Oracle® Retail Home
Administration Guide

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Oracle Retail Home Administration Guide,

G45511-01

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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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When contacting Customer Support, please provide the following:

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

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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:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

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Convention	Meaning
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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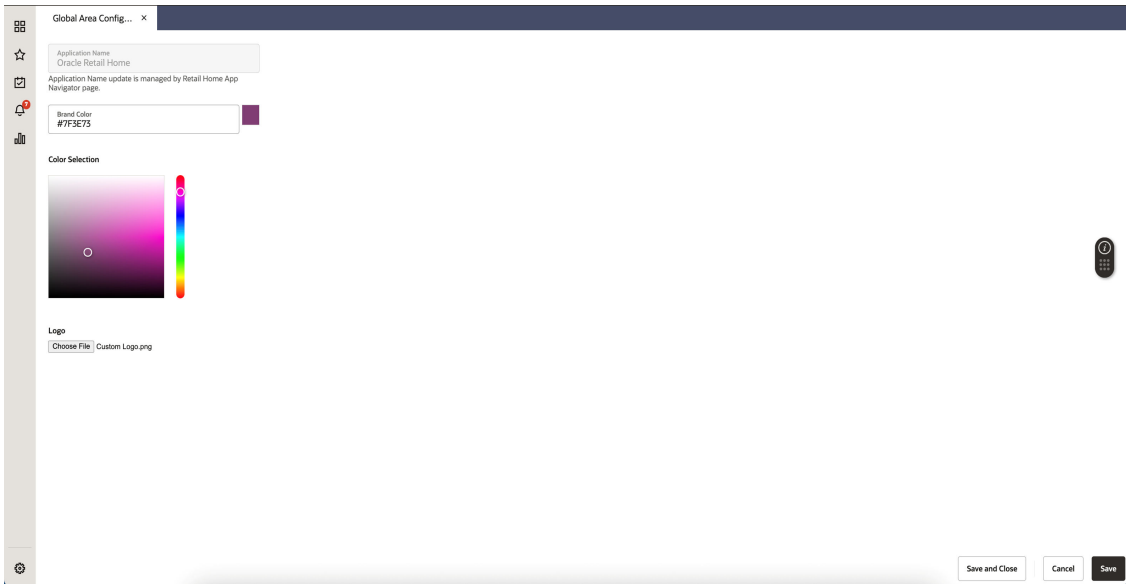
1
Global Area Configuration

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.

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

Figure 1-1 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.

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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 in Retail Home and other Retail Applications and to define dashboard tiles within Retail Home dashboards.

Figure 2-1 Application Navigator Setup Page

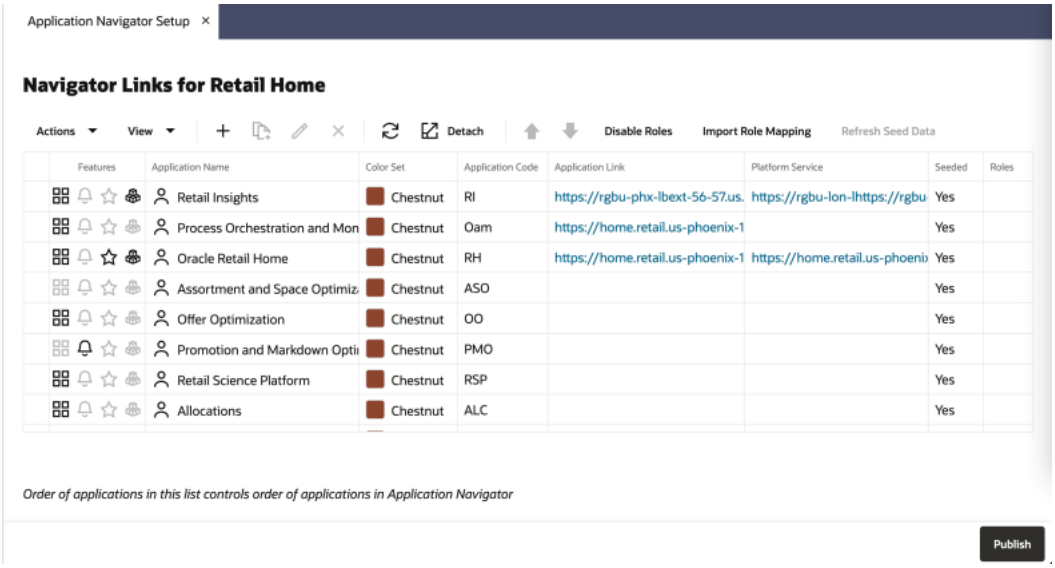

Figure 2-2 Application Navigator

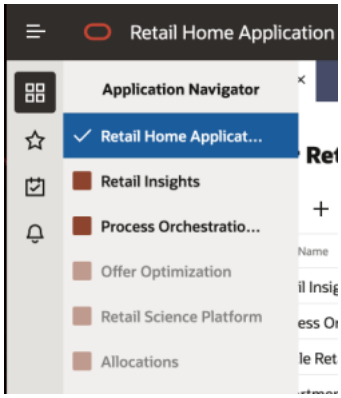

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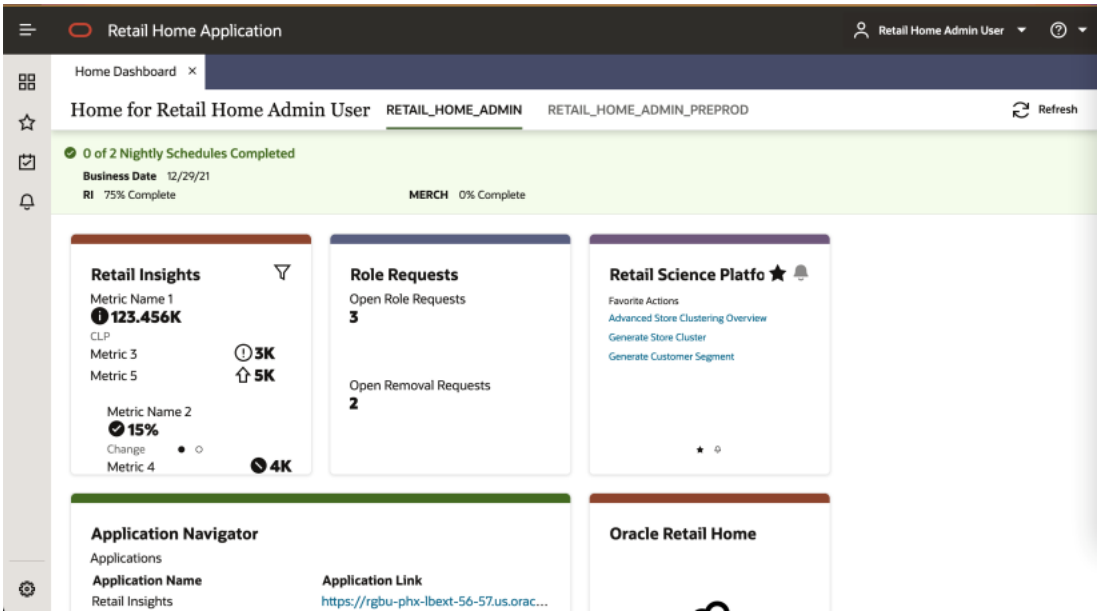
Figure 2-3 Retail Home Dashboard



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.

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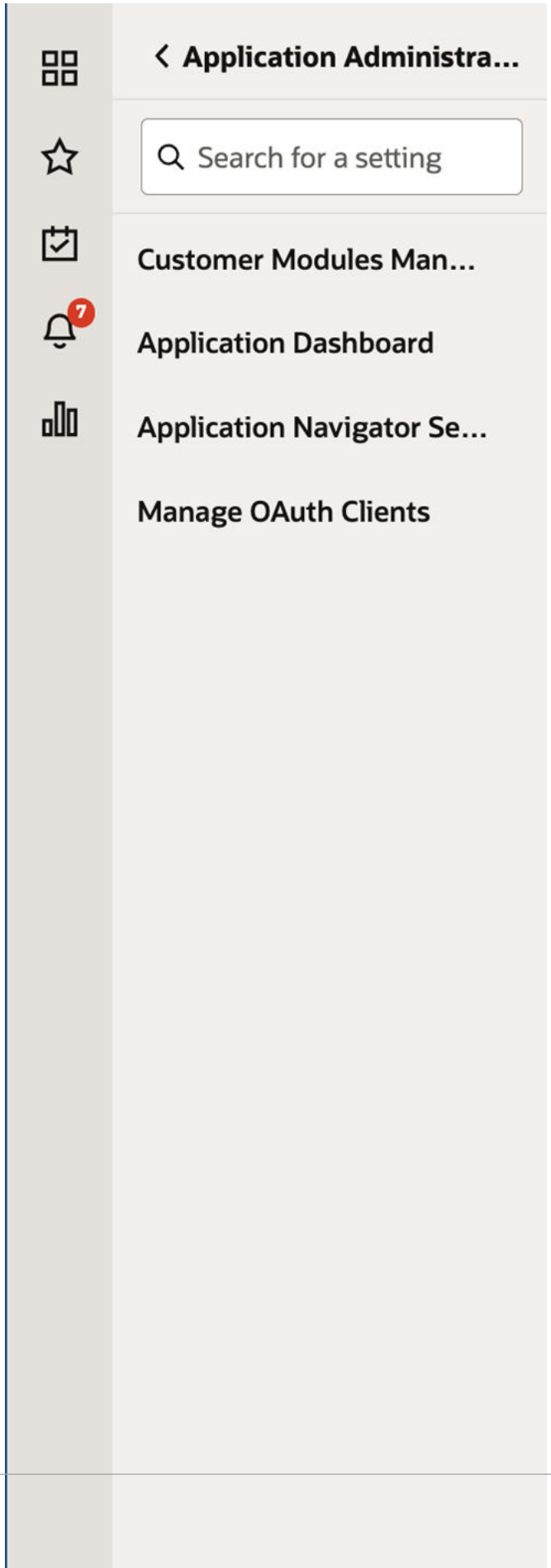
Figure 2-4 Application Navigator Setup Link in Settings -> Application Administration



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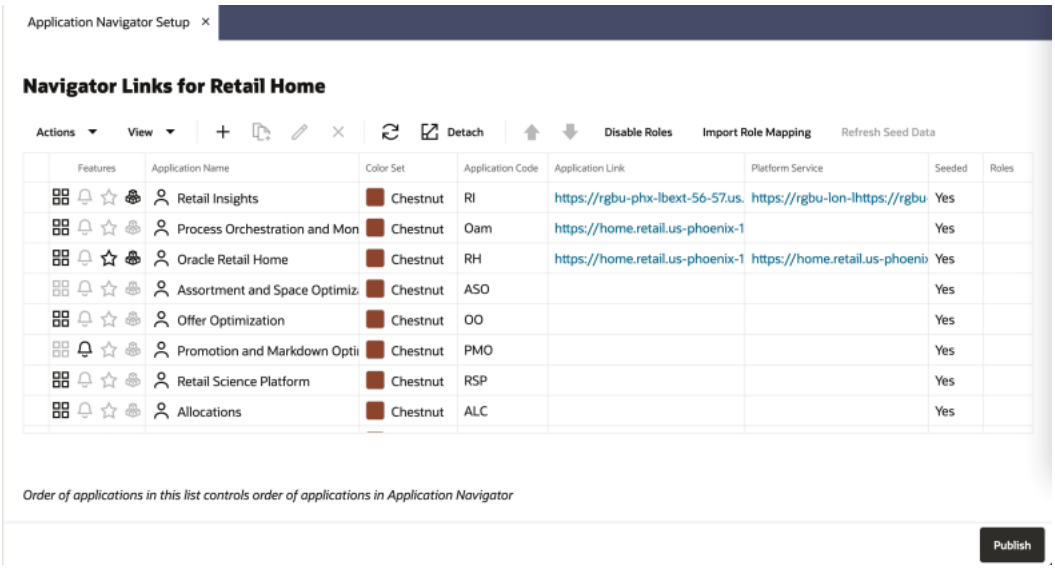
The Application Navigator Setup page shows a table of all the application navigator entries currently configured in Retail Home.

Figure 2-5 Application Navigator Setup Page



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.

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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.

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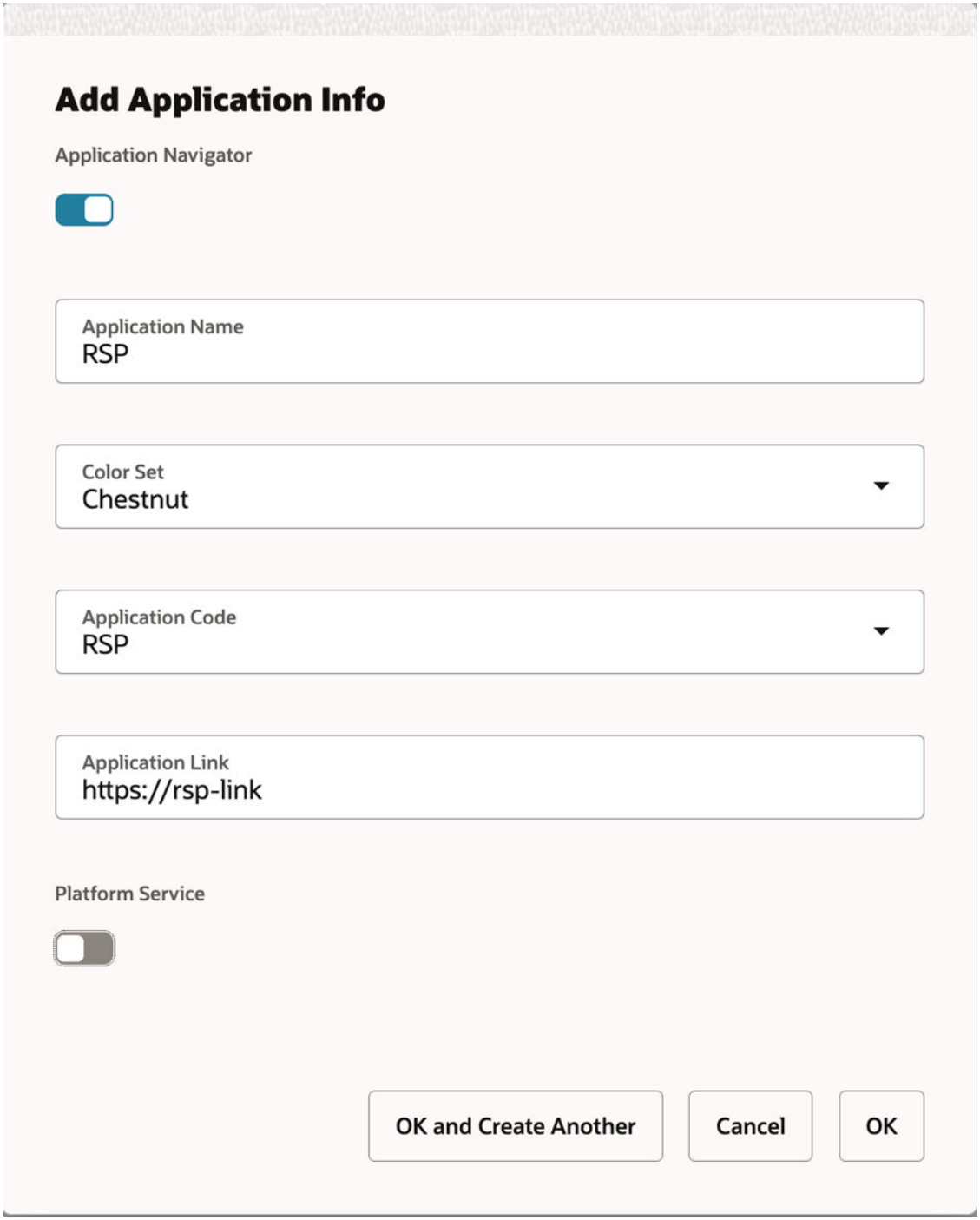
Figure 2-6 Add Application Info Dialog



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.

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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 (including seeded applications) in Retail Home.

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

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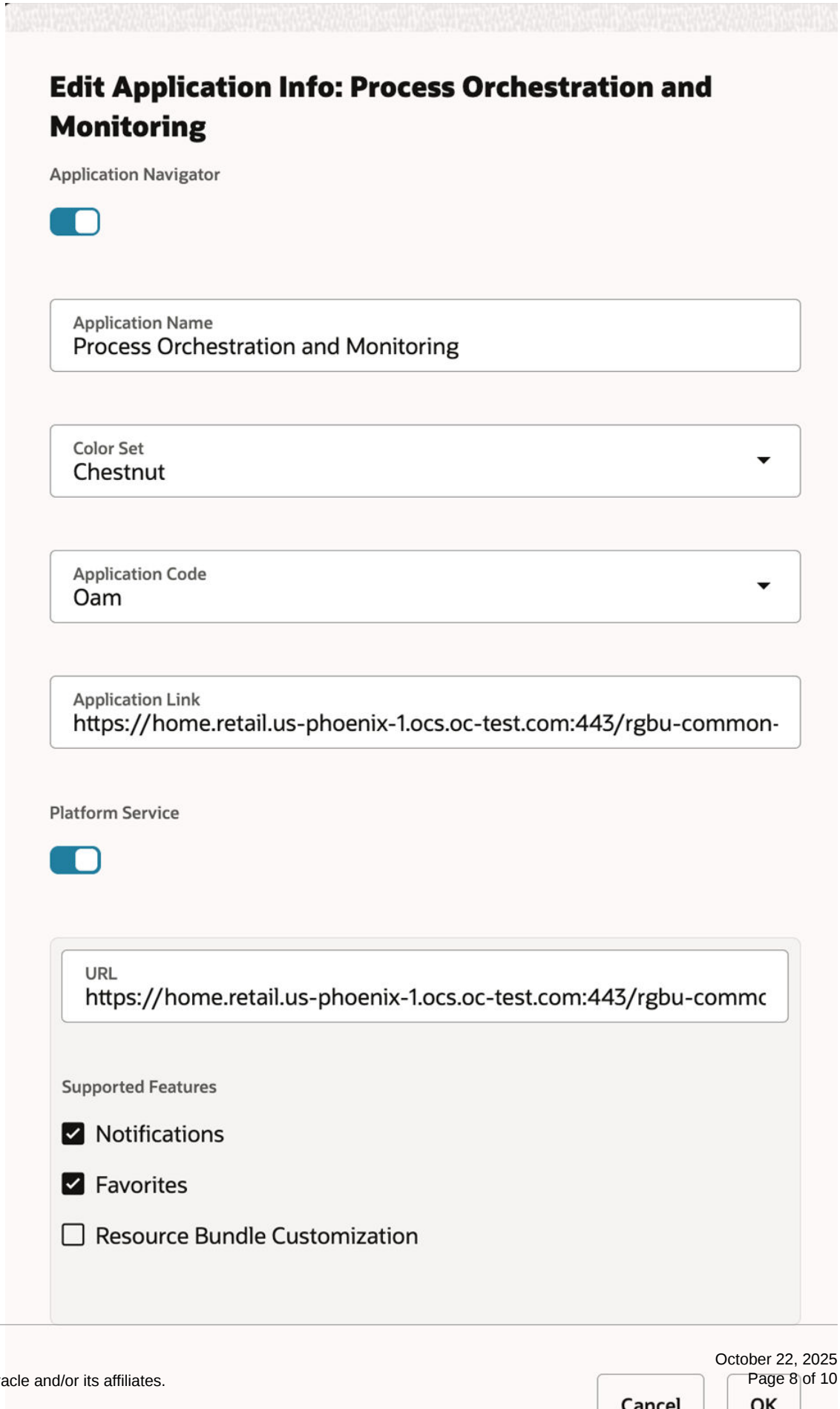
Figure 2-7 Edit Application Info Dialog



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Deleting an Application Navigator Entry

The "Delete" icon ✕ on the table toolbar allows users to delete the selected application navigator entry (including seeded applications) from Retail Home.

> **Note**
>
> Users cannot delete seeded entries from the Manage Application Navigator page.
>
> Users cannot delete the **Oracle Retail Home** application 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.

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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.

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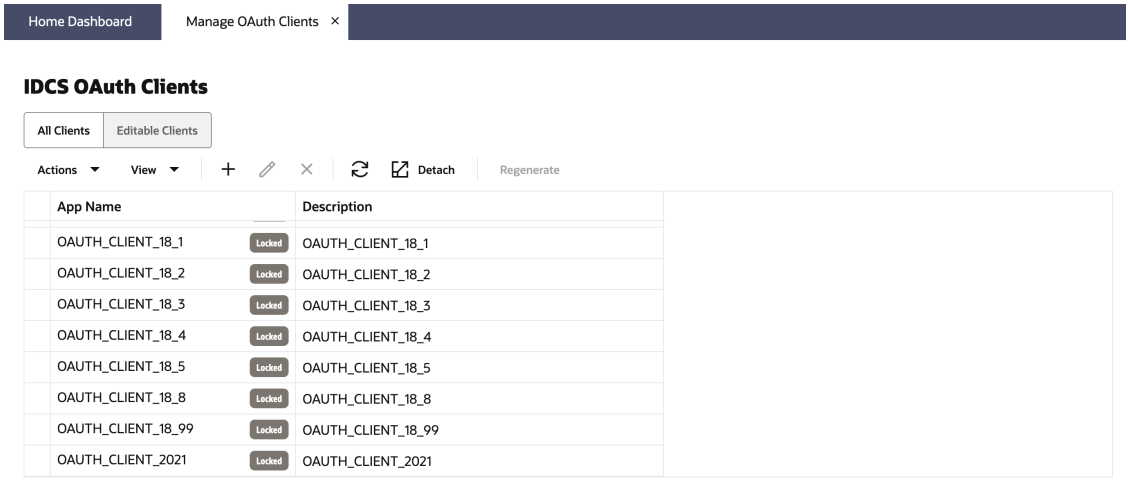
3

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.



Creating OAuth Client Applications

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

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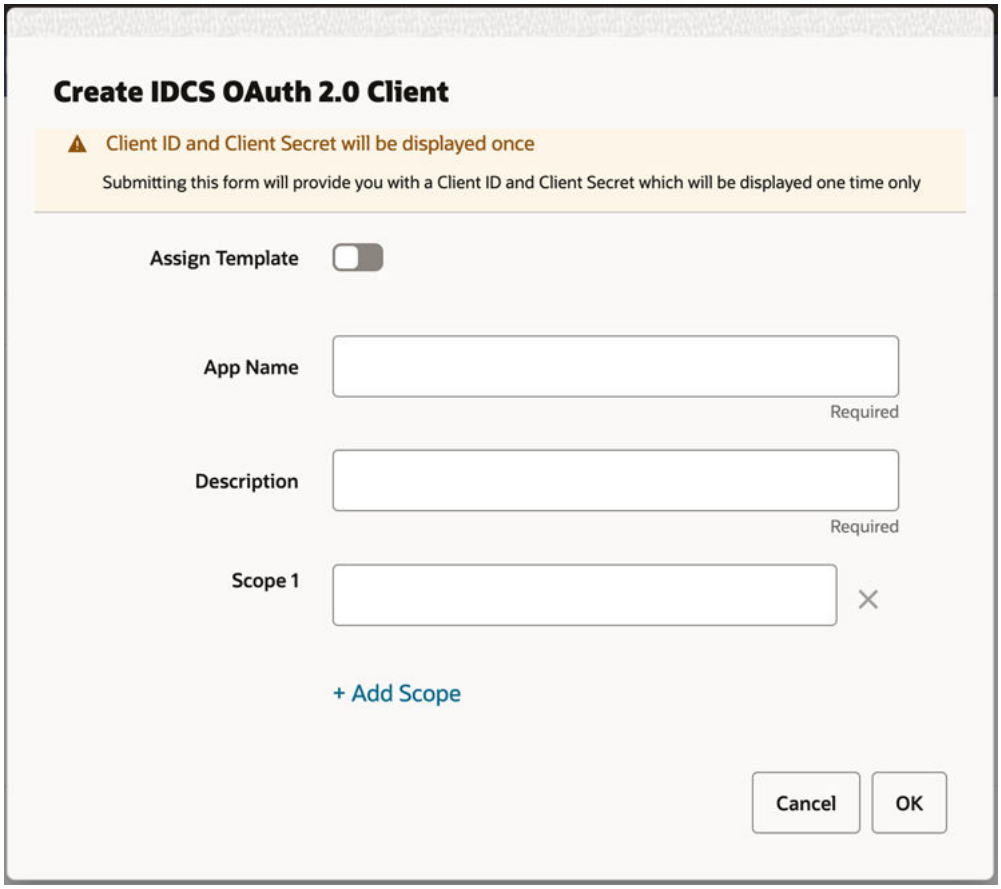

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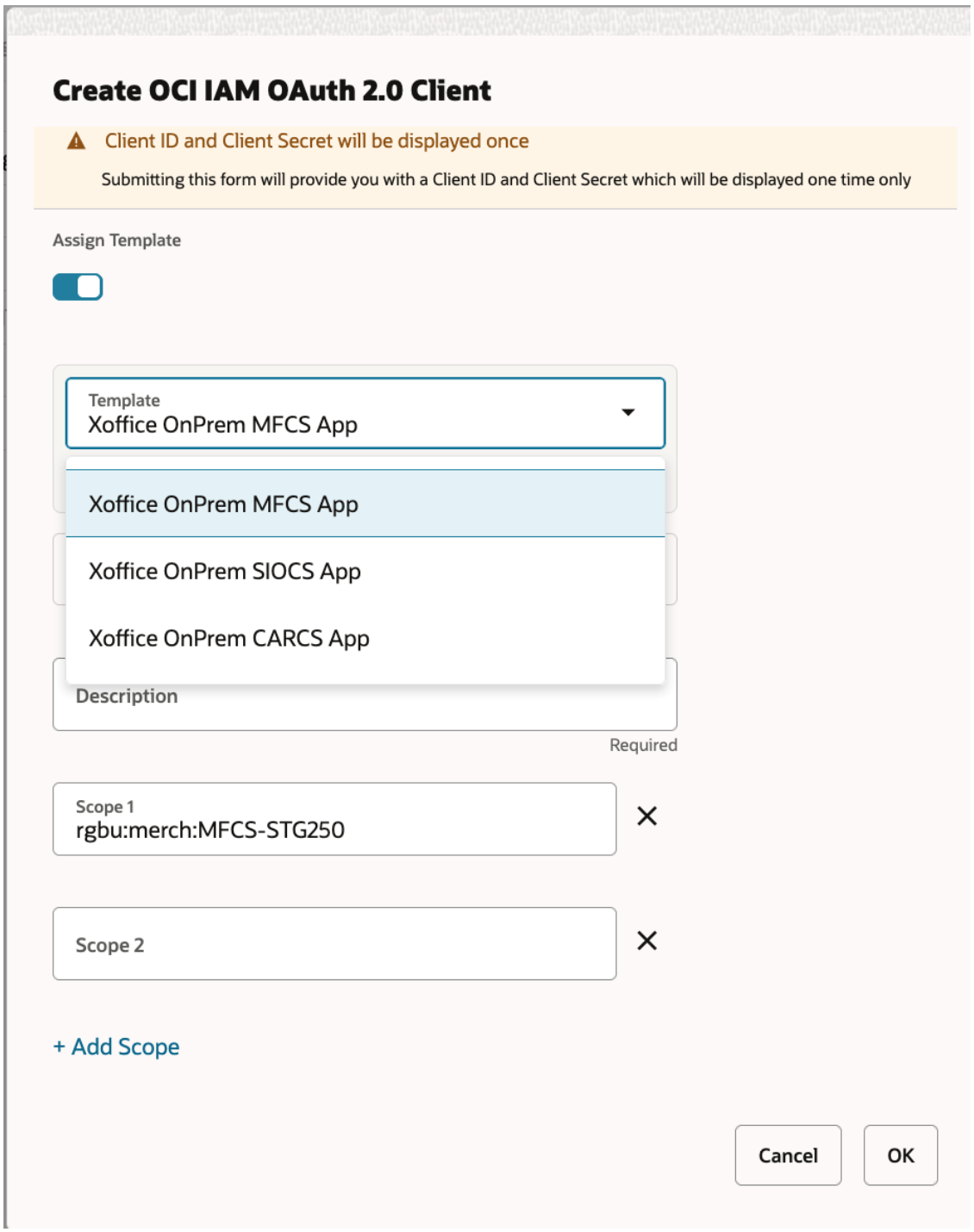

This dialog takes the following values:

- The **Assign Template** switch displays a **Template** dropdown containing a list of pre-defined templates. Selecting a template automatically populates the **App Name** and **Scope(s)** fields based on the selected template.
- 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.

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- **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`, `rgbu:carcs:delivery-rw-PRD1`, and so on.

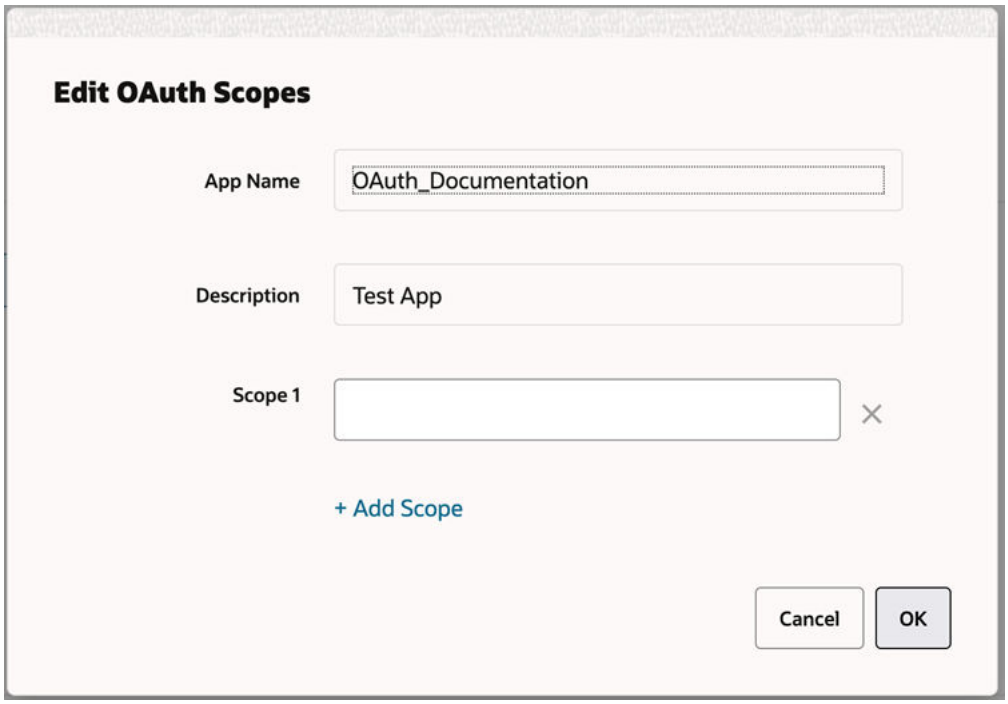
When the application is created, another dialog will open to show the client ID and client secret of the new application. These values should be copied down to a safe location, as they will only be shown once. *Retail Home cannot retrieve the credentials again after the dialog is closed.*

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.



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.

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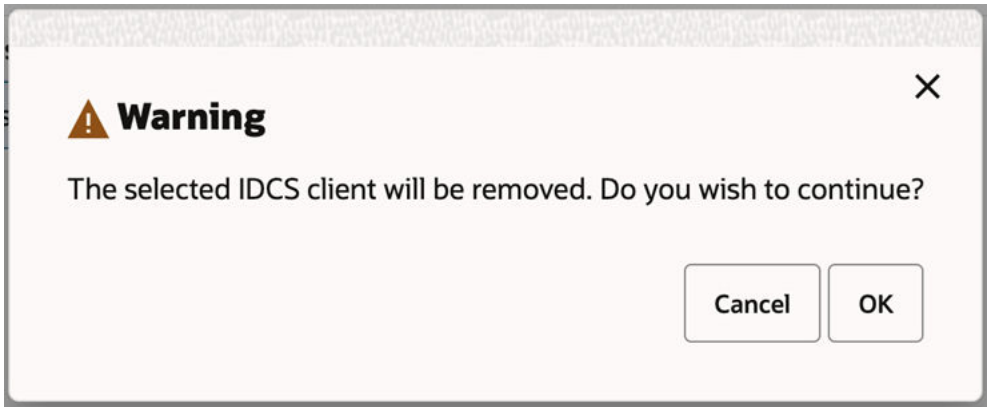

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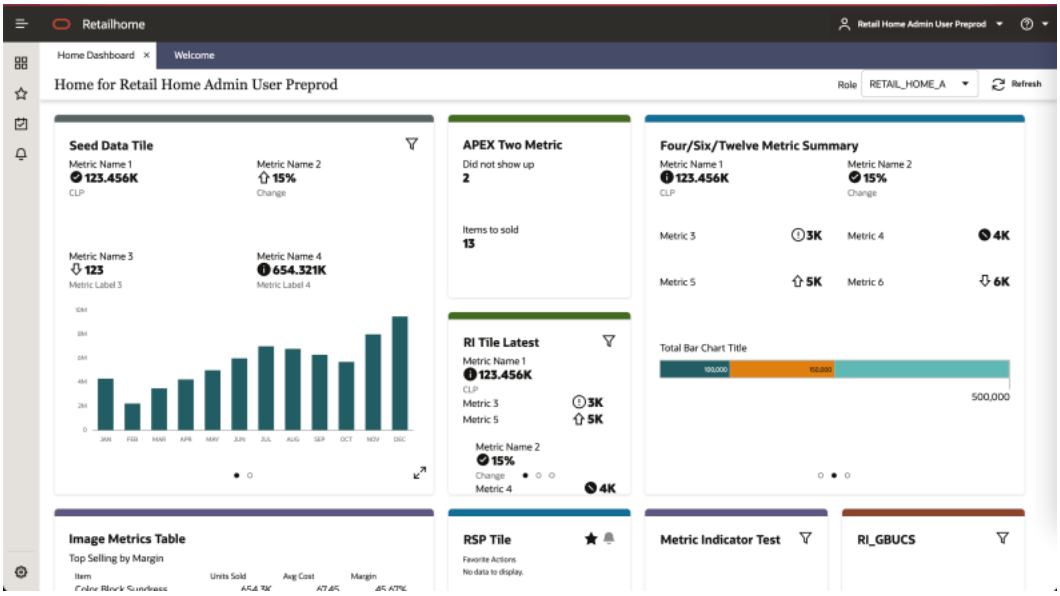
4
Dashboard Configuration

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. 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.

Tiles

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

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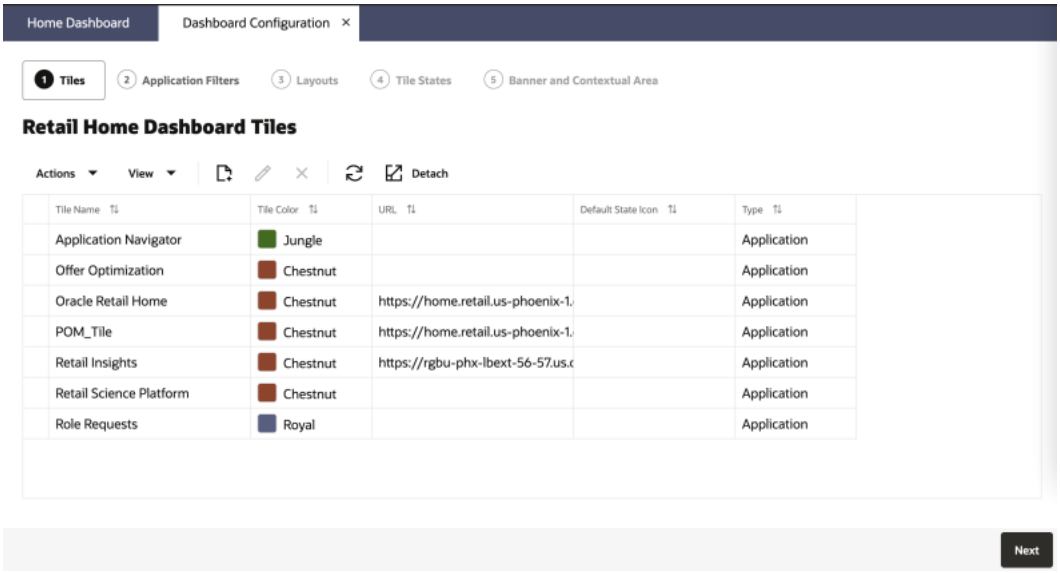
section describes how to create dashboard tiles, the first step in the Dashboard Configuration flow.

Adding a Tile

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

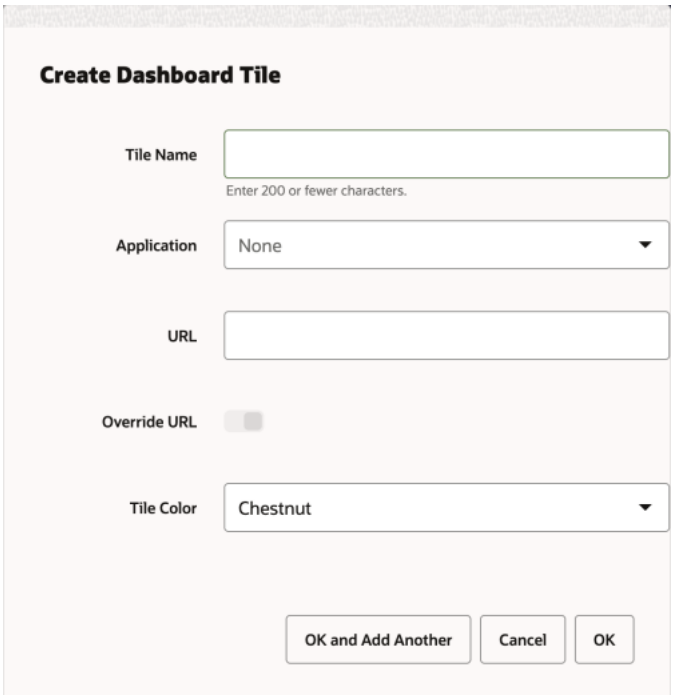
1. In the Dashboard Configuration flow, select the **Tiles** tab if it is not already selected.

Figure 4-1 Creating Dashboard Tiles



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

Figure 4-2 Create Tile



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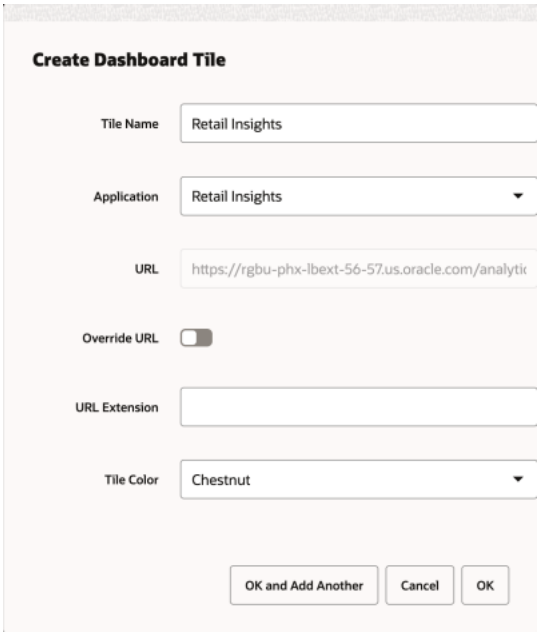
3. Enter text in the Tile Name text box.
4. Select the appropriate **Application** from the drop down. The **URL**, **URL Extension**, and **Tile Color** fields will be populated with corresponding values. The **URL** field gets the application URL automatically, but the user has the ability to override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

Figure 4-3 URL Extension & Override URL Switch



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.

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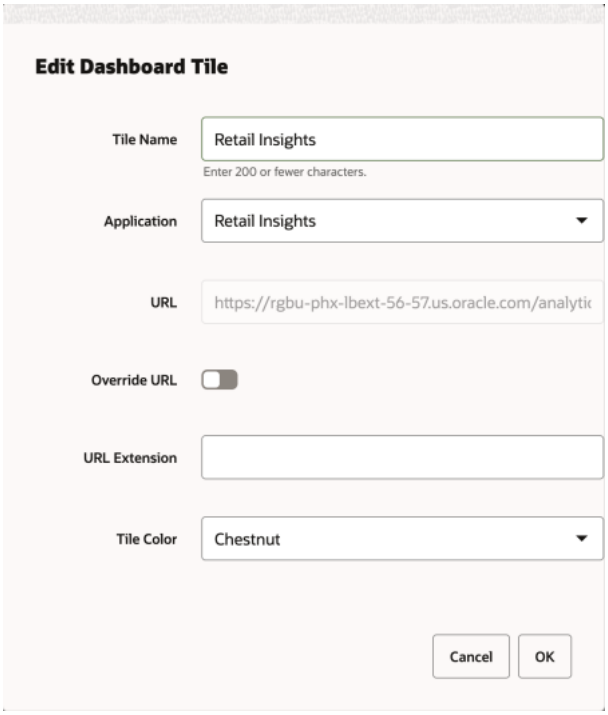
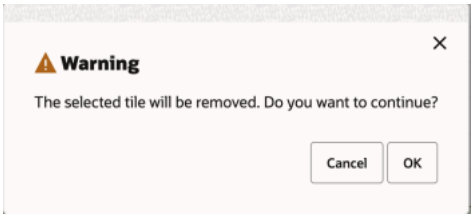
Figure 4-4 Edit Tile



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



Application Filters

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.

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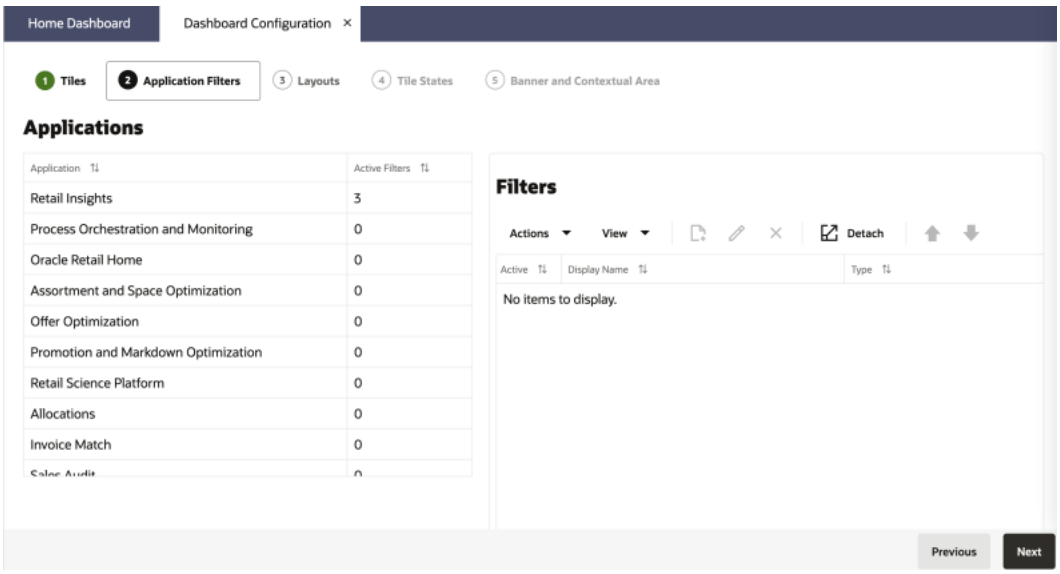
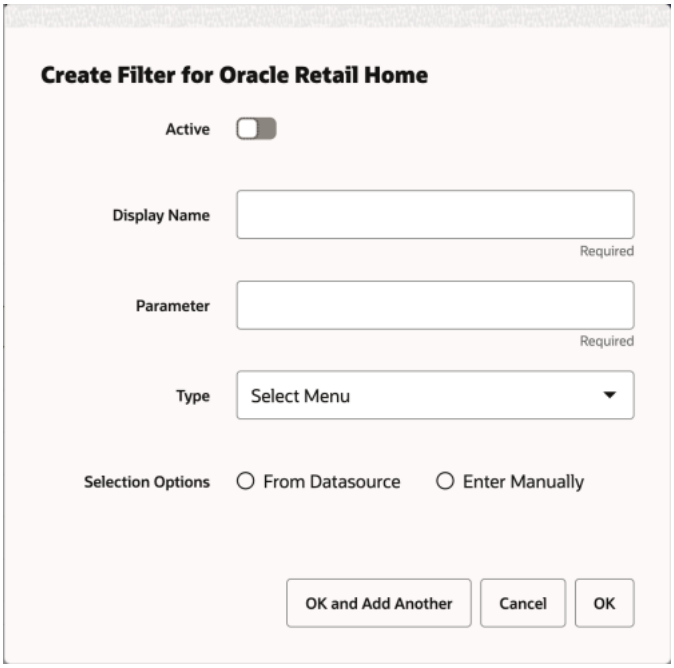


2. Select the application to add a filter for from the list of applications on the left.
3. Select the add button on the list of filters to the right.



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.

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Editing or Removing a Filter

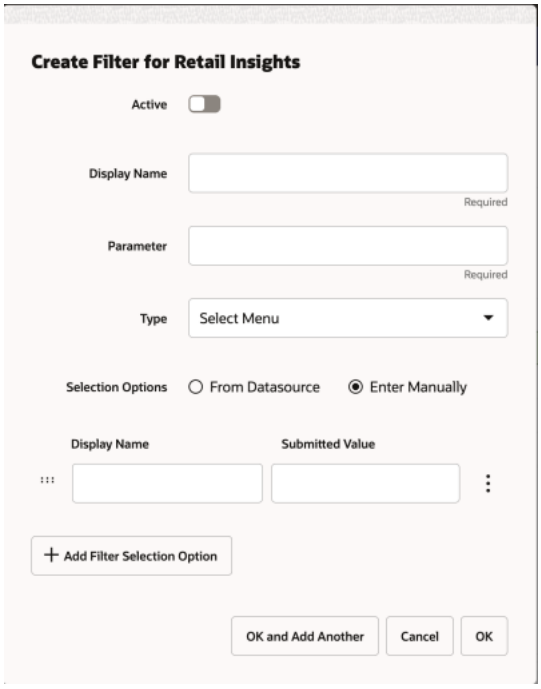
An existing filter can be edited by selecting it and selecting the edit button ✎ to open the dialog again. Filters can be removed by selecting the remove button ✕ and confirming.

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 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.

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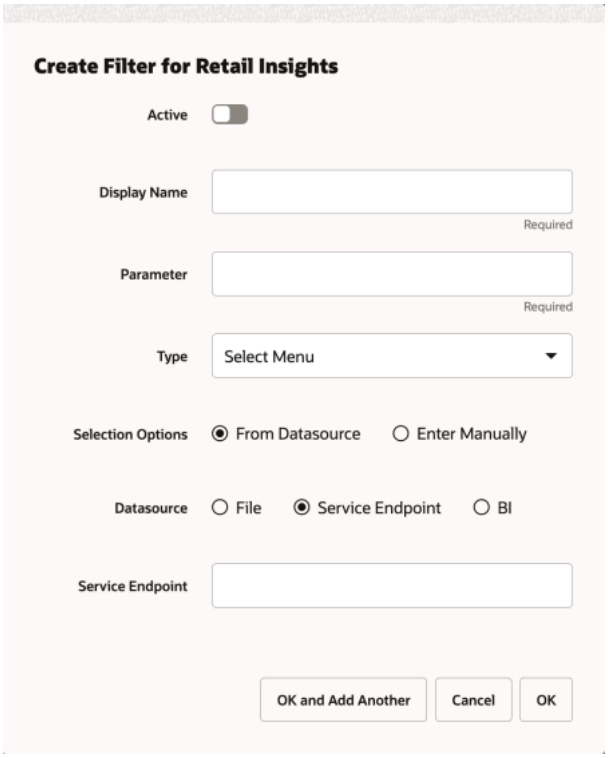

Service endpoints must accept GET requests according to the following API:

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.

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Layouts

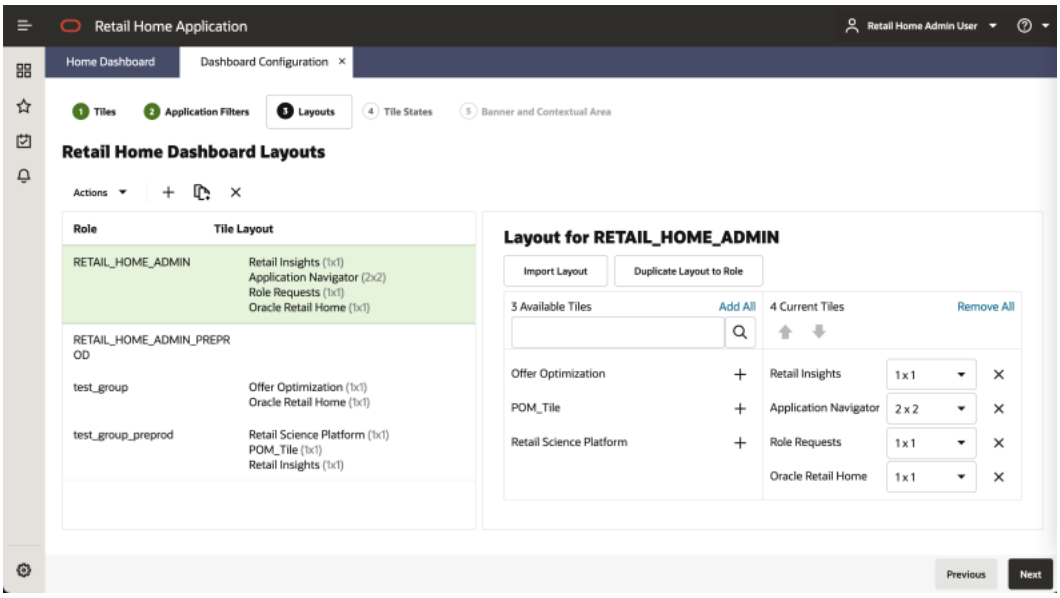
In Retail Home, an administrative user defines dashboards for enterprise roles. Users will see the dashboards configured for their enterprise role(s) when they log in to Retail Home. This section describes how to associate enterprise roles with application tiles.

Adding a Role

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

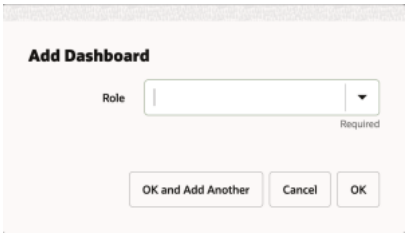
1. In the Dashboard Configuration flow, select the **Layouts** tab if it is not already selected.

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.

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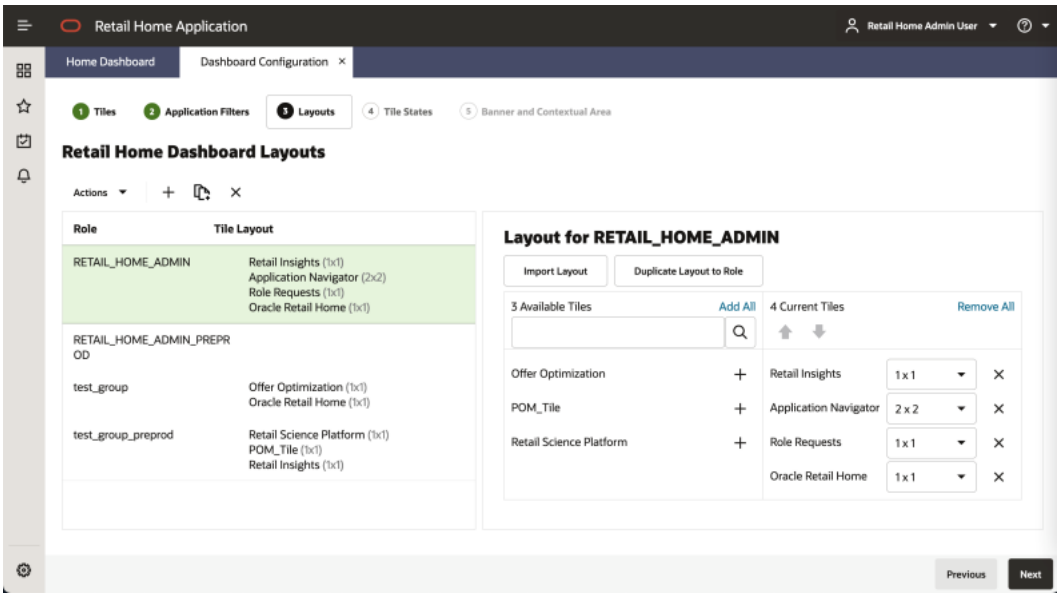
Duplicating a Role Configuration

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

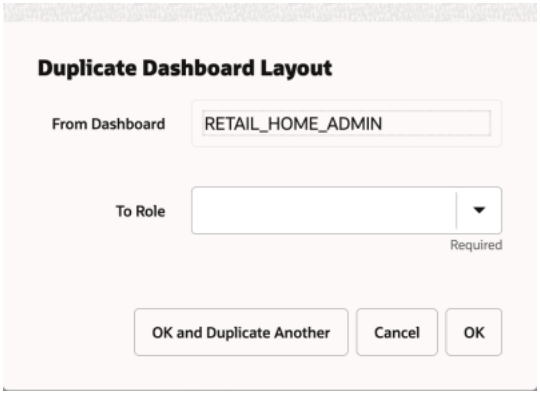
1. In the Dashboard Configuration flow, select the **Layouts** tab if it is not already selected.

Figure 4-8 Mapping Table for Role and Application Tiles



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



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.

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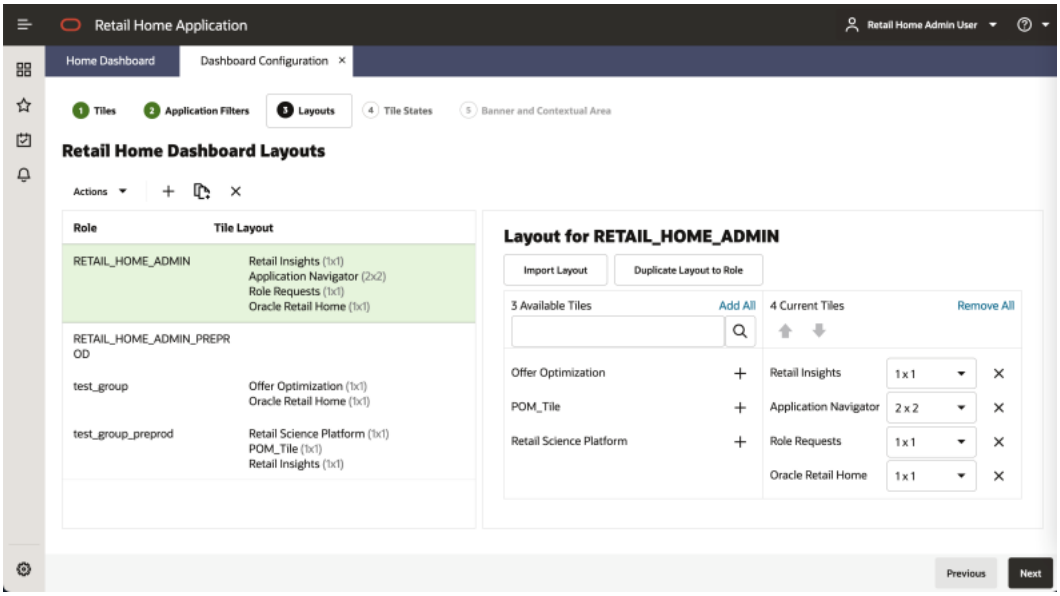
Adding/Editing Tile Layout to a Role

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



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.

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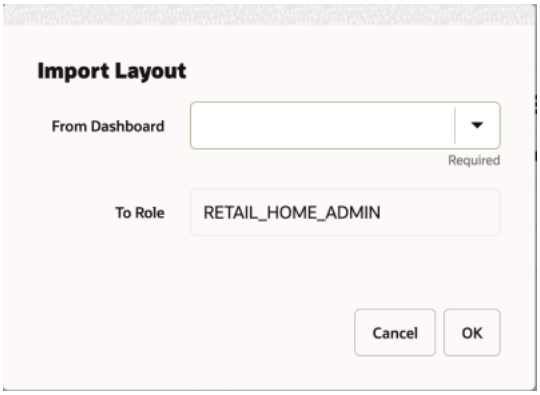
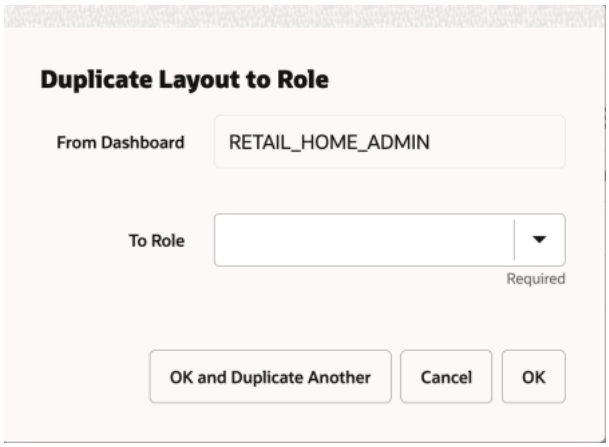
Figure 4-11 Import Layout Dialog Box



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

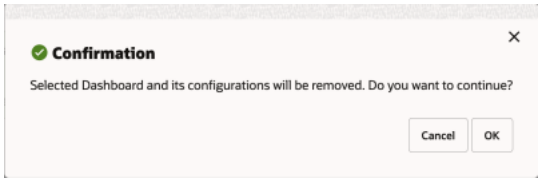


Deleting a Role

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



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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.

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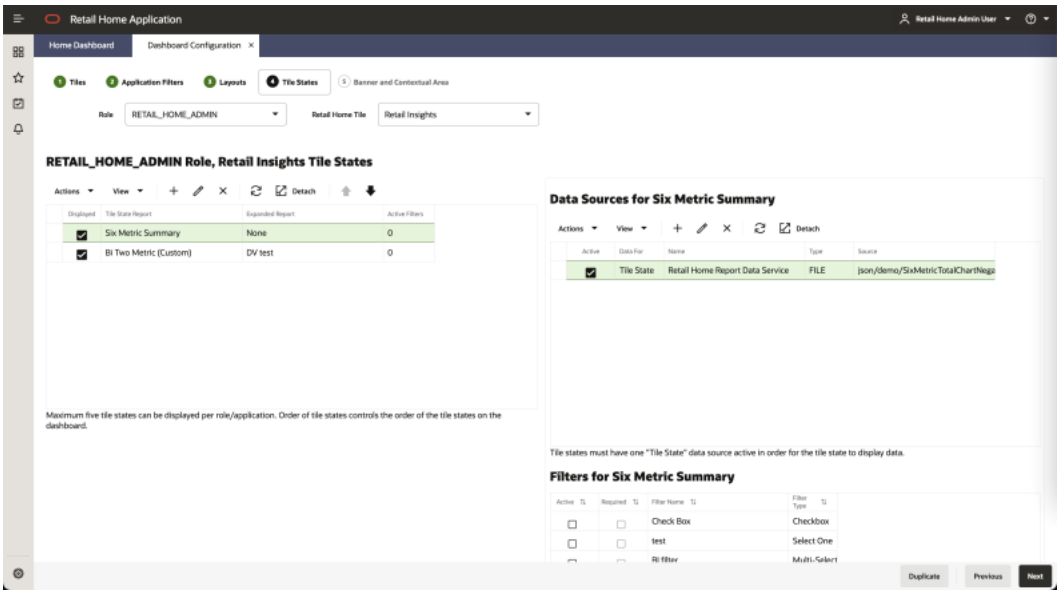
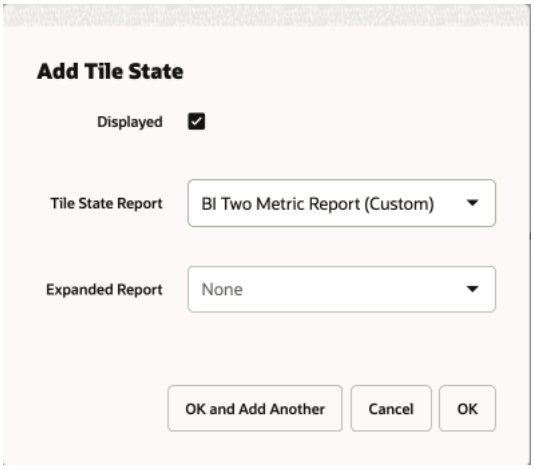
Figure 4-14 Tile Configuration for RETAIL_HOME_ADMIN Role and Retail Insights Application



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.

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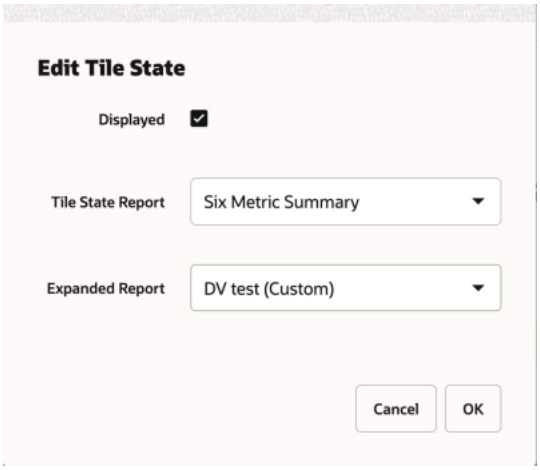
7. Click **OK** to save your changes and close the dialog box. Click **OK and Add Another** to save your changes and add another tile state. Click **Cancel** to close the dialog box without saving your changes.

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.

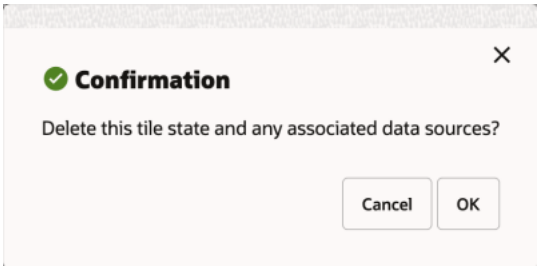
Figure 4-16 Edit Tile State



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.

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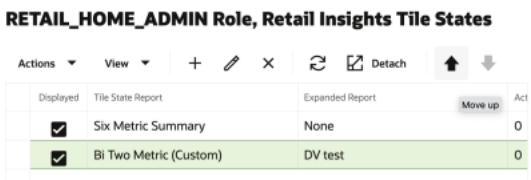
> **Note**
>
> The Favorites and Notification tile states are always the last two tile states respectively and cannot be moved.

Figure 4-18 Move Tile State

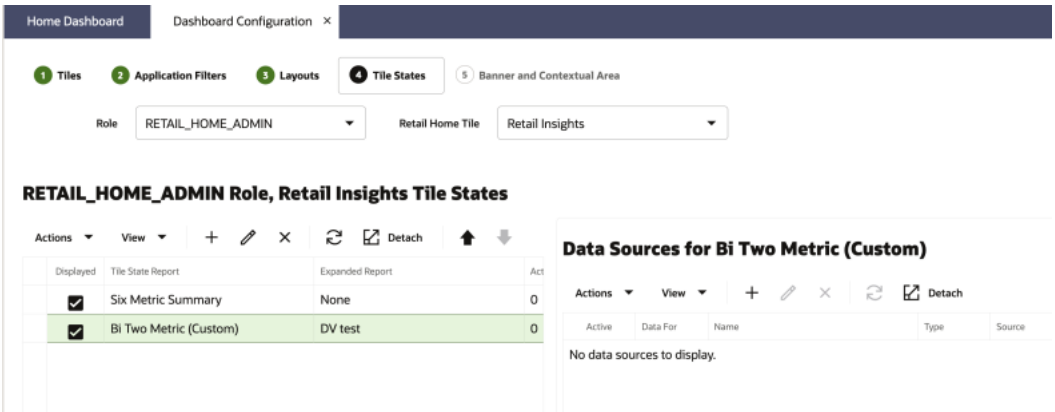


Adding a Data Source

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



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.

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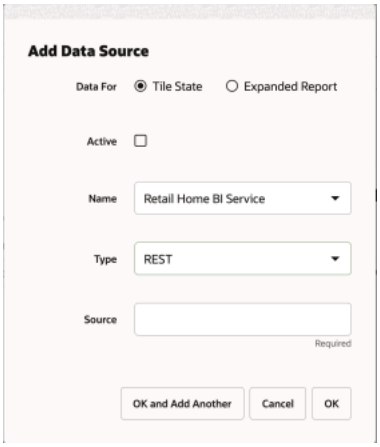
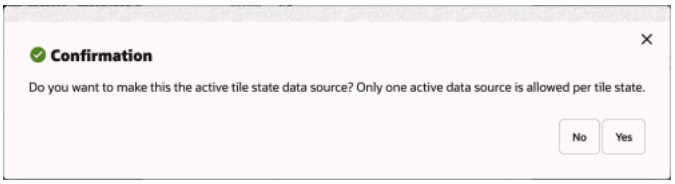
Figure 4-20 Add Data Source



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.

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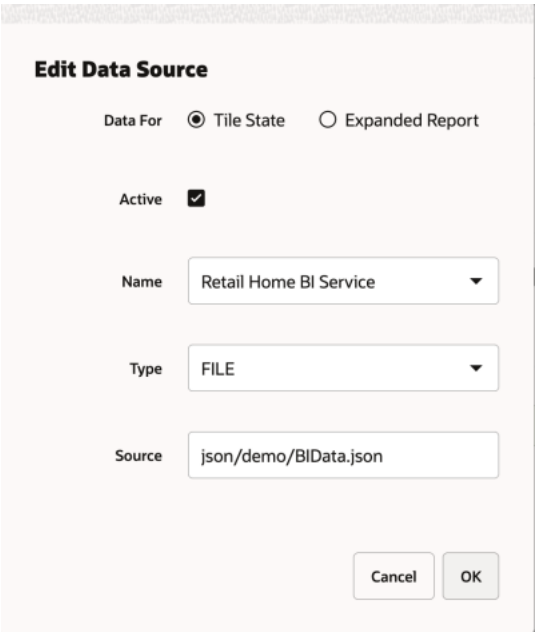
Editing a Data Source

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.

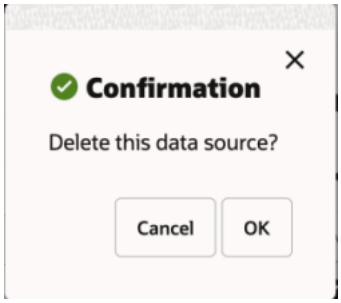
Figure 4-22 Edit Data Source



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



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.

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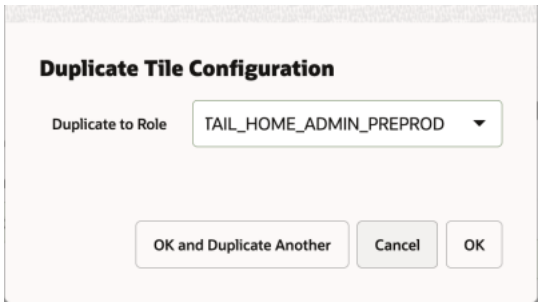
Click the **Duplicate** button at the bottom of the page. Then, use the Duplicate to Role search to find and select the Role to which you wish to duplicate the configuration.

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.

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.

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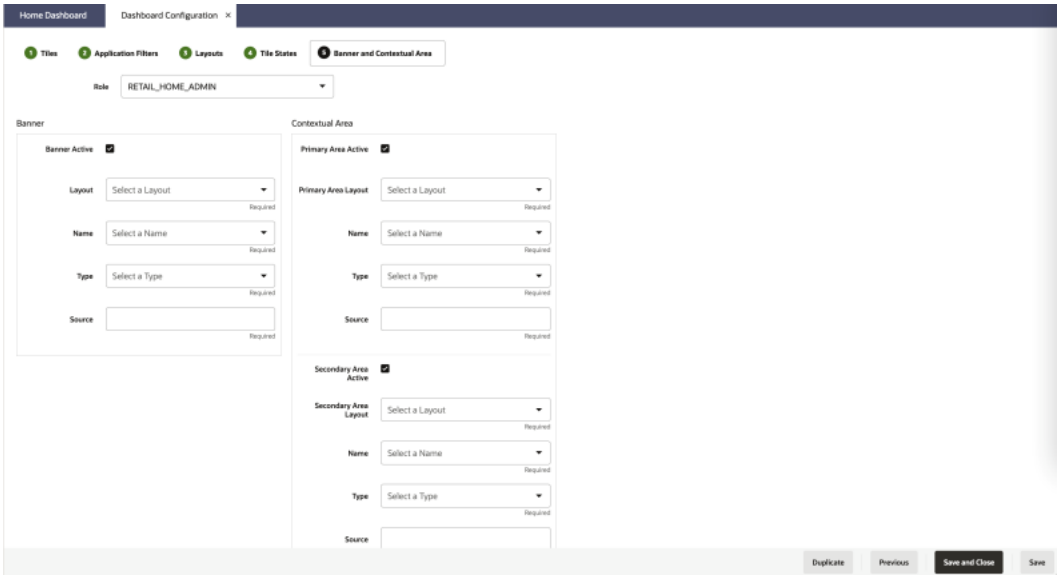
Figure 4-25 Banner and Contextual Area



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.

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Duplicating a Banner and Contextual Area Configuration

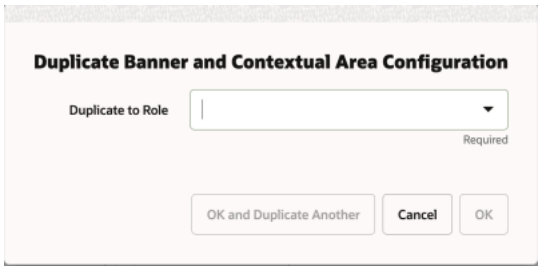
You can duplicate your Banner and Contextual Area Configuration to another role's Dashboard.

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



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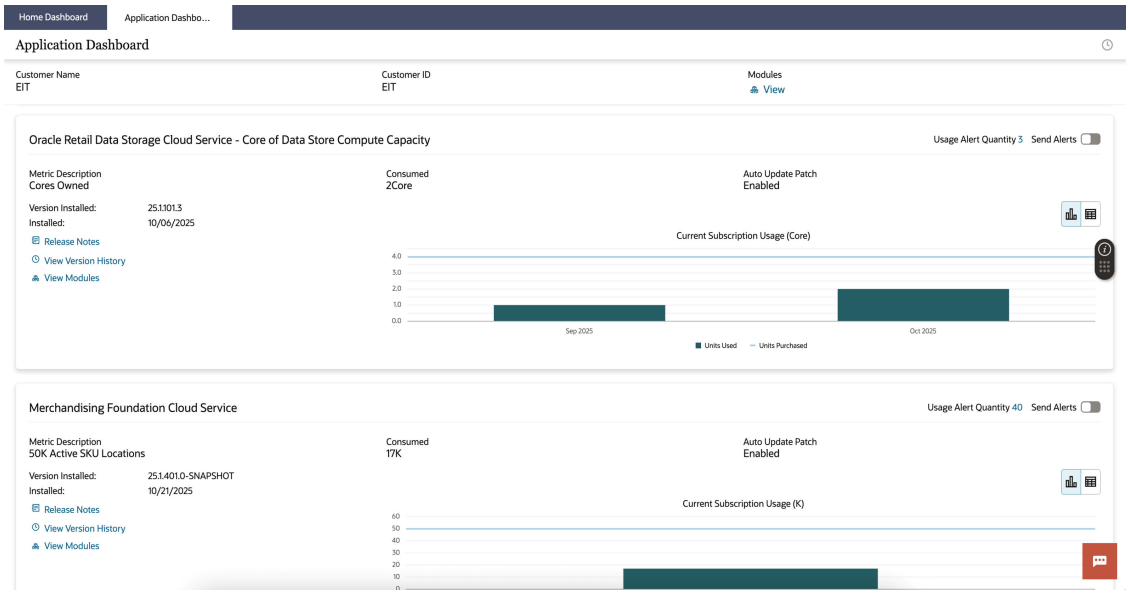
5

Application Dashboard

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

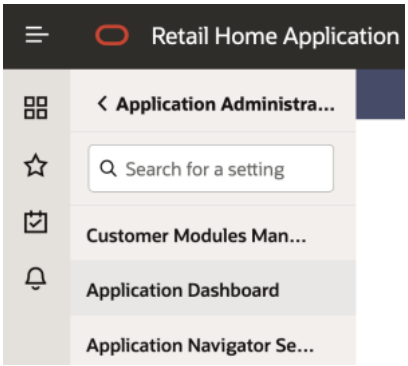
Figure 5-1 Application Dashboard Page



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



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Subscription Metrics

The subscription metrics displays details related to all the applications subscribed by the customer which includes the ability to view usage history, versions installed and turn off alerts for nearing the usage quantity of a subscription. The default value for alerts is set to "on".

Figure 5-3 Application Dashboard Subscription Metrics - Applications with Subscriptions

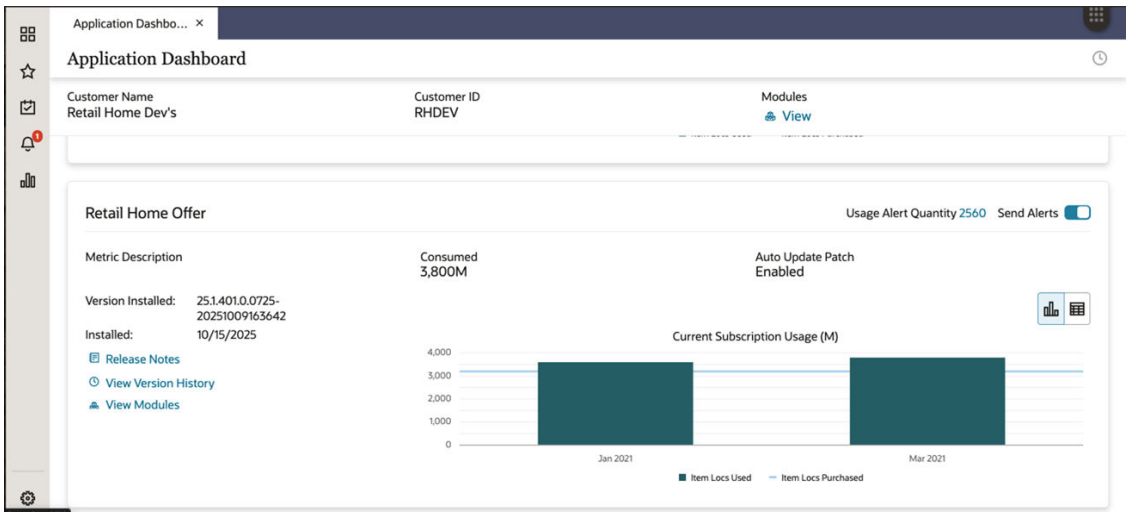

Figure 5-4 Application Dashboard Subscription Metrics - Applications without Subscriptions (Retail Home and POM)

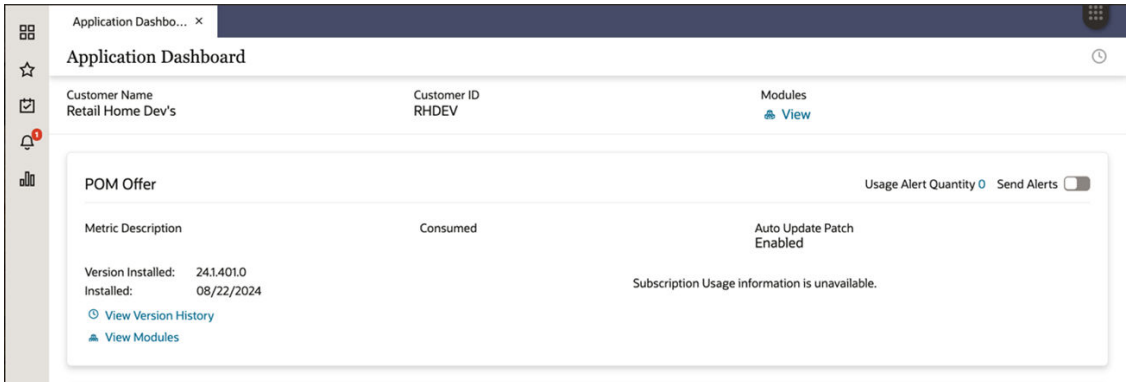

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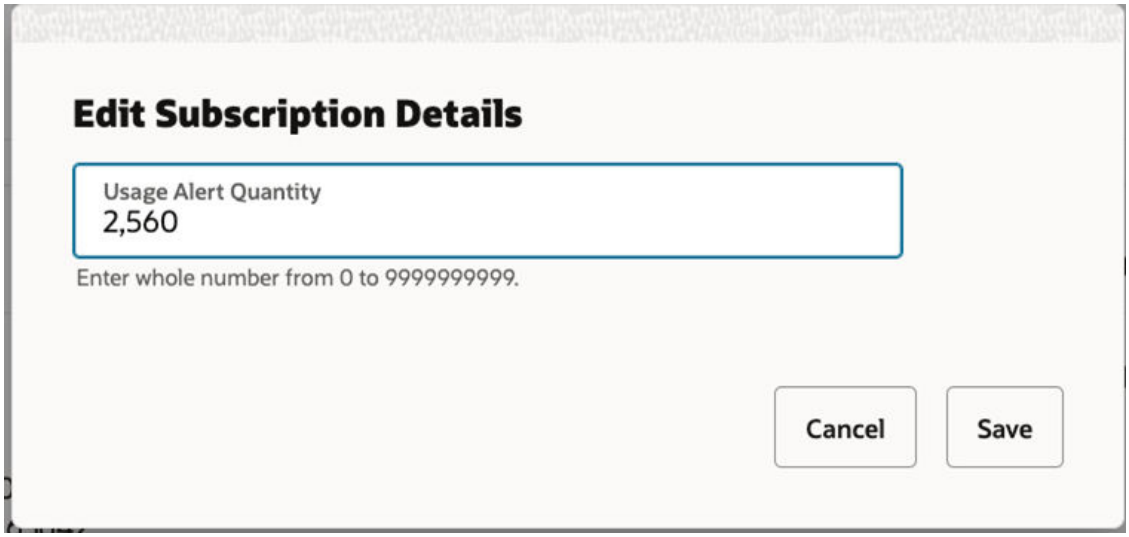
Figure 5-5 Editing Subscription Details



A Retail Home administrator can edit Usage Alert Quantity by clicking on the **Usage Alert Quantity** value for that application and an email alert is automatically triggered accordingly.

> **Note**
>
> A Retail Home administrator needs to update the **Email Address** field for notification type **Alert Created Notifications** for the specified application to receive email alerts. See the Notifications Administration chapter for more details.

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.

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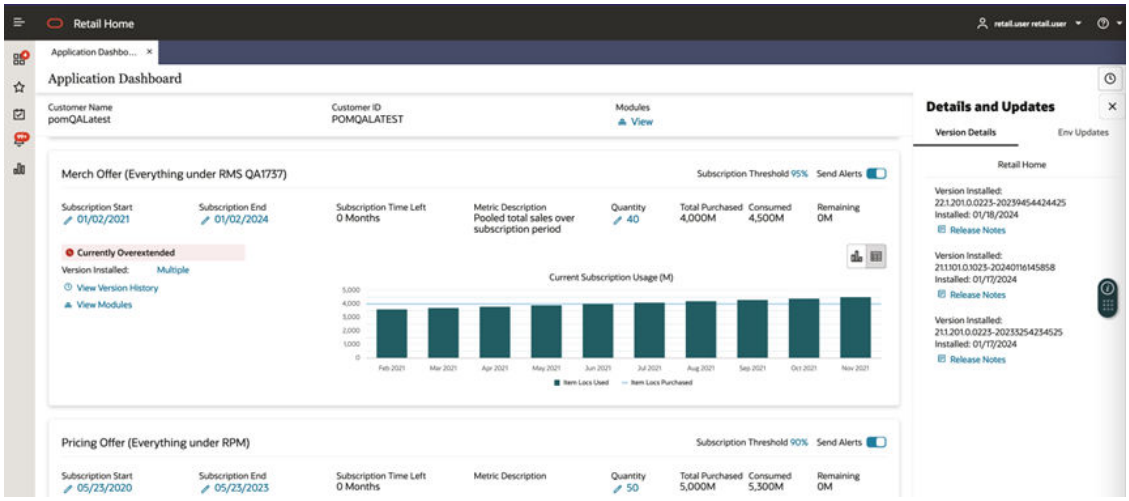
Figure 5-6 Application Dashboard Version History Contextual Pane



Setting Alerts Status

Customer Administrators can turn on and off alerts for triggering an email notification once Usage Alert Quantity exceeds current set value for a subscription. The default value is set to **ON** position.

Figure 5-7 Application Dashboard Setting Alerts Status

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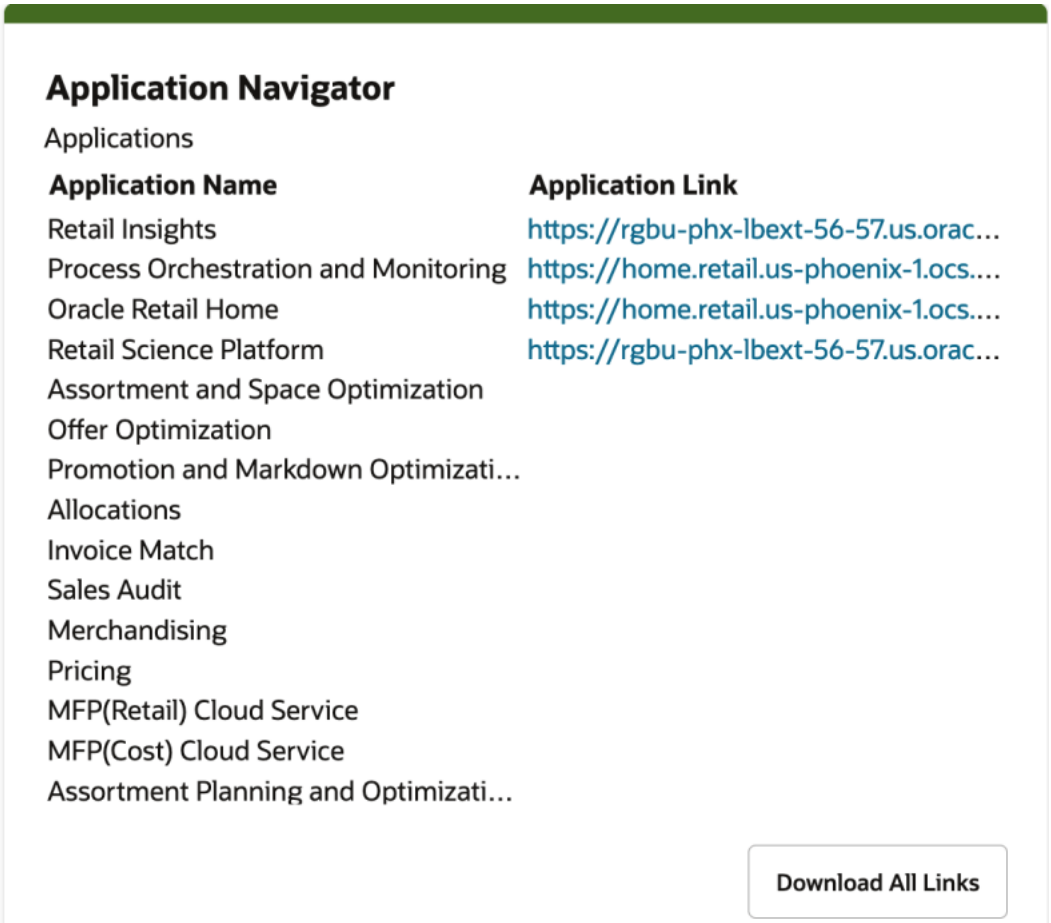
6
Admin Dashboard

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



Subscriptions

This tile displays the following customer subscriptions related information.

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- Number of subscriptions above 80% usage amount.
- Number of subscriptions over usage amount.

Figure 6-2 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.

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> **Note**
>
> The Outage Calendar is in-built and pulled from Object Storage and updates daily. Details must be defined as:
>
> ```
> Primary Area Layout = retailhome.contextualReports.outgageCalendar
> Name = RetailHomeOutageService
> Type = File
> Source = N/A.
> ```
>
> All details are prepopulated, and `Type` and `File` should not be changed

Figure 6-3 Built-In Outage Calendar in Dashboard Configuration

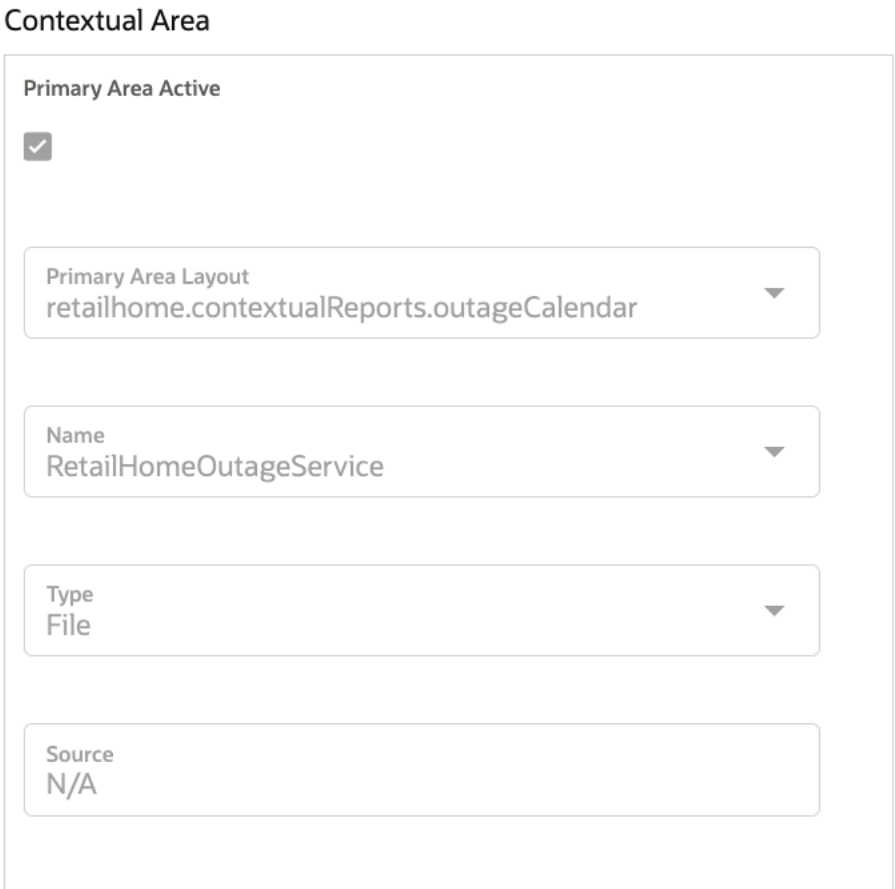

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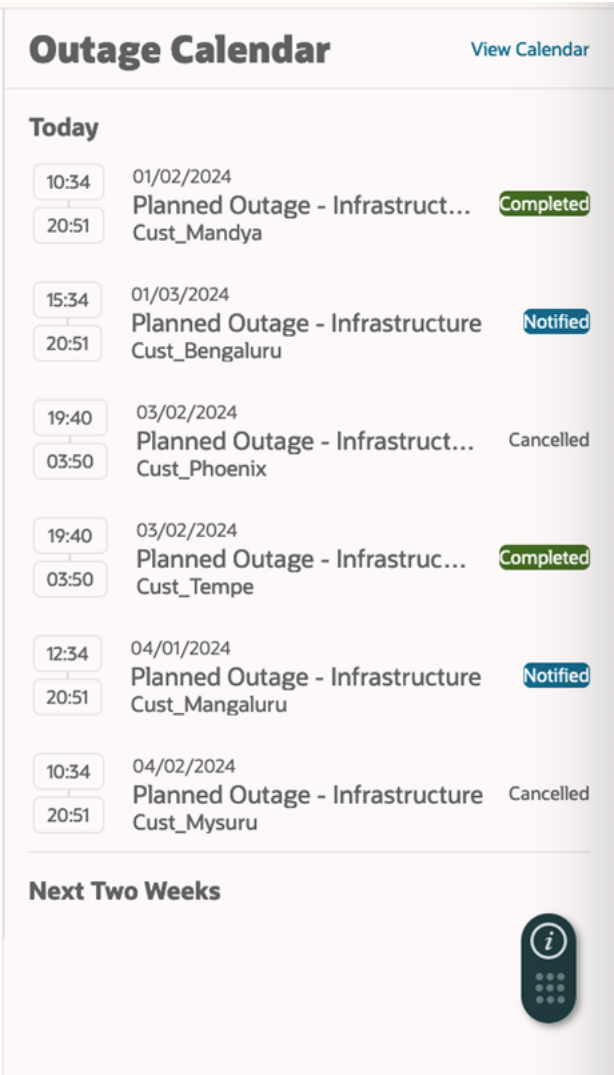
Figure 6-4 Outage Calendar



Click the **View Calendar** link in the upper-right corner to open a new tab listing all upcoming outages in a sortable table. The Outages are categorized as “Current and Future Outages” (which lists the current and planned outages) and “Historical Outages” (which lists the outages that occurred/scheduled for last 6 months).

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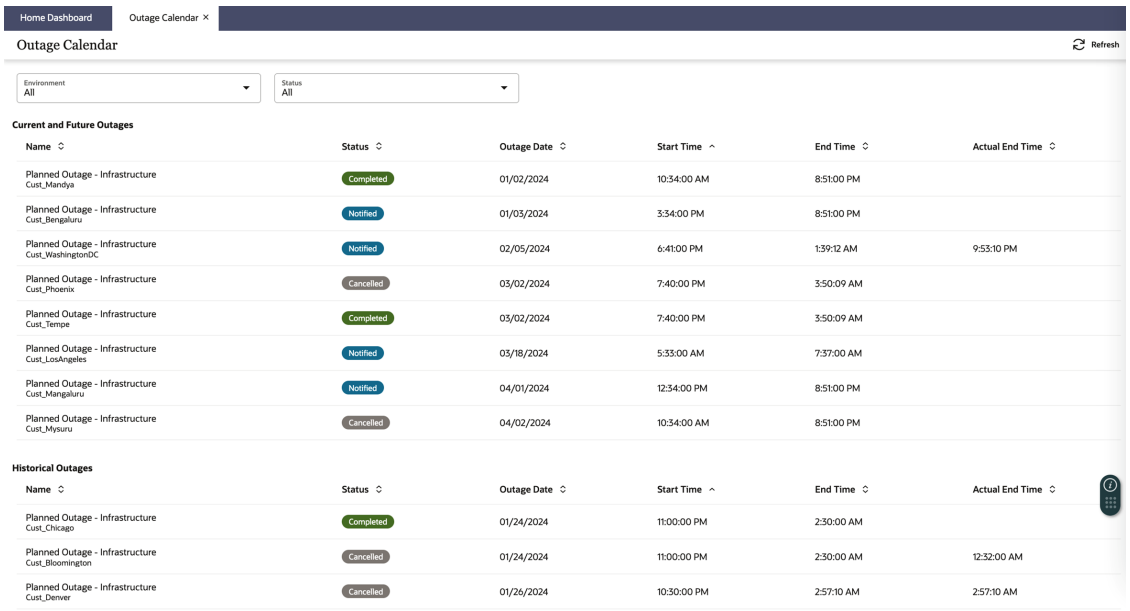
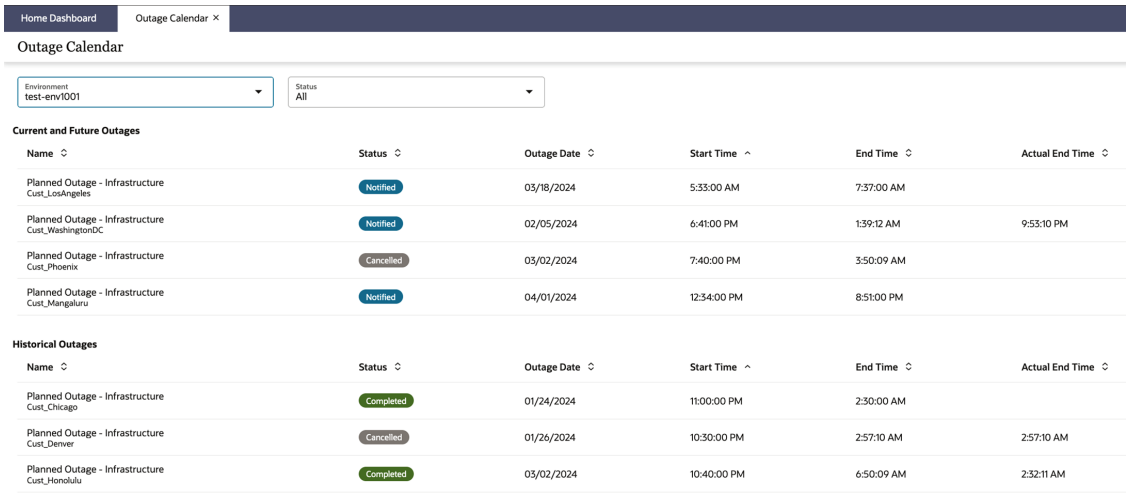


The outages can also be filtered by Environment and Status.



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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

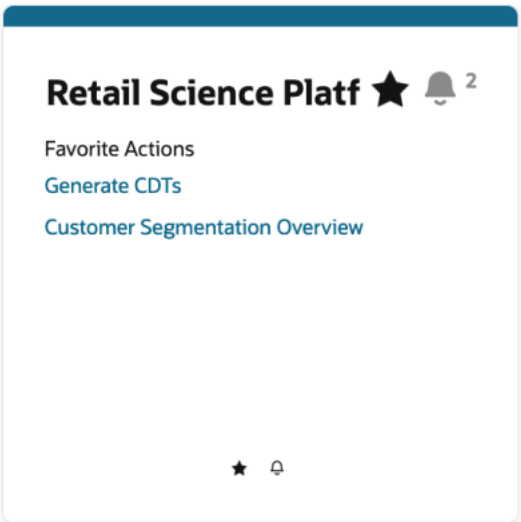

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Table 7-1 Data Source Configuration

Name	favoritesService
Type	REST
Source	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

Name	notificationsService
Type	REST
Source	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

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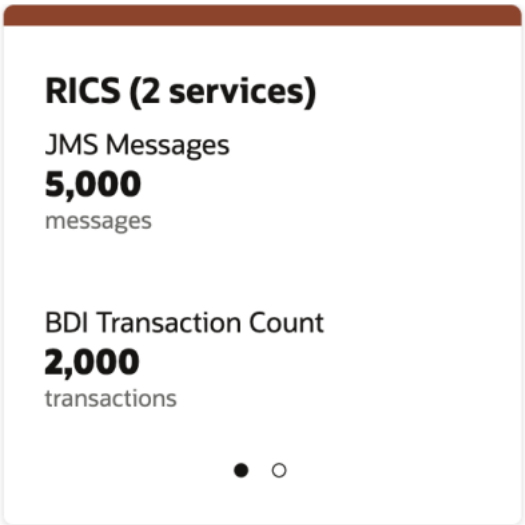

Table 7-3 Data Source Configuration

Name	RetailHomeReportDataService
Type	REST
Source	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.

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Figure 7-1 Eight Metric Summary Sample

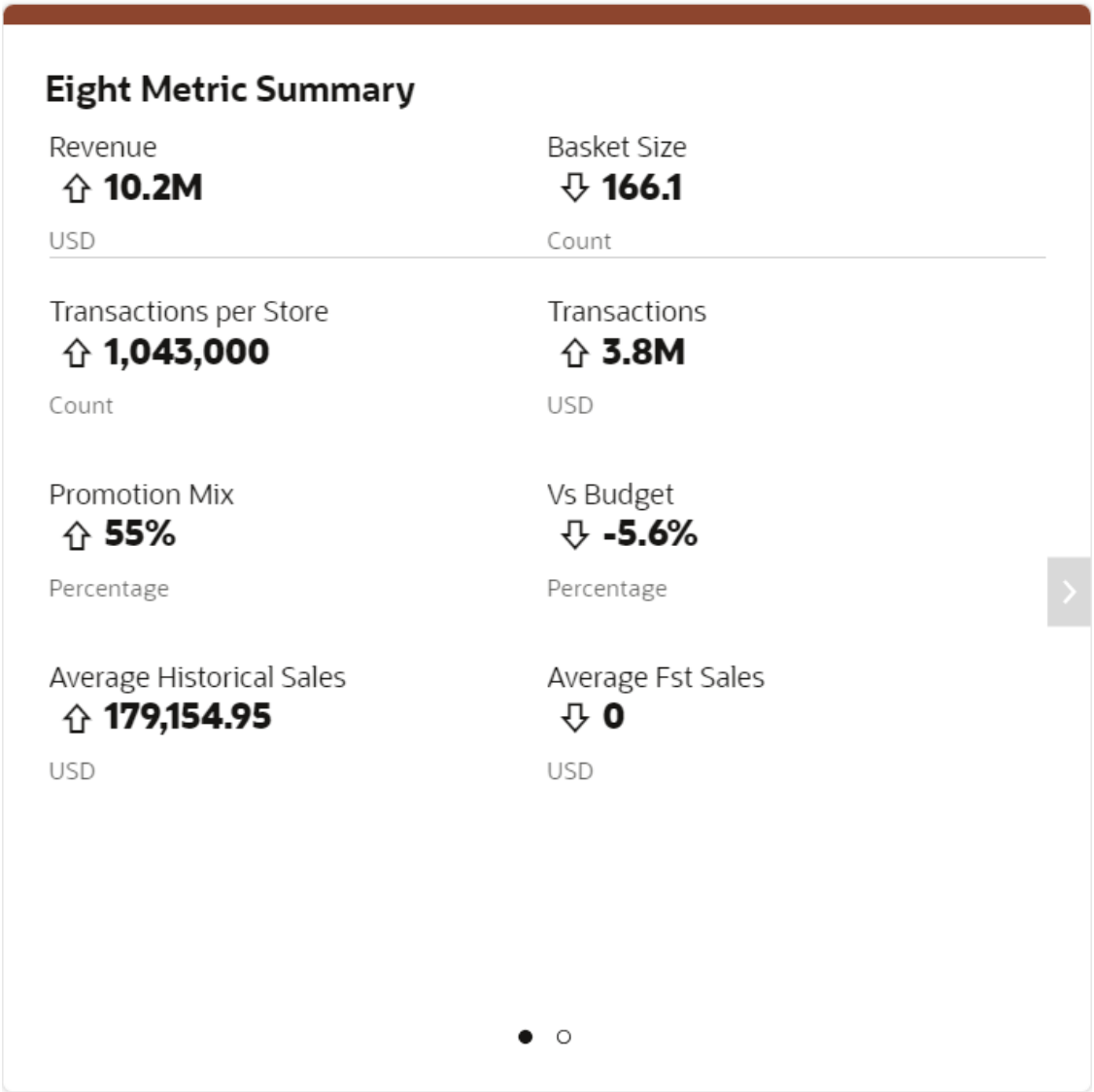

Table 7-4 Data Source Configuration

Name	RetailHomeReportDataService
Type	REST
Source	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.

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Figure 7-2 Twelve Metric Summary Sample

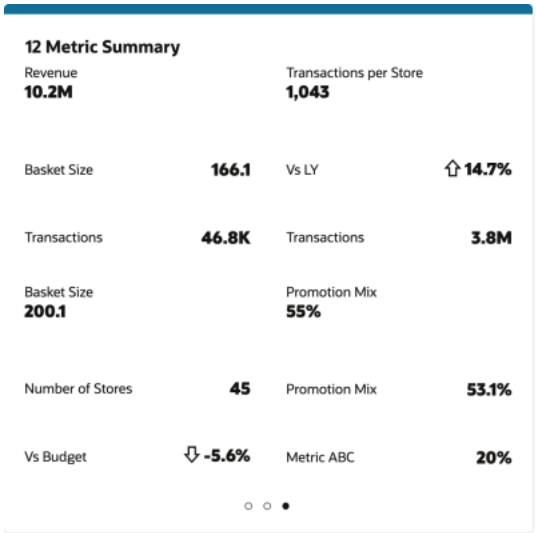

Table 7-5 Data Source Configuration

Name	RetailHomeReportDataService
Type	REST
Source	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.

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Figure 7-3 Four and Six Metric Summary Samples

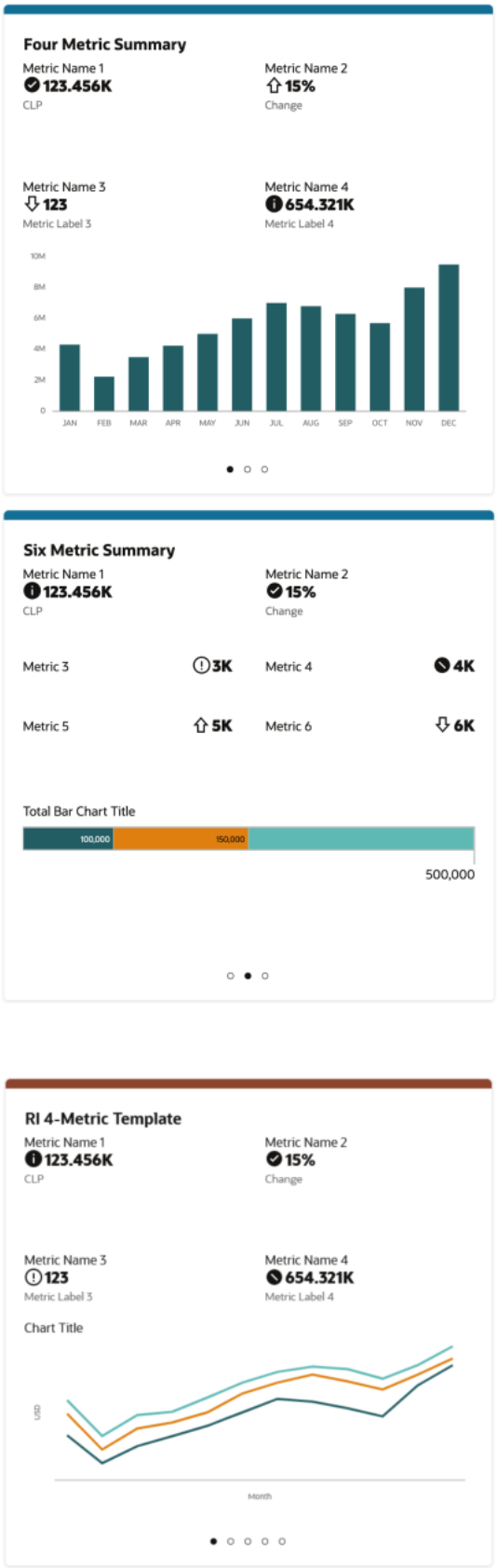

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Table 7-6 Data Source Configuration

Name	RetailHomeReportDataService
Type	REST
Source	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.

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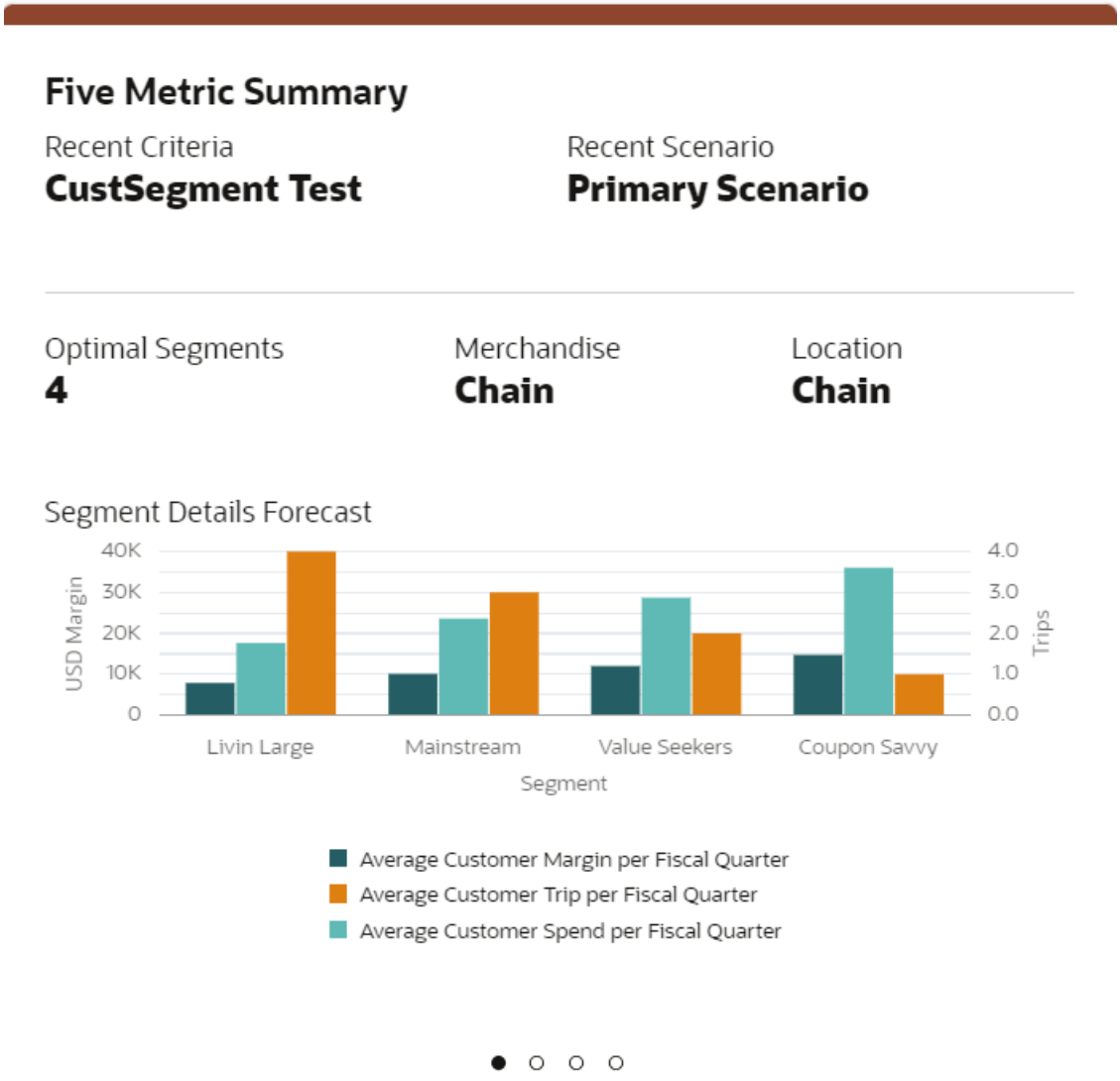
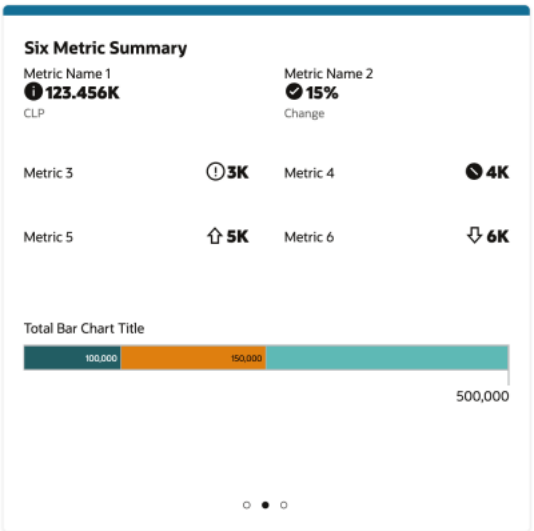
Figure 7-4 Five Metric Summary Samples





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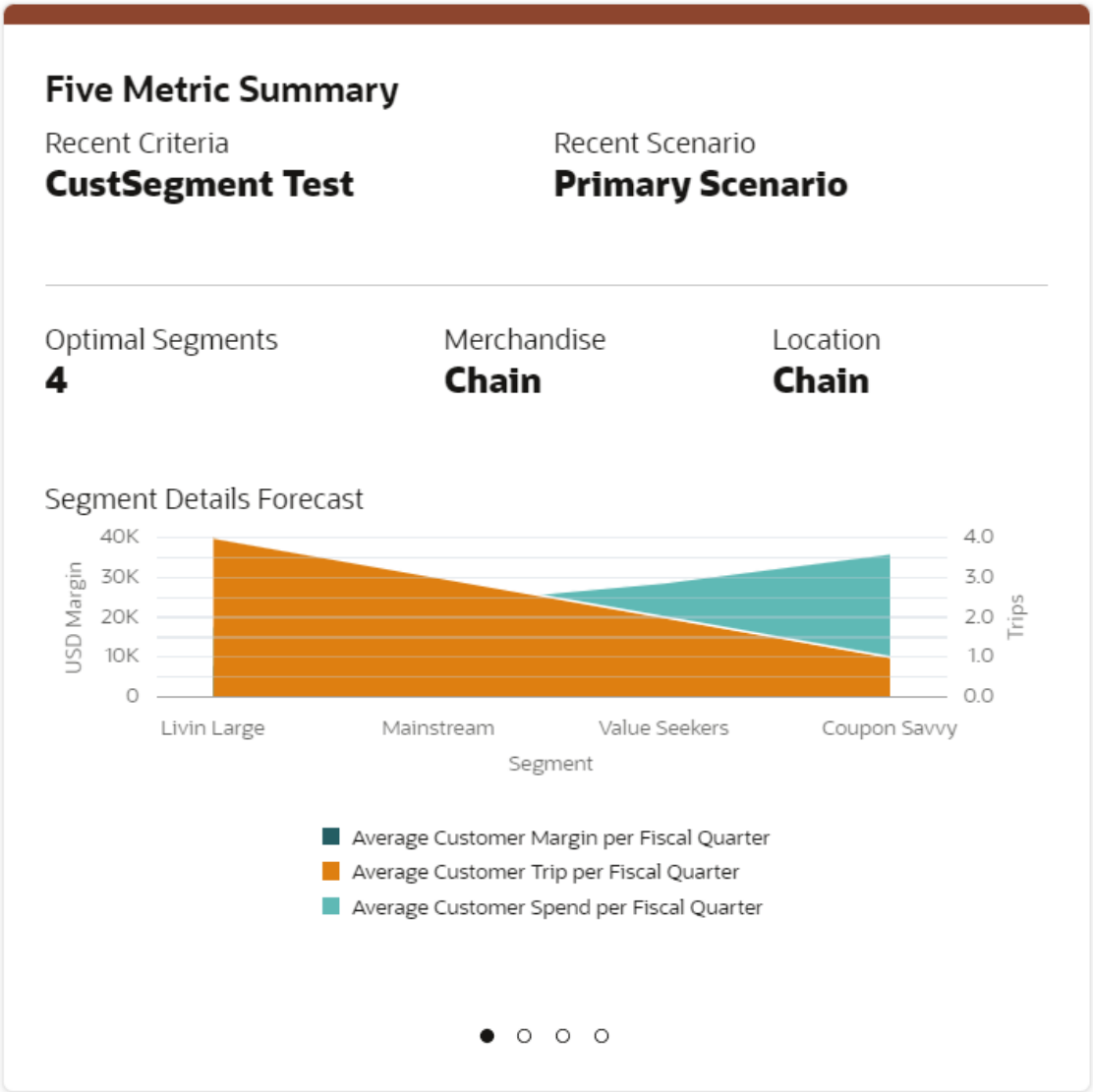

Table 7-7 Data Source Configuration

Name	RetailHomeReportDataService
Type	REST
Source	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.

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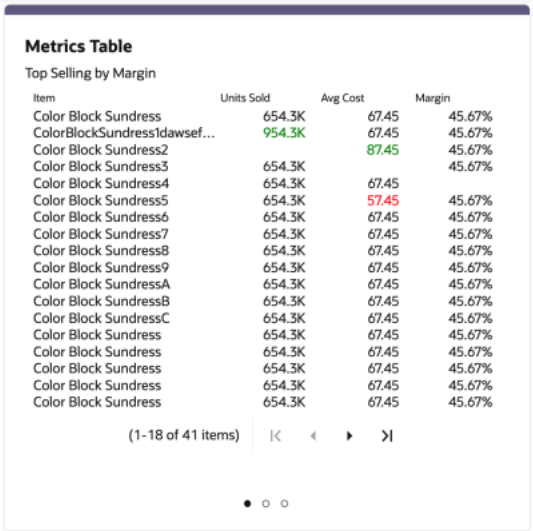
Figure 7-5 Metrics Table Sample



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)

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Figure 7-6 One Metric Table Sample

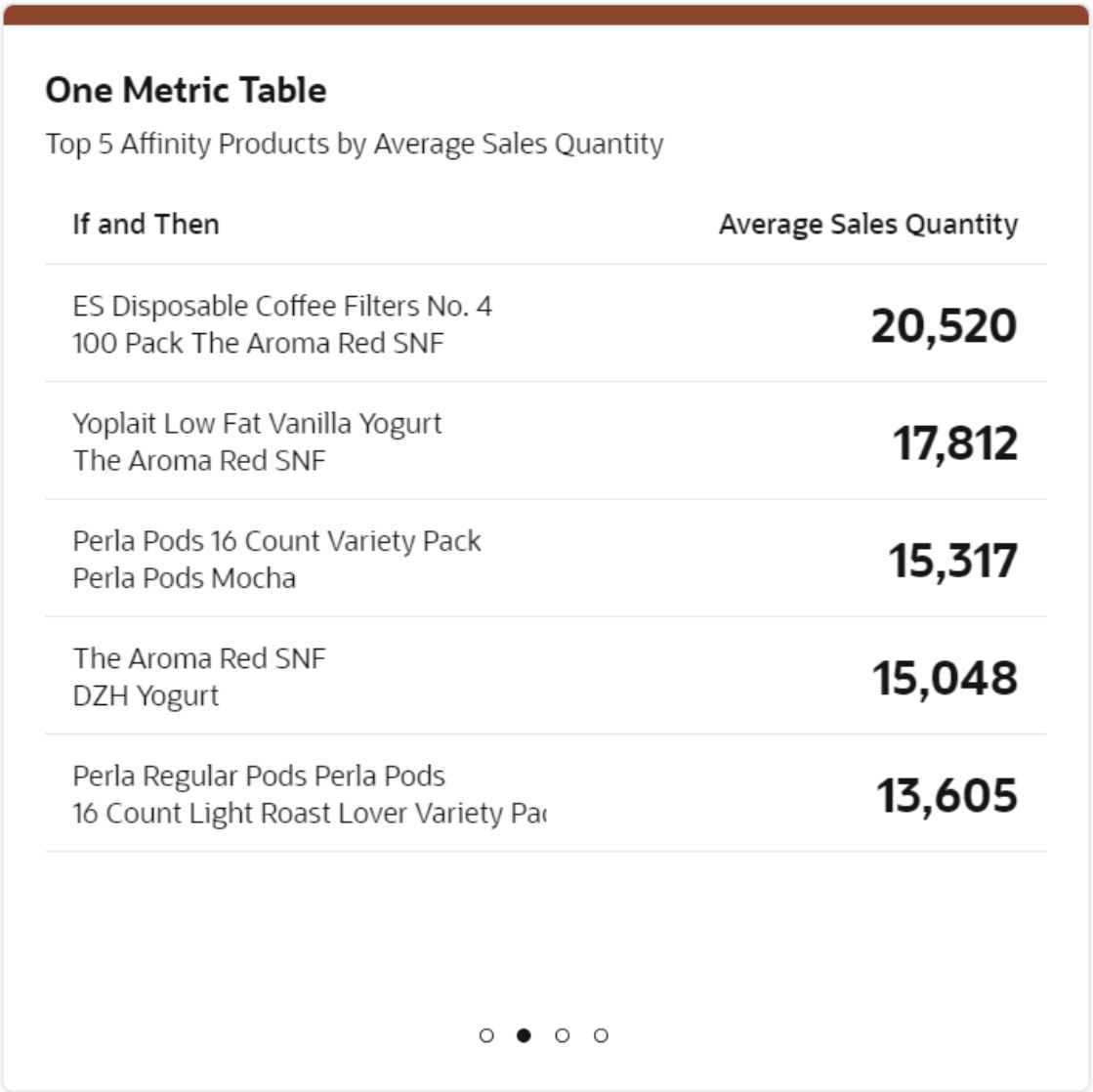

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Figure 7-7 Image Table Sample

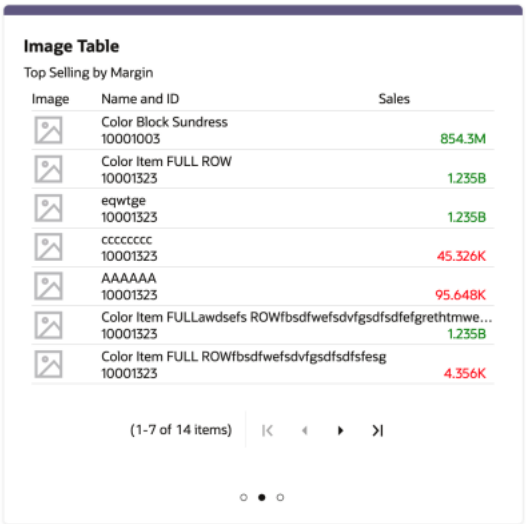

Figure 7-8 Image Metrics Table Sample

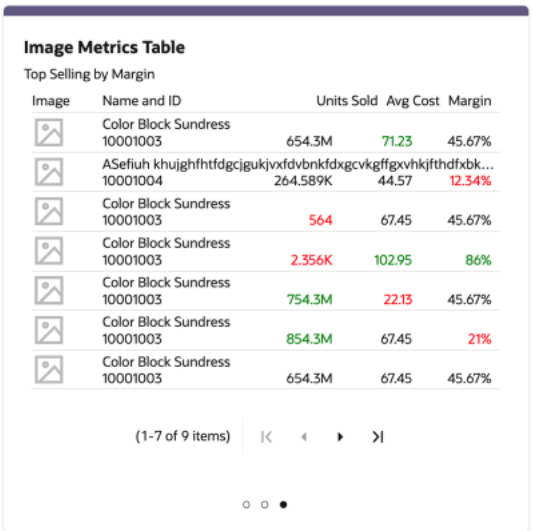

Table 7-8 Data Source Configuration

Name	RetailHomeReportDataService
Type	REST
Source	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.

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Figure 7-9 Demand Transference Sample

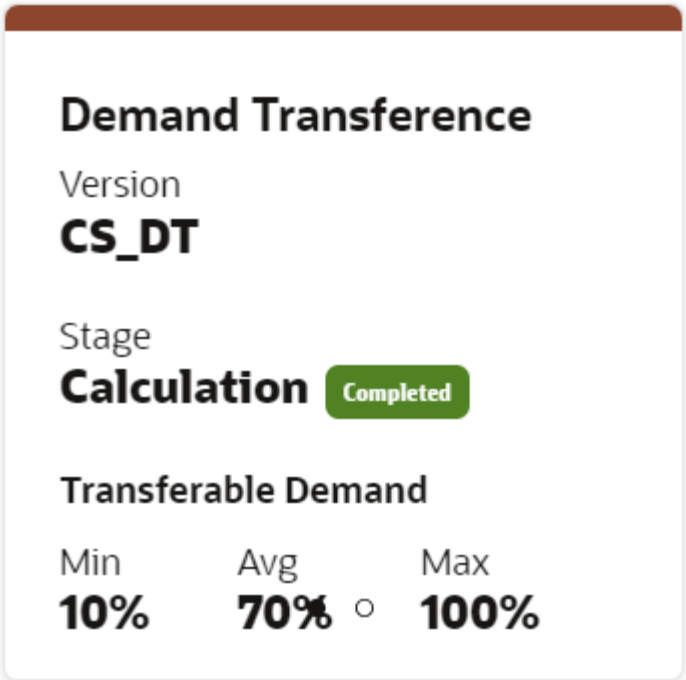

Figure 7-10 ORASE Offer Optimization Sample

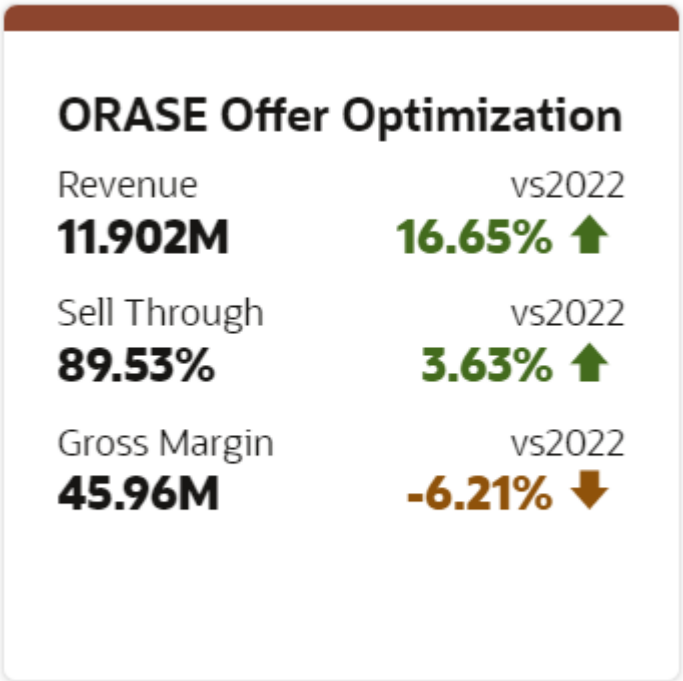

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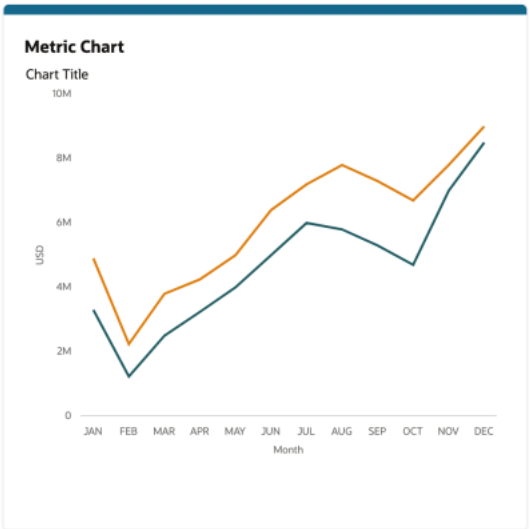
Table 7-9 Data Source Configuration

Name	RetailHomeReportDataService
Type	REST
Source	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 two tiles on the default administrator dashboard that are not intended for user configuration. The 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.

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8
Custom Tile State Reports Configuration

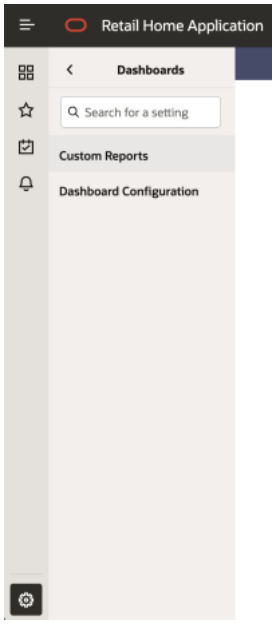
Retail Home not only ships with built-in reports, but also supports the creation of custom tile state reports from within the application.

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.

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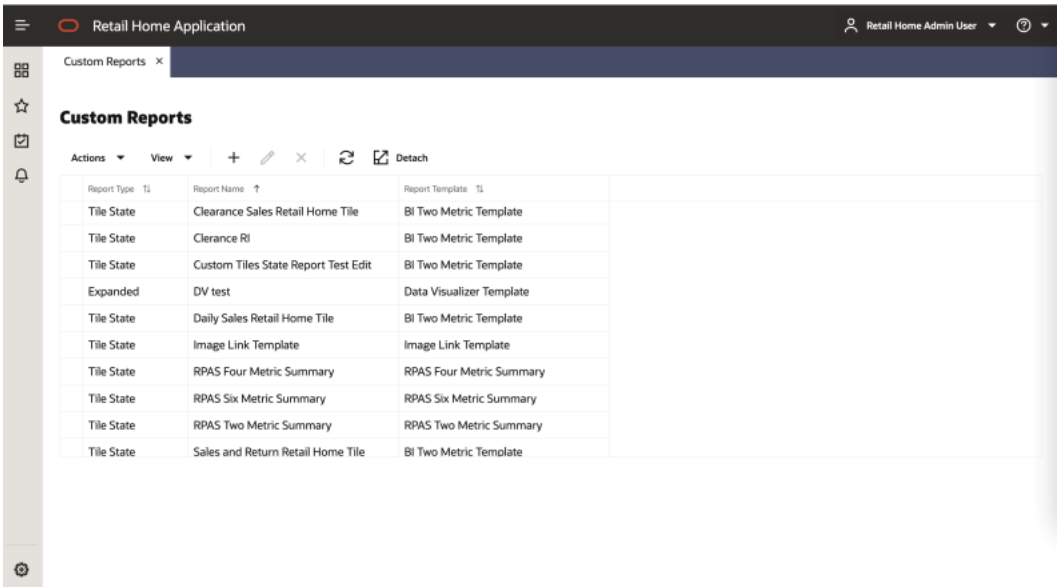
Figure 8-2 Custom Tile State Reports



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.

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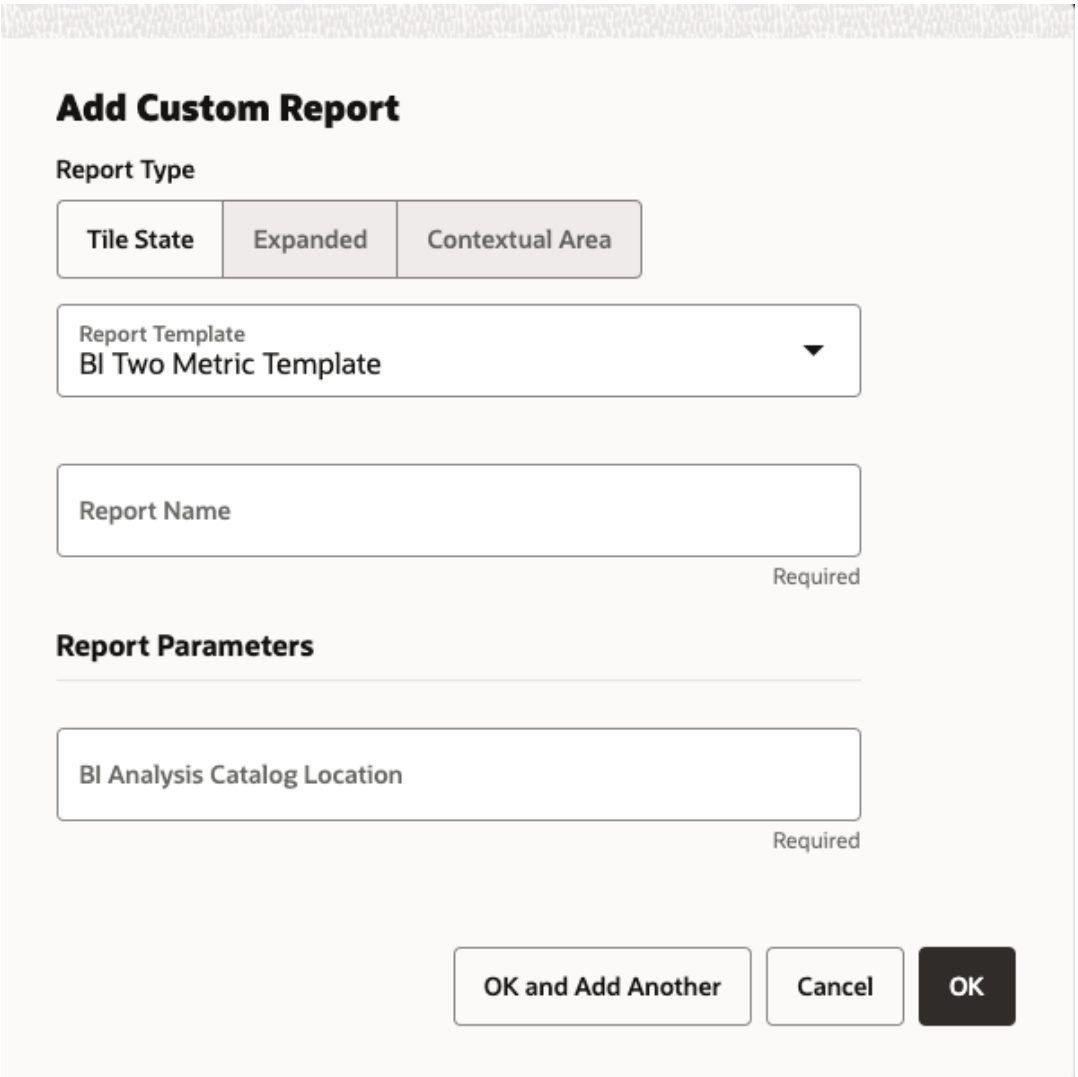
Figure 8-3 Add Custom Tile State Report



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.

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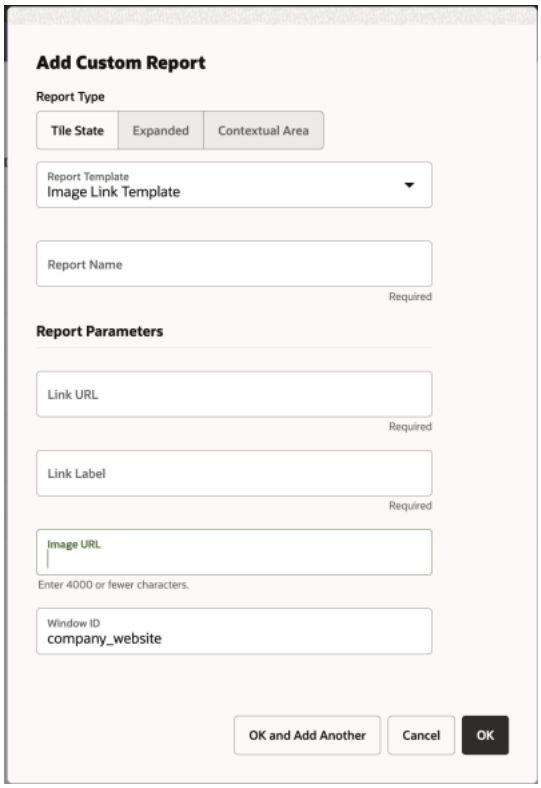
The following figure shows a tile state report that renders the Oracle Retail logo and launches to the Oracle Retail website.

The following screenshot shows the Image Link Template report parameters.



The Image Link Template has the following parameters:

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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:

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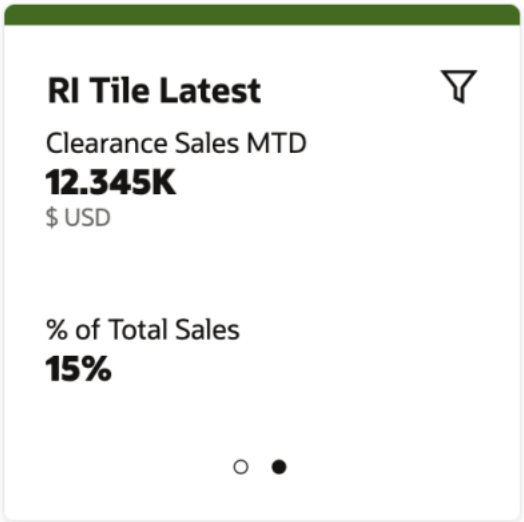
Figure 8-4 Tile State Example



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:

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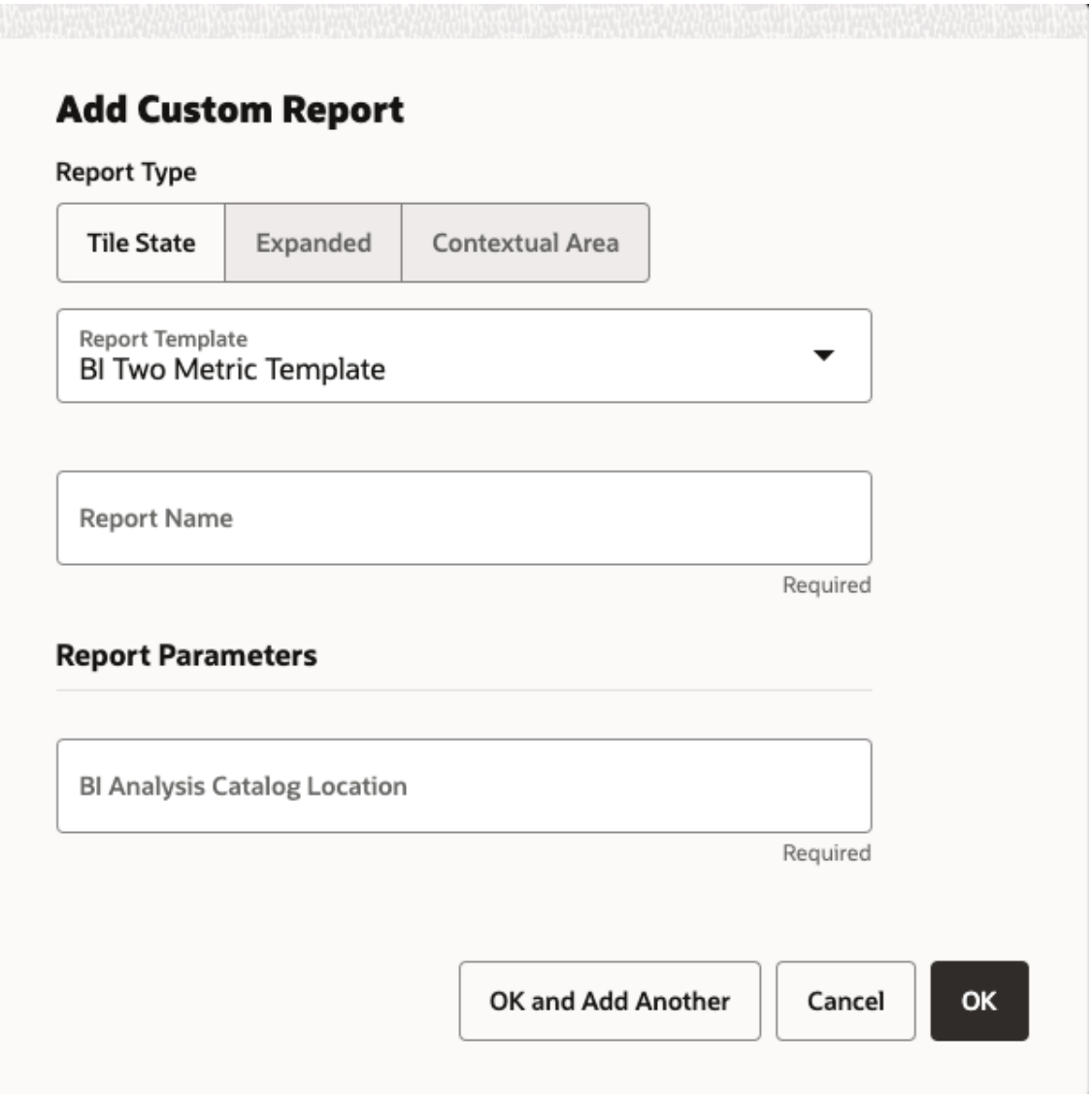

BI Analysis Catalog Path

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`

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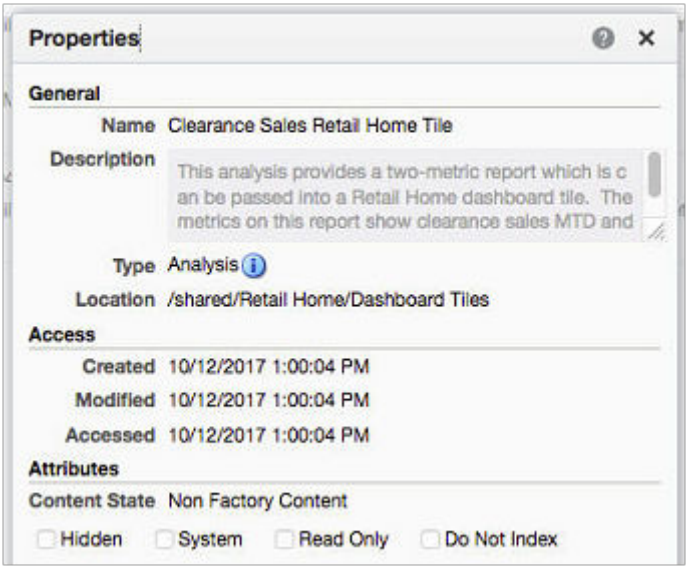
Figure 8-5 Clearance Sales Retail Home Tile - Analysis Path



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.

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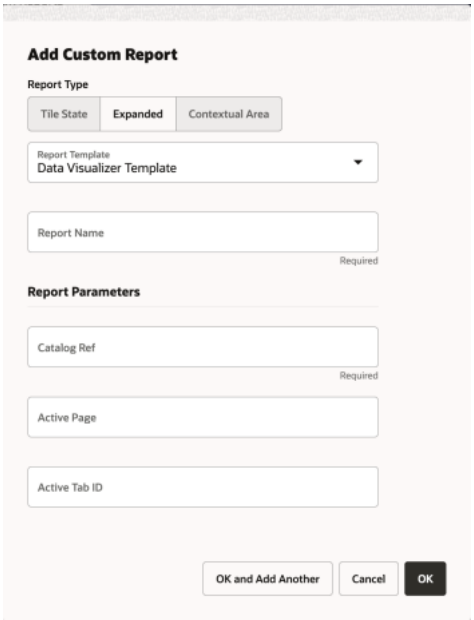

The catalog reference is retrieved in the same way as for the BI tile states. The default view of the data visualizer report can be controlled using the optional active page and tab ID values. Refer to the Data Visualizer documentation on embedded views for more information on what values to enter for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

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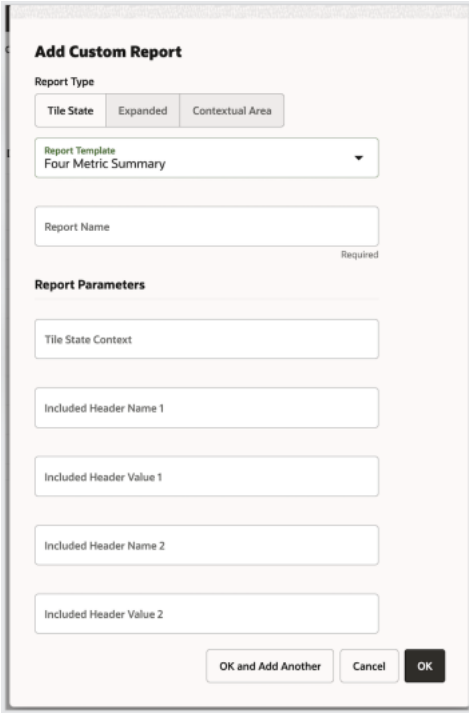

Administrators can configure the report to include or exclude specific headers when sending requests to the service. Additionally, this template supports sending a tileStateContext query parameter based on the RPAS templates, which consuming applications can use to send additional configuration data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

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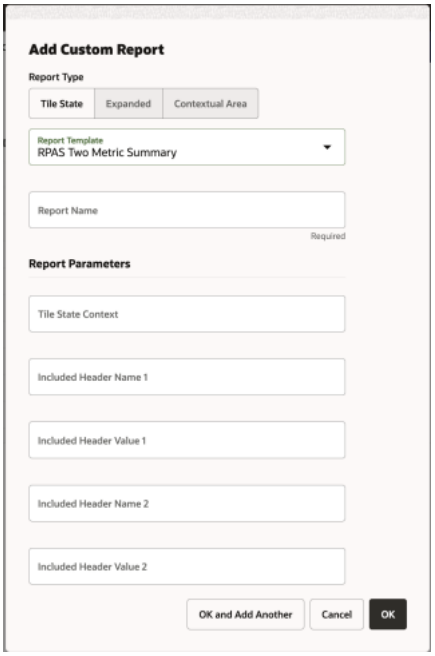

The template has the following features:

- 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.

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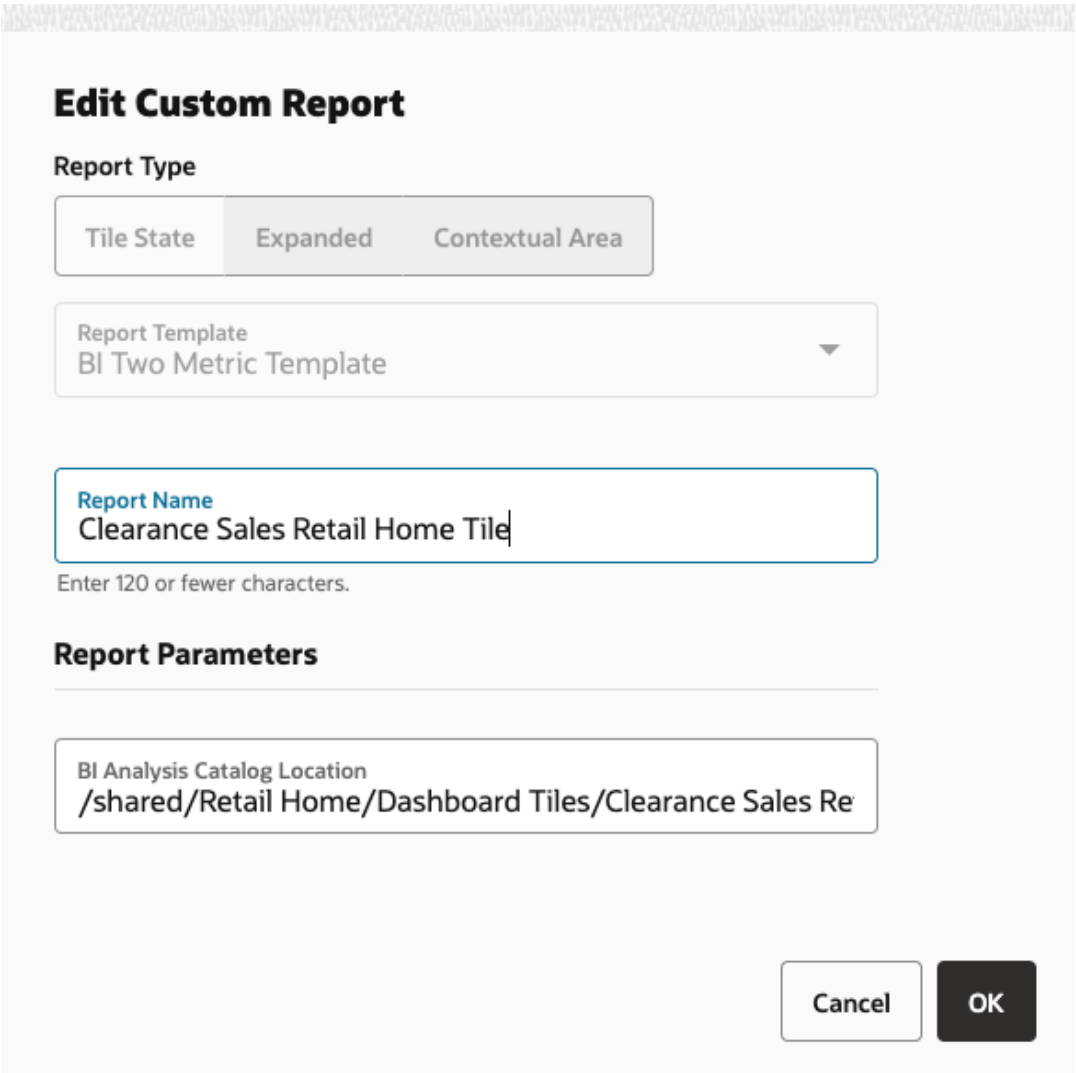
Figure 8-6 Edit Custom Tile State Report



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**.

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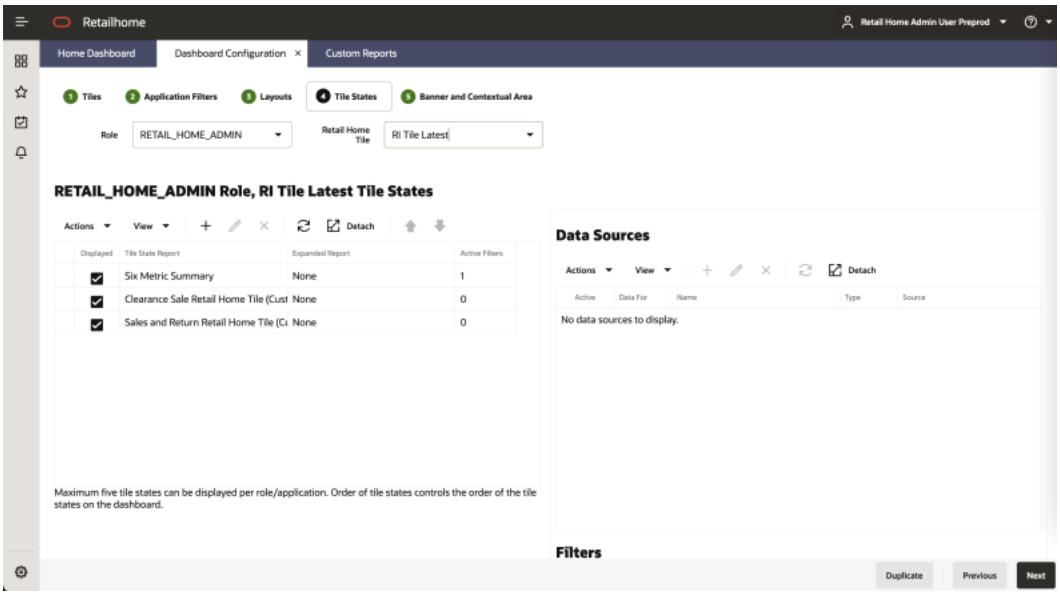
Adding a Custom Tile State Report to a Tile State

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



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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
NAME	Yes	The name of the metric value. This is displayed above the metric value.
VALUE	Yes	The metric value itself.
VALUE_FORMAT	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.
VALUE_LABEL	No	An optional label that further describes the metric value (e.g. a currency code). This label is displayed below the metric value.
INDICATOR	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:

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Table 9-2 Format Values

Format Value	Meaning	Example
PC	Percent	Formats 0.045 as 4.5%
S	Short Number	Formats 9950000 as 9.95M
N	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
up	An upward pointing arrow
down	A downward pointing arrow
normal	A normal severity indicator.
info	An info severity indicator
important	An important severity indicator
critical	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
```


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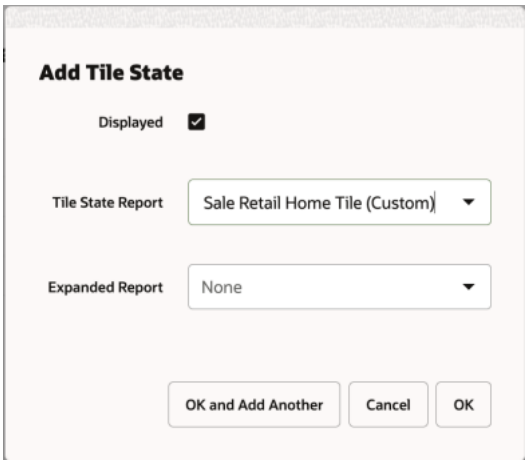
```
union
select
  'Order Count' NAME,
  8 VALUE,
  NULL VALUE_FORMAT,
  NULL VALUE_LABEL,
  NULL INDICATOR
from dual
```

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**.



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**.

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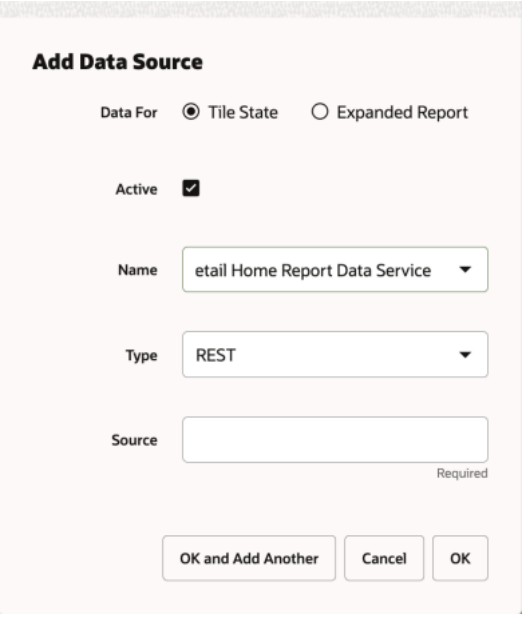

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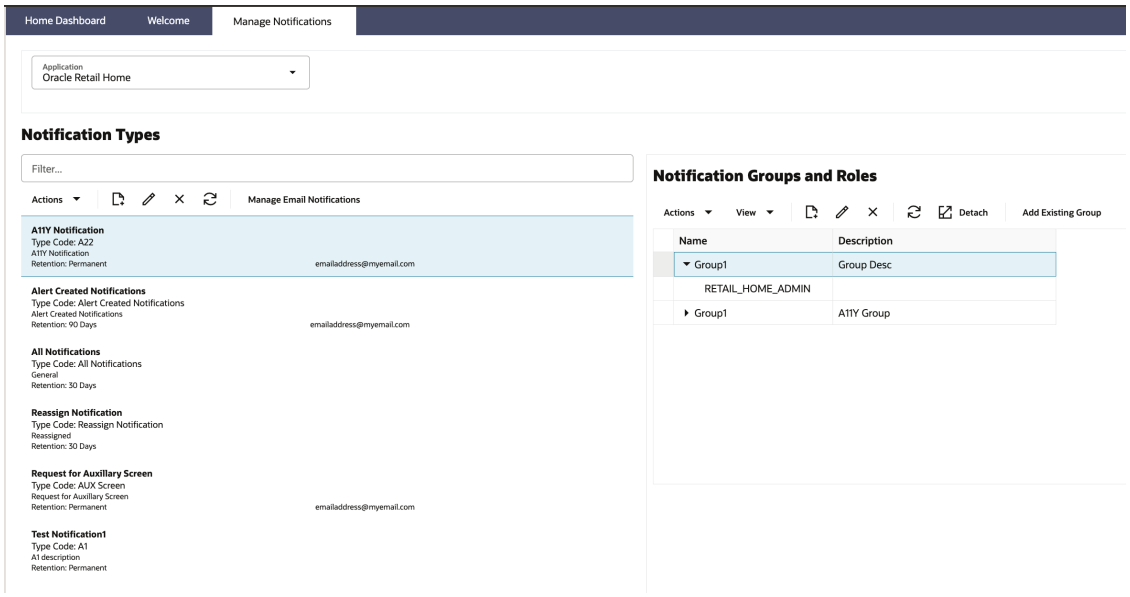
10
Notifications Administration

Oracle Retail 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.

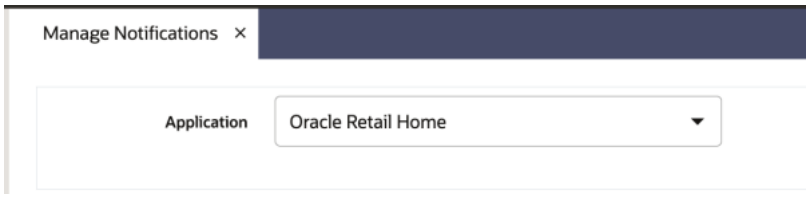
Manage Notifications

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.



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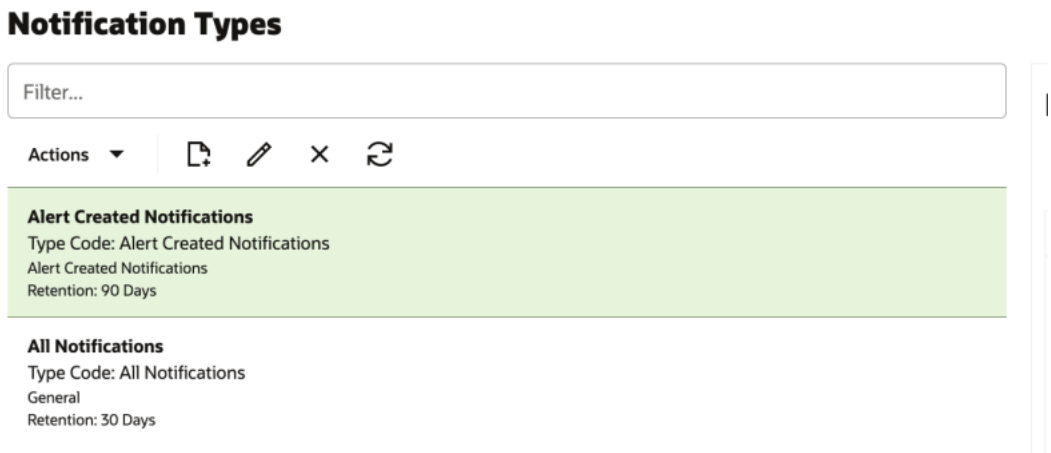
Notification Types

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 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 email address field also allows multiple email addresses; multiple email address must be comma-separated with no spaces.

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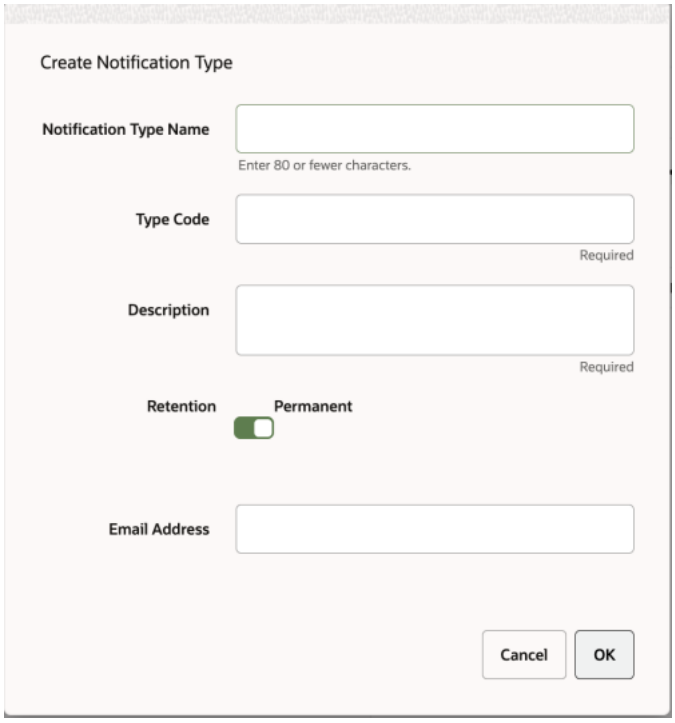
> **Note**
>
> Notifications can be configured to send an email to both individual email addresses and to distribution lists. If an individual email address or an email address within the distribution list is not valid, this will cause a bounce. If the bounce repeats beyond a certain threshold, it causes all email addresses and distribution lists for the subject notification to be placed in a suppression list. This in turn blocks all subsequent email notification of the same type from being sent to all recipients. To prevent this from occurring, customers need to make sure none of the individual email addresses or email addresses within their distribution lists used in the above field are invalid.

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.



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.

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Removing a Notification Type

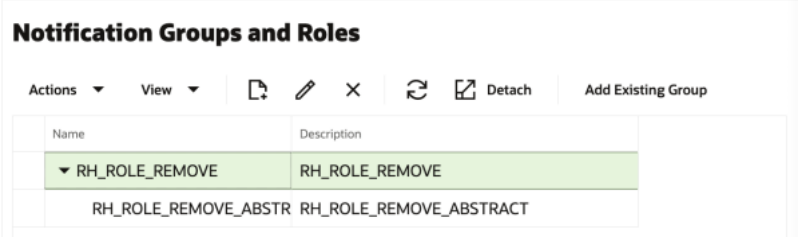
To remove a notification type, the user must first select the notification type to be removed. The user must then select the Remove button from the toolbar or the Remove item from the Actions menu. The user will then be presented with a confirmation popup. If the user clicks OK, the notification type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



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.

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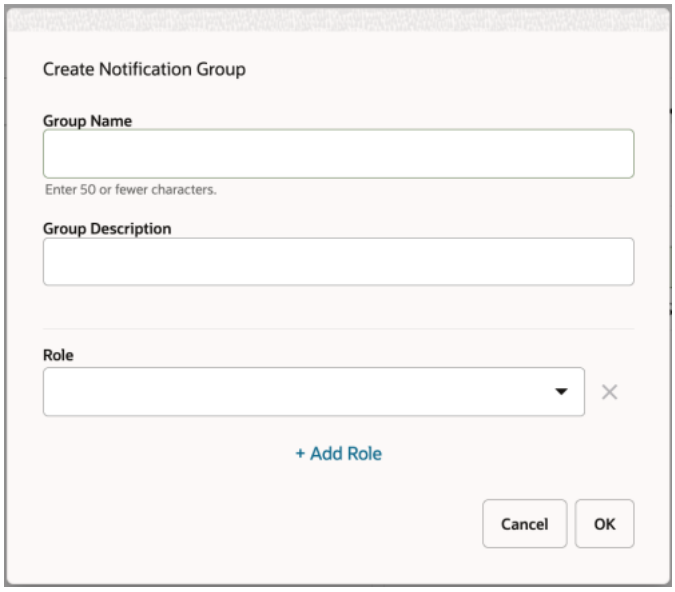
Figure 10-1 Create Notification Group



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.

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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

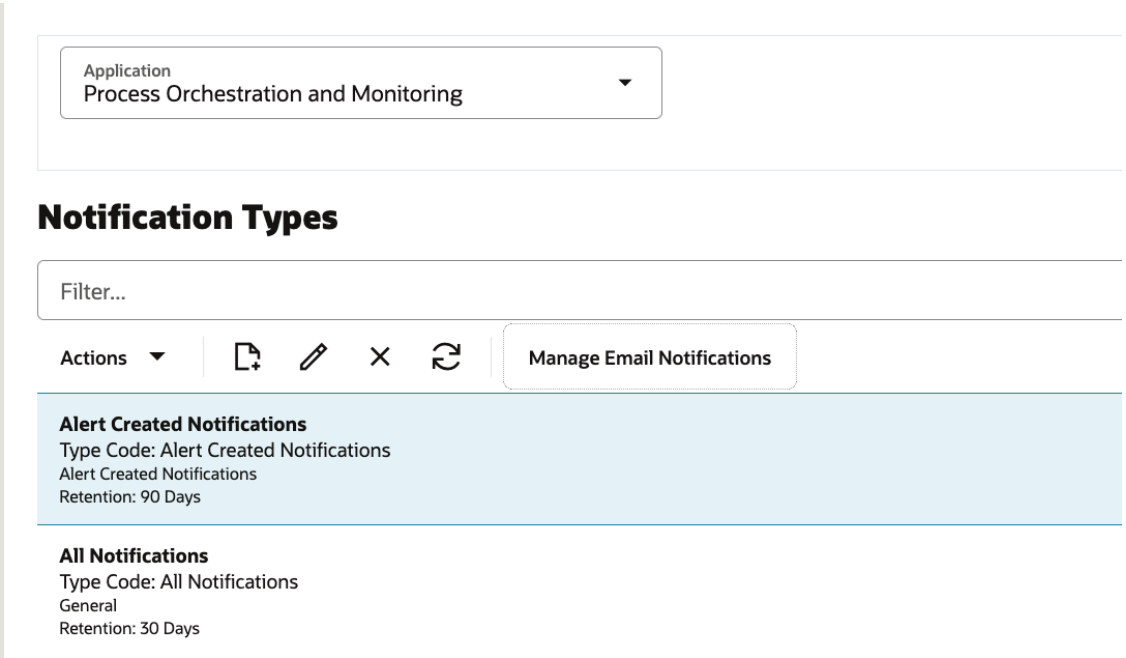
The user may detach the Notification Groups and Roles region from the page, causing it to appear as a popup. To do this, the user must select the **Detach** button from the toolbar or the **Detach** item from the View menu. To reattach the region to the page, the user must select the **Detach** button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

Manage Email Notifications

Retail Home Administrators can now configure and update email addresses at various levels. For instance, in the POM application, which supports notifications at both schedule and job levels, notifications will be sent to the email address(es) specified for each configured level.

To configure an email address, users must select an application from the **Application** dropdown and choose a **Notification Type**. This action enables the **Manage Notification Type** button, which opens a pop-up window for configuring email addresses.

For example, if the POM application is selected and email addresses are configured at multiple levels, notifications will be sent to all email addresses associated with the parent levels of the item triggering the notification. For instance, if a Schedule is configured with email A and a Job within that Schedule is configured with email B, a notification for that Job will be sent to both email A and email B.



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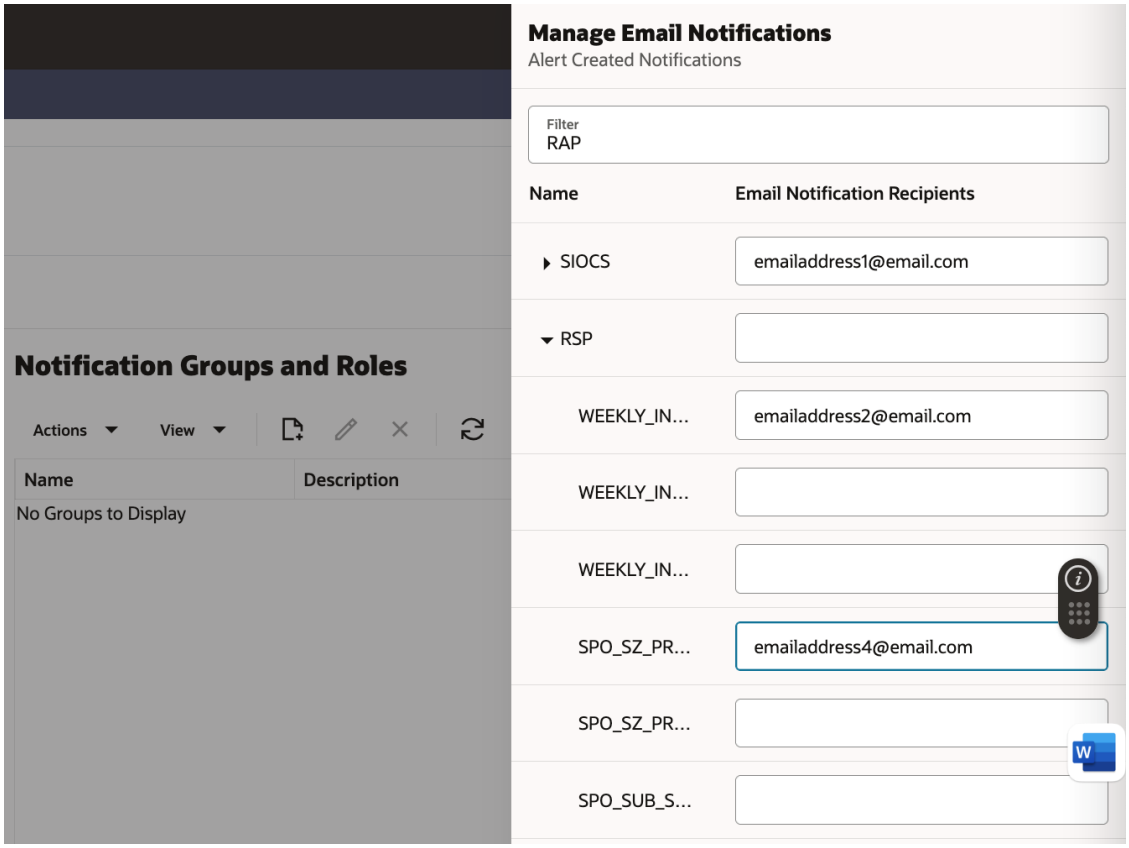

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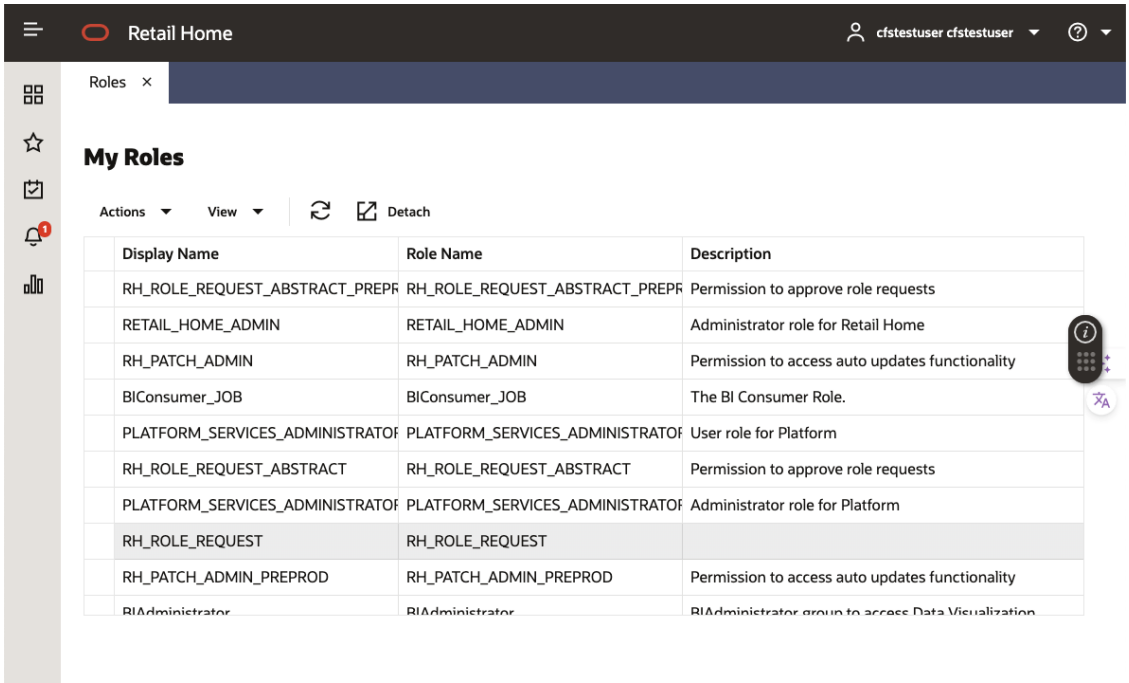
11
Roles

Retail Home users can access the My Roles screen by navigating to **Roles** under the **Tasks** menu to see their current access roles.



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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

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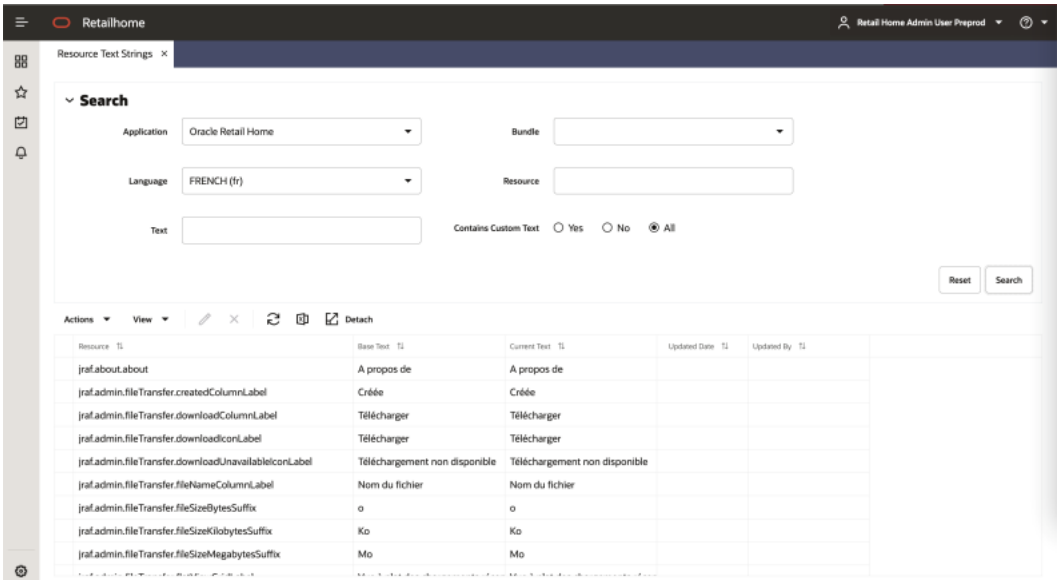
Resource Text Strings

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.

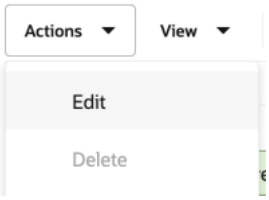
Figure 12-1 Resource Text Strings Screen



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



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Add or Edit

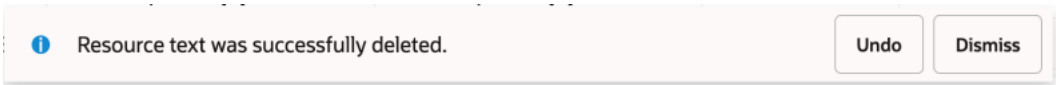
The user can add or edit the custom text for a resource using the Edit menu item or the pencil icon. If no custom text is present for a resource, a new custom text will be added. If a custom text is already present for a resource, it will be modified. The Updated Date and Updated By columns will be changed 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

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.

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Importing Customizations from a CSV File

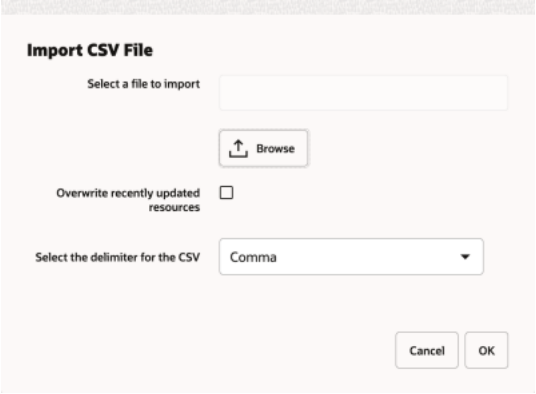
The user can change the values in the Text column of an exported CSV, and then import the CSV file through the Imports Management screen. See the section below titled Imports Management for more details about the Imports Management screen. When the user does this, the values of the Text column are imported 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.

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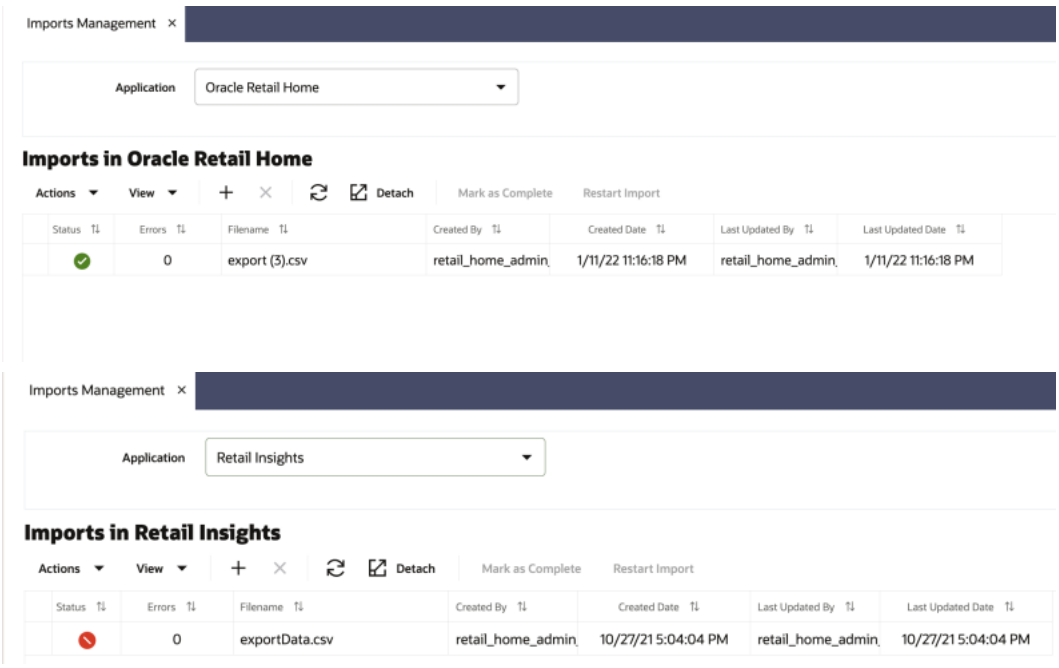
Imports Management

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 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.

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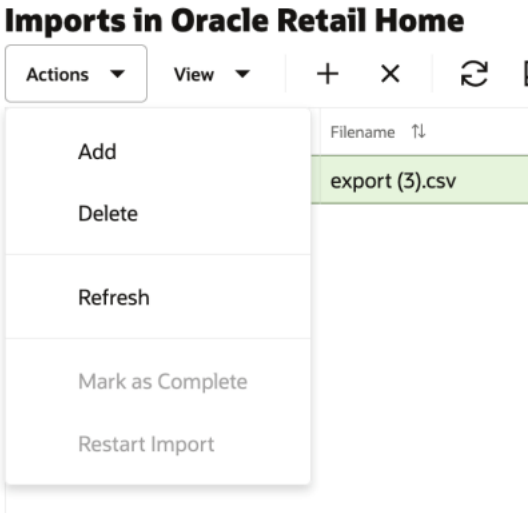
Figure 12-7 Imports Management Actions



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

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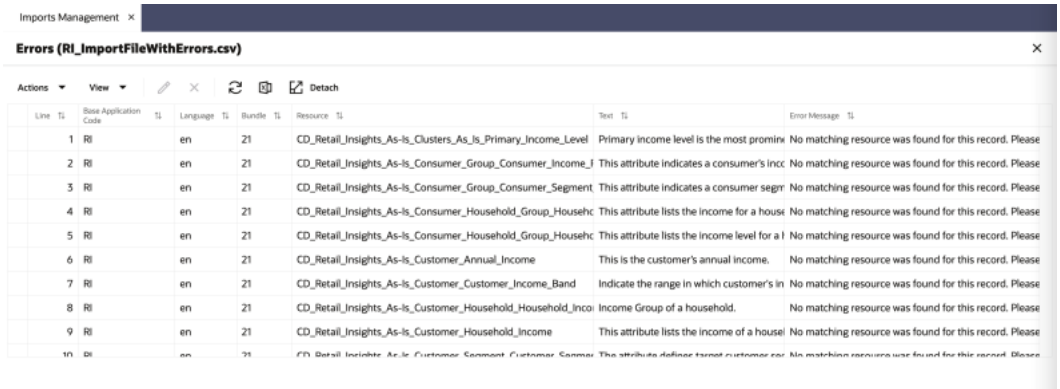
customizations with errors. This takes the user to a modal page within Imports Management. See the section below titled View Errors for more details.

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



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.

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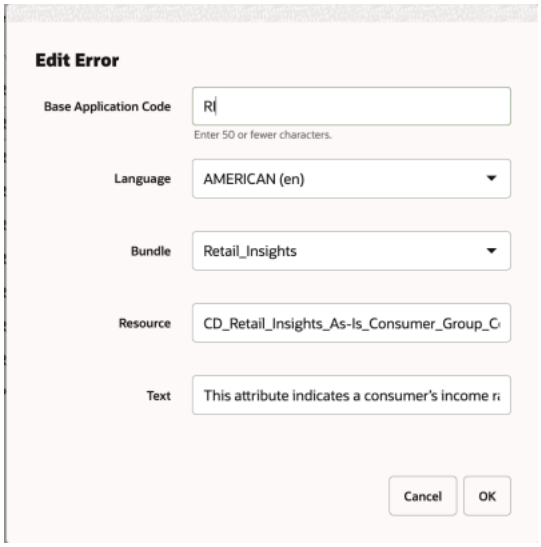
Figure 12-9 Edit Error Dialog



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.

Custom Role Labels

Retail Home provides the option to configure custom labels for user roles. These labels are language-specific and will be displayed in place of the internal role name on the dashboard, and alongside the internal name on the role request screen.

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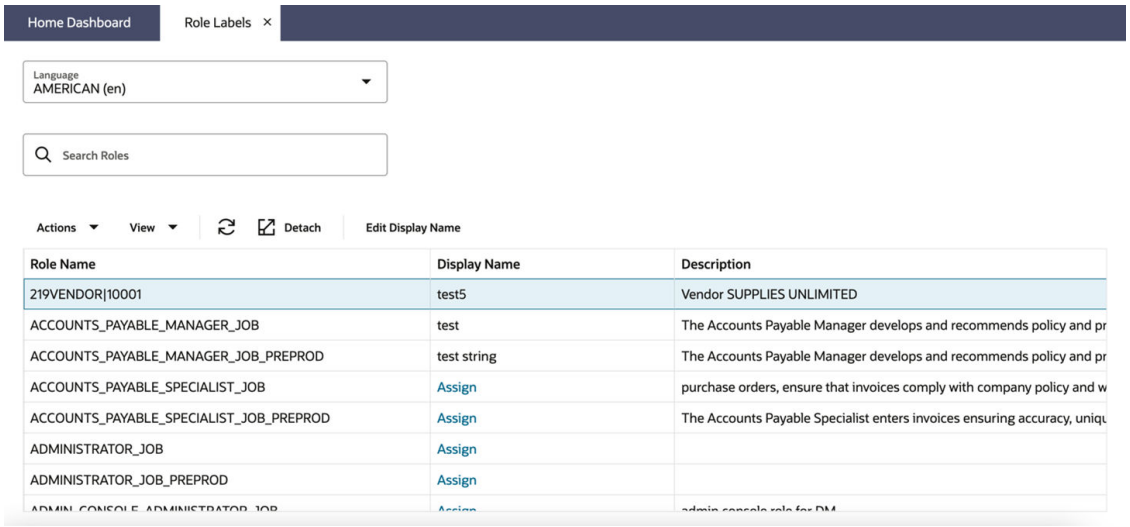
Role Label Configuration

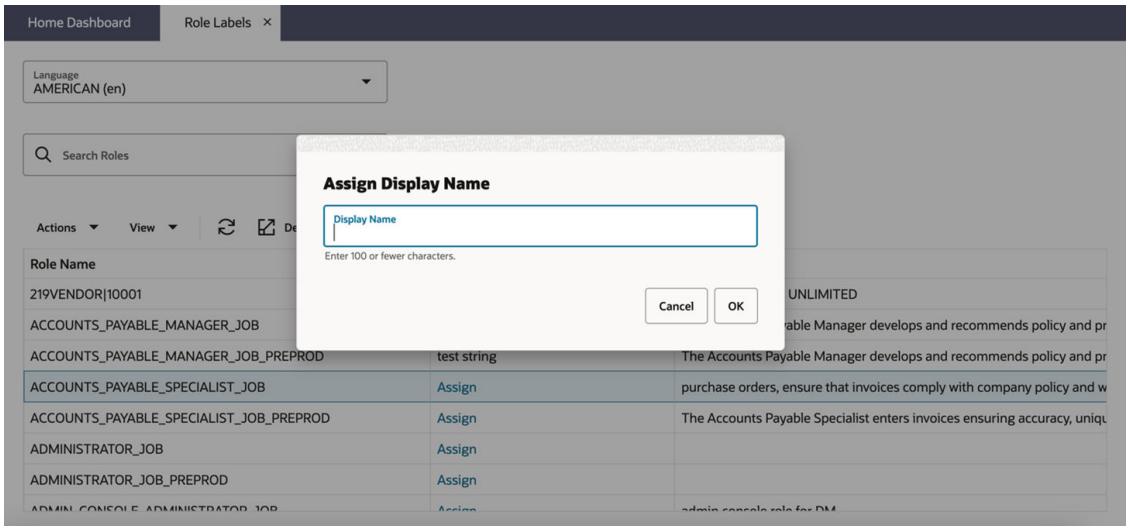
The Role Labels configuration screen can be accessed from the **Retail Home Settings** menu, under the **Resource Bundles** submenu.



Role labels are grouped by language. The table will show all roles available in IDCS or OCI IAM, and can be filtered by role name or label using the search box.

Assigning Role Labels

To assign a label to a role, select it in the table and either click the **Assign** link in the display name column, or click the **Edit Display Name** button at the top of the table.



Enter the label to assign to the role name in the dialog and select **OK** to submit it. Changes to role labels will not appear in some pages of Retail Home until after the application is refreshed.

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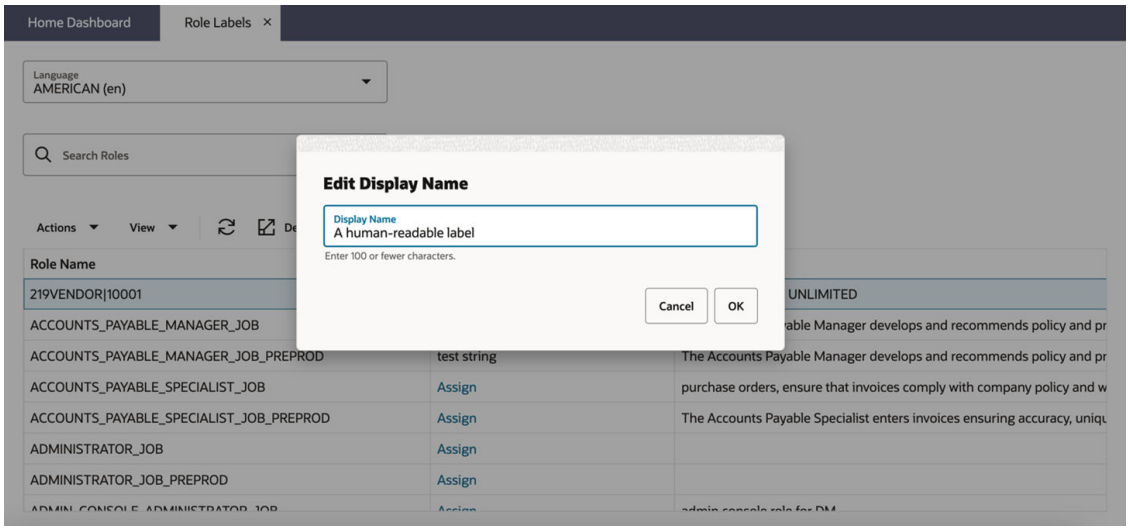
Editing Role Labels

To edit an existing role label, select the row in the table and click the **Edit Display Name** button.



Update the label in the dialog and click **OK** to save.

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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
applications	Array	Array of Application objects to be configured
tiles	Array	Array of Tile objects to be configured
dashboards	Array	Array of Dashboard objects to be configured
properties	Array	Array of Property objects to be configured
reports	Array	Array of Report objects to be configured
filters	Array	Array of Filter objects to be configured

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Applications

Application entries represent applications registered with Retail Home.

Property (*=required)	Type	Description
***name**	String	Name of the application to display in Retail Home. Must be unique.
applicationCode	String	Unique identifier for Retail applications. If the application does not exist it will be created.
applicationType	String	"JRAF" or "ARAF". Indicates which type of application this is when inserting a new application code. Defaults to "JRAF".
***colorSetId**	String	Color set to use for the application in Retail Home. See below for supported values.
***active**	Boolean	Whether the application is active. Inactive applications are not displayed in Retail Home.
applicationLink	String	The base URL to the application.
platformService	String	The base platform REST service endpoint for the application.
roles	Array	Array of Role objects the application is available to. Each role object has a single property containing the role name: `validRole`. 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
***tileName**	String	The name of the tile to display in Retail Home. Must be unique.
***tileColor**	String	The color to use for the tile. See below for supported colors.
url	String	The URL to launch when the tile header is clicked. Supports the <app.url> token when associated with an application, which indicates the tile will open relative to the application's `applicationLink` value.
applicationName	String	The name of the application this tile is associated with. Must be one of the applications defined in the seed data.
translations	Array	Array of translations linked to the tile. May be empty.

Tile Translations

Translations linked to a corresponding Tile.

Property (*=required)	Type	Description
***tileName**	String	The name of the tile as defined in the Tile object with which this translation is associated.
***sourceLanguage**	String	Original language linked to the Tile.

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Property (*=required)	Type	Description
***language**	String	Language to which the translation needs to be applied.

Dashboards

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

Property (*=required)	Type	Description
***jobRoleName**	String	The job role the dashboard is for. Only one dashboard can be created per role.
***active**	Boolean	Whether the dashboard is active. Inactive dashboards are not displayed in Retail Home.
defaultDashboard	Boolean	Whether the dashboard is the default. Default dashboards will be preferentially displayed when opening Retail Home.
***tiles**	Array	Array of Dashboard Tile objects on the dashboard. May be empty.
***regions**	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
tileSize	String	How much space to allocate to the tile. Supported values are "1x1" and "2x2".
***active**	Boolean	Whether the tile is active. Inactive tiles will not be displayed in Retail Home
***tileName**	String	The name of the tile being displayed. The name must be from the array of Tile objects in the seed data.
***tileStates**	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
***tileStateConfigId**	String	ID of the tile state report to display
reportName	String	Name of custom report to display. Mutually exclusive with `tileStateConfigId`.
expandedReportConfigId	String	ID of the expanded report to display
***active**	Boolean	Whether the tile state is active. Inactive tile states will not be displayed in Retail Home

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Property (*=required)	Type	Description
***urlConfigurations**	Array	Array of URL configurations configured as data sources for the tile state. No more than one active configuration per report type is allowed.
contentFilters	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
***filterName**	String	The name of the filter to apply. This must correspond to a filter provided in the current seed data.
required	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
***active**	Boolean	Whether the region is active. Inactive regions will not be displayed in Retail Home
***reportConfigId**	String	ID of the report to display in this region
***regionId**	String	Which region this configures. Valid options are "Primary", "Secondary", and "Banner". No more than one configuration per region is allowed on a dashboard
***urlConfig**	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
***contentType**	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)
***resourceId**	String	ID of the service this URL configures.
***resourceType**	String	What type of URL this is. Valid options are "REST", "FILE", and "LINK"

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Property (*=required)	Type	Description
***url**	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.
***active**	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.

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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.
***filterType**	String	Type of the Filter. Value options are 'MULTISLCT', 'TOGGLECTRL', 'NUMINPUT', 'CHECKBOX' & 'RADIOBTN'.
***active**	Boolean	Determines whether this filter is active.
***urlConfig**	Object	The URL configuration set for this filter.
options	Array	An array of filter options
translations	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
***applicationName**	String	Name of the application this translation is associated with. Must be one of the applications defined in the seed data.
***paramName**	String	Parameter name this translation is associated with. The `paramName` must be defined in the `filters` block.
***filterName**	String	Filter name this translation is associated with. The `filterName` must be defined in the `filters` block.
options	Array	An array of translated options
***language**	String	Language to which the translation needs to be applied.
***sourceLanguage**	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
***optionName**	String	Name of the option to display in the UI
***optionValue**	String	Value of the option to use when sending data
***displayOrder**	Number	Order to display the option in the UI
***language**	String	Language to which the translation needs to be applied. Not required for options on the parent Filter object.
***sourceLanguage**	String	Original language of the base option. Not required for options on the parent Filter object.

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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)

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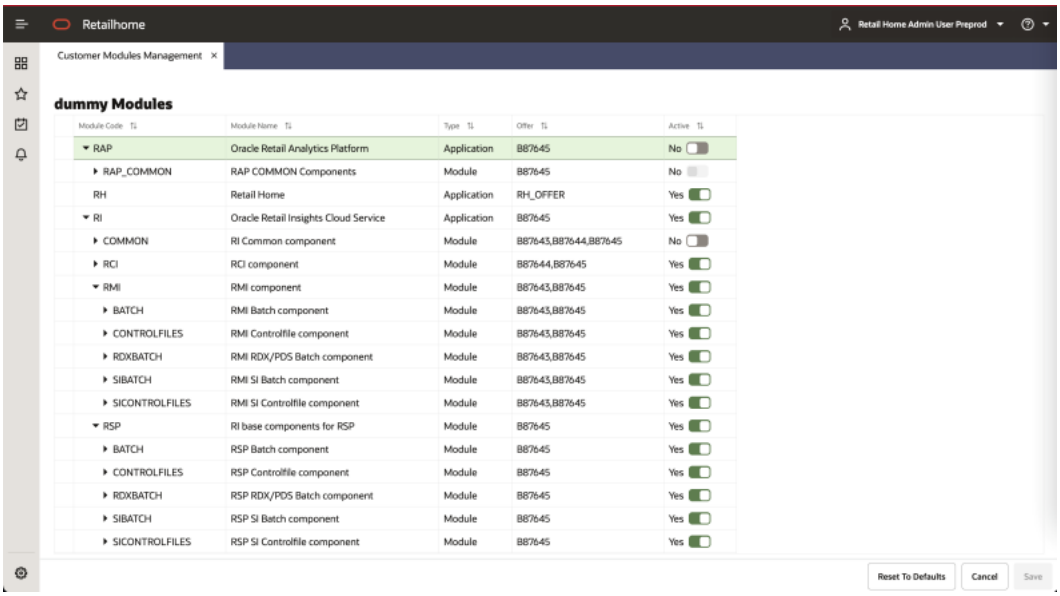
14
Customer Module Management

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



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.

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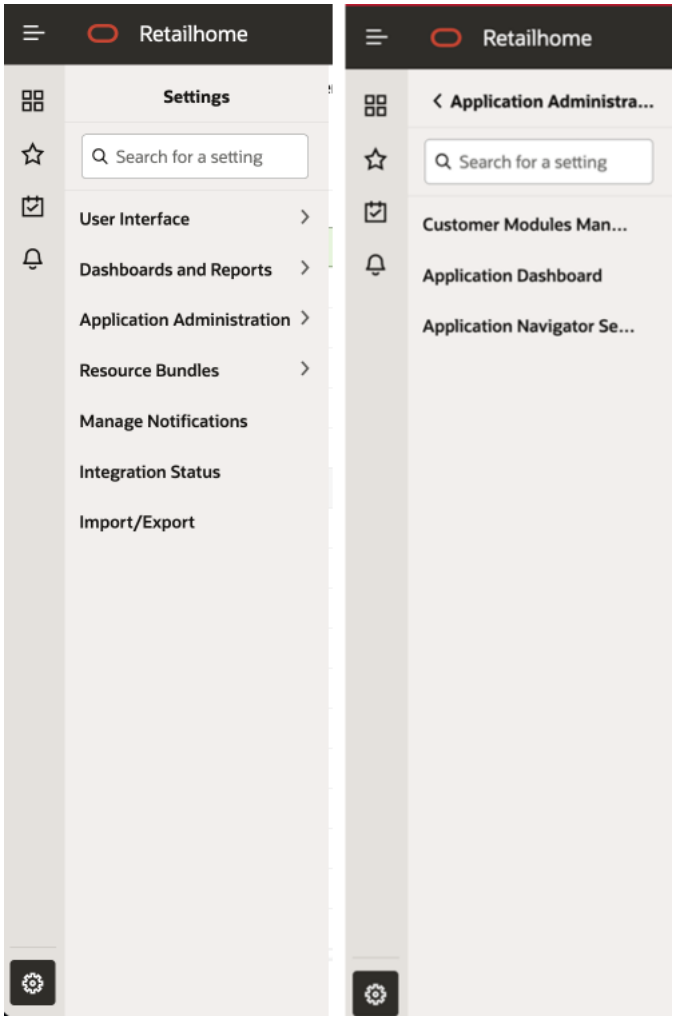
Figure 14-2 Customer Modules Management Link within Retail Home's Settings Menu



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

Only modules provisioned to the customer are displayed.

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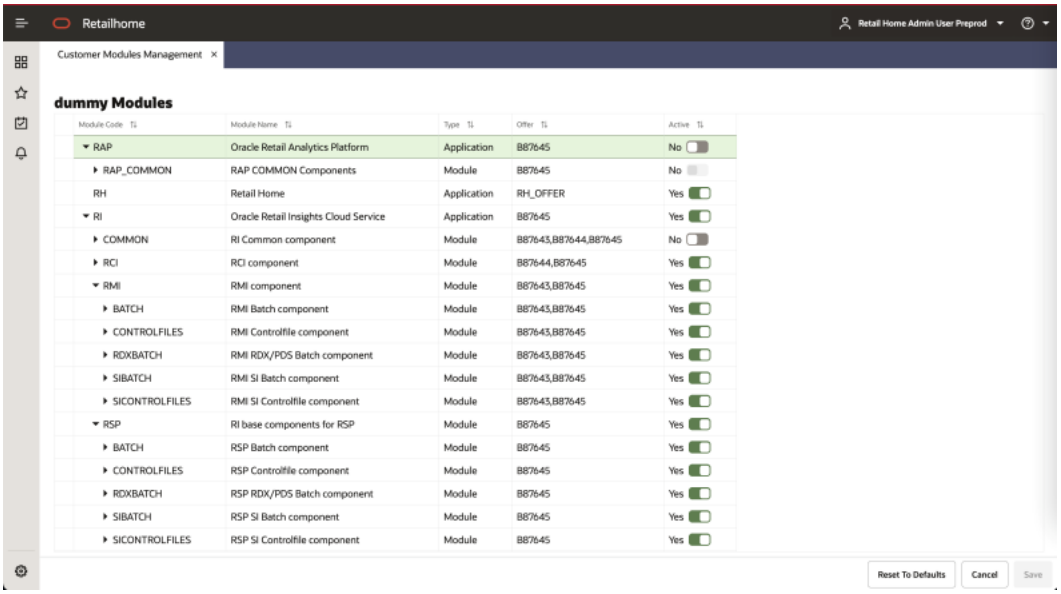
Figure 14-3 Retail Home Customer Modules Management Page



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

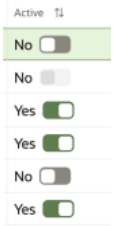
The columns include:

- **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.

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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.

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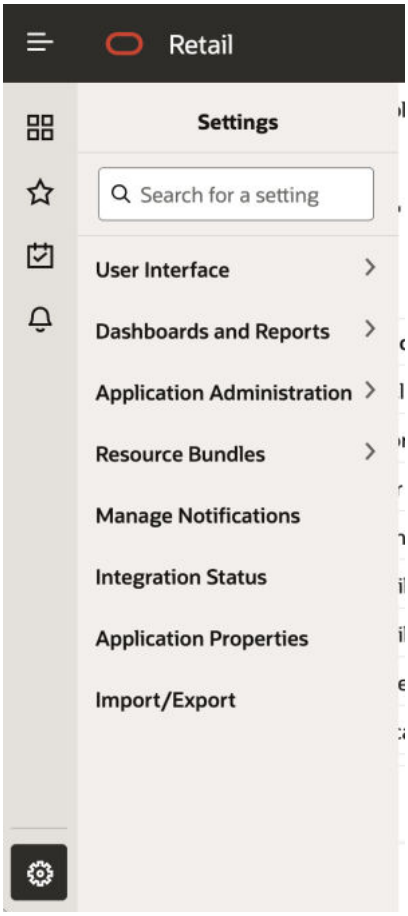
15

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.

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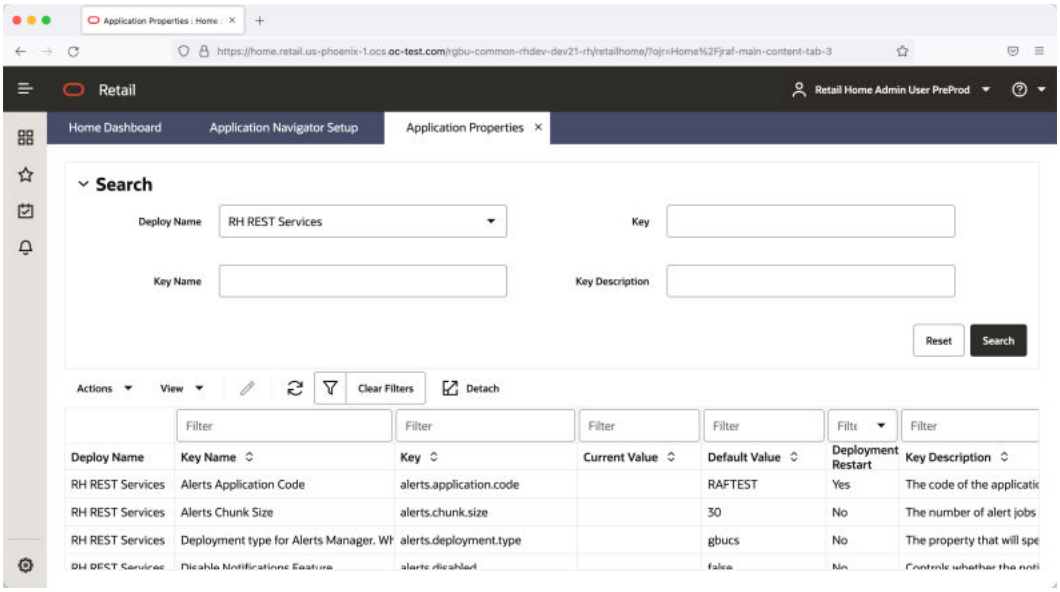
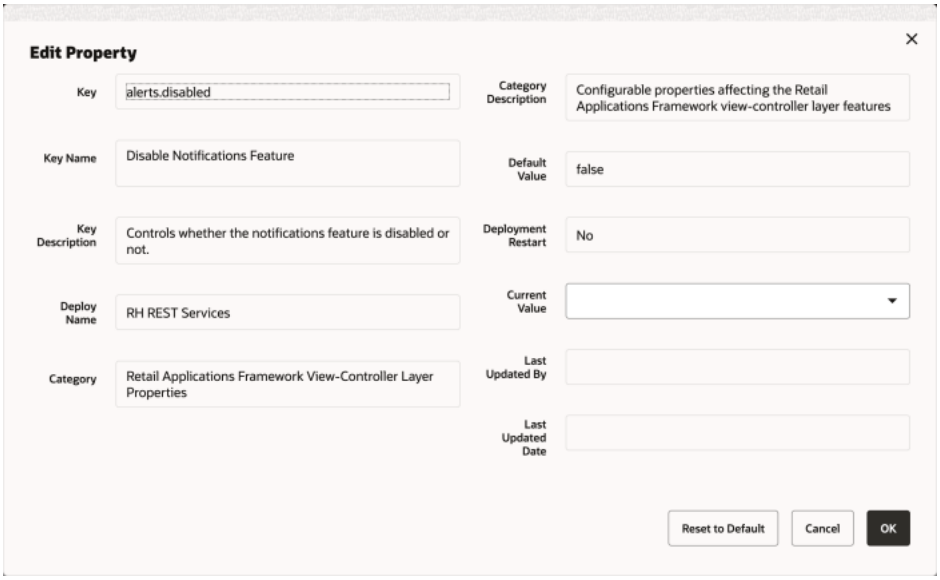


Modifying Properties for an Application

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.

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

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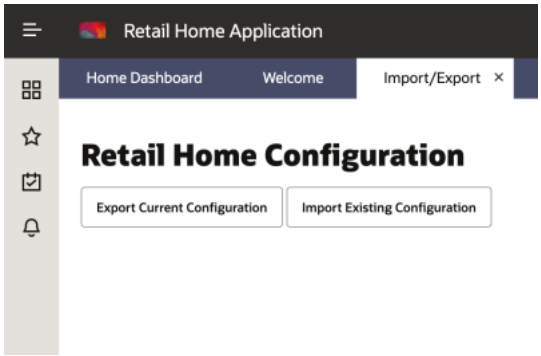
16
Import / Export Configuration

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.

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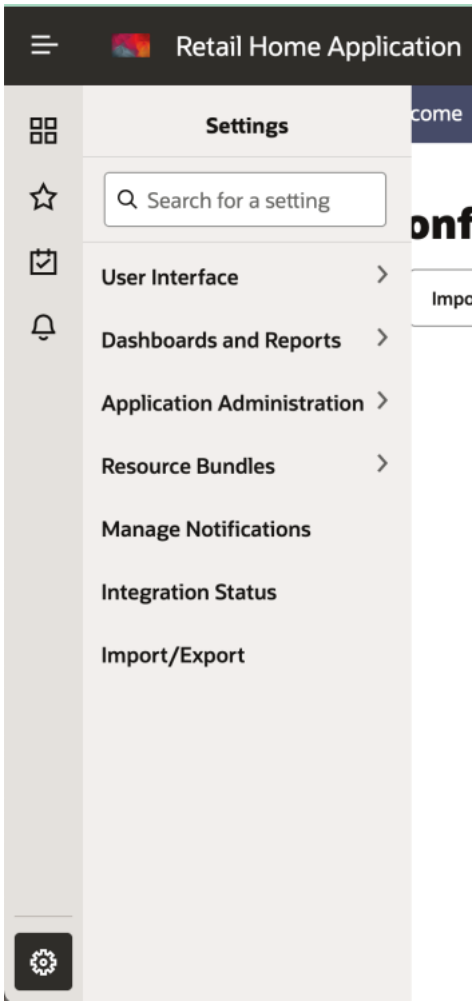
Figure 16-2 'Import/Export' Option in Settings Menu



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.

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Figure 16-3 Export Current Configuration Pop-up Window

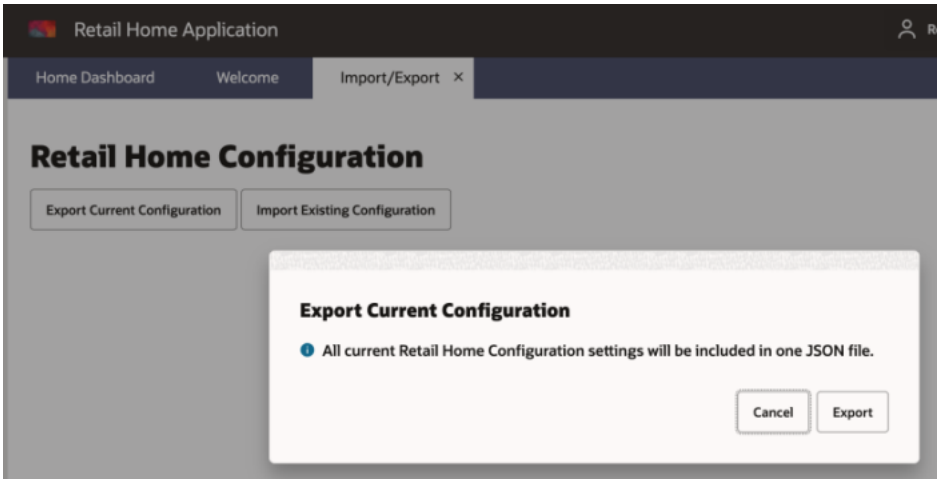
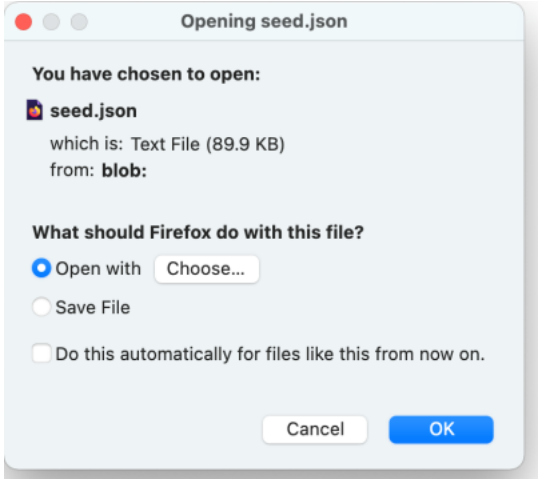


Figure 16-4 Open or Save Exported Configuration JSON File



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.

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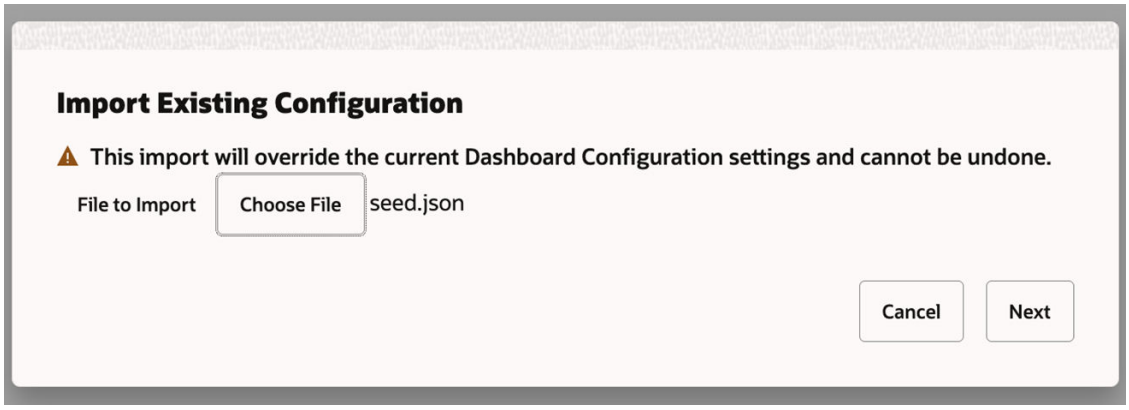
Figure 16-5 Import Existing Configuration Popup Window



Before submitting the import, the administrator has the option to review and update recognized and unrecognized configuration URLs. They can also remove the `_PREPROD` suffix from relevant entries as needed.

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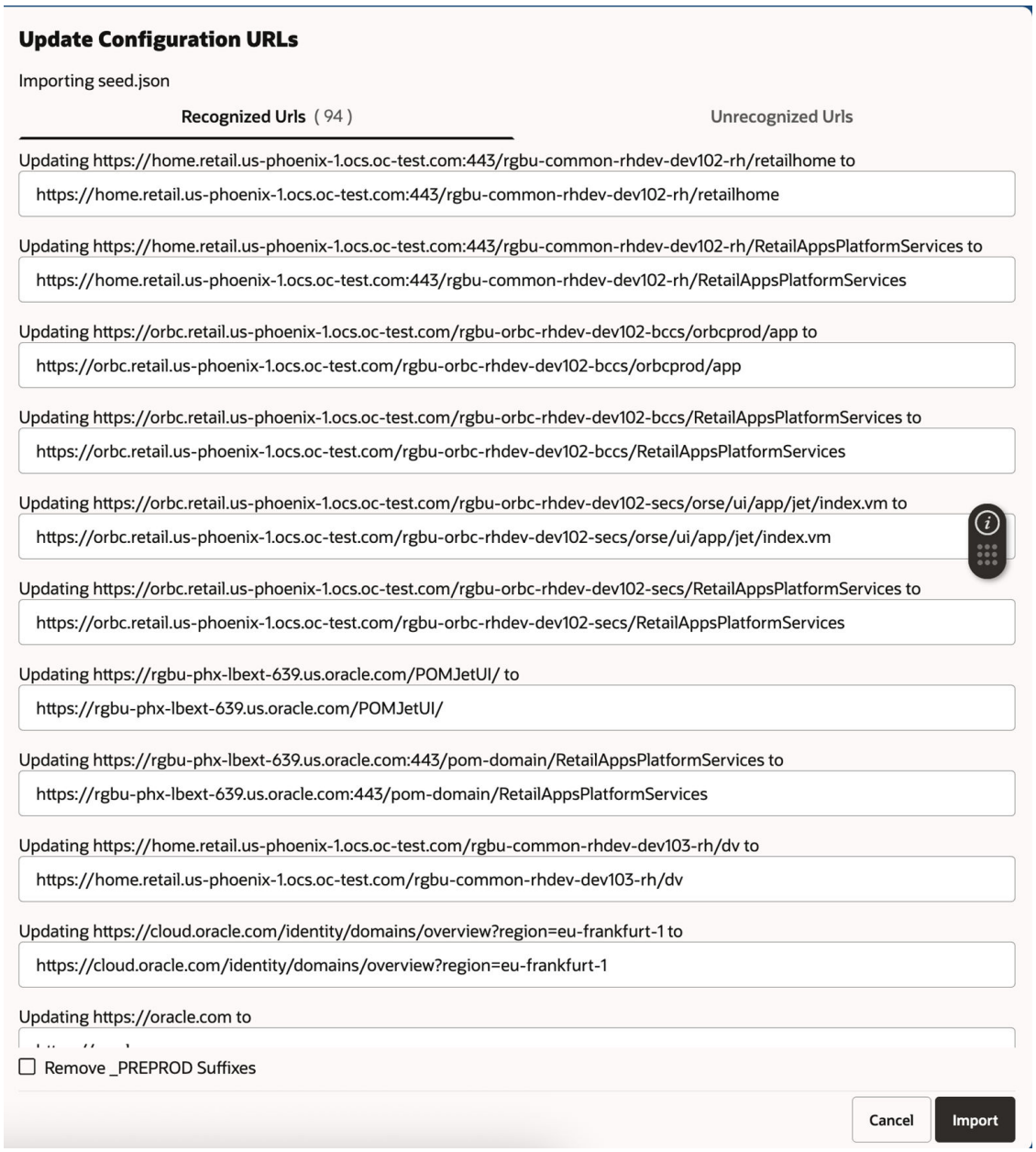

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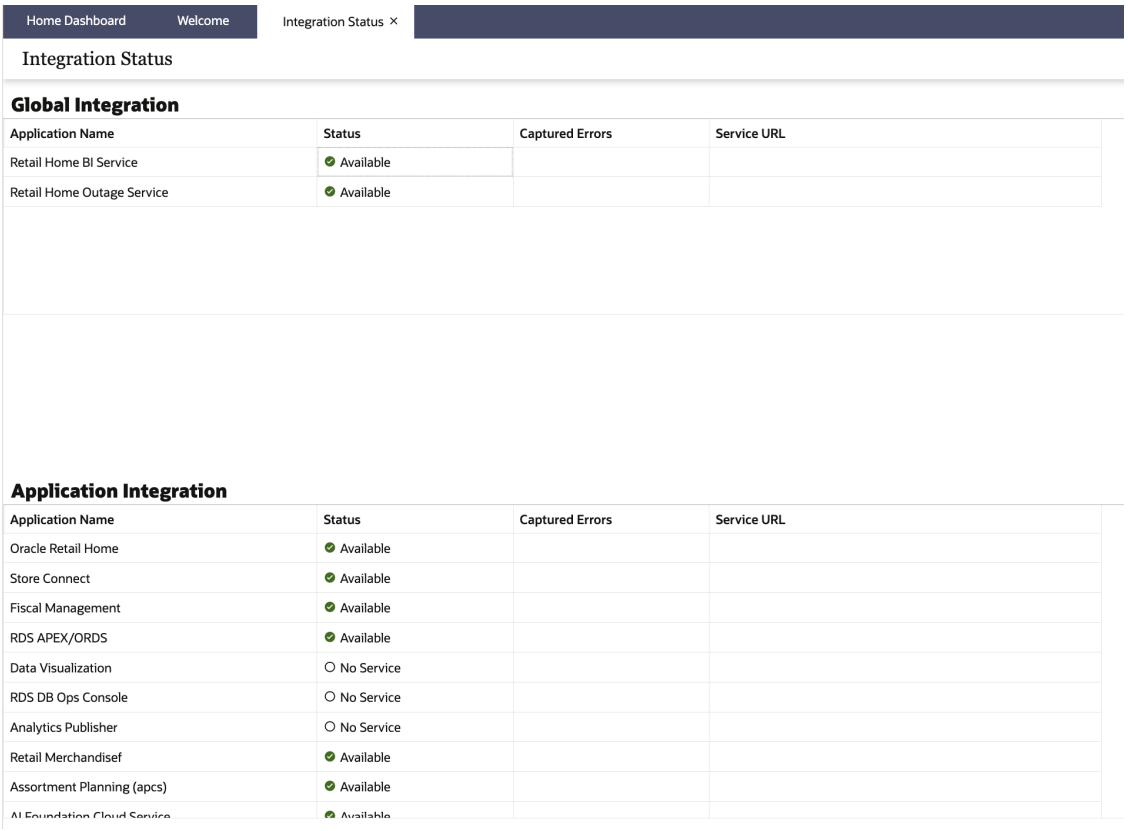
17

Integration Status

The Integration Status screen provides an overview of the Retail Home application's integration with various global and application-level services. It allows users to monitor the status and connectivity of these integrations, identifying which integrations are functioning properly and which are not, along with capturing error messages for any non-functional integrations. As new integration points are introduced, they are automatically reflected on this page.



Launching Integration Status

The Integration Status page can be launched from the Retail Home Settings Menu.

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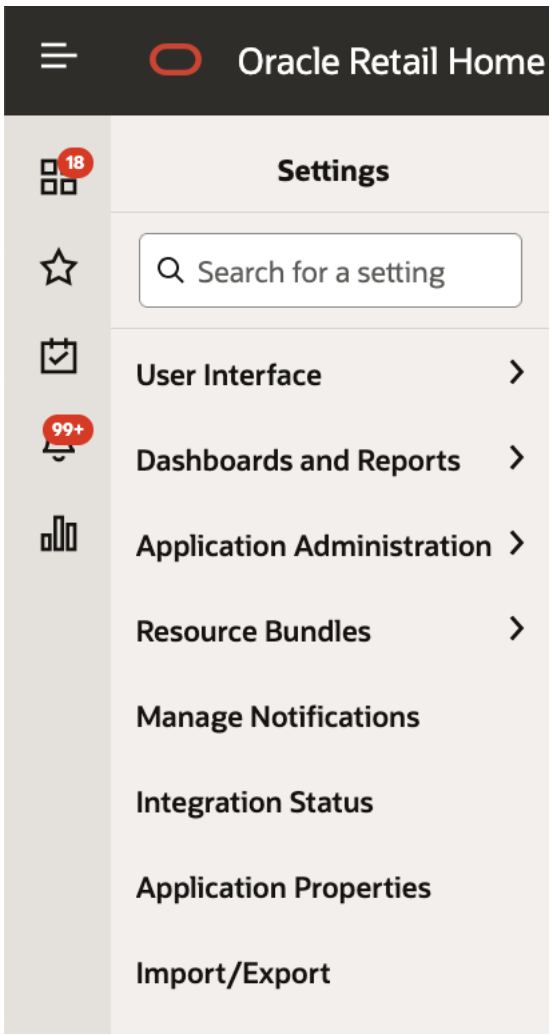

Global Integration Section

This section displays the status of core global services essential for the functioning of Oracle Retail Home. For example, “Retail Home BI Service” indicates the availability of business intelligence services, “Retail Home Outage Service” indicates whether outage management services are functioning correctly etc.

Key fields in this section include:

- **Status:** Displays the current status of the service (for example, Available).
- **Captured Errors:** Highlights any errors if integration fails.
- **Service URL:** The endpoint URL for the respective service.

> **Note**
>
> If the user is not subscribed to AIF, the "Retail Home BI Service" item will display "Unavailable" status.

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Application Integration Section

The application integration section is for any application that has been added to the Application Navigator with a PSRAF URL; for example, RDS APEX/ORDS, Assortment Planning (APCS), and so on.

Key fields in this section include:

- **Status:** Indicates the service's operational state (for example, Available, No Service)
- **Captured Errors:** Displays detected errors if integration fails.
- **Service URL:** Displays the health check URL for Platform Services for the application.

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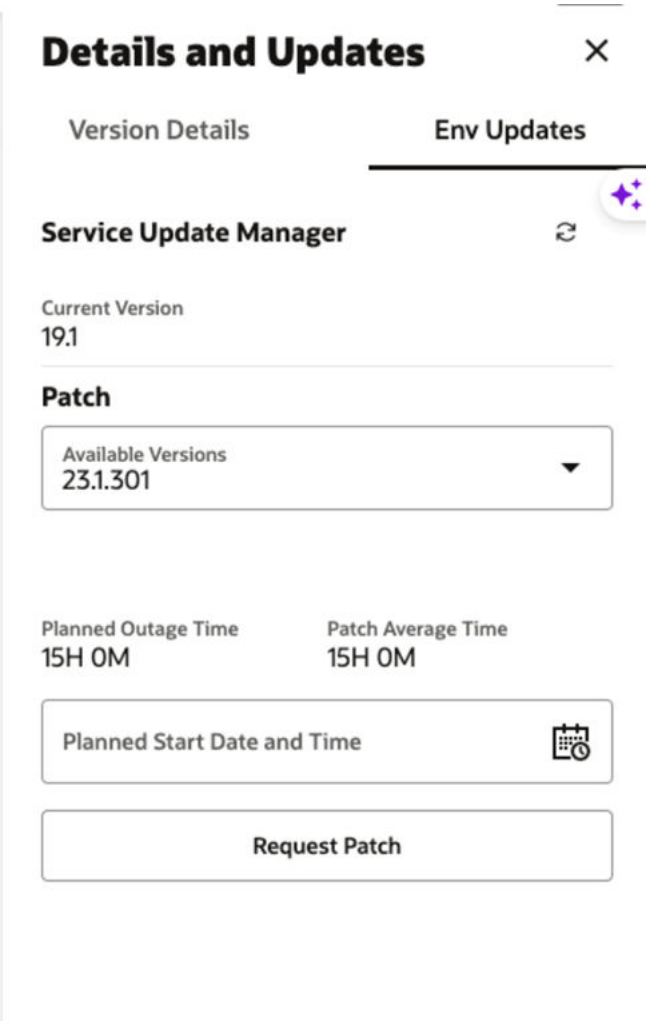
18
Env Updates

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 18-1 Env Updates Tab



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Patch Request

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

Below are the patch request flows:

- **Request Patch -> Request Accepted -> Request Approved -> Patch Scheduled**
- **Request Patch -> Request Accepted -> Patch Rejected**

The administrator also can also create a new patch request while the previous one is in “Scheduled and Approved” status.

- **Request Patch -> Request Accepted -> Request Approved -> Patch Scheduled -> Reschedule Patch -> Reschedule Request Accepted -> Reschedule Request Approved -> Patch Scheduled**
- **Request Patch -> Request Accepted -> Request Approved -> Patch Scheduled**
- **Request Patch -> Request Accepted -> Request Approved -> Patch Scheduled -> Reschedule Patch -> Reschedule Request Rejected -> (Initial) Patch Scheduled**
- **Request Patch -> Request Accepted -> Request Approved -> Reschedule Patch -> Reschedule Request Accepted -> Reschedule Request Approved -> Patch Scheduled**

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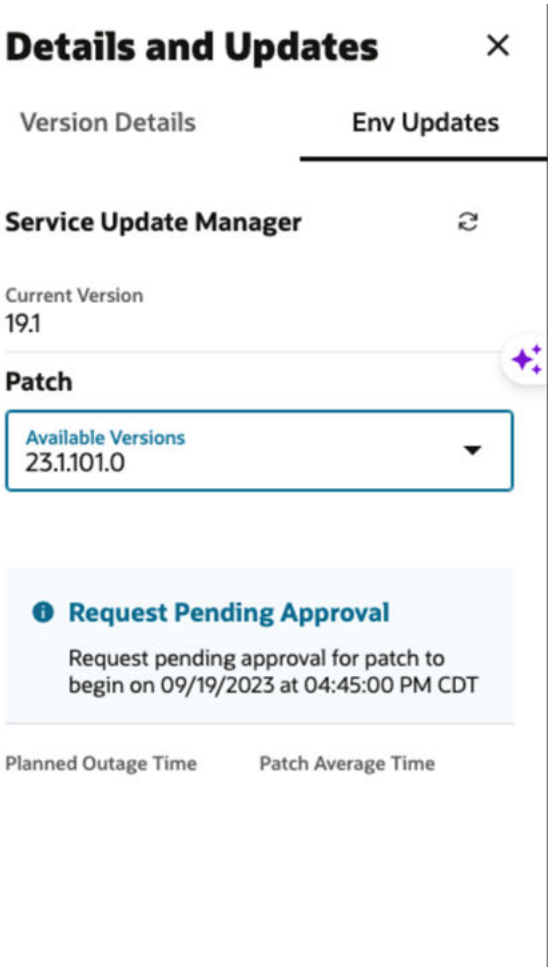
Figure 18-2 Status Display After Requesting a Patch



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.

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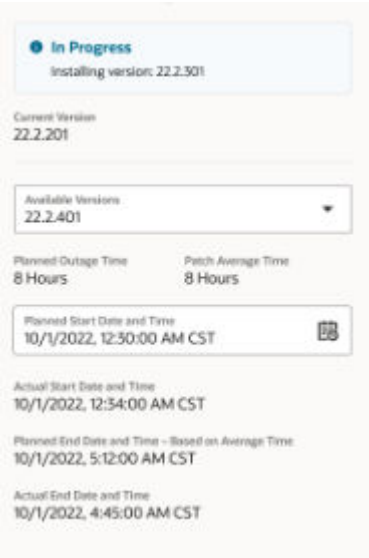
Figure 18-3 In Progress Patch with Status Bar



The **Request Patch** button is 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

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Figure 18-4 Completed Patch Run with Error Display

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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
PC	Percent	Formats 0.045 as 4.5%
S	Short Number	Formats 9950000 as 9.95M
N	Number	Formats 1234567.89 as 1,234,567.89
(empty)	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
up	An upward pointing arrow
down	A downward pointing arrow

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Table A-2 (Cont.) Indicator

Indicator Value	Meaning
normal	A normal severity indicator.
info	An info severity indicator
important	An important severity indicator
critical	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: • PC - Percent (.01 = 1%) • S - Short (1000 = 1K) • N - Number (1000 = 1,000)
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
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.

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Property	Type	Required	Description
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.
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: • PC - Percent (.01 = 1%) • S - Short (1000 = 1K) • N - Number (1000 = 1,000)

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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 Table Metric Config 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 Table Headers Config)
metrics	Array	Y	Array containing one to three Numeric values for this item. (Should match the number of metrics defined in the Table Headers Config)

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

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- 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 Metric Item 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 Metric Item objects to display on the tile. Up to six metric items may be returned; some reports will display fewer.
chart	Object	N	A Metric Chart object defining a chart to be displayed below the metrics.

Example response payload for Four Metric Summary:

```
{
  "items": [{
      "name": "Metric 1",
```


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```
      "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
    }
  ],
```


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```
  "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
  }
}
```


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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 Table Headers Config object defining the structure of the report.
items	Array	Y	An array of Table Item 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"],
```


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```
      "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 Metric Item 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"
        },
        {
```


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```
            "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.

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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: • PC - Percent (.01 = 1%) • S - Short (1000 = 1K) • N - Number (1000 = 1,000)
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.
1	Metric Value	Number	Y	Value of the metric.
2	Value Format	String	N	Format for the value. The following formats are supported: • PC - Percent (.01 = 1%) • S - Short (1000 = 1K) • N - Number (1000 = 1,000)
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".

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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.
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.

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Column	Property	Type	Required	Description
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.
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

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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

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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.

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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>
```


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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
disUrl	String	Y	Host URL for BI Publisher
name	String	Y	Name for the PAR
dateExpires	String	Y	Expiration date for the PAR. Must be in the future. Uses the format `YYYY-MM-DD`
objectName	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"
}
```


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The `disUrl` field can be taken from the BI Publisher URL. For example, **https://rgbu.gbua.ocs.oc-test.com**/fn9tojyo1js4rhhzwqx0/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_q8qolpw40tamqx8npfp6_RGBU_DEV56_1/o/home/1000/
example.pdf"
}
```


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C

Appendix: Managing User Information Through the Data Privacy Services

Retail Home deploys the Platform Data Privacy Services to manage user information recorded during operations. These services are available in the retail home environment under `<namespace>/RetailAppsDataPrivServices`.

Example

Retail Home deploys the Data Privacy Services to `https://home.retail.us-ashburn-1.ocs.oraclecloud.com/rgbu-common-rhdev-dev99-rh/RetailAppsDataPrivServices`

Authenticating with the Data Privacy Services

Calling the Data Privacy Services requires the role `DATAPRIV_ADMINISTRATOR_REST_API_ROLE`. Users with this role should generate an OAuth token and attach it in the Authorization header of requests.

Alternatively, the services can be authenticated against using the scope `rgbu:rh:datapriv-RH-<environment>`, where `environment` is the environment type and index (for example, `rgbu:rh:datapriv-RH-STG1`). An OAuth token generated for this scope can also be used in the Authorization header.

Getting User Information

To check whether information has been stored for a specific user, make a GET request to `/RetailAppsDataPrivServices/rest/privatedata/user?customer_id=<username>`, filling in the username for the `customer_id` parameter.

The call should have the following headers:

- `Authorization: Bearer <OAuth token>`
- `Accept: application/json`

The response will have the following form (if there are no records for the user, the sections will be empty):

```
{
  "User Information": {
    "list": [
      [
        {
          "USER_ID": "retail.user"
        }
      ],
      [
        {
          "USER_ID": "retail.user"
```


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```
            }
          ]
        ]
      }
    }
```

Deleting User Information

To replace all instances of a user's name in the database with a dummy value, make a `DELETE` request to `/RetailAppsDataPrivServices/rest/privatedata/user?customer_id=<username>::<dummy>`, filling in the username for the `customer_id` parameter. The `dummy` string can be replaced with any other arbitrary string, which will replace the username in the database.

The call should have the following headers:

- `Authorization: Bearer <OAuth token>`

A successful request returns an empty HTTP 200 response.

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