Retek® Retail Server™ 10.5

User Guide

Retek

Corporate Headquarters:

Retek Inc.
Retek on the Mall
950 Nicollet Mall
Minneapolis, MN 55403

888.61.RETEK (toll free US)
+1 612 587 5000

European Headquarters:

Retek
110 Wigmore Street
London
W1U 3RW
United Kingdom

Switchboard:
+44 (0)20 7563 4600

Sales Enquiries:
+44 (0)20 7563 46 46
Fax: +44 (0)20 7563 46 10

Customer Support

Customer Support hours:

Customer Support is available 7x24x365 via e-mail, phone, and Web access.

Depending on the Support option chosen by a particular client (Standard, Plus, or Premium), the times that certain services are delivered may be restricted. Severity 1 (Critical) issues are addressed on a 7x24 basis and receive continuous attention until resolved, for all clients on active maintenance.

Contact Method	Contact Information
Internet (ROCS)	www.retek.com/support Retek's secure client Web site to update and view issues
E-mail	support@retek.com
Phone	US & Canada: 1-800-61-RETEK (1-800-617-3835) World: +1 612-587-5800 EMEA: 011 44 1223 703 444 Asia Pacific: 61 425 792 927
Mail	Retek Customer Support Retek on the Mall 950 Nicollet Mall Minneapolis, MN 55403

When contacting Customer Support, please provide:

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

Contents

Chapter 1 – Introduction

Overview

Retail Server includes a suite of products that are closely integrated. The collection of products includes Retail Server Core Administration, WebTrack, Design, StyleBox, TopPlan, KeyPlan, and Assort.

Retail Server Core Administration™ is a tool that is geared toward administration of applications on retail.com. Retail Server Core Administration provides a common administration for all applications on retail.com. Through Retail Server Core Administration, you can complete the business process tasks that are described in the *Retail Server Core Administration business process* section.

System requirements

Note: Retek Retail Server as well as the other retail.com products will run on PC systems using the minimum configuration requirements listed below. However, better response times will be achieved using the recommended configurations. Running Web-based applications will stress entire connectivity far more than Web browsing.

PC

System component	Minimum Requirements	Recommended Requirements
Hardware	Pentium 233Mhz processor 128Mb RAM	Pentium 1.1Ghz processor 512Mb RAM
Desktop resolution	1024 x 768 pixels	1024 x 768 pixels
Operating system	MS Windows 95/98 or Windows NT 4.0 SP 3	MS Windows 98/2000 or Windows NT 4.0 SP 4 or above
Software	MS Internet Explorer 4.01 SP2 or above – downloadable from http://www.microsoft.com/ie	MS Internet Explorer 5.5 SP2 or above – downloadable from http://www.microsoft.com/ie
Internet connection	56K Internet connection	DSL/T1 or cable modem internet connection
Proxy servers	We advise customers to ensure that their servers are sufficiently well configured to support the number of users (for example, CPU speed, memory, network connectivity).	

Notes for PC users

For the PC version only, Retek Design 10.5 introduces an improved incremental search capability on drop-down list boxes. The new incremental search utility supports a string of characters to be used in a single lookup, instead of only considering the first character of the value. Specifically, you can start entering letters or numbers within the drop-down list box, and a value will appear in the selection, based on the set of characters being typed.

For example, a drop-down list box may include the following values: Austria, Bangladesh, Belgium, Canada, Denmark, Ecuador, France, and Germany. When you start typing “B”, the incremental search displays “Bangladesh” in the selection. If you continue to type “E”, the incremental search displays “Belgium” in the selection. Because the search utility supports a string versus only the first character of the value, “Belgium” is displayed instead of “Ecuador”. To start a different search, press the ESC key to start the search from the beginning of the list of values.

Retail Server Core Administration business process

Set up Enterprise

Modify the Enterprise code
Modify the Enterprise logo
View the subscribed services

Set up Locations and Users

Define the physical locations
Define the product/organization hierarchy
Administer user details
Administer trading partners

Set up Shared Data

Define colors
Define seasons
Define soft-coded terms used in fields throughout the application

Log in and launch

Overview

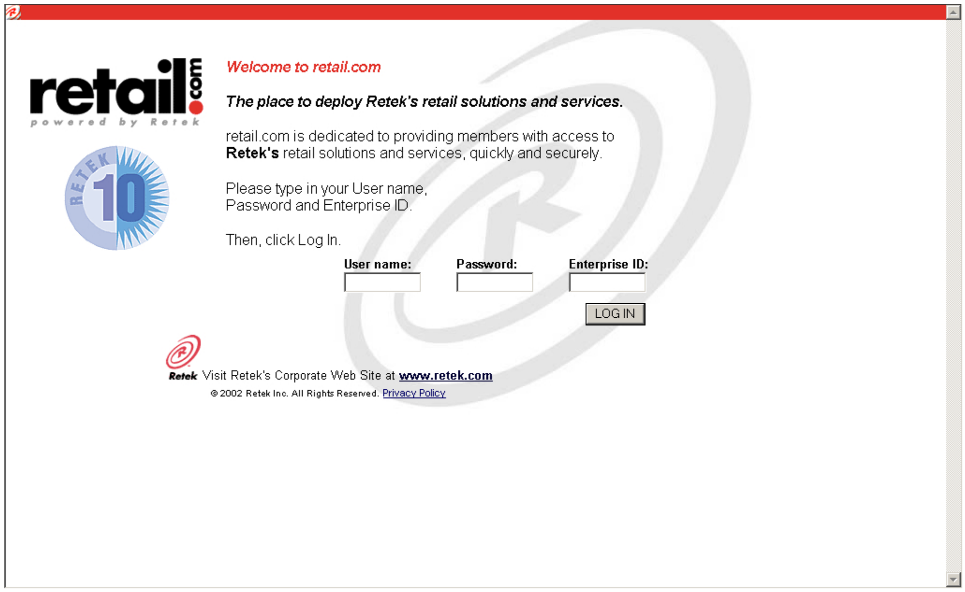
The retail.com and Retail Exchange Web sites have been seamlessly integrated and can be accessed with a single login. Thus, from www.retail.com, you might be able to access the following products:

- RetailExchange
- WebTrack
- Design
- StyleBox
- TopPlan
- KeyPlan
- Assort

The selection of subscriptions displayed on your personal front page depends on the enterprises to which you have subscribed.

Log in

1 In your Internet browser, go to www.retail.com.



www.retail.com Home Page

2 In the Members Login Here section of the page, in the username, password, and enterprise ID fields, enter your username, password, and enterprise ID.

Note: Your retail.com activation consultant should have supplied this information to you.

3 Click **Log In**.

Potential errors

The login process can potentially return several errors.

Login information not found

The username/password/enterprise ID combination that you used at the main retail.com login screen is invalid.

1 Click the try again link, or your browser’s back button, and retry the login.

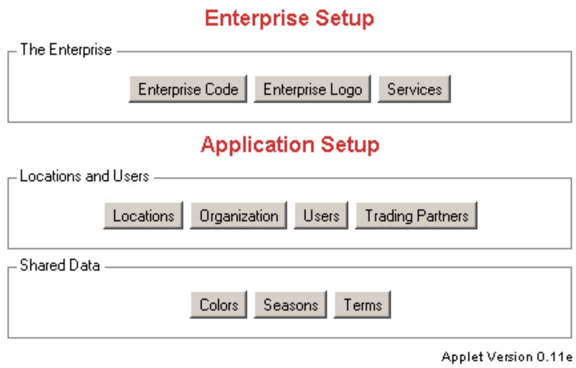
2 If you continue to get this error, check with your company’s system administrator for assistance.

Sorry for the inconvenience

Various possible errors can result in this error message.

Call or e-mail Customer Support for help.

Retail Server Core Administration overview



Administration Console

The Administration Console consists of the following areas and sub-areas:

- Enterprise Setup
  - The Enterprise
- Application Setup
  - Locations and Users
  - Shared Data

Enterprise setup

In the Enterprise setup section, you can:

- Modify the **enterprise code** (used at login).
- Modify the **enterprise logo**.
- View the subscribed **services**.

Application setup

Locations and users

In the **Application setup** section, under **Locations and users**, you can:

- Define the **countries** and currencies in which the enterprise does business.
- Define the physical **locations** of entities that are affiliated with the enterprise, such as the headquarters, factories, stores, etc.
- Define the product (**organization** / user) hierarchy, in order to scope user responsibility.
- Administer **user** details.
- Administer **trading partners** by invitation.

Shared data

In the **Application setup** section, under **Shared data**, you can:

- Define **colors**.
- Define **seasons**.
- Allow the soft definition of fields (**terms**) used throughout the applications.

Security upgrade

The security features of retail.com are as follows:

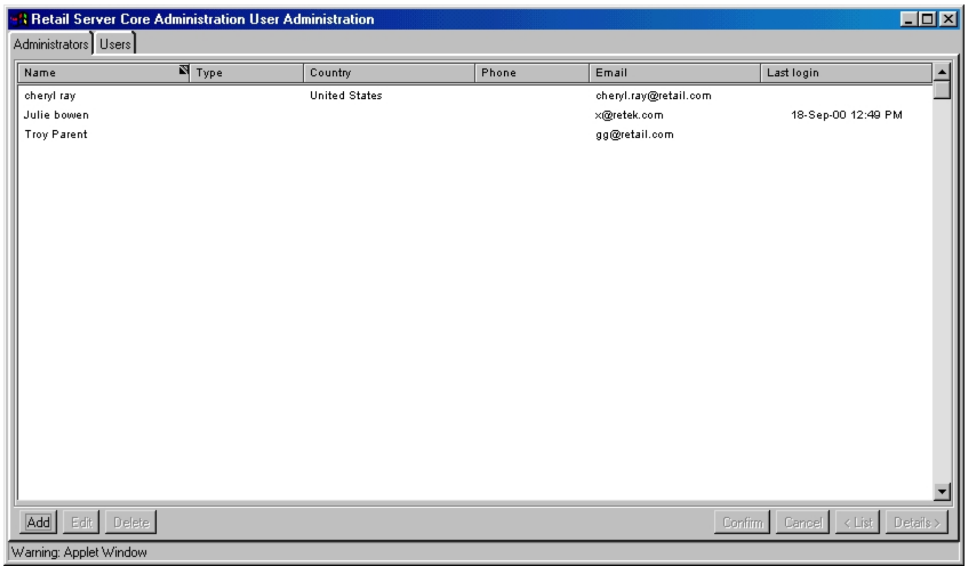
- Password restrictions:
  - Passwords must be six characters or more.
  - Passwords must be at least five different characters.
  - Passwords must not be simple (for example, sequences such as abcde are restricted to a maximum of four characters).
  - Common patterns are prohibited (for example, national insurance numbers, social security numbers).
  - Passwords must not be easily derivable from the user name or full name.
  - Passwords must not be easily derivable from the previous password.
  - Passwords must not be derivable from a dictionary entry.
- Changing your password
  - You can change your own password.
  - Administrators can set new user passwords, but cannot see the current user password. See the *Set new user password* procedure.
- An administrative option to lock out users has been added. See the *Lock out a user* procedure.
- An administrative option has been added to force a user to change their password on their next login. See the *Force password change* procedure.
- Exchange (Retek) - level improvements have been made:
  - Password ageing was added, allowing passwords to be set to expire after a certain number of seconds, minutes, hours, or days.
  - Password cycling was added, preventing passwords from being re-used for a minimum of a certain number of days or a certain number of changes.
  - An option for failed login lockouts was added: after a certain number of failed logins, the user is locked out for a certain amount of time.
  - A new table was added, which captures details of security changes and logons for auditing purposes.
  - Authentication encryption (via https session) and cookie encryption were added.
  - Idle session expiration has been added, allowing a session to be logged out after a certain amount of idle time.

Procedures

- Set new user password
- Lock out a user
- Force password change

Set new user password

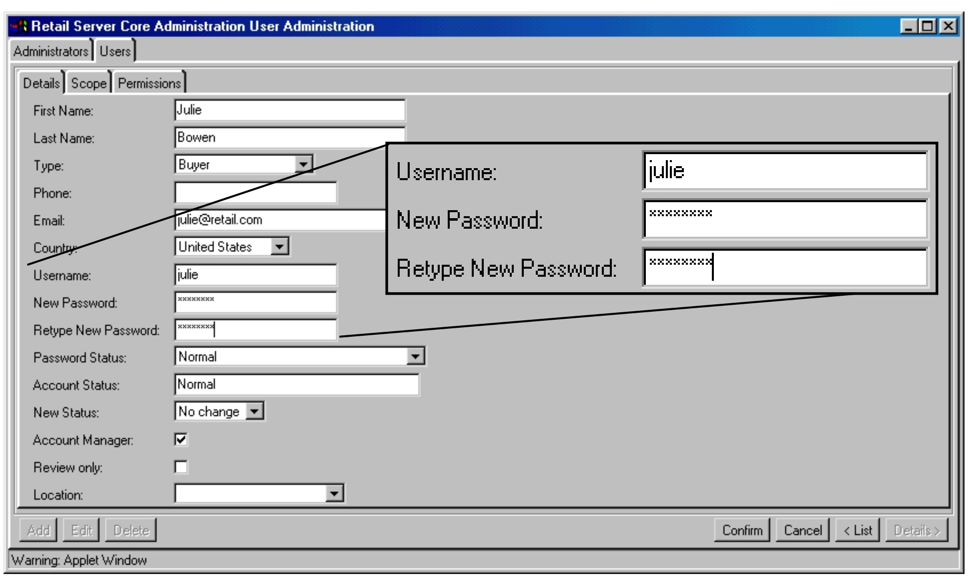
➲ **Navigate:** On Retail Server Core Administration's Administration Console, under Application Setup → Locations and Users, click the **Users** button. The User Administration window is displayed.



1 Click on the Users tab. The list view of the Users tab is displayed.

2 Select the user name whose password you wish to change.

3 Click the **Edit** button. The Details tab is displayed.



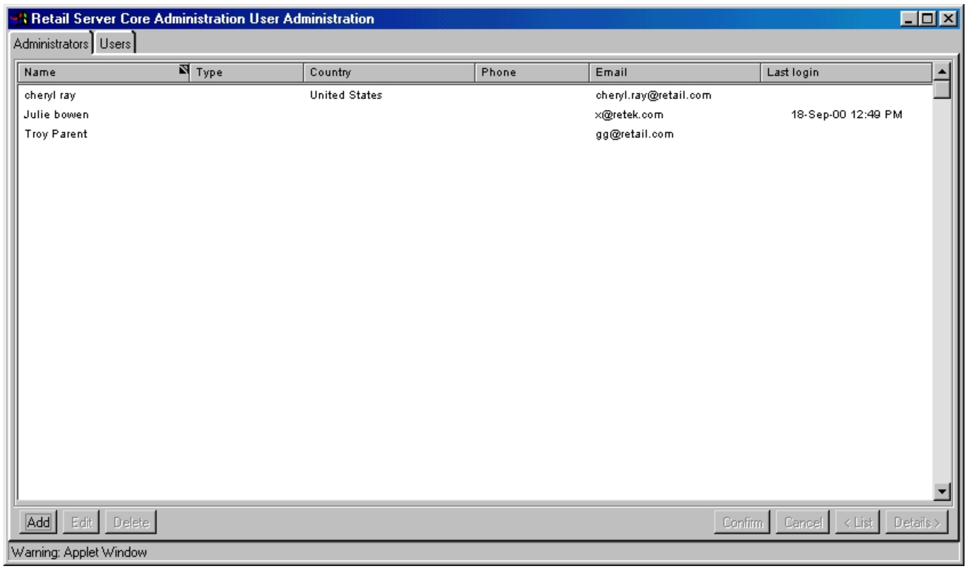
4 In the New Password field, enter the new password.

5 In the Retype New Password field, re-enter the new password.

6 Click the **Save** button to save the information to the database.

Lock out a user

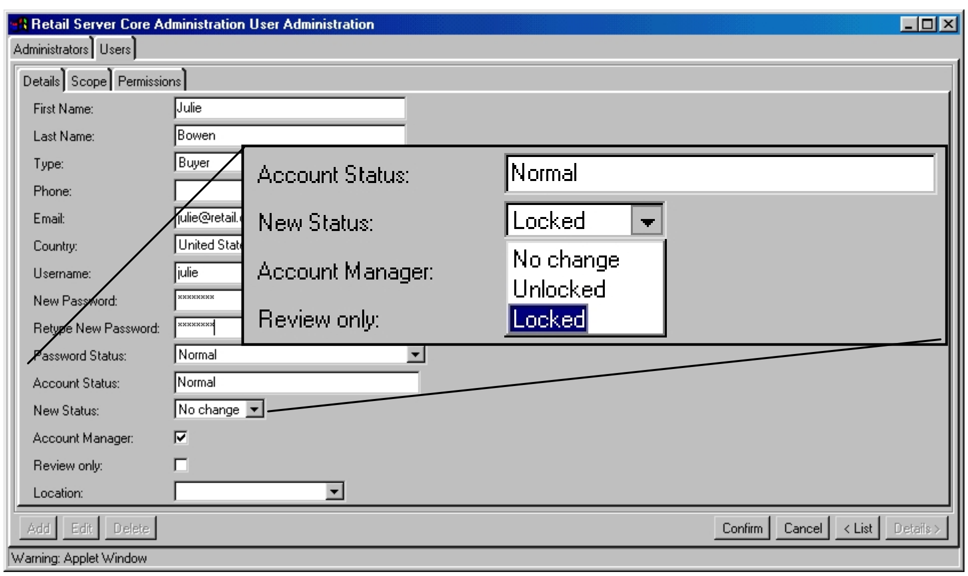
➲ **Navigate:** On Retail Server Core Administration's Administration Console, under Application Setup → Locations and Users, click the **Users** button. The User Administration window is displayed.



1 On the User Administration window, click on the Users tab. The list view of the Users tab is displayed.

2 Select the name of the user who you wish to lock out.

3 Click the **Edit** button. The Details tab is displayed.



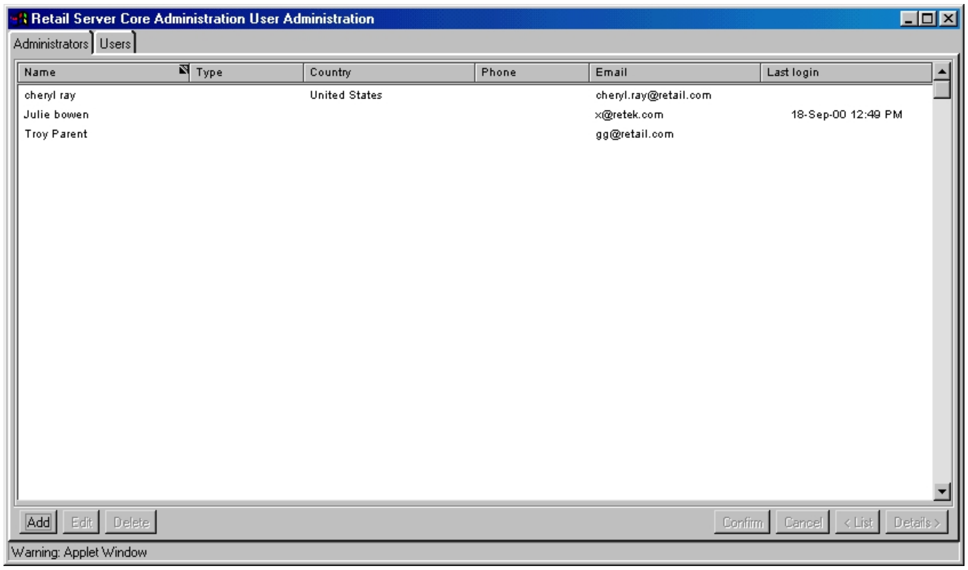
4 In the New Status field, select Locked from the drop-down list.

5 Click the **Save** button to save information to the database. The Account Status field changes to Permanent Lock.

Note: The user will be locked out upon their next attempted login. If the user is currently logged in, this will only take effect after they have logged out and attempt to log in again.

Force password change

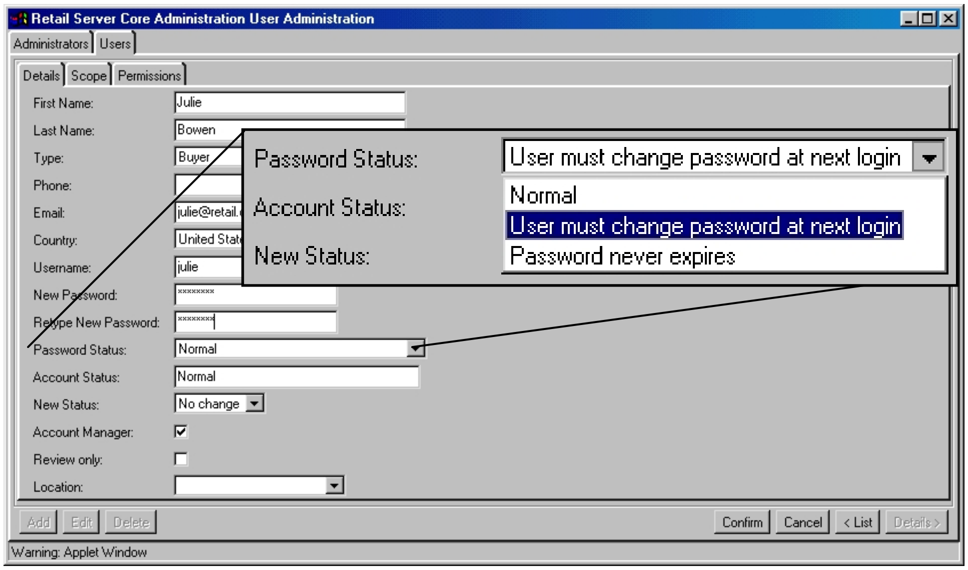
➲ **Navigate:** On Retail Server Core Administration's Administration Console, under Application Setup → Locations and Users, click the **Users** button. The User Administration window is displayed.



1 On the User Administration window, click on the Users tab. The list view of the Users tab is displayed.

2 Select the name of the user who you wish to lock out.

3 Click the **Edit** button. The Details tab is displayed.



4 In the Password Status field, select User must change password at next login from the drop-down list.

5 Click the **Save** button to save information to the database.

Chapter 2 – Set up enterprise

To set up your enterprise, you enter your enterprise code (that is, company password) and place your company logo on your retail.com Web site.

Enterprise setup includes:

- Enterprise code: a unique identifier for your enterprise
- Enterprise logo: your enterprise's logo
- Services: a list of enabled, related retail.com services

Enterprise code

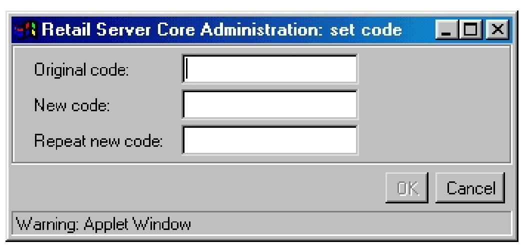
Overview

To set up the enterprise with retail.com, the Company Administrator must set up the enterprise code. This code identifies all users within your company for retail.com. All users in your organization use it as a password for retail.com products and services.

Retail.com assigns an initial code to your company when it first signs up for any solution. Change this code to something that is easy for your users to remember and use as a password (such as the company name).

To perform the following procedure:

➲ **Navigate:** On the Administration Console, Under Enterprise Setup → The Enterprise, click the **Enterprise Code** button. The Set Code window is displayed.



Procedure

Change your enterprise code

1. In the Original code field, enter the existing enterprise code.
2. In the New code field, enter the new enterprise code.
3. In the Repeat new code field, re-renter the new enterprise code.
4. Click the **OK** button to save the new enterprise code.
5. To discard your changes and restart the procedure, click the **Cancel** button.

Field descriptions

Field Name	Field Description
Original code	The Enterprise code for your organization that is initially supplied by retail.com.
New code	The code that you assign as a password for all users at your company.
Repeat new code	The code that you assign as a password for all users at your company. To verify your code, the system requires that you repeat it in this field.

Button descriptions

Button Name	Button Description
OK	To save your changes, click **OK**.
Cancel	To discard your changes and restart the procedure, click the **Cancel** button.

Enterprise logo

Overview

Enterprise Logo allows administrators to set their own company logo to appear in the top right-hand corner of the retail.com windows for all your Enterprise users.

To perform the following procedure:

➲ **Navigate:** On the Administration Console, Under Enterprise Setup → The Enterprise, click the **Enterprise Logo** button. The Set Logo window is displayed.

Procedure

Add your company logo

Note: You must set up your Web browser to upload images from your computer to retail.com. For instructions, see *Appendix A – Set up Web Browsers*.

1 On the Set Logo window, click the **Choose Logo** button.

2 Select the file containing the image of your logo. This file must be in one of these formats: .gif, .jpeg, or .jpg.

3 Click the **Open** button.

4 Click the **Update Logo** button. The logo will appear the next time you access retail.com.

Note: After you click the Update Logo button, you cannot cancel your changes.

Field descriptions

There are no pertinent field descriptions for this topic.

Button descriptions

Button Name	Button Description
Cancel	Stops the process being performed without saving any changes.
Choose Logo	Lets you choose an image for your company logo from your computer.
Update Logo	Places the logo you have chosen at the top right of your window.

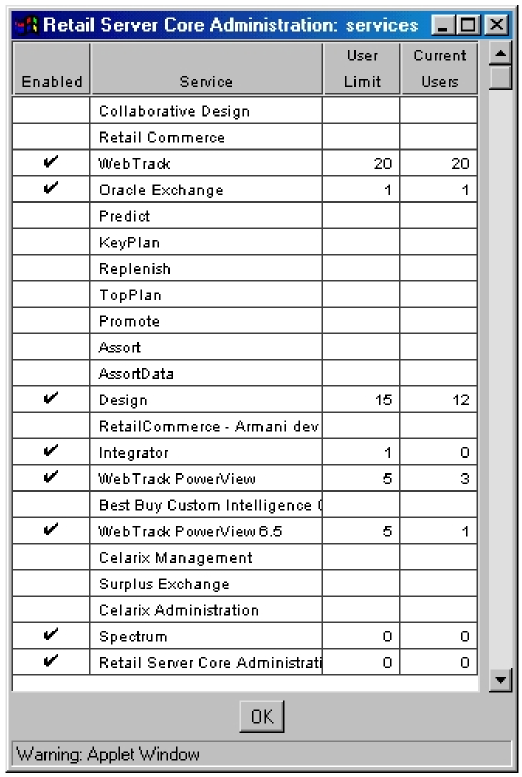
Services

Overview

Your Enterprise's e-service license agreement with Retail Server Core Administration defines the number of users you will be able to assign. You can view this information in The Services window.

To perform the following procedure:

➲ **Navigate:** On the Administration Console, Under Enterprise Setup → The Enterprise, click the **Services** button. The Services window is displayed.



Note: The Services window is a read-only window.

Procedure

View retail.com e-services subscription information

1. On the Services window, you can do the following:
   a. View the list of e-services that are available to your Enterprise for subscription.
   b. View the subscription information for your enterprise. A check mark in the Enabled column indicates that you can access that e-service in your current subscription agreement.
   c. View the number of users at your Enterprise that can use each e-service.

   Note: The software license counts each user once, even if an administrator has two passwords, one to log in as the administrator, another to log in as a user.

   d. View the current number of users at your Enterprise configured for each e-service.
2. To change your service user limit, contact support@retail.com.
3. After viewing the information, click **OK** to close the window.

Field descriptions

Field Name	Field Description
Enabled	A checkmark in this column indicates that your Enterprise has a subscription to this e-service.
Services	This list documents the services provided in your subscriber contract.
User Limit	The number of participants allowed by your subscriber contract.
Current Users	The number of participants in your organization who are currently configured to use each e-service.

Button descriptions

Button Name	Button Description
OK	Click **OK** to close the Services window.

Chapter 3 – Set up locations and users

Locations and users includes:

- Locations
- Organization
- Users
- Trading Partners

Locations

Overview

The Locations Administration function is used to specify where your users are physically located. Use the Locations Administration windows to designate which locations should be displayed in the location lists in retail.com windows. The list view of the Locations Administration window displays all the locations where your company conducts business, with information about each location. Locations can include factories, stores, distribution centers, and so on.

You can select a location and click the Details button to display the details view of the Locations Administration window. This window contains detailed information for the selected location.

To perform the following procedures:

➲ **Navigate:** On the Administration Console, Under Application Setup → Locations and Users, click the **Locations** button. The list view of the Locations Administration window is displayed.

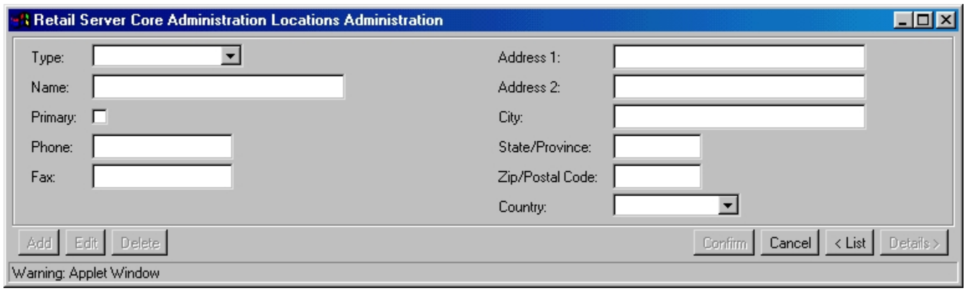
Procedures

- Add a location
- Edit a location
- Delete a location

Note: You cannot delete a location that is currently in use.

Add a location

1 On the list view of The Locations Administration window, click the **Add** button. The details view of the Locations Administration window is displayed. The entry fields are enabled.



2 Enter the relevant information in the fields. See the *Field descriptions* at the end of this section for clarification, if necessary. Entries are required for these fields:

- Type
- Name

3 Click the **Save** button. The new location is added to the database.

4 Click the **List** button to return to the list view. The new location is displayed on the list.

Edit a location

1 On the list view of the Locations Administration window, select the location. The location is highlighted.

2 Click the **Edit** button. The details view of the Locations Administration window is displayed with its fields enabled.

3 Modify the records for the selected location.

4 Click the **Save** button to save the changes to the database.

5 Click the **List** button to return to the list view. The modified location is displayed on the list.

Delete a location

1. On the list view of the Locations Administration window, click the name of the location that you wish to delete.

   Note: You cannot delete a location that is currently in use.

2. Click the **Delete** button. A dialog box is displayed to confirm your decision.
3. To proceed, click **OK**. The location is permanently deleted from the list and the database.
4. Click the **List** button to return to the list view. The location is no longer listed.

Field descriptions

Note: In the list view of the Locations Administration window, all column headers are sort buttons. To sort or prioritize the data in a column, click the column header.

Field Name	Field Description
Address 1, 2 — details view	The primary and secondary address at the location.
City — details view	City of the location.
Country (both)	Country of the location. On the details view of the Locations Administration window, if the required country is not in the drop-down list, return to the Country Name Administration window and add the country name or verify that it is marked as Active. See the Set up countries procedure.
Fax (both)	Fax number at the location.
Name (both)	An entry is required when you add a location to the list. Identify the location.
Phone (both)	Phone number at the location.
Primary (both)	No current function. Leave blank.
State/province — details view	State or province of the location.

Field Name	Field Description
Type	An entry is required when you add a location to the list. The primary business activity at the location. The Type drop-down list on the details view of the Locations Administration window contains these values: • Headquarters • Manufacturing • Plant • Retail Outlet • Sales Office • Warehouse If you require additional values for Type, contact support@retail.com.
Zip/postal code — details view	Zip or postal code at the location.

Button descriptions

Button Name	Button Description
New	Click the **New** button to add a new location to the list. See the Add a Location procedure.
Cancel	Click the **Cancel** button to discard changes you made since the last time you clicked Save.
close button	To exit the window, click the close button in the upper-right corner.
Save	After you add, edit, or delete, click the **Save** button to save the changes. When you perform add or edit procedures, the **Save** button is not enabled unless there are entries in all required fields.
Delete	Use the **Delete** button to permanently delete a location from the database. See the *Delete a location* procedure.
Details	Click the **Details** button to display the Locations Administration Details window.
Edit	Click the **Edit** button to edit the fields for the location selected in the Locations Administration list window. See the *Edit a location* procedure.
List	Click the **List** button to redisplay the Locations Administration List window.

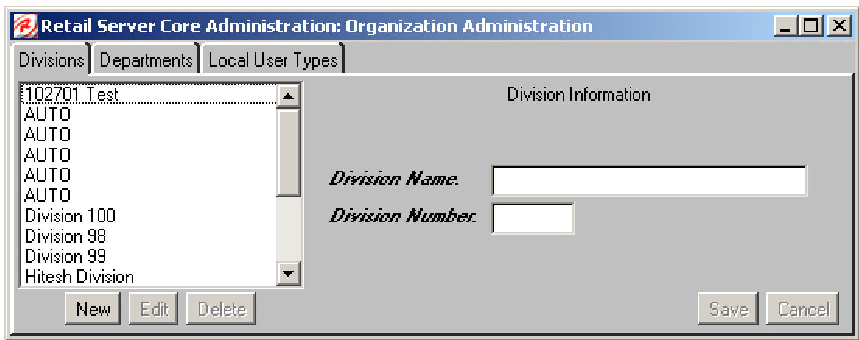
Organization

Overview

You use the Organization Administration function to identify the divisions and departments in your Enterprise that will use retail.com. The names are displayed in retail.com drop-down lists. You can then assign users to the divisions and departments in your Enterprise. The classes and departments of products that will be designed are also entered in this procedure.

To perform the following procedures:

➲ **Navigate:** On the Administration Console, under Application Setup → Locations and Users, click the **Organization** button. The Organization Administration window is displayed.



Procedures

- Add a division
- Edit a division
- Delete a division

Note: You cannot delete a division that is currently in use.

- Add a department
- Edit a department
- Delete a department

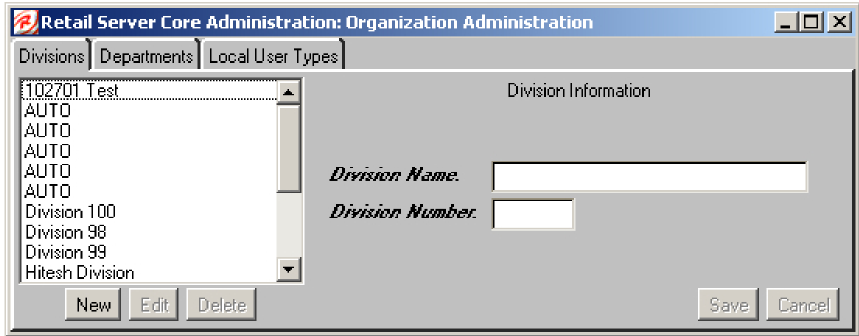
Note: You cannot delete a department that is currently in use.

- Add a local user type
- Edit a local user type
- Delete a local user type

Note: You cannot delete a local user type that is currently in use.

Add a division

1 On the Divisions tab, click the **Add** button. The entry fields at the right are enabled and Add Division is displayed above them.



2 In the Division Name field, enter the name of the new division.

3 In the Division number, enter the number that identifies this division.

4 Click the **Save** button. The database is updated with the new entry.

5 Verify that the new division name is displayed in the list.

Edit a division

1 On the Divisions tab, select the name of the division in the list that you want to edit.

2 Click the **Edit** button. The entry fields at the right are enabled and Edit Division is displayed above them.

3 Modify the information in the entry fields.

4 Click the **Save** button. The database is updated.

Delete a division

1 On the Divisions tab, select the name of the division in the list that you want to delete.

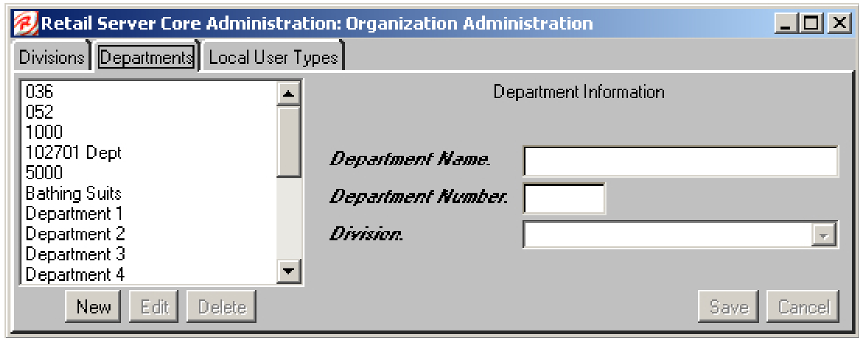
Note: You cannot delete a division that is currently in use.

2 Click the **Delete** button. A dialog box is displayed to confirm your decision.

3 To proceed, click **OK**. The division is deleted from the list.

Add a department

1 On the Organization Administration window, click on the Departments tab. A list of departments and Department Information fields are displayed.



2 Click the **New** button. The fields to the right are enabled. Add Department is displayed above the fields.

3 In the Department name field, enter the name of the new department.

4 In the Department number field, enter the number that will be used to identify this new department.

5 In the Division field, select the division associated with this new department from the drop-down list.

6 Click the **Save** button. The database is updated with the new entry. The list is displayed with the new department highlighted in the list.

Edit a department

1 On the Organization Administration window, click on the Departments tab. A list of departments and Department Information fields are displayed.

2 Select the department name to edit

3 Click the **Edit** button. The fields to the right are enabled. Edit Department is displayed above them.

4 Modify the information as necessary.

5 Click the **Save** button. The database is updated with the changes.

Delete a department

1 On the Organization Administration window, click on the Departments tab. A list of departments and Department Information fields are displayed.

2 Select the department name to delete.

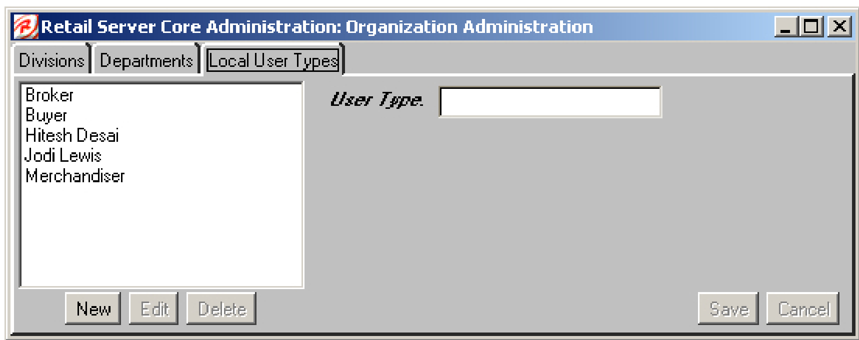
Note: You cannot delete a department that is currently in use.

3 Click **Delete**. A dialog box is displayed to confirm your decision.

4 To proceed, click **OK**. The department is deleted from the list.

Add a local user type

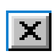
1 On the Organization Administration window, click on the Local User Types tab. A list of user types and the User Type field is displayed.



2 Click **New**.

3 In the User Type field, enter the role you want to assign to users.

4 Click **Save**. The database is updated with the new entry.

5 Click the close  button to save your changes and close the window.

Edit a local user type

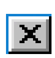
1 On the Organization Administration window, click on the Local User Types tab.

2 Select the user type to edit. The user type is highlighted.

3 Click **Edit**.

4 Edit the enabled fields as necessary.

5 Click **Save**. The database is updated with the changes.

6 Click the close  button to save your changes and close the window.

Delete a local user type

1 On the Organization Administration window, click on the Local User Types tab.

2 Select the user type to delete. The user type is highlighted.

3 Click **Delete**. A dialog box is displayed to confirm your decision.

4 To proceed, click **OK**. The department is deleted from the list.

5 Click the close  button to save your changes and close the window.

Field descriptions

Divisions tab

Use this tab to add, edit, or delete the divisions that are displayed in retail.com Division drop-down lists.

Field Name	Field Description
Division list	The names of all available divisions in alphabetical order.
Division name	An entry is required. The name of the division. This name is displayed in retail.com Division drop-down lists.
Division number	An entry is required. The unique number that identifies the division.

Departments tab

Use this tab to add, edit, or delete the departments that are displayed in the retail.com Departments drop-down lists.

Field Name	Field Description
Departments list	The names of all available departments in alphabetical order.
Department name	An entry is required. The name of the department. This name is displayed in retail.com Department drop-down lists.
Department number	An entry is required. The unique number that identifies the department.
Division	An entry is required. The drop-down list contains division names.

Local User Types tab

Field Name	Field Description
Local User Type List	The names of all available local user types in alphabetical order.
Local User Type	An entry is required. The name of the local user type.

Button descriptions

Button Name	Button Description
New	Click the **New** button to: • Add a new division to your Enterprise — See the *Add a division* procedure. • Add a new department to your Enterprise — See the *Add a department* procedure. • Add a new local user type to your Enterprise - See the *Add a local user type* procedure.
Edit	Division — To edit a division, select it and click the **Edit** button. See the *Edit a division* procedure. Department — To edit a department, select it and click the **Edit** button. See the *Edit a department* procedure. Local User Type **-** To edit a local user type, select it and click the Edit button. See the Edit a department procedure.
Delete	Use the **Delete** button to permanently remove a department or division from the list. • Division — See the *Delete a division* procedure. • Department — See the *Delete a department* procedure. • Local User Types **-** See the Delete local user types procedure.
Help	Click the **Help** button to display Company Administration Help.
Save	After you add or edit, click the **Save** button to save the changes. When you perform add or edit procedures, the **Save** button is not enabled until there are entries in all required fields.
Cancel	Click the **Cancel** button to discard your changes.
close button	To exit the window, click the close button in the upper-right corner.

Users

Overview

The Company Administrator can access the User Administration function to assign authority levels to all users.

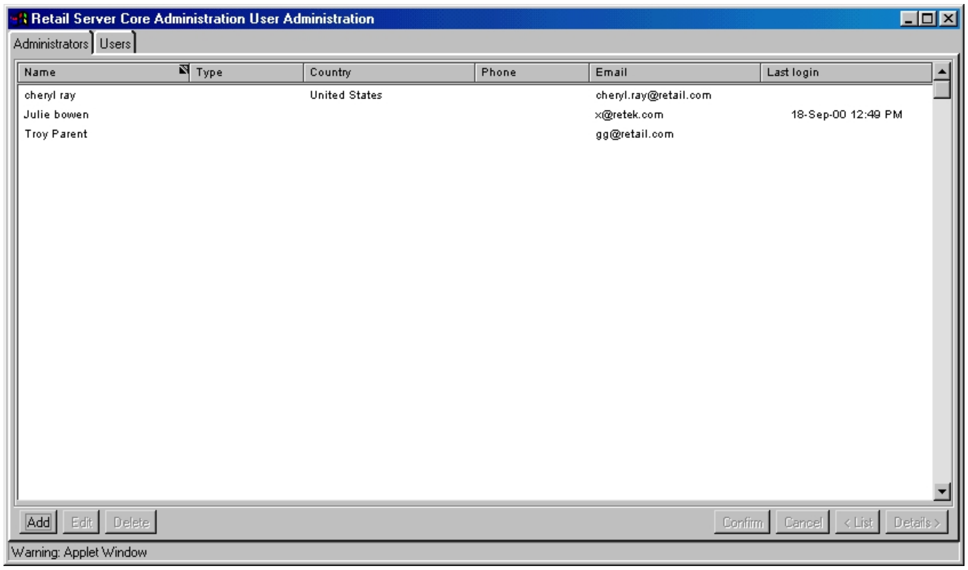
Authority Levels	Authority Descriptions
Administration	The Company Administrator can access the Administration Console to set up the Enterprise on retail.com, make organizational changes for the entire Enterprise, identify all users of retail.com, assign passwords, define user authorities and responsibilities, and reassign one user's tracks to another user.
User	Users can access the User Console, and use retail.com applications.

In the following procedures, you will accomplish the following:

- Determine the number of e-service users who may use the retail.com software. Your enterprise's e-service license agreement with retail.com defines the number of users you will be able to assign.
- Enter in the names and contact information of the people who will be using the retail.com application.
- Assign a User or Administrator function to a person. A unique password is used to allow system access. The Administrator function allows full authority to make organizational changes that affect the entire enterprise. This occurs on the Administration Console. Users access the User Console, where the collaborative product design occurs. Users have a defined scope of responsibility. The number of Users that can be assigned is determined by the license purchased. An Administrator may have a User password as well, but the software license counter still counts him or her just once.
- Define the scope of responsibility for each User.

To perform the following procedures:

➲ **Navigate:** On the Administration Console, under Application Setup → Locations and Users, click the **Users** button. The User Administration window is displayed.



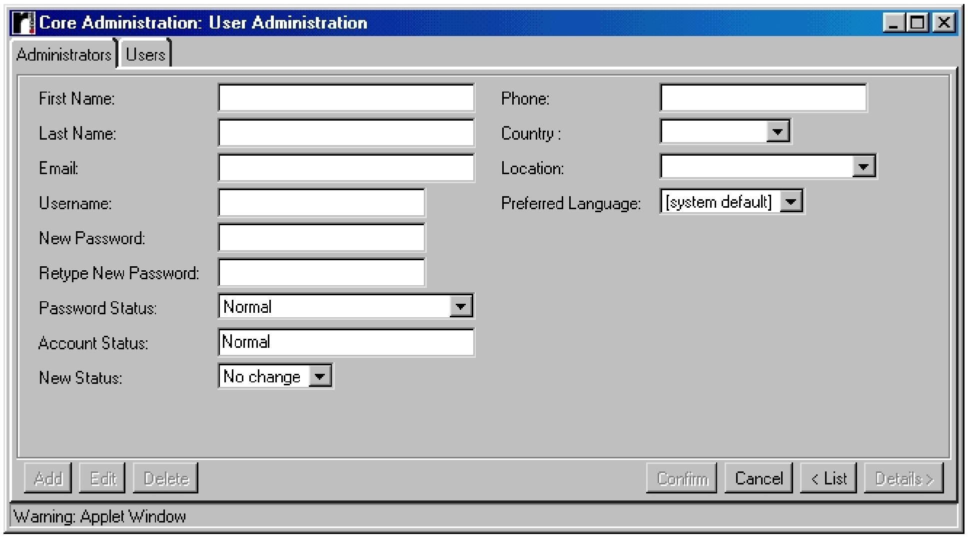
Procedures

- Add an administrator
- Edit an administrator
- Delete an administrator
- Add a user
- Edit a user
- Delete a user

Add an administrator

1 On the User Administration window, click on the Administrators tab. The list view of the Administrators tab is displayed.

2 Click the **New button**. The details view of the Administrators tab is displayed. The entry fields are enabled.



3 Enter information in the fields, or select the appropriate option from the drop-down list. Required fields are:

- First Name
- Last Name
- Email
- Username
- New Password
- Retype New Password

Note: The Password Status and Account Status fields default to No Change, and the Preferred Language field defaults to the system's default language, if nothing else is specified.

Note: The **Save** button is not enabled until all required entries are made.

4 Click the **Save** button.

This administrator can now sign on and access the Administration Console with the designated username, password, and Enterprise code.

Edit an administrator

1. On the User Administration window, click on the Administrators tab. The list view of the Administrators tab is displayed.
2. Select the name of an administrator.
3. Click the **Edit** button. The detail view of the Administrators tab is displayed. The entry fields are enabled.
4. Select the fields you wish to modify, and change the information.
5. Click the **Save** button to save the changes.

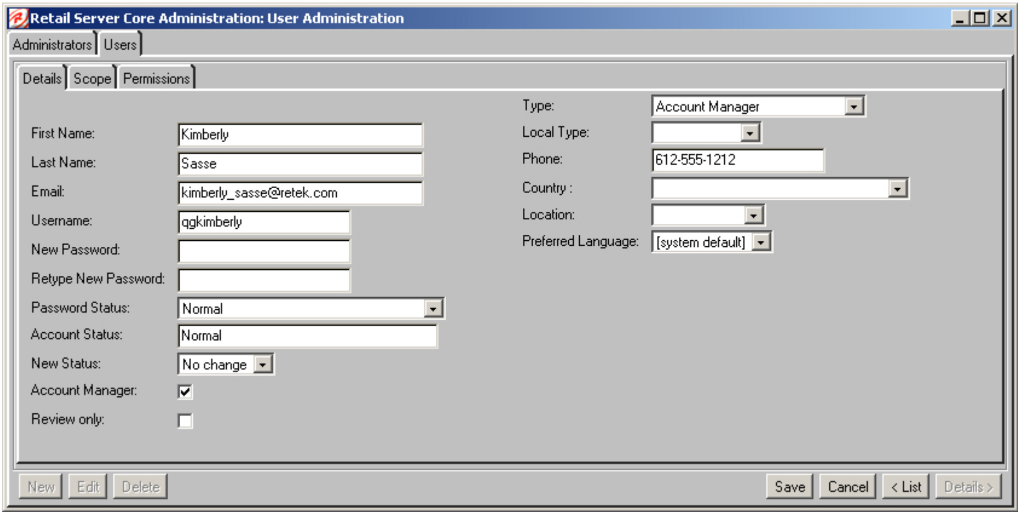
Delete an administrator

1. On the User Administration window, click on the Administrators tab. The list view of the Administrators tab is displayed.
2. Select the name of an administrator.
3. Click the **Delete** button. A dialog box is displayed to confirm your decision.
4. To proceed, click the **OK** button. The administrator's name is deleted from the list.

Add a user

1 On the User Administration window, click on the Users tab. The list view of the Users tab is displayed.

2 Click the **New button**. The Details, Scope, and Permissions tabs are displayed. Entry fields on the Details tab are enabled.



3 Enter the information about the new user. Entries are required in these fields:

- First Name
- Last Name
- Type
- Phone
- Email
- Country
- Username
- New Password
- Retype New Password

Note: The Password Status and Account Status fields default to No Change, and the Preferred Language field defaults to the system's default language, if nothing else is specified.

4 Select or clear the Account Manager check box:

When selected, trading partners can see users in your Enterprise and assign tracks to them. When cleared, the trading partner is unable to see this user and cannot assign tracks.

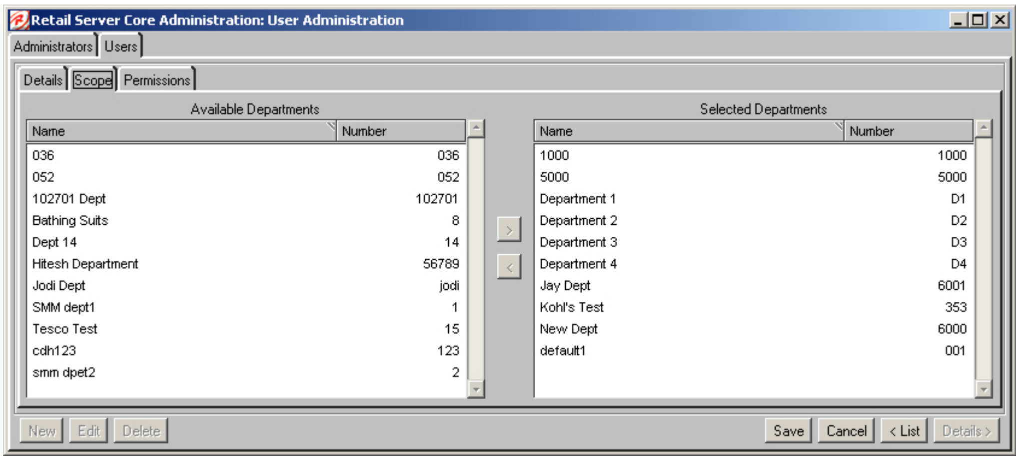
5 Select or clear the Review Only check box:

When selected, the user has read-only access, and cannot edit or update retail.com applications.

When cleared, the user can edit and update in retail.com applications.

6 Select items for Type, Country, and Location from the drop-down lists.

7 Click on the Scope tab. The Scope tab is displayed.

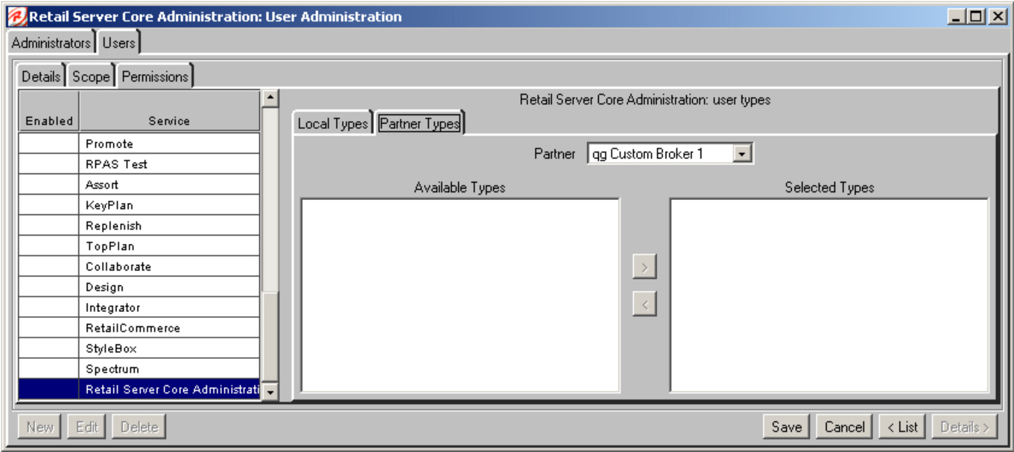


8 In the Available Departments list, click a department name to be assigned to the user.

9 Click the right arrow button to move the department to the Selected Department list.

10 To remove a department from the Selected Department list, select the department name. Click the left arrow button. The department is returned to the Available Department list.

11 Click on the Permissions tab. The Permissions tab is displayed.



12 Click in the Enabled column to select the corresponding service in the Service column. The Available Types column lists the user roles for your Enterprise.

13 In the User Types area, select the Local Types tab or the Partner Types tab. Defined user roles are displayed.

- If you select Partner Type, in the Partner field, select the partner you are defining permissions for.

14 In the Available Types list, select the role that applies to this user. When you select a role, the right arrow at the center of the window is enabled.

15 Click the right arrow button to move the role to the Selected Types list. To remove a role from the Selected Types List, select the role. The left arrow at the center of the window is enabled. Click the left arrow button to return the role to the Available Types list.

16 Click the **Save** button to save the information.

Note: The **Save** button is not enabled until there are entries in all required fields.

This user can now use the username, password, and Enterprise code to log in directly to the User Console.

Edit user information

1 On the User Administration window, click on the Users tab. The list view of the Users tab is displayed.

2 Select the user name you wish to edit.

3 Click the **Edit** button. The Details tab is displayed with the entry fields enabled.

4 Change the information in any or all of the entry fields.

Note: You can change a user's password, but you cannot view the user's current password.

5 Click the **Save** button to save the information to the database.

Delete a user

1 On the User Administration window, click on the Users tab. The list view of the Users tab is displayed.

2 Select the name you wish to delete.

3 Click the **Delete** button. A dialog box is displayed to confirm your decision.

4 To proceed, click the **OK** button. The selected user is deleted from the list and the database.

5 Click the **List** button to return to the list view of the Users tab. The user's name is deleted from the list.

Field descriptions

User Administration window

Tab name	Tab description
Administrator tab — list view	A list of the people who are assigned as Administrators is displayed on this tab. The New button is enabled. Select a name to enable edit and delete functions.
Administrator tab — details view	This tab contains the entry fields where you can add or edit information about the administrator.
Users tab – list view	This tab displays the list of assigned users. The New button is enabled. Select a name to enable edit and delete functions.
Details tab	This tab contains the entry fields where you can add or edit administrator and user information.
Scope tab	The Available Departments list displays the departments that can be assigned to a user. The Selected Departments list displays the list of departments assigned to the user.
Permissions tab	All retail.com e-services that your Enterprise subscribes to are listed in the Service column. Access to certain areas of retail.com is assigned to individual users on this tab.

Administrator tab

Field Name	Field Description
Country	The country where the administrator or user is located. If the country is not in the drop-down list, verify that the country is in the list, or make sure that the country is Active. See *Set up countries*.
Email	Required. This address is used with the mail messaging systems throughout retail.com.
Location — details view	The business unit location of the administrator or user.
Name — list view	The full name of the administrator or user.
First Name — details view	Required. The first name of the administrator or user.
Last Name — details view	Required. The last name of the administrator or user.
Password — details view	Required. The password that the administrator or user enters to log in.
Phone	The phone number of the administrator or user.
Type	The user's role in your Enterprise. Options in this drop-down list are created by retail.com.
Username — details view	Required. The username that that the administrator or user enters to log in.

Users tab

Field Name	Field Description
Name	The full name of the user.
Type	The user's role in your Enterprise. Options in this drop-down list are created by retail.com.
Country	The country where the user is located.
Phone	The phone number of the user.
Email	Required. The e-mail address of the user.

Details tab

Field Name	Field Description
Account Manager	When selected, users can collaborate with trading partners. When cleared, your trading partners are unable to view your users in retail.com applications.
Country	The country where the user is located. If the country is not in the drop-down list, verify that the country is in the list, or make sure that the country is Active. See *Set up countries*.
Email	Required. The e-mail address of the user.
First Name	Required. The first name of the user.
Last Name	Required. The last name of the administrator or user.
Location	The business unit location of the administrator or user.
Password	Required. The password that the administrator or user enters to log in.
Phone	The phone number of the user.
Review Only	When selected, grants read-only access to the user, and denies permission to add, edit, and delete data.
Type	The user’s role in your Enterprise. Options in this drop-down list are created by retail.com.
Username	Required. The username that the administrator or user enters to log in.

Scope tab

Field Name	Field Description
Name	The names of all departments that are available to the selected user.
Number	The numeric codes assigned to the departments.

Permissions tab

Field Name	Field Description
Enabled check box	When selected, the selected user has access to the corresponding retail.com e-service. When cleared, the selected user cannot access the service.
Service	The names of available retail.com e-services.

Button descriptions

Administrators tab

Button Name	Button Description
New	Click the **New** button to create a retail.com application account for an administrator. See the *Add an administrator* procedure.
Cancel	Click the **Cancel** button to discard your changes.
close button	To exit the window, click the close button in the upper-right corner.
Save	Click the **Save** button to save additions or changes to an administrator account. The **Save** button is not enabled until there are entries in all required fields.
Delete	Click the **Delete** button to permanently remove the selected administrator account from the retail.com application. See the *Delete an administrator* procedure.
Details	Click the **Details** button to view details about the selected administrator.
Edit	Click the **Edit** button to edit information about the selected administrator. See the *Edit administrator* procedure.
List	Click the **List** button to redisplay the list of administrators.

User and details tab

Button Name	Button Description
New	Click the **New** button to create a retail.com application account for a user. See the *Add a user* procedure.
Cancel	Click the **Cancel** button to discard your changes.
close button	To exit the window, click the close button in the upper right corner.
Save	Click the **Save** button to save additions or changes to a user account. The **Save** button is not enabled until there are entries in all required fields.
Delete	Click the **Delete** button to permanently remove the selected user account from the retail.com application. See the *Delete a user* procedure.
Details	Click the **Details** button to view details about the selected user on the Details tab.
Edit	Click the **Edit** button to edit information about the selected user. See the *Edit user information* procedure.

Button Name	Button Description
List	Click the **List** button to redisplay the list of users on the Users tab.
Move Tracks	Click the **Move Tracks** button to assign track responsibility to another user who is assigned to the same department as the original track owner. See the *Move a track* procedure.

Scope tab

Button Name	Button Description
Left arrow	Disables authorities for this user.
Right arrow	Selects authorities for this user.

Permissions tab

Button Name	Button Description
Left arrow	Disables authorities for this user.
Right arrow	Selects authorities for this user.

Trading Partners

Overview

Business entities collaborate as trading partners. One partner initiates a trading relationship, creates product tracks and purchase orders, and shares this information with the other trading partner.

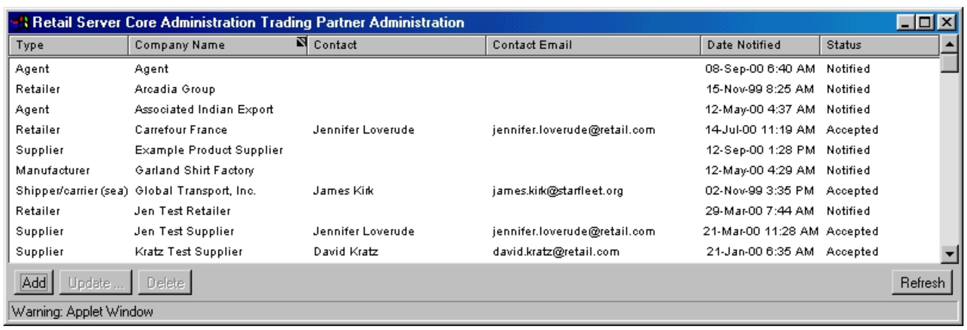
The Trading Partner Administration window allows you to establish and maintain trading partner relationships with other companies within the retail.com network.

Your enterprise can initiate the trading partner relationship, or wait for another enterprise to initiate the relationship.

You can set the scope of the relationship to limit the trading partner to areas of your business that are specifically appropriate for that partner.

To perform the following procedures:

➲ **Navigate:** On the Administration Console, under Application Setup → Locations and Users, click the **Trading Partners** button. The Trading Partner Administration window is displayed.



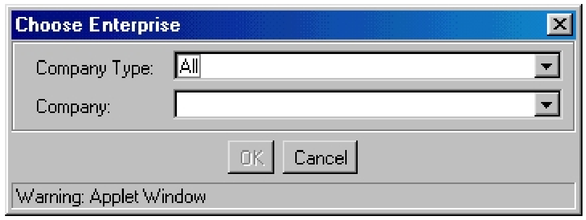
Type	Company Name	Contact	Contact Email	Date Notified	Status
Agent	Agent			08-Sep-00 6:40 AM	Notified
Retailer	Arcadia Group			15-Nov-99 8:25 AM	Notified
Agent	Associated Indian Export			12-May-00 4:37 AM	Notified
Retailer	Carrefour France	Jennifer Loverude	jennifer.loverude@retail.com	14-Jul-00 11:19 AM	Accepted
Supplier	Example Product Supplier			12-Sep-00 1:28 PM	Notified
Manufacturer	Garland Shirt Factory			12-May-00 4:29 AM	Notified
Shipper/carrier (sea)	Global Transport, Inc.	James Kirk	james.kirk@starfleet.org	02-Nov-99 3:35 PM	Accepted
Retailer	Jen Test Retailer			29-Mar-00 7:44 AM	Notified
Supplier	Jen Test Supplier	Jennifer Loverude	jennifer.loverude@retail.com	21-Mar-00 11:28 AM	Accepted
Supplier	Kratz Test Supplier	David Kratz	david.kratz@retail.com	21-Jan-00 6:35 AM	Accepted

Procedures

- Add a trading partner and initiate the relationship
- Accept or decline a relationship initiated by a trading partner
- Update partner information
- Delete a trading partner

Add a trading partner and initiate the relationship

1 On the Trading Partner Administration window, click the **New** button. The Choose Enterprise window is displayed.



2 In the Company Type drop-down list, either:

- Select one Enterprise type

or

- Select All to view all Enterprise types

3 Select the desired company name in the Company drop-down list.

Note: Only company names that have been added to the system will be displayed in the Company drop-down list.

4 Click the **OK** button.

The Retail Server Core Administration system automatically sends an e-mail alert message to the Company Administrator of the trading partner, to indicate that you want to set up a trading partner relationship with them.

On the Trading Partner Administration window, the Status for this partner is set to Notified.

To accept the relationship, the trading partner must log in and accept your trading partner relationship request. Upon acceptance, you immediately receive an e-mail notification. On the Trading Partner Administration window, the status of this trading partner is set to Accepted.

5 Go to the *Update partner information* procedure.

Accept or decline a relationship initiated by a trading partner

You receive an e-mail notification when a trading partner attempts to initiate a trading partner relationship with you.

1 On the Trading Partner Administration window, find the new trading partner's Company Name. The name is italicized and its Status is requested.

2 Double-click the Company Name.

3 Accept or decline the relationship:

- Click the **Yes** button to accept the relationship. On the Trading Partner Administration window, the Status of the trading partner is set to Accepted.

or

- Click the **No** button to decline the relationship. On the Trading Partner Administration window, the Status of the trading partner is set to Declined.

The Retail Server Core Administration system automatically sends an e-mail to inform your trading partner of your decision.

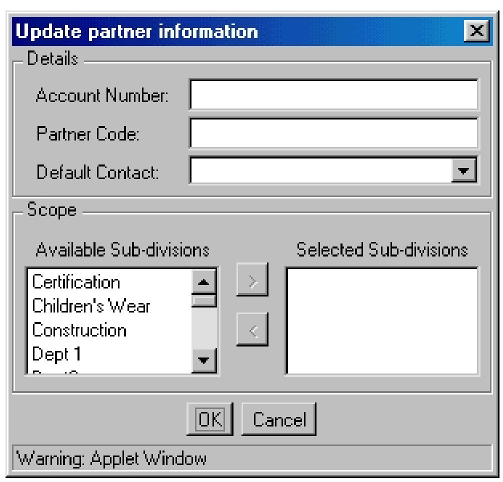
4 Go to the *Update partner information* procedure.

Update partner information

When you establish a trading partner relationship, follow this procedure.

1 On the Trading Partner Administration window, select the Company Name.

2 Click the **Update** button. The Update Partner Information window is displayed.



3 In the Available Departments column, select the departments in your organization to associate with this trading partner.

4 Click the right arrow button to move the selected departments to the Selected Departments column.

5 To remove a selected department, select the department in the Selected Departments column and click the left arrow button.

6 Click the **OK** button.

Delete a trading partner

Caution: If you use the Delete button on the Trading Partner Administration window, this trading partner is permanently deleted. You will never again be allowed to establish a trading partner relationship with this Enterprise on retail.com.

Before you delete a trading partner, decide whether you want the option to re-establish the relationship at a future time.

To delete a trading partner with the option to re-establish a relationship:

1 On the Trading Partner Administration window, double-click the Company Name of the trading partner you want to delete.

2 On the Confirm Cancel window, click the **Yes** button. The Retail Server Core Administration system automatically sends an e-mail to inform your trading partner that you have terminated the trading partner relationship.

To delete a trading partner permanently:

1 On the Trading Partner Administration window, select the Company Name of the trading partner you want to delete.

2 Click the **Delete** button.

3 On the Confirm Delete window, click the **Yes** button. The trading partner is permanently removed from your menus. The Retail Server Core Administration system automatically sends an e-mail to inform your trading partner that you have permanently terminated the trading partner relationship.

Field descriptions

Trading Partner Administration window

Field Name	Field Description
Type	Enterprises set up on retail.com are categorized by type, such as Manufacturer, Supplier, or Agent.
Company Name	The name of the company that you want to set up as a trading partner.
Contact	The name of the designated contact person at the trading partner's company.
Contact Email	The e-mail address of the contact at the trading partner's company.
Date Notified	The date when the trading partner relationship was initiated.
Status	The current state of the trading partner relationship. This can be: • Requested — a trading partner has initiated a relationship with your Enterprise. • Accepted — both you and the trading partner have accepted a relationship. • Declined — you or your trading partner declined a request for a relationship. • Notified — a trading partner was notified that you requested a relationship with them. Acceptance is pending. • Cancelled — you or your trading partner cancelled the relationship.

Choose Enterprise window

Field Name	Field Description
Company Type	Enterprises set up on retail.com are categorized by type. When you select a new trading partner, an entry is required in this field to narrow the search. Select a category, such as Manufacturer, Supplier, or Agent. Select the All option to search for a trading partner through all categories.
Company	The name of the company that you want to approach as a trading partner.

Update Partner Information window

Field Name	Field Description
Account Number	The account number assigned to this trading partner.
Partner Code	The code assigned to this trading partner.
Default Contact drop-down list	The name of the default contact for this trading partner.
Available Departments list	The list of all departments that are available to be selected for this partner.
Selected Departments list	The list of all departments that have been selected for this partner.

Button descriptions

Trading Partner Administration window

Button Name	Button Description
New	To initiate a relationship with a new trading partner, click the **New** button to start the *Add trading partner* procedure.
Set Scope	Click the **Set Scope** button to select the departments that will work with the new trading partner. A minimum of one department is required. See the *Set the scope for the relationship* procedure.
Delete	Use this button to delete the selected trading partner permanently. **Caution:** This is a permanent deletion. You will never again be able to establish a trading partner relationship with the deleted Enterprise. For more information, see the *Delete a trading partner* procedure.
Refresh	Click the **Refresh** button to update the data displayed on the Trading Partner Administration window. Click **Refresh** to verify the addition or deletion of a trading partner.
close button	To exit the window, click the close button at the upper right corner.

Choose Partner Administration window

Button Name	Button Description
OK	Click the **OK** button to initiate a trading partner relationship with the selected company.
Cancel	Click the **Cancel** button to discard changes on the Choose Enterprise window.
close button	To exit the window, click the close button in the upper right corner.

Update Partner Information window

Button Name	Button Description
OK	Click the **OK** button to save the departments you selected to work with the trading partner.
Cancel	Click the **Cancel** button to discard changes on the Set Partner Scope window.
close button	To exit the window, click the close button at the upper right corner.

Chapter 4 – Set up common data

Common data includes:

- Colors
- Seasons
- Terms

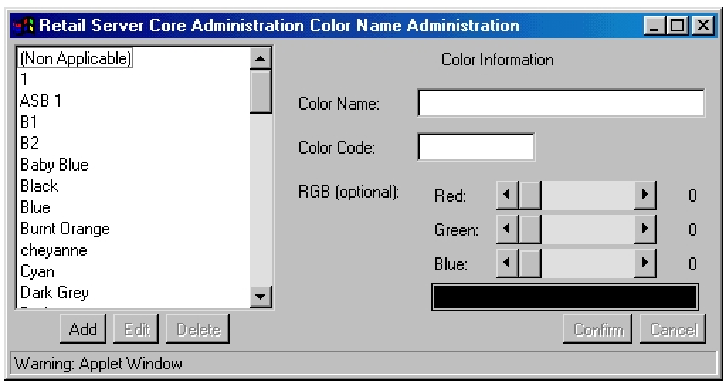
Colors

Overview

On the Color window, you can store standard information regarding product colors. These colors are then available to be assigned to products, when adding products to the system. A separate track can also be created for each product/color combination on an order, when generating tracks.

To perform the following procedures:

➲ **Navigate:** On the Administration Console, under Application Setup → Common Data, click the **Colors** button. The Color Name Administration window is displayed.



Procedures

- Add a color
- Edit a color
- Delete a color

Add a color

1 On the Color Name Administration window, click the **Add** button.

2 In the Color Name field, enter a name for the new product color.

3 In the Color Code field, enter a unique number for the new product color.

4 In the RGB (Optional) field, use the sliders to create the new product color. Click on the right and left arrow buttons for each color (Red, Green, and Blue), or move the sliders until the color that is displayed below matches the new product color you want.

5 Click the **Save** button. The new color is added to the list.

Edit a color

1 On the Color Name Administration window, highlight the name of the color you want to change and click the **Edit** button.

2 Make any changes in the appropriate fields, or using the RGB slider.

3 Click the **Save** button. The changes are saved.

Delete a color

1 On the Color Name Administration window, highlight the name of the color you want to delete and click the **Delete** button.

2 A dialog box is displayed to confirm your decision.

3 To proceed, click **OK**. The color is deleted from the list.

Field descriptions

Field Name	Field Description
Color Name	Contains a color name that corresponds to the product color entered. For example: black, crimson, stonewash blue.
Color Code	Contains a unique number that corresponds to the product color entered. **Note:** the color code number must be unique for each color.
RGB (Optional)	The RGB (Red Green Blue) sliders generate a color according to the selected RGB value. R 255, G 255, B 255 indicates the total saturation of light: white. R 0, G 0, B 0 indicates a total lack of light: black. **Note:** The RGB value is an indicator, and not an exact match or color sample. Most graphic editors use RGB values and can act as a guide.

Button descriptions

Button Name	Button Description
New	Click the **New** button to add a new color to your Enterprise.
Edit	Highlight an existing color and click the **Edit** button to change the color.
Delete	Highlight an existing color and click the **Delete** button to permanently remove that color from the retail.com application.
Help	Click the **Help** button to display Retail Server Core Administration Help about colors.
Save	Click the **Save** button to save new colors or changes to existing colors.
Cancel	Click the **Cancel** button to close an existing or new color without saving changes.

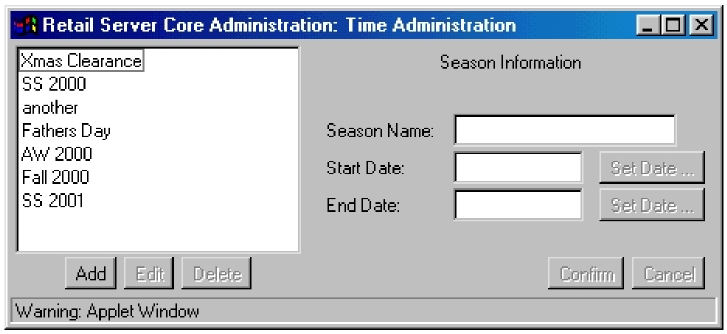
Seasons

Overview

You can define seasons with a start and an end date. You select a season for the track when you create a track. The system assigns the completion date that corresponds with the selected season. When you generate reports, you can sort and filter tracks by season.

In order to perform the following procedures:

➲ **Navigate:** On the Administration Console, under Application Setup → Common Data, click the **Seasons** button. The Time Administration window is displayed.



Procedures

- Add a season
- Edit a season
- Delete a season

Add a season

1 On the Time Administration window, click the **Add** button.

2 In the Season Name field, enter the name of the new season.

3 Click the **Set Date** button to the right of the Start Date field. The Set Date window is displayed.

4 Click the left and right arrow buttons as necessary to select the year in which the new season starts.

5 Click the month in which the new season starts. The calendar of dates for the month is displayed.

6 Click the date on which the new season starts.

7 Click **OK**. The selected start date is displayed in the Start Date field.

8 Click the **Set Date** button to the right of the End Date field. The Set Date window is displayed.

9 Click the left and right arrow buttons as necessary to select the year in which the new season ends.

10 Click the month in which the new season ends. The calendar of dates for the month is displayed.

11 Click the date on which the new season ends.

12 Click **OK**. The selected end date is displayed in the End Date field.

13 Click the **Save** button. The new season is now available.

Edit a season

1 On the Time Administration window, highlight the season you want to edit and click the **Edit** button.

2 Click in the Season Name field and make any necessary changes.

3 Use the **Set Date** buttons to make any necessary changes to the start and end dates.

4 Click the **Save** button. The season has been changed.

Delete a season

1 On the Time Administration window, highlight the season you want to delete and click the **Delete** button.

2 A dialog box is displayed to confirm your decision.

3 To proceed, click **OK**. The season is deleted from the list.

Field descriptions

Field Name	Field Description
Season Name	Contains the name and phase of a season. For example, Autumn/Winter Phase II.
Start Date	Indicates the start date for a season.
End Date	Displays the end date for a season.

Button descriptions

Button Name	Button Description
New	Allows you to add a new season to retail.com applications. See the *Add a season* procedure.
Edit	Lets you change a season. See the *Edit a season* procedure.
Delete	Deletes a season from the list. See the *Delete a season* procedure.
Save	Saves changes or new seasons.
Cancel	Discards any changes made.

Terms

Overview

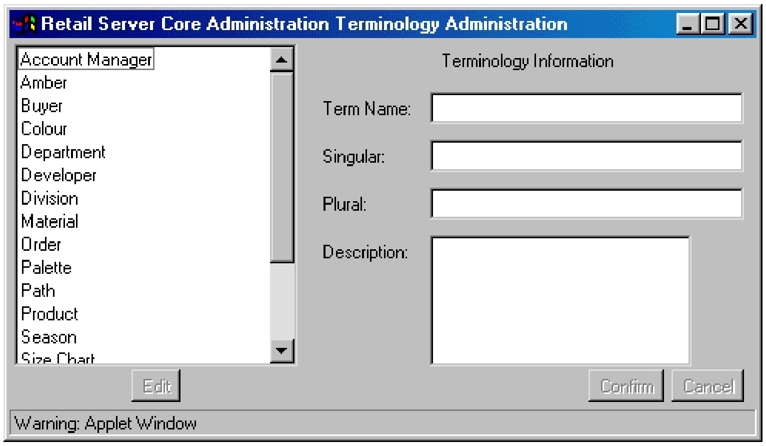
You can customize some descriptive terminology, substituting the terms that are most familiar to your Enterprise for those to which retail.com applications default. The administrator can redefine a term name with both singular and plural definitions, followed by a description of the term and any changes made to it. The following terms can be customized:

- Account Manager
- Buyer
- Color
- Department
- Developer
- Division
- Order
- Palette
- Path
- Product
- Season
- Style
- Supplier
- Technologist
- Trader

Once a term is changed, all references to the original term throughout the product will display your new term.

To perform the following procedures:

➲ **Navigate:** On the Administration Console, under Application Setup → Common Data, click the **Terms** button. The Terminology Administration window is displayed.



Procedure

- Edit a term

Edit a term

1 On the Terminology Administration window, select the term you want to change and click the **Edit** button.

2 If you want to change the singular form of the term, make the change in the Singular field.

3 If you want to change the plural form of the term, make the change in the Plural field.

4 If you want to change the description of the term, make the change in the Description field.

5 Click the **Save** button. The changes are saved.

Field descriptions

Field Name	Field Description
Term Name	The name the Retail Server Core Administration has assigned to a particular variable. Your organization might use a different name for this variable.
Singular	The singular form of the selected term.
Plural	The plural form of the selected term.
Description	The description of the selected term.

Button descriptions

Button Name	Button Description
Edit	Select a term and click the **Edit** button to make changes to the term.
Save	Click the **Save** button to save changes to terms.
Cancel	Click the **Cancel** button to discard changes made to a term.

Appendix A – Set up Web browsers

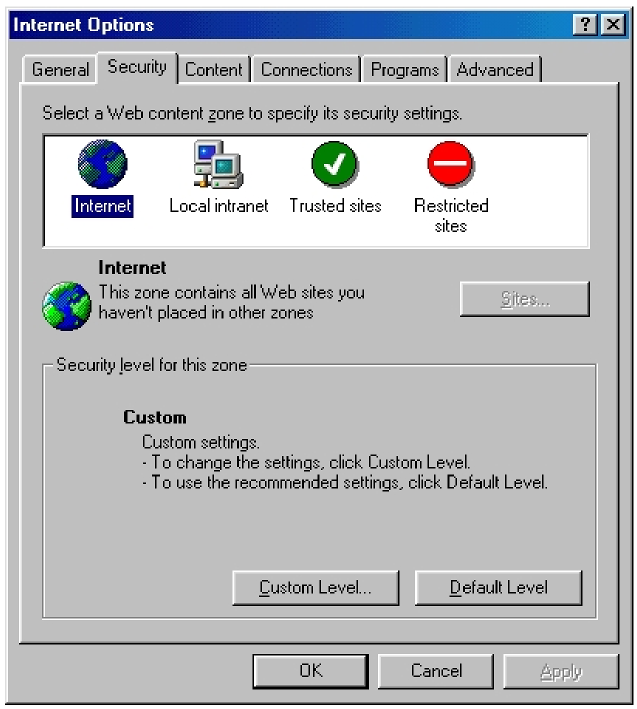
Set up Microsoft Internet Explorer

You must make these changes to enable Retail Server Core Administration to upload files from the local machine to retail.com. Java applets cannot access local files without explicit permission. Set up these security permissions for your browser so that you can upload local digital image files and enable printing. File formats include:

- .gif
- .jpeg
- .jpg

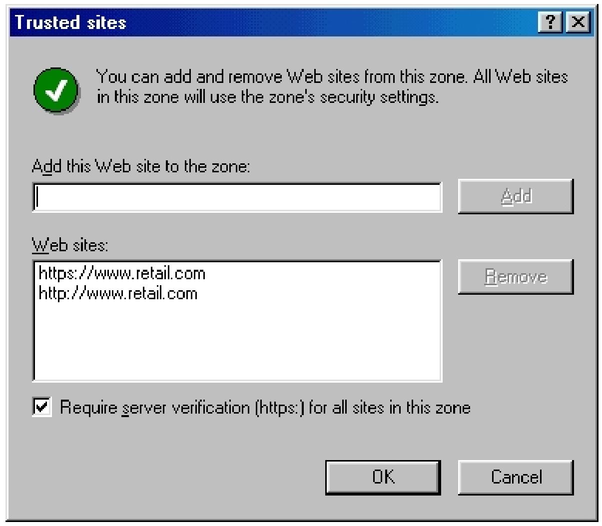
1 From the control panel or the Tools toolbar, select Internet Options. The Internet Options dialog box is displayed.

2 Click on the Security tab.



3 In the Select a Web content zone to specify its security settings area, select the Trusted Sites option.

4 Click **Sites**. The Trusted Sites dialog box is displayed.



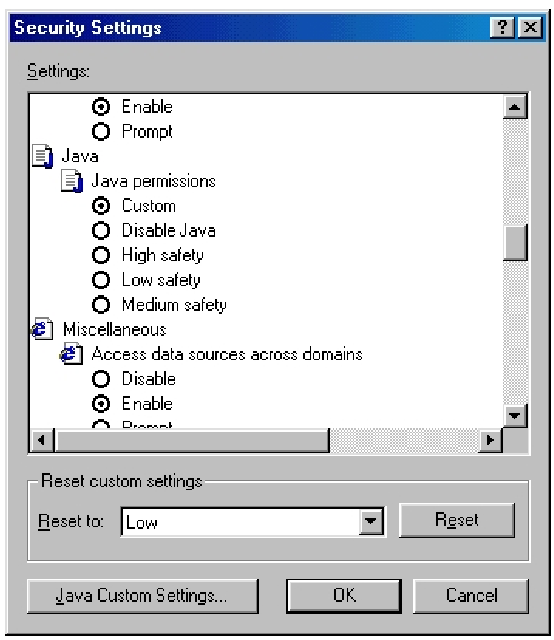
5 In the Add this Web site to the zone field, enter `https://www.retail.com` and click the **Add** button.

6 Clear the Require server verification (https:) for all sites in this zone check box.

7 In the Add this Web site to the zone filed, enter `http://www.retail.com` and click the **Add** button.

8 Click the **OK** button.

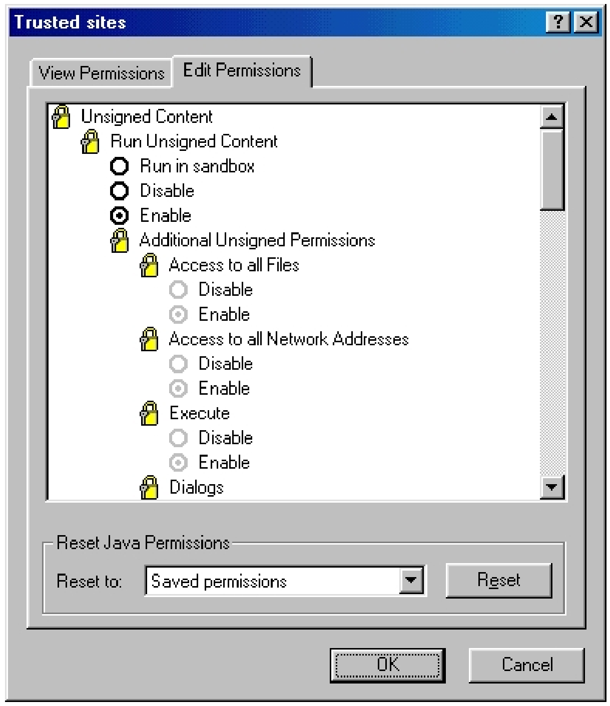
9 At the bottom of the Internet Options dialog box, click the **Custom Level** button. The Security Settings dialog box is displayed.



10 Scroll down to Java. Under Java permissions, select the Custom radio button.

11 Click the **Java Custom Settings** button. The Trusted Sites dialog box is displayed.

12 Click on the Edit Permissions tab.



13 Under Unsigned Content/Run Unsigned Content, select the Enable radio button.*

14 Under Signed Content/Run Signed Content, select the Enable radio button.*

15 Click the **OK** button.

16 On the Security Settings window, click the **OK** button.

17 On the Internet Options window, click the **OK** button.

Printing and file uploads are now enabled from retail.com applications.

*In pre-4.01 releases of Microsoft Internet Explorer, you may not be able to perform steps 11 and 12. Please contact support@retail.com for more information.

Note: Network Administrators should also ensure that no Firewall or Router prevents access to ‘https’ (port: 443).

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