Oracle® Retail Merchandising Cloud Services

Customization and Extension Guide

Release 23.1.401.0
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Oracle Retail Merchandising Cloud Services Customization and Extension Guide, Release 23.1.401.0

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Oracle® Merchandising Customization and Extension Guide

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Preface

The *Oracle® Merchandising Customization and Extension Guide* contains the requirements and procedures that are necessary for the retailer to extend and customize the Merchandising applications.

Audience

This Customization and Extension Guide is for administrators of the Oracle Retail Merchandising System. This includes merchandisers, buyers, business analysts, and administrative personnel.

- System administrators
- Operations personnel
- Integrators and implementation staff personnel

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`http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html`

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Oracle Retail product documentation is also available on the following Web site:

`https://docs.oracle.com/en/industries/retail/index.html`

(Data Model documents can be obtained through My Oracle Support.)

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the window, or text that you enter.

1 Overview

This document provides an overview of tools and options provided in the Merchandising Cloud Service suite for customizing or configuring the solutions to meet your business. The solutions covered in the scope of this document include:

Functional Name	Cloud Service
Merchandising	Oracle Retail Merchandising Foundation Cloud Service - Merchandising module
Sales Audit	Oracle Retail Merchandising Foundation Cloud Service - Sales Audit module
Trade Management	Oracle Retail Merchandising Foundation Cloud Service - Trade Management module
Pricing	Oracle Retail Pricing Cloud Service (RPCS)
Allocation	Oracle Retail Allocation Cloud Service (RACS)
Invoice Matching	Oracle Retail Invoice Matching Cloud Service (ReIMCS)

The Merchandising suite is considered closed source code. This means that the ability to customize or extend the solutions is limited, however the solutions do provide some options. This section will describe how to leverage these capabilities.

Common Use Cases

Some of the most common use cases for customizing or extending the Merchandising solutions are to

- Make additional attributes available in a workflow
- Add custom reports to existing dashboards
- Add a custom dashboard
- Create a bolt-on application to accomplish a certain task

Add Attributes to a Workflow

If you would like visibility to additional attributes to assist your users in decision-making while using the Merchandising solutions, the easiest way to provide this information is to create a small report and display it in the contextual pane of the applicable workflow. This can be used for base attributes, as well as any attributes added using the Custom Flex Attributes functionality or even attribution from an external source. If you want to use base product or flex attributes to display the attributes based on live production data, then you'll need to use BI Publisher to create the report (see "Using BI Publisher for Custom Reports"). If you want to use external data sources, have more complex calculations that are required for your report, or wish to use a different technology, then any URL-based report can be used. Regardless of the technology used, you can follow the Merchandising Style Guide to get a similar look and feel for your report to what is used elsewhere in the applications.

Add Custom Dashboard Reports

Merchandising solutions provide a number of dashboard reports as part of the base solution. The platform allows you to turn base reports off and on, re-order them on a dashboard, or even have them appear on other dashboards. There are also a number of configuration options for the base dashboard reports. The details on configuring the order or adding and removing base reports is described below in the "Dashboards" section. Also in this section, it describes how to configure a custom report in the base dashboards. Dashboard reports can be written in BI Publisher against the live production data, or can use any URL-based report built in BI Publisher (see "Using BI Publisher for Custom Reports") or other technologies that are based on other data sources. Regardless of the technology used, you can follow the Merchandising Style Guide to get a similar look and feel for your report to what is used elsewhere in the applications.

Add a Custom Dashboard

If you have a need to create a new dashboard outside of the base-provided dashboards, this can be created in an external technology and linked into the Reports Menu using the platform configurations. This will make it look to users like the other dashboards. However, it should be noted that when this dashboard is launched, it will result in a new window or tab in the browser being opened.

Create a Bolt-on Application

If your business requires a custom process that cannot be accomplished in the Merchandising screens, you can build a bolt-on application leveraging the Merchandising library of web services and other APIs that allow it to interact with the Merchandising solutions. If you require data that is not available in one of these services or APIs, then because the database and application server cannot be accessed directly, you may also need to use the Retail Data Store (RDS) or the Data Access Schema (DAS) in order to access some of the data.

RDS enables retailers to unlock the value of their data through a comprehensive set of tools, enabling virtually unlimited extensibility while abstracting those workloads from those of the original Oracle Retail cloud services. This toolset allows the retailer to create a wide variety of functionality that they can tailor specifically to their own business processes.

> **Note:**
>
> For more information on using the RDS see the *Retail Data Store Implementation Guide*.

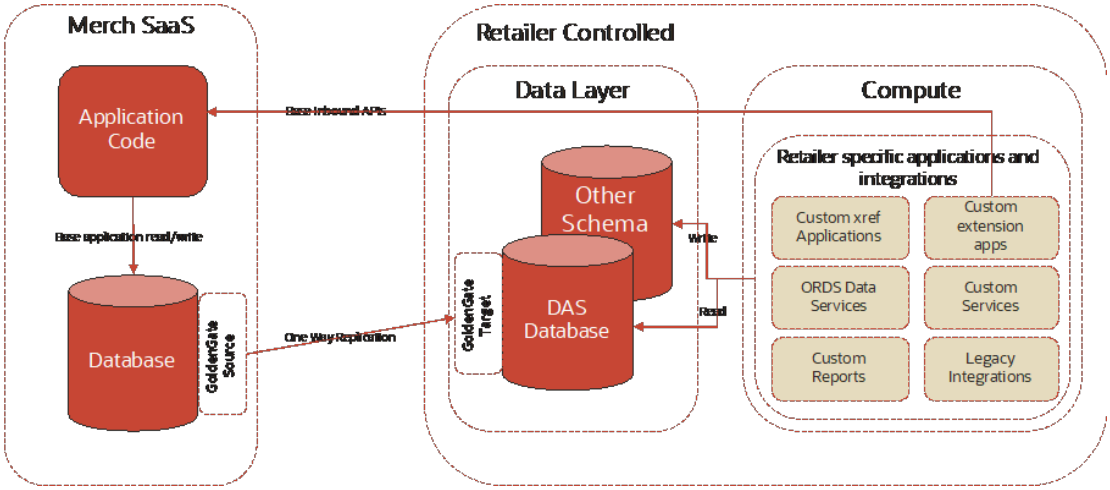
The DAS is a one-way, near real-time replication of data. The target environment would live in an on-premise or PaaS environment, which could also be used to host the custom application.

If you use this as part of your implementation, you can use the data in the read-only replicated data in the target environment to create your own query web services or as

the basis for your custom application. The diagram below shows an example of how this might look.

> **Note:**
>
> For more information on using DAS for custom integration and reporting, see the DAS Developer's Guide on My Oracle Support note 2082126.1.

The following image depicts how a custom extension or report would be created using the DAS. A similar view for the RDS can be found in the “Implementation Overview” section of the *Retail Data Store Implementation Guide*.



This document will show how to leverage the application framework to connect your bolt-on application to the Merchandising solutions for a more seamless experience for your users. Key sections to review for this type of customization are:

- User Interface - Tasks Menu Provides directions on how to add a task to the Tasks menu for user access to the bolt-on workflow.
- In Context Launch Provides options for configuring your custom task flow to launch a Merchandising workflow in-context. For example, providing a link from your workflow into the Merchandising Item workflow for the user to view or edit details on an item.
- Merchandising Style Guide Provides information on some of the key formatting used in Merchandising workflows that could be used in your custom application to give it a similar look and feel.
- UI Platform Services Some of the features, such as Notifications and Favorites, are common across the Merchandising solutions are part of the common platform that the solutions share. You may want utilize some of these features in your custom bolt-on application to complete a workflow or for a common look and feel.
- Batch Schedule Integration If your custom application requires the running of some batch processes that must be coordinated with the Merchandising batch processes, you can leverage the integration with POM (Process Orchestration and Monitoring), the Merchandising cloud service scheduler. For more information on this feature, see the

External System Configuration chapter in the *Oracle Retail Process Orchestration and Monitoring User Guide*.

2
Custom Flex Attributes

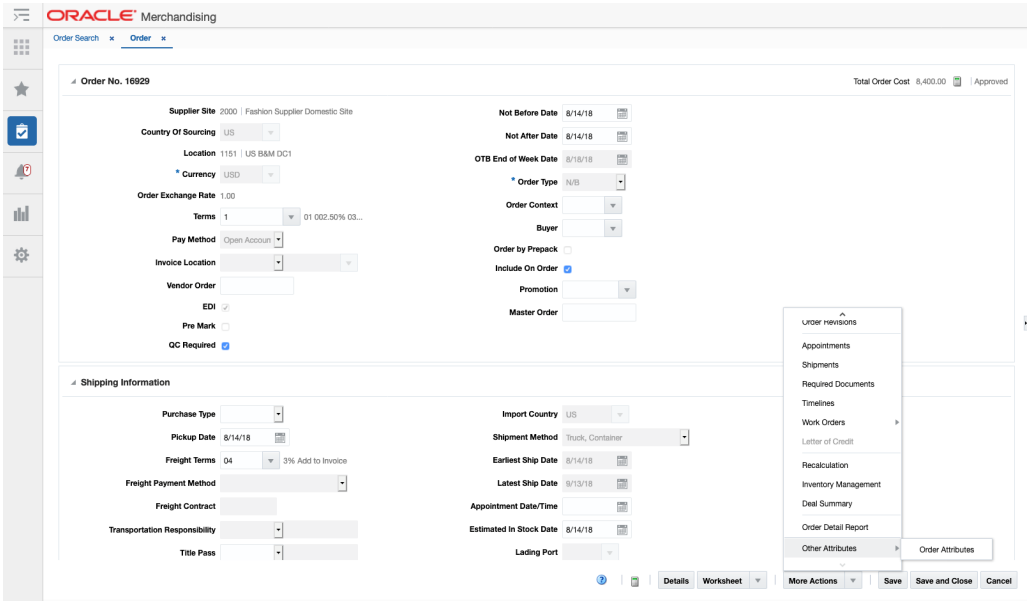
Custom Flex Attribute Solution (CFAS) is a metadata driven framework that enables you to set up additional attributes on pre-enabled Merchandising entities without modifying base code.

The CFAS framework enables you to extend Merchandising entities to account for attributes that you require for your business, such as to support reporting or integration requirements. The entities that support flex attributes are:

Entity	Table Name
Address	ADDR
Class	CLASS
Cost Changes	COST_SUSP_SUP_HEAD
Cost Components	ELC_COMP
Deals	DEAL_HEAD
Department	DEPS
Diff Types	DIFF_TYPE
Item	ITEM_MASTER
Item Location	ITEM_LOC
Item Supplier	ITEM_SUPPLIER
Item Supplier Country	ITEM_SUPP_COUNTRY
Item Supplier Country Location	ITEM_SUPP_COUNTRY_LOC
Promotion Offers	RPM_PROMO_OFFER
Purchase Order	ORDHEAD ORDSKU ORDLOC
Partners	PARTNER
Return to Vendor	RTV_HEAD
Store	STORE
Suppliers	SUPS
Transfers	TSFHEAD
VAT Codes	VAT_CODES
Warehouses (physical and virtual)	WH

Once enabled for an entity, the flex attributes can be accessed using the More Actions menu in the relevant entity screen. The following figure illustrates how the option is displayed to users when attributes have been activated for purchase orders. The label displayed in the More Actions menu, in this case "Order Attributes", is also part of the CFAS configuration. The attribute screens do not have special security associated with them. If a user can edit the main entity screen, they will also be able to edit the flex attributes associated with the entity.

Figure 2-1 Illustration of a CFAS User Interface on Item Maintenance screen



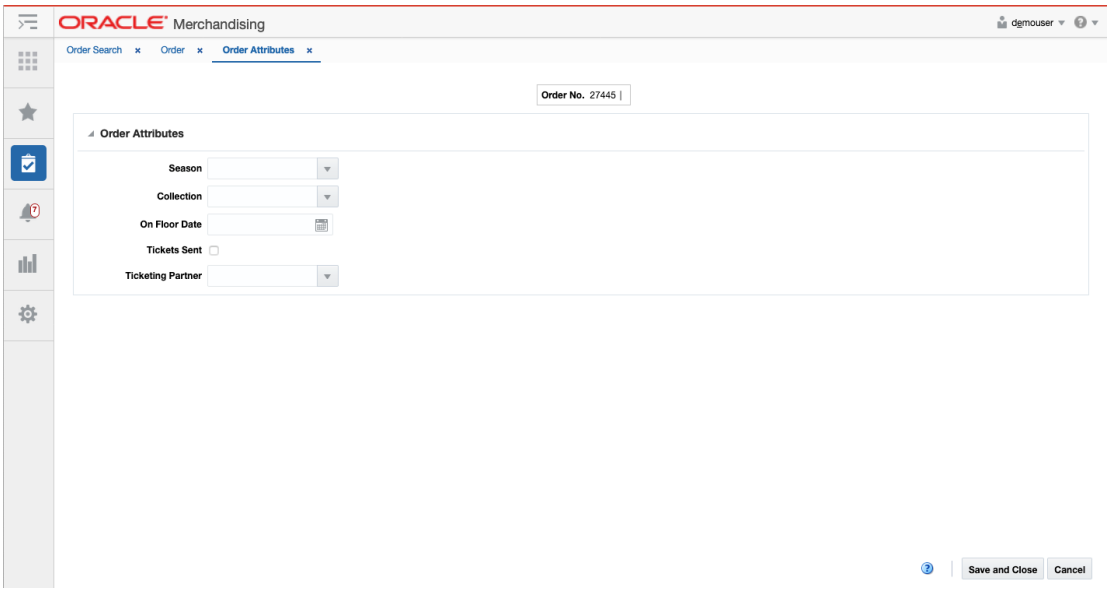
In addition to managing the flex attributes in the Merchandising UI, these attributes can also be included on inbound integration if the source of the information is another application. And they are also published outbound so that they can be communicated to other dependent solutions.

> **Note:**
>
> When an entity record is deleted, the related CFAS attributes associated with that entity will also be deleted.

Defining Custom Flex Attributes

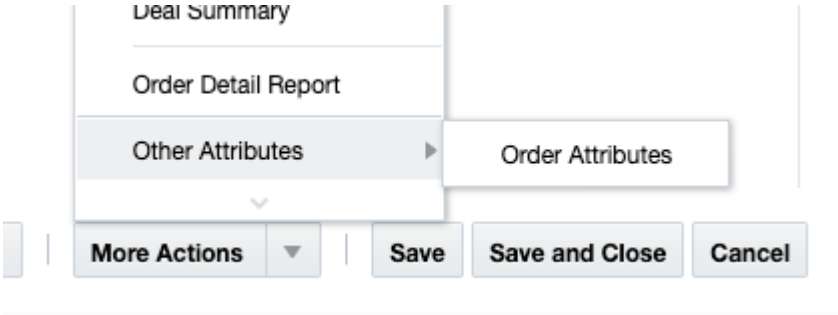
This chapter describes how flex attributes are organized so that you can plan for the best way to use the functionality to support your business and users. For example, it will be important to group together attributes that are being maintained by the same users. You should also consider structuring your attributes in such a way that you add more in the future as your business changes.

To help with the organization of attributes, a hierarchy is used, which consists of three levels: group set, group, and attribute. Group set is the name of the page, when the attribute screen is opened. Group level is shown as a container on the page, containing the attributes.



Group Sets

Group set is the highest level of the CFAS hierarchy. This is the level that is displayed in the Other Attributes menu where the attributes are accessed for each entity.



For each entity, you can define up to 99 attribute group sets. For each group set, you must define the following:

- **Display Order** - The order in which the attribute group set will appear in the More Actions menu of the relevant entity.
- **View Name** - The name that will be used for the database view that will be created for this group set. A view is a required information for each group set and is used for querying the data in Merchandising, as well as for integration from and to external solutions.
- **Staging Table Name** - The name that will be used for the staging table that will be created for this group set. Although staging table information is optional, it is recommended that you provide staging table name to support data loading from integrated systems. Each group set can have one staging table.
- **Labels** - Sets the business name for the group set. The label is the title that will appear in the Option menu for the entity when the attribute group set is accessed. You must set at

least one label for the primary language for each group set you create. You can choose to create labels for more (alternate) languages, based on your business need.

Groups

Once you determine the attribute group sets needed for each entity, the next step is to determine how the attributes will be organized within these sets. The attributes themselves are organized into groups, which is the middle layer of the hierarchy. Although you can create as many attribute groups as you want for each group set, you can only have 25 attributes in each attribute group.

When planning the attribute groups, in order to properly validate and display the information in the screens, you must determine the following in addition to the attributes themselves:

- **Display Order** - The order in which the attribute group set will appear in the Flex Attribute screen menu of the relevant entity.
- **View Name** - The name that will be used for the database view that will be created for this group. Similar to the view defined at the group set level, this view will contain all attributes in the group. A view is a required information for each group and is used to facilitate querying attribute information for the group.
- **Labels** - Sets the business name for the group and will be the name that appears on the screen. You must set at least one label for the primary language for each group set you create. You can choose to create labels for more (alternate) languages based on your business need.

Managing Entities, Group Sets and Groups

To add, update, or remove CFAS group sets or groups, select the template type of Administration from the Download Data screen and then the template Custom Flex Attribute Foundation. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice. There will be several tabs in the workbook that is generated that is used for managing the configuration of entities, group sets, and groups.

> **Note:**
>
> The Entity tab in this spreadsheet is for visibility only. New entities cannot be added and custom validation functions are not supported in a SaaS implementation.

Add a Group Set

To add a group set, select the action type of Create in an empty row in the CFA Group Sets tab in the workbook. Next, enter a unique number of up to 10 digits as the Group Set ID. Then, select the Merchandising base table name where the group set will be associated, the order you want it displayed in the Merchandising UI, and define the name you want to use for the view and staging tables that will be created for the group set when activated. The view and staging table names can be up to 30 characters in

length. The columns for Qualifier Function, Validation Function, and Default Function should be left blank, as this functionality is not supported for SaaS implementations.

For each group set created, you will also need to define at least one label in your primary language. To do this, navigate to the CFA Group Set Labels tab in the workbook. In a blank row in the worksheet, select an action type of Create and then enter the group set ID you used for your group set. Then, select your primary language configured in Merchandising and enter the label name you want used in the Label field. You can create labels of up to 255 characters, but it is recommended to try not to exceed 60 characters for best display in the Merchandising screens. Repeat this process for all languages you require for your users.

Add a Group

To add a group, select the action type of Create in an empty row in the CFA Groups tab in the workbook. Next, enter a unique number of up to 10 digits as the Group ID. Then, select the group set where the group will be associated, the order you want it displayed in the Merchandising UI, and define the name you want to use for the view that will be created for the group when activated. The view name can be up to 30 characters in length.

For each group created, you will also need to define at least one label in your primary language. To do this, navigate to the CFA Group Labels tab in the workbook. In a blank row in the worksheet, select an action type of Create and then enter the group ID you used for your group. Then, select your primary language configured in Merchandising and enter the label name you want used in the Label field. You can create labels of up to 255 characters, but it is recommended to try not to exceed 60 characters for best display in the Merchandising screens. Repeat this process for all languages you require for your users.

Modify an Entity, Group Set, or Group

If you would like to update any details for an entity, group set, group, or record group, a similar process will be followed as that described above for creating new. First, download the spreadsheet, and then navigate to the tab where you would like to make your updates. In the tab where you are going to make your updates, select the action type of Update, and then correct the value in the spreadsheet. The following columns can be updated in each tab:

- CFA Group Sets - Display Order; also, Group Set View Name and Staging Table Name prior to attributes being activated for the group set.
- CFA Group Set Labels - Label
- CFA Groups - Display Order; also, Group View Name prior to attributes being activated for the group.
- CFA Group Labels - Label

> **Note:**
>
> Once attributes are active, the data that can be updated for each of these areas is limited to the following: labels and display order

Delete a Group Set

If you wish to remove a group set, navigate to the CFA Group Set tab in the spreadsheet and select the Delete action on the row of the group set, you wish to delete. You must also

remove all labels that have been associated with that group set in the CFA Group Set Labels tab, by selecting the Delete action in the row associated with those labels. Group sets cannot be deleted if the attributes in the group set have been activated, however labels can be removed at any time.Group sets cannot be deleted if they are active.

Delete a Group

If you wish to remove a group, navigate to the CFA Groups tab in the spreadsheet and select the Delete action on the row of the group, you wish to delete. You must also remove all labels that have been associated with that group in the CFA Group Labels tab, by selecting the Delete action in the row associated with those labels. Groups cannot be deleted if the attributes in the group have been activated, however labels can be removed at any time.

Groups cannot be deleted if they are active.

Uploading Changes

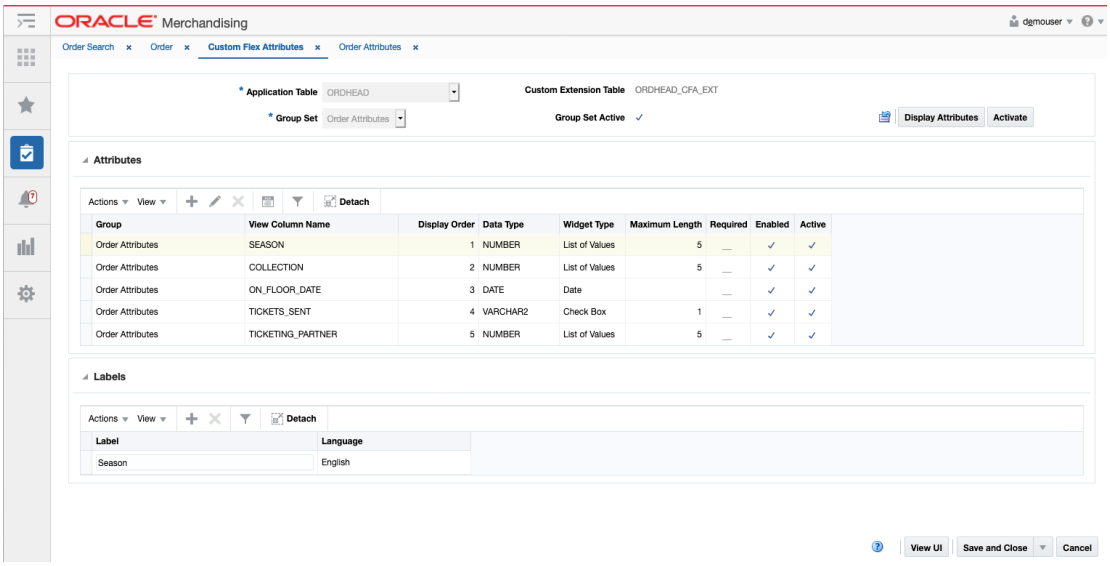
For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select **Foundation Data > Upload Foundation Data** from the main task list. In this screen, you'll again select the template type Administration and the template Custom Flex Attribute Foundation. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the **Foundation Data > Review Status** task from the main task list.

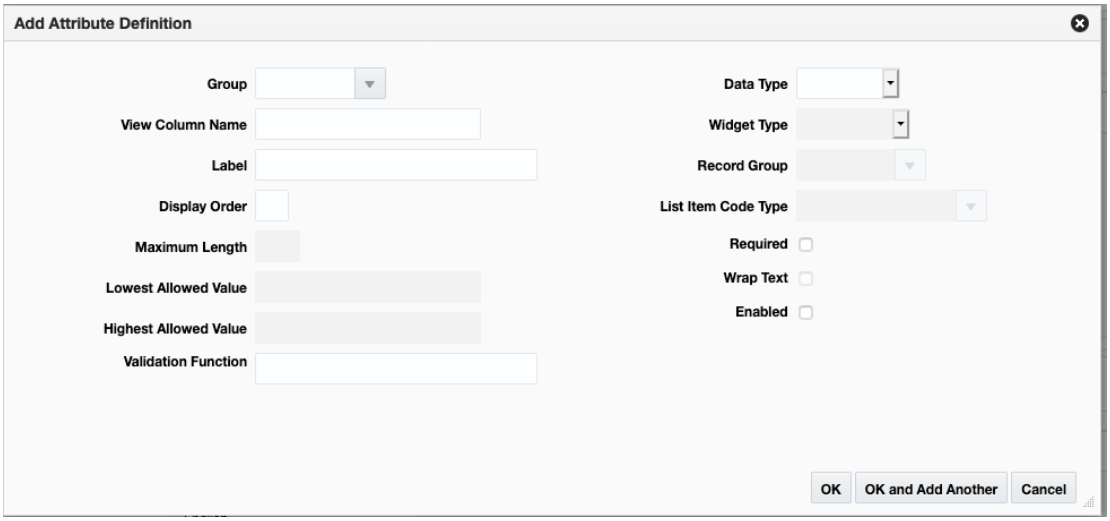
See also the *Oracle Retail Merchandising Do the Basics User Guide* section on "Download/Upload Data from Spreadsheets" for more information.

Attributes

Attributes are the bottom layer of the hierarchy. As mentioned above, you can have 25 attributes per group. Of those 25 attributes, up to 10 can to be character-based attributes, up to 10 can be number-based attributes, and up to 5 can be date attributes. You should consider this limit when planning the attributes to be included in each group.



To start specifying attributes, enter the entity you want to add the attributes to in the Application Table field, and then select the group set you previously created, then click **Display Attributes**. Next, select the Add option in the Actions menu or select the iconic button to begin adding attributes.



When creating attributes, you'll need to specify the following:

- **View Column Name** - this value will be used to define the name of the attribute in the group set and group level views, as well as the group set level staging table.
- **Label** - you will be required to add at least one label for the attribute in the primary language. But, labels for other languages can also be added.
- **Display Order** - Indicates the order in which the attributes will appear in the attribute screen, from top to bottom. Attributes will appear in a single column on the screen.
- **Maximum Length** - Indicates the maximum number of digits or characters that are allowed in the attribute, as well as the width of the attribute on the screen. You must

specify this information for the attributes with Number or Varchar data types. This may not apply when you choose a List Item or Check box as the widget type. The maximum length for the List Item widget type is automatically set to 6 and the maximum length for the Check box widget type is automatically set to 1. For attributes with Number data type, you must enter the full length of the number. This includes the length to be allowed after the decimal point and positive/negative sign (if negative numbers are allowed). For example, if a particular attribute needs to allow for five digits with up to two digits after the decimal point and allow negative integers, you will need to specify the length as 9 (1 character for positive/negative sign, 5 digits before the decimal point, 1 decimal point, and 2 digits after the decimal point).

> **Note:**
>
> If you choose a record group, the maximum length will be automatically selected based on the value in the first column of the record group query.

- **Minimum/Maximum Value Allowed** - Optional and applies to attributes with Number or Date data types. Indicates the minimum and maximum numeric or date value that can be entered for the attribute. For date widgets, the minimum and maximum definition is the number of days.

  For example, if an attribute was added for an item that was Ecommerce Launch Date and the attribute was set like this:

  – Lowest Allowed Val: 0

  – Highest Allowed Val: 10

  If the current VDATE is 12-SEP, then the min/max setup would not allow this attribute to be earlier than 12-SEP or greater than 22-SEP.

- **Data Type** - Indicates the type of data for the attribute. You can set this as a Number, Varchar, or Date.

- **Widget Type** - Indicates the type of the field that will appear for the attribute. You can select one of the following options:

  – Text Item - used for both Number and Varchar data types. When used, the attributes field will appear as a text box on the screen.

  – List of Values (LOV) - used for the Varchar data types only. A list of values appears as combo box LOV. If you choose to use this widget type, you must also specify a record group (see "Managing Record Groups").

  – List Item - used for the Varchar data type only. When used, the attributes field will appear as a select one choice dropdown on the screen. If you choose to use this widget type, you must also specify a code type in the List Item Code Type field. The valid codes types are those that exist on the Codes and Descriptions table in Merchandising. For more information on Codes and Descriptions, see the *Oracle Retail Merchandising Implementation Guide*.

  – Check box - used for Varchar data type only. When used, the attributes field will appear as a check box on the screen.

  – Date - used for Date data type only. When used, the attributes field will appear with the calendar icon to allow users to select dates.

- **Required** - Indicates whether the attribute will be considered as a mandatory field. Once an attribute is activated, it is recommended that you avoid changing this information.
- **Wrap Text** - used for data type of VARCHAR and widget type Text Item, this may be used if you expect to have longer than usual text entered for your text item and want the widget to support wrapping text on the screen.
- **Enabled** - Indicates whether the attribute appear as enabled or disabled (greyed out); only enabled attributes can be updated in the attribute screen. For attributes where you want the users to enter information, you must set them as enabled. For attributes that will display a default value (using a default function at the group set level), you will need to set them as disabled.
- **Validation Functions** - this is not supported for SaaS implementations, so should always be left blank.

Once you have specified the attributes to be added, you can choose the View UI button to see an example of what the attributes will look like once they are activated. If needed, make any changes to display order, labels, and so on. When you are ready to activate the attributes, which will make them visible to users, click the Activate button. This also generate the views at the group set and group level as you have defined them.

Managing Record Groups

To add, update, or remove record groups, select the template type of Administration from the Download Data screen and then the template Custom Flex Attribute Foundation. Click the Download button and when prompted, choose to either open the .ods file that is generated or save the file and open it separately in the spreadsheet application of your choice. There will be two tabs in the workbook that is generated that is used for managing the configuration of record groups.

Add a Record Group

If you plan to add any attributes that are of type List of Values, then you will need to define a record group as part of the configuration. To add a record group, select the action type of Create in an empty row in the CFA Record Groups tab in the workbook. Next, enter a unique number of up to 10 digits in the Record Group column and enter a name in the Record Group Name column of up to 30 characters in your configured primary language. Next, you'll choose the query type of either simple or complex. A simple query will be generated systematically based on the addition of attributes in the spreadsheet. Whereas a complex query can include more conditions and must be defined outside this worksheet.

Note that in a **cloud service implementation**, only the simple query type is supported. For simple queries, you'll need to include the following information:

- Table Name - the table against which the record group query will execute; this must be a valid table name in the Merchandising schema - for example, UDA_VALUES. This can be up to 30 characters in length.
- Value Column - this will be part of the generated select statement in the record group that will return an entity ID; it is usually the primary key of the table specified in the Table Name column (for example, UDA_VALUE). This can be up to 30 characters in length.
- Description Column - this will be part of the generated select statement in the record group that will return a description that corresponds to the value column; it is usually the description of the entity as defined in the table name (for example, UDA_VALUE_DESC). This can be up to 30 characters in length.

- Column 1 - the three values here will be used to generate a where clause if you want the record group to return only a subset of the table. This is optional for all simple queries, but if one value is defined for column 1, then all three must be defined.
  - Where - column name that should be used to limit the values returned (for example, UDA_ID). This can be up to 30 characters in length.
  - Operator - valid values are !=, <, <=, =, >, >=, is NULL, or is not NULL
  - Condition - indicates the condition that will limit the results. For the UDA example, this may be the specific UDA ID that should be returned. This can be up to 120 characters in length.
- Column 2 - this is optional for all simple queries, but if one value is defined for column 2, then all three of where, operator, and condition must be defined.

For complex record groups, you will need to insert the query you want direction into the CFA_RECORD_GROUP table in Merchandising. So, the columns listed above are not required.

For each record group created, you will also need to define at least one set of labels in your primary language. To do this, navigate to the CFA Record Group Labels tab in the workbook. In a blank row in the worksheet, select an action type of Create and then enter the record group ID you used for your record group.

Then, select your primary language configured in Merchandising and enter the label names you want used in the LOV Title, Value Column, and Desc Column Header fields. You can create labels of up to 255 characters, but it is recommended to try not to exceed 60 characters for best display in the Merchandising screens. Repeat this process for all languages you require for your users.

Modify a Record Group

If you would like to update any details for an entity, group set, group, or record group, a similar process will be followed as that described above for creating new. First, download the spreadsheet, and then navigate to the tab where you would like to make your updates. In the tab where you are going to make your updates, select the action type of Update, and then correct the value in the spreadsheet. The following columns can be updated in each tab:

- CFA Entity - add a custom function in the Validation Function column using the full package function name (package_name.function_name)
- CFA Group Sets - Display Order, Qualifier Function, Validation Function, and Default Function; also, Group Set View Name and Staging Table Name prior to attributes being activated for the group set.
- CFA Group Set Labels - Label
- CFA Groups - Display Order; also, Group View Name prior to attributes being activated for the group.
- CFA Group Labels - Label
- CFA Record Groups - no changes can be made once the attribute using this record group is active; prior to activation, the following columns are editable: Record Group Name, Query Type, Table Name, Value Column, Description Column, Where Column 1, Operator 1, Condition 1, Where Column 2, Operator 2, Condition 2

- CFA Record Group Labels - LOV Title, Value Column, Desc Column Header

> **Note:**
>
> Once attributes are active, the data that can be updated for each of these areas is limited to the following: labels, display order, and custom functions. For custom functions, the changes will be applicable going forward for editing or creating data in the impacted entity. It will not revalidate all the data that was previously created.

Delete a Record Group

If you wish to remove a record group, navigate to the CFA Record Groups tab in the spreadsheet and select the Delete action on the row of the record group, you wish to delete. You must also remove all labels that have been associated with that record group in the CFA Record Group Labels tab, by selecting the Delete action in the row associated with those labels. Record groups cannot be deleted if the attribute using the record group has been activated, however labels can be removed at any time.

Uploading Changes

For all actions defined above, once all the updates have been made to the data in the spreadsheet, save the file and close it. Then, return to the Merchandising screens and select Foundation Data > Upload Foundation Data from the main task list. In this screen, you'll again select the template type Administration and the template Custom Flex Attribute Foundation. This will generate a process description automatically, but this can be updated if desired. Lastly, select the Browse button and navigate to the directory where you saved the updated spreadsheet.

To review the status of the upload and check whether any errors occurred, select the **Foundation Data > Review Status** task from the main task list.

See also the *Oracle Retail Merchandising Do the Basics User Guide* section on "Download/ Upload Data from Spreadsheets" for more information.

Using Custom Flex Attributes

Flex attributes are not used in any base processing, but they can be included in custom reports, or integrated to other solutions. When querying flex attributes, it is recommended that you use the views at the group set or group level, so that the queries can be built more like for other tables. The views are automatically generated when the attributes are activated.

For integration, the flex attributes will also be automatically made available in inbound and outbound integration when they are activated. This is done slightly differently based on the method of integration.

For message-based integration through the Oracle Retail Integration Bus (RIB) and bulk data integration (BDI), attributes are published as name-value pairs based on the column name defined at the attribute level. This is true for outbound and inbound.

For spreadsheet upload and bulk loads that use those templates, the CFAS extension tables can also be enabled for addition to the templates. For entities like item and PO, where there is the ability to create your own templates, you will have the option to manually add the CFAS

extension tables to your customized templates using the view name defined at the group set level. For other entities, like diff types, where customization of templates isn't supported, the flex attributes are added automatically to the template when activated. For more information on customizing spreadsheet upload templates, see the Configure Spreadsheet Download/Upload section in the *Oracle Retail Merchandising Implementation Guide*.

If you have built any custom reports, integrations, or bolt-on applications that are based on the RDS or DAS data and wish to use CFAS as part of those, then you will likely want to use the database views described above for easier access to the data. Because views cannot be replicated, they will need to be created on the target database. To create these, a script (gen_cfas_view.sql) can be accessed through My Oracle Support note 2283998.1, including instructions for how to use the script (in Appendix C of the *Oracle® Retail Data Access Schema GoldenGate Target Installation and Configuration White Paper*).

> **Note:**
>
> Deals Upload does not support uploading flex attributes. If you add attributes at that level, they can only be managed in the Merchandising UI.

Migrating Custom Flex Attributes

If you have set up flex attributes in one environment, such as a pre-production environment, and want to migrate them to another, such as a production environment, the following process should be followed. Starting with migrating any new or changed attribute foundation data and then migrating the attributes.

Migrate Attribute Foundation

If you are creating or updating the group sets, groups, record groups, and/or their labels. Then the appropriate data should be exported into a spreadsheet from the source environment using the following steps:

1. From the Merchandising task list, select **Foundation Data > Download Foundation Data**.
2. In the Download Data page, select template type **Administration** and template **Custom Flex Attribute Foundation**. Click **Download**.
3. You will be prompted to either open or save the .ods in the spreadsheet application of your choice. Choose to open the file.

The resulting file will include all source environment data for groups sets, groups, record groups, and their labels. Remove all data that does not require adding or updating in the target environment from all tabs by deleting the rows (do not delete tabs or columns).

For each row in each tab that will be migrated, set the Action column to either Create, if the data doesn't already exist in the target, or Update, if you are updating existing information. Save your .ods file. You are now ready to migrate these data points.

Log into the target environment and follow these steps:

1. From the Merchandising task list, select **Foundation Data > Upload Foundation Data**.
2. In the Upload Data page, select template type **Administration** and template **Custom Flex Attribute Foundation**. A Process Description should default. Then, select your file clicking the **Browse….** Button. Click **Upload**.

To validate that your updates were processed without issue:

1. From the Merchandising task list, select **Foundation Data > Review Status**.
2. In the Data Loading Status page, check the status of the upload you just submitted. If the status is Processed with Errors, then click the **View Issues** button for more details and follow the error information to correct your data in the spreadsheet and repeat the upload steps with the corrected file.

Migrate Attributes

If you have new attributes to migrate the steps below should be followed.

1. In the source environment, from the Merchandising task list, select **Foundation Data > Download Foundation Data**.
2. In the Download Data page, select template type **Administration** and template **Custom Flex Attributes**. If desired, enter filter criteria to limit the table and group set whose details will be exported. Click **Download**.
3. You will be prompted to either open or save the .ods in the spreadsheet application of your choice. Choose to open the file.

The resulting file will include all source environment data for attributes, limited by the Merchandising table and group set, if you used the filtering. Remove all data that does not require adding to the target from all tabs by deleting the rows (do not delete tabs or columns), as needed.

For each row in each tab that will be migrated, set the Action column to Create. Save your .ods file. You are now ready to migrate these data points to the target.

Log into the target environment and follow these steps:

1. From the Merchandising task list, select **Foundation Data > Upload Foundation Data**.
2. In the Upload Data page, select template type **Administration** and template **Custom Flex Attributes**. A Process Description should default. Then, select your file clicking the **Browse….** Button. Click **Upload**.

To validate that your updates were processed without issue:

1. From the Merchandising task list, select **Foundation Data > Review Status**.
2. In the Data Loading Status page, check the status of the upload you just submitted. If the status is Processed with Errors, then click on the **View Issues** button for more details and follow the error information to correct your data in the spreadsheet and repeat the upload steps with the corrected file.

The last step for attribute migration is to activate the attributes in the target environment. This will make the attributes visible to users in the target environment and also create or update the views at the group set and group level that are used for inbound and outbound integrations. Follow these steps:

1. From the Merchandising task list, select **Application Administration > Custom Flex Attributes**.

2. Select the **Application Table** and **Group Set** where your attributes were added. Click **Display Attributes**.
3. Review the attributes listed and ensure all the information is as expected. You may also want to click the **View UI** button to validate the layout matches what you had in source environment. Then click **Activate**.

Repeat these steps for each table/group set combination where you are adding attributes.

3
Custom Validation Rules

The Custom Validation Rules functionality in Merchandising provides you with flexibility to supplement built-in validations on key data entities, like items and purchase order, by defining validations specific to your business needs. These rules are then executed during approval or activation processes.

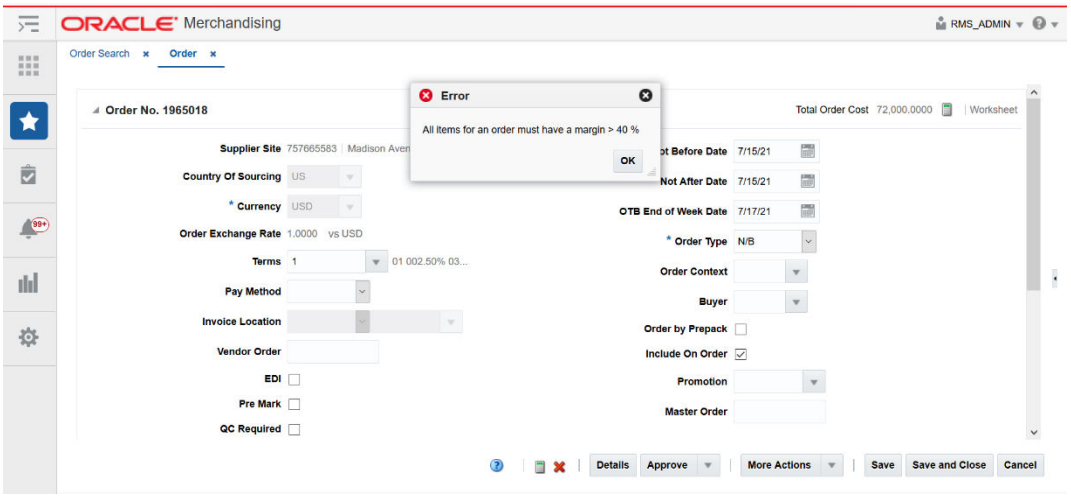
As part of the rule creation, you will choose tables and columns to build a query that will check for the presence or absence of a condition. Also part of the definition is the error message that would be presented to the user if the rule is violated and the order in which it should be executed, if you have more than one custom rule for an entity. Upon successful approval, the rules will be validated each time a specific event takes place, like submitting an item, approving a purchase order, or activating a partner.

Following validation types are entitled for Custom Validation Rules:

- Item Submission/Approval
- Purchase Order Submission/Approval
- Supplier Activation/Deactivation
- Partner Activation/Deactivation

An approved rule will be executed through all ways of executing the specific event the rule is defined for, after the base validations have been completed. For example, if a rule is defined for purchase order approval, the rule is validated through all modes of order creation - manual creation, replenishment, spreadsheet upload, etc.

Figure 3-1 Custom Rule Validation for Order Approval



Defining Custom Validation Rules

Validation Rule wizard, accessed from the Create Custom Validation Rule option in the Application Administration menu in the Merchandising task list or via the Manage Custom Validation Rules search results, allows you to create and manage validation rules. The most elementary details which are needed to create a validation rule on an entity are description, type, associated error, execution sequence, and the query. The wizard also supports complex calculations involving multiple columns from one or more database tables.

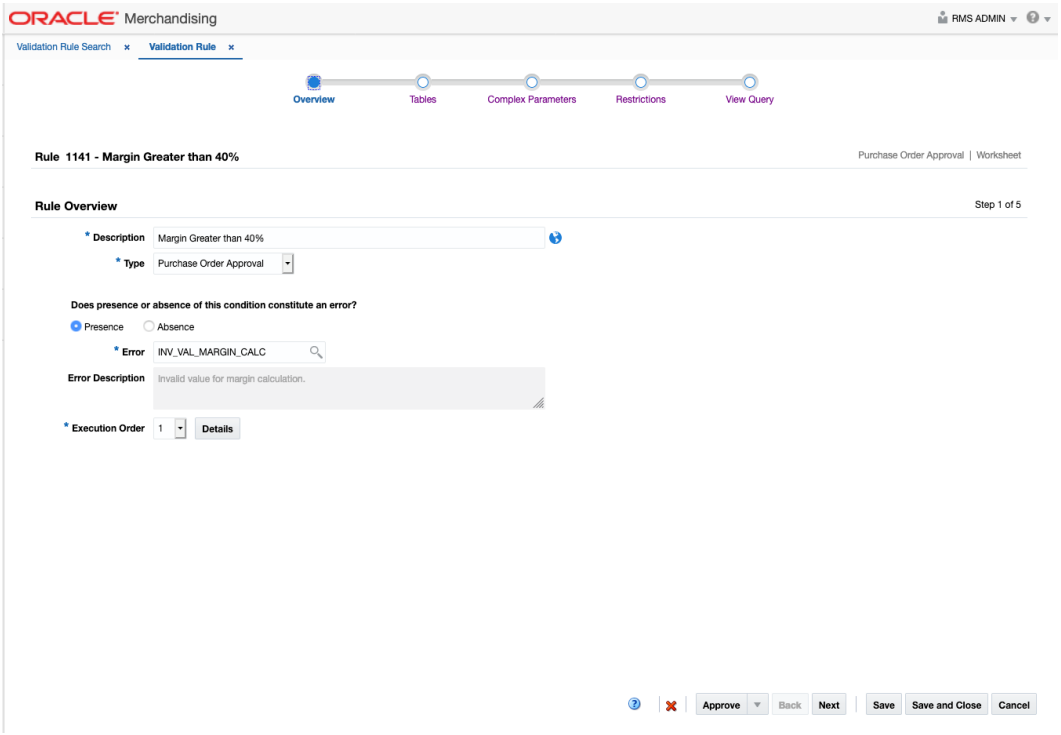
Overview

The first step in the Validation Rule wizard is the rule overview stop, which allows you to define basic information and characteristics for a rule. As per your rule definition. For each rule, you must define the following:

- **Description** - A description for the rule.
- **Type** - Determine the event for when rule is executed. Valid values are:
  - Item Submission
  - Item Approval
  - Purchase Order Submission
  - Purchase Order Approval
  - Supplier Activation
  - Supplier Deactivation
  - Partner Activation
  - Partner Deactivation

In addition, this determines the metadata corresponding to the event. See the Metadata section below for more details on what is available for each event type.

- **Presence/Absence** - Specify whether the rule triggers an error when the constraint condition is met (presence) or when the data does not exist in the data set (absence).
- **Error** - Associate a predefined error with the rule. Custom error messages can be added using the spreadsheet download/upload functionality in Merchandising. See the *Merchandising Implementation Guide* for more details.
- **Execution Order** - Determine the order in which rules are executed within a type after the base rules are executed. Maximum execution order for a validation type is 20. However, there is no limit on number of rules at each execution order. Clicking on the Details button will show you the other rules that have been approved for the selected type to help in deciding on the execution order for your rule.



Tables

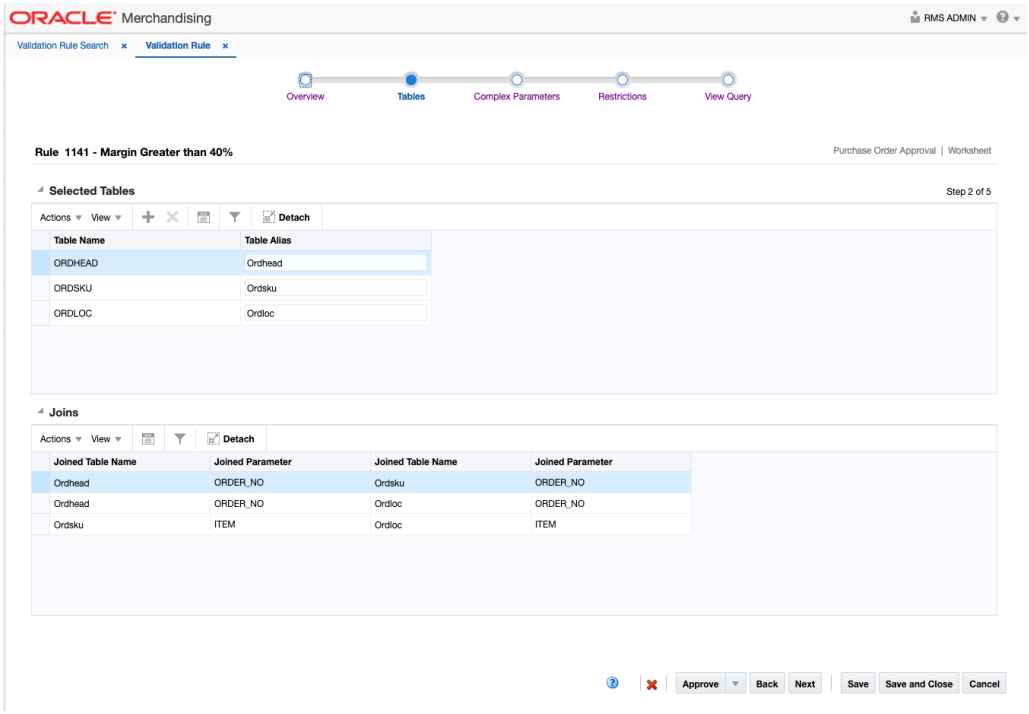
This stop in the wizard allows you to add tables to a rule and view the joins between the tables.

Selected Tables

By default, the primary table associated with the selected validation type is added to the rule, but you can also add tables to a rule from the list of available tables, as needed to define your rule, and define an alias for the added tables. For example, if you choose the rule type Purchase Order Approval, the ORDHEAD table is automatically added, but you may also want to include some of the other ordering tables like ORDLOC. The availability of tables is driven by metadata for each validation type (see "Migrating Custom Validation Rules" for more information).

Joins

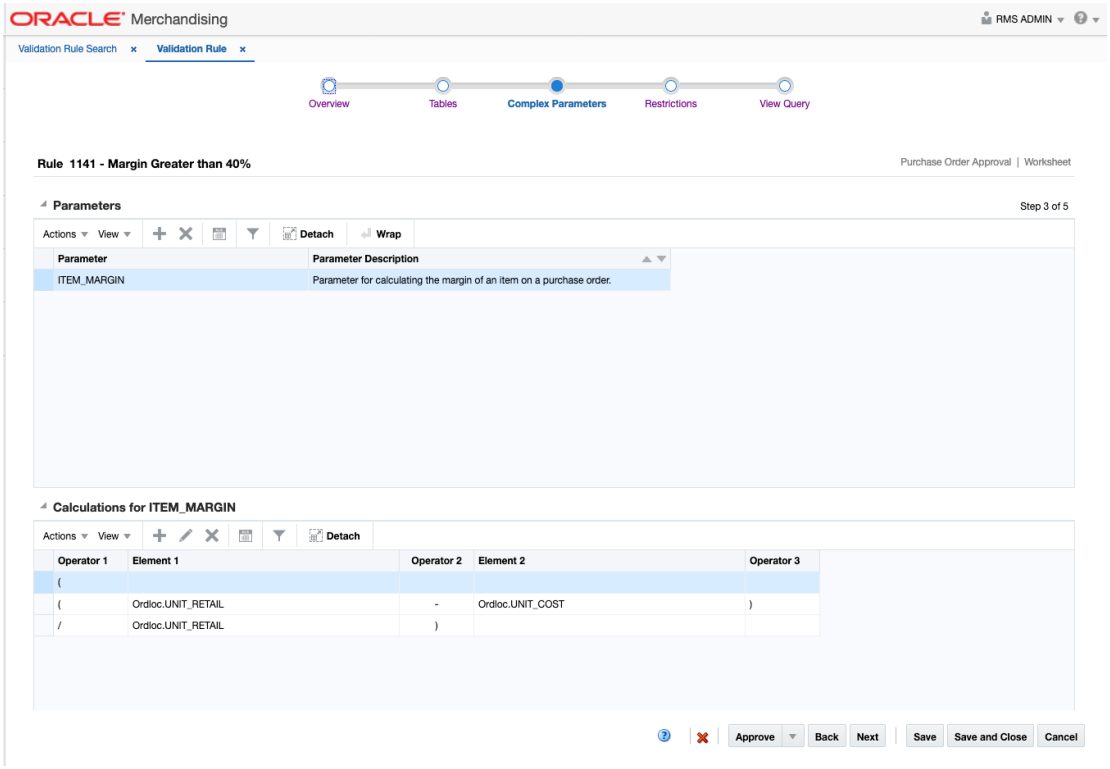
Based on tables added, the joins are automatically added to restrict the dataset. For example, in the image below, you can see that a join was automatically added on ORDER_NO when the ORDLOC table was added to the rule. The only edits allowed for table joins are for cases where there is an ambiguity in columns names amongst tables, such as if you add the same table twice. For example, you may choose to add ITEM_MASTER twice for an item approval rule if you are needing to valid something for a parent or child item during approval. When a table can be joined with more than one selected table, you can choose which one to add in the join from a list provided.



Complex Parameters

The next step in the rule setup, Complex Parameters, is optional. It allows you to define named parameters which are derived by applying arithmetic operators on columns from the selected tables. Later, you can add restrictions to the rule using these complex parameters. In the below example, a complex parameter for calculating an item's margin on a purchase order is shown.

Once you have determined the complex parameter required for a rule, begin by providing the name and description for the parameter. And then, add underlying calculations by choosing required arithmetic operators from the provided list and columns that are available in the tables that were previously added to the rule. As necessary, a calculation can extend through multiple lines under calculations section.

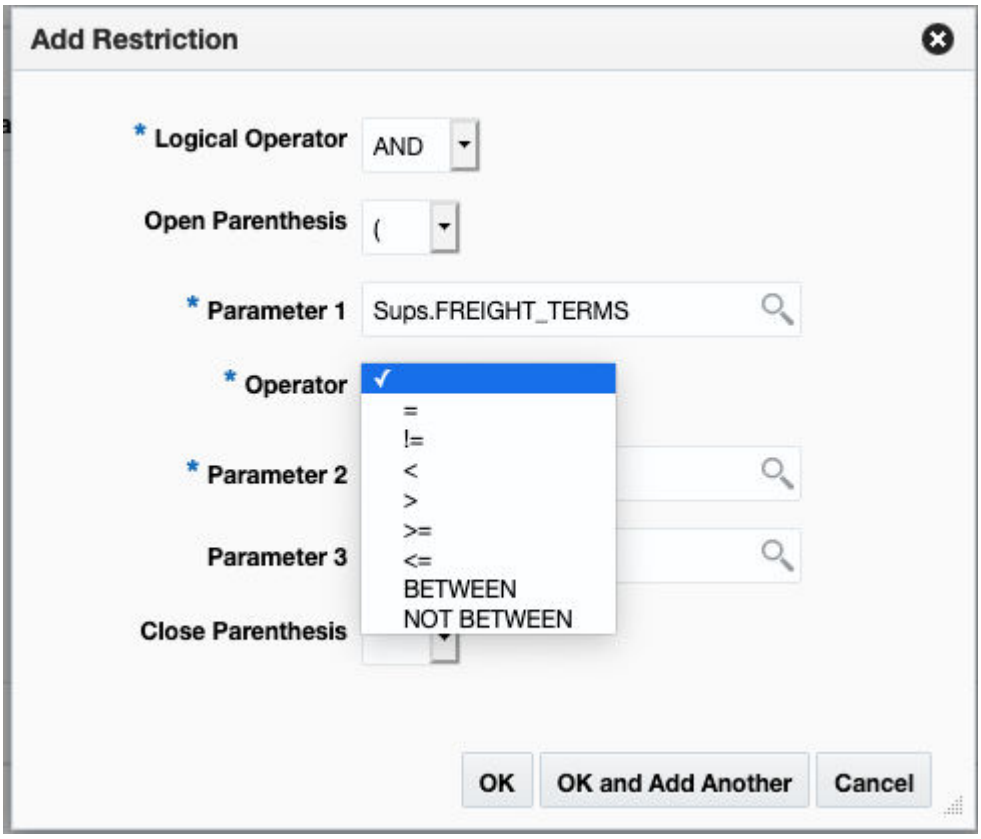


Restrictions

The Restrictions stop in the Validation Rule setup. At least one restriction is required, as this is what defines the rule. These constraints can be added by table values or by constants.

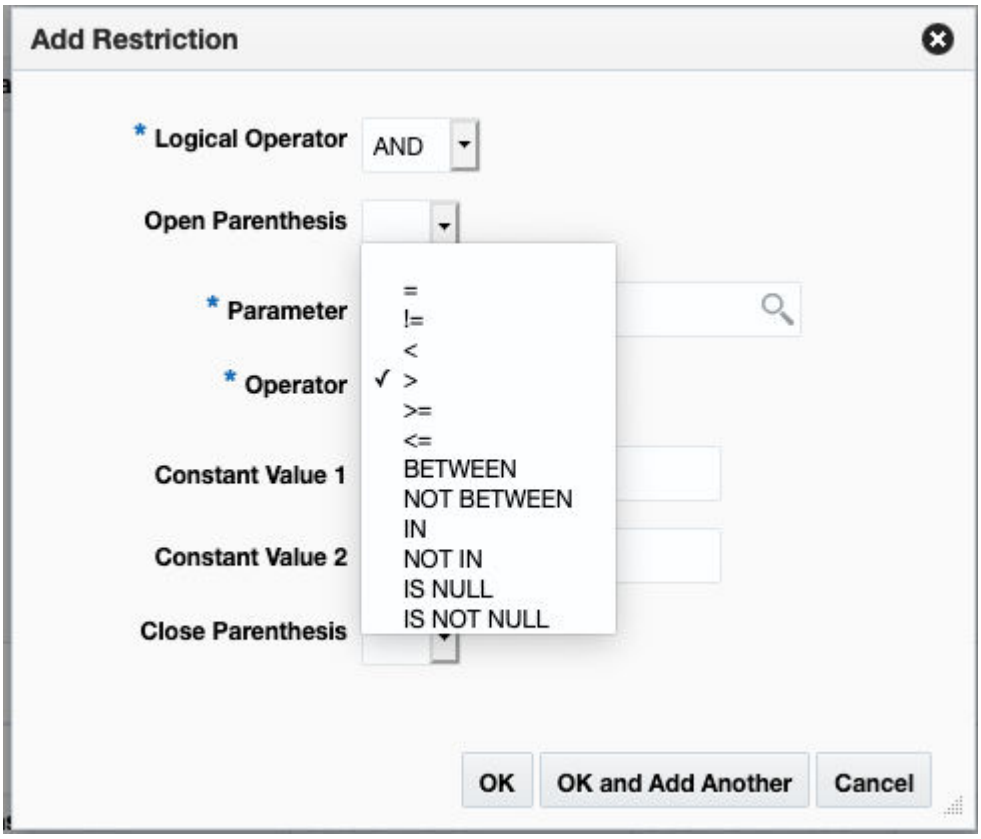
Restrict Results by Table Values

In this section, you can define restrictions by comparisons between two table columns. These would supplement the joins already defaulted to join the tables by their primary key. The comparisons can be defined using various operators, as shown below. You can also define the restriction as an AND or OR condition. Columns on the tables that were added to the rule and complex parameters can be used here.



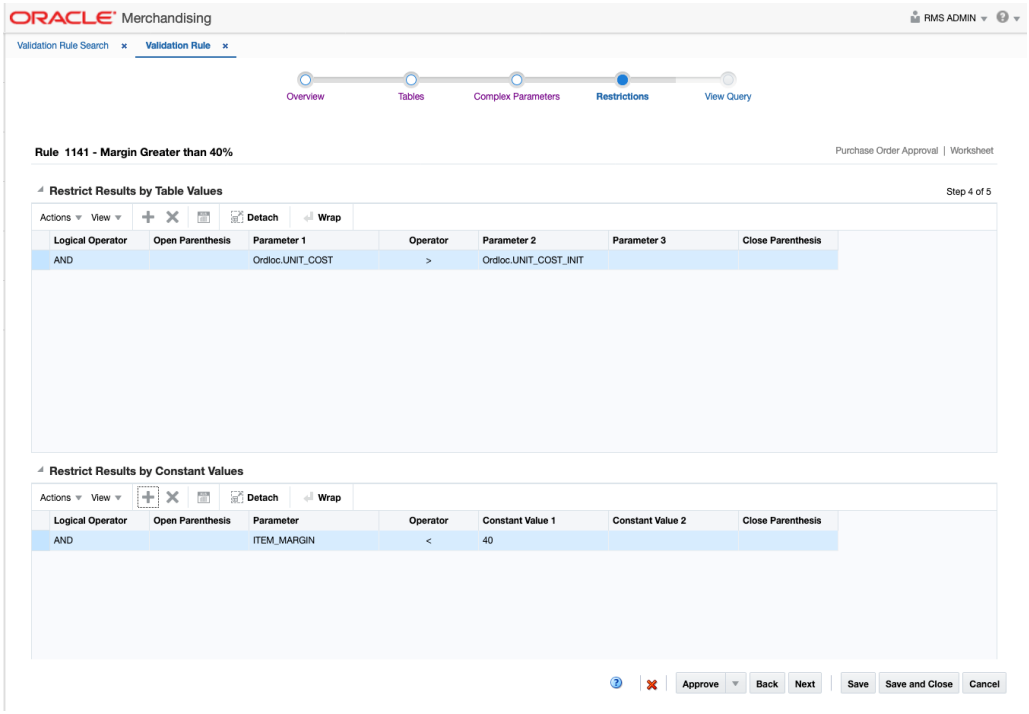
Restrict Results by Constant Values

In this section, you can define restrictions by comparing table columns or complex parameter definitions to a constant value. The comparisons can be defined using various operators, as shown below. You can also define the restriction as an AND or OR condition.



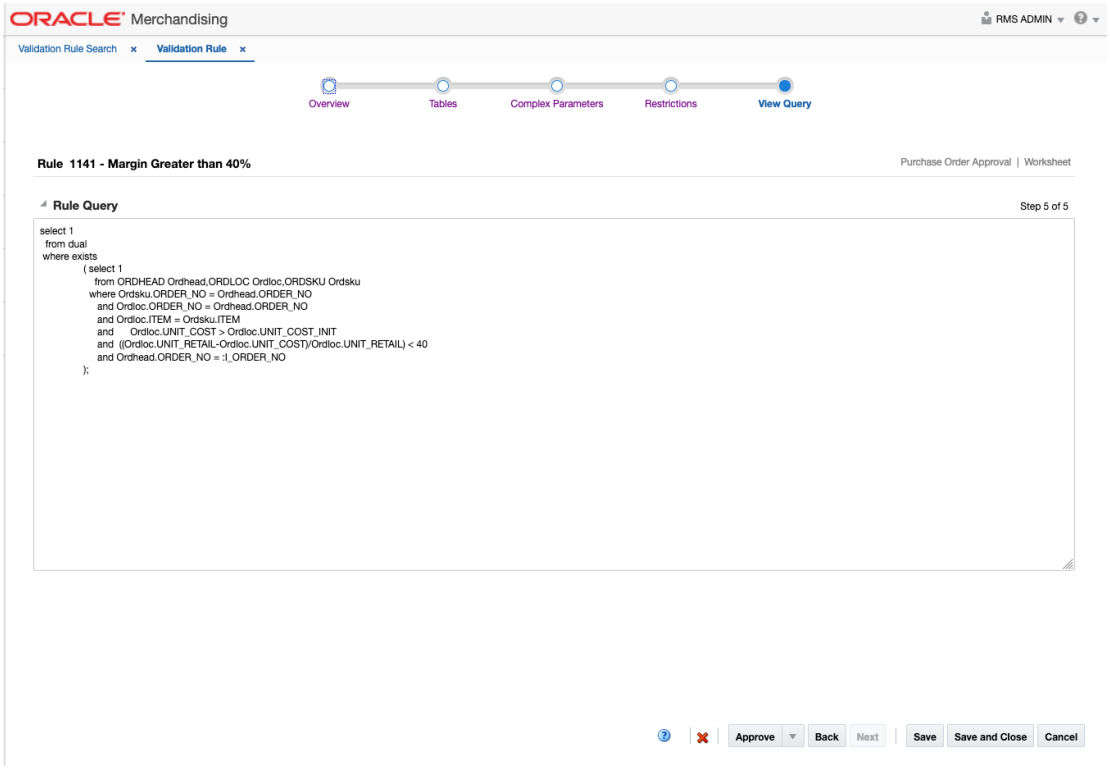
Note:

When the rule query is constructed, strings are systematically enclosed within single quotes as required by SQL syntax. To avoid built-in functions like USER, GET_USER converting into a string due to above, enclosed built-ins within single quotes (') and pipe (||) operators when adding restrictions by constant values, e.g. if you are adding restriction to validate users stored in the table against your application login user, add GET_USER function as '||GET_USER||' in the Add Restriction popup.



View Query

The last step in the wizard is to view the query that you have created based on the tables, complex parameters, and restrictions you've added. In the SQL query construct, the WHERE clause is designed to validate restrictions using "EXISTS" or "NOT EXISTS" conditions based on the setting for whether the presence or absence constitutes an error. You can validate the rule gives you the desired results by accessing the Data Viewer, copying the generated query, and replacing the input parameter. For example, in the image below the input parameter :I_ORDER_NO can be replaced by an actual order number for testing.



Approving Rules

A rule will not be run until it has been approved. Once you are satisfied with the rule construction, you can select to approve the rule and it will be executed the next time a user takes the action defined in the rule type (e.g. approve an item). To deactivate a rule, you can set it to Closed status or move it back to Worksheet status and to edit the rule or delete it if it is no longer valid. Existing rules are accessed through the Manage Custom Validation Rules option in the Merchandising task list under Application Administration.

Migrating Custom Validation Rules

If you have defined custom validation rules in one environment, such as a pre-production environment, and want them migrated to another environment, such as a production environment, this will require an SR to be logged, as this activity requires the support from the Oracle Cloud Operations team.

Rule Metadata

The below table outlines the metadata corresponding each validation type. This includes automatically added table and the additional tables which are available for your selection while defining a rule.

Table	Item Submission/ Approval	PO Submission/ Approval	Supplier Activation/ Deactivation	Partner Activation/ Deactivation
ADDR		Y	Y	Y

Table	Item Submission/ Approval	PO Submission/ Approval	Supplier Activation/ Deactivation	Partner Activation/ Deactivation
ALLOC_DETAIL		Y		
ALLOC_HEADER		Y		
CLASS	Y	Y		
CLASS_CFA_EXT	Y	Y		
DEPS	Y	Y		
DEPS_CFA_EXT	Y	Y		
FUTURE_COST		Y		
ITEM_CHRG_DETAIL	Y			
ITEM_CHRG_HEAD	Y			
ITEM_EXP_DETAIL	Y	Y		Y
ITEM_EXP_HEAD	Y	Y		Y
ITEM_HTS	Y	Y		
ITEM_HTS_ASSESS	Y	Y		
ITEM_IMAGE	Y	Y		
ITEM_IMAGE_TL	Y	Y		
ITEM_IMPORT_ATTR	Y	Y		
ITEM_LOC	Y	Y		
ITEM_LOC_CFA_EXT	Y	Y		
ITEM_LOC_SOH	Y	Y		
ITEM_LOC_TRAITS	Y	Y		
ITEM_MASTER	**Automatically added**	Y	Y	Y
ITEM_MASTER_CFA_EXT	Y	Y	Y	Y
ITEM_SEASONS	Y	Y		
ITEM_SUPP_MANU_COUNTRY	Y	Y	Y	
ITEM_SUPP_UOM	Y	Y	Y	
ITEM_SUPPLIER	Y	Y	Y	
ITEM_SUPPLIER_CFA_EXT	Y	Y	Y	
ITEM_SUPPLIER_COUNTRY	Y	Y	Y	
ITEM_SUPPLIER_COUNTRY_CFA_EXT	Y	Y	Y	
ITEM_SUPPLIER_COUNTRY_LOC	Y	Y	Y	
ITEM_SUPPLIER_COUNTRY_LOC_CFA_EXT	Y	Y	Y	
ITEM_TICKET	Y	Y		
ITEM_XFORM_DETAIL	Y	Y		
ITEM_XFORM_HEAD	Y	Y		
ORDCUST		Y		
ORDCUST_DETAIL		Y		

Table	Item Submission/ Approval	PO Submission/ Approval	Supplier Activation/ Deactivation	Partner Activation/ Deactivation
ORDHEAD		**Automatically added**	Y	
ORDHEAD_CFA_EXT		Y	Y	
ORDHEAD_DISCOUNT		Y		
ORDHEAD_REV		Y	Y	
ORDLC		Y		
ORDLOC		Y		
ORDLOC_CFA_EXT		Y		
ORDLOC_DISCOUNT		Y		
ORDLOC_EXP		Y		Y
ORDLOC_REV		Y		
ORDSKU		Y		
ORDSKU_CFA_EXT		Y		
ORDSKU_HTS		Y		Y
ORDSKU_HTS_ASSESS		Y		Y
ORDSKU_REV		Y		
ORG_UNIT			Y	
ORG_UNIT_ADDR_SITE			Y	
OTB		Y		
PACKITEM	Y	Y		
PACKITEM_BREAKOUT	Y	Y		
PARTNER	Y	Y	Y	**Automatically added**
PARTNER_CFA_EXT	Y	Y	Y	Y
PARTNER_ORG_UNIT			Y	
RELATED ITEM_DETAIL	Y			
RELATED_ITEM_HEAD	Y			
RPM_CLEARANCE				
RPM_CLEARANCE_GROUP				
RPM_FUTURE_RETAIL				
RPM_ITEM_ZONE_PRICE	Y			
RPM_MERCH_RETAIL_DEF				
RPM_PRICE_CHANGE				
RPM_PRICE_CHANGE_GROUP				
RPM_ZONE				
RPM_ZONE_GROUP				
RPM_ZONE_LOCATION				
SE_EVALUATION_RESULTS	Y	Y	Y	
SE_EVALUATION_RESULTS_TL	Y	Y	Y	

Table	Item Submission/ Approval	PO Submission/ Approval	Supplier Activation/ Deactivation	Partner Activation/ Deactivation
STORE	Y	Y		
STORE_CFA_EXT	Y	Y		
STORE_HIERARCHY	Y	Y		
SUBCLASS	Y	Y		
SUBCLASS_CFA_EXT	Y	Y		
SUP_INV_MGMT	Y	Y	Y	
SUP_TRAITS	Y	Y	Y	
SUPS	Y	Y	**Automatically added**	Y
SUPS_CFA_EXT	Y	Y	Y	Y
SUPS_IMP_EXP	Y	Y	Y	Y
UDA	Y			
UDA_ITEM_DATE	Y	Y		
UDA_ITEM_FF	Y	Y		
UDA_ITEM_LOV	Y	Y		
UDA_VALUES	Y			
VAT_DEPS	Y			
VAT_ITEM	Y	Y		
WH	Y	Y		
WH_CFA_EXT	Y	Y		

4

In Context Launch

Merchandising solutions expose select task flows that you can directly access from external solutions using a specific URL, custom reports, and so on. This feature is referred to as in-context launch because, as part of the URL, parameters for the workflow are passed in to open a page displaying information related to those parameters. For example, the Item task flow in Merchandising could be called for a specific item ID. The requested task flow will be displayed in a new browser window or tab, depending on the specified target of the URL.

Merchandising

Item Header

When this page is launched, Merchandising will display the information for the item included in the URL in either view or edit mode.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/
RmsHome?pmItem=<item>&pmMode=<mode>&navModelItemId=MaintainItemFlowExt
```

Parameters:

Parameter	Required	Description
pmItem	Yes	Item ID
pmMode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Item Supplier Country

When this page is launched, Merchandising will display the Item Supplier Country information based on the values sent in the URL in either view or edit mode.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/
RmsHome?
pmSupplierStr=<Supplier>&pmItem=<item>&pmMode=<mode>&pmSubClass=<subclass>&pmVPN=<VPN>&
navModelItemId=MaintainItemSuppCntryFlowExternal
```

Parameters:

Parameter	Required	Description
pmSupplier	Yes	Supplier site
pmItem	Yes	Item ID

Parameter	Required	Description
pmMode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.
pmVPN	No	Vendor product number for the item/supplier.

Item Location

When this page is launched, Merchandising will display the Item Locations based on the item sent in the URL.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?pmItem=<item&navModelItemId=MaintainItemLocsFlowExternal
```

Parameters:

Parameter	Required	Description
pmItem	Yes	Item ID

Item Search

When this page is launched, Merchandising will display the search results based on the VPN, supplier and/or hierarchy values sent in the URL. If none of the parameters are included, then the screen will be displayed with no search results.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmSupplierSite=<SupplierSite>&pmDept=<dept>&pmClass=<class>&pmSubClass=<subclass>
&pmVPN=<VPN>&navModelItemId=searchItemFlowExternal
```

Parameters:

Parameter	Required	Description
pmSupplierSite	No	Supplier Site ID
pmDept	No	Department ID
pmClass	No	Class ID
pmSubClass	No	Subclass ID
pmVPN	No	Vendor product number

Replenishment Attributes

When this page is launched, Merchandising will open the replenishment attributes based on the information in the URL.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmItemStr=<Item>&pmLocationStr=<Location>&pmMode=<mode>&navModelItemId=MaintainReplAttrFlowExternal
```

Parameters:

Parameter	Required	Description
pmItemStr	Yes	Item
pmLocationStr	Yes	Store or virtual warehouse ID
pmMode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Order Search

When this page is launched, Merchandising will display the search results based on the hierarchy values sent in the URL. One or more departments can be sent, or a single department/class or single department/class/subclass combination. If none of the parameters are sent, the screen will be displayed with no search results.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmDepts=<dept>&pmClass=<class>&pmSubClass=<subclass>&pmSuppStr=<supplier>&pmLocStr=<location>&pmOtbEowDateStr=<OTBEOWDate>&pmnotAfterDateStr=<NotAfterDate>&pmnotBeforeDateStr=<NotBeforeDate>&navModelItemId=searchOrderflowExternal
```

Parameters:

Parameter	Required	Description
pmDept	No	One or more department IDs to search for orders based on the items on the order; if multiple sent, they should be separated by commas. For example, pmDepts=100,200,300.
pmClass	No	Class ID for items on the order
pmSubClass	No	Subclass ID for items on the order
pmSuppStr	No	Supplier site for the order
pmLocStr	No	Location on the order
pmOtbEowDateStr	No	OTB End of Week Date for the order in the format DD-MON-RR.
pmnotAfterDateStr	No	Not Before Date for the order in the format DD-MON-RR.
pmnotBeforeDateStr	No	Not After Date for the order in the format DD-MON-RR.

Order

When this page is launched, Merchandising will display information for the order included in the URL in either view or edit mode.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmMode=<mode>&pmOrderNo=<order>&navModelItemId=MaintainPurchaseOrderFlow
```

Parameters:

Parameter	Required	Description
pmOrderNo	Yes	Purchase order number
pmMode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Order Details

When this page is launched, Merchandising will display information for the order included in the URL in either view or edit mode.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?pmMode=<mode>&pmOrderNoStr=<order>&navModelItemId=
MaintainOrderDetailFlow
```

Parameters:

Parameter	Required	Description
pmOrderNoStr	Yes	Purchase order number
pmMode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Create Purchase Order

When this page is launched, Merchandising will open the Purchase order creation screen populated with the values passed in the URL.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmMode=<mode>&notAfterDateStr=<notAfterDate>&notBeforeDateStr=<notBeforeDateStr>&
pmLocation=<Location>&pmDept=<Dept>&pmSupplierStr=<SupplierSite>&navModelItemId=C
reatePurchaseOrderFlowExternal
```

Parameters:

Parameter	Required	Description
pmSupplierStr	No	Supplier Site for the order
notAfterDateStr	No	Not After Date
notBeforeDateStr	No	Not Before Date
pmDept	No	Department; optional if department is not required for purchase orders.
pmMode	No	If included this should be passed as NEW.
pmLocation	No	If included, the PO created will be for a single location.

Transfer Search

When this page is launched, Merchandising will display the search results based on the parameters included in the URL. If none of the parameters are sent, the screen will be displayed with no search results.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmItem=<item>&pmFromLoc=<FromLocation>&pmToLoc=<toLocation>&pmFinisher=<Finisher>&navModelItemId=searchTransferFlowExternal
```

Parameters:

Parameter	Required	Description
pmItem	No	Item on the transfer to be used as search criteria
pmFromLoc	No	From location on the transfer to be used as search criteria
pmToLoc	No	To location on the transfer to be used as search criteria
pmFinisher	No	Finisher on the transfer to be used as search criteria.

Create Transfer

When this page is launched, Merchandising will display the screen for transfer creation populated with information included in the URL.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmDeptStr=<Dept>&pmFromLocStr=<FromLoc>&pmToLocStr=<toLoc>&pmFinisherStr=<Finisher>&pmDeliveryDateStr=<DeliveryDate>&pmFromLocType=<FromLocType>pmToLocType=<toLocType>&pmFinisherType=<FinisherType>&pmTsfType=<TransferType>&navModelItemId=
CreateMaintainTransferFlowExternal
```

Parameters:

Parameter	Required	Description
pmDeptStr	No	Department to use for the new transfer; required if the system option is set to require department on a transfer.
pmFromLocStr	No	From Location to use for the new transfer.
pmToLocStr	No	To Location to use for the new transfer.
pmFinisherStr	No	Finisher to use for the new transfer.
pmDeliveryDateStr	No	Delivery date to use for the transfer in the format DD-MON-RR.
Finisher Type	No	Indicates the type of finisher - Internal or External. Valid values - I or E.
TransferType	No	Type of transfer to create. Valid values are found in code type TR4E.

Transfer

When this page is launched, Merchandising will display information for the transfer included in the URL in either view or edit mode.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmMode=<mode>&pmTsfNo=<transfer>&navModelItemId=MaintainTransferHeaderFlow
```

Parameters:

Parameter	Required	Description
pmTsfNo	Yes	Transfer number
pmMode	Yes	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Return to Vendor Search

When this page is launched, Merchandising will display the search results based on the parameters included in the URL. If none of the parameters are sent, the screen will be displayed with no search results.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmSupplierStr=<Supplier>&pmLocationStr=<Location>&pmItem=<item>&navModelItemId=SearchReturnToVendorFlowExternal
```

Parameters:

Parameter	Required	Description
pmSupplierstr	No	Supplier site for the RTV
pmLocationStr	No	Location from where items will be shipped on the RTV. Can be a store or virtual warehouse.

Return to Vendor

When this page is launched, Merchandising will display the information for the RTV included in the URL in either view or edit mode.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?pmRtvOrderNo=<rtv>&pmMode=<mode>&navModelItemId=MaintainRtvDetailFlow
```

Parameters:

Parameter	Required	Description
pmRtvOrderNo	Yes	RTV number
pmMode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Transaction Data

When this page is launched, Merchandising will display the transaction data based on the search criteria included in the URL. In order to successfully execute the search, at least one of the following must be included department, item, store, or warehouse, along with the transaction date range.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmItem=<item>&pmWarehouse=<warehouse>&pmStr=<store>&pmTransStrtDate=<tran_start_date>&pmTransEndDate=<tran_end_date>&pmPostStrtDate=<post_start_date>&pmPostEdDate=<post_end_date>&pmCreateDate=<create_date>&pmDpt=<dept>&pmCls=<class>&pmSubcls=<subclass>&navModelItemId=ViewTransactionDataFlow
```

Parameters:

Parameter	Required	Description
pmItem	No	Item ID
pmWarehouse	No	Virtual warehouse ID
pmStr	No	Store ID
pmTransStrtDate	Yes	Start range for searching on transaction date
pmTransEndDate	No	End range for searching on transaction date; if not included in the URL, the start date will be used as the end date in the search.

Parameter	Required	Description
pmPostStrtDate	No	Start range for searching on post date
pmPostEdDate	No	End range for searching on post date
pmCreateDate	No	Create Date
pmDept	No	Department ID
pmCls	No	Class ID
pmSubcls	No	Subclass ID

Inventory Adjustment

When this page is launched, Merchandising will open the Inventory adjustment screen.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmItem=<item>&navModelItemId=MaintainInventoryAdjustmentByItemFlowExternal
```

Parameters:

Parameter	Required	Description
pmItem	Yes	Item ID for which to create the inventory adjustment

Shipment Search

When this page is launched, Merchandising will open the Shipment results based on the information in the URL.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmDistroNoStr=<DistroNo>&pmOrderNo=<OrderNo>&pmSupplier=<Supplier>&pmFromLoc=<FromLoc>&pmToLoc=<ToLoc>&navModelItemId=SearchShipmentFlowExternal
```

Parameters:

Parameter	Required	Description
pmDistroNoStr	No	Transfer or allocation ID for which to search for a shipment. Only one of either a distro number or order number should be included.
pmOrderNo	No	PO number for which to search for a shipment. Only one of either a distro number or order number should be included.
pmSupplier	No	Supplier site is used for PO shipment searches only
pmFromLoc	No	From location is used for transfer and allocation shipments
pmToLoc	No	To location can be used for searches for PO and transfers/ allocation shipments.

Shipment

When this page is launched, Merchandising will display information for the shipment included in the URL in either view or edit mode.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?pmShipment=<shipment>&pmMode=<mode>&navModelItemId=MaintainShipmentDetailFlow
```

Parameters:

Parameter	Required	Description
pmShipment	Yes	Shipment number
pmMode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Stock Order Reconciliation

When this page is launched, Merchandising will open the Transfer Reconciliation screen with results based on the information on the URL.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmDistroNoStr=<Distro>&pmBOL=<BOL>&pmCarton=<Carton>&pmFromLoc=<fromLoc>&pmToLoc=<toLoc>&navModelItemId=MaintainStockOrderReconciliationFlowExternal
```

Parameters:

Parameter	Required	Description
pmDistroNoStr	No	Transfer or allocation number to search for shipments requiring reconciliation.
pmBOL	No	Bill of Lading requiring reconciliation
pmCarton	No	Carton requiring reconciliation
pmFromLoc	No	From location which has a transfer or allocation requiring reconciliation. Can be a store, warehouse, or finisher.
pmToLoc	No	To location which has a transfer or allocation requiring reconciliation. Can be a store, warehouse, or finisher.

Receipt Adjustment by Units

When this page is launched, Merchandising will open the Receive Cost Adjustment page for a shipment.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmShipmentNo=<ShipmentNo>&navModelItemId=MaintainReceiptUnitAdjustmentFlowExternal
```

Parameters:

Parameter	Required	Description
pmShipmentNo	Yes	Shipment Number for which to perform a receipt adjustment.

Receipt Adjustment by Cost

When this page is launched, Merchandising will open the Receive Unit Adjustment.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmOrderNoStr=<OrderNo>&pmItem=<item>&navModelItemId=MaintainreceivingcostadjflowExternal
```

Parameters:

Parameter	Required	Description
pmOrderNoStr	Yes	Order number for which a cost adjustment will be created.
pmItem	Yes	Item ID that will have its cost adjusted on a PO.

Average Cost Adjustments

When this page is launched, Merchandising will display the average cost adjustment screen with the item and location data defaulted based on the information in the URL.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/Rms/faces/RmsHome?
pmMode=<mode>&pmItem=<item>&pmLocType=<loc_type>&pmLocation=<location&navModelItemId=MaintainAvgCostAdjFlowExt
```

Parameters:

Parameter	Required	Description
pmItem	Yes	Item ID
pmLocType	Yes	Location type - either S (store) or W (warehouse)
pmLocation	Yes	Store or virtual warehouse ID
pmMode	No	The mode in which the screen should be opened. Valid values are EDIT or VIEW.

Allocation

Quick Create

When this page is launched, Allocation will open the Allocation Maintenance page to initiate an allocation with the passed in source type, source ID and item IDs.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/alloc/faces/Home?navModelItemId=quickCreateTF&source=<source>&sourceIdList=<source_list>&itemIdList=<item_list>
```

Parameters:

Parameter	Required	Description
Source	Yes	Should be a valid source type for an allocation - PO, WAREHOUSE, ASN, or BOL
Source ID List	Yes	Should indicate the entity ID that relates to the source. For example, if the source is PO, then this would be one or more purchase order number. If more than one is included, they should be separated by semicolons.
Item List	Yes	Should indicate the items that will be allocated. If more than one is included, they should be separated by semicolons.

Load Allocation

When this page is launched, Allocation will open the allocation included in the URL in edit mode.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/alloc/faces/Home?navModelItemId=loadAllocationTF&allocationId=<alloc_id>
```

Parameters:

Parameter	Required	Description
Allocation	Yes	Valid allocation ID.

Invoice Matching

Summary Match

When this page is launched, Invoice Matching fetches all the invoices and receipts associated with the default match key from the supplier and for the given invoice.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/
ReimViewController/faces/Home?
navModelItemId=SummaryMatchService&supplier=<supplier ID>&invoice=<invoice ID>
```

Parameters:

Parameter	Required	Description
Supplier	Yes	Supplier ID
Invoice	Yes	Invoice or document ID

Discrepancy List Flow

When this screen is launched, Invoice Matching fetches all the discrepant invoices for the given supplier and invoice.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/
ReimViewController/faces/Home?
navModelItemId=DiscrepancyListService&supplier=<supplier ID>&invoice=<invoice ID>
```

Parameters:

Parameter	Required	Description
Supplier	Yes	Supplier ID
Invoice	Yes	Invoice or document ID

Sales Audit

Store Day Search

When this page is launched, Sales Audit will pre-populate the Store Day search based on the parameters included and optionally auto execute the search. Only one store/day combination can be included.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/
ResaPortal/faces/Home?navModelItemId=SearchStoreDayTF?
Store=<storeId>&BusinessDay=<BusinessDay>
```

Parameters:

Parameter	Required	Description
Store	Yes	The ID for a store to include in a search
BusinessDay	Yes	Business day to use in the search in the format DD-MON-RR.

Parameter	Required	Description
AutoExecute	No	Indicates if the query should be automatically executed when the screen is launched or not. Valid values are Y or N.
AssignedStores	No	Filters the returned list to the user's assigned stores (Y) or to the stores not assigned to the user (N).
DataStatus	No	Filters the returned list of store days by data status for one of the following: Fully Loaded (F), Purged (G), Loading (L), Partially Loaded (P), and Ready for Import (R).
OverAllStatus	No	Filters the returned list of store days by overall status for one of the following: Complete (A) or In Progress (I).

Store Day Maintenance

When this page is launched, Sales Audit will display information for the store day based on the parameters included in the URL in edit mode or view mode, depending on the user's privileges.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/
ResaPortal/faces/Home?navModelItemId=MaintainStoreDayTF?
StoreSeqNo=<StoreDaySequenceNo>&Store=<Store ID>&BusinessDate=<BusinessDate>
```

Parameters:

Parameter	Required	Description
StoreSeqNo	Yes	The sequence number for the store day.
Store	Yes	ID for a store
BusinessDate	Yes	Business day to use in the search in the format DD-MON-RR.
TabToDisclose	No	This parameter, if included can indicate that the Over/Short tab should be the focus when the page opens. If this parameter is included, it must have a value of OS, which means that the Over/Short tab will be in focus. Otherwise, the focus will be on the error list.

Transaction Maintenance

When this page is launched, Sales Audit will display information for the transaction sequence number included in the URL in edit mode or view mode, depending on the user's privileges.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/
ResaPortal/faces/Home?navModelItemId=MaintainTransactionTF?
TransactionSeqNo=<TransactionSeqNo>
```

Parameters:

Parameter	Required	Description
TransactionSeqNo	Yes	The sequence number for the transaction.

Transaction Search

When this page is launched, Sales Audit will pre-populate the Transaction search based on the parameters included and optionally auto execute the search. Only a single transaction sequence can be sent.

URL:

```
https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/ResaPortal/faces/Home?navModelItemId=ManageTransactionTF?TransactionSeq=<TransactionSeq>&Store=<StoreID>&TranBusinessDate=<TranBusinessDate>
```

Parameters:

Parameter	Required	Description
TransactionSeq	Yes	The sequence number for the transaction.
StoreId	Yes	The ID of a store to include in the search.
TranBusinessDate	Yes	The business date to use in the search in the format in the format DD-MON-RR.
ErrorExists	No	If included, filters the returned list to transactions with errors (Y) or without (N).
AutoExecute	No	Indicates if the query should be automatically executed when the screen is launched or not. Valid values are Y or N.

5

Merchandising Style Guide

This section outlines the styles used in developing the Merchandising solution user interfaces. It is included here so that you can use the information for any custom reports or bolt-on applications to give them a similar look and feel, providing a more seamless experience for your users.

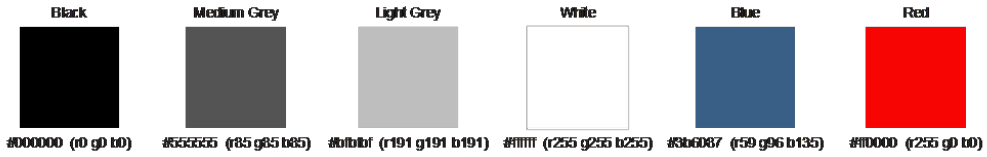
Fonts

The primary typeface that is used for the UI is Arial, with Helvetica used for some of the headings.

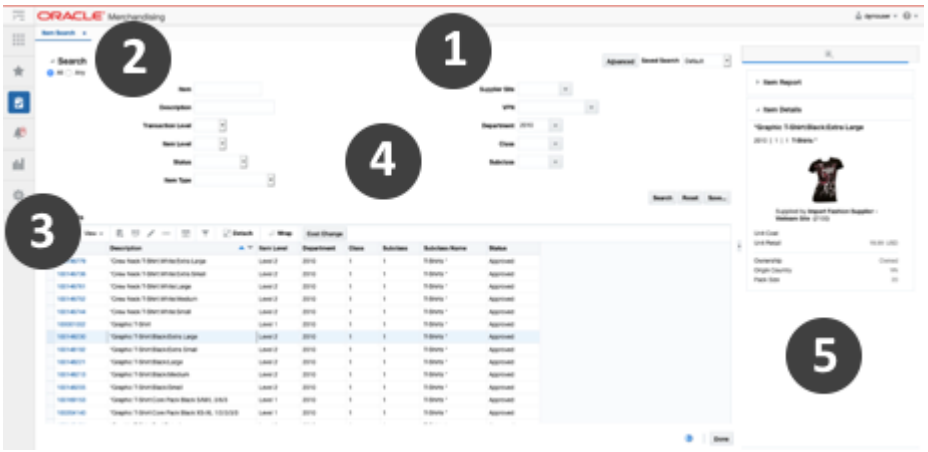
Type Style	Type Styling Details
Headline 1 (H1)	18px, Bold, #252525 (r37 g37 b37)
Headline 2 (H2)	15px, Bold, #252525 (r37 g37 b37)
Headline 3 (H3)	13px, Bold, #252525 (r37 g37 b37)
Headline 4 (H4)	13px, Bold, #252525 (r37 g37 b37)
Headline 5 (H5)	12px, Bold, #252525 (r37 g37 b37)
HEADLINE 6 (H6)	12px, Regular, #252525 (r37 g37 b37), Uppercase
Panel Header / Panel Window Titles	13px, Bold, #000000 (r0 g0 b0)
Body Text	12px, #000000 (r0 g0 b0), line-height: 16px
Field Label	12px, Bold, #000000 (r0 g0 b0)
Standard Link State / Hover	12px, #145c9e (r20 g92 b158); Hover: underlined
Ouput Text	12px, #7676 76, r 118g118b118

Colors

These are the colors used in the UIs. Which colors apply for which components is described below.



Global Screen Structure



All the screens in Merchandising have a similar layout, with these main key areas:

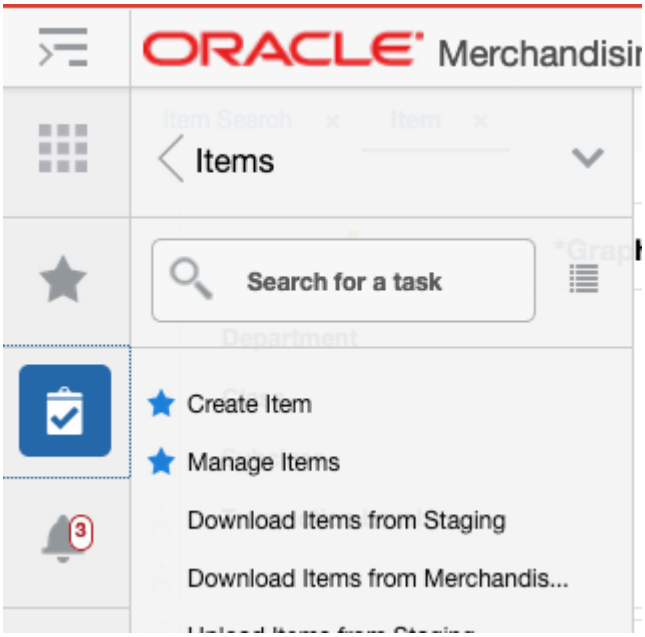
1. Global Navigation Bar
2. Application Tabs
3. Navigational Area
4. Local Area
5. Contextual Area

Global Navigation Bar

The global navigation bar shows the name of the solution and also contains the user menu and a global help icon. The makeup of this bar is as follows:

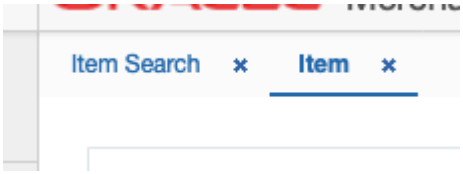
Components	Font	Background Color	Size
Top Border		Red	Height: 2 pixels
Main Section	Application title: Headline 1	Light Gray	Height: 42 pixels
Bottom Border		Medium Gray	Height: 1 pixel

Application Menu Bar



Components	Font	Background Color	Size
Menu Button section	N/A	Light Gray	Width: 40 pixels
Fly-out Menu	Body Text	Light Gray	Width: 250 pixels

Application Tabs



Components	Font	Background Color	Size
Active tab	Standard Link State, Bold	White Border: Blue	Height: 30 pixels (border 3 pixels) Width: minimum 80 pixels
Inactive tab	Standard Link State	White	Height: 30 pixels (no border) Width: minimum 80 pixels

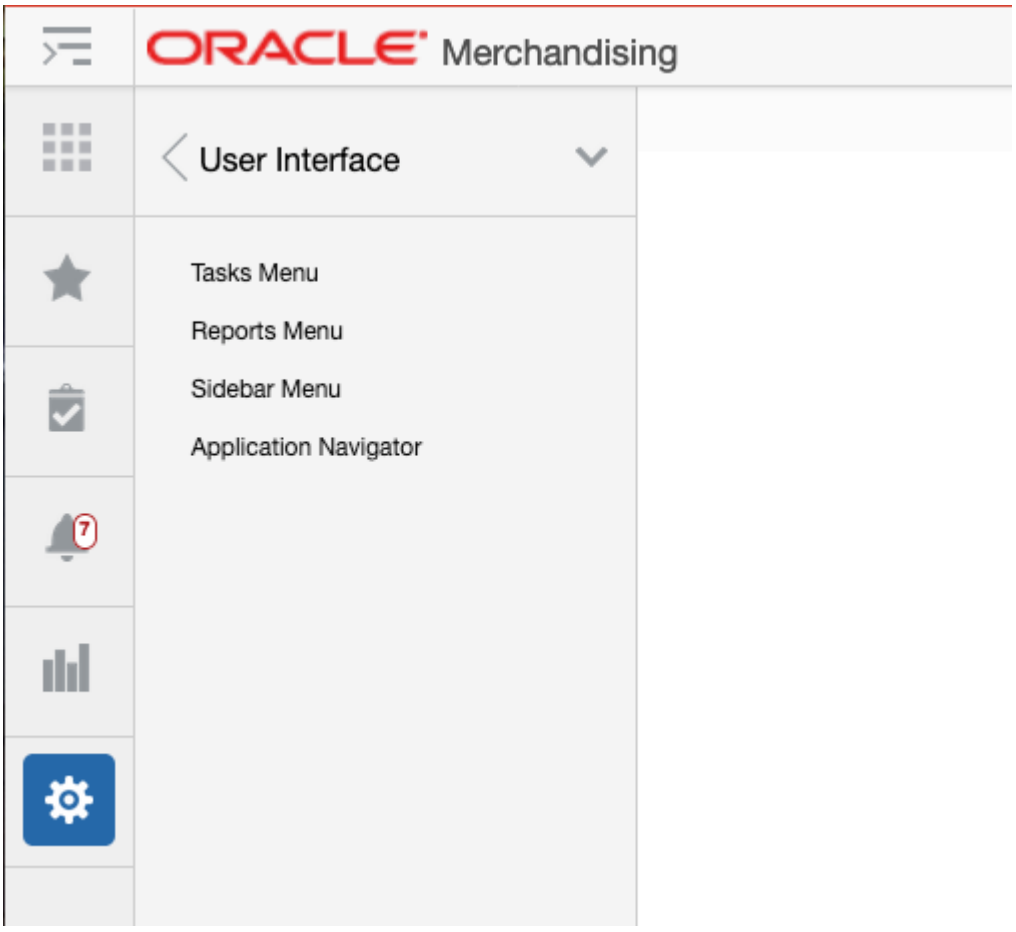
6

Application Customization

The Merchandising suite provides different options for customizing the user interface to meet your business practices, and in some cases to surface custom content. This includes adding links to custom workflows or reports in the Tasks menu, adding custom reports to dashboards or contextual panes, and customizing the labels used in the solutions. These options are accessed from the Settings icon in the sidebar menu in each of the Merchandising solutions.

User Interface

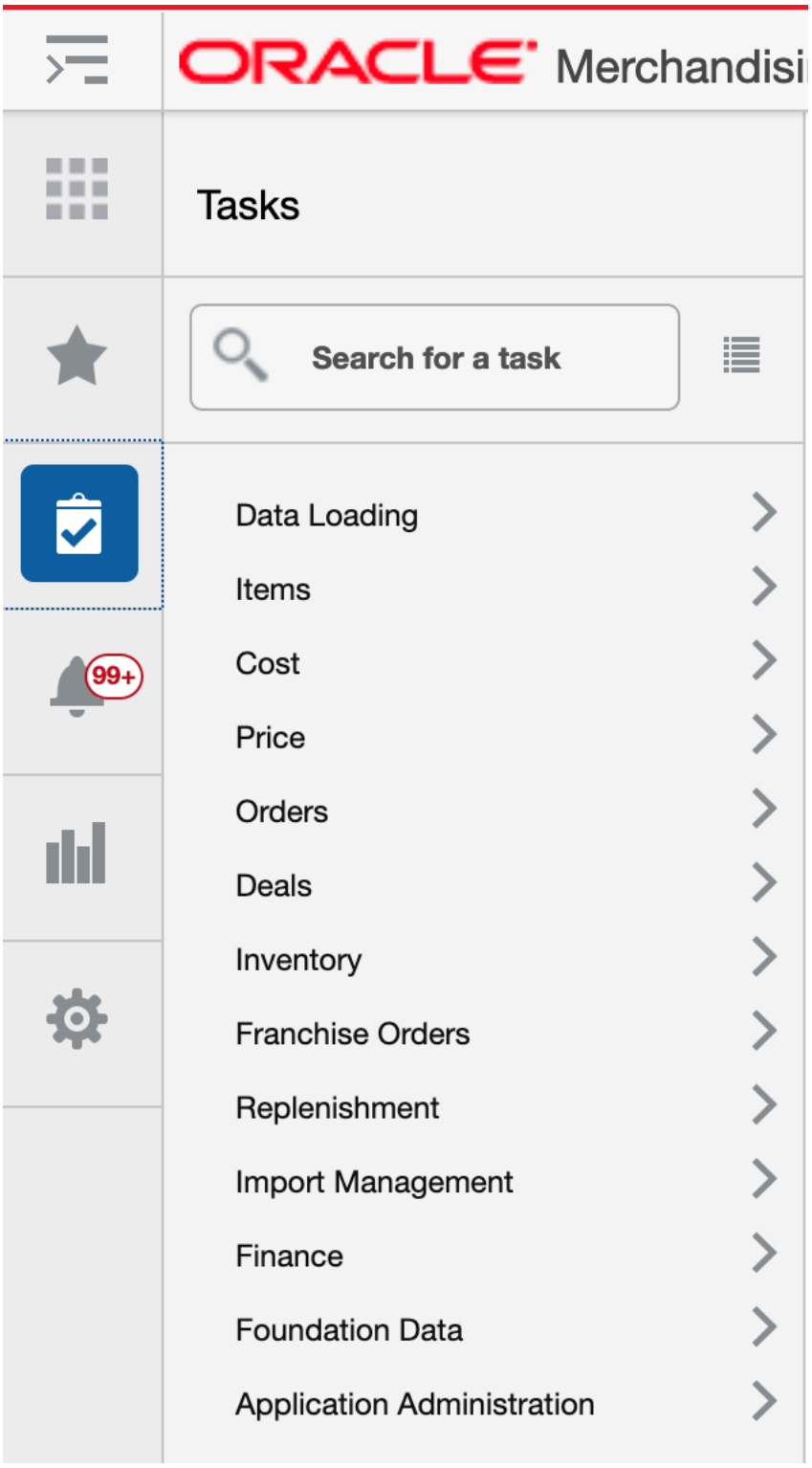
User interface customization is an option that can be used to customize the look and feel of the tasks, reports menu, and sidebar menus and which applications are shown in the Application Navigator.



Tasks Menu

The Tasks Menu link opens the Tasks Menu page, which allows an administrator can add, modify or remove the tasks available. For example, you may want to add a link for your users to a custom bolt-on application. You can also add a new folder and re-organize how the base task links are organized.

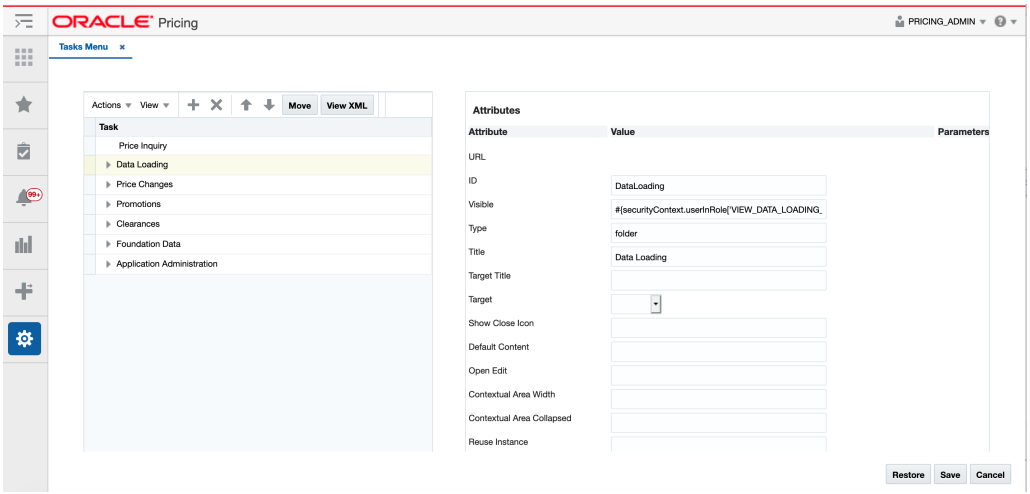
Figure 6-1 Base Merchandising Tasks Menu



Clicking on the Task Menu option under Settings displays a page like is shown below. On this page are buttons to save, restore or cancel the changes.

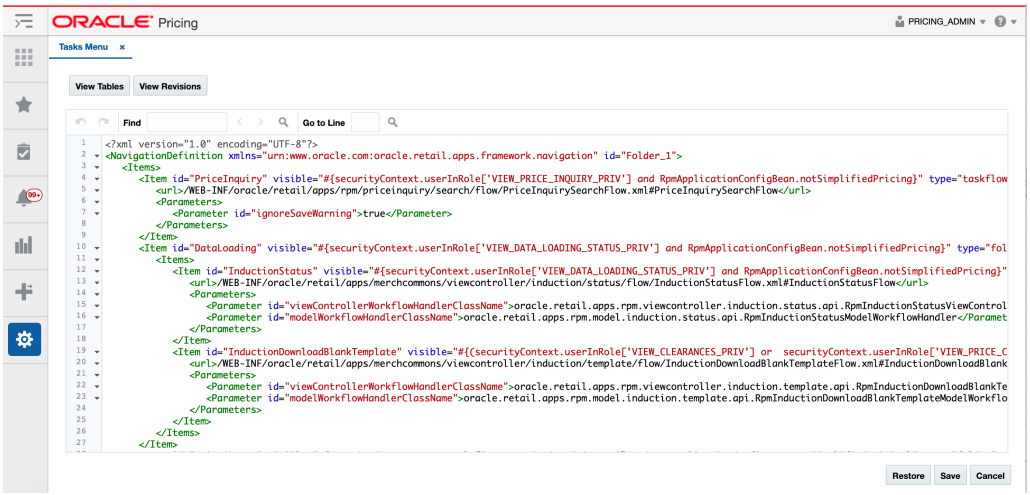
When you click **Save**, your changes will be immediately reflected in the Tasks menu. The **Cancel** button closes the tab without saving the changes. The **Restore** button replaces the customized menu with the with the base product configuration.

Figure 6-2 Table View



You can also click on the **View XML** button to view the XML version of the menu in an XML editor. The XML view contains a **View Tables** button which takes the user back to the tables view. The XML view also has a **View Revisions** button that allows you to view prior revisions of the task list. This should be used to re-apply any customizations you make after a patch is applied, as customizations are not retained during patching.

Figure 6-3 XML View



The task menu model xml file uses the xml schema definition called NavigationModel.xsd for xml validation. The Navigation Model schema definition file is used to validate any changes done by the administrator on the task menu xml file. The task menu model file consists of a hierarchy of item elements. Each element

represents a menu item in the task menu. The item element can either be a folder or a URL, with a list of attributes and parameters that identify the task menu item.

Below is the example of a task menu model item:

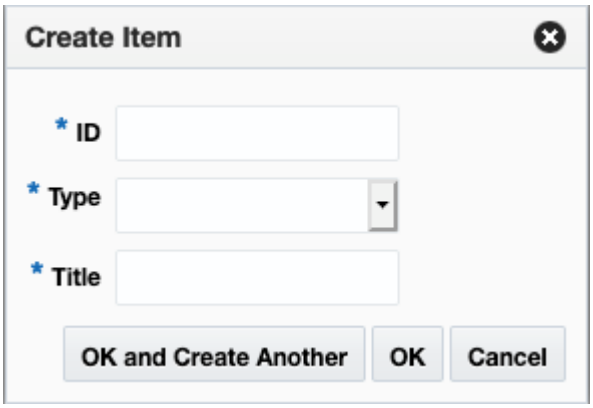
```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<NavigationDefinition … >
   <Items>
      <Item id="myFolder" title="My Folder" type="folder">
         <Items>
            <Item id="myContent" type="link" title="My Content" target="_blank"
refreshOnDisclosure="false" dynamicTabFocus="true" closeOverride="false"
reloadTab="false" popupContentHeight="250" popupContentWidth="250"
popupStretchChildren="none" popupResize="on" popupId="0" renderIconTitle="textOnly"
modulePathActiveValidation="all">
               <url>http://<xyz>.com</url>
            </Item>
         </Items>
      </Item>
   </Items>
</NavigationDefinition>
```

Add New Task Menu Items

In cloud service implementations, there are two types of task menu items that can be added - a folder or a link.

Add a New Task Link

To add a new task link, starting from the Tasks Menu page, select the folder in the Task table where you want your link displayed. For example, if you want to add a new link under Items in Merchandising, highlight the Items row in the Task table. Then, click the Create iconic button () or select Create from the Actions menu. Or, if you don't want it displayed in an existing folder, then select the Create On Top option from the Actions menu. Both options will result in a popup being displayed like shown below.



In the popup, give your link a unique ID, select the type link, and enter a business facing title. Then click **OK**. You should now see the new link item in the Task table. To rearrange the order that the link is displayed in the folder click on the up and down arrows () in the Task table toolbar or click on the **Move** button, which will allow you to select another folder to which to move your link.

Next, you will need to configure your link using the Attributes panel. Alternatively, you can click on the View XML option and configure your link. The following attributes apply for task links:

Attribute	Description
URL	The full URL for your link. If you are adding the link using the View XML option, the entire URL must be marked as character data (e.g. enclosed in CDATA).
ID (id)	Unique identifier for menu items. When adding your custom link, make sure that it does not duplicate any of the base IDs.
Visible (visible)	Indicates if the item should be rendered (visible) or not. Valid values are true (default) or false. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings to determine the visibility of your link. For example, if you want your link only visible to users with the Maintain Items privilege, then you can use the ADF securityContext API isUserInRole method and set this to #{securityContext.userInRole['MAINTAIN_ITEMS_PRIV']}.
Type (type)	Indicates the type of the item. Valid values are: • folder - indicates that the item contains additional sub-navigation items • link - used for URLs An additional type (taskflow and dynamicContent) is not supported in SaaS implementations for the Task List.
Title (title)	Used to provide the user-facing title of the task item in the primary language. Required.
Target (target)	For custom links, one of the following target types can be selected: • _blank: renders the URL in a new browser tab • _self: opens the custom link on top of the Merchandising screen; overwriting the application screen • _top: same behavior as _self
Access Key (accessKey)	Optional. Used to specify the keyboard keystroke or a group of keystrokes that are used to access the navigation item using the keyboard.
Short Description (shortDesc)	Optional. Used to provide the description of the navigation item which will be displayed when the user hovers over a menu item.

The other attributes in the Tasks Menu page do not apply for custom task menu links.

Add a New Folder

To add a new sub-folder, starting from the Tasks Menu page, select the folder in the Task table where you want your sub-folder displayed. For example, if you want to add a new subfolder under Inventory in Merchandising, highlight the Inventory row in the

Task table. Then click the Create iconic button ( ) or select Create from the Actions menu. Or, if you don't want to add your folder in an existing folder, select the option Create On Top from the Actions menu. Both options will result in a popup being displayed like shown below.

In the popup, give your folder a unique ID and enter a user-facing title. Also, select the type folder. Then click OK. You should now see the new folder in the Task table. You can optionally also configure the attributes in the Attribute panel, or using the View

XML option. The parameters for folders are similar to those described above for adding task links.

To rearrange the order that the subfolder is displayed in the selected folder, click on the up and down arrows () in the Task table toolbar or click on the Move button, which will allow you to select another folder to which to move your folder.

To move links into this new folder, follow the steps in Modify an Existing Task. To add new tasks to this folder, follow the steps in Add a New Task Link.

Modify an Existing Task

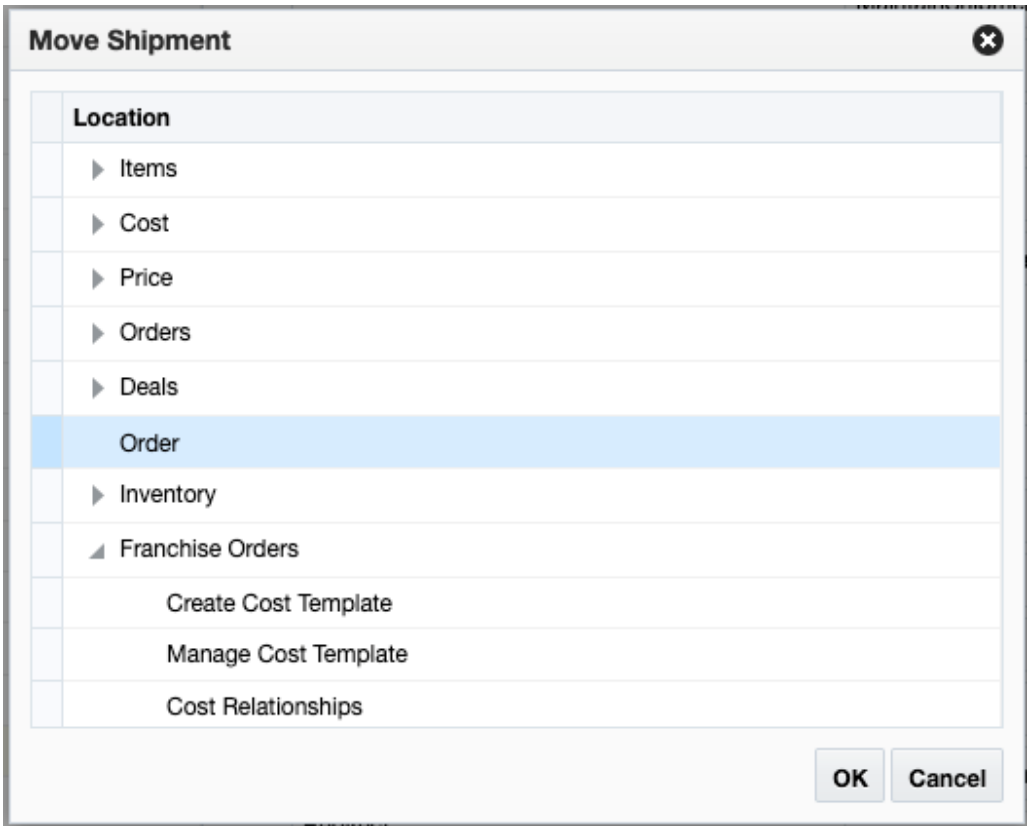
If you need to modify a custom link or folder you added previously, you can also do that in the Tasks Menu page. Also, there are some changes you can make to base links in this view, with limitations.

Rearrange Folders or Links

If you want to rearrange the order of folders or links (base or custom), highlight the link or folder to be moved in the Task table of the Tasks Menu page. Then, click on the up or down arrows () in the Task table toolbar to move the link or folder up or down within the same parent folder.

Move Folder or Link to New Folder

If you want to move a link or folder (base or custom) to a different parent folder, then highlight the link or folder to be moved in the Task table of the Tasks Menu page. Then, click the Move button in the Task table toolbar. This will open a popup where you can select the new parent folder for your folder or link.



If you want to move your item to the top level so that it isn't inside of a parent folder, then select Move On Top from the Actions menu.

Modify Link Attributes

If you want to modify the attributes for your custom link or folder, you can do that by highlighting the appropriate link or folder in the Task table of the Tasks Menu page and editing the attributes similar to what was described in the Add New Task Menu Items section.

You can also do some limited editing of the attributes for base task list links or folders. The attributes that can be modified for a base task link or folder are described in the table below.

Attribute	Description
Visible (visible)	Indicates if the item should be rendered (visible) or not. Valid values are true (default) or false. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings to determine the visibility of your link. For example, if you want your link only visible to users with the Maintain Items privilege, then you can use the ADF `securityContext` API `isUserInRole` method and set this to `#{securityContext.userInRole['MAINTAIN_ITEMS_PRIV']}`. Customizing this for base links should be done only in exceptional situations. Best practice is to control visibility for base links and folders based on the privileges assigned to your user's roles, or using system options settings. For more details on the privileges that control the base links and folders, see the *Security Guide - Volume 2* for the applicable Merchandising solution.
Title (title)	Used to provide the user-facing title of the task item in the primary language. Required.
Default Content (defaultContent)	Indicates whether the corresponding link is displayed by default in the content area when the application is launched. This could be used to display one of the base workflows by default to a user when they log into a Merchandising solution. Valid values are true (default) or false. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings, similar to the Visible attribute. This attribute is not applicable for base folders or custom links/folders.
Access Key (accessKey)	Optional. Used to specify the keyboard keystroke or a group of keystrokes that are used to access the navigation item using the keyboard.
Short Description (shortDesc)	Optional. Used to provide the description of the navigation item which will be displayed when the user hovers over a menu item.

The other attributes in the Tasks Menu page do not apply for modifying base task menu links.

Remove a Task

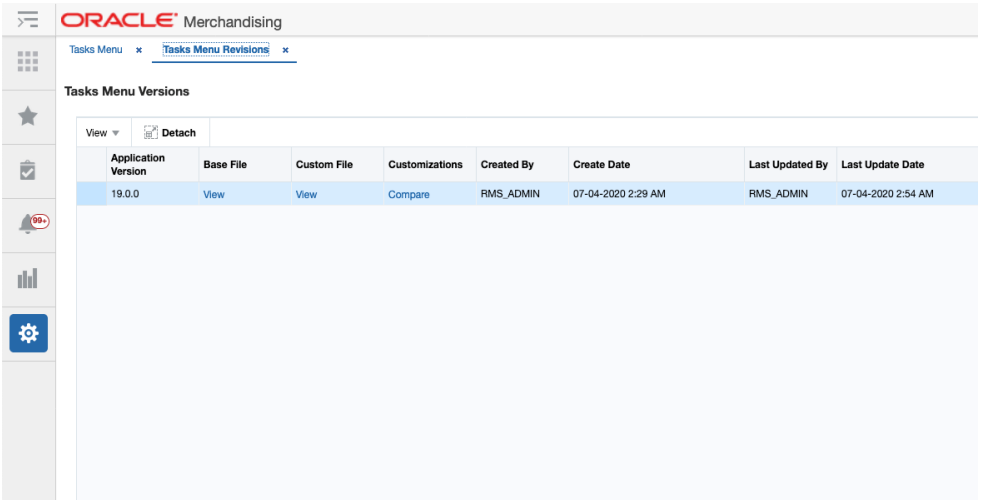
If you want to remove a custom task link or folder that you previously added, then highlight the link or folder in the Task table of the Tasks Menu page and click on the delete iconic button ( ) or select Delete from the Actions menu.

> **Note:**
>
> It is highly recommended that you don't delete any of the base task links.

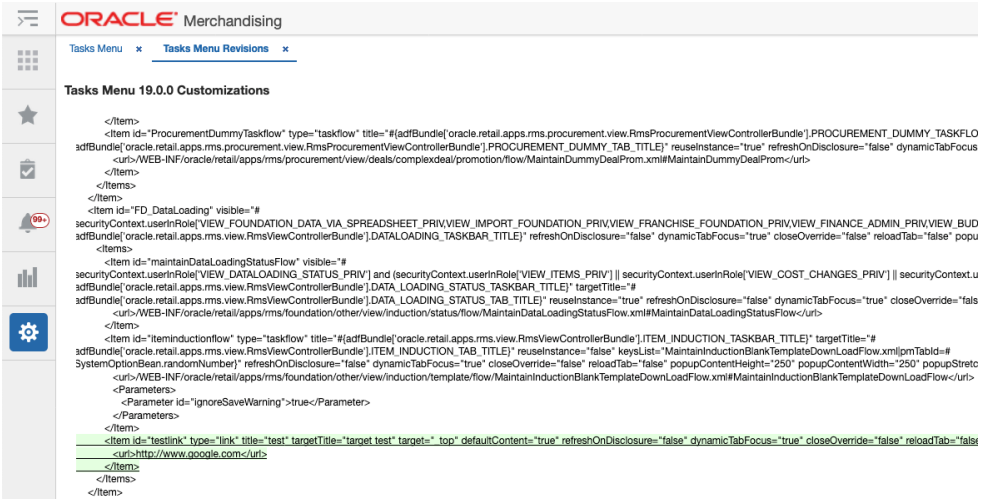
Re-apply Task Customizations After Patching

If you have made any customizations to the Tasks menu, then after a patch update, the changes will be lost. To re-apply your changes after patch updates, follow these steps:

1. From the Settings menu, select **User Interface > Tasks Menu**.
2. Click the **View XML** button, and then from the XML view, select **View Revisions**.
3. This will open the Tasks Menu Versions page.



4. From here, you can view the base version, your customized version, or a comparison of the two. The comparison view highlights your additions and subtractions from the base model, as you can see in the example below.

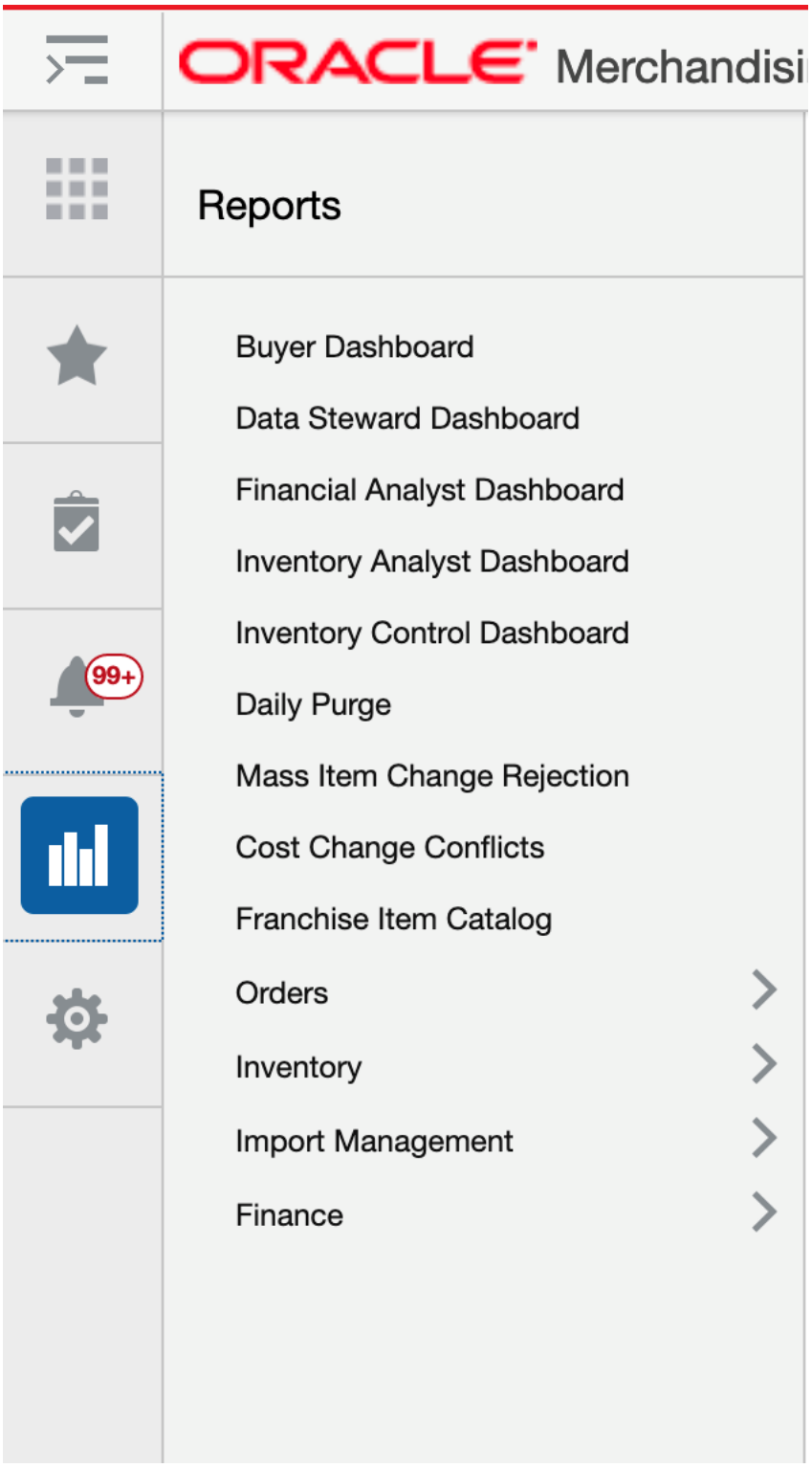


5. Note the customizations made - you may want to copy to a text editor, highlighting the changes as appropriate - and then click **Back** to return to the Task Menu Versions page.
6. Click **Cancel** to return to the Task Menu XML View page. Using the highlighted differences from the revision page, reapply your customizations. Then, click Save.
7. Click on the Tasks menu icon () to validate that your changes have been re-applied.

Reports Menu

The Reports Menu link opens the Reports Menu page that allows you to add, modify or remove the reports available in the Reports menu. For example, if you have built some custom reports using BI Publisher, you might add the links using this function.

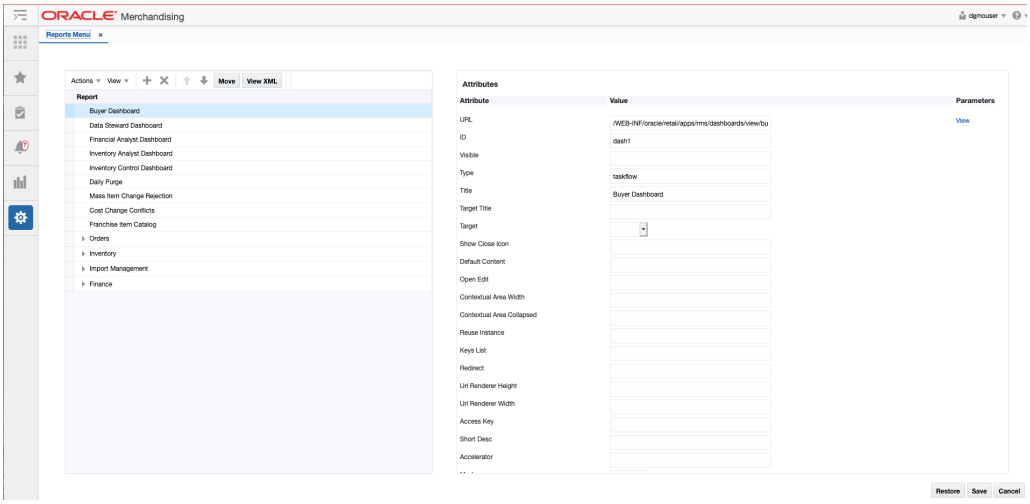
Figure 6-4 Base Merchandising Reports Menu



Clicking on the Reports Menu option under Settings displays a page like is shown below. On this page are buttons to save, restore or cancel the changes.

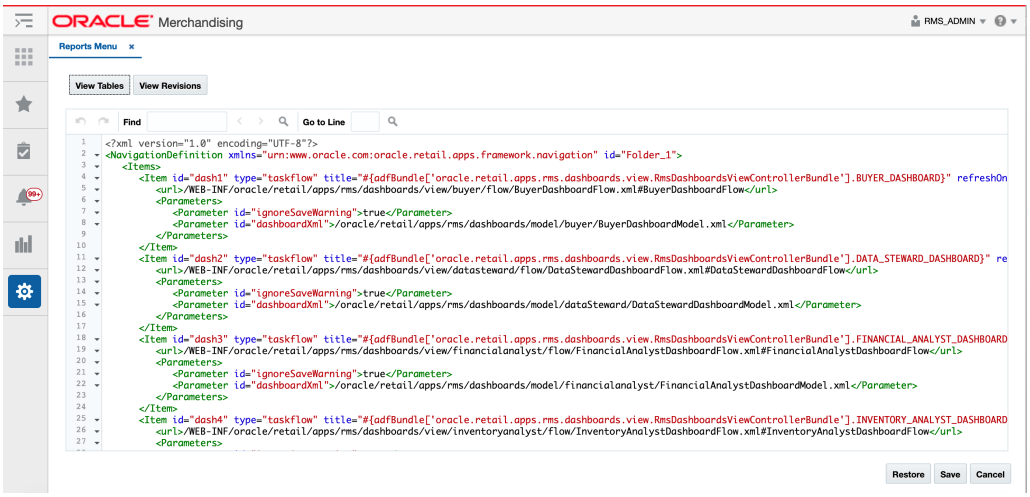
When you click **Save**, your changes will be immediately reflected in the Reports menu. The **Cancel** button closes the tab without saving the changes. The **Restore** button replaces the customized menu with the with the base product configuration.

Figure 6-5 Table View



You can also click on the **View XML** button to view the XML version of the menu in an XML editor. The XML view contains a **View Tables** button which takes the user back to the tables view. The XML view also has a **View Revisions** button that allows you to view prior revisions of the reports list. This should be used to re-apply any customizations you make after a patch is applied, as customizations are not retained during patching.

Figure 6-6 XML View



The Reports menu customization is similar to that used for the Tasks menu. The Reports menu model file consists of a hierarchy of item elements. Each element

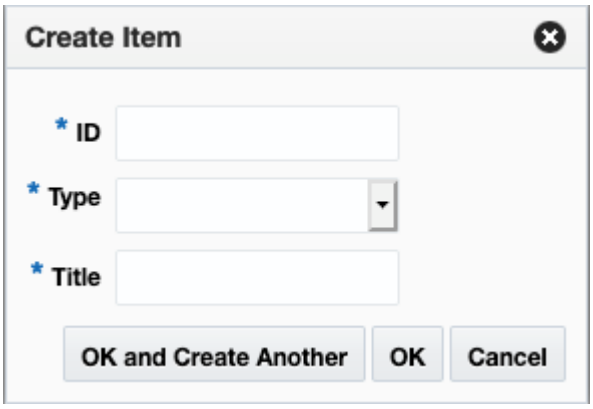
represents a menu item in the Reports menu. The item element can either be a folder or a URL, with a list of attributes and parameters that identify the task menu item.

Add New Report Menu Items

In cloud service implementations, there are two types of report menu items that can be added - a folder or a link.

Add a New Report Link

To add a new report link, starting from the Reports Menu page, select the folder in the Report table where you want your link displayed. For example, if you want to add a new link under the Finance folder in Merchandising, highlight the Finance row in the Report table. Then, click the Create iconic button ( ) or select Create from the Actions menu. Or, if you don't want it displayed in an existing folder, then select the Create On Top option from the Actions menu. Both options will result in a popup being displayed like shown below.



In the popup, give your link a unique ID, select the type **link**, and enter a business facing title. Then click **OK**. You should now see the new link item in the Report table. To rearrange the order that the link is displayed in a folder click on the up and down arrows ( ) in the Report table toolbar or click on the **Move** button, which will allow you to select another folder to which to move your link.

Next, you will need to configure your link using the Attributes panel. Alternatively, you can click on the View XML option and configure your link. The following attributes apply for report links:

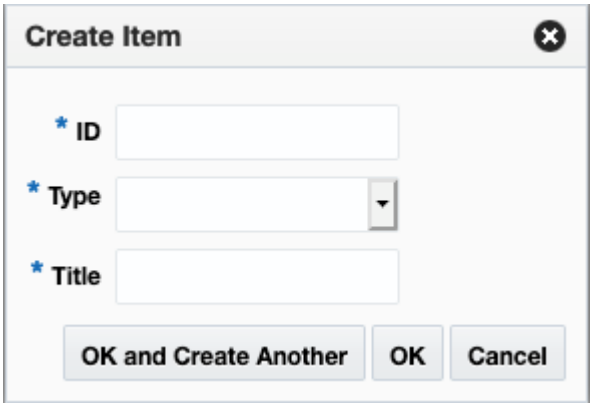
Attribute	Description
URL	The full URL for your link. If you are adding the link using the View XML option, the entire URL must be marked as character data (e.g. enclosed in CDATA).
ID (id)	Unique identifier for menu items. When adding your custom link, make sure that it does not duplicate any of the base IDs.

Attribute	Description
Visible (visible)	Indicates if the item should be rendered (visible) or not. Valid values are true (default) or false. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings to determine the visibility of your link. For example, if you want your link only visible to users with the Maintain Items privilege, then you can use the ADF `securityContext` API `isUserInRole` method and set this to `#{securityContext.userInRole['MAINTAIN_ITEMS_PRIV']}`.
Type (type)	Indicates the type of the item. Valid values are: • folder - indicates that the item contains additional sub-navigation items • link - used for URLs An additional type (taskflow and dynamicContent) is not supported in SaaS implementations for the Report List.
Title (title)	Used to provide the user-facing title of the report link in the primary language. Required.
Target (target)	For custom links, one of the following target types can be selected: • _blank: renders the URL in a new browser tab • _self: opens the custom link on top of the Merchandising screen; overwriting the application screen • _top: opens the custom link on top of the Merchandising screen; overwriting the application screen
Access Key (accessKey)	Optional. Used to specify the keyboard keystroke or a group of keystrokes that are used to access the navigation item using the keyboard.
Short Description (shortDesc)	Optional. Used to provide the description of the navigation item which will be displayed when the user hovers over a menu item.

The other attributes in the Report Menu page do not apply for custom menu links.

Add a New Folder

To add a new sub-folder, starting from the Report Menu page, select the folder in the Report table where you want your sub-folder displayed. For example, if you want to add a new subfolder under the Orders folder in Merchandising, highlight the Orders row in the Report table. Then click the Create iconic button ( ) or select Create from the Actions menu. This will result in a popup being displayed like shown below.



In the popup, give your folder a unique ID and enter a user-facing title. Also, select the type folder. Then click OK. You should now see the new folder in the Report table. You can optionally also configure the attributes in the Attribute panel, or using the View XML option. The parameters for folders are similar to those described in "Add a New Report Link".

To rearrange the order that the subfolder is displayed in the selected folder, click on the up and down arrows () in the Report table toolbar or click on the Move button, which will allow you to select another folder to which to move your folder.

To move links into this new folder, follow the steps in "Modify an Existing Report". To add new reports to this folder, follow the steps in "Add a New Report Link".

Modify an Existing Report

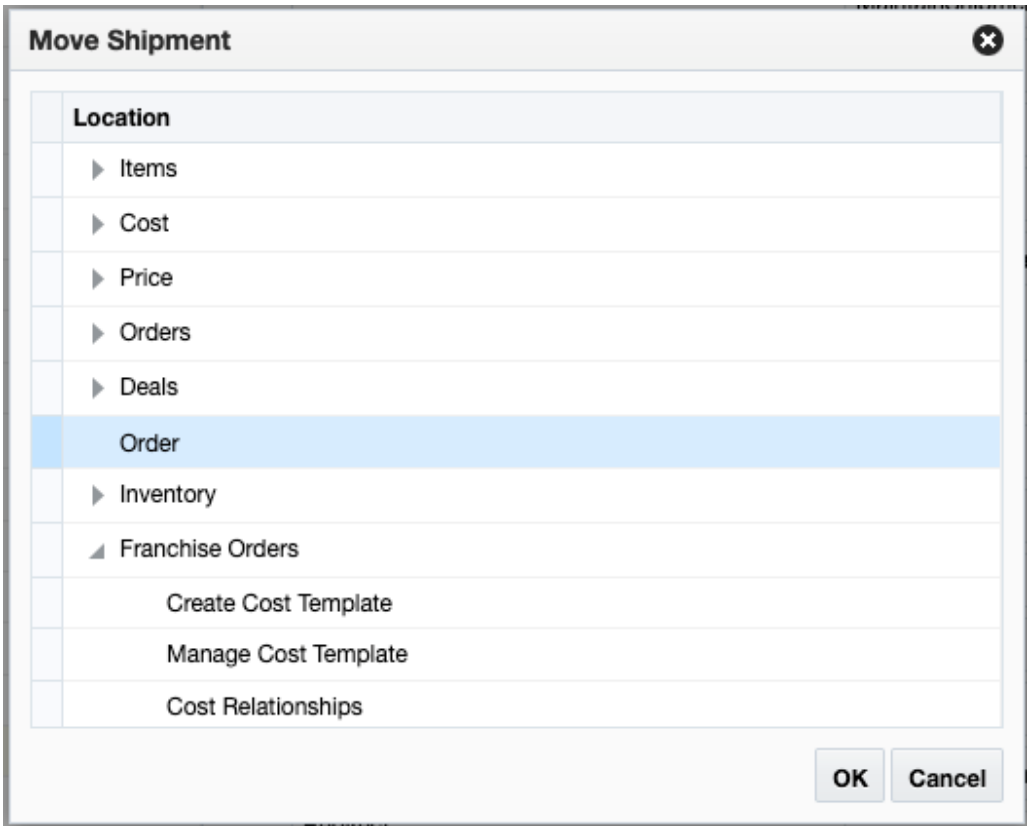
If you need to modify a custom link or folder you added previously, you can also do that in the Report Menu page. Also, there are some changes you can make to base links in this view, with limitations.

Rearrange Folders or Links

If you want to rearrange the order of folders or links (base or custom), highlight the link or folder to be moved in the Report table of the Reports Menu page. Then, click on the up or down arrows () in the Report table toolbar to move the link or folder up or down within the same parent folder.

Move Folder or Link to New Folder

If you want to move a link or folder (base or custom) to a different parent folder, then highlight the link or folder to be moved in the Report table of the Reports Menu page. Then, click the Move button in the Report table toolbar. This will open a popup where you can select the new parent folder for your folder or link.



Modify Link Attributes

If you want to modify the attributes for your custom link or folder, you can do that by highlighting the appropriate link or folder in the Report table of the Reports Menu page and editing the attributes similar to what was described in the "Add New Report Menu Items" section.

You can also do some limited editing of the attributes for base report links or folders. The attributes that can be modified for a base report link or folder are described in the table below.

Attribute	Description
Visible (visible)	Indicates if the item should be rendered (visible) or not. Valid values are true (default) or false. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings to determine the visibility of your link. For example, if you want your link only visible to users with the Maintain Items privilege, then you can use the ADF `securityContext` API `isUserInRole` method and set this to `#{securityContext.userInRole['MAINTAIN_ITEMS_PRIV']}`. Customizing this for base links should be done only in exceptional situations. Best practice is to control visibility for base links and folders based on the privileges assigned to your user's roles, or using system options settings. For more details on the privileges that control the base links and folders, see the *Security Guide - Volume 2* for the applicable Merchandising solution.

Attribute	Description
Title (title)	Used to provide the user-facing title of the report item in the primary language. Required.
Default Content (defaultContent)	Indicates whether the corresponding link is displayed by default in the content area when the application is launched. This could be used to display one of the base reports or dashboards by default to a user when they log into a Merchandising solution. Valid values are true (default) or false. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings, similar to the Visible attribute. This attribute is not applicable for base folders or custom links/folders.
Access Key (accessKey)	Optional. Used to specify the keyboard keystroke or a group of keystrokes that are used to access the navigation item using the keyboard.
Short Description (shortDesc)	Optional. Used to provide the description of the navigation item which will be displayed when the user hovers over a menu item.

The other attributes in the Report Menu page do not apply for modifying base task menu links.

Remove a Report

If you want to remove a custom report link or folder that you previously added, then highlight the link or folder in the Report table of the Reports Menu page and click on the delete iconic button ( ) or select Delete from the Actions menu.

> **Note:**
>
> It is highly recommended that you don't delete any of the base report links.

Re-apply Report Customizations After Patching

If you have made any customizations to the Reports menu, then after a patch update, the changes will be lost. To re-apply your changes after patch updates, follow these steps:

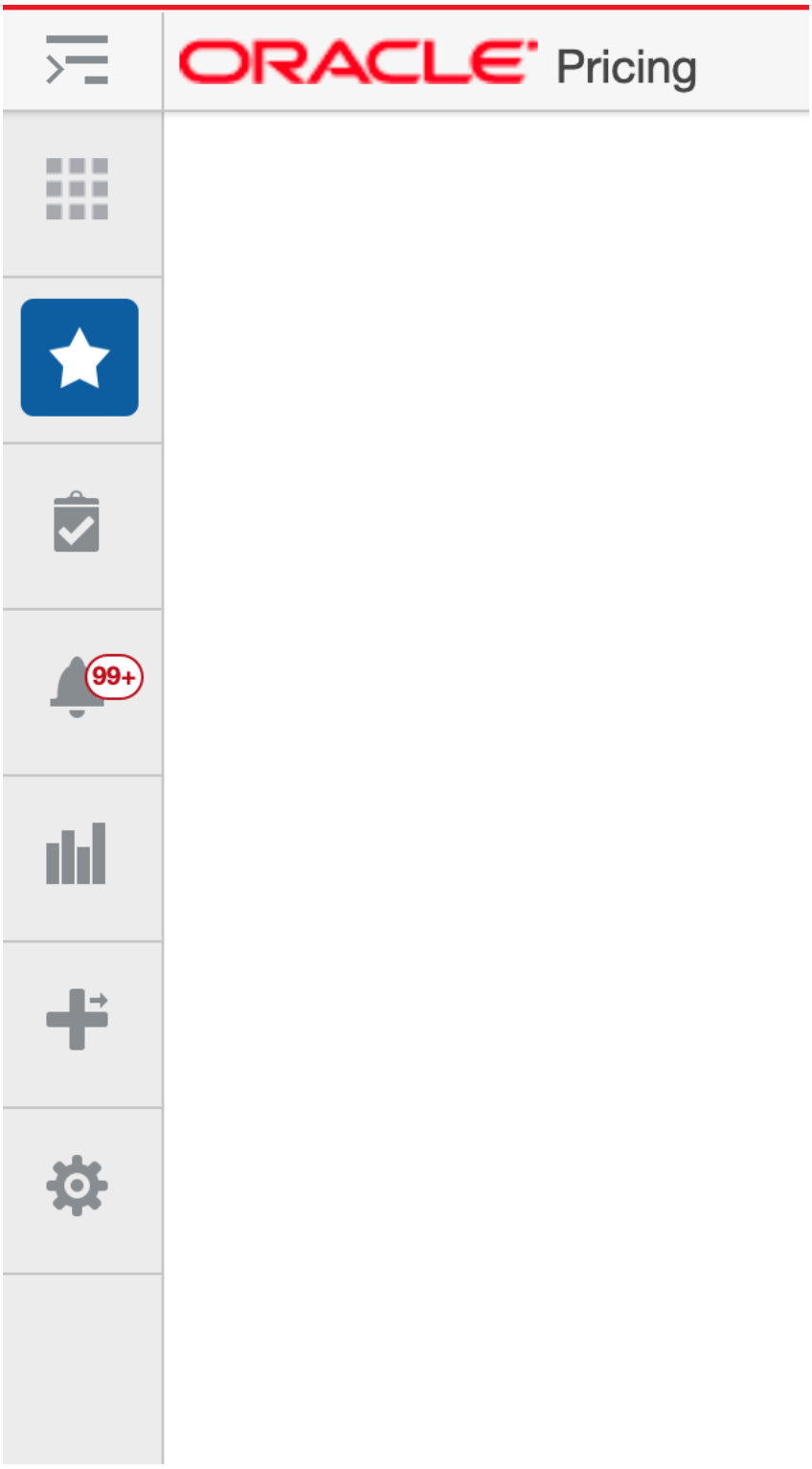
1. From the Settings menu, select **User Interface > Reports Menu**.
2. Click the **View XML** button, and then from the XML view, select **View Revisions**.
3. This will open the Reports Menu Versions page.
4. From here, similar to the Tasks menu, you can view the base version, your customized version, or a comparison of the two. The comparison view highlights your additions and subtractions from the base model.
5. Note the customizations made - you may want to copy to a text editor, highlighting the changes as appropriate - and then click **Back** to return to the Report Menu Versions page.
6. Click **Cancel** to return to the Report Menu XML View page. Using the highlighted differences from the revision page, reapply your customizations. Then, click **Save**.

7. Click on the Reports menu icon () to validate that your changes have been re-applied.

Sidebar Menu

The Sidebar Menu link opens a page that allows you to modify or remove the icons available in the sidebar menu for Merchandising solutions. For example, you could hide the Quick Create option in Allocation or Pricing if you are not using that functionality.

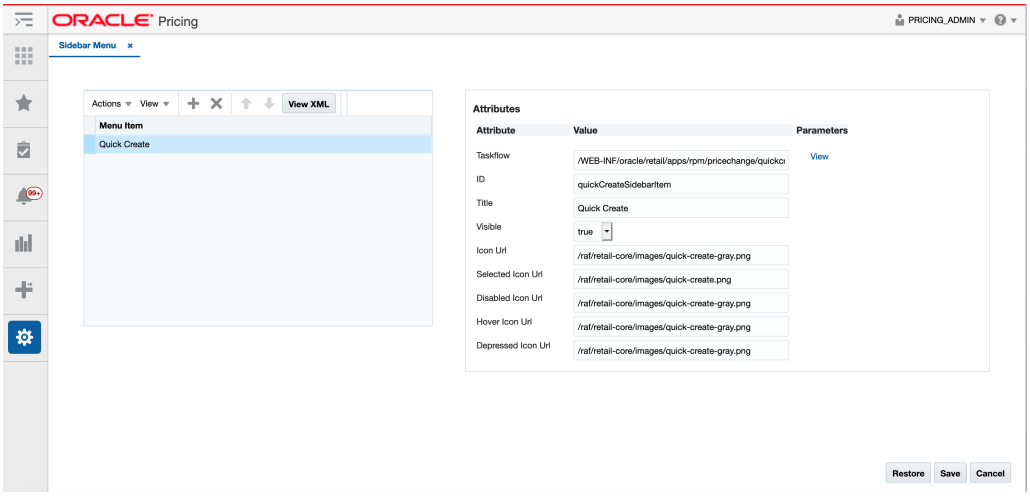
Figure 6-7 Sidebar Menu



Clicking on the Sidebar Menu option under Settings displays a page like is shown below. On this page are buttons to save, restore or cancel the changes.

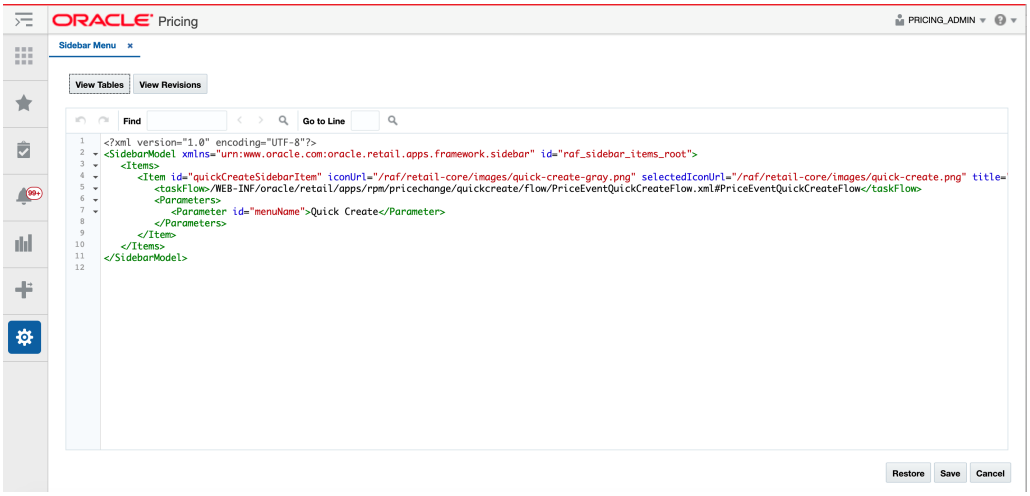
When you click **Save**, your changes will be immediately reflected in the Sidebar menu. The **Cancel** button closes the tab without saving the changes. The **Restore** button replaces the customized menu with the with the base product configuration.

Figure 6-8 Table View



You can also click on the **View XML** button to view the XML version of the menu in an XML editor. The XML view contains a **View Tables** button which takes the user back to the tables view. The XML view also has a **View Revisions** button that allows you to view prior revisions of the Sidebar. This should be used to re-apply any customizations you make after a patch is applied, as customizations are not retained during patching.

Figure 6-9 XML View



Modify a Sidebar Icon

The base icons for Settings, Reports, Notifications, Tasks, and Favorites are not able to be modified. However, for Pricing, Invoice Matching, and Allocation, which have a

Quick Create or Quick Match option, you are able to configure in the Sidebar Menu page. To modify the base settings, from the Settings menu, select User Interface > Sidebar Menu. Highlight the base icon to modify in the table on the left side of the page. Then, in the attributes on the right side of the page, you can do the following:

- Update the title displayed when a user hovers over the icon
- Update the visible attribute to determine whether or not it should be displayed (valid values are true or false)

Remove a Sidebar Icon

It is highly recommended that you don't delete the base sidebar icons.

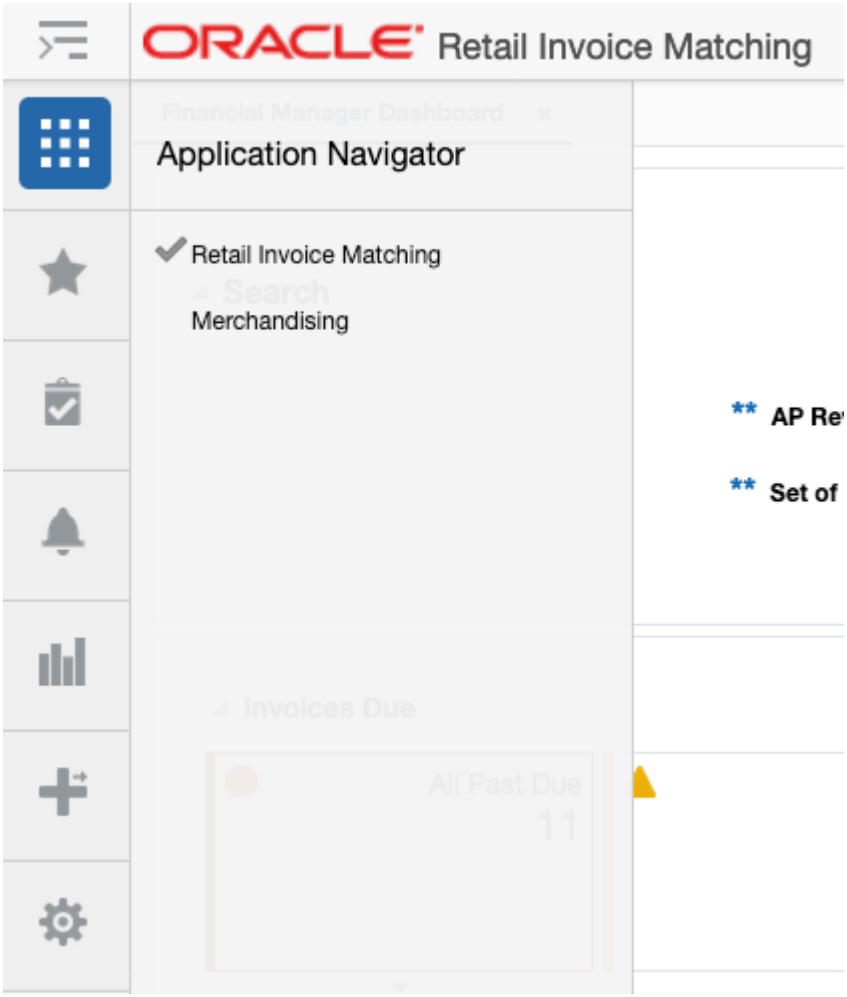
Re-apply Sidebar Customizations After Patching

If you have made any customizations to the Sidebar, then after a patch update, the changes will be lost. To re-apply your changes after patch updates, follow these steps:

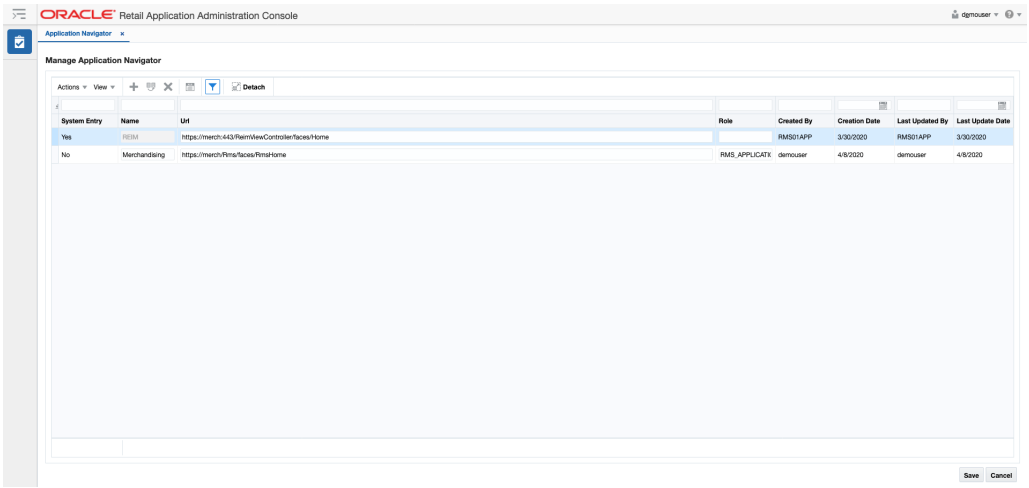
1. From the Settings menu, select **User Interface > Sidebar Menu**.
2. Click the **View XML** button, and then from the XML view, select **View Revisions**.
3. This will open the Sidebar Menu Versions page.
4. From here, similar to the Tasks menu, you can view the base version, your customized version, or a comparison of the two. The comparison view highlights your additions and subtractions from the base model.
5. Note the customizations made - you may want to copy to a text editor, highlighting the changes as appropriate - and then click **Back** to return to the Sidebar Menu Versions page.
6. Click **Cancel** to return to the Sidebar Menu XML View page. Using the highlighted differences from the revision page, reapply your customizations. Then, click **Save**. The changes should be immediately applied to the sidebar menu.

Application Navigator

The Application Navigator allows users to launch different applications from the Merchandising solution they are currently using so that they can shuffle between multiple applications based on their privileges and avoid having to open a new tab and enter a new URL to launch an application. Users can instead click on the solution from a list, which will launch that application in a new tab or window based on the browser settings.



If a user has access to multiple applications (based on their defined role) you can configure their list to show all available solutions in the Application Navigator page. Otherwise only the current solution will be displayed. Clicking on the Application Navigator option in the Settings > User Interface menu will open the Application Navigator screen in the Oracle Retail Application Administrator Console (ORAAC).



Add an Application

The Add action is enabled at all times and allows an administrator to add a new URL.

1. From the Actions menu, select Add. A new, empty entry is added to the table.
2. Enter a name, the application URL, and the role to which the URL applies. The remaining columns are populated automatically. URLs for the Merchandising solutions, or other solutions used by your user community can be included here.
3. Click Save to save your changes.

Users impacted by the new URL link you've added may need to log out and back in, in order to see the changes.

Modify an Application

While all the columns on a row can be modified, only the Role and URL columns of a System record can be modified by the administrators. After making updates, click **Save** to save your changes.

Duplicate an Application

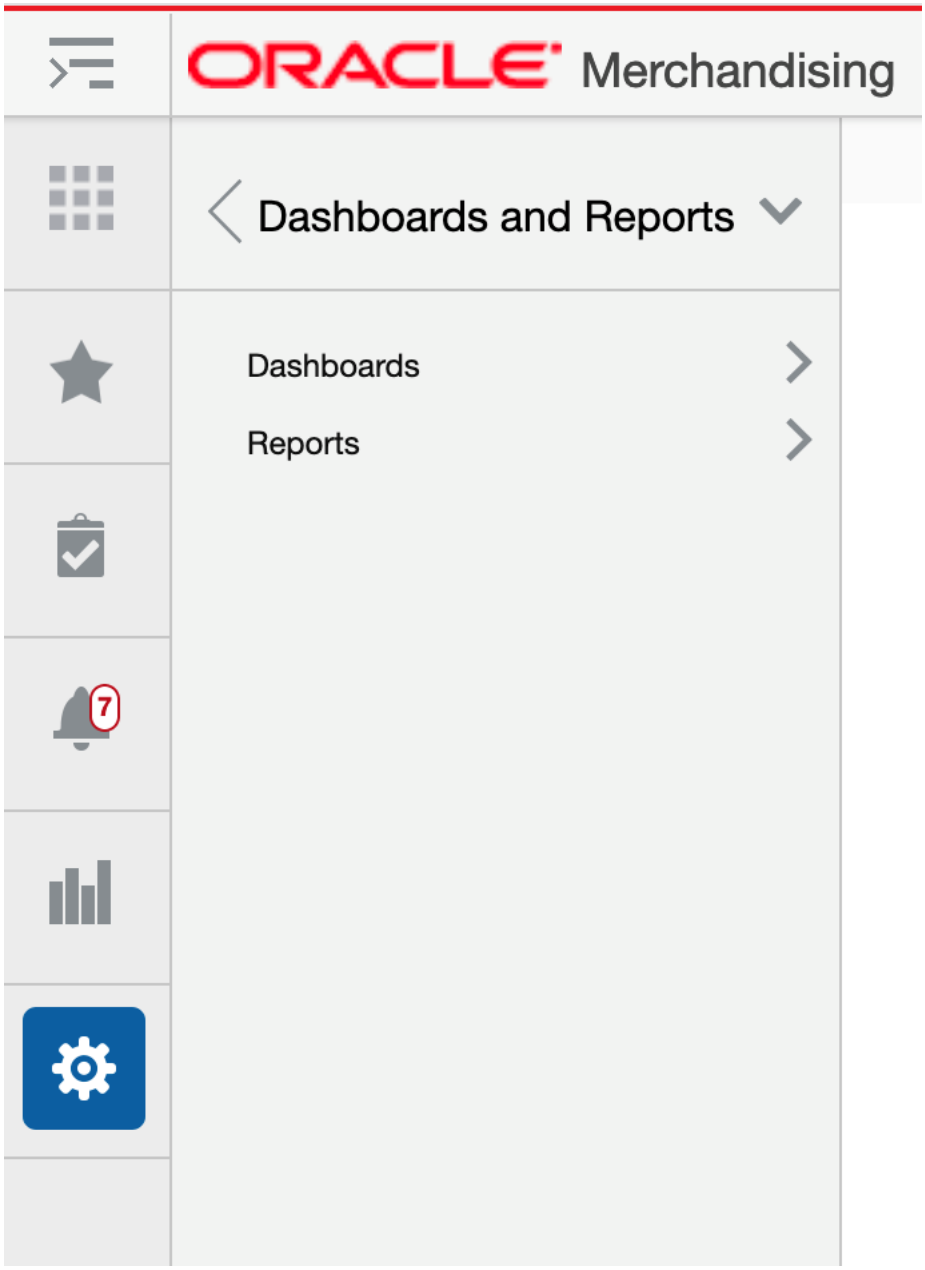
The Duplicate action adds a copy of each selected row below its originating row. The object name or unique identifier of the duplicate row is "Copy of <Object Name>" and appears in edit mode to prevent accidentally creating duplicate labels. This function may be helpful if you want to add the same link for multiple roles. After making updates, click Save to save your changes.

Delete an Application

The Delete action is enabled when an entry is selected. When the user selects an application navigator entry and clicks **Delete**, the user is prompted with a warning message. Click **Yes** and the selected entry is removed. After making updates, click **Save** to save your changes.

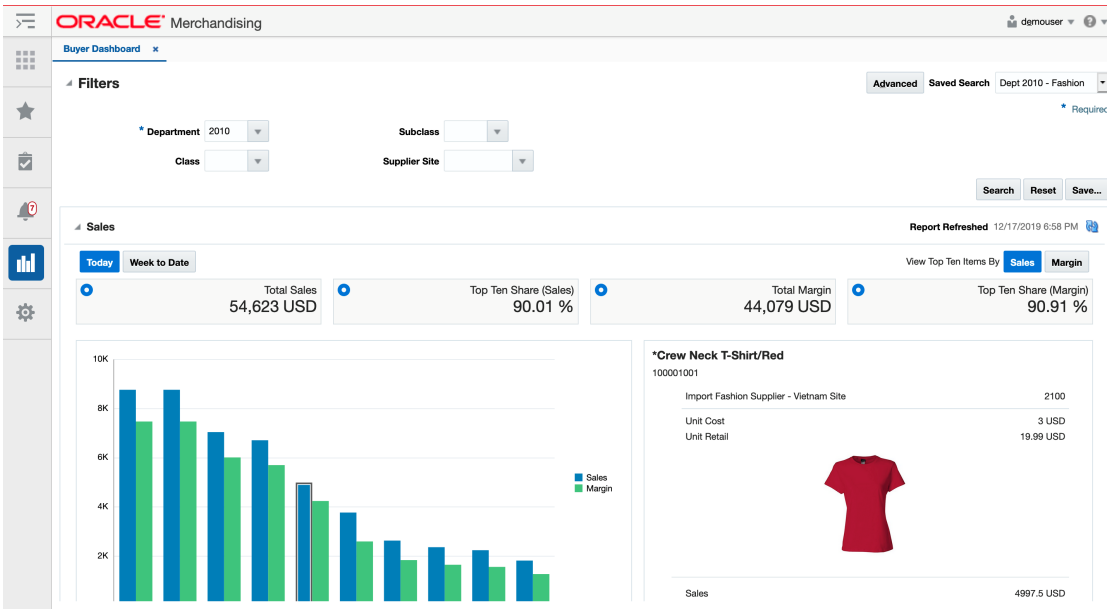
Dashboards and Reports

The Dashboard and Reports menu under Settings provides options to customize the reports displayed in Dashboards and the contextual pane in the Merchandising solutions. This can be used to add your own reports in the dashboard or in the contextual pane. Or to re-order or remove base reports from a particular dashboard or screen, or even to move base reports to different dashboards or contextual panes.

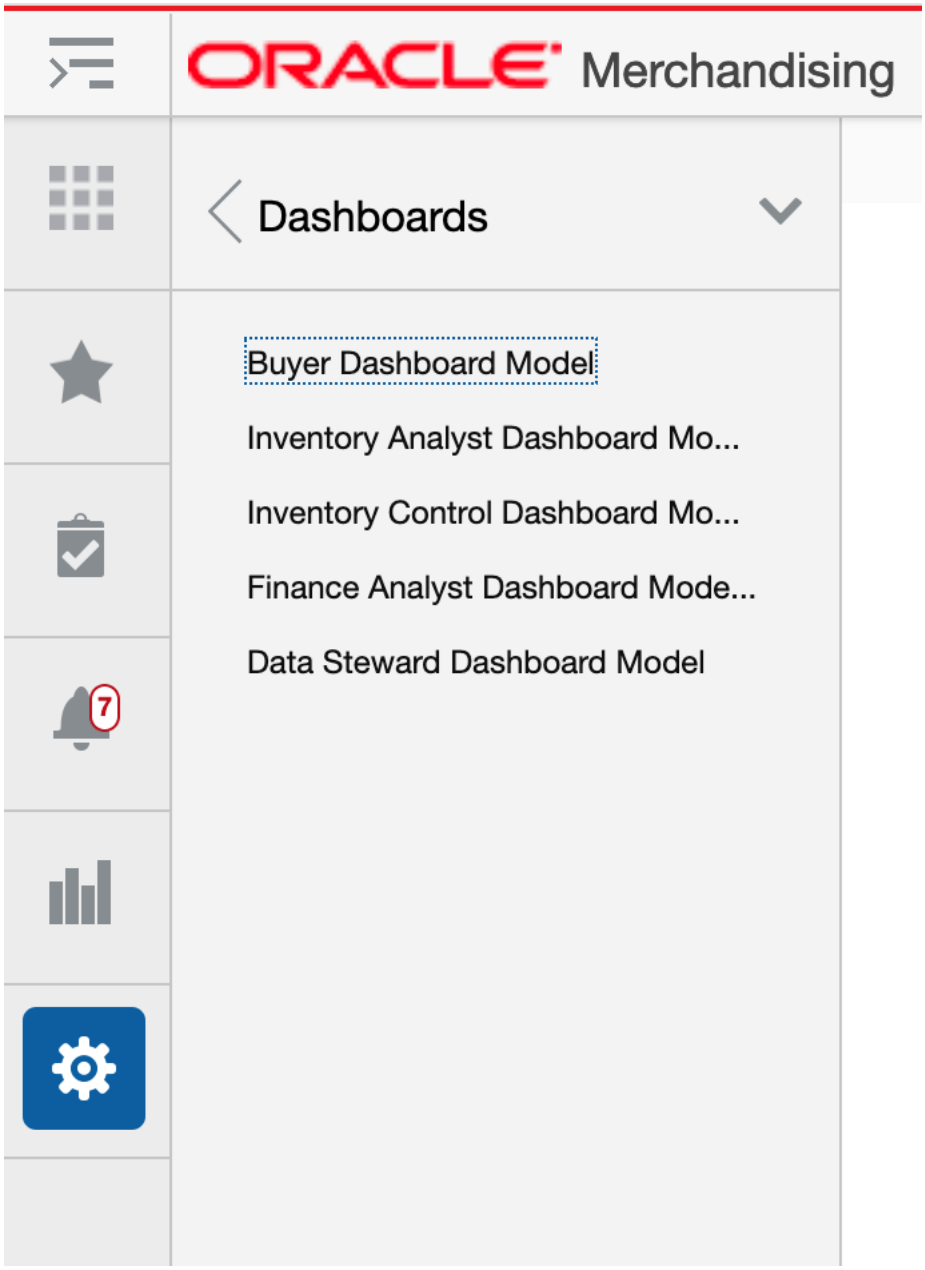


Dashboards

Dashboards are used by Merchandising solutions to surface exceptions and key metrics to users. Each dashboard is targeted for specific user roles, like the Buyer dashboard shown below. Most dashboards have two main sections - the filters and the reports.



The base solutions come with pre-defined reports, which can be used. But, you can also add your own reports and re-order or remove ones that don't apply to your business. The filters cannot be modified. Adding or modifying the reports for a dashboard is done through the Settings > Dashboards and Reports > Dashboards link.

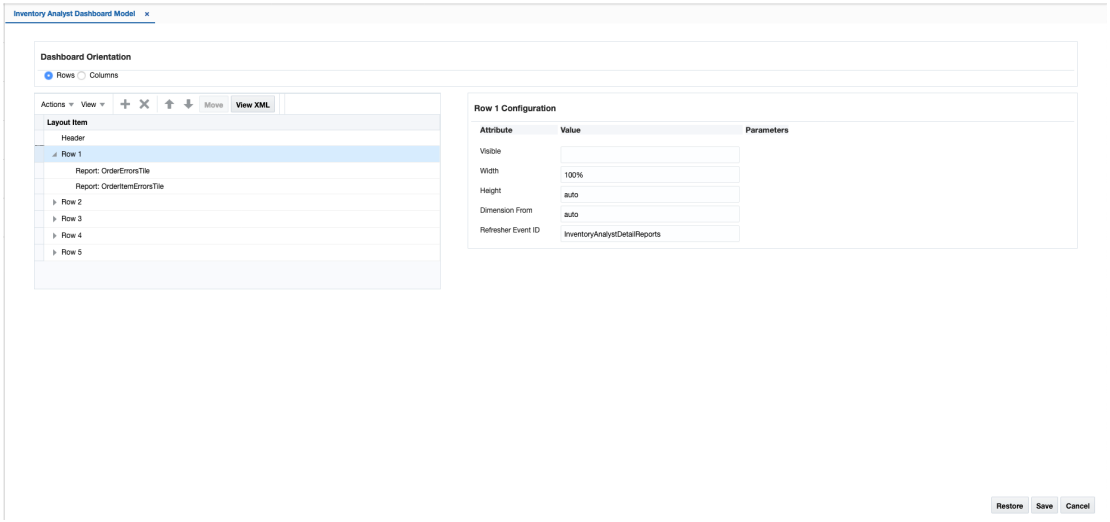


Clicking on the Dashboards option will show you a list of the available dashboards in the Merchandising solution you are logged into. To modify a dashboard, click the appropriate link. This will open the Dashboard Model page for the selected dashboard, as shown below.

In this page, you can add new reports to the dashboard, modify the appearance of existing reports, reorder the reports in the dashboard, or remove the reports from display.

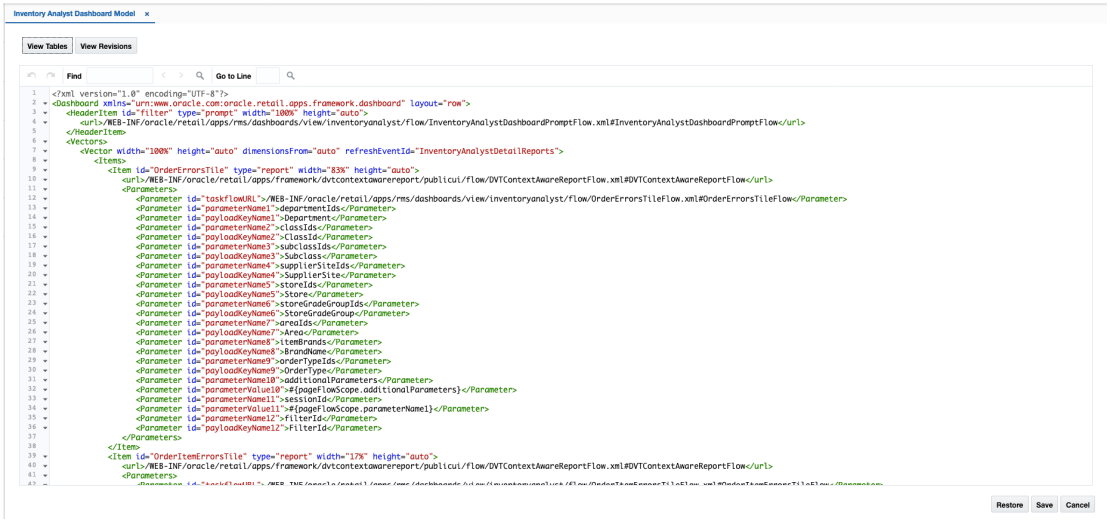
When you click **Save**, your changes will not be immediately reflected in the dashboard if it is open. To see the changes reflected, close the dashboard and reopen it. The **Cancel** button closes the tab without saving the changes. The **Restore** button replaces the customized dashboard with the base product configuration.

Figure 6-10 Table View



You can also click on the **View XML** button to view the XML version of the dashboard in an XML editor. The XML view contains a **View Tables** button which takes the user back to the tables view. The XML view also has a **View Revisions** button that allows you to view prior revisions of the dashboard. This should be used to re-apply any customizations you make after a patch is applied, as customizations are not retained during patching.

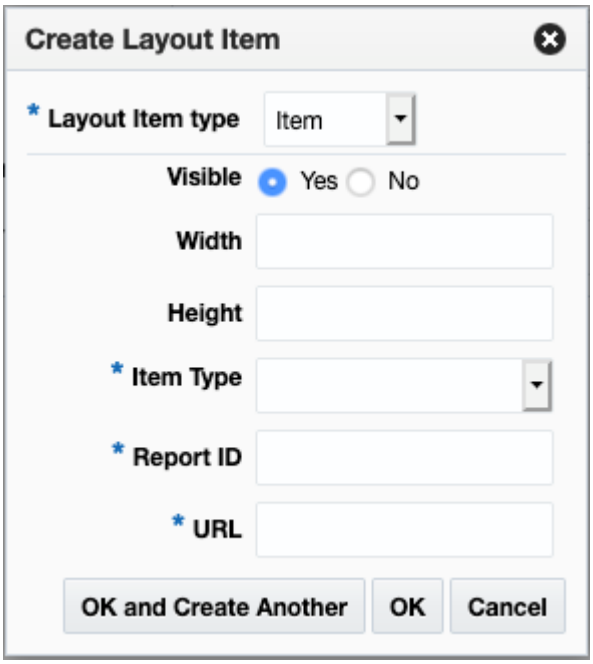
Figure 6-11 XML View



Add a Report

If you have created a custom report that you want displayed in a base dashboard, then in the Settings Menu, click on the Dashboards and Reports folder and then the Dashboard folder;

then select the dashboard you wish to edit. Click the create iconic button ( ) in the Layout Item table toolbar, or select Create from the Actions menu. This will display a popup similar to the below:

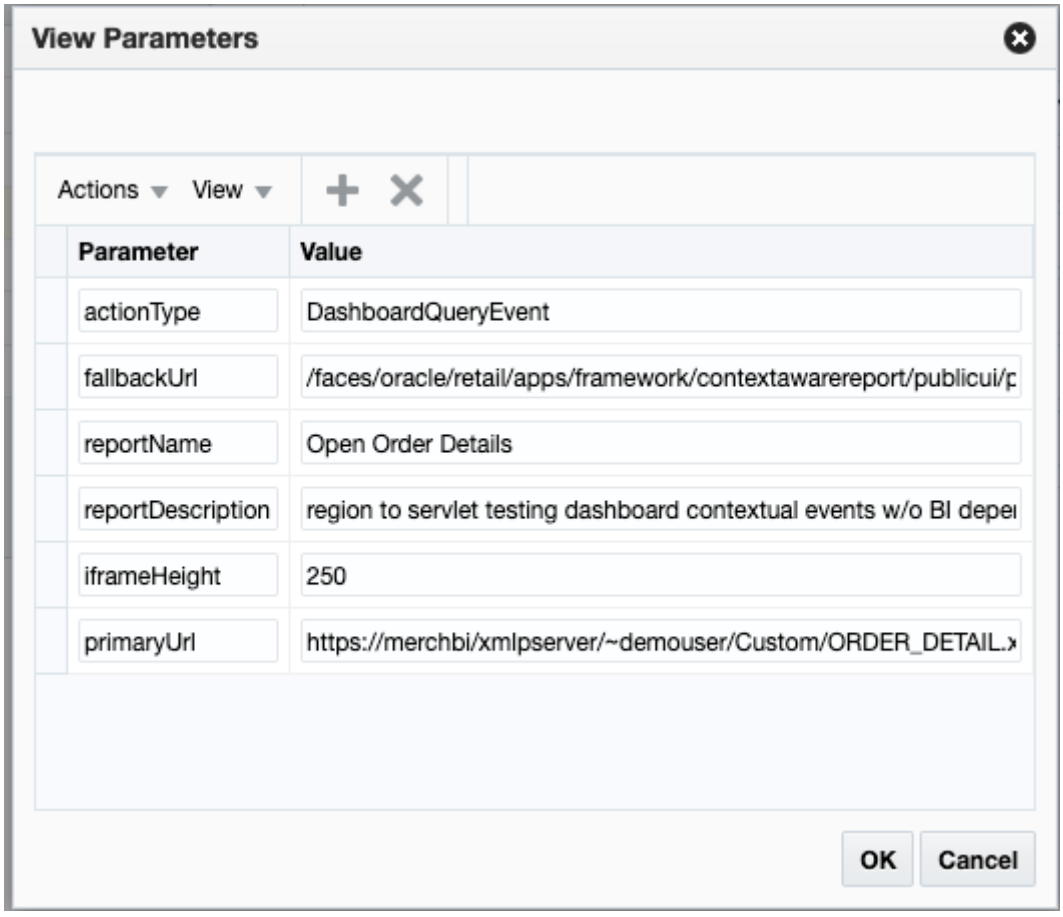


For the new report item, enter all the required fields in the popup as follows:

Attribute	Description
Layout Item Type	For custom reports, the only valid value is item.
Visible	Indicate whether or not you want your report to be visible in the dashboard. Valid values are Yes (true) and No (false). The default when adding a new report will be Yes. It can also be an Expression Language (EL) expression that evaluates to true or false, such as if you want to use the application security settings to determine the visibility of your report. For example, if you want your link only visible to users with the Maintain Items privilege, then you can use the ADF `securityContext` API `isUserInRole` method and set this to `#{securityContext.userInRole['MAINTAIN_ITEMS_PRIV']}`.
Width	Indicates the percentage of the overall width of the dashboard you want your report to be displayed in the dashboard. Usually you will want this to be 100%.
Height	Indicates how tall your report should be in the dashboard in pixels. You can also specify auto if you want the overall size of your report to determine how it is displayed. However, if you have a larger report, this may not be ideal.
Item Type	For custom reports, the only valid value is report.
Report ID	Unique identifier for your custom report. When adding your custom report, make sure that it does not duplicate any of the base IDs.

Attribute	Description
URL	In order for your report to be refreshed using the dashboard parameters, you will want to use the following for the URL in the popup. `/WEB-INF/oracle/retail/apps/framework/contextawarereport/publicui/flow/ViewContextAwareReportFlow.xml#ViewContextAwareReportFlow` The actual report will be defined as an attribute parameter (see table below).

Then click OK. You should now see your report listed in the Layout Item table. For your custom report, you will also need to configure some additional attributes and parameters. This is done by clicking the View link next to the URL link in the configuration panel, which results in the View Parameters popup being displayed. Initially this will be blank for a newly added custom report.



Click the **Create** iconic button or select **Create** from the Actions menu to add parameters. Below are the recommended minimum parameters that you add for your report:

Attribute	Description
actionType	This should be set to DashboardQueryEvent.
fallbackUrl	Set this to the same value as you used for URL above.
primaryUrl	The full URL for your report. If it is a BI publisher report, your URL might look like this: `https://<hostname>/<tenantname>/xmlpserver/~demouser/Custom/ORDER_DETAIL.xdo?_xmode=4&_xf=analyze&DeptNo=<Department>` Note that the report URL also includes references to the dashboard filters, in this case department. For a full list of the available parameters for each dashboard, see "Dashboard Parameters" in the appendix.
reportDescription	This should be a description of the report to be used by a screen reader. Required to ensure your report appears in the dashboard.

Click **OK** to save your changes in the View Parameters popup. Then, click **Save** in the dashboard model page to save your dashboard settings.

To test the configuration, open the dashboard where you added your report to validate that it is displayed as expected.

Modify a Report

If you want to modify a custom report you added previously, you can also do that in the dashboard model page (Settings > Dashboards and Reports > Dashboards) for the applicable dashboard. Also, there are some changes you can make to base reports in this view, with limitations.

Rearrange Reports

If you want to rearrange the order of the reports in a dashboard (base or custom), highlight the report to be moved in the Layout Item table of the appropriate dashboard model page. Then, click on the up or down arrows ( ) in the Layout Item table toolbar to move the report up or down. If you want to move the report to a different column or row, then highlight the report to be moved in the Layout Item table of the dashboard model page. Then, click the **Move** button in the Layout Item table toolbar. This will open a popup where you can select the new column or row for your folder or link.

Add a Base Report to Another Dashboard

If you want to add one of the base reports to a different base dashboard, you can do this, provided the parameters required by the report are available in the dashboard filter where you want to add it. The easiest way to do this is to copy the XML for the base report and paste it into the new dashboard's configuration and then update naming or remove any non-required parameters from the configuration that aren't supported in the new dashboard. For example, if you wanted to also display the Incomplete Items report (on the Data Steward dashboard in the base configuration) in the Buyer Dashboard, then you'd do the following:

1. Click on Settings > Dashboards and Reports > Dashboards and open the configuration for the Data Steward dashboard.

2. Click on the View XML button to switch to the XML view.
3. Highlight the full configuration for the report with the ID IncompleteItems, including all the parameters and copy the text.
4. Click on Settings > Dashboards and Reports > Dashboards and open the configuration for the Buyer dashboard.
5. Click on the View XML button to switch to the XML view.
6. Paste what you copied from the Data Steward model in this view. Where you copy it will determine where it will be displayed in the dashboard - for example, if you want it displayed first, paste it above the configuration for DailySales. This can also be changed later following the instructions above in the Rearrange Reports section.
7. Remove any parameters that are not available in the new dashboard. For this report, that includes parameters 9-16 related to UDA values, location, create dates, item type, item level, transaction level, UDA, and season.
8. Click **Save** to save your changes.

Open the Buyer dashboard to validate that the Incomplete Items report is displayed as expected.

Modify Report Attributes

For custom icons, you can update any of the attributes that are described above under Add a Report. For base reports, it is recommended that you only modify the Visible property to hide a report if you do not want it displayed or only want it displayed for users with certain privileges.

Remove a Custom Report

If you want to remove a custom report that you previously added, then, in the appropriate dashboard model page, highlight the report in the Layout Item table and click on the delete iconic button ( ) or select **Delete** from the Actions menu.

> **Note:**
>
> It is highly recommended that you don't delete any of the base reports.

Re-apply Dashboard Customizations After Patching

If you have made any customizations to a dashboard, then after a patch update, the changes will be lost. To re-apply your changes after patch updates, follow these steps:

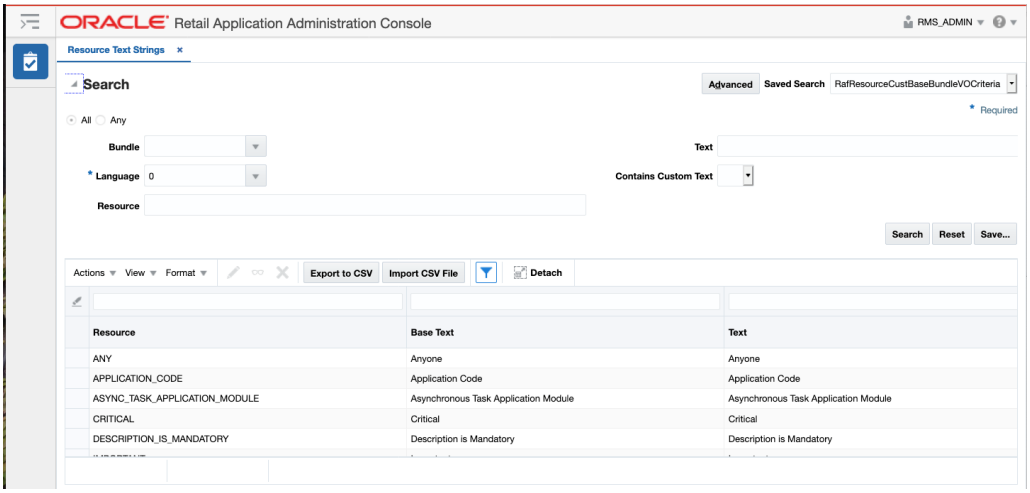
1. From the Settings menu, select Dashboards and Reports and then select the dashboard menu model you wish to update.
2. In the dashboard model page, click the **View XML** button, and then from the XML view, select **View Revisions**.
3. This will open the Dashboard Model Versions page.
4. From here, similar to the Tasks menu, you can view the base version, your customized version, or a comparison of the two. The comparison view highlights your additions and subtractions from the base model.

5. Note the customizations made - you may want to copy to a text editor, highlighting the changes as appropriate - and then click **Back** to return to the Dashboard Model Versions page.
6. Click **Cancel** to return to the Dashboard Model XML View page. Using the highlighted differences from the revision page, reapply your customizations. Then, click **Save**.
7. Open the dashboard that you just updated to validate that your changes have been re-applied.

Label Customization

Resource Bundles

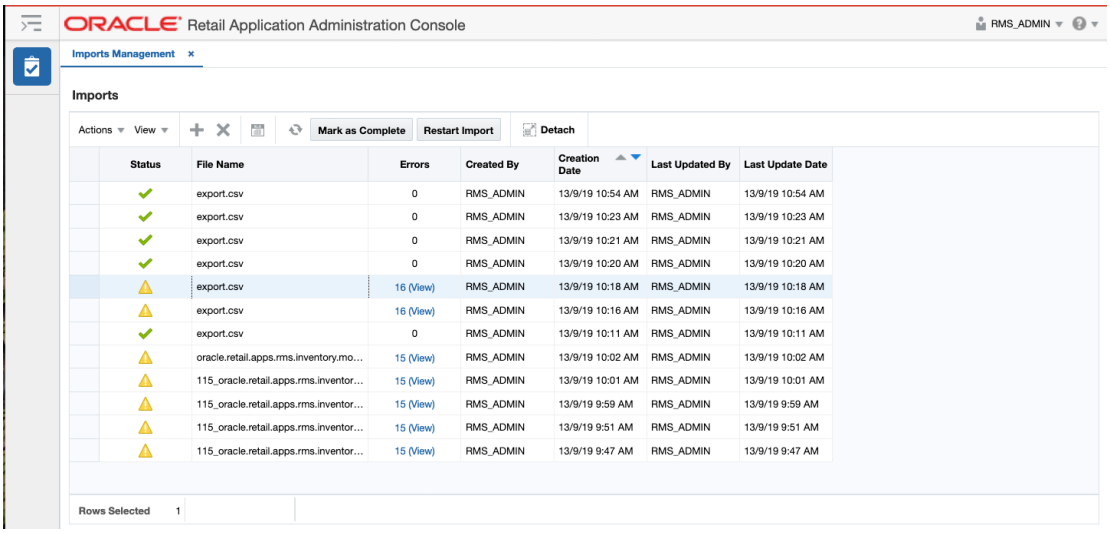
The Resource Bundles option in the customization menu has screens that allow you to customize certain labels, error messages, and list of values used by Merchandising solutions. The Resource Text Strings option provides a screen to do this customization for your primary language or other supported languages. It can also be used for adding translations for languages that are not supported in the Merchandising solutions.



To update the description, select the language in which you want to make your updates and optionally a partial text string to search for the instances you want to update. Then, click the Edit option in the Actions menu or the iconic button ( ).

This will open a popup where you can enter your custom text. If there are a lot of strings that require updates, you can also select to export the data to a CSV and then re-import once your changes have been applied.

The other option under Resource Bundles, entitled Imports Management, allows you to view the status of the imported files and any errors that occurred during the re-import process. This screen also allows you to import files and re-process that previously encountered errors, if you believe the issue has been corrected.



See also the "UI Platform Services" section for using ReST services for integrating label updates. If you make any changes to labels either using the screens shown here or using the service, you will need to log an SR to get support in activating the changes in your environment as it requires a server restart.

> **Note:**
>
> Merchandising also holds a number of labels and error messages in database tables. For information on updating these, see the Codes and Descriptions and Error Messages sections of the *Oracle Retail Merchandising Implementation Guide*. Updates for these two components do not require a server restart.

Dynamic Hierarchy

The Dynamic Hierarchy in Merchandising allows you to change the names of the merchandise and organizational hierarchy levels, as well as the terms used for manufacturers, distributors, wholesalers, franchisees, and countries of manufacture. This includes singular and plural values in both the default English version of the terms, as well as translated terms for all supported languages.

For example, if you want to call the fourth level of the merchandise hierarchy ‘Category’ instead of ‘Department’, you can change the corresponding tokens from ‘Department’/’Departments’ to ‘Category’ and the plural ‘Categories’. These values will be used to replace all instances of ‘Department’ and ‘Departments’ throughout Merchandising.

To change any of the provided token values, you will need to upload a `.csv` file containing the following fields from the Dynamic Hierarchy Token Mapping table (`DYNAMIC_HIER_TOKEN_MAP_TL`):

- LANGUAGE
- TOKEN
- RMS_NAME

- CLIENT_NAME

For example:

	A	B	C	D	E	F	G
1	LANGUAGE	TOKEN	RMS_NAME	CLIENT_NAME			
2	en	@OH1@	Company				
3	en	@OHP1@	Companies				
4	en	@OH2@	Chain				
5	en	@OHP2@	Chains				
6	en	@OH3@	Area				
7	en	@OHP3@	Areas				
8	en	@OH4@	Region				
9	en	@OHP4@	Regions				
10	en	@OH5@	District				
11	en	@OHP5@	Districts				
12	en	@MH2@	Division				
13	en	@MHP2@	Divisions				
14	en	@MH3@	Group				
15	en	@MHP3@	Groups				
16	en	@MH4@	Department				
17	en	@MHP4@	Departments				
18	en	@MH5@	Class				
19	en	@MHP5@	Classes				
20	en	@MH6@	Subclass				
21	en	@MHP6@	Subclasses				

The file should be defined as follows:

1. The file should be named `dynamic_hierarchy_mapping_tl.csv`
2. In the `.csv` file, you only need to provide records for the tokens that need to be updated. Other token values will not be touched and should not be present in the `.csv` file.
3. The `client_name` field should hold the desired name to which you would like to change the label.
4. Token changes for different languages can be included in this same file.
5. Do not use quotes surrounding the language, token, or name values. For example:

   “en”," @OH2@",”Chain”,”Geo-Region” *incorrect*

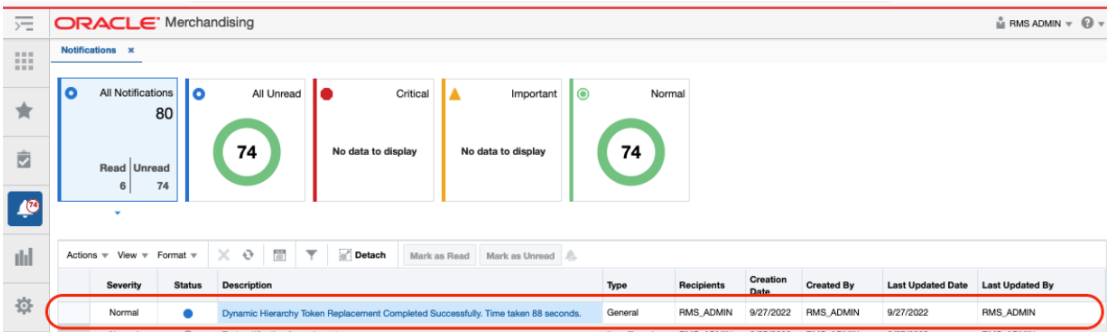
   en,@OH2@,Chain,Geo-Region *correct*

6. Include a newline character in the last line. This can be verified by opening the `.csv` file in a text editor such as Notepad++ rather than opening in Microsoft Excel or Open Office. The below screenshot depicts an example of how the `.csv` should be defined:

```
LANGUAGE,TOKEN,RMS_NAME,CLIENT_NAME
en,@OH2@,Chain,Geo-Region
en,@OHP2@,Chains,Geo-Regions
en,@MH2@,Division,Brand
en,@MHP2@,Divisions,Brands
en,@MH3@,Group,Gender
en,@MHP3@,Groups,Genders
```

Once the file is ready, it should be uploaded through File Transfer Services using the `AdminProcess` storage prefix. For more details, refer to the “File Transfer Services (FTS)” section of the “ReSTful Web Services” chapter in the *Merchandising Inbound and Outbound Integration Guide* found in the Help Center on the Merchandising Foundation Cloud Service **Operate & Integrate** page.

The background job that executes these changes will run once every 30 minutes. Once the job has completed, the number on the notification icon in the task bar will increase and a notification will be presented in the notifications pane. You can view details of the notification in the Notifications screen as shown below:



7
UI Platform Services

The user interface for the Merchandising solutions has some common components that you may want to use in building custom workflows related to managing user notifications.

These ReST services are packaged as part of the Merchandising solution's Enterprise Archive (EAR) file. Installation of the ReST web services is therefore done by default.

Security

Services are secured using the J2EE-based security model.

- Realm-based User Authentication: This verifies users through an underlying Realm. The username and password are passed using HTTP basic authentication.
- Role-based Authorization: This assigns users to roles; authenticated users can access the services within the Merchandising suite.
- The communication between the server and client is encrypted using one-way SSL. In non-SSL environments the encoding defaults to BASE-64 so it is highly recommended that these ReST services are configured to be used in production environments secured with SSL connections.

Standard Request and Response Headers

The UI platform ReSTful web services have the following standard HTTP headers:

Name	Value	Required	Description
Accept	application/json OR application/xml	Optional. If a response payload is expected instead of just an appropriate HTTP status code	Tells the server the MIME-type of the resource.
Accept-Version	1.8.3	Yes	Depicts which version of the Platform Services is expected.
Accept-Versioning	false	No	Specified in the service request to bypass version validation
Accept-Language	en-US	No	Defaulted by most clients to the destination locale
Content-Type	application/json OR application/xml	Optional. If a request payload is expected. Helps the server determine how to parse the request.	Informs the server during PUT or POST requests, of the format of the payload being sent.
Authorization	Base64 encoded credentials string	Yes	Authenticates a user agent with the server

Depending on the type of the operation or HTTP method, the corresponding response header is updated in the HTTP response with the following codes:

- GET/READ : 200
- PUT/CREATE : 201 created
- POST/UPDATE : 204
- DELETE : 204

Standard Error Response

Example response payload in case of service error is depicted below:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<messagesRDOes>
  <messagesRDO>
     <message>REST Service Version Mismatch</message>
     <messageType>ERROR</messageType>
     <status>BAD_REQUEST</status>
 </messagesRDO>
</messagesRDOes>
```

- **Message:** The error message - translated.
- **MessageType:** Value of 'ERROR' is returned.
- **Status:** For a bad request or error, the status is BAD_REQUEST.
- The http error code for an error response is 400

List of ReST Services

The ReST services exposed by the UI platform are accessible from a URL that is different for each of the Merchandising cloud services. The URLs to use for each solution are:

Merchandising: https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/RmsPlatformServices/services/private/*

Sales Audit: https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/ResaPlatformServices/services/private/*

Pricing: https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/ PricingPlatformServices/services/private/*

Allocation: https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/AllocPlatformServices/services/private/*

Invoice Matching: https://rex.retail.<Region Name>.ocs.oraclecloud.com/<Customer Subnamespace>/ReimPlatformServices/services/private/*

Notifications

Description	URL	HTTP Method
Creating Notifications	`/Notifications/create`	POST
Updating Notifications	`/Notifications/update`	PUT
Deleting Notifications	`/Notifications/delete/{id}`	DELETE
Fetch Notifications	`/Notifications/fetch?appCode={appCode}`	GET
Get number of unread Notifications	`/Notifications/fetch/unreadCount?appCode={appCode}`	GET
Search Notifications	`/Notifications/search?appCode={appCode}`	GET
Filter Notifications - Return list of Notifications	`/Notifications/filter/list`	POST
Filter Notifications - Return grouped list of Notifications	`/Notifications/filter/group`	POST
Filter Notifications - Return a summarized list of Notifications	`/Notifications/filter/summarize`	POST
Count Notifications matching the filter	`/Notifications/filter/count`	POST
Persist the Criteria	`/Notifications/criteria`	POST
Fetch the Criteria	`/Notifications/fetch/criteria?appCode={appCode}`	GET
Fetch Recipients	`/Notifications/fetch/recipients/{id}`	GET
Fetch Notification Context	`/Notifications/fetch/context/{id}`	GET
Fetch Notification Time Periods	`/Notifications/fetch/timeperiods?appCode={appCode}`	GET
Fetch Notification Hierarchy Levels	`/Notifications/fetch/hierarchylevels?appCode={appCode}`	GET
Fetch Notification Types	`/Notifications/fetch/notificationtypes?appCode={appCode}`	GET
Status update for multiple Notifications	`/Notifications/update/multiple/status`	PUT

Description	URL	HTTP Method
Delete multiple Notifications	`/Notifications/delete/multiple`	POST

8

Using BI Publisher for Custom Reports

The ability to utilize Oracle Business Intelligence Publisher (BI Publisher) for custom reports is available as part of your Merchandising suite service subscription and is the only option available for creating custom reports against the live production database. Other reporting tools can be used, but must be based on other data sources, such as the replicated data in the Retail Data Store (RDS) or the Data Access Schema (DAS).

Accessing BI Publisher

In a SaaS implementation, you will access BI Publisher using a URL like this, where the hostname is replaced with that which is relevant for your implementation:

```
https://<hostname>/<tenantname>/xmlpserver
```

In order to create reports, you will need to ensure you have the below privileges assigned to your user ID through IDCS:

- <tenantId>-BIConsumer
- <tenantId>-BIContentAuthor
- <tenantId>-DVConsumer
- <tenantId>-DVContentAuthor

Creating a BI Publisher Report

BI Publisher supports creating a number of different types of reports, including reports with charts, table-based report, and so on. For details on how to create reports in BI Publisher, see the *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*, especially Chapter 2 on creating and editing reports.

> **Note:**
>
> Custom reports in a user's My Folder will not be backed up by Oracle but could be manually backed up by the user. Otherwise, all custom reports should be saved in the `Shared Folders/Custom` folder to ensure that they are included in the backup/ restoration processes.

Displaying a BI Publisher Report

Once you have created your report you'll need to identify the URL for the report. The basic URL structure will be:

```
http://<hostname>/<tenantname>/xmlpserver/<ReportDirectory>/<ReportName>.xdo
```

- `hostname` and `tenantname` - will be the hostname and tenant ID for your Merchandising BI Publisher implementation
- `xmlpserver` - this is a static string
- `ReportDirectory` - folder path to the report
- `ReportName.xdo` - the filename you gave the report; if the name has spaces, then use a + between words

You may also specify some BI Publisher formatting parameters for your report. The full list can be found in chapter 2 (Creating and Editing Reports) of the *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher* in the section titled Specifying Parameters in the URL. But, some key ones you may consider to give your reports a similar look and feel to the Merchandising reports are:

- `_xmode` - it's recommended that you set this to 4, which hides the BI Publisher specific banners and parameters
- `_xpt` - this should be set to 1 so that the report doesn't launch a new window

Here's an example of the basic URL with some parameters specified, including the order number parameter, which is an input for this report:

```
https://<hostname>/<tenantname>/xmlpserver/~demouser/Custom/ORDER_CFAS.xdo?
_xmode=4&_xf=html&_xpt=1&OrderNo=<Order>
```

Configuration in Merchandising

Use this URL to configure the report into an existing dashboard or contextual pane as described in the "Dashboards and Reports" section.

BI Publisher Reports Delivery Through Object Storage

In the next generation Merchandising Suite of solutions, object storage replaces the SFTP delivery channel.

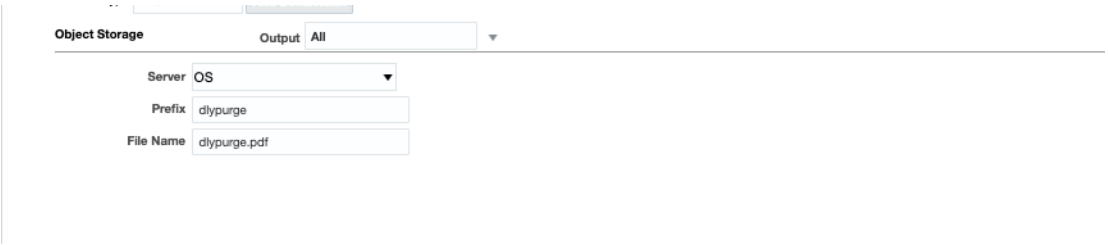
Delivering scheduled reports through Object Storage

For details on how to set up reports delivery through object storage, refer to Set Output Options in *Oracle Cloud Visualizing Data and Building Reports in Oracle Analytics Cloud*.

While adding the destination for the reports delivery as Object Storage, you will need the following set of inputs that are required to push the file to object storage.

1. **Server** – The server is preconfigured as `OS` for any tenant. `OS` must always be selected.
2. **Prefix** – The prefix under the object storage bucket where the file will be uploaded
3. **File Name** – The file name with which the scheduled report output will be delivered to the object storage.

For example:



Delivering Burst Reports through Object Storage

For details on how to create a burst query refer to Add Bursting Definitions in the *Oracle Cloud Modeling Enterprise Data in Oracle Analytics Cloud*.

After configuring the data model as you build your burst query by navigating to the bursting section you need to be aware of some of the key parameters to be supplied to the burst query

Sample Bursting Query for object storage as the delivery channel:

```
select i.DEPT KEY,
'<template_name>' TEMPLATE,
'RTF' TEMPLATE_FORMAT,
'en-US' LOCALE,
'PDF' OUTPUT_FORMAT,
'OBJECTSTORAGE' DEL_CHANNEL,
'<output_name>' OUTPUT_NAME,
'OS' PARAMETER1,
'<prefix>'PARAMETER2,
'<file_name>' PARAMETER3
FROM
ITEM_MASTER I
```

Key parameters to be noted here for object storage mechanism are:

1. `DEL_CHANNEL` — This needs to be keyed in as `OBJECTSTORAGE`.
2. `PARAMETER1` — Use `OS` as the parameter value for this, because this is the preconfigured server name. The value for this should be kept as `OS` and should not be changed.
3. `PARAMETER2` — Prefix under object storage bucket where the file will be uploaded.
4. `PARAMETER3` — File name.

Downloading the BI Publisher reports from Object Storage

Once the reports are sent to object storage, use the `createPar` service to download the files. This service is available in Retail Home; it generates a PAR (Pre-authenticated Request) to download the file.

For more details on this, refer to the Retail Home documentation.

A

Appendix A: Dashboard and Contextual Parameters

Dashboard Parameters

In order to embed custom reports in base dashboards and have those reports leverage the data filters, you will want to use them as input parameters in your reports. For any parameters that support multiple values through use of the advanced search option, the parameters will contain all values added in the search separated by commas. For example, in the Buyer dashboard if more than one department is put in the filter, then both of those would be passed in the parameter departmentIds. The tables below outline the parameters used for each of the dashboards in the Merchandising solutions for that purpose.

Merchandising

Dashboard	Parameter Displayed Name	Parameter
Buyer	Department	departmentIds
	Class	classIds
	Subclass	subclassIds
	Supplier Site	supplierSiteIds
	Store	storeIds
	Brand	brands
	Country of Sourcing	originCountries
	Order Context	orderContextIds
Data Steward	Department	departmentIds
	Class	classIds
	Subclass	subclassIds
	Supplier Site	supplierSiteIds
	Country of Sourcing	originCountries
	Created Date	createDates
	Location	locationIds
	Brand	brands
	Item Type	itemTypeId
	Item Level	itemLevelId
	Transaction Level	tranLevelId
	UDA	udaId
	UDA Value	udaValues
	Season	seasonId

Dashboard	Parameter Displayed Name	Parameter
Finance Analyst	Set of Books	setOfBooksIds
	Org Unit	orgUnitIds
	Location	locationIds
	Department	departmentIds
	Class	classIds
	Subclass	subClassIds
Inventory Analyst	Department	departmentIds
	Class	classIds
	Subclass	subclassIds
	Supplier Site	supplierSiteIds
	Area[1]	areaIds
	Store Grade	storeGradeGroupIds
	Store	storeIds
	Brand	itemBrands
	Order Context	orderTypeIds
Inventory Control Analyst	Chain	chainIds
	Area	areaIds
	Location	locationIds
	Supplier Site	supplierSiteIds
	Department	departmentIds
	Class	classIds
	Subclass	subClassIds

1 Either Area or Store Grade are displayed in the filter, depending on the system option setting.

Sales Audit

There are no filters on the Sales Audit dashboard.

Pricing

Dashboard	Parameter Displayed Name	Parameter
Pricing Analyst	Department	Department
	Class	ClassId
	Subclass	Subclass
	Zone	Zone
	Channel	Channel
	Store	Location
	Supplier Site	SupplierSite
Promotion Planner	Department	Department

Dashboard	Parameter Displayed Name	Parameter
	Class	ClassId
	Subclass	Subclass
	Zone	Zone
	Channel	Channel
	Store	Location
	Supplier Site	SupplierSite

Invoice Matching

Dashboard	Parameter Displayed Name	Parameter
Accounts Payable Reviewer	AP Reviewer	ApReviewer
	Set of Books	SetOfBooks
	Location	Location
	Supplier	Supplier
	Supplier Site	SupplierSite
	Department	Dept
	Class	Class1
	Subclass	Subclass
	Org Unit	OrgUnit
	Document Date	DocDate
	Item	Item

Allocation

Dashboard	Parameter Displayed Name	Parameter
Allocator	Department	DepartmentId
	Class	ClassId
	Subclass	SubclassId

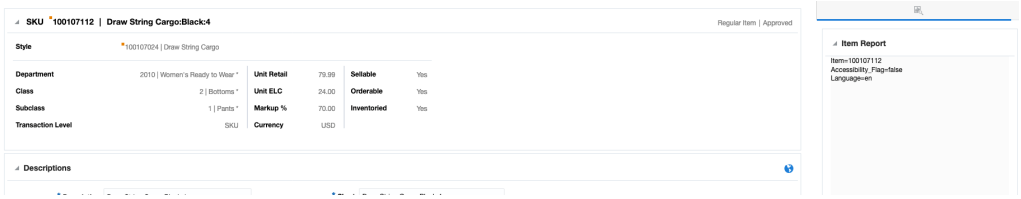
Contextual Parameters

In order to create reports that are contextual to the page in which they are displayed, you will need to use the available parameters for that page and also know which events trigger an update to the parameters. This section outlines what is supported for each of the Merchandising solutions.

Merchandising

For all of the Merchandising contextual panes, there is a report that can be used to help with visibility to the parameters available. This helper report can be configured on during development phases of your program and then configured off in production. It is controlled by

the report system option RMS_OI_SYSTEM_OPTIONS.DISPLAY_CONTEXTUAL_PAYLOAD.Here is an example of what the report looks like in the Item workflow:



Additionally, all the Merchandising contextual models support the following two parameters:

- Accessibility flag (accessibilityEnabled) - indicates whether or not the user has turned on Screen Reader mode
- Preferred Language (preferredLanguage) - indicates what is the language that the user selected in User Preferences

Other parameters are dependent on the associated workflow and are described below.

Contract Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Contract	Contract Item Contextual Model	ContractItemEvent	Contract page is loaded	ContractNum Supplier StartDate EndDate Status ContractCurrency DisplayCurrency
			Items table row is selected	ContractNum Item ItemParent Diff1 Diff2 Diff3 Diff4
			Items Details table row is selected	ContractNum Item Location ReadyDate

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Orders for Contracted Items	Contract Item Order Item Contextual Model	ContractedOrderItemEvent	Orders table row is selected	ContractNum Item Location Supplier OrderType
			Items table row is selected	ContractNumItem
			Locations table row is selected	ContractNum Item Location

Cost Change Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Cost Change By Item	Cost Change By Item Contextual Model	CostChangeItemSelectedEvent	Item table row is selected	CostChangeId Item Supplier OriginCountry EffectiveDate DisplayCurrency RandomNo
Cost Change By Item Location	Cost Change By Item Location Contextual Model	CostChangeItemLocSelectedEvent	Item Location table row is selected	CostChangeId Item Location Supplier OriginCountry EffectiveDate DisplayCurrency RandomNo

Deals Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Deal	Deal Head Contextual Model	DealHeadEvent	Components table row is selected	DealId Supplier/Partner DealCompId DealCurrency DisplayCurrency

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
			Deal page is loaded	DealId Supplier/Partner DealCurrency DisplayCurrency
Fixed Deal	Fixed Deal Head Contextual Model	FixedDealHeadEvent	Fixed Deal page is loaded	DealId Supplier/Partner DisplayCurrency
			Fixed Deal page is loaded	Supplier/ PartnerDisplayCurrency

Franchise Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Franchise Order	Franchise Order Head Contextual Model	FranchiseOrderEvent	Franchise Order page is loaded	WfOrderNoCustomer
			Items table row is selected	WfOrderNo Item SourceLocation CustomerLoc
Franchise Return	Franchise Return Head Contextual Model	FranchiseReturnHeadLoadEvent	Franchise Return page is Loaded	RMANum
		FranchiseReturnItemSelectionEvent	Items table row is selected	WfOrderNoItem

Import Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
ALC Finalization	ALC Order Finalize Contextual Model	AlcOrderFinalizeSelectionEvent	ALC Finalization results row selected.	ShipmentOrder
Customs Entry	Customs Entry Contextual Model	CustomsEntryLoadEvent	Customs Entry page is loaded	CustEntryId
Letter Of Credit	Letter Of Credit Head Contextual Model	FinalizeTransportationValueChangeEvent	Letter Of Credit Head page is loaded	VesselId VoyageFlightID EstDepartureDate
Letter Of Credit Order Selection	Letter Of Credit Order Contextual Model	LetterOfCreditHeadLoadEvent	Letter Of Credit Order table row is selected	LCReferenceNum

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Obligation	Obligation Contextual Model	LetterOfCreditOrderSelectionEvent	Obligation page is Loaded	Order Applicant Bank
Finalize Transportation	Finalize Transportation Contextual Model	ObligationLoadEvent	On value change of vessel, voyage flight, or estimated departure date	ObligationId
Transportation	Transportation Contextual Model	TransportationLoadEvent	Transportation page is loaded.	TransportationId

Item Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Item	Item Contextual Model	ItemSelectedEvent	Item page is loaded	Item
Item Children	Item Children Contextual Model	ItemChildSelectedEvent	Item Children table row selected.	Item
Item Children By Diff	Item Children By Diff Contextual Model	ItemChildDiffSelectedEvent	Item Children By Diff table row is selected.	Item
Item Location	Item Location Contextual Model	ItemLocSelectedEvent	Location table row is selected	Item Location
Item Location Inventory	Item Location Inventory Contextual Model	ItemLocInventorySelectionEvent	Item Location Inventory table row is selected	Item Location
Item Search	Item Search Contextual Model	ItemSearchItemSelectedEvent	Item Search results table row is selected	Item
Item Supplier	Item Supplier Contextual Model	ItemSupplierSelectedEvent	Supplier row selected.	Item Supplier
Item Supplier Country	Item Supplier Country Contextual Model	ItemSuppCountrySelectedEvent	Country of Sourcing row selected.	Item Supplier OriginCountry
Pack Details	Pack Details Contextual Model	PackDetailsSelectionEvent	Packs By Component table row selected.	Item
Related Item	Related Item Contextual Model	RelatedItemSelectedEvent	Related Items table row is selected	Item
Sales Issues By Location	Sales Issues By Location Contextual Model	SalesIssuesByLocSelectionEvent	Sales Issues By Location table row is selected	Item Location

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Simple Pack Item	Simple Pack Item Contextual Model	SimplePackItemSelectedEvent	Simple Pack Setup table row is selected	Item

Purchase Order Workflows

ADF Bundle: oracle.retail.apps.rms.procurement.view.RmsProcurementViewControllerBundle

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Order Detail	Order Detail Contextual Model	OrderDetailEvent	Allocations table row is selected	Order Item Location PhysicalWH Allocation DisplayCurrency DisplayUOM
			Items table row is selected	Order Item ItemParent Diff1 Diff2 Diff3 Diff4 OrderCurrency DisplayCurrency DisplayUOM
			Locations table row is selected	Order Item Location DisplayCurrency DisplayUOM
Order Distribution	Order Distribution Item Contextual Model	OrderDistItemSelectionEvent	Order Distribution table row is selected	Order Item Supplier Location

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Order	Order Header Contextual Model	OrderHeadLoadEvent	Order page is Loaded	Order Supplier ImportInd Department Location Status OrderCurrency OrderType
Order Search	Order Search Contextual Model	OrderSearchOrderSelectedEvent	OrderSearchOrderSelectedEvent: Order Search results table row is selected	Order Supplier Status Currency

Replenishment Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Buyer Worksheet	Buyer Worksheet Contextual Model	BuyerWorksheetSelectionEvent	Table row is selected	Item Supplier SourceType Location DisplayCurrency
Replenishment Attributes	Replenishment Attribute Contextual Model	ReplAttributeLoadEvent	Replenishment Attribute page is loaded	Item Location
Replenishment Attribute Search	Replenishment Attribute Search Contextual Model	ReplAttributeSearchSelectionEvent	Replenishment Search results table row is selected	Item Location
Substitute Items	Substitute Items Contextual Model	SubstituteItemSelectedEvent	Substitute Items table row is selected.	Item SubstituteItem

RTV Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Return To Vendor	Return To Vendor Head Contextual Model	ReturnToVendorEvent	Item table row is selected.	Rtv Item Location Supplier DisplayCurrency InventoryStatus DisplayUOM
			Return to Vendor page is loaded.	Rtv Location Supplier Status DisplayCurrency DisplayUOM

Shipment and Receipt Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Receipt Adjustment by Cost	Receiver Cost Adjustment Item Contextual Model	ReceivingCostAdjItemSelectionEvent	Receipt Adjustment By Cost page table row is selected	Order Supplier Department Item Location DisplayCurrency
Shipment	Shipment Head Contextual Model	ShipmentPageEvent	Details table row is selected	Shipment Item Carton
			Shipment page is loaded.	Shipment ASN BOL EstArrivalDate InvMatchDate ReceiveDate ShipDate NotBeforeDate NotAfterDate ToLoc Status

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Shipment Search	Shipment Search Contextual Model	ShipmentSearchSelectionEvent	Shipment Search results table row is selected	Shipment Order BOL ToLoc
Stock Order Reconciliation	Stock Order Exception Detail Contextual Model	StockOrderExceptionEvent	Carton Level Dispositions table row is selected	Carton Shipment BOL FromLoc ToLoc
			Stock Order Exceptions table row is selected	BOL FromLoc ToLoc Shipment

Stock Count Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Stock Count Results	Stock Count Results Contextual Model	StockCountResultsSelectionEvent	Items and Count Locations tables row is selected	StockCountId Item Location
Unit Variance and Adjustment	Unit Var Adjustment Location Contextual Model	UnitVarianceAndAdjustmentEvent	Details table row is selected	StockCountId Location Department Class SubClass
			Location table row is selected	StockCountId Location Item
Value Variance and Adjustment	Value Var Adjustment Location Contextual Model	ValueVarAdjLocSelectionEvent	Value Variance and Adjustment tables row is selected	StockCountIdLocation
Virtual Warehouse Distribution	Virtual Warehouse Distribution Contextual Model	VirtualWhDistSelectionEvent	Physical Warehouse/Items table row is selected	StockCountId Item PhysicalWh

Transfer Workflows

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Mass Return Transfer	Mass Return Transfer Head Contextual Model	MassReturnTransferEvent	Mass Return Transfer page is loaded	MRT Warehouse Status Supplier DisplayCurrency
			Item table row is selected	MRT Item DisplayCurrency
			Locations table row is selected.	MRT Item Location DisplayCurrency
Transfer Details	Transfer Detail Contextual Model	TransferDetailSelectionEvent	Transfer Details table row is selected	Transfer Item ItemParent Diff1 Diff2 Diff3 Diff4 InventoryStatus FromLoc ToLoc Finisher DisplayCurrency DisplayUOM DisplayLeg
Transfer	Transfer Head Contextual Model	TransferHeadLoadEvent	Transfer page is loaded	Transfer FromLoc ToLoc Finisher Status DeliveryDate
Transfer Search	Transfer Search Contextual Model	TransferSearchSelectionEvent	Transfer search results table row is selected	Transfer FromLoc ToLoc Finisher Status

Sales Audit

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Store Day Search	Store Day Search Contextual Model Name	OnloadEvent	Store Day Search page is loaded	val1 (Store)
Store Day Search	Store Day Search Contextual Model Name	OverShortHistorySelectedEvent	When a user selects a row in the results table	val1 (Store)
Store Day Summary	Maintain Store Day Contextual Model Name	OnloadEvent	Store Day Summary page is loaded	val1 (Store) val3 (Store Sequence Number) currency
Transaction	Maintain Transaction Contextual Model Name	TableSelectedEvent	The user selects an item in the Item table	val1 (Store) val2 (Tranaction Sequence Number) itemSeqNo item
Tender Summary	Tender Summary Contextual Model Name	TableSelectedEvent	Results are returned in the Tender Summary page	val1 (Store)currency

Pricing

Workflow	Contextual Model Name	Action Type	Event	Parameters
Price Change Group	Price Event Contextual Area	PriceChangeItemSelectedEvent	When the user selects a row in the price change group maintenance screen.	Item ItemDesc DiffDesc Location LocationDesc LocationType ZoneDisplayId ZoneDesc Currency BatchGenExcl RandomNo ZoneID PeType (PC, CLR) MaintItemWsId MaintLocWsId

Workflow	Contextual Model Name	Action Type	Event	Parameters
Clearance Group	Price Event Contextual Area	PriceChangeItemSelectedEvent	When the user selects a row in the Clearance group maintenance screen.	Item ItemDesc DiffDesc Location LocationDesc LocationType ZoneDisplayId ZoneDesc Currency BatchGenExcl RandomNo ZoneID PeType (PC, CLR) MaintItemWsId[1] MaintLocWsId[2]
Price Inquiry	Price Event Contextual Area	PriceInquiryItemSelectedEvent	When the user selects a row in the Price Inquiry Search screen.	Item ItemDesc Location LocationDesc LocationType Currency SearchStartDate SearchEndDate ActionDate LocationPricing WorkspaceId Application
Conflicts	Price Event Contextual Area	PriceChangeItemSelectedEvent	When the user selects a row in the Conflict Check Error Maintenance screen.	ConflictId RandomNo

1 Row ID in the item table.

2 Row ID in the location table.

Invoice Matching

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Summary Match - Detail Match Item View	Detail Match Contextual Area	DetailToleranceRange	When the user enters the Detail Match screen.	SessionId WorkspaceId lang locale accessibility ItemViewId InvcItemViewId RowType (STYLE, SKU, INVC, RCPT) StagedPayloadId
Summary Match - Detail Match Item View	Detail Match Contextual Area	qtyComparison	When a user clicks on an item in the item table in Detail Match.	SessionId WorkspaceId lang locale accessibility ItemViewId InvcItemViewId RowType (STYLE, SKU, INVC, RCPT) StagedPayloadId
Summary Match - Detail Match Item View	Detail Match Contextual Area	costComparison	When a user clicks on an item in the item table in Detail Match.	SessionId WorkspaceId lang locale accessibility ItemViewId InvcItemViewId RowType (STYLE, SKU, INVC, RCPT) StagedPayloadId
Discrepancy Review List	Discrepancy List Contextual Area	suppSiteEventBinding	When a user clicks in a row in the search results table.	siteId (supplier site) sessionId lang locale accessibility

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Discrepancy Review List	Discrepancy List Contextual Area	qtyEventBinding	When a user clicks in a row in the search results table.	workspaceId discViewId sessionId item lang locale accessibility
Discrepancy Review List	Discrepancy List Contextual Area	costEventBinding	When a user clicks in a row in the search results table.	workspaceId discViewId sessionId item lang locale accessibility
Summary Match - Invoice Summary Match	Summary Match Contextual Area	SummaryTolerance Range	When a user clicks on an item in the table in Summary Match.	siteId (supplier site) sessionId workspaceId stagedPayloadId lang locale accessibility
Summary Match - Invoice Summary Match	Summary Match Contextual Area	supplierSiteEvent	The user enters the Summary Match screen.	siteId (supplier site) sessionId stagedPayloadId lang locale accessibility

Allocation

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Allocation Maintenance (What-if Allocation only)	Allocation Maintenance Contextual Area	itemSourceSelectionEvent	The user selects a row in the Review table	sessionId allocId item diff1 diff2diff3diff4

Workflow	Contextual Model Name	Action Type	Event Description	Parameters
Allocation Maintenance	Allocation Maintenance Contextual Area	itemLocSelection Event	The user selects a row in the Location table	sessionId location item diff1 diff2 diff3 diff4
Allocation Maintenance	Allocation Maintenance Contextual Area	itemForcastSelect ionEvent	The user selects a row in the Location table	sessionId item diff1 diff2 diff3 diff4 location locType