Oracle® Retail Advanced Science Cloud Services

Administration Guide

Release 16.0.204

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Oracle Retail Advanced Science Engine Cloud Services Administration Guide, Release 16.0.204

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Preface

This guide describes the administration tasks for Oracle Retail Advanced Science Cloud Services.

Audience

This guide is intended for administrators.

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Related Documents

For more information, see the following documents in the Oracle Retail Advanced Science Cloud Services documentation set:

- *Oracle Retail Advanced Science Cloud Services User Guide*
- *Oracle Retail Advanced Science Cloud Services Implementation Guide*
- *Oracle Retail Advanced Science Cloud Services Release Notes*
- *Oracle Retail Insights Cloud Service Suite/Oracle Retail Advanced Science Cloud Services Data Interface*

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- Exact error message received
- Screen shots of each step you take

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Conventions

The following text conventions are used in this document:

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

1 Administrative Tasks

This chapter describes the processes for maintaining users and roles as well as batch processes. For information regarding standard end user activities like creating and viewing reports, please see the *Oracle Retail Advanced Science Cloud Services User Guide*.

Oracle Support

It is considered to be a best practice to have all Oracle Retail Advanced Science 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:

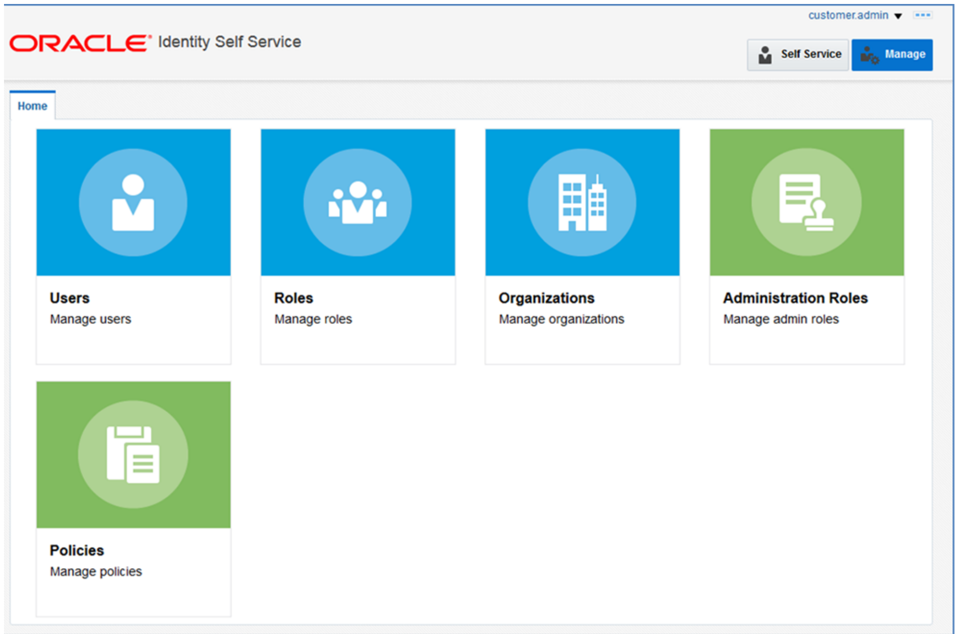
https://support.oracle.com

User Creation

Before users can access the Oracle Retail Advanced Science Cloud Services applications it is necessary to provision each user access to the system, and assign roles to each user to control what functionality will be available to them. The access provisioning is done using Oracle Identity Management (OIM). The following steps explain how to define users, assign roles and revoke access for users when needed. The OIM Application URL and the login with the required administrator access would be needed to execute the below steps:

1. Log into the OIM application.
2. Under Administration, click **Users**.

Figure 1–1 Select Users



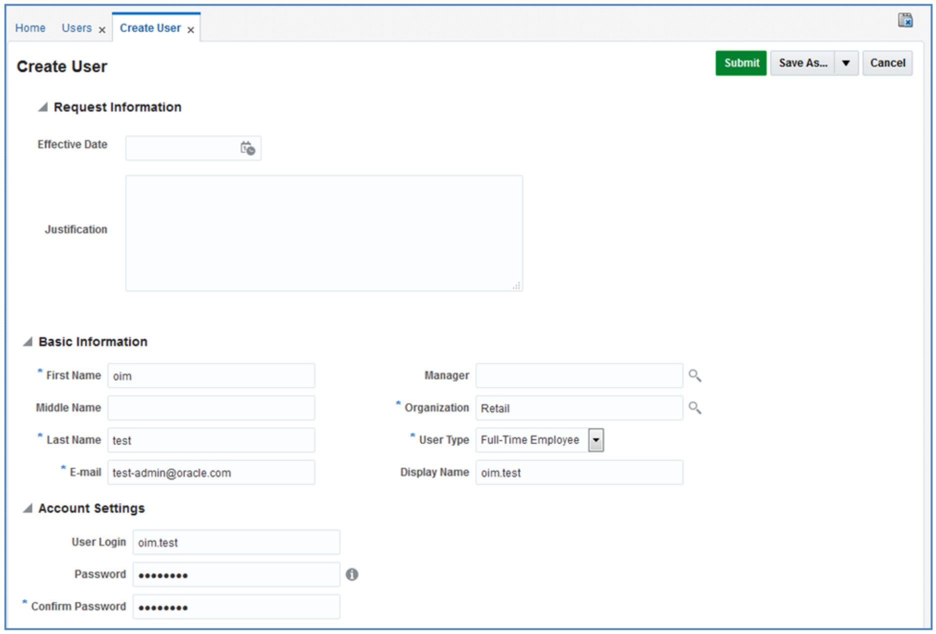
3. Under Actions, click **Create**.

Figure 1–2 Select Create

The Create User screen appears.

4. Under Basic Information, enter the following:
   - First Name
   - Last Name
   - For Organization, enter Retail
   - For User Type, enter Full time employee
   - E-mail: Email address of the employee
5. Under Account Settings, enter:
   - User Login: <firstname>.<lastname>
   - Password:
   - Confirm Password

Figure 1–3 Complete User Information



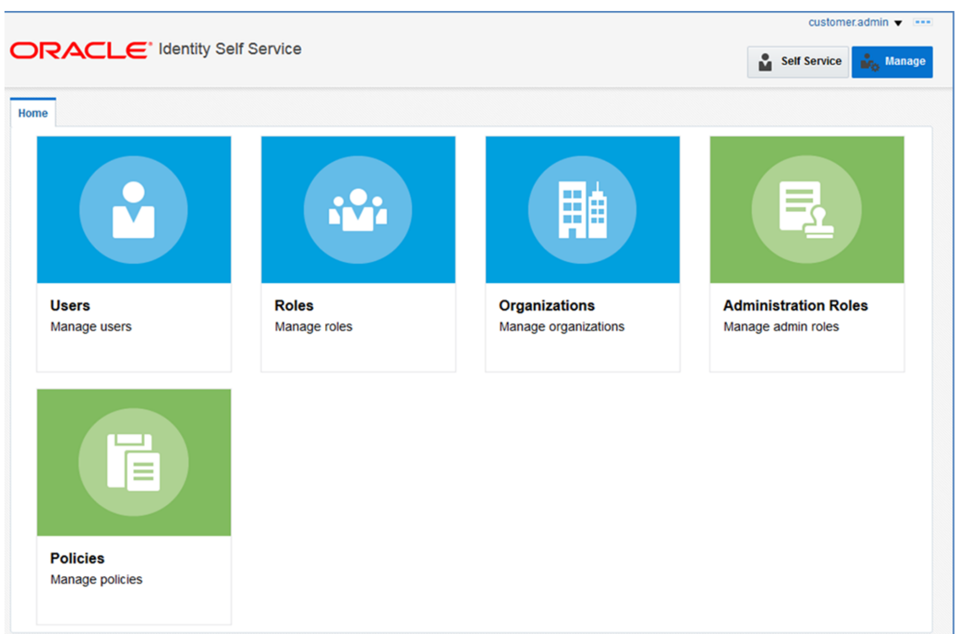
6. Click **Submit**.

Assigning Members to a Role

To assign members to a role, complete the following:

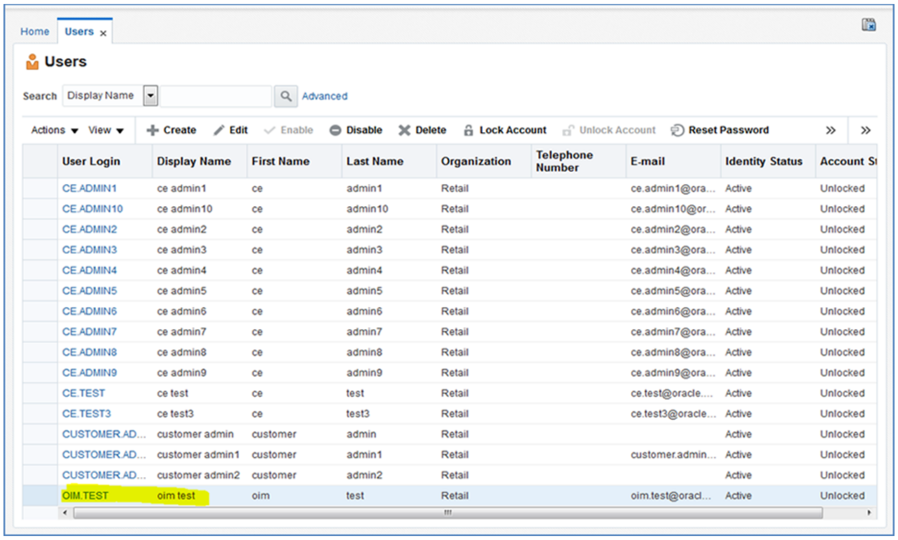
1. Log into the OIM application.
2. Click **Users**.

Figure 1–4 Select Users



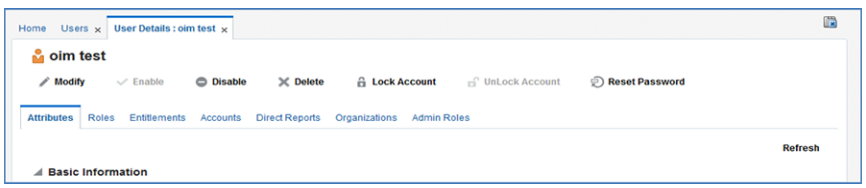
3. Click the oim.test user.

Figure 1–5 oim.test User



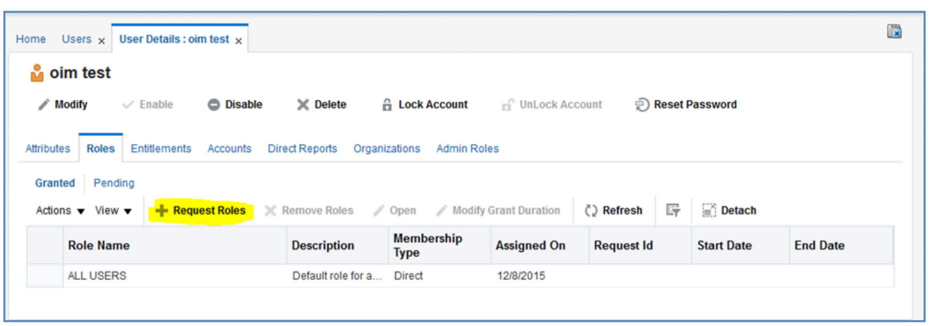
4. Click the Roles tab.

Figure 1–6 Roles Tab



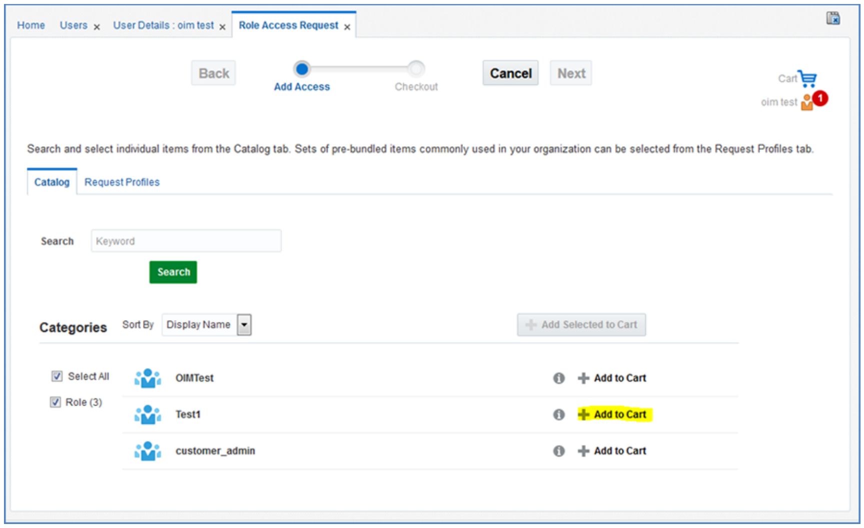
5. Click the **Request Roles** button.

Figure 1–7 Request Roles Button



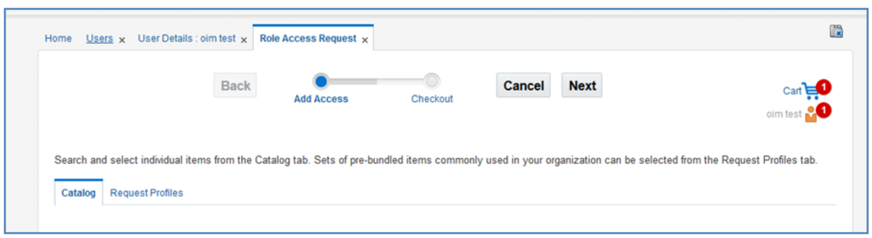
6. Click the **Add to Cart** button next to the role you want to assign.

Figure 1–8 Adding Roles to the Cart



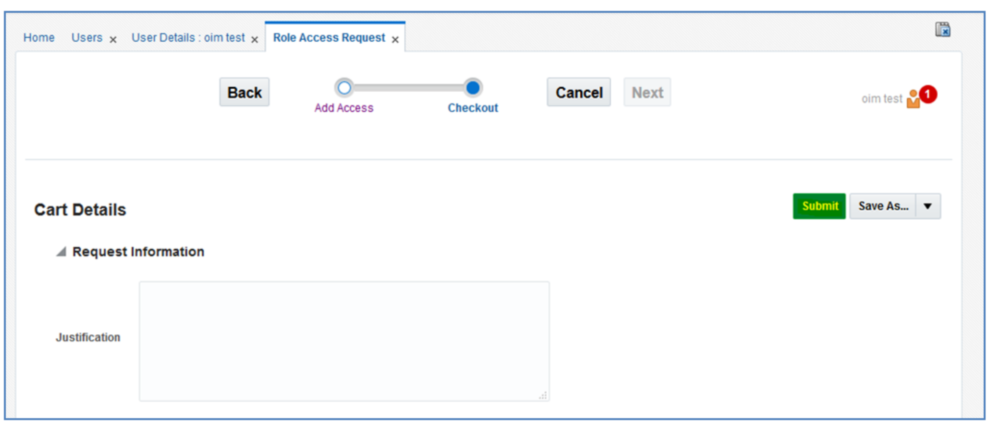
7. Click **Next**.

Figure 1–9 Add Access Request



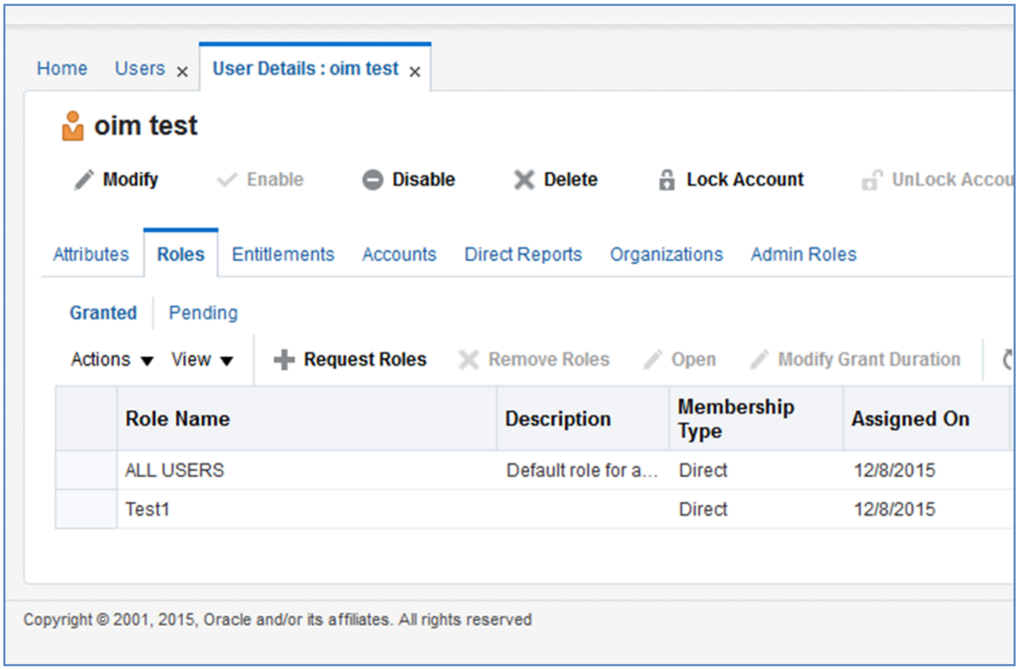
8. Click **Submit**.

Figure 1–10 Submit Access Request



The role is now assigned to the User.

Figure 1–11 User Details



Oracle Retail Advanced Science Cloud Services Default Enterprise Roles

Oracle Retail Advanced Science Cloud Services is built with role-based access. Permissions are associated with roles.

The following roles are available:

Table 1–1 Retail Advanced Science Cloud Services Default Enterprise Roles

Application Module	Default Enterprise Roles	Corresponding Application Roles Display Name
ORASE Administration	CONFIG_ADMINISTRATOR_JOB	Configuration Administrator Duty
	INTEGRATION_ADMINISTRATOR_JOB	Integration Administrator Duty
ORASE Administration - Science Innovation Workbench	DATA_SCIENCE_REST_SERVICE	Retailer Workspace RESTful Service Duty
	DATA_SCIENCE_ANALYST	Data Science Analyst Duty
	DATA_SCIENCE_ADMINISTRATOR	Data Science Advanced Duty
	DATA_SCIENCE_ORCL_ADMIN	Data Science Oracle Admin Duty
Customer Decision Tree	ANALYTIC_EXPERT_JOB	Customer Decision Tree Duty
Demand Transference	ANALYTIC_EXPERT_JOB	Demand Transference Duty

Table 1–1 (Cont.) Retail Advanced Science Cloud Services Default Enterprise Roles

Application Module	Default Enterprise Roles	Corresponding Application Roles Display Name
Assortment and Space Optimization	CATEGORY_MANAGER_JOB	Category Manager Duty
	SPACE_PLANNER_JOB	Micro Space Optimization Analyst Duty
	MERCHANDISING_ANALYST_JOB	
	SPACE_ADMINISTRATOR_JOB	ASO Administrator Duty
	FORECAST_MANAGER_JOB	Analytic Super User Duty
Advanced Clustering	ASSORTMENT_PLANNER_JOB	Advanced Clustering Business Duty
	MERCHANDISER_JOB	
	CLUSTERING_ADMINISTRATOR_JOB	Advanced Clustering Advanced Duty
Customer Segmentation	ASSORTMENT_PLANNER_JOB	Customer Segmentation Business Duty
	MERCHANDISER_JOB	
	MARKET_ANALYST_JOB	
	CUSTOMER_ANALYST_JOB	
	CUSTOMER_SEGMENT_ADMINISTRATOR_JOB	Customer Segmentation Advanced Duty
Attribute Binning	ATTRIBUTE_BINNING_JOB	Attribute Binning Duty
Social Analytics	SOCIAL_ANALYTICS_JOB	Social Analytics Duty
Attribute Extraction	ATTRIBUTE_EXTRACTION_JOB	Attribute Extraction Duty
Return Logistics	RETURN_LOGISTICS_JOB	Return Logistics Duty
Retail Home	RETAIL_HOME_ADMIN	
Pricing	PRICING_ADMINISTRATOR_JOB	Pricing Administrator Duty
	PRICING_MANAGER_JOB	Pricing Super User Duty
	PRICING_ANALYST_JOB	Pricing Analyst Duty
	OO_BUYER_JOB	Buyer Duty
Hospitality	HOS_FORECAST_ANALYST	Hospitality Forecast Analyst Duty
	HOS_FORECAST_CORPORATE_ANALYST	Hospitality Forecast Corporate Analyst Duty
	HOS_FORECAST_STORE_MANAGER	Hospitality Forecast Store Manager Duty
Menu Recommendation	MENU_RECOMMENDATION_JOB	Menu Recommendation Duty
ORAAC	INSIGHT_APPLICATION_ADMINISTRATOR_JOB	ADMIN_CONSOLE_WITHOUT_SECURITY_DUTY

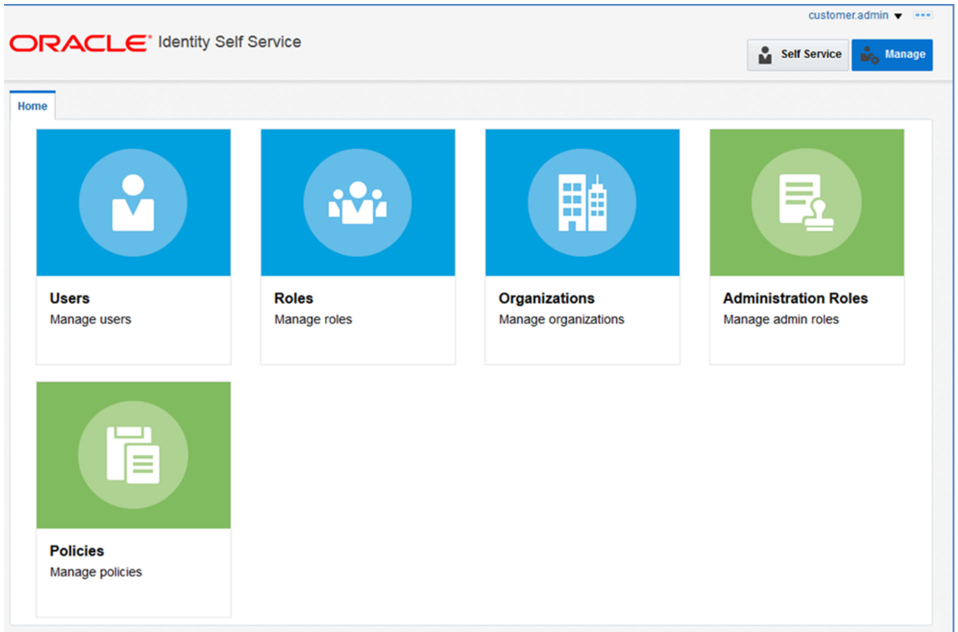
Assign the above roles to the user following the steps mentioned in the previous section as per your requirement.

Revoking Role Membership

To revoke the membership of a member in a role:

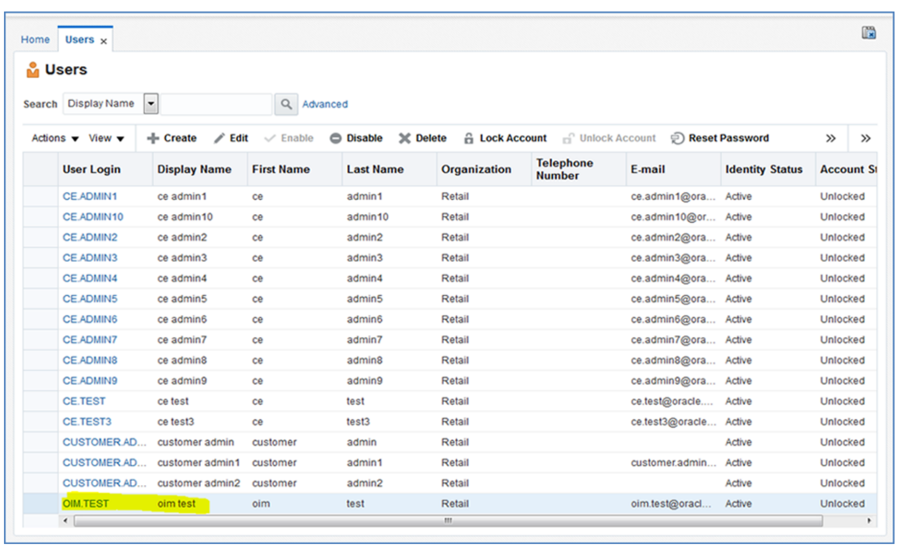
1. Log into the OIM application.
2. Click **Users**.

Figure 1–12 Select Users



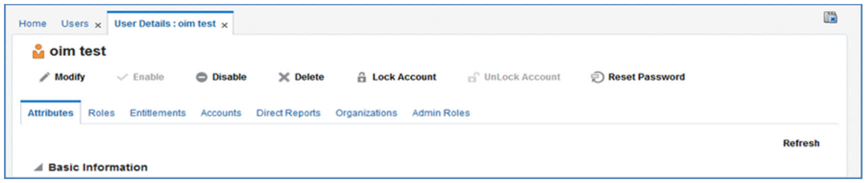
3. Click the oim.test user.

Figure 1–13 Select Role to Revoke Users



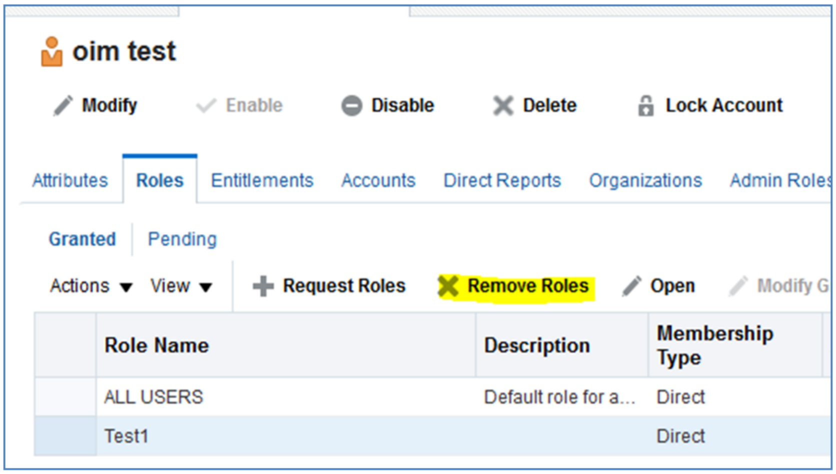
4. Click the Roles tab.

Figure 1–14 Roles Tab



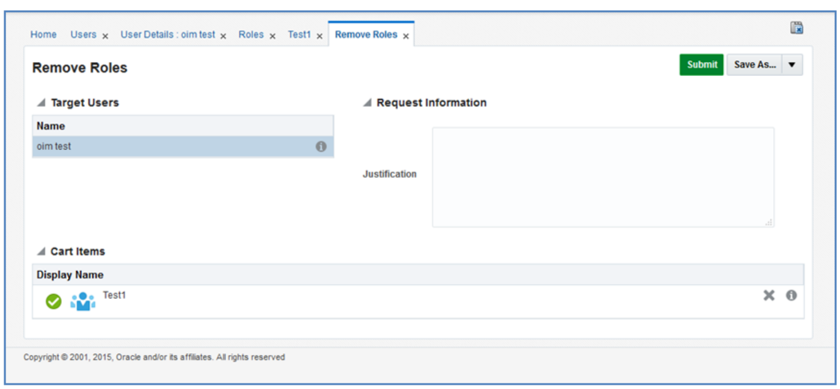
5. Select the Role you want to revoke and click the **Remove Role** button.

Figure 1–15 Remove Roles Button



6. In the Remove Roles screen, click **Submit**.

Figure 1–16 Remove Roles Screen

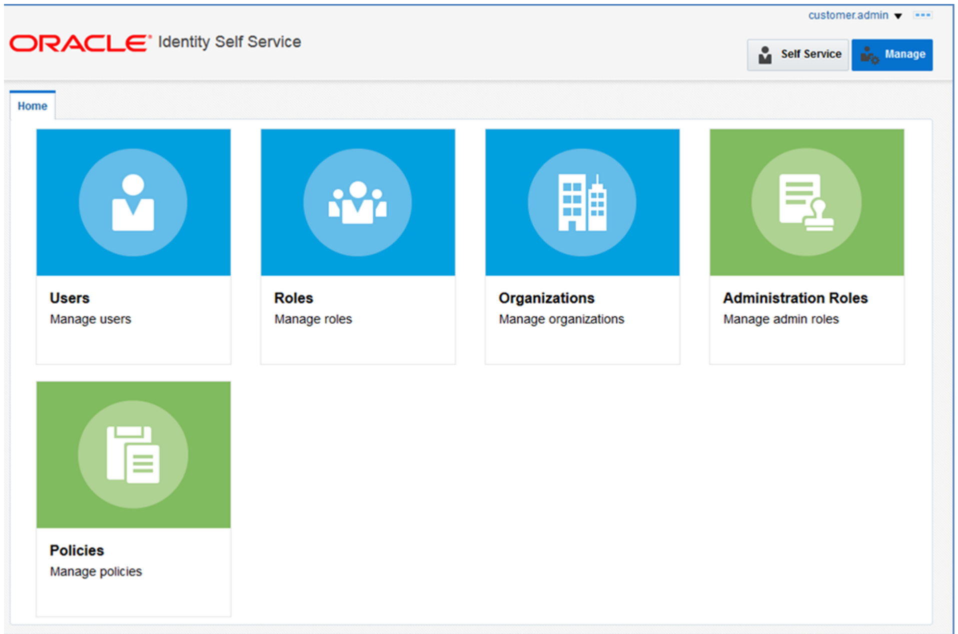


Deleting a User or Disabling User Privileges

To delete or disable a user

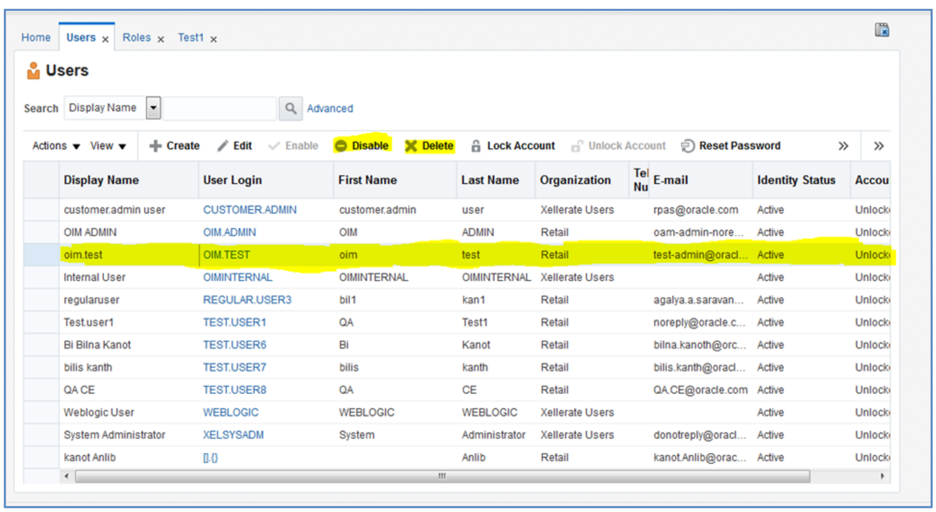
1. Log into the OIM application.
2. Under Administration, click **Users**.

Figure 1–17 Select Users



3. Select the user and click **Disable** or **Delete** as necessary.

Figure 1–18 Delete and Disable



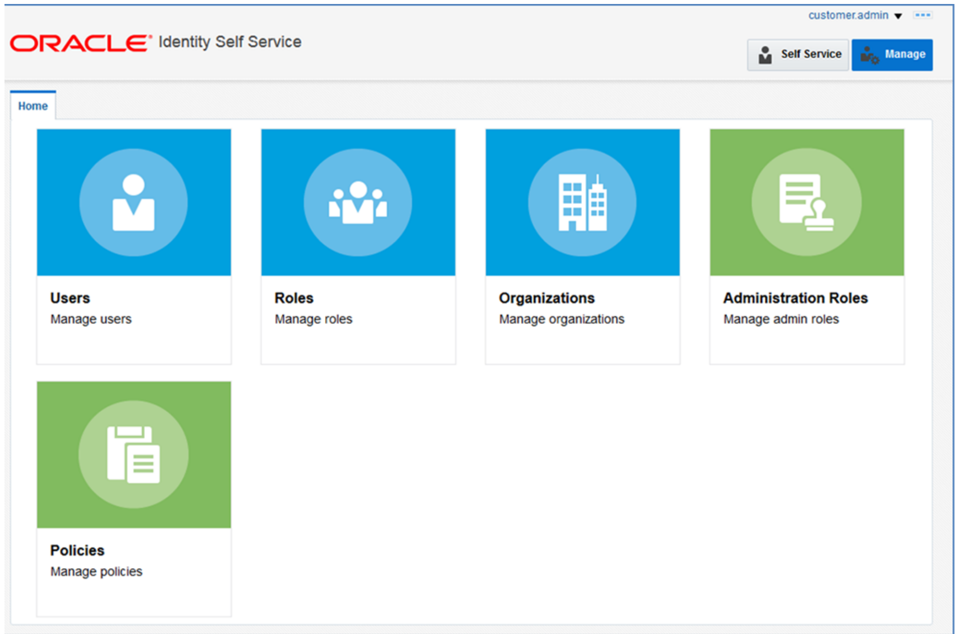
4. You can also Lock or Unlock a particular user from the same screen if needed.

Resetting a User Password

To reset the password of a user:

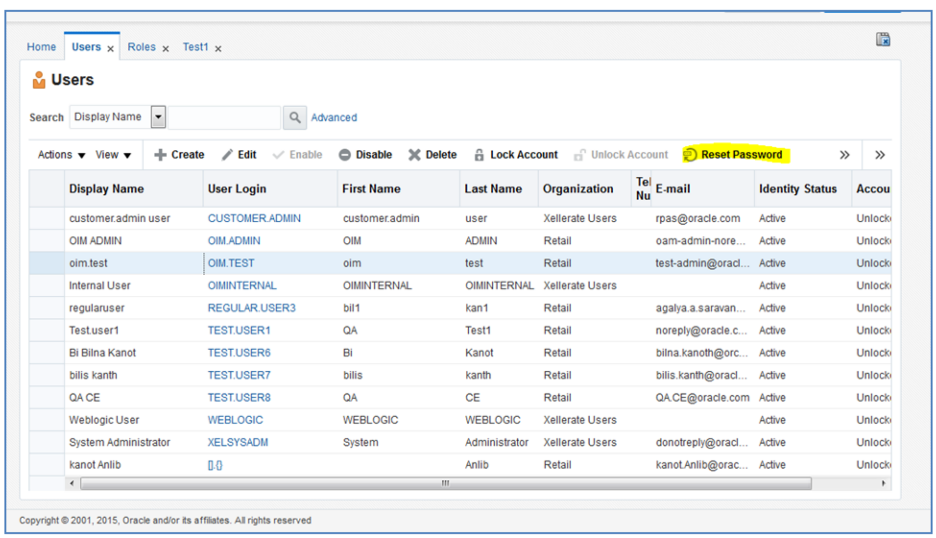
1. Log into the OIM application.
2. Under Administration, click **Users**.

Figure 1–19 Select Users



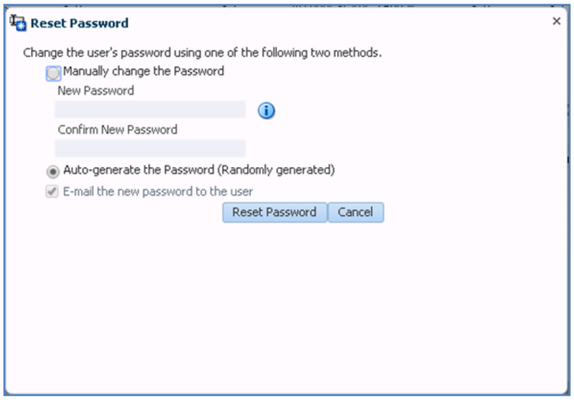
3. Click the **Search** tab and then select on the User you want to reset the password.
4. Click on Reset Password.

Figure 1–20 Reset Password Button



5. In the Reset Password screen, make sure Auto-generate the Password is selected and Click on Reset Password. (The system will auto generate the password and will email it to the user.)

Figure 1–21 Reset Password

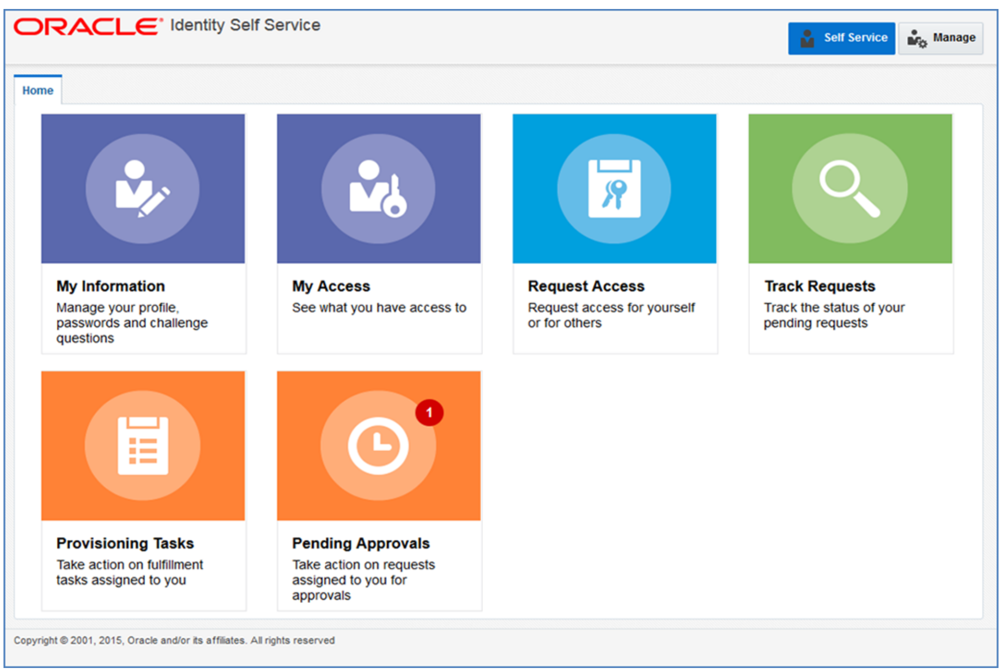


Approve Requests from User

The users can also request for the Roles or revoke those that are available for him to access the ORASE Service. Below are the steps to approve the request from the User.

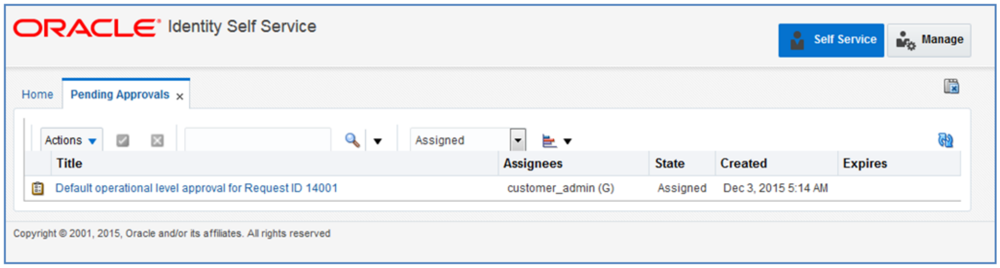
1. Login into OIM Application.
2. Click **Pending Approvals**.

Figure 1–22 Select Pending Approvals



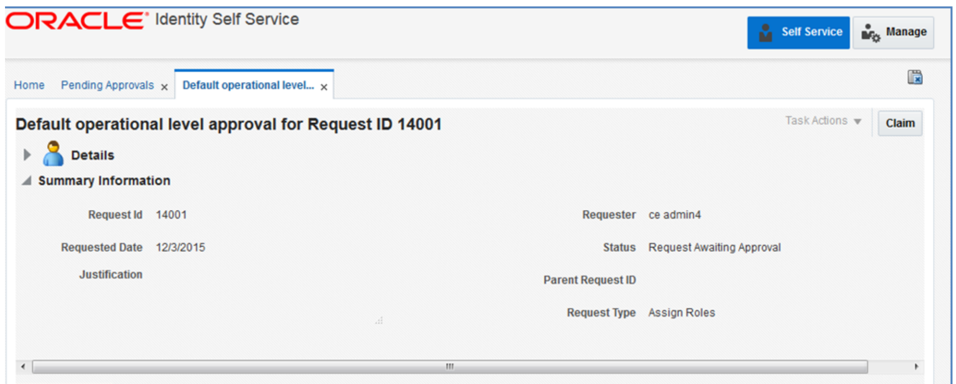
3. Click on the Action that is assigned to you.

Figure 1–23 Pending Approvals Tab



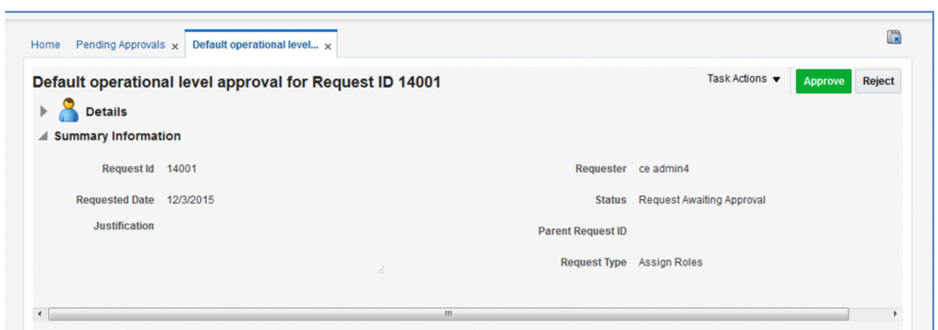
4. Click the **Claim** button.

Figure 1–24 Claim the Pending Approval



5. Click **Approve** or **Reject**.

Figure 1–25 Approve Pending Approval



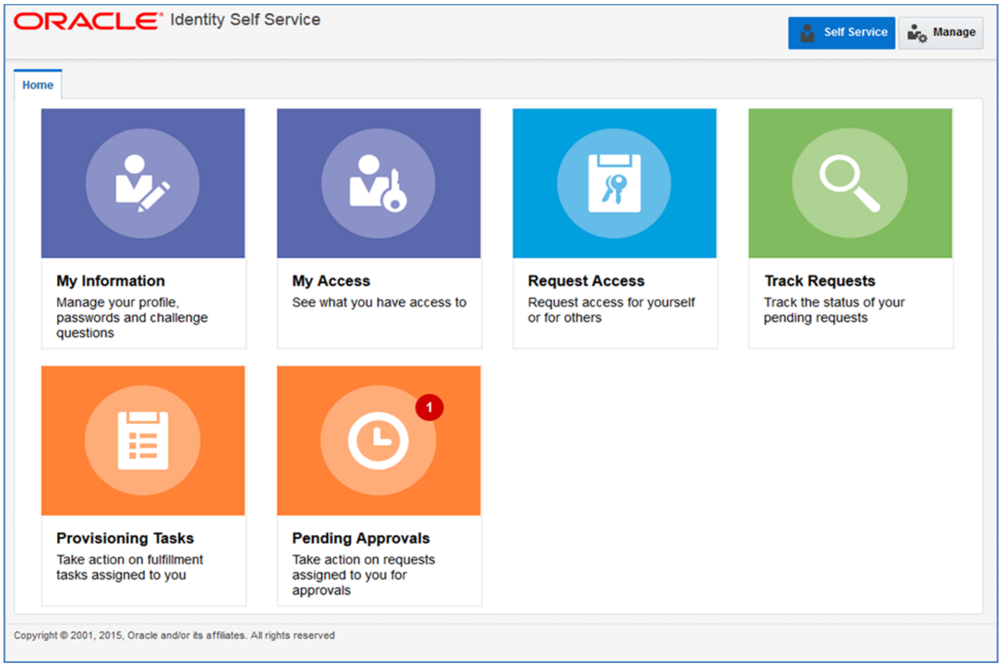
6. Once done the request is completed.

Approve Requests from User for Multiple Roles

The users can also request for the multiple Roles or revoke them if they are available for him to access the ORASE Service. Below are the steps to approve the request from the User.

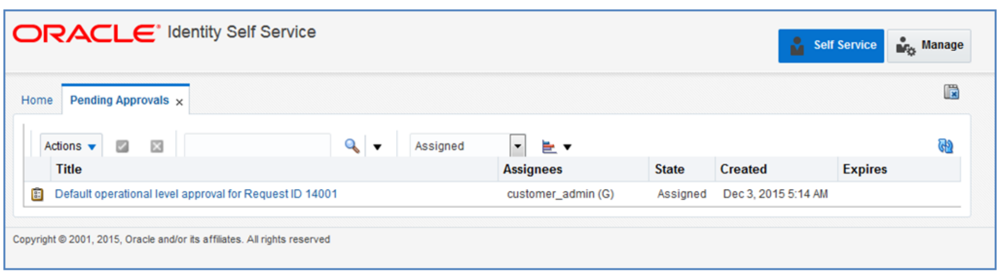
1. Login into OIM Application.
2. Click **Pending Approvals**.

Figure 1–26 Select Pending Approvals



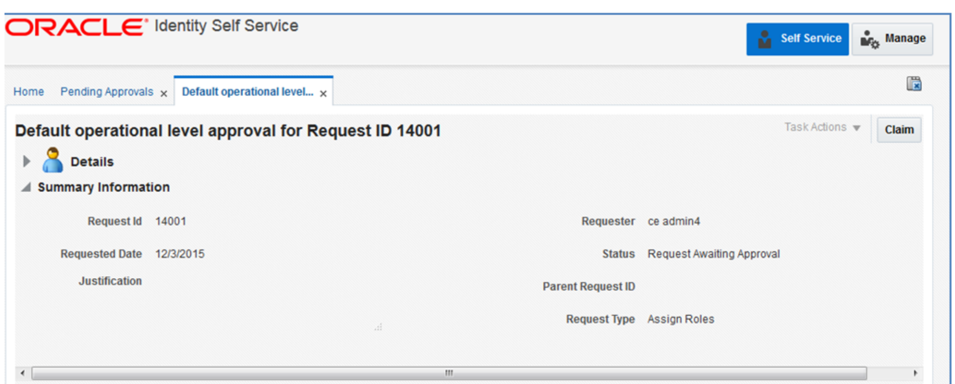
3. Click on the Action that is assigned to you.

Figure 1–27 Pending Approvals Tab



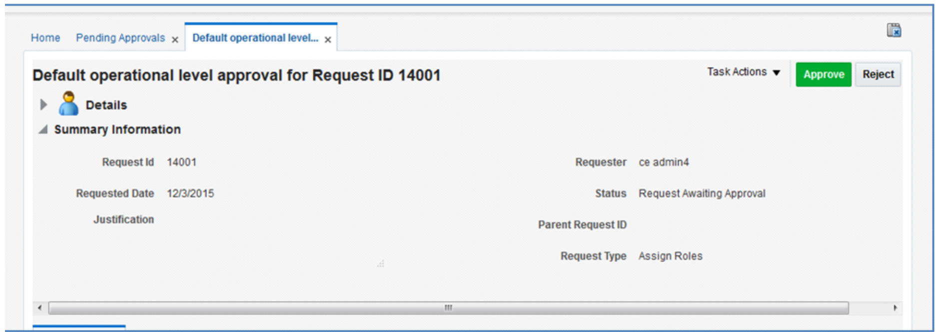
4. Click the **Claim** button.

Figure 1–28 Claim the Pending Approval



5. Click **Approve** or **Reject**.

Figure 1–29 Approve Pending Approval



6. Once done, if approved, the request is split into multiple requests, one for each role for each user. Approve all of them by following steps 3 to 5.

7. Once all the requests are approved, all the roles will be assigned to users.

Note: The customer administrator can request multiple roles for multiple users. Once this request is made, the customer administrator is required to approve the request using the Approve Requests from User for Multiple Roles process.

Importing a Batch of User Accounts

If you have batch of users that have to be created, the Oracle team can bulk load the users into the OIM Application. When users are bulk loaded their initial password will be set to the current password of a template user. The new users will be required to change their password on first login.

To request the creation of accounts by bulk loading, follow the below steps.

1. Create CSV file listing all users to create (see example below).

2. Create or identify a user to whose password will be used as the initial password for all created users.

3. Open an SR with Oracle support and provide the CSV file and user from steps 1 and 2.

```
##################
 filename.csv
###################
##########################################
USR_LOGIN,USR_FIRST_NAME,USR_LAST_NAME,USR_EMAIL,ORG_NAME
ce.admin1,ce,admin1,ce.admin1@oracle.com,Retail
ce.admin2,ce,admin2,ce.admin2@oracle.com,Retail
ce.admin3,ce,admin3,ce.admin3@oracle.com,Retail
ce.admin4,ce,admin4,ce.admin4@oracle.com,Retail
ce.admin5,ce,admin5,ce.admin5@oracle.com,Retail
ce.admin6,ce,admin6,ce.admin6@oracle.com,Retail
ce.admin7,ce,admin7,ce.admin7@oracle.com,Retail
ce.admin8,ce,admin8,ce.admin8@oracle.com,Retail
ce.admin9,ce,admin9,ce.admin9@oracle.com,Retail
ce.admin10,ce,admin10,ce.admin10@oracle.com,Retail
##########################################
```

Bulk Role Membership Update (Optional)

If you have quite a few users that have roles to be assigned to, the Oracle team can bulk update the role membership into the OIM Application.

To update the membership of the by bulk update, follow the below steps.

1. Create CSV file with the user role mapping. Please note that the user name must be in upper case (see example below).
2. Open an SR with Oracle support and provide the CSV file and user from steps 1.

```
##################
 role.csv
###################
##########################################
UGP_NAME,USR_LOGIN
Role1,CE.ADMIN1
Role2,CE.ADMIN1
Role1,CE.ADMIN2
Role3,CE.ADMIN3
Role4,CE.ADMIN4
Role5,CE.ADMIN5
Role6,CE.ADMIN6
Role7,CE.ADMIN7
Role8,CE.ADMIN8
Role2,CE.ADMIN8
Role2,CE.ADMIN9
##########################################
```

> **Note:** If you want more than one role attached to a particular user, add one more row with the role that you want the user to have and the user name. Refer to the CE.ADMIN1 in above table for example.

Nightly Batch File Uploads

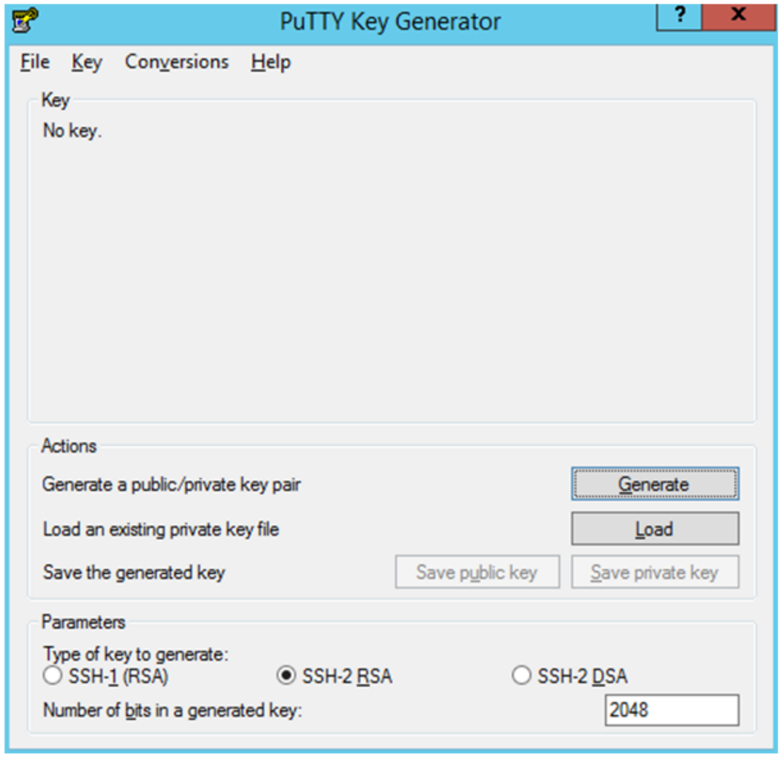
The following is the file upload process. For details regarding file contents and formatting please refer to the *Oracle Retail Advanced Science Cloud Services Integration Guide*. The Private/Public Keys must be generated and the public Key must be associated with your SFTP Account for the file uploads. The Adding Authorized Keys section describes the step-by-step method to generate the Keys (2048 bit RSA Keys).

Adding Authorized Keys

The following is the process to generate a 2048 bit RSA key and add the same to the SFTP server. This is done with the help of WinSCP tool on Windows. However the same can be done using ssh-keygen on Linux as well.

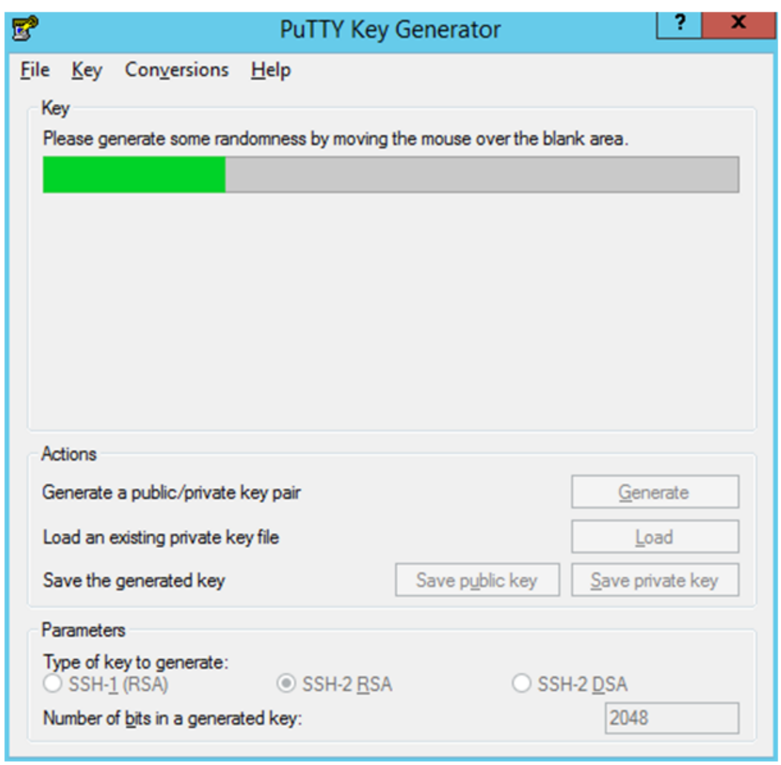
1. Launch WinSCP and select Tools -> Run PuttyGen.
2. Select "SSH-2 RSA" for the type of key to generate and enter "2048" for the number of bits in a generated key field and click **Generate**.

Figure 1–30 Key Generator



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

Figure 1–31 Key Generator Progress



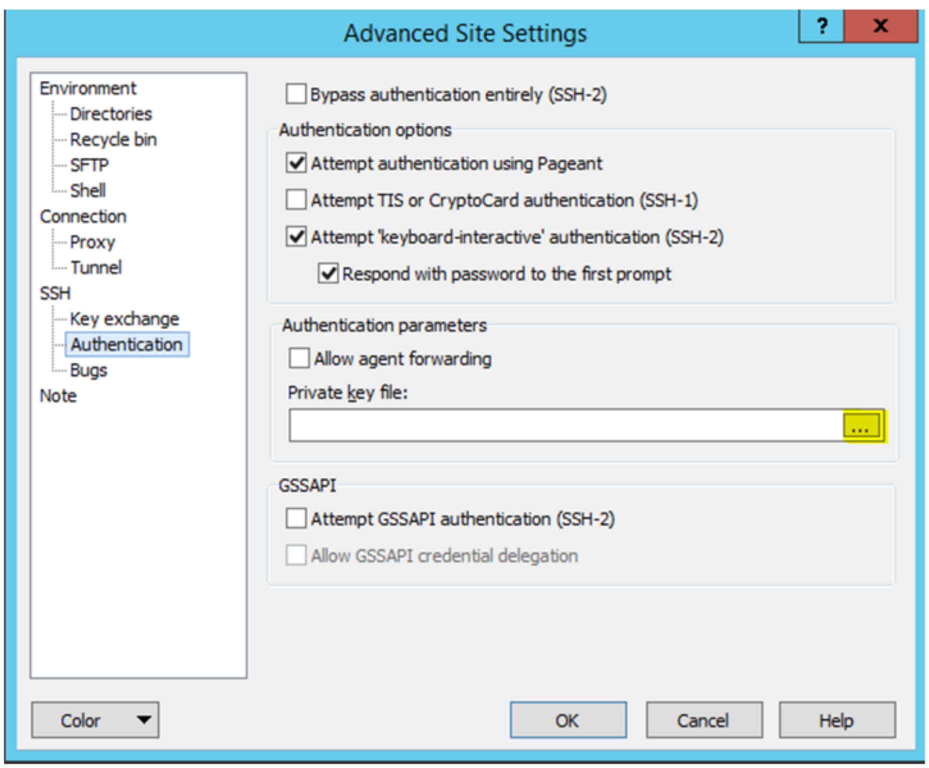
4. Once the key is generated, click the **Save public key** button to save the public key to a file.
5. Click the **Save private key** button to save the Private key to a file. Confirm to save it with/without a passphrase.
6. Open an SR with Oracle Support, to associate the Public half of the Key with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

Steps – Login to WinSCP

The Upload steps uses the private key generated in the earlier section.

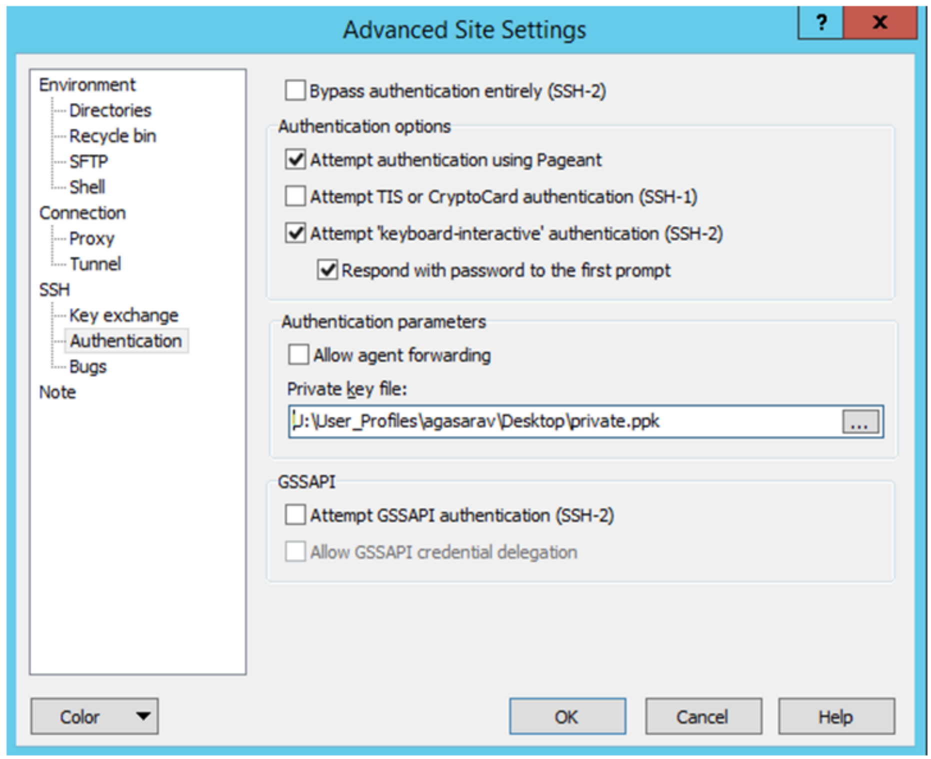
1. Launch WinSCP and connect to <SFTP Server> using port 22.
2. Enter the username and click **Advanced**.
3. Click **Authentication**.
4. In the Private Key File field, click the **Browse** button and select the private key created in the earlier section.

Figure 1–32 Advanced Site Settings Dialog



5. After loading the private key file, click **OK**.

Figure 1–33 Private Key File Loaded



6. Click **Login**. The window does not prompt for a password and logs into the SFTP server. Provide a passphrase if one has been set up.

Steps to Upload the Batch File

Login to the WinSCP by Following the Steps – Login to WinSCP section.

1. Transfer all data files to the directory /<SFTP User>.
2. Create a directory called COMMAND under /<SFTP User>if it does not already exist.
3. Change to the /<SFTP User>/COMMAND directory.
4. Transfer an empty file called COMPLETE.

Export File Downloads

Login to the WinSCP by following the Steps – Login to WinSCP section. The following is the download file process.

1. Change directory to /<SFTP User>/EXPORT.
2. Download all data files.

2 Science Innovation Workbench

Science Innovation Workbench is a retailer workspace that provides read-only access to ORASE cleansed data. This extension is a workspace for advanced analytics users to add a new implementation using Oracle Advanced Analytic (Oracle R/ODM) algorithms that are implemented as SQL/PLSQL functions. This chapter provides the steps to configure the retailer workspace for the retailer in a cloud environment.

Workspace

A workspace <RETAILER_WORKSPACE> is predefined for the retailer and is where workspace users can create database objects and applications. The workspace has the privilege to the allocated <RETAILER_WORKSPACE_SCHEMA> database schema.

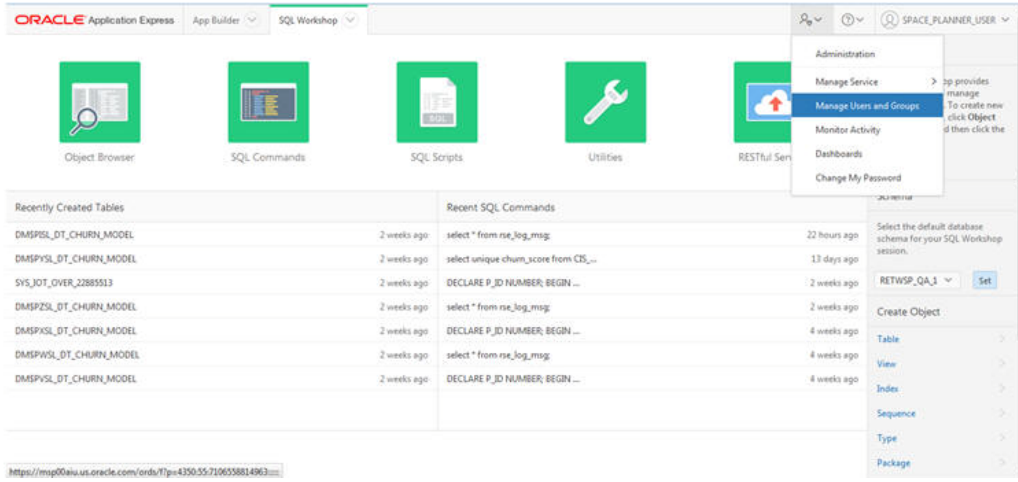
Users and Roles

Science Innovation Workbench has two types of users, application developers and workspace administrators, using Application Express. As a workspace administrator, you can create and edit developer accounts, manage groups, and manage development services. Before you create a developer for the science innovation workbench, you must create a user in Oracle Identity Management with the same credentials.

Science Innovation Workbench Developer

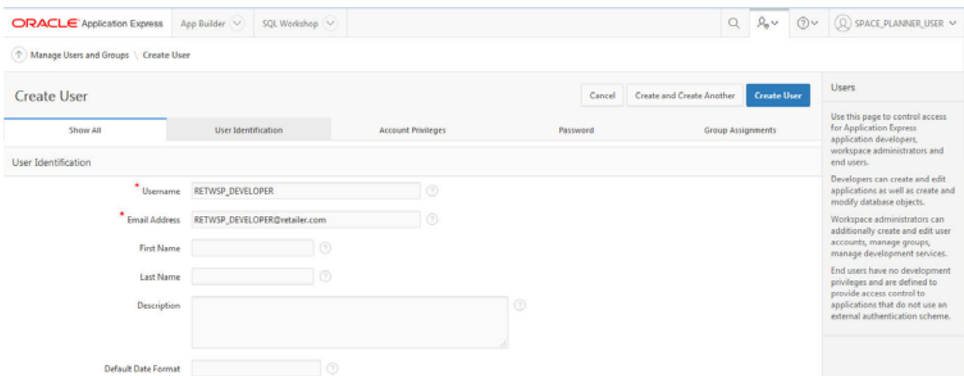
As a workspace administrator, you create a workbench developer by selecting Manage Users and Groups, as shown in Figure 2–1. Developers can create and modify applications and database objects in the allocated workspace and schema. Developers have privileges required by Oracle Data Mining and Oracle R Enterprise for executing analytic models. Complete the following steps to accomplish these tasks.

Figure 2–1 Manage Users and Groups



1. Use the Oracle APEX Create User screen shown in Figure 2–2 to create a new developer account and to assign a RESTful Service group.

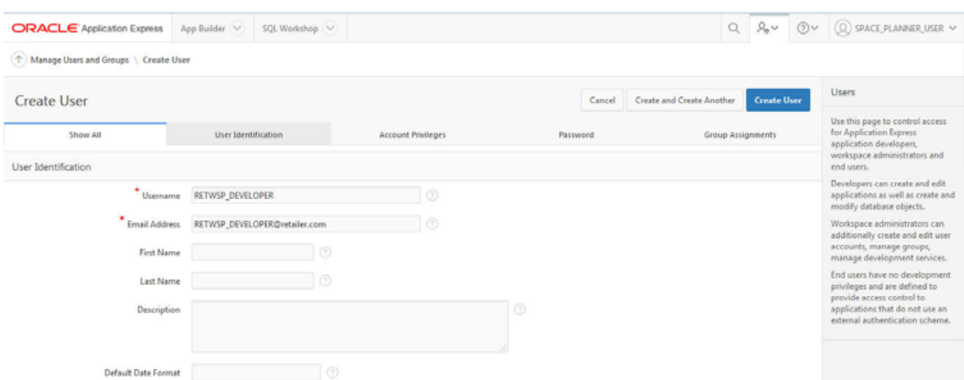
Figure 2–2 Create User



Note that this user must also be created in Identity Management with the same username/password.

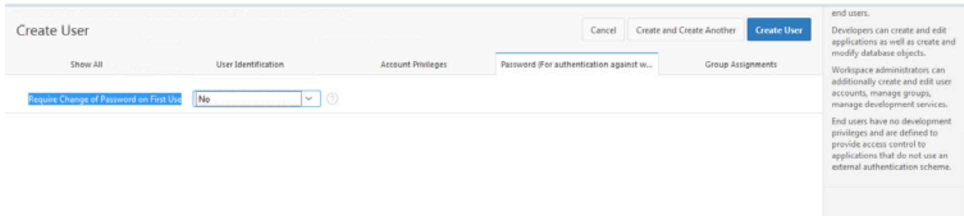
2. Assign the new developer account to a RESTful Service group, as shown in Figure 2–3.

Figure 2–3 RESTful Service Group



3. Set Require Change of Password on First Use to **No**.

Figure 2–4 Require Change of Password on First Use



3

Retail Home

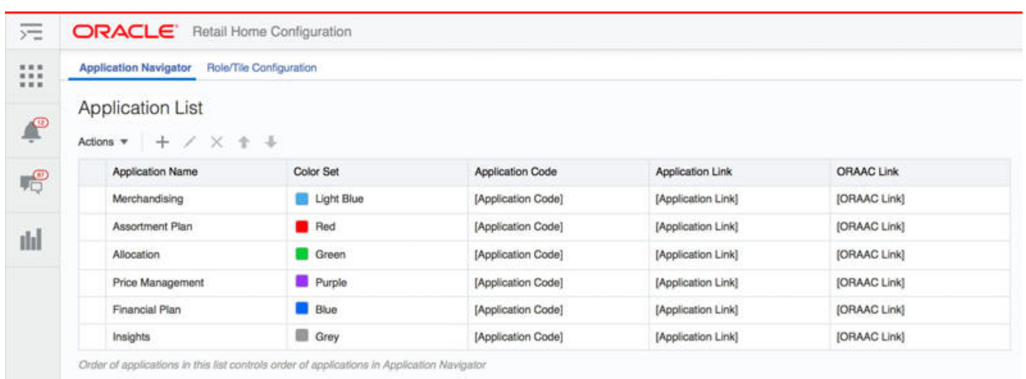
Retail Home is a portal-type application for the RGBU enterprise. The UI consists of a tile-based configurable dashboard that highlights important metrics and KPIs across RGBU applications.The persona-based dashboards are configured by a Retail Home administrator for each enterprise role.

Application Configuration

The application links available in Retail Home are launched from dashboard tiles. To configure these links, complete the following steps:

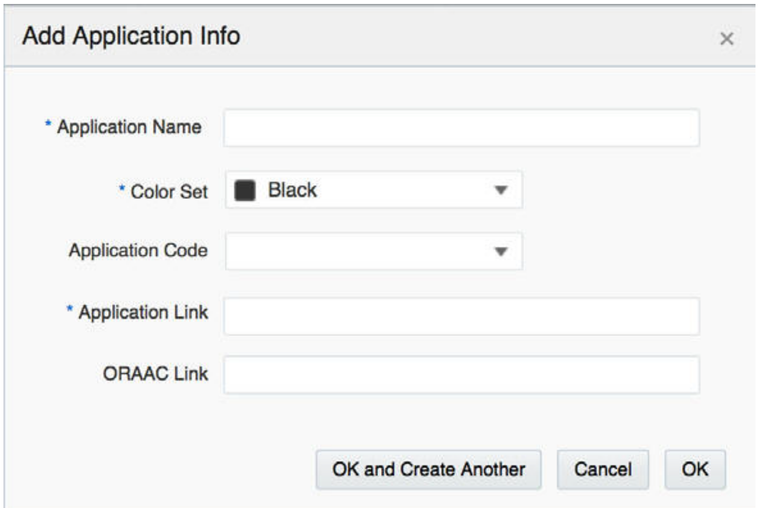
1. Select Manage Application Navigator from the task menu. The Application List is displayed. If no application have been added, the list will be empty.

Figure 3–1 Application List



2. To add an application to the list, click the **Add** icon in the Application List. The following dialog box is displayed.

Figure 3–2 Add Application Info



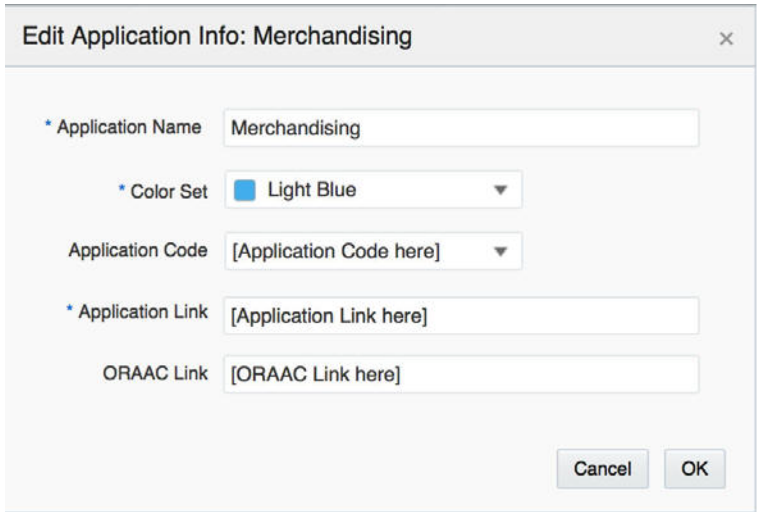
3. Provide the following information in the fields of the Add Application Info dialog box:

   - Application Name. The name entered is used to the tile header and for the application name in the Navigator.
   - Color Set. The color selected is used in the tile header and background color. The color sets are pre-defined.
   - Application Code. Select from the drop-down list. This field is optional.
   - Application Link. The link is used to launch the application from the tile header. This field is optional.
   - ORAAC Link. If a link is provided, then all the tasks associated with the application in question are displayed in the administration group of the Settings menu. This field is optional.

4. After adding an application, click **OK** to finish adding or click **OK and Create Another** to add another application.

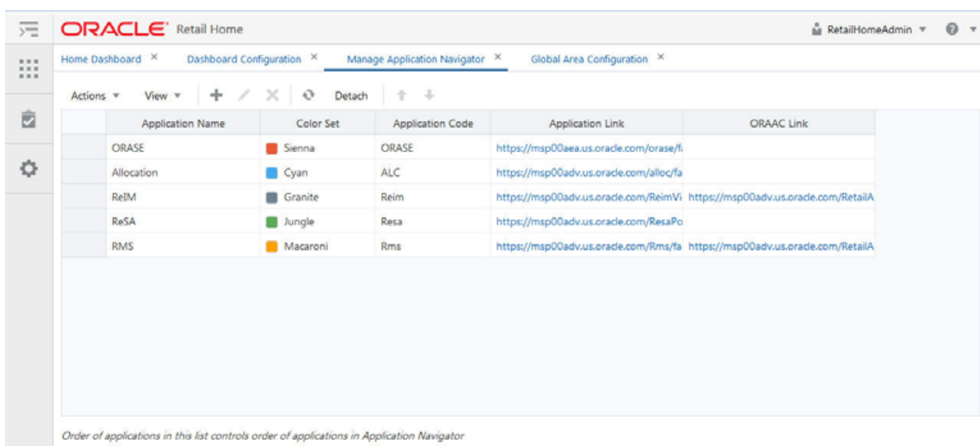
5. To edit an existing Application Info record, click the **Edit** icon in the Application List. The following dialog box is displayed.

Figure 3–3 Edit Application Info



6. Make changes as necessary to any of the fields described in step 3. Click **OK** when finished.
7. To delete an application from the Application List, select the application name and click the **Delete** icon.
8. Use the Up arrow and the Down arrow to change the order of the applications in the Application List.

Figure 3–4 Configured Application Navigator



Role Configuration

This section describes the process for associating enterprise roles with application tiles. Prior to assigning roles, you must first configure the dashboard to display the applications.

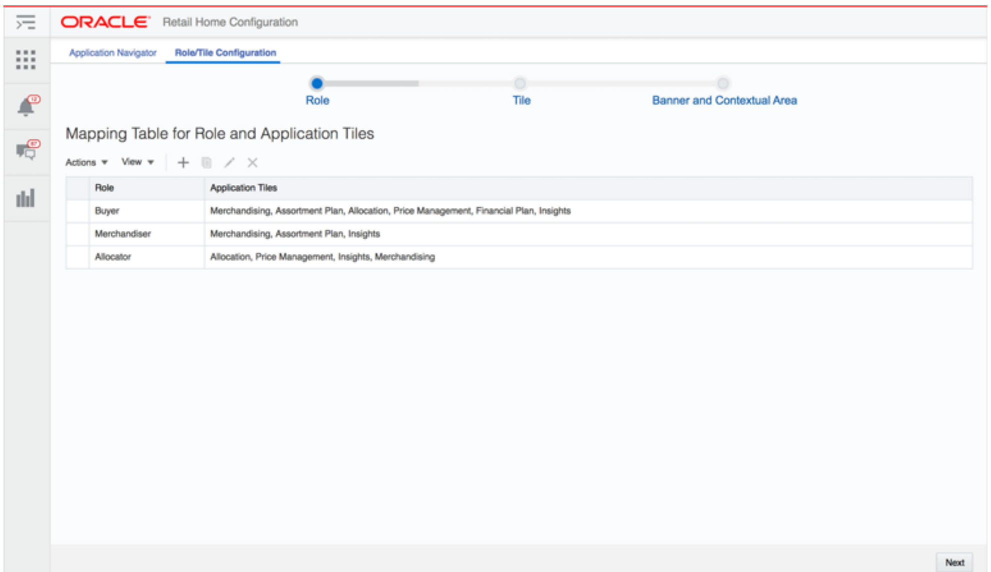
For more information about roles, see *Oracle Retail Advanced Science Cloud Services Implementation Guide* and *Oracle Retail Advanced Science Cloud Services Administration Guide*.

Adding a Role

To add a role, complete the following steps:

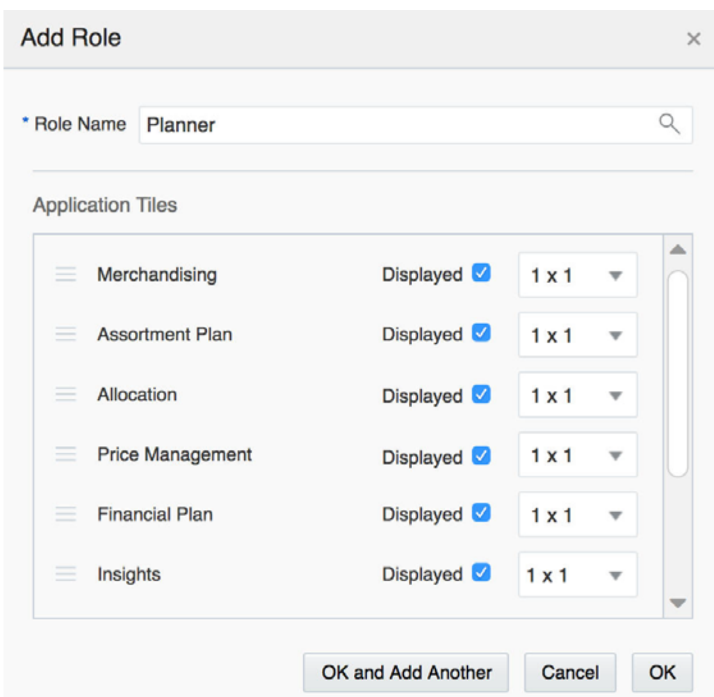
1. From Role/Tile Configuration, select Mapping Table for Role and Application Tiles.

Figure 3–5 Mapping Table for Role and Application Tiles



2. Click the **Add** icon. The Add Role dialog box is displayed.

Figure 3–6 Add Role



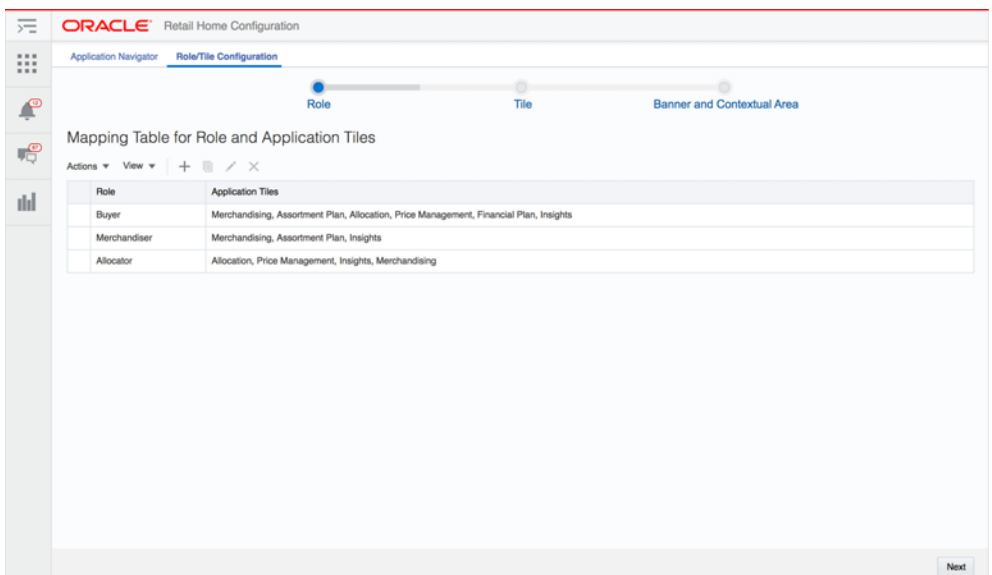
3. Enter text in the Role Name text box to search for a specific role. If the result include more than one role, select the appropriate one.
4. Select the application tile or tiles to associate with the role name you selected in step 2.
5. Select the Displayed check box as appropriate.
6. Select the tile size: 1 x 1 or 2 x 2. These are the only two options available.
7. Click **OK** to save your changes and close the dialog box. Click **OK and Add Another** to save your changes and map roles to applications. Click **Cancel** to close the dialog box without saving your changes.

Duplicating a Role Configuration

To duplicate an existing association between a role and an application, complete the following steps:

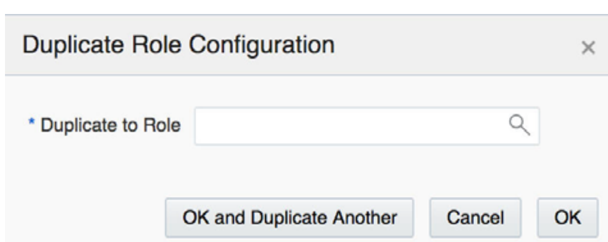
1. From Role/Tile Configuration, select Mapping Table for Role and Application Tiles.

Figure 3–7 Mapping Table for Role and Application Tiles



2. Click the **Duplicate** icon. The Duplicate Role Configuration dialog box is displayed.

Figure 3–8 Duplicate Role Configuration



3. Enter text in the Duplicate to Role text box to search for a specific role. If the result include more than one role, select the appropriate one.
4. Click **OK** to save your changes and close the dialog box. Click **OK and Duplicate Another** to save your changes and add another role. Click **Cancel** to close the dialog box without saving your changes.

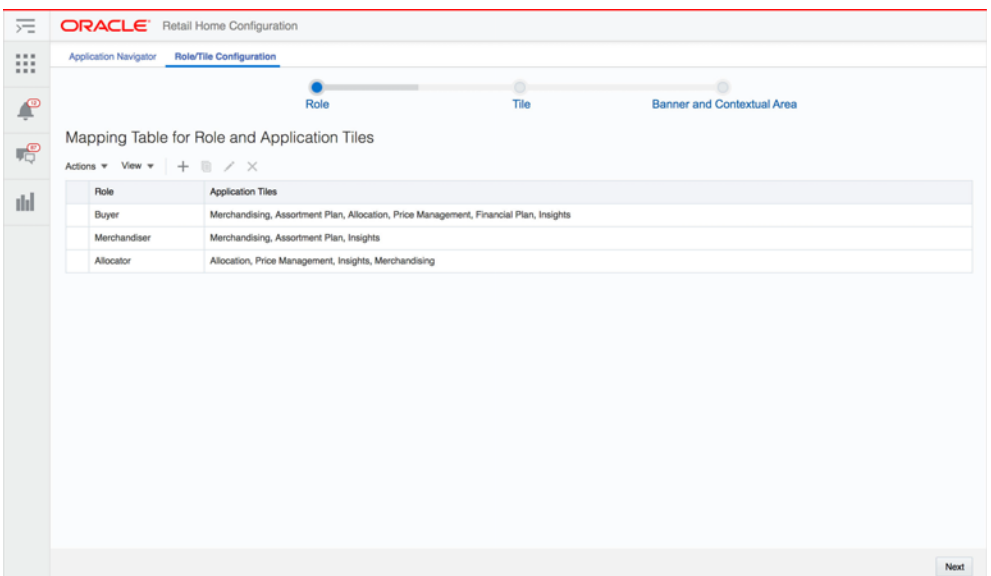
Editing a Role

You can change the order of the application tiles, toggle the display, and adjust the size of a tile.

To edit an existing role, complete the following steps.

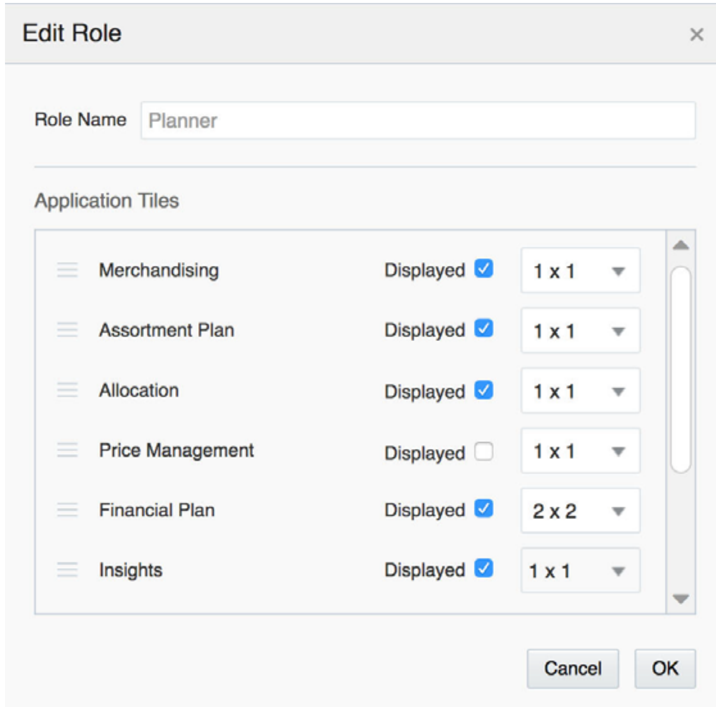
1. From Role/Tile Configuration, select Mapping Table for Role and Application Tiles.

Figure 3–9 Mapping Table for Role and Application Tiles



2. Click the **Edit** icon. The Edit Role dialog box is displayed.

Figure 3–10 Edit Role



3. To change the order of application tiles, drag and drop the icon and click **OK**.
4. To toggle the display of applications, adjust the check marks and click **OK**.
5. To adjust the size of a tile, select an alternative size from the drop-down list and click **OK**.

Deleting a Role

You can delete a role association record along with its associated tile and contextual details.

To delete a role, select that role and click **OK**.

Figure 3–11 Delete Role Confirmation

Tile Configuration

Retail Home displays application tiles within the dashboard. You can configure application tile states and the data sources used for the metrics displayed in the tiles.

Buyer Role, Merchandising Tile States, shown in Figure 3–12, contains the following fields.

- Displayed. A check box that toggles between two states, displayed and not displayed.

  Tile State Report. This field is mandatory and is used to indicate the report that is displayed in the tile state.

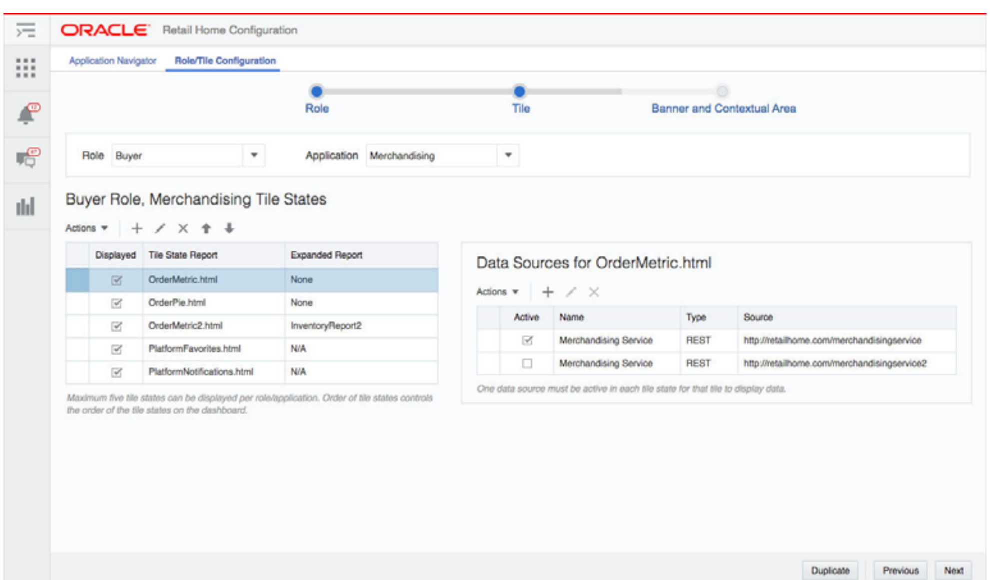
  The default report names that come with Retail Home include Company Website, Insights: Sales vs. Returns, Insights: Returns, Insights: Purchase/Returns, Assortment Plan: Pending Orders, Customer: Loyalty Planned vs. Actual Sales, Financial Planning: Plan vs. Last Year Values, Price Management: Total Markdowns (Regular, Clearance, and Promotions), Science: Activity, Science: Trending, Science: Sentiment, Allocation: Incoming Order Status, Allocation: Planned vs. Actual, Merchandise: Order Quantities, Merchandise: On Order vs. Pending Approval, Favorites, Notification.
- Expanded Report. This field is optional. Values include None (default).
- Active. A check box that toggles between two states, active and inactive. Only one data source for a tile state can be active at a time.
- Name. The name of the data source.
- Type. The data type, either REST or FILE.
- Source. The URL for the source of the data.

Adding a Tile State

To add a tile state, complete the following steps:

1. From Role/Tile Configuration, select a combination of role and application.

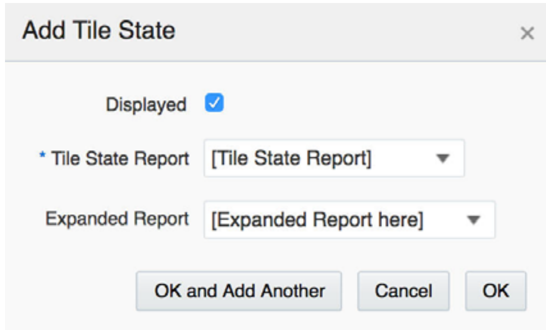
Figure 3–12 Buyer Role, Merchandising Tile States



2. Select a combination of role and application from the drop-down list.

   Note that only five tile states can be displayed for a given role/application.
3. Click the **Add** icon. The Add Tile State dialog box is displayed.

Figure 3–13 Add Tile State

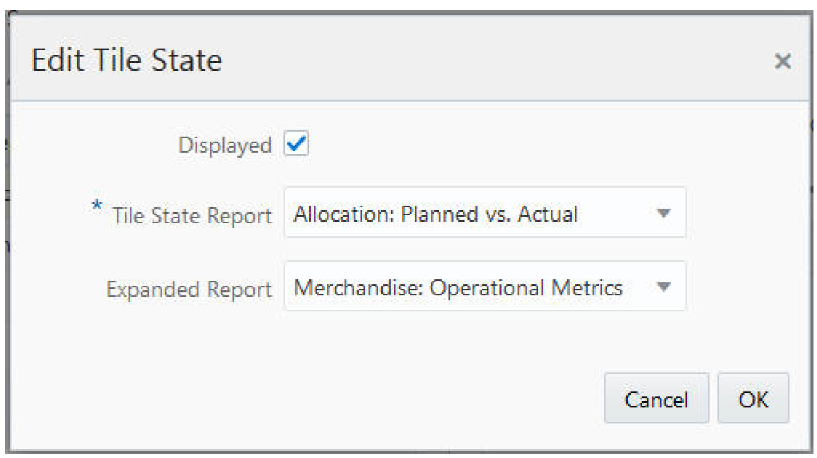


4. Select the Displayed check box to toggle to the displayed state.
5. Select the Tile State Report from the drop-down list.
6. Select the Expanded Report from the drop-down list.
7. Click **OK** to save your changes and close the dialog box. Click **OK and Duplicate Another** to save your changes and add another tile state. Click **Cancel** to close the dialog box without saving your changes.

Editing a Tile State

To edit the tile state, make the necessary changes to the dialog box shown in Figure 3–14, and click **OK**.

Figure 3–14 Edit Tile State



Deleting a Tile State

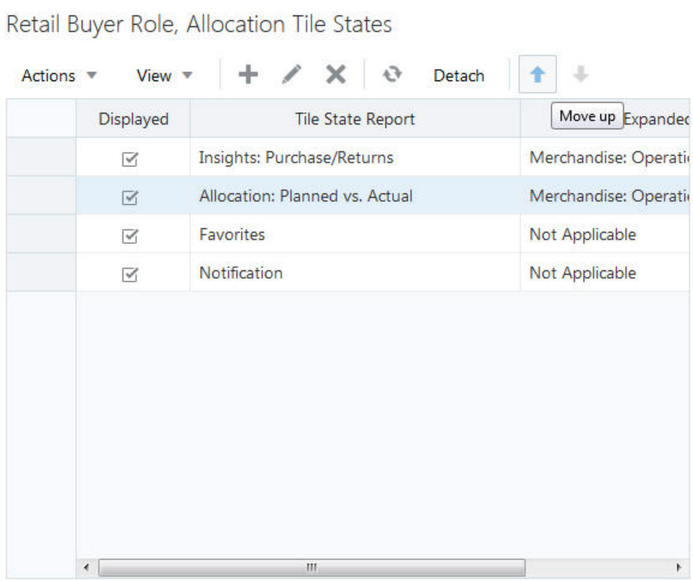
To delete a tile state and its associated data sources, select the one you want to delete and click **OK**.

Figure 3–15 Delete Tile State

Moving a Tile State

To move a tile state within the list, highlight the tile state you want and use the Up arrow and the Down arrow to adjust the position as required.

Figure 3–16 Move Tile State

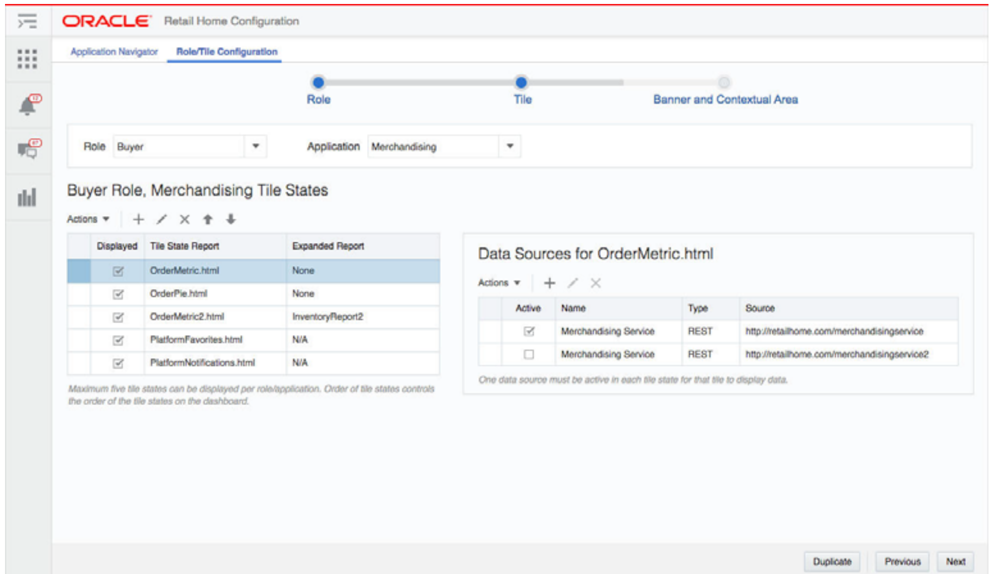


Adding a Data Source

To add a data source, complete the following steps:

1. From Role/Tile Configuration, select a combination of role and application.

Figure 3–17 Adding Data Source



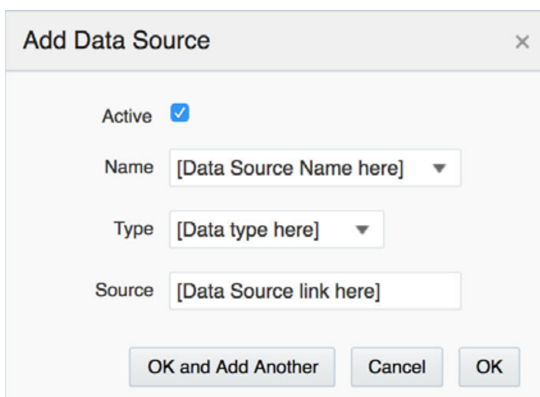
2. Select a combination of role and application from the drop-down menus.

   Note that only five tile states can be displayed for a given role/application.

3. Select the Tile State Report that you want to add a data source for.

4. Under Data Sources for <name of Tile State Report>, click the **Add** icon.

Figure 3–18 Add Data Source



5. Select the Active check box to toggle to the active state.

   If another data source is active, you will be asked to change the active data source. Click **OK** to make the new data source active.

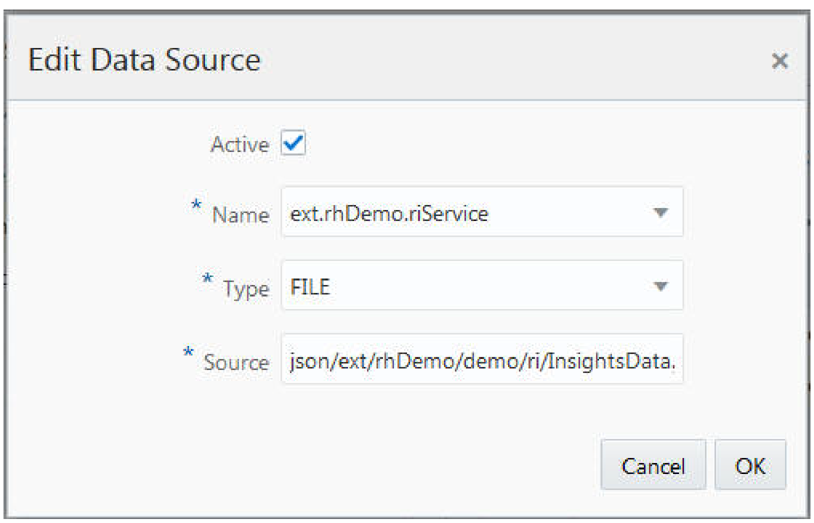
Figure 3–19 Change Active Data Source

6. Select the Data Source Name from the drop-down list.
7. Select the Data Type from the drop-down list.
8. Enter a valid URL for the data source. Note that the URL will be validated and you will receive an error message if the URL is not valid.
9. Click **OK** to save your changes and close the dialog box. Click **OK and Duplicate Another** to save your changes and add another data source. Click **Cancel** to close the dialog box without saving your changes.

Editing a Data Source

To edit the data source, make the necessary changes to the fields shown in Figure 3–20 and click **OK**.

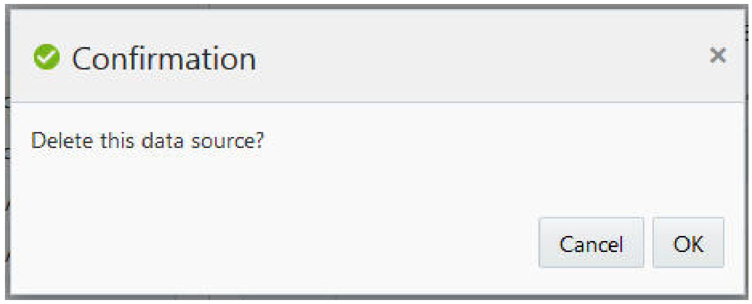
Figure 3–20 Edit Data Source



Deleting a Data Source

To delete a data source, select the one you want to delete and click **OK**.

Figure 3–21 Delete Data Source Confirmation

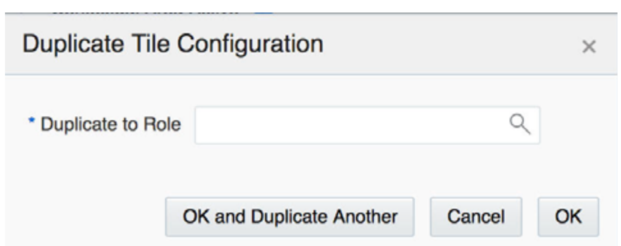


Duplicating a Tile Configuration

You can duplicate all of the tile states and data sources from the displayed role/application intersection to another role.

Click **OK** to duplicate the tile configuration. Click **OK and Duplicate Another** to duplicate more than one tile configuration.

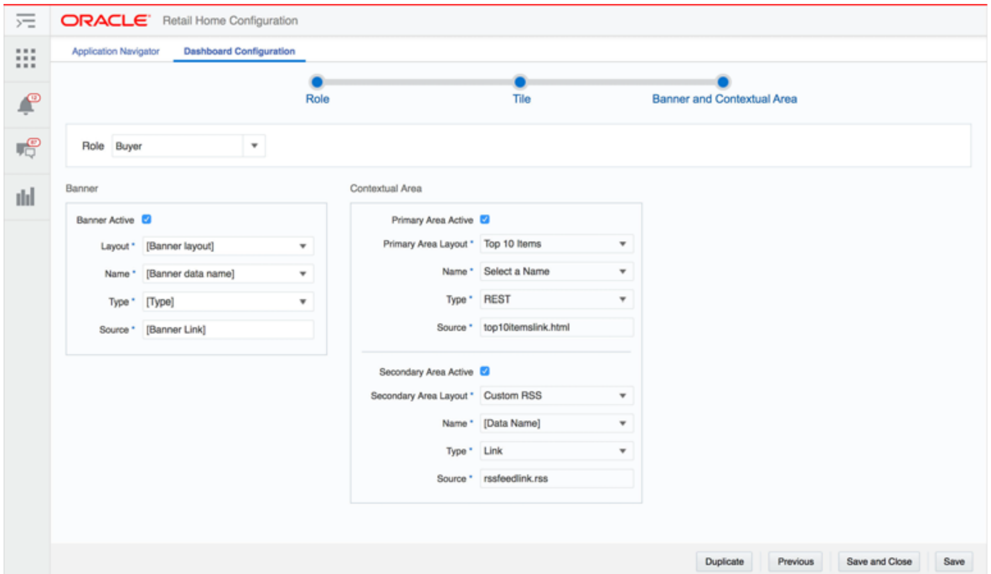
Figure 3–22 Duplicate Tile Configuration



Banner and Contextual Area Configuration

You can configure Retail Home to display reports and metrics in the contextual report and banner area of the dashboard.

Figure 3–23 Banner and Contextual Area

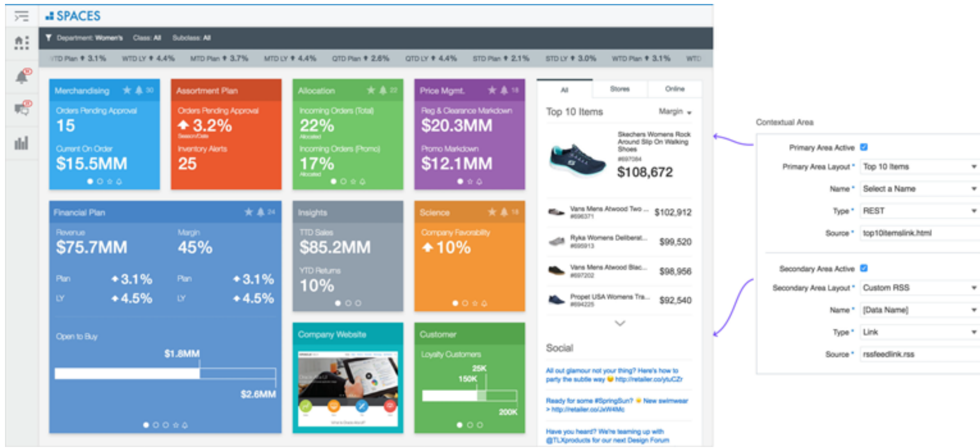


To configure the reports and metrics, complete the following steps:

1. From Dashboard Configuration, select Banner and Contextual Area.
2. Select a role from the Role drop-down list.
3. Select the Banner Active check box. This determines whether or not the banner is displayed on the dashboard. If the banner is active, you must provide a value for the following:
   - Select a layout from the Layout drop-down list.
   - Select a banner name from the Banner data name drop-down list.
   - Select a data source type from the Type drop-down list.
   - Enter a valid data source URL into the Source text box. The URL will be validated.
4. To configure the Contextual Area, select the check box to make the Primary Area active or the Secondary Area active. If you make both areas active, then both will be displayed on the dashboard. If you do not want to display the Contextual Area, then do no make either area active.

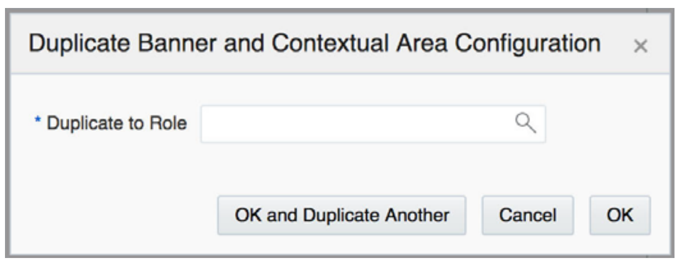
   For whichever area(s) you have designated (Primary and/or Secondary) as active, provide values for the following:
   - Select a layout from the Layout drop-down list
   - Select a name for the area from the Name drop-down list.
   - Select a type (FILE or REST) from the Type drop-down list.
   - Enter a valid data source URL into the Source text box. The URL will be validated.

Figure 3–24 Example Configured Banner and Contextual Area



5. Click **Duplicate** to duplicate the configuration to another role.

Figure 3–25 Duplicate Banner and Contextual Area Configuration



Enter the role to use for the duplicate. Click **OK** to save your changes and exit the dialog box. Click **OK and Duplicate Another** to repeat the process with another role.

6. Click **Save** to save your work and continue. Click **Save and Close** to save your work and close the tab.

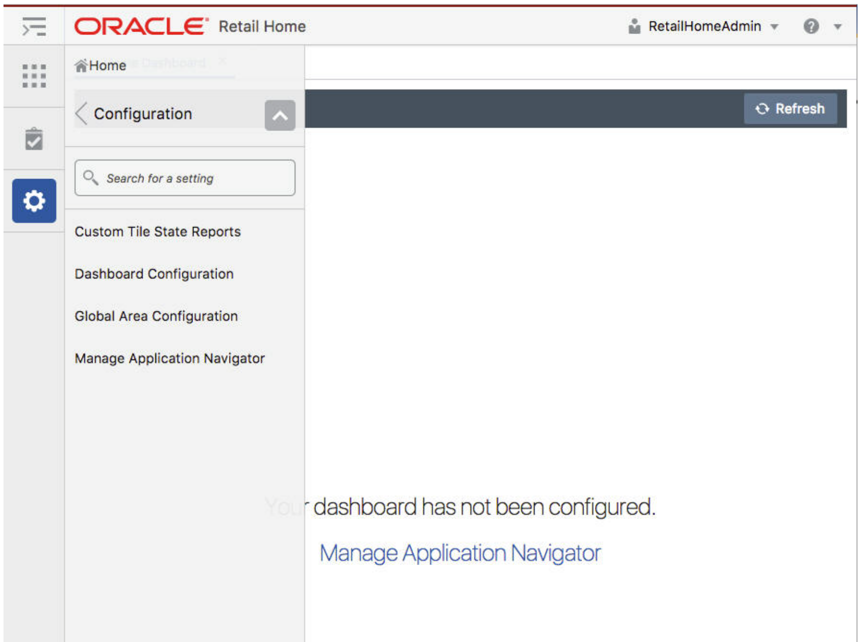
Custom Tile State Reports Configuration

This section describes the process for creating custom tile state reports from a tile state report template.

To access the Custom Tile State Reports page, complete the following steps:

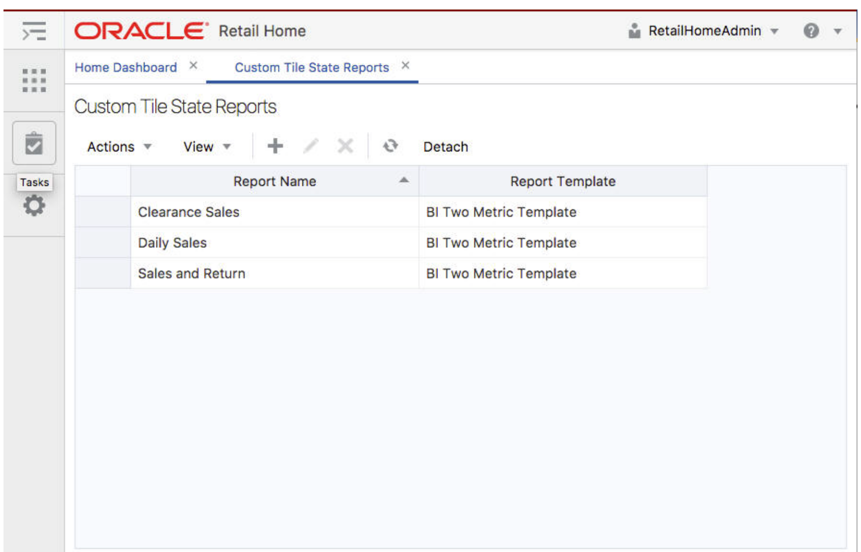
1. Open the Settings navigation menu.
2. Select **Configuration**.

Figure 3–26 Configuration



3. Select **Custom Tile State Reports**, shown in Figure 3–27, which displays a table listing all the custom tile state reports that have been added and a toolbar that is used to add, edit, and delete custom tile state reports.

Figure 3–27 Custom Tile State Reports

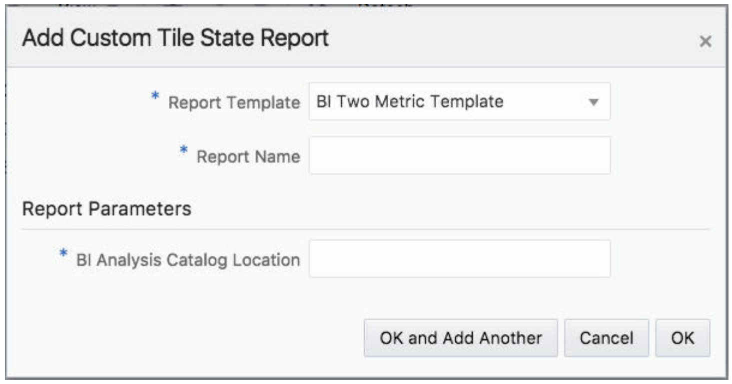


Adding a Custom Tile State Report

To add a custom tile state report, complete the following steps:

1. Click **Add** to open the Add Custom Tile State Report dialog.

Figure 3–28 Add Custom Tile State Report



2. Select a template from the Report Template drop-down list. Note that the Report Parameters section of the dialog will update dynamically, depending on the selected template since each template defines its own set of report parameters.
3. Enter a name in the Report Name field. This name is used to identify the report in the Tile Configuration screen on the Dashboard Configuration page.
4. Complete the Report Parameters section. See the documentation for each Report Template for an explanation of the template's Report Parameter fields and expected values.
5. Click **OK** to add the custom tile state report or **OK and Add Another** to add the custom tile state report and then add another.

Configuring BI Two Metric Template

Tile state reports created from the BI Two Metric Template render the common Two Metric Template tile state layout with data coming from an OBIEE analysis.

Note: Retail Home must be installed with BI Integration enabled for this functionality to work properly.

The following tile state uses the Two Metric Template tile state layout:

Figure 3–29 Tile State Example

Each metric has a label, value, and optional description. In the above tile state example, the first metric's label is Daily Sales Retail, its value is 5,837K, and its description is USD.

The BI Two Metric Template has the following report parameter configuration:

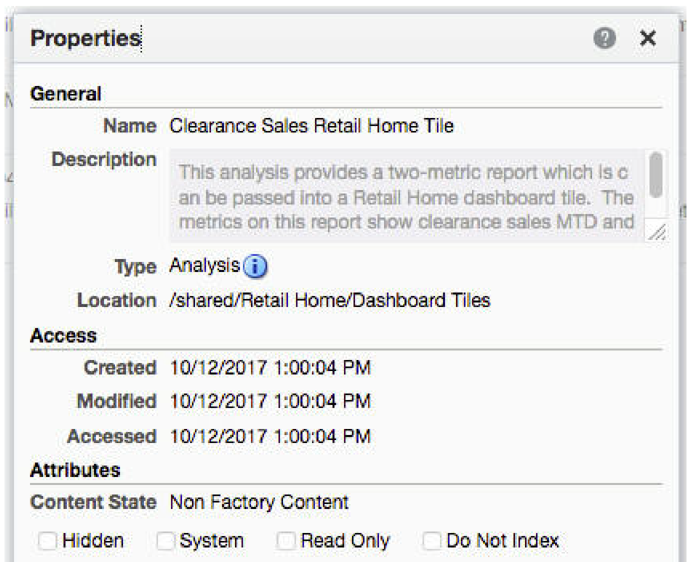
BI Analysis Catalog Path

The path to an analysis within OBIEE.

The analysis path is a combination of the analysis's Location and Name, as found in the analysis's Properties within OBIEE.

Example: /shared/Retail Home/Dashboard Tiles/Clearance Sales Retail Home Tile

Figure 3–30 Clearance Sales Retail Home Tile



In the above example, the analysis's Location is "/shared/Retail Home/Dashboard Tiles" and the analysis's Name is "Clearance Sales Retail Home Tile." The full "BI Analysis Catalog Path" is formed by joining the Location and Name with a "/".

The structure of the OBIEE analysis must match the documented format discussed in this section.

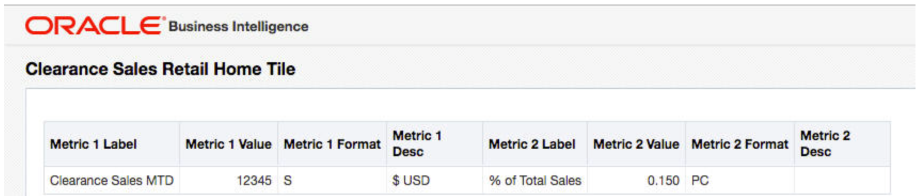
The analysis must have the following columns, in this specified order:

1. Metric 1 Label - Required label for the first metric. Displayed above the metric value.
2. Metric 1 Value - Required first metric value.
3. Metric 1 Format - Optional formatting code for the first metric. See discussion below for valid formatting values.
4. Metric 1 Desc - Optional description (e.g. currency code) to display below the first metric value.
5. Metric 2 Label - Required label for the second metric. Displayed above the metric value.
6. Metric 2 Value - Required second metric value.
7. Metric 2 Format - Optional formatting code for the second metric. See discussion below for valid formatting values.
8. Metric 2 Desc - Optional description (e.g. currency code) to display below the second metric value.

Note that this template requires data for at least one metric and can display up to two metrics.

The structure of the following example analysis in OBIEE is compatible with Retail Home's BI Two Metric Template.

Figure 3–31 Example Analysis in OBIEE



The following table lists the supported formatting codes that Retail Home uses to format numeric values.

Table 3–1 Supported Formatting Codes

Code	Description	Format Example
N	Number	1,234,567.89
S	Short Number	1.2B, 3.1M, 9.95K
PC	Percent	4.5%

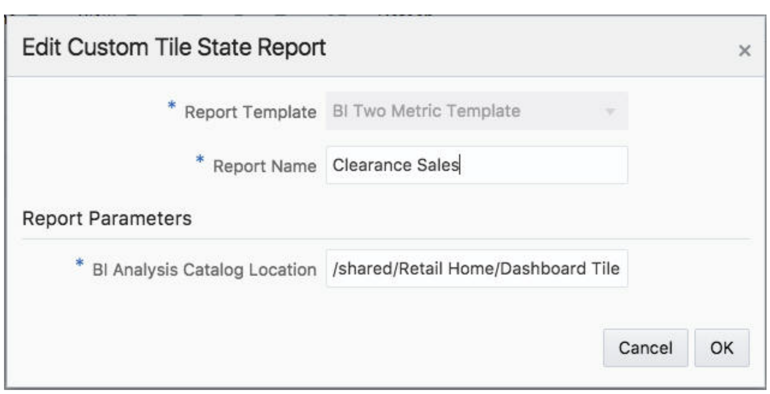
No data source is required when adding tile state reports created with the BI Two Metric Template, since Retail Home can determine the data source from the information provided during installation; however, for more fine-grained control, configure a data source for each report created from the BI Two Metric Template. The reports use the RetailHomeBIService data source.

Editing a Custom Tile State Report

To edit a custom tile state report, complete the following steps:

1. Select the tile state report that you want to edit in the table.
2. Click **Edit**. You see Edit Custom Tile State Report.

Figure 3–32 Edit Custom Tile State Report



3. Make edits to the fields that you wish to change. Note that you cannot change the Report Template of a custom tile state report once the report has been added. You

must either add a new custom report tile state report or delete your existing custom tile state report and then add a new one.

Deleting a Custom Tile State Report

To delete a custom tile state report, complete the following steps:

1. Select the tile state report that you want to delete in the table.
2. Click **Delete** in the table toolbar. You see a confirmation.
3. Click **OK** to delete the custom tile state report. Otherwise, click **Cancel**.

Adding a Custom Tile State Report to a Tile State

All custom tile state reports added on the Custom Tile State Reports page are available to add to a tile on the Tile Configuration screen on the Dashboard Configuration page. You can find each custom tile state report by looking for its Report Name that was entered on the Custom Tile State Reports page.

Note that each custom report is further marked as a custom report on the Tile Configuration screen with the word "Custom" appended to the custom report name.

Figure 3–33 Custom Tile State Report