

Oracle[®] Retail Home

Application Usage Guide



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Preface

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- Exact error message received
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Oracle Retail Product documentation is available on the following website <https://docs.oracle.com/en/industries/retail/html>

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Oracle Retail Cloud Services and Business Agility

Oracle Retail Home Cloud Service is hosted in the Oracle Cloud with the security features inherent to Oracle technology and a robust data center classification, providing significant uptime. The Oracle Cloud team is responsible for installing, monitoring, patching, and upgrading retail software.

Included in the service is continuous technical support, access to software feature enhancements, hardware upgrades, and disaster recovery. The Cloud Service model helps to free customer IT resources from the need to perform these tasks, giving retailers greater business agility to respond to changing technologies and to perform more value-added tasks focused on business processes and innovation.

Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

1

Overview

Retail Applications can integrate with Retail Home in various ways, and some applications integrate with more Retail Home features than others. This chapter gives an overview of the features in which each Retail Application participates. For example, the most basic integration with Retail Home is with the Application Navigator, where the URL for a cloud service is configured in the Retail Home UI. For those applications which integrate with Retail Home in ways beyond the Application Navigator, those integrations are described in application-specific chapters throughout the remainder of this document.



Note:

The following Oracle Retail applications currently only support launching from Retail Home:

- Oracle Retail Inventory Optimization
- Oracle Retail Xstore Office Cloud Service
- Oracle Retail Order Broker Cloud Service 19.x and 21.x
- Oracle Retail Order Orchestration 23.x
- Oracle Retail Order Management System Cloud Service 19.x and 21.x
- Oracle Retail Order Administration Cloud Service 23.x

Roles

In Oracle Retail cloud services, roles are used to determine which applications, data, and actions to which the user has access. Retail Home provides users with a screen to request access to new roles, as well as request that roles be removed from their access. See the *Oracle Retail Home User Guide* for more information.

Application Navigator Setup

The application navigator setup provides basic Retail Home functionality such as adding a link to the application menu for each application and enabling the import of seed data. Seed data is configuration data for Retail Home's applications and dashboards. It can contain definitions of applications, dashboards, tiles, tile states, reports, and filters. The application navigator also establishes the Retail Home integrations that the cloud service supports, such as favorites, notifications, resource bundle customizations, and seed data. If the application supports seed data, it is imported by accessing the Application Navigator Setup, selecting an application row in the table, and clicking Refresh Seed Data. The table below describes which applications can be added to the Application Navigator Setup screen, the appropriate application code to use, and if the application includes seed data.

For detailed steps on configuring the Application Navigator Setup screen, refer to the *Oracle Retail Home Administration Guide*.

Oracle Retail Application	Application Code (case-sensitive)	Includes Seed Data	Seed Data Usage
AI Foundation Cloud Services	RSP	No	
<ul style="list-style-type: none"> • AI Foundation Cloud Service • Assortment and Space Optimization Cloud Service • Offer Optimization Cloud Service • Promotion and Markdown Cloud Service • Inventory Optimization Cloud Service 	SO PRO PMO IO		
Retail Insights Cloud Service	RI	Yes	RI seed data includes sample dashboards and tiles for four different user roles. The application name in the app navigator entry should be Retail Insights to import this data.
Process Orchestration & Monitoring (POM)	Oam	Yes	POM seed data includes sample dashboards and tile configurations for all different POM roles. The application name in the app navigator entry should be “Process Orchestration and Monitoring” to import this data.
Merchandising Foundation Cloud Service (Merchandising) 19.x and 23.x	Rms	Yes	Merchandising seeds a sample dashboard and tile for the Inventory Analyst role. The application name in the app navigator entry should be Merchandising to import this data.
Merchandising Foundation Cloud Service (Sales Audit) 19.x and 23.x	ReSA	Yes	
Allocation Cloud Service 19.x and 23.x	ALC	Yes	
Pricing Cloud Service 19.x and 23.x	Rpm	Yes	
Supplier Evaluation Cloud Service 23.x	ORSE	No	

Oracle Retail Application	Application Code (case-sensitive)	Includes Seed Data	Seed Data Usage
Brand Compliance Management Cloud Service 23.x	ORBC	No	
Store Inventory Operations Cloud Service 19.x and 23.x	SIOCS	Yes	SIOCS seed data includes dashboard and tiles for one user role.
Xstore Office Cloud Service 21.1	XOCS	No	Retailers already provisioned with XOCS v21.x will need to do this manually following the steps in the <i>Oracle Retail Home Administration Guide</i> . The link to XOCS is enabled in RH.
Customer Engagement Cloud Service 19.x and 20.x+	ORCE	No	ORCE uses a separate mechanism for seeding Retail Home. Please consult the Customer Engagement chapter for more information.
Order Broker Cloud Service 19.x and 21.x		No	
Order Orchestration Cloud Service 23.x	OOCs	No	
Assortment and Item Planning 19.x and Assortment Planning 23.x	APEECS	No	Assortment and Item Planning 19.x and Assortment Planning 23.x use a separate mechanism for seeding Retail Home. Please consult the Assortment and Item Planning chapter for more information.
Merchandise Financial Planning 19.x and 23.x	MFP	No	MFP uses a separate mechanism for seeding Retail Home. Consult the Merchandise Financial Planning chapter for more information.
Retail Demand Forecasting 19.x and 23.x	RDF	No	RDF uses a separate mechanism for seeding Retail Home. Consult the RDF chapter for more information.
Retail Data Store		No	

Notifications, Favorites, and Resource Bundles

In Retail Home, the notifications, for each cloud service configured with it, are displayed to the user. For users of multiple Oracle Retail services, this will allow them to see their notifications without logging into each solution individually. Similarly, some applications allow tasks to be saved as Favorites, and these favorites can be shared with Retail Home, to be included as main menu options.

Resource bundle customization is a feature that allows a user to modify strings displayed in the user interfaces, both for the primary and secondary languages that the application supports. Only some applications support these features, as described in the table below.

For more information on the Retail Home features, refer to the *Oracle Retail Home Administration Guide*.



Note:

The default language resource bundle for Oracle Retail Cloud Services is listed as AMERICAN (en), for American English.

Oracle Retail Application	Supports Favorites	Supports Notifications	Supports Resource Bundles
AI Foundation Cloud Services <ul style="list-style-type: none"> • AI Foundation Cloud Service • Assortment and Space Optimization Cloud Service • Offer Optimization Cloud Service • Promotion and Markdown Cloud Service • Inventory Optimization Cloud Service 	Yes	Yes	Yes
Retail Insights Cloud Service	No	No	Yes
Process Orchestration & Monitoring (POM)	Yes	Yes	Yes
Merchandising Foundation Cloud Service (Merchandising) 19.x and 23.x	Yes	Yes	Yes
Merchandising Foundation Cloud Service (Sales Audit) 19.x and 23.x	Yes	Yes	Yes
Allocation Cloud Service 19.x and 23.x	Yes	Yes	Yes
Invoice Matching Cloud Service 19.x and 23.x	Yes	Yes	Yes
Pricing Cloud Service 19.x and 23.x	Yes	Yes	Yes
Supplier Evaluation Cloud Service 23.x	No	No	No

Oracle Retail Application	Supports Favorites	Supports Notifications	Supports Resource Bundles
Brand Compliance Management Cloud Service 23.x	No	No	No
Store Inventory Operations Cloud Service 19.x and 23.x	Yes	No ¹	No ¹
Xstore Office Cloud Service 21.1	No	No ¹	No ¹
Customer Engagement Cloud Service 19.x and 20.x+	Version 20.x+ only	Version 20.x+ only	No
Order Broker Cloud Service 19.x and 21.x	No	No	No
Order Orchestration Cloud Service 23.x	No	No	No
Assortment and Item Planning 19.x and Assortment Planning 23.x	No	Yes	Supported in 23.x, but not in 19.x.
Merchandise Financial Planning 19.x and 23.x	No	Yes	Supported in 23.x, but not in 19.x.
Retail Demand Forecasting 19.x and 23.x	No	Yes	Supported in 23.x, but not in 19.x.
Retail Data Store	No	No	No

¹ SIOCS and XOCS support notifications and resource bundles, but not through Retail Home. See the administration guides for these cloud services for more details.

Subscription Metrics Dashboard

Oracle Retail cloud services each have a metric associated with them that is the basis for how customers pay for the services. The metric used for each cloud service is a bit different, but in all cases it is expected that customers (as well as Oracle Retail) will monitor their usage so as not to exceed their contract limitations. To help support this monitoring, a dashboard that can display the metrics exists in Retail Home for each of your cloud services.

Oracle Retail cloud services can be configured to capture and make available the subscription metrics to the Retail Home Application Dashboard, which allows administrators for retailers to view their usage against their subscription levels and set alerts for when they may be reaching the maximum levels allowed in their current subscription.

Oracle Retail Application	Supports Subscription Metrics	Usage Notes
AI Foundation Cloud Services	Yes	
<ul style="list-style-type: none"> • AI Foundation Cloud Service • Assortment and Space Optimization Cloud Service • Offer Optimization Cloud Service • Promotion and Markdown Cloud Service • Inventory Optimization Cloud Service 		
Retail Insights Cloud Service	Yes	N/A
Process Orchestration & Monitoring (POM)	Partial	Since POM is not on the price listing, it does not display subscription metrics. But the report can still be used to display the currently installed version of POM and a list of previously installed versions.
Merchandising Foundation Cloud Service 19.x and 23.x	Yes	The Merchandising Foundation report also applies for the other Merchandising cloud services (Pricing, Invoice Matching, and Allocation)
Supplier Evaluation Cloud Service 23.x	Yes	
Brand Compliance Management Cloud Service 23.x	Yes	
Store Inventory Operations Cloud Service 19.x and 23.x	Yes	SIOCS has a scheduled batch that runs once every month to update metric usage information.
Xstore Office Cloud Service 21.1	No	XOCS currently does not publish any Subscription Metrics to Retail Home.
Customer Engagement Cloud Service 19.x and 20.x+	Yes	
Order Broker Cloud Service 19.x and 21.x	No	
Order Orchestration Cloud Service 23.x	No	
Assortment and Item Planning 19.x and Assortment Planning 23.x	No	N/A

Oracle Retail Application	Supports Subscription Metrics	Usage Notes
Merchandise Financial Planning 19.x and 23.x	No	N/A
Retail Demand Forecasting 19.x and 23.x	No	N/A
Retail Data Store	Yes	RDS updates OCPU and Storage usage statistics weekly.

Retail Cloud Extensions

Retail Cloud Extensions, delivered by the Oracle Retail Customer Value Creation team, leverage the power and scalability of the Oracle Retail platform to rapidly innovate. These extensions do not have a seeding process to add them to Retail Home automatically. However, tiles can be configured for the extensions following the instructions in the Report Configuration section of the Retail Home Administration Guide.

Visit the Retail Suite Information Center Index, Documentation, and Customer Resources (Doc ID [1331603.2](#)) to view Oracle Retail Cloud Extension documentation.

Retail Reference Model

The Oracle Retail Reference Model (RRM) is a collection of detailed implementation information for our partners and customers available via Oracle Retail Home. It includes business process models, technical models, and a glossary. Retail Home provides access to the latest hosted version of the RRM, which is automatically updated with the latest releases and hotfixes to the RRM as they become available.

Customers preferring a local download can visit My Oracle Support and search for Doc ID [2058843.2](#) to access the RRM Information Center and Release Index and download the required version.

2

Retail AI Foundation Cloud Services

This section will outline how the AI Foundation Cloud Services, including AI Foundation Cloud Service, Assortment and Space Optimization Cloud Service, Offer Optimization Cloud Service, Promotion and Markdown Cloud Service, and Inventory Optimization Cloud Service, support Retail Home features. It will also cover Retail Insights usage of dashboards and tiles in Retail Home.

Application Navigator Links

All AI Foundation cloud services support configuring a tile to allow users to launch the individual solutions from Retail Home. This will allow your users to have a single place to access all their AI Foundations cloud service links, as well as any other links configured. To do this, an entry must be configured in the Application Navigator section of Retail Home. Please refer to *Oracle Retail Home Administration Guide* for more information.

Notifications

All AI Foundation cloud services (except Retail Insights) support displaying user notifications in Retail Home. This will allow your users to view their AI Foundation notifications across all solutions without having to log into each cloud service individually, allowing them to better prioritize their work. Notifications are configured for the AI Foundation solutions based on configuring the Application Navigator links.

Favorites

All AI Foundation cloud services (except Retail Insights) support displaying user favorites in Retail Home. This will allow your users to launch into their most used workflows in the AI Foundation solutions directly from Retail Home to act directly on insights visible in Retail Home or based on their planned activities for the day. Favorites are configured for the AI Foundation solutions based on configuring the Application Navigator links.

Subscription Metric Report

In addition to the business metrics described above, the AI Foundation Cloud Services can be configured to provide subscription usage metrics on Retail Home to the administrator. This report provides visibility to how many active item/locations exist by month, which is the metric used for all AI Foundation cloud services.

This report is visible by navigating to Settings -> Application Administration -> Application Dashboard. Additional details for using the subscription metrics report, such as inputting or editing the subscription start/end dates and the subscription quantity, can be found in the *Retail Home Administration Guide*.

Resource Bundle Customization

Resource bundles are used in the standard manner outlined in the *Oracle Retail Home Administration Guide* across all AI Foundation cloud services; however, this is not the only method used by AI Foundation cloud services. AI Foundation cloud services, especially many of the labels used for Merchandising Foundation, also use other methods to support customer configuration of labels. For more details on the other configuration methods see the implementation guides for these cloud services, such as the Codes and Descriptions section of the *Oracle Retail Merchandising Foundation Implementation Guide*.

Customer Module Management

Customer Module Management is used for the AI Foundation cloud services for controlling the enablement of certain batch configurations. For more on controlling batch modules in Retail Home, see the Process Orchestration and Management section of this document. The *Retail Analytics & Planning Implementation Guide* provides more detail on how to use the AI Foundation modules as part of a project.

Managing access to modules of the user interfaces for the AI Foundation cloud services is controlled in the cloud services themselves, usually based on system options configurations or security privileges. For more on configuring AI Foundation cloud service modules using these methods see the implementation guides and security guides for each of the services.

Retail Insights Cloud Service

Dashboards and Tiles

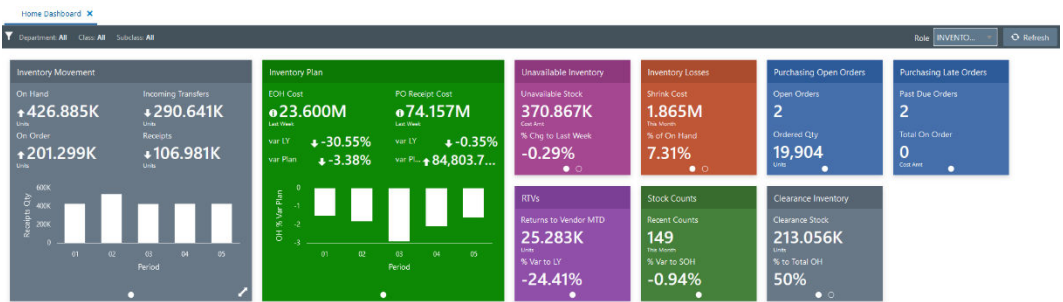
If you purchased Oracle Retail Insights as part of your Oracle Retail subscription, then Retail Home can be populated with thousands of pre-integrated metrics through that platform. Retail Insights (RI) provides a set of pre-built sample tiles and dashboard layouts for Retail Home to get a new user started with RI/Retail Home integration. The sample tiles include tile states, filters, layouts, and embedded Data Visualization (DV) content for a variety of common reporting areas such as sales, inventory, and purchase orders. To import this content into your Retail Home environment, go to the Application Navigator Setup, select the RI application row in the table, and click Refresh Seed Data. The application name in the table must be Retail Insights as the seed data is linked to that name only. The sample dashboards created by the seed data import are intended for use by the roles described below.

Dashboard Role	Summary
INVENTORY_ANALYST_JOB	Dashboard for a user group that primarily cares about inventory levels and movement of stock.
IT_BUSINESS_ANALYST_JOB	Dashboard for a user group that wants a broad overview of the current state of their business so they can drill in to focus on different areas needing analysis.

Dashboard Role	Summary
LOYALTY_MANAGER_JOB	Dashboard for a user group focused on customer activity, such as loyalty programs and promotions.
PRICING_ANALYST_JOB	Dashboard for a user group that cares mainly about the retail value of goods sold relative to costs across the different price points such as promotions and clearances.

Inventory Analyst Dashboard

This dashboard highlights some of the key reporting areas that may be of interest to an inventory analyst user group from Retail Insights in the areas of inventory on-hand and on-order, inventory comparisons to plan, returns to vendor, recent stock count adjustments, and unavailable inventory levels. The Inventory Movement tile expands to a Data Visualization (DV) project which provides a deeper analysis of inventory levels and movement.



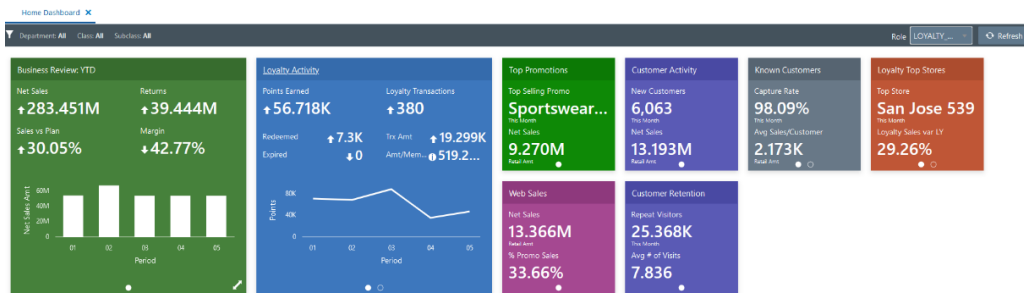
IT Business Analyst Dashboard

This dashboard provides an overview of many different reporting areas in Retail Insights, intending to give a business analyst a quick snapshot of the current state of the business. Using the many different tiles on sales, inventory, POs, and other areas, the analysis can click through to additional reports to dig into problem areas as needed. The Business Review tile expands to a DV project that reports on sales performance across the business, while the Store Recap tile expands to a more store-centric view of sales.



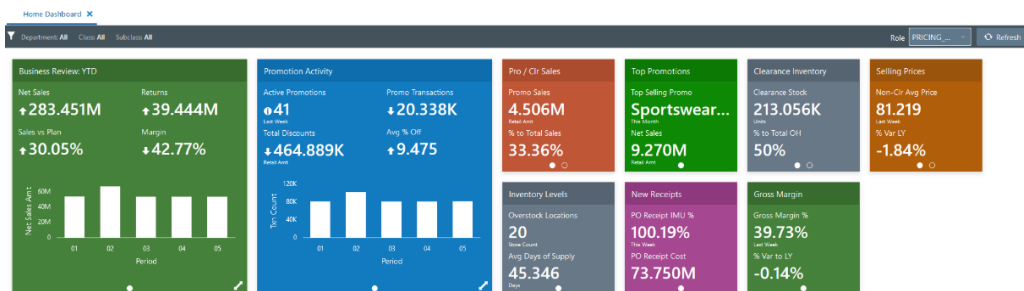
Loyalty Manager Dashboard

This dashboard provides a customer-centric view of data in Retail Insights for a user group that is interested in customer activity like loyalty point usage and promotion redemption. KPIs like New Customer counts and Capture Rate may be an important part of the retailer's strategy when it comes to attracting and retaining customers. Like the other dashboards, this view also includes the sales performance tile so that all user groups have a common frame of reference for how the business is performing.



Pricing Analyst Dashboard

This dashboard includes metrics on the retail price of goods across different price points, which is important for pricing analysts to understand as they plan for future pricing strategies and set price points for promotional and clearance activities. Analysts may want to see promotional pricing KPIs such as the average discount percent customers are getting, or the ratio of promotional sales to total sales when determining future promotion pricing. They can see how much clearance inventory they currently have on hand, which is useful for deciding when to apply deeper markdowns to clear out more stock.



Retail Home Templates

RI includes several catalog objects intended to support integration with Retail Home. These objects can be located in the **Shared Folders > Retail Home** folder in the catalog.

The sample objects include:

- Dashboard Tiles – these analyses are provided to demonstrate the various BI formats used in Retail Home, and they also feed into the sample dashboard layouts.
- Filters – these pre-defined filter objects can be added to RI analyses that are going to be linked to Retail Home tiles. Setting up filters for RH tiles requires that the RI

analysis have an associated filter on it, otherwise the analysis will not refresh when filter values are changed.

- LOVs – these pre-defined filter data sources are provided to enable Retail Home filtering on many different dimensions in RI. You must specify a data source in Retail Home filters for it to populate the list-of-values. The LOV in Retail Home and the filter on the RI analysis must have matching values.
- Projects – these DV projects are used in the sample Retail Home dashboards, but you are free to copy and repurpose them for your own dashboards and reporting, both in Retail Home and elsewhere.

For more information on creating RI analyses for Retail Home, refer to the Custom Tile State Reports Configuration chapter of the Oracle Retail Home Administration Guide.

Customizations

Retail Home provides direct integration with Retail Insights in the form of role-based dashboards and KPI tiles, allowing retailers in the Oracle Cloud to surface customized insights and analytics directly to their business users without logging in to RI itself. This allows the entire business to benefit from RI's rich data model and advanced analytic capabilities without the overhead of learning the product or navigating through multiple cloud solutions. This section will explain the integration architecture and provide a step-by-step walkthrough to connect Retail Home and RI.



The Retail Home integration is largely service-oriented, leveraging report templates to determine which API calls it should make to retrieve data. When selecting a BI report template in Retail Home, the system uses an authenticated connection to a BI report service API which can call RI reports and send the results to external consumers. Any data in RI can be used as long as the analysis conforms to the Retail Home template's specifications.

The following templates in Retail Home are configured to query reports in RI:

- BI Two Metric Template (1x1 Tile Size)
- BI Twelve Metric Template (1x1 Tile Size)
- BI Four Metric with Chart Template (2x2 Tile Size)
- BI Six Metric with Chart Template (2x2 Tile Size)
- BI Image Table Template (2x2 Tile Size)
- BI Image Metrics Table Template (2x2 Tile Size)
- Data Visualizer Template (Expanded View Only)

The BI templates will use Oracle Analytics analyses (also known as Oracle Analytics Classic reports). The Data Visualizer template uses a Project file created from DV and saved in a shared location in the RI catalog. The Chart templates require two additional analyses: a

chart configuration analysis and a chart data analysis. Examples of all analysis types are provided in this document.

Retail Insights Report Configuration

The first step in using the RH/RI integration is creating the source analysis that will provide the data for the dashboard tile. To begin, create a new analysis using a Retail Insights subject area. Add fields to the analysis matching the screenshot below. A sample analysis is also included in the Retail Insights catalog.

Metric 1				Metric 2			
Name	Value	Format	Label	Name	Value	Format	Label

Each field follows specific rules as follows:

- Name – Must provide a character-based primary label for the metric. Should not be more than 15-20 characters, as any longer will get cut off on the resulting tile.
- Value – Returns the data you wish to show in the tile. Can be a number or text.
- Format – Must be a code using one of ('N', 'S', 'PC') for number, short-number, and percent. If you are providing a text value instead of a number, set the field to a null value using two single quotes ("").
- Label – Provide an optional label which is placed under the metric value. If not used, set the field to a null value using single quotes.

When you run the analysis, it must return only a single row of data with all fields populated with a value or hard-coded to null as explained above. An example result set is shown below.

Title							
2-Metric Template							
Table							
Name	Value	Format	Label	Name	Value	Format	Label
Metric 1	1	N	Label 1	Metric 2	2	S	Label 2

When you are finished editing the analysis, save it to a shared location in the Retail Insights catalog. This means placing it under a /Shared Folders/Custom/sub-directory. In this example, the analysis is saved in the Catalog in the following location: /Shared Folders/Custom/Retail Home/Retail Home Tiles/2-Metric Template

Retail Home Dashboard Setup

To configure Retail Home to use the analysis created in the prior step, use the following instructions.

1. Login to Retail Home as an administrator (having the role RETAIL_HOME_ADMIN) and open the Settings > Dashboards and Reports > Dashboards > Custom Reports tab.
2. Create a new report using the Add button.
3. Select the BI Two Metric Template. Enter a unique name to uniquely identify the report.

4. The BI analysis path uses a slightly different format from the catalog in RI. Anything in Shared Folders will use the file path /shared/, for example: /shared/Custom/Retail Home/Retail Home Tiles/2-Metric Template
5. Lastly, select the checkbox to ensure the tile refreshes if any filters are changed (leaving it unchecked means the tile will not re-execute for filter changes).

When you are finished, the configuration should appear like below. Click OK to save the report configuration.

The next part of the configuration must be done from the Settings > Dashboards and Reports > Dashboards > Dashboard Configuration tab.

1. From the first step in the process flow on this tab, create a new dashboard tile to display your report on.
2. The tile name is shown in the header bar of the tile.
3. The application should be selected as Retail Insights.
4. The URL can be left as the default one for the application, or you can replace it with a custom link.
5. Lastly, choose a color for the tile.

When you are finished, the configuration should appear like below. Click OK to save the tile configuration.

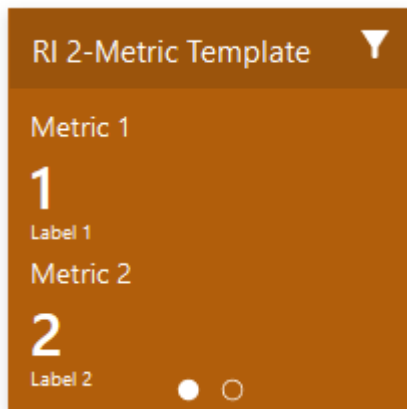
Now click through the process flow until you reach the Layouts screen. If you do not have any Layouts created, add one for a role of your choice (creating a layout for RETAIL_HOME_ADMIN is typical for testing configurations before publishing them to users). Once the layout is created, locate the new tile in the panels on the right and click the plus sign next to it to move it to the right-most list. Keep the tile size as 1x1.

RI 2-Metric Template 1 x 1 ▼ ✕

Advance to the Tile States screen. Select your dashboard and tile from the dropdown menus. From the main table on the left side, use the Add action to add your report as a tile state in this tile. Ensure the Displayed checkbox is enabled.

Click OK to save the changes. Return to the Home Dashboard tab. Select your dashboard from the dropdown menu and click Refresh to reload the tiles. If you had to

create the layout, then you may need to close the tab completely and re-open it first. Your new tile should appear in the dashboard and pull the data from Retail Insights.



Creating Four/Six Metric Tiles

The general process for creating the other tile types is the same as the two-metric tile. The main differences are:

- The larger tiles have a 5th field for each metric in the analysis, which supports status symbols such as up or down arrows. These fields must use the word associated with the symbol (up, down, critical, etc.) and can be hard-coded or dynamically chosen using CASE statements in the RI formula. The complete list of available status codes is provided in the Retail Home Administration Guide: https://docs.oracle.com/cd/F16882_01/rh/pdf/210/html/admin_guide/rpt_data_reqs.htm#BABBDFDI
- The charts in the 2x2 tiles require a configuration analysis and a data analysis. The configuration analysis is a fixed set of input fields that control chart formatting and labels. The data analysis is a two-column dataset of key/value pairs. All of the fields are detected by Retail Home based on their position in the analysis from left to right. For details on what each field is, refer to the Retail Home Administration Guide section on BI layouts: https://docs.oracle.com/cd/F16882_01/rh/pdf/210/html/admin_guide/rpt_data_reqs.htm#BABBEHBH

Samples of other BI analysis types are provided in Retail Insights in the Catalog path:

```
/Shared Folders/Retail Home/Dashboard Tiles
```

Adding Filters to Tiles

Filters in Retail Home are a way for the user to control the results returned on a tile. Filters can both be sourced from RI data and be passed back into a BI tile to filter the results. Filters are persisted locally for each user across sessions, meaning that a tile will always display the same results on first logging in, based on the user's prior selections.

Sourcing Filters from RI

Just like a tile, the filters use BI analysis to get their data. The analysis in RI must have exactly two columns for the filter ID and Value pairs. The IDs are used in API calls to filter data. The Values are displayed in user interfaces. An example using Department data is shown below.

Title	
Department	
Table	
Department Number	Department
3	Women's Activewear
1,108	Yogurt
1,140	Snack Foods
2,001	Frozen food

After saving this analysis in a shared location, you can add it as a data source in the Dashboard Filters screen in Retail Home. The filter must be created inside the Retail Insights application so that it is available for all tiles which are also linked with Retail Insights. An example filter using the Department data is shown below.

Edit Filter for Retail Insights

Active

* Display Name

* Parameter

* Type

Selection Options From Datasource Enter Manually

Datasource File Service Endpoint BI

BI Analysis

The parameter must be a single string of letters or underscores with no spaces or other special characters. This parameter will be passed on to the URL of the BI Report Service API calls, so any special characters could cause an incorrect URL which will prevent report results from returning

Using Filters in RI

For the filter in Retail Home to be applied inside an RI analysis, you must create an RI filter that looks for the parameter you've created. This filter must use a precise format, or it will not return the expected results. The filter must be created using the convert-to-SQL option when adding a new filter. An example using the sample department filter configuration is shown below.

```
"Item As-Is"."Department Number" LIKE '@{RH_DEPT}{%}'
```


Both filter data sources and filter objects for analyses are provided in the Retail Insights catalog at the paths below. These can be used in your Retail Home dashboards as-is or you may make copies of them to create your own.

/Shared Folders/Retail Home/LOVs (for sourcing filter data)

/Shared Folders/Retail Home/Filters (for adding filters to tile analyses)

Adding Filters to Tiles

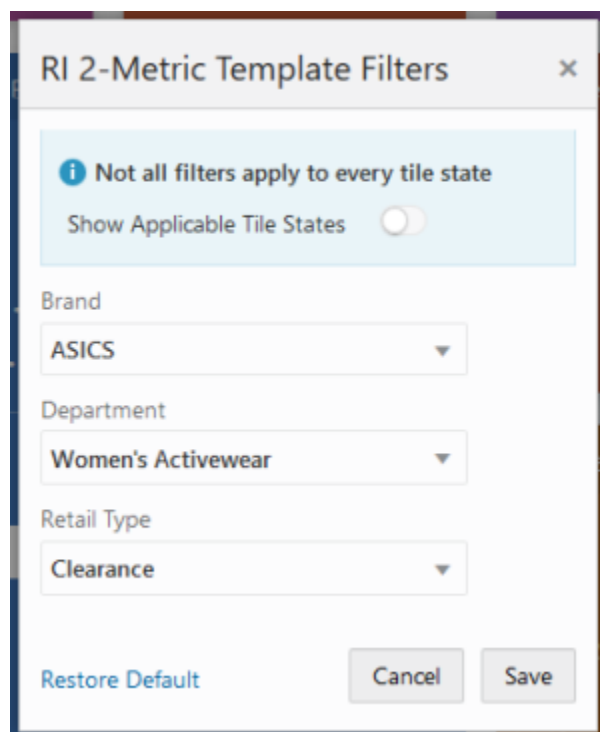
Once you have completed both of the previous sections, you may add the filters to one or more tiles in the Tile States configuration screen. For a filter to be applied, the Application Name must match between the tile and filter objects. Matching filters are displayed in a table in the bottom right corner of the Tile States screen. Simply enable any of the filters you want to use with your tile.

An example filter configuration for a Retail Insights tile is shown below.

Filters for BI Two Metric Template (Custom)

Active	Required	Filter Name	Filter Type
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Brand	Select One
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Department	Select One
<input type="checkbox"/>	<input type="checkbox"/>	Class	Select One
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Retail Type	Select One

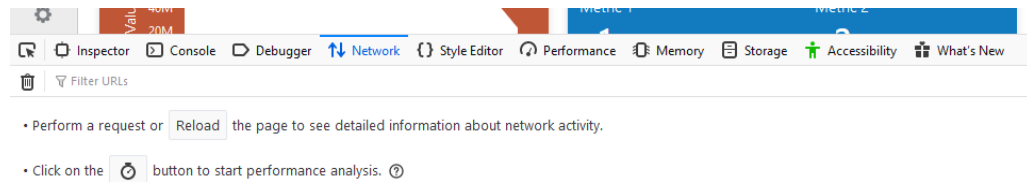
Once the filters are enabled, return to the Retail Home Dashboard tab and refresh the dashboard containing your tiles. Clicking the filter icon on the tile will now bring up a filter screen where you can select from your specified criteria.



Debugging Tile Results

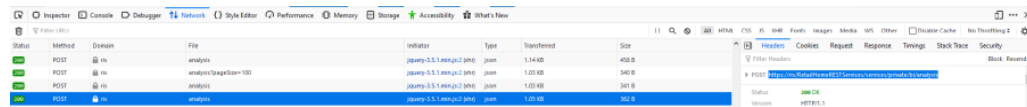
When creating new tiles based on RI data, you may get unexpected results such as formatting errors or missing/null values that require adjustments in the source analysis. To identify if the analysis is the root cause of the issues, you may use your browser's development tools to view the results of the BI Report Service API calls.

Using Firefox, you can access the tools by hitting F12 on the keyboard. Make sure you are on the Network tab as shown below.

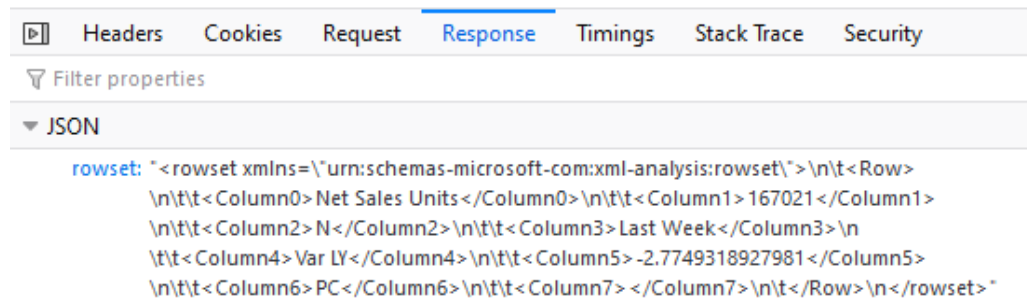


Now refresh the Dashboard using the Refresh button and wait for the network traffic to load. You will see a call to an API like the following:

`https://ris/RetailHomeRESTServices/services/private/bi/analysis`



Click on the Response tab of this API call. You should see the JSON response data containing the BI analysis results. The fields are numbered starting from 0, which is the order of the columns in the source analysis from left to right. Use these results to fine-tune your RI analyses until they are returning the expected results to Retail Home.



If the API call has resulted in an HTTP error code (404, 500, etc.) then the service is not available, and you should contact Oracle Support for assistance. If the API call was successful but no data was returned, then your BI analysis may not have been saved to a shared location or it may have been configured incorrectly in the Custom Report configuration in Retail Home.

Administration Tools

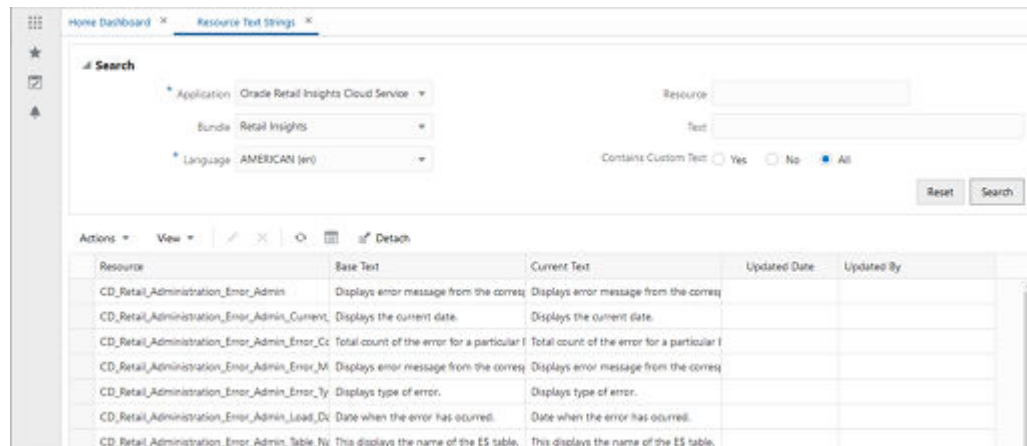
Resource Bundle Customization

Retail Insights supports the use of the following Retail Home tasks:

- Resource Text Strings
- Import Management

Resource Text Strings

The Resource Text Strings screen provides the capability to customize the resources present in the resource bundles in Retail Insights. These text strings are used as the labels and descriptions for all metrics and attributes in the base catalog.



During or after your implementation of Retail Insights, you may decide that some attributes or metrics need to be re-labeled to have more meaningful values for your users. From this screen, you can edit the default labels and they are persisted to RI as part of the nightly batch process. Resources starting with CN_ are for object names displayed in the folders in an analysis or DV project when using the Retail Insights subject areas. Resources starting with CD_ are the descriptions of those objects, which can only be seen by hovering the mouse cursor over the attribute or metric.

Users may leverage these actions in the Resource Text Strings screen for RI data:

- Edit
- Search
- Export to Excel

You should not add or delete rows as such changes will not be picked up by RI.

Import Management

Retail Insights also supports exporting the text strings displayed in the Resource Text Strings screen, modifying them from Excel, and then importing them in the Import Management screen. You should always start with an export of the data from Retail Home. Creating an Excel file with the same layout will result in errors when importing. When you import the text strings, the new values should appear in the Current Text field in Resource Text Strings.

For more details on the resource bundle and import management screens, refer to the *Oracle Retail Home Administration Guide*.

3

Process Orchestration and Monitoring

Dashboards and Tiles

When Oracle Retail Process Orchestration and Monitoring (POM) is provisioned as part of your Oracle Retail subscription, then Retail Home can be populated with tiles and a banner with details on Batch Schedules, Batch Progress, Favorites, Notifications, and so on. To import this content into your Retail Home environment, you must go to the Application Navigator Setup, select the application row in the table, and click Refresh Seed Data. The application name in the table must be Process Orchestration and Monitoring as the seed data is linked to that name only. The sample dashboards created by the seed data import are described below.

Batch Metrics

This dashboard tile provides a runtime view of the batch schedules and their progress for the selected business day. The metrics are populated for a business date where at least one schedule is active. If none are found, it will be populated for the most recent business date where at least one schedule was active.

To configure Retail Home Dashboard to display the Batch Metrics tile.

1. Login to Retail Home as an administrator (having the role RETAIL_HOME_ADMIN) and open the Settings > Dashboards and Reports > Dashboards > Dashboard Configuration tab.
2. From the first step in the process flow on this tab, create a new dashboard tile to display your report.
3. The tile name is shown in the header bar of the tile.
4. The application should be selected as Process Orchestration and Monitoring.
5. The URL can be left as the default one for the application, or you can replace it with a custom link.
6. Lastly, choose a color for the tile.

When you are finished, the configuration should appear like the example below. Click OK to save the tile configuration.

Create Dashboard Tile

Tile Name: POM Schedules
Enter 200 or fewer characters.

Application: Process Orchestration and Monitoring

URL: https://home.retail.us-phoenix-1.ocs.oc-test.com/rg

Override URL:

URL Extension:

Tile Color: Chestnut

OK and Add Another Cancel OK

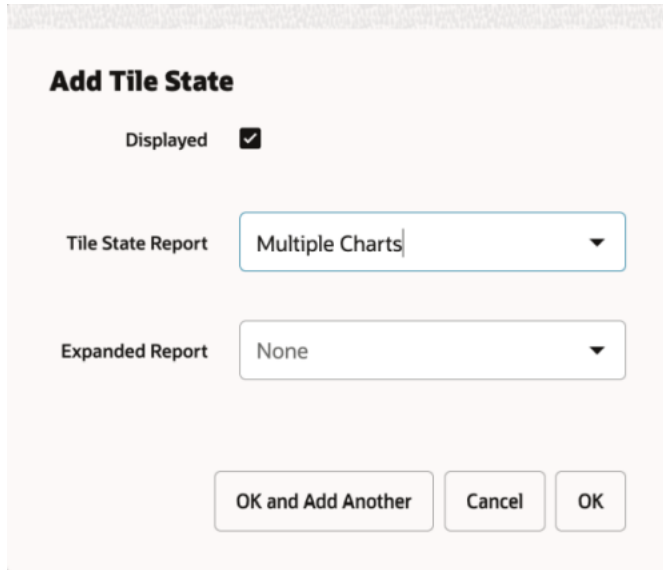
Now click through the process flow until you reach the Layouts screen. It is typical that at least one layout will already exist, as it is typical to create one for the RETAIL_HOME_ADMIN to test configurations, but if you do not have any layouts created, add one for the role of your choice, such as BATCH_ADMINISTRATOR_JOB. Once the layout is created, locate your new tile in the panels on the right and click the plus sign next to it to move it to the right-most list. Keep the tile size as 2x2.

POM Schedules 2 x 2 X

Advance to the Tile States screen.

1. Select your Role and Tile from the dropdown menus.
2. From the main table on the left side, use the Add action to add the report Multiple Charts as a tile state in this tile.
3. Ensure the Displayed checkbox is enabled.
4. Add three Multiple Charts reports to display Nightly, Hourly, and Ad hoc schedule batch metrics.

When you are finished, the configuration should appear like the example below. Click OK to save the tile state.



Add Tile State

Displayed

Tile State Report

Expanded Report

Now click on a Tile State Report and add Data Sources in the panels on the right by clicking on the Add icon.

1. The Data For should be selected as Tile State
2. Ensure the Active checkbox is enabled
3. The Name should be selected as Retail Home Report Data Service.
4. The Type should be selected as REST
5. The Source should be selected as follows for each tile.

- Nightly:

```
<pom_appserver_url>/ProcessServices/services/private/retailhome/  
schedules?cycleType=NIGHTLY&skipVersion=true
```

- Hourly:

```
<pom_appserver_url>/ProcessServices/services/private/retailhome/  
schedules?cycleType=HOURLY&skipVersion=true
```

- Ad hoc

```
<pom_appserver_url>/ProcessServices/services/private/retailhome/  
schedules?cycleType=ADHOC&skipVersion=true
```

Replace the `<pom_appserver_url>` component above with the URL appropriate for your environment.

When you are finished, the configuration should appear like below.

Add Data Source

Data For Tile State Expanded Report

Active

Name

Type

Source
Enter 1000 or fewer characters.

Click OK to save the changes and the Tile States configuration should appear like the example below.

1 Tiles 2 Application Filters 3 Layouts 4 Tile States 5 Banner and Contextual Area

Role Retail Home Tile

BATCH_ADMINISTRATOR_JOB Role, POM Schedules Tile States

Actions View + Edit X Refresh Detach Up Down

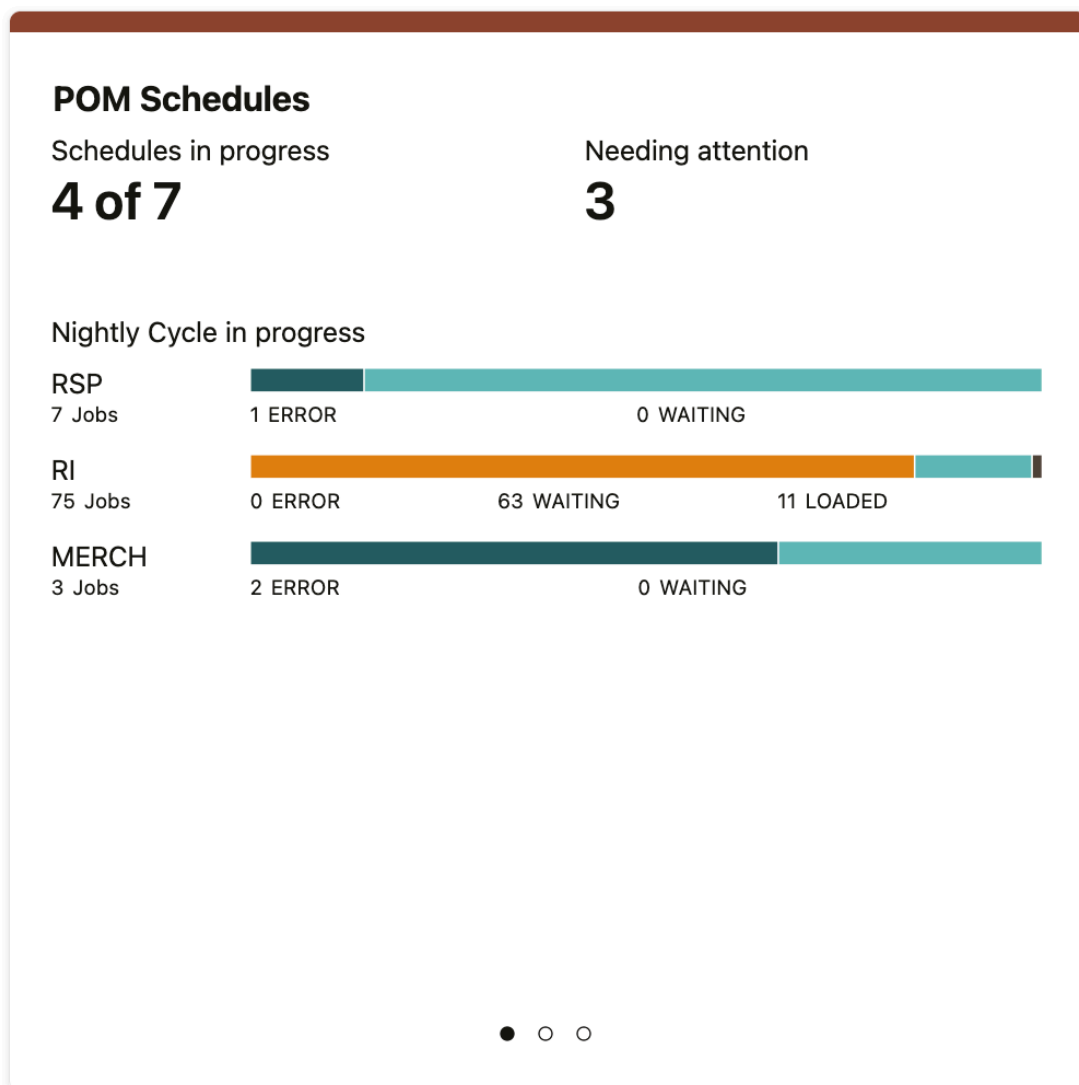
Displayed	Tile State Report	Expanded Report	Active Filters
<input checked="" type="checkbox"/>	Multiple Charts	None	0
<input checked="" type="checkbox"/>	Multiple Charts	None	0
<input checked="" type="checkbox"/>	Multiple Charts	None	0

Data Sources for Multiple Charts

Actions View + Edit X Refresh Detach

Active	Data For	Name	Type	Source
<input checked="" type="checkbox"/>	Tile State	Retail Home Report Data Service	REST	https://home.retail.us-pho

Return to the Home Dashboard tab. Select your dashboard from the dropdown menu and click Refresh to reload the tiles. If you had to create the layout, then you may need to close the tab completely and re-open it first. The new tile should appear in the dashboard and pull the data from POM Batch Scheduler.



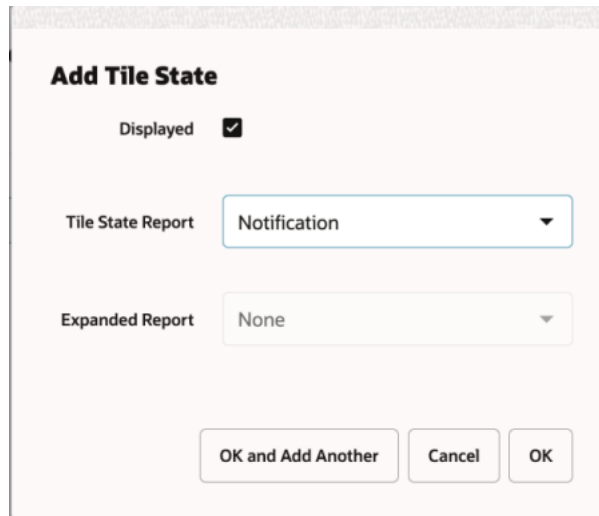
Dashboard Tiles – Favorites and Notifications

POM supports displaying the Favorites and Notifications tile states. The Favorites report will display the items (tasks, reports, etc.) that have been marked as a "favorite" by the user within the POM application. The user can click on a favorite item to launch the item in the POM application within a separate browser window. The Notifications report will display the unread notifications for the current user. The user can click on a notification to launch that notification in the POM application within a separate browser window.

The steps to configure the tile and layout are similar to creating the Batch Metrics tile. You can create one tile with two pages for Favorites and Notifications or one tile for each of them. Then advance to the Tile States screen.

1. Select your Role and Tile from the dropdown menus.
2. From the main table on the left side, use the Add action to add the report Notifications as a tile state in this tile.
3. Ensure the Displayed checkbox is enabled.

When you are finished, the configuration should appear like the example below. Click OK to save the tile state. Repeat the same steps for Favorites.



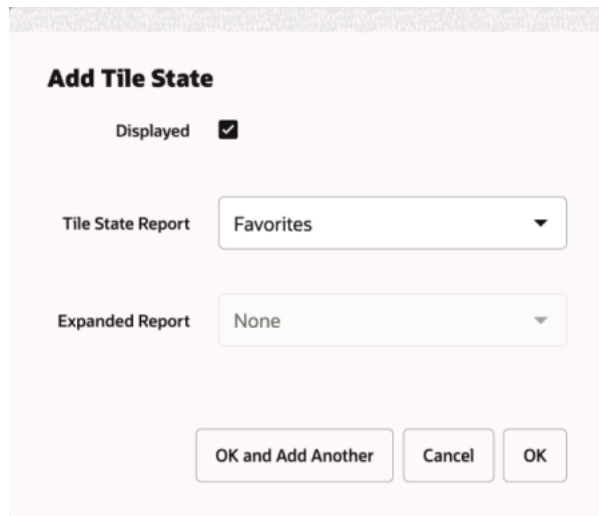
Add Tile State

Displayed

Tile State Report Notification ▼

Expanded Report None ▼

OK and Add Another Cancel OK



Add Tile State

Displayed

Tile State Report Favorites ▼

Expanded Report None ▼

OK and Add Another Cancel OK

Now click on a Tile State Report and add Data Sources in the panels on the right by clicking on the 'Add' icon.

1. Select Data For – Tile State
2. Ensure the Active checkbox is enabled
3. The Name should be automatically selected as Retail Home Favorites for favorites and Retail Home Notifications Service for notifications.
4. The Type should be selected as REST
5. The Source is the same for both notifications and favorites and should be entered as follows for each tile.

- `<pom_appserver_url>/RetailAppsPlatformServices`

Replace the `<pom_appserver_url>` with the URL appropriate for your environment.

When you are finished, the configuration should appear like below.

Add Data Source

Data For Tile State Expanded Report

Active

Name Retail Home Favorites Service ▼

Type REST ▼

Source 00-pom/RetailAppsPlatformServices
Enter 1000 or fewer characters.

Add Data Source

Data For Tile State Expanded Report

Active

Name Retail Home Notifications Servi ▼

Type REST ▼

Source 00-pom/RetailAppsPlatformServices

Click OK to save the changes and the Tile States configuration should appear like the example below.

BATCH_ADMINISTRATOR_JOB Role, POM Favorites Tile States

Displayed	Tile State Report	Expanded Report	Active Filters
<input checked="" type="checkbox"/>	Favorites	Not Applicable	0

Data Sources for Favorites

Active	Data For	Name	Type	Source
<input checked="" type="checkbox"/>	Tile State	Retail Home Favorites Service	REST	https://home.retail.us-pho

BATCH_ADMINISTRATOR_JOB Role, POM Notifications Tile States

Displayed	Tile State Report	Expanded Report	Active Filters
<input checked="" type="checkbox"/>	Notification	Not Applicable	0

Data Sources for Notification

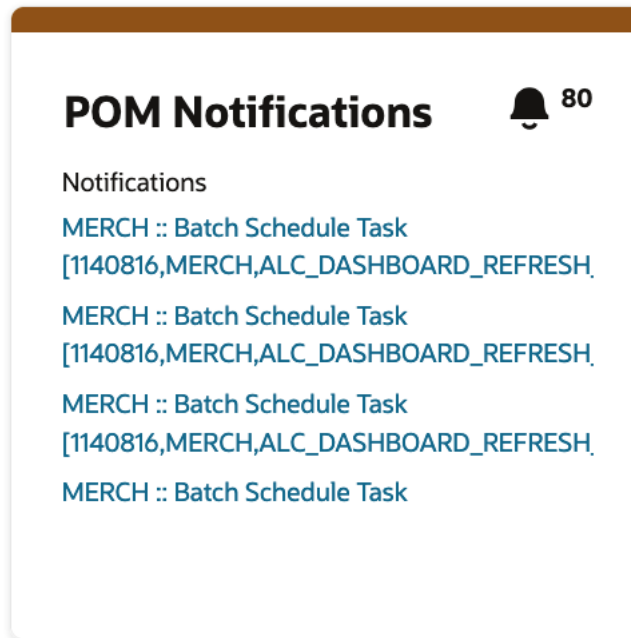
Active	Data For	Name	Type	Source
<input checked="" type="checkbox"/>	Tile State	Retail Home Notifications Service	REST	https://home.retail.us-pho

Return to the Home Dashboard tab. Select the dashboard you configured from the dropdown menu and click Refresh to reload the tiles. If you had to create the layout, then you may need to close the tab completely and re-open it first. The new tile should appear in the dashboard and pull the data from POM's Favorites and Notifications.

POM Favorites ★

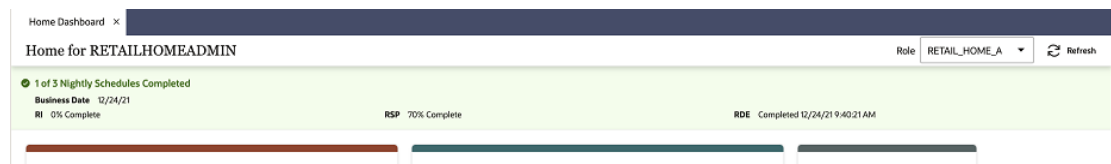
Favorite Actions

- [Batch Monitoring](#)
- [Batch Administration](#)



Batch Status Banner

For users assigned to BATCH_ADMINISTRATOR_JOB and BATCH_ADMINISTRATOR_JOB_PREPROD roles, the Retail Home Dashboard will display a Batch Schedule banner while batch jobs are currently running or active automatically when POM is added in the Application Navigator. This may be useful for your users as some Oracle Retail solutions do not allow users to access the application while a batch process is running. Please consult the product-specific documentation for more details on which solutions are impacted.



The banner displays the following for the current business date:

1. The number of schedules complete out of total number of schedules.
2. After a schedule is complete, a Complete status beside the schedule name along with the completion time.
3. If a schedule is currently running, the banner shows the percentage of completion.
4. If a schedule has not started, the banner shows 0% Complete for the schedule.

Administration Tools

Resource Bundle Customization

Process Orchestration and Monitoring supports the use of the following Retail Home tasks:

- Resource Text Strings
- Import Management

Resource Text Strings

The Resource Text Strings screen provides the capability to customize the resources present in the resource bundles in Process Orchestration and Monitoring. These text strings are used as the labels and descriptions for all metrics and attributes in the base catalog.

Resource	Base Text	Current Text	Updated Date	Updated By
jraf.about.about	About	About		
jraf.admin.fileTransfer.createdColumnLabel	Created	Created		
jraf.admin.fileTransfer.downloadColumnLabel	Download	Download		
jraf.admin.fileTransfer.downloadIconLabel	Download	Download		
jraf.admin.fileTransfer.downloadUnavailableIconLabel	Download Unavailable	Download Unavailable		
jraf.admin.fileTransfer.fileNameColumnLabel	File Name	File Name		
jraf.admin.fileTransfer.fileSizeBytesSuffix	B	B		
jraf.admin.fileTransfer.fileSizeKilobytesSuffix	KB	KB		
jraf.admin.fileTransfer.fileSizeMegabytesSuffix	MB	MB		

During or after your implementation of Process Orchestration and Monitoring, you may decide that some attributes or metrics need to be re-labeled to have more meaningful values for your users. From this screen, you can edit the default labels and they are persisted to POM as part of the nightly batch process.

Users may leverage these actions in the Resource Text Strings screen for POM data:

- Edit
- Search
- Export to Excel

Note:

You should not add or delete rows as such changes will not be picked up by POM.

Importing Management

Process Orchestration and Monitoring also supports exporting the text strings displayed in the Resource Text Strings screen, modifying them from Excel, and then importing them from the Import Management screen. Do not try to create an Excel file for import, as it would not contain the required formatting needed for importing. Instead, you should always start with an export of the data from Retail Home that you then can update. When you import the text strings, the new values should appear in the Current Text field in Resource Text Strings.

For more details on the resource bundle and import management screens, refer to the *Oracle Retail Home Administration Guide*.

Customer Modules

The Retail Home Customer Modules Management page gives customer administrators the ability to activate or deactivate provisioned applications and modules. Scheduled batch processes may also be ready to execute or halted when those processes are tied to activated or deactivated applications and modules respectively.

The Customer Modules Management page can be launched from the Retail Home Settings menu's Application Administration section. The management of customer modules in Retail Home requires applications to be configured first since information about modules resides in the applications' Module Definition Framework (MDF) data.

Module Code	Module Name	Type	Offer	Active
Oam	Process Orchestration and Monitoring	Application	POM_OFFER	Yes <input checked="" type="checkbox"/>
▼ RI	Oracle Retail Insights Cloud Service	Application	B87645	Yes <input type="checkbox"/>
▶ COMMON	RI Common component	Module	B87643,B87644,B87645	Yes <input checked="" type="checkbox"/>
▶ RCI	RCI component	Module	B87644,B87645	Yes <input checked="" type="checkbox"/>
▶ RDE_CE	RDE_CE Component	Module	B87645	No <input type="checkbox"/>
▶ RDE_RMS	RDE RMS Component	Module	B87645	No <input type="checkbox"/>
▶ RMI	RMI component	Module	B87643,B87645	Yes <input checked="" type="checkbox"/>
▶ RSP	RI base components for RSP	Module	B87645	Yes <input checked="" type="checkbox"/>

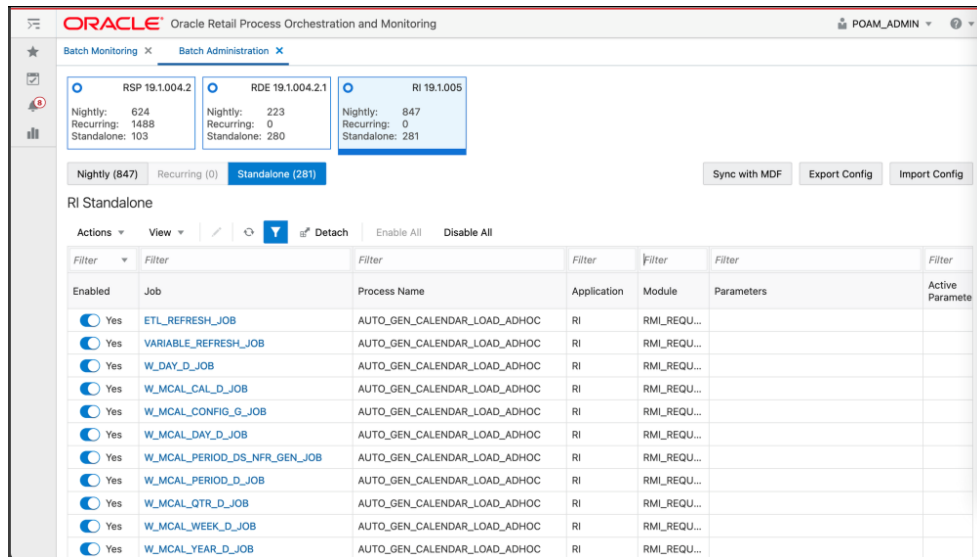
Sync Modules between Retail Home and POM

Once any module is activated or deactivated from Retail Home's Customer Module Management, the changes should be synced with POM so that the jobs for the activated modules are added to the nightly batches and the jobs for the deactivated modules are removed from the nightly batches.

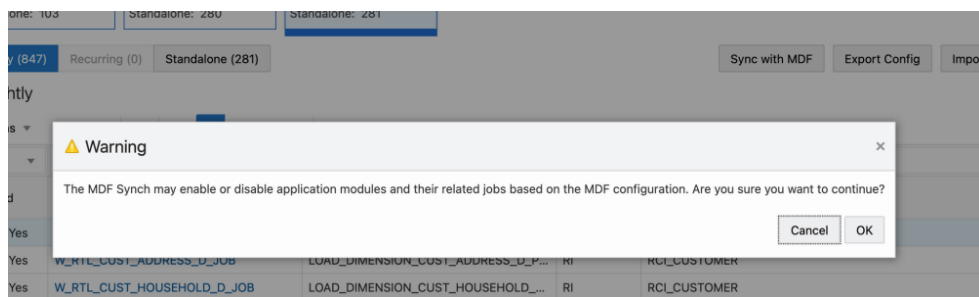
1. In Retail Home's Customer Modules Management tab, activate or deactivate a few modules using the switch



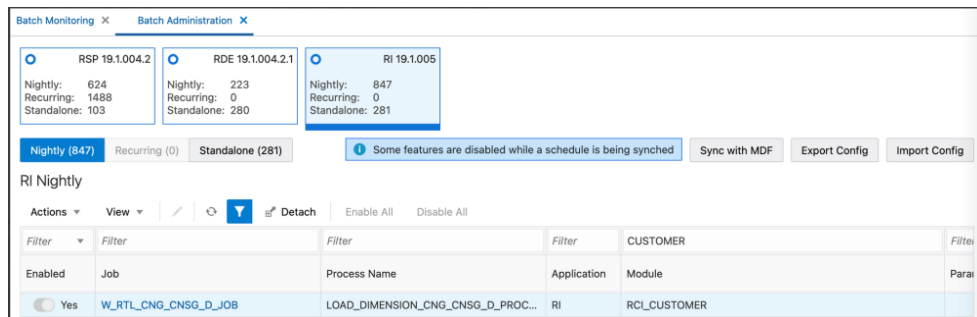
2. Click the 'Save' button in Customer Modules Management. All changes are saved.
3. Log in to POM Application URL and navigate to Tasks → Batch Administration.
4. Click on a schedule. The RI and the RI Batch Jobs are loaded in the table.



- Click the Sync with MDF button (above the table) and then the OK button in the warning message pop-up. After this button is clicked, the modules will be synced via background service calls.



- While the synchronization is in progress, a message will be displayed indicating that some features are disabled.



- Once the sync is complete, a JSON file with the batch schedule summary is downloaded. This file contains the current and previous status of an application and module in MDF and POM after sync.

- For Example:

```

{"scheduleName":"RI","synced":true,"enabledModules":
[{"state":"MATCHED_MODULE","mdfStatus":"ENABLED","prevMdfStatusIn
Pom":"ENABLED","prevStatusInPom":"ENABLED","publishToPom":true,
"applicationName":"RI","moduleName":"RMI_SI_ONORDER","matchedModu
le":true},

```

```
{
  "state": "MATCHED_MODULE", "mdfStatus": "ENABLED", "prevMdfStatusInPom": "ENABLED", "prevStatusInPom": "ENABLED", "publishToPom": true, "applicationName": "RI", "moduleName": "RMI_SI_WHOLESALE", "matchedModule": true},
  {"state": "MATCHED_MODULE", "mdfStatus": "ENABLED", "prevMdfStatusInPom": "ENABLED", "prevStatusInPom": "ENABLED", "publishToPom": true, "applicationName": "RI", "moduleName": "RMI_SI_DEAL_INCOME", "matchedModule": true},
  {"state": "MATCHED_MODULE", "mdfStatus": "ENABLED", "prevMdfStatusInPom": "ENABLED", "prevStatusInPom": "ENABLED", "publishToPom": true, "applicationName": "RI", "moduleName": "RMI_SI_NETCOST", "matchedModule": true},
  {"state": "MATCHED_MODULE", "mdfStatus": "ENABLED", "prevMdfStatusInPom": "ENABLED", "prevStatusInPom": "ENABLED", "publishToPom": true, "applicationName": "RI", "moduleName": "RMI_SI_PRICE", "matchedModule": true},
  {"state": "MATCHED_MODULE", "mdfStatus": "ENABLED", "prevMdfStatusInPom": "ENABLED", "prevStatusInPom": "ENABLED", "publishToPom": true, "applicationName": "RI", "moduleName": "RCI_SI_SALES", "matchedModule": true}
}
```

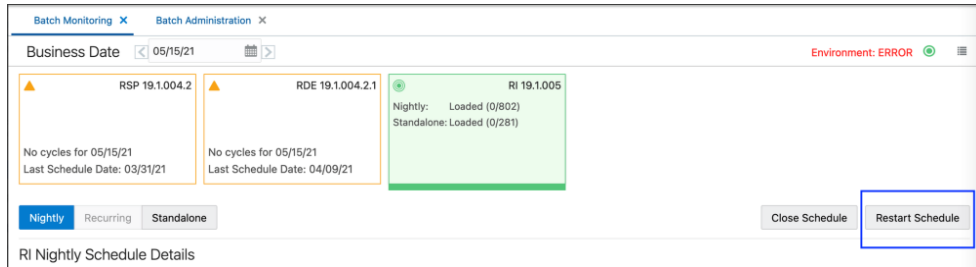
- Click the Nightly or Standalone tab above the table and enter a filter for the Module column (based on the modules that were activated/deactivated in Step 2 and click 'Enter'. The jobs are enabled or disabled based on the set-up done in Customer Modules Management. An example of jobs for RCI_CUSTOMER and RSP_CUSTOMER is shown below.

Enabled	Job	Process Name	Application	Module	Parameters
<input type="radio"/>	W_RTL_CNG_CNSG_D_JOB	LOAD_DIMENSION_CNG_CNSG_D_PROCE...	RI	RCI_CUSTOMER	
<input type="radio"/>	W_RTL_CUST_ADDRESS_D_JOB	LOAD_DIMENSION_CUST_ADDRESS_D_P...	RI	RCI_CUSTOMER	
<input type="radio"/>	W_RTL_CUST_HOUSEHOLD_D_JOB	LOAD_DIMENSION_CUST_HOUSEHOLD_...	RI	RCI_CUSTOMER	
<input type="radio"/>	W_RTL_HG_CNSG_D_JOB	LOAD_DIMENSION_HG_CNSG_D_PROCE...	RI	RCI_CUSTOMER	
<input type="radio"/>	W_HOUSEHOLD_D_JOB	LOAD_DIMENSION_HOUSEHOLD_D_PRO...	RI	RCI_CUSTOMER	
<input type="radio"/>	W_RTL_HOUSEHOLD_COMP_D_JOB	LOAD_DIMENSION_HOUSEHOLD_GROUP...	RI	RCI_CUSTOMER	
<input type="radio"/>	W_RTL_HOUSEHOLD_GRP_D_JOB	LOAD_DIMENSION_HOUSEHOLD_GROUP...	RI	RCI_CUSTOMER	
<input checked="" type="radio"/>	W_HOUSEHOLD_DS_JOB	STAGING_W_HOUSEHOLD_DS_PROCESS	RI	RCI_CUSTOMER, RSP_CUSTOMER	W_HOUSEHOLD_DS
<input type="radio"/>	W_RTL_CUST_ADDRESS_DS_JOB	STAGING_W_RTL_CUST_ADDRESS_DS_P...	RI	RCI_CUSTOMER	W_RTL_CUST_ADDRESS_DS
<input type="radio"/>	W_RTL_CUST_HOUSEHOLD_DS_JOB	STAGING_W_RTL_CUST_HOUSEHOLD_D...	RI	RCI_CUSTOMER	W_RTL_CUST_HOUSEHOLD_D...

Make Changes Effective Today

The changes are effective on the next day's batch run. However, if you want the changes to take effect on the current day, navigate to Tasks → Batch Monitoring.

- Click on a schedule, for example RI, to list the schedule's batch jobs in the table. If the jobs are not listed, change the Business Date to the Last Schedule Date to load the schedule's batch jobs.
- Click Restart Schedule button so that the MDF changes are reflected in the new schedule. Click 'OK' in the Confirmation pop-up. After a few seconds, a message is displayed indicating that the selected schedule has been restarted.



- To validate the restart updated correctly, on the same screen, filter the Job column (such as, W_HOUSEHOLD) to check the status of the jobs. The status is either Loaded or Disabled based on the switch activation in Customer Modules Management.

RI Nightly Batch Jobs

Actions View Detach Hold Release Skip Release Skip Run Rerun Skip Dependencies

Filter	W_HOUSEHOLD	Filter	Filter	Filter	Filter	Filter	Filter
Status	Job	Application	Last Update	Parameter	Process Name	Process Status	Log
Loaded	W_HOUSEHOLD_DS_JOB	RI	07/15/21 13:51:54 ...	W_HOUSE...	STAGING_W_HOUSEHOLD_DS_PROCESS	Loaded	
Disabled	W_HOUSEHOLD_D_JOB	RI	07/15/21 13:51:54 ...		LOAD_DIMENSION_HOUSEHOLD_D_PRO...	Loaded	

Subscription Metrics Dashboard

POM is not a cloud service that is sold separately and therefore does not have a metric associated with it like other cloud services. However, the report can still be used for POM in order to display the current version of the solution, as well as previous versions, if desired.

4

Merchandising Cloud Services 19.x and 23.x

This section will outline how the Merchandising Cloud Services, including Merchandising Foundation, Pricing, Allocation, and Invoice Matching, support Retail Home features.

Application Navigator Links

All Merchandising cloud services support configuring a tile to allow users to launch the individual solutions from Retail Home. This will allow your users to have a single place to access all their Merchandising cloud service links, as well as any other links configured. To do this, an entry must be configured in the Application Navigator section of Retail Home. Please refer to *Oracle Retail Home Administration Guide* for more information.

Notifications

All Merchandising cloud services support displaying user notifications in Retail Home. This will allow your users to view their Merchandising notifications across all solutions without having to log into each cloud service individually, allowing them to better prioritize their work. Notifications are configured for the Merchandising solutions based on configuring the Application Navigator links.

Favorites

All Merchandising cloud services support displaying user favorites in Retail Home. This will allow your users to launch into their most used workflows in the Merchandising solutions directly from Retail Home to act directly on insights visible in Retail Home or based on their planned activities for the day. Favorites are configured for the Merchandising solutions based on configuring the Application Navigator links.

Pre-Configured Dashboard and Tiles

If you purchased a subscription to the Merchandising Foundation Cloud Service (MFCS) there is pre-packaged Retail Home content specific to MFCS available to you. The pre-packaged content consists of a dashboard tile and two tile states.

The other Merchandising cloud services do not have a pre-packaged tile but can have tiles configured for launch into the solution and could have metrics configured for them as well using the metrics available for Retail Insights or using the Oracle Application Express (APEX) integration. See the *Oracle Retail Home Administration Guide* for more details on these configurations.

Overview

All Merchandising cloud services support configuring a tile to allow users to launch the individual solutions from Retail Home. This will allow your users to have a single place to

access all their Merchandising cloud service links, as well as any other links configured. To do this, an entry must be configured in the Application Navigator section of Retail Home. Please refer to *Oracle Retail Home Administration Guide* for more information.

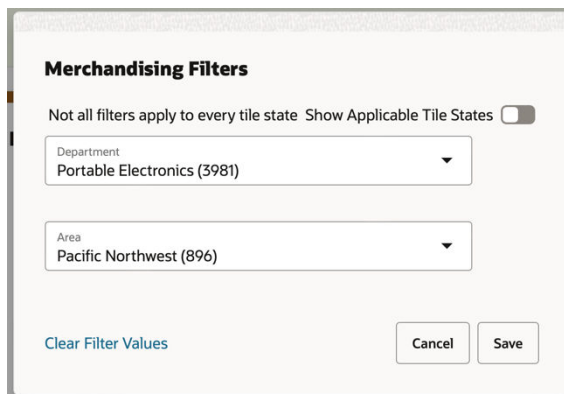
Roles

By default, the Merchandising Tile is visible to users having the INVENTORY_ANALYST_JOB role. Additional roles can be given visibility to this tile through the Retail Home Dashboard Configuration -> Layouts page. Refer to the Layout Configuration chapter in the *Oracle Retail Home Administration Guide* for more detail.

Tile Filters

The Merchandising Metrics tile is filtered by both a department and either area or store grade group. ¹This is configurable in the Application Filters page of the Dashboard Configuration task flow within Retail Home. This configuration is like the report option in Merchandising used for the Inventory Analyst dashboard. Either Area or Store Grade should be configured as Active, not both. It is recommended that the configuration in Retail Home match the Merchandising option setting. group. Both the department and location criteria are required for the tile to display data.

The filters are defined by clicking the Filter Icon (∇) on the tile. A page, like what is shown below, will display allowing the user to select a value for the filter elements that are configured for use. Once saved the values are retained for the user in future sessions but can be changed at any time.



Merchandising Filters

Not all filters apply to every tile state Show Applicable Tile States

Department
Portable Electronics (3981)

Area
Pacific Northwest (896)

Clear Filter Values Cancel Save

Report Details

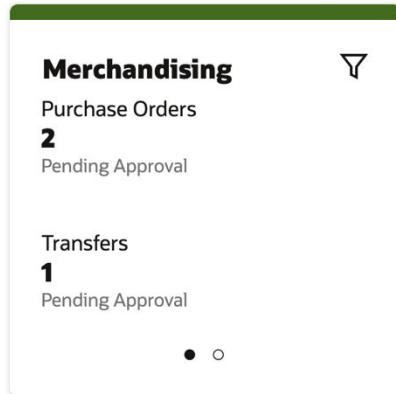
Tile State 1: Purchase Orders and Transfers Pending Approval

The first tile state displays a count of purchase orders and transfers that are pending approval. The purchase order metric is determined by counting the number of purchase orders in a Worksheet or Submitted status containing at least one item in the department and one location in the area or store grade group, as defined in the tile

¹ This is configurable in the Application Filters page of the Dashboard Configuration task flow within Retail Home. This configuration is like the report option in Merchandising used for the Inventory Analyst dashboard. Either Area or Store Grade should be configured as Active, not both. It is recommended that the configuration in Retail Home match the Merchandising option setting.

filter. This metric can be configured to include only Submitted status orders by unchecking the Show Worksheet Orders checkbox in the Report Options screen within the Merchandising application.

The transfer metric is determined by counting the number of transfers in a Submitted status containing at least one item in the department and one location (either From or To Location) in the area or store grade group, as defined in the tile filter. The count of transfers included is impacted by the Transfers Pending Approval Past Creation Date Days parameter as defined in the Report Options screen within the Merchandising application.

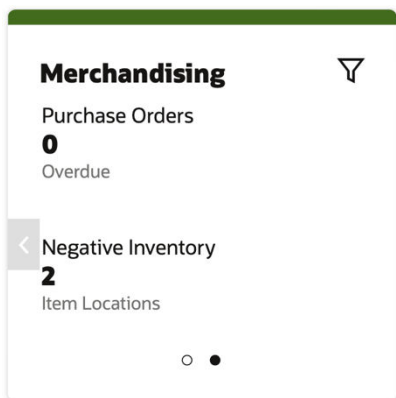


Tile State 2: Overdue Purchase Orders and Negative Inventory Item/Locations

The second tile state displays a count of purchase orders that are considered overdue and a count of items having a negative inventory balance at a location.

A purchase order is considered overdue if it is 7 days past the not-after date and has any outstanding order quantity that has not been received. These orders are considered candidates to be closed to free up open to buy, ensure future replenishment orders are not impacted, and provide more accurate data to any process or report that considers future available inventory, such as customer backorders. Like the purchase order metric in tile state 1, purchase orders considered for this metric contain at least one item in the department and one location in the area or store grade group, as defined in the tile filter.

A negative inventory scenario can occur for a variety of reasons under normal conditions, such as processing sales of an item at a location before receipts of that item are properly processed into the same location. Item/location combinations included in this metric are limited to the department and area/store grade defined in the filter.



Tile Configuration

Configuration of the tile and tile states is seeded as a part of the provisioning and installation process, including configuring the REST services used for the filters and metric information. Changes to the configuration can be made in the Dashboard Configuration flow (Settings > Dashboards & Reports > Dashboards > Dashboard Configuration).

The following REST services are available in the Merchandising Foundation Cloud Service to support these tiles:



Note:

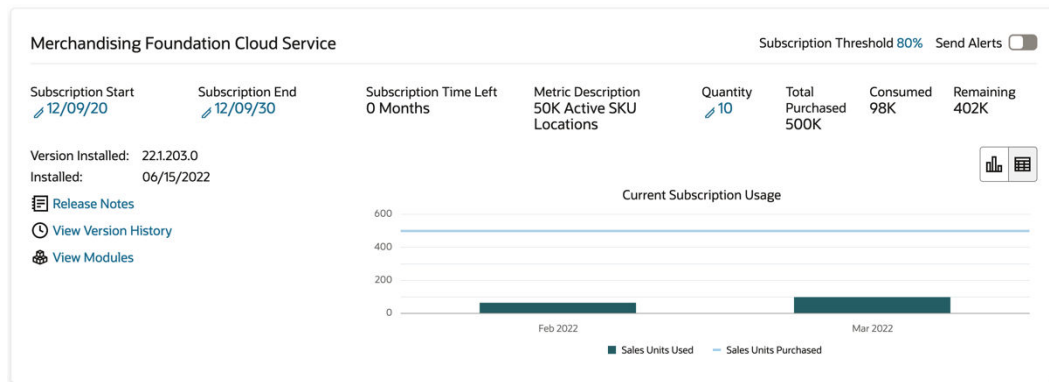
Update the <MERCH-HOST> portion of the below URLs to be those applicable for your environment.

Data	Type	URL	Parameters
Departments	Filter	https://<MERCH-HOST>/RmsReSTServices/services/private/external/departmentfilter	depIds
Areas	Filter	https://<MERCH-HOST>/RmsReSTServices/services/private/external/areafilter	areaIds
Store Grade Groups	Filter	https://<MERCH-HOST>/RmsReSTServices/services/private/external/storeGradeFilter	storeGradeIds
Tile State 1 Metrics	Data Service	https://<MERCH-HOST>/RmsReSTServices/services/private/external/firstTileDetails	N/A
Tile State 2 Metrics	Data Service	https://<MERCH-HOST>/RmsReSTServices/services/private/external/secondTileDetails	N/A

Subscription Metric Report

In addition to the business metrics described above, the Merchandising cloud services can be configured to provide subscription usage metrics on Retail Home to the administrator. This report provides visibility to how many active item/locations exist by month, which is the metric used for all Merchandising cloud services.

This report is visible by navigating to Settings -> Application Administration -> Application Dashboard. Additional details for using the subscription metrics report, such as inputting or editing the subscription start/end dates and the subscription quantity, can be found in the *Retail Home Administration Guide*.



Metric Data

Merchandising has a process that will capture data to appear in this report via a batch process (Subscription Metrics Update Job) that must be scheduled. Instructions for configuring the Merchandising Foundation Cloud Service to capture the data displayed in the Subscription Metrics report can be found in the *Merchandising Foundation Cloud Service Operations Guide volume 1*.

Resource Bundle Customization

Resource bundles are used in the standard manner outlined in the *Oracle Retail Home Administration Guide* across all Merchandising cloud services; however, this is not the only method used by Merchandising cloud services. Merchandising cloud services, especially many of the labels used for Merchandising Foundation, also use other methods to support customer configuration of labels. For more details on the other configuration methods see the implementation guides for these cloud services, such as the Codes and Descriptions section of the *Oracle Retail Merchandising Foundation Implementation Guide*.

Customer Module Management

Customer Module Management is used for the Merchandising cloud services for controlling the enablement of certain batch configurations. For more on controlling batch modules in Retail Home, see the Process Orchestration and Management section of this document.

Managing access to modules of the user interfaces for the Merchandising cloud services is controlled in the cloud services themselves, usually based on system options configurations or security privileges. For more on configuring Merchandising cloud service modules using these methods see the implementation guides and security guides for each of the services.

5

Supplier Evaluation Cloud Service 23.x

This section outlines how the Supplier Evaluation Cloud Service supports Retail Home features.

Application Navigator Links

Supplier Evaluation cloud service supports configuring a tile to allow users to launch the individual solution from Retail Home. This will allow your users to have a single place to access Supplier Evaluation cloud service links, as well as any other links configured. To do this, an entry must be configured in the Application Navigator section of Retail Home. Please refer to *Oracle Retail Home Administration Guide* for more information.

Notifications

Notifications are not currently supported by Supplier Evaluation.

Favorites

Favorites are not currently supported by Supplier Evaluation.

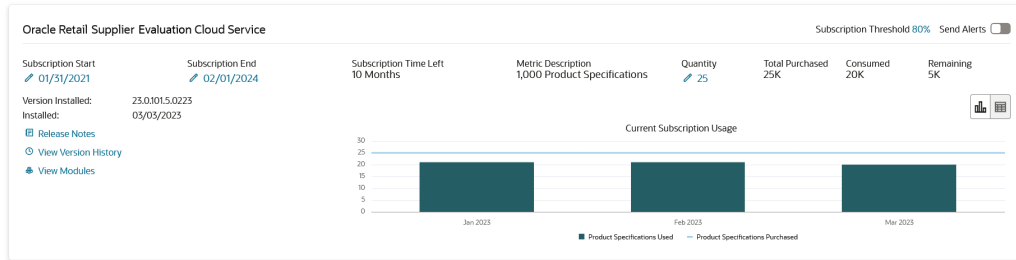
Pre-Configured Dashboard and Tiles

Pre-Configured Dashboard and Tiles are not currently supported by Supplier Evaluation.

Subscription Metric Report

The Supplier Evaluation cloud service can be configured to provide subscription usage metrics on Retail Home to the administrator. This report provides visibility of the usage by month.

This report is visible by navigating to Settings -> Application Administration -> Application Dashboard. Additional details for using the subscription metrics report, such as inputting or editing the subscription start/end dates and the subscription quantity, can be found in the *Retail Home Administration Guide*.



Metric Data

Supplier Evaluation has a process that will capture data to appear in this report via a batch process (Subscription Metrics Update Job) that is scheduled to run on a weekly basis.

Resource Bundle Customization

Resource Bundle Customization is not currently supported by Supplier Evaluation.

Customer Module Management

Customer Module Management is not currently supported by Supplier Evaluation.

6

Brand Compliance Management Cloud Service 23.x

This section outlines how the Brand Compliance Management Cloud Service supports Retail Home features.

Application Navigator Links

Brand Compliance Management Cloud Service supports configuring a tile to allow users to launch the individual solution from Retail Home. This will allow your users to have a single place to access Brand Compliance Management Cloud Service links, as well as any other links configured. To do this, an entry must be configured in the Application Navigator section of Retail Home. Please refer to *Oracle Retail Home Administration Guide* for more information.

Notifications

Notifications are not currently supported by Brand Compliance Management Cloud Service.

Favorites

Favorites are not currently supported by Brand Compliance Management Cloud Service.

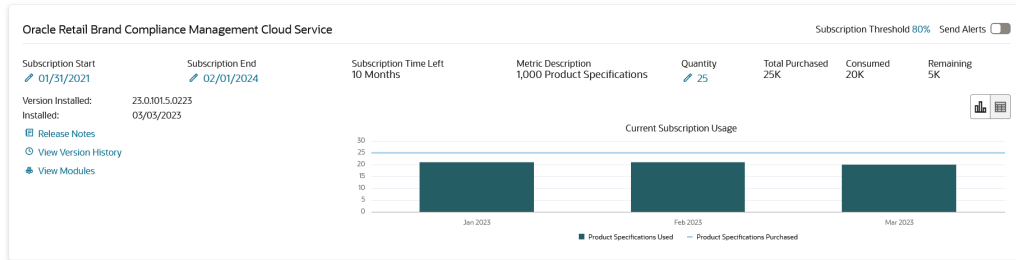
Pre-Configured Dashboard and Tiles

Pre-Configured Dashboard and Tiles are not currently supported by Brand Compliance Management Cloud Service.

Subscription Metric Report

The Brand Compliance Management Cloud Service can be configured to provide subscription usage metrics on Retail Home to the administrator. This report provides visibility of the usage by month.

This report is visible by navigating to Settings -> Application Administration -> Application Dashboard. Additional details for using the subscription metrics report, such as inputting or editing the subscription start/end dates and the subscription quantity, can be found in the *Retail Home Administration Guide*.



Metric Data

Brand Compliance Management Cloud Service has a process that will capture data to appear in this report via a batch process (Subscription Metrics Update Job) that is scheduled to run on a weekly basis.

Resource Bundle Customization

Resource Bundle Customization is not currently supported by Brand Compliance Management Cloud Service.

Customer Module Management

Customer Module Management is not currently supported by Brand Compliance Management Cloud Service.

7

Store Inventory Operations Cloud Service 19.x and 23.x

This section will outline how the Store Inventory and Operations Cloud Service supports Retail Home features.

Application Navigator Links

Launching the SIOCS client from Retail Home requires an entry to be made under the application navigator section of Retail Home. Please refer to *Oracle Retail Home Administration Guide* for information.

The SIOCS application configuration should look like this:

The screenshot shows a dialog box titled "Add Application Info" with the following configuration:

- Seeded: No
- Application Navigator:
- Application Name: Store Inventory Operations Cloud Servi
- Color Set: Cyan
- Application Code: SIOCS
- Application Link: https://bur00afs-ext-vip1.us.oracle.com
- Platform Service:

A sub-dialog box is open, showing:

- URL: https://bur00afs-ext-vip1.us.oracle.co
- Supported: Notifications
- Features: Favorites
- Resource Bundle Customization

Buttons at the bottom include "Import Role Mapping Choose File", "OK and Create Another", "Cancel", and "OK".

- **Seeded:** Disabled and set to No.
- **Application Navigator:** Enable it to launch SIOCS client from Retail Home.
- **Application Name:** The name of the application: Store Inventory Operations Cloud
- **Color Set:** Any color that you want to allocate to SIOCS.
- **Application Code:** Select SIOCS from the drop-down.
- **Application Link:** The URL of your SIOCS web client.
- **Platform Service:** Enable it to use the Favorites feature.

- **URL:** The base URL of the platform services. The URL would be of the form `https://<SIOCS-HOST>/RetailAppsPlatformServices`
<SIOCS-HOST> is the same host in your SIOCS web client URL.
- **Supported Features:** Check only the favorites feature.

**Note:**

Users need to be part of the RETAIL_HOME_ADMIN security group in order to access Application Navigator in Retail Home.

Notifications

Notifications are not supported in Retail Home for SIOCS. See the *SIOCS Administration Guide* for how this feature is used in SIOCS.

Favorites

SIOCS supports displaying user favorites in Retail Home. This will allow your users to launch into their most used workflows in the SIOCS directly from Retail Home to act directly on insights visible in Retail Home or based on their planned activities for the day. Favorites are configured for the SIOCS solutions based on configuring the Application Navigator link as described above.

Pre-Configured Dashboards and Tiles

There is pre-packaged Retail Home content specific to SIOCS available in the form of two metric reports that can be configured as tiles on the Retail Home dashboard.

Overview

SIOCS supports two metric reports:

- Shop Floor Out of Stock Items
- Stock Counts - Ready to Authorize

Adding an application navigator entry for SIOCS will automatically configure tiles on Retail Home.

The data seed features do the following:

1. Creates the SIOCS reports and tiles on the Retail Home dashboard.
2. Maps the tiles to the default role (RETAIL_HOME_USERS).
3. Configures the tile states and connects them to the SIOCS REST endpoints.

After all the configuration, you should be able to see tiles on the dashboard. They should look like the ones below:



Roles

Users should be a part of retail_home_users IDCS or OCI IAM application role to access these endpoints and tiles. For convenience, SIOCS also provides a RETAIL HOME security role that captures the security permissions required to access these operational views. The user still needs appropriate functional area permissions to navigate to transaction detail screens.

In addition to the retail_home_users IDCS or OCI IAM group, the following IDCS or OCI IAM groups also need to be assigned to all RH users to be able to access platform features (for example, Favorites):

- psraf_users

The naming convention for the group is <EICS_IDCS_APP_DISPLAY_NAME>.psraf_users where EICS_IDCS_APP_DISPLAY_NAME is the display name of EICS app on IDCS or OCI IAM.

- psraf_admin_users

The naming convention for the group is <EICS_IDCS_APP_DISPLAY_NAME>.psraf_admin_users where EICS_IDCS_APP_DISPLAY_NAME is the display name of EICS app on IDCS or OCI IAM.

These IDCS or OCI IAM groups are scoped globally so in order to differentiate between deployment types, the group names are prefixed by the application name to which they belong. This allows a customer security administrator to assign an IDCS or OCI IAM group to a user on one deployment and not on others.

Filters

No filters exist for these reports.

Report Details

Shop Floor – Out of Stock

The metric on this tile indicates the number of items for the user's store are currently out of stock. SIOCS also has an operational view in the application that can give the user a store and item level breakdown of the information displayed on the tile. This view is available under Operations - Operational Views - Shopfloor Out of Stock menu.

Stock Count – Ready to Authorize

The metric on this tile indicates the number of stock counts that are ready to be authorized by the user. SIOCS also has an operational view in the application that can give the user a more detailed breakdown of the information displayed on the tile, available under Operations - Operational Views – Stock Count – Ready to Authorize menu.

Tile Configuration

Configuration of the tile and tile states is seeded as a part of the provisioning and installation process, including configuring the REST services used for the filters and metric information. Changes to the configuration can be made in the Dashboard Configuration flow (Settings > Dashboards & Reports > Dashboards > Dashboard Configuration).

The following REST services support these tiles:

Operation View	19.x Endpoint	22.x Endpoint
Shopfloor Out of Stock	<code>https://<EICS-HOSTNAME>/sim-mobile/internal/rhreports/outofstock/shopfloor/tile</code>	<code>https://<domain>/siocs-client-services/internal/rhreports/outofstock/shopfloor/tile</code>
Stock Count - Ready To Authorize	<code>https://<EICS-HOSTNAME>/sim-mobile/internal/rhreports/readytoauthorize/tile</code>	<code>https://<domain>/siocs-client-services/internal/rhreports/readytoauthorize/tile</code>

Subscription Metric Report

In addition to the business metrics described above, the SIOCS can be configured to provide subscription usage metrics on Retail Home to the administrator. The metrics used for subscription usage calculation and the monthly usage for a month is:

- **Enterprise Inventory Cloud Service (EICS):** The total quantity of items that were sold and returned plus the total quantity of items that were fulfilled as part of web orders. Running usage is defined pooled monthly usage over the subscription period starting from the subscription start date until the usage date.
- **Store Operations Cloud Service (SOCS):** The distinct users that logged into SOCS. Running usage is defined as average monthly usage during a subscription year within the subscription period where each subscription year is 12 months long.

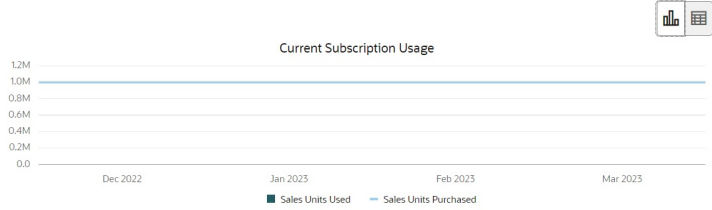
This report is visible by navigating to Settings -> Application Administration -> Application Dashboard. Additional details for using the subscription metrics report,

such as inputting or editing the subscription start/end dates and the subscription quantity, can be found in the *Retail Home Administration Guide*.

Enterprise Inventory Cloud Service Subscription Threshold 80% Send Alerts

Subscription Start [13/08/2021](#) Subscription End [12/08/2024](#) Subscription Time Left 16 Months Metric Description Pooled Transaction Usage Quantity [1](#) Total Purchased 1000000 Consumed 457 Remaining 999543

Version Installed: Multiple
[View Version History](#)
[View Modules](#)



Enterprise Inventory Cloud Service Subscription Threshold 80% Send Alerts

Subscription Start [13/08/2021](#) Subscription End [12/08/2024](#) Subscription Time Left 16 Months Metric Description Pooled Transaction Usage Quantity [1](#) Total Purchased 1000000 Consumed 457 Remaining 999543

Version Installed: Multiple
[View Version History](#)
[View Modules](#)

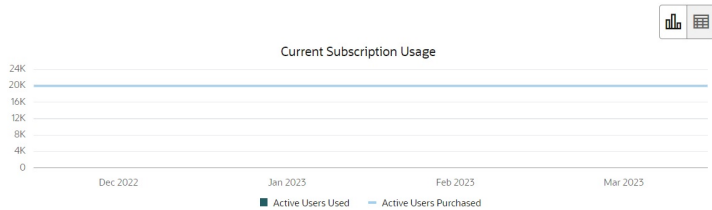
Current Subscription Usage

Date	Sales Units Used	Sales Units Purchased
Dec 2022	10	1000000
Jan 2023	15	1000000
Feb 2023	258	1000000

Store Operations Cloud Service Subscription Threshold 80% Send Alerts

Subscription Start [13/08/2021](#) Subscription End [12/08/2024](#) Subscription Time Left 16 Months Metric Description Average Active Users Quantity [20](#) Total Purchased 20000 Consumed 1 Remaining 19999

Version Installed: 23.1.101.0
 Installed: 22/09/2022
[Release Notes](#)
[View Version History](#)
[View Modules](#)



Store Operations Cloud Service Subscription Threshold 80% Send Alerts

Subscription Start 13/08/2021	Subscription End 12/08/2024	Subscription Time Left 16 Months	Metric Description Average Active Users	Quantity 20	Total Purchased 20000	Consumed 1	Remaining 19999
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Version Installed: 23.1101.0
Installed: 22/09/2022

- Release Notes
- View Version History
- View Modules

Current Subscription Usage

Date	Active Users Used	Active Users Purchased
Dec 2022	2	20000
Jan 2023	2	20000
Feb 2023	2	20000

Metric Data

In order to provide data to this report, SIOCS must be configured to run a batch process to extract subscription usage for both EICS and SOCS during the subscription period. The extracted metrics are then pushed to platform services from where Retail Home displays the data in the report.

Instructions for running the SIOCS batch to capture the data displayed in the Subscription Metrics report on Retail Home can be found in the *Oracle Retail Enterprise Inventory Cloud Service Administration Guide*, Chapter 7: Integration under Retail Home Integration-> Subscription Usage Batch.

Resource Bundle Customization

SIOCS doesn't support Resource Bundle Customization through Retail Home. See the *SIOCS Administration Guide* for how this feature is used in SIOCS.

Customer Module Management

SIOCS does not leverage the Customer Module Management functionality in Retail Home.

8

Customer Engagement 19.x and 20.x+

This section will outline how the Customer Engagement Cloud Service supports Retail Home features.

Application Navigator Links

Launching the CE from Retail Home requires an entry to be made under the application navigator section of Retail Home. Please refer to *Oracle Retail Home Administration Guide* for information on configuration. The CE configuration should look like this:

The screenshot shows a configuration panel for the Application Navigator. At the top, there is a toggle switch for 'Application Navigator' which is turned on. Below this are several input fields: 'Application Name' with the value 'Customer Engagement', 'Color Set' with a dropdown menu showing 'Chestnut', 'Application Code' with a dropdown menu showing 'ORCE', and 'Application Link' with the URL 'cs.oc-test.com/rgbu-rex-rgbu-stg83-cecs/ui/'. At the bottom, there is another toggle switch for 'Platform Service' which is also turned on. Below this toggle is a section titled 'Supported Features' which contains three checkboxes: 'Notifications' (checked), 'Favorites' (checked), and 'Resource Bundle Customization' (unchecked). Above the 'Supported Features' section, there is a 'URL' field with the value 'RetailAppsPlatformServices'.

- **Application Navigator:** Turn on to launch CE from Retail Home.
- **Application Name:** Customer Engagement
- **Color Set:** Any color that you want to allocate to CE.
- **Application Code:** Select ORCE from the drop-down
- **Application Link:** Your URL for Customer Engagement
- **Platform Service:** Turn on to use the Notifications and Favorites features.

- **URL:** The base URL of the platform services. The URL would be of the form

```
https://<CE-HOST>/RetailAppsPlatformServices
```

```
<CE-HOST>
```

is the same host in your CE URL.

- **Supported Features:** Check notifications and favorites.



Note:

Users need to be part of the RETAIL_HOME_ADMIN security group to access Application Navigator in Retail Home.

Notifications

Customer Engagement supports displaying user notifications in Retail Home. This will allow your users to view their Customer Engagement notifications across all solutions without having to log into each cloud service individually, allowing them to better prioritize their work. Notifications are configured for the Customer Engagement solution based on configuring the Application Navigator links.

Favorites

Customer Engagement supports displaying user favorites in Retail Home. This will allow your users to launch into their most used workflows in the Customer Engagement solution directly from Retail Home to act directly on insights visible in Retail Home or based on their planned activities for the day. Favorites are configured for the Customer Engagement solution based on configuring the Application Navigator links.

Pre-configured Dashboards and Tiles

Instead of the seed data configuration used in other services, Customer Engagement provides the data that could be used in tiles as REST services that can be configured as works best for your business.

For example, you could create a custom report on CE segments that includes the following metrics

Metric	URL
Total number of customers for a segment	<code>https://<hostname>/ui/jet/rest/metrics/segments/segmentCustomersService/<segmentId></code>

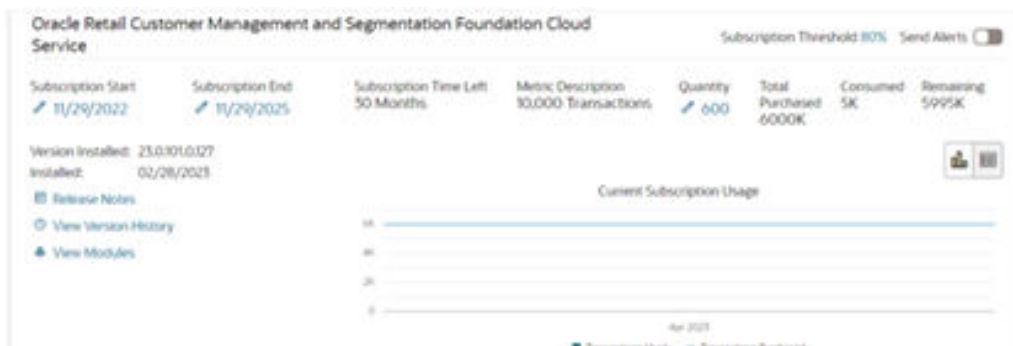
Metric	URL
Average purchases for a segment	<code>https://<hostname>/ui/jet/rest/metrics/segments/segmentAveragePurchasesService/<segmentId></code>
Total purchases for a segment	<code>https://<hostname>/ui/jet/rest/metrics/segments/segmentTotalSpendService/<segmentId></code>

See the *Retail Home Administration Guide* for details on configuring custom tile state reports and report data requirements to see how to use existing CE REST services to create a report in Retail Home.

Subscription Metric Report

Customer Engagement cloud services can be configured to provide subscription usage metrics in Retail Home to the administrator. This report provides visibility to how many transactions exist by month, which is the metric used for all Customer Engagement cloud services.

This report is visible by navigating to Settings -> Application Administration -> Application Dashboard. Additional details for using the subscription metrics report, such as inputting or editing the subscription start/end dates and the subscription quantity, can be found in the *Retail Home Administration Guide*.



Note:

Statistics for the report are gathered through an automated job that is set up automatically when the system is created.

Resource Bundle Customization

Resource Bundle Customization is not supported by Customer Engagement.

Customer Module Management

CE does not leverage the Customer Module Management functionality in Retail Home.

9

Assortment and Item Planning 19.x and Assortment Planning 23.x

Dashboards and Tiles



Note:

The terms Assortment Planning and AP will be used to refer to both Assortment and Item Planning 19.x and Assortment Planning 22.x.

The Assortment Planning (AP) solution provides support for Retail Home tile content. Tiles can display information to provide a picture of the performance of a user's plans and metrics about the overall health of the business as a whole. Assortment Planning 22.x also supports the use of Retail Home's resource bundle customization (RBC) to allow customization of many of the labels displayed within the AP application. Additionally, the AP solution supports attaching Data Visualizer (DV) reports to tiles to allow users to launch into reports relevant to the metrics displayed. Users may also display Assortment Planning data that is integrated into DV via custom BI template reports as detailed in the Retail Home Templates from RI section above.

The content of the tiles displayed in Retail Home for the Assortment Planning application are determined by a set of configuration resources. These resources are created as a part of the configuration of the application and allow for the same level of flexibility and configurability as the overall application.

The values displayed within the Assortment Planning tile in Retail Home are not pulled in real time from the live data stored within the Planning Data Store. The data is instead drawn from the same source as the data displayed in the in-app dashboard for the solution. This means that the values displayed in Retail Home will be synchronized with the values within the Assortment Planning dashboard; allowing users to launch into the solution and gain more insight into the displayed metrics. It also means that the values displayed within Retail Home will not update automatically; they will only update when the in-app dashboard is refreshed.

Customers using the AP Template application will find a set of pre-configured tiles available for their use. These tiles states associated with a tile correspond to pre-defined business roles within the AP Template application and provide a set of metrics appropriate for that business role. The AP template application has also been pre-configured with the measures and rules necessary to provide the information used by the template tile states to Retail Home. Information on these pre-configured tiles and their contents can be found in the Retail Home section of chapter 1 AP Batch Task Administration of the *Oracle Retail Assortment Planning Cloud Service Administration Guide*.

Customers using a customized version of Assortment Planning will need to provide a custom configuration for Retail Home tiles, as detailed within the Retail Predictive Application Server Cloud Edition chapter of this guide.

Seeding Retail Home Data

The AP solution does not make use of the Refresh Seed data task in Application Navigator. Instead, an administration task must be run within the Assortment Planning application by a user with application administrator privileges. The Retail Home Seeding task provides Retail Home with information about the tiles for the AP solution as well as configuring metadata within the application to allow the solution to provide the correct application data to Retail Home.

For information about the Retail Home Seeding task, please consult the Batch Administration chapter of the Oracle Retail Predictive Application Server Cloud Service Administration Guide.

Additionally, it is required for a user to have built an application dashboard workspace within the Assortment Planning application for that user to see information within the AP tile of Retail Home. AP uses the information within the Dashboard workbook to calculate and return the values requested by Retail Home. Therefore, when the AP solution is first built, the Schedule Dashboard Build task must run the application for all users. The Schedule Dashboard Build task must also be run for new users when those users are registered in the application so that they will have Retail Home tile data available. For information on the Schedule Dashboard Build task, please consult the System Administration chapter of the Oracle Retail Predictive Application Server Cloud Edition Administration Guide.

 **Note:**

Information on these pre-configured tiles and their contents can be found in the Retail Home section of chapter 1 “AP Batch Task Administration” of the *Oracle Retail Assortment Planning Cloud Service Administration Guide* for Assortment Planning 22.x and chapter 1 A&IP Batch Task Administration of the *Oracle Retail Assortment and Item Planning for Fashion/Soft Lines Cloud Service Administration Guide* for Assortment and Item Planning 19.x

Retail Home Content for Customized Applications

Customers using the template solution can customize the content displayed in Retail Home. Customers using a customized solution (one created either partially or fully through custom application configuration) must provide a custom Retail Home configuration to match the custom content of the application.

In either case, the process for providing custom Retail Home content is the same. This information can be found in the Retail Predictive Application Server Cloud Edition chapter of this guide.

Administration Tools

Resource Bundle Customization

In versions 22.x and above, the AP solution supports the use of the Retail Home Resource Bundle Customization framework for customization and translation of some but not all labels and messages seen within the solution. For these strings, an administrative task is available in Retail Home to allow searching for and viewing supported strings, customizing strings, and restoring customizations to default values.

Other labels and messages seen within the product such as those based upon metadata of the application, or error messages reporting a problem performing an activity on the server such as a custom action, are managed through the in-application Translation Administration administrative task or batch uploads of translated content.

Strings supporting Resource Bundle Customization include:

- Labels for controls such as menus, buttons (but not custom actions), etc.
- Messages displayed in toast and snackbar notifications in response to user actions
- Validation messages provided within the UI

For these strings, customization of individual strings and for large numbers of strings can be achieved using the Resource Text Strings and Import Management tasks in Retail Home

The strings used by the AP solution are contained within the AP Cloud Service, the RpasBundle, and the RpasMessages bundles.

Information on using the Resource Text Strings and Import Management tasks can be found in the Resource Bundles chapter of the Oracle Retail Home Administration Guide.

Strings not managed through the RBC framework include:

- Labels of dimension, measures, and positions
- View and Dimension labels
- Custom action button labels
- Messages received from the server detailing failures in submitted actions

These strings are managed internally by the app, as detailed in the Internationalization chapter of the *Oracle Retail Predictive Application Cloud Service Administration Guide*.

Email Notifications for Batch Tasks

Retail Home supports the configuration of email notifications in response to activities like the success and failure of Online Administration Tools tasks. Information on the process of setting up such notifications can be found in the Online Administration Tools chapter of the Oracle Retail Predictive Application Cloud Service Administration Guide.

Merchandise Financial Planning 19.x and 23.x

Dashboards and Tiles

Dashboards and Tiles

The Merchandise Financial Planning (MFP) solution provides support for Retail Home tile content. Tiles can display information to provide a picture of the performance of a user's plans and metrics about the overall health of the business as a whole. Merchandise Financial Planning 22.x also supports the use of Retail Home's resource bundle customization (RBC) to allow customization of many of the labels displayed within the AP application. Additionally, the MFP solution supports attaching Data Visualizer (DV) reports to tiles to allow users to launch into reports relevant to the metrics displayed. Users may also display Assortment Planning data that is integrated into DV via custom BI template reports as detailed in the Retail Home Templates from RI section above.

The content of the tiles displayed in Retail Home for the Merchandise Financial Planning application are determined by a set of configuration resources. These resources are created as a part of the configuration of the application and allow for the same level of flexibility and configurability as the overall application.

The data values displayed within the Merchandise Financial Planning tiles in Retail Home are not pulled in real time from the live data stored within the Planning Data Store. The data is instead drawn from the same source as the data displayed in the in-app dashboard for the solution. This means that the values displayed in Retail Home will be synchronized with the values within the MFP dashboard; allowing users to launch into the solution and gain more insight into the displayed metrics. It also means that the values displayed within Retail Home will not update automatically; they will only update when the in-app MFP dashboard is refreshed.

Customers using the MFP Template application will find a set of pre-configured tiles available for their use. These tiles states associated with a tile correspond to pre-defined business roles within the MFP Template application and provide a set of metrics appropriate for that business role. The MFP template application has also been pre-configured with the measures and rules necessary to provide the information used by the template tile states to Retail Home. Information on these pre-configured tiles and their contents can be found in the Retail Home section of chapter 1 MFP Batch Task Administration of the Oracle Retail Merchandise Financial Planning Cloud Service Administration Guide.

Customers using a customized version of Merchandise Financial Planning will need to provide a custom configuration for Retail Home tiles, as detailed within the Retail Predictive Application Server Cloud Edition chapter of this guide.

Seeding Retail Home Data

The MFP solution does not make use of the Refresh Seed data task in Application Navigator. Instead, an Administration task must be run within the application by a user with Merchandise Financial Planning application administrator privileges. The Retail Home Seeding task provides Retail Home with information about the tiles for the MFP solution as well as

configuring metadata within the application to allow the solution to provide the correct application data to Retail Home.

For information about the Retail Home Seeding task, please consult the Batch Administration chapter of the Oracle Retail Predictive Application Server Cloud Service Administration Guide.

Additionally, it is required for a user to have a built an-application Dashboard workspace within the Merchandise Financial Planning application for that user to see information within the MFP tile of Retail Home. MFP uses the information within the Dashboard workbook to calculate and return the values requested by Retail Home. Therefore, when the MFP solution is first built, the Schedule Dashboard Build task must run the application for all users. The Schedule Dashboard Build task must also be run for new users when those users are registered in the application so they will have Retail Home tile data available. For information on the Schedule Dashboard Build task, please consult the System Administration chapter of the Oracle Retail Predictive Application Server Cloud Edition Administration Guide.

Retail Home Content for Customized Applications

Customers using the template solution can customize the content displayed in Retail Home. Customers using a customized solution (one created either partially or fully through custom application configuration) must provide a custom Retail Home configuration to match the custom content of the application.

In either case, the process for providing custom Retail Home content is the same. This information can be found in the Retail Predictive Application Server Cloud Edition chapter of this guide.

Administration Tools

Resource Bundle Customization

In versions 22.x and above, the MFP solution supports the use of the Retail Home Resource Bundle Customization framework for customization and translation of some but not all labels and messages seen within the solution. For these strings, an administrative task is available in Retail Home to allow searching for and viewing supported strings, customizing strings, and restoring customizations to default values.

Other labels and messages seen within the product such as those based upon metadata of the application, or error messages reporting a problem performing an activity on the server such as a custom action, are managed through the in-application Translation Administration administrative task or batch uploads of translated content.

Strings supporting Resource Bundle Customization include:

- Labels for controls such as menus, buttons (but not custom actions), etc.
- Messages displayed in toast and snackbar notifications in response to user actions
- Validation messages provided within the UI

For these strings, customization of individual strings and for large numbers of strings can be achieved using the Resource Text Strings and Import Management tasks in Retail Home.

The strings used by the MFP solution are contained within the MFP Cloud Service, the RpasBundle, and the RpasMessages bundles.

Information on using the Resource Text Strings and Import Management tasks can be found in the Resource Bundles chapter of the Oracle Retail Home Administration Guide.

Strings not managed through the RBC framework include:

- Labels of dimension, measures, and positions
- View and Dimension labels
- Custom action button labels
- Messages received from the server detailing failures in submitted actions

These strings are managed internally by the app, as detailed in the Internationalization chapter of the Oracle Retail Predictive Application Cloud Service Administration Guide.

Email Notifications for Batch Tasks

Retail Home supports the configuration of email notifications in response to activities like the success and failure of Online Administration Tools tasks. Information on the process of setting up such notifications can be found in the Online Administration Tools chapter of the Oracle Retail Predictive Application Cloud Service Administration Guide.

Retail Demand Forecasting 19.x and 23.x

Dashboards and Tiles

The Retail Demand Forecasting (RDF) solution provides support for Retail Home tile content. Tiles can display information to provide a picture of the performance of a user's forecasts and metrics about the overall health of the business as a whole.

Retail Demand Forecasting 22.x also supports the use of Retail Home's resource bundle customization (RBC) to allow customization of many of the labels displayed within the AP application. Additionally, the RDF solution supports attaching Data Visualizer (DV) reports to tiles to allow users to launch into reports relevant to the metrics displayed. Users may also display Assortment Planning data that is integrated into DV via custom BI template reports as detailed in the Retail Home Templates from RI section above.

The content of the tiles displayed in Retail Home for the Retail Demand Forecasting application are determined by a set of configuration resources. These resources are created as a part of the configuration of the application and allow for the same level of flexibility and configurability as the overall application.

The data values displayed within the Retail Demand Forecasting tiles in Retail Home are not pulled in real time from the live data stored within the Planning Data Store. The data is instead drawn from the same source as the data displayed in the in-app dashboard for the solution. This means that the values displayed in Retail Home will be synchronized with the values within the RDF dashboard; allowing users to launch into the solution and gain more insight into the displayed metrics. It also means that the values displayed within Retail Home will not update automatically; they will only update when the in-app RDF dashboard is refreshed.

Customers using the RDF Template application will find a set of pre-configured tiles available for their use. These tiles states associated with a tile correspond to pre-defined business roles within the RDF Template application and provide a set of metrics appropriate for that business role. The RDF template application has also been pre-configured with the measures and rules necessary to provide the information used by the template tile states to Retail Home. Information on these pre-configured tiles and their contents can be found in the Retail Home section of chapter 1 RDF Batch Task Administration of the *Oracle Retail Demand Forecasting Cloud Service Administration Guide*.

Seeding Retail Home Data

The RDF solution does not make use of the Refresh Seed data task in Application Navigator. Instead, an Administration task must be run within the application by a user with Retail Demand Forecasting application administrator privileges. The Retail Home Seeding task provides Retail Home with information about the tiles for the RDF solution as well as configuring metadata within the application to allow the solution to provide the correct application data to Retail Home.

For information about the Retail Home Seeding task, please consult the Batch Administration chapter of the Oracle Retail Predictive Application Server Cloud Service Administration Guide.

Additionally, it is required for a user to have built an application Dashboard workspace within the Retail Demand Forecasting application for that user to see information within the RDF tile of Retail Home. RDF uses the information within the Dashboard workbook to calculate and return the values requested by Retail Home. Therefore, when the RDF solution is first built, the “Schedule Dashboard Build” task must run the application for all users. The Schedule Dashboard Build task must also be run for new users when those users are registered in the application. For information on the Schedule Dashboard Build task, please consult the System Administration chapter of the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Retail Home Content for Customized Applications

The Retail Demand Forecasting application does not support non-template instances. For this reason, it does not support custom metric tile states in Retail Home. RDF does support the integration of DV reports into Retail Home. This information can be found in the Configuring Data Visualizer Expanded Reports for Retail Home section of the “Retail Predictive Application Server Cloud Edition” chapter of this guide.

Administration Tools

Resource Bundle Customization

In versions 22.x and above, the RDF solution supports the use of the Retail Home Resource Bundle Customization framework for the customization and translation of some but not all labels and messages seen within the solution. For these strings, and the administrative task is available in Retail Home to allow searching for and viewing supported strings, customizing strings, and restoring customizations to default values.

Other labels and messages seen within the product such as those based upon metadata of the application, or error messages reporting a problem performing an activity on the server such as a custom action, are managed through the in-application Translation Administration administrative task or batch uploads of translated content.

Strings supporting Resource Bundle Customization include:

- Labels for controls such as menus, buttons (but not custom actions), etc.
- Messages displayed in toast and snackbar notifications in response to user actions
- Validation messages provided within the UI

For these strings, customization of individual strings and for large numbers of strings can be achieved using the Resource Text Strings and Import Management tasks in Retail Home.

The strings used by the RDF solution are contained within the RDF Cloud Service, the RpasBundle, and the RpasMessages bundles.

Information on using the Resource Text Strings and Import Management tasks can be found in the Resource Bundles chapter of the Oracle Retail Home Administration Guide.

Strings not managed through the RBC framework include:

- Labels of dimension, measures, and positions
- View and Dimension labels

- Custom action button labels
- Messages received from the server detailing failures in submitted actions

These strings are managed internally by the app, as detailed in the Internationalization chapter of the *Oracle Retail Predictive Application Cloud Service Administration Guide*.

Email Notifications for Batch Tasks

Retail Home supports the configuration of email notifications in response to activities like the success and failure of Online Administration Tools tasks. Information on the process of setting up such notifications can be found in the Online Administration Tools chapter of the *Oracle Retail Predictive Application Cloud Service Administration Guide*.

Retail Predictive Application Server Cloud Edition 19.x and 23.x

Dashboards and Tiles for RPAS Applications

The Retail Predictive Application Server Cloud Service Edition (RPAS CE) platform provides support for Retail Home tile content. Tiles can display information to provide a picture of the performance of a user's plans and/or forecasts and metrics about the overall health of the business as a whole. The data displayed within Retail Home tiles is drawn from the same source as the data displayed in the in-app dashboard for the RPAS CE solutions; allowing users to launch into the solution and gain more insight into the displayed metrics. Additionally, the RPAS CE platform supports attaching Data Visualizer (DV) reports to tiles to allow users to launch into reports relevant to the metrics displayed.

Due to the fully customizable nature of the RPAS CE platform, the platform itself does not provide any pre-configured Retail Home tiles for use out of the box. Instead, each Template application built on top of the platform provides a template tile configuration tailored to the business processes of that application.

Customer's wishing to customize the pre-configured Template tile definitions can provide Retail Home tiles that are specific to their business needs. Customers making use of a customized application must also provide a custom Retail Home tile definition that is adapted to the RPAS CE application they are building. For either customer, the process of Retail Home tile configuration is the same; information can be found in the Customized Retail Home Tile Content for Custom Applications content section below.

Seeding Retail Home Data

The RPAS CE platform does not make use of the Refresh Seed data task in Application Navigator. Instead, an Administration task must be run within the RPAS CE application by a user with application administrator privileges. The Retail Home Seeding task provides Retail Home with information about the tiles for the RPAS CE solution as well as configuring metadata within the application to allow the solution to provide the correct application data to Retail Home.

For information about the Retail Home Seeding task, please consult the Batch Administration chapter of the Oracle Retail Predictive Application Server Cloud Service Administration Guide.

Additionally, it is required for a user to have a built an application Dashboard workspace within the desired RPAS CE application for that user to see information within the application's tile in Retail Home. RPAS CE applications use the information within the Dashboard workbook to calculate and return the values requested by Retail Home. Therefore, when the RPAS CE solution is first built, the Schedule Dashboard Build task must run the application for all users. The Schedule Dashboard Build task must also be run for new users when those users are registered in the application. For information on the Schedule Dashboard Build task, please consult the System Administration chapter of the Oracle Retail Predictive Application Server Cloud Edition Administration Guide.

Customized Retail Home Content

This section details the process for creating custom Retail Home tile content for applications running on the RPAS CE platform. It also details customizing roles in Retail Home to create sets of tiles for different users and describes how to attach Data Visualizer reports to a Retail Home tile.

Retail Home Tile Content for Customized Applications

The creation of custom Retail Home tile content is a two-part process. The first is performed within the RPAS CE application configuration and RPAS CE Dashboard configuration. This step involves creating a RPAS CE measure, rule, and Dashboard workbook metadata to allow the RPAS CE application to supply requested data to Retail Home. The second step is performed within the Retail Home settings view of the Deployment Tool and involves specifying how the information should be displayed and formatted within Retail Home.

Creation of RPAS CE Application and Dashboard Configuration

Once the desired metrics for a Retail Home tile state have been determined, several actions must be performed so that the RPAS CE application can provide data to Retail Home. Depending on the desired metrics, some or all of these steps may have already been completed (i.e., the metrics in question already exist within the RPAS CE in-application Dashboard). This document allows implementers to examine the state of the existing application and Dashboard configuration and skip steps that are not required.

First, create measure definitions for all metrics to appear within the Retail Home tile (along with any additional measures needed to calculate the values of the displayed metrics). Measures should be configured with the appropriate property values to support the format and level of the data to be displayed. Information on measure configuration can be found in Solutions chapter of the *Oracle Retail Predictive Application Server Cloud Edition Configuration Tools User Guide*.

Next, create a process to populate the measures in step 1 with data. This will involve either a batch data load or a calculation process. Additionally, rules will need to be created within the load or calculation group of the RPAS CE Dashboard workbook to load persisted data into the workbook or to calculate derived measures as part of building or refreshing the workbook. Information on specifying batch data load and calculation tasks can be found in Implementation chapter of the *Oracle Retail Predictive Application Server Cloud Edition Implementation Guide* and Batch Administration chapter of the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*. Information on the creation of rules within the application configuration can be found in Solutions chapter of the *Oracle Retail Predictive Application Server Cloud Edition Configuration Tools User Guide*.

Next, perform configuration in the RPAS CE Dashboard workbook to add the desired metrics to the dashboard view. Only measures present in the view used to supply data to the RPAS CE Dashboard are able to supply data to Retail Home. This does imply that measures that are unsuitable for use in the Dashboard (due to non-conforming intersections or other irregularities) are not candidates for inclusion in Retail Home tiles. Information on using the Workbook Definition screen can be found in Solutions chapter of the *Oracle Retail Predictive Application Server Cloud Edition Configuration Tools User Guide*. General information about the process of configuration in regard to

the Dashboard can be found in Configuring Dashboards chapter in RPAS CE of the *Oracle Retail Predictive Application Server Configuration Tools User Guide*.

Please note that the last reference also describes configuring RPAS CE Dashboard tiles to display metrics within the RPAS CE Dashboard. Although the metrics desired in Retail Home may also provide value within the RPAS CE Dashboard, it is not a requirement to display them there and that part of the process outlined in the Configuring Dashboards in RPAS CE chapter may be omitted if the metrics are only meant to be displayed in Retail Home.

Once the above steps have been performed (or once it has been determined that the steps had already been performed to display the data in an RPAS CE Dashboard tile), the metric data desired in Retail Home is present in the RPAS CE Dashboard workbook.

Creation of Retail Home Settings Content

As the second process step, a Retail Home Configuration Resource file defines the presentation layer configuration that determines how that information is made available in the form of tiles.

Configuration of Retail Home tile settings information is performed within the RetailHomeConfig.json view of the RPAS CE Deployment Tool. Implementers can either create a new configuration (if beginning a custom configuration from scratch) or open an existing configuration (when modifying an existing configuration). Within this view, implementers can create a set of tile definitions, each definition corresponding to a single tile state that can appear in the Retail Home tile for the application.

The first choice when creating a new tile definition is the selection of the tile type. Retail Home supports several layouts for data in a tile; not all types are automatically supported for use with RPAS CE applications.

Depending on the tile layout selected, the implementer will need to supply information about the elements of that layout, specifying which metrics appear in which locations along with formatting information for the metric (the measures displayed in Retail Home support different format options than those supported in the display within the RPAS CE UI). Additionally, tile types that contain charts require specification of information to format the chart (e.g. axis labels, chart type, etc.).

Once the required information is configured for all desired tiles, a configuration file containing the information is saved from within the tool as a JSON file. The Deployment Tool also provides a Resource Bundle Customization (Resource Translation) option to create a properties file containing the keys to support the translation of the various labels within the Retail Home tile for internationalization.

Detailed information on the tile configuration process can be found in the Retail Home Dashboard Settings section of the Deployment Tool chapter of the *Oracle Retail Predictive Application Server Cloud Edition Configuration Tools User Guide*.

Finally, to use the configuration and/or resource file (created in the step above, it is necessary to upload the resources to the cloud environment and run the Retail Home Seeding Administrative task, as detailed in the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide Retail Home Seeding* section. Please note that RPAS-based applications do not make use of the Retail Home Seeding task within Retail Home application described in the Overview of this document; the task described here is to be used instead.

Customizing Roles and Tiles available to Roles in Retail Home

RPAS applications are provisioned with a set of standard business roles that represent personae in the business process of the application such as Planner or Manager. The Template application Retail Home configurations for an RPAS application assign the various pre-configured tile states to one or more of the default roles so that individual users will have access to those tile reports that correspond to their roles as defined in OCI IAM.

Implementers of customized applications will need to perform the same mapping of tiles to OCI IAM roles as part of the customer Retail Home configuration process. This is done through the specification of the Roles property for a tile definition as described in the Retail Home Dashboard Settings section of the Deployment Tool chapter of the *Oracle Retail Predictive Application Server Configuration Tools User Guide*.

It is also possible to manage roles and tile assignments within Retail Home after the initial seeding of Retail Home configuration content. Retail Home administrative users can create dashboards for additional roles created within OCI IAM and add and remove tiles and tile states from the set available to users of a given role. Information on the process of assigning tiles to OCI IAM roles can be found in the Application Navigator Setup chapter of the *Oracle Retail Home Administration Guide*. Information on managing roles within OCI IAM can be found <find proper link for IAM documentation>.

Configuring Data Visualizer Expanded Reports for Retail Home

Retail Home supports integration with Data Visualizer (DV) with the tiles of a Retail Home dashboard. A report created and maintained within Data Visualizer can be added as an expanded report to the tile for an RPAS CE based application. This process cannot be performed as a part of the application configuration detailed above. Instead, it must be performed by a Retail Home administrative user within Retail Home after the RPAS application is built and metrics detailed in DV, DV reports created with a BI metric template, and Retail Home Custom Reports and Dashboard tile defined to align to the DV reports.

Information on the steps involved in creating Data Visualizer reports is out of scope for this document but can be found in the Oracle documentation library for Oracle Analytics. Information on how to attach an existing Data Visualizer report to a Retail Home tile as an expanded report can be found in the Custom Tile State Reports Configuration chapter of the *Oracle Retail Home Administration Guide*.

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Retail Data Store 23.x

This section outlines how the Retail Data Store (RDS) supports Retail Home features.

Application Navigator Links

Links to Data Visualization, XML Publisher, and the APEX/ORDS UI are pre-configured in Retail Home. Custom APEX apps can also be launched from Retail Home. Please refer to *Oracle Retail Data Store Implementation Guide* for more information.

Notifications

The Retail Data Store has no pre-configured notifications. Users can create notifications to support custom RDS solutions

Favorites

Retail Data store has no services that support Favorites.

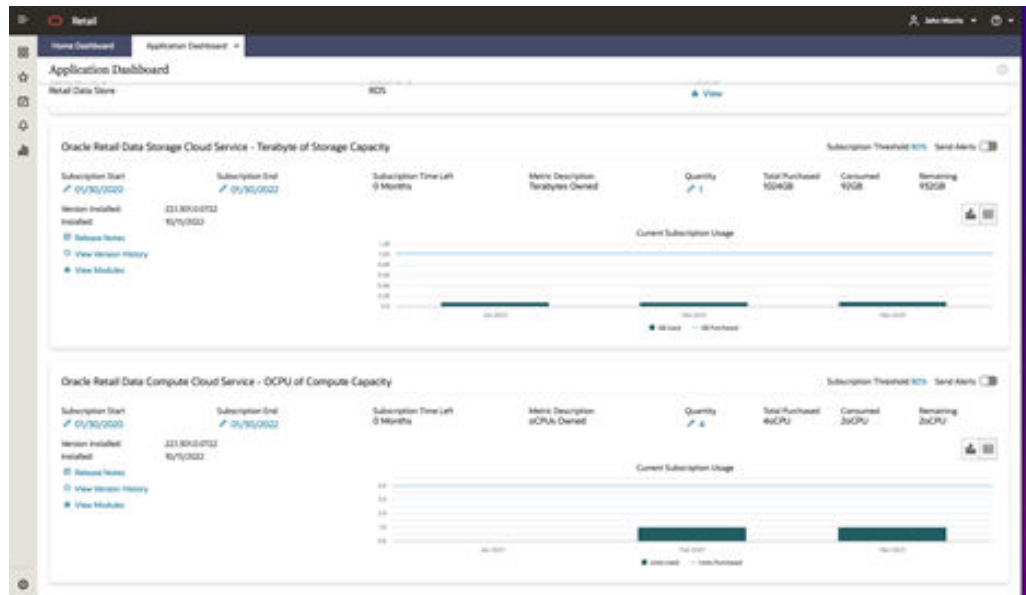
Pre-Configured Dashboard and Tiles

Retail Data Store has no pre-configured Dashboards or Tiles. Customers, however, can create custom services to drive metric tiles. Please refer to *Oracle Retail Data Store Implementation Guide* for more information.

Subscription Metric Report

Retail Data Store is pre-configured to provide subscription usage metrics on Retail Home to the administrator. This report provides visibility to storage and OCPU capacity usage.

This report is visible by navigating to Settings -> Application Administration -> Application Dashboard. Additional details for using the subscription metrics report, such as inputting or editing the subscription start/end dates and the subscription quantity, can be found in the *Retail Home Administration Guide*.



Resource Bundle Customization

Retail Data Store has no Resource Bundles.

Customer Module Management

Retail Data Store has no customer managed modules.