Oracle® Retail Import Management

Do the Basics User Guide

Release 19.3.000

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Oracle Retail Import Management Do the Basics User Guide, Release 19.3.000

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Preface

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

Audience

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

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

1
Trade Management Overview

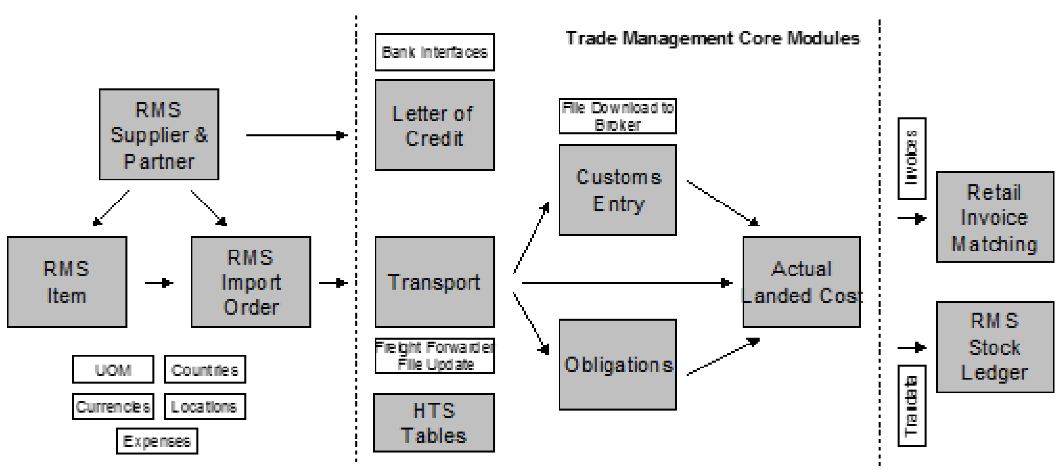
The Oracle Retail Trade Management application allows retailers to perform the following Trade Management tasks.

- Build an accurate estimated landed cost.
- Opens purchase orders at the point of origin.
- Automatically issue a Letter of Credit application and amendment requests.
- Classify merchandise for clearance through customs.
- Track merchandise from landing to receipt.
- Generate an actual landed cost and cost variance analysis.

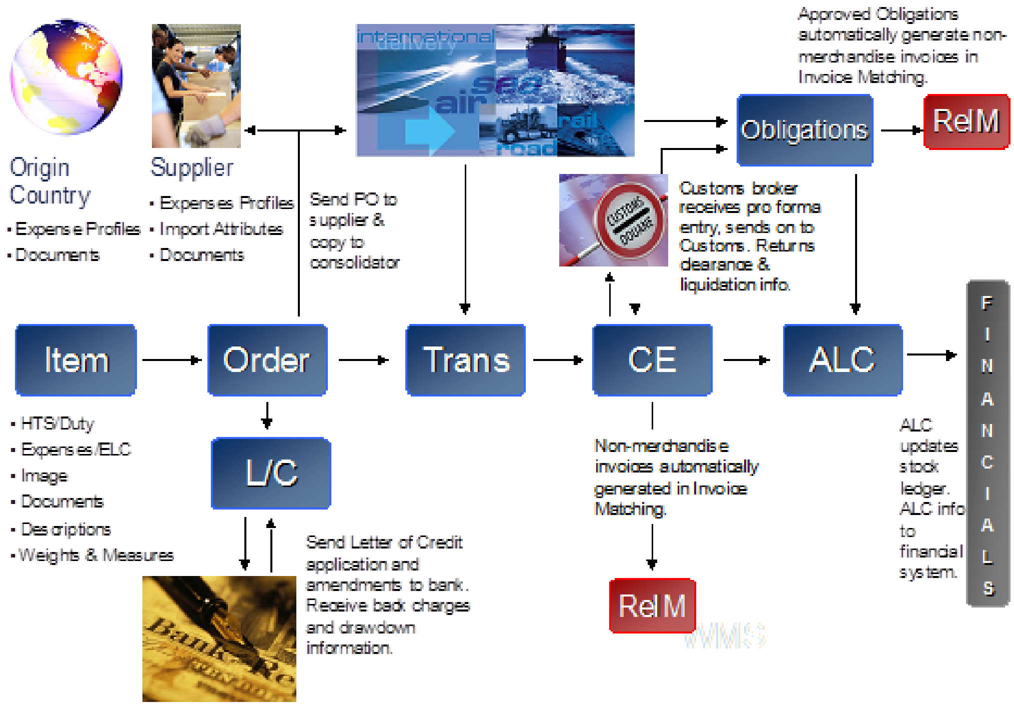
Retail Trade Management Product/Solution Summary

The Retail Trade Management Product/Solution:

- Builds an accurate estimated landed cost
- Opens purchase orders at the point of origin
- Automatically issues a Letter of Credit application and amendment requests
- Classifies merchandise for clearance through Customs
- Tracks merchandise from lading to receipt
- Generates an actual landed cost and cost variance analysis



Retail Trade Management Solution



2
Do the Basics

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

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

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

The following topics are covered in this chapter:

- Log on to the Application
- User Help
- Task Bar Options
- Set User Preferences
- Table Level
- Search Screens
- View all the Sections Within a Window
- Log Out of the Application

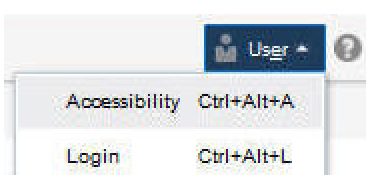
Log In and Out

Log on to the Application

To log on to the application:

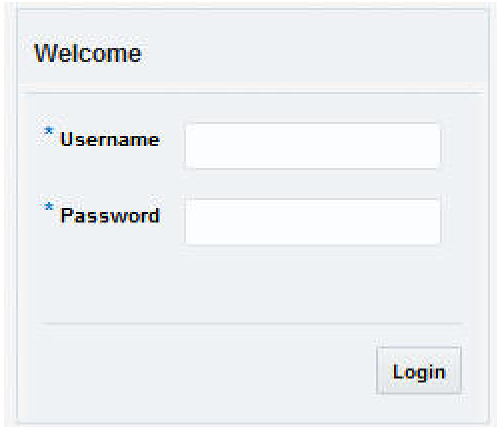
1. Click the **User** list which is to the top right of the Oracle Merchandising window.

Figure 2-1 User List Screen



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

Figure 2-2 Welcome Screen

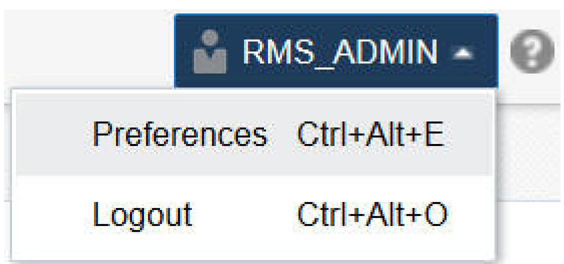


3. Provide the following login information:
   a. Enter your user name in the **Username** field.
   b. Enter your password in the **Password** field.
4. Click **Login**.

Log Out of the Application

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

Figure 2-3 Logging Out of the Application



User Help

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

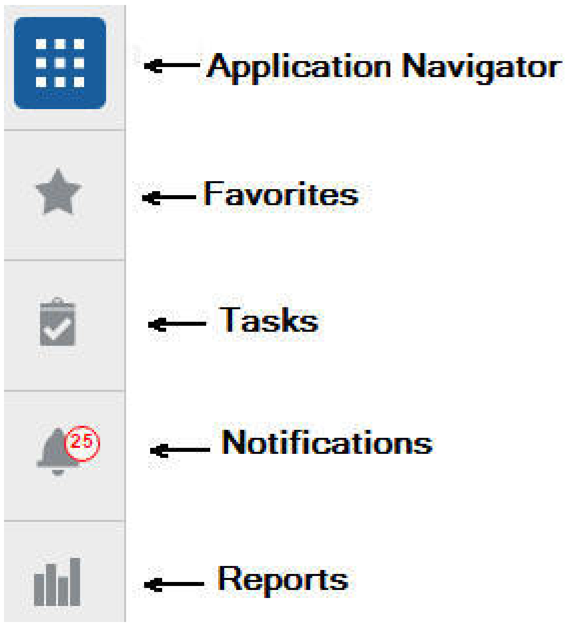
You can access online help for a particular page by clicking on the Help link at the top of the application home page or by clicking the Help icon on every page of the application. Once in the help, you can access additional information through the table of contents or by using the index.

Common Actions and Icons

Task Bar Options

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

Figure 2-4 Navigation Bar



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

- Application Navigator
- Favorites
- Tasks
- Notifications
- Reports

Application Navigator

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

> **Note:**
>
> Your view may vary, depending upon the features selected during the setup process.

To switch between applications:

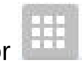
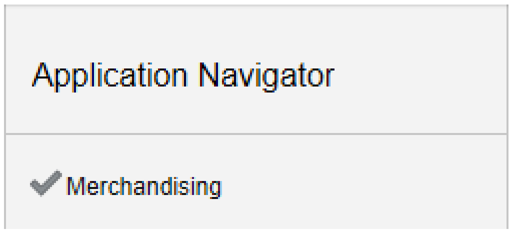
1. At the top left of the application, click the Application Navigator  icon to open the list of available applications.

Figure 2-5 Application Navigator



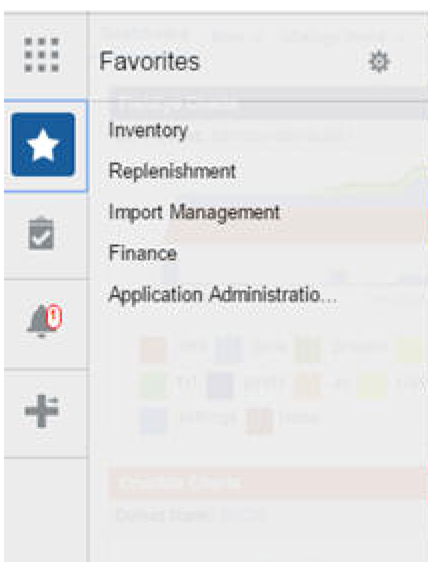
2. Select the listed applications. The application will open in a new tab.

Favorites

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

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

Figure 2-6 Favorites Area



Tasks

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

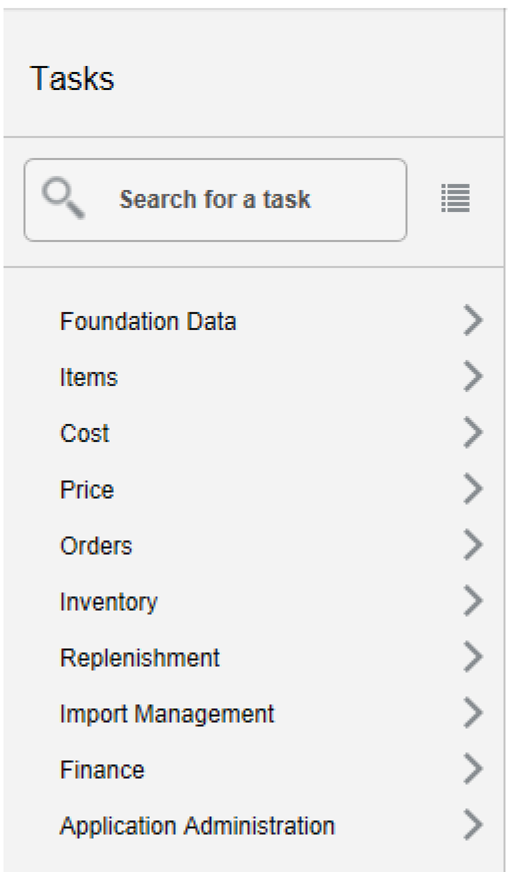
A task is a set of links to a series of task flows organized in a specific sequence to accomplish a business process or procedure. For example, tasks can be defined for common multi-step procedures or processes so that you can quickly step through tasks. By navigating sequentially to the pages outlined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

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

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

> **Note:**
>
> Your task menu may appear slightly different, depending on your retail application.

Figure 2-7 Tasks Menu



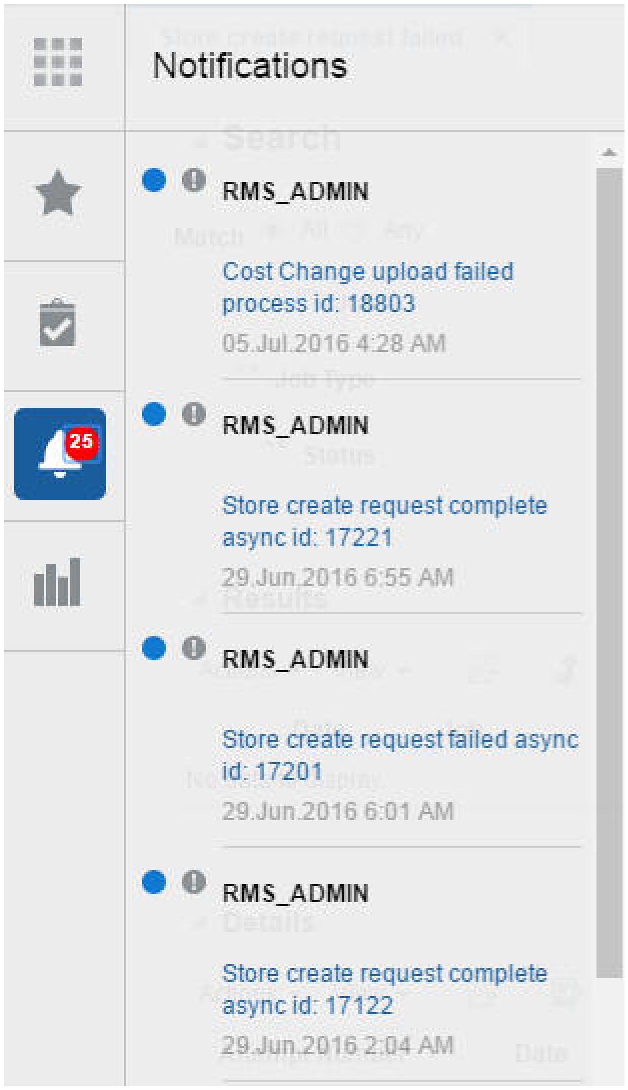
Notifications

Notifications bring events within the application to your attention.

See the following examples:

- A simple, informative message indicating a long-running process has completed
- A message indicating a critical exception has occurred
- The store create request failed

Figure 2-8 Notifications

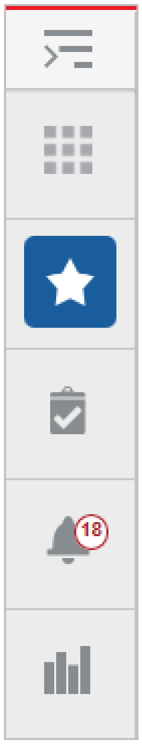


Notification Badge

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

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

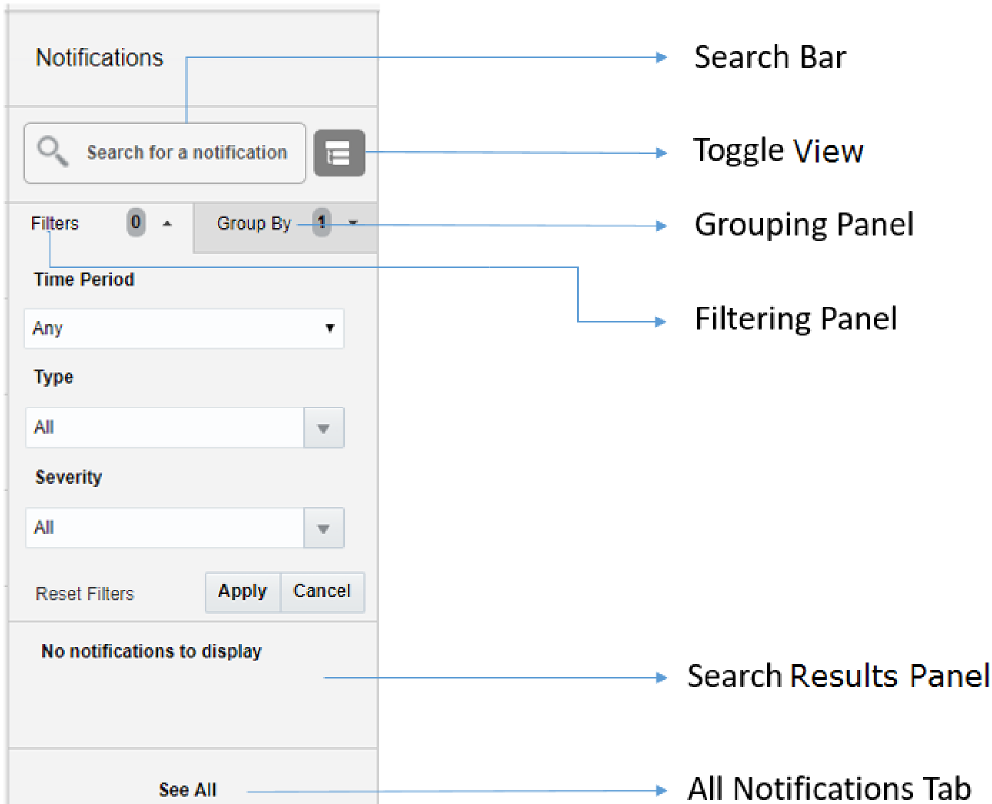
Figure 2-9   Notification Badge



Notification Sidebar

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

Figure 2-10 Notifications Sidebar



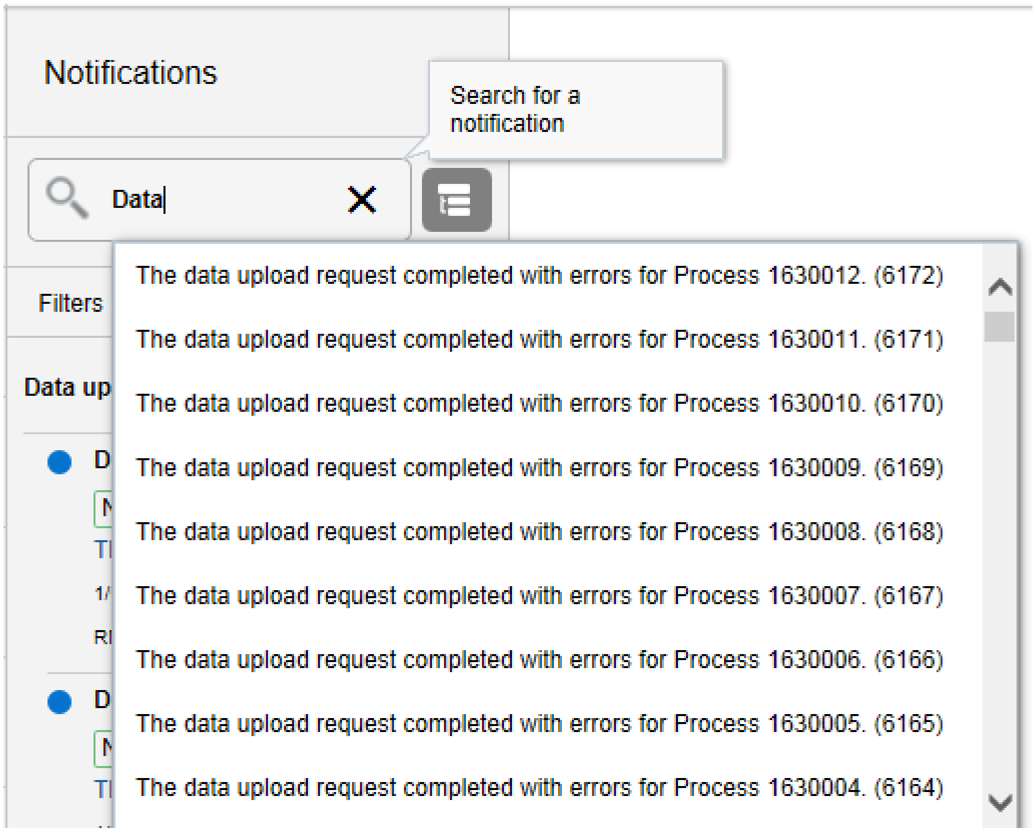
Each component of the Notifications Sidebar is discussed in detail in the following sections:

Search Bar

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

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

Figure 2-11 Search Bar



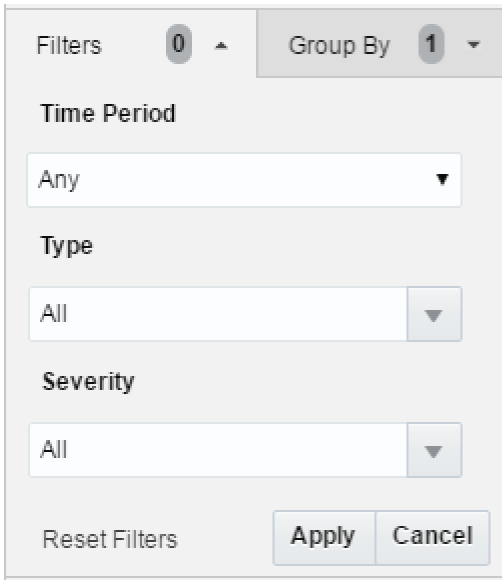
Filtering Panel

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

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

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

Figure 2-12   Filtering Panel

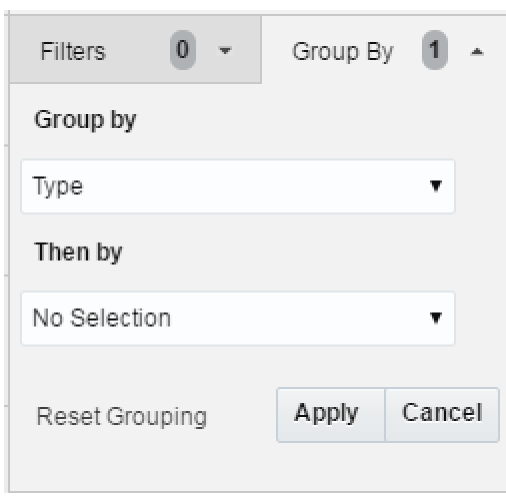


Grouping Panel

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

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

Figure 2-13   Grouping Panel

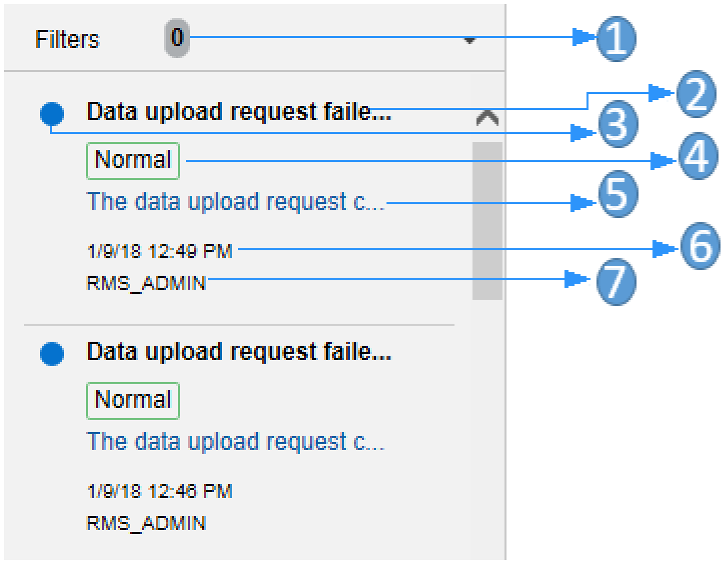


Results Panel - List View

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

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

Figure 2-14 Results Panel - List View



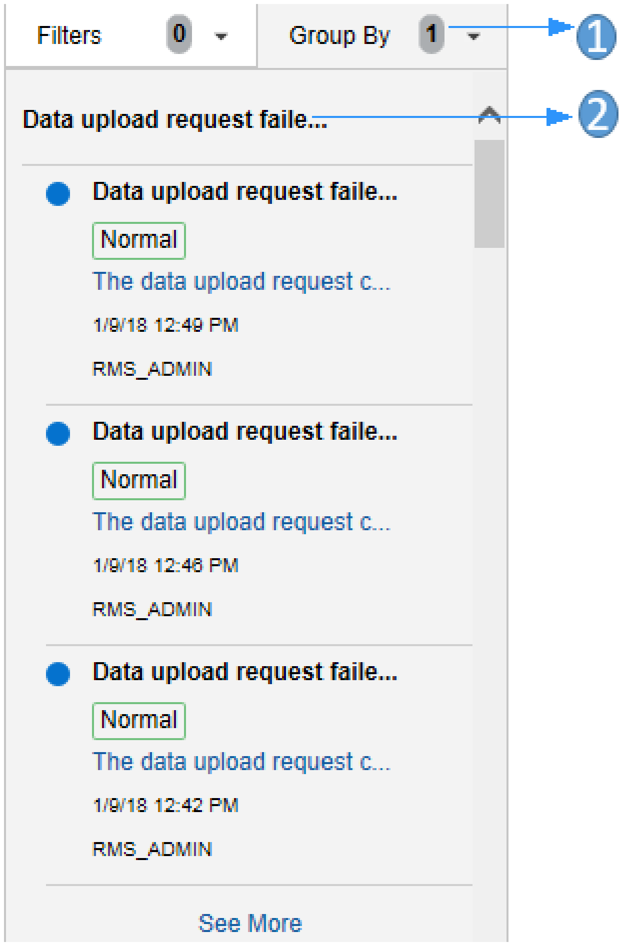
1. Indicates that no filtering was done.
2. Notification Type - A description of the Type is displayed.
3. Read/Unread - A blue icon is shown next to the notification if it is unread.
4. Notification Severity - A colored label indicating the severity of the notification is shown.
5. Description - The description associated with the notification. If the notification was designed to launch into a relevant flow, then this is displayed as a link. Otherwise, the description is rendered as plain text.
6. Creation Time - A timestamp that shows the date and time at which the notification was created.
7. User name - Creator of the notification.

Results Panel - Grouped View

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

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

Figure 2-15 Results Panel - Grouped View



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

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

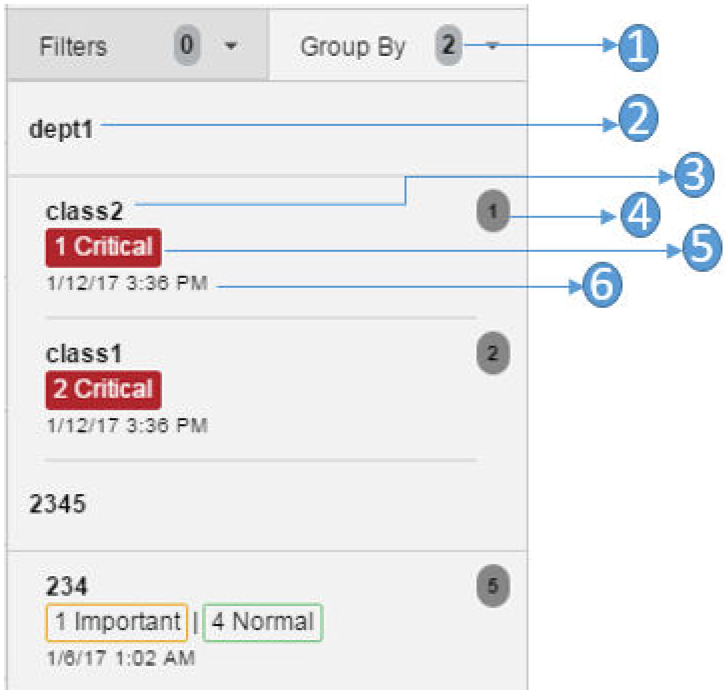
Results Panel - Summarized View

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

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

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

Figure 2-16 Results Panel - Summarized View

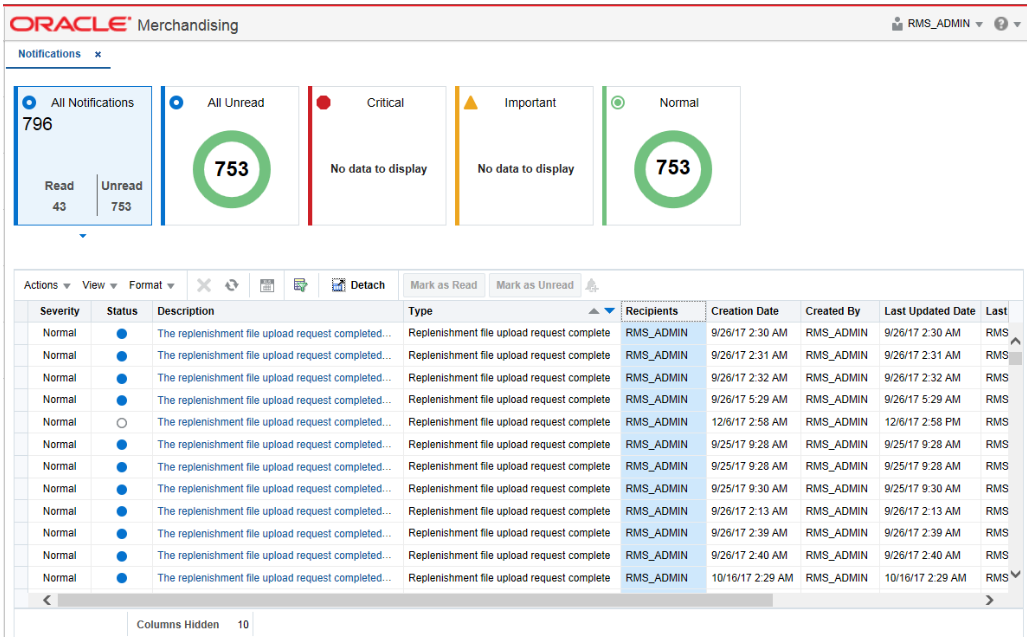


1. Indicates that both options on the Grouping Panel have been selected.
2. First level of grouping is by Department. Here the first department shown is 'dept1'.
3. The subgroup within department 'dept1'. In this example, this is the Class name.
4. The number of notifications within that combination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

All Notifications Tab

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

Figure 2-17 All Notifications

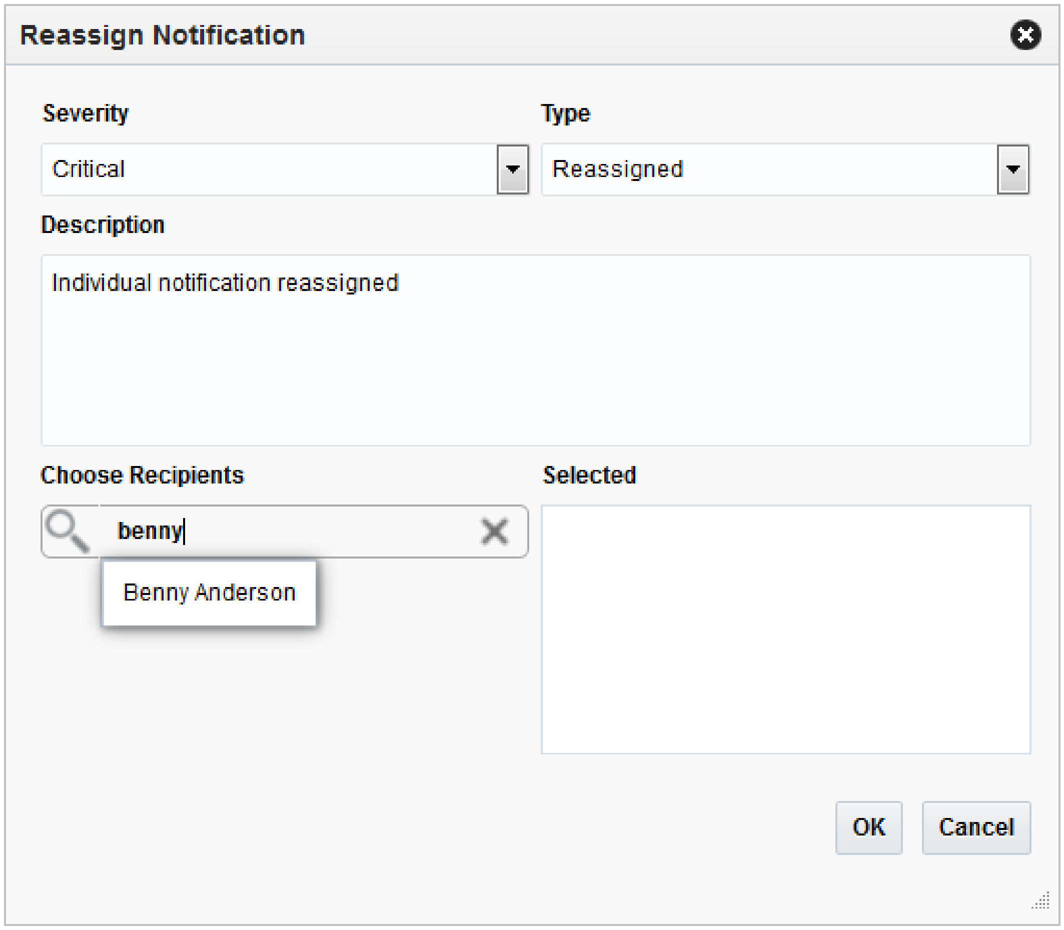


This tab lists all the Notifications for the logged-in user, regardless of whether they are in Read or Unread status. Information tiles display a break-up of the total notifications by severity. Clicking these tiles refreshes the table below to display only those notifications that are relevant to that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

You can perform the following operations from this tab.

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

Figure 2-18 Reassign Notification



The All Notifications table displays the following columns:

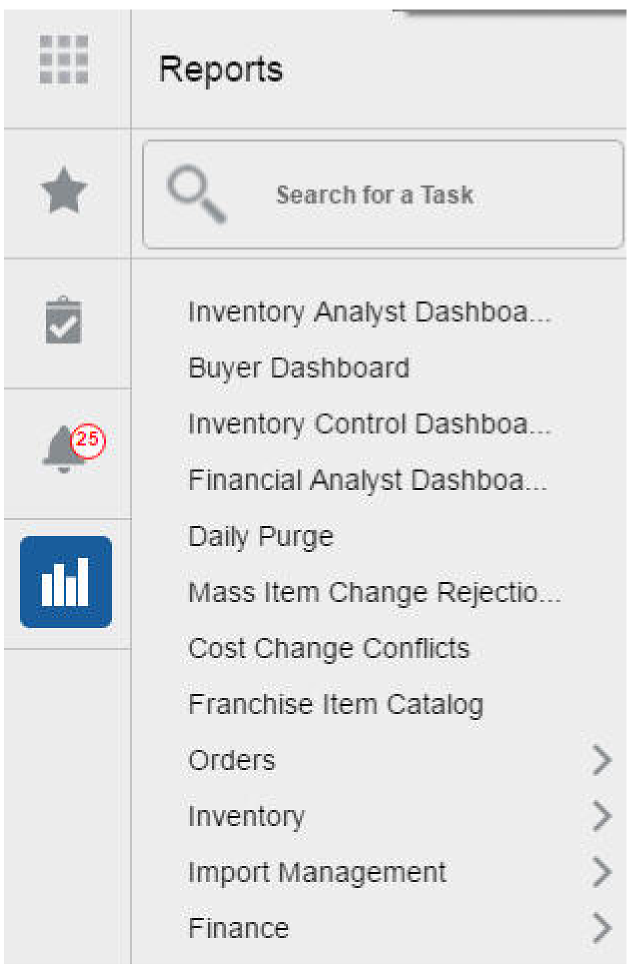
- Notification Severity - A colored label indicating the Notification Severity.
- Status - If the status is unread, an icon is shown. Otherwise it is blank.
- Description - The description of the notification itself.
- Type - The description of the Notification Type for the notification.
- Recipients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

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

Reports

The functionality of Reports works similar to the Tasks menu.

Figure 2-19 Reports Menu



Screen Level

Screen Level Action - Icons and Buttons

The screen level actions display the icons and buttons.

Figure 2-20 Screen Level Action - Icons and Buttons

Table 2-1 Screen Level Action - Icons/Buttons and Descriptions

Icon/Buttons	Description
Help icon	You can access online help for a particular page by clicking the Help icon.
Expand and Collapse icon	You can view all and collapse all the sections in the application window by clicking the Expand and Collapse icon.
Delete icon	You can delete the entity being maintained in the window by selecting the Delete icon.
Status Action Button	Depending on the status of the entity, the status action button displays. For example, Submit. Wherever applicable, this button will be available to change the status of an entity. The status will be changed to the label specified on the button. If there is more than one status to which the entity can be changed, clicking the arrow on the right side of the button will display the additional status options.
More Actions	The More Actions button will have any additional actions and options for navigating to other screens.
Save	Click **Save** to save changes and stay in the window.
Save and Close	Click **Save and Close** to save changes and exit the window.
Cancel	Click **Cancel** to exit the window without saving changes.

View all the Sections Within a Window

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

Table Level

> **Note:**
>
> Figure 2-21, Figure 2-22, Figure 2-23 are mere representation and may be different for every window/table/popup.

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

Action Menu and Icons

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

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

Figure 2-21 Sample Actions Menu and Icons

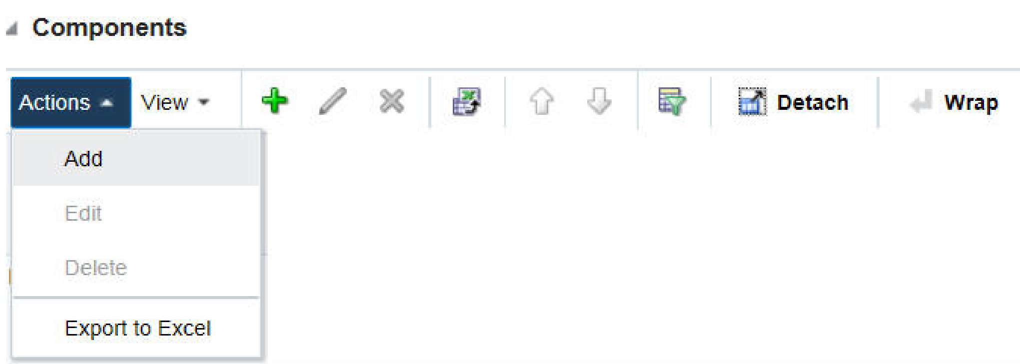


Table 2-2 Actions Menu/Icons and Descriptions of Components Section

Actions Menu/Icon	Description
Add and Add icon	You can add a row to the table by clicking **Add** from the Actions menu or by clicking the Add icon .
Edit and Edit icon	You can edit a row by selecting the desired row and clicking **Edit** from the Actions menu or by clicking the Edit icon .
Delete and Delete icon	You can delete a row by selecting the desired row and clicking **Delete** from the Actions menu or by clicking the Delete icon .
Export to Excel icon	You can save the table to a Microsoft Excel spreadsheet by clicking the Export to Excel option from the Actions menu or by clicking the Export to Excel icon .
Wrap icon	You can wrap the values in the table column by using the Wrap icon option.

Figure 2-22 Second sample Actions Menu and Icons

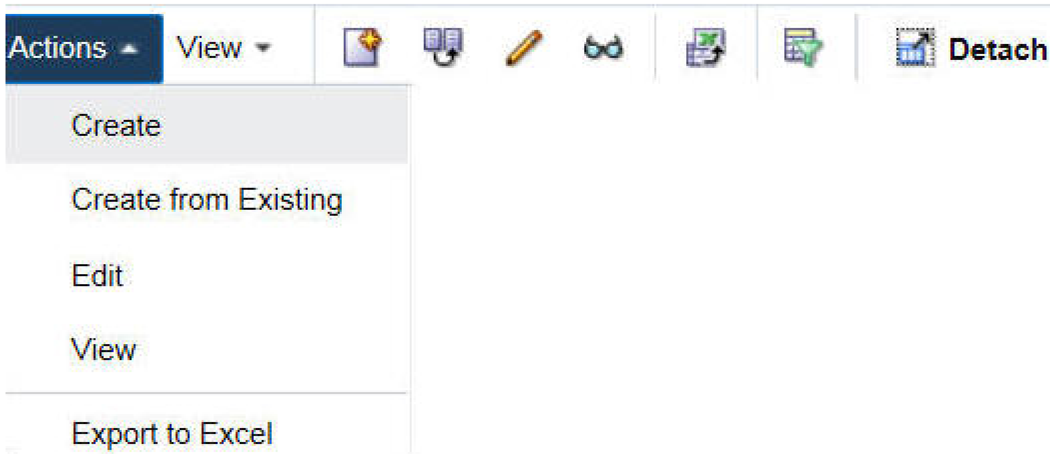


Table 2-3 Second Sample Actions Menu/Icons and Descriptions

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

View Menu

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

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

Figure 2-23 View Menu of Components Section

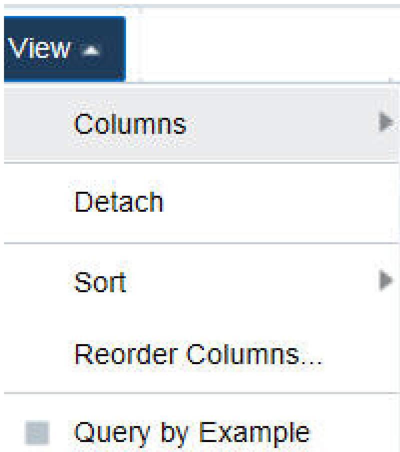


Table 2-4 Components Section - View Menu and Descriptions

View Menu List	Description
Columns	You can manage which of the columns will be shown in the table by clicking the **Show All** and **Manage Columns** options.
Detach	You can view the tables in the application in a separate window by clicking Detach or by clicking the Detach icon .
Sort	You can sort columns by the following options: • Ascending • Descending • Advanced
Reorder Columns	You can reorder columns by clicking the Reorder Columns option.
Query by Example	You can filter the rows in the table by one or multiple column values by clicking the Query by Example option or by clicking the query by example icon , and by entering the desired filter value.

Search Screens

You can search for a particular entity via search screens in the application.

To search for an entity:

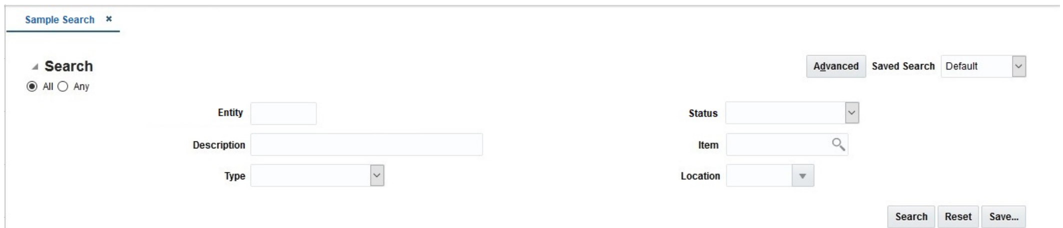
1. From the Tasks menu, select the Manage link of the desired entity. The search screen will open.
2. In the search screen you can search for the entity by providing search criteria in the search section. The criteria can be provided either in Basic or Advanced mode, depending on the requirement. Basic is the default mode when the search screen is entered. Click **Advanced** to access the search panel in advanced mode. You can return to Basic mode by clicking **Basic**.

Search for an Entity Through the Basic Search Criteria

To search for an entity through the basic search criteria:

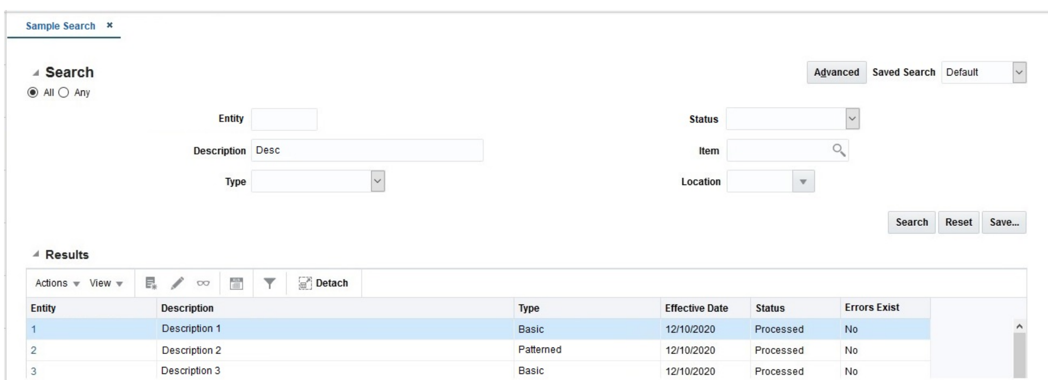
1. Enter or select one or all of the following basic search criteria.

Figure 2-24 Sample Search Screen



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

Figure 2-25 Search Results



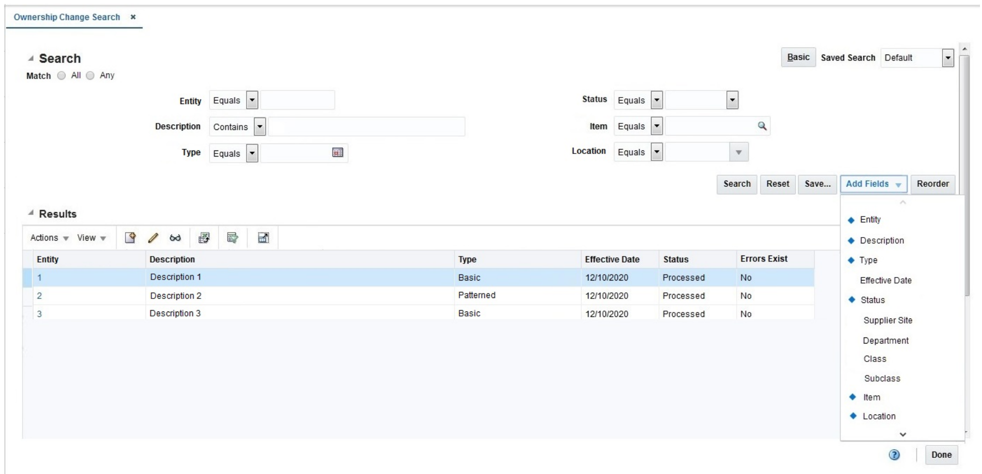
4. Click **Reset** to execute the saved search.
5. Click the **Save..** button to save the current set of search criteria as a Saved Search. The Create Saved Search window appears. For information on the Create Saved Search window, see the section Create Saved Search.
6. Click **Done** to close the window.

Search for an Entity Through the Advanced Search Criteria

To search for an entity through the advanced search criteria:

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

Figure 2-26 Search Section in Advanced Search Mode

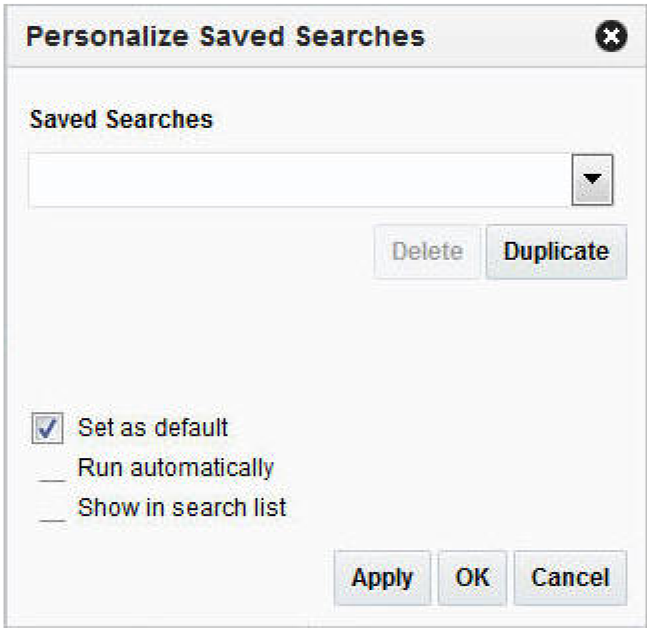


2. Click the **Add Fields...** button to add additional search criteria as desired.
3. You can also click the **Saved Search** drop down to select one of the saved sets of search criteria. Selecting a saved search will populate the criteria section with saved criteria. If the saved search is selected to run automatically then the search will be executed too. You can also choose to manage and personalize the saved searches by clicking Personalize in the list. The Personalize Saved Searches window appears. For more information on the Personalize Saved Searches, see the section Personalize Saved Search.
4. Click **Search**. The entities that match the search criteria are displayed in the Results section.
5. Click the **Save...** button to save the current set of search criteria as a Saved Search. The Create Saved Search window appears. For information on the Create Saved Search window, see the section Create Saved Search.
6. Click **Done** to close the window.

Personalize Saved Search

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

Figure 2-27 Personalize Saved Searches Window



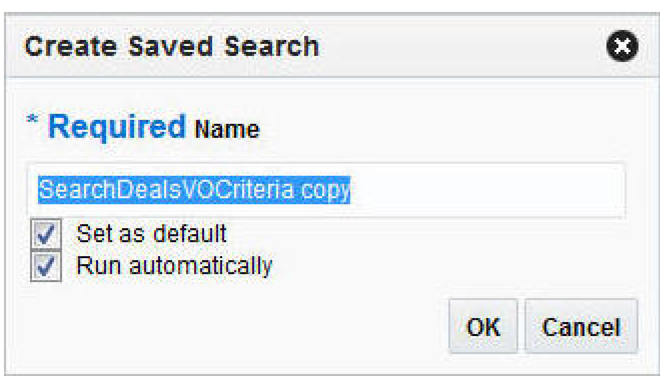
Create Saved Search

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

To view the created saved search:

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

   Figure 2-28 Create Saved Search Window

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

- Run automatically

Set User Preferences

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

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

- Regional
- Language
- Accessibility

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

Regional Options

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

Table 2-5 Regional Options

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

Language Options

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

Table 2-6 Language Options

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

Accessibility Options

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

Table 2-7 Accessibility Options

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

Accessibility

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

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

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

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

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

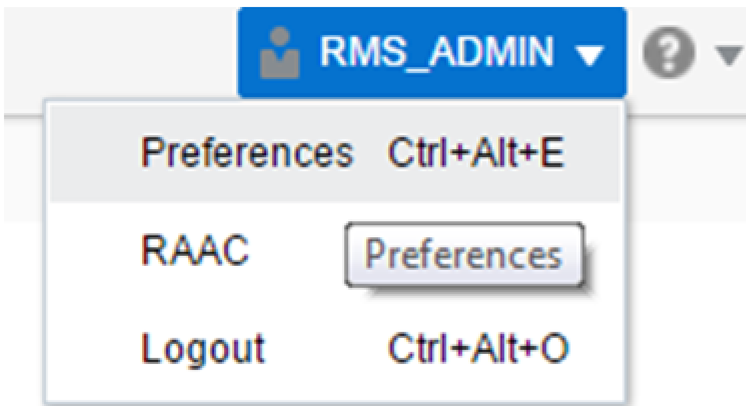
Merchandising/Sales Audit provides the ability to switch between the above accessibility support levels in the application, so that users can choose their desired type of accessibility support, if required. It exposes a user preferences screen in which the user can specify the accessibility preferences/mode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

Configure Application for Screen Reader Mode

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

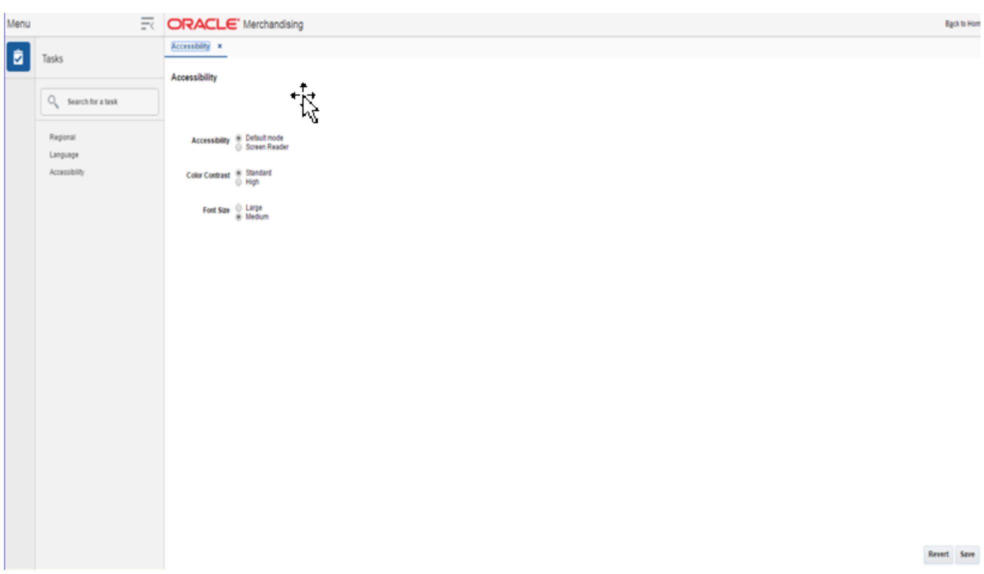
1. Log into one of the Merchandising solutions. In this example, we use Merchandising.
2. From the application home page, select **Preferences** from the logged in user menu.

Figure 2-29 Logged-in User Menu



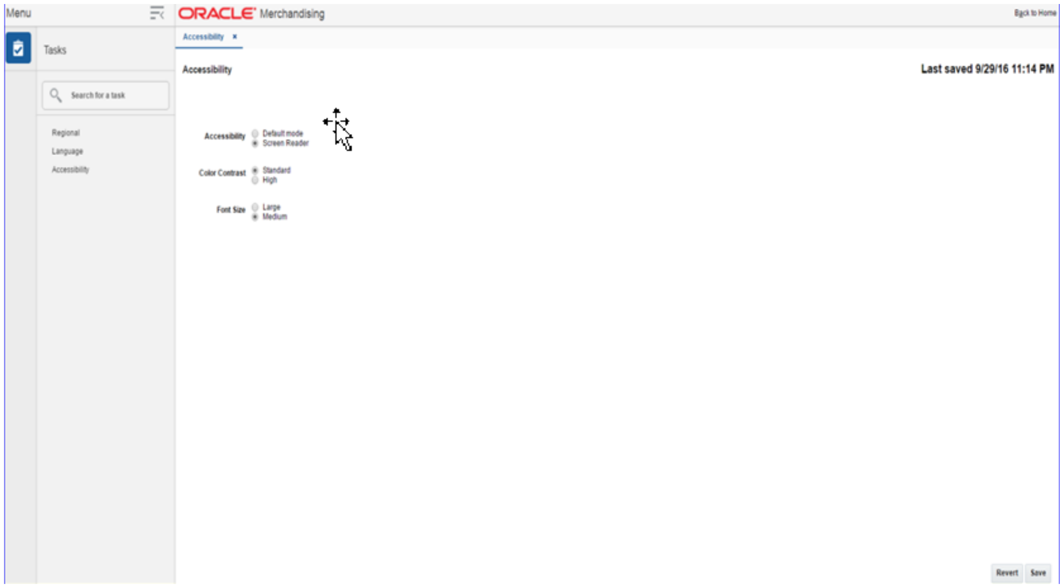
3. From the Tasks pane, click **Accessibility** to open the Accessibility tab.

Figure 2-30 Accessibility Tab



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

Figure 2-31 Enabling the Screen Reader



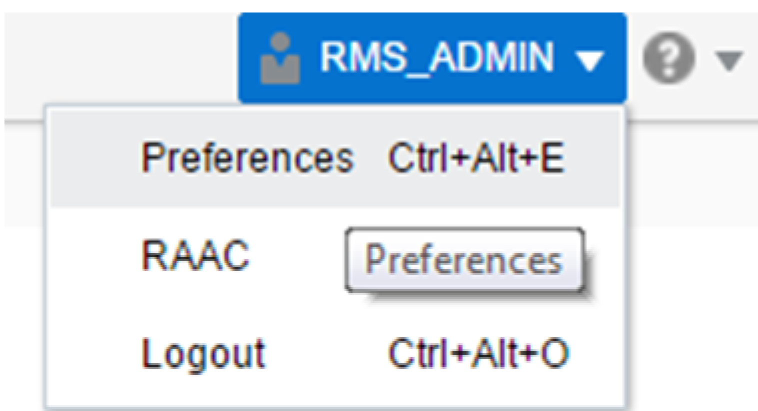
5. Click on Back to Home to return to the home page. Now the application is enabled in the screen reader mode to assist a visibly challenged user. Some of the graphical content of Operational Insights is also displayed in a tabular mode.

Set Accessibility to Default

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

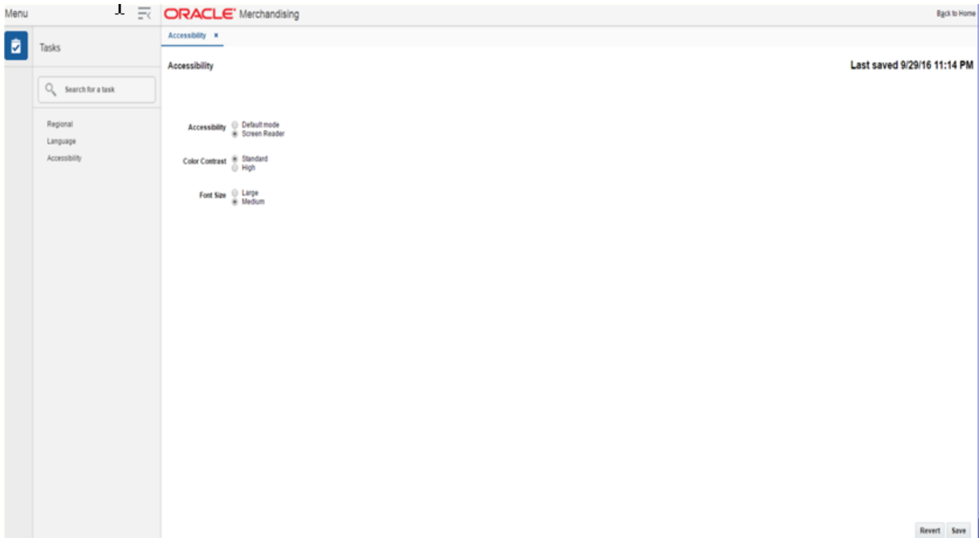
1. From the application home page, select **Preferences** from the logged in user menu.

Figure 2-32 Logged-in User Menu



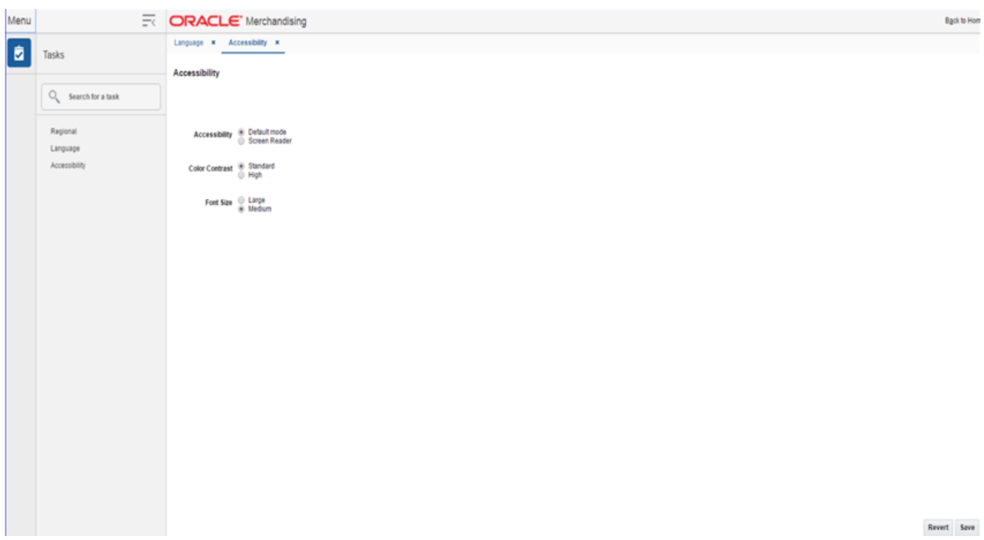
2. From the Tasks pane, click **Accessibility** to open the Accessibility tab.

Figure 2-33 Accessibility Tab



3. Select Default mode.

Figure 2-34 Accessibility Settings



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

Translate Data

You can create, modify and delete translations of data in RMS. This can be done in two different ways.

- for a single entity at a time
- view all entities that have translatable values and translate them in a centralized window.

Translations

The Translations window is a centralized window where you can see all entities that have translatable values in RMS.

The Translations window contains the following sections.

- Header

  The header contains the **Entity to Translate** field. Select the entity you want to create translations for.
- Entity to Translate
- Translations
- Translations Toolbar

Entity to Translate

Depending on the entity to translate you have selected in the header, the title of this section varies.

For example, if you select an Entity to Translate of 'Warehouse', the title of this section will be 'Warehouse' and a list of all existing warehouses in the system will display in the table. You can select the row containing the desired warehouse to see any existing translations in the Translations table below.

Use the Actions Menu and icons to apply actions to the table. You can perform the actions listed below.

Table 2-8 Entity to Translate - Actions Menu/Icons and Description

Actions Menu/Icons	Description
Export to Excel and Export to Excel icon	You can export the records in the table to a Microsoft Excel spreadsheet by selecting **Actions > Export to Excel** or by using the Export to Excel icon .

You can customize the view of the table by using the options in the View Menu.

Table 2-9 Entity to Translate - View Menu/Icons and Description

View Menu/Icons	Description
Columns	You can manage which of the columns will be shown in the table by clicking the **Show All** and **Manage Columns** options.
Detach and Detach icon	You can view the tables in the application in a separate window by clicking Detach or by using the Detach icon .
Sort	You can sort columns by the following options: • Ascending • Descending • Advanced
Reorder Columns	You can reorder columns by clicking the Reorder Columns option.

Table 2-9 (Cont.) Entity to Translate - View Menu/Icons and Description

View Menu/Icons	Description
Query by Example and Query by Example icon	You can filter the items by one or multiple column values by clicking the Query by Example option or by using the Query by Example icon .

Translations

The Translations section contains all available translations of the selected entity to translate. Existing translations can be modified directly in the table.

Use the Actions Menu and icons to apply actions to the table. In addition to editing existing translations, you can perform the actions listed below.

Table 2-10 Translations - Actions Menu/Icons and Description

Actions Menu/Icons	Description
Add and Add icon	You can add new translations by selecting **Actions** > **Add** or by using the Add icon . For more information about how to add additional translations, see the Create a Translation section.
Delete and Delete icon	You can delete a translation: • Select a record in the table. • Select **Actions > Delete** or use the Delete icon . • You are prompted, if you want to delete the record. Select **Yes** to confirm the prompt. • The record is deleted from the table.

You can customize the view of the table by using the options in the View Menu.

Table 2-11 Translations - View Menu/Icons and Description

View Menu/Icons	Description
Columns	You can manage which of the columns will be shown in the table by clicking the **Show All** and **Manage Columns** options.
Detach and Detach icon	You can view the tables in the application in a separate window by clicking Detach or by using the Detach icon .
Sort	You can sort columns by the following options: • Ascending • Descending • Advanced
Reorder Columns	You can reorder columns by clicking the Reorder Columns option.

Table 2-11 (Cont.) Translations - View Menu/Icons and Description

View Menu/Icons	Description
Query by Example and Query by Example icon	You can filter the items by one or multiple column values by clicking the Query by Example option or by using the Query by Example icon .

Translations Toolbar

The toolbar contains the following icons and buttons.

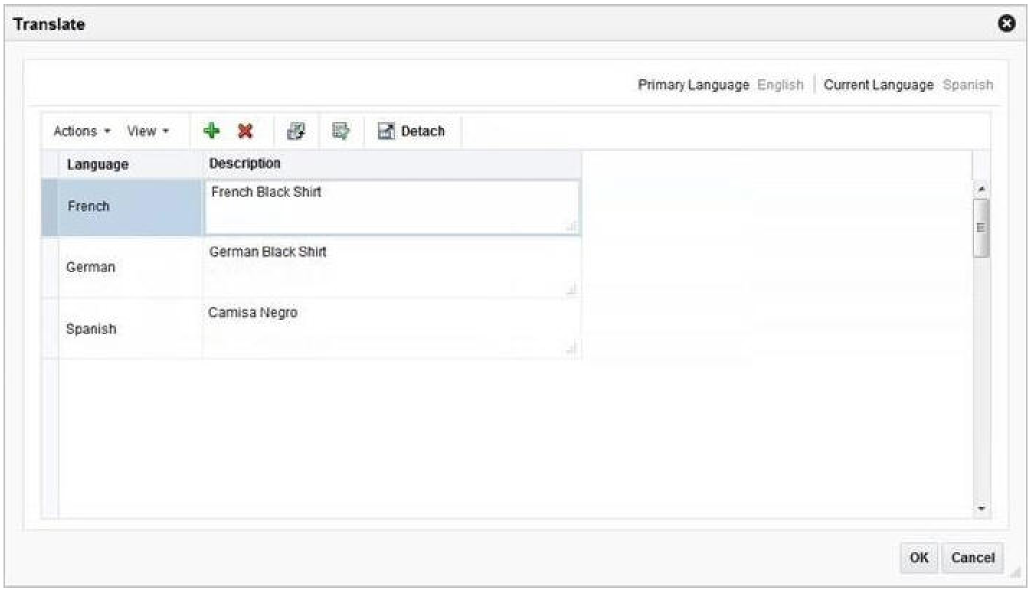
Table 2-12 Translations Toolbar - Icons/Buttons and Description

Icons/Buttons	Description
Help icon	You can access the online help for a particular page by clicking the Help icon .
Save	Click **Save** to save the entered records.
Save and Close	Click **Save and Close** to save the entered records and close the window.
Cancel	Click **Cancel** to reject all entries and close the window.

Translate a Single Entry

The Translate window for a single entry displays the system's primary language and the current language in the top right corner. The table of the Translate window displays the language and the corresponding description for the entry. Existing translations can be modified directly in the table.

Figure 2-35   Translate Window - Single Entry



Use the Actions menu and icons to apply actions to the table. In addition to editing existing translations, you can perform the actions listed below.

Table 2-13   Translate Table - Actions Menu/Icons and Description

Actions Menu/Icons	Description
Add and Add icon	You can add a translation by selecting **Actions** > **Add** or by using the Add icon . For more information about how to create a translation for a single entity, see the Create a Translation section.
Delete and Delete icon	Delete a translation: • Select a record in the Translate table. • Select **Actions > Delete** or use the Delete icon. • You are prompted, if you want to delete the record. Select **Yes** to confirm the prompt. • The translation is deleted from the table.

You can customize the view of the table. Use the View menu and icons to customize the view as listed below.

Table 2-14   Translate Table - View Menu/Icons and Description

View Menu/Icons	Description
Detach and Detach icon	You can view the tables in the application in a separate window by clicking Detach or by using the Detach icon .

Table 2-14 (Cont.) Translate Table - View Menu/Icons and Description

View Menu/Icons	Description
Sort	You can sort columns by the following options: • Ascending • Descending • Advanced
Reorder Columns	You can reorder columns by clicking the Reorder Columns option.
Query by Example and Query by Example icon	You can filter the items by one or multiple column values by clicking the Query by Example option or by using the Query by Example icon.

Translate Toolbar

The toolbar contains the following icons and buttons.

Table 2-15 Translate Toolbar - Icons/Buttons and Description

Icons/Buttons	Description
OK	Click **OK** to add your translation.
Cancel	Click **Cancel** to reject all entries and close the window.

Create a Translation

To create a translation, follow the steps below.

1. Select **Actions > Translate** or use the Translate icon , if available. The Translate window appears.
2. In the table, select **Actions > Add**, or use the Add icon . The Add Translation window appears.
3. In the **Language** field, select the desired language from the list. This field is a required field.
4. In the **Description** field, enter the desired description. This field is a required field.
5. Then choose one of the following options.
   - Click **OK** to add the translation to the table and close the window.
   - Click **OK and Add Another** to add additional translations.
   - Click **Cancel** to reject all entries and close the window.

Download/Upload Data from Spreadsheets

Data Download

The Data Download window allows you to view and maintain RMS Foundation Data through a spreadsheet.

1. You can access the Download Data window from the Task menu, select **Foundation Data > Data Loading > Download**. The Download Data window appears.

Figure 2-36 Download Data Window

2. In the **Template Type** field, select the template type from the list.
3. In the **Template** field, enter, select or search for the template you want to download.
4. Then choose one of the following options:
   - Click **Download** to download the file.
   - Click **Revert** to clear out the screen inputs.
5. Click **Done** to close the Download Data window.

Data Upload

The Upload Data window allows you to upload and maintain RMS Foundation Data through a spreadsheet.

1. You can access the Upload Data window from the Task menu, select **Foundation Data > Data Loading > Upload**. The Upload Data window appears.

Figure 2-37 Upload Data Window

2. In the **Template Type** field, select the template type from the list.

3. In the **Template** field, enter, select or search for the template you want to upload.
4. The **Process Description** field displays the default process name with the date and timestamp. You can edit the name of the upload process in this field.
5. In the **Source File** field, click the **Choose File** button to upload the file.
6. Then choose one of the following options:
   - Click **Upload** to upload the file. If error occurs during the upload process, you will get a notification.
   - Click **Revert** to clear out the screen inputs.
7. Click **Done** to close the Upload Data window.

View Data Loading Status

The Data Loading Status window allows you to view the status of the upload and download processes happening in RMS, so that you can rectify the issues associated with the upload/ download process.

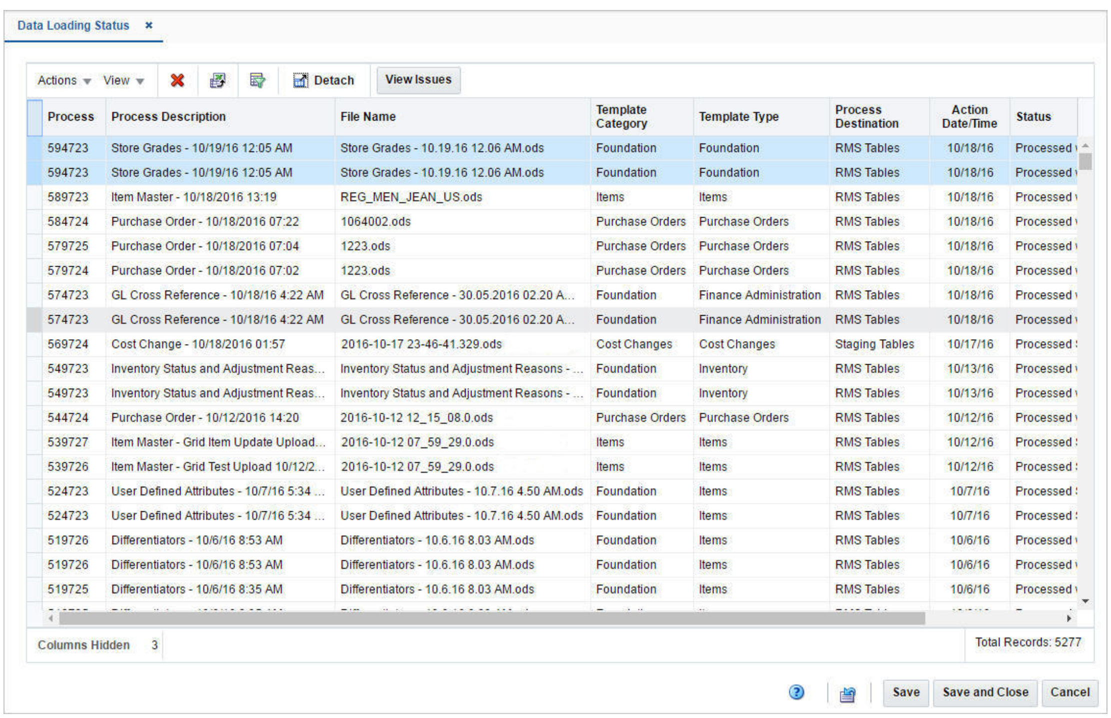
The window allows you to drill down to the errors or warnings associated with a selected upload/download request.

You can access the Data Loading Status window from the Task menu, select **Foundation Data > Data Loading > Review Status**. The Data Loading Status window appears.

The Data Loading Status window contains the following sections.

- Table
- Data Loading Status Toolbar

Figure 2-38 Data Loading Status Window



Table

The table displays the process, process description, file name, template category and type, destination, action date and time, status and the user, who initiated the process.

Table - Actions Menu and Icons

Use the Actions Menu and icons to apply actions to the table. You can perform the actions listed below.

Table 2-16 Data Loading Status Table - Actions Menu/Icons and Description

Actions Menu/Icons	Description
Delete and Delete icon	You can delete a process by using the following steps: • Select a record in the table. • Select **Actions > Delete** or use the Delete icon . • You are prompted, if you want to delete the record. Select **Yes** to confirm the prompt. • The record is deleted from the table.
Export to Excel and Export to Excel icon	You can export the records in the table to a Microsoft Excel spreadsheet by selecting **Actions > Export to Excel** or by using the Export to Excel icon .
View Issues and **View Issues** button	To view the warnings and errors associated with a selected upload/download request: • Select a record in the table. • Select **Actions > View Issues** or use the **View Issues** button. The Issues window appears. • Click **Done** to close the window.
Upload to RMS	With this option you can upload the selected process from Staging to RMS. This option is only enabled for records which have Staging Tables as a destination and do not hold the status “Processed with Errors". Additionally, this option is only enabled for Item induction, Cost Change induction and Order induction records.
Download Staged	This option allows you to download the staged records of a process to a spreadsheet. • Select a record in the table. • Select **Actions > Download Staged**. The staged record are downloaded to your desktop. This option is only enabled for Item induction, Cost Change induction and Order induction records.

Data Loading Status - View Menu and Icons

You can customize the view of the table by using the options in the View Menu.

Table 2-17 Table Data Loading Status - View Menu/Icons and Description

View Menu/Icons	Description
Columns	You can manage which of the columns will be shown in the table by clicking the **Show All** and **Manage Columns** options.
Detach and Detach icon	You can view the table in the application in a separate window by clicking Detach or by using the Detach icon .
Sort	You can sort columns by the following options: • Ascending • Descending • Advanced
Reorder Columns	You can reorder columns by clicking the Reorder Columns option.
Query by Example and Query by Example icon	You can filter the items by one or multiple column values by clicking the Query by Example option or by using the Query by Example icon .

Data Loading Status Toolbar

The toolbar contains the following icons and buttons.

Table 2-18 Data Loading Status Toolbar - Icons/Buttons and Description

Icons/Buttons	Description
Help icon	You can access the online help for a particular page by clicking the Help icon .
Refresh icon	You can refresh the window by clicking the Refresh icon. All entries are reset and not saved.
Save	Click **Save** to save the entered records.
Save and Close	Click **Save and Close** to save the entered records and close the window.
Cancel	Click **Cancel** to reject all entries and close the window.
Done	If you open the window in view mode, the **Done** button is displayed. Click **Done** to close the window.