Oracle® Retail Import Management Do the Basics User Guide



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

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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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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- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take



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To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times not be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Help Center Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

Oracle Retail product documentation is available on the following web site: Oracle Help Center

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Help Center (docs.oracle.com)

Oracle Retail product documentation is 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.
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

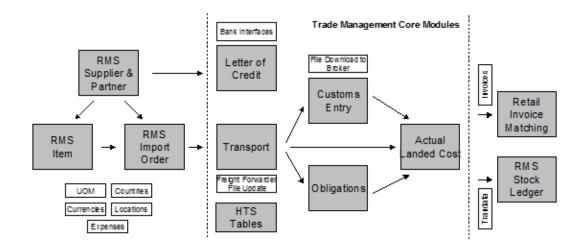
The Oracle Retail Trade Management application allows retailers to perform the following Trade Management tasks.

- 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

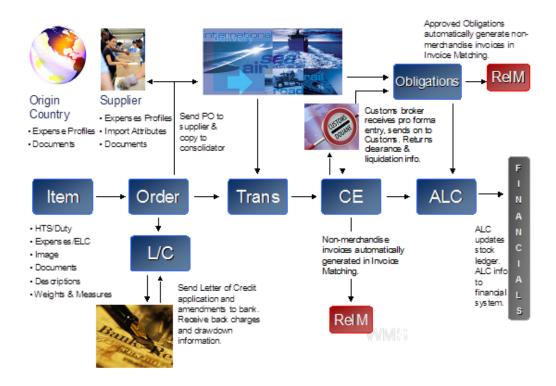
The Retail Trade Management Product/Solution:

- 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

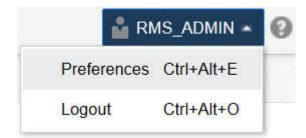
* Username		
* Password		

- 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.

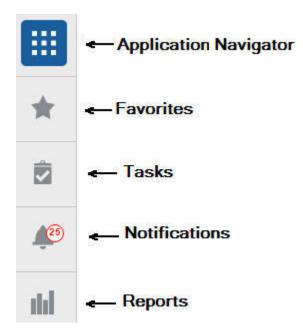


Figure 2-4 Navigation Bar

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

Application Navigator	
Merchandising	

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.

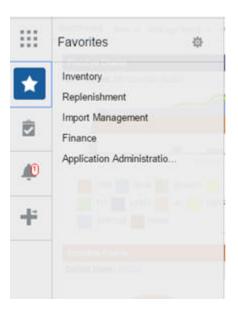


Figure 2-6 Favorites Area

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.



Figure 2-7 Tasks Menu

Tasks	
Search for a task	
Foundation Data	>
Items	>
Cost	>
Price	>
Orders	>
Inventory	>
Replenishment	>
Import Management	>
Finance	>
Application Administration	>

Notifications

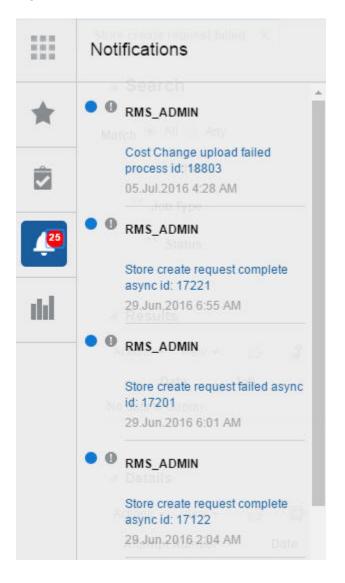
Notifications bring events within the application to your attention.

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).



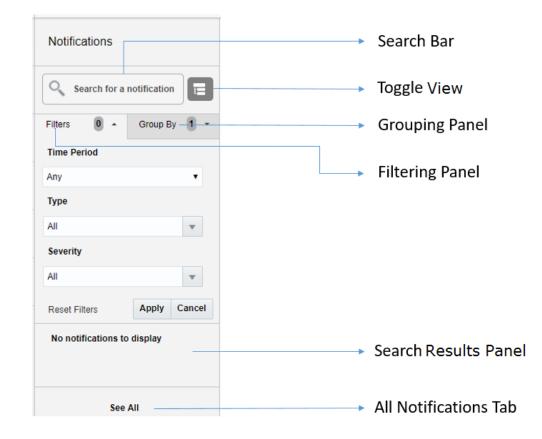


Figure 2-10 Notifications Sidebar

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.



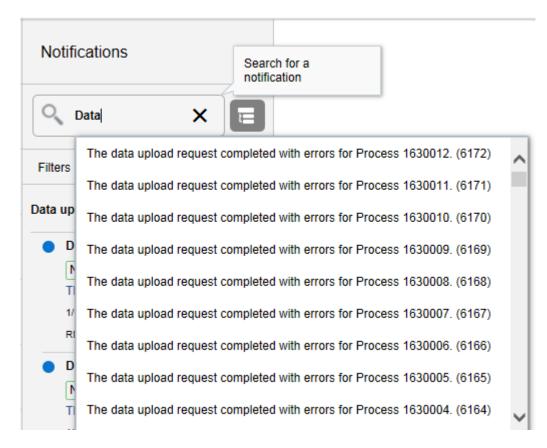


Figure 2-11 Search Bar

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 F	iltering	Panel
----------	-------	----------	-------

Filters 0 •	Group By 🚺 👻
Time Period	
Any	•
Туре	
All	-
Severity	
All	•
Reset Filters	Apply Cancel

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

Filters 0 -	Group B	y 1 •
Group by		
Туре		•
Then by		
No Selection		•
Reset Grouping	Apply	Cancel

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.



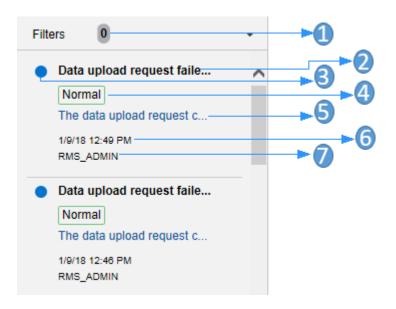


Figure 2-14 Results Panel - List View

- **1.** Indicates that no filtering was done.
- 2. Notification Type A description of the Type is displayed.
- 3. Read/Unread A blue icon Q 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.



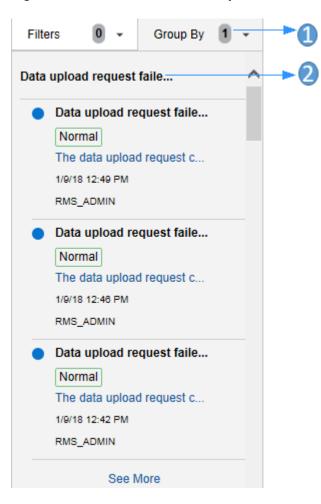


Figure 2-15 Results Panel - Grouped View

- 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.



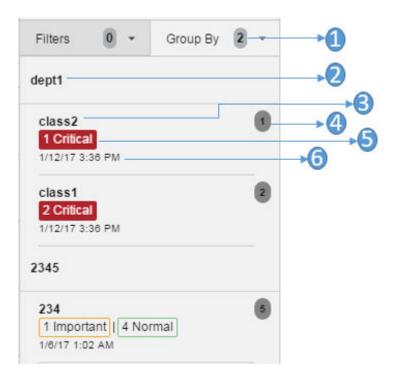


Figure 2-16 Results Panel - Summarized View

- **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.



RACLE' Merchandising							RMS_ADMIN	0		
tifications	*									
All Notifi	ications	 All Unread 	Critica	ll -	Limportant	Normal				
Read 43	Unread 753	753	No data to dis	splay	No data to display	753				
• tions ▼ Vie	ew 🔻 Forn	nat 🔻 🗙 🐼 🛅 🗟	Detach	Mark as Re	ead Mark as Unread 🛕					
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Severity	Status	Description		Туре	▲ ▼	Recipients	Creation Date	Created By	Last Updated Date	
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Severity Normal Normal Normal Normal Normal Normal Normal Normal Normal	Status	Description The replenishment file upload re	equest completed equest completed equest completed equest completed equest completed equest completed equest completed equest completed equest completed	Replenishm Replenishm Replenishm Replenishm Replenishm Replenishm Replenishm Replenishm Replenishm	ent file upload request complete ent file upload request complete	RMS_ADMIN RMS_ADMIN RMS_ADMIN RMS_ADMIN RMS_ADMIN RMS_ADMIN RMS_ADMIN RMS_ADMIN RMS_ADMIN	9/26/17 2:30 AM 9/26/17 2:31 AM 9/26/17 2:32 AM 9/26/17 2:32 AM 9/26/17 2:58 AM 9/25/17 9:28 AM 9/25/17 9:28 AM 9/25/17 9:30 AM 9/26/17 2:13 AM	RMS_ADMIN RMS_ADMIN RMS_ADMIN RMS_ADMIN RMS_ADMIN RMS_ADMIN RMS_ADMIN RMS_ADMIN RMS_ADMIN	9/26/17 2:30 AM 9/26/17 2:31 AM 9/26/17 2:32 AM 9/26/17 2:32 AM 9/26/17 2:58 PM 9/25/17 9:28 AM 9/25/17 9:30 AM 9/25/17 9:30 AM 9/26/17 2:13 AM	RM RM RM RM RM RM RM RM RM

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 X 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.



Severity			Туре	
Critical		•	Reassigned	
Description				
Individual notific	cation reassigned			
Choose Recipie	nts		Selected	
o benny		×		
-	nderson	×		
o benny	nderson	X		
o benny	nderson	X		
o benny	nderson	×		

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 Q 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.

	Reports	
*	Search for a Task	
	Inventory Analyst Dashboa Buyer Dashboard	
25	Inventory Control Dashboa Financial Analyst Dashboa	
	Daily Purge Mass Item Change Rejectio Cost Change Conflicts Franchise Item Catalog	
	Orders	>
	Inventory	>
	Import Management	>
	Finance	>

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
-------------	---

?	-	G	×	Submit	More Actions	•	Save	Save and Close	Cancel	
---	---	---	---	--------	--------------	---	------	----------------	--------	--

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 X	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 ¹/₁. You can shrink all the sections in the window by clicking the Shrink icon ¹/₁.

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

Components

Actions - View -	+	1	8	3	Ŷ	J	detach	🚽 Wrap
Add								
Edit								
Delete								
Export to Excel								

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 <table-cell-rows></table-cell-rows>
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 \checkmark .
Delete and Delete icon X	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.



Actions 🔺	View -	P	ų	1	60	野	🛃 Detach
Create	•						
Create	from Existi	ing					
Edit							
View							
Export	to Excel						

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 men				
	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 bod.				
Export to Excel icon 避	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.



View		
C	Columns	
٢	Detach	
ş	Sort	Þ
F	Reorder Columns	
	Query by Example	

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 with 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

Search					Advanced	Saved Search	Default	
All 🔿 Any								
	Entity			Status	~			
	Description			Item	9			
	Туре	~	L	ocation	T			

- 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.

Search						Adva	anced Saved	d Search	Default	
● All () Any	Entity				Status		~			
	Description	Desc			Item	(2			
	Туре		~		Location	•				
4 Posulte							:	Search	Reset	Save.
Actions View V	E. / 🖺	▼ ∰ Detach						Search	Reset	Save.
	E Construction	▼ ∰ Detach		Туре	Effective Date	Status	Errors Exist		Reset	Save.
Actions + View +		T Detach		Type Basic	Effective Date 12/10/2020	Status Processed			Reset	Save
Actions + View +	Description	▼ and Detach					Errors Exist		Reset	Save

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.

All Any All									asic Sav	aved Search Default	
	Entity	Equals 💌		Status	Equals	-	-				
	Description	Contains 💌		Item	Equals	•		Q			
	Туре	Equals 💌		Location	Equals	•					
							Search	Reset	Save	Add Fields 🔻	Reord
Results	/ 60 🗗									 Entity Description 	
Entity	Description		Туре	Effectiv	e Date	Status	Erro	rs Exist		 Type 	
1	Description Description 1		Basic	Effectiv 12/10/2		Status Processed	No	rs Exist		 Type Effective Date 	е
	Description 1 Description 2				020			ors Exist			0
1	Description 1		Basic	12/10/2	020 020	Processed	No	rs Exist		Effective Dat	
1	Description 1 Description 2		Basic Patterned	12/10/2	020 020	Processed Processed	No No	rs Exist		Effective Dat Status	le
1 2	Description 1 Description 2		Basic Patterned	12/10/2	020 020	Processed Processed	No No	rs Exist		Effective Dat Status Supplier Si	le
1 2	Description 1 Description 2		Basic Patterned	12/10/2	020 020	Processed Processed	No No	rs Exist		Effective Dat Status Supplier Si Departmen	le
1	Description 1 Description 2		Basic Patterned	12/10/2	020 020	Processed Processed	No No	ors Exist		Effective Dat Status Supplier Si Departmen Class	le
1 2	Description 1 Description 2		Basic Patterned	12/10/2	020 020	Processed Processed	No No	ors Exist		Effective Da Status Supplier S Departmer Class Subclass	it

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.
- 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.



reisonalize saveu s	earches		C
Saved Searches			
	Dele	ete	Duplicate
Set as default			
Set as default Run automatically Show in search list			

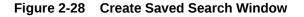
Figure 2-27 Personalize Saved Searches Window

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.



Create Saved Search	8
* Required Name	
SearchDealsVOCriteria co	py
 Set as default Run automatically 	
	OK Cancel

- 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.

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.

Table 2-5 Regional Options

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.



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.

Table 2-7	Accessibility	Options
-----------	---------------	---------

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 highcontrast 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.

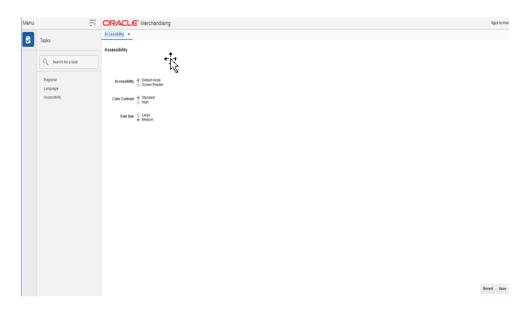
- **1.** Log into one of the Merchandising solutions. In this example, we use Merchandising.
- 2. From the application home page, select **Preferences** from the logged in user menu.

🔓 RMS_ADMIN 👻	0 -
Preferences Ctrl+Alt+E	
RAAC Preferences	
Logout Ctrl+Alt+O	

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**.

un		Bgck to H
Tasks	Accessibility ×	
	Accessibility	Last saved 9/29/16 11:14 P
Q Search for a task	•	
Regional	Accessibility Default mode Some Rader	
Language Accessibility		
	Colar Contrast 🛞 Standard	
	Font Size () Large	
		Revert 5a

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.

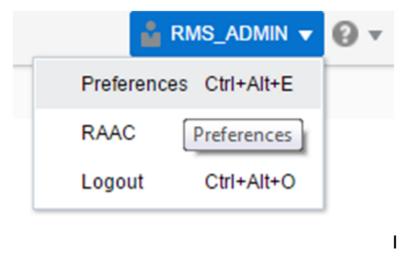


Figure 2-32 Logged-in User Menu

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



Menu 🕹 🗮	ORACLE' Merchandising	Bigck to Home
Tasks	Accessibility ×	
	Accessibility	Last saved 9/29/16 11:14 PM
Q ₆ Search for a task		
Regional Language	Accessibility 2 Default mode # Screen Reader	
Accessibility	Color Contrast 👋 Standard 💛 High	
	Fost Sax ① Large * Medium	
		Revert Save

Figure 2-33 Accessibility Tab

3. Select Default mode.

Figure 2-34 Accessibility Settings

enu		rchandising	Bgck
Tasks	Language × Accessibilit	Ay x	
Q Search fo	Accessibility		
Regional Language	Accessibility * Defa	vit mode een Reader	
Accessibility	Color Contrast 👋 Stan	váard X	
	Font Size O Large	je Sum	
			Revert

- 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.



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

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

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 X	You can delete a translation:Select a record in the table.
	 Select Actions > Delete or use the Delete icon X. 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.



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

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

Translations Toolbar

The toolbar contains the following icons and buttons.

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

Icons/Buttons	Description	
Help icon ③	You can access the online help for a particular page by clicking the Help icon $\textcircled{3}$.	
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.



		Primary Language English Current Language Span
Actions + View +	💠 💥 🚱 🗟 Detach	
Language	Description	
French	French Black Shirt	
rienui		e.
German	German Black Shirt	
German		
	Camisa Negro	
Spanish		

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 X	 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 📶.



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

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

The toolbar contains the following icons and buttons.

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

Icons/Buttons	Description
ОК	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.

 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

Template Type	*			
Template		-		

- 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.

 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

Template Type	•	Process Description		
Template		 Source File	Choose File No file chosen	
12.5017 4 27255%				

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

Actions 🐨	View w	×	3		🚮 Det	ach	View Issues					
Process	Process	Descr	iption			File N	ame	Template Category	Template Type	Process Destination	Action Date/Time	Status
594723	Store Gra	ides - 1	0/19/16	12:05 A	AM	Store	Grades - 10.19.16 12.06 AM.ods	Foundation	Foundation	RMS Tables	10/18/16	Processed
594723	Store Gra	ides - 1	0/19/16	12:05 /	AM	Store	Grades - 10.19.16 12.06 AM.ods	Foundation	Foundation	RMS Tables	10/18/16	Processed
589723	Item Mas	ter - 10	/18/201	6 13:19		REG_	MEN_JEAN_US.ods	Items	Items	RMS Tables	10/18/16	Processed
584724	Purchase	Order	- 10/18/	2016 0	7:22	10640	102.ods	Purchase Orders	Purchase Orders	RMS Tables	10/18/16	Processed
579725	Purchase	Order	- 10/18/	2016 07	7:04	1223.	ods	Purchase Orders	Purchase Orders	RMS Tables	10/18/16	Processed
579724	Purchase	Order	- 10/18/	2016 01	7:02	1223.	ods	Purchase Orders	Purchase Orders	RMS Tables	10/18/16	Processed
574723	GL Cross	Refer	ence - 1	0/18/16	4:22 AM	GL Cr	oss Reference - 30.05.2016 02.20 A	Foundation	Finance Administration	RMS Tables	10/18/16	Processed
574723	GL Cross	Refer	ence - 1	0/18/16	4:22 AM	GL Cr	oss Reference - 30.05.2016 02.20 A	Foundation	Finance Administration	RMS Tables	10/18/16	Processed
569724	Cost Cha	nge - 1	0/18/20	16 01:5	7	2016-	10-17 23-46-41.329.ods	Cost Changes	Cost Changes	Staging Tables	10/17/16	Processed
549723	Inventory	Status	atus and Adjustment Reas		djustment Reas		ory Status and Adjustment Reasons	Foundation	Inventory	RMS Tables	10/13/16	Processed
549723	Inventory	y Status and Adjustment Reas		nventory Status and Adjustment Reas		Invent	ory Status and Adjustment Reasons	Foundation	Inventory	RMS Tables	10/13/16	Processed
544724	Purchase	Purchase Order - 10/12/2016 14:20		2016-	10-12 12_15_08.0.ods	Purchase Orders	Purchase Orders	RMS Tables	10/12/16	Processed		
539727	Item Mas	ter - Gr	id Item (Jpdate I	Jpload	2016-	10-12 07_59_29.0.ods	Items	Items	RMS Tables	10/12/16	Processed
539726	Item Mas	ter - Gr	id Test L	pload 1	0/12/2	2016-	10-12 07_59_29.0.ods	Items	Items	RMS Tables	10/12/16	Processed
524723	User Def	ined At	tributes	- 10/7/1	6 5:34	User	Defined Attributes - 10.7.16 4.50 AM.ods	Foundation	Items	RMS Tables	10/7/16	Processed
524723	User Def	ined At	tributes	- 10/7/1	6 5:34	User [Defined Attributes - 10.7.16 4.50 AM.ods	Foundation	Items	RMS Tables	10/7/16	Processed
519726	Differenti	ators -	10/6/16	8:53 AN	1	Differe	entiators - 10.6.16 8.03 AM.ods	Foundation	Items	RMS Tables	10/6/16	Processed
519726	Differenti	ators -	10/6/16	8:53 AN	1	Differe	entiators - 10.6.16 8.03 AM.ods	Foundation	Items	RMS Tables	10/6/16	Processed
519725	Differenti	ators -	10/6/16	8:35 AN	1	Differe	entiators - 10.6.16 8.03 AM.ods	Foundation	Items	RMS Tables	10/6/16	Processed
4					•	- 04	· · · · · · · · · · · · · · · · · · ·					-
Columns H	idden 3										Total	Records: 52



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.

Actions Menu/Icons	Description
Delete and Delete icon X	 You can delete a process by using the following steps: Select a record in the table. Select Actions > Delete or use the Delete icon X. 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.

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

Data Loading Status - View Menu and Icons

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



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

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

Data Loading Status Toolbar

The toolbar contains the following icons and buttons.

Table 2-18	Data Loading Status Toolbar - Icons/Buttons and Description
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Icons/Buttons	Description
Help icon	You can access the online help for a particular page by clicking the Help icon $\textcircled{2}$.
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.

