

Oracle® Retail Home

User Guide



Release 24.1.101.0

F90433-02

February 2024

ORACLE®

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Preface

This Administration Guide provides critical information about the processing and operating details of the Retail Analytics Platform, 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 the Retail Analytics Platform processes and interfaces

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- Exact error message received
- Screen shots of each step you take

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Oracle Retail Cloud Services and Business Agility

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

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

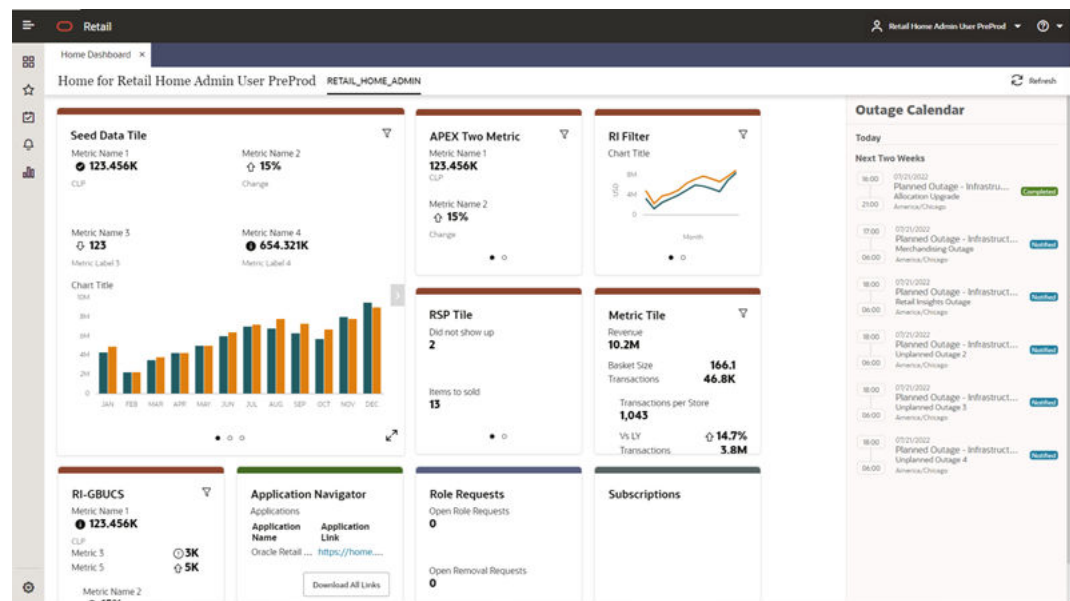
Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

1

Home Dashboard

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

Figure 1-1 Home Dashboard



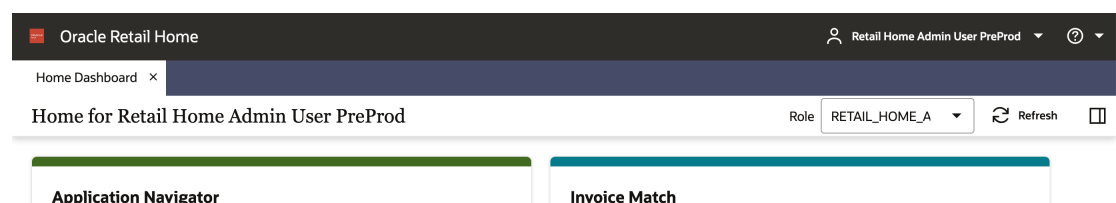
Retail Home Dashboard

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

Dashboard Controls

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

Figure 1-2 Dashboard Controls



Roles

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

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



Note:

Roles will only be listed if the user has been granted that role, and if a dashboard has been defined for that role.

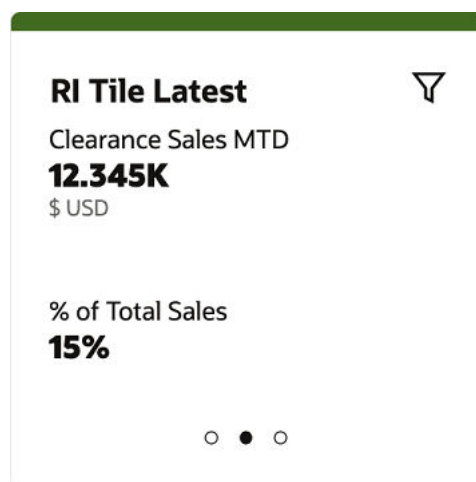
Refresh

The user can refresh their dashboards using the Refresh button.

Tiles

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

Figure 1-3 Dashboard Tile



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

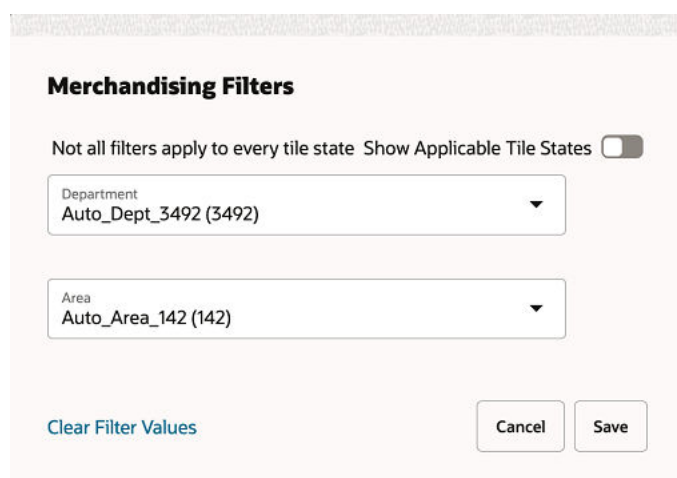
First, Oracle Retail enterprise application tiles that have been configured to support favorites and notifications will display a favorites and notifications icon in the tile header.

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

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

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

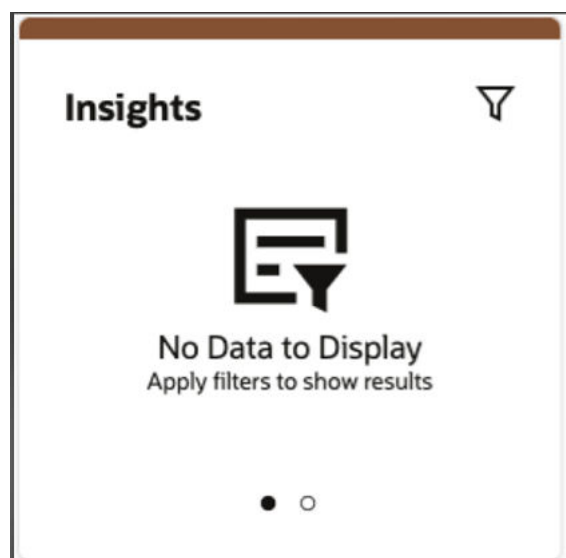
Figure 1-4 Filter Dialog for a Tile



The screenshot shows a dialog box titled "Merchandising Filters". At the top, it says "Not all filters apply to every tile state" followed by a toggle switch for "Show Applicable Tile States". Below this are two dropdown menus: "Department" with the value "Auto_Dept_3492 (3492)" and "Area" with the value "Auto_Area_142 (142)". At the bottom left is a link "Clear Filter Values", and at the bottom right are "Cancel" and "Save" buttons.

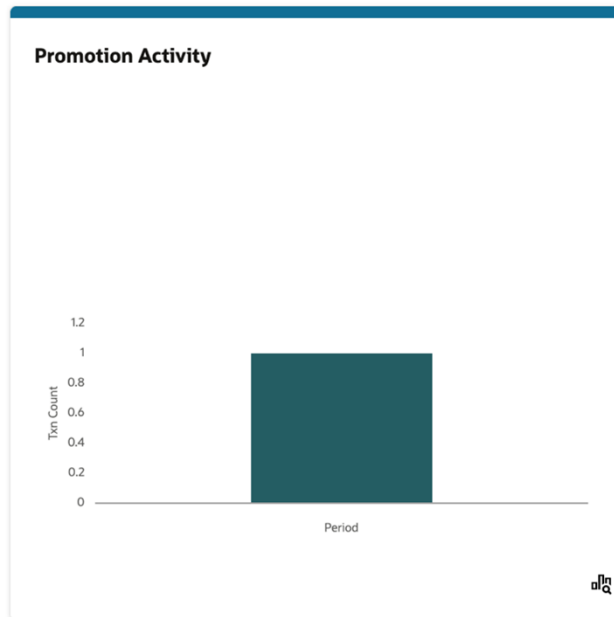
When dashboard tiles are initially loaded, if required filters do not have values entered, the following message is displayed for the corresponding tile page.

Figure 1-5 No Data to Display



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

Tiles also support expanded reports, which are indicated by an icon in the lower right corner of the tile. Clicking this icon will launch the corresponding report in a larger window on the dashboard.

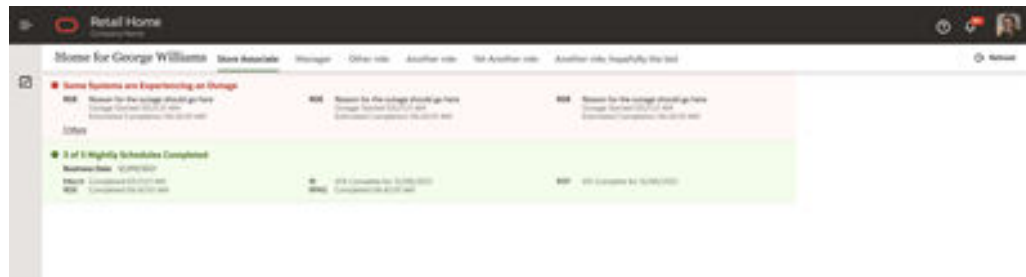


For Oracle Data Visualization reports, the button instead launches the Oracle Data Visualization app to the corresponding report in a new tab. The display mode of the report depends on the user's permissions. Users with write access will see the report in editor mode, while users who only have read access will see it in presentation mode. If a user doesn't have read permissions, they will receive an error.

Outage Banner

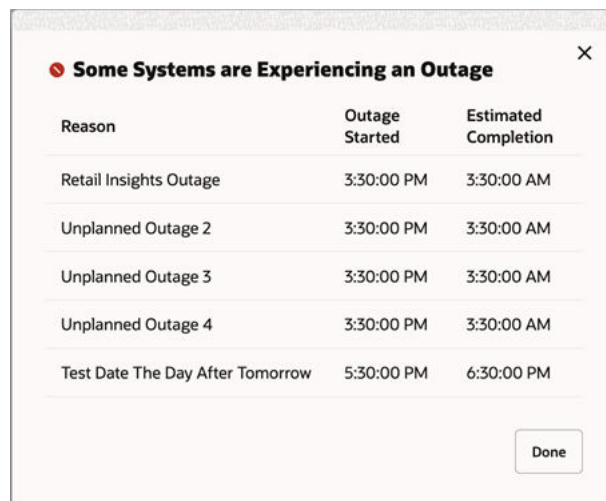
The dashboard displays a banner to let the Retail Home users know about any current outages. This banner is displayed in the same area as the batch status banner.

Figure 1-6 Outage Banner



- The banner displays a “Some Systems are Experiencing an Outage” message with the following details:
 - Name of the application impacted by the outage.
 - Reason for the outage.
 - “Outage Started” text with the outage start time.
 - “Estimated Completion” text with the scheduled completion time.
- The outage details for the application(s) are removed once the intended task is complete, even if it's before the Estimated Completion timestamp.
- The “Estimated Completion” time is updated if the outage is extended beyond the Estimated Completion timestamp.
- If there are than 3 outages listed on the banner, a **More** link is displayed for the overflow.
- When the **More** link is clicked, it presents all the current outages in an error modal dialog. Click **Done** to close the modal dialog.

Figure 1-7 Outage Banner – All Current Outages



Reason	Outage Started	Estimated Completion
Retail Insights Outage	3:30:00 PM	3:30:00 AM
Unplanned Outage 2	3:30:00 PM	3:30:00 AM
Unplanned Outage 3	3:30:00 PM	3:30:00 AM
Unplanned Outage 4	3:30:00 PM	3:30:00 AM
Test Date The Day After Tomorrow	5:30:00 PM	6:30:00 PM

Batch Status Banner

The dashboard displays a banner while batch jobs are currently running or active. If there are any POM jobs currently active or running, the Batch Schedule Banner will be displayed below the [Outage Banner](#) and moves back to the top once all the outages are complete.

Note:

Some Oracle Retail Products may not allow users to access the application while a batch process is running. Please consult the product-specific documentation.

Figure 1-8 Batch Status Banner



The banner displays the following for the current business date:

- The number of jobs scheduled and the number that are complete
- After a job is complete, a **Completed** status beside the job name, along with the completion time.
- If a job is currently running, the banner shows the percentage of completion.
- If a job hasn't started, the banner shows **0% Complete** for the job.

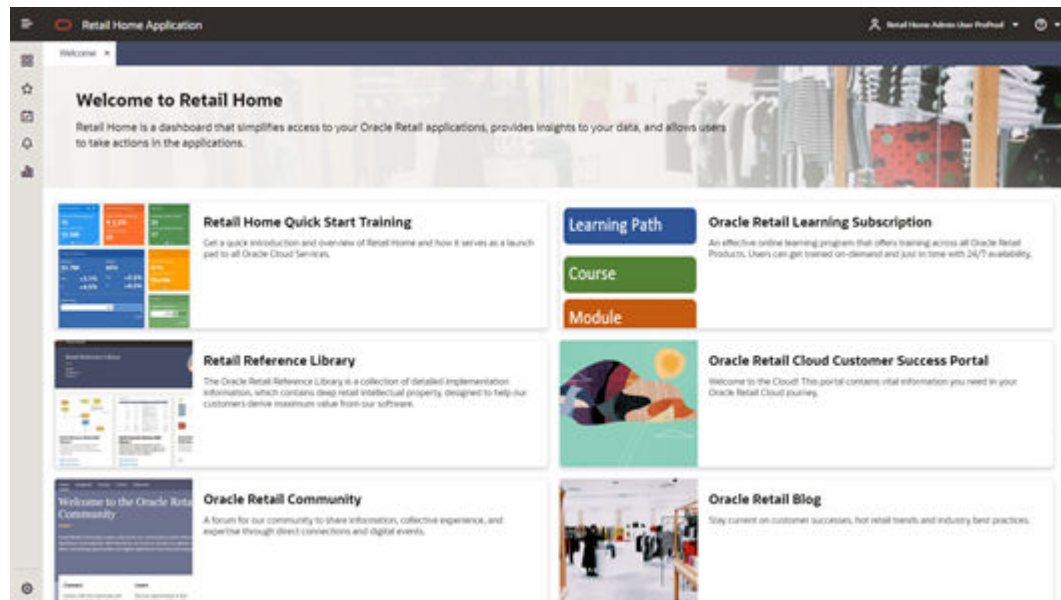
2

Welcome Screen

The Welcome Screen, shown when a user first logs in to Retail Home, contains links to the following useful items. Descriptions of each of these are on the Welcome Screen.

- Retail Home Quick Start Training
- Oracle Retail Learning Subscription
- Retail Reference Library
- Oracle Retail Cloud Customer Success Portal
- Oracle Retail Community
- Oracle Retail Blog
- Oracle Retail Rack

Figure 2-1 Welcome Screen Showing the Retail Reference Library

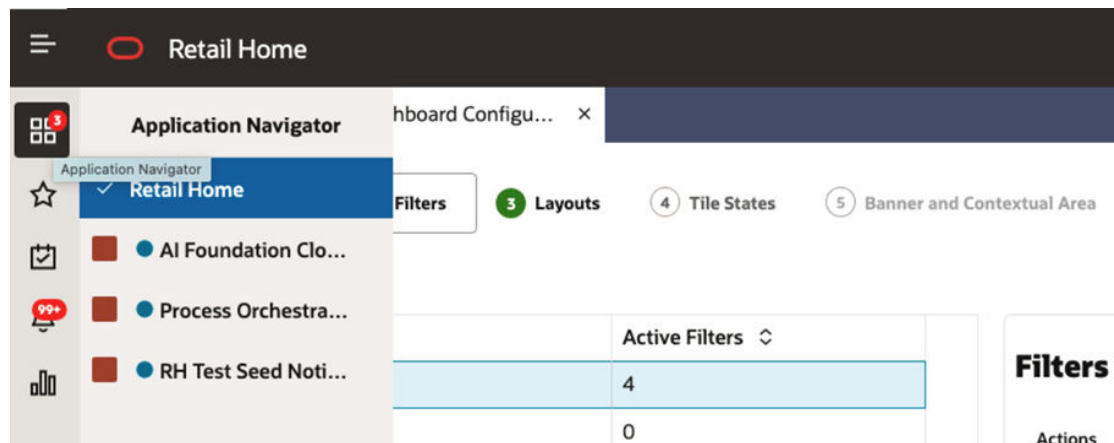


3

Application Navigator

The Application Navigator menu is populated with the list of applications configured by the Retail Home Administrator. When clicked on the application, the user goes to the launch URL configured for that application.

Figure 3-1 Application Navigator



Whenever a new application has been added since the last time the user logged in, the user will be able to see the following:

- A count of new applications near the Application Navigator icon in the left menu bar.
- A blue indicator beside the new application name inside the menu.

Once the user has viewed the addition of new application, the indicator is cleared. This is applicable only for newly added applications and not for updated or deleted ones.

4

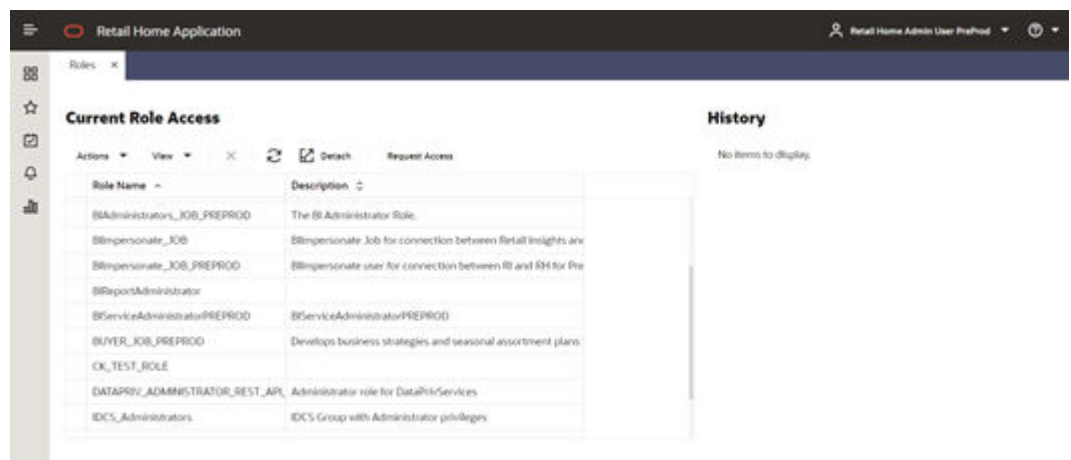
Requesting Role Access

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

Role Request

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

Figure 4-1 Role Request Screen



Current Role Access

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

Figure 4-2 Current Role Access

Current Role Access	
Actions ▾ View ▾ ✕ ↺ ↻ Detach	Request Access
Role Name ↕	Description ↕
BIAdministrators_JOB_PREPROD	The BI Administrator Role.
DATAPRIV_ADMINISTRATOR_REST_API_ROLE	Administrator role for DataPrivServices
RETAIL_ASYNC_TASK_JOB	RETAIL_ASYNC_TASK_JOB
RetailVisualAnalyzer_JOB	The Retail Visual Analyzer gives Visual Analyzer only Access.

Requesting Access

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

Figure 4-3 Requesting Access

Roles x

Request Access for Self x

Select Roles

Filter...

Sort By Name, A-Z

ACCOUNTS_PAYABLE_MANAGER_JOB

ACCOUNTS_PAYABLE_MANAGER_JOB_PREPROD

ACCOUNTS_PAYABLE_SPECIALIST_JOB

ACCOUNTS_PAYABLE_SPECIALIST_JOB_PREPROD

ADMINISTRATOR_JOB

ADMINISTRATOR_JOB_PREPROD

* Justification

Approver's Email navya.nn@oracle.com

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

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

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

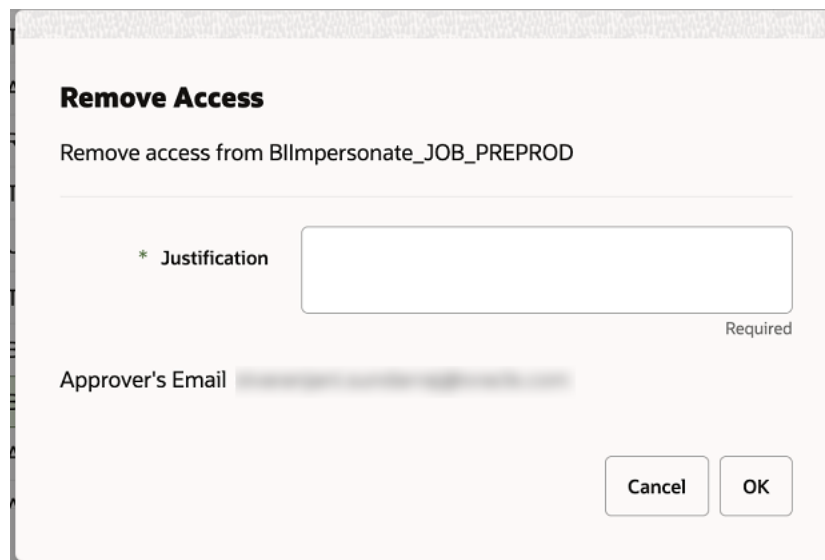
After selecting roles, the user must provide some business justification for the request in the Justification field. Below the Justification field, the user will also see the **Approver's Email** who will be responsible for handling their request.

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

Removing Access

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

Figure 4-4 Remove Access



Remove Access

Remove access from BImpersonate_JOB_PREPROD

* Justification

Required

Approver's Email

Cancel OK

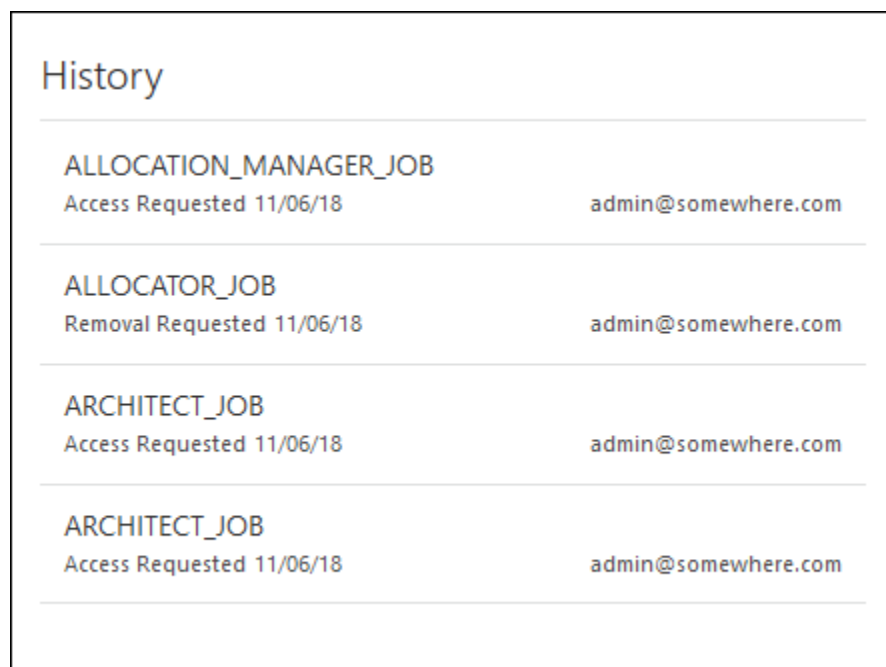
After doing this, the user will see the Remove Access prompt, shown above.

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

Request History

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

Figure 4-5 Request History



History		
ALLOCATION_MANAGER_JOB	Access Requested 11/06/18	admin@somewhere.com
ALLOCATOR_JOB	Removal Requested 11/06/18	admin@somewhere.com
ARCHITECT_JOB	Access Requested 11/06/18	admin@somewhere.com
ARCHITECT_JOB	Access Requested 11/06/18	admin@somewhere.com

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

Accessibility Features

Retail Home runs in browsers and is designed to integrate with existing browser accessibility options and tools. In most cases no additional effort is required for accessibility beyond what a user already does for their browser of choice. Some specific configurations that may be useful are detailed in this chapter.

Color Settings

The color display of dashboard tiles can be customized by administrators. All color schemes are designed to be high-contrast, and all functional UI elements use high-contrast color settings.

Graphs on tiles leverage the Oracle JET UI to display data in an accessible fashion and integrating applications can fully customize the display of the data.

Screen Readers

The Retail Home application is fully compatible with screen readers. All functional elements are properly labelled and all UI elements support keyboard interaction.

5

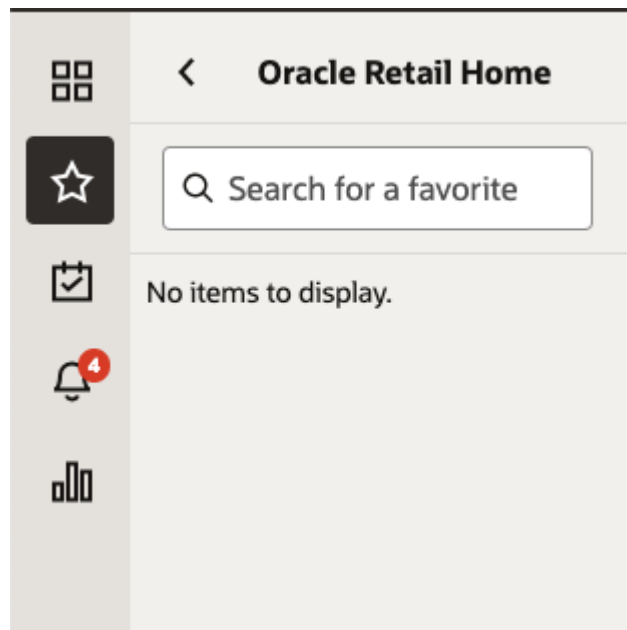
Favorites

The Favorites screen displays the items (tasks, reports, and so on) that have been marked as a "favorite" by the user within the target application. The user can click a favorite item to launch it on the target application within a separate browser window.

Access Favorites

The user can access the Favorites screen by clicking the Favorites icon on the task menu and navigating to the corresponding app.

Figure 5-1 Favorites



6

Notifications

Oracle Retail Applications provide a feature-rich notifications framework, which sends a variety of different types of notifications segregated by user roles.

Access Notifications

The user can access the notifications screen by clicking on the notifications icon on the task menu and navigating to the corresponding app.

The notifications icon has a red-colored badge that displays the total number of unread notifications for all the apps.

Each app has a notification badge associated with it, displaying the total number of unread notifications for the app.

Figure 6-1 Notification Icon

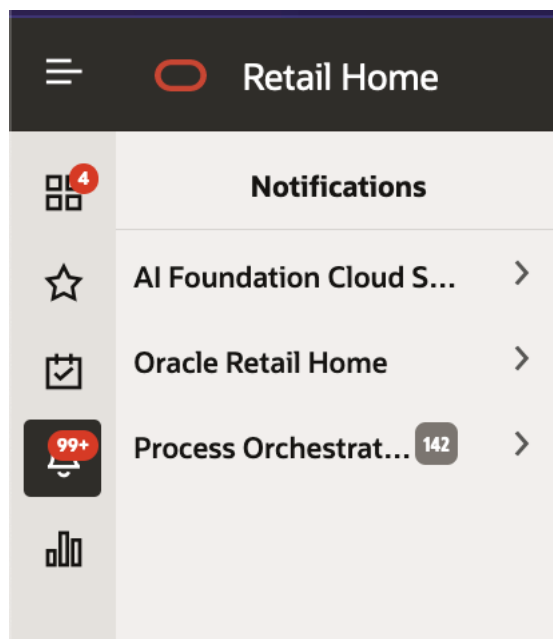
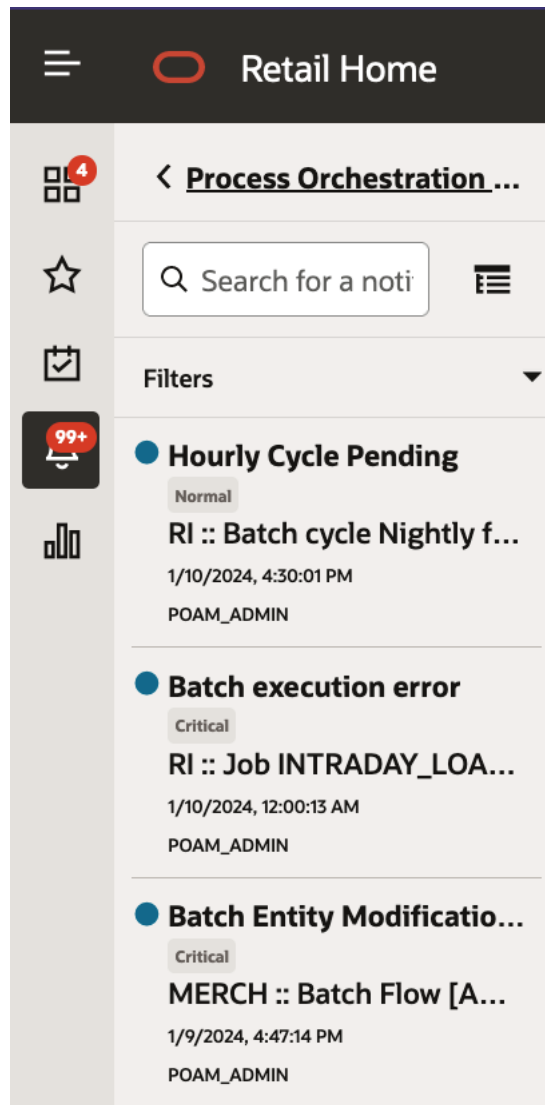
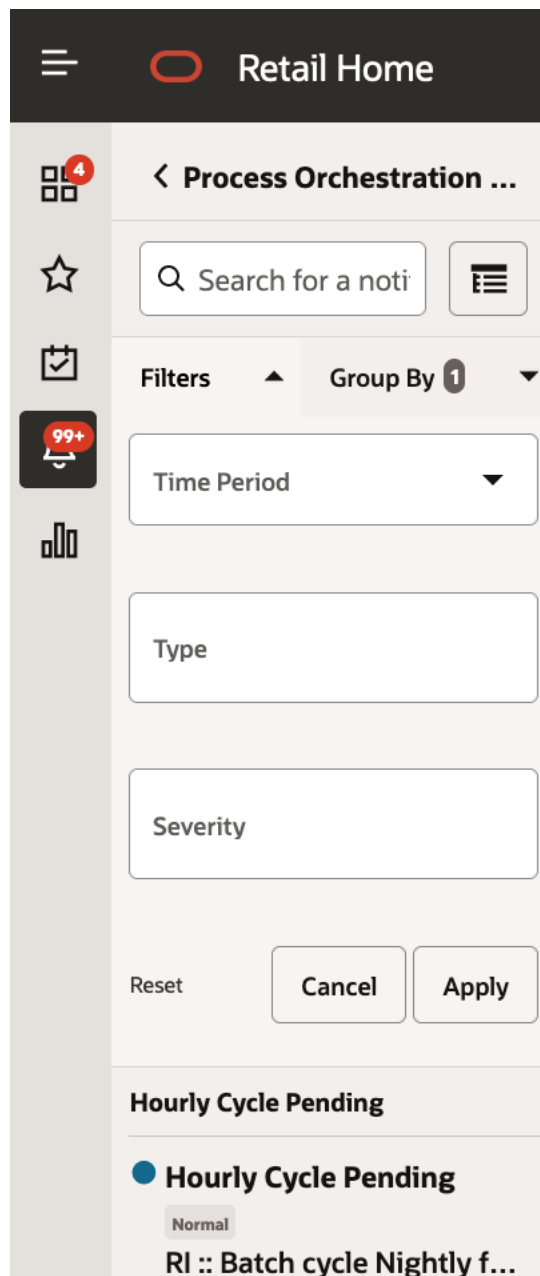


Figure 6-2 Notification Screen



The user can search for a notification or apply filter properties (Time Period, Type & Severity) to narrow down the search results.

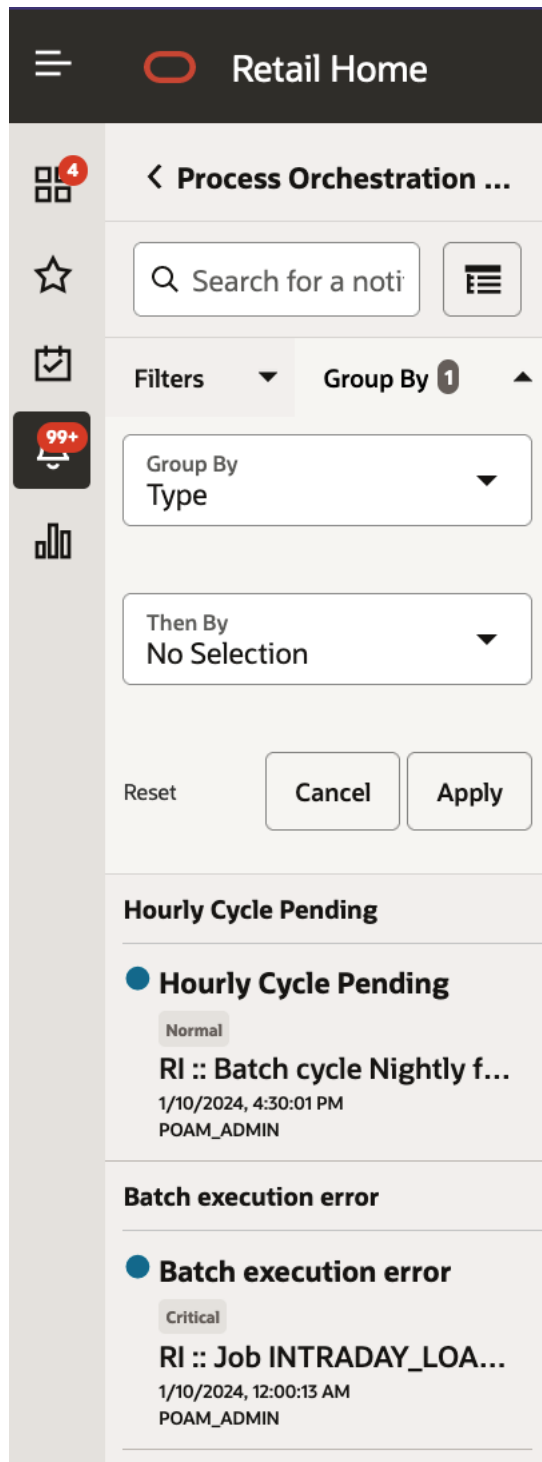
Figure 6-3 Search & Filter



The screenshot shows the 'Retail Home' mobile application interface. At the top, there is a dark header with a menu icon, a red 'O' logo, and the text 'Retail Home'. Below the header, the main content area is titled '< Process Orchestration ...'. On the left side, there is a vertical sidebar with several icons: a grid icon with a red '4' badge, a star icon, a calendar icon, a notification bell icon with a red '99+' badge, and a bar chart icon. The main content area contains a search bar with the placeholder text 'Search for a noti' and a filter icon. Below the search bar, there are two tabs: 'Filters' and 'Group By 1'. The 'Group By 1' tab is currently selected. Under the 'Group By 1' tab, there are three input fields: 'Time Period', 'Type', and 'Severity'. At the bottom of the filter section, there are three buttons: 'Reset', 'Cancel', and 'Apply'. Below the filter section, there is a section titled 'Hourly Cycle Pending' with a blue dot icon. Under this section, there is a 'Normal' button and a text label 'RI :: Batch cycle Nightly f...'. The 'Group By' dropdown menu is currently open, showing 'Hourly Cycle Pending' as the selected option.

The user can group notifications by clicking the **Group View** icon next to the search bar and then navigating to the **Group By** tab.

Figure 6-4 Group By Tab



The user can click the **See All** link (see the “Notification Screen” figure above) to launch the corresponding Apps Notifications page.

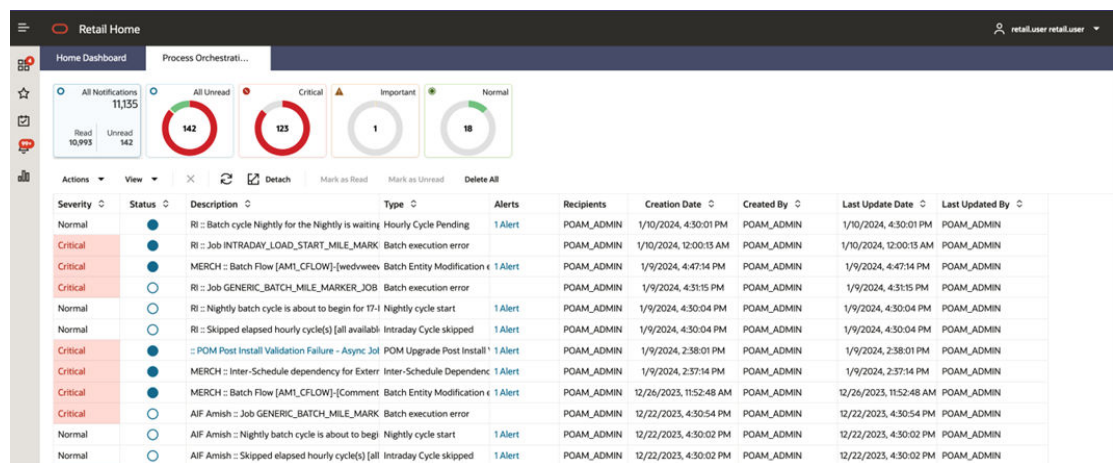
The Notification page displays additional information and allows the following actions to be performed.

- Delete
- Refresh
- Mark as Read
- Mark as Unread

The user can apply filters by clicking on one of the following tiles.

- All Notification
- All Unread
- Critical
- Important
- Normal

Figure 6-5 Notifications Page

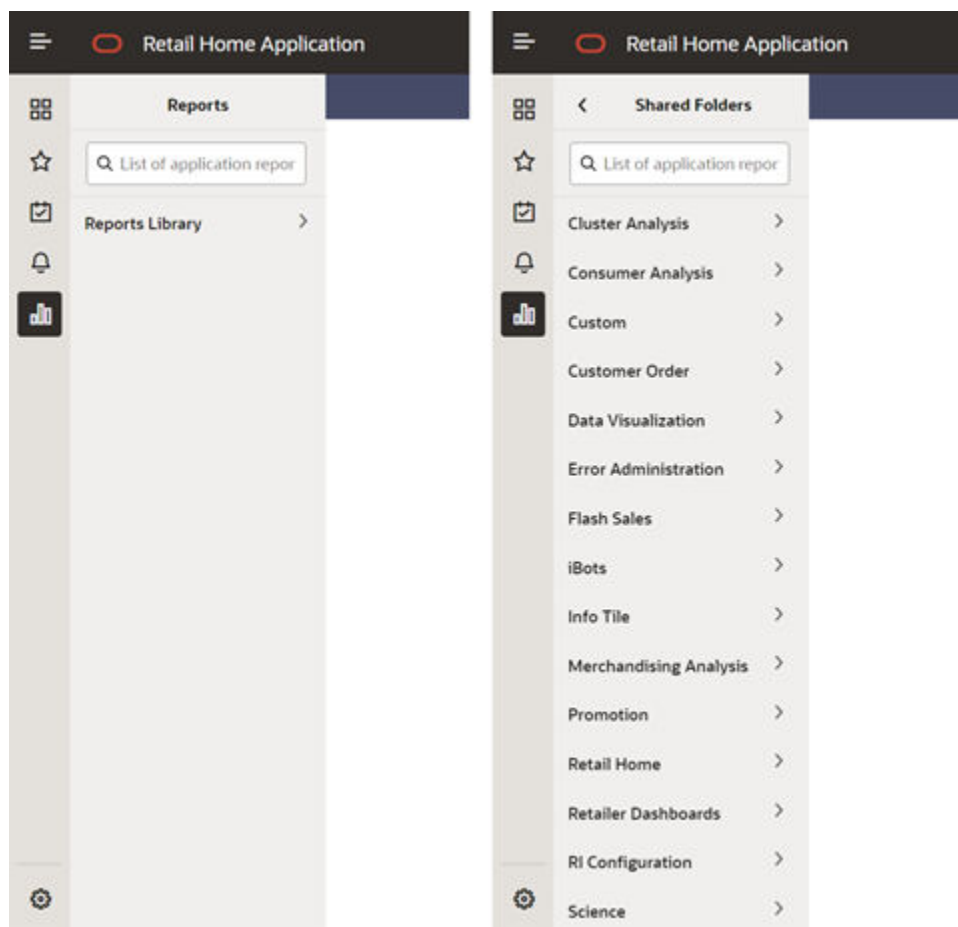


7

Report Catalog

The Reports menu item is available in the Retail Home sidebar that allows access to OBIEE reports. Click an item from this menu to open the report in a new tab. The user can access the Report Catalog in Retail Home through the **Reports** menu. To access the reports, click **Reports Library** in the **Reports** menu.

Figure 7-1 Reports Catalog



8

Help Center

Retail Home has been enhanced with a Help Center that provides real-time, interactive, and step-by-step, guided learning. The user can access the Resource Center by clicking the Help Center icon displayed on the configured pages.

Figure 8-1 Help Center Icon



Figure 8-2 Resource Center

