Oracle® Retail Home

User Guide

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Send Us Your Comments

Oracle Retail Home User Guide, Release 19.0.001.9

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

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

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

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

> **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 document describes the Product user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This document is for users and administrators of Oracle Retail Product. This includes merchandisers, buyers, business analysts, and administrative personnel.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit 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 Home Release 19.0.001.9 documentation set:

- *Oracle Retail Home Security Guide*
- *Oracle Retail Home Administration 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, 13.1) or a later patch release (for example, 13.1.2). 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:

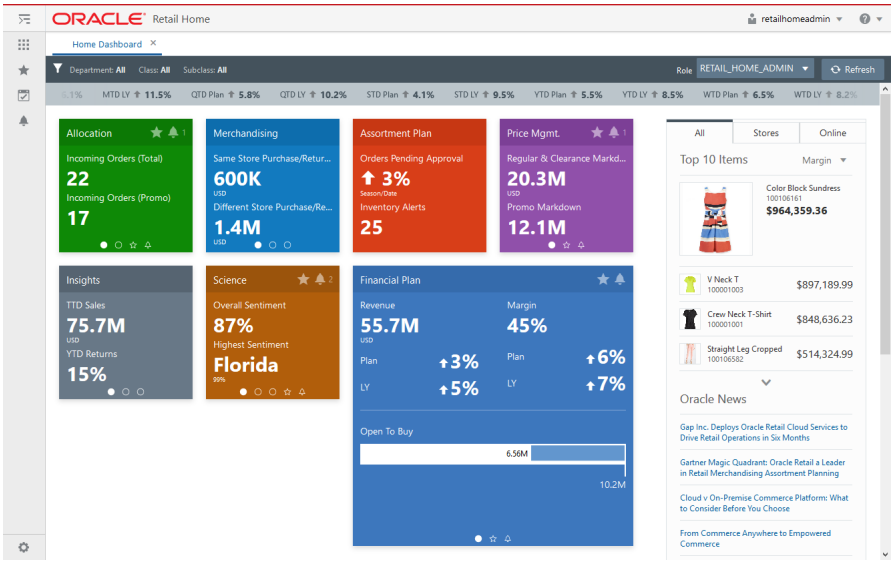
Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates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

1

Home Dashboard

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

Figure 1–1 Home Dashboard



Retail Home Dashboard

The user can access the Retail Home dashboard via the Tasks menu. To access the dashboard, click Home Dashboard in the task menu.

Dashboard Controls

The user can see a set of controls at the top of the dashboard. On this bar, the user can see and select their current profile, apply or remove filters, and refresh the data on the dashboard.

Figure 1–2 Dashboard Controls

Profiles

Profiles define what information a user sees on the dashboard. The selected profile determines which tiles appear on the dashboard, and which reports, if any, appears in the banner and contextual area. Profiles must be configured by an administrator before the user will see any content on their dashboard.

Users who have more than one profile can switch between the profiles that are assigned to them. To see the list of assigned profiles, click on the Role LOV near the end of the banner.

Filters

If any filters have been configured, the user will see them on the banner. If the user selects a value for a filter, any related metrics and reports that appear in tiles or the contextual area will update based on the selected filter.

Refresh

The user can refresh their dashboards using the refresh button.

Banner

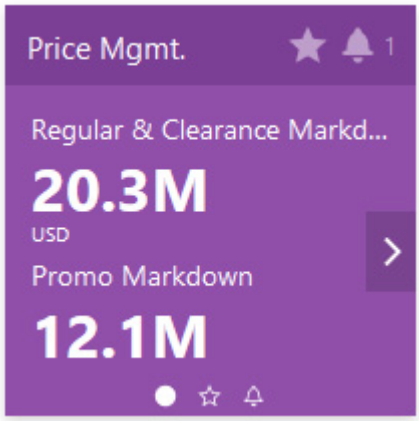
The current profile may be configured to display report metrics in the banner area directly below the dashboard controls.

Figure 1–3 Dashboard Banner

Tiles

The main area of the dashboard contains a collection of tiles. A tile may correspond to an application, link, or other source of information which the user can access. Inside a tile, the user may find at-a-glance information such as metrics, reports, user notifications, links, or other relevant content, depending on how the tile was configured.

Figure 1–4 Dashboard Tile



Each tile may have multiple pages of content. The user has several options to move between pages of content.

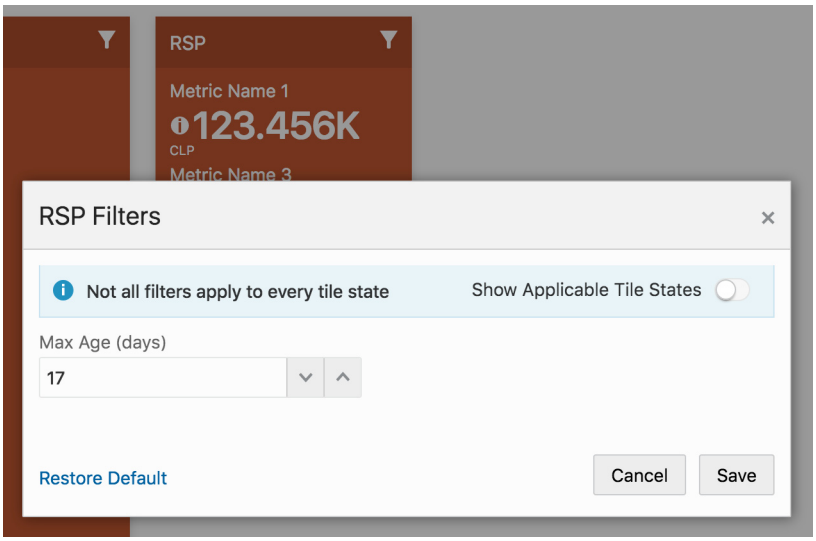
First, RGBU enterprise application tiles that have been configured to support favorites and notifications will display a favorites and notifications icon in the tile header.

Second, when the user hovers a tile, previous and next arrows will appear on the sides of the tile. By clicking these arrows, the user will move to the corresponding page in the tile.

Third, at the bottom of the tile, the user can see a row of icons corresponding to each page in the tile, where the current page's icon filled in. The user can click any of these icons to go directly to that page within the tile.

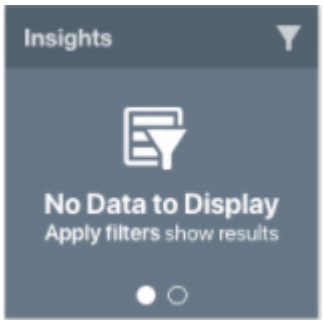
Fourth, tiles may be configured to support filter options specified by the user. Pressing the filter icon in the upper-right corner of the tile will open the filter dialog to provide values to filter data by:

Figure 1–5 Filter Dialog for a Tile



When dashboard tiles are initially loaded, if required filters do not have values entered, the following message is displayed for the corresponding tile page.

Figure 1–6 No Data to Display



The user will have to click on the filter icon to enter the required filter values before tile page can be rendered with content.

Contextual Area

In addition to tiles and the banner, a profile may include reports that display additional information to the user in the contextual area, which the user can find next to the main area.

2

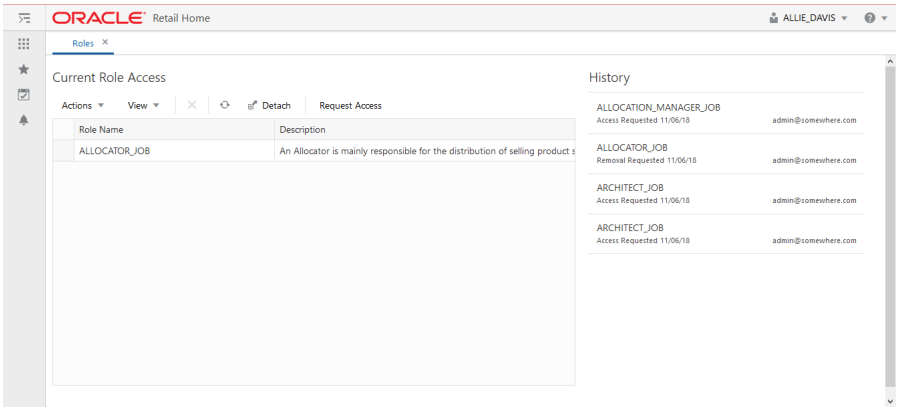
Requesting Role Access

In RGBU enterprise applications, roles are used to determine which applications, data, and actions the user has access to. Retail Home provides users with a screen to request access to new roles, as well as request that roles be removed from their access.

Role Request

The user can access the Role Requests screen in Retail Home via the tasks menu. To access the Role Requests screen, click Roles in the tasks menu. The Role Requests screen is shown in the diagram below.

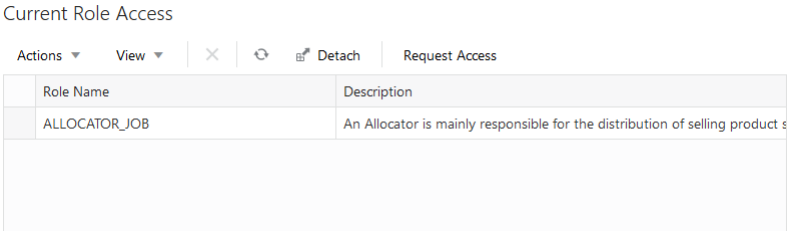
Figure 2–1 Role Request Screen



Current Role Access

On the screen, the user will see a table labeled Current Role Access (see below.) This table lists all of the roles currently assigned to the user, along with a description of each role.

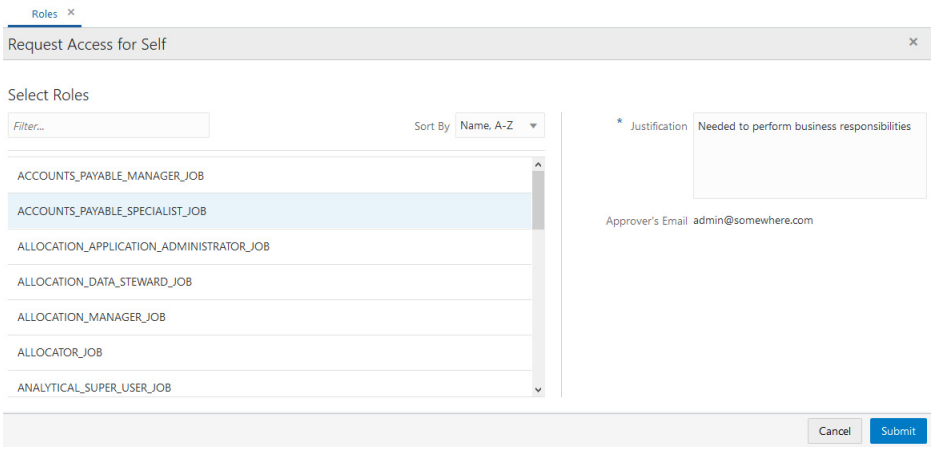
Figure 2–2 Current Role Access



Requesting Access

To request access to a new role, the user must select the Request Access button on the table's toolbar, or select the table's Actions menu and then select the Request Access item from the menu.

Figure 2–3 Requesting Access



After doing this, the user will see the Request Access for Self form, shown above.

Here, the user can search, filter, and select the roles they want to access. To find a specific role, the user may change the sort order between "Name, A-Z" and "Name, Z-A". The user may also enter part or all of the role's name into the filter input box, which will filter the results to only those roles with names that contain the filter text.

The user may select one or more roles from this list.

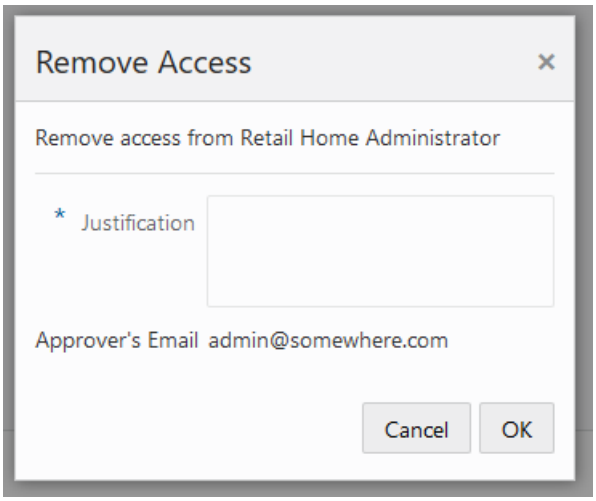
After selecting roles, the user must provide some business justification for the request in the Justification field. Below the Justification field, the user will also see the Approver's Email who will be responsible for handling their request.

Finally, the user may select the Submit button when they have finished filling out the request. A request will be submitted for each selected role. The user may also select Cancel at any time if they do not want to submit the request.

Removing Access

To request to remove access to a role in the Current Role Access table, the user must first select the role in the table. Then, the user must select the delete icon button on the table's toolbar, or select the table's Actions menu and then select the Remove Access item from the menu.

Figure 2–4 Remove Access



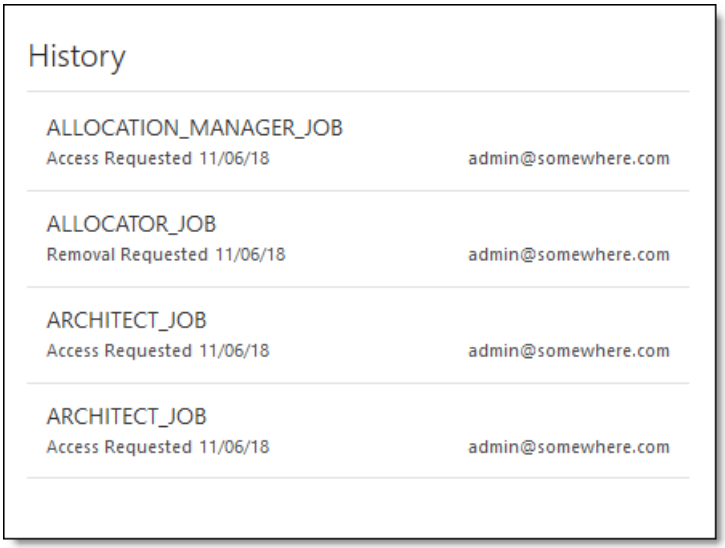
After doing this, the user will see the Remove Access prompt, shown above.

Similar to requesting access, the user will be prompted for justification for the request, and will see the Approver's Email.

Request History

On the Role Requests screen, the user will also see their History of requests and removals.

Figure 2–5 Request History



For each item in the history, the user can see which role was requested, whether they requested to access or remove access to the role, the date that the request was made, and the email address of the approver who is responsible for handling their request.