Oracle® Retail WebTrack

User Guide

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Preface

Oracle Retail Design User Guide is a complete guide to the user of Oracle Retail WebTrack.

Audience

This document is intended for the users of Oracle Retail WebTrack.

Related Documents

You can find more information about this product in these resources:

- Oracle Retail WebTrack Release Notes
- Oracle Retail WebTrack Online Help
- Oracle Retail WebTrack Configuration Guide
- Oracle Retail WebTrack Operations Guide
- Oracle Retail Design Operations Guide
- Oracle Retail Design Release Notes
- Oracle Retail Design User Guide
- Oracle Retail Design Online Help
- Oracle Retail Design Configuration Guide
- Oracle Retail Integrator User Guide
- Oracle Retail Retail Server Installation Guide
- Oracle Retail Retail Server Data Model
- Oracle Retail Integrator User Guide
- Oracle Retail Integrator Online Help

Customer Support

- https://metalink.oracle.com

When contacting Customer Support, please provide:

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

1 Introduction to WebTrack

Oracle Retail WebTrack is a web-based, collaborative critical path management tool that allows the retailer to manage tracks and specific events for all key business processes within the organization. While templates can be defined to track any process, Oracle Retail WebTrack was designed to manage product development projects and purchase orders to help save time within the supply chain. Templates are defined by the retailer to include specific events and associated lead times and will be leveraged to create the tracks that will ultimately manage the specific project and purchase orders. In order for tracks to be created, the foundation data for the project or purchase order needs to be completed in advance.

Once this information is available, tracks can be created with specific event owners that will be accountable for managing specific events within the track. Access to all tracks in one place will improve visibility to changes and automatic email alerts provide reminders to event owners if events become late or overdue. As updates and changes are made to the track, a diary of all activity is logged. Finally, powerful reporting on track data allows retailers to accurately report on progress and manage by exception allowing the retailer to focus on priority issues and make fact-based decisions. Using Oracle Retail WebTrack to work collaboratively with trading partners, there will be greater ownership for events, reductions in lead times, improvement in communication and reduced costs through the supply chain.

The system facilitates collaboration that leads to ‘one version’ of the truth through the following capabilities:

- The web-based collaborative architecture enables everyone in the supply chain to have secure access to the same information improving visibility, providing one version of the truth and allowing pro-active management of projects.
- The system’s flexible, template-based process allows the retailer to determine the key events, dependencies, owners, and lead times that will be used to manage processes immediately providing a mechanism for business process re-engineering and a consistent process approach throughout the internal and external community.
- Sophisticated dependencies between events provide flexibility and allow the retailer to determine the complexity they would like to reflect within the track management process.
- Nested track functionality provides the flexibility to track all events with varying priorities within the same tool. A parent track might be used to track the high-level events related to a process and the nested child track will be linked to the parent track and used to track the lower-level events that still require tracking and visibility.
- The system’s mass change capability enables an efficient approach to maintaining track details improving the overall accuracy and timeliness of the data tracked within the solution.
- Automated and manual diary entries provide improved controls and accountability over project management data. The ability to automatically send the diary entry as an e-mail improves timely communication.
- By centralizing key event data in one place, the system allows the client to evaluate performance of events, tracks, and trading partners, report event management progress accurately, and make strategic, fact-based decisions.

Oracle Retail WebTrack is a product of Oracle Retail’s Merchandising Solutions, which help you to improve quality, reduce costs and save time in the product development and sourcing process.

How Webtrack Works

Events

Events are the specific tasks that are monitored by users within Oracle Retail WebTrack. Events are the first things that need to be created within Oracle Retail WebTrack. Those events that are commonly used together to support a process may be grouped into a template, which is ultimately used to create a track. An event may be defined as a standard or optional event identifying whether or not it will always be a required step within the process. In addition, events can be considered parent events.

Within Oracle Retail WebTrack, there is a nested track concept. There may be nested tracks that support events within the master parent track. For example, within a parent track, there may be an event such as Specification Complete. While there are many steps that need to occur in order to complete the specification that should be tracked, the parent track owner did not want to have visibility to all of them within the parent track. Therefore, a nested track will be associated to the parent event Specification Complete indicating that there are other steps within a separate nested track that need to be completed for this event to be considered complete.

If an event will be defined as a parent event to a nested track, that relationship will be defined when the event is created. Specifically, a template of supporting events that will make up the nested track will be attached to that event. A parent event's completion is dependent on the completion of events in a nested track.

Once events are defined within Oracle Retail WebTrack, they are available to be assigned in templates.

Templates

Oracle Retail WebTrack uses the concept of templates to provide a mechanism for consistently creating tracks within the solution. Recognizing that the same business processes are used over and over, but with variations, Oracle Retail WebTrack provides templates as a way to store the group of events and associated lead times that commonly recur in a process. Templates can be used repeatedly and modified as needed in the track creation process.

The retailer is responsible for defining the templates that will be used within their organization. The actual creation of the templates helps to question steps and lead times that are being completed within the organization today and immediately introduces process consistency to the processes managed within the organization.

Two types of templates are created within Oracle Retail WebTrack based on the type of process that will be supported:

1. Project Templates
2. Purchase Order Templates

The templates are organized by type and within each type; the Oracle Retail WebTrack administrator can define a folder structure for storing the templates. For example, if different sets of templates will be created based on whether a product is imported or sourced domestically, the administrator may choose to create a Domestic folder and an Import folder to organize the templates. Additionally, if lead times vary within the templates based on the country that the product is sourced; a sub-folder structure of each country name could be defined below the Import folder structure. The administrator has complete flexibility in how they choose to create the folders and store the templates. Ultimately, they should keep in mind that this is the same folder structure that the users will see when they are selecting templates during track creation.

Templates can be created from scratch or by copying and modifying an existing template that contains many of the same events. There are five key steps associated with creating a template.

1. Adding Events
2. Defining Dependencies or Sequencing and Cancellation Rules between Events
3. Confirming Type of Event
4. Event Accountability
5. Defining Lead Time

Projects and Purchase Orders

Oracle Retail WebTrack requires that a project or purchase order be created before a track can be created. Project creation is a simple approach to setting up data to be tracked. Specifically, the only information that is required is a project name, associated department, and due date. The user can also reference a project number, value, and comments if appropriate. Purchase order creation requires that colors, products, and suppliers have been previously created in Oracle Retail WebTrack. As the purchase order is being created, the user is required to enter a purchase order number, supplier, due date, products and applicable quantities. Various options can be selected within the purchase order creation that will support how the purchase order is tracked. For example, the user can choose to track the order by product or by color. If the user determines to track by color, if there are multiple colors associated to each product, multiple tracks can be created when that purchase order track is created.

The Track

Once templates, projects and purchase orders have been created, tracks can be created within Oracle Retail WebTrack. The track is the primary record monitored and maintained within Oracle Retail WebTrack. The retailer will create a track within their enterprise for a single project or purchase order based on a selected template that has already been set up within the solution. The specific user that creates the track will be considered the track owner and will be ultimately accountable for the delivery of the project or purchase order. When creating the track, the track owner goes through a similar process that was followed during template creation. However, different from template creation, the track owner is being specific about certain events, users, and dates for the particular project or purchase order being tracked. While they follow similar steps, it is important that the specific information for that track is set up properly as it will become the baseline expectation for this project or purchase order. In addition, the track owner needs to be aware of any nested tracks that may be associated to the track being created. The key steps associated to creating a track are referenced below:

1. Select a Project or Purchase Order to be Tracked
2. Select Template
3. Select Users
4. Edit Default Settings
5. Publish Track

Email Alerts

WebTrack facilitates communication by sending automatic email alerts when specific conditions are met. Some examples of when Email alerts may occur include:

- A track is created and event owners are notified.
- An event is added to a track.
- An event is completed or cancelled.
- An event is coming due or already late.
- An event contact is changed.
- An event plan or revised date is changed.
- There is a change in event or track status.
- A track is canceled, created, or created by a split.
- A track is suspended or unsuspended.
- A track owner is changed.
- A diary entry is made.

User Types and Security

Oracle Retail WebTrack supports user security and enables certain permissions to be defined based on each user's setup and configuration. The following functions are defined based on your username:

User Types – As users are setup, a specific user type is assigned representing their roles and responsibilities. Within template creation, the administrator can define a certain user type to be responsible for an event. When the track is being created, usernames based on the user type assigned to the event will be defaulted as possible event owners.

Permissions – Depending on your role within Oracle Retail WebTrack, permissions can be assigned to a user that allow them to access certain functions of the system. For example, a user may be assigned to only have access to the Reports functionality or as a Track Maintenance User only preventing them from creating tracks. If no restrictions are defined, the user has the ability to perform all functions within the system. In addition, permissions allow users to perform special plan data change or apply new template functions.

Oracle Retail Integrator

While Oracle Retail WebTrack can be used as a standalone system, Oracle Retail Integrator can be leveraged to automate and integrate data into and out of Oracle Retail WebTrack. For example, some enterprises may choose to import purchase order data into Oracle Retail WebTrack from their external purchasing system instead of manually set-up purchase orders within Oracle Retail WebTrack. Oracle Retail Integrator uses XML-based file formats to communicate data between the systems.   The following imports and exports are supported:

- Color Palette Import
- Item Import
- Division Import
- Purchase Order Import
- Project Import
- Event Import
- Event Due Date Export
- Track Details Export

Webtrack Business Process

Administration Console

Set Up Enterprise

- Set up enterprise code
- Set up enterprise logo
- View services

Set Up Application

Maintain Locations and Users

- Set up enterprise locations
- Set up organization and user types
- Set up users
- Set up trading partners

Maintain Products and Tracks

- Define track events
- Define track templates
- Define product attributes
- Define product colors
- Define seasons

Customize WebTrack

- Define system generated email messages
- Define system options
- Define reason codes
- Define terminology
- Configure track lists
- Configure resources

User Console

Track Creation User (No Restrictions)

- Add, edit or delete project data
- Add, edit or delete product data
- Manage orders
- View track lists and details
- Create tracks
- Edit tracks
- Maintain Track Events
- View or print reports
- Set up preferences

Track Maintenance User

- View track lists and details
- Edit tracks
- Maintain Track Events
- View or print reports
- Set up preferences

Reports Only User

- View or print reports
- Set up preferences

Webtrack Navigation

This section describes how to navigate within WebTrack. The following topics are included:

- Instructions to log on to and exit WebTrack
- Instructions to navigate within a window
- Instructions to sort and filter columns

Log on to and Exit Webtrack

Note: The way that you access WebTrack depends on how the system is set up. If you are running on www.retail.com, launch your browser and navigate to the www.retail.com url. Contact you system administrator for instructions specific to your enterprise. After you have started Oracle Retail Webtrack, you are prompted to log on to the system.

Log On to Webtrack

1. On the Login window, enter your user name in the Username field.
2. In the Password field, enter your password.
3. In the Enterprise ID field, enter your enterprise ID
4. Click **Log In**. The list of applications you have permission to access in the window.
5. Select **Webtrack**.

Exit Webtrack

1. From the User Console, select Logout.
2. You are returned to the Login window.

Navigate Within a Window

Use a Drop-Down List

Some fields can accept values only from a predefined list of options. Such fields have a down arrow button on the right side of the field.

1. Click the down arrow button. A drop-down list of options displays.
2. Select a value from the drop-down list. The selected option is entered in the appropriate field.

Sort and Filter Information

Many windows allow you to sort data by clicking column headings

- To sort the list, click any underlined column heading. An arrow indicates the column that is currently sorted, as well as the order, ascending or descending.
- To reverse the current sort order, click the same column heading again.
- To lock the column that has been filtered, right click on the header. It turns red.
- To unlock the column, right-click it again.

Minimum Requirements

Note: Products associated with mydomain.com run on PC or Macintosh systems using the minimum configuration requirements listed below. However, better response times are achieved using the recommended configurations. Note that running Web-based applications stresses connectivity more than Web browsing.

Internet Connection Requirements Common to Both PC and Macintosh Systems

System component	Minimum requirements	Recommended requirements
Internet connection	56K Internet connection	DSL/T1 or cable modem internet connection
Proxy servers	We advise customers to ensure that their servers are sufficiently well configured to support the number of users (for example, CPU speed, memory, network connectivity).	

Mail Server Requirements

Oracle Retail WebTrack must use a simple mail transfer protocol (SMPT) mail server configured to operate over Transmission Control Protocol (TCP) port 25. SMPT is the internet's standard host-to-host mail transport protocol. Most Unix systems include sendmail, a widely-used SMTP server for email.

Requirements for PC Systems

System component	Minimum requirements	Recommended requirements
Hardware	Pentium 233Mhz processor 128Mb RAM	Pentium 1.1Ghz processor 512Mb RAM
Desktop resolution	1024 x 768 pixels	1024 x 768 pixels
Operating system	MS Windows 98SE or Windows NT 4.0 SP 3 plus Sun Java 1.5	MS Windows 2000 or Windows XP with the latest service pack plus Sun Java 1.5.0
Software	MS Internet Explorer 5.01 SP3 or above – downloadable from http://www.microsoft.com/ie Also, see the section, ‘Browser support’, later in this chapter.	MS Internet Explorer 6.0 with the latest service pack – downloadable from http://www.microsoft.com/ie Also, see the section, ‘Browser support’, later in this chapter.

Requirements for Macintosh Systems

System component	Minimum requirements	Recommended requirements
Hardware	400 MHz processor 128Mb RAM	800 MHz processor 256Mb RAM
Desktop resolution	1024 x 768 pixels	1024 x 768 pixels
Operating system	Panther Mac OS X v10.3.1 plus Java 1.4.2	Tiger Mac OS X v10.4 plus Java 1.4.2
Software	Safari 2.0 downloadable from http://www.apple.com/safari/download/ Also, see the section, Browser Support below.	Safari 2.0 downloadable from http://www.apple.com/safari/download/ Also, see the section, Browser Support below.

Browser Support

Minimal

At a minimum, a Windows browser must support Java 1.1 to run the application. For Macintosh users, the browser must support Java 1.3.1 to run the application.

Recommended

Oracle Retail recommends browsers currently supported by Microsoft on the PC and by Apple on the Macintosh.

The Internet Explorer support lifecycle information can be found at the following internet location (shown also in the screen capture below to offer context in the event that the site changes):

- http://www.microsoft.com/windows/lifecycle/ie_LevelOne.aspx

The Safari support lifecycle information can be found at the following internet location (shown also in the screen capture below to offer context in the event that the site changes):

- http://www.apple.com/support/safari/

2
WebTrack Administration

Webtrack System Administration

WebTrack system administration allows you to set up and maintain WebTrack for your Enterprise.

Through the Administration Console you can set up features and default values for the Enterprise and the WebTrack application. You can maintain information at the enterprise and application level.

Enterprise

The Enterprise maintenance area allows you to incorporate corporate information into the WebTrack interface. You can also view services enabled for your enterprise.

Application

The Application maintenance section allows you to maintain the information that users can view in the system. You can maintain information for the following user areas:

- **Maintain locations and users**
  - Set up enterprise locations
  - Set up organization and user types
  - Set up users
  - Set up trading partners
- **Maintain products and tracks**
  - Define track events
  - Define track templates
  - Define product attributes
  - Define product colors
  - Define seasons
  - Upload track report templates
- **Customize WebTrack**
  - Define system generated email messages
  - Define system options
  - Define reason codes
  - Define terminology
  - Configure track lists
  - Configure resources

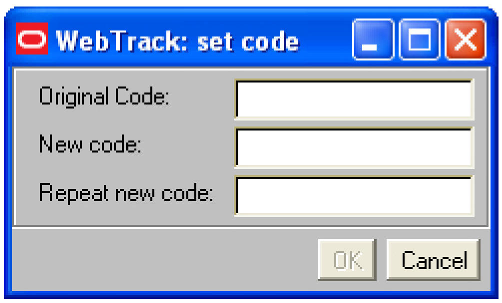
Set Up the Enterprise

Set Up Enterprise Code

When your enterprise is established, an enterprise code or enterprise ID is set-up to differentiate your organization from other enterprises set up on the exchange. This enterprise code is used with the username and password when each of your enterprises' users log in to Oracle Retail Webtrack. For security purposes, if you would like to change this code, it can be done via the Enterprise Code option.

Change the Enterprise Code

1. On the Administration Console, click **Enterprise Code**. The Set Code window opens.



Set Code Window

2. In the Original Code field, enter the code assigned to your organization by Oracle Retail.
3. In the New Code field, enter the new code.
4. In the Repeat New new Code code field, reenter the new code.
5. Click **OK** to save the new Enterprise code.
6. To discard your changes and restart the procedure close the dialog box, click **Cancel**.

Set Up Enterprise Logo

You can maintain the company logo displayed in the WebTrack application. When you change the logo in the Set Logo window, the logo will be changed on the Administration Console and on the User Console.

Add the Company Logo

1. On the Administration Console, click **Enterprise Logo**. The Set Logo window dialog box opens.

Set Logo Window

2. Click **Choose Logo**.
3. Navigate to and select the file containing the image of your logo.

> **Note:** The logo image file must be a .gif, .jpeg, or .jpg.

4. Click **Open**.
5. Click **Update Logo**. WebTrack displays the new logo.

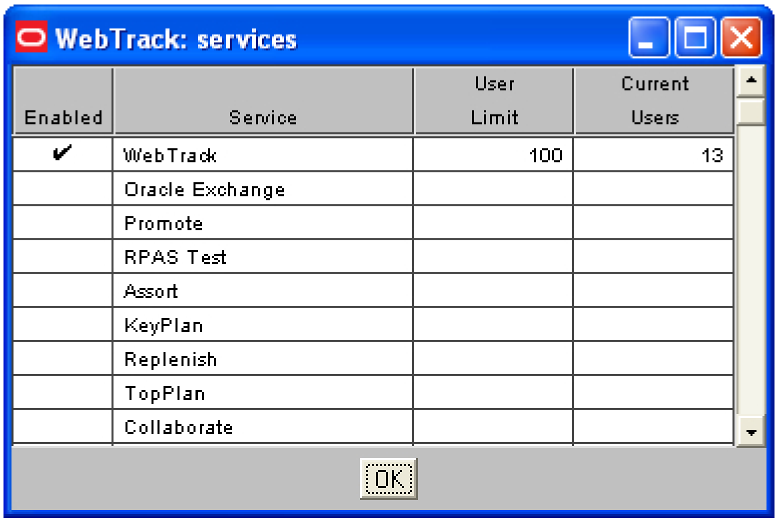
> **Note:** After you click **Update Logo**, you cannot cancel your changes.

View Services

With WebTrack, your Enterprise's e-service license agreement with Oracle Retail defines the number of users you will be able to set up in your enterprise. You can view this information in the WebTrack Services window.

View E-Services Subscription Information

Navigate: On the Administration Console, click **Services**. The read-only Services window opens.



Services Window

1. On the Services window, you can:
   - View the subscription information for your enterprise. A check mark in the Enabled column indicates that you can access that e-service in your current subscription agreement.
   - View the number of users at your Enterprise that can use each e-service.
   - View the current number of users at your Enterprise configured for each e-service.

   > **Note:**The software license counts each user once. If an administrator also configures a user account for him or herself, both accounts are counted.

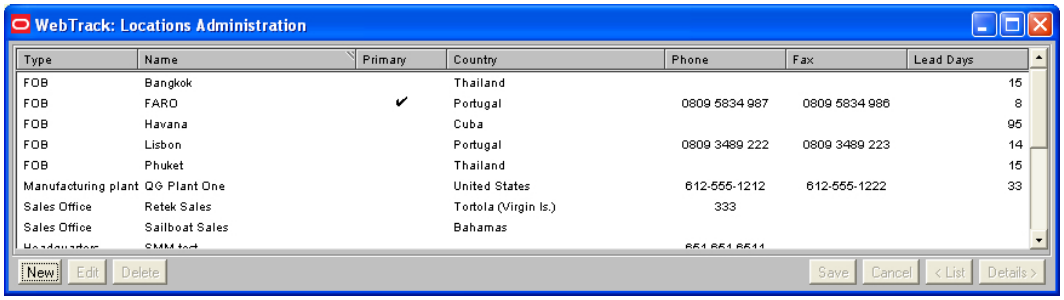
2. To change your service user limit, contact https://metalink.oracle.com.
3. After viewing the information, click **OK** to close the window.

Set Up the Application

Maintain Locations and Users

The Locations Administration windows allow you to define the locations in your enterprise. Locations can be headquarters, manufacturing plant, retail outlet, sales office, or warehouse. You can maintain contact information

Navigate: On the Administration Console window, click **Locations**. The list view of the WebTrack Locations Administration window opens.

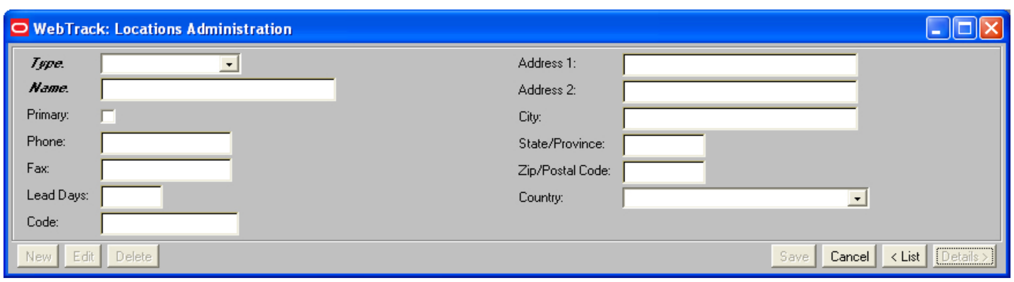


WebTrack Locations Administration window

Add a Location

Note: You cannot delete a location that is currently in use.

1. On the WebTrack Locations Administration list view window, click **New**. The details view of the Locations Administration window opens. The entry fields are enabled.



Locations Administration window - Details View

2. Enter the relevant information in the fields. Entries are required for these fields:
   - Type
   - Name
3. Click **Save**. The new location is added to the database.
4. Click **<List** to return to the list view. The new entry on the list.
5. Click the close window button to return to the Administration Console window.

Edit a Location

1. On the WebTrack Locations Administration list view window, select the location.
2. Click **Edit**. The details view of the Locations Administration window with its fields enabled.
3. Modify the records for the selected location.
4. Click **Save** to save the changes to the database.
5. Click **List** to return to the list view. The modified location on the list.
6. Click the close window button to return to the Administration Console window.

Delete a Location

1. On the WebTrack Locations Administration list view window, select the name of the location that you wish to delete.

   Note: You cannot delete a location that is currently in use.

2. Click **Delete.** A dialog box to confirm your decision.
3. To proceed, click **OK**. The location is permanently deleted from the list and the database.
4. Click **List** to return to the list view. The location is no longer listed.
5. Click the close window button to return to the Administration Console window.

View a Location

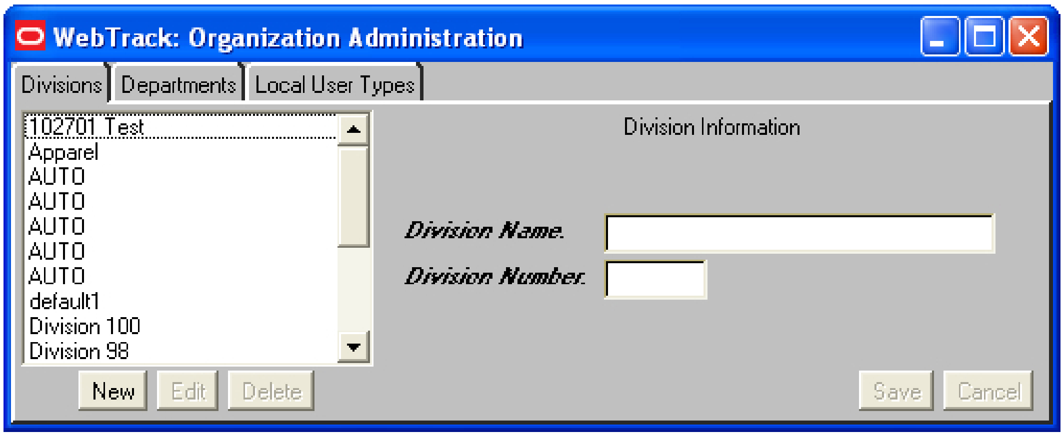
1. On the WebTrack Locations Administration list view window, select a location.
2. Click **Details >**. The details view of the WebTrack Locations Administration window opens.
3. Click **< List** to return to the list view.
4. Click the close window button to return to the Administration Console window.

Set Up Organization and User Types

The Organization Administration function allows you to identify the divisions and departments in your Enterprise that will use WebTrack. Additionally, you can define the local user types your organization uses. A local user type is a way to group users with similar responsibilities in the system.

When you set up users in WebTrack, you assign the departments, divisions, and local user types user have access to throughout WebTrack

Navigate: On the Administration Console, click **Organization**. The WebTrack Organization Administration window opens.



WebTrack Organization Administration window

Add a Division

1. On the Divisions tab, click **New**. The WebTrack Organization Administration entry fields are enabled.
2. In the Division Name field, enter the name of the new division. An entry is required.
3. In the Division Number field, enter the number that identifies this division. An entry is required.
4. Click **Save**. The database is updated with the new entry.
5. Click the close window  button to return to the Administration Console window.

Edit a Division

1. On the Divisions tab, select the name of the division in the list that you want to edit.
2. Click **Edit**. The entry fields at the right are enabled and Edit Division above them.
3. Modify the information in the entry fields.
4. Click **Save**. The database is updated with the new entry.
5. Click the close window  button to return to the Administration Console window.

Delete a Division

1. On the Divisions tab, select the name of the division in the list that you want to delete.

> **Note:** You cannot delete a division that is currently in use.

2. Click **Delete**. A dialog box to confirm your decision.
3. To proceed, click **OK**. The division is deleted from the list
4. Click the close window button to return to the Administration Console window.

Add a Department

1. On the Organization Administration window, click on the **Departments tab**. A list of departments and Department Information fields are displayed.
2. Click **New**. The three fields to the right are enabled.
3. In the Department name field, enter the name of the new department.
4. In the Department number field, enter the number that will be used to identify this new department.
5. In the Division field, select the division associated with this new department from the drop-down list.
6. Click **Save**. The database is updated with the new entry.
7. Click the close window button to return to the Administration Console window.

Edit a Department

1. Select the department name to edit. The department name is highlighted.
2. Click **Edit**. The three fields to the right are enabled.
3. Edit the details as is necessary.
4. Click **Save**. The database is updated with the new entry.
5. Click the close window button to return to the Administration Console window.

Delete a Department

1. On the Organization Administration window, click on the **Departments tab**. A list of departments and Department Information fields are displayed.
2. Select the department name to delete.

> **Note:** You cannot delete a department that is currently in use.

3. Click **Delete**. A dialog box to confirm your decision.
4. To proceed, click **OK**. The department is deleted from the list.
5. Click the close window button to return to the Administration Console window.

Add a Local User Type

1. On the Administration Console, under Application Setup --> Locations and Users, click the Organization button.
2. On the Organization Administration window, click on the Local User Types tab. A list of user types and the User Type field opens.
3. Click **New**.
4. In the User Type field, enter the role you want to assign to users.
5. Click **Save**. The database is updated with the new entry.
6. Click the close window button to return to the Administration Console window.

Edit a Local User Type

1. On the Organization Administration window, click on the Local User Types tab.
2. Select the user type to edit. The user type is highlighted.
3. Click **Edit**.
4. Edit the enabled fields as necessary.
5. Click **Save**. The database is updated with the new entry.
6. Click the close window button to return to the Administration Console window.

Delete a Local User Type

1. On the Organization Administration window, click on the Local User Types tab.
2. Select the user type to delete. The user type is highlighted.
3. Click **Delete**. A dialog box to confirm your decision.
4. To proceed, click **OK**. The local user type is deleted from the list.
5. Click the close window button to return to the Administration Console window.

Set Up Users

Each user must be set up by an administrator. There are two types of users, administrators and users. Administrators have access to and can maintain the administration console.

Users have access to the User Console of WebTrack. They cannot maintain any of the system level settings. A user's permissions may be further limited by scope set by the administrator. Scope defines which departments a user has access to maintain tracks for.

There are four user types in WebTrack. A user type allows or limits the system permissions that a user has in WebTrack.

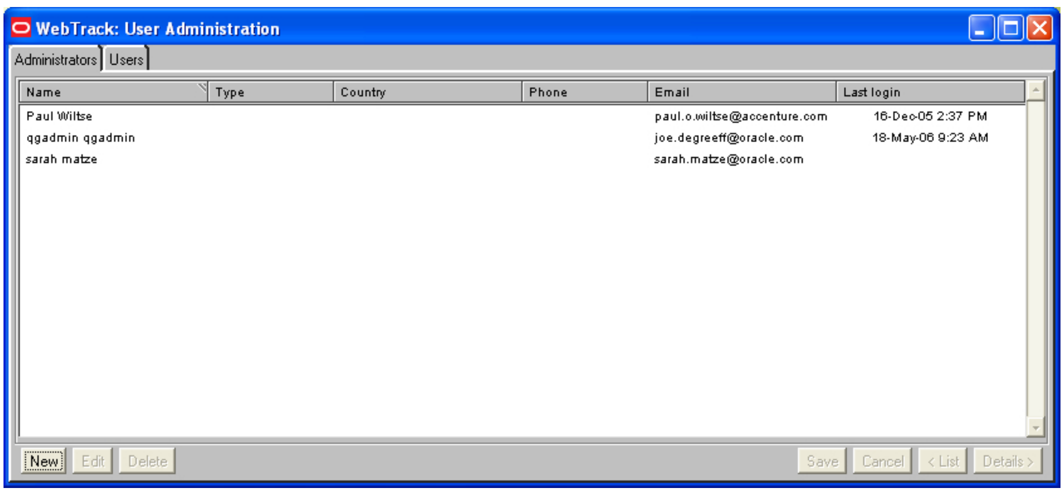
The user types are:

- **Track Maintenance Only:** Users can view, update, and report on tracks within the departments they have permission to access. Users cannot create projects, purchase orders, or tracks. This is a recommended setting for users who do not need to create tracks, as it will provide improved application performance.
- **Reports Functionality Only:** Users can view and report on tracks within the departments they have permission to access. Users cannot create or update tracks. This is a recommended setting for users who do not need to create or update tracks, as it will provide improved application performance.

- **Apply Track Owner to Apply New Template:** Users can apply a new template to existing tracks that they have created. After the new template is applier, users can perform a mass re-calculation of plan dates based on the new template being applied.
- **Allow Track Owner to Set Plan Dates:** Users can revise plan dates on existing tracks that they have created. The track owner will be able to update plan dates for all events in one step, without having to worry about accepting or rejecting the plan date change.

> **Note:** If no local user type is assigned to a user, the user can create, view, update, and report on tracks within the departments they have permission to access. The user will not have the ability to apply new templates or review plan dates.

Navigate: On the Administration Console, click **Users**. The WebTrack User Administration window opens.



WebTrack User Administration window

Add an Administrator

1. On the User Administration window on the Administrators tab, click **New**.
2. The details view of the Administrators tab opens. The entry fields are enabled. Enter necessary information in the fields. Required fields are:
   - First and last Name
   - E-mail
   - Username
   - New Password
   - Retype New Password

> **Note:** Save is not enabled until all required entries are made.

3. Click **Save** to save the changes.
4. Click the close window  button to return to the Administration Console window.

Edit an Administrator

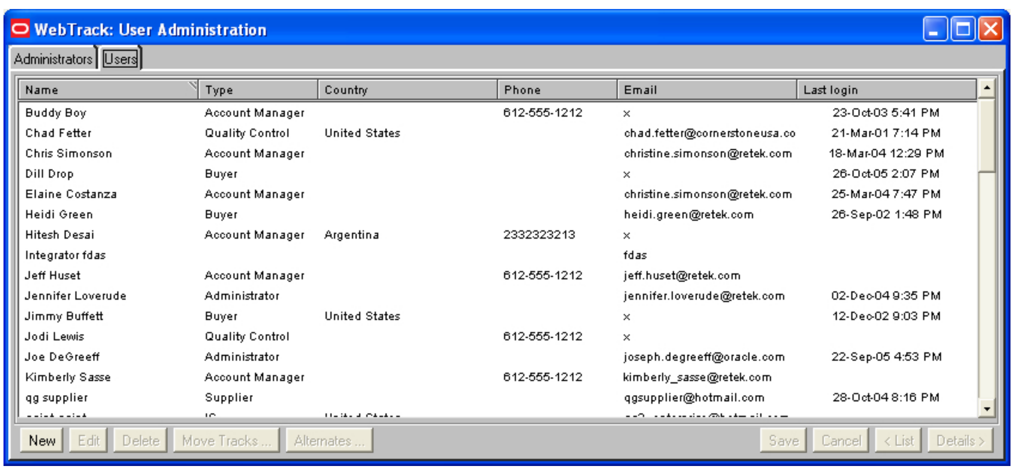
1. On the User Administration window, click on the **Administrators tab**. The Administrators tab list view opens.
2. Select the name of an administrator. All contact information is highlighted for that name.
3. Click **Edit**. The details list opens.
4. Select the fields you want to modify, and change the information.
5. Click **Save** to save the changes.
6. Click the close window button to return to the Administration Console window.

Delete an Administrator

1. On the User Administration window, click on the **Administrators** tab. The Administrators list opens.
2. Select the name of an administrator. All contact information is highlighted.
3. Click **Delete**. A dialog box to confirm your decision.
4. To proceed, click **OK**. The administrator's name is deleted from the list.
5. Click the close window button to return to the Administration Console window.

Add a User

1. On the WebTrack User Administration window, click on the **Users tab**. The Users list opens.



User Administration - List View

2. Click **New**. Three new tabs are displayed: Details, Scope, and Permissions.

Add user details

1. On the Details tab, enter necessary information about the new user. Entries are required in these fields:
   - First Name
   - Last Name
   - E-mail
   - Username
   - New Password
   - Retype New Password
2. Select or clear the Account Manager check box.

   Note: When selected, trading partners can see this user in your Enterprise and assign tracks to them. When the check box is cleared, the trading partner is unable to see or assign tracks to this user.

3. Select or clear the Review Only check box.

   Note: When selected, the user has read-only access, and cannot edit or update in WebTrack. If the check box is cleared, this user can edit and update in WebTrack.

4. Select items for Type, Country, and Location from the drop-down lists.

Define a user's scope

1. Select the **Scope tab**. The Scope tab opens.
2. In the Available Departments list, click on a department name to be assigned to the user. At least one Department is required to create a user.
3. Click > to move the department to the Selected Department list.
4. To remove a department from the Selected Departments list, select the department name. The Left Arrow at the center of the window is enabled. Click < to return the department to the Available Departments list.

Note: Save is not enabled until there are entries in all required fields.

Define a user's system permissions

1. Select the **Permissions tab**. The Permissions tab opens.
2. In the Enabled column, select WebTrack from the list of Services. The Available Types column lists the user roles for your Enterprise.
3. Select the Local Types Tab.
   a. In the Available Types list, select the role that applies to this user.
   b. Click > to move the role to the Selected Types list. To remove a role from the Selected Types List, select the role.
4. Select the Partner Types tab.
   a. From the Partner drop-down list, select the appropriate partner.
   b. Click on the entries in the Available Types list that apply to this user.
   c. Click > to add an available type. The type in the Selected Types column.

   Note: Save is not enabled until there are entries in all required fields.

5. Click the close window  button to return to the Administration Console window.

Edit user information

1. On the WebTrack User Administration window, click **Users tab**. The Users list opens.
2. Select the user name you wish to edit.
3. Click **Edit**. The Details tab with the entry fields enabled.
4. Change the information in any or all of the entry fields.
5. Click **Save** to save the changes.
6. Click the close window  button to return to the Administration Console window.

Delete a User

1. Select the name you wish to delete.
2. Click **Delete**. A dialog box to confirm your decision.
3. To proceed, click **OK**. The selected user is deleted from the list and the database.
4. Click **List** to return to the Users tab list view. The user's name is deleted from the list.
5. Click the close window button to return to the Administration Console window.

Move a Track

1. On the Users tab list view, select the name of the user whose tracks you wish to reassign to another.
2. Click **Move Tracks**. The Move Tracks window with the original user's name in the header.
3. From the drop-down list in the Department field, select the name of the department that you will be moving tracks from.
4. From the drop-down list in the Replace by: field, select the name of the user who will be responsible for the tracks.
5. Click **Apply** to save the changes.
6. Click the close window button to return to the Administration Console window.

Create alternates

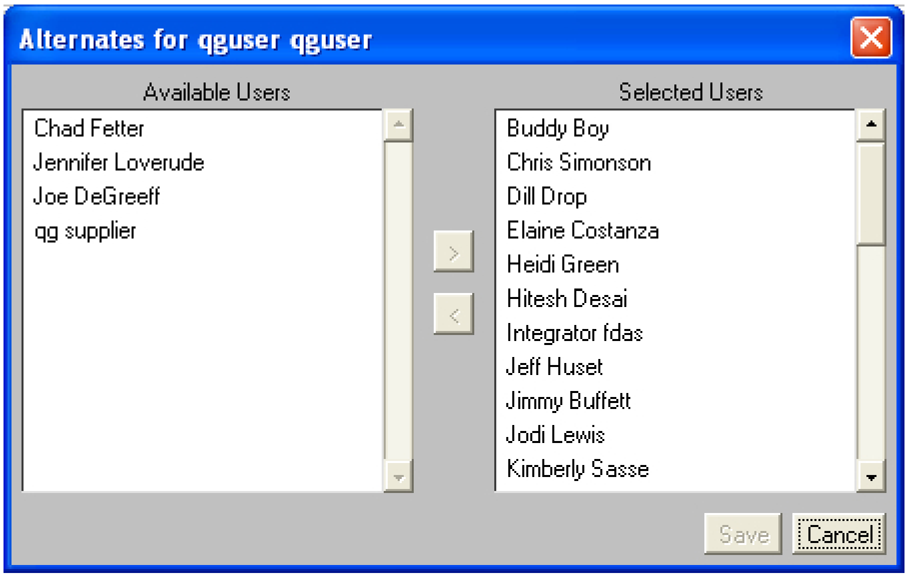
Administrators can choose to identify alternate users who can perform the following event updates on behalf of another user:

- Set revised dates
- Mark events complete
- Cancel events
- Create diary entries for events
- Send diary entries as email
- Show diaries
- Show relevant events only
- View track details
- View track owner details
- Mass changes
- Filter and change

Alternate users may access WebTrack functions and data based on the user types and the departments for which their user name has permissions. If an alternate makes an event update, the change will be made within the track, and the change will be logged within the diary under their user name. Alternates do not receive email alerts on events owned by other users.

If an event owner is locked, the alternates may perform updates on behalf of the locked user.

1. On the Users tab list view, select the name of the user for whom you want to assign alternates.
2. Click **Alternates**. The Alternates window with the original user's name in the header.



Alternates Window

3. From the Available Users pane, select the user name of the alternate you want to assign to the original user.
4. Click > to move the users you chose to the Selected Users pane.
5. To remove a user from Selected Users, select the name and click < to return the user name to the Available Users list.

> **Note:** There are no effective date ranges for alternate users. Once an alternate has been saved within User Administration, the alternate will be able to work on behalf of the original user until the alternate user has been removed as an alternate.

6. To save the changes, click **Save**. Click the close window  button to return to the Administration Console window.
7. To abandon your changes, click **Cancel**. You are returned to the Administration Console window.

Set Up Trading Partners

Business entities collaborate as trading partners. One partner initiates a trading relationship, creates product tracks and purchase orders, and shares this information with the other trading partner.

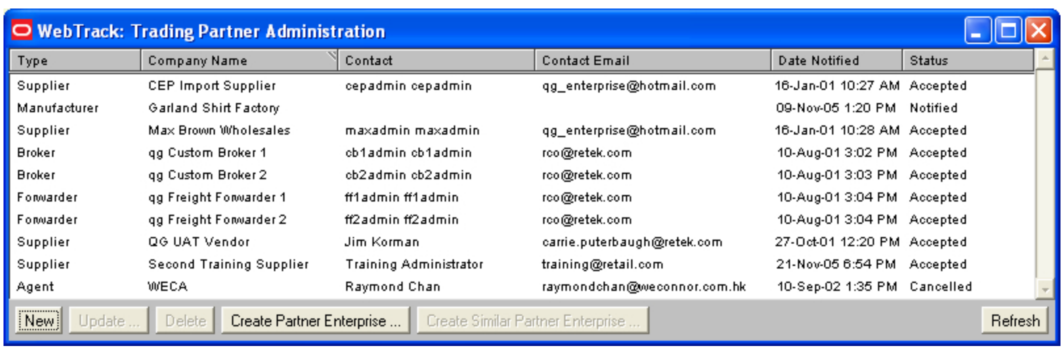
The WebTrack Trading Partner Administration window allows you to establish and maintain trading partner relationships with other companies within the Oracle Retail network.

Your Enterprise can initiate the trading partner relationship, or wait for another Enterprise to initiate the relationship. Once a relationship has been initiated, WebTrack system automatically sends an email alert message to the Company Administrator of the trading partner, to indicate that you want to set up a trading partner relationship with them.

To accept the relationship, the trading partner must log in and accept your trading partner relationship request. Upon acceptance, you immediately receive an email notification. On the Trading Partner Administration window, the status of this trading partner is set to Accepted.

You can set the scope of the relationship to limit the trading partner to areas of your business that are specifically appropriate for that partner.

Navigate: On the Administration Console, click **Trading Partners.** The Trading Partner Administration window opens.

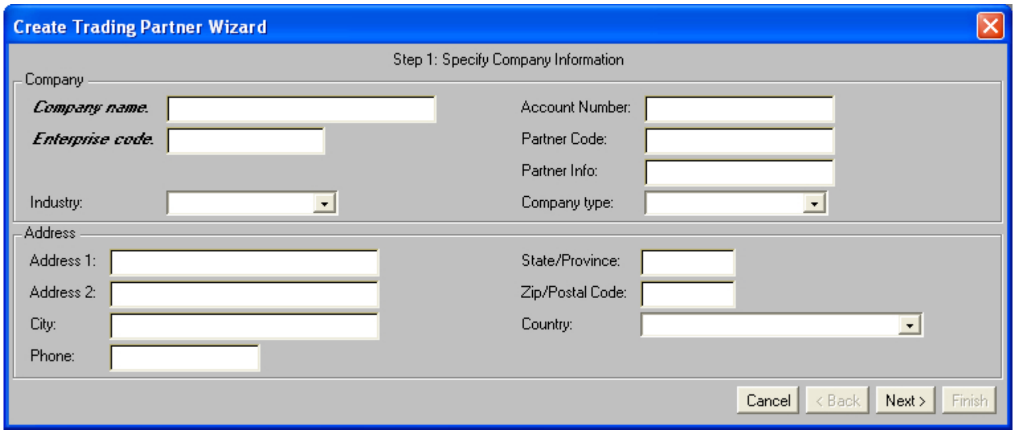


Type	Company Name	Contact	Contact Email	Date Notified	Status
Supplier	CEP Import Supplier	cepadmin cepadmin	qg_enterprise@hotmail.com	16-Jan-01 10:27 AM	Accepted
Manufacturer	Garland Shirt Factory			09-Nov-05 1:20 PM	Notified
Supplier	Max Brown Wholesales	maxadmin maxadmin	qg_enterprise@hotmail.com	16-Jan-01 10:28 AM	Accepted
Broker	qg Custom Broker 1	cb1admin cb1admin	rco@retek.com	10-Aug-01 3:02 PM	Accepted
Broker	qg Custom Broker 2	cb2admin cb2admin	rco@retek.com	10-Aug-01 3:03 PM	Accepted
Forwarder	qg Freight Forwarder 1	ff1admin ff1admin	rco@retek.com	10-Aug-01 3:04 PM	Accepted
Forwarder	qg Freight Forwarder 2	ff2admin ff2admin	rco@retek.com	10-Aug-01 3:04 PM	Accepted
Supplier	QG UAT Vendor	Jim Korman	carrie.puterbaugh@retek.com	27-Oct-01 12:20 PM	Accepted
Supplier	Second Training Supplier	Training Administrator	training@retail.com	21-Nov-05 6:54 PM	Accepted
Agent	WECA	Raymond Chan	raymondchan@weconnor.com.hk	10-Sep-02 1:35 PM	Cancelled

Trading Partner Administration window

Create a Trading Partner Enterprise

1. On the Trading Partner Administration window, click **Create Partner Enterprise**. The Create Trading Partner wizard opens.



Create Trading Partner wizard

2. On the Specify Company Information window:
    a. In the Company Name field, enter the name of the company you are creating an enterprise for.
    b. In the Enterprise Code field, enter the ID of the enterprise.
    c. Enter additional information about the enterprise, as necessary.
    d. Click **Next** >. The Create User window is displayed.
3. On the Create User window:
    a. In the Administrator area, enter information in the fields.
    b. To create a password for the administrator, click **Randomize**. A unique password is created.
    c. In the User area, enter information in the fields.
    d. To create a password for the user, click **Randomize**. A unique password is created.
    e. Click **Next** >. The Set Scope window opens.
4. On the Scope window:
    a. In the Available Departments list, click on a department name to be assigned to the user. At least one Department is required to create a user.
    b. Click > to move the department to the Selected Department list.
    c. To remove a department from the Selected Departments list, select the department name. The Left Arrow at the center of the window is enabled. Click < to return the department to the Available Departments list.
5. On the Permissions window:
6. In the Service field, select the service the trading partner has access to.
7. In the Available Permissions field, select a permission.
8. Click > to move the selected permissions to the Selected Permission column.

9. To remove a selected permission, highlight the permission in the Selected Permission column and click **<**.
10. To make the permission effective for all users:
    - In the Selected Permission column, click the appropriate permission in the Selected Permission column. A check mark in the All Users column.
11. Click **Finish**. The trading partner's enterprise can now have a relationships initiated.
12. Click the close window button to return to the Administration Console window.

Copy a Trading Partner

1. On the Trading Partner Administration window, click **Create Similar Partner Enterprise**. The Create Trading Partner wizard opens.
2. Update the enabled fields as necessary with the enterprise information of the trading partner you are creating.
3. Click **Next >** to move to the next window in the wizard.
4. Click **Back >** to move to the previous window in the wizard.
5. Click **Finish**. The trading partner's enterprise can now have a relationships initiated.
6. Click the close window button to return to the Administration Console window.

Initiate a Relationship With a Trading Partner

1. On the Trading Partner Administration window, click **New**. The Choose Enterprise window opens.
2. In the Company Type field, select the enterprise you want to establish a partnership with. To establish a relationship with all enterprise types, select all.
3. Select the desired company name in the Company field.

> **Note:** Only company names that have been added to the system will be displayed in the Company Type drop-down list.

4. Click **OK**.
5. Update partner information as necessary.
6. Click the close window button to return to the Administration Console window.

Accept or Decline a Relationship Initiated By a Trading Partner

> **Note:** You receive an e-mail notification when a trading partner attempts to initiate a trading partner relationship with you.

1. On the Trading Partner Administration window, find the new trading partner's Company Name. The name is italicized and its status is requested.
2. Double-click on the Company Name.
3. Accept or decline the relationship:
   - Click **Yes** to accept the relationship. On the Trading Partner Administration window, the Status of the trading partner is set to Accepted.
     or
   - Click **No** to decline the relationship. On the Trading Partner Administration window, the Status of the trading partner is set to Declined.
4. Update partner information as necessary.
5. Click the close window button to return to the Administration Console window.

Update Partner Information

1. On the Trading Partner Administration window, select the Company Name.
2. Click **Update**. The Update Partner Information with the Details, Scope, and Permissions tabs window opens.

Add partner details

1. Select the Details tab.
2. In the Account Number field, enter your account number with this trading partner.
3. In the Partner Code field, enter a code that identifies this trading partner.
4. In the Default Contact field, select the person you are in contact with at this trading partner.
5. In the Partner Information field, enter additional information about the partner

Define a partner's scope

1. Select the Scope tab.
2. In the Available Departments column, highlight the departments within your organization with which this Trading Partner will be associated.
3. Click > to move the selected departments to the Selected Departments column.
4. To remove a selected department, highlight the department in the Selected Departments column and click <.

Define a partner's permissions

1. Select the Permissions tab.
2. In the Service field, select the service the trading partner has access to.
3. In the Available Permissions field, select a permission.
4. Click > to move the selected permissions to the Selected Permission column.
5. To remove a selected permission, highlight the permission in the Selected Permission column and click <.
6. To make the permission effective for all users:
   - In the Selected Permission column, click the appropriate permission in the Selected Permission column. A check mark in the All Users column.
7. When you have completed updating partner information, click **OK** to save.

Click the close window button to return to the Administration Console window.

Delete a Trading Partner

Note: This procedure allows you to delete a trading partner with the option to reestablish a relationship:

1. On the Trading Partner Administration window, double-click on the **Company Name** of the trading partner you want to delete.
2. On the Confirm Cancel window, click **Yes**. The WebTrack system automatically sends an e-mail to inform your trading partner that you have terminated the trading partner relationship.
3. Click the close window button to return to the Administration Console window.

Delete a Trading Partner Permanently

Navigate: On the Administration Console, click **Trading Partners**. The Trading Partner Administration window opens.

1. On the Trading Partner Administration window, select the Company Name of the trading partner you want to delete.
2. Click **Delete**.
3. On the Confirm Delete window, click **Yes**. The trading partner is permanently removed from your menus. The WebTrack system automatically sends an e-mail to inform your trading partner that you have permanently terminated the trading partner relationship.
4. Click the close window button to return to the Administration Console window.

Maintain Products and Tracks

Define Track Events

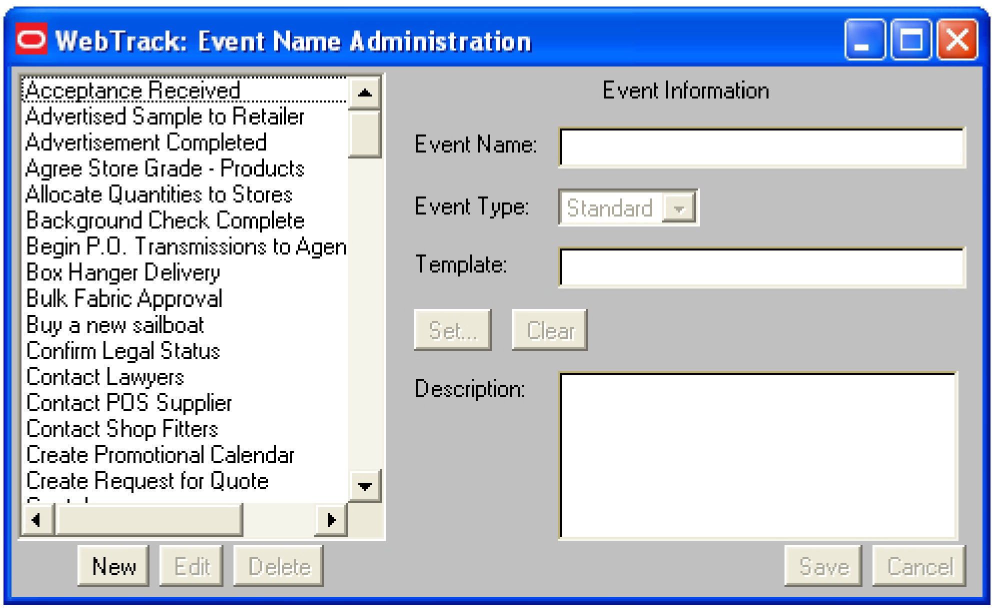
Track events are activities or steps that occur in the process of completing a project or order. When you create a track, you can add these events. You can create track templates using these events for tracks that are regularly used. When you create a parent event, you must associate a template to it. The template contains nested events that have been previously created.

With WebTrack, events are the specific tasks that you monitor for completion in a track. Events that are commonly used together may be grouped into a template, which is used to create a track. In this section, you name events. If an event is defined as a parent event to a nested track, that relationship will be defined when you add or edit an event. An event is a parent event when its completion is dependent on completion of events in a nested track.

When you create a nested event, you cannot associate it to a template. It is lowest level of track events.

Create nested events	Associate nested events to a template	Create a parent event	Associate Parent Event to Template	When Parent Event 1 occurs on a track, the events associated with Template 1 are acted upon.
Event 1 Event 2 Event 3	Template 1: contains Event 1, Event 2, and Event 3	Parent Event 1	Parent Event 1 => Template 1	

Navigate: On the Administration Console, click **Events**. The WebTrack Event Name Administration window opens.



WebTrack Event Name Administration window

Add an event

1. On the Event Name Administration window, click **New**.
2. In the Event Name field, enter the name of the event.
3. In the Event Type field, select the type of event from the drop-down list:
   - Standard - These events have to be completed; they cannot be deleted once a track has been published.
   - Optional - Once the track has been published, optional events can be deleted from the track.
4. In the Description field, enter a description of the event.
5. Click **Save** to store your changes.
6. Click the close window button to return to the Administration Console window.

Add a parent event

1. On the Event Name Administration window, click **New**.
2. In the Event Name field, enter the name of the event.
3. In the Event Type field, select the type of event from the drop-down list:
    - Standard - These events have to be completed; they cannot be deleted once a track has been published.
    - Optional - Once the track has been published, optional events can be deleted from the track.
4. Click **Set**. The Choose Template window opens.
5. Navigate to and select a template
6. Click **OK**.
7. In the Description field, enter a description of the event.
8. Click **Save** to store your changes.
9. Click the close window button to return to the Administration Console window.

Edit an event

1. On the Event Name Administration window, select the event you want to change. Edit and Delete are enabled.
2. Click **Edit**.
3. Change the enabled fields as necessary
4. Click **Save** to store your changes.
5. Click the close window button to return to the Administration Console window.

Delete an event

Note: Events cannot be deleted if they are part of a live track at either the parent or nested level.

1. On the Event Name Administration window, select the event you want to remove.
2. Click **Delete**. You are prompted to confirm your decision.
3. Click **OK** to confirm the deletion. The event is deleted from the list.
4. Click the close window button to return to the Administration Console window.

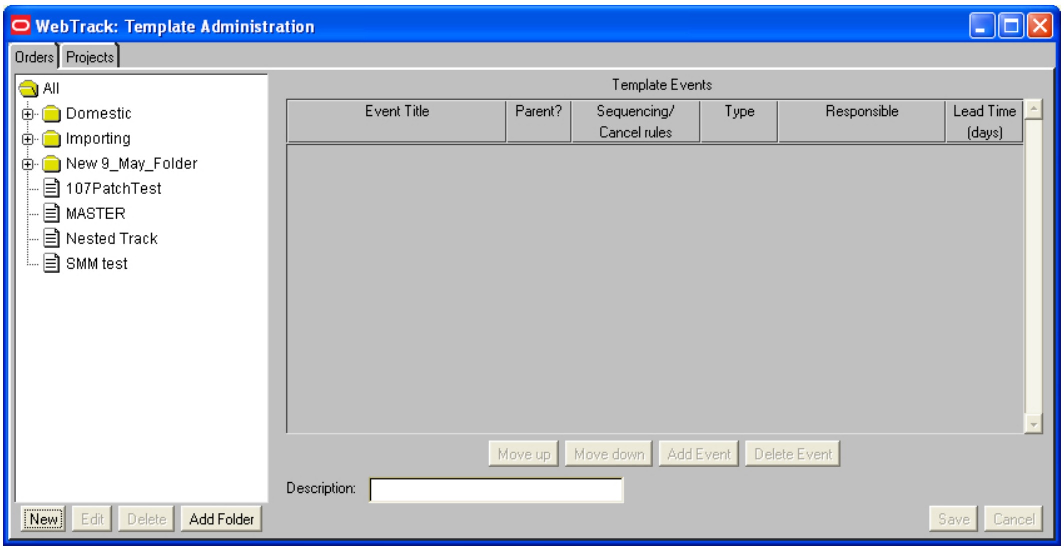
Set Up the Template Folder Frame

In WebTrack, track templates can be stored in folders. Within a folder, there might be a parent template and nested templates. You can plan to have the folder frame display a visual representation of the association of templates.

The first template name is appended with a letter P to indicate a parent track, the second template is appended with a letter c for a nested track. You design and standardize a naming convention that works for your enterprise.

To view the templates in a folder, click on the plus or minus (+/-) icon to the left of the folder you want to open. Click on the template icon to open the template. Template events are displayed when a template is selected.

Navigate: On the Administration Console, click **Templates**. The WebTrack Template Administration window opens.



WebTrack Template Administration window

Add a folder

1. Click on the Projects or Orders tab as necessary. The folder will be stored in the tab you choose.
2. In the folder frame, click **Add Folder**. The New Folder dialog box opens.
3. In the Folder Name field, enter a name for the new folder.
4. Click **OK** to save your changes. The new folder in the folder frame.
5. Click the **+** button to the left of the folder icon in the directory to open the folder.

> **Note:** A folder can be stored within a primary folder, and templates are stored within any folder. If you wish to place a folder within another folder, open the primary folder before following the steps in this procedure. It is possible to reposition a folder once it is created by copying and pasting it.

Copy a folder or a template

1. Select the folder or template icon that you want to copy.
2. Right-click on the icon, and select Copy.
3. Select one of the following:
    a. To place the copy in a different folder, right-click on the destination folder and select Paste. The template name remains the same as the original template.
    b. To place the copy in the same folder as its source folder, right-click in that location. A second template icon , but the name is appended with the characters (2).

> **Note:** If you want to delete the source template, re-select that icon and click **Delete**. To rename the copy, see the Edit a template procedure.

Move a folder or a template

1. Select the folder or template icon.
2. Drag the icon to the new folder location. The folder or template icon in the new location.
   Select the folder or template icon.

Delete an empty folder

1. In the list on the left side of the Template Administration window, select the folder that you want to delete.

> **Note:** You cannot delete a folder that contains any templates. Delete or move the templates before deleting the folder.

2. Click **Delete**. The folder is deleted from the list.

Delete a template

1. Click on the template icon that you want to delete.
2. Click **Delete**. A Confirm Delete dialog box opens. Click **OK** to confirm your action or Cancel to keep the template.

> **Note:** Refer to the Set up or Edit templates section for field and button descriptions.

Define Track Templates

With WebTrack, a template provides a list of individual events, in a particular order that would be standard for a track. When a user creates a track, a template can be used as a guideline.

When you create a template, consider a process you follow to fill a purchase order or to complete a project. Each step in a process is called an event. Events must be created before you can create a template.

WebTrack provides added scheduling power by providing a way to track other events that must occur before the event can be completed. This can be achieved in two ways:

- Use the sequencing rules to define the order in which events need to be completed in a standard single level template/track.
- Create parent events where the events in the nested template/track need to be completed before the parent event can be completed.

In addition, WebTrack provides the ability to define logic that will automatically cancel events based on the completion or cancellation of other events within the template.

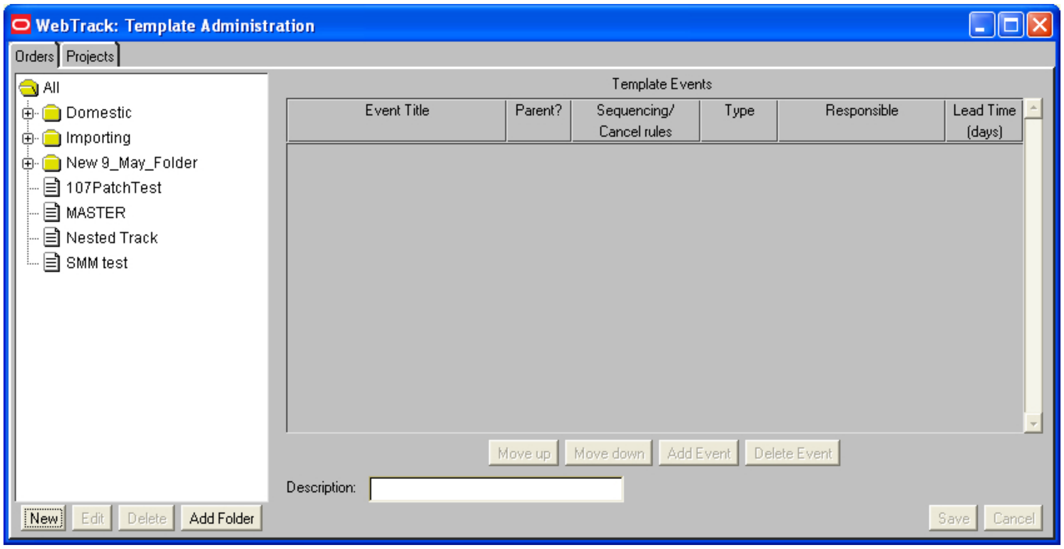
Before creating a template, you should plan the end-to-end critical path.

Plan the end to end critical path

> **Note:** Since templates and events are interdependent, it is important to follow this development process. The following process flow summarizes the activities required in template creation.

1. Map out the entire critical path. Include all nested activities.
2. Determine the number of nested tracks required, if any.
3. Create events.
4. Create the nested templates.
   a. Create the first nested template. Schedule the last event to complete on Day 0.
   b. Create the second nested template. Schedule the last event to complete on Day 0.
5. Create the parent event. An event is not a parent event until the nested template is attached.
6. Create the master template. Follow the Create a Template procedure.
   a. Include parent events.
   b. Set simple or multiple dependencies.
   c. Assign the track owner.
   d. Determine lead times (days before an alert).

Navigate: On the Administration Console, click **Templates**. The WebTrack Template Administration window opens.



WebTrack Template Administration window

Create a template

Note: Before you create a template, all events must exist.

1. Select the type of track you are creating
   a. To create an order track template, select the Order tab
   b. To create a project track template, select the Projects tab
2. On the folder frame of the Template Administration window, select the folder where the new template will reside.
3. Click **New**. The Enter Name window opens.
4. In the Template name field, enter a template name.
5. Click **OK**. The name in the description field.
6. Click **Add Event**. An additional step in the template is added.
7. Double-click in the Event Title field.
8. Select the event name from the drop-down list.
9. Add as many events as necessary for your track.
10. To change the order of the events, select an event:
    - Click **Move up** to move the event higher in the order of events.
    - Click **Move down** to move the event lower in the order of events.

11. To set the sequence of events and cancellation rules,
    - Select an event, then double click in the event's Sequencing/Cancel Rules field. The Edit Dependencies window opens.
    a. Select the Dependencies tab to set the sequence of events and choose one of the following radio buttons:
       - Simple Dependencies. In the Options field, select one of the following:
       - Any time: This event can be completed anytime in the life span of the track. This is the default option for the first event on the template.
       - After previous: This event can be marked complete only when the previous event is complete.
       - After all previous: This event can be marked complete only when all previous events are complete.
       - Complex Dependencies
       - In the Dependencies area, select the events that must be completed before this event can occur.
    b. To set rules for automatically canceling this event based on the cancellation or completion of other events within the track, select the AutoCancellation tab:
       - From the list of other events in the track, select one or more that must be completed or cancelled before this event is to be cancelled.

         Note: Only events that do not have dependencies or are not dependent on the selected event will appear within the list of events that can be used to define the cancellation rules.

       - If you chose only one of the other events, the event being maintained will cancel upon completion or cancellation of the selected event. If you chose more than one of the other events, chose one of the following options:
       - Cancel When All Complete: This event being maintained will be cancelled upon the cancellation or completion of all of the other events you selected.
       - Cancel When Any Complete: This event being maintained will be cancelled upon the cancellation or completion of any of the other events you selected.
    c. Click **OK** to save your Sequencing/Cancel Rule settings or **Cancel** to abandon them. The Edit Dependencies window closes, and you return to the WebTrack Template Administration window.

       Note: If sequencing has been set, this will be denoted within the sequencing / cancel rules column by including the simple dependency, the event name of the dependency, or identify that multiple events were assigned. If cancellation rules were define, these will be denoted within the sequencing / cancel rules column by making the dependency appear in red, bold text.

12. Select the type of event. A standard event must be included in the track; an optional event can be omitted.
13. To change the enterprise responsible for the event, double click in the event's Responsible field, then select the responsible enterprise.
14. To change the lead time for the event, double click in the event's Lead Time field, then enter the number of days needed for lead time to complete the event. Lead-time values must be in sequence from longest lead-time at the top of the list to 0 days for the last event.
15. Click **Save** to store your changes.
16. Click the close window button to return to the Administration Console window.

Edit track templates

1. Select the template name in the folder panel. The template events are displayed.
2. Click **Edit**. Any field that can be edited in an alternate color.
3. Double-click to edit a field as necessary.
4. Click **Save** to store your changes.
5. Click the close window button to return to the Administration Console window.

Delete a track template

1. Select the template you want to delete.
2. Click **Delete.** A dialog box that asks you to confirm your decision.
3. Click **OK** to confirm your decision. The template is permanently deleted from the list and the database.

> **Note:** If the template is currently assigned as a dependent or nested template, WebTrack does not allow you to delete the template.

4. Click the close window button to return to the Administration Console window.

Delete a template event

> **Note:** Events that have not been marked complete cannot be erased.

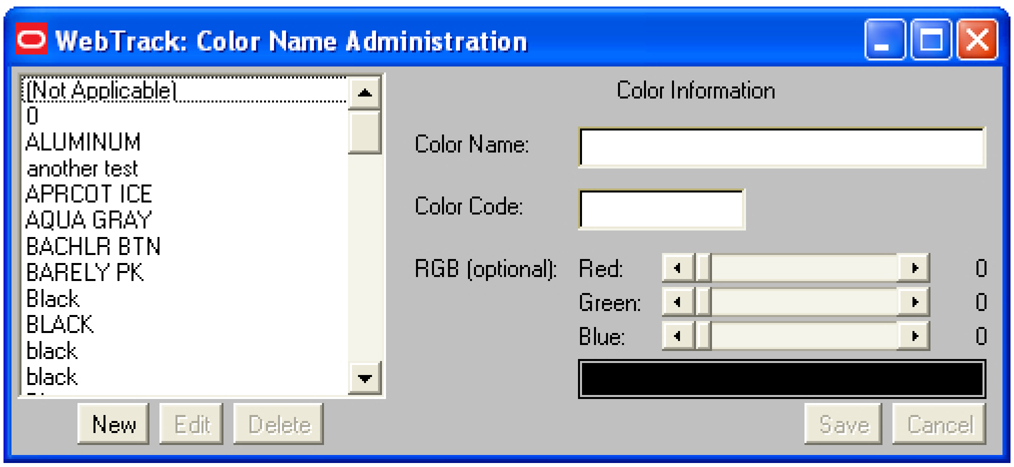
1. Select the appropriate template and click **Edit.**
2. Select the event you want to delete.
3. Click **Delete Event**.
4. Click **Save** to store your changes.
5. Click the close window button to return to the Administration Console window.

Define Product Colors

With WebTrack, you can store standard information regarding product colors. These colors are then available when adding products to the system. A separate track can also be created for each product and color combination on an order, when generating tracks. When you generate reports, you can sort and filter tracks by product color.

> **Note:** When a user creates a product in WebTrack, they must assign at least one color. If your enterprise does not assign colors to your products, users may select [Non applicable] as the default color option.

Navigate: On the Administration Console, click **Colors**. The WebTrack Color Name Administration window opens.



WebTrack Color Name Administration window

Add a color

1. On the WebTrack Color Name Administration window, click **New**.
2. In the Color Name field, enter a name for the new product color.
3. In the Color Code field, enter a unique number for the new product color.
4. In the RGB (Optional) field, create the new product color.
   - Click the right and left Arrow buttons for each color
   - With the mouse, move the sliders for each color
5. Click **Save** to save the changes.
6. Click the close window button to return to the Administration Console window.

Edit a color

1. On the WebTrack Color Name Administration window, select the name of the color you want to change.
2. Click **Edit**.
3. Edit the enabled fields as necessary.
4. Click **Save** to save the changes.
5. Click the close window button to return to the Administration Console window.

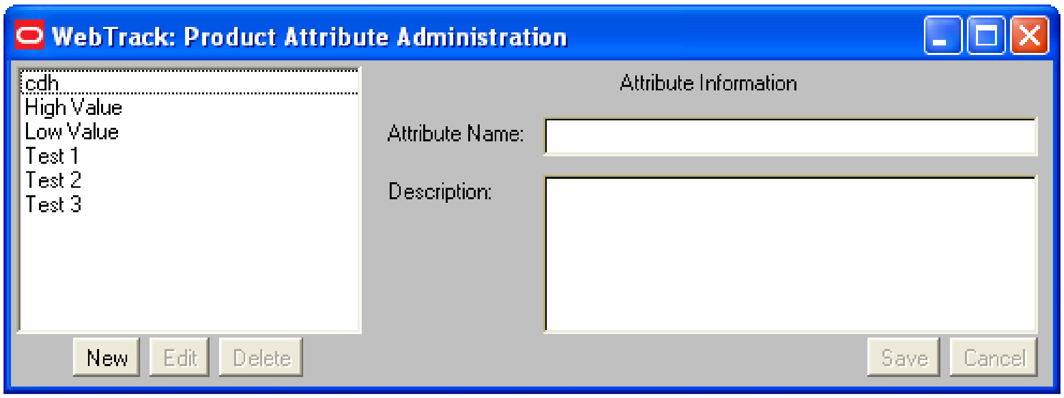
Delete a color

1. On the WebTrack Color Name Administration window, select the name of the color you want to delete.
2. Click **Delete**. A dialog box to confirm your decision.
3. Click **OK**. The color is deleted from the list.
4. Click the close window button to return to the Administration Console window.

Define Product Attributes

With WebTrack, you can store standard information regarding product descriptions or categories. Attributes are then associated with product. When you generate reports, you can sort and filter tracks by product attributes.

Navigate: On the Administration Console, click **Attributes**. The WebTrack Product Attributes Administration window opens.



WebTrack Product Attributes Administration window

Add attributes

1. Click **New**.
2. In the Attributes Name field, enter the new attribute name.
3. In the Description field, enter a description of the new attribute.
4. Click **Save** to save the changes.
5. Click the close window button to return to the Administration Console window.

Edit attributes

1. Highlight the attribute you want to edit.
2. Click **Edit**.
3. Edit the enabled fields as necessary.
4. Click **Save** to save the changes.
5. Click the close window button to return to the Administration Console window.

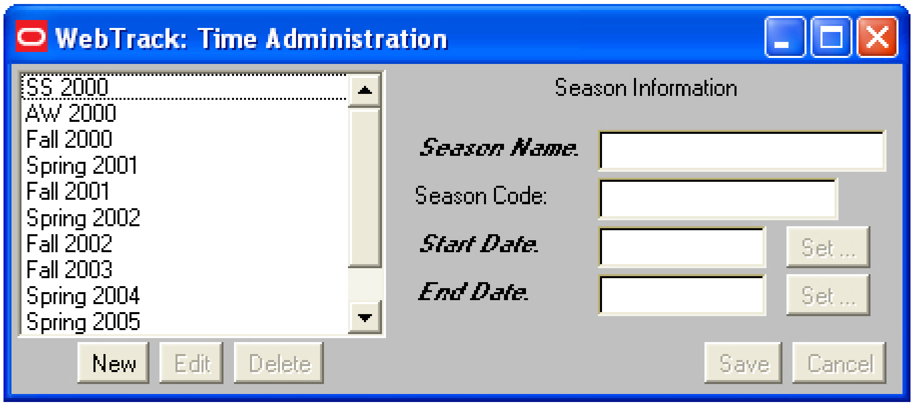
Delete attributes

1. Highlight the attribute you want to delete.
2. Click **Delete**. A dialog box to confirm your decision.
3. Click **OK**. The attribute is deleted from the list.
4. Click the close window button to return to the Administration Console window.

Define Seasons

With WebTrack, a season is a period of time that you define with a name, a code, and a start and end date. When you create a track, you select a defined season. When you generate reports, you can sort and filter tracks by season.

Navigate: On the Administration Console, click **Seasons**. The WebTrack Time Administration window opens.



WebTrack Time Administration window

Add a season

1. On the WebTrack Time Administration window, click **New**.
2. In the Season Name field, enter the name of the new season.
3. In the Season Code field, enter the code.
4. Click **Set …** to the right of the Start Date field. The Set Date window opens.
   a. Click **<** and **>** as necessary to select the year in which the new season starts.

      Note: << and >> move the date 5 years ahead or behind.

   b. Select the month in which the new season starts. The calendar of dates for the month opens.
   c. Select the date on which the new season starts.
   d. Click **OK**. The selected start date in the Start Date field.
5. Click **Set …** to the right of the End Date field. The Set Date window opens.
   a. Click **<** and **>** as necessary to select the year in which the new season ends.

      Note: << and >> move the date 5 years ahead or behind.

   b. Select the month in which the new season ends. The calendar of dates for the month opens.
   c. Select the date on which the new season ends.
   d. Click **OK.** The selected end date in the End Date field.
6. Click **Save** to save the changes.
7. Click the close window  button to return to the Administration Console window.

Edit a season

1. On the WebTrack Time Administration window, highlight the season you want to edit and click **Edit**.
2. Edit the enabled fields as necessary.
3. Click **Set …** to make any necessary changes to the start and end dates.
4. Click **Save** to save the changes.
5. Click the close window button to return to the Administration Console window.

Delete a season

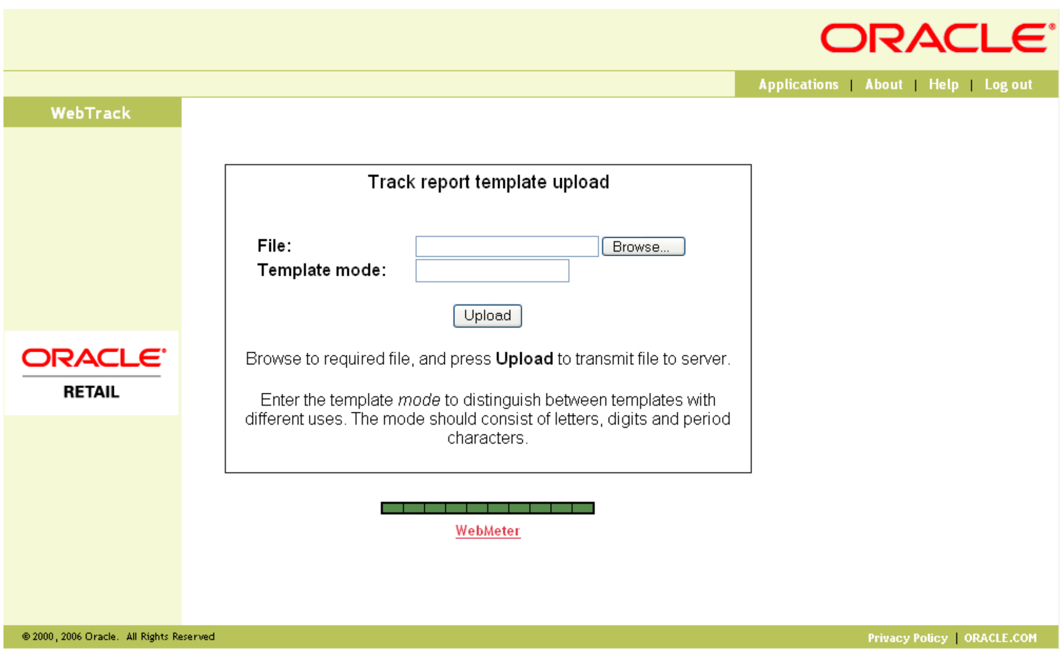
1. On the WebTrack Time Administration window, select the season you want to delete.
2. Click **Delete**. A dialog box to confirm your decision.
3. Click **OK**. The season is deleted from the list.
4. Click the close window button to return to the Administration Console window.

Upload a Track Report Template

You have the ability to add XSL Formatting Objects markup language (XFO) print templates to WebTrack. See the Configuration Guide for complete information on XFO syntax and templates.

Upload a track report template to the server

Navigate: On the Administration Console change the path to http://www.retail.com/applications/tracks/template.jsp. The Track report template upload window opens.



Track Report Template Upload window

1. Click **Browse**.
2. Navigate to the XFO template you wish to upload.
3. Click **Open**.
4. Enter a mode in the Template mode field.
5. Click **Upload**. The template is uploaded to the server.
6. Set up track report printing. See Define system option in the Customize WebTrack section.

Customize Webtrack

Define System Generated Email Messages

WebTrack Mail allows you to determine how the system generates email notifications to all individuals involved in your tracks. To avoid email floods during high activity periods, WebTrack can be configured to batch email daily.

> **Note:** The administrator email address is defined using the options control. The event items are available only when the email message has an associated event (for example, event complete).

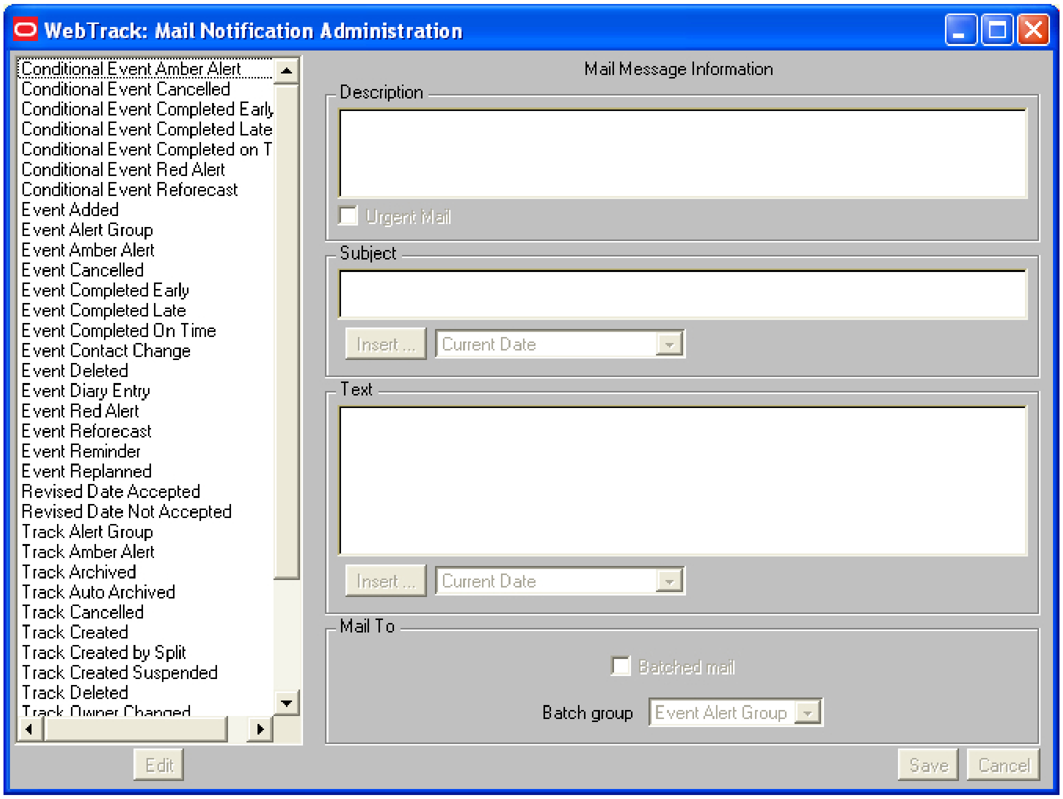
WebTrack sends emails to users to:

- Highlight exceptions
- Alert them of new events
- Inform them when events are complete
- Inform them of a diary entry

For each mail type, you can specify

- Whether the email is sent or not
- When to send the email
- To whom the email is addressed
- The content of the email message
- Links within diary entry emails to the specific track

Navigate: On the Administration Console, click **Mail.** The WebTrack Mail Notification Administration window opens.



WebTrack Mail Notification Administration window

Edit an email message settings

1. Select the event you want to edit.
2. Click **Edit**.
3. Select the Urgent Mail check box to indicate that the message is critical. Clear the Urgent Mail check box to indicate that the message is not critical.
4. To edit the subject line of the email, in the Subject area:
    a. Enter text that is relevant to the item inserted.
    b. Select the desired criteria from the drop-down lists.
    c. Click **Insert**.

    Example: ${evowner} at ${pathorg}: ${path}: "${event}" date not accepted

5. To edit the text of the email, in the Text area:
    a. Enter text that is relevant to the item inserted.
    b. Select the desired criteria from the drop-down lists.
    c. Click **Insert**.

    Example: ${owner} at ${pathorg} has not accepted your revised date for the event ${event} in the ${ts_path} ${path}.

6. In the Mail To area:
   a. For each user listed, select how the email is sent to them, To, Cc, Bcc, or none.
   b. Select the Batched Mail check box, and select the batch group from the Batch Group drop-down list.

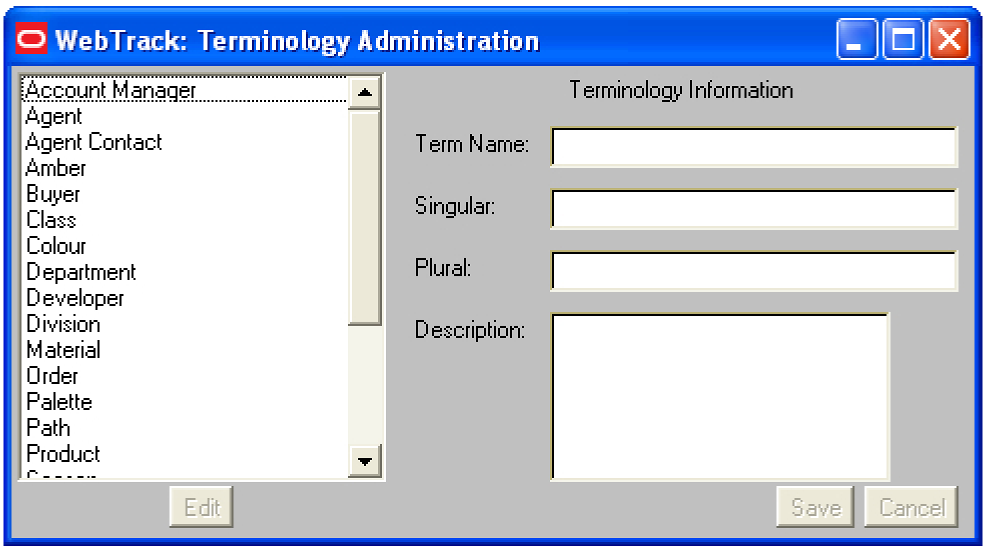
   Note: By selecting the Batch Mail check box, you indicate that all emails are held until batch is run.

7. Click **Save** to store your changes.

Define Terminology

You can customize some descriptive terminology, substituting the terms that are most familiar to your Enterprise for those to which WebTrack defaults. The administrator can redefine a term name with both singular and plural definitions, followed by a description of the term and any changes made to it. Once a term is changed, all references to the original term throughout the product will display the customized term.

Navigate: On the Administration Console, click **Terms**. The WebTrack Terminology Administration window opens.



WebTrack Terminology Administration window

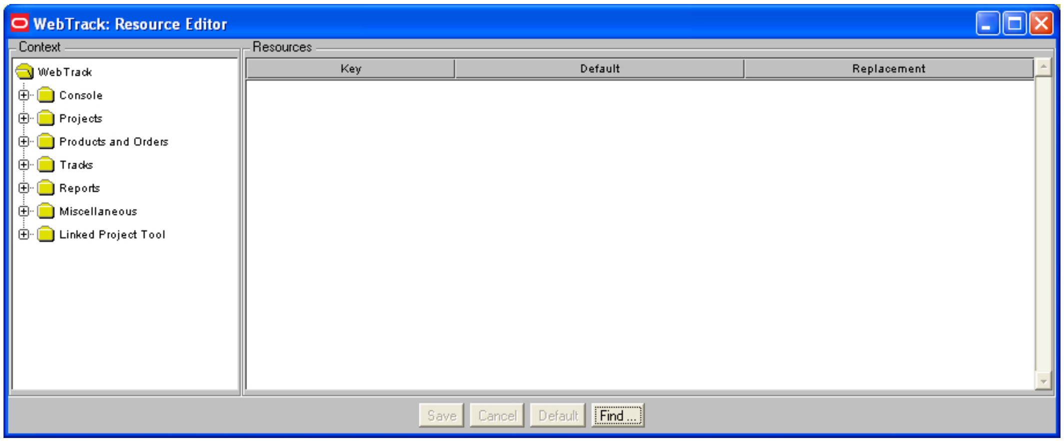
Maintain terms

1. On the WebTrack Terminology Administration window, select the term you want to change and click **Edit**.
2. In the Singular field, enter the term in the single tense.
3. In the Plural field, enter the term in the plural tense.
4. Click **Save** to save the changes.
5. Click the close window  button to return to the Administration Console window.

Configure Resources

With WebTrack, a resource is a field that allows you to store, manipulate data, and customize a key field name.

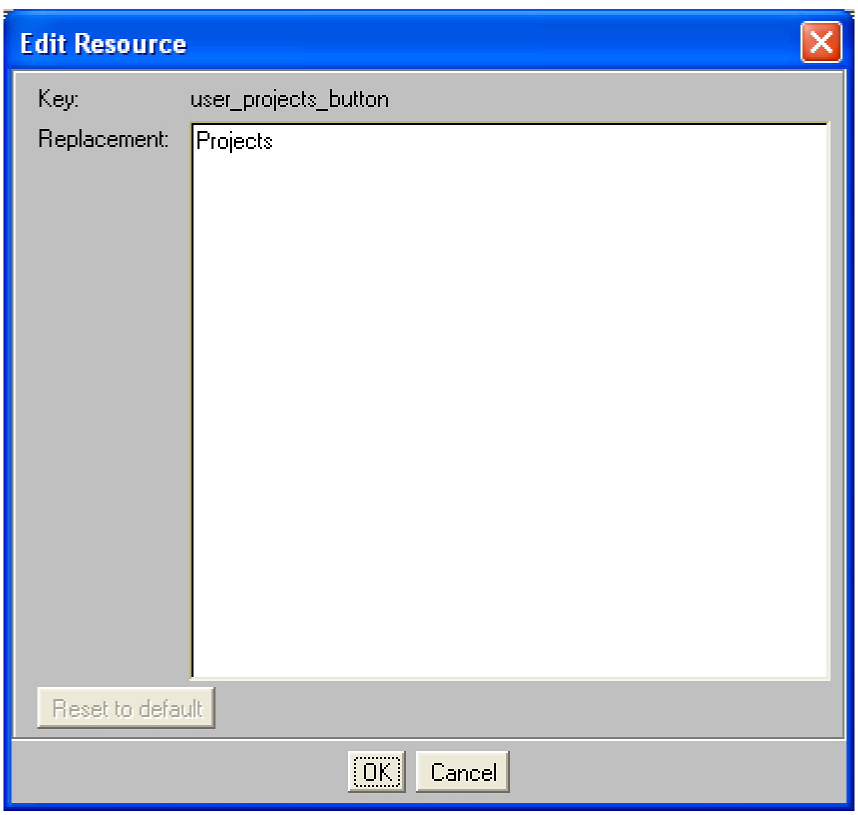
Navigate: On the Administration Console, click **Resources**. The WebTrack Resource Editor window opens.



WebTrack Resource Editor window

Change a resource name

1. In the WebTrack Resource Editor window, double-click on the name of a resource in the Key column. The Edit Resource window opens.



Edit Resource window

2. In the Replacement field, enter the new field name.

> **Note:** All replacements must be in the same format as the key.

3. Click **OK** to accept the new name or click Reset to Default to discard the change. If you click **OK**, the Resources editor window with the replacement name displayed in the replacement column. The key name in italics.
4. If needed, continue entering new field names, or click **Save** to make the name changes permanent.

Reset all default key names

1. Click **Reset** to Default to restore the default key names for all fields.
2. Click **Save**. All key names will be restored.

Reset to a single key name

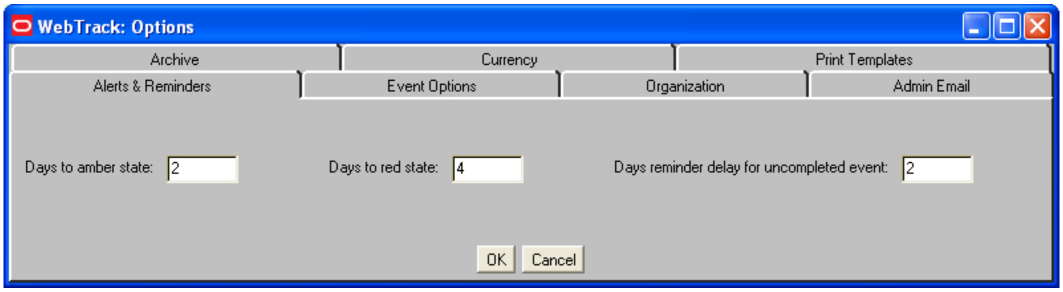
1. Double-click on the key name. The Edit Resources window opens.
2. Click **Reset** to Default.
3. Click **Save**, in the Resource Editor window.

Define System Options

WebTrack initially establishes default system-wide settings. To suit your Enterprise better, you can modify these settings on the WebTrack Options window. Your changes apply to all users and tracks within your Enterprise. The following areas can be modified:

- Alerts - Allows you to define the number of days past due before an event is enters an alert state.
- Event Options - Allows you to define system wide permissions for all users.
- Organization - Allows you to maintain the name of your organization.
- Admin Email - Allows you to maintain your system administrator's email address.
- Archive - Allows you to define number of days after the completion of a track that it remains in the system before it is archived.
- Reminders - Allows you to define the number of day after a event is supposed to be completed before a reminder email is sent.
- Currency - Allows you to define the currency used in the system.

Navigate: On the Administration Console, click **Options**. The WebTrack Options window opens.



WebTrack Options window

Set days before alerts

1. On the WebTrack Options window, click the **Alert tab**.
2. In the Days to yellow state field, enter the number of days before the event completion date should go to the yellow state of alert.
3. In the Days to red state field, enter the number of days before the event completion date should go to the red state of alert.
4. Click **OK** to save any changes and close the WebTrack Options window.

Enable or disable event options

1. On the WebTrack Options window, click the **Event Options tab**. The WebTrack Event Options window opens.
   - To enable a particular event function, select the appropriate check box.
   - To disable a particular event function, clear the appropriate check box.
2. Click **OK** to save any changes and close the WebTrack Options window.

Change organization name for email

1. On the WebTrack Options window, click the **Organization tab**. The Organization Tab window opens.
2. In the Organization Name for E-mail field, enter the name of your organization as you wish it to appear in outgoing e-mail messages.
3. Click **OK** to save all changes and close the WebTrack Options window.

Set system administrator email

1. On the WebTrack Options window, click the **Admin Email** tab.
2. In the Administrator E-mail field, enter the e-mail address of your system administrator as you wish it to appear in outgoing e-mail messages.
3. Click **OK** to save all changes and close the WebTrack Options window.

Set number of days until archive

1. On the WebTrack Options window, click the **Archive tab**.
2. In the Days After Completion of Track to Auto Archive field, enter the number of days a completed track should remain active before being archived.

   Note: Archived tracks can be viewed for historical purposes within Reports and on the Archived Tracks tab on the WebTrack Tracks window.

3. Click **OK** to save all changes and close the WebTrack Options window.

Set delay for reminders

1. In the WebTrack Options window, click the **Reminders tab**.
2. In the Days Reminder Delay for Uncompleted Event field, enter the number of days the system should wait before sending the owner an email alert regarding an incomplete event.
3. Click **OK** to save all changes and close the WebTrack Options window.

Specify displayed currency

1. On the WebTrack Options window, click the **Currency tab**.
2. In the Displayed Currency Symbol field, enter the currency symbol, as it should be displayed for your Enterprise.
3. Click **OK** to save all changes and close the WebTrack Options window.

Set up track report printing

1. Upload a track report template. See Upload a track report template in the Product and track administration section.
2. On the WebTrack Options window, click the **Print Templates tab**.
3. Enter strings that define the track report template. See the format and examples below.
   [track name]/[mode], prop.a, prop.b, max=x, sel=[list, all, or either]
   For example:
   Track Summary/tracksumm,prop.type=summ,sel=all
   Track Detail/tracksumm,prop.type=detail,sel=either
   Track Diary (text mode)/diary,prop.format=text,max=1000,prop.diary=1
   Track Diary (list mode)/diary,prop.format=list,max=1000,prop.diary=1

   Note: See the Configuration Guide for complete information on XFO syntax.

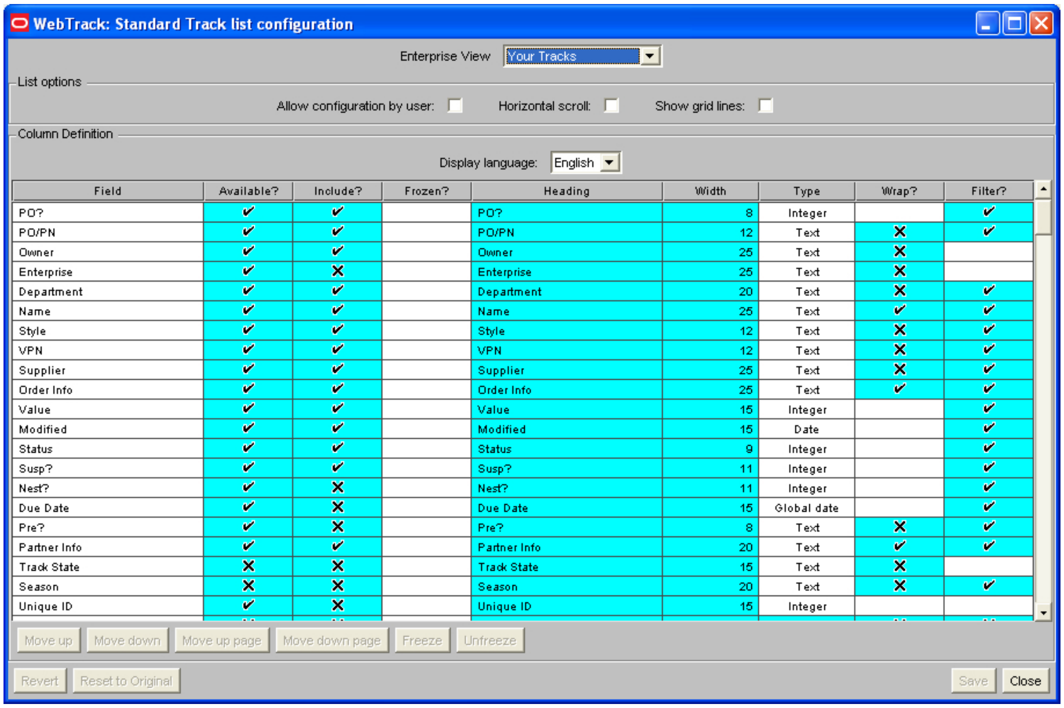
4. Click **OK** to save all changes and close the WebTrack Options window.

Configure Track Lists

With WebTrack, administrators design the way a track list opens. In the Track List Configuration window, you choose to show or hide specific fields, attributes and the column order. As administrator, you also give the user permission to configure several field attributes of the display. Complete the procedure in this section independently for Your Tracks, Other Tracks, or Linked Project Track List lists.

Note: If the user logs in to standard WebTrack, they will see the lists configured as they appear within their enterprise's Your Tracks and Other Tracks list configuration. The Linked Project Track List view supports the WebTrack track selection list screen that appears when a user navigates to WebTrack directly from Oracle Retail Design. The default configuration of this view will be defined by the Oracle Retail Design enterprise's Linked Project Track List settings. Therefore, if you are an agent logging in to a retailer's enterprise within Oracle Retail Design and navigating to Oracle Retail WebTrack, the track list screen default configuration will be set based on the retailer's rules for the Linked Project Track List.

Navigate: On the Administration Console, click **Lists.** The Standard Track List Configuration window opens. The second column is a list of fields. These fields when selected become the column in a track list. The field characteristics that are shaded can be configured. The top field listed will be the first column on the left of a tracks list window; the last field listed will be the last column on the right.



Standard Track List Configuration Window

Configure list fields and attributes

1. In the Enterprise View drop-down list, select Your Tracks, Other Tracks, or Linked Project Track List as desired. The choice allows you to modify the list display for one group at a time.
2. Select the Allow configuration by user check box if you want to give users the ability to choose the tracks configuration to be displayed.
3. Select the Horizontal scroll check box if you want users to be able to scroll beyond the normally visible screen width.
4. Select the Show gridlines check box if you want gridlines to be displayed on the list display screen.
5. In the Display Language selection field, select the language.
6. Identify the fields that are available to be included in the track list. If a check mark in the Available? column next to the field name, you can use the following steps to configure the field and its characteristics.

7. Complete your display configuration by selecting the line for the field you want to configure. With the field highlighted, double-click in any shaded cell in that line. The Edit Field window is displayed. Complete the following steps to configure the field.
   a. To change the display language for this field only, select a language from the Language field drop-down list.

      Note: English is the only language currently supported by Oracle Retail.

   b. To rename the field, enter the new name. Leave the Heading field blank to use the name displayed in the Default heading field.
   c. To make a field available to the user's Track list, select the Available check box.
   d. To hide a field (make it unavailable), double-click in the **Include?** check box to select it. By default, all fields listed are available and preselected to be displayed in the track list.
   e. To change the field width, click in the Width field and enter a new number.
   f. To allow word wrapping in the selected field, select the Wrap check box.
   g. To allow a user to Filter their Track list display by this field, select the Filter check box.
8. Click **OK** to save the entries in the Edit Field window. If you wish to cancel your selections, click **Cancel**.

Edit list column order

Edit the column sequence in a track list in the Standard Track configuration window.

1. Select a field, then use the **Move Up** or **Move Down** buttons to place the fields in a specific order.
2. Select the top heading, then click Freeze. This freezes the first column on the left hand side of the user's list screen. All other columns to the right scroll.
3. Click **Unfreeze** to allow all columns to scroll.

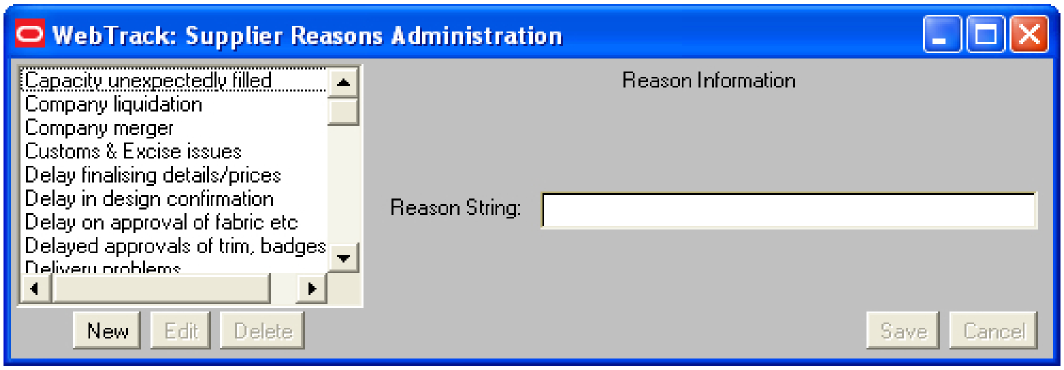
   Note: To freeze more than one column, highlight one column and hold down the shift key.

4. Click **Revert** only if you wish to discard any changes you have made to the track list column order since the last time you clicked Save.
5. Click **Reset** to Default only if you want to reestablish the default column order and discard any changes you made.
6. Click **Save** to store your entries, or click **Cancel**. The window closes and the administration console opens. The changes you requested have been implemented. When you click **Lists** again, you will see the changes implemented.

Define Reason Codes

With WebTrack, supplier account managers can report a delay for an event, select a reason from a drop-down list, and run database searches for standard causes. When an assigned event is late, event owners use reason information contained on the Reasons Administration window in the WebTrack Diary.

Navigate: On the Administration Console, click **Reasons**. The WebTrack Supplier Reasons Administration window opens.



Supplier Reasons Administration window

Add reasons

1. On the Supplier Reasons Administration window, click **New**. The Reason String field is enabled.
2. In the Reason String field, enter the reason for the supplier delay. The field can contain a maximum of 255 characters.
3. Click **Save** to save the changes.
4. Click the close window button to return to the Administration Console window.

Edit reasons

1. On the Supplier Reasons Administration window, select the reason in the list that you want to change.
2. Click **Edit**.
3. Make necessary changes to the string.
4. Click **Save** to save the changes.
5. Click the close window button to return to the Administration Console window.

Delete reasons

1. On the Supplier Reasons Administration window, select the reason that you want to change.
2. Click **Delete**. A dialog box to confirm your decision.
3. Click **OK**. The reason is deleted from the list.
4. Click the close window button to return to the Administration Console window.

3

WebTrack User Administration

User Adminstration

WebTrack is a planning tool. Project managers use it to outline project events and schedules. Up line managers can use information from WebTrack for long-range planning and analysis. WebTrack can be used as a personal organizer that allows you to send messages to yourself as reminders of due dates and tasks that need to be completed on a timely basis.

For purchasing and delivery of product, trading partners use WebTrack to track the process and events that must occur to complete a purchase order. Due dates, ship dates, and the trading party responsible for an event are all detailed.

WebTrack is a powerful scheduling tool because it allows all parties to view events within a process. If an event is not occurring as planned, alerts are sent to the person or business partner who is responsible for the completion of the event and perhaps to business partners who will be affected by a changed schedule. Ultimately, time and resources are managed and the costs of delays can be minimized.

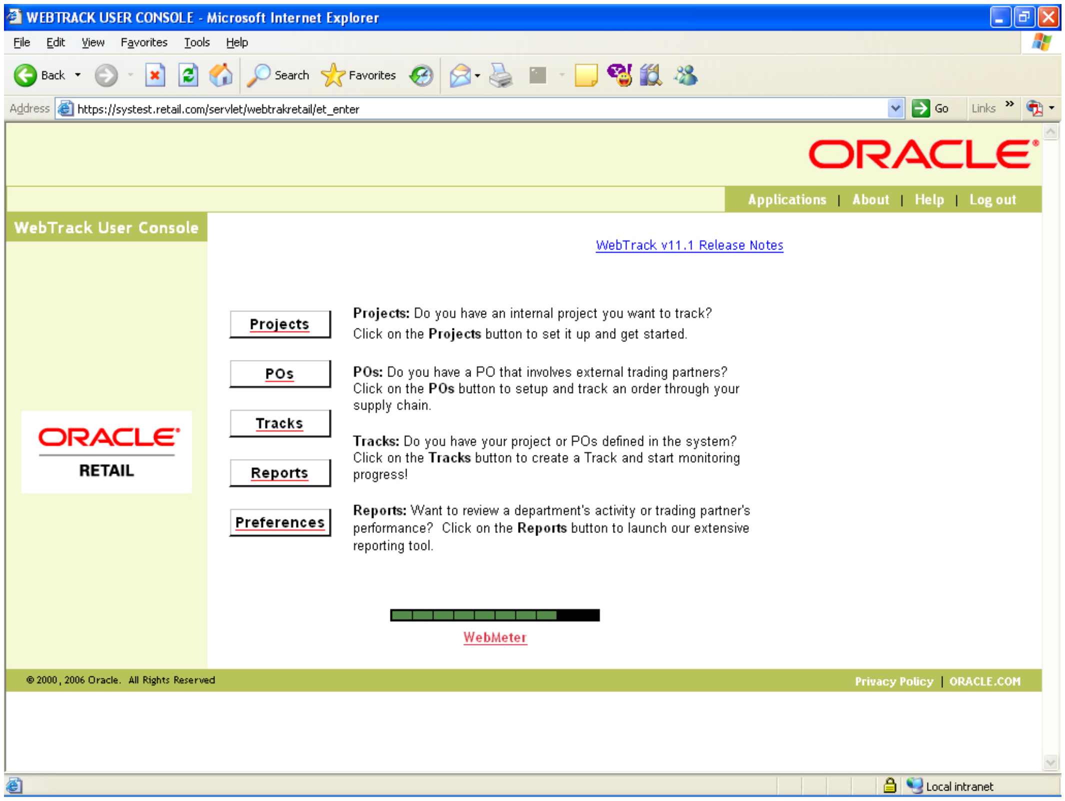
User Workgroups

There are several user workgroups within an organization. Users in the administrative workgroup create and delete tracks; users in the track maintenance workgroup edit tracks, and managers review reports.

The Enterprise administrator who sets up a user profile establishes Workgroup permissions. When you log on to WebTrack, your user ID and password automatically opens your access to specific procedures.

Set Up and Start Webtrack

When you log in to WebTrack, the User Console opens. Start at the top of the User Console and work down in the same order that buttons are listed.



User Console

1. Click **Projects** to set up the project.
2. Click **POs** to set up purchase orders with your trading partners.
3. Click **Tracks** to create and maintain tracks. Use the track to monitor the progress of the order or project through the supply chain.
4. Click **Reports** to launch the search tool. Use the search tool to create reports from data that the WebTrack system monitors, such as order activities of departments or the performance of trading partners.
5. Click **Preferences** to select your preferred font style and size.
   - Add, edit or delete project data
   - Add, edit or delete product data
   - Manage orders
   - View and edit track lists
   - Create tracks
   - Edit track details and events
   - View reports or print reports
   - Set up preferences

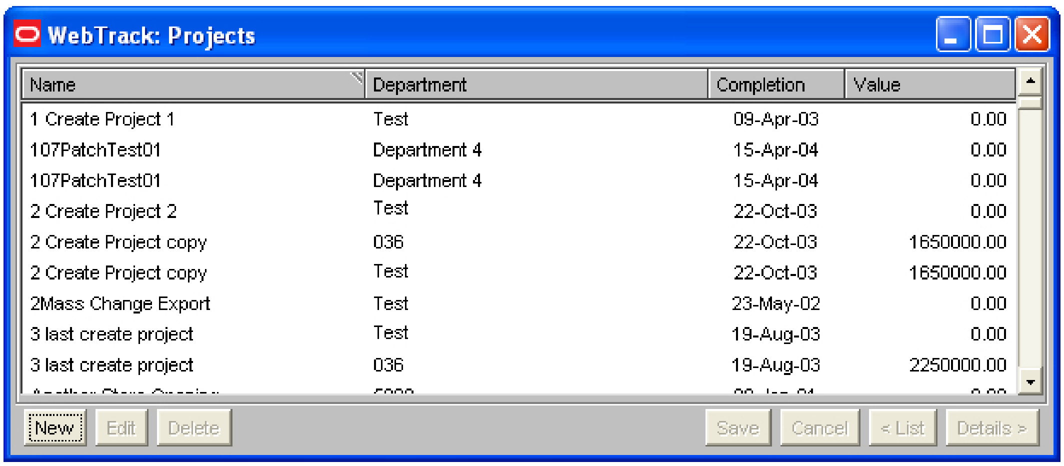
Projects

Maintain Projects

With WebTrack, you can define projects that are internal that you want to track to completion. When you create the track for a project, the project name will be the name of the track. In the projects module you can:

- Set up new projects
- Set up a new supplier for a project
- View information about existing projects
- Change information about existing projects

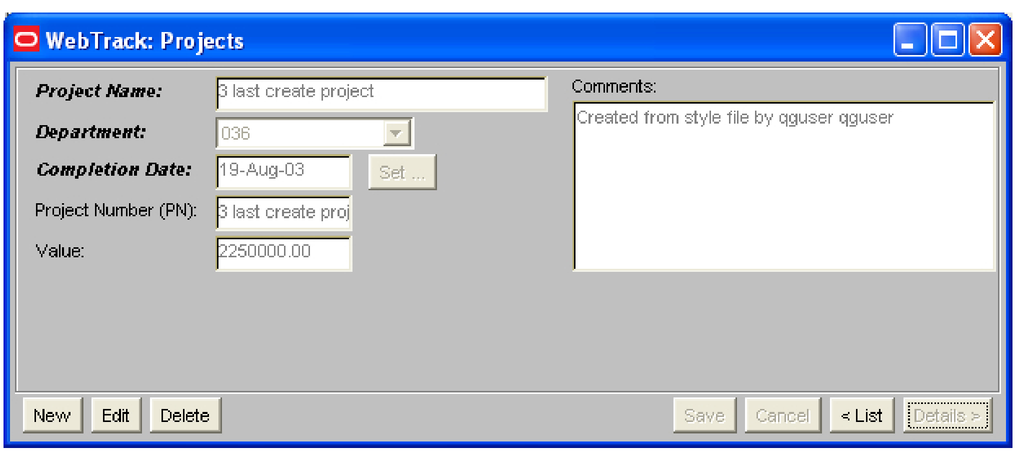
Navigate: On the User Console, click **Projects**. The WebTrack Projects window opens.



WebTrack Projects window

Add a Project

1. On the WebTrack Projects List view window, click **New**. The details view of the Projects window opens. The entry fields are enabled.



Projects Window - Details View

2. Enter the project information. Required fields are:
   - Project Name
   - Department
   - Completion Date

   Note: When there are entries in all required fields, Save is enabled.

3. Click **Save** to save the project.
4. Click the close window button to return to the User Console window.

Edit a Project

1. On the Projects window list view, select the project that you want to change.
2. Click **Edit.**
3. The details view of the Projects window . The entry fields are enabled.
4. Change the project information.
5. Click **Save** to store the information.
6. Click the close window button to return to the User Console window.

Delete a Project

1. On the Projects window list view, select the project that you want to delete.
2. Click **Delete.** A dialog box to confirm your decision opens.
3. Click **OK** to confirm your decision. The project is permanently deleted from the list and the database.
4. Click the close window button to return to the User Console window.

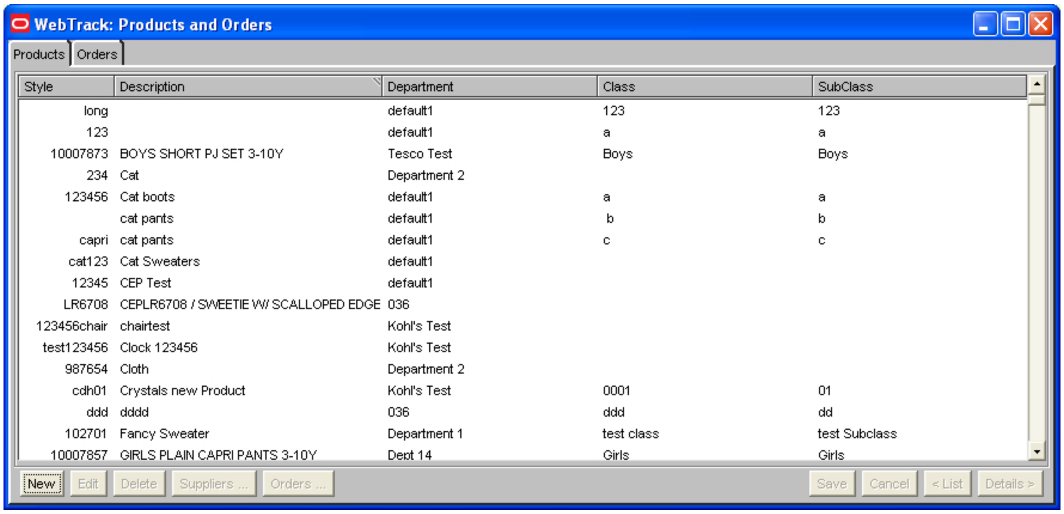
Purchase Orders

Maintain Products

A product is an item that you want to place on a purchase order. Before you can create a purchase order, you must put product information into WebTrack.

Once a product is created, you can specify which suppliers can produce this item so that when you create orders, you can quickly link the correct suppliers.

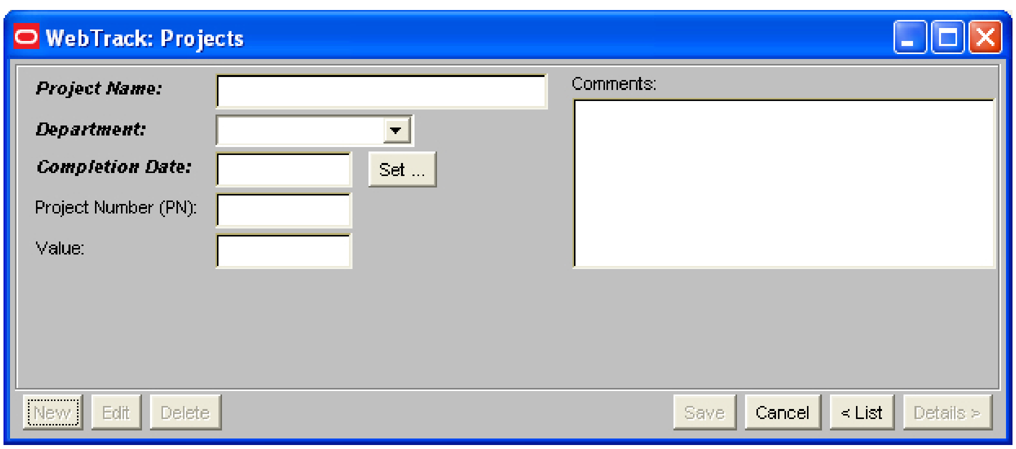
Navigate: On the User Console, click **POs**. The WebTrack Products and Orders window opens.



WebTrack Products and Orders window

Add a Product

1. On the Products tab list view, click **New**. The details view of the Products tab opens.



Products Tab - Details View

2. In the Product Description field, enter the product description. An entry is required. Class or range can describe the product.

> **Note:** The list displays alphanumerically. For example, if you describe a product such as Sweatshirt, Mickey Mouse, all sweatshirts are listed together. However, to list a range together, enter Mickey Mouse, sweatshirt.

3. In the Style # field, enter the style number. A numeric entry is required.
4. In the Vendor Part # field, enter the vendor part number, if any.
5. In the Department field, enter the Department name.
6. In the Class field, enter the name of the class.
7. In the Subclass field, enter the name of the Subclass.
8. In the Retail Price ex Taxes field, enter the retail price before taxes.
9. Click the close window button to return to the User Console window.

Add details to a product

1. On the Colors tab, select at least one color from the Available Colors window and click the > button.

> **Note:**To add colors or attributes to the list, contact the Company Administrator.

2. On the Attributes tab, you can select attributes as search criteria to generate reports. Attributes are optional. To select attributes:
   a. Select a value in the Available Attributes list.
   b. Click the > button. The selected attributes are displayed in the Selected Attributes list.
3. Click **Save** to store your changes.

> **Note:** If the same description was already used in the department, you receive an error message when you click **Save**.

4. Click the close window button to return to the User Console window.

Edit a Product

1. On the Products tab list view, select the product you want to edit.
2. Click **Edit.** The details view of the Products tab opens.
3. Change the information about your product.

> **Note:**To add colors or attributes to the lists, contact the Company Administrator.

4. Click **Save** to save your changes.
5. Click the close window button to return to the User Console window.

Delete a Product

1. On the Products tab list view, select the product you want to delete.
2. Click **Delete**. A dialog box to confirm your decision.
3. Click **OK**. The product is permanently deleted from the list and the database.
4. Click the close window button to return to the User Console window.

Add a Supplier For a Product

1. On the Products tab list view, select the product.
2. Click **Details**. The details view of the Products tab opens.
3. Click **Suppliers**. The Supplier Setup window for the current style opens.
4. Click **New**. The Choose Supplier dialog box opens.
5. In the Supplier field, select a supplier from the list of trading partners in the drop-down list.
6. Click **OK**. The Supplier Setup window opens.
7. In the Account Manager field of the Supplier Setup window, select an account manager from the drop-down list.

   Note: Account Managers are displayed only when the trading partner has correctly entered user information. If no values are displayed, contact and ask your trading partner to enable users as Account Managers. It may also be that when updating your Trading Partner details you have not given them the correct departmental scope.

8. Select the location from the Locations list. The country where the supplier is located in the Country of Origin field. Locations associated with the selected suppliers are displayed in the Locations drop-down list.

   Note: If you use the Locations list, you cannot use the Country of Origin drop-down list. If you do not use the Location list, select the country of origin from the Country of Origin drop-down list.

9. Click **Save** to store your changes. The supplier is added to the product.
10. Click **OK** to return to the WebTrack Products and Orders window.
11. Click the close window button to return to the User Console window.

Edit a Supplier For a Product

1. On the Products tab list view, select the product.
2. Click **Details**. The details view of the Products tab opens.
3. Click **Suppliers**. The Supplier Setup window for the current style opens.
4. Select the supplier you wish to edit and click **Edit**.
5. Edit the information in the Account Manager, Location, and COO fields as necessary.
6. Click **Save** to save your changes. The supplier is changed.
7. Click **OK** to return to the WebTrack Products and Orders window.
8. Click the close window button to return to the User Console window.

Delete a Supplier For a Product

1. On the Products tab list view, select the product.
2. Click **Details**. The details view of the Products tab opens.
3. Click **Suppliers**. The Supplier Setup window for the current style opens.
4. Select the supplier you wish to delete.
5. Click **Delete**. A dialog box to confirm the deletion.
6. Click **OK**. The supplier is deleted from the list.
7. Click **OK** to return to the WebTrack Products and Orders window.
8. Click the close window  button to return to the User Console window.

View Existing Orders For a Product

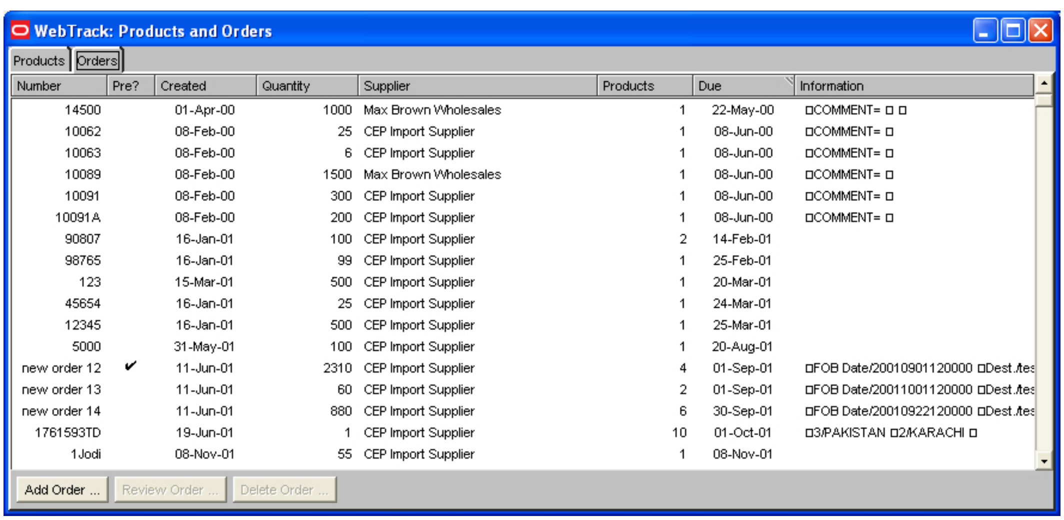
1. On the Products tab list view, select the product.
2. Click **Orders.** All orders for the selected product will be displayed.
3. Click **OK** to close.
4. Click the close window  button to return to the User Console window.

Maintain Purchase Orders

WebTrack allows you to create and edit purchase orders that you later use to create tracks. You must have product information in the system to create a purchase order.

The Orders tab lets you create and review individual orders. The list contains all the orders associated with your Enterprise, including Active and Archived orders. Each order can contain multiple products that are displayed under the Product column.

Navigate: On the User Console, click **POs**. The WebTrack Products and Orders window opens. Click on the **Orders tab**.

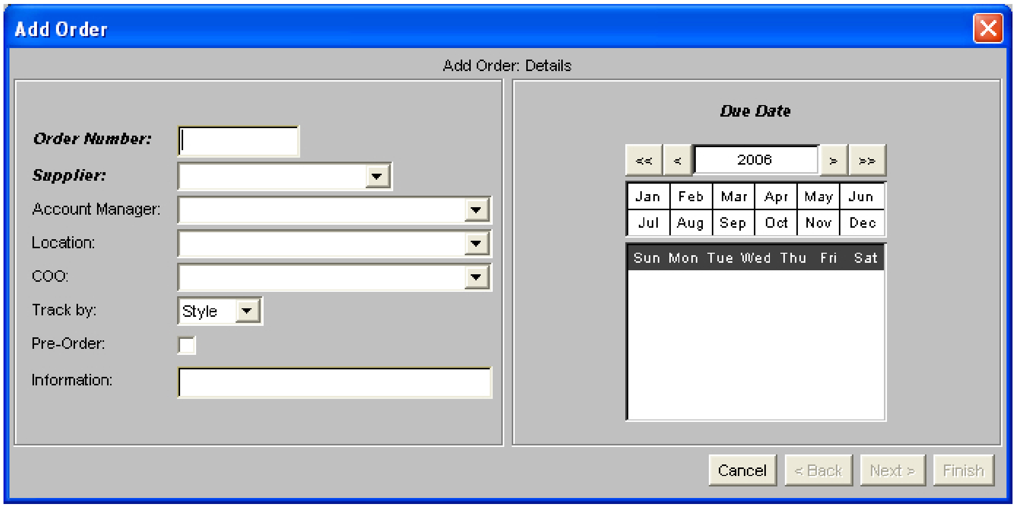


Number	Pre?	Created	Quantity	Supplier	Products	Due	Information
14500		01-Apr-00	1000	Max Brown Wholesales	1	22-May-00	□COMMENT= □ □
10062		08-Feb-00	25	CEP Import Supplier	1	08-Jun-00	□COMMENT= □
10063		08-Feb-00	6	CEP Import Supplier	1	08-Jun-00	□COMMENT= □
10089		08-Feb-00	1500	Max Brown Wholesales	1	08-Jun-00	□COMMENT= □
10091		08-Feb-00	300	CEP Import Supplier	1	08-Jun-00	□COMMENT= □
10091A		08-Feb-00	200	CEP Import Supplier	1	08-Jun-00	□COMMENT= □
90807		16-Jan-01	100	CEP Import Supplier	2	14-Feb-01	
98765		16-Jan-01	99	CEP Import Supplier	1	25-Feb-01	
123		15-Mar-01	500	CEP Import Supplier	1	20-Mar-01	
45654		16-Jan-01	25	CEP Import Supplier	1	24-Mar-01	
12345		16-Jan-01	500	CEP Import Supplier	1	25-Mar-01	
5000		31-May-01	100	CEP Import Supplier	1	20-Aug-01	
new order 12	✔	11-Jun-01	2310	CEP Import Supplier	4	01-Sep-01	□FOB Date/20010901120000 □Dest./tes
new order 13		11-Jun-01	60	CEP Import Supplier	2	01-Sep-01	□FOB Date/20011001120000 □Dest./tes
new order 14		11-Jun-01	880	CEP Import Supplier	6	30-Sep-01	□FOB Date/20010922120000 □Dest./tes
1761593TD		19-Jun-01	1	CEP Import Supplier	10	01-Oct-01	□3/PAKISTAN □2/KARACHI □
1Jodi		08-Nov-01	55	CEP Import Supplier	1	08-Nov-01	

WebTrack Products and Order window

Add Orders

1. On the Orders tab, click **Add Order**. The Add Order window opens.



Add Order window

2. Add information about your order. The required fields are:
   - Order Number
   - Supplier
   - Due Date
3. Select the due date for order delivery from the Due Date calendar.

   > **Note:** If the Pre-order check box is selected, a Supplier is not required at this time.

4. Click **Next** to continue. The Add Order: Choose Products window opens. Use this window to identify the products and quantities for this order.
5. To assign a different quantity to each product:

   a. Select a product in the Available Products list.
   b. Click the > button. The product in the Selected Products list.
   c. In the Selected Products window, double-click in the Quantity column for the product.
   d. Enter a quantity for the item.
6. If you want to assign the same quantity to all products:
   a. In the Default Quantity field, enter a value.
   b. Select the product. The default quantity is assigned automatically.
7. If it is enabled, click **Next** to continue. If Next is not enabled, click **Finish**.

   > **Note:** You can select several products at once, and move them to the Selected Products window with one click.

8. Confirm quantities (optional):
    a. If you selected Option in the Track By field, and your products are assigned multiple colors, the Add Order: Confirm Quantities window opens.
    b. Indicate the quantity for each individual style/color combination.
    For example, if a product has the quantity of 100, and four colors associated with it, specify the quantity for each color.
    c. When you have entered all the quantities, click **Finish**. The Options list tab opens. The new order should be listed.
9. Click the close window button to return to the User Console window.

Delete Orders

1. On the Orders tab, select the order you want to delete from the list.
2. Click **Delete Order**. A dialog box to confirm your decision.
3. Click **OK.** The order is permanently deleted from the list and the database.
4. Click the close window button to return to the User Console window.

View an Order

1. On the Orders tab, select the order you want to view.
2. Click **Review Orders**. The Review Order window opens.
3. Click **OK** to close the window.
4. Click the close window button to return to the User Console window.

Tracks

Create Tracks

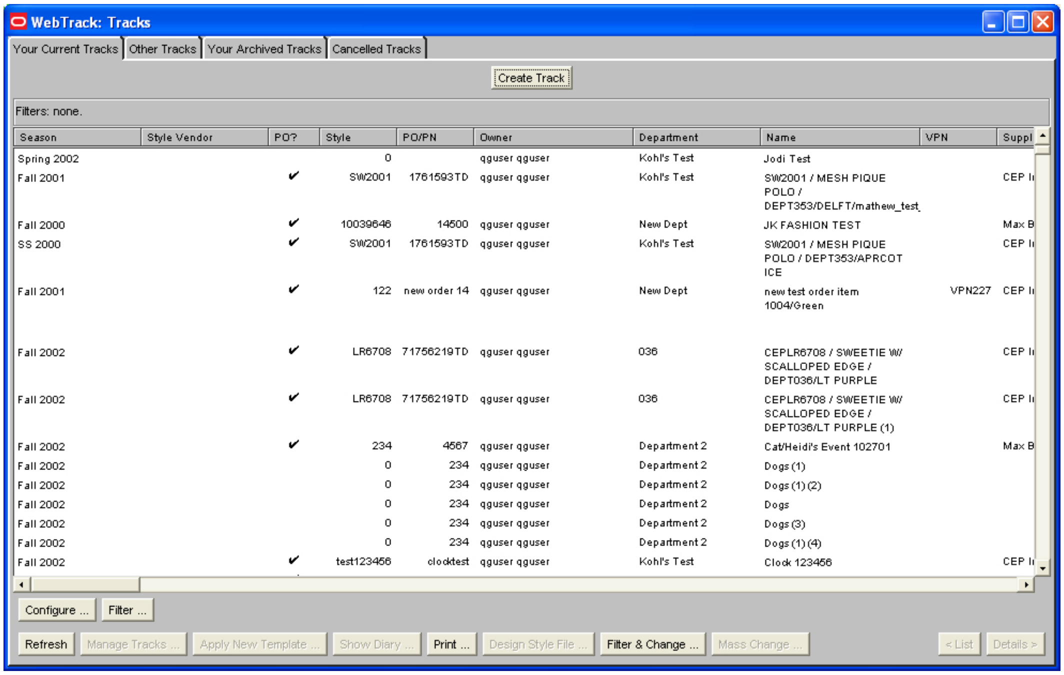
With WebTrack, a track notifies trading partners of expectations, schedules and event assignments. You use a template to start a track. In addition, style and PO data from your enterprise may be used as input for a track.

When you create a track, you choose to complete it as a published track or as a suspended track. A suspended track is a worksheet that can be amended prior to notifying your trading partners of its existence. When you create the track as a suspended track, you can modify it to meet "what if" scenarios or wait for final data before your sending to your trading partners.

If you create the track without selecting the suspended state, trading partners will receive e-mail alerts that notify them of events and expectations for their enterprise and other partners. Alternatively, you can select to hide expectations for other

trading partners; an enterprise would receive a schedule and alerts that only shows expectations for its enterprise.

Navigate: On the WebTrack User Console click Tracks. The WebTrack Tracks window opens.



WebTack Tracks window

Plan the Track

1. Map out the entire critical path. Include all event activities.
2. Determine the number of nested tracks required, if any.
3. Create the nested templates. Follow the Create a Template procedure.
   a. Create the first nested template. Schedule the last event to complete on Day 0.
   b. Create the second nested template. Schedule the last event to complete on Day 0.
4. Create the parent event. An event is not a parent event until the nested template is attached.

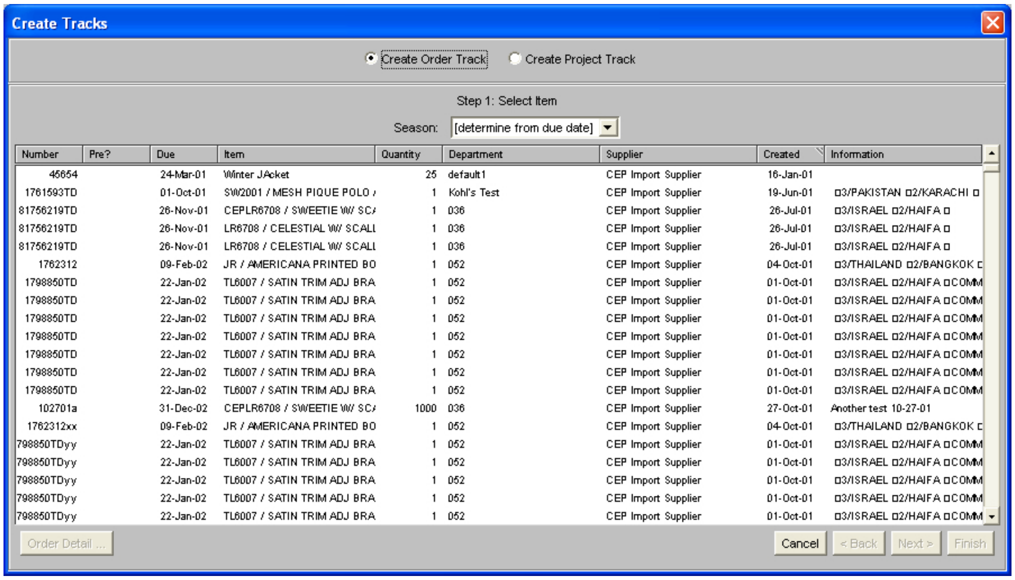
   Note: Parent events cannot be edited.

5. Create the master template. Follow the Create a Template procedure.
   a. Include parent events
   b. Set simple or multiple dependencies and cancellation rules
   c. Assign the track owner
   d. Determine lead times (days before an alert)

Create a Purchase Order Track

Note: Your user ID permissions must be set up to allow you to complete the steps.

1. Click Create New Track. The Create Tracks window opens.



Create Tracks window

2. Select the Create Order Track option.
3. In the Season drop-down list, select the season for the item (optional).
4. Click on a purchase order in the list to select it.

Note: If there are no POs in the list, return to the User Console and click PO to add a purchase order.

5. Click **Next.** The Step 2: Choose Template window opens.
6. From the folder frame, select the template. The events for the template are displayed.
7. The template displays any multiple dependencies and whether any of the events are parent events.
8. Click **Next**. The Create Tracks - Step 3 window opens.
9. Select the partner types, partners, and contacts from the drop-down lists.

Note: To automatically assign the partner who was assigned to the purchase order, click Select Item Supplier when you create the purchase order.

10. Click **Next**. Create Tracks - Step 4 window opens. To keep this track as a worksheet that will not be seen by trading partners, select the Create in suspended state check box. Trading partners will not receive any alerts regarding this track and it will not be visible to them.

11. If necessary, modify any event fields that are displayed in pink. Refer to field descriptions at the end of this procedure for more information. The editable fields are:
    - Sequencing / Cancel Rules
    - Partner
    - Contact
    - Days For
    - Date
12. Click **Add Event** to add events. Complete all the information for the new event.

    > **Note:** Finish is disabled until you enter all information for a new event. If an event type is Optional, click Delete Optional Event to remove an optional event from the track.

13. To change the order of the events, select the event, and then click Move Up or Move Down.

    > **Note:** When you move events, the lead times for the events remain unchanged. If there is a Parent Event in the track template, or you add an event that is a parent event, you activate the Nested Track button. Click Nested Track to view and amend the nested track. It is possible to make the same changes to a nested track as the parent track but if you change any details on the last event it will update the parent event with the same information.

14. Click **Finish**. If you chose to save this as a suspended track (Step 10), the track will display in the Your Tracks list. If you ignored the check box to suspend the track, the track is visible in the Other Tracks list.
15. Click the close window ☒ button to return to the User Console window.

Create a Project Track

> **Note:** Your user ID permissions must be set up by your administrator for you to complete the steps.

1. Click Create New Track. The Create Tracks window opens.
2. Select the Create Project Track option.
3. In the Season drop-down list, select the season for the item (optional).
4. Select a project in the list, and click Next. The Step 2: Choose Template window opens.

    > **Note:** If there are no projects in the list, return to the User Console, click Projects, and add a project.

5. From the directory at the left, select the template.
6. Click **Next**. The Create Tracks - Step 3 window opens.

> **Note:** When you select a template, its events are displayed in the window. You can change the timing of the track alerts, if the option to do so has been activated by the Administrator. If any events in your template are assigned to other Enterprises, a prompt opens.

7. In the Select Partner for Supplier Events area, Partner type field, select the type of partner that is responsible for supplier events.
8. In the Select Partner for Supplier Events area - Partner field, select the partner that is responsible for supplier events.
9. In the Select Partner for Supplier Events area - Contact field, select the contact for the partner that is responsible for supplier events.
10. If any events within your template are assigned to other enterprises, you are prompted to identify which of your trading partners is responsible for the events. If prompted, select the Partner type from the drop-down list, followed by the Partner and Contact.

> **Note:** To automatically assign the partner who was assigned to the purchase order, click Select Item Supplier when you create the purchase order.

11. Click **Next**. The Create Tracks - Step 4 window opens.
12. If necessary, modify any of the fields that are displayed in pink within the track. Refer to field descriptions at the end of this procedure for more information. These fields include:
    - Sequencing / Cancel Rules
    - Type
    - Partner
    - Contact
    - Days For
    - Date
13. To change the enterprise responsible for the event, double click in the event's Responsible field, then select the responsible enterprise.
14. To change the lead time for the event, double click in the event's Lead Time field, then enter the number of days needed for lead time to complete the event. Lead-time values must be in sequence from longest lead-time at the top of the list to 0 days for the last event.
15. To change the order of events, select the event, and then click Move Up or Move Down.

> **Note:** When you move events, the lead times for the events in the track remain unchanged.

16. To add events, click Add Event. Complete all the information for the new event.
17. To delete the event, click Delete Optional Event.

> **Note:** If you have a Parent Event Present in the track template or you add an event, which is a parent event, you will activate the Nested Track button.

18. To view and amend the nested track, click Nested Track. It is possible to make the same changes to a nested track as the parent track but if you change any details on the last event it will update the parent event with the same information.

> **Note:** Finish is disabled until you enter all information for a new event. If an event type is Optional, click Delete Optional Event to remove an optional event from the track.

19. Click **Finish** to publish the track.
20. Click the close window button to return to the User Console window.

Maintain Tracks

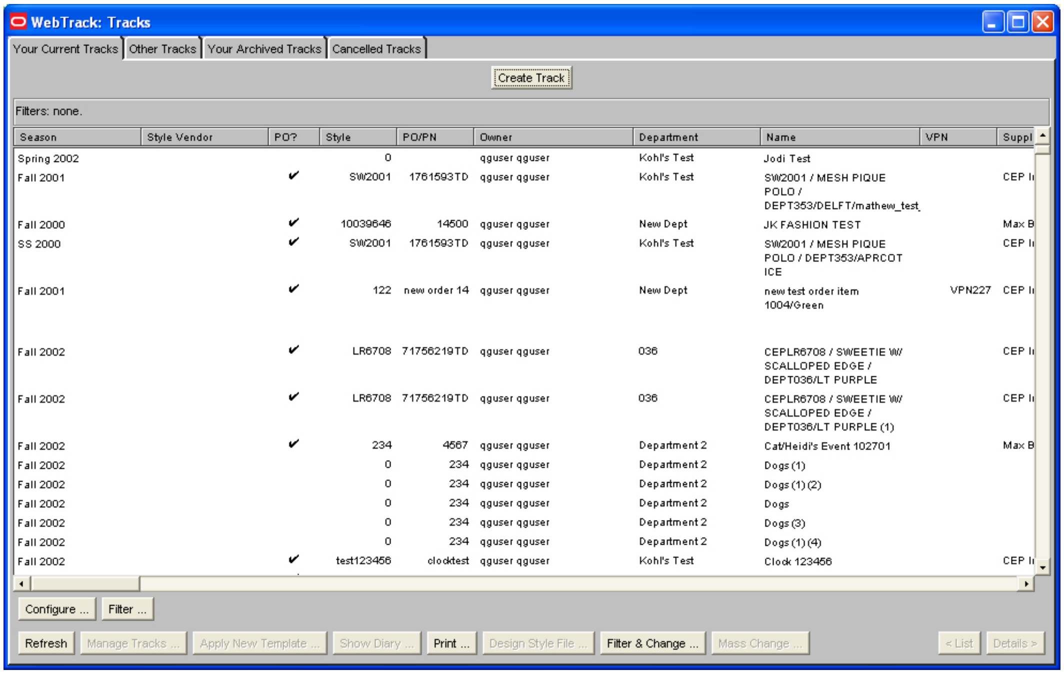
Your access to a track is governed by the user ID and by the track classification. You can change a track classification on a list window or a track details window of the Your Tracks or Other Tracks tabs.

When you change the status of the track, a check mark appears in the appropriate column indicating the action performed for both the enterprise and the trading partner. The event statuses are retained so that you have a history of its completion point before it is canceled.

When you suspend or unsuspend track, WebTrack will perform the following tasks:

- Send a notifying e-mail to all event owners.
- Suspend any linked nested tracks.
- Allow changes to events.
- Display a check mark in the Suspend column.
- Enter a history comment in the diary.

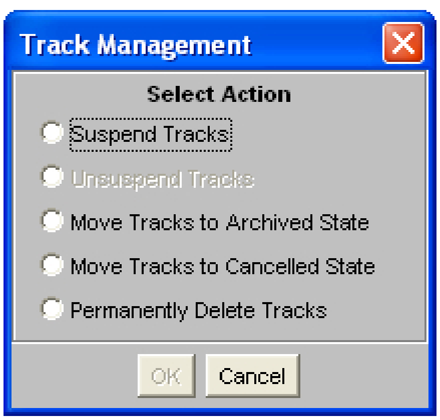
Navigate: On the User Console, click **Tracks**. The WebTrack Tracks window opens.



WebTack Tracks window

Manage Tracks

1. On a Tracks list or a Track details window, select the track to manage.
2. Click **Manage Tracks**. The Track Management window opens. Choose from the following:



Track Management Window

- Select the Suspend Tracks option.

Note: Suspended published tracks do not allow for any revised date changes.

- Select the Unsuspend Tracks option.
- Select the Move Tracks to Archived State option in the Track Management window.

> **Note:** Auto-archived tracks are not retrievable. If you think you may wish to activate a track at a later date, choose to cancel a track rather than archive a track. Archived tracks can be reinstated, but not if they have reached the auto-archive status. Tracks will also be automatically archived a number of days after they have been completed, based on the value the administrator has set up in the Administration Console Options window.

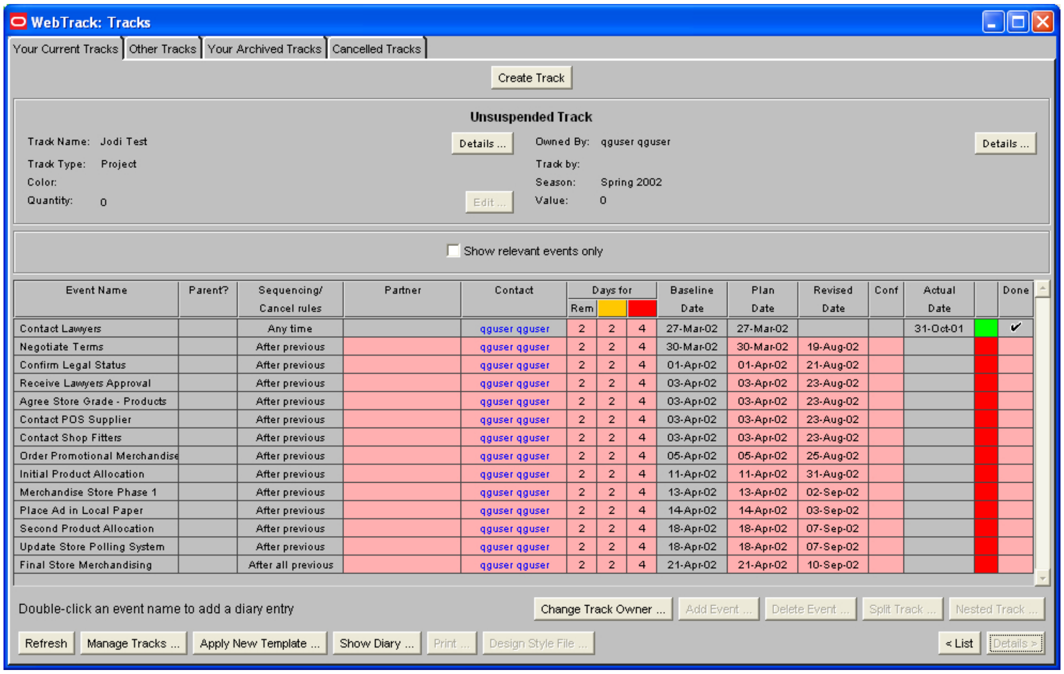
- In the Track Management window, select Move Tracks to Canceled State option.
- In the Track Management window, select the Permanently Delete tracks option.

> **Note:** You delete a track when you want to ensure that the track no longer exists. There will be no record of it. Your user ID permissions must be set to allow this procedure in order for you to complete the steps.

3. Click **OK** to accept actions or click **Cancel** to stop any of the actions.

Apply a New Template to a Track

Navigate: On the WebTrack User Console click **Tracks**. From the list of tracks, select a track. Click **Details**. The Your Current Track - Details window opens.



WebTrack Tracks window Details tab

> **Note:** You may apply a new template to a track only if the system administrator has granted you permission and you are the track owner.

1. Click **Apply New Template**. The Apply New Template window opens.

Apply New Template window

> **Note:** The type of template displayed, depends on the whether the track is a purchase order track or a project track.

2. Select the template you want to apply.
3. Click **Next**. The events in the new template are displayed.

> **Note:** You can select a new template only if it contains all the events in the current track.

4. Edit the template events as necessary.
5. Click **Finish**. The new template is applied to your track and logged in the track diary

> **Note:** Only dates that have not been manually revised are updated. Manually revised dates are not updated. Plan dates will be mass re-calculated on the track based on the lead times within the new template and the due date of the existing track.

Update a Plan Date

Navigate: On the WebTrack User Console click **Tracks**. From the list of tracks, select a track. Click **Details**. The Your Current Track - Details window opens.

> **Note:** You may update plan dates within tracks only if the system administrator has granted you the appropriate permission and you are the track owner.

1. Select an event and double-click in an editable Plan Date field. The Update Event dialog box opens.
2. Select Set plan date.
3. Select the year, month, and date of the new date.

> **Note:** Plan dates are updated for parent events only. You must adjust nested tracks and events individually.

4. If required, select the Update later event dates check box.

> **Note:** Only for the last event on the track, the user can select whether to update earlier events

5. Click **OK**. Plan date changes will be logged within the track diary.

> **Note:** Only dates that have not been manually revised are updated. Manually revised dates are not updated.

Update a Revised Date

Navigate: On the WebTrack User Console click **Tracks**. From the list of tracks, select a track. Click **Details**. The Your Current Track - Details window opens.

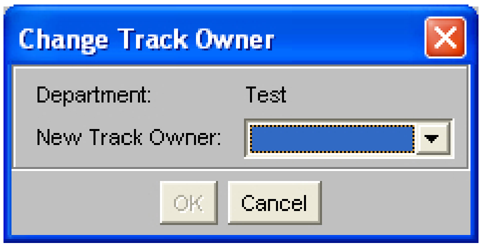
> **Note:** You may update revised dates within tracks only if the system administrator has granted you the appropriate permission and you are the track owner.

1. Select an event and double-click in an editable Revised Date field. The Update Event dialog box opens.
2. Select Set revised date.
3. Select the year, month, and date of the new date.
4. To confirm the new dates, select the Confirm revised date check box.
5. Click **OK**. Date changes will be logged within the track diary.

Change a Track Owner

Navigate: On the WebTrack User Console click **Tracks**. From the list of tracks, select a track. Click **Details**. The Your Current Track **-** Details window opens.

1. Click **Change Track Owner**. The Change Track Owner window opens.



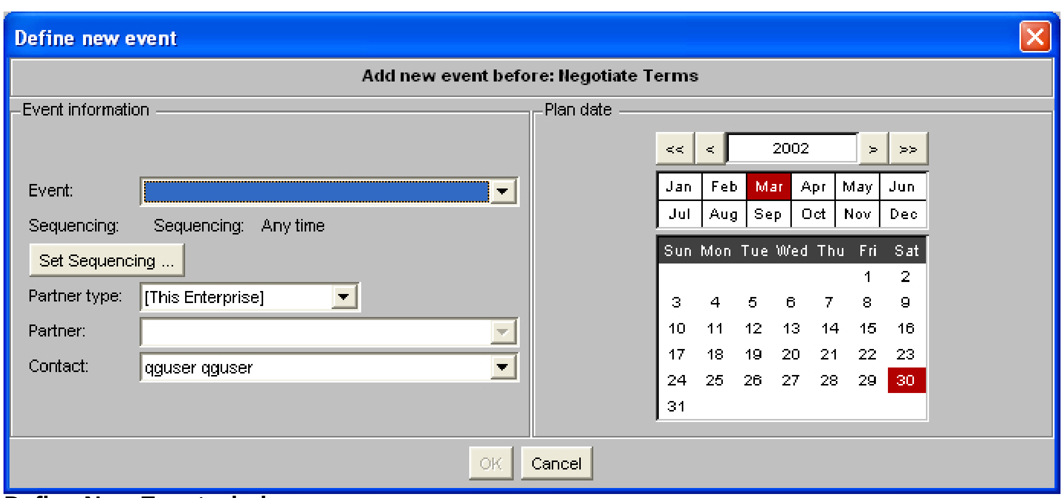
Change Track Owner window

2. In the New Track Owner field, select the name of the new track owner from the drop-down list.
3. Click **OK**.

Add an Event to the Track

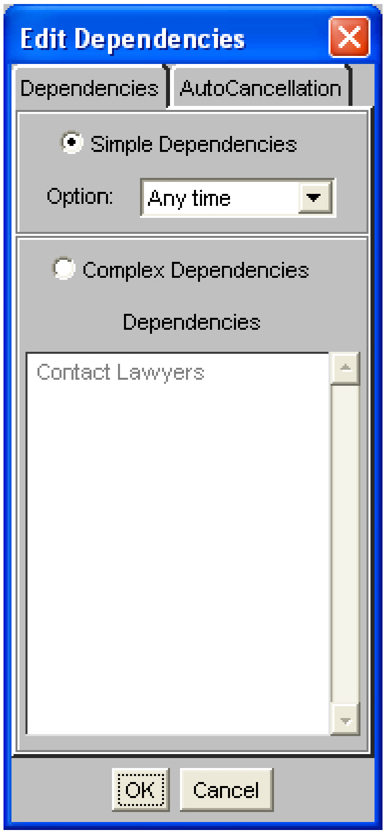
Navigate: On the WebTrack User Console click **Tracks**. From the list of tracks, select a track. Click **Details**. The Your Current Track **-** Details window opens.

1. On the details screen of the selected track, determine where the new event should occur in the list of events, and select the event row that follows the event you wish to add to the list.
2. Click **Add Event**. The Define New Event window opens.



Define New Event window

3. In the Event drop-down list, select an event.
4. Click **Set Sequencing**. The Edit Dependencies window opens.



Edit Dependencies window

5. Select the Dependencies tab to set the sequence of events and choose one of the following radio buttons:
   - Simple Dependencies. In the Options field, select one of the following:
     - Any time: This event can be completed anytime in the life span of the track. This is the default option for the first event on the template.
     - After previous: This event can be marked complete only when the previous event is complete.
     - After all previous: This event can be marked complete only when all previous events are complete.
   - Complex Dependencies
     - In the Dependencies area, select the events that must be completed before this event can occur.

6. To set rules for automatically canceling this event based on the cancellation or completion of other events within the track, select the AutoCancellation tab:
   a. From the list of other events in the track, select one or more that must be completed or cancelled before this event is to be cancelled.

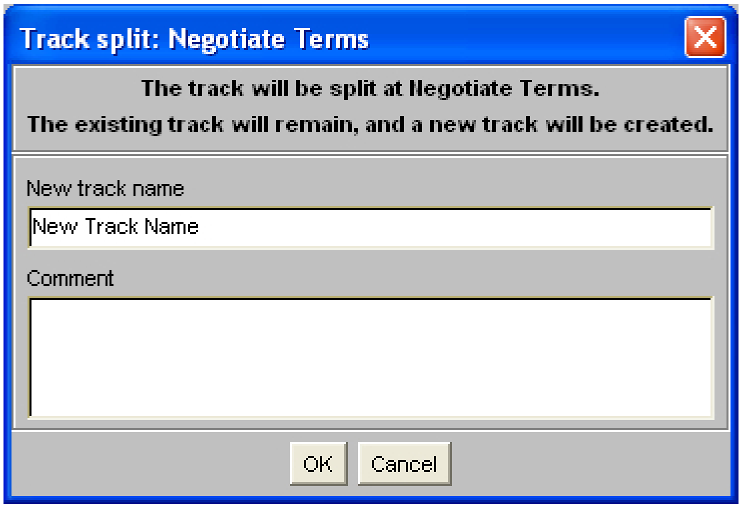
      Note: Only events that do not have dependencies or are not dependent on the selected event will appear within the list of events that can be used to define the cancellation rules.

   b. If you chose only one of the other events, the event being maintained will cancel upon completion or cancellation of the selected event. If you chose more than one of the other events, chose one of the following options:
      - Cancel When All Complete: This event being maintained will be cancelled upon the cancellation or completion of all of the other events you selected.
      - Cancel When Any Complete: This event being maintained will be cancelled upon the cancellation or completion of any of the other events you selected.
7. Select an appropriate dependency from the list below.
   - Any time: This event can occur anytime in the life span of the track. Always select Any time: for the first event on the template.
   - After previous: This event can be marked complete only when the previous event is complete.
   - After all previous: This event can be marked complete only when all previous events are complete.
   - Complex dependencies: This event can only be completed after the events specified have been completed. For multiple dependencies, you name one or more specific events that must be completed before this event is completed.
8. Click **OK**. The Select Dependencies window closes and the event detail window opens.
9. When all event fields are entered, click **Save** to save the changes.

Copy a Track

Navigate: On the WebTrack User Console click Tracks. From the list of tracks, select a track. Click Details. The Your Current Track - Details window opens.

1. On the track details window, highlight the name of the event where you want to split the track.
2. Click **Split Tracks**. The Split Tracks window opens.



Split Track window

3. To copy the track, select the Copy track without changing quantities check box.
4. Click **OK** to save the new copy. A new track is saved. The track has the same title as the sister track but has the number 2 appended.

Split a Track

Navigate: On the WebTrack User Console click Tracks. From the list of tracks, select a track. Click Details. The Your Current Track - Details window opens.

1. On the track details window, highlight the name of the event where you want to split the track.
2. Click **Split Tracks**. The Split Tracks window opens.
3. Select Split Track and quantities.
4. Select the color you wish to split.
5. Enter a name for the new track.
6. Enter an item quantity or any comments you may save.
7. Click **OK**. The new track exists and on the list display.

Update a Style File

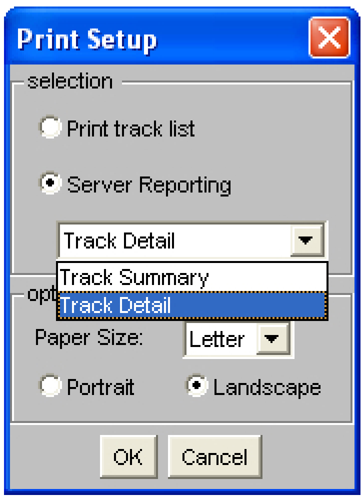
Navigate: On the WebTrack User Console click Tracks. From the list of tracks, select a track. Click Details. The Your Current Track - Details window opens.

- Click **Design Program**. Oracle Retail Design is launched.

> **Note:** for information on how to use Oracle Retail Design, reference the Oracle Retail Design Online Help or the Oracle Retail Design User Guide.

Print a track report

1. Click **Print**. The Print Setup window opens.



Print Setup window

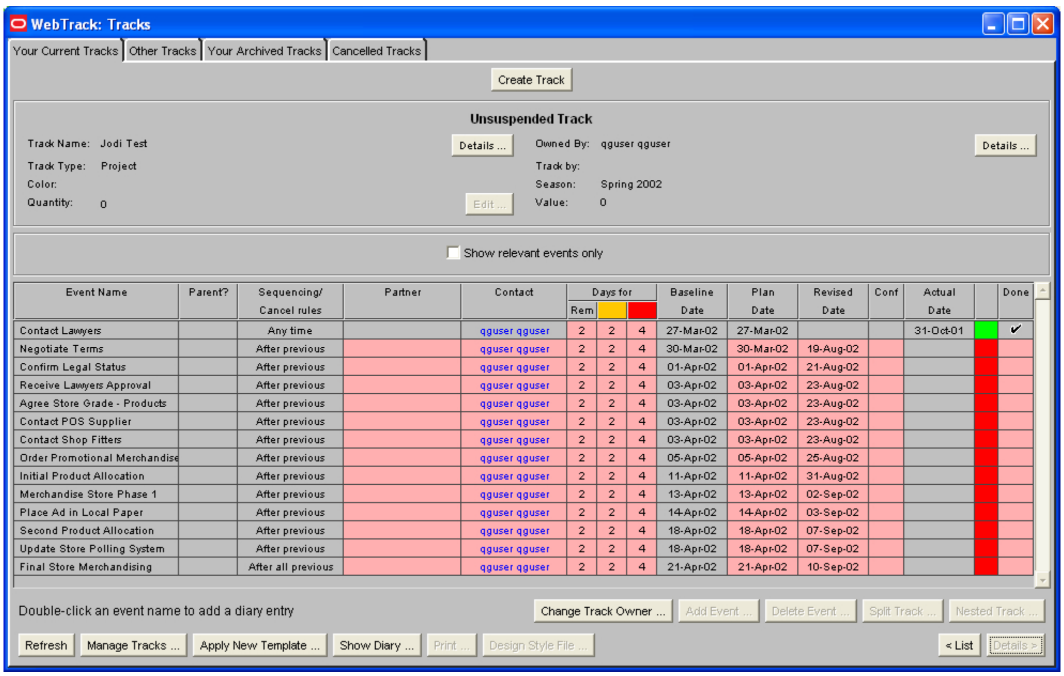
2. Select the type of report
   - Select Print track list to print the track list report.
   - Select Server Reporting to print a report using a track report template.
     - Select the track report template from the drop down list.
3. Select the paper size from the drop down list.
4. Select portrait or landscape.
5. Click **OK**.

Maintain Track Events

One of the key processes with WebTrack involves the editing of track details and events. As changes within a project or purchase order being tracked occur, they must be updated within WebTrack for visibility across the supply chain. As updates occur, WebTrack will automatically log changes within the track diary and can be configured to send automatic email notifications.

Because there may be situations where event owners are not able to update their events in a timely manner, WebTrack provides the ability to assign alternates users to event owners. Assigned alternates, working within their defined permissions, are able to work on behalf of an event owner performing a number of basic event update functions. If updates are made by the alternate user, all changes will be logged in the diary under the username of the alternate user. The event owner will continue to receive email notifications about the event.

Navigate: On the WebTrack User Console click **Tracks**. From the list of tracks, select a track. Click **Details**. The Your Current Track - Details window opens.



WebTrack Tracks window Details tab

Edit the Event and Track Schedule

WebTrack sends messages or alerts to the event owner and trading partners who need to know of progress toward track or event completion. The owner of the track may be notified of a date revision request by e-mail. Before a planned date can be changed, the track owner must approve the proposed revision date.

> **Note:** When an event is marked complete, the system automatically assigns the current date as the completed date. You cannot change this date to any other value. Once you mark an event as complete and click OK, you cannot edit the event or change its status.

1. Double-click on the number you want to change in one of the Days for column. The field opens into a drop-down list. The defaults for alerts are the following:
   - Send an alert 2 days past Amber
   - Send an alert 2 days past red
2. Select the new number of days from the drop-down list.
3. Select another number, or select No.

> **Note:** No indicates that there is no lead-time available.

Mark an Event Complete

1. Double-click in the Done field of the selected event. The Update Event window with the Mark event complete radio button selected.
2. Click **OK** to complete the event. A check mark in the done column and the date completed in the Actual Date field.

> **Note:** When an event is marked complete, the system automatically reviews the defined cancellation logic. If this event completion causes another event to be cancelled, this change will occur automatically and the update will be logged within the diary.

Cancel an Event

1. Click on the Plan date field or Done field of the event you want to cancel. The Update Event window opens.
2. Click **Cancel Event**.

> **Note:** When an event is cancelled, the system automatically reviews the defined cancellation logic. If this event cancellation causes another event to be cancelled, this change will occur automatically and the update will be logged within the diary.

3. Click **OK** to confirm your decision. An X mark in the Done column to indicate that the event has been canceled. The date completed in the Actual Date field.

Delete Events

You can delete one event or several events at a time. The Delete Event action removes all entries from reports, but the diary is updated with a text entry. Trading partners receive an e-mail that notifies them of the event deletion.

When an event is deleted, the event will also be deleted from the dependency and cancellation list. All other dependencies and cancellation rules will remain. The dependencies can be viewed by double clicking on (multiple) for that event. Where only one dependency remains, the event name will be displayed in the sequencing column.

Note: Permission for the Delete events procedure is assigned in the user ID set up procedure. If you are unable to delete an event, contact your WebTrack administrator.

1. Select one event, or press the control key and left-click each event to select more than one event.
2. Click **Delete Event**. A dialog window opens.
3. Click **OK** to confirm the request, or click **Cancel** to return to the previous window.

Add an Entry to an Event Diary

Note: You make manual entries to a track diary on the details window of the Your Tracks tab or the Other Tracks tab.

1. Click **Show Diary**. The event diary window opens. The diary entries are recorded by WebTrack or entered manually by the event owner. Two different viewing options are available by selecting the List view or Text view.

   Note: Your diary view preference will be saved upon exiting. Therefore, the next time you log in to WebTrack and views the diary, it will appear in the most recently selected view

2. Double-click on the event name. The Add Diary Entry dialog box opens.

   Note: The information in this window is determined by the Administration logon for Events.

3. Select a predefined diary entry from the Reason drop-down list, type your entry in the text field, or both.

4. To send an email notification of this diary entry:
   a. Check the Send as Email box and click **OK**. The Choose Recipients window opens. This window has three areas:
      - Type Addresses - a free-form text area that allows you to enter complete email addresses manually. The email address must include the full domain name (for example, email@oracle.com). Separate multiple addresses with a comma (,) or a semi-colon (;).

        Note: The system will only edit the email address to ensure that an ampersand (@) appears within the email address and that a dot (.) appears after the ampersand (@). No other edits will be performed. If an invalid email address was entered in the proper format, the email will appear to be sent. The system will not support undeliverable email notifications.

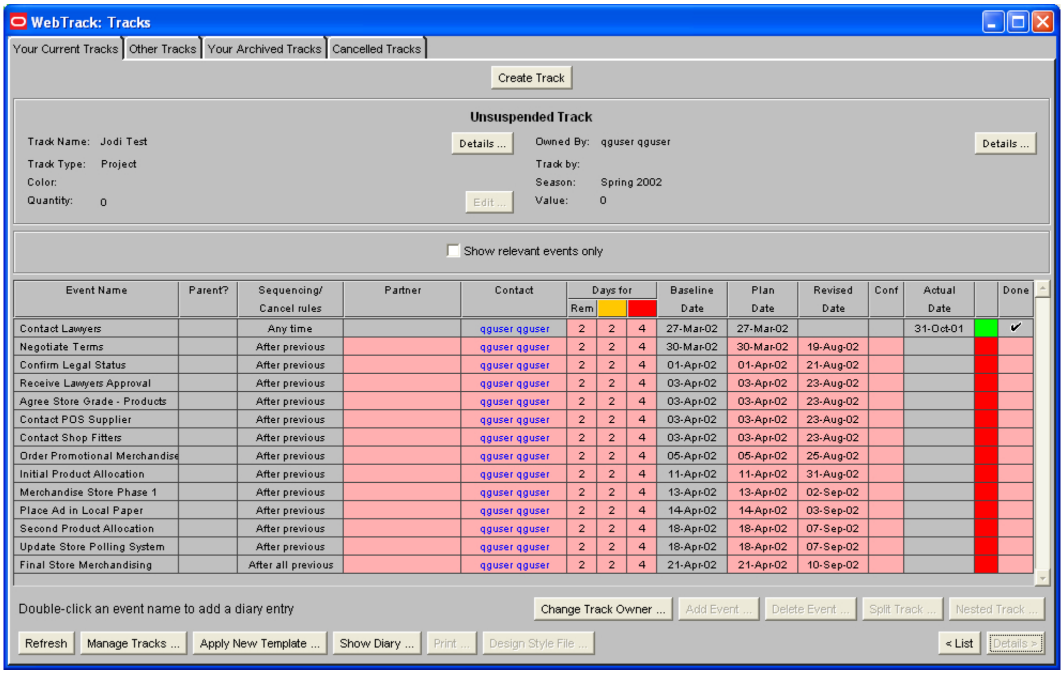
      - Choose Users - a drop-down list from which you can select the set of users to appear within the Available and Selected users panes. Track users will appear as the default and this will include all users that appear as event owners within the track. [This Enterprise] will always be an option and will allow the user to have all users set up within their enterprise to appear within the Available and Selected users panes. Finally, any trading partner enterprises that have been set up on the track will appear as options within this drop-down list. If this option is selected, only account managers for the trading partner will appear within the Available and Selected users panes.
      - Available Users - a list of users within the track, within the enterprise or within trading partner enterprises included in the track. Select user names and move them to the Selected Users list by clicking the right arrow button. Remove user names from the Selected Users list by selecting the name and clicking the left arrow button.
   b. Use any or all of the areas to specify email addresses for recipients of the diary event notification.
5. Click **OK** to save the diary entry and send the email notification, if requested. All selected email addresses will be logged within the diary.

View Tracks

One of the key processes with Webtrack involves the editing of track details and events. As changes within a project or purchase order being tracked occur, they must be updated within Webtrack for visibility across the supply chain. As updates occur, Webtrack will automatically log changes within the track diary and can be configured to send automatic email notifications.

> **Note:** Follow the procedures in this section to edit your current tracks. Procedures may vary for purchase order or product tracks.

Navigate: On the WebTrack User Console click **Tracks**. From the list of tracks, select a track. Click **Details**. The Your Current Track - Details window opens.



WebTrack Tracks window Details tab

View Track Details

1. Identify the incomplete tasks. If a check mark is not displayed in the Done column, it is incomplete.
2. To view only events that you are responsible for, select the Show relevant events check box.
3. Click the close window  button to return to the User Console window.

View an Event Diary

1. Click **Show Diary**. The event diary window opens. The diary entries are recorded by WebTrack or entered manually by the event owner.
   - To view the diary events as a list, select the List View radio button.
   - To view the diary events as text only, select the Text View radio button.
2. Click **OK** to close the event diary.
3. Click the close window button to return to the User Console window.

View Nested Tracks

1. On the track details window, highlight the name of the parent event. Parent events are displayed with a check mark in the Parent? column.
2. Click **Nested Tracks**. The Nested tracks window opens.

> **Note:** If you are not the owner of the nested track you will not be able to edit.

Maintain the User View of the Track List

In WebTrack, tracks are grouped for easy access. They are grouped by the following: owner, completion status, and Active or Canceled status. Four lists of tracks are displayed in the WebTrack Tracks window. The categories are as follows:

- Your Current Tracks - view tracks that you created and own. These tracks are currently in use. For these tracks, you can choose the information you display about the tracks, filter the list to select tracks with one or more common characteristics, and change specific details about a group of tracks. View event details by selecting the track name and clicking Details or by double-clicking the track name. Parent and nested level tracks can be displayed.

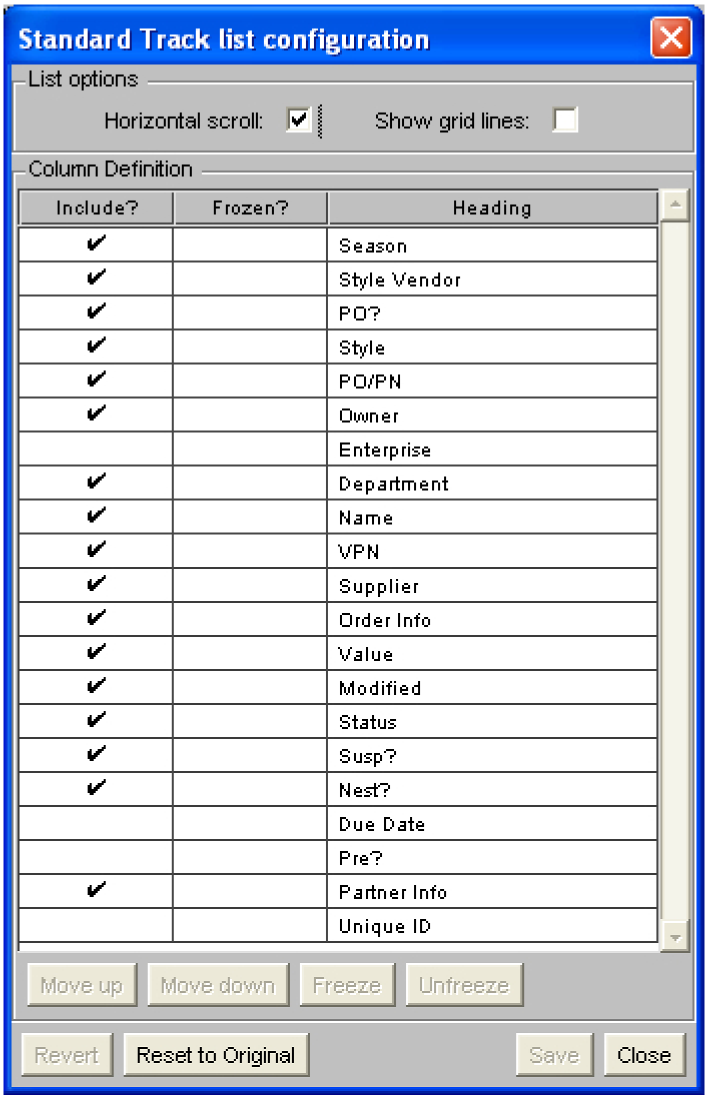
  > **Note:** You will start the Create Tracks procedure on the Your Current Tracks tab.

- Other Tracks - view tracks created by other members of your enterprise or trading partners who assigned you as the owner of an event. On the Other Tracks tab, you can filter the list to select tracks with one or more common characteristics, and change specific details about a group of tracks.
- Your Archived Tracks - view the tracks you created, and own, but are no longer in use. On the Archived Tracks tab, you can configure the track information displayed and filter the list of tracks. Archived tracks can also be reinstated.
- Canceled Tracks - view tracks that have been canceled. Canceled tracks can be reinstated.

Configure the Track List Display

This procedure allows you to configure the list displays for the tracks that you created or own. You can also configure the display for the Other Tracks tab. When you configure the tracks display, you select the information to be displayed in each column, and you select the order of the columns.

Navigate: On the WebTrack User Console click **Tracks**. The WebTrack: Tracks window opens. Click **Configure**. The Standard Track List Configuration window opens.



Standard Track List Configuration Window

1. To add or remove specific columns, click in the Include? cell next to a heading you want to display. The heading is highlighted.
2. Double-click in the cell. A check mark opens. This heading will be included.
3. To change column order:
   - To move a heading topic up, click **Move up**.
   - To move a heading topic down, click **Move down**.
4. To freeze a row, click **Freeze.**

5. To unfreeze the particular row, click **Unfreeze**.

> **Note:** To select more than one row, hold the shift key and select the rows from the top of the list. This will freeze all columns selected from left to right. You are unable to freeze rows, which are inconsequential, and you must begin with the first column on the list.

6. To erase your last keystroke, click **Revert**.
7. To confirm all changes in this window, click **Save**.
8. To restore the Enterprise administrator display settings, click **Defaults**.

Filter the Track List View

> **Note:** This procedure applies to the current tracks, archived tracks, or canceled tracks lists. There is the ability to carry out wildcard searches using an asterisk (*).

Navigate: On the WebTrack User Console click **Tracks**. The WebTrack: Tracks window opens. Click **Filter**. The Filter Options window opens.

1. Make appropriate selections from the drop-down lists or entries as needed.
2. Click **OK** to apply the filter to the list.

View Track Details

A track details window displays the status of each event, track dependencies, the name of the track owner, the track due date, and the current status of the track. Refer to the Edit track details section procedures to edit a track.

Navigate: On the WebTrack User Console click **Tracks**. The WebTrack: Tracks window opens. From the Tracks list window, click on the **Your Current Tracks** tab. To view an individual track, select the track in the list and click Details or double-click on the track. The Single Track details window opens.

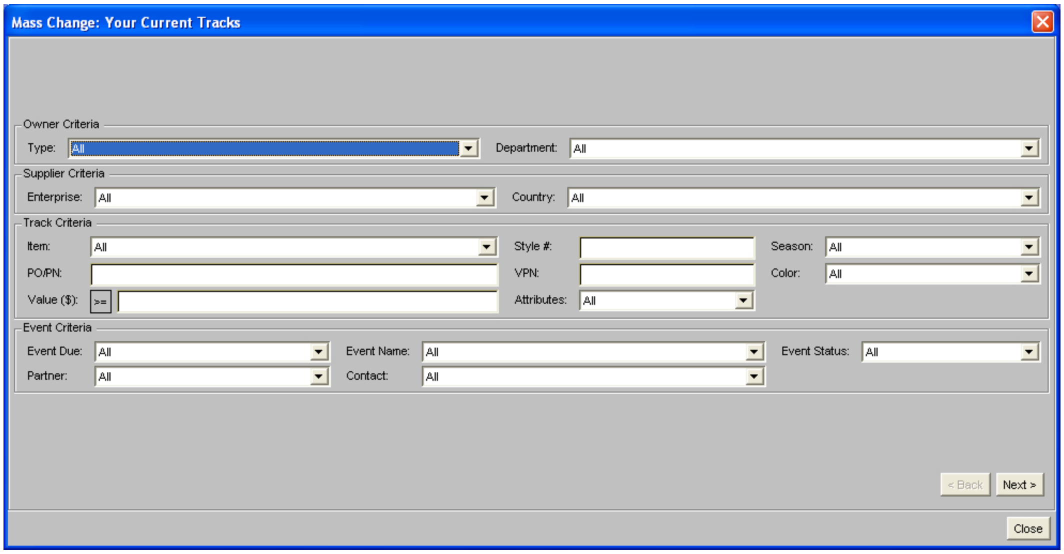
1. Identify the incomplete tasks. If a check mark is not displayed for an activity, it is incomplete.
2. To view only events that you are responsible for, select the Show relevant events check box.
3. In the details section you are able to revise the completion date, mark assigned events as complete and cancel events.
4. To view the track diary, click **Show Diary**. The track diary opens.
5. Click **List** to redisplay the list of tracks.

> **Note:** You can update the event fields that are displayed in pink. Refer to the View and edit track details section.

Apply Filters to Select Tracks For Maintenance

All tracks in the Track lists can be filtered by track attributes. For example, you can filter according to track owner, event due dates, or event status. In the Your Current Tracks list, you can change owner, supplier, track, and event criteria. In the Other Tracks list, you can change owner, track, and event criteria.

Navigate: On the WebTrack User Console, click **Tracks**. The WebTrack: Tracks window opens. On the WebTrack Tracks window - Your Current Tracks tab, click **Filter & Change**. The Mass Change window opens.



Mass Change Window

1. Select or enter filter criteria as desired.

> **Note:** In any of the fields with drop-down lists on the Mass Change: Your Current Tracks window, you can select All to choose not to filter on that criterion.

2. Click **Next**. The Confirm Edit window opens.

> **Note:** The Confirm Edit window after you edit.

3. Click **Next**. The track search will be based on ALL tracks in your track list summary. Tracks that meet the specified criteria are displayed in the mass change table. Data displayed in amber can be edited. The Mass Change: Your Current Tracks window - Table opens.
4. To change an event partner type, partner, or contact:
   a. Double-click on the name in the Partner row. The Edit Event Contact dialog box opens.
   b. For a Project list, select the Partner Type, Partner, and Contact from the drop-down lists.
   c. For a Purchase Order list, click Select Item Supplier to select the Partner Type, Partner, and Contact information to the defaults data.
   d. If you want to update all events that have the same owner, select the Update all matching events with this owner check box.

5. Click **OK** to save the information and return to the mass change table.

   > **Note:** A dialog box , confirming the change. Click **OK** to reconfirm the change.

6. To change the number of days before the reminder, Amber alert, and red alert:
   a. Double-click in the number of days field you wish to change.
   b. Select the number you want from the drop-down list.
7. To change the date of an event:
   a. Double-click on the date you wish to change. The Update Event dialog box opens.
   b. Select one of the following:
      - Revise date - Select the Revise date option and select a new date from the calendar.
      - Complete - Select the Mark event complete option.
      - Cancel - Select the Cancel event option.
      - Update - Select the Update later event dates check box.
8. Click **OK** to save your changes. A dialog box , confirming the change. Click **OK** to reconfirm the change.

   > **Note:** If the event date has dependencies, or events follow it sequentially, making a mass change to one of the event dates will update the other track events accordingly if the Update Later Event Dates is selected. To revert any subsequent events to the original dates, you will have to manually reenter all of those dates.

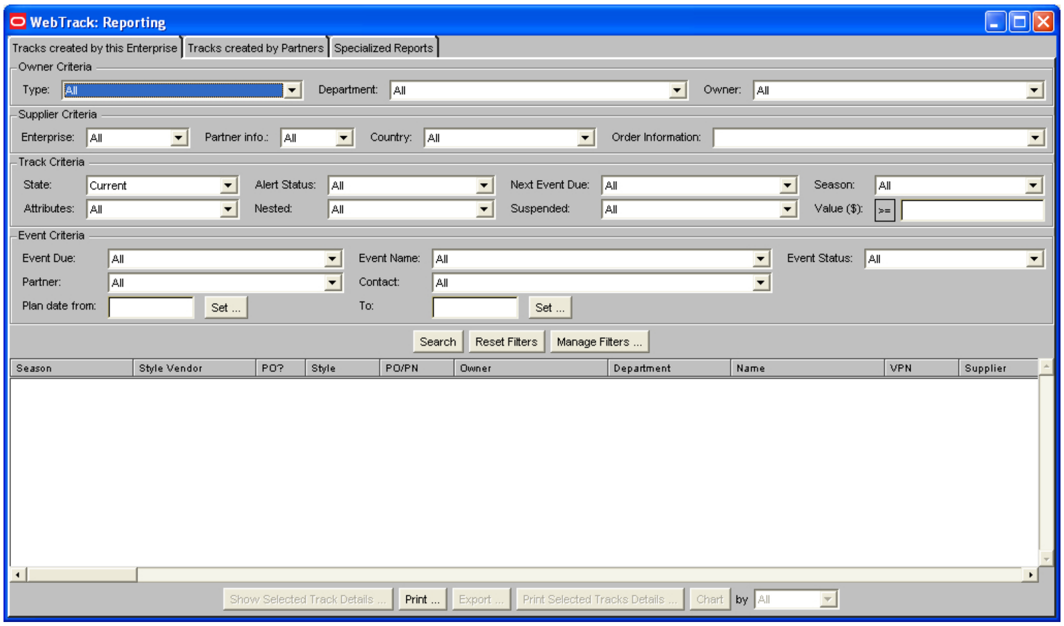
9. Click **Close Window** to close the Mass Change: Your Current Tracks - Table window and save the changes.

Reports

Search and Filter for Tracks

You can use filters to create a specific list of tracks and filter the data you want to see for each track in that list.

Navigate: On the User Console, click **Reports**. The WebTrack Reporting window opens.



WebTrack Reporting window

Search For Tracks

1. Select the type of track you want reports for:
   - To search for tracks maintained by your enterprise, click the Tracks Created by this Enterprise tab.
   - To search for tracks maintained by a partner, click the Tracks Created by Partners tab.
2. In the Criteria areas, select or enter additional information to make the search more restrictive.
3. Click **Search**. The results are displayed table below.

Create a Filter

1. Select the type of track you want reports for:
   - To search for tracks maintained by your enterprise, click the Tracks Created by this Enterprise tab.
   - To search for tracks maintained by a partner, click the Tracks Created by Partners tab.
2. In the Criteria areas, select or enter additional information to make the search more restrictive.
3. Click **Manage Filters**. The Manage Filters window opens.
4. In the Name field, enter the filter name.

Use a Filter

1. Click **Manage Filters**. The Manage Filters window opens.
2. Select a filter.
3. Click **Load**. The Manage Filters window is closed.
4. Click **Search**. The results are displayed table below.

Delete a Filter

1. Click **Manage Filters**. The Manage Filters window opens.
2. Select a filter.
3. Click **Delete**. The filter is removed from the list
4. Click **Save**. The window is closed.

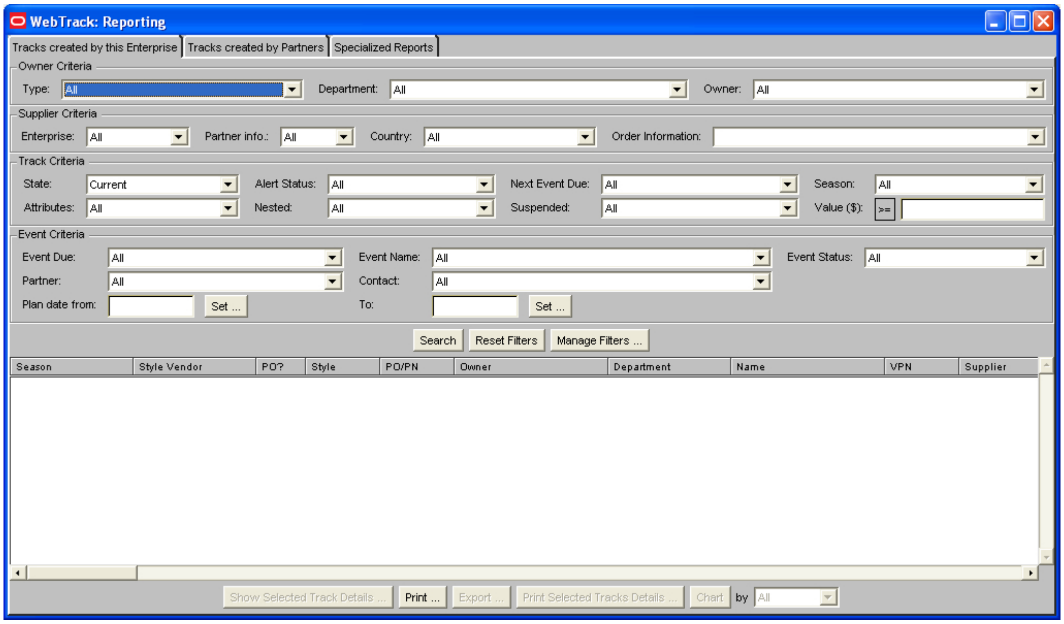
Create Enterprise or Partner Reports

The reporting function allows you to see track results for the tracks that are maintained within WebTrack.

You can create report for tracks managed by your enterprise or a partner. You can create specialized reports which allow you to see information not included in the enterprise and partner track reports.

Finally, you can print, view, or chart the results of your search. A summary chart allows you to view the percentage and number of alerts for a track and the total for all activity in a track.

Navigate: On the User Console, click **Reports**. The WebTrack Reporting window opens.



WebTrack Reporting window

Print the Report

1. Search for a track or use a filter to find tracks.
2. Click **Print**. The Print Setup window opens.
3. In the selection area, select what you want to print.
   - Select Filters and results, to print the criteria used for the search and the results.
   - Select Results only, to print the results of the search.
4. In the options area, select the paper size you want to use to print on.
5. Click **OK**. A PDF is created.
6. From the File menu, select Print. The Print window opens.
7. Click **Print**.
8. Click **OK** to send the PDF to the printer.

Print the Details Of a Track

1. Search for a track or use a filter to find tracks.
2. In the results area, select a track.
3. Click **Print Selected Track Details**. A browser window opens.
4. From the File menu, select Print. The Print window opens.
5. Click **Print**.
6. Click **Dismiss** or **Close** to close the browser window.

Export a Report to Excel

1. Search for a track or use a filter to find tracks.
2. In the results area, select a track.
3. Click **Export**. A browser window opens.
4. In the File Name field, enter the name you want to save the report as.
5. Click **Save**. Your report is save as an Excel spreadsheet.

View Track Details

1. On the WebTrack Reporting window, select the tracks you want to view. You can select more than one track.
2. Click **Show Selected Track Details**. Details of the first selected track are displayed in a new window.
3. If you selected more than one track, click **Next Track** or **Previous Track** to view another selected track.
4. Click **OK** to close the window.

View a Summary Chart

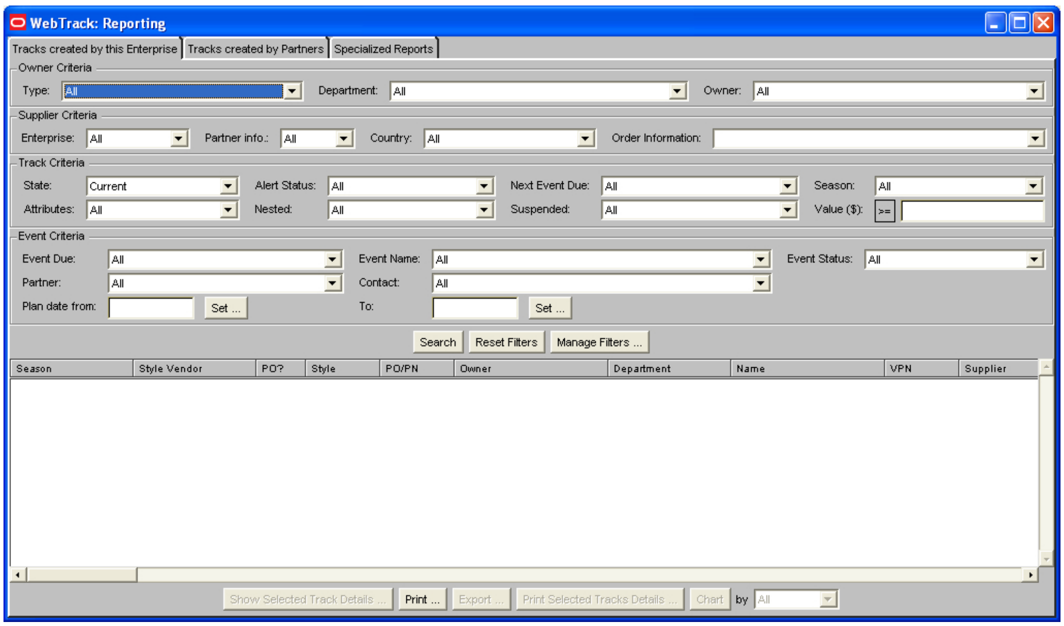
1. Search for a track or use a filter to find tracks.
2. In the criteria field to the right of the Chart button, select the information you want to chart.
3. Click **Chart**. The Summary Chart window opens.
4. Click **OK** to close.

Create Specialized Reports

Specialized reports allow you to report on the detail level of the tracks that are in your enterprise. There are four specialized reports that you can create in WebTrack:

- Event Schedule: Allows you to search for order tracks by event.
- Red Alert Report: Allows you to search for order tracks that have moved to a red state.
- To Do List Report: Allows to search for tracks by event status.
- Performance report: Allows you to search for order tracks and measure their completion

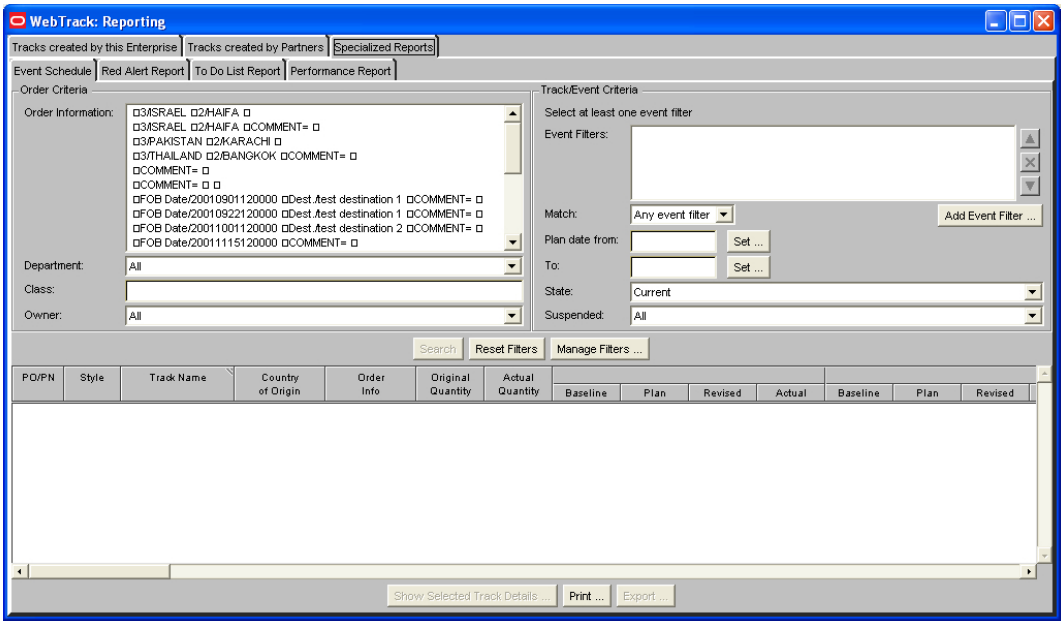
Navigate: On the User Console, click **Reports**. The WebTrack Reporting window opens.



WebTrack Reporting window

Create Specialized Reports

1. Click on the **Specialized Reports** tab. The Specialized Reports tab of the reporting window opens.



Specialized Reports tab

2. Select the report tab for the report you want to create.
3. In the Order Criteria area, select the order information you want to search by.
4. In the Track/Event Criteria area, select the track and event information you want to search by.
5. Click **Search**. The order tracks that match you criteria are displayed in the results area.
6. You can print the report, export the reports, or view track details.

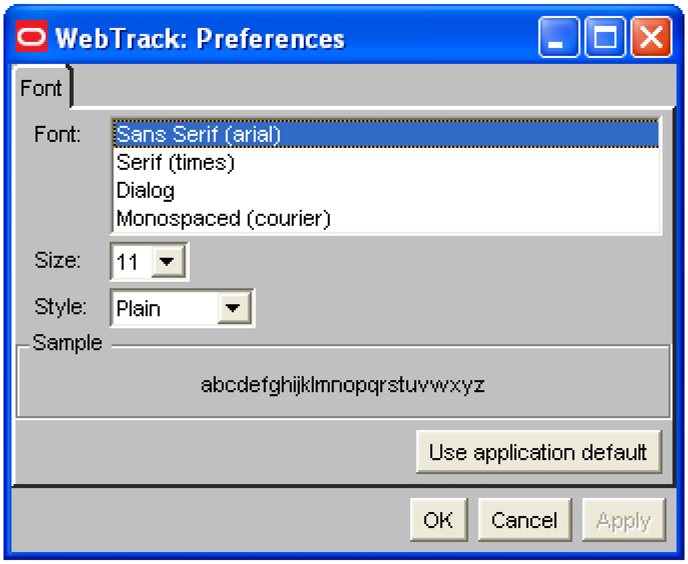
Update Events

1. Click on the **Specialized Reports** tab.
2. Select the To Do List Report tab.
3. Create a specialized report.
4. Select the event you want to update.
5. Click **Update Events**. The Update Events window opens.
6. Select the Mark event complete check box.
7. Click **OK** to save any changes and close the window.

Set Up Preferences

With WebTrack, all data, buttons, and tabs in WebTrack windows are displayed in the font size and style that you select. Use Preferences to select your preferred font style and size. The default font is in Sans Serif (Arial), at 11 point size, Plain.

Navigate: On the User Console, click **Preferences**. The WebTrack Preferences window opens.



Preferences window

Select the Font

Note: You can select your own font, or use the application default. Click Use Application Default to select the default application settings.

1. In the Font field on the WebTrack Preferences window, select the font type from the list.
2. In the Size drop-down list, select the font size.
3. In the Style drop-down list, select the font style.
4. Click **Apply** to save the selections.
5. To close the window, click **OK**, or click **Close**.

Glossary

A

Account Number: The number of your account with your trading partner.

Address: The place where an entity is located.

Amount: The monetary number or quantity.

Author: The creator of the document.

Available: A selection can be used.

Average Item Cost: The total cost of all units of all items, divided by the total number of units.

Average Selling Price: The per unit average retail price computed by Design. The average depends on the ratio of price to quantity.

Average VAT Rate %: The average per unit rate of value added tax computed by Design. The average depends on the VAT percentage and the quantity of a size.

B

Buyer: The person responsible for the purchase of merchandise, products, materials, or services.

C

Cache Size: A size limit, in megabytes (MB), for data and images to be cached to your local directory.

Category: The group which associate like things.

City: An inhabited place of greater size population or importance than a town or village. Used to identify where a location, such as a store or warehouse, is.

Class: The fifth level in the merchandise hierarchy. The class breaks down the merchandise hierarchy. A class can belong to one department.

Code: A unique set of numbers and/or letters that identifies a thing in the application. May apply to currencies, colors, styles, items, sizes, locations, etc.

Color Range: Defines a group of colors for a season, department or division using the colors in your Enterprise's color palette. The buyer can then select from color ranges during product development in Products. In order for a color to be available for use in a Product, it MUST be included in a color range.

Comments: Additional information added to a record.

Components: Other pieces, such as buttons and zippers.

Cost: The amount of money that must be paid to take ownership of something; expense or purchase price.

Cost by area: The cost of material for each color. The unit must be the same as the unit used in the Material requirement by Size table on the BOM tab. For example, if you entered the number of yards of fabric it would take to create a specific size on the BOM tab, you need to enter the cost per yard by Color on the Costing tab.

Country: A political state or nation or its territory.

Create WebTrack project: The product will be sent to WebTrack and a project will automatically be created. Specifically, the product and color information will populate the project number field in WebTrack and the short name will populate the project name field in WebTrack.

Created: The date a style file or project was established.

Created by: The user name of the person who entered the style file.

Currency: Coins, treasury notes, and banknotes in circulation, used as the medium of exchange.

Current price: Enter the current price of the label (not the price on the label).

Customer ID: The Style Number that the customer assigned to the product.

Cutter image: Pictorial references of the shape of the label. Browse your local drive for a cutter image. They are scanned in .gif, .jpeg, or .jpg formats

D

Date: The day, month and year an event occurs or occurred.

Department: Belongs to a group in the merchandise hierarchy and provides a way to define the areas of a group. A department is the fourth division in the merchandise hierarchy.

Description: The name or identifying note for an ID or code.

Design ID: The reference number that the supplier assigned to the product.

Division: Belongs to a company in the merchandise hierarchy and provides a way to define the major categories of merchandise at a company. A division is the second division in the merchandise hierarchy.

E

Email: The electronic mail address of the contact. a means or system for transmitting messages electronically (as between computers on a network).

End Date: The last day an element is effective in the system.

F

Field: A defined area of the label that will always contain the same information. A Field can contain Text, an Icon or a Value. Options for this table depend on the information entered on the Fields tab.

G

Grid spacing: The densitry of grid lines.A lower number selection populates the grid with many lines. Choose a lower number to increase the line density. Choose a higher number to decrease the line density.

H

Heading: A name given to a column. Depending on the column, can be user defined.

I

Icon: An image that will appear on the label. Examples would be care symbols and corporate or brand logos.

K

Keys: Criteria on which the parameter's value is assigned. Keys provide a basic level of If-Then or lookup logic to the processing of the parameter with estimated landed costs. You may define up to five keys for each parameter. Some keys, for example, Locations, require that you select from an additional drop-down list to define the key further

L

Lead Time: The time between the beginning of a process and the appearance of results.

M

Mail Dependent Parameter 1: With the exception of the Event Diary Entry mail type, represents the link to the specific track referenced in the email. For the Event Diary Entry mail type, this represents the diary text.

Mail Dependent Parameter 2: For the Event Diary Entry mail type, this represents the link to the specific track referenced in the email. Different than the other mail types, when this link is clicked, the user will be taken directly to the Show Diary view of the specific track

Mail Dependent Parameter 3: Represents the link to the Oracle Retail Design related syles, provided that the project originated in Design. For emails created in Design, this mail parameter is blank.

Mail Dependent Parameter 4: This mail parameter is currently unavailable.

Mail Dependent Parameter 5: This mail parameter is currently unavailable.

Material: The type of substance or fabric used to create the product

Material cost: The average material cost per item.

Material cost by Color per item: The cost of material for each color is entered in this table.

Material cost by Size & Color per item: The quantity, material amount, cost by area, and total material cost for each color and size displayed. The computations are based on your entries on the BOM tab and in the Material cost by Color per item table.

Material requirement by Size: The amount of material used for the individual sizes is entered in this table.

Material requirement by Size & Color: The amount of material required to create each size and color combination is computed based on your entries in the Material requirement by Size table and the colors selected on the Summary tab.

N

Name: The person who is identified as having the responsible role.

Non-seasonal: Colors displayed are not part of the color definition for the season.

O

Organization: Your company's name. This name will appear on e-mails generated by Design or WebTrack.

P

Packaging subtype: This allows the administrator to specify packaging types even further. A Subtype must be specified with a Packaging Type.

Packaging type: This is a general reference that helps to define groups of labels. Examples would be bag labels or hanging labels.

Partner: A person or entity that has an association with your organization in various areas of the procurement process. Partners can include those involved in transporting goods, escheatment, providing credit, and providing services. A partner does not provide items for resale to a retailer.

Phase: A sub section of a season.

Q

Quantity: The total number of a unit.

R

RGB: The combination of Red (R), Green (G), and Blue (B) that compose a color

S

Season: A season is a specific selling period during the year.

Start Date: The first day an element is effective in the system.

Supplier: The person or entity that provides items to a retailer.

U

Unit of Measure: Indicates how each unit is measured.

V

VAT Rate: The percentage that is applied to any value added to an item to calculate VAT.