

**Oracle® Retail Predictive Application Server**

User Guide for the Fusion Client

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## Send Us Your Comments

Oracle Retail Predictive Application Server User Guide for the Fusion Client, Release 13.0.4.20

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

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

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

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# Preface

## Audience

This guide describes the Retail Predictive Application Server Fusion Client user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

## Related Documents

For more information, see the following documents in the Oracle Retail Predictive Application Server Release 13.0.4.20 documentation set:

- *Oracle Retail Predictive Application Server Release Notes*
- *Oracle Retail Predictive Application Server Licensing Information*
- *Oracle Retail Predictive Application Server Installation Guide*
- *Oracle Retail Predictive Application Server Installation Guide for the Fusion Client*
- *Oracle Retail Predictive Application Server Administration Guide for the Fusion Client*
- *Oracle Retail Predictive Application Server Configuration Tools User Guide*
- *Oracle Retail Predictive Application Server Configuration Tools Online Help*
- *Oracle Retail Predictive Application Server Fusion Client Online Help*

For more information about Oracle Retail Merchandise Financial Planning (MFP) on the RPAS Fusion Client, see the following documents in the MFP Release 13.0.4.20 documentation set:

- *Oracle Retail Merchandise Financial Planning Release Notes*
- *Oracle Retail Merchandise Financial Planning Retail Installation Guide*
- *Oracle Retail Merchandise Financial Planning Cost Installation Guide*
- *Oracle Retail Merchandise Financial Planning Operations Guide*
- *Oracle Retail Merchandise Financial Planning Retail User Guide for the RPAS Fusion Client*
- *Oracle Retail Merchandise Financial Planning Cost User Guide for the RPAS Fusion Client*

## Customer Support

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<https://support.oracle.com>

When contacting Customer Support, please provide the following:

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

## Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.0) or a later patch release (for example, 13.0.4). If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

## Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

[http://www.oracle.com/technology/documentation/oracle\\_retail.html](http://www.oracle.com/technology/documentation/oracle_retail.html)

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

## Conventions

The following text conventions are used in this document:

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

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# Getting Started

Welcome to Oracle Retail RPAS Fusion Client. This chapter provides an overview of the application and includes information that help you get started with the application. It includes the following sections:

- [Overview](#)
- [Basic Concepts of RPAS](#)
- [Terminology Differences Between Clients](#)
- [Setting Up Your Browser](#)
- [Logging on to the Fusion Client](#)
- [Opening a Workbook](#)
- [Creating a New Workbook](#)
- [Deleting a Workbook](#)
- [Renaming a Workbook](#)
- [Understanding the Workbook Wizard Window](#)
- [Accessing Online Help](#)
- [Changing Your Password](#)
- [Logging Out of the Application](#)

## Overview

The RPAS Fusion Client is a Web-based rich client for the Retail Predictive Application Server (RPAS) platform developed using the latest Oracle Application Development Framework (ADF).

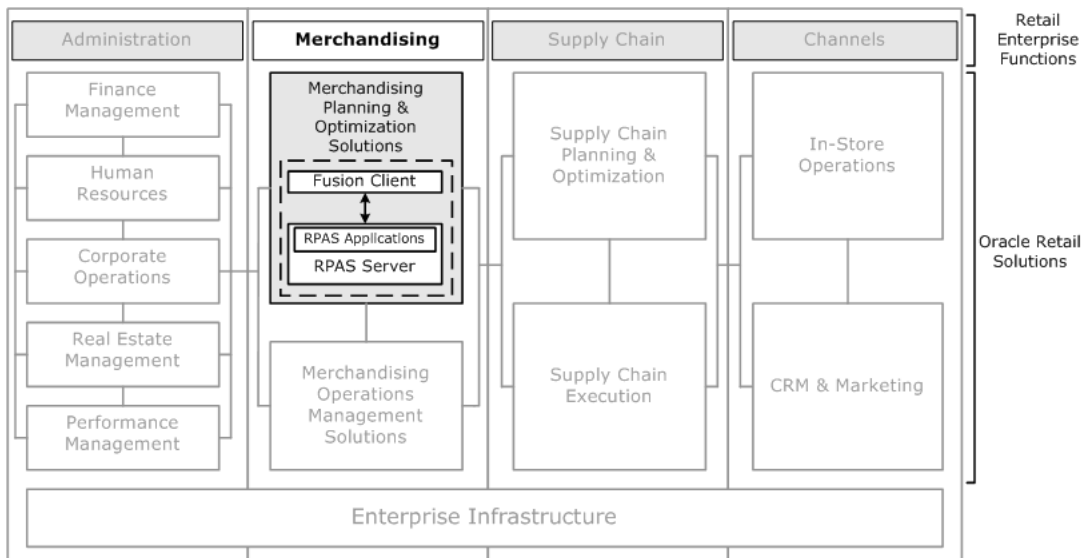
Planning is one of the most important and complex processes in a retail business. It typically involves a complex set of activities that need to be followed as part of a workflow. Unlike the RPAS Windows-based Classic Client, the Fusion Client includes a taskflow feature that provides a robust workflow capability to make each planning activity easier to track and maintain.

The Fusion Client uses the same RPAS server as the RPAS Windows-based Classic Client. In addition to the enhanced user experience, the Fusion Client provides access to a larger number of users and a greater degree of platform independence.

## Where Does the RPAS Fusion Client Fit in a Retail Enterprise

The RPAS platform and Fusion Client form part of the Merchandising Planning and Optimization solutions. The illustration below shows an example of a retail enterprise with the Fusion Client application implemented with the RPAS server hosting an RPAS application. It provides a high level overview of where the Fusion Client application fits in a typical retail enterprise.

**Figure 1–1 RPAS Fusion Client in a Retail Enterprise**



## Basic Concepts of RPAS

Retail Predictive Application Server (RPAS) is a configurable platform with a proven scalability for developing multidimensional forecasting and planning based solutions. This platform provides capabilities such as a multidimensional database structure, batch and online processing, a configurable slice-and-dice user interface, a sophisticated configurable calculation engine, user security and utility functions such as importing and exporting, all on a highly scalable technical environment that can be deployed on a variety of hardware.

This section introduces you to the following RPAS concepts:

- [Multidimensionality](#)
- [Dimensions](#)
- [Measures](#)
- [Domains and Workbooks](#)

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**Note:** For more information on these RPAS concepts, refer to the *RPAS User Guide*.

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## Multidimensionality

In RPAS, information is stored and represented based on the multidimensional framework. In a multidimensional database system, data is presented as a multidimensional array, where each individual data value is contained within a cell accessible by multiple indexes.

Multidimensional database systems are a complementary technology to entity relational systems and achieve performance levels above the relational database systems. Applications that run on RPAS identify data through dimensional relationships. Dimensions are qualities of an item (such as a product, location, or time) or components of a dimension that define the structure and roll up within the dimension.

## Dimensions

Dimensions describe the top-to-bottom relationship between the levels or positions of the dimensions in RPAS. They reflect the dimensions set up at your business and being used by the merchandising solutions.

RPAS supports many alternative dimensions that provide different roll ups and help analyze the data from a different perspective.

## Measures

Measures represent the events or measurements that are recorded, while the positions in the dimensions provide a context for the measurement. Measures are defined based on the business rules set in the application. The dimensionality of a measure is configured through the definition of its base intersection, which is the collection of levels (one per appropriate dimension) defining the lowest level at which the information is stored for the measure.

Measure names are completely configurable and typically named using a convention that identifies each component and the meaning of the measure.

## Domains and Workbooks

RPAS stores information in a persistent multidimensional data cache that is optimized for large volumes and dimensional or time series data access requirements, typically required by multidimensional solutions. This central repository is called a domain. The domain also includes central definitions of metadata for the solution and provides a single update point.

When you use an RPAS solution, you interact with the solution through a personal data repository called a workbook. A workbook contains the subset of the data (and metadata) from the domain and its scope is constrained by the access rights available to a user. Workbooks are stored on the RPAS server, and can be built using an online wizard process or scheduled to be built in a batch process automatically.

Although the data and metadata in the workbook are copied from the domain, the data remains independent of the domain.

## Terminology Differences Between Clients

There are some key terminology differences between the Fusion Client and Classic Client. Understanding these differences is useful if you use both clients. The following table describes the differences.

**Table 1–1 Terminology in the Fusion Client and Classic Client**

Fusion Client Term	Term Description	Classic Client Term
Dimension	Grouping of a particular type of information. Typical dimensions are for products, locations, time, and measures. For instance, a Product dimension could contain information about items, item groups, departments, and divisions.	Hierarchy
Level	A subdivision of a dimension. Levels group information of the same type. For instance, a level within the Product dimension could be Department. The Department level would contain all the departments (men's shoes, women's shoes, children's shoes) that exist.	Dimension

## Setting Up Your Browser

The Fusion Client can be accessed using the Microsoft Internet Explorer 7 Web browser. Before you access the application for the first time, you must set up the following browser settings to allow seamless and error free access:

- Cache Settings, see [Setting Up Cache](#).
- Security Settings, see [Setting Up Security Settings](#).

Based on the zone where the application is installed, you may configure your browser settings for **Local intranet** or as a **Trusted sites** zone.

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**Important:** Do not select **Internet** unless you have been instructed to do so by the administrator. In most cases, the application will be available on your company's intranet (**Local intranet**) or on an Oracle trusted site (**Trusted sites**).

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## Setting Up Cache

To set up the browser cache settings:

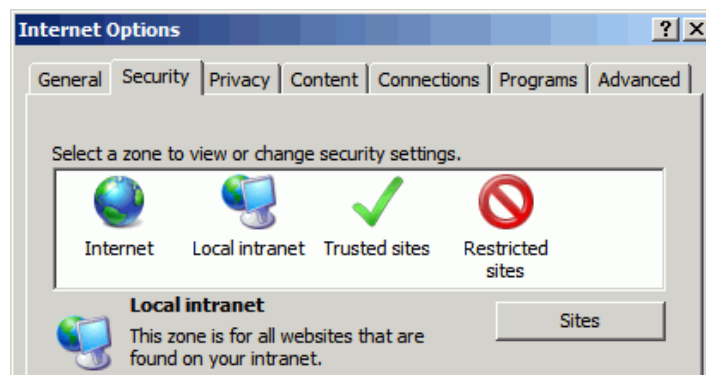
1. Start Internet Explorer.
2. From the Tools menu, click **Internet Options**.
3. On the General tab, in the Browsing History area, click **Settings**. The Temporary Internet Files and History Settings dialog box appears.
4. In the Temporary Internet Files area, click the **Everytime I visit the webpage** radio button, and click **OK**.

## Setting Up Security Settings

To set up the browser security settings:

1. Start the Internet Explorer as you normally do.
2. From the Tools menu, click **Internet Options**.
3. On the Security tab, click **Local intranet**, and then click **Sites**.

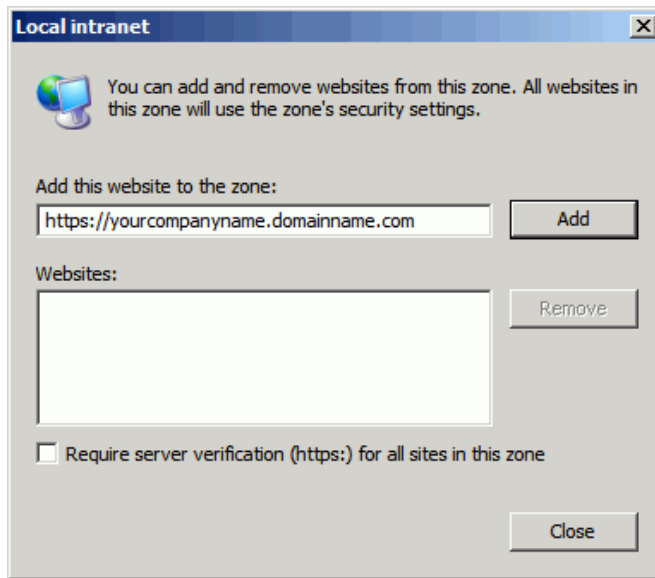
**Figure 1–2 Internet Options - Security Tab**



4. On the Local intranet window, click **Advanced**.

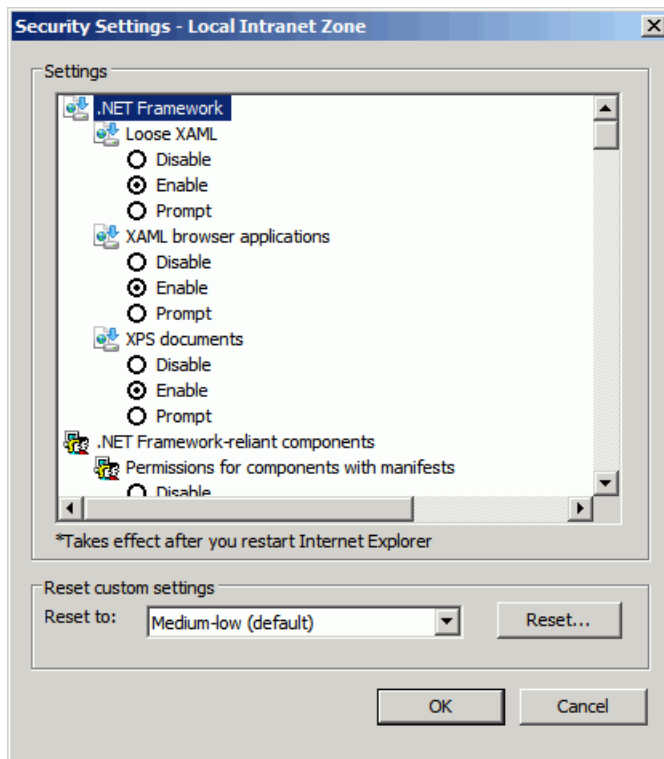
5. In the **Add this website to the zone** field, enter the application URL, click **Add**, and then click **Close**.

**Figure 1–3 Local Intranet Window - Add Website to the Zone**



6. On the Local intranet window, click **OK**.
7. In the Security level for this zone area, click **Custom level...**

**Figure 1–4 Security Settings - Local Intranet Zone Window**



8. In the **Security Settings - Local Intranet Zone** window, select the **Prompt** or **Enable** option for the following parameters:

**Table 1–2 Parameters in the Security Settings Window**

Category	Parameter Name
<b>ActiveX controls and plug-ins</b>	
	Download signed ActiveX controls
	Initialize and script ActiveX controls not marked as safe for scripting
	Run ActiveX controls and plug-ins
<b>Downloads</b>	
	File download
<b>Miscellaneous</b>	
	Allow websites to open without address or status bars
<b>Scripting</b>	
	Active scripting

---

**Note:** For more information on the **Prompt** and **Enable** options, see [About Prompt and Enable Options](#).

---

9. Once you set up these parameters, click **OK**. A message appears that prompts you for a confirmation on the changes to the settings for the zone.
10. Click **Yes** to accept the changes. Based on the settings you changed, you may need to restart the Internet Explorer for the changes to take effect.

### About Prompt and Enable Options

The **Prompt** option provides a confirmation message box each time a specific action (for example, Download signed ActiveX controls) occurs on the Web browser. The browser grants access to the actions, based on your response.

The **Enable** setting provides a direct access to the specified action without any notification.

You may select the **Prompt** option for the download options because the downloads typically occur one time. For the running and scripting actions, since they occur frequently, you may select the **Enable** option. In case you select the **Prompt** option, you may have to respond to a message box several times in an application session.

## Logging on to the Fusion Client

Before you log on to the Fusion Client, ensure that your system meets the recommended configuration. For more information, see the *RPAS Installation Guide for the Fusion Client*.

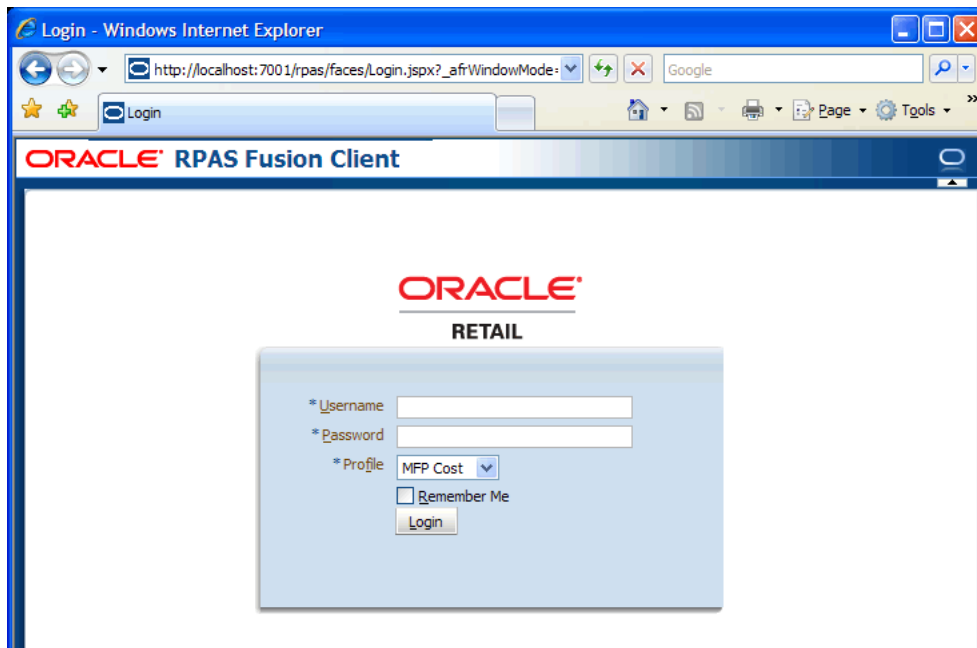
Once you check the configuration, obtain the following information:

- Uniform Resource Locator, URL – Enter the URL or the Web address of the application in the Web browser to access the application. For example:  
`http://<fullyqualifieddomainname>:<port>/rpa`
- User name, Password, and Profile Name – Based on the tasks you want to perform, obtain a user account (that includes user name and password) to log on to the application.

To log in to the Fusion Client:

1. Start Internet Explorer.
2. In the **Address** bar, enter the Fusion Client URL, and press **Enter**. The Fusion Client Login page appears.

**Figure 1–5 Fusion Client Login Page**



3. On the **Login** page, enter the username and password, and select the relevant profile in the **Profile** drop-down list.

---

**Note:** Profiles are the RPAS solution domains you want to connect to. Profiles can be created during the installation process. After installation, you can manually create additional profiles in the ProfileList.xml file. For more information, refer to the *RPAS Administration Guide for the Fusion Client*.

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4. Click **Login**.

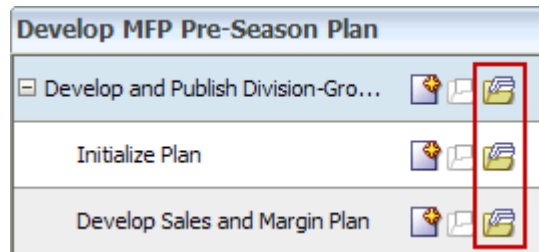
## Opening a Workbook

Once you log on to the application, a taskflow pane appears that enables you to navigate through the activities and tasks associated with your user account.

To open a workbook:

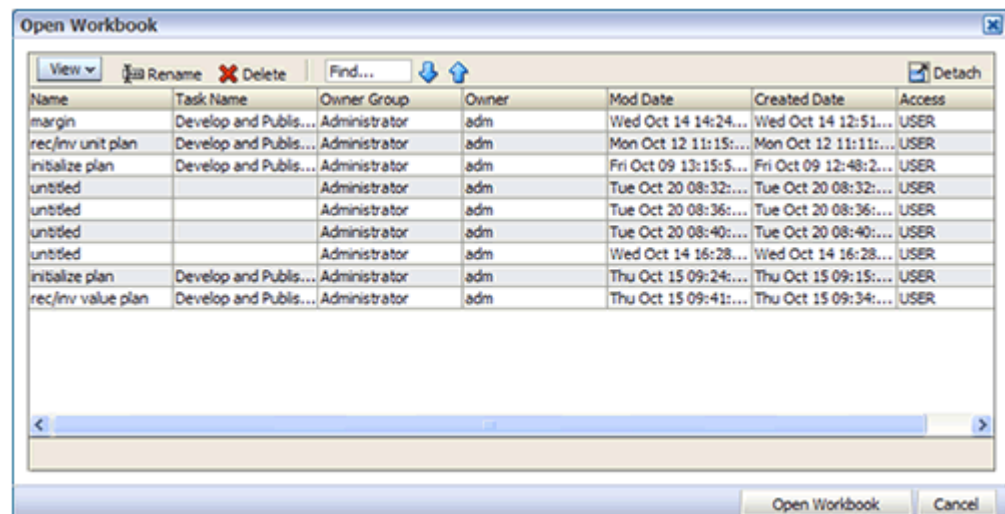
1. On the taskflow pane, click the **Show List of Workbooks** button next to the task/step you want. For more information on the taskflow pane, see the [Taskflow Pane](#) section.

**Figure 1–6 Show List of Workbooks Button**



The **Open Workbook** window appears.

**Figure 1–7 Open Workbook Window**

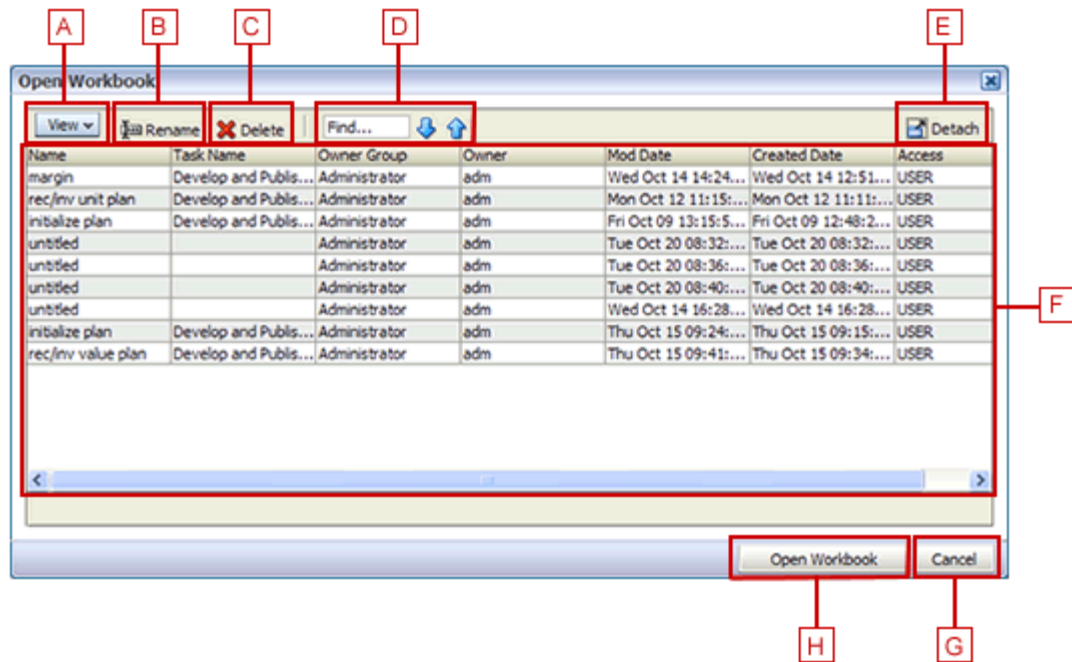


2. Select the workbook you want, and click **Open Workbook**.

## Understanding the Open Workbook Window

The following figure highlights the various components of the Open Workbook Window user interface:

**Figure 1–8 Open Workbook Window User Interface Components**



The following table describes the screen components of the Open Workbook window:

**Table 1–3 Open Workbook Window User Interface Components**

Legend	Screen Area Name	Position	Description
A	View menu	Top Left	The View menu enables you to view all the workbooks that you own. It also provides you the option to show or hide any column in the workbooks grid.
B	Rename	Top Left	Enables you to rename a workbook.
C	Delete button	Top Left	Enables you to delete a workbook. For more information, see <a href="#">Deleting a Workbook</a> .
D	Find field, Previous and Next arrows	Top Center	Enables you to identify the workbooks with the keywords you entered in the Find field.  Use the Previous and Next arrows to navigate between the workbooks matching the search pattern. The search is not case-sensitive.
E	Detach button	Top Right	Enables you to view the list of workbooks in a larger window.



**Table 1–3 (Cont.) Open Workbook Window User Interface Components**

Legend	Screen Area Name	Position	Description
F	Workbooks grid	Center	Displays the list of workbooks in the current profile. By default, only the workbooks that you own appear.  To view all the workbooks, under the <b>View</b> menu, click <b>All</b> .
G	Cancel button	Bottom Right	Enables you to cancel an action and exit the Open Workbook window.
H	Open Workbook button	Bottom Right	Once you select the workbook you want, click this button to open the workbook.

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**Note:** You can open only one workbook at a time.

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## Creating a New Workbook

The new workbook wizard enables you to create workbooks based on the templates set up during the implementation. These templates typically represent a high level business activity in your organization.

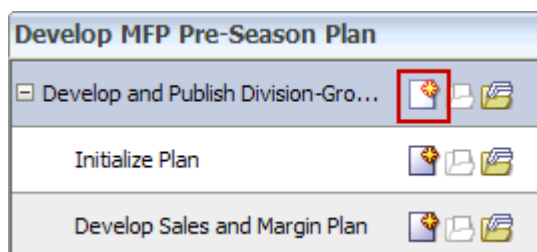
Based on the configuration, each template in the RPAS domain may include many measures at different positions. Each workbook template is associated with one of the following wizards that help you filter and include the relevant information for the workbook:

- Standard Two Tree Wizard is a set of similar looking two tree pages that help select positions in different dimensions.
- Custom Wizard offers flexibility to the configuration personnel to provide a custom set of pages for choosing positions.

The wizards are set up and associated with the workbook template using the RPAS Configuration tool.

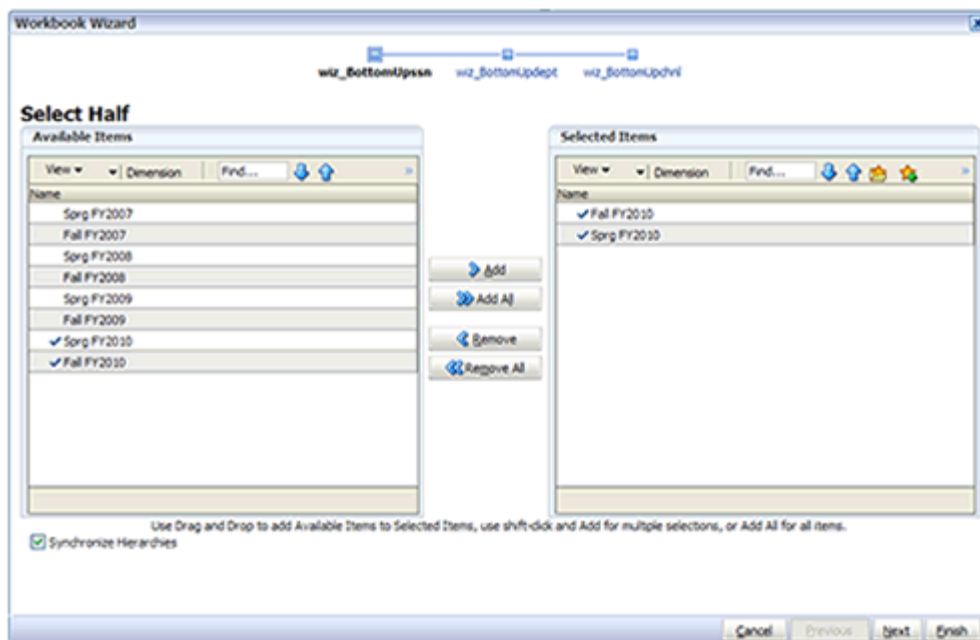
To create a new workbook:

1. In the taskflow, click the **Create New Workbook** icon next to the task/step you want. For more information on the taskflow, see the [Taskflow Pane](#) section.

**Figure 1–9 Create New Workbook Button**

2. Based on the configuration of the workbook template, an associated wizard appears. The wizard provides you with positions that help you filter and include the relevant information in the workbook.

**Figure 1–10 Workbook Wizard**



3. In the **Available Items** area, select the positions you want by holding down the **Ctrl** or **Shift** keys, and click **Add**. You can click **Add All** to select all the positions.  
OR  
Drag and drop the positions to the **Selected Items** area.
4. Follow the instructions in the wizard, and once you have selected the positions you want, click **Finish**.

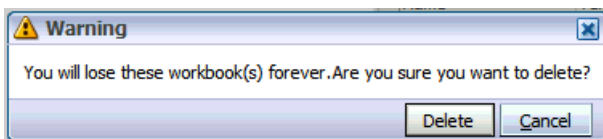
## Deleting a Workbook

From the list of workbooks, you can delete any workbook you have write access to.

To delete a workbook:

1. On the **Open Workbook** window, select the workbook you want.  
To delete more than one workbook, hold down the **Ctrl** key and select the workbooks you want to delete. Or, you can hold down **Shift** and select a group of workbooks.
2. Click **Delete**. A warning message appears.

**Figure 1–11 Delete Warning Message**



3. Review the warning message, and then click **Delete** to delete the workbooks or click **Cancel** to cancel this operation.

## Renaming a Workbook

The new workbook wizard also enables you to rename existing workbooks without affecting the data within the workbook or the other workbook information such as the created date, modified date, formatting information and so on.

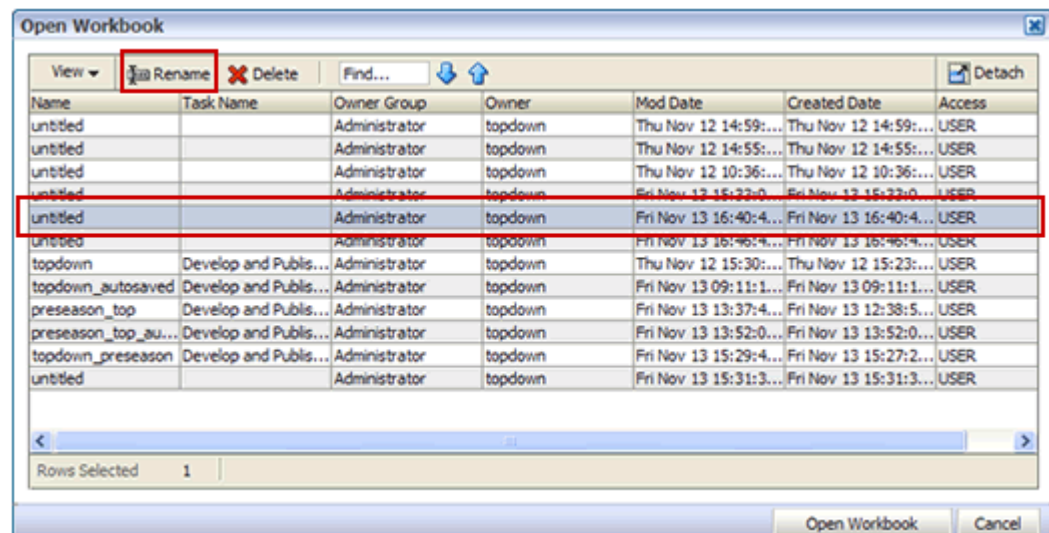
There are a few key points to know about renaming workbooks:

- You can only rename workbooks that you have write access to.
- Workbook names can be no more than 32 characters
- Workbook names cannot contain double or single quotation marks.
- Workbooks cannot be named "Untitled." This name is reserved.

To rename a workbook in the new workbook wizard, perform the following steps.

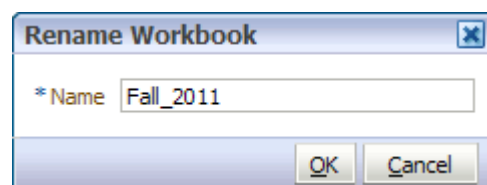
1. Select the workbook you want to rename from the list. When selected, it becomes shaded, as shown in [Renaming a Workbook](#)
2. Click **Rename**.

**Figure 1–12 Renaming a Workbook**



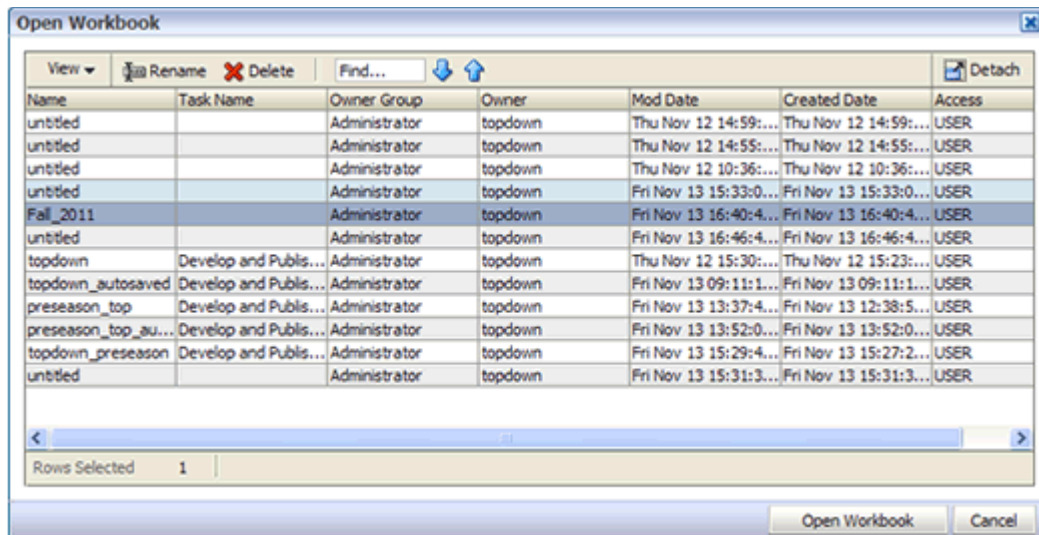
3. The Rename Workbook dialog box appears. Enter the new name of the workbook and click **OK**.

**Figure 1–13 Rename Workbook Dialog Box**



4. The renamed workbook appears in the workbook list.

**Figure 1–14 Renamed Workbook**

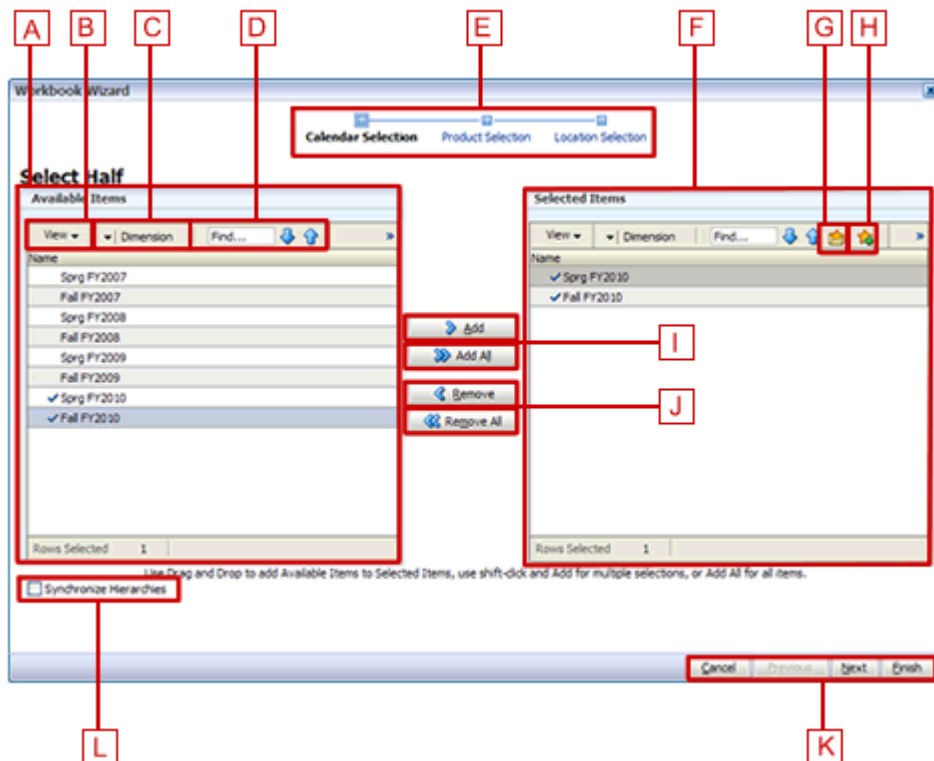


You can also rename a workbook from the File menu. For more information about this option, see [Renaming Workbooks](#).

## Understanding the Workbook Wizard Window

The following figure highlights the various components of the workbook wizard window:

**Figure 1–15 Workbook Wizard**



The following table describes the screen components of the workbook wizard window:

**Table 1–4 Workbook Wizard Window User Interface Components**

Legend	Screen Area Name	Position	Description
A	Available Items area	Center Left	Displays the positions that are available for you to select.
B	View menu	Center Left, within the Available Items area	Provides options for viewing the available positions. You can adjust the column setting, detach the list to view it in a larger window, expand or collapse the positions, or scroll to the beginning or end of the list.
C	Dimension menu	Center Left, within the Available Items area	Opens the Dimension options window where you can select the levels of the dimension you want to view in the Available Items list. You can also select the attributes that you would like to see and sort by in the list.
D	Find field, Previous and Next arrows	Center Left, within the Available Items area	Enables you to identify the positions with the keywords you entered in the Find field. Use the Previous and Next arrows to navigate between the workbooks matching the search pattern. The search is not case-sensitive.
E	Wizard Taskflow	Top Center	Displays the steps in the wizard process and shows you where you are within that process. The wizard taskflow is configured in the RPAS Configuration Tools. For more information, see the <i>RPAS Configuration Tools User Guide</i> .
F	Selected Items area	Center Right	Displays the positions you selected. It also includes a toolbar that enables you to perform various functions.
G	Load Favorite icon	Center Right, within the Selected Items area	Enables you to select a previously saved group of positions to load into the workbook. For more information, see <a href="#">Saving and Loading Favorites</a> .
H	Save Favorite icon	Center Right, within the Selected Items area	Enables you to save the positions you have selected as group. The next time you build a new workbook, you can select and load that group rather than choosing the same positions individually again. For more information, see <a href="#">Saving and Loading Favorites</a> .
I	Add and Add All buttons	Center	Enables you to add positions that are selected in the Available Items area. To add all positions in the Available Items area, click the <b>Add All</b> button.
J	Remove and Remove All buttons	Center	Enables you to remove positions in the Selected Items area. To remove all positions in the Selected Items area, click the <b>Remove All</b> button.
K	Wizard Navigation buttons	Bottom Right	Enables you to navigate from one wizard page to another. Once you have made the selections for the workbook and clicked <b>Finish</b> , the workbook builds with the selected positions.
L	Synchronize Hierarchies check box	Bottom Left	When selected, the shown levels within the Selected Items area match the ones in the Available Items area. This is selected by default.

## Saving and Loading Favorites

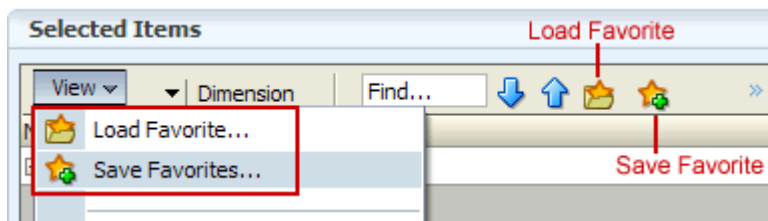
Once you have selected the positions that you want to appear in the workbook you are building, you can save that collection of positions for future use by using the **Save Favorite** and **Load Favorite** features. You can save the collection of positions for each dimension presented in the workbook wizard.

### Saving Favorites

To save the selected positions as a favorite, perform the following:

1. Once you have moved the positions to the Selected Items area, click the **Save Favorite** icon or select **Save Favorites** from the View menu. See [Figure 1–16](#).

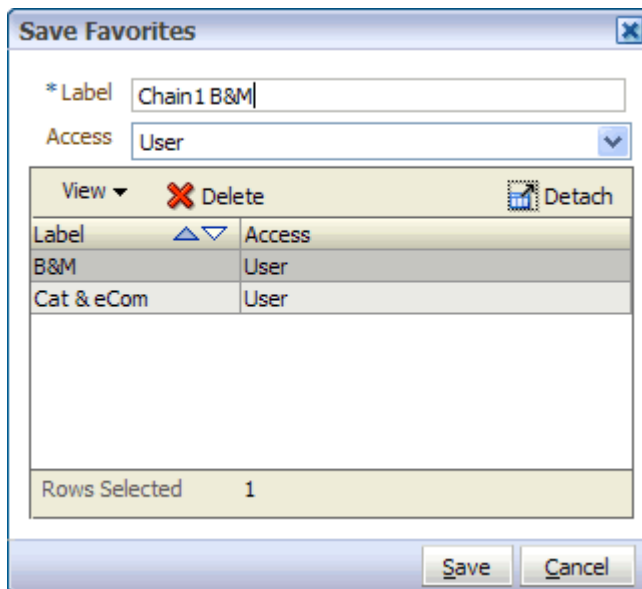
**Figure 1–16 Save and Load Favorites Icons**



2. The Save Favorites window appears. Enter the name of the favorite in the **Label** field. In the **Access** field, choose one of the following:
  - **User:** This option makes the favorite available to only the user who created it.
  - **World:** This option makes the favorite available to all users.

Note that previously saved favorites are listed in the table.

**Figure 1–17 Save Favorites Window**

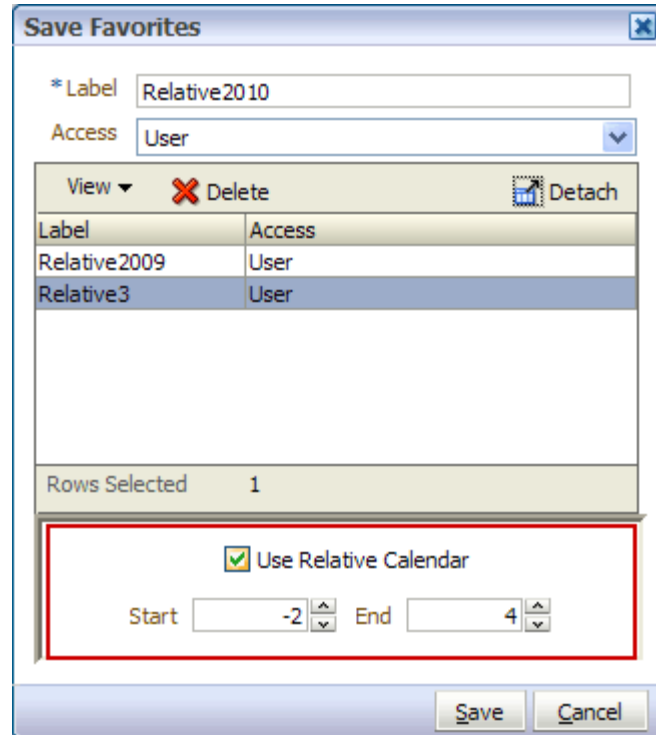


3. When finished, click **Save**. If you would like to abandon the changes, click **Cancel**.

## Saving Calendar Positions as Favorites

When saving positions in the Calendar dimension, you have the option to use a relative calendar rather than the predefined time periods that are shown in the wizard. This enables you to use a range of time periods that are relative to the current date. As time passes, the calendar favorite updates the range of time to be in relation to the new date.

**Figure 1–18 Save Favorites – Calendar Dimension**



The length of the time periods is determined by the lowest level of the Calendar dimension presented in the wizard. For instance, if the lowest level in the wizard is Week, then when you select the time range in the relative calendar option, you choose the number of weeks to include.

To use the relative calendar feature, perform the following:

1. In the calendar step of the workbook wizard, click the **Save Favorite** icon. You do not need to move a position to the Selected Items list.
2. In the Save Favorites window, enter the name in the **Label** field and select the access level in the **Access** field.
3. At the bottom of the window, select the **Use Relative Calendar** option.
4. In the **Start** field, enter the number or use the arrows to choose the number of time periods in relation to today's date for the start period. For instance, if the workbook's lowest calendar level is week and you want the time period to begin 2 weeks in the past from today's date, you would enter **-2**. If you wanted it to begin 2 weeks in the future, you would enter **2**.
5. In the **End** field, enter the number of weeks in relation to today's date that you want the time period to end.
6. When finished, click **Save**.

## Editing Favorites

To change or update a favorite, perform the following:

1. Move the updated set of positions to the Selected Items area.
2. Click the **Save Favorite** icon or select **Save Favorites** from the View menu.
3. In the Save Favorites window, select the favorite that you want to edit from the list.
4. Update the Access level if necessary.
5. Click **Save**. The favorite now includes the new set of positions.

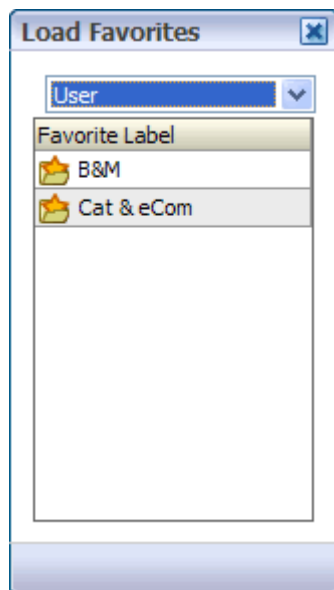
## Loading Favorites

Once you have saved a favorite, you can load it into to the workbook wizard. Loading favorites into the wizard rather than selecting individual positions from the wizard every time you create a workbook will save you time.

To load a favorite, perform the following:

1. In the workbook wizard, click the **Load Favorite** icon.
2. The Load Favorites window appears. Click the favorite you want to load. The Load Favorites window automatically closes.

**Figure 1–19** Load Favorites Window



3. In the workbook wizard, the positions from the favorite now appear in the Selected Items area.

## Deleting Favorites

To delete a favorite, perform the following steps:

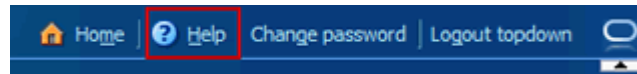
1. Click the **Save Favorite** icon or select **Save Favorites** from the View menu.
2. Select the favorite you want to delete from the list.
3. Click **Delete**. The favorite is deleted and no longer appears in the list.



## Accessing Online Help

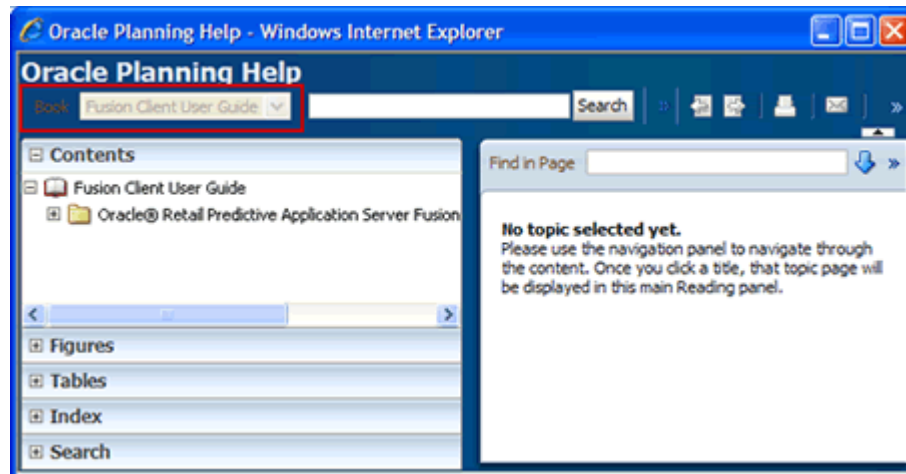
To access online help, click **Help** in the global header.

**Figure 1–20 Online Help Link**



The online help appears in a new browser window. If more than one help set is available, you can choose which one to view by selecting it from the Book drop-down field. If there is only one help set, the field is shaded.

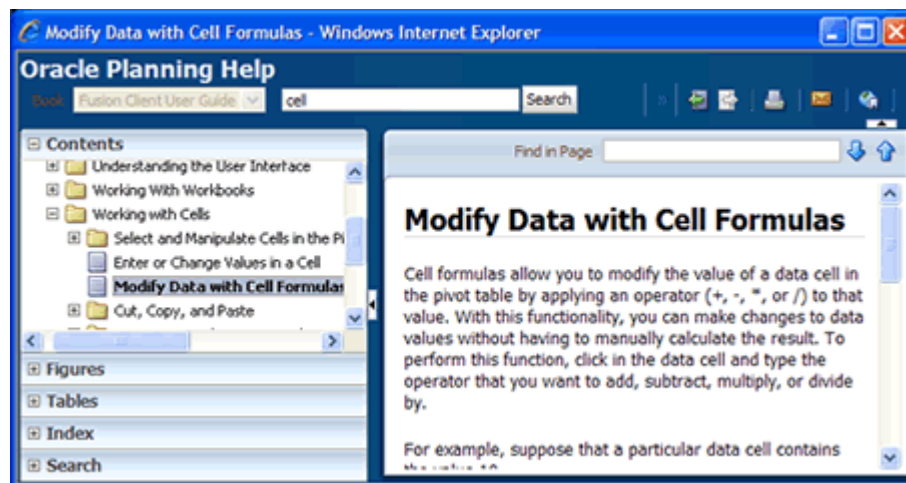
**Figure 1–21 Online Help Window, Book Field**



## Contents

The contents of the online help set are shown in the Contents section of the navigation bar on the left. Click the **Expand** icon next to the folders to drill down to the help topics. Click the page you want to view. It appears in the content area.

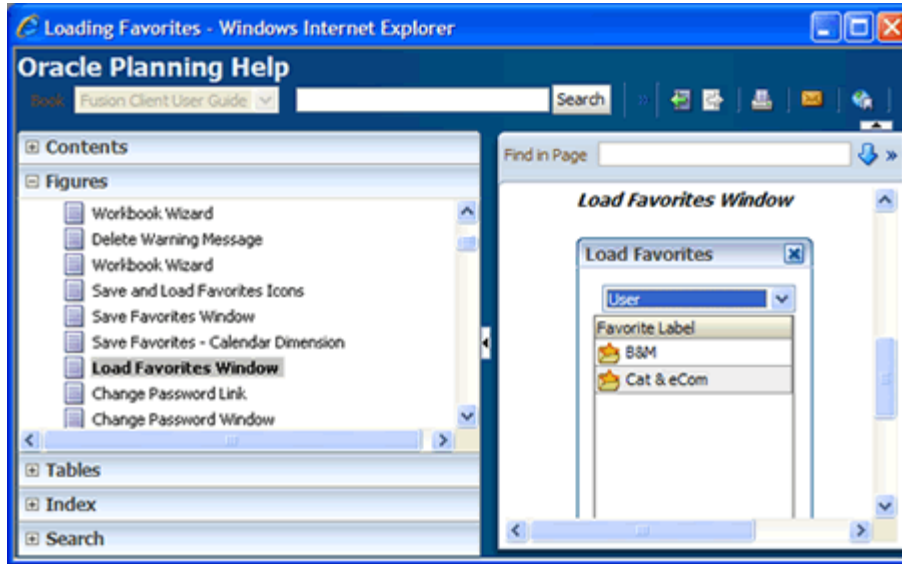
**Figure 1–22 Help Topic within Online Help**



## Figures and Tables

To view a list of figures or tables, click the **Figures** or **Tables** bar.

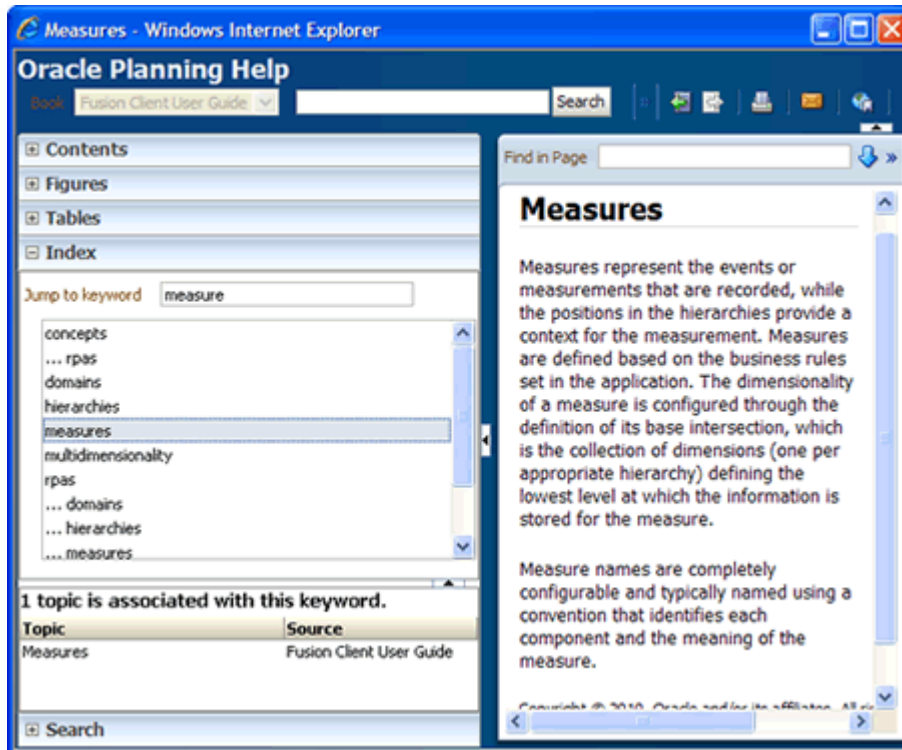
**Figure 1–23 Online Help: Figure List**



## Index

In the Index, you can enter keywords to find topics that contain this keyword. Click the topic name to see the page.

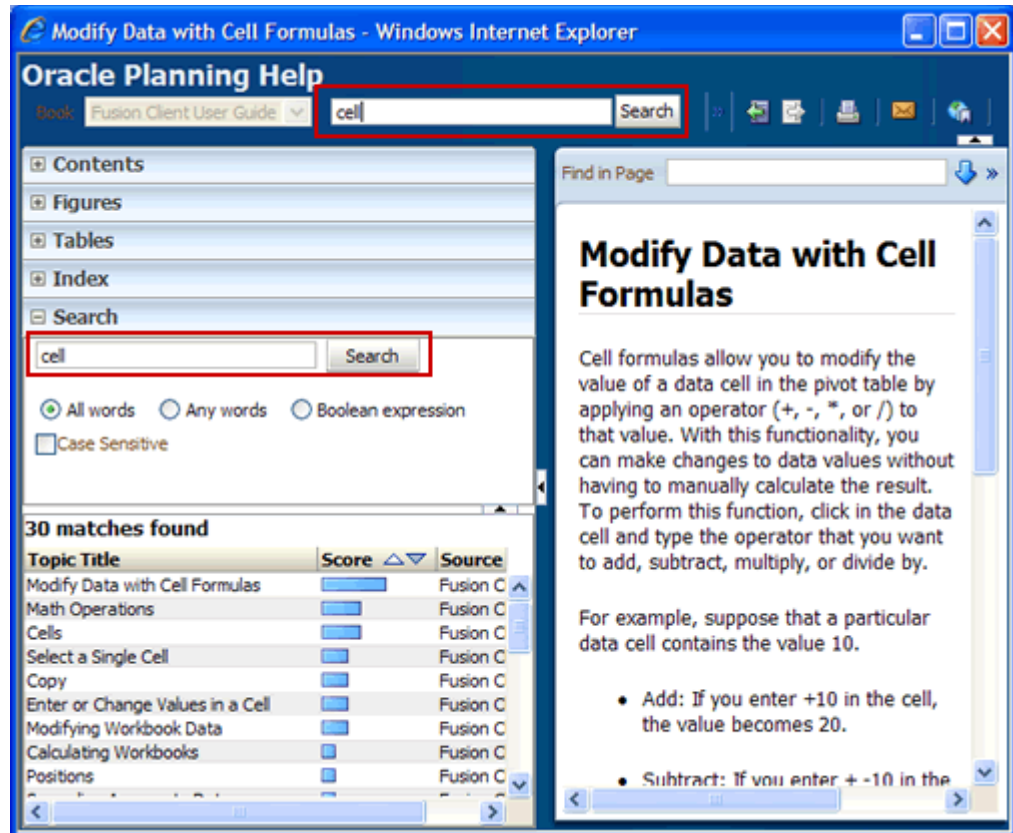
**Figure 1–24 Online Help: Index**



## Search

Use the Search field at the top of the online help window or the Search section within the navigation bar to search for words or phrases.

**Figure 1–25** *Online Help: Search*

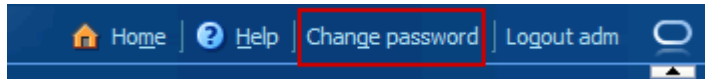


## Changing Your Password

Use the following instructions to change your password. Note that users may be prompted to change their password when logging in for the first time.

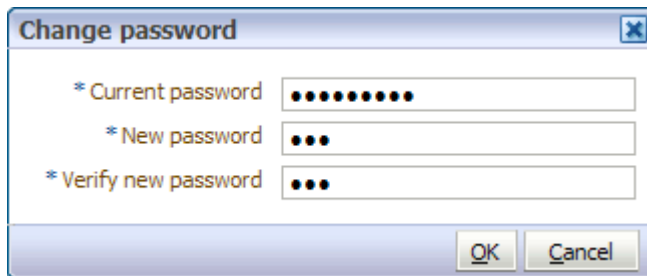
1. To change your password, click **Change password** in the global header.

**Figure 1–26** *Change Password Link*



2. In the Change password window, enter your current password and then enter and verify the new password.

**Figure 1–27** *Change Password Window*



3. When finished, click **OK**.

## Logging Out of the Application

To log out of the application:

- On the application screen, click **Logout** in the top-right corner.

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**Note:** You may be prompted to save and commit the workbook data before logging out of the application.

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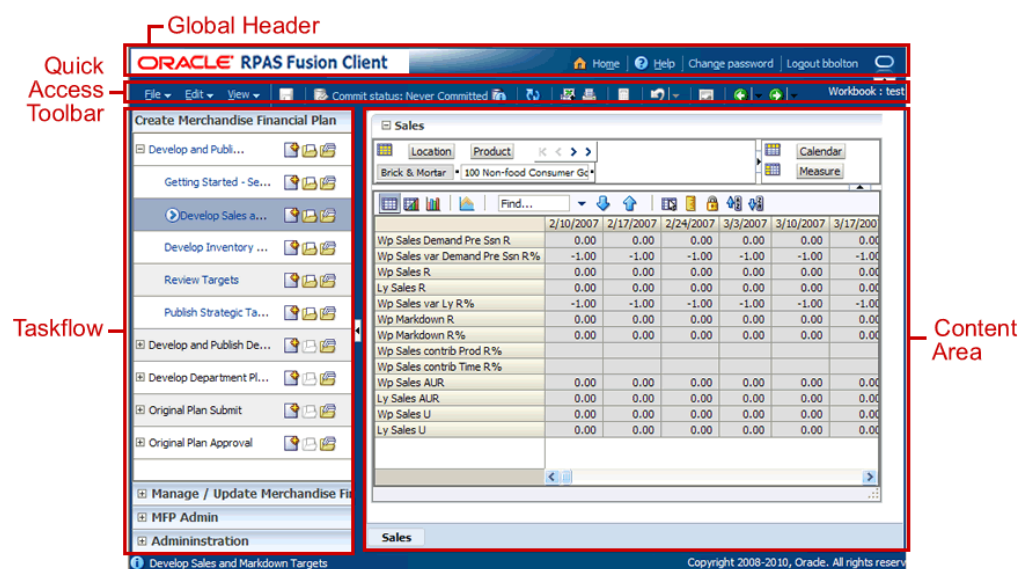
## Understanding the User Interface

This chapter introduces you to the workbook user interface and describes the following screen components:

- Quick Access Toolbar
- Taskflow Pane
- Contents Area

The following figure highlights the various components of the workbook user interface:

**Figure 2-1 Workbook User Interface**



The following table describes the user interface components in the workbook user interface:

**Table 2-1 Workbook User Interface Screen Components**

Screen Component	Description
Global Header	Displayed at the top of the screen, this area appears across all the business applications and custom pages. It includes the application branding and links for the Home page, Online Help, changing a password, and logging out of the application.

**Table 2–1 (Cont.) Workbook User Interface Screen Components**

Screen Component	Description
Quick Access Toolbar	Displayed below the global header, the quick access toolbar includes the menus and icons that will enable you to perform various actions in the workbook. For more information, see <a href="#">Quick Access Toolbar</a> .
Taskflow Pane	Displayed on the left of the screen, the taskflow pane provides a workflow that helps you navigate through the application. It lists the each activity, associated tasks, and steps involved to complete an activity. For more information, see <a href="#">Taskflow Pane</a> .
Content Area	Displayed on the right of the screen, the content area includes views and tabs associated/configured for each task and step in the application workflow.

## Quick Access Toolbar

The following figure highlights the various components on the Quick Access toolbar:

**Figure 2–2 Quick Access Toolbar Components**

The following table describes the quick access toolbar components highlighted in the figure above (Figure 2–2):

**Table 2–2 Quick Access Toolbar Components**

Legend	Toolbar Component	Description
A	File menu	The File menu provides access to the general options for the workbook, such as Save, Commit, and so on. For more information on each option available in the File menu, see <a href="#">File Menu Options</a> .
B	Edit menu	The Edit menu provides access to the options associated with cell edits, such as Cut, Undo, and so on. For more information, see <a href="#">Edit Menu Options</a> .
C	View menu	The View menu provides options that enable you to quickly access one of the workbooks from the taskflow using the Go To sub menu. It also contains the synchronize page edge option, formatting options, and tiling options. For more information, see <a href="#">View Menu Options</a> .
D	Save Icon	The Save icon enables you to save the changes you make in the workbook. You can also access this option from the File menu. For more information on saving the workbooks, see <a href="#">Saving Workbooks</a> .
E	Commit and Commit Status Icons	The Commit icon enables you to commit the changes to the domain. You can also access this option from the File menu.  The Commit Status icon enables you to view the current statuses of the current commit requests in the Commit Status dialog box. For more information on committing the workbooks, see <a href="#">Committing Workbooks</a> .

**Table 2–2 (Cont.) Quick Access Toolbar Components**

Legend	Toolbar Component	Description
F	Refresh Workbook	The Refresh Workbook icon allows you to update a workbook with the data that is currently stored in the domain. This allows you to work with the most current data without having to rebuild the workbook. Workbooks can be refreshed with a single refresh rule group or a multiple ones. For more information, see <a href="#">Refreshing Workbooks</a> .
G	Export Icon	The Export icon enables you to export the view to an external program. For more information, see <a href="#">Export</a> .
H	Print Icon	The Print icon enables you to print the view by exporting it to an external program. For more information, see <a href="#">Print</a> .
I	Calculate Icon	After you edit the cells within the workbook, use the Calculate icon to calculate and update the associated cells within the workbook. You can also access this option from the Edit menu. For more information, see <a href="#">Calculating Workbooks</a> .
J	Undo Icon and Drop-down List	The Undo icon enables you to undo actions you performed within the entire workbook (not just the current view). You can also access this option from the Edit menu. When more than one action has been performed, a drop-down list of the last performed actions is available. From that list you can select the actions to undo.
K	View/Manage Images	The View/Manage Images icon enables you to associate images with specific dimension positions. This feature is especially useful for the product and location dimensions. For instance, you can associate an item with a image of what it should look like displayed on the shelf. You can associate stores with images of the store front or interior. For more information, see <a href="#">Images</a> .
L	Previous and Next Icons	The Previous and Next icons enable you to navigate to the previous or next task/step in the taskflow. You can also click the down arrow (next to both the icons) to quickly jump to a specific task or step within the workflow.
M	Workbook Name	This area displays the name of the currently open workbook.

## File Menu Options

File menu includes the following options:

- **Save** – Allows you to save all information in the workbook. This includes information on the current layout of views and charts. You can also click the Save icon on the toolbar. For more information, see [Saving Workbooks](#).

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**Note:** The Save option does not commit the changes to master domain.

---

- **Save As** – Allows you to save the workbook with a name and access you want. For more information, see [Save As Option](#).
- **Rename** – Allows you to rename the workbook. For more information, see [Renaming Workbooks](#).
- **Commit** – This option allows you to commit the changes to the master domain. Once committed, all other users with access to the workbook will notice the changes as well. For more information, see [Committing Workbooks](#).
- **Commit Status** – This option allows you to view the status of committed workbooks. For more information, see [Committing Workbooks](#).



- **Page Setup** – Enables you to change the orientation, scaling, margins, header, footer, and page breaks for the page when printing.
- **Print** – Enables you to print the view by exporting it to Microsoft Excel. For more information, see [Print](#).
- **Export** – Enables you to export the view to Microsoft Excel. For more information, see [Export](#).
- **Revert** – This option closes an open workbook without saving it and reopens it. This removes any changes made to the workbook and resets it to the last saved value.

## Edit Menu Options

The Edit menu includes the following options:

- **Undo** – Allows you to undo the last action you performed within the workbook (not just the current view).
- **Calculate** – Allows you to submit the edited data to the server for processing.
- **Refresh** – Allows you to update a workbook with the data that is currently stored in the domain. This allows you to work with the most current data without having to rebuild the workbook. Workbooks can be refreshed with a single refresh rule group or a multiple ones. For more information, see [Refreshing Workbooks](#).
- **Cut** – Allows you to copy and remove data from the cells of a view in order to move the data to cells in the same view, cells in another view, or other applications. For more information, see [Cut](#).
- **Copy** – Copies selected data to the application clipboard. It keeps data in a clipboard which you can use to transfer data within RPAS as well as to an outside application such as Excel. For more information, see [Copy](#).
- **Paste** – Pastes the data was last placed on the clipboard into the selected cells within the RPAS Fusion Client. For more information, see [Paste](#).
- **Cut Special** – Cuts data at the base level or higher level intersection across page slices. If multiple levels (product group, style, etc.) are represented in the pivot table selections, the cut option is performed at the lowest level actually selected. For more information, see [Cut Special](#).
- **Copy Special** – Copies data at the base level or higher level intersection across page slices. You can view data at an aggregate level while copying data at a dimensional level not currently displayed or while selecting data from the current slice while copying data from all slices. For more information, see [Copy Special](#).
- **Paste Special** – Allows you to view data at an aggregate level while pasting it at the base level which is not displayed in the current slices. It provides a dialog where user can specify options for specialized paste functions. For more information, see [Paste Special](#).
- **Fill** – Enables you to quickly populate many cells of a writable measure at a time.
- **Clear** – Enables you to quickly clear the contents of cells in a view and set them to their NA value. You can clear one or more cells, a dimension level, or an entire slice.
- **Lock** – Protects cells, measures, and positions from being edited. For more information, see [Locking and Unlocking](#).



- **Unlock** – Allows you to remove the protection of cells, measures, and positions so that they can be edited. For more information, see [Locking and Unlocking](#).
- **Unlock All** - Allows you to remove the protection from all cells, measures, or positions so that they can be edited. For more information, see [Locking and Unlocking](#).
- **Find**- Enables you to search for phrases within the rows, column, and page axis of an active view. The search does not include the data within the view. For more information, see [Find](#).

## View Menu Options

The View menu includes the following options:

- **Go To** submenu – In addition to the **Previous** and **Next** icons on the Quick Access toolbar, the Go To submenu enables you to navigate through the workflow or to a specific step.
- **Synchronize Page Edge** – Enables you to simultaneously scroll through the page edge of multiple views. It is useful when you want to compare multiple views containing the same page or slice dimension. For more information, see [Synchronized Page Edge Scrolling](#).
- **View/Manage Images** – Enables you to associate images with specific dimension positions. This feature is especially useful for the product and location dimensions. For instance, you can associate an item with a image of what it should look like displayed on the shelf. You can associate stores with images of the store front or interior. For more information, see [Images](#).
- **Format** – Opens the Format dialog box. In the Format dialog box, you can set and clear formats that apply to measures or dimensions. You can make changes to single or multiple measures and dimensions and apply those changes across one, many, or all views in the workbook. For more information, see [Formatting](#).
- **Save Format** –Enables you to save the workbook format to be used in the future. Formats can be saved at one of the following levels: **For Just Me**, **For [My Group]**, or **For Everyone**.
- **Delete Format** – Enables you to delete a workbook format. It can be deleted at one of the following levels: **For Just Me**, **For [My Group]**, or **For Everyone**.
- **Tile Vertically** – Allows you to view multiple views by placing them side by side.
- **Tile Horizontally** – Allows you to view multiple views by placing them in rows.
- **Tile** – Allows you to view multiple views by placing them as tiles.

## Taskflow Pane

The taskflow pane appears on the left of your screen and enables you to easily navigate through the activities in the application. It provides a pre-configured business workflow organized into expandable and collapsible activities, tasks, and steps.

---

**Note:** The taskflow pane also appears when you log on to the application.

---

Each activity consists of more than one task and each task may consist of one or more steps. In the Fusion Client, each solution (spanning across multiple workbooks) is represented as a set of activities, tasks, and steps.

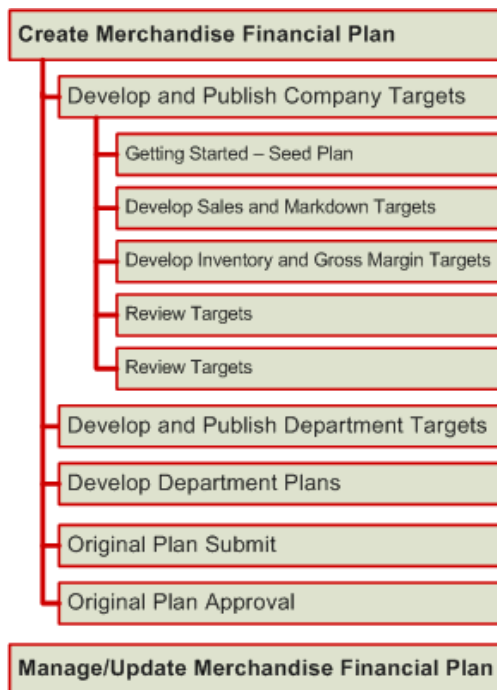
---

**Note:** The taskflow is configured for your domain during implementation. For more information on this configuration, refer to the *RPAS Configuration Tools User Guide*.

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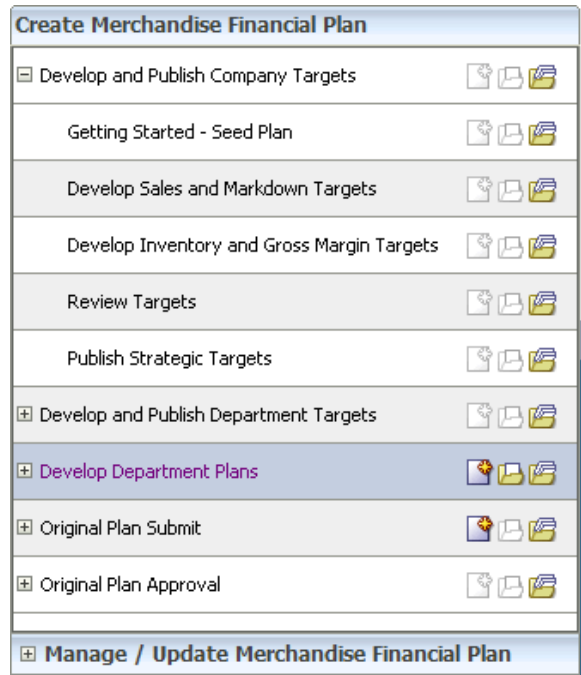
The following illustration shows an example of a solution configured with associated activities, tasks, and steps:

**Figure 2–3 Illustration of Activity, Task, and Step**



In the Fusion Client, the workflow illustrated in [Figure 2–3](#) appears in the following manner:

**Figure 2–4 Taskflow Pane**

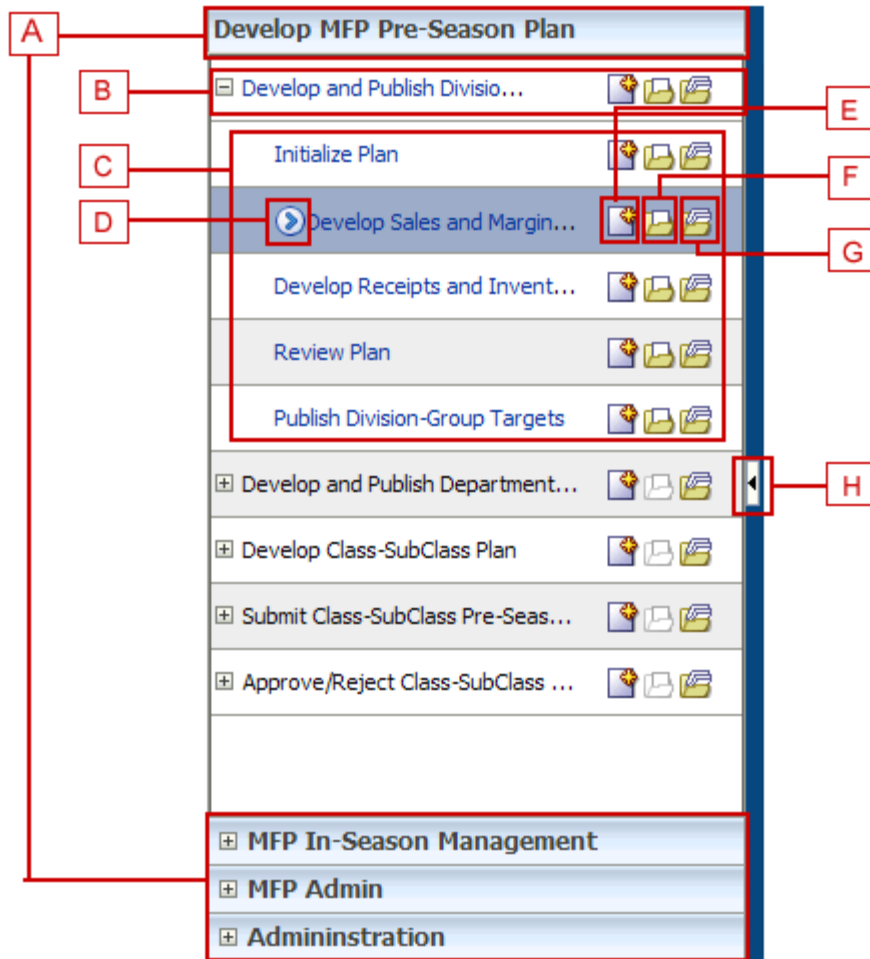


On the taskflow pane, you can click the Expand or Plus "+" icon next to any activity to view the associated tasks. When you are working with a specific step, a left arrow icon appears in the taskflow pane indicating the current step and your position in the workflow.

The Create New Workbook, Open Latest Workbook, and Show List of Workbooks icons that appear next to each task or step enable you to create new workbooks or open existing workbooks. You can find more information on creating new workbooks and opening existing workbooks in [Chapter 1, "Getting Started"](#).

The following figure illustrates the icons that appear in the taskflow:

**Figure 2–5 Icons in the Taskflow Pane**



The following table describes the icons that appear with all the entries in the taskflow:

**Table 2–3 Description of Icons in the Taskflow Pane**

Legend	Icon Name	Description
A	Activities	These tabs represent the predefined activities of the application.
B	Tasks	These are individual tasks within an activity.
C	Steps	One or more steps make up each task.
D	Current Position Icon	Indicates the current step and your position in the workflow.
E	Create a New Workbook	Click this icon to create a new workbook. The new workbook wizard associated with the relevant task appears.
F	Open the Latest Workbook	Click this icon to view the latest workbook (associated with the relevant task/step) you worked on.

**Table 2–3 (Cont.) Description of Icons in the Taskflow Pane**

Legend	Icon Name	Description
<b>G</b>	Show List of Workbooks	<p>Click this icon to view a list of all workbooks (associated with the relevant task/step) accessible to you. The Open Workbook window appears with a list of accessible workbooks.</p> <p>If you do not own any workbooks that you own, a message appears allowing you to view all workbooks.</p> <p>In case there are no workbooks associated with the task/step, created by you or by someone else, a message appears that allows you to create a new workbook.</p>
<b>H</b>	Collapse/Restore Icon	Click this icon to collapse or restore the taskflow pane. This allows you to view more content in the Contents area.

## Access Based Visibility

The activity and tasks that appear in the taskflow pane are access-based. Depending upon the security settings, you may not have access to some tasks or activities. Access to a task is defined by whether you have access to the workbook template that the task is assigned to.

The access to the workbook template is maintained in the Security Administration step. See the *RPAS Administration Guide for the Fusion Client* for more information about the Administration activity. If you do not have access to a workbook template, then you are not able to build the workbooks for the associated tasks and steps.

Hiding specific tasks or activities based on user access is configurable. In the configuration, a task can be set to either hidden or disabled. If it is hidden and the user does not have access to it, then the task is not displayed. If it is disabled and the user does not have access, then the task is displayed but the links to access the workbooks are disabled. For more information, refer to the *RPAS Configuration Tools User Guide*.

## Switching Between Multiple Tasks

When working within multiple steps or tasks, all changes you make in a specific step are maintained when you move to a step in the same task or a different task associated with the same workbook template. In this case, you do not need to save your work when you switch between tasks within the same workbook template.

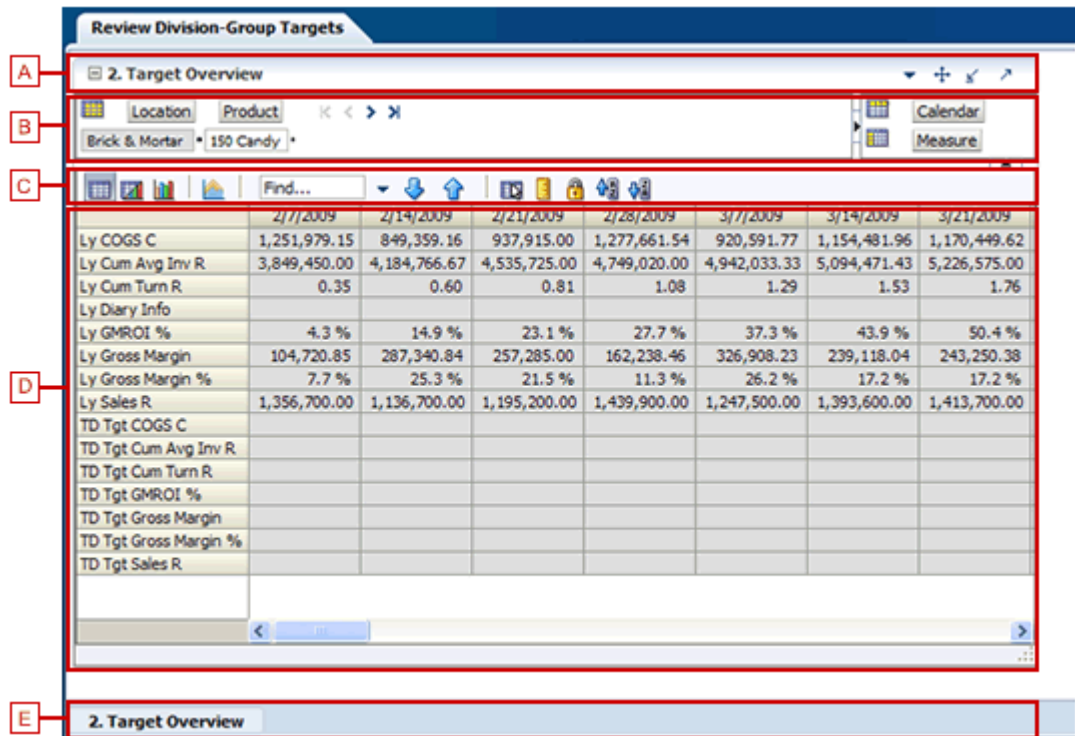
If you switch to a task that is associated with a different workbook template, you are prompted to save or discard the changes before opening or building a new workbook. To save your changes, use the Save As dialog box. For more information on the Save As dialog box, see [Save As Option](#).

## Contents Area

The Contents area appears on the center of your screen and includes the views associated with each step within the business workflow. It provides spreadsheet-like views that display multidimensional data. Each view includes a set of measures relevant to the step that help you view, analyze information, and take decisions.

The following figure shows the various components in the Contents area:

**Figure 2–6 Content Area Components**



The following table describes the components highlighted in the figure above:

**Table 2–4 Components in the Contents Area**

Legend	Area Name	Description
A	View Title Bar	Displays the name of the step and also includes view-level features such as Minimize, Maximize, Restore, and other View Options. See <a href="#">View Title Bar</a> for more information.
B	Page Edge and Dimension Tiles Area	Enables you to move or swap individual dimensions to view the information in a more effective manner. See <a href="#">Page Edge and Dimension Tiles Area</a> for more information.
C	View Toolbar	Provides quick access to view-level formatting, exporting, and charting options. See <a href="#">View Toolbar</a> for more information.
D	View Area	Displays a Pivot Table/Grid with the multidimensional data organized based on the dimension position set up in the Page Edge and Dimension Tiles area. See <a href="#">View Area</a> for more information.

**Table 2-4 (Cont.) Components in the Contents Area**

Legend	Area Name	Description
E	<a href="#">Views Docking Area</a>	Displays the views available in the current step and helps you manage any additional copies of the existing views that you may create. See <a href="#">Views Docking Area</a> for more information.

## View Title Bar

The View Title bar appears on the top of each view and displays the view name. It enables you to perform the following view-level actions:

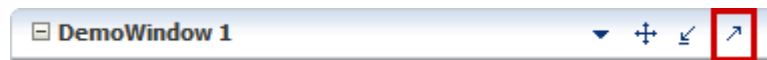
- [Maximizing or Restoring a View](#)
- [Minimizing a View](#)
- [Moving a View](#)
- [Renaming a View](#)
- [Making a Copy of a View](#)
- [Deleting a View](#)

### Maximizing or Restoring a View

To maximize a view:

- On the View Title bar, click the **Maximize** icon. This icon is the arrow that points towards the top-right, see [Figure 2-7](#).

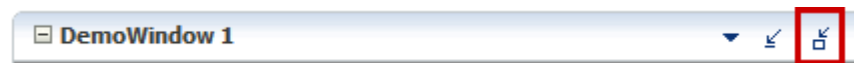
**Figure 2-7 Maximize Icon on the View Title Bar**



To restore a maximized view to its original size:

- On the View Title bar, click the **Restore** icon. This icon is the arrow with a box that points towards the bottom-left, see [Figure 2-8](#).

**Figure 2-8 Restore Icon on the View Title Bar**

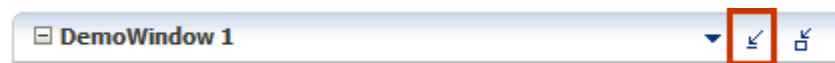


### Minimizing a View

To minimize a view:

- On the View Title bar, click the **Minimize** icon. This icon is the arrow with an underline that point towards the bottom-left, see [Figure 2-9](#).

**Figure 2-9 Minimize Icon on the View Title Bar**



A minimized view is shown with a restore icon to the left of the view name. To restore the view, you must click the view in the Views Docking Area.

### Moving a View

To move a view:

1. On the View Title bar, click the **Move** icon on the view you want to move. This icon is the cross hair that appears to the left of the Minimize icon, see [Figure 2–10](#).

**Figure 2–10 Move Icon on the View Title Bar**



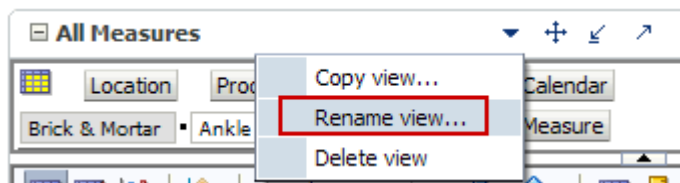
2. Drag and drop the view to the location you want. You can move this view only within the Contents area. When you try moving a view to a location out of the Contents area, the view auto fits to the nearest valid space.

### Renaming a View

To rename a view:

1. On the View Title bar, click the **View Options** icon. The **View Options** menu appears.
2. In the **View Options** menu, click **Rename view**.

**Figure 2–11 Rename View Option in the View Options Menu**



A **Rename View** dialog box appears.

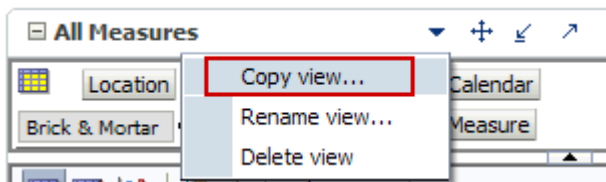
3. In the **Rename View** dialog box, enter the new view name, and click **OK**.

### Making a Copy of a View

To make a copy of a view:

1. On the View Title bar, click the **View Options** icon. The **View Options** menu appears.
2. In the **View Options** menu, click **Copy view**.

**Figure 2–12 Copy View Option in the View Options Menu**



A **Copy View** dialog box appears.

3. In the **Copy View** dialog box, enter or accept the new view name, and click **OK**.

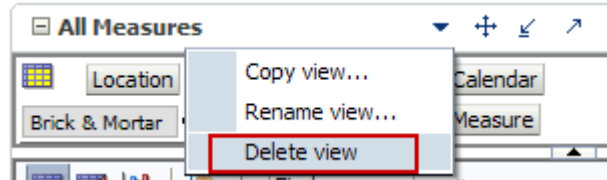


## Deleting a View

To delete a view:

1. On the View Title bar, click the **View Options** icon. The **View Option** menu appears.
2. In the **View Options** menu, click **Delete view**.

**Figure 2–13** Delete View Option in the View Options Menu



A warning message appears.

3. Review the warning message and click **Delete** to remove the view.

---

**Note:** Deleting a view removes the view from the user interface permanently.

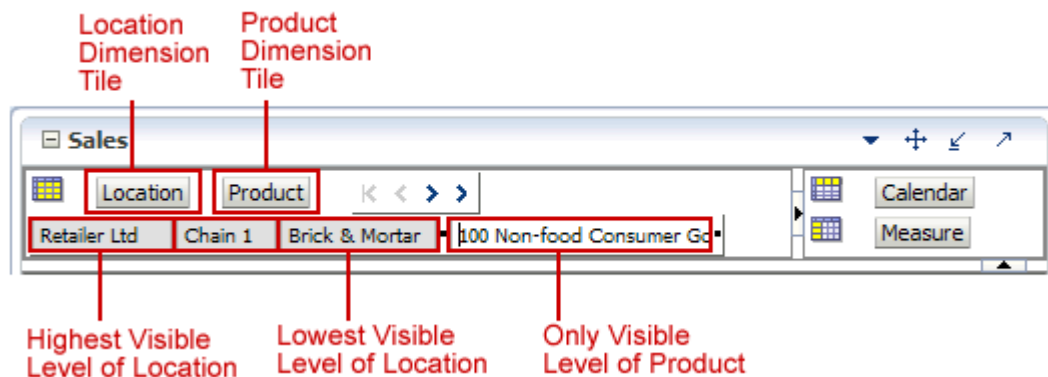
---

## Page Edge and Dimension Tiles Area

The Page Edge area appears on top of the View area and displays the dimensions on the page edge axis with its current position in the dimension. The Dimension Tiles area displays the dimensions, as tiles, that appear in the row and column axes.

On the Page Edge, the current position appears below the dimension name, horizontally with the highest visible level on the left to the lowest visible level on the right. You can hover the mouse cursor over the position to view the name of the level (displayed as a tool tip).

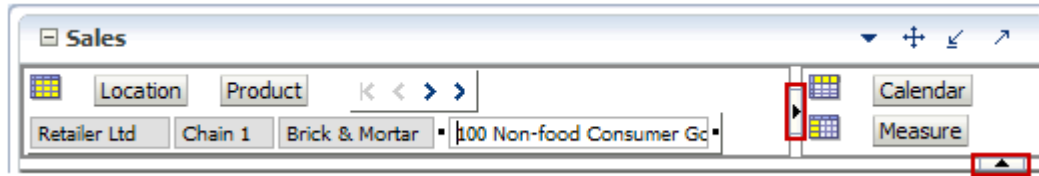
**Figure 2–14** Page Edge Displaying the Current Position



When you open the workbook for the first time, the first position in each visible level is visible. In an existing workbook, the positions retain the last saved values.

You can collapse or restore the Page Edge and Dimension Tiles area to fit more view content. You can also drag these icons to resize this area. The following figure shows the Collapse Pane icon that enables you to resize or collapse the Page Edge and Dimension Tiles area:

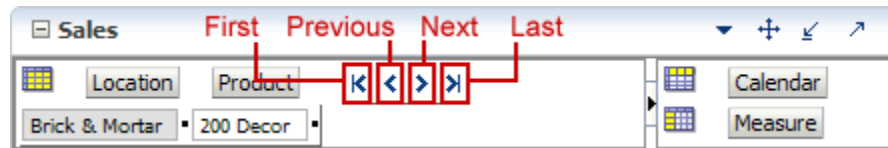
**Figure 2–15 Collapse and Restore Icons in the Page Edge and Dimension Tiles Area**



### Understanding Paging/Position Navigation

On the Page Edge area, you can select any position displayed and page through or navigate the positions using the navigation buttons (**First**, **Previous**, **Next**, **Last**) available next to the dimension tiles. In the view, data relevant to each position is displayed when you navigate to a new position in a level.

**Figure 2–16 Paging Navigation Buttons**



The **First** button enables you to navigate to the first visible position within the level that is selected. When you are at the first position, the First and Previous buttons are disabled and appear greyed out.

The **Last** button enables you to navigate to the last visible position within the level that is selected. When you are at the last position, the Next and Last buttons are disabled and appear greyed out.

The **Previous** and **Next** buttons enable you to navigate to the previous and next position in the level that is selected. The position to which you navigate to depends on the current position. When you navigate to a new position, all associated positions at the higher and lower visible levels of the same dimension are updated recursively.

---

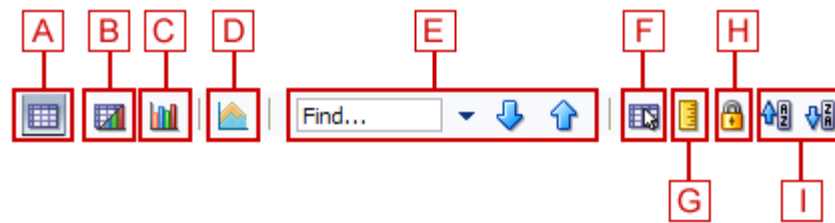
**Note:** You can also pivot or rotate the dimensions between the Page Edge, Tiles, and View areas to rearrange the orientation. For more information, see [Rotating or Pivoting Dimensions](#).

---

## View Toolbar

The View Toolbar appears within the View area, above the grid. It displays several tools that you can use to manipulate the view.

**Figure 2–17 View Toolbar**



The following table describes the components highlighted in the figure above:

**Table 2–5 Components in the Contents Area**

Legend	Area Name	Description
A	Switch to Pivot Table View icon	When in the chart view, this icon enables you to switch to the pivot table view. For more information, see <a href="#">Viewing Charts</a> .
B	Switch to Split View icon	Allows you to see the pivot table and chart in two vertical panels simultaneously in the same view. For more information, see <a href="#">Viewing Charts</a> .
C	Switch to Chart View icon	When in the pivot table view, this icon enables you to switch to the chart view. For more information, see <a href="#">Viewing Charts</a> .
D	Select Chart Type icon	Allows you to select which type of chart you would like to view the data in. For more information, see <a href="#">Viewing Charts</a> .
E	Find field, Find Options, Previous and Next Arrows	These tools enable you to search for words, partial words, or phrases within the rows, column, and page axis of an active view. The search does not include the data within the view. For more information, see <a href="#">Find from the View Toolbar</a> .
F	Selection Options icon	The option allows you to select the data that is shown in the chart. You can choose <b>Select All</b> or any other option it presents. <b>Select All</b> finds the full extent of the pivot table edges (in slices) and sets a new selection range to encompass the entire pivot table. This action triggers a refresh of the pivot table.
G	Measure Profile icon	Allows you to select, save, or delete measure profiles. See <a href="#">Measure Profiles</a> for more information.
H	Lock icon	Protects cells, measures, and positions from being edited. For more information, see <a href="#">Locking and Unlocking</a> .
I	Sort Ascend and Sort Descend icons	Allows you to sort positions in a dimension. The positions are sorted based on the values of a measure's slice for that dimension. For more information, see <a href="#">Simple Sort</a> .

## View Area

The View area includes the multidimensional pivot table that display information for the relevant task. Each task may include more than one view, and each view may appear in the Contents area in the form of tabs. The information in the view is organized based on the dimension positions set up at the Page Edge, row, and column axes.

The Fusion Client enables you to work with the data within the view. It also enables you to manage the way the information is presented in a view. You can arrange and present the information in a layout you want by rotating or pivoting dimensions across the axes, changing the data roll ups, or showing or hiding measures. You can view the information at a low level of detail or aggregate to view the information at summary levels. You can also choose to present the information in many types of charts using the charting functionality.

### Outline View vs. Block View

Along the row and column axes, you can view the data within the view in one of the following ways:

- Block View enables you to display the data at one dimensional level at a time (with the lowest level currently expanded in the grid). The following figure illustrates the block view:

**Figure 2–18 Illustration of the Block View**

all [Pr...	1000 Fa...	1310 Footwear ...	10000009 Leathe...	10000010 Leather Loafer - Black 6 B	0.0	0.0	0.0	0.0
				10000011 Leather Loafer - Black 6.5 B	0.0	0.0	0.0	0.0
				10000012 Leather Loafer - Black 7 B	0.0	0.0	0.0	0.0
				10000013 Leather Loafer - Black 7.5 B	0.0	0.0	0.0	0.0
				10000014 Leather Loafer - Black 8 B	0.0	0.0	0.0	0.0
				10000015 Leather Loafer - Black 8.5 B	0.0	0.0	0.0	0.0
				10000016 Leather Loafer - Black 9 B	0.0	0.0	0.0	0.0
				10000017 Leather Loafer - Black 9.5 B	0.0	0.0	0.0	0.0

- Outline View enables you to view the data at multiple dimensional levels at the same time, removing the need for you to collapse lower-level dimensions to see aggregate totals for higher levels. The following figure illustrates the outline view:

**Figure 2–19 Illustration of the Outline View**

	RminD	RTE	RTRxxxxxxxxxxxx	RminE
all [Product]	0.0	0.0	0.0	0.0
1000 Fashion	0.0	0.0	0.0	0.0
1300 Footwear	0.0	0.0	0.0	0.0
1310 Footwear Women's*	0.0	0.0	0.0	0.0
1312 Casual*	0.0	0.0	0.0	0.0
122 Loafer	0.0	0.0	0.0	0.0
10000009 Leather Loafer - Black	0.0	0.0	0.0	0.0
10000010 Leather Loafer - Black 6 B	0.0	0.0	0.0	0.0
10000011 Leather Loafer - Black 6.5 B	0.0	0.0	0.0	0.0
10000012 Leather Loafer - Black 7 B	0.0	0.0	0.0	0.0
10000013 Leather Loafer - Black 7.5 B	0.0	0.0	0.0	0.0
10000014 Leather Loafer - Black 8 B	0.0	0.0	0.0	0.0
10000015 Leather Loafer - Black 8.5 B	0.0	0.0	0.0	0.0
10000016 Leather Loafer - Black 9 B	0.0	0.0	0.0	0.0
10000017 Leather Loafer - Black 9.5 B	0.0	0.0	0.0	0.0

To switch between the outline and block views, right click the header of the axis whose view you want to change, and select the relevant view option.

### Rotating or Pivoting Dimensions

In the View area, you can rotate or pivot the dimensions across the axes to display data in different orientations. In the Fusion Client, you can pivot the dimensions (in both outline and block views) between the view, tiles, and page edge in the following two ways:

- Pivot Move – Moves a dimensional layer to another position on an axis.
- Pivot Swap – Swaps a dimension with another dimension on the axis.

**Note:** When a dimension is swapped or moved to the page edge for the first time, the first position within the dimension is displayed in the page edge and the data for that position is shown in the view. When a dimension that has already been on the page edge during the current session is returned to the page edge, the position that was last displayed in the page edge during previous time is shown.

To perform a pivot move:

1. From the row or column edge, click and hold down on the dimension you want to move.
2. Drag the layer next to the layer you want, and release the mouse button to move the layer.

**Figure 2–20 Example of a Pivot Move Action**

Store [ Label ]		RminD	RTE	RTRxxxxxxxxxxxx	RminE
0102 STRASBOURG	10000010 Leather Loafer - Black 6 B	0.0	0.0		0.0 0.0
	10000011 Leather Loafer - Black 6,5 B	0.0	0.0		0.0 0.0
	10000012 Leather Loafer - Black 7 B	0.0	0.0		0.0 0.0
	10000013 Leather Loafer - Black 7,5 B	0.0	0.0		0.0 0.0
	10000014 Leather Loafer - Black 8 B	0.0	0.0		0.0 0.0
	10000015 Leather Loafer - Black 8,5 B	0.0	0.0		0.0 0.0
	10000016 Leather Loafer - Black 9 B	0.0	0.0		0.0 0.0
0144 FRANKFURT	10000017 Leather Loafer - Black 9,5 B	0.0	0.0		0.0 0.0
	10000010 Leather Loafer - Black 6 B	0.0	0.0		0.0 0.0
	10000011 Leather Loafer - Black 6,5 B	0.0	0.0		0.0 0.0
	10000012 Leather Loafer - Black 7 B	0.0	0.0		0.0 0.0
	10000013 Leather Loafer - Black 7,5 B	0.0	0.0		0.0 0.0
	10000014 Leather Loafer - Black 8 B	0.0	0.0		0.0 0.0
	10000015 Leather Loafer - Black 8,5 B	0.0	0.0		0.0 0.0
0152 ROME - ITALY	10000016 Leather Loafer - Black 9 B	0.0	0.0		0.0 0.0
	10000017 Leather Loafer - Black 9,5 B	0.0	0.0		0.0 0.0
	10000010 Leather Loafer - Black 6 B	0.0	0.0		0.0 0.0
	10000011 Leather Loafer - Black 6,5 B	0.0	0.0		0.0 0.0
	10000012 Leather Loafer - Black 7 B	0.0	0.0		0.0 0.0
	10000013 Leather Loafer - Black 7,5 B	0.0	0.0		0.0 0.0

To perform a pivot swap:

1. From the row or column edge, click and hold down the dimension you want to swap.
2. Drag the layer over the layer you want to swap, and release the mouse button to swap the layer.

**Figure 2–21 Example of a Pivot Swap Action**

	Store [ Label ]	RminD	RTE	RTRxxxxxxxxxxx	RminE
10000010 Leather Loafer - Black 6 B	0102 STRASBOURG	0.0	0.0	0.0	0.0
	0144 FRANKFURT	0.0	0.0	0.0	0.0
	0152 ROME - ITALY	0.0	0.0	0.0	0.0
	0156 LIVERPOOL	0.0	0.0	0.0	0.0
	0160 MANCHESTER	0.0	0.0	0.0	0.0
	0190 OSLO	0.0	0.0	0.0	0.0
	0199 LUXEMBOURG	0.0	0.0	0.0	0.0
	0231 HELSINKI	0.0	0.0	0.0	0.0
	0242 BIRMINGHAM	0.0	0.0	0.0	0.0
	0296 BORDEAUX	0.0	0.0	0.0	0.0
10000011 LUXEMBOURG 0199 - Black 6.5 B	0102 STRASBOURG	0.0	0.0	0.0	0.0
	0144 FRANKFURT	0.0	0.0	0.0	0.0
	0152 ROME - ITALY	0.0	0.0	0.0	0.0
	0156 LIVERPOOL	0.0	0.0	0.0	0.0
	0160 MANCHESTER	0.0	0.0	0.0	0.0
	0190 OSLO	0.0	0.0	0.0	0.0
	0199 LUXEMBOURG	0.0	0.0	0.0	0.0
	0231 HELSINKI	0.0	0.0	0.0	0.0
	0242 BIRMINGHAM	0.0	0.0	0.0	0.0
	0296 BORDEAUX	0.0	0.0	0.0	0.0

**Note:** You can also perform these similar actions to switch dimensions between the Views, Page Edge, and Dimension Tiles areas.

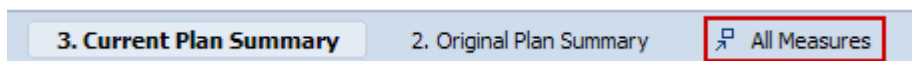
## Views Docking Area

The Views Docking Area displays all the views configured within the tab. It enables you to easily navigate to a view that is not in sight. When a view gets behind other views, you can click the specific view name in the Views Docking Area to bring that view back to the front.

When you minimize a view, the view gets minimized to the Views Docking Area. A minimized view is shown with a Restore icon to the left of the view name. To restore a minimized view, you must click the view in the Views Docking Area.

The following figure shows a Views Docking Area of a tab with three views:

**Figure 2–22 Example of a Views Docking Area with Three Views**



In the example above, the *Current Plan Summary* is the current view that is visible and this active view is highlighted in light blue in the Views Docking Area. The *Original Plan Summary* view is hidden behind *Current Plan Summary* and the *All Measures* view is minimized. The minimized view *All Measures* appears with a **Restore** icon next to the view name in the Views Docking Area.

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## Working With Workbooks

This chapter describes the various tasks you can perform with the data in the workbooks. It includes the following sections:

- [Saving Workbooks](#)
- [Renaming Workbooks](#)
- [Calculating Workbooks](#)
- [Refreshing Workbooks](#)
- [Committing Workbooks](#)
- [Modifying Workbook Data](#)
- [Showing/Hiding Levels](#)
- [Expanding and Collapsing Levels](#)
- [Showing/Hiding Positions](#)
- [Showing/Hiding/Reordering Measures](#)
- [Measure Profiles](#)
- [Synchronized Page Edge Scrolling](#)

## Saving Workbooks

On the workbook screen, you can edit the cells in the pivot table, change the layout of views, and so on. The **Save** and **Save As** options enable you to save such workbook changes.

The **Save** option is available in the File menu and also as an icon on the toolbar. The **Save As** option is available only in the File menu.

Each time you save the workbook, the workbook is first automatically calculated before the changes are saved. If the calculate or save operation fails, an error message appears.

To save a workbook:

- Once you perform the changes you want, click the **Save** icon on the toolbar.

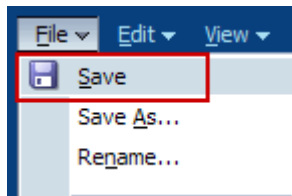
**Figure 3–1 Save Icon on the Toolbar**



Or

- From the File menu, click **Save**.

**Figure 3–2 Save Option in the File Menu**





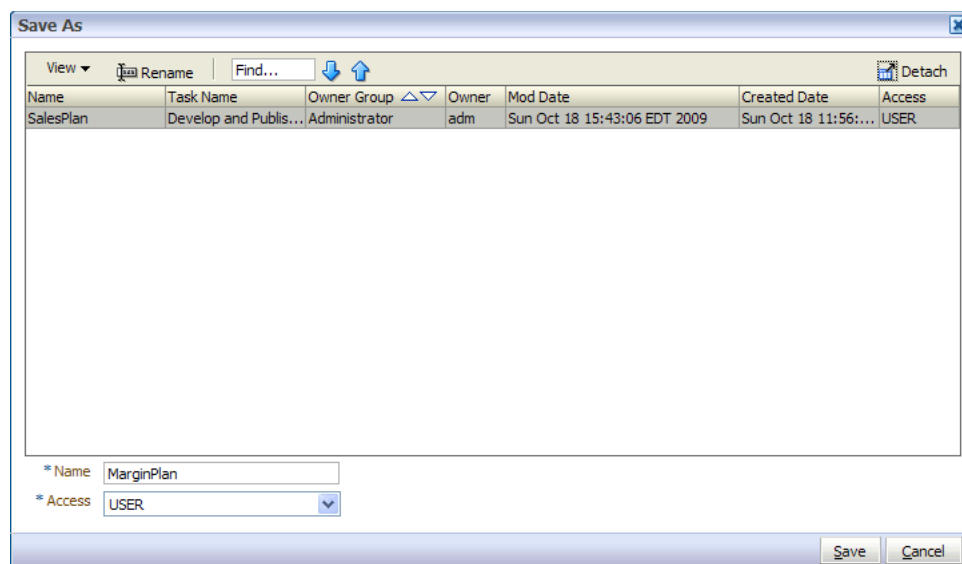
## Save As Option

The File menu also includes a **Save As** option that enables you to save a copy of the workbook. It also enables you to set the access privileges for the workbook.

To save a copy of the workbook:

1. Once you have the workbook ready, from the File menu, click **Save As**. The **Save As** dialog box appears.

**Figure 3–3 Save As Dialog Box**



2. In the **Save As** dialog box, enter appropriate details in the following fields:
  - **Name** – The name of the workbook.
  - **Access** – The access privilege to be set for the workbook. Select one of the following options:
    - **User:** This is the default option. Select this option if you want this workbook accessible only to you.
    - **[Group Name]:** Select a group if you want to allow access to all users in that group, who have access to this workbook template.
    - **World:** Select this option if you want to allow access to all the users set up for the application, who have access to this workbook template.
3. Click **Save**.

By default, the Name and Access fields retain the values set for the workbook that were saved previously. You can also select a different workbook from the list and then update it to make it a unique name.

### Auto-Save

The RPAS Fusion Client has an Auto-Save workbook feature that saves a copy of an open workbook automatically. Auto-saved workbooks contain all the changes up to the last Calculate and Custom menu actions.

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**Note:** Uncalculated cell edits and formatting changes made in the previous session are not saved in the auto-saved workbooks.

---

---

The auto-save workbook feature enables you to quickly resume your work in case one of the following events occur:

- The Web browser window is closed before logging out from the RPAS Fusion Client.
- The Web browser window stops responding and closes abruptly.
- The network is disconnected or the Web server stops responding.

When one of these events occurs, an auto-save takes place and a copy of the existing workbook is made. This copy has the same name of the workbook with `_autosaved` appended.

After one of these events occurs, you should first notify your administrator. Once the issue is fixed and the servers are restored, you can open a new Web browser window, log on to your domain again, and start using the auto-saved workbook or your last saved revision of the workbook.

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**Note:** In case your implementation uses a clustered configuration and the Web server stops responding, you will be re-directed to the RPAS Fusion Client login page on another managed server that is acting as a fail-over server. You can then log on to your domain and resume work using the auto-saved workbook.

---

---

## Renaming Workbooks

When you have a workbook open, you can rename it at any time without affecting the data within the workbook or the other workbook information such as the created date, modified date, formatting information and so on.

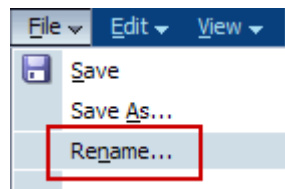
There are a few key points to know about renaming workbooks:

- You can only rename workbooks to which you have write access.
- Workbook names can be no more than 32 characters.
- Workbook names cannot contain double or single quotation marks.
- Workbooks cannot be named "Untitled." This name is reserved.

To rename a workbook, perform the following steps.

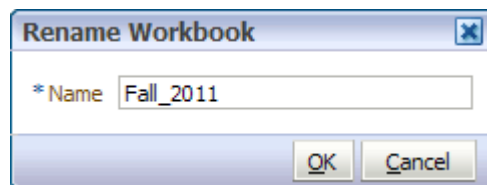
1. With the workbook open that you want to rename, select **Rename** in the File menu.

**Figure 3-4** *Rename Option in the File Menu*



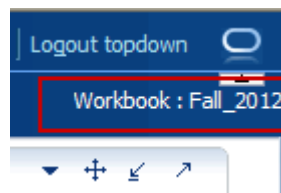
2. The Rename Workbook dialog box appears. Enter the new name of the workbook and click **OK**.

**Figure 3-5** *Rename Workbook Dialog Box*



3. The workbook refreshes and the new workbook name appears in the top, right corner.

**Figure 3-6** *Renamed Workbook*

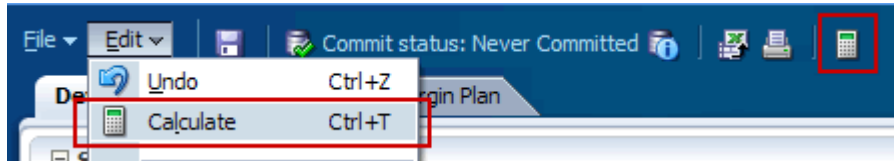


You can also rename a workbook from the Open Workbook window or the Save As window. For more information about this option, see [Renaming a Workbook](#).

## Calculating Workbooks

When you edit any cell value within a view, you must calculate the workbook to review the cells that are updated based on your action. The **Calculate** icon on the Quick Access toolbar and the **Calculate** option in the Edit menu enable you to calculate the workbook after you edit any cell value in a workbook.

**Figure 3–7 Calculate Option on the Quick Access Toolbar and Edit Menu**



When you calculate a workbook, the updated cell value is sent to the server and the associated cells are recalculated based on the calculation rules already configured.

The formatting for edited cells are removed.

---

**Note:** The **Calculate** option is disabled on the Quick Access toolbar and Edit menu when there are no changes in the workbook.

---

To calculate a workbook:

1. In the workbook, edit the cells you want. You can edit the unprotected cells only. There are some protected measures that you may not be able to edit. When you edit a cell, the formatting on the edited cell is removed.

Alternately, because of protection processing, there are cells that are protected while you are editing other cells.

2. Click the **Calculate** icon on the Quick Access toolbar.

OR

In the Edit menu, click **Calculate**.

---

**Note:** You can also calculate the workbook using the keyboard shortcut **Ctrl + T**.

---

All associated cells are calculated and the updated workbook appears. As a result of the Calculate operation, protected cells may become unprotected if they were protected as a result of a previous cell edit.

If the Calculate operation fails, an error message appears.

## Refreshing Workbooks

When you are working with a workbook, you have the ability to update it with the data that is currently stored in the domain. This allows you to work with the most current data without having to rebuild the workbook.

Workbooks can be configured to have a single refresh rule group or multiple refresh rule groups.

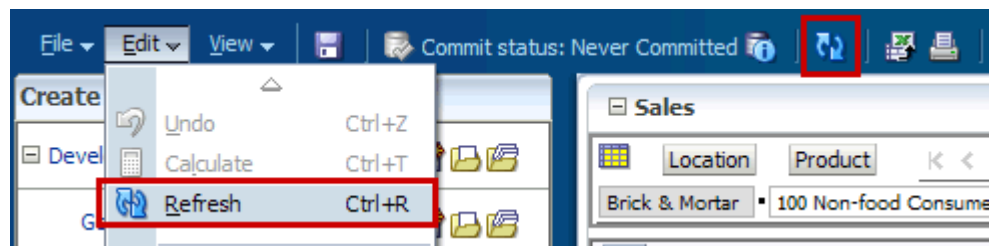
---

**Note:** If a refresh rule group does not exist for a workbook, the Refresh option is disabled.

---

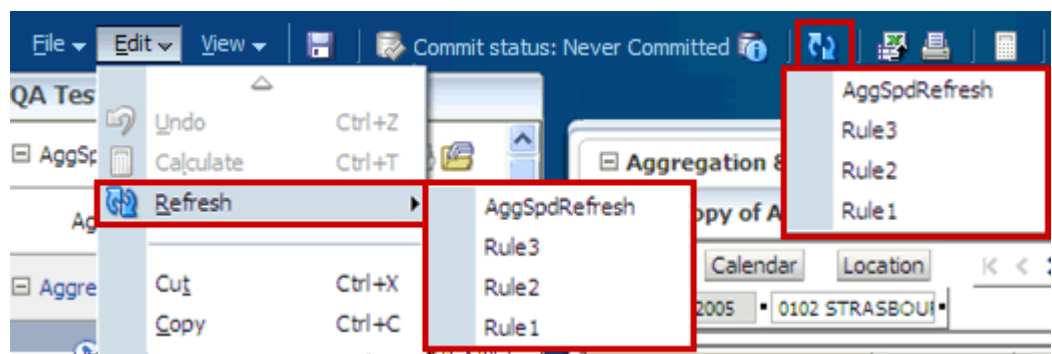
- **Single refresh rule group** - These contain refresh rules in a single rule group. This means that only one rule group is assigned as a refresh rule group in the configuration of the workbook.

**Figure 3–8 Single Refresh**



- **Multiple refresh rule groups** - Multiple refresh rule groups are set up and assigned to a workbook. When there are multiple refresh rule groups, the refresh options in the Edit menu and in the toolbar have a down arrow that shows a list of available refresh rule groups. You can choose the specific group to refresh the data in the workbook. Only one rule group can be selected or applied at a time.

**Figure 3–9 Multiple Refresh**



The refresh rule groups available for use in the Fusion Client are set up in the RPAS Configuration Tools. To learn how to create these rule groups, see the *RPAS Configuration Tools User Guide*.

When the refresh option is used, the following occurs:

- When the refresh option is invoked, the Fusion Client runs the calculation before running the refresh operation.

- The uncommitted data is lost for measures that are refreshed or calculated as a result of the refresh. If the measure is not affected by the refresh process, then the uncommitted data is not affected.
- If a locked cell has updated data in the domain, the value in the cell changes to the domain value.
- In general, all locks are ignored and the data is updated with new values from the domain.
- It is possible that elapsed time is updated as part of the refresh. When you refresh, the elapsed setting can be updated; therefore, certain periods of data may become read-only.

## Committing Workbooks

When you perform a save operation, the changes get saved to the workbook. Unless these changes are committed to the master domain, the updated information may be lost in case the workbook gets deleted or corrupted. The Commit option enables you to merge the changes you performed in the workbook to the master domain.

You can find the Commit option in the File menu and also as an icon on the toolbar. A Commit Status option is also available next to the Commit option. This option enables you to review the status of the commit requests.

To commit a workbook:

- Once you perform the changes you want, click the **Commit** icon on the toolbar.

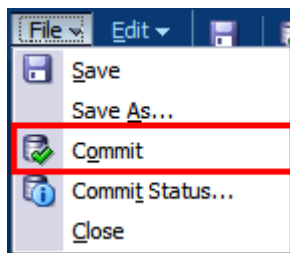
**Figure 3–10 Commit Icon on the Toolbar**



OR

- From the **File** menu, click **Commit**.

**Figure 3–11 Commit Option in the File Menu**



When you commit a workbook, a copy of the workbook is added to the commit queue, and the commit status changes to *Pending*. This status is updated at a set time interval (configurable and defaults to 30 seconds) until the status changes to *Committed*. Once the system resources are available, the changes are committed to the master domain. You can continue working on the workbook while the commit operation is in progress. You may need to commit the workbook again to update the master domain with the latest information.

The following Commit statuses are available:

- Committed – Indicates that the changes were committed successfully and no additional changes have been made.
- Modified – Indicates that the changes were made (saved or unsaved) since the last commit.
- Pending – Indicates that the changes are submitted to the queue and waiting to be processed.
- In Progress – Indicates that the changes in the workbook are being committed.
- Failed – Indicates that the changes were not committed. You may need to fix any errors in the workbook and try committing again.

---



---

**Note:** The Commit operation is similar to the Commit ASAP option in the RPAS Classic Client.

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An information icon is available next (to the right) to the Commit Status. You must hover the mouse cursor over the Commit Status icon to view the current commit status.

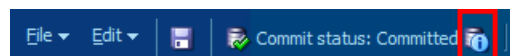
## Viewing Commit Statuses

The Commit Status dialog box enables you to view the commit statuses for all the workbooks.

To view the commit statuses:

- On the Quick Access toolbar, click the information icon placed to the right of the current Commit Status.

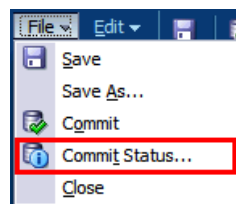
**Figure 3–12** Commit Status Information Icon



OR

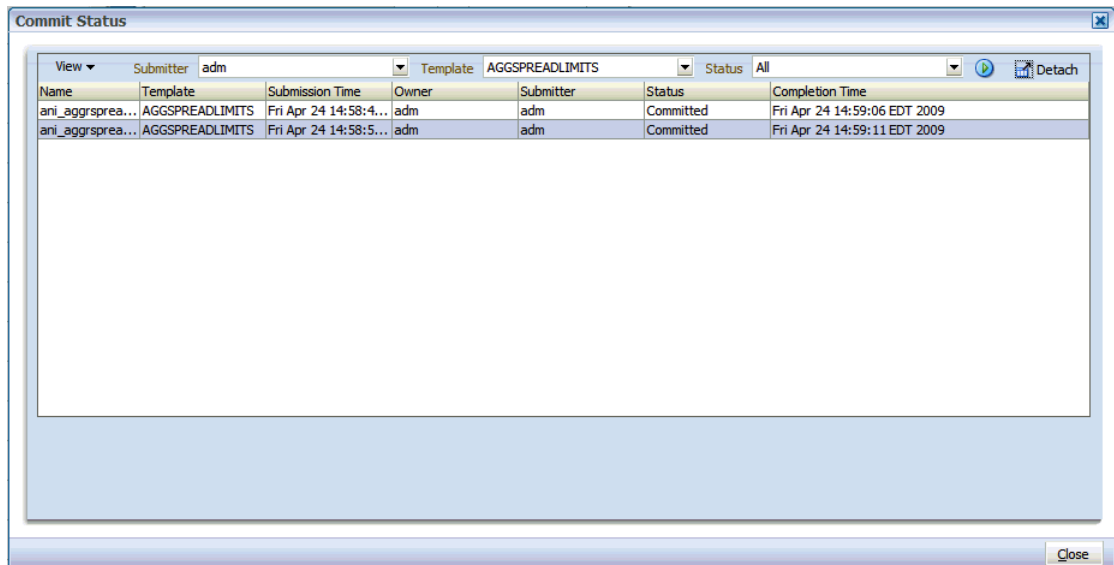
From the **File** menu, click **Commit Status**.

**Figure 3–13** Commit Status Icon on the File Menu



The Commit Status dialog box appears.

**Figure 3–14 Commit Status Dialog Box**



By default, the Commit Status dialog box lists the statuses of the current commit operations. It also enables you to filter the list by the users, templates, or status.

To view the commit status based on specific criteria:

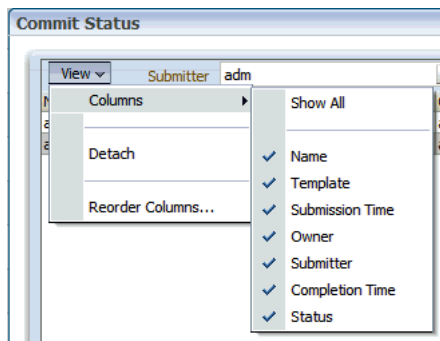
1. On the **Commit Status** dialog box, select the relevant values in the **Submitter**, **Template**, or **Status** drop-down lists.
2. Once the specific criteria is selected, click the **Refresh** icon located on the right of the **Status** drop-down list.

### Showing or Hiding Columns

By default, the Commit Status dialog box displays all the columns. To show or hide the columns you want:

1. On the **Commit Status** dialog box, click **View**.

**Figure 3–15 View Menu in the Commit Status Dialog Box**



2. On the **View** menu, select the column you want in the **Columns** sub menu.



## Reordering Columns

The Reorder Columns option in the View menu enables you to reorder the columns that appear in the Commit Status dialog box.

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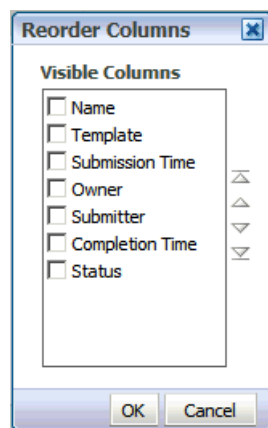
**Note:** You can also reorder the columns visible in the dialog box by dragging and dropping them to the position you want.

---

To reorder the columns:

1. On the **Commit Status** dialog box, click **View**.
2. On the **View** menu, click **Reorder Columns**. The **Reorder Columns** window appears.

**Figure 3–16** *Reorder Columns Window*



3. On the **Reorder Columns** window, select the columns you want, and click the up or down arrow buttons to reorder the columns. Click the top (first) and bottom (last) buttons to move your selection to the top or bottom of the list.
4. Click **OK**.

## Modifying Workbook Data

In the view, you can make changes to the data cells. You can make the edits by directly typing or updating a value in the cell, copying and pasting, or by importing changes from a file. You can also lock a cell value by clicking the **Lock** icon on the View toolbar. This ensures that any calculation performed during the cell edits do not affect the locked cell values.

In the Fusion Client, you can modify workbook data in the following manner:

1. Double-click on the cell you want to edit.
2. Once you enter or change the value in the cell, you can navigate to any other cell by double-clicking on that cell or using the following keyboard keys to navigate:
  - **Enter** to scroll Down.
  - **Shift + Enter** to scroll Up.
  - **Tab** to scroll Right.
  - **Shift + Tab** to scroll Left.

To learn how to modify data with math formulas, see [Modify Data with Cell Formulas](#).

## Revert Cell

After an edit action, you can revert the cell to the last calculated value using the **Revert Cell** option in the right-click context menu. The **Revert Cell** feature is on a cell-by-cell basis. When you click **Revert Cell**, the edited cell reverts to the last saved or calculated value. Changes up to the last saved or calculated value are available in the Undo list.

## Protection Processing

Protection processing is the process that makes some cells within a workbook read-only to ensure that during edits no conflicts occur within the RPAS engine in a Calculation Cycle. There are two types of protection processing:

- Measure Protection Processing - Locks cells in all the displayed views based on the measures that have been edited.
- Dimension Protection Processing - Locks cells based on the dimension intersections that have been edited.

Protection processing runs each time when a workbook with any locked cell/measure is opened, a cell is edited, a cell or measure is locked, and after each cell revert action. It runs only once when a group of cells are updated in one action. Protected cells or measures appear highlighted in a different color in the view. This is configurable feature.

## Measure Protection Processing

In Measure protection processing, cells become read-only when you make changes to enough measures. This ensures that there are no more possible changes which may cause conflicts.

For example, consider six measures (A, B, C, D, and E) set up with the following two rules:

Rule 1 -  $A = B + C$

- Rule 2 -  $B = D + E$

In this scenario, both A and B are read-only before any edits are applied. Although B appears to be editable, since there are no reciprocal expressions for B's relation to D and E, it is not editable. Measures C, D, and E, however, are editable.

Typically, rule definitions are set up to include all equivalent derivations of any expression. This ensures that you can edit all of the measures contained in any expression in the rule.

Considering the example above, Rules 1 and 2 will be configured as:

- Rule 1  $A=B+C$ ,  $B=A-C$ ,  $C=A-B$
- Rule 2  $B=D+E$ ,  $D=B-E$ ,  $E=B-D$

In this case, all measures are editable before you make any changes and the measures remain editable based on the edits you make.

Measure protection processing will lock all instances of a measure when any position of the other measures in the rule are edited.

For example, consider the Rule 1 above in a typical Product, Location, Calendar dimension.

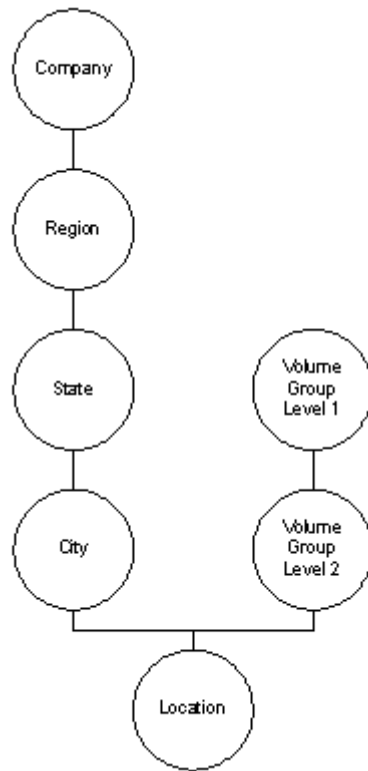
When you edit the measure B for product 1, location 1, and week 1 and measure C for product 1, location 1, and week 2, the measure A becomes read-only for all products at all locations in every week.

### Dimension Protection Processing

Changes to cells at the aggregated levels occur during a Spread action that changes values down to the base intersection of a measure. Dimension protection processing protects the intersections (combination of levels) to ensure that all changes made during the Spread do not affect such a spreading path.

Considering the typical retail dimensions, the process applies at *product:color-location:store-calendar:week* and *product:style-location:region-calendar:month*. These two intersections are on the same path from the root to leaf. If the location dimension has roots for both region/state and Store Volume, any edit to a cell in the Volume Group dimension causes all cells included in an intersection with a company/region/state/city to become read-only.

**Figure 3–17 Location Dimension Example for Dimension Protection Processing**



Dimension protection processing changes to the intersection of dimension and level are processed, and edits are allowed to cells as long as the edits are on one path from the root to the leaf level.

## Showing/Hiding Levels

Dimension levels that appear in the view are based on the configuration. Only levels configured for a view are visible in the view. In the Fusion Client, you can show or hide the levels in the following ways:

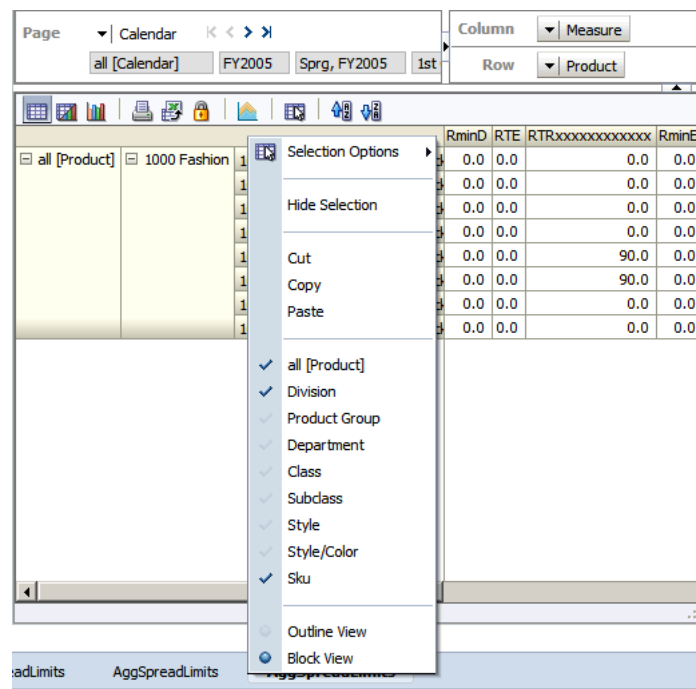
- Right-click menu
- Levels Tab in the Dimension dialog box

### Using the Right-click Menu

To show or hide levels using the right-click menu:

1. In the view, right-click anywhere in the area that displays the dimension.

**Figure 3–18 Right-click Menu**



2. Select the level you want to show or hide.

The view updates to display or hide the relevant level.

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**Note:** You can perform the same action by accessing the right-click context menu in the page edge.

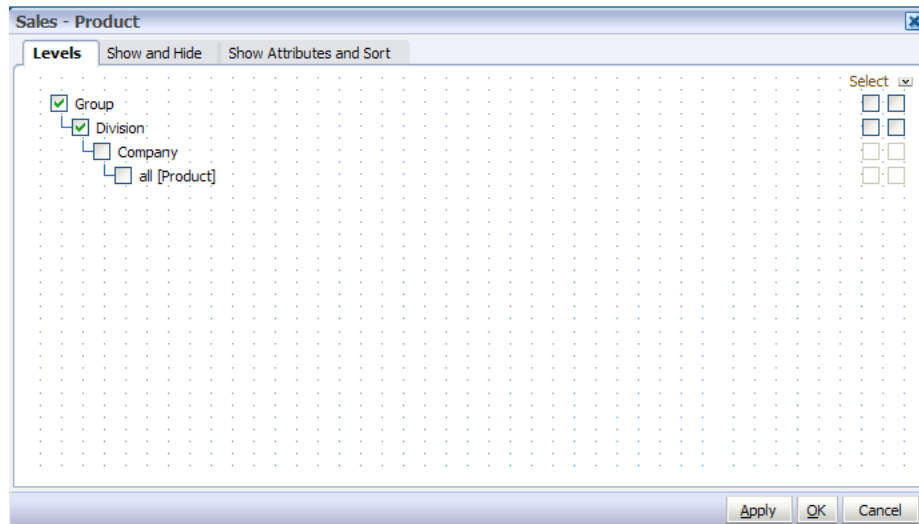
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## Using the Dimension Dialog Box

To show or hide levels using the Dimension dialog box:

1. In the page edge, click the dimension tile you want. The Dimension dialog box appears.

**Figure 3–19** *Dimensions Dialog Box, Levels Tab*



2. Click the Levels tab. The Levels tab shows all the levels and alternate roll-ups and enables you to select one or more levels within a single dimension.
3. Select the levels you want to show or hide.
4. Click **OK** to apply the changes and switch back to the view.

You can also click **Apply** to apply the changes and continue working on the other tabs.

## Expanding and Collapsing Levels

Although you can click the Expand/Collapse buttons next to each level displayed in the view, it can be tedious and time consuming if there are many levels. The Fusion Client includes the following options to help you expand/collapse levels easily:

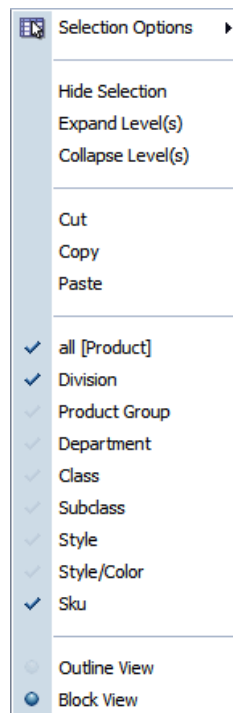
- Right-click menu
- Levels Tab in the Dimension pop-up

### Using the Right-click Menu

To expand/collapse levels using the right-click menu:

1. Select the levels you want to expand or collapse, and right-click.

**Figure 3–20** *Expand Level and Collapse Level Options in the Right-click Menu*



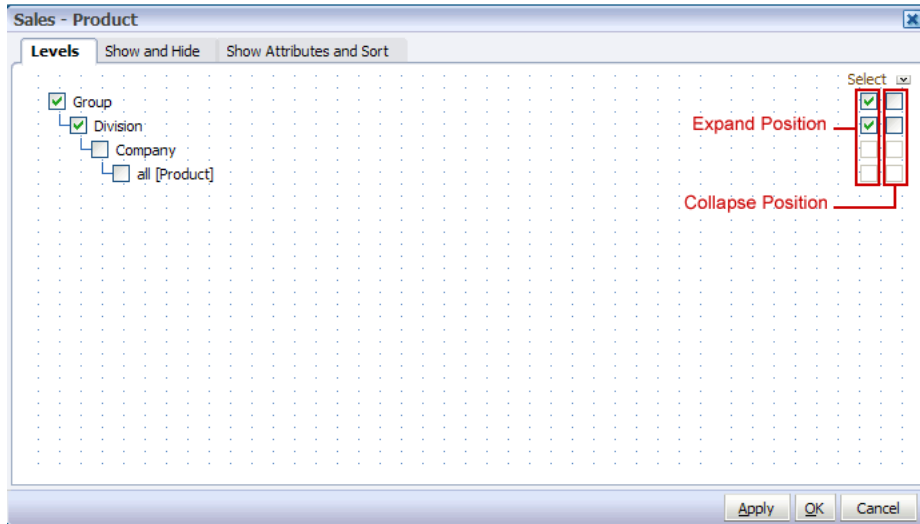
2. On the right-click menu, select **Expand Level(s)** or **Collapse Level(s)**.

## Using the Dimension Dialog Box

To expand or collapse levels using the Dimension dialog box:

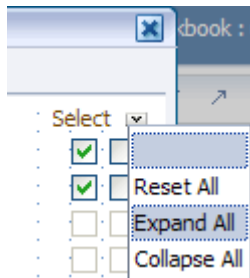
1. In the page edge, click the dimension tile of the dimension you want to collapse or expand. The Dimension dialog box appears.

**Figure 3–21 Dimensions Dialog Box, Levels Tab**



2. On the Levels tab, select the relevant check box to expand or collapse all the positions at the level. To expand or collapse all positions at all the visible levels, click the Expand/Collapse shortcut menu on the top.

**Figure 3–22 Expand/Collapse Shortcut Menu**




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**Note:** The expand/collapse check boxes are enabled only for the levels selected.

---

3. Click **OK** to apply the changes and go back to the view.  
You can also click **Apply** to apply the changes and continue working on the other tabs.



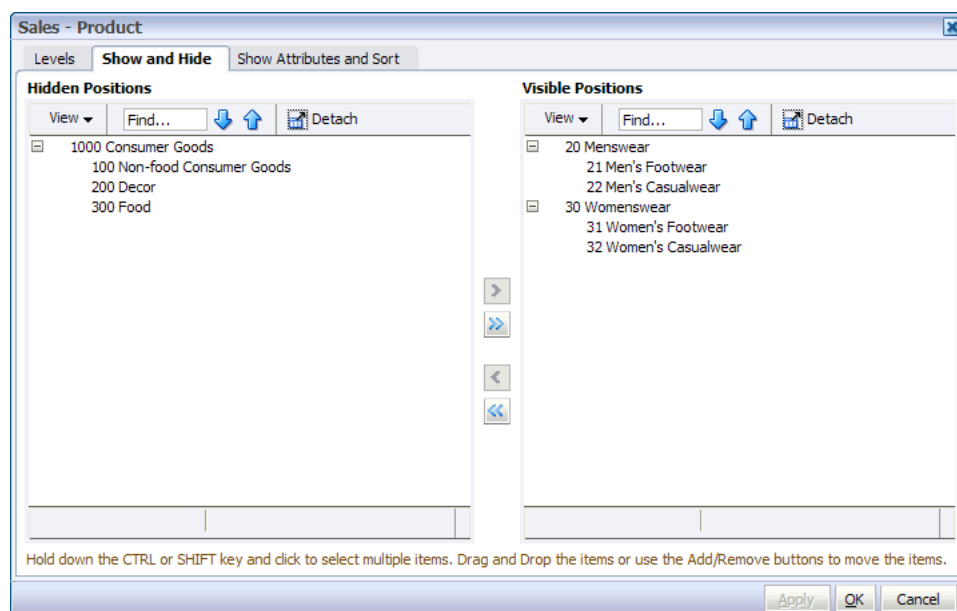
## Showing/Hiding Positions

Positions that appear in the view are based on the configuration. Only positions configured for a view are visible in the view. In the Fusion Client, you can show or hide the positions using the Dimension dialog box.

To show or hide positions:

1. In the Page Edge and Tiles area, click the dimension tile you want. The Dimension dialog box appears.
2. In the Dimension dialog box, click the **Show and Hide** tab.

**Figure 3–23** Dimension Dialog Box, Show and Hide Tab



3. Select the positions you want by holding down the CTRL or SHIFT key.
4. Click the **Add/Remove** buttons to move positions between the **Visible Positions** and **Hidden Positions** areas.

Or

Drag and drop the positions between these areas.

5. Click **OK** to apply the changes and go back to the view.

You can also click **Apply** to apply the changes and continue working on the other tabs.

Use the **Add All** and **Remove All** buttons to move all the positions between the **Visible Positions** and **Hidden Positions** area.

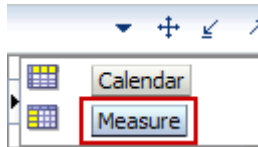
## Showing/Hiding/Reordering Measures

Measures that appear in the view are based on the configuration, and only measures configured for a view are visible in the view. In the Fusion Client, you can show, hide, or reorder the measures using the dimension dialog box.

To show or hide measures:

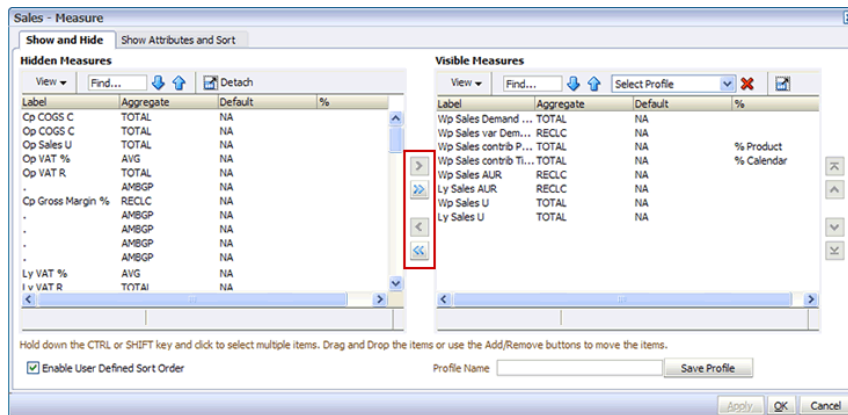
1. In the page edge, click the **Measure** tile.

**Figure 3–24 Measure Tile**



The Measure Dimension dialog box appears.

**Figure 3–25 Measure Dimension Dialog Box, Show and Hide Tab**



2. On the Show and Hide tab, select the measures you want by holding down the **Ctrl** or **Shift** key.
3. Click the **Add/Remove** buttons to move measures between the **Visible Measures** and **Hidden Measures** areas.

Or

Drag and drop the measures between these areas.

4. Click **OK** to apply the changes and go back to the view.

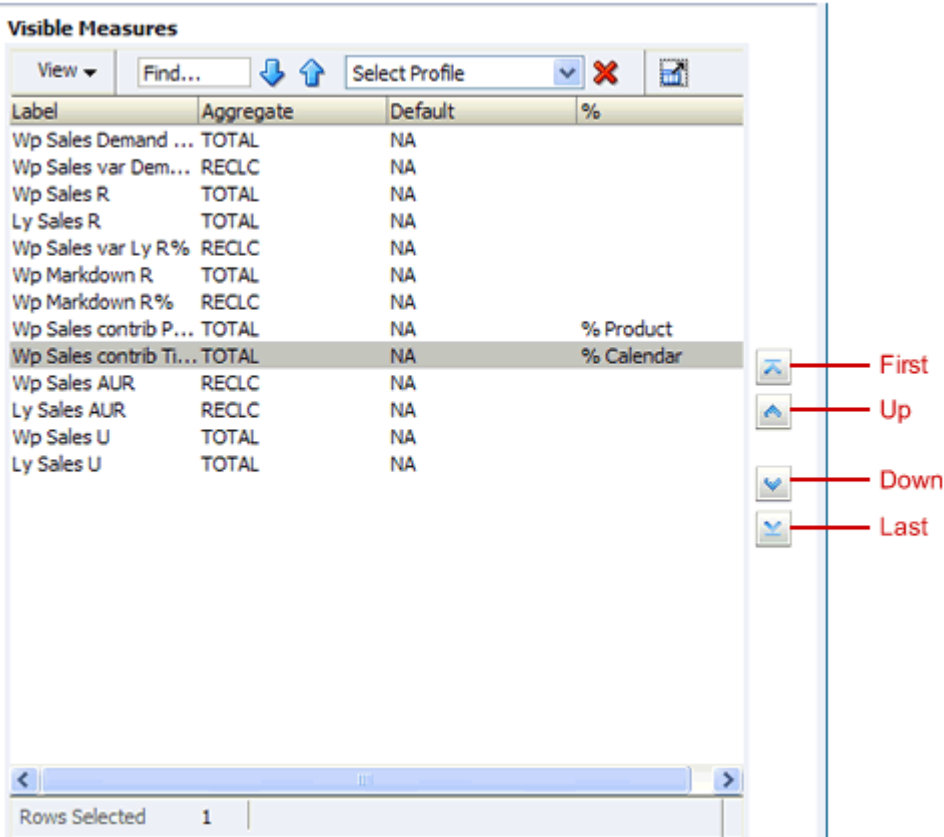
You can also click **Apply** to apply the changes and continue working on the other tabs.

Use the **Add All** and **Remove All** buttons to move all the measures between the **Visible Measures** and **Hidden Measures** area.

To reorder measures:

- On the **Show and Hide** tab, select the measures you want to reorder, and click the **First**, **Up**, **Down**, or **Last** buttons until you get the order you want.

**Figure 3–26 Measure Dimension Pop-up > Show/Hide Tab**



**Note:** Sorting the measures in the Visible Measures area does not reorder the measures in the view. To reorder the measures, use the **First**, **Up**, **Down**, and **Last** buttons.

## Measure Profiles

Measure profiles are customized groups of measures that you can create and use in views. Instead of adding or removing measures from the default measure list each time you work with a particular view, you can save that customized group of measures as a measure profile and load it into the view. By creating a measure profile for each set of measures that you frequently use, you reduce the amount of time it takes to setup a view.

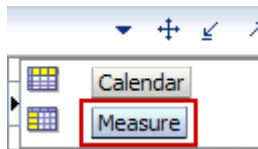
Measure profiles are created at the view level and are available in all views and copies of that view. Measure profiles are saved as part of the formatting. Depending on how you save the formatting, you can make your measure profiles available to other users. For more information, see [Formatting](#).

### Creating a Measure Profile

To create a measure profile, you first need to select the visible measures for the view. Once you have selected the measures that you want to appear in the measure profile, you can create the measure profile.

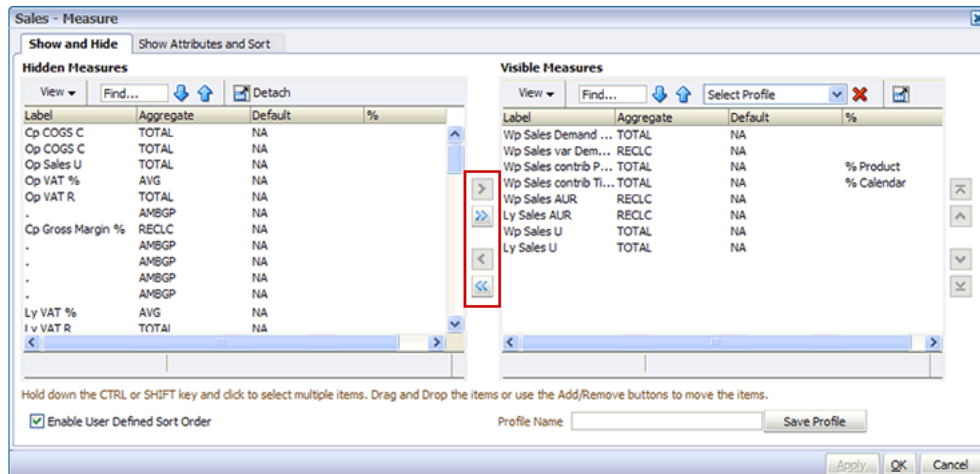
1. Open the view that you want to create a measure profile for.
2. Click the **Measure** tile.

**Figure 3–27 Measure Tile**



3. The Measure Dimension dialog box appears. On the Show and Hide tab, use the arrow buttons to move the measures to and from the Visible Measures box. Place only the measures that you want to appear in the measure profile in the Visible Measures box.

**Figure 3–28 Moving Measures to the Visible Measures Box**



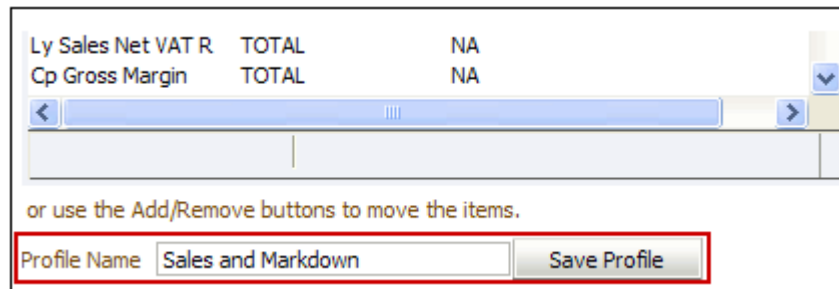
4. Adjust the order of the measures in the Visible Measure box by using the **First**, **Up**, **Down**, and **Last** arrows located to the right of the Visible Measure box. This step is optional.

5. Once all of the measures that you want to appear in the measure profile are in the Visible Measures box, you can save the measure profile using one of two methods:

**Method 1:**

- a. In the **Profile Name** field below to the Visible Measures box, enter the name of the measure profile.
- b. Click **Save Profile**.

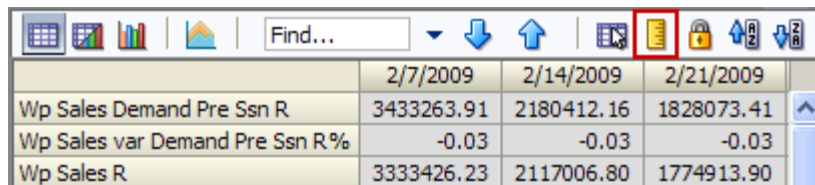
**Figure 3–29 Measure Profile Name Field**



**Method 2:**

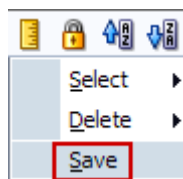
- a. Click **OK**. The Measure Dimension dialog box closes and the view is visible again. The measures that you selected to be visible are shown in the view.
- b. Click the **Measure Profile** icon in the View toolbar.

**Figure 3–30 Measure Profile Icon**



- c. The Measure Profile menu appears. Click **Save**.

**Figure 3–31 Measure Profile Menu: Save**



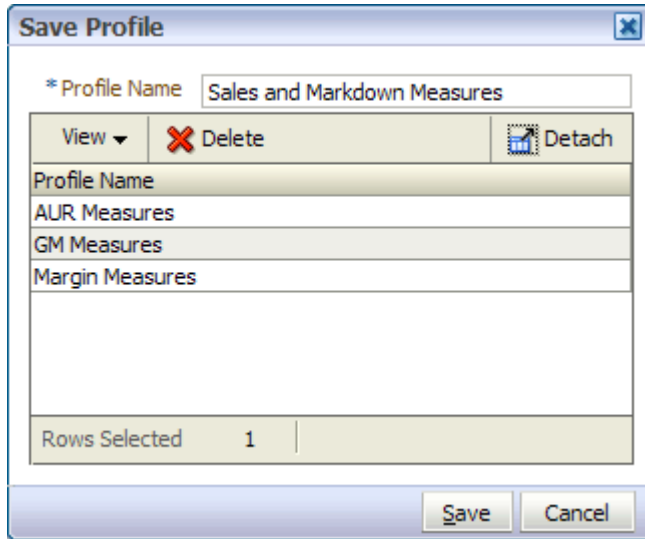
- The Save Profile dialog box appears. Enter the name of the measure profile and click **Save**.

---

**Note:** Existing measure profiles are visible in the Save Profile dialog box.

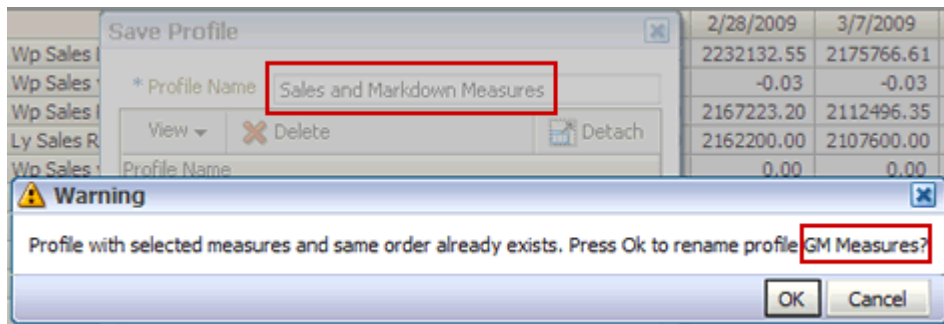
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**Figure 3–32 Save Profile Dialog Box**



Regardless of the method you use, you cannot create a measure profile that contains the same measures and order of an existing profile. If you do create a measure profile that is identical to an existing one, a warning message appears and asks if you would like to rename the existing measure profile. Click **OK** to save it with the name you entered in the **Profile Name** field. Click **Cancel** to leave it as the existing name.

**Figure 3–33 Measure Profile Warning Message**




Similarly, you cannot save a measure profile with the same name as an existing measure profile.

## Applying Measure Profiles

To apply an existing measure profile to a view, perform the following steps:

1. Click the **Measure Profile** icon in the view tool bar.

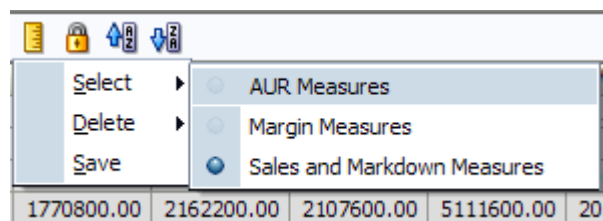
**Figure 3–34 Measure Profile Icon**



	2/7/2009	2/14/2009	2/21/2009
Wp Sales Demand Pre Ssn R	3433263.91	2180412.16	1828073.41
Wp Sales var Demand Pre Ssn R%	-0.03	-0.03	-0.03
Wp Sales R	3333426.23	2117006.80	1774913.90

2. The Measure Profile menu appears. Click **Select**.
3. A list of existing measure profiles appears next to the menu. The measure profile in use has a blue dot next to it. Click the measure profile you want to apply to the view.

**Figure 3–35 Measure Profile Menu: Select**



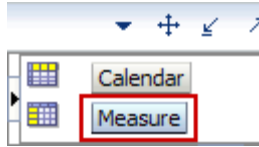
The view refreshes and the measures of the measure profile appear.

## Updating Measure Profiles

To update an existing measure profile, perform the following steps:

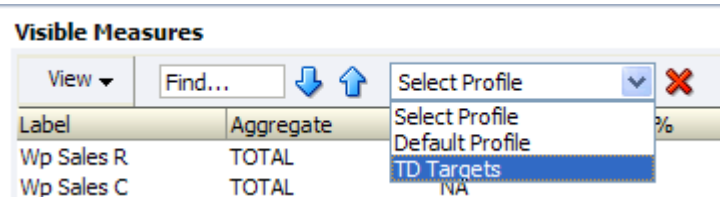
1. Click the **Measure** tile.

**Figure 3–36 Measure Tile**



2. The Measure Dimension dialog box appears. On the Show and Hide tab in the Visible Measures section, select the profile you want to update from the list.

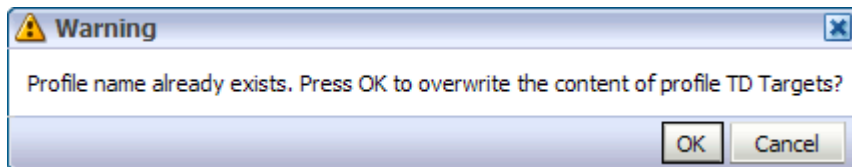
**Figure 3–37 Measure Profile List**



The Hidden Measures and Visible Measures lists are updated based on the profile selected.

3. Update the profile by adding or removing measures from the Visible Measures list.
4. When finished updating the profile, click **Save Profile**.
5. A warning message appears and asks if you want to overwrite the content of the measure profile. Click **OK**.

**Figure 3–38 Update Measure Profile Warning Message**



6. Click **OK** at the bottom of the Measure Dimension dialog box to return to the view. The measure profile is updated.




## Deleting Measure Profiles

You can delete measure profiles that you have created. However, you cannot delete the default profile. To delete an existing measure profile, use one of the following methods:

### Deleting a Measure Profile: Method 1

1. Click the **Measure Profile** icon in the View toolbar.

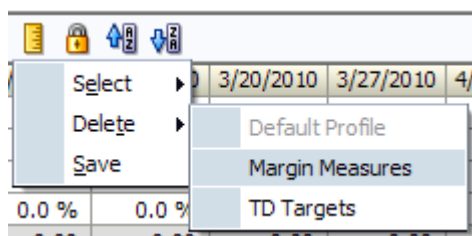
**Figure 3–39 Measure Profile Icon**



	2/7/2009	2/14/2009	2/21/2009
Wp Sales Demand Pre Ssn R	3433263.91	2180412.16	1828073.41
Wp Sales var Demand Pre Ssn R%	-0.03	-0.03	-0.03
Wp Sales R	3333426.23	2117006.80	1774913.90

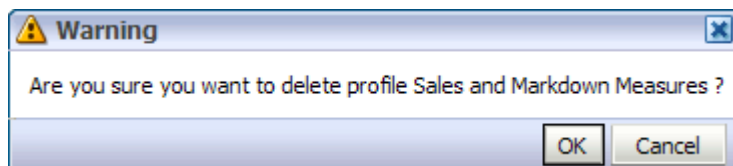
2. The Measure Profile menu appears. Click **Delete**.
3. A list of existing measure profiles appears next to the menu. Click the measure profile you want to delete.

**Figure 3–40 Measure Profile Menu: Delete**



4. A warning message appears, asking if you want to delete the profile. Click **OK**.

**Figure 3–41 Measure Profile Warning Message: Deleting Profile**



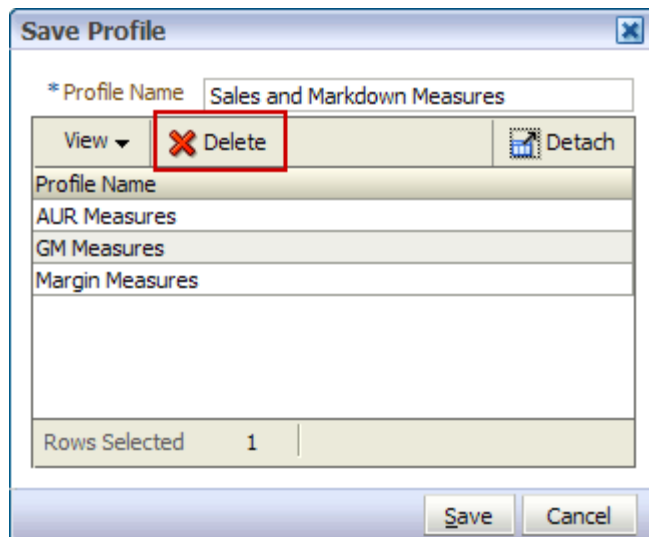
The measure profile is deleted.

### Deleting a Measure Profile: Method 2

You can also delete a measure profile from the Save Profile dialog box:

1. From the Save Profile dialog box, select the measure profile you want to delete.
2. Click **Delete**.

**Figure 3–42** *Deleting from the Save Profile Dialog Box*



3. A warning message appears, asking if you are sure you want to delete the profile. Click **OK**.

The measure profile is removed from the list.

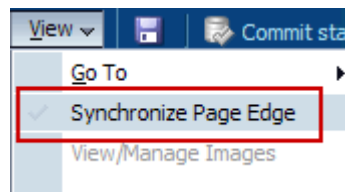
## Synchronized Page Edge Scrolling

Synchronized page edge scrolling enables you to simultaneously scroll through the page edge of multiple views. When synchronized page edge scrolling is enabled, all views that contain the same slice dimension scroll to the new slice position when one of those views is scrolled to a new position. When disabled, scrolling through slice positions in one view does not affect the slice position display of other views.

Synchronized page edge scrolling works for all views within a single workbook, and it remains enabled as you move through the tasks and steps within that workbook. Synchronized page edge scrolling is useful when you want to compare multiple views containing the same page or slice dimension.

To enable synchronized page edge scrolling, click **Synchronize Page Edge** in the View menu, as shown in [Figure 3–43](#).

**Figure 3–43 Synchronize Page Edge Option in the View Menu**



When synchronized page edge scrolling is enabled, a check mark appears by this option in the View menu. In addition, workbooks that are set at the same dimension levels are refreshed to show the same data within those levels.

**Figure 3–44 Synchronized Views**

 A screenshot showing two side-by-side views of a financial report, '1. Rec / Inv Value Plan' and '2. Rec / Inv Unit Plan'. Both views are synchronized to show data for 'Brick & Mortar' and '22 Men's Casualwear'. The data tables in both views are identical, showing various metrics like 'Wp BOS R', 'Wp Sales R', and 'Ly Sales R' across different dates.
 

	2/7/2009	2/14/2009	2/21/2009	2/28/2009
Wp BOS R				
Wp BOS U				
Wp BOS AUR				
Wp BOP Inv R	15501400.00	12362389.24	12436710.73	11911111.11
Wp Sales R	1935863.04	1715383.02	1849798.93	1811111.11
Ly Sales R	1837700.00	1628400.00	1756000.00	1711111.11
Wp Shrink R	0.00	0.00	0.00	0.00
Wp Shrink R%	0.00	0.00	0.00	0.00
Wp Receipts R	-834066.91	1973039.64	2272816.34	4711111.11
Ly Receipts R	11980944.32	10978024.51	12389093.23	2611111.11
Wp Misc In R	0.00	0.00	0.00	0.00

In [Figure 3–44](#), the two views, Rec/Inv Value Plan and Rec/Inv Unit Plan, have been synchronized to show the same data: 21 Men's Footwear within the Brick & Mortar channel.

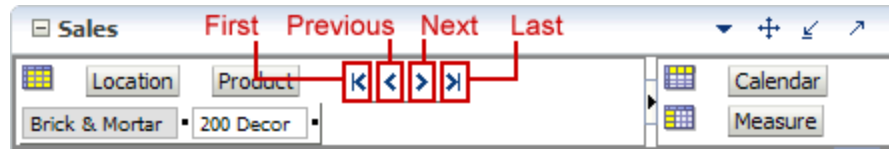
---

**Note:** The views in [Figure 3–44](#) have been tiled vertically. For more about the tiling options, see [View Menu Options](#).

---

Once you have enabled synchronized page edge scrolling, you can use the navigation arrows (Figure 3–45) to view other positions within that level. As you use the navigation arrows on one view to move to a different position, the other views that have the same level displayed move to the same position.

**Figure 3–45** Navigation Arrows



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**Note:** When views do not share the same lowest level of a dimension, the views do not scroll together.

---

If you save the workbook with the synchronized page edge option turned on, it is saved with the workbook. Therefore, when you open the workbook again, the synchronized option is still enabled.

---

---

## Working with Cells

The user's ability to edit multiple workbook cells at once and to move chunks of data in and out of the workbook is essential to using RPAS efficiently and effectively. This chapter describes how to select and edit cells as well as how to cut, copy, and paste information into cells.

### Select and Manipulate Cells in the Pivot Table

Cells or groups of cells must be selected in the pivot table before certain operations can be performed on them. Operations such as cutting and copying data, filling or clearing data cells, and displaying data in chart form are typically performed on a subset of cells that you must select before invoking the menu command.

There are several ways to select cells in the pivot table. Generally, you should make your selections in the view axes (where the column and row headers appear) and not in the cells themselves.

#### Select a Single Cell

Click inside the cell. When selected, the cell is shaded.

#### Select all Cells in a Row

Click the row header for that row of cells.

#### Select all Cells in a Column

Click the column header for that column of cells.

#### Select a Group of Contiguous Cells in the Same Row

1. Click the first cell in the row of cells you want to select.
2. Hold down the **Shift** key and click the last cell in the group. Once selected, the cells are shaded.

#### Select a Group of Contiguous Cells in the Same Column

1. Click the first cell in the column of cells you want to select.
2. Hold down the **Shift** key and click the last cell in the group. Once selected, the cells are shaded.

## Select a Block of Contiguous Cells

1. Click the top-most, left-most cell in the block you want to select.
2. Hold down the mouse and drag the cursor to the bottom-most, right-most cell in the block that you want to select.

## Select a Group of Non-Contiguous Cells

1. Click the first cell you want to select. The selected cell becomes shaded.
2. Hold down the **Ctrl** key and click the other cells you want to select. All selected cells become shaded.

**Figure 4–1 Non-Contiguous Cells**

Wp Sales contrib Time R%				
Wp Sales Demand Pre Ssn R	29,343,351.92	52,204,669.05	7,102,373.31	0.00
Wp Sales R	28,490,061.14	50,686,581.99	6,895,839.66	0.00
Wp Sales U	146,882	257,048	86,222	0
Wp Sales var Demand Pre Ssn R%	-2.9 %	-2.9 %	-2.9 %	-100.0 %
Wp Sales var Ly R%	1.7 %	1.7 %	1.7 %	-100.0 %

See the [Paste](#) section for information about copying and pasting non-contiguous cells.

## Enter or Change Values in a Cell

The following are descriptions of actions you can take to change individual values in the pivot table.

**Numbers:** Enter or overwrite a numeric value.

**Alphanumeric Values or Plain Text:** Enter or overwrite an alphanumeric value.

**Drop-Down List Items:** Select the desired option from the drop-down list. Click on the arrow button and select an item from the drop-down list.

**Date Items:** Select the desired date. Click the arrow button to display the calendar, and click the appropriate arrow keys to change the year, month, or date.

**Check Box (Toggle) Items:** Click the check box to change the status of the item (yes or no, on or off).

**Math Operations:** To increment the value in a cell using a mathematical formula, see [Modify Data with Cell Formulas](#).

## Modify Data with Cell Formulas

Cell formulas allow you to modify the value of a data cell in the pivot table by applying an operator (+, -, \*, or /) to that value. With this functionality, you can make changes to data values without having to manually calculate the result. To perform this function, click the data cell and type the operator that you want to add, subtract, multiply, or divide by.

For example, suppose that a particular data cell contains the value 10.

- **Add:** If you enter +10 in the cell, the value becomes 20.
- **Subtract:** If you enter + -10 in the cell, the value becomes 0.
- **Multiply:** If you enter \*10 in the cell, the value becomes 100.
- **Divide:** If you enter /10 in the cell, the value becomes 1.
- **Percentages:** If you want to increase the value of a cell by 10%, multiply the value by 1.1 (enter \*1.1)

There are many applications of cell formulas when modifying data. Cell formulas can only be applied to one cell at a time, but changes made to aggregate level cells will be spread down to lower-level cells along dimension lines. Similarly, any changes made to lower level cells will be reflected in the aggregates of that data.

## Using Math Formulas

Apart from the basic math operations, you can also extend the math operations and enter formulae in the cells. For example, entering **+30/2** in a cell with a value **70** will add **30** to the existing value, and then divide the result by **2**. Entering **10+30/2** in a cell will update the cell with a value **20**.

### Overriding Spread Methods

By default, making an edit in the aggregate level cell and calculating spreads the data based on the spread method of the measure.

However, you can override the default spread method of a measure and spread the aggregate data into individual cells using a different spread method. The override spread methods available are Replicate, Evenly, Proportionally, and Delta. Using this feature, you can spread data at an aggregate level down to the lower levels in a dimension.

For example, entering **40r** in a cell replicates **40** in the child dimension cells when the next calculate is performed. The calculation of the spread is done by the RPAS Server.

To override default spread method, add one of the following letters as a suffix to the cell value:

**(R)eplicate: [value] r** A value entered into a cell at an aggregate level is replicated (copied) into every cell at the aggregate cell's base level. This results in a higher aggregate cell total (the value entered multiplied by the number of base-level cells).

**(E)venly: [value] e** A value entered into a cell at an aggregate level is evenly distributed among all cells at the aggregate cell's base level.

**(P)roportionally: [value] p** A value entered into a cell at an aggregate level is distributed proportionally among all cells at the aggregate cell's base level (proportional to the original values in the base-level cells).

**(Delta: [value] d** The difference between a value entered into a cell at an aggregate level and the original value of that cell is distributed evenly among all cells at the aggregate cell's base level.

The spread action is performed, once you click **Calculate**. For more information on Calculating, see [Calculating Workbooks](#).

## Enter Measure Data Using a Scaling Factor

The scaling factor feature allows you to enter measure data that will be scaled or factored to an internal value, which is recognized by the server in data calculations. When you enter a value for a measure that has a scaling factor, the value that you enter will be multiplied by the scaling factor to arrive at this internal value. The display of the data and the ease of data entry can be greatly enhanced by use of a scaling factor.

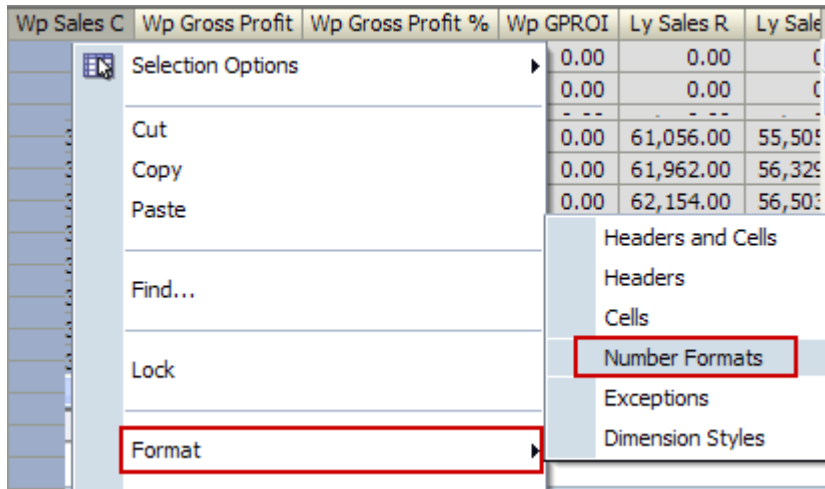
For example, suppose that you want to enter data in thousands of units. You might find it tedious to enter 1000, 2000, 6000, and so on. A more sensible approach would be to enter the values 1, 2, and 6, and have the system apply a scaling factor (in this case 1000) to the entered data. The internal values of the three affected cells would be 1000, 2000, and 6000, and these internal values would be used in required data calculations. Removing the zeros from the display would result in a cleaner, less cumbersome view appearance.

Scaling factors can be set in the RPAS Configuration Tools or through the formatting options in the RPAS Fusion Client. For more information setting scaling factors in the Configuration Tools, see the *RPAS Configuration Tools User Guide*.

To set scaling factors in the Fusion Client, perform the following steps:

1. Right-click a measure. The right-click context menu appears.

**Figure 4–2** Number Formats Option in the Right-Click Context Menu

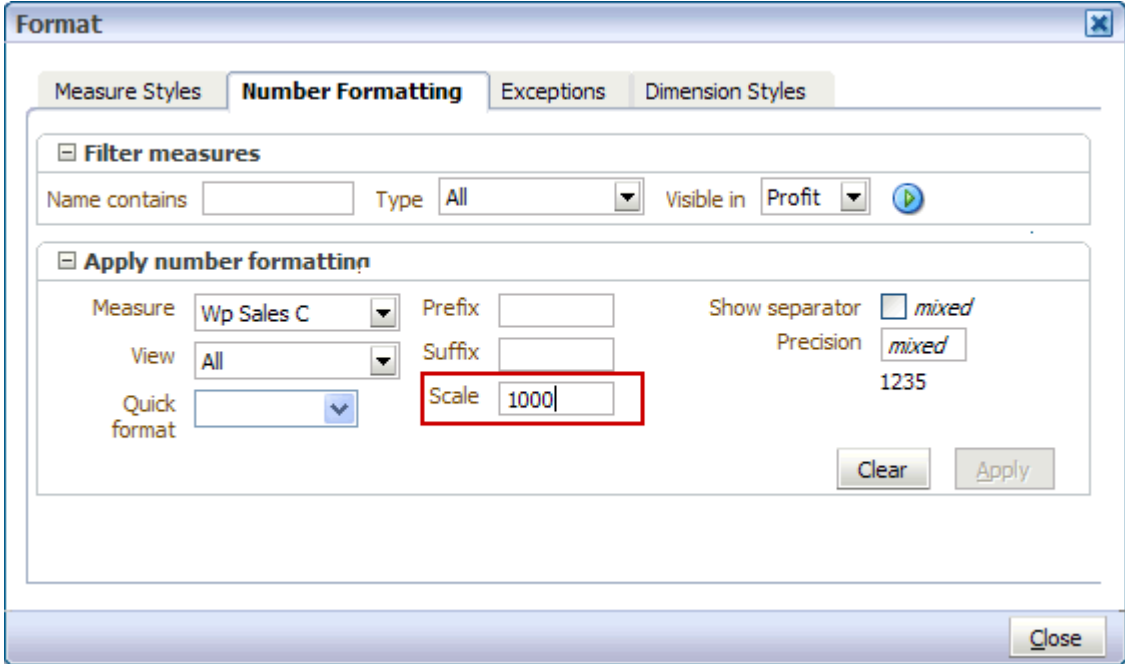


2. Select **Format**, and then select **Number Formats**. The Format dialog box appears.
3. Select the measure and views for which you want to change the scaling.



- 4. Enter a value in the Scale option, as shown in Figure 4-3.

Figure 4-3 Setting the Scale Option in the Number Formatting Tab

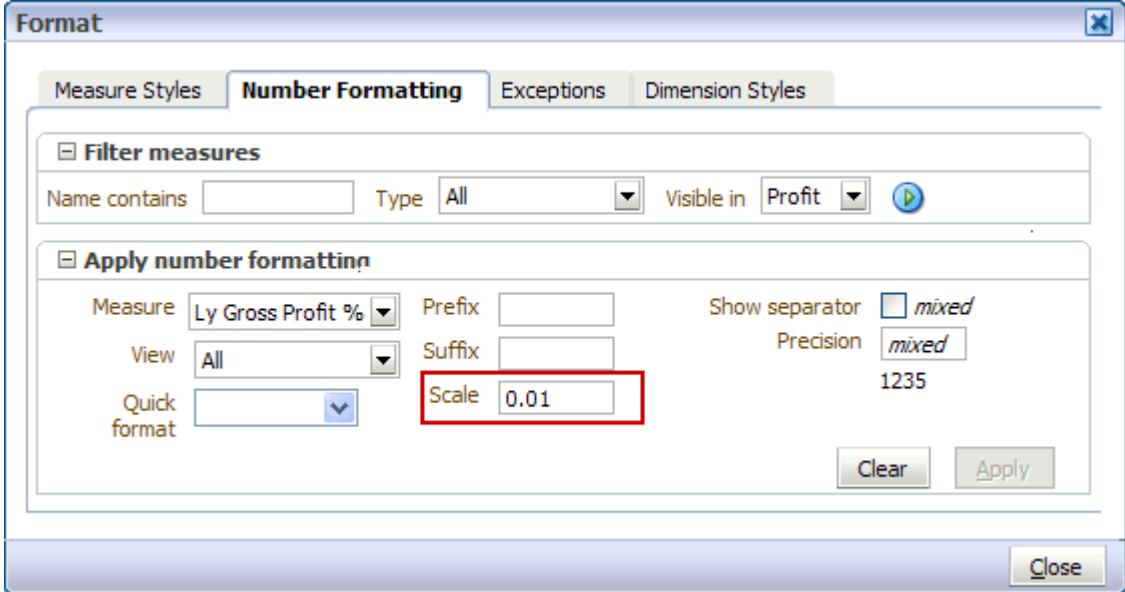


For instance, if you enter 1000 as the scale factor, then all values in the view are displayed in thousands, meaning that a value of 35 actually represents 35,000.

- 5. When finished, click **Apply** and then **Close**.

You can use the scale factor for percentages as well. Enter a scale of .01 if you want to see values displayed as percentages, meaning that you would see 19% rather than 0.19.

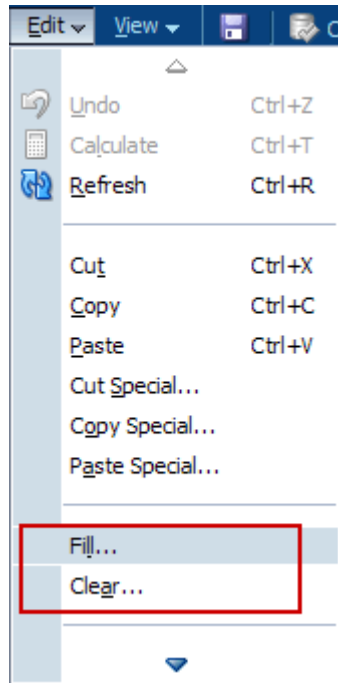
Figure 4-4 Using the Scale Option for Percentages



## Clear and Fill Cells in a View

Your ability to edit multiple workbook cells and to easily move data in and out of the workbooks is essential to using RPAS to its fullest extent. You can accomplish this by using the fill and clear functions. These are found in the Edit menu.

**Figure 4–5 Fill and Clear in the Edit Menu**



## Clear

The clear feature enables you to quickly clear the contents of cells in a view and set them to their NA value. With the clear function, you can clear one or more cells, a dimension level, or an entire slice.

### Clear Cells

1. Select the cells you want to clear. In [Figure 4–6](#), the weekly sales cells for three months have been selected.

**Figure 4–6 Cells Selected to be Cleared**

Sales Week		
Product		Location
10000044Kangaroo Pocket Sweater -		Barcelona
Find...		
Quarter 1, FY 2006		Weekly Sales - Regular
	February, FY 2006	4000000.00
	January, FY 2006	4000000.00
	March, FY 2006	5000000.00
Quarter 2, FY 2006		9000000.00

2. Select the **Clear** option in the Edit menu.
3. The selected cells are returned to their NA value, as shown in [Figure 4-7](#).

**Figure 4-7 Cleared Cells**

		Weekly Sales - Regular
[-] Quarter 1, FY 2006	[+] February, FY 2006	0.00
	[+] January, FY 2006	0.00
	[+] March, FY 2006	0.00
[+] Quarter 2, FY 2006		9000000.00

### Clear a Dimension Level

The steps for clearing a dimension level vary depending upon which view you are in, outline or block. In block view, you can click **Clear** in the Edit menu just as you do when clearing cells. However, clearing a dimension level in outline view works differently if more than one level is in the selection.

To clear a dimension level in outline view, perform the following steps:

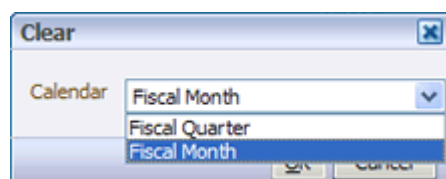
1. Select the cells you want to clear. In [Figure 4-8](#), the entire Weekly Sales - Regular measure has been selected, and two product dimension levels are selected: Fiscal Quarter and Fiscal Month.

**Figure 4-8 Clearing Dimension Levels**

		Weekly Sales - Regular	Boolean UI Type
[-] Quarter 1, FY 2006		13000000.00	<input type="checkbox"/>
[+] February, FY 2006		4000000.00	<input checked="" type="checkbox"/>
[+] January, FY 2006		4000000.00	<input type="checkbox"/>
[+] March, FY 2006		5000000.00	<input type="checkbox"/>
[-] Quarter 2, FY 2006		9000000.00	<input checked="" type="checkbox"/>
[+] April, FY 2006		0.00	<input checked="" type="checkbox"/>

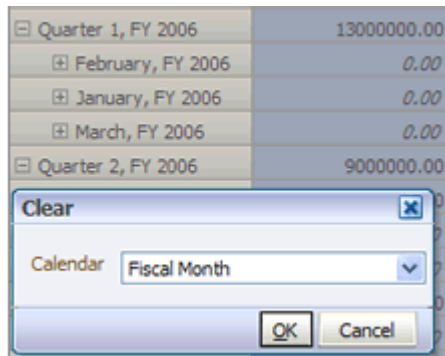
2. Select **Clear** in the Edit menu. The Clear dialog box appears.

**Figure 4-9 Clear Dialog Box**



3. Select the dimension level you want to clear and click **OK**. That dimension level clears in the background.

**Figure 4–10 Cleared Dimension Level**



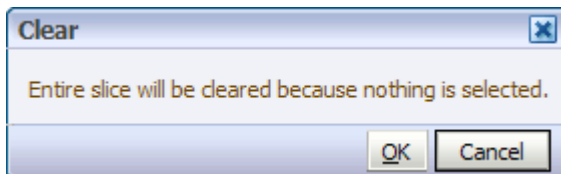
4. If you want to clear another dimension level, select it from the list and click **OK**. When finished clearing, close the Clear dialog box.

### Clear a Slice

You can clear an entire slice, all data shown in the view.

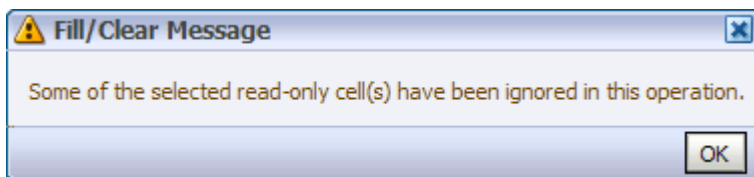
1. When you open the view, do not select any cell.  
If cells are selected, you can deselect them by clicking a dimension tile, opening the Dimension dialog box, and then clicking **OK** to close it.
2. With no cells selected in the view, click **Clear** in the Edit menu.
3. A message appears, stating "Entire slice will be cleared because nothing is selected." Click **OK**.

**Figure 4–11 Clear Entire Slice Message**



The entire slice is cleared. If any read-only cells exist in the slice, a message appears informing you that the read-only cells were not cleared.

**Figure 4–12 Fill/Clear Message: Ignored Read-only Cells**



If all selected cells are read-only, an error message appears, stating that none of the selected cells were editable and therefore the clear was not performed.

## Undo Clear

To undo any type of clear, click **Undo** in either the Edit menu or the quick access toolbar. However, once the **Calculate** function is invoked, the Undo option cannot reverse the clear.

## Fill

The fill feature enables you to quickly populate many cells of a writable measure at a time. Depending on which view you are using, outline or block, one of the following dialog boxes appears.

**Figure 4–13** *Fill Dialog Box in the Block View*

The screenshot shows the 'Fill' dialog box in Block View. The 'Measure' is set to 'Weekly Sales - Regular' and the 'Fill Value' is '1250.00'. Under 'Spread Method', 'Proportional' is selected. The 'Do not spread to NA value' checkbox is checked. The dialog has 'OK' and 'Cancel' buttons at the bottom.

**Figure 4–14** *Fill Dialog Box in the Outline View*

The screenshot shows the 'Fill' dialog box in Outline View. In addition to the measure and fill value fields, it includes 'Product' (Grandparent) and 'Calendar' (Week) dropdown menus. The 'Spread Method' options are the same as in Figure 4-13, with 'Proportional' selected and 'Do not spread to NA value' checked. 'OK' and 'Cancel' buttons are at the bottom.

As shown in [Figure 4–14](#), the outline view has additional dimension level fields. These are available whenever multiple dimensions are displayed in the outline view. You must choose which dimension level you want to fill with data.

To use the fill feature, perform the following steps.

1. Select what you want to fill. In Figure 4–15, the Weekly Sales - Regular measure for 10000123 Chunky Shrunken Sweater is selected. It its lower level has sixteen positions within it.

**Figure 4–15 Selecting a Cell to Fill**

	al UI Type	Singl...	Sto...	String ...	Weekly Sales - Regular
10000123Chunky Shrunken Sweater	16.00			Test	0.00
10000124Chunky Shrunken Sweater - Blac	1.00			Test	0.00
10000125Chunky Shrunken Sweater - Blac	1.00			Test	0.00
10000126Chunky Shrunken Sweater - Blac	1.00			Test	0.00
10000127Chunky Shrunken Sweater - Blac	1.00			Test	0.00

2. With a cell selected, click **Fill** in the Edit menu. The Fill dialog box appears.

**Note:** If no cells were selected before the fill feature was invoked, all cells within the measure that is selected in the Fill dialog box are filled. The fill applies to the current slice only.

If only a few cells were selected in the grid, only those selected cells are filled.

**Figure 4–16 Fill Dialog Box**

**Fill**

\* Measure: Weekly Sales - Regular

\* Fill Value: 1250

Product: Grandparent

Spread Method:

- Replicate
- Even
- Proportional
- Delta
- Do not spread to NA value

OK Cancel

3. Choose the measure you want to fill in the **Measure** field. If only one measure was selected, as in the example above, only one option appears.
4. Enter a value in the **Fill Value** field. The measure you selected determines the type of data you can input as the fill value. For instance, if you chose a Boolean type measure, only true or false are available options for the fill value.

5. In the next field, select the level of the dimension that you want the fill to apply to. The name of this field varies according to the dimension you selected.
6. Select the spread method to use to distribute that fill value among the lower levels that belong to the dimension level you selected. For the spread method, choose among the following:
  - **Replicate:** Any value filled into an aggregate level cell is replicated exactly to every base level cell that comprises the aggregate total.
  - **Even:** Any value filled into an aggregate level cell is spread evenly among that cell's lower level constituents.
  - **Proportional:** Any value filled into an aggregate level cell is spread proportionally among all lower level constituent cells. This is based on the content of the cells before the fill.
  - **Delta:** The difference between the value pasted in the aggregated cell level and the original value of the aggregate cell level is spread evenly among all lower-level constituent cells.

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---

**Note:** The Spread Method options are disabled when the base or lowest level of a dimension is selected. It is disabled because it is not possible to spread a fill value to lower levels if the lowest level is already selected.

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---

7. Decide whether you want the fill value to be spread to cells that currently have an NA value. If you select **Do not spread to NA Value**, the fill value data is not spread to lower level cells that contain an NA value before the fill. The NA values are left intact, and the aggregate data is spread to the remaining lower level cells.

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---

**Note:** The **Do not spread to NA value** options is only enabled if the spread method option is enabled.

---

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8. Click **OK** when finished. The Fill dialog box disappears.

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---

**Note:** If some of the selected cells were editable and some read-only, a message appears stating that the read-only cells were ignored.

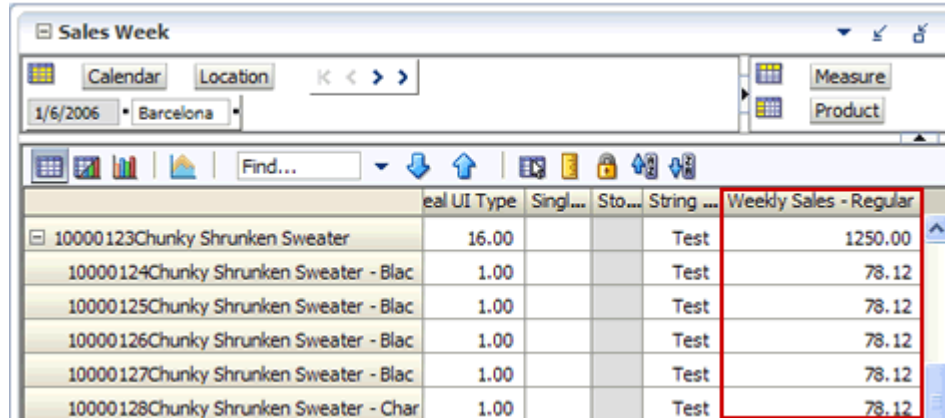
---

---

In the view, the new fill value appears in the cell. It is shown in italics because it has not been calculated or saved yet.

9. Click **Calculate**. The view refreshes and the fill value is now distributed throughout the lower levels. In [Figure 4-17](#), the fill value is distributed evenly among the lower levels.

**Figure 4-17** *Fill Value Distributed Among Lower Levels*



	Real UI Type	Singl...	Sto...	String ...	Weekly Sales - Regular
10000123Chunky Shrunken Sweater	16.00			Test	1250.00
10000124Chunky Shrunken Sweater - Blac	1.00			Test	78.12
10000125Chunky Shrunken Sweater - Blac	1.00			Test	78.12
10000126Chunky Shrunken Sweater - Blac	1.00			Test	78.12
10000127Chunky Shrunken Sweater - Blac	1.00			Test	78.12
10000128Chunky Shrunken Sweater - Char	1.00			Test	78.12

### Undo Fill

To undo a fill, click **Undo** in either the Edit menu or the quick access toolbar. However, once the **Calculate** function is invoked, the Undo option cannot revert the fill.



## Cut, Copy, and Paste

The cut, copy, and paste features provide flexibility to edit the workbook according to the business needs and transfer data from other applications (such as Excel) to the system as well as from RPAS to those other applications.

To apply cut/copy/paste operation, you first need to select data from the view. After selecting the appropriate cells, you can cut, copy, and paste. For more information, see the following sections.

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**Note:** The maximum number of cells that can be copied, cut, or pasted is limited by memory. These operations should not be used to export entire workbooks. For more information, see [Export](#).

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### Cut

Use this procedure to copy and remove data from the cells of a view in order to move the data to another view or other applications. Note that data created from deferred calculations can be cut.

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**Note:** You cannot cut data from non-editable or read-only measures.

---

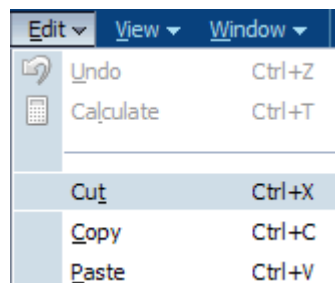


---

To cut data, perform the following steps:

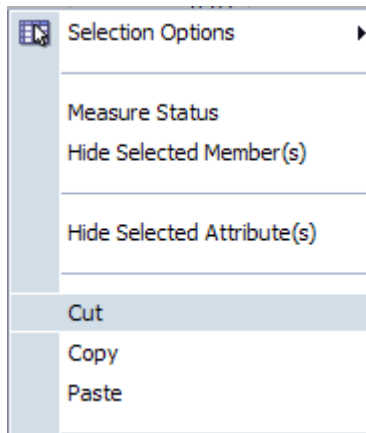
1. Select all data cells in the pivot table that you want to cut.
2. To cut the data and copy it to the clipboard, use one of these three methods:
  - From the **Edit** menu, click **Cut**.

**Figure 4–18** *Edit Menu – Cut*



- Right-click and select **Cut** from the right-click menu.

**Figure 4–19 Right-click Menu – Cut**



- Use the shortcut command **Ctrl + X**.
3. Data from the selected cells is copied to the clipboard. The selected cells now contain NA values.
  4. To paste the data to other cells or to another application, see the [Paste](#) section.

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---

**Note:** To remove the last deferred entries after using the cut option, right-click and select **Revert Cell** from the right-click menu. Or, use the shortcut option **Ctrl + Z**. You can also select the **Undo** option.

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## Copy

Use this procedure to copy selected data to the application clipboard. Unlike the cut function, the copy function does not clear the data from the view cells. It keeps data in a clipboard which you can use to transfer data within RPAS as well as to an outside application such as Excel. It also helps you to transfer large amount of data easily. Copied cells have just the unformatted textual content transferred over.

When copying from a cell to the clipboard, the string representation of the cells are copied to the clipboard so that it can be pasted into either other cells in the pivot table or to outside applications. Data containing deferred calculations can also be copied. There is no need to invoke **Calculate** before copying.

The following table shows what would be actually copied to the clipboard based on cell (measure) type.

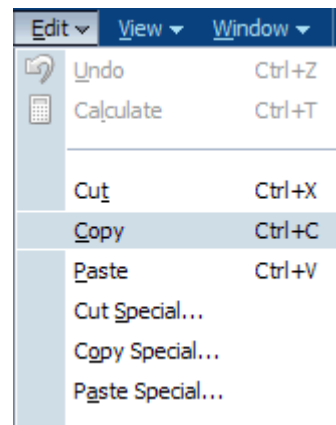
**Table 4–1 Copied Data**

Cell (Measure) Type	Behavior
Boolean	True, or checked, values are copied as 1. False, or unchecked, values are copied as 0.
Date	The formatted date is copied and visible in the cell.
Integer	The formatted number as displayed in the cell is copied. Prefixes and suffixes, such as \$ or %, are copied as well separators.
Picklist	The value displayed in the cell is copied.
Real	The number as displayed in the cell is copied. The format, such as \$ and %, is copied as well.
Single dimension	The value as displayed in the cell is copied.
String	The value as displayed in the cell is copied.

To copy data, perform the following steps:

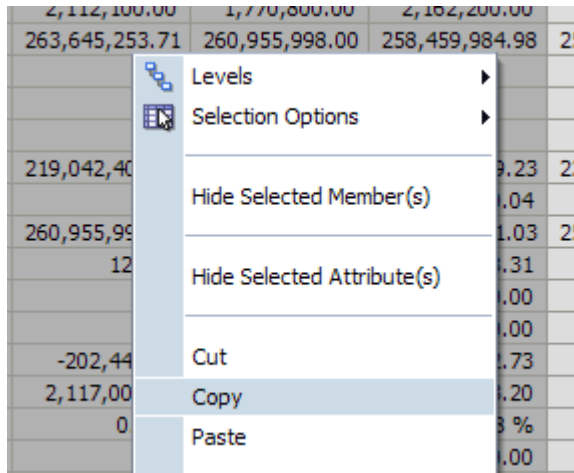
1. Select all data cells in the pivot table that you want to copy.
2. To copy the data to the clipboard, use one of these three methods:
  - From the **Edit** menu, click **Copy**.

**Figure 4–20 Edit Menu – Copy**



- Right-click and select **Copy** from the right-click menu.

**Figure 4–21 Right-click Menu – Copy**



- Use the shortcut command **Ctrl + C**.

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---

**Note:** If no cells are selected, the **Edit** menu and right-click options are grayed out. If no cells are selected when the **Ctrl +C** method is used, a warning message appears that states, "No positions have been selected for this operation."

---

---

3. The selected cells are copied to the clipboard.

## Paste

Once you have copied or cut data from a view, you can paste it to other cells within the RPAS Fusion Client or you can paste it to an application such as Excel. The Paste option pastes the data that was last placed on the clipboard into the selected cells.

---

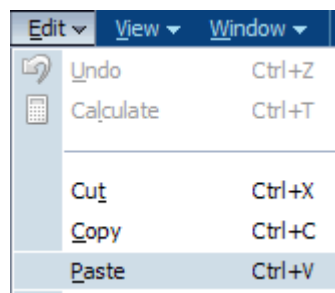
**Note:** Although non-contiguous data cells can be copied, they cannot be pasted as non-contiguous cells. Data copied from non-contiguous cells does not maintain the pattern in which it was copied. For information about selecting non-contiguous cells, see [Select a Group of Non-Contiguous Cells](#).

---

To paste data, perform the following steps after you have copied or cut data from another location:

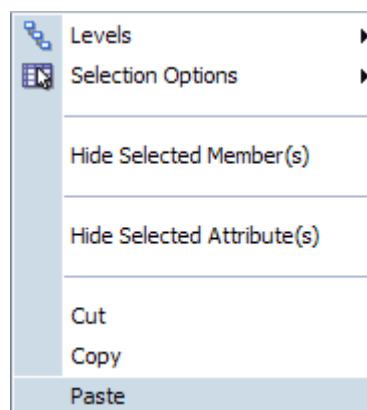
1. Select the cells in which you want to paste the data.
2. To paste the data into the cells, use one of these three methods:
  - From the **Edit** menu, click **Paste**.

**Figure 4-22 Edit Menu – Paste**



- Right-click and select **Paste** from the right-click menu.

**Figure 4-23 Right-click Menu – Paste**



- Use the shortcut command **Ctrl + V**.

---

**Note:** If protection processing does not allow data to be pasted into the selected cell, the paste operation is aborted.

---

## Cut, Copy, and Paste Special

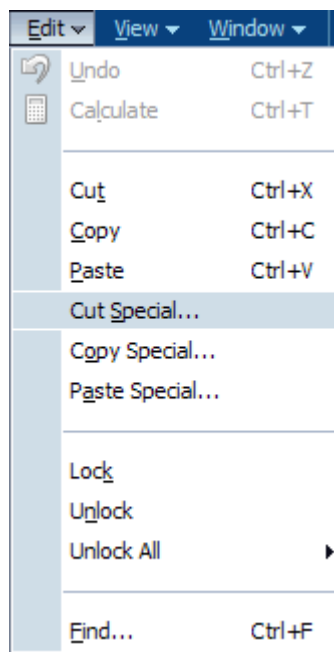
### Cut Special

You can also cut data at the base level or higher level intersection across page slices. If multiple levels (product group, style, etc.) are represented in the pivot table selections, the cut option is performed at the lowest level actually selected. Once data is cut from the selected cells, you can paste data to other selected cells in the pivot table.

To cut data, perform the following steps:

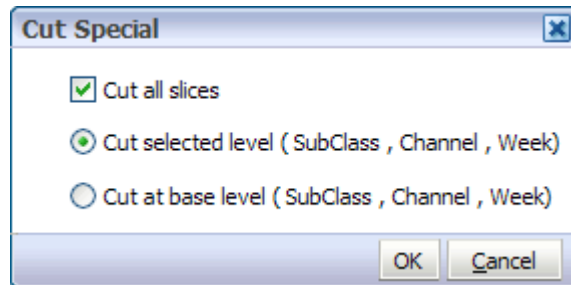
1. Select all data cells in the pivot table that you want to cut.
2. From the **Edit** menu, click **Cut Special**.

**Figure 4–24** Edit Menu – Cut Special



3. The Cut Special menu appears.

**Figure 4–25** *Cut Special Menu*



Select from the following options:

- **Cut all Slices:** This option is enabled only if the current workbook view contains more than one page slice. Otherwise, this options is disabled. When this option is selected, the cut operation behaves as if all positions in the slice dimension's levels were selected prior to the cut. If the box is left unchecked, only the data from the current slice position is cleared and copied.
- **Cut selected level:** This option cuts only the selected level of data.
- **Cut at base level:** This option allows you to cut the data at the measure's lowest intersection. Although the cut function is performed at the base level, it seems that the aggregated level data has been cut since the data is rolled up.

## Copy Special

You can also copy data at the base level or higher level intersection across page slices. Once data is copied from the selected cells, you can paste data to other selected cells in the pivot table. This feature allows you to view data at an aggregate level while copying data at a dimensional level not currently displayed or while selecting data from the current slice while copying data from all slices. You can copy data at the base level only or copy from all slices without selecting the base level data or without selecting data from entire slices.

---

---

**Note:** Data copied using the Copy Special option is not copied to the clipboard. It is copied to the RPAS server.

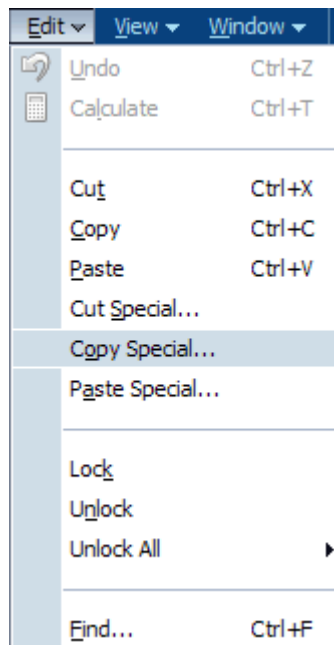
---

---

To copy data, perform the following steps:

1. Select all data cells in the pivot table that you want to copy.
2. From the Edit menu, click **Copy Special**.

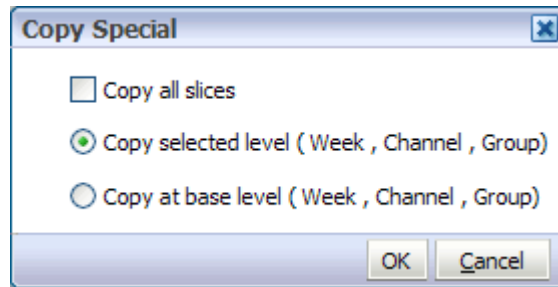
**Figure 4–26** Edit Menu – Copy Special





3. The Copy Special menu appears.

**Figure 4–27 Copy Special Menu**



Select from the following options:

- **Copy all slices:** This option is enabled only if the current workbook view contains more than one page slice. Otherwise, this options is disabled. When this option is selected, the copy operation behaves as if all positions in the slice dimension's levels were selected prior to the copy. If the box is left unchecked, only the data from the current slice position is copied.
  - **Copy selected level:** This option allows you to copy the level of data shown in the pivot table. The base level data from which the displayed data is created is not copied.
  - **Copy at base level:** This option allows you to copy the base level data, which is the measure's lowest intersection, which may not be displayed in the pivot table. If this option is not selected, the data is copied for the selected dimension level only.
4. The selected data is copied to the RPAS server. It is not copied to the clipboard. You can paste the copied data to other selected cells in the workbook multiple times. The copied data is available to the RPAS server until the workbook is closed.

## Paste Special

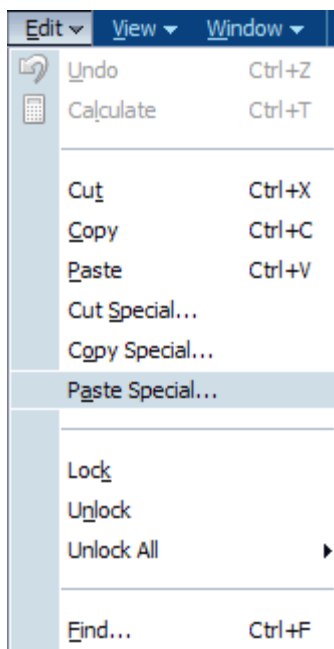
Paste Special allows you to view data at an aggregate level while pasting it at the base level which is not displayed in the current slices. It provides a dialog where user can specify options for specialized paste functions.

If the levels of multiple dimensions are represented in the pivot table selections, the default paste option is performed at the lowest level.

To use special paste, perform the following steps:

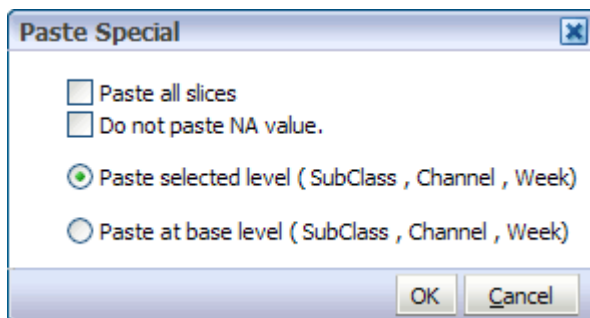
1. Before using paste, you have placed data in clipboard using **Cut**, **Cut Special**, **Copy**, or **Copy Special** from the Edit menu.
2. Select **Paste Special** from the Edit menu.

**Figure 4–28 Edit Menu – Paste Special**



3. The Paste Special menu appears.

**Figure 4–29 Paste Special Menu**



Select from the following options:

- **Paste all slices:** this option pastes data to all slices. If not selected, data is only pasted to the currently displayed slice position.

- **Do not paste NA values:** If this option is selected, cut or copied NA data values are not pasted into the current selection. Whenever the system encounters an NA value in the copied data, that value is ignored and the data cell being pasted keeps its original value. In other words, when this option is selected, the current pivot table data is not overwritten by NA values.
  - **Paste selected level:** This option only pastes data at the level of data shown in the pivot table.
  - **Paste at base level:** This option is enabled only if none of the base level measures are selected before the paste. This option enables you to paste data at the base level, which may not be currently displayed in the workbook. This allows you to view data at an aggregate level while pasting it at the base level.
4. Click OK. The selected data is pasted.

## Read-only Measures

Read-only measures are defined during the domain configuration process. The read-only status can be set at both the base intersection and aggregate levels. Read-only measures are indicated as non-editable cells based on measure information retrieved when the workbook is opened.

Read-only cells by default have a gray cell background color. This same default color used to indicate protection processing protected cells and elapsed cells. If the visual indicator for read only is changed to be different than the visual indicator for protected cells and the cell is both read-only and protected, then the cell will display the visual indicator for protected cells. These cells are not editable from the RPAS Fusion Client.

**Figure 4–30 Read-only and Writable Measures**

	30039 Printers	30040 Plasma Flat Panel	30041 LCD Flat Panel	30042 Projection	30043 Printers
Ly Sales AUR	0.00	0.00	0.00	0.00	0.00
Ly Sales R	0.00	0.00	0.00	0.00	0.00
Ly Sales U	0	0	0	0	0
Wp COGS C	0.00	0.00	0.00	0.00	0.00
Wp Gross Margin	0.00	0.00	0.00	0.00	0.00
Wp Gross Margin %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Wp Sales AUR	0.00	0.00	0.00	0.00	0.00
Wp Sales contrib Prod R%					
Wp Sales contrib Time R%					
Wp Sales Demand Pre Ssn R	0.00	0.00	0.00	0.00	0.00
Wp Sales R	0.00	0.00	0.00	0.00	0.00
Wp Sales U	0	0	0	0	0
Wp Sales var Demand Pre Ssn R%	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Wp Sales var Ly R%	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %

## Locking and Unlocking

In addition to read-only workbooks and measures, the RPAS Fusion Client also provides a locking function in order to protect information. The locking function can be performed on cells, measures, and positions (a level in a dimension).

**Cell locking** is available on any editable cell and invokes protection processing.

**Measure locking** is available on any measure and invokes protection processing.

**Position locking** is available on non-calendar dimensions and does not invoke protection processing.

### Cells

The cell locking feature allows you to lock one or more editable cells in the pivot table. When a table cell is locked, calculations performed as a result of data manipulations do not affect the locked data values. This functionality allows you examine various what-if scenarios to determine the best course of action for planning or forecasting.

The RPAS Fusion Client iterates through the selected cells by measure, then by column, then by row. Locked cell information is immediately transferred to the RPAS Server. The locked cell information is saved with the workbook and locked cells continue to be locked upon reopening the workbook.

The locked status of a cell is indicated by the presence of a picture of a lock in the cell's left portion. Once an eligible cell is locked, the system determines whether the remaining table cells are eligible or ineligible to be locked. For instance, if all the children cells of any parent cell are locked, the parent cell cannot be locked. Instead, any edits to the parent cell are spread to the children cells based on the ratio of the values locked into the cells. If a cell becomes ineligible to be locked, the right-click menu associated with that cell does not contain the Lock option. Furthermore, any read/write cells that become ineligible for locking are made read-only.

You may choose to lock a data cell at any time to protect that cell from forced recalculations due to data manipulations elsewhere in the workbook. For example, you may want to see the effect of a change to sales value on inventory levels without forcing a change to receipts. Another example would be to change sales value at an aggregate level (such as month) and spread the result to only three of the four weeks that comprise that month. In this case, you could effectively hold the second week's sales value constant while spreading the aggregate-level increase among the remaining three weeks.

Protection processing executes against locked cells as if they were edited to their current value. Cell locks do not appear in the Undo list, which appears next to the **Undo** icon in the toolbar when more than one edit has been made. In addition, cell locks are not affected by the **Undo** option from the menus. Only cell value edit changes appear in the Undo list. Cell lock or unlock actions do not force a calculation cycle to execute.

### Measures

The measure locking feature enables you to simultaneously lock all of the cells that are associated with a given measure in a view. A measure can be locked or unlocked when the header cell of the measure dimension is selected. As with individual cell locking, the locked status of each cell in the measure is indicated by the lock picture in each cell's left portion.

Locked measure information is immediately transferred to the RPAS Server. The locked measure information is saved with the workbook, so locking measures enables the save features of the workbook. The locked measure information is saved with the workbook and locked measures continue to be locked upon reopening the workbook.

Protection processing executes against a locked measure as if the measure has been edited to the same value.

If multiple measures are selected, they are locked or unlocked in row or column order. A measure may be locked even if it is already protected by protection processing.

---

**Note:** You can only make a selection at one level in the headers of a multidimensional header. The lock and unlock applies to the selected measure only. Locked measures are designated by a pound sign (#) in the header text of the measure.

---

## Positions

Position locking allows you to lock all measures in all displayed views along one or more positions of non-calendar dimensions. Cells along unlocked positions are still editable and can also change as a result of calculations. Locked positions are designated by a pound sign (#) in front of the position name. The cells of the locked position are shaded as read-only.

**Figure 4-31 Locked Positions**

all [Product]	6,395,727.08	4,614,936.42	5,826,473.62
#1000 Consumer Goods	4,520,010.76	3,184,408.23	3,237,597.72
#100 Non-food Consumer Goods	2,727,244.55	1,869,248.34	1,748,455.92
#200 Decor	341,387.40	284,440.70	366,665.90
#300 Food	1,451,378.81	1,030,719.19	1,122,475.90
20 Menswear	726,927.25	584,137.59	1,015,016.03
21 Men's Footwear	75,313.20	45,816.20	83,031.40

Protection processing does not run against cells locked by a position lock. Unlike cell locks, a parent position becomes locked if all its children are locked. They become unlocked if any of their children are unlocked. Hidden children are considered when deciding if a parent position becomes locked. Unlocking or locking the parent unlocks or locks all the children. Hidden children positions are treated the same as visible children. Unlike a measure lock, the lock indicators do not show up in each of the cells, only in the header cells, even though the cells are displayed as read-only.

Locked position information is immediately transferred to the RPAS Server. The locked position information is saved with the workbook, so locking positions enable the save features of the workbook. The locked position information is saved with the workbook and locked positions continue to be locked upon reopening the workbook.

A position cannot be locked when locking it affects an edited or locked cell. A warning modal dialog is displayed and asks you to revert the affected edits and calculate the workbook or cancel the position locks. You are warned if a cell lock is affected and given the choice of canceling the position lock or unlocking the affected cell locks and continuing. If both edits and cell locks are affected, the you see both dialogs with the edit dialog appearing first. If you cancel the position lock from either dialog, then no action is taken against either locked or edited cells.

## Locking and Unlocking Methods

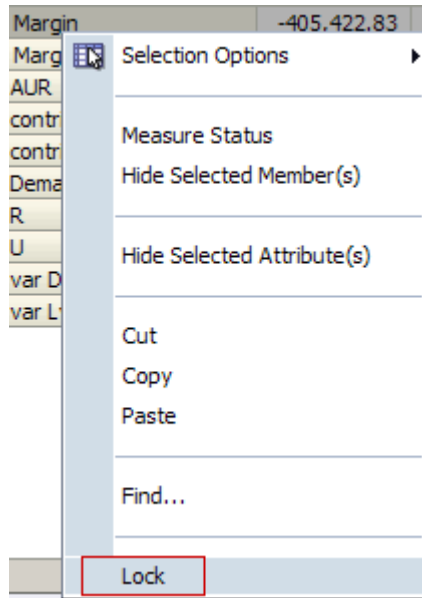
You can initiate locks by selecting a cell, measure, or position within the pivot table and then selecting one of three options to initiate a lock or unlock action. Locking and unlocking can be done through the following:

- [Locking through the Right-click Context Menu](#)
- [Locking through the Edit Menu](#)
- [Locking with the Lock Icon](#)

### Locking through the Right-click Context Menu

One way that you can lock or unlock a cell, measure, or position is through the right-click context menu. Depending upon what is selected, the context menu determines whether the **Lock** or **Unlock** option is shown.




**Figure 4–32 Locking: Right-click Context Menu**



To lock using the context menu, perform the following:

1. Select a cell, measure or position. Once selected, it is shaded.
2. Right-click the mouse. The context menu appears. If the cell, measure, or position is not already locked, the **Lock** option appears in the menu.
3. Select the **Lock** option.
4. The selected item or items show a lock symbol.

**Figure 4–33 Lock Symbol Shown in a Locked Measure**

	Feb FY2009		
	2/7/2009	2/14/2009	2/21/2009
#Ly COGS C	 2,727,244.55	 1,869,248.34	 1,748,455.92

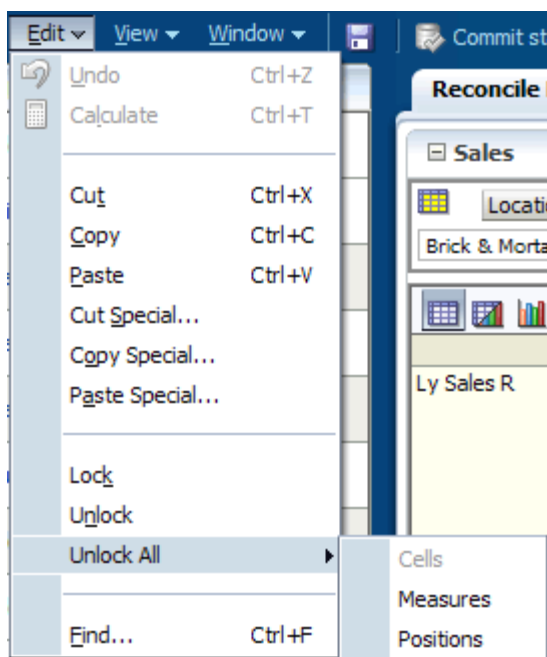
**Note:** Locked positions do not display a lock symbol in each cell. Locked positions only contain a pound sign (#) in the header.

### Locking through the Edit Menu

Another way you can lock a cell, measure, or position is through the Edit menu. The Edit menu contains several locking options:

- Lock
- Unlock
- Unlock All Cells
- Unlock All Measures
- Unlock All Positions

**Figure 4-34** Locking Options in the Edit Menu

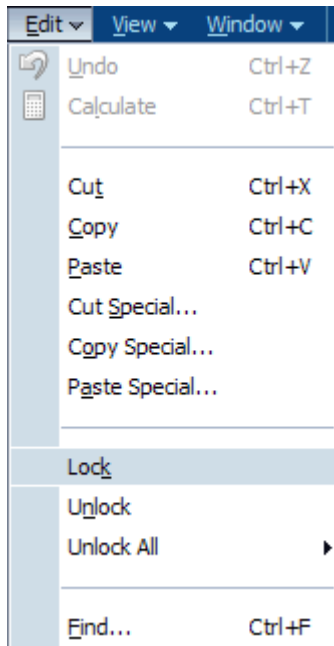


To lock using the Edit menu method, perform the following:

1. Select a cell, measure or position. Once selected, it is shaded.

- From the Edit menu, click the **Lock** option.

**Figure 4–35 Locking through the Edit Menu**



- The selected item or items show a lock symbol.

---



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**Note:** Locked positions do not display a lock symbol in each cell. Locked positions only contain a pound sign (#) in the header.

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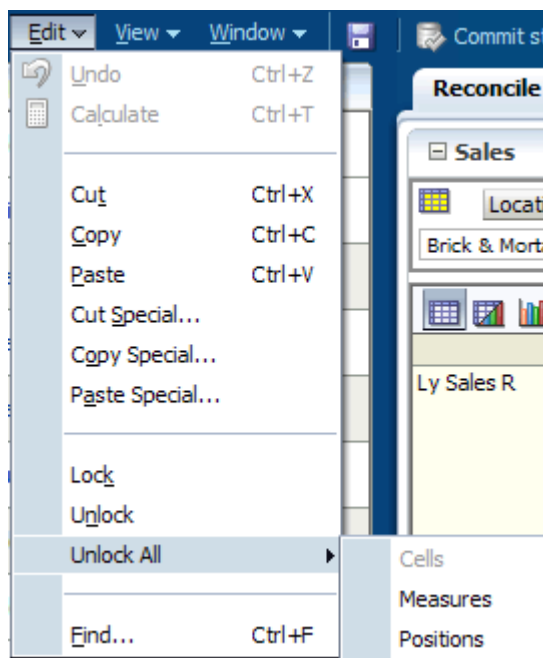
To unlock using the Edit menu method, perform the following:

1. Select the cell, measure or position that is locked.
2. From the Edit menu, click **Unlock**.

OR

If you want to unlock all cells, measures, or positions, select **Unlock All** and choose the type you want to unlock.

**Figure 4–36 Locking Options in the Edit menu**



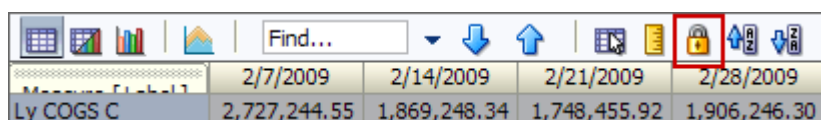
### Locking with the Lock Icon

The third way you can lock a cell, measure, or position is with the Lock icon in the toolbar. If some selected cells are already locked, they are ignored. If all selected cells are already locked, then the selected cells are unlocked instead of locked. If there is an error when locking any of the selected cells, measures or positions then an error message will be displayed and all of the applied locks will be reset. Cells that were already locked when the lock action started will remain locked.

To lock using this method, perform the following:

1. Select a cell, measure or position. Once selected, it is shaded.
2. Click the **Lock** icon in the toolbar.

**Figure 4–37 Locking with the Lock Icon**



3. The selected item or items show a lock symbol.

---

---

**Note:** Locked positions do not display a lock symbol in each cell.  
Locked positions only contain a pound sign (#) in the header.

---

---

## Formatting

RPAS enables you to configure formatting settings of workbooks and save those settings for future use. You can configure some formatting within the Fusion Client as well as through the RPAS Configuration Tools. For more information configuring formatting with the Configuration Tools, see the *RPAS Configuration Tools User Guide*.

Formatting settings are created in the Format dialog box. In the Format dialog box, you can set and clear formats that apply to measures or dimensions. You can make changes to single or multiple measures and dimensions and apply those changes across one, many, or all views in the workbook.

### Default Cell Formats

Some formatting cannot be altered in the Fusion Client. Read-only and protected cells as well as edited cells have default formats that are configured in a property file for the entire solution. The default formats are shown in [Table 5-1](#).

**Table 5-1** Default Formats

Cell State	Configurable Style	Default Style
Read-only cells	Cell Style	Light grey background color.
Protected cells	Cell Style	Light grey background color.
Invalid cells	Cell Style	Dark grey background color.
Editable Cells	Cell Style	None (white background color).
Edited Cells	Text Style	Italic font, white background color.

Read-only cells are those which cannot be edited for any reason. In [Figure 5-1](#), the cells of the Ly Sales R measure are read-only since the data is from last year and cannot be changed because it occurred in the past.

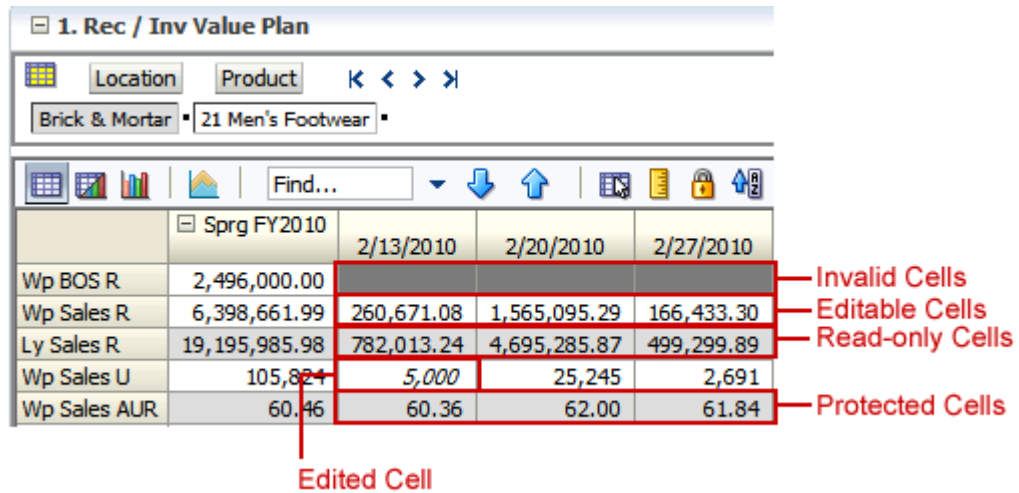
Protected cells are those which are read-only to ensure there are no more edits which may cause conflicts. In [Figure 5-1](#), the cells of the Wp Sales AUR measure are protected because that measure is based on the data from Wp Sales U, which has been edited. For more information, see [Protection Processing](#).

Invalid cells are those which are at a level in the view below the base intersection of the measure. In [Figure 5-1](#), the Wp BOS R measure has a base time level of Half, and so it is invalid at the week level. Therefore, the cell in the Sprg Fy2010 is editable, but the cells in the week columns are invalid.

Editable cells can be edited. In [Figure 5-1](#), the cells of the Wp Sales R and Wp Sales U measures are editable and therefore have white cell backgrounds.

Once a cell has been edited, it retains its white cell background, but its font becomes italic. In Figure 5-1, the 2/13/2010 cell in the Wp Sales U measure has been edited.

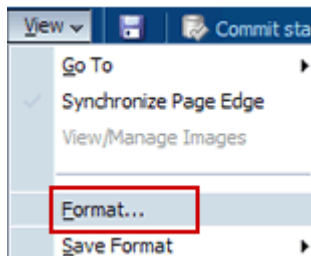
**Figure 5-1 Default Cell Formats**



## Modify Formatting

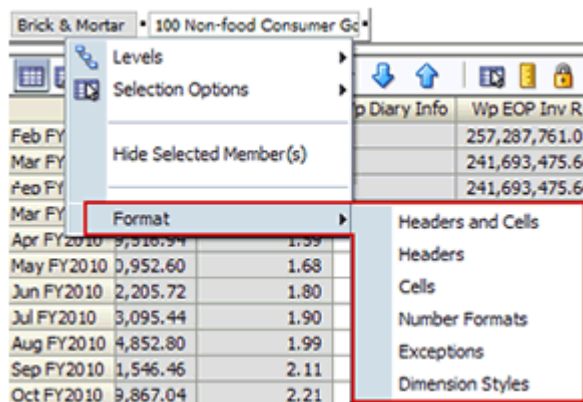
To access the Format dialog box, select **Format** from the View menu.

**Figure 5-2 Format Option in the View Menu**



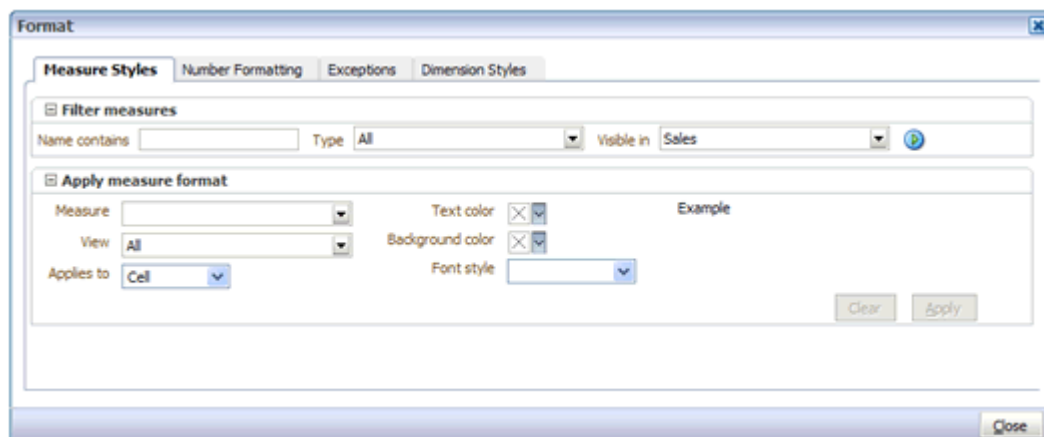
Or, right-click on a dimension position in the page edge, column axis, or row axis.

**Figure 5-3 Format Option in the Right-Click Context Menu**



The Format dialog box appears. From the Format dialog box, you can modify measure styles, number formatting, exceptions, and dimension styles.

**Figure 5–4** *Format Dialog Box*



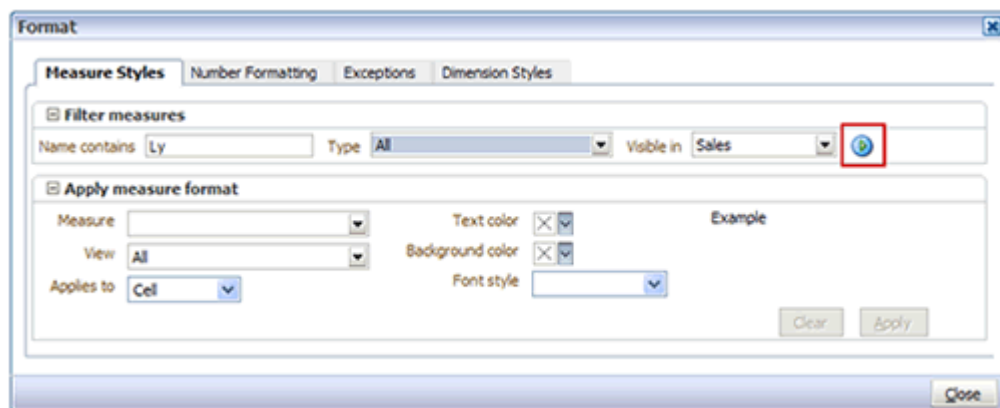
## Using the Filter to Find Measures

You can use the filter to find measures that share name commonality, type, or location. To use the filter, perform the following steps:

1. Enter data in at least one of the following fields:
  - **Name contains:** Enter the word or phrase you want to find. The word or phrase is searched for in the entire label string, including any displayed attributes. This field is not case sensitive.
  - **Type:** Select the type of measure you are searching for. Options are integer, real, date, text, Boolean, or all types.
  - **Visible in:** Select the view that you want to search in. You can select one, several, or all.

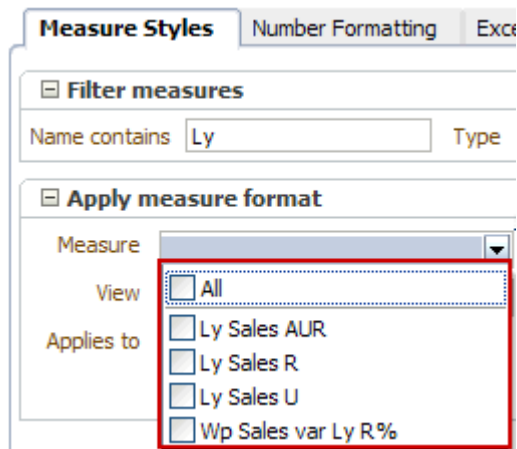
In [Figure 5–5](#), the string "Ly" is searched for in all types of measures within the Sales view.

**Figure 5–5** *Filtering Measures*



- Once you have entered the search criteria, click the blue arrow button on the right side of the Filter measures area. The measures that fit your search criteria are shown in the **Measure** field within the Apply measure format area.

**Figure 5–6 Filter Results**



### Percent of Parent Measures

Percent of parent measures also appear in the Measure field. Some percent of parent measures have the same label as the measure from which it was created. Therefore, when displaying measure labels in the Measure field, a series of attributes may be used to describe the measure. The attributes are separated by a delimiter character.

The order of attributes is usually displayed as **[Label] | [%] | [Aggregation]**

For example:

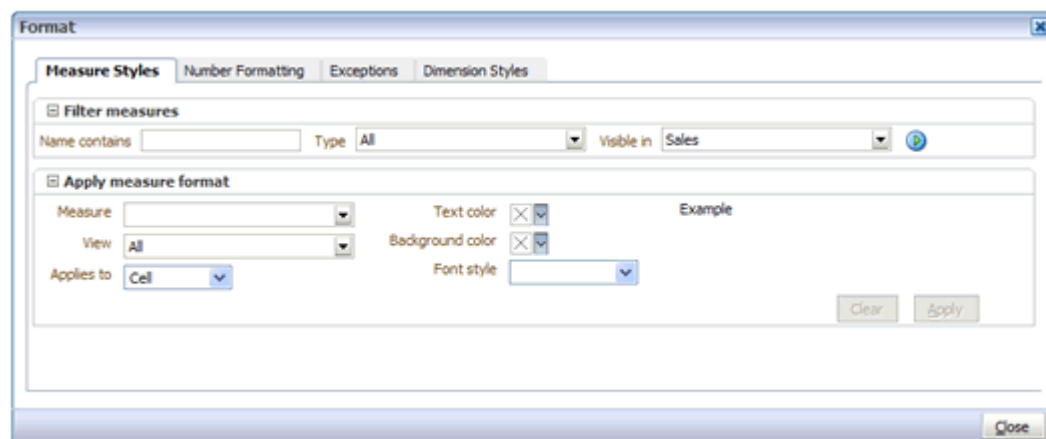
- Wp Gross Margin | | TOTAL
- Wp Sales contrb Prod R% | % Product | TOTAL
- Wp Sales contrb Time R% | % Calendar | TOTAL

## Modifying Measure Styles

From the Measure Styles tab of the Format dialog box, you can locate measures with the filter feature and then modify the measure style for those measures. Measures can be modified by altering the appearance of the headers cells.

When the filter feature is not in use, the measures that appear in the **Measure** field within the Apply measure format section shows the measures that are contained in the current view.

**Figure 5–7** Measure Styles Tab of the Format Dialog Box

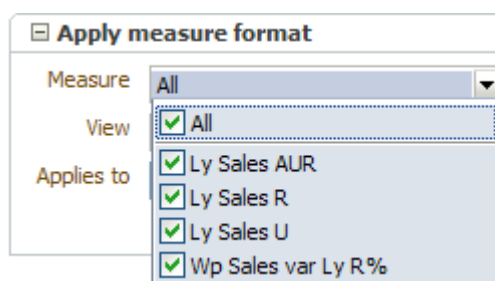


### Applying Measure Formats

Once you have found the measures you would like to change, you can edit or clear the existing formats for those measures and add new ones. To alter the measure format, perform the following steps:

1. Use the filter to find the measures you want to alter. See [Using the Filter to Find Measures](#).
2. Select the measures you want to alter from the Measure field. You can select one, several, or all.

**Figure 5–8** Select Measures



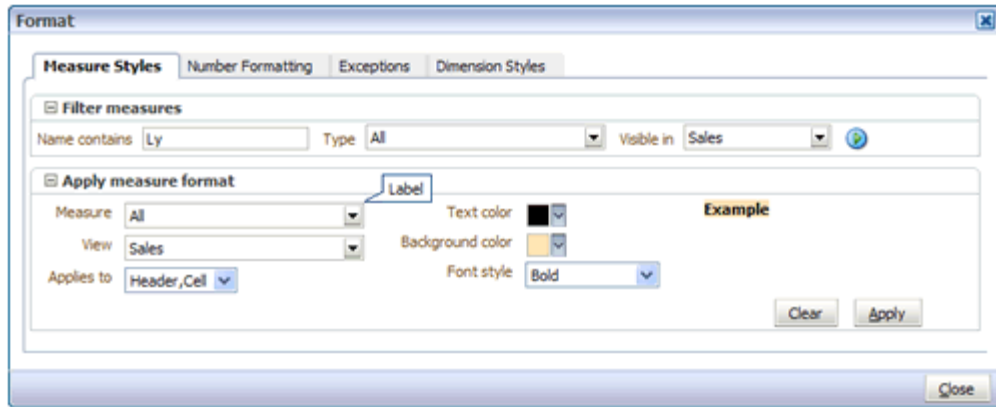
3. In the **View** field, select the views where these measures appear that you would like to alter.
4. In the **Applies to** field, select the part of the measure formatting that you would like to alter.

- In the **Text color**, **Background color**, and **Font style** fields, choose the settings you want to apply.

**Note:** The cell background for read-only measures cannot be altered.

- When finished, click **Apply** and **Close**.

**Figure 5–9 Applying Measure Formatting**



The Format dialog box closes. In the view the new formatting is visible.

**Figure 5–10 Formatted Measures**

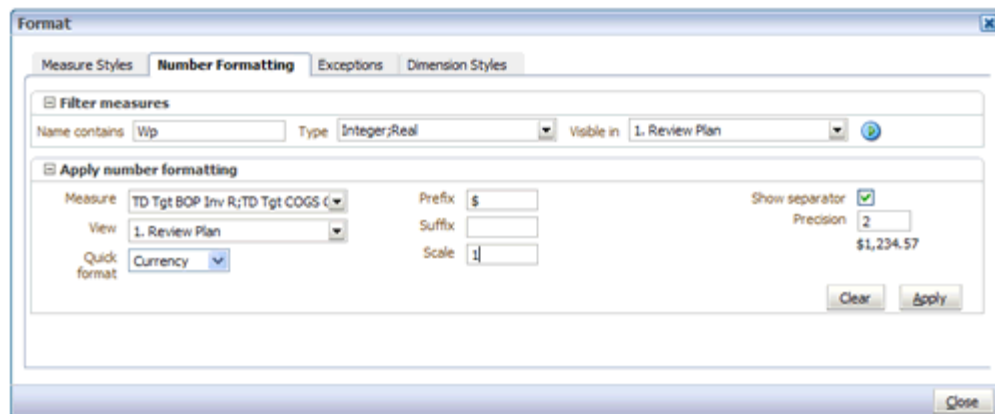
	Ly Sales AUR	Ly Sales R	Ly Sales U	Wp Markdown R
100 Non-food Consumer Goods	102.06	3,325,700.00	32,587	410,530.72
200 Decor	13.13	905,800.00	69,004	24,423.71
21 Men's Footwear	59.41	172,700.00	2,907	39,840.91
22 Men's Casualwear	19.52	1,837,700.00	94,152	369,080.81
300 Food	2.62	1,594,400.00	608,745	346,179.55
31 Women's Footwear	48.69	813,400.00	16,707	255,715.17
32 Women's Casualwear	24.88	2,077,600.00	83,521	349,408.16



## Modifying Number Formatting

From the Number Formatting tab of the Format dialog box, you can locate measures with the filter feature and then modify the number formatting for those measures. When the filter feature is not in use, the measures that appear in the **Measure** field within the Apply measure format section shows the measures that are contained in the current view.

**Figure 5–11** Number Formatting Tab of the Format Dialog Box

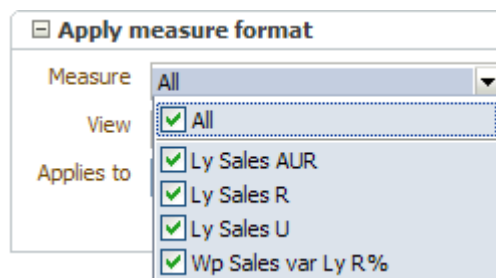


### Applying Number Formats

Once you have found the measures you would like to change, you can edit or clear the existing number formats for those measures and add new ones. To alter the number format, perform the following steps:

1. Use the filter to find the measures you want to alter. See [Using the Filter to Find Measures](#).
2. Select the measures you want to alter from the Measure field. You can select one, several, or all.

**Figure 5–12** Select Measures



3. In the **View** field, select the views where these measures appear that you would like to alter.

4. The **Quick format** field contains four preconfigured number formats: currency, percentage, thousands, and millions. If one of these formats suits your needs, select it. The values in the **Prefix**, **Suffix**, and **Scale** fields adjust accordingly. If the quick formats do not suit your needs, continue to the next steps to adjust the remaining fields.

**Table 5–2 Quick Format Options**

Quick Format	Description
Currency	The currency format as a scale factor of 1 and a prefix of \$. It has a precision of 2. For example, \$1223.45.
Percentage	The percentage format has a scale factor of 0.01 and a suffix of %. It has a precision of 0. For example, 16%.
Thousands	The thousands format has a scale factor of 1000 and a suffix of k. It has a precision of 0. For example, 1,235k.
Millions	The millions format has a scale factor of 1000000 and a suffix of M. It has a precision of 0. For example, 1,235M.

5. In the **Prefix** field, enter a string up to seven characters that you want to appear before number. Prefixes are often used for a currency symbol.
6. In the **Suffix** field, enter a string up to seven characters that you want to appear after the number. Suffixes are often used to denote scaling factors (k, m) or percentages (%).
7. In the **Scale** field, enter the factor to be applied to displayed values to produce an internal value. For instance, you can use this to display a fractional value as a percentage with a scale factor of 0.01
8. Select the **Show separator** option to use the thousands separator in the view. The thousands separator depends upon the regional setting. Often though, it is a comma.
9. In the **Precision** field, enter the number of places to the right of the decimal to be displayed. The precision value for integers is 0.

---



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**Note:** Below the Precision field is an example of how the formatted number appears.

---



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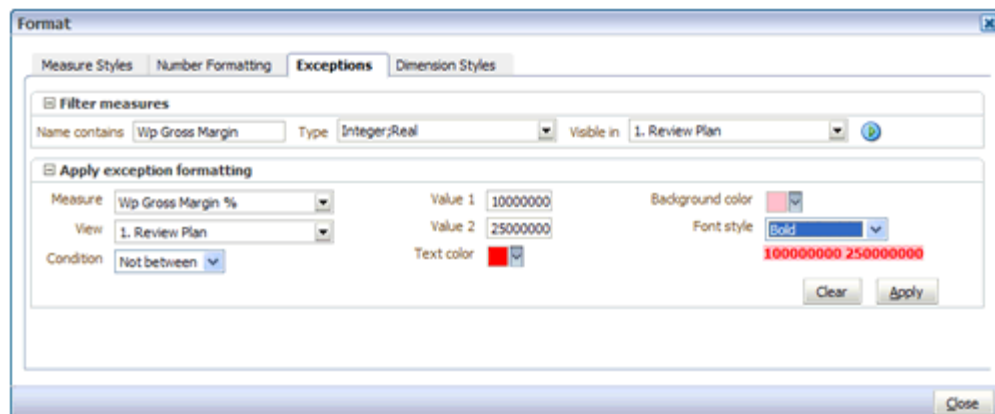
10. When finished, click **Apply** and **Close**. The number formatting is applied to the selected measures in the view.

## Modifying Exceptions

Exception formatting is used for numeric measure types. Exception formatting defines the styles to be applied to a cell's value when it falls outside a defined range.

From the Exceptions tab of the Format dialog box, you can locate measures with the filter feature and then modify the exception formatting for those measures. When the filter feature is not in use, the measures that appear in the **Measure** field within the Apply measure format section shows the numeric measures that are contained in the current view.

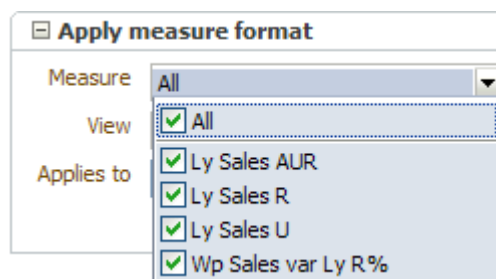
**Figure 5–13** Exceptions Tab of the Format Dialog Box



### Applying Exception Formatting

1. Use the filter to find the measures you want to alter. See [Using the Filter to Find Measures](#).
2. Select the measures you want to alter from the Measure field. You can select one, several, or all.

**Figure 5–14** Select Measures



3. In the **View** field, select the views where these measures appear that you would like to alter.

4. Use the **Condition** and **Value** fields to set the parameters of the exception.
  - In the **Condition** field, select one of three options:
    - **<=**: Use this option to select values that are *less than* or equal to **Value 1**.
    - **>=**: Use this option to select values that are *greater than* or equal to **Value 1**.
    - **Not between**: Use this option to select values that do not fall between **Value 1** and **Value 2**. This is a way to set both the **<=** and **>=** conditions to have the same formatting styles.
  - In the **Value** fields, enter the following:
    - If you chose **<=** or **>=** as the **Condition**, enter the value in **Value 1** that the exception needs to be greater or less than.
    - If you chose **Not between** as the **Condition**, enter the values that the exception should not fall between in **Value 1** and **Value 2**.

---

---

**Note:** Exceptions applied to integer measures must have integer values for **Value 1** and **Value 2**. Otherwise an error occurs.

---

---

5. In the **Text color**, **Background color**, and **Font style** fields, choose the settings you want to apply.

---

---

**Note:** Below the **Font Style** field is an example of how the formatted exception appears.

---

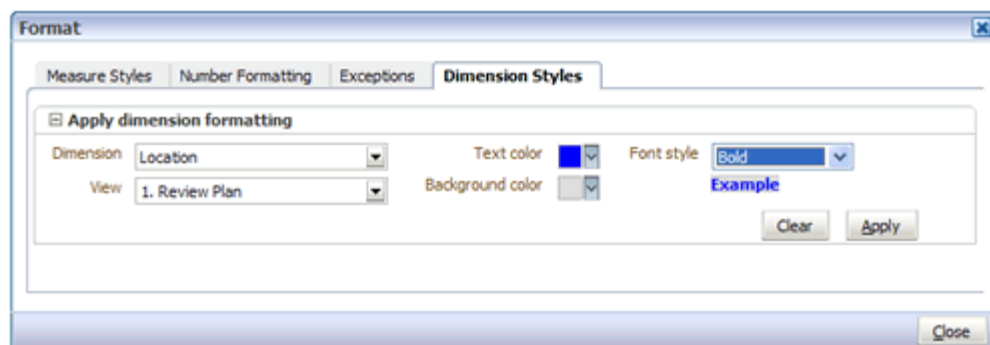
---

6. When finished, click **Apply** and **Close**. The exception formatting is applied to the selected measures in the view.

## Modifying Dimension Styles

From the Dimension Styles tab of the Format dialog box, you can specify header styles for one, a few, or all dimensions. The filter measure feature is not available on this tab because dimension formatting applies only to dimensions, not measures.

**Figure 5–15** Dimension Styles Tab of the Format Dialog Box



### Applying Dimension Styles

1. In the **Dimension** field, select which dimension that you would like to alter. You can select one, a few, or all.

---

**Note:** **Measure** appears as an option in the **Dimension** field. If you choose **Measure** as the dimension, you can set a default header style for measures, but not a default cell style.

---

2. In the **View** field, select the views where these dimension styles should be used.
3. In the **Text color**, **Background color**, and **Font style** fields, choose the settings you want to apply.

---

**Note:** Below the **Font Style** field is an example of how the formatted dimension header appears.

---

4. When finished, click **Apply** and **Close**.

The Format dialog box closes. In the view the new dimension styles are visible.

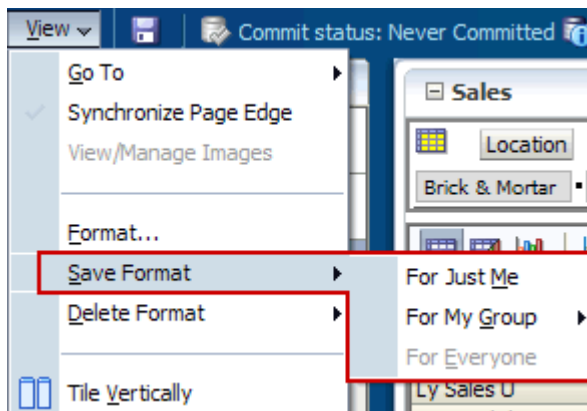
## Saving Formats

The formatting settings you create (including view layouts and other non-data information) are stored along with the workbook in the domain. Because workbook formats are saved just as workbooks are, they can be made available to other users. Saved formats are used when being new workbooks.

There are three availability levels a workbook format can be saved to:

- **For Just Me:** The workbook format is available only to the user who created it.
- **For My Group:** The workbook format is available to all members of the user's group. Users who belong to more than one group can choose which group to make the workbook available to.
- **For Everyone:** The workbook format is available to all users in the organization.

**Figure 5–16 Save Format**



When a new workbook is created, the most specific set of workbook formats that apply are taken as the new workbook format. When a workbook formatting set exists for an availability level (user, group, world), the entire set is taken from that level and applied to the new workbook. For example, if there are user settings for the current user, all workbook formatting from those user settings are applied.

---

**Note:** When a new workbook is created, the user's default group is used for the group availability level check.

---

## Deleting Formats

You can delete formats that you created. To delete a format, perform the following steps.

1. Open the workbook that has the formatting you want to delete.
2. From the View menu, click **Delete Format**.
3. Choose the level you want to delete it from.
  - **For Just Me:** The workbook format is deleted only for the user who created it.
  - **For My Group:** The workbook format is deleted for all members of the user's group.
  - **For Everyone:** The workbook format is deleted for all users in the organization. Only administrators can save for everyone.

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## Working With Charts

You can use the charting feature to generate a visual representation of the data in the form of charts. This section describes the available chart types and provides instructions on the various tasks you can perform with charts. It includes the following sections:

- [Viewing Charts](#)
- [Charts View User Interface](#)
- [Available Chart Types](#)
- [Editing a Chart](#)
- [Customizing a Chart](#)
- [Saving a Chart as an Image](#)

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**Note:** Due to some limitations of Flash, chart axes and labels may not be visible at times and chart sizes may not adjust as expected.

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## Viewing Charts

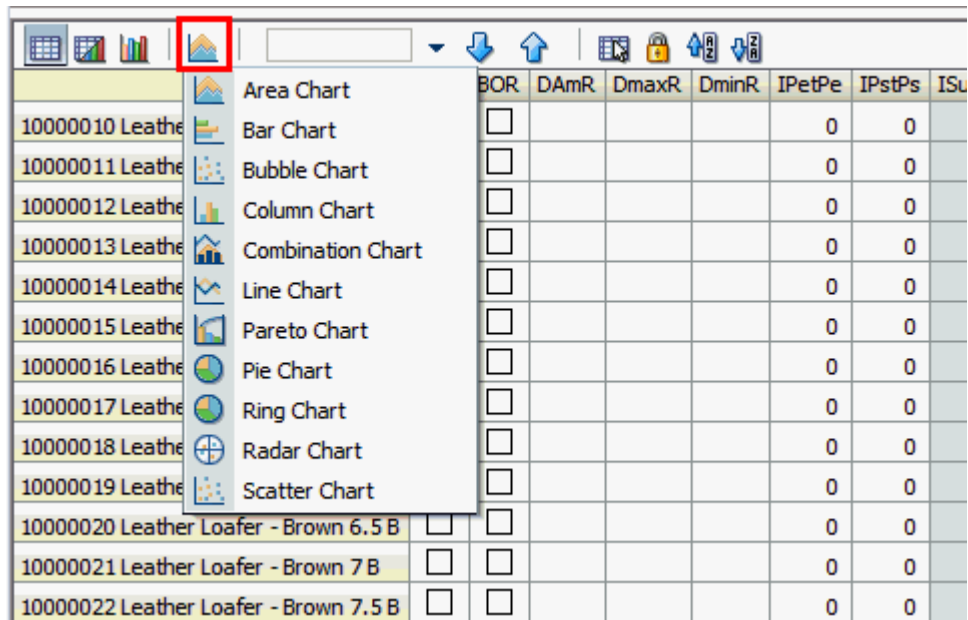
You can view charts using the following views:

- Chart View - In this view, the chart displays in the complete view area.
- Split View - In this view, the chart and data display together in two vertical panels.

To view a chart:

1. Select the data you want for the chart.
2. From the View toolbar, click the **Select Chart Type** button, and then select the chart type.

**Figure 6–1 Select Chart Type Button on the View Toolbar**



3. Once you select the chart type, click one of the following buttons:
  - **Switch to Chart View** – Select this button to switch the view to charts.

**Figure 6–2 Switch to Chart View Button on the View Toolbar**



- **Switch to Split View** – Select this button to see the pivot table and chart split in two vertical panels.

**Figure 6–3 Switch to Split View Button on the View Toolbar**





To switch back to the pivot table, click the **Switch to Pivot Table View** button.

**Figure 6–4** *Switch to Pivot Table View Button on the View Toolbar*



### Cell Selection Considerations

When you choose to view a chart, only the cells that you select are represented in a chart. Each available graph type requires that a specific amount of data or cells are selected for a graph to appear. Although you may select a subset, the cells must contain enough data to support the desired graph for the graph to be displayed. For more information on the information required for each graph type, see [Available Chart Types](#).

### Squaring the Selection

When the chart is rendered on screen, the cell selections in the view are automatically squared. In this operation, additional cells are added to your selection to represent a squared selection area. This ensures that the data is analyzed in a consistent manner.

Let's say you choose to select some cells before viewing a chart, as shown in [Figure 6–5](#) below:

**Figure 6–5** *Example of Cells Selected Before Viewing a Chart*

		FY2004				
		☐ Grocery	☐ Beverages	☐ Soft Drinks	Carbonated	Non-Carbonated
Brick & Mortar	Ly Sales R	0	0	0	0	0
	Wp BOP R	5,122.439	5,122.439	5,122.439	4,010.439	1,112
	Wp Markdowns R	1,540	1,540	1,540	1,026.667	513.333
	Wp Receipts R	4,817	4,817	4,817	3,571.136	1,245.864
	Wp EOP R	6.42	6.42	6.42	0.88	5.54
	Wp Sales R	2,996	2,996	2,996	2,537.703	458.297
Catalog	Ly Sales R	0	0	0	0	0
	Wp BOP R	11,519.431	11,519.431	11,519.431	397.431	11,122
	Wp Markdowns R	230	230	230	104.545	125.455
	Wp Receipts R	833	833	833	264.787	568.213
	Wp EOP R	3.3	3.3	3.3	0.052	3.248
	Wp Sales R	448	448	448	158.345	289.655
E-Commerce	Ly Sales R	0	0	0	0	0
	Wp BOP R	1,258.13	1,258.13	1,258.13	36.13	1,222
	Wp Markdowns R	530	530	530	524.752	5.248
	Wp Receipts R	8,048	8,048	8,048	7,996.064	51.936
	Wp EOP R	31.06	31.06	31.06	30.66	0.4
	Wp Sales R	5,290	5,290	5,290	5,266.757	23.243

Once the chart appears, your selection in the view is squared, as shown in [Figure 6–6](#) below:

**Figure 6–6 Example of Squared Selection After the Chart Appears**

		FY2004				
		Grocery	Beverages	Soft Drinks	Carbonated	Non-Carbonated
Brick & Mortar	Ly Sales R	0	0	0	0	0
	Wp BOP R	5,122.439	5,122.439	5,122.439	4,010.439	1,112
	Wp Markdowns R	1,540	1,540	1,540	1,026.667	513.333
	Wp Receipts R	4,817	4,817	4,817	3,571.136	1,245.864
	Wp EOP R	6.42	6.42	6.42	0.88	5.54
	Wp Sales R	2,996	2,996	2,996	2,537.703	458.297
Catalog	Ly Sales R	0	0	0	0	0
	Wp BOP R	11,519.431	11,519.431	11,519.431	397.431	11,122
	Wp Markdowns R	230	230	230	104.545	125.455
	Wp Receipts R	833	833	833	264.787	568.213
	Wp EOP R	3.3	3.3	3.3	0.052	3.248
	Wp Sales R	448	448	448	158.345	289.655
E-Commerce	Ly Sales R	0	0	0	0	0
	Wp BOP R	1,258.13	1,258.13	1,258.13	36.13	1,222
	Wp Markdowns R	530	530	530	524.752	5.248
	Wp Receipts R	8,048	8,048	8,048	7,996.064	51.936
	Wp EOP R	31.06	31.06	31.06	30.66	0.4
	Wp Sales R	5,290	5,290	5,290	5,266.757	23.243

## Working with Charts

### Charts View User Interface

When switching to the Chart View or Split View, the View toolbar appears with buttons relevant to charts.

**Figure 6–7** Charting Buttons in the View Toolbar



In the Chart View, the following charting buttons appear:

**Table 6–1** Charting Buttons in the View Toolbar

Legend	Button Name	Description
A	Chart Formatting	Enables you to customize the format of the charts. For more information, see <a href="#">Customizing a Chart</a> .
B	Save Chart to Image	Enables you to save the chart as an image (PNG format) file.
C	Flip Chart Axis	Click this button to swap the contents represented on the X and Y axes without manually performing a pivot operation.

### Available Chart Types

The following chart types are available with the Charting feature:

- [Area Chart](#)
- [Column Chart](#)
- [Bubble Chart](#)
- [Bar Chart](#)
- [Combination Chart](#)
- [Line Chart](#)
- [Pareto Chart](#)
- [Pie Chart](#)
- [Ring Chart](#)
- [Radar Chart](#)
- [Scatter Chart](#)

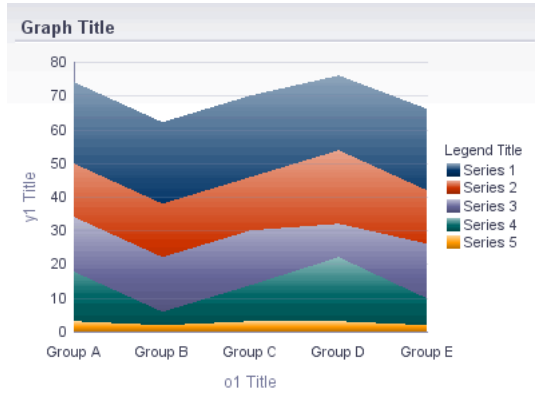
#### Area Chart

In a Area chart the data is represented as a filled-in area. They can be used to show trends over time, such as sales for the past 12 months. Area charts require at least two groups of data along an axis.

Area charts are available in the following types:

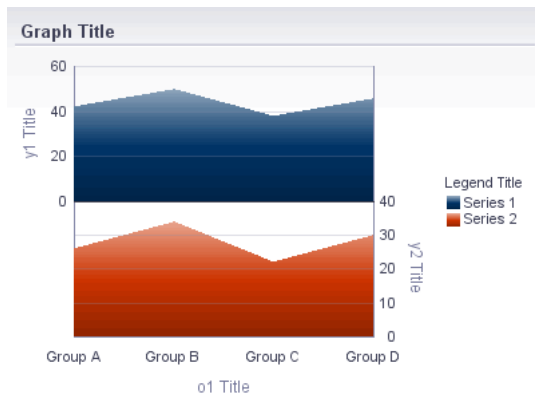
- Absolute Area Chart - Here each area marker connects two data values. This type of chart has the following variations:
  - Absolute Area Chart with a Single Y-Axis

**Figure 6–8 Absolute Area Chart with a Single Y-Axis**



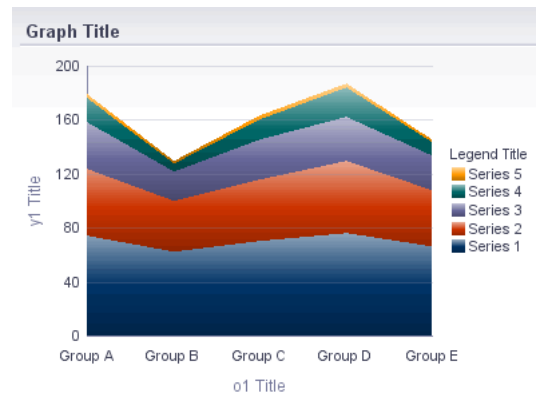
- Absolute Area Chart with a Split Dual Y-Axis

**Figure 6–9 Absolute Area Chart with a Split Dual Y-Axis**



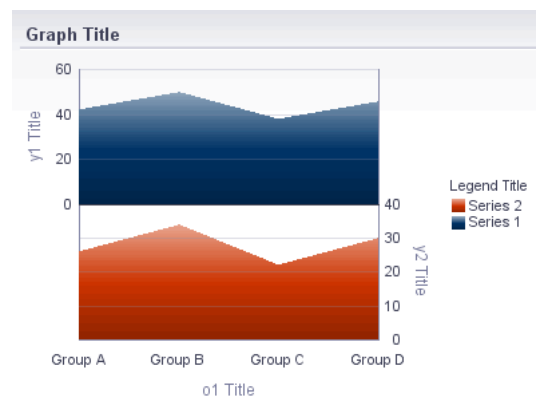
- Stacked Area Chart - Here area markers are stacked and the values of each set of data are added to the values of previous sets. The size of the stack represents a cumulative total. This type of chart has the following variations:
  - Stacked Area Chart with a Single Y-Axis

**Figure 6–10 Stacked Area Chart with a Single Y-Axis**



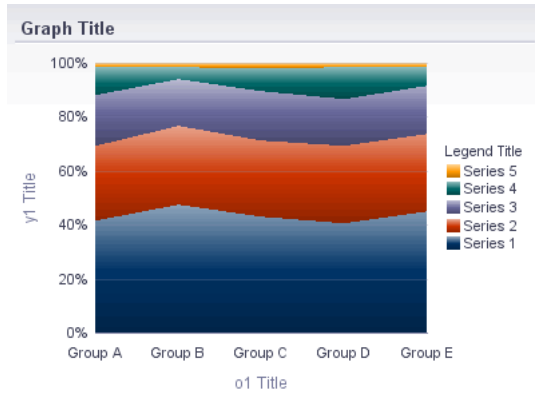
- Stacked Area Chart with a Split Dual Y-Axis

**Figure 6–11 Stacked Area Chart with a Split Dual Y-Axis**



- Percentage Area Chart - Here area markers show the percentage of the cumulative total of all sets of data.

**Figure 6–12 Percentage Area Chart**



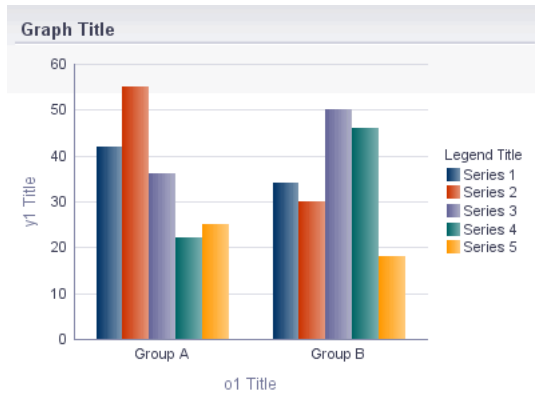
### Column Chart

In a Column Chart the data is represented as a series of vertical bars. They can be used to examine trends over time or compare items at the same time. For example, sales for different product divisions in several groups.

Column Charts are available in the following types:

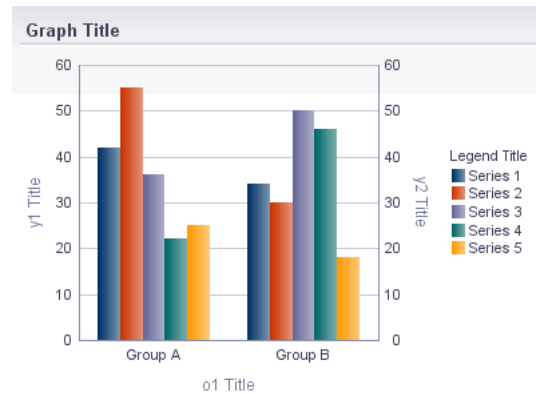
- Clustered Column Chart - Here each cluster of columns represent a group of data. This type of chart has the following variations:
  - Clustered Column Chart with Single Y-axis

**Figure 6–13 Clustered Column Chart with Single Y-axis**



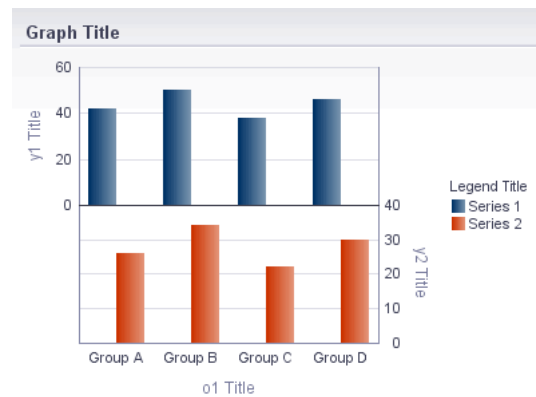
- Clustered Column Chart with Dual Y-axis

**Figure 6–14 Clustered Column Chart with Dual Y-axis**



- Clustered Column Chart with Split Dual Y-axis

**Figure 6–15 Clustered Column Chart with Split Dual Y-axis**



- Stacked Column Chart - Here bars of each set of data are appended to the previous sets of data. The size of the stack represents a cumulative data total. This type of chart has the following variations:
  - Stacked Column Chart with a Single Y-axis

**Figure 6–16 Stacked Column Chart with a Single Y-axis**



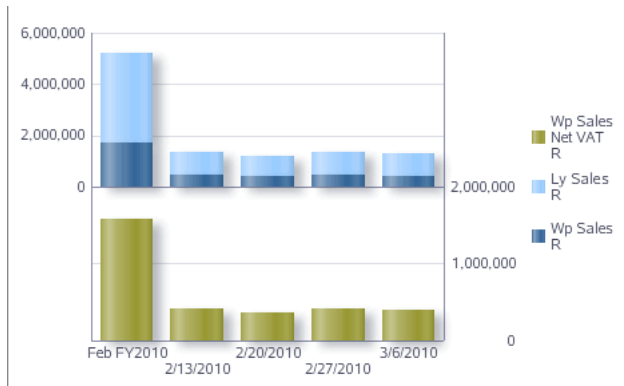
- Stacked Column Chart with a Dual Y-axis

**Figure 6–17 Stacked Column Chart with a Dual Y-axis**



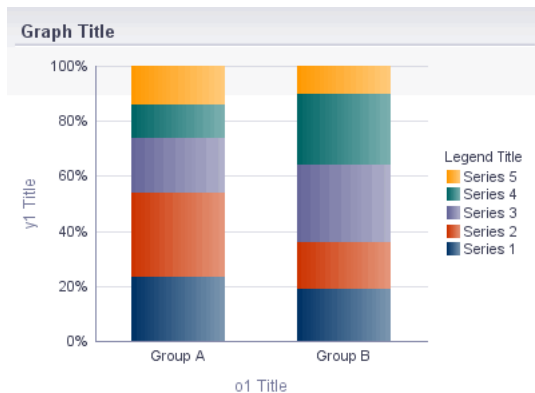
- Stacked Column Chart with a Split Dual Y-axis

**Figure 6–18 Stacked Column Chart with a Split Dual Y-axis**



- Percentage Column Chart - Here bars are stacked and display the percentage of a given set of data relative to the cumulative total of all sets of data. Percentage Column Charts are arranged only with a single Y-axis.

**Figure 6–19 Percentage Column Chart**





## Bar Chart

Bar Charts are similar to the Column Charts, except that the data is represented as series of horizontal columns.

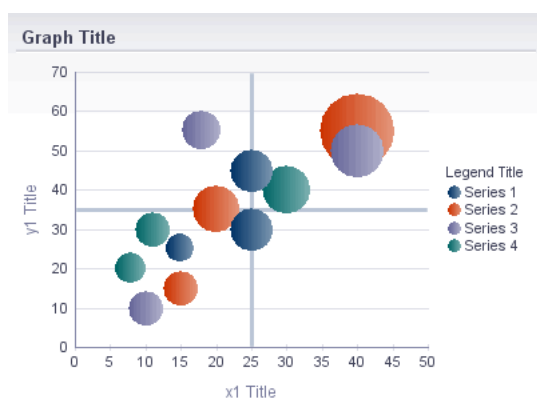
## Bubble Chart

In a Bubble Chart the data is represented by the location and size of round data markers (bubbles). Bubble charts show correlations among three types of values. They can be used when there are a number of data items present and you want see the general relationships. Bubble Charts require at least three data values.

Bubble Charts are available in the following types:

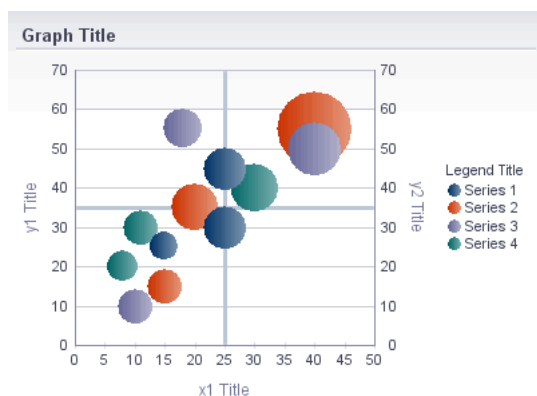
- Bubble Chart with a Single Y-axis

**Figure 6–20** *Bubble Chart with a Single Y-axis*



- Bubble Chart with a Dual Y-axis

**Figure 6–21** *Bubble Chart with a Dual Y-axis*



### Combination Chart

The Combination Chart uses three different types of data markers to display different kinds of data items. They can be used to compare bars and lines, bars and areas, lines and areas, or all three combinations. Combination charts require at least two groups of data for the chart to render an area marker or a line marker.

Combination Charts are available in the following types:

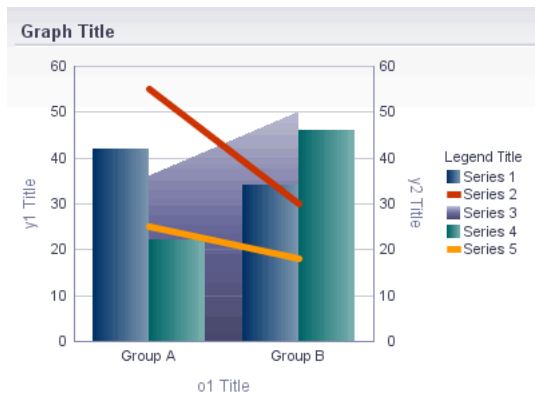
- Combination Chart with Single Y-axis

**Figure 6–22** *Combination Chart with Single Y-axis*



- Combination Chart with Dual Y-Axis

**Figure 6–23** *Combination Chart with Dual Y-Axis*



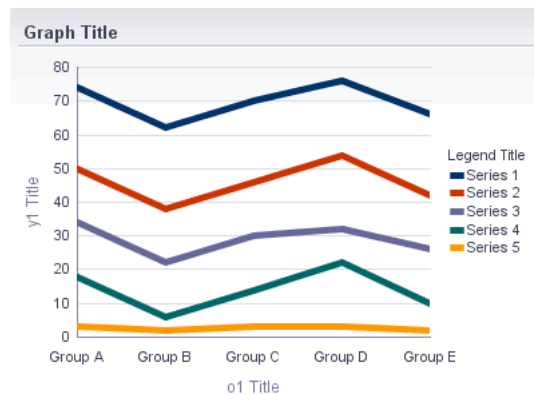
## Line Chart

In a Line Chart the data is represented as a line, series of data points, or data points connected by a line. Line Charts require data for at least two points for each member in a group.

Line Charts are available in the following types:

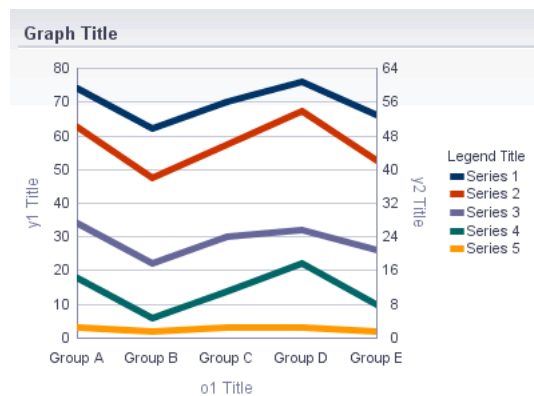
- Absolute Line Chart - Here each line segment connects two data points. This type of chart has the following variations:
  - Absolute Line Chart Single Y-axis

**Figure 6–24 Absolute Line Chart Single Y-axis**



- Absolute Line Chart Dual Y-axis

**Figure 6–25 Absolute Line Chart Dual Y-axis**



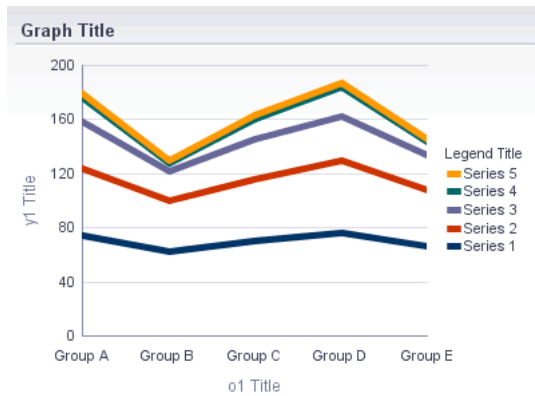
- Absolute Line Chart Split Dual Y-axis

**Figure 6–26 Absolute Line Chart Split Dual Y-axis**



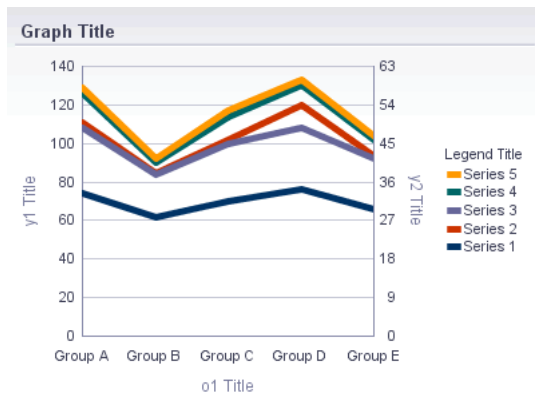
- Stacked Line Chart - Here each set of data is appended to previous sets of data. The size of the stack represents a cumulative data total. This type of chart has the following variations:
  - Stacked Line Chart Single Y-axis

**Figure 6–27 Stacked Line Chart Single Y-axis**



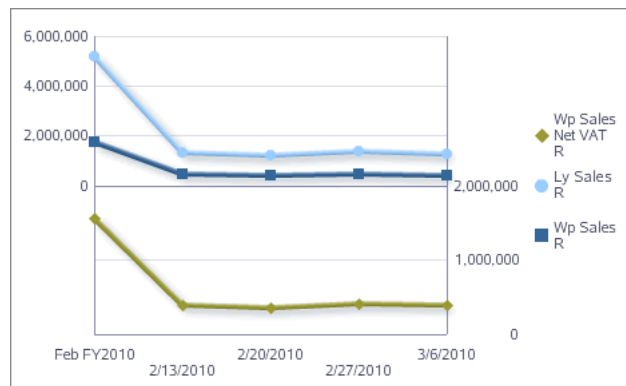
- Stacked Line Chart Dual Y-axis

**Figure 6–28 Stacked Line Chart Dual Y-axis**



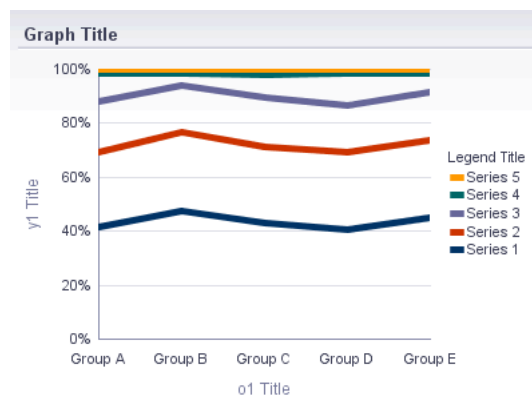
- Stacked Line Chart Split Dual Y-axis

**Figure 6–29 Stacked Line Chart Split Dual Y-axis**



- Percentage Line Chart - Here the lines are stacked and each line shows the percentage of the given set of data relative to the cumulative total of all sets of data. Percentage Line Charts are arranged only with a single Y-axis.

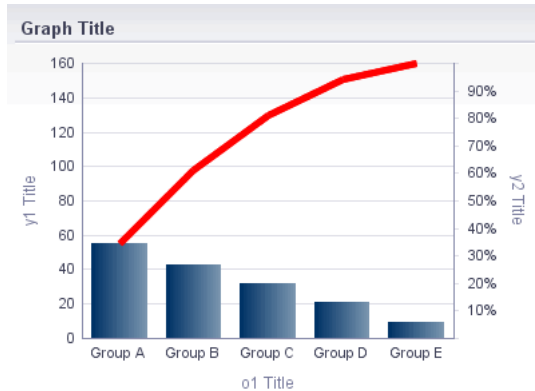
**Figure 6–30 Percentage Line Chart**



### Pareto Chart

In a Pareto Chart the data is represented by bars and a percentage line that indicates the cumulative percentage of bars. Bars are arranged by value from left to right, from the largest to the lowest. A Pareto Chart is always a Dual Y-axis chart. The first Y-axis corresponds to values that the bars represent and the second Y-axis runs from 0-100% and represents the cumulative percentage values.

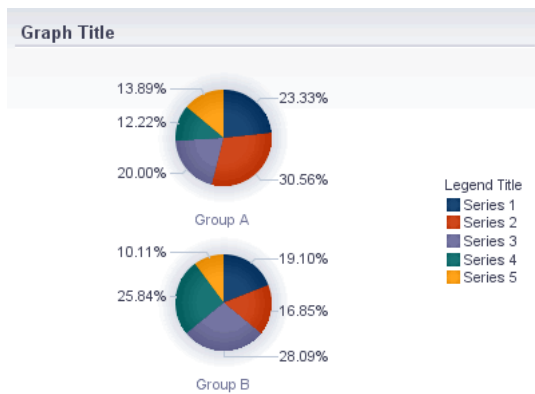
**Figure 6–31 Pareto Chart**



### Pie Chart

In a Pie Chart the data is represented as sections of a circle. Pie charts can be used to show the relationship of parts to a whole.

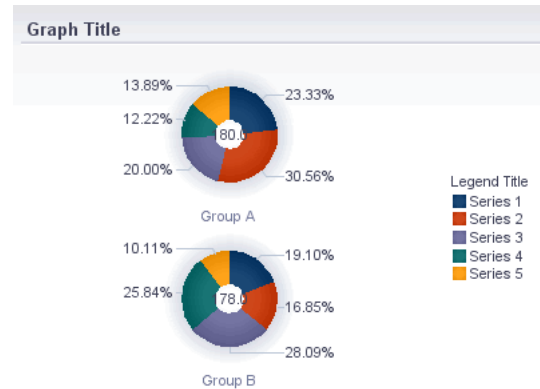
**Figure 6–32 Pie Chart**



## Ring Chart

Ring Charts are similar to the Pie Chart, except that the center of each circle displays the total pie value.

**Figure 6–33 Ring Chart**



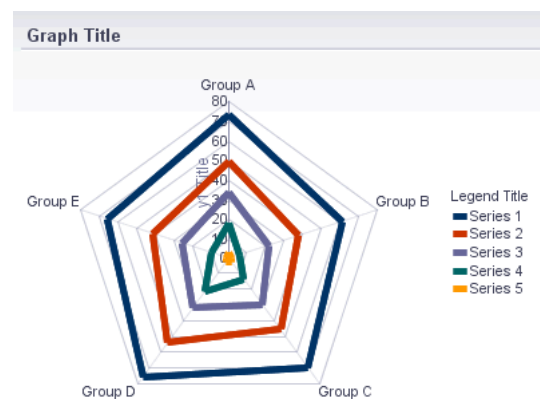
## Radar Chart

In a Radar Chart the data is represented in a polygon layout. They are used to show patterns that occur in cycles, such as monthly sales for last three years.

The data structure of a Radar Chart is:

- Number of sides on the polygon is equal to the number of groups of data. Each corner of the polygon represents a group.
- A series or set of data is represented by a line, markers of the same color, or both (labeled by legend text).

**Figure 6–34 Radar Chart**



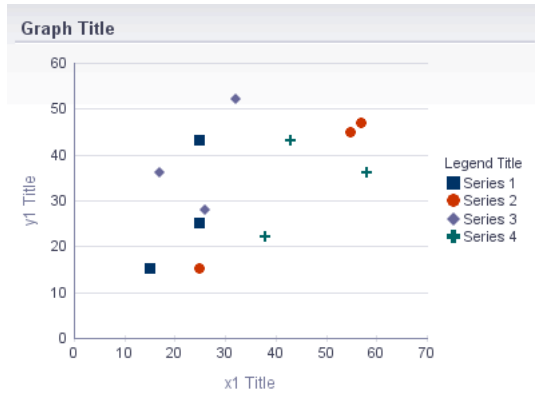
### Scatter Chart

In a Scatter Chart the data is represented by the location of data markers. Scatter Charts can be used to show the correlation between two different kinds of data values.

Scatter Charts are available in the following types:

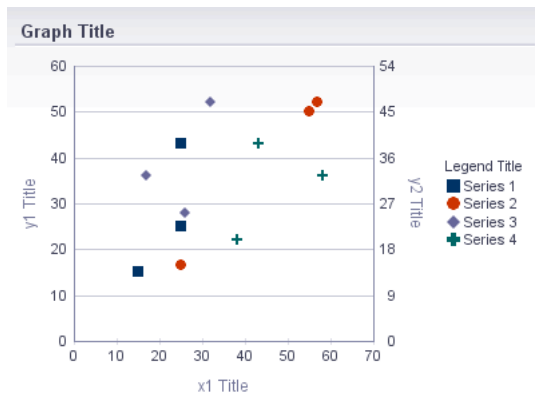
- Scatter Chart with a Single Y-Axis

**Figure 6–35 Scatter Chart with a Single Y-Axis**



- Scatter Chart with a Dual Y-Axis

**Figure 6–36 Scatter Chart with a Dual Y-Axis**





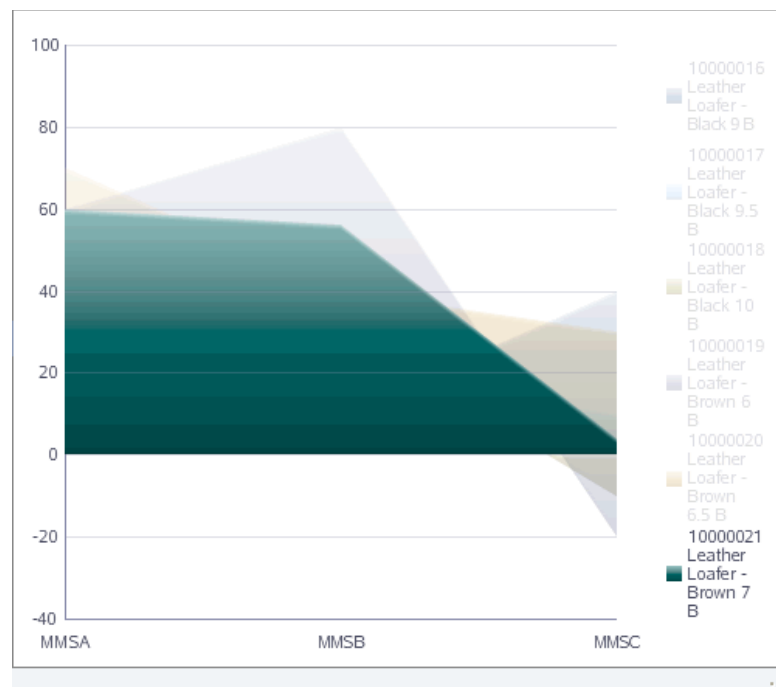
## Editing a Chart

Once the chart appears on screen, you can update the value of a specific series simply by clicking the series in the chart.

To edit a chart:

1. In the chart, select the value for the specific series represented in the chart using the following steps:
  - a. Hover the mouse cursor over the series or the legend, the specific series gets highlighted automatically and the other series are dimmed. See [Figure 6-37](#).

**Figure 6-37 Example of a Series Highlighted in Area Chart.**




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**Note:** This is configurable setting and can be toggled on or off in the properties file. For more information, refer to the *RPAS Administration Guide for the Fusion Client*.

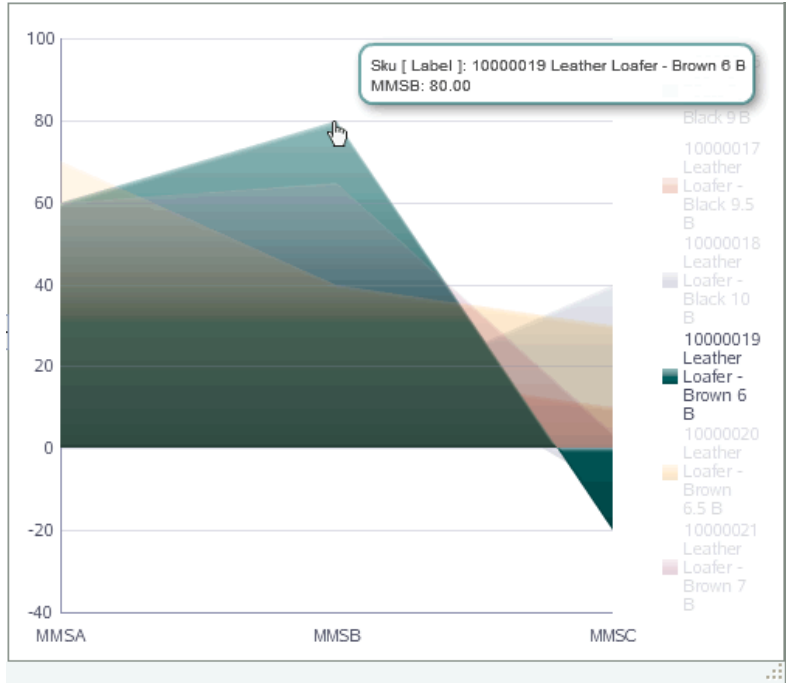
---

- b. Once the series is highlighted, locate the value you want to edit on the chart, and select the relevant area based on the following:

Chart Type	Area to Select
Area Chart	Click the specific point (indicated by tool-tip pop-up).
Bar Chart	Click the bar area.
Bubble Chart	Click the bubble.
Column Chart	Click the column area.
Combination Chart	Click the relevant area based on chart type. Refer to the area for Area, Column, and Line Charts.
Line Chart	Click the specific point on the line (indicated by line marker).

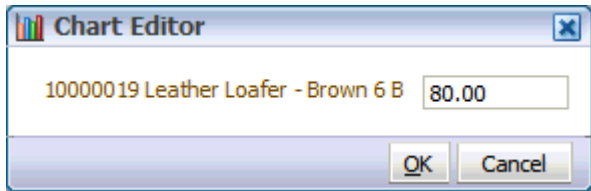
Chart Type	Area to Select
Pareto Chart	Click the column or by the pareto line marker.
Pie Chart	Click the slice.
Radar Chart	Click the line marker point.
Ring Chart	Click the slice.
Scatter Chart	Click the scatter marker (shape).

**Figure 6–38 Example of Value to be Selected in the Area Chart**



The Chart Editor window appears.

**Figure 6–39 Chart Editor Window**



2. Enter the new value and click **OK**. The chart and the view data get updated with the new value.

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**Note:** Editing chart values also follow the cell editing and protection processing rules. Read-only values will not be editable.

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## Customizing a Chart

In Chart View, the View toolbar includes the *Chart Formatting* button that enables you to use the formatting options and customize the chart.

To customize the chart:

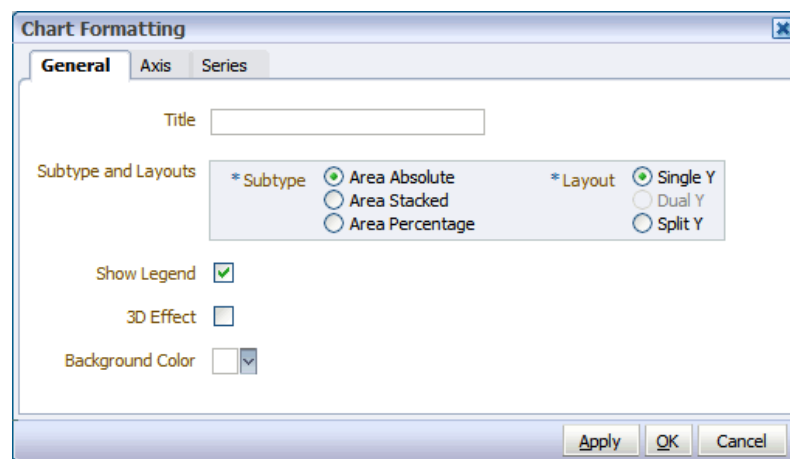
1. In the **Chart View**, click the **Chart Formatting** button in the View toolbar.

**Figure 6–40** *Chart Formatting Button in the View Toolbar*



The **Chart Formatting** window appears.

**Figure 6–41** *Chart Formatting Window*



2. In the **Chart Formatting** window, make the relevant changes. For more information on the Chart Formatting window, see [Understanding the Chart Formatting Window](#).
3. Click the **Apply** button to apply the changes and continue customizing your chart. When you click the Apply button, the changes take effect immediately in the background.
4. Once all the changes are done, click the **OK** button. When you click the OK button the changes are applied to the chart and the Chart Formatting window closes.

### Understanding the Chart Formatting Window

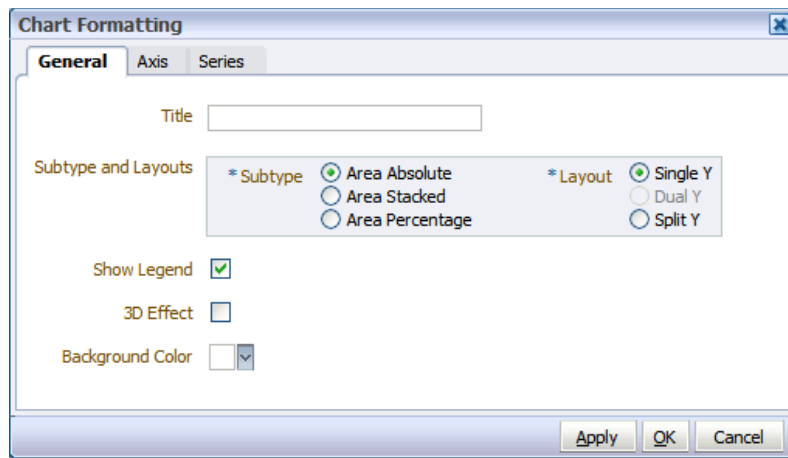
The Chart Formatting window includes the following tabs:

- [General Tab](#)
- [Axis Tab](#)
- [Series Tab](#)

## General Tab

The General tab enables you to customize the general settings for the chart

**Figure 6–42 General Tab on the Chart Formatting Window**



The General tab includes the following fields:

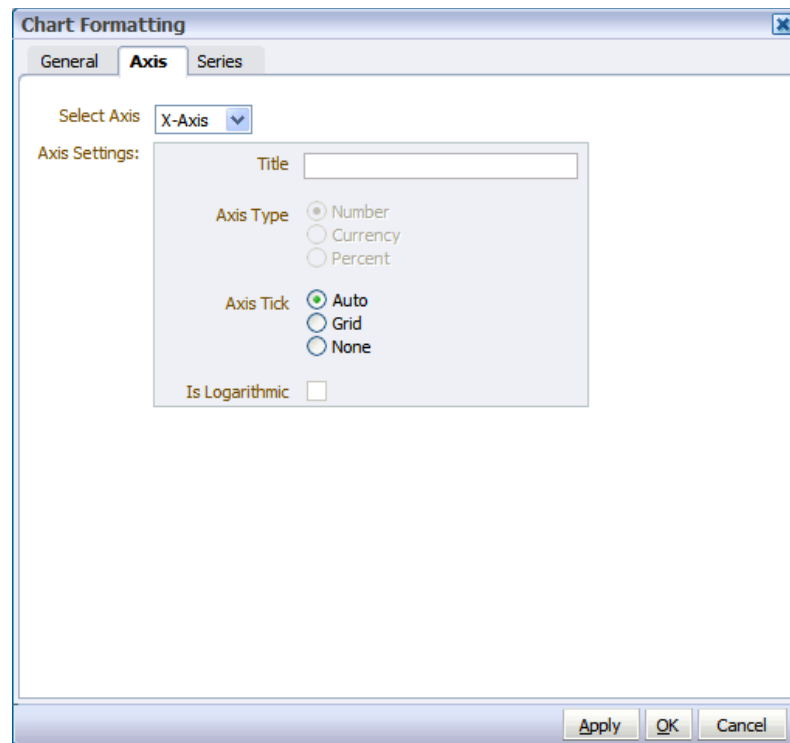
**Table 6–2 Fields on the General Tab**

Field	Description
Title	Enables you to set a title to the chart.
Subtype and Layouts	<p>Based on the chart, this section enables you to select a subtype and layout.</p> <p>Subtype Selection includes the following options:</p> <ul style="list-style-type: none"> <li>■ Absolute (applies to Area, Bar, and Line Chart)</li> <li>■ Stacked (applies to Bar and Line Chart)</li> <li>■ Percentage (applies to Area, Bar, and Line Chart)</li> <li>■ Is Horizontal (Bar only)</li> </ul> <p>Layout Selection includes the following options</p> <ul style="list-style-type: none"> <li>■ Single Y (applies to the Bubble, Scatter, and all Absolutes/Stacked types)</li> <li>■ Dual Y (applies to the Bubble, Scatter, and all Absolutes/Stacked types)</li> <li>■ Split Y (applies to all Absolutes and Stacked types)</li> </ul>
Show Legend	Select this check box to display a legend on the chart.
3D Effect	Select this check box to display the chart in 3-D.
Background Color	Enables you to select a background color for the chart.

## Axis Tab

The Axis tab enables you to customize the axes settings.

**Figure 6–43** Axis Tab on the Chart Formatting Window



The Axis tab includes the following fields:

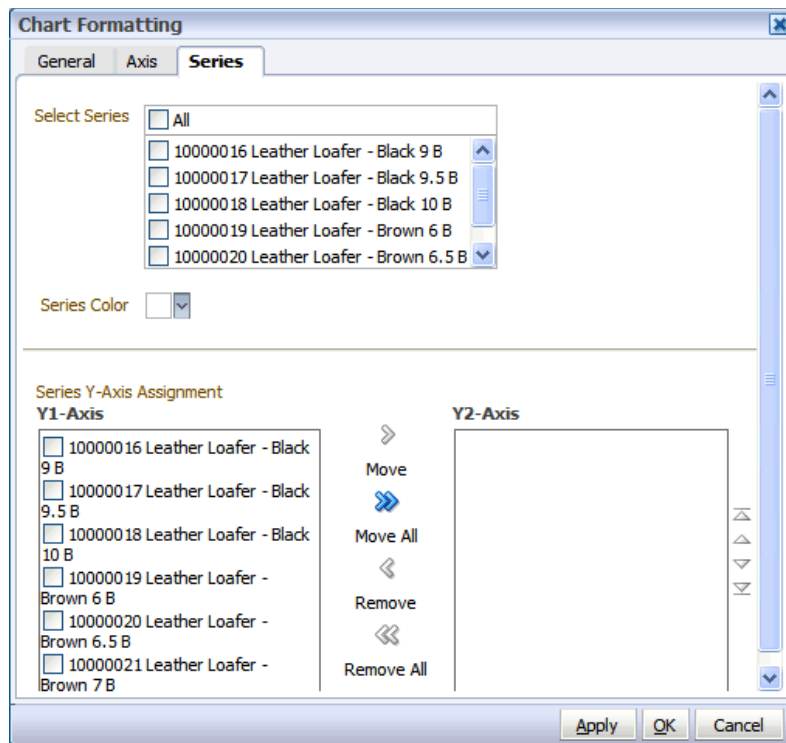
**Table 6–3** Fields on the Axis Tab

Field	Description
Select Axis	Based on the type of chart, displays the axes for the chart. You can select each axes and set the parameters in the Axis Settings section.
<b>Axis Settings</b>	
Title	Enables you to set a title for the axis.
Axis Type	Enables you to set the data type for the axis. You can choose from the following options <ul style="list-style-type: none"> <li>■ Number (does not apply for percentage type graphs).</li> <li>■ Currency (does not apply for percentage type graphs).</li> <li>■ Percentage (automatic on percentage type graphs).</li> </ul>
Axis Tick	Enables you to show or hide grid lines within the chart. Select from the following options: <ul style="list-style-type: none"> <li>■ Auto</li> <li>■ Grid</li> <li>■ None</li> </ul>
Is Logarithmic	Changes the axis to use a logarithmic scale when plotting data.

**Series Tab**

The Series tab enables you to set the series color and Y-axis assignment.

**Figure 6–44 Series Tab on the Chart Formatting Window**



The Series tab includes the following fields:

**Table 6–4 Fields on the Series Tab**

Field	Description
Select Series	Displays the series that appear in the chart.
Series Color	Enables you to set a color for the series selected in the Select Series section.
Series Y-Axis Assignment	Enables you to Move/Move All/Remove/Remove All buttons and assign series to the Y1 and Y2 axes.

## Saving a Chart as an Image

In Chart View, the View toolbar includes the **Save Chart to Image** button that enables you to save the chart as an image (in PNG format).

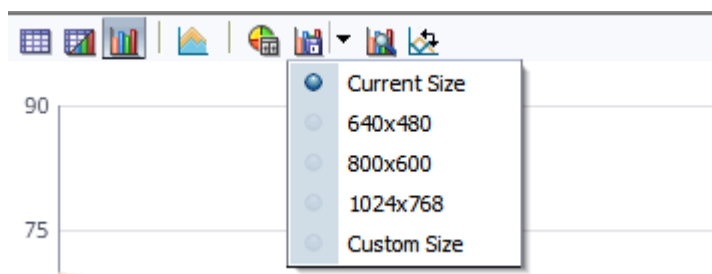
**Figure 6–45** Save Chart to Image Button on the View Toolbar



To save the chart as an image:

1. In the **Chart View**, click the drop-down arrow on the **Save Chart to Image** button, and select the image resolution.

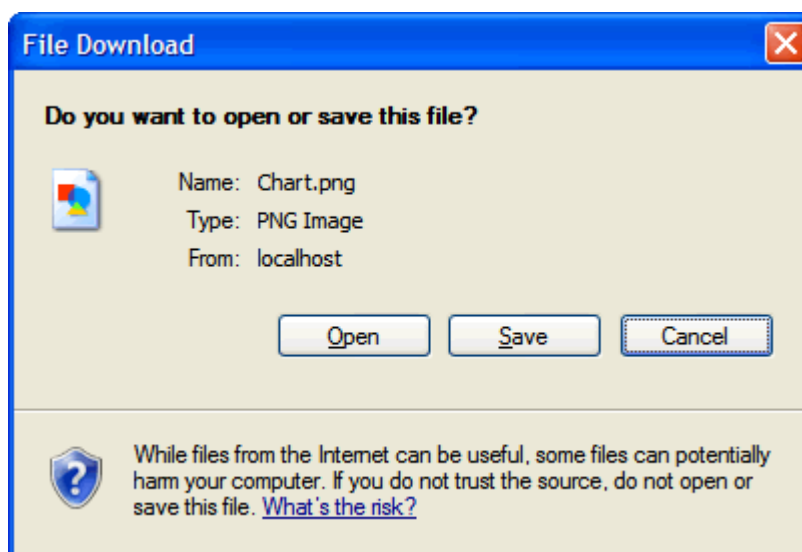
**Figure 6–46** Drop-down Menu on the Save Chart to Image Button



2. Click the **Save Chart to Image** button to save the image.
3. The File Download dialog box appears. Click **Open** or **Save** as shown in [Figure 6–47](#).

Clicking **Open** opens the chart as a PNG file. Clicking **Save** allows you to select a location to save the file.

**Figure 6–47** File Download Dialog Box







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## Sort and Find

Easily sorting and finding data is essential when working with workbooks that contain thousands of items, hundreds of locations, and an endless number of dates. Being able to put this data in a logical order or find a specific piece of information is what makes planning possible.

This chapter describes the ways you can sort and find data:

- [Sort](#)
  - [Simple Sort](#)
  - [Attribute Based Sort](#)
- [Find](#)

### Sort

There are two kinds of sort: simple and attribute sort. Both allow you to put the data in a meaningful order.

#### Simple Sort

You can sort positions in a level by using the sort icons on the toolbar or the arrows that appear on column headers. The positions are sorted based on the values of a measure's slice for that level. This sorting can be done without defining additional attributes.

The sort occurs along a single measure, using only a single level in the sort. The sorting is limited to the current view, thus providing the user an ability to see the same data sorted differently in different views. Sorting is only available in the pivot table or split view. It is not available in the graph view.

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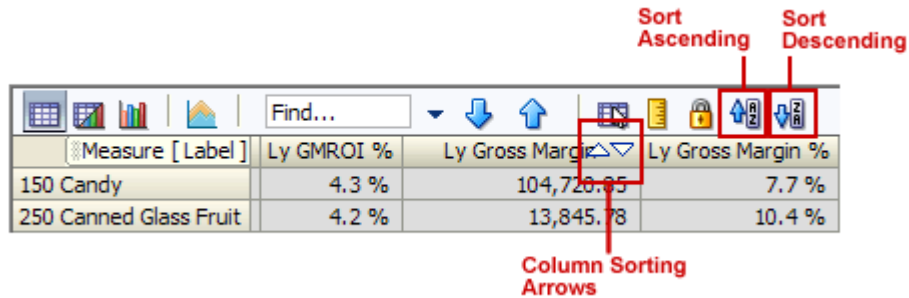
**Note:** A slice is valid if it involves only one measure and if it has a unique value for each position along the level being sorted (meaning that one position along all other dimensions in the measure's intersection has been selected).

---

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Once you have selected the desired valid slice of measure data that you want to sort, the sorting buttons are enabled on the toolbar and in the columns, as shown in [Figure 7-1](#).

**Figure 7-1 Sort Buttons**



Once you click one of the sort buttons, the selected positions are sorted according to the measure's values in the selected slice.



The Sort Ascending icons in the toolbar and columns order the data so that the lowest number appears at the top of the list and the highest at the bottom. Once the data is sorted, the column header is shaded gray and the Sort Ascending arrow is shaded blue, as shown in [Figure 7-2](#).

**Figure 7-2 Sort Ascending**

	Ly COGS C	Ly Cum Avg Inv R	
800 Yogurt	19,445.44		79,050.00
350 Fresh Fruit	61,200.00		252,750.00
900 Personal Care	65,205.77		288,400.00
250 Canned Glass Fruit	118,754.22		430,250.00
750 Books Reference	57,550.00		1,065,500.00
650 Home Decor	54,900.00		1,600,400.00
450 Home Theater	123,650.00		2,588,100.00
150 Candy	1,251,979.15		3,849,450.00
550 Paint	286,487.40		6,714,400.00
700 Electronics	2,480,838.78		393,497,021.92

The Sort Descending buttons order the data so that the largest number is at the top. Again, once the data is sorted, the column header is shaded gray and the Sort Descending arrow is shaded blue (Figure 7-3).

**Figure 7-3 Sort Descending**

	Ly COGS C	Ly Cum Avg Inv R	
700 Electronics	2,480,838.78	393,497,021.92	
550 Paint	286,487.40	6,714,400.00	
150 Candy	1,251,979.15	3,849,450.00	
450 Home Theater	123,650.00	2,588,100.00	
650 Home Decor	54,900.00	1,600,400.00	
750 Books Reference	57,550.00	1,065,500.00	
250 Canned Glass Fruit	118,754.22	430,250.00	
900 Personal Care	65,205.77	288,400.00	
350 Fresh Fruit	61,200.00	252,750.00	
800 Yogurt	19,445.44	79,050.00	

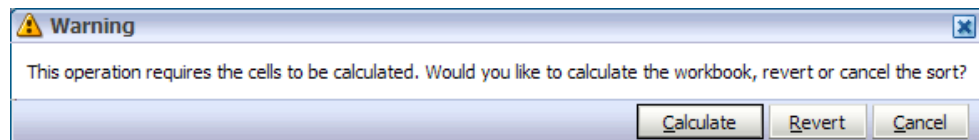
Sorting should reapply after operations that do not change the data. If you show or hide positions, change the rollup, or switch the mode from outline to block view or vice-versa, you should reapply the sort. Since a pivot operation resets the selected sort slice, you must reselect a valid slice and sort again.

If you use the View Attributes and Sort tab to perform a attribute sort, the simple sort is overridden. Previous sorts (either attribute-based or simple sort-based) are not maintained after a new simple sort.

Data editing operations like calculate, update, or refresh do not reapply the sort, and the positions remain in the last sorted order.

If you edit a cell and attempt to sort using the toolbar icon, a message appears that states the edited cells need to be calculated before the sort operation can take place.

**Figure 7-4 Uncalculated Cells Warning Message**



You can choose to calculate, revert, or cancel:


- **Calculate:** The positions are sorted after the calculate operation is performed.
- **Revert:** The edits are reverted and the sort is performed.
- **Cancel:** The sort operation is canceled.

If you have edited the cells and attempt to sort using the column header icon, the page refreshes without applying the sort and the header no longer displays the icon to sort. If you perform other operations such as show/hide after the edits that have caused the page to refresh, the sort icon does not appear in the column header until the edited cells are calculated.

## Sorting By Column Headers


You can sort data by mousing over the pivot table column headers to make the ascending and descending sort icon appear.

**Figure 7-5 Sort Icons in Column Header**

Ly COGS C 
1,251,979.15
118,754.22
61,200.00
123,650.00

Click one to sort the positions along the row-edge based on the values of a measure's slice for that dimension. The column is highlighted and the column header displays a selected sort icon (ascending or descending) based on the sort direction.

**Figure 7-6 Sort Icons in Column Header After Sort**

Ly COGS C 
2,480,838.78
1,251,979.15
286,487.40
123,650.00

The sort icons do not appear on the column headers if the slice (with the selected column) is invalid. For example, when the measures are on the row edge, the sort icons do not appear on the column headers. Also, when there is more than one dimension on the column axis, the sort icons appear only on the inner layer.

## Sorting with the Toolbar Buttons

The sort buttons in the toolbar are enabled if there is a valid slice involving a single measure being selected. Select either a column or row and click the one of the sort buttons. The toolbar buttons are more useful for sorting the rows.

**Figure 7-7 Sort Icons in Toolbar**

	700 Electronics	150 Candy	550 Paint	450 Home Theater
Ly COGS C	2,480,838.78	1,251,979.15	286,487.40	123,650.00
Ly Gross Margin	85,161.22	104,720.85	476,712.60	65,350.00
Ly Gross Margin %	16.4 %	7.7 %	62.5 %	34.6 %

The selected position is sorted according to the measure's values in the selected slice. If the rows were sorted, the row just appears selected. If a column was selected, a sort icon appears in the column header.

If you select an invalid slice, for instance, multiple rows or columns are selected, the sort icons are enabled but clicking them results in an error message that states the selected slice is not a valid slice for sorting.

## Sorting in Outline Mode and Block Mode

You can sort in either the outline or block mode. Sorting in the outline mode sorts all the positions as well as the positions within those positions. Sorting in block mode, however, only sorts the highest aggregate position.

**Outline Mode** If the pivot table is in outline mode, that is, it is displaying aggregate levels of the dimension in separate rows or columns in the same grid, the aggregate positions are sorted as well as the positions within the aggregate positions.

In [Figure 7-8](#), note how the 100 Non-food Consumers Goods position is listed first because it is larger than both the 300 Food and 200 Decor groups. Then, within the Non-food group, the departments are listed in order of greatest to least, 700 Electronics being the largest of all the departments.

**Figure 7-8** *Sorting in Outline Mode*

	Ly COGS C ▲▼
[-] 100 Non-food Consumer Goods	2,727,244.55
700 Electronics	2,480,838.78
450 Home Theater	123,650.00
900 Personal Care	65,205.77
750 Books Reference	57,550.00
[-] 300 Food	1,451,378.81
150 Candy	1,251,979.15
250 Canned Glass Fruit	118,754.22
350 Fresh Fruit	61,200.00
800 Yogurt	19,445.44
[-] 200 Decor	341,387.40
550 Paint	286,487.40
650 Home Decor	54,900.00

**Block Mode** If the pivot table is in block mode, that is, it is displaying the dimension levels in separate rows or columns but not the aggregate levels, the simple sort still orders the aggregate levels as well as the dimension levels within them.

In [Figure 7-9](#), note how the 100 Non-food Consumers Goods, 300 Food, and 200 Decor groups do not have an aggregated number in the column. Nevertheless, the groups are still ordered greatest to least as are the departments within those groups.

**Figure 7-9** *Sorting in Block Mode*

		Ly COGS C ▲▼
[-] 100 Non-food Consumer Goods	700 Electronics	2,480,838.78
	450 Home Theater	123,650.00
	900 Personal Care	65,205.77
	750 Books Reference	57,550.00
[-] 300 Food	150 Candy	1,251,979.15
	250 Canned Glass Fruit	118,754.22
	350 Fresh Fruit	61,200.00
	800 Yogurt	19,445.44
[-] 200 Decor	550 Paint	286,487.40
	650 Home Decor	54,900.00

## Sorting Across Page Edge

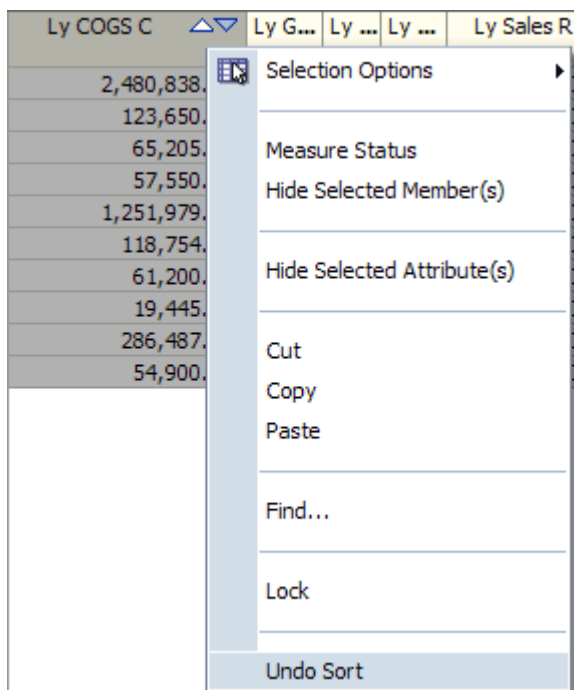
Since the positions are sorted on a specific slice, the positions stay in the previously sorted order as you page through the positions along the page-axis. The positions are not resorted based on the new selections in the page-axis.

Simple sort cannot be applied to positions in a dimension along the page axis. However, you can pivot the desired dimension to either row or column axes, execute the sort along the desired slice, and then pivot the sorted dimension back to the page axis.

## Undo Sort Using the Context Menu

If you want to undo a sort, right-click and select Undo Sort from the right-click context menu.

**Figure 7–10** Undo Sort in Context Menu



You do not need to select the exact slice; any slice on the sorted dimension renders the **Undo Sort** option. Once you select the **Undo Sort** option, the simple sort is no longer applied and the positions appear in the original sort order that was shown when the view was first opened.

## Attribute Sorting

An attribute is a piece of information that further describes a position at a given level. For example, the SKU level of the product dimension could have three attributes associated with it: label, color, and price. This means, any SKU in this product dimension could have attribute values of:

- LABEL: SKU00012 - Cashmere Sweater
- COLOR: Pale Blue
- PRICE: \$62

Label is the only attribute that is required, but positions in a level can be described with any number of attributes. Once established, attributes can be displayed in the view if desired. The dimension's attributes can also be used to decide display sort order for positions within that level.

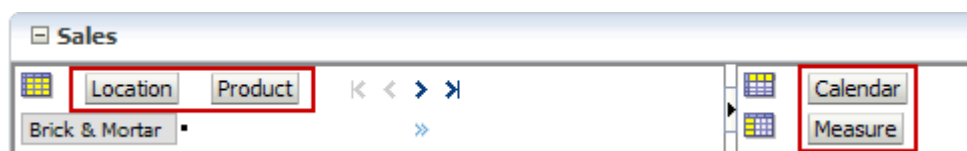
But before you can sort by attributes, you need to select the desired attributes to appear in the view.

### Select Attributes for Display

To see the available attributes that you can sort by, perform the following.

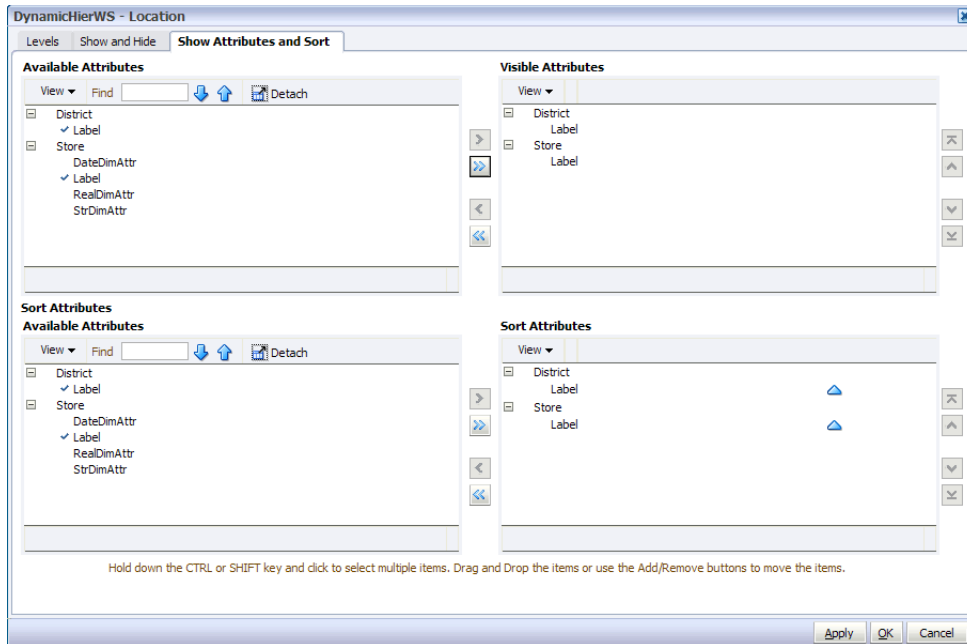
1. In an open view, click the dimension tile of the dimension which you want to sort by an attribute. In [Figure 7-11](#), the Location dimension has been selected.

**Figure 7-11** Dimension Tiles



2. The Dimension window appears. Click the Show Attributes and Sort tab.
3. In the Show Attributes and Sort tab, the available attributes for the dimension are listed in both the Available Attributes and Sort Attributes sections on the left. The attributes currently shown in the view are listed on the right. Those shown attributes have a check mark beside them.

**Figure 7–12 Show Attributes and Sort Tab**



- a. Select the attributes that you want to appear in the view from the Available Attributes section at the top.
- b. Either click the right arrow to move the attribute to the Visible Attributes box on the right side, or drag the attribute to the right side.
- c. Repeat the same process for the attributes you want to sort by moving them to the Sort Attributes section at the bottom.
- d. When finished, click **OK**. This saves your changes and closes the Dimension window.

If you want to make additional changes on other tabs in the Dimension window, click **Apply** instead. This saves your changes but leaves the Dimension window open so you can go to other tabs.

The attributes now appear in the workbook as shown in [Figure 7–13](#).

**Figure 7–13 Attributes Shown in a View**

		Dec, FY2009			
		Store (Fmt)	12/19/2009	12/26/2009	12/12/2009
1	RETAIL CORP.		0.0	0.0	0.0
S1	SOUTHERN EUROPE		0.0	0.0	0.0
33	FRANCE	7	0.0	0.0	0.0
	0102 STRASBOURG	MALL	0.0	0.0	0.0
	0296 BORDEAUX	MALL	0.0	0.0	0.0
	0557 TOULOUSE	SUBURB	0.0	0.0	0.0
	0593 NICE	MALL	0.0	0.0	0.0
	0711 MARSEILLES	CITY	0.0	0.0	0.0
	0804 LYON	MALL	0.0	0.0	0.0
	0959 PARIS	MALL	0.0	0.0	0.0



## Displaying Attributes in Views

In the Fusion Client, you can display attributes in both the outline and block views.

### Outline View

In the outline view, you can view the attributes in either the row edge or the column edge. In outline view, for each dimension, the first layer displays attributes with display order 1 merged across levels. This layer also features the expand/collapse (+/-) icons. By default, beyond first layer, each displayed attribute is rendered as a separate layer.

**Views** You can view attributes in two places in the outline view: row edge and column edge.

**Figure 7–14 Outline View: Attributes in Row Edge**

		Dec, FY2009		
		12/19/2009	12/26/2009	12/12/2009
1	RETAIL CORP.			
51	SOUTHERN EUROPE	0.0	0.0	0.0
33	FRANCE	7	0.0	0.0
	0102 STRASBOURG	MALL	0.0	0.0
	0296 BORDEAUX	MALL	0.0	0.0
	0557 TOULOUSE	SUBURB	0.0	0.0
	0593 NICE	MALL	0.0	0.0
	0711 MARSEILLES	CITY	0.0	0.0
	0804 LYON	MALL	0.0	0.0
	0959 PARIS	MALL	0.0	0.0

**Figure 7–15 Outline View: Attributes in Column Edge**

		33 FRANCE		0102 STRASBOURG
		6		CITY
Dec, FY2009	12/19/2009	0.0	0.0	0.0
	12/26/2009	0.0	0.0	0.0
	12/12/2009	0.0	0.0	0.0
	1/9/2010	0.0	0.0	0.0
	1/2/2010	0.0	0.0	0.0
Nov, FY2009	11/21/2009	0.0	0.0	0.0

When in the outline view, the default ordering of displayed attributes across levels is from higher to lower levels. For example, the attribute from higher district level is displayed first followed by lower store level.

For each dimension, the first layer always features the expand/collapse (+/-) icons. In addition, the label itself is an attribute, and you can choose to display it in any order or hide it altogether (as long as there is at least one attribute displayed for each level). For example, you can choose the label attribute for both the store and district levels as second in display order, with SKU Label reordered before District Label.

Attribute labels can be combined with levels and shown as Level Label (Attribute Label) format. For example, the 'Store (Fmt)' shown in [Figure 7-15](#). The attribute label hovers above the layer. However, hovering on first layer, would just display the dimension label.

**Merge/Split** You can choose to display multiple attributes as a single layer by using the merge option in the right-click context menu. Once you have merged two attributes together, you can split them using the split option in the context menu option.

---

**Note:** The Merge/Split feature is only available in the outline view, not the block view.

---

To merge two attributes, perform the following:

1. Right-click one of the attributes you want to merge.
2. In the context menu that appears, select **Merge** and then select the other attribute from within the Merge menu. See [Figure 7-16](#) for an example.

**Figure 7-16 Merging Attributes**

			12/19/2009	12/26/2009	12/12/2009
[-] 1 RETAIL CORP.			0 0	0.0	0.0
[-] 51 SOUTHERN EUROPE			0.0	0.0	0.0
[-] 33 FRANCE	7		0.0	0.0	0.0
0102 STRASBOURG		MALL	0.0	0.0	0.0
0296 BORDEAUX		MALL	0.0	0.0	0.0
0557 TOULOUSE				0.0	0.0
0593 NICE				0.0	0.0
0711 MARSEILLES				0.0	0.0
0804 LYON				0.0	0.0
0959 PARIS				0.0	0.0
[-] 34 SPAIN	3			0.0	0.0
0594 BARCELONA					
1000 BARCELONA					

Hide Position(s)

Expand Level(s)

Collapse Level(s)

---

Hide Attribute(s)

Merge ▶

Store (Fmt)

The attributes merge together and appear in the same row or column. Note how the Store Count and Store Format attributes are now in the same column in [Figure 7-17](#).

**Figure 7-17 Merged Attributes**

		12/19/2009
[-] 1 RETAIL CORP.		0.0
[-] 51 SOUTHERN EUROPE		0.0
[-] 33 FRANCE	7	0.0
0102 STRASBOURG	MALL	0.0
0296 BORDEAUX	MALL	0.0
0557 TOULOUSE	SUBURB	0.0
0593 NICE	MALL	0.0
0711 MARSEILLES	CITY	0.0
0804 LYON	MALL	0.0

Only attributes belonging to different levels can be merged. You cannot perform Merge/Split actions on the first layer in the outline view because this layer displays the first attribute across levels merged.

To split two attributes that have been merged, perform the following:

1. Right-click a merged row or column.
2. In the context menu, select **Split**, and then select one of the merged attributes from within the Split menu.

**Figure 7-18 Splitting Attributes**

		12/19/2009	12/26/2009	12/12/2009	1/9/2010
[-] 1 RETAIL CORP.		0.0	0.0	0.0	0.0
[-] 51 SOUTHERN EUROPE		0.0	0.0	0.0	0.0
[-] 33 FRANCE	7			0.0	0.0
0102 STRASBOURG	MALL			0.0	0.0
0296 BORDEAUX	MALL			0.0	0.0
0557 TOULOUSE	SUBL			0.0	0.0
0593 NICE	MALL			0.0	0.0
0711 MARSEILLES	CITY			0.0	0.0
0804 LYON	MALL			0.0	0.0
0959 PARIS	MALL			0.0	0.0
[-] 34 SPAIN	3				

Hide Position(s)

Expand Level(s)

Collapse Level(s)

---

Hide Attribute(s)

Split ▶

Store (Fmt)

District (Str Cnt)

In the outline view, you can merge or split attributes across levels using the right-click context menu. However, the first layer would always display attributes with display order one merged across levels. In addition, you cannot merge attributes that belong to the same level.

---

**Note:** The merge/split feature is session-only and is lost once you close the session.

---

### Block View

In block view, each layer renders one attribute, and all displayed attributes of a level are shown consecutively in user chosen display order as shown in Figure 7-19. The first layer in each dimension features the expand/collapse (+/-) icons.

Figure 7-19 Block View: Attributes in Row Edge

		Str Cnt	Str Fmt	12/19/2009
[-] 53 EASTERN EUROPE	[-] 70 RUSSIA	1	0559 MOSKOW MALL	0.0
[-] 55 BENELUX	[-] 32 BELGIUM	1	0558 BRUSSELS CITY	0.0
	[-] 30 LUXEMBOURG	1	0199 LUXEMBOURG SUBURB	0.0
	[-] 31 NETHERLANDS	1	0556 AMSTERDAM MALL	0.0
[-] 59 NORTHERN EUROPE	[-] 38 FINLAND	1	0231 HELSINKI CITY	0.0
	[-] 47 NORWAY	1	0190 OSLO SUBURB	0.0
[-] 52 CENTRAL EUROPE	[-] 49 GERMANY	1	0144 FRANKFURT MALL	0.0
[-] 54 UNITED KINGDOM	[-] 44 ENGLAND	4	0242 BIRMINGHAM CITY	0.0
			0156 LIVERPOOL SUBURB	0.0
			0160 MANCHESTER MALL	0.0
			0297 LONDON CITY	0.0

Figure 7-20 Block View: Attributes in Column Edge

				[-] 55 BENELUX	
				[-] 32 BELGIUM	[-] 30 LUXEMBOURG
				District (Str Cnt)	1
				0558 BRUSSELS	0199 LUXEMBOURG
				CITY	SUBURB
[-] FY2009	[-] 4th Qtr, FY2009	[-] Dec, FY2009	12/19/2009	0.0	0.0
			12/26/2009	0.0	0.0
			12/12/2009	0.0	0.0
			1/9/2010	0.0	0.0
			1/2/2010	0.0	0.0

In block view, the attribute ordering would always follow the User chosen display order. The User would be allowed to perform reordering using drag-drop, but that would be equivalent to User navigating to View Attributes and Sort tab and changing the attribute display order.

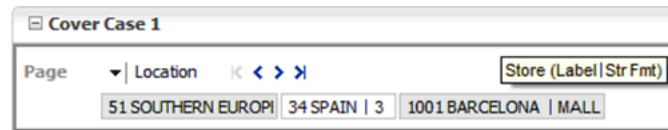
You can also right-click an attribute and hide in block view. This completely removes the associated layer from view.

As in outline view, the expand/collapse (+/-) icons would be on first layer for each dimension and User could choose to display Label attribute it in any order, or even hide it altogether (as long as there is at least one attribute displayed for each level).

## Page Edge

You can also see the attributes of a dimension that is in the page edge. The attributes are displayed on page edge and are separated by a bar separator as shown. The attribute labels would be added to the level display on hover as shown.

**Figure 7-21 Attributes on the Page Edge**



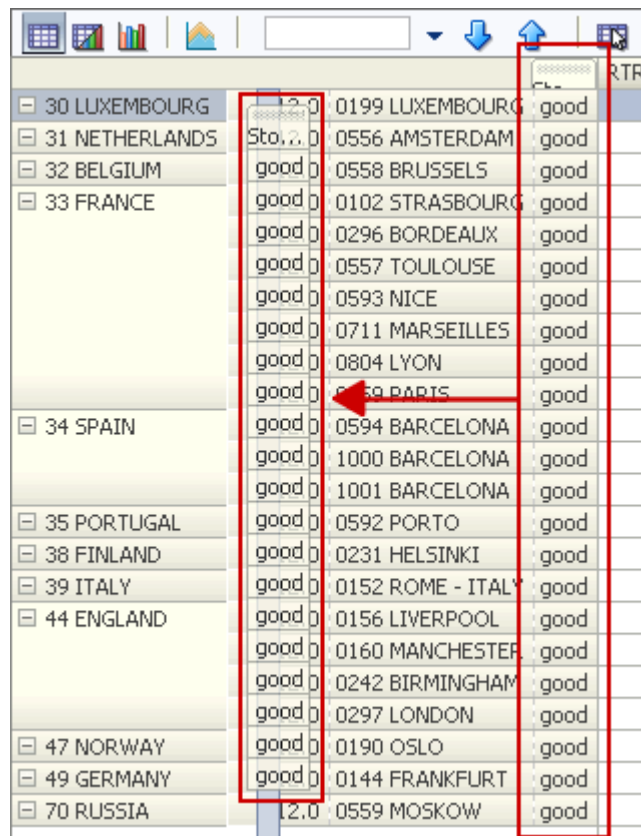
**Reordering Attributes** In both the outline and block views, you can reorder attributes across levels by dragging an attribute row or column to a different location.

**Note:** The reordering feature is persisted in the session only. Once you close the session, the new order is lost.

To change the order of attributes, perform the following:

1. Roll over the area above the row until the attribute label appears.
2. Click and drag the attribute label. As you move the attribute row or column, available locations where you can drop the attribute are shaded gray.

**Figure 7-22 Reordering Attributes**



- When the location where you would like to move the attribute is shaded gray, drop the attribute.

**Figure 7–23 Reordered Attributes**

					RTR:
30 LUXEMBOURG	good	12.0	0199 LUXEMBOURG		
31 NETHERLANDS	good	12.0	0556 AMSTERDAM		
32 BELGIUM	good	12.0	0558 BRUSSELS		
33 FRANCE	good	12.0	0102 STRASBOURG		
	good	12.0	0296 BORDEAUX		

**Hiding Attributes** You can hide an attribute in a view by right-clicking a cell within that attribute’s row or column. In the context menu, select **Hide Selected Attribute(s)**.

---

**Note:** The hiding feature is session-only and is lost once you close the session.

---

**Figure 7–24 Hiding Attributes**

					RTR:xx
30 LUXEMBOURG	good	12.0	0199 LUXEMBOURG	12.0	
31 NETHERLANDS	good	12.0	0556 AMSTERDAM	12.0	
32 BELGIUM	good	12.0	0558 BRUSSELS		
33 FRANCE	good	12.0	0102 STRASBOURG		
	good	12.0	0296 BORDEAUX		

## Attribute Based Sort

You can sort positions in a level using any of the level's attributes. The View Attributes and Sort tab enables you to choose attributes used for sorting. There you can also define sort direction (ascending/descending) and the order that the chosen attributes are to be applied during the sorting process. For example, the SKUs in the product dimension can be sorted primarily by price, and then within those prices by label.

The sort is applied dimensionally across multiple levels. For example, if the product dimension has the levels company, division, class, style-color, and SKU, the positions within the company level are sorted first based on selected sort attributes for company, and then positions within each division applying the division's selected sort attributes, and so on.

As with display, if an attribute is defaulted as sort attribute for a level, the default sort is always applied if you have no other selection. The attribute-based sort order does not over-ride any current simple sort selection, unless you:

- Navigate to the View Attributes and Sort tab and click **OK** or **Apply**. This reapplies the attribute-based sort even if you do not make any changes on this tab.
- Select **Undo Sort** in the right-click context menu.

For measure dimensions, the User defined Sort Order is applied by default. You can choose the **Disable User defined Sort Order** option on the Show/Hide tab to disable the default behavior.

## Find

The find feature enables you to search for words, partial words, or phrases within the rows, column, and page axis of an active view. The search does not include the data within the view.

The find feature locates the phrase you searched for and shades it gray. If the matched position is not visible because it's hidden under a scroll bar, the view is automatically scrolled to reveal it. The search is performed through collapsed or hidden positions. When a matched position is found, the parent is expanded and the matched position is shaded gray.

The find feature can be accessible four ways:

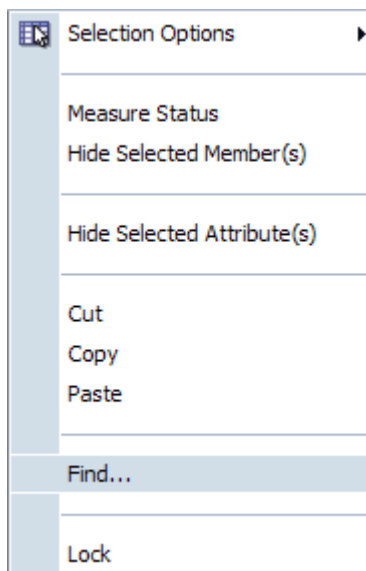
- The **Find** option in the right-click context menu
- The **Find** option in the Edit menu
- The shortcut **Ctrl + F**
- The **Find** field in the view toolbar

### Find from the Right-click Context Menu

To use the find feature from the right-click context menu, perform the following:

1. Right-click a measure, position, or attribute label to see the right-click context menu. Note that right-clicking on a data cell does not activate the find feature in the right-click context menu.
2. Click **Find**.

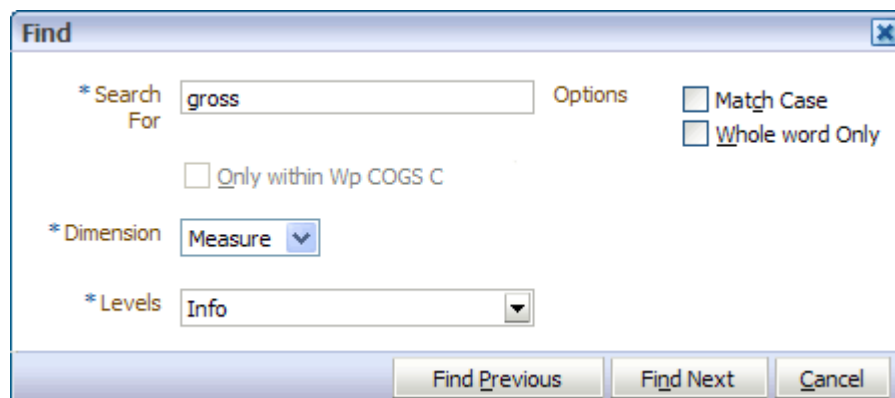
**Figure 7–25 Find in the Right-click Context Menu**





3. The Find window appears.

**Figure 7–26 Find Window**



Enter the following:

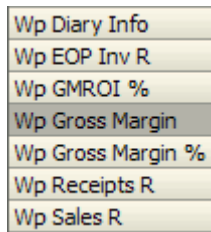
- **Search For:** Enter the phrase you want to find.
- **Match Case:** Select this option if you want the search to locate phrases that use the same case as the phrase you entered. Leave it unchecked if you want the search to find all phrases that match yours, regardless of case.
- **Whole word Only:** Select this option if you want the search to find your phrase in a whole word rather than a partial one.

For instance, if you were searching for the letter **U** and you selected the **Whole word Only** option, then the search would find the **Wp BOS U** measure, but it would not find the letter **U** within the **Wp BOS AUR** measure.

- **Only within...:** This option enables you to search in a variety of ways:
  - Search for your phrase only within one or more measures, positions, or attributes that you right-clicked in Step 1. When this option is selected, the search ignores all matches outside of those measures, positions, or attributes.
  - Search within multiple positions by selecting more than one member to search through.
  - Find a phrase within a specific member and within its own dimension.
  - Find a phrase within a specific member and within another dimension.
  - In outline mode, use this option to find positions within different levels (style, SKU).
  - In block mode, use this option to find positions within the same level (either style or SKU).
- **Dimension:** Specify what dimension you want to search within. This is a required step.
- **Levels:** Specify which level of the dimension you want to search within. You can choose a specific level or you can choose **All** to search all levels. The search is performed level by level, not through parent and child. For example, when there are two levels, style and SKU, the search is performed in the style level first and then the SKU.

- When finished, click **Find Next**. The view refreshes. If a match is found, it is shaded gray.

**Figure 7–27 Match Shaded Gray by Find Feature**

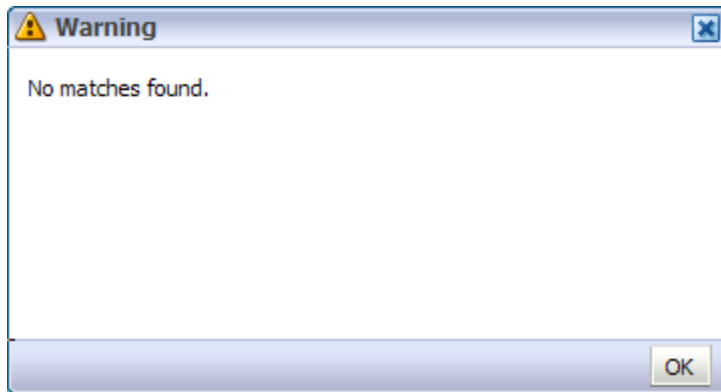


Wp Diary Info
Wp EOP Inv R
Wp GMROI %
Wp Gross Margin
Wp Gross Margin %
Wp Receipts R
Wp Sales R

- Click **Find Next** to see the next match. You can click **Find Previous** at any time to see matches you have already seen.

If a match is not found, the following message appears:

**Figure 7–28 No Matches Found Message**



---

**Note:** A similar message appears when you reach the end of the search and asks if you would like to start the search again.

---

## Find from Edit Menu or Ctrl + F

Using the **Find** feature from the Edit menu or **Ctrl + F** works similarly to the right-click context menu.

1. Once you have opened a workbook, click **Find** in the Edit menu or enter **Ctrl + F**. It is not necessary to select anything in the view.
2. The Find window appears. Enter the information as described in Step 2 of the [Find from the Right-click Context Menu](#) section.

---

**Note:** If no position was selected in the workbook, the Dimension field will not have a dimension automatically selected. You must select a dimension from the list to perform the search.

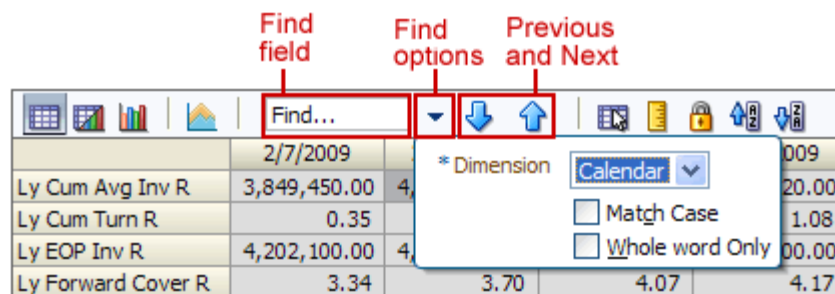
---

3. When finished, click **Find Next**. The view refreshes behind the Find window.

## Find from the View Toolbar

The Find field within the View toolbar is a quick alternative to using the Edit or Context menus.

**Figure 7–29 Find Field in the View Toolbar**



To use the find option in the workbook toolbar, perform the following:

1. Enter a phrase in the **Find** field.
2. Click the **Find Options** arrow to manage the search parameters. This is an optional step. If you skip this step, the search is performed on all dimensions.
  - **Dimension:** Select the dimension you want to search in or select **All** to search all dimensions.
  - **Match Case:** Check this option if you want the matches to have the same case that you entered.
  - **Whole word Only:** Check this option if you want to find your phrase in a whole word rather than a partial one.
3. Click either the **Previous** or **Next** arrows to begin your search.



## Images

The ability to view images associated with positions on a non-calendar dimension is useful in many aspects of the retail world such as assortment planning, item planning, story boarding, and so on.

For instance, you can associate an item with a image of what it should look like displayed on the shelf. You can associate stores with images of the store front or interior. You can use images to storyboard themes by creating a collection of looks and colors for a particular buying period, floor set, or flow. Some retailers choose to associate multiple types images with multiple levels of the Product dimension. For instance, you could associate images for the following Product levels:

- **Department:** image of a generic sweater
- **Class:** image of a wool sweater
- **Subclass:** image of a L/S V-Neck Solid sweater
- **Style:** image of Chunky Shrunken Style, Washable Wool, L/S V-Neck Solid sweater
- **Style/Color:** image of Chunky Shrunken Style, Color Pumpkin, Washable Wool, L/S V-Neck Solid sweater

The Fusion Client gives you the ability to associate an image for any dimension other than Calendar. These images can be stored on a website or in a repository located in the same network as the application server.

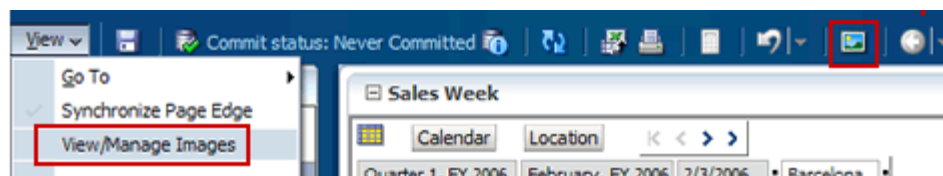
Once images are associated with a position, you can view and compare them within the Fusion Client.

### Associating Images with a Position

To associate an image with a position, perform the following steps:

1. Click the **View/Manage Images** icon in the toolbar or select **View/Mange Images** from the View menu.

*Figure 8–1 View/Manage Images Option and Icon*



2. The View Manage Images dialog box appears. Enter the following information:
  - **Dimension and Level:** Select the dimension and level into which you want to load the image. In [Figure 8-2](#), the Product dimension and Item level were chosen.
  - **Find image for:** Select the position for which you want to load the image. You can select the position from the drop-down list or you can scroll through the positions in the carousel view.
  - **Image Source:** Select either **URL** or **Repository** as the location of the image. Select **URL** if the image is located on the internet. Select **Repository** if the image has already been loaded into the repository on a shared network location.

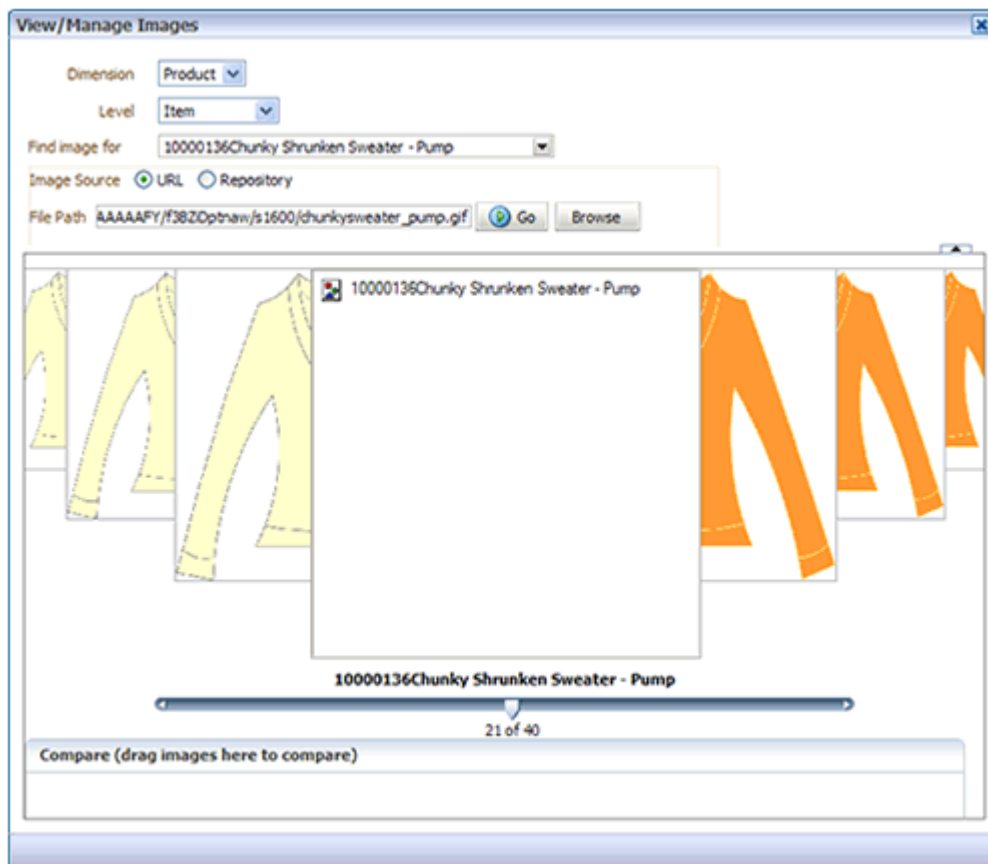
---

**Note:** The repository is configured during installation process. Contact your administrator for assistance. See the *RPAS Installation Guide for the Fusion Client* for more information.

---

3. **File path:** Enter the file path for the image. You can type or paste the file path for either a Repository or URL image source. For Repository images, you can also use the **Browse** button to locate the file within the repository. Once you have entered the file path, click **Go**.

**Figure 8-2 Loading Images**



The image appears in the image carousel and is now associated with the position.

## Deleting Images

You can disassociate an image with a position by using the **Delete** button in the View/Manage Images dialog box.

---

**Note:** Using the **Delete** function does not delete an image from the repository. It only disassociates the image with the position.

---

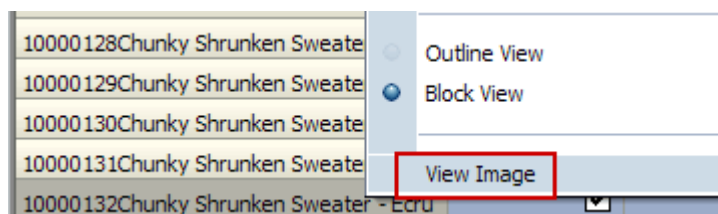
To delete an image, perform the following steps:

1. Click the **View/Manage Images** icon in the toolbar or select **View/Manage Images** from the View menu.

Or

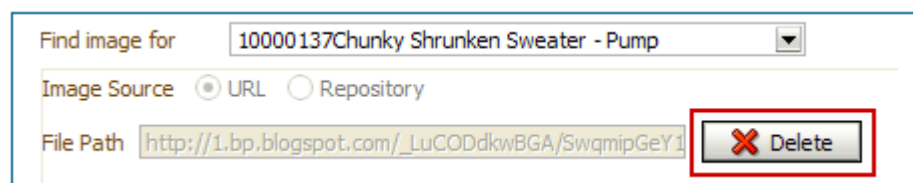
Right-click the position within the view and select **View Image** from the right-click context menu.

**Figure 8–3 View Image Option in the Right-Click Context Menu**



2. The View/Manage Images dialog box appears. Select the position for which you want to delete the image. You can select the position from the **Find image for** drop-down box or from the image carousel.
3. Once you have selected the position, click the **Delete** button located to the right of the **File Path** field.

**Figure 8–4 Delete Button**



The image disappears from the image carousel.

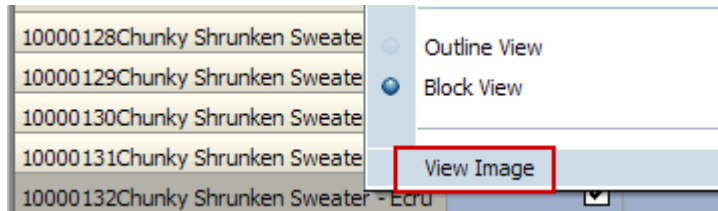
## Viewing Image from a View

To view the image associated with a position, use one of the following methods:

### Viewing Images - Method 1

1. Right-click the position within the view or page edge.
2. The right-click context menu appears. Select **View Image**.

*Figure 8-5 View Image Option in the Right-Click Context Menu*



3. The View/Manage Images dialog box appears. The image for the position you selected is shown in the center of the image carousel.

### Viewing Images - Method 2

1. Click the **View/Manage Images** icon in the toolbar or select **View/Manage Images** from the View menu.
2. The View/Manage Images dialog box appears. Use the **Find image for** drop-down box or the image carousel to locate and view the image.



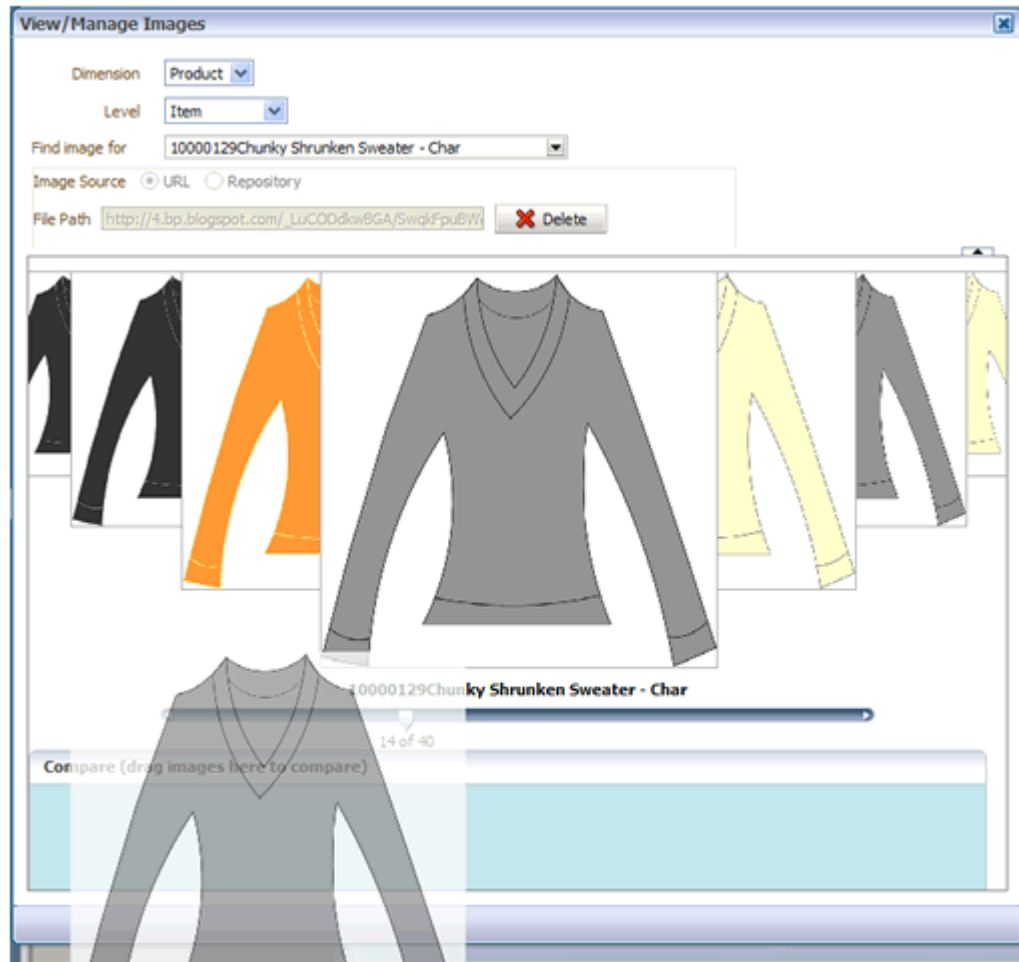
## Comparing Images

You can drag images from the images carousel to the Compare area of the View/Manage Images dialog box in order to compare images side by side.

To compare images, perform the following steps:

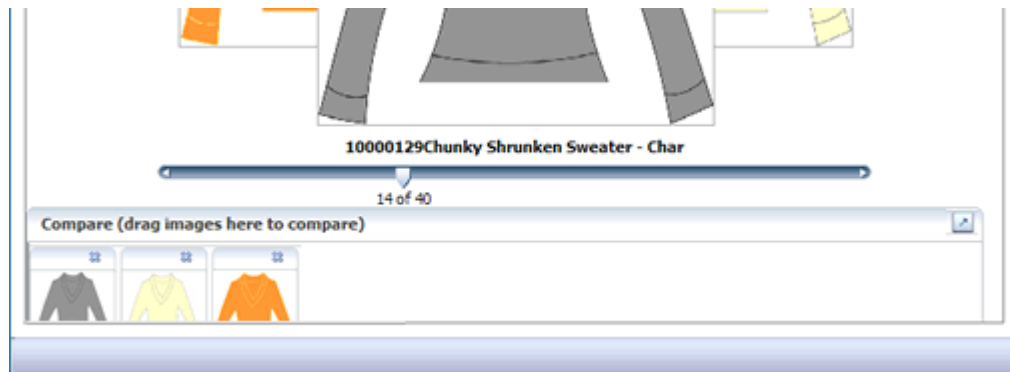
1. Click and drag an image from the image carousel to the Compare area. When the background of the Compare area changes to blue, release the image. The image appears in the Compare area.

**Figure 8–6** Dragging an Image to the Compare Area



2. Click and drag other images to the Compare area. The images appear as thumbnails.

**Figure 8-7 Images as Thumbnails in the Compare Area**



3. To expand the Compare area in order to view the selected items as larger images, click the **Expand** icon in the top, right corner of the Compare area. To collapse the Compare area once expanded, click the **Collapse** icon in the top, right corner.

---

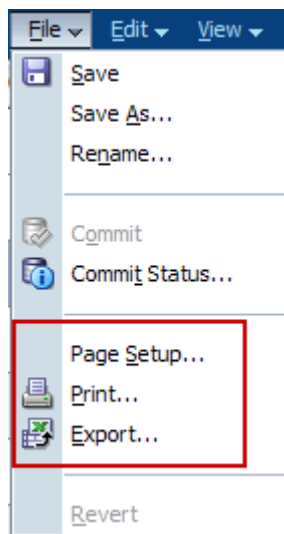
## Print and Export

Print and export functionality enables you to export data in the current slice of a view to Microsoft Excel or a delimited file and print it.

Additionally, you can adjust the page setup options before printing and exporting the data. These print settings are persisted in the Fusion Client for the selected view.

The page setup, print, and export options are located in the File menu.

**Figure 9–1** Page Setup, Print, and Export Options



In addition, print and export icons are located in the toolbar.

**Figure 9–2** Print and Export Icons

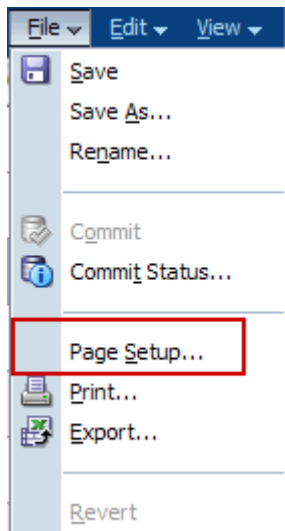


This chapter details the print, export, and page setup functionality.

## Page Setup

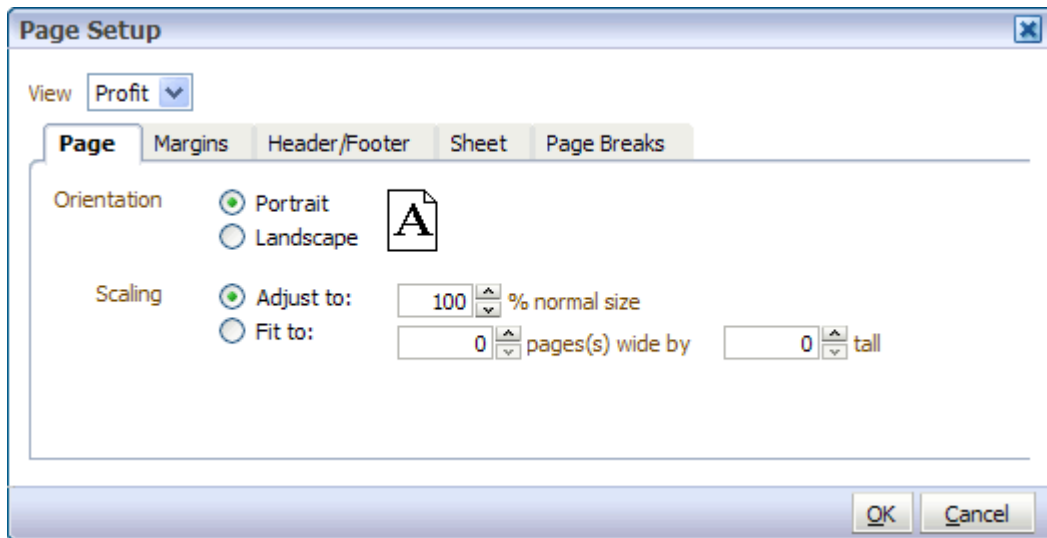
The page setup option is available in the File menu, as shown in [Figure 9–3](#).

**Figure 9–3 Page Setup Option in the File Menu**



The Page Setup dialog box ([Figure 9–4](#)) contains five tabs: Page, Margins, Header/Footer, Sheet, and Page Breaks.

**Figure 9–4 Page Setup Dialog Box**



Page settings are applied per view. The View drop-down list contains a list of views of the current workbook. By default, the displayed view is selected. Selecting the view in the View drop-down sets the view in all tabs of this dialog box.

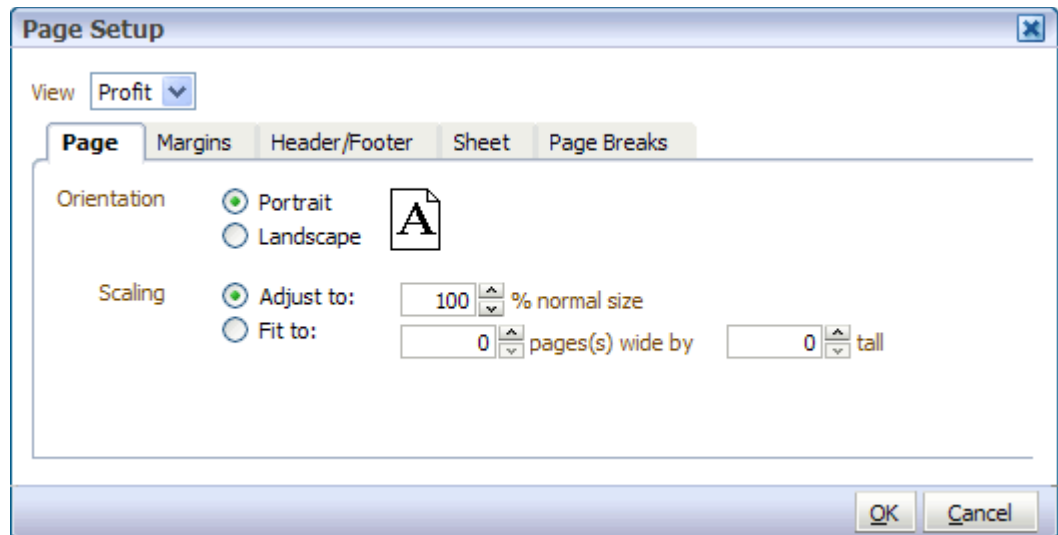
The settings created in the Page Setup dialog box are passed to Microsoft Excel and used when printing the data.

The five Page Setup tabs are described in the next sections.

## Page Tab

Use the Page tab to specify the page orientation and scaling.

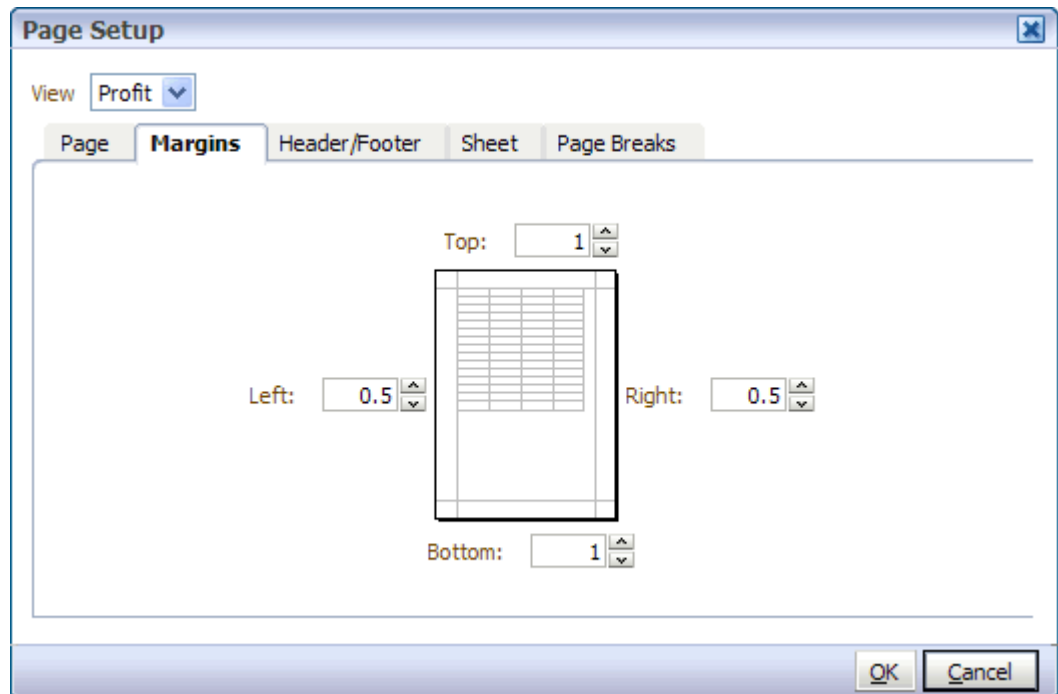
**Figure 9–5** Page Setup Dialog Box: Page Tab



## Margin Tab

Use the Margin tab to specify the page margins.

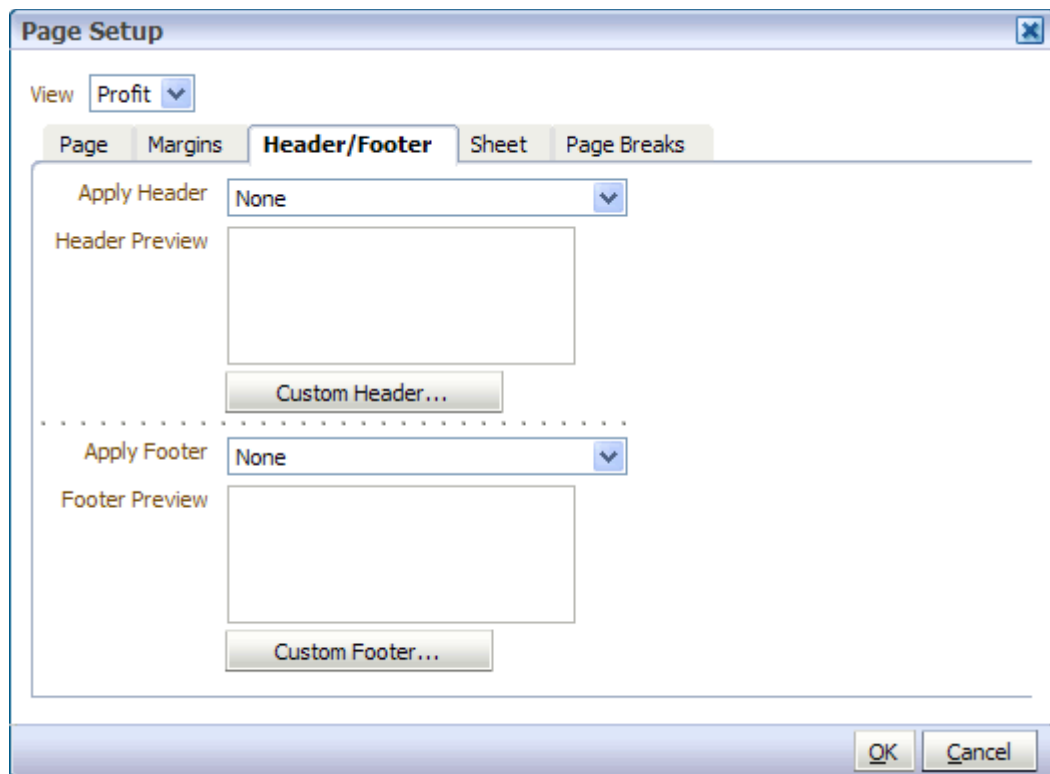
**Figure 9–6** Page Setup Dialog Box: Margin Tab



## Header/Footer

Use the Header/Footer tab to apply headers and footers.

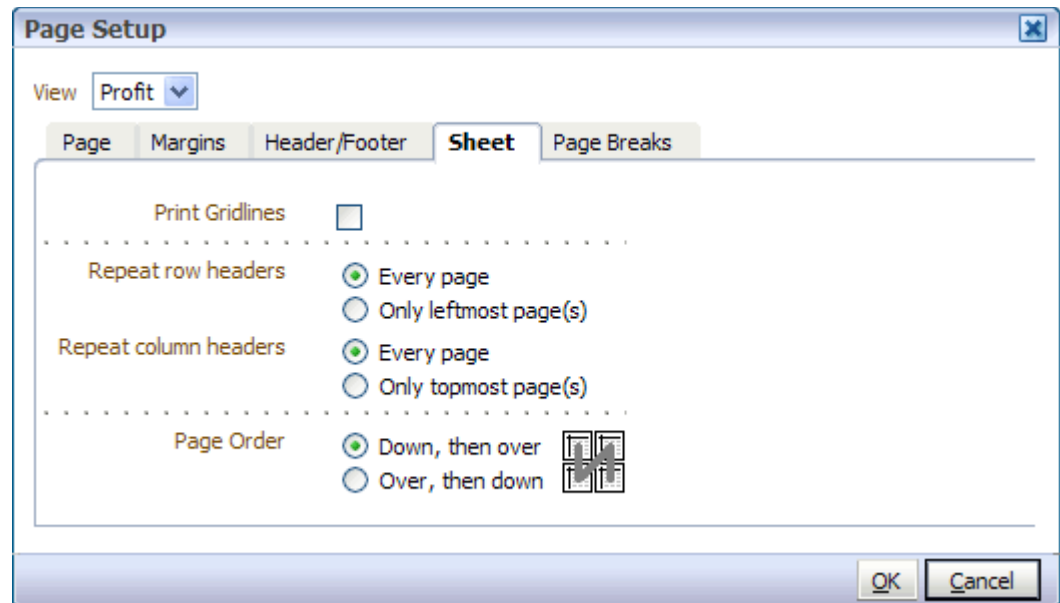
**Figure 9–7** Page Setup Dialog Box: Header/Footer Tab



## Sheet

Use the Sheet tab to define row and column headers, print gridlines, and page order.

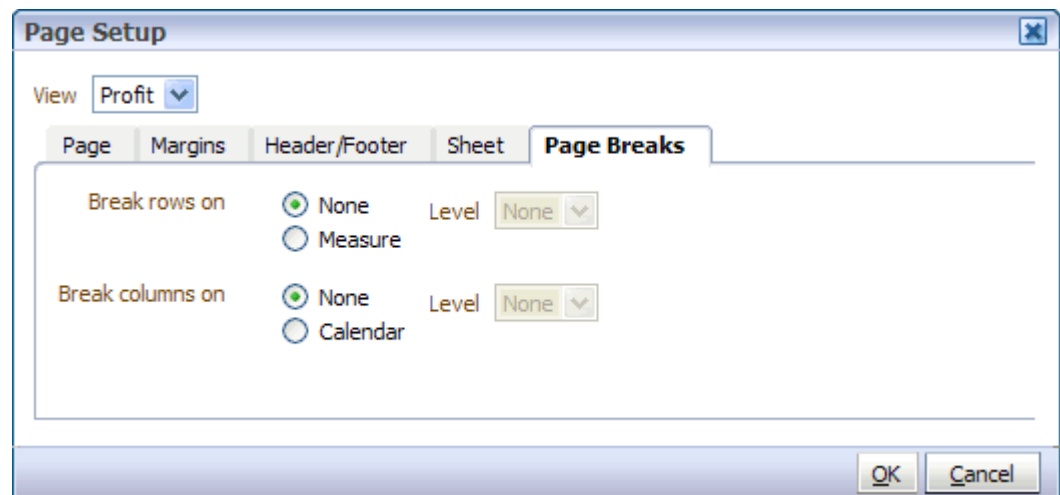
**Figure 9–8** Page Setup Dialog Box: Sheet Tab



## Page Breaks

Use the Page Breaks tab to specify how the rows and columns break across pages.

**Figure 9–9** Page Setup Dialog Box: Page Breaks Tab



Once you have used the Page Setup dialog box to define how the view appears on a page, you can print or export the page.

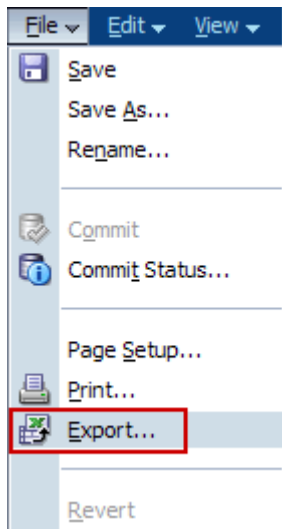
## Export

You can use the Export functionality to export a slice to a text file or to Microsoft Excel. These options are described in the following sections.

### Export to a Text File

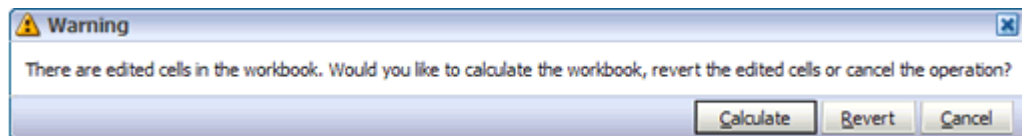
1. Select the **Export** option from the File menu.

**Figure 9–10** Export Option



If you have edited the view, a warning message appears, asking if you would calculate the workbook, revert the cells, or cancel the export.

**Figure 9–11** Edited Cells Warning Message

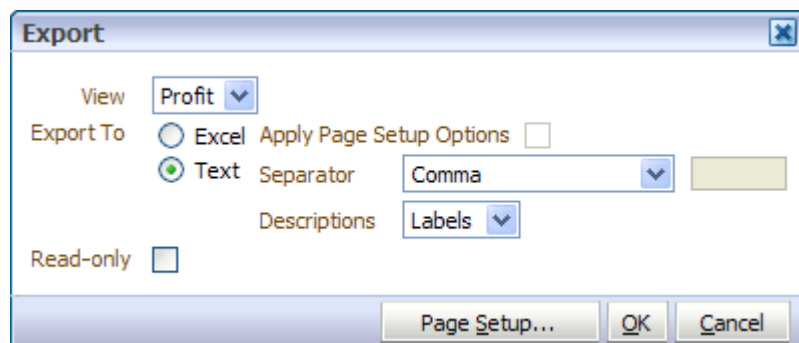


- Clicking **Calculate** calculates the workbook and opens the File Download dialog box.
- Clicking **Revert** reverts the edited cells and opens the File Download dialog box.
- Clicking **Cancel** cancels the operation.



2. The Export dialog box appears.

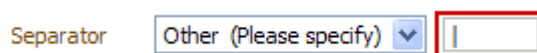
**Figure 9–12 Export Dialog Box: Text**



Select the following options:

- **View:** Choose the view that you want to export.
- **Export To:** Select **Text**.
- **Separator:** Choose **Comma**, **Tab**, **Space**, or **Other (Please specify)**. The default separator is **Comma**.
  - If you choose **Other (Please Specify)**, you must enter a character in the text box. This character will act as the separator.

**Figure 9–13 Separator: Others Option**



- **Descriptions:** Choose either **Labels** or **Names** to be displayed as a header in the exported data. The default is Labels.

---

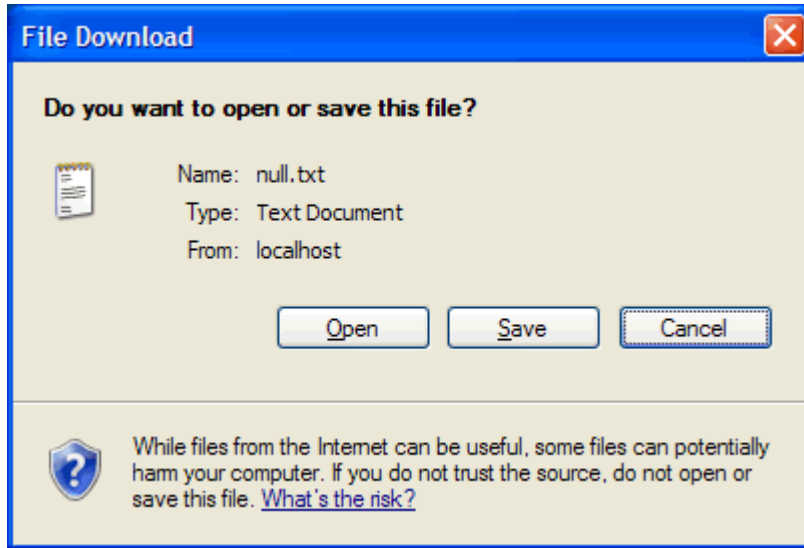
**Note:** The **Apply Page Setup Options** and **Read-only** options are not applicable to text file exports.

---

3. Click **Page Setup...** to make adjustments to the page setup. This step is optional. For more information, see [Page Setup](#).
4. Click **OK**.

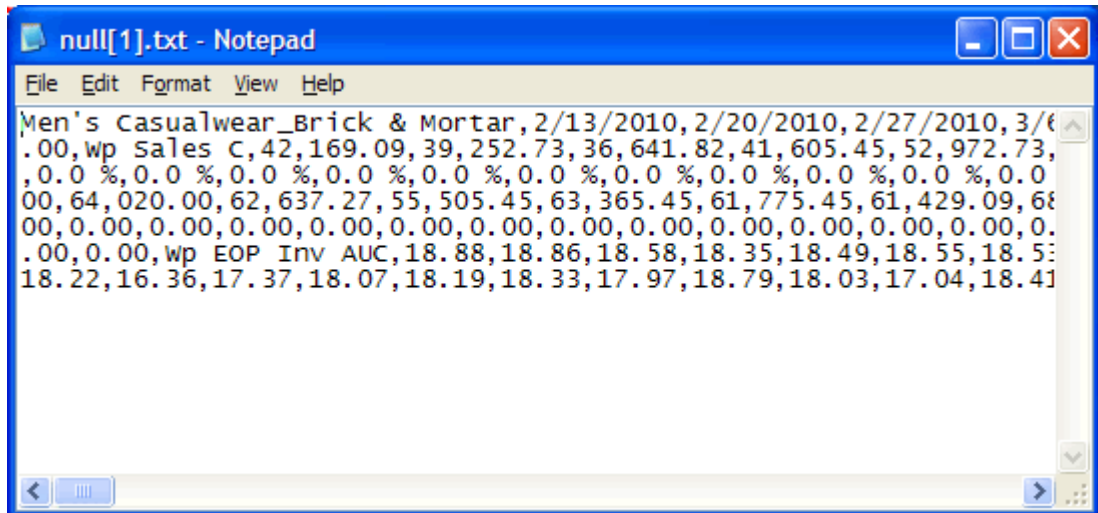
5. The File Download dialog box appears. You can choose to either **Open** the text file or **Save** it to a location on your computer.

**Figure 9–14 File Download Dialog Box**



6. If you chose **Open**, the text file opens. If you chose **Save**, you can open the file from the location you saved it.

**Figure 9–15 Data in Text File**



## Export to Excel

You can export data to Microsoft Excel through two options. You can use the **Export** option in the File menu to set export options before exporting. Or, you can use the **Export** icon in the toolbar to bypass the export options and export the slice directly to Excel.

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**Note:** The export functionality is certified with Microsoft Excel 2003.

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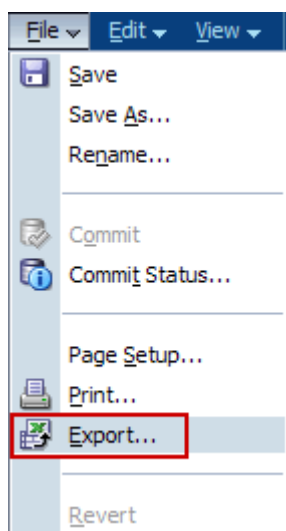
---

### Option 1: Export Option in the File Menu

To export the slice to Microsoft Excel with the **Export** option in the File menu, perform the following steps:

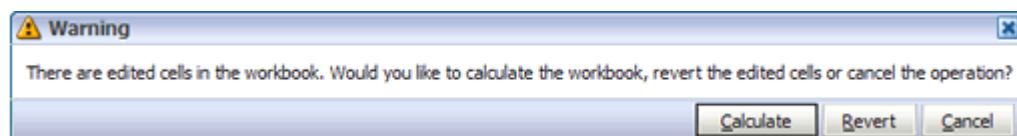
1. Select the view that you want to export.
2. Select the **Export** option from the File menu.

**Figure 9–16** Export Option



If you have edited the view, a warning message appears, asking if you would calculate the workbook, revert the cells, or cancel the operation.

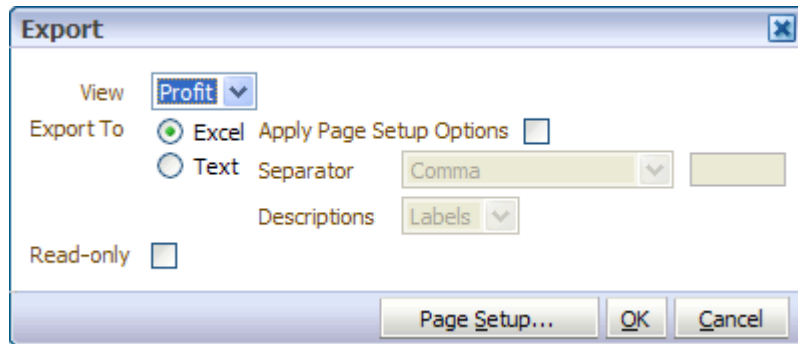
**Figure 9–17** Edited Cells Warning



- Clicking **Calculate** calculates the workbook and opens the File Download dialog box.
- Clicking **Revert** reverts the edited cells and opens the File Download dialog box.
- Clicking **Cancel** cancels the operation.

3. The Export dialog box appears.

**Figure 9–18 Export Dialog Box: Excel**



Select the following options:

- **View:** choose the view that you want to export.
- **Export To:** select **Excel**.
- **Apply Page Setup Options:** select this check box if you want to apply page setup options before exporting the data so that you can print the data from the exported Excel file.
- **Read-only:** select this check box if you want the exported data to be read-only. This prevents the data from being updated when opened in Microsoft Excel.

---

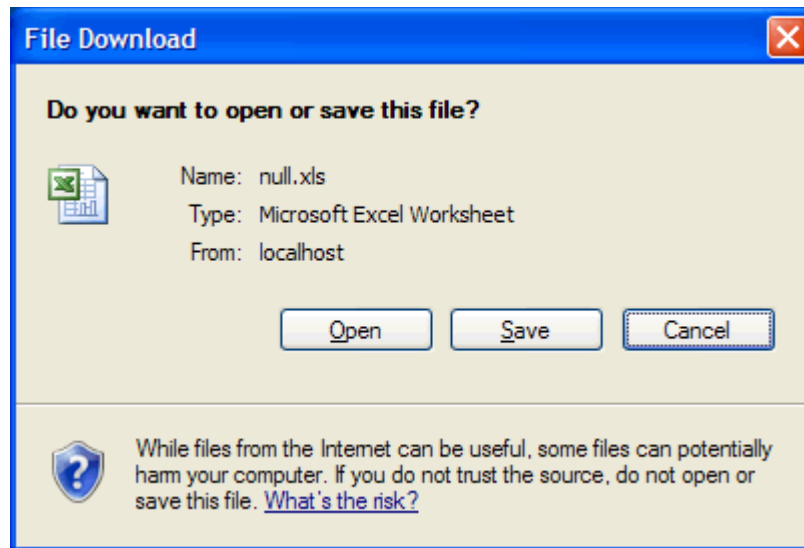
---

**Note:** The **Separator** and **Descriptions** options are not applicable to Microsoft Excel exports.

---

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4. Click **Page Setup...** if you want to make adjustments to the page setup. This step is optional. For more information, see [Page Setup](#).
5. Click **OK**.
6. The File Download dialog box appears. You can choose to either **Open** the Microsoft Excel file or **Save** it to a location on your computer.

**Figure 9–19** *Export Dialog Box*

- If you chose **Open**, Microsoft Excel opens and the slice appears in a spreadsheet. If you chose **Save**, you can open the file from the location you saved it.

**Figure 9–20** Slice in Microsoft Excel

The screenshot shows a Microsoft Excel spreadsheet titled 'Microsoft Excel - null[2].xls'. The active sheet is 'Men's Casualwear\_Brick & Mortar'. The data is organized in a table with columns A through F and rows 1 through 21. Row 1 is a header row. Rows 2-20 contain numerical and percentage data for various metrics across different dates. Row 21 is empty. The status bar at the bottom shows 'Ready' and 'NUM'.

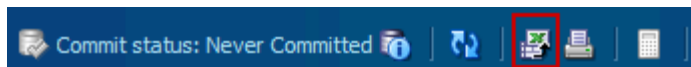
	A	B	C	D	E	F
1	Men's Casualwear	Brick & Mortar				
2		2/13/2010	2/20/2010	2/27/2010	3/6/2010	3/13/2010
3	Wp Sales R	46,386.00	43,178.00	40,306.00	45,766.00	58,270.00
4	Wp Sales C	42,169.09	39,252.73	36,641.82	41,605.45	52,972.00
5	Wp Gross Profit	0.00	10.00	0.00	10.00	10.00
6	Wp Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
7	Wp GPROI	0.00	-0.00	0.00	-0.00	-0.00
8	Ly Sales R	69,579.00	64,767.00	60,459.00	68,649.00	87,405.00
9	Ly Sales C	63,253.64	58,879.09	54,962.73	62,408.18	79,459.00
10	Ly Gross Profit	0.00	0.00	0.00	0.00	0.00
11	Ly Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
12	Ly GPROI	0.00	0.00	0.00	0.00	0.00
13	Wp Sales U	2,336	2,162	2,168	2,314	2,700
14	Wp Sales AUR	19.86	19.97	18.59	19.78	21.00
15	Wp Sales AUC	18.05	18.16	16.90	17.98	19.00
16	Wp EOP Inv AUC	18.88	18.86	18.58	18.35	18.00
17	Ly Sales U	3,504	3,243	3,252	3,471	4,100
18	Ly Sales AUR	19.86	19.97	18.59	19.78	21.00
19	Ly Sales AUC	18.05	18.16	16.90	17.98	19.00
20	Ly EOP Inv AUC	18.88	18.86	18.58	18.35	18.00
21						

## Option 2: Export Icon in the Toolbar

To export the slice to Microsoft Excel with the Export icon in the toolbar, perform the following steps:

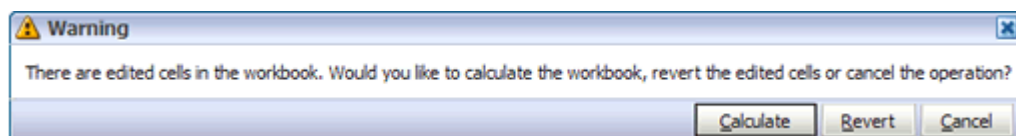
1. Select the view that you want to export.
2. Click the **Export** icon in the toolbar.

**Figure 9–21 Export Icon**



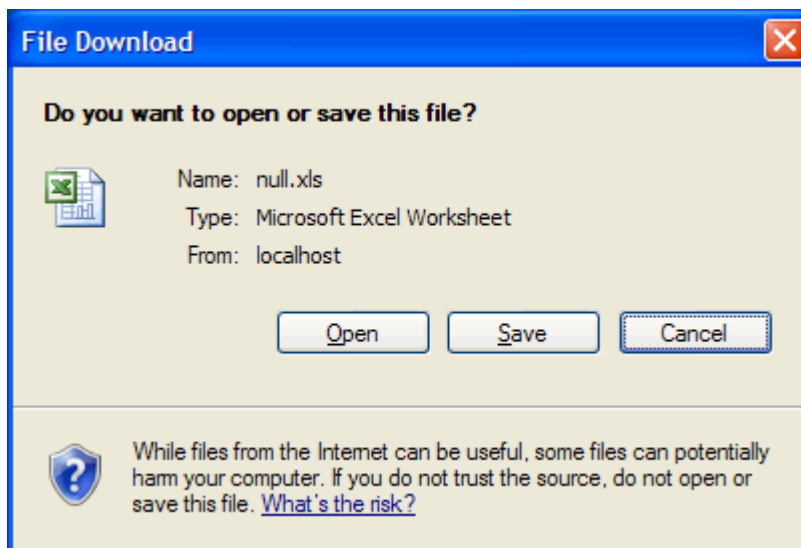
If you have edited the view, a warning message appears, asking if you would calculate the workbook, revert the cells, or cancel the operation.

**Figure 9–22 Edited Cells Warning**



- Clicking **Calculate** calculates the workbook and opens the File Download dialog box.
  - Clicking **Revert** reverts the edited cells and opens the File Download dialog box.
  - Clicking **Cancel** cancels the operation.
3. The File Download dialog box appears. You can choose to either **Open** the Microsoft Excel file or **Save** it to a location on your computer.

**Figure 9–23 File Download Dialog Box**



- If you chose **Open**, Microsoft Excel opens and the slice appears in a spreadsheet. If you chose **Save**, you can open the file from the location you saved it.

**Figure 9–24** Slice in Microsoft Excel

The screenshot shows a Microsoft Excel window titled 'Microsoft Excel - null[2].xls'. The active sheet is 'Men's Casualwear\_Brick & Mortar'. The data is presented as a pivot table with the following structure:

	A	B	C	D	E	F
1	Men's Casualwear	Brick & Mortar				
2		2/13/2010	2/20/2010	2/27/2010	3/6/2010	3/13/2010
3	Wp Sales R	46,386.00	43,178.00	40,306.00	45,766.00	58,270.00
4	Wp Sales C	42,169.09	39,252.73	36,641.82	41,605.45	52,972.00
5	Wp Gross Profit	0.00	10.00	0.00	10.00	10.00
6	Wp Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
7	Wp GPROI	0.00	-0.00	0.00	-0.00	-0.00
8	Ly Sales R	69,579.00	64,767.00	60,459.00	68,649.00	87,405.00
9	Ly Sales C	63,253.64	58,879.09	54,962.73	62,408.18	79,459.00
10	Ly Gross Profit	0.00	0.00	0.00	0.00	0.00
11	Ly Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
12	Ly GPROI	0.00	0.00	0.00	0.00	0.00
13	Wp Sales U	2,336	2,162	2,168	2,314	2,700
14	Wp Sales AUR	19.86	19.97	18.59	19.78	21.00
15	Wp Sales AUC	18.05	18.16	16.90	17.98	19.00
16	Wp EOP Inv AUC	18.88	18.86	18.58	18.35	18.00
17	Ly Sales U	3,504	3,243	3,252	3,471	4,100
18	Ly Sales AUR	19.86	19.97	18.59	19.78	21.00
19	Ly Sales AUC	18.05	18.16	16.90	17.98	19.00
20	Ly EOP Inv AUC	18.88	18.86	18.58	18.35	18.00
21						



## Print

You can print data through two options. You can use the **Print** option in the File menu to set print options before printing. Or, you can use the **Print** icon in the toolbar to bypass the print options.

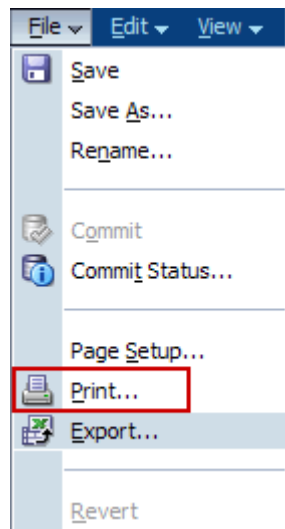
The print functionality is similar to the export functionality, except that the print functionality always applies the page setup options before exporting to Microsoft Excel. Print also differs from export because the exported data is always read-only.

### Option 1: Print Option in the File Menu

To print the slice with the **Print** option in the File menu, perform the following steps:

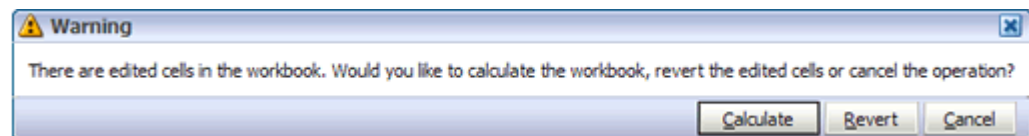
1. Select the view that you want to print.
2. Select the **Print** option from the File menu.

**Figure 9–25** *Print Option*



If you have edited the view, a warning message appears, asking if you would calculate the workbook, revert the cells, or cancel the operation.

**Figure 9–26** *Edited Cells Warning*



- Clicking **Calculate** calculates the workbook and opens the File Download dialog box.
- Clicking **Revert** reverts the edited cells and opens the File Download dialog box.
- Clicking **Cancel** cancels the operation.

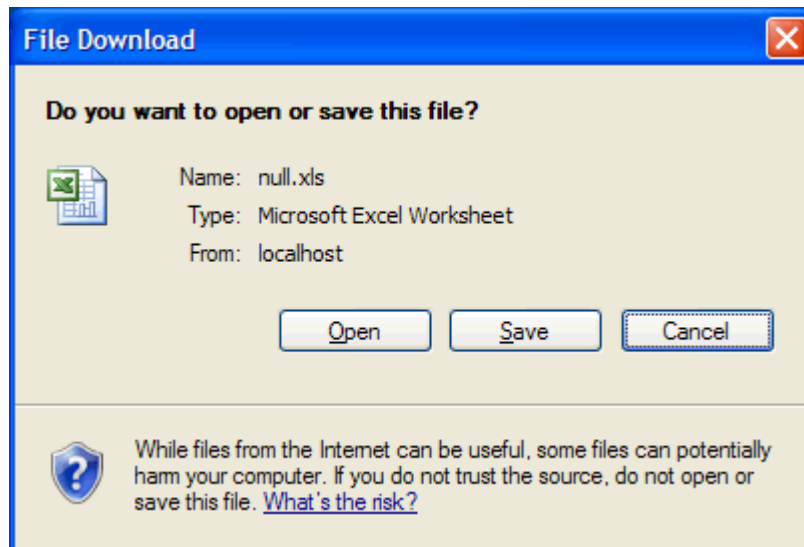
3. The Print dialog box appears. Select the view you want to print.

**Figure 9–27 Print Dialog Box**



4. Click **Page Setup...** if you want to make adjustments to the page setup. This step is optional. For more information, see [Page Setup](#).
5. Click **OK**.
6. The File Download dialog box appears. You can choose to either **Open** the Microsoft Excel file or **Save** it to a location on your computer.

**Figure 9–28 File Download Dialog Box**



7. If you chose **Open**, Microsoft Excel opens and the slice appears in a spreadsheet. If you chose **Save**, you can open the file from the location you saved it.

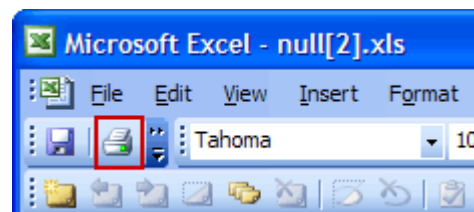
**Figure 9–29** *Slice in Microsoft Excel*

The screenshot shows a Microsoft Excel window titled 'Microsoft Excel - null[2].xls'. The menu bar includes File, Edit, View, Insert, Format, Tools, Data, RoboPDF, Window, and Help. The toolbar shows various icons, including a Print icon. The active cell is A1, containing the text 'Men's Casualwear\_Brick & Mortar'. The pivot table data is as follows:

	A	B	C	D	E	F
1	Men's Casualwear	Brick & Mortar				
2		2/13/2010	2/20/2010	2/27/2010	3/6/2010	3/13/2010
3	Wp Sales R	46,386.00	43,178.00	40,306.00	45,766.00	58,270.00
4	Wp Sales C	42,169.09	39,252.73	36,641.82	41,605.45	52,972.00
5	Wp Gross Profit	0.00	10.00	0.00	10.00	10.00
6	Wp Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
7	Wp GPROI	0.00	-0.00	0.00	-0.00	-0.00
8	Ly Sales R	69,579.00	64,767.00	60,459.00	68,649.00	87,405.00
9	Ly Sales C	63,253.64	58,879.09	54,962.73	62,408.18	79,459.00
10	Ly Gross Profit	0.00	0.00	0.00	0.00	0.00
11	Ly Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
12	Ly GPROI	0.00	0.00	0.00	0.00	0.00
13	Wp Sales U	2,336	2,162	2,168	2,314	2,714
14	Wp Sales AUR	19.86	19.97	18.59	19.78	21.14
15	Wp Sales AUC	18.05	18.16	16.90	17.98	19.14
16	Wp EOP Inv AUC	18.88	18.86	18.58	18.35	18.35
17	Ly Sales U	3,504	3,243	3,252	3,471	4,114
18	Ly Sales AUR	19.86	19.97	18.59	19.78	21.14
19	Ly Sales AUC	18.05	18.16	16.90	17.98	19.14
20	Ly EOP Inv AUC	18.88	18.86	18.58	18.35	18.35
21						

From Microsoft Excel, click the **Print** icon.

**Figure 9–30** *Print Icon in Microsoft Excel*

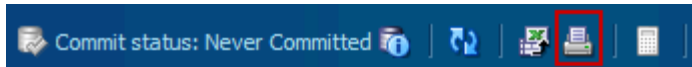


## Option 2: Print Icon in the Toolbar

To print the slice with the **Print** icon in the toolbar, perform the following steps:

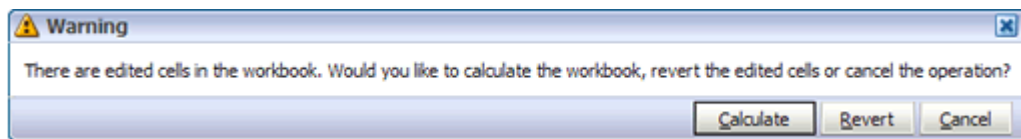
1. Select the view that you want to export.
2. Click the **Print** icon in the toolbar.

**Figure 9–31 Print Icon**



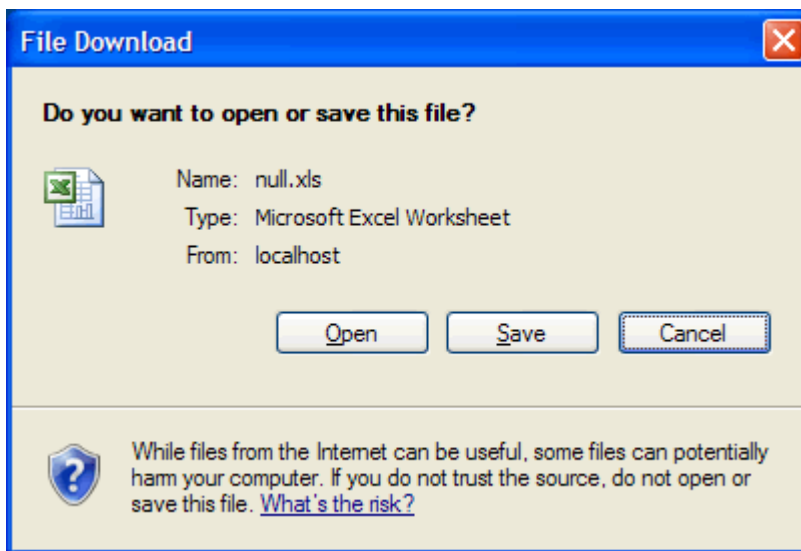
If you have edited the view, a warning message appears, asking if you would calculate the workbook, revert the cells, or cancel the operation.

**Figure 9–32 Edited Cells Warning**



- Clicking **Calculate** calculates the workbook and opens the File Download dialog box.
  - Clicking **Revert** reverts the edited cells and opens the File Download dialog box.
  - Clicking **Cancel** cancels the operation.
3. The File Download dialog box appears. You can choose to either **Open** the Microsoft Excel file or **Save** it to a location on your computer.

**Figure 9–33 Export Dialog Box**



- If you chose **Open**, Microsoft Excel opens and the slice appears in a spreadsheet. If you chose **Save**, you can open the file from the location you saved it.

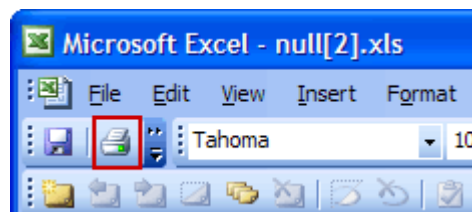
**Figure 9–34** *Slice in Microsoft Excel*

The screenshot shows a Microsoft Excel window with a pivot table. The pivot table is titled 'Men's Casualwear\_Brick & Mortar' and is located in the range A1:F20. The pivot table has a row label 'Men's Casualwear' and a column label 'Brick & Mortar'. The data is organized into a grid with columns for dates and rows for various sales and profit metrics.

	A	B	C	D	E	F
1	Men's Casualwear	Brick & Mortar				
2		2/13/2010	2/20/2010	2/27/2010	3/6/2010	3/13/2010
3	Wp Sales R	46,386.00	43,178.00	40,306.00	45,766.00	58,270.00
4	Wp Sales C	42,169.09	39,252.73	36,641.82	41,605.45	52,972.00
5	Wp Gross Profit	0.00	10.00	0.00	10.00	10.00
6	Wp Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
7	Wp GPROI	0.00	-0.00	0.00	-0.00	-0.00
8	Ly Sales R	69,579.00	64,767.00	60,459.00	68,649.00	87,405.00
9	Ly Sales C	63,253.64	58,879.09	54,962.73	62,408.18	79,459.00
10	Ly Gross Profit	0.00	0.00	0.00	0.00	0.00
11	Ly Gross Profit %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
12	Ly GPROI	0.00	0.00	0.00	0.00	0.00
13	Wp Sales U	2,336	2,162	2,168	2,314	2,714
14	Wp Sales AUR	19.86	19.97	18.59	19.78	21.14
15	Wp Sales AUC	18.05	18.16	16.90	17.98	19.14
16	Wp EOP Inv AUC	18.88	18.86	18.58	18.35	18.35
17	Ly Sales U	3,504	3,243	3,252	3,471	4,114
18	Ly Sales AUR	19.86	19.97	18.59	19.78	21.14
19	Ly Sales AUC	18.05	18.16	16.90	17.98	19.14
20	Ly EOP Inv AUC	18.88	18.86	18.58	18.35	18.35
21						

From Microsoft Excel, click the **Print** icon.

**Figure 9–35** *Print Icon in Microsoft Excel*





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## Special RPAS Fusion Client Features

This chapter describes special RPAS Fusion Client features that you can use. The following features are described:

- [Percent-of-Parent Measures](#)
- [Replicate Selections](#)

### Percent-of-Parent Measures

A percent-of-parent measure allows you to define, view, and edit a measure as a proportion or percentage of another measure for a parent that is up one or more levels. These measure relationships are also referred to as participation measures. These measures can be defined in the RPAS Fusion Client client in a view or preconfigured in the RPAS Configuration Tools. For more information about preconfigured measures, see the *RPAS Configuration Tools User Guide*.

A common use of this functionality is to define measures that are percentage participations of sales measures. Typically, these measures are defined as:

- **Absolute:** a percentage of a fixed level (such as class) so that the participation of each item to the class can be viewed and manipulated.
- **Relative:** a percentage to the next level shown in any dimension (such as Product).

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**Note:** Percent-of-parent measures can be defined only on measures that have Total as their default aggregate method.

---

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The following sections describe the absolute and relative percent-of-parent features.

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**Note:** For percent-of-parent contributions in instances with very small values (such as 0.000001) in the cell, those values are considered to be 0.0 when determining the percent-of-parent contribution.

---

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## Absolute

The absolute type of percent-of-parent measures allows you to explicitly define the parent levels that are used to calculate the percentage at all child levels.

As shown in [Figure 10-1](#), an absolute percent-of-parent measure has been created for Wp Sales R with a defined parent at the Half level of the Calendar dimension. Therefore, this measure shows what percentage of the Spring FY2010 half that each week is.

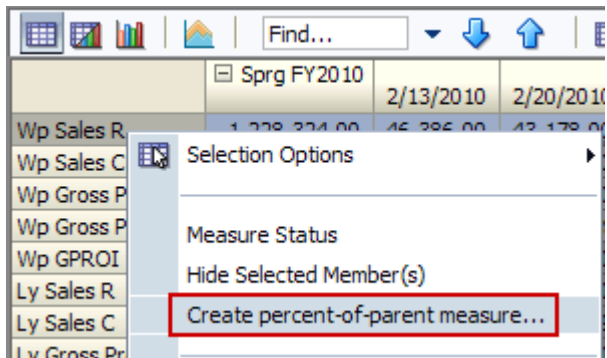
**Figure 10-1 Absolute Percent-of-Parent Measure**

	Sprg FY2010	2/13/2010	2/20/2010	2/27/2010	3/6/2010
Wp Sales R	1,228,324.00	46,386.00	43,178.00	40,306.00	45,766.00
Wp Sales R	% Half	4%	4%	3%	4%
Wp Sales C	1,116,658.18	42,169.09	39,252.73	36,841.82	41,603.45
Wp Gross Profit	0.00	0.00	0.00	0.00	0.00

To create an absolute percent-of-parent measure, perform the following steps:

1. Right-click the measure for which you want to create a percent-of-parent measure.
2. The right-click context menu appears. Select the **Create percent-of-parent measure...** as shown in [Figure 10-2](#).

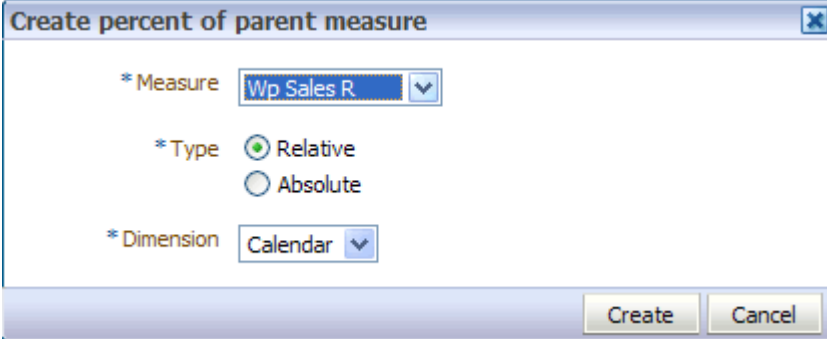
**Figure 10-2 Create Percent-of-Parent Measure Option**





3. The Create Percent-of-Measure dialog box appears (Figure 10-3). If you right-clicked a valid measure (one that has Total as its aggregation) in Step 1, then that measure appears in the **Measure** list. If not, then you must select a valid measure from the list.

**Figure 10-3 Create Percent-of-Parent Measure Dialog Box**



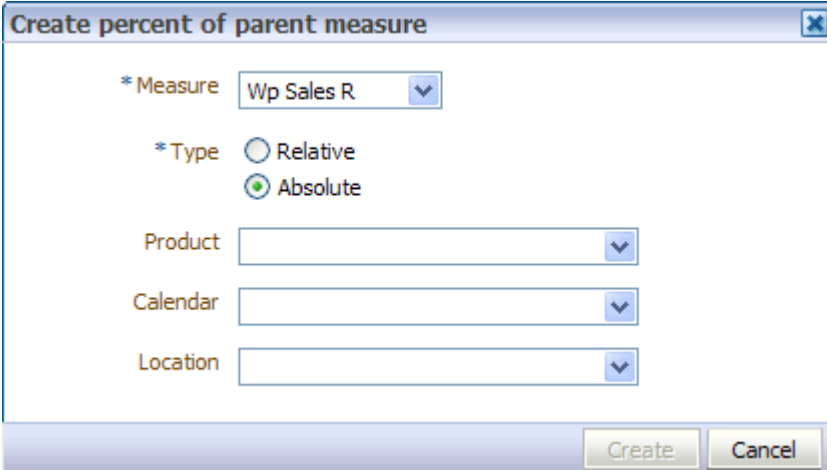
The dialog box titled "Create percent of parent measure" contains the following fields:

- \* Measure: Wp Sales R (dropdown)
- \* Type:  Relative,  Absolute
- \* Dimension: Calendar (dropdown)

Buttons: Create, Cancel

4. In the Create Percent-of-Measure dialog box, change the Type to **Absolute**. The dialog box refreshes and displays drop-down lists for all the dimensions. These lists contain the levels that are available for that dimension. Figure 10-4. These levels are defined by the intersection of the measure.

**Figure 10-4 Create Percent-of-Parent Measure - Absolute**



The dialog box titled "Create percent of parent measure" contains the following fields:

- \* Measure: Wp Sales R (dropdown)
- \* Type:  Relative,  Absolute
- Product: (empty dropdown)
- Calendar: (empty dropdown)
- Location: (empty dropdown)

Buttons: Create, Cancel

- Select the level at which you want to compare the child levels. In [Figure 10-5](#), Half is chosen as the level of Calendar to which the child levels of Week are compared.

**Figure 10-5 Create Absolute Percent-of-Parent Measure at Half**

- When finished defining the parent levels, click **Create**. The view refreshes and the new percent-of-parent measure appears ([Figure 10-6](#)).

**Figure 10-6 Absolute Percent-of-Parent Measure**

		Sprg FY2010				
		2/13/2010	2/20/2010	2/27/2010	3/6/2010	
Wp Sales R		1,228,324.00	46,386.00	43,178.00	40,306.00	45,766.00
Wp Sales R	% Half		4%	4%	3%	4%
Wp Sales C		1,116,658.18	42,169.09	39,252.73	36,641.62	41,605.43
Wp Gross Profit		0.00	0.00	0.00	0.00	0.00

As shown in [Figure 10-6](#), a new percent-of-parent measure has been created for Wp Sales R with a defined parent at the Half level of the Calendar dimension. The measure shows what percentage of the Sprg FY2010 half that each week is. For example, the Wp Sales R for week 2/13/2010 are 4% of the entire Spring half of the 2010 fiscal year.

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**Note:** The % attribute is automatically displayed when creating a percent-of-parent measure. This is because the measure label of the percent-of-parent is the same as the measure that it was created from, and therefore the only way to distinguish them is to show the % attribute.

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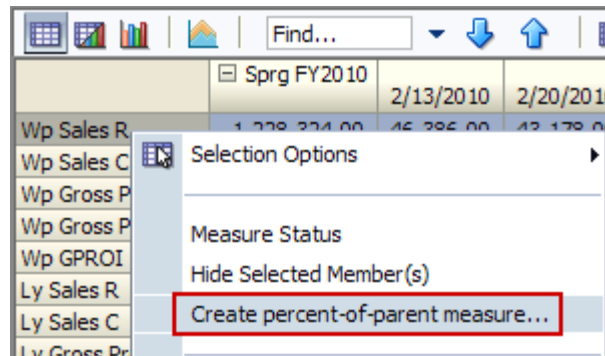
## Relative

The relative type of percent-of-parent measure calculates the value for a given level, which is the percentage that level is of the immediate parent level displayed in the view. This type can only be set for a single dimension.

To create a relative percent-of-parent measure, perform the following steps:

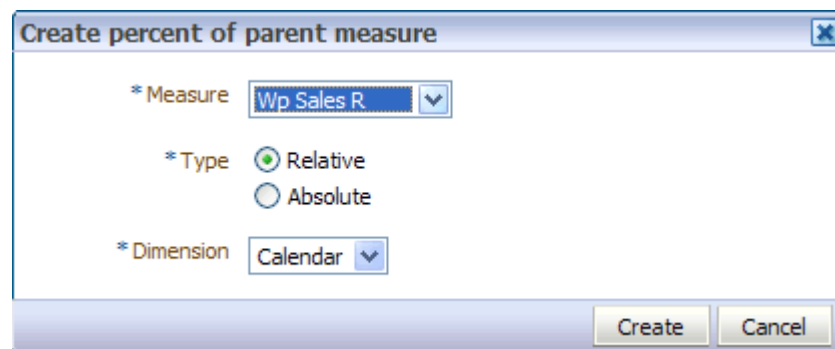
1. Right-click the measure for which you want to create a percent-of-parent measure.
2. The right-click context menu appears. Select the **Create percent-of-parent measure...** as shown in [Figure 10-7](#).

**Figure 10-7 Create Percent-of-Parent Measure Option**



3. The Create Percent-of-Measure dialog box appears ([Figure 10-8](#)). If you right-clicked a valid measure (one that has Total as its aggregation) in Step 1, then that measure appears in the **Measure** list. If not, then you must select a valid measure from the list.

**Figure 10-8 Create Percent-of-Parent Measure Dialog Box**



4. In the Create Percent-of-Measure dialog box, select the dimension for which you want to set the parent level.
5. Click **Create**. The view refreshes and the new percent-of-parent measure appears.

**Figure 10–9 Relative Percent-of-Parent Measure**

	FY2010	Sprg FY2010	2/13/2010	2/20/2010	2/27/2010
Wp Sales R	1,954,170.00	1,228,324.00	46,386.00	43,178.00	40,306.00
Wp Sales R % Calendar		63%	4%	4%	3%
Wp Sales C	1,776,518.18	1,116,658.18	42,169.09	39,252.73	36,641.82
Wp Gross Profit	0.00	0.00	0.00	0.00	0.00

As shown in Figure 10–9, a new percent-of-parent measure has been created for Wp Sales R with a defined dimension of Calendar. Because a dimension is defined and not a specific level of a dimension, the percent-of-parent data shown is relative. This means that the percentage shown is compared to the next level shown in the view.

For example, the Wp Sales R for week 2/13/2010 make up 4% of the next level shown, which is Sprg FY2010. Accordingly, Sprg FY2010 makes up 63% of FY2010. There is no percentage shown for FY2010 because there is not a higher level within the workbook.

### Comparing Absolute and Relative Percent-of-Parent Measures

The difference between an absolute percent-of-parent measure and a relative one is that the parent level for absolute is specified by the user. The parent level for relative is not specified—it is the next parent level shown in the view.

**Figure 10–10 Comparing Absolute and Relative Percent-of-Parent Measures**

	Calendar	FY2010	Sprg FY2010	Feb FY2010	2/13/2010	2/20/2010
Wp Sales R		1,954,170.00	1,228,324.00	175,636.00	46,386.00	43,178.00
Wp Sales R % Half	Absolute			14%	4%	4%
Wp Sales R % Calendar	Relative		63%	14%	26%	25%
Wp Sales C		1,776,518.18	1,116,658.18	159,669.09	42,169.09	39,252.73
Wp Gross Profit		0.00	0.00	0.00	0.00	0.00

As shown in Figure 10–10, the absolute percent-of-parent measure for Wp Sales R has an attribute **%Half**. This means that the child levels are only compared to the parent level Half.

The relative percent-of-parent measure is also for Wp Sales R, but its attribute is specified as **%Calendar**. This means that the child levels are compared to the parent shown in the view that is immediately above them.

Since the absolute percent-of-parent measure specifies Half as the parent level, the other levels shown in the view, Week and Month, are compared to Half. For instance, week 2/13/2010 is 4% of the half Sprg FY2010. Month Feb FY2010 is 14% of the half Sprg FY2010. Because Half is the specified parent, it does not show what percentage of year FY2010 it is.

However, the relative percent-of-parent measure only specifies the Calendar dimension as the parent. This means that any parent level shown in the view can act as the parent. Therefore, week 2/13/2010 is 26% of its immediate parent level, which is month Feb FY2010. Feb FY2010 is 14% of its immediately displayed parent level, which is Sprg FY2010. Finally, Sprg FY2010 is 63% of its immediately displayed parent level, FY2010. The relationship of month to quarter (the configured parent of the month level) is not displayed since quarter is not displayed in the view.

If the month level of the Calendar dimension were hidden in this view, then the relative percent-of-parent measure would look more like the absolute one since the immediately displayed parent level for week would be Half, which is the specified absolute parent. This is illustrated in [Figure 10-11](#).

**Figure 10-11 Comparing Absolute and Relative Percent-of-Parent Measures at Half**

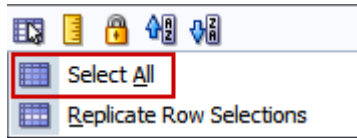
		Calendar	FY2010	Sprg FY2010	2/13/2010	2/20/2010
Absolute	Wp Sales R		1,954,170.00	1,228,324.00	46,386.00	43,178.00
	Wp Sales R	% Half			4%	4%
Relative	Wp Sales R	% Calendar		63%	4%	4%
	Wp Sales C		1,776,518.18	1,116,658.18	42,169.09	39,252.73
	Wp Gross Profit		0.00	0.00	0.00	0.00

## Select All

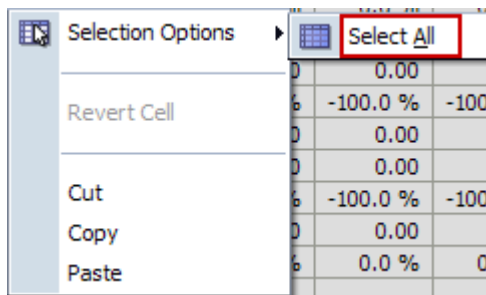
You can select all cells in the current slice by using the Select All option. This is useful if you need to select all instances within a large view.

The Select All option is located in the toolbar as well as in the right-click context menu.

**Figure 10–12 Select All Option in Toolbar**



**Figure 10–13 Select All Option in Right-click Context Menu**



To select all cells in the current slice, use one of the following methods:

### Select All: Method 1

1. Click the **Selection Options** icon in the toolbar.
2. From the drop-down list, click **Select All**.

All the cells in the current slice are selected.

### Select All: Method 2

1. Right-click a cell in the view.
2. The right-click context menu appears. Click **Selection Options**.
3. From the drop-down list, click **Select All**.

All the cells in the current slice are selected.

## Replicate Selections

In the RPAS Fusion Client, you have the ability to select all instances of a particular level at once with the Replicate Selections feature. This is useful if you need to select all instances within a large view.

To select instances using the Replicate Selections feature, perform the following steps:

1. Select an instance of the particular level for which you want to select all instances. You can select a single cell or an entire row or column.

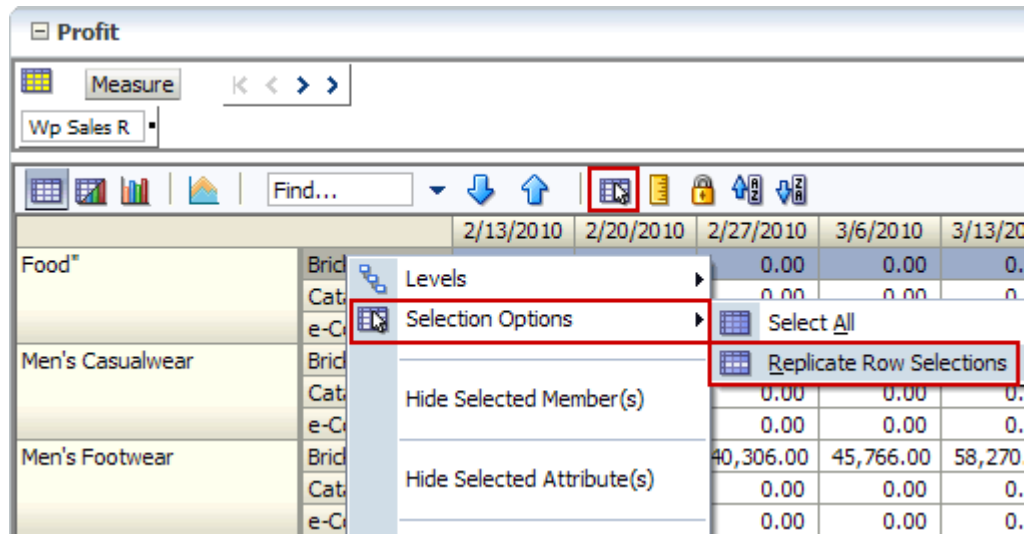
**Figure 10–14** *Replicating Selections*

The screenshot shows a data table in the RPAS Fusion Client. The table has columns for Channel, Date, and Profit. The 'Brick & Mortar' channel is selected for replication. The table is filtered by 'Profit' and 'Brick & Mortar'.

Channel [L...]	2/13/2010	2/20/2010	2/27/2010	3/6/2010	3/13/2010
Food™	0.00	0.00	0.00	0.00	0.00
Catalog	0.00	0.00	0.00	0.00	0.00
e-Commerce	0.00	0.00	0.00	0.00	0.00
Men's Casualwear	46,386.00	43,178.00	40,306.00	45,766.00	58,123.00
Catalog	0.00	0.00	0.00	0.00	0.00
e-Commerce	0.00	0.00	0.00	0.00	0.00
Men's Footwear	0.00	0.00	0.00	0.00	0.00
Catalog	0.00	0.00	0.00	0.00	0.00
e-Commerce	0.00	0.00	0.00	0.00	0.00
Non-food Consumer Goods™	0.00	0.00	0.00	0.00	0.00
Catalog	0.00	0.00	0.00	0.00	0.00
e-Commerce	0.00	0.00	0.00	0.00	0.00
Women's Casualwear	0.00	0.00	0.00	0.00	0.00
Catalog	0.00	0.00	0.00	0.00	0.00
e-Commerce	0.00	0.00	0.00	0.00	0.00
Women's Footwear	20,138.00	24,229.00	25,561.00	24,923.00	23,456.00
Catalog	0.00	0.00	0.00	0.00	0.00
e-Commerce	0.00	0.00	0.00	0.00	0.00

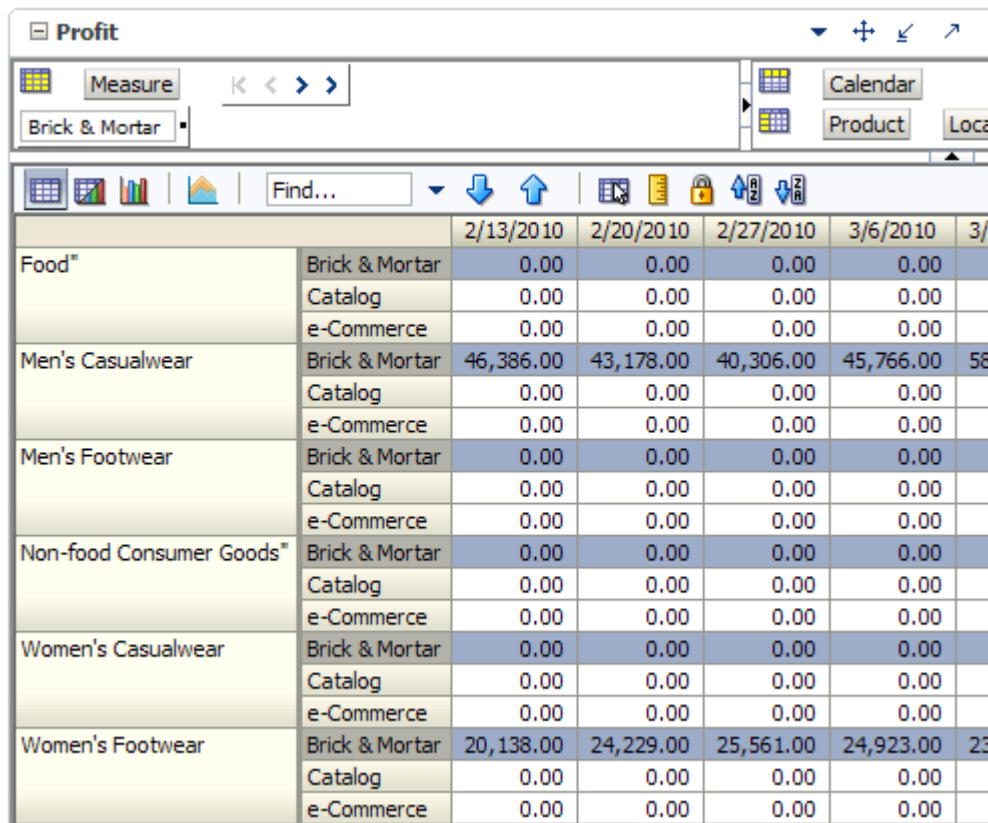
- Click the **Selection Options** icon in the toolbar. Or, right-click the measure and from the right-click context menu select **Selection Options**. Then, click **Replicate [Row/Column] Selections**.

**Figure 10–15 Replicate Selections Option**



- The view refreshes and all instances of the chosen level are selected.

**Figure 10–16 Replicated Selections in the View**





## Using Replicate Selections to Copy and Paste

Perform the following steps to copy an instance of a particular level and paste it to all other instances of that level:

1. Right-click an instance of the particular level for which you want to copy and paste to all other instances. You can select a single cell or an entire row or column.
2. The right-click context menu appears. Select the **Copy** option.

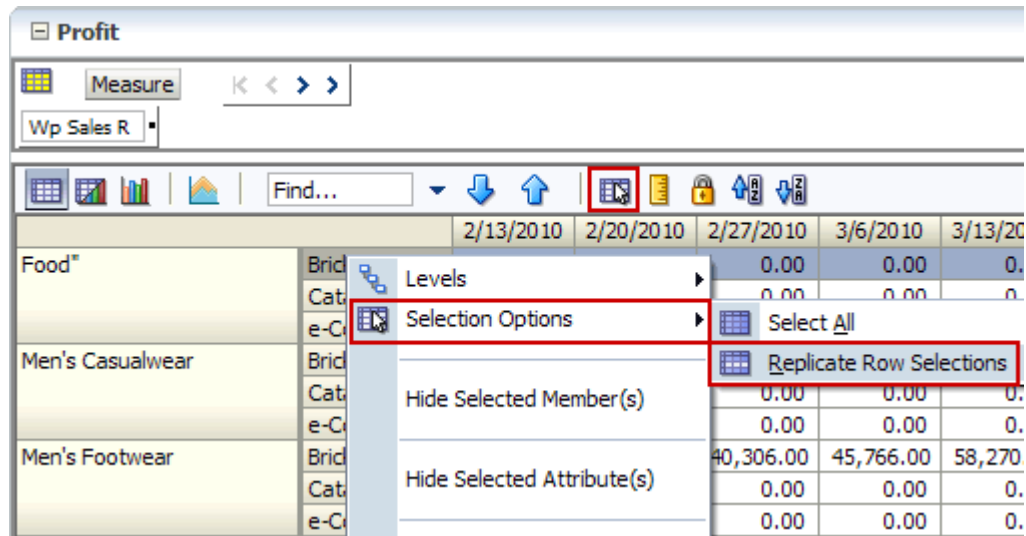
**Figure 10–17** Using Replicate Selections to Copy and Paste

The screenshot shows the Profit application interface. The main window displays a data table with columns for dates (2/13/2010, 2/20/2010, 2/27/2010, 3/6/2010, 3/13/2010) and rows for various product categories and their sub-levels. A right-click context menu is open over the 'Copy' option, which is highlighted with a red box. The 'Copy' option is the second item in the menu, below 'Revert Cell' and above 'Paste'.

		2/13/2010	2/20/2010	2/27/2010	3/6/2010	3/13/2010
Food™	Brick & Mortar	0.00	0.00	0.00	0.00	
	Catalog	0.00	0.00	0.00	0.00	
	e-Commerce	0.00	0.00	0.00	0.00	
Men's Casualwear	Brick & Mortar	46,386.00	43,178.00	40,306.00	45,766.00	58,000.00
	Catalog	0.00	0.00	0.00	0.00	
Men's Footwear	Brick & Mortar	0.00	0.00	0.00	0.00	
	Catalog	0.00	0.00	0.00	0.00	
Non-food Consumer Goods™	Brick & Mortar	0.00	0.00	0.00	0.00	
	Catalog	0.00	0.00	0.00	0.00	
	e-Commerce	0.00	0.00	0.00	0.00	
Women's Casualwear	Brick & Mortar	0.00	0.00	0.00	0.00	
	Catalog	0.00	0.00	0.00	0.00	
	e-Commerce	0.00	0.00	0.00	0.00	
Women's Footwear	Brick & Mortar	61.00	24,923.00	23,000.00	23,000.00	
	Catalog	0.00	0.00	0.00	0.00	
	e-Commerce	0.00	0.00	0.00	0.00	

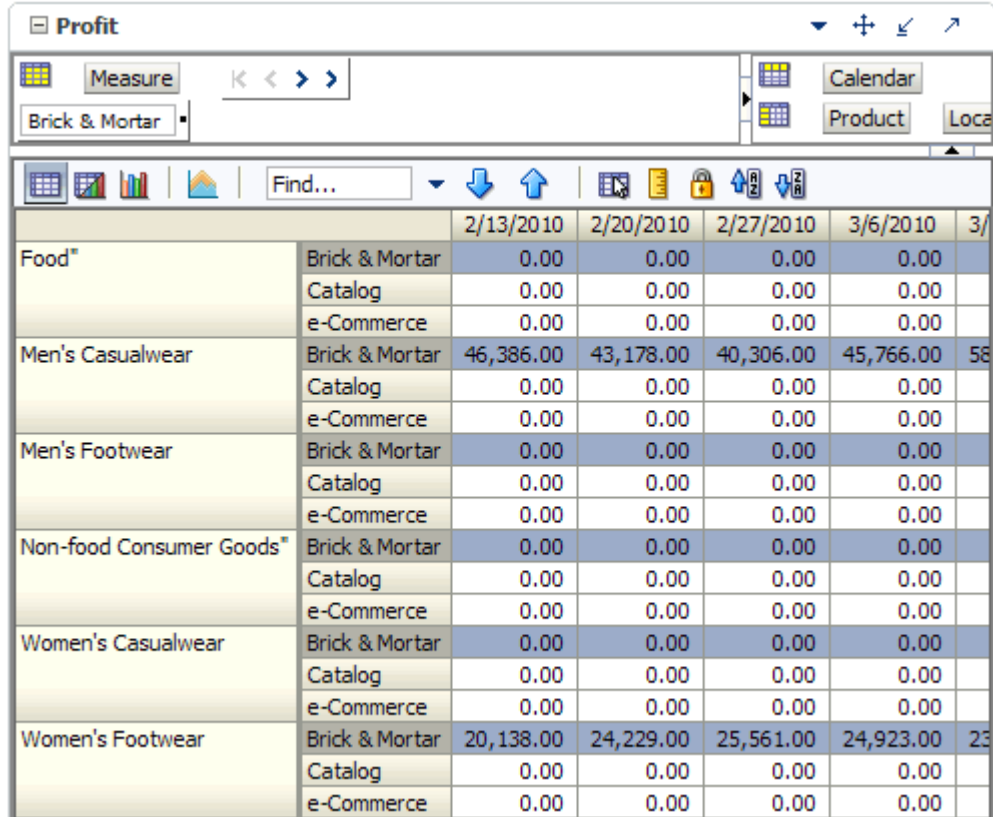
3. Select the same instance again. Either click the **Selection Options** icon in the toolbar, or right-click and select **Selection Options** from the right-click context menu. Then, click **Replicate [Row/Column] Selections**.

**Figure 10–18 Replicate Selections Option**



4. The view refreshes and all instances of the chosen level are selected.

**Figure 10–19 Replicated Selections in the View**



- With all the instances of that particular level highlighted, right-click and select the **Paste** option.

The view refreshes, and all the selected instances contain the copied information.

**Figure 10–20 Replicated Selections**

The screenshot shows a software window titled "Profit" with a table of sales data. The table has columns for dates (2/13/2010, 2/20/2010, 2/27/2010, 3/6/2010, 3/13/2010) and rows for product categories (Food, Men's Casualwear, Men's Footwear, Non-food Consumer Goods, Women's Casualwear, Women's Footwear) and sales channels (Brick & Mortar, Catalog, e-Commerce). The sales figures for the 'Brick & Mortar' channel are highlighted in blue across all rows, indicating that this information has been replicated to all instances of that level.

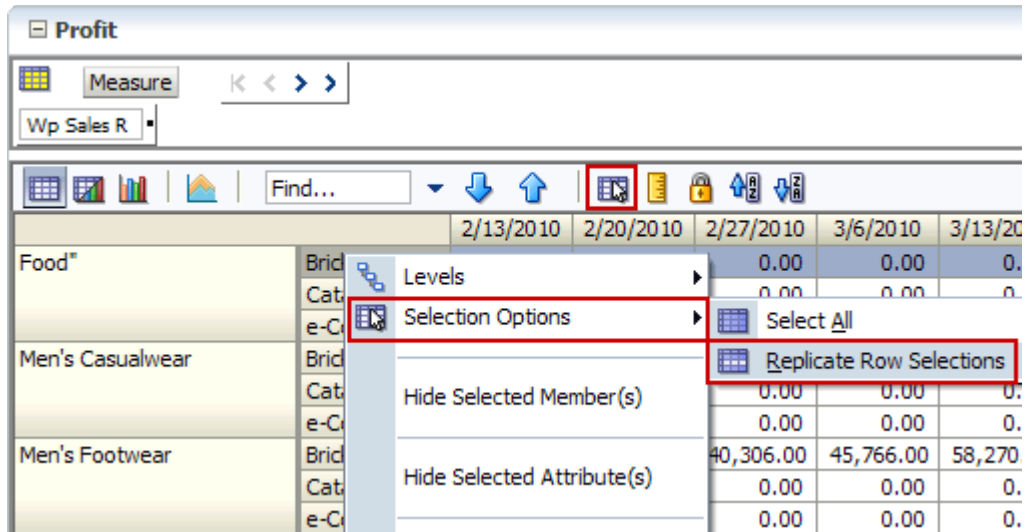
		2/13/2010	2/20/2010	2/27/2010	3/6/2010	3/13/2010
Food	Brick & Mortar	46,386.00	43,178.00	40,306.00	45,766.00	58,000.00
	Catalog	0.00	0.00	0.00	0.00	0.00
	e-Commerce	0.00	0.00	0.00	0.00	0.00
Men's Casualwear	Brick & Mortar	46,386.00	43,178.00	40,306.00	45,766.00	58,000.00
	Catalog	0.00	0.00	0.00	0.00	0.00
	e-Commerce	0.00	0.00	0.00	0.00	0.00
Men's Footwear	Brick & Mortar	46,386.00	43,178.00	40,306.00	45,766.00	58,000.00
	Catalog	0.00	0.00	0.00	0.00	0.00
	e-Commerce	0.00	0.00	0.00	0.00	0.00
Non-food Consumer Goods	Brick & Mortar	46,386.00	43,178.00	40,306.00	45,766.00	58,000.00
	Catalog	0.00	0.00	0.00	0.00	0.00
	e-Commerce	0.00	0.00	0.00	0.00	0.00
Women's Casualwear	Brick & Mortar	46,386.00	43,178.00	40,306.00	45,766.00	58,000.00
	Catalog	0.00	0.00	0.00	0.00	0.00
	e-Commerce	0.00	0.00	0.00	0.00	0.00
Women's Footwear	Brick & Mortar	46,386.00	43,178.00	40,306.00	45,766.00	58,000.00
	Catalog	0.00	0.00	0.00	0.00	0.00
	e-Commerce	0.00	0.00	0.00	0.00	0.00

## Using Replicate Selections for the Chart View

Perform the following steps to use the replicate selection function to create a particular chart view.

1. Select an instance of the particular level for which you want to select all instances to show in a chart view. You can select a single cell or an entire row or column.
2. Click the Selection Options icon from the toolbar. Or, right-click and select **Selection Options** from the right-click context menu. Then click **Replicate [Row/Column] Selections**.

Figure 10–21 Replicate Selections Option



3. The view refreshes and all instances of the chosen level are selected.

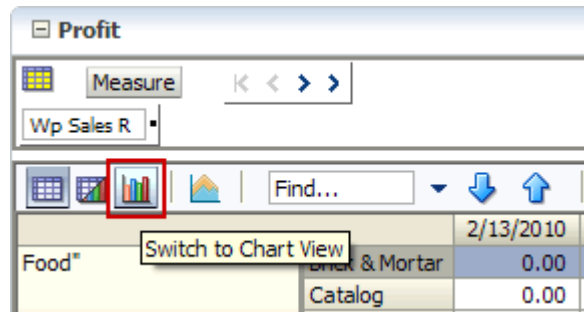
Figure 10–22 Replicated Selections in the View

The screenshot shows the Profit view after the replication process. The measure is 'Brick & Mortar'. The data table is refreshed, and all instances of the 'Brick & Mortar' level are selected (highlighted in blue). The data table shows categories like 'Food', 'Men's Casualwear', 'Men's Footwear', and 'Non-food Consumer Goods' with columns for dates: 2/13/2010, 2/20/2010, 2/27/2010, 3/6/2010, and 3/13/2010.

		2/13/2010	2/20/2010	2/27/2010	3/6/2010	3/13/2010
Food™	Brick & Mortar	0.00	0.00	0.00	0.00	0.00
	Catalog	0.00	0.00	0.00	0.00	0.00
	e-Commerce	0.00	0.00	0.00	0.00	0.00
Men's Casualwear	Brick & Mortar	46,386.00	43,178.00	40,306.00	45,766.00	58,270.00
	Catalog	0.00	0.00	0.00	0.00	0.00
	e-Commerce	0.00	0.00	0.00	0.00	0.00
Men's Footwear	Brick & Mortar	0.00	0.00	0.00	0.00	0.00
	Catalog	0.00	0.00	0.00	0.00	0.00
	e-Commerce	0.00	0.00	0.00	0.00	0.00
Non-food Consumer Goods™	Brick & Mortar	0.00	0.00	0.00	0.00	0.00
	Catalog	0.00	0.00	0.00	0.00	0.00
	e-Commerce	0.00	0.00	0.00	0.00	0.00

4. With all the instances of that particular level highlighted, click the **Switch to Chart View** icon.

**Figure 10–23 Switch to Chart View Icon**



The chart view appears. Only the selected instances are shown in the chart. In [Figure 10–24](#), the chart only shows data for the Brick & Mortar because those were the selected instances.

**Figure 10–24 Replicated Selections in Chart View**

