteria.

- **Site Icons**

  Icons are defined for internal and external sites. External sites are sites not owned by your organization such as competitor sites.

- **Sites Not Mapped**

  Sites unable to be mapped are listed in the Key Sites Not Mapped region. Sites are listed in this area when there is missing or invalid geographical or purpose data.

- **Street View**

  Views from many locations in the world are available. These images appear after zooming in to a location on a map. Using the keyboard or mouse, the horizontal

and vertical viewing direction and zoom level can be selected.

- **Trade Area Groups**

  Trade area groups are represented by concentric circles defined for trade area group regions.

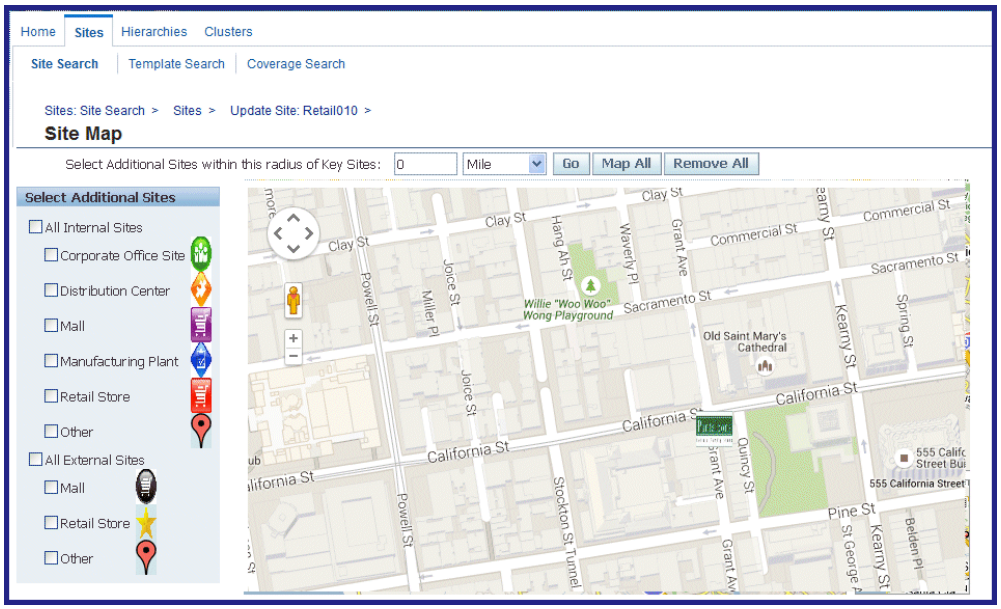
  **Note:** For information on the basics of Google Maps viewing—access the Google Maps Help Center at maps.google.com/support/?hl=en.

### To view site map details:

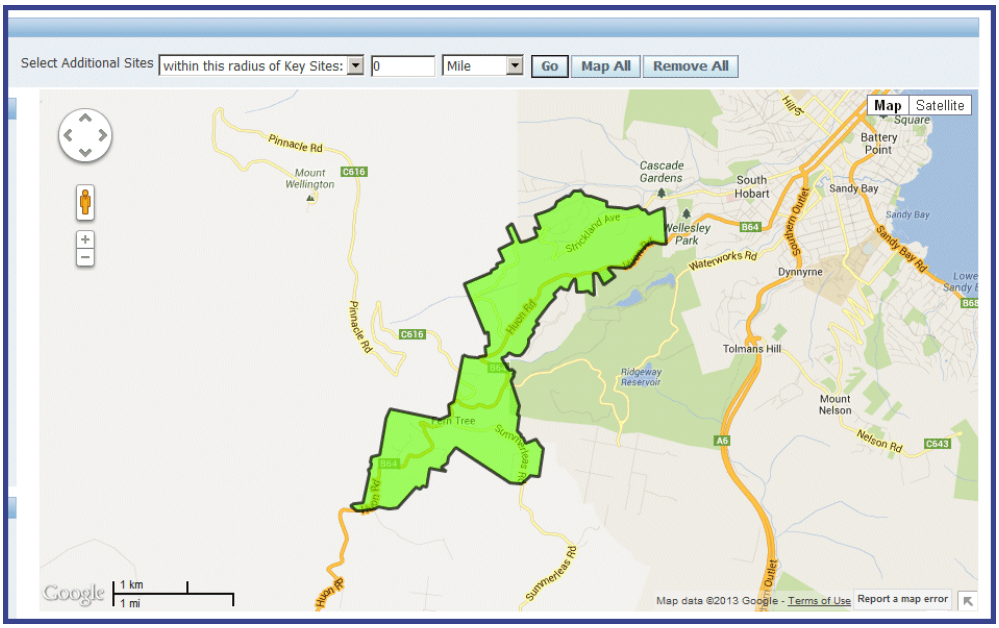
1. On the View Site page, select View Map.

   The Site Map is also accessed by selecting multiple records on the Sites page, and choosing Map All.

   In the Map Preferences setup, if you selected point geometry, images define site icons on the map.




   If you selected polygon geometry, a closed polygon area represents areas for the site purpose on the map. See: Polygon Geometry Visualization, page 6-16




2. In the Select Additional Sites column, select site purpose icons for your sites to display on the map.

   All icons uploaded in the Site Map Preferences window, the Icons tab, are displayed. Default icons display if there is no icon uploaded and associated with a site purpose. See: Defining Site Map Preferences, page 6-2

3. In the Select Additional Sites within this radius of Key Sites box, select a distance and unit of measure for the display of the sites.

4. Select Go to display the results of your search.

   The additional sites appear in the Mapped Sites detail table. Site summary details are displayed for Name, Number, Type, Primary Purpose, Key Site, Trade Areas, and Trade Area Group fields.

   Select Show to display the information for Status, Brand Name, Calendar, Legal Entity, and Address details.

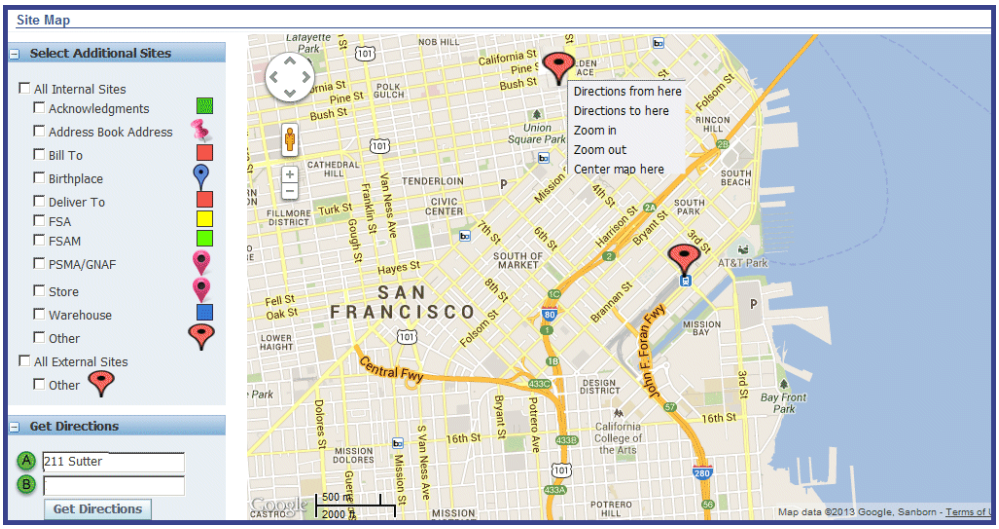
5. You can add or remove the sites on the map display by selecting Map All or Remove All.

   When your select Remove All, the site defined as the Key Site, remains on the map display.


6. Obtaining directions from one site to another is available if you are using Google Maps JavaScript API Version 3. You can also zoom in or out, or center the map around the site location.

   Right-click with your cursor on the starting point site location. A menu appears with the following choices:

   - Directions from here
   - Directions to here
   - Zoom in
   - Zoom out
   - Center map here



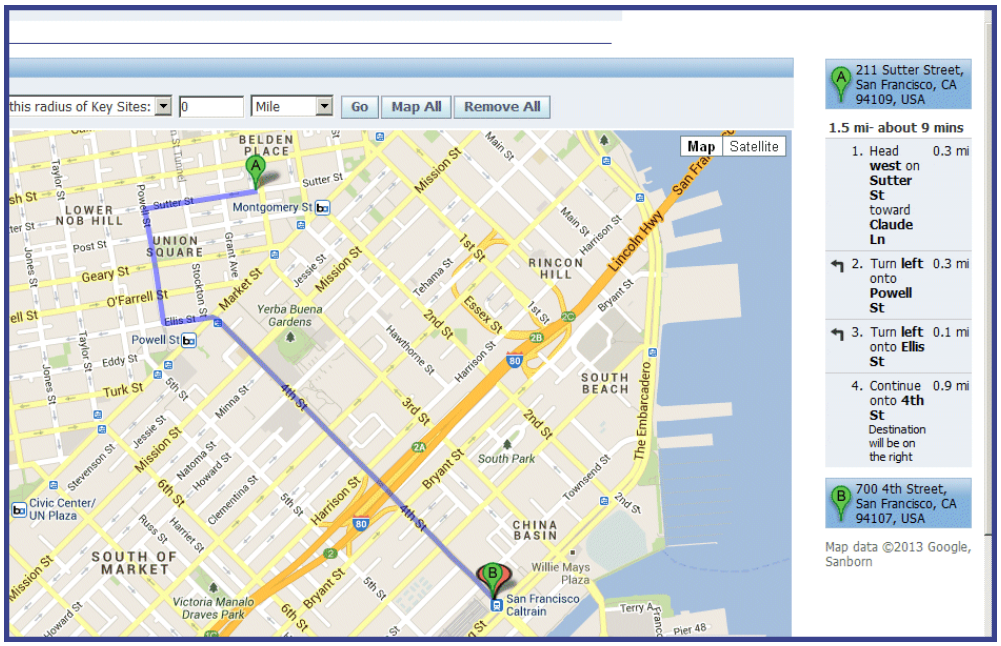

7. Select Directions from here or Directions to here, depending on which site location is the starting or ending point for directions.

   The address appears in the Get Directions section, in the A field.

8. Right-click with your cursor on the ending point site location.

   The address appears in the Get Directions section, in the B field.

9. Select Get Directions.

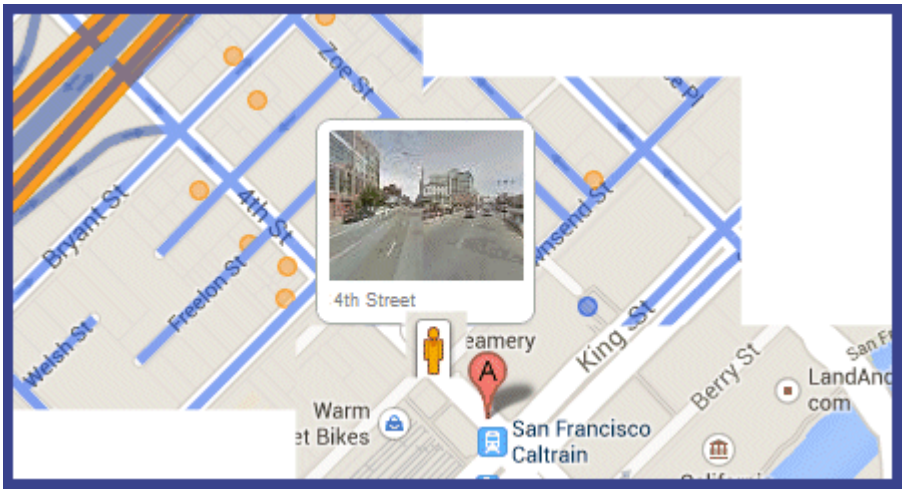



The path from site A to site B, and a side panel with the directions, appear on the map.

10. If you are using Google Maps JavaScript API Version 3, Street View images are available for selected sites. Navigate to these images using the following methods:

- Drag the Pegman icon onto the location on the map.

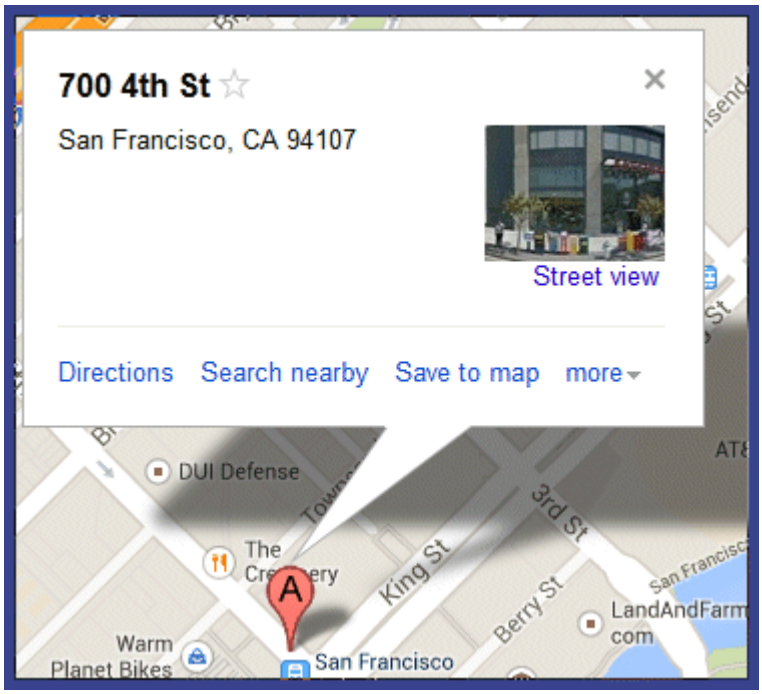
  A full-size image displays of the location selected.




- Left-click with your cursor on the site.

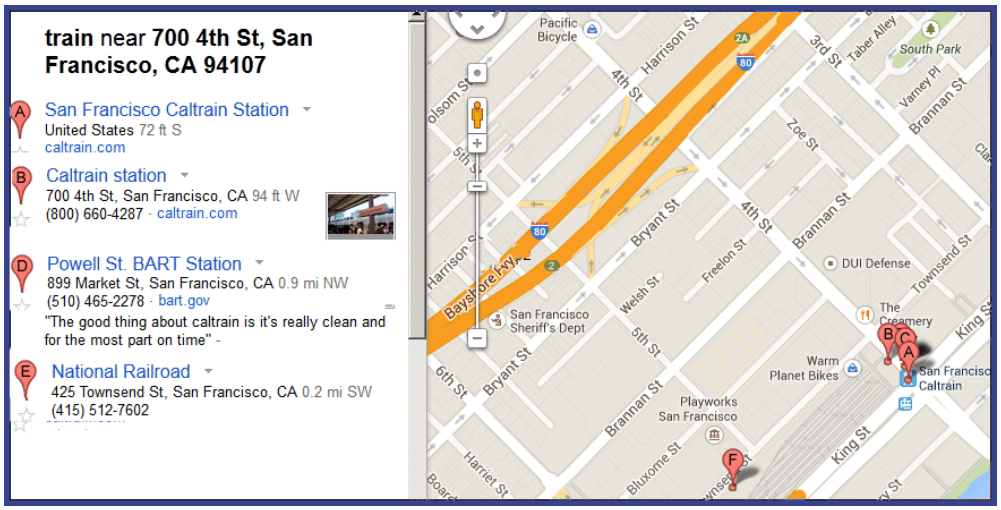
  A dialog box appears with a small scale view of the Street View photo. You can

select the photo to view a full-size image.




11. In Google Maps JavaScript API Version 3, you can select Search Nearby to query businesses, points of interest, or other landmarks located near the selected site. Enter keywords, addresses, or numbers applicable to your search in the Search nearby box.

12. Select Search. The results of your search appear on the map, with a listing of sites on the map border.




13. If attribute pages are associated with a site, when you click the site icon on the map, a dialog box displays with the page information setup.

14. You can select site records in the table, and select one of the choices In the Action box:

- Map Trade Area Group

  Displays the concentric circles around the regions setup for the site representing the trade area group region. These areas are defined on the Create Trade Area Group page. See: Viewing and Creating Trade Area Groups, page 4-29

- Remove Trade Area Group

  Removes the displayed concentric circular trade area group region.

- Remove Site

  Clears the site icon from the map.

- Compare Up To 5 Sites

  Accesses the View Comparisons page to compare sites and entity attributes for comparison of data. See: Comparing Sites, page 5-35

- Designate Key Site

  Enables you to specify other sites as key sites for data comparison.

- Remove Key Site Designate

  Clears the key site designation for selected sites.

## Polygon Geometry Visualization

Polygons are composed of connected lines forming an implied closed area or zone. Polygon site locations can be used to define coverage area. For example, polygon areas can represent:

- Retail marketing or sales territories.
- Public Sector law enforcement, parcel data, and zip code areas.
- Oil and natural gas oil fields.
- Insurance fire break, flood, and earthquake zones.

Polygon data consists of coordinate pair values, one vertex pair for each line segment of the polygon. Features include:

- A point in a polygon can represent a building location; a line string might represent a road, or flight path.
- The ability to create bulk import of polygon sites.
- Coverage areas can be queried for an address or geocode coordinates.

> **Note:** Different polygons can overlap with each other. However, one polygon cannot have lines that cross into each other creating overlapping borders. The coverage must be one continuous closed area.

There are two creation methods for polygon sites on the site map:

- Geofencing enables these areas to be created using mouse action. See: Creating Geofence Map Zones, page 6-17
- Software releases of Oracle Site Hub previous to Release 12.2.5, polygon sites are defined using special-purpose programming, Structured Query Language (SQL). See: Creating Polygons Using an SQL Statement, page 6-16

### Creating Polygons Using an SQL Statement

You can create and manage polygon geometry for a site by using a Structured Query Language (SQL) program designed to define these objects, similar to the following example:

```
UPDATE HZ_LOCATIONS
   SET GEOMETRY = SDO_GEOMETRY(2003, -- two dimensional polygon
                               8307, -- SDO_SRID keep it as is.
                               NULL,
                               SDO_ELEM_INFO_ARRAY(1, 1003, 1), -- normal polygon
                               SDO_ORDINATE_ARRAY(
                                                  148.534851,
                                                  -26.438107,
                                                  148.544891,
                                                  -26.439375,
                                                  148.548416,
                                                  -26.436031,
                                                  148.542450,
                                                  -26.430998,
                                                  148.534851,
                                                  -26.438107
                                                )) -- specify in counter clock-wise
direction and end in the coordinates of the first point
WHERE LOCATION_ID in
        (select hz.location_id
           from rrs_sites_b b, rrs_sites_tl tl, hz_locations hz
          where tl.site_id = b.site_id
            and b.location_id = hz.location_id
            and tl.name = 'Lot Site 58'
            and tl.language = 'US')---Lot Site 58
```

## Creating Geofence Map Zones

Geofencing enables you to dynamically create polygon sites using several methods to place the markers on the site map:

- Left-click a location with your mouse; this adds a marker at that point. Continue this mouse action until the selections form a closed area.
- Add an address in the map's Search box to place a marker. Continue adding addresses until the selections form a closed area.
- Enter the longitude and latitude values in the Search box to place a marker on the map. Continue entering geodetic coordinates until a closed area is formed.
- Drag markers on the map to modify a polygon shape.

When creating these forms, the Site Map page contains options to:

- Undo the action of creating the last marker added to the map.
- Clear to eliminate all markers you added to the polygon on map.
- Save to temporarily save your draft work on the polygon on the map.

**Note:** This feature only uses Google map functionality.

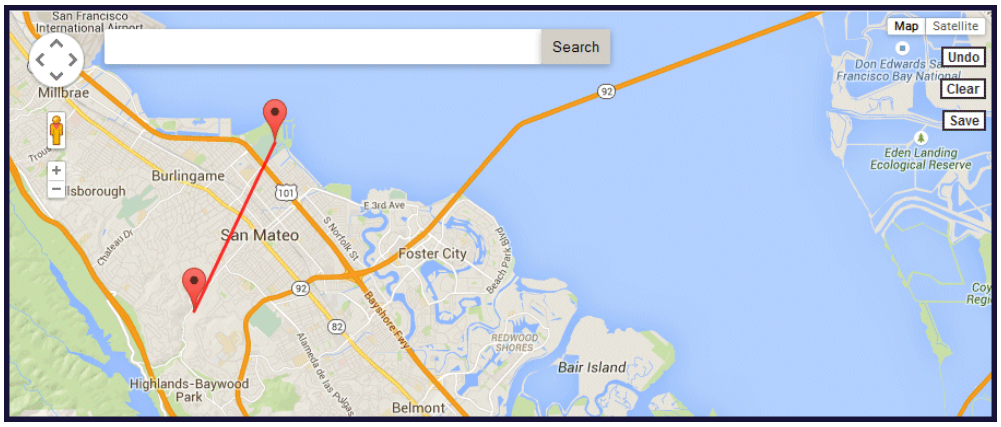
### To create polygon site Basic Information:

1. Navigate to the Create Site page.
2. Select the Draw Site on Google Map method, and select Create.

   The Create Site: Basic Information page appears.
3. Enter values in the Name and Number fields. If profile option RRS: Auto Default Site Number is set to Yes, the next number in the sequence appears. You can change the defaulted value to any unique value.
4. Optionally you can enter values in the following fields:
   - Type—identifies if the site is an Internal or External site
   - Status—Active or Inactive
   - Brand Name—company's identifying name, specified in the Site Hub Lookups, page 2-4
   - Calendar—BOM Calendar for the inventory organization associated with the site
   - Legal Entity—defined legal name
5. Use one of the following methods to create the polygon site.

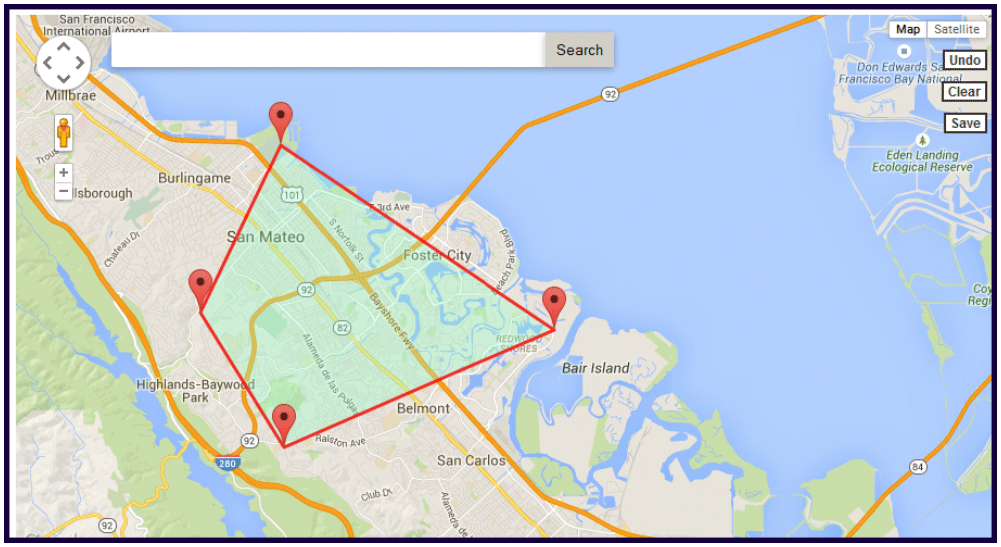
### To create a site by drawing on a map:

1. On the Map region of the page, select a location on the map and left-click with your mouse to insert a marker on the map.




2. Select a second location on the map and left-click with your mouse to insert another marker; this connects the two markers with a line.

3. Continue to select locations on the map to insert markers until you form a closed polygon area.

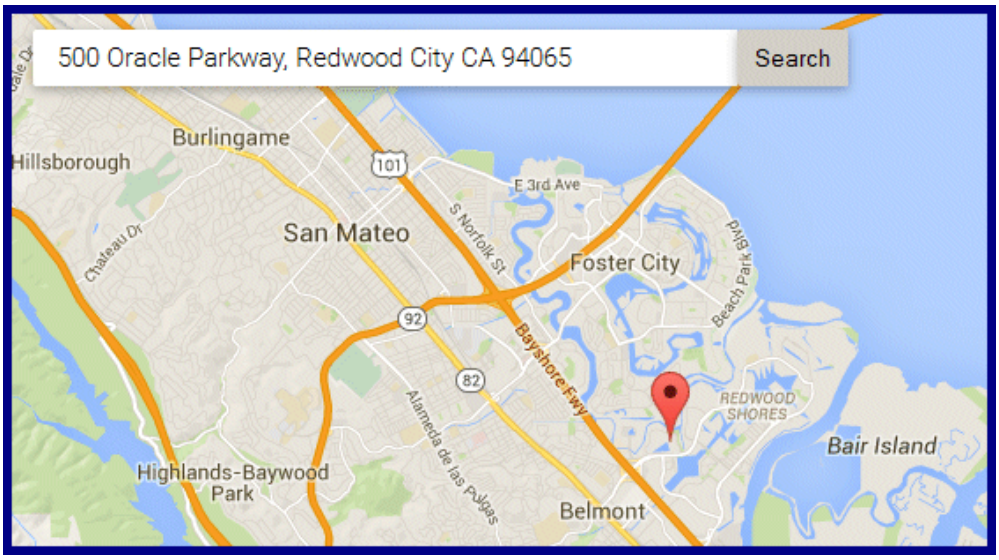



4. Save your work.

### To create a site adding addresses on the map to place markers:

1. After entering the site Basic Information, add an address in the map Search box.

2. Select Search to place the marker.



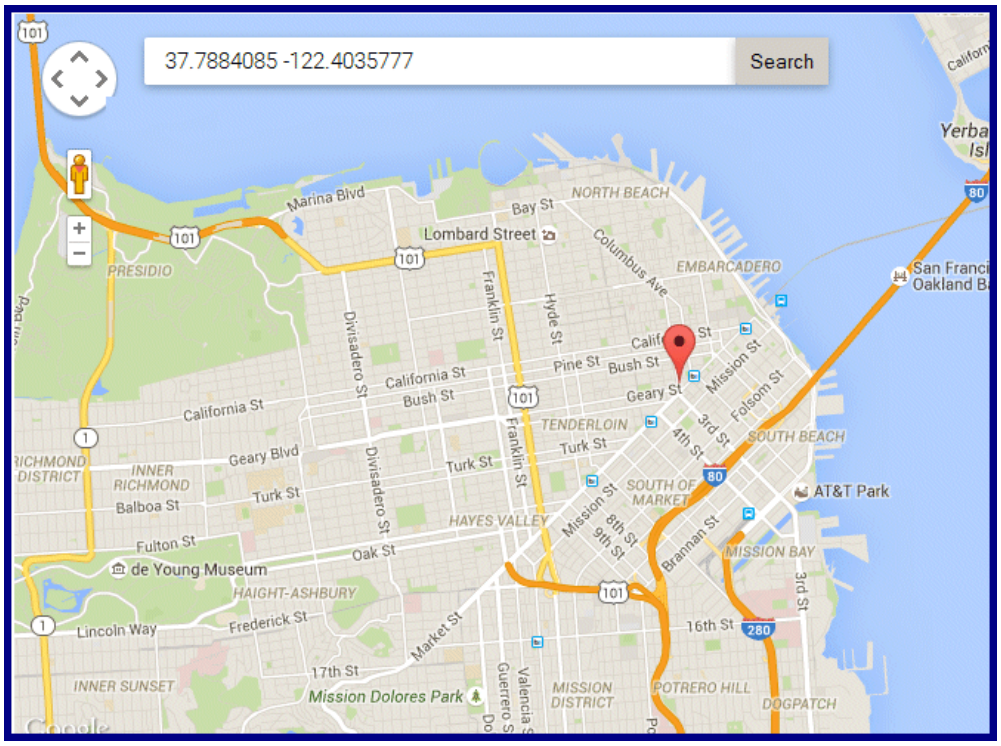

3. Continue adding addresses in the Search box and choosing Search until the selections form a closed area.

4. Save your work.

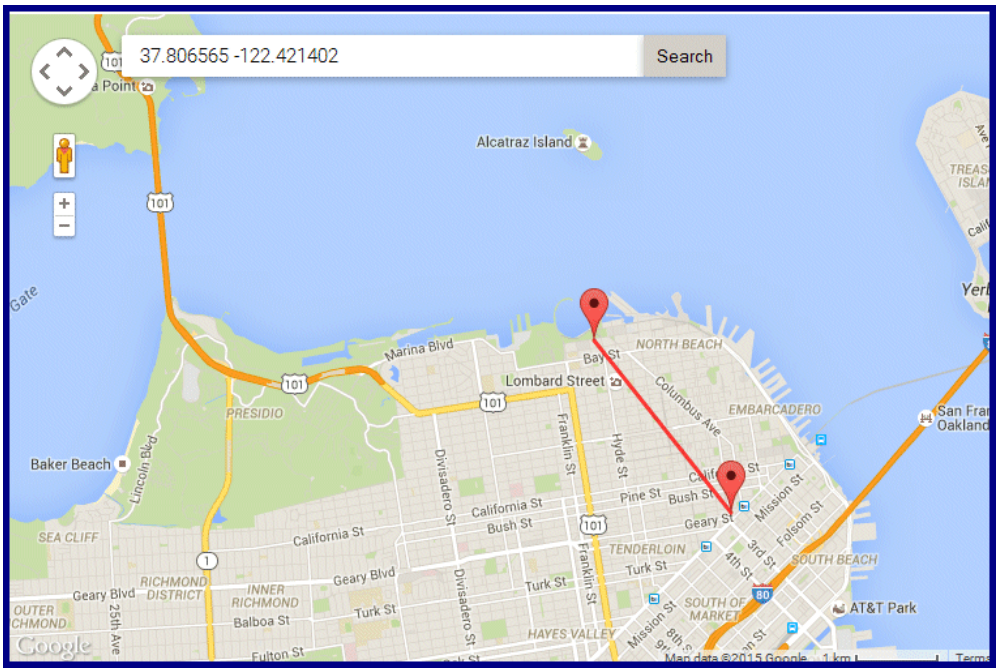
### To create a site adding longitude and latitude coordinates on the map:

1. After entering the site Basic Information, add longitude and latitude coordinates in the map Search box.

2. Select Search to place the marker.




3. Continue adding longitude and latitude coordinates in the Search box and choosing Search until the selections form a closed area.




4. Save your work.

## Searching Coverage Areas

Coverage search provides the ability to query the qualifying area included for a given radius or intersecting sites for an address or geocode meeting your search criteria.

### To search the qualifying area for site coverage:

1. Navigate to the Sites tabbed region or a specific site record, and choose Coverage Search.

   The Site Map page appears. If you navigated to this page from a specific site, the site marker appears on the map.

2. If a specific site was not selected, enter the address or geocode coordinates in the Search box. Select Go to display the site location on the map.

3. In the Select Additional Sites column, select the qualifying site purpose icons you want to include in the coverage search.

4. Set the key site used as the center of the coverage search by selecting a marker, and left-click with your mouse to display the site address.

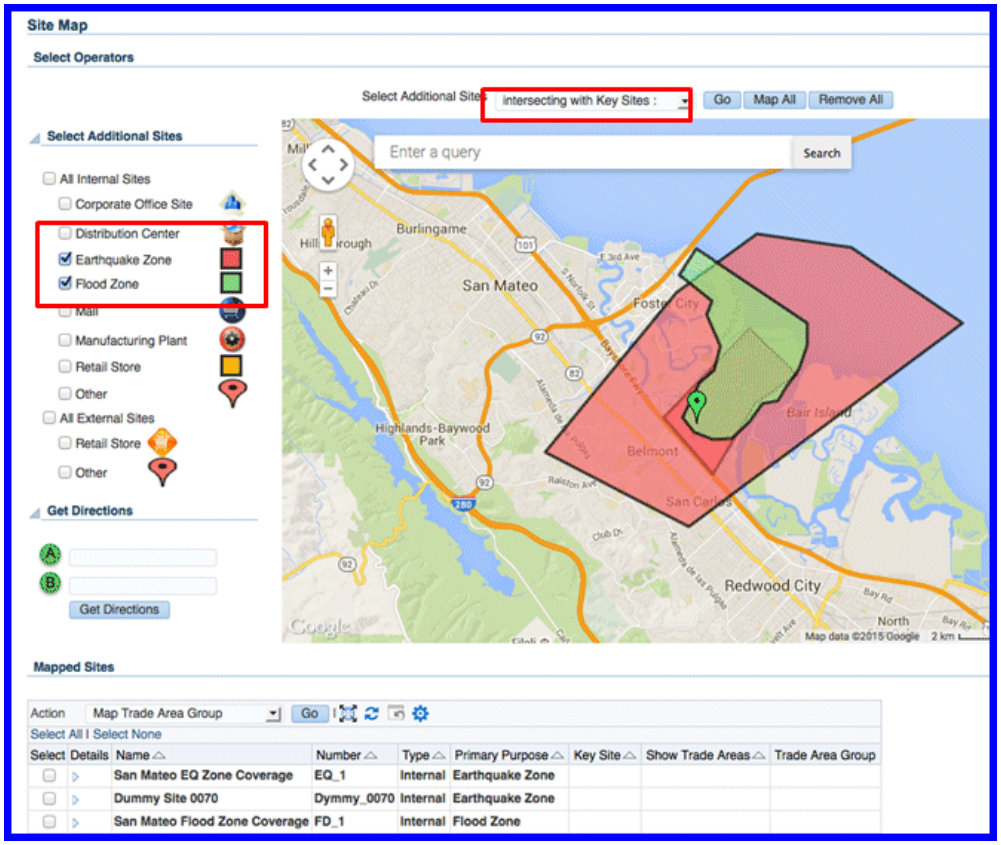
5. Select Set as Key Site.

6. In the Select Additional Sites box, choose how your want the coverage search calculated. Choices are:

   - within this radius of Key Sites
   - intersecting Key Sites

7. Enter a value for the range of the area you want to included in the coverage, and the unit of measure used for this boundary area. Choices are either Kilometer or Mile.

8. Select Go to display the results of your search.




   - The key site in the search appears as a marker in the polygon area .
   - Polygon shapes are the sites either intersecting or within the radius of the target location key site, depending on the selection.
   - Mapped site coverage details selected appear in the Mapped Sites section.

# 7

# Site Hierarchies

This chapter covers the following topics:

- Overview of Site Hierarchies
- Creating Hierarchies
- Updating Hierarchies
- Viewing Site Hierarchies
- Using the Hierarchy Workbench

## Overview of Site Hierarchies

A hierarchy is a tree representation of the relationships between multiple sites, grouped by common characteristics at several levels. This logical grouping acts as a visual aid and enables you to drill down to site details. The hierarchy functionality in Site Hub provides for organizations with a large number of sites to create relationship roles between sites. You can create hierarchical structures for your sites according to both site and hierarchy purposes and attributes.

The Site Hub Hierarchy Workbench enables you to manage hierarchies, their nodes, and associated sites. You can:

- Create hierarchies.
- Add site records to a hierarchy.
- Create new nodes on a hierarchy structure.
- Create and view parent-child relationships between sites in a hierarchy.
- Edit hierarchies. For example, you can move and copy members.

Access the Site Hub Hierarchy Workbench through the following navigation:

- Site Management User > Site Management User > Site Home > Home > Hierarchies > Hierarchy Workbench

## Related Topics

Creating Hierarchies, page 7-2

Viewing Site Hierarchies, page 7-6

Defining Hierarchy Relationship Rules, page 4-54

Using the Hierarchy Workbench, page 7-9

# Creating Hierarchies

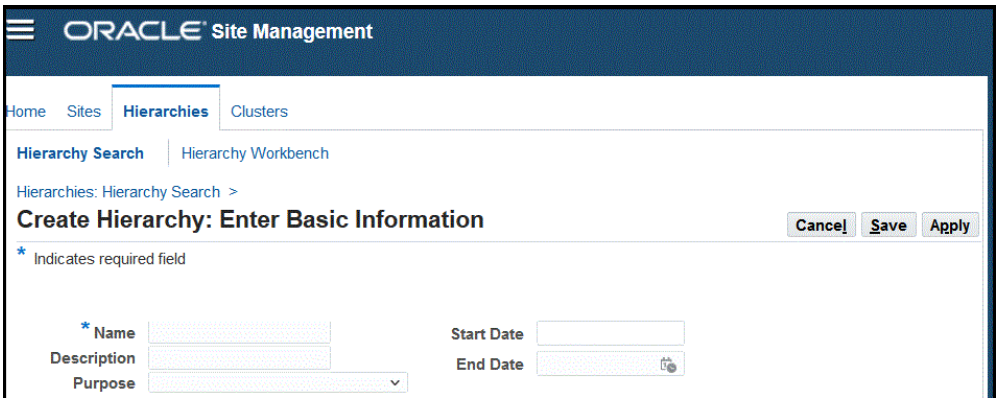
A hierarchy is a tree representation of multiple sites, grouped at several levels. You can create hierarchical structures for your sites, categorizing business purposes for both the hierarchy and its associated sites. You can add or remove nodes and sites after you have created the hierarchical structures.

### To create a site hierarchy:

1. Navigate to the **Create Hierarchy: Basic Information** page (Site Management User > Site Management User > Site Home > Home > Hierarchies), and click the **Create** button.

2. Enter a value in the **Name** field.

3. (Optional) enter values in the **Description**, **Purpose**, **Start Date**, and **End Date** fields.




4. Save your work by selecting one of the following options:

   - Click **Apply** to save your record and return to the **Hierarchies** page.

- Click **Save** to display the **Hierarchy Workbench** page.

## Updating Hierarchies

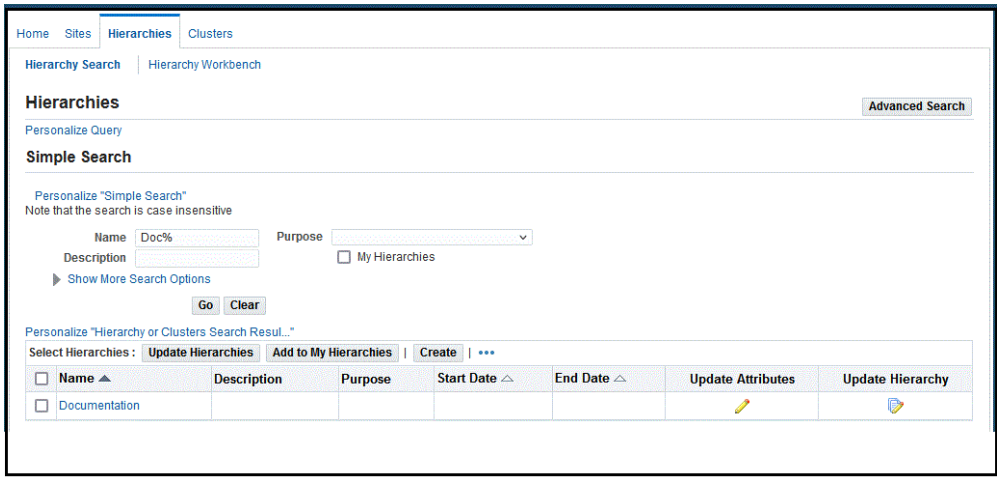
You can perform update transactions, such as create and add sites and nodes, and update hierarchy attributes using the Hierarchy Workbench.

### To update records using the Hierarchy Workbench:

1. Navigate to the Hierarchy Workbench (Site Management User > Hierarchies > Hierarchy Workbench).

2. Search for the hierarchy and add it to the Hierarchy List,

3. Click the **Update Hierarchy** button to access the Hierarchy Workbench to make changes to the hierarchy.




The **Hierarchy Workbench** page appears.

4. Drag and drop the hierarchy from the Hierarchy List pane to the Edit Pane 1 pane.

5. Highlight the hierarchy and right-click to access the following options in the context menu:

   - Expand - Select to expand and view any associated child nodes.

   - Collapse - Select to hide any associated child nodes.

   - Move Member - Select to move the member from Edit Pane 1 to Edit Pane 2, or to a different location in the same pane. Available only if there is a hierarchy in Edit Pane 2. You can also use the Drag and Drop action to move the member to

another location in the destination pane or within the same pane.

- Copy Member - Select to copy the highlighted hierarchy from one hierarchy to another hierarchy. You can also use the Drag and Drop action to copy the member to another location in the destination pane or within the same pane.

- Create Site - Select to create a Child, Sibling Before, Sibling After. A site must exist to create a sibling before or after.

  Sibling Before and Sibling After options are disabled for root nodes in the edit panes.

- Add Site - Select to create a Child, Sibling Before, Sibling After. A site must exist to add a site sibling before or after.

  Sibling Before and Sibling After options are disabled for root nodes in the edit panes.

- Create Node - Select to create a Child, Sibling Before, Sibling After. A node must exist to create a sibling before or after.

  Sibling Before and Sibling After options are disabled for root nodes in the edit panes.

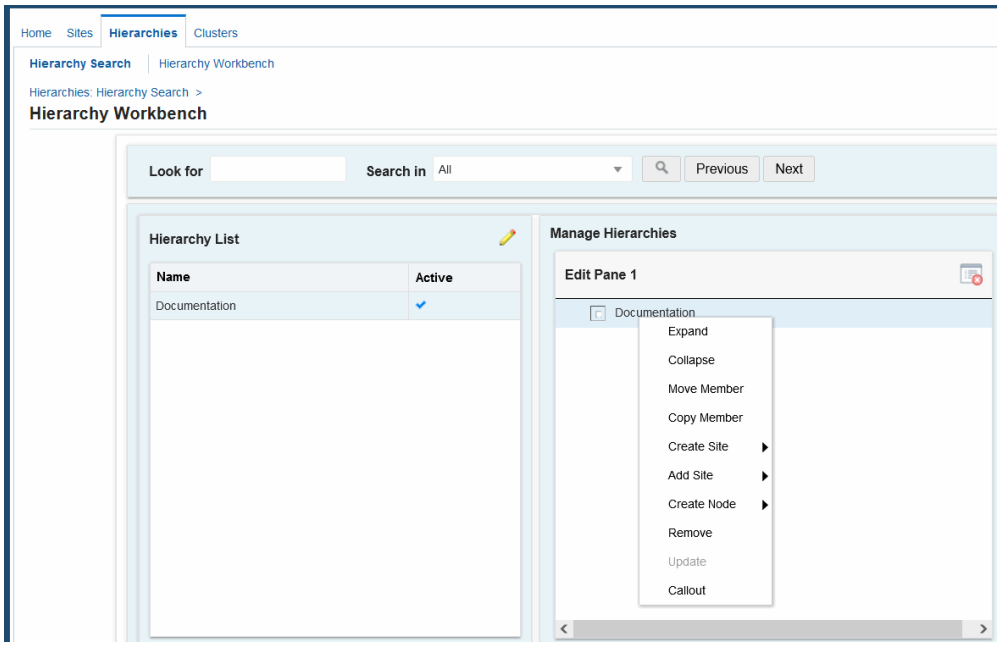
- Remove - Select the hierarchy member that you want to remove. Any associated child members will also be removed.

- Update - Select to update the attributes (name, purpose, description) for the nodes and sites for the hierarchy member.

  > **Note:** You cannot update the root hierarchy from the Hierarchy Workbench.

- Callout - Select to set up a custom page to enter transactions for your environment's requirements. The data that appears in the panes is passed to the custom page.

  See Custom Hierarchy Page, page B-1 for more information.



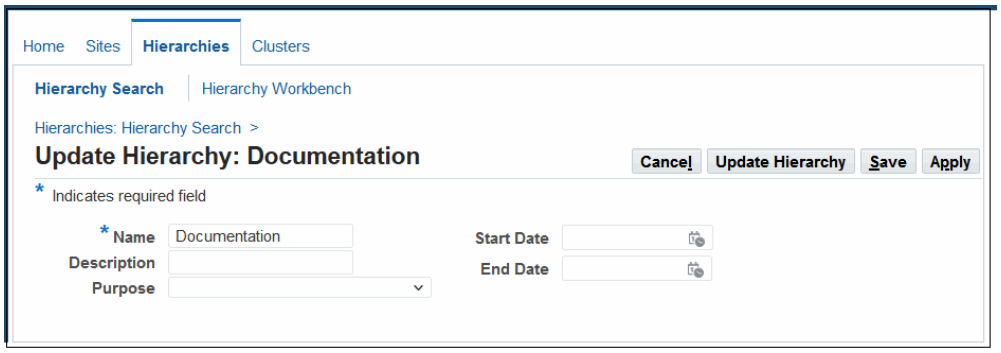

6. Click Apply to save your work.

7. To edit the record, highlight the object, right-click and select Update. For more information, see: Using the Hierarchy Workbench, page 7-9

## Updating Hierarchy Attributes:

1. Click the **Update Attributes** icon for the hierarchy.

   The **Update Hierarchy Attributes** page appears.




2. Edit the following fields if needed:

   - Name
   - Description

- Purpose
- Start Date
- End Date

3. Click Save or Apply to save your work.

## Viewing Site Hierarchies

Site Hub enables you to search and view hierarchies as follows:

- My Hierarchies tabbed region on the Site Management User Home region

  Records appearing in this region are selected in the Manage My Hierarchies page for those hierarchies you frequently access.

- Hierarchies tabbed region of the Site Management User workbench

  This tabbed region displays the Hierarchies Simple Search page where you can navigate to pages to view, create, and update hierarchy records.

- Hierarchy Workbench

  You can navigate to the Hierarchy Workbench and perform searches directly on the workbench.

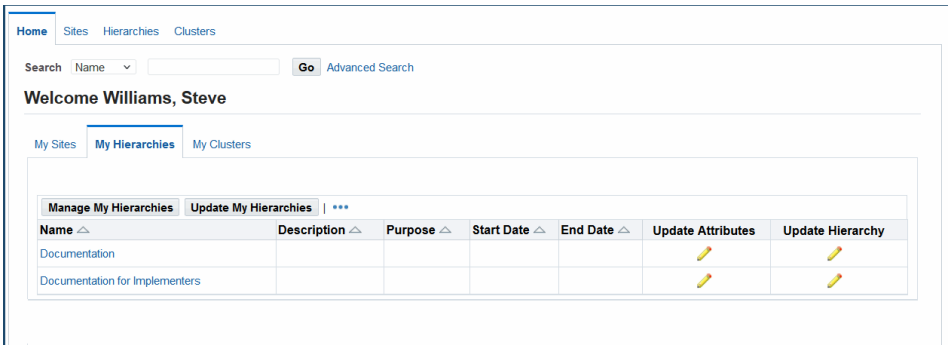
### To access records using the My Hierarchies page:

1. Navigate to the My Hierarchies page.

   The hierarchies you have identified as My Hierarchies appear on this page.

2. This page enables you to select:

   - Manage My Hierarchies to choose your default record display. These records display on the My Hierarchies page, and when you enable the My Hierarchies check box on the Hierarchies page. See: Managing Favorites, page 5-2



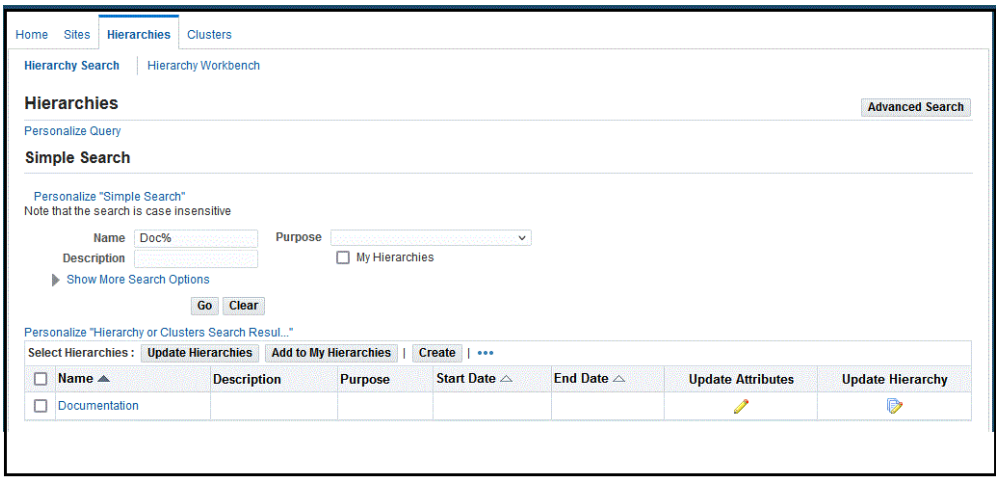

- Update Hierarchies to navigate and display all records on this page on the Hierarchy Workbench for editing. See: Using the Hierarchy Workbench, page 7-9
- Hierarchy Name link to navigate to the View Hierarchy page.
- Update Attributes to navigate to the Update Hierarchy page for a specific record.
- Update Hierarchy to navigate and display a specific record on the Hierarchy Workbench. See: Using the Hierarchy Workbench, page 7-9

### To view site hierarchies on the Hierarchy tabbed region:

1. Navigate to the Hierarchies page.
2. Enter search criteria values in Name, Description, or Purpose fields.

   You also have the option to select the My Hierarchies check box to display the Favorites records, see: Searching for Information, page 5-3
3. Select Show More Search Options to display search criteria fields for dates and status.

   **Note:** The hierarchy search function is designed to search either by date or status, not both values simultaneously.
4. Select Go to display the results of your search.




5. The Hierarchies page enables you to select:

   - Update Hierarchies to navigate and display all records on this page on the Hierarchy Workbench for editing. See: Using the Hierarchy Workbench, page 7-9

   - Add to My Hierarchies to add a record to your favorites list, see: Managing Favorites, page 5-2

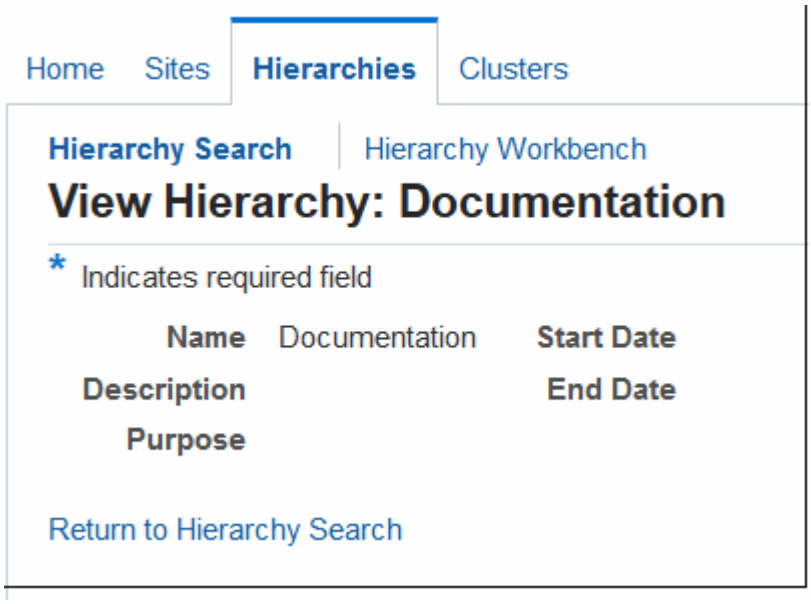
   - Create to navigate to the Create Hierarchy: Enter Basic Information page for defining new records, see: Creating Hierarchies, page 7-2

   - Update Attributes to navigate to the Update Hierarchy page for a specific record.

   - Update Hierarchy icon to navigate to the Hierarchy Workbench for editing an individual record, see: Using the Hierarchy Workbench, page 7-9

   - Hierarchy Name link to navigate to the View Hierarchy page.

6. Select the Name link for a record.




On the View Hierarchy page the hierarchy record details display such as Name, Description, Purpose, Start and End Dates, and associated attribute pages.

7. Select a record in the Page box to view an associated attribute page.

8. Select Go to display the page.

## Using the Hierarchy Workbench

The Hierarchy Workbench consists of four panes. When you navigate to the workbench by selecting hierarchy records from the search pages, they appear in the Hierarchy List pane. The records in the list can be moved to the Edit Panes as you drag and drop when performing edits on them. Associated hierarchy and site attribute details display on the Attributes pane when specific records are selected. This workbench enables you to:

- Search and add hierarchy records.
- Drag and drop records for performing edits.
- View assigned hierarchy and site attribute details.
- Create new nodes on the structure.
- Create new hierarchy records.
- Add site records to the hierarchy structure.
- Navigate to site records for editing.

For a summary of navigation moves on the Hierarchy Workbench, see: Hierarchy Workbench Navigation, page 7-16

**Role Based Access Behavior in the Hierarchy Workbench**

In the Hierarchy Workbench, the View privilege is required to display attributes, a lock icon appears if the View privilege is not granted:

- Adding a parent to a site, or adding a child node to a site, are edits to the hierarchy—not to the site.
- If view and edit hierarchy rights are not granted, only the site name is visible and the ability to update is not available.
- If view hierarchy privilege is granted, that user or group has the ability to drag site records from that hierarchy to another hierarchy record, even if edit hierarchy privilege is not granted. You can prevent this behavior by not granting view access to users for specific hierarchies.

See: Setting Up Role Based Access Control, page 3-5, and Overview of Role Based Security Access, page 3-1

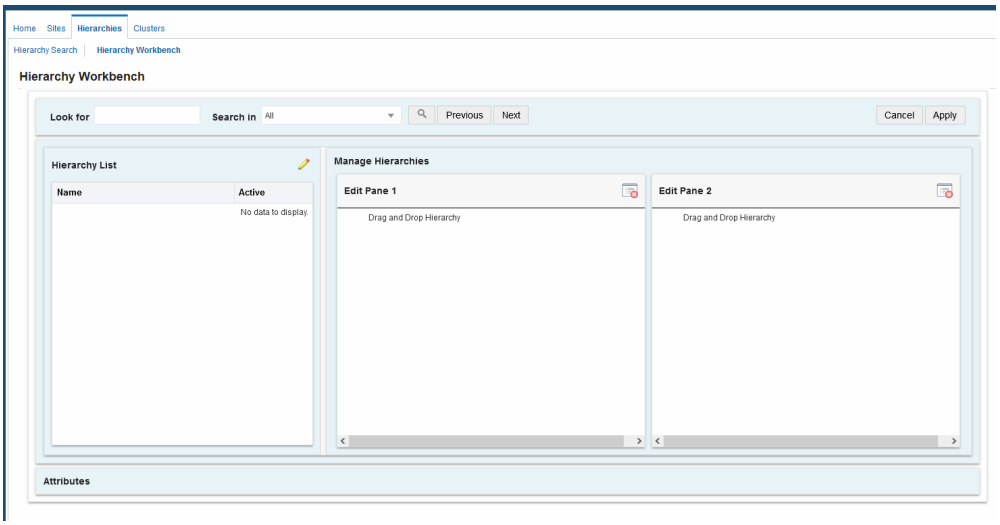
### Searching in the Hierarchy Workbench:

You can search the Hierarchy Workbench for hierarchies in the Hierarchy List, sites in the Edit Panes, and Nodes in the Edit Panes:

- The search can be filtered by selecting a value in the Search in box for All, Hierarchy List, Edit Pane 1, or Edit Pane 2.
- You can move up or down the list of records selecting Previous and Next.

### To add hierarchy records in the Hierarchy Workbench:

1. Navigate to the Hierarchy Workbench.
2. Select the Add Hierarchy (pencil) icon in the Hierarchy List pane.

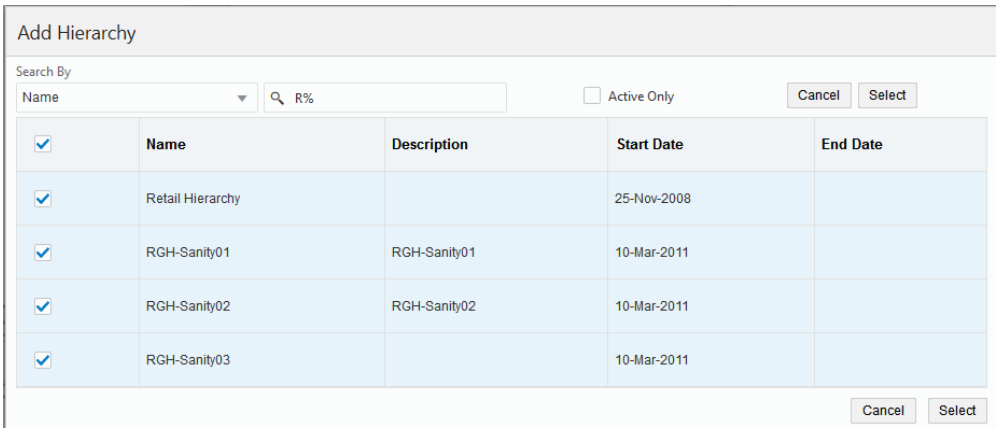



The Add Hierarchy search box appears.

3. Select a Search By value: Name or Description.

4. Enter search criteria, and the applicable values appear.

5. Select the check box for the records to display on the Hierarchy Workbench. Only the hierarchy records that are active or with no end date appear for selection.




6. Click Select to display the records on the Hierarchy Workbench.

   Click the Sort button on the Name column to sort the hierarchies in ascending or descending order.

   See: Hierarchy Workbench Navigation, page 7-16

### To search for a hierarchy element in the Hierarchy Workbench:

Now that you have added hierarchies to the Hierarchy Workbench, you can view

associated information and also make changes to the hierarchies.

1. On the Hierarchy Workbench, enter a value in the Look for field.

2. Select a value in the Search in field. Values are All, Hierarchy List, Edit Pane 1, and Edit Pane 2.

   This action enables you to narrow your search if there is a large number of hierarchy records and associated children records in the workbench.

3. Select Find, Previous, or Next to search for records.

   The system highlights the hierarchy.

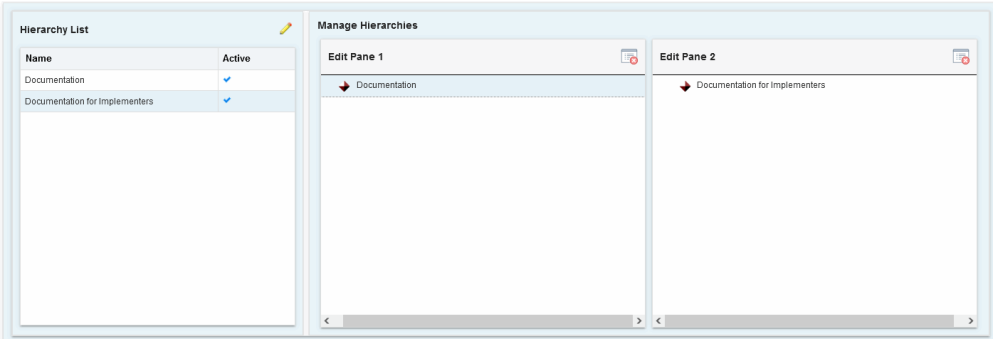
### To move records on the Hierarchy Workbench:

Set up relationship rules to define constraints on what moves are allowed. For more information, see: Defining Hierarchy Relationship Rules, page 4-54

1. Select a record on the Hierarchy List pane by left-clicking the record with your mouse.

2. Highlight the record, and drag and drop the record into one of the edit panes.

   Repeat this action as required with the records you want to display. You can edit two hierarchies at any one time.

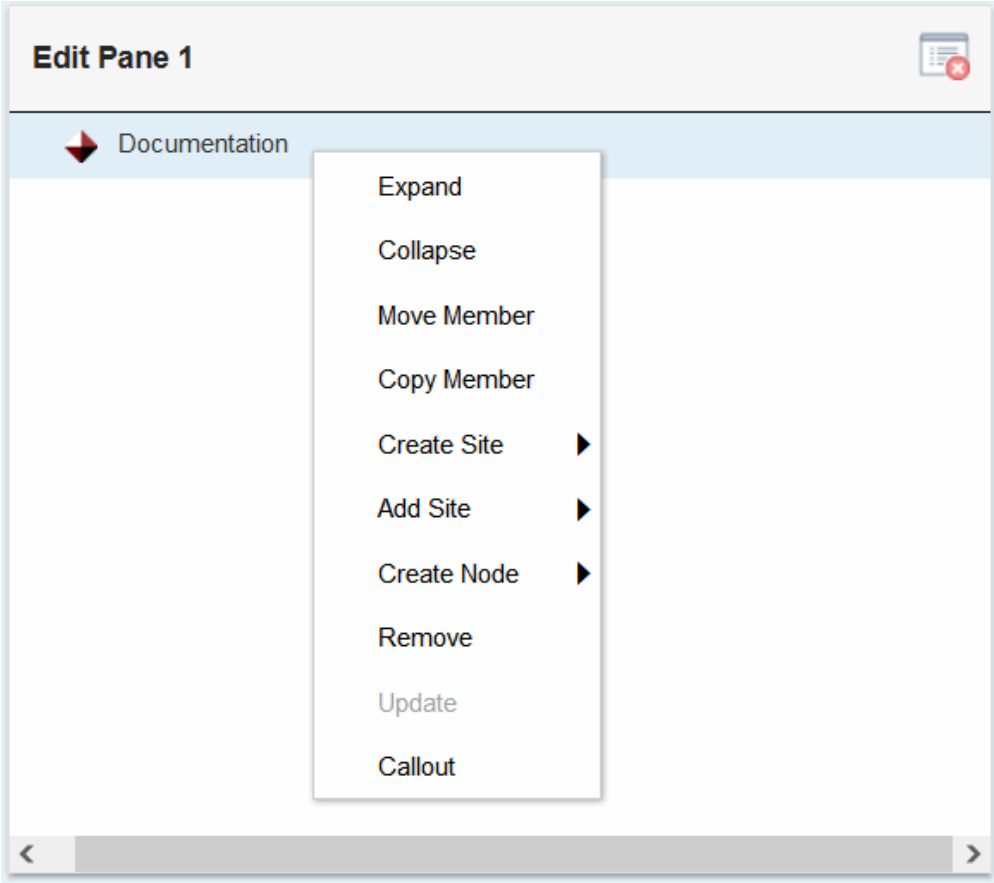



**Important:** Keyboard users should press Shift+F10 to display the Context Menu to move the selected hierarchy to an edit pane.

3. Drag and drop records from one pane to the other pane as needed.

4. Highlight a record that you would like to edit. Keyboard users should press Shift+F10 to display the Context Menu to move the selected hierarchy to an edit pane.

5. Right-click the record, and select one of the following options:




- Expand: To expand the hierarchy to view any child hierarchies.
- Collapse: To collapse the hierarchy.
- Move Member: To move the hierarchy to a different hierarchy location, within the same pane or the other edit pane. The moved hierarchy will appear at the bottom of the hierarchy in the destination hierarchy.

  **Note:** The moved hierarchy appears in the new destination only.

- Copy Member: To copy the hierarchy to the other edit pane. The hierarchy appears at the bottom of the hierarchy.

  **Note:** The copied hierarchy now appears in both hierarchies.

- Create Site, page 5-11: To create a new site record to add to the hierarchy. Select to create a Child, Sibling Before, Sibling After. A site must exist to create a

sibling before or after.

- Add Site, page 7-14: To add sites to a hierarchy. Select to create a Child, Sibling Before, Sibling After. A site must exist to add a site sibling before or after.
- Create Node, page 7-16: To add new nodes to a hierarchy. Select to create a Child, Sibling Before, Sibling After. A node must exist to create a sibling before or after.
- Remove - Select the hierarchy member that you want to remove. Any associated child members will also be removed.
- Update, page 5-26: Select to update the attributes for the member, such as the name, purpose, and description.
- Callout - Select to set up a custom page to enter transactions for your environment's requirements.

  See Custom Hierarchy Page, page B-1 for more information.
- **Clear Edit Pane** button: To remove records from one edit pane.

See: Hierarchy Workbench Navigation, page 7-16

**Note: Role Based Access Behavior in the Hierarchy Workbench**

If view hierarchy privilege is granted, that user or group has the ability to drag site records from that hierarchy to another hierarchy record, even if edit hierarchy privilege is not granted. You can prevent this behavior by not granting view access to users for specific hierarchies. . See: Setting Up Role Based Access Control, page 3-5, and Overview of Role Based Security Access, page 3-1

### To view attribute details for hierarchies and sites:

1. Select either a hierarchy record, or site record, in any of the panes on the workbench.

   The assigned attributes appear at the bottom of the workbench page.

   See: Viewing and Creating Site Attribute Assignments, page 4-12, and Viewing and Creating Hierarchy Attribute Assignments, page 4-45

### To add sites to a hierarchy record:

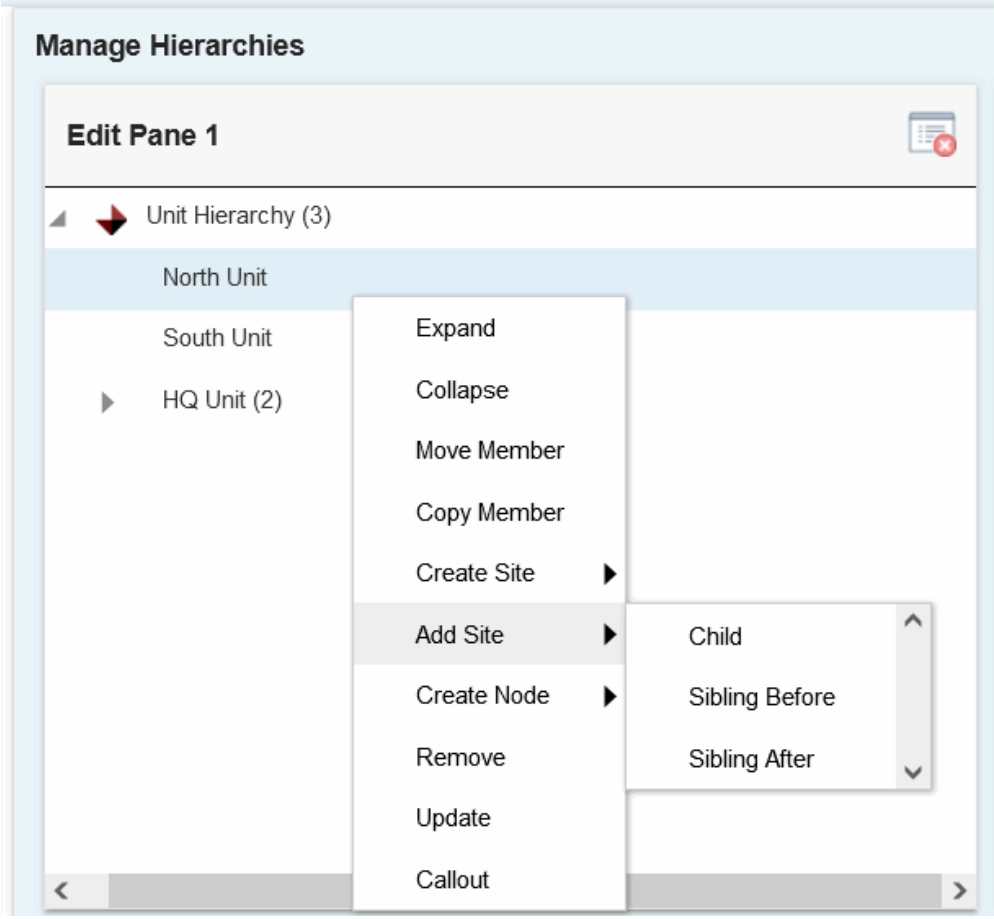
1. Select the Add Site icon.
2. Drag and drop the hierarchy in an edit pane.

3. Right-click the hierarchy and select Add Site.

   The Add Site dialog box appears.

   Select one of the following options to indicate where in the hierarchy you want the new site to be added:

   - Child
   - Sibling Before
   - Sibling After




4. Select a Search By value: Name or Number.

   - Name: Enter the value or a partial value + %.
   - Number: Enter the specific site number. If you do not know the specific site number, you can enter % and the system returns all records.

5. Select a record and choose Select to display it on the Hierarchy Workbench.

- Click the Select All check box to select all the records.
- Click the check box for the individual records to be added.

6. Click Apply to save your work.

   **Note:** When you click Apply, any changes made to the objects in both edit panes are saved.

7. Select the Update icon to navigate to the Update Site page to change details for the site record, see: Updating Site Records, page 5-26

   See: Hierarchy Workbench Navigation, page 7-16

### To create a node for a hierarchy record:

1. Select the Create Node icon
2. Select a record or area where you want to insert this new node, and right-click.

   Select one of the following options:

   - Child
   - Sibling Before
   - Sibling After

   The Create Node dialog box appears.

3. Enter the following information:
   - Name (required) - Unique value for the name of this node
   - Purpose (optional) - Destination of the node on the hierarchy
   - Description (optional)
4. Select OK to save your work.

   See: Hierarchy Workbench Navigation, page 7-16

## Hierarchy Workbench Navigation

The following table summarizes the Hierarchy Workbench navigation actions between the Edit panes.

Select (highlight) one or more objects (sites or nodes) in a hierarchy structure, and right-

click to select one of the menu transactions:

***Hierarchy Workbench Transactions***

| Transaction | Navigation |
|---|---|
| **Expand** | Expands the object to display any associated child records. |
| **Collapse** | Collapses the object to hide any associated child records. |
| **Move Member** | Select Move Member, and then select a destination node or site to add as a Child, Sibling Before or Sibling After the destination. |
| **Copy Member** | Select Copy, and then select a destination node or site to copy as a Child, Sibling Before or Sibling After. |
| **Create Site** | Select Create Site, and then select a destination node or site to create as a Child, Sibling Before or Sibling After.<br>Enter details. |
| **Add Site** | Select Add Site, and then select a destination node or site to add as a Child, Sibling Before or Sibling After.<br>Choose from the list of values. |
| **Create Node** | Select Create Node, and then select a destination to create as a Child, Sibling Before or Sibling After.<br>Enter details. |
| **Remove** | Select Remove. |
| **Update** | Select Update, and enter details. |

| Transaction | Navigation |
| --- | --- |
| **Callout** | Select to set up a custom page to enter transactions for your environment's requirements. The data on the panes is passed to the custom page.<br><br>See Custom Hierarchy Page, page B-1 for more information. |
| **Clear Edit Pane** | Click the Clear Edit Pane button to remove data in a pane. |

# A

# Navigation Paths

## Site Hub Navigation Paths

| Page Name | Navigation Path |
|---|---|
| Add Attribute Groups to Country | Site Management Administrator > Site Management Administrator > Setup > Locations > Assignments > [Attribute Groups tab] > [Add Attribute Group] |
| Add Attribute Groups to Hierarchy Purpose | Site Management Administrator > Site Management Administrator > Setup > Hierarchies > Assignments > [Attribute Groups tab] > [Add Attribute Group] |
| Add Attribute Groups to Site Purpose | Site Management Administrator > Site Management Administrator > Setup > Trade Areas > Assignments > [Attribute Groups tab] > [Add Attribute Group] |
| Add Attribute Groups to Trade Area Group | Site Management Administrator > Site Management Administrator > Setup > Trade Areas > Assignments > [Attribute Groups tab] > [Add Attribute Group] |
| Add to My Cluster | Site Management User > Site Management User > Site Home > Home > Clusters > Simple Search > [Select a record] > Add to My Cluster |

| Page Name | Navigation Path |
| --- | --- |
| Advanced Search | Site Management User > Site Management User > Site Home > Home > Hierarchies<br><br>Site Management User > Site Management User > Site Home > Home > Hierarchies > Advanced Search |
| Advanced Search Results | Site Management User > Site Management User > Site Home > Home > Hierarchies> Advanced Search > [select template] > [Go] > [select criteria] > [Search]<br><br>Site Management User > Site Management User > Site Home > Home > Sites > Advanced Search > [select template] > [Go] > [select criteria] > [Search] |
| Assignments | Site Management Administrator > Site Management Administrator > Setup > Hierarchies > Assignments<br><br>Site Management Administrator > Site Management Administrator > Setup > Locations > Assignments<br><br>Site Management Administrator > Site Management Administrator > Setup > Sites > Assignments<br><br>Site Management Administrator > Site Management Administrator > Setup >Trade Areas > Assignments |
| Attribute Group Details | Site Management Administrator > Site Management Administrator > Setup > Hierarchies > Attributes > [select Display Name record]<br><br>Administrator > Sites > Attributes > [select Display Name record]<br><br>Administrator > Locations > Attributes > [select Display Name record]<br><br>Administrator > Trade Areas > Attributes > [select Display Name record] |

| Page Name | Navigation Path |
|---|---|
| Clusters | Site Management User > Site Management User > Site Home > Home > Clusters |
| Copy Attribute Groups | Site Management User > Site Management User > Site Home > Home > Sites > Create > Create Site: Basic Information > [Copy from an existing site} > [select a site] > Enter required information] > [Select Attribute Groups for Copy] |
| Create Asset Instances | Site Management User > Site Management User > Site Home > Home > Sites > [Select records] > [Create Asset] |
| Create Attribute | Site Management Administrator > Site Management Administrator > Setup > Hierarchies > Attributes > [select a record] > Attribute Group Details > [Add Attribute]<br><br>Site Management Administrator > Site Management Administrator > Setup > Locations > Attributes > [select a record] > Attribute Group Details > [Add Attribute]<br><br>Site Management Administrator > Site Management Administrator > Setup > Sites > Attributes > [select a record] > Attribute Group Details > [Add Attribute]<br><br>Site Management Administrator > Site Management Administrator > Setup > Trade Areas > Attributes > [select a record] > Attribute Group Details > [Add Attribute] |
| Create Attribute Group for Hierarchy | Site Management Administrator > Site Management Administrator > Setup > Hierarchies > Attributes > Create |
| Create Attribute Group for Location | Site Management Administrator > Site Management Administrator > Setup > Locations > Attributes > Create |
| Create Attribute Group for Site | Site Management Administrator > Site Management Administrator > Setup > Sites > Attributes > Create |

| Page Name | Navigation Path |
| --- | --- |
| Create Attribute Group for Trade Area | Site Management Administrator > Site Management Administrator > Setup > Trade Areas > Attributes > Create |
| Create Country | Site Management Administrator > Site Management Administrator > Setup > Locations > Assignments > Attribute Pages tab > [Create Page] |
| Create Cluster | Site Management User > Site Management User > Site Home > Clusters > [Create] |
| Create Group | Site Management Administrator > Site Management Administrator > Setup > Role Security > User Groups > [Create Group] |
| Create Hierarchy: Basic Information | Site Management User > Site Management User > Site Home > Sites > Hierarchies > [Create] |
| Create Inventory Organizations | Site Management User > Site Management User > Site Home > Sites > [Select records] > [Create Inventory Organization] |
| Create Node | Site Management User > Site Management User > Site Home > Hierarchies > Hierarchy Workbench > [search for records] > [Create Node] |

| Page Name | Navigation Path |
|---|---|
| Create Page | Site Management Administrator > Site Management Administrator > Setup > Hierarchies > Assignments > [select Purpose] > [Go] > Attribute Pages tab > [Create Page]<br><br>Site Management Administrator > Site Management Administrator > Setup > Locations > Assignments > [select Country] > [Go] > Attribute Pages tab > [Create Page]<br><br>Site Management Administrator > Site Management Administrator > Setup > Sites > Assignments > [select Purpose] > [Go] > Attribute Pages tab > [Create Page]<br><br>Site Management Administrator > Site Management Administrator > Setup > Trade Areas > Assignments > [select Trade Area Group] > [Go] > Attribute Pages tab > [Create Page] |
| Create Role | Site Management Administrator > Site Management Administrator > Setup > Role Security > Roles > [Create Role line] |
| Create Property Locations | Site Management User > Site Management User > Site Home > Sites > [Select records] > [Create Property Location] |
| Create Site | Site Management User > Site Management User > Site Home > Sites > [Create] |
| Create Site: Basic Information | Site Management User > Site Management User > Site Home > Sites > [Create] > [Select a method] > [Create] |
| Create Site: Detail Information | Site Management User > Site Management User > Site Home > Sites> [Create] > [Select a method] > [Create] > [Enter values in required fields] > [Continue] |
| Create Template | Site Management User > Site Management User > Site Home > Sites >Templates > [Create] |

| Page Name | Navigation Path |
| --- | --- |
| Create Template: Basic Information | Site Management User > Site Management User > Site Home > Sites > Templates > [Create] > [choose method] > [Create] |
| Create Template: Detail Information | Site Management User > Site Management User > Site Home > Sites > Templates > [Create] > [choose method] > [Create] > Create Template: Basic Information > [enter required fields] > [Continue] |
| Create Trade Area Group | Site Management Administrator > Site Management Administrator > Setup > Trade Areas > Trade Area Groups > [Create] |
| Create Value Set | Site Management Administrator > Site Management Administrator > Setup > Miscellaneous > Maintain Value Sets > [Create} |
| Edit Attribute Groups for Hierarchy | Site Management Administrator > Site Management Administrator > Setup > Hierarchies > Attributes > [select a record] > Attribute Group Details > [Edit] |
| Edit Attribute Groups for Site | Site Management Administrator > Site Management Administrator > Setup > Sites > Attributes > [select a record] > Attribute Group Details > [Edit] |
| Edit Attribute Groups for Site Location | Site Management Administrator > Site Management Administrator > Setup > Locations > Attributes > [select a record] > Attribute Group Details > [Edit] |
| Edit Attribute Group for Trade Area | Site Management Administrator > Site Management Administrator > Setup > Trade Areas > Attributes > [select a record] > Attribute Group Details > [Edit] |
| Edit Group | Site Management Administrator > Site Management Administrator > Setup > Role Security > User Groups > [select User Group link] > Group Details > [Update] |

| Page Name | Navigation Path |
|---|---|
| Generate Database View | Site Management Administrator > Site Management Administrator > Setup > Sites > Attributes > [select a records] > Generate Database View<br><br>Site Management Administrator > Site Management Administrator > Setup > Locations > Attributes > [select a records] > Generate Database View |
| Geocoder | Site Management Administrator > Site Management Administrator > Setup > Map Preferences > Geocoder |
| Group Details | Site Management Administrator > Site Management Administrator > Setup > Role Security > User Groups > [select User Group link] |
| Hierarchies | Site Management User > Site Management User > Home > Hierarchies |
| Hierarchy Workbench | Site Management User > Site Management User > Site Home > Hierarchies> Hierarchy Search > [enter search criteria]<br><br>Site Management User > Site Management User > Site Home > Hierarchies > Hierarchy Workbench<br><br>Site Management User > Site Management User > Site Home > Home > My Hierarchies > Update My Hierarchies or Update Hierarchy |
| Requests | Site Management User > Site Management User > View Request Status |
| Import Format | Site Management Administrator > Site Management Administrator > Setup > Sites > Import Format |

| Page Name | Navigation Path |
| --- | --- |
| Maintain Unique Key | Site Management Administrator > Site Management Administrator > Setup > Locations > Attributes > [select a record] > Attribute Group Details > [Maintain Unique Key] |
| Maintain Value Sets | Site Management Administrator > Site Management Administrator > Setup > Miscellaneous |
| Map Preferences | Site Management Administrator > Site Management Administrator > Setup > Map Preferences > Map Preferences |
| My Clusters | Site Management User > Site Management User > Site Home > Home > My Clusters |
| My Hierarchies | Site Management User > Site Management User > Site Home > Home > My Hierarchies |
| My Sites | Site Management User > Site Management User > Site Home > Home > My Sites |
| Results Format | Site Management Administrator > Site Management Administrator > Setup > Sites > Results Format |
| Role Assignments | Site Management Administrator > Site Management Administrator > Setup > Role Security > Role Assignments |
| Role Details | Site Management Administrator > Site Management Administrator > Setup > Role Security > Roles > [select Role link] |
| Roles | Site Management Administrator > Site Management Administrator > Setup > Role Security > Roles |
| Person | Site Management Administrator > Site Management Administrator > Setup > Role Security > Roles > [select Last Updated By link] |

| Page Name | Navigation Path |
| --- | --- |
| Personalize Display Formats | Site Management User > Site Management User > Site Home > Home > Sites > Simple Search > Personalize |
| Search Coverage | Site Management User > Site Management User > Site Home > Home > Sites > Coverage Search<br><br>Site Management User > Site Management User > Site Home > Home > Sites > Site Search > [Select a record] > Coverage Search |
| Search Criteria | Site Management Administrator > Site Management Administrator > Setup > Sites > Search Criteria |
| Simple Search | Site Management User > Site Management User > Site Home > Home > Sites > Simple Search |
| Site Map | Site Management User > Site Management User > Site Home > Home > Sites > [select record] > View Site > [View Map] |
| Site Map Preferences | Site Management Administrator > Site Management Administrator > Setup > Map Preferences > Map Preferences |
| Templates | Site Management User > Site Management User > Site Home > Home > Sites > Templates |
| Trade Area Groups | Site Management Administrator > Site Management Administrator > Setup > Trade Areas > Trade Area Groups |
| Update Role | Site Management Administrator > Site Management Administrator > Setup > Role Security > Roles > [select Role link] > Role Details > [Update] |
| Update Site | Sites > [select record] > [Update] |

| Page Name | Navigation Path |
| --- | --- |
| Update Trade Area Group | Site Management Administrator > Site Management Administrator > Setup > Trade Areas > Trade Area Groups > [select a record] > [Update] |
| User Groups | Site Management Administrator > Site Management Administrator > Setup > Role Security > User Groups |
| View Cluster | Site Management User > Site Management User > Site Home > Home > Clusters > [enter search criteria] > [select record] |
| View Comparisons | Site Management User > Site Management User > Site Home > Home > Sites > Simple Search > [Select records] > Compare > [Go] |
| View Hierarchy | Site Management User > Site Management User > Site Home > Home > Hierarchies > [select criteria] > [Go} >[select a record] |
| View Site | Site Management User > Site Management User > Site Home > Home > Sites > [select record] |
| View Template | Site Management User > Site Management User > Site Home > Home > Sites > Templates > [select record] |
| View Trade Area Group | Site Management Administrator > Site Management Administrator > Setup > Trade Areas > Trade Area Groups > [select a record] |

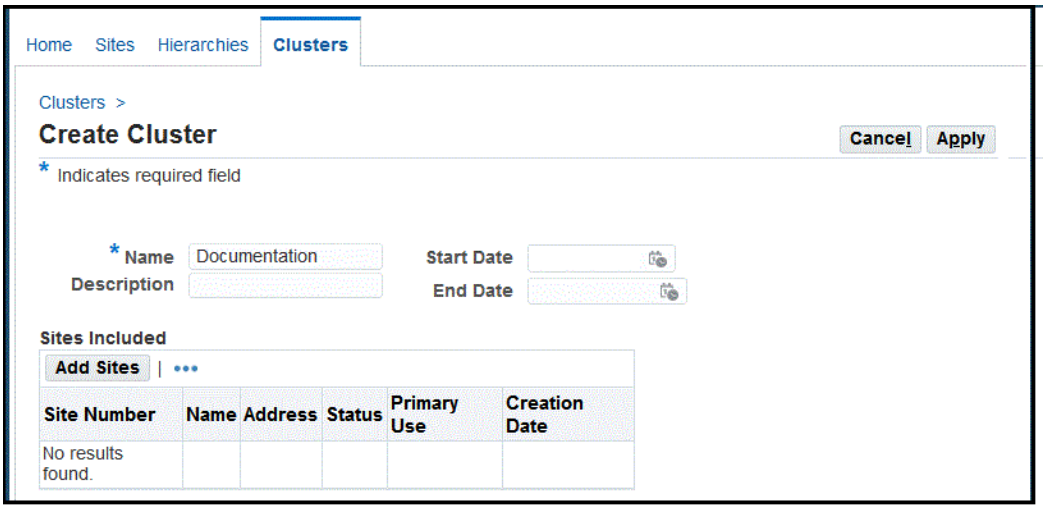
# B

# Custom Hierarchy Page

## Setting Up a Custom Hierarchy Page

You can set up a custom page for entering transactions for your environment's requirements. This page is accessed from the Hierarchy Workbench and enables data displayed on the panes to be passed to the custom page. You can perform a transaction on the custom page, and then navigate back to the Hierarchy Workbench.

Select Callout from the context menu for a hierarchy in the Hierarchy Workbench to navigate to the **Create Cluster** page.




**Note:** This functionality only moves data to Oracle Applications Framework pages and not other website pages.

### Setup

The profile option RRS: Hierarchy UI Custom URL is populated with the address for

the custom page.

Define the address for the custom page in the profile option using the following format, where CustomPG is the name of your page: /oracle/apps/rrs/site/user/webui/CustomPG

See: Profile Options, page 2-6

When the profile option has been defined, the Callout option appears in the context window for a hierarchy, node or site object in the Hierarchy Workbench.

1. Select a hierarchy, node, or site object. You can only select **one** object, not multiple objects in this feature.
2. Select Callout to navigate to the custom page.

### Parameters Passed To Custom Page

During navigation, relevant parameters are passed to the custom page depending on the object selected in the hierarchy structure. The following table shows hierarchy, site, and node parameters passed to the custom page:

***Hierarchy Object***

| Hierarchy in the Hierarchy List | Description |
|---|---|
| objectType | Type of object user selected, this value is hierarchy. |
| siteGroupId | Internal ID of the selected hierarchy. |
| siteGroupName | Name of the selected hierarchy. |

***Site Object***

| Site in Edit Pane | Description |
|---|---|
| objectType | Type of object user selected, this value is site. |
| siteId | Internal ID of the selected site. |
| siteIdNum | Identification number of the selected site. |
| siteName | Name of the selected site. |

| Site in Edit Pane | Description |
|---|---|
| siteGroupId | Internal ID of the hierarchy containing selected site. |
| siteGroupName | Name of the hierarchy containing selected site. |
| parentMemberType | Type of parent of selected site; values are site or node. |
| parentMemberId | Internal ID of parent of selected site. |
| parentMemberIdNum | Identification number of the parent of selected site. |

***Node Object***

| Node in Edit Pane | Description |
|---|---|
| objectType | Type of object user selected, this value is node. |
| nodeId | Internal ID of the selected node. |
| nodeIdNum | Identification number of the selected node. |
| nodeName | Name of the selected node. |
| siteGroupId | Internal ID of the hierarchy containing selected node. |
| siteGroupName | Name of the hierarchy containing selected node. |
| parentMemberType | Type of parent of selected node, values are site or node. |
| parentMemberId | Internal ID of parent of selected node. |
| parentMemberIdNum | Identification number of the parent of selected site. |

#### Parameters Passed Back to Hierarchy Workbench

When the custom Oracle Application page transaction is complete, and you navigate back to the Hierarchy Workbench, consider the following occurrences:

- In the processFormRequest method, the custom page will setForwardURL

  To:

  pageFunction = RRS_HIERARCHYCONTENTSPG_FN

- Set retainAM=Y to ensure the Hierarchy Workbench transaction state is not dropped.

- Ensure add_bread_crumb = Y

  > **Caution:** Avoid using add_bread_crumb = N as this will break subsequent navigation flows.

- If the custom page has a fresh transaction (no cached VO queries or transaction state), the next time you access the custom page—call pageContext. releaseRootApplicationModule() in processFormRequest immediately prior to the setForwardURL call.

- The Hierarchy Workbench can be directly accessed through page-level tabs. This standalone access requires additional parameters when returning from the custom page:

  - Custom Callout in Hierarchy Workbench will pass two additional parameters (standalone and selectedTab). If the Hierarchy Workbench is accessed from page-level tabs, the standalone is Yes. The selectedTab stores the currently selected menu function.

  - When the standalone is Yes, navigate back to Hierarchy Workbench using add_bread_crumb = N

**Sample of Return Call in processFormRequest:**

```
  //check whether it is navigated from the standalone workbench
  String standalone = pageContext.getParameter("standalone");
  String selectedTab = pageContext.getParameter("selectedTab");
  if(standalone != null && standalone.equalsIgnoreCase("Y")){
    pageContext.forwardImmediately("OA.jsp?OAFunc="+pageFunction +
"&OASF=" + selectedTab + OAHP=RRS_USER_HOME_PAGE_MENU",
                              null,
                              OAWebBeanConstants.KEEP_MENU_CONTEXT,
                              null,
                              null,
                              true,
                              OAWebBeanConstants.ADD_BREAD_CRUMB_NO);
//if navigate from the standalone workbench, need drop the breadcrumb
chain
    }
      else{
  pageContext.forwardImmediately("OA.jsp?OAFunc="+pageFunction +
"&OASF=" + selectedTab + "&OAHP=RRS_USER_HOME_PAGE_MENU",
                              null,
                              OAWebBeanConstants.KEEP_MENU_CONTEXT,
                              null,
                              null,
                              true,
                              OAWebBeanConstants.ADD_BREAD_CRUMB_YES);
}
```

# Index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