

# Oracle® Retail Home Administration Guide



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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

ORACLE®

Oracle Retail Home Administration Guide, Release 23.1.301.0

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Oracle Retail Home Administration Guide, Release 22.1.202.1

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# Preface

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

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

## Audience

This guide is for:

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

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## Related Documents

For more information, see the following documents in the Oracle Retail Home Release 22.1.202.1 documentation set:

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

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

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

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

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

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

## Conventions

The following text conventions are used in this document:

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

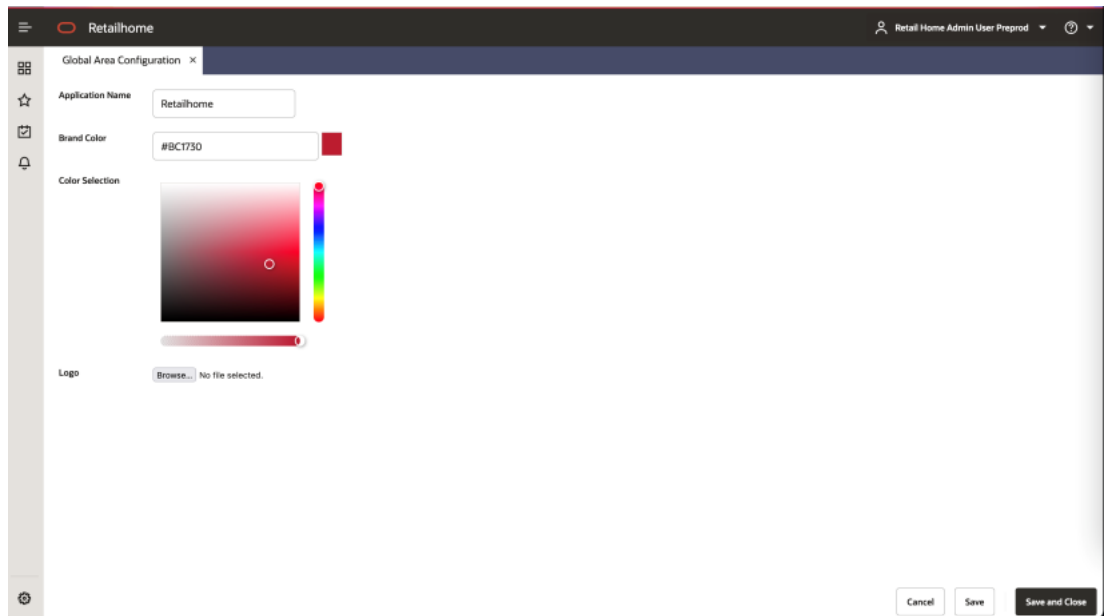
---

# 1

## Global Area Configuration

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

**Figure 1-1 Global Area Configuration**



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

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

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

### Note:

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

# 2

## Application Navigator Setup

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

Figure 2-1 Application Navigator Setup Page

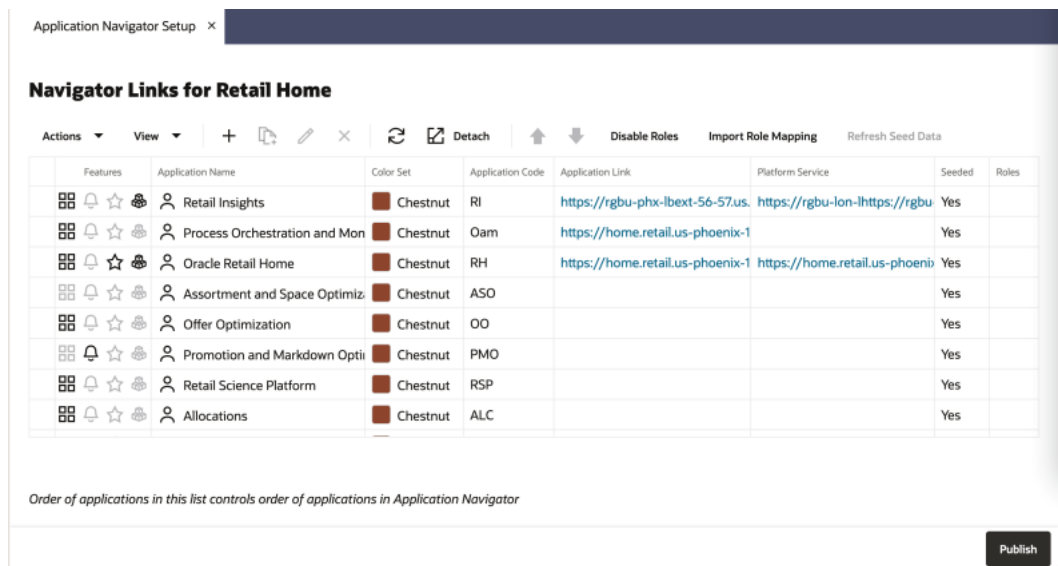


Figure 2-2 Application Navigator

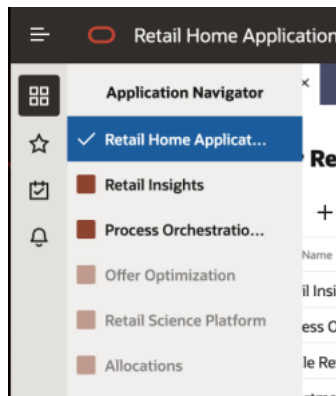
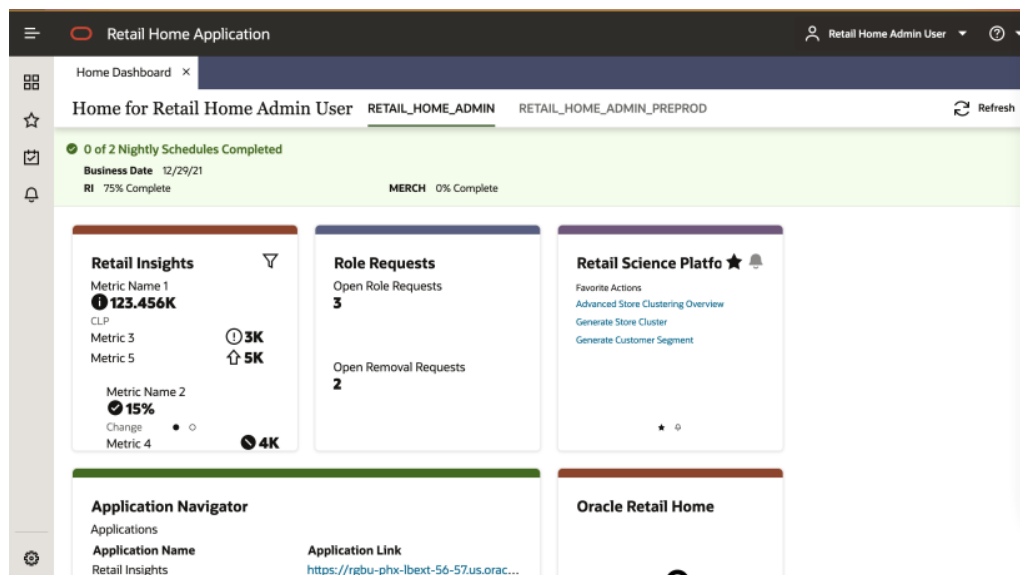


Figure 2-3 Retail Home Dashboard



## System Generated Application Navigator Entries

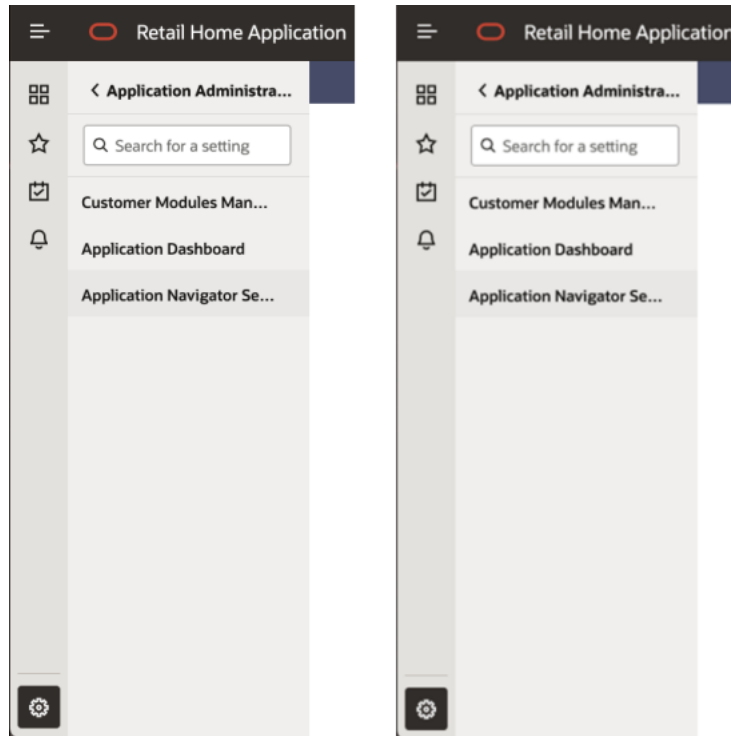
Retail Home creates an initial set of application entries for known Retail Applications upon initial installation or upgrade to current version. These entries only contain the name and application code for applications and are initially disabled. On upgrade, the oldest entry for each known application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

## Launching the Application Navigator Setup Page

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



**Figure 2-4 Application Navigator Setup Link in Settings**



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

**Figure 2-5 Application Navigator Setup Page**

Application Navigator Setup ×

### Navigator Links for Retail Home

Actions View + Detach Disable Roles Import Role Mapping Refresh Seed Data

Features	Application Name	Color Set	Application Code	Application Link	Platform Service	Seeded	Roles
	Retail Insights	Chestnut	RI	<a href="https://rgbu-phx-lbext-56-57.us">https://rgbu-phx-lbext-56-57.us</a>	<a href="https://rgbu-lon-lhttps://rgbu">https://rgbu-lon-lhttps://rgbu</a>	Yes	
	Process Orchestration and Mon	Chestnut	Oam	<a href="https://home.retail.us-phoenix-1">https://home.retail.us-phoenix-1</a>		Yes	
	Oracle Retail Home	Chestnut	RH	<a href="https://home.retail.us-phoenix-1">https://home.retail.us-phoenix-1</a>	<a href="https://home.retail.us-phoenib">https://home.retail.us-phoenib</a>	Yes	
	Assortment and Space Optimiz.	Chestnut	ASO			Yes	
	Offer Optimization	Chestnut	OO			Yes	
	Promotion and Markdown Opti	Chestnut	PMO			Yes	
	Retail Science Platform	Chestnut	RSP			Yes	
	Allocations	Chestnut	ALC			Yes	

*Order of applications in this list controls order of applications in Application Navigator*

Publish

The following information is shown for each application:

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

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



## Adding an Application Navigator Entry

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

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

- **Seeded** - Shows whether the application is a seeded application or not.
- **Application Navigator Switch** - Controls whether the application will be displayed in the Retail Home Application Navigator menu.
- **Application Name** - A unique name for the application that will be displayed in the Application Navigator menus and in the Retail Home Dashboard Tile header.
- **Color Set** - The color scheme used to display this application in the Retail Home Application Navigator menu and for the background of the Retail Home Dashboard Tile.
- **Application Code** - The unique code associated with a Retail Application. This is required to support features such as Favorites, Notifications and Resource Bundle Customization.
- **Application Link** - The URL used to launch the application from Application Navigator menus or from the header of a dashboard tile.
- **Platform Service Switch** - Controls the display of options under platform services (URL & sup-ported features).

- **Platform Service URL** - The URL used to access Platform ReST Services. This is required to support features such as Favorites, Notifications and Resource Bundle Customization.
- **Platform Service Supported Features** - Check boxes to determine whether Notifications, Favorites & Resource Bundle Customization is available for the application.

Figure 2-6 Add Application Info Dialog


The screenshot shows a dialog box titled "Add Application Info". It contains the following elements:

- Seeded:** A text input field containing the value "No".
- Application Navigator:** A toggle switch that is currently turned on (green).
- Application Name:** A text input field with a "Required" label below it.
- Color Set:** A dropdown menu currently set to "Chestnut".
- Application Code:** A dropdown menu.
- Application Link:** A text input field with a warning triangle icon below it.
- Platform Service:** A toggle switch that is currently turned off (grey).
- Buttons:** Three buttons at the bottom: "OK and Create Another", "Cancel", and "OK".

## Saving the New Application Navigator Entry

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

## Duplicating an Application Navigator Entry


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

Users can modify the details in the "Add Application Info" dialog. See the section above titled [Adding an Application Navigator Entry](#) for details about adding a new application navigator entry.

### Note:

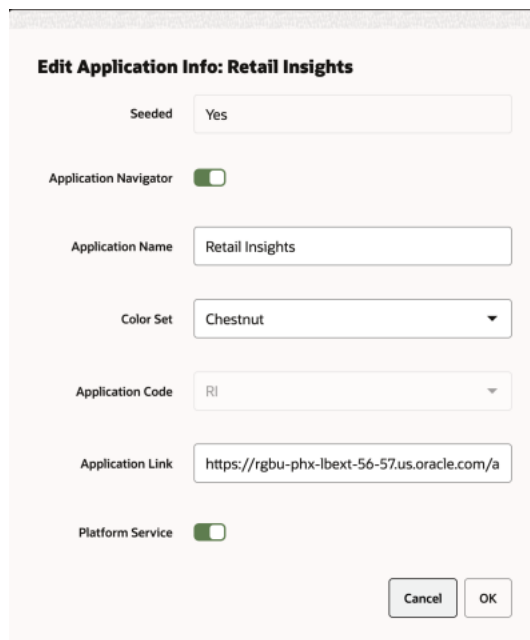
It is allowed to duplicate from an existing seeded entry, but the new application navigator entry will not be considered a seeded entry.

## Editing an Application Navigator Entry

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

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

**Figure 2-7 Edit Application Info Dialog**



**Edit Application Info: Retail Insights**

Seeded Yes

Application Navigator

Application Name Retail Insights

Color Set Chestnut


Application Code RI

Application Link <https://rgbu-phx-lbext-56-57.us.oracle.com/a>

Platform Service

Cancel OK

## Deleting an Application Navigator Entry

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





**Note:**

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

## Reordering Application Navigator Entries

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

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

## Managing Roles

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

## Enabling Roles

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

## Mapping Roles to Applications

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

## Importing a Role Mapping

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

## Seeding Data from Applications

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

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

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

For full details on the behavior of importing seed data, refer to [Seeding Application Dashboards](#).

## Publishing Application Navigator Entries

Application navigator entries can be published to the applications through their PSRAF URLs. These applications are represented by the system-generated application navigator entries. Data that is published includes the details of each application including links and role

mappings. Only applications that have an application link will be published. Use the **Publish** button located in the page footer to publish this data.

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

 **Note:**

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

# 3

## OAuth Application Configuration

Retail Home allows you to create new OAuth client applications in IDCS or OCI IAM for authentication, as well as manage existing client applications. Managing applications is limited to client applications created through Retail Home.

A Retail Home administrator can access the Manage OAuth Clients from the Application Administration section of the settings menu.

Users can switch between showing clients created with Retail Home and all clients in IDCS. When viewing all OAuth clients, clients that were not created with Retail Home cannot be modified and will be marked as locked.

The screenshot shows the 'Manage OAuth Clients' page. At the top, there are tabs for 'Home Dashboard' and 'Manage OAuth Clients'. Below the tabs, the section is titled 'IDCS OAuth Clients'. There are two tabs: 'All Clients' (selected) and 'Editable Clients'. Below the tabs is a toolbar with 'Actions', 'View', and several icons: a plus sign, a pencil, a cross, a refresh, a detach icon, and a 'Regenerate' button. The main content is a table with two columns: 'App Name' and 'Description'. Each row in the table has a 'Locked' status indicator in the 'App Name' column.

App Name	Description
OAUTH_CLIENT_18_1	OAUTH_CLIENT_18_1
OAUTH_CLIENT_18_2	OAUTH_CLIENT_18_2
OAUTH_CLIENT_18_3	OAUTH_CLIENT_18_3
OAUTH_CLIENT_18_4	OAUTH_CLIENT_18_4
OAUTH_CLIENT_18_5	OAUTH_CLIENT_18_5
OAUTH_CLIENT_18_8	OAUTH_CLIENT_18_8
OAUTH_CLIENT_18_99	OAUTH_CLIENT_18_99
OAUTH_CLIENT_2021	OAUTH_CLIENT_2021

### Creating OAuth Client Applications

To create a new OAuth client application, select **Add** from the action menu or the add button on the toolbar.

**Create IDCS OAuth 2.0 Client**

⚠ Client ID and Client Secret will be displayed once  
Submitting this form will provide you with a Client ID and Client Secret which will be displayed one time only

Assign Template

App Name  Required

Description  Required

Scope 1  X

+ Add Scope

Cancel OK

This dialog takes the following values:

- The **App Name** is 2-100 characters and will be used as the name in IDCS or OCI IAM.
- **Description** is a detailed description of the application.
- **Scope** allows multiple scopes to be defined on the client. These scopes must already exist in IDCS or OCI IAM and should be provided as fully qualified scopes (FQS), such as "rgbu:rh:service".

When the application is created, another dialog will open to show the client ID and client secret of the new application. These values should be copied down to a safe location, as they will only be shown once. *Retail Home cannot retrieve the credentials again after the dialog is closed.*

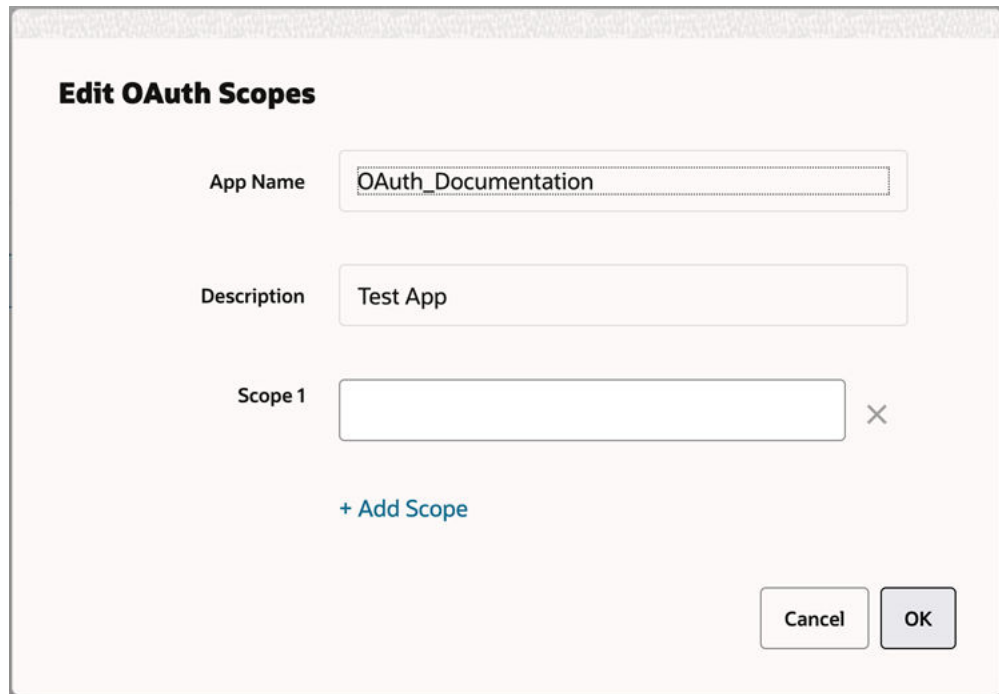
## Templates

Retail Home supports the use of templates to automatically fill in fields in the create dialog. To make use of a template, activate the **Assign Template** switch and select the desired template from the **Template** menu.



## Editing OAuth Client Applications

To modify an existing OAuth client, select it in the main list and select **Edit** from the menu or the edit button on the toolbar. When viewing all OAuth clients, clients marked as Locked cannot be modified from Retail Home.

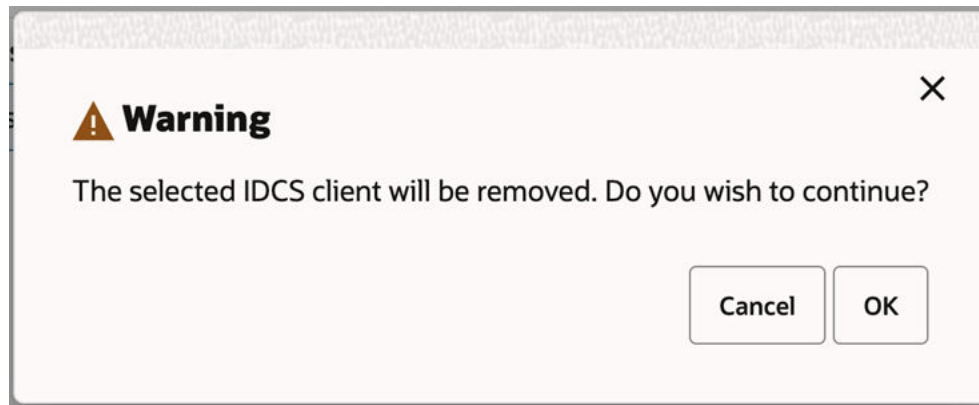


The screenshot shows a dialog box titled "Edit OAuth Scopes". It contains three input fields: "App Name" with the value "OAuth\_Documentation", "Description" with the value "Test App", and "Scope 1" which is currently empty. Below the "Scope 1" field is a blue link "+ Add Scope". At the bottom right of the dialog are "Cancel" and "OK" buttons.

Editing an existing client application allows updating the scopes associated with it, but does not allow the name or description to be changed.

## Deleting OAuth Client Applications

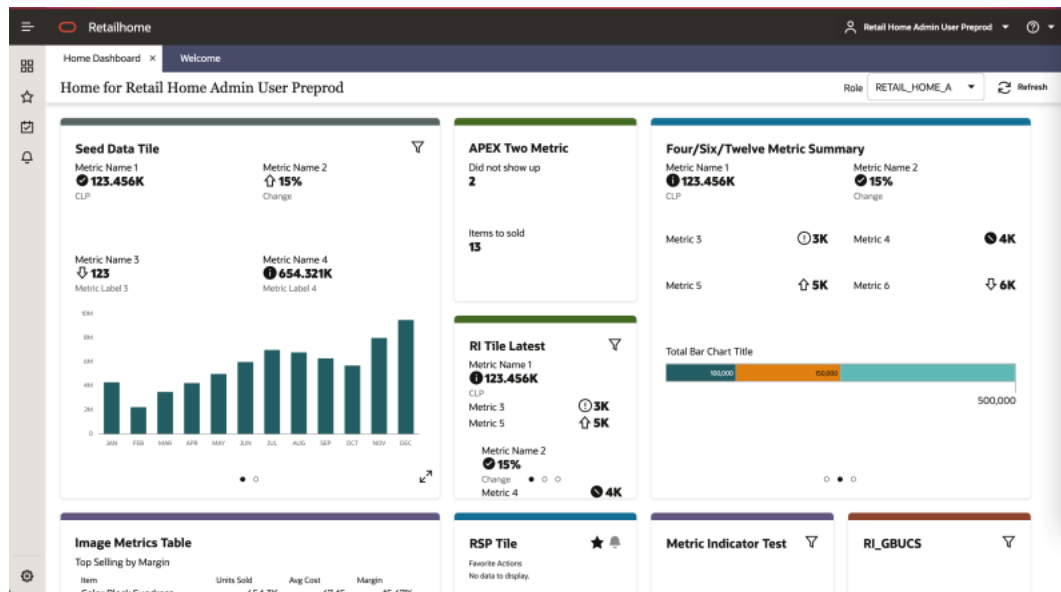
To delete an OAuth client, select it in the main list and select **Delete** from the menu or the delete button on the toolbar. When viewing all OAuth clients, clients marked as Locked cannot be deleted from Retail Home.



# 4

## Dashboard Configuration

Retail Home is a portal-type application for the RGPU enterprise. The UI consists of a tile-based configurable dashboard that highlights important metrics and KPIs across RGPU applications. A Retail Home administrator configures persona-based dashboards for each enterprise role through the Dashboard Configuration flow.



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

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

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

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

## Tile Configuration

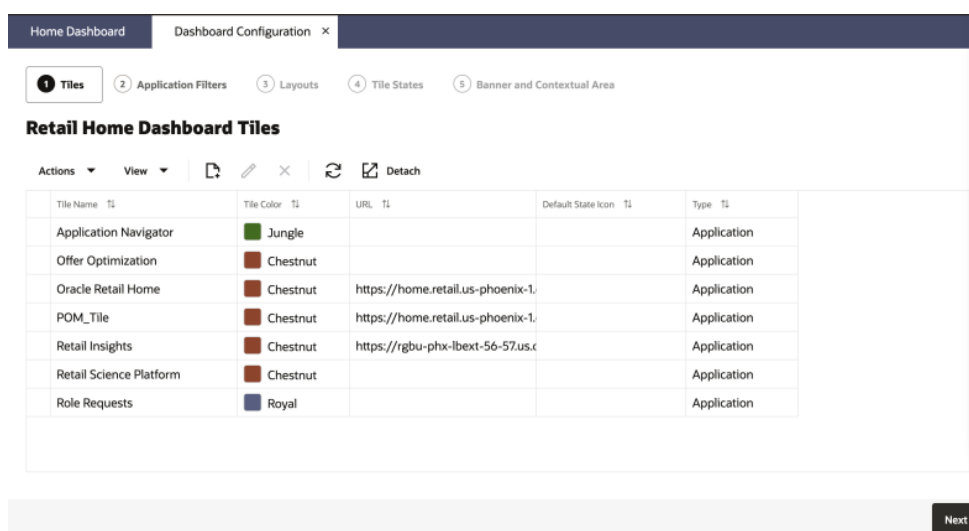
In Retail Home, an administrative user defines dashboards for enterprise roles. Users will see the dashboards configured for their enterprise role(s) when they log in to Retail Home. This section describes how to create dashboard tiles, the first step in the Dashboard Configuration flow.

### Adding a Tile

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

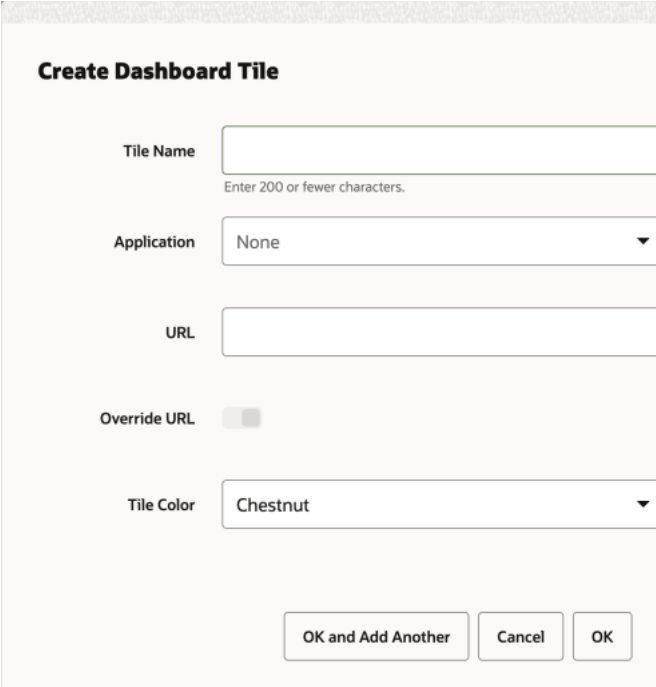
1. In the Dashboard Configuration flow, select the **Tiles** tab if it is not already selected.

**Figure 4-1** Creating Dashboard Tiles



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

Figure 4-2 Create Tile



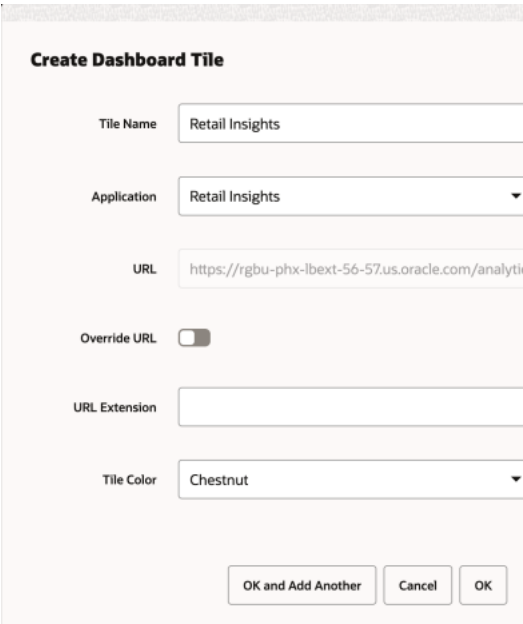
The screenshot shows a form titled "Create Dashboard Tile" with the following fields and controls:

- Tile Name:** A text input field with a placeholder "Enter 200 or fewer characters."
- Application:** A dropdown menu currently showing "None".
- URL:** A text input field.
- Override URL:** A toggle switch currently in the "off" position.
- Tile Color:** A dropdown menu currently showing "Chestnut".

At the bottom of the form are three buttons: "OK and Add Another", "Cancel", and "OK".

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

Figure 4-3 URL Extension &amp; Override URL Switch



The screenshot shows the same "Create Dashboard Tile" form, but with the following fields populated:

- Tile Name:** "Retail Insights"
- Application:** "Retail Insights" (selected from the dropdown)
- URL:** "https://rgbu-phx-lbext-56-57.us.oracle.com/analytic"
- Override URL:** The toggle switch is now in the "on" position.
- URL Extension:** An empty text input field.
- Tile Color:** "Chestnut" (selected from the dropdown)

The buttons "OK and Add Another", "Cancel", and "OK" remain at the bottom.

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

## Editing a Tile

1. In the **Tile** tab, select a row containing tile information. This will make the **Edit** icon clickable.
2. Click the **Edit** icon to open the Edit Tile Dialog Box. Make edits in the dialog box as shown in [Figure 4-4](#). Click **OK** to save the edits. Click **Cancel** to not save the edits.

**Figure 4-4** Edit Tile

**Edit Dashboard Tile**

Tile Name: Retail Insights  
Enter 200 or fewer characters.

Application: Retail Insights

URL: https://rgbu-phx-lbext-56-57.us.oracle.com/analytic

Override URL:

URL Extension:

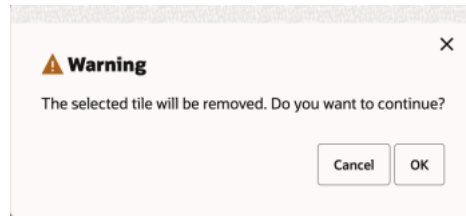
Tile Color: Chestnut

Cancel OK

## Deleting a Tile

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

Figure 4-5 Delete Tile



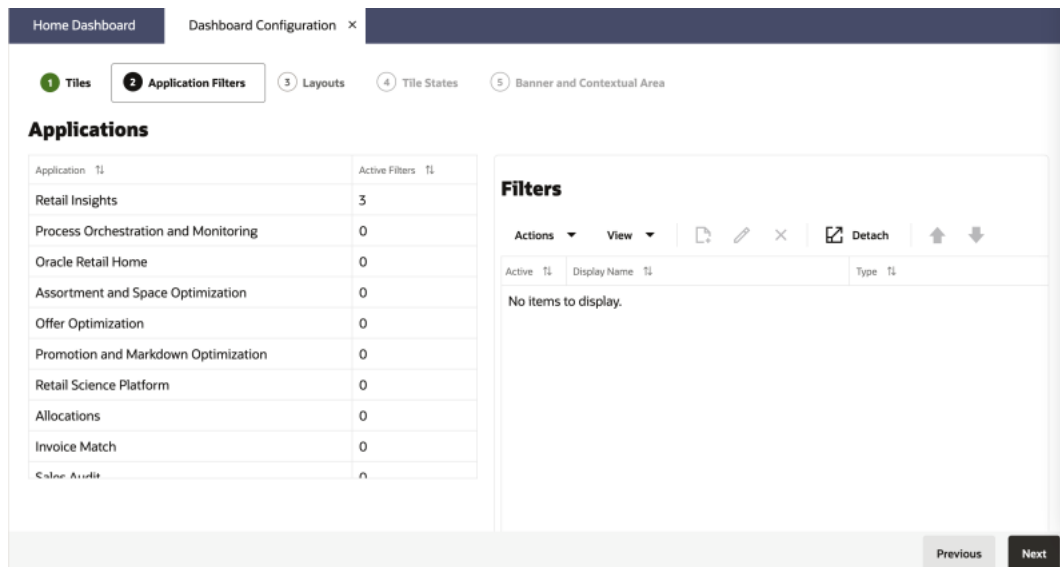
## Filter Configuration


Retail Home supports the creation of filters for dashboard tiles. Filter options can be configured on a per-application basis and can be retrieved from a REST endpoint or BI analysis. Filter options can also be manually defined in the UI.

### Adding a Filter

To add a new filter for an application, complete the following steps:

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



2. Select the application to add a filter for from the list of applications on the left.
3. Select the add button  on the list of filters to the right.

**Create Filter for Oracle Retail Home**

Active

Display Name  Required

Parameter  Required



Type  ▼

Selection Options  From Datasource  Enter Manually

4. Toggle the **Active** switch to turn on the filter.
5. Enter a **Display Name** and the **Parameter** the filter applies to. The parameter is the actual string sent to the tile state's data source.
6. Select the **Type** of filter to add. The supported filter types are radio buttons, toggles, multi-select inputs, checkboxes, and numeric inputs.
7. Define the filter options for the filter. They can be set to load from a data source (either BI or REST service) or be manually entered.

Filters must be enabled on a tile before they will appear in the UI. See the later section on configuring tiles for details.

## Editing or Removing a Filter

An existing filter can be edited by selecting it and selecting the edit button  to open the dialog again. Filters can be removed by selecting the remove button  and confirming.

## Configuring Filter Options

Filter options can be manually input or configured to load from a BI or REST data source.

## Manual Configuration

To manually enter filter options, select **Enter Manually** in the dialog.



The screenshot shows a web form titled "Create Filter for Retail Insights". At the top, there is an "Active" toggle switch. Below it are two required text input fields: "Display Name" and "Parameter". The "Type" is set to "Select Menu" in a dropdown menu. Under "Selection Options", the "Enter Manually" radio button is selected. Below this is a table with two columns: "Display Name" and "Submitted Value". The table currently contains one empty row. To the left of the table is a three-dot menu icon, and to the right is a vertical three-dot menu icon. Below the table is a button labeled "+ Add Filter Selection Option". At the bottom of the form are three buttons: "OK and Add Another", "Cancel", and "OK".

The first column is the label to display to the user and the second column is the string that will be submitted to the tile state's data source. Additional rows can be added with the button at the bottom. The controls on the left and right offer options for rearranging the list and removing rows.

To localize the display names, open the edit dialog in a browser using a different locale. Any changes to the display name column will only apply for the locale you are currently in.

## Data Sources

Selecting the data source option presents a second choice of which type of data source to use. Service endpoint allows calling a REST service, BI allows returning results from a BI analysis.

Service endpoints must accept GET requests according to the following API:

### Query Parameters

There are two optional query parameters that may be sent in requests from Retail Home:

- **nameSearch** - This is used for single/multi-select filters and provides user search input for options in the result.
- **pageSize** - The maximum number of results to return.

### Response Payload

The server must respond with a JSON object containing an array under `options`. Each entry in the `options` array has the following fields:

Property	Type	Required	Description
value	String	Y	The internal value of the option that will be processed by the filter.
name	String	Y	The name of the option to be displayed to the user. This value can be localized before returning the response.

A BI analysis can also return filter options. Enter the catalog path to the corresponding analysis in the BI instance Retail Home is integrated with. The BI analysis should accept a `NameSearch` parameter and return two columns for the value and display name respectively.

Data sources are expected to provide their own localization.

## Layout Configuration

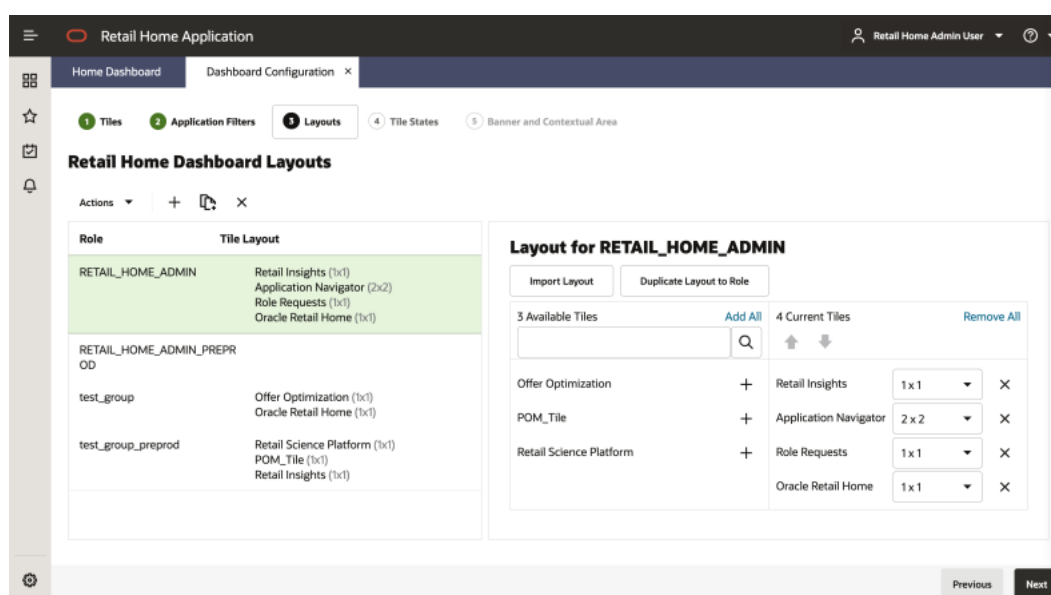
In Retail Home, an administrative user defines dashboards for enterprise roles. Users will see the dashboards configured for their enterprise role(s) when they log in to Retail Home. This section describes how to associate enterprise roles with application tiles.

### Adding a Role

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

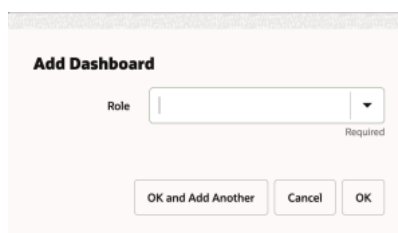
1. In the Dashboard Configuration flow, select the **Layouts** tab if it is not already selected.

**Figure 4-6 Mapping Table for Role and Application Tiles**



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

**Figure 4-7 Add Role**



3. Enter text in the **Role Name** text box to search for a specific role. If the result includes more than one role, select the appropriate one.
4. Click **OK** to save your changes and close the dialog box. Click **OK and Add Another** to save your changes and to add additional roles. Click **Cancel** to close the dialog box without saving your changes.

## Duplicating a Role Configuration

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

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

**Figure 4-8 Mapping Table for Role and Application Tiles**

The screenshot shows the 'Retail Home Dashboard Layouts' configuration page. It features a table with columns for 'Role' and 'Tile Layout'. The 'Layout for RETAIL\_HOME\_ADMIN' is expanded, showing a list of available tiles and current tiles. The available tiles include Offer Optimization, POM\_Tile, and Retail Science Platform. The current tiles include Retail Insights, Application Navigator, Role Requests, and Oracle Retail Home.

Role	Tile Layout
RETAIL_HOME_ADMIN	Retail Insights (1x1) Application Navigator (2x2) Role Requests (1x1) Oracle Retail Home (1x1)
RETAIL_HOME_ADMIN_PREPRODUCTION	
test_group	Offer Optimization (1x1) Oracle Retail Home (1x1)
test_group_preprod	Retail Science Platform (1x1) POM_Tile (1x1) Retail Insights (1x1)

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

**Figure 4-9 Duplicate Role Configuration**

The dialog box is titled 'Duplicate Dashboard Layout'. It contains a 'From Dashboard' field with the value 'RETAIL\_HOME\_ADMIN'. Below it is a 'To Role' field with a dropdown arrow and a 'Required' label. At the bottom, there are three buttons: 'OK and Duplicate Another', 'Cancel', and 'OK'.

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

## Adding/Editing Tile Layout to a Role

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

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

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

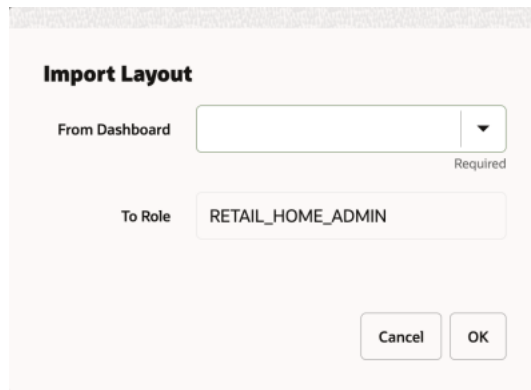
**Figure 4-10 Mapping Table for Role and Application Tiles**

Role	Tile Layout
RETAIL_HOME_ADMIN	Retail Insights (1x1) Application Navigator (2x2) Role Requests (1x1) Oracle Retail Home (1x1)
RETAIL_HOME_ADMIN_PREPRODUCTION	
test_group	Offer Optimization (1x1) Oracle Retail Home (1x1)
test_group_preprod	Retail Science Platform (1x1) POM_Tile (1x1) Retail Insights (1x1)

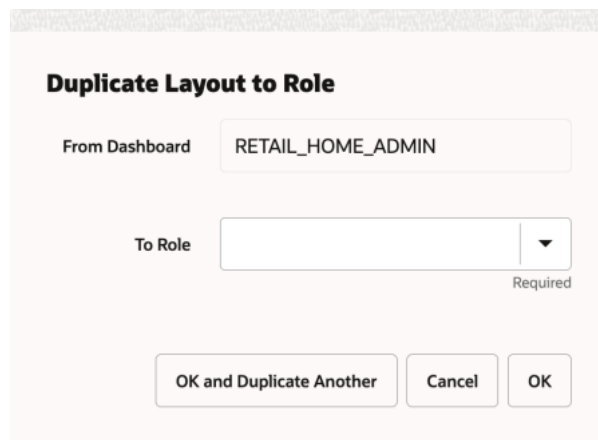
Layout for RETAIL_HOME_ADMIN	
3 Available Tiles	4 Current Tiles
Offer Optimization	Retail Insights (1 x 1)
POM_Tile	Application Navigator (2 x 2)
Retail Science Platform	Role Requests (1 x 1)
	Oracle Retail Home (1 x 1)

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

**Figure 4-11 Import Layout Dialog Box**

The dialog box is titled "Import Layout". It contains two input fields: "From Dashboard" which is a dropdown menu with a downward arrow and a "Required" label below it, and "To Role" which is a text box containing the value "RETAIL\_HOME\_ADMIN". At the bottom right, there are two buttons: "Cancel" and "OK".

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

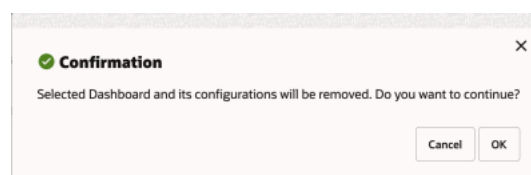
**Figure 4-12 Duplicate Layout to Role Dialog Box**

The dialog box is titled "Duplicate Layout to Role". It contains two input fields: "From Dashboard" which is a text box containing the value "RETAIL\_HOME\_ADMIN", and "To Role" which is a dropdown menu with a downward arrow and a "Required" label below it. At the bottom, there are three buttons: "OK and Duplicate Another", "Cancel", and "OK".

## Deleting a Role

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

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

**Figure 4-13 Delete Role Confirmation**

The dialog box is titled "Confirmation" with a green checkmark icon. It contains the text: "Selected Dashboard and its configurations will be removed. Do you want to continue?". At the bottom right, there are two buttons: "Cancel" and "OK".

## Tile States

Retail Home displays application tiles within the dashboard. You can configure application tile states and the data sources used for the metrics displayed in the tiles.

Figure 4-14 shows the Data configuration tab of the Dashboard configuration flow.

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

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

The following fields are configurable for Tile States:

- **Displayed** - A check box that toggles between two states, displayed and not displayed.
- **Tile State Report** - This field is mandatory and is used to indicate the report that is displayed in the tile state.
- **Expanded Report** - This field is optional and is used to indicate which expanded tile report can be launched from this tile state.

The following fields are configurable for Data Sources:

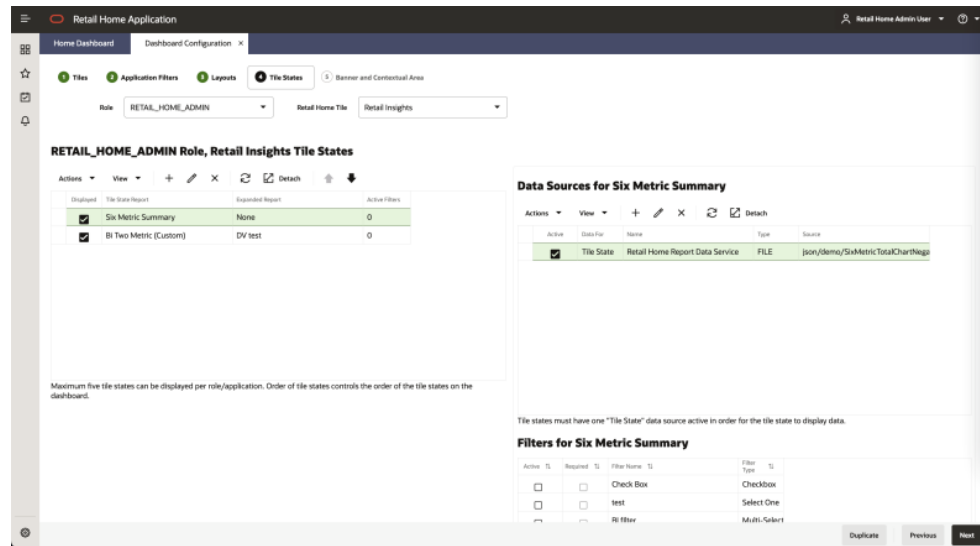
- **Data For** - The report type that the data source is for, either Tile State or Expanded Report.
- **Active** - A check box that toggles between two states, active and inactive. Only one data source for a report type can be active at a time.
- **Name** - The name of the data source.
- **Type** - The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

## Adding a Tile State

To add a tile state, complete the following steps:

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

**Figure 4-14 Tile Configuration for RETAIL\_HOME\_ADMIN Role and Retail Insights Application**

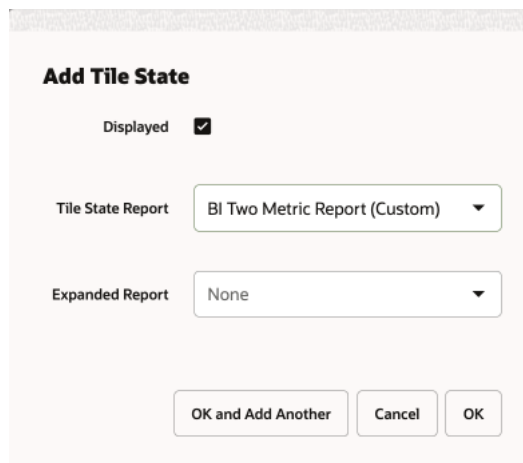


2. Select a combination of role and Retail Home Tile from the drop-down list.
3. Click the **Add** icon in the Tile States table toolbar. The Add Tile State dialog box is displayed.

 **Note:**

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

**Figure 4-15 Add Tile State**



4. Toggle the **Displayed** check box to control whether the tile state displays in the tile or not.
5. Select the desired **Tile State Report** from the drop-down list.

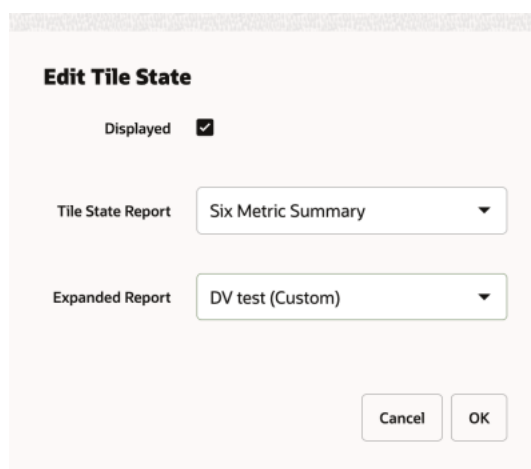


6. Optionally, select the desired **Expanded Report** from the drop-down list.
7. Click **OK** to save your changes and close the dialog box. Click **OK and Add Another** to save your changes and add another tile state. Click **Cancel** to close the dialog box without saving your changes.

## Editing a Tile State

To edit a tile state, select the tile state in the table, click the **Edit** icon in the table toolbar, and make edits in the dialog, as shown in [Figure 4-16](#). Click **OK** to save the edits. Click **Cancel** to not save the edits.

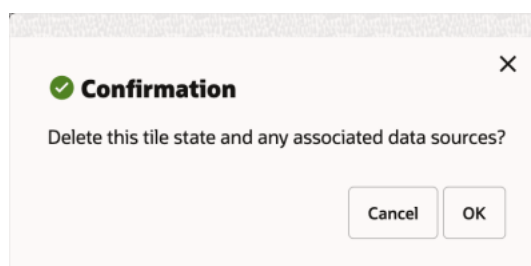
**Figure 4-16** Edit Tile State



## Deleting a Tile State

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

**Figure 4-17** Delete Tile State



## Moving a Tile State

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

 **Note:**

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

**Figure 4-18 Move Tile State**

**RETAIL\_HOME\_ADMIN Role, Retail Insights Tile States**

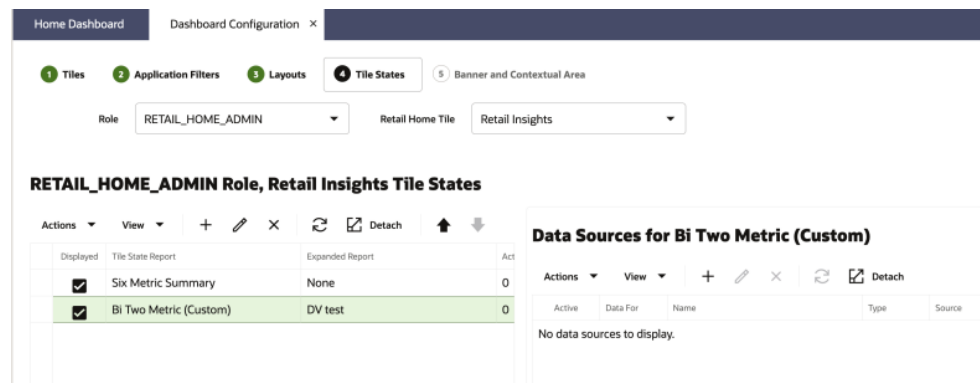
Displayed	Tile State Report	Expanded Report	Act
<input checked="" type="checkbox"/>	Six Metric Summary	None	0
<input checked="" type="checkbox"/>	Bi Two Metric (Custom)	DV test	0

## Adding a Data Source

To add a data source, complete the following steps:

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

**Figure 4-19 Adding Data Source**



**RETAIL\_HOME\_ADMIN Role, Retail Insights Tile States**

Displayed	Tile State Report	Expanded Report	Act
<input checked="" type="checkbox"/>	Six Metric Summary	None	0
<input checked="" type="checkbox"/>	Bi Two Metric (Custom)	DV test	0

**Data Sources for Bi Two Metric (Custom)**

Active	Data For	Name	Type	Source
No data sources to display.				

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

Figure 4-20 Add Data Source

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

 **Note:**

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

Figure 4-21 Change Active Data Source

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

 **Note:**

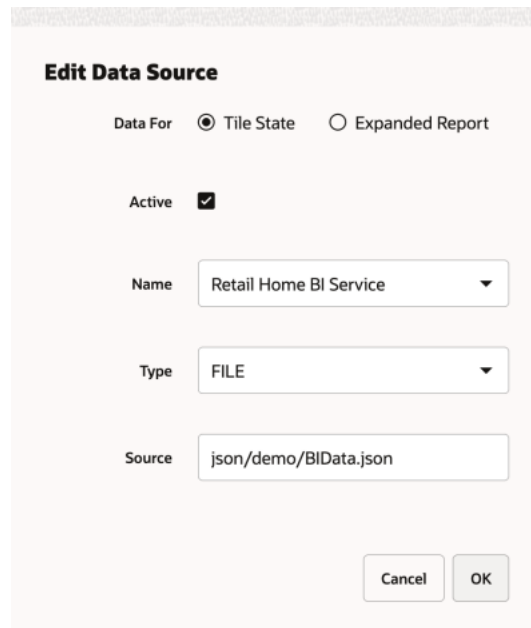
The URL will be validated and you will receive an error message if the URL is not valid.

10. Click **OK** to save your changes and close the dialog box. Click **OK and Add Another** to save your changes and add another data source. Click **Cancel** to close the dialog box without saving your changes.

## Editing a Data Source

To edit a data source, select the data source in the table, click the **Edit** icon in the table, and edit the values in the Edit Data Source dialog, as shown in [Figure 4-22](#). Click **OK** to save the edits. Click **Cancel** to not save the edits.

**Figure 4-22** Edit Data Source



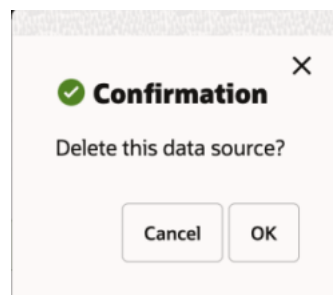
The screenshot shows a dialog box titled "Edit Data Source". It contains the following fields and controls:

- Data For:** Two radio buttons, "Tile State" (selected) and "Expanded Report".
- Active:** A checked checkbox.
- Name:** A dropdown menu with "Retail Home BI Service" selected.
- Type:** A dropdown menu with "FILE" selected.
- Source:** A text input field containing "json/demo/BIData.json".
- Buttons:** "Cancel" and "OK" buttons at the bottom right.

## Deleting a Data Source

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

**Figure 4-23** Delete Data Source Confirmation



The screenshot shows a confirmation dialog box with a green checkmark icon and the title "Confirmation". The text inside reads "Delete this data source?". At the bottom, there are "Cancel" and "OK" buttons.

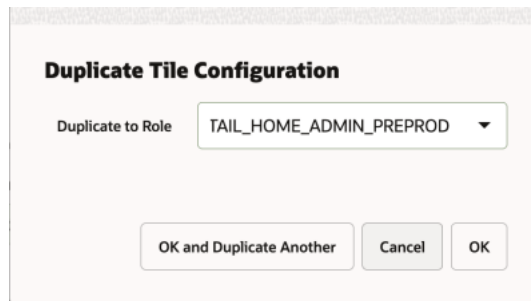
## Duplicating a Tile Configuration

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

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

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

**Figure 4-24 Duplicate Tile Configuration**



## Selecting Filters for a Tile

Filters for an application must be applied to individual tile states before they will show up for a user.

**Filters for Bi Two Metric (Custom)**

Active	Required	Filter Name	Filter Type
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check Box	Checkbox
<input type="checkbox"/>	<input type="checkbox"/>	test	Select One
<input checked="" type="checkbox"/>	<input type="checkbox"/>	BI filter	Multi-Select

This table allows enabling a filter for a tile state as well as designating whether it is required or not.

Filter values will be passed as query parameters to the data source backing a tile state.

## Banner and Contextual Area Configuration

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

 **Note:**

Currently there are no report layouts for banner and contextual reports available in the release version of Retail Home.

Figure 4-25 Banner and Contextual Area

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

1. In the Dashboard Configuration flow, select the **Banner and Contextual Area** tab if it is not already selected.
2. Select a role from the **Role** drop-down list.
3. Select the **Banner Active** check box. This determines whether or not the banner is displayed on the dashboard. If the banner is active, you must provide a value for the following:
  - Select a layout from the **Layout** drop-down list.
  - Select a banner data source name from the Banner data **Name** drop-down list.
  - Select a data source type from the **Type** drop-down list.
  - Enter a valid data source URL into the **Source** text box. The URL will be validated.
4. To configure the Contextual Area, select the check box to make the Primary Area active or the Secondary Area active. If you make both areas active, then both will be displayed on the dashboard. If you do not want to display the Contextual Area, then do not make either area active.

For whichever area(s) you have designated (Primary and/or Secondary) as active, provide values for the following:

- Select a layout from the **Layout** drop-down list
  - Select a data source name for the report from the **Name** drop-down list.
  - Select a data source type from the **Type** drop-down list.
  - Enter a valid data source URL into the **Source** text box. The URL will be validated.
5. Click **Save** to save your work and continue. Click **Save and Close** to save your work and close the tab.

## Duplicating a Banner and Contextual Area Configuration

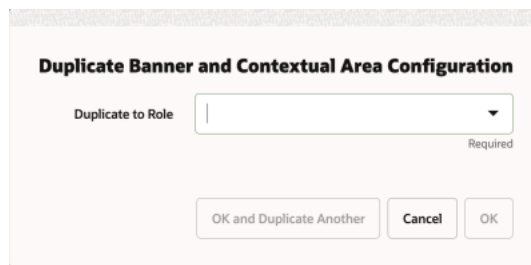
You can duplicate your Banner and Contextual Area Configuration to another role's Dashboard.

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

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

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

**Figure 4-26 Duplicate Banner and Contextual Area Configuration**



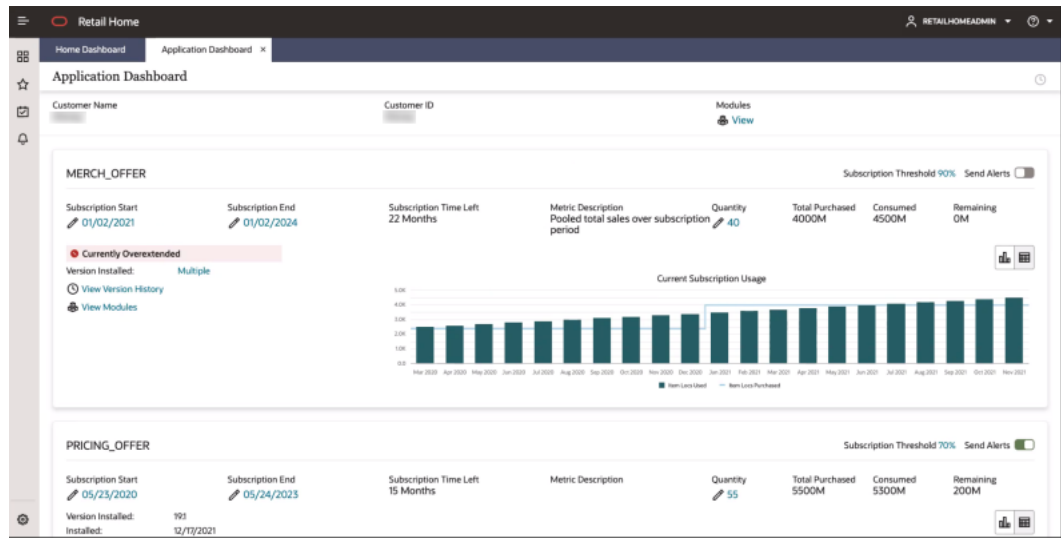
The screenshot shows a dialog box titled "Duplicate Banner and Contextual Area Configuration". Inside the dialog, there is a label "Duplicate to Role" followed by a dropdown menu. Below the dropdown menu, the word "Required" is written in a smaller font. At the bottom of the dialog, there are three buttons: "OK and Duplicate Another", "Cancel", and "OK".

# 5

## Application Dashboard

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

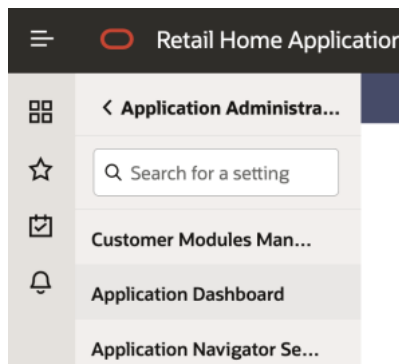
Figure 5-1 Application Dashboard Page



## Launching the Application Dashboard Page

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

Figure 5-2 Application Dashboard Page Link in Settings Menu

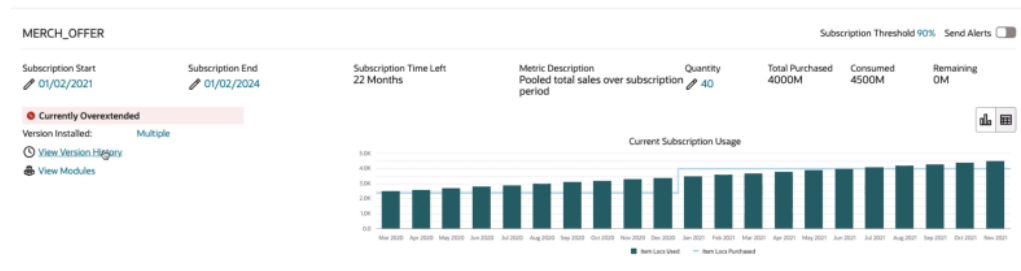




# Subscription Metrics

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

**Figure 5-3 Application Dashboard Subscription Metrics**



**Figure 5-4 Editing Subscription Details**

**Edit Subscription Details**

Quantity

Subscription Start

Subscription End

The Customer can edit Quantity purchased, Subscription Start Date, and Subscription End Date by clicking on the edit icon.

**Figure 5-5 Editing Subscription Threshold Details**

**Edit Subscription Details**

Subscription Threshold

The customer can also edit subscription threshold. An email alert is automatically triggered by the system once the consumed amount crosses the threshold limit set on the total purchased amount.

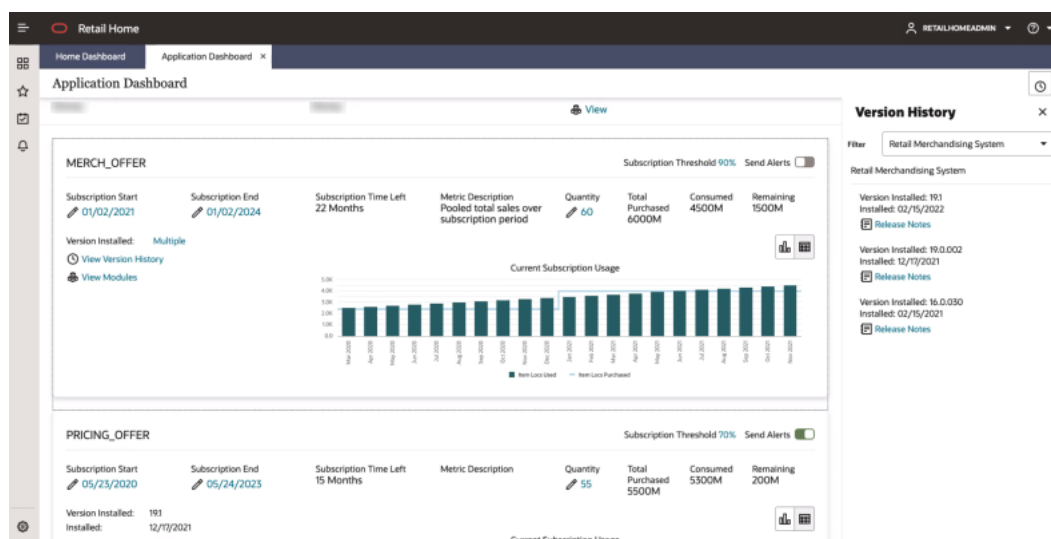
## Version

The Version area shows the currently installed version of the application, and when this version was installed. If multiple versions are present, a **Multiple** link will be shown. Clicking this link will display a list of installed versions.

## Version History Contextual Pane

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

**Figure 5-6 Application Dashboard Version History Contextual Pane**



## Setting Alerts Status

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

**Figure 5-7 Application Dashboard Setting Alerts Status**

Subscription Threshold 80% Send Alerts

# 6

## Admin Dashboard

In addition to the ability to view important metrics and KPIs in the Dashboard, the customer administrators can also view other tiles having application status, subscription metrics, batch metrics, shortcut links, and information that will be useful for them to refer or act upon.

### Application Navigator

This tile lists the applications configured in the Application Navigator Setup table and their application links (if added in Application Navigator Setup). The user also has an option to download all the links into a CSV file using the **Download All Links** button.

**Figure 6-1 Application Navigator Tile in Admin Dashboard**

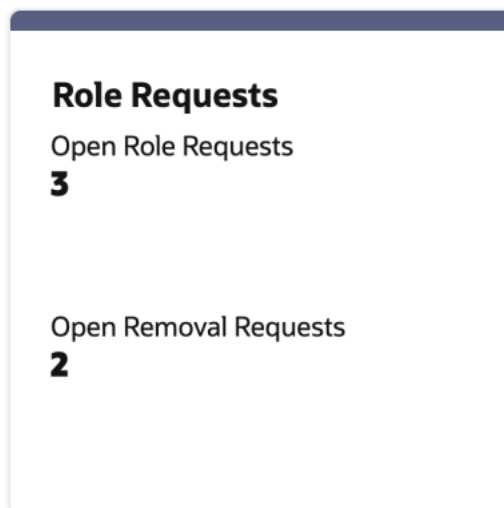
<b>Application Navigator</b>	
Applications	
<b>Application Name</b>	<b>Application Link</b>
Retail Insights	<a href="https://rgbu-phx-lbext-56-57.us.orac...">https://rgbu-phx-lbext-56-57.us.orac...</a>
Process Orchestration and Monitoring	<a href="https://home.retail.us-phoenix-1.ocs...">https://home.retail.us-phoenix-1.ocs...</a>
Oracle Retail Home	<a href="https://home.retail.us-phoenix-1.ocs...">https://home.retail.us-phoenix-1.ocs...</a>
Retail Science Platform	<a href="https://rgbu-phx-lbext-56-57.us.orac...">https://rgbu-phx-lbext-56-57.us.orac...</a>
Assortment and Space Optimization	
Offer Optimization	
Promotion and Markdown Optimizati...	
Allocations	
Invoice Match	
Sales Audit	
Merchandising	
Pricing	
MFP(Retail) Cloud Service	
MFP(Cost) Cloud Service	
Assortment Planning and Optimizati...	

**Download All Links**

## Role Requests

This tile displays a count of open requests made by users who requested to add or remove a role.

**Figure 6-2** Role Requests Tile in Admin Dashboard

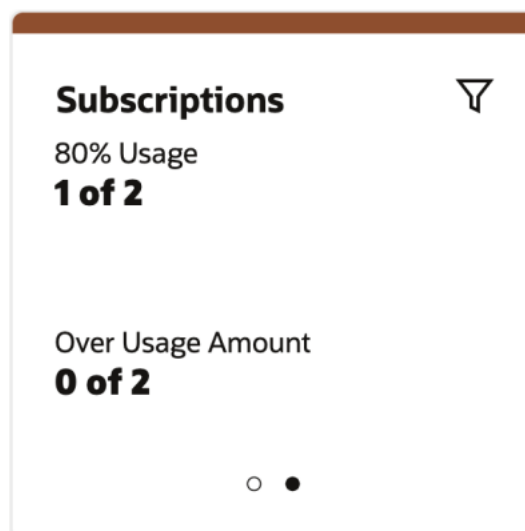


## Subscriptions

This tile displays the following customer subscriptions related information.

- Number of subscriptions above 80% threshold limit.
- Number of subscriptions above usage limit.

**Figure 6-3** Subscriptions Tile



## Outage Calendar

This report shows current and upcoming outages for all of the customer's Oracle Retail environments. Information displayed includes the scheduled date and time of the outage and whether it has completed.

Figure 6-4 Outage Calendar

# Outage Calendar

[View Calendar](#)

---

## Today

<div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; width: 40px; text-align: center;">04:00</div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; width: 40px; text-align: center;">10:00</div>	<p>01/02/2023</p> <p><b>Planned Outage - Infrastruct...</b></p> <p>Cust_PST*****676</p>	<div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px;">Notified</div>
<div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; width: 40px; text-align: center;">03:44</div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; width: 40px; text-align: center;">07:12</div>	<p>01/18/2023</p> <p><b>Planned Outage - Infrastruct...</b></p> <p>Cust_2001()(&amp;* &amp;*+++++</p>	<div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px;">Notified</div>
<div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; width: 40px; text-align: center;">00:19</div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; width: 40px; text-align: center;">17:12</div>	<p>02/02/2023</p> <p><b>Planned Outage - Infrastructure</b></p> <p>Cust_MST1</p>	<div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px;">Notified</div>
<div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; width: 40px; text-align: center;">01:20</div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; width: 40px; text-align: center;">09:09</div>	<p>02/02/2023</p> <p><b>Planned Outage - Infrastruct...</b></p> <p>Cust_MST2</p>	<div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px;">Notified</div>
<div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; width: 40px; text-align: center;">01:37</div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; width: 40px; text-align: center;">18:55</div>	<p>02/02/2023</p> <p><b>Planned Outage - Infrastructure</b></p> <p>Cust_CST</p>	<div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px;">Notified</div>
<div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; width: 40px; text-align: center;">11:25</div> <div style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; width: 40px; text-align: center;">23:34</div>	<p>02/02/2023</p> <p><b>Planned Outage - Infrastructure</b></p> <p>Cust_EST</p>	<div style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px;">Notified</div>

Click the **View Calendar** link in the upper-right corner to open a new tab listing all upcoming outages in a sortable table.

Home Dashboard    Outage Calendar ×

### Outage Calendar Refresh

Name	Status	Outage Date	Start Time	End Time
Planned Outage - Infrastructure Cust_2001(6*6*++++)	Notified	01/18/2023	3:44:00 AM	7:12:00 AM
Planned Outage - Infrastructure Cust_2002***-----	Notified	02/20/2023	4:34:00 AM	9:23:00 AM
Planned Outage - Infrastructure Cust_MST1	Notified	02/02/2023	12:19:00 AM	5:12:00 PM
Planned Outage - Infrastructure Cust_CST	Notified	02/02/2023	1:37:00 AM	6:55:00 PM
Planned Outage - Infrastructure Cust_EST	Notified	02/02/2023	11:25:00 AM	11:34:00 PM
Planned Outage - Infrastructure Cust_PST*****6/6	Notified	01/02/2023	4:00:00 AM	10:00:00 AM
Planned Outage - Infrastructure Cust_MST2	Notified	02/02/2023	1:20:00 AM	9:09:00 AM
Planned Outage - Infrastructure				

# 7

## Report Configuration

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



### Note:

Currently there are no report layouts for banner and contextual reports available in the release version of Retail Home

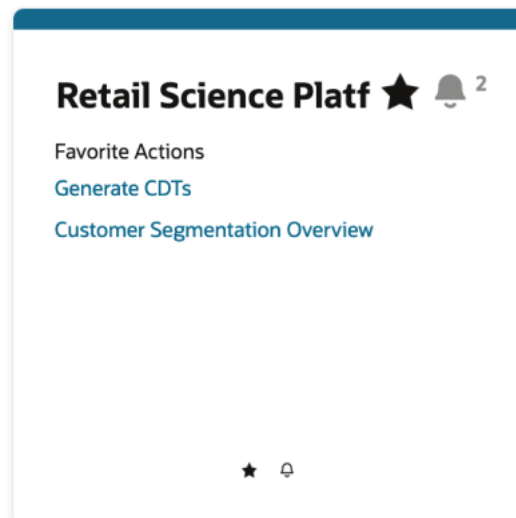
## Tile State Reports

These reports are available to use on tile states within an application tile. See [Dashboard Configuration](#) for details about configuring tile states and data sources. See the "[Appendix: Report Data Requirements](#)" appendix for details about expected payloads from back-end REST services and BI.

## Favorites

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

## Favorites Sample





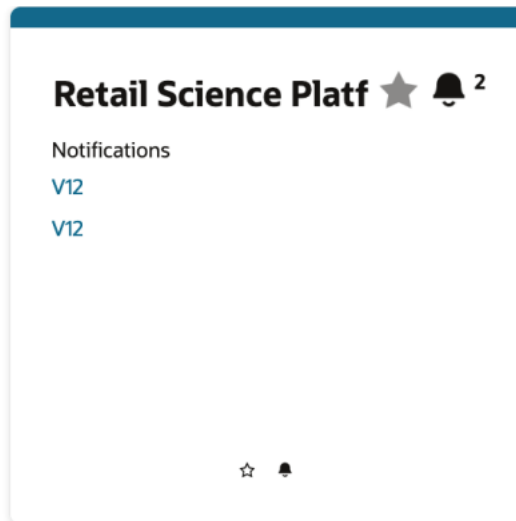
**Table 7-1 Data Source Configuration**

<b>Name</b>	favoritesService
<b>Type</b>	REST
<b>Source</b>	https://{host}:{port}/orase-domain/RetailAppsPlatformServices

## Notifications

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

### Notifications Sample

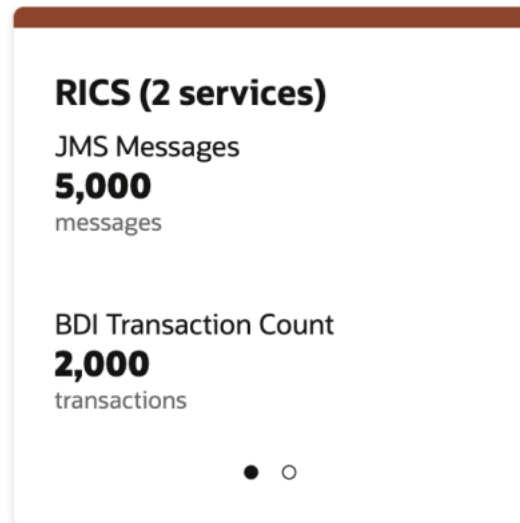
**Table 7-2 Data Source Configuration**

<b>Name</b>	notificationsService
<b>Type</b>	REST
<b>Source</b>	https://{host}:{port}/orase-domain/RetailAppsPlatformServices

## Two Metric Summary

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

## Two Metric Summary Sample



**Table 7-3 Data Source Configuration**

<b>Name</b>	RetailHomeReportDataService
<b>Type</b>	REST
<b>Source</b>	https://{host}:{port}/path/to/service/endpoint

## Eight Metric Summary

The Eight Metric Summary report displays one to eight metrics in a standard layout (requires a 2x2 tile). The data is retrieved from a service endpoint that conforms to the standard API supported by this report.

Figure 7-1 Eight Metric Summary Sample

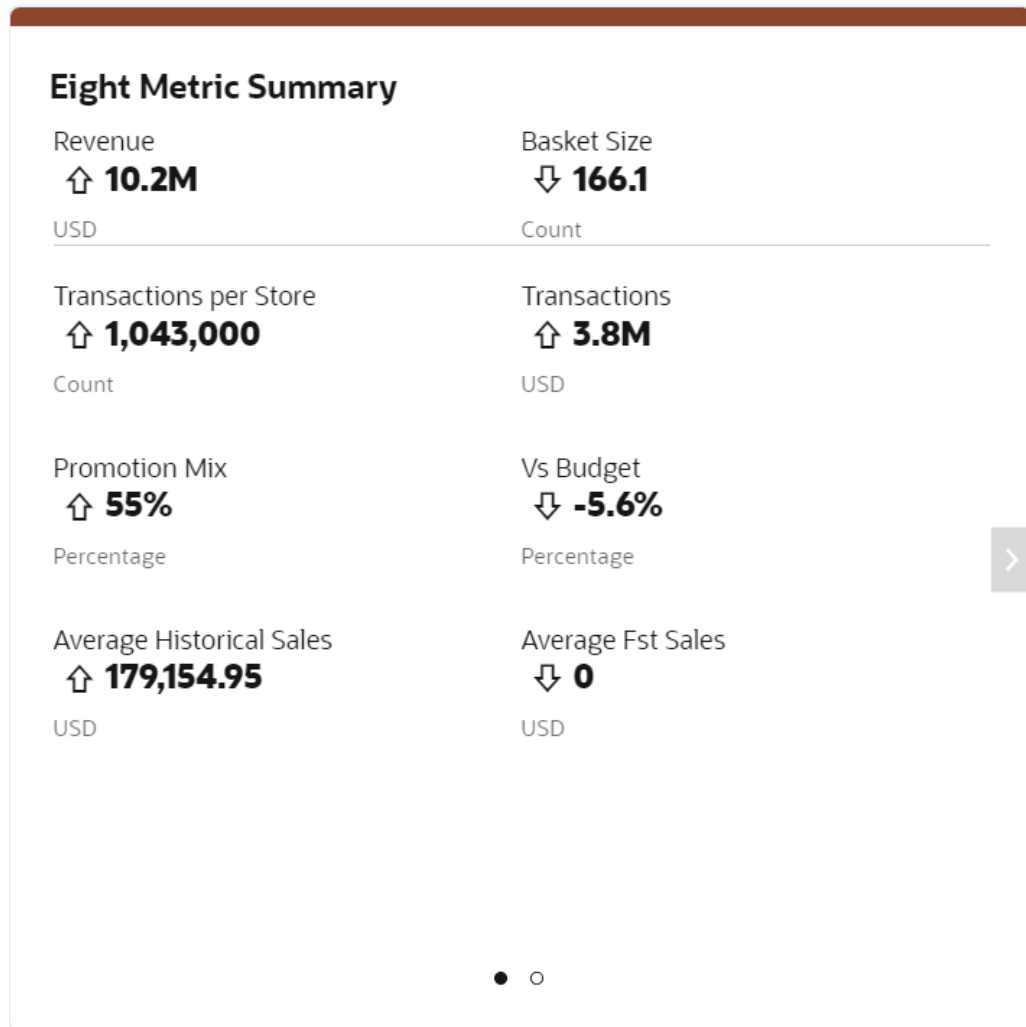


Table 7-4 Data Source Configuration

<b>Name</b>	RetailHomeReportDataService
<b>Type</b>	REST
<b>Source</b>	https://{host}:{port}/path/to/service/endpoint

## Twelve Metric Summary

The Twelve Metric Summary report displays one to twelve metrics in a standard layout (requires a 2x2 tile). The data is retrieved from a service endpoint that conforms to the standard API supported by this report.

Figure 7-2 Twelve Metric Summary Sample

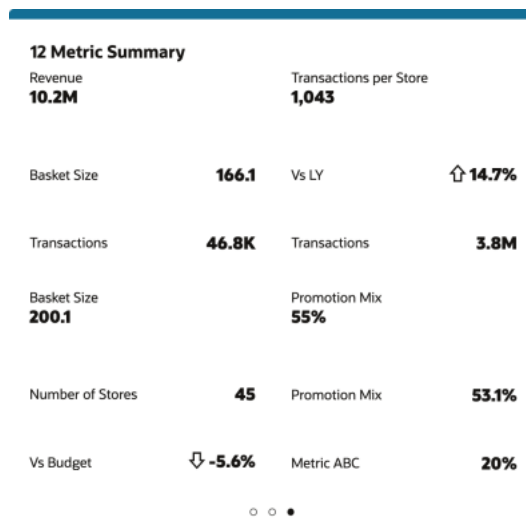


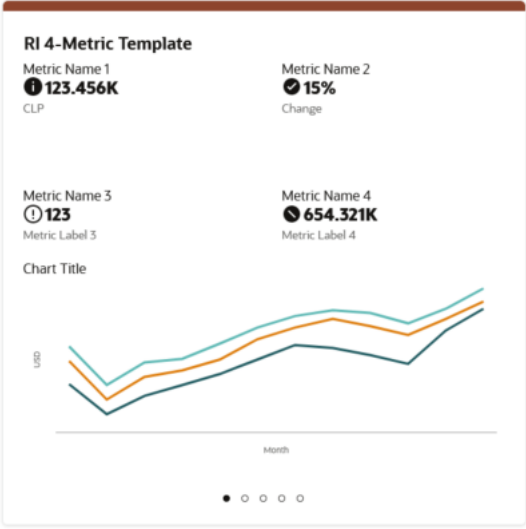
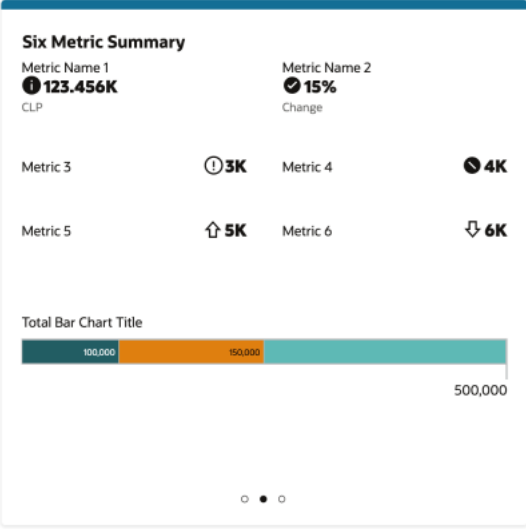
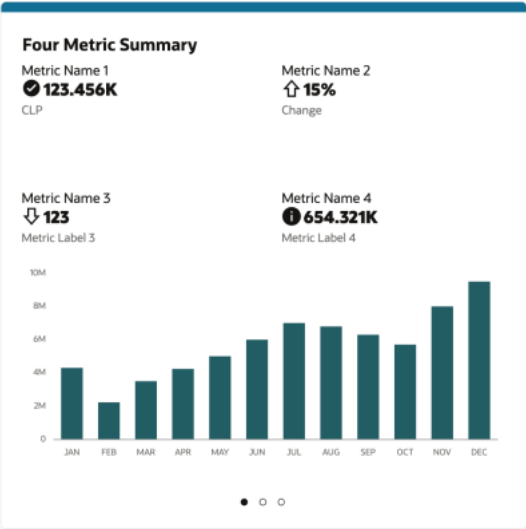
Table 7-5 Data Source Configuration

<b>Name</b>	RetailHomeReportDataService
<b>Type</b>	REST
<b>Source</b>	https://{host}:{port}/path/to/service/endpoint

## Four or Six Metric Summary

The Four Metric Summary and Six Metric Summary reports displays one to four (or one to six) metrics plus an optional metrics chart in a standard layout (requires a 2x2 tile). These reports also display a single chart with two series or KPIs. The data is retrieved from a service endpoint that conforms to the standard API supported by this report.

Figure 7-3 Four and Six Metric Summary Samples



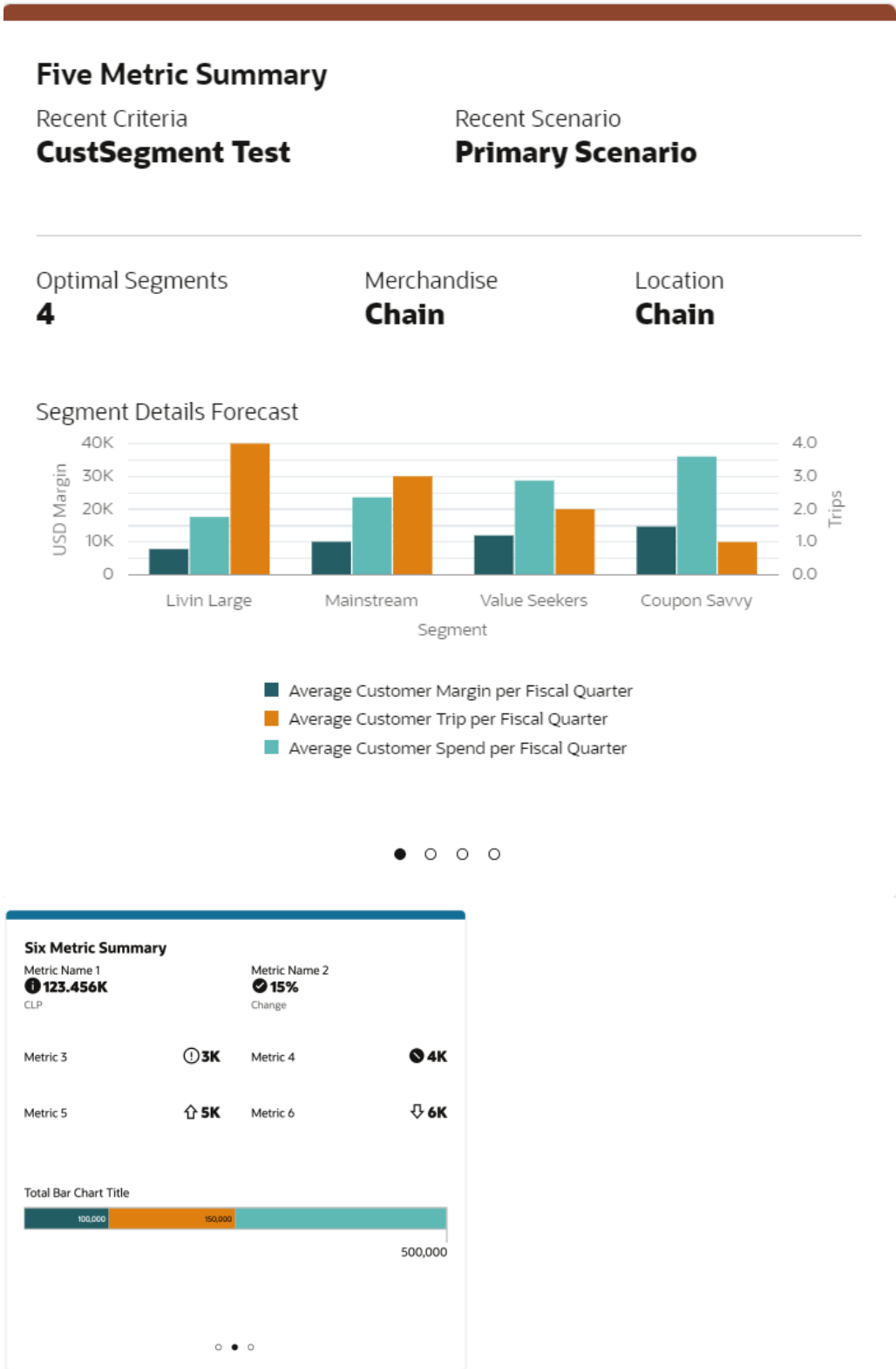
**Table 7-6 Data Source Configuration**

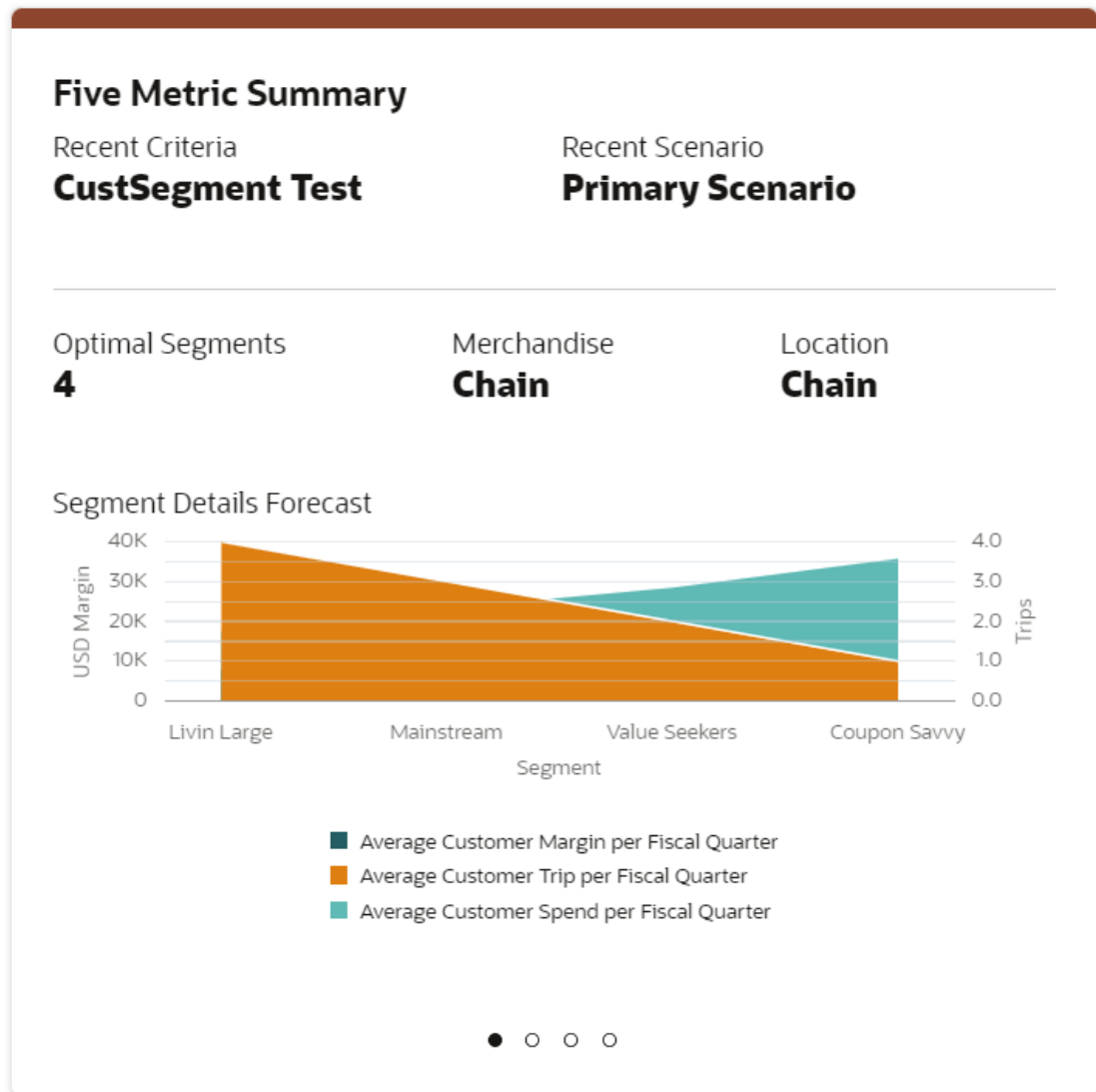
<b>Name</b>	RetailHomeReportDataService
<b>Type</b>	REST
<b>Source</b>	https://{host}:{port}/path/to/service/endpoint

## Five Metric Summary

The Five Metric Summary displays one to five metrics plus an optional metrics chart in a standard layout (requires a 2x2 tile). These reports also display a single chart with three series or KPIs. The data is retrieved from a service endpoint that conforms to the standard API supported by this report.

Figure 7-4 Five Metric Summary Samples





**Table 7-7 Data Source Configuration**

<b>Name</b>	RetailHomeReportDataService
<b>Type</b>	REST
<b>Source</b>	https://{host}:{port}/path/to/service/endpoint

## Table Reports

The Metrics Table, Image Table and Image Metrics One Metric Table, Table reports display data in a tabular layout (requires a 2x2 tile). The data is retrieved from a service endpoint that conforms to the standard API supported by these reports.



Figure 7-5 Metrics Table Sample

**Metrics Table**  
Top Selling by Margin

Item	Units Sold	Avg Cost	Margin
Color Block Sundress	654.3K	67.45	45.67%
ColorBlockSundress1dawsef...	954.3K	67.45	45.67%
Color Block Sundress2		87.45	45.67%
Color Block Sundress3	654.3K		45.67%
Color Block Sundress4	654.3K	67.45	
Color Block Sundress5	654.3K	57.45	45.67%
Color Block Sundress6	654.3K	67.45	45.67%
Color Block Sundress7	654.3K	67.45	45.67%
Color Block Sundress8	654.3K	67.45	45.67%
Color Block Sundress9	654.3K	67.45	45.67%
Color Block SundressA	654.3K	67.45	45.67%
Color Block SundressB	654.3K	67.45	45.67%
Color Block SundressC	654.3K	67.45	45.67%
Color Block Sundress	654.3K	67.45	45.67%
Color Block Sundress	654.3K	67.45	45.67%
Color Block Sundress	654.3K	67.45	45.67%
Color Block Sundress	654.3K	67.45	45.67%
Color Block Sundress	654.3K	67.45	45.67%

(1-18 of 41 items) |< < > >|

● ○ ○

Figure 7-6 One Metric Table Sample

**One Metric Table**  
Top 5 Affinity Products by Average Sales Quantity

If and Then	Average Sales Quantity
ES Disposable Coffee Filters No. 4 100 Pack The Aroma Red SNF	<b>20,520</b>
Yoplait Low Fat Vanilla Yogurt The Aroma Red SNF	<b>17,812</b>
Perla Pods 16 Count Variety Pack Perla Pods Mocha	<b>15,317</b>
The Aroma Red SNF DZH Yogurt	<b>15,048</b>
Perla Regular Pods Perla Pods 16 Count Light Roast Lover Variety Pa	<b>13,605</b>

○ ● ○ ○

Figure 7-7 Image Table Sample

Image	Name and ID	Sales
	Color Block Sundress 10001003	854.3M
	Color Item FULL ROW 10001323	1.235B
	eqwtge 10001323	1.235B
	ccccccc 10001323	45.326K
	AAAAAA 10001323	95.648K
	Color Item FULLawdsefs ROWfbsdfwefsdvfgsdfsfgrhethmwe... 10001323	1.235B
	Color Item FULL ROWfbsdfwefsdvfgsdfsfesg 10001323	4.356K

(1-7 of 14 items) |< < > >|

Figure 7-8 Image Metrics Table Sample

Image	Name and ID	Units Sold	Avg Cost	Margin
	Color Block Sundress 10001003	654.3M	71.23	45.67%
	ASefiuh khujghftfdgcjgukjvxfvbnkfdxgcvkqffgixvhkifthdfxbk... 10001004	264.589K	44.57	12.54%
	Color Block Sundress 10001003	564	67.45	45.67%
	Color Block Sundress 10001003	2.356K	102.95	86%
	Color Block Sundress 10001003	754.3M	22.13	45.67%
	Color Block Sundress 10001003	854.3M	67.45	21%
	Color Block Sundress 10001003	654.3M	67.45	45.67%

(1-7 of 9 items) |< < > >|

Table 7-8 Data Source Configuration

<b>Name</b>	RetailHomeReportDataService
<b>Type</b>	REST
<b>Source</b>	https://{host}:{port}/path/to/service/endpoint

## ORASE Reports

The Demand Transference and ORASE Offer Optimization reports display metric data in a standard layout (requires a 1x1 tile). The data is retrieved from a service endpoint that conforms to the standard API supported by these reports.

Figure 7-9 Demand Transference Sample

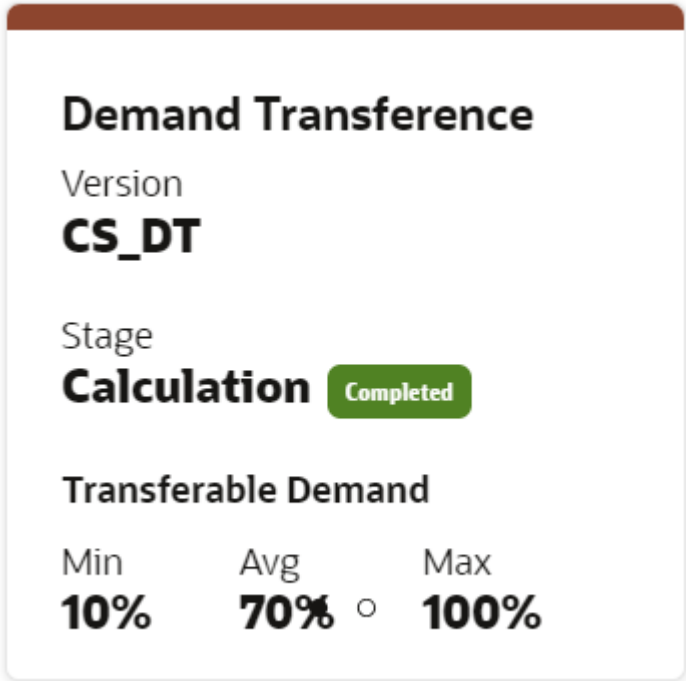
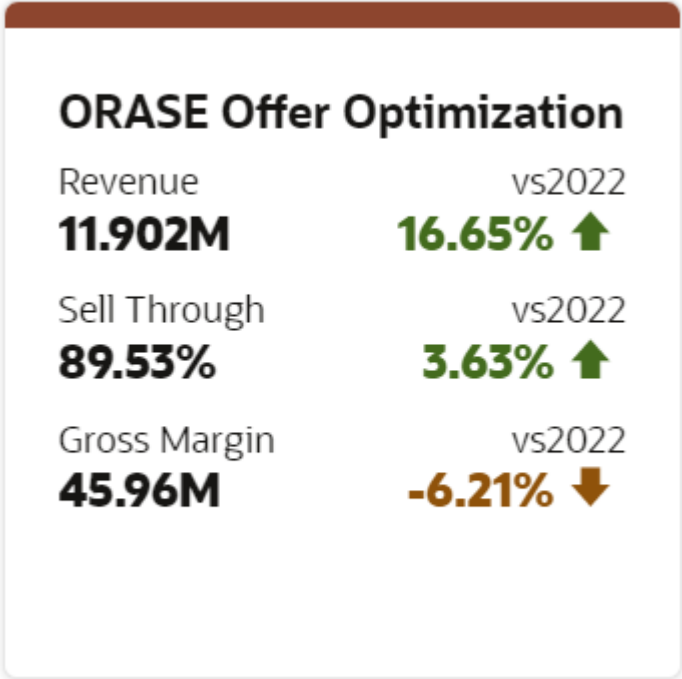


Figure 7-10 ORASE Offer Optimization Sample

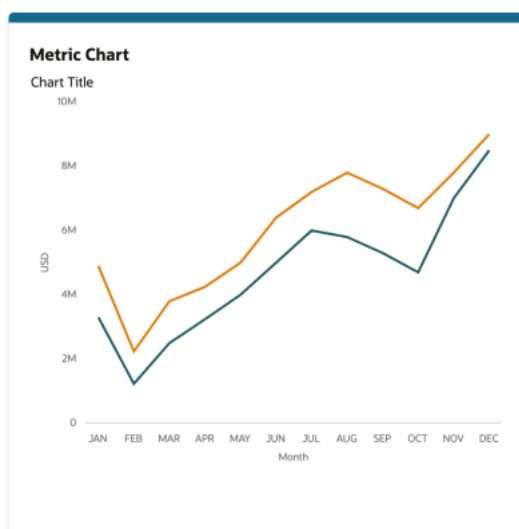


**Table 7-9 Data Source Configuration**

<b>Name</b>	RetailHomeReportDataService
<b>Type</b>	REST
<b>Source</b>	https://{host}:{port}/path/to/service/endpoint

## Metric Chart Reports

The Metric Chart reports display only a chart with no metrics on a 1x1 or 2x2 tile. The data is retrieved from a service endpoint that conforms to the standard API supported by these reports.

**Figure 7-11 Metrics Chart Sample**

## Administrator Dashboard Tile States

There are three tiles on the default administrator dashboard that are not intended for user configuration. The Role Requests, Application Navigator, and Subscriptions tiles and their corresponding tile states are generated by default and do not make use of data sources. They are all set up to display information automatically from within Retail Home.

## Tile State Report Templates

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

# 8

## Custom Tile State Reports Configuration

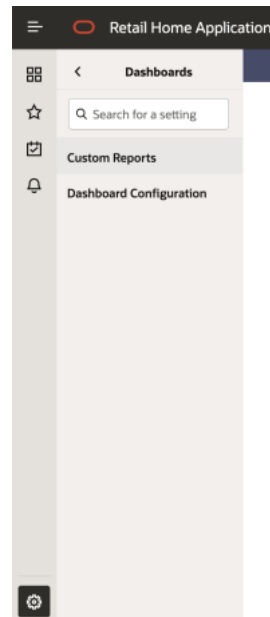
Retail Home not only ships with built-in reports, but also supports the creation of custom tile state reports from within the application.

This chapter describes the process for creating custom tile state reports from a tile state report template.

To access the Custom Tile State Reports page, complete the following steps:

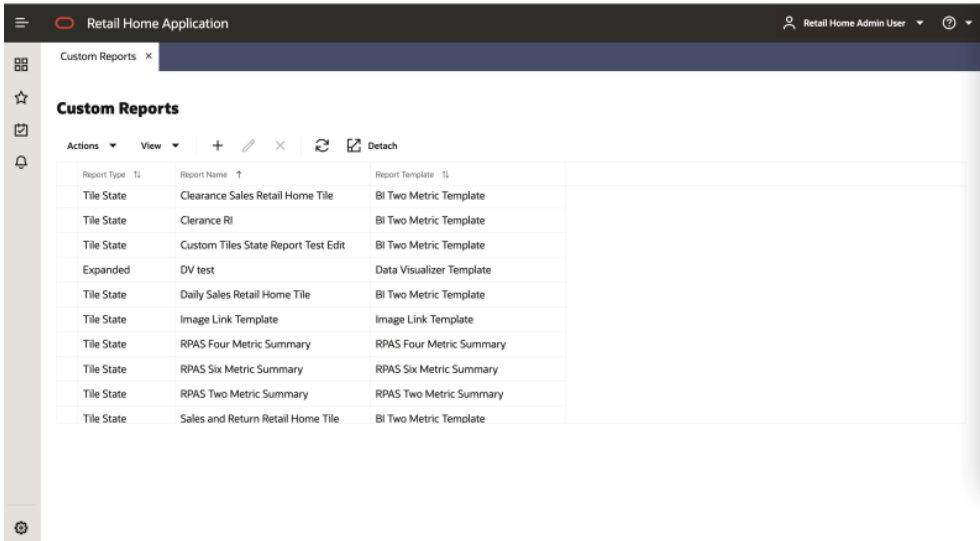
1. Open the Settings navigation menu.
2. Select **Dashboards and Reports**.
3. Select **Dashboards**.

**Figure 8-1 Configuration**



4. Select **Custom Tile State Reports**, shown in Figure 3-27 Custom Tile State Reports, which displays a table listing all the custom tile state reports that have been added and a toolbar that is used to add, edit, and delete custom tile state reports.

Figure 8-2 Custom Tile State Reports



## Adding a Custom Tile State Report

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

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

Figure 8-3 Add Custom Tile State Report

**Add Custom Report**

Report Type

Tile State Expanded Contextual Area

Report Template  
BI Two Metric Template

Report Name

Required

**Report Parameters**

BI Analysis Catalog Location

Required

OK and Add Another Cancel OK

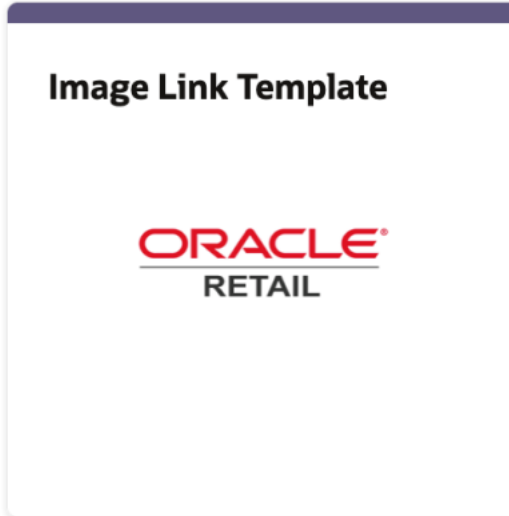
2. Select a template from the Report Template drop-down list. Note that the Report Parameters section of the dialog will update dynamically, depending on the selected template since each template defines its own set of report parameters.
3. Enter a name in the Report Name field. This name is used to identify the report in the Tile Configuration step of the Dashboard Configuration page.
4. Complete the Report Parameters section. See the documentation for each Report Template for an explanation of the template's Report Parameter fields and expected values.
5. Click **OK** to add the custom tile state report or **OK and Add Another** to add the custom tile state report and then add another. Click **Cancel** to not create the custom tile state report.

## Configuring the Image Link Template

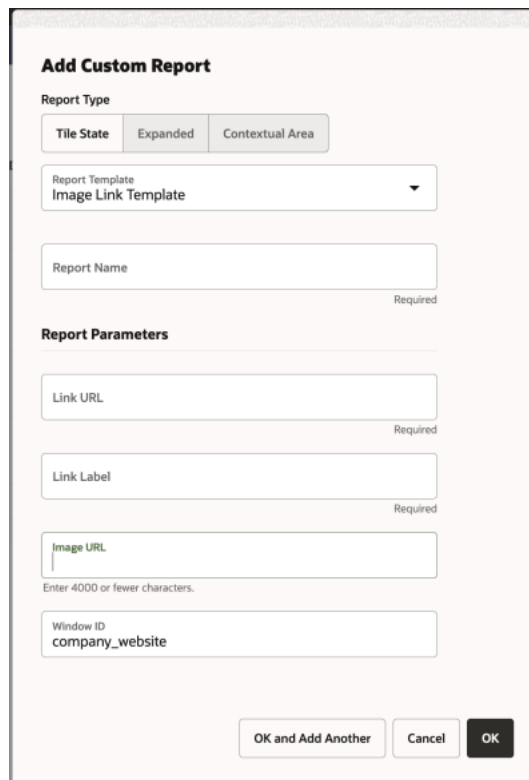
The Image Link Template allows an administrator to create a tile state report that renders an image that launches a configured link in a new browser tab. For example, an administrator

may create a "Company Website" tile state report that shows a company logo that when clicked opens the company's website in a new browser tab.

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



The following screenshot shows the Image Link Template report parameters.

A screenshot of the "Add Custom Report" dialog box. The dialog has a title bar and a main content area. At the top, it says "Add Custom Report". Below that, there are three tabs: "Tile State", "Expanded", and "Contextual Area", with "Tile State" selected. Under "Report Type", there is a dropdown menu showing "Image Link Template". Below that is a "Report Name" text input field, which is empty and has a "Required" label below it. Under "Report Parameters", there are three text input fields: "Link URL" (empty, required), "Link Label" (empty, required), and "Image URL" (empty, with a note "Enter 4000 or fewer characters."). Below these is a "Window ID" text input field containing the text "company\_website". At the bottom right, there are three buttons: "OK and Add Another", "Cancel", and "OK".

The Image Link Template has the following parameters:



**Table 8-1 Image Link Template Parameters**

Parameter Name	Description
Link URL	The URL that will be opened in a new browser tab when the image is clicked.
Link Label	A label that will display when hovering over the image.
Image URL	The URL where the image in the tile can be accessed.
Window ID	A text identifier specifying which window / browser tab to open the link in. If you create multiple Image Link reports, but you want them all to open in the same browser window or tab, you would specify the same Window ID in each report. Otherwise, this can be any unique value.

## Configuring BI Templates

Tile state reports created from BI templates render the tile state layout with data coming from one or more Retail Insights (RI) analyses.

**Note:**

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

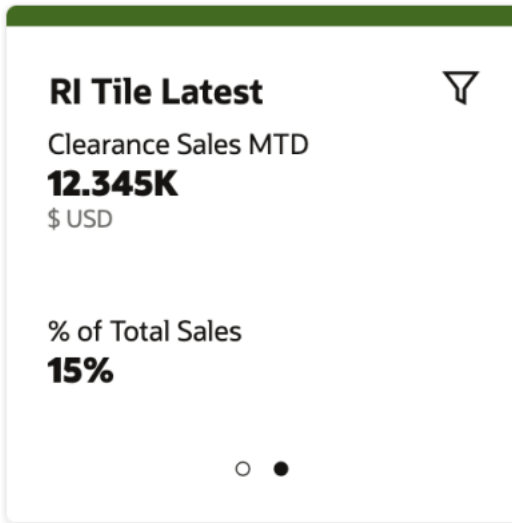
See appendix "[Appendix: Report Data Requirements](#)" for details about required analyses for each of the supported BI templates.

**Note:**

Users must have permission to use RI to view RI report data in Retail Home. Reports using these templates will fail to load for users without the necessary permissions. Refer to the [Oracle Retail Identity Management for OCI IAM Startup Guide](#) for details on RI roles.

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

Figure 8-4 Tile State Example



Each metric has a label, value, and optional description. In the above tile state example, the first metric's label is Daily Sales Retail, its value is 5,837K, and its description is USD.

The BI Two Metric Template has the following report parameter configuration:

### Add Custom Report

Report Type

Tile State	Expanded	Contextual Area
------------	----------	-----------------

Report Template  
BI Two Metric Template ▼

Report Name

Required

### Report Parameters

BI Analysis Catalog Location

Required

OK and Add Another    Cancel    OK

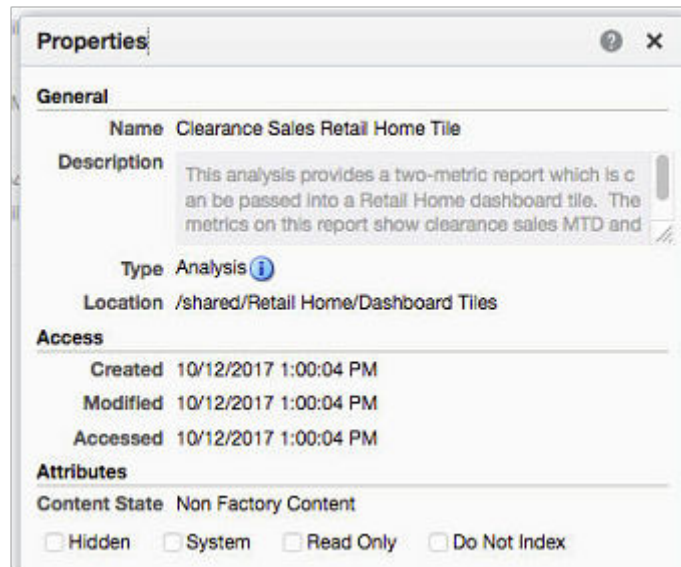
## BI Analysis Catalog Path

BI templates require one or more BI Analysis Catalog Locations. The BI Analysis Catalog Location is the path to the analysis within RI.

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

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

Figure 8-5 Clearance Sales Retail Home Tile - Analysis Path



In the above example, the analysis's Location is `/shared/Retail Home/Dashboard Tiles` and the analysis's Name is **Clearance Sales Retail Home Tile**. The full **BI Analysis Catalog Path** is formed by joining the Location and Name with a "/>.

The structure of the RI analysis must match the documented format described in the appendix "[Appendix: Report Data Requirements](#)".

No data source is required when adding tile state reports created with the BI templates, , the location of the BI instance is taken from application configuration instead.

If the report backs a tile state that has filters set, the filters will be passed as variables to the BI analysis for processing.

## Configuring the Data Visualizer Template

The data visualizer template allows embedding data visualization from Retail Insights in an expanded report.

**Add Custom Report**

Report Type

Tile State Expanded Contextual Area

Report Template  
Data Visualizer Template

Report Name Required

**Report Parameters**

Catalog Ref Required

Active Page

Active Tab ID

OK and Add Another Cancel OK

The catalog reference is retrieved in the same way as for the BI tile states. The default view of the data visualizer report can be controlled using the optional active page and tab ID values. Refer to the Data Visualizer documentation on embedded views for more information on what values to enter for these.



**Note:**

The Data Visualizer expanded view will open the report in Data Visualizer in a new tab.

## Configuring the Metric Summary Template

The metric summary templates are configured to render arbitrary metric summary tiles in Retail Home. There are templates for all metric summary and table reports.

The screenshot shows a web form titled "Add Custom Report". It features a "Report Type" section with three radio buttons: "Tile State", "Expanded", and "Contextual Area". Below this is a "Report Template" dropdown menu currently set to "Four Metric Summary". A "Report Name" text input field is present, with a "Required" label to its right. The "Report Parameters" section contains several text input fields: "Tile State Context", "Included Header Name 1", "Included Header Value 1", "Included Header Name 2", and "Included Header Value 2". At the bottom right, there are three buttons: "OK and Add Another", "Cancel", and "OK".

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

## Configuring the RPAS Metric Summary Template

The RPAS (Retail Predictive Application Server) Metric Summary Templates are pre-configured to render metrics sourced from the RPAS services as metric summary tiles in Retail Home. There are templates for all metric summary and table reports.

**Add Custom Report**

Report Type

Tile State Expanded Contextual Area

Report Template  
RPAS Two Metric Summary

Report Name Required

**Report Parameters**

Tile State Context

Included Header Name 1

Included Header Value 1

Included Header Name 2

Included Header Value 2

OK and Add Another Cancel OK

The template has the following features:

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

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

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

## Editing a Custom Tile State Report

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

1. Select the tile state report that you want to edit in the table.
2. Click **Edit**. You see the Edit Custom Tile State Report dialog.

Figure 8-6 Edit Custom Tile State Report

**Edit Custom Report**

Report Type

Tile State Expanded Contextual Area

Report Template  
BI Two Metric Template

Report Name  
Clearance Sales Retail Home Tile

Enter 120 or fewer characters.

Report Parameters

BI Analysis Catalog Location  
/shared/Retail Home/Dashboard Tiles/Clearance Sales Re

Cancel OK

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

 **Note:**

You cannot change the Report Template of a custom tile state report once the report has been added. You must either add a new custom report tile state report or delete your existing custom tile state report and then add a new one.

## Deleting a Custom Tile State Report

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

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



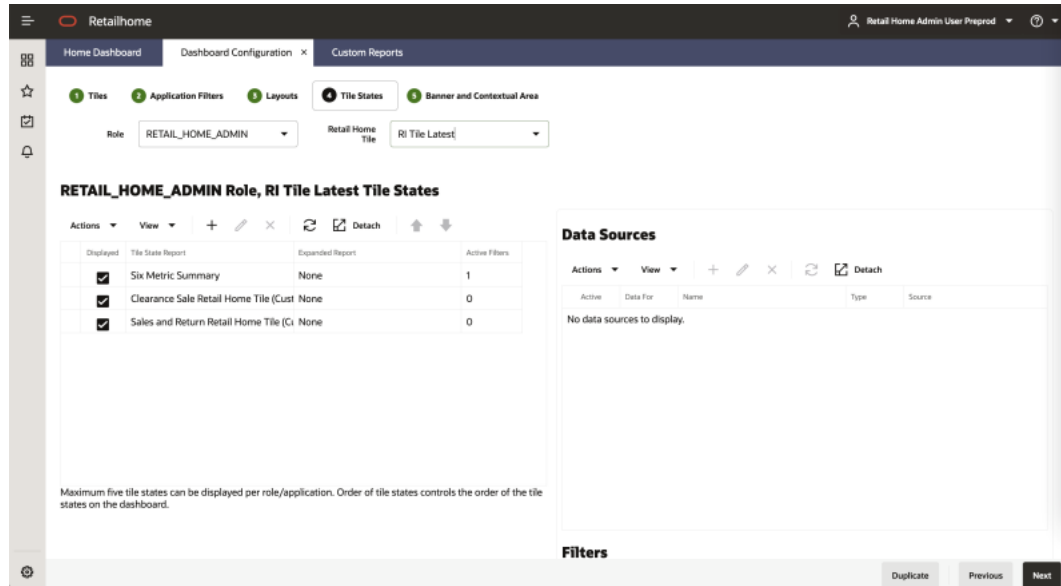
## Adding a Custom Tile State Report to a Tile State

All custom tile state reports added on the Custom Tile State Reports page are available to add to a tile on the Tile configuration step of the Dashboard Configuration page. You can find each custom tile state report by looking for its Report Name that was entered on the Custom Tile State Reports page.

 **Note:**

Each custom report is further marked as a custom report on the Tile Configuration screen with the word "(Custom)" appended to the custom report name.

**Figure 8-7 Custom Tile State Report**



# 9

## Oracle Application Express Integration

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

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

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

### Two Metric Tile State Report

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

### Service Query Structure

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

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

**Table 9-1 Columns Returned by Query**

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

The following table lists the supported format values:

**Table 9-2 Format Values**

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

The following table lists the supported indicator values:

**Table 9-3 Indicator Values**

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

## Service Query Examples

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

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

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

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

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

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

```
select
  'Metric 1' NAME,
  1234567890 VALUE,
  'S' VALUE_FORMAT,
  'USD' VALUE_LABEL,
```

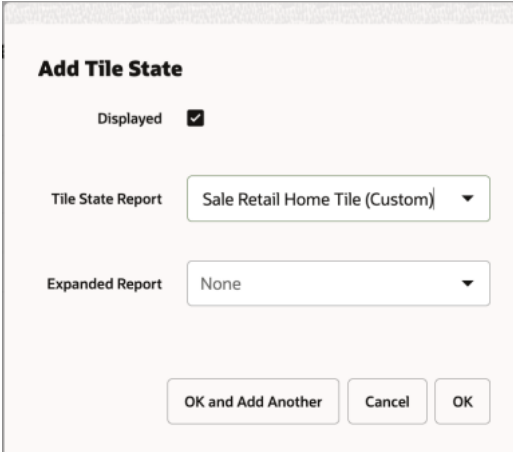
```
'critical' INDICATOR
from dual
union
select
  'Order Count' NAME,
  8 VALUE,
  NULL VALUE_FORMAT,
  NULL VALUE_LABEL,
  NULL INDICATOR
from dual
```

## Retail Home Tile State Report Configuration

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

First, create a new tile state:

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



**Add Tile State**

Displayed

Tile State Report: Sale Retail Home Tile (Custom) ▼

Expanded Report: None ▼

OK and Add Another Cancel OK

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

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

**Add Data Source**

Data For  Tile State  Expanded Report

Active

Name

Type

Source   
Required

# 10

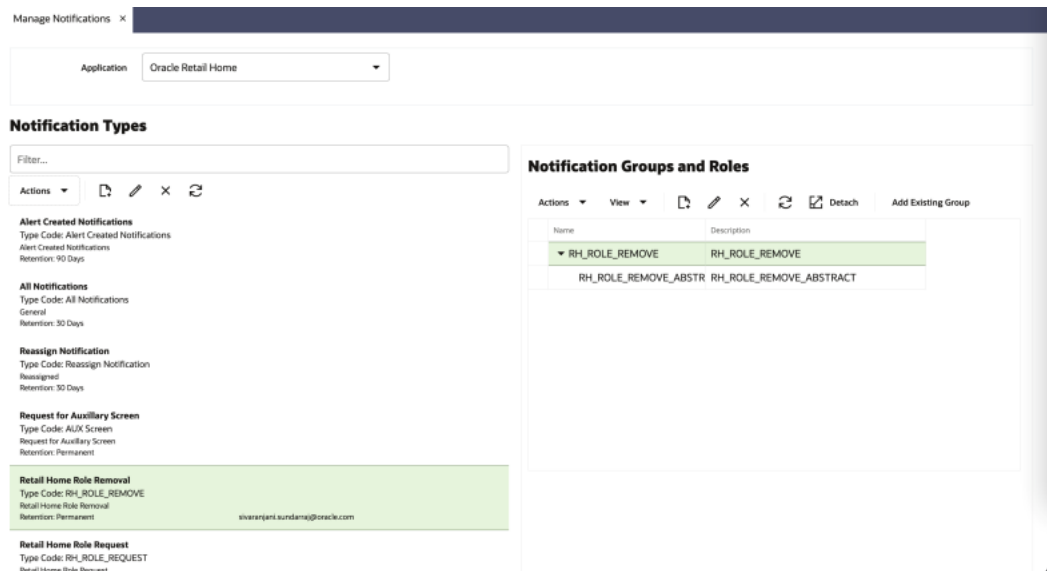
## Notifications Administration

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

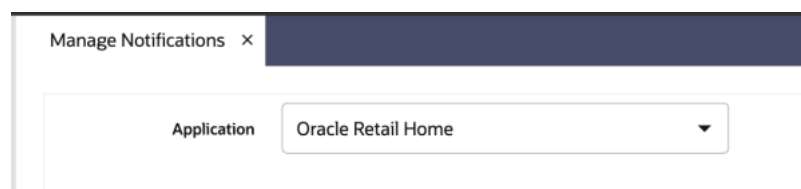
### Manage Notifications

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

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



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



## Notification Types

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

### Notification Types

The screenshot shows the 'Notification Types' interface. At the top is a search bar labeled 'Filter...'. Below it is a toolbar with an 'Actions' dropdown menu and four icons: a document with a plus sign, a pencil, a cross, and a refresh symbol. The main area contains a list of notification types. The first entry is 'Alert Created Notifications' in bold, with a description: 'Type Code: Alert Created Notifications', 'Alert Created Notifications', and 'Retention: 90 Days'. The second entry is 'All Notifications' in bold, with a description: 'Type Code: All Notifications', 'General', and 'Retention: 30 Days'.

## Notification Types Filter

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

## Notification Types Toolbar

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

## Notification Types List

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

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

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

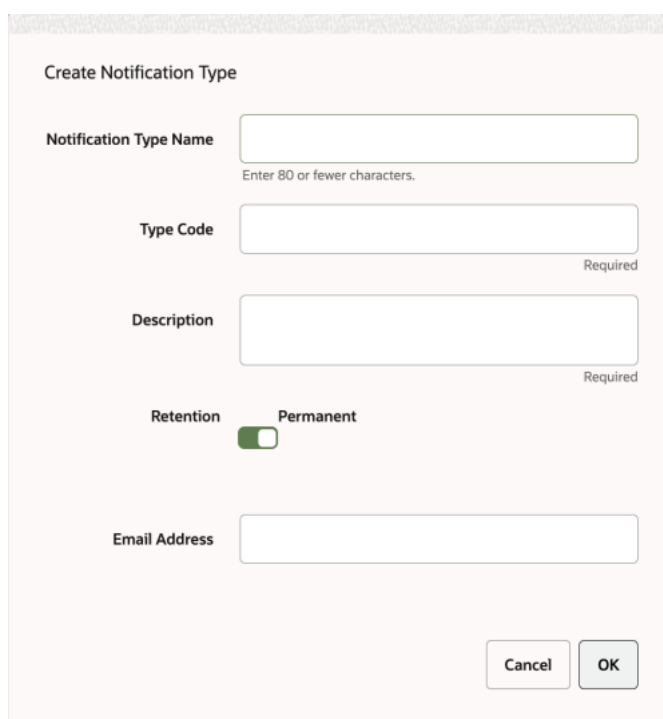
The last piece of information for a notification type is an email address, which will be sent an email notification whenever a notification of this type is generated. This field was designed to contain a mailing list email, but strictly speaking any email address may be provided.

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

## Creating and Editing Notification Types

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

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



The screenshot shows a dialog box titled "Create Notification Type". It contains the following fields and controls:

- Notification Type Name:** A text input field with a note below it: "Enter 80 or fewer characters."
- Type Code:** A text input field with the label "Required" to its right.
- Description:** A text input field with the label "Required" to its right.
- Retention:** A toggle switch currently set to "Permanent".
- Email Address:** A text input field.
- Buttons:** "Cancel" and "OK" buttons at the bottom right.

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

## Removing a Notification Type

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



## Refreshing Notification Types

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

## Notification Groups and Roles

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

Name	Description
▼ RH_ROLE_REMOVE	RH_ROLE_REMOVE
RH_ROLE_REMOVE_ABSTR	RH_ROLE_REMOVE_ABSTRACT

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

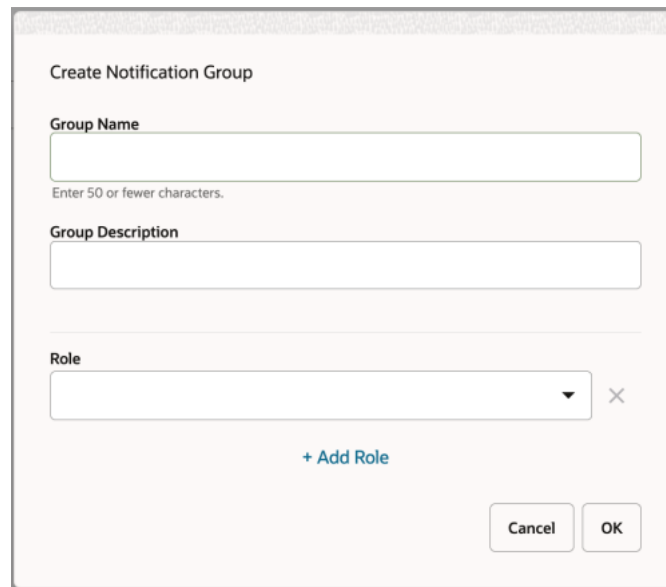
## Notification Groups and Roles Toolbar

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

## Creating and Editing Notification Groups

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

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

**Figure 10-1 Create Notification Group**

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

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

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

## Removing Notification Groups

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

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

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

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

## Refreshing Notification Groups

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

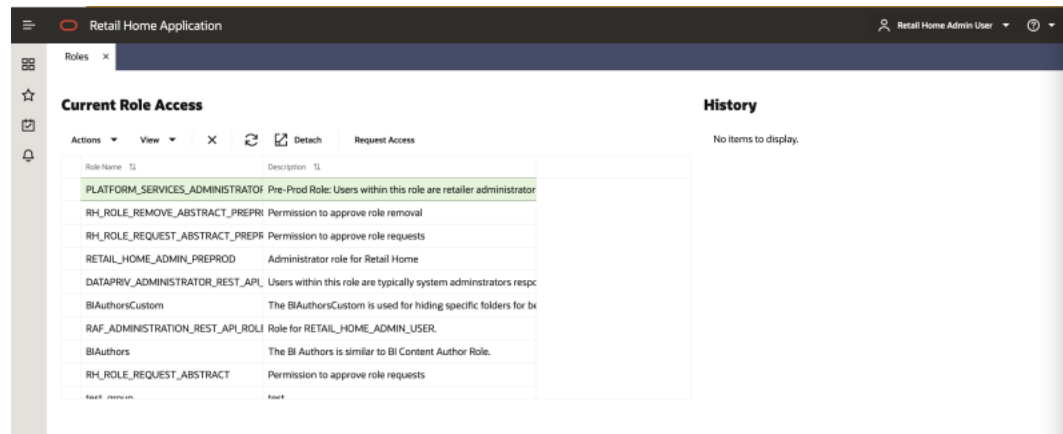
## Detaching the Notification Groups Region

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

# 11

## Role Requests

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



## Role Request Flow

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

## Configuration

### Incomplete Configuration

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

### IDCS or OCI IAM Admin URL

Retail Home gets configured with a URL to launch the Admin UI for IDCS or OCI IAM during the installation of Retail Home. When users make role requests a notification will be generated in Retail Home for the RH\_ROLE\_REQUEST or RH\_ROLE\_REMOVE notification type depending on the type of request. An admin user who has received this notification can

click on the notification to launch the Admin UI for IDCS or OCI IAM using the URL that was configured during installation.

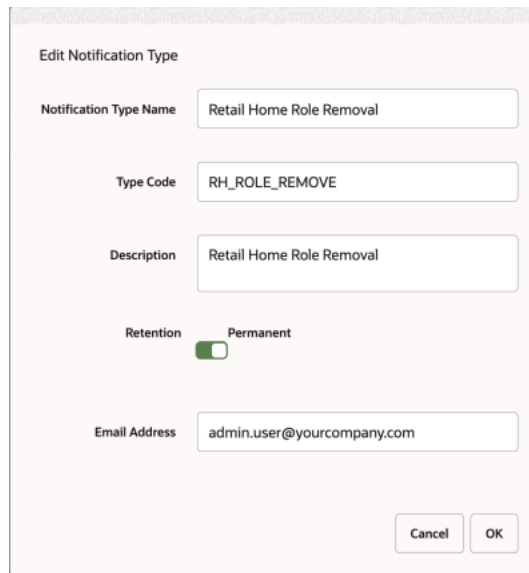
## Retail Home Application Navigator Setup

In order to create and display notifications for the Retail Home application a record representing the Retail Home application must be configured in the Application Navigator Setup page. This record must be configured with the "RH" application code and a valid Platform Service URL. Platform services are deployed with Retail Home, so the Platform Service URL should point to the platform services deployment within Retail Home. See the [Application Navigator Setup](#) chapter for details on using the Application Navigator Setup page.

## Role Request Approver Email

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

The role request and role removal approver emails can be configured from the Manage Notifications page, which can be accessed through the Settings menu (**Settings->Manage Notifications**).



The screenshot shows a web form titled "Edit Notification Type". It has several input fields and a toggle switch. The fields are: "Notification Type Name" with the value "Retail Home Role Removal", "Type Code" with "RH\_ROLE\_REMOVE", "Description" with "Retail Home Role Removal", "Retention" with a toggle switch set to "Permanent", and "Email Address" with "admin.user@yourcompany.com". At the bottom right, there are "Cancel" and "OK" buttons.

1. Select the Retail Home application from the Application options.
2. Select the **Retail Home Role Request** notification type and edit it to add an Email Address value.
3. Select the **Retail Home Role Removal** notification type and edit it to add an Email Address value.

# 12

## Resource Bundles

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

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

### Resources and Customizations Explained

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

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

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

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

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

### Tasks

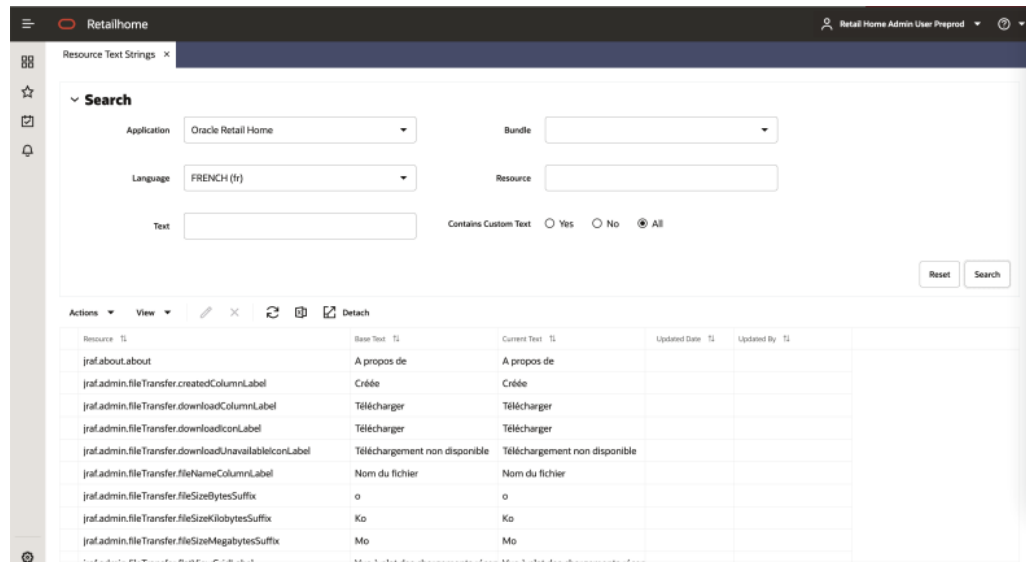
The Resource Bundles area of Retail Home consists of the following tasks.

- Resource Text Strings
- Imports Management

## Resource Text Strings

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

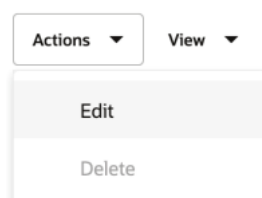
**Figure 12-1 Resource Text Strings Screen**



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

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

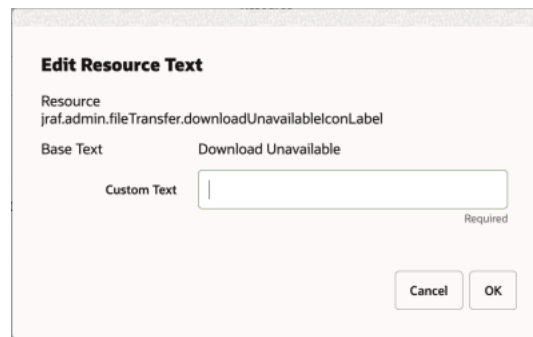
**Figure 12-2 Edit or Remove Custom Text**



## Add or Edit

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

**Figure 12-3 Edit Resource Text**



**Edit Resource Text**

Resource  
jraf.admin.fileTransfer.downloadUnavailableIconLabel

Base Text      Download Unavailable

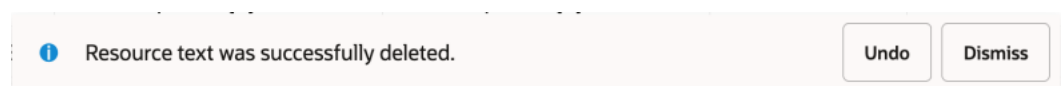
Custom Text       Required

Cancel      OK

## Remove Customization

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

**Figure 12-4 Delete Custom Text Snack Bar Notification**



## Export to Excel

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



 **Note:**

The **Export to Excel** action is disabled if the number of records is zero or greater than six hundred.

## Importing Customizations from a CSV File

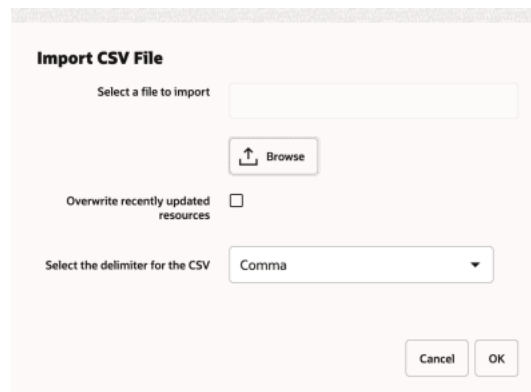
The user can change the values in the Text column of an exported CSV, and then import the CSV file through the Imports Management screen. See the section below titled [Imports Management](#) for more details about the Imports Management screen. When the user does this, the values of the Text column are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

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

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

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

**Figure 12-5** Import CSV File Dialog



It is possible that, after a user exports resources to a CSV file, but before the user imports the file through Retail Home, another user may customize one or more of the

exported resources. In this case, the values of resources in Retail Home would be newer than the values in the exported file. In order to ensure that an import does not inadvertently overwrite these values, the import action will skip resources that have been recently updated in Retail Home, and notify the user. The user can tell the import to instead use the values from the imported file by selecting the "Overwrite recently updated resources" checkbox on the import popup.

## Imports Management

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

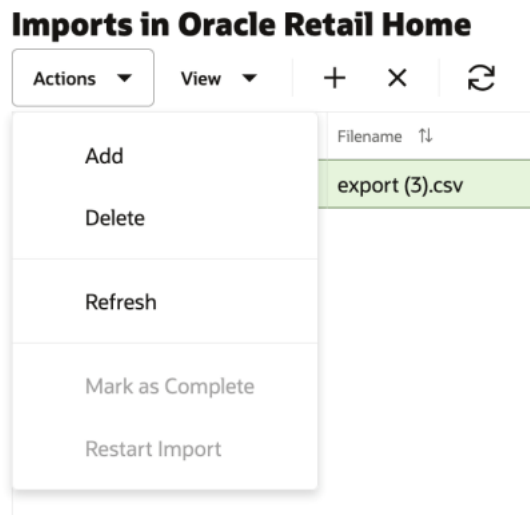
**Figure 12-6 Imports Management Screen**

The screenshot displays the Imports Management interface for two applications: Oracle Retail Home and Retail Insights. Each application's section includes a table of import actions with the following columns: Status, Errors, Filename, Created By, Created Date, Last Updated By, and Last Updated Date. The Oracle Retail Home section shows a successful import of 'export (3).csv' on 1/11/22. The Retail Insights section shows a failed import of 'exportData.csv' on 10/27/21.

Status	Errors	Filename	Created By	Created Date	Last Updated By	Last Updated Date
✓	0	export (3).csv	retail_home_admin	1/11/22 11:16:18 PM	retail_home_admin	1/11/22 11:16:18 PM
✗	0	exportData.csv	retail_home_admin	10/27/21 5:04:04 PM	retail_home_admin	10/27/21 5:04:04 PM

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

Figure 12-7 Imports Management Actions



## Create

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

## Delete

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

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

## Mark as Complete

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

## Restart Import

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

## View

When an import on the Imports Management screen is marked with status "Complete with Errors," this means that the import encountered errors with one or more of the

customizations in the imported file. In the table, the Errors column indicates the number of customizations that had errors. This number becomes a link that the user can click to view details for the customizations with errors. This takes the user to a modal page within Imports Management. See the section below titled [View Errors](#) for more details.

## View Errors

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

**Figure 12-8 View Errors Page**

Line	Base Application Code	Language	Bundle	Resource	Text	ErrorMessage
1	RI	en	21	CD_Retail_Insights_As-Is_Clusters_As-Is_Primary_Income_Level	Primary income level is the most promini	No matching resource was found for this record. Please
2	RI	en	21	CD_Retail_Insights_As-Is_Consumer_Group_Consumer_Income_I	This attribute indicates a consumer's incc	No matching resource was found for this record. Please
3	RI	en	21	CD_Retail_Insights_As-Is_Consumer_Group_Consumer_Segment	This attribute indicates a consumer's segm	No matching resource was found for this record. Please
4	RI	en	21	CD_Retail_Insights_As-Is_Consumer_Household_Group_Househc	This attribute lists the income for a house	No matching resource was found for this record. Please
5	RI	en	21	CD_Retail_Insights_As-Is_Consumer_Household_Group_Househc	This attribute lists the income level for a l	No matching resource was found for this record. Please
6	RI	en	21	CD_Retail_Insights_As-Is_Customer_Annual_Income	This is the customer's annual income.	No matching resource was found for this record. Please
7	RI	en	21	CD_Retail_Insights_As-Is_Customer_Customer_Income_Band	Indicate the range in which customer's in	No matching resource was found for this record. Please
8	RI	en	21	CD_Retail_Insights_As-Is_Customer_Household_Household_Inco	Income Group of a household.	No matching resource was found for this record. Please
9	RI	en	21	CD_Retail_Insights_As-Is_Customer_Household_Income	This attribute lists the income of a house	No matching resource was found for this record. Please
10	RI	en	21	CD_Retail_Insights_As-Is_Customer_Segment_Customer_Segment	This attribute defines target customer cat	No matching resource was found for this record. Please

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

## Edit

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

Figure 12-9 Edit Error Dialog

**Edit Error**

Base Application Code: R  
Enter 50 or fewer characters.

Language: AMERICAN (en)

Bundle: Retail\_Insights

Resource: CD\_Retail\_Insights\_As-Is\_Consumer\_Group\_C

Text: This attribute indicates a consumer's income r

Cancel OK

## Delete

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

## Export to CSV

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

## Important Considerations While Customizing Resources

When customizing resources:

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

# 13

## Seeding Application Dashboards

Retail Home provides two methods to seed configurations for applications. The first, discussed in [Application Navigator Setup](#), is to press the seed data button on the application navigator configuration screen. Additionally, data may be loaded in bulk by making direct calls to the seed service.

### Calling the Seed Service

The seed service exposes a single endpoint/seed that can be called with either GET or PUT methods. It is intended for use in migrating configurations, where adding apps individually would be slower.

Calling the endpoint with GET will return the entire configuration of the Retail Home instance. Calling the endpoint with PUT allows uploading the configuration in the same format.

### Seeding Behavior

The general behavior of the seed service is to merge configurations where possible. Most aspects of the configuration can be merged into existing settings. Some items cannot be matched to corresponding entries in the existing configuration however; in these cases the entire set of items will be replaced with the incoming configuration.

The following configurations will be replaced when loading seed data:

- Application role mappings
- Dashboard tile states for existing tiles
- Application filters

All other configurations will be merged with incoming data.

### Seed Data Format

The format for the seed data JSON is as follows:

#### Root

Property (*=required)	Type	Description
<b>applications</b>	Array	Array of Application objects to be configured
<b>tiles</b>	Array	Array of Tile objects to be configured
<b>dashboards</b>	Array	Array of Dashboard objects to be configured
<b>properties</b>	Array	Array of Property objects to be configured
<b>reports</b>	Array	Array of Report objects to be configured
<b>filters</b>	Array	Array of Filter objects to be configured

## Applications

Application entries represent applications registered with Retail Home.

Property (*=required)	Type	Description
<b>*name</b>	String	Name of the application to display in Retail Home. Must be unique.
<b>applicationCode</b>	String	Unique identifier for Retail applications. If the application does not exist it will be created.
<b>applicationType</b>	String	"JRAF" or "ARAF". Indicates which type of application this is when inserting a new application code. Defaults to "JRAF".
<b>*colorSetId</b>	String	Color set to use for the application in Retail Home. See below for supported values.
<b>*active</b>	Boolean	Whether the application is active. Inactive applications are not displayed in Retail Home.
<b>applicationLink</b>	String	The base URL to the application.
<b>platformService</b>	String	The base platform REST service endpoint for the application.
<b>roles</b>	Array	Array of Role objects the application is available to. Each role object has a single property containing the role name: <code>validRole</code> . When roles are enabled in Retail Home, this application will not be visible to other roles in application navigators after a publish.

## Tiles

Tiles define available tiles to be displayed on dashboards.

Property (*=required)	Type	Description
<b>*tileName</b>	String	The name of the tile to display in Retail Home. Must be unique.
<b>*tileColor</b>	String	The color to use for the tile. See below for supported colors.
<b>url</b>	String	The URL to launch when the tile header is clicked. Supports the <code>&lt;app.url&gt;</code> token when associated with an application, which indicates the tile will open relative to the application's <code>applicationLink</code> value.
<b>applicationName</b>	String	The name of the application this tile is associated with. Must be one of the applications defined in the seed data.

## Dashboards

Dashboard objects define the unique dashboard associated with a given role in Retail Home.

Property (*=required)	Type	Description
<b>*jobRoleName</b>	String	The job role the dashboard is for. Only one dashboard can be created per role.
<b>*active</b>	Boolean	Whether the dashboard is active. Inactive dashboards are not displayed in Retail Home.
<b>defaultDashboard</b>	Boolean	Whether the dashboard is the default. Default dashboards will be preferentially displayed when opening Retail Home.
<b>*tiles</b>	Array	Array of Dashboard Tile objects on the dashboard. May be empty.
<b>*regions</b>	Array	Array of Region objects on the dashboard. May be empty.

## Dashboard Tiles

Dashboard tiles define an instance of a tile object shown on a given dashboard.

Property (*=required)	Type	Description
<b>tileSize</b>	String	How much space to allocate to the tile. Supported values are "1x1" and "2x2".
<b>*active</b>	Boolean	Whether the tile is active. Inactive tiles will not be displayed in Retail Home
<b>*tileName</b>	String	The name of the tile being displayed. The name must be from the array of Tile objects in the seed data.
<b>*tileStates</b>	Array	Array of Tile States to display on the tile

## Tile States

Tile states are the individual data views on dashboard tiles. Each tile state refers to reports configured for the application and can show both a tile state and expanded report. Reports are drawn from those already configured for the Retail Home deployment.

Property (*=required)	Type	Description
<b>*tileStateConfigId</b>	String	ID of the tile state report to display
<b>reportName</b>	String	Name of custom report to display. Mutually exclusive with <code>tileStateConfigId</code> .
<b>expandedReportConfigId</b>	String	ID of the expanded report to display
<b>*active</b>	Boolean	Whether the tile state is active. Inactive tile states will not be displayed in Retail Home
<b>*urlConfigurations</b>	Array	Array of URL configurations configured as data sources for the tile state. No more than one active configuration per report type is allowed.
<b>contentFilters</b>	Array	Array of ContentFilter configurations mapping filters to corresponding tile states.



## Content Filters

Content filters are a mapping between filters and tile states. Each content filter associates an instance of a filter to a tile state.

Property (*=required)	Type	Description
<b>*filterName</b>	String	The name of the filter to apply. This must correspond to a filter provided in the current seed data.
<b>required</b>	Boolean	Whether the filter is required for this tile state. Defaults to false.

## Regions

Regions are the additional banner and contextual data view located above and beside the tiles in the dashboard. Reports are drawn from those already configured for the Retail Home deployment.

Property (*=required)	Type	Description
<b>*active</b>	Boolean	Whether the region is active. Inactive regions will not be displayed in Retail Home
<b>*reportConfigId</b>	String	ID of the report to display in this region
<b>*regionId</b>	String	Which region this configures. Valid options are "Primary", "Secondary", and "Banner". No more than one configuration per region is allowed on a dashboard
<b>*urlConfig</b>	UrlConfig	The URL configuration set as the data source for the region

## URL Configurations

URL configurations register the data sources for regions and tile states.

Property (*=required)	Type	Description
<b>*contentType</b>	String	Type of report this is configuring. Valid options are "region", "tilestate", "expanded", and "filter". Tilestate and expanded are only valid for tilestates. Region is only valid for regions. Filter is only valid for filters (see below)
<b>*resourceId</b>	String	ID of the service this URL configures.
<b>*resourceType</b>	String	What type of URL this is. Valid options are "REST", "FILE", and "LINK"
<b>*url</b>	String	The URL. FILE type URLs may use relative paths. REST and LINK URLs are strictly validated and must contain a protocol if they do not use replacement tokens (details below). Replacement tokens are only supported for tile states.
<b>*active</b>	Boolean	Whether this configuration is active. Inactive URL configurations are ignored by Retail Home.

## Properties

Properties are used to turn on/off specific functionality on Retail Home.

Property (*=required)	Type	Description
*propertyKey	String	Key defining the Retail Home functionality. Currently "oracle.retail.apps.retailhome.settings.appNavigator.enableRoles" is used to Enable/Disable Roles flag on 'Application Navigator Setup'.
*currentValue	Boolean	Whether this configuration is enabled.

## Reports

Reports are custom reports configured using templates in Retail Home.

Property (*=required)	Type	Description
*reportTemplateId	String	ID of the template for this report.
*reportName	String	Name of the report.
useLightBackground	Boolean	Whether to use a light background when displaying this report in a tile state. If false, the background will be drawn from the color set of the application.
*parameters	Array	Array of report parameters configuring this report. May be empty.

## Report Parameters

Report parameters are used to configure the template of a custom report. The available and required parameters depend on the template being configured.

Property (*=required)	Type	Description
*paramPath	String	ID of the parameter in the template
*paramType	String	Type of parameter. Valid options are "text" and "boolean".
*textValue	String	Value of the parameter as a string.

## Filters

Filter objects define filters associated with applications.

Property (*=required)	Type	Description
*applicationName	String	The name of the application this filter is associated with. Must be one of the applications defined in the seed data.
*paramName	String	Name of parameter. This is appended to the REST call along with the value.
*filterName	String	Display name of the filter.

Property (*=required)	Type	Description
<b>*filterType</b>	String	Type of the Filter. Value options are 'MULTISLCT', 'TOGGLECTRL', 'NUMINPUT', 'CHECKBOX' & 'RADIOBTN'.
<b>*active</b>	Boolean	Determines whether this filter is active.
<b>*urlConfig</b>	Object	The URL configuration set for this filter.
<b>options</b>	Array	An array of filter options
<b>translations</b>	Array	An array of translations for the filter

## Filter Translations

Translation objects provide localized strings for filters for a given application

Property (*=required)	Type	Description
<b>*applicationName</b>	String	Name of the application this translation is associated with. Must be one of the applications defined in the seed data.
<b>*paramName</b>	String	Parameter name this translation is associated with. The <code>paramName</code> must be defined in the <code>filters</code> block.
<b>*filterName</b>	String	Filter name this translation is associated with. The <code>filterName</code> must be defined in the <code>filters</code> block.
<b>options</b>	Array	An array of translated options
<b>*language</b>	String	Language to which the translation needs to be applied.
<b>*sourceLanguage</b>	String	Original language of the base filter

## Filter Options

Filter options store selectable options for filters that rely on a preset list rather than pulling options from elsewhere

Property (*=required)	Type	Description
<b>*optionName</b>	String	Name of the option to display in the UI
<b>*optionValue</b>	String	Value of the option to use when sending data
<b>*displayOrder</b>	Number	Order to display the option in the UI
<b>*language</b>	String	Language to which the translation needs to be applied. Not required for options on the parent Filter object.
<b>*sourceLanguage</b>	String	Original language of the base option. Not required for options on the parent Filter object.

## Internationalization

Internationalization is the process of creating software that can be translated easily. Changes to the code are not specific to any particular market.

Oracle Retail Home has been internationalized to support multiple languages.

## Translation

Translation is the process of interpreting and adapting text from one language into another. Although the code itself is not translated, components of the module that are translated may include the following, among others:

- Graphical user interface (GUI)
- Error messages

The following components are not translated:

- Documentation (Administration Guide, Release Notes, User Guide, and Security Guide)
- Batch programs and messages
- Log files
- Configuration tools
- Demonstration data
- Training materials

The user interface for the Oracle Retail Home has been translated into the following languages:

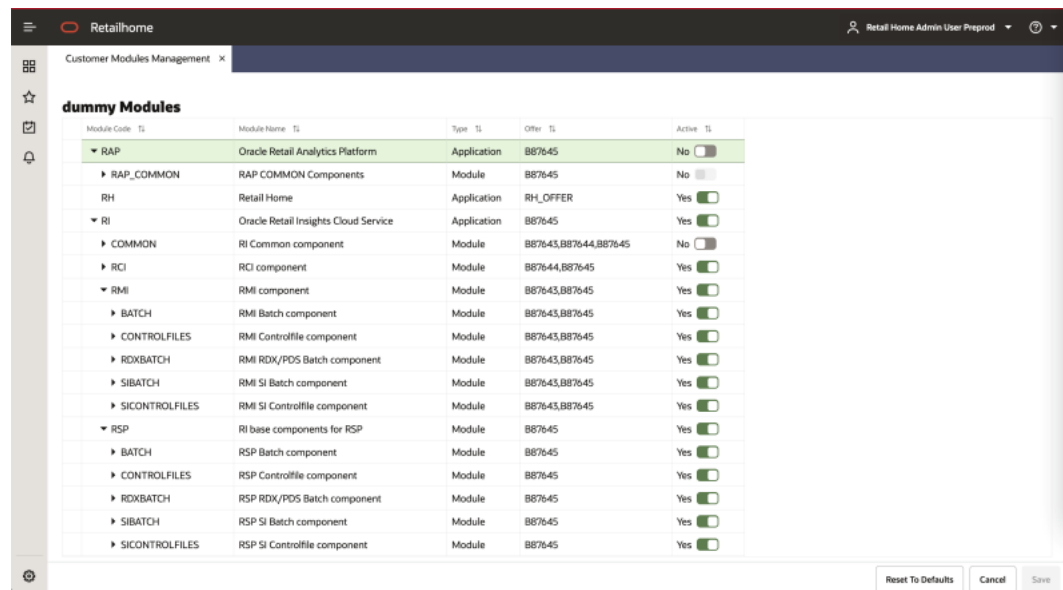
- Arabic (AR)
- German (DE)
- Greek (EL)
- Spanish (ES)
- French (FR)
- Croatian (HR)
- Hungarian (HU)
- Italian (IT)
- Japanese (JA)
- Korean (KO)
- Dutch (NL)
- Polish (PL)
- Portuguese (PT)
- Russian (RU)
- Swedish (SV)
- Turkish (TR)
- Chinese (ZH)

# 14

## Customer Module Management

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

Figure 14-1 Retail Home Customer Modules Management Page



The screenshot shows the 'Customer Modules Management' page in the Retail Home interface. The page title is 'Retailhome' and the user is 'Retail Home Admin User Preprod'. The page displays a table of modules under the heading 'dummy Modules'. The table has columns for Module Code, Module Name, Type, Offer, and Active. The 'Active' column contains toggle switches. The 'RAP' module is currently deactivated (No), while all other modules are activated (Yes).

Module Code	Module Name	Type	Offer	Active
▼ RAP	Oracle Retail Analytics Platform	Application	B876-45	No <input type="checkbox"/>
▶ RAP_COMMON	RAP COMMON Components	Module	B876-45	No <input type="checkbox"/>
RH	Retail Home	Application	RH_OFFER	Yes <input checked="" type="checkbox"/>
▼ RI	Oracle Retail Insights Cloud Service	Application	B876-45	Yes <input checked="" type="checkbox"/>
▶ COMMON	RI Common component	Module	B876-43,B876-44,B876-45	No <input type="checkbox"/>
▶ RCI	RCI component	Module	B876-44,B876-45	Yes <input checked="" type="checkbox"/>
▼ RMI	RMI component	Module	B876-43,B876-45	Yes <input checked="" type="checkbox"/>
▶ BATCH	RMI Batch component	Module	B876-43,B876-45	Yes <input checked="" type="checkbox"/>
▶ CONTROLFILES	RMI Controlfile component	Module	B876-43,B876-45	Yes <input checked="" type="checkbox"/>
▶ RDXBATCH	RMI RDX/PDS Batch component	Module	B876-43,B876-45	Yes <input checked="" type="checkbox"/>
▶ SIBATCH	RMI SI Batch component	Module	B876-43,B876-45	Yes <input checked="" type="checkbox"/>
▶ SICONTROLFILES	RMI SI Controlfile component	Module	B876-43,B876-45	Yes <input checked="" type="checkbox"/>
▼ RSP	RI base components for RSP	Module	B876-45	Yes <input checked="" type="checkbox"/>
▶ BATCH	RSP Batch component	Module	B876-45	Yes <input checked="" type="checkbox"/>
▶ CONTROLFILES	RSP Controlfile component	Module	B876-45	Yes <input checked="" type="checkbox"/>
▶ RDXBATCH	RSP RDX/PDS Batch component	Module	B876-45	Yes <input checked="" type="checkbox"/>
▶ SIBATCH	RSP SI Batch component	Module	B876-45	Yes <input checked="" type="checkbox"/>
▶ SICONTROLFILES	RSP SI Controlfile component	Module	B876-45	Yes <input checked="" type="checkbox"/>

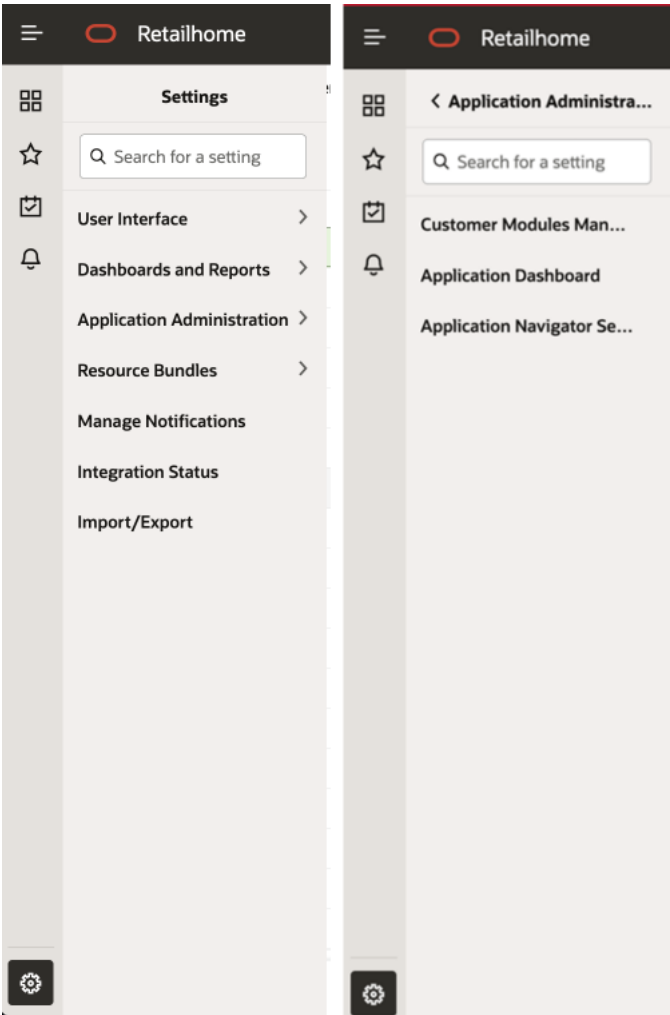
Applications and modules that are deactivated will not be accessible to users. Scheduled batch processes may also be halted when those processes are tied to deactivated applications and modules.

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

## Launching the Customer Modules Management Page

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

**Figure 14-2 Customer Modules Management Link within Retail Home's Settings Menu**



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

Only modules provisioned to the customer are displayed.

Figure 14-3 Retail Home Customer Modules Management Page

Module Code	Module Name	Type	Offer	Active
▼ RAP	Oracle Retail Analytics Platform	Application	B87645	No
▶ RAP_COMMON	RAP COMMON Components	Module	B87645	No
RH	Retail Home	Application	RH_OFFER	Yes
▼ RI	Oracle Retail Insights Cloud Service	Application	B87645	Yes
▶ COMMON	RI Common component	Module	B87643,B87644,B87645	No
▶ RCI	RCI component	Module	B87644,B87645	Yes
▼ RMI	RMI component	Module	B87643,B87645	Yes
▶ BATCH	RMI Batch component	Module	B87643,B87645	Yes
▶ CONTROLFILES	RMI Controlfile component	Module	B87643,B87645	Yes
▶ RDXBATCH	RMI RDX/PDS Batch component	Module	B87643,B87645	Yes
▶ SIBATCH	RMI SI Batch component	Module	B87643,B87645	Yes
▶ SICONTROLFILES	RMI SI Controlfile component	Module	B87643,B87645	Yes
▼ RSP	RI base components for RSP	Module	B87645	Yes
▶ BATCH	RSP Batch component	Module	B87645	Yes
▶ CONTROLFILES	RSP Controlfile component	Module	B87645	Yes
▶ RDXBATCH	RSP RDX/PDS Batch component	Module	B87645	Yes
▶ SIBATCH	RSP SI Batch component	Module	B87645	Yes
▶ SICONTROLFILES	RSP SI Controlfile component	Module	B87645	Yes

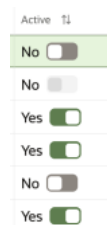
The columns include:

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

## Activating and Deactivating Customer Modules

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

Figure 14-4 Customer Modules Management Page's Toggle Components for Active Statuses



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

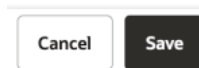
Toggling the active state of an application or module also toggles the state of child modules.

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

## Saving or Discarding Customer Module Changes

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

**Figure 14-5 Customer Modules Management page's Cancel and Save Buttons**



Once the changes are saved:

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

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

### Example Usage with POM:

POM Batches can be enabled/disabled using Retail Home CMM. The changes, once saved, are applied to the corresponding Platform Service deployment on the target app. The user then logs into the POM application, navigates to the "Batch Administration" page and clicks the "Sync with MDF" button. This initiates Platform Service calls between CMM & POM to sync the module status.

## Resetting Activation Status to Default

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

**Figure 14-6 Customer Modules Management Page's "Reset to Defaults" Button**



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



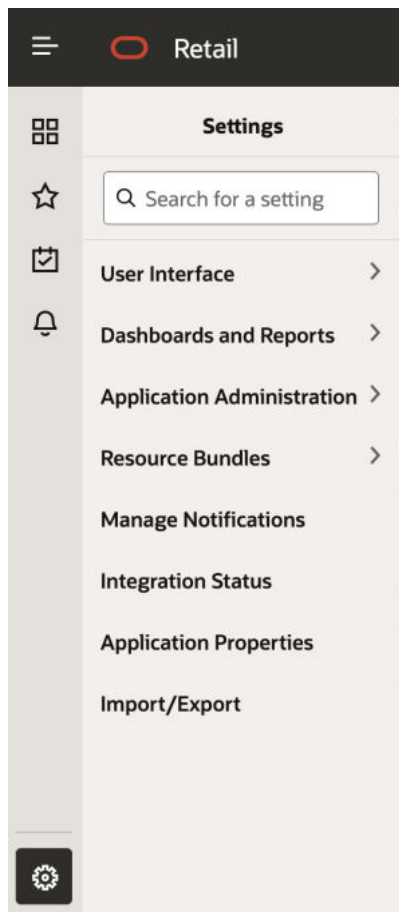
# 15

## Application Property Configuration

The Application Properties Configuration page gives customer administrators the ability to update the properties of Retail Home from the application.

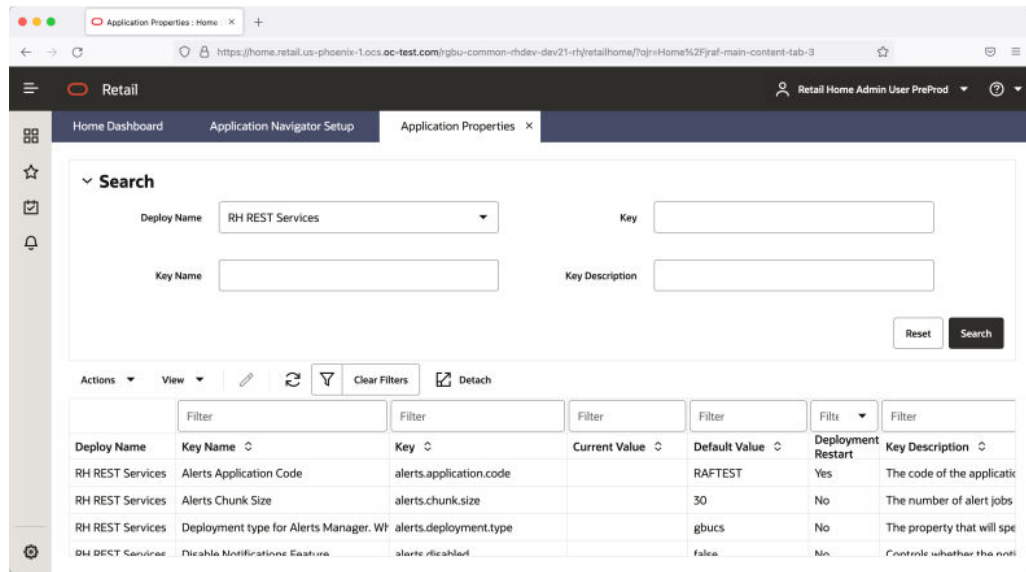
### Launching Application Property Configuration

The Application Properties page can be launched from the Retail Home Settings Menu.



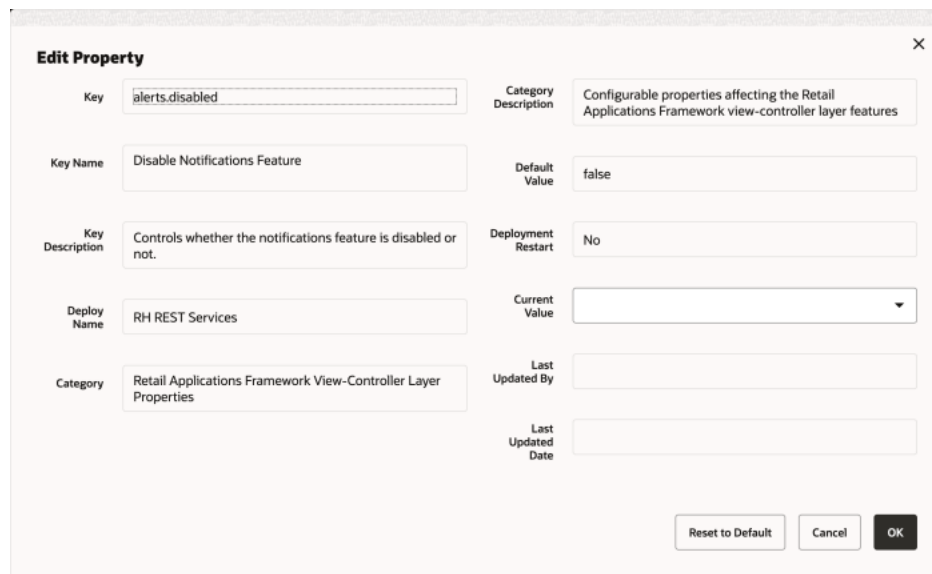
### Viewing Properties for an Application

To view properties, select the component from the Deploy Name dropdown menu and press the search button. Optionally, add additional search parameters to narrow the results returned. Retail Home properties are configured in RH Rest Services, while the remaining options are platform components.



## Modifying Properties for an Application

To modify properties for an application, select the property you wish to change from the list and press the edit button, or select "Edit" from the actions menu.



## Properties For Retail Home

The following properties can be set to configure components of Retail Home. Configuration of deployment names other than RH Rest Services, or properties besides these, should not be necessary and is beyond the scope of this documentation.

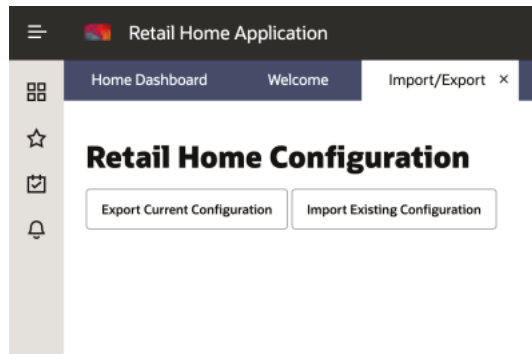
<b>Key</b>	<b>Description</b>
<code>obiee.service.url</code>	URL to BI WSDL (for example, <code>https://[bi_host]:[bi_port]/analytics-ws/saw.dll</code> )
<code>obiee.service.oauth.required</code>	Whether the BI integration requires OAuth to connect to

# 16

## Import / Export Configuration

The Import/Export Configuration page gives customer administrators the ability to import or export configurations such as Application, Custom Reports, Dashboard Configurations, and so on.

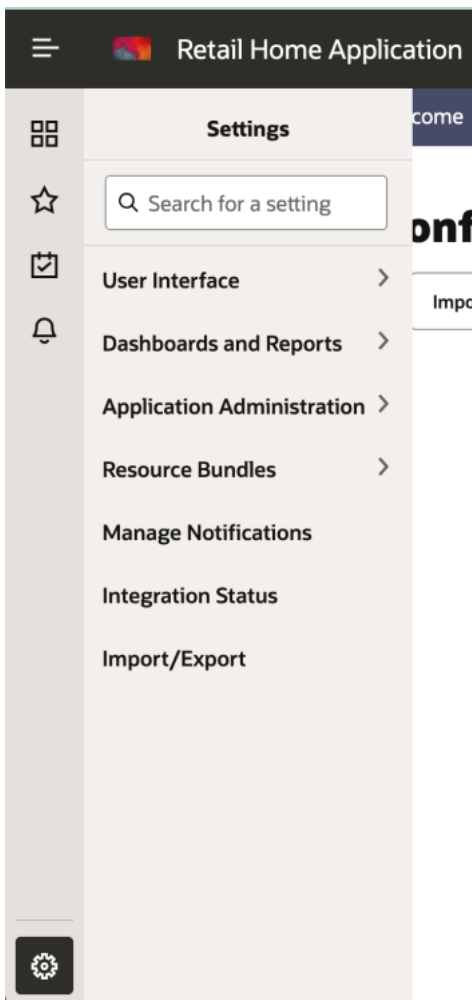
**Figure 16-1 Import/Export Configuration Page**



## Launching Import/Export Configuration

The Import/Export Configuration can be launched from the Retail Home Settings Menu.

Figure 16-2 'Import/Export' Option in Settings Menu



## Export Current Configuration

The **Export Current Configuration** option exports the configurations in the form of a JSON file. This JSON file can be used to import the same configuration into another Retail Home application.

Figure 16-3 Export Current Configuration Pop-up Window

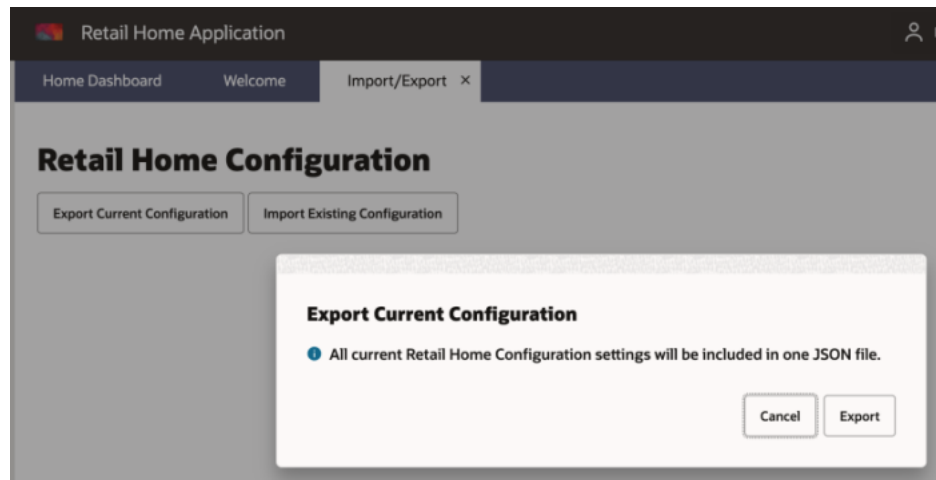
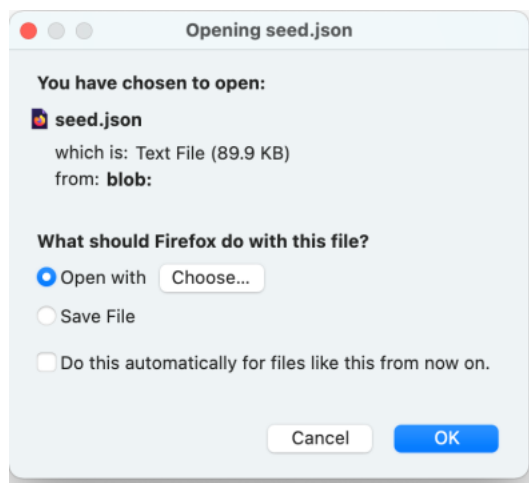


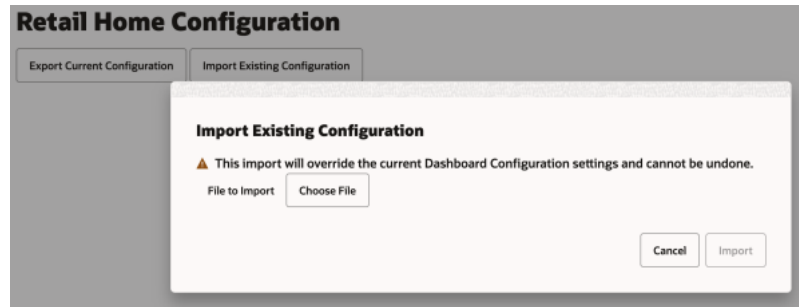
Figure 16-4 Open or Save Exported Configuration JSON File



## Import Existing Configuration

The **Import Current Configuration** option imports configuration settings from a JSON file. This import overrides the current configuration settings and cannot be undone.

Figure 16-5 Import Existing Configuration Popup Window



# 17

## Env Updates

The Env updates functionality gives the Retail Home patch administrator the ability to upgrade an application to a newer version.

The **Env Updates** tab is displayed on the **Details and Updates** contextual pane, which can be accessed by clicking the **View Version History** link for the applicable cloud service on the Application Dashboard page.

The **Env Updates** tab is only visible to users who have been assigned the `RH_PATCH_ADMIN` role.

Figure 17-1 Env Updates Tab

**Details and Updates** ×

Version Details **Env Updates**

**Service Update Manager**

Current Version  
22.1.101.0

**Available Versions**  
23.1.201.0.0123

Planned Outage Time **8 Hours**      Patch Average Time **8 Hours**

Planned Start Date and Time

**Request For Planned Patch**



## Patch Request

The user can request an upgrade to a version that is greater than the one currently installed using the **Request for Planned Patch** button.

The required fields for requesting a patch are:

- Version number (from the **Available Versions** dropdown)
- Planned Start Date and Time

The **Planned Start Date and Time** must be set to a value in the future.

Once a patch request is successfully created, the status of the request would be appended to the corresponding version in the **Available Versions** dropdown. The possible statuses are **Accepted**, **Pending Approval**, **Rejected**, and **Scheduled**. The **Request For Planned Patch** button would be disabled at this point and would only be enabled if the patch request is Rejected.

Figure 17-2 Status Display After Requesting a Patch

### Details and Updates ×

Version Details **Env Updates**

---

#### Service Update Manager ↻

Current Version  
22.1.101.0

Available Versions  
23.1.101.0.1022-Pending Approval ▾

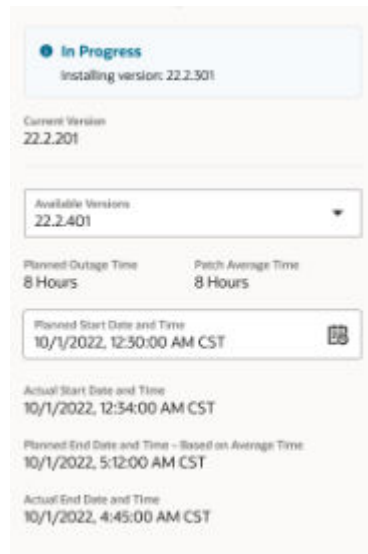
Planned Outage Time 8 Hours	Patch Average Time 8 Hours
--------------------------------	-------------------------------

Planned Start Date and Time  
02/06/2023, 05:00:00 PM CST 📅

Request For Planned Patch

Once the patch run is kicked off, the status will no longer be appended to the version and instead would be displayed in a status bar along with version name.

**Figure 17-3 In Progress Patch with Status Bar**



The **Request for Patch Button** would only be enabled for the version once the patch is completed (with or without errors/warnings).

The completed patch run would have the following additional details.

- Actual Start Date and Time
- Actual End Date and Time

Figure 17-4 Completed Patch Run with Error Display

## Details and Updates ✕

Version Details Env Updates

---

### Service Update Manager ↻

**Error**  
Installing Version: 22.1.402.0.1022

Current Version  
22.1.101.0

Available Versions  
22.1.402.0.1022

Planned Outage Time 8 Hours	Patch Average Time 8 Hours
--------------------------------	-------------------------------

Planned Start Date and Time  
01/31/2023, 12:00:00 AM CST 📅

Actual Start Date and Time

Planned End Date and Time - Based on Average Time  
01/31/2023, 08:00:00 AM CST

Actual End Date and Time  
02/08/2023, 08:16:54 PM CST

[Request For Planned Patch](#)

# A

## Appendix: Report Data Requirements

Retail Home can be configured to pull data for reports and custom reports from REST services or from a BI Analysis. This appendix describes the data structures required for the returned payloads.

### Common Request Values

#### Username Headers

External calls from Retail Home Server to remote data services are routed through WTSS and IDCS, which append additional headers to the request object. The following headers can be used to fetch the username at the destination endpoint.

Property	Type	Description
idcs_remote_user	String	User name set in IDCS
remote_user	String	User name set in IDCS

### Common Response Values

This section describes the valid values for certain properties that are commonly used in the response payloads described in the following sections.

The following table describes the supported values for the Value Format (valueFormat) property:

**Table A-1 Value Format**

Format Value	Meaning	Example
<b>PC</b>	Percent	Formats 0.045 as 4.5%
<b>S</b>	Short Number	Formats 9950000 as 9.95M
<b>N</b>	Number	Formats 1234567.89 as 1,234,567.89
<b>(empty)</b>	No Formatting	0.045 displays as 0.045

The following table describes the supported values for the Indicator property:

**Table A-2 Indicator**

Indicator Value	Meaning
<b>up</b>	An upward pointing arrow
<b>down</b>	A downward pointing arrow

Table A-2 (Cont.) Indicator

Indicator Value	Meaning
<b>normal</b>	A normal severity indicator.
<b>info</b>	An info severity indicator
<b>important</b>	An important severity indicator
<b>critical</b>	A critical severity indicator

## REST Service Response Payloads

All REST services should return data in a JSON format. The following sections describe the JSON structure of various objects included in a response payload and the specific response payload required for each report type.

### JSON Response Objects

This section defines various response objects that will be referenced in the following section when describing required response payloads for each report.

#### Metric Item

Property	Type	Required	Description
name	String	Y	Name of the metric.
value	Number	Y	Value of the metric.
valueFormat	String	N	Format for the value. The following formats are supported: <ul style="list-style-type: none"> <li>PC - Percent (.01 = 1%)</li> <li>S - Short (1000 = 1K)</li> <li>N - Number (1000 = 1,000)</li> </ul>
valueLabel	String	N	An additional label to display below the value
indicator	String	N	An indicator to display next to the value. The supported options are "up", "down", "normal", "info", "important", and "critical".

#### Metric Chart

Property	Type	Required	Description
type	String	Y	Type of chart to display: "line", "bar", "area", or "total"
title	String	N	Title to display above chart

Property	Type	Required	Description
items	Array	Y	Data for the chart. Each object contains "value" and "name" fields. An optional "series" field can be included to support multiple series.
renderTooltips	Boolean	N	Hide or show tooltips on the chart. Default true.
seriesName	String	N	The name of the series the item belongs to. It is displayed as a tooltip label for the series. Applies to line, bar, and area charts. (Can be used when there is a single series.)
valueFormat	String	N	Formats the output of values in the chart. Takes the same values as for metrics items.
valueLabel	String	N	Prefix for values. Applies to total charts only.
valueUnits	String	N	Suffix for values. Applies to total charts only.
xAxisTitle	String	N	Label for the X-axis. Applies to line, bar, and area charts.
renderXAxisLabels	Boolean	N	Show or hide tick labels on the X-axis. Applies to line, bar, and area charts.
yAxisTitle	String	N	Label for the Y-axis. Applies to line, bar, and area charts.
renderYAxisLabels	Boolean	N	Show or hide tick labels on the Y-axis. Applies to line, bar, and area charts.
initialScrollPosition	String	N	Which end of the chart to start at if there are too many items to show at once. Options are "first" and "last", defaults to "first". Applies to line, bar, and area charts.
renderLegend	Boolean	N	Show or hide legend or label at the bottom of the chart. Applies to line, bar and area charts.
y2AxisTitle	String	N	Label for the Y2-axis (right side of the chart). Applies to line, bar and area charts.
y2SeriesId	String	N	Value of the series corresponding to the Y2 Axis Title that needs to be shown in the chart. Applies to line, bar and area charts.

## Table Metric Config

Property	Type	Required	Description
name	String	Y	Name of the metric.

Property	Type	Required	Description
threshold	Object	N	Object with numeric properties "min" and "max" values (both optional). Metric values less than the "min" value will be displayed in Red. Metric values greater than the "max" value will be displayed in Green.
valueFormat	String	N	Format for the value. The following formats are supported: <ul style="list-style-type: none"> <li>• PC - Percent (.01 = 1%)</li> <li>• S - Short (1000 = 1K)</li> <li>• N - Number (1000 = 1,000)</li> </ul>

## Table Headers Config

Property	Type	Required	Description
image	String	N	Column header label for image column. (Required for table reports that display an image)
descriptors	Array	N	Array containing one or two String values defining the column header labels for the descriptor column(s).
metrics	Array	N	Array containing one to three <a href="#">Table Metric Config</a> objects used to configure column header labels, value formatting and value thresholds for each Metric column.

## Table Item

Property	Type	Required	Description
image	String	N	URL of the image to display. Ignored if the table report does not display an image.
descriptors	Array	Y	Array containing one or two String values defining descriptor values to display for this item. (Should match the number of descriptors defined in the <a href="#">Table Headers Config</a> )
metrics	Array	Y	Array containing one to three Numeric values for this item. (Should match the number of metrics defined in the <a href="#">Table Headers Config</a> )

## JSON Report Payloads

This section describes the required response payload for each report and will reference [JSON Response Objects](#) above for details.

## Metric Only Reports

This category includes the following reports:

- Two Metric Summary
- Eight Metric Summary
- Twelve Metric Summary

And the following report templates:

- Two Metric Summary
- Twelve Metric Summary
- Eight Metric Summary
- RPAS Two Metric Summary
- RPAS Twelve Metric Summary

The REST service should return a JSON object with the following properties:

Property	Type	Required	Description
items	Array	Y	An array of <a href="#">Metric Item</a> objects to display on the tile. Up to twelve metric items may be returned; some reports will display fewer.

Example response payload for Two Metric Summary:

```
{
  "items": [{
    "name": "Metric 1",
    "value": 10000,
    "valueFormat": "S"
  }, {
    "name": "Metric 2",
    "value": 0.5,
    "valueFormat": "PC"
  }]
}
```

## Metric Chart Reports

This category includes the following reports:

- Four Metric Summary
- Five Metric Summary
- Six Metric Summary

And the following report templates:

- Four Metric Summary
- Five Metric Summary
- Six Metric Summary



- RPAS Four Metric Summary
- RPAS Six Metric Summary

The REST service should return a JSON object with the following properties:

Property	Type	Required	Description
items	Array	Y	An array of <a href="#">Metric Item</a> objects to display on the tile. Up to six metric items may be returned; some reports will display fewer.
chart	Object	N	A <a href="#">Metric Chart</a> object defining a chart to be displayed below the metrics.

Example response payload for Four Metric Summary:

```
{
  "items": [{
    "name": "Metric 1",
    "value": 10000,
    "valueFormat": "S"
  }, {
    "name": "Example",
    "value": 0.5,
    "valueFormat": "PC"
  }],
  "chart": {
    "type": "bar",
    "items": [{
      "name": "JAN",
      "series": "2021",
      "value": 4300000
    }, {
      "name": "FEB",
      "series": "2021",
      "value": 2230000
    }, {
      "name": "JAN",
      "series": "2022",
      "value": 3500000
    }, {
      "name": "FEB",
      "series": "2022",
      "value": 4500000
    }
  ],
  "renderTooltips": true,
  "valueFormat": "S",
  "renderXAxisLabels": true,
  "renderYAxisLabels": true
}
}
```

Example response payload for Five Metric Summary:

```
{
  "items": [
    {
      "name": "Metric 1",
      "value": 1
    }
  ]
}
```

```
    },
    {
      "name": "Metric 2",
      "value": 2
    },
    {
      "name": "Metric 3",
      "value": 3
    },
    {
      "name": "Metric 4",
      "value": 4
    },
    {
      "name": "Metric 5",
      "value": 5
    }
  ],
  "chart": {
    "type": "bar",
    "title": "Title",
    "items": [
      {
        "id": 0,
        "series": "Series-1",
        "name": "Series 1 Name",
        "value": 10
      },
      {
        "id": 1,
        "series": "Series-1",
        "name": "Series 1 Name",
        "value": 11
      },
      {
        "id": 0,
        "series": "Y2-Series ID",
        "name": "Y2-Series-Name",
        "value": 20
      },
      {
        "id": 1,
        "series": "Y2-Series ID",
        "name": " Y2-Series-Name",
        "value": 21
      },
      {
        "id": 0,
        "series": "Series-3",
        "name": "Series 3 Name",
        "value": 30
      },
      {
        "id": 1,
        "series": "Series-3",
```

```

        "name": "Series 3 Name",
        "value": 31
    }
],
"renderTooltips": "true",
"valueFormat": "S",
"xAxisTitle": "X-Axis Title",
"renderXAxisLabels": "true",
"yAxisTitle": "Y-Axis Title",
"renderYAxisLabels": "true",
"initialScrollPosition": "first",
"y2AxisTitle": "Y2-Axis Title",
"y2SeriesId": "Y2-Series ID",
"renderLegend": true
}
}

```

## Table Reports

This category includes the following reports:

- Image Metric Table
- Image Table
- Metrics Table

And the following report templates:

- Image Metrics Table
- Image Table
- Metrics Table
- RPAS Image Metrics Table
- RPAS Image Table
- RPAS Metrics Table

The REST service should return a JSON object with the following properties:

Property	Type	Required	Description
name	String	Y	The report name.
headers	Object	Y	A <a href="#">Table Headers Config</a> object defining the structure of the report.
items	Array	Y	An array of <a href="#">Table Item</a> objects representing the data to populate the report.

Example response payload for Two Metric Summary:

```

{
  "name": "Top Selling by Margin",
  "headers": {
    "image": "Image",
    "descriptors": ["Name", "ID"],

```

```

    "metrics": [{
      "name": "Sales",
      "threshold": {
        "max": 700000000,
        "min": 10000000
      },
      "valueFormat": "S"
    }]
  },
  "items": [
    {
      "image": "http://my.image.url",
      "descriptors": ["Color Block Sundress", "10001003"],
      "metrics": ["854300234"]
    }, {
      "image": "",
      "descriptors": ["Color Item FULL ROW", "10001323"],
      "metrics": ["1235436234"]
    }, {
      "image": "",
      "descriptors": ["eqwtge", "10001323"],
      "metrics": ["1235436234"]
    }
  ]
}

```

## ORASE Reports

This category includes the following reports:

- Demand Transference
- Orase Offer Optimization

The REST service should return a JSON object with the following properties:

Property	Type	Required	Description
items	Array	Y	An array of <a href="#">Metric Item</a> objects to display on the tile. Up to twelve metric items may be returned; some reports will display fewer.

Example response payload for Demand Transference:

```

{
  "items": [
    {
      "name": "Version",
      "value": "CS_DT"
    },
    {
      "name": "Stage",
      "value": "Calculation"
    },
    {
      "name": "Status",
      "value": "Completed"
    }
  ]
}

```

```

    },
    {
      "name": "Status Color",
      "value": "Green"
    },
    {
      "name": "Heading",
      "value": "Transferable Demand"
    },
    {
      "name": "Min",
      "value": "0.1",
      "valueFormat": "PC"
    },
    {
      "name": "Avg",
      "value": "0.7",
      "valueFormat": "PC"
    },
    {
      "name": "Max",
      "value": "1",
      "valueFormat": "PC"
    }
  ]
}

```

Example response payload for ORASE Offer Optimization:

```

{
  "items": [
    {
      "name": "Revenue",
      "value": 11902000,
      "valueFormat": "S"
    },
    {
      "name": "vs2022",
      "value": 0.1665,
      "valueFormat": "PC",
      "indicator": "up"
    },
    {
      "name": "Sell Through",
      "value": 0.8953,
      "valueFormat": "PC"
    },
    {
      "name": "vs2022",
      "value": 0.0363,
      "valueFormat": "PC",
      "indicator": "up"
    }
  ]
}

```

```

        "name": "Gross Margin",
        "value": 45960000,
        "valueFormat": "S"
    },
    {
        "name": "vs2022",
        "value": -0.0621,
        "valueFormat": "PC",
        "indicator": "down"
    }
]
}

```

## BI Analysis Payloads

The following sections describe the row structure of various objects included in a BI response payload and the specific BI response payload(s) required for each report type.

## BI Response Layout

This section defines various response layouts that will be referenced in the following section when describing required response analyses for each report.



### Note:

If a column below has **N** in the Required column, this means the value can be empty, but the column still needs to be present in the response.

## BI Simple Metric

Column	Property	Type	Required	Description
0	Metric Name	String	Y	Name of the metric.
1	Metric Value	Number	Y	Value of the metric.
2	Value Format	String	N	Format for the value. The following formats are supported: <ul style="list-style-type: none"> <li>PC - Percent (.01 = 1%)</li> <li>S - Short (1000 = 1K)</li> <li>N - Number (1000 = 1,000)</li> </ul>
3	Value Label	String	N	An additional label to display below the value.

## BI Metric

Column	Property	Type	Required	Description
0	Metric Name	String	Y	Name of the metric.

Column	Property	Type	Required	Description
1	Metric Value	Number	Y	Value of the metric.
2	Value Format	String	N	Format for the value. The following formats are supported: <ul style="list-style-type: none"> <li>• PC - Percent (.01 = 1%)</li> <li>• S - Short (1000 = 1K)</li> <li>• N - Number (1000 = 1,000)</li> </ul>
3	Value Label	String	N	An additional label to display below the value
4	Indicator	String	N	An indicator to display next to the value. The supported options are "up", "down", "normal", "info", "important", and "critical".

## BI Metric Chart Config

Column	Property	Type	Required	Description
0	Chart Type	String	Y	Type of chart to display: "line", "bar", "area", or "total"
1	Chart Title	String	N	Title to display above chart
2	Render Tooltips	Boolean	N	Hide or show tooltips on the chart. Default true.
3	Series Name	String	N	Label displayed in tooltip. Applies to line, bar, and area charts.
4	Value Format	String	N	Formats the output of values in the chart. Takes the same values as for metrics items.
5	Value Label	String	N	Prefix for values. Applies to total charts only.
6	Value Units	String	N	Suffix for values. Applies to total charts only.
7	X-Axis Title	String	N	Label for the X-axis. Applies to line, bar, and area charts.
8	Render X-Axis Labels	Boolean	N	Show or hide tick labels on the X-axis. Applies to line, bar, and area charts.
9	Y-Axis Title	String	N	Label for the Y-axis. Applies to line, bar, and area charts.
10	Render Y-Axis Labels	Boolean	N	Show or hide tick labels on the Y-axis. Applies to line, bar, and area charts.
11	Initial Scrolling Position	String	N	Which end of the chart to start at if there are too many items to show at once. Options are "first" and "last", defaults to "first". Applies to line, bar, and area charts.

Column	Property	Type	Required	Description
12	Render Legend	Boolean	N	Show or hide legend or label at the bottom of the chart. Applies to line, bar and area charts.
13	Y2 – Axis Title	String	N	Label for the Y2-axis (right side of the chart). Applies to line, bar and area charts.
14	Y2 – Series ID	String	N	Value of the series corresponding to the Y2 Axis Title that needs to be shown in the chart. Applies to line, bar and area charts.

## BI Metric Chart Item

Each BI Metric Chart Item represents a value displayed in a chart (bar, line, area, total).

Column	Property	Type	Required	Description
0	Item Value	Number	Y	Value of the item.
1	Item Name	String	Y	Name of the item.
2	Item Series	String	Y	Series Name of the item.

## BI Table Config

Column	Property	Type	Required	Description
0	Report Name	String	Y	Name of the report.
1	Image Column Header Label	String	N	Column header label for images.
2	Descriptor 1 Name	String	Y	Column header label for first descriptor.
3	Descriptor 2 Name	String	N	Column header label for second descriptor.
4	Metric 1 Name	String	Y	Column header label for first metric.
5	Metric 1 Value Format Code	String	Y	Value format code for first metric.
6	Metric 1 Max Threshold	Number	N	Metric 1 values greater than the Metric 1 Max Threshold value will be displayed in Green.
7	Metric 1 Min Threshold	Number	N	Metric 1 values less than the Metric 1 Min Threshold value will be displayed in Red.
8	Metric 2 Name	String	Y	Column header label for second metric.
9	Metric 2 Value Format Code	String	Y	Value format code for second metric.



Column	Property	Type	Required	Description
10	Metric 2 Max Threshold	Number	N	Metric 2 values greater than the Metric 2 Max Threshold value will be displayed in Green.
11	Metric 2 Min Threshold	Number	N	Metric 2 values less than the Metric 2 Min Threshold value will be displayed in Red.
12	Metric 3 Name	String	Y	Column header label for third metric.
13	Metric 3 Value Format Code	String	Y	Value format code for third metric.
14	Metric 3 Max Threshold	Number	N	Metric 3 values greater than the Metric 3 Max Threshold value will be displayed in Green.
15	Metric 3 Min Threshold	Number	N	Metric 3 values less than the Metric 3 Min Threshold value will be displayed in Red.

## BI Table Item

Column	Property	Type	Required	Description
0	Image URL	String	N	URL of image to display
1	Descriptor 1 Value	String	Y	Value for first descriptor.
2	Descriptor 2 Value	String	N	Value for second descriptor.
3	Metric 1 Value	Number	Y	Value for first metric.
4	Metric 2 Value	Number	N	Value for second metric.
5	Metric 3 Value	Number	N	Value for third metric.

## BI Report Analyses

This section describes the required analyses for each report and will reference the [BI Response Layout](#) above for details.

## BI Two Metric Report

This category includes the following report template:

- BI Two Metric Summary

**Table A-3 Required Analysis**

Template Parameter	Response Layout	Repeat within row	Rows	Columns
BI Analysis Catalog Location	BI Simple Metric	up to 2	1	4 to 8

## BI Twelve Metric Report

This category includes the following report template:

- BI Two Metric Summary

**Table A-4 Required Analysis**

Template Parameter	Response Layout	Repeat within row	Rows	Columns
BI Analysis Catalog Location	BI Metric	Up to 12	1	5 to 6

## BI Metric Chart Reports

This category includes the following report templates:

- BI Four Metric with Chart Template
- BI Six Metric with Chart Template

**Table A-5 Required Analyses**

Template Parameter	Response Layout	Repeat within row	Rows	Columns
BI Metrics Analysis Catalog Location	BI Metric	up to 4/6	1	5 to 20/30
BI Chart Configuration Analysis Catalog Location	BI Metric Chart Config	No	1	13
BI Chart Items Analysis Catalog Location	BI Metric Chart Item	No	Many	2

## BI Table Reports

This category includes the following report templates:

- BI Metrics Table Template
- BI Image Table Template
- BI Image Metrics Template

**Table A-6 Required Analyses**

Template Parameter	Response Layout	Repeat within row	Rows	Columns
BI Table Headers Analysis Catalog Location	BI Table Config	No	1	up to 16
BI Table Items Analysis Catalog Location	BI Table Item	No	Many	up to 6

 **Note:**

All the report templates listed above require the same analyses using the same column layout, but some columns are not used in some reports. The BI Metrics Table Template will ignore the image related columns. The BI Image Table Template will ignore the values and configuration for the second and third metrics. If ignored columns are at the end of the row (such as metrics) they can be left out of the response.

# B

## Appendix: Using Retail Home Services to Retrieve Exported OAS Reports

OAS allows exporting reports to Object Storage in cloud environments. Retail Home and Platform Services can be used to download these exported reports by creating a PAR URL to access them.

### Setting up the PAR

Creating the PAR requires making a REST call to Platform Services. This requires setting up an OAuth client for authentication.

### Creating the OAuth Client

The OAuth client can be created using the Manage OAuth Clients screen in Retail Home.

Calling Platform Services deployed with Retail Home requires a scope of the form `rgbu:rh:services-RH-<ENV>`. ENV is the environment type and index of the Retail Home environment (for example, PRD1). If you're not sure, this value can be found in the Retail Home URL, which will be of the form `/rgbu-common-<customer>-<env>-rh/retailhome`. (for example, in the URL `https://home.retail.us-phoenix-1.ocs.oc-test.com/rgbu-common-rhdev-dev99-rh/retailhome`, the environment home is DEV99)

Create a new OAuth client with the required scope and record the client ID and client secret returned by Retail Home. The name and description for the new client can be set to anything as long as the name isn't already in use.

### Calling Platform Services

#### Get OAuth Access Token

Calling Platform Services requires first getting the OAuth access token from IDCS. This requires making a POST call to IDCS at the following endpoint:

```
https://<idcs host>/oauth2/v1/token
```

The IDCS host can be found in the login page URL. For example, for `https://idcs-ca69887b7ea4451ebdf967e2a383629e.identity.c9dev2.oc9qadev.com/ui/v1/sigsig`, the endpoint is `https://idcs-ca69887b7ea4451ebdf967e2a383629e.identity.c9dev2.oc9qadev.com/oath2/v1/token`

The call should use basic authorization with the client ID and client secret for your created OAuth client as the username and password. The payload of the request is as follows, substituting the same scope as in the previous step:

```
grant_type=client_credentials&scope=<scope>
```

Set the content-type header to `application/x-www-form-urlencoded`.

The response will be in JSON format. Copy the value of the `access_token` field for use in the next step.

## Call the Platform Services Endpoint

To create the PAR, make a POST call to `/RetailAppsPlatformServices/services/private/dis/createpar/{tenantId}`. You can get the full URL by looking up Retail Home's Platform Service URL on the Application Navigator Config screen, and the tenant ID can be found in the URL for BI Publisher.

### Example

Retail Home has a Platform Service URL of `https://home.retail.us-ashburn-1.ocs.oraclecloud.com/rgbu-common-rhdev-dev99-rh/RetailAppsPlatformServices`

BI Publisher is located at `https://rgbu.gbua.ocs.oc-test.com/fn9tojyo1js4rhhzwqx0/xmlpserver`.

The POST call will go to `https://home.retail.us-ashburn-1.ocs.oraclecloud.com/rgbu-common-rhdev-dev99-rh/RetailAppsPlatformServices/services/private/dis/createpar/fn9tojyo1js4rhhzwqx0`

Set the following headers for the request:

- Authorization: Bearer <access token>
- Accept-Language: en-US

The request payload is a JSON object with the following fields:

Property	Type	Required	Description
<code>disUrl</code>	String	Y	Host URL for BI Publisher
<code>name</code>	String	Y	Name for the PAR
<code>dateExpires</code>	String	Y	Expiration date for the PAR. Must be in the future. Uses the format YYYY-MM-DD
<code>objectName</code>	String	Y	Path to the object in Object Storage. Will be provided by customer.

### Example JSON

```
{
  "disUrl": "https://rgbu.gbua.ocs.oc-test.com",
  "name": "Example",
  "dateExpires": "2025-01-31",
  "objectName": "home/1000/example.pdf"
}
```

The `disUrl` field can be taken from the BI Publisher URL. For example, **https://rgbu.gbua.ocs.oc-test.com/fn9tojoyo1js4rhzhwqx0/xmlpserver** results in a `disUrl` of `https://rgbu.gbua.ocs.oc-test.com`.

The response from Platform Services will be a JSON message with a URL field. The returned URL can be used to download the report from Object Storage.

An example response:

```
{
  "status": "Success",
  "id": "ABC123ZMMmpnNSI8FcE13FqcN2e5gf6Wl4XvWXt5nVfWBoj24PNyZV3a2k/home/1000/example.pdf",
  "url": "https://objectstorage.us-phoenix-1.oraclecloud.com/p/ABC123ABC123ABC123ABC123ABC123/n/oraclegbudevcorp/b/cds_gbua_cndevcorp_rgbu_rgbu_q8qolpw40tamqx8nfp6_RGBU_DEV56_1/o/home/1000/example.pdf"
}
```