

Oracle® Site Hub

User's Guide

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Oracle Site Hub User's Guide, Release 12.1

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Send Us Your Comments

Oracle Site Hub User's Guide, Release 12.1

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Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle Site Hub User's Guide*.

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/us/corporate/accessibility/>

Structure

- 1 Overview of Site Hub**
- 2 Setting Up**
- 3 Role Based Security**
- 4 Site Hub Administrator**
- 5 Site Management**
- 6 Site Hierarchies**
- A Navigator Paths**
- B Custom Hierarchy Page**

Related Information Sources

Integration Repository

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

integration with any system, application, or business partner.

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

Oracle Product Information Management User's Guide

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

Oracle Trading Community Architecture User Guide

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

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

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

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

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

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

Overview of Site Hub

This chapter covers the following topics:

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

Overview of Site Hub

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

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

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

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

Integration with Oracle Applications

Oracle Enterprise Asset Management

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

Oracle Inventory

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

Oracle Property Manager

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

Oracle Trading Community Architecture (TCA)

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

Oracle Universal Content Management (UCM)

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

Overview of Site Hub User Roles

Oracle Site Hub provides two user roles—Administrator and Site User.

The Administrator role workbench pages contain tabbed regions for search and setup of site attributes, location attributes, trade areas and trade area group attributes, hierarchy attributes, mapping preferences, import interface, value sets and functions, and role security.

Administrator Role

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

assignments, and criteria. This enables you to navigate to site records, and view and update information. Additionally you can use conditional qualifiers in searching for attributes.

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

The screenshot shows the Oracle Site Management web application. The top navigation bar includes 'ORACLE Site Management', 'Personalize', 'Diagnostics', and a menu with 'Navigator', 'Favorites', 'Home', 'Logout', 'Preferences', 'Help Page'. Below this is a tabbed interface with 'Sites' selected. The 'Attributes' sub-tab is active, showing a search form and a table of attributes.

Search Section:

Specify parameters and values to filter the data that is displayed in your results set.

☒ Show table data when all conditions are met.
☐ Show table data when any condition is met.

Attribute Group Display Name: is [dropdown] [text field]
Internal Name: is [dropdown] [text field]
Attribute Group Description: is [dropdown] [text field]
Business Entity: is [dropdown] [dropdown]

[Go] [Clear] Add Another [Attribute Group Description dropdown] [Add]

Select Object Section:

Select Object: [Generate Database View] [Delete] [Create]

[Select All](#) | [Select None](#)

Select Display Name	Internal Name	Description	Business Entity	Type	Behavior	Database View	Copy
<input type="checkbox"/> Delivery Points	STOP_DEL_POINTS		Site	Site	Multi-Row		
<input type="checkbox"/> Franchise Information	Franchise_Information		Site	Site	Single-Row		
<input type="checkbox"/> Internal Area	Internal_Area	Internal Square Footage	Site	Site	Single-Row		
<input type="checkbox"/> Mail Box Attributes	MBOX_ATTRIBUTES	Mail Box Attributes	Site	Site	Single-Row		
<input type="checkbox"/> Parking Capacity	Parking_Capacity	Total Parking Capacity	Site	Site	Single-Row		

Site User Role

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

- **Home:** This region has three tabbed areas—My Sites, My Hierarchies, and My Clusters. These regions enable you to access more frequently used records. The records appearing in each region are selected in the Manage pages. See: Overview of Site Management, page 5-1
- **Sites:** Displays the Sites Simple Search page. After displaying the results of your search—you can navigate to pages to manage site, cluster, hierarchy, and template records. See: Searching for Information, page 5-3
- **Hierarchies:** Displays the Hierarchies Simple Search page where you can navigate to pages to view, create, update hierarchy records, and access the Hierarchy Workbench. See: Viewing Site Hierarchies, page 6-2

- Clusters: Displays the Clusters Simple Search page where you can navigate to pages to view, create, and update cluster records. See: Viewing and Creating Site Clusters, page 5-39

The screenshot shows the Oracle Site Management web application. The top navigation bar includes the Oracle logo, 'Site Management' title, and links for Navigator, Favorites, Home, Logout, Preferences, Help, and Diagnostics. Below this is a secondary navigation bar with tabs for Home, Sites, Hierarchies, and Clusters. A search bar is present with a dropdown for 'Name' and a 'Go' button, along with a link to 'Advanced Search'.

The main content area is titled 'Welcome' and contains three sub-tabs: 'My Sites', 'My Hierarchies', and 'My Clusters'. Under 'My Sites', there is a 'Manage My Sites' button and a table of site records.

Number	Name	Purpose	Status	Type	Update
SITE125	SITE125	Bill To	Active	Internal	
MBOX001	MBOX001	Mail Box	Active	Internal	
Retail010	Big Bazaar 004	Retail Show Room	Active	Internal	

Below the site records table is a 'Notifications' section with a table of alerts.

From	Type	Subject	Sent	Due
	Suppliers ASN Creation Notification	ASN sh1237 has been submitted by Allied Manufacturing : Expected Receipt Date is 22-SEP-2009 16:30:24	22-Sep-2009	
	Suppliers ASN Creation Notification	ASN sh1236 has been submitted by Allied Manufacturing : Expected Receipt Date is 22-SEP-2009 16:22:46	22-Sep-2009	
Smith, Jonathan	PO Approval	Standard Purchase Order 5879 has been approved	22-Sep-2009	

Related Topics

Overview of Administrator Role, page 4-2

Searching for Information, page 5-3

Site Attributes, page 4-5

Creating Sites, page 5-15

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

Setting Up

This chapter covers the following topics:

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

Setting Up Oracle Site Hub

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

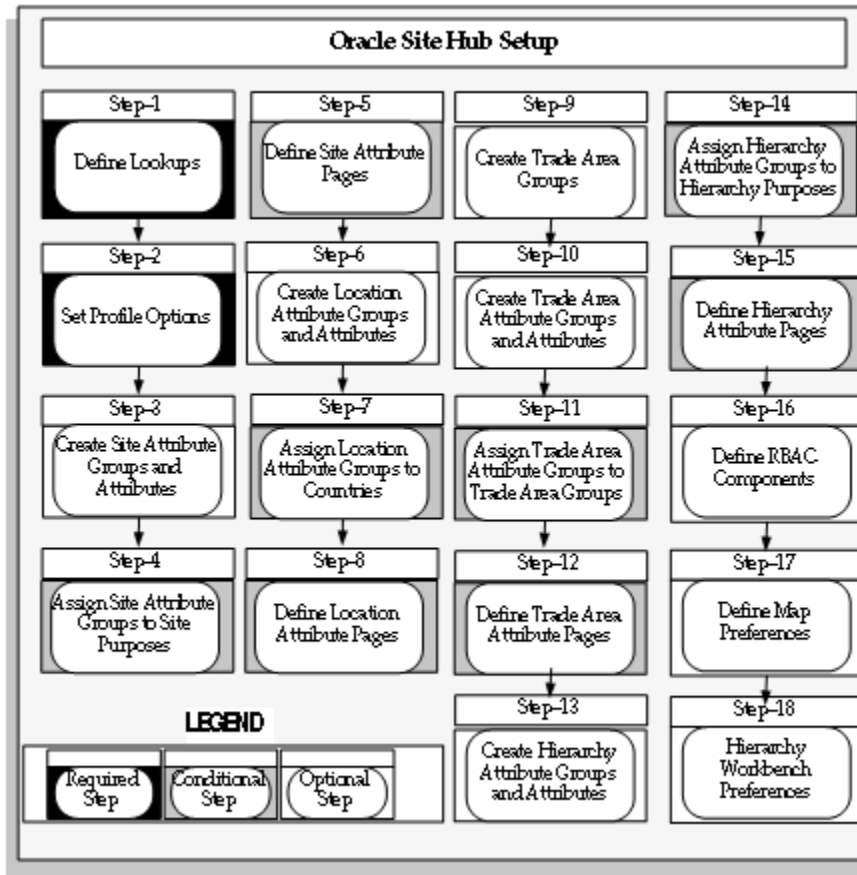
Set Up Underlying Oracle Applications Technology

You need to complete the following setup steps:

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

Site Hub Setup Steps

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



1. Define Lookups (Required)

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

2. Set Profile Options (Required)

Profile options specify how Site Hub controls access and processes data. See: Profile Options, page 2-5

3. Create Site Attribute Groups and Attributes (Optional)

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

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

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

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

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

6. Create Location Attribute Groups and Attributes (Optional)

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

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

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

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

You can create attribute pages to group and categorize location records for ease of data entry and viewing. See: Creating Location Attribute Pages, page 4-26

9. Create Trade Area Groups (Optional)

Trade area groups define trade area regions. You can define any number of trade area groups, and each trade area group can contain up to 5 area groups, for example—primary, secondary and tertiary trade areas. They can be viewed on a map as concentric circles around your sites. See: Viewing and Creating Trade Area Groups, page 4-28

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

Trade area groups are typically used for site selection screening and market analysis. You can define multiple trade area attribute groups and attributes for each of your sites, enabling you to capture demographics using site and location attributes. See: Trade Area Group Attribute Groups, page 4-32

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

Assigning a trade area attribute group to a trade area is used for viewing associated attributes, and required if creating trade area group attribute pages. See: Viewing and Creating Trade Area Group Attribute Assignments, page 4-36

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

You can create attribute pages to group and categorize trade area group records for ease of data entry and viewing. See: Viewing and Creating Trade Area Group Attribute Assignments, page 4-36

13. Create Hierarchy Attribute Groups and Attributes (Optional)

Hierarchies are used for grouping business functions and showing the relationships between sites. You can define multiple hierarchy attribute groups and attributes for each of your hierarchies, enabling you to capture characteristics. See: Viewing, Creating, and Editing Hierarchy Attribute Groups, page 4-38

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

Assigning a hierarchy attribute group to a hierarchy purpose is used for viewing associated attributes, and required if creating hierarchy group attribute pages. See: Viewing and Creating Hierarchy Attribute Assignments, page 4-43

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

You can create attribute pages to group and categorize hierarchy group records for ease of data entry and viewing. See: Creating Hierarchy Attribute Pages, page 4-47

16. Define Role Based Access Components (Optional)

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

17. Define Map Preferences (Optional)

Site Hub offers the ability to view sites on a map using Google Maps. You can set site icons, launch a geocoder program to geocode sites and configure views for visualizing site specific data in Google Maps. See: Defining Site Map Preferences, page 4-60

18. Define Hierarchy Workbench Preferences (Optional)

The Display Settings page is used to upload images as markers for particular hierarchy and site purposes, and associate attribute pages for viewing on the Hierarchy Workbench. This offers a visualization of hierarchies and associated site purposes. See: Viewing and Defining Hierarchy Display Settings, page 4-49

Defining Lookups and Profile Options

Site Hub Lookups

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

Type	Meaning	Usage
RRS_BRAND_NAME	Brand Name	Define brand names to associated sites
RRS_HIERARCHY_PURPOSE	Hierarchy Purpose	Define hierarchy Purpose
RRS_NODE_PURPOSE	Hierarchy Node Purpose	Define hierarchy Node Purpose
PARTY_SITE_USE_CODE	Party Site Code	Define additional site purposes New site purposes are created in the Oracle Receivables Manager responsibility, the Receivables Quickcodes Setup window. Query the Party Site Use Code lookup to evaluate if an existing code can be re-used, or add a new entry.

For more information, see:

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

Profile Options

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

- Yes—you can update the profile option

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

Site Hub Profile Options

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

Profile Option	User	System Admin User	System Admin Resp	System Admin App	System Admin Site	Required ?	Default Value
RRS: Enable Business Events	View Only	Yes	Yes	Yes	Yes	No	Null
RRS: Google Map Client ID	View Only	Yes	Yes	Yes	Yes	No	Null
RRS: Hierarchy UI Custom URL	View Only	Yes	Yes	Yes	Yes	No	Null
RRS: Role Based Security Enabled	No	No	No	No	Yes	No	No
RRS: Trade Area Group Map Layout Type	Yes	Yes	Yes	Yes	Yes	No	Unfilled

Site Hub Profile Option Descriptions

- **CSF:Google Map Key**

You are required to obtain a registration key from Google, Inc. in order to use the Google Map functionality. This profile option is used to enter that value.

- **EGO: Enable exporting to Excel**

This profile is required to be set to Yes to use import and export functionality in Site Hub.

- **RRS:Auto Assign Hierarchy Author Role**

Values are Yes or No. When this profile is set to Yes, the author role for sites created is automatically granted to the user. Auto-assigning of author roles enables users to

have continued update access for other details of the site immediately after its creation.

- **RRS:Auto Assign Site Author Role**

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

- **RRS: Auto Default Site Number**

Enables automatic numbering of the site identification number when creating new sites. This includes site creation using the Create Site: Basic Information page, Web Services, and Excel export and import functions.

- Yes: The Site Number value is defaulted to the next value in the sequence for each new site record. The numbering sequence begins at 10,000.
- No: The Site Number value does not appear automatically for new site records.

- **RRS: Default Geocoding Preference**

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

- System Generated: The Geocoder program uses the address fields entered in the site record to find geodetic coordinates; and the program is automatically launched when the record is saved.
- User Entered: Sites are created with the default value of Geodetic Source as User Entered. The Geocoder program is bypassed and not launched automatically upon site creation. User entered longitude and latitude values are used for mapping purposes.

- **RRS: Enable Business Events**

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

- **RRS: Hierarchy UI Custom URL**

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

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

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

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

Setting Up a Custom Hierarchy Page, page B-1

- **RRS:Google Map Client ID**

The client identification value provided by Google Inc. when you register for the Google Map key. See: google.com/enterprise/

- **RRS: Role Based Security Enabled**

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

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

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

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

Defining Site Map Preferences, page 4-60

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

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

Role Based Security

This chapter covers the following topics:

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

Overview of Role Based Security Access

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

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

Role Based Viewing and Editing Ability

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

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

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

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

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

ORACLE Site Management

Navigator Favorites Home Logout Preferences Help Page Personalize Diagnostics

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments Search Criteria Results Format Import Format

Sites: Attributes >

Attribute Group Details Update

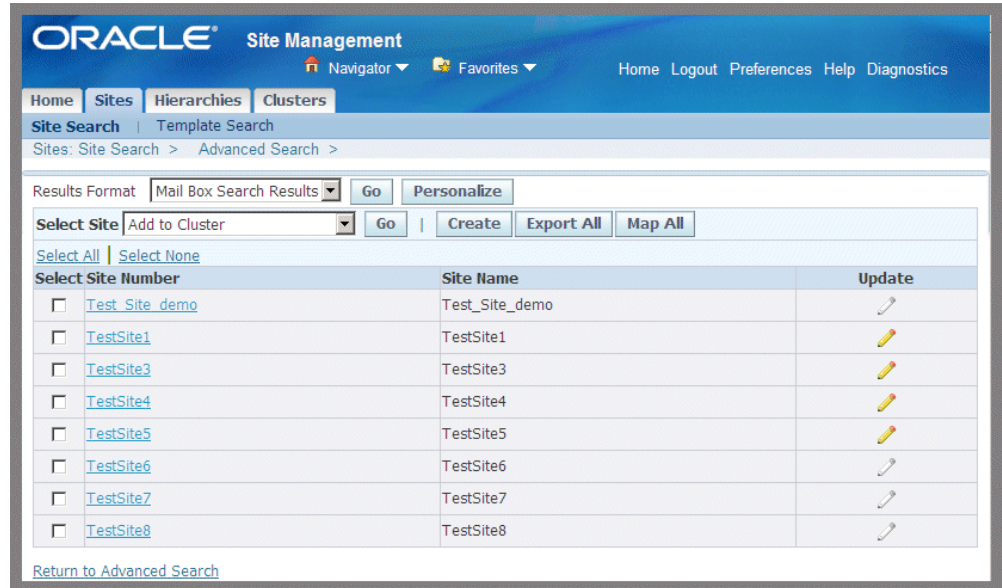
Internal Name TAX_S_SR
 Display Name TAX_S_SR
 Description
 Behavior Single-Row
 Number of columns in the page layout 2

Business Entities

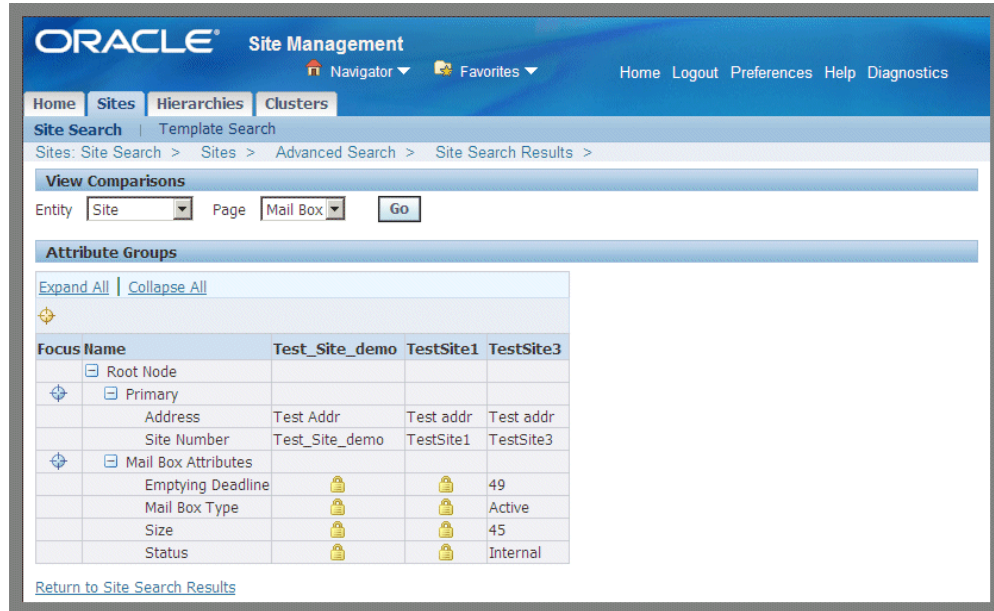
Business Entities		Privilege		Raise Attribute Change Event	
Name	View	Edit	Pre	Post	
Site	VIEW_VALID_AG_PRIV	EDIT_VALID_AG_PRIV	No	No	

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

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



- If Privilege fields are left unassigned for an attribute group, role based security is not enforced for the attributes belonging to the attribute group. All users can view and edit the attribute values of that attribute group.
- If only the edit privilege is assigned and the view privilege is left blank; all users can view attribute values of the attribute group. However, update is restricted to users having edit privileges assigned.
- Attribute fields are visible to users or groups with view privilege for a particular attribute group, otherwise the entire attribute group is hidden to the user. If a user does not have view privilege for any of the attributes on a page, the entire page is not visible to that user.
- When performing Simple and Advanced Search functions, Viewing Comparisons, Site Map displays, and Hierarchy Workbench transactions—attribute fields are visible when users have view privilege for particular attribute groups, otherwise a lock icon appears.

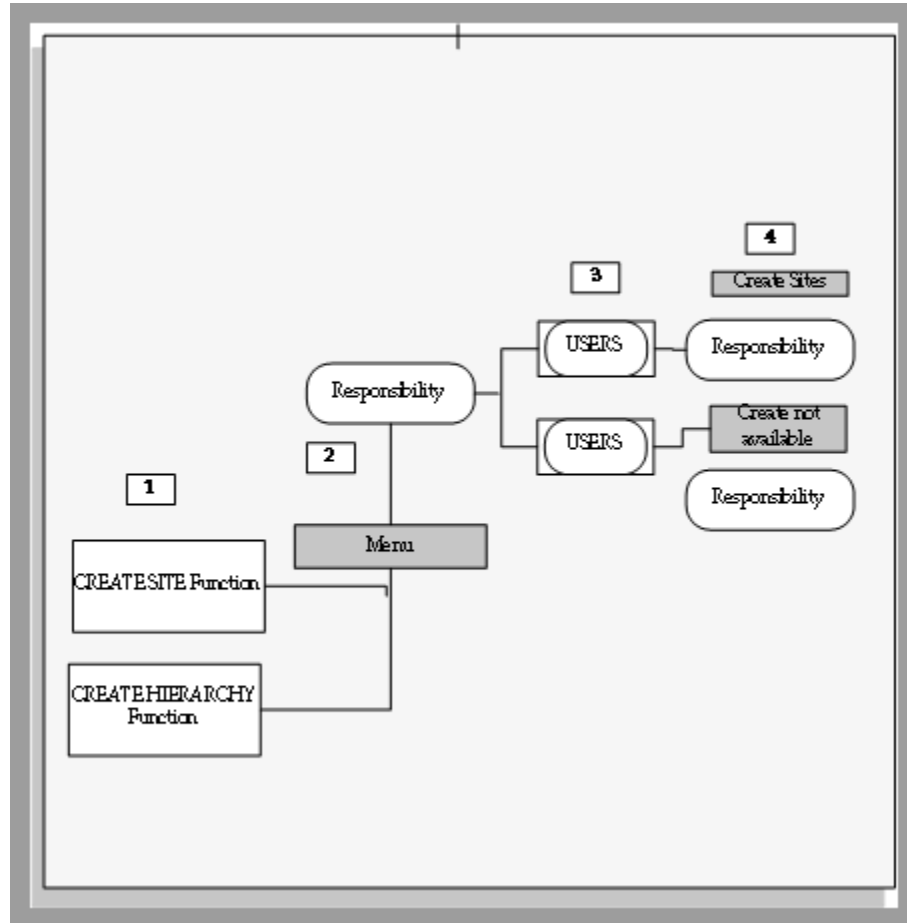


- Users must have view privilege in order to add sites and hierarchies to Favorites records; and to add sites to cluster records.

Setting Up Create Ability

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

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



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

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

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

Role Based Access Behavior in the Hierarchy Workbench

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

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

However, if such a site exists in another hierarchy where the user has view access, that user has the ability to drag the site records from that hierarchy to another hierarchy where they have edit privileges.

- Although, the system does not allow the user to view such site details, you can prevent this behavior by not granting view access to users for specific hierarchies having non-accessible sites to the users.

Related Topics

Setting Up Role Based Access Control, page 3-6

Viewing and Defining User Groups, page 3-10

Viewing and Defining Roles, page 3-13

Viewing and Assigning Roles, page 3-17

Setting Up Role Based Access Control

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

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

Task	Description	Required?
Set Profile Options, page 2-5	<p>Set the following profiles to enable and govern role based access control:</p> <ul style="list-style-type: none"> • RRS: Role Based Security Enabled • RRS:Auto Assign Hierarchy Author Role • RRS:Auto Assign Site Author Role 	Yes
Define Users	<p>Defined in the Users window; individuals are uniquely identified by a username, see:</p> <p><i>Users Window, Oracle E-Business Suite System Administrator's Guide - Security</i></p>	Yes
Define User Groups, page 3-10	You can group multiple users requiring the same access.	No
Set Up Create Functions, page 3-4	You can add or remove create functions from menus associated to responsibilities to control page level security and the menu exclusions.	No
Creating User Defined Privileges, page 3-8	User defined privileges are tailored to control security for interactions in your organization.	No
Define Roles, page 3-10	A role is a collection of privileges assigned to a person or group. Several seeded roles and privileges are provided.	Yes
Assign Roles, page 3-17	Role assignment determines actions a user can perform.	Yes

Roles and Privileges

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

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

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

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

Seeded Roles and Privileges

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

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

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

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

Creating User Defined Privileges

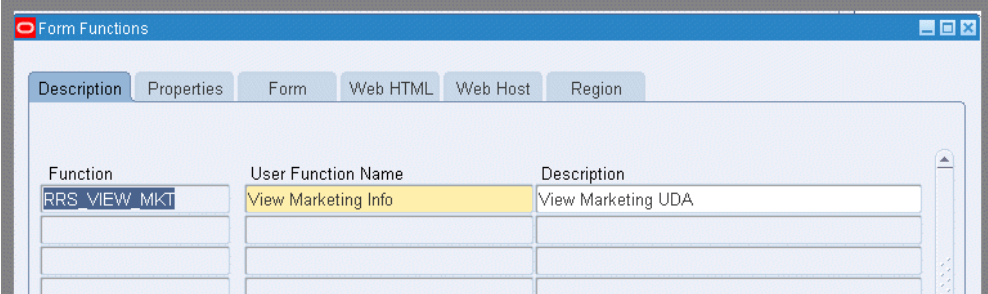
You can create custom roles and user defined privileges to control functional interactions to govern security for attribute groups. If there are multiple attribute groups in a particular page, only those attribute groups you are granted view privilege appear in the page. For example:

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

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

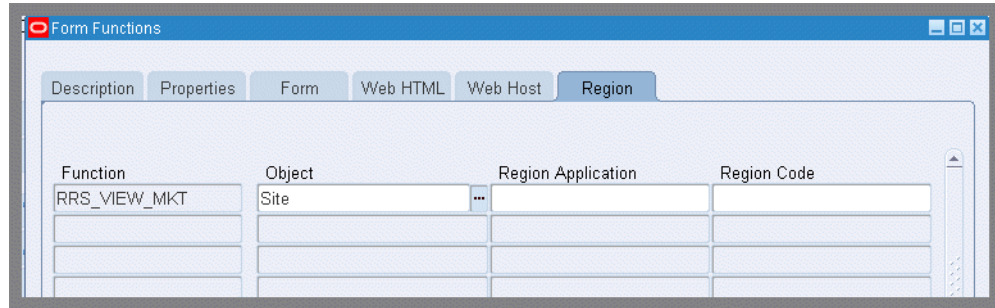
To create user defined privilege for site and hierarchy objects:

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



Function	User Function Name	Description
RRS_VIEW_MKT	View Marketing Info	View Marketing UDA

4. In the Properties tabbed region, select the Subfunction value in the Type field.
5. In the Region tab, select the Site Hub data object for this function. Choices are Site or Hierarchy.



6. Save your work.

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

Viewing and Defining User Groups

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

To search and view role security user groups:

1. Navigate to the Groups page.
2. Enter the full or partial name of the group, and select Go.



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

To create a group:

1. Select Create Group in the Administrative Tools region of the User Groups page.
2. On the Create Group page, enter values in the following fields:
 - Group, the unique name for this role user group for users with similar functions.
 - Description of this group.
 - Group Email Address.

The screenshot shows the Oracle Site Management interface. The top navigation bar includes links for Sites, Locations, Trade Areas, Hierarchies, Map Preferences, Import Interface, Miscellaneous, and Role Security. The 'Role Security' section is active, showing 'User Groups' and 'Role Assignments'. The 'Create Group' form is displayed with the following fields:

- * Indicates required field
- * Group: Financials
- * Description: Accounting Department
- Group Email Address: financials.oracle.com

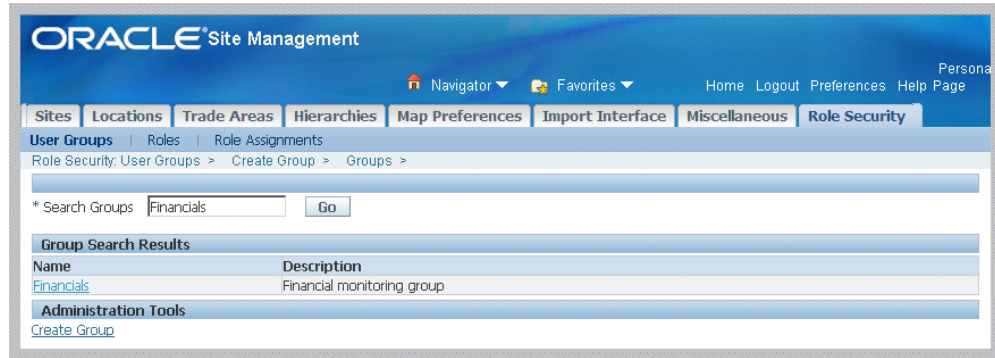
Buttons for 'Cancel' and 'Apply' are located at the bottom right of the form.

3. Save your work.

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

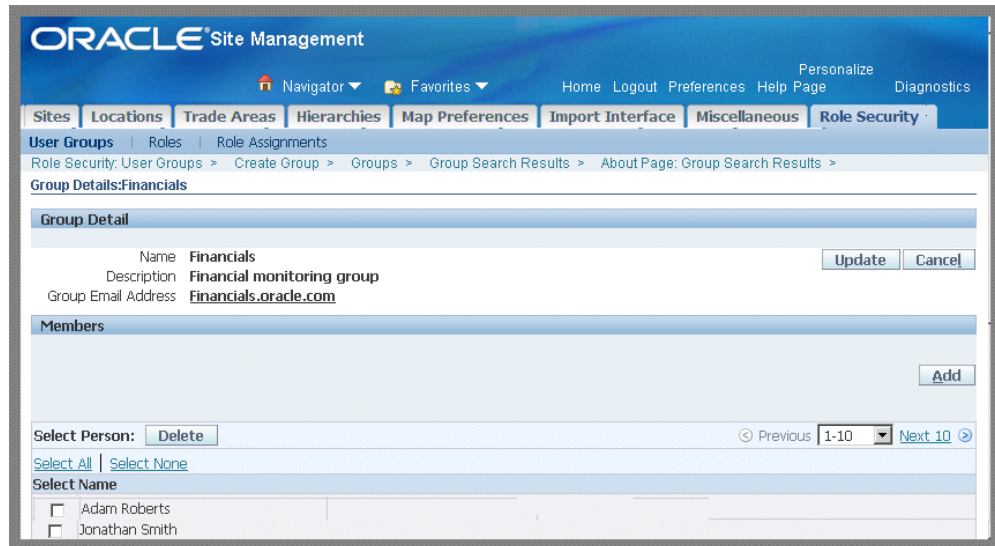
To view and edit group details:

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



The Group Detail page appears and consists of two regions:

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



2. To remove members from the group, select the check box in the Select Name column for members you want to remove, and choose Delete.
3. Select Add to add new users to this group.
4. The Search page appears. Search by entering a word or partial word in the Person or User Name fields, and select Go.

All applicable records fitting your search criteria appear.

ORACLE Site Management

Navigator Favorites Home Logout Preferences Help Page Personalize

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

User Groups Roles Role Assignments

Role Security: User Groups > Group Search Results > Group Details: Financials >

Cancel

Search

Choosing a value for the Person field is a two-step process. First, search for the person. Second, choose the person from the search results and click "Select".

Person

User Name Go

Search Results

Select Person and... Add Previous 1-25 Next 25

Select All Select None

Select Name	Preferred Name	User Name	Email Address	Phone Number
<input type="checkbox"/> A Gupta		AGUPTA		
<input type="checkbox"/> Adam Roberts		AROBERTS		
<input checked="" type="checkbox"/> Admin MFSAdmin		MADMIN		

5. Select the Name records you want to add in the Select check boxes, and choose Add.
6. To edit user group information, on the Group Details page, select Update. The Edit Group page appears.

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

ORACLE Site Management

Navigator Favorites Home Logout Preferences Help Personalize Page Diagnostics

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

User Groups Roles Role Assignments

Role Security: User Groups > Group Search Results > Group Details: Financials >

Edit Group

* Indicates required field

* Group

* Description

Group Email Address

Cancel Apply

7. Select Apply to save your work.

Viewing and Defining Roles

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

To search and view security roles:

1. Navigate to the Roles page and enter the full or partial name of a role in the Search field.
2. Select a value in the Object name field, choices are Site or Hierarchy.

The screenshot shows the Oracle Site Management interface. The top navigation bar includes links for Sites, Locations, Trade Areas, Hierarchies, Map Preferences, Import Interface, Value Sets, Functions, and Role Security. The Role Security section is active, showing a search interface with a search field containing 'H' and a dropdown for Object Name set to 'Hierarchy'. Below the search fields is a table titled 'Roles Search Results' with columns for Role, Description, Object Name, and Last Updated By. The table lists three roles: 'Hierarchy Author', 'Hierarchy UDA Author', and 'hi'. Each role has a radio button for selection and a link in the Last Updated By column. At the bottom, there is an 'Administration Tools' section with a 'Create Role' link.

Select	Role	Description	Object Name	Last Updated By
<input checked="" type="radio"/>	Hierarchy Author		Hierarchy	MFG
<input type="radio"/>	Hierarchy UDA Author	Hierarchy UDA Author	Hierarchy	MFG
<input type="radio"/>	hi	hi	Hierarchy	MFG

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

Note: Only roles without assignments can be deleted.

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

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

ORACLE Site Management

Navigator Favorites Home Logout Preferences Help Page Diagnostics

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

User Groups Roles Role Assignments

Role Security: Roles > Role Search Results >

Person: Jonathan Smith

Name Jonathan Smith
 Title Mr.
 Preferred Name
 Type INTERNAL
 Phone 212-445-3383
 Fax
 Email Address
 Username MFG

Company Details

Company Name Vision Enterprise

[Return to Role Search Results](#)

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

ORACLE Site Management

Navigator Favorites Home Logout Preferences Help Personalize Page Diagnostics

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

User Groups Roles Role Assignments

Role Security: Roles > Role Search Results >

Role Details

Role: Hierarchy Author

Name Hierarchy Author
 Description
 Object Name Hierarchy

Privileges

[Update](#)

Name	Description
View Hierarchy	View Hierarchy Privilege
Edit Hierarchy	Edit Hierarchy Privilege

To create a user role:

1. Select Create Role on the Roles page to display the Create Role page.
2. Select a value in the Object Name field, choices are Site or Hierarchy.

3. Select Next to navigate to the Role Details page.
4. On the Role Details page, enter unique values in the Name and Description fields.
5. In the Create Privileges region, select the privileges allowed for this role in the check box column.

Select Name	Description
<input type="checkbox"/> Edit Site	Edit Site Privilege
<input type="checkbox"/> Edit Site Attribute Groups	
<input type="checkbox"/> QA Site View Accounting Info	
<input checked="" type="checkbox"/> RBAC UDA AG2 View Privilege	RBAC UDA AG2 View Privilege

6. Select Apply to save your work.

To edit a user role:

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

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

ORACLE Site Management

Navigator Favorites Home Logout Preferences Help Page Personalize Diagnostics

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous **Role Security**

User Groups Roles Role Assignments

Role Security: Roles > Role Search Results >

Role Details

Role: Site UDA Author

Name Site UDA Author
Description Site UDA Authors
Object Name Site

Privileges

Name	Description
View Site Attribute Groups	
Edit Site Attribute Groups	

Update

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

ORACLE Site Management

Navigator Favorites Home Logout Preferences Help Personalize Page Diagnostics

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous **Role Security**

User Groups Roles Role Assignments

Role Security: Roles > Role Search Results >

Role Details

Update Role: Financial

* Name Financial
* Description Financial Role
Object Name Site

Update Privileges

Select All | Select None

Select Name	Description
<input type="checkbox"/> EDIT_VALID_AG_PRIV	EDIT_VALID_AG_PRIV
<input checked="" type="checkbox"/> Edit Site	Edit Site Privilege
<input type="checkbox"/> Edit Site Attribute Groups	
<input type="checkbox"/> QA Site View Accounting Info	
<input checked="" type="checkbox"/> RBAC UDA AG2 View Privilege	RBAC UDA AG2 View Privilege
<input type="checkbox"/> RBAC UDA AG3 View Privilege	RBAC UDA AG3 View Privilege
<input type="checkbox"/> VIEW_VALID_AG_PRIV	VIEW_VALID_AG_PRIV
<input type="checkbox"/> View AG100 Privilege	View AG100 Privilege
<input type="checkbox"/> View Site	View Site Privilege
<input type="checkbox"/> View Site Attribute Groups	
<input type="checkbox"/> Edit AG100 Privilege	Edit AG100 Privilege
<input type="checkbox"/> View AG100 Privilege	View AG100 Privilege

Cancel Apply

- Select Apply to save your work.

Viewing and Assigning Roles

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

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

The profile options RRS:Auto Assign Site Author Role and RRS:Auto Assign Hierarchy Author Role are used to grant View and Edit privileges. This profile option is usually set to a value of Yes at Site level, unless there is a need to tightly control View and Edit access of sites. See: Profile Options, page 2-5

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

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

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

To search and view role assignments:

1. Navigate to the Role Assignments page.

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

2. Optionally choose the following values for your search:

- User Type

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

group role which includes the members.

- User Name/Group

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

- Object

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

- Role

You can narrow your search by selecting a specific role.

- Grouping Criteria

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

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

- Data Secured

Values are populated depending on the Grouping Criteria.

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

Select	*User Type	*User Name/Group	*Object	*Role	*Grouping Criteria	Data Secured	Identifier	*Start Date	End Date
<input type="checkbox"/>	User	Webservices Edit	Site	Site Product Manager	Site Purpose	Store		20-Jan-2011	
<input type="checkbox"/>	User	RRS_PRD Gu	Site	Site Product Manager	Site	RGS100	RGS100	13-Jan-2011	

Buttons: Delete, Select All, Select None, Add Another Row, Cancel, Apply

To delete role assignment records:

1. In the Role Assignments region of the Role Assignments page, choose the records you want to remove in the Select check box.
2. Select Delete.
3. Select Apply to save your work.

To assign roles to users or user groups:

1. In the Role Assignments region of the Role Assignments page, select Add Another Row.
2. In the User Type field, choose an individual user or the user group role which includes the members. Values are User or User Group.

Select	*User Type	*User Name/Group	*Object	*Role	*Grouping Criteria	Data Secured	Identifier	*Start Date
<input type="checkbox"/>	User	Webservices Edit	Site	Site Product Manager	Site Purpose	Store		20-Jan-2
<input type="checkbox"/>	User	RRS_PRD Gu	Site	Site Product Manager	Site	RGS100	RGS100	13-Jan-2
<input type="checkbox"/>	User Group	Production Managers	Site					03-Mar-2

Buttons: Delete, Select All, Select None, Add Another Row, Cancel, Apply

3. In the User Name/Group field, if you selected User as the User Type, you have the option to select an individual. If the User Type is a User Group, select a User Group value.
4. Select a data Object, choices are either Hierarchy or Site.
5. Select a value in the Role field.
6. Select a value in the Grouping Criteria field.
 - Seeded values for grouping criteria available for site objects:
 - All Sites—role assignment is applicable to all sites.
 - Site—role assignment is applicable to a specific site.
 - Site Brand
 - Site Type
 - Site Purpose
 - The seeded values for grouping criteria available for hierarchy objects:
 - All Hierarchies
 - Hierarchy
 - Hierarchy Purpose

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

For example:

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

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

8. If this assignment is granted for a definite time period, enter the applicable date range definitions in the Start Date and End Date fields.
9. Select Apply to save your work.

Site Hub Administrator

This chapter covers the following topics:

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

Overview of Administrator Role

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

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

The screenshot displays the Oracle Site Management web application. The top navigation bar includes the Oracle logo, 'Site Management' title, and links for Navigator, Favorites, Home, Logout, Preferences, Help Page, Personalize, and Diagnostics. Below this is a tabbed interface with tabs for Sites, Locations, Trade Areas, Hierarchies, Map Preferences, Import Interface, Miscellaneous, and Role Security. The 'Sites' tab is active, and within it, the 'Attributes' sub-tab is selected. The 'Search' section is visible, featuring a search criteria builder with fields for Attribute Group Display Name, Internal Name, Attribute Group Description, and Business Entity, each with a dropdown menu and a text input field. Below these fields are 'Go', 'Clear', and 'Add Another' buttons. A table below the search section lists attributes with columns for Select, Display Name, Internal Name, Description, Business Entity, Type, Behavior, Database View, and Copy. The table contains five rows of data.

Select	Display Name	Internal Name	Description	Business Entity	Type	Behavior	Database View	Copy
<input type="checkbox"/>	Delivery Points	STOP_DEL_POINTS		Site	Site	Multi-Row		
<input type="checkbox"/>	Franchise Information	Franchise_Information		Site	Site	Single-Row		
<input type="checkbox"/>	Internal Area	Internal_Area	Internal Square Footage	Site	Site	Single-Row		
<input type="checkbox"/>	Mail Box Attributes	MBOX_ATTRIBUTES	Mail Box Attributes	Site	Site	Single-Row		
<input type="checkbox"/>	Parking Capacity	Parking_Capacity	Total Parking Capacity	Site	Site	Single-Row		

The tabbed regions enable you set the following features:

Sites, page 4-5

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

Locations, page 4-20

- View, create, and update location attributes and assignments

Trade Areas, page 4-28

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

Hierarchies, page 4-38

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

Map Preferences, page 4-60

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

Import Interface, page 4-65

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

Miscellaneous for Value Sets, page 4-66 and **Functions**, page 4-68

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

Role Security, page 3-1

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

Site, Location, Trade Area, and Hierarchy Attributes

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

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

features for attributes:

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

Attribute Pages

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

- Sites: Attribute pages can be created for the various site purposes, see: Creating Site Attribute Pages, page 4-16
- Locations: Attribute pages can be created for each country, and you can also assign multiple attribute pages to a specific country, see: Creating Location Attribute Pages, page 4-26
- Trade Areas: Attribute pages can be created for various trade area groups, and you can assign multiple pages to a single trade area group, see: Creating Trade Area Attribute Pages, page 4-37
- Hierarchies: Attribute pages can be created for various hierarchies, and you can assign multiple pages to a single hierarchy attribute group, see: Creating Hierarchy Attribute Pages, page 4-47

Generating Database Views

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

party systems.

To generate database views:

1. Navigate to the Attributes region of the Sites, Locations, or Hierarchies tabbed region of the Administrator.
2. Select the attribute groups you want included in your database view.
3. Select Generate Database View to display the Generate Database View page.
4. You have the option to change the value in the Database View Name field if this attribute group was not included in an existing database view.

ORACLE Site Management

Navigator Favorites Home Logout Preferences Help Diagnostics

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments Search Criteria Results Format Display Settings Relationship Rules

Sites: Attributes >

Generate Database View

* Indicates required field

Cancel Apply

For existing database view you will not be able to update database view name.

Attribute Group	*Database View Name	Existing View
Franchise stores	RRS_FRANCHISE_STORES_AGV	
RG Hierarchy single Row	RRS_RG_H_AG_SR_AGV	
RG Hierarchy single Row	RRS_RG_SR_AG2_AGV	

Cancel Apply

5. Select Apply to save your work.

The new database views appear on the search results table.

Related Topics

Searching for Information, page 5-3

Setting Up Search Functions, page 4-53

Site Attributes, page 4-6

Location Attributes, page 4-20

Viewing and Creating Trade Areas, page 4-28

Site Attributes

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

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

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

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

Viewing, Creating, and Editing Site Attribute Groups

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

To view site attribute group details

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

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

ORACLE Site Management

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Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments Search Criteria Results Format Import Format

Search

Specify parameters and values to filter the data that is displayed in your results set.

☒ Show table data when all conditions are met.
☐ Show table data when any condition is met.

Attribute Group Display Name is
Internal Name is
Attribute Group Description is
Business Entity is

Go Clear Add Another Attribute Group Description Add

Select Object: Generate Database View Delete Create

Select All Select None

Select Display Name	Internal Name	Description	Business Entity	Type	Behavior	Database View	Copy
<input type="checkbox"/> Delivery Points	STOP_DEL_POINTS		Site	Site	Multi-Row		
<input type="checkbox"/> Franchise Information	Franchise_Information		Site	Site	Single-Row		
<input type="checkbox"/> Internal Area	Internal_Area	Internal Square Footage	Site	Site	Single-Row		
<input type="checkbox"/> Mail Box Attributes	MBOX_ATTRIBUTES	Mail Box Attributes	Site	Site	Single-Row		
<input type="checkbox"/> Parking Capacity	Parking_Capacity	Total Parking Capacity	Site	Site	Single-Row		

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

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

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

ORACLE® Site Management Home Logout Preferences Help Diagnostics

Sites | Locations | Trade Areas | Hierarchies | Map Preferences | Import Interface | Miscellaneous | Role Security

Attributes | Assignments | Search Criteria | Results Format | Import Format

Sites: Attributes >

Attribute Group Details Update

Internal Name: ST3_SPECIAL
 Display Name: Special Facilities
 Description: Special Facilities
 Behavior: Single-Row
 Number of columns in the page layout: 3

Business Entities

Name	Privilege		Raise Attribute Change Event	
	View	Edit	Pre	Post
Site				

Attributes Add Attribute

Select Object: Delete

[Select All](#) | [Select None](#)

Select	Sequence	Internal Name	Display Name	Data Type	Display As	Value Set Name	Enabled	Required	Indexed	Column	Edit
<input type="checkbox"/>	10	ST3_ATM	ATM	Char	Checkbox	EGO_YES_NO	Yes	No	No	C_EXT_ATTR1	
<input type="checkbox"/>	20	ST3_PLAY	Children Play Area	Char	Checkbox	EGO_YES_NO	Yes	No	No	C_EXT_ATTR2	

Where Used

Name	Business Entity	Enabled	Display Pages
Retail Show Room	Site	Yes	Customer Info

The Business Entities region lists business events compiled in the Oracle Integration Repository, a tool enabling you to deploy appropriate business service interfaces. See: Oracle Integration Repository at irep.oracle.com.

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

To create an attribute group for a site:

1. Navigate the Sites tabbed region of the Administrator, select Create to display the

Create Attribute Group for Site page.

2. Enter a value in the Internal Name field; and the name you want displayed on the page in the Display Name field. The Internal Name value cannot be updated once a record has been created.
3. Optionally in the Description field, you can enter a description of the attribute category.

ORACLE Site Management

Home Logout Preferences Help Personalize Page

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Sec

Attributes Assignments Search Criteria Results Format Import Format

Sites: Attributes >

Create Attribute Group for Site

* Indicates required field

* Internal Name

* Display Name

Description

Behavior

* Number of columns in the page layout

Business Entities

Select All Select None

Select	Name	View	Privilege	Edit	Raise Attribute Change Event
					Pre Post
<input checked="" type="checkbox"/>	Site	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> <input type="checkbox"/>

Cancel Apply and Add Attributes Apply

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

The Business Entities region lists business events compiled in the Oracle Integration Repository, a tool enabling you to deploy appropriate business service interfaces. See: Oracle Integration Repository irep.oracle.com.

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

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

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

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

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

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

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

4. Select Apply to save your work.

To edit a site attribute group record:

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

ORACLE Site Management

Home Logout Preferences Help Personalize Page

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role

Attributes Assignments Search Criteria Results Format Import Format

Sites: Attributes > Attribute Group Details >

Edit Attribute Group for Site

* Indicates required field

Internal Name **FRANCHISEE**

* Display Name **Franchisee Details**

Description **Franchisee Information**

Behavior **Multi-Row**

* Number of columns shown in the table

* Number of rows shown in the table

Business Entities

[Select All](#) | [Select None](#)

Select	Name	View	Privilege	Edit	Raise Attribute Change Event
					Pre Post
<input checked="" type="checkbox"/>	Site	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> <input type="checkbox"/>

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

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

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

The Business Entities region lists business events compiled in the Oracle Integration Repository, a tool enabling you to deploy appropriate business service interfaces. See: Oracle Integration Repository at irep.oracle.com.

4. Select Apply to save your work.

Related Topics

Searching for Information, page 5-3

Setting Up Search Functions, page 4-53

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

Copying Attribute Groups, page 5-37

Creating Attributes, page 4-18

Viewing and Creating Site Attribute Assignments

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

See: Site Attributes, page 4-5

To add attribute groups to site purpose:

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

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

Assignments

* Indicates required field

* Purpose Distribution Center Go

Attribute Groups Attribute Pages

Attribute Groups

View Attribute Groups For Site

Search

Search By Display Name Go

Add Attribute Groups

Select Attribute Groups: Delete

[Select All](#) | [Select None](#)

Select	Display Name	Description	Data Level	Classification	Pages	Update Actions
<input type="checkbox"/>	Staff Info		Site	Distribution Center		
<input type="checkbox"/>	Receiving Hours		Site	Distribution Center	Distribution Center	
<input type="checkbox"/>	Manager		Site	Distribution Center		
<input type="checkbox"/>	Facilities	Additional facilities	Site	Distribution Center		

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

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

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

ORACLE® Site Management

Home Logout Preferences Help Personalize Page

Sites | **Locations** | **Trade Areas** | **Hierarchies** | **Map Preferences** | **Import Interface** | **Miscellaneous** | **Role Secu**

Attributes | **Assignments** | Search Criteria | Results Format | Import Format

Sites: Assignments >

Add Attribute Groups to Site Purpose

Specify parameters and values to filter the data that is displayed in your results set.

☒ Show table data when all conditions are met.
☐ Show table data when any condition is met.

Display Name is
Description is
Internal Name is
Behavior is

Add Another

[Select All](#) | [Select None](#)

Select	Display Name ▲	Internal Name	Description	Business Entity	Behavior	Attribute Group Type
<input checked="" type="checkbox"/>	Manager	MANAGER		Site	Single-Row	Site
<input type="checkbox"/>	MileStone	CT2_MS		Site	Multi-Row	Site
<input type="checkbox"/>	Selling Hours	cb_selling_hrs		Site	Multi-Row	Site
<input checked="" type="checkbox"/>	Staff Info	CT2_Staff		Site	Single-Row	Site
<input type="checkbox"/>	Supplier	SUPPLIER		Site	Multi-Row	Site

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

To view and update site attribute group assignments:

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

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

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

ORACLE® Site Management

Home Logout Preferences Help Diagnostics

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments Search Criteria Results Format Import Format

Assignments

* Indicates required field

* Purpose Retail Show Room Go

Attribute Groups Attribute Pages

Attribute Groups

View Attribute Groups For Site

Search

Search By Display Name Go

Add Attribute Groups

Select Attribute Groups: Delete

Select All Select None

Select Display Name	Description	Data Level	Classification	Pages	Update Actions
<input type="checkbox"/> Operating Hours	Site Operating hours	Site	Retail Show Room	Customer Info	
<input type="checkbox"/> Management	Management Staffs	Site	Retail Show Room	Management Info	
<input type="checkbox"/> Special Facilities	Special Facilities	Site	Retail Show Room	Customer Info	
<input type="checkbox"/> Staffs		Site	Retail Show Room	Management Info	
<input type="checkbox"/> Hours of Operation	Hours of Operation	Site	Retail Show Room	Retail Show Room Page	

3. Select Add Attribute Groups if you want to add attributes to specific site purpose records. See: Viewing and Creating Site Attribute Assignments, page 4-12
4. Select Update Action to navigate to the Actions page. See: Adding Actions to an Attribute Group, *Oracle Product Information Management Implementation Guide*

ORACLE Site Management

Home Logout Preferences Help Diagnostics

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments Search Criteria Results Format Import Format

Assignments

* Indicates required field

* Purpose: Retail Show Room Go

Attribute Groups Attribute Pages

Pages

View Attribute Groups For: Site

Search

Search By: Display Name Go

Create Page

Select Item Pages: Delete

Select All Select None

Select Sequence	Display Name	Internal Name	Description	Classification
<input type="checkbox"/> 1	Retail Show Room Page	RETAIL_PAGE	Retail Show Room Page	Retail Show Room
<input type="checkbox"/> 10	Customer Info	ST3_CUSTOMER		Retail Show Room
<input type="checkbox"/> 20	Management Info	ST3_MANAGEMENT		Retail Show Room

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

Creating Site Attribute Pages

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

To create site attribute pages:

1. In the Sites tabbed region of the Administrator, select Assignments.
2. Select a value in the Site Purpose field, and select Go.

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Home Logout Preferences Help Personalize Page

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments Search Criteria Results Format Import Format

Assignments

* Indicates required field

* Purpose Store Go

Attribute Groups Attribute Pages

Pages

View Attribute Groups For Site

Search

Search By Display Name Go

Create Page

Select Item Pages: Delete

Select All Select None

Select	Sequence	Display Name	Internal Name	Description	Classification
<input type="checkbox"/>	10	Store Page	cb_store		Store
<input type="checkbox"/>	22	Site Page	RRS_PAGE	RRS Site Page	Store

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

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Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments Search Criteria Results Format Import Format

Sites: Assignments >

Create Site Page

* Indicates required field

Basic Information

* Display Name Capacity Internal Name Capacity

Description Capacity of the site sales * Sequence 30

Business Entity Site

Attribute Groups

Select	*Sequence	*Display Name	Description
	No results found.		

Add Another Row

Cancel Apply

4. In the Create Site Page region, create an attribute page for the site purpose by entering data in the Basic Information region:
 - Display Name—name displayed on the page
 - Description—a description of the attribute category

- Internal Name—internal name for the page, this value cannot be updated once a page has been created
 - Sequence—sequence number for each page associated with an attribute group, the sequence number determines the order pages are listed
5. In the Attribute Groups region, select Add Another Row to add attributes groups to this page. To add an existing attribute group:
 - Enter a Sequence number
 - Select an existing Display Name value
 6. Select Apply to save your work.

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

Creating Attributes

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

To create an attribute:

1. Navigate to the Create Attribute page.

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

ORACLE Site Management

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Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Sec

Attributes | Assignments | Search Criteria | Results Format | Import Format

Sites: Attributes > Create Attribute Group >

Create Attribute

* Indicates required field

* Internal Name

* Display Name

* Sequence

Tip

Data Type Char

* Column

☒ Enabled

☐ Required

Display as Text Field

☐ Indexed

Value Set

Value Set Name

Default Value

Default Value

Apply and Add Another

Cancel Apply

2. Enter values in the required fields:

- Internal Name—internal name for the page, this value cannot be updated once a page has been created
- Display Name—name displayed on the page
- Sequence—number used to determine the order listed of the attribute when creating attribute pages

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

4. Select a value in the Data Type field.

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

5. Select a value in the Column field.

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

the value selected in the Data Type field.

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

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

Location Attributes

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

Viewing, Creating, and Editing Location Attribute Groups

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

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

To view location attribute group details

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

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

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

The screenshot shows the Oracle Site Management interface. The top navigation bar includes links for Home, Logout, Preferences, Help, and Diagnostics. Below this is a tabbed menu with 'Locations' selected. The 'Search' section allows filtering by Attribute Group Display Name, Internal Name, Attribute Group Description, and Business Entity. The results table lists three records: LVLOC1, Parking, and Weather.

Select Display Name	Internal Name	Description	Business Entity	Type	Behavior	Database View	Copy
<input type="checkbox"/> LVLOC1	LVLOC1	LVLOC1	Location	Site Location	Single-Row		
<input type="checkbox"/> Parking	ST3_PARKING		Location	Site Location	Single-Row		
<input type="checkbox"/> Weather	ST3_Weather		Location	Site Location	Multi-Row		

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

ORACLE® Site Management Home Logout Preferences Help Diagnostics

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes | Assignments

Locations: Attributes >

Attribute Group Details Update

Internal Name LVLOC1
 Display Name LVLOC1
 Description LVLOC1
 Behavior Single-Row
 Number of columns in the page layout 2

Business Entities

Name	Privilege		Raise Attribute Change Event	
	View	Edit	Pre	Post
Location				

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

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

Attributes Add Attribute

Select Object: Delete

[Select All](#) | [Select None](#)

Select Sequence	Internal Name	Display Name	Data Type	Display As	Value Set Name	Enabled	Required	Indexed	Column	Edit
<input type="checkbox"/> 10	LVAG3	LVAG3	Char	Text Field		Yes	No	No	C_EXT_ATTR1	
<input type="checkbox"/> 20	LVAG3A1	LVAG3A1	Char	Text Field		Yes	No	No	C_EXT_ATTR2	

Where Used

Name	Business Entity	Enabled	Display Pages
United States	Location	Yes	LVPAGE4

3. This page enables you to select:

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

To create an attribute group for a location

1. Navigate the Locations tabbed region of the Administrator, select Create to display the Create Attribute Group for Location page.
2. Enter a value in the Internal Name field; and the name you want displayed on the page in the Display Name field. The Internal Name value cannot be updated once a record has been created.
3. Optionally in the Description field, you can enter a description of the attribute category.
4. Select a value in the Behavior field:
 - Single-Row associates one attribute value with each attribute
 - Multi-Row associates multiple sets of attribute values with the same attribute
5. Enter a value in the Number of columns in the page layout. This is the number of columns to appear in the attribute group pages. The default value is 2.
6. If you selected Multi-Row a the value in the Behavior field, you can select a value in the Number of rows in the page layout field. This is the number of rows to appear in the attribute group pages. The default value is 5.

The Business Entities region lists business events compiled in the Oracle Integration Repository, a tool enabling you to deploy appropriate business service interfaces. See: Oracle Integration Repository at irep.oracle.com.
7. Select Apply to save your work. Or select Apply And Add Attributes to save and add attributes to this record. See: Creating Attributes, page 4-18

To create a location attribute group by copying an existing record

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

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

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

To edit a location attribute group record

1. Navigate to the Edit Attribute Groups for Site Location page.
2. You have the option to update the following fields.

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

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

ORACLE Site Management

Home Logout Preferences Help Personalize Page

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes | Assignments | Search Criteria | Results Format | Import Format

Locations: Attributes > Attribute Group Details >

Edit Attribute Group for Site Location

* Indicates required field

Internal Name CT2_WEATHER

* Display Name Weather

Description Weather conditions in loc

Behavior Multi-Row

* Number of columns shown in the table 3

* Number of rows shown in the table 5

Business Entities

Select All | Select None

Select Name	View	Privilege	Edit	Raise Attribute Change Event	
				Pre	Post
<input checked="" type="checkbox"/> Location	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Cancel Apply

The Business Entities region lists business events compiled in the Oracle Integration Repository, a tool enabling you to deploy appropriate business service interfaces. See: Oracle Integration Repository at irep.oracle.com.

3. Select Apply to save your work.

Viewing and Creating Location Attribute Assignments

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

See: Location Attributes, page 4-20

To add attribute groups to a country location:

1. In the Locations tabbed region of the Administrator, select Assignments to display the Assignments page.
2. Choose a value in the Country field, and select Go.

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

ORACLE Site Management

Home Logout Preferences Help Diagnostics

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments

Assignments

* Indicates required field

* Country France Go

Attribute Groups Attribute Pages

Attribute Groups

View Attribute Groups For Location

Search

Search By Display Name Go

Add Attribute Groups

Select Display Name	Description	Data Level	Classification	Pages	Update Actions
No results found.					

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

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

4. In the results region, select the records you want to this country.
5. Select Apply. The new records appear on the Assignments page.

To view and update location attribute assignments:

1. In the Locations tabbed region of the Administrator, select Assignments to display the Assignments page.
2. Choose a value in the Country field, and select Go to display the attribute assignments for that country location.

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

ORACLE® Site Management

Home Logout Preferences Help Personalize Page Diagnostics

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments Search Criteria Results Format Import Format

Locations: Assignments >

Assignments

* Indicates required field

* Country: United States Go

Attribute Groups Attribute Pages

Attribute Groups

View Attribute Groups For Location

Search

Search By: Display Name Go

Add Attribute Groups

Select Attribute Groups: Delete

Select All | Select None

Select Display Name	Description	Data Level	Classification	Pages	Update Actions
<input type="checkbox"/> Weather locations	Location	United States			

3. Select Add Attribute Groups if you want to add attributes to specific country records.
4. Select a record to display the Attribute Group Details page. See: Location Attributes, page 4-20
5. Select Update Actions to navigate to the Actions page, see: Adding Actions to an Attribute Group, *Oracle Product Information Management Implementation Guide*

Creating Location Attribute Pages

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

To create location attribute pages

1. Navigate to Assignments in the Locations tabbed region of the Administrator.
2. Select a value in the Country field, and select Go.

The screenshot shows the Oracle Site Management interface. The top navigation bar includes links for Home, Logout, Preferences, Help, and Personalize Page. The main navigation tabs are Sites, Locations, Trade Areas, Hierarchies, Map Preferences, Import Interface, Miscellaneous, and Role Security. The Assignments section is active, showing a form for creating or managing attribute pages. The Country dropdown is set to 'United States' and the Go button is visible. The Attribute Pages tab is selected, and the Create Page button is visible in the top right of the page region.

Select Sequence	Display Name	Internal Name	Description	Classification
<input type="checkbox"/> 10	Climate Info	CT2_CLIMATE		United States

3. Select the Attribute Pages tab, and in the Pages region select Create Page.
4. In the Create Country Page, create an attribute page for the location by entering data in the Basic Information region:
 - Display Name—name displayed on the page.
 - Description—a description of the attribute category.
 - Internal Name—internal name for the page, this value cannot be updated once a page has been created.
 - Sequence—sequence number for each page associated with an attribute group, the sequence number determines the order on the pages.

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Home Logout Preferences Help Personalize Page

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes | **Assignments**

Locations: Assignments >

Create Country Page

* Indicates required field

Basic Information

* Display Name: City Sectors * Internal Name: Sector
 Description: Sections on the city grid * Sequence: 30
 Business Entity: Location

Attribute Groups

Select	*Sequence	*Display Name	Description
No results found.			
Add Another Row			

Cancel Apply

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

Viewing and Creating Trade Area Groups

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

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

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

To view trade area groups:

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

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

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Home Logout Preferences Help Diagnostics					
Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security					
Trade Area Groups Attributes Assignments					
Trade Area Groups					
Create					
Name	Description	Type	Areas	Status	Update
Education	Education	Donut	3	Active	
Employment		Radii	2	Active	
LRTAG1	LR Trade Area Group 1	Radii	3	Active	
LVTAG		Radii	5	Active	
LVTAGD1	LVTAGD1	Donut	4	Active	
Marketing	Marketing	Radii	3	Active	

This page enables you to select:

- Create to create a new record
 - A name record to navigate to the View Trade Area Group detail page
 - Update to edit information
2. Select a trade area group record to display the View Trade Area Group detail page.

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

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Sites | **Locations** | **Trade Areas** | **Hierarchies** | **Map Preferences** | **Import Interface** | **Miscellaneous** | **Role Security**

Trade Area Groups | **Attributes** | **Assignments**

Trade Areas: Trade Area Groups >

View Trade Area Group: Marketing

* Indicates required field

Basic Information			
Name	Marketing	Number of Trade Areas	3
Status	Active	Type	Radii
Description	Marketing	Unit of Measure	Kilometer

Trade Area Details			
Trade Area	Name	Minimum Radius	*Maximum Radius
1	One	0	10
2	Two	0	25
3	Three	0	50

[Return to Trade Area Groups](#)

To create a trade area group record:

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

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

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Sites Locations **Trade Areas** Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Trade Area Groups | Attributes | Assignments

Trade Areas: Trade Area Groups >

Create Trade Area Group

* Indicates required field

Cancel Apply

Basic Information

* Name Warehouse Number of Trade Areas 3
 Status Active Type Radii
 Description Unit of Measure Kilometer

Trade Area Details

Trade Area	Name	Minimum Radius	*Maximum Radius
1	One	0	
2	Two	0	
3	Three	0	

Cancel Apply

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

To update a trade area group:

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

Administrator, and choose Update.

The Update Trade Area Group page appears.

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

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

The screenshot shows the Oracle Site Management interface. The top navigation bar includes links for Home, Logout, Preferences, Help, and Diagnostics. Below this is a tabbed menu with 'Trade Area Groups' selected. The page title is 'Update Trade Area Group: Education'. A note indicates that an asterisk (*) denotes a required field. The 'Basic Information' section contains fields for Name (Education), Status (Active), Description (Education), Number of Trade Areas (3), Type (Donut), and Unit of Measure (Kilometer). The 'Trade Area Details' section contains a table with three trade areas.

Trade Area	Name	Minimum Radius	*Maximum Radius
1	One	0	1
2	Two	1	3
3	Three	3	5

3. Select Apply to save your work.

Trade Area Group Attribute Groups

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

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

Viewing, Creating, and Editing Trade Area Group Attribute Groups

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

To view trade area group attribute group details:

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

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

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Trade Area Groups Attributes Assignments

Trade Areas: Attributes >

Attribute Group Details

Internal Name: trade_housing_info
Display Name: Housing Information
Description: Housing Information
Behavior: Single-Row
Number of columns in the page layout: 2

Update

Business Entities

Name	View	Edit	Pre	Post
Trade Area				

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

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

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

Attributes

Add Attribute

Select Object: Delete

Select All | Select None

Select	Sequence	Internal Name	Display Name	Data Type	Display As	Value Set Name	Enabled	Required	Indexed	Column	Edit
<input type="checkbox"/>	10	site_house_units	Total Units	Number	Text Field		Yes	No	No	N_EXT_ATTR1	
<input type="checkbox"/>	20	site_house_owned	Total Owner Occupied Units	Number	Text Field		Yes	No	No	N_EXT_ATTR2	
<input type="checkbox"/>	30	site_house_vacant	Total Vacant Units	Number	Text Field		Yes	No	No	N_EXT_ATTR3	

Where Used

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

The Business Entities region lists business events compiled in the Oracle Integration Repository, a tool enabling you to deploy appropriate business service interfaces. See: Oracle Integration Repository at irep.oracle.com.

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

To create an attribute group for a trade area group:

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

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

The Business Entities region lists business events compiled in the Oracle Integration Repository, a tool enabling you to deploy appropriate business service interfaces. See: Oracle Integration Repository at irep.oracle.com.
 7. Select Apply to save your work. Or select Apply And Add Attributes to save and add attributes to this record. See: Creating Attributes, page 4-18

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

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

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

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

To edit a trade area attribute group record:

1. Select an attribute group record to navigate to the Attribute Group Details page.
2. Select Update to display the Edit Attribute Group for Trade Area page.
3. You have the option to change the values in the following fields:

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

- Display Name

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

The Business Entities region lists business events compiled in the Oracle Integration Repository, a tool enabling you to deploy appropriate business service interfaces. See: Oracle Integration Repository at irep.oracle.com.

4. Select Apply to save your work.

Viewing and Creating Trade Area Group Attribute Assignments

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

Assign trade area attribute groups to trade area groups:

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

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

4. In the results region, select the records you want to add to this trade area group. Select Apply. The new records appear on the Assignments page.

To view and update trade area attribute group assignments:

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

display the Assignments page.

2. Choose a value in the Trade Area Group field, and select Go to display the attribute assignments for that purpose.
3. In the Attribute Groups tabbed region, select Add Attribute Groups if you want to add attributes to specific trade area group records.
4. Select a record to display the Attribute Group Details page. See: Trade Area Group Attribute Groups, page 4-32
5. Select Update Actions to navigate to the Actions page, see: Adding Actions to an Attribute Group, *Oracle Product Information Management Implementation Guide*

Creating Trade Area Group Attribute Pages

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

To create trade area group attribute pages

1. In the Trade Area tabbed region of the Administrator, navigate to the Assignments region.
2. Select a value in the Trade Area Group field, and select Go.
3. Select the Attribute Pages tab, and in the Pages region select Create Page.
4. In the Create Trade Area Page, create an attribute page for the trade area by entering data in the Basic Information region:
 - Display Name—name displayed on the page
 - Description—a description of the attribute category
 - Internal Name—internal name for the page
 - Sequence—sequence number for each page associated with an attribute group, the sequence number determines the order of the pages
5. Select the Attribute Groups tabbed region, and select Add Another Row to add attributes groups to this page. To add an existing attribute group:
 - Enter a Sequence number
 - Select an existing Display Name value

6. Select Apply to save your work.

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

Hierarchy Attributes

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

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

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

Viewing, Creating, and Editing Hierarchy Attribute Groups

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

To view hierarchy attribute group details

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

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

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Attributes Assignments Search Criteria Results Format Display Settings Relationship Rules

Search

☒ Show table data when all conditions are met.
☐ Show table data when any condition is met.

Attribute Group Display Name is
 Internal Name is
 Attribute Group Description is
 Business Entity is

Go Clear Add Another Attribute Group Description Add

Select Object: Generate Database View Delete Create

Select All Select None

Select	Display Name	Internal Name	Description	Business Entity	Type	Behavior	Database View	Copy
<input type="checkbox"/>	RG_SR_AG1	RG_SR_AG1	RG_SR_AG1	Hierarchy	Hierarchy	Single-Row		
<input type="checkbox"/>	WS_H_AG_MR	WS_H_AG_MR	WS_H_AG_MR	Hierarchy	Hierarchy	Multi-Row	RRS_WS_H_AG_MR_AGV	
<input type="checkbox"/>	WS_H_AG_MR_VS	WS_H_AG_MR_VS	WS_H_AG_MR_VS	Hierarchy	Hierarchy	Multi-Row		
<input type="checkbox"/>	WS_H_AG_SR	WS_H_AG_SR	WS_H_AG_SR	Hierarchy	Hierarchy	Single-Row		
<input type="checkbox"/>	WS_H_AG_SR_VS	WS_H_AG_SR_VS	WS_H_AG_SR_VS	Hierarchy	Hierarchy	Single-Row		

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

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

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

The Business Entities region lists business events compiled in the Oracle Integration Repository, a tool enabling you to deploy appropriate business service interfaces. See: Oracle Integration Repository at irep.oracle.com.

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Hierarchies: Attributes >

Attribute Group Details

Update

Internal NameRG_SR_AG2

Display NameRG Hierarchy single Row

DescriptionRG_SR_AG2

BehaviorSingle-Row

Number of columns in the page layout2

Business Entities

Business Entities

Name	Privilege		Raise Attribute Change Event	
	View	Edit	Pre	Post
Hierarchy			No	No

Attributes

Add Attribute

Select Object:

Delete

Select All

Select None

Select	Sequence	Internal Name	Display Name	Data Type	As	Value Set Name	Enabled	Required	Indexed	Column	Edit
<input type="checkbox"/>	10	RP_H_CHAR1	RP Hierarchy Char1	Char	Text Field		Yes	Yes	Yes	C_EXT_ATTR10	
<input type="checkbox"/>	20	RP_H_NUM1	RP Hierarchy Num1	Number	Text Field		Yes	No	Yes	N_EXT_ATTR10	
<input type="checkbox"/>	40	RP_H_DATE1	RP Hierarchy Date1	Standard Date	Text Field		Yes	No	No	D_EXT_ATTR2	

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

To create an attribute group for a hierarchy:

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

The screenshot shows the Oracle Site Management interface. The top navigation bar includes 'Sites', 'Locations', 'Trade Areas', 'Hierarchies', 'Map Preferences', 'Import Interface', 'Miscellaneous', and 'Role Security'. The 'Hierarchies' tab is active, and the 'Create Attribute Group for Hierarchy' form is displayed. The form includes fields for 'Internal Name' (Franchise_stores), 'Display Name' (Franchise stores), 'Description' (Stores in mall localtions), 'Behavior' (Single-Row), and 'Number of columns in the page layout' (2). Below these fields is a 'Business Entities' section with a table for selecting entities and their privileges.

Business Entities		Privilege		Raise Attribute Change Event	
Select Name	View	Edit	Pre	Post	
<input checked="" type="checkbox"/> Hierarchy			<input type="checkbox"/>	<input type="checkbox"/>	

Buttons at the bottom: Cancel, Apply and Add Attributes, Apply.

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

The Business Entities region lists business events compiled in the Oracle Integration Repository, a tool enabling you to deploy appropriate business service interfaces. See: Oracle Integration Repository at irep.oracle.com.

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

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

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

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

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

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

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

4. Select Apply to save your work.

To edit a hierarchy attribute group record:

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

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Attributes Assignments Search Criteria Results Format Display Settings Relationship Rules

Hierarchies: Attributes >

Edit Attribute Group for Hierarchy

* Indicates required field

Internal Name Franchise_stores

* Display Name Franchise stores

Description Stores in mall locaitons

Behavior Single-Row

* Number of columns in the page layout 2

Business Entities

Select All Select None

Select Name	View	Privilege	Raise Attribute Change Event	
		Edit	Pre	Post
<input checked="" type="checkbox"/> Hierarchy			<input type="checkbox"/>	<input type="checkbox"/>

Cancel Apply

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

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

- Display Name

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

The Business Entities region lists business events compiled in the Oracle Integration Repository, a tool enabling you to deploy appropriate business service interfaces. See: Oracle Integration Repository at irep.oracle.com.

4. Select Apply to save your work.

Related Topics

Searching for Information, page 5-3

Setting Up Search Functions, page 4-53

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

Copying Attribute Groups, page 5-37

Creating Attributes, page 4-18

Viewing and Creating Hierarchy Attribute Assignments

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

See: Hierarchy Attributes, page 4-38

To add attribute groups to a hierarchy purpose:

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

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

table.

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* Indicates required field

* Purpose

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View Attribute Groups For

Hierarchy

Search

Search By

Display Name

Go

Add Attribute Groups

Select Attribute Groups:

Delete

Select All

Select None

Select	Display Name	Description	Data Level	Classification	Pages	Update Actions
<input type="checkbox"/>	WS_H_AG_SR	WS_H_AG_SR	Hierarchy	Route1	WS_H_PA1	
<input type="checkbox"/>	WS_H_AG_MR_VS	WS_H_AG_MR_VS	Hierarchy	Route1	WS_H_PA2	
<input type="checkbox"/>	WS_H_AG_SR_VS	WS_H_AG_SR_VS	Hierarchy	Route1	WS_H_PA2	
<input type="checkbox"/>	WS_H_AG_MR	WS_H_AG_MR	Hierarchy	Route1	WS_H_PA1	

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

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

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

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Attributes Assignments Search Criteria Results Format Display Settings Relationship Rules

Hierarchies: Assignments > About Page: Attribute Groups >

Add Attribute Groups to Hierarchy Purpose

Specify parameters and values to filter the data that is displayed in your results set.

☒ Show table data when all conditions are met.
☐ Show table data when any condition is met.

Display Name is
Description is
Internal Name is
Behavior is

Go Clear Add Another Attribute Group Type Add

Select All Select None

Select Display Name	Internal Name	Description	Business Entity	Behavior	Attribute Group Type
<input type="checkbox"/> Copy from RP Hierarchy Multi-Row	Rg_H_AG_MR		Hierarchy	Multi-Row	Hierarchy
<input type="checkbox"/> Franchise stores	Franchise_stores	Stores in mall locaitons	Hierarchy	Single-Row	Hierarchy
<input type="checkbox"/> RG Hierarchy single Row	RG_H_AG_SR	copy from RP	Hierarchy	Single-Row	Hierarchy
<input type="checkbox"/> RG Hierarchy single Row	RG_SR_AG2	RG_SR_AG2	Hierarchy	Single-Row	Hierarchy
<input type="checkbox"/> RG SR AG1	RG_SR_AG1	RG_SR_AG1	Hierarchy	Single-Row	Hierarchy

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

To view and update hierarchy attribute group assignments:

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

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

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

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* Purpose: * Indicates required field

[Attribute Groups](#)
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Attribute Groups

View Attribute Groups For: [Hierarchy](#)

Search

Search By:

Select Attribute Groups:

[Select All](#) | [Select None](#)

Select	Display Name	Description	Data Level	Classification	Pages	Update Actions
<input type="checkbox"/>	Franchise stores	Stores in mall locaitons	Hierarchy	Route1		
<input type="checkbox"/>	WS_H_AG_SR	WS_H_AG_SR	Hierarchy	Route1	WS_H_PA1	
<input type="checkbox"/>	WS_H_AG_MR_VS	WS_H_AG_MR_VS	Hierarchy	Route1	WS_H_PA2	
<input type="checkbox"/>	WS_H_AG_SR_VS	WS_H_AG_SR_VS	Hierarchy	Route1	WS_H_PA2	
<input type="checkbox"/>	WS_H_AG_MR	WS_H_AG_MR	Hierarchy	Route1	WS_H_PA1	

3. Select Add Attribute Groups if you want to add attributes to specific site purpose records.
4. Select Update Action to navigate to the Actions page. See: Adding Actions to an Attribute Group, *Oracle Product Information Management Implementation Guide*

* Purpose:

* Indicates required field

Attribute Groups **Attribute Pages**

Pages

View Attribute Groups For:

Search

Search By:

Select Item Pages:

[Select All](#) | [Select None](#)

Select Sequence	Display Name	Internal Name	Description	Classification
<input type="checkbox"/> 10	WS_H_PA1	WS_H_PA1	WS_H_PA1	Route1
<input type="checkbox"/> 20	WS_H_PA2	WS_H_PA2	WS_H_PA2_VS	Route1

5. In the Attribute Pages tab, select a record to display the Attribute Group Details page. See: Viewing, Creating, and Editing Hierarchy Attribute Groups, page 4-38

Creating Hierarchy Attribute Pages

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

To create hierarchy attribute pages:

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

The pages that currently exist display in the table.

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Attributes Assignments Search Criteria Results Format Display Settings Relationship Rules

* Purpose: Route1 Go

* Indicates required field

Attribute Groups Attribute Pages

Pages

View Attribute Groups For Hierarchy

Search

Search By: Display Name Go

Create Page

Select Item Pages: Delete

Select All Select None

Select Sequence	Display Name	Internal Name	Description	Classification
<input type="checkbox"/> 10	WS_H_PA1	WS_H_PA1	WS_H_PA1	Route1
<input type="checkbox"/> 20	WS_H_PA2	WS_H_PA2	WS_H_PA2_VS	Route1

4. Select Create Page.

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Attributes Assignments Search Criteria Results Format Display Settings Relationship Rules

Hierarchies: Assignments >

Create Hierarchy Purpose Page

* Indicates required field

Basic Information

* Display Name: Franchise_store_hierarchy

* Internal Name: franchise

Description: hierarchy for stores in the mall

* Sequence: 30

Business Entity: Hierarchy

Attribute Groups

Select	*Sequence	*Display Name	Description
	No results found.		

Add Another Row

Cancel Apply

5. In the Create Hierarchy Page region, create an attribute page for the hierarchy purpose by entering data in the Basic Information region:
- Display Name—name displayed on the page
 - Description—a description of the attribute category
 - Internal Name—internal name for the page, this value cannot be updated once a page has been created

- Sequence—sequence number for each page associated with an attribute group, the sequence number determines the order pages are listed
6. In the Attribute Groups region, select Add Another Row to add attributes groups to this page. To add an existing attribute group:
- Enter a Sequence number
 - Select an existing Display Name value

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Attributes Assignments Search Criteria Results Format Display Settings Relationship Rules

Hierarchies: Assignments >

Create Hierarchy Purpose Page

* Indicates required field

Basic Information

* Display Name: Franchise_store_hierarchy * Internal Name: franchise

Description: hierarchy for stores in the mall * Sequence: 30

Business Entity: Hierarchy

Attribute Groups

Select Object: Delete

Select All Select None

Select	* Sequence	* Display Name	Description
<input type="checkbox"/>	10	Franchise stores	Stores in mall locations

Add Another Row

Cancel Apply

7. Select Apply to save your work.

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

Viewing and Defining Hierarchy Display Settings

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

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

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

See: Overview of Site Hierarchies, page 6-1

To view and define hierarchy display icons:

1. Navigate to the Hierarchies Display Settings page.
2. In the Icons tabbed region, a list of the existing hierarchy or site and icon associations display in the table.

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Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments Search Criteria Results Format Display Settings Relationship Rules

Display settings : Icons and Attribute Pages

Cancel Save

Icons Attribute Pages

Select: Icon File Browse... Upload

Select	*Entity	*Purpose	*File Name	*Image Delete
<input checked="" type="radio"/>	Site	Retail Show Room	Canon.jpg	
<input type="radio"/>	Node	Root	mailbox.jpg	
<input type="radio"/>	Node	Franchise		

Add Another Row

Cancel Save

3. Select Add Another Row, and select an Entity type. Choices are Site or hierarchy Node.
4. Select a value in the Purpose field according to the type of Entity selected:
 - Site: Site Purpose
 - Node: Hierarchy Purpose

Note: Purposes are associated to only one icon record.

5. To import an image, select an entity record in the Icons table.
6. Select Browse to search for a graphic image in the Icon File box, and select it.
7. Select Upload to associate it with the record.

8. Save your work.

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

1. Navigate to the Hierarchies Display Settings page, the Attribute Pages tabbed region.
2. In the Entity field, select the entity type, Hierarchy or Site.
 - For Hierarchy, you see the association of hierarchy purpose records with hierarchy attribute pages.
 - For Sites, you see the association of hierarchy and site purpose records, with site attribute pages.

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Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments Search Criteria Results Format Display Settings Relationship Rules

Display settings : Icons and Attribute Pages

Icons Attribute Pages

* Entity Hierarchy

*Hierarchy Purpose	*Attribute Page	Delete
Store	rg_hie_page	
Route1	WS_H_PA1	

Add Another Row

WS_H_PA1
WS_H_PA2

Cancel Save

3. To create an association with a hierarchy purpose and hierarchy attribute page, select Hierarchy in the Entity field.
4. Select Add Another Row, and select a value in the Hierarchy Purpose field.
5. Select a Hierarchy Attribute Page value in the Attribute Page field.
6. Save your work.
7. To create an association with a hierarchy site purpose and site attribute page, select Site in the Entity field.
8. Select Add Another Row, and select a value in the Hierarchy Purpose field.
9. Select a value in the Site Purpose field.

10. Select a value in the Site Attribute Page value Attribute Page field.
11. Save your work.

Defining Hierarchy Relationship Rules

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

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

To view and define hierarchy relationship rules:

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

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Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments Search Criteria Results Format Display Settings Relationship Rules

Relationship Rules

* Indicates required field

Cancel Save

Allowed Hierarchy Relationships

Hierarchy Purpose Store

Relationship Type	*Parent Type	*Purpose	*Child Type	*Purpose	Delete
Parent-Child	Node	Root	Node	Child1	
Parent-Child	Node	Child1	Site	Store	
Parent-Child	Node	Root	Node	Parent	
Parent-Child	Node	Parent	Node	Child1	

Add Another Row

Cancel Save

3. To define a new rule, select Add Another Row, and select a value in the Parent Type field. Choices are hierarchy Node or Site type.
4. Select the applicable purpose associated to the Parent Type, that is, the site or hierarchy purpose.
5. Select the Child Type for this Parent Type, choices are Node or Site.
6. Select the associated Purpose value for the Child Type.
7. Save your work.

Setting Up Search Functions

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

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

To view and create site search criteria:

1. Navigate to the Site Search Criteria page

2. Select a value in the site Purpose field.
3. Optionally, you can select values in the Trade Area Group and Country fields.

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Attributes Assignments Search Criteria Results Format Import Format

Search Criteria

* Indicates required field

Context

* Purpose: Retail Show Room Country: United States

Trade Area Group: [Search]

Go

Search Criteria

Select Search Criteria: Delete Create

Select All Select None

Select	Name	Description	Site Purpose	Country	Default	Copy	Update
<input type="checkbox"/>	MR_SC1	Multirrow search criteria	Retail Show Room	United States	No		
<input type="checkbox"/>	Retail in United States	Purpose + Country	Retail Show Room	United States	No		

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

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

To view and create hierarchy search criteria:

1. Navigate to the Hierarchy Search Criteria page.
2. Select a value in the hierarchy Purpose field.
3. Select Go. Search criteria results records are displayed in the table.

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Sites Locations Trade Areas **Hierarchies** Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments **Search Criteria** Results Format Display Settings Relationship Rules

Search Criteria

* Indicates required field

Context

* Purpose Root Go

Search Criteria

Select Search Criteria: Delete | Create

[Select All](#) | [Select None](#)

Select Name	Description	Hierarchy Purpose	Default	Copy	Update
<input type="checkbox"/> rg_sc_root1	rg_sc_root1	Root	No		

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

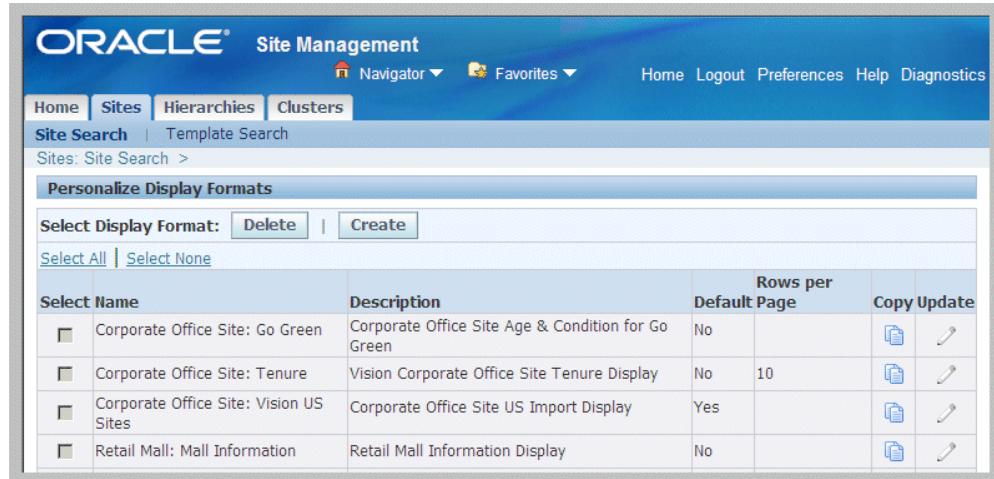
To personalize site search result formats:

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

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

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

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



To define formats for your search results:

1. Navigate to the Results Format page from either the Sites or Hierarchies tabbed regions.
2. For sites, in the Context region, select a value in the Purpose field. Optionally you can select values in the Country and Trade Area Group fields.

For hierarchies, select a value in the Purpose field.

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

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

Setting Import Formats

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

To view formats for importing sites:

1. Navigate to the Import Format page.
2. In the Context region, select a value in the Purpose field. Optionally you can select values in the Country and Trade Area Group fields.

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

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

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

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Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Attributes Assignments Search Criteria Results Format **Import Format**

Import Format

* Indicates required field

Context

* Purpose Retail Show Room Country United States

Trade Area Group

Go

Import Formats

Select Import Formats: Delete Create

Select All Select None

Select	Name	Description	Site Purpose	Country	Default	Data Level	Copy	Update
<input type="checkbox"/>	MR_IF1	Multirow support	Retail Show Room	United States	Yes			
<input type="checkbox"/>	ST3_IF1	Retail showroom in USA	Retail Show Room	United States	No			

To create an import format:

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

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

4. Select attribute column values in the View Columns region. Search for attribute column values by selecting values in the following fields:
 - Attribute Name
 - Selected Contexts
 - Attribute Group
5. Select Go to display the results of your search.
6. Select records in the Available Columns box—and move to the Selected box using the Arrow tool.
7. You have the option to customize your import format by renaming the attribute columns. Select Rename Columns to navigate to the Rename Columns page.
The original column names of the records selected appear on this page.
8. Enter the new column names in the New Column Name field, and select Apply to save your work.

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

Implementation Guide

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

9. Select Apply to create your import format.

To create an import format by copying another record:

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

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

2. Enter a unique value in the Name field.

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

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

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

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

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

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

6. Select Apply to create your import format.

To create modify an import format:

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

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

- Name
- Description
- Set as Default
- Selected Columns

- Column Names

3. Select Apply to save your work.

Defining Site Map Preferences

Site Hub offers the ability to view sites on a map using Google Maps. The geographic location of sites is an important component of ongoing business processes such as merchandise selection, revenue forecasts, competitive analysis, and marketing. You can also set information such as competitor sites and trade areas. The Map Preferences tabbed region consists of two pages: Map Preferences is used to set map icons and window information, and Geocoder is the concurrent program used to create the map.

The Map Preferences tabbed region enables you to:

- Upload images to be displayed as markers for a site purpose, enabling you to easily distinguish sites on a Google Map. These markers can be used for your own sites, competitor sites, potential sites, and different trade areas for the various trade area groups of sites.
- Upload image files of any file size for icons on the map. Images are automatically sized when uploaded. A default marker is shown if an image is not uploaded and set for display for a site purpose.
- Select attribute pages for a site, location, or trade area group. The pages display for each entity when you select the site on the map. For example:
 - Site entity—set an attribute page for each site purpose
 - Location entity—set an attribute page for each country
 - Trade area entity—set an attribute page for each trade area group
- Set scheduling details in the Geocoder concurrent program to obtain the spatial coordinates of the site.

For information on the basics of Google Maps viewing, searching, displays, and problem resolution—access the Google Maps Help Center at maps.google.com/support/?hl=en.

Map Setup

Google maps can be used in Site Hub without setting up map preferences, but the profile options must be set to use default functionality. Google Inc. requires license registration by obtaining a Google Map key.

Setting up map functionality in your environment:

1. Obtain the Google Map key from Google, Inc.

The key is obtained from this site: google.com/apis/maps/signup.html. The key is generated based on the hostname of the application server.
2. Navigate to the Personal Profile Values window, and select the profile option CSF: Google Map Key.
3. Enter the map key you obtained from Google, Inc. into the Default Value field, and save your record.
4. Select the profile option RRS: Google Map Client ID, and enter the client identification provided by Google, Inc.

The Client ID is obtained after purchasing an Enterprise license from Google. See: <http://www.google.com/enterprise/>
5. Generate the Locations Spatial Index Rebuild concurrent request in the Trading Community Manager responsibility.

This program builds a spatial index on the HZ_LOCATIONS table. See: Locations Spatial Index Rebuild, Oracle Trading Community Architecture Administration Guide.
6. Set the profile option, Applications Server-Side Proxy Host And Domain to your proxy server name.
7. Set the profile option, Applications Proxy Port to your proxy port.
8. Optionally, you can set the profile option RRS: Trade Area Group Map Layout Type to set trade areas on the map as filled with color, or not.
9. Save your work.

To define site map preferences:

1. Navigate to the Map Preferences tabbed region, the Map Preferences section.

In the Icons tabbed region, a list of the existing map icons display in a tabular format.

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Map Preferences Geocoder

Site Map Preferences

Cancel Apply

Icons Info Window

Select : Icon File Browse... Upload

Select	*Site Purpose	*Site Type	*File Name	*Image	*Display	Delete
<input checked="" type="radio"/>	Retail Show Room	External	VH.jpg		Yes	
<input type="radio"/>	Retail Show Room	Internal	LP.jpg		Yes	

Add Another Row

Cancel Apply

2. Select Add Another Row, and select a record in the Site Purpose field.

This is the primary business purpose of the site.

3. In the Site Type field, select either Internal or External.

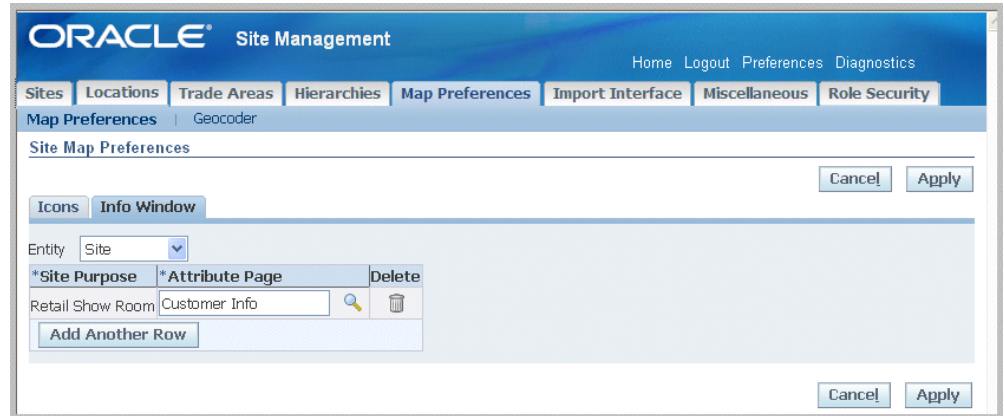
4. To import an image for the map, select a value in the Icon File box by using the Browse button.

If icons are not uploaded for a record, a default marker is displayed. The File Name displays after uploading the graphic file.

5. Select a value in the Display field.

Your choices are Yes or No. This sets whether or not the site is mapped with this icon. If set to No, the default icon is used on the map.

6. Select Apply to save your work.



7. In the Information Window tab you can view and add attribute pages for Site, Location, and Trade Areas. Select an entity value:

- Site—select a Site Purpose and Attribute Page value
- Location—select a Country and Attribute Page value
- Trade Area—select a Trade Area Group and Attribute Page value

Note: The Site, Trade Areas, and Location entities display in the Information Window if existing Attribute Pages are assigned to a Site Purpose.

8. Select Apply to save your work.

Related Topics

Google Maps Help Center: <http://maps.google.com/support/?hl=en>

Profile Options, page 2-5

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

Site Geocode Program, page 4-63

Site Geocoder Program

The Geocoder program is a concurrent request based on geometry coordinates used to view sites on a Google Map. The program calculates the geocodes using Google programming interfaces to find geodetic coordinates, that is, the latitude and longitude of a site. These coordinates are based on the primary address of the site, and the information is stored in Site Hub for spacial analysis around a site.

The Geocoder enables scheduling from geocoding for new sites, specific sites and purposes, or sites that had errors and were not geocoded during site creation. You can launch this program for a large number of sites, typically after a bulk import.

The profile option, RRS: Default Geocoding Preference, is used to set the default value for launching this program when creating site records. If set to System Generated, the program uses the address fields entered in the site record and is automatically launched when the record is saved. If set to User Entered, the program uses the longitude and latitude values and must be manually launched. See: Profile Options, page 2-5

To launch the Geocoder concurrent program:

1. Navigate to the Geocoder page.
2. You have the option to select values in the following fields:
 - Site field if you want to run this program for a specific site.
 - Purpose field if you want to run this program for sites with a specific purpose.
 - Only Errored Sites field if you want to run this program for site records that were not mapped during site creation.
3. Select Submit to launch the Geocode concurrent request, or select Next to set scheduling parameters.

The screenshot displays the Oracle Site Management interface for the Geocoder. The top navigation bar includes links for Home, Logout, Preferences, Help, Personalize Page, and Diagnostics. Below this, a series of tabs allows navigation between different sections: Sites, Locations, Trade Areas, Hierarchies, Map Preferences (selected), Import Interface, Miscellaneous, and Role. The 'Map Preferences' section is active, and the 'Geocoder' sub-tab is selected. A progress bar at the top of the form area shows five steps: Parameters (highlighted), Schedule, Layout, Notifications, and Review. The main form is titled 'Schedule Request: Parameters' and includes a note: '* Indicates required field'. The form contains the following fields and controls:

- Program Name:** Site Hub Geocoder
- Request Name:** Site Hub Geocoder
- Site:** A dropdown menu with 'Chain Store1' selected.
- Purpose:** A dropdown menu with 'Retail Show Room' selected.
- Only Errored Sites:** An empty text input field.

At the bottom right of the form, there are three buttons: 'Cancel', 'Submit', and 'Next'. The text 'Step 1 of 5' is displayed next to the 'Next' button. The footer of the page includes links for 'About this Page' and 'Privacy Statement', and a copyright notice: 'Copyright (c) 2006, Oracle. All rights reserved.'

4. If you select Next, the Schedule Request: Schedule page appears. The process train highlights each step as you proceed through the pages where you can select runtime details for this request including:

- Schedule—Start Dates, Recurrence, Interval, Schedule Name
 - Notifications—Recipients
 - Review
5. Select Submit to launch the report.

Using the Import Interface

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

- RRS_SITES_INTERFACE
- RRS_SITE_UA_INTF
- RRS_LOCATION_UA_INTF
- RRS_TRADEAREA_UA_INTF

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

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Sites Locations Trade Areas Hierarchies Map Preferences **Import Interface** Miscellaneous Role Security

Name Parameters Schedule Layout Notifications Review

Schedule Request: Name

* Indicates required field

Manage Schedule Cancel Step 1 of 7: Program Name Next Submit

Program Name RRS Site Import Interface Program

Description RRS Site Import Interface Program

Language Settings

Select All Select None

Select	*Language	*Territory	Numeric Character
<input checked="" type="checkbox"/>	American English	AMERICA	,,
<input type="checkbox"/>	Arabic	UNITED ARAB EMIRATES	
<input type="checkbox"/>	Korean	KOREA	

Manage Schedule Cancel Step 1 of 7: Program Name Next Submit

Associating Value Sets to Attributes

Oracle Application Object Library uses values, value sets and validation tables as components of flexfields and standard request submission. In Oracle Site Hub, attributes capture all the detailed information about sites. When creating your attributes, you can create records with validation logic to support the needs of your organization. This functionality is enabled by associating value sets with your attributes. It is recommended that you create value sets before defining your attribute groups. Value sets have the following features in Site Hub:

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

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

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

To search for and view existing value set records:

1. Navigate to the Maintain Value Sets page in the Miscellaneous tabbed region of the Administrator.
All existing records appear in the Value Sets region of the page.
2. You can filter records by entering values in the Value Set Name, Description, Data

Type, and Validation Type fields—and selecting Go.

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

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Value Sets | Functions

Maintain Value Sets

Value Set Name Data Type

Description Validation Type

Value Sets

From here, you can search for existing Value Sets or create new Value Sets.

Previous 1-25 Next 25

Name	Description	Data Type	Maximum Size	Validation Type	Minimum Value	Maximum Value	Parent Value Set	Create Child Value Set
15 Characters	15 Characters	Char	15	None				
20 Characters	20 Characters	Char	20	None				
30 Characters Optional	30 Characters Optional	Char	30	None				
4 Characters	4 Alpha/Numeric characters no validation	Char	4	None				
50 chars	50 chars, no validation	Char	50	None				
7/Number	A 7 digit positive number field with no validation	Number	10	None	1	9999999		

To create a value set record:

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

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

4. Select Apply to save your work.

Viewing and Creating User Defined Functions

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

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

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

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

To view and create user functions:

1. Navigate to the Functions page.

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

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

ORACLE Site Management

Navigator Favorites Home Logout Preferences Help Diagnostic

Sites Locations Trade Areas Hierarchies Map Preferences Import Interface Miscellaneous Role Security

Value Sets Functions

Functions

Search and Select: Functions

Search

To find your Function, select a filter in the poplist and enter a word in the text field, then click "Go". To see a list of all the Functions, clear the search box and click "Go".

* Search By **Display Name** **Go**

Results

Create Function

Select Function(s) and... Delete

Select All | Select None

Select Display Name	Internal Name	Description	Function Type	Update
<input type="checkbox"/> ClassifyECO	ClassifyECO	Procedure to classify engineering change orders	PL/SQL	
<input type="checkbox"/> Function_1_ABA	Function_1_ABA	Function_1_ABA	PL/SQL	
<input type="checkbox"/> GTIN Generation Function	GTIN_GEN	GTIN Generation Function	PL/SQL	

4. To edit a function record, select a record and select Update to display the Edit Function page.
5. To create a user defined function, select Create Function.
6. On the Create Function page, enter the following information:
 - Internal Name: Internal name of the function.
 - Display Name: Name of the function as it appears on the page.
 - Description
 - Function Type: Whenever you define a function, there must be an underlying implementation of that function. The supported function types are:
 - Java: When you select Java, specify the class in which the method resides and the method that implements your custom logic.
 - PL/SQL: When you select PL/SQL, specify the package and the procedure that implements your custom logic.

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

The screenshot shows the Oracle Site Management interface. The top navigation bar includes the Oracle logo, 'Site Management' title, and links for Navigator, Favorites, Home, Logout, Preferences, Help, and Diagnostics. Below this is a tabbed menu with 'Sites', 'Locations', 'Trade Areas', 'Hierarchies', 'Map Preferences', 'Import Interface', 'Miscellaneous', and 'Role Security'. The 'Miscellaneous' tab is active, showing a breadcrumb trail: 'Miscellaneous: Functions: Functions > About Page: Functions List >'. On the left, a sidebar menu has 'Functions' selected. The main content area is titled 'Create Function' and includes a note: '* Indicates required field'. The form fields are:

- * Internal Name: Text input field
- * Display Name: Text input field
- Description: Text area with up/down arrows
- * Function Type: Dropdown menu with 'Java' selected
- * Class: Text input field
- * Method: Text input field

 At the bottom right are 'Cancel' and 'Apply' buttons.

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

Site Management

This chapter covers the following topics:

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

Overview of Site Management

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

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

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

check boxes on appropriate pages.

The screenshot shows the Oracle Site Management web application. The top navigation bar includes the Oracle logo, 'Site Management' title, and links for Navigator, Favorites, Home, Logout, Preferences, Help, and Diagnostics. Below this is a secondary navigation bar with tabs for Home, Sites, Hierarchies, and Clusters. A search bar is present with a 'Name' dropdown, a text input field, a 'Go' button, and a link to 'Advanced Search'. The main content area is titled 'Welcome' and features three tabs: 'My Sites', 'My Hierarchies', and 'My Clusters'. The 'My Sites' tab is active, showing a 'Manage My Sites' button and a table of site records. The table has columns for Number, Name, Purpose, Status, Type, and Update. Below the table is a 'Notifications' section with a table showing messages from the system and a user named Jonathan Smith.

Number	Name	Purpose	Status	Type	Update
SITE125	SITE125	Bill To	Active	Internal	
MBOX001	MBOX001	Mail Box	Active	Internal	
Retail010	Big Bazaar 004	Retail Show Room	Active	Internal	

From	Type	Subject	Sent	Due
	Suppliers ASN Creation Notification	ASN sh1237 has been submitted by Allied Manufacturing : Expected Receipt Date is 22-SEP-2009 16:30:24	22-Sep-2009	
	Suppliers ASN Creation Notification	ASN sh1236 has been submitted by Allied Manufacturing : Expected Receipt Date is 22-SEP-2009 16:22:46	22-Sep-2009	
Smith, Jonathan	PO Approval	Standard Purchase Order 5879 has been approved	22-Sep-2009	

Managing Favorites

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

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

To select favorites records:

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

- Clusters: Manage My Clusters

ORACLE Site Management

Home Sites Hierarchies Clusters

Home > Manage My Sites

Select Sites : Remove

Select All | Select None

Select	Number	Name	Purpose	Status	Type	Remove
<input type="checkbox"/>	WS_HRCOARSE_SITE125	WS_HRCOARSE_SITE125	Bill To	Active	Internal	
<input type="checkbox"/>	MBOX001	MBOX001	Mail Box	Active	Internal	
<input type="checkbox"/>	Retail010	Big Bazaar 004	Retail Show Room	Active	Internal	
<input type="checkbox"/>	<input type="text"/>					
<input type="checkbox"/>	<input type="text"/>					

Add 5 Rows

Cancel Apply

4. Select Add Rows to search for an appropriate record.
5. Save your work.

Related Topics

Searching for Information, page 5-3

Viewing Site Information, page 5-10

Creating Sites, page 5-15

Searching for Information

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

- Simple Search enables searching when looking for a small number of sites, where you know some specific information such as name or record number. You can also select the My Sites, My Cluster, My Hierarchies, or My Templates check boxes to display the records you included in your Favorites list.
- Advanced Search provides searching using multiple search criteria and conditional qualifiers. This enables you to enter keywords or values, using qualifiers. This method is used when looking for very specific values.

- For complex searches performed on a regular basis, you can predefine and save search criteria. You can also define the search results format displayed.
- You have the ability to sort search results and specify if the attributes should be sorted alphabetically or numerically, and in ascending or descending order.
- Site comparisons can be performed after results have been displayed. This enables you to select sites from the search results and compare data.

To search using the Simple Search page:

1. Navigate to the Simple Search page for either sites, hierarchies, clusters, or templates.
2. Enter search criteria, depending on the entity you are searching:
 - Sites
Choices are Name, Number, or Status values. You can enable the My Sites check box to display the sites you included in your My Sites list.
 - Clusters
Choices are Name or Description values. You can enable the My Clusters check box to display the records you included in your My Clusters list.
 - Hierarchies
Choices are Name, Description, or Purpose values. You can enable the My Hierarchies check box to display the records you included in your My Hierarchies list. See: Viewing Site Hierarchies, page 6-2
 - Templates
Choices are Name or Number values. You can enable the My Templates check box to display the sites created using your login information.

ORACLE Site Management

Home Logout Preferences Diagnostics

Home Sites Hierarchies Clusters

Site Search | Template Search

Sites

Simple Search

Search: Name [] ☐ My Sites [Advanced Search](#)

Results Format: Display 001

Select Site Name	Brand Name	Calendar	Number	External Party	Purpose	Status	Update
No search conducted							

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

ORACLE Site Management

Home Logout Preferences Help Diagnostics

Home Sites Hierarchies Clusters

Site Search | Template Search

Sites: Sites >

Sites

Simple Search

Search: Number [5%] ☐ My Sites [Advanced Search](#)

Results Format: Stops in the U.S.

Select Site: Add to Cluster

[Select All](#) | [Select None](#)

Select Site Number	Site Name	Update
<input type="checkbox"/> 5000	Newark Mall	<input type="button" value="Update"/>
<input type="checkbox"/> 5001	Great Mall	<input type="button" value="Update"/>
<input type="checkbox"/> 5002	Best Buy	<input type="button" value="Update"/>

4. To create a new record, select Create. See:
 - Creating Sites, page 5-15
 - Viewing and Creating Site Clusters, page 5-39
 - Creating Hierarchies, page 6-5
 - Viewing and Creating Site Templates, page 5-43

To configure and access other pages in site searches:

1. For Site searches, you can use other formats for the results display: Select a value in the Results Format field
2. Select Go to re-configure the display with another format.
3. To customize search formats, select Personalize, page 4-55

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

Choices include:

- Add to Cluster, see: Viewing and Creating Site Clusters, page 5-39
- Add to Hierarchy, see: Viewing Site Hierarchies, page 6-2
- Add to My Sites
- Compare, see: Comparing Sites, page 5-38
- Create Asset, see: Creating Site Assets, page 5-48
- Create Cluster, see: Viewing and Creating Site Clusters, page 5-39
- Create Inventory Organization, see: Creating and Assigning Inventory Organizations to Sites, page 5-50
- Create Property Location, see: Creating Property Locations for Sites, page 5-49
- Export, see: Creating Sites Using the Export and Import Function, page 5-25
- Map Sites, see: Viewing Site Information, page 5-10
- Select Export All to export records to a spreadsheet.
- Select records to insert on a map, and select Map All, see: Defining Site Map Preferences, page 4-60
- Select a record Number link in the table to navigate to see details of the site, see: Viewing Site Information, page 5-10
- Choose a record and select Update to navigate to the Edit Site page.

5. Select Go to display the appropriate page.

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

To search for records using the Advanced Search page:

1. Navigate to the Advanced Search page.
2. In the Context region, select a Purpose value. For site advanced searches you can

also select values in the Country, Trade Area Group, and Trade Area fields.

The screenshot shows the Oracle Site Management web application. The top navigation bar includes the Oracle logo, 'Site Management' title, and links for Navigator, Favorites, Home, Logout, Preferences, Help, and Diagnostics. Below this is a secondary navigation bar with 'Home', 'Sites', 'Hierarchies', and 'Clusters'. The main content area is titled 'Site Search' and 'Template Search'. Under 'Site Search', there is a link to 'Sites: Site Search >'. The 'Advanced Search' section is active, showing a search criteria form. The form includes a legend: '* Indicates required field'. The search criteria are: '* Purpose' (dropdown menu with 'Retail Store' selected), 'Country' (dropdown menu with 'United States' selected), 'Trade Area Group' (text input field), and 'Trade Area' (dropdown menu). There is a 'Go' button below the 'Trade Area Group' field. At the bottom right of the form, there are 'Simple Search' and 'Cancel' buttons.

3. Select Go to display Search Criteria and Display Format regions to select other search criteria.
4. In the Search Criteria box, choose a record and select Go to display the Attribute Group and Attribute values.

Search Criteria

Search Criteria: Retail in United States

Select Criteria: |

[Select All](#) | [Select None](#)

Select	Attribute Group	Attribute	Operator	Value
<input type="checkbox"/>	Primary	^ Name	is	Vision Industries
<input type="checkbox"/>	Primary	^ Number	is	
<input type="checkbox"/>	Primary	City	is	
<input type="checkbox"/>		Unreserved Parking	is	4000
<input type="checkbox"/>		^ Quarter	is	
<input type="checkbox"/>		^ Working Days	is	7
<input type="checkbox"/>		Designation	is	

TIP ^ Indicates indexed attribute. You must enter at least one indexed attribute to perform a search.

Filter by

Type: Name:

Display Format

Display Format:

5. Select an Attribute Group value, and enter values in the Operator and Value fields:
 - Operator—qualifiers include the following:
 - is
 - is not
 - contains
 - starts with
 - ends with
 - Value—any user-defined value
6. To duplicate a value on the list and use other search criteria value, choose an Attribute Group value and select Duplicate.
7. Select Add Criteria to display the Add Criteria page. This page is used to add more attribute values to the search criteria list. See: *Managing Search Criteria, Oracle Product Information Management Implementation Guide*

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

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

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

To personalize search formats, select Personalize, page 4-55

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

11. The results page enables you to navigate to other pages to perform the following:

- To personalize search formats, select Personalize, page 4-55
- Select records, and in the Select Site box, choose one of the options. Select Go. Your choices include:
 - Add to Cluster, see: Viewing and Creating Site Clusters, page 5-39
 - Add to Hierarchy, see: Viewing Site Hierarchies, page 6-2
 - Add to My Sites
 - Compare, see: Comparing Sites, page 5-38
 - Create Asset, see: Creating Site Assets, page 5-48
 - Create Cluster, see: Viewing and Creating Site Clusters, page 5-39
 - Create Inventory Organization, see: Creating and Assigning Inventory Organizations to Sites, page 5-50
 - Create Property Location, see Creating Property Locations for Sites, page 5-49
 - Export, see: Creating Sites Using the Export and Import Function, page 5-25
 - Map Sites, see: Viewing Site Information, page 5-10
- To add new sites, select Create. See: Creating Sites, page 5-15

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

Viewing Site Information

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

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

ORACLE® Site Management

Personalize
 Home Logout Preferences Help Page

Home Sites Hierarchies Clusters

Site Search | Template Search
 Home > Sites >

View Site: MBOX0001

* Indicates required field

Cancel Save Apply

Number **MBOX001** Brand Name **Brand Factory**
 Name **MBOX001** Calendar
 Type **Internal** Legal Entity **Vision ADB**
 Status **Active**

Basic Information Associations Attributes Contacts Attachments Assets

Primary Address

Country **United States**
 Address Line 1 500 Oracle Parkway
 Address Line 2
 Address Line 3
 Address Line 4
 City REDWOOD CITY
 County SAN MATEO
 State CA
 Postal Code 94065
 Geocode Source System Generated
 Latitude 37.53071
 Longitude -122.262554

Site Purpose

Purpose	Primary	Status
Store	<input checked="" type="checkbox"/>	Active

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

- Basic Information—primary address, longitude and latitude, and site purpose data
- Associations—associated entities, property locations, trade area groups, clusters, hierarchies, and customers
- Attributes—three categories of attribute pages
- Contacts—data captured from Trading Community Architecture for parties, party sites, party relationships, and contacts
- Attachments—document attachments for this site
- Assets—assets associated with this site for maintenance organizations, including quantities and serial numbers

For detailed descriptions of these tabbed regions, see: Updating Site Records, page 5-29

Viewing Site Map Details

You can see the location and other data of a site as viewed on a map. The map enables you to select criteria for the type of site information you want displayed. For example, you can select all external sites within a specific radius. The page view consists of a Site Map and Mapped Details regions for the sites selected. The Mapped Details region displays the site summary details in a tabular format. Features of the site map include:

- **Site Icons**

Icons are defined for internal and external sites. External sites are sites not owned by your organization such as competitor sites.

- **Key Sites**

The site you use to access the map is designated as the key site. Key sites are the focal point for comparisons (internal, external, trade regions) with other sites on the map. This designation can be changed, or you can define other sites as key sites in the Actions in the Mapped Sites region.

- **Sites Not Mapped**

Sites unable to be mapped are listed in the Key Sites Not Mapped region. Sites are listed in this area when there is missing or invalid geographical or purpose data.

- **Attribute Pages**

If attribute pages are associated with a site, when you click the site icon on the map, a dialog box displays with the page information setup.

- **Trade Area Groups**

Trade area groups are represented by concentric circles defined for trade area group regions.

Note: For information on the basics of Google Maps viewing—access the Google Maps Help Center at <http://maps.google.com/support/?hl=en>.

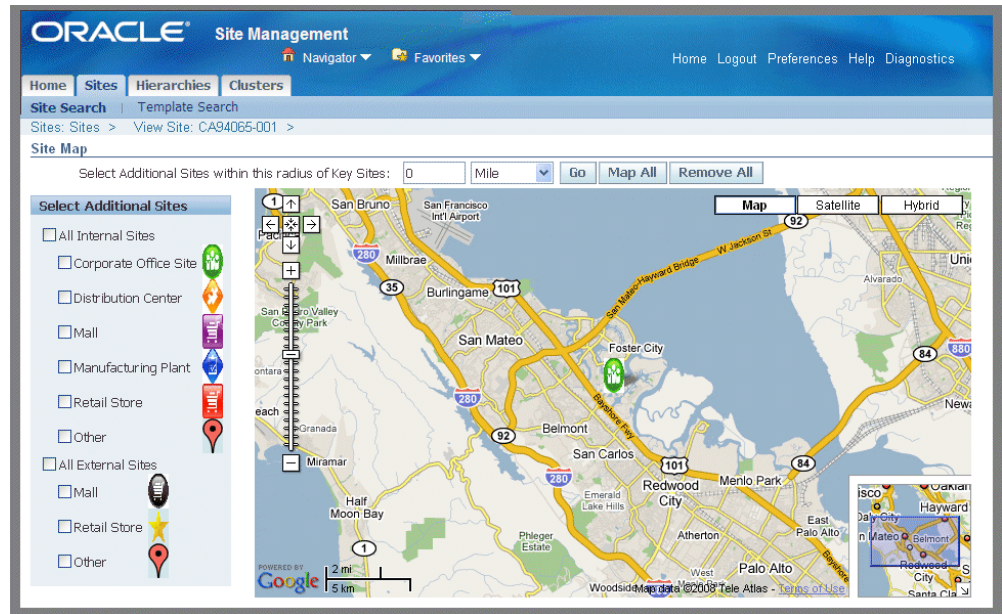
To view site map details:

1. On the View Site page, select View Map.

The Site Map is also accessed by selecting multiple records on the Sites page, and choosing Map All.

2. In the Select Additional Sites column, select site purpose icons for your sites to display on the map.

All icons uploaded in the Site Map Preferences window, the Icons tab, are displayed. Default icons display if there is no icon uploaded and associated with a site purpose. See: Defining Site Map Preferences, page 4-60



3. In the Select Additional Sites within this radius of Key Sites box, select a distance and unit of measure for the display of the sites.

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

The additional sites appear in the Mapped Sites detail table. Site summary details are displayed for Name, Number, Type, Primary Purpose, Key Site, Trade Areas, and Trade Area Group fields.

Select Show to display the information for Status, Brand Name, Calendar, Legal Entity, and Address details.

5. You can add or remove the sites on the map display by selecting Map All or Remove All.

When you select Remove All, the site defined as the Key Site, remains on the map display.

Mapped Sites

Action: Map Trade Area Group Go

[Select All](#) | [Select None](#)

Select	Details Name	Number	Type	Primary Purpose	Key Site	Show Trade Areas	Trade Area Group
<input type="checkbox"/>	Vision Headquarters	CA94065-001	Internal Corporate Office Site				Traffic

[Hide](#)

Status: **Active**

Brand Name: **Vision Operations**

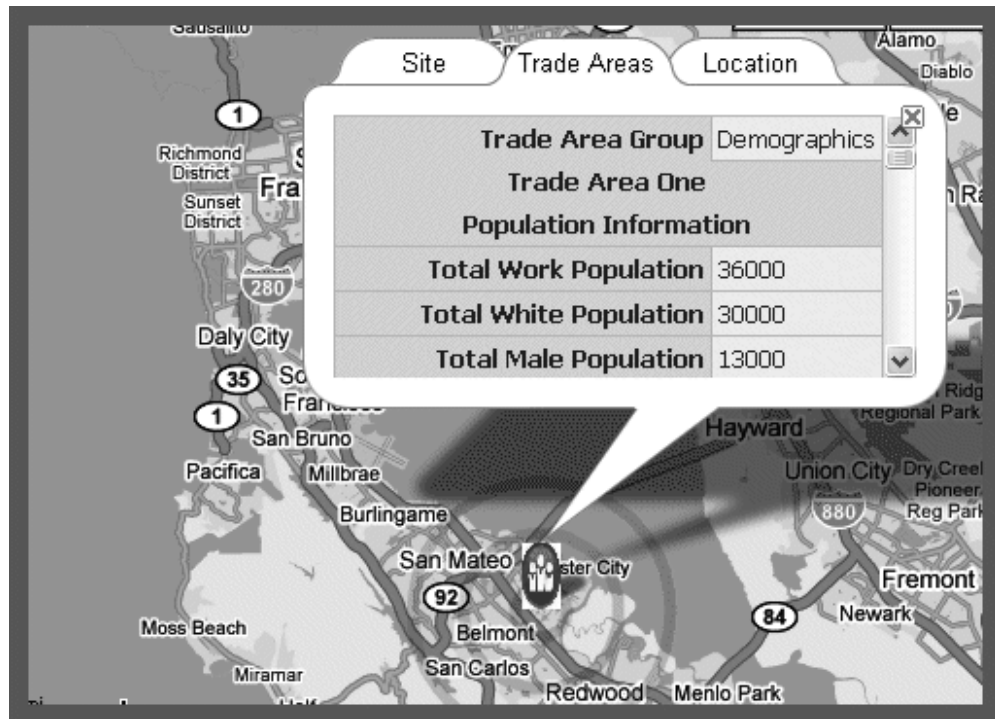
Calendar Legal Entity: **Vision Operations**

Address:

Address One	500 Oracle Parkway	County	SAN MATEO
Address Two		State	
Address Three		Province	
Address Four		Postal Code	94065
City	REDWOOD CITY	Country	United States

[Return to View Site: CA94065-001](#)

6. If attribute pages are associated with a site, when you click the site icon on the map, a dialog box displays with the page information setup.



7. You can select site records in the table, and select one of the choices in the Action box:

- Map Trade Area Group

Displays the concentric circles around the regions setup for the site representing the trade area group region. These areas are defined on the Create Trade Area Group page. See: Viewing and Creating Trade Area Groups, page 4-28

- Remove Trade Area Group

Removes the displayed concentric circular trade area group region.

- Remove Site

Clears the site icon from the map.

- Compare Up To 5 Sites

Accesses the View Comparisons page to compare sites and entity attributes for comparison of data. See: Comparing Sites, page 5-38

- Designate Key Site

Enables you to specify other sites as key sites for data comparison.

- Remove Key Site Designate

Clears the key site designation for selected sites.

Creating Sites

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

- Manual Site Creation

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

- Copying an Existing Site

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

- Templates

For organizations that have sites with similar attributes—such as a collection of stores or branches that are similar in size, merchandise, or services offered—you can create sites using configured templates. See: Viewing and Creating Site Templates, page 5-43

- File Import

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

- Import Interface

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

for large amounts of data, including site records. See: Using the Import Interface, page 4-65

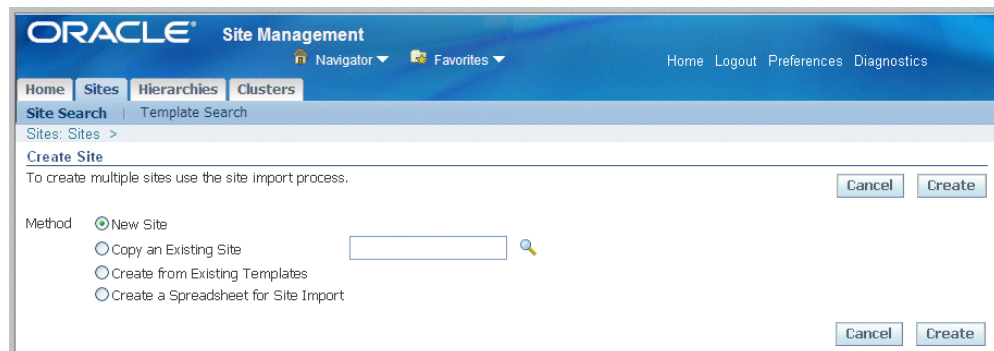
- Web Service

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

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

To manually create a new site:

1. Navigate to the Create Site page.



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

The Create Site: Basic Information page displays.

3. Enter values in the Name and Number fields.

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

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

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

The screenshot shows the Oracle Site Management interface. The top navigation bar includes 'Home', 'Sites', 'Hierarchies', and 'Clusters'. The 'Sites' tab is selected, and the 'Create Site' link is active. The form is titled 'Create Site: Basic Information' and includes a legend: '* Indicates required field'. The form contains several input fields:

- * Number: Text box with '10082' entered.
- * Name: Text box.
- Type: Dropdown menu with 'Internal' selected.
- Status: Dropdown menu with 'Active' selected.
- Brand Name: Text box with a search icon.
- Calendar: Text box with a search icon.
- Legal Entity: Text box with a search icon.

 At the top right of the form are buttons for 'Cancel', 'Save', and 'Continue'.

5. In the Primary Address region, select a value for address Source:
 - New: Displays the fields for entering an address.
 - Existing: Displays a search box to select an existing address in the Site Hub data.
6. If you choose Existing, enter a search value to display existing records to select. Your selection appears in the Primary Address region.

The screenshot shows the 'Primary Address' region of the form. It includes a 'Source' section with two radio buttons: 'New' and 'Existing'. The 'Existing' radio button is selected. To the right of the radio buttons is a search box containing the number '1' and a search icon. Below the search box, the 'Address' field is populated with the text: '188 Water St., NIAGARA FALLS ONTARIO L2G 1H2, CANADA'.

7. If you choose New, select a value in the Country field.
For new addresses, you have the option to enter values in either the address lines or in the Geocode Source fields.

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

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

The screenshot shows the 'Primary Address' form. At the top, there are two radio buttons: 'New' (selected) and 'Existing'. Below this is a text field for 'Country' with 'United States' entered and a magnifying glass icon. A note states: 'If Address1 field is not specified then its value will be defaulted to the Site Name for this site'. There are four text fields for 'Address Line 1' through 'Address Line 4'. Below these are fields for 'City', 'County', 'State' (a dropdown menu), and 'Postal Code'. At the bottom, there is a 'Geocode Source' dropdown menu set to 'System Generated', and two text fields for 'Latitude' and 'Longitude'.

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

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

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

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

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

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

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

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

The screenshot shows a dialog box titled "Site Purpose". At the top, there is a "Select Purpose :" label followed by a button labeled "Set as Primary". Below this is a table with the following structure:

Select Purpose	Primary	Status	Remove
<input type="radio"/> Customer Region	<input checked="" type="checkbox"/>	Active	

Below the table is an "Add Purpose" button. At the bottom right of the dialog are "Cancel", "Save", and "Continue" buttons.

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

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

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

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

The screenshot shows the "Oracle Site Management" application interface. The breadcrumb trail is "Sites: Sites > Create Site > Create Site: Basic Information >". The current page is "Create Site: Detail Information".

At the top right are "Cancel", "Back", and "Finish" buttons.

The main content area displays site details:

Number	Store11	Brand Name	
Name	Coffee Store	Calendar	
Type	Internal	Legal Entity	
Status	Active		

Below this is a tabbed interface with "Attributes" and "Attachments" tabs. The "Attributes" tab is active.

A tip message says: "TIP Please click Go to refresh the Attribute Groups data after selecting the Attribute Page".

Below the tip is a form with "Entity" and "Page" dropdown menus, and a "Go" button. The "Entity" dropdown is open, showing options: "Site", "Location", "Site", and "Trade Area".

At the bottom right are "Cancel", "Back", and "Finish" buttons.

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

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

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

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

18. Select Finish to save your record.

To create a new site by copying an existing site:

1. Navigate to the Create Site page.
2. Select the Copy an Existing Site method, and select the site name in the list of values box.
3. Select Create to display the Create Site: Basic Information page.

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

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

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

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

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

6. If you choose Existing, enter a search value to display existing records to select. Your selection appears in the Primary Address region.

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

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

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

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

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

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

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

Longitude and Latitude fields.

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

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

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

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

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

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

See: Copying Attribute Groups, page 5-37

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

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

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

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

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

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

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

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

18. Select Finish to save your record.

To create a new site using a template:

1. Navigate to the Create Site page.
2. Select the Create from Existing Templates method.

3. Select Create to display the Create Template: Template Selection page.
4. Select a Country value for the primary address of the template. The functionality for templates is limited to the country selected.

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

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

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

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

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

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

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

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

Your selection appears in the Primary Address region.

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

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

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

- Address Line 1- 4
 - City
 - County
 - State
 - Postal Code
12. Optionally, you can use values in the Geocode Source fields to generate the geodetic coordinates for the site, instead of the address values. The default for this field is set in the profile option: RRS: Default Geocoding Preference:
- System Generated: The Geocoder program is automatically launched when the site record is saved, and uses the address fields to find geodetic coordinates.
 - User Entered: Geocoder program uses the longitude and latitude values entered in the site record to find geodetic coordinates, and the program is manually launched to find the geodetic coordinates.
13. If you select User Entered in the Geocode Source field, enter values in the Longitude and Latitude fields.
- These fields are disabled if you selected the System Generated Geocode Source. Enter the values in decimal format.
- Note:** Use the same values for multiple sites at the same address.
14. In the Site Purpose region, use the defaulted value or select Add Purpose to set a purpose for this site.
- If you select more than one purpose, designate one record as your primary purpose by selecting Set as Primary.
15. You have the option to Select Attributes Groups for Copy. This enables you to copy available attribute groups based the purpose and country specified.
- See: Copying Attribute Groups, page 5-37
16. Select Save to save your record; or select Continue to add detail information.
- In the Create Site: Detail Information page— you can add attribute and attachment information to the site record.
17. In the Attributes tab—if attribute pages have been created—you can add details to those pages for this site. Select an entity type in the Entity box, and the page name in the Page box.

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

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

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

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

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

21. Select Finish to save your record.

See: Viewing and Creating Site Templates, page 5-43

Creating Sites Using Export and Import Function

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

Export and Import Setup

1. Set profile option BNE_ALLOW_NO_SECURITY_RULE to Yes at the User level.
2. Set profile option EGO: Enable exporting to Excel to use the export and import functionality.
3. If you are using Microsoft Excel 2003 or higher, you may need to change security settings to render the spreadsheet, see: Changing Security Settings, page 5-28
4. If the RRS: Auto Default Site Number profile is enabled, for records with identical values in the Site Name field, the following occurs for site creation using the import function:
 - Only one Site Number is assigned to all records with identical Site Names using Single-Row attribute groups.
 - Multiple Site Numbers are assigned to records with identical Site Names using Multi-Row attribute groups.

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

1. Navigate to the Create Site page.
2. Select the Create a Spreadsheet for Site Import method.

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

ORACLE Site Management

Home Sites Hierarchies Clusters

Site Search | Template Search

Sites: Site Search > Create Site >

Bulk Site Create

* Indicates required field

Cancel Export

Context

* Purpose Retail Show Room Country United States

Trade Area Group

Go

Select	Name	Description	Default
<input checked="" type="radio"/>	MR_IF1	Multirow support	Yes
<input type="radio"/>	ST3_IF1	Retail showroom in USA	No

Cancel Export

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

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

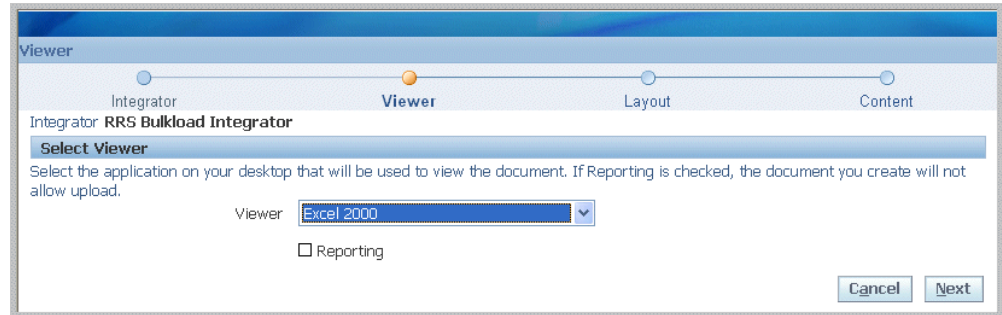
5. Select Go to display available import formats for exporting records to a spreadsheet.

The import format identifies the specific site purpose imported records inherit, and the attribute groups defined for that purpose. See: Setting Import Formats, page 4-56

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

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

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



8. Select Next.

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

9. Select Open.

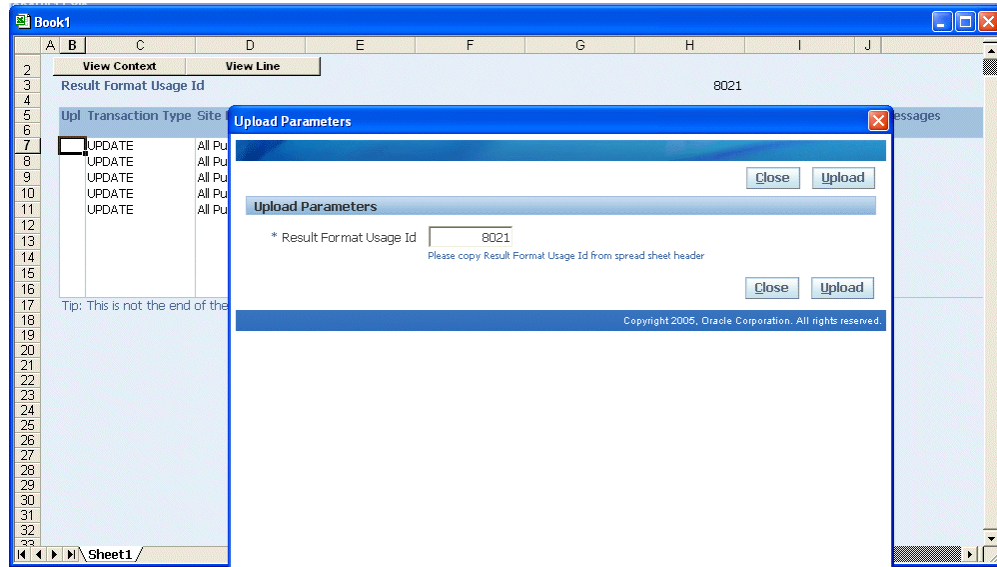
A processing message appears as the file is downloaded, and then a confirmation message when the download is successful.

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

Upl	Transaction Type	Site Purpose	Number	Name	Address	Purpose	Status	Messages
UPDATE		All Purpose	DK_Site_001	DK Site 1	2235 California St.,NStore		Active	
UPDATE		All Purpose	site1	Event Site1	100 Oracle Parkway,REDWOOD CITY, CA		Active	
UPDATE		All Purpose	site2	Event Site2	300 Oracle Pkway,CA 94065		Active	
UPDATE		All Purpose	NH_Site_1	NH Site 1	500 Oracle ParkwayStore		Active	
UPDATE		All Purpose	MyStore	Personal Store	420 Hillsdale avenueStore		Active	

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

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



13. Select Upload.

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

Changing Security Settings

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

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

To change security settings

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

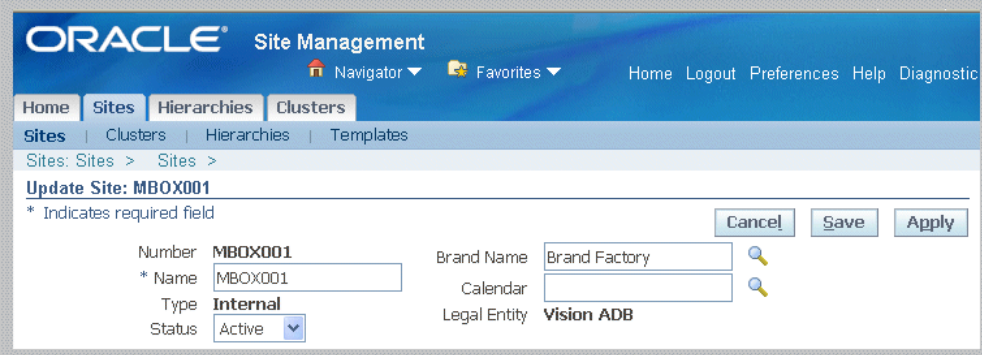
Updating Site Records

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

To update an existing site record:

1. Navigate to the Update Site page.
2. Select applicable information to change in the Name, Status, Brand Name, and Calendar fields

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



The screenshot shows the Oracle Site Management interface. The top navigation bar includes 'ORACLE Site Management', a 'Navigator' dropdown, a 'Favorites' dropdown, and links for 'Home', 'Logout', 'Preferences', 'Help', and 'Diagnostic'. Below this is a breadcrumb trail: 'Home | Sites | Hierarchies | Clusters'. The main content area is titled 'Update Site: MBOX001' and includes a note: '* Indicates required field'. The form contains several fields: 'Number' (MBOX001), '* Name' (MBOX001), 'Type' (Internal), 'Status' (Active), 'Brand Name' (Brand Factory), 'Calendar' (empty), and 'Legal Entity' (Vision ADB). There are 'Cancel', 'Save', and 'Apply' buttons at the top right of the form area.

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

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

Select View Map to view site details on a map, see: Viewing Site Information, page 5-10

Basic Information Associations Attributes Contacts Attachments Assets

Primary Address [View Map](#)

Country **United States**

Address Line 1 500 Oracle Parkway
If Address1 field is not specified then its value will be defaulted to the Site Name for this site

Address Line 2

Address Line 3

Address Line 4

City REDWOOD CITY

County SAN MATEO

State CA

Postal Code 94065

Geocode Source System Generated

Latitude 37.53071

Longitude -122.262554

Site Purpose

Select Purpose : [Set as Primary](#)

Select Purpose	Primary	Status	Remove
Mail Box		Active	

4. Select the Site Purpose region to:

- Add new purposes to this site.
- Change a record to primary purpose.
- Change the status for any of the purpose records.

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

5. Select Apply to save your work.

6. Select the Associations tabbed region to edit information in the follow areas: Entities, Trade Areas, Cluster, Hierarchies, and Relationships. Some regions appear depending on the values entered when the record was created.

- The Entities and Relationship sections appear if a legal entity is specified.
- Location information appears if a location is associated with Oracle Property Manager records.
- If Oracle Trading Community Architecture is used to capture customer relationships, you can select values in the Relationships section.

7. In the Entities region you can:

- Associate existing property location values to your site by selecting a value in the Location field.

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

- Associate an Inventory Organization value to the site.

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

The screenshot shows the Oracle Property Manager interface with the 'Associations' tab selected. The 'Entities' section contains two input fields: 'Location' with the value 'BL.005.005' and 'Inventory Organization' with the value 'E3'. To the right, the 'Property' section shows 'Organization Name' as 'Vision Industries'. Below this, the 'Trade Areas' section displays the address '500 Oracle Parkway, REDWOOD CITY, CA 94065'. It includes a 'Select Trade Area Group' dropdown set to 'Set As Primary' and a 'Select Trade Area Group Primary Status' dropdown set to 'Active'. There is also a 'Remove' button. Below the 'Trade Areas' section is the 'Clusters' section, which has a table with one row: 'Big Bazaar'. There are 'Add Another Row' buttons at the bottom of both the 'Trade Areas' and 'Clusters' sections.

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

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

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

Parent Site fields.

Note: You cannot delete existing clusters and hierarchies, but can inactivate the dates on the records. See: Viewing Site Hierarchies, page 6-2, and Viewing and Creating Site Clusters, page 5-39

The screenshot displays two sections of the Oracle Site Hub interface. The top section, titled 'Hierarchies', contains a table with columns: Hierarchy, Parent Node, Parent Site, and Remove. The 'Hierarchy' column has a dropdown menu with 'Unit Hierarchy' selected. The 'Parent Node' and 'Parent Site' columns have search icons. The 'Remove' column has a delete icon. Below the table is an 'Add Another Row' button. The bottom section, titled 'Relationships', contains a table with columns: *Customer, *Relationship Role, *Start Date, End Date, Comments, and Remove. The first row of the table shows 'No results found.' Below the table is an 'Add Another Row' button.

Hierarchy	Parent Node	Parent Site	Remove
Unit Hierarchy			

Add Another Row

*Customer	*Relationship Role	*Start Date	End Date	Comments	Remove
No results found.					

Add Another Row

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

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

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

11. Select Apply to save your work.
12. Select the Attributes tabbed region to modify details for attribute pages. Select a value in the Entity box—choices are Site, Location, or Trade Area.
13. Choose a value in the Page box.

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

15. Enter the appropriate information for the Attribute Page.

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

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

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

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

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

- View Removed to navigate to the Contacts: View Removed Addresses page. This page displays old addresses that were associated with the site in the past,

but have been removed.

- Create to navigate to the Contacts: Create Address page to create another address.
- Map to view the Site Map page for this site, see: Viewing Site Information, page 5-10
- Update to navigate to the Contacts: Update Address to modify the address.

Basic Information Associations Attributes Contacts Attachments Assets

Addresses

View Removed Create

Address	Country	Identifying	Purpose	Map	Update	Remove
700 N Michigan Ave, CHICAGO, IL 60616	United States		Mail			

Phone

Purpose	Type	Country Code	Area Code	Number	Ext
Business	Telephone	1	650	506-5000	

Add Another Row

Email Addresses

Create

Email	Primary	Purpose	Preferred	Update	Remove
No results found.					

URLs

Create

URL	Primary	Purpose	Preferred	Update	Remove
No results found.					

Person

*Customer	*Relationship Role	*Start Date	End Date	Comments	Remove
A BLAKE	Clinical Trial Investigator	25-Sep-2008			

Add Another Row

18. Select the Phone region to add, update, or remove phone number details including:
 - Purpose—such as business, home, or emergency
 - Type—such as telephone, mobile, or fax machine
 - Country Code
 - Area Code
 - Number
 - Extension
19. Select the Email Addresses region to add, update, or remove e-mail addresses. Details display in fields for Email, Primary, Purpose, and Preferred.

20. Select Create to navigate to the Contacts: Create Email Address page to add new e-mail records. Select information in the following fields:
 - Purpose—such as business, emergency, or personal
 - Format—choices are HTML mail, Plain text mail, and Text mail with HTML attachment
 - Email—the unique e-mail address
 - Status—choices are Active or Inactive
 - Primary—flag indicating if this is the primary e-mail address
21. Select the URL region to add, update, or remove website addresses. Details display in fields for URL, Primary, Purpose, and Preferred.
22. Select Create to navigate to the Contacts: Create Website page to add new website address records. Select information in the following fields:
 - Purpose—such as Homepage or Support
 - Format—such as Hypertext Transfer Protocol or E-mail
 - URL—Uniform Resource Locator specifying identified resource and the protocol for retrieving it
 - Status—choices are Active or Inactive
 - Primary—flag indicating if this is the primary website address
23. Select the Person region to add, update, or remove customer contact information that is stored in your TCA application. The following fields display and can be modified:
 - Customer
 - Relationship Role
 - Start and End Dates
24. Select Apply to save your work.
25. Select the Attachments tabbed region to add or modify attachment records for this site.

This region provides the ability to display attached documents, URLs, text, and other items pertaining to this site—and enables you to select:

- Criteria in the Search region to filter the list of attachments
- Add Attachment to navigate to the Add Attachment to add more records, see: *Using Attachments, Oracle Applications User's Guide*
- The record in the Title field to open the attachment
- Update to navigate to the Update Attachment: page to modify details
- Delete to remove the record
- Publish to Catalog icons to publish to the document catalog as a standard type document

Basic Information Associations Attributes Contacts Attachments Assets

Attachments

Search

Note that the search is case insensitive

Title

[Show More Search Options](#)

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
HQ Redwood Shores Campus Map(http://my.oracle...)	Web Page	HQ Redwood Shores Campus Map Link	Miscellaneous MFG		25-Aug-2008	One-Time			
HQ Redwood Shores	File	HQ Redwood Shores	Miscellaneous MFG		25-Aug-2008	One-Time			

26. Select Apply to save your work.

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

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

Basic Information Associations Attributes Contacts Attachments Assets						
Search Note that the search is case insensitive Item Description <input type="text"/> Item <input type="text"/> <input type="button" value="Go"/> <input type="button" value="Clear"/>						
Item Description	Item	Item Instance	Serial Number	Status	Quantity	Start Date
Multimeter Replacement Battery	Alkaline Battery - Multimeter	4118887		CREATED	1	02-Oct-2009

To update values in this region, see: [Creating Site Assets](#), page 5-48

Copying Attribute Groups

When you are creating new sites from existing sites (copying, templates, or importing), you can copy attribute groups by choosing **Select Attribute Groups for Copy** from the **Site Creation: Basic Information** page. All available attributes groups from the selected templates, based on the purpose and country specified, are listed on this page.

To copy attribute groups:

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

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

ORACLE Site Management

Home Sites Hierarchies Clusters

Site Search | Template Search

Sites: Sites > Sites > Create Site > Create Template: Template Selection > Create Site: Basic Information >

Basic Information: Copy Attribute Groups

Cancel Apply

Sequence Number	Name	Remove
1	1000	lv

Available Attribute Groups

Selected Attribute Groups

Multirow Support
Hours of Operation
Pseudo
Store Information Management
Milestone
Special Facilities
Staffs
Operating Hours

Move
Move All
Remove
Remove All

Cancel Apply

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

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

Comparing Sites

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

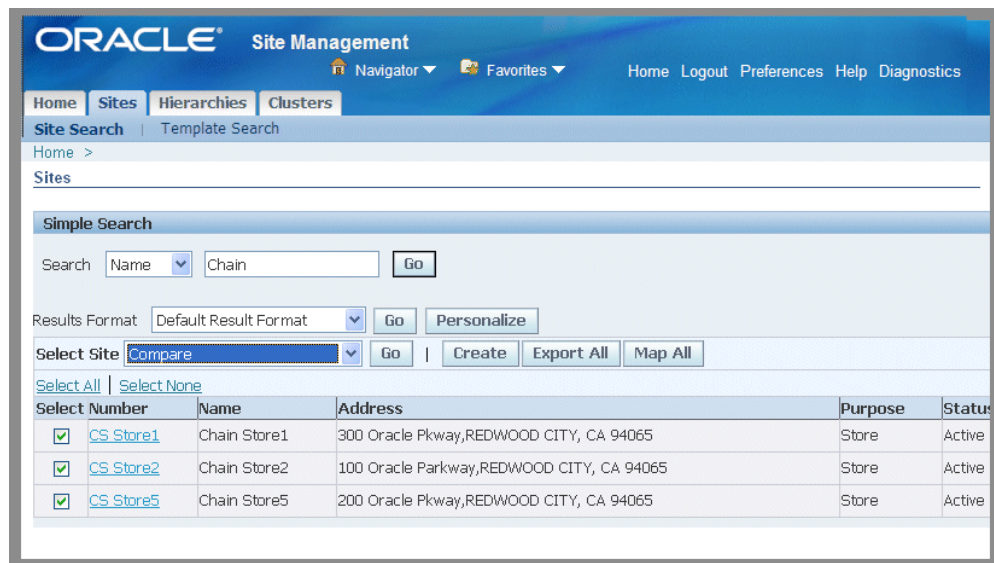
To compare two or more sites:

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

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

2. Select the appropriate records from the results of your search, and select Compare in the Select Site box.

You must select at least two records, and can select up to 5 site records.



The screenshot displays the Oracle Site Management interface. At the top, there's a navigation bar with 'ORACLE Site Management' and links for Navigator, Favorites, Home, Logout, Preferences, Help, and Diagnostics. Below this is a sub-navigation bar with 'Home', 'Sites', 'Hierarchies', and 'Clusters'. The 'Sites' section is active, showing 'Site Search' and 'Template Search' options. The 'Simple Search' section has a search bar with 'Name' selected and 'Chain' entered, with a 'Go' button. Below the search bar, there's a 'Results Format' dropdown set to 'Default Result Format' and a 'Personalize' button. The 'Select Site' dropdown is set to 'Compare', with 'Go', 'Create', 'Export All', and 'Map All' buttons. Below this, there are links for 'Select All' and 'Select None'. The main table displays search results with columns: Select Number, Name, Address, Purpose, and Status. Three records are shown, all with checkboxes selected:

Select Number	Name	Address	Purpose	Status
<input checked="" type="checkbox"/> CS_Store1	Chain Store1	300 Oracle Pkway, REDWOOD CITY, CA 94065	Store	Active
<input checked="" type="checkbox"/> CS_Store2	Chain Store2	100 Oracle Parkway, REDWOOD CITY, CA 94065	Store	Active
<input checked="" type="checkbox"/> CS_Store5	Chain Store5	200 Oracle Pkway, REDWOOD CITY, CA 94065	Store	Active

3. Select Go to display the View Comparisons page.

ORACLE Site Management

Home Sites Hierarchies Clusters

Site Search | Template Search

Home > Sites >

View Comparisons

Entity: Page:

Attribute Groups

[Expand All](#) | [Collapse All](#)

Focus Name	CS Store1	CS Store2	CS Store5
<input type="checkbox"/> Root Node			
<input type="checkbox"/> Primary			
Address	300 Oracle Pkway, REDWOOD CITY, CA 94065	100 Oracle Parkway, Redwood City, CA 94065	200 Oracle Pkway, REDWOOD CITY, CA 94065
Site Number	CS Store1	CS Store2	CS Store5
<input type="checkbox"/> Manager			
Dynamic URL			
Job Grad	E4	E5	E5
Name	John Smith	B. LARKIN	CAL. GRANT

[Return to Sites](#)

4. In the View Comparisons region, select a value in the Entity field. Your choices are Site, Location, and Trade Area.
5. Select a record in the Page field for the pages created for the entities.
6. Select Go to display the attribute values for each site record. The attributes are displayed in a table on this page.

Viewing and Creating Site Clusters

Site Hub provides the ability to group sites with shared characteristics into clusters, in a grouping at one level only. For example, you can create a cluster of sites with a specific annual revenue range and size. You have the ability to add site records as you create and modify a cluster record. You can also access the Add to Cluster page to add sites directly from the Simple Search and Advanced Search pages.

Note: If role based access security is implemented, users must have view privilege in order to view and add sites to cluster records.

To view existing site clusters:

1. Navigate to the Clusters page.
2. In the Simple Search region, you have the choice to search for records using Name and Description criteria. You can also enable the My Clusters check box to display

records selected in the Manage My Clusters page under your login information.

3. Select Go to display the results in the table.

ORACLE Site Management

Home | Sites | Hierarchies | **Clusters**

Simple Search

Note that the search is case insensitive

Name

Description

☒ My Clusters

Select Clusters : |

[Select All](#) | [Select None](#)

Select Name	Description	Start Date	End Date	Update
<input type="checkbox"/> API_CLUSTER		23-Sep-2009		
<input type="checkbox"/> Big Bazaar	Big Bazaar Outlets	25-Nov-2008		
<input type="checkbox"/> Franchise	Retail store clusters	02-Oct-2009		
<input type="checkbox"/> RRS6_Cluster	Cluster	25-Sep-2009		
<input type="checkbox"/> rg534	rg534	20-Sep-2009		

This page enables you to select:

- Add to My Clusters to select records to add to your favorites list
- Create to navigate to the Create Cluster page to create a new record
- A name record to navigate to the View Cluster page
- Update to navigate to the Update Cluster page

4. Select a record in the Name column to display the View Cluster page.

This page displays information in fields for Name, Description, and Start and End Dates.

Summary information for the sites attached to this cluster appear in the table in fields for Site Number, Name, Address, Status, Primary Use, and Creation Date.

ORACLE Site Management

Home | Sites | Hierarchies | Clusters

Clusters >

View Cluster: Franchise

* Indicates required field

Name: **Franchise** Start Date: **02-Oct-2009**

Description: **Retail store clusters** End Date:

Sites Included

Select Sites: Compare [v] Go | Export Map All

[Select All](#) | [Select None](#)

Site Select Number	Name	Address	Status	Primary Use	Creation Date
<input type="checkbox"/> Retail007	Big Bazaar 001	33 KEARNY STREET, SAN FRANCISCO, CA 94108	Active	Retail Show Room	25-Nov-2008
<input type="checkbox"/> Retail008	Big Bazaar 002	757C BEACH STREET, SAN FRANCISCO, CA 94109	Active	Retail Show Room	25-Nov-2008
<input type="checkbox"/> Retail010	Big Bazaar 004	555 GRANT AVENUE, SAN FRANCISCO, CA 94108	Active	Retail Show Room	25-Nov-2008
<input type="checkbox"/> Retail002	Pantaloen Retail 002	1717 HARRISON STREET, SAN FRANCISCO, CA 94103	Active	Retail Show Room	25-Nov-2008

[Return to Clusters](#)

5. Inclusive for all site records displaying in the table, you can select the following actions:
 - Export to export records to a spreadsheet, see: Creating Sites Using the Export and Import Function, page 5-25
 - Map All to display all sites on the Site Map page, see: Viewing Site Information, page 5-10
6. Select one or more records in the table to perform the following actions:
 - Compare, see: Comparing Sites, page 5-38
 - Create Asset, see: Creating Site Assets, page 5-48
 - Create Inventory Organization, see: Creating and Assigning Inventory Organizations to Sites, page 5-50
 - Create Property Location, see: Creating Property Locations for Sites, page 5-49
 - Map Sites, see: Viewing Site Information, page 5-10

To create site clusters:

1. Navigate to the Create Cluster page.
2. Enter a value in the Name field. Optionally; you can enter a value in the Description field.

3. In the Start and End Date fields, you have the option to select dates to activate or inactivate this record.
4. Select Add Sites to access the Sites Search page to add site records to this cluster. Choose the sites you want in this cluster, and select Add.
They appear in the Sites Included region.
5. Select Apply to save your work.

To update site cluster records:

1. Navigate to the Update Cluster page for the cluster record selected.
This page displays cluster name and description values; summary information for associated sites appears in a table.
2. You can modify the site cluster values in any of the following fields:
 - Name
 - Description
 - Start and End Dates
3. If there are sites associated with the cluster record, you can remove sites by selecting records in the table, and select Remove from Cluster.
4. Select Add Sites to access the Sites Search page to add site records to this cluster. Choose the sites you want in this cluster, and select Add.
They appear in the Sites Included region.
5. Select Apply to save your work.

To add sites to a cluster:

1. Navigate to the Simple Search or Advance Search page, and search for applicable records.
2. Select site records, and choose Add to Cluster in the Actions box.
3. Select Go to display the Add to Cluster page.

The records selected appear on the page in the Selected Sites region.

The screenshot shows the Oracle Site Management interface. The top navigation bar includes 'Home', 'Logout', 'Preferences', 'Help', and 'Diagnostics'. The main navigation area has tabs for 'Home', 'Sites', 'Clusters', 'Hierarchies', and 'Templates'. The 'Sites' tab is active, and the breadcrumb trail is 'Sites: Sites > Sites >'. The page title is 'Add To Cluster'. There are 'Cancel' and 'Apply' buttons at the top right. Below this is a 'Select Cluster' section with a search field labeled '* Cluster Name' containing 'Vision HQ' and a magnifying glass icon. The 'Selected Sites' section contains a table with the following data:

Site Number	Name	Address	Status	Primary Use	Creation Date
CA95054-001	Vision Santa Clara	5450 Great America Parkway, SANTA CLARA, CA 95054	Active	Corporate Office Site	19-Aug-2008
CA94588	Vision HQ Pleasanton	4433 Oracle Lane, PLEASANTON, CA 94588	Active	Corporate Office Site	19-Aug-2008
CA94065-001	Vision Headquarters	500 Oracle Parkway, REDWOOD CITY, CA 94065	Active	Corporate Office Site	19-Aug-2008

At the bottom right of the table are 'Cancel' and 'Apply' buttons.

4. Select the cluster in the Cluster Name field.
5. Select Apply to save your work.

Viewing and Creating Site Templates

Site templates enable you to create models representing a range of possible site configurations used in site creation. Once created, you can update and modify these templates.

To view site templates:

1. Navigate to the Templates page.
2. In the Simple Search region, you can search for records using criteria in the Name and Number fields.

3. Select Go.

The results of your search appear in a table with the following information summary information for each record: Number, Name, Country, Created By, Creation Date, Start and End Dates

This page enable you to select a record to view, update, or delete the template.

4. Select a record in the Number field to navigate to the View Template page.

The template information displays in tabbed regions for Basic Information, Attribute Groups, and Attribute pages.

5. You can modify template data by selecting Update for a record.

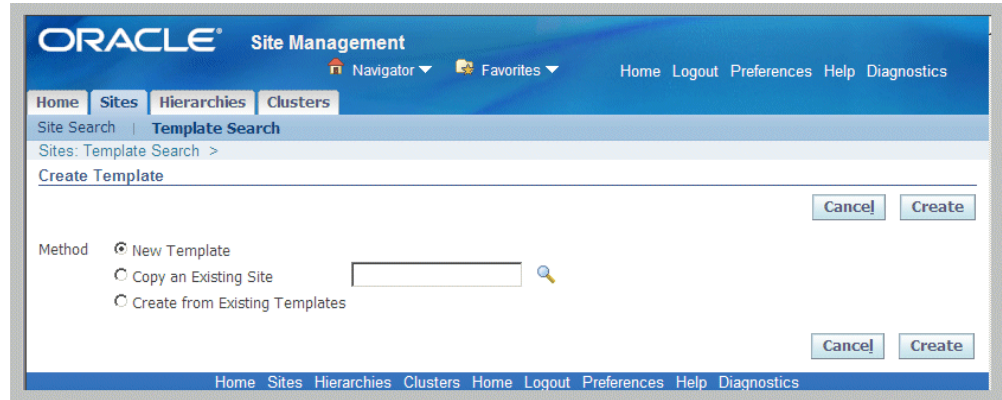
Update Template page appears with the template information displaying in the tabbed regions for Basic Information, Attribute Groups, and Attribute pages. Change the appropriate information.

6. Select Apply to save your work.

To create a site template:

1. Navigate to the Templates page.
2. Select Create to display the Create Template page.

Three methods are provided to create templates: New Template, Copy an Existing Site, and Create from Existing Templates.



3. Select a method to enter new site details for your template:
 - New Template—displays the Create Template: Basic Information page for entering site details for your template.
 - Copy an Existing Site—displays the Create Template: Basic Information page with details from the site you selected to copy.
 - Create from Existing Templates—displays the create Template: Template Selection page to choose a template for copying information.
4. If you choose either the New Template or Copying an Existing Site methods, select Create.
 The Create Template: Basic Information page appears.
5. If you choose the Create from Existing Templates method, select Create to display the Template: Template Selection page.
 Select a value in the Country field, and Add Another Row in the Templates region. Select a template record from the list values.
 Select Continue to display the Create Template: Basic Information page.
6. Enter unique values for the Name and Number fields, optionally enter data in the Descriptions and Start and End Date fields.
7. In the Site Information region, you must enter or use the defaulted value in the Country of Primary Residence, and optionally you can select details in the following fields:
 - Type
 - Legal Entity
 - Brand Name

- Calendar
- Country of Primary Address
- Status

Note: For more information about the fields on this page, see:
Creating Sites, page 5-15

Home Logout Preferences Help Diagnostics

Home Sites

Sites | Clusters | Hierarchies | **Templates**

Sites: Templates > Create Template >

Create Template: Basic Information

* Indicates required field

* Number Site Template

* Name New Site Template

Description template for creating

Start Date (example: 23-Sep-2008)

End Date

Cancel Save Continue

Site Information

Type Internal

Legal Entity Vision Industries

* Country of Primary Address United States

Brand Name

Calendar

Status Active

Site Purpose

Purpose	Status	Remove
Corporate Office Site	Active	

Add Purpose

Cancel Save Continue

8. In the Site Purpose region, you can select a purpose for this site to specify the function used for the site. Purposes are required for creating attribute pages.
9. Select Save to save your record; or select Continue to add detail information on the Create Template: Detail Information page.
10. If you selected Continue, the Create Template: Detail Information page appears. In the Attributes Group tab, if you added site purpose records and attributes are assigned to those records, they appear in the Available Attributes box.

ORACLE Site Management

Home | Sites | Hierarchies | Clusters

Sites: Templates > Create Template > Create Template: Basic Information >

Create Template: Detail Information

Number: Site Template
Name: New Site Template
Description: template for creating

Start Date: _____
End Date: _____

Attribute Groups | Attributes

Select Attribute Groups to be enabled for the Template

Available Attribute Groups: _____

Enabled Attribute Groups:

- Tenure Information
- Projects
- Parking
- Lease Rights & Obligations
- Lease Information
- Shipping Hours
- Receiving Hours

Buttons: Move, Move All, Remove, Remove All

Buttons: Cancel, Back, Finish

Use the Arrow tools to move or remove records between the Available and Selected boxes. See: Site, Location, and Trade Area Attributes, page 4-3

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

ORACLE Site Management

Home | Sites | Hierarchies | Clusters

Sites: Templates > Create Template > Create Template: Basic Information >

Create Template: Detail Information

Number: Site Template
Name: New Site Template
Description: template for creating

Start Date: _____
End Date: _____

Attribute Groups | Attributes

TIP Please click Go to refresh the Attribute Groups data after selecting the Attribute Page

Entity: Site Page: Customer Page Go

Buttons: Cancel, Back, Finish

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

Attribute Groups | **Attributes**

✓TIP Please click Go to refresh the Attribute Groups data after selecting the Attribute Page

Entity: Site | Page: Customer Page | Go

Customer

Customer Name	Customer Address	Customer Phone Number	Customer Type	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Add Another Row

Cancel | Back | Finish

13. Select Finish to save your work.

Creating Site Assets

Site Hub provides the ability to associate sites with Oracle Enterprise Asset Management (eAM) assets and equipment. For internal sites with an assigned legal entity—you have the ability to track maintenance, performance, costs, and work history for your site assets. Asset groups enable you to define eAM assets and their characteristics that are inherited by the assets belonging to that group. Assets are visible in the View Site and Update Site pages.

To add asset instances to your site:

1. On the Sites page, select one or more site records and navigate to the Create Asset Instances page.
2. Select a value in the Maintenance Organization field.

This field identifies the eAM maintenance organization associated with the production organization.

ORACLE Site Management

Home | **Sites** | Hierarchies | Clusters

Site Search | Template Search

Sites: Site Search > Sites >

Information
Assets can only be assigned to internal sites that has a legal entity associated with it. External sites and Internal sites without a legal entity are excluded from the selected sites list below.

Create Asset Instances
* Indicates required field
When instance of an asset group already exists for a selected site and an instance of the same asset group is also a part of the selected asset structure, then check 'Create Additional Instances' to create additional asset instances of that asset.

* Maintenance Organization

* Asset Structure

☐ Create Additional Instances

Selected Sites

Site Number	Name	Address	Status	Primary Use	Creation Date
M60616-001	Walker Point Mall	700 N Michigan Ave, CHICAGO, IL 60616	Active	Mall	19-Aug-2008

Cancel Apply

3. Select a value in the Asset Structure field.
An asset structure is a hierarchy of the parent asset and its component child assets.
4. Enable the Create Additional Instances check box to create additional asset instances if the specified site has existing assets from the same asset group.
5. Select Apply to save your work.

Related Topics

Defining Asset Groups, *Oracle Enterprise Asset Management User's Guide*

Creating Property Locations for Sites

You have the ability to set up property location information for your sites if you have installed Oracle Property Manager, and the site has a legal entity specified. This information appears in the Associations tabbed region of the site record, the Entities section. Location information appears if a site location is associated with Oracle Property Manager records.

To create property locations for your site records:

1. On the Sites page, select site records and navigate to the Create Property Locations page.
2. Enter a valid record in the Operating Unit field associated to this property.
3. Select a value in the Tenure field for this property. Your choices can include Leased,

Managed, Mixed, or Owned.

The screenshot shows the Oracle Site Management interface. At the top, there's a navigation bar with 'Home', 'Sites', 'Hierarchies', and 'Clusters'. Below this, a breadcrumb trail shows 'Sites: Site Search > Sites >'. The main heading is 'Create Property Locations'. A note states '* Indicates required field'. The form includes fields for 'Operating Unit' (set to 'Vision Operations'), 'Tenure' (set to 'Leased'), and 'Location Type' (set to 'Building'). There are 'Cancel' and 'Apply' buttons. Below the form is a section titled 'Selected Sites' with a note: 'Only Sites that do not have a Property Location associated with them are displayed below.' It contains a table with columns: Site Number, Site Name, Name, Alias, Property, Start Date, and UOM. One row is visible for Site Number MA02116-3321, Site Name Boston Manufacturing M2, with empty input fields for Name, Alias, Property, and Start Date. The UOM is set to 'Square Feet'. 'Cancel' and 'Apply' buttons are at the bottom right.

Site Number	Site Name	Name	Alias	Property	Start Date	UOM
MA02116-3321	Boston Manufacturing M2	*	*			Square Feet

4. Select a Location Type value. Choices are Building, Floor, Office, Land, Parcel, and Section.
5. Enter values in the Name and Alias fields.
6. Optionally, you can select a Property record and Start Date values.
7. Select a unit of measure for valuating this property, such as square feet or monetary units.
8. Select Apply to save your work.

Creating and Assigning Inventory Organizations to Sites

You have the ability to create inventory organizations for the sites by copying the organization definition from a model or existing inventory organization. Existing organization data serves as a template. This also enables you to copy other organization specific data such as shipping networks, hierarchy assignments, bills of material, routings, items and item attributes from the model organization.

To create an inventory organization for a site:

1. Select site records and navigate to the Create Inventory Organizations page.
Only selected sites that do not already have an associated inventory organization display in the Selected Site region.
2. Select a valid organization in the Model Organization field.

ORACLE Site Management

Home | Sites | Hierarchies | Clusters

Site Search | Template Search

Sites: Site Search > Sites >

Create Inventory Organizations

Only sites that do not have an inventory org associated with it will be included in the exported file. Select the copy parameters and the filter criteria for copying of items and BOMs

Model Organization:

☒ Copy Items
☒ Copy BOM
☒ Copy Routing
☒ Validate Items

☒ Copy Shipping Network
☒ Assign to Existing Hierarchies
☒ Purge

Selected Sites

Site Number	Site Name	Organization Code	Organization Name
CA94588	Vision HQ Pleasanton	<input type="text"/>	<input type="text"/>
CA95054-001	Vision Santa Clara	<input type="text"/>	<input type="text"/>

Cancel Submit

3. You have the option to copy or modify the following definition elements from the existing organization. Enable or disable the check boxes for the following definitions:
 - Copy Items
 - Copy BOM
 - Copy Routing
 - Validate Items
 - Copy Shipping Network
 - Assign to Existing Hierarchies
 - Purge
4. For the select sites, enter values in the Organization Code and Organization Name fields.
5. Select Submit to generate new records.

Related Topics

Copying Inventory Organizations, *Oracle Inventory User's Guide*

Site Hierarchies

This chapter covers the following topics:

- Overview of Site Hierarchies
- Viewing Site Hierarchies
- Creating Hierarchies
- Using the Hierarchy Workbench

Overview of Site Hierarchies

Hierarchies are a tree representation of sites, grouped for common characteristics at several levels. This logical grouping aids in viewing and enables you to drill down to view the site details. You can create hierarchical structures for your sites according to both site and hierarchy purposes and attributes. The hierarchy functionality in Site Hub provides for organizations with a large number of sites to create relationship roles between sites.

The Hierarchy Workbench enables an easy and intuitive way to manage hierarchies, their nodes, and associated sites. You can:

- Access editing functions for hierarchies in one interface
- View and create parent and child relationships between sites in the hierarchy
- Add site records to the hierarchy
- Create new nodes on the hierarchy structure

Related Topics

[Viewing Site Hierarchies, page 6-2](#)

[Defining Hierarchy Relationship Rules, page 4-52](#)

Creating Hierarchies, page 6-5

Using the Hierarchy Workbench, page 6-7

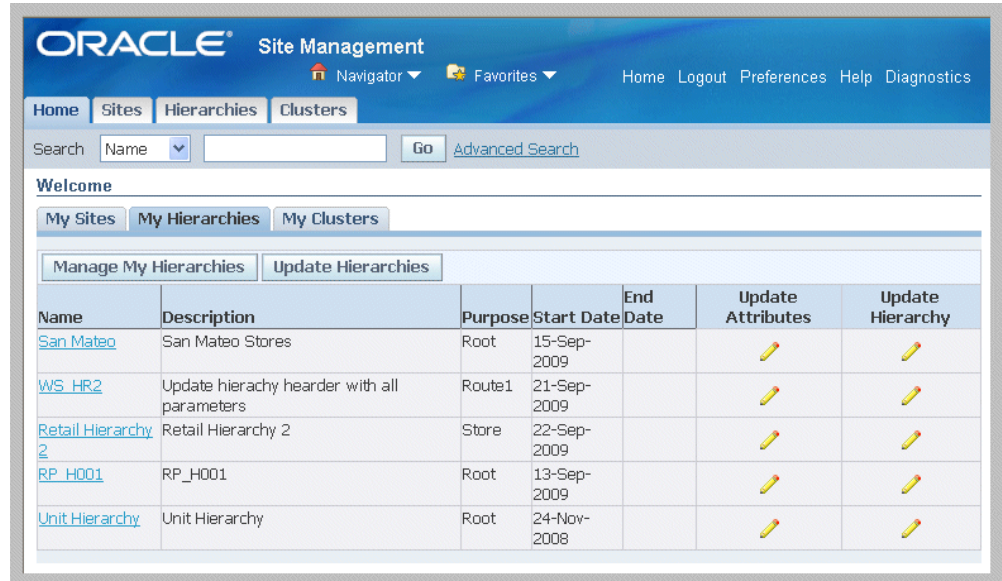
Viewing Site Hierarchies

Site Hub enables you to search and view hierarchies in a number of places:

- My Hierarchies tabbed region on the Site Management User Home region
Records appearing in this region are selected in the Manage My Hierarchies page for those hierarchies you frequently access.
- Hierarchies tabbed region of the Site Management User workbench
This tabbed region displays the Hierarchies Simple Search page where you can navigate to pages to view, create, and update hierarchy records.
- Hierarchy Workbench
You can navigate to the Hierarchy Workbench and perform searches directly on the workbench.

To access records on the My Hierarchies page:

1. Navigate to the My Hierarchies page.
The hierarchies you have identified as My Hierarchies appear on this page.



2. This page enables you to select:

- Manage My Hierarchies to choose your default record display. These records display on the My Hierarchies page, and when you enable the My Hierarchies check box on the Hierarchies page. See: Managing Favorites, page 5-2
- Update Hierarchies to navigate and display all records on this page on the Hierarchy Workbench for editing. See: Using the Hierarchy Workbench, page 6-7
- Hierarchy Name link to navigate to the View Hierarchy page.
- Update Attributes to navigate to the Update Hierarchy page for a specific record.
- Update Hierarchy to navigate and display a specific record on the Hierarchy Workbench. See: Using the Hierarchy Workbench, page 6-7

To view site hierarchies on the Hierarchy tabbed region:

1. Navigate to the Hierarchies page.
2. In the Simple Search region—enter search criteria values in Name, Description, or Purpose fields.

You also have the option to select the My Hierarchies check box to display the Favorites records, see: Searching for Information, page 5-3

3. Select Show More Search Options to display search criteria fields for dates and

status.

Note: The hierarchy search function is designed to search either by date or status, not both values simultaneously.

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

ORACLE Site Management

Home Sites Hierarchies Clusters

Hierarchy Search | Hierarchy Workbench

Hierarchies

Advanced Search

Simple Search

Note that the search is case insensitive

Name Purpose

Description ☒ My Hierarchies

[Show More Search Options](#)

Go Clear

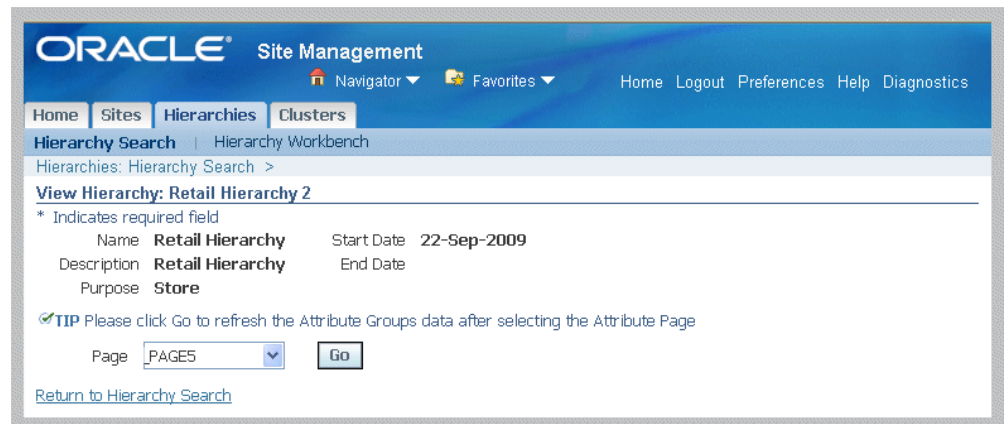
Select Hierarchies : [Update Hierarchy](#) [Add to My Hierarchies](#) | [Create](#)

[Select All](#) | [Select None](#)

Select	Name	Description	Purpose	Start Date	End Date	Update Attributes	Update Hierarchy
<input type="checkbox"/>	RP_H001	RP_H001	Root	13-Sep-2009			
<input type="checkbox"/>	Retail Hierarchy 2	Retail Hierarchy 2	Store	22-Sep-2009			
<input type="checkbox"/>	San Mateo	San Mateo Stores	Root	15-Sep-2009			
<input type="checkbox"/>	Unit Hierarchy	Unit Hierarchy	Root	24-Nov-2008			

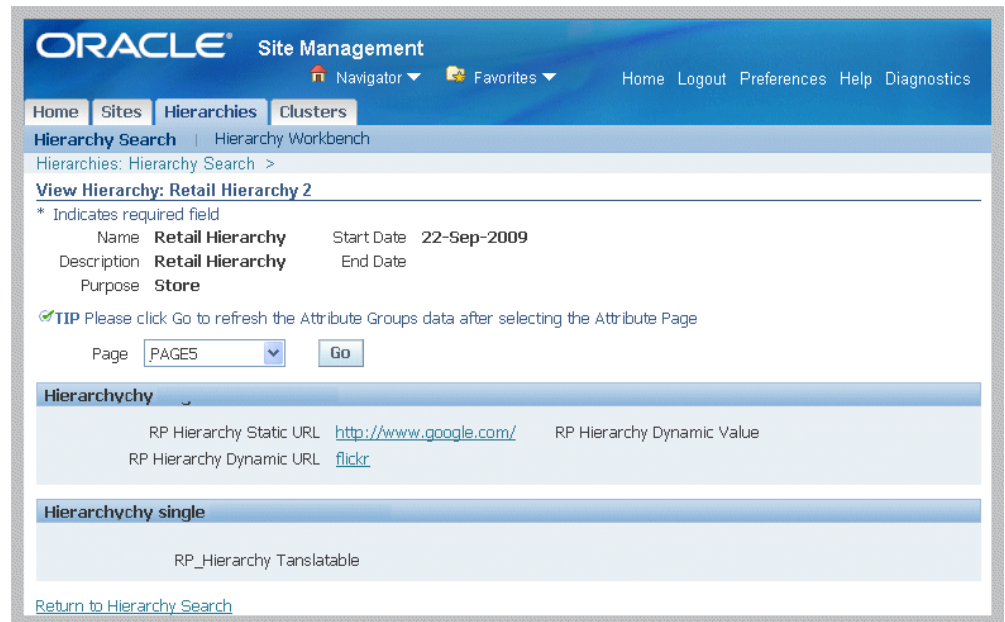
5. The Hierarchies page enables you to select:
 - Create to navigate to the Create Hierarchy: Enter Basic Information page for defining new records, see: Creating Hierarchies, page 6-5
 - Update Hierarchies to navigate and display all records on this page on the Hierarchy Workbench for editing. See: Using the Hierarchy Workbench, page 6-7
 - Add to My Hierarchies to add a record to your favorites list, see: Managing Favorites, page 5-2
 - Update Attributes to navigate to the Update Hierarchy page for a specific record.
 - Update Hierarchy icon to navigate to the Hierarchy Workbench for editing an individual record, see: Using the Hierarchy Workbench, page 6-7

- Hierarchy Name link to navigate to the View Hierarchy page.
6. Select the Name link for a record.



On the View Hierarchy page the hierarchy record details display such as Name, Description, Purpose, Start and End Dates, and associated attribute pages.

7. Select a record in the Page box to view an associated attribute page. Select Go to display the page.



Creating Hierarchies

Hierarchies are a tree representation of sites, grouped at several levels. You can create hierarchical structures for your sites categorizing business purposes for both the

hierarchy and its associated sites. After creating your hierarchical structures—you can add or remove nodes and sites.

To create a site hierarchy:

1. Navigate to the Create Hierarchy: Basic Information page.
2. Enter a value in the Name field.
3. Optionally you can enter values in the Description, Purpose, and Start and End Date fields.

The screenshot shows the Oracle Site Management interface. The top navigation bar includes 'ORACLE Site Management', a 'Navigator' dropdown, a 'Favorites' dropdown, and links for 'Home', 'Logout', 'Preferences', 'Help', and 'Diagnostics'. Below this is a sub-navigation bar with 'Home', 'Sites', 'Hierarchies', and 'Clusters'. The 'Hierarchies' tab is selected, and the breadcrumb 'Hierarchies >' is shown. The main heading is 'Create Hierarchy: Enter Basic Information'. A note states '* Indicates required field'. The form contains the following fields: 'Name' (required, text input with 'Retail'), 'Start Date' (text input with '06-Oct-2009' and a calendar icon, with a note '(example: 21-Sep-2009)'), 'Description' (text input with 'Retail store structure'), 'End Date' (text input with a calendar icon), and 'Purpose' (dropdown menu with 'Store' selected). There are two sets of buttons: 'Cancel', 'Save', and 'Apply' at the top right, and another identical set at the bottom right.

4. Save your work selecting one of the following options:
 - Apply to save your record and return to the Hierarchies page.
 - Save to display the Update Hierarchy page.
5. If you have navigated to the Update Hierarchy page, and the Purpose value selected has associated attribute pages, choose a page from the drop-down list, and select Go.

ORACLE Site Management

Home | Sites | **Hierarchies** | Clusters

Hierarchies >

Update Hierarchy: Retail

* Indicates required field

* Name: Retail store Start Date: 06-Oct-2009
 Description: Retail store structure End Date: (example: 21-Sep-2009)
 Purpose: Store

TIP Please click Go to refresh the Attribute Groups data after selecting the Attribute Page

Page: rg_be_page Go

Buttons: Cancel, Update Hierarchy, Save, Apply

6. Enter data for this hierarchy record in the attribute page.
7. Save your work selecting one of the following methods:
 - Save to save this record, and continue updating this record.
 - Apply to save this record and return to the Hierarchies page.
8. If you chose Save, you can select Update Hierarchy to navigate to the Hierarchy Workbench to edit this record. See: Using the Hierarchy Workbench, page 6-7

Using the Hierarchy Workbench

The Hierarchy Workbench consists of four panes. When you navigate to the workbench by selecting hierarchy records from the search pages, they appear in the Hierarchy List pane. The records in the list can be moved to the Edit Panes as you drag and drop when performing edits on them. Associated hierarchy and site attribute details display on the Attributes pane when specific records are selected. This workbench enables you to:

- Search and add hierarchy records
- Drag and drop records for performing edits
- View assigned hierarchy and site attribute details
- Create new nodes on the structure
- Create new hierarchy records
- Add site records to the hierarchy structure
- Navigate to site records for editing

For a summary of navigation moves on the Hierarchy Workbench, see: Hierarchy Workbench Navigation, page 6-15

Role Based Access Behavior in the Hierarchy Workbench

In the Hierarchy Workbench, view privilege is required to display attributes, a lock icon appears if view privilege is not granted:

- Adding a parent to a site, or adding a child node to a site, are edits to the hierarchy —not to the site.
- If view and edit hierarchy rights are not granted, only the site name is visible and the ability to update is not available..
- If view hierarchy privilege is granted, that user or group has the ability to drag site records from that hierarchy to another hierarchy record, even if edit hierarchy privilege is not granted. You can prevent this behavior by not granting view access to users for specific hierarchies.

See: Setting Up Role Based Access Control, page 3-6, and Overview of Role Based Security Access, page 3-1

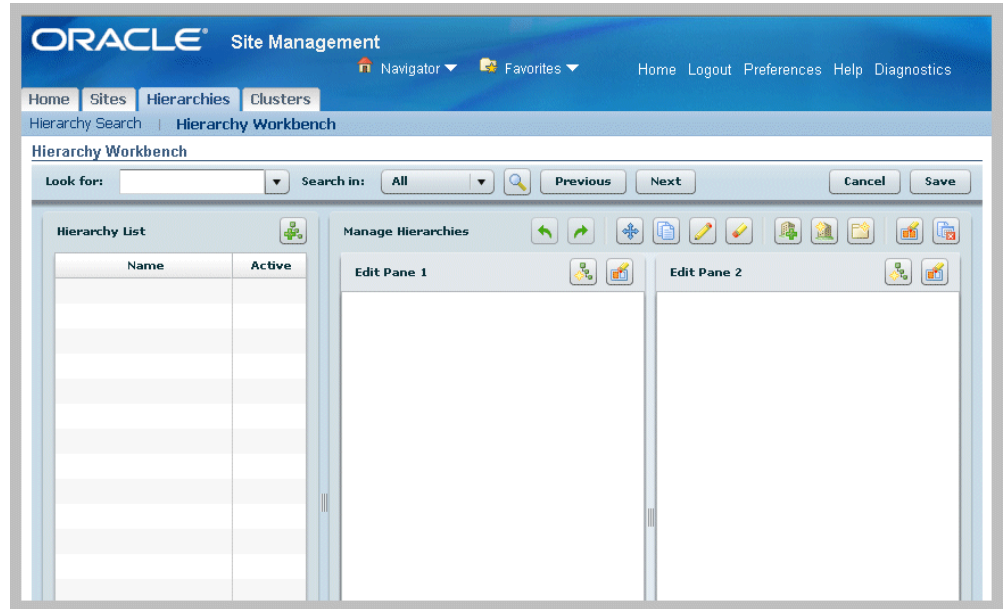
Searching on the Hierarchy Workbench:

You can search the Hierarchy Workbench for hierarchies in the Hierarchy List, sites in the Edit Panes, and Nodes in the Edit Panes:

- The search can be filtered by selecting a value in the Search in box for All, Hierarchy List, Edit Pane 1, or Edit Pane 2.
- You can move up or down the list of records selecting Previous and Next.

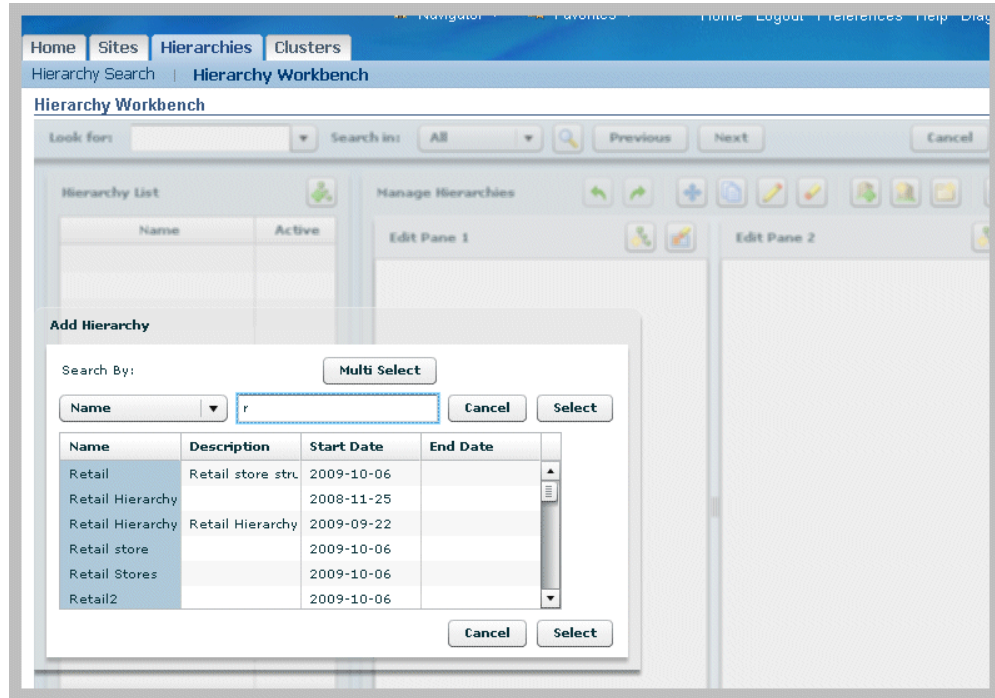
To add hierarchy records on the Hierarchy Workbench:

1. Navigate to the Hierarchy Workbench.
2. Select the Add Hierarchy icon in the Hierarchy List pane.

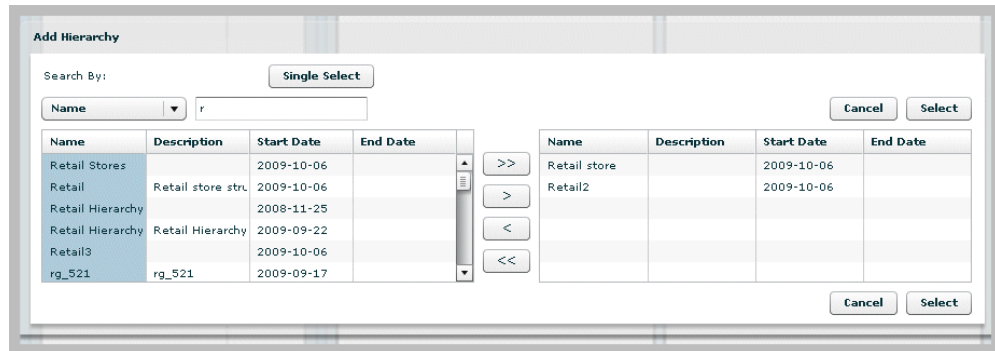


The Add Hierarchy search box appears.

3. Select a Search By value, choices are Name or Description. Enter search criteria.
The applicable values automatically display.



4. Select a record and choose Select to display it on the Hierarchy Workbench.
5. You have the option to select multiple records. Choose Multi Select to display a toggle box. Select:
 - Move All arrow to select all the records displayed
 - Move arrow to select individual records



6. Choose Select to display records on the Hierarchy Workbench.
- See: Hierarchy Workbench Navigation, page 6-15

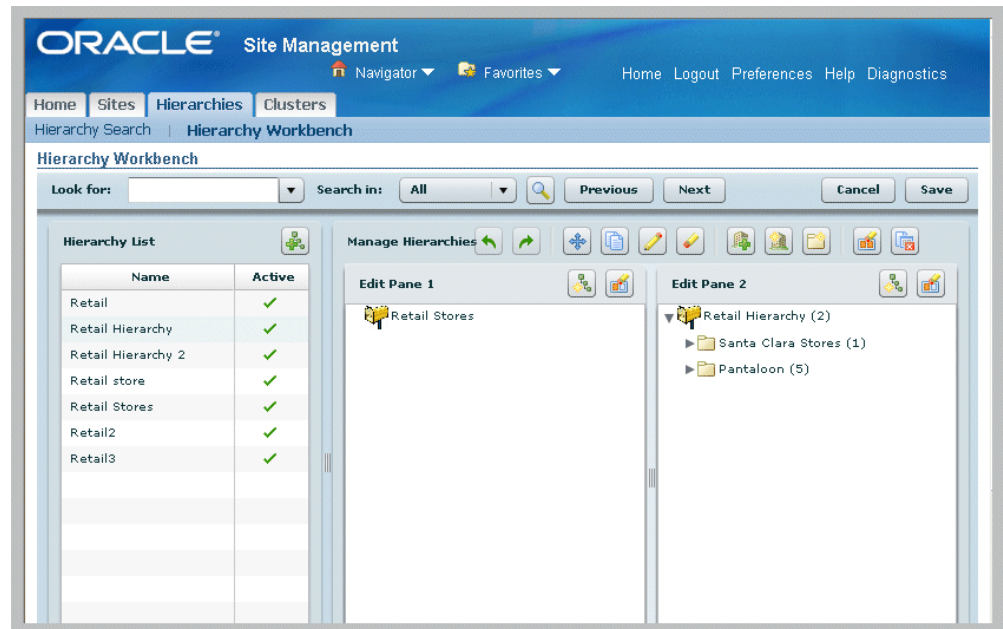
To search for a hierarchy element on the hierarchy workbench:

1. On the Hierarchy Workbench, enter a value in the Look for box.
2. Choose a value in the Search in box. Choices are All, Hierarchy List, Edit Pane 1, or Edit Pane 2.
3. Select Find, Previous, or Next to search for records.

To move records on the Hierarchy Workbench:

1. Select a record on the Hierarchy List pane by left-clicking the record with your mouse.
2. Drag and drop the record to one of the edit panes.

Repeat this action as required with the records you want to display.



3. Drag and drop records from one pane to the other pane as needed. You can also:
 - Move an element of the hierarchy from one edit pane to the other.
 - Set up rules to define constraints on what moves are allowed. See: Defining Hierarchy Relationship Rules, page 4-52
 - Use control drag and drop to copy elements from one hierarchy to another.
4. After selecting records from your search results, the Hierarchy Workbench enables

you to update data by selecting records and choosing:

- Add Site, page 6-13: To add sites to a hierarchy
- Create Site, page 5-15: To create a new site record to add to the hierarchy
- Create Node, page 6-14: To add new nodes to a hierarchy
- Create Hierarchy, page 6-5 To create a new hierarchy record
- Update, page 5-29: To edit the site records
- Clear Both Edit Panes: To remove records from both edit panes
- Clear Edit Pane: To remove records from one edit pane

See: Hierarchy Workbench Navigation, page 6-15

Note: Role Based Access Behavior in the Hierarchy Workbench

If view hierarchy privilege is granted, that user or group has the ability to drag site records from that hierarchy to another hierarchy record, even if edit hierarchy privilege is not granted. You can prevent this behavior by not granting view access to users for specific hierarchies. . See: Setting Up Role Based Access Control, page 3-6, and Overview of Role Based Security Access, page 3-1

To view attribute details for hierarchies and sites:

1. Select either a hierarchy record, or site record, in any of the panes on the workbench.

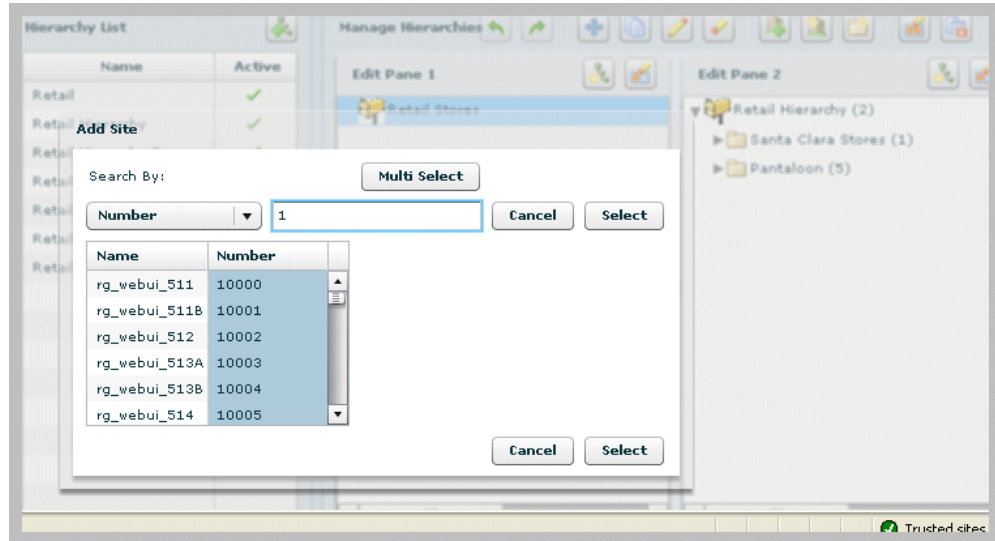
The assigned attributes appear.

See: Viewing and Creating Site Attribute Assignments, page 4-12, and Viewing and Creating Hierarchy Attribute Assignments, page 4-43

Attributes	
Primary Attributes for site Pantaloon Retail 005	
Number: Retail005	Name: Pantaloon Retail 005
Purpose: Retail Show Room	Description:
Type: Internal	Status: Active
Address: 746 LARKIN STREET, SAN FRANCISCO, CA 94109, US	
Store Information	
Store Number: 5	Franchised: No
Format: 08-A	Number of Restrooms: 5
Occupancy Level: 5	Number of Levels: 5
Number of Entrances: 2	Total Area: 1223
Franchise Information	
Name:	
email Address:	
Telephone: 914066581323	

To add sites to a hierarchy record:

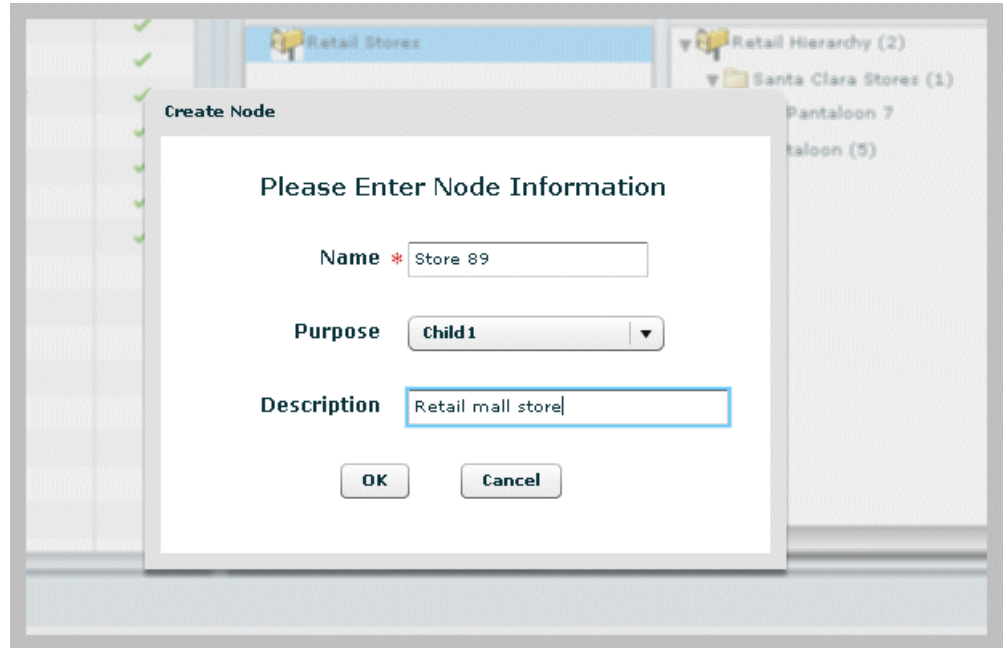
1. Select the Add Site icon.
2. Drag and drop it on the applicable hierarchy record.
The Add Site dialog box appears.
3. Select a Search By value, choices are Name or number. Enter search criteria, the applicable values automatically display.



4. Select a record and choose Select to display it on the Hierarchy Workbench.
You have the option to select multiple records. Choose Multi Select to display a toggle box. Select:
 - The Move All arrow to select all the records displayed
 - The Move arrow to select individual records
5. Save your work.
6. Select the Update icon to navigate to the Update Site page to change details for the site record, see: Updating Site Records, page 5-29
See: Hierarchy Workbench Navigation, page 6-15

To create a node for a hierarchy record:

1. Select the Create Node icon
2. Select a record or area on the workbench where you want to position this new node.
The Create Node dialog box appears.



3. Enter the following information:

- Name: Unique value for the name of this node
- Purpose: Destination of the node on the hierarchy, choices are Area, Child 1, Division, Parent
- Description

4. Select OK to save your work.

See: Hierarchy Workbench Navigation, page 6-15

Hierarchy Workbench Navigation

The following table summarizes the Hierarchy Workbench navigation actions between the Edit panes. After selecting one or more sites or nodes in the hierarchy structure, you can perform the following transactions:

Transaction	Mouse Action	Button Action	Right-Click Menu over selection
Move	Drag selection to a destination node or site to add as child—or between two elements to add as a peer.	Select Move, and then select a destination node or site to add as child—or between two elements to add as a peer.	Select Move, and then select a destination node or site to add as child—or between two elements to add as a peer.
Copy	Select the Control key and drag selection to a destination node or site to copy as a child—or between two elements to copy as a peer.	Select Copy, and then select a destination node or site to copy as a child—or between two elements to copy as a peer.	Select Copy, and then select a destination node or site to copy as child—or between two elements to copy as a peer.
Remove	Select the Delete key.	Select Remove.	Select Remove.
Update	Not Available	Select Update, and enter details.	Select Update, and enter details.
Create Site	Not Available	Select Create Site, and then select a destination node or site to create as a child—or between two elements to create as a peer. Enter details.	Select Create Site, and then select a destination node or site to create as a child—or between two elements to create as a peer. Enter details.
Add Site	Not Available	Select Add Site, and then select a destination node or site to add as a child—or between two elements to add as a peer. Choose from the list of values.	Select Add Site, and then select a destination node or site to add as a child—or between two elements to add as a peer. Choose from the list of values.

Transaction	Mouse Action	Button Action	Right-Click Menu over selection
Create Node	Not Available	Select Create Node, and then select a destination to create as a child—or between two elements to create as a peer. Enter details.	Select Create Node, and then select a destination to create as a child—or between two elements to create as a peer. Enter details.
Cancel	Select the Escape key.	Select Cancel.	Not available. However, you can left-click outside the Edit pane to cancel the current action.

Navigator Paths

Site Hub Navigation Paths

Page Name	Navigation Path
Add Attribute Groups to Country	Administrator > Locations > Assignments > [Attribute Groups tab] > [Add Attribute Group]
Add Attribute Groups to Hierarchy Purpose	Administrator > Hierarchies > Assignments > [Attribute Groups tab] > [Add Attribute Group]
Add Attribute Groups to Site Purpose	Administrator > Trade Areas > Assignments > [Attribute Groups tab] > [Add Attribute Group]
Add Attribute Groups to Trade Area Group	Administrator > Trade Areas > Assignments > [Attribute Groups tab] > [Add Attribute Group]
Add to Cluster	Simple Search > [Select a record] > Add to Cluster
Advanced Search	Site User > Sites > Advanced Search Site User > Hierarchies > Advanced Search

Page Name	Navigation Path
Advanced Search Results	<p>Site User > Hierarchies > Advanced Search > [select template] > [Go] > [select criteria] > [Search]</p> <p>Site User > Sites > Advanced Search > [select template] > [Go] > [select criteria] > [Search]</p>
Assignments	<p>Administrator > Hierarchies > Assignments</p> <p>Administrator > Locations > Assignments</p> <p>Administrator > Sites > Assignments</p> <p>Administrator > Trade Areas > Assignments</p>
Attribute Group Details	<p>Administrator > Hierarchies > Attributes > [select Display Name record]</p> <p>Administrator > Sites > Attributes > [select Display Name record]</p> <p>Administrator > Locations > Attributes > [select Display Name record]</p> <p>Administrator > Trade Areas > Attributes > [select Display Name record]</p>
Clusters	Site User > Clusters
Copy Attribute Groups	Create Site: Basic Information > [Enter required information] > [Select Attribute Groups for Copy]
Create Asset Instances	Site User > Sites > [Select records] > [Create Asset]

Page Name	Navigation Path
Create Attribute	Administrator > Hierarchies > Attributes > [select a record] > Attribute Group Details > [Add Attribute] Administrator > Locations > Attributes > [select a record] > Attribute Group Details > [Add Attribute] Administrator > Sites > Attributes > [select a record] > Attribute Group Details > [Add Attribute] Administrator > Trade Areas > Attributes > [select a record] > Attribute Group Details > [Add Attribute]
Create Attribute Group for Hierarchy	Administrator > Hierarchies > Attributes > Create
Create Attribute Group for Location	Administrator > Locations > Attributes > Create
Create Attribute Group for Site	Administrator > Sites > Attributes > Create
Create Attribute Group for Trade Area	Administrator > Trade Areas > Attributes > Create
Create Country	Administrator > Locations > Assignments > Attribute Pages tab > [Create Page]
Create Cluster	Site User > Clusters > [Create]
Create Group	Administrator > Role Security > User Groups > [Create Group]
Create Hierarchy: Basic Information	Site User > Sites > Hierarchies > [Create]
Create Inventory Organizations	Site User > Sites > [Select records] > [Create Inventory Organization]
Create Node	Site User > Hierarchies > Hierarchy Workbench > [search for records] > [Create Node]

Page Name	Navigation Path
Create Page	Administrator > Hierarchies > Assignments > [select Purpose] > [Go] > Attribute Pages tab > [Create Page] Administrator > Locations > Assignments > [select Country] > [Go] > Attribute Pages tab > [Create Page] Administrator > Sites > Assignments > [select Purpose] > [Go] > Attribute Pages tab > [Create Page] Administrator > Trade Areas > Assignments > [select Trade Area Group] > [Go] > Attribute Pages tab > [Create Page]
Create Role	Administrator > Role Security > Roles > [Create Role line]
Create Property Locations	Site User > Sites > [Select records] > [Create Property Location]
Create Site	Site User > Sites > Sites > [Create]
Create Site: Basic Information	Site User > Sites > Sites > [Create] > [Select a method] > [Create]
Create Site: Detail Information	Site User > Sites > Sites > [Create] > [Select a method] > [Create] > [Enter values in required fields] > [Continue]
Create Template	Site User > Sites > Templates > [Create]
Create Template: Basic Information	Site User > Sites > Templates > [Create] > [choose method] > [Create]
Create Template: Detail Information	Site User > Sites > Templates > [Create] > [choose method] > [Create] > Create Template: Basic Information > [enter required fields] > [Continue]
Create Trade Area Group	Administrator > Trade Areas > Trade Area Groups > [Create]

Page Name	Navigation Path
Create Value Set	Administrator > Miscellaneous > Maintain Value Sets > [Create]
Edit Attribute Groups for Hierarchy	Administrator > Hierarchies > Attributes > [select a record] > Attribute Group Details > [Edit]
Edit Attribute Groups for Site	Administrator > Sites > Attributes > [select a record] > Attribute Group Details > [Edit]
Edit Attribute Groups for Site Location	Administrator > Locations > Attributes > [select a record] > Attribute Group Details > [Edit]
Edit Attribute Group for Trade Area	Administrator > Trade Areas > Attributes > [select a record] > Attribute Group Details > [Edit]
Edit Group	Administrator > Role Security > User Groups > [select User Group link] > Group Details > [Update]
Generate Database View	Administrator > Sites > Attributes > [select a records] > Generate Database View Administrator > Locations > Attributes > [select a records] > Generate Database View
Geocoder	Administrator > Map Preferences > Geocoder
Group Details	Administrator > Role Security > User Groups > [select User Group link]
Hierarchies	Site User > Hierarchies
Hierarchy Workbench	Site User > Hierarchies > Hierarchy Search > [enter search criteria] > [select records] > Update My Hierarchies or Update Hierarchy Site User > Hierarchies > Hierarchy Workbench Site User > Home > My Hierarchies > Update My Hierarchies or Update Hierarchy

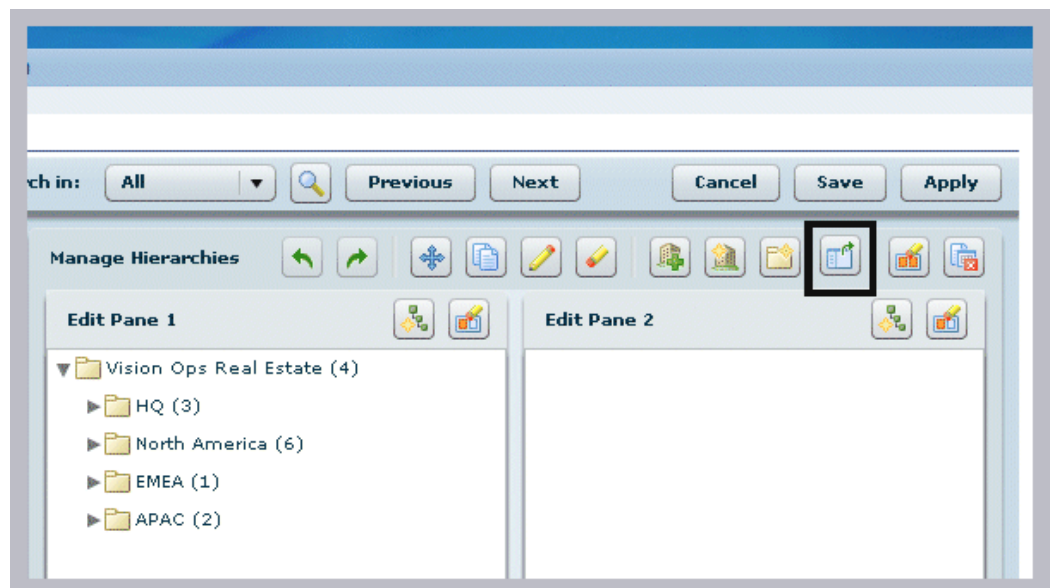
Page Name	Navigation Path
Import Format	Administrator > Sites > Import Format
Maintain Unique Key	Administrator > Locations > Attributes > [select a record] > Attribute Group Details > [Maintain Unique Key]
Maintain Value Sets	Administrator > Miscellaneous
Map Preferences	Administrator > Map Preferences > Map Preferences
My Clusters	Site User > My Clusters
My Hierarchies	Site User > My Hierarchies
My Sites	Site User > My Sites
Results Format	Administrator > Sites > Results Format
Role Assignments	Administrator > Role Security > Role Assignments
Role Details	Administrator > Role Security > Roles > [select Role link]
Roles	Administrator > Role Security > Roles
Person	Administrator > Role Security > Roles > [select Last Updated By link]
Personalize Display Formats	Site User > Sites > Simple Search > Personalize
Search Criteria	Administrator > Sites > Search Criteria
Simple Search	Site User > Sites > Simple Search
Site Map	Sites > [select record] > View Site > [View Map]
Site Map Preferences	Administrator > Map Preferences > Map Preferences

Page Name	Navigation Path
Templates	Site User > Sites > Templates
Trade Area Groups	Administrator > Trade Areas > Trade Area Groups
Update Role	Administrator > Role Security > Roles > [select Role link] > Role Details > [Update]
Update Site	Sites > [select record] > [Update]
Update Trade Area Group	Administrator > Trade Areas > Trade Area Groups > [select a record] > [Update]
User Groups	Administrator > Role Security > User Groups
View Cluster	Site User > Clusters > [enter search criteria] > [select record]
View Comparisons	Simple Search > [Select records] > Compare > [Go]
View Hierarchy	Site User > Hierarchies > [select criteria] > [Go] > [select a record]
View Site	Sites > [select record]
View Template	Site User > Sites > Templates > [select record]
View Trade Area Group	Administrator > Trade Areas > Trade Area Groups > [select a record]

Custom Hierarchy Page

Setting Up a Custom Hierarchy Page

You can set up a custom page for entering transactions for your environment's requirements. This page is accessed from the Hierarchy Workbench and enables data displayed on the panes to be passed to the custom page. You can perform a transaction on the custom page, and then navigate back to the Hierarchy Workbench. The Callout icon on the Hierarchy Workbench is used to navigate to the custom page.



Note: This functionality only moves data to Oracle Applications Framework pages and not other website pages.

Setup

The profile option RRS: Hierarchy UI Custom URL is populated with the address for the custom page. When the profile option is defined, the Callout icon on the Hierarchy Workbench is enabled.

Define the address for the custom page in profile option using the following format, where CustomPG is the name of your page: /oracle/apps/rrs/site/user/webui/CustomPG

See: Profile Options, page 2-5

When the profile option has been defined, the Callout icon appears in the Hierarchy Workbench and the pop-up menu:

1. Select a hierarchy, node, or site object. You can only select one object, not multiple objects in this feature.
2. Select Callout to navigate to the custom page.

Parameters Passed To Custom Page

During navigation, relevant parameters are passed to the custom page depending on the object selected in the hierarchy structure. The following table shows hierarchy, site, and node parameters passed to the custom page:

Hierarchy Object

Hierarchy in the Hierarchy List	Description
objectType	Type of object user selected, this value is hierarchy.
siteGroupId	Internal ID of the selected hierarchy.
siteGroupName	Name of the selected hierarchy.

Site Object

Site in Edit Pane	Description
objectType	Type of object user selected, this value is site.
siteId	Internal ID of the selected site.

Site in Edit Pane	Description
siteIdNum	Identification number of the selected site.
siteName	Name of the selected site.
siteGroupId	Internal ID of the hierarchy containing selected site.
siteGroupName	Name of the hierarchy containing selected site.
parentMemberType	Type of parent of selected site; values are site or node.
parentMemberId	Internal ID of parent of selected site.
parentMemberIdNum	Identification number of the parent of selected site.

Node Object

Node in Edit Pane	Description
objectType	Type of object user selected, this value is node.
nodeId	Internal ID of the selected node.
nodeIdNum	Identification number of the selected node.
nodeName	Name of the selected node.
siteGroupId	Internal ID of the hierarchy containing selected node.
siteGroupName	Name of the hierarchy containing selected node.
parentMemberType	Type of parent of selected node, values are site or node.

Node in Edit Pane	Description
parentMemberId	Internal ID of parent of selected node.
parentMemberIdNum	Identification number of the parent of selected site.

Parameters Passed Back to Hierarchy Workbench

When the custom Oracle Application page transaction is complete, and you navigate back to the Hierarchy Workbench, consider the following occurrences:

- In the processFormRequest method, the custom page will setForwardURL
To:
pageFunction = RRS_HIERARCHYCONTENTSPG_FN
- Set retainAM=Y to ensure the Hierarchy Workbench transaction state is not dropped.
- Ensure add_bread_crumb = Y

Caution: Avoid using add_bread_crumb = N as this will break subsequent navigation flows.
- If the custom page has a fresh transaction (no cached VO queries or transaction state), the next time you access the custom page—call
pageContext.releaseRootApplicationModule() in processFormRequest immediately prior to the setForwardURL call.
- The Hierarchy Workbench can be directly accessed through page-level tabs. This standalone access requires additional parameters when returning from the custom page:
 - Custom Callout in Hierarchy Workbench will pass two additional parameters (standalone and selectedTab). If the Hierarchy Workbench is accessed from page-level tabs, the standalone is Yes. The selectedTab stores the currently selected menu function.
 - When the standalone is Yes, navigate back to Hierarchy Workbench using
add_bread_crumb = N

Sample of Return Call in processFormRequest:

```

//check whether it is navigated from the standalone workbench
String standalone = pageContext.getParameter("standalone");
String selectedTab = pageContext.getParameter("selectedTab");
if(standalone != null && standalone.equalsIgnoreCase("Y")){
    pageContext.forwardImmediately("OA.jsp?OAFunc="+pageFunction +
"&OASF=" + selectedTab + OAHP=RRS_USER_HOME_PAGE_MENU",
                                null,
                                OAWebBeanConstants.KEEP_MENU_CONTEXT,
                                null,
                                null,
                                true,
                                OAWebBeanConstants.ADD_BREAD_CRUMB_NO);
//if navigate from the standalone workbench, need drop the breadcrumb
chain
    }
    else{
        pageContext.forwardImmediately("OA.jsp?OAFunc="+pageFunction +
"&OASF=" + selectedTab + "&OAHP=RRS_USER_HOME_PAGE_MENU",
                                null,
                                OAWebBeanConstants.KEEP_MENU_CONTEXT,
                                null,
                                null,
                                true,
                                OAWebBeanConstants.ADD_BREAD_CRUMB_YES);
    }
}

```

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