

**Oracle® Retail Promotion Intelligence and
Promotion Planning and Optimization**

Administration Guide

Release 13.1.1

September 2009

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Preface

This guide enables you to perform the following administration tasks:

- Managing user accounts
- Managing store sets

Audience

This guide is intended for Promotion Intelligence and Promotion Planning and Optimization administrators and assumes that you are familiar with the following:

- Security (access control, permissions, and authorization).
- Retail domain metrics and terminology.
- Any company-specific policies, such as your naming conventions for merchandise and location hierarchies, naming conventions, and business practices.

Note: This guide describes the default implementation and default on screen labels. Your company may have customized the labels. In those situations, the screen labels on your user interface may not match the screen labels described in this guide.

Related Documents

For more information, the following documents are available in the Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Release 13.1.1 documentation set:

- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Release Notes*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Installation Guide*
- *Oracle Retail Promotion Intelligence User Guide*
- *Oracle Retail Promotion Planning and Optimization User Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Configuration Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Operations Guide*

- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Implementation Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Data Model*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Licensing Information*

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To contact Oracle Customer Support, access My Oracle Support at the following URL:

- <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.

Review Patch Documentation

If you are installing the application for the first time, you install either a base release (for example, 13.0) or a later patch release (for example, 13.0.2). If you are installing a software version other than the base release, be sure to read the documentation for each patch release (since the base release) before you begin installation. Patch documentation can contain critical information related to the base release and code changes that have been made since the base release.

Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site (with the exception of the Data Model which is only available with the release packaged code):

http://www.oracle.com/technology/documentation/oracle_retail.html

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

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

Managing Users

Each person using the Oracle Retail application needs a user account with specific permissions, which determine what specific tasks that person can perform. This chapter includes the following sections:

- ["Overview of User Management"](#) on page 1-1
- ["User Management Roles"](#) on page 1-2
- ["Managing User Accounts"](#) on page 1-3
- ["Working with the User Management User Interface"](#) on page 1-9
- ["Troubleshooting User Management Errors"](#) on page 1-12

Overview of User Management

The User Management utility enables you to create, modify, and inactivate user accounts. User accounts enable you to provide user-specific access control permissions.

There are two ways to manage user accounts:

- If you need to manage **multiple** user accounts all at once, use the Bulk Loader as described in the application Configuration Guide. This guide assumes that most of your user accounts have already been created, by means of the Bulk Loader.
- If you need to add or modify **one or two** user accounts, use the User Management user interface as described in this chapter.

User account permissions consists of a combination of specific *roles* (the scope of actions a user can perform) and *hierarchy levels* (the scope of business data a user can access). You can assign as many roles and hierarchy levels to a user account as necessary.

About User Account Roles

A *role* specifies the scope of actions a user is allowed to perform. Each application comes with a set of default user account roles. If you need to add user account roles or modify the actions available for user account roles, use the Bulk Loader XML files as described in the application *Configuration Guide*.

About Hierarchy Levels

A *hierarchy level* defines the scope of business data a user has permissions to access. Hierarchy level consists of the combination of the following:

- Location Hierarchy
- Merchandise Hierarchy

About Assigning Roles and Hierarchies

If you assign the top level of both the merchandise and location hierarchies to a role, the user has access to **all** hierarchy levels for that role.

If you want the user to have access to a specific merchandise-location hierarchy combination, you do so by specifying the roles and their associated hierarchies. For example, to assign permissions to submit for **only** Departments 314 and 327 for **all** locations, you would add two "submit" roles to the user account and assign a specific merchandise hierarchy to each role, as shown below:

Promote_SUBMITTER - Merchandise Department 314 and Location Chain

Promote_SUBMITTER - Merchandise Department 327 and Location Chain

User Management Roles

Along with the application user account roles, the Oracle Retail applications ship with the User Management roles that enable you to add, modify, and remove user accounts. Review the list below to determine which User Management roles to assign a user. For example, you may want to assign one user the ability to create user accounts but assign a different user the ability to assign roles to those accounts.

Important: This section describes the roles required for user management. For more information on your application user account roles, refer to the chapter *User Management* in the application's *Configuration Guide*.

When a user who has been assigned User Management roles logs on, the User Management link on the main menu opens to the User Management utility.

When a user who has not been assigned User Management privileges logs on, the User Management link will not appear on the Main Menu.

The application comes with the following User Management roles:

- **UM_USER_ADMIN** – This role allows creating new user accounts. It does not allow assigning roles.
- **UM_ROLE_ASSIGNER** – This role allows assigning roles to the existing user accounts. It does not allow creating or deleting user accounts. A person who uses this role must understand the available merchandise and location hierarchies as described in "[About Hierarchy Levels](#)" on page 1-1.
- **UM_READ_ONLY_ADMIN** – This role has privileges to view the list of users and their access permissions. This role does not allow adding, modifying, or deleting user accounts.

Managing User Accounts

The User Management user interface enables you to add, modify, or remove user accounts. It also enables you to assign or modify the hierarchy levels assigned to a user account.

This section describes how you can effectively use the User Management user interface to manage the user accounts. It includes the following tasks:

- ["Starting User Management"](#) on page 1-3
- ["Changing the Password for the Default User Account"](#) on page 1-4
- ["Changing Your Password"](#) on page 1-4
- ["Creating a User Account"](#) on page 1-4
- ["Assigning Roles and Hierarchy Levels to a User Account"](#) on page 1-5
- ["Modifying User-Related Information"](#) on page 1-7
- ["Modifying Role and Hierarchy Assignments"](#) on page 1-7
- ["Removing User Accounts"](#) on page 1-8
- ["Locking and Unlocking User Accounts"](#) on page 1-9
- ["Expiring the User Accounts"](#) on page 1-9

Starting User Management

The User Management utility is available after you have installed the application, and it is accessible via the application main menu.

Note: Without loading the hierarchies, although users can be created, no roles can be assigned.

To access the User Management utility for the first time, use the default user name and the associated password to log on to the application. This user account is a special account that provides access to all the User Management functions, and provided to you during the implementation.

After you log on for the first time, you can create accounts for the additional users who need access to the User Management utility. In addition, you might want to change the *root* user account password. For more information, see ["Changing the Password for the Default User Account"](#) on page 1-4.

To manage user accounts:

1. In the Web browser, enter the following URL to log on to the User Management utility:

`http://<your company domain name>:<portname>/plsecurity/Login.do`

2. Enter the user name and password, and click **Login**.

The **Manage Users** screen appears with a list of user accounts. For information about creating user accounts, see ["Creating a User Account"](#) on page 1-4.

To quit User Management, click the **Logout** link.

Changing the Password for the Default User Account

When you first access the User Management utility, you must use the default user account already set up for you. For security reasons, you must change the password associated to this account.

To change the password for the root account:

1. On the **Manage Users** screen, select **Change Password** from the **Action** list, and then click **Apply**.

The **Set Root Password for user: root** dialog box appears.

2. In the **Old Password** text box, enter the existing password, and in the **New Password** and **Confirm New Password** text boxes, enter the new password you want.

Reminder: Passwords are case-sensitive.

3. When the dialog box is complete, click **Done**.

You must use the new password the next time you attempt to log on using the root account.

Changing Your Password

Once you log in to the application, you can change your password at any given time

To change your password:

1. On the **Manage Users** screen, select **Change Password** from the **Action** list, and then click **Apply**.

The **Set Password for user: username** dialog box appears.

2. Complete the **Set Password for user: username** dialog box as follows:

Important: All passwords are case-sensitive. Make sure that the Caps Lock key is not selected.

- a. In the **Old Password** text box, type your existing password.
 - b. In the **New Password** text box, type your new password. You can use any combination of letters, numbers, and symbols, up to 50 characters.
 - c. In the **Confirm New Password** text box, type your new password again.
3. Click **Done**. Your password is changed to the new password. You must use this password the next time you want to log into the application.

Creating a User Account

You must create a user account for each user who needs access to the application. For each user account, you must then assign one or more roles that determine what products and features a user can access.

There are two ways to create user accounts:

- If you need to create multiple user accounts all at once, use the User Management Bulk Loader utility. For more information, see the section *Understanding the User Management Bulk Loader Utility* in the *Configuration Guide*.
- If you need to add or modify one or two user accounts, use the User Management user interface as described in this section.

To create a user account:

1. On the **Manage Users** screen, select **Add New User** from the **Action** list, and then click **Apply**.

The **Add New User** dialog box appears.

2. Complete the **Add New User** dialog box fields, as shown in the following table:

Table 1–1 User Account Elements

Field	Description
User Name	Required. The user name must be unique for each user. The user name is case-sensitive and can be up to 25 characters (letters, numbers, and symbols) long. For example, Buyer, buyer, and BUYER are all considered to be unique.
Password	Required. The password is associated with the user name, and both are required to log on. The password is case-sensitive and can be up to 25 characters (letters, numbers, and symbols) long. For example, Secret, secret, and SECRET are all considered to be unique.
First Name	Required, up to 50 characters. Helps you to identify the person assigned to a user name. For example, if your user names are generic labels (such as WomensBuyer001 and MensBuyer300), this information enables you to identify which employee is assigned to a specific user name.
Last Name	Required, up to 50 characters. Helps you to identify the person assigned to a user name.
MI	Optional, 1 character. Helps you to identify the person assigned to a user name.
Employee ID	Optional, up to 10 numbers. The employee ID is available for your internal use.
Title	Optional, up to 50 characters. Helps you to identify the person assigned to a user name.
Email	Optional. The e-mail address associated with the user account.

3. When the fields are complete, click **Done**.

The Manage Users screen appears with the user name and related identifiers added.

Now that you have created the user account, the next step is to assign the appropriate permissions as described in "[Assigning Roles and Hierarchy Levels to a User Account](#)" on page 1-5.

Assigning Roles and Hierarchy Levels to a User Account

Each user account must have one or more roles associated with the applicable hierarchies. For information about roles and hierarchies, see "[Overview of User Management](#)" on page 1-1.

Note: You can only add user roles one at a time from the graphical user interface. For instructions on how to add multiple roles all at once, see information about the Bulk Loader as described in the *Configuration Guide*.

To assign roles to a user account:

1. From the **Manage Users** screen, select the user account to which you want to assign roles.
2. From the **Action** list, select **User Roles**, and then click **Apply**.
The **Role Assignment for username** screen appears.
3. From the **Action** list, select **Add Role Assignment**, and then click **Apply**.
The **Add Role Assignment** dialog box appears.
4. From the **Role** list box, select the role you want to assign to this user account. For details on the default roles supplied, see "[User Management Roles](#)" on page 1-2. Note that your implementation may have additional customized roles as well.
5. For any business-related role (any role except for User Management roles) specify the hierarchy levels you want this user to be able to access.

To navigate down the hierarchy, hover your mouse pointer over the right arrow in the hierarchy. Keep navigating until the target level appears, and then click it.

Figure 1–1 Edit/Role Assignment Screen

- To navigate down a hierarchy, use the right arrow.
 - To navigate up a hierarchy, use the left arrow.
6. After you have selected the role and any applicable hierarchy levels, click **Done**.
The **Role Assignment for: <username>** screen updates with the role and hierarchy levels added.
If an error message appears instead, see "[Troubleshooting User Management Errors](#)" on page 1-12.
 7. Repeat steps 3 through 6 to add as many roles as necessary. When you are finished adding roles, click **Done** to return to the Manage Users screen.

Note: If you assign different roles within the same hierarchy levels, the role with the most privileges takes precedence. For example, if you assign a read-only role **and** a power user role for the same hierarchy, the power user role for that hierarchy is used when the user logs on.

Modifying User-Related Information

Modifying user-related information involves changing the user name, password, first name, and last name. Typically, you would modify a user account in a situation where the required activities remain the same, but the employee has been reassigned to other tasks.

If you want to change the **permissions** associated with a user account, see "[Modifying Role and Hierarchy Assignments](#)" on page 1-7.

Note: You can only modify user accounts one at a time from the graphical user interface. For instructions on how to modify multiple accounts all at once, see information about the Bulk Loader as described in the *Configuration Guide*.

To modify a user account:

1. On the **Manage Users** screen, select the user account you want.
2. From the **Action** list, select **Edit Existing User**, and click **Apply**.
The **Edit User** screen appears.
3. Change the field values as necessary.
4. Click **Done**.

The Manage Users screen appears with the updated information. Changes to the user account are effective the next time the user attempts to log on.

Modifying Role and Hierarchy Assignments

For each user account, you can do the following:

- Add or remove roles
- Change the hierarchy levels associated with a specific role

Note: You can only modify roles and roles assignments one at a time from the graphical user interface. For instructions on how to add multiple roles all at once, see information about the Bulk Loader as described in the *Configuration Guide*.

To modify a role:

1. From the **Manage Users** screen, select the user account whose roles or hierarchy levels you want to modify.
2. From the **Action** list, select **User Roles**, and click **Apply**.
The **Role Assignment for: <username>** screen appears.
3. Do any of the following:

To	Do this
Assign a role	<ol style="list-style-type: none"> 1. From the Action list, select Add Role Assignment, and then click Apply. For a list of available roles, see "User Management Roles" on page 1-2. 2. On the Add Role Assignment dialog box, select a role and its associated hierarchy levels, and click Done.
Change the hierarchy levels	<ol style="list-style-type: none"> 1. Select the roles for which you want to change the hierarchy levels. For information about hierarchy levels, see "About Hierarchy Levels" on page 1-1. 2. From the Action list, select Edit Role Assignment, and then click Apply. 3. On the Edit Role Assignment dialog box, select the new hierarchy levels. (Alternatively, you could select a new role and keep the hierarchy levels.)
Remove a role	<ol style="list-style-type: none"> 1. Select the roles you want to remove. 2. From the Action list, select Delete Role Assignment, and then click Apply. The role is removed immediately. <p>Caution: There is no undo, and there is no confirmation dialog box.</p>

4. When the screen reflects the changes, click **Done**.

The change take effect the next time the user logs on.

Removing User Accounts

Removing a user account enables you to remove the user from the list. You may want to remove a user account when the assigned user moves to a different position or no longer needs access. The removed users can not be re-activated.

When you remove a user account, that account is preserved in the database for reports and historical data. Use caution when removing a user account.

Important: Removing a user account is **permanent**. There is no undo function. If you decide later that you need this account, you must create a new one.

If you simply want to remove access to a product or to an area of the hierarchies for a specific user account, see "[Modifying Role and Hierarchy Assignments](#)" on page 1-7. If you want to reassign a user account to another person, see "[Modifying User-Related Information](#)" on page 1-7.

To remove a user account:

1. On the **Manage Users** screen, select the user accounts you want to remove.
2. From the **Action** list, select **Remove User**, and then click **Apply**.
A confirmation dialog box appears.
3. Click **Yes** to remove the user account.

The user account is removed from the list. If anyone attempts to use this account, the login will fail.

Locking and Unlocking User Accounts

Use the *Lock and Unlock Accounts* features to control user access to the application. Locking an user account restricts access to the software temporarily, and the account can be unlocked with all the access privileges assigned to the user restored.

To lock a user account:

1. On the **Manage User** screen, click the check box next to the user account you want.
2. From the **Action** list, select **Lock Account**, and then click **Apply**.

A confirmation dialog box appears.

3. Click **Yes**.

To unlock a user account:

1. On the **Manage User** screen, click the check box next to a locked user account you want.
2. From the **Action** list, select **Unlock Account**, and then click **Apply**.

A confirmation dialog box appears.

3. Click **Yes**. The Set Unlock Password for users dialog box appears.
4. Set the new password and click **Done**.

Expiring the User Accounts

Use the *Expire User Account* feature to force the user to reset the password associated with the user account. The expired user account can be re-activated by the user by resetting the password associated with the user account.

To expire the user account:

1. On the **Manage User** screen, click the check box next to the user account you want.
2. From the **Action** list, select **Expire User Account**, and then click **Apply**.
A confirmation dialog box appears.
3. Click **OK** to expire the password for the user account.

Working with the User Management User Interface

The User Management user interface enables you to work with the user accounts you have created as follows:

- ["Sorting Columns"](#) on page 1-10
- ["Rearranging Columns"](#) on page 1-10
- ["Hiding Columns"](#) on page 1-11
- ["Printing and Exporting User Account Information"](#) on page 1-11

Sorting Columns

You can sort the data displayed on the following User Management screens:

- Manage Users
- Role Assignments for username

To sort the user and user roles data displays:

1. From the **Action** list, select **Sort Table**, and then click **Apply**.
The **Customize Table** dialog box appears.
2. On the **Sort Table** tab, enter a sort criteria in the following manner:
 - a. Select a column from the first list box.
This column becomes the primary sort column for the data display.
 - b. For that column, select a sort order, either ascending order (A - Z or 1 - 10) or descending order (Z - A or 10 - 1).
 - c. If you want to sort the data by additional columns, select a column and sort order for the remaining two list boxes.

Note: To remove one or more sort criteria, click ***Select*** from the list boxes.

3. When the list boxes and sort order reflect the way you want the data to be sorted, click **Done**.

The Customize Table dialog box closes, and the data display is updated to the sort order you selected. The sort order remains in effect until you next change it.

Rearranging Columns

You can rearrange the columns on the following User Management screens:

- Manage Users
- Role Assignments for username

To rearrange the columns:

1. From the **Action** list, click **Modify Columns**, and then click **Apply**.
The **Customize Table** dialog box appears.
2. On the **Change Columns** tab, in the **Visible Columns** list box, select the column whose position you want to change.
3. Click the up or down arrow until the column is in its target location.
4. Repeat steps 2 and 3 as many times as necessary.
5. When the **Customize Table** dialog box reflects your settings, click **Done**.

The Customize Table dialog box closes, and the screen updates with your modifications.

Hiding Columns

You can hide columns on the following User Management screens:

- Manage Users
- Role Assignments for username

To hide (or show) columns:

1. From the **Action** list, click **Modify Columns**, and then click **Apply**.

The **Customize Table** dialog box appears.

2. On the **Change Columns** tab, do one of the following:

- To hide a column:

In the **Visible Columns** list box, select the column you want to hide.

Click the left arrow to move the column to the **Hidden Columns** list box.

- To show a column:

In the **Hidden Columns** list box, select the column whose position you want to change.

Click the right arrow to move the column to the **Visible Columns** list box.

3. Repeat step 2 as many times as necessary.
4. When the **Customize Table** dialog box reflects your settings, click **Done**.
The **Customize Table** dialog box closes, and the screen updates with your modifications.

Printing and Exporting User Account Information

When you print or export information:

- Only **visible** columns are printed or exported.

For example, if you chose to hide some columns (see ["Hiding Columns"](#) on page 1-11), the data in those columns is not included in the print out or the Microsoft Excel file. (Likewise, data that is filtered out or hidden in a collapsed row is exported or printed.)

- Information is printed or exported in the current sort order. (To change the sort order, see ["Sorting Columns"](#) on page 1-10).

To print or export user account information:

1. From the **Action** list on the screen you want, select **Print or Export**, and then click **Apply**.

The Print or Export dialog box appears with a reminder that only the visible data will be printed or exported. The dialog box also indicate the number of rows and the columns, which helps you to estimate how long the print or export process will take.

2. Do one of the following:

To	Do This
Print the user data on the screen (not the screen itself)	Click Print and complete the resulting print dialog box as you normally would.

To	Do This
Export the data to a Microsoft Excel spreadsheet	<ol style="list-style-type: none"> 1. Click Send to Excel. 2. On the resulting Save As dialog box, enter a file name and click Save. An Export Complete message appears along with the path and file name of the Excel file, and the Excel file opens.

Troubleshooting User Management Errors

This section enables you to troubleshoot the following user account management errors:

- ["Unable To Perform Request: System Error"](#) on page 1-12
- ["User Cannot Log In"](#) on page 1-12

Unable To Perform Request: System Error

The following error message can occur in a variety of circumstances:

Unable to perform request due to system error

Solution

Perform the following:

- Verify that the network is not having problems.
- Verify that the User Management database is available.

User Cannot Log In

A user reports that their username and password combination is no longer working.

Solution

Log in problems are usually due to case-sensitivity issues. To solve this problem, perform the following:

- Make sure that the user has not selected the Caps Lock key.
- If you have recently changed their password or username, it is possible that Internet Explorer is storing the former password. This can occur when the only change in the user name or password is case.

Managing Stores

The Store Set Management Utility enables you to view and change the store sets used in the application. It also enables you to modify the subsets in each store set and add more stores in a subset. This chapter describes the tasks that you can perform to manage the store sets and subsets. It includes the following sections:

- ["Understanding Store Sets and Subsets" on page 2-1](#)
- ["Accessing the Store Set Management Utility" on page 2-1](#)
- ["Managing Store Sets" on page 2-3](#)
- ["Managing Subsets" on page 2-8](#)

Understanding Store Sets and Subsets

A store set is a set of stores, grouped into one or more subsets, that a user can create and use in the application by selecting attributes. A subset contains a group of stores that share a characteristic, such as region, climate, fashion segment, ad designation, or a user-specific attribute.

Store sets are classified in the following manner:

- **Dynamic** store sets are created and maintained by using filters. They are automatically updated whenever the Stores Master records are loaded into the application, as the filters are re-applied or as the attributes change. You can change the store set type from Dynamic to Static to prevent automatic updates of the store set. If you manually assign a store to a store set, the store type is automatically set to Static.
- **Static** store sets can be created manually or by using filters. They are not automatically updated; they can only be changed by deliberate user action.

Note: You cannot change a store set type from Static to Dynamic.

Accessing the Store Set Management Utility

You can access the Store Set Management utility from the application Main Menu. Ensure that your user account includes the appropriate roles that are necessary to access the Store Set Management utility.

To access the Store Set Management utility:

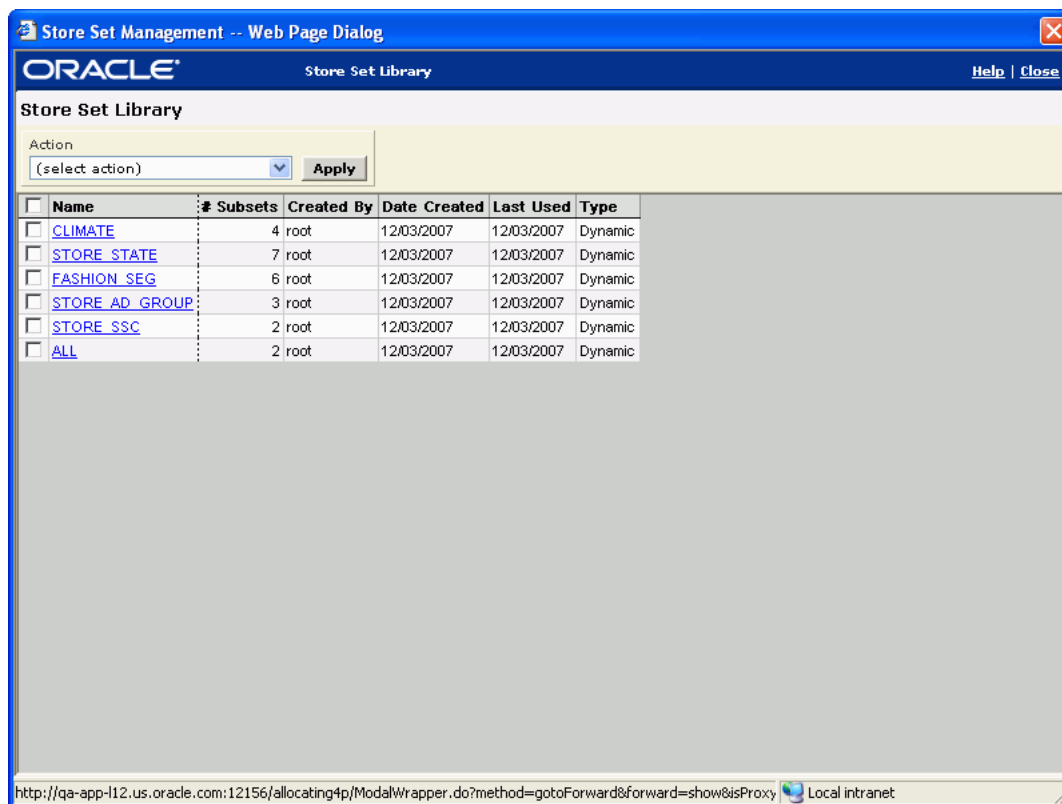
- In the Web browser, enter the following URL to log on to the Store Set Management utility:

```
http://<your company>
domain name>:<portname>/store/StoreSetLibrary.do?method=show
```

Enter the user name and password, and click **Login**.

The **Store Set Library** screen appears, with a list of the store sets you can access. This library provides a point of access to all the actions on the store sets. The following figure shows the Store Set Library screen:

Figure 2–1 Store Set Library Screen



Store Set Library Grid

The following table describes the fields that appear on the Store Set Library grid:

Table 2–1 Fields that appear on the Store Set Library Grid

Field	Description
Name	Name of the store set.
# Subsets	Number of subsets assigned to the store set.
Created By	User ID of the user who created the store set.
Date Created	Date when the user created the store set.
Last Used	Date when the store set was last accessed by any user.
Type	Type of the store set (Static or Dynamic).

Managing Store Sets

The Store Set Management user interface enables you to add, modify, or remove store sets, as also the associated stores or subsets. It also enables you to manage the subsets in a store set.

This section describes how you can effectively use the Store Set Management user interface to manage store sets. It includes the following tasks:

- ["Creating a New Store Set" on page 2-3](#)
- ["Copying the Selected Store Set" on page 2-3](#)
- ["Renaming the Selected Store Sets" on page 2-4](#)
- ["Merging the Selected Store Sets" on page 2-4](#)
- ["Removing the Selected Store Sets" on page 2-5](#)
- ["Viewing Other Store Sets" on page 2-5](#)
- ["Printing and Exporting the Store Set Information" on page 2-6](#)
- ["Sorting the User Account Information" on page 2-7](#)
- ["Customizing the Columns" on page 2-8](#)

Note: As a common user, the functionality of using **Store Set Management** is limited. You can only view the store set information.

Creating a New Store Set

Use the *New Store Set* feature (in the Action list on the Store Set Library screen) to create new store sets.

To create a new store set:

- On the Store Set Library screen, select **New Store Set** in the **Action** list, and then click **Apply**.

A new store set named *NewStoreSet* is created and added to the **Store Set Library**.

For information on renaming the store set, see ["Renaming the Selected Store Sets" on page 2-4](#).

Copying the Selected Store Set

Use the *Copy Selected Store Set* (in the Action list on the Store Set Library screen) to copy a store set and create a new store set that includes the same attributes, subsets, and stores assigned to the subsets.

To copy a selected store set:

1. On the **Store Set Library** screen, select the check box next to the store set you want.
2. From the **Action** list, select **Copy Selected Store Set**, and then click **Apply**.

Note: You can copy only one store set at a time.

A new store set named *Copy of store_set_name* is created and added to the **Store Set Library** screen.

For information on renaming the new store set, see ["Renaming the Selected Store Sets" on page 2-4](#). Within the new store set, you can add, merge, remove, or rename the subsets based on your need. You can also add or move stores between the subsets. For more information, see ["Managing Subsets" on page 2-8](#).

Renaming the Selected Store Sets

Use the *Rename Selected Store Set* feature (in the Action list on the Store Set Library screen) to rename the store sets you want. You can rename more than one store set at a time.

To rename a selected store set:

1. On the **Store Set Library** screen, select the check box next to the store set you want.
2. From the **Action** list, select **Rename Selected Store Set**, and click **Apply**.
The **Rename Store Set** screen appears.
3. Enter the new name for the store set, and click **Rename**.

Note: Valid characters for naming a store set or a subset are letters, digits, a space, or "_".

Merging the Selected Store Sets

Use the *Merge Selected Store Sets* feature (in the Action list on the Store Set Library screen) to merge the subsets that belong to each store sets.

You can merge only two store sets at a time. The merged store sets continue to exist independently.

Note: Merged stores sets are Static store sets.

To merge the two existing store sets:

1. On the **Store Set Library** screen, select the check boxes next to the two store sets you want to merge.
2. From the **Action** list, select **Merge Selected Store Sets**, and click **Apply**.

A new store set is created and it appears on the **Store Set Library** screen with the name *Store_Set_Name_1-Store_Set_Name_2*.

To merge another store set with the merged store sets, repeat steps 2 and 3.

When you merge two store sets, a new store set is created that includes all possible combinations of the subsets, and one remaining subset (includes the stores that did not belong to any of the possible combinations of the subsets).

Example 2-1 Merge Store Sets

Consider that two store sets, *Climate* and *State*, exist in the Store Set Management utility. The *Climate* store set includes the following subsets (4) that group stores according to the weather:

- Cold Winter
- Mild Winter

- Regular Winter
- Remaining Subset

The *State* store set includes the following subsets (4) that group the stores based on the states where the stores are located:

- S1
- S2
- S3
- Remaining Subset

When you merge these two store sets, a new store set, *Climate-State*, is created. It includes the following subsets (10):

- Cold Winter-S1
- Cold Winter-S2
- Cold Winter-S3
- Mild Winter-S1
- Mild Winter-S2
- Mild Winter-S3
- Regular Winter-S1
- Regular Winter-S2
- Regular Winter-S3
- Remaining Subset

Removing the Selected Store Sets

Use the *Remove Selected Store Sets* feature (in the Action list on the Store Set Library screen) to remove the store sets from the application.

To remove the selected store set:

1. On the **Store Set Library** screen, select the check box next to the store set you want.
2. From the **Action** list, select **Remove Selected Store Set**, and click **Apply**.

Note: Once a store set is removed, the store set cannot be retrieved from the database. The store sets created by a user can be deleted or removed from the application only by that user.

Viewing Other Store Sets

Use the *View Other Store Sets* feature (in the Action list on the Store Set Library screen) to view the store sets created by other users in the application. It also enables you to search and add a copy of the other store sets for your user account.

Note: You can view all the store sets in the database. However, you cannot delete or modify any of the store sets created by the other users.

To view the other store sets:

1. On the **Store Set Library** screen, select **View Other Store Sets** in the **Action** list, and click **Apply**.

The **View Other Store Sets** screen appears.

2. Enter the user name in the **User Name** field.

Or

Enter the store set name in the **Store Set Name** field.

Note: You can enter the user name and the store set name to find the store set.

3. Click **Find**.
4. The store set(s) that match your search criteria are displayed in the list.

The store set(s) appear in the library with the name of the user who created the store set, the store set ID, the date when it was created, the date when it was last used, and the type of store set.

You can add this store set in the **Store Set Library** by clicking on **Add Store Sets** button on the top panel. The following figure shows the **View Other Store Sets** window with the search results.

Figure 2–2 View Other Store Sets Screen

ORACLE Store Set Library > View Other Store Sets [Help](#)

View Other Store Sets [Add Store Sets](#) [Cancel](#)

User Name:

Store Set Name: [Find](#)

Choose one or two store sets to include in your store base:

<input type="checkbox"/>	id	Name	# Subsets	Created By	Date Created	Last Used	Type
<input type="checkbox"/>	100	CLIMATE	4	root	20/12/2006	20/12/2006	Dynamic

To add the store set to the Store Set Library:

1. Select the check box next to the store set that you want to add to your **Store Set Library**.
2. Click **Add Store Sets** on the top panel of the screen.

Printing and Exporting the Store Set Information

Use the *Print or Export* feature (in the Action list on the Store Set Library screen) to print or export the information that appears on the Store Set Library grid. When you print or export the information:

- Only the visible columns are printed or exported. For example, if you choose to hide some columns (see ["Customizing the Columns" on page 2-8](#)), the data in those columns are excluded in the output.
- The information is printed or exported in the current sort order. (To change the sort order, see ["Sorting the User Account Information" on page 2-7](#).)

Note: You can export the information in the Microsoft Excel (.xls) format.

To print or export the store set information:

1. On the **Store Set Library** screen, from the **Action** list, select **Print or Export**, and then click **Apply**.

The **Print or Export** dialog box appears with a reminder that only the visible data (not the data in the hidden columns) will be printed or exported. The dialog box also includes a count of the rows and the columns. This can help you decide how long the print or export process will take.

2. Do one of the following:

Table 2–2 Printing and Exporting User Account Information

To	Do This
Print the user data on the screen (not the screen itself)	<ol style="list-style-type: none"> 1. Click Print. 2. Enter the appropriate print parameters in the Print dialog box that appears.
Export the data to a Microsoft Excel spreadsheet	<ol style="list-style-type: none"> 1. Click Send to Excel. The Save As dialog box appears. 2. Type a file name, and click Save. An Export Complete message appears along with the path and file name of the file, and the Microsoft Excel file opens.

Sorting the User Account Information

Use the *Sort Table* feature (in the Action list on the Store Set Library screen) to sort the store set information that appears on the Store Set Library grid.

To sort the store set information:

1. From the **Action** list, select **Customize Table**, and click **Apply**.

The **Customize Table** dialog box appears.

2. On the **Sort Table** tab, enter a sort criteria in the following manner:
 - a. Select a column from the first list box. This column becomes the primary sort column for the data display.
 - b. For that column, select a sort order, either ascending order (A - Z or 1 - 10) or a descending order (Z - A or 10 - 1).
 - c. If you want to sort the data by additional columns, select a column and sort order for the remaining two list boxes.

Note: To remove one or more sort criteria, click ***Select*** from the list boxes.

3. When the list boxes and sort order reflect the way you want the data to be sorted, click **Done**.

Customizing the Columns

Use the *Modify Columns* feature (in the Action list on the Store Set Library screen) to customize (rearrange or hide) the columns that appear on the Store Set Library grid.

To customize the columns:

1. From the **Action** list, select **Customize Table**, and click **Apply**.

The **Customize Table** dialog box appears.

2. On the **Change Columns** tab, do one of the following:

Table 2–3 Customizing Columns

To	Do this
Hide a column	<ol style="list-style-type: none"> 1. In the Visible Columns list, select the column that you want to hide. 2. Click the left arrow to move the column to the Hidden Columns list.
Show a hidden column	<ol style="list-style-type: none"> 1. In the Hidden Columns list, select the column that you want to make visible. 2. Click the right arrow to move the column to the Visible Columns list.
Change the column order	<ol style="list-style-type: none"> 1. In the Visible Columns list, select the column whose position you want to change. 2. Click the up or down arrow until the column is in its target location.

3. When the **Customize Table** dialog box reflects your settings, click **Done**.

Managing Subsets

A subset is a group of stores, grouped because of a similar attribute or characteristic. There can be many stores in a subset and multiple subsets assigned to a store set.

This section describes how you can effectively manage subsets, using the features available in the following tabs:

- ["Subsets Tab" on page 2-8](#)
- ["Filters Tab" on page 2-13](#)
- ["Stores Tab" on page 2-15](#)

Subsets Tab

The Subsets tab lists all the subsets that belong to the store set. It enables you to add, rename, combine, and remove the subsets.

On the Subsets tab, you can perform the following tasks:

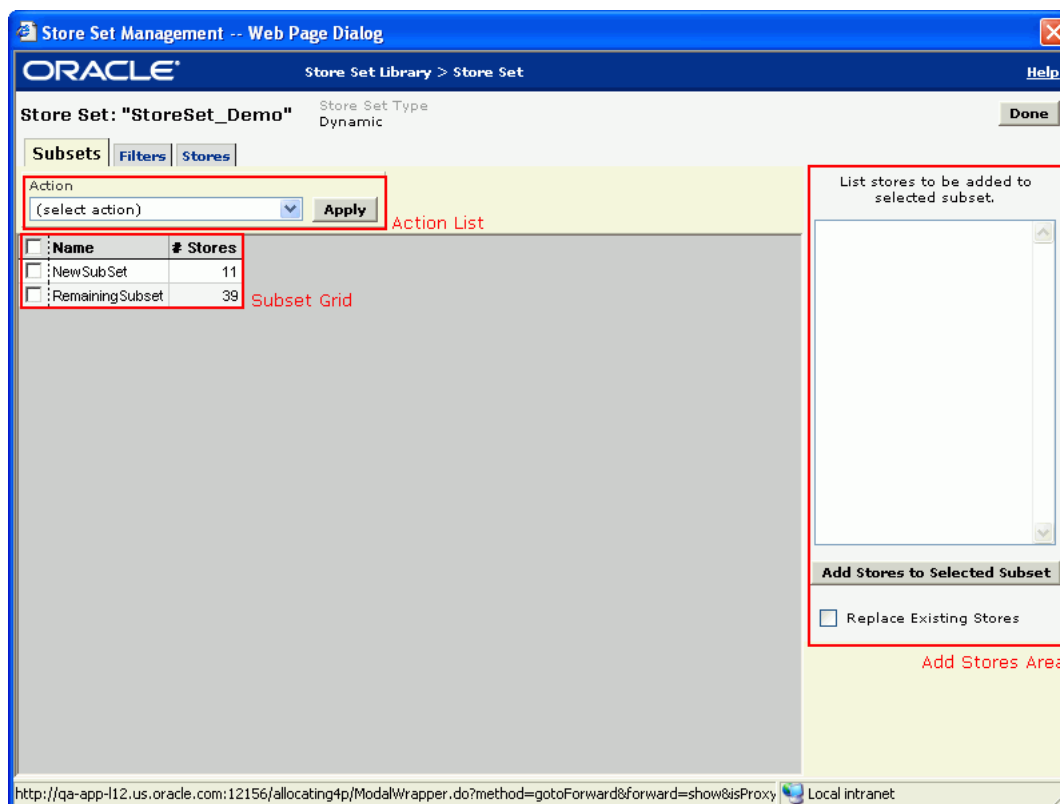
- ["Creating a New Subset" on page 2-10](#)
- ["Renaming the Selected Subsets" on page 2-10](#)
- ["Combining the Selected Subsets" on page 2-10](#)
- ["Removing the Selected Subsets" on page 2-11](#)
- ["Changing the Store Set Type to Static" on page 2-12](#)

- "Adding Specific Stores to the Subset" on page 2-12
- "Customizing the Table" on page 2-12
- "Printing or Exporting Information" on page 2-12

Subsets Tab Screen

The following figure shows the Subsets tab in the Store Set screen:

Figure 2–3 Subsets Tab in the Store Set screen



Subsets Tab Components

The following table describes the components in the Subsets tab:

Table 2–4 Subsets Tab Components

Component	Description
Action list	<p>The Action list includes the options that enable you to perform the following administrative tasks:</p> <ul style="list-style-type: none"> ■ "Creating a New Subset" on page 2-10 ■ "Renaming the Selected Subsets" on page 2-10 ■ "Combining the Selected Subsets" on page 2-10 ■ "Removing the Selected Subsets" on page 2-11 ■ "Changing the Store Set Type to Static" on page 2-12 ■ "Customizing the Table" on page 2-12 ■ "Printing or Exporting Information" on page 2-12

Table 2–4 (Cont.) Subsets Tab Components

Component	Description
Subset Grid	The Subset grid displays the information on the subsets included in the store set.
Add Stores Area	The Add Stores area enables you to add individual stores to a specific subset. For more information, see "Adding Specific Stores to the Subset" on page 2-12.

Creating a New Subset

Use the *New Subset* feature (in the Action list on the Subsets tab) to create new subsets.

To create a new subset:

1. On the **Store Set Library** screen, select the store set in which you want to add a new subset.

The **Store Set** screen appears.

2. On the **Subsets** tab, select **New Subset** in the **Action** list, and click **Apply**.

The new subset appears in the Subset grid with the name *New SubSet*. If you have already created a subset with that name, the new subset gets named as *New SubSet1*. You can change the name of the subset to an appropriate name. For more information on how to change the name of the subset, see ["Renaming the Selected Subsets" on page 2-10.](#)

Renaming the Selected Subsets

Use the *Rename Selected Subsets* feature (in the Action list on the Subsets tab) to rename the subsets you want.

To rename a selected subset:

1. On the **Store Set Library** screen, select the store set that contains the subset you want.

The **Store Set** screen appears.

2. On the **Subsets** tab, select the subset you want.

3. From the **Action** list, select **Rename Selected Subsets**, and click **Apply**.

The **Rename Subsets** window appears.

4. Enter the new subset name in the **Rename Subset to** field, and click **Rename subset**.

Combining the Selected Subsets

Use the *Combine Selected Subsets* feature (in the Action list on the Subsets tab) to include all the stores, present in two different subsets, into a new subset and replace the two existing subsets.

Note: You can combine only two subsets at a time.

To combine the selected subsets:

1. On the **Store Set Library** screen, select the store set that contains the subsets you want to combine.

The **Store Set** screen appears.

2. On the **Subsets** tab, select the two subsets that you want to combine by selecting the check box next to each subset.
3. Click **Apply**.

A confirmation message appears.

Note: When you combine two subsets, the store set is automatically set to Static.

4. Click **OK**.

The combined subset appears on the Subsets grid, with the a name that is a combination of the names of the two subsets, and includes the stores that were attached to the subsets. It does not include the previous filter condition used to include the stores in the subsets.

Example 2-2 Combining Subsets

Consider that the *State* store set includes the following subsets (4) that group the stores based on the states where the stores are located:

- S1 (includes 4 stores)
- S2 (includes 6 stores)
- S3 (includes 2 stores)
- Remaining Subset

When you combine the *S1* and *S2* subsets, a new *S1-S2* subset is created that replaces the two subsets, and includes 10 stores.

Removing the Selected Subsets

Use the *Remove Selected Subsets* feature (in the Action list on the Subsets tab) to remove subsets from a store set.

To remove selected subsets from a store set:

1. On the **Store Set Library** screen, select the store set that contains the subset you want.

The **Store Set** screen appears.

2. On the **Subsets** tab, select the subset that you want to remove, and then click **Apply**.

A confirmation message appears.

3. Click **OK**.

When you remove a subset, stores in the subset get added to the *Remaining Subset* subset.

To assign the stores to another subset,

- Apply filter conditions (see "[Adding Stores to the Subsets using Filters](#)" on [page 2-14](#))

Or

Add the stores to a subset manually (see ["Adding Specific Stores to the Subset" on page 2-12](#)).

Note: Once removed, you cannot retrieve any information on the subset.

Changing the Store Set Type to Static

Use the *Change Store Set Type to Static* feature (in the Action list on the Subsets tab) to change the store set type to Static and prevent automatic updates to the store sets (by means of the filters).

To change the store set type to Static:

1. On the **Store Set Library** screen, select the store set you want.
The **Store Set** screen appears.
2. On the **Subsets** tab, select **Change Store Type to Static** in the **Action** list, and click **Apply**.
A confirmation message appears.
3. Click **OK**.

Adding Specific Stores to the Subset

Use the *Add Stores to Selected Subset* button (on the Subsets tab) to add individual stores to the selected subset. You can also replace the existing stores in a subset with the stores you want, using the *Replace Existing Stores* check box.

To add or replace the stores in a store subset:

1. On the **Store Set Library** screen, select the store set you want.
The **Store Set** screen appears.
2. On the **Subsets** tab, select the check box next to the subset you want.
3. In the text box (**Add Stores** area) to the right, enter the store IDs of the stores.
See [Figure 2-3, "Subsets Tab in the Store Set screen"](#)
4. Click **Add Stores to Selected Subset**.

Select the **Replace Existing Stores** check box to move the stores in the store set to *Remaining Subset*, and add the store (s) you listed in the text area to the store set.

Customizing the Table

You can change the display of the subsets listed within the **Subsets** tab by using the **Customize Table** option. For more information, see ["Sorting the User Account Information" on page 2-7](#) and ["Customizing the Columns" on page 2-8](#).

Printing or Exporting Information

You can print the information displayed on the screen or export the information to a Microsoft Excel spreadsheet. For information on how to print or export data, see ["Printing and Exporting the Store Set Information" on page 2-6](#).

Filters Tab

The Filters tab lists the filters that are used to include the stores in each subset. It enables you to add stores to a subset for a specific set of conditions, and also move the stores between the subsets by rearranging the filter conditions.

On the Filters tab, you can perform the following tasks:

- ["Adding Stores to the Subsets using Filters" on page 2-14](#)
- ["Rearranging Stores in the Subsets" on page 2-14](#)

Note: To effectively use the Filter feature, you must have at least two subsets (other than the remaining subset) in a store set.

Filters Tab Screen

The following figure shows the Filters tab in the Store Set screen:

Figure 2–4 *Filters Tab in the Store Set Screen*

If this is true:		Place store in this group	# Stores
If State =	S1 (select filter) Add Clear	NewSubSet	11
Otherwise	Remaining stores will be placed in this group:		39

Filter Grid

Filters Tab Components

The following table describes the components in the Filters tab:

Table 2–5 *Filters Tab Components*

Component	Description
Apply Filters	Click the Apply Filters button to apply the filter conditions specified for the subsets. For more information, see "Adding Stores to the Subsets using Filters" on page 2-14 .

Table 2–5 (Cont.) Filters Tab Components

Component	Description
Reorder Subsets	Click the Reorder Subsets button to rearrange the stores in each subsets by modifying the sequence in which the conditions are specified. For more information, see "Rearranging Stores in the Subsets" on page 2-14.
Filter Grid	The Filter grid displays the filter conditions used for the subsets. For more information on working with the Filters grid, see "Adding Stores to the Subsets using Filters" on page 2-14 and "Rearranging Stores in the Subsets" on page 2-14.

Adding Stores to the Subsets using Filters

Use the *Apply Filters* button (on the Filters tab) to add stores to the subsets based on a sequence of filter conditions.

To add stores to a subset by specifying a filter:

1. On the **Store Set Library** screen, select the store set you want.
The **Store Set** screen appears.
2. On the **Filters** tab, under **If this is true:**, select a filter option you want to use, and click **Add**.
The **Store Set** screen updates with the filter condition included in the **If this is true:** column.
3. Enter an appropriate value for the filter condition.
To add more filter conditions to each subset, repeat steps 3 – 4.
4. Click **Apply Filters**.
The **Store Set** screen updates with the number of stores in the **# Stores** column for each subset.

Note: To ensure that you see the correct number of stores for a specific filter, you must click the Apply Filters button each time you modify the value of filter condition.

To remove a filter condition:

1. Under **If this is true:**, select the check box next to the filter condition you want to remove from the subset.
2. Click **Clear**.

The Store Set screen updates with the filter condition excluded from the subset.

Rearranging Stores in the Subsets

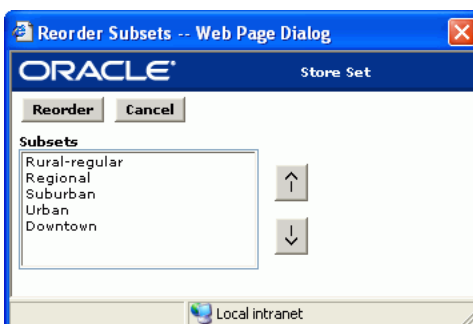
Use the **Reorder Subsets** button (on the Filters tab) to rearrange the store groupings in the subsets by modifying the sequence of filter conditions.

To rearrange the stores assigned to each subset:

1. On the **Store Set Library** screen, select the store set you want.
The **Store Set** screen appears.
2. On the **Filters** tab, click **Reorder Subsets**.

The **Reorder Subsets** screen appears.

Figure 2–5 Reorder Subsets Screen



3. In the **Subsets** list, select the subset you want to move, and use the Up or Down arrows to change its position.
4. Click **Reorder**.

The Store Set screen updates with the revised store count in each subset.

Stores Tab

The Stores tab lists all the stores that belong to the store set. It enables you to select the stores, and move the stores to the subsets you want.

On the Stores tab, you can perform the following tasks:

- ["Finding Stores" on page 2-17](#)
- ["Moving Stores to a Different Subset" on page 2-17](#)

Stores Tab Screen

The following figure shows the Stores tab in the Store Set screen:

Figure 2–6 Stores Tab in the Store Set Screen

Store Set Management -- Web Page Dialog

ORACLE® Store Set Library > Store Set Help

Store Set: StoreSet_Demo Store Set Type: Dynamic Filtered: No Done

Subsets Filters Stores

Subset: All State: All Climate: All Region: All Ad Desg: All Division: All Show Move List: (select subset) Move

Action: (select action) Apply Action List Filter Lists Move List

Subset	Store	City	State	Postal Code	Climate	Region	Ad Desg	Fash Seg	Open Date	Close Date	New Str	SSC
<input type="checkbox"/> NewSub Set	340	City 34	S1	Zip Code 340	Regular Winter	112	1	Suburban	24/10/1995			2
<input type="checkbox"/> NewSub Set	156	City 14	S1	Zip Code 156	Regular Winter	212	2	Urban	01/06/1984			2
<input type="checkbox"/> NewSub Set	392	City 47	S1	Zip Code 392	Regular Winter	112	1	Suburban	19/05/1999			2
<input type="checkbox"/> NewSub Set	324	City 33	S1	Zip Code 324	Regular Winter	112	1	Suburban	05/02/1995			2
<input type="checkbox"/> NewSub Set	319	City 31	S1	Zip Code 319	Regular Winter	112	1	Suburban	05/02/1995			2
<input type="checkbox"/> NewSub Set	383	City 44	S1	Zip Code 383	Regular Winter	112	1	Rural-regular	21/10/1998			2
<input type="checkbox"/> NewSub Set	157	City 15	S1	Zip Code 157	Regular Winter	212	2	Regional	01/07/1984			2
<input type="checkbox"/> NewSub Set	235	City 25	S1	Zip Code 235	Regular Winter	212	2	Suburban	30/03/2001			2
<input type="checkbox"/> NewSub Set	158	City 16	S1	Zip Code 158	Regular Winter	212	2	Regional	01/09/1985			2
<input type="checkbox"/> NewSub Set	159	City 17	S1	Zip Code 159	Regular Winter	212	2	Regional	01/09/1987			2
<input type="checkbox"/> NewSub Set	366	City 41	S1	Zip Code 366	Cold Winter	112	1	Rural-regular	05/11/1997			2
<input type="checkbox"/> RemainingSubset	119	City 7	S5	Zip Code 119	Cold Winter	210	2	Urban	01/08/1986			2
<input type="checkbox"/> RemainingSubset	350	City 37	S5	Zip Code 350	Cold Winter	110	1	Urban	11/06/1996			2
<input type="checkbox"/> RemainingSubset	307	City 27	S4	Zip Code 307	Regular Winter	111	1	Urban	05/02/1995			2
<input type="checkbox"/> RemainingSubset	364	City 40	S2	Zip Code 364	Regular Winter	112	1	Rural-regular	08/11/1997			2
<input type="checkbox"/> RemainingSubset	152	City 13	S3	Zip Code 152	Cold Winter	212	2	Regional	28/05/1986			2
<input type="checkbox"/> RemainingSubset	345	City 35	S2	Zip Code 345	Regular Winter	112	1	Rural-regular	05/03/1996			2
<input type="checkbox"/> RemainingSubset	209	City 22	S5	Zip Code 209	Cold Winter	210	2	Suburban	04/02/1998			2

Store Grid

Stores Tab Components

The following table describes the screen components in the Stores Tab:

Table 2–6 Stores Tab Components

Component	Description
Filter Lists	<p>Use the following lists, in the Filter Lists area, to specify a filter and view a set of stores in the Store grid:</p> <ul style="list-style-type: none"> Subset State Climate Region Ad Desg Division <p>Once you set the relevant options, click Show to view the set of stores you want.</p>
Move List	<p>The Move List list enables you to specify the subset where you want to place the stores you want. For more information, see "Moving Stores to a Different Subset" on page 2-17.</p>
Action list	<p>The Action list includes options that enable you to perform the following administrative tasks:</p> <ul style="list-style-type: none"> "Finding Stores" on page 2-17 "Customizing the Table" on page 2-17 "Printing or Exporting Information" on page 2-17

Table 2–6 (Cont.) Stores Tab Components

Component	Description
Store Grid	The Store grid displays the information on all the stores included in the store set.

Finding Stores

Use the *Find Store* feature (in the Action list on the Stores tab) to find a specific store in the Store grid.

To find a store in the Store grid:

1. On the **Store Set Library** screen, select the store set in which you want to search for the store.

The **Store Set** screen appears.

2. On the **Stores** tab, select **Find Store** in the **Action** list, and click **Apply**.

The **Find Store** screen appears.

3. Type the Store ID for the store you want, and click **OK**.

The Store grid updates with the store highlighted in the color red.

Moving Stores to a Different Subset

Use the *Move List* (on the Stores tab) to move a set of stores to a different subset.

To move a set of stores to a different subset:

1. On the **Store Set Library** screen, select the store set you want.

The **Store Set** screen appears.

2. On the **Stores** tab, select the check box next to the stores you want.

3. In the **Move List** list, click the subset where you want to place the selected stores, and then click **Move**.

A confirmation message appears.

4. Click **OK**.

Customizing the Table

You can change the display of the stores listed within the **Stores** tab by using the **Customize Table** option. For more information, see ["Sorting the User Account Information" on page 2-7](#) and ["Customizing the Columns" on page 2-8](#).

Printing or Exporting Information

You can print the information displayed on the screen or export the information to a Microsoft Excel spreadsheet. For information on how to print or export data, see ["Printing and Exporting the Store Set Information" on page 2-6](#).

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