

Oracle® Retail Merchandising Cloud Suite
Customization and Extension Guide
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Oracle Retail Merchandising Cloud Suite, Customization and Extension Guide, Release 19.0

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Preface

The Oracle Retail Merchandising Customization and Extension Guide contains the requirements and procedures that are necessary for the retailer to extend and customize the Merchandising applications.

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- Exact error message received
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If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Retail Documentation on the Oracle Help Center

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

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

Conventions

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

This is a code sample

It is used to display examples of code

Note: In the images or examples below, user details / company name / address / email / telephone number represent a fictitious sample. Any similarity to actual persons, living or dead, is purely coincidental and not intended in any manner.

Overview

This document provides an overview of tools and options provided in the Merchandising Cloud Service suite for customizing or configuring the solutions to meet your business. The solutions covered in the scope of this document include:

Functional Name	Cloud Service
Merchandising	Oracle Retail Merchandising Foundation Cloud Service - Merchandising module
Sales Audit	Oracle Retail Merchandising Foundation Cloud Service - Sales Audit module
Trade Management	Oracle Retail Merchandising Foundation Cloud Service - Trade Management module
Pricing	Oracle Retail Pricing Cloud Service (RPCS)
Allocation	Oracle Retail Allocation Cloud Service (RACS)
Invoice Matching	Oracle Retail Invoice Matching Cloud Service (ReIMCS)

The Merchandising suite is considered closed source code. This means that the ability to customize or extend the solutions is limited, however the solutions do provide some options. This section will describe how to leverage these capabilities.

Common Use Cases

Some of the most common use cases for customizing or extending the Merchandising solutions are to

- Make additional attributes available in a workflow
- Add custom reports to existing dashboards
- Add a custom dashboard
- Create a bolt-on application to accomplish a certain task

Add Attributes to a Workflow

If you would like visibility to additional attributes to assist your users in decision-making while using the Merchandising solutions, the easiest way to provide this information is to create a small report and display it in the contextual pane of the applicable workflow. This can be used for base attributes, as well as any attributes added using the [Custom Flex Attribute](#) functionality or even attribution from an external source. If you want to use base product or flex attributes to display the attributes based on live production data, then you'll need to use [BI Publisher](#) to create the report. If you want to use external data sources, have more complex calculations that are required for your report, or wish to use a different technology, then any URL-based report can be used. For more on how to configure contextual reports, see the section below titled [Contextual Reports](#). Regardless of the technology used, you can follow the [Merchandising Style Guide](#) to get a similar look and feel for your report to what is used elsewhere in the applications.

Add Custom Dashboard Reports

Merchandising solutions provide a number of dashboard reports as part of the base solution. The platform allows you to turn base reports off and on, re-order them on a dashboard, or even have them appear on other dashboards. There are also a number of configuration options for the base dashboard reports. The details on configuring the order or adding and removing base reports is described below in the [Dashboards](#) section. Also in this section, it describes how to configure a custom report in the base dashboards. Like the contextual reports described above, dashboard reports can be written in BI Publisher against the live production data, or can use any URL-based report built in [BI Publisher](#) or other technologies that are based on other data sources. Regardless of the technology used, you can follow the [Merchandising Style Guide](#) to get a similar look and feel for your report to what is used elsewhere in the applications.

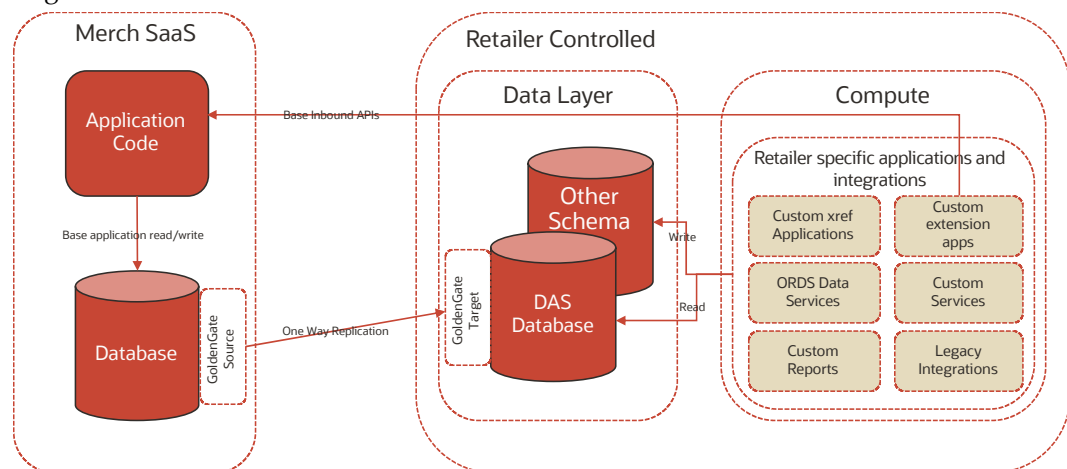
Add a Custom Dashboard

If you have a need to create a new dashboard outside of the base-provided dashboards, this can be created in an external technology and linked into the [Reports menu](#) using the platform configurations. This will make it look to users like the other dashboards. However, it should be noted that when this dashboard is launched, it will result in a new window or tab in the browser being opened.

Create a Bolt-on Application

If your business requires a custom process that cannot be accomplished in the Merchandising screens, you can build a bolt-on application leveraging the Merchandising library of web services and other APIs that allow it to interact with the Merchandising solutions. If you require data that is not available in one of these services or APIs, then because the database and application server cannot be accessed directly, you may also want to use the Data Access Schema (DAS) in order to access some of the data. DAS is a one-way, near real-time replication of data. The target environment would live in an on-premise or PaaS environment, which could also be used to host the custom application.

If you use this as part of your implementation, you can use the data in the read-only replicated data in the target environment to create your own query web services or as the basis for your custom application. The diagram below shows an example of how this might look.



This document will show how to leverage the application framework to connect your bolt-on application to the Merchandising solutions for a more seamless experience for your users. Key sections to review for this type of customization are:

- **User Interface - Tasks Menu** Provides directions on how to add a task to the Tasks menu for user access to the bolt-on workflow
- **In Context Launch** Provides options for configuring your custom task flow to launch a Merchandising workflow in-context. For example, providing a link from your workflow into the Merchandising Item workflow for the user to view or edit details on an item.
- **Merchandising Style Guide** Provides information on some of the key formatting used in Merchandising workflows that could be used in your custom application to give it a similar look and feel.
- **UI Platform Services** Some of the features, such as Notifications and Favorites, are common across the Merchandising solutions are part of the common platform that the solutions share. You may want utilize some of these features in your custom bolt-on application to complete a workflow or for a common look and feel.
- **Batch Schedule Integration** If your custom application requires the running of some batch processes that must be coordinated with the Merchandising batch processes, you can leverage the integration with POM (Process Orchestration and Monitoring), the Merchandising cloud service scheduler. For more information on this feature, see the External System Configuration chapter in the *Oracle Retail Process Orchestration and Monitoring User Guide*.

Custom Flex Attributes

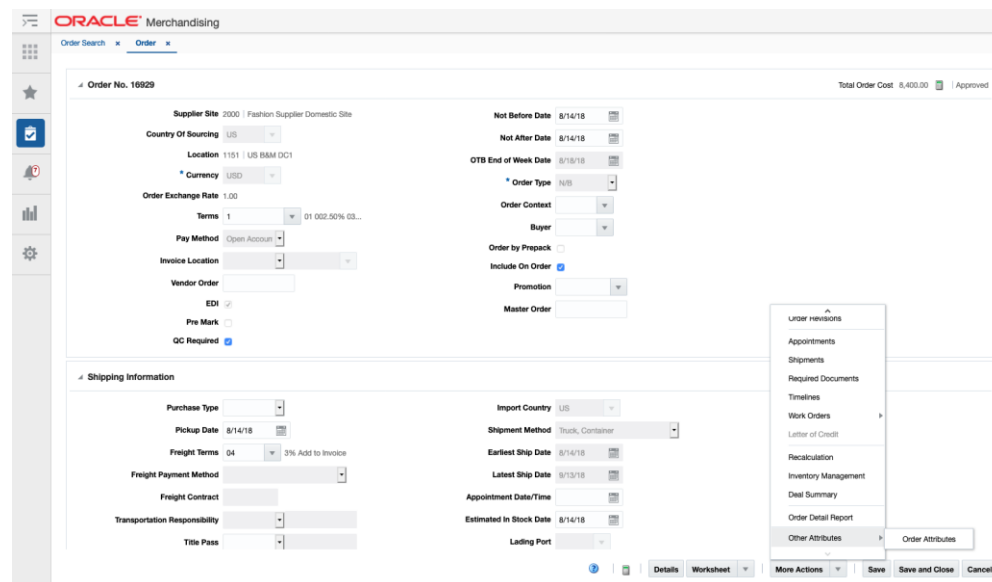
Custom Flex Attribute Solution (CFAS) is a metadata driven framework that enables you to set up additional attributes on pre-enabled Merchandising entities without modifying base code.

The CFAS framework enables you to extend Merchandising entities to account for attributes that you require for your business, such as to support reporting or integration requirements. The entities that support flex attributes are:

Entity	Table Name
Address	ADDR
Class	CLASS
Cost Changes	COST_SUSP_SUP_HEAD
Cost Components	ELC_COMP
Deals	DEAL_HEAD
Department	DEPS
Diff Types	DIFF_TYPE
Item	ITEM_MASTER
Item Location	ITEM_LOC
Item Supplier	ITEM_SUPPLIER
Item Supplier Country	ITEM_SUPP_COUNTRY
Item Supplier Country Location	ITEM_SUPP_COUNTRY_LOC
Purchase Order	ORDHEAD ORDSKU ORDLOC
Partners	PARTNER
Return to Vendor	RTV_HEAD
Store	STORE
Suppliers	SUPS
Transfers	TSFHEAD
VAT Codes	VAT_CODES
Warehouses (physical and virtual)	WH

Once enabled for an entity, the flex attributes can be accessed using the More Actions menu in the relevant entity screen. The following figure illustrates how the option is displayed to users when attributes have been activated for purchase orders. The label displayed in the More Actions menu, in this case “Order Attributes”, is also part of the CFAS configuration. The attribute screens do not have special security associated with them. If a user can edit the main entity screen, they will also be able to edit the flex attributes associated with the entity.

Illustration of a CFAS User Interface on Item Maintenance screen



In addition to managing the flex attributes in the Merchandising UI, these attributes can also be included on inbound integration if the source of the information is another application. And they are also published outbound so that they can be communicated to other dependent solutions.

Note: When an entity record is deleted, the related CFAS attributes associated with that entity will also be deleted.

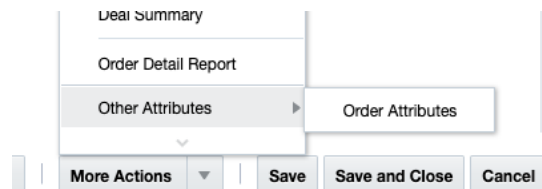
Defining Custom Flex Attributes

This chapter describes how flex attributes are organized so that you can plan for the best way to use the functionality to support your business and users. For example, it will be important to group together attributes that are being maintained by the same users. You should also consider structuring your attributes in such a way that you add more in the future as your business changes.

To help with the organization of attributes, a hierarchy is used, which consists of three levels: group set, group, and attribute. Group set is the name of the page, when the attribute screen is opened. Group level is shown as a container on the page, containing the attributes.

Group Sets

Group set is the highest level of the CFAS hierarchy. This is the level that is displayed in the Other Attributes menu where the attributes are accessed for each entity.



For each entity, you can define up to 99 attribute group sets. For each group set, you must define the following:

- **Display Order** - The order in which the attribute group set will appear in the More Actions menu of the relevant entity.
- **View Name** - The name that will be used for the database view that will be created for this group set. A view is a required information for each group set and is used for querying the data in Merchandising, as well as for integration from and to external solutions.
- **Staging Table Name** - The name that will be used for the staging table that will be created for this group set. Although staging table information is optional, it is recommended that you provide staging table name to support data loading from integrated systems. Each group set can have one staging table.
- **Labels** - Sets the business name for the group set. The label is the title that will appear in the Option menu for the entity when the attribute group set is accessed. You must set at least one label for the primary language for each group set you create. You can choose to create labels for more (alternate) languages, based on your business need.

Groups

Once you determine the attribute group sets needed for each entity, the next step is to determine how the attributes will be organized within these sets. The attributes themselves are organized into groups, which is the middle layer of the hierarchy.

Although you can create as many attribute groups as you want for each group set, you can only have 25 attributes in each attribute group.

When planning the attribute groups, in order to properly validate and display the information in the screens, you must determine the following in addition to the attributes themselves:

- **Display Order** - The order in which the attribute group set will appear in the Flex Attribute screen menu of the relevant entity.
- **View Name** - The name that will be used for the database view that will be created for this group. Similar to the view defined at the group set level, this view will contain all attributes in the group. A view is a required information for each group and is used to facilitate querying attribute information for the group.
- **Labels** - Sets the business name for the group and will be the name that appears on the screen. You must set at least one label for the primary language for each group set you create. You can choose to create labels for more (alternate) languages based on your business need.

Managing Entities, Group Sets and Groups

To add, update, or remove CFAS group sets or groups, select the template type of Administration from the Download Data screen and then the template Custom Flex Attribute Foundation. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice. There will be several tabs in the workbook that is generated that is used for managing the configuration of entities, group sets, and groups.

Note: The Entity tab in this spreadsheet is for visibility only. New entities cannot be added and custom validation functions are not supported in a SaaS implementation.

Add a Group Set

To add a group set, select the action type of Create in an empty row in the CFA Group Sets tab in the workbook. Next, enter a unique number of up to 10 digits as the Group Set ID. Then, select the RMS base table name where the group set will be associated, the order you want it displayed in the Merchandising UI, and define the name you want to use for the view and staging tables that will be created for the group set when activated. The view and staging table names can be up to 30 characters in length. The columns for Qualifier Function, Validation Function, and Default Function should be left blank, as this functionality is not supported for SaaS implementations.

For each group set created, you will also need to define at least one label in your primary language. To do this, navigate to the CFA Group Set Labels tab in the workbook. In a blank row in the worksheet, select an action type of Create and then enter the group set ID you used for your group set. Then, select your primary language configured in Merchandising and enter the label name you want used in the Label field. You can create labels of up to 255 characters, but it is recommended to try not to exceed 60 characters for best display in the Merchandising screens. Repeat this process for all languages you require for your users.

Add a Group

To add a group, select the action type of Create in an empty row in the CFA Groups tab in the workbook. Next, enter a unique number of up to 10 digits as the Group ID. Then, select the group set where the group will be associated, the order you want it displayed in the Merchandising UI, and define the name you want to use for the view that will be

created for the group when activated. The view name can be up to 30 characters in length.

For each group created, you will also need to define at least one label in your primary language. To do this, navigate to the CFA Group Labels tab in the workbook. In a blank row in the worksheet, select an action type of Create and then enter the group ID you used for your group. Then, select your primary language configured in Merchandising and enter the label name you want used in the Label field. You can create labels of up to 255 characters, but it is recommended to try not to exceed 60 characters for best display in the Merchandising screens. Repeat this process for all languages you require for your users.

Modify an Entity, Group Set, or Group

If you would like to update any details for an entity, group set, group, or record group, a similar process will be followed as that described above for creating new. First, download the spreadsheet, and then navigate to the tab where you would like to make your updates. In the tab where you are going to make your updates, select the action type of Update, and then correct the value in the spreadsheet. The following columns can be updated in each tab:

- CFA Group Sets – Display Order; also, Group Set View Name and Staging Table Name prior to attributes being activated for the group set.
- CFA Group Set Labels – Label
- CFA Groups – Display Order; also, Group View Name prior to attributes being activated for the group.
- CFA Group Labels - Label

Note: Once attributes are active, the data that can be updated for each of these areas is limited to the following: labels and display order

Delete a Group Set

If you wish to remove a group set, navigate to the CFA Group Set tab in the spreadsheet and select the Delete action on the row of the group set, you wish to delete. You must also remove all labels that have been associated with that group set in the CFA Group Set Labels tab, by selecting the Delete action in the row associated with those labels. Group sets cannot be deleted if the attributes in the group set have been activated, however labels can be removed at any time.

Group sets cannot be deleted if they are active.

Delete a Group

If you wish to remove a group, navigate to the CFA Groups tab in the spreadsheet and select the Delete action on the row of the group, you wish to delete. You must also remove all labels that have been associated with that group in the CFA Group Labels tab, by selecting the Delete action in the row associated with those labels. Groups cannot be deleted if the attributes in the group have been activated, however labels can be removed at any time.

Groups cannot be deleted if they are active.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and

select Foundation Data > Upload Foundation Data from the main task list. In this screen, you'll again select the template type Administration and the template Custom Flex Attribute Foundation. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list.

See also the *Oracle Retail Merchandising Do the Basics User Guide* section on Download/Upload Data from Spreadsheets for more information.

Attributes

Attributes are the bottom layer of the hierarchy. As mentioned above, you can have 25 attributes per group. Of those 25 attributes, up to 10 can be character-based attributes, up to 10 can be number-based attributes, and up to 5 can be date attributes. You should consider this limit when planning the attributes to be included in each group.

The screenshot displays the Oracle Merchandising interface for defining custom flex attributes. The main area shows a table of attributes for the 'Order Attributes' group. The table has the following data:

Group	View Column Name	Display Order	Data Type	Widget Type	Maximum Length	Required	Enabled	Active
Order Attributes	SEASON	1	NUMBER	List of Values	5	—	✓	✓
Order Attributes	COLLECTION	2	NUMBER	List of Values	5	—	✓	✓
Order Attributes	ON_FLOOR_DATE	3	DATE	Date	—	—	✓	✓
Order Attributes	TICKETS_SENT	4	VARCHAR2	Check Box	1	—	✓	✓
Order Attributes	TICKETING_PARTNER	5	NUMBER	List of Values	5	—	✓	✓

Below the attributes table, there is a 'Labels' section with a table for Label and Language:

Label	Language
Season	English

To start specifying attributes, enter the entity you want to add the attributes to in the Application Table field, and then select the group set you previously created, then click **Display Attributes**. Next, select the Add option in the Actions menu or select the iconic button to begin adding attributes.

When creating attributes, you'll need to specify the following:

View Column Name - this value will be used to define the name of the attribute in the group set and group level views, as well as the group set level staging table.

Label - you will be required to add at least one label for the attribute in the primary language. But, labels for other languages can also be added.

Display Order - Indicates the order in which the attributes will appear in the attribute screen, from top to bottom. Attributes will appear in a single column on the screen.

Maximum Length - Indicates the maximum number of digits or characters that are allowed in the attribute, as well as the width of the attribute on the screen. You must specify this information for the attributes with Number or Varchar data types. This may not apply when you choose a List Item or Check box as the widget type. The maximum length for the List Item widget type is automatically set to 6 and the maximum length for the Check box widget type is automatically set to 1. For attributes with Number data type, you must enter the full length of the number. This includes the length to be allowed after the decimal point and positive/negative sign (if negative numbers are allowed). For example, if a particular attribute needs to allow for five digits with up to two digits after the decimal point and allow negative integers, you will need to specify the length as 9 (1 character for positive/negative sign, 5 digits before the decimal point, 1 decimal point, and 2 digits after the decimal point).

Note: If you choose a record group, the maximum length will be automatically selected based on the value in the first column of the record group query.

Minimum/Maximum Value Allowed - Optional and applies to attributes with Number or Date data types. Indicates the minimum and maximum numeric or date value that can be entered for the attribute. For date widgets, the minimum and maximum definition is the number of days.

For example, if an attribute was added for an item that was Ecommerce Launch Date and the attribute was set like this:

- Lowest Allowed Val: 0
- Highest Allowed Val: 10

If the current VDATE is 12-SEP, then the min/max setup would not allow this attribute to be earlier than 12-SEP or greater than 22-SEP.

Data Type - Indicates the type of data for the attribute. You can set this as a Number, Varchar, or Date.

Widget Type - Indicates the type of the field that will appear for the attribute. You can select one of the following options:

- Text Item - used for both Number and Varchar data types. When used, the attributes field will appear as a text box on the screen.
- List of Values (LOV) - used for the Varchar data types only. A list of values appears as combo box LOV. If you choose to use this widget type, you must also specify a [record group](#).
- List Item - used for the Varchar data type only. When used, the attributes field will appear as a select one choice dropdown on the screen. If you choose to use this widget type, you must also specify a code type in the List Item Code Type field. The valid codes types are those that exist on the Codes and Descriptions table in Merchandising. For more information on Codes and Descriptions, see the *Oracle Retail Merchandising Implementation Guide*.
- Check box - used for Varchar data type only. When used, the attributes field will appear as a check box on the screen.
- Date - used for Date data type only. When used, the attributes field will appear with the calendar icon to allow users to select dates.

Required - Indicates whether the attribute will be considered as a mandatory field. Once an attribute is activated, it is recommended that you avoid changing this information.

Wrap Text - used for data type of VARCHAR and widget type Text Item, this may be used if you expect to have longer than usual text entered for your text item and want the widget to support wrapping text on the screen.

Enabled - Indicates whether the attribute appear as enabled or disabled (greyed out); only enabled attributes can be updated in the attribute screen. For attributes where you want the users to enter information, you must set them as enabled. For attributes that will display a default value (using a default function at the group set level), you will need to set them as disabled.

Validation Functions - this is not supported for SaaS implementations, so should always be left blank.

Once you have specified the attributes to be added, you can choose the View UI button to see an example of what the attributes will look like once they are activated. If needed, make any changes to display order, labels, and so on. When you are ready to activate the attributes, which will make them visible to users, click the **Activate** button. This also generate the views at the group set and group level as you have defined them.

Managing Record Groups

To add, update, or remove record groups, select the template type of Administration from the Download Data screen and then the template Custom Flex Attribute Foundation. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice. There will be two tabs in the workbook that is generated that is used for managing the configuration of record groups.

Add a Record Group

If you plan to add any attributes that are of type List of Values, then you will need to define a record group as part of the configuration. To add a record group, select the action type of Create in an empty row in the CFA Record Groups tab in the workbook. Next, enter a unique number of up to 10 digits in the Record Group column and enter a name in the Record Group Name column of up to 30 characters in your configured primary language. Next, you'll choose the query type of either simple or complex. A simple query will be generated systematically based on the addition of attributes in the spreadsheet. Whereas a complex query can include more conditions and must be defined outside this worksheet.

Note that in a **cloud service implementation**, only the simple query type is supported. For simple queries, you'll need to include the following information:

- **Table Name** – the table against which the record group query will execute; this must be a valid table name in the Merchandising schema - for example, UDA_VALUES. This can be up to 30 characters in length.
- **Value Column** – this will be part of the generated select statement in the record group that will return an entity ID; it is usually the primary key of the table specified in the Table Name column (for example, UDA_VALUE). This can be up to 30 characters in length.
- **Description Column** – this will be part of the generated select statement in the record group that will return a description that corresponds to the value column; it is usually the description of the entity as defined in the table name (for example, UDA_VALUE_DESC). This can be up to 30 characters in length.
- **Column 1** – the three values here will be used to generate a where clause if you want the record group to return only a subset of the table. This is optional for all simple queries, but if one value is defined for column 1, then all three must be defined.
 - **Where** – column name that should be used to limit the values returned (for example, UDA_ID). This can be up to 30 characters in length.
 - **Operator** – valid values are !=, <, <=, =, >, >=, is NULL, or is not NULL
 - **Condition** – indicates the condition that will limit the results. For the UDA example, this may be the specific UDA ID that should be returned. This can be up to 120 characters in length.
- **Column 2** – this is optional for all simple queries, but if one value is defined for column 2, then all three of where, operator, and condition must be defined.

For complex record groups, you will need to insert the query you want direction into the CFA_RECORD_GROUP table in Merchandising. So, the columns listed above are not required.

For each record group created, you will also need to define at least one set of labels in your primary language. To do this, navigate to the CFA Record Group Labels tab in the workbook. In a blank row in the worksheet, select an action type of Create and then enter the record group ID you used for your record group.

Then, select your primary language configured in Merchandising and enter the label names you want used in the LOV Title, Value Column, and Desc Column Header fields. You can create labels of up to 255 characters, but it is recommended to try not to exceed 60 characters for best display in the Merchandising screens. Repeat this process for all languages you require for your users.

Modify a Record Group

If you would like to update any details for an entity, group set, group, or record group, a similar process will be followed as that described above for creating new. First, download the spreadsheet, and then navigate to the tab where you would like to make your updates. In the tab where you are going to make your updates, select the action type of Update, and then correct the value in the spreadsheet. The following columns can be updated in each tab:

- CFA Entity – add a custom function in the Validation Function column using the full package function name (package_name.function_name)
- CFA Group Sets – Display Order, Qualifier Function, Validation Function, and Default Function; also, Group Set View Name and Staging Table Name prior to attributes being activated for the group set.
- CFA Group Set Labels – Label
- CFA Groups – Display Order; also, Group View Name prior to attributes being activated for the group.
- CFA Group Labels - Label
- CFA Record Groups – no changes can be made once the attribute using this record group is active; prior to activation, the following columns are editable: Record Group Name, Query Type, Table Name, Value Column, Description Column, Where Column 1, Operator 1, Condition 1, Where Column 2, Operator 2, Condition 2
- CFA Record Group Labels – LOV Title, Value Column, Desc Column Header

Note: Once attributes are active, the data that can be updated for each of these areas is limited to the following: labels, display order, and custom functions. For custom functions, the changes will be applicable going forward for editing or creating data in the impacted entity. It will not revalidate all the data that was previously created.

Delete a Record Group

If you wish to remove a record group, navigate to the CFA Record Groups tab in the spreadsheet and select the Delete action on the row of the record group, you wish to delete. You must also remove all labels that have been associated with that record group in the CFA Record Group Labels tab, by selecting the Delete action in the row associated with those labels. Record groups cannot be deleted if the attribute using the record group has been activated, however labels can be removed at any time.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, you'll again select the template type Administration and the template Custom Flex Attribute Foundation. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the Foundation Data > Review Status task from the main task list.

See also the *Oracle Retail Merchandising Do the Basics User Guide* section on Download/Upload Data from Spreadsheets for more information.

Using Custom Flex Attributes

Flex attributes are not used in any base processing, but they can be included in custom reports, or integrated to other solutions. When querying flex attributes, it is recommended that you use the views at the group set or group level, so that the queries can be built more like for other tables. The views are automatically generated when the attributes are activated.

For integration, the flex attributes will also be automatically made available in inbound and outbound integration when they are activated. This is done slightly differently based on the method of integration.

For message-based integration via the Oracle Retail Integration Bus (RIB) and bulk data integration (BDI), attributes are published as name-value pairs based on the column name defined at the attribute level. This is true for outbound and inbound.

For spreadsheet upload and bulk loads that use those templates, the CFAS extension tables can also be enabled for addition to the templates. For entities like item and PO, where there is the ability to create your own templates, you will have the option to manually add the CFAS extension tables to your customized templates using the view name defined at the group set level. For other entities, like diff types, where customization of templates isn't supported, the flex attributes are added automatically to the template when activated. For more information on customizing spreadsheet upload templates, see the Configure Spreadsheet Download/Upload section in the *Oracle Retail Merchandising Implementation Guide*.

Note: Deals Upload does not support uploading flex attributes. If you add attributes at that level, they can only be managed in the Merchandising UI.

In Context Launch

Merchandising solutions expose select task flows that you can directly access from external solutions using a specific URL, custom reports, and so on. This feature is referred to as in-context launch because, as part of the URL, parameters for the workflow are passed in to open a page displaying information related to those parameters. For example, the Item task flow in Merchandising could be called for a specific item ID. The requested task flow will be displayed in a new browser window or tab, depending on the specified target of the URL.

Merchandising

Item Header

When this page is launched, Merchandising will display the information for the item included in the URL in either view or edit mode.

URL:

`http://<hostname>/Rms/faces/RmsHome?pmItem=<item>&pmMode=<mode>&navModelItemId=MaintainItemFlowExt`

Parameters:

Parameter	Required	Description
Item	Yes	Item ID
Mode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Order Search

When this page is launched, Merchandising will display the search results based on the hierarchy values sent in the URL. One or more departments can be sent, or a single department/class or single department/class/subclass combination. If none of the parameters are sent, the screen will be displayed with no search results.

URL:

`http://<hostname>/Rms/faces/RmsHome?pmDepts=<dept>&pmClass=<class>&pmSubClass=<subclass>&navModelItemId=searchOrderflowExternal`

Parameters:

Parameter	Required	Description
Department	No	One or more department IDs; if multiple sent, they should be separated by commas. For example, pmDepts=100,200,300.
Class	No	Class ID
Subclass	No	Subclass ID

Order

When this page is launched, Merchandising will display information for the order included in the URL in either view or edit mode.

URL:

`http://<hostname>/Rms/faces/RmsHome?pmMode=<mode>&pmOrderNo=<order>&navModelItemId=MaintainPurchaseOrderFlow`

Parameters:

Parameter	Required	Description
Order	Yes	Purchase order number
Mode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Transfer

When this page is launched, Merchandising will display information for the transfer included in the URL in either view or edit mode.

URL:

`http://<hostname>/Rms/faces/RmsHome?pmMode=<mode>&pmTsfNo=<transfer>&navModelItemId=MaintainTransferHeaderFlow`

Parameters:

Parameter	Required	Description
Transfer	Yes	Transfer number
Mode	Yes	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Shipment

When this page is launched, Merchandising will display information for the shipment included in the URL in either view or edit mode.

URL:

`http://<hostname>/Rms/faces/RmsHome?pmShipment=<shipment>&pmMode=<mode>&navModelItemId=MaintainShipmentDetailFlow`

Parameters:

Parameter	Required	Description
Shipment	Yes	Shipment number
Mode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Return to Vendor

When this page is launched, Merchandising will display the information for the RTV included in the URL in either view or edit mode.

URL:

`http://<hostname>/Rms/faces/RmsHome?pmRtvOrderNo=<rtv>&pmMode=<mode>&navModelItemId=MaintainRtvDetailFlow`

Parameters:

Parameter	Required	Description
RTV	Yes	RTV number
Mode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Transaction Data

When this page is launched, Merchandising will display the transaction data based on the search criteria included in the URL. In order to successfully execute the search, at least one of the following must be included department, item, store, or warehouse, along with the transaction date range.

URL:

`http://<hostname>/Rms/faces/RmsHome?pmItem=<item>&pmWarehouse=<warehouse>&pmStr=<store>&pmTransStrtDate=<tran_start_date>&pmTransEndDate=<tran_end_date>&pmPostStrtDate=<post_start_date>&pmPostEdDate=<post_end_date>&pmCreateDate=<create_date>&pmDpt=<dept>&pmCls=<class>&pmSubcls=<subclass>&navModelItemId=ViewTransactionDataFlow`

Parameters:

Parameter	Required	Description
Item	No	Item ID
Warehouse	No	Virtual warehouse ID
Store	No	Store ID
Transaction Start Date	Yes	Start range for searching on transaction date
Transaction End Date	No	End range for searching on transaction date; if not included in the URL, the start date will be used as the end date in the search.
Post Start Date	No	Start range for searching on post date
Post End Date	No	End range for searching on post date
Create Date	No	Create Date
Department	No	Department ID
Class	No	Class ID
Subclass	No	Subclass ID

Average Cost Adjustments

When this page is launched, Merchandising will display the average cost adjustment screen with the item and location data defaulted based on the information in the URL.

URL:

`http://<hostname>/Rms/faces/RmsHome?pmMode=<mode>&pmItem=<item>&pmLocType=<loc_type>&pmLocation=<location>&navModelItemId=MaintainAvgCostAdjFlowExt`

Parameters:

Parameter	Required	Description
Item	Yes	Item ID
Location Type	Yes	Location type - either S (store) or W (warehouse)
Location	Yes	Store or virtual warehouse ID
Mode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Allocation

Quick Create

When this page is launched, Allocation will open the Allocation Maintenance page to initiate an allocation with the passed in source type, source ID and item IDs.

URL:

https://<hostname>/alloc/faces/Home?navModelItemId=quickCreateTF&source=<source>&sourceIdList=<source_list>&itemIdList=<item_list>

Parameters:

Parameter	Required	Description
Source	Yes	Should be a valid source type for an allocation - PO, WAREHOUSE, ASN, or BOL
Source ID List	Yes	Should indicate the entity ID that relates to the source. For example, if the source is PO, then this would be one or more purchase order number. If more than one is included, they should be separated by semicolons.
Item List	Yes	Should indicate the items that will be allocated. If more than one is included, they should be separated by semicolons.

Load Allocation

When this page is launched, Allocation will open the allocation included in the URL in edit mode.

URL:

http://<hostname>/alloc/faces/Home?navModelItemId=loadAllocationTF&allocationId=<allocation_id>

Parameters:

Parameter	Required	Description
Allocation	Yes	Valid allocation ID.

Invoice Matching

Summary Match

When this page is launched, Invoice Matching fetches all the invoices and receipts associated with the default match key from the supplier and for the given invoice.

URL:

<http://<hostname>/ReimViewController/faces/Home?navModelItemId=SummaryMatchService&supplier=<supplier ID>&invoice=<invoice ID>>

Parameters:

Parameter	Required	Description
Supplier	Yes	Supplier ID
Invoice	Yes	Invoice or document ID

Discrepancy List Flow

When this screen is launched, Invoice Matching fetches all the discrepant invoices for the given supplier and invoice.

URL:

<http://<hostname>/ReimViewController/faces/Home?navModelItemId=DiscrepancyListService&supplier=<supplier ID>&invoice=<invoice ID>>

Parameters:

Parameter	Required	Description
Supplier	Yes	Supplier ID
Invoice	Yes	Invoice or document ID

Sales Audit

Store Day Search

When this page is launched, Sales Audit will pre-populate the Store Day search based on the parameters included and optionally auto execute the search. Only one store/day combination can be included.

URL:

<http://<hostname>/ResaPortal/faces/Home?navModelItemId=SearchStoreDayTF?Store=<storeId>&BusinessDay=<BusinessDay>>

Parameters:

Parameter	Required	Description
Store	Yes	The ID for a store to include in a search
BusinessDay	Yes	Business day to use in the search in the format DD-MON-RR.
AutoExecute	No	Indicates if the query should be automatically executed when the screen is launched or not. Valid values are Y or N.

Parameter	Required	Description
AssignedStores	No	Filters the returned list to the user's assigned stores (Y) or to the stores not assigned to the user (N).
DataStatus	No	Filters the returned list of store days by data status for one of the following: Fully Loaded (F), Purged (G), Loading (L), Partially Loaded (P), and Ready for Import (R).
OverAllStatus	No	Filters the returned list of store days by overall status for one of the following: Complete (A) or In Progress (I).

Store Day Maintenance

When this page is launched, Sales Audit will display information for the store day based on the parameters included in the URL in edit mode or view mode, depending on the user's privileges.

URL:

<http://<hostname>/ResaPortal/faces/Home?navModelItemId=MaintainStoreDayTF?StoreSeqNo=<StoreDaySequenceNo>&Store=<Store ID>&BusinessDate=<BusinessDate>>

Parameters:

Parameter	Required	Description
StoreSeqNo	Yes	The sequence number for the store day.
Store	Yes	ID for a store
BusinessDate	Yes	Business day to use in the search in the format DD-MON-RR.
TabToDisclose	No	This parameter, if included can indicate that the Over/Short tab should be the focus when the page opens. If this parameter is included, it must have a value of OS, which means that the Over/Short tab will be in focus. Otherwise, the focus will be on the error list.

Transaction Maintenance

When this page is launched, Sales Audit will display information for the transaction sequence number included in the URL in edit mode or view mode, depending on the user's privileges.

URL:

<http://<hostname>/ResaPortal/faces/Home?navModelItemId=MaintainTransactionTF?TransactionSeqNo=<TransactionSeqNo>>

Parameters:

Parameter	Required	Description
TransactionSeqNo	Yes	The sequence number for the transaction.

Transaction Search

When this page is launched, Sales Audit will pre-populate the Transaction search based on the parameters included and optionally auto execute the search. Only a single transaction sequence can be sent.

URL:

`http://<hostname>/ResaPortal/faces/Home?navModelItemId=ManageTransactionTF?TransactionSeq=<TransactionSeq>&Store=<StoreID>&TranBusinessDate=<TranBusinessDate>`

Parameters:

Parameter	Required	Description
TransactionSeq	Yes	The sequence number for the transaction.
StoreId	Yes	The ID of a store to include in the search.
TranBusinessDate	Yes	The business date to use in the search in the format in the format DD-MON-RR.
ErrorExists	No	If included, filters the returned list to transactions with errors (Y) or without (N).
AutoExecute	No	Indicates if the query should be automatically executed when the screen is launched or not. Valid values are Y or N.

Merchandising Style Guide

This section outlines the styles used in developing the Merchandising solution user interfaces. It is included here so that you can use the information for any custom reports or bolt-on applications to give them a similar look and feel, providing a more seamless experience for your users.






Fonts

The primary typeface that is used for the UI is Arial, with Helvetica used for some of the headings.

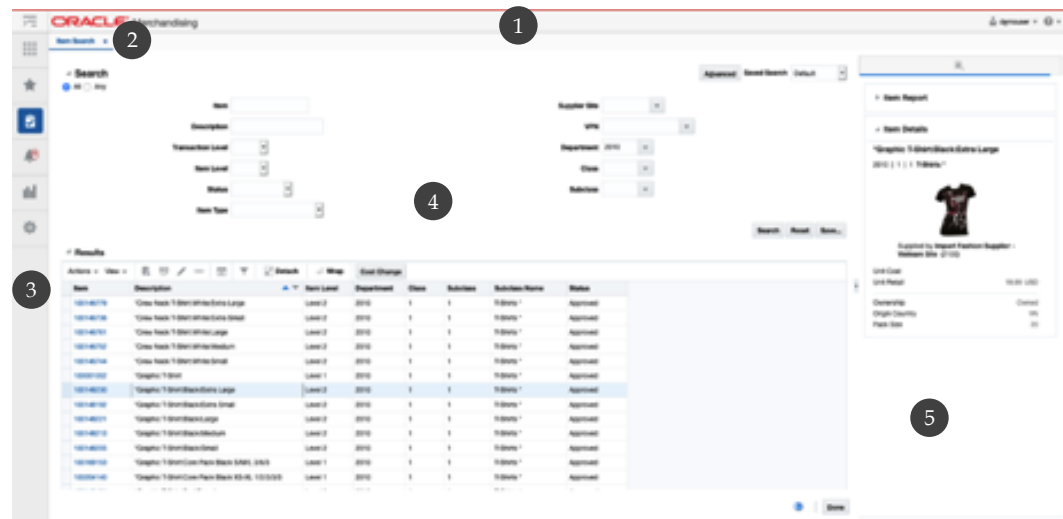
Type Style	Type Styling Details
Headline 1 (H1)	18px, Bold, #252525 (r37 g37 b37)
Headline 2 (H2)	15px, Bold, #252525 (r37 g37 b37)
Headline 3 (H3)	13px, Bold, #252525 (r37 g37 b37)
Headline 4 (H4)	13px, Bold, #252525 (r37 g37 b37)
Headline 5 (H5)	12px, Bold, #252525 (r37 g37 b37)
HEADLINE 6 (H6)	12px, Regular, #252525 (r37 g37 b37), Uppercase
Panel Header / Panel Window Titles	13px, Bold, #000000 (r0 g0 b0)
Body Text	12px, #000000 (r0 g0 b0), line-height: 16px
Field Label	12px, Bold, #000000 (r0 g0 b0)
Standard Link State / Hover	12px, #145c9e (r20 g92 b158); Hover: underlined
Output Text	12px, #767676, r 118g118b118

Colors

These are the colors used in the UIs. Which colors apply for which components is described below.

Black	Medium Grey	Light Grey	White	Blue	Red
					
#000000 (r0 g0 b0)	#555555 (r85 g85 b85)	#bfbfbf (r191 g191 b191)	#ffffff (r255 g255 b255)	#3b6087 (r59 g96 b135)	#ff0000 (r255 g0 b0)

Global Screen Structure



All the screens in Merchandising have a similar layout, with these main key areas:

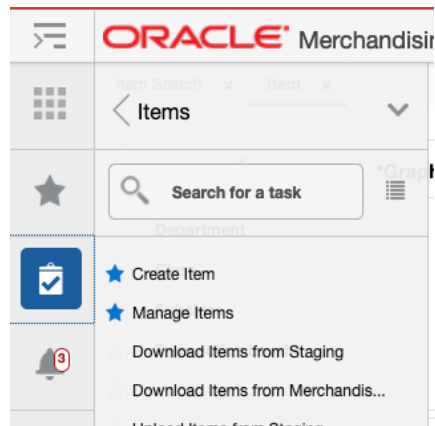
1. Global Navigation Bar
2. Application Tabs
3. Navigational Area
4. Local Area
5. Contextual Area

Global Navigation Bar

The global navigation bar shows the name of the solution and also contains the user menu and a global help icon. The makeup of this bar is as follows:

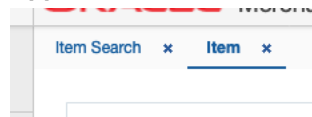
Components	Font	Background Color	Size
Top Border		Red	Height: 2 pixels
Main Section	Application title: Headline 1	Light Gray	Height: 42 pixels
Bottom Border		Medium Gray	Height: 1 pixel

Application Menu Bar



Components	Font	Background Color	Size
Menu Button section	n/a	Light Gray	Width: 40 pixels
Fly-out Menu	Body Text	Light Gray	Width: 250 pixels

Application Tabs



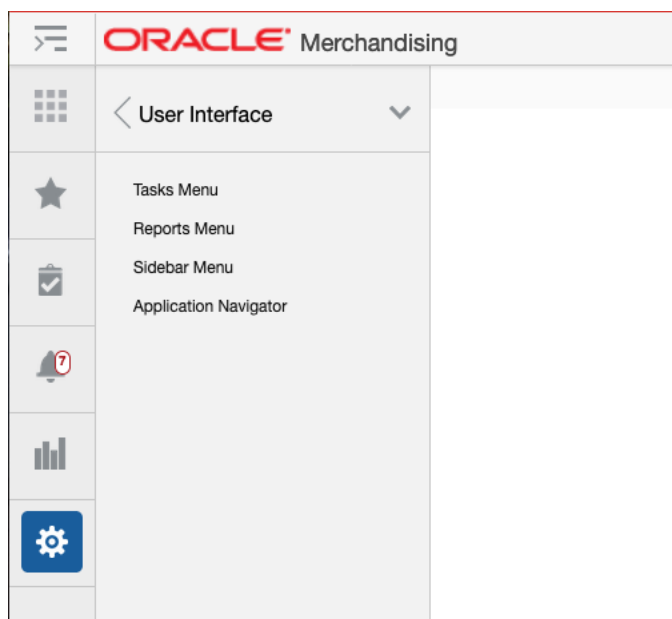
Components	Font	Background Color	Size
Active tab	Standard Link State, Bold	White Border: Blue	Height: 30 pixels (border 3 pixels) Width: minimum 80 pixels
Inactive tab	Standard Link State	White	Height: 30 pixels (no border) Width: minimum 80 pixels

Application Customization

The Merchandising suite provides different options for customizing the user interface to meet your business practices, and in some cases to surface custom content. This includes adding links to custom workflows or reports in the Tasks menu, adding custom reports to dashboards or contextual panes, and customizing the labels used in the solutions. These options are accessed from the Settings icon in the sidebar menu in each of the Merchandising solutions.

User Interface

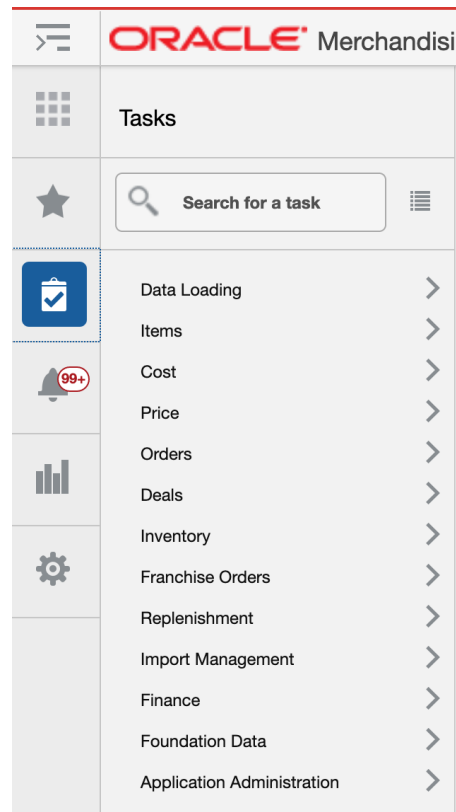
User interface customization is an option that can be used to customize the look and feel of the tasks, reports menu, and sidebar menus and which applications are shown in the Application Navigator.



Tasks Menu

The Tasks Menu link opens the Tasks Menu page, which allows an administrator can add, modify or remove the tasks available. For example, you may want to add a link for your users to a custom bolt-on application. You can also add a new folder and re-organize how the base task links are organized.

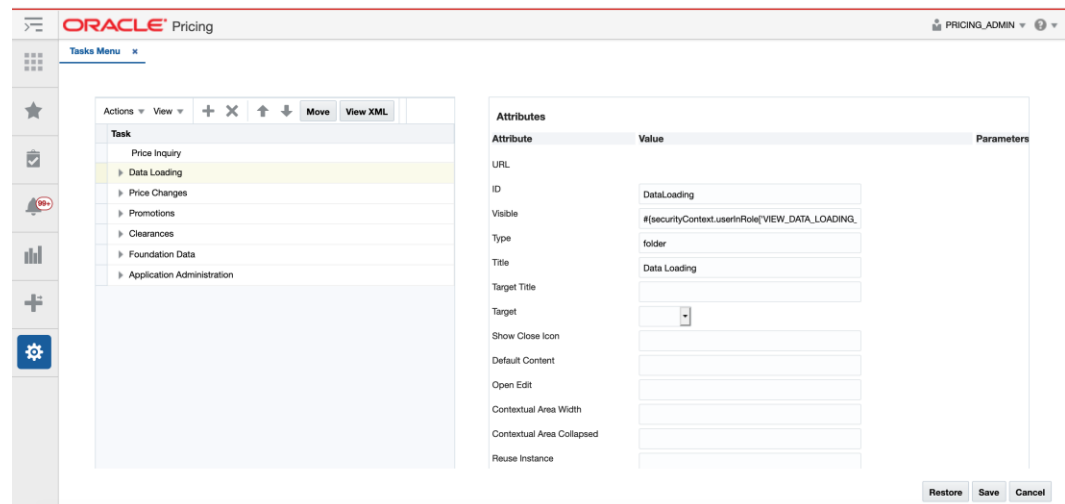
Base Merchandising Tasks Menu



Clicking on the Task Menu option under Settings displays a page like is shown below. On this page are buttons to save, restore or cancel the changes.

When you click **Save**, your changes will be immediately reflected in the Tasks menu. The **Cancel** button closes the tab without saving the changes. The **Restore** button replaces the customized menu with the with the base product configuration.

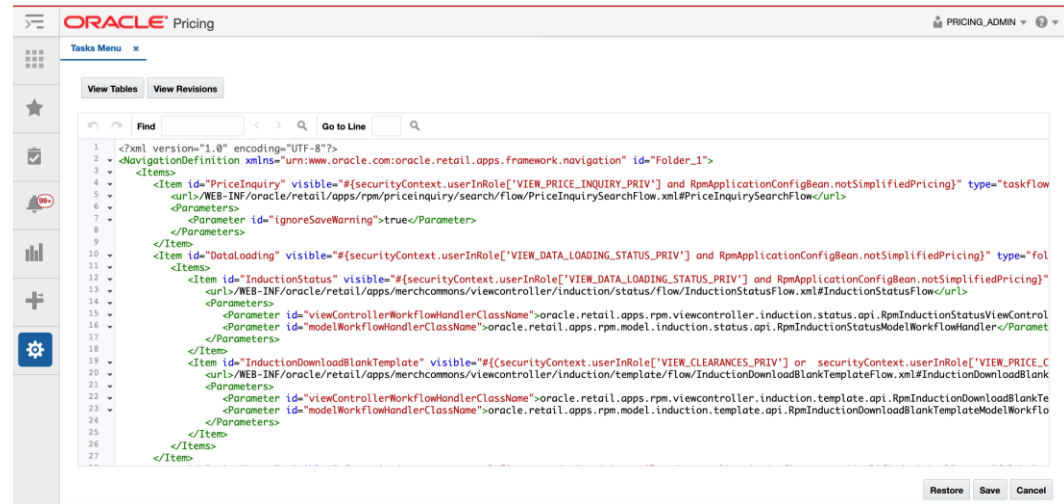
Table View



You can also click on the **View XML** button to view the XML version of the menu in an XML editor. The XML view contains a **View Tables** button which takes the user back to

the tables view. The XML view also has a **View Revisions** button that allows you to view prior revisions of the task list. This should be used to re-apply any customizations you make after a patch is applied, as customizations are not retained during patching.

XML View



The task menu model xml file uses the xml schema definition called NavigationModel.xsd for xml validation. The Navigation Model schema definition file is used to validate any changes done by the administrator on the task menu xml file. The task menu model file consists of a hierarchy of item elements. Each element represents a menu item in the task menu. The item element can either be a folder or a URL, with a list of attributes and parameters that identify the task menu item.

Below is the example of a task menu model item:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<NavigationDefinition ... >
  <Items>
    <Item id="myFolder" title="My Folder" type="folder">
      <Items>
        <Item id="myContent" type="link" title="My Content" target="_blank"
          refreshOnDisclosure="false" dynamicTabFocus="true"
          closeOverride="false" reloadTab="false" popupContentHeight="250"
          popupContentWidth="250" popupStretchChildren="none" popupResize="on"
          popupId="0" renderIconTitle="textOnly"
          modulePathActiveValidation="all">
          <url>http://<xyz>.com</url>
        </Item>
      </Items>
    </Item>
  </Items>
</NavigationDefinition>
```

Add New Task Menu Items

In cloud service implementations, there are two types of task menu items that can be added - a folder or a link.

Add a New Task Link

To add a new task link, starting from the Tasks Menu page, select the folder in the Task table where you want your link displayed. For example, if you want to add a new link

under Items in Merchandising, highlight the Items row in the Task table. Then, click the Create iconic button (+) or select Create from the Actions menu. Or, if you don't want it displayed in an existing folder, then select the Create On Top option from the Actions menu. Both options will result in a popup being displayed like shown below.

In the popup, give your link a unique ID, select the type **link**, and enter a business facing title. Then click **OK**. You should now see the new link item in the Task table. To rearrange the order that the link is displayed in the folder click on the up and down arrows (↑ ↓) in the Task table toolbar or click on the **Move** button, which will allow you to select another folder to which to move your link.

Next, you will need to configure your link using the Attributes panel. Alternatively, you can click on the View XML option and configure your link. The following attributes apply for task links:

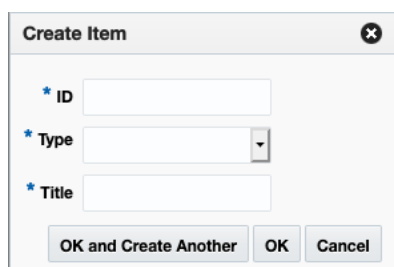
Attribute	Description
URL	The full URL for your link. If you are adding the link using the View XML option, the entire URL must be marked as character data (e.g. enclosed in CDATA).
ID (id)	Unique identifier for menu items. When adding your custom link, make sure that it does not duplicate any of the base IDs.
Visible (visible)	Indicates if the item should be rendered (visible) or not. Valid values are true (default) or false. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings to determine the visibility of your link. For example, if you want your link only visible to users with the Maintain Items privilege, then you can use the ADF securityContext API isUserInRole method and set this to <code>#{securityContext.userInRole['MAINTAIN_ITEMS_PRIV']}</code> .
Type (type)	Indicates the type of the item. Valid values are: <ul style="list-style-type: none"> folder - indicates that the item contains additional sub-navigation items link - used for URLs An additional type (taskflow and dynamicContent) is not supported in SaaS implementations for the Task List.
Title (title)	Used to provide the user-facing title of the task item in the primary language. Required.

Attribute	Description
Target (target)	For custom links, one of the following target types can be selected: <ul style="list-style-type: none"> ▪ <code>_blank</code>: renders the URL in a new browser tab ▪ <code>_self</code>: opens the custom link on top of the Merchandising screen; overwriting the application screen ▪ <code>_top</code>: same behavior as <code>_self</code>
Access Key (accessKey)	Optional. Used to specify the keyboard keystroke or a group of keystrokes that are used to access the navigation item using the keyboard.
Short Description (shortDesc)	Optional. Used to provide the description of the navigation item which will be displayed when the user hovers over a menu item.

The other attributes in the Tasks Menu page do not apply for custom task menu links.

Add a New Folder

To add a new sub-folder, starting from the Tasks Menu page, select the folder in the Task table where you want your sub-folder displayed. For example, if you want to add a new subfolder under Inventory in Merchandising, highlight the Inventory row in the Task table. Then click the Create iconic button (+) or select Create from the Actions menu. Or, if you don't want to add your folder in an existing folder, select the option Create On Top from the Actions menu. Both options will result in a popup being displayed like shown below.



The screenshot shows a 'Create Item' dialog box with a close button (X) in the top right corner. It contains three required fields, each marked with an asterisk (*): 'ID' (text input), 'Type' (dropdown menu), and 'Title' (text input). At the bottom of the dialog, there are three buttons: 'OK and Create Another', 'OK', and 'Cancel'.

In the popup, give your folder a unique ID and enter a user-facing title. Also, select the type folder. Then click OK. You should now see the new folder in the Task table. You can optionally also configure the attributes in the Attribute panel, or using the View XML option. The parameters for folders are similar to those described above for adding task links.



To rearrange the order that the subfolder is displayed in the selected folder, click on the up and down arrows (↑ ↓) in the Task table toolbar or click on the Move button, which will allow you to select another folder to which to move your folder.

To move links into this new folder, follow the steps in Modify an Existing Task. To add new tasks to this folder, follow the steps in Add a New Task Link.

Modify an Existing Task

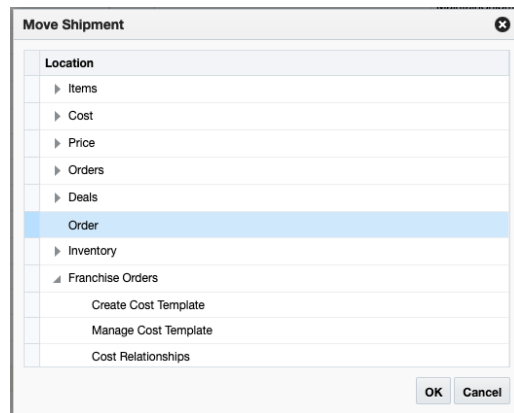
If you need to modify a custom link or folder you added previously, you can also do that in the Tasks Menu page. Also, there are some changes you can make to base links in this view, with limitations.

Rearrange Folders or Links

If you want to rearrange the order of folders or links (base or custom), highlight the link or folder to be moved in the Task table of the Tasks Menu page. Then, click on the up or down arrows ( ) in the Task table toolbar to move the link or folder up or down within the same parent folder.

Move Folder or Link to New Folder

If you want to move a link or folder (base or custom) to a different parent folder, then highlight the link or folder to be moved in the Task table of the Tasks Menu page. Then, click the Move button in the Task table toolbar. This will open a popup where you can select the new parent folder for your folder or link.



If you want to move your item to the top level so that it isn't inside of a parent folder, then select Move On Top from the Actions menu.

Modify Link Attributes

If you want to modify the attributes for your custom link or folder, you can do that by highlighting the appropriate link or folder in the Task table of the Tasks Menu page and editing the attributes similar to what was described in the Add New Task Menu Items section.

You can also do some limited editing of the attributes for base task list links or folders. The attributes that can be modified for a base task link or folder are described in the table below.

Attribute	Description
Visible (visible)	Indicates if the item should be rendered (visible) or not. Valid values are true (default) or false. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings to determine the visibility of your link. For example, if you want your link only visible to users with the Maintain Items privilege, then you can use the ADF <code>securityContext</code> API <code>isUserInRole</code> method and set this to <code>#{securityContext.userInRole['MAINTAIN_ITEMS_PRIV']}</code> . Customizing this for base links should be done only in exceptional situations. Best practice is to control visibility for base links and folders based on the privileges assigned to your user's roles, or using system options settings. For more details on the privileges that control the base links and folders, see the <i>Security Guide - Volume 2</i> for the applicable Merchandising solution.
Title (title)	Used to provide the user-facing title of the task item in the primary language. Required.
Default Content (defaultContent)	Indicates whether the corresponding link is displayed by default in the content area when the application is launched. This could be used to display one of the base workflows by default to a user when they log into a Merchandising solution. Valid values are true (default) or false. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings, similar to the Visible attribute. This attribute is not applicable for base folders or custom links/folders.
Access Key (accessKey)	Optional. Used to specify the keyboard keystroke or a group of keystrokes that are used to access the navigation item using the keyboard.
Short Description (shortDesc)	Optional. Used to provide the description of the navigation item which will be displayed when the user hovers over a menu item.

The other attributes in the Tasks Menu page do not apply for modifying base task menu links.

Remove a Task

If you want to remove a custom task link or folder that you previously added, then highlight the link or folder in the Task table of the Tasks Menu page and click on the delete iconic button (✕) or select Delete from the Actions menu.

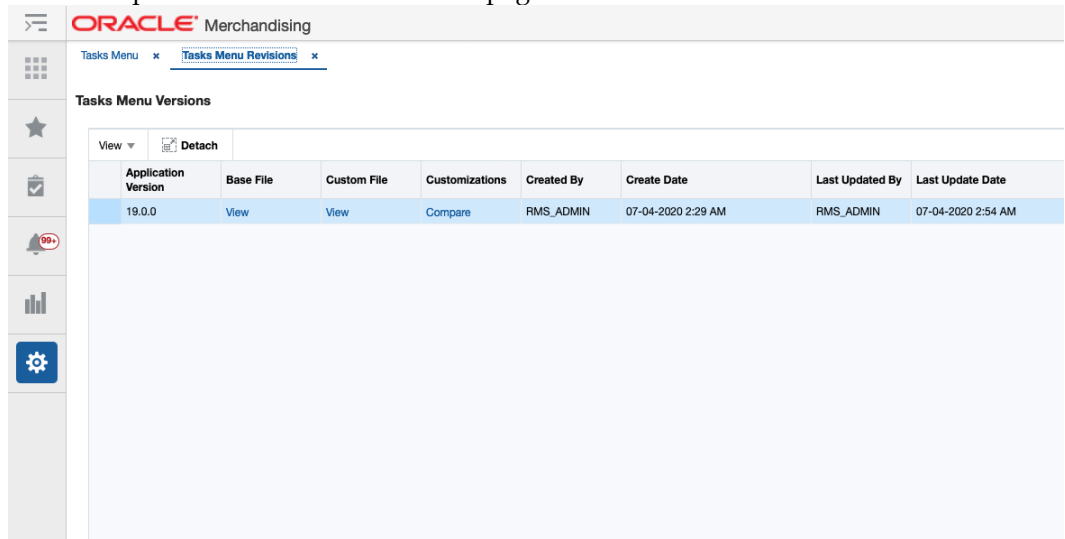
Note: It is highly recommended that you don't delete any of the base task links.

Re-apply Task Customizations After Patching

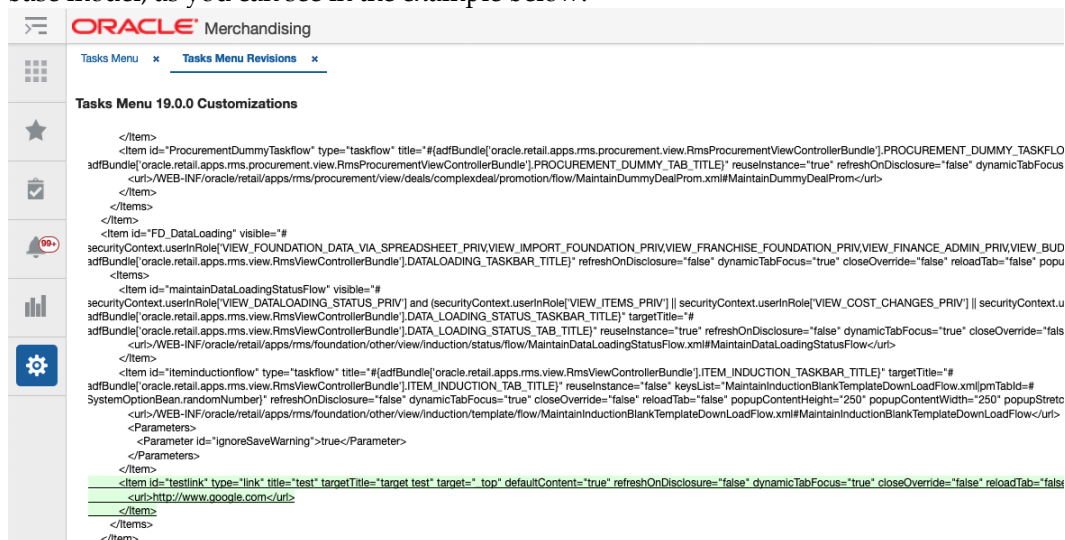
If you have made any customizations to the Tasks menu, then after a patch update, the changes will be lost. To re-apply your changes after patch updates, follow these steps:


1. From the Settings menu, select User Interface > Tasks Menu.
2. Click the **View XML** button, and then from the XML view, select **View Revisions**.

- This will open the Tasks Menu Versions page.



- From here, you can view the base version, your customized version, or a comparison of the two. The comparison view highlights your additions and subtractions from the base model, as you can see in the example below.

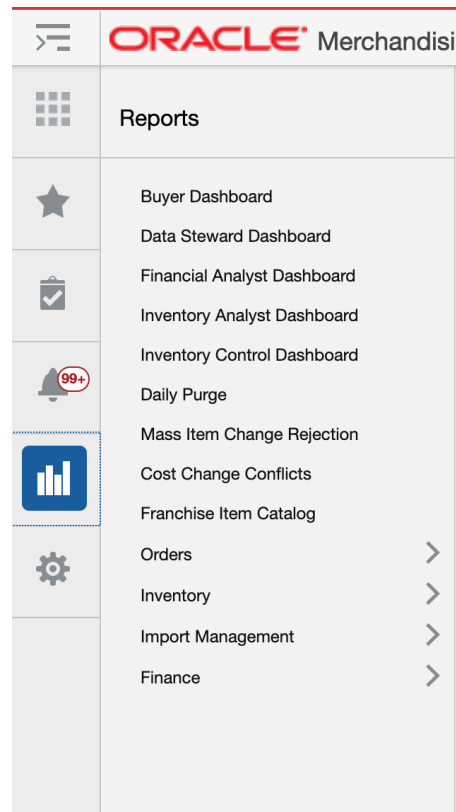


- Note the customizations made – you may want to copy to a text editor, highlighting the changes as appropriate – and then click **Back** to return to the Task Menu Versions page.
- Click **Cancel** to return to the Task Menu XML View page. Using the highlighted differences from the revision page, reapply your customizations. Then, click **Save**.
- Click on the Tasks menu icon () to validate that your changes have been re-applied.

Reports Menu

The Reports Menu link opens the Reports Menu page that allows you to add, modify or remove the reports available in the Reports menu. For example, if you have built some custom reports using BI Publisher, you might add the links using this function.

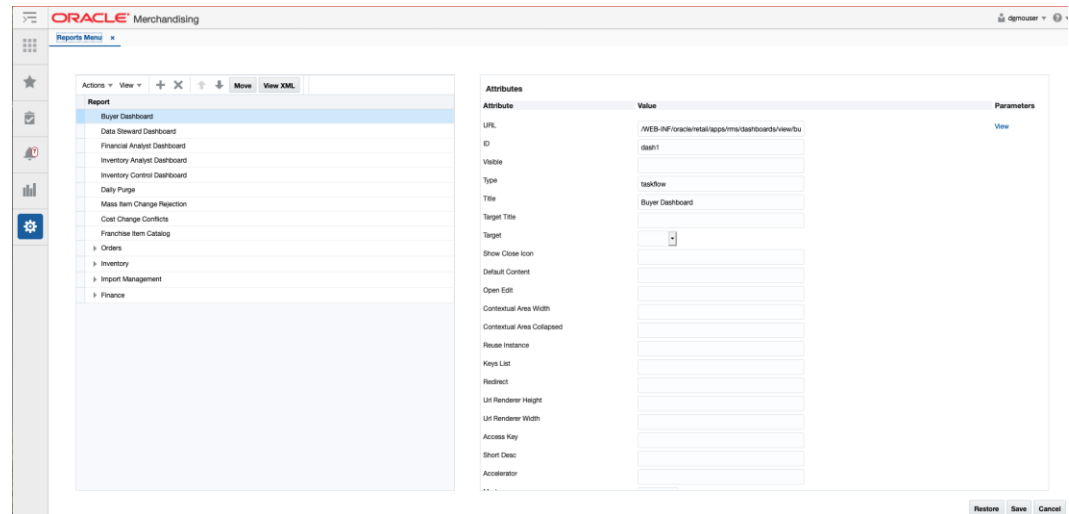
Base Merchandising Reports Menu



Clicking on the Reports Menu option under Settings displays a page like is shown below. On this page are buttons to save, restore or cancel the changes.

When you click **Save**, your changes will be immediately reflected in the Reports menu. The **Cancel** button closes the tab without saving the changes. The **Restore** button replaces the customized menu with the with the base product configuration.

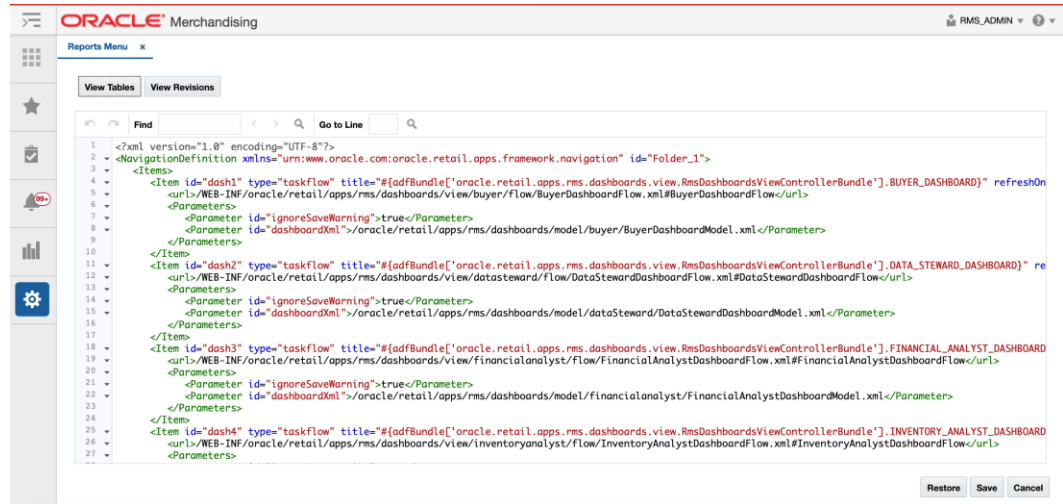
Table View



You can also click on the **View XML** button to view the XML version of the menu in an XML editor. The XML view contains a **View Tables** button which takes the user back to the tables view. The XML view also has a **View Revisions** button that allows you to view

prior revisions of the reports list. This should be used to re-apply any customizations you make after a patch is applied, as customizations are not retained during patching.

XML View



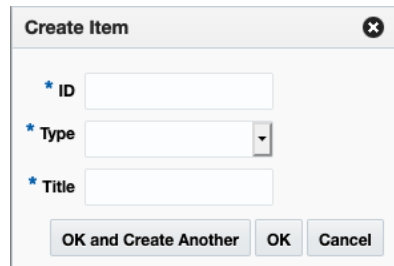
The Reports menu customization is similar to that used for the Tasks menu. The Reports menu model file consists of a hierarchy of item elements. Each element represents a menu item in the Reports menu. The item element can either be a folder or a URL, with a list of attributes and parameters that identify the task menu item.

Add New Report Menu Items

In cloud service implementations, there are two types of report menu items that can be added - a folder or a link.

Add a New Report Link

To add a new report link, starting from the Reports Menu page, select the folder in the Report table where you want your link displayed. For example, if you want to add a new link under the Finance folder in Merchandising, highlight the Finance row in the Report table. Then, click the Create icon button (+) or select Create from the Actions menu. Or, if you don't want it displayed in an existing folder, then select the Create On Top option from the Actions menu. Both options will result in a popup being displayed like shown below.



In the popup, give your link a unique ID, select the type **link**, and enter a business facing title. Then click **OK**. You should now see the new link item in the Report table. To rearrange the order that the link is displayed in a folder click on the up and down arrows (↑ ↓) in the Report table toolbar or click on the **Move** button, which will allow you to select another folder to which to move your link.

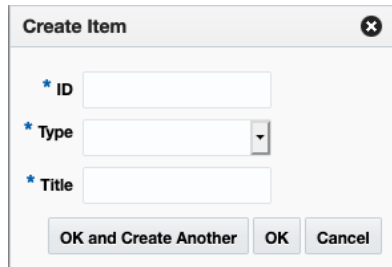
Next, you will need to configure your link using the Attributes panel. Alternatively, you can click on the View XML option and configure your link. The following attributes apply for report links:

Attribute	Description
URL	The full URL for your link. If you are adding the link using the View XML option, the entire URL must be marked as character data (e.g. enclosed in CDATA).
ID (id)	Unique identifier for menu items. When adding your custom link, make sure that it does not duplicate any of the base IDs.
Visible (visible)	Indicates if the item should be rendered (visible) or not. Valid values are true (default) or false. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings to determine the visibility of your link. For example, if you want your link only visible to users with the Maintain Items privilege, then you can use the ADF <code>securityContext</code> API <code>isUserInRole</code> method and set this to <code>#{securityContext.isUserInRole['MAINTAIN_ITEMS_PRIV']}</code> .
Type (type)	Indicates the type of the item. Valid values are: <ul style="list-style-type: none"> ▪ folder - indicates that the item contains additional sub-navigation items ▪ link - used for URLs An additional type (taskflow and dynamicContent) is not supported in SaaS implementations for the Report List.
Title (title)	Used to provide the user-facing title of the report link in the primary language. Required.
Target (target)	For custom links, one of the following target types can be selected: <ul style="list-style-type: none"> ▪ <code>_blank</code>: renders the URL in a new browser tab ▪ <code>_self</code>: opens the custom link on top of the Merchandising screen; overwriting the application screen ▪ <code>_top</code>: opens the custom link on top of the Merchandising screen; overwriting the application screen
Access Key (accessKey)	Optional. Used to specify the keyboard keystroke or a group of keystrokes that are used to access the navigation item using the keyboard.
Short Description (shortDesc)	Optional. Used to provide the description of the navigation item which will be displayed when the user hovers over a menu item.

The other attributes in the Report Menu page do not apply for custom menu links.

Add a New Folder

To add a new sub-folder, starting from the Report Menu page, select the folder in the Report table where you want your sub-folder displayed. For example, if you want to add a new subfolder under the Orders folder in Merchandising, highlight the Orders row in the Report table. Then click the Create icon button (+) or select Create from the Actions menu. This will result in a popup being displayed like shown below.



The 'Create Item' dialog box contains three required fields: 'ID', 'Type', and 'Title'. The 'ID' field is a text input, 'Type' is a dropdown menu, and 'Title' is a text input. At the bottom, there are three buttons: 'OK and Create Another', 'OK', and 'Cancel'.

In the popup, give your folder a unique ID and enter a user-facing title. Also, select the type **folder**. Then click **OK**. You should now see the new folder in the Report table. You can optionally also configure the attributes in the Attribute panel, or using the View XML option. The parameters for folders are similar to those described above for adding [report links](#).

To rearrange the order that the subfolder is displayed in the selected folder, click on the up and down arrows (↑ ↓) in the Report table toolbar or click on the **Move** button, which will allow you to select another folder to which to move your folder.

To move links into this new folder, follow the steps in [Modify an Existing Report](#). To add new reports to this folder, follow the steps in [Add a New Report Link](#).

Modify an Existing Report

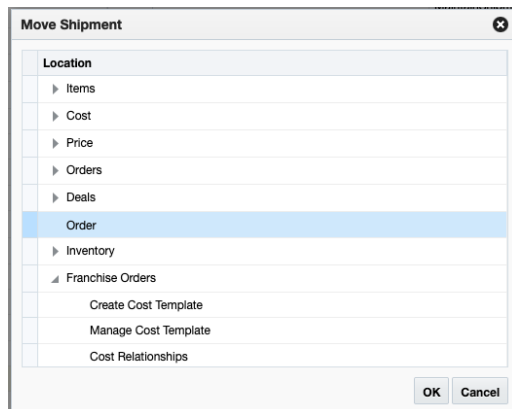
If you need to modify a custom link or folder you added previously, you can also do that in the Report Menu page. Also, there are some changes you can make to base links in this view, with limitations.

Rearrange Folders or Links

If you want to rearrange the order of folders or links (base or custom), highlight the link or folder to be moved in the Report table of the Reports Menu page. Then, click on the up or down arrows (↑ ↓) in the Report table toolbar to move the link or folder up or down within the same parent folder.

Move Folder or Link to New Folder

If you want to move a link or folder (base or custom) to a different parent folder, then highlight the link or folder to be moved in the Report table of the Reports Menu page. Then, click the **Move** button in the Report table toolbar. This will open a popup where you can select the new parent folder for your folder or link.



The 'Move Shipment' dialog box shows a tree view of folders under the 'Location' header. The folders listed are: Items, Cost, Price, Orders, Deals, Order (highlighted), Inventory, and Franchise Orders. Under 'Franchise Orders', there are three sub-items: Create Cost Template, Manage Cost Template, and Cost Relationships. At the bottom, there are 'OK' and 'Cancel' buttons.

Modify Link Attributes

If you want to modify the attributes for your custom link or folder, you can do that by highlighting the appropriate link or folder in the Report table of the Reports Menu page and editing the attributes similar to what was described in the [Add New Report Menu Items](#) section.

You can also do some limited editing of the attributes for base report links or folders. The attributes that can be modified for a base report link or folder are described in the table below.

Attribute	Description
Visible (visible)	Indicates if the item should be rendered (visible) or not. Valid values are true (default) or false. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings to determine the visibility of your link. For example, if you want your link only visible to users with the Maintain Items privilege, then you can use the ADF <code>securityContext</code> API <code>isUserInRole</code> method and set this to <code>#{securityContext.userInRole['MAINTAIN_ITEMS_PRIV']}</code> . Customizing this for base links should be done only in exceptional situations. Best practice is to control visibility for base links and folders based on the privileges assigned to your user's roles, or using system options settings. For more details on the privileges that control the base links and folders, see the <i>Security Guide - Volume 2</i> for the applicable Merchandising solution.
Title (title)	Used to provide the user-facing title of the report item in the primary language. Required.
Default Content (defaultContent)	Indicates whether the corresponding link is displayed by default in the content area when the application is launched. This could be used to display one of the base reports or dashboards by default to a user when they log into a Merchandising solution. Valid values are true (default) or false. It can also be an Expression Language (EL) expression that evaluates to true or false, similar to the Visible attribute. This attribute is not applicable for base folders or custom links/folders.
Access Key (accessKey)	Optional. Used to specify the keyboard keystroke or a group of keystrokes that are used to access the navigation item using the keyboard.
Short Description (shortDesc)	Optional. Used to provide the description of the navigation item which will be displayed when the user hovers over a menu item.

The other attributes in the Report Menu page do not apply for modifying base task menu links.


Remove a Report

If you want to remove a custom report link or folder that you previously added, then highlight the link or folder in the Report table of the Reports Menu page and click on the delete iconic button (✕) or select Delete from the Actions menu.

Note: It is highly recommended that you don't delete any of the base report links.

Re-apply Report Customizations After Patching

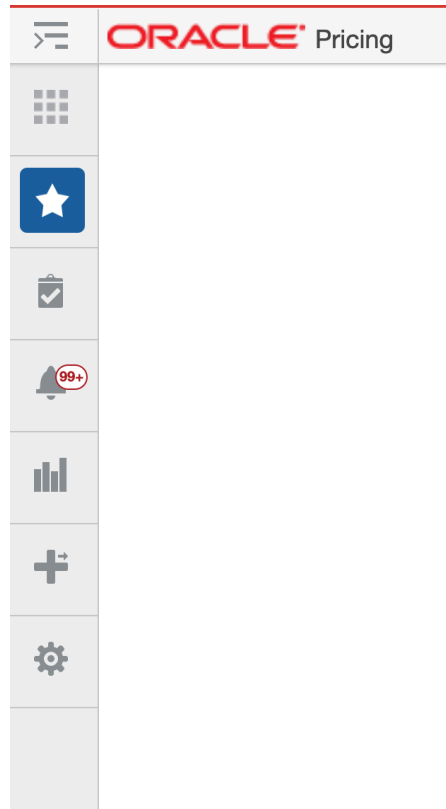
If you have made any customizations to the Reports menu, then after a patch update, the changes will be lost. To re-apply your changes after patch updates, follow these steps:

1. From the Settings menu, select User Interface > Reports Menu.
2. Click the **View XML** button, and then from the XML view, select **View Revisions**.
3. This will open the Reports Menu Versions page.
4. From here, similar to the Tasks menu, you can view the base version, your customized version, or a comparison of the two. The comparison view highlights your additions and subtractions from the base model.
5. Note the customizations made – you may want to copy to a text editor, highlighting the changes as appropriate – and then click **Back** to return to the Report Menu Versions page.
6. Click **Cancel** to return to the Report Menu XML View page. Using the highlighted differences from the revision page, reapply your customizations. Then, click **Save**.
7. Click on the Reports menu icon () to validate that your changes have been re-applied.

Sidebar Menu

The Sidebar Menu link opens a page that allows you to modify or remove the icons available in the sidebar menu for Merchandising solutions. For example, you could hide the Quick Create option in Allocation or Pricing if you are not using that functionality.

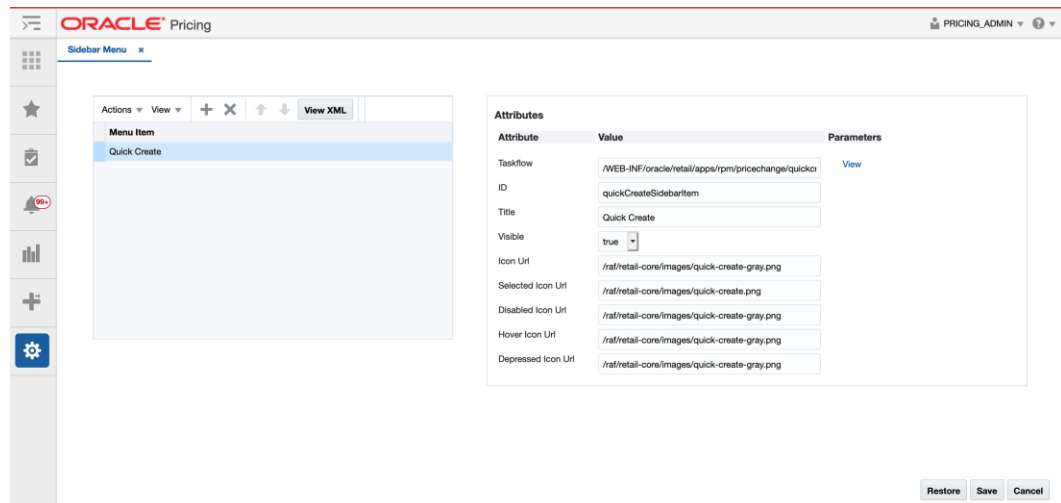
Sidebar Menu



Clicking on the Sidebar Menu option under Settings displays a page like is shown below. On this page are buttons to save, restore or cancel the changes.

When you click **Save**, your changes will be immediately reflected in the Sidebar menu. The **Cancel** button closes the tab without saving the changes. The **Restore** button replaces the customized menu with the with the base product configuration.

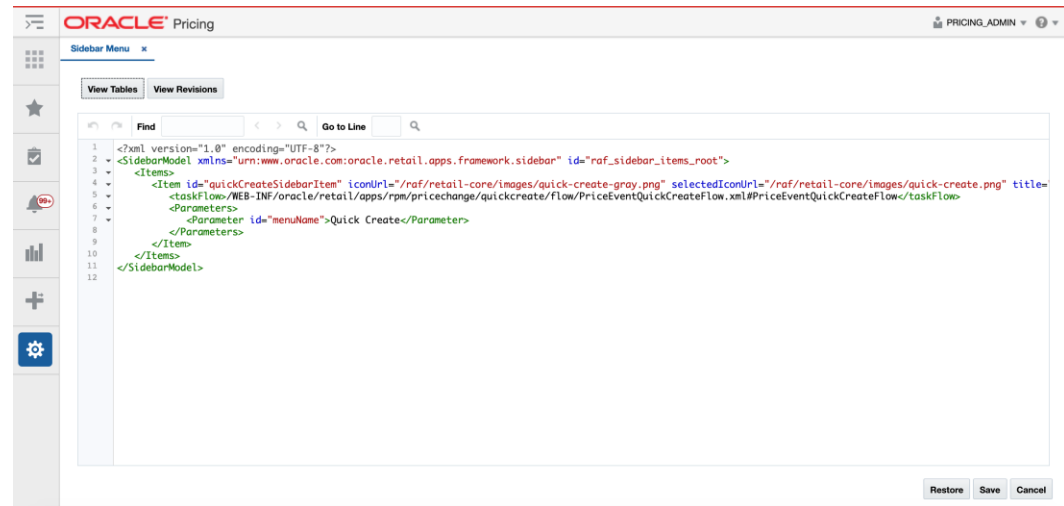
Table View



You can also click on the **View XML** button to view the XML version of the menu in an XML editor. The XML view contains a **View Tables** button which takes the user back to the tables view. The XML view also has a **View Revisions** button that allows you to view

prior revisions of the Sidebar. This should be used to re-apply any customizations you make after a patch is applied, as customizations are not retained during patching.

XML View



Modify a Sidebar Icon

The base icons for Settings, Reports, Notifications, Tasks, and Favorites are not able to be modified. However, for Pricing, Invoice Matching, and Allocation, which have a Quick Create or Quick Match option, you are able to configure in the Sidebar Menu page. To modify the base settings, from the Settings menu, select User Interface > Sidebar Menu. Highlight the base icon to modify in the table on the left side of the page. Then, in the attributes on the right side of the page, you can do the following:

- Update the title displayed when a user hovers over the icon
- Update the visible attribute to determine whether or not it should be displayed (valid values are true or false)

Remove a Sidebar Icon

It is highly recommended that you don't delete the base sidebar icons.

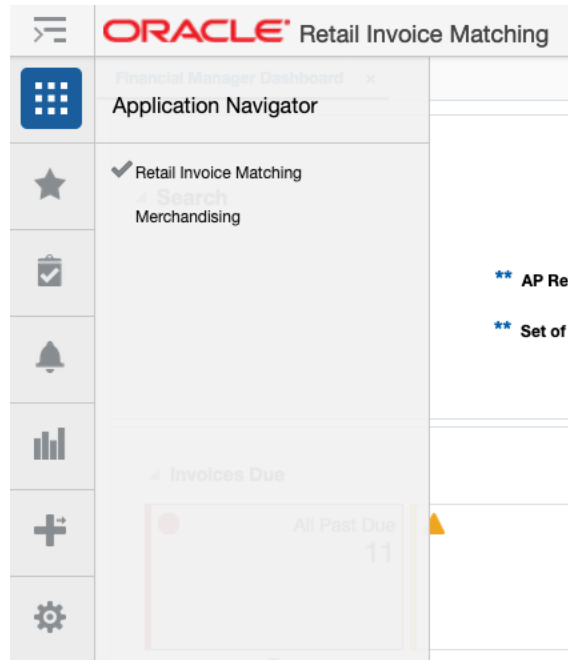
Re-apply Sidebar Customizations After Patching

If you have made any customizations to the Sidebar, then after a patch update, the changes will be lost. To re-apply your changes after patch updates, follow these steps:

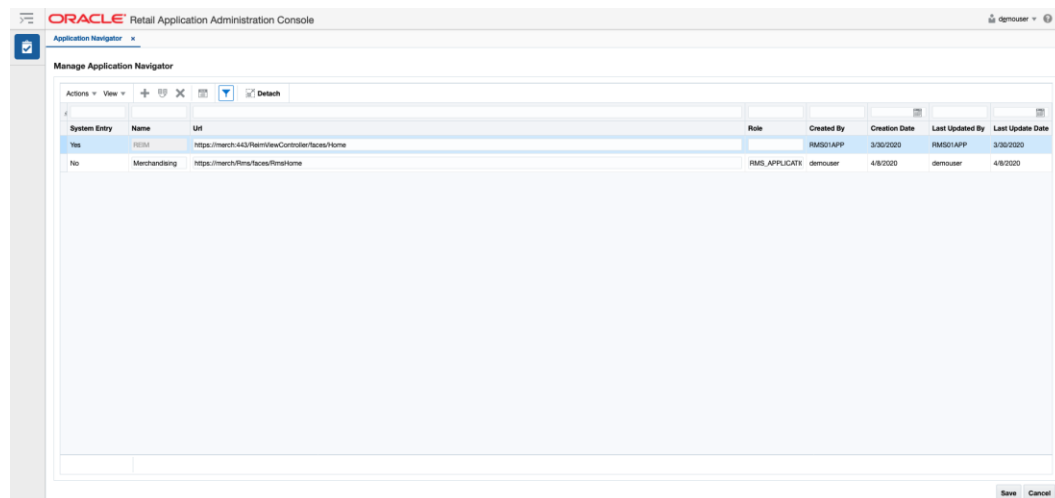
1. From the Settings menu, select User Interface > Sidebar Menu.
2. Click the **View XML** button, and then from the XML view, select **View Revisions**.
3. This will open the Sidebar Menu Versions page.
4. From here, similar to the Tasks menu, you can view the base version, your customized version, or a comparison of the two. The comparison view highlights your additions and subtractions from the base model.
5. Note the customizations made – you may want to copy to a text editor, highlighting the changes as appropriate – and then click **Back** to return to the Sidebar Menu Versions page.
6. Click **Cancel** to return to the Sidebar Menu XML View page. Using the highlighted differences from the revision page, reapply your customizations. Then, click **Save**. The changes should be immediately applied to the sidebar menu.

Application Navigator

The Application Navigator allows users to launch different applications from the Merchandising solution they are currently using so that they can shuffle between multiple applications based on their privileges and avoid having to open a new tab and enter a new URL to launch an application. Users can instead click on the solution from a list, which will launch that application in a new tab or window based on the browser settings.



If a user has access to multiple applications (based on their defined role) you can configure their list to show all available solutions in the Application Navigator page. Otherwise only the current solution will be displayed. Clicking on the Application Navigator option in the Settings > User Interface menu will open the Application Navigator screen in the Oracle Retail Application Administrator Console (ORAAC).



Add an Application

The Add action is enabled at all times and allows an administrator to add a new URL.

1. From the Actions menu, select Add. A new, empty entry is added to the table.
2. Enter a name, the application URL, and the role to which the URL applies. The remaining columns are populated automatically. URLs for the Merchandising solutions, or other solutions used by your user community can be included here.
3. Click Save to save your changes.

Users impacted by the new URL link you've added may need to log out and back in, in order to see the changes.

Modify an Application

While all the columns on a row can be modified, only the Role and URL columns of a System record can be modified by the administrators. After making updates, click **Save** to save your changes.

Duplicate an Application

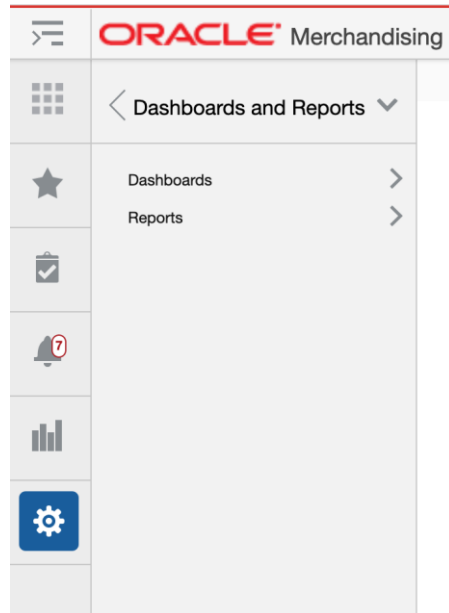
The Duplicate action adds a copy of each selected row below its originating row. The object name or unique identifier of the duplicate row is "Copy of <Object Name>" and appears in edit mode to prevent accidentally creating duplicate labels. This function may be helpful if you want to add the same link for multiple roles. After making updates, click **Save** to save your changes.

Delete an Application

The Delete action is enabled when an entry is selected. When the user selects an application navigator entry and clicks **Delete**, the user is prompted with a warning message. Click **Yes** and the selected entry is removed. After making updates, click **Save** to save your changes.

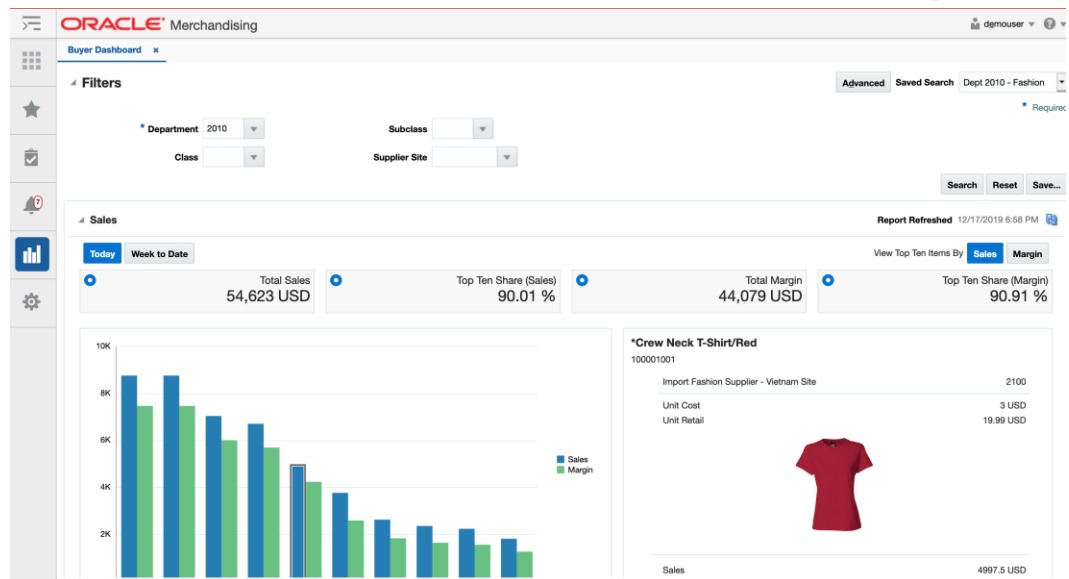
Dashboards and Reports

The Dashboard and Reports menu under Settings provides options to customize the reports displayed in Dashboards and the contextual pane in the Merchandising solutions. This can be used to add your own reports in the dashboard or in the contextual pane. Or to re-order or remove base reports from a particular dashboard or screen, or even to move base reports to different dashboards or contextual panes.



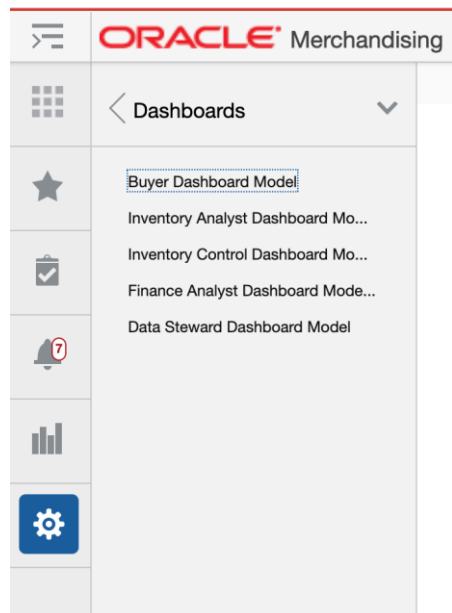
Dashboards

Dashboards are used by Merchandising solutions to surface exceptions and key metrics to users. Each dashboard is targeted for specific user roles, like the Buyer dashboard shown below. Most dashboards have two main sections – the filters and the reports.



The base solutions come with pre-defined reports, which can be used. But, you can also add your own reports and re-order or remove ones that don't apply to your business.

The filters cannot be modified. Adding or modifying the reports for a dashboard is done through the Settings > Dashboards and Reports > Dashboards link.

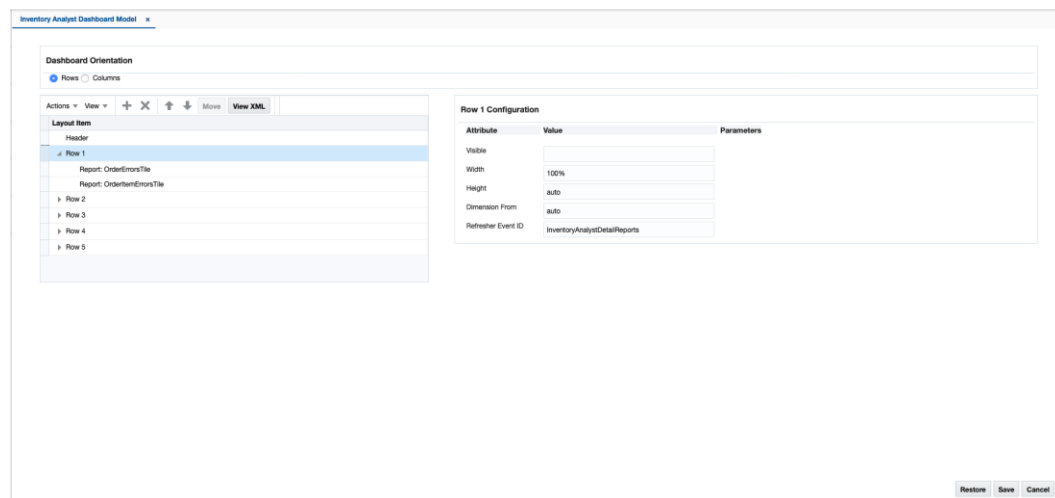


Clicking on the Dashboards option will show you a list of the available dashboards in the Merchandising solution you are logged into. To modify a dashboard, click the appropriate link. This will open the Dashboard Model page for the selected dashboard, as shown below.

In this page, you can add new reports to the dashboard, modify the appearance of existing reports, reorder the reports in the dashboard, or remove the reports from display.

When you click **Save**, your changes will not be immediately reflected in the dashboard if it is open. To see the changes reflected, close the dashboard and reopen it. The **Cancel** button closes the tab without saving the changes. The **Restore** button replaces the customized dashboard with the base product configuration.

Table View



You can also click on the **View XML** button to view the XML version of the dashboard in an XML editor. The XML view contains a **View Tables** button which takes the user back

to the tables view. The XML view also has a **View Revisions** button that allows you to view prior revisions of the dashboard. This should be used to re-apply any customizations you make after a patch is applied, as customizations are not retained during patching.

XML View

```

1 <?xml version="1.0" encoding="UTF-8"?>
2 <dashboard xmlns="urn:www.oracle.com/oracle.retail.apps.framework.dashboard" layout="row">
3 <headerItem id="filter" type="prompt" width="100%" height="auto">
4 <url>WEB-INF/oracle/retail/apps/rms/dashboards/view/inventoryanalyst/flow/inventoryanalystDashboard@PromptFlow.xml#InventoryAnalystDashboard@PromptFlow</url>
5 </headerItem>
6 <vector>
7 <item id="OrderErrorsTitle" type="report" width="83%" height="auto">
8 <url>WEB-INF/oracle/retail/apps/framework/dvtcontextawarereport/publicui/flow/DVTContextAwareReportFlow.xml#DVTContextAwareReportFlow</url>
9 <parameters>
10 <parameter id="taskflowURL">WEB-INF/oracle/retail/apps/rms/dashboards/view/inventoryanalyst/flow/OrderErrorsTitleFlow.xml#OrderErrorsTitleFlow</parameter>
11 <parameter id="parameterName1">departmentId</parameter>
12 <parameter id="paylookKeyName1">departmentName</parameter>
13 <parameter id="parameterName2">classId</parameter>
14 <parameter id="paylookKeyName2">classId</parameter>
15 <parameter id="parameterName3">subclassId</parameter>
16 <parameter id="paylookKeyName3">subclass</parameter>
17 <parameter id="parameterName4">supplierSiteId</parameter>
18 <parameter id="paylookKeyName4">supplierSiteId</parameter>
19 <parameter id="parameterName5">storeId</parameter>
20 <parameter id="paylookKeyName5">storeId</parameter>
21 <parameter id="parameterName6">storeGradeGroup</parameter>
22 <parameter id="paylookKeyName6">storeGradeGroup</parameter>
23 <parameter id="parameterName7">area</parameter>
24 <parameter id="paylookKeyName7">area</parameter>
25 <parameter id="parameterName8">itemBrand</parameter>
26 <parameter id="paylookKeyName8">propBase</parameter>
27 <parameter id="parameterName9">orderType</parameter>
28 <parameter id="paylookKeyName9">orderType</parameter>
29 <parameter id="parameterName10">additionalParameters</parameter>
30 <parameter id="parameterName11">sessionId</parameter>
31 <parameter id="parameterName12">parameterName1</parameter>
32 <parameter id="paylookKeyName12">filterId</parameter>
33 <parameter id="parameterName13">filterId</parameter>
34 <parameter id="paylookKeyName13">filter</parameter>
35 </parameters>
36 </item>
37 </vector>
38 <item id="OrderItemsErrorsTitle" type="report" width="17%" height="auto">
39 <url>WEB-INF/oracle/retail/apps/framework/dvtcontextawarereport/publicui/flow/DVTContextAwareReportFlow.xml#DVTContextAwareReportFlow</url>
40 <parameters>
41 </parameters>
42 </item>
43 </dashboard>

```

Add a Report

If you have created a custom report that you want displayed in a base dashboard, then in the Settings Menu, click on the Dashboards and Reports folder and then the Dashboard folder; then select the dashboard you wish to edit. Click the create icon button (+) in the Layout Item table toolbar, or select Create from the Actions menu. This will display a popup similar to the below:

For the new report item, enter all the required fields in the popup as follows:

Attribute	Description
Layout Item Type	For custom reports, the only valid value is item.

Attribute	Description
Visible	Indicate whether or not you want your report to be visible in the dashboard. Valid values are Yes (true) and No (false). The default when adding a new report will be Yes. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings to determine the visibility of your report. For example, if you want your link only visible to users with the Maintain Items privilege, then you can use the ADF <i>securityContext</i> API <i>isUserInRole</i> method and set this to <code>#{securityContext.userInRole['MAINTAIN_ITEMS_PRIV']}</code> .
Width	Indicates the percentage of the overall width of the dashboard you want your report to be displayed in the dashboard. Usually you will want this to be 100%.
Height	Indicates how tall your report should be in the dashboard in pixels. You can also specify auto if you want the overall size of your report to determine how it is displayed. However, if you have a larger report, this may not be ideal.
Item Type	For custom reports, the only valid value is report.
Report ID	Unique identifier for your custom report. When adding your custom report, make sure that it does not duplicate any of the base IDs.
URL	In order for your report to be refreshed using the dashboard parameters, you will want to use the following for the URL in the popup. <code>/WEB-INF/oracle/retail/apps/framework/contextawarereport/publicui/flow/ViewContextAwareReportFlow.xml</code> <code>#ViewContextAwareReportFlow</code> The actual report will be defined as an attribute parameter (see table below).

Then click OK. You should now see your report listed in the Layout Item table. For your custom report, you will also need to configure some additional attributes and parameters. This is done by clicking the View link next to the URL link in the configuration panel, which results in the View Parameters popup being displayed. Initially this will be blank for a newly added custom report.

Parameter	Value
actionType	DashboardQueryEvent
fallbackUrl	/faces/oracle/retail/apps/framework/contextawarereport/publicui/p...
reportName	Open Order Details
reportDescription	region to servlet testing dashboard contextual events w/o BI depei
iframeHeight	250
primaryUrl	https://merchbi/xmlpserver/~demouser/Custom/ORDER_DETAIL...

Click the **Create** icon button or select **Create** from the Actions menu to add parameters. Below are the recommended minimum parameters that you add for your report:

Attribute	Description
actionType	This should be set to DashboardQueryEvent.
fallbackUrl	Set this to the same value as you used for URL above.
primaryUrl	The full URL for your report. If it is a BI publisher report, your URL might look like this: <a href="https://merchbi/xmlpserver/~demouser/Custom/ORDER_DETAIL.xdo?_xmode=4&_xf=analyze&DeptNo=<Department>">https://merchbi/xmlpserver/~demouser/Custom/ORDER_DETAIL.xdo?_xmode=4&_xf=analyze&DeptNo=<Department> Note that the report URL also includes references to the dashboard filters, in this case department. For a full list of the available parameters for each dashboard, see Dashboard Parameters in the appendix.
reportDescription	This should be a description of the report to be used by a screen reader. Required to ensure your report appears in the dashboard.

Click **OK** to save your changes in the View Parameters popup. Then, click **Save** in the dashboard model page to save your dashboard settings.

To test the configuration, open the dashboard where you added your report to validate that it is displayed as expected.

Modify a Report

If you want to modify a custom report you added previously, you can also do that in the dashboard model page (Settings > Dashboards and Reports > Dashboards) for the applicable dashboard. Also, there are some changes you can make to base reports in this view, with limitations.

Rearrange Reports

If you want to rearrange the order of the reports in a dashboard (base or custom), highlight the report to be moved in the Layout Item table of the appropriate dashboard model page. Then, click on the up or down arrows (↑ ↓) in the Layout Item table

toolbar to move the report up or down. If you want to move the report to a different column or row, then highlight the report to be moved in the Layout Item table of the dashboard model page. Then, click the **Move** button in the Layout Item table toolbar. This will open a popup where you can select the new column or row for your folder or link.

Add a Base Report to Another Dashboard

If you want to add one of the base reports to a different base dashboard, you can do this, provided the parameters required by the report are available in the dashboard filter where you want to add it. The easiest way to do this is to copy the XML for the base report and paste it into the new dashboard's configuration and then update naming or remove any non-required parameters from the configuration that aren't supported in the new dashboard. For example, if you wanted to also display the Incomplete Items report (on the Data Steward dashboard in the base configuration) in the Buyer Dashboard, then you'd do the following:

1. Click on Settings > Dashboards and Reports > Dashboards and open the configuration for the Data Steward dashboard.
2. Click on the View XML button to switch to the XML view.
3. Highlight the full configuration for the report with the ID `IncompleteItems`, including all the parameters and copy the text.
4. Click on Settings > Dashboards and Reports > Dashboards and open the configuration for the Buyer dashboard.
5. Click on the View XML button to switch to the XML view.
6. Paste what you copied from the Data Steward model in this view. Where you copy it will determine where it will be displayed in the dashboard – for example, if you want it displayed first, paste it above the configuration for `DailySales`. This can also be changed later following the instructions above in the Rearrange Reports section.
7. Remove any parameters that are not available in the new dashboard. For this report, that includes parameters 9-16 related to UDA values, location, create dates, item type, item level, transaction level, UDA, and season.
8. Click **Save** to save your changes.

Open the Buyer dashboard to validate that the Incomplete Items report is displayed as expected.

Modify Report Attributes

For custom icons, you can update any of the attributes that are described above under Add a Report. For base reports, it is recommended that you only modify the `Visible` property to hide a report if you do not want it displayed or only want it displayed for users with certain privileges.

Remove a Custom Report

If you want to remove a custom report that you previously added, then, in the appropriate dashboard model page, highlight the report in the Layout Item table and click on the delete iconic button (✕) or select **Delete** from the Actions menu.

Note: It is highly recommended that you don't delete any of the base reports.

Re-apply Dashboard Customizations After Patching

If you have made any customizations to a dashboard, then after a patch update, the changes will be lost. To re-apply your changes after patch updates, follow these steps:

1. From the Settings menu, select Dashboards and Reports and then select the dashboard menu model you wish to update.
2. In the dashboard model page, click the **View XML** button, and then from the XML view, select **View Revisions**.
3. This will open the Dashboard Model Versions page.
4. From here, similar to the Tasks menu, you can view the base version, your customized version, or a comparison of the two. The comparison view highlights your additions and subtractions from the base model.
5. Note the customizations made – you may want to copy to a text editor, highlighting the changes as appropriate – and then click **Back** to return to the Dashboard Model Versions page.
6. Click **Cancel** to return to the Dashboard Model XML View page. Using the highlighted differences from the revision page, reapply your customizations. Then, click **Save**.
7. Open the dashboard that you just updated to validate that your changes have been re-applied.

Contextual Reports

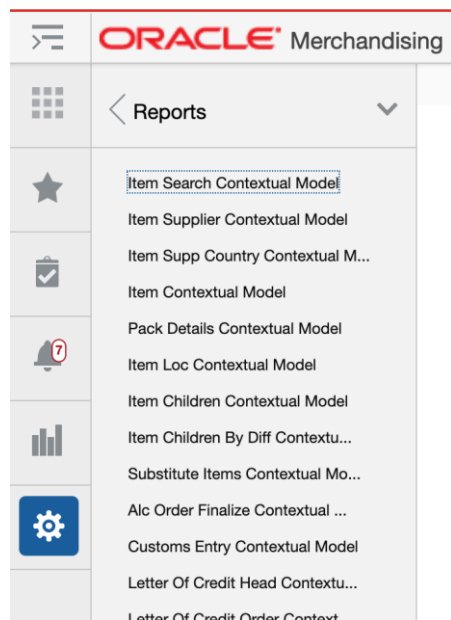
Contextual reports are available in many key workflows throughout the Merchandising suite of solutions to provide additional information to the user of a particular workflow to help in decision making. The reports are considered contextual, as they can use parameters that are published by the workflow in which it is displayed.

The screenshot displays the Oracle Merchandising application interface. The top navigation bar includes the Oracle logo and 'Merchandising' text. The main content area is divided into several sections:

- Search Section:** Contains various search filters such as 'Item', 'Description', 'Transaction Level', 'Item Level', 'Status', 'Item Type', 'Supplier Site', 'VPN', 'Department', 'Class', and 'Subclass'. There are also 'Advanced', 'Saved Search', and 'Default' tabs.
- Results Section:** A table displaying search results for 'Mid Rise Skinny Jean'. The table has columns for Item, Description, Item Level, Department, Class, Subclass, Subclass Name, and Status.
- Item Details Section:** A sidebar on the right showing details for the selected item, including a product image, 'Mid Rise Skinny Jean', '2010 | 3 | 1 Fashion *', and 'Supplied by Fashion Supplier Domestic Site (2000)'. It also lists 'Unit Cost' (89.99 USD) and 'Unit Retail'.

Item	Description	Item Level	Department	Class	Subclass	Subclass Name	Status
100108066	Mid Rise Skinny Jean	Level 1	2010	3	1	Fashion *	Approved
100108131	Mid Rise Skinny Jean:Antique:10	Level 2	2010	3	1	Fashion *	Approved
100108271	Mid Rise Skinny Jean:Classic Wash:10	Level 2	2010	3	1	Fashion *	Approved
100108174	Mid Rise Skinny Jean:Dark Wash:4	Level 2	2010	3	1	Fashion *	Approved

This can also be an area of extensibility, as you are able to configure your own reports as well. This is done through the Settings > Dashboards and Reports > Reports link.

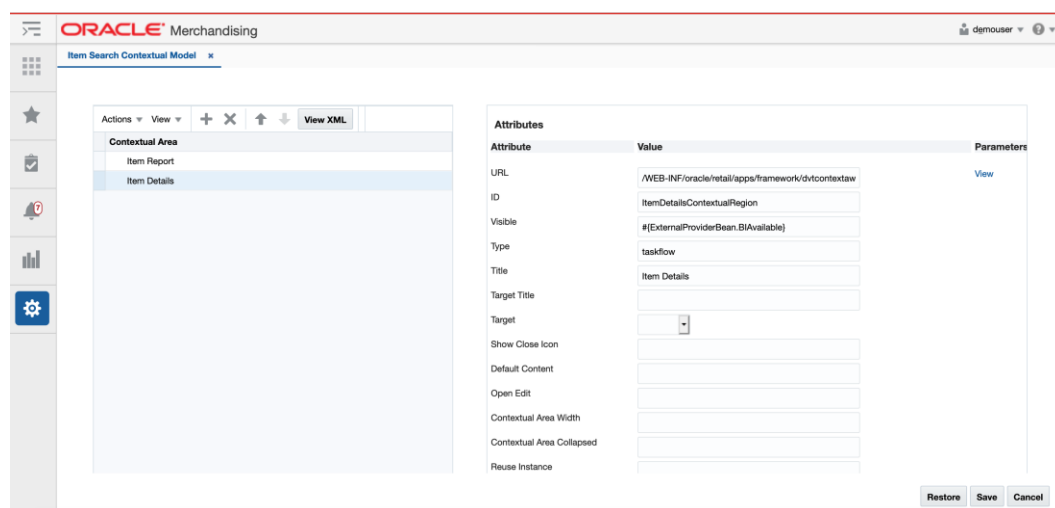


Clicking on this option will show you a list of the available pages for the Merchandising solution you are logged into that have a contextual pane enabled for contextual reports. To add, modify, or remove reports shown in a page’s contextual pane, click the link for the page you wish to modify. This will open the Contextual Model page for a specific workflow.

In this page, you can add new reports to the dashboard, modify the appearance of existing reports, reorder the reports in the contextual pane, or remove the reports from display.

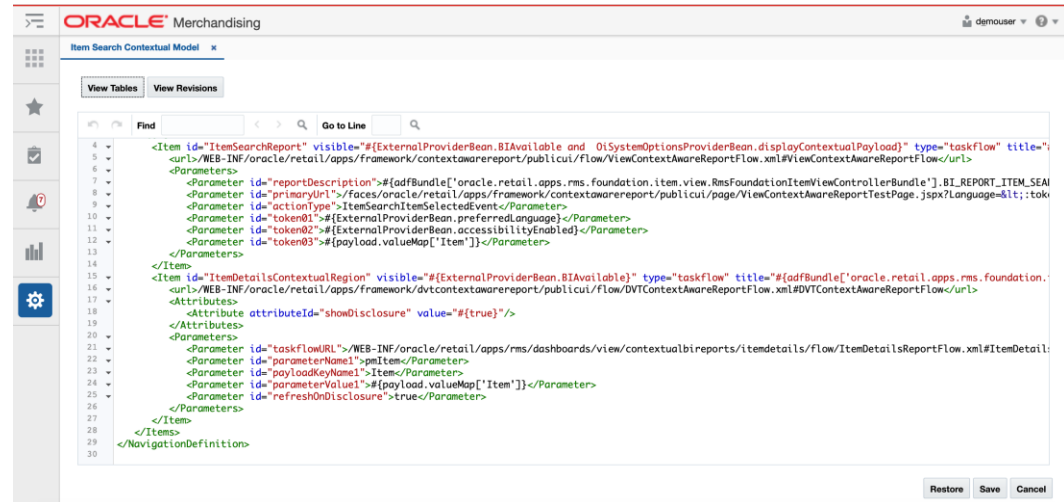
When you click **Save**, your changes will not be immediately reflected in the contextual pane if it is open. To see the changes reflected, close the page with the contextual page you are modifying and re-open it. The **Cancel** button closes the tab without saving the changes. The **Restore** button replaces the customized pane with the base product configuration.

Table View



You can also click on the **View XML** button to view the XML version of the contextual pane in an XML editor. The XML view contains a **View Tables** button which takes the user back to the tables view. The XML view also has a **View Revisions** button that allows you to view prior revisions of the contextual pane. This should be used to re-apply any customizations you make after a patch is applied, as customizations are not retained during patching.

XML View



Add a Report

To add a new report, starting from the contextual model page, click the Create icon (+) or select Create from the Actions menu. This will result in a popup being displayed like shown below.

In the popup, give your report a unique ID, select the type, and enter a business facing title. Then click **OK**. You should now see the new link item in the Contextual Area table. To rearrange the order that the report is displayed in the contextual pane, click on the up and down arrows (↑ ↓) in the Report table toolbar.

Next, you will need to configure your link using the Attributes panel. Alternatively, you can click on the View XML option and configure your report. The following attributes apply for contextual reports:

Attribute	Description
URL	In order for your report to be refreshed using the contextual parameters, you will want to use the following for the URL. <code>/WEB-INF/oracle/retail/apps/framework/contextawarereport/publicui/flow/ViewContextAwareReportFlow.xml#ViewContextAwareReportFlow</code> The actual report will be defined as an attribute parameter (see table below).
ID (id)	Unique identifier for the report. When adding your custom report, make sure that it does not duplicate any of the base IDs.
Visible (visible)	Indicates if the item should be rendered (visible) or not. Valid values are true or false. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings to determine the visibility of your report. For example, if you want your link only visible to users with the Maintain Items privilege, then you can use the ADF <code>securityContext</code> API <code>isUserInRole</code> method and set this to <code>#{securityContext.isUserInRole['MAINTAIN_ITEMS_PRIV']}</code> .
Type (type)	Indicates the type of the item. For contextual reports, this must be taskflow.
Title (title)	Used to provide the user-facing title of the task item in the primary language. Required.

All other attributes are not used or should be left as the default value for custom reports. However, for your custom report, you will also need to configure some additional attributes and parameters. This is done by clicking the **View** link next to the URL link in the configuration panel, which results in the View Parameters popup being displayed. Initially this will be blank for a newly added custom report. Below is an example when the required attributes are added.

The screenshot shows a 'View Parameters' dialog box with a close button (X) in the top right corner. The URL is displayed as `/WEB-INF/oracle/retail/apps/framework/contextawarereport/publicui/flow/ViewContextAwareReportFlow.xml#ViewContextAwareReportFlow`. Below the URL, there are 'Actions' and 'View' dropdown menus, along with '+' and 'X' icons. A table lists the parameters and their values:

Parameter	Value
primaryUrl	https://merchbi/xmlpservlet/~demouser/Custom/ON_ORD_CONTE
actionType	OrderSearchOrderSelectedEvent
reportDescription	Item Quantity Contextual Report

At the bottom right of the dialog, there are 'OK' and 'Cancel' buttons.

Click the **Create** iconic button or select **Create** from the Actions menu to add parameters. Below are the recommended minimum parameters that you add for your report:

Attribute	Description
primaryUrl	The full URL for your report. If it is a BI publisher report, your URL might look like this: <a href="https://merchbi/xmlpserver/~demouser/Custom/ON_ORD_CONTEXT.xdo?_xmode=4&_xf=html&_xpt=1&OrderNo=<Order>">https://merchbi/xmlpserver/~demouser/Custom/ON_ORD_CONTEXT.xdo?_xmode=4&_xf=html&_xpt=1&OrderNo=<Order> Note that the report URL also includes references to the contextual payload values, in this case order number. For a full list of the available parameters for each contextual panel, see Contextual Parameters in the appendix.
actionType	This should be set to an action type appropriate for the workflow where you are adding the report. See Contextual Parameters in the appendix for valid action types for each Merchandising solution and workflow.
reportDescription	This should be a description of the report to be used by a screen reader. Required to ensure your report appears in the contextual panel.



Click **OK** to save your changes in the View Parameters popup. Then, click **Save** in the contextual model page to save your settings.

To test the configuration, open the page where you added your report to validate that it is displayed as expected.

Modify a Report

If you want to modify a custom report you added previously, you can also do that in the contextual model page for the applicable workflow. Also, there are some changes you can make to base reports in this view, with limitations.

Rearrange Reports

If you want to rearrange the order of the reports in a contextual pane (base or custom), highlight the report to be moved in the Contextual Area table of the appropriate model page. Then, click on the up or down arrows ( ) in the Contextual Area table toolbar to move the report up or down.

Add a Base Report to Another Contextual Pane

If you want to add one of the base reports to a different contextual pane, you can do this, provided the parameters required by the report are available in the workflow where you want to add it. The easiest way to do this is to copy the XML for the base report and paste it into the new contextual model configuration and then update the parameters, as needed. For example, if you wanted to display the Item Details contextual report that is in the Item Search contextual pane in the base configuration, and add it to the Franchise Order contextual pane, then you'd do the following:

1. Click on Settings > Dashboards and Reports > Reports and open the configuration for the Item Search Contextual Model.
2. Click on the View XML button to switch to the XML view.
3. Highlight the full configuration for the report with the ID ItemDetailsContextualRegion, including all the parameters and copy the text.
4. Click on Settings > Dashboards and Reports > Report and open the configuration for the Franchise Order Header Contextual Model.
5. Click on the View XML button to switch to the XML view.

6. Paste what you copied from the Item Search model into this view. Where you copy it will determine where it will be displayed in the contextual pane – for example, if you want it displayed first, paste it above the configuration for FranchiseOrderHeadReport. This can also be changed later following the instructions above in the Rearrange Reports section.
7. Remove any parameters that are not available in the new workflow. In this example, none of the parameters need to be updated.
8. Click **Save** to save your changes.

Open the Franchise Order page to validate that the Items Details report is displayed as expected.

Modify Report Attributes

For custom reports, you can update any of the attributes that are described above under Add a Report. For base reports, it is recommended that you only modify the Visible property to hide a report if you do not want it displayed or only want it displayed for users with certain privileges.

Remove a Custom Report

If you want to remove a custom report that you previously added, then, in the appropriate contextual model page, highlight the report in the Contextual Area table and click on the delete iconic button (✕) or select Delete from the Actions menu.

Note: It is highly recommended that you don't delete any of the base reports.

Re-apply Contextual Report Customizations After Patching

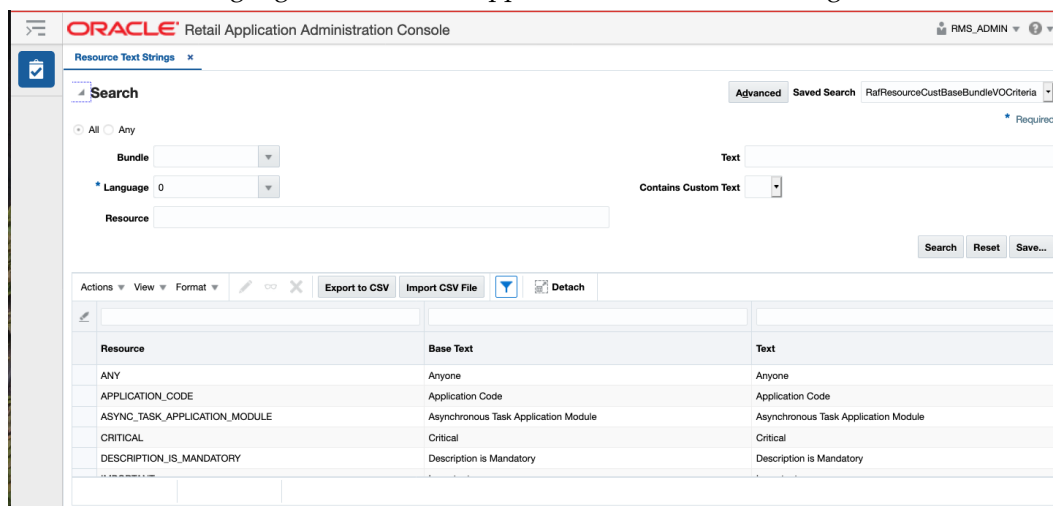
If you have made any customizations to a contextual pane, then after a patch update, the changes will be lost. To re-apply your changes after patch updates, follow these steps:

1. From the Settings menu, select Dashboards and Reports and then select the contextual menu model you wish to update.
2. In the contextual model page, click the **View XML** button, and then from the XML view, select **View Revisions**.
3. This will open the Contextual Model Versions page.
4. From here, similar to the Tasks menu, you can view the base version, your customized version, or a comparison of the two. The comparison view highlights your additions and subtractions from the base model.
5. Note the customizations made – you may want to copy to a text editor, highlighting the changes as appropriate – and then click **Back** to return to the Contextual Model Versions page.
6. Click **Cancel** to return to the Contextual Model XML View page. Using the highlighted differences from the revision page, reapply your customizations. Then, click **Save**.
7. Open the page for the contextual pane you just updated to validate that your changes have been re-applied.


Label Customization

The Resource Bundles option in the customization menu has screens that allow you to customize certain labels, error messages, and list of values used by Merchandising

solutions. The Resource Text Strings option provides a screen to do this customization for your primary language or other supported languages. It can also be used for adding translations for languages that are not supported in the Merchandising solutions.

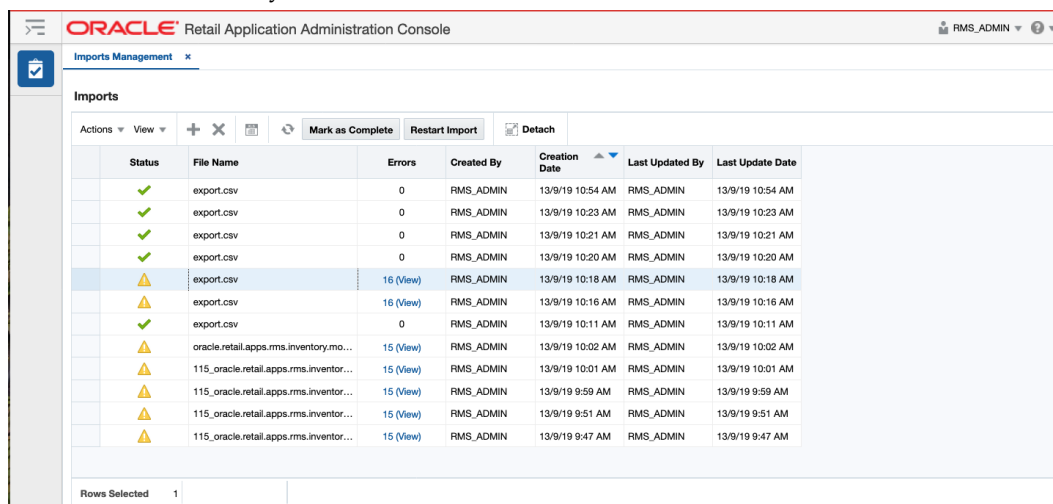


The screenshot shows the Oracle Retail Application Administration Console interface for Resource Text Strings. The top navigation bar includes the Oracle logo and the title 'Retail Application Administration Console'. The main content area is titled 'Resource Text Strings' and features a search section with filters for 'All' or 'Any', 'Bundle', 'Language', and 'Resource'. There are also buttons for 'Advanced', 'Saved Search', and 'RatResourceCustBaseBundleVOCriteria'. Below the search section is a table with columns for 'Resource', 'Base Text', and 'Text'. The table contains several rows of data, including 'ANY', 'APPLICATION_CODE', 'ASYNCH_TASK_APPLICATION_MODULE', 'CRITICAL', and 'DESCRIPTION_JS_MANDATORY'. At the bottom of the table, there are buttons for 'Export to CSV', 'Import CSV File', and 'Detach'.

To update the description, select the language in which you want to make your updates and optionally a partial text string to search for the instances you want to update. Then, click the Edit option in the Actions menu or the iconic button ().

This will open a popup where you can enter your custom text. If there are a lot of strings that require updates, you can also select to export the data to a CSV and then re-import once your changes have been applied.

The other option under Resource Bundles, entitled Imports Management, allows you to view the status of the imported files and any errors that occurred during the re-import process. This screen also allows you to import files and re-process that previously encountered errors, if you believe the issue has been corrected.



The screenshot shows the Oracle Retail Application Administration Console interface for Imports Management. The top navigation bar includes the Oracle logo and the title 'Retail Application Administration Console'. The main content area is titled 'Imports Management' and features a table with columns for 'Status', 'File Name', 'Errors', 'Created By', 'Creation Date', 'Last Updated By', and 'Last Update Date'. The table contains several rows of data, including 'export.csv' files and 'oracle.retail.apps.rms.inventory.mo...' files. At the bottom of the table, there are buttons for 'Mark as Complete', 'Restart Import', and 'Detach'. The 'Rows Selected' count is 1.

See also the [UI Platform Services](#) section for using ReST services for integrating label updates. If you make any changes to labels either using the screens shown here or using the service, you will need to log an SR to get support in activating the changes in your environment as it requires a server restart.

Note: Merchandising also holds a number of labels and error messages in database tables. For information on updating these, see the Codes and Descriptions and Error Messages sections of the *Oracle Retail Merchandising Implementation Guide*. Updates for these two components do not require a server restart.

UI Platform Services

The user interface for the Merchandising solutions has some common components that you may want to use in building custom workflows related to managing user notifications.

These ReST services are packaged as part of the Merchandising solution's Enterprise Archive (EAR) file. Installation of the ReST web services is therefore done by default.

Security

Services are secured using the J2EE-based security model.

- **Realm-based User Authentication:** This verifies users through an underlying Realm. The username and password are passed using HTTP basic authentication.
- **Role-based Authorization:** This assigns users to roles; authenticated users can access the services within the Merchandising suite.
- **The communication between the server and client is encrypted using one-way SSL.** In non-SSL environments the encoding defaults to BASE-64 so it is highly recommended that these ReST services are configured to be used in production environments secured with SSL connections.

Standard Request and Response Headers

The UI platform ReSTful web services have the following standard HTTP headers:

Name	Value	Required	Description
Accept	application/json OR application/xml	Optional. If a response payload is expected instead of just an appropriate HTTP status code	Tells the server the MIME-type of the resource.
Accept-Version	1.8.3	Yes	Depicts which version of the Platform Services is expected.
Accept-Versioning	false	No	Specified in the service request to bypass version validation
Accept-Language	en-US	No	Defaulted by most clients to the destination locale
Content-Type	application/json OR application/xml	Optional. If a request payload is expected. Helps the server determine how to parse the request.	Informs the server during PUT or POST requests, of the format of the payload being sent.
Authorization	Base64 encoded credentials string	Yes	Authenticates a user agent with the server

Depending on the type of the operation or HTTP method, the corresponding response header is updated in the HTTP response with the following codes:

- GET/READ : 200
- PUT/CREATE : 201 created
- POST/UPDATE : 204
- DELETE : 204

Standard Error Response

Example response payload in case of service error is depicted below:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<messagesRDOes>
  <messagesRDO>
    <message>REST Service Version Mismatch</message>
    <messageType>ERROR</messageType>
    <status>BAD_REQUEST</status>
  </messagesRDO>
</messagesRDOes>
```

- **Message:** The error message - translated.
- **MessageType:** Value of 'ERROR' is returned.
- **Status:** For a bad request or error, the status is BAD_REQUEST.
- The http error code for an error response is 400

List of ReST Services

The ReST services exposed by the UI platform are packaged in a separate, deployable artifact. These endpoints are deployed separately from the solution specific services and can be accessed at the following URL:

http://<hostname>/RetailAppsReSTServices/services/private/*

Notifications

Description	URL	HTTP Method
Creating Notifications	/Notifications/create	POST
Updating Notifications	/Notifications/update	PUT
Deleting Notifications	/Notifications/delete/{id}	DELETE
Fetch Notifications	/Notifications/fetch?appCode={appCode}	GET
Get number of unread Notifications	/Notifications/fetch/unreadCount?appCode={appCode}	GET

Description	URL	HTTP Method
Search Notifications	/Notifications/search?appCode={appCode}	GET
Filter Notifications - Return list of Notifications	/Notifications/filter/list	POST
Filter Notifications - Return grouped list of Notifications	/Notifications/filter/group	POST
Filter Notifications - Return a summarized list of Notifications	/Notifications/filter/summarize	POST
Count Notifications matching the filter	/Notifications/filter/count	POST
Persist the Criteria	/Notifications/criteria	POST
Fetch the Criteria	/Notifications/fetch/criteria?appCode={appCode}	GET
Fetch Recipients	/Notifications/fetch/recipients/{id}	GET
Fetch Notification Context	/Notifications/fetch/context/{id}	GET
Fetch Notification Time Periods	/Notifications/fetch/timeperiods?appCode={appCode}	GET
Fetch Notification Hierarchy Levels	/Notifications/fetch/hierarchylevels?appCode={appCode}	GET
Fetch Notification Types	/Notifications/fetch/notificationtypes?appCode={appCode}	GET
Status update for multiple Notifications	/Notifications/update/multiple/status	PUT
Delete multiple Notifications	/Notifications/delete/multiple	POST

Using BI Publisher for Custom Reports

The ability to utilize Oracle Business Intelligence Publisher (BI Publisher) for custom reports is available as part of your Merchandising suite service subscription and is the only option available for creating custom reports against the live production database. Other reporting tools can be used, but must be based on other data sources, such as the replicated data in the data access schema (DAS).

Accessing BI Publisher

In a SaaS implementation, you will access BI Publisher using a URL like this, where the hostname is replaced with that which is relevant for your implementation:

```
https://<hostname>/xmlpserver/servlet/home
```

In order to create reports, you will need to ensure you have the correct privileges assigned to your user ID. Validate your access by clicking on the username in the upper right corner, then select My Account. In the My Account popup click the My Groups tab. You should see the following groups listed:

- BI Consumer
- BI Service Administrator
- BI Content Author

Instructions for configuring these groups can be found here, if you don't have these configured for your user ID:

```
https://docs.oracle.com/middleware/12211/biee/BIESC/GUID-7204D273-79EE-4A1A-BFCD-CF4C137328FE.htm#BIESC671
```

Creating a BI Publisher Report

BI Publisher supports creating a number of different types of reports, including reports with charts, table-based report, and so on. For details on how to create reports in BI Publisher, see the Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher, especially Chapter 2 on creating and editing reports.

As you build your reports consider the input parameters that are available based on where the report will be displayed. Details on the available parameters for dashboards and contextual reports for each of the Merchandising solutions are available in the appendix.

Displaying a BI Publisher Report

Once you have created your report you'll need to identify the URL for the report. The basic URL structure will be

```
http://<hostname>/xmlpserver/<ReportDirectory>/<ReportName>.xdo
```

- `hostname` - will be the hostname for your Merchandising solutions
- `xmlpserver` - this is a static string
- `ReportDirectory` - folder path to the report
- `ReportName.xdo` - the filename you gave the report; if the name has spaces, then use a + between words

You may also specify some BI Publisher formatting parameters for your report. The full list can be found in chapter 2 (Creating and Editing Reports) of the [Oracle Fusion](#)

[Middleware Report Designer's Guide for Oracle Business Intelligence Publisher](#) in the section titled [Specifying Parameters in the URL](#). But, some key ones you may consider to give your reports a similar look and feel to the Merchandising reports are:

- `_xmode` – it's recommended that you set this to 4, which hides the BI Publisher specific banners and parameters – especially for contextual reports
- `_xpt` – this should be set to 1 so that the report doesn't launch a new window

Here's an example of the basic URL with some parameters specified, including the order number parameter, which is an input for this report:

```
https://merchbi/xmlpserver/~demouser/Custom/ORDER_CFAS.xdo?_xmode=4&_xf=html&_xpt=1&OrderNo=<Order>
```

Configuration in Merchandising

Use this URL to configure the report into an existing dashboard or contextual pane as described in the [Dashboards and Reports](#) section.

Appendix A: Dashboard and Contextual Parameters

Dashboard Parameters

In order to embed custom reports in base dashboards and have those reports leverage the data filters, you will want to use them as input parameters in your reports. For any parameters that support multiple values through use of the advanced search option, the parameters will contain all values added in the search separated by commas. For example, in the Buyer dashboard if more than one department is put in the filter, then both of those would be passed in the parameter `departmentIds`. The tables below outline the parameters used for each of the dashboards in the Merchandising solutions for that purpose.

Merchandising

Dashboard	Parameter Displayed Name	Parameter
Buyer	Department	<code>departmentIds</code>
	Class	<code>classIds</code>
	Subclass	<code>subclassIds</code>
	Supplier Site	<code>supplierSiteIds</code>
	Store	<code>storeIds</code>
	Brand	<code>brands</code>
	Country of Sourcing	<code>originCountries</code>
	Order Context	<code>orderContextIds</code>

Dashboard	Parameter Displayed Name	Parameter
Data Steward	Department	departmentIds
	Class	classIds
	Subclass	subclassIds
	Supplier Site	supplierSiteIds
	Country of Sourcing	originCountries
	Created Date	createDates
	Location	locationIds
	Brand	brands
	Item Type	itemTypeId
	Item Level	itemLevelId
	Transaction Level	tranLevelId
	UDA	udaId
	UDA Value	udaValues
	Season	seasonId
Finance Analyst	Set of Books	setOfBooksIds
	Org Unit	orgUnitIds
	Location	locationIds
	Department	departmentIds
	Class	classIds
	Subclass	subClassIds
Inventory Analyst	Department	departmentIds

Dashboard	Parameter Displayed Name	Parameter
	Class	classIds
	Subclass	subclassIds
	Supplier Site	supplierSiteIds
	Area ¹	areaIds
	Store Grade	storeGradeGroupIds
	Store	storeIds
	Brand	itemBrands
	Order Context	orderTypeIds
Inventory Control Analyst	Chain	chainIds
	Area	areaIds
	Location	locationIds
	Supplier Site	supplierSiteIds
	Department	departmentIds
	Class	classIds
	Subclass	subClassIds

Sales Audit

There are no filters on the Sales Audit dashboard.

¹ Either Area or Store Grade are displayed in the filter, depending on the system option setting.

Pricing

Dashboard	Parameter Displayed Name	Parameter
Pricing Analyst	Department	Department
	Class	ClassId
	Subclass	Subclass
	Zone	Zone
	Channel	Channel
	Store	Location
	Supplier Site	SupplierSite
Promotion Planner	Department	Department
	Class	ClassId
	Subclass	Subclass
	Zone	Zone
	Channel	Channel
	Store	Location
	Supplier Site	SupplierSite

Invoice Matching

Dashboard	Parameter Displayed Name	Parameter
Accounts Payable Reviewer	AP Reviewer	ApReviewer

Dashboard	Parameter Displayed Name	Parameter
	Set of Books	SetOfBooks
	Location	Location
	Supplier	Supplier
	Supplier Site	SupplierSite
	Department	Dept
	Class	Class1
	Subclass	Subclass
	Org Unit	OrgUnit
	Document Date	DocDate
	Item	Item

Allocation

Dashboard	Parameter Displayed Name	Parameter
Allocator	Department	DepartmentId
	Class	ClassId
	Subclass	SubclassId

Contextual Parameters

In order to create reports that are contextual to the page in which they are displayed, you will need to use the available parameters for that page and also know which events trigger an update to the parameters. This section outlines what is supported for each of the Merchandising solutions.

Merchandising

For all of the Merchandising contextual panes, there is a report that can be used to help with visibility to the parameters available. This helper report can be configured on during development phases of your program and then configured off in production. It is controlled by the report system option `RMS_OI_SYSTEM_OPTIONS.DISPLAY_CONTEXTUAL_PAYLOAD`.

Here is an example of what the report looks like in the Item workflow:

The screenshot displays the Item workflow interface for SKU 100107112, 'Draw String Cargo:Black:4'. The main pane shows a table of contextual parameters:

Parameter	Value	Parameter	Value	Parameter	Value
Department	2010 Women's Ready to Wear *	Unit Retail	79.99	Sellable	Yes
Class	2 Bottoms *	Unit ELC	24.00	Orderable	Yes
Subclass	1 Pants *	Markup %	70.00	Inventoried	Yes
Transaction Level	SKU	Currency	USD		

Below the table is a 'Descriptions' section. To the right, an 'Item Report' pane displays the following data:

```

Item=100107112
Accessibility_Flag=false
Language=en

```

Additionally, all the Merchandising contextual models support the following two parameters:

- Accessibility flag (`accessibilityEnabled`) – indicates whether or not the user has turned on Screen Reader mode
- Preferred Language (`preferredLanguage`) – indicates what is the language that the user selected in User Preferences

Other parameters are dependent on the associated workflow and are described below.

Contract Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Contract	Contract Item Contextual Model	ContractItemEvent	Contract page is loaded	ContractNum Supplier StartDate EndDate Status ContractCurrency DisplayCurrency
			Items table row is selected	ContractNum Item ItemParent Diff1 Diff2 Diff3 Diff4
			Items Details table row is selected	ContractNum Item Location ReadyDate
Orders for Contracted Items	Contract Item Order Item Contextual Model	ContractedOrderItemEvent	Orders table row is selected	ContractNum Item Location Supplier OrderType
			Items table row is selected	ContractNum Item

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
			Locations table row is selected	ContractNum Item Location

Cost Change Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Cost Change By Item	Cost Change By Item Contextual Model	CostChangeItemSelectedEvent	Item table row is selected	CostChangeId Item Supplier OriginCountry EffectiveDate DisplayCurrency RandomNo
Cost Change By Item Location	Cost Change By Item Location Contextual Model	CostChangeItemLocSelectedEvent	Item Location table row is selected	CostChangeId Item Location Supplier OriginCountry EffectiveDate DisplayCurrency RandomNo

Deals Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Deal	Deal Head Contextual Model	DealHeadEvent	Components table row is selected	DealId Supplier/Partner DealCompId DealCurrency DisplayCurrency
			Deal page is loaded	DealId Supplier/Partner DealCurrency DisplayCurrency
Fixed Deal	Fixed Deal Head Contextual Model	FixedDealHeadEvent	Fixed Deal page is loaded	DealId Supplier/Partner DisplayCurrency
			Fixed Deal page is loaded	Supplier/Partner DisplayCurrency

Franchise Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Franchise Order	Franchise Order Head Contextual Model	FranchiseOrderEvent	Franchise Order page is loaded	WfOrderNo Customer
			Items table row is selected	WfOrderNo Item SourceLocation CustomerLoc

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Franchise Return	Franchise Return Head Contextual Model	FranchiseReturnHeadLoadEvent	Franchise Return page is Loaded	RMANum
		FranchiseReturnItemSelectionEvent	Items table row is selected	WfOrderNo Item

Import Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
ALC Finalization	ALC Order Finalize Contextual Model	AlcOrderFinalizeSelectionEvent	ALC Finalization results row selected.	Shipment Order
Customs Entry	Customs Entry Contextual Model	CustomsEntryLoadEvent	Customs Entry page is loaded	CustEntryId
Letter Of Credit	Letter Of Credit Head Contextual Model	FinalizeTransportationValueChangeEvent	Letter Of Credit Head page is loaded	VesselId VoyageFlightID EstDepartureDate
Letter Of Credit Order Selection	Letter Of Credit Order Contextual Model	LetterOfCreditHeadLoadEvent	Letter Of Credit Order table row is selected	LCReferenceNum
Obligation	Obligation Contextual Model	LetterOfCreditOrderSelectionEvent	Obligation page is Loaded	Order Applicant Bank
Finalize Transportation	Finalize Transportation Contextual Model	ObligationLoadEvent	On value change of vessel, voyage flight, or estimated departure date	ObligationId
Transportation	Transportation Contextual Model	TransportationLoadEvent	Transportation page is loaded.	TransportationId

Item Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Item	Item Contextual Model	ItemSelectedEvent	Item page is loaded	Item
Item Children	Item Children Contextual Model	ItemChildSelectedEvent	Item Children table row selected.	Item
Item Children By Diff	Item Children By Diff Contextual Model	ItemChildDiffSelectedEvent	Item Children By Diff table row is selected.	Item
Item Location	Item Location Contextual Model	ItemLocSelectedEvent	Location table row is selected	Item Location
Item Location Inventory	Item Location Inventory Contextual Model	ItemLocInventorySelectionEvent	Item Location Inventory table row is selected	Item Location
Item Search	Item Search Contextual Model	ItemSearchItemSelectedEvent	Item Search results table row is selected	Item
Item Supplier	Item Supplier Contextual Model	ItemSupplierSelectedEvent	Supplier row selected.	Item Supplier
Item Supplier Country	Item Supplier Country Contextual Model	ItemSuppCountrySelectedEvent	Country of Sourcing row selected.	Item Supplier OriginCountry
Pack Details	Pack Details Contextual Model	PackDetailsSelectionEvent	Packs By Component table row selected.	Item
Related Item	Related Item Contextual Model	RelatedItemSelectedEvent	Related Items table row is selected	Item
Sales Issues By Location	Sales Issues By Location Contextual Model	SalesIssuesByLocSelectionEvent	Sales Issues By Location table row is selected	Item Location

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Simple Pack Item	Simple Pack Item Contextual Model	SimplePackItemSelectedEvent	Simple Pack Setup table row is selected	Item

Purchase Order Workflows

ADF Bundle: oracle.retail.apps.rms.procurement.view.RmsProcurementViewControllerBundle

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Order Detail	Order Detail Contextual Model	OrderDetailEvent	Allocations table row is selected	Order Item Location PhysicalWH Allocation DisplayCurrency DisplayUOM
			Items table row is selected	Order Item ItemParent Diff1 Diff2 Diff3 Diff4 OrderCurrency DisplayCurrency DisplayUOM

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
			Locations table row is selected	Order Item Location DisplayCurrency DisplayUOM
Order Distribution	Order Distribution Item Contextual Model	OrderDistItemSelectionEvent	Order Distribution table row is selected	Order Item Supplier Location
Order	Order Header Contextual Model	OrderHeadLoadEvent	Order page is Loaded	Order Supplier ImportInd Department Location Status OrderCurrency OrderType
Order Search	Order Search Contextual Model	OrderSearchOrderSelectedEvent	OrderSearchOrderSelectedEvent: Order Search results table row is selected	Order Supplier Status Currency

Replenishment Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Buyer Worksheet	Buyer Worksheet Contextual Model	BuyerWorksheetSelectionEvent	Table row is selected	Item Supplier SourceType Location DisplayCurrency
Replenishment Attributes	Replenishment Attribute Contextual Model	ReplAttributeLoadEvent	Replenishment Attribute page is loaded	Item Location
Replenishment Attribute Search	Replenishment Attribute Search Contextual Model	ReplAttributeSearchSelectionEvent	Replenishment Search results table row is selected	Item Location
Substitute Items	Substitute Items Contextual Model	SubstituteItemSelectedEvent	Substitute Items table row is selected.	Item SubstituteItem

RTV Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Return To Vendor	Return To Vendor Head Contextual Model	ReturnToVendorEvent	Item table row is selected.	Rtv Item Location Supplier DisplayCurrency InventoryStatus DisplayUOM

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
			Return to Vendor page is loaded.	Rtv Location Supplier Status DisplayCurrency DisplayUOM

Shipment and Receipt Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Receipt Adjustment by Cost	Receiver Cost Adjustment Item Contextual Model	ReceivingCostAdjItemSelectionEvent	Receipt Adjustment By Cost page table row is selected	Order Supplier Department Item Location DisplayCurrency
Shipment	Shipment Head Contextual Model	ShipmentPageEvent	Details table row is selected	Shipment Item Carton

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
			Shipment page is loaded.	Shipment ASN BOL EstArrivalDate InvMatchDate ReceiveDate ShipDate NotBeforeDate NotAfterDate ToLoc Status
Shipment Search	Shipment Search Contextual Model	ShipmentSearchSelectionEvent	Shipment Search results table row is selected	Shipment Order BOL ToLoc
Stock Order Reconciliation	Stock Order Exception Detail Contextual Model	StockOrderExceptionEvent	Carton Level Dispositions table row is selected	Carton Shipment BOL FromLoc ToLoc
			Stock Order Exceptions table row is selected	BOL FromLoc ToLoc Shipment

Stock Count Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Stock Count Results	Stock Count Results Contextual Model	StockCountResultsSelectionEvent	Items and Count Locations tables row is selected	StockCountId Item Location
Unit Variance and Adjustment	Unit Var Adjustment Location Contextual Model	UnitVarianceAndAdjustmentEvent	Details table row is selected	StockCountId Location Department Class SubClass
			Location table row is selected	StockCountId Location Item
Value Variance and Adjustment	Value Var Adjustment Location Contextual Model	ValueVarAdjLocSelectionEvent	Value Variance and Adjustment tables row is selected	StockCountId Location
Virtual Warehouse Distribution	Virtual Warehouse Distribution Contextual Model	VirtualWhDistSelectionEvent	Physical Warehouse/Items table row is selected	StockCountId Item PhysicalWh

Transfer Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Mass Return Transfer	Mass Return Transfer Head Contextual Model	MassReturnTransferEvent	Mass Return Transfer page is loaded	MRT Warehouse Status Supplier DisplayCurrency
			Item table row is selected	MRT Item DisplayCurrency
			Locations table row is selected.	MRT Item Location DisplayCurrency
Transfer Details	Transfer Detail Contextual Model	TransferDetailSelectionEvent	Transfer Details table row is selected	Transfer Item ItemParent Diff1 Diff2 Diff3 Diff4 InventoryStatus FromLoc ToLoc Finisher DisplayCurrency DisplayUOM DisplayLeg

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Transfer	Transfer Head Contextual Model	TransferHeadLoadEvent	Transfer page is loaded	Transfer FromLoc ToLoc Finisher Status DeliveryDate
Transfer Search	Transfer Search Contextual Model	TransferSearchSelectionEvent	Transfer search results table row is selected	Transfer FromLoc ToLoc Finisher Status

Sales Audit

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Store Day Search	Store Day Search Contextual Model Name	OnloadEvent	Store Day Search page is loaded	val1 (Store)
Store Day Search	Store Day Search Contextual Model Name	OverShortHistorySelectedEvent	When a user selects a row in the results table	val1 (Store)
Store Day Summary	Maintain Store Day Contextual Model Name	OnloadEvent	Store Day Summary page is loaded	val1 (Store) val3 (Store Sequence Number) currency

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Transaction	Maintain Transaction Contextual Model Name	TableSelectedEvent	The user selects an item in the Item table	val1 (Store) val2 (Transaction Sequence Number) itemSeqNo item
Tender Summary	Tender Summary Contextual Model Name	TableSelectedEvent	Results are returned in the Tender Summary page	val1 (Store) currency

Pricing

Workflow	Contextual Model Name	Action Type	Event	Parameters
Price Change Group	Price Event Contextual Area	PriceChangeItemSelectedEvent	When the user selects a row in the price change group maintenance screen.	Item ItemDesc DiffDesc Location LocationDesc LocationType ZoneDisplayId ZoneDesc Currency BatchGenExcl RandomNo

				ZoneID PeType (PC, CLR) MaintItemWsId ² MaintLocWsId ³
Clearance Group	Price Event Contextual Area	PriceChangeEventItemSelectedEvent	When the user selects a row in the Clearance group maintenance screen.	Item ItemDesc DiffDesc Location LocationDesc LocationType ZoneDisplayId ZoneDesc Currency BatchGenExcl RandomNo ZoneID PeType (PC, CLR) MaintItemWsId MaintLocWsId
Price Inquiry	Price Event Contextual Area	PriceInquiryItemSelectedEvent	When the user selects a row in the Price Inquiry Search screen.	Item ItemDesc Location LocationDesc

² Row ID in the item table.

³ Row ID in the location table.

				LocationType Currency SearchStartDate SearchEndDate ActionDate LocationPricing WorkspaceId ⁴ Application ⁵
Conflicts	Price Event Contextual Area	PriceChangeItemSelectedEvent	When the user selects a row in the Conflict Check Error Maintenance screen.	ConflictId RandomNo

⁴ Maps to the column in the table for a particular search in Price Inquiry.

⁵ Used for identifying Pricing as the solution where a report is displayed for cases where the same report is displayed in both Pricing and Merchandising or another solution.

Invoice Matching

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Summary Match - Detail Match Item View	Detail Match Contextual Area	DetailToleranceRange	When the user enters the Detail Match screen.	SessionId WorkspaceId lang locale accessibility ItemViewId InvItemViewId RowType (STYLE, SKU, INVC, RCPT) StagedPayloadId
Summary Match - Detail Match Item View	Detail Match Contextual Area	qtyComparison	When a user clicks on an item in the item table in Detail Match.	SessionId WorkspaceId lang locale accessibility ItemViewId InvItemViewId RowType (STYLE, SKU, INVC, RCPT) StagedPayloadId

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Summary Match - Detail Match Item View	Detail Match Contextual Area	costComparison	When a user clicks on an item in the item table in Detail Match.	SessionId WorkspaceId lang locale accessibility ItemViewId InvItemViewId RowType (STYLE, SKU, INVC, RCPT) StagedPayloadId
Discrepancy Review List	Discrepancy List Contextual Area	suppSiteEventBinding	When a user clicks in a row in the search results table.	siteId (supplier site) sessionId lang locale accessibility
Discrepancy Review List	Discrepancy List Contextual Area	qtyEventBinding	When a user clicks in a row in the search results table.	workspaceId discViewId sessionId item lang locale accessibility
Discrepancy Review List	Discrepancy List Contextual Area	costEventBinding	When a user clicks in a row in the search results table.	workspaceId discViewId sessionId item lang locale accessibility

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Summary Match - Invoice Summary Match	Summary Match Contextual Area	SummaryToleranceRange	When a user clicks on an item in the table in Summary Match.	siteId (supplier site) sessionId workspaceId stagedPayloadId lang locale accessibility
Summary Match - Invoice Summary Match	Summary Match Contextual Area	supplierSiteEvent	The user enters the Summary Match screen.	siteId (supplier site) sessionId stagedPayloadId lang locale accessibility

Allocation

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Allocation Maintenance (What-if Allocation only)	Allocation Maintenance Contextual Area	itemSourceSelectionEvent	The user selects a row in the Review table	sessionId allocId item diff1 diff2 diff3 diff4

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Allocation Maintenance	Allocation Maintenance Contextual Area	itemLocSelectionEvent	The user selects a row in the Location table	sessionId location item diff1 diff2 diff3 diff4
Allocation Maintenance	Allocation Maintenance Contextual Area	itemForecastSelectionEvent	The user selects a row in the Location table	sessionId item diff1 diff2 diff3 diff4 location locType



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