Oracle® Retail XBRi Cloud Services

Administration Guide
Release 18.3
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Oracle® Retail XBRi Cloud Services Administration Guide, Release 18.3

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Preface

This Administration Guide describes user roles and privileges and how these are managed by the customer administrator.

Audience

This guide is for the following audiences:

- Customer administrators

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Related Documents

For more information, see the following documents in the Oracle Retail XBR[i] Cloud Services Release 18.3 documentation set:

- Administration Guide
- API Interface Guide
- Data Recall/Erase API Guide
- Implementation Guide
- Release Notes
- Web User Guide
- Administrator User Guide

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To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
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Conventions

Navigate: This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement "the Window Name window opens."

```
This is a code sample
    It is used to display examples of code
```

1

Overview

This guide explains user roles and privileges and defines common tasks performed by XBR^i customer administrators.

- XBR^i user roles and privileges and the processes for creating and managing users and groups
- Configuring for Master File Distribution

Comprehensive documentation on XBR^i administration is available in the *Oracle Retail XBR^i Cloud Services Administrator User Guide*, which is available in the Oracle Retail Library on the Oracle Technical Network (OTN), and which can also be invoked from within the Administration areas of XBR^i through online help.

Oracle Support

It is considered to be a best practice to have all Oracle Retail XBR^i Cloud Services support requests submitted through a single point of contact for that customer environment; the client designated administrator is usually designated to perform this role.

The link to use when submitting Service Requests (SR) is:

https://myhelp.oracle.com/app/home

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User Administration

Oracle XBR*i* Cloud Services Core User Roles

In Oracle Retail XBR*i* Cloud Service, you specify user access to the application by assigning a role to each user. A user can be assigned to one of four security levels, Administrator, Manager, Analyst and Read Only. A user's security level is set up in his or her user profile by the customer Administrator using the User Manager in the XBR*i* cloud application.

Table 1.1 XBR*i* User Roles

Role	Description
READ ONLY	This is a user role that will only have read only access to reports and documents, excluding Personal data, such as Customer Name, that identifies a specific individual. This data will be masked, unless the Administrator grants the user Personal data access. Read only users cannot create their own reports or customize existing reports. Read only users cannot create subscriptions. Read only users can only modify their own user preferences and have no access to modifying object or data security.
ANALYST	This is a user role that will have read only access to Shared Reports folders (based on object level security) and full access to the reports in their My Reports folders, excluding Personal data, such as Customer Name, that identifies a specific individual. This data will be masked, unless the Administrator grants the user personal data access. Analysts can create subscriptions only for distribution to themselves. Analysts can only modify their own user preferences and have no access to modifying object or data security.
MANAGER	This is an administrator role that has the same permissions and functionality as Admins, except for the access to user creation/management and assignment of data security filters, and access to Personal data, such as Customer Name, that identifies a specific individual. This data will be masked, unless the Administrator grants the user personal data access.
ADMINISTRATOR	This is an administrator role that will have full access to all objects in the customer owned folders, including Personal data, such as Customer Name, which identifies a specific individual. Admins will have write access to Shared Reports as well as full access to all users' My Reports folders in order to publish a report created by an analyst for all users. Admin users can create and manage other shared, reusable objects such as filters, prompts, and x-links. Admins can create and manage subscriptions for multiple recipients, including Master File Distribution. Admins can create new users, delete or deactivate users, or modify existing users' permissions. Admins can set object security and data security filters for other users. Any data security filters that are created for an admin user by XBRADMIN cannot be modified. Only Admin users can modify system preferences. Only Admin users have access to the Data Editor.

User Roles, Privileges, and Feature Access

The following table shows privileges and features assigned to users in XBR*i* by user role.

Table 1.2 XBR*i* **User Roles, Privileges, and Feature Access**

Privileges	Administrator	Manager	Analyst	Read Only
XBRi Privileges on Reports , Documents, and Dashboards				
Run Reports, Documents, and Dashboards	X	X	X	X
Edit Reports, Documents, and Dashboards	X	X	X	
Create Reports, Documents, and Dashboards	X	X		
XBRi Feature Access				
Smart Links	X	X	X	X
Watch List	X	X	X	X
Linking Reports	X	X	X	
Alerts	X	X	X	X
Controls/Exceptions	X	X	X	X
Video Linking	X	X	X	X
Case Management	X	X	X	X
Subscriptions	X	X	X	
Full Description Data View	X	X (if given by admin)	X (if given by admin)	X (if given by admin)
XBRi Administration				
User Management	X			
Lookup Management	X			
Smart Link Management	X			
Data Editor	X			
Controls / Exception Management – Targets	X	X		
Master File Distribution	X	X		
Oracle XBRi Mobile				
Access Mobile Application	X	X	X	X
Run Reports, Dashboards and Documents	X	X	X	X
Run Quick Lookups	X	X	X	X
Access and Generate Surveys	X	X	X	X

Create New Users and Groups

> **IMPORTANT!** Only use a Customer Administrator account to create new users and groups.

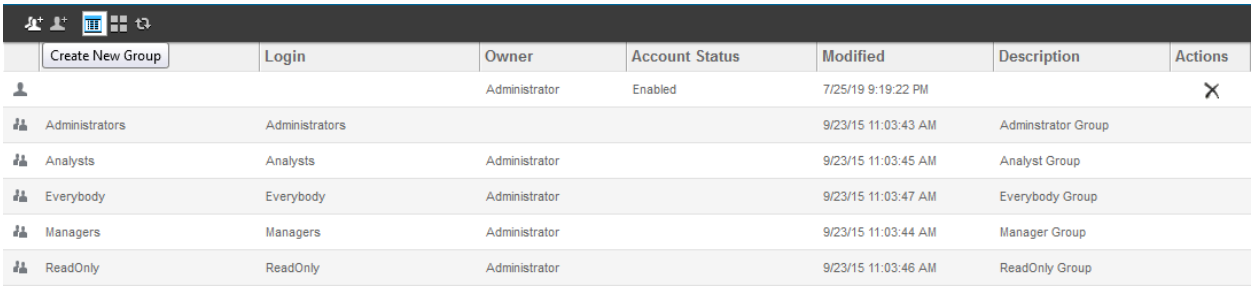
The Customer Administrator must create accounts for XBR^i users to enable them to log into the application and to grant them access to the features and privileges appropriate to their role. When the user is created, that user is added by default to the Everybody group and to the User Type group that the administrator selects when creating the user. Oracle provides the Everybody group and the User Type

groups, which cannot be modified. The Customer Administrator can create additional customizable groups and add users to them.

Creating a New User

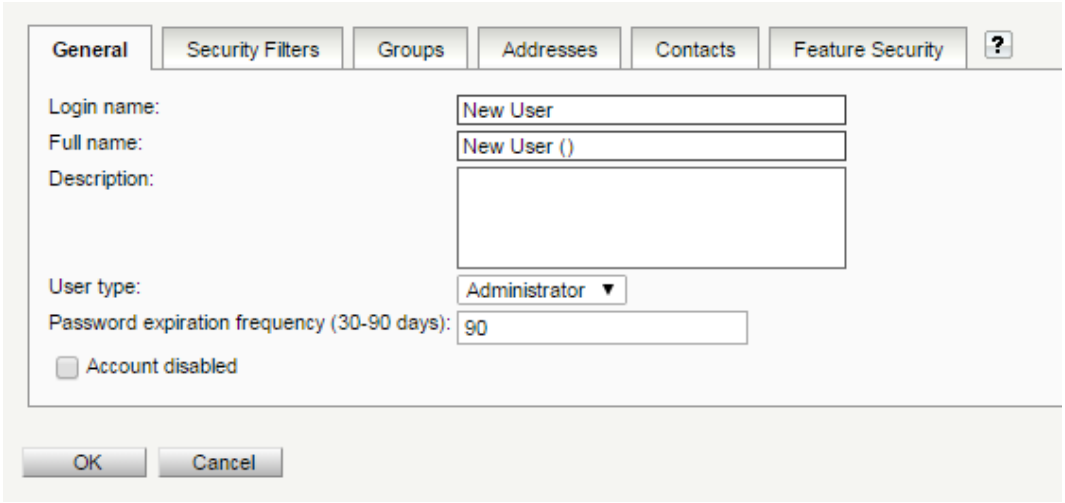
To create a user:

1. Log in to XBR^{i} as the Customer Administrator.
2. From the Admin menu, choose **User Manager**. This displays the User Manager, which lists the user groups.



User Manager

3. Click the **New User** icon  on the toolbar. This displays the User Editor.

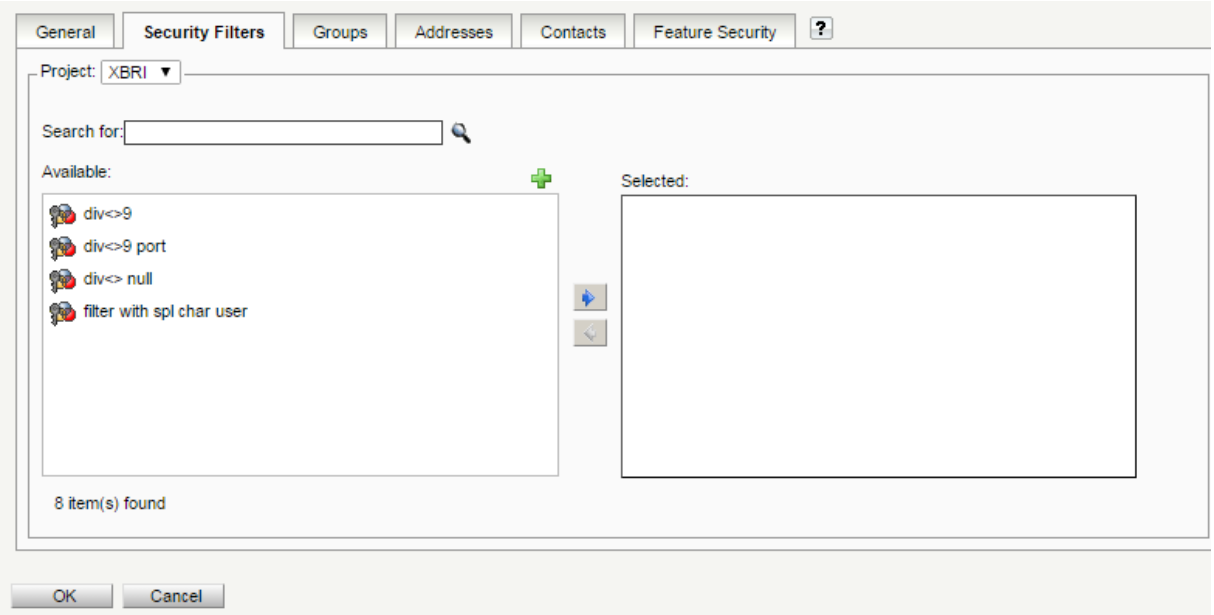


User Editor – General

> **Note**: The Contacts tab is not currently used.

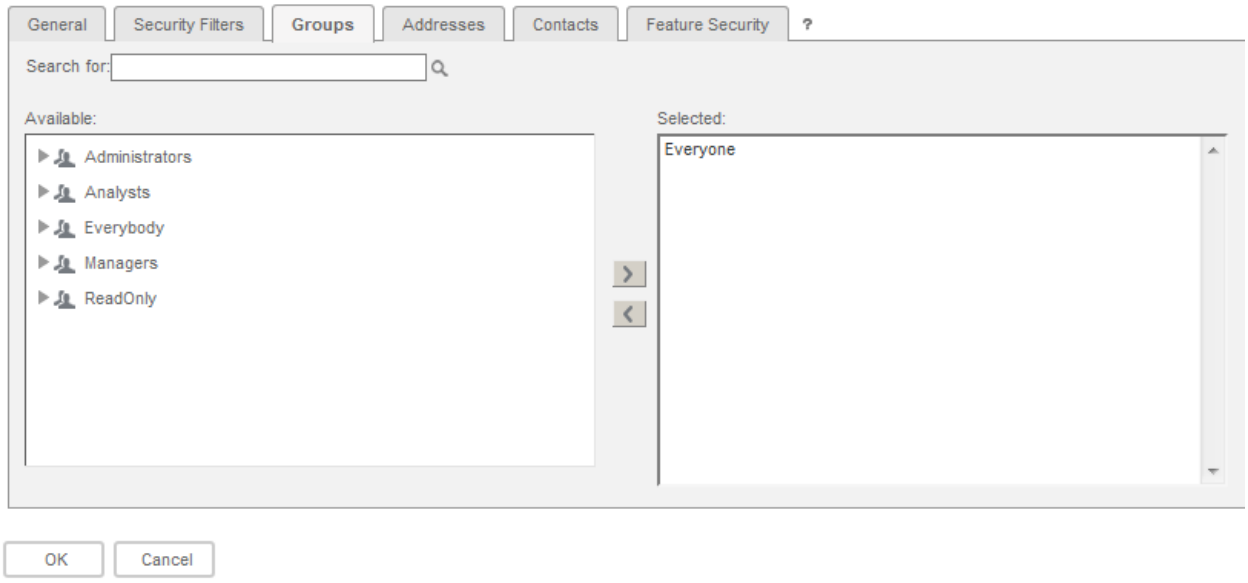
4. On the **General** tab, enter the following information:
   - Login name and Full name of the new user, and a Description. Note: The login ID is limited to 50 characters.
   - Set the Password expiration frequency.
   - Select a User Type from the drop-down list. This determines the privileges the user will have, for example on reports, documents and features, as defined in the Table 1.1 XBRi User Roles.
   - Make sure the **Account disabled** check box is cleared.

5. On the **Security Filters** tab, assign a security filter to the user. This restricts the data the user can see displayed in reports. In many cases you will need to create a new security filter for the user. (This step is optional).



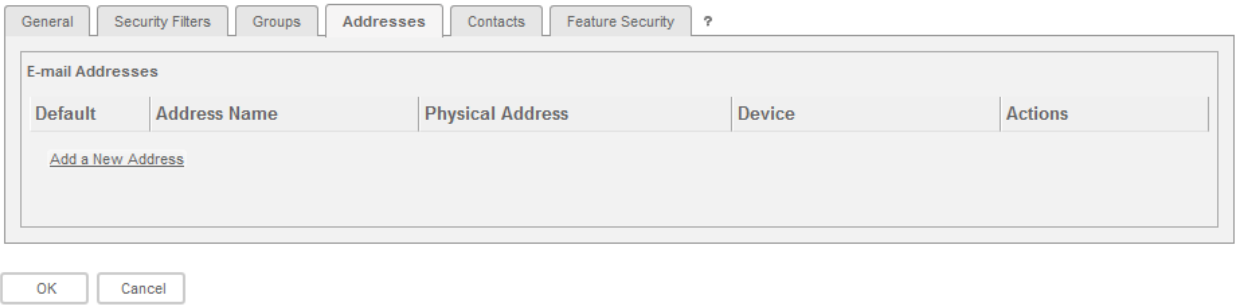
User Editor – Security Filters

6. On the **Groups** tab, select the group(s) to which you want to assign this user. The user inherits any features that are enabled for the group, and inherits any security filter restrictions from security filters assigned to the group to which he or she belongs. The user is automatically assigned to the group associated with the selected user type as well as the Everybody group. (This step is optional).



User Editor - Groups

7. On the **Addresses** tab, add email addresses. At least one email address is required. These are used for delivering reports and documents to which this user is subscribed.



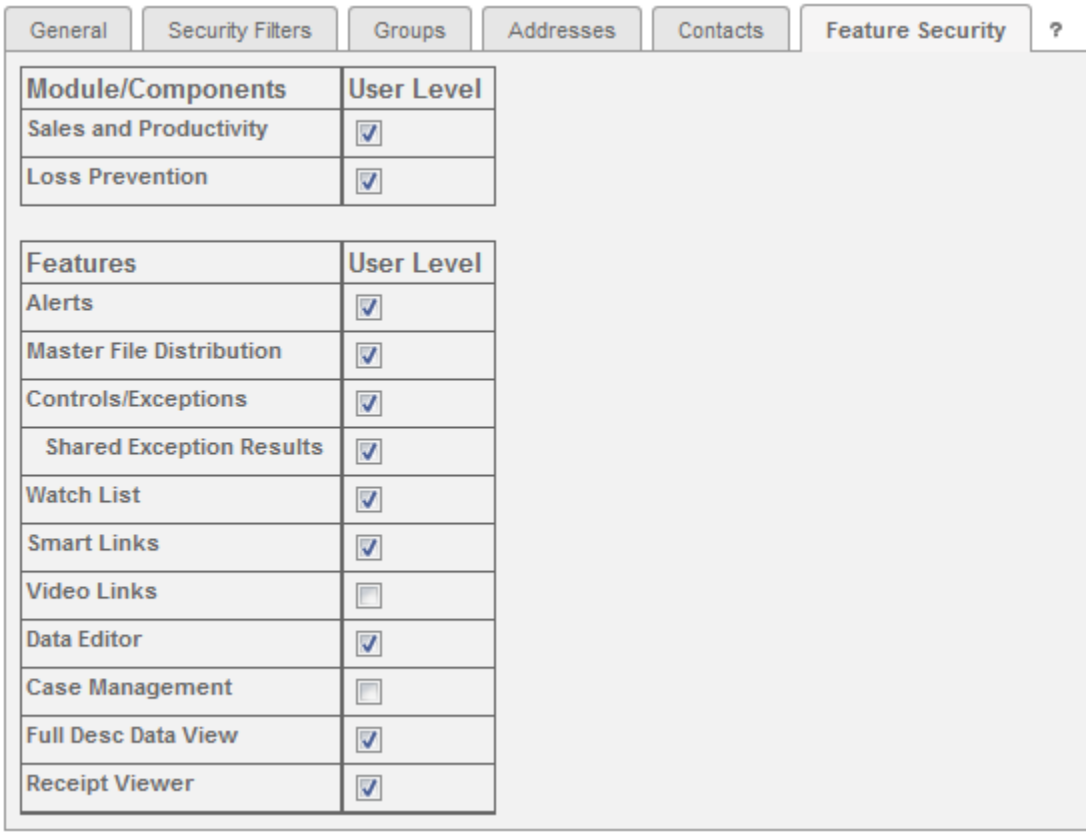
User Editor - Addresses

8. On the **Feature Security** tab, select whether to enable either or both of the following modules: Loss Prevention, and Sales and Productivity (if your organization has not purchased the Sales and Productivity module, you will not see this option). Also select the features you want to assign to the user by selecting the check boxes in the **User Level** column.

Notes: All installations include the Loss Prevention module. The Sales and Productivity module is included when the license for it is also purchased by the organization.

If you disable access to a module, the user will not have access to the core reports, controls, metrics, and filters for that module.

The customers' module selection is set by Oracle after installation.



User Editor – Feature Security

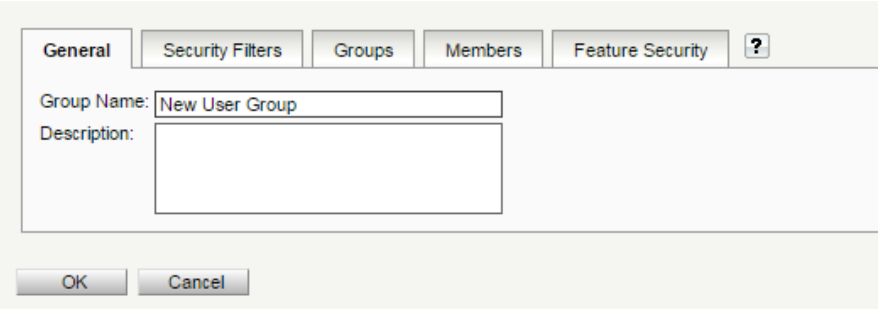
9. Click **OK** to save the new user and return to the User Manager.

After you save the new user, the user is sent an email with a temporary password that is used to log in for the first time.

Creating a New Group

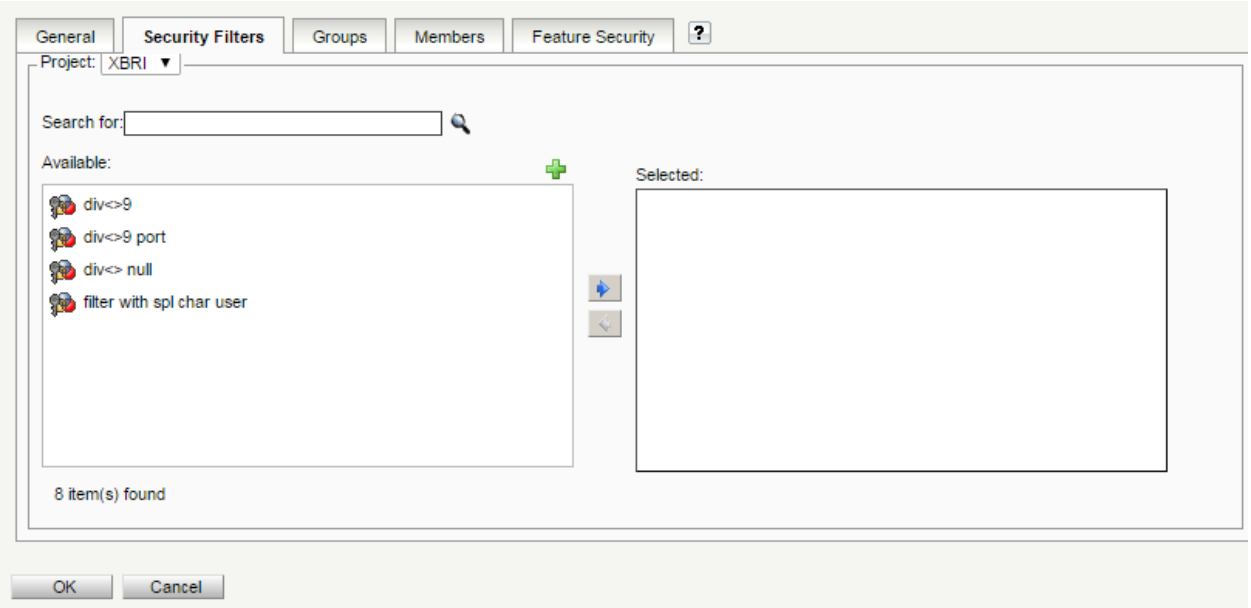
To create a group:

1. Log in to XBR^i as the Customer Administrator.
2. From the Admin menu, choose **User Manager**. This displays the User Manager, which lists the user groups.
3. Click the **New Group** icon  on the toolbar. This displays the Group Editor.



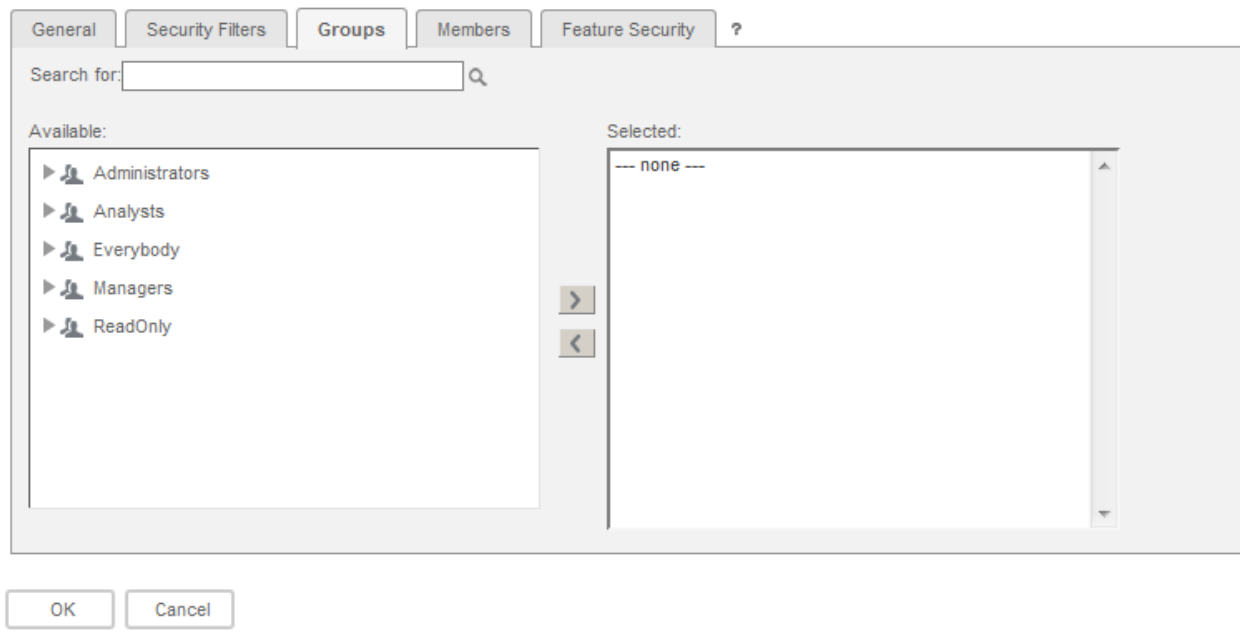
Group Editor - General

4. On the General tab, enter a name and description for the group.
5. On the Security Filters tab, assign security filters. These restrict the data this group can see displayed in reports. (This step is optional).



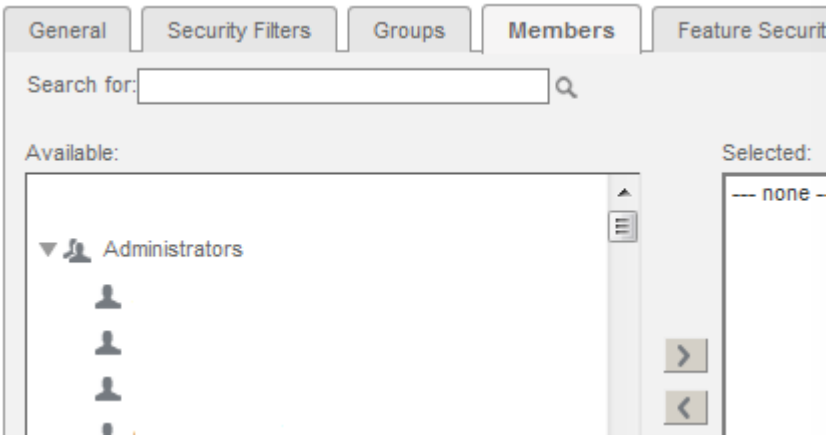
Group Editor – Security Filters

6. On the Groups tab, you can place existing groups within the new group you are creating. Any groups that you select from the list are placed within the new group, and therefore, at a lower level than your new group. You can expand and contract the existing groups to locate specific users, or search for groups using the **Search** field.



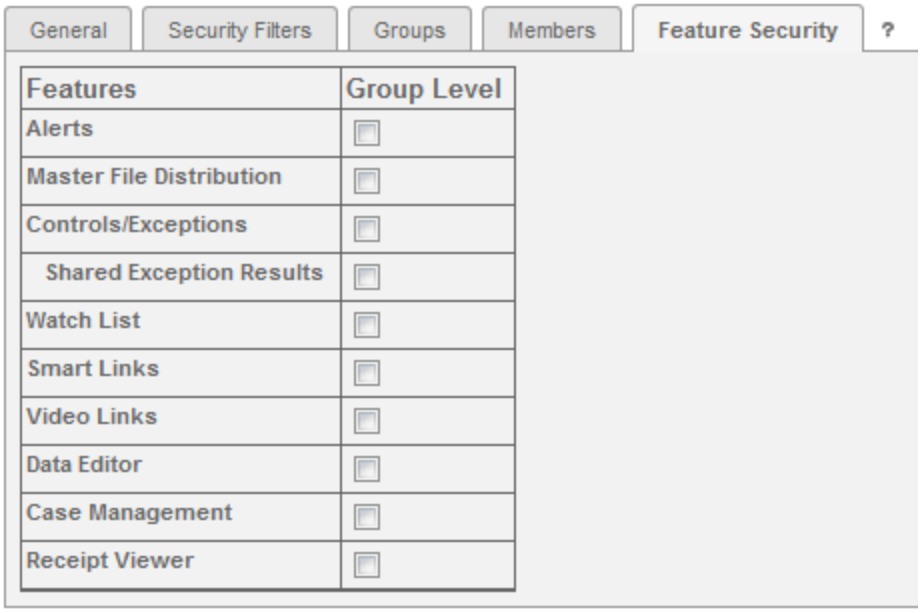
Group Editor - Groups

7. On the Members tab, you can determine which users will belong to your new group. You can expand and contract the existing groups to locate specific users, or search for users using the **Search for** field.



Group Editor - Members

8. On the Feature Security tab, select the check box next to each feature you want to enable for the group.



Group Editor – Feature Security

> **Note:** Module/Components features for a group are inherited from the module type set for the organization by the Core XBR^{i} Administrator during the post-installation steps; therefore, these feature options are not displayed in the Feature Security tab of the Group Editor. If the organization has both the Loss Prevention and Sales and Productivity modules, these options can be enabled or disabled for individual users in the User Editor.

9. Click **OK** to save the new group and return to the User Manager.

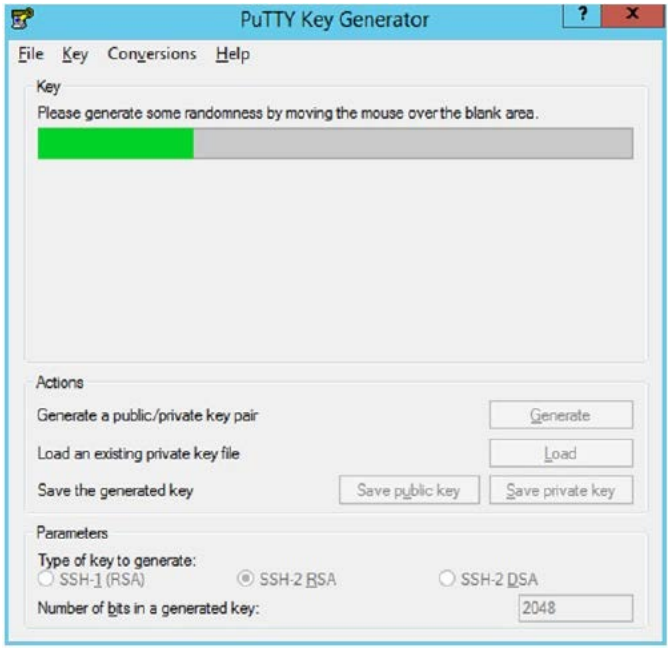
Adding Authorized Keys

Use this process to generate a 2048 bit RSA key and add it to the SFTP server. This provides access to the application without a password. With Windows, use the WinSCP tool or with Linux, use ssh-keygen.

1. Launch WinSCP and select Tools/Run PuttyGen.
2. Select SSH-2 RSA for the type of key to generate and enter 2048 for the number of bits in a generated key field and click Generate.

Key Generator

3. Move the mouse over the blank space in the window until the key is generated



Key Generator Progress

4. Once the key is generated, click **Save public key** to save the public key to a file.
5. Click **Save private key** to save the Private key to a file. Confirm whether to save it with or without a passphrase.
6. Open an SR with Oracle Support to associate the Public half of the Key with your SFTP account. Make sure to attach the Key with the SR.

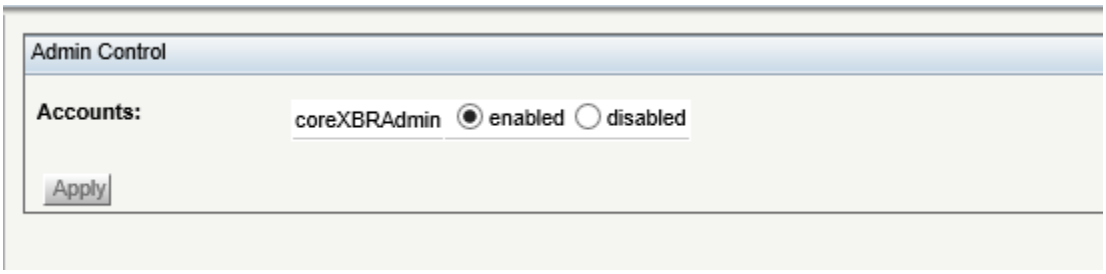
Disable or Enable Admin Control Users

The Project Defaults, Admin Control page lets you enable or disable users on the Admin Control list. The users on this list are those with elevated privileges who performed the installation and configuration of your application.

> **IMPORTANT:** It is recommended that you disable all of the users on the Admin Control list to prevent unauthorized activity. You can enable them as needed if you require assistance from Oracle.

To enable or disable Admin Control users:

1. Log in to XBRi as the Customer Administrator.
2. From the Admin menu, choose **Project Defaults.**
3. Under Settings, click the **Admin Control** link. This displays the Admin Control page:



Admin Control Page

- To disable Admin Control for a user, click the **disabled** button next to the user name.
- To enable Admin Control for a user, click the **enabled** button next to the user name.

4. Click **Apply** to apply the changes.

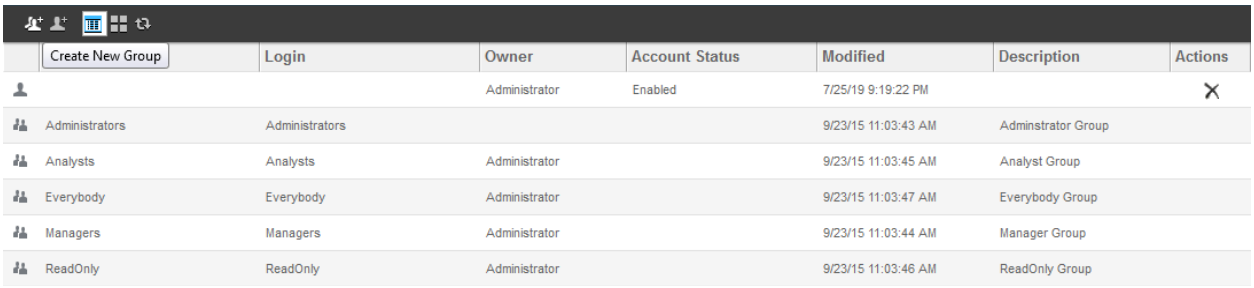
Creating and Maintaining an XBRLoader User Account

If you use XBRLoader webservice as part of the ETL process, you need an XBRi user account to log in to XBRLoader. This can be a dedicated account that is just used for logging in to XBRLoader, or it can be shared with another user. Oracle recommends that you use one dedicated account, so that the system does not see the same user logged in twice, and so that auditing will detect only the operations of a distinct user. Only one account can be used to log in to the XBRLoader, since its login credentials must be also be specified in the Xcenter Broadcaster.

Creating the XBRLoader Account in XBRi

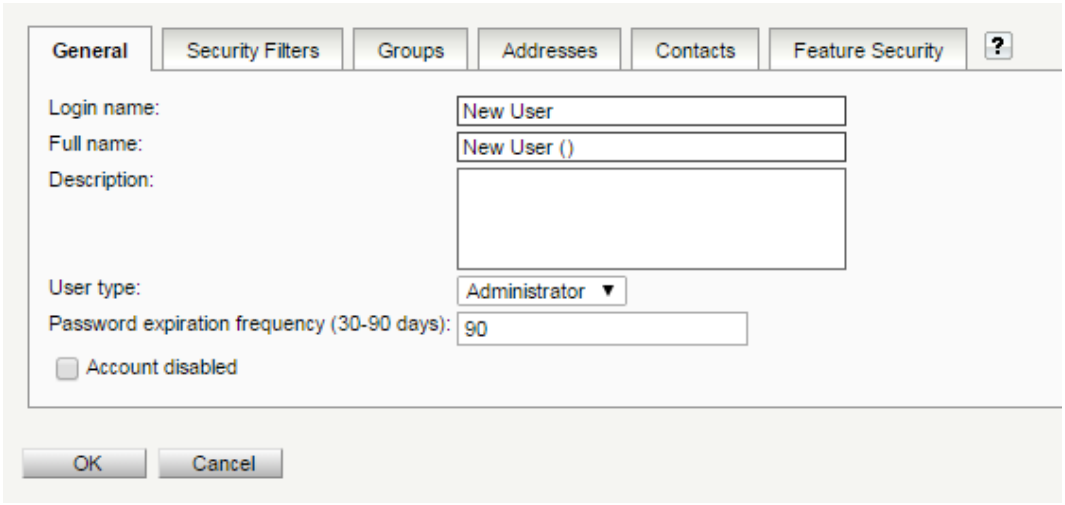
To create the XBRLoader Login user:

1. Log in to XBRi as the Customer Administrator.
2. From the Admin menu, choose **User Manager**. This displays the User Manager, which lists the user groups.



User Manager

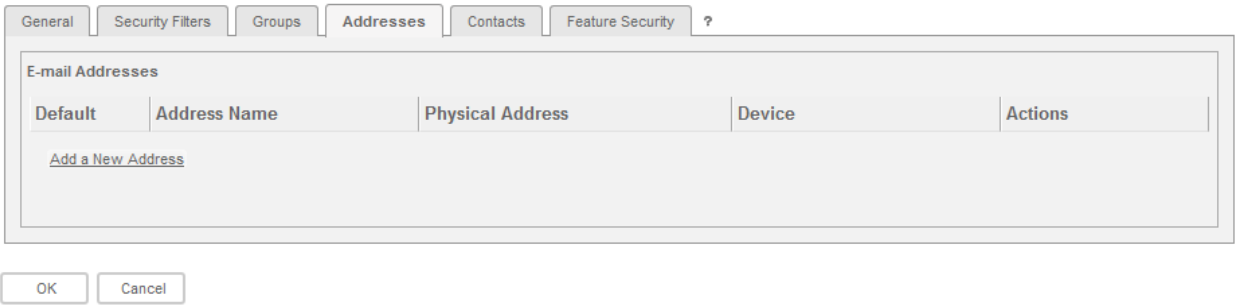
3. Click the **New User** icon  on the toolbar. This displays the User Editor.



User Editor – General

> **Note**: The Contacts tab is not currently used.

4. On the **General** tab, enter the following information:
   - Enter a Login name and Full name for the XBRLoader login user. The Login name is the name that is entered in the User name field in the XBRi login prompt.
   - Set the Password expiration frequency. It is recommended that you make a note of the Password expiration frequency and the date the user was created and pass this information to a user who is responsible for resetting the XBRLoader login user password. There will not be automatic notification that the password is expiring.
   - Select a User Type from the drop-down list. It is recommended that you choose Read Only.
   - Make sure the **Account disabled** check box is cleared.
5. It is not necessary to assign a security filter or a group to the XBRLoader login user..
6. On the **Addresses** tab, add an email address that is not assigned to any other XBRi user. Make sure that this email address is accessible to the user responsible for maintaining the XBRLoader login account passwords, because a password reset prompt will be sent to this email address when the user account is created.



User Editor – Addresses

7. It is not necessary to select or clear any features in the Feature Security tab.
8. Click **OK** to save the new XBRLoader login user and return to the User Manager.

After you save the new user, an email is sent to the email address specified in the Addresses tab that contains a temporary password that is used to log in for the first time. The person responsible for maintaining the XBRLoader password should receive this email and follow the instructions to reset the password. The new password, preceded by _XBR is used when configuring the login credentials in XBRLoader. This is explained in step 5 in the following section.

Configuring the XBRLoader Login Credentials in Xcenter Broadcaster

After you create the XBRLoader login account and reset the password for the first time, you must enter the account's login credentials in the Xcenter Broadcaster for the XBRLoader Export.

To configure the XBRLoader login credentials:

1. Log in to Oracle Retail Xstore Office.
2. From the main menu, select System, then Broadcaster Management.
3. The Broadcaster Management page lists available broadcasters. Select XBRLoader from the list. This displays the Broadcast Summary window.
4. Click **Edit**. This displays the Edit Broadcaster page.
5. Click the Connect tab and set the following properties:
   - Username – Enter the user name for the XBRLoader login account. **Important:** the Login name must be preceded with XBR_
   - Password- Enter the password for the XBRLoader login account.
   - Confirm Password – Re-enter the password for the XBRLoader login account.
6. You can click the Review tab to review your entries.
7. Click Save. Xcenter's BroadcastManager detects the new configuration and updates itself and the Xcenter cluster. The system returns to the Broadcast Management screen, with the newly configured Broadcaster on the list.

> Important: The XBRLoader password will expire when the specified password expiration frequency days have elapsed. You MUST reset the password and enter the new password in the Xcenter Broadcaster Manager or the XBRLoader will no longer load data.

Troubleshooting

If there is a data transmission failure by the XBRLoader, you can check the TRN_POSLOG_WORK_ITEM table in the Xstore Office Replication database to see if it was caused by an incorrectly entered or expired

password. All errors are displayed in TRN_POSLOG_WORK_ITEM.ERROR_DETAILS, including authentication errors.

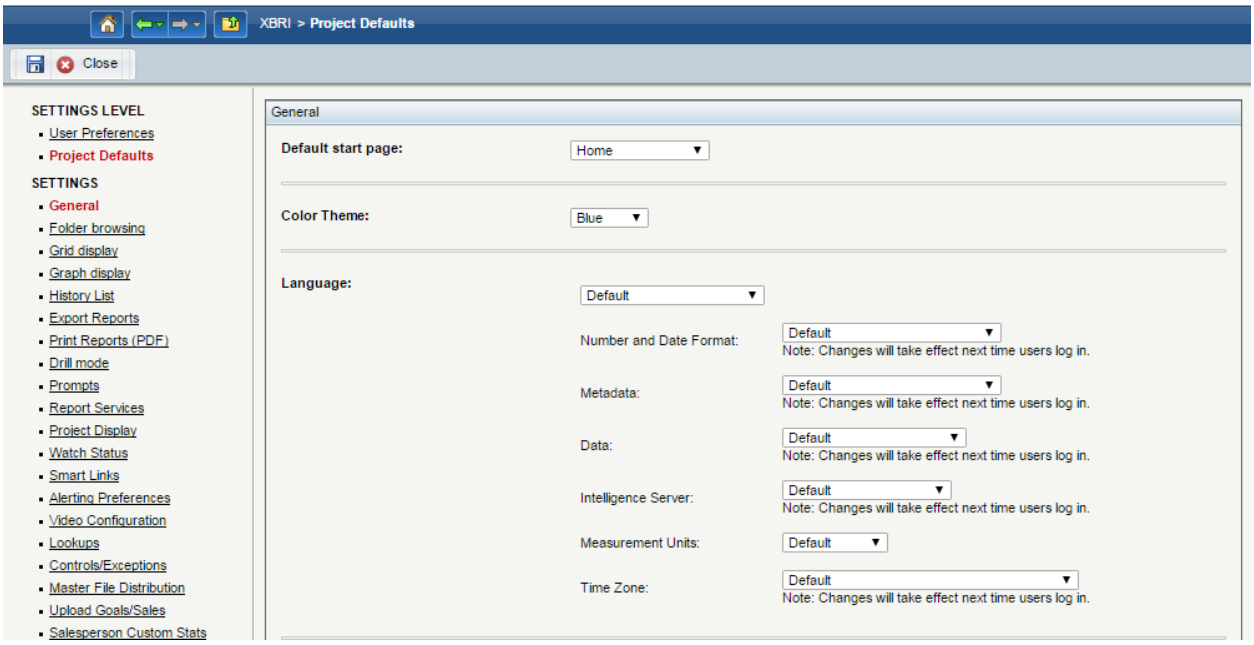
3

Application Configuration

Set Project Language Defaults

The language defaults for your site are configured during installation according to site requirements. Customer Administrators can change the language defaults at the project level. Individual users can change their language preferences using Admin, User Preferences.

1. Log in to XBR^i as the Customer Administrator.
2. From the Admin menu, choose **Project Defaults.**
3. On the General page, select the default language for the project from each of the drop-down menus:



Project Defaults – General – Language

Language: Specify the language in which to display the screens in the application. You can also specify a number of locale and internalization options individually, if necessary. Otherwise, the main Language setting is all that you need to set.

Number and Date Format: Specify the language in which to display numbers and dates in the application. This setting, along with the Time Zone setting, ensures that object creation/modification dates and times are converted to your local time if the project information is in another time zone.

> **Note**: The **Number and Date Format** and **Time Zone** settings do not affect the report execution dates and times shown in the History List.

Metadata: Specify the language in which to display the project metadata, such as attribute names.

Data: Specify the language in which to display the project data, such as attribute elements.

Intelligence Server: Specify the language in which all messages from the Intelligence Server are displayed.

Measurement Units: Specify the unit of measurement that should be used for horizontal and vertical rulers, the alignment grid, and the measurement and positioning of objects.

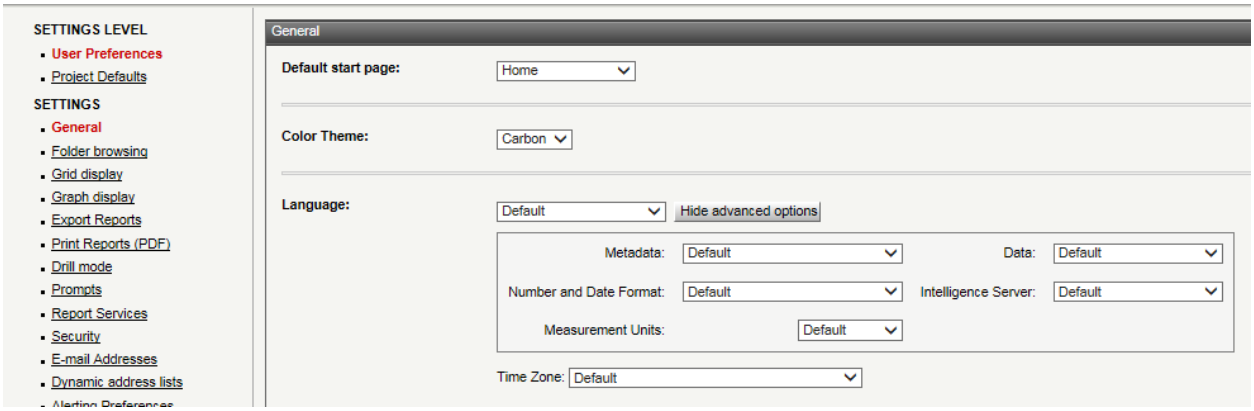
Time Zone: Specify the time zone in which you work.

4. Click **Apply** to apply the changes.

Set User Language Preferences

You can also set language preferences at the individual user level. Any user with the privileges to set General User Preferences can set language preferences that apply to just that user.

1. From the Admin menu, choose User Preferences.
2. On the General page, select the following language preferences:



User Preferences - General - Language

Language: From the drop-down list, select the language in which to display pages.

You can also specify a number of locale and internalization options individually, if necessary, as shown below. Otherwise, the main Language setting is all that you need to set.

Time Zone: Specify the time zone in which you work. The default setting is Greenwich Mean Time (GMT).

When you click **Display Advanced Options**, the follow options are displayed:

Metadata: Specify the language in which to display the project metadata, such as attribute names.

Data: Specify the language in which to display the project data, such as attribute elements.

Number and Date Format: Specify the language in which to display numbers and dates. This setting, along with the Time Zone setting, ensures that object creation/modification dates and times are converted to your local time if the project information is in another time zone.

> **Note:** The Number and Date Format and Time Zone settings do not affect the report execution dates and times shown in the History List.

Intelligence Server: Specify the language in which all messages from the Intelligence Server are displayed.

Measurement Units: Specify the unit of measurement that should be used for horizontal and vertical rulers, the alignment grid, and the measurement and positioning of objects.

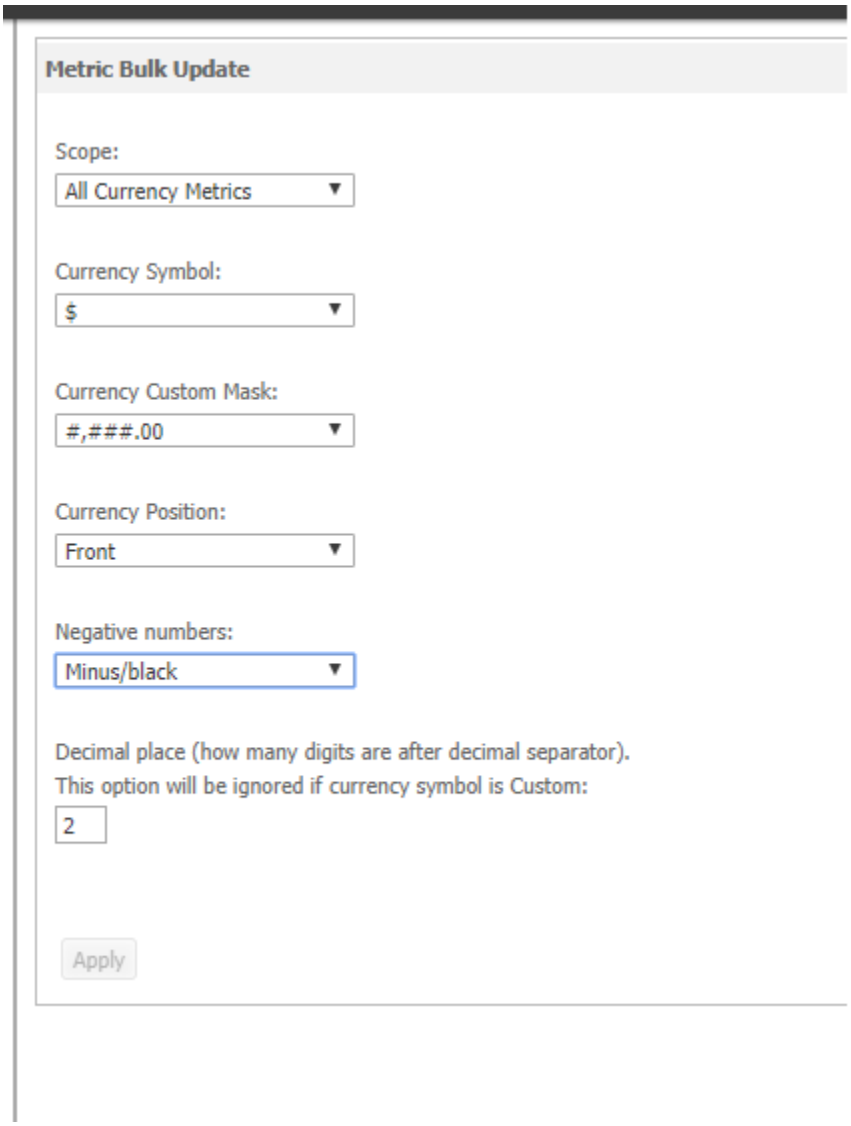
Apply Updates for Currency Metrics

If you are using multiple currencies in your project, set the defaults applied to currency metrics in the Project Defaults, Metric Bulk Update page. This lets you set default formats for local, common or all currency metrics. This includes defaults for symbol, custom mask, position, negative numbers, and

decimal place. The changes are displayed wherever currency is shown in the application, such as in reports, documents, dashboards, and control points.

> **Note:** XBR*i* is updated with currency exchange rates on a schedule determined by the customer. The customer data feed is provided by the customer. The schedule for updating the database with the customer exchange rate data is implemented by the Oracle Enablement team.

1. Log in to XBR*i* as the Customer Administrator.
2. From the Admin menu, choose Project Defaults**.**
3. Under Settings, choose Metric Bulk Update.



Project Defaults – Metric Bulk Update

4. Make selections for the following options:

   Scope

   Select the group of metrics to which you want to apply bulk updates from the drop-down list. Available options are:

All Currency Metrics - Applies to both Local and Common Currency Metrics.

Local Metrics only - Applies to the metrics based on amounts that will display a currency except for those in the Common Currency folder.

Common Metrics only - Applies to the metrics based on amounts that will display a currency only for those in the Common Currency folder.

Currency Symbol

From the drop-down list, select the symbol associated with the metric currency. The list of symbols is determined by the languages available for your project.

Note: If you choose Custom as the currency symbol, the symbol is based on the selection for Number and Date Format in User Preferences. For example, if the Number and Date Format is Italian, the Custom Currency symbol will be for the Euro. See: General Preferences in the XBR^{i} Administrator online help for more information on setting the Number and Date Format preferences.

Currency Custom Mask

From the drop-down list, select the characters to use to mask currency amounts. Available options are:

#,###.00

#,###.##

#.###,##

Currency Position

From the drop-down list, select the currency position to apply to the metric currency. Available options are:

Front - For example, $123.45

Back - For example, 123.45$

Front and space - For example, $ 123.45

Back and space - For example, 123.45 $

Negative Numbers

From the drop-down list, select a format for displaying negative numbers. Available options are:

Minus/black

Red and parentheses

Red

Black and parentheses

Decimal Place

In the box below the Decimal Place label, enter the number of digits to display after the decimal separator.

> **Note:** This option will be ignored if the Currency Symbol is Custom.

Click **Apply** to apply the settings.

Configure for Receipt Viewer

The Receipt Viewer lets you view and print a copy of a receipt for a transaction. The Receipt Viewer icon is available on the Reports toolbar when a report has been run that contains the following transactions data: Org ID, Trans ID, Register Number, and Trans Date, and when the user has been granted access to the new Receipt Viewer feature in User Manager. When you select a transaction in a report and click the Receipt Viewer icon, a prompt is displayed for logging in to Xstore Admin. After logging in, the receipt for the transaction is displayed in the Xstore Admin Receipt Viewer. You have the options to print or save the receipt. The customer must have XBRi integrated with Xstore, and users must be able to log in to Xstore to use this functionality.

To Enable Receipt Viewer:

1. Log in to XBRi as a customer administrator.
2. From the Tools menu, choose Data Editor.
3. Select the LP Variables table, click the **Actions** icon, and choose Maintain.
4. Depending on whether you are connecting to a Cloud or on-prem Xstore installation, locate the row for the relevant variable:

   receipt.url.basic – on prem

   receipt.url.ics – Cloud
5. In the row of the variable, click the **Actions** icon and choose Edit. This displays the LP Variables – Edit Record screen.
6. In the VAR_VALUE field, enter the host name for the Receipt Viewer in Xstore.

Configure for Master File Distribution

The Master File Distribution feature allows customers to send subscription reports to recipients who are not defined users in XBR^i. This is done through dynamic address lists that are derived from reports based on the core master tables for Store, District, and Region for Retail installations and District and Location for Food and Beverage installations. When you create a dynamic address list, it becomes available on the Recipients list for creating email subscriptions.

The reports used for creating dynamic address lists are stored in the Shared Reports > Master File Distribution folder. They include columns for Email, Device ID and Linked User ID. The Device ID column is initially populated when the application is installed or when new rows are added to the master files.

The Linked User ID columns are updated in the master files when the MFD nightly update process runs. For master files with fewer than 30 rows of data, you can update these columns through the application.

This section contains the steps from enabling master file distribution through using dynamic address lists.

Step A: Give Access to the MFD Feature:

In the XBR^i User Manager, turn on the Master File Distribution feature for the administrator users.

To give users and groups access to the Master File Distribution feature:

1. Log in to XBR^i as a customer administrator.

2. From the Admin menu, choose **User Manager**. This displays the User Manager.
   - If you want to give access at the group level, click the **Edit** icon  in the Group row.
   - If you want to give access at the user level, expand the group, and click the **Edit** icon  in the user row.
3. This displays the Group Editor for a group or the User Editor for a user.
4. Click the **Feature Security** tab.
5. Select the check box next to **Master File Distribution**.
6. Click **OK**.

> **Note:** By default, this feature will be On.

Step B: Verify that Key Columns and Security Filter Key Attributes are Correct

Several attributes are used specifically for Master File Distribution. For Retail, they are Store MFD, District MFD and Region MFD. These attributes are used in the reports on which the dynamic address lists are based.

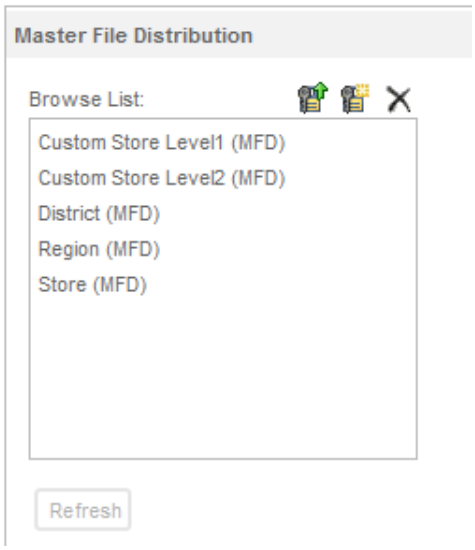
After XBR^i is installed and MFD is enabled for the project, you need to review the Master File Distribution settings in Project Defaults and verify that MFD mapping matches the key columns for each of the master tables. For example, if Store is not unique, Store and Division should be selected as keys.

Also, each of the mappings has a security filter associated with it. The security filter ensures the data sent is only for that one store or one district, and so on. These also need to be correct for the customer site. If not, contact, your Oracle representative to have them modified.

> **Note:** If you change the security filter after an MFD update has already run, the new change will not take place until the previous MFD users and MFD filters have been deleted and the process is run again. If you need to delete MFD users or filters, use the Delete function in the Project Defaults – Master File Distribution page. See the steps that follow for more information.

To verify key columns are correct:

1. Log in to XBR^i as a customer Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**. This displays the Master File Distribution page.



Project Defaults – Master File Distribution Page

4. For each table in the Browse List, select the table and click the **Define key columns in database table** icon.
5. Verify that the key columns are correct.
6. When you are done verifying the key columns, click **OK**.

To verify key attributes in the security filter are correct and modify if needed:

1. Log in to XBR*i* as a customer Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**.
4. For each table in the Browse List, select the table and click the **Define key attributes for Security Filter** icon.
5. Verify that the key attributes are correct. Note: These attributes must exist in the master table you are modifying, such as Store and Division in the Store Master table.
6. When you are done verifying the key attributes, click **OK**.

> **Note:** Only Oracle XBRAdmin Core Administrators can modify key columns and security filters.

If the key columns or security filters are modified, you must delete and refresh the data.

To delete MFD users and Linked User IDs already set up by the program:

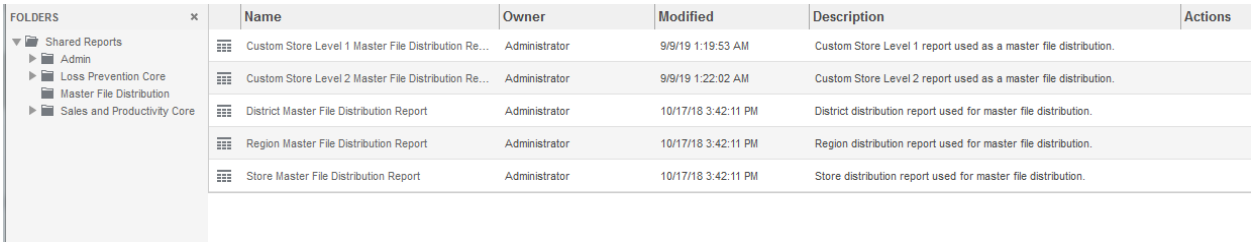
1. Log in to XBR*i* as a customer Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**.
4. Select each attribute in the Browse List that you want to delete, and click the **Delete** icon.
5. When you are done deleting attributes, click **OK**.

Master File Distribution Reports

The reports used for creating dynamic address lists are stored in the Shared Reports > Master File Distribution folder. They each contain the MFD attributes that are derived from core master tables for Store, District, and Region for Retail installations. They include columns for Email, Device ID and Linked

User ID. The Device ID column is populated when the application is installed or upgraded. The Linked User ID column is updated when the nightly MFD update process is run or for master files with fewer than 30 rows of data, when you run the **Refresh table** option in the Project Defaults > Master File Distribution page.

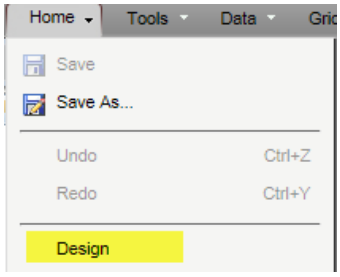
The dynamic address lists that you create in the next step use the addresses associated with the Linked User IDs from the Master File Distribution reports in the Shared Reports > Master File Distribution folder.



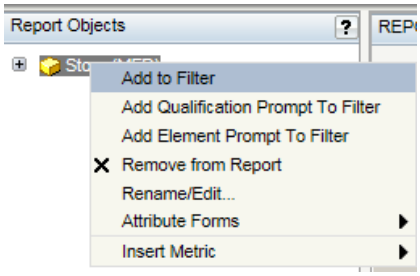
- You can create copies of these reports to add filters to create a smaller distribution subset of the Master file, such as all stores in a particular state.
- Each report must have one of the Master File key attributes, for example, Region, MFD, linked user ID, and email.
- Any security filters that are applied to the contact's linked user are also applied to any reports and documents that are sent to the address.

Example: Modifying a Store Master File Distribution report

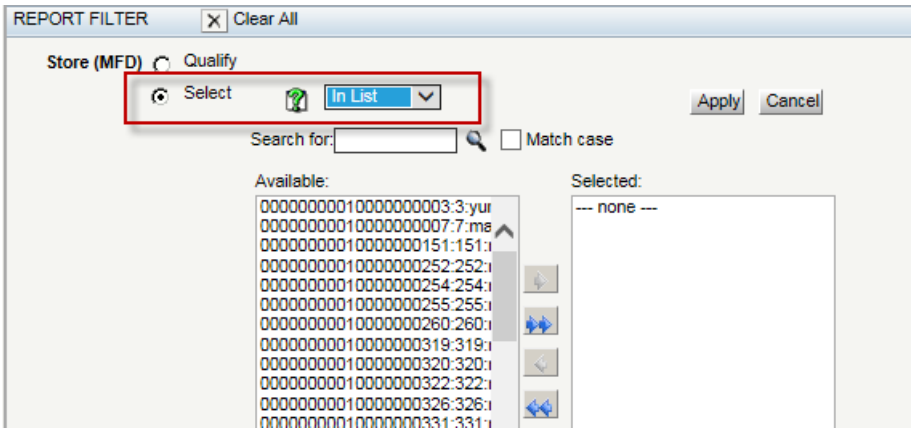
1. Go to the Shared Reports > Master File Distribution folder.
2. Open the Store Master File Distribution report.
3. From the Home menu, select **Design**.



4. If the Report Filter panel is not displayed above the report, click the **Filter** icon. 
5. From the Report Objects panel, locate the Store attribute.



6. Right click on the Store attribute and click **Add to Filter** from the menu. This displays a Report Filter panel:



Report Filter panel

To create the list of elements which the filter will use to filter data:

1. Click **Select**.
2. From the In List drop-down list, select one of the following:
   - To define what attribute elements the filter should include data for, select **In List**.
   - To define what attribute elements the filter should exclude data for, select **Not In List**.
3. The Available pane displays the elements that belong to the store attribute chosen for this filter.
4. Select a store and then click the right arrow to move it to the Selected pane. Press **CTRL** to select multiple individual stores or **Shift + click** to select a series of stores. If the Available list contains a large number of stores, use the Search for field to locate the elements to select.
5. Click **Apply** to apply the filter.
6. Click the **Save As** icon. 
7. In the Save As dialog, enter a new name for the report, and click **OK**.

Step C: Create Dynamic Address Lists

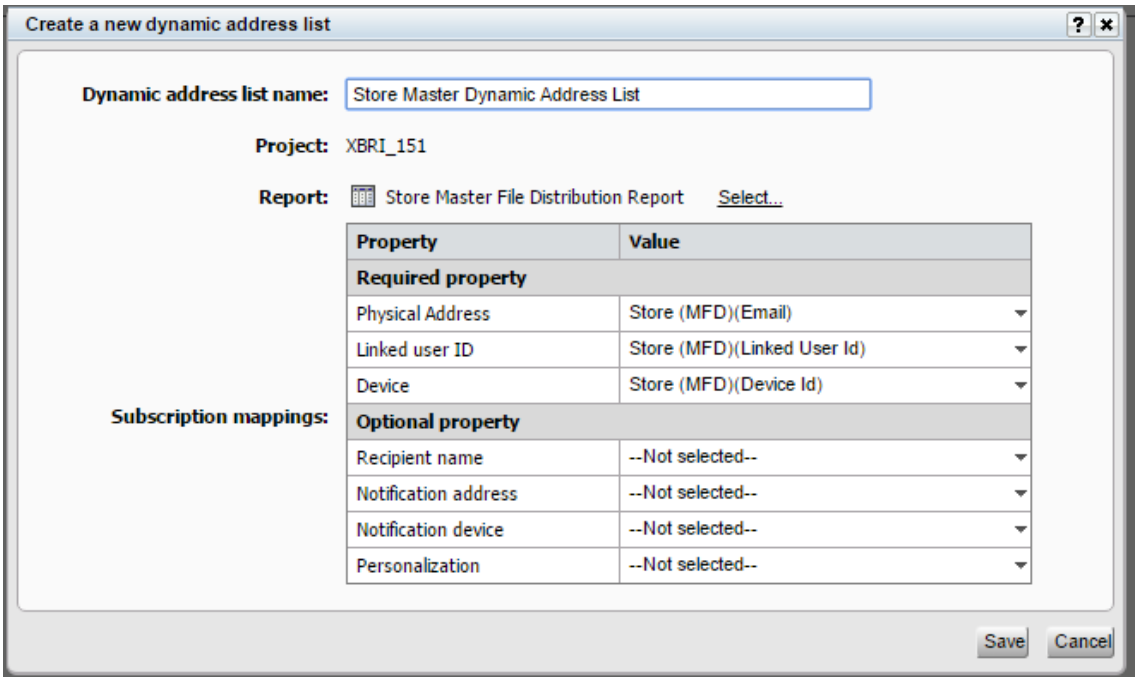
This step explains how to create Dynamic Address lists for the customer. Each Dynamic Address list is linked to one of the reports in the Shared Reports > Master File Distribution folder.

The emails that will be sent to recipients on dynamic address lists are determined by the reports to which they are linked. If you need to create a dynamic address list with a different set of email recipients than those in the MFD reports provided by Oracle, you will need to create or modify the existing MFD reports. See: Master File Distribution Reports for an example of how to modify an MFD report.

> IMPORTANT! The subscription processing cannot handle more than 2000 users at one time. If the master file list of recipient users exceeds or comes close to 2000, the distribution reports must be filtered and run at different times.

To create Dynamic Address Lists:

1. Log in to XBR^i as a customer Administrator or Manager.
2. From the Admin menu, choose **User Preferences**.
3. Under Settings, choose **Dynamic address lists**.
4. Click the **Add a new dynamic address list** link.



Dynamic Address list

5. Click the **Select…** link next to **Report:**
6. Navigate to the Shared Reports > Master File Distribution folder.
7. For each of the reports in the folder, create a dynamic address list by completing the steps that follow.
   a. Select the report and click **OK**.
   b. Enter a name for the list in the **Dynamic address list name** field.
   c. Under the Required property settings, make sure the correct values are selected. For example, for the Property, Physical Address, in a list containing the District attribute, the corresponding Value should be District (MFD) (Email).

> **Note:** the lower portion of the screen under the **Subscription mappings, Optional property** settings is not used in XBR^i.

   d. Click **Save**.

The new list will be displayed under Dynamic address lists in User Preferences. Repeat step 7, a-d for all of the reports in the Master File Distribution folder.

Step D: Populate the Master File Tables

In order for Dynamic address to work correctly, the master file tables must be populated with a linked user ID for each row in the master file. The master file tables are updated daily through a process that is scheduled when the application is installed. For master files with fewer than 30 rows of data, you can use XBR^i Project Defaults, Master File Distribution and run the **Refresh table** option. This option could be used if you wanted to include users that have just been added to master file table to a Dynamic Address list before the daily scheduled MFD update process is run.

> **Note:** If a file has more than 30 rows and you try to use the Refresh Table command in Project defaults, you will see a message that lets you know the file is too large to process.

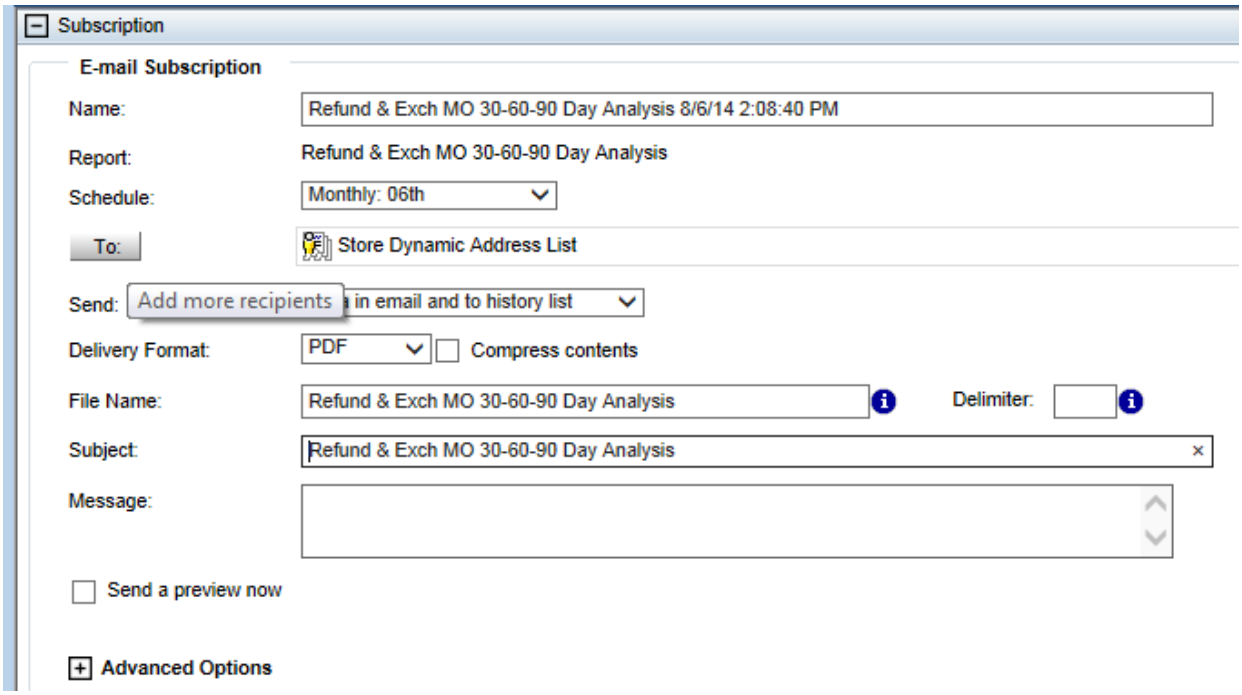
To populate the linked user ID in the Master File tables from Project Defaults:

1. Log in to XBR[i] as a customer Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**.
4. Select the master table you want to update in the Browse List and click the **Refresh table <Table name MFD>** button.

Step E: Use Dynamic Address Lists in Subscriptions

After you have completed the steps for configuring Master File Distribution, the dynamic address list will be available as a new recipient in the Add more recipients TO option when creating and editing subscriptions.

> IMPORTANT! When creating the subscription, the attributes (keys) used to define the master file in the project defaults must be in the report or selected in the hierarchy prompt used in the subscription. For example, if store and division are selected keys, these attributes must be included in the report subscription.



E-mail Subscription Window

Video Linking Configuration

The video linking feature in XBR^i allows users to retrieve the digital video that corresponds to one or more transactions. Video vendors provide the video services to customers that are used to record transactions at the point of sale and to display selected video at a later time.

Administrator users can use the Video Vendor Configuration table in the Data Editor to configure the connectivity for video vendors currently being used and to add and delete video vendors.

Administrator users can also set system variables for video vendors in the Data Editor – System Variable Settings table and configure cameras and registers in the Data Editor – Register Master table.

Before you begin, get the following information from either the customer or the video vendor:

- Code for the SP_PRO_VIDEO procedure, if the vendor is not supported by XBR^i
- Values for the MST_REGISTER_TAB table: DEVICE_STRING, VIDEO_FLAG, VIDEO_VENDOR and SITECODE (optional if web-based video)

For a list of the XBR^i supported video vendors, contact the XBR^i product manager.

Adding a New Vendor

> **Note:** Supported video vendors are already included in the SP_PRO_VIDEO procedure. You do not need to complete this step if the vendor appears on the supported vendors list, but this list is subject to change. Check with the account manager or database administrator to see if a vendor has been added.

To configure video vendor connectivity:

5. Log in to XBRi as a customer administrator.
6. From the Tools menu, choose Data Editor.
7. Select the Video Vendor Configuration table, click the **Actions** icon, and choose Maintain. In the Video Vendor Configuration – Edit Record screen, enter or modify the connectivity values. Required fields are indicated with an asterisk *
8. Click Save to save the changes.

Setting Video Vendor Variables in Data Editor – System Variable Settings

Several video vendors require specific information, such as usernames and passwords, in order to use their services. This general information is held in the Data Editor – System Variable Settings table. These variables must be set before video vendor services can be used for those requiring specific variable settings.

In addition to the vendor-specific variables, there are a few general variables that may need to be configured. They are:

PROACT	**REGRECEIPT**
PROACT VIDEO	VIDEO_VENDOR
PROACT VIDEO	SECONDS PRIOR
PROACT VIDEO	SECONDS AFTER
PROACT VIDEO	LENGTH

The variables that need to be set depend on your video vendor.

To configure video vendor variables:

1. Log in to XBRi as a customer administrator.

2. From the Tools menu, choose Data Editor.
3. Select the System Variable Settings table, click the **Actions** icon, and choose Maintain.
4. In the row of the video vendor or variable that you want to configure, click the **Actions** icon, and choose Edit.
5. In the Edit Record screen, edit the variable settings that you want to change, and choose Save.

Configuring Cameras and Registers

The Data Editor – Register Master table stores information that maps cameras to registers. You need to get the following information from the customer or video vendor to enter into this table:

DEVICE_STRING – the camera number

ACTIVE_FLAG – Indicates whether the video for the register in enabled, yes (Y) or no (N)

VIDEO_VENDOR – the video vendor directs the application to call the appropriate video viewer for this store/register combination.

SITECODE (optional if web-based video) – The IP address for the store's video system

To configure cameras and registers:

1. Log in to XBRi as a customer administrator.
2. From the Tools menu, choose Data Editor.
3. Select the Register Master table, click the **Actions** icon, and choose Maintain.
4. Click the Add icon to add a register, or to edit a register, click the Actions icon in the row of the register that you want to edit and choose Edit.
5. Enter the values for the new or edited record and click Save.

Attributes for Video Linking

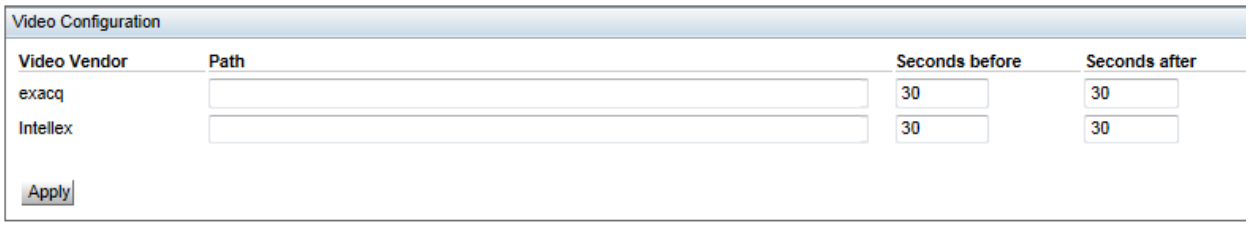
There are six core attributes that are defined in the ADM_LP_VIDEO_ MAPPING table such as Trans, Trans Time, Division, Trans Date, Store, and Register. These attributes must be defined in a report in order to enable video linking for that report. When you select a report with video enabled, the Video link in the report Tools menu or toolbar is enabled.

Entering the Path to the Video Vendor in Project Defaults

The Video Configuration Defaults page lets you modify the local paths to the executable files of the video viewers used when executing video links. You can also specify the number of seconds before and after the transaction to be included in the video.

To set video linking project defaults:

1. From the Admin menu, choose Project Defaults.
2. Under Settings, click **Video Configuration**. This displays the Video Configuration page:



Video Configuration Page

3. Edit the Path for the Video Vendor if necessary. This sets the local path to the video viewer used when executing a video link.

4. Change the number of Seconds Before or Seconds After defaults if necessary. This determines the default number of seconds before and after the transaction time when generating the start and end times in the Video Queue.
5. Click **Apply**. This applies the information and saves it to the ADM_LP_VIDEOCONFIG table.

Viewing Logs

Administrator users can choose the Log Viewer option from the Tools menu to view or download logs, organized by group and to manage log settings.

To view logs:

1. From the Tools menu, choose **Log Viewer**.
2. In the Log Viewer, select the type of log you want to view from the Groups drop-down list.
3. Select a log from the list, and click **Load** to view it, or **Download**, to download it as a file.

> **Note:** If a log is over 1mb in size, it is recommended that you choose the Download option rather than the Load option to view the log. Choosing the Load option for a very large file may result in slow processing.

Logs that can be accessed include those from the following groups:

Archived Imports - archived imported files in xbr-loader queue/archive

Failed Imports - processed imported files that failed in xbr-loader

ODI API Logs

ODI Currency Master Logs

ODI Current Event Log

ODI Customer Master Logs

ODI DTV Status – Overall DTV status log

ODI Emp Master Logs

ODI EmpMaster Logs

ODI Goal Logs

ODI Hours Worked Logs

ODI Inventory Logs

ODI Output Archive

ODI Prior Event Log

ODI Register Master Logs

ODI SKU Master Logs

ODI Staging Logs

ODI Store Master Logs

ODI Supplier Master Logs

ODI TLOGA Logs

ODI TLOGB Logs

ODI Token Master Logs

ODI Traffic Logs

Pending Queued Imports - pending imported files in xbr-loader/queue

Pending Staged Imports - pending imported files in xbr-loader/out

Successful Imports - successful files processed in xbr-loader

XBRI Database

PRO_BATCH_CONTROL (ETL Server) – Logs showing batches processed

PRO_EVENTLOG (ETL Server) – Logs showing procedure statuses or errors

PRO_SYS_PURGELOG (ETL Server) - Logs showing historical purges

SCI_MSG_LOG_VIEW (ETL Server) – Logs showing overnight science model execution status

Log Settings

Administrator users can add and delete logs from the Log Viewer and edit log properties using the Log Settings options.

Storage - From the Storage drop down list, specify the server storing the log files you want to view, or select All to view log files on all servers.

To add a log file:

1. In the Log Viewer window, click **Settings**.
2. Under Available Logs, click the **Add** button. This displays the Add dialog.
3. Enter information in the following fields for the log you want to add (mandatory items are noted with *):

   ***Group Name** - Enter the name of the group on the server to which the log belongs.

   ***Log Name** - Enter the log name as it appears on the server.

   Log Description - Enter an optional description of the log.

   Log Type - Select the log type from the drop-down list.

   ***Server** - From the drop-down list, select the server where the log is located.

   ***Log Location** - Specify the log location on the server from the following: /var/, /apt/, /usr/local/ **Note:** This field only applies to logs of the type: file.

   ***Log Matching Wildcard** - Select the **RegEx?** Checkbox if you want to populate the **wildcard:** name with a regular expression like: [[\D]*[\d]*]*[.]log. These are special characters used to match the file name. You can change the wildcard extension to any acceptable file type, such as: .zip, .sh, .txt, .docx, .cmd, .log **Note:** This field only applies to logs of the type: file.

To delete a log file:

1. In the row of the log you want to delete, click the **Delete** icon.
2. In the Delete message, click **Accept** to delete the log from the Log Viewer.

To edit the log information:

1. In the row of the log you want to edit, click the **Edit** icon. This displays the Edit dialog.
2. Enter information in the following fields for the log you want to edit (mandatory items are noted with *):

   ***Group Name** - Enter the name of the group on the server to which the log belongs.

   ***Log Name** - The log name as it appears on the server. This cannot be edited.

   Log Description - Enter an optional description of the log.

   Log Type - The log type. This cannot be edited.

***Server** - The server where the log is located. This cannot be edited.

***Log Location** - Specify the log location on the server from the following: /var/, /apt/, /usr/local/ **Note:** This field only applies to logs of the type: file.

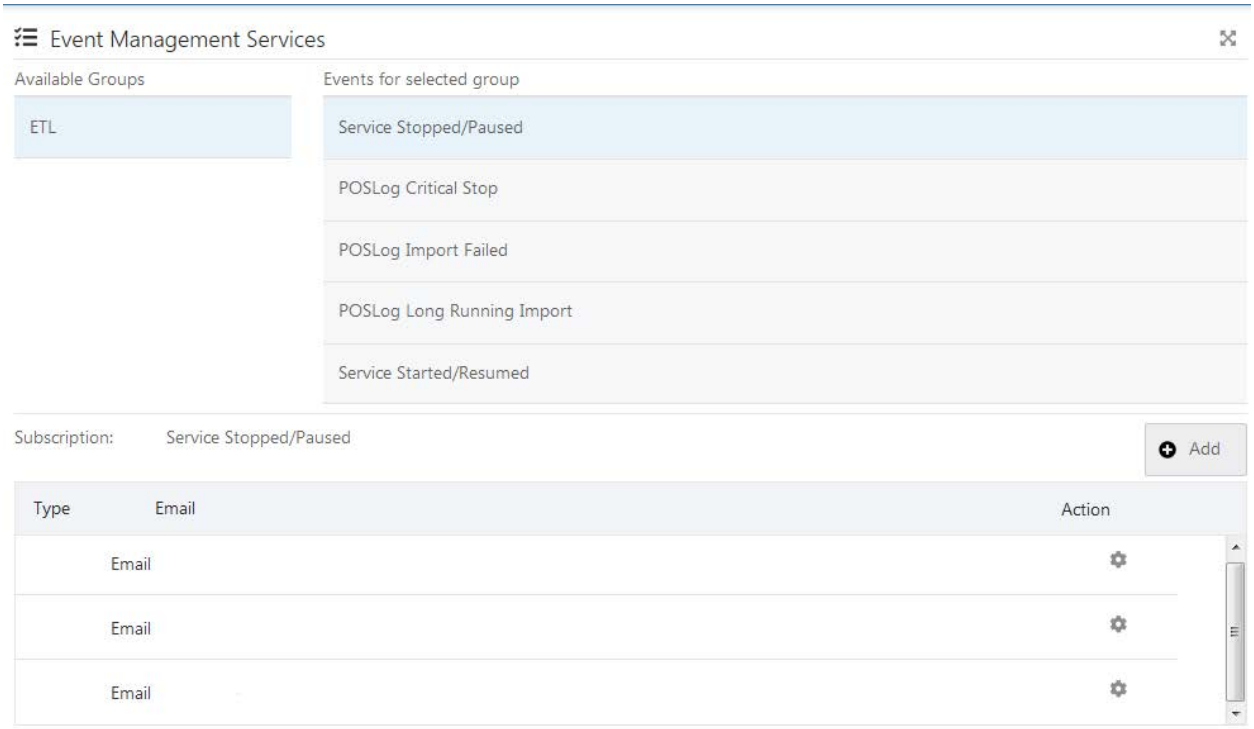
***Log Matching Wildcard** - Select the **RegEx?** Checkbox if you want to populate the **wildcard:** name with a regular expression like: [[\D]*[\d]*]*[.]log. These are special characters used to match the file name. You can change the wildcard extension to any acceptable file type, such as: .zip, .sh, .txt, .docx, .cmd, .log **Note**: This field only applies to logs of the type: file.

Event Management

Administrator users can manage event subscriptions for web service users through the Tools menu, Event Management option. The Event Management Services screen shows all of the current events available in the system and the groups to which they belong. When you select an event in a list, the users subscribed to the event are displayed in a Subscription list. Security is checked every time an event is selected, and the subscriptions in the Subscriptions list are updated. Users with permission to maintain the event can add, edit, and delete subscriptions.

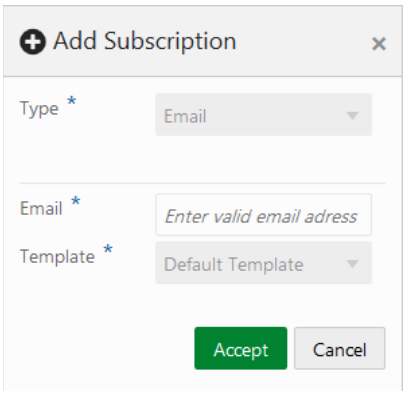
To add a subscription to an event:

1. From the Tools menu, choose Event Management. This displays the Event Management Services screen:



Event Management Services screen

2. Under Available Groups, select the group to which the event belongs, and select the event in the Events for selected group list. This displays the subscribers to the event in the Subscription list.
3. Click the **Add** button. This displays the Add Subscription dialog:



Add Subscription dialog

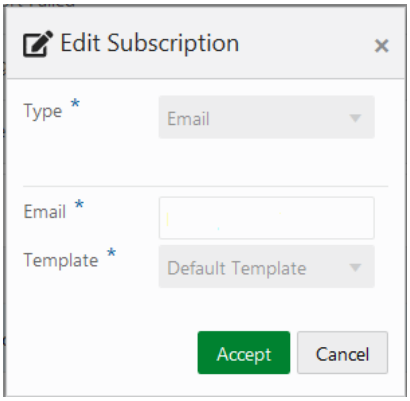
4. In the Email field, enter an email address for the new subscriber.

   The Type and Template fields contain the default values, Email and Default Template, and are not editable.

5. Click **Accept** to add the subscription. This closes the dialog and returns you to the Event Management Services screen, with the new subscriber added to the Subscription list. If the subscriber already exists, you will be alerted with a message

To edit a subscription:

1. In the Subscription list, click the **Action** icon in the row of the subscription you want to edit, and choose **Edit** from the drop-down menu. This displays the Edit Subscription dialog:



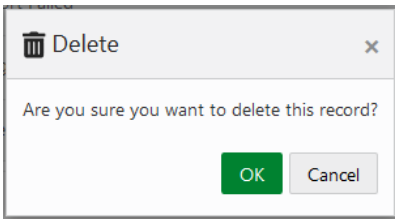
Edit Subscription dialog

   The Edit Subscription dialog contains the same fields as the Add Subscription dialog.

2. Make the changes that you want to the address in the Email field
3. Click **Accept**. This saves the changes and returns you to the Event Management Services screen.

To delete a subscription:

1. In the Subscription list, click the **Action** icon in the row of the subscription you want to delete, and choose **Delete** from the drop-down menu. This displays a Delete message:



Delete Subscription message

2. Click **OK** to delete the subscription and return to the Event Management Services screen. The subscription will be removed from the list. If you do not want to delete the subscription, click **Cancel** to close the message.

Refreshing iCubes

Administrator users can choose Refresh iCubes from the tools menu to see the full list of iCubes and their last updated date, size, and status. You can refresh an iCube that you select from the list.

To refresh iCubes:

1. From the Tools menu, choose **Cube Refresh**.
2. From the list, select the iCube that you want to refresh.
3. Click **Refresh iCube**.
4. This refreshes the iCube. The Date Last Updated is changed to the date and time you refreshed the iCube.

About iCube Status

An iCube can have many different statuses at the same time, for example Active, Loaded, Filed are three different statuses that can appear together.

There are six statuses that can be shown in the status column:

Active - The cube is available, but not necessarily loaded to Intelligence Server memory.

Dirty - This status occurs if the copy of an iCube's data in secondary storage is not up to date with data in Intelligence Server memory. This can occur if an iCube is updated in Intelligence Server memory but the new data is not saved to secondary storage.

Filed - The cube is available in the project, but is not necessarily Active or Loaded.

Information Dirty - This status occurs if iCube monitoring information changes, and this information is not updated in secondary storage. Monitoring information includes details such as the number of reports that have accessed the iCube.

Loaded - The cube is loaded in Intelligence Server memory.

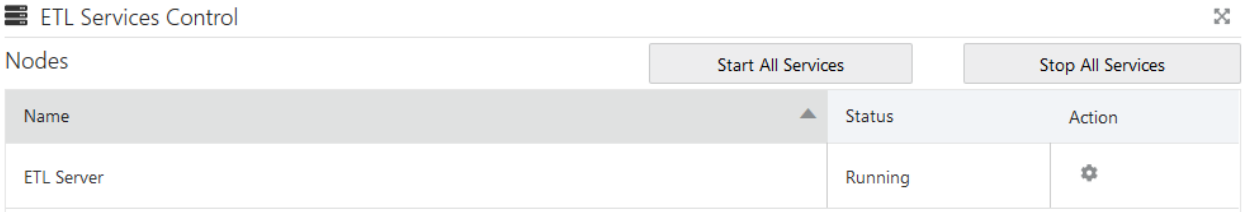
Processing - This status denotes that certain tasks are currently being completed.

Controlling ETL Services

The ETL Control option on the Tools menu is available only for customers using the new ETL process. It allows Administrator users to control ETL services from within the application. You have the options to stop or start all services at once, and to stop, start, pause or resume one service node at a time. The actions available for a node depend on the state of the service. For example, if the node status is Stopped, the only action available will be Start. Each time you initiate a control option, you are prompted with a message that asks if you want to continue. If an error occurs while data is being loaded, an error message is displayed. See the *ETL Data Import and Maintenance Guide* for more information on the new ETL process.

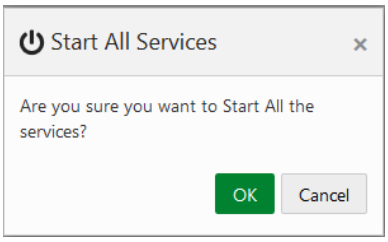
To start all services:

1. From the Tools menu, choose ETL Control. This displays the ETL Services Control screen.



ETL Services

2. Click the **Start All Services** button at the top of the screen. This displays the following message:

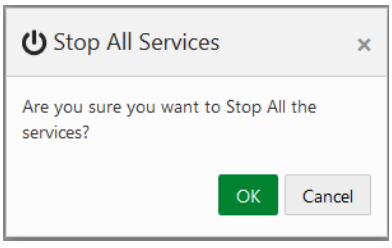


Start All Services Confirmation prompt

3. Click **OK** to start all services. The status for each service in the list will be set to Running. Click **Cancel**, if you want to close the message without starting all services.

To stop all services:

1. Click the **Stop All Services** button at the top of the screen. This displays the following message:

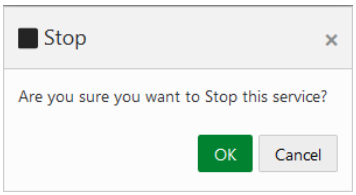


Stop All Services Confirmation prompt

2. Click **OK** to stop all services. The status for each service in the list will be set to Stopped. Click **Cancel**, if you want to close the message without stopping all services.

To stop a single service:

1. In the Nodes list, select a service that is in Running status.
2. Click the **Action** icon in that row, and choose **Stop**. This displays the following message:

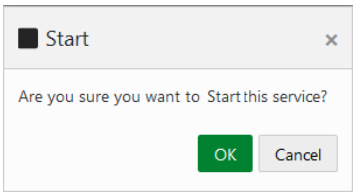


Stop Service prompt

3. Click **OK** to stop the service. The status for the service in the list will be set to Stopped. Click **Cancel**, if you want to close the message without stopping the service.

To start a single service:

1. In the Nodes list, select a service that is in Stopped status.
2. Click the **Action** icon in that row, and choose **Start**. This displays the following message:

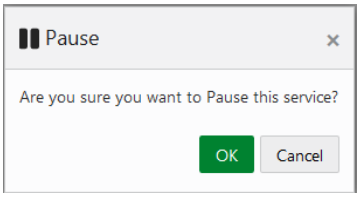


Start Service prompt

3. Click **OK** to start the service. The status for the service in the list will be set to Running. Click **Cancel**, if you want to close the message without starting the service.

To pause a single service:

1. In the Nodes list, select a service that is in Running status.
2. Click the **Action** icon in that row, and choose **Pause**. This displays the following message:

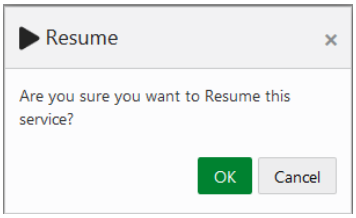


Pause Service prompt

3. Click **OK** to pause the service. The status for the service in the list will be set to Paused. Click **Cancel**, if you want to close the message without pausing the service.

To resume a single service:

1. In the Nodes list, select a service that is in Paused status.
2. Click the **Action** icon in that row, and choose **Resume**. This displays the following message:



Resume Service prompt

3. Click **OK** to resume the service. The status for the service in the list will be set to Running. Click **Cancel**, if you want to close the message without resuming the service.

Managing ODI Settings

Administrator users can choose the ODI Settings option from the Tools menu to stop, start, and reset ETL ODI session data and to edit the default settings in individual load plans. When you click the ODI Settings menu option, the current state of the ODI service (running or not running) is loaded into the application. The available load plans are listed in the ODI Mappings section.

> **Important:** Changes are not allowed to any of the Core ODI framework objects. If a change is needed, the object in question must be used as a template, that is, the original object can be downloaded, changed and before being uploaded, both the name and Global ID must be changed as well. For detailed information, see the ODI Framework Rules Guide on MOS.

The following options and actions are available:

Service

Stop - Click **Stop** to stop the ODI agent. The ODI agent is responsible for scheduling and executing load plans. If the agent is stopped, no load plans will be executed. The status below changes to: Service isn't currently running.

Start - Click **Start** to start the ODI Service. The status below changes to: Service is currently running. This option is used to reset the service once issues that caused it to fail have been corrected.

Reset/Clean ODI Session Data

Start - This option is used to reset ODI session data (such as clearing error logs) if a load plan failed before it finished. You use this command after you have corrected the issues with a failed load plan.

When you click **Start**, the Reset function cleans out the ODI DTV folders and place fresh finished.txt files where appropriate. A busy screen is displayed while the reset process runs. By default, these areas are reviewed:

a. status
b. TRANSFORMS/API/status
c. TRANSFORMS/CURRENCYMASTER/status
d. TRANSFORMS/CUSTOMERMASTER/status
e. TRANSFORMS/EMPMASTER/status
f. TRANSFORMS/EMPMST_NONCORE/status
g. TRANSFORMS/GOAL/status
h. TRANSFORMS/HOURSWORKED/status
i. TRANSFORMS/INVENTORY/status
j. TRANSFORMS/SKUMASTER/status
k. TRANSFORMS/STAGING/status
l. TRANSFORMS/STOREMASTER/status
m. TRANSFORMS/STOREMASTER_NONCORE/status
n. TRANSFORMS/SUPPMASTER/status
o. TRANSFORMS/REGISTERMASTER/status
p. TRANSFORMS/TOKENMASTER/status
q. TRANSFORMS/TLOGA_1/status
r. TRANSFORMS/TLOGA_2/status

s. TRANSFORMS/TLOGB_1/status
t. TRANSFORMS/TRAFFIC/status
u. TRANSFORMS/TLOG_NONCORE_1/status
v. TRANSFORMS/TLOG_NONCORE_2/status

If any of the DTV folders contain POSCanonical.tmplt.xml, they will be restored over POSCanonical.xml

When the review is completed, the reset process connects to XBR-Loader service and asks if the service is stopped or suspended. If it is in either state, it starts or resumes it. It then resets the EOD_PROCESSING state back to 'N'

The Busy screen closes once the process is completed.

See instruction for how to Download and Replace load plan files, below. You can use the Log Viewer to look up ODI logs, and troubleshoot problems. Once the problem is resolved, click **Start** to reset ODI process.

ODI Mappings

This grid lists the available load plans by Name, along with their Description and Status (see list below), Last Changed date, and Actions available. You use the **Download** option on the Action menu to download a load plan file that needs to be modified, or use the **Replace** option to upload a modified load plan file. Use the **Start** and **Stop** options to start and stop individual load plans.

Status

Load plans can have one of the following statuses, which are displayed in the Status column:

Active - active schedules exist for this load plan.

Active for Period – schedules are active for this load plan but only during a specific period of time.

Inactive – schedules are currently inactive, the load plan will never run.

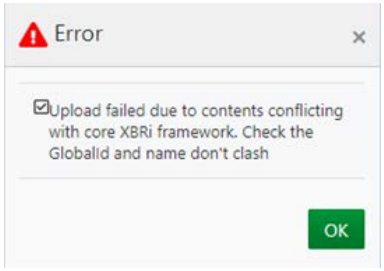
Unknown – the application has not found a schedule for the load plan.

To download a load plan file:

1. Click the **Action**  icon in the row of the load plan that you want to download.
2. Click **Download**. This displays a password prompt.
3. In the Create Password for Upload field, enter a password that meets the following criteria:
   - Contains 8-30 characters
   - Contains at least one alpha character of upper or lower case
   - Contains at least one numeric character or at least one of the following special characters: @ # % + / =
4. Click **Accept**. This downloads the file to your computer.
5. Make any needed modifications to the file. If it is a core load plan file, it will contain lists of ODI objects, and each mention of an ODI object has a Global ID and the option of an Object Name If you change a core ODI object, you must create a new object name, for example, by adding the three-digit org code to the name. The application will not overwrite a core ODI object. See Note below.

To replace a load plan file:

Note: If you attempt to replace a core load plan in which you have modified core ODI objects, but have not renamed them, an error message is displayed (see image below). The application will check to see if any of the global identifiers in the upload file match a pre-defined list of core objects. This is (where appropriate) also done with the global object name.



1. Click the **Action** icon in the row of the load plan that you want to replace, and click **Stop**, if it is enabled, to stop the load plan.
2. Click **Replace**. This displays a File Uploader dialog.
3. Drag the file that you previously downloaded and edited into the File Uploader, or click to locate the file and move it to the File Uploader.
4. In the Password field, enter the same password that you used to download the file.
5. Click **Accept**. This replaces the file.
6. Click the **Start** button on the Actions menu to restart the load plan.

About Last Changed status

The time displayed in the Last Changed column is updated based on the following actions:

- When the Status is Unknown, the Last Changed time is not updated when the user performs the Stop, Start, Replace, or Download actions.
- When the Status is Active or Inactive, the Last Changed time is updated when the user executes the Stop, Start, or Replace commands from the Action menu.
- When a load plan is uploaded through the application.
- When any configuration changes to the load plan are performed in the ODI Studio:
  - If the scheduler for a load plan in Active or Inactive status is deleted in the ODI studio, the Status changes to Unknown, and the Last Changed time is updated to the time of deletion.
  - Active for Period status can only be assigned in ODI Studio. The Last changed time is updated and the status changes to Active when the user executes the Start command in the application.

ODI Mappings Grid

These ODI load plans are displayed in the ODI Mappings grid:

XBR_GEN_SETUP

ODI package that checks the status from the prior run, purges old log files, zips up the log files from the last run and purges old data files.

SUSPEND_WEBSERVICE

Suspends the XSTORE_XBRi webservice from loading data to the pos_staging table.

XBR_XSTART

Executes the sp_xstart stored procedure in the database.

XBR_GEN_GATHER

Gathers files from the landing area (INCOMING_FILES) and delivers them the appropriate TRANSFORMS/xxxxx/tmp directory. Additionally all data files are archived to OUTPUT_ARCHIVE.

XBR_GEN_SKUMST_LOAD, XBR_GEN_CUSTOMERMST_LOAD....

All master files follow the same process to map data to the _TMP version of the table in the database.

XBR_GEN_POS_STAGING

Maps a POS_STAGING.DAT file to the POS_STAGING table in the database.

XBR_GEN_API_LOAD

XBR_GEN_TLOGA_1, XBR_GEN_TLOGA_2, XBR_GEN_TLOGB_1

The package that handles the flow when transforming XML tlogs to a standard canonical format and ultimately loading to the POS_STAGING table in the database.

XBR_GEN_XFINISH_BATCH, XBR_GEN_XFINISH_REAL, XBR_GEN_XFINISH_EOD

Package that calls the corresponding sp_XFINISH stored procedure in the database.

RESUME_WEBSERVICE

Package that resumes the XSTORE-XBRi webservice load to pos_staging.

SETSTATUS

Procedure that sets the DTV/XBR/status to finished.

4

Customer Data Configuration

Administrator users have several tools available in the XBRi application for configuring a customer-specific deployment of the XBR^{i} core project. These are the procedures that should be followed to properly modify or extend a customer environment, although not all procedures may be applied in each case.

Managing Formulas Used in Statistics Tables

Administrator users can manage statistics formulas in the Statistics Formulas table in the Data Editor. This table corresponds to the PRO_VIEW_SYNTAX database table, which dictates the aggregation of data in records that are posted into the POS_STATISTICS_TAB database table.

Statistics records contain summary data for a particular store on a particular day. The statistics data is calculated and summed through a stored procedure. Statistics can be summed at several different levels depending on the key fields invoked. The four possible levels are:

- By Register
- By Cashier
- By Store (hierarchy, such as region, district, and so on)
- By Date

The table layouts for the POS_STATISTICS_TAB can be found in the *Oracle Retail XBRi Cloud Services Core Field Mapping Guide.*

To modify statistics records:

1. From the Tools menu, choose **Data Editor**.
2. Double click the hyperlink for **Statistics Formulas**, or click the **Available Actions**  icon in the Statistics Formulas row, and choose **Maintain**.

Each available statistics metric is displayed in a table with these columns:

ACTIVE_FLAG - This is set to N by default for core statistics metrics. You should set this flag to Y for core statistics metrics that will be used. If you want to make modifications, create a new metric based on the core metric and set this flag to h.

CUSTOM_FLAG - This is set to 0 by default for core statistics metrics. You should keep this flag set to 0 for Core statistics metrics. If you want to make modifications, create a new metric based on the core metric and set this flag to 1.

SYSTEM - This field is populated with STAT for all Loss Prevention aggregations that are associated with the POS_STATISTICS_TAB table. For Sales and Productivity aggregations, the field is populated with an abbreviation indicating the table with which the aggregations are associated. For example, SPOSLSPSN corresponds to the SPO_STATS_SLSPSN_TAB table. The POS_STATISTICS_TAB table is also used to formulate the aggregation of data for the Sales and Productivity tables.

SOURCE_FIELD - This field contains the formula for the source field, which will populate the TARGET_FIELD in the PRO_VIEW_SYNTAX table.

VIEW_NAME - The name of the field in the view that is used for generating the calculated value that is populated in the PRO_VIEW_SYNTAX table.

SYNTAX_ID – The system generated identity column. This field is not editable.

POSTING_SOURCE – This is set to ST by default and is not editable.

TARGET_FIELD - The target field in the PRO_VIEW_SYNTAX table.

END_OF_DAY_FLAG – Indicates statistics that are only calculated and generated during end of day processing. This is set to N by default.

3. In the Actions column of the statistics formula you want to modify, click the **Available Actions** icon and choose **Edit**.

   This displays the Statistics Formula - Edit Record page, with the following fields:

   SYSTEM - See definition above. This field is required.

   VIEW_NAME - This field is required.

   TARGET_FIELD - The target field in the PRO_VIEW_SYNTAX table.

   SOURCE_FIELD - This field contains the formula for the source field, which will populate the TARGET_FIELD in the PRO_VIEW_SYNTAX table.

   FROM_CLS - The From clause, if used.

   WHERE_ CLS - The Where clause, if used.

   GROUPBY_CLS - The Group By clause, if needed for the calculation of the statistics.

   ORDERBY_CLS - The Order By clause, if needed for the calculation of the statistics.

   POSTING_SOURCE - This field is set to ST by default and is not editable.

   ACTIVE_FLAG - This is set to N by default for core statistics metrics. You should set this flag to Y for core statistics metrics that will be used. If you want to make modifications, create a new metric based on the core metric and set this flag to N.

   CUSTOM_FLAG - This is set to 0 by default for core statistics metrics. You should keep this flag set to 0 for Core statistics metrics. If you want to make modifications, create a new metric based on the core metric and set this flag to 1.

   END_OF_DAY_FLAG – Indicates statistics that are only calculated and generated during end of day processing. This is set to N by default.

   COMMENTS - Enter any additional comments about the statistics metric for any configured statistic.

4. Enter the required changes, and click **Save** to save the changes.

   The LAST_UPDATE_DATE and LAST_UPDATE_ID are updated in the General Tab.

Modifying Core Statistics Metrics

You can add or update core statistics metrics in the Statistics Formulas table. You use the CUSTOM_FLAG column in conjunction with the ACTIVE_FLAG column to modify statistics.

To customize a core statistics metric:

1. From the Tools menu, choose **Data Editor**.

2. Double click the hyperlink for **Statistics Formulas**, or click the **Available Actions** icon in the Statistics Formulas row, and choose **Maintain**.

3. Locate the row of the core statistics metric that you are modifying, click the **Available Actions** icon and choose **Edit**. This displays the Edit Record page.

4. In the Edit Record page, set ACTIVE = y. Note the content of the fields. You will copy this into the new record and modify the information as needed.

5. Click **Add**. This displays a New Record page where you can enter the modified data for the new record. Set the CUSTOM_FLAG = 1 and the ACTIVE_FLAG = Y.
6. Copy the rest of the information from the statistic metric you are modifying, and modify the information as needed. Enter a VIEW_NAME that is different from the statistic metric you are modifying.
7. Click **Save** to save the record.

Sales and Productivity Statistics

The PRO_VIEW_SYNTAX table is also used to formulate the aggregation of data for the sales and productivity tables. You can modify S&P statistics metrics in the Data Editor – Statistics Formulas table. The SYSTEM field is populated with SPOXXXX. In the example below, SPOSTORE indicates the statistic is part of **SPO_STATS_STORE_TAB**

Example: **SALE_EXTENDED_AMOUNT** statistics metric as defined in PRO_VIEW_SYNTAX

Field_Name	Value
SYSTEM	SPOSTORE
POSTING_SOURCE	ST
TARGET_FIELD	SALE_EXTENDED_AMOUNT
SOURCE_FIELD	SUM(extended_amount)
VIEW_NAME	SALE_EXTENDED_AMOUNT
FROM_CLS	POS_STAGING
WHERE_CLS	STATUS IN ('OK', 'AO', 'AR') AND TRANSSTAT = 'COMPLETE' AND (RECTYPE = 'SKU' OR (RECTYPE IN ('LAYSKU','SOSKU') AND ATTRIBUTE_CODE1 IN (9,10,11)) OR (RECTYPE = 'NM' AND RECCODE = '02') OR (RECTYPE IN ('LAYNM','SONM') AND RECCODE = '02' AND ATTRIBUTE_CODE1 IN (9,10,11))) AND TRANSTYPE IN ('SALE','EXCHANGE') AND TRAINING_FLAG = 'N' AND VOID_CODE < 3 AND RETURN_FLAG = 'N'
GROUPBY_CLS	BUSINESS_DATE, STORENUM, DIVISION, BATCHNO, ORGID, CURRENCY_CODE
ORDERBY_CLS	
COMMENTS	
ACTIVE_FLAG	N
CUSTOM_FLAG	0
END_OF_DAY_FLAG	N

Sales and Productivity Tables

The Sales and Productivity (SP) module is divided into the following four business areas:

Comparative Sales

The purpose of the Comparative Store Sales category is to report on sales by store by day. These sales include This Year vs. Last Year (TY/LY) transformation metrics, based on retailers' predefined fiscal calendars. A second set of transformation metrics track comparative (Comp), or same store sales. These metrics add further logic to the TY/LY comparison, by comparing store sales only to when the store was

open at the same time this year and last; with additional business logic. The Comp settings are maintained within the application using a new Store Status page in Administration, Project Defaults. In addition, the customer can define and load sales goals or budgets to compare a store's sales performance to as many as three different sales goals. This is accomplished within the application, using a new Upload Goals/Sales page in Administration, Project Defaults. The goal file can also be loaded from a customer-provided file feed.

Salesperson/Employee Productivity

Salesperson Productivity reporting tracks key sales and productivity KPI's. These KPI's are attuned to a true selling environment in which employees are held accountable for sales and the quality and focus of what they sell. Another component of salesperson productivity is measuring sales against hours worked. Hours worked can be classified as selling or non-selling hours. These metrics are used to create and monitor sales/labor hour comparatives. A comprehensive set of new reports is provided in the Productivity category, as well as a new Salesperson Productivity dashboard. Using the new Salesperson Custom Stats page in Administration, Project Defaults, users can identify up to 10 custom count, transaction count, and amount statistics to use in reporting.

Merchandise Productivity

Merchandise Productivity provides retailers with sales analysis across their merchandising hierarchy. A merchandise (SKU Master) table has been incorporated, which provides the levels of summarization needed within these hierarchies along with added attributes associated with the item such as vendor or manufacturer. This allows retailers to analyze their merchandise sales by categories and by items across their merchandise and operational hierarchies. It also allows for Margin analysis as well as, Return, Discount, and Voids summary information through these same hierarchies.

Store Sales Flow by Period

The Store Flow by Period components of this module provide customers with added business analytics focusing on the flow of sales transactions throughout business days, by hour, or by day part custom categorizations as well as by traffic counts and conversion rates.

The tables that contain the aggregated data are:

SPO_STATS_PERIOD_TAB	Contains aggregated data by Day, Store, Fixed Period
SPO_STATS_SKU_TAB	Contains aggregated data by Day, Store, Item
SPO_STATS_SLSPSN_TAB	Contains aggregated data by Day, Store, Salesperson
SPO_STATS_STORE_TAB	Contains aggregated data by Day, Store

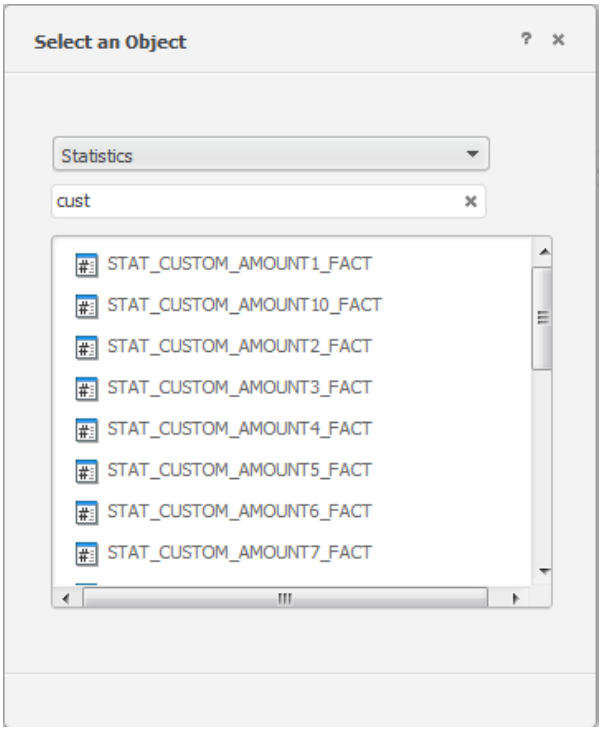
Using Custom Fields in the Metric Editor

There are several different types of custom fields available in the Metric Editor that you can use in creating metrics that extend the XBRi core data. These fields are described in the sections that follow. For more information on creating metrics in XBRi, see the *Oracle Retail XBR^{i} Cloud Services Web User Guide* or use the context sensitive help in the Metric Editor. The Metric Editor is accessed using the Create Metric icon in the tool bar in the Shared Reports or My Reports folders.

Create Metric Icon

Using Custom Amount and Count Fields

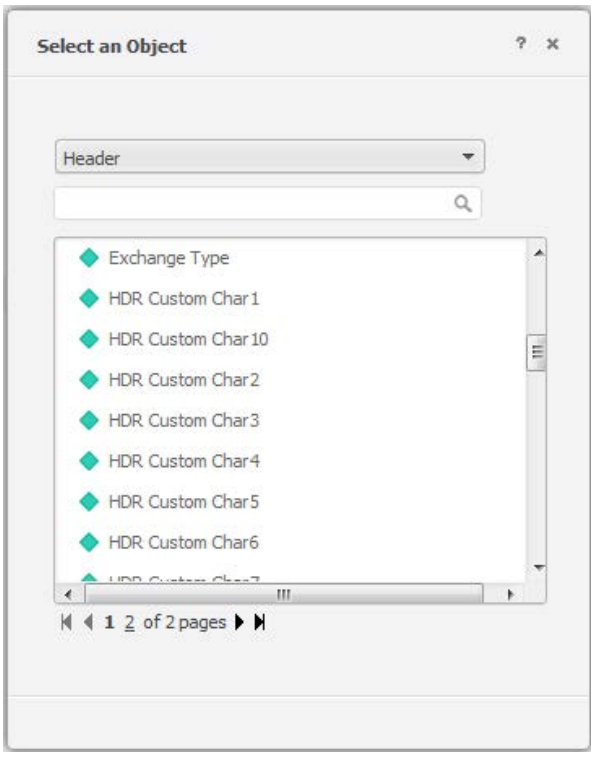
There are 20 custom statistic fields available in the Metric Editor for aggregating different subsets of data by count and amount. They are typically combined in pairs of one Count and one Amount to create a new custom fact. In order to use the new custom fact, you must create a new metric for it. To display the custom amount and count fields in the Metric Editor, navigate to the Schema Objects/Facts/Loss Prevention or Sales and Productivity/Statistics folder, and enter CUST in the search field.



Custom Statistics in Metric Editor

Using Custom Header Attributes and Facts

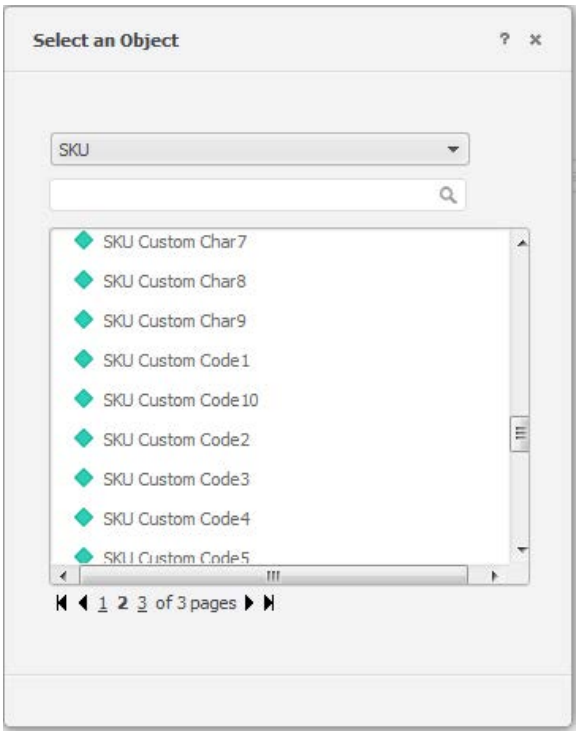
Custom Header attributes and facts are available for creating metrics in the Metric Editor. To display the custom header fields in the Metric Editor, navigate to the Schema Objects/Attributes/Loss Prevention or Sales and Productivity/Header folder.



Custom Headers in Metric Editor

Using Custom Detail Attributes and Facts

Custom Detail attributes and facts are available for creating metrics in the Metric Editor. To display the custom header fields in the Metric Editor, navigate to the Schema Objects/Attributes/Loss Prevention or Sales and Productivity/Header/(detail name, such as SKU) folder.



Custom Details in Metric Editor

The following custom core detail attributes and facts are provided:

(LDS, OTH, SKU,TAX,TDS, TND or PTC) CUSTOM CHAR *n(1-10)* – Use these for any attribute that does not require a lookup.

(LDS, OTH, SKU,TAX,TDS, TND or PTC) CUSTOM CODE *n(1-10)* – Use these for any attribute that has a lookup. (used in new installs only)

(LDS, OTH, SKU,TAX,TDS, TND or PTC) CUSTOM FLAG *n(1-10)* – Use these for any flag attributes with a N or Y value. (used in new installs only)

(LDS, OTH, SKU,TAX,TDS, TND or PTC) CUSTOM DATE *n(1-3)* – Use these for any custom date attribute.

(LDS, OTH, SKU,TAX,TDS, TND or PTC) CUSTOM NUM n(1-10) FACT - Use these only if the fact applies to only one POS_* table

Custom Option to Manage or Activate the Ordering of Stored Procedures

The option to change the order of stored procedure processing for XStart, Batch, Real Time and End of Day has been added to a new table in the Data Editor called ETL Stored Procedure Ordering. Administrator users can select the Maintain action for ETL Stored Procedure Order, and modify the sequential order of the ETL Stored Procedures processed during ETL runs, as well as manage activation of the procedures. The Stored Procedure Ordering table will only be activated when the active flag is set for Y for the following custom settings: CUSTOM_ETL_XFINISH_EOD, CUSTOM_ETL_XFINISH_BATCH, CUSTOM_ETL_XFINISH_REAL. These settings are available in the Data Editor System Variables Settings table.

Custom Language Translation

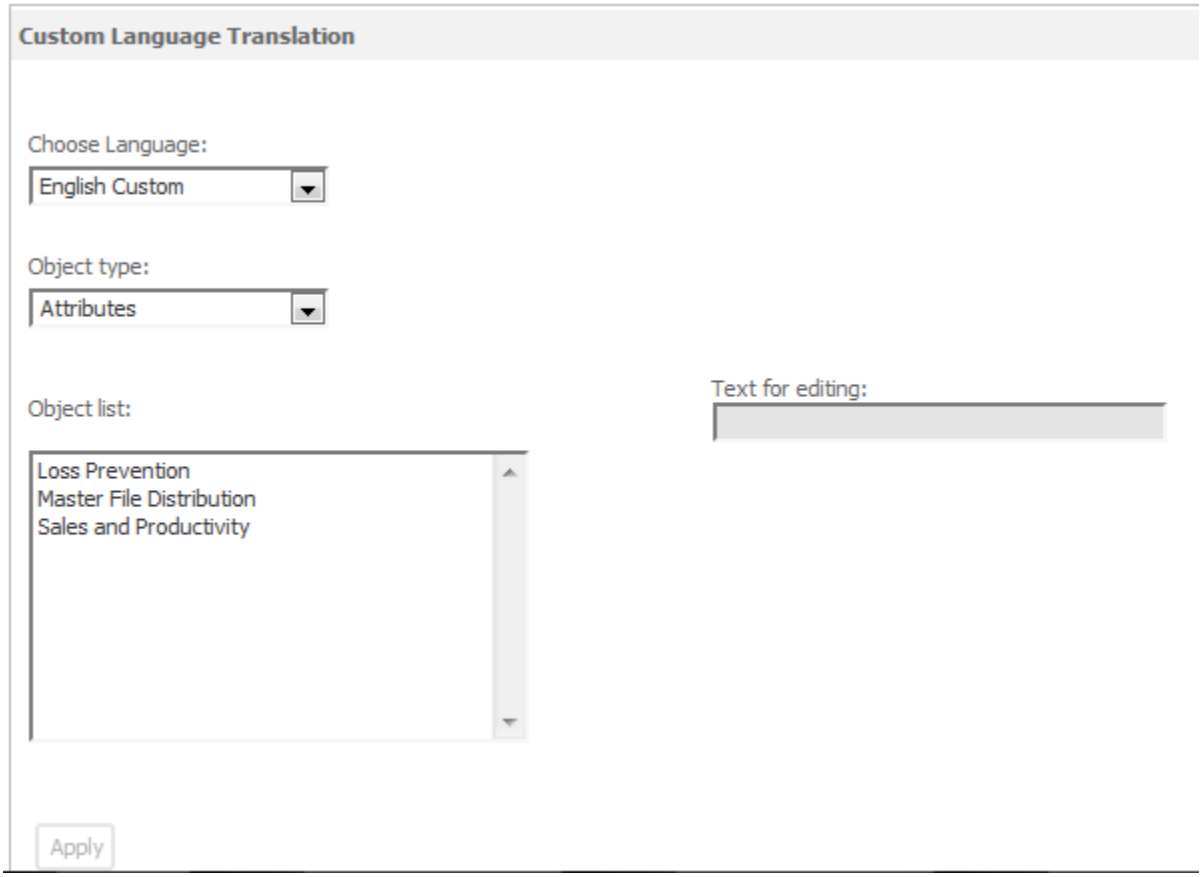
From the Project Defaults menu items, the Custom Language Translation option is provided for field labels used in attributes, metrics, filters, and prompts. Customer Administrators can select the custom language, object type, and object to be customized, and enter a more meaningful custom label for the

object in the provided field. The modified field labels are only applied at the metadata level and can only be seen if the Language metadata option in their user preferences is also set to the preferred custom language, for example, English Custom instead of English. Once a label is updated with a new custom entry, then they should see the new label in reports, metrics, filters or prompts.

> **Notes**: Custom languages supported are: German, French, Italian, Portuguese, Spanish and English. Customers must make a service request to Oracle for the initial creation of custom languages.
>
> There are some areas in which a custom translation cannot be applied, such as dashboards and attribute forms.

To translate a custom data object:

1. From the Admin menu, choose Project Defaults.
2. Click the Custom Language Translation link.



Project Defaults - Custom Language Translation

3. From the Choose Language drop-down menu, choose the Custom language you want to use. Available languages are:
   - English Custom
   - German Custom
   - Italian Custom
   - French Custom
   - Spanish Custom

– Portuguese Custom

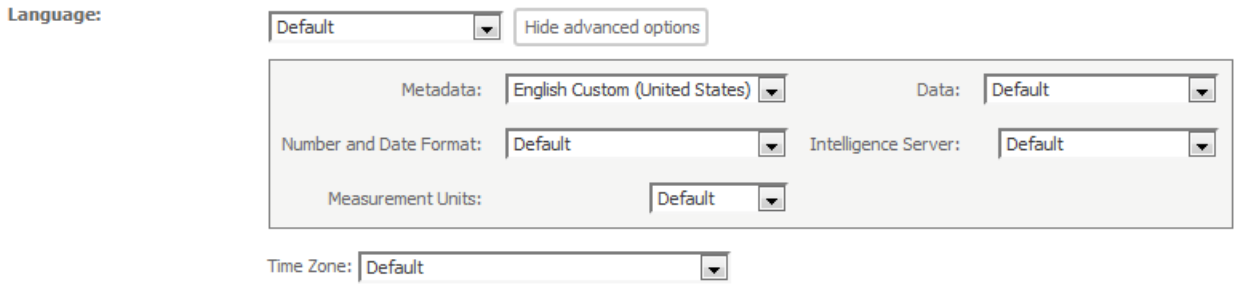
4. From the Object Type drop-down list, choose from among the following object types:
   – Attributes
   – Metrics
   – Filters
   – Prompts

   This displays a list of categories in the Object list for that object type.
5. Double click on a category to display subcategories, and continue double-clicking on categories until you reach the list of objects containing the one you want to translate.
6. Select the object you want to customize. This displays the object in the **Text for editing** field.
7. Enter the custom name for the object and click **Apply**. This displays an Update Confirmation message: "Custom translation has been updated"

   Repeat steps 4-7 for each custom data object that you want to translate.

To select the custom language in User Preferences:

1. From the Admin menu, choose User Preferences.
2. In the Language area of the General tab, click **Show advanced options.**



Show Advanced Language Options

3. From the Metadata drop-down list, select the Custom language that was used to translate the custom objects.
4. Click **Apply** at the bottom of the General tab.

   This ensures that the translated label for the custom object is displayed at the metadata level where invoked in the application.

Activating and Changing the Order of Stored Procedures

Administrator users can modify the sequential order of ETL stored procedures processed during ETL runs and manage activation of the procedures. The Stored Procedure Ordering table will only be activated when the active flag is set for Y for the following custom settings: CUSTOM_ETL_XFINISH_EOD, CUSTOM_ETL_XFINISH_BATCH, CUSTOM_ETL_XFINISH_REAL in the pro_sp_variables database table (or System Variable Settings in Data Editor).

To activate stored procedures:

1. From the **Tools** menu, choose **Data Editor**.
2. Click the hyperlink for **ETL Stored Procedure Order**.
3. In the Actions column, click the **Available Actions** icon and choose **Maintain**.

4. This displays a list of ETL processes and their stored procedures, in sequential order, as well as an Active flag indicating whether the procedure is active (Y/N) for each stored procedure.
5. In the row of any of the stored procedures that you want to activate, click the Available Actions icon  and choose **Edit**.
6. Set the Active Flag field to Y.

To change the order of stored procedures:

1. In the row of the stored procedure whose sequence order you want to change, click the Available Actions icon  and choose **Edit**.
2. In the Sequential Order field, enter the number indicating the order in which you want the stored procedure to run.
3. Repeat steps 1 and 2 for each stored procedure in the process, to indicate the order in which you want them to run.

Update System Variable Settings

Many of the database stored procedures use the variables in the PRO_SP_VARIABLES table to determine how to load the data. It is important to set the variables correctly so the data in the database loads properly. Administrator users can use the Data Editor – System Variable Settings table to manage these settings. An overview of the database variables is provided in the following sections.

> **Note:** Remember to set the variable for both VAR_VALUE and VAR_VALUE2
>
> **Note**: Check and set all database variables in the Data Editor – System Variable Settings table according to the installation questionnaire spreadsheet that should have been already completed.

To modify a system variable setting:

1. From the Tools menu, choose Data Editor.
2. In the Data Editor, double click on the row for System Variable Settings.
3. In the row of the variable that you want to modify, click the **Available Actions**  icon, and choose **Edit** 
4. This displays an Edit Record page, where you can edit the variable values.

Refer to the information in the following sections for definitions of system variables and guidelines on entering values.

The System Variable Setting table has two columns

System – The system to which the variable belongs.

Variable – The database field name of the variable.

Store and Cashier/Employee/Salesperson variables:

- STORE_UNIQUE - determines if store numbers are unique across the organization.
- CASHIER_UNIQUE – determines if cashier numbers are unique across the organization.
- EMPLOYEE_COPY - determines if cashier number is copied to employee number.
- SALESPERSON_COPY - determines if cashier number is copied to salesperson number.

- EMPNUM_USED - determines if employee number is used or always NULL.
- SALESPERSONNUM_USED - determines if salesperson number is used or always NULL.
- CASHIER_SIZE - determines the maximum size of CASHIERNUM, EMPNUM, and SALESPERSONNUM

SKU and Customer variables:

- SKU_STAGE_OVERRIDE - determines if the SKU data from staging should override SKU temp.
- CUST_STAGE_OVERRIDE - determines if the customer data from staging should override Customer temp.

General LP Variables:

- PROCESSING_TYPE – determines the type of processing, either batch or real time.
- FN_PRO_VOID_SCHEME – indicates which void scheme the customer uses.
- CAPTURE_PV_DETAILS – Indicates if the tlog captures the Post void details.
- POSTVOID_PROCESSING – Determines if the database or ETL handles the post void processing.
- FB_NOSALE – Determines if the database or ETL handles the Followed by No Sale processing.

No Match Processing Variables:

- PROCESS_NM_RETURNEXCH – determines if we run the procedure that populates the return and exchange no match data.
- PROCESS_NM_PVCANCEL - determines if we run the procedure that populates the post void and cancel no match data.
- CAPTURE_ORIG_REGNUM – indicates if the tlog captures the original register number on returns.
- PV_MINS – indicates the number of minutes to look forward for post void no match processing.
- CANCEL_MINS – indicates the number of minutes to look forward for cancel no match processing.

Configuring Store & Cashier/Employee/Salesperson variables- Unique, Used, Size

Store Unique in Chain

These variables are indicated in the POS Questionnaire. Confirm them from the content of the tlog and Store Master.

CASHIER_STORE.STORE_UNIQUE.VAR_VALUE & VAR_VALUE2

- If Store Number is unique in Chain, set to Y.
- If Store Number is not unique in Chain, set to N.
- If Store Number is not unique in Chain and is unique within division, set to N.

Cashier Unique in Chain (does not matter if cashiers float between stores)

These variables are indicated in the POS Questionnaire. Confirm them from the content of the tlog and Employee Master

CASHIER_STORE.CASHIER_UNIQUE.VAR_VALUE & VAR_VALUE2

- If Cashier Number is unique in Store but not unique in Chain, set to N.
- If Cashier Number is unique in chain, set to Y.

Employee Copy from Cashier

These variables are indicated in the POS Questionnaire. Confirm them from the content of the Employee Master.

Employee number refers to the identification of the employee that is posted to the tlog on transactions where the employee is the customer, not the employee number from the customer's HR system.

CASHIER_STORE.EMPLOYEE_COPY.VAR_VALUE & VAR_VALUE2

- If employee numbers on employee sales can be different from cashier numbers, set to N.
- When a record is added to the employee master as a 'NOF' (Not on File) from the tlog and the cashier number should be copied to the employee number field in the NOF, set to 'Y'.
- Info - This flag controls if EMPLOYEENUM and EMPLOYEEID are populated with the Cashiernum and CashierID respectively or left NULL by the Not On File procedure.

Salesperson Copy from Cashier

These variables are indicated in the POS Questionnaire. Confirm them from the content of the Employee Master.

CASHIER_STORE.SALESPERSON_COPY.VAR_VALUE & VAR_VALUE2

- If salesperson numbers can be different from cashier numbers, set to N.
- If salesperson numbers are not used at all, set to N.
- If the cashier number should be copied to the salesperson number when a record is added to the employee master as a 'NOF' (Not on File) from the tlog, set to Y.
- If the salesperson field in the tlog would be populated with the same number as the cashier number of the employee, then set to Y.
- Info - This flag controls if SALESPERSONNUM and SALESPERSONID are populated with the Cashiernum and CashierID respectively or left NULL by the NOF procedure.

Employee Number Used in Tlog

This variable is indicated in the POS Questionnaire. Confirm them from the content of the tlog and Employee Master.

This is true when an employee is the customer for a transaction and their employee number is captured and posted in the tlog

CASHIER_STORE.EMPNUM_USED.VAR_VALUE & VAR_VALUE2

- If employee number field in the tlog is not null for employee sales and returns, set to 'Y'.
- If employee number field is null in the tlog for employee sales & returns, set to 'N'.
- Info – the employee number in the employee master is expected to match the number in the employee number field in the tlog for employee sales and returns.

Salesperson Number Used in Tlog

This variable is indicated in the POS Questionnaire. Confirm them from the content of the tlog and Employee Master

CASHIER_STORE.SALESPERSONNUM_USED.VAR_VALUE & VAR_VALUE2

- If salesperson number can be populated in the tlog for sales and returns, set to Y.
- If salesperson number is not in the tlog for sales & returns, set to N.

Cashier Size

This variable is indicated in the POS Questionnaire. Confirm them from the content of the Employee Master

CASHIER_STORE.CASHIER_SIZE.VAR_VALUE & VAR_VALUE2

Determines the maximum size of the customers column which will be the source for CASHIERNUM, EMPNUM, SALESPERSONNUM – this value is used in the calculation of the CASHIERID, EMPLOYEEID and SALESPERSONID column values.

- The max size allowable is 20 for CASHIERNUM, EMPNUM, SALESPERSONNUM and will control the sizing of all three of the ID columns.
- The default is 10. If the length of the cashier number in tlog and Employee Master are shorter than or equal to the default, use the default.
- If the cashier number is longer than the default, change cashier_size to that length.

Configuring SKU and Customer Master Variables

SKU Stage Override

This variable determines if the SKU master update procedure will overwrite the values in the SKU master table with values from the staging table.

MASTERUPDATE.SKU_STAGE_OVERRIDE.VAR_VALUE & VAR_VALUE2

- If you want the SKU master data to be overwritten by the pos_staging SKU data then set this to Y.
- If you don't want the SKU master data overwritten then set this to N.

Customer Stage Override

This variable determines if the customer master update procedure will overwrite the values in the customer master table with values from the staging table.

MASTERUPDATE.CUST_STAGE_OVERRIDE.VAR_VALUE & VAR_VALUE2

- If you want the customer master data to be overwritten by the pos_staging customer data then set this to 'Y.'
- If you do not want the customer master data overwritten then set this to 'N.'

Configuring General Module variables

Processing Type

This variable determines the type of processing; either batch, where the ETL is run once per day, or real time, where the ETL is run every 15 minutes during the day and one end of day procedure at the end of the day.

XBRI.PROCESSING_TYPE.VAR_VALUE & VAR_VALUE2

- For batch processing set this to BATCH.
- For real time processing set this to REAL.

Capture Post Void Details in Tlog

This variable is indicated in the POS Questionnaire. Confirm them from the content of the tlog.

If post void details are not captured on the post void transaction a database stored procedure will create the detail lines by looking at the original transaction.

PROACT.CAPTURE_PV_DETAILS.VAR_VALUE & VAR_VALUE2

- If Post Void transactions have the detail lines from the voided transaction, set to Y.
- If Post Void transactions do not have details, set to N.

Post Void Processing

This variable determines whether the database or ETL handles the post void processing.

This is for the transaction status and post void time difference columns at header level. If the database handles the processing it will mark the original transaction with transstat = 'POSTVOID' and calculate the time difference. In a real time processing environment this should be set to Y'

PRO_SP_VARIABLES.XBRI. POSTVOID_PROCESSING.VAR_VALUE & VAR_VALUE2

- If the database procedure handles the post void processing set to Y.
- If the ETL handles the post void processing, set to N.

Void Scheme

This variable is indicated in the POS questionnaire. Confirm from the content of the customer's tlog.

The Void Scheme variable should be updated based on the how the customer's Tlog or web services pass the data for line item records that were voided. Because XBRi attempts to balance the quantity and amount field while still displaying the line void occurrences, two records are captured and generated for each line void. The value of the VOID_CODE field is set with "0" for not voided, "1" for voided line and "2" for voiding line.

The Void Scheme variable is available for the load process to determine based on whether the Tlog or web services send XBRi both records or only one record. If only one record, the offsetting (opposite value) record will be generated and loaded.

Options are:

- Set value to 1 for where both the Voiding and Voided lines are included
- Set value to 2 for where only one voiding line is included

VOID_SCHEME.FN_PRO_VOID_SCHEME.VAR_VALUE & VAR_VALUE2

Followed by No Sale

This variable determines whether the database or ETL handles the Followed by No Sale processing. This is for the followed by no sale flag column at header level. If the database handles the processing it will mark the transaction prior to a NOSALE with fbnosale_flag = Y. In a real time processing environment this should be set to Y.

XBRI. FB_NOSALE.VAR_VALUE & VAR_VALUE2

- If the database procedure handles the followed by no sale processing set to Y.
- If the ETL handles the followed by no sale processing, set to N.

Process No Match Return Exchange

The No Match process is performed using the SP_PRO_NOMATCH_RETURNEXCH procedure, which is run from within the SP_PRO_LOAD_HIST procedure. This procedure looks for original purchase transactions related to refunds and exchanges. Based on the results of these lookups, Match Codes are assigned.

NOMATCH.PROCESS_NM_RETURNEXCH.VAR_VALUE and VAR_VALUE2

- If original transaction STORE, TRANSNUM, REGNUM & DATE for returns are in tlog, then set to Y, else N.

> **Note:** If a customer has more than one POS, and one POS captures original transaction information for returns and the other POS does not, discuss this with the project manager. If Return No Match is enabled, the system will report a lot of false positives for the POS that does not capture original transaction information.

Process No Match Post Void & Cancelled

The No Match process is performed using the SP_PRO_NOMATCH_PVCANCEL procedure, which is run from within the SP_PRO_LOAD_HIST procedure. These procedures look for subsequent re-ring transactions related to post voids and cancels. Based on the results of these lookups, Match Codes are assigned.

NOMATCH.PROCESS_NM_PVCANCEL.VAR_VALUE and VAR_VALUE2

- If the tlog has Post Voids and/or Cancels, set to Y, else N.

Capture Original Regnum on Returns

This variable is indicated in the POS Questionnaire. Confirm them from the content of the tlog.

NOMATCH.CAPTURE_ORIG_REGNUM.VAR_VALUE and VAR_VALUE2

- If the tlog captures the original register number for returns, set to Y, else N.

> **Note:** if this were a real time environment there would be two places to modify the view.

Post Void Minutes

The number of minutes to look forward to see if a SKU in a post-voided transaction was re-rung.

NOMATCH.PV_MINS

- Core default is 15.

Cancel Minutes

The number of minutes to look forward to see if a SKU in a cancelled transaction was re-rung.

NOMATCH.CANCEL_MINS

- Core default is 15.

Configuring Data Purge Process Variables

To enhance data minimization for personal data, a purge process is configurable for the deletion of inactive Customer, Employee and Store personal data. The application will delete data considered to be personal data in the database, such as customer and ship to names, addresses, email addresses, etc. The purge routine is added to SP_ETL_XFINISH_BATCH and real time end of day SP_ETL_XFINISH_EOD procedures. Settings in the System Variable Settings table enable this to be turned on when the active flag is set to Y and reaches the number of days defined. By default, the active flag is set to Y, and the default number of days setting is 370 days for each:

CUSTOMER_INACTIVE_DAYS - based on number of days since the transaction date that is associated with a customer number. Customer First / Last Name, Shipping Address, Email Address, Shipping First / Last Name, Phone Number, Zip code, State, Country will be deleted from transaction history.

EMPLOYEE_TERMINATED_DAYS - based on number of days since the termination date set in the employee master file. Employee first name, last name, federal ID, employee image, and salesperson image data will be deleted from the employee master file.

STORE_CLOSED_DAYS - based on number of days since the closed date in the store master file. Manager name and email address will be deleted from the store master file.

Flagging Data Requestors as Active or Inactive

The Data Requestor corresponds to the pro_requestor table, which is used by the pro_clear_stage procedure to determine if a particular batch can be cleared. The pro_batch_control table has four columns for each record in the pro_requestor table. The pro_clear_stage procedure looks at the error code field in pro_batch_control to confirm all critical processes have successfully completed before clearing the batch. You use the Data Requestor table in the Data Editor to indicate which data requestors are being used.

To indicate the status of a data requestor:

1. From the **Tools** menu, choose **Data Editor**.
1. In the row for Data Requestor, click the **Actions** icon and choose **Maintain**.
2. In the Actions column of the data requestor you want to edit, click the **Available Actions** icon and choose **Edit**. This displays the Data Requestor - Edit Record page for the selected data requestor. The DATA_REQUESTOR_NAME and REQUESTOR_ID fields are not editable.
3. In the ACTIVE_FLAG field, enter **Y**, to indicate that the data requestor is being used, or **N** to indicate that it is not being used.
4. Click **Save** to save the changes.

Configuring Max Threads and Exceptions for Controls

Control Points are reports that track information on activity performed by a store, cashier, and so on, based on a defined threshold. An example of this would be a cashier who repeatedly exceeds the threshold amount for line discounts. When you run a control point report, it will create results if the values exceed the threshold value defined in the report. Those results are called Exceptions. Administrator users can set the number of control point reports that can run simultaneously, and the number of exceptions that can be generated by a control point report before a prompt is displayed asking if the user wants to see more exceptions.

1. From the Tools menu, choose Data Editor.
2. In the Data Editor, double click on the row for LP Variables.
3. In the row of the variable that you want to modify, click the **Available Actions** icon, and choose **Edit**. This displays an Edit Record page where you can edit the variable values.
   - For the VAR_NAME, CONTROL_MAX_THREADS enter the VAR_VALUE. This is the number of control point reports that can be run simultaneously.
   - For the VAR_NAME, CONTROL_MAX_EXCEPTIONS, enter the VAR_VALUE. This is the number of exceptions that can be generated for a control point before an error message is displayed.

Managing Tender Categories and Custom Tender Types

Administrator users can modify and add credit tender categories in the Tender Category Master table and add and modify credit tender types in the Tender Type Master table using the Data Editor.

> **Note:** Tender Categories (such as Cash, Check, Credit Card) are classifications that are used to group Tender Types. For example, the Tender Category, Credit Card could contain the Tender Types, Visa, MasterCard, and AMEX.

Tender Category Master

To modify credit card tender categories:

1. From the **Tools** menu, choose **Data Editor**.
2. Double click the hyperlink for Tender Category Master. Select the Credit Card tender category or click the **Available Actions** icon and choose **Maintain.**
3. In the Actions column for the Credit Card tender type, click the **Available Actions** icon and choose **Edit**.

   This displays the Tender Category Master - Edit Record page.
4. You can change the name of the credit card tender category in the TENDER_CATEGORY_DESC field. If you modify this field, The LAST_UPDATE_DATE and LAST_UPDATE_ID are updated in the General Tab. The Tender_Category number is not editable.

To localize credit card tender category descriptions:

1. Click the Translations tab.
2. In the TENDER_CATEGORY_DESC field for a language (for example, TENDER_CATEGORY_DESC_DEDE)* enter the name of the credit card tender category in that language. **Note:** You may need to maximize the window to see the language code.

To add a Tender Category:

1. Click the **Add** icon in the Tender Category Master toolbar.
2. In the TENDER_CATEGORY field, enter a unique number, for example, 012. You can enter up to ten numeric characters.
3. In the TENDER_CATEGORY_DESC field, enter a unique description for the category of up to 2,000 characters, for example, Store Credit Cards
4. Click the Save icon.
5. This saves the new tender category and updates the LAST_UPDATE_DATE and LAST_UPDATE_ID fields.

Tender Type Master

Administrator users can modify and add credit card tender types and assign them to tender categories in the Tender Type Master table in the Data Editor.

To modify tender types:

1. From the **Tools** menu, choose **Data Editor**.
2. Double click the hyperlink for Tender Type Master or click the **Available Actions** icon and choose **Maintain.**
3. In the Actions column of the tender type you want to modify, click the **Available Actions** icon and choose **Edit**.

   This displays the Tender Type Master - Edit Record page, with the following fields:

   TENDER_TYPE_DESC - You can change the name of the tender type in this field. If you modify this field, The LAST_UPDATE_DATE and LAST_UPDATE_ID are updated in the General Tab.

   TENDER_TYPE - The TENDER_TYPE number is not editable.

TENDER_CATEGORY - You can enter the number of a valid tender category in this field to assign the tender type to that category. If you modify this field, The LAST_UPDATE_DATE and LAST_UPDATE_ID are updated in the General Tab.

To localize tender type descriptions:

1. Click the Translations tab.
2. In the TENDER_TYPE_DESC field for a language (for example, TENDER_TYPE_DESC_DEDE)* enter the name of the tender type in that language. **Note:** You may need to maximize the window to see the language code.

*In this example, DEDE is derived from the ISO code for German (Germany), de-DE)

Configuring Data Science Parameters

System Administrators can modify pre-defined data science configuration settings using the Data Editor Science Parameters page.

To modify Data Science parameters:

1. From the **Tools** menu, choose **Data Editor**.
2. In the row for Science Parameters, click the **Actions** icon  and choose **Maintain**.
3. In the Actions column of the data science parameter you want to edit, click the **Available Actions** icon  and choose  **Edit**. This displays the Science Parameters - Edit Record page for the selected parameter. The PARM_KEY, PARM_NAME, CURRENCY_CODE, PARM_FUNCTION, PARM_DATATYPE, and PARM_SECURITY fields are not editable.
4. In the PARM_VALUE field, you can enter a new value for the parameter, for example, for the TENDER_COUNT parameter, enter the number of manually keyed employee account numbers you want in the threshold. When you click in this field, a tip for how to format the value is displayed.
5. The Comments field contains a description of the parameter. You can change this description if you want.
6. Click **Save** to save the changes.

In addition to the Data Science Parameters table, The Date Editor also has the following Data Science Tables. Detailed information about each of these tables will be provided soon:

Science Batch-Training Dates Controls – Provides access to updating the batch date range and the number of days in which the science Model training is done. It is only necessary to configure this once. The application will automatically add the next batches through the scheduler.

Science Model Settings – Provides access to updating the Science Model Setting that controls the executions of the models and define the model algorithm used. This is only to be used by the Oracle Science team, when needed.

Science Models – Provides access to updating the model views for the WID and Hints for the Science module.

Science Risk Type Categories – Provides access to update Risk Types Categories to allow the user to group the Risk Targets by category, for example, refunds, voids, and discounts.

Science Risk Type Definitions – Provides access to update Risk Types and Hints to allow the user to update the descriptions. The core data will provide predefined descriptions for all known risks.

For detailed information on how to configure all available data science parameters, see the *XBRi Data Science Configuration Guide*

Extending ODI Configuration

The ODI Configuration option on the Tools menu lets Administrator users associate extended configuration data with a particular profile. Launching this option displays an ODI Configuration/Repository Updates page that lists the import configurations for each profile code. Using Download and Replace commands, you can download a configuration from the server, and replace it with a modified configuration. The Clear command is available for clearing a configuration on the server. Repository configurations are listed by Profile Code and Category. You can display all categories or a single category. Choosing Download displays a prompt that lets you save the config file or open it with an XML editing tool.

The application comes with the profile code and categories listed below. Additional profile codes can be created in the new ETL engine:

Profile Codes

XbrLoader POSLOG

Categories

Child Schema

Parent Schema

TLOGA_1 XSD

TLOGA_1 XSL

TLOGA_2 XSD

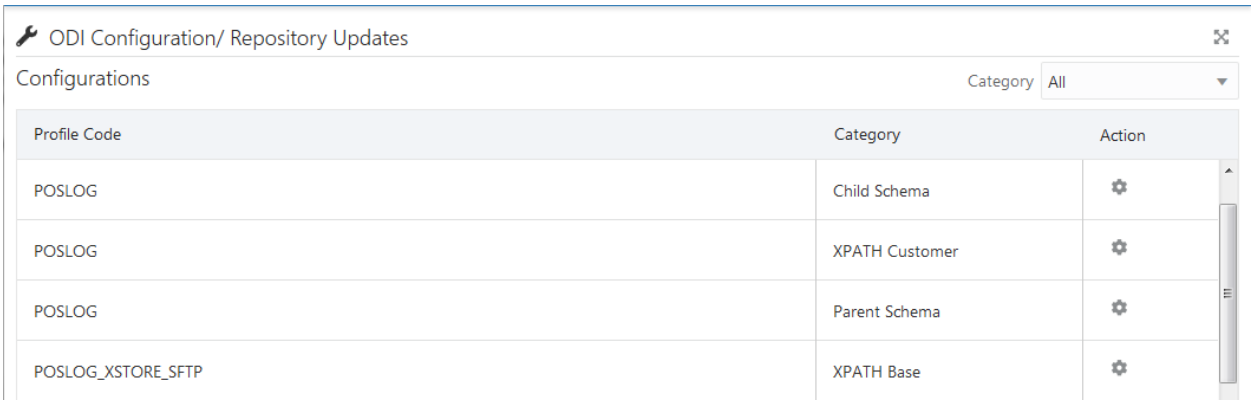
TLOGA_2 XSL

XPATH Base

XPATH Customer

To download a configuration:

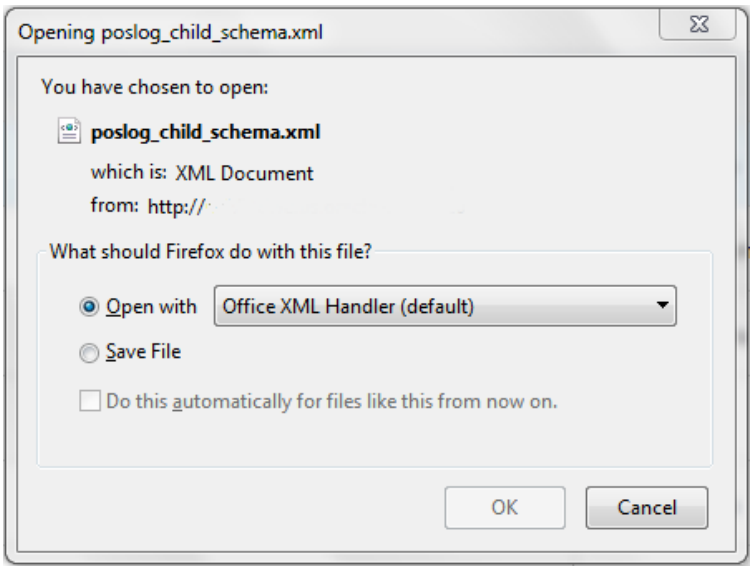
1. From the Tools menu, choose ODI Configuration. This displays the ODI Configuration/ Repository Updates screen:



ODI Configuration/ Repository Updates screen

   The Category display list is set to All. If you only want to display configurations for one category, choose the category you want displayed from the drop-down list.

2. In the row of the configuration that you want to download, click the **Action** icon , and choose **Download** from the drop-down list. This displays a dialog with options for opening or saving the configuration:



Opening ODI configuration dialog

3. Chose to either open or save the file. The options are:

   Open with – Select the radio button and choose an application for opening the file from the drop-down list. Select Other… to browse for an application that is not on the list. When you click OK, the file is downloaded and opened in the selected application.

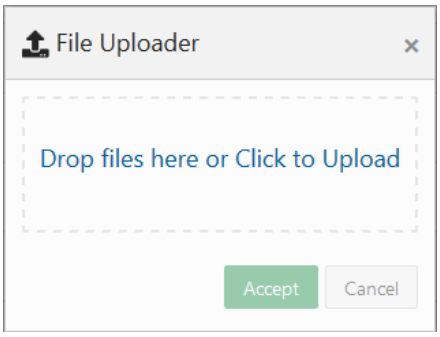
   Save file – Select the radio button. When you click **OK**, a browser is displayed for selecting a location for saving the downloaded file.

   Do this automatically for files like this from now on – Select the checkbox if you want to bypass this dialog and go directly to the next step for the selected download option.

   Or, click **Cancel** to cancel out of the dialog without downloading the file.

To replace a configuration:

1. In the row of the configuration that you want to replace, click the **Action** icon , and choose **Replace** from the drop-down list. This displays a File Uploader:



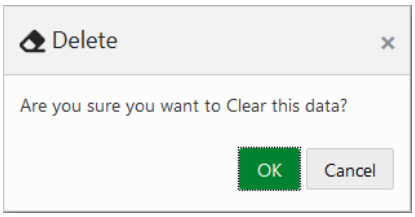
File Uploader

2. Drag and drop the updated file into the File Uploader, or click to browse for the file.
3. Click **Accept** to upload the file and replace the configuration on the server.

   Or, click **Cancel** to close the File Uploader without replacing the file.

To clear a configuration:

1. In the row of the configuration that you want to clear, the **Action** icon , and choose **Clear** from the drop-down list. This displays a Delete confirmation message:



Delete Confirmation

2. Click **OK** to clear the configuration data on the server.
   Or, click **Cancel** to close the message without clearing the data.

5

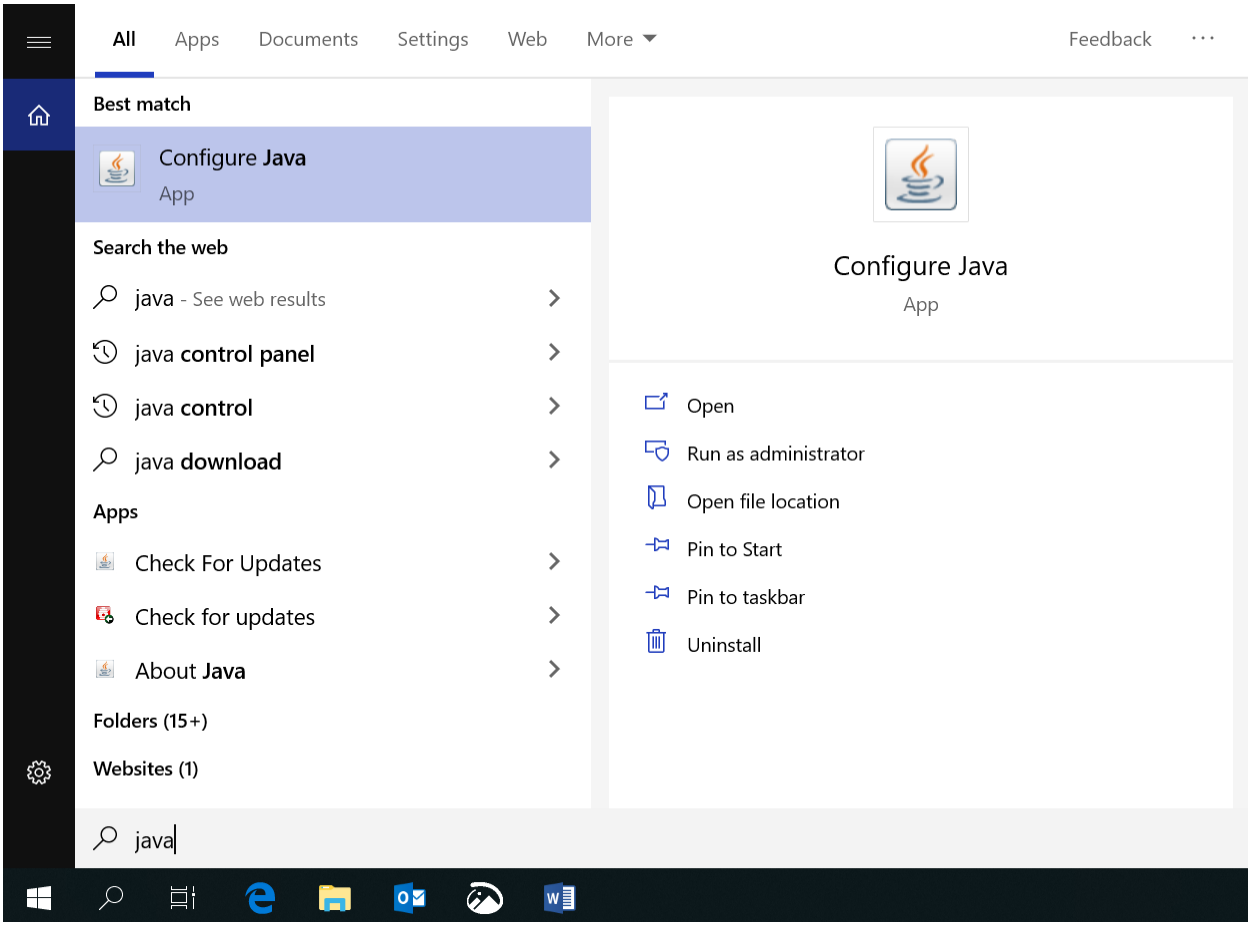
Troubleshooting

Application Blocked When Video Link is Selected

When you click the Video Link command in the Video Queue, an "Application Blocked by Java Security" message is displayed. This is because the URL for the video link is not specified in the Java Exception Site list.

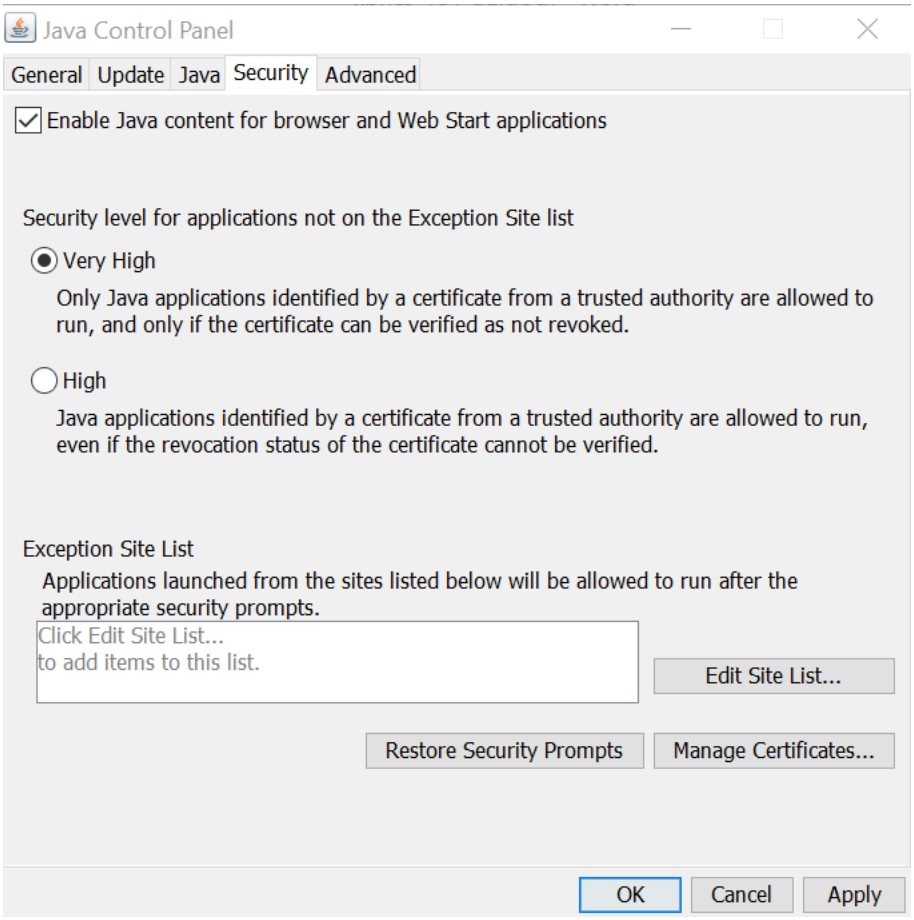
To enable the video link for the site:

1. Run the Java Control Panel as an Administrator. For example, search for Java in the Start menu, select the Configure Java icon, and click Run as administrator:



Configure Java as Administrator

2. This displays the Java Control Panel. Click the Security Tab.

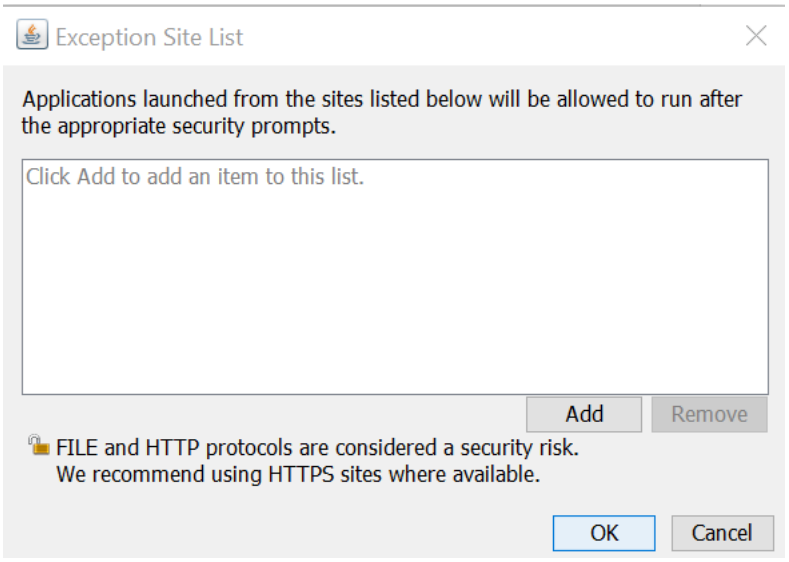


Java Control Panel, Security

Ensure that these settings are selected:

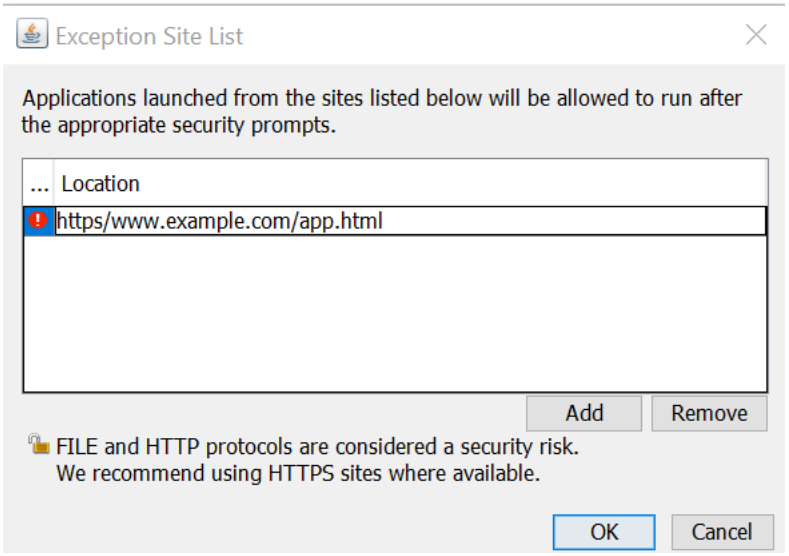
- Enable Java content for browser and Web Start applications
- Security level for applications not on the Exception Site list – Very High

3. Click **Edit Site List**. This displays the Exception Site List pop-up window:



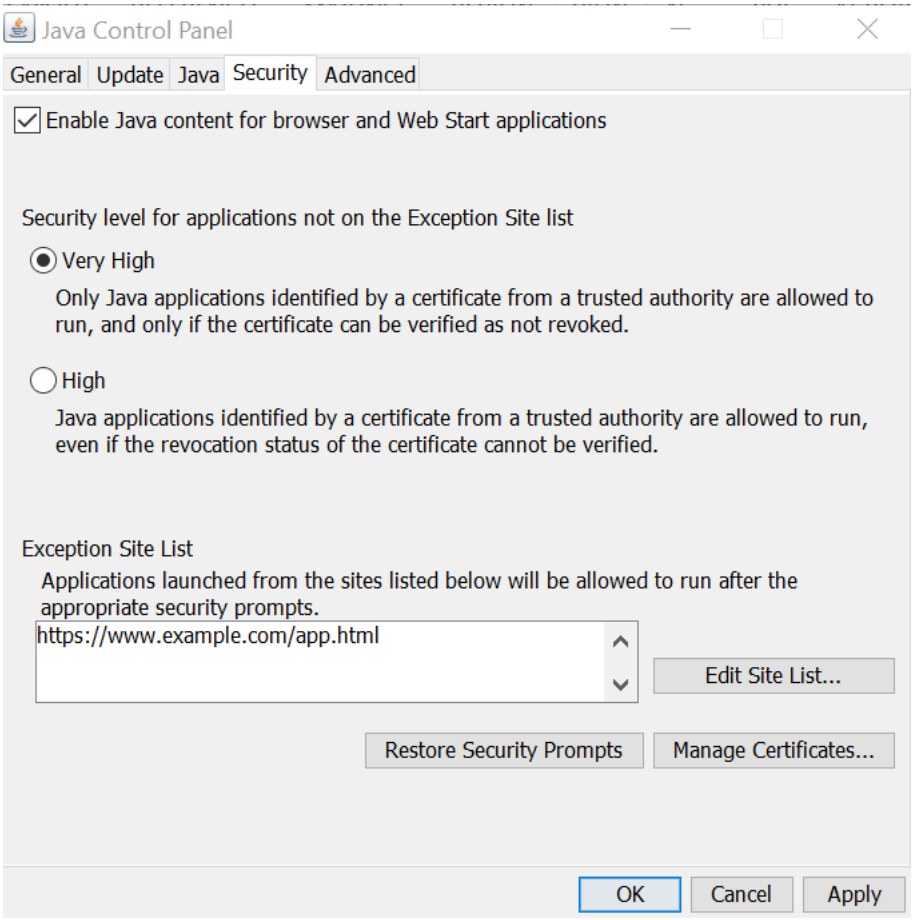
Exception Site List

4. Click **Add**. This displays a row in which to enter the URL:



Example URL

5. Enter the URL for the video vendor as in the example above, and click **OK**. This returns you to the Java Control Panel, with the new path listed in the Exception Site List:



6. Click **OK**. The URL will now be accessible when you click the video link in XBRi.

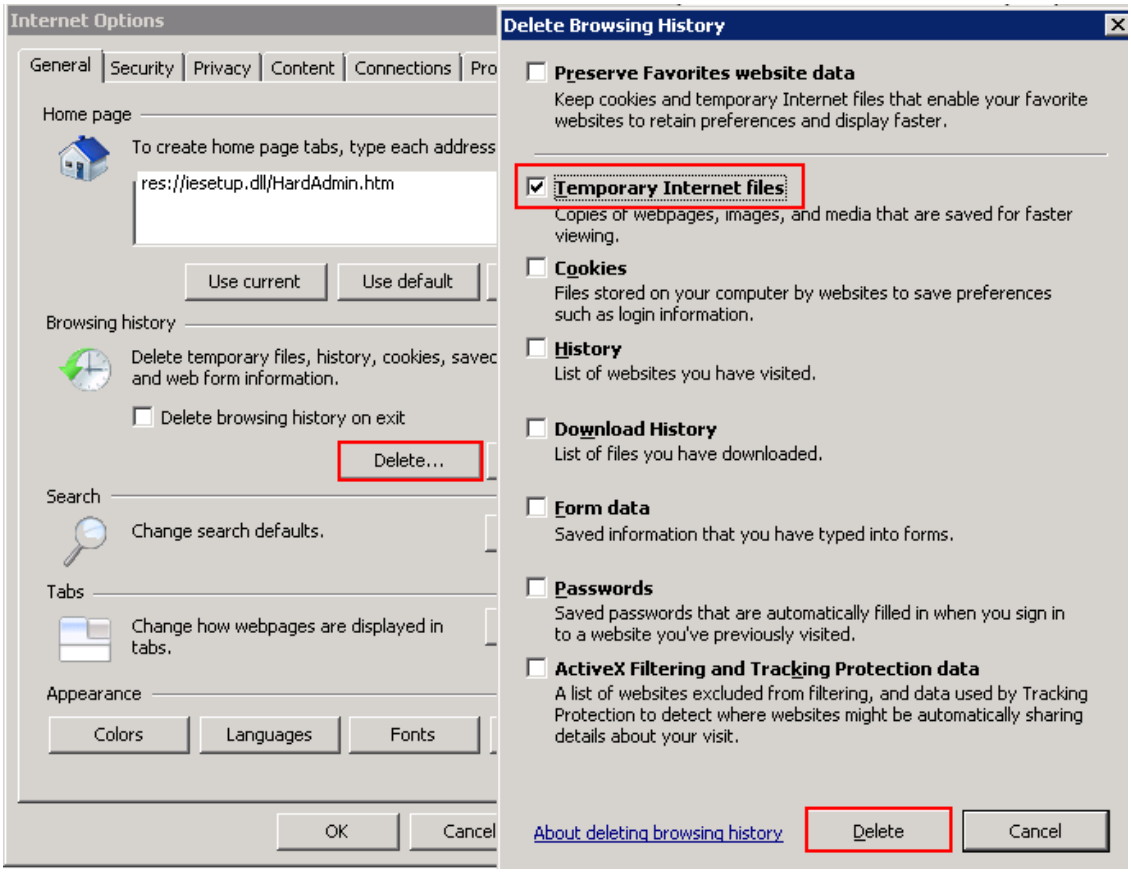
Dates Display Incorrectly in a Linked Report

If, after installation, the customer edits a link to a report, sets the date prompt to Prompt User and applys the change, when they run the linked report, and select a different date range, the dates do not display properly.

This problem has occurred with Internet Explorer.

To correct this problem:

1. Open Internet Explorer
2. Clear the browser cache of temporary internet files, as in the example below:



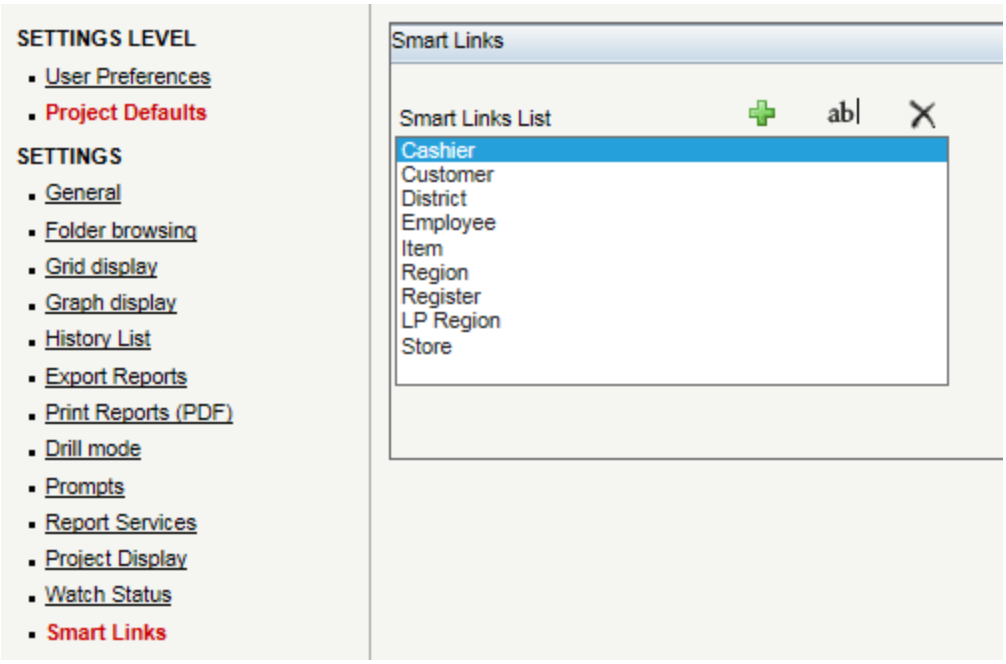
Delete Browsing History Dialog

3. From the Tools menu, select **Compatibility View Settings**.
4. Clear the Display intranet sites in Compatibility View check box.

Smart Links Do Not Work

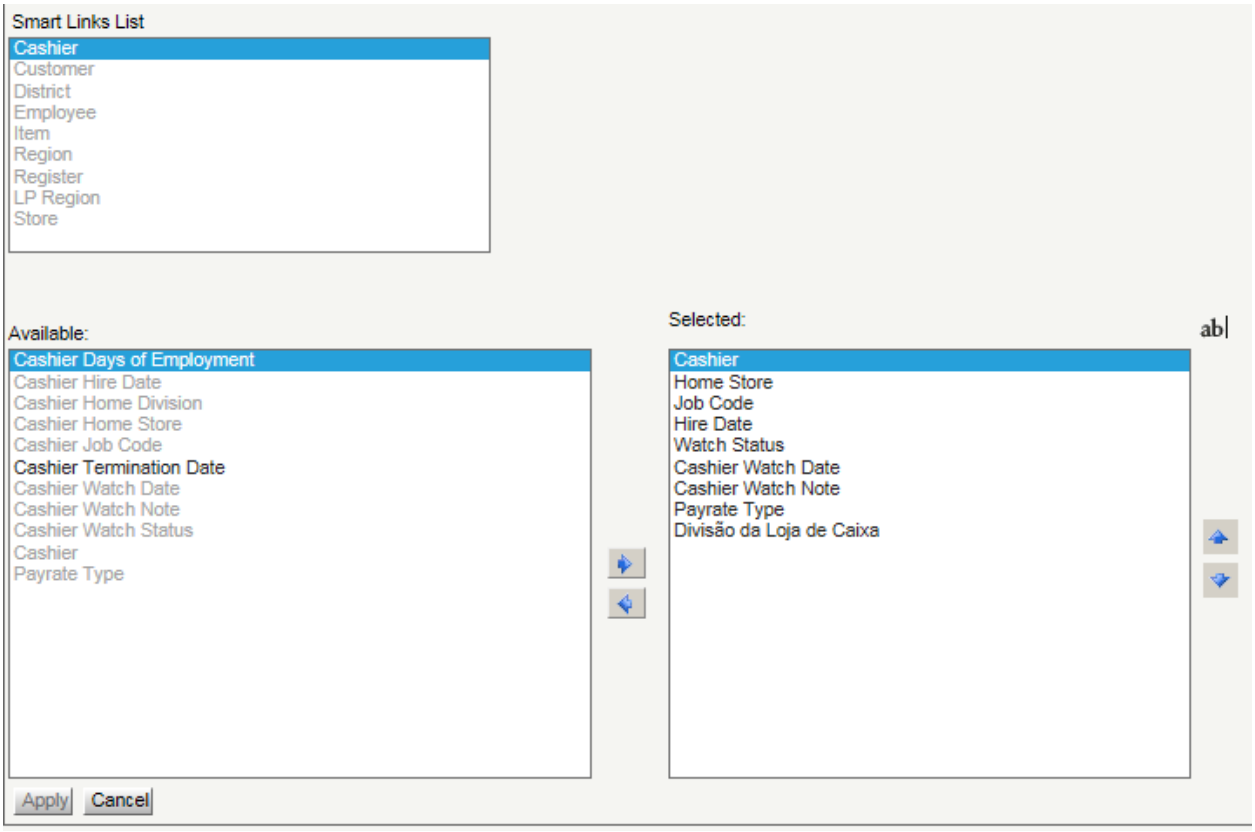
If some of the Smart Links that are set to be active after a new install or upgrade do not activate, you must re-apply the settings for those smart links in Projects.

1. Log in to XBR^{i} as the Customer Administrator
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Smart Links**. This displays the Smart Links window:



Smart Links Window

4. Select the attribute category under the Smart Links list and click the **Edit** icon. This displays the Smart Links editor:



Smart Links Editor

5. In the **Selected** box, highlight the smart link that is not working and click the **Edit** icon.
6. If necessary, edit any fields that need to be changed, and then click **OK.**

7. Click **Apply**.

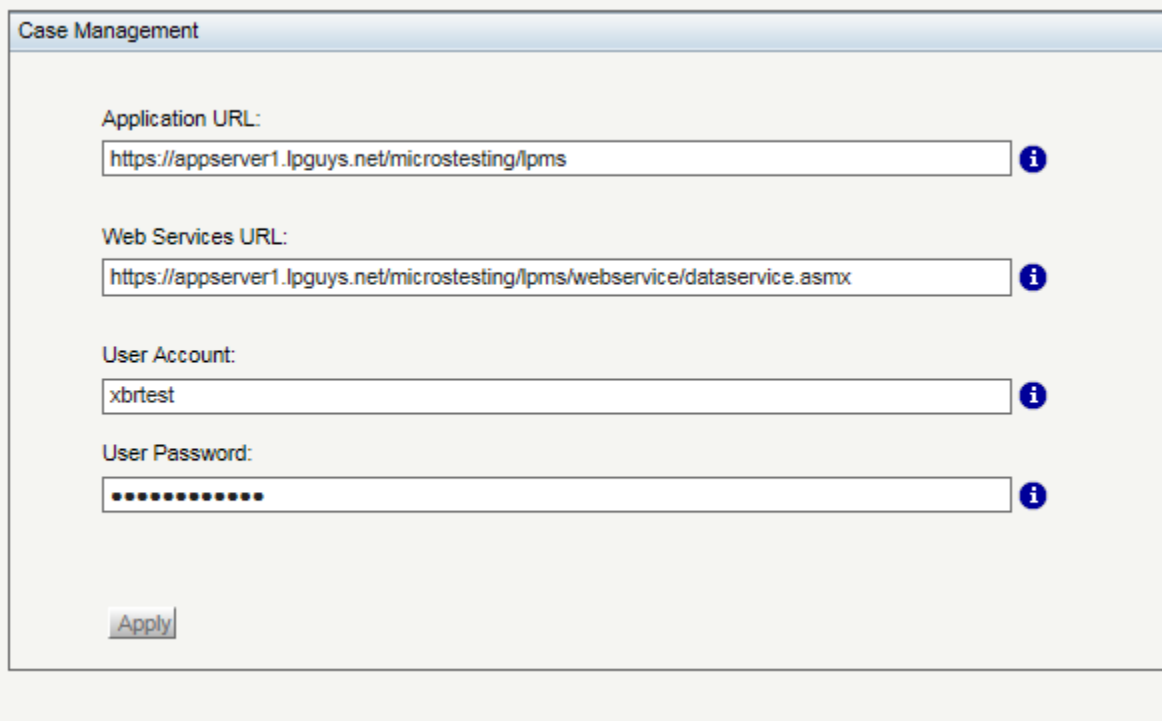
Once you select **Apply**, the smart link should now work in the reports. Repeat the steps for any other smart links that you need to activate.

Validate Case Management Connection Settings

You can validate that Case Management setting are correct in the Application Project Defaults – Case Management window.

To verify value configuration for case management in Project Defaults:

1. Log in to XBRi as a customer administrator.
2. From the Admin menu, choose Project Defaults.
3. Under Settings, click **Case Management**. This displays the Case Management window:



Case Management Window

4. Verify that the following settings are correct:

   Application URL – Fully qualified URL to access case management online.

   Web Services URL – Fully qualified URL to access vendor web services.

   User Account – Eligible account to access web services.

   User Password – Password associated with the User Account.

5. Click **Apply** to save any changes.

Video Link Does Not Connect Successfully with Certain JRE Versions

If customers run into an issue with video linking and certain JRE versions, it is recommended that they upgrade to the latest JRE version (certified up to version 55).

Customers who are running an earlier version of XBR^{i} (prior to 10.7) and run into this issue should upgrade to the latest JRE version. They should also add the Analytics Web Server to the Exception Site list in the java control panel.

To Add URLs to the Exception Site list:

1. Go to the Java Control Panel (From Windows, click **Start** and then, **Configure Java**)
2. Click the Security tab
3. Click **Edit Site List**.
4. In the Exception Site List window, click **Add**.

> **Note:** JRE version 21 is not compatible with any version of XBR^{i}.