Oracle® Retail Pricing

Reports User Guide

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Oracle® Retail Pricing Reports User Guide, Release 16.0.024

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Oracle Retail Pricing Reports User Guide, Release 16.0.024.

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Preface

The *Oracle Retail Pricing Reports User Guide* describes the reports available through the Oracle Retail Pricing module functions.

Audience

This Reports User Guide is for users and administrators of the Oracle Retail Pricing module. This includes merchandisers, buyers, business analysts, and administrative personnel.

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- Product version and program/module name
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- Detailed step-by-step instructions to re-create
- Exact error message received
- Window shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 16.0) or a later patch release (for example, 16.0.024). If you are installing the base release and additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times not be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

`http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html`

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is available on the following web site:

`http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html`

(Data Model documents are not available through Oracle Technology Network. You can obtain them through My Oracle Support.)

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.

Convention	Meaning
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the window, or text that you enter.

1 Operational Insights Reports

The Oracle Retail Pricing module has two types of Operational Insights (OI) reports, Dashboard and In-context.

Dashboard reports are role-based and usually the first screen displayed to you upon opening the application; intended to highlight actionable or frequently monitored activity. Actions taken from dashboard reports generally launch into a solution's screen passing parameters in a specific format. The dashboards are specific to various roles such as the Pricing Analyst, and contain role specific reports. These Dashboards highlight the areas of focus for a user and help to prioritize work for the day.

In-context reports are displayed in the selected Pricing windows and allow for an extension of information available in the associated screen to provide further details about an entity that is not present on the screen. It dynamically refreshes when certain actions (called contextual events) are performed on the task flow.

Users can configure dashboard reports by defining various parameters such as threshold values, default options, department level exceptions and so on. These values are defined during installation and can be modified later.

The Pricing OI reports are as follows:

- Pricing Analyst Dashboard
  - Clearances Pending Approval Report
  - Price Pending Approval Report
- In-context Reports
  - Inventory Summary Report
  - Price Summary Report

Filtering Dashboard Reports

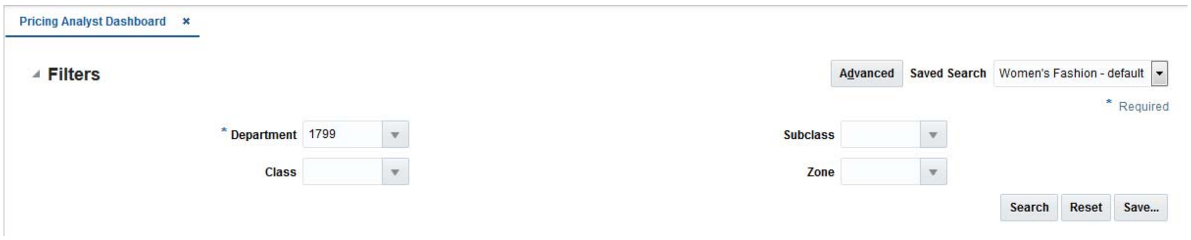
You can use the dashboard level filter criteria to filter the reports by entering, selecting, or searching the criteria present in the Pricing module. For example, you can filter the Pricing Analyst dashboard reports by providing specific values in the Filters section. The criteria can be provided either in Basic or Advanced mode, depending on the requirement. Basic is the default mode when the dashboard is entered. Click **Advanced** to access the filters panel in advanced mode and allow for additional criteria to be selected, as well. You can return to Basic mode by clicking **Basic**.

Filtering Dashboard Reports Through the Basic Search Criteria

To filter the dashboard reports through the basic search criteria:

1. Enter, select or search the default filters in the filter pane in basic mode.

Figure 1–1 Filters Section in Basic Search Criteria



2. You can also click on the Saved Search drop down to select one of the saved sets of filter criteria. Selecting a saved search will populate the filter criteria section with saved filter criteria. If the saved search is selected to run automatically then the search will be executed too. You can also choose to manage and personalize the saved searches by clicking Personalize in the list. The Personalize Saved Searches window appears. For more information on the Personalize Saved Searches, see the section Personalize Saved Search.
3. Click **Search**. The data that matches the filter criteria is displayed in the dashboard reports.
4. Click **Reset** to remove the specified filter criteria.
5. Click the **Save..** button to save the current set of filter criteria as a Saved Search. The Create Saved Search window appears. For information on the Create Saved Search window, see the section Create Saved Search.

Filtering Dashboard Reports Through the Advanced Search Criteria

To filter the dashboard reports through the advanced search criteria:

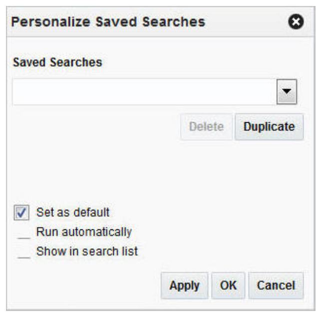
1. Enter, select or search the filter criteria in the advanced filter pane.
2. You can also click on the Saved Search drop down to select one of the saved sets of filter criteria. Selecting a saved search will populate the filter criteria section with saved filter criteria. If the saved search is selected to run automatically then the search will be executed too. You can also choose to manage and personalize the saved searches by clicking Personalize in the list. The Personalize Saved Searches window appears. For more information on the Personalize Saved Searches, see the section Personalize Saved Search.
3. Click **Search**. The data that matches the filter criteria is displayed in the dashboard reports.
4. Click **Reset** to remove the specified filter criteria.
5. Click the **Save..** button to save the current set of search filter criteria as a Saved Search. The Create Saved Search window appears. For information on the Create Saved Search window, see the section Create Saved Search.
6. Click **Add Fields** to add more filter criteria. To remove the field from the filter, click the x right next to the field.
7. Click **Reorder** to change the order of the available fields. The Reorder Search Fields window appears.

- Select the desired field and use the up and down arrows to rearrange the order of the fields.
- Click **OK** to confirm the new order of the fields and close the window.
- Click **Cancel** to reject any changes and close the window.

Personalize Saved Search

Select Personalize from the **Saved Search** list to view the personalized saved search. The Personalize Saved Searches pop up allows you to edit, copy, or delete saved search criteria set.

Figure 1–2 Personalize Saved Searches Window



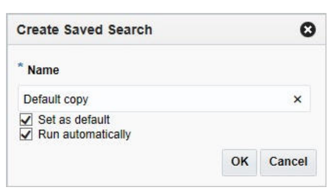
Create Saved Search

You can create a Saved Search by clicking the **Save..** button in the Search Criteria panel after you have entered the criteria for your search. The **Save** button will call up the Create Saved Search window where the search is given a name and the user determines whether it should be the default search as well as whether it should be run automatically.

To view the created saved search:

1. Click the **Save..** button. The Create Saved Search window appears.

Figure 1–3 Create Saved Search Window



2. Enter the name of the search.
3. You can also choose to save the combination of the search criteria by selecting the following check boxes:
   - Set as default
   - Run automatically

Pricing Analyst Dashboard

This dashboard is intended to be used by a Pricing Analyst. The Pricing Analyst determines the pricing strategy for an area of the business, by combining objectives, such as increase revenues, increase profits, decrease inventory, with historical and predictive analytics data.

The Pricing Analyst reviews analytical data to determine past trends and predict future trends in order to determine the best way to meet the department pricing objectives. The analyst creates regular and clearance price changes, as well as department specific promotions. The decisions made by the Pricing Analyst require approval by the Pricing Manager.

The following reports are displayed in this dashboard:

- Clearances Pending Approval
- Price Changes Pending Approval

There is one tile displayed for each report. The color of the tiles will be green, yellow or red, based on the criticality of the data depicted in the report. The criticality parameters can be defined by the user at the system option level.

The filters for this dashboard are:

- Basic Filters
  - Department (mandatory)
  - Class
  - Subclass
  - Zone
- Advanced Filters
  - Channel
  - Location
  - Supplier Site

Viewing Pricing Analyst Dashboard

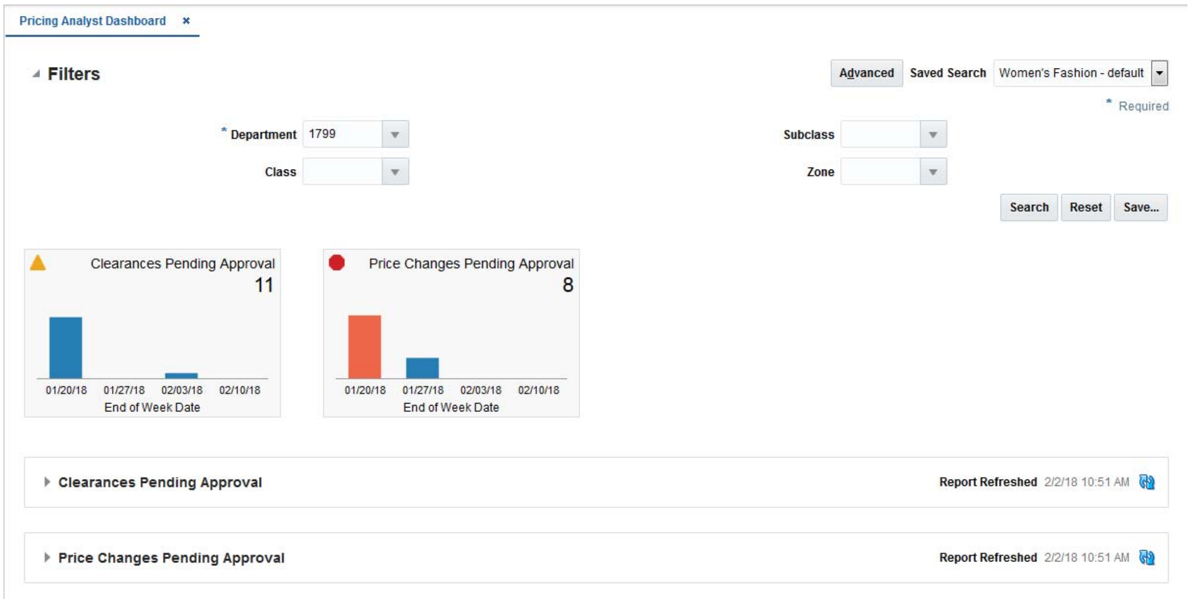
To view the Pricing Analyst dashboard:

1. From the Tasks menu select **Reports** > **Pricing Analyst Dashboard**. The dashboard window appears.

   Note: For users holding the Pricing Analyst role, the dashboard opens automatically when Oracle Retail Pricing module is started.

2. The Pricing Analyst Dashboard contains the following reports.

Figure 1–4 Pricing Analyst Dashboard



Clearances Pending Approval

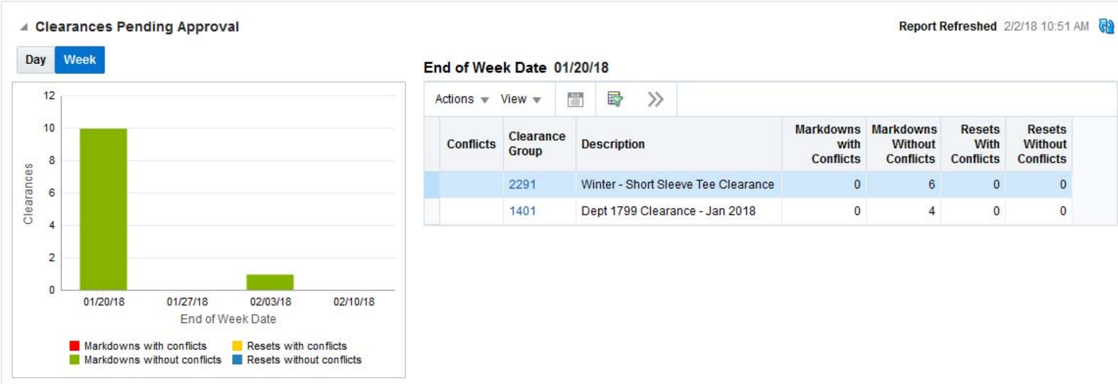
The Clearances Pending Approval report highlights the clearance markdowns and clearance resets that are scheduled to be effective in the next seven days in the 'Day' view and the next four weeks in the 'Week' view and are pending approval. This includes clearances in Worksheet, Submitted and Rejected status. For each day or week, there could possibly be four types of clearances shown in the stacked bar chart, representing:

- Markdowns with conflicts
- Markdowns without conflicts
- Resets with conflicts
- Resets without conflicts

This report is displayed in the Pricing Analyst dashboard and gives users, holding the pricing analyst role, visibility to view and take actions on clearance markdowns and resets that are close to the effective date and pending approval. The report consists of a Headline Tile at the dashboard level, a Column Chart and a Contextual table. Multiple information points provided in the report enables the user to prioritize clearance markdowns and resets to take action on, by navigating to the Clearance Group screen. There will be special emphasis on those clearance markdowns that may already be overdue getting to the store or other selling channels or have issues that require conflict resolution.

The table shows the Effective or End of Week Date as well as the Clearance Group, a description of the group, and the number of markdowns and resets with and without conflicts.

Figure 1–5 Clearances Pending Approval



Price Changes Pending Approval

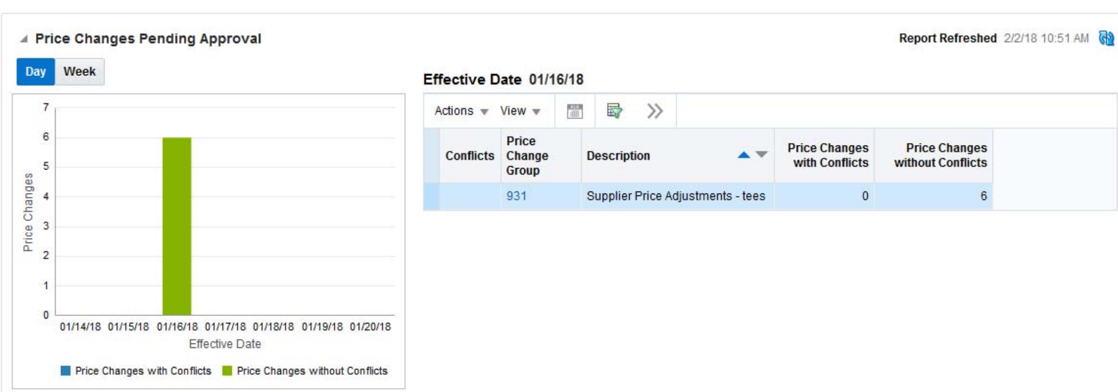
The Price Changes Pending Approval report highlights the price changes that are scheduled to be effective in the next seven days in the 'Day' view and the next four weeks in the 'Week' view and are pending approval. This includes price changes in Worksheet, Submitted and Rejected status. For each day or week, there could possibly be two types of price changes shown in the stacked bar chart, representing:

- Price Changes with Conflicts
- Price Changes without Conflicts

This report is displayed in the Pricing Analyst dashboard and gives users, holding the pricing analyst role, visibility to view and take actions on price changes that are close to the effective date and pending approval. The report consists of a Headline Tile at the dashboard level, a Column Chart and a Contextual table. Multiple information points provided in the report enables the user to prioritize price changes to take action on, by navigating to the Price Change Group screen. There will be special emphasis on those price changes that may already be overdue getting to the store or other selling channels or have issues that require conflict resolution.

The table shows the Effective or End of Week Date as well as the Price Change Group, a description of the group, and the number of price changes with and without conflicts.

Figure 1–6 Price Changes Pending Approval



Pricing In-context Reports

In-context reports are shown in selected Pricing screens in collapsible panels and containers. These reports allow for an extension of information available in the associated screens to provide further details about a transaction or entity that is not present on the screen and dynamically refresh when certain actions (called contextual events) are performed on the task flow.

The Pricing In-context BI reports are as follows:

- Inventory Summary
- Price Summary

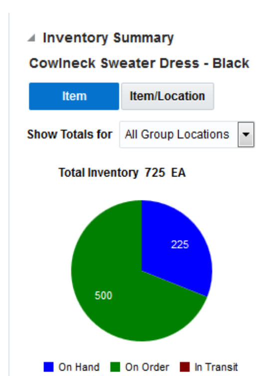
Inventory Summary

The Inventory Summary report is shown in the Price Change Group and the Clearance Group screen. By default, the inventory summary contains the on hand, in transit, and on order for the highlighted item (or item/markdown) and the associated stores/warehouses present in a price change or clearance group.

In the drop down **Show Totals For** you can select the distinct set of locations such as All Group Locations, Stores Only, or Warehouses Only, for which the inventory needs to be displayed.

You can toggle between Item and Item/Location. If you select Item/Location the report displays a summary of the inventory levels for the selected item, or item/markdown at the location highlighted in the Locations table including the total, on hand, in transit and on order inventory. Here, the **Show Total For** drop down defaults based on the record selected in the Locations table in the Price Change Group or Clearance Group screen.

Figure 1–7 Inventory Summary



Price Summary

This report provides information about the highlighted item/location in a price change group or clearance group about the current price and cost of the item/location, including the current price, whether it is on clearance, margin, and the next approved price change or markdown event. This can help the pricing analyst or manager to validate that the price event has been created correctly before approving.

If the item is currently on clearance in one or more locations, a clearance tag icon is displayed on the left side of the selling retail value.

Figure 1–8 Price Summary