Oracle® Retail Merchandising Foundation Cloud Service

Do the Basics User Guide

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Oracle Retail Merchandising Foundation Cloud Service Do the Basics User Guide, Release 23.1.401.0

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Primary Author:

Contributing Authors:

Contributors:

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Preface

This document describes the Oracle Retail Merchandising 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 Merchandising. This includes merchandisers, buyers, business analysts, and administrative personnel.

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- Exact error message received
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Oracle Retail product documentation is available on the following web site:

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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
Do the Basics

The Oracle Retail Merchandising Suite of solutions include some common interface options and controls that you can use throughout the applications and are common across solutions. The following sections describe these user interface controls in more detail.

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:

- Logging In to the Application
- Logging Out of the Application
- User Help

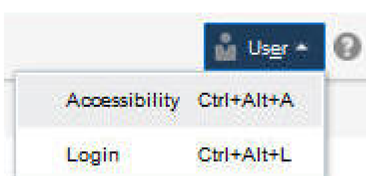
Log In and Out

Logging In to the Application

To log on to the application:

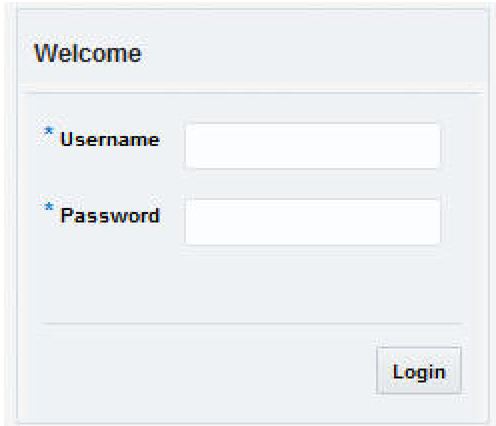
1. Click the **User** list which is to the top right of the Oracle Merchandising application.

Figure 1-1 User Menu



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

Figure 1-2 Welcome Screen

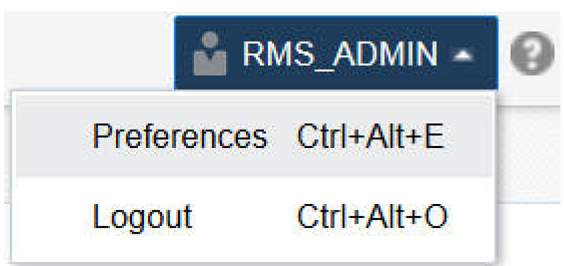


3. Provide the following login information:
   a. Enter your user name in the **Username** field.
   b. Enter your password in the **Password** field.
4. Click **Login**.

Logging Out of the Application

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

Figure 1-3 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  available on every page of some of the applications. Once in the help, you can access additional information through the table of contents or by using the index.

2

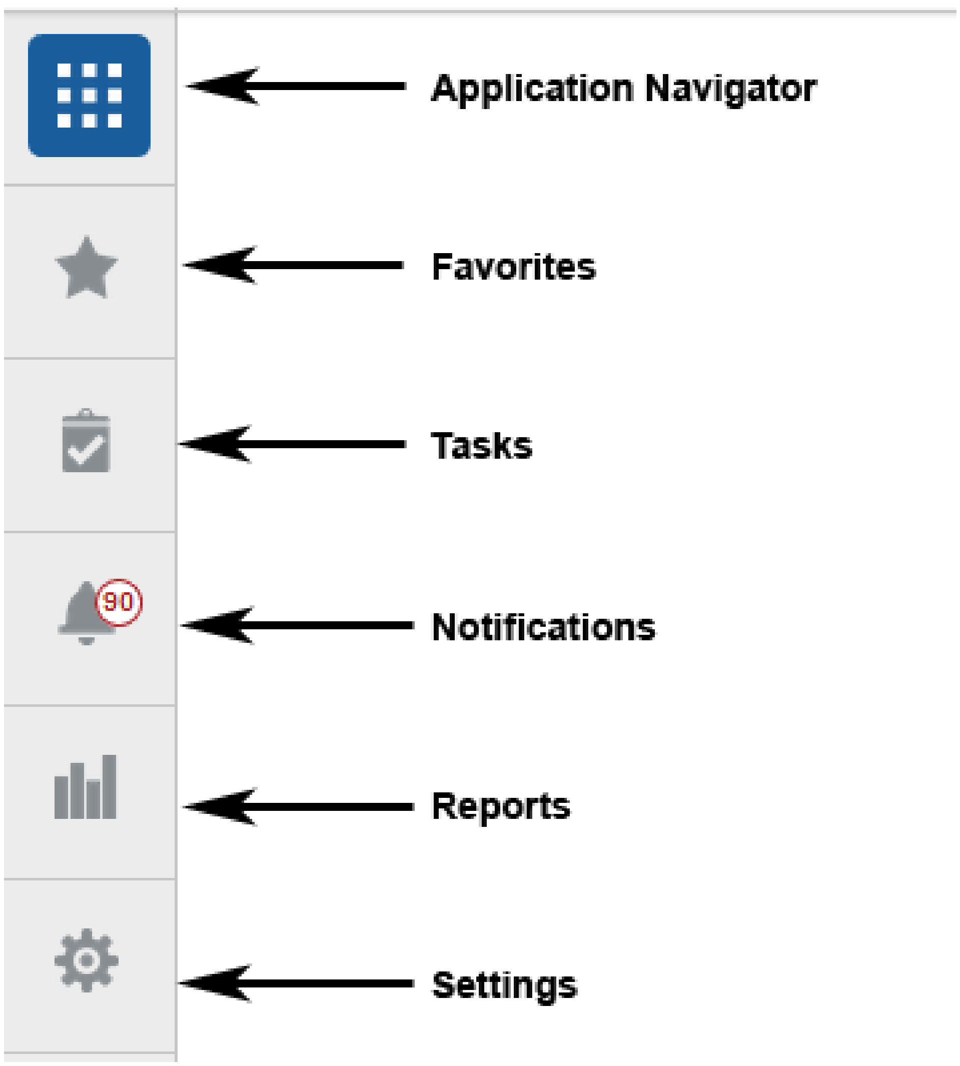
Common Actions and Items

This section describes some of the common actions, menus, and icons that you see throughout Merchandising to help familiarize you with how to navigate through the solution.

Task Bar Options

You can quickly access the tasks for Merchandising and switch to other Merchandising Suite solutions from the Navigation bar.

Figure 2-1 Sidebar Menu



The following navigation bar options are common across all the Merchandising Suite solutions:

- Application Navigator
- Favorites
- Tasks
- Notifications
- Reports
- Settings

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

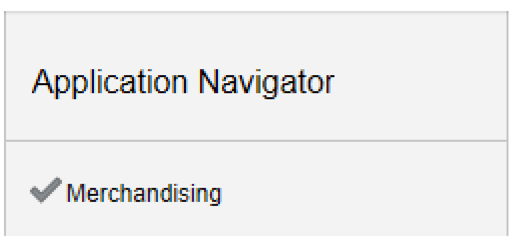
Application Navigator

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

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 2-2 Application Navigator

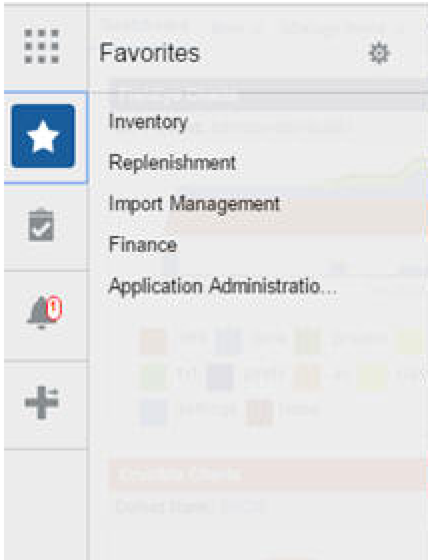
2. Select from the listed applications. The application will open in a new tab.

Favorites

You can select your favorite tasks without accessing the Task Bar 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 Favorites list. Tasks can be selected or deselected as favorites in the Tasks menu by clicking on the star icon next to the task item.

Figure 2-3 Favorites Area



Tasks

A task is a link to a task flow to accomplish a business process or procedure. For example, a task may be creating a purchase order or editing a previously created item.

Your Tasks list appears in the Task Bar. 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.

> **Note:**
>
> Your task menu may appear slightly different, depending on which tasks you have privilege to access. By default the tasks are organized into folders in the Grouped View, clicking the List View button toggles to a fully expanded list of all the tasks which allows you to scroll more quickly to the desired task.

> **Note:**
>
> When the Merchandising end of day batch jobs are running, the online task flow screens are unavailable. Prior to the batch jobs starting, users are warned to save their work and exit. After a period of approximately five minutes, the batch run starts and users are logged out of the online application. They are not able to access any tasks in the applications until the batch schedule has completed.

Figure 2-4 Tasks Menu – Grouped View

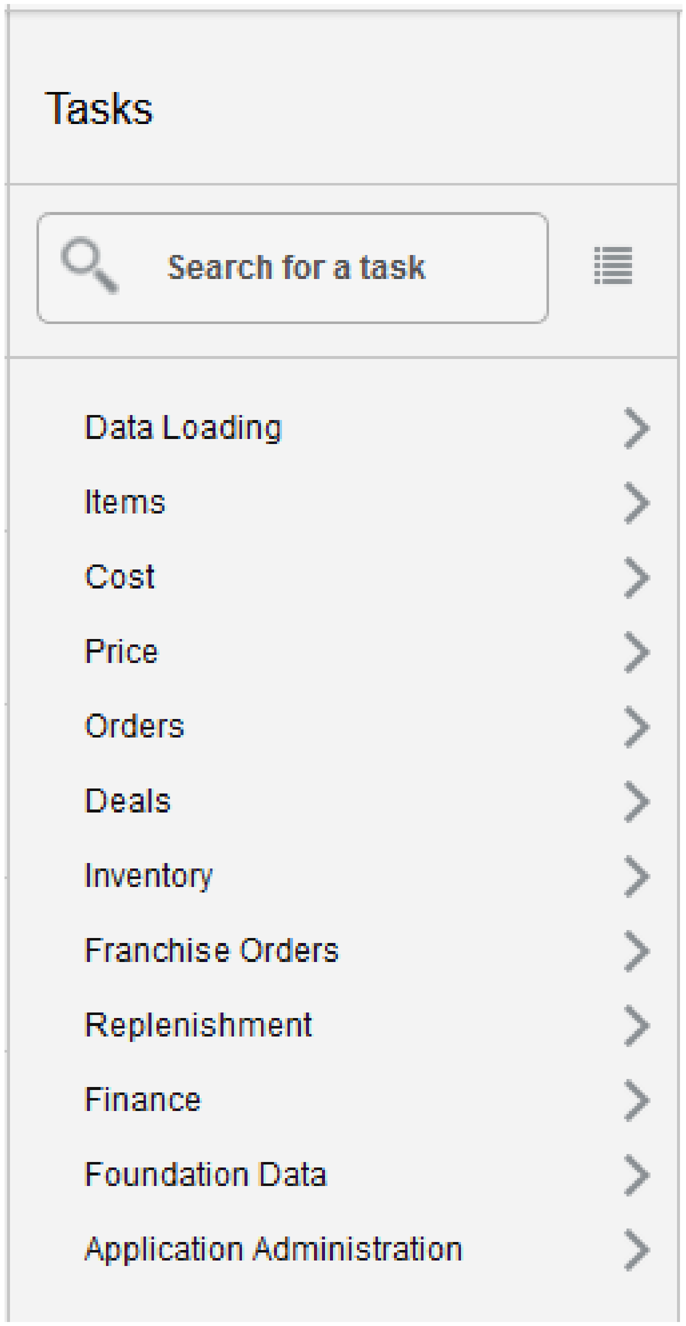
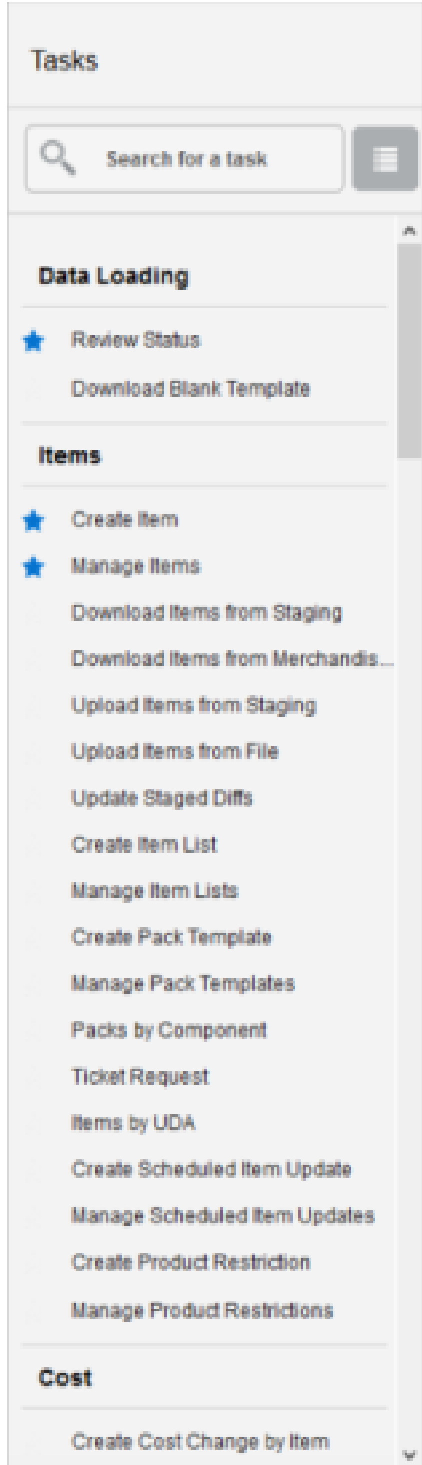


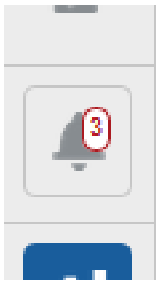
Figure 2-5 Tasks Menu – List View



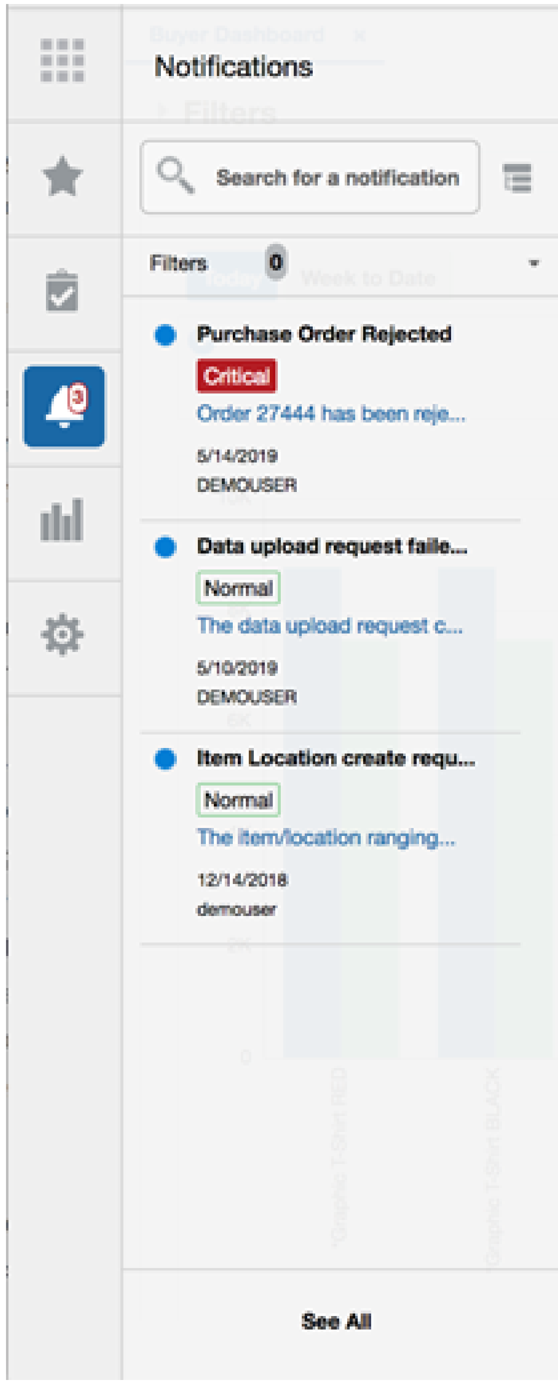
Notifications

The Notifications functionality is a component built into Merchandising to support raising events to a user's attention. For example, this could be used to alert you to the completion of a background process or the rejection of a transaction you submitted for approval.

If a notification has been raised, you will see the number on the notification icon on the task bar go up, similar to receiving a new email.



Clicking on this icon will show you a quick view of your most recent unread notifications, including a short description of what triggered the notification, its severity, when it was raised, and the user ID indicating whose action triggered it be raised. There will also be a hyperlink available for the notification. Clicking on this hyperlink will take you to the page where you can take action or view the details related to that specific notification. For example, if you are being notified that a purchase order that you submitted for approval was rejected, clicking on the hyperlink would take you to the purchase order so that you can review the comments from the approver and make the appropriate adjustments.



The following notifications are included in Merchandising:

Cost Change Induction

One of the following notifications is raised for cost change downloads and uploads based on the action you've taken and whether it was successful or resulted in errors. Clicking on the hyperlink for this notification will take you to the Data Loading Status screen to review the details of the specific process that resulted in the notification.

- Download Complete (note: only raised when download occurs in the background based on large files size)
- Download Failed
- Upload Complete
- Upload Failed

Foundation Data

One of the following notifications is raised if the download or upload of any of the data entities managed via the Foundation Data Loading process fails. Clicking on the hyperlink in the notification will take you to the Data Loading Status screen to review the details of the process that failed. Notifications are not raised if these actions are successful.

- Download Failed
- Upload Failed

Item Induction

One of the following notifications is raised for item downloads and uploads based on the action you've taken and whether it was successful or resulted in errors. Clicking on the hyperlink for this notification will take you to the Data Loading Status screen to review the details of the specific process that resulted in the notification.

- Download Complete (note: only raised when download occurs in the background based on large files size)
- Download Failed
- Upload Complete
- Upload Failed

New Item Location

One of the following notifications is raised for the item/location ranging process when it is executed in the background. Clicking on the hyperlink for this notification will take you to the Item Location screen for the item that resulted in the notification being raised.

- Processing Complete
- Processing Failed

PO Induction

One of the following notifications is raised for PO downloads and uploads based on the action you've taken and whether it was successful or resulted in errors. Clicking on the hyperlink for this notification will take you to the Data Loading Status screen to review the details of the specific process that resulted in the notification.

- Upload Complete
- Upload Failed
- Download Complete (note: only raised when download occurs in the background based on large files size)
- Download Failed

Purchase Order Rejected

This is raised if you previously submitted a purchase order for approval and the approver has rejected it back to a worksheet status, rather than approving the order. Clicking on the hyperlink for this notification will take you to the purchase order in order to take action.

GL Mapping Failure

This notification is raised if any unmapped transactions are found when posting transactions to the General Ledger. Clicking on the hyperlink for this notification will take you to the Download Foundation Data screen where you can download the GL cross reference information to define mappings for those unmapped transactions.

Replenishment Attribute Induction

One of the following notifications is raised for replenishment attribute downloads and uploads based on the action you've taken and whether it was successful or resulted in errors. Clicking on the hyperlink for this notification will take you to the Data Loading Status screen to review the details of the specific process that resulted in the notification.

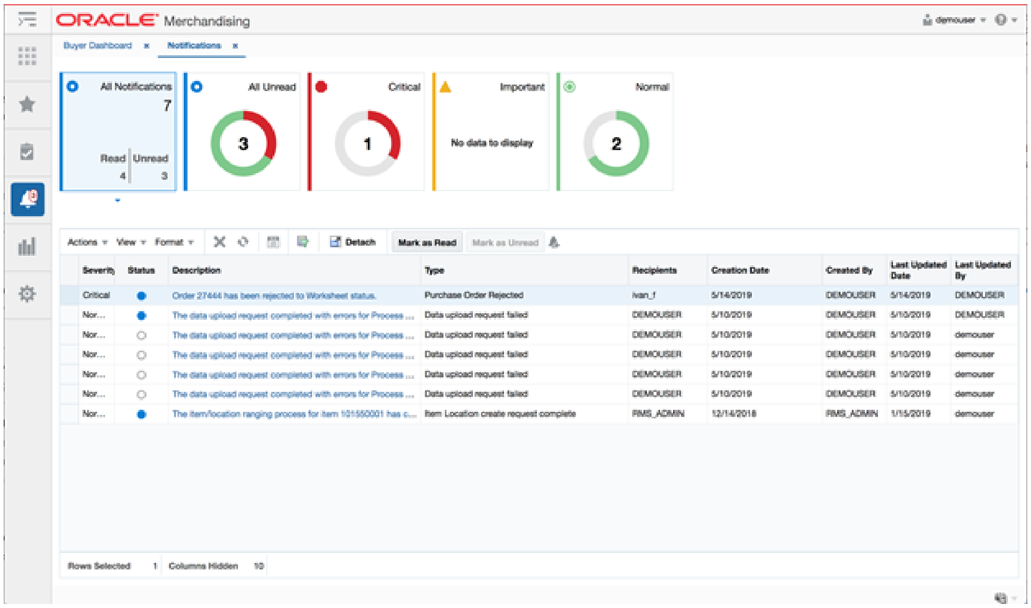
- Download Complete (note: only raised when download occurs in the background based on large files size)
- Download Failed
- Upload Complete
- Upload Failed

Transfer Rejected

This is raised if you previously submitted a transfer for approval and the approver has rejected it back to a worksheet status, rather than approving the transfer. Clicking on the hyperlink for this notification will take you to the transfer in order to take action.

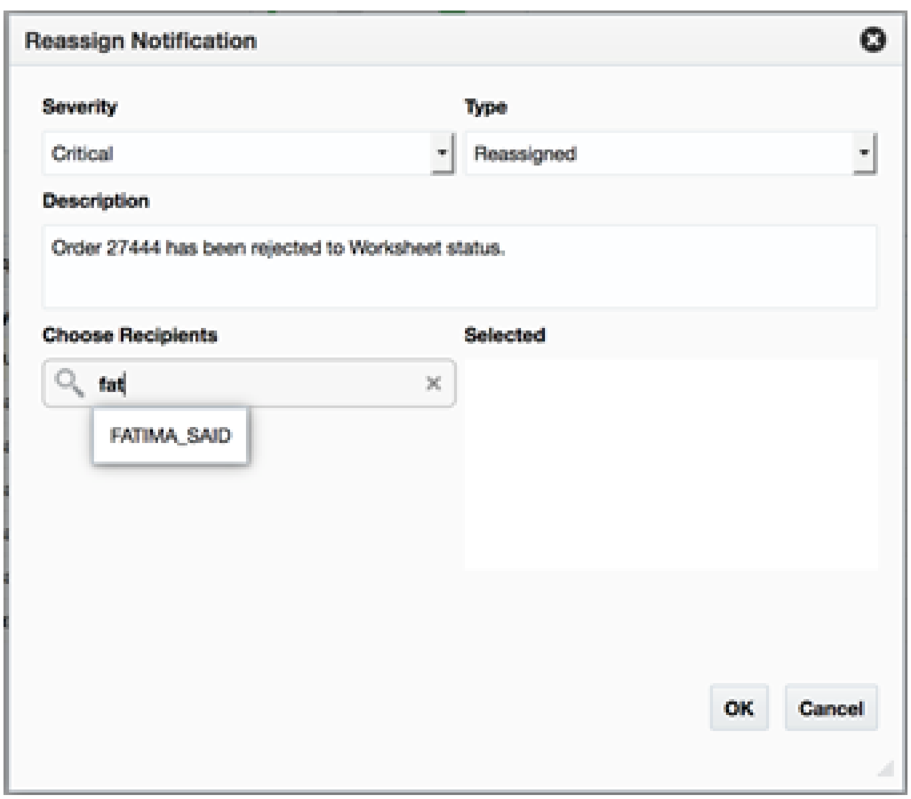
Managing Notifications

Clicking the See All option at the bottom of the notification pane will take you to a page where you can manage all your notifications, including those you previously reviewed. The actions that can be taken in this page include marking notifications read or unread, deleting old notifications, and reassigning notifications to another user. You can also use the hyperlinked description in this screen to access the page where action can be taken based on this notification.



Reassign a Notification

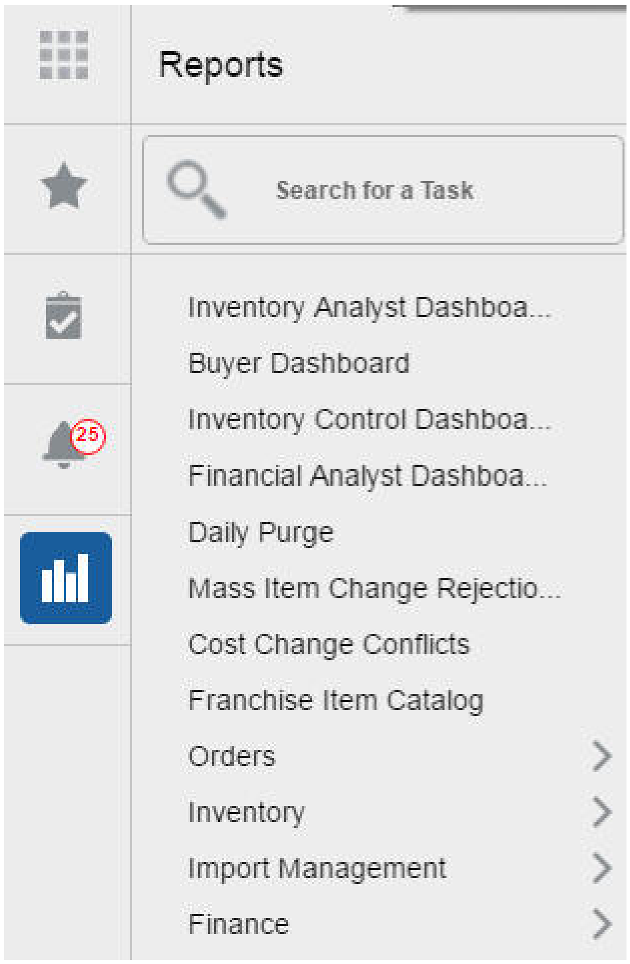
To re-assign a notification, highlight the appropriate notification and select Reassign Notification from the Actions menu. This will display the Reassign Notification popup. Choose one or more recipients that should receive the re-assigned notification and then click OK when all have been added. As part of the reassignment, you can also change the severity of the notification that will be sent to the recipients and the type and description that will be shown to the new recipients.



Reports

The Reports option in the Task Bar shows you a list of the reports or dashboards to which you have access. Clicking on the link for a report will open the page for that report, similar to clicking on tasks in the Tasks menu.

Figure 2-6 Reports Menu



Page Level

The page level actions display the icons and buttons applicable for a particular task flow's page. This section lists the common page level actions that are used throughout Merchandising.

Figure 2-7 Page Level Action - Icons and Buttons

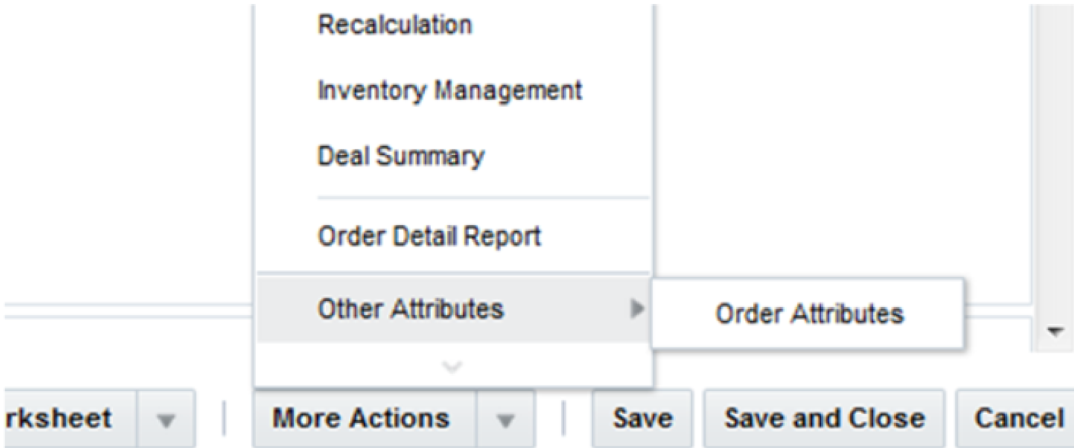
Table 2-1 Screen Level Action - Icons/Buttons and Descriptions

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 page by clicking the Expand and Collapse icon.
Delete icon 	You can delete an entity by selecting the Delete icon.
Status Action Button	Depending on the status of an entity, this button will be available to change the status of an entity. The status will be changed to the label specified on the button, when the button is clicked. 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.
Revert 	Click the Revert iconic button to reject any changes made in the page and reset it to create or edit another entity.
More Actions	The More Actions button will have any additional actions and options for navigating to other pages.
Save	Click **Save** to save any changes made in the page.
Save and Close	Click **Save and Close** to save any changes and exit the page.
Save and Edit Another	Click **Save and Edit Another** to save any changes and edit another entity.
Cancel	Click **Cancel** to reject any changes and exit the page.

Other Attributes

In some pages, under the More Actions menu, there may be an additional menu option titled "Other Attributes". This indicates that custom flex attributes have been enabled for that functional area, such as the example below in the Order page. The sub-menus that are available under the Other Attributes option will vary by functional area, as configured for your business. Depending on how these attributes have been configured, they may be required to be entered in order to save or approve the entity where they exist.

Figure 2-8 Other Attributes Menu



When one of these sub-menu options are selected, a page will open, titled Other Attributes, which will show one or more groupings of attributes associated with the entity, as defined for your business. Below is an example of what the Other Attributes page might look like for attributes associated with a Purchase Order.

Figure 2-9 Other Attributes Page

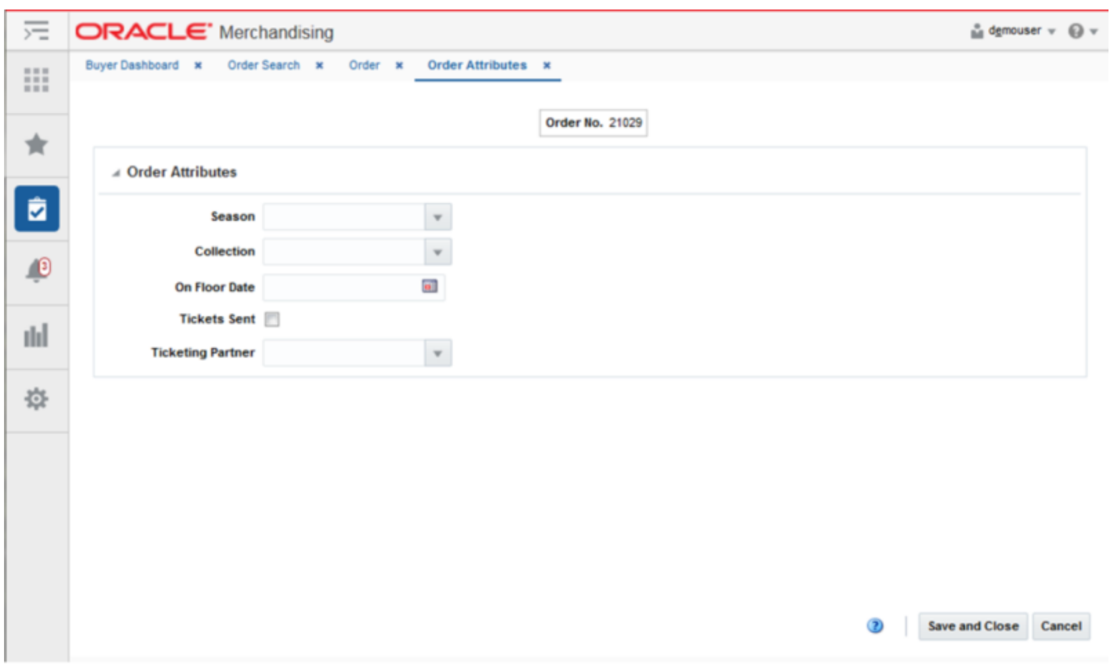


Table Level

> **Note:**
>
> Figure 2-10, Figure 2-11, Figure 2-12 are representations and may differ slightly depending on the page, table, or pop up you are viewing.

At the table level, there are two menus - Action and View - and several icons used for quick actions on the 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, or export the table contents to the spreadsheet.

The actions and icons described here are those used commonly throughout the solution. Some pages may provide additional options, based on the functionality of the page. The details on those more unique options can be found in the documentation for that particular page.

Figure 2-10 Actions Menu and Icons

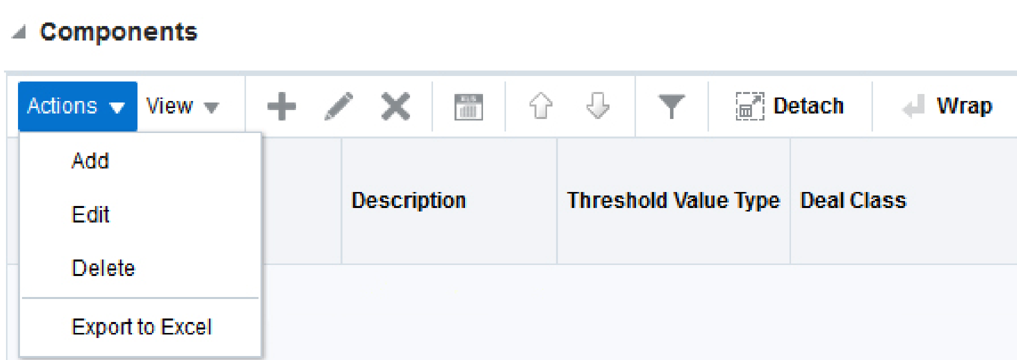


Table 2-2 Actions Menu/Icons and Descriptions of Components Section

Actions Menu/Icon	Description
Add and Add icon	You can add a record to the table by clicking **Add** from the Actions menu or by clicking the Add icon .
Create and Create icon	You can create a record in the table by clicking **Create** from the Actions menu or by clicking the Create icon .

Table 2-2 (Cont.) Actions Menu/Icons and Descriptions of Components Section

Actions Menu/Icon	Description
Create from Existing icon	You can create from an existing record by clicking **Create from Existing** from the Actions menu or by clicking the Create from Existing icon .
Edit and Edit icon	You can edit a record in the table by clicking **Edit** from the Actions menu or by clicking the Edit icon .
Delete and Delete icon	You can delete a record in the table, by clicking **Delete** from the Actions menu or by clicking the Delete icon .
Export to Excel icon	You can copy the contents of 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 .
Move Up and Down icon	You can move the selected row up or down in the table by clicking the Move Up and Down icons .
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 2-11 View Menu

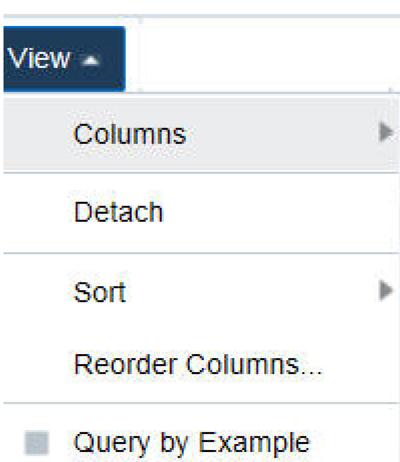


Table 2-3 View Menu and Descriptions

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 page 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 deal components by one of multiple column values by clicking the Query by Example option or by clicking the query by example icon .

Search Screens

You can search for a particular entity by entering or selecting criteria using the search screens. Searches can be done using basic criteria, or can be done in advanced mode, which allows additional criteria to be added, as well as the use of operators (e.g. greater than, less than) in searches. Searches are generally accessed for most entities under the "Manage" actions in the task list.

Search Using Basic Criteria

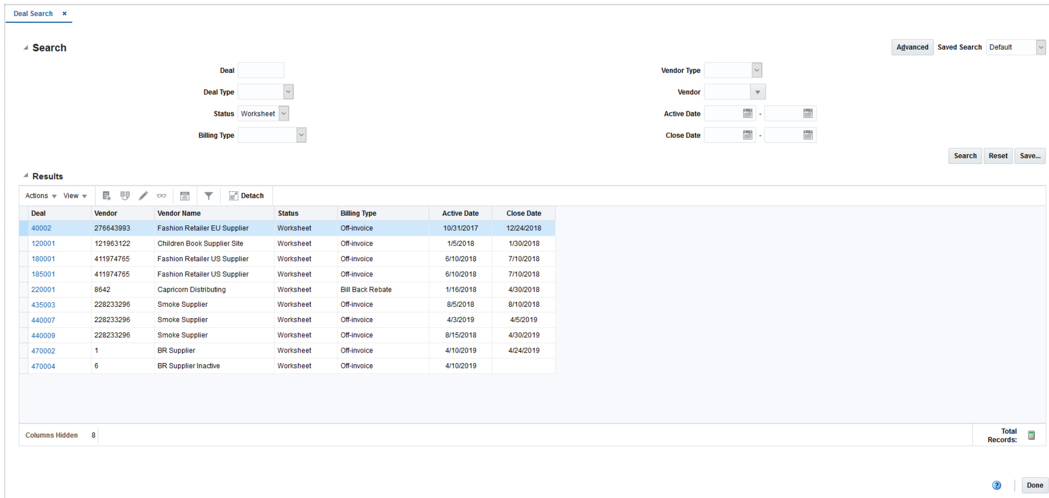
The default view when you open a search page will be for a basic search. The criteria available will differ slightly depending on the entity you are searching in.

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

Figure 2-12 Search Section in Basic Search Mode

2. Click **Search**. The entities that match the search criteria are displayed in the Results section.

Figure 2-13 Search Results



3. From the Search Results, you can manipulate the data using the selections from the Actions menu or selecting one of the table level buttons.

> **Note:**
>
> If there is no saved search selected in the dropdown, Reset clears the Search section, or resets to a saved search, if applicable.

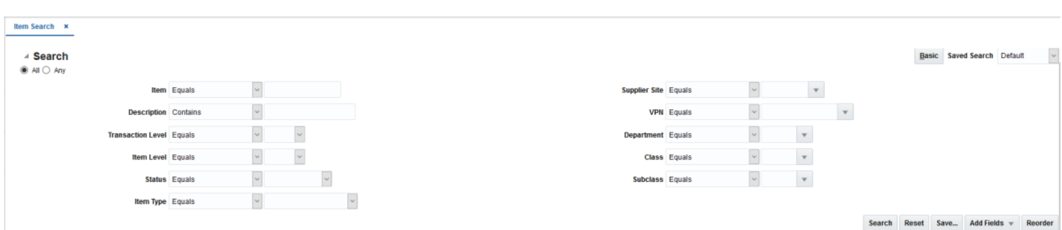
4. Click **Done** to close the page.

Search Using Advanced Criteria

The Advanced Search feature allows you to add new criteria that are not part of basic search, define operators to use in the search, or add multiples of a specific criterion. For example, if searching for an item, using advanced criteria allows you to search on items that are in worksheet or submitted status, by adding the status criterion a second time in the search. Perform the following procedure to define a search using the advanced search criteria:

1. From a Basic Search page, click the Advanced button in the upper right corner of the screen. This will change the label on the button to Basic, which will allow you to revert back to Basic mode, if needed.
2. From the Advanced Search page, you can define the variables around how each search is performed.

Figure 2-14 Advanced Search Page



- The All or Any radio buttons allow you to define what items are returned in the search. Select All to return only those results that meet all the search criteria. Select Any to return those results that meet any of the search criteria.
- The search field operators allow you to define how each field searches for results.

> **Note:**
>
> The options available for the operators will differ based on the type of attribute and in some cases may not be available.

Table 2-4 Search Field Operators

Operator	Description
Starts with	The search results start with the specified character(s).
Ends with	The search results end with the specified character(s).
Equals	The search results match the specified characters exactly.
Does not equal	The search results do not match the specified characters.
Less than	The search results returned are less than the search amount.
Less than or equal to	The search results returned are less than or equal to the search amount.
Greater than	The search results returned are greater than the search amount.
Greater than or equal to	The search results returned are greater than or equal to the search amount.
Between	The search results returned are between the two specified criteria.
Not between	The search results returned are not between the two specified criteria.
Contains	The search results contain the specified character(s).
Does not contain	The search results do not contain the specified character(s).
Is blank	The search results are blank.
Is not blank	The search results are not blank.

3. Many of the Advanced Search pages allow you to add additional fields from which to search. This is also the method by which a second instance of a particular criterion can be added. Alternately, some search pages will automatically display all additional criteria that can be used in advanced search.
   a. From the Advanced Search page, click the **Add Fields** button.

Figure 2-15 Add Fields List

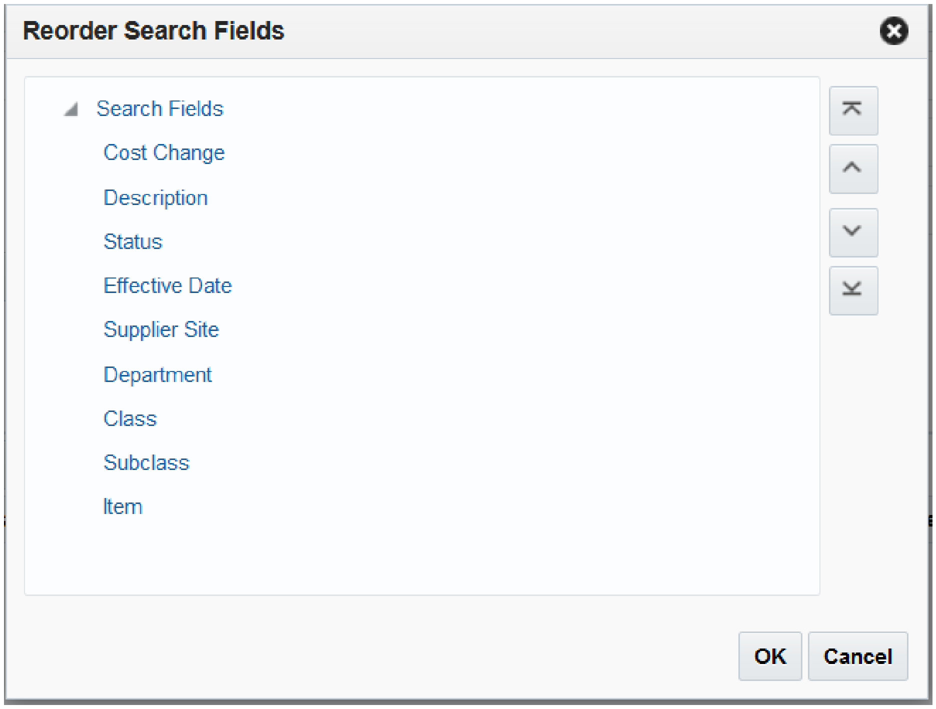
b. From the Add Fields list, click the field that you want to include.

c. Repeat these steps for each additional field you want to add. Only one additional field can be added at a time.

4. Use the Reorder button to customize the order in which the search criteria appear.

   a. From the Advanced Search page, click the Reorder button. The Reorder Search Fields pop-up appears.

Figure 2-16 Reorder Search Fields Pop-up

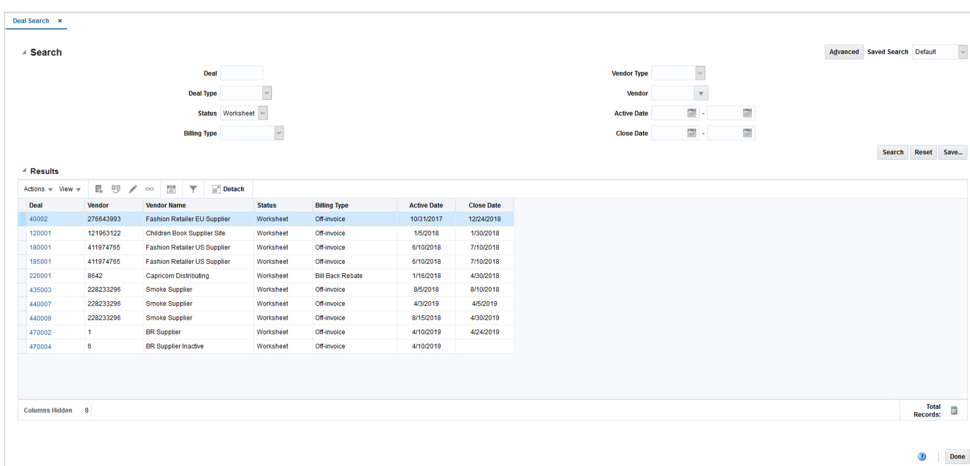


b. Select the search criteria you want to reorder and use the arrow buttons to move the field up or down the list.

c. Click **OK** to save your changes and return to the Advanced Search page.

5. Click **Search**. The entities that match the search criteria are displayed in the Results section.

Figure 2-17 Search Results



6. From the Search Results, you can manipulate the data using the selections from the Actions menu or selecting one of the table level buttons.

Note:

If there is no saved search selected in the dropdown, Reset clears the Search section, or resets to a saved search, if applicable.

7. Click **Done** to close the page.

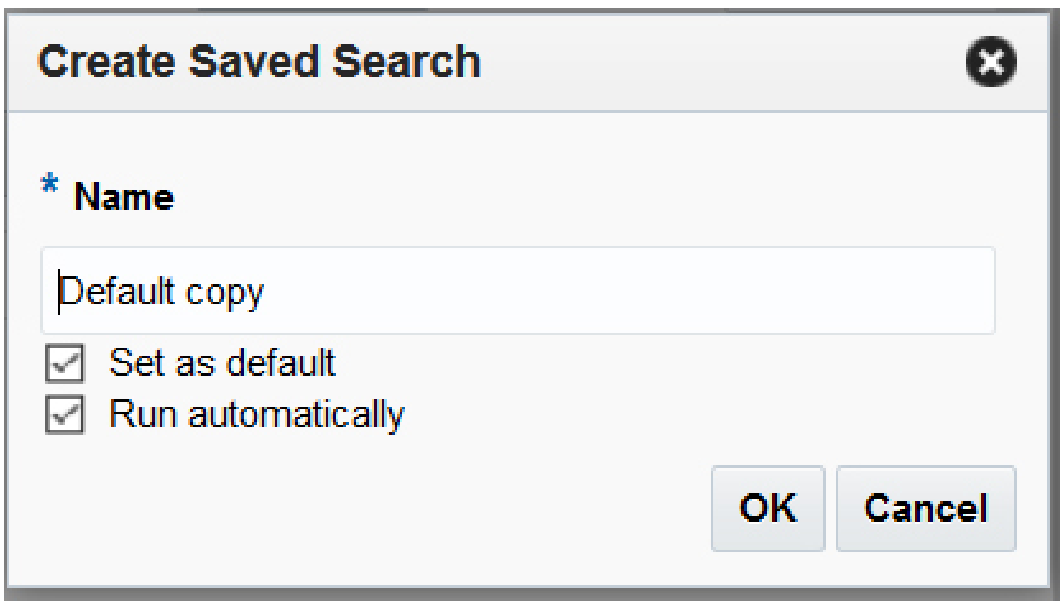
Create a Saved Search

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 pop-up where the search is given a name and the user determines whether it should be the default search, which indicates it should be the one displayed when the page is initially opened, as well as whether it should be run automatically.

To view the created saved search, first enter your desired criteria in either basic or advanced mode. Then, follow these steps:

1. Click the **Save...** button. The Create Saved Search pop-up appears.

Figure 2-18 Create Saved Search

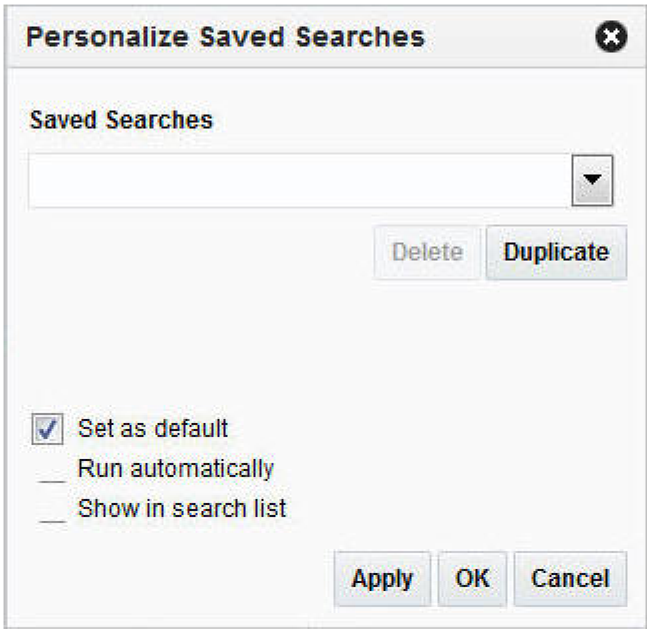


2. Enter the name of the search.
3. You can also choose to save the combination of the search criteria by selecting the following check boxes:
   - Set as default
   - Run automatically
4. Click **OK** to save your search. Click **Cancel** to close the pop-up without saving.

Manage Saved Searches

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

Figure 2-19 Personalize Saved Searches

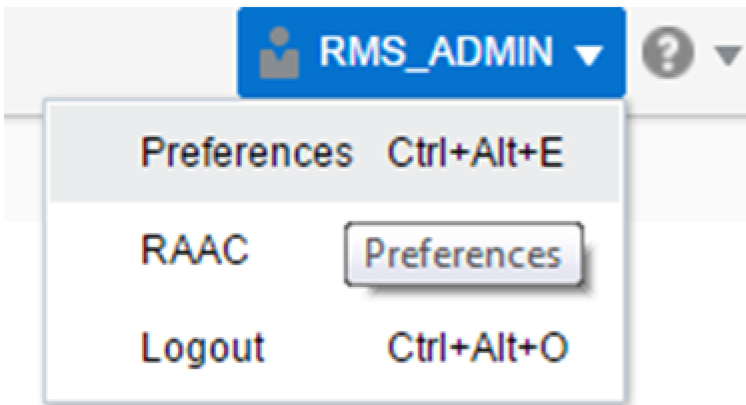


3 Set User Preferences

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

To set your preferences, select Preferences from the user menu at the top of the Merchandising home page. The Preferences page appears.

Figure 3-1 Logged-in User Menu



The standard preference options available are as follows:

- Regional
- Language
- Accessibility

To return to the Merchandising home page, click **Back to Home** at the top of the page.

Regional Options

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

Table 3-1 Regional Options

Value	Description
Territory	Specify the country details.
Date Format	Select the date format that you want to use.

Table 3-1 (Cont.) Regional Options

Value	Description
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.

After applying changes, click **Save** to retain your updates or Revert to revert back to the system defaults.

Language Options

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

Table 3-2 Language Options

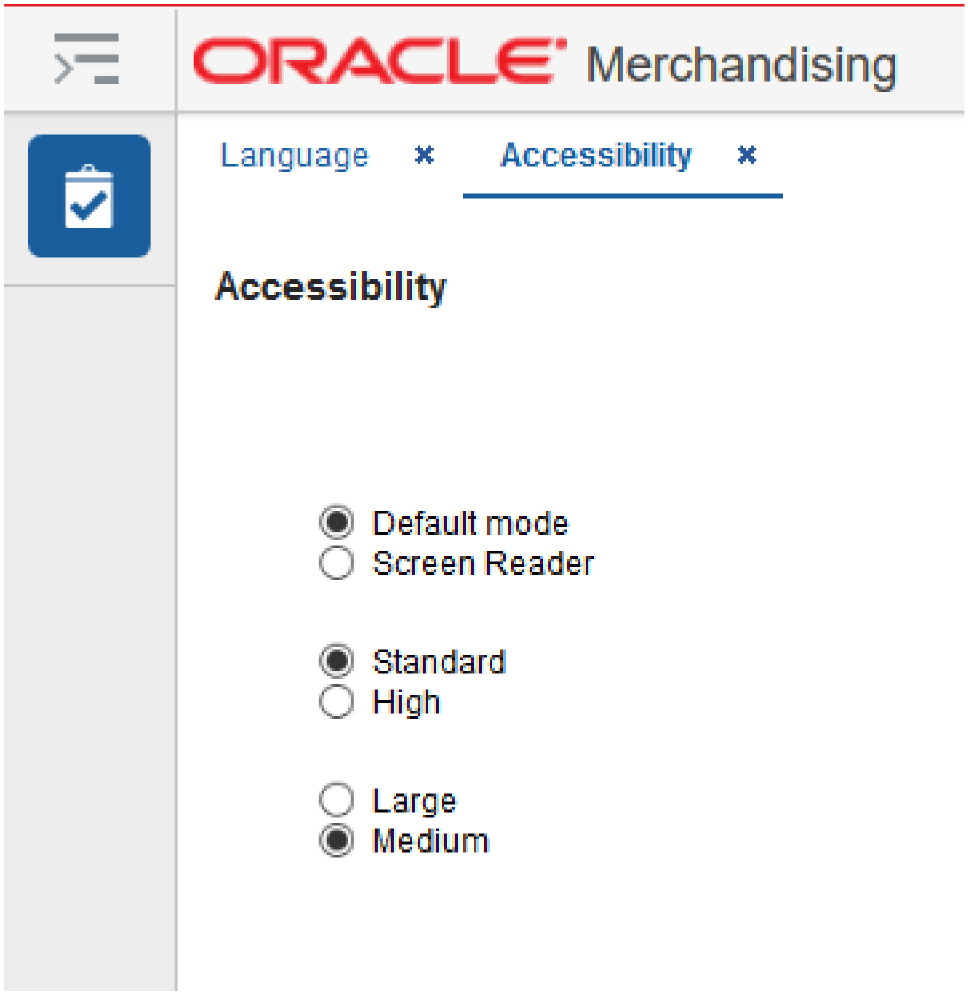
Value	Description
Default	Specify the default language you want to use.
Current Session	Specify the language you want to use for the current session.

After applying changes, click **Save** to retain your updates or Revert to revert back to the system defaults.

Accessibility Options

Merchandising provides the ability for users to switch between accessibility support levels in the application, if required. This is done in the Accessibility Option page, where preferences for using a screen reader, as well as desired contrast and font size, can be configured.

Figure 3-2 Accessibility Tab



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 which will allow the user to operate in that mode.

After applying changes, click **Save** to retain your updates or Revert to revert back to the system defaults.

Use a Screen Reader

The first two options on the page allow you to configure whether or not a screen reader will be used. The two options are:

- Default Mode: this is the setting that should be selected if you are not using a screen reader. By default, Merchandising has a rich user interface interaction, and is also accessible through the keyboard. However, for visually impaired users, it is recommended to use Screen Reader mode.
- Screen Reader: this mode facilitates the display for visually impaired users, but will degrade the display for sighted users without visual impairment.

Set Contrast and Font Size

Additional configurations can be made for contrast and font size in the remaining groups of settings on this page:

- **Contrast:** Merchandising can display content in **standard** or **high-contrast** mode. By default, standard mode is selected. High-contrast mode is intended to make the solutions compatible with operating systems or browsers that have high-contrast features enabled. For example, the use of background images and background colors is changed in high-contrast mode to prevent the loss of visual information. Note that the Merchandising high-contrast mode is more beneficial if used in conjunction with your browser's or operating system's high-contrast mode.
- **Font Size:** the font size displayed in Merchandising is also configurable by choosing either **large** or **medium** modes. Medium mode is the default. In medium 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, it is recommended that you disable large-font mode.

4
Translate Data

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

- for a single entity at a time
- by viewing all entities that have translatable values and translate them in a centralized page.

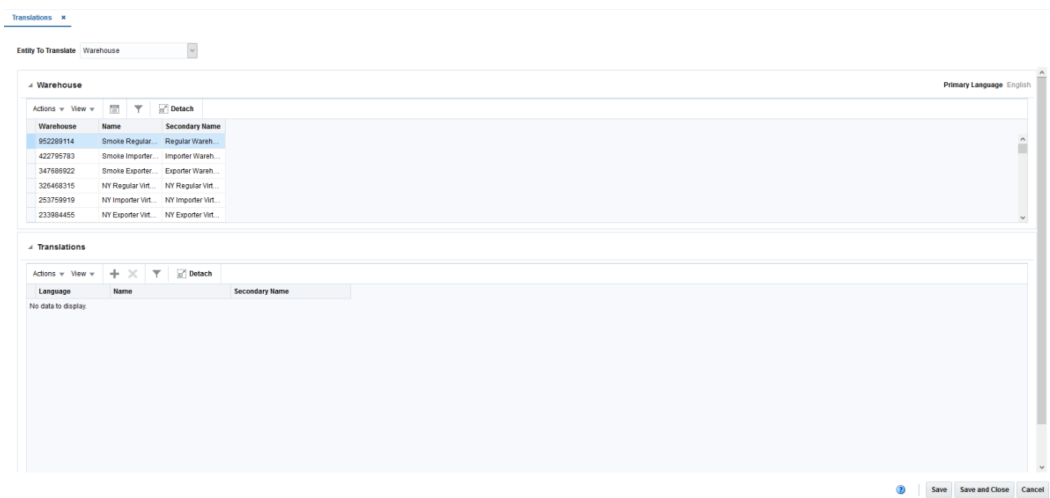
Translate Multiple Entities

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

Perform the following procedure to translate an entity:

1. From the Tasks menu, select Application Administration > Translations. The Translations page appears.

Figure 4-1 Translations Page



Depending on the entity to translate you have selected in the header, the title of the search results 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.

Translations

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

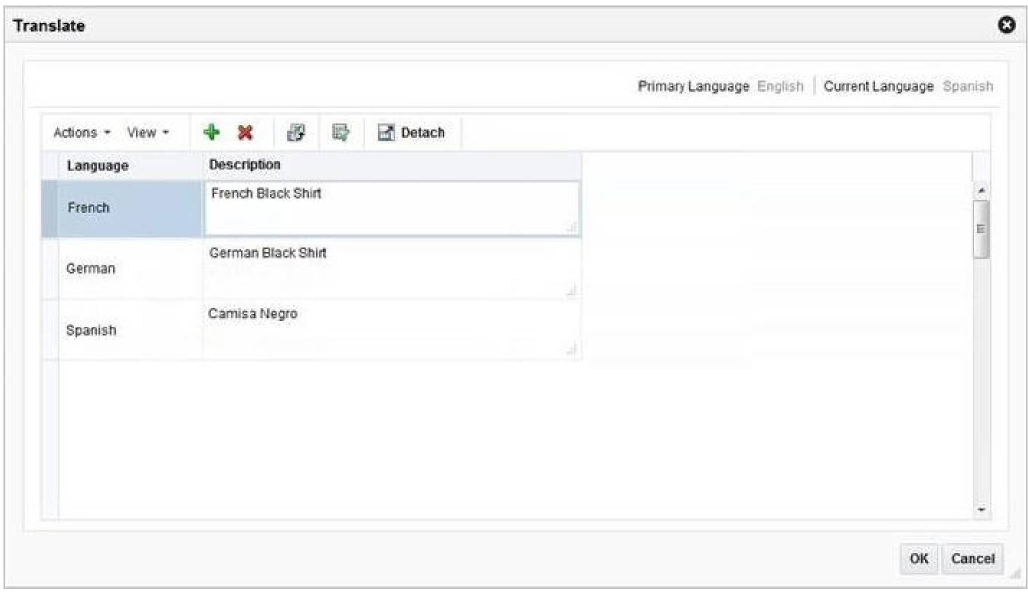
Use the Actions Menu and icons to apply actions to the table. In addition to editing existing translations, you can add new translations or delete existing translations. For more information about how to add translations, see the Add a Translation section.

Translate a Single Entity

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

There are two scenarios you may encounter when translating a single entity:

Figure 4-2   Translate page - Single Entity

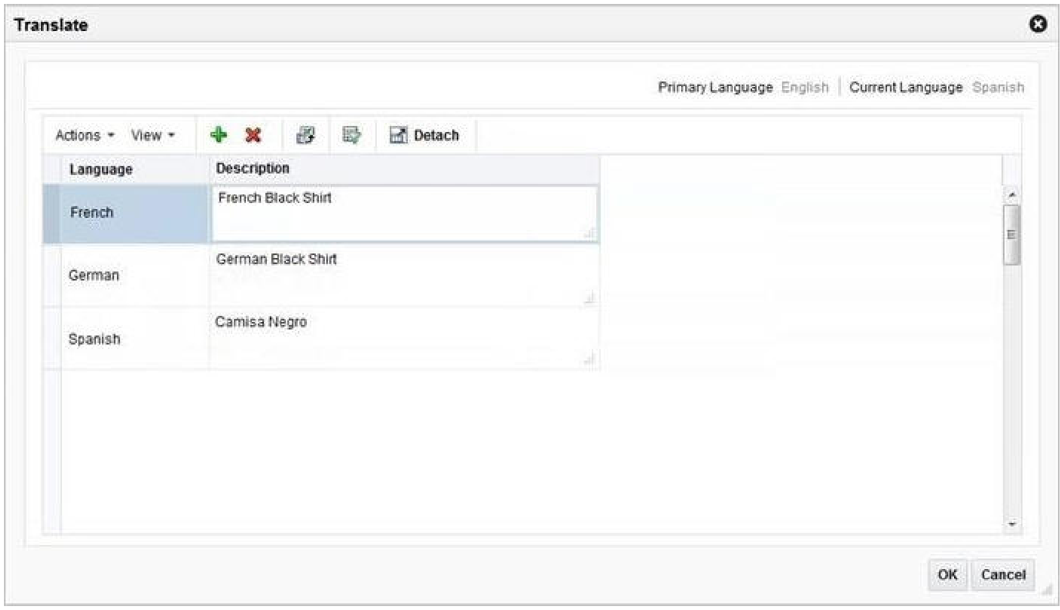


Add a Translation

To add a translation, follow the steps below.

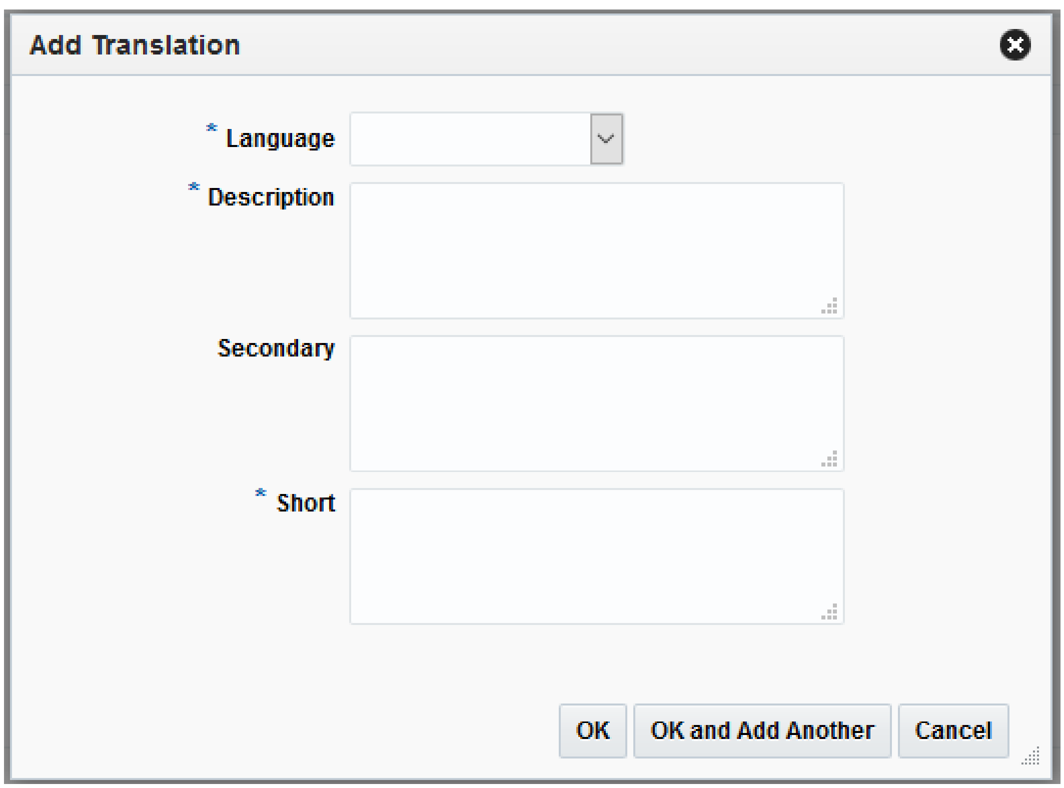
1. Select **Actions > Translate** or use the Translate icon , if available. The Translate page appears.

Figure 4-3   Translate Page - Single Entity



2. In the table, select **Actions > Add**, or use the Add icon . The Add Translation pop-up appears.

Figure 4-4   Add Translation



3. In the **Language** field, select the desired language from the list. This field is a required field.

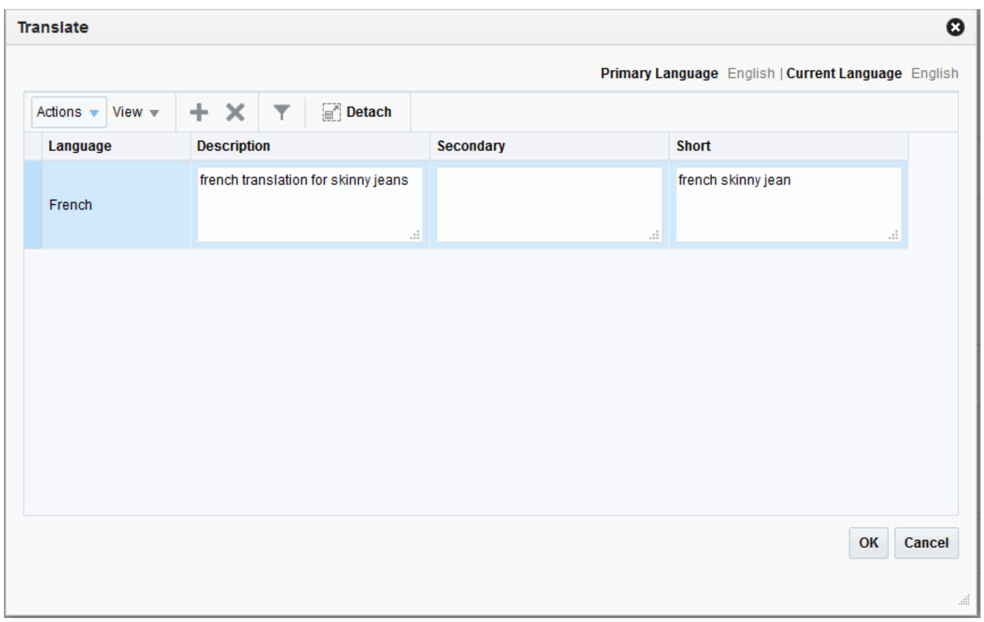
4. In the **Description** field, enter the desired translation. This field is a required field. Depending on the entity being translated, there may be more than one translation field that is required to be entered. For example, item descriptions have up to three descriptions that can be translated - the long description, the secondary description, and the short description.
5. Then choose one of the following options.
   - Click **OK** to add the translation to the table and close the page.
   - Click **OK and Add Another** to add additional translations.
   - Click **Cancel** to reject all entries and close the page.

Edit a Translation

To edit a translation, follow the steps below.

1. Select **Actions > Translate** or use the Translate icon , if available. The Translate page appears.

Figure 4-5 Edit a Translation



2. Edit the description directly in the table (the fields are in-line editable).

> **Note:**
>
> The Language field cannot be edited. If a desired language is no longer wanted, the row should be deleted and a new row added for the desired language.

3. Click **OK** to update the translation and close the page.

5

Download/Upload Data from Spreadsheets

Several data entities in the Oracle Retail Merchandising Suite allow for management of data via spreadsheets. This section describes how to download data for editing and how to upload the changes you've made. Specifics on the entities that can be edited using this functionality can be found in other Use sections by functional area.

Download Data

The Download Data page allows you to download certain data entities into a spreadsheet for viewing or editing.

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

Figure 5-1 Download Data page

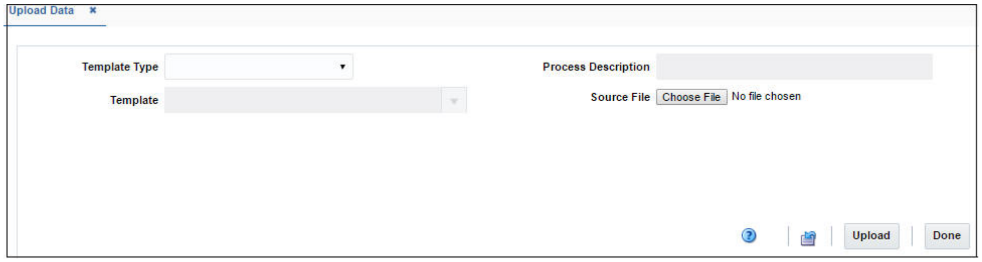
2. In the **Template Type** field, select the template type from the list.
3. In the **Template** field, enter, select or search for the template you want to download.
4. Then choose one of the following options:
   - Click **Download** to download the file. When you click Download, you are prompted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

Upload Data

The Upload Data page allows you to upload a spreadsheet of data that you previously downloaded and apply the updates or additions made in the file.

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

Figure 5-2 Upload Data page



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 select the file.

> **Note:**
>
> The file uploaded must end in .ods and must be in the same format as that which is downloaded in the Download Data page. It is recommended you always start with downloading the data first and then make changes in that file to ensure you have the correct format. If any columns or tabs in the spreadsheet template are removed, errors will occur on uploading.

6. Then choose one of the following options:
   - Click **Upload** to upload the file. The upload processing will occur in the background. If an error occurs during the processing, a notification will be displayed with a link to view the details. Alternatively, you can access the Data Loading Status page to check the status of the upload.
   - Click **Revert** to clear out the screen inputs.
7. Click **Done** to close the Upload Data page.

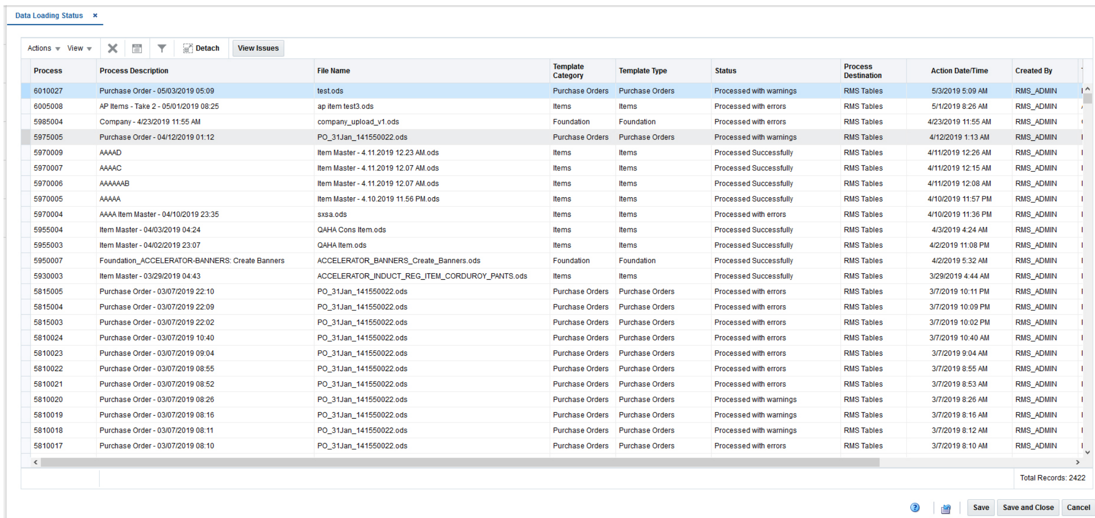
6
View Data Loading Status

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

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

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

Figure 6-1   Data Loading Status Page



Process	Process Description	File Name	Template Category	Template Type	Status	Process Destination	Action Date/Time	Created By
6010027	Purchase Order - 05/03/2019 05:09	test.ods	Purchase Orders	Purchase Orders	Processed with warnings	RMS Tables	5/3/2019 5:09 AM	RMS_ADMIN
6005008	AP Items - Take 2 - 05/01/2019 08:25	ap item test3.ods	Items	Items	Processed with errors	RMS Tables	5/1/2019 8:26 AM	RMS_ADMIN
5985004	Company - 4/23/2019 11:55 AM	company_upload_v1.ods	Foundation	Foundation	Processed with errors	RMS Tables	4/23/2019 11:55 AM	RMS_ADMIN
5975005	Purchase Order - 04/12/2019 01:12	PO_31Jan_141550022.ods	Purchase Orders	Purchase Orders	Processed with warnings	RMS Tables	4/12/2019 1:13 AM	RMS_ADMIN
5970009	AAAAD	Item Master - 4.11.2019 12.23 AM.ods	Items	Items	Processed Successfully	RMS Tables	4/11/2019 12:26 AM	RMS_ADMIN
5970007	AAAAC	Item Master - 4.11.2019 12.07 AM.ods	Items	Items	Processed Successfully	RMS Tables	4/11/2019 12:15 AM	RMS_ADMIN
5970006	AAAAAAB	Item Master - 4.11.2019 12.07 AM.ods	Items	Items	Processed Successfully	RMS Tables	4/11/2019 12:08 AM	RMS_ADMIN
5970005	AAAAA	Item Master - 4.10.2019 11.56 PM.ods	Items	Items	Processed Successfully	RMS Tables	4/10/2019 11:57 PM	RMS_ADMIN
5970004	AAAA Item Master - 04/10/2019 23:35	sxsa.ods	Items	Items	Processed with errors	RMS Tables	4/10/2019 11:36 PM	RMS_ADMIN
5955004	Item Master - 04/03/2019 04:24	QAHA Cons Item.ods	Items	Items	Processed Successfully	RMS Tables	4/3/2019 4:24 AM	RMS_ADMIN
5955003	Item Master - 04/02/2019 23:07	QAHA Item.ods	Items	Items	Processed Successfully	RMS Tables	4/2/2019 11:08 PM	RMS_ADMIN
5950007	Foundation_ACCELERATOR-BANNERS: Create Banners	ACCELERATOR_BANNERS_Create_Banners.ods	Foundation	Foundation	Processed Successfully	RMS Tables	4/2/2019 5:32 AM	RMS_ADMIN
5930003	Item Master - 03/29/2019 04:43	ACCELERATOR_INDUCT_REG_ITEM_CORDUROY_PANTS.ods	Items	Items	Processed Successfully	RMS Tables	3/29/2019 4:44 AM	RMS_ADMIN
5815005	Purchase Order - 03/07/2019 22:10	PO_31Jan_141550022.ods	Purchase Orders	Purchase Orders	Processed with errors	RMS Tables	3/7/2019 10:11 PM	RMS_ADMIN
5815004	Purchase Order - 03/07/2019 22:09	PO_31Jan_141550022.ods	Purchase Orders	Purchase Orders	Processed with errors	RMS Tables	3/7/2019 10:09 PM	RMS_ADMIN
5815003	Purchase Order - 03/07/2019 22:02	PO_31Jan_141550022.ods	Purchase Orders	Purchase Orders	Processed with errors	RMS Tables	3/7/2019 10:02 PM	RMS_ADMIN
5810024	Purchase Order - 03/07/2019 10:40	PO_31Jan_141550022.ods	Purchase Orders	Purchase Orders	Processed with errors	RMS Tables	3/7/2019 10:40 AM	RMS_ADMIN
5810023	Purchase Order - 03/07/2019 09:04	PO_31Jan_141550022.ods	Purchase Orders	Purchase Orders	Processed with errors	RMS Tables	3/7/2019 9:04 AM	RMS_ADMIN
5810022	Purchase Order - 03/07/2019 08:55	PO_31Jan_141550022.ods	Purchase Orders	Purchase Orders	Processed with errors	RMS Tables	3/7/2019 8:55 AM	RMS_ADMIN
5810021	Purchase Order - 03/07/2019 08:52	PO_31Jan_141550022.ods	Purchase Orders	Purchase Orders	Processed with errors	RMS Tables	3/7/2019 8:53 AM	RMS_ADMIN
5810020	Purchase Order - 03/07/2019 08:26	PO_31Jan_141550022.ods	Purchase Orders	Purchase Orders	Processed with warnings	RMS Tables	3/7/2019 8:26 AM	RMS_ADMIN
5810019	Purchase Order - 03/07/2019 08:16	PO_31Jan_141550022.ods	Purchase Orders	Purchase Orders	Processed with warnings	RMS Tables	3/7/2019 8:16 AM	RMS_ADMIN
5810018	Purchase Order - 03/07/2019 08:11	PO_31Jan_141550022.ods	Purchase Orders	Purchase Orders	Processed with warnings	RMS Tables	3/7/2019 8:12 AM	RMS_ADMIN
5810017	Purchase Order - 03/07/2019 08:10	PO_31Jan_141550022.ods	Purchase Orders	Purchase Orders	Processed with errors	RMS Tables	3/7/2019 8:10 AM	RMS_ADMIN

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 6-1 Data Loading Status Table - Actions Menu/Icons and Description

Actions Menu/Icons	Description
Delete and Delete icon	If no errors occurred with the process and data was fully loaded into Merchandising, or if you wish to re-try the load again after errors have been correct, the process can be deleted in the table. 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.
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 page appears. • Click **Done** to close the page.
Upload to RMS	With this option you can upload the selected process from Staging to the Merchandising tables. This option is only enabled for items, cost changes, and purchase orders which were loaded with a destination of Staging Tables and do not hold the status “Processed with Errors".
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.

7 Download Blank Templates

The Download Blank Template page allows you to download blank templates for certain entities which support spreadsheet upload, such as items and purchase orders.

1. You can access the Download Blank Template page from the Task menu, select **Foundation Data > Data Loading > Download Blank Template**. The Download Blank Template page appears.
2. In the **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. When you click Download, you are prompted to either open or save the .ods file.
   - Click **Revert** to undo any changes.
5. Click **Done** to close the Download Blank Template Data page.

8
Attachments

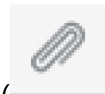
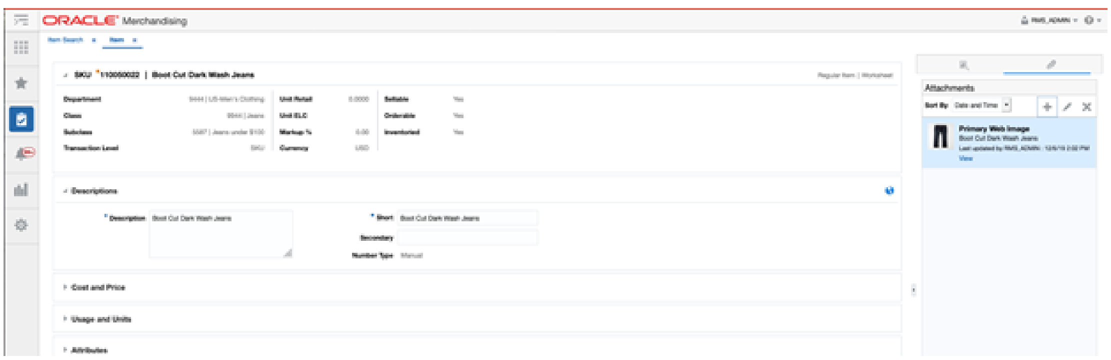
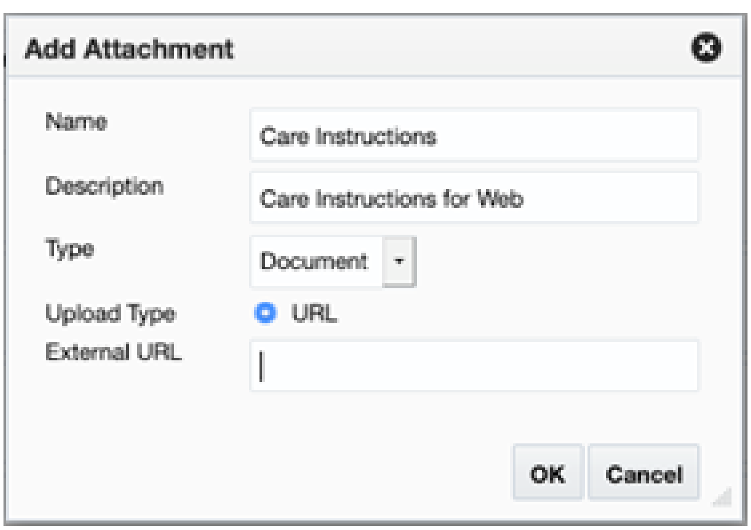
In certain entities in Merchandising, there is an option to add a link to documents, images, or other supplemental information. This provides an easy way for users to access this information that is stored elsewhere in the context of an item or transaction. This linking is done in the Attachment tab in the contextual pane by clicking on the paper clip iconic tab () in the panel, as shown below in the Item screen.

Figure 8-1 Item Screen



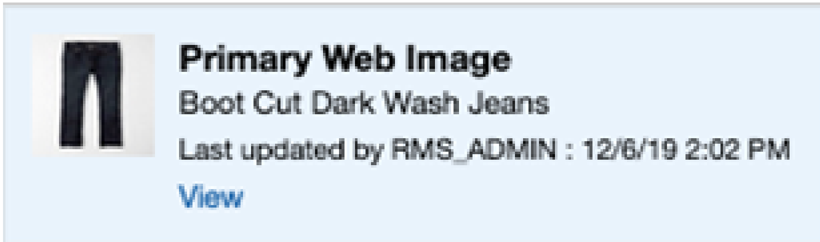
To add an attachment, click on the  iconic button in the attachments panel and fill out all the fields in the pop-up. The URL must be a location that will be accessible to your users.

Figure 8-2 Add Attachment



Once added, a small image of the link is displayed, along with a View hyperlink that will allow you to quickly access the image or document at the location where it is stored.

Figure 8-3   Primary Web Image



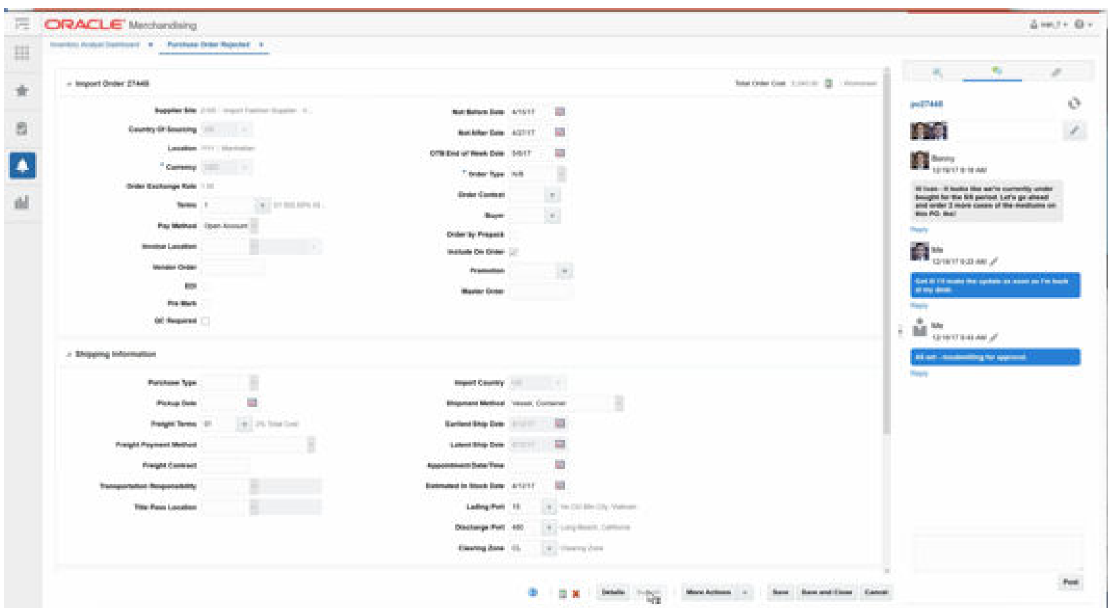
One or more links can be added to each entity. The links can be updated or removed as needed at any time by selecting the  iconic button or the  iconic button, respectively.

9 Conversations

In certain entities in Merchandising, there is an option to integrate with the Slack collaboration tool. When this feature is turned on, the contextual area of an enabled screen shows the related conversations for the entity (e.g., purchase order) being maintained. Click on the conversation tab in the contextual pane

to access the conversation. From here, you can create a new conversation for an entity, view all existing messages for an entity, and post messages and replies. You can also add or remove members from a conversation and view documents that have been uploaded to Slack. Conversations create channels in Slack.

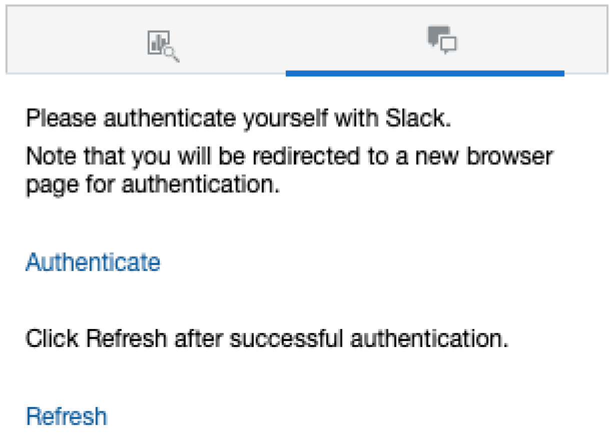
Figure 9-1 Conversations Pane



Log In

To begin using this functionality, you will first need to log into the Slack application that has been configured for Merchandising. To do this, click on the Authenticate link and then enter your Slack username and password. Then, click the Refresh link in Merchandising after authenticating.

Figure 9-2 Login View



Create a Conversation

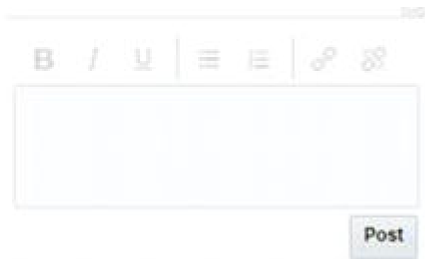
To create a new conversation related to an entity, provide a conversation title and then click Create Conversation. Only one conversation can exist per entity.

Update a Conversation

Once the conversation is created, the collaboration messages panel displays the messages view. This view displays all the messages for the conversation associated with the entity. You can then add messages, add members, share the conversation and so on. Updates to the conversation are shown back in the application tab when you click the Refresh button.

Figure 9-3 Add Users

Figure 9-4 Add Messages



10
Add Items by Upload List

In several areas in Merchandising, in addition to selecting individual items or an item list, you will be provided an option for adding items titled Upload List. This option will allow you to browse for a file of type .csv that contains a column of items. These items will then be applied to the transaction similar to the way an item list is used, but without the need to create an item list in advance. The .csv file does not require a template like other spreadsheet upload processes, but instead uses just the data in the first column (all other data is ignored) of the first tab. The upload also assumes that there is no header for the column.

All items that are valid for the transaction type can be included in the upload. For example, if using to add items to an item list, either parent items or transaction items can be included.

Figure 10-1 Add Items