Oracle® Retail Back Office

User Guide

Release 12.0.1

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Oracle Retail Back Office User Guide, Release 12.0.1

Value-Added Reseller (VAR) Language

(i) the software component known as **ACUMATE** developed and licensed by Lucent Technologies Inc. of Murray Hill, New Jersey, to Oracle and imbedded in the Oracle Retail Predictive Application Server - Enterprise Engine, Oracle Retail Category Management, Oracle Retail Item Planning, Oracle Retail Merchandise Financial Planning, Oracle Retail Advanced Inventory Planning and Oracle Retail Demand Forecasting applications.

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Preface

This document describes how to use Oracle Retail Back Office.

Audience

This document is intended for Store Managers and System Administrators who need to manage beginning and end-of-day procedures, employee status, roles, cash, items, pricing, and time management.

Related Documents

For more information, see the following documents in the Oracle Retail Back Office documentation set, Oracle Retail Point-of-Service documentation set, or Oracle Retail Strategic Store Solutions documentation set:

- *Oracle Retail Back Office Release Notes*

- *Oracle Retail Back Office Installation Guide*

- *Oracle Retail Back Office Operations Guide*

- *Oracle Retail Point-of-Service Operations Guide*

- *Oracle Retail Strategic Store Solutions Configuration Guide*

Customer Support

- https://metalink.oracle.com

When contacting Customer Support, please provide:

- Product version and program/module name

- Functional and technical description of the problem (include business impact)

- Detailed step-by-step instructions to recreate

- Exact error message received

- Screen shots of each step you take

Review Patch Documentation

For a base release (".0" release, such as 12.0), Oracle Retail strongly recommends that you read all patch documentation before you begin installation procedures. Patch documentation can contain critical information related to the base release, based on new information and code changes that have been made since the base release.

Oracle Retail Documentation on the Oracle Technology Network

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

http://www.oracle.com/technology/documentation/oracle_retail.html

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

Conventions

The following text conventions are used in this document:

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

1

Overview

Oracle Retail Back Office provides a means of accessing, maintaining, and monitoring store business. The general Oracle Retail Back Office user is a store manager, assistant manager, or system administrator. Occasionally, store employees may have access to time maintenance functions. From one central server, you can access and manage employee status and roles, items, pricing, and store transactions. You can also perform basic store operations such as opening and reconciling tills, adding items, and applying price promotions.

This chapter provides an introduction to Oracle Retail Back Office, including navigational tools, screen region functions, and an overview of the Oracle Retail Back Office features, which enables you to successfully access and manage store operations.

The following topics are discussed:

- Getting Started
- User Interface
- Security and Errors

Getting Started

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

Starting the Application

To access Oracle Retail Back Office, open a browser by double clicking the browser icon on your desktop. To access the login screen, enter the URL for your Oracle Retail Back Office web page into the browser address bar:

http://*<hostname>*:*<portnumber>*/backoffice

Logging In

You must log in to Oracle Retail Back Office before any of the functions can be accessed. Logging in is done from the login screen that appears when Oracle Retail Back Office is launched.

Enter your user ID and password on the Login screen and click **Login**.

For information on how passwords are handled by Oracle Retail Back Office, see Passwords.

Figure 1–1   Login Screen
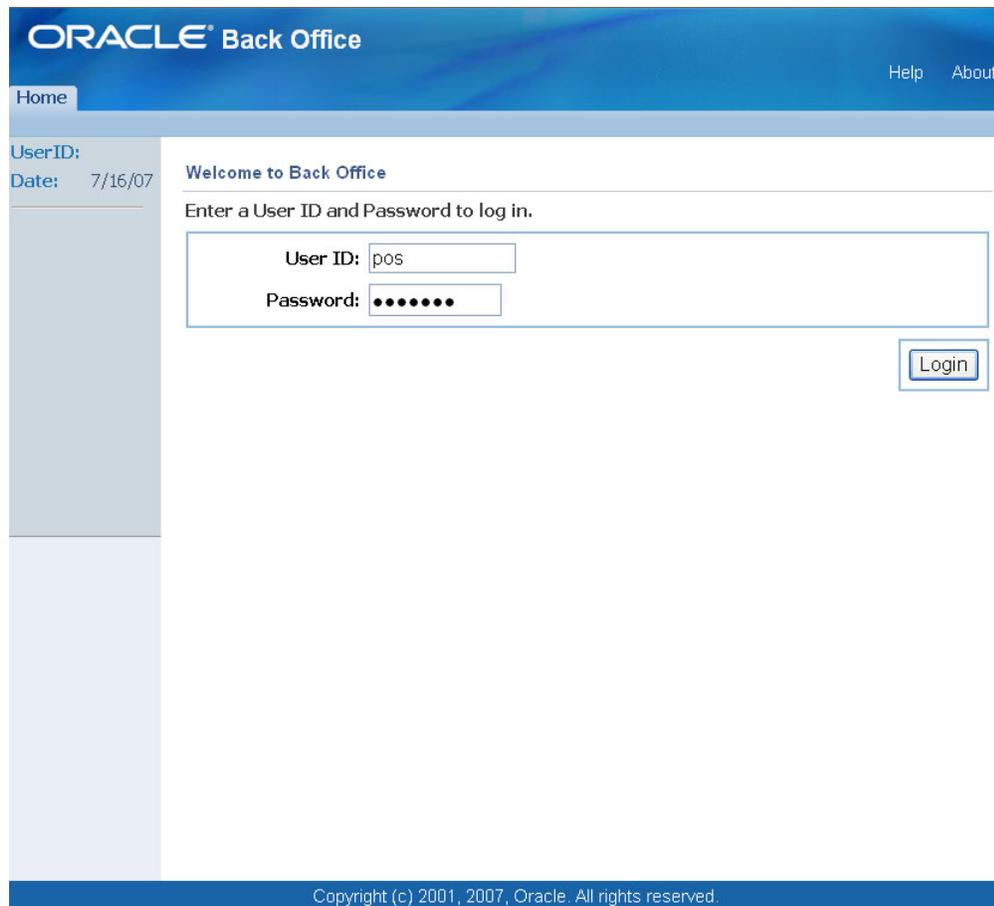
If you entered a temporary password or a password that has expired, the Change Password screen is displayed. See Figure 1–3. You must change your password before you can access the application.

After entering a valid user ID and password, the Dashboard is displayed.

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

Logging Out

You must also log out when you wish to terminate use of the application. Click the **Logout** link in the top right hand corner of the screen. The application logs out the current user and displays the Login screen.

Dashboard

The Dashboard is displayed after logging in or when you click the Home tab. The screen enables you to access the features of Oracle Retail Back Office and to change your password.

Figure 1–2   Dashboard Screen

Change Password

To change your password:

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

Figure 1–3   Change Password Screen

2. Enter your current password.

3. Enter your new password.

4. Enter your new password again to confirm the change.

5. Click **Update**. Your password is changed to the new password.

User Interface

User Interface

This section provides an introduction to the application screen.

Screen Regions

The following figure shows the parts of the application screen.

Figure 1–4   Example Showing Parts of the Application Screen
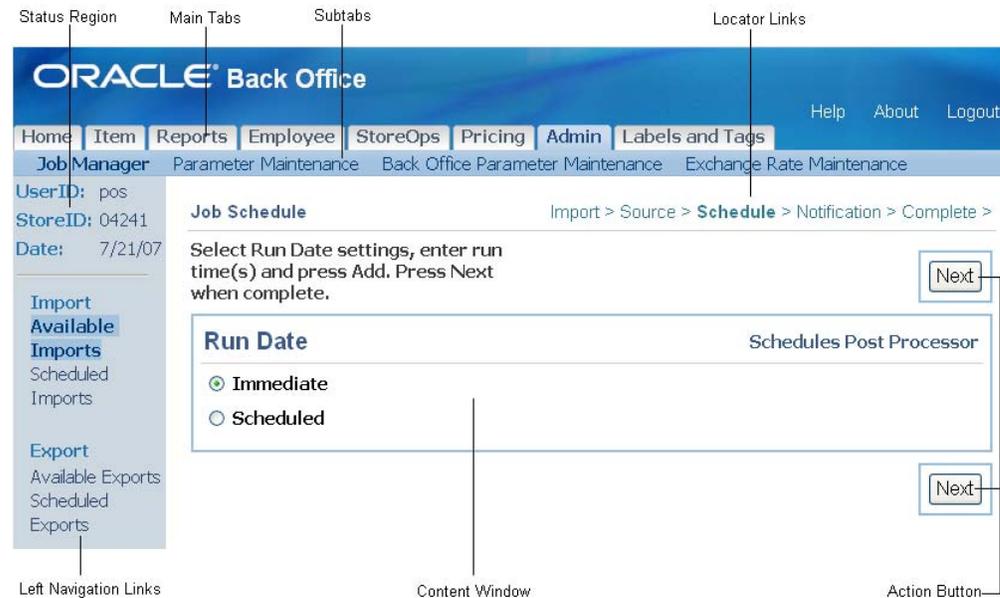
Main Tabs

The main tabs show the main functions of Oracle Retail Back Office.

Subtabs

The subtabs appear below the main tabs when a main tab is clicked. The subtabs that appear correspond to the chosen tab. For example, clicking the **Employee** tab displays employee-related subtabs.

Left Navigation Links

The left navigation links appear or change when a subtab is clicked. The left navigation links enables you to choose a specific function within that subtab. For example, clicking the **Clock In/Out** subtab displays a new screen and the left navigation links specific to that subtab. You can click one of the left navigation links to perform that specific function.

Content Window

You can view or perform tasks in the content window; for example, add employees, create price promotions, or running a report. You can perform these tasks by typing information into a field, choosing an item from a menu, or checking a box. These functions allow for easy updates or changes to information.

Action Buttons and Links

The action buttons and links in the content window aid you in performing tasks in the content window. The action buttons and links, if available, provide you with multiple options for each screen.

Locator Links

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

For example, in Figure 1–4, this screen is the third step of the process to create an import job. You can see that the next step in the process would be to choose the users to be notified of the import job success or failure.

Navigation

Knowing the screen regions and how to access them makes Oracle Retail Back Office easy to navigate. To select a tab, link, or button, click the object. Selecting one of these objects accesses its functionality.

Main Tabs

The main tabs provide the main functions of Oracle Retail Back Office. Table 1–1 lists the tabs and describes the features accessible from each tab.

Table 1–1   Main Tabs

Tab	Functions
Home	The Home tab enables you to view the Dashboard and change your password.
Item	The Item tab enables you to search for and add items and kits.
Reports	The Reports tab enables you to view reports on store sales and financial status. You can also export reports, save reports, print reports, and view report schedules in this feature.
Employee	The Employee tab enables you to search for and add employee roles and temporary employees. You can reset employee passwords. You can also clock employees in and out as well as enter and adjust time entries made at Oracle Retail Point-of-Service or Oracle Retail Back Office and enter special hours. You can view employee time reports.
StoreOps	The StoreOps tab enables you to open and close the store, open and close registers, open and reconcile tills, and create a bank deposit. You can also access store, register, and till reports.
Pricing	The Pricing tab enables you to search, create, and add price promotions, price changes, and discount rules.
Admin	The Admin tab enables maintenance of store and Oracle Retail Back Office parameters, as well as provides available imports and exports for the job manager. You can also set and maintain foreign currency exchange rates.
Labels and Tags	The Labels and Tags tab enables you to access the Oracle Retail Labels and Tags product. This tab is only available if the Oracle Retail Labels and Tags product has been purchased and installed. For more information on using this product, see the Oracle Retail Labels and Tags User Guide.

Help

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

About

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

Locale Support

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

> **Note:** Reports do not use the application default locale but are displayed in the English - United States locale. Dates are displayed in MM/DD/YYYY format. Time is displayed in HH:MM format.

Security and Errors

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

Passwords

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

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

For information on changing your password, see Change Password.

User Messages

A message is displayed to notify you of an error or task completion. Common error messages include not entering specified fields or an incorrect user ID or password. You must correct the specified error before continuing.

Timeout Interval

If you attempt to perform a task after several minutes of inactivity, the screen defers back to the login screen for security purposes. The default screen timeout interval is five minutes, but this time is configurable during installation. If the screen returns to the login screen, enter your user ID and password. The Dashboard or the last screen viewed is displayed.

2

Item Maintenance

Item Maintenance provides the functionality to maintain the store database of items and kits that are available in the store. A kit is a collection of items grouped under one price. You can search for and modify existing items or kits as well as add items or kits to the database. You can also add or modify the items included in a kit.

> **Note:** If item information is being downloaded through Oracle Retail Merchandising System, any changes made through the Back Office Item tab will be overridden the next time item information is downloaded.

The following topics are discussed:

- Searching for an Item or Kit
- Managing Items
- Managing Kits

Searching for an Item or Kit

On the Item Search screen, you can search for items or kits by item number or description and optionally select to add a new item or kit to the database if it is not found. To avoid duplication, a search must be made before you can add an item or kit to the database.

To search for an item:

1. Click the **Item** tab.

2. Click the **Search** subtab. The Item Search screen is displayed.

Figure 2–1   Item Search Screen

Item Search

Enter Item Number or Description, select a Search Type, and select Search.

Item Number:

Description:

Search Type :   Item
                Kit

[Search]   [Clear Search]

3. Enter an item number or description. If the exact description is unknown, you can search by entering part of the description with a wild card (*). For example, you can search for "computer*" to yield any items or kits with "computer" in the name.

4. Select a search type from the menu. The search type is either item or kit. You can search for both an item and kit by multisecting both words in the menu.

5. Click **Search**. Depending on the result, do one of the following:

   - If a matching item description is not found, enter new criteria and retry the search.

   - If an item or kit number is not found, the Item Not Found screen is displayed. You can add the item or item or retry the search. To add the item or kit to the database, click **Yes**. To return to the search screen, click **No**.

   - If a matching item or kit is found, the Item Maintenance or Kit Maintenance screen is displayed. See Managing Items or Managing Kits.

   - If multiple kits or items are found, a search results screen is displayed. See Selecting an Item or Kit.

Selecting an Item or Kit

On the Search Results screen, you select an item or kit and view or modify details about it.

Figure 2–2   Search Results Screen

Table 2–1 describes the information on this screen.

Table 2–1   Search Results Columns

Column	Description
Item Number	Unique identifying number or SKU number used to identify the item or kit
Point of Sale Identity	Unique item or kit SKU number referenced by Oracle Retail Point-of-Service
Classification	Classes used for reporting and assignment of discount rules or items
Description	Description of the item or kit
Regular Price	Regular or permanent price assigned to the item or kit

Click the item or kit number to view its details. See Managing Items or Managing Kits.

Managing Items

On the Item Maintenance screen, you can add a new item or modify an existing item.

> **Note:** If you are not allowed to edit items, the Item Maintenance screen is displayed as read only.

Figure 2–3   Item Maintenance Screen

Table 2–2 describes the information on this screen.

Table 2–2   Item Maintenance Fields

Input Field	Description
Item Number	SKU number assigned to the item.
Description	Short description of the item.
Long Description	Long description of the item. This description is displayed in Oracle Retail Point-of-Service.
Department	Department where the item is defined, generally used for reporting.
Item Type	Whether the item is a stock item or a service item, delivery for example.
Unit of Measure	How the item is measured, pounds or liters for example.
Style	Style of the item, generally used for apparel.
Color	Color of the item, generally used for apparel.
Size	Size of the item, generally used for apparel.
Regular Price	Regular or permanent price of the item.
Selling Price	Price currently displayed in Oracle Retail Point-of-Service.
Cost	Cost of the item. Used for reporting.
Taxable	If the item is taxable, click **Yes**. If the item is not taxable, click **No**.
Tax Group	Group that determines how tax is calculated.
Planogram ID	Identifier of where the item is located in the store.
Merchandise Hierarchy Group	Group in the merchandise hierarchy where the item is defined. This is used for reporting.
Minimum Age for Purchase	The minimum age required in order to purchase the item.
Labels/Tags Template Type	The template type assigned to the item for printing with Oracle Retail Labels and Tags.
Available Classes and Assigned Classes	Classes used for reporting and assignment of discount rules or items. Up to nine classes can be selected.
Features	Feature that control how the item is used in Oracle Retail Point-of-Service. For a description of each feature, see Table 2–3.

To modify or add an item:

1. Enter or update the item information.

    - Enter the item description and cost. Description, Long Description, and Cost are required fields and may not be left blank.

    - Select options from the available menus.

    - Click **Yes** or **No** for each provided item feature. An administrator can customize these features. The available features are shown in Table 2–3.

Table 2–3   Item Maintenance Features

Feature Name	Description
Discountable	When set to No, the markdown and discount buttons are not be available
Serialized	When set to Yes, you are prompted to enter the item's serial number
Restocking Fee	When set to Yes, and the item is returned, a percentage of the item price is included as a fee
Price Modifiable	When set to No, the Price Override button is not available
Quantity Modifiable	When set to No, the Quantity button is not available. This is set to No on all gift cards.
Activation Required	When set to Yes, a message appears at the end of a transaction when a gift card is sold to state it should later be used as tender
Authorized for Sale	When set to No, the item is not allowed to be sold at Point-of-Service
Price Entry Required	When set to Yes, you are prompted to enter a price for the item
Registry Eligible	When set to No, the Item Registry button is not available
Special Order Eligible	When set to No, the Special Order button is not available
Employee Discount Eligible	When set to No, the item may not have an employee discount applied
Damage Discount Eligible	When set to No, the item may not have a damage discount applied

2. Select one or more classes from the Available Classes menu.

    To add the classes to the Assigned Classes, click **Add**. To remove items from the Assigned Classes, click the class name, and click **Remove**.

    > **Note:**   No more than nine classes can be assigned to an item.

3. To save the updated information, click **Save**. The Item Search screen is displayed. See Figure 2–1.

Managing Kits

A kit is a set of items grouped under one promotional price. On the Kit Maintenance screen, you can modify existing kits or define a new kit.

> **Note:** If you are not allowed to edit kits, the Kit Maintenance screen is displayed as read only.

Figure 2–4   Kit Maintenance Screen

Table 2–1 describes the information on this screen.

Table 2–4   Kit Maintenance Fields and Columns

Data Field or Column	Description
Kit Item Number	SKU number assigned to the kit.
Kit Description	Description of the kit displayed in Oracle Retail Point-of-Service.
Department	Department where the kit is defined, generally used for reporting.
Select to Remove	A checked box means the item is selected to be removed from the kit.
Item Number	SKU number assigned to the item.
Description	Short description of the item.
Quantity	The number of this item that is included in the kit.

To modify or add a kit:

1. Enter or modify kit information.

    ■   To set the kit description, enter a new description into the field.

    ■   To set the department, select a new department from the menu.

    ■   To set the quantity of items, delete the number in the Quantity box and enter a new number.

    ■   To remove an item, check the box next to the item number, and click **Remove**.

2. To save the kit information, click **Save**. The Item Search screen is displayed.

Adding Items to a Kit

On the Kit Component Maintenance screen, you can add items to an existing or new kit. The items must exist before they can be added to a kit.

To add items to a kit:

1. Run a kit search using steps 1-5 in Searching for an Item or Kit. Choose to modify an existing kit or add a new kit to the database. The Kit Maintenance screen is displayed. See Figure 2–3.

2. Click **Add Item**. The Kit Component Maintenance screen is displayed.

Figure 2–5   Kit Component Maintenance Screen

3. Enter the item number in the given field.

4. Enter the quantity in the component Quantity field.

5. To add the item, click **Add**. The Kit Maintenance screen is displayed. The new item appears at the bottom of the screen.

3

Store Operations

Store Operations provides communication and activity between Oracle Retail Back Office and Point-of-Service and enables you to perform daily functions associated with store opening and closing and register and till maintenance. The operations performed in Back Office affect the status of the store as well as the registers and tills at Point-of-Service. For more information on daily operations at Point-of-Service, see the Oracle Retail Point-of-Service User Guide.

The following topics are discussed in this chapter:

- Opening the Store
- Closing the Store
- Bank Deposits

Some of the functions performed during opening and closing stores is determined by the values assigned to parameters and system settings. For information on setting parameters, see Parameter Maintenance in Chapter 7. For information on the available parameters and system settings, see the Oracle Retail Strategic Store Solutions Configuration Guide.

Opening the Store

Opening the store includes defining the business date, setting the opening cash fund for the day, opening registers, and opening tills. The store must be open in order for the store employees to perform transactions.

> **Note:** Registers and tills may be opened at any point during the day.

Starting the Business Day

The Start of Day function must be performed before registers and tills can be opened.

To run Start of Day:

1. Click the **StoreOps** tab.
2. Click the **Store** subtab.
3. Click the **Start of Day** left navigation link.

> **Note:** If the store is already open, you are not allowed to run the start of day operation.

4. Enter the new business date and click **Next**. The Operating Fund Count screen is displayed. See Counting Operating Funds. Once the system accepts the amount, the store is successfully opened and you can continue with other store operations.

Counting Operating Funds

On the Operating Fund Count screen, you enter the amount of the store operating fund for the start or end of the business day. To enter the count:

1. Enter the cash amount of the store operating fund.

   ■ To enter the amount for the start of the business day:

      – If the Count Operating Funds at Start of Day parameter is set to No, you are not asked to enter an amount.

      – If the Count Operating Funds at Start of Day parameter is set to Summary, enter an amount.

      – If the Count Operating Funds at Start of Day parameter is set to Detail, enter an amount for each type of currency and click **Refresh Total**.

   ■ To enter the amount for the end of the business day:

      – If the Count Operating Funds at End of Day parameter is set to No, you are not asked to enter an amount.

      – If the Count Operating Funds at End of Day parameter is set to Summary, enter an amount.

      – If the Count Operating Funds at End of Day parameter is set to Detail, enter an amount for each type of currency and click **Refresh Total**.

2. Click **Next**.

   ■ If the cash amount is not what the system expects, a Count Error Notice is displayed. To accept the amount, click **Yes**. To enter the count again, click **No**.

   ■ Otherwise, opening or closing the store can continue.

Opening Registers

A register must be opened before a till can be assigned to it. Registers can be opened at any time during the day.

To open registers:

1. Click the **StoreOps** tab.

2. Click the **Register** subtab.

3. Click the **Open Registers** left navigation link. The Register Open screen is displayed. For each register, the register number and current status of the register are displayed.

Figure 3–1   Register Open Screen

4. Select the registers to open by checking the boxes next to each register number or click **Select All** to select all the registers. To view more registers, click a page number link at the bottom of the screen.

5. To open the selected registers, click **Open**. The register status changes to Open.

Opening Tills

A register must be open before the till can be opened. Tills can be opened in Oracle Retail Back Office or Point-of-Service.

To open a till in Oracle Retail Back Office:

1. Click the **StoreOps** tab.

2. Click the **Till** subtab.

3. Click the **Open Till** left navigation link. The Till Open Screen is displayed.

Figure 3–2   Till Open Screen

4. Enter the register ID, till ID, and operator ID for the till to be opened.

5. Click **Next**. Depending on the Count Float at Open parameter, a currency count may be required.

   ■ If the setting is No, you are not asked for a currency count.

   ■ If the setting is Summary, the Summary Float Count screen is displayed. Enter the float amount and click **Next**.

   ■ If the setting is Detail, the Detail Currency Count screen is displayed. Enter the amount for each currency and click **Next**. For more information, see Setting the Detail Currency Count.

6. If the count was done and the amount is not what the system expects, a Count Error Message is displayed. To accept the amount, click **Yes**. To re-enter the amount, click **No**.

7. The Till Function Successful screen is displayed. Click **Enter**. The till is opened.

Closing the Store

The store should be closed at the end of every workday. Store financials are closed for the day and are then reset when the store is next opened. To close the store, all registers must be closed and all tills reconciled.

At the completion of reconciling tills, closing registers, and end of day processing, reports are displayed that document the counts made at each of those points. The reports can be printed or exported. For more information on printing and exporting reports, see Chapter 4.

Reconciling Tills

Reconciling a till means counting the funds in a specific till and comparing the count with the expected amount. A till can be reconciled at any time during the day. By default, a till can only be reconciled in Oracle Retail Back Office. Tills must be closed in Oracle Retail Point-of-Service before they can be reconciled. Refer to the Oracle Retail Point-of-Service User Guide for information on closing tills.

To reconcile a till:

1. Click the **StoreOps** tab.

2. Click the **Till** subtab.

3. Click the **Reconcile Till** left navigation link. The Till Reconcile Information screen is displayed.

Figure 3–3   Till Reconcile Information Screen

4. Enter the register ID and till ID in the given fields.

> **Note:**   You are prompted if the till is not yet closed or if the till has already been reconciled.

5. Click **Next**. Depending on the setting for the Count Float at Reconcile parameter, do one of the following:

   - If the setting is No, you are not asked for a currency count.

   - If the setting is Summary, the Summary Float Count screen is displayed. Enter the float amount and click **Next**.

   - If the setting is Detail, the Detail Currency Count screen is displayed. Enter the amount for each currency and click **Next**. See Setting the Detail Currency Count.

6. If the count was done and the amount is not what the system expects, a Count Error Notice message is displayed. To accept the amount, click **Yes**. To re-enter the amount, click **No**.

7. Click **Next**. Depending on the setting for the Count Till at Reconcile parameter, do one of the following:

   - If the setting is No, you are not asked for a currency count.

   - If the setting is Summary, the Count Reconcile Summary screen is displayed.

   - If the setting is Detail, the Count Reconcile Detail screen is displayed.

   For more information on these screens, see Setting the Detail Till Count.

8. If the count was done and the amount is not what the system expects, a Count Error Notice message is displayed. To accept the amount, click **Yes**. To re-enter the amount, click **No**.

9. If the system is configured for foreign currency, the Foreign Currency Count screen is displayed. See Setting the Foreign Currency Count.

10. If the system accepts the till count, the Till Reconcile Successful message is displayed. A transaction number is assigned to the till reconcile and the till data is saved.

11. Reports are displayed that can be printed or exported:

    a. For the reports dependent on the Count Float at Reconcile and Count Till at Reconcile parameters, see Till Reports.

    b. The Till Summary Report is also displayed. For an example, see Figure 3–10.

Setting the Summary Float Count

The Summary Float Count screen is used to enter the float amount under the following conditions:

- When a till is being opened and the Count Float at Open parameter is set to Summary.

- When a till is being reconciled and the Count Float At Reconcile parameter is set to Summary.

You enter the float amount and click **Next**.

Setting the Foreign Currency Count

If the system is configured to accept foreign currency, the Foreign Currency Count screen is used to enter a count of foreign currency during a bank deposit or till reconcile.

Figure 3–4   Foreign Currency Count

To set the foreign currency count:

1. Click the link for the foreign currency to be counted.

2. The Count Reconcile Detail screen for the selected currency is displayed. See Setting the Detail Till Count.

3. When you are done counting foreign currency, click **Next**.

Setting the Summary Till Count

The Count Reconcile Summary screen is used to enter the count for each tender when the Count Till at Reconcile parameter is set to Summary.

Figure 3–5   Count Reconcile Summary Screen

Enter an amount for each type of tender. To see an updated total, click **Refresh Total**. When you have finished entering amounts, click **Next**.

Setting the Detail Till Count

The Count Reconcile Detail screen is used to enter a detailed count for each tender when the Count Till at Reconcile parameter is set to Detail.

Figure 3–6   Count Reconcile Detail Screen

To count a tender, click the link for the tender. If cash is selected, the Detail Currency Count screen is displayed. See Setting the Detail Currency Count. For any other type of tender, a detail screen is displayed. See Setting the Tender Detail. When you have entered all the counts, click **Next**.

Closing Registers

Closing a register means setting that register status to Closed when the register is not in use. All tills at a register must be reconciled before that register can be closed. Registers must be closed one at a time.

To close registers:

1. Click the **StoreOps** tab.

2. Click the **Register** subtab.

3. Click the **Close Registers** left navigation link. The Register Close screen is displayed.

Figure 3–7   Register Close Screen

> **Note:**   If all registers are closed, the Register Close screen displays Results 0-0 of 0.

4. To close the register, click the register number link. The Register Status screen is displayed. See Checking the Register Status.

Checking the Register Status

The Register Status screen shows the list of registers selected to be closed and the status of each register.

Figure 3–8   Register Status Screen

To print this Register Summary report, click **Print**. To close another register, click **Close More**.

End of Day

The End of Day function closes the store for the day and sets the store's financial status for the current business date. After End of Day is run, no more financial transactions can be performed for that business date. All registers must be closed before you can run the End of Day function and close the store. If one or more registers are open, a message prompts you to close all registers before End of Day can run successfully.

To run End of Day:

1. Click the **StoreOps** tab.

2. Click the **Store** subtab.

3. Click the **End of Day** left navigation link.

4. If suspended transactions exist, you can cancel or complete those transactions. The Suspended Transaction report is displayed. See Suspended Transactions Report.

5. The Operating Fund Count screen is displayed. See Counting Operating Funds.

6. The system displays the Store financial totals summary collected from Oracle Retail Point-of-Service. The summary includes amounts for starting float, ending float, till loans, and till pickups.

7. To accept the end of day summary, click **Next**. The store is successfully closed.

8. To view the Store Summary report, click **Enter**. For an example, see Figure 3–10. The report can be printed or exported. To return to the Start of Day screen, click **Done**.

Suspended Transactions Report

This report is displayed when end of day processing is performed for a store and suspended transactions exist. All transactions that are currently suspended are included in the report.

Figure 3–9   Suspended Transactions Report

Display Report

Select to Print or Export the report. Select Done to continue.

[Print] [Export] [Done]

Suspended Transactions Report

08/02/2007   08:04 AM
Store: 04241

Transaction #	Register	Till	Cashier	Reason Code	Total
1302	129	137	20027	OperatorRequest	899.95
1293	129	135	20027	CustomerRequest	390.99
1291	129	135	20027	OperatorRequest	7.50

[Print] [Export] [Done]

Table 3–1 describes the columns in the report.

Table 3–1   Suspended Transactions Report Columns

Column	Description
Transaction #	The identifier of the suspended transaction.
Register	The register number at which the transaction was suspended.
Till	The identifier of the till in the register at the time.
Cashier	The employee number of the cashier who suspended the transaction.
Reason Code	The reason why the transaction was suspended.
Total	The total amount of the transaction.

Reports

The following type of reports are available when closing the store:

- Summary Reports
- Till Reports
- Suspended Transactions Report

Reports can be printed or exported. For information on printing and exporting reports, see Chapter 4.

Note: Reports are not displayed in the default locale for the application. Dates are displayed in MM/DD/YYYY format. Time is displayed in HH:MM format.

Summary Reports

The summary report that is displayed is dependent on the processing that was completed:

- At the completion of reconciling a till, the Till Summary Report is displayed.
- At the completion of closing a register, the Register Summary Report is displayed. This report only includes till information for transactions rung up on the register.
- At the completion of end of day processing, the Store Summary Report is displayed. This report shows summary information for the store at the end of day.

Information presented in a summary report is categorized into the following sections. These sections are the same for all summary reports.

- The Tender Summary section shows information on the tenders used during the business day. The summary shows the expected amounts taken in and out for each tender, the actual amount counted at reconciliation, and any count that is over or under the expected amount.
- The Transaction Summary section shows information for all transactions for the business day. A count and amount for each type of transaction is shown.
- The House Account Enrollment Summary section shows information on applications for house accounts. A count of the approved applications and declined applications is shown.
- The Statistical Summary section shows additional information including discounts and fees charged during the business day. For each entry, a count and amount is shown.
- The Count Summary section shows a count of the price changes and cancelled transactions.
- The Tax Summary section shows information on taxable and non-taxable sales. The total amount of sales tax for each tax jurisdiction and the total amount for all jurisdictions is shown.

The following should be noted concerning the information in the reports:

- The financial information presents the tenders that were actually taken in and out during the business day.
- The financial information on web orders that have been tendered (completed) is included in the Till Summary Report.

- Taxable transactions with non-taxable items are included in the Net Transaction Taxable line of the Transaction Summary section. Items with tax overridden to zero are considered non-taxable items.

Table 3–2 describes the columns in summary reports.

Table 3–2   Summary Report Columns

Column	Description
Tender Summary	Type of tender counted.
In	Amount of that tender when the register was opened.
Out	Amount of the tender expected when the register was closed.
Net	The In amount minus the Out amount.
Counted	Amount of that tender as counted by the cashier.
Over/Short	The Net amount minus the Counted amount. If the count is over the expected amount, a plus sign (+) is displayed next to the value. If the count is under, the amount is enclosed in parentheses.
Transaction Summary	Type of transaction counted.
House Account Enrollment Summary	The number of house account applications approved and declined.
Statistical Summary	Type of item, discount, or fee counted.
Count Summary	The number of price changes, cancelled transactions, no sale transactions, and post voids.
Tax Summary	Amount of taxable and non-taxable sales.
Count	The number of times the transaction or price change occurred.
Amount	The total amount for the transaction, item, discount, or fee.

The next two figures show an example of a summary report. The Register Summary Report is used as the example.

Figure 3–10   Register Summary Report - First Part

Display Report

Select to Print or Export the report. Select Done to continue.

[Print] [Export] [Done]

Summary Report
Store 04241/Register #129

07/24/2007   12:20:55 PM
Cashier: pos
Starting Date: 07/15/2007

Till Summary for #: 101	
Open Float	200.00
Closing Float	220.00
Over/Short	20.00

Tender Summary	In	Out	Net	Counted	Over/Short
Cash	120.00	2.25	117.75	117.75	0.00
e-Check	27.50	0.00	27.50	27.50	0.00
Deposited Check	0.00	0.00	0.00	0	0.00
Mail Bank Check	N/A	0.00	0.00	N/A	N/A
Visa	0.00	0.00	0.00	0	0.00
MasterCard	0.00	0.00	0.00	0	0.00
AMEX	0.00	0.00	0.00	0	0.00
Discover	0.00	0.00	0.00	0	0.00
Diners	0.00	0.00	0.00	0	0.00
JCB	0.00	0.00	0.00	0	0.00
House Card	0.00	0.00	0.00	0	0.00
Debit	0.00	0.00	0.00	0	0.00
Gift Card	0.00	0.00	0.00	0	0.00
Gift Certificate	0.00	0.00	0.00	0	0.00
Travelers Checks	60.00	0.00	60.00	60.00	0.00
Non-Store Coupon	0.00	0.00	0.00	0	0.00
Store Credit	0.00	0.00	0.00	0	0.00
Mall Gift Certificate	0.00	0.00	0.00	0	0.00
PO Tender	0.00	0.00	0.00	0	0.00
Money Order	40.00	0.00	40.00	40.00	0.00
Totals	**247.50**	**2.25**	**245.25**	**245.25**	**0.00**

Transaction Summary	Amount
Net Transaction Taxable	147.50
Net Transaction Non-Taxable	0.00
Till Pickup	0.00
Till Pickup (CAD)	0.00
Till Loan	0.00
Till Pay In	0.00
Till Pay Out	0.00
House Account Payment	0.00

Figure 3–11   Register Summary Report - Second Part

Layaway New	0.00
Layaway Pickup	0.00
Layaway Payment	0.00
Layaway Delete	0.00
Special Order New	97.75
Special Order Complete	0.00
Special Order Cancel	0.00
Special Order Partial	0.00

House Account Enrollment Summary

House Account Applications	Count
Approved	0
Declined	0

Statistical Summary	Amount
Gift Cards Issued	0.00
Gift Cards Reloaded	0.00
Gift Cards Credit	0.00
Gift Cards Redeemed	0.00
Gift Certs. Issued	0.00
Gift Certs. Redeemed	0.00
Store Credits Issued	0.00
Store Credits Redeemed	0.00
Item Employee Disc.	0.00
Trans. Employee Disc.	0.00
Transaction Discount	0.00
Item Discount	0.00
Item Markdown	0.00
Post Void Transaction	0.00
Non-Merchandise	0.00
Line Item Delete	0.00
Layaway Fee	0.00
Layaway Delete Fee	0.00
Restocking Fee	0.00
Shipping Charges	0.00

Count Summary	Count
Price Overrides	0
Price Adjustments	0
Cancelled Trans.	1
No Sales	1
Post Voids	0

Tax Summary	Amount
Sales Taxable	147.50
Sales Nontaxable	0.00
Total SalesTax	0.00

End of Report

Print Export Done

Value Added Tax

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

When VAT is enabled, there is no sales tax. Sales tax is not shown in the Transaction Summary section. In the Tax Summary section, a summary of the VAT is shown instead of sales tax. The following figure shows an example.

Figure 3–12   Tax Summary Section with VAT Enabled

Tax Summary	Amount
Sales Taxable	147.50
Sales Nontaxable	0.00
Tax Authority	
VAT A	50.00
Total VAT	**50.00**

Till Reports

The till reports display financial information about a till at till reconcile. The Count Till at Reconcile and Count Float at Reconcile parameters determine which reports are displayed. For more information on the parameters, see the Oracle Retail Strategic Store Solutions Configuration Guide.

Summary reports show counts and totals for each denomination. Detail reports show the count and total for each type of tender defined for a denomination. For example, a summary report shows totals for all credit cards. A detail report shows the count and amount for each type of credit card.

- When Count Till at Reconcile is set to Summary, the Till Count Summary Report is displayed.

- When Count Till at Reconcile is set to Detail, the Till Count Detail Report is displayed.

- When Count Float at Reconcile is set to Summary, the Till Float Summary Report is displayed.

- When Count Float at Reconcile is set to Detail, the Till Float Detail Report is displayed.

- If the parameter is set to No, the report is not displayed.

The following figures show examples of a Till Float Detail Report and a Till Count Detail Report. The summary versions of each these reports show only the totals for each denomination.

Figure 3–13   Till Float Detail Report

Display Report

Select to Print or Export the report. Select Done to continue.   [Print] [Export] [Done]

Reconcile Till Float Count Report
Store 04241/Register #129

08/04/2007   11:02 AM
Cashier: pos

Till ID: 110

Denomination	Cash Count	Amount
Pennies	50	0.50
Nickels	10	0.50
Dimes	15	1.50
Quarters	10	2.50
Half-Dollars	0	0.00
$1 Coins	0	0.00
$1 Bills	20	20.00
$2 Bills	0	0.00
$5 Bills	5	25.00
$10 Bills	3	30.00
$20 Bills	1	20.00
$50 Bills	0	0.00
$100 Bills	0	0.00
Totals		100.00

[Print] [Export] [Done]

Figure 3–14   Till Count Detail Report - First Part

Display Report

Select to Print or Export the report. Select Done to continue.   Print   Export   Done

Reconcile Till Count Report
Store 04241/Register #129

08/04/2007   11:10 AM
Cashier: pos

Till ID: 110

Denomination	Cash Count	Amount
Pennies	50	0.50
Nickels	10	0.50
Dimes	15	1.50
Quarters	10	2.50
Half-Dollars	0	0.00
$1 Coins	0	0.00
$1 Bills	20	20.00
$2 Bills	0	0.00
$5 Bills	5	25.00
$10 Bills	3	30.00
$20 Bills	1	20.00
$50 Bills	0	0.00
$100 Bills	0	0.00
Totals		100.00

Denomination	Deposited Check Count	Amount
Totals	1	423.25

Denomination	E-Check Count	Amount
Totals	0	0.00

Denomination	Credit Count	Amount
Visa	0	0.00
MasterCard	0	0.00
American Express	0	0.00
Discover	0	0.00
Diners	0	0.00
House Card	0	0.00
JCB	0	0.00
Totals	0	0.00

Denomination	Coupon Count	Amount
Totals	0	0.00

Denomination	Gift Certificate Count	Amount
Totals	0	0.00

Denomination	Mall Certificate Count	Amount
Totals	0	0.00

Denomination	Gift Card Count	Amount
Totals	0	0.00

Figure 3–15   Till Count Detail Report - Second Part

Denomination	Traveler's Check	Amount
Totals	1	1,400.00

Denomination	Debit Count	Amount
Totals	0	0.00

Denomination	Store Credit Count	Amount
Totals	0	0.00

Denomination	Purchase Order Count	Amount
Totals	0	0.00

Denomination	Money Order Count	Amount
Totals	0	0.00

Totals	2,252.82
CA Totals	0.00

End of Report

Print   Export   Done

Bank Deposits

The Bank Deposit function creates a bank deposit and displays a report detailing individual totals that make up the deposit. The store must be open in order to perform a bank deposit, but it may be performed at any time during the day. The type of count performed depends on the setting for the Count Deposit Tender parameter. The parameter can either be set to Summary or Detail. Follow the set of steps for the appropriate setting:

- For a Summary count, see Creating a Summary Bank Deposit.

- For a Detail count, see Creating a Detail Bank Deposit.

Creating a Summary Bank Deposit

When the Count Deposit Tender parameter is set to Summary, the Select Bank Deposit Tender screen is used to enter the total amounts for deposit for each tender type.

To create a summary bank deposit:

1. Click the **StoreOps** tab.

2. Click the **Store** subtab.

3. Click the **Bank Deposit** left navigation link. The Select Bank Deposit Tender screen is displayed.

Figure 3–16   Summary Bank Deposit Tender Screen

4. In the Bank Deposit Tender screen, enter the total for each type of currency in the given fields.

5. Click **Refresh Total**.

6. To save the total, click **Save**. A report is displayed. See Store Bank Deposit Report.

Creating a Detail Bank Deposit

When the Count Deposit Tender parameter is set to Detail, the Select Bank Deposit Tender screen is used to select a tender type and then enter detailed information for the deposit. Only one tender type may be selected at a time. On this screen, you also calculate the amount for deposit.

To create a detail bank deposit:

1. Click the **StoreOps** tab.

2. Click the **Store** subtab.

3. Click the **Bank Deposit** left navigation link. The Select Bank Deposit Tender screen is displayed.

Figure 3–17   Select Bank Deposit Tender Screen

Select Bank Deposit Tender

Select a tender type for deposit, or select Save.   [Save]

Tender Type	Expected Total	Entered Total
Cash	919.68	919.68
Deposited Check	260.55	260.55
Traveler's Check	1,020.00	1,020.00
Money Order	40.00	40.00
CAD Cash	55.00	55.00
CAD Check	0.00	0.00
CAD Traveler's Check	0.00	0.00
Total	2,240.23	2,240.23
CAD Total	55.00	55.00

[Save]

4. To select a tender type for deposit, click the tender type name. The Detail Currency Count screen is displayed.

5. Enter the quantity of each type of tender.

   ■   To count cash, see Setting the Detail Currency Count.

   ■   To count checks, see Setting the Tender Detail.

6. Select another tender type or save the bank deposit. To save the bank deposit, click **Save**. A report is displayed. See Store Bank Deposit Report.

Setting the Detail Currency Count

The Detail Currency Count screen to used to count cash for a bank deposit, till reconcile, and till open. For each type of currency, enter the count. To view the total amount entered, click **Refresh Total**. When you are done entering counts, click **Next**.

Figure 3–18   Detail Currency Count Screen

Setting the Tender Detail

The Detail screen is used to count tender for a bank deposit or till reconcile. All entries and the total amount of all the entries are displayed.

Enter an amount for the tender and click **Add**. To remove an entry, check the box in the Select to Remove column next to the amount and click **Remove**. When you are done entering amounts, click **Next**.

Figure 3–19   Deposited Check Detail Screen

Store Bank Deposit Report

When a bank deposit is saved, the Store Bank Deposit report is displayed.

Figure 3–20   Store Bank Deposit Report

Bank Deposit Report

Select to Print or Export the report. Select Done to continue.   [Print] [Export] [Done]

Store Bank Deposit Report

07/17/2007	11:25 AM
Store: 04241	**Cashier:** pos

Cash Total	
919.68	

Check Total	
Count	Amount
2	260.55

Traveler's Check Total	
Count	Amount
6	1020.00

Money Order Total	
Count	Amount
1	40.00

Canadian Cash Total	
55.00	

Canadian Check Total	
Count	Amount
0	0.00

Canadian Traveler's Check Total	
Count	Amount
0	0.00

Total Deposit	
2240.23	

Total Canadian Deposit	
55.00	

[Print] [Export] [Done]

This report contains the following information:

- Date and time the bank deposit was created

- Store where the bank deposit was created

- User ID of the cashier who created the bank deposit

- Total amount for each type of tender and a count of the tender

- Total amount of the deposit

To export the report, click **Export**. To print the report, click **Print**. To return to the Select Bank Deposit Tender screen, click **Done**.

4

Reports

The Reports tab enables you to view, export, and print reports. The reports provide summaries of store activity and performance. The report output can be tailored based on ad hoc report settings. Reports viewed frequently can be added to a list of Favorite Reports. Favorite reports can be scheduled on a repeating basis.

> **Note:** Reports do not use the application default locale but are displayed in the English - United States locale. Dates are displayed in MM/DD/YYYY format. Time is displayed in HH:MM format.

For more information, see the following sections:

- Overview
- Accessing Reports
- My Favorite Reports
- Report Schedules
- Descriptions of Available Reports

Overview

From the Reports tab, you can access summary reports on the status of sales and financial data collected through Oracle Retail Point-of-Service.

Report Subtabs

Under the Reports tab, a report is accessed by choosing the appropriate subtab and left navigation link. Table 4–1 lists the available reports. For a description of each report, see Descriptions of Available Reports.

Table 4–1   Available Reports

Reports Subtab	Reports
Sales	■ Flash Sales
	■ Sales Summary by Register
	■ Hourly Productivity
Financial	■ Over and Short by Cashier
	■ Over and Short by Register
	■ Bank Deposit

Report Action Buttons

The action buttons in a report screen provide you with a variety of options specific to that screen. Table 4–2 lists the action buttons and describes what they do.

Table 4–2   Report Buttons

Button	Function
Add	Adds a report schedule
Add to Favorites	Adds a report to My Favorite Reports
Adhoc	Enables you to select criteria for viewing a report
Done	When viewing an ad hoc report, returns you to the displayed report screen where the Adhoc button was selected
Export	Exports a report to an external file
Print	Prints a report
Remove	Removes a favorite report
Save	Saves a report schedule definition
Schedule Report(s)	Adds reports to a report schedule
View	Displays a report based on the ad hoc report settings selected

Ad Hoc Report Settings

The Report Settings screen is used to tailor the report content. The start and end dates covered by the report and the report information that is included can be chosen.

The start and end dates for the report are chosen by selecting a reporting period or entering start and end dates. The following reporting periods can be selected from a menu:

- Today

- Week to Date

- Month to Date

- Year to Date

- Previous Day

- Previous Week

- Previous Month

- Previous Year

Report information sets which data is included in the ad hoc report. A store number can be entered and other options can be selected from menus. Each report with ad hoc capability has a subset of the following options enabled for selection:

- Store

- Department

- Merchandise Hierarchy

- Cashier

- Register

- Time Increment

An report information option may include the selection of All and None. None selects a summary of the data. For example, if you select All for Register, one row of data for each register is displayed in the report. If you select None, only one row is displayed with the data totalled for all registers.

For an example of a report settings screen, see Figure 4–2. To see the list of settings available for each report, see Descriptions of Available Reports.

Drill Down Reports

If you select a hyperlink within the report data, the drill down report is displayed with data for the selected hyperlink. For example, in a report that shows a list of departments, you can drill down to see data for a specific department. In most instances, the columns do not change when the drill down report is displayed. Drill down reports do not have the ad hoc capability.

Unavailable Data

Unavailable data in a report is handled in the following ways:

- If no data is available for a report, "No Data Available" is displayed.
- If specific data in a report is not available, dashes are displayed.

Report Header

The header portion of a report contains the following information:

- Title of the report
- The business start and end dates covered by the report or the current date for those reports which cover only the current business day
- The system date and time when the report was generated

Additional information is also included in the report when applicable:

- Store number, register number, and till number
- Name of the cashier responsible for the data covered in the report
- Report settings selected

Accessing Reports

You can view, export, and print reports. You can also save reports as favorite reports.

Viewing a Report

You can view any of the reports listed under the Reports tab. You can also select criteria for the report content.

To view a report:

1. Click the **Reports** tab.

2. Click the subtab of the report category you want to view.

3. Click a specific left navigation link to display that report.

Figure 4–1   Example of Displayed Report Screen

4. To see data for a different reporting period, select a report period from the menu.

5. To select criteria for the report content, click **Adhoc**. The Report Settings screen is displayed.

Figure 4–2   Example of Report Settings Screen

Changes to criteria can be made by entering new information into the fields or choosing different options from the menus.

6. To display the ad hoc report, click **View**.

Figure 4–3   Example of Adhoc Report Screen

7. To add the report to your favorites, click **Add to Favorites**. The report is added to the My Favorite Reports list. See Figure 4–4.

8. When you are done viewing the report, click **Done**.

Exporting a Report

The Export Report screen is used to export a displayed report. Exporting a report creates a new external file of the report that can be viewed outside of Oracle Retail Back Office.

To export a report:

1. Click **Export**. The Export Report screen is displayed.

2. Change the name of the exported file.

3. Select an output format from the menu. Table 4–3 describes the available formats.

Table 4–3   Output File Formats

Format Type	Definition
PDF	Portable Document Format, a read-only file that can be read using Adobe Reader
RTF	Text format, viewable in an application such as Notepad
HTML	A file with HTML tags that can be viewed as a web page
CSV	Comma separated values that can be read in software such as Microsoft Excel

4. To export the report, click **Save.** When you are done exporting the report, click **Done**.

Printing a Report

To print the report being displayed, click **Print**. Your web browser displays a print setup dialog box.

My Favorite Reports

Reports can be saved for easy access. These reports are saved under My Favorite Reports. The list of favorites is created by choosing the **Add to Favorites** button when viewing a report. You can schedule or view favorite reports, or remove the reports from the favorites list.

Viewing Favorite Reports

On the My Favorite Reports screen, you can view your favorite reports:

1. Click the **Reports** main tab.

2. Click the **My Favorite Reports** subtab. The My Favorite Reports screen is displayed.

Figure 4–4   My Favorite Reports Screen
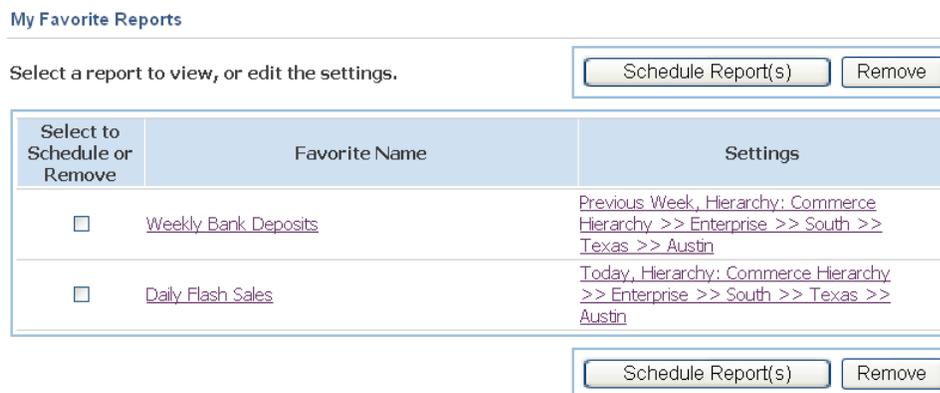
Table 4–4 describes the information shown for each favorite report.

Table 4–4   My Favorite Reports Columns

Column	Description
Select to Schedule or Remove	A checked box indicates the report is selected to be added to a report schedule or removed from this list
Favorite Name	Name assigned to the report
Settings	Report period and hierarchy chosen for the report

3. To display a report, click the link for the report in the Favorite Name column.

4. To add a report to a schedule, check the box in the Select to Schedule or Remove column and click **Schedule Report(s)**. The Report Schedule Definition screen is displayed. See Figure 4–6.

Editing Report Settings

On the Favorite Report screen, you can edit the settings for a favorite report. To edit the report settings:

1. Click the **My Favorite Reports** subtab.

2. Click the settings link across from the report name. The Favorite Report screen is displayed.

3. You can change the name of the favorite report and the date range. When you have made your changes, click **Save**.

Removing Favorite Reports

On the My Favorite Reports screen, you can remove any of the reports. To remove reports:

1. Click the **My Favorite Reports** subtab.

2. Check the boxes in the Select to Schedule or Remove column next to the reports to remove.

3. Click **Remove**. The reports are removed from the schedule.

Report Schedules

The Report Schedules screen displays a list of the define report schedules and enables you to add and remove report schedules.

A report schedule is used to execute favorite reports on a repeating basis. A report must be defined as a favorite report before it can be added to a report schedule.

To work with scheduled reports:

1. Click the **Report Schedules** subtab. The Report Schedules screen is displayed.

Figure 4–5   Report Schedules Screen

Table 4–5   Report Schedules Columns

Column	Description
Select to Remove	A checked box indicates the report schedule has been selected to be removed
Report Schedule Name	The name of the report schedule and the run date and time
Favorites Included	List of favorite reports included in the report schedule
Outputs	List of recipients and the type of output received when the report schedule executes

2. To edit an existing report schedule, click the name of the report schedule. The Report Schedule Definition screen is displayed. See Defining the Report Schedule.

3. To add a new report schedule, click **Add**. The Report Schedule Definition screen is displayed. See Defining the Report Schedule.

4. To remove a report schedule, check the box for the Report Schedule in the Select to Remove column. Click **Remove**.

Defining the Report Schedule

On the Report Schedule Definition screen, you select the settings for a report schedule.

Figure 4–6   Report Schedule Definition Screen

To set the report schedule:

1. Enter the schedule name.

2. To add a new favorite report to the schedule, select a report from the Favorites menu and click **Add**. To remove a report from the schedule, check the box in the Select to Remove column and click **Remove**.

3. Choose the run date and time.

   a. Enter the begin date.

   b. If you want to run the report on a repeating basis, click **Repeating**. Choose the end date and how often you want the report to be executed.

   c. Enter the run time. If you choose the report to be executed daily at an interval, enter the interval. For example, to execute the report every 30 minutes, enter 00:30. Otherwise, enter a time between 00:00 and 23:59 when you want the report to run. Click **Add**. The time is added to the list. Multiple times can be chosen. If you want to remove a time from the list, check the box in the Select to Remove column for the time and click **Remove**.

4. To send reports to an e-mail account, choose Email from the menu. Enter the e-mail address and choose the file type. Click **Add**.

5. Click **Save**. The report schedule is saved.

Removing Report Schedules

On the Report Schedules screen, you can remove any of the report schedules. To remove report schedules:

1. Click the **Report Schedules** subtab. The Report Schedules screen is displayed. See Figure 4–5.

2. Check the boxes in the Select to Remove column next to the report schedules you wish to remove.

3. To remove the selected schedules, click **Remove**.

Descriptions of Available Reports

These following types of reports are available through the Reports tab:

- Sales
- Financial

Sales

Sales reports present data on store sales. To access the reports, select the Sales subtab. The following reports are available by selecting a left navigation link:

- Flash Sales
- Sales Summary by Register
- Hourly Productivity

Flash Sales

The Flash Sales report displays information regarding store sales performance.

Figure 4–7   Flash Sales Report

Table 4–6 describes the columns in flash sales reports.

Table 4–6   Flash Sales Report Columns

Column	Description
Store Name	Identifier of the store whose flash sales are shown.
Department	Department whose flash sales are shown.
Merchandise Hierarchy	Level in the merchandise hierarchy whose flash sales are shown.
Number of Transactions	Total of the sales transactions sold plus the picked up layaway transactions plus the completed special orders transactions minus any post void transactions.
Number of Units	Total of the sale units sold plus the picked up layaway units plus the completed special orders units minus any post void units.
Average Units Per Transaction	Number of Units divided by the Number of Transactions.
Average Transaction	Total Sales divided by the Number of Transactions.
Total Sales	Total of the taxable sales plus the non-taxable sales. Taxable Sales equals the total of taxable items sold minus voids (tax not included). Includes the extended price of the item when a layaway or order is picked up. Non-taxable Sales equals the nontaxable items sold minus voids. Includes the extended price of the item when a layaway or order is picked up.
Total Returns	Total of the non-taxable returns plus the taxable returns minus tax.
Sales Less Returns	Total Sales minus Total Returns

Non-merchandise items, gift card sales, and gift card reloads are not included in the reports. Sales are reflected at the kit component level.

The order of the rows in any of the Flash Sales reports is based on the Sales Less Returns column. The entries are listed in descending order starting with the highest amount. For example, if the report shows a list of departments, the list starts with the department with the highest sales less returns amount. This makes it easy to identify the departments producing the most sales.

The following ad hoc criteria is available for this report:

- Reporting period or date range
- Store
- Department (All, None, or department name)
- Merchandise hierarchy (All, None, or merchandise hierarchy level)

Flash Sales Department Drill Down Selecting a store name link in the Flash Sales report displays this drill down report. Specific sales performance for each department in the store is shown.

Figure 4–8   Flash Sales Department Drill Down Report

For a description of the columns in this report, see Table 4–6.

Flash Sales Merchandise Hierarchy Drill Down Selecting a department in the Flash Sales Department Drill Down report displays the specific sales performance for the merchandise hierarchy in that department.

Figure 4–9   Flash Sales Merchandise Hierarchy Drill Down Report

For a description of the columns in this report, see Table 4–6.

Sales Summary by Register

The Sales Summary by Register report shows a summary of store sales by register for the current store. Register sales are based on gross sales and do not include sales tax.

Figure 4–10   Sales Summary by Register Report

Table 4–7 describes the columns in this report.

Table 4–7   Sales Summary by Register Report Columns

Column	Description
Register	Register whose sales are shown.
Number of Transactions	Total of the sales transactions sold plus the picked up layaway transactions plus the completed special orders transactions minus any post void transactions.
Number of Units	Total of the sale units sold plus the picked up layaway units plus the completed special orders units minus any post void units.
Average Units Per Transaction	Number of Units divided by the Number of Transactions.
Average Transaction	Total Sales divided by the Number of Transactions.
Total Sales	Total of the taxable sales plus the non-taxable sales.
	Taxable Sales equals the total of taxable items sold minus voids (tax not included). Includes the extended price of the item when a layaway or order is picked up.
	Non-taxable Sales equals the nontaxable items sold minus voids. Includes the extended price of the item when a layaway or order is picked up.

Table 4–7   (Cont.) Sales Summary by Register Report Columns

Column	Description
Total Returns	Total of the non-taxable returns plus the taxable returns minus tax.
Sales Less Returns	Total Sales minus Total Returns

Non-merchandise items, gift card sales, and gift card reloads are not included in the reports. Sales are reflected at the kit component level.

The order of the rows in any of the Flash Sales reports and the Sales Summary by Register report is based on the Sales Less Returns column. The entries are listed in descending order starting with the highest amount. For example, if the report shows a list of departments, the list starts with the department with the highest sales less returns amount. This makes it easy to identify the departments producing the most sales.

The following ad hoc criteria is available for this report:

- Reporting period or date range
- Store
- Register (All or register number)

Hourly Productivity

The Hourly Productivity report shows flash sales broken down by time increments, such as hours. Each row, or time increment, shows the cumulative total of each column since the start of the reporting period. To calculate the sale's performance for a specific time increment such as an hour, you need to manually subtract the hour's sales information from the next hour's sales information.

Figure 4–11   Hourly Productivity Report

Today's Hourly Productivity Report   Reports > Sales > Today's Hourly Productivity Report

Select to Ad hoc the report, Print the report, Export the report, Add to Favorites.

[Adhoc] [Print] [Export] [Add to Favorites]

Report Period: Today

Today's Hourly Productivity Report

| Start Date: | 07/21/2007 | | Run Date: | 07/21/2007 |
| End Date: | 07/21/2007 | | | 01:24 PM |

Time	Number Of Transactions	Average Transaction	Number Of Units	Average Units Per Transaction	Total Sales	Total Returns	Sales Less Returns	Percent of Sales
10:00 - 10:59 AM	-	-	-	-	-	-	-	-
11:00 - 11:59 AM	1	1290.94	2.00	2.00	1290.94	0.00	1290.94	88%
12:00 - 12:59 PM	2	735.46	5.00	2.50	1470.93	0.00	1470.93	100%
01:00 - 01:59 PM	2	735.46	5.00	2.50	1470.93	0.00	1470.93	100%

[Adhoc] [Print] [Export] [Add to Favorites]

Table 4–8 describes the columns in this report.

Table 4–8   Hourly Productivity Report Columns

Column	Description
Time	Time period for which sales are shown.
Number of Transactions	Total of the sales transactions sold plus the picked up layaway transactions plus the completed special orders transactions minus any post void transactions.
Number of Units	Total of the sale units sold plus the picked up layaway units plus the completed special orders units minus any post void units.
Average Units Per Transaction	Number of Units divided by the Number of Transactions.
Average Transaction	Total Sales divided by the Number of Transactions.
Total Sales	Total of the taxable sales plus the non-taxable sales.
	Taxable Sales equals the total of taxable items sold minus voids (tax not included). Includes the extended price of the item when a layaway or order is picked up.
	Non-taxable Sales equals the nontaxable items sold minus voids. Includes the extended price of the item when a layaway or order is picked up.
Total Returns	Total of the non-taxable returns plus the taxable returns minus tax.
Sales Less Returns	Total Sales minus Total Returns
Percent of Sales	Sales less Returns for the time period divided by total Sales Less Returns for the business day.

Non-merchandise items, gift card sales, and gift card reloads are not included in the reports. Sales are reflected at the kit component level.

> **Note:**   The default report displays every hour increment of the calendar day from 12:00 AM to 11:59 PM for all cashiers and all registers. Whenever a retailer has business hours other than the default 12:00 AM to 11:59 PM, the ad hoc report should be used.

The following ad hoc criteria is available for this report:

- Reporting period or date range (Year to Date and Previous Year are not available for this report)

- Store

- Time increment of 15, 30, or 60 minutes

- Register (All or register number)

- Cashier (All or cashier name)

If you select a reporting period other than Today, the time increments reflect productivity across the selected reporting period. For example, if you select the Month to Date reporting period, sales information for the month up through the current date is displayed broken out by the time increment. This enables you to identify special characteristics about the sales time periods across the reporting period.

Financial

Financial reports cover financial information. To access the reports, select the Financial subtab. The following reports are available by selecting a left navigation link:

- Bank Deposit

- Over and Short by Cashier

- Over and Short by Register

Bank Deposit

Throughout the course of a day, a retailer may need to deposit funds in a bank in order to reduce the amount of cash kept in the store. To track these deposits quickly and easily, the Bank Deposit Report is used.

The information about a deposit is entered in Back Office. The order of the deposits shown in the report is based on the creation date and time and starts with the most recent deposit for a given time period.

Figure 4–12   Bank Deposit Report

Table 4–9 describes the columns in the report.

Table 4–9   Bank Deposit Report Columns

Column	Description
Creation Date	The date on which the deposit was made.
Creation Time	The time the deposit was made.
Cashier	The first and last name of the cashier who made the deposit.
Deposit Amount	The total amount of the deposit for the tender type. The following tender types are displayed: ■ CASH ■ CHCK – Check ■ MNYO – Money Order ■ TRAV – Traveler's Check

The following ad hoc criteria is available for this report:

■ Reporting period or date range

Over and Short by Cashier

The Over and Short by Cashier Report is a record of reconciliations which resulted in a tender count over or under the expected amount. The main purpose for the report is to detect fraudulent behavior.

This report is useful for retailers who have a business practice of cashier responsibility. In some stores, a cashier is assigned a till with a certain amount of money. The till must have an appropriate amount of money in it at the end of the cashier's shift. This report enables the retailer to view the exact amounts the cashier is over or short on the assigned till for a given time period.

This list of cashiers shown in the report is listed alphabetically by name.

> **Note:** The Accountability parameter in the Point-of-Service Reconciliation parameter group must be set to "Cashier". Otherwise, this report displays the "No Data Available" message.

Figure 4–13   Over and Short by Cashier Report

Table 4–10 describes the columns in the report.

Table 4–10   Over and Short by Cashier Report Columns

Column	Description
Cashier	The first and last name of the cashier who was responsible for the count.
Tender Type	The type of tender in the register. The tenders are displayed in the same order as defined in the Tenders to Count at Till Reconcile parameter. See the Oracle Retail Strategic Store Solutions Configuration Guide for information on parameters.
Over/Short Amount	The amount the register is over or short. If the amount is over, a plus sign (+) is displayed next to the value. If the amount is under, the amount is enclosed in parentheses.

The following ad hoc criteria is available for this report:

■   Reporting period or date range

■   Store

■   Cashier (All or cashier name)

Over and Short by Register

The Over and Short by Register Report is a record of the reconciliation for a register.

The report provides a set of data that can be compared with the expected tender amount in the Point-of-Service. Typically, this report works in conjunction with the Over and Short by Cashier Report. If the retailer sees a persistent inconsistency in the Over and Short by Register Report, the retailer can access the Over and Short by Cashier Report and compare the register and the cashier who have worked on that register. The main purpose of this report is to detect fraudulent behavior.

This report is useful for retailers who have a business practice of register accountability. In some stores, several different employees may use the same register.

The Over and Short by register report enables the retailer to view the exact amounts any registers are over or short for a given time period.

Registers are displayed in the report whether the registers are open or closed. The registers are listed in order by register number.

> **Note:** The Accountability parameter in the Point-of-Service Reconciliation parameter group must be set to "Register". Otherwise, this report displays the "No Data Available" message.

Figure 4–14   Over and Short by Register Report

Table 4–11 describes the columns in the report.

Table 4–11   Over and Short by Register Report Columns

Column	Description
Date	The date on which the over or short occurred.
Register ID	The identifier of the register where the over or short occurred.
Tender Type	The type of tender in the register. The tenders are displayed in the same order as defined in the Tenders to Count at Till Reconcile parameter. See the Oracle Retail Strategic Store Solutions Configuration Guide for information on parameters.
Over/Short Amount	The amount the register is over or short. If the amount is over, a plus sign (+) is displayed next to the value. If the amount is under, the amount is enclosed in parentheses.

The following ad hoc criteria is available for this report:

■ Reporting period or date range

■ Store

■ Register (All or register number)

5

Pricing

The Pricing tab enables you to create or edit prices through Price Promotions, Price Changes, and Discount Rule options. Price promotions are temporary price reductions for a set period of time while price changes are permanent changes in the price of an item or group of items. Discount rules are used to apply price promotions to combinations of items or multiple items for a temporary time period.

> **Note:** If pricing information is being downloaded through Oracle Retail Price Management, any changes made through the Back Office Pricing tab will be overridden the next time pricing information is downloaded.

The following topics are discussed:

- Price Promotions
- Price Changes
- Discount Rules

Price Promotions

Price promotions are temporary price reductions for a set period of time. You can search for, create, and edit price promotions. When creating a price promotion, you enter the name and description of the promotion, the starting and ending dates, the type of price reduction, and the amount of the reduction. You can then add items included in the price promotion. You can also search for a price promotion, edit summary information, change promotional prices, and add or remove items from the promotion.

Searching for Price Promotions

The Price Promotion Search screen enables you to search and edit pending price promotions.

To search for price promotions:

1. Click the **Pricing** tab.

2. Click the **Price Promotion** subtab.

3. Click the **Search** left navigation link. The Price Promotion Search screen is displayed.

Figure 5–1   Price Promotion Search Screen

4. Enter search criteria and click **Search**. You can search by promotion ID, promotion name, start date, or end date.

5. If more than one matching result is found, select a promotion ID from the displayed list. The details of the promotion are displayed. See Adding or Editing a Price Promotion.

Note: If only one matching result is found, the details of the promotion are automatically displayed, and step 5 is skipped.

Adding a Price Promotion

The add promotion function enables you to create a new price promotion.

To add a price promotion:

1. Click the **Pricing** tab.

2. Click the **Price Promotion** subtab.

3. Click the **Add** left navigation link. The Price Promotion Detail screen is displayed.

Adding or Editing a Price Promotion

You can edit an existing price promotion or a newly created price promotion on the Price Promotion Detail screen.

Figure 5–2   Price Promotion Detail Screen

To edit or add a price promotion:

1. Enter the required fields. Required fields include promotion name, start date, end date, promotion type, priority, start time, end time, and amount.

    > **Note:**   Enter a numerical value for promotion priority. The higher the number, the higher the priority. For example, 99 is a higher priority than 1.

2. To add an item to the promotion, enter the item number and click **Add**. A promotional price for the item is generated. Select a template type for the item.

    > **Note:**   You can edit the promotional price that is calculated by the system. The new price is displayed on the Promotion Detail screen.

3. To save the promotion, click **Save**. To return to Price Promotion Search page, click **Done**.

Editing the Item Price for a Price Promotion

On the Price Promotion Item Detail screen, you can change the new regular price of an item within a price promotion.

To change the price of an item:

1. Click the current price of the item you wish to change. The Price Promotion Item Detail screen is displayed.

Figure 5–3   Price Promotion Item Detail Screen

2. Enter a new selling price.
3. To save the new price, click **Save**. The Price Promotion Detail screen is displayed. See Figure 5–2. You can select another price to change.

Price Changes

The price change function enables you to create and edit a permanent price change for a group of items or to search for a pending price change based on specific criteria. You can search for price changes, add a price change, or edit the details of an existing or new price change.

Searching for Price Changes

On the Price Change screen, you can search for existing price changes.

To search for a price change:

1. Click the **Pricing** tab.

2. Click the **Price Change** subtab.

3. Click the **Search** left navigation link. The Price Change Search screen is displayed.

Figure 5–4   Price Change Search Screen

4. Enter the search criteria. If no criteria is entered, the search is done for all pending price changes.

5. Click **Search**.

6. If more than one matching result is found, select a price change ID from the displayed list. The details of the price change are displayed. See Adding or Editing a Price Change.

> **Note:** If only one matching result is found, the details of the promotion are automatically displayed and step 6 is skipped.

Adding or Editing a Price Change

The Price Change Detail screen enables you to edit price change details, add a new item to a price change, or change the price of an item within a price change.

Figure 5–5   Price Change Detail Screen

To edit or add a price change:

1. Edit or enter the details for the price change:

   - Select a price change type. For a price change that takes effect at a later date, click **Future.** For a price change that takes effect immediately, click **Immediate**.

   - Type in a new price change description.

   - Enter a new effective date.

   - Remove an item from the price change. Check the box next to the item and click **Remove**.

   - Add an item to the price change. Type in an item number and click **Add**. The new item appears at the bottom of the screen.

   - Change the price of an existing item. See Editing the Item Price for a Price Change.

   - Change the template type for the item.

2. To save all changes, click **Save**.

3. To return to the Price Change Search screen, click **Done**. The previous results are displayed at the bottom of the screen.

Editing the Item Price for a Price Change

On the Price Change Item Detail screen, you can change the new regular price of an item within a price change.

To change the price of an item:

1. Click the current price of the item you wish to change. The Price Change Item Detail screen is displayed.

Figure 5–6 Price Change Item Detail Screen

2. Enter a new selling price.

3. To save the new price, click **Save**. The Price Change Detail screen is displayed. See Figure 5–5. You can select another price to change.

Adding a Price Change

To add a price change:

1. Click the **Pricing** tab.

2. Click the **Price Change** subtab.

3. Click the **Add** left navigation link. The Price Change Detail screen is displayed. See Figure 5–5.

4. Enter the price change information. Refer to Adding or Editing a Price Change.

Discount Rules

Discount rules are created to temporarily reduce the price of an item or group of items. The discount rules apply to multiples or combinations of items. You can search for, create, edit, or end discount rules.

Discount Rules Terminology

Table 5–1 provides a list of terms used in the discount rules subtab.

Table 5–1   Terminology

Term	Definition
Source	Product that must be purchased before the target is eligible for a discount
Target	Product that is eligible for a discount once the source is met
Item	A specific product (for example, Levi's 501 Jeans)
Class	A group of items whose members have an attribute, (for example, jeans)
Department	A large collection of items that share a common denominator (for example, Women's Apparel)

Searching for Discount Rules

On the Discount Rule Search screen, you can search for existing discount rules by discount rule ID, name, type, start and end dates, source, or target.

1. Click the **Pricing** tab.

2. Click the **Discount Rule** subtab.

3. Click the **Search** left navigation link. The Discount Rule Search screen is displayed.

Figure 5–7   Discount Rule Search Screen

4. Enter the search criteria in the given fields. If no criteria is entered, the search is done for all active discount rules.

5. You can choose how to sort search results. If you do not choose to sort results, the results are sorted by the default criteria.

   - Select which criteria to sort by from the menu.

   - To include expired discount rules, click **Yes**. Otherwise, click **No**.

6. To search for a discount rule, click **Search**. To clear the search criteria, click **Clear Search**. The search results are displayed.

7. If more than one matching result is found, select a discount rule ID from the displayed list. The details of the discount rule are displayed. See Editing a Discount Rule.

Adding Discount Rules

On the Discount Rule Add screen, you can add new discount rules to the database.

To add a discount rule:

1. Click the **Pricing** tab.

2. Click the **Discount Rule** subtab.

3. Click the **Add** left navigation link. The Discount Rule Add screen is displayed.

Figure 5–8   Discount Rule Add Screen

4. Enter the discount rule name. This is a free text field to describe the discount rule.

5. Select the discount rule type from the menu. See Discount Rule Types for examples and definitions of the different discount rules.

6. Select the source and target from the menus. You can select item, class, or department for the source and target.

7. Enter start and end dates or select from the calendar next to the field box.

8. Enter starting and ending times.

9. Click **Next**. The Discount Rule Edit screen is displayed.

> **Note:** If not all fields are entered, you receive an error message asking you to complete all fields before continuing. If successful, a message is displayed with the assigned rule ID.

Editing a Discount Rule

On the Discount Rule Detail screen, you can view, edit, or end an existing discount rule. If the discount rule is pending or expired, you can edit the name of the rule, the start and end dates, the start and end times, the limit and threshold amounts, quantity, items, classes and departments eligible for specific group discounts. If the rule is active, you can only edit the end date and time.

To edit a discount rule:

1. On the Discount Rule Search screen, click the Discount Rule ID. The Discount Rule Detail screen is displayed.

Figure 5–9   Discount Rule Detail Screen

Table 5–2 describes the fields on this screen.

Table 5–2   Discount Rule Detail Screen Fields

Field	Description
Discount Rule ID	Identifier of this discount rule.
Discount Rule Name	Name for this discount rule.
Discount Rule Type	Type of discount for this rule.
Start Date and Start Time	The date and time when this discount rule goes into effect.
End Date and End Time	The date and time when this discount rule expires.
Source Threshold	Minimum price allowed for a source to be part of this rule.
Source Limit	Maximum price allowed for a source to be part of this rule.
Target Threshold	Minimum price allowed for a target to be part of this rule.
Target Limit	Maximum price allowed for a target to be part of this rule.
Percent Off, Dollar Off, Fixed Price	Discount percentage or amount applied to the target.
Number of Times per Transaction	Maximum number of times this rule can be applied in a transaction. Used when **Allow Source to Repeat** is set to Yes.
Accounting Method	Determines if this rule is described as a discount or markdown for accounting purposes.
Allow Source to Repeat	Determines if this rule can be applied more than once in a transaction. If set to Yes, the **Number of Times per Transaction** is used to set the maximum number of times this rule can be applied in a transaction.
Deal Distribution	If set to Source, the discount amount is applied only to the target. If set to Source Target, the discount amount is divided between the source and target.
Add Source and Target fields	
Source Item Number	SKU number assigned to the source.
Quantity	Quantity of the source that must be purchased to get the discount on the target.
Target Item Number	SKU number assigned to the target.
Quantity	Quantity of the target that must be purchased to get the discount.
Sources fields	
Include ANY Source(s)	If selected, the customer must purchase the minimum number of the source items to qualify for the discount on the target items. Choose the minimum number that must be purchased from the menu.
Include ALL Sources	If selected, the customer must purchase all of the source items to qualify for the discount on the target items.
Select to Remove	A checked box indicates the source has been selected to be removed from the rule.
Item Number	SKU number assigned to the source.
Description	Description of the source item.
Quantity	Quantity of this item that must be purchased to qualify for the discount on the target.
Price	Price of the item.

Table 5–2   (Cont.) Discount Rule Detail Screen Fields

Field	Description
Targets fields	
Include ANY Target(s)	If selected, the customer must purchase the minimum number of the target items to qualify for the discount. Choose the minimum number that must be purchased from the menu.
Include ALL Targets	If selected, the customer must purchase all of the target items to qualify for the discount.
Select to Remove	A checked box indicates the target has been selected to be removed from the rule.
Item Number	SKU number assigned to the target.
Description	Description of the target item.
Quantity	Quantity of this item that must be purchased to get the discount.
Price	Price of the item without the discount applied.

2. Change the rule information.

3. Add source and target items to the rule.

   - To add a source, enter the item number and quantity and click **Add**. The item is added to the Sources list.

   - To add a target, enter the item number and quantity and click **Add**. The item is added to the Targets list.

4. Change the list of source and target items.

   - Change the number of source items that must be purchased to qualify for the discount on the target items.

     – If a minimum number of the source items must be purchased, select **Include ANY Source(s)** and select the minimum number of items from the menu.

     – If all source items must be purchased, select **Include ALL Sources**.

   - Change the number of target items that must be purchased to qualify for the discount.

     – If a minimum number of the target items must be purchased, select **Include ANY Target**(s) and select the minimum number of items from the menu.

     – If all target items must be purchased, select **Include ALL Targets**.

   - To remove a source or target, check the box in the Select to Remove column. Click **Remove**.

5. To end a discount rule, edit the end date and time to the current date and time.

6. To save your changes, click **Save**. The Discount Rule Search screen is displayed.

Discount Rule Types

Table 5–3 describes the variables used in the discount rule examples in Table 5–4.

Table 5–3   Discount Rule Definitions

Letter	Name	Description
x	Source	Product that must be purchased before the target is eligible for a discount
y	Target	Product eligible for a discount once source is met
z	Price/Discount	Discount amount or percentage applied to the target
n	Quantity	Number of source that must be purchased to receive a discount
a	Amount	Amount of source that must be purchased to receive a discount

Note: x(source) and y(target) can be the same item.

Table 5–4 lists examples of discount rules.

Table 5–4   Discount Rule Examples

Discount Rule	Example
Buy n of X, get Y at Z% off	Buy 2(=n) pair of jeans(=x), get a sweater(=y) at 50%(=z) off
Buy n of X, get Y at $Z off	Buy 1(=n) suit coat, get a dress shirt (=y) for $10 off
Buy n of X, get Y at $Z	Buy 2(=n) shirts, get a pair of pants (=y) for $10
Buy n of X, get the highest priced X at Z% off	Buy 3 items, get 10% off highest priced item. Item A is $19.99, item B is 15.99, item C is 10.00. Since item A is the highest item, $1.99 (10% of $19.99) is taken off the total.
Buy n of X, get the lowest priced X at Z% off	Buy 3 items, get 10% off lowest priced item. Item A is $19.99, item B is $15.99, item C is $10.00 Since item C is the lowest item, $1.00(10% off $10.00) is taken off the total.
Buy a or more of X, get item Y at $Z off	Buy $20 (=a) of Sporting Goods (=x), get $10(=z) off a basketball item (=y)
Buy a or more of X, get Y at Z% off	Buy $20(=a) of Sporting goods(=X), get 10%(=z) off a baseball cap (=y)
Buy a or more of X, get Y for $Z	Buy $500(=a) worth of jewelry(=x), get a pair of earrings(=y) for $25(z)

Group Discounts

Group discounts allow the customer to purchase a specified quantity of a particular item (x) to receive a discount on that item.

Table 5–5 describes the variables used in the group discount examples in Table 5–6.

Table 5–5   Group Discount Definitions

Letter	Name	Description
n	Quantity	Number or amount of X purchased to be eligible for discount
x	Source/Target	Item or group of items that must be purchased to receive discount on that item or group of items
z	Discount	Discount applied to X

> **Note:**   Prices for X can be different.

Table 5–6 lists examples of group discounts.

Table 5–6   Group Discount Examples

Group Discount	Examples
Buy n of X, get purchase for $Z	Buy 2(=n) pair of jeans(=X), get them for $50(=Z)
Buy n of X, get Z% or $Z off	Buy 3(=n) pair of jeans(=X), get 35%(=Z) off total

6

Employees

The Employees tab enables you to manage employee information. You can search for employees, add new and temporary employees, and edit employee security roles. Employees can clock in and out and view their collected time for the week, while managers can adjust time, confirm hours, and view employee time reports.

The following topics are discussed:

- Employee Management
- Clocking In/Out
- Time Maintenance

Employee Management

You can search for employees and modify an employee's name, role, or status. You can also add permanent and temporary employees to the database. However, employees may not be removed from the database.

Searching for Employees

On the Employee Search screen, users can search for employees based on employee's first and last name, ID, or role as well as modify employee information. Employee information consists of the employee name, employee ID, login ID, password, role, and status.

To search for an employee:

1. Click the **Employee** tab.

2. Click the **Employee** subtab if it is not chosen.

3. Click the **Search** left navigation link. The Employee Search screen is displayed.

Figure 6–1   Employee Search Screen

4. Enter the search criteria. You can search by employee's ID, first and last name, or role.

   When searching by first and last name, you can enter the employee's full name or at least the first two characters of the first and last names.

5. Click **Search**.

   ■ If the employee is found, the details of the employee are displayed on the Employee Master screen. This screen has the same fields as the example in Figure 6–3. If the employee is temporary, the Temporary Employee Master screen is displayed. This screen has the same fields as the example in Figure 6–4.

   ■ If more than one employee is found, the list of matching employees is shown in the Results section.

Figure 6–2   Employee Search Screen with Results

Click the employee name link of the employee to view that employee's information.

Adding a Permanent Employee

The Add Employee screen is used to add new permanent employees to the database. You enter employee information and assign a security role to the employee.

To add an employee:

1. Click the **Employee** tab.

2. Click the **Employee** subtab.

3. Click **Add**. The Add Employee screen is displayed.

Figure 6–3   Add Employee Screen

4. Enter the employee's first and last name in the given fields. The employee's middle name is optional.

5. Enter the employee ID. The employee ID should be a number from 1 to 99999.

6. Enter the employee login ID. A temporary password is automatically assigned to the employee.

7. Select a role from the menu. A role defines the amount of access the employee has to specific Oracle Retail Back Office and Point-of-Service functions.

> **Note:**   Roles can be specified by the manager. Refer to Security Roles for information on editing security roles.

8. Select an employee status from the menu. If the employee is actively working, click **Active**. If the employee is not currently working, click **Inactive**.

9. To save the information, click **Save**.

   - If the information matches an existing employee, the Duplicate Employee screen is displayed.

   - The temporary password is displayed. It should be written down and given to the new employee. This is the only time the password is displayed.

Adding a Temporary Employee

The Add Temporary Employee screen is used to add new temporary employees to the database. You can enter employee information and assign a security role to the employee. An employee ID is automatically assigned for a temporary employee.

To add an employee:

1. Click the **Employee** tab.

2. Click the **Employee** subtab.

3. Click **Add Temp**. The Add Temporary Employee screen is displayed.

Figure 6–4   Add Temporary Employee Screen

Add Temporary Employee

Enter employee Information and select Save.   [Save]

First Name:	Davidson	*
Middle Name:	Steven	
Last Name:	Guest	*
Employee ID:	5	
Employee Login ID:	dguest	*
Role:	No Access	
Store #:	04241	*
Days Valid:	14	
Status:	Active	

* = Required

[Save]

4. Enter the employee's first and last name in the given fields. The employee's middle name is optional.

5. Enter the employee login ID. A temporary password is automatically assigned to the employee.

6. Select a role from the menu. A role defines the amount of access the employee has to specific Oracle Retail Back Office and Point-of-Service functions.

> **Note:**   Roles can be specified by the manager. Refer to Security Roles for information on editing security roles.

7. Enter the store number and select the number of days the employee will be working.

8. Select an employee status from the menu. If the employee is actively working, click **Active**. If the employee is not currently working, click **Inactive**.

9. To save the information, click **Save**.

   - If the information matches an existing employee, the Duplicate Employee screen is displayed.

   - The temporary password is displayed. It should be written down and given to the new employee. This is the only time the password is displayed.

Changing Employee Information

The Employee Master screen is used to make changes for permanent employees. The Temporary Master screen is used to make changes for temporary employees.

To change employee information:

1. Change the employee's name, employee ID, or login ID.

2. Select a new role or status from the available menus. The Confirm Status Change dialog is displayed.

   - To confirm the change, click **Yes**.

   - To not change the role assignment or status, click **No**.

3. If the employee is a temporary employee, enter the store number or select the number of days the employee will be working.

4. To reset the password, click **Reset Password**. The Reset Password dialog is displayed.

   - To confirm the password reset, click **Yes**. The temporary password is displayed. It should be written down and given to the employee. This is the only time the password is displayed.

   - To not reset the password, click **No**.

5. Click **Save**. The Employee Search screen is displayed. See Figure 6–1.

Duplicate Employee

If the permanent or temporary employee entered has the same information as an existing employee, the Duplicate Employee screen is displayed. The current employee and any possible matches are displayed.

Figure 6–5   Duplicate Employee Screen

You can choose to select an existing employee or save the information for the newly added employee.

- To view the information for the existing employee, click the employee's name link.

- To save the new employee's information, click **Save**.

- To return to the Add Employee or Add Temporary Employee screen, click **Back**.

Security Roles

The role assigned to an employee enables that employee access to specific functions in Oracle Retail Back Office and Point-of-Service. The administrator can define and modify security roles and may allow employees access to all or certain applications or modules (parts of an application). The access points set for a role determine what functionality is available to the user. If the functionality is not available to the user, the button or link that executes the function is not displayed.

To access roles:

1. Click the **Employee** tab.

2. Click the **Employee** subtab.

3. Click the **Roles** left navigation link. The Roles screen is displayed.

Figure 6–6   Roles Screen

4. To view the settings for a role, click the name in the list. The Role Settings screen is displayed for that security role. See Figure 6–8.

5. Select an application from the menu to include in the chosen role. To include all applications, click **All**. Applications are the software applications used by the store, including Oracle Retail Back Office and Point-of-Service.

6. Select a module from the menu. A module is one part of an application. For example, the Employee tab is one module of Oracle Retail Back Office.

7. Select specific features to include in the role setting. Check the boxes next to the feature names or click **Select All** to select all features in the list.

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

9. Click another role in order to view or change the settings.

Changing a Role

To change the features selected for a role on the Roles screen:

1. Click the name in the Role column. The Role Settings screen is displayed. See Figure 6–8.

2. Choose the features to be added or removed for this role.

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

Removing a Role

To remove a role on the Roles screen:

1. Check the box in the Select to Remove column for the role you want to remove.

2. Click **Remove**. The Confirm Role(s) Removal screen is displayed.

   - If you want to remove all the selected groups, click **Yes**. The roles are removed.

   - If you do not want to remove all the selected groups, click **No**. The role is not removed and the Select to Remove box remains selected.

Adding a New Role

To add a new role on the Roles screen:

1. Click **Add**. The Role Name screen is displayed.

Figure 6–7   Role Name Screen

2. Enter the name for the role. click **Next**. The Role Settings screen is displayed. See Changing the Settings for a Role.

Changing the Settings for a Role

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

Figure 6–8   Role Settings Screen

Table 6–1 describes the information shown for each feature.

Table 6–1   Role Settings Column

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

To change the settings for the role:

1. Choose the features that can be accessed:

    a. Click **Application**. Click the application whose features you want to choose.

    b. Click **Module**. Click the module whose features you want to choose. The features available for that function are shown.

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

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

2. When you have made choices for all the applications and modules that you want, click **Save**. The role settings are saved.

Clocking In/Out

The Employee Time Capture screen is used by employees to clock in and out. Employees must clock in and out at the beginning and end of a shift, break, or meal. Capturing employee time is necessary in maintaining payroll, attendance, and time-related benefits. Clocking in and out in Oracle Retail Back Office eliminates the use of manual timesheets as the time capture saves the employee clock in and out times and compiles them into a report.

To clock in or out:

1. Log in to Oracle Retail Back Office using your employee user ID and password. For information on logging in, see Logging In in Chapter 1.

2. Click the **Employee** tab.

3. Click the **Clock In/Out** subtab. The Employee Time Capture screen is displayed.

Figure 6–9   Employee Time Capture Screen

4. Select an entry type from the menu. The entry type is either In or Out.

5. Select a reason from the menu. Reason options are: Break, lunch, Start of day, and End of day.

6. Click **Next**. The Successful Time Entry screen is displayed.

7. To return to the Employee Search screen, click **Enter**.

Time Maintenance

The Time Maintenance function enables you to view employee time summaries and time reports. You can confirm employee hours as well as view and edit employee hours. Authorized managers can enter and edit time entries made at Oracle Retail Back Office or Point-of-Service. You can also export a list of employees and their collected hours.

Viewing or Changing Employee Time

On the Employee Time Summary screen, a manager can view the hours for any employee and print a report of a single or multiple employees.

To view employee time:

1. Click the **Employee** tab.

2. Click the **Time Maintenance** subtab.

3. Click the **Employee Time Maintenance** left navigation link. The Employee Time Summary screen is displayed.

Figure 6–10   Employee Time Summary Screen

From this screen, you can do the following:

- View the time for an employee by clicking the employee's ID. See Viewing or Editing Employee Time.

- Confirm hours by clicking **Confirm Hours**. Refer to Confirming Employee Hours for more information on confirming hours.

- Print the employee data. Check the box in the Print column for the employee data you want to print. Click **Print Report**. See Employee Time Reports.

Exporting Employee Data

The Export Employee Data screen is used to export the data displayed on the Employee Time Summary screen. To export the employee data:

1. Click the **Employee** tab.

2. Click the **Time Maintenance** subtab.

3. Click the **Employee Time Maintenance** left navigation link. The Employee Time Summary screen is displayed. See Figure 6–10.

4. Check the box in the Print column next to the name of each employee you wish to include.

5. Click **Export**. The Export Employee Data screen is displayed.

Figure 6–11 Export Employee Data Screen

6. Enter a file name in the field.

7. Select an output from the menu. You can select HTM or PDF as the output format.

8. To save the data as an external file, click **Save**. To return to the Employee Time Summary screen, click **Done**.

Viewing or Editing Employee Time

The Employee Hours by Date screen is used by managers to view or edit employee hours for the current week. For example, editing employee hours may be necessary when an employee forgets to clock in or out.

To edit an employee's time:

1. Click the **Employee** tab.

2. Click the **Time Maintenance** subtab.

3. Click the **Employee Time Maintenance** left navigation link. The Employee Time Summary screen is displayed. See Figure 6–10.

4. To review an employee's hours, click the employee ID link of the specific employee. The Employee Hours by Date screen is displayed.

Figure 6–12   Employee Hours by Date Screen

5. Click the date link of the hours you wish to view. The Edit Employee Hours screen is displayed.

Editing Employee Hours

On the Edit Employee Hours screen, you can view and change the time entries for a specific day.

Figure 6–13   Edit Employee Hours Screen

Note: Question marks (??:??) indicate a missing time entry.

To edit the employee hours:

1. Edit the time information.

   - To edit time, enter a new time as HH:MM and select AM or PM from the menus.

   - To add a type and reason for edit, select from the provided menus.

   - To remove a time entry, check the box next to the entry and click **Remove**.

   - To add a time entry, click **Add**. Another time entry option is added.

2. To save the changes, click **Save**. The information on the Edit Employee Hours screen is updated.

Confirming Employee Hours

The Confirm Employee Hours screen enables a manager to validate an employee's hours for the given week. The hours can only be confirmed at the end of a work week.

To confirm an employee's hours:

1. Click the **Employee** tab.

2. Click the **Time Management** subtab.

3. Click the **Confirm Employee Hours** left navigation link.

   > **Note:** The Confirm Employee Hours screen can also be accessed from the Employee Time Summary screen.

4. To edit the employee's hours, click **Edit**. The Employee Time Summary screen is displayed. See Figure 6–10. To edit the hours, see Viewing or Editing Employee Time.

5. To return to the confirmation screen, click **Confirm Employee Hours**.

Viewing Employee Time Reports

The Time Report Options screen is used to select the type of time report you want to view, export, or print. You can work with a summary or detailed report. For information on printing and exporting reports, see Chapter 4.

   > **Note:** Reports are not displayed in the default locale for the application. Dates are displayed in MM/DD/YYYY format. Time is displayed in HH:MM format.

To view employee time reports:

1. Click the **Employee** tab.

2. Click the **Time Maintenance** subtab.

3. Click the **Employee Time Reports** left navigation link. The Time Report Options screen is displayed.

Figure 6–14   Time Report Options Screen

4.   Select an employee from the menu. To select all employees, click **All**.

5.   Enter starting and ending dates.

6.   Select a Report type, either Summary or Detail.

7.   Click **Next**. The time report is displayed. See Employee Time Reports.

Employee Time Reports

Employee time reports are displayed from the Employee Time Summary screen and through the Employee Time Reports left navigation link.

On the Time Report Options screen, you can select the report type. If Summary is selected, the Summary Employee Time Report is displayed. See Summary Employee Time Report. If Detail is selected, the Detail Employee Time Report is displayed. See Detail Employee Time Report.

When you are done viewing the report, click **Done**. To export the report, click **Export**. To print the report, click **Print**.

Summary Employee Time Report This report shows a list of employees and the total time entered in each category for each employee during the selected dates.

Figure 6–15   Summary Employee Time Report

The following information is displayed in the report:

- Report header:
  - Start and end dates and times covered in the report
  - Date and time the report was run
  - Store number and name
- For each employee:
  - Employee ID
  - Employee first and last name
  - Total hours for each time entry type
  - Totals for regular hours, other hours, and total hours
- Total hours for each time entry type for all employees in the report

Detail Employee Time Report

This report shows a list of employees and the time entries made for each employee during the selected dates.

Figure 6–16   Detail Employee Time Report

The following information is displayed in the report:

■   Report header:

–   Start and end dates and times for the report

–   Date and time the report was run

–   Store number

■   For each employee:

–   Employee ID

–   Employee name

- For each date in the report range that had a time entry:

  * Day of the week

  * Type of entry with the in and out times, reason if hours were edited, and total hours for that entry type

- The totals for regular hours, other hours, and total hours

■ Total hours for each time entry type for all employees in the report

Viewing My Time

The View My Time feature is only available to the employee logged into Oracle Retail Back Office. The employee can use this option to view time entries and any adjusted time for the current work week.

To view my time:

1. Log in to Oracle Retail Back Office using your employee user ID and password. For information on logging in, see Logging In in Chapter 1.

2. Click the **Employee** tab.

3. Click the **Time Maintenance** subtab.

4. Click the **View My Time** left navigation link. The Employee Hours by Date screen is displayed. Refer to Figure 6–12.

5. To view or edit hours for a particular day, select that date from the list. The Edit Employee Hours screen is displayed. Refer to Figure 6–13.

6. Edit the time information if needed. For help editing the information, refer to Viewing or Editing Employee Time.

   ■ To edit time, enter a new time as HH:MM and select AM or PM from the menu.

   ■ Select type and reason for edit from the provided menus.

   ■ To remove a time entry, check the box next to the entry and click **Remove**.

   ■ To add a time entry, click **Add**. Another time entry option is added.

7. To save the changes, click **Save**.

7

Administrative Functions

The Admin tab provides access to job schedules and parameters. The job manager functionality enables you, if authorized, to create and schedule jobs, edit currently scheduled jobs, or remove jobs. You can also edit parameters that affect various application functions and maintain foreign exchange rates.

The following topics are discussed:

- Job Manager
- Parameter Maintenance

Job Manager

The Job Manager function enables you to create and schedule data movement jobs such as parameter distributions, file transfers, and the run of reports. A job is a system process that can be scheduled to perform an operation in Oracle Retail Back Office. When a job runs, the system writes the data from an imported file to the database in the system. For example, the Job Manager can choose to import a file of parameter updates and then schedule the system to execute those updates at a specific time. The job manager function enables you to add jobs, edit existing jobs, select registers as recipients of jobs, enter notifications of failure and success of jobs, and view and edit job settings.

Importing and Exporting Files

XML files are created on another system to be imported into Oracle Retail Back Office. Files can also be exported from Back Office to other systems.

Importing Data

On the Available Imports screen, you can select XML files are created on another system to be imported into Oracle Retail Back Office.

Table 7–1 describes the available import tasks.

Table 7–1   Description of Import Tasks

Task	Description
Import Labels and Tags Template	■ Used to import templates for labels and tags to stores. ■ This import is only available if the Oracle Retail Label and Tags product has been installed. ■ Zip files can be distributed.
Import Labels and Tags Batch	■ Used to import corporate batches for printing labels and tags. ■ This import is only available if the Oracle Retail Label and Tags product has been installed. ■ Imports XML of the labels and tags content to be printed.
Labels and Tags Batch Trigger Processor	■ Used to import batches created by triggers. ■ This import is only available if the Oracle Retail Label and Tags product has been installed. ■ Imports XML of the labels and tags content to be printed.
Transaction Post Processor	■ Creates summary data for use in reporting. ■ Should be scheduled to run on a repeating basis, after system installation, so that the transactions coming in via the POSlog are summarized for reporting.
Import Parameters for Distribution	■ Used whenever new parameters must be added to the master set. ■ Must be performed initially when the application is installed. ■ Imports XML divided into parameter groups. Defaults to include the distributable and master set, both XML and database-stored parameters for the Oracle Retail Back Office and Point-of-Service applications.
Import BackOffice Parameters	■ Used whenever new parameters must be added to the Oracle Retail Back Office set. ■ Must be performed initially when the application is installed. ■ Imports XML divided into parameter groups. Includes the parameters used to control behavior in the Oracle Retail Back Office application. ■ For more information on specific parameters, see the Oracle Retail Strategic Store Solutions Configuration Guide.

To import files:

1. Click the **Admin** tab.

2. Click the **Job Manager** subtab.

3. Click the **Available Imports** left navigation link. The Available Imports screen is displayed.

Figure 7–1   Available Imports Screen

Table 7–2 describes the information shown for each available import.

Table 7–2   Available Imports Columns

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

4. Click the source link of the task to import. The Select Source-File screen is displayed.

Note: If the link is a schedule, the Job Manager screen is automatically displayed and you do not need to select a file.

Selecting the Source File

On the Select Source - File screen, you can select the file to be imported.

Figure 7–2   Select Source - File Screen

1. Enter the path name of the file to be imported or click **Browse** to choose a file.

2. Click **Next**. If the job is not yet scheduled, the Job Schedule screen is displayed.

Scheduling a Job

The Job Schedule screen enables you to select the run frequency of an import or export job. You can schedule a job to run at a specific time or interval.

To schedule a job, click **Immediate** or **Scheduled** on the Job Schedule screen.

Figure 7–3   Job Schedule Screen

- To run the job immediately, click **Immediate**. The Notification screen is displayed and you do not enter scheduling information.

- To run the job at a future date and time, click **Scheduled**. The Job Schedule screen is expanded. You must enter scheduling information.

Figure 7–4   Expanded Job Schedule Screen

If scheduling a job to run at a future time, you enter scheduling information on the expanded Job Schedule screen.

To schedule a job:

1. Enter or select a begin date.

2. If you want the job to run on a repeating schedule, click **Repeating**. If you do not want to run the job on a repeating schedule, skip this step.

    a. Select Last Run Date, Duration, or No End.

        If you select Last Run Date, enter a date or select one from the calendar.

        If you select Duration, enter the number of days the job will run. Select to notify you of Success, Failure, or All from the menu.

    b. Select to repeat Daily, Weekly, or Monthly from the menu.

    c. Select to run at a Start Time or Interval from the menu.

3. Enter a run time between 00:00 and 23:59. To add the time, click **Add**. To remove a time, check the box next to the time and click **Remove**. You may add multiple times if desired.

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

Adding a Notification

On the Notification screen, you can set the system to notify recipients of the failure or success of jobs. You may want to notify yourself and other store managers if a job runs successfully.

Figure 7–5   Notification Screen

To add a notification:

1. Select to notify of Success, Failure, or All from the menu.

2. Select a delivery method from the menu. The default delivery method is Email.

3. Enter a recipient's email address and click **Add**. To remove a recipient, check the box next to the name and click **Remove**.

4. Click **Next**.

Completing the Job Distribution

After setting a notification, the Distribution Summary screen may be displayed. This provides a summary of information about the job to be scheduled. The Distribution Summary enables you to edit the job name and approve the job schedule.

Figure 7–6   Distribution Summary Screen

To distribute the job:

1. Enter or edit the job name or accept the default.

2. Click **Submit Job**. The Distribution Confirmation screen is displayed.

Confirming the Job Distribution

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

Figure 7–7   Distribution Confirmation Screen

Click **Done** to return to the Available Imports or Available Exports screen where the process started.

Exporting Data

On the Available Exports screen, you can select data to be exported to other stores. Table 7–3 describes the available exports.

Table 7–3   Description of Available Export Tasks

Task	Description
File Transfer	■ Used to distribute any type of file for which a custom listener has been created at the receiving application. ■ One or more of any type of file can be attached for distribution.
Audit Log	■ Used to distribute the employee time maintenance audit log. ■ Exports an XML formatted journal of the time maintenance operations.

To export data:

1. Click the **Admin** tab.

2. Click the **Job Manager** subtab.

3. Click the **Available Exports** left navigation link. The Available Exports screen is displayed. This screen lists the available exports and a description of each export.

Figure 7–8   Available Exports Screen

4. Click the link in the Export Task Name column for the task to export. The File Selection screen is displayed.

Selecting the File to Export

On the File Selection screen, you select the files to be exported.

Figure 7–9   File Selection Screen

1. Enter the path name of the file or click **Browse** to choose a file. To add the file to the list, click **Add**.

2. When you have added all the files for the export, click **Next.** The Job Schedule screen is displayed. To complete the export, see Scheduling a Job.

Viewing Scheduled Jobs

On the Scheduled Job Summary, you view a list of currently scheduled jobs as well as the summary for any specific job that scheduled.

To view scheduled jobs:

1. Click the **Admin** tab.

2. Click the **Job Manager** subtab if it is not selected.

3. Click the **Scheduled Imports** or **Scheduled Exports** left navigation link. The list of scheduled imports or exports is displayed. The screen contains the job description, scheduled run, recipient (if any), action date, and job status.

4. Click the job description link to view the summary for that job. The Scheduled Job Summary screen is displayed.

Figure 7–10   Scheduled Job Summary

Table 7–4 describes the information shown in the Scheduled Job Summary screen.

Table 7–4   Scheduled Job Summary Details

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

5.   Click **Done**. Click another job description link to view the summary for that job.

Editing Scheduled Imports and Exports

You can edit any of the jobs that appear on the Scheduled Imports or Scheduled Exports screens. You can remove a job, select to run a job immediately, edit the job schedule, or change and add notifications for the job. Both of these screens have the same format. The Scheduled Imports screen is shown here as an example.

Figure 7–11   Scheduled Imports Screen

Table 7–5 describes the information shown for each available import on the Scheduled Import screen and for each available export on the Scheduled Export screen.

Table 7–5   Scheduled Imports and Scheduled Exports Columns

Column	Description
Select to Run Immediately or Remove	A checked box indicates the import can be selected to run immediately or removed
Description	Description of the import or export
Scheduled Run	Date and time when the job will next run
Recipient	Method of notification of job success or failure
Action Date	Date and time is determined by the status
Job Status	Status of the job

- To remove or run a scheduled job, check the box next to the job description.
    - To remove the schedule from the list, click **Remove**. You are asked to confirm the task removal. To remove the job, click **Yes**. To return to the previous screen, click **No**.
    - To run the import or export, click **Run Immediately**. The job status changes depending on the success of the action.

- To edit the job schedule, click the **Schedule** link under the job description. The Job Schedule screen is displayed. Refer to Scheduling a Job to edit the job schedule.

- To edit the notifications, click the **Notifications** link under the job description. The Notification screen is displayed. Refer to Adding a Notification to edit the notifications.

Parameter Maintenance

The parameter maintenance function enables you, if authorized, to create, manage, or remove parameter lists. The parameter values set to a parameter list override the current values that the store uses. You can edit, delete, or modify the parameters within a list or edit the values of specific parameters.

For more information on parameters, see the Oracle Retail Strategic Store Solutions Configuration Guide.

Maintaining Parameter Lists

On the Parameter Lists screen, you can create a list of parameters to be applied to Oracle Retail Back Office or Point-of-Service functions, view an existing list of parameters, or remove a parameter list.

To create or view a parameter list:

1. Click the **Admin** tab.

2. Click the **Parameter Maintenance** subtab.

3. Click the **Parameter Lists** left navigation link. The Parameter Lists screen is displayed.

Figure 7–12   Parameter Lists Screen

For each parameter list, the following information is displayed:

- A checked box in the Select to Remove column indicates the list is to be removed

- Parameter list name

- When the list was created

- User ID that created the list

4. You may remove, add, or edit a parameter list.

- To remove the list, check the box next to a parameter name and click **Remove**.

- To create the list, click **Add**. The List Details screen is displayed. See Adding or Changing Parameter List Details.

- To view an existing list, click the link of the parameter name. The List Details screen is displayed. See Adding or Changing Parameter List Details.

Adding or Changing Parameter List Details

You can edit the parameters of a newly created or previously existing list on the List Details screen. You may add or change the list name and description, add parameters to the list, or remove parameters from a list.

Figure 7–13   List Details Screen

To edit the list:

1. Enter or edit the list name and list description.

2. Add parameters to or remove parameters from the list.

- To remove a parameter from a list, check the box next to the parameter name and click **Remove**.

- To add a parameter to a list, click **Add**. Follow the steps in Adding Parameters to a List.

3. To save the list, click **Save.** To distribute the parameters to the registers, click **Save and Distribute**.

Adding Parameters to a List

On the Select Parameter screen, you can add parameters to a new or existing list.

To add parameters to a list:

1. To add parameters to the list, click **Add**. The Select Parameter screen is displayed. See Figure 7–14.

2. Select a group name from the menu and click **Refresh**. The screen displays the parameters for the chosen group.

3. To choose the parameters to add, check the box next to the parameter name and click **Update List**. To add more parameters, select a new group and click **Refresh** to display new parameters.

4. Click **Return to List**. The List Details screen is displayed containing the newly added parameters.

Distributing a Parameter List

Once you have saved a list and chosen to distribute it, the Select Recipient-Registers screen is displayed. You can distribute the list to all the registers or to specific registers.

To send the list to all registers, click **All Registers** and click **Next**. The Job Schedule screen is displayed. Refer to Scheduling a Job to schedule the distribution.

To send the list to specific registers:

1. Click **Individual Registers**.

2. Select a register number from the menu.

3. Click **Add**. The register number appears under "Registers included in distribution." To remove a register, check the box next to the register number and click **Remove**.

4. Click **Next**. The Job Schedule screen is displayed. See Figure 7–3.

   Click **Next**. The Job Schedule screen is displayed.

Viewing Parameter Distributions

You can view parameters scheduled to be distributed to the registers.

To view parameters:

1. Click the **Admin** tab.

2. Select the **Parameter Maintenance** subtab.

3. Click the **Distributions** left navigation link. The Scheduled Exports screen is displayed. This screen shows a list of the export jobs that have been scheduled to run.

4. Edit any of the scheduled distributions. To edit the distribution schedules, see Editing Scheduled Imports and Exports.

Setting Parameters

On the Select Parameters screen, you can view and change parameter values. You may set the parameters that affect both Oracle Retail Back Office and Point-of-Service. To set a parameter, change or enter a new value for that parameter. This consists of choosing a value for each parameter.

To set parameters:

1. Click the **Admin** tab.

2. Click the **Back Office Parameter Maintenance** subtab. The Select Parameters screen is displayed.

Figure 7–14   Select Parameters Screen

3. Select a group from the menu to view the parameters within that group.

4. Click the parameter name link of the parameter you wish to view. The Edit Parameter screen is displayed. See Editing a Parameter.

5. Select another link to view the details of that parameter.

Editing a Parameter

On the Edit Parameter screen, a new value can be selected for the parameter.

Figure 7–15   Edit Parameter Screen

Edit Parameter

Enter a New Value and press Save.   [Save]

	Application Parameters
Parameter Group:	Reconciliation
Parameter Name:	BlindClose
Value:	N
New Value:	N ▾

[Save]

1. Enter or select a new value for the parameter. The edit screen displayed depends on the parameter:

    ▪   If the parameter uses a value field, enter the new value. The minimum and maximum allowed values are displayed on the edit screen.

    ▪   If the parameter uses one value chosen from a list of possible values, select the new value from the list.

    ▪   If the parameter allows more than one value from a list, select a value from the list and click **Add**. Repeat this for each value you want to choose.

    ▪   If the parameter uses a created list, enter the new values separated by commas.

2. Click **Save**. The Select Parameters screen is displayed.

Distributions

Distributions enables you to work with the currently scheduled parameter distribution jobs.

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

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

Maintaining Exchange Rates

On the Foreign Currency Exchange Rates screen, each type of currency is listed with the currency name, ISO, exchange rate, and the date last updated. You may adjust exchange rates for foreign currency.

To adjust exchange rates:

1. Click the **Admin** tab.

2. Click the **Exchange Rate Maintenance** subtab. The Foreign Currency Exchange Rates screen is displayed.

Figure 7–16 Foreign Currency Exchange Rate Screen

Foreign Currency Exchange Rates

Select the appropriate ISO to set foreign currency's exchange rate

Currency	ISO	Exchange Rate	Last Updated
Canadian Dollars	CAD	0.650580	1/1/90
Mexican Pesos	MXN	0.001063	1/1/90
United Kingdom Pounds	GBP	1.777600	12/1/01
Euros	EUR	0.854700	1/1/90
Japanese Yen	JPY	0.009030	12/1/01

3. To change an exchange rate, click the ISO link of the exchange rate. The Set Exchange Rate screen is displayed.

Setting the Exchange Rate

On the Set Exchange Rate screen, the exchange rate for the currency selected on the Foreign Currency Exchange Rate screen can be changed.

Figure 7–17 Set Exchange Rate Screen

Set Exchange Rate

Enter exchange rate for Canadian Dollars.

Exchange Rate : [0.650580] *

[Save]

To set the exchange rate:

1. Enter a new exchange rate as a numerical value.

2. To save the new exchange rate, click **Save**. The new value and the current date are displayed on the Foreign Currency Exchange Rates screen.