Oracle® Retail Home

Administration Guide

Release 19.0.001.7

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Oracle Retail Home Administration Guide, Release 19.0.001.7

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Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

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

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

> **Note:** Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the Online Documentation available on the Oracle Technology Network Web site. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: retail-doc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at `http://www.oracle.com`.

Preface

This Operations Guide provides critical information about the processing and operating details of Product, including the following:

- System configuration settings
- Technical architecture
- Functional integration dataflow across the enterprise
- Batch processing

Audience

This guide is for:

- Systems administration and operations personnel
- Systems analysts
- Integrators and implementers
- Business analysts who need information about Product processes and interfaces

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at
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Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit
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http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Retail Home Release 19.0.001.7 documentation set:

- *Oracle Retail Home User Guide*
- *Oracle Retail Home Security Guide*

Customer Support

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
- Screen 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, 3.0) or a later patch release (for example, 3.0.1). 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 Help Center (docs.oracle.com)

Oracle Retail product documentation is also available on the following Web site:

https://docs.oracle.com/en/industries/retail/index.html

(Data Model documents can be obtained through My Oracle Support.)

Conventions

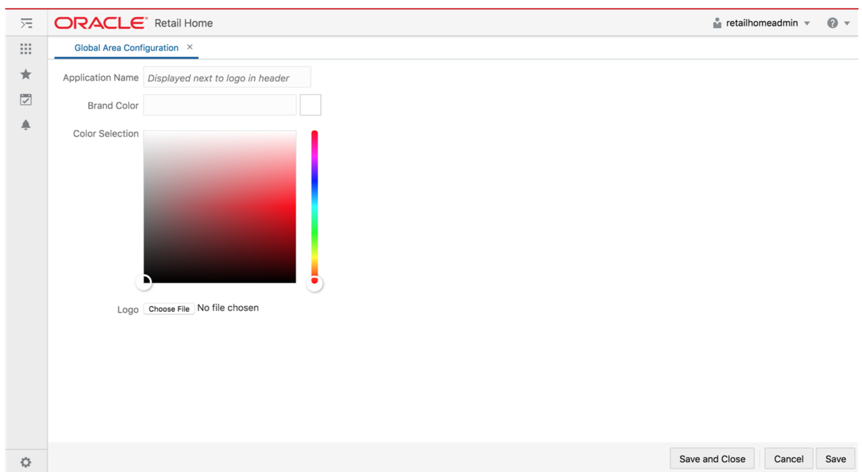
The following text conventions are used in this document:

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

1 Global Area Configuration

The Global Area Configuration page allows an admin user to configure certain components of the branding area including the application name, the color of the activity indicator and the logo.

Figure 1–1 Global Area Configuration



The Global Area Configuration page can be reached through the Settings menu (Settings ' User Interface ' Global Area Configuration).

After making changes on this page click the 'Save' or 'Save and Close' button to apply the new settings.

To revert to the default settings simply remove the custom value and save.

Note: Logos can be any standard web image type including SVG, PNG, etc. and will be scaled to a maximum height of 18 px and a maximum width of 140 px. Logo files are limited to 2 MB in size.

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2 Application Navigator Setup

The Retail Home Application Navigator Setup page gives administrators the ability to configure applications within Retail Home. Retail Home uses these applications to populate its application navigator menu, to define dashboard tiles within Retail Home dashboards and to populate the application navigator menus in other Retail Applications.

Figure 2–1 Retail Home Application Navigator Setup Page

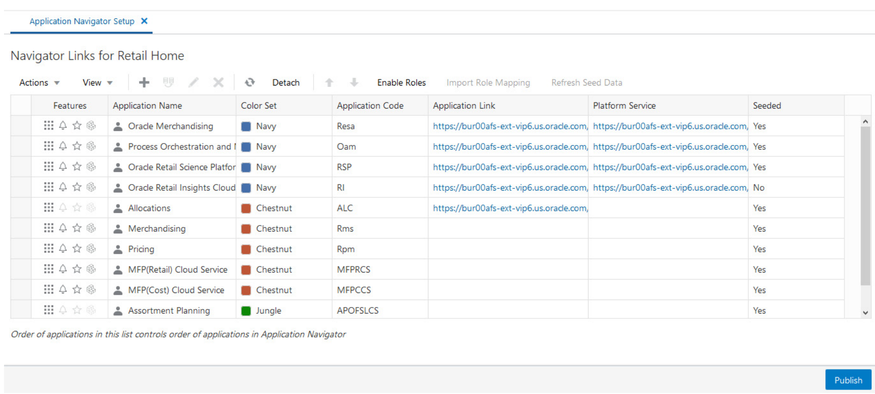


Figure 2–2 Retail Home Application Navigator

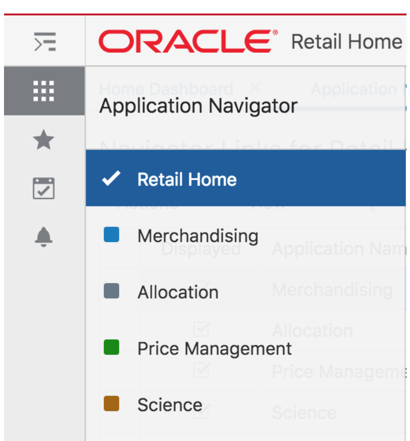
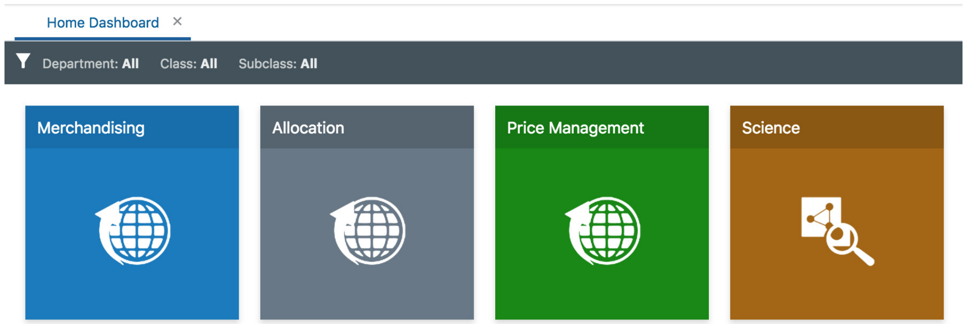


Figure 2–3 Retail Home Dashboard



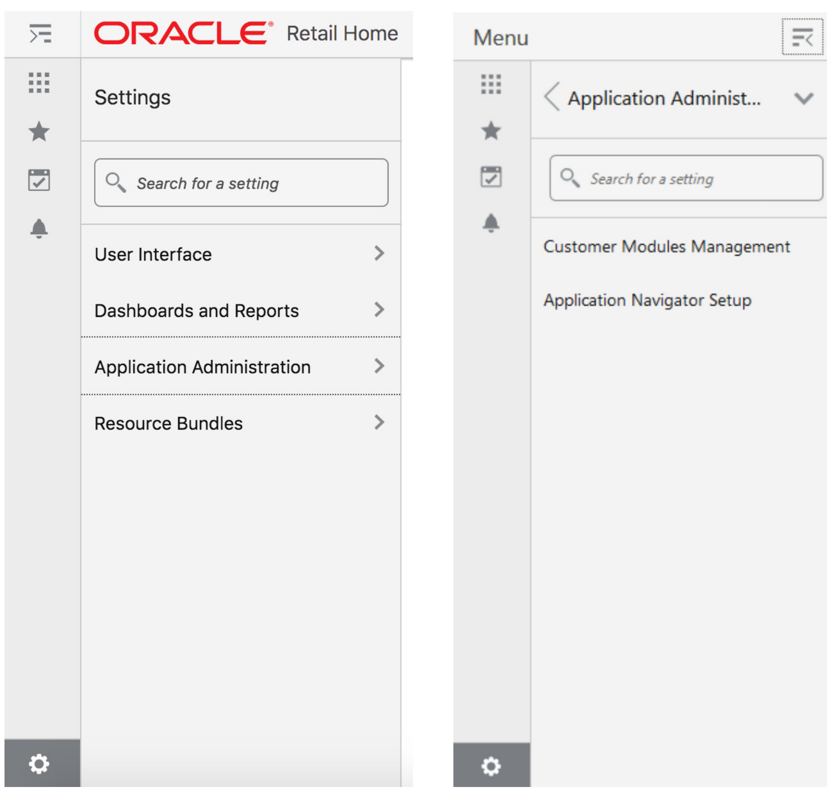
System Generated Application Navigator Entries

Retail Home creates an initial set of application entries for known Retail Applications upon initial installation or upgrade to current version. These entries only contain the name and application code for applications and are initially disabled. On upgrade, the oldest entry for each known application will be flagged instead of inserting a new application (when present).

Launching the Application Navigator Setup Page

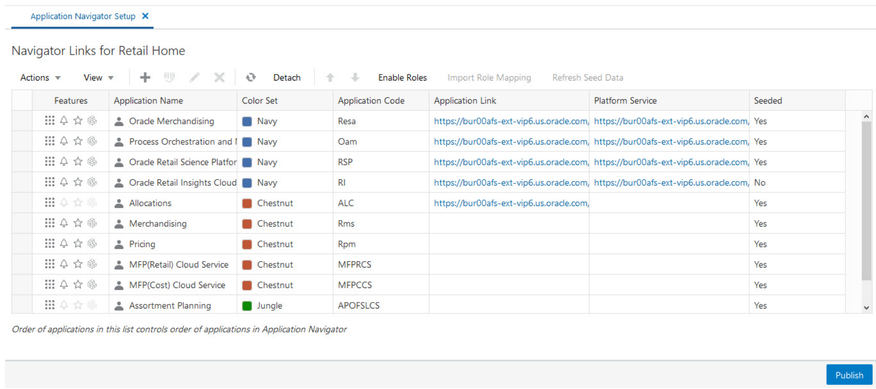
The Application Navigator Setup page can be launched from the Retail Home Settings menu's Application Administration section.

Figure 2–4 Application Navigator Setup Link in Retail Home's Settings Menu



The Application Navigator Setup page shows a table of all the application navigator entries currently configured in Retail Home.

Figure 2–5 Retail Home Application Navigator Setup Page



The following information is shown for each application:

- **Features** - Displays whether these features are enabled or not for this application: Application Navigator, Notifications, Favorites, and Resource Bundle Customizations.
- **Application Name** - The name that will be displayed in Application Navigator menus and in Retail Home Dashboard Tiles.
- **Color Set** - The color scheme used to display this application in the Retail Home Application Navigator menu and in Retail Home Dashboard Tiles.
- **Application Code** - The unique code associated with a Retail Application. This is required to support features such as Favorites, Notifications and Resource Bundle Customization.
- **Application Link** - The URL used to launch the application from Application Navigator menus or from the header of a dashboard tile.
- **Platform Service URL** - The URL used to access Platform ReST Services. This is required to support features such as Favorites, Notifications and Resource Bundle Customization.
- **Seeded** - Shows whether the application was seeded by Retail Home

The table toolbar gives users the ability to add, duplicate, edit, delete, refresh and reorder applications, as well as manage roles associated with each application.

Adding an Application Navigator Entry

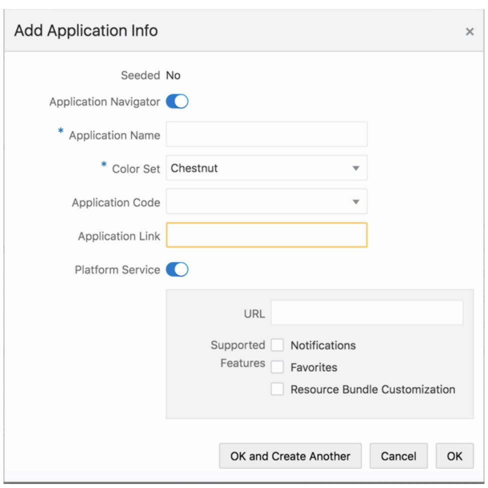
The **Add** icon on the table toolbar allows users to add a new Application Navigator entry in Retail Home.

To add an application navigator entry, users enter the following information in the "Add Application Info" dialog:

- **Seeded** - Shows whether the application is a seeded application or not.
- **Application Navigator Switch** - Controls whether the application will be displayed in the Retail Home Application Navigator menu.

- **Application Name** - A unique name for the application that will be displayed in the Application Navigator menus and in the Retail Home Dashboard Tile header.
- **Color Set** - The color scheme used to display this application in the Retail Home Application Navigator menu and for the background of the Retail Home Dashboard Tile.
- **Application Code** - The unique code associated with a Retail Application. This is required to support features such as Favorites, Notifications and Resource Bundle Customization.
- **Application Link** - The URL used to launch the application from Application Navigator menus or from the header of a dashboard tile.
- **Platform Service Switch** - Controls the display of options under platform services (URL & sup-ported features).
- **Platform Service URL** - The URL used to access Platform ReST Services. This is required to support features such as Favorites, Notifications and Resource Bundle Customization.
- **Platform Service Supported Features** - Check boxes to determine whether Notifications, Favorites & Resource Bundle Customization is available for the application.

Figure 2–6 Add Application Info Dialog



Saving the New Application Navigator Entry

The **OK** and **OK and Create Another** buttons in the "Add Application Info" dialog will save all entered values in the dialog into Retail Home.

Duplicating an Application Navigator Entry

The "Duplicate" icon on the table toolbar allows users to create a new application navigator entry using the selected application navigator entry as a starting point.

Users can modify the details in the “Add Application Info” dialog. See the section above titled Adding an Application Navigator Entry for details about adding a new application navigator entry.

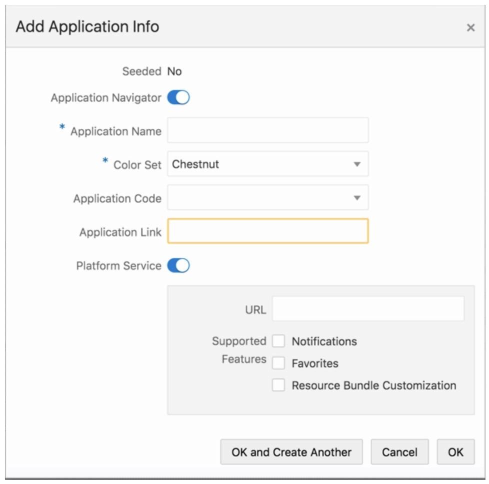
Note: It is allowed to duplicate from an existing seeded entry, but the new application navigator entry will not be considered a seeded entry.

Editing an Application Navigator Entry

The **Edit** icon on the table toolbar allows users to change the details of an existing application navigator entry in Retail Home.

Users can modify the details in the "Edit Application Info" dialog:

Figure 2–7 Edit Application Info Dialog



Deleting an Application Navigator Entry

The "Delete" icon on the table toolbar allows users to delete the selected application navigator entry from Retail Home.

Note: Users cannot delete seeded entries from the Manage Application Navigator page.

Reordering Application Navigator Entries

The order of the application navigator entries in the Manage Application Navigator table is the order that the applications will be displayed in the Application Navigator menus in Retail Home and in other Retail Applications.

The “Move Up” icon and the “Move Down” icon on the table toolbar allow users to move the selected application navigator entry up or down in the table.

Managing Roles

Roles can be associated with each application navigator entry to restrict which users will have access to the application through the application navigator menus outside of Retail Home. Users who do not have access to the application will not see it in the application navigator menus.

Enabling Roles

Roles are disabled by default and all users will see links to all applications in the application navigator menus. Use the **Enable Roles** button in the table toolbar to enable role mappings.

Mapping Roles to Applications

Mapping roles to applications is accomplished through the upload of a CSV formatted file containing a mapping of applications to roles. The CSV file is required to have columns “App Name” and “Role Name”. Any other columns included in the file will be ignored. The “App Name” column should contain the name of the application currently shown in the Application Name column. The keyword “all” may be used in the “App Name” column in place of an application name to map a role to all applications currently in the table. The “Role Name” column should contain a valid enterprise role name.

Importing a Role Mapping

Import the role mapping CSV file using the Import Role Mapping button on the table toolbar. A successful import will replace the role mappings for all applications currently managed in Retail Home.

Seeding Data From Applications

Applications can provide a standard configuration for Retail Home dashboards through platform services. When imported, Retail Home will automatically create any specified dashboards or additional application entries specified in the data.

There are two ways to tell Retail Home to load this data. When a new application is created or a seeded entry updated with platform services enabled, Retail Home will automatically attempt to load seed data. Additionally, the data for an application can be manually updated by pressing the refresh seed data button in the toolbar.

If an application does not provide seed data or has not deployed a supported version of the platform services, no update will occur and the failure will be logged silently. In the case of a manual refresh, an error will be displayed to the user.

Publishing Application Navigator Entries

Application navigator entries can be published to the applications that are associated with a domain. These applications are represented by the system-generated application navigator entries. Data that is published includes the details of each application including links and role mappings. Only applications that have an application link will be published. Use the **Publish** button located in the page footer to publish this data.

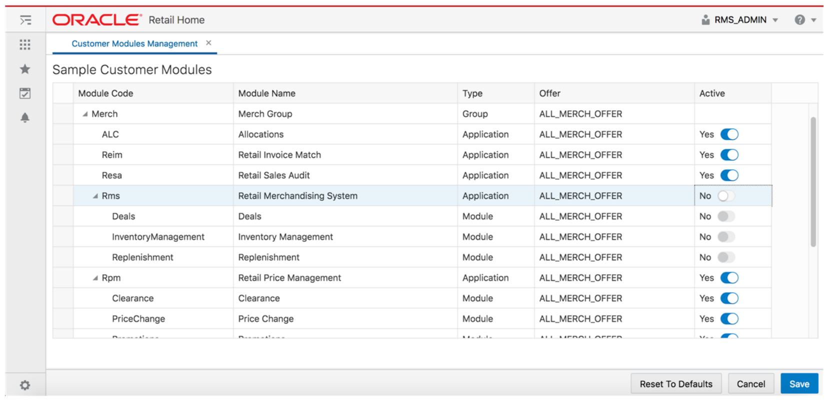
Once the application navigator entries have been published, if further changes are made to the application navigator entries or the role mappings it will be necessary to publish again in order for those changes to be pushed out to the domain applications.

Important Note: If the application navigator entries for an application are currently managed through ORAAC (Oracle Retail Application Admin Console) then this **Publish** action will replace the application navigator entries that were configured through ORAAC.

Customer Modules Management

The Retail Home Customer Modules Management page gives customer administrators the ability to activate or deactivate provisioned applications and modules.

Figure 2–8 Retail Home Customer Modules Management Page



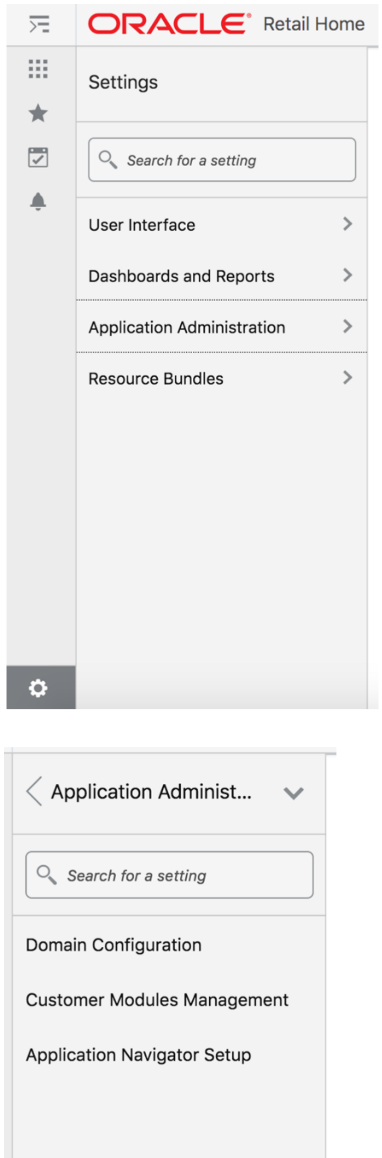
Applications and modules that are deactivated will not be accessible to users. Scheduled batch processes may also be halted when those processes are tied to deactivated applications and modules.

The management of customer modules in Retail Home requires domains to be configured first since information about customer-provisioned applications and modules reside in the domains' Module Definition Framework (MDF) data.

Launching the Customer Modules Management Page

The Customer Modules Management page can be launched from the Retail Home Settings menu's Application Administration section.

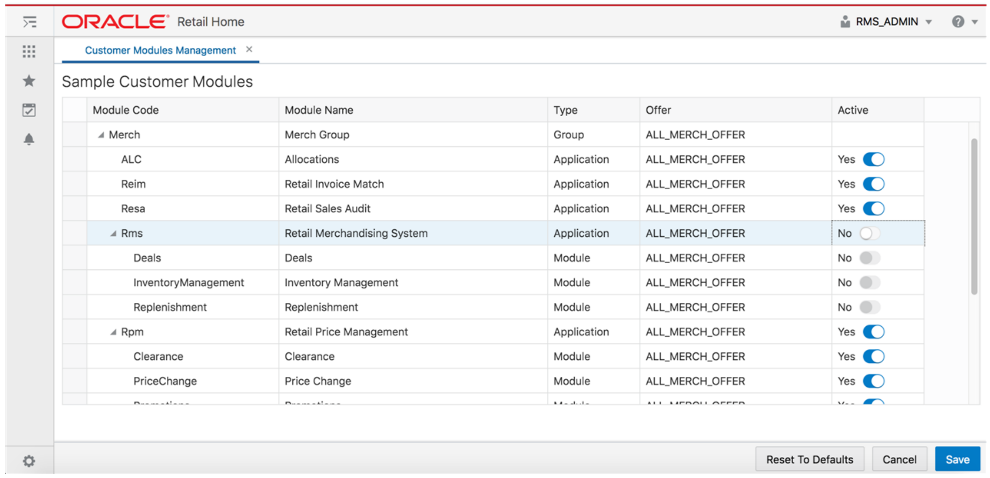
Figure 2–9 Customer Modules Management Link within Retail Home's Settings Menu



The Customer Modules Page displays the customer-provisioned modules in a hierarchical table structure.

Only modules provisioned to the customer are displayed.

Figure 2–10 Retail Home Customer Modules Management Page



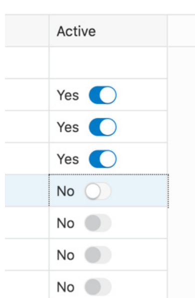
The columns include:

- **Module Code** - A unique identifier for an application or module.
- **Module Name** - The descriptive name of the application or module.
- **Type** - The type of module which can be one of the following:
  - *Application* - A Retail Application
  - *Module* - A feature within the Retail Application or another module.
  - *Group* - A grouping of applications or modules.
- **Offer** - The offer code used to provision the application to the customer.
- **Active** - A flag indicating if the application or module is active or not.

Activating and Deactivating Customer Modules

Customer administrators can activate or deactivate customer-provisioned applications or modules by interacting with the toggles for each row's Active column.

Figure 2–11 Customer Modules Management Page's Toggle components for Active Statuses



Only "Application" or "Module" typed rows can be toggled.

Toggling the active state of an application or module also toggles the state of child modules.

When a parent application or module is deactivated, its child modules will be deactivated and their toggle components will be disabled. Activating the parent, activates the child modules and enables their toggles.

Saving or Discarding Customer Module Changes

Changes to the activation states are not persistent until the user clicks on the page's **Save** button.

Figure 2–12 Customer Modules Management page's Cancel and Save Buttons

Once the changes are saved:

- Deactivated applications and modules will cause applications and features to be inaccessible to users. Scheduled batch processes may also be halted when those processes are tied to deactivated applications and modules.
- The association of applications to domains is recalculated.

The page's "Cancel" button discards all changes made to the applications and modules.

Resetting Activation Status to Default

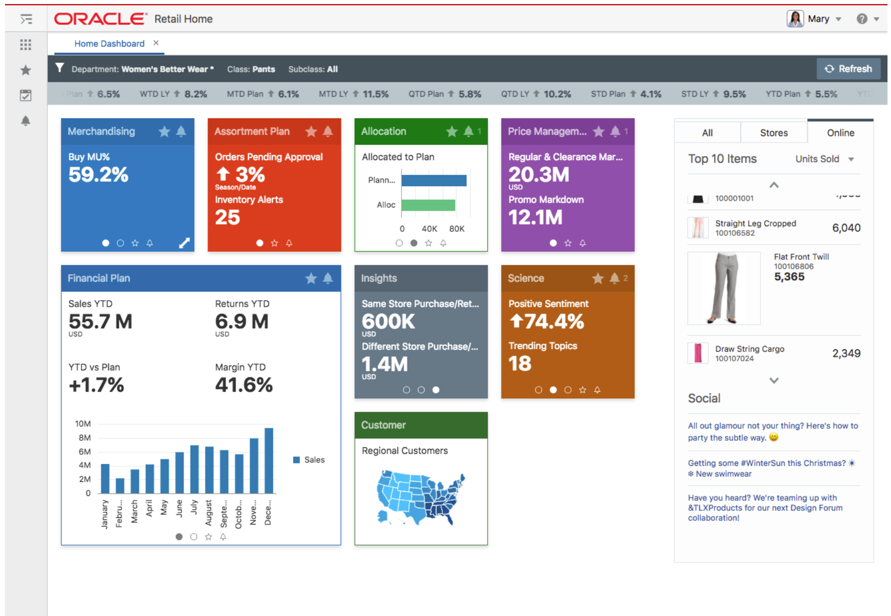
The "Reset to Defaults" button reverts the activation status of all provisioned applications and modules to default.

Figure 2–13 Customer Modules Management Page's "Reset to Defaults" Button

Reset values are not saved until the user clicks on the page's Save button.

Dashboard Configuration

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. A Retail Home administrator configures persona-based dashboards for each enterprise role through the Dashboard Configuration flow.



The Retail Home dashboard can be configured with 4 different kinds of reports.

- *Tile state reports* render within dashboard tiles. A tile can display up to 5 tile state reports.
- *Expanded tile reports* can be launched from a tile state to show more data.
- *Banner reports* render in the region above the tiles.
- *Contextual area reports* render on the right side of the screen next to the tiles and below the banner.

A Retail Home administrator can access the Dashboard Configuration flow as follows:

1. Open the **Settings** menu.
2. Open the **Dashboard and Reports** submenu.
3. Open the **Dashboards** submenu.
4. Select **Dashboard Configuration**. This will open the Dashboard Configuration flow in a tab.

Tile Configuration

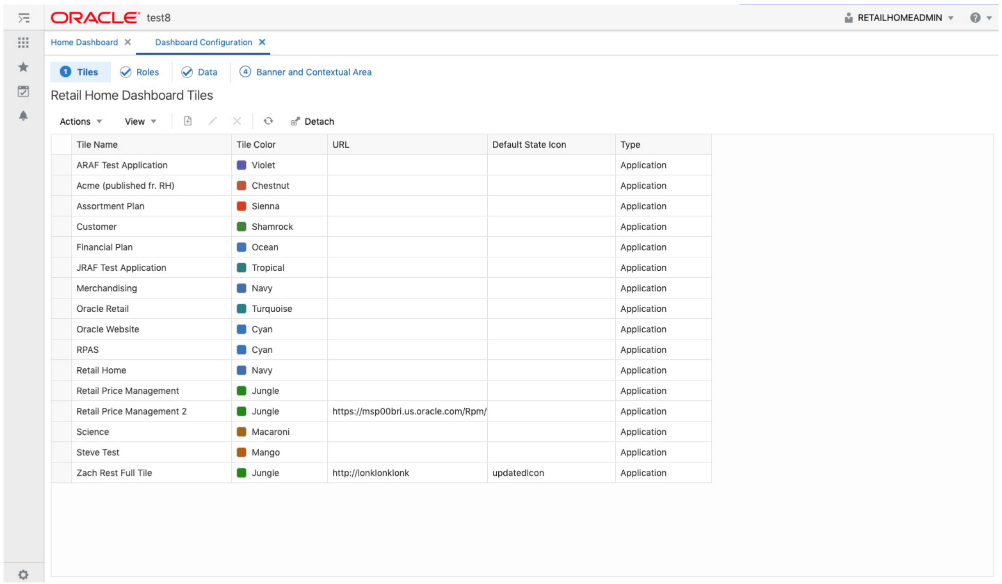
In Retail Home, an administrative user defines dashboards for enterprise roles. Users will see the dashboards configured for their enterprise role(s) when they log in to Retail Home. This section describes how to create dashboard tiles, the first step in the Dashboard Configuration flow.

Adding a Tile

To add a new dashboard tile, complete the following steps:

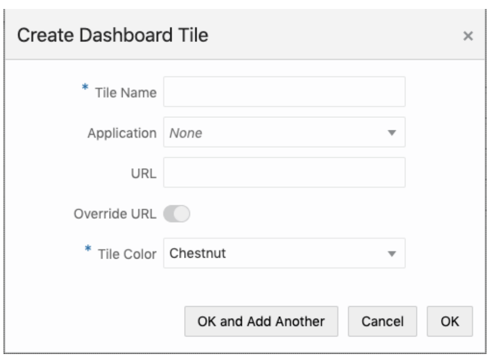
1. In the Dashboard Configuration flow, select the **Tiles** tab if it is not already selected.

Figure 2–14 Creating Dashboard Tiles



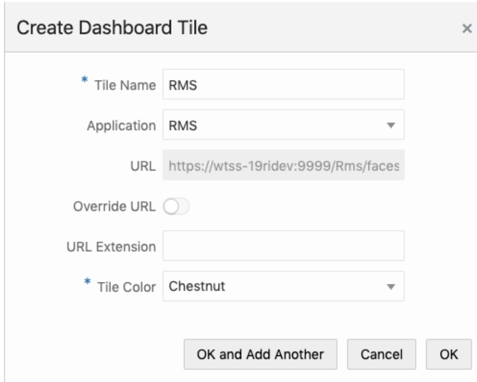
2. Click on the **Add** icon to open the Create Tile Dialog Box.

Figure 2–15 Create Tile



3. Enter text in the Tile Name text box.
4. Select the appropriate **Application** from the drop down. The **URL**, **URL Extension**, and **Tile Color** fields will be populated with corresponding values. The **URL** field gets the application URL automatically, but the user has the ability to override the value using the **Override URL** switch.

Figure 2–16 URL Extension & Override URL Switch

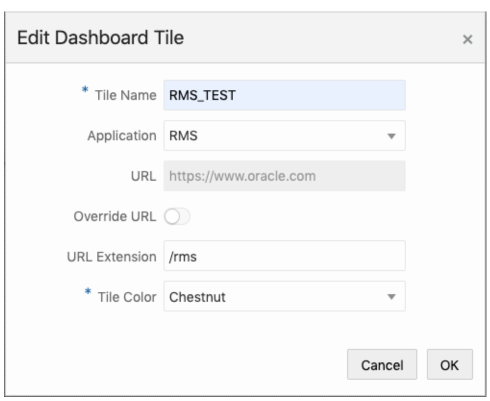


5. The URL field is editable if **Override URL** is enabled. Clicking **OK** when the **URL** field is editable saves the value entered in the text area. Clicking **OK** when the **URL** field is disabled will override the value with the application URL.
6. Enter **URL Extension**. The URL Extension is appended to the URL when the **OK** button is clicked.
7. Select the appropriate **Tile Color** in the drop down.
8. Click **OK** to save your changes and close the dialog box. Click **OK and Add Another** to save your changes. Click **Cancel** to close the dialog box without saving your changes.

Editing a Tile

1. In the **Tile** tab, select a row containing tile information. This will make the **Edit** icon clickable.
2. Click the **Edit** icon to open the Edit Tile Dialog Box. Make edits in the dialog box as shown in Figure 2–17. Click **OK** to save the edits. Click **Cancel** to not save the edits.

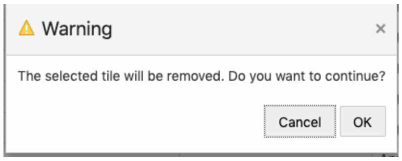
Figure 2–17 Edit Tile



Deleting a Tile

To delete a tile, select the appropriate row in the table, click the Delete icon in the table toolbar, and click OK in the confirmation dialog. Click Cancel to cancel the delete.

Figure 2–18 Delete Tile



Layout Configuration

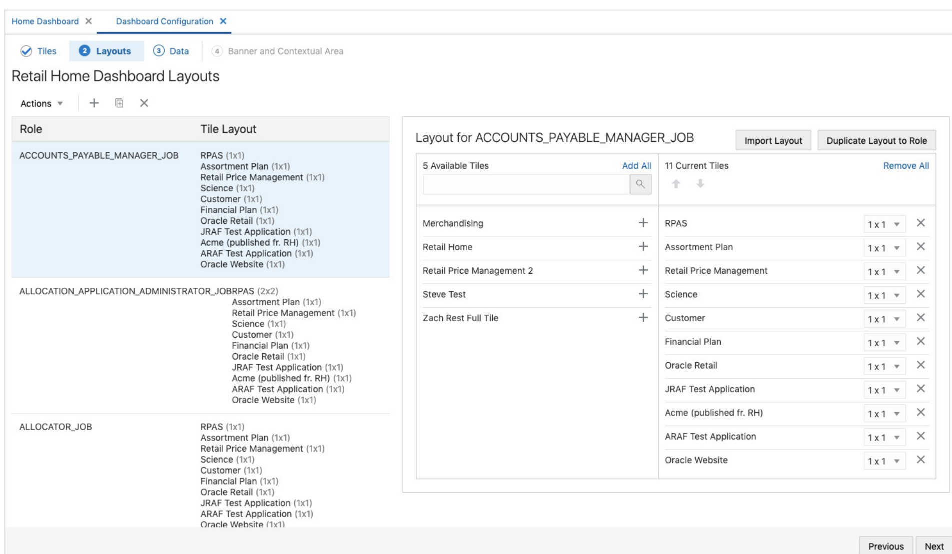
In Retail Home, an administrative user defines dashboards for enterprise roles. Users will see the dashboards configured for their enterprise role(s) when they log in to Retail Home. This section describes how to associate enterprise roles with application tiles.

Adding a Role

To add a new dashboard for a role, complete the following steps:

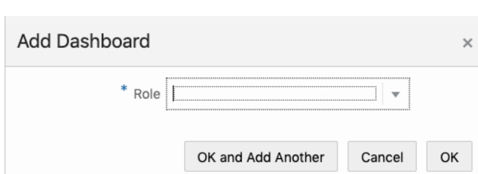
1. In the Dashboard Configuration flow, select the **Layouts** tab if it is not already selected.

Figure 2–19 Mapping Table for Role and Application Tiles



2. Click the **Add** icon. The Add Role dialog box is displayed. The dialog displays a Role Name search listing out the roles that are configured.

Figure 2–20 Add Role



3. Enter text in the **Role Name** text box to search for a specific role. If the result includes more than one role, select the appropriate one.

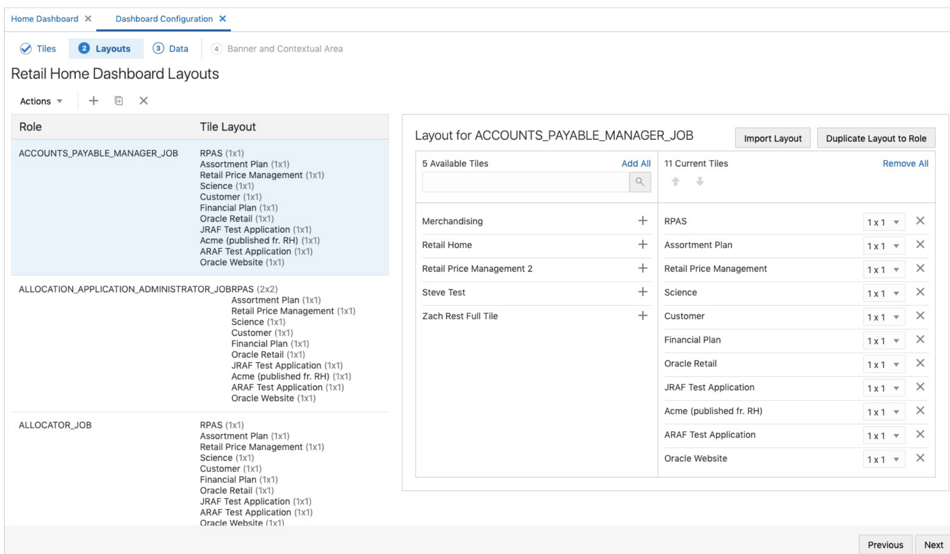
4. Click **OK** to save your changes and close the dialog box. Click **OK and Add Another** to save your changes and to add additional roles. Click **Cancel** to close the dialog box without saving your changes.

Duplicating a Role Configuration

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

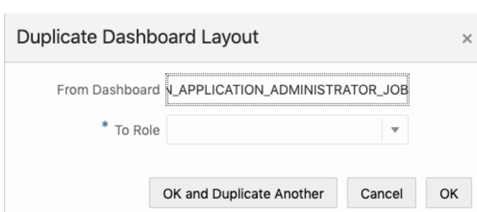
1. In the Dashboard Configuration flow, select the **Layouts** tab if it is not already selected.

Figure 2–21 Mapping Table for Role and Application Tiles



2. Select the row in the table that you wish to duplicate to another role.
3. Click the **Duplicate** icon. The Duplicate Role Configuration dialog box is displayed.

Figure 2–22 Duplicate Role Configuration



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

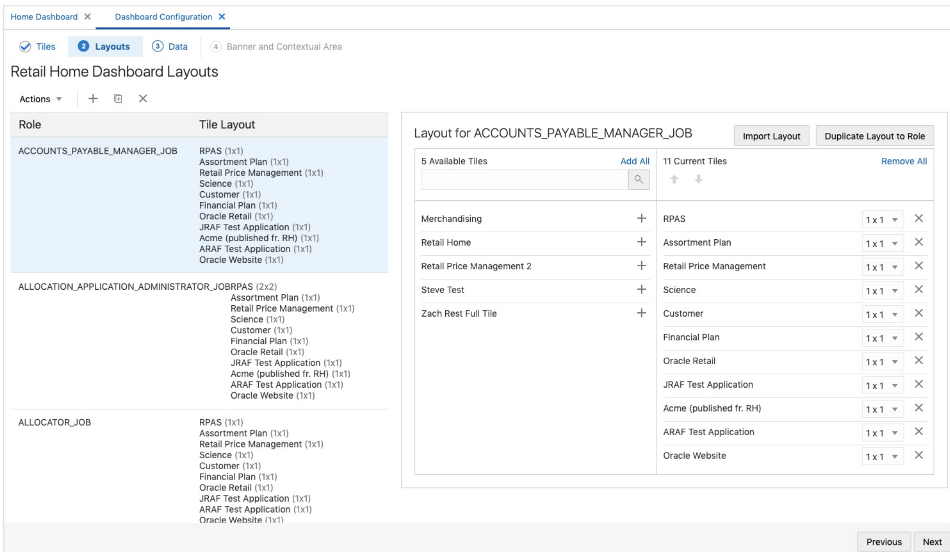
Adding/Editing Tile Layout to a Role

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

To add a tile to a role, complete the following steps.

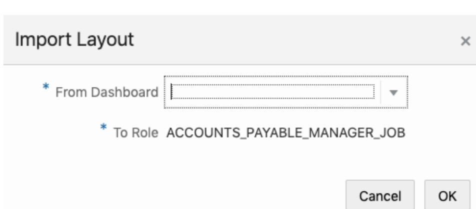
1. From the Dashboard Configuration flow, select the **Layouts** tab if it is not already selected.

Figure 2–23 Mapping Table for Role and Application Tiles



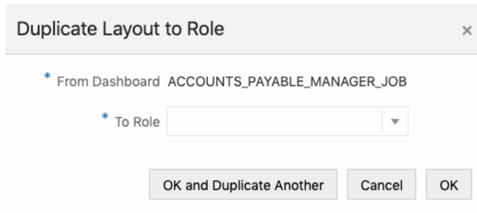
2. Select the Role in the table that you wish to edit. The tiles associated with the role is displayed in the layout table to the right.
3. Click on the add icon for the tile to be associated with the role from the available Tiles listed out on the left column of the layout table. The selected tile is added to the right column of the layout table. The Roles table is also updated with the selected tile.
4. To change the order of application tiles, select a tile and click on the Up/Down Arrow icon. The Roles table is updated accordingly.
5. To adjust the size of a tile, select an alternative size from the drop-down list. The Roles table is updated accordingly.
6. To import Tile Layout of another role to the selected role, click on the import layout button to open Import Layout Dialog box. Select the appropriate role from the drop down. Click OK to confirm the layout change. Click Cancel to close the Dialog box without saving the changes.

Figure 2–24 Import Layout Dialog Box



7. To Duplicate the Tile Layout of the selected role to another role, click on **Duplicate Layout to Role** button. Select the Role to which the layout needs to be applied. Click **OK** to confirm the layout change. Click **Cancel** to close the Dialog box without saving the changes.

Figure 2–25 Duplicate Layout to Role Dialog Box



Deleting a Role

You can delete a role association record along with its associated tile, banner, and contextual configurations.

To delete a role, select that role, click the **Delete** icon in the table toolbar, then click **OK** to confirm the deletion.

Figure 2–26 Delete Role Confirmation

Data 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.

Figure 2–27 shows the Data configuration tab of the Dashboard configuration flow.

At the top of the screen, the Role and Retail Home Tile select controls are used to select which dashboard application tile to configure.

Tile States and Data Sources tables are rendered below the controls and are for configuring tile states and data sources respectively.

The following fields are configurable for Tile States:

- **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.
- **Expanded Report** - This field is optional and is used to indicate which expanded tile report can be launched from this tile state.

The following fields are configurable for Data Sources:

- **Data For** - The report type that the data source is for, either Tile State or Expanded Report.

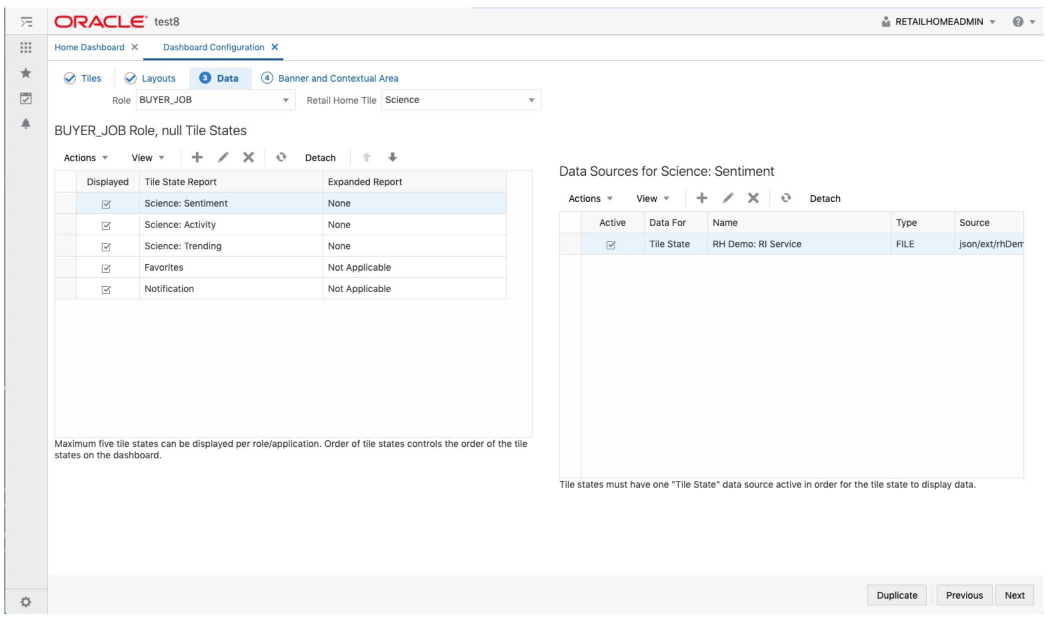
- **Active** - A check box that toggles between two states, active and inactive. Only one data source for a report type can be active at a time.
- **Name** - The name of the data source.
- **Type** - The data type, either REST or FILE.
- **Source** - The URL for the source of the data.

Adding a Tile State

To add a tile state, complete the following steps:

1. In the Dashboard Configuration flow, select the **Data** tab if it is not already selected.

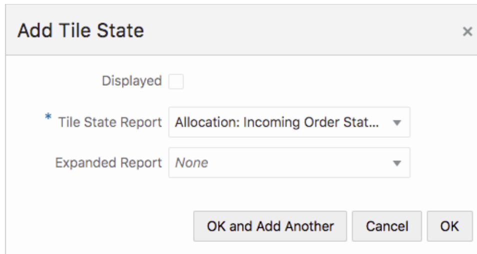
Figure 2–27 Tile Configuration for BUYER_JOB Role and Merchandising Application



2. Select a combination of role and Retail Home Tile from the drop-down list.
3. Click the **Add** icon in the Tile States table toolbar. The Add Tile State dialog box is displayed.

Note: Only five tile states can be displayed for a given role/application at a time.

Figure 2–28 Add Tile State

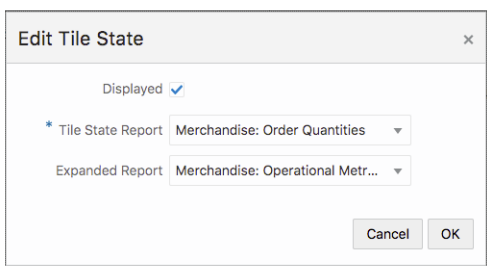


4. Toggle the **Displayed** check box to control whether the tile state displays in the tile or not.
5. Select the desired **Tile State Report** from the drop-down list.
6. Optionally, select the desired **Expanded Report** from the drop-down list.
7. Click **OK** to save your changes and close the dialog box. Click **OK and Add 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 a tile state, select the tile state in the table, click the **Edit** icon in the table toolbar, and make edits in the dialog, as shown in Figure 2–29, "Edit Tile State". Click **OK** to save the edits. Click **Cancel** to not save the edits.

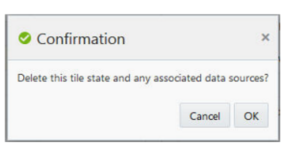
Figure 2–29 Edit Tile State



Deleting a Tile State

To delete a tile state and its associated data sources, select the tile state in the table, click the **Delete** icon in the table toolbar, and click **OK** in the Confirmation dialog. Click **Cancel** to cancel the delete.

Figure 2–30 Delete Tile State

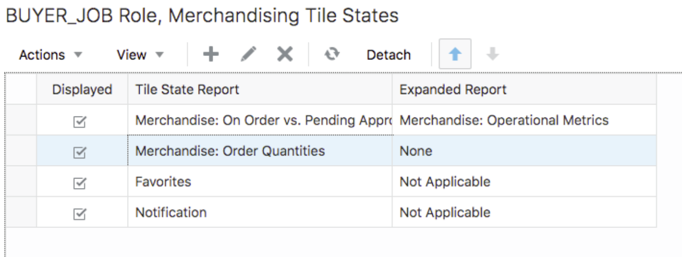


Moving a Tile State

To move a tile state within the list, select the tile state you want to move and use the **Up Arrow** and the **Down Arrow** icons to adjust the position as required.

Note: The Favorites and Notification tile states are always the last two tile states respectively and cannot be moved.

Figure 2–31 Move Tile State

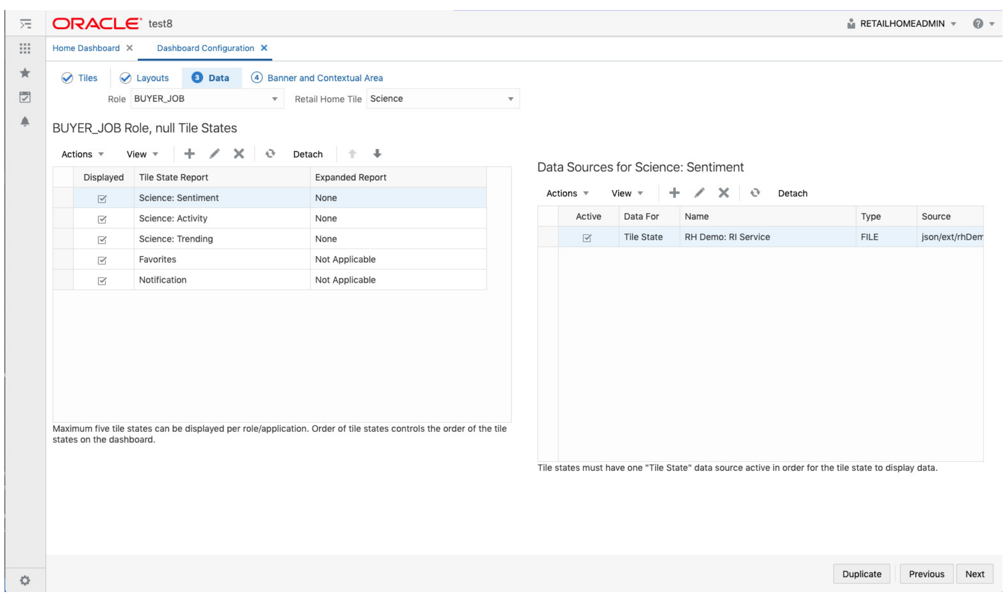


Adding a Data Source

To add a data source, complete the following steps:

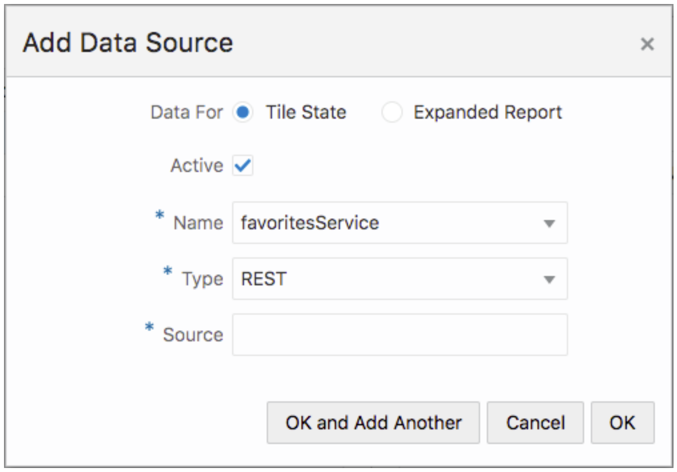
1. In the Dashboard Configuration flow, select the **Data** tab if it is not already selected.

Figure 2–32 Adding Data Source



2. Select a combination of Role and Retail Home Tile from the drop-down menus.
3. Select the Tile State Report that you want to add a data source for.
4. In the Data Sources table toolbar, click the **Add** icon.

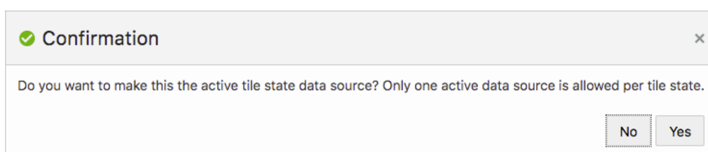
Figure 2–33 Add Data Source



5. Select the **Data For** value. If the data source provides data to a tile state report, select **Tile State**. If the data source provides data to an expanded tile report, select **Expanded Report**.
6. Select the **Active** check box to toggle to the active state.

> **Note:** If another data source is active, you will be asked if you want to make the new data source active upon saving. Click **Yes** to make the new data source active.

Figure 2–34 Change Active Data Source



7. Select the data source **Name** from the drop-down list.
8. Select the data source **Type** from the drop-down list.
9. Enter a valid URL for the data source.

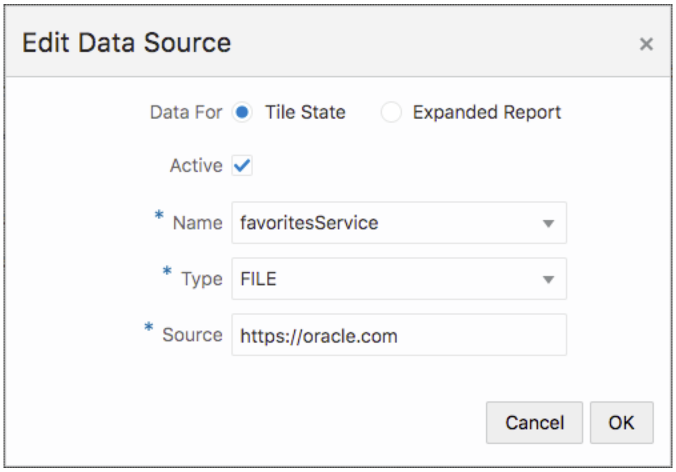
> **Note:** The URL will be validated and you will receive an error message if the URL is not valid.

10. Click **OK** to save your changes and close the dialog box. Click **OK and Add 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 a data source, select the data source in the table, click the **Edit** icon in the table, and edit the values in the Edit Data Source dialog, as shown in Figure 2–35, "Edit Data Source". Click **OK** to save the edits. Click **Cancel** to not save the edits.

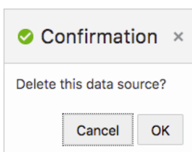
Figure 2–35 Edit Data Source



Deleting a Data Source

To delete a data source, select the one you want to delete, click the Delete icon in the table toolbar, and click **OK** in the Confirmation dialog. Click **Cancel** to cancel the delete.

Figure 2–36 Delete Data Source Confirmation



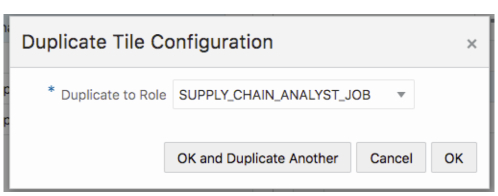
Duplicating a Tile Configuration

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

Click the **Duplicate** button at the bottom of the page. Then, use the Duplicate to Role search to find and select the Role to which you wish to duplicate the configuration.

Click **OK** to duplicate the tile configuration. Click **OK and Duplicate Another** to duplicate more than one tile configuration. Click **Cancel** to not duplicate the configuration.

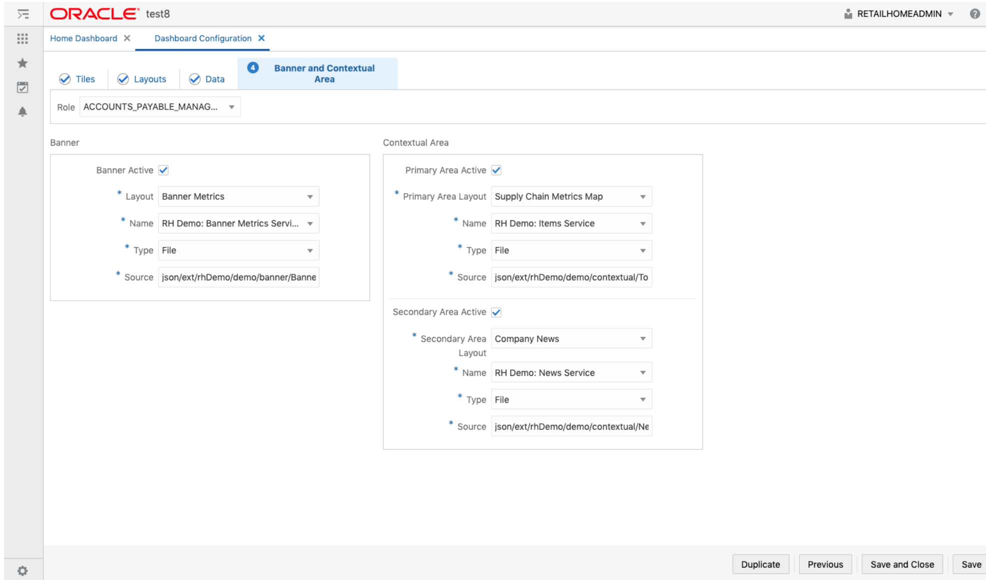
Figure 2–37 Duplicate Tile Configuration



Banner and Contextual Area Configuration

You can configure Retail Home to display reports and metrics in the banner and contextual areas of the Dashboard.

Figure 2–38 Banner and Contextual Area



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

1. In the Dashboard Configuration flow, select the **Banner and Contextual Area** tab if it is not already selected.
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 data source 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 not 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 data source name for the report from the **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.
5. Click **Save** to save your work and continue. Click **Save and Close** to save your work and close the tab.

Duplicating a Banner and Contextual Area Configuration

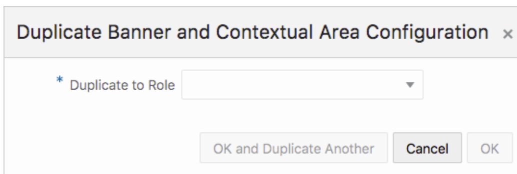
You can duplicate your Banner and Contextual Area Configuration to another role's Dashboard.

Once the configuration has been saved for the currently selected Role, click the **Duplicate** button at the bottom of the page.

Select the role you want to duplicate the configuration to in the **Duplicate to Role** field.

Click **OK** to save your changes and exit the dialog box. Click **OK and Duplicate Another** to repeat the process with another role. Click **Cancel** to not duplicate the configuration.

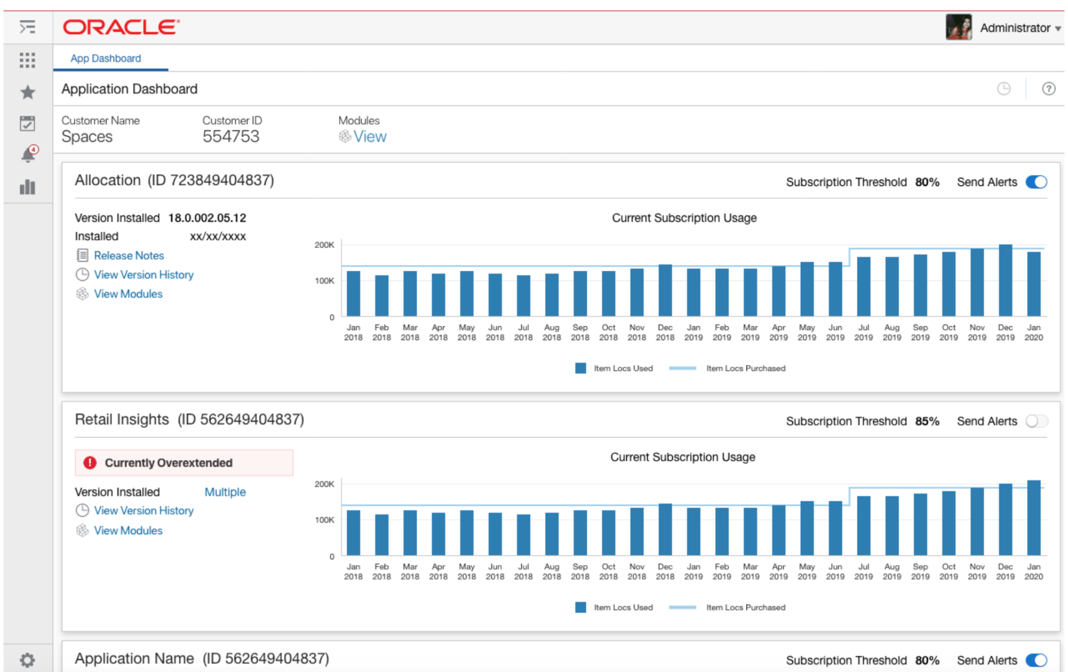
Figure 2–39 Duplicate Banner and Contextual Area Configuration



Application Dashboard

The Retail Home Application Dashboard page gives customer administrators the ability to view information about the products to which they have subscribed.

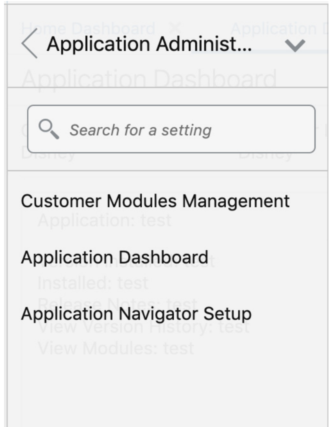
Figure 2–40 Retail Home Application Dashboard Page



Launching the Application Dashboard Page

The Application Dashboard page can be launched from the Retail Home Settings Menu's Application Administration section.

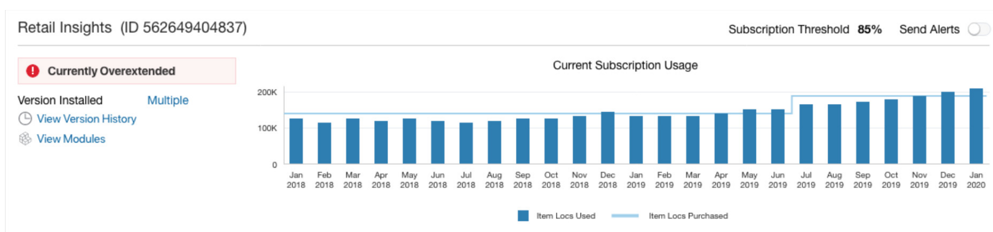
Figure 2–41 Application Dashboard Page Link within Retail Home's Settings Menu



Subscription Metrics

The subscription metrics displays details related to all the applications subscribed by the customer which includes the ability to view usage history, view installed version and turn off alerts for nearing the overextension of a subscription. The default value for alerts is set to "on". The customer would also see a "Currently Overextended" message for applications whose current usage cross the permitted purchased limit.

Figure 2–42 Application Dashboard Subscription Metrics

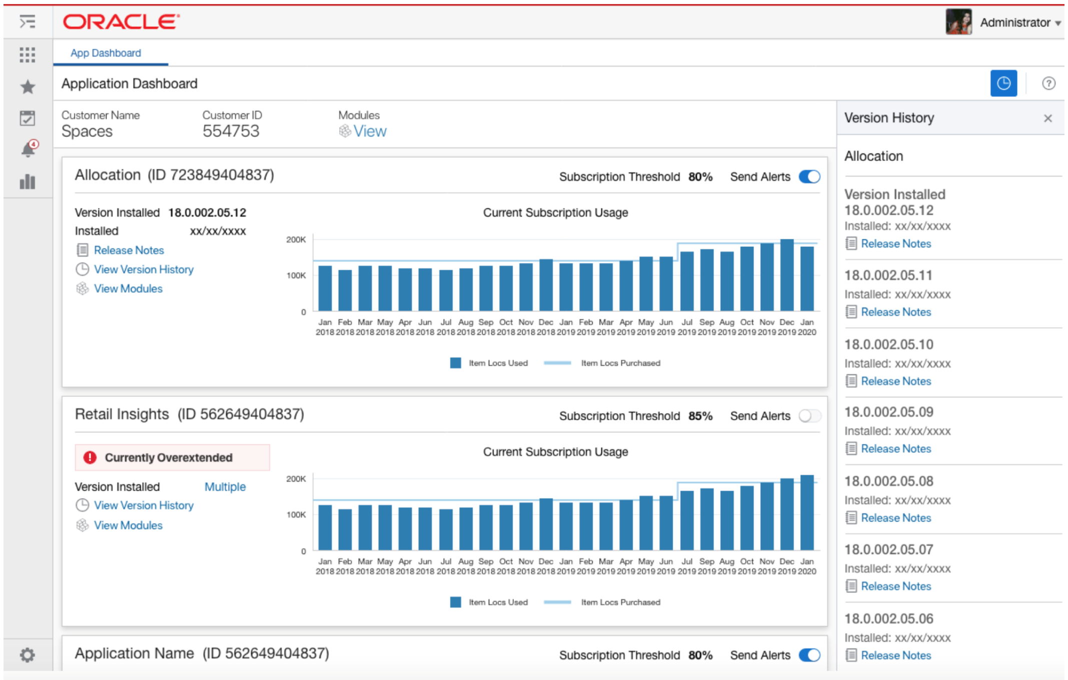


The customer administrator can access list of multiple versions (if present) by clicking on the "Multiple" link assigned to the "Version installed" property.

Version History Contextual Pane

Version history contextual pane shows details related to previously installed versions, installed date and release notes related to each version. The pane can be accessed by clicking the "View Version History" link. If the application does not support version reporting, a "No version information available" message will be displayed.

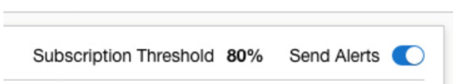
Figure 2–43 Application Dashboard Version History Contextual Pane



Setting Alerts Status

Customer Administrators have the ability to turn on and off alerts for nearing the overextension of a subscription. The default value is set to 'on' position.

Figure 2–44 Application Dashboard Setting Alerts Status



3 Report Configuration

This chapter describes the reports that are included with Retail Home along with requirements for their configuration.

Tile State Reports

These reports are available to use on tile states within an application tile. See Dashboard Configuration for details about configuring tile states and data sources.

Favorites

The Favorites tile state report can be included on an application's tile if that application supports favorites. The Favorites report will display the items (tasks, reports, etc.) that have been marked as "favorite" by the user within the target application. The user can click on a favorite item to launch the favorite item in the target application within a separate browser window.

Sample

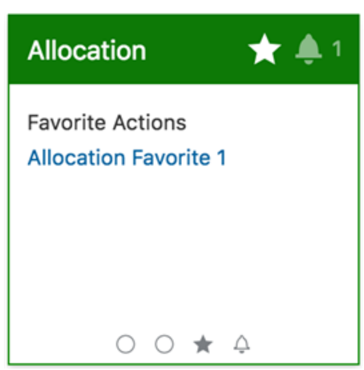


Table 3–1 Data Source Configuration

Name	favoritesService
Type	REST
Source	https://{host}:{port}/RetailAppsReSTServices

Notifications

The Notifications tile state report can be included on an application's tile if that application supports notifications. The Notifications report will display the unread notifications for the current user. The user can click on a notification to launch that notification in the target application within a separate browser window.

Sample

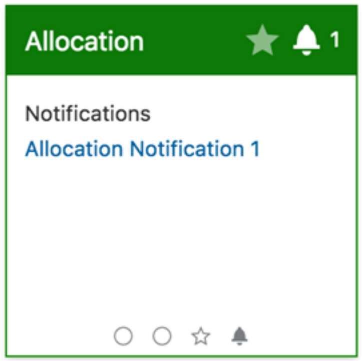


Table 3–2 Data Source Configuration

Name	notificationsService
Type	REST
Source	https://{host}:{port}/RetailAppsReSTServices

Two Metric Summary

The Two Metric Summary report displays one or two metrics in a standard layout. The data is retrieved from a service endpoint that conforms to the standard API supported by this report. Currently this report can be used to integrate with Apex. Refer to the Apex Integration section for more details.

Sample

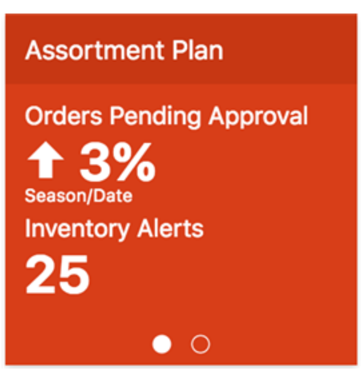


Table 3–3 Data Source Configuration

Name	RetailHomeReportDataService

Table 3–3 (Cont.) Data Source Configuration

Type	REST
Source	https://{host}:{port}/path/to/service/endpoint

Tile State Report Templates

Refer to the Custom Tile State Report Configuration section for details about the available Tile State Report Templates as well as data source configuration requirements for custom reports based on those templates.

4 Custom Tile State Reports Configuration

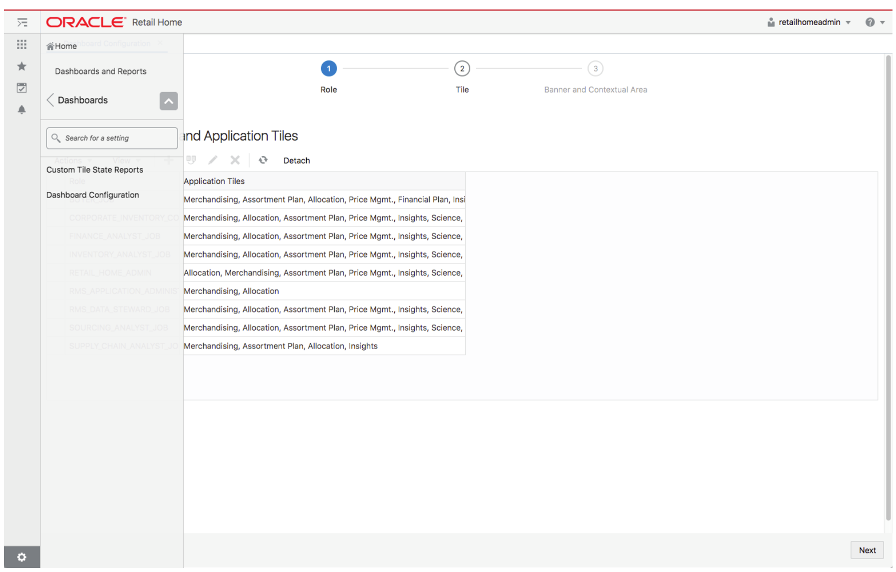
Retail Home not only ships with built-in reports, but also supports the creation of custom tile state reports from within the application.

This chapter 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:

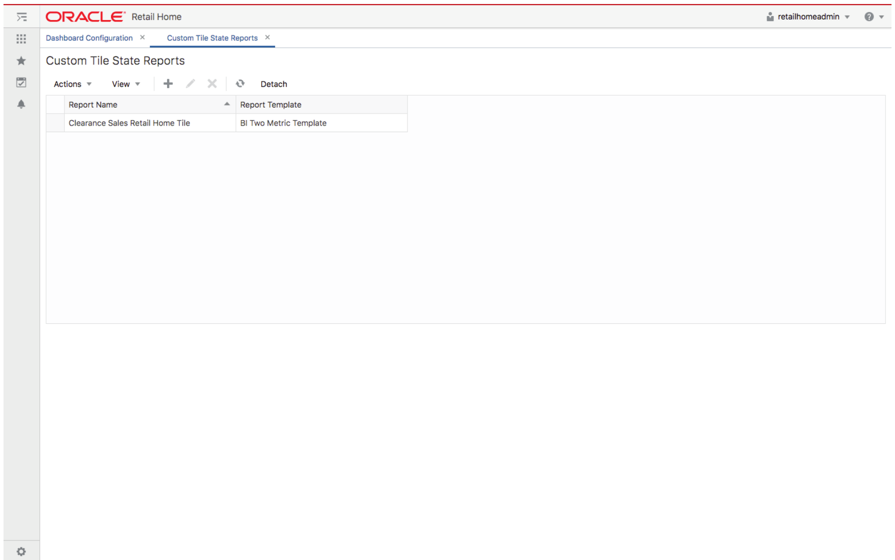
1. Open the Settings navigation menu.
2. Select **Dashboards and Reports**.
3. Select **Dashboards**.

Figure 4–1 Configuration



4. Select **Custom Tile State Reports**, shown in Figure 3-27 Custom Tile State Reports, 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 4–2 Custom Tile State Reports

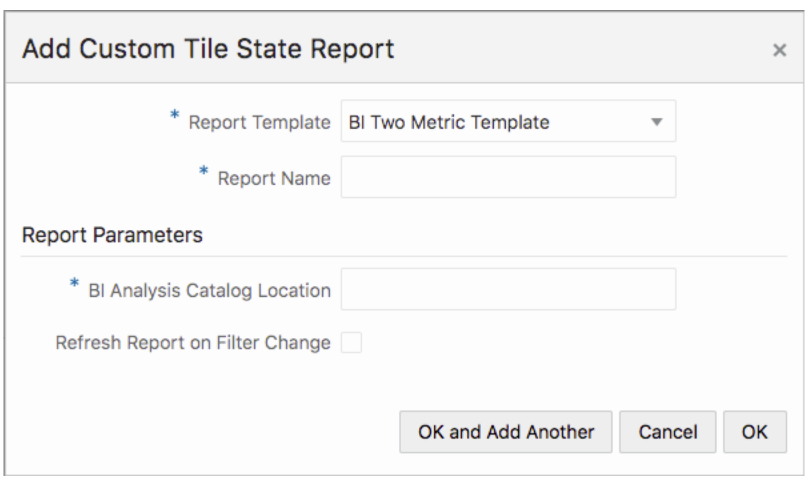


Adding a Custom Tile State Report

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

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

Figure 4–3 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 step of 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.

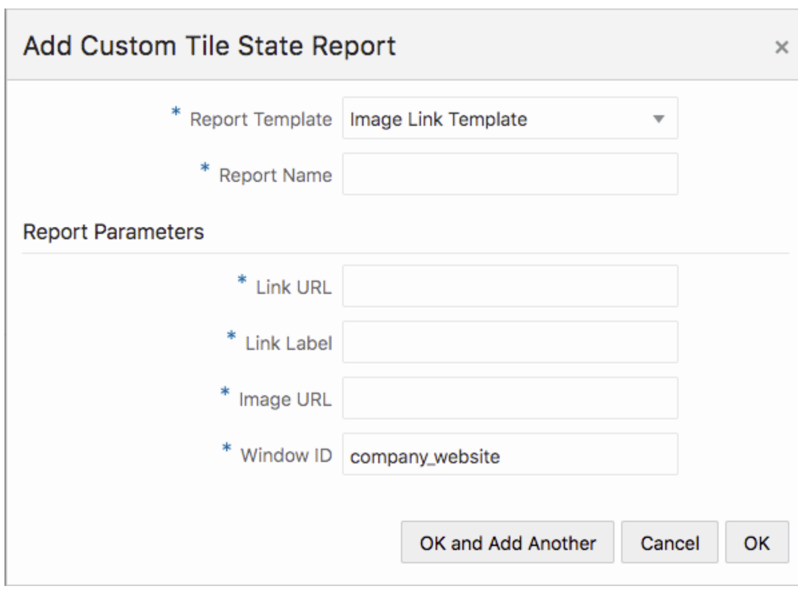
5. Click **OK** to add the custom tile state report or **OK and Add Another** to add the custom tile state report and then add another. Click **Cancel** to not create the custom tile state report.

Configuring the Image Link Template

The Image Link Template allows an administrator to create a tile state report that renders an image that launches a configured link in a new browser tab. For example, an administrator may create a "Company Website" tile state report that shows a company logo that when clicked opens the company's website in a new browser tab.

The following figure shows a tile state report that renders the Oracle logo and launches to the Oracle website.

The following screenshot shows the Image Link Template report parameters.



The Image Link Template has the following parameters:

Table 4–1 Image Link Template Parameters

Parameter Name	Description
Link URL	The URL that will be opened in a new browser tab when the image is clicked.
Link Label	A label that will display when hovering over the image.
Image URL	The URL where the image in the tile can be accessed.

Table 4–1 (Cont.) Image Link Template Parameters

Parameter Name	Description
Window ID	A text identifier specifying which window / browser tab to open the link in. If you create multiple Image Link reports, but you want them all to open in the same browser window or tab, you would specify the same Window ID in each report. Otherwise, this can be any unique value.

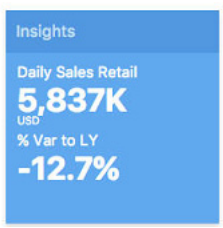
Configuring BI Two Metric Template

Tile state reports created from the BI Two Metric Template render the common Two Metric Template tile state layout with data coming from a Retail Insights (RI) analysis.

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

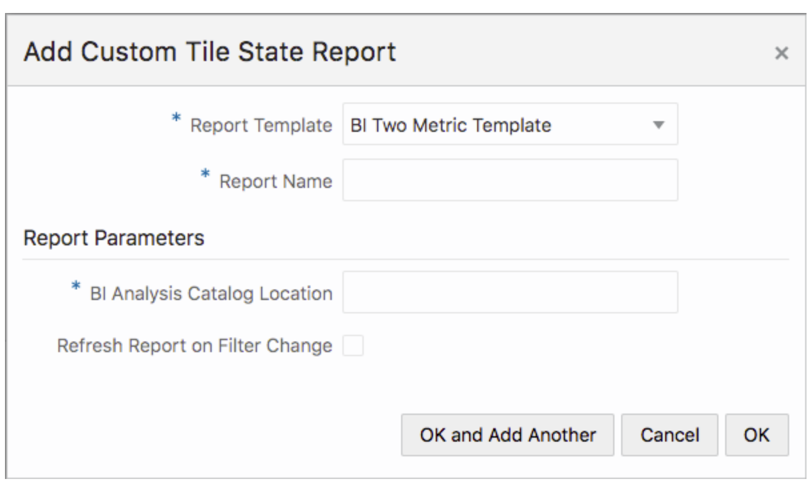
The following tile state uses the Two Metric Template tile state layout:

Figure 4–4 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:



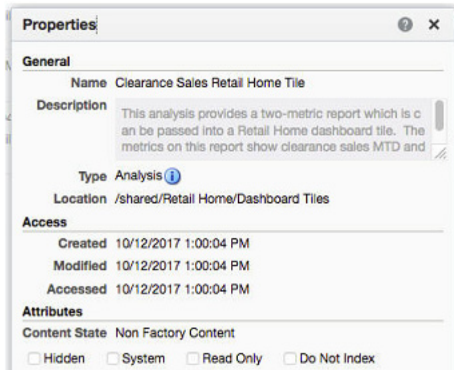
BI Analysis Catalog Path

The BI Analysis Catalog Location is the path to the analysis within RI.

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

For example: `/shared/Retail Home/Dashboard Tiles/Clearance Sales Retail Home Tile`

Figure 4–5 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 RI analysis must match the documented format discussed in this section.

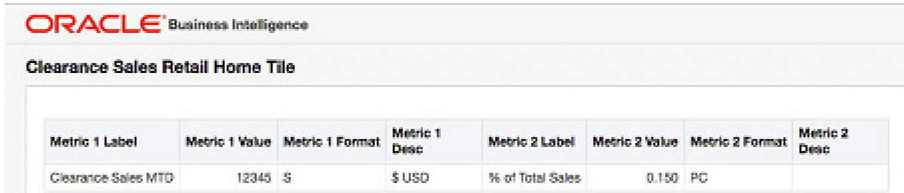
The analysis must have the following columns, in this specified order:

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: This template requires data for at least one metric and can display up to two metrics.

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

Figure 4–6 Example Analysis in OBIEE



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

Table 4–2 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%

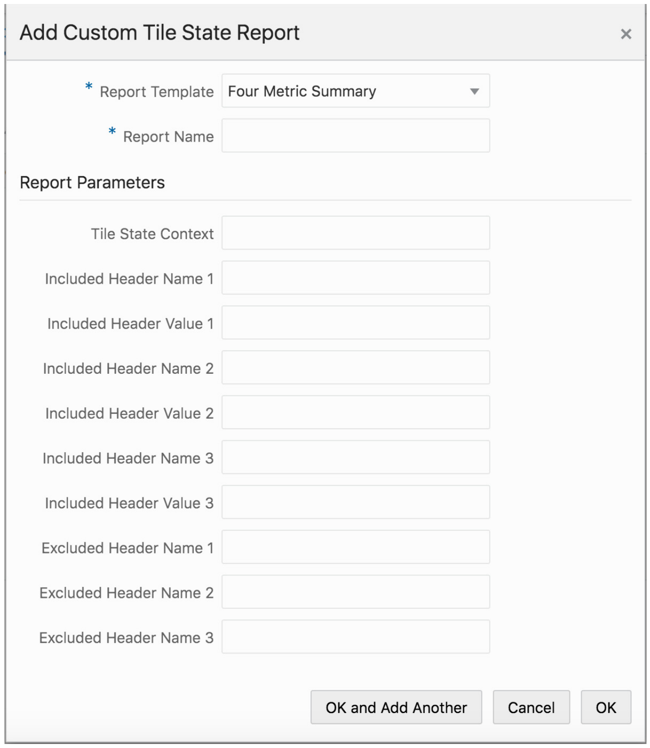
No data source is required when adding tile state reports created with the BI Two Metric Template, since Retail Home can determine the data source from the information provided during installation; however, for more fine-grained control, configure a data source for each report created from the BI Two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

Refresh Report on Filter Change

This parameter when checked indicates that the tile state report should refresh when the user updates the Retail Home dashboard filter. If not checked, the report will not reload. If checked, the report will reload. If the RI analysis supports being filtered by merchandise hierarchy, the report's data will be filtered by the user's merchandise hierarchy selection.

Configuring the Metric Summary Template

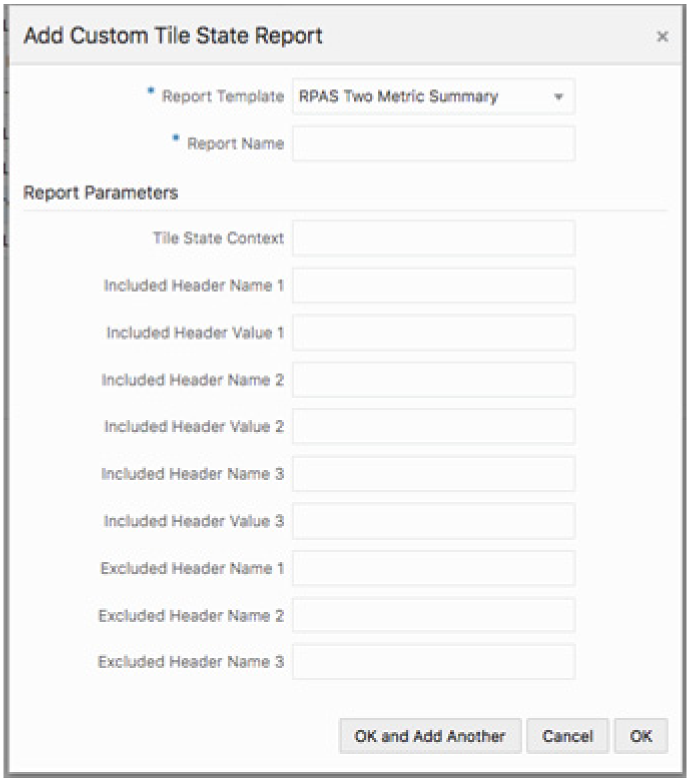
The metric summary templates are configured to render arbitrary metric summary tiles in Retail Home. There are templates for two, four, and six-metric tiles.



Administrators can configure the report to include or exclude specific headers when sending requests to the service. Additionally, this template supports sending a tileStateContext query parameter based on the RPAS templates, which consuming applications can use to send additional configuration data to the service.

Configuring the RPAS Metric Summary Template

The RPAS (Retail Predictive Application Server) Metric Summary Templates are pre-configured to render metrics sourced from the RPAS services as metric summary tiles in Retail Home. They are available for displaying two, four, or six-metric tiles.



The template has the following features:

- It allows RPAS services to be called with a configurable context value called the Tile State Context. This context value will be passed a query parameter (`tileStateContext`) to the RPAS services. The RPAS services can inspect this value to mutate business logic when calculating the metrics.
- It is tailored for RPAS services standards for REST invocation. Specifically, RPAS Services will be called with the following characteristics:
  - The REST request header "X-Requested-By" is always included with a value of "true".
  - The REST request header "Accept-Version" is always excluded.

Administrators for Retail Home can use the "Add/Edit Custom Tile State Report" dialog to specify the Tile State Context value to be sent to the supporting RPAS service.

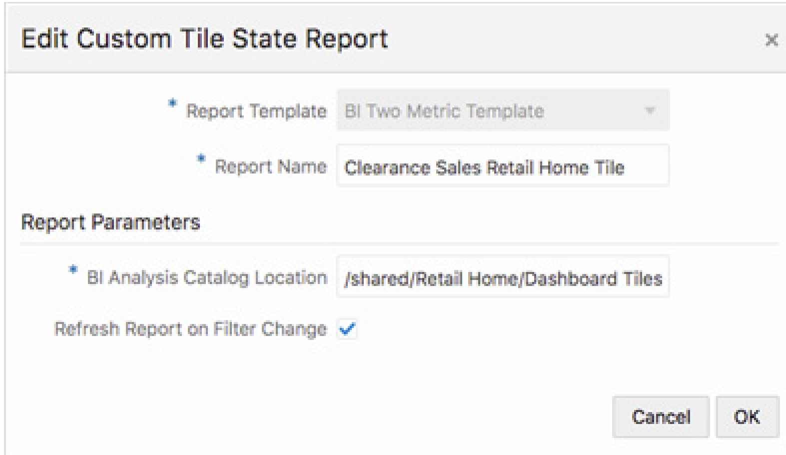
Administrators can also specify additional headers to be included and excluded in the REST service calls through the dialog.

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 the Edit Custom Tile State Report dialog.

Figure 4–7 Edit Custom Tile State Report



3. Make edits to the fields that you wish to change.

> **Note:** 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:

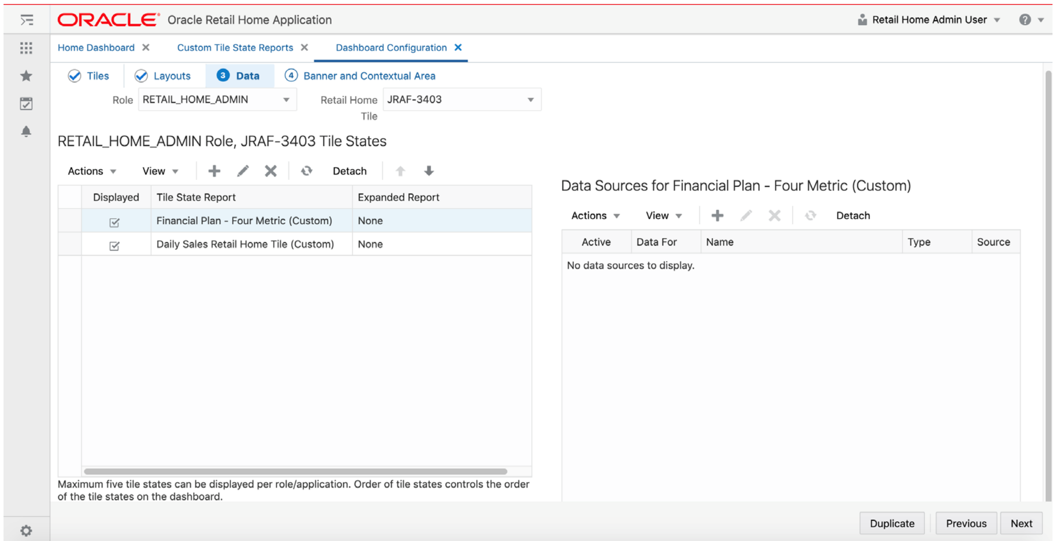
1. Select the tile state report that you want to delete in the table.
2. Click **Delete** in the table toolbar. You see a confirmation.
3. Click **OK** to delete the custom tile state report. Otherwise, click **Cancel**.

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 step of 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:** 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 4–8 Custom Tile State Report



5 Oracle Application Express Integration

Retail Home is capable of accessing data through Oracle Application Express (APEX).

This integration works by creating a REST service in APEX that returns data to be rendered in a Retail Home report. A Retail Home administrator then must configure the report in Retail Home to pull its data from the APEX service. For more information on how to configure Dashboards within Retail Home, see Dashboard Configuration. For more information about how to create REST services through the APEX UI, please refer to the Oracle APEX documentation.

Only certain reports within Retail Home support APEX integration, and the APEX REST service must return data in the correct format expected by the report for the integration to work. This document discusses how to integrate APEX with Retail Home reports.

Two Metric Tile State Report

Retail Home provides a common two metric tile state report layout. It renders up to two metrics with metric names, metric values, metric labels, and optional indicators, such as arrows showing an increase or decrease in the metric value.

Service Query Structure

To integrate with this report, first create an APEX service. This service must be implemented as a SQL Query that returns 1 to 2 rows of data. A UNION can be used to return up to two rows.

The service must be configured to return the results as JSON, and the query must return the following columns:

Table 5–1 Columns Returned by Query

Column Name	Required	Description
NAME	Yes	The name of the metric value. This is displayed above the metric value.
VALUE	Yes	The metric value itself.
VALUE_FORMAT	No	An optional metric value formatting code. See the table of valid format values. If no VALUE_FORMAT is returned, Retail Home will not format the metric value.
VALUE_LABEL	No	An optional label that further describes the metric value (e.g. a currency code). This label is displayed below the metric value.

Table 5–1 (Cont.) Columns Returned by Query

Column Name	Required	Description
INDICATOR	No	An optional indicator that is rendered before the metric value. See the table of valid indicator values.

The following table lists the supported format values:

Table 5–2 Format Values

Format Value	Meaning	Example
PC	Percent	Formats 0.045 as 4.5%
S	Short Number	Formats 9950000 as 9.95M
N	Number	Formats 1234567.89 as 1,234,567.89

The following table lists the supported indicator values:

Table 5–3 Indicator Values

Indicator Value	Meaning
up	An upward pointing arrow
down	A downward pointing arrow
normal	A normal severity indicator.
info	An info severity indicator
important	An important severity indicator
critical	A critical severity indicator

Service Query Examples

The following examples show different valid queries that can be used to return data that is in a compatible format with the Retail Home Two Metric tile state report. The examples select constant values from dual to demonstrate the concept; an actual service implementation's query would select real values from a table.

The following example query shows all the possible columns being returned:

```
select
  'Metric 1' NAME,
  1234567890 VALUE,
  'S' VALUE_FORMAT,
  'USD' VALUE_LABEL,
  'critical' INDICATOR
from dual
```

The following example query shows only the required columns being returned:

```
select
  'Metric 1' NAME,
  1234567890 VALUE
from dual
```

The following example query shows two rows being returned using a union:

```
select
```

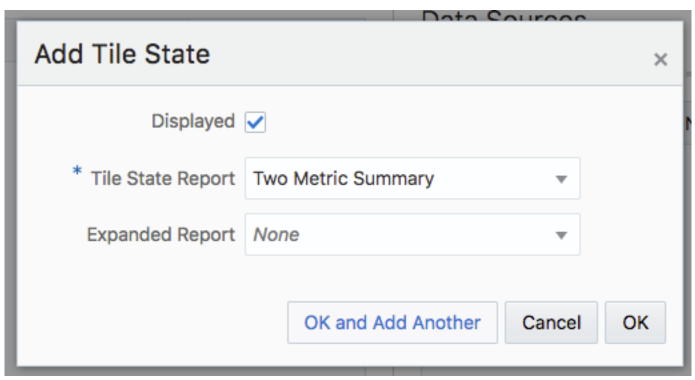
```
  'Metric 1' NAME,
  1234567890 VALUE,
  'S' VALUE_FORMAT,
  'USD' VALUE_LABEL,
  'critical' INDICATOR
from dual
union
select
  'Order Count' NAME,
  8 VALUE,
  NULL VALUE_FORMAT,
  NULL VALUE_LABEL,
  NULL INDICATOR
from dual
```

Retail Home Tile State Report Configuration

This tile state report can be configured on the Tile Configuration train stop of the Dashboard Configuration screen.

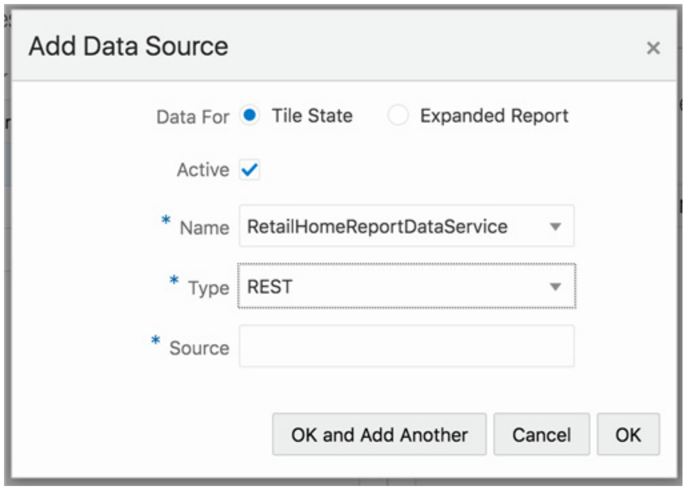
First, create a new tile state:

1. Check the **Displayed** checkbox.
2. Select **Two Metric Summary** in the **Tile State Report** field.
3. Select an **Expanded Report** if an expanded report should be accessible through this tile state.
4. Click **OK**.



Then, add a data source for the tile state that will connect to your APEX service:

1. In the Data For field, select **Tile State**.
2. Check the **Active** checkbox.
3. In the **Name** field, select **RetailHomeReportDataService**.
4. In the **Type** field, select **REST**.
5. In **Source**, enter the complete URL to your APEX service.
6. Click **OK**.



Supporting Retail Home Filters

Retail Home users can filter the data displayed in their dashboard by Merchandise Hierarchy, if this feature was enabled in the Retail Home installation.

Retail Home passes these optional filter values as query parameters to the REST Service endpoint that is configured in APEX.

In the SQL query of an APEX REST Service endpoint, reference these filter values using following variables:

- :departmentId
- :classId
- :subclassId

The following query example shows how different rows can be returned depending on what `departmentId` value is passed in the REST service query parameter:

```
select
  'Metric 1' NAME,
  1234567890 VALUE,
  'S' VALUE_FORMAT,
  'USD' VALUE_LABEL,
  'critical' INDICATOR
from dual
union
select
  'Order Count' NAME,
  8 VALUE,
  NULL VALUE_FORMAT,
  NULL VALUE_LABEL,
  NULL INDICATOR
from dual
where :departmentId IS NULL
union
select
  'Order Count' NAME,
  10 VALUE,
  NULL VALUE_FORMAT,
  NULL VALUE_LABEL,
  NULL INDICATOR
from dual
```

```
where :departmentId = 1000
```

This idea can be extended to test for different values and to incorporate the classId and subclassId values as well.

6

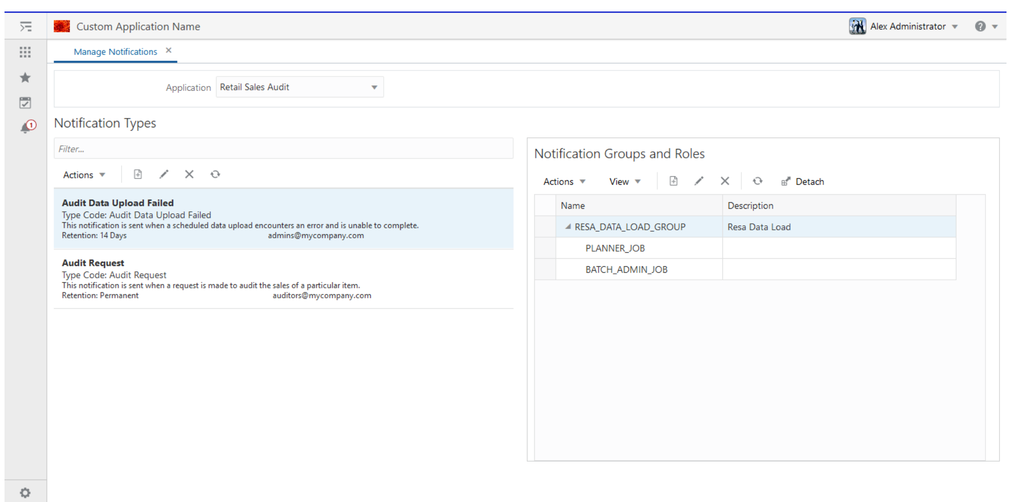
Notifications Administration

RGBU Applications provide a feature-rich notifications framework, which sends a variety of different types of notifications to specific groups of users. Retail Home provides administrators with the ability to define types of notifications, set up groups of user roles that should receive each type, and configure how notifications of each type should be handled.

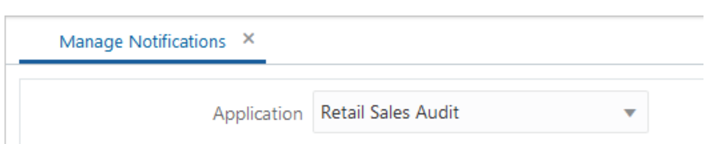
Manage Notifications

An administrator can access the Manage Notifications page through the Settings menu. To access the page, click Manage Notifications in the settings menu.

On this page, the user will see a section at the top to select the application which will be configured, and below that, a section titled Notification Types, and a section titled Notification Groups and Roles. Depending on the size of the user's browser window, the Notification Groups and Roles section may either appear to the side or below the Notification Types section.

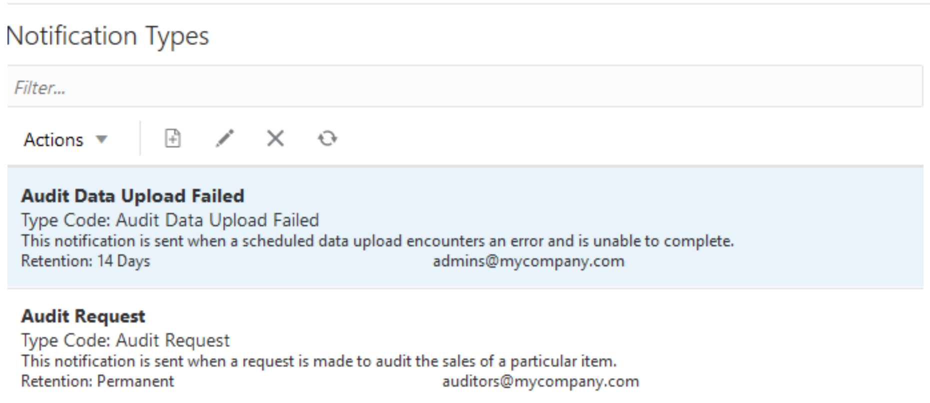


When arriving at the Manage Notifications page, the administrator should first check the Application dropdown, to ensure that the desired application is selected. Only the selected application will be configured.



Notification Types

The user can see the notification types on this page, under the heading Notification Types. In this area, the user will see a Filter bar, a toolbar with actions, and a list of notification types.



Notification Types Filter

The user can type in the filter bar to filter the list of notification types. The filter will display only the types that contain the filter text anywhere in the type name, type code, or description.

Notification Types Toolbar

The Notification Type Toolbar contains an Actions menu as well as four icon buttons: Create, Edit, Remove, and Refresh. These actions are described in further detail below.

Notification Types List

Each notification type in the list contains several pieces of information. First, in bold, is the name of the notification type.

Below that is the type code used by the system to identify the type, and a description of the type.

At the bottom, a Retention field indicates how long notifications of this type will be kept before they are deleted from the system. If the retention specifies permanent, then notifications of this type will never be deleted.

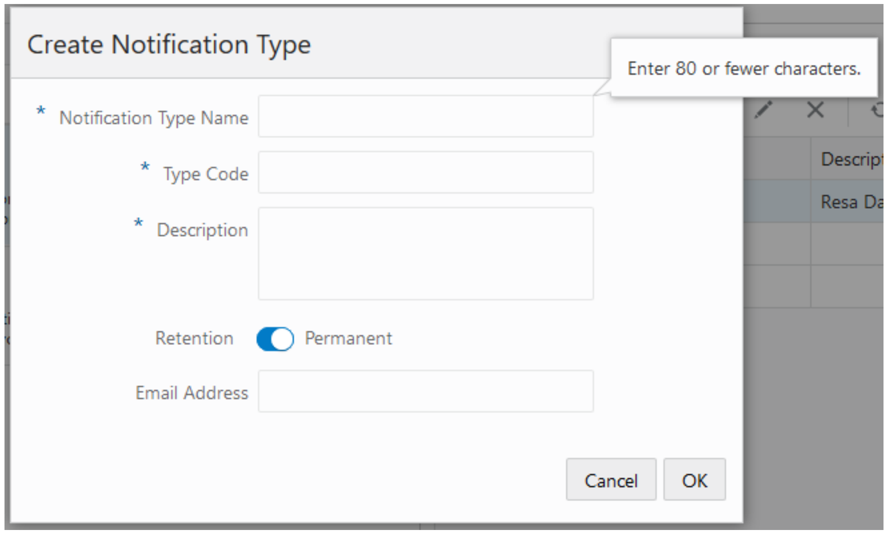
The last piece of information for a notification type is an email address, which will be sent an email notification whenever a notification of this type is generated. This field was designed to contain a mailing list email, but strictly speaking any email address may be provided.

The user can select one notification type from the list. Selecting a notification type will enable the edit and remove actions in the toolbar, as well as update the data in the Notification Groups and Roles section, discussed further below.

Creating and Editing Notification Types

To create a new notification type, the user must select the Create button on the toolbar or the Create item from the Actions menu. Similarly, to edit a notification type, the user must first select the type to be edited, and then select the Edit button on the toolbar or the Edit item from the Actions menu.

When the user selects the Create or Edit action, a popup will appear prompting for the notification type details. If the user selected Edit, the fields of the popup will be prepopulated with the values of the selected notification type.



After entering the values for the fields, the user must click OK to finish creating or editing the type. At any time, the user may click Cancel to close the popup without creating or editing the notification type.

Removing a Notification Type

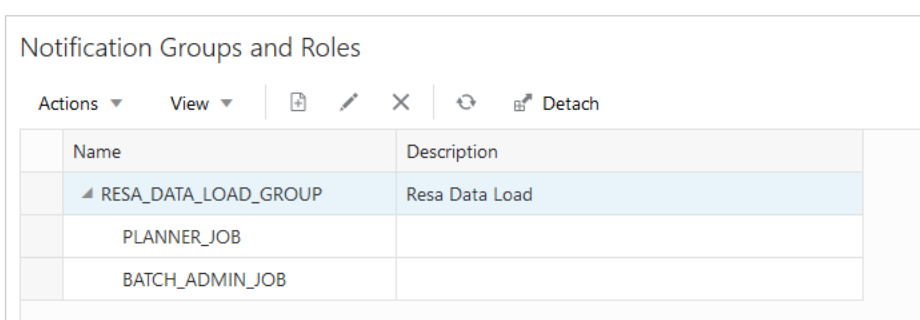
To remove a notification type, the user must first select the notification type to be removed. The user must then select the Remove button from the toolbar or the Remove item from the Actions menu. The user will then be presented with a confirmation popup. If the user clicks OK, the notification type will be removed. In addition, all existing notifications of this type will also be removed.

Refreshing Notification Types

At any time, the user may select Refresh from the toolbar or Actions menu. This will cause the page to refresh the list of Notification Types.

Notification Groups and Roles

Next to the Notification Types, the user can see the notification groups and roles that are associated with the selected notification type.



In this area, the user will see a toolbar and a tree table listing the notification groups currently assigned to the selected notification type. The user can expand each notification group to view the roles that are part of the group. If no notification type is selected, this region will instruct the user to select a notification type.

Notification Groups and Roles Toolbar

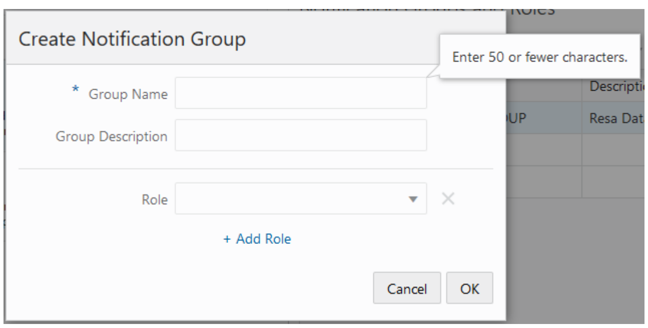
The Notification Type Toolbar contains an Actions menu, and buttons for Create, Edit, Remove, Refresh, and Detach. These actions are described in further detail below.

Creating and Editing Notification Groups

To create a new notification group, the user must select the Create button on the toolbar or the Create item from the Actions menu. Similarly, to edit a notification group, the user must first select the group to be edited, and then select the Edit button on the toolbar or the Edit item from the Actions menu.

When the user selects the Create or Edit action, a popup will appear prompting for the notification group details. If the user selected Edit, the fields of the popup will be prepopulated with the values of the selected notification group.

Figure 6–1 Create Notification Group



On this popup, the user may add, edit, or remove roles from the notification group. To add the first role, simply type the name of the role into the **Role** field. To add more than one role, select the **Add Role** link below the Role field for each new role to be added. To edit a role, simply edit the text of the corresponding role field. To remove a role, click the **Remove** button for the corresponding role. Note that each role must correspond to a valid security role in the Identity Store. If a security role is not valid, the group will not be added or edited.

If the administrator edits a notification group, such as by adding or removing a role from the group, the changes will affect every notification type the group is assigned to, as well as all existing notifications of those types.

After entering the values for the fields, the user must click **OK** to finish adding or editing the group. At any time, the user may click **Cancel** to close the popup without creating or editing the notification group.

Removing Notification Groups

To remove a notification group from a notification type, the user must first select the notification group to be removed. The user must then select the **Remove** button from the toolbar or the **Remove** item from the Actions menu.

The user will then be presented with a confirmation popup. If the user clicks **OK**, the notification group will be removed from the notification type.

Removing a notification group from a notification type will affect all existing notifications of the selected type. These notifications will no longer be visible to users from the removed group, unless they are part of a different group which still has access to the notification type.

The notification group may still be assigned to other notification types – only the currently selected type will be affected.

Refreshing Notification Groups

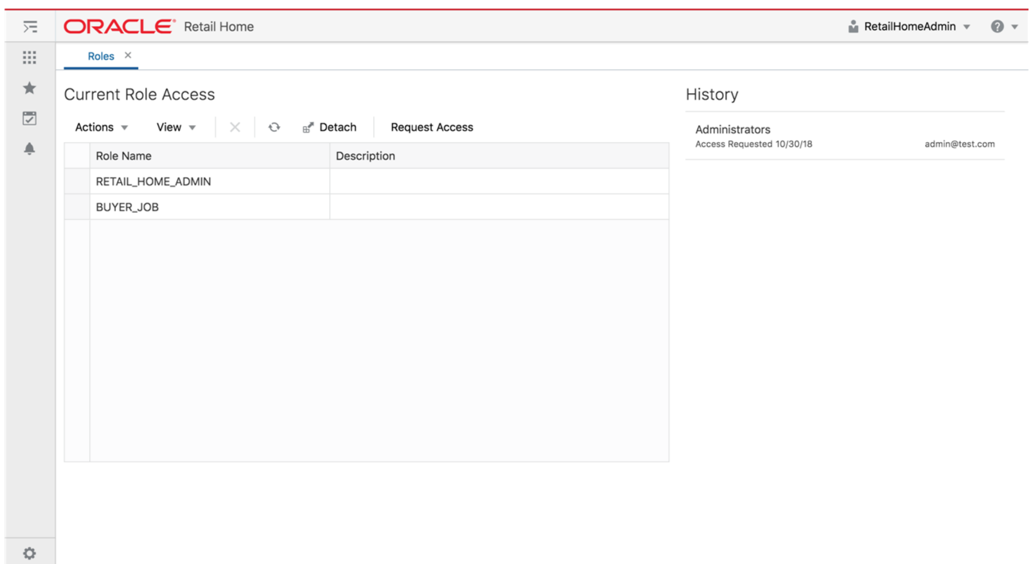
At any time, the user may select **Refresh** from the toolbar or Actions menu. This will cause the page to refresh the list of Notification Groups and Roles.

Detaching the Notification Groups Region

The user may detach the Notification Groups and Roles region from the page, causing it to appear as a popup. To do this, the user must select the **Detach** button from the toolbar or the **Detach** item from the View menu. To reattach the region to the page, the user must select the **Detach** button again, or select the **Attach** item from the View menu.

7 Role Requests

Retail Home users can use the Roles task in the Tasks menu to see their current role access, make requests for new roles, make requests to remove roles and view a history of previous requests.



Role Request Flow

When a user makes a request to add or remove a role a record is stored in the role request history for that user and a notification with the details of the request is generated in Retail Home. Admin users who have the role RH_ROLE_REQUEST_ABSTRACT or RH_ROLE_REMOVE_ABSTRACT (depending on the request type) will receive the notification and can launch the IDCS Admin UI from the notification to handle the request.

Configuration

Incomplete Configuration

The configuration settings below must be completed before a user can make requests to add or remove roles. If any of these is not completed then the user will receive the following message when attempting to add or remove roles: "Roles Hub configuration is not complete. Contact an Administrator to complete the setup process."

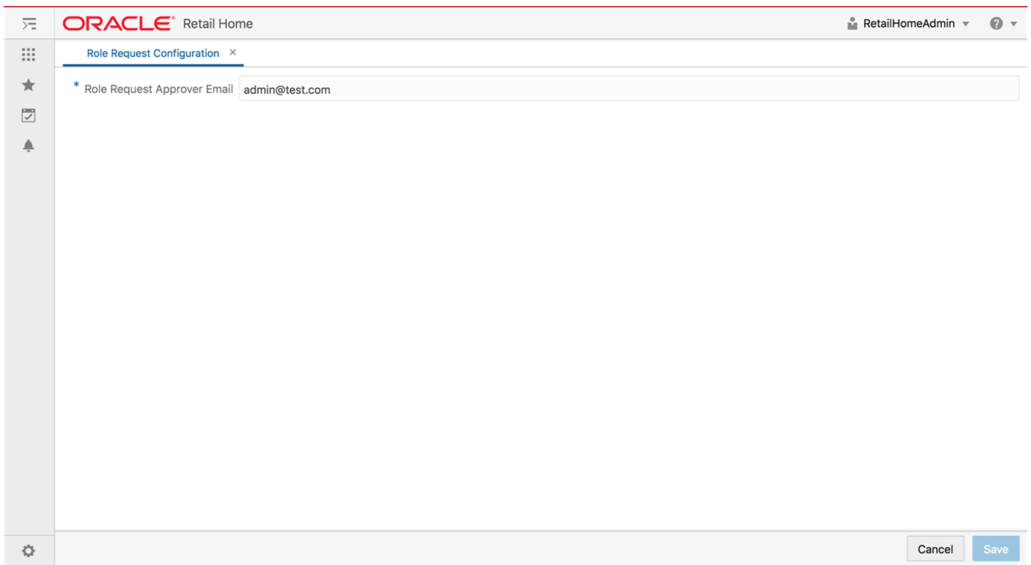
IDCS Admin URL

Retail Home must be configured with a URL to launch the IDCS Admin UI during the installation of Retail Home (see the *Retail Home Install Guide* for details). When users make role requests a notification will be generated in Retail Home for the RH_ROLE_REQUEST or RH_ROLE_REMOVE notification type depending on the type of request. An admin user who has received this notification can click on the notification to launch the IDCS Admin UI using the URL that was configured during installation.

Role Request Approver Email

When users make a request to add or remove a role a record is stored in the request history for that user. An approver email address is stored on the history record to indicate to the user who they can contact about the status of their request. No emails are generated by the system to this email address

The role request approver email can be configured from the Role Request Configuration page, which can be accessed through the Settings menu (**Settings->Role Request Configuration**).



Retail Home Application Navigator Setup

In order to create and display notifications for the Retail Home application a record representing the Retail Home application must be configured in the Application Navigator Setup page. This record must be configured with the "RH" application code and a valid Platform Service URL. Platform services are not deployed with Retail Home, so the Platform Service URL should point to the platform services deployment for one of the other installed retail applications that includes the platform services. See the Application Navigator Setup chapter for details on using the Application Navigator Setup page.

8 Resource Bundles

All Oracle Retail applications come packaged with resource bundles, files that contain text resources. These text resources appear throughout the Oracle Retail application as instructions, messages, labels, errors, virtually any text that appears in the application comes from a resource bundle.

Many Oracle Retail applications support the ability for retailers to customize the text that appears in the Oracle Retail application to better match that retailer's business language. The capability to change the text for a resource is provided through the Resource Bundles area of Retail Home. Retailers can customize text resources for any Oracle Retail supported language.

Resources and Customizations Explained

All text resources in the Oracle Retail application have the following values:

- **Base Application Code** - This value identifies the Oracle Retail application that owns this text resource.
- **Language** - This value identifies the language of the text resource.
- **Bundle** - This value identifies the bundle file where this text resource resides.
- **Resource** - This value is the unique name that can be used to get the text for this resource.
- **Base Text** - This value is the text provided by the Oracle Retail application. This is the text that will appear in the application by default.

Every text resource in Oracle Retail applications is uniquely identified by the combination of Application Code, Language, Bundle, and Resource.

A resource customization is a change that a retailer made to the text of a resource. In addition to the values above, customizations also have the following values.

- **Custom Text** - This is the custom text provided by the retailer for the resource.
- **Current Text (or Text)** - This is the text that will actually appear in the Oracle Retail application. If a retailer has provided custom text for the resource, then this value will display the retailer's custom text. Otherwise, it will display the base text provided by the Oracle Retail application.

Tasks

The Resource Bundles area of Retail Home consists of the following tasks.

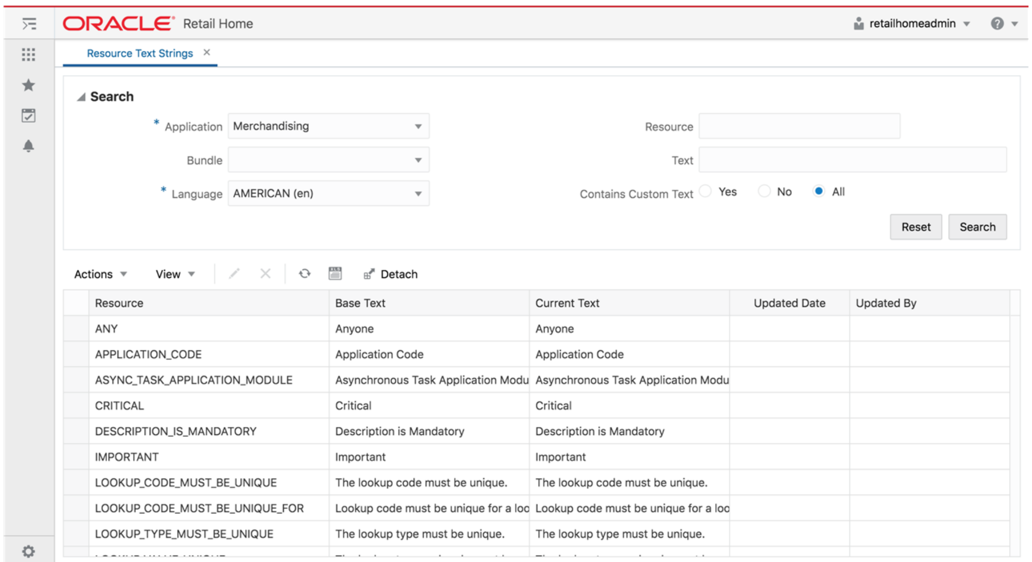
- Resource Text Strings

- Imports Management

Resource Text Strings

From the Retail Home Settings menu, a Retail Home admin user can access the Resource Text Strings link under the Resource Bundles submenu. The Resource Text Strings screen provides the capability to customize the resources present in the resource bundles of an application. The user can search the resources in an application using the Application, Bundle, Language, Resource, Text and Contains Custom Text fields.

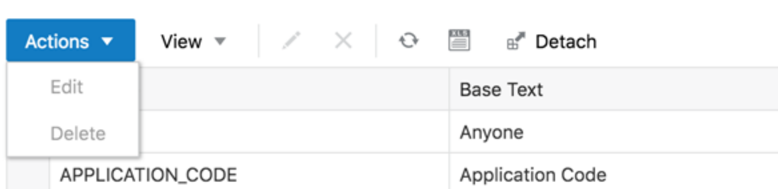
Figure 8–1 Resource Text Strings Screen



The results table in the Resource Text Strings screen will display the Resource, Base Text, Current Text, Updated Date, and Updated By columns for the resources matching the entered search criteria. If there is a custom value present for a resource, it will be displayed in the Current Text column along with the date and the user who customized that entry. If there is no custom value present for a resource, the Current Text column will display the base text and the Updated Date and Updated By columns will be displayed empty. The user can edit or remove custom text for a resource using this screen.

The user can also export the results table to an Excel CSV file, which can be modified and later imported through the Imports Management screen. The export and import actions allow the user to provide custom text for many resources at one time, and upload all the custom values in a single action in Retail Home.

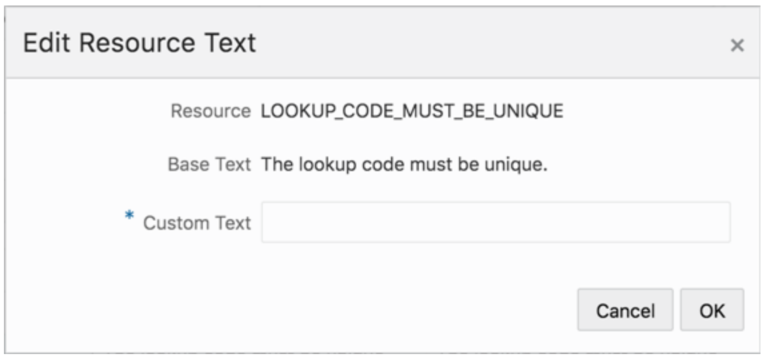
Figure 8–2 Edit or Remove Custom Text



Add or Edit

The user can add or edit the custom text for a resource using the Edit menu item or the pencil icon. If no custom text is present for a resource, a new custom text will be added. If a custom text is already present for a resource, it will be modified. The Updated Date and Updated By columns will be changed to reflect the addition or modification. The Edit option opens up a popup showing the resource, its base text and editable custom text. Only one record can be edited at a time in a popup.

Figure 8–3 Edit Resource Text



Remove Customization

The user can remove the custom text for one selected resource using the Delete menu item or the cross icon. The user can select a single record and remove the custom value for the record. The base text is not impacted by the Delete operation. Upon completion of the delete operation a snack bar notification is shown to the user. The user can either undo the delete action or dismiss the notification.

Figure 8–4 Delete Custom Text Snack Bar Notification

Export to CSV

The user can export the details of the resources from the results table to an Excel CSV file. When the user selects the Export to CSV action, the browser will perform its download behavior. Depending on the user's browser preferences, the browser may prompt the user asking whether the exported file should be opened or saved, what program should be used to open the file, or where on the user's computer the file should be saved.

Importing Customizations from a CSV File

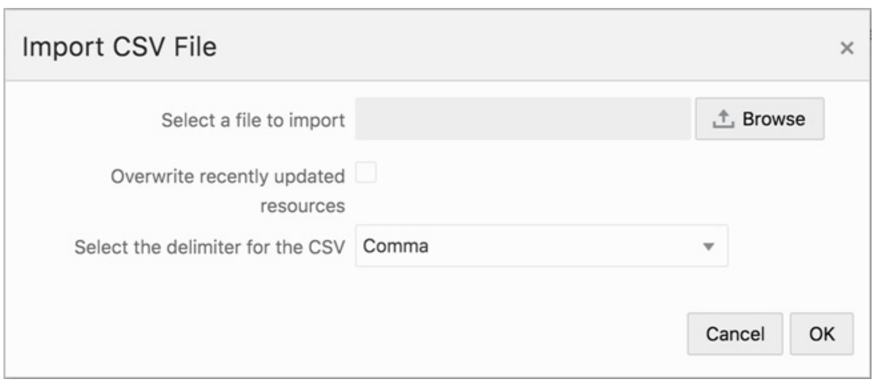
The user can change the values in the Text column of an exported CSV, and then import the CSV file through the Imports Management screen. See the section below titled Imports Management for more details about the Imports Management screen. When the user does this, the values of the Text column are imported into the custom text of each newly customized resource. The user can customize multiple rows with a single action by importing a file that contains multiple customized rows. Importing a file that has not been modified will do nothing, since the text for each resource is already exactly the same in the Oracle Retail application.

The imported file must meet the following requirements for the import to succeed:

- The imported file must be a well-formed CSV file. The user can use any compatible program to edit the exported CSV file, as long as the program is able to read the CSV file and save it again in CSV format.
- The user should only edit values in the Text column. If the user edits any of the values in the Base Application Code, Language, Bundle, or Resource columns, the import may fail, or invalid customizations may be created.
- The user can only add or edit customizations in the import. The user cannot remove customizations using import. Deleting the contents of the Text field or copying the Source Text into the Text field will cause the row to be ignored.
- The size of the imported file is limited to 2000 KB. Users will not be allowed to upload a file larger than this.

When the user selects the Import CSV file action, a popup opens prompting the user to select a file to import.

Figure 8–5 Import CSV File Dialog

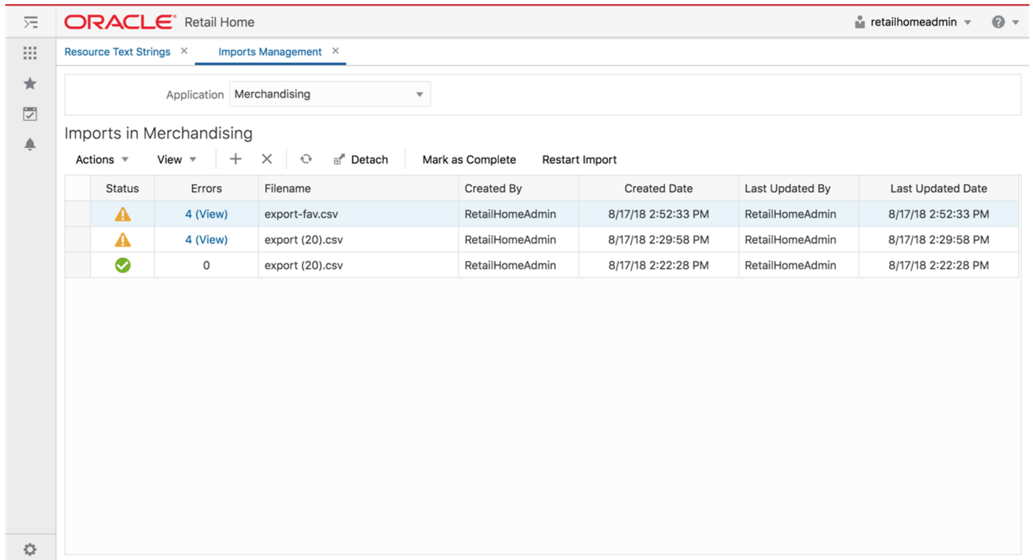


It is possible that, after a user exports resources to a CSV file, but before the user imports the file through Retail Home, another user may customize one or more of the exported resources. In this case, the values of resources in Retail Home would be newer than the values in the exported file. In order to ensure that an import does not inadvertently overwrite these values, the import action will skip resources that have been recently updated in Retail Home, and notify the user. The user can tell the import to instead use the values from the imported file by selecting the "Overwrite recently updated resources" checkbox on the import popup.

Imports Management

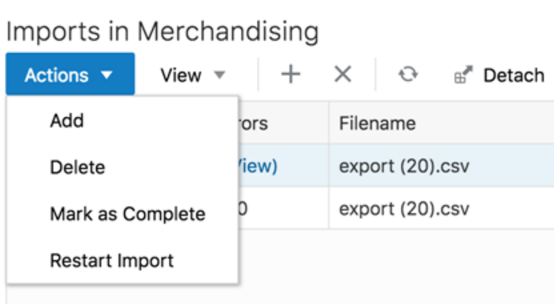
From the Retail Home Settings menu, a Retail Home admin user can access the Imports Management link under the Resource Bundles submenu. The Imports Management screen provides the ability to create, view and manage import actions, and to take action to resolve any issues encountered during an import.

Figure 8–6 Imports Management Screen



The Imports table will display information about each import that has been created for the currently selected application. The table will display the Status, Errors, File Name, Created By, Created Date, Last Updated By, and Last Updated Date. The user can create a new import, delete an import, mark an import as complete, restart an import, or view the errors for an import from this screen.

Figure 8–7 Imports Management Actions



Create

The user can import a CSV file from the Imports Management screen. See the section above titled Importing Customizations from a CSV File for more details.

Delete

The user can delete one or more imports. When the user deletes an import, that row is removed from the table completely, as well as any unresolved errors in the import. Any customizations that were already created by the import will still exist. The user cannot delete an import that is in "Pending" status. This is to make sure that an import is not deleted while it is being processed.

Note that there is no purge process for imports. All imports will remain in the database until manually deleted by the user.

Mark as Complete

The user can select an import that is in "Complete with Errors" status and change the status to "Complete" This indicates that the user has finished addressing errors with the import, and all outstanding errors should be dismissed.

Restart Import

After the user addresses any errors that were encountered when importing customizations, the user can restart the import to create customizations for the fixed resources.

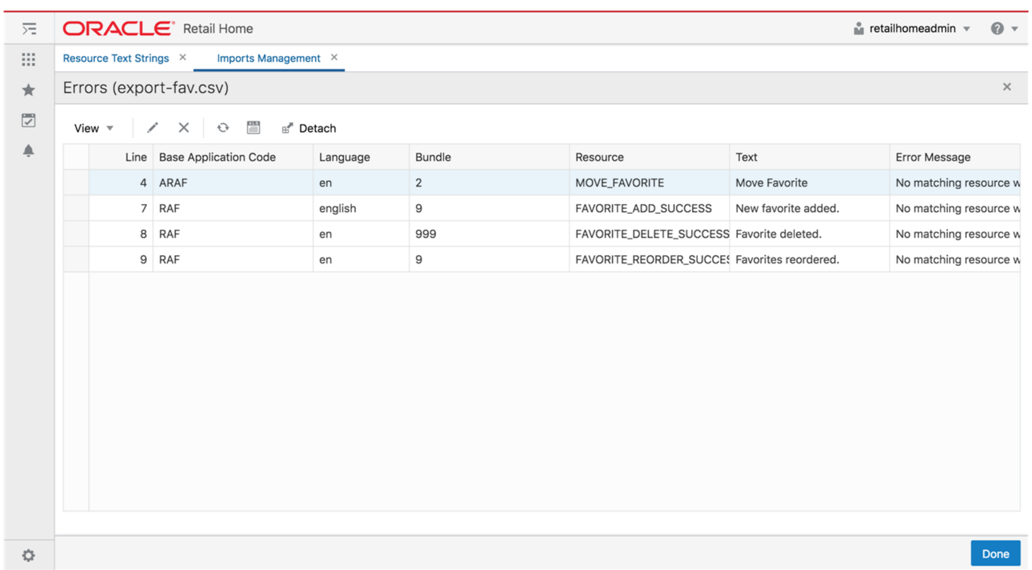
View

When an import on the Imports Management screen is marked with status "Complete with Errors," this means that the import encountered errors with one or more of the customizations in the imported file. In the table, the Errors column indicates the number of customizations that had errors. This number becomes a link that the user can click to view details for the customizations with errors. This takes the user to a modal page within Imports Management. See the section below titled View Errors for more details.

View Errors

The Import Errors screen allows the user to view the details of any errors encountered while importing customizations from a CSV file. The user can reach this screen via the Imports Management screen. See the View subsection within the Imports Management section above for more details.

Figure 8–8 View Errors Page

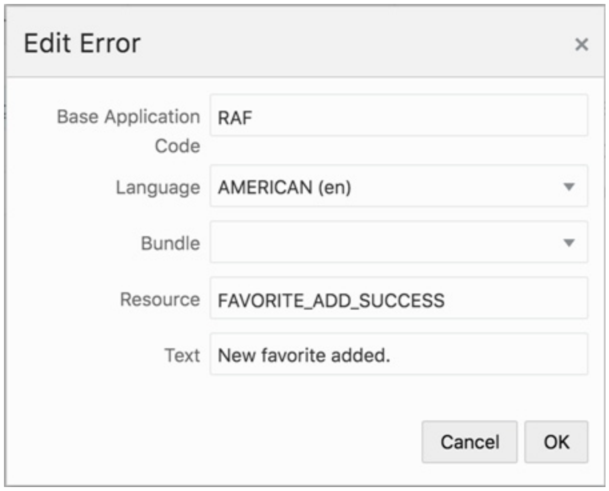


The Import Errors screen allows the user to view all imported customizations that encountered errors, as well the error message indicating why that customization could not be created. The Errors table displays Line Number, Base Application Code, Language, Bundle, Resource, Text, and Error Message. The user can edit or delete an imported customization, or Export to CSV.

Edit

The user can edit the selected imported customization in the Edit Error dialog. The Edit Error dialog supports edits to the Base Application Code, Language, Bundle, Resource, and Text columns. This allows the user to resolve cases where a customization does not identify an existing resource, or cases where two or more customizations identify the same resource.

Figure 8–9 Edit Error Dialog



Delete

The user can delete an imported customization. The imported record is removed from the errors table, and no customization is created.

Export to CSV

The user can export the contents of the Errors table back to a CSV file, fix any errors in the CSV, and re-import the file. In this case, the user would generally want to return to the Imports Management screen and mark the first import as complete, since the errors were fixed by creating a new import.

Important Considerations While Customizing Resources

When customizing resources:

- When customizing a resource text, consider the length of the custom text compared to the base text. Some of the labels and messages may not look good on the page if the custom text is too long compared to the base text.
- After customizing the resource text, the changes may not be immediately visible in the application if the application uses a resource bundle cache. If the application is using a resource bundle cache, the customized resources are visible in the application only after the resource bundle cache expires. Please refer to the application documentation for the cache expiry time.