

# Oracle® Retail Allocation Cloud Service

## Do the Basics User Guide



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Oracle Retail Allocation Cloud Service/Allocation Do the Basics User Guide, Release 24.0.101.0

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

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# Preface

This document describes the Oracle Retail Allocation user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

## Audience

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

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- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

## Improved Process for Oracle Retail Documentation Corrections

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

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

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

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

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

## Oracle Retail Documentation on the Oracle Help Center (docs.oracle.com)

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

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

(Data Model documents are not available through Oracle Help Center. You can obtain these documents through My Oracle Support.)

## Conventions

The following text conventions are used in this document:

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

# 1

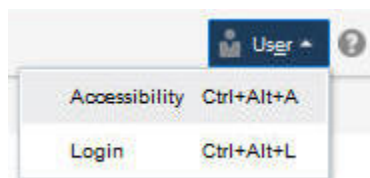
## Log In and Out

### Log on to the Application

To log on to the application:

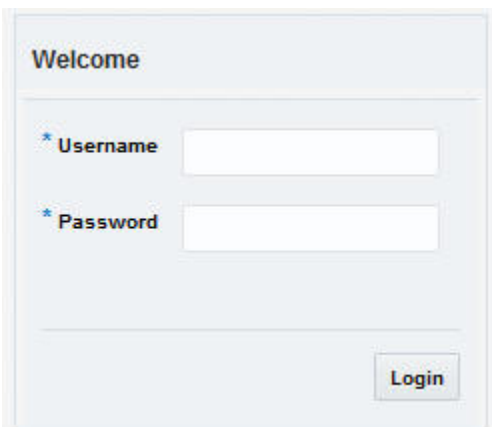
1. Click the **User** list which is to the top right of the Oracle Retail Allocation window.

**Figure 1-1 User List Screen**



2. Click **Login**. The Welcome screen appears.

**Figure 1-2 Welcome Screen**



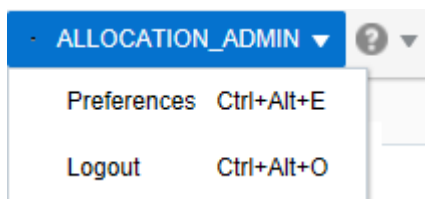
3. Provide the following login information:
  - a. Enter your user name in the **Username** field.
  - b. Enter your password in the **Password** field.
4. Click **Login**.

### Log Out of the Application

Use the **User** list menu, which is to the top right of the Oracle Retail Allocation window, to log out of the application.



**Figure 1-3 Logging Out of the Application**



# 2

## User Help

This application contains an online HTML help that can guide you through the user interface. User information is included to describe high-level processes and procedures, as well as provide step-by-step instructions for completing a task.

You can access online help for a particular page by clicking on the Help link at the top of the application home page or by clicking the Help icon on every page of the application. Once in the help, you can access additional information through the table of contents or by using the index.

# 3

## Common Actions and Icons

Oracle Retail applications, such as the, Oracle Retail Allocation, include some common interface options and controls that you can use throughout the application workflow. The following sections describe these user interface controls in more detail.

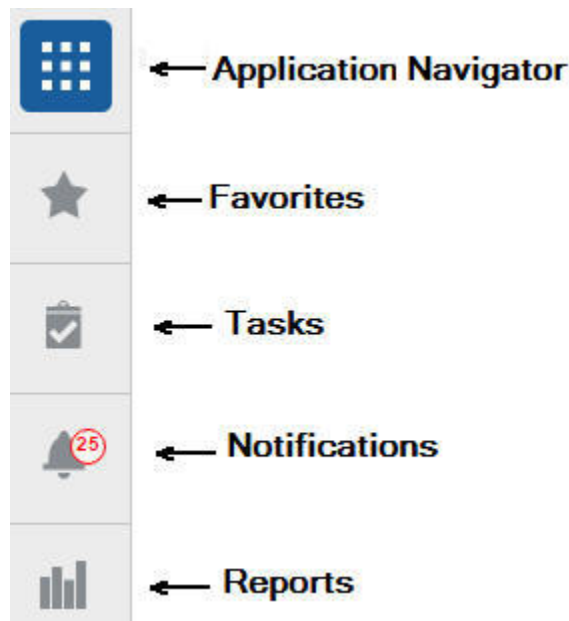
Although you may have more than one Oracle Retail application installed on your system, each application may use many of the same interface components and abide by common rules and constraints.

You can quickly access the tasks of current applications and switch to other applications from the Navigation bar. For more information on the Navigation bar, see the [Task Bar Options](#) section.

### Task Bar Options

You can quickly access the tasks of current applications and switch to other applications from the Navigation bar.

**Figure 3-1** Navigation Bar



The following navigation bar options are common across all the applications:

- Application Navigator
- Favorites
- Tasks

- Notifications
- Reports

## Application Navigator


The Application Navigator is optional for the application and provides the ability to switch between applications.



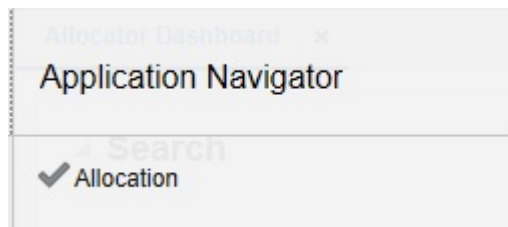
### Note:

Your view may vary, depending upon the features selected during the setup process.

To switch between applications:

1. At the top left of the application, click the Application Navigator  icon to open the list of available applications.

**Figure 3-2 Application Navigator**

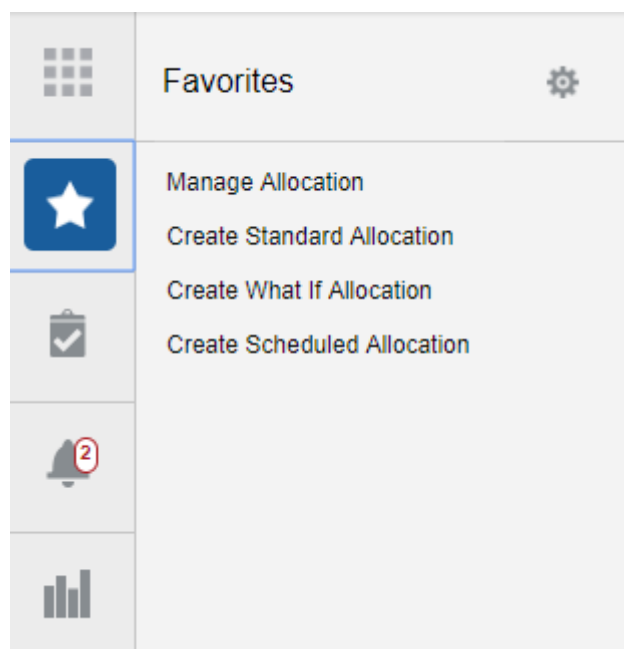


2. Select the listed applications. The application will open in a new tab.

## Favorites

You can select your favorite tasks without accessing the Tasks menu. It helps you quickly get into your frequently used tasks.

You can click the Favorites icon in the Tasks menu to access tasks designated as favorites. You can also select the cog icon from the Favorites menu to edit the favorite list. Tasks can be selected or deselected as favorites in the Tasks menu.

**Figure 3-3 Favorites Area**

## Tasks

Oracle Retail applications support a variety of navigational tools and methods that allow you to move efficiently between application pages. Information on how to use and manage each of the tools and methods is included in this section.

A task is a set of links to a series of task flows organized in a specific sequence to accomplish a business process or procedure. For example, tasks can be defined for common multi-step procedures or processes so that you can quickly step through tasks. By navigating sequentially to the pages outlined in the task, you are assisted in stepping through the business process or activity.

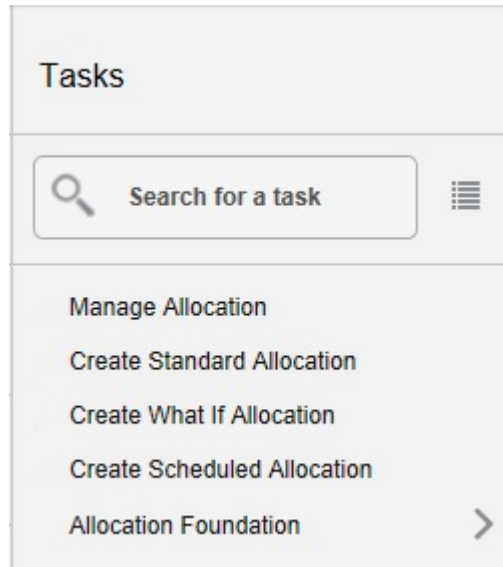
Your Tasks list appears on the top left side of the home page. All of the tasks to which you have access are listed on the Tasks window. You can either click on the specific task name to open, or use the Task Search component to search for a Task that you want to open.

To begin working with a task, choose the application feature or process from the list.

**Note:**

Your task menu may appear slightly different, depending on your retail application.

Figure 3-4 Tasks Menu



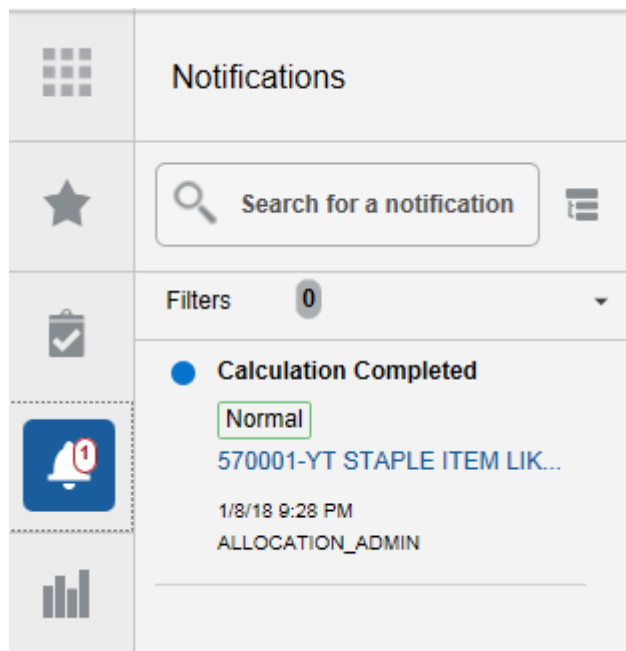
## Notifications

Notifications bring events within the application to your attention.

See the following examples:

- A simple, informative message indicating a long-running process has completed
- A message indicating a critical exception has occurred

Figure 3-5 Notifications

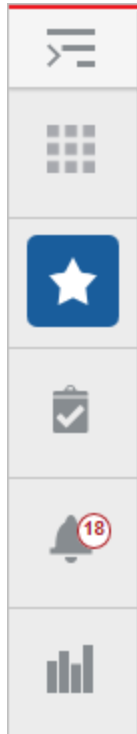


## Notification Badge

The Notification Badge displays the number of unread notifications for the user in the sidebar menu. The Notification Badge displays '99+', when there are more than 99 notifications.

The notification count is periodically refreshed at regular intervals. This interval is determined by a system-configured value.

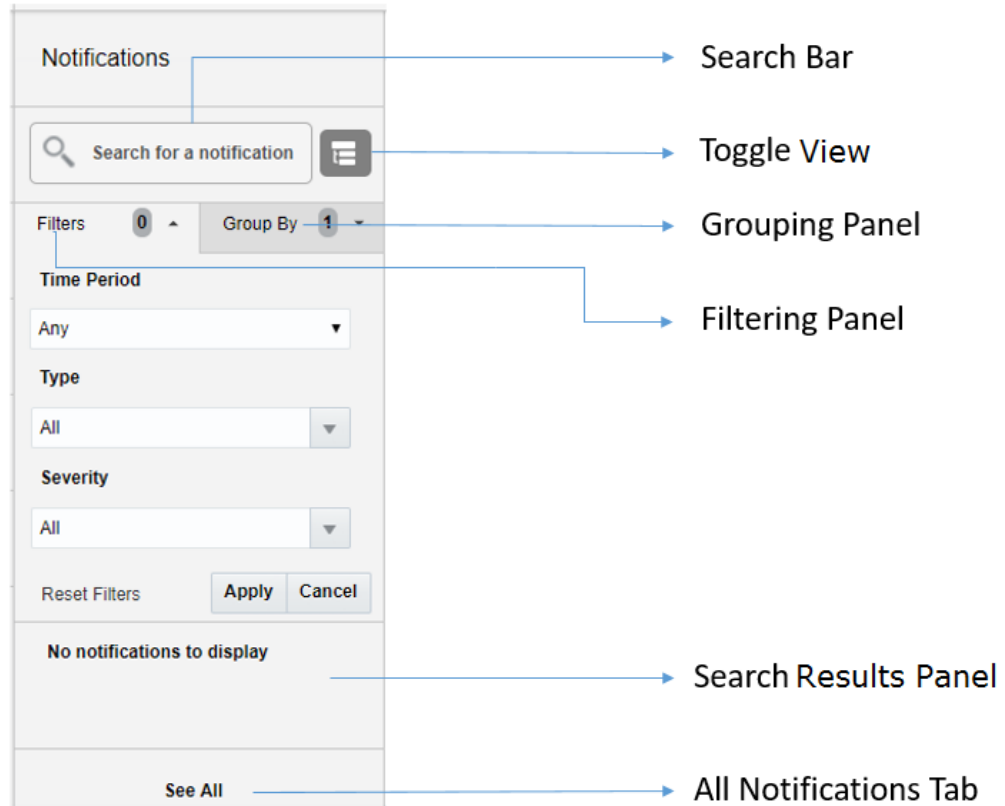
**Figure 3-6 Notification Badge**



## Notification Sidebar

When you click the Notification icon, the Notifications Sidebar is shown displaying the most recent set of unread notifications (depending on the filter set).

Figure 3-7 Notifications Sidebar



Each component of the Notifications Sidebar is discussed in detail in the following sections:

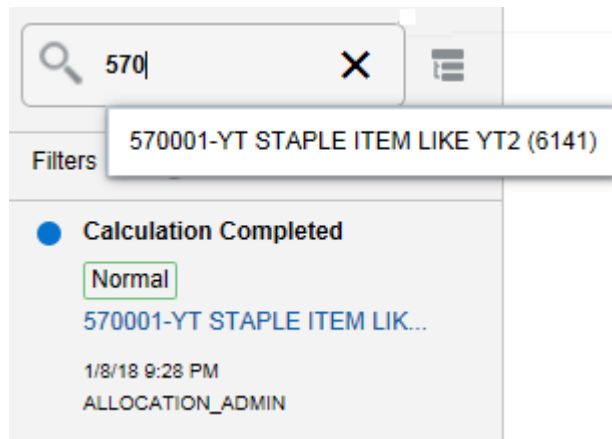
## Search Bar

A search bar at the top of the panel allows for searching through notifications. The search bar has auto-suggest enabled, so it displays notifications as the user types.

Right next to the search bar is the 'List/Group' view toggle button. This causes the Notification results to be displayed either in a flat or grouped view.



Figure 3-8 Search Bar



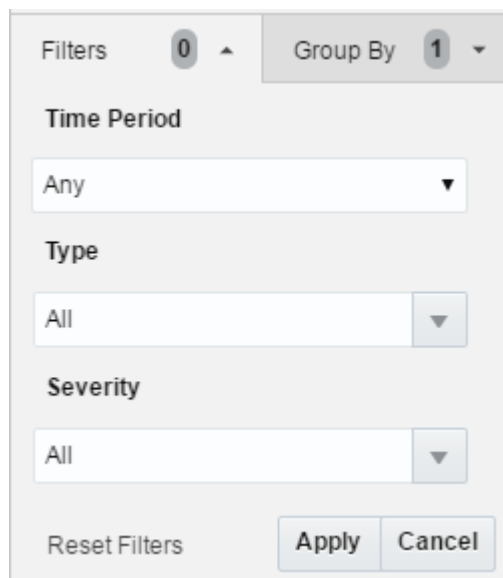
## Filtering Panel

The Filtering Panel allows you to filter notifications based on Creation time, Severity and Type.

The values for the Time Periods and Severity components are pre-seeded constants. The Type drop-down lists all the notification types available in the system.

When you click the **Apply** button, notifications that match the criteria are shown in the Results Panel.

Figure 3-9 Filtering Panel

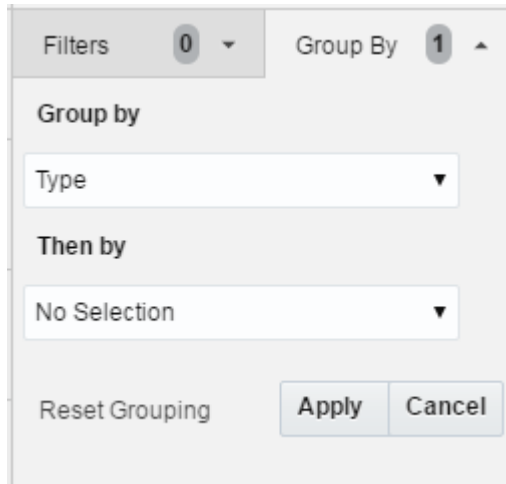


## Grouping Panel

This panel allows you to group notifications based on different attributes.

The values of the 'Group by' and the 'Then by' components are pre-seeded.

**Figure 3-10 Grouping Panel**

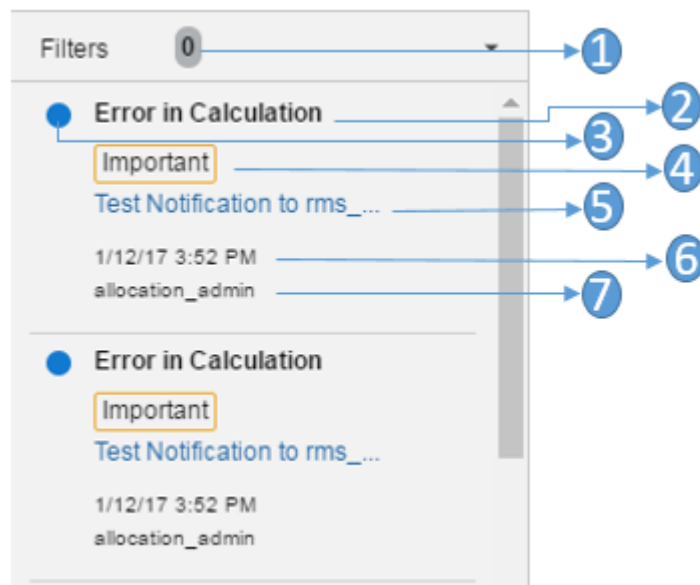


## Results Panel - List View


When no selection is made in the Grouping Panel, the Results Panel displays notifications in a list format.

The image below shows a simple search without any filtering or grouping.

**Figure 3-11 Results Panel - List View**



1. Indicates that no filtering was done.

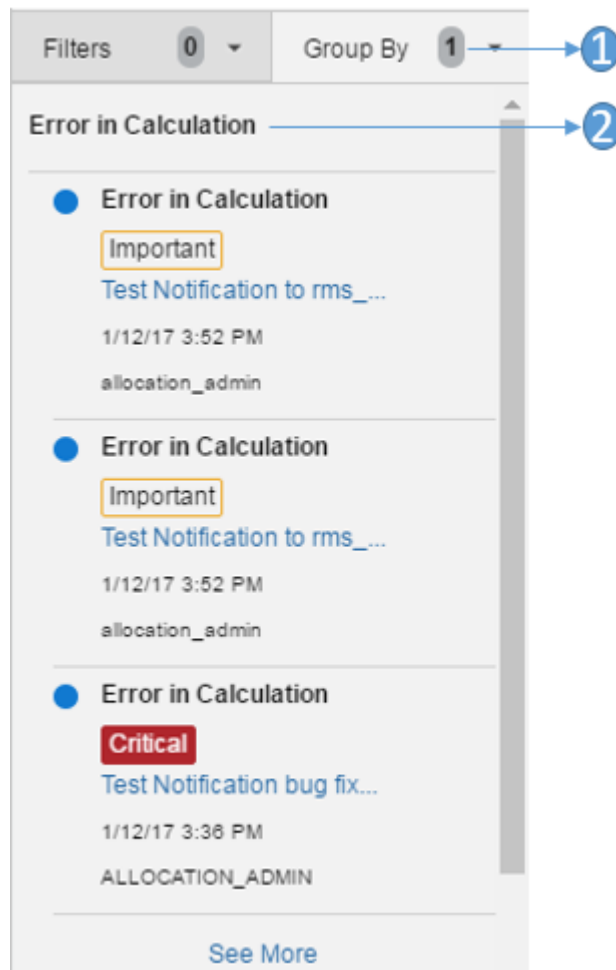
2. Notification Type - A description of the Type is displayed.
3. Read/Unread - A blue icon  is shown next to the notification if it is unread.
4. Notification Severity - A colored label indicating the severity of the notification is shown.
5. Description - The description associated with the notification. If the notification was designed to launch into a relevant flow, then this is displayed as a link. Otherwise, the description is rendered as plain text.
6. Creation Time - A timestamp that shows the date and time at which the notification was created.
7. User name - Creator of the notification.

## Results Panel - Grouped View

Notifications are displayed in a grouped format within the Results Panel, when the Group By drop-down in the Grouping Panel is selected.

Notifications are displayed in groups with three notifications shown for each group.

**Figure 3-12 Results Panel - Grouped View**



1. Indicates the Group-By drop-down is selected on the Grouping Panel.
2. The value of the Group-By attribute. In this example, the results were grouped by Notification Type. Hence the Notification Type is shown as the header of the group.

For each group, three notifications are shown, followed by a 'See More' link. When you click this link, up to 25 notifications are displayed for that group.

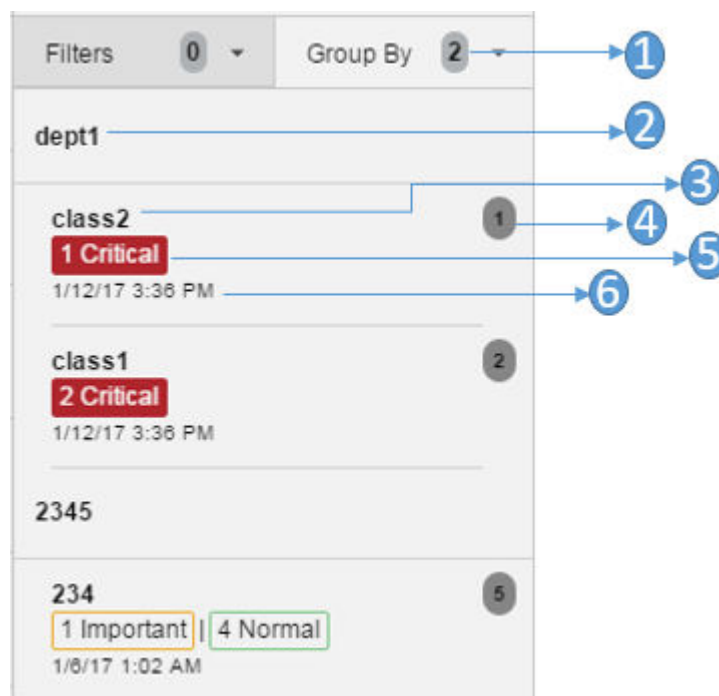
## Results Panel - Summarized View

Notifications are summarized as shown in this example, when both the Group By and the Then By drop-downs in the Grouping Panel are selected.

The summary view displays various groups and within them subgroups, based on the selections on the Grouping Panel. For each subgroup, a count of the notifications within that subgroup, grouped by severity is displayed.

The example below depicts a grouping by department, then by class.

**Figure 3-13 Results Panel - Summarized View**



1. Indicates that both options on the Grouping Panel have been selected.
2. First level of grouping is by Department. Here the first department shown is 'dept1'.
3. The subgroup within department 'dept1'. In this example, this is the Class name.
4. The number of notifications within that combination of Group and Subgroup.
5. A grouping by severity of all notifications within that combination of Group and Subgroup.

- The timestamp of the most recent notification of that combination of Group and Subgroup.

## All Notifications Tab

The All Notifications tab is shown when you click the 'See All' link at the bottom of the Notifications side panel.

**Figure 3-14 All Notifications**

Severity	Status	Description	Type	Recipients	Creation Date	Created By	Last Updated Date	Last Updated By
Normal	<input checked="" type="radio"/>	570001-YT STAPLE ITEM LIKE YT2	Calculation Completed	ALLOCATION_ADMIN	1/8/18 9:28 PM	ALLOCATION_ADMIN	1/9/18 2:52 AM	ALLOCATION_ADMIN
Normal	<input type="radio"/>	560001-YT	Calculation Failure	ALLOCATION_ADMIN	1/8/18 3:09 AM	ALLOCATION_ADMIN	1/8/18 3:10 AM	ALLOCATION_ADMIN
Normal	<input type="radio"/>	560001-YT	Calculation Completed	ALLOCATION_ADMIN	1/5/18 12:56 AM	ALLOCATION_ADMIN	1/5/18 12:57 AM	ALLOCATION_ADMIN
Normal	<input type="radio"/>	560001-YT	Calculation Completed	ALLOCATION_ADMIN	1/5/18 12:38 AM	ALLOCATION_ADMIN	1/5/18 12:40 AM	ALLOCATION_ADMIN
Normal	<input type="radio"/>	560001-YT	Calculation Failure	ALLOCATION_ADMIN	1/5/18 12:36 AM	ALLOCATION_ADMIN	1/5/18 12:37 AM	ALLOCATION_ADMIN
Normal	<input type="radio"/>	560001-YT	Calculation Completed	ALLOCATION_ADMIN	1/5/18 12:33 AM	ALLOCATION_ADMIN	1/5/18 12:34 AM	ALLOCATION_ADMIN
Normal	<input type="radio"/>	550001-YT FI	Calculation Failure	ALLOCATION_ADMIN	1/4/18 7:18 PM	ALLOCATION_ADMIN	1/5/18 12:30 AM	ALLOCATION_ADMIN
Normal	<input type="radio"/>	535003-Child of 530002	Calculation Completed	ALLOCATION_ADMIN	12/27/17 10:18...	ALLOCATION_ADMIN	1/2/18 12:58 AM	ALLOCATION_ADMIN

This tab lists all the Notifications for the logged-in user, regardless of whether they are in Read or Unread status. Information tiles display a break-up of the total notifications by severity. Clicking these tiles refreshes the table below to display only those notifications that are relevant to that tile.

You can perform the following operations from this tab.


- Delete - The table allows for multiple selection and hence multiple notifications can be deleted at a time. Use the row header to select the row.
- Refresh - This refreshes the list of notifications in the table.
- Mark as Read - Multiple Unread Notifications can be marked as Read by clicking this button.
- Mark as Unread - Multiple Read Notifications can be marked as Unread by clicking this button.
- Reassign Notifications - Notifications can be reassigned to individual recipients or a group by clicking the Reassign Notifications icon. On selecting a row in the All Notifications table, and clicking the icon, the reassign notification popup is displayed. The Type is set to Reassigned by default, and the Severity and Description are pre-populated

from the selected row; you can then change any of these values and assign the notification to one or more recipients.

**Figure 3-15 Reassign Notification**

The screenshot shows a dialog box titled "Reassign Notification". It features two dropdown menus at the top: "Severity" is set to "Critical" and "Type" is set to "Reassigned". Below these is a text area labeled "Description" containing the text "Individual notification reassigned". At the bottom of the dialog, there is a search field for recipients with the text "benny" entered. A dropdown menu below the search field shows "Benny Anderson". To the right of the search field is an empty list box labeled "Selected". At the bottom right of the dialog are "OK" and "Cancel" buttons.

The All Notifications table displays the following columns:

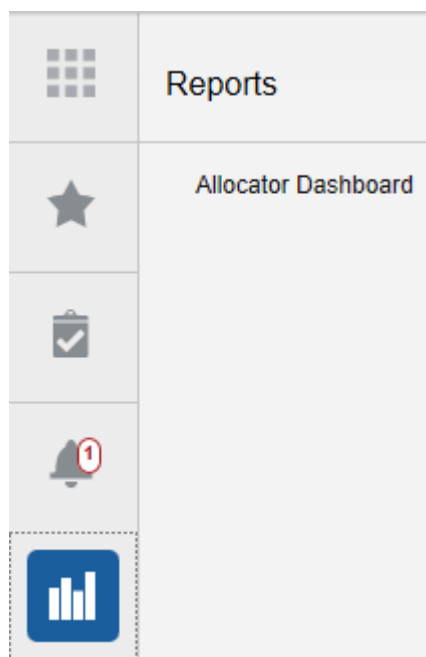
- Notification Severity - A colored label indicating the Notification Severity.
- Status - If the status is unread, an icon  is shown. Otherwise it is blank.
- Description - The description of the notification itself.
- Type - The description of the Notification Type for the notification.
- Recipients - In case of individual notifications, this column contains the user ID of the user to whom the notification is assigned. When the notification is assigned to multiple users, it displays the text 'Multiple' and enables a context popup which lists all the recipients. This field is empty when the notification is assigned to a group associated with a type.
- Creation Date - Timestamp showing the date and time of creation.
- Created By - User ID of the user who created the notification.
- Last Updated Date - Timestamp showing the date and time when the last update was made.
- Last Updated By - User ID of the user who last updated the notification.
- Application ID - Unique identifier that identifies the application. Not visible by default.

- Department - The Department associated with the notification. Not visible by default.
- Class - The Class associated with the notification. Not visible by default.
- Subclass - The Subclass associated with the notification. Not visible by default.
- Location - The Location associated with the notification. Not visible by default.
- Supplier - The Supplier associated with the notification. Not visible by default.
- Performance - The Performance value associated with the notification. Not visible by default.
- Brand - The Brand associated with the notification. Not visible by default.
- Rollup Count - The Rollup Count associated with the notification. Not visible by default.
- Additional Information - Refers to the Additional Information attribute associated with the notification. Not visible by default.

## Reports

The functionality of Reports works similar to the Tasks menu.

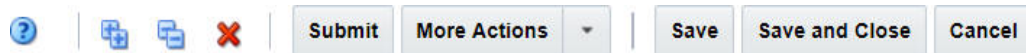
**Figure 3-16 Reports Menu**






## Screen Level



### Screen Level Action - Icons and Buttons

The screen level actions display the icons and buttons.

**Figure 3-17 Screen Level Action - Icons and Buttons****Table 3-1 Screen Level Action - Icons/Buttons and Descriptions**

Icon/Buttons	Description
Help icon 	You can access online help for a particular page by clicking the Help icon.
Expand and Collapse icon 	You can view all and collapse all the sections in the application window by clicking the Expand and Collapse icon.
Delete icon 	You can delete a deal component by selecting the Delete icon.
Status Action Button	Depending on the status of your deals, the status action button displays. For example, Submit. Wherever applicable, this button will be available to change the status of an entity. The status will be changed to the label specified on the button. If there is more than one status to which the entity can be changed, clicking the arrow on the right side of the button will display the additional status options.
More Actions	The More Actions button will have any additional actions and options for navigating to other screens.
<b>Save</b>	Click <b>Save</b> to save the created deals and stay in the Deal window.
<b>Save and Close</b>	Click <b>Save and Close</b> to save the deals and exit the Deal window.
<b>Cancel</b>	Click <b>Cancel</b> to reject the deal and exit the Deal window.

## View all the Sections Within a Window

You can view all the sections in the Deal window by clicking the Expand icon . You can shrink all the sections in the Deal window by clicking the Shrink icon .

## Table Level

### Table Menu Options

#### Note:

- Deals is used as an example which is specific to the Oracle Retail Merchandising, and may not be relevant to this application.
- [Figure 3-18](#), [Figure 3-19](#), [Figure 3-20](#) are mere representation and may be different for every window/table/popup.



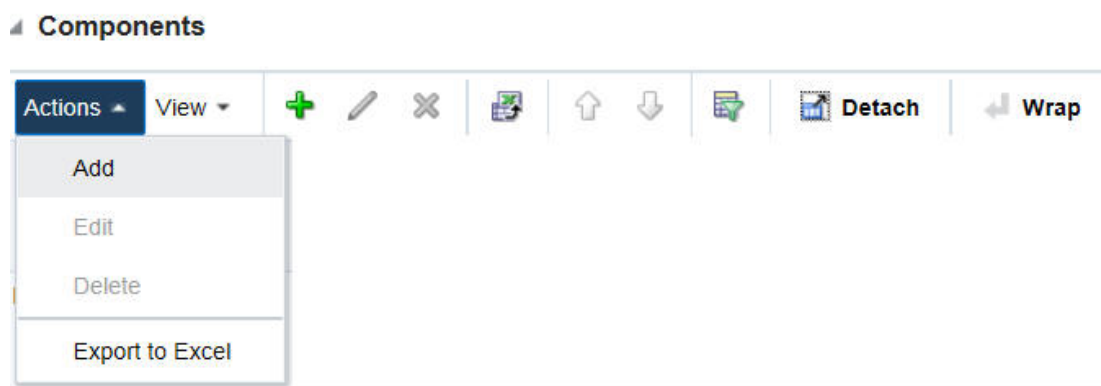
The Actions menu, View menu, and icons are displayed in the form of a table. For more information on these options, see the sections [Action Menu and Icons](#) and [View Menu](#).

## Action Menu and Icons

The Actions menu provides the option to take different actions related to entries in the table. Depending on the nature of the table, these actions can be add, view, delete or edit table rows, create by moving to a new screen or export the table contents to the spreadsheet. Alternatively these actions can also be performed by using the icon buttons on the table toolbar. For more information on the icon/buttons, see the [Screen Level Action - Icons and Buttons](#).

In some tables, it may also contain some table specific actions.

**Figure 3-18 Actions Menu and Icons of Components Section**



**Table 3-2 Actions Menu/Icons and Descriptions of Components Section**













Actions Menu/Icon	Description
Add and Add icon 	You can add a deal component by clicking <b>Add</b> from the Actions menu or by clicking the Add icon  .
Edit and Edit icon 	You can edit a deal component by clicking <b>Edit</b> from the Actions menu or by clicking the Edit icon  .
Delete and Delete icon 	You can delete a deal component, by clicking <b>Delete</b> from the Actions menu or by clicking the Delete icon  .
Export to Excel icon 	You can save the table to a Microsoft Excel spreadsheet by clicking the Export to Excel option from the Actions menu or by clicking the Export to Excel icon  .
Move Up and Down icon 	You can move up and down the components to change the order in which they will be applied while calculating the deal by clicking the Move Up and Down icons  .
Wrap icon 	You can wrap the values in the table column by using the Wrap icon  option.

Figure 3-19 Actions Menu and Icons of Managing a Deal

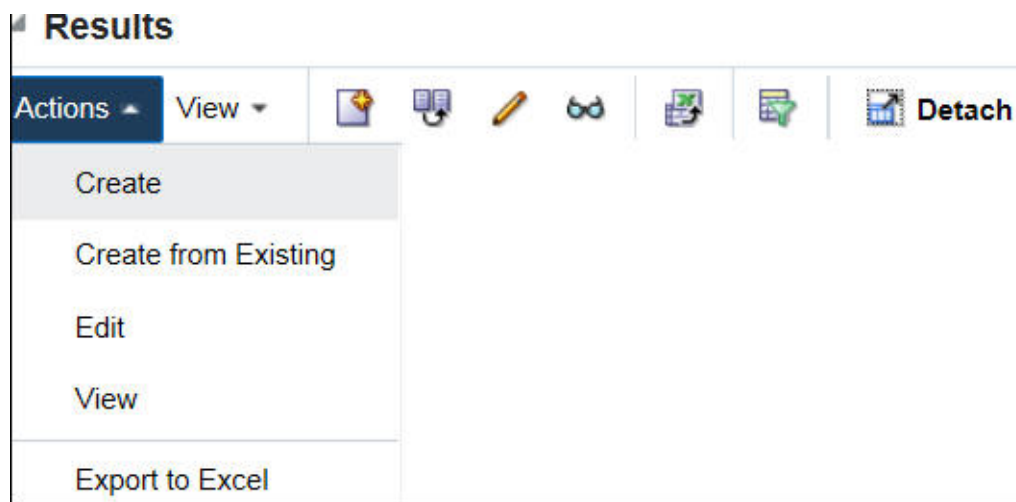














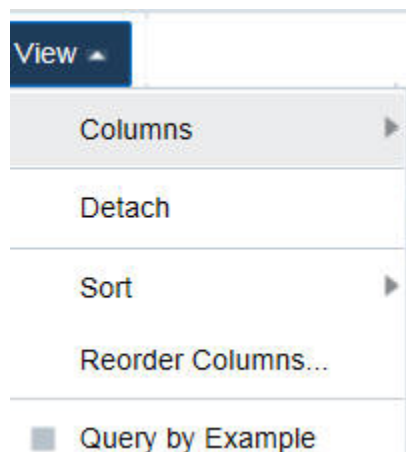
Table 3-3 Actions Menu/Icons and Descriptions of Managing a Deal



Actions Menu/Icon	Description
Create and Create icon 	You can create a deal by clicking <b>Create</b> from the Actions menu or by clicking the Create icon  .
Create from Existing icon 	You can create from an existing deal by clicking <b>Create from Existing</b> from the Actions menu or by clicking the Create from Existing icon  .
Edit and Edit icon 	You can edit a deal by clicking <b>Edit</b> from the Actions menu or by clicking the Edit icon  .
View and View icon 	You can view a deal by clicking <b>View</b> from the Actions menu or by clicking the View icon  .
Export to Excel icon 	You can save the table to a Microsoft Excel spreadsheet by clicking the Export to Excel option from the Actions menu or by clicking the Export to Excel icon  .
Wrap icon 	You can wrap the values in the table column by using the Wrap icon  option.

## View Menu

The View menu provides the options for managing the table columns and sorting and filtering the table data.

In some tables you have the option to choose a saved custom view, which is an arrangement of columns different from the default view of the table.

**Figure 3-20 View Menu of Components Section****Table 3-4 Components Section - View Menu and Descriptions**

View Menu List	Description
Columns	You can manage which of the columns will be shown in the table by clicking the <b>Show All</b> and <b>Manage Columns</b> options.
Detach	You can view the tables in the application in a separate window by clicking Detach or by clicking the Detach icon  .
Sort	You can sort columns by the following options: <ul style="list-style-type: none"> <li>• Ascending</li> <li>• Descending</li> <li>• Advanced</li> </ul>
Reorder Columns	You can reorder columns by clicking the Reorder Columns option.
Query by Example	You can filter components by one of multiple column values by clicking the Query by Example option or by clicking the query by example icon  .

## Search Screens

You can search for a particular entity by entering, selecting, or searching in the Merchandising Operations Management (MOM) application, for example to search for a deal.

To search for a deal:

1. From the Tasks menu, select **Orders > Deals > Manage Deal**. The Deal Search window appears.
2. You can search for a deal by providing search criteria in the search section. The criteria can be provided either in Basic or Advanced mode, depending on the requirement. Basic is the default mode when the search screen is entered. Click **Advanced** to access the search panel in advanced mode. You can return to Basic mode by clicking **Basic**.

## Search for a Deal Through the Basic Search Criteria

To search for a deal through the basic search criteria:

1. Enter or select one or all of the following basic search criteria.

**Table 3-5 Basic Search Criteria**

Search Field	Description
Deal	Enter the deal ID.
Deal Type	Select the deal type. The options are: Annual, Promotional, PO Specific, and Vendor Funded Markdown.
Status	Select the status of the deal. The options are: Worksheet, Submitted, Approved, Rejected, Closed.
Billing Type	Select the type of deal being created. The options are: Off invoice, Bill Back, Bill Back Rebate, Vendor Funded Promotion, Vendor Funded Markdown.
Vendor Type	Select the vendor type.
Vendor	Enter, select or search for the vendor.
Active Date	Enter the date on which the deal becomes active, or click the calendar icon and select the date.
Close Date	Enter the date on which the deal ends, or click the calendar icon and select the date.

**Figure 3-21 Search Section in Basic Search Mode**

2. You can also click on the Saved Search drop down to select one of the saved sets of search criteria. Selecting a saved search will populate the criteria section with saved criteria. If the saved search is selected to run automatically then the search will be executed too. You can also choose to manage and personalize the saved searches by clicking Personalize in the list. The Personalize Saved Searches window appears. For more information on the Personalize Saved Searches, see the section [Personalize Saved Search](#).
3. Click **Search**. The deals that match the search criteria are displayed in the Results section.

**Figure 3-22 Search Results**

The screenshot displays the Oracle Advanced Search interface. At the top, there is a search form with fields for Deal, Deal Type, Status (set to 'Worksheet'), Billing Type, Vendor Type, Vendor, Active Date, and Close Date. There are buttons for 'Advanced', 'Saved Search', 'Search', 'Reset', and 'Save..'. Below the search form, the 'Results' section shows a table with columns: Deal, Vendor, Vendor Name, Status, Billing Type, Active Date, and Close Date. The table contains 10 rows of data. At the bottom right of the results section, it says 'Total Records: 47'.

Deal	Vendor	Vendor Name	Status	Billing Type	Active Date	Close Date
20001	1	ET SUPPLIER	Worksheet	OF-Invoice	12/14/17	12/31/18
42002	1	ET SUPPLIER	Worksheet	Vendor Funded Promotion	12/1/15	12/31/15
115002	3	ET Second Supplier	Worksheet	OF-Invoice	12/01/16	12/31/16
135001	1	ET SUPPLIER	Worksheet	Bill Back	3/14/16	6/30/16
150006	1	ET SUPPLIER	Worksheet	Bill Back	12/27/15	12/27/15
150008	1	ET SUPPLIER	Worksheet	Bill Back	1/27/16	2/5/16
180003	3	ET Second Supplier	Worksheet	OF-Invoice	2/2/16	2/2/16
200004	2	Brooks Running	Worksheet	Bill Back Rebate	1/10/16	2/25/16

4. Click **Reset** to execute the saved search.
5. Click the **Save..** button to save the current set of search criteria as a Saved Search. The Create Saved Search window appears. For information on the Create Saved Search window, see the section [Create Saved Search](#).
6. Click **Done** to close the window.

## Search for a Deal Through the Advanced Search Criteria

To search for a deal through the advanced search criteria:

1. Enter or select one or all of the following advanced search criteria.

**Table 3-6 Advanced Search Criteria**

Search Field	Description
Deal	Enter the deal ID.
Deal Type	Select the deal type.
Status	Select the status of the deal.
Billing Type	Select the type of deal being created.
Vendor Type	Select the vendor type.
Vendor	Enter, select or search for the vendor.
Active Date	Enter the date on which the deal becomes active, or click the calendar icon and select the date.
Close Date	Enter the date on which the deal ends, or click the calendar icon and select the date.
External Ref. No.	Enter the external reference number.
Order No.	Enter, select or search for the order number.
Deal Component Type	Select the deal component type.
Rebate	Select <b>Yes</b> if the rebate is included in the deal or select <b>No</b> if the rebate is not included in the deal.

**Table 3-6 (Cont.) Advanced Search Criteria**

Search Field	Description
Promotion	Enter, select or search the promotion from the list.
Division	Enter the division number, select or search for the division name and number.
Group	Enter the group number, select or search for the group name and number from the list.
Department	Enter the department number, select or search for the department name and number from the list.
Class	Enter the class number, select or search for the class name and number from the list.
Subclass	Enter the subclass number, select or search for the subclass name and number from the list.
Item	Enter the item number, or search by using the search icon.
Chain	Enter the chain number, select or search for the chain name and number from the list.
Area	Enter the area number, select or search for the area name and number from the list.
Region	Enter the region number, select or search for the region name and number from the list.
District	Enter the district number, select or search for the district name and number from the list.
Location	Enter the location number, select or search for the location name and number from the list.

**Figure 3-23 Search Section in Advanced Search Mode**

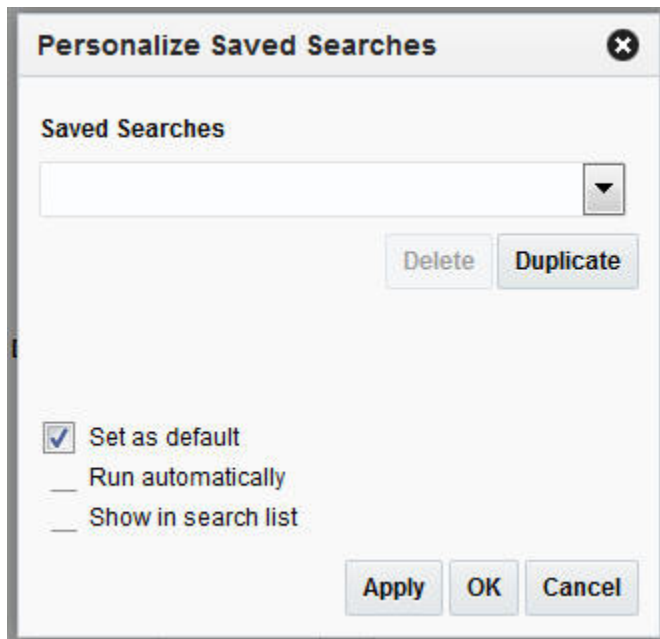
2. You can also click the **Saved Search** drop down to select one of the saved sets of search criteria. Selecting a saved search will populate the criteria section with saved criteria. If the saved search is selected to run automatically then the search will be executed too. You can also choose to manage and personalize the saved searches by clicking Personalize in the list. The Personalize Saved Searches window appears. For more information on the Personalize Saved Searches, see the section [Personalize Saved Search](#).
3. Click **Search**. The deals that match the search criteria are displayed in the Results section.

4. Click the **Save..** button to save the current set of search criteria as a Saved Search. The Create Saved Search window appears. For information on the Create Saved Search window, see the section [Create Saved Search](#).
5. Click **Done** to close the window.

## Personalize Saved Search

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

**Figure 3-24** Personalize Saved Searches Window



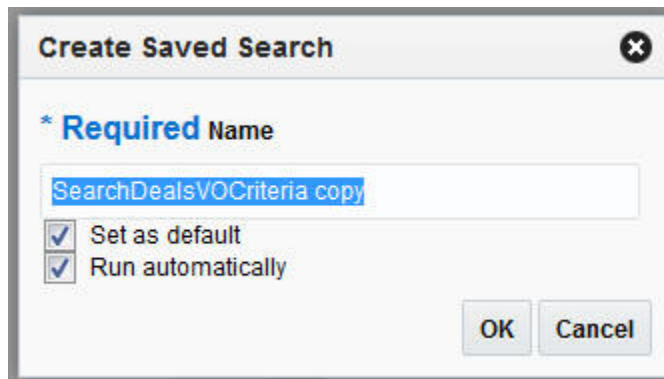
## Create Saved Search

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

To view the created saved search:

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

Figure 3-25 Create Saved Search Window



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



# 4

## Set User Preferences

The Preferences pages are where you specify the default regional, language, and accessibility settings that you want to use throughout the system.

To set your preferred preferences, click **User** list > **Preferences** at the top of the application home page. The Preferences page appears. The standard preference options available are as follows:

- Regional
- Language
- Accessibility

To return to the application home page, click **Back to Home** at the top of the page. The Preferences pages are where you specify the default regional, language, and accessibility settings that you want to use throughout the system.

### Regional Options

Use the following options to specify the default formats for territory, date, time, number, and time zone you want to use throughout the system.

**Table 4-1 Regional Options**

Value	Description
Territory	Specify the country details.
Date Format	Select the date format that you want to use.
Time Format	Select the time format that you want to use.
Number Format	Select the number format that you want to use.
Time Zone	Select the time zone you want to use.

### Language Options

Use the following options to specify the default language you want to use throughout the system.

**Table 4-2 Language Options**

Value	Description
Default	Specify the default language you want to use.
Current Session	Specify the language you want to use for the current session.

# Accessibility Options

Use the following options to specify the default accessibility preferences you want to use throughout the system.

**Table 4-3 Accessibility Options**

Value	Description
Accessibility	Select the accessibility option you want to apply.
Color Contrast	Specify the color contrast that you want to use.
Font Size	Specify the font size that you want to use.

## Accessibility

Accessibility involves making your application usable for differently abled persons such as low vision or blindness, deafness, or other physical limitations. This means creating applications that can be used without a mouse (keyboard only), used with a screen reader for blind or low-vision users, and used without reliance on sound, color, or animation and timing.

The Merchandising solutions provides the ability for users to switch between accessibility support levels in the application, so that users can choose their desired type of accessibility support, if required. They do so by exposing a user preferences screen in which the user can specify the accessibility preferences/mode which will allow the user to operate in that mode.

- **Default Mode:** By default, the Merchandising solutions have rich user interface interaction, and are also accessible through the keyboard. Note that in the default mode, screen readers cannot access all components. If a visually impaired user is using a screen reader, it is recommended to use the Screen Reader mode.
- **Screen Reader:** Merchandising solutions are optimized for use with screen readers. The Screen Reader mode facilitates the display for visually impaired users, but will degrade the display for sighted users (without visual impairment).

Additional fine grained accessibility levels as described below are also supported:

- **High-contrast:** Merchandising solutions can display high-contrast-friendly visual content. High-contrast mode is intended to make the solutions compatible with operating systems or browsers that have high-contrast features enabled. For example, they change its use of background images and background colors in high-contrast mode to prevent the loss of visual information. Note that the Merchandising solutions high-contrast mode is more beneficial if used in conjunction with your browser's or operating system's high-contrast mode. Also, some users might find it beneficial to use large-font mode along with high-contrast mode.
- **Large-fonts:** Merchandising solutions also support browser-zoom-friendly content. In default mode, most text and many containers have a fixed font size to provide a consistent and defined look. In large-font mode, text and containers have a scalable font size. This allows the solutions both to be compatible with browsers that are set to larger font sizes and to work with browser-zoom capabilities. Note that if you are not using large-font mode or browser-zoom capabilities, you should

disable large-font mode. Some users might also find it beneficial to use high-contrast mode along with the large-font mode.

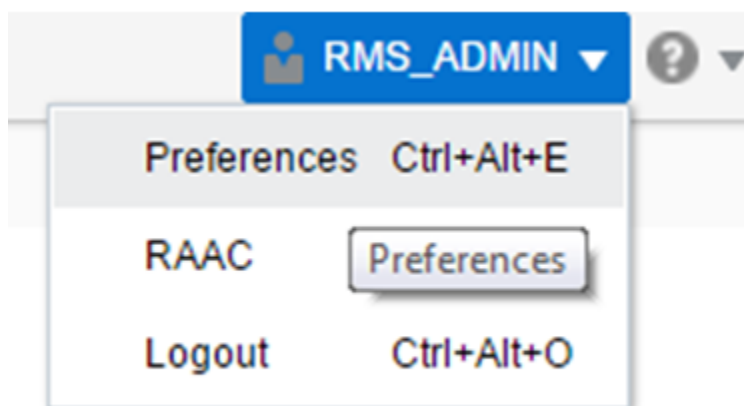
Merchandising/Sales Audit provides the ability to switch between the above accessibility support levels in the application, so that users can choose their desired type of accessibility support, if required. It exposes a user preferences screen in which the user can specify the accessibility preferences/mode which will allow the user to operate in that mode.

## Configure Application for Screen Reader Mode

Users can configure their session to the accessibility mode by setting user references on the home page of the application as shown below. Perform the following procedure to configure a user preference for screen reader mode.

1. Log into one of the Merchandising solutions. In this example, we use Merchandising.
2. From the application home page, select **Preferences** from the logged in user menu.

Figure 4-1 Logged-in User Menu

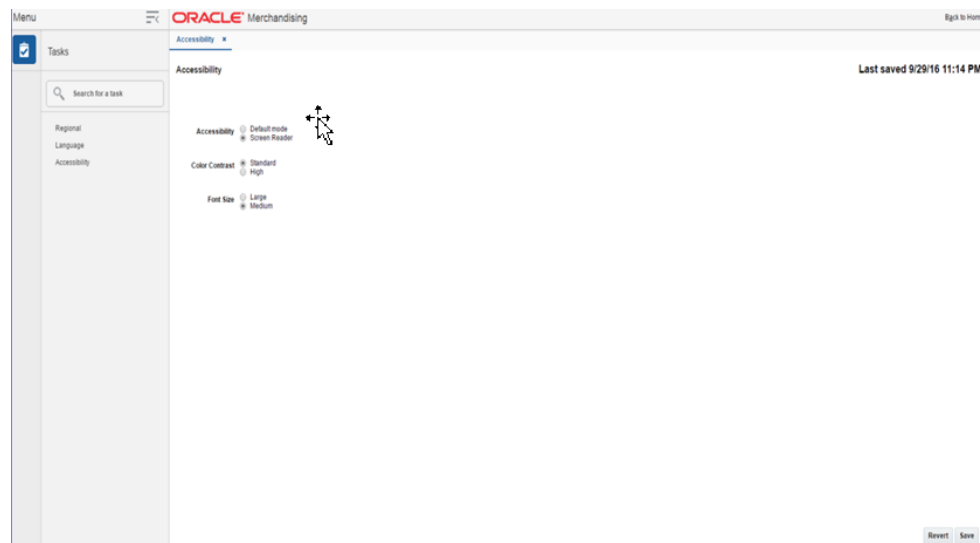


3. From the Tasks pane, click **Accessibility** to open the Accessibility tab.

Figure 4-2 Accessibility Tab



4. Select Screen Reader to enable accessibility mode, and click **Save**.

**Figure 4-3 Enabling the Screen Reader**

5. Click on Back to Home to return to the home page. Now the application is enabled in the screen reader mode to assist a visibly challenged user. Some of the graphical content of Operational Insights is also displayed in a tabular mode.

## Set Accessibility to Default

Perform the following procedure to set Accessibility mode to Default mode.

1. From the application home page, select **Preferences** from the logged in user menu.

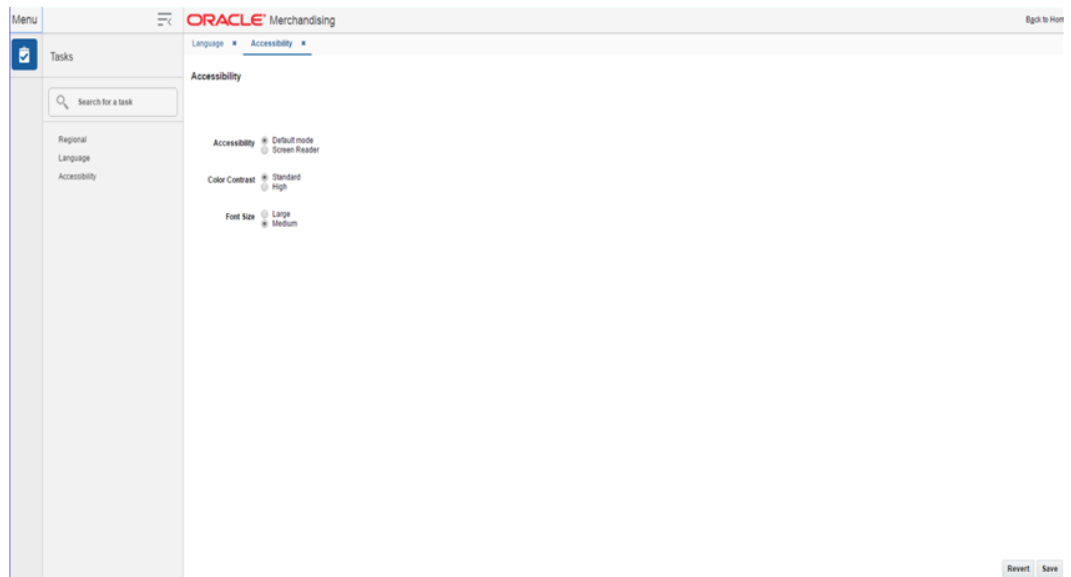
**Figure 4-4 Logged-in User Menu**

2. From the Tasks pane, click **Accessibility** to open the Accessibility tab.

**Figure 4-5 Accessibility Tab**

3. Select Default mode.

Figure 4-6 Accessibility Settings



4. Click **Save** to save the settings.
5. Click Back to Home to return to the home page. Application is returned to default mode and you can view graphical reports.