Oracle® Retail Predictive Application Server Cloud Edition

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Oracle Retail Predictive Application Server Cloud Edition User Guide, Release 17.0

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Preface

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

Audience

This User Guide is intended for retailers and analysts.

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Related Documents

For more information, see the following documents in the Oracle Retail Advanced Science Cloud Services documentation set:

- *Oracle Retail Predictive Application Server Cloud Edition Online Administration Guide*
- *Oracle Retail Predictive Application Server Cloud Edition Configuration Tools Guide for Developers*
- *Oracle Retail Predictive Application Server Cloud Edition Release Notes*

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

1

Getting Started

Welcome to Oracle Retail RPAS Cloud Edition (RPASCE). This chapter provides an overview that includes information to help you get started with the application.

Overview

RPASCE is a configurable cloud-engineered platform with a proven scalability for developing multidimensional forecasting and planning-based solutions with an enhanced user experience. The RPASCE client is a web-based platform developed using the latest Oracle JavaScript Extension Toolkit (OJET).

Planning is one of the most important and complex processes in a retail business. It typically involves a set of activities that must be followed as part of a workflow. The RPASCE Client includes an Activity Task Flow feature that provides a robust workflow that makes each planning activity easier to track and maintain.

Essential Concepts

RPASCE 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 describes the basic concepts of RPASCE.

Multidimensionality

In RPASCE, information is stored and represented based on a 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 RPASCE 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, Levels, and Positions

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

RPASCE supports many alternative dimensions that provide different roll ups and can help you analyze the data from differing perspectives.

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.

Cells

Cells contain the data or values where the positions and measures intersect with the levels of the dimensions.

Workspaces and Domains

RPASCE 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 RPASCE solution, you interact with the solution through a personal data repository called a workspace. A workspace contains the subset of the data (and metadata) from the domain, and its scope is constrained by the access rights available to a user. Workspaces are stored on the RPASCE 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 workspace are copied from the domain, the data remains independent of the domain.

With a solution task-flow, you are logged into a solution. When you pick a particular task, you are directed to build a segment. Based on the selection, the segment is created and can only access the data that was selected while building the segment. User position level security is also considered during this process and displays only the data you have access to.

Dashboard

The profile-based dashboard with summary KPI tiles that help user to focus on what needs attention. The profiles are tailored to the role and business process (for example, Admin, Pre-Season, In-Season, and Exception) with summary KPIs and detailing the KPIs in a visual representation using dynamic charts. You can easily personalize the Dynamic Hierarchy layout and access the recent plans that you have worked on.

Dynamic Hierarchy

The dynamic roll-up of store to cluster in a workspace depends on the product dimension and it can be done without rebuilding the workspace. Note that, for a particular product department, a store can change from a high volume store to a medium volume store cluster. This refresh can be triggered using a custom menu. The refreshing of the dynamic hierarchy does not require the refreshing of the entire workspace.

Setting Up Your Browser

The RPASCE Client can be accessed using Microsoft Internet Explorer, Google Chrome, or Mozilla Firefox. Before you access the application for the first time, you must set the following browser settings to allow seamless and error-free access.

- Cache settings
- Security settings

Cache Settings

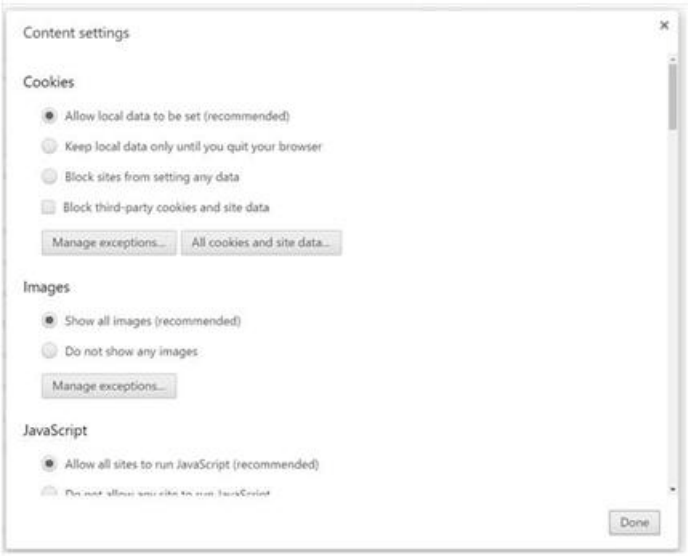
The RPASCE Client can leverage the browser cache for a better experience. However, it is recommended that you clear the browser's cache periodically so that temporary internet files are deleted, especially with version updates. The cache settings are typically found in the browser's tool menu.

Security Settings

Ensure that JavaScript and Cookies are enabled on your browser. These may be the default settings in most cases; if not, ensure that this is the case using the following steps.

On Chrome, click **Customize and Control Google Chrome** button in order to access Settings->Privacy-> Content Settings.

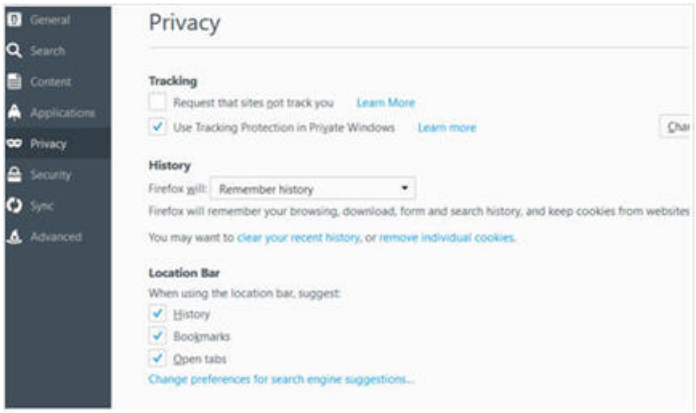
Figure 1–1 Chrome Content Settings



On Firefox, to check or change your settings, complete the following steps:

1. Click the Tools drop-down list button and select **Options**.
2. Select the **Privacy** panel.
3. Check for **History**.

Figure 1–2 Privacy

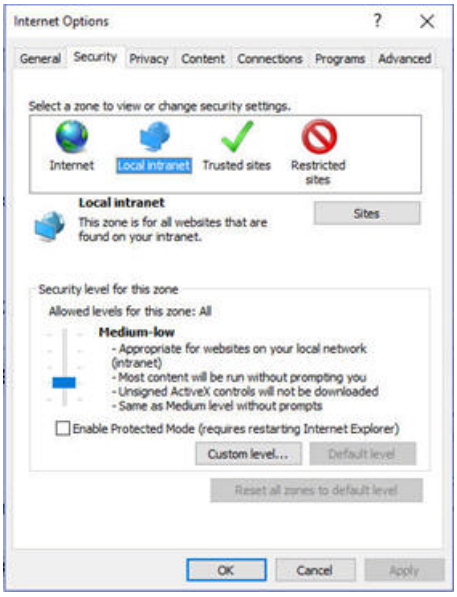


By default, Firefox enables the use of JavaScript and requires no additional setup.

If using Internet Explorer, you must configure the browser security settings to improve the user experience. To set the security settings, complete the following steps:

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

Figure 1–3 Internet Options



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**.

6. On the Local intranet window, click **OK**.
7. In the Security level for this zone area, click **Custom level....**
8. Click **Enable for Active Scripting** in the Scripting section.
9. After you set up these parameters, click **OK**. A message appears that prompts you for a confirmation of 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 Internet Explorer for the changes to take effect.

Similarly, make sure cookies are enabled on IE. Select the Privacy tab, and under Settings, select Advanced and make sure you have first party cookies and third party cookies selected.

Logging Into RPASCE

This section details the available logging scenarios.

Before you log into RPASCE, ensure that your system meets the recommended configuration requirements.

After you check the configuration, obtain the following information:

- **Uniform Resource Locator, URL:** Enter or click the application URL in the web browser or shortcut provided by your Administrator to access the application. For example:

  http://<fullyqualifieddomainname>:<port>/context root

- **User name and Password:** Based on the tasks you want to perform, obtain a user account (that includes user name and password) to log into the application. Once logged into the application, log in with Username and Password for notifications.

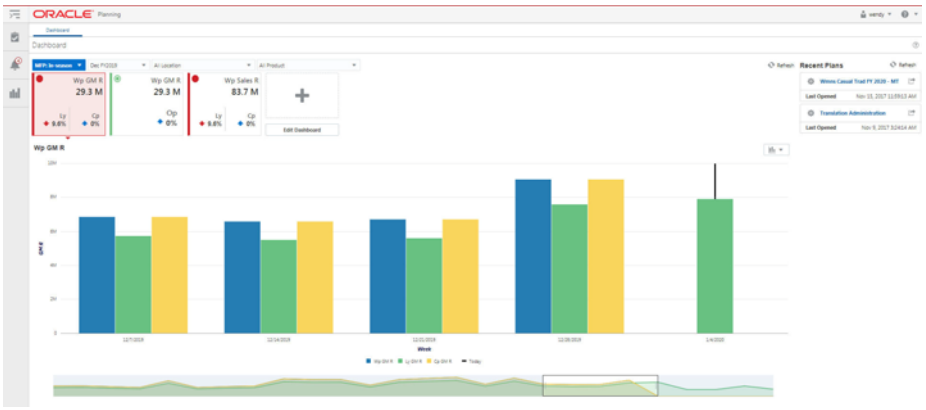
What you see when logging in depends on the type of external authentication used. The RPASCE login page appears only when you use Oracle Access Manager (OAM) for authentication.

To log into the RPASCE:

1. Open a supported internet browser.
2. In the Address bar, enter the RPASCE URL and click **Enter**.
3. Enter the Username and Password details and click **Log In**.
4. If the notification server login is required, enter the notifications username and password after logging into the application. Enter the notification login details.

   The RPASCE Home page appears.

Figure 1–4 RPASCE Home Page



With Single Sign-On, the Single Sign-On login page is displayed. If you are using Single Sign-on (SSO), you may select a link in a portal and then see the home page.

Figure 1–5 Login Window

The RPASCE Login page appears.

Logging in Using Single Sign-On

If you have accessed the RPASCE through a single sign-on environment, you see the home page of the RPAS CE.

Note: For more information about single sign-on (SSO), see the *Oracle Retail Predictive Application Server Cloud Edition Online Administration Guide*.

Concurrent Sessions

If you already have a user session for RPASCE running, you can start a second or concurrent session at the same time. This can be a private/incognito window in the same browser or a different browser. When logged into RPASCE, if you have a concurrent session running, you see the following message:

Figure 1–6 Concurrent Sessions

Select one of the following options:

- Create another session (All existing connections will be left open): This option allows the user to have multiple connections. This does not affect any prior user connections.
- Close all existing connections and create a new one. (Any unsaved changes will be lost): This option closes any existing connections for the user and opens a new connection.

> **Note:** For information about the number of allowed concurrent sessions, see the *Oracle Retail Predictive Application Server Cloud Edition Online Administration Guide*.

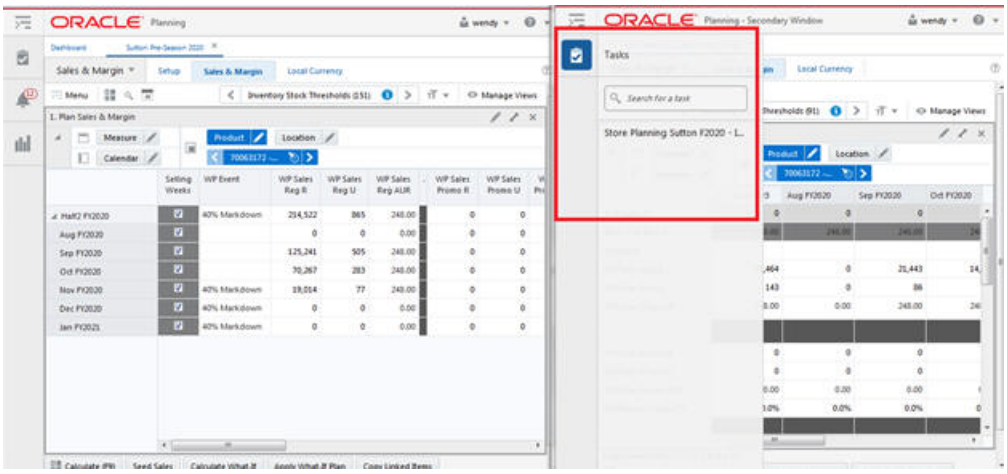
Comparative Analysis

You can use the comparative analysis feature to open multiple segments in such a way that you can view them at the same time and work on them in parallel.

You can launch the view in a separate browser tab in order to do comparative analysis. When you want to do such an analysis, you can go to the recent plans pane and click the launch icon next to the segment name. The secondary tab will not have all the menu options that the primary window has.

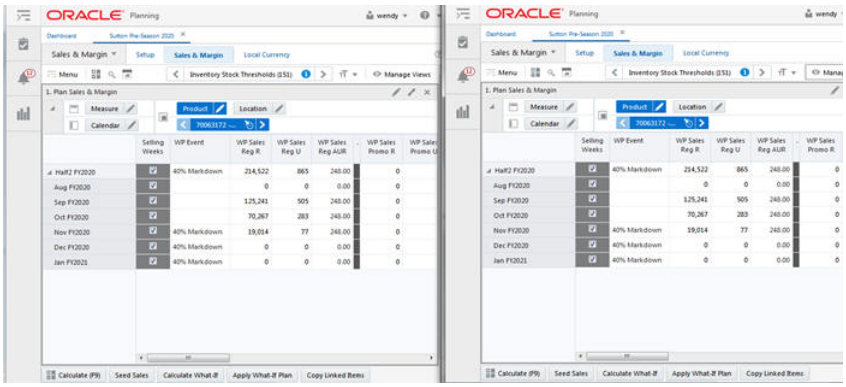
You can only launch and view the single segment in the separate tab. You can navigate through various views in the workspace. However, you cannot navigate between different workspaces; you must close the tab and launch a separate workspace.

Figure 1–7 Comparative Analysis



You can compare the views in the concurrent login sessions. This view is almost similar to the earlier one, except that in the second login you have access to all the features of RPASCE. You are not limited to comparing the one workspace that you opened; you can switch between workspaces, bring up other segments, and conduct separate planning processes using the secondary login.

Figure 1–8 Compare Views in Concurrent Login Sessions

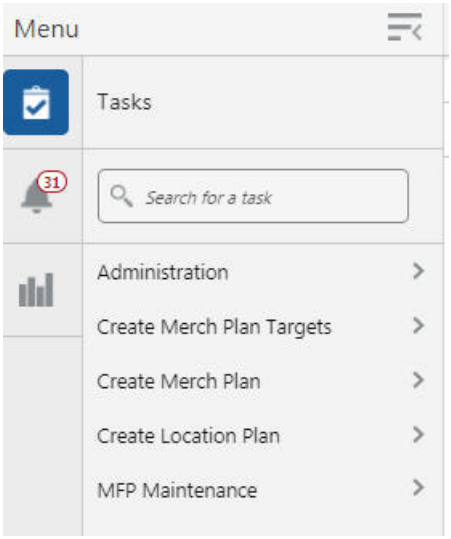


Understanding the Taskflow

Click **Menu** or **Tasks** to display the taskflow. You can use the taskflow to navigate through the activities in the application. It provides a pre-configured business workflow organized into expandable and collapsible activity groups, activities, tasks, steps and substeps.

Each activity consists of more than one task and each task may consist of one or more steps. In RPASCE, each solution (spanning across multiple workbooks) is represented as a set of activities, tasks, steps and substeps. The activities can also be grouped into an activity group.

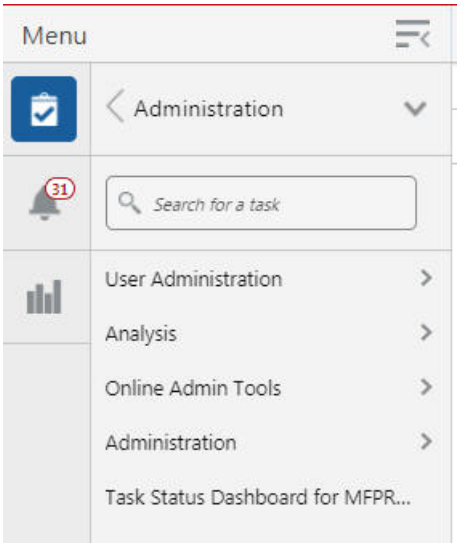
Figure 1–9 Tasks



In the taskflow, you can click the icon next to any task to view the associated steps and substeps.

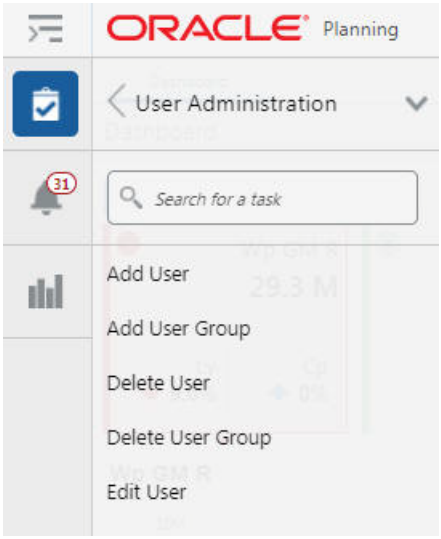
Click on specific task to view the steps associated under the task.

Figure 1–10 Administration Tasks



When you are working with a specific step, click on the icon to display the available substeps.

Figure 1–11 Task Substep



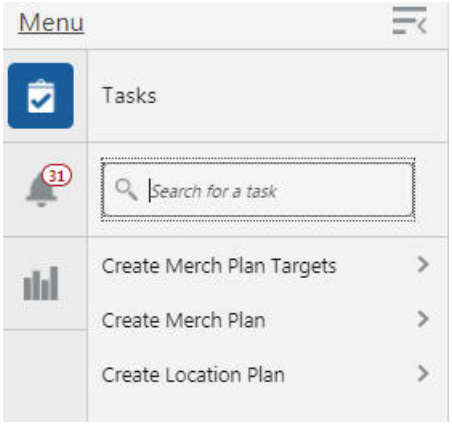
Access-Based Visibility

The activities and tasks that appear in the taskflow 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 *Oracle Retail Predictive Application Server Cloud Edition Online Administration Guide* for more information about the Administration activity. If you do not have access to a workbook template, then you cannot build the workbooks for the associated tasks and steps.

If you do not have administrator access, the Administration activity does not appear in the taskflow.

Figure 1–12 Task Access



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 workspace. In such cases, you do not need to save your work when you

switch between tasks within the same or different workspaces. RPASCE has an exclusive Auto-Save option when any calculation or action is performed on the workspace.

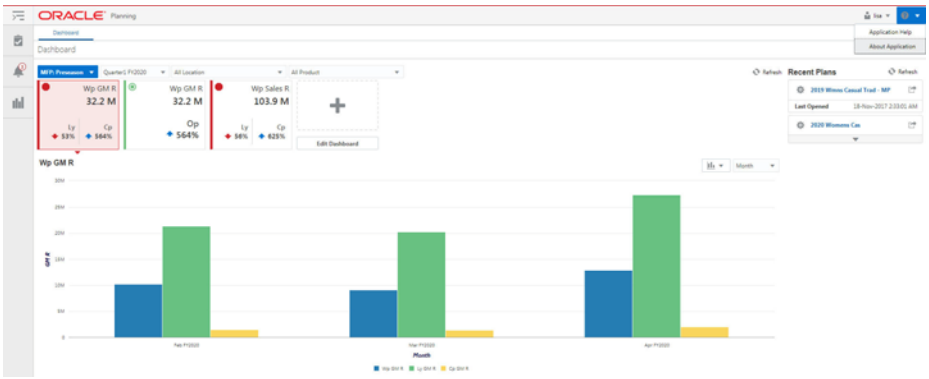
Workspace Operations

The workspace provides you a the personal working copy of data. You can perform large-scale operations such as build, open, refresh, calculate, and commit. Use the workspace to sort, find, format, lock, unlock, and scroll through the page edges.

Locating the Version Number

Click the Question Mark in the top right and select **About Application** to access the Version Number and other information.

Figure 1–13 Accessing About Application



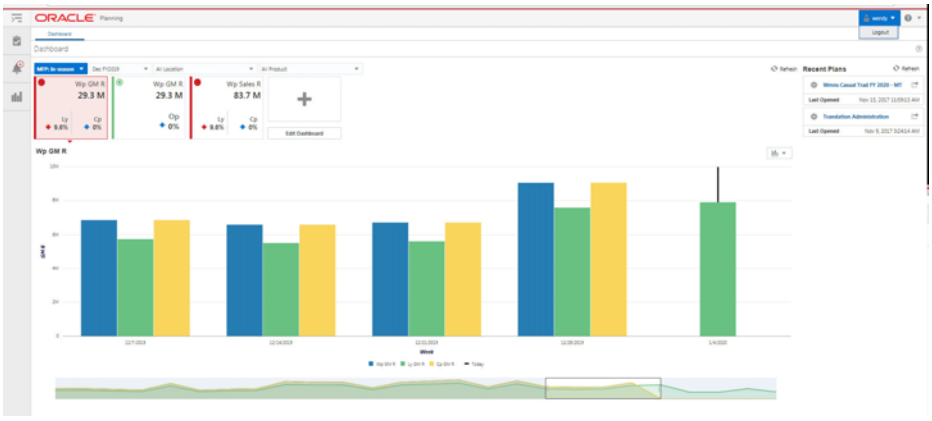
Accessing Online Help

Click the Question Mark in the top right, as shown in Figure 1–13. Select Application Help to access the online help.

Logging Out of the Application

Click the user name in the top right and select **Logout**.

Figure 1–14 Logout

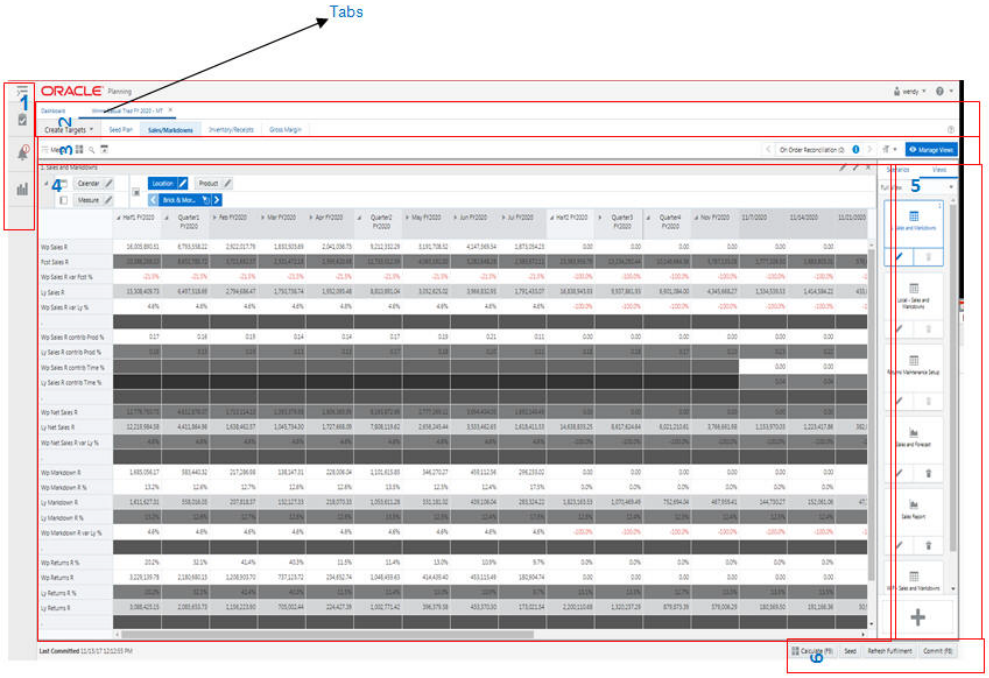


2

User Interface

This chapter introduces you to the user interface for the workbook and describes the screen components labeled in Figure 2–1.

Figure 2–1 User Interface



Here is the key to the figure labels.

1. Left Sidebar Menu
2. Mega Menu
3. Quick Access Toolbar
4. Content Area
5. View Management
6. Action Buttons

Left Sidebar Menu

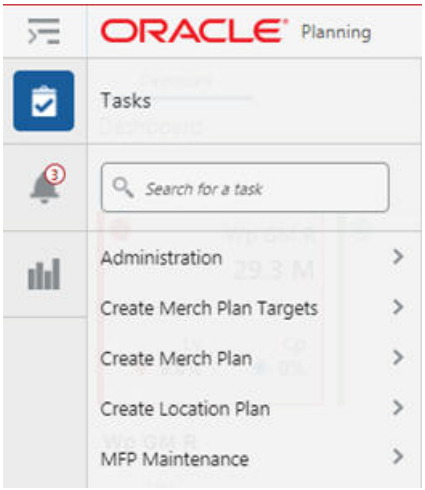
The Left Sidebar menu contains the following options:

- Task Module
- Notifications
- Reports

Task Module

The Task Module provides access to the Segments dialog box that you use to open existing workspaces or create new workspaces to complete the different tasks per role.

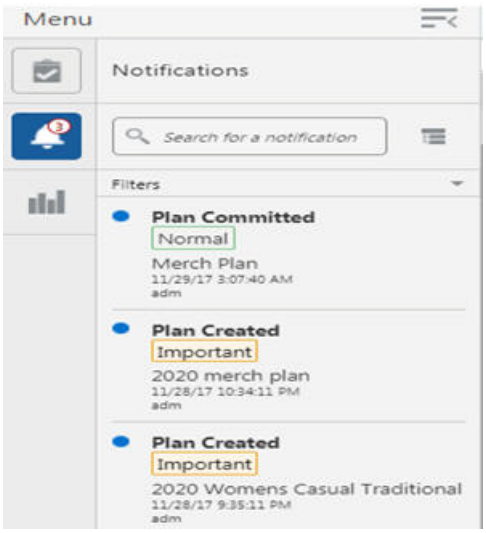
Figure 2–2 Task Module



Notifications

You can use the Notifications module to determine the status of different RPASCE activities, such as Online Administration Tasks, segment build completions or failures, segment commit completions or failures, approvals and rejections, and so on.

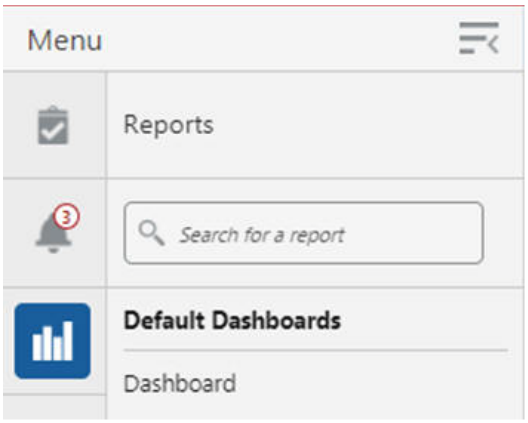
Figure 2–3 Notifications



Reports

You can use the Reports module to view the reports or dashboards available with in the application.

Figure 2–4 Reports Module



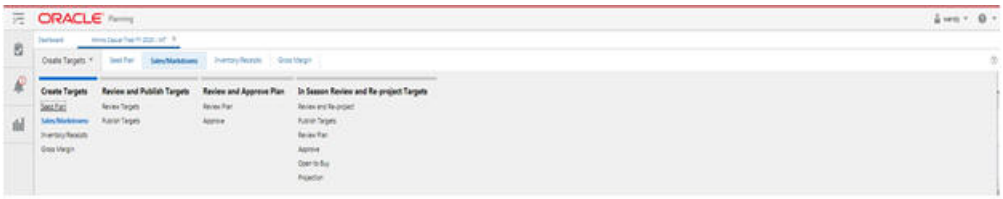
Mega Menu

Once a task or workspace is open, you can use the Mega Menu to access the different workflow steps for each task.

You can move between the different steps within a task without reopening a segment or going through the wizard process again.

Each step has different views to choose from in the View Manager on the right side of the screen. You can use each view to complete a different type of activity.

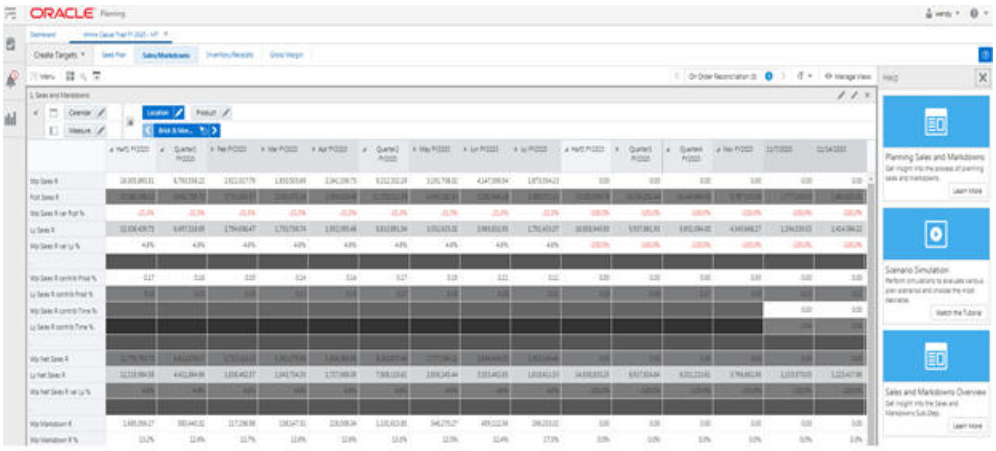
Figure 2–5 Mega Menu



Help

To access the Help menu, click the **Question Mark** in the top right. Select **Application Help** to access the online help.

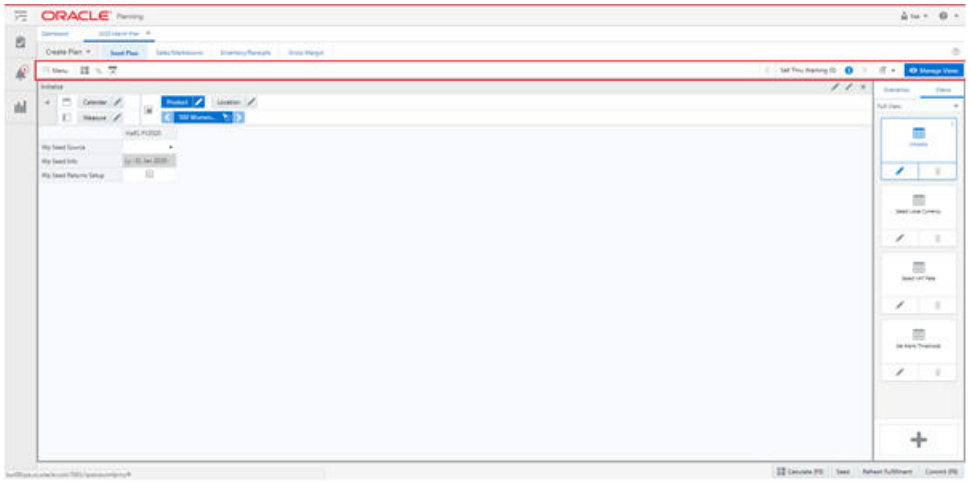
Figure 2–6 Online Help



Quick Access Toolbar

The Quick Access toolbar contains Menu, Calculate, Find, Export, Real Time Alert Exceptions List, Text Size, and Manage Views. These are all described in this section.

Figure 2–7 Quick Access Toolbar



Menu

Menu contains the following menu options:

- Action menu
- Edit menu
- View menu
- Format menu

Figure 2–8 Menu Options

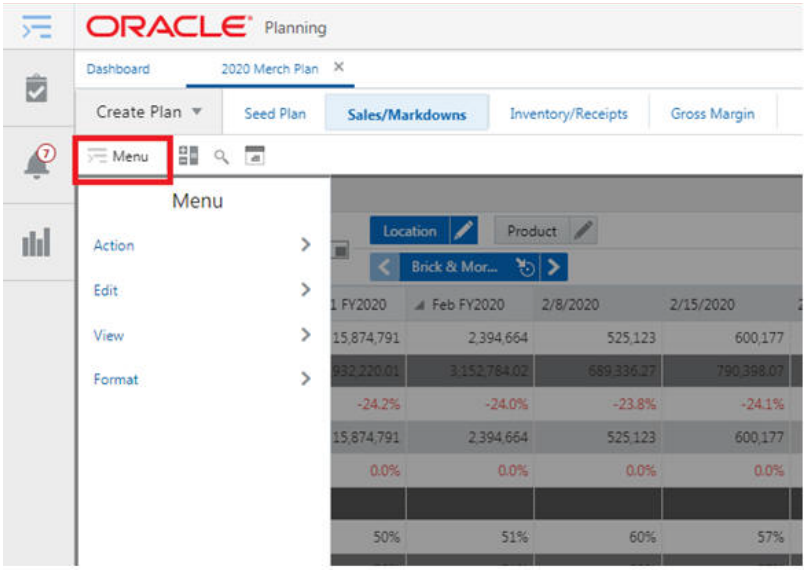


Table 2–1 lists the options within each menu.

Table 2–1 Toolbar Menu Options

Menu	Submenu	Sub-Submenu
Action	Commit	
	Refresh	
Edit	Calculate	
	Find	
	Lock	
	Unlock	
	Unlock All	
View	View Layout	Full View
		2x Horizontal
		2x Vertical
		4x Tiled
	Synchronize Z Axis	
Format	Edit Styles and Exceptions	
	Save Format	Only For Me
		For My Group: Administrators
	Delete Format	Only For Me
		For My Group: Administrators

Action Menu

This section describes the Action Menu options.

Figure 2–9 Action Menu

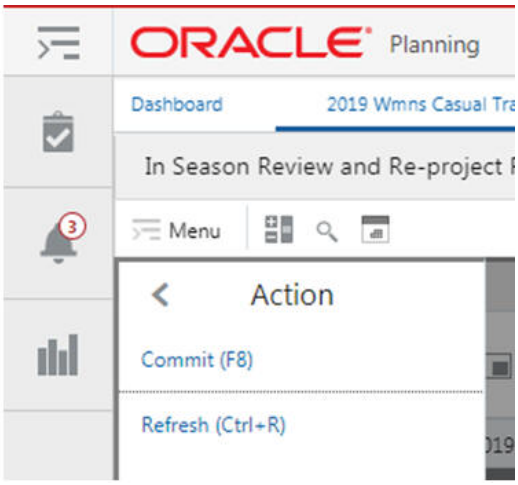


Table 2–2 Action Menu Options

Menu Option	Description
Commit (F8)	Use to commit the changes to the master domain. After the changes are committed, all other users with access to the workbook will see the changes as well.
Refresh (Ctrl + R)	Use to update a workspace 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 workspace. Workspaces can be refreshed with a single refresh rule group or multiple ones

Edit Menu Options

This section describes the Edit Menu options.

Figure 2–10 Edit Menu

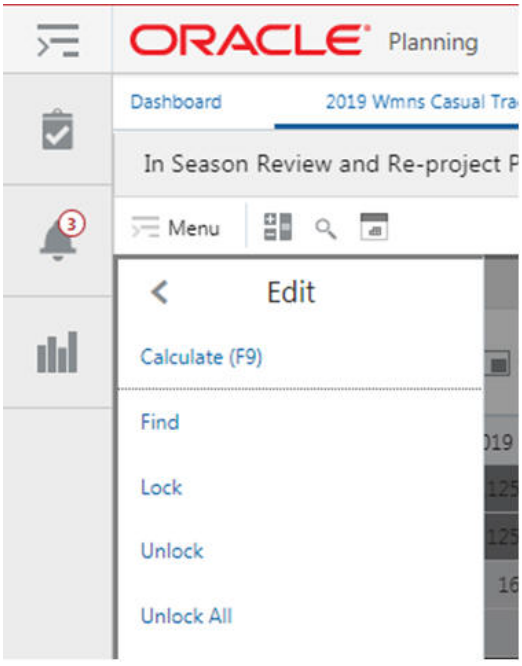


Table 2–3 Edit Menu Options

Menu Option	Description
Calculate (F9)	After you edit the cells within the workspace, use the Calculate icon to calculate and update the associated cells within the workspace.
Find	Use 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.
Lock	Protects cells, measures, and positions from being edited. For more information, see "Locking and Unlocking".
Unlock	Use to remove the protection of cells, measures, and positions so that they can be edited. For more information, see "Locking and Unlocking".
Unlock All	Use to remove the protection from all cells, measures, or positions so that they can be edited. For more information, see "Locking and Unlocking".

View Menu

This section describes the View Menu options.

Figure 2–11 View Menu

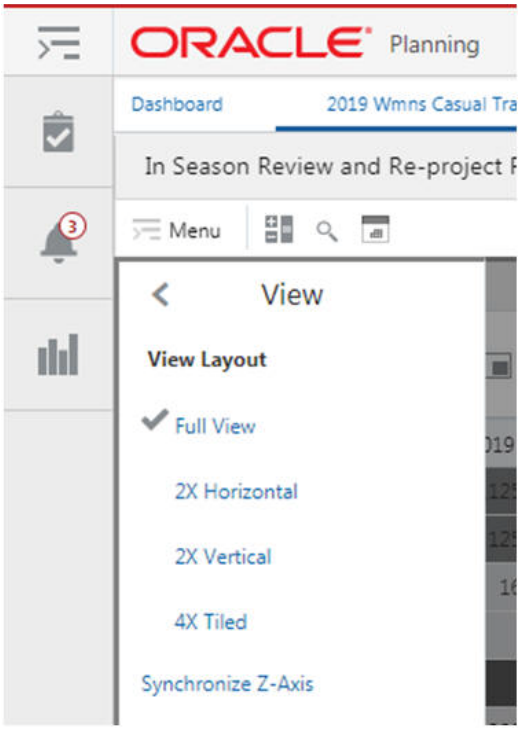


Table 2–4 View Menu Options

Menu Option	Description
View Layout	Full View - Maximizes a single view to cover the entire contents area.
	2X Horizontal - Aligns two views one above the other horizontally.
	2X Vertical - Aligns two views side by side vertically.
	4X Tiled - Aligns four views with one view in each corner of the contents area.
Synchronize Z Axis	Use 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.

Format Menu

This section describes the Format Menu options.

Figure 2–12 Format Menu

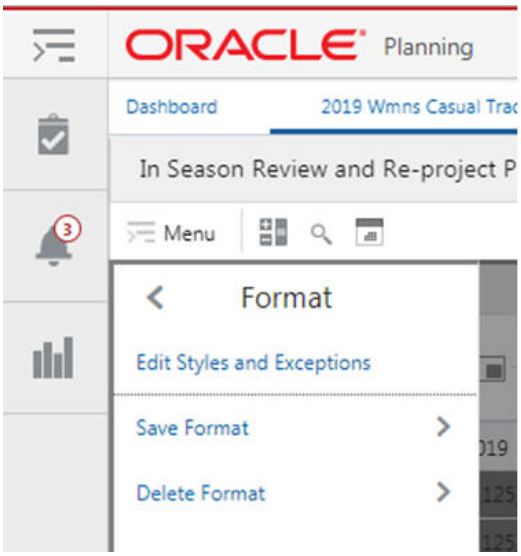


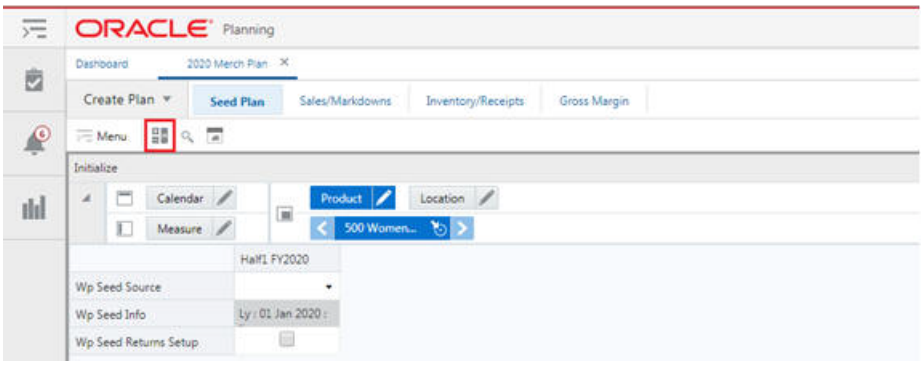
Table 2–5 Format Menu Options

Menu Option	Description
Edit Styles and Exceptions	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 workspace. For more information, see Chapter 10, "Formatting.".
Save Format	Only For Me
	For My Group: Administrators
Delete Format	Only For Me
	For My Group: Administrators

Calculate Button

After you edit the cells within the workbook, use the **Calculate** button to calculate and update the associated cells within the workspace. You can also access this option from the **Edit** menu.

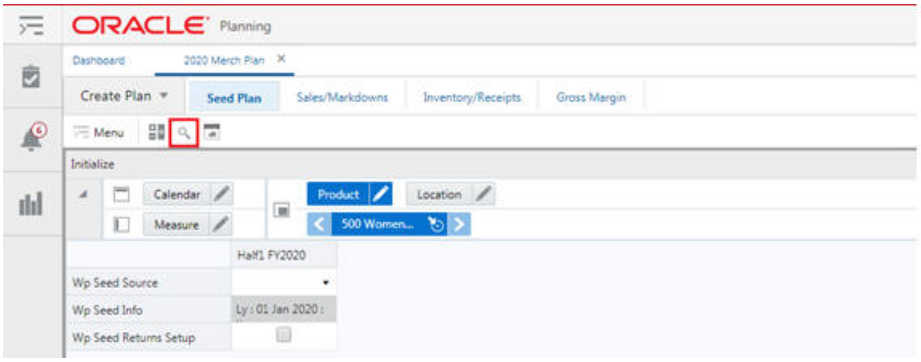
Figure 2–13 Calculate Button



Find Button

You can use the **Find** button to find any specific string with either As-Is or Match case or Whole word. You can also choose to search the string in all views or selected views of the workspace or all dimensions or specific dimensions available in the workspace.

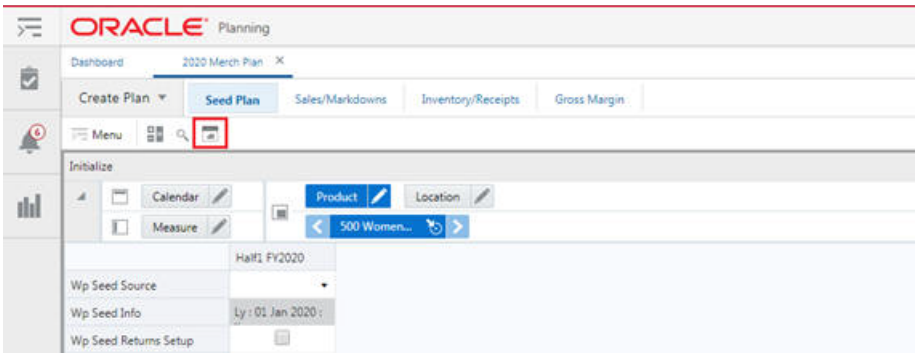
Figure 2–14 Find Button



Export Button

You can use the Export functionality to export slices of data to a text file or to a Microsoft Excel file by using different format and export options. You can print data to an Excel spreadsheet using the **Print** option in the Export dialog box.

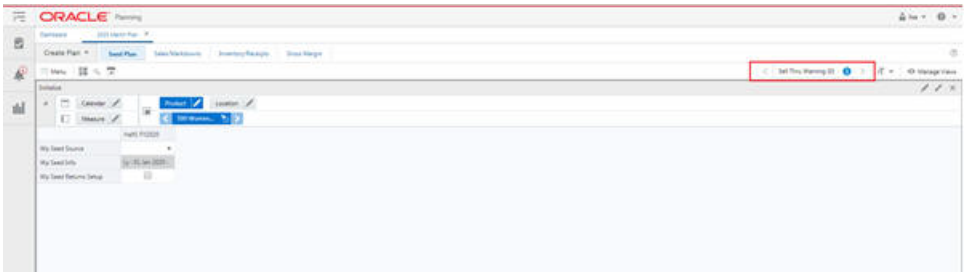
Figure 2–15 Export Button



Real Time Alerts Exceptions List

Real time alerts are interactive alerts that are displayed when you open a workbook or view. The alerts are then updated each time you edit data and click **Calculate**. The alert count summary is displayed along with the capability to know more information as and when needed. Clicking on > launches the alert navigation mode.

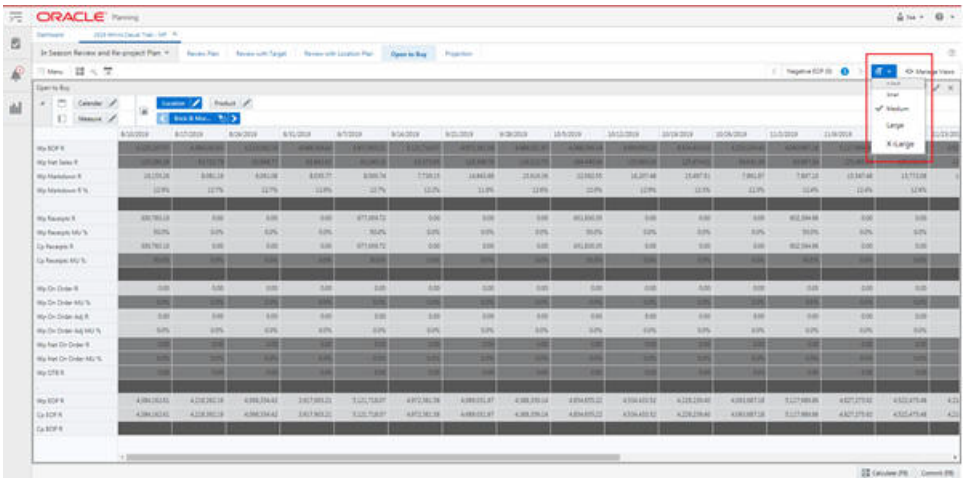
Figure 2–16 Real Time Alerts Exception List



Text Size

Once in an open workspace, click **Text Size** on the top right and select a text size. This allows you to control how much data is displayed on a screen at one time.

Figure 2–17 Text Size



Manage Views

Click **Manage Views** to display the view management drawer. It allows you to show or hide the view management drawer if you need more area to view the content.

Figure 2–18 View Management Drawer: Show

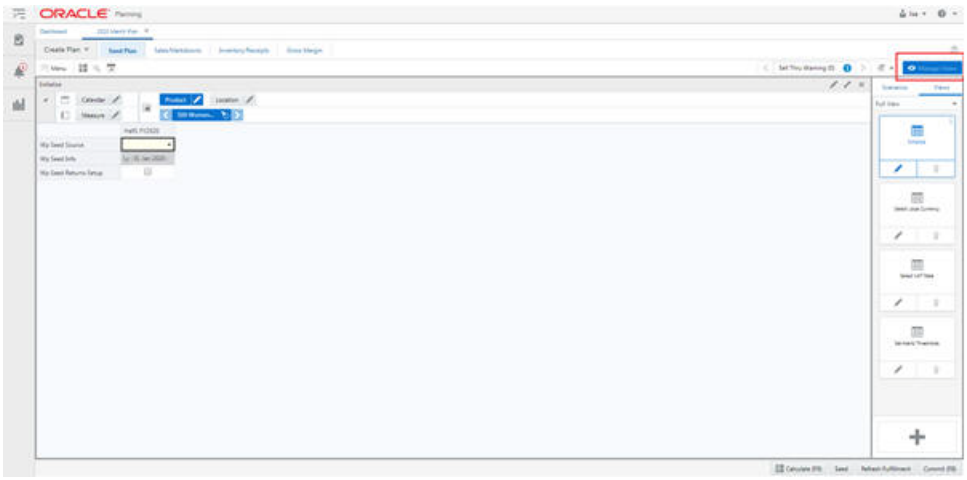
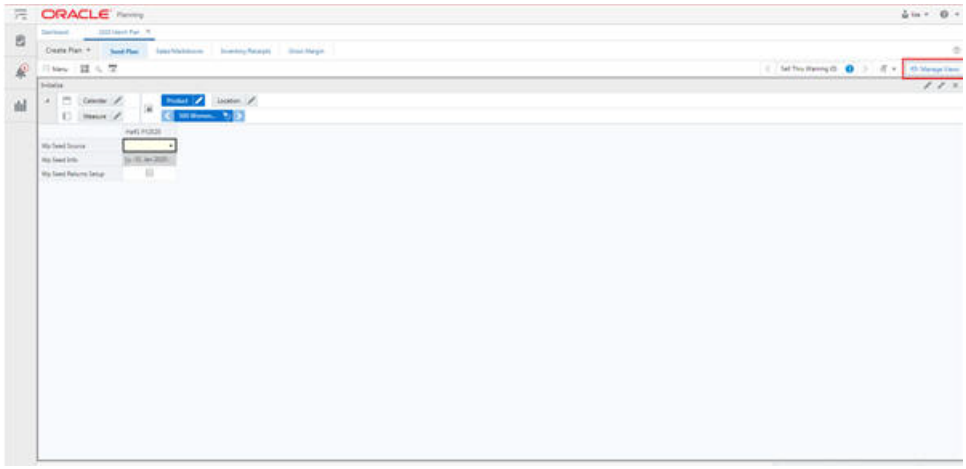


Figure 2–19 View Management Drawer: Hidden



Content Area

The content area appears on the center of your screen and includes the views associated with each step within the business workflow. It provides a spreadsheet-like view or a chart type view that display multidimensional data selected at the dimension levels in Edit view. Each view includes a set of measures relevant to the step that help you view, analyze information, and make decisions.

Figure 2–20 shows the various components in the content area.

Figure 2–20 Content Area

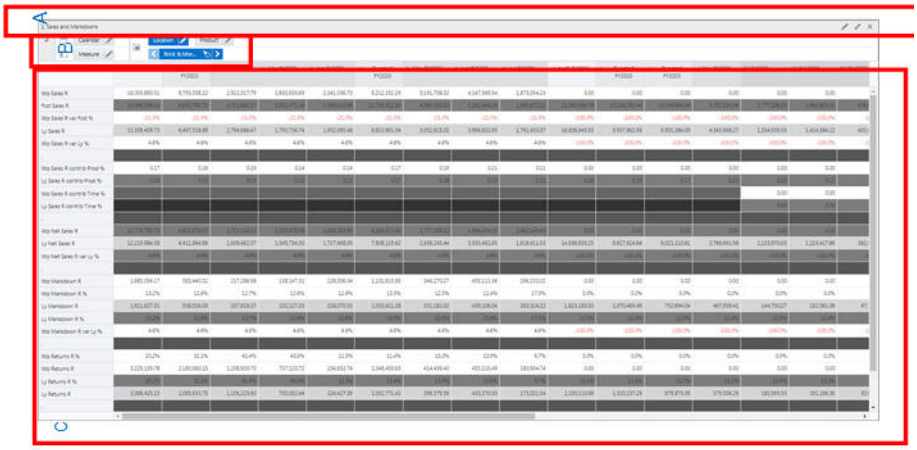


Table 2–6 describes the Content area.

Table 2–6 Content Area

Legend	Area	Description
A	View Title Bar	Displays the name of the view and includes view-level features such as Edit, Expand, and Close View Options.
B	Page Edge and Dimension Tiles Area	Use to move or swap individual dimensions to view the information in a more effective manner. See Page Edge and Dimension Tiles Area.
C	View Area	Displays the data either in a pivot table view or a graphical view with the help of different chart types. The data represented here is at the dimension levels and axes selected in the Page Edge and Dimension Tiles area.

Page Edge and Dimension Tiles Area

This area displays all the dimensions involved in the view. The information in the view is organized based on the dimension positions set up at the page edge, row, and column axes.

The RPASCE Client is designed to help you to work with the easy selection of dimension levels within the Edit view. You can 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 and measure profiles and showing or hiding measures. You can view the information at a low level of detail or aggregate to view the information at summary levels.

Figure 2–21 Page Edge and Dimension Tiles Area

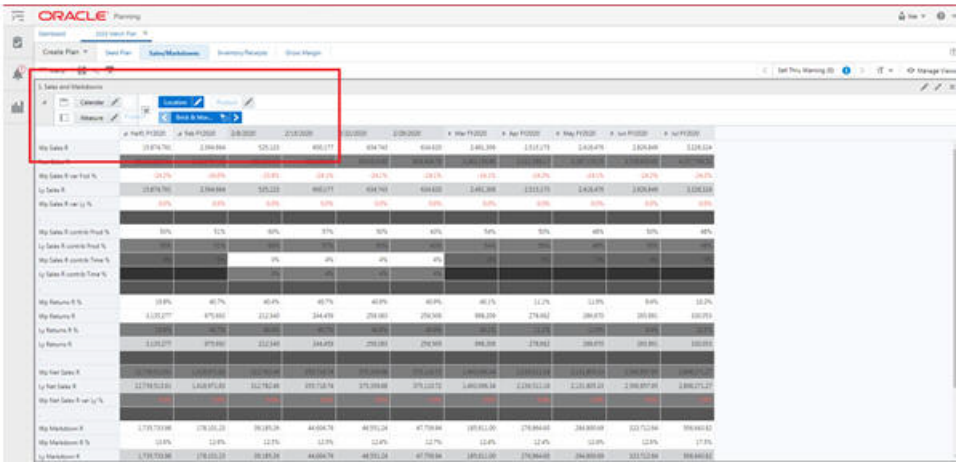
Pivoting and Rotating Dimensions

In the View area, you can rotate or pivot the dimensions across the axes to display data in different orientations. You can pivot the dimensions in two ways.

- **Dimension Move:** Moves a dimensional layer to another position on an axis.
- **Dimension Swap:** Swaps a dimension with another dimension on the axis.

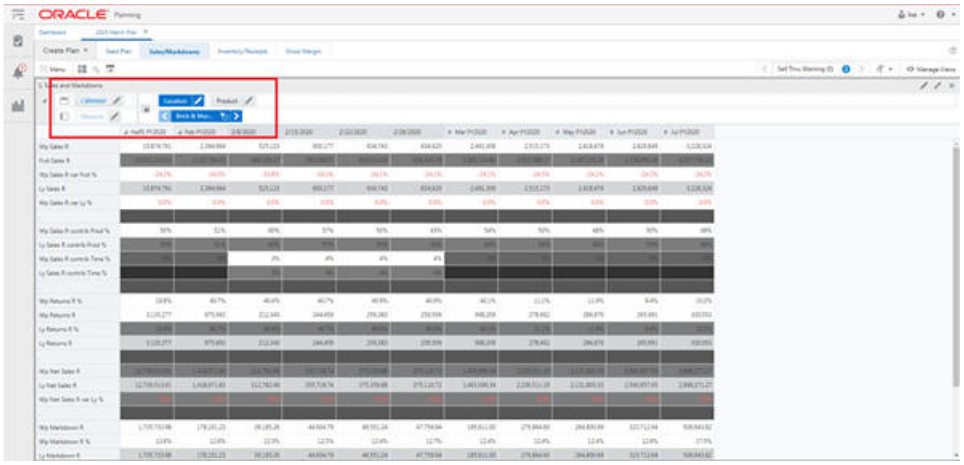
To perform a dimension move, in the Dimension Tile Area click and hold the dimension tile you want to move. Then, drag the tile next to the area you want and release the mouse.

Figure 2–22 Dimension Move



To perform a dimension swap, in the Dimension Tile Area, click and hold the dimension tile you want to move. Then, drag the dimension tile over the one you want to swap it with and release the mouse.

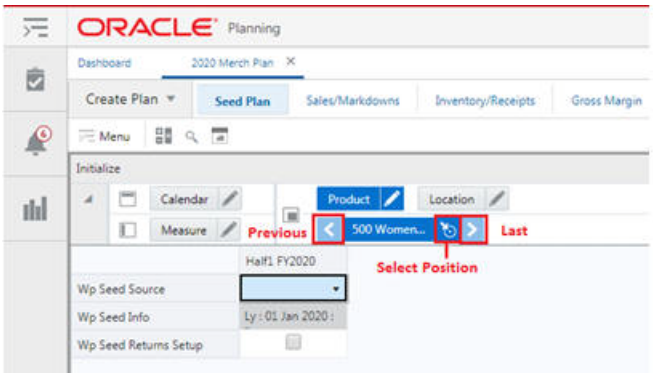
Figure 2–23 Dimension Swap



Paging and Position Navigation

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

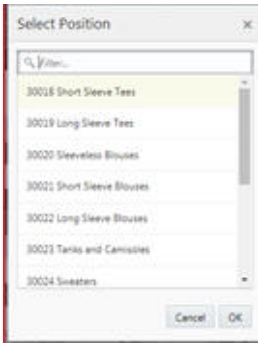
Figure 2–24 Position Navigation



Use the **Previous** and **Next** icons to navigate to the previous and next position in the level that is selected. The position to which you navigate 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.

The **Select Position** icon opens a Select Position popup, which you can use to directly select the required position from the available list of positions.

Figure 2–25 Select Position



Edit View

Using the Edit View dialog box, you can change the way data is presented to you by moving and reordering the dimension tiles, selecting the dimension levels for the data rollups, and selecting the measure profiles.

Synchronize Z Axis Scrolling

Synchronized Z Axis scrolling lets you simultaneously scroll through the *z* axis of multiple views. When Synchronized Z Axis 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 scrolling is disabled, scrolling through slice positions in one view does not affect the slice position display of other views.

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

To enable synchronized Z Axis scrolling, click **Synchronize Z Axis** in the *z* axis and Dimension Tiles area, as shown in Figure 2–27.

Figure 2–26 Before Synchronizing Page Edge

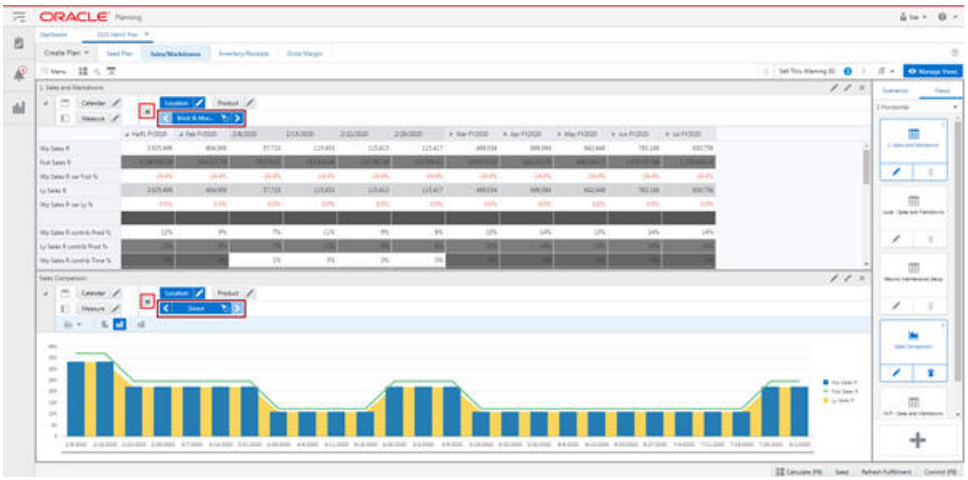
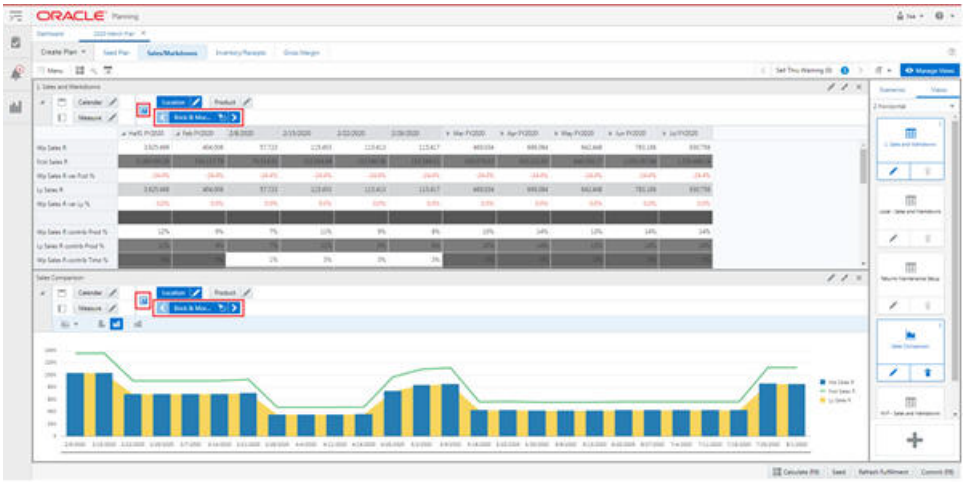


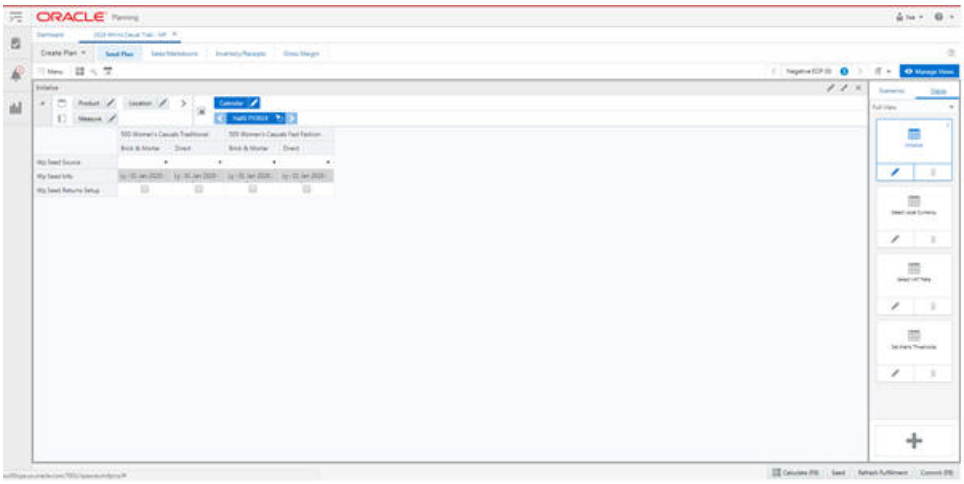
Figure 2–27 Enabling Synchronize Z-Axis



View Management Drawer

The View Management Drawer shows the different views available for the tasks and steps. You can drag an existing view into the Content area to activate that view. You can choose to display one, two horizontal, two vertical, or four views at one time to view in the content area. You can also click **Plus** to create a new view, modify an existing view, or delete an existing view.

Figure 2–28 View Management Drawer



Action Tray

The Action Tray includes Application Actions and System Actions. Application actions are specific to different applications configured in RPASCE. System actions are common across all the views, irrespective of the application.

Examples of Application Actions include Seed, Refresh Fulfillment, Submit Plan, Approve Plan, Copy Approved Plan, and so on in MFP R CS and Seed Sales, Calculate What-If, Copy Linked Items, Flow Receipts, Approve Plan, and so on in IP CS. Application Actions are highlighted in red in Figure 2–29 and Figure 2–30.

The System Actions include Calculate, and Commit. System Actions are highlighted in green in Figure 2–29 and Figure 2–30. As you can see, they are common across different applications, in this example across both MFP R CS and IP CS.

Figure 2–29 Example of Application Actions and System Actions in MFP R CS

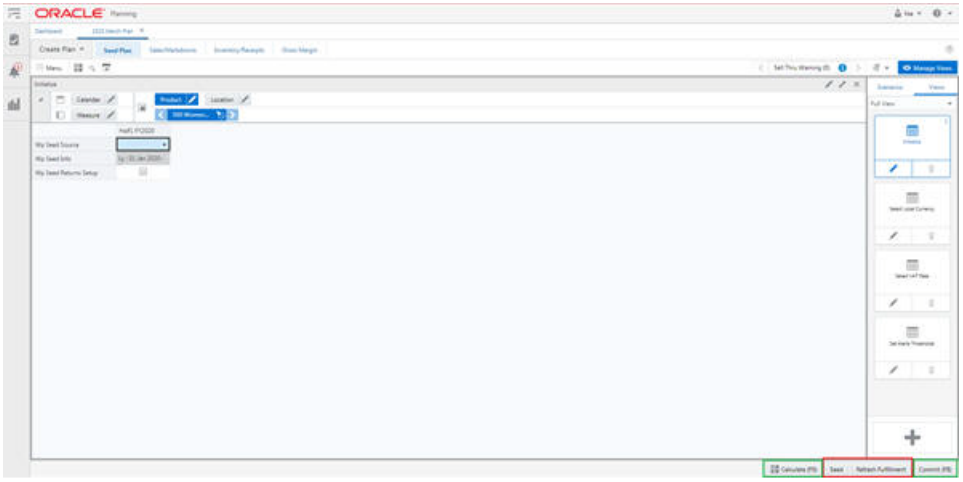
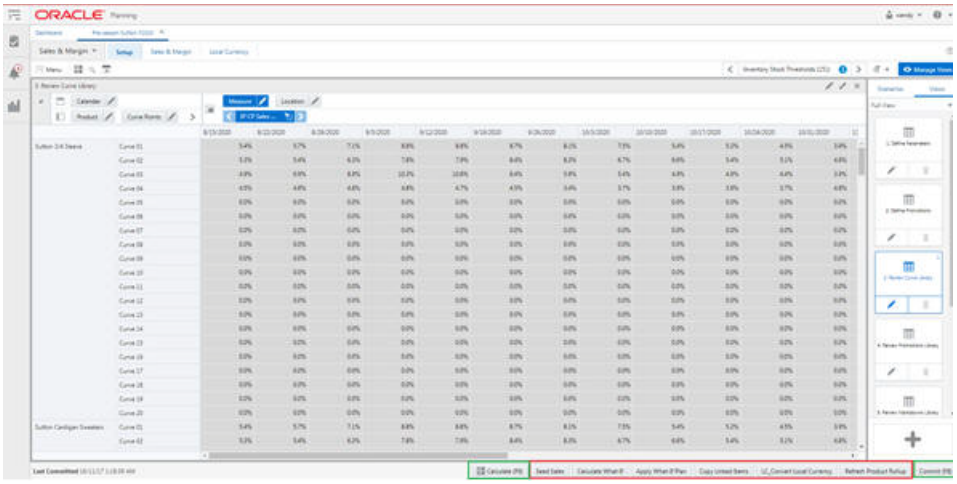


Figure 2–30 Example of Application Actions and System Actions in IP CS



3

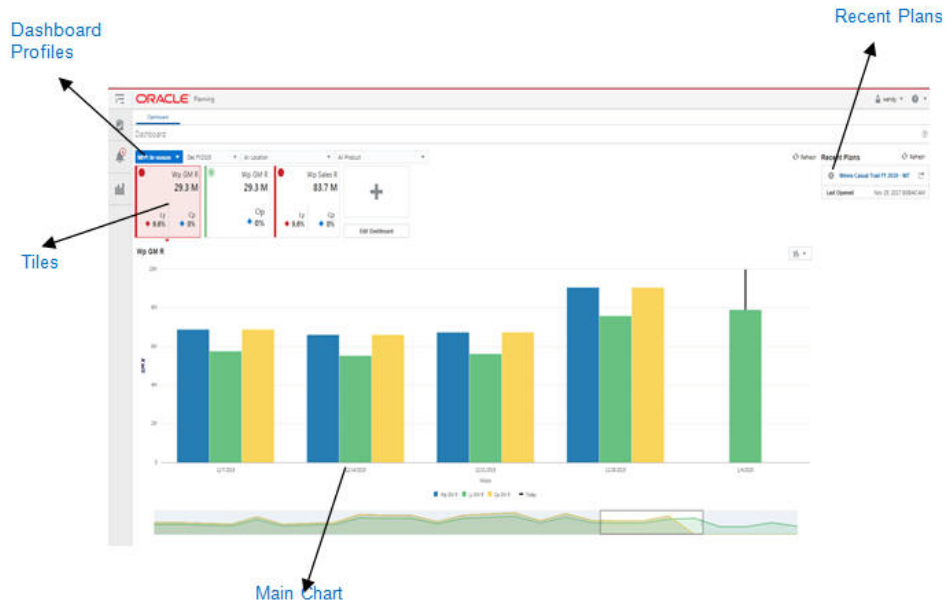
Dashboards

The RPASCE Dashboard is the central page of any RPASCE-based product. It is the first page that you see after logging into the application. It can be used to locate issues that need attention. It can also be used for data analysis, allowing you to examine your data at any scale and for any time frame. In addition, the dashboard can be used to open your most recently used workspaces with a single click.

The dashboard must be refreshed periodically, as new products, locations, and so on, are added. This typically happens weekly, but depends on the nature of the RPASCE application. Measure information in a dashboard can be refreshed at any time.

Figure 3–1 highlights the different section in the dashboard.

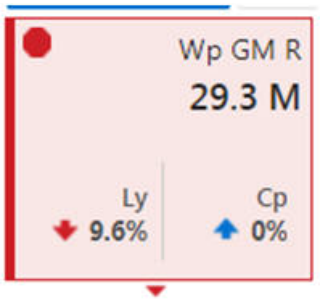
Figure 3–1 Dashboard



Tiles

Dashboard information comes packaged in metric tiles. These tiles are arranged at the top of the dashboard on a carousel (a set of components that can scroll horizontally).

Figure 3–2 Example Metric Tile



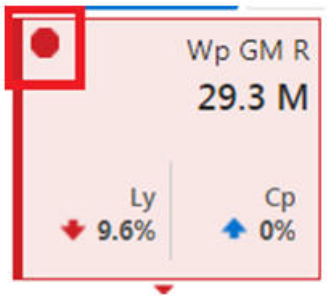
There are several styles of metric tiles. Figure 3–2 represents a variance tile. A variance tile shows the variance between one quantity and two others. Some tiles can represent information. An informational tile just displays the existing measure data.

Every tile has certain common characteristics. For example,

- A title. In Figure 3–1 and Figure 3–2, Wp GM R is the title.
- An aggregate quantity. In Figure 3–1 and Figure 3–2, 29.3 (Million) and 9.6% and 0%. This number reflects the filter selections.
- A color state and icon. In Figure 3–1 and Figure 3–2, Wp GM R is shown in a red octagon (indicating a problem) because the working plan value is 9.6% below the Last Year value.

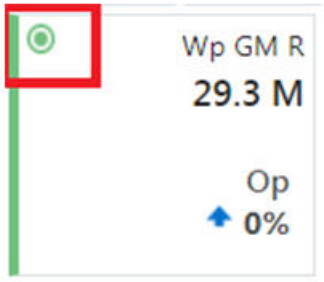
  The colors indicate the following states: red = critical, yellow = important, green = normal, blue = no severity, and grey = administration.

Figure 3–3 Tile Showing Color State and Icon



- An informational tile, shown in Figure 3–4, is always green (indicating no problem) because it is simply shows the measure.

Figure 3–4 Informational Tile

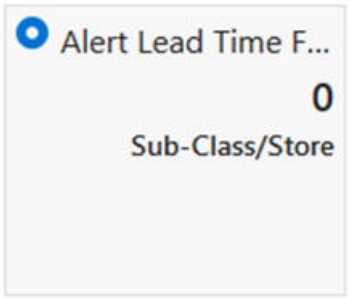


- A yellow triangle tile, shown in Figure 3–5, represents an exception with Important Severity.

Figure 3–5 Yellow Triangle Tile Representing Important Severity

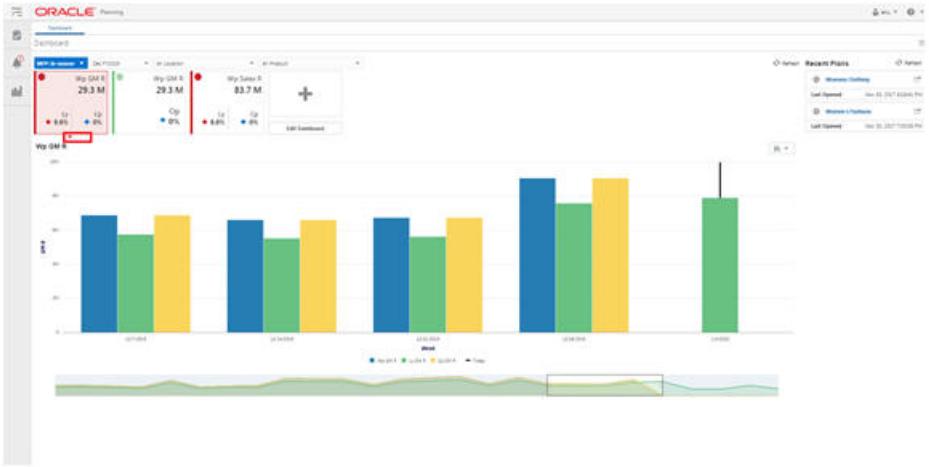
- A Blue Circle tile, shown in Figure 3–6, represents an exception with No Severity.

Figure 3–6 Blue Circle Tile Representing No Severity



The arrow beneath a tile, shown in Figure 3–7, indicates that this measure is displayed in the chart area in more detail. Clicking on a different tile refreshes the data in the chart area and places the arrow under the clicked tile.

Figure 3–7 Variance Tile

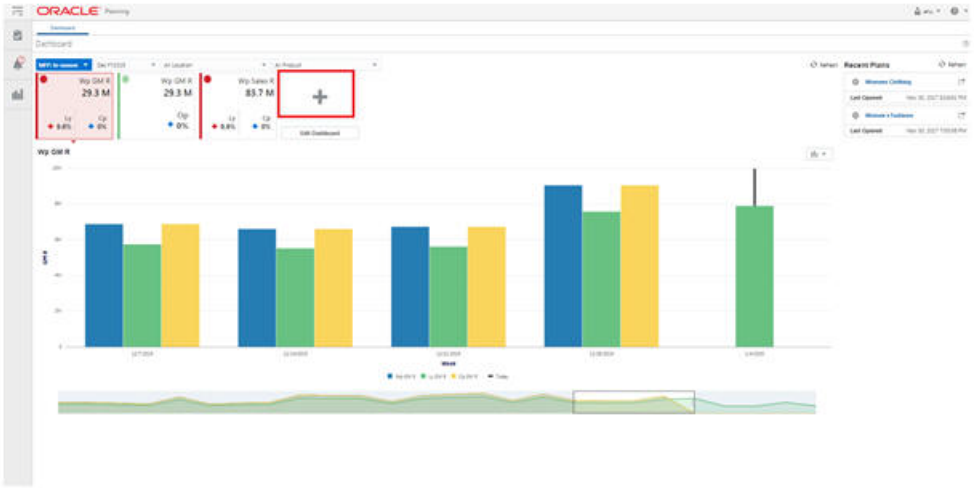


Metric tiles must represent the basic quantities that are used to indicate the health of your business. An implementer can create new metric tiles, modify existing ones, or delete tiles entirely.

Adding a New Tile

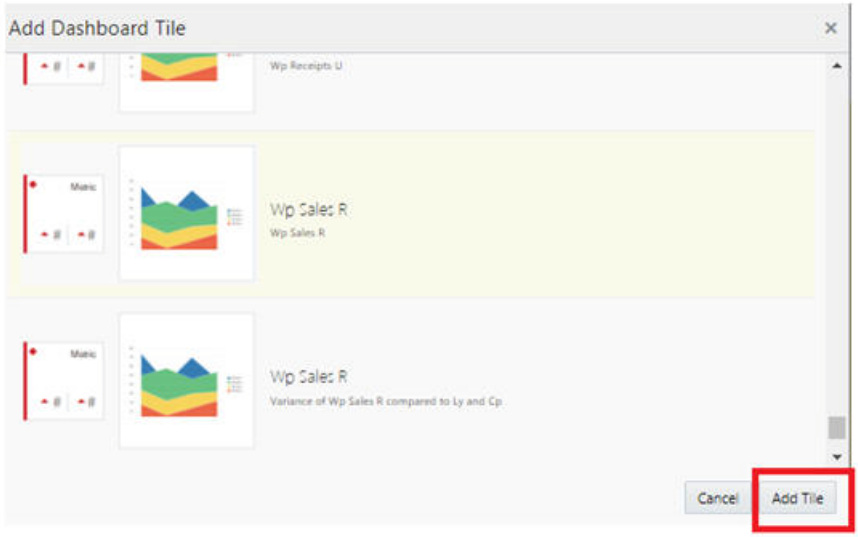
You can add a metric tile from an existing pool of tiles. To add a new tile, click **Plus** on the right hand side of the metric tile carousel (some scrolling may be required).

Figure 3–8 Add New Tile



This brings up a dialog box showing all available metric tiles. Click the desired tile and click **OK**. The tile is added to your tile carousel.

Figure 3–9 Available Metric Tiles

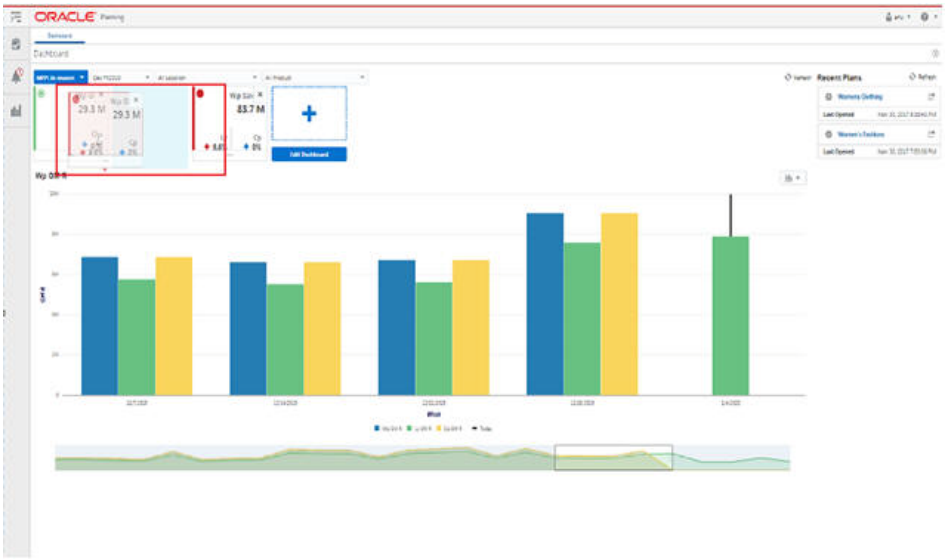


Changing the Display Order

You can change the order in which tiles are displayed. To do this, the metric tile carousel must be in edit mode. To access edit mode, click **Edit Dashboard** under the

Plus icon to the far right of the carousel. Once in edit mode, each tile displays a drag bar at the bottom of the tile. You can drag the tile to the place you want it on the carousel and drop it.

Figure 3–10 Changing the Display Order

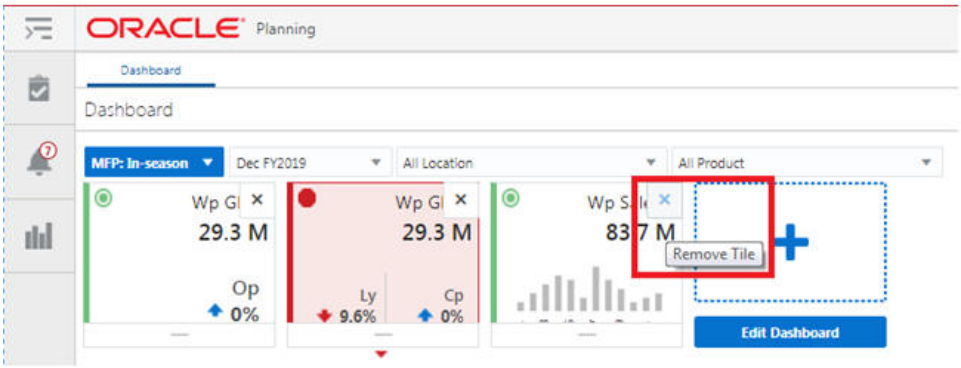


Removing a Tile

To remove a tile, enter edit mode by clicking the **Edit Dashboard**. In addition to the drag bar, each tile also displays a Delete icon in the upper right corner. Click **Delete** to remove the measure. Note that the measure can still be added from the metric tile pool.

All changes to the metric tile carousel are automatically remembered by RPASCE. The system remembers the desired order and content until you change it.

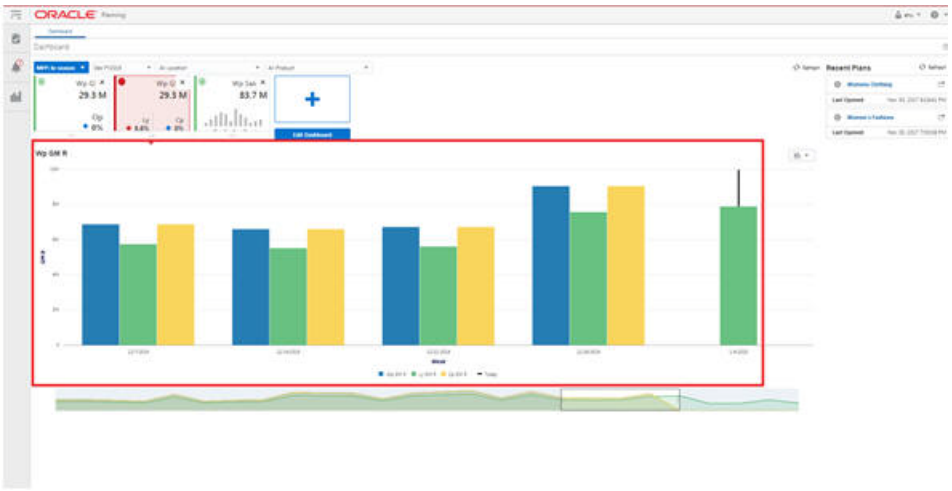
Figure 3–11 Removing a Tile



Main Chart

Selecting a tile displays detailed information for the measures represented by the tile in the main chart area. The information is presented with time on the horizontal axis and the measure quantity on the vertical axis.

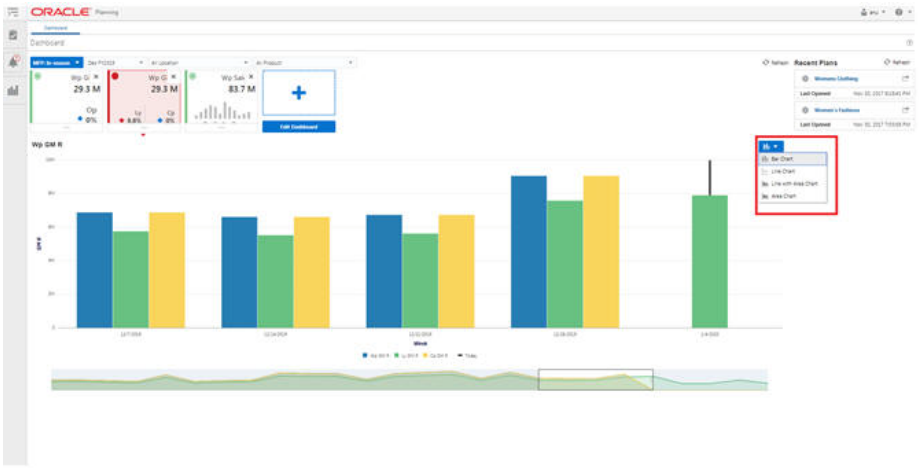
Figure 3–12 Main Chart



Modifying the Chart Type

Click **Chart** to display the List of values that show the allowed chart types that you can select and view in the specific chart view.

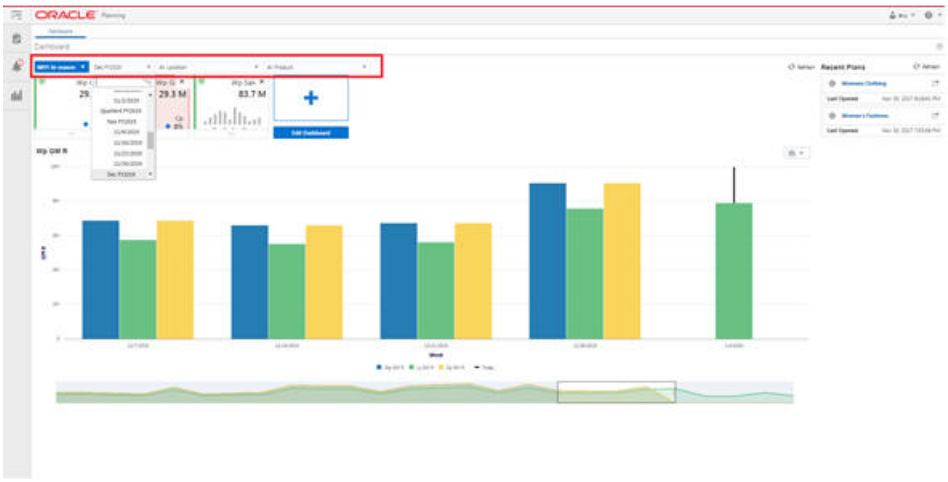
Figure 3–13 Modifying the Chart Type



Filters

You can change the positions shown for each dimension by making selections in the filters at the top of the screen above the metric tiles.

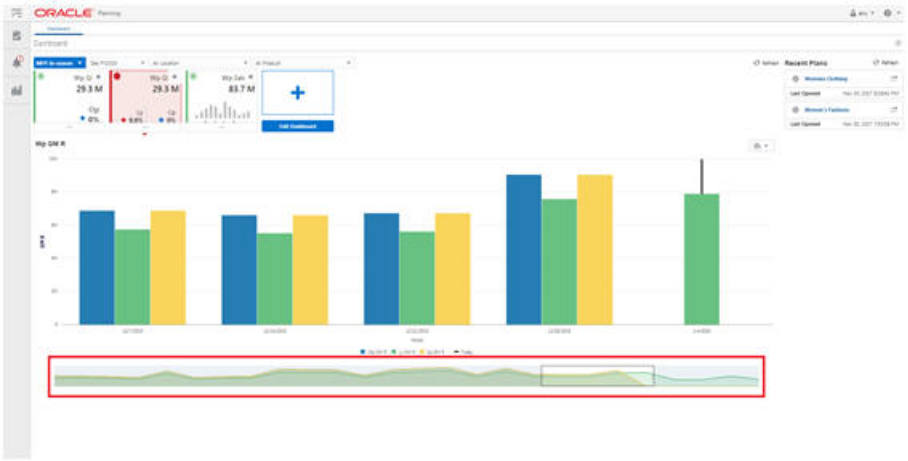
Figure 3–14 Filters



Time Horizon

You can change the time horizon used to calculate each metric tile by changing the time horizon at the bottom of the screen. You can drag the start and end dates to impact the calculations.

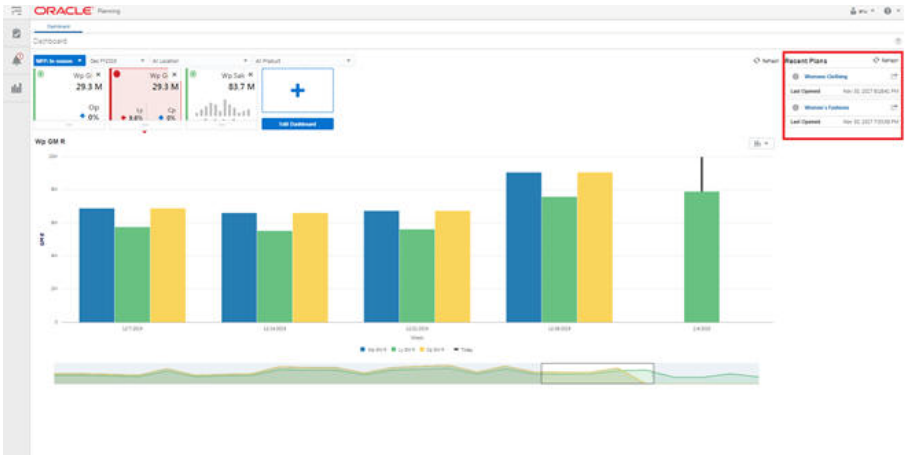
Figure 3–15 Time Horizon



Recent Plans

You can view and select from a list of most recently visited workspaces by choosing a workspace from the Recent Plan/Workspaces section in the top right of the screen. This does not list all available workspaces, only the most recent. Use **Refresh** to update the list with the most recent plans.

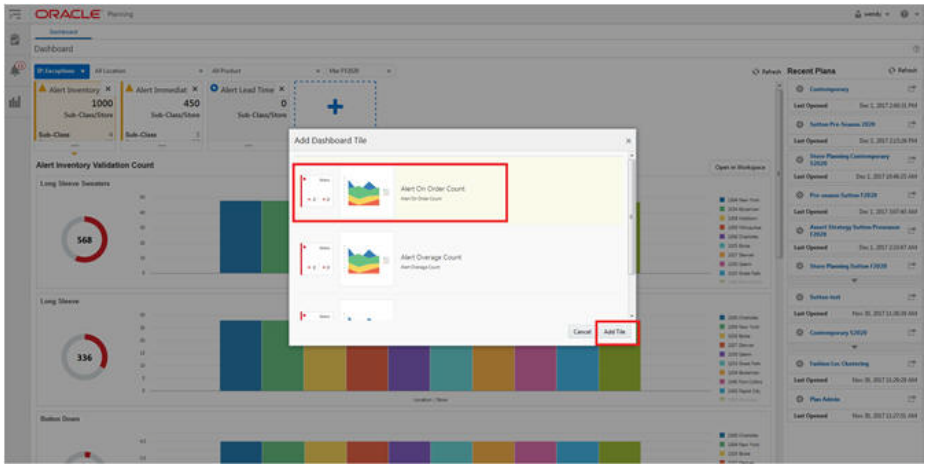
Figure 3–16 Recent Plans



Exception Dashboard

As a planner, you may want to see information about exceptions. You can select the Exception profile in the dashboard to add all the exceptions defined for the application as the Exception dashboard tiles. These exception dashboard tiles provide you with a quick summary of the exception hits. You can view the recent plans and refresh the dashboard.

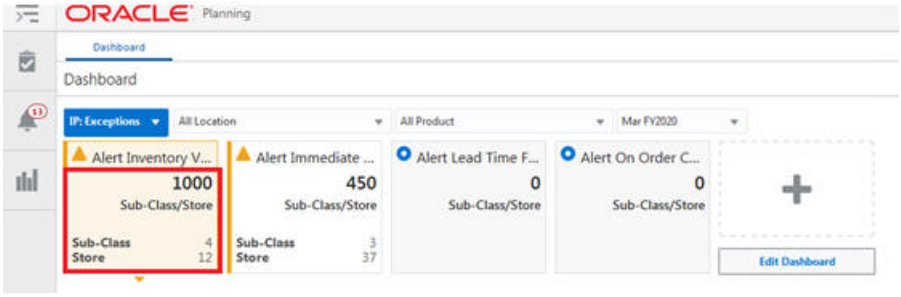
Figure 3–17 Exception Dashboard



Exception tiles provide a summary of how many exceptional conditions exist within the plans you created and provide secondary information describing roughly the distribution of the exceptions across the data segments.

As shown in Figure 3–18, the selected alert has total of 1000 exceptions at four different subclasses. In the detail section under Alert Inventory Validation Count you can see four different graphs, one for each subclass with locations as the legend.

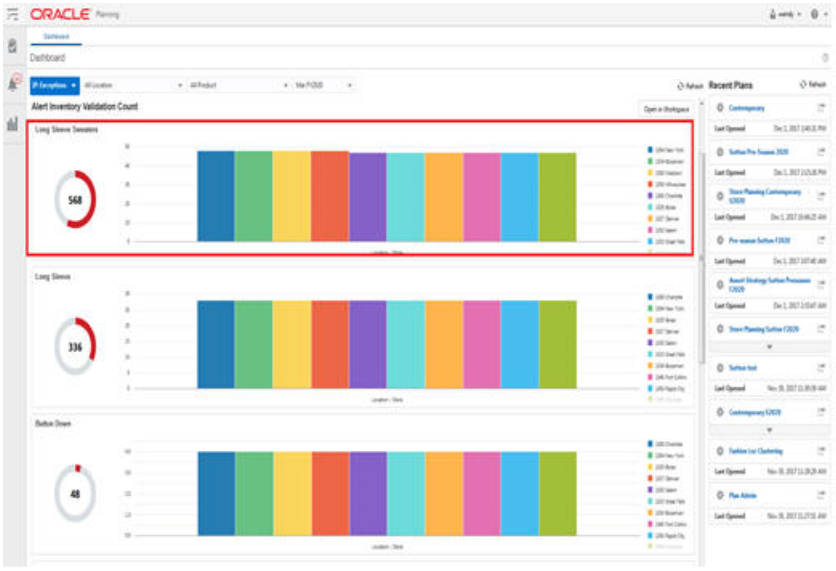
Figure 3–18 Exception Tile Summary



The detail pane associated with an Exception Tile provide a more granular description of the location of exceptions and leverages dashboard filtering to allow you to direct the sequence in which to visit the exceptions.

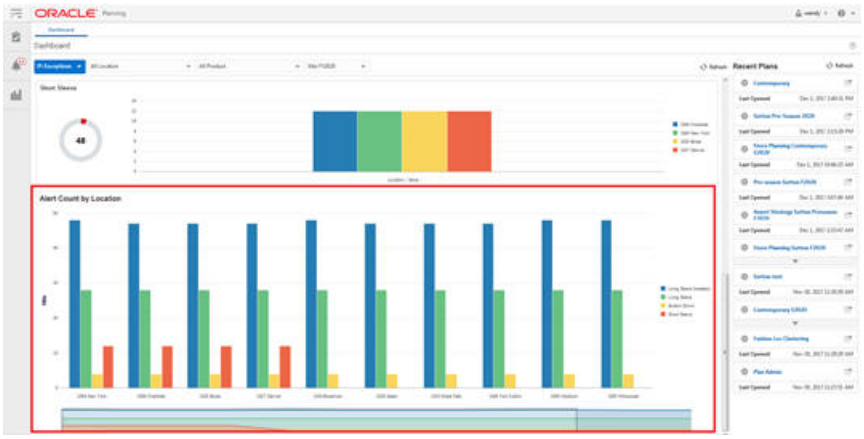
In Figure 3–19, the Long Sleeve Sweaters subclass has 568 exceptions across several location that are displayed in the graph legend.

Figure 3–19 Example Sweater Exceptions



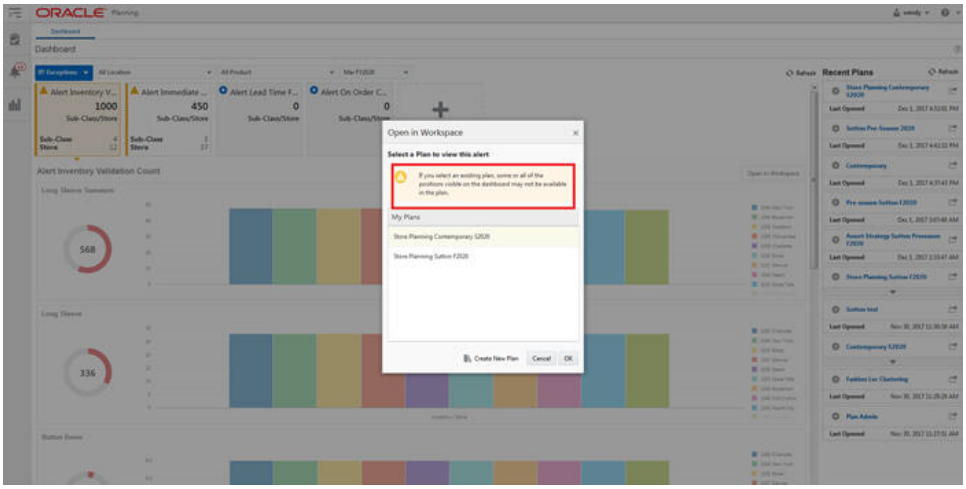
As shown in Figure 3–20, the selected alert has total 1000 exceptions at 12 different locations. You can see in the detail section graph for Alert Count by Location with legend as the subclass.

Figure 3–20 Example Exception Summary



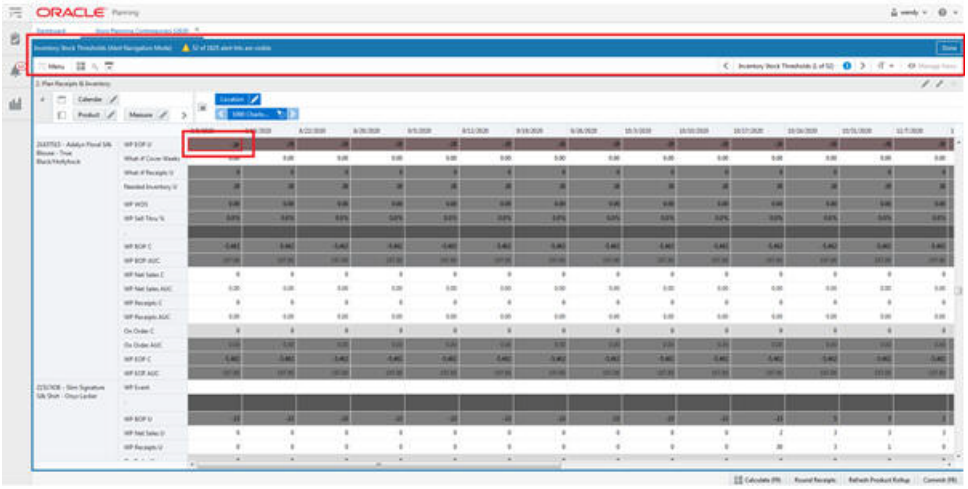
You can also contextually launch the workspaces with the selected alert. By clicking **Open in Workspace** you can open an existing segment in alert navigation mode.

Figure 3–21 Select Alert



The selected workspace is launched in alert navigation mode to guide you through the alerts in order to resolve the exceptions one by one. See Chapter 12, "Real Time Alerts" for more information on alert navigation.

Figure 3–22 Resolve Exceptions



4

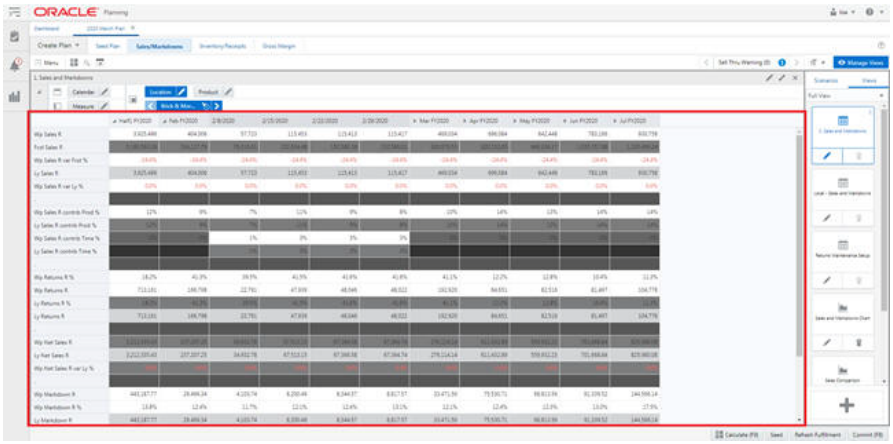
Workspaces

When you use an RPASCE solution, you can interact with the solution through a personal data repository called a workspace. A workspace contains a segment of the data (and metadata) from the domain, and its scope is constrained by the access rights available to you. Workspaces are stored on the RPASCE server and can be built using an online wizard process or via an automatic batch process.

Pivot Table

When you are working with a workspace, the pivot table is the main area that displays the data in rows and columns.

Figure 4–1 Pivot Table



Sorting and Filtering

Sorting and finding data is essential when working with workspaces that contain thousands of items and hundreds of locations across calendar periods. Being able to put this data in a logical order or find a specific piece of information is what makes planning possible.

Sorting

You can sort positions in a level by using the arrows that appear on column headers or by right clicking on a cell to open the context menu. The positions are sorted based on the values of a measure's slice for that level.

The sorting occurs along a single measure, using only a single level in the sort. The sorting is limited to the current view, so you can see the same data sorted differently in different views. Sorting is only available in the pivot table, not the graph view.

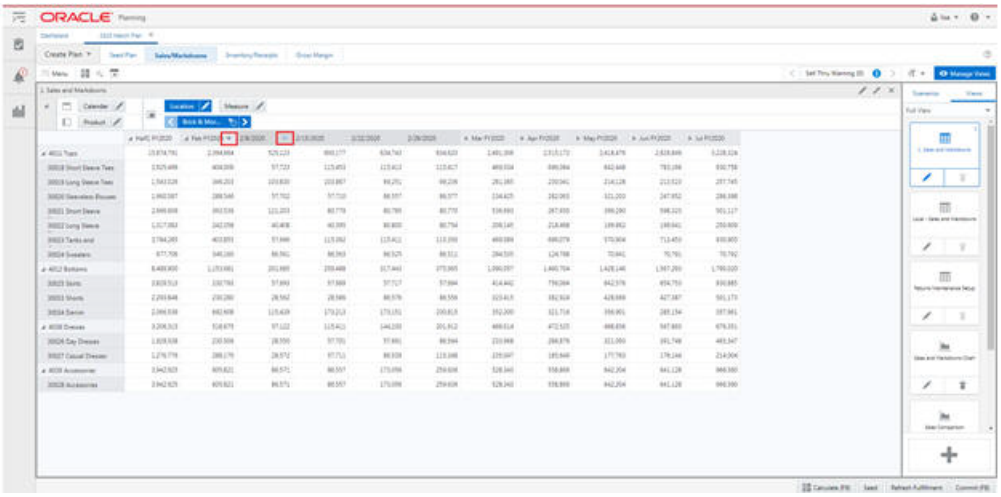
Note: A slice is valid if it involves only one measure and if it has a unique value for each position along the level being sorted (that is, one position along all other dimensions in the measure's intersection has been selected).

Simple sorting 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.

Sorting by Column Heading

To sort by the column heading, hover the mouse pointer over a column header of the desired valid slice of measure data to enable the sort arrow and click the arrow.

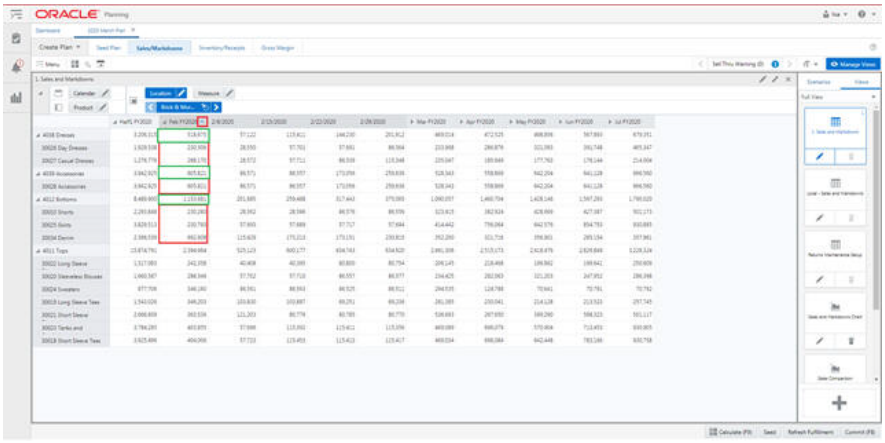
Figure 4–2 Sort by Column Heading



Once you click the sort arrow, the selected positions are sorted according to the measure's values in the selected slice. The arrow sorts in ascending order the first time you click it, then in descending order on the next click; it switches back and forth for each new click. The arrow displayed in the column header shows the current sort order.

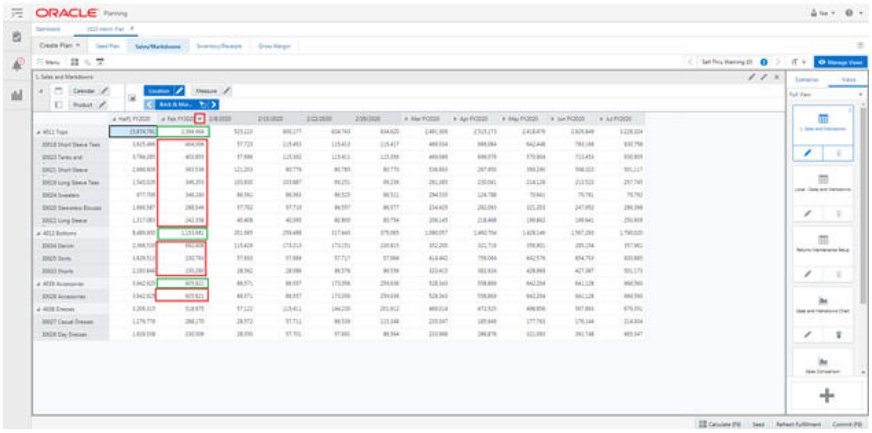
An ascending sort orders the data so that the lowest number appears at the top of the list and the highest number appears at the bottom of the list.

Figure 4–3 Ascending Order



A descending sort orders the data so that the highest number appears at the top of the list and the lowest number appears at the bottom of the list.

Figure 4–4 Descending Order

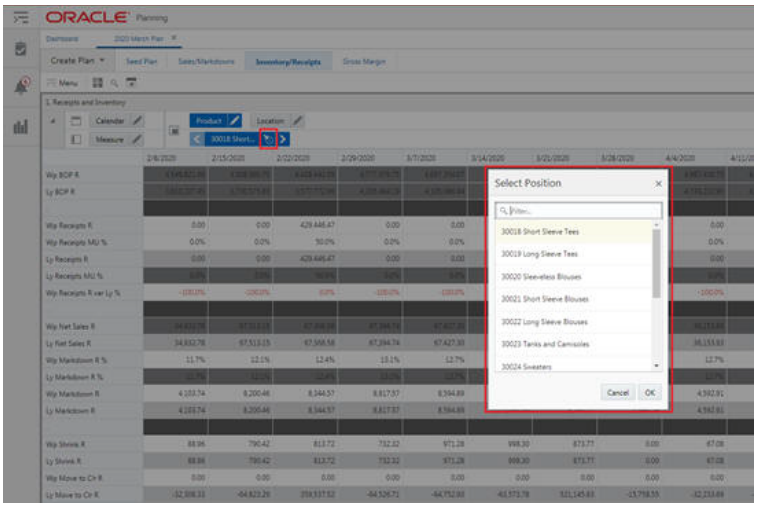


Select Position

In the *z* axis, you can use the **Select Position** button to find a position instead of scrolling to the desired position.

Click the dimension tile you want to be active for the Select Position action. In this example, you can choose from Location or Product. Whichever dimension is selected, Select Position will open for that dimension.

Figure 4–5 Active Dimension (Product)

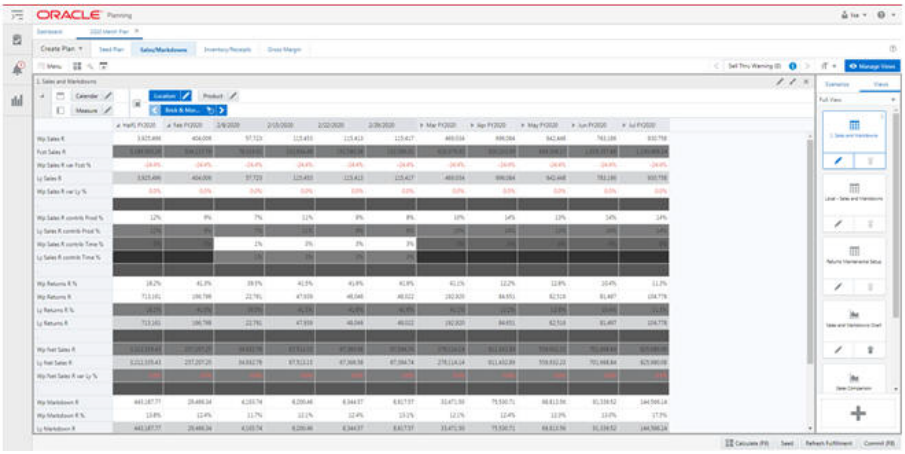


Z Axis

The *z* axis appears at the top of the View area and displays the dimensions on the *z* axis according to its current position in the dimension. You can scroll through the positions on the *z* axis to move through the data you are viewing in the *x* and *y* axes in the pivot table. If more than one dimension is on the *z* axis, you can select the active dimension to scroll through.

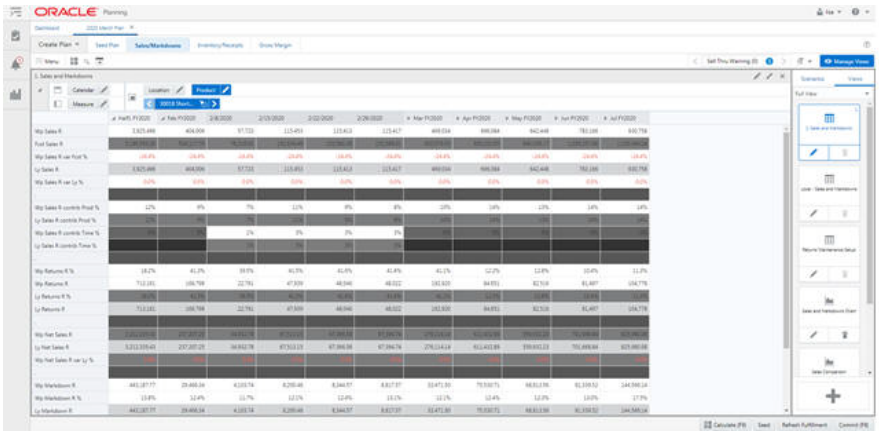
In this example, Location and Product are on the *z* axis, and Location is the active dimension, so the current Location position is displayed.

Figure 4–6 Location Z Axis



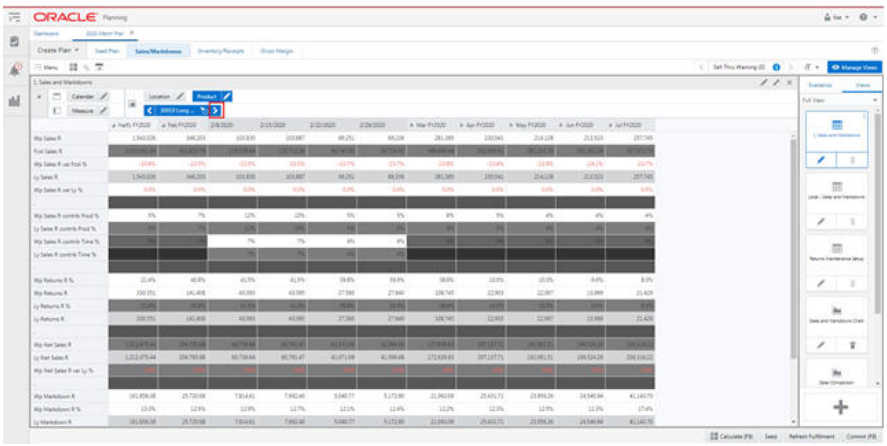
Select the Product dimension to make it active; the current product position is displayed.

Figure 4–7 Product Z Axis



Select the dimension you want to be active and use the scroll buttons to scroll through that dimension only. In this example, clicking the **Next** button will advance to the next product, but the location position will not change. Note that you must click on the Location dimension tile to see the current location position.

Figure 4–8 Next



Find

Use the find feature to search for words, partial words, or phrases within the row headers and column headers of the visible views containing pivot tables. The search does not include the data cells within the view. The search does not include positions or measures on the *z*-axis.

The find feature locates the phrase you are looking for, and the color of the phrase changes to pale blue. If the matched position is not visible because it is hidden under a scroll bar, the view is automatically scrolled to reveal it. The find does not match collapsed or hidden positions.

The find feature can be accessible in the following ways:

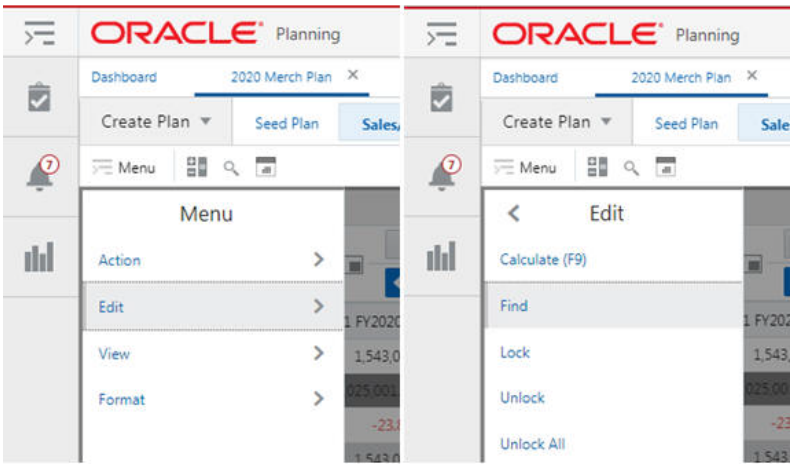
- The Find option in the Edit sub-menu of the Quick Access Toolbar menu
- The shortcut Ctrl + Shift + F from a selected pivot table cell
- The Find button on the Quick Access Toolbar

Using Find via the Quick Access Toolbar Menu

To use Find via the Quick Access Toolbar menu:

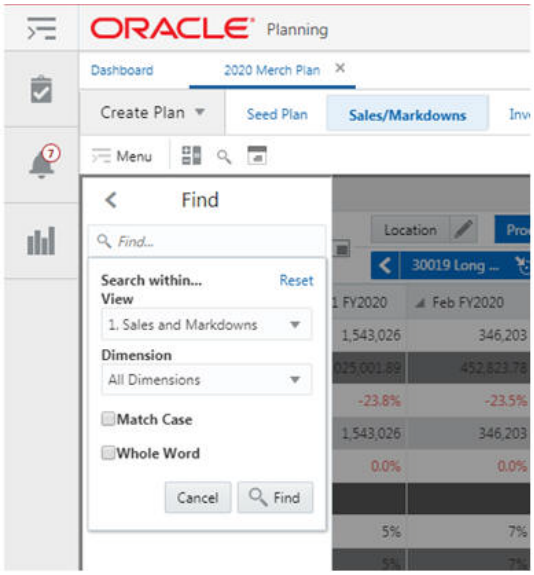
1. Click **Menu** to slide in the Main Menu .
2. Click **Edit**.
3. Click **Find**.

Figure 4–9 Find Using the Quick Access Toolbar Menu



4. The Find panel replaces the content area of the Main Menu.

Figure 4–10 Find Panel

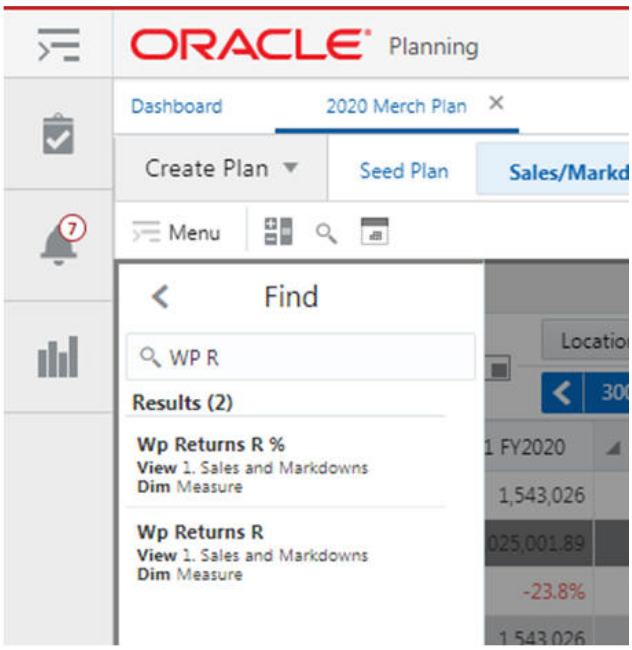


5. Enter the following criteria:
   - Enter the characters to search for in the Find input field.
   - If more than once view is visible, select a specific view in which to perform the search. By default, the most recently selected view is chosen, but an All Views option is available from the View drop-down list. If All Views is chosen, the views are searched from upper left to lower right.

- Narrow the search to a particular dimension using the Dimension drop-down list. The default is to search all dimensions. Only dimensions on the *x*-axis or *y*-axis are listed.
- Select **Match Case** to make the search case sensitive. Leave it unselected if you want the search to find all text that matches your text, regardless of case.
- Select **Whole Word** to search for and find the text in a whole word rather than a partial one. For example, if you are searching for the letter R and you select the Whole Word option, then the search will find the Ly Net Sales R measure, but it will not find the letter R within the Ly GMROI% measure.

6. When finished, click **Find**.
7. Any matching results are displayed in a scrolling list below the Find input field. Results are grouped by view, with the upper-most and left-most view results first. Each result includes the measure or position label that was matched as well as the view and dimension of the match. Find results are capped at 250 matches. If there are more matches, you may need to modify your search criteria to narrow your search.
8. Click one of the results.

Figure 4–11 Find Results



9. The menu and the Find panel close and the matching header scrolls into view in the appropriate view.

Modifying Find Criteria

To return to the Find panel, click **Main Menu**. If the Find panel was the most recently selected menu item, the Find panel will be displayed with any previously found results. If not, you can navigate via the Edit menu item. Click in the Find input field and the search criteria is displayed. Modify any find criteria and click **Find**; the new results are displayed.

Click **Reset** to return the Find panel criteria to the default state. Click **Cancel** to close the Find panel. Clicking outside the Find Panel causes it to close.

Find Limitations

Find does not consider *z*-axis positions. However, clicking **Position Tile** on a *z*-axis position launches a pop-up of all positions and measures that can be selected, so you can find a particular position if the dimension and level are known.

Measures

Measures represent the events or measurements that are recorded; 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.

Measures that appear in the view are based on the configuration, and only measures configured for a view are visible in the view. You can show, hide, or reorder the measures using Edit Measure. See Chapter 7, "Editing Views" section "Showing, Hiding, and Reordering Measures".

Cells

Your ability to edit multiple workbook cells at once and to move chunks of data in and out of the workbook is essential to using RPASCE efficiently and effectively. This section describes how to select and edit cells as well as how to cut, copy, and paste information into cells. It also provides details about the various tasks you can perform with the data in cells.

Select and Manipulate Cells

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 commands.

Note: Certain cells are read-only to prevent them from being edited. By default, read-only cells are indicated by a gray background. Cells are specified as read-only during configuration. This cannot be changed by the user. For more information, see "Read-Only Measures".

Select a Single Cell

To select a single cell, click inside the cell or use the cursor keys or tab key to move from one cell to another. When selected, the cell becomes shaded and has a black outline.

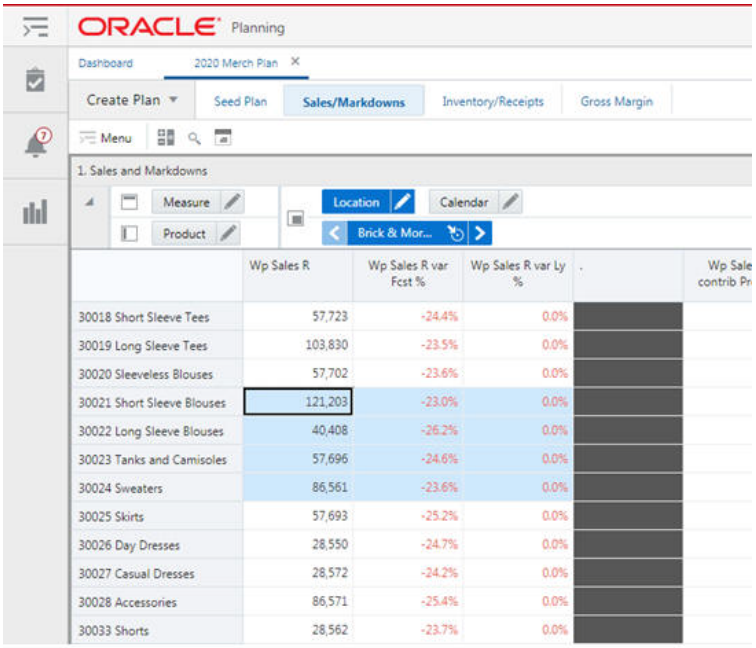
Select a Group of Contiguous Cells

To select a group of contiguous cells, do one of the following:

- Click a starting cell and draw adjacent cells to select them. You can drag within one row or column or across rows and columns to create a block of selected cells.
- Click a cell to select it. Hold the Shift key and use the cursor keys to select adjacent cells.

The selected cells become shaded, while the first cell selected is also outlined in black.

Figure 4–12 Contiguous Cells

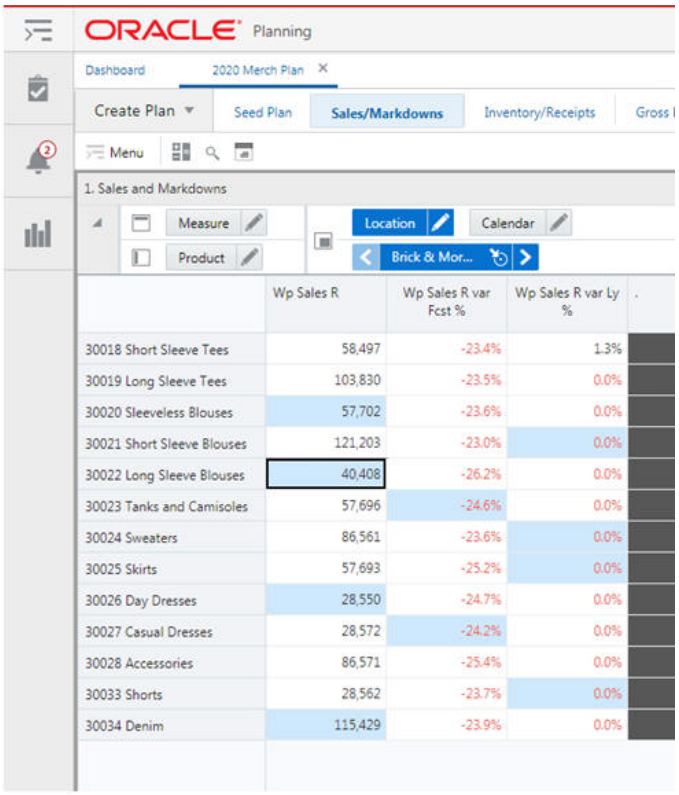


Select a Group of Non-Contiguous Cells

To 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 4–13 Select a Group Non-Contiguous Cells



Navigation Shortcuts for Editing Cells

When you are editing cells in a pivot view, you can use the navigation options listed in Table 4–1 to move to the next cell.

Table 4–1 Navigation Options

Action	Effect
Tab or Keyboard right arrow	Move to next editable cell to right
Shift + Tab or Keyboard left arrow	Move to next editable cell to left
Enter or Keyboard down arrow	Move to next editable cell below
Keyboard Up arrow	Move to next editable cell above

When you use these options, the cell you navigate to opens in editable mode (unless the cell is read-only). To exit editable mode, use the Escape key.

When you navigate to read-only cells or move to and from cells that are not in editable mode, you can use the cursor keys.

Note: Use the Escape key to exit Editable mode and restore the previous value.

Enter or Change Values in a Cell

This section provides descriptions of actions you can take to change individual values in the pivot table.

Note: The type of data that cells can accept is predefined. If you try to enter another type of data into the cell, you will see an error message.

Numbers

You can enter or overwrite a numeric value. Some cells may have constraints on the values that can be entered. If you exceed this limit, you will see an error message.

Alphanumeric Values or Plain Text

You can enter or overwrite an alphanumeric value. Text may be entered up to a maximum value of 4096 characters. Any text string that exceeds this length will be truncated to this value.

Drop-Down List Items

You can select the desired option from the drop-down list. Click the arrow and select an item from the drop-down list.

Check Box (Toggle) Items

You can click the check box to change the status of the item (Yes or No; On or Off).

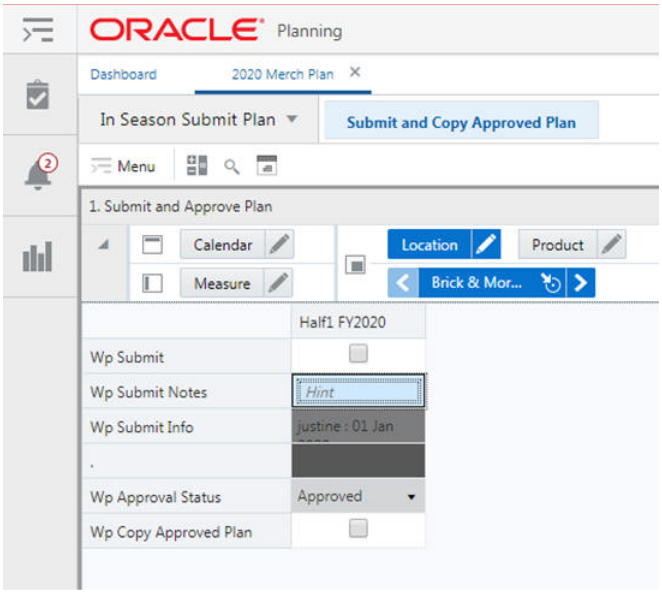
Date and Time Items

You can select the desired date and time. Some measures may be formatted to display only the date. You can only set the time when the date measure is formatted to display time.

Click within the cell to display the Select Date and Time pop-up. Click the appropriate arrow keys to change the year, month, day, hour, minute, second, and AM/PM. (The AM/PM option buttons are available only if the measure has been configured to use the 12-hour format.)

You cannot enter dates or times outside of the lower and upper bounds for the measure.

Figure 4–14 Edit Cell Values



Modify Data with Cell Formulas

You can use cell formulas 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 percent, multiply the value by 1.1 (enter *1.1)

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

In addition to the basic math operations, you can also extend the math operations. 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.

Using Math Formulas

In addition to the basic math operations, you can enter formulae in the cells. For example, entering 10+30/2 in a cell will update the cell with a value 25.

Entering Measure Data Using a Scaling Factor

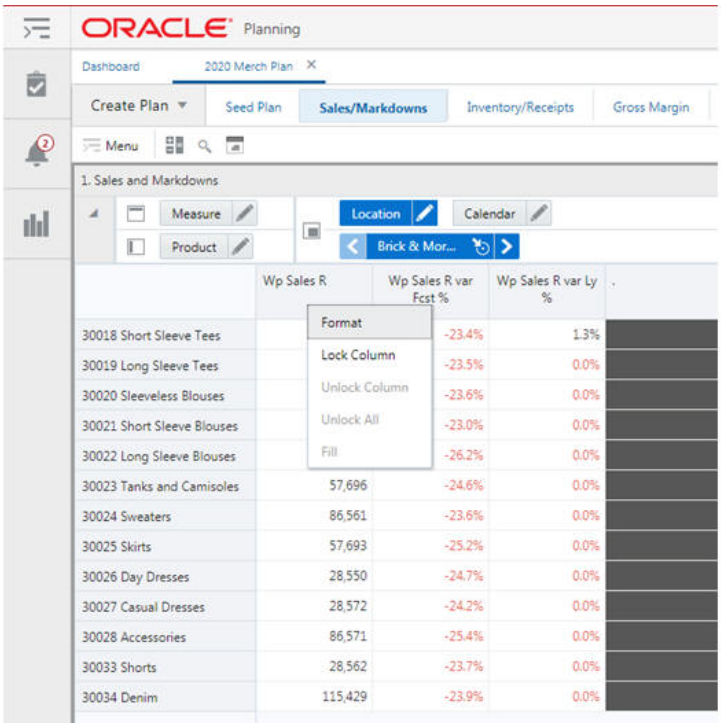
Use the scaling factor feature to enter measure data to be scaled or factored to an internal value that is recognized by the server in data calculations. When you enter a value for a measure that has a scaling factor, the value that you enter is multiplied by the scaling factor to arrive at this internal 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 is 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 are 1000, 2000, and 6000, and these internal values are used in required data calculations. Removing the zeros from the display results in a cleaner, less cumbersome view appearance. Scaling factors can be set in the RPASCE Configuration Tools or through the formatting options in RPASCE. For more information about setting scaling factors in the Configuration Tools, see the Oracle Retail Predictive Application Server Cloud Edition documentation.

To set scaling factors in RPASCE, complete the following steps:

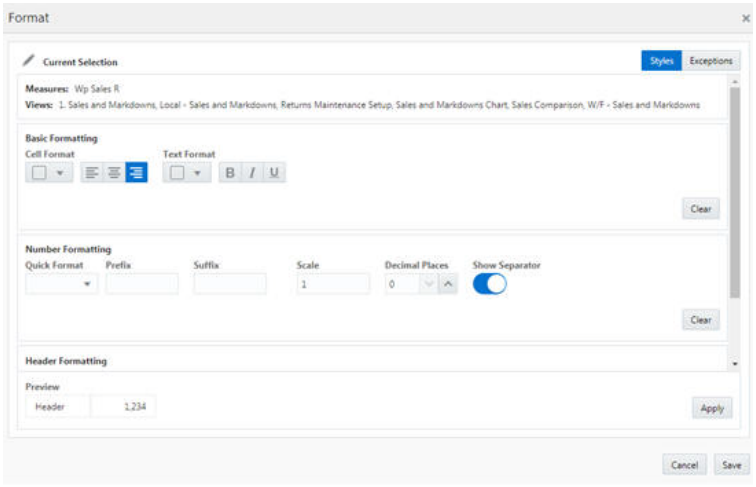
1. Right click the measure header to invoke the contextual menu and select **Format**.

Figure 4–15 Measure Header



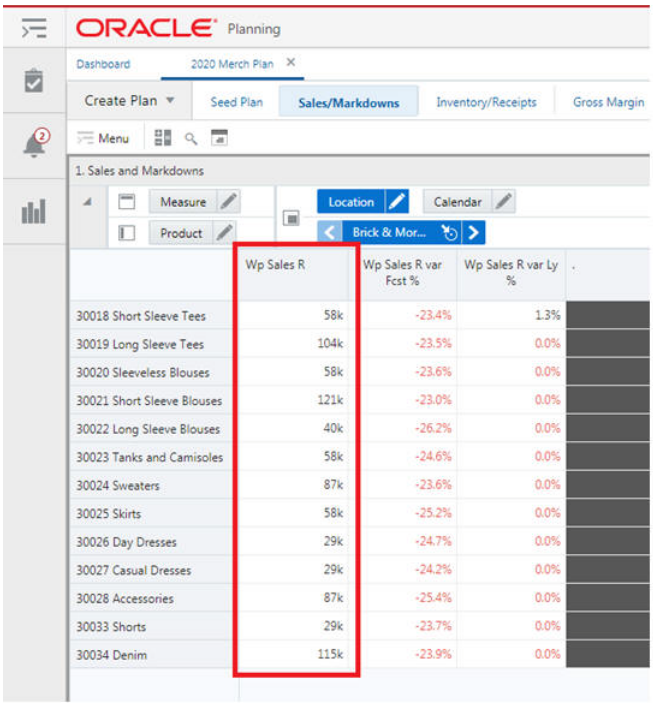
2. The Format window is displayed.
3. In Figure 4–15, the selected measure Wp Sales R is already selected and all the views in the current tab are selected.

Figure 4–16 Format



4. Enter a value in the Scale field. For example, if you enter 1000, the cell value 35 will equal 35,000. You can also add a "k" suffix to help remind you that this is a scaled cell.
5. Click **OK** to apply the change and exit the window. Note that the values are now scaled by the specified scale factor.

Figure 4–17 Scale Factor



You can use the scale factor for percentages as well. Enter a scale of 0.01, if you want to see values displayed as percentages, so that you see 19% rather than 0.19.

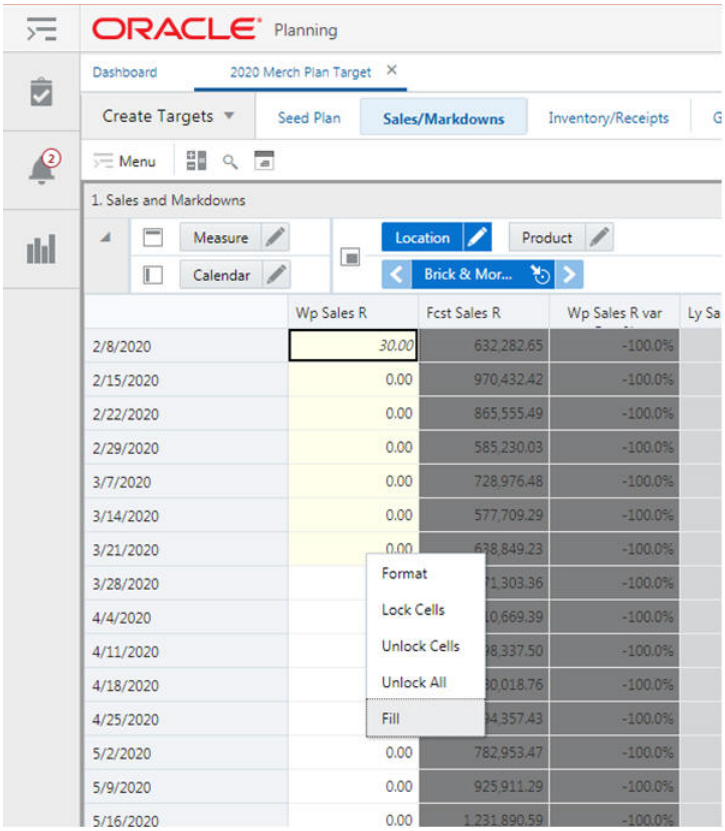
Fill Cells in a View

Your ability to edit multiple workbook cells and to easily move data in and out of the workbooks is essential to using RPASCE to its fullest extent. You can accomplish this by using the fill function. Use the fill feature to quickly populate many cells of a writable measure at a time. Fill is available as a menu item in the right-click context menu.

To fill cells with the same value:

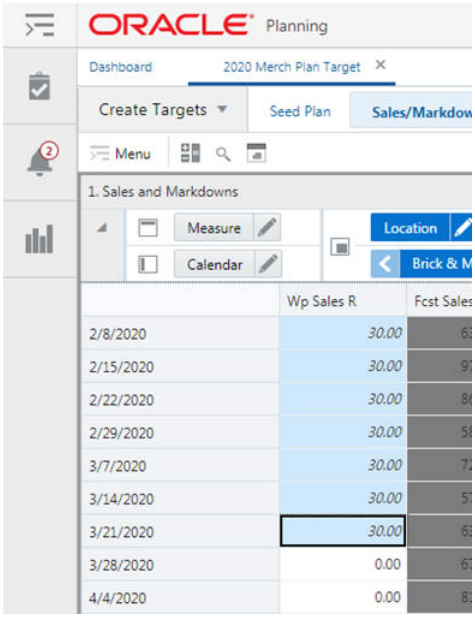
1. Select a source cell whose value you want to repeat in other cells. This must be the upper/left relative to the cells to be filled.
2. Select a continuous block of cells down and to the right from that source cell.
3. Right click one of the selected cells and select **Fill** from the context menu.

Figure 4–18 Fill Cell



4. The value from the source cell is copied into all the other selected cells.

Figure 4–19 Source Cell Value



Note: If Fill is employed across multiple measures, no validation is performed to ensure that data types are appropriate or consistent. It is best to only fill within a single measure.

Modifying Cell 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 using fill. You can also lock a cell value to ensure that any calculation performed during the cell edits do not affect the locked cell values.

After 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".

Locking and Unlocking

When you change a value in a one cell, it can impact other cells, measures, or positions. For example, increasing the value of week 1 Regular Sales in January will also increase the value of the Month Total for January, but will not impact the other weeks in January. In addition to read-only workspaces and measures, RPASCE also provides a locking function in order to protect information. The locking function can be used on cells, measures, and positions. To continue with the above example, if you lock the Month Total for January and then increase the value of week 1 Regular Sales,

the January Month Total will not change because it is locked, but the other weeks of January will be decreased.

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

Measure locking is available for any measure and invokes protection processing. When a measure is locked, all cells for that measure are locked.

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

Note: Locks are not recognized by operations such as custom menus and refresh. Locks are only recognized when a workspace calculation is done.

Cell Locking

Use the cell locking feature 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 to examine various what-if scenarios to determine the best course of action.

RPASCE iterates through the selected cells by measure, then by column, then by row. Locked cell information is immediately transferred to the RPASCE server. The locked cell information is saved with the workspace, and locked cells continue to be locked when the workspace is reopened.

The locked status of a cell is indicated by the presence of a picture of a lock on the left side of the cell. After an eligible cell is locked, the system determines whether the remaining table cells are eligible or ineligible for locking. 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 as a result of data manipulation elsewhere in the workspace.

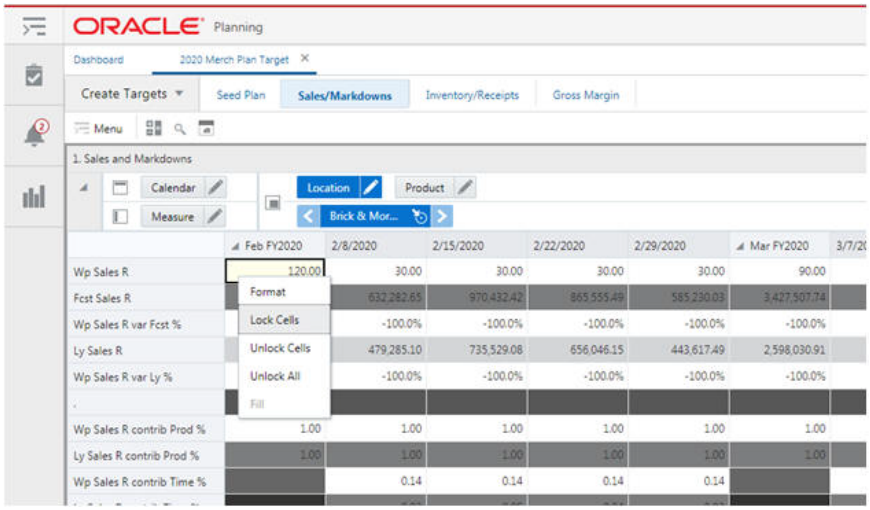
For example, you may want to see the effect of a change to sales value on inventory levels without forcing a change to receipts. Or, you may want to change a sales value at an aggregate level (such as month) and spread the results to only three of the four weeks that comprise that month. In this case, you can effectively hold the second week's sales value constant while spreading the aggregate-level increase among the remaining three weeks.

Cell Locking Example

The goal, when locking a cell, is to make it remain constant while you adjust other cells. In this example, the month level cell is locked, and then one of the week level cells is adjusted. This forces the unlocked weeks to adjust while keeping the month total.

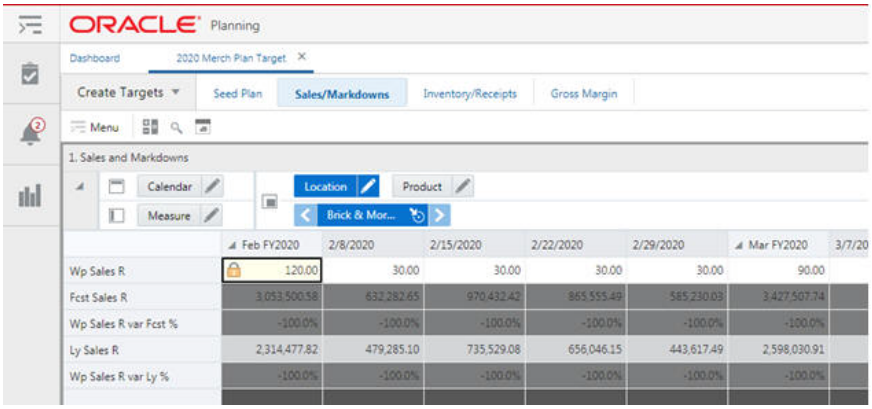
1. To lock the month level cell, right click the cell and click **Lock Cells**.

Figure 4–20 Lock Month Level Cell



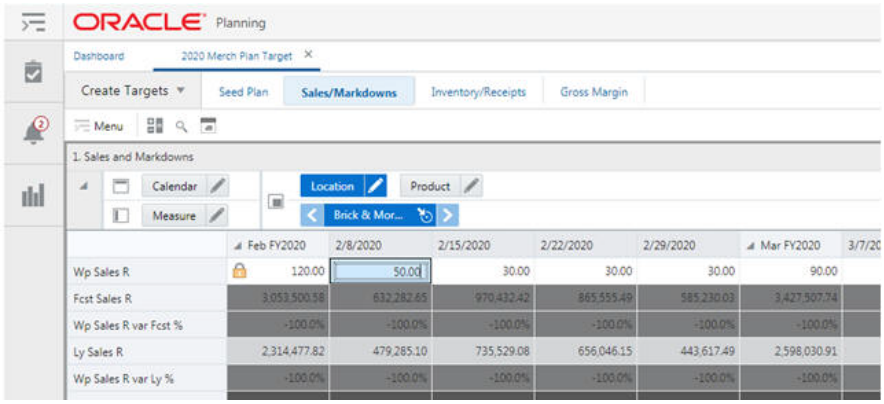
2. Note the lock icon in the locked month level cell.

Figure 4–21 Lock Cell Lock Icon



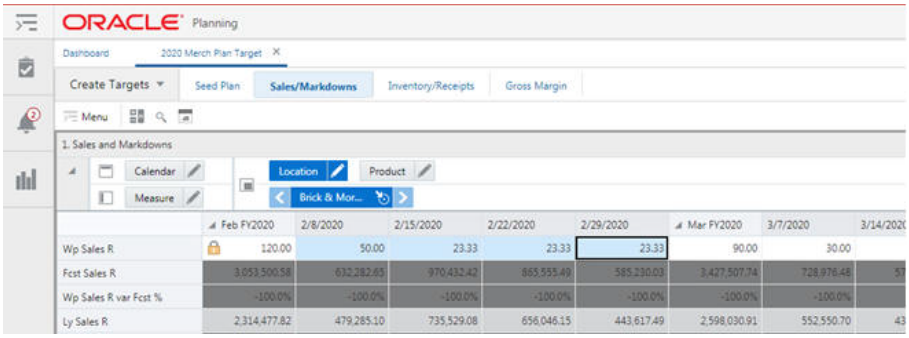
3. Increase the first week of the month.

Figure 4–22 Increase the First Week



4. Click **Calculate**. Note the decrease to the other weeks of the month, while the month total did not change.

Figure 4–23 Calculate



Measure Locking

Use the measure locking feature 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 on the left side of each cell.

Locked measure information is immediately transferred to the RPASCE server. The locked measure information is saved with the workspace, so locking measures enables the save features of the workspace. The locked measure information is saved with the workspace, and locked measures continue to be locked when the workspace is reopened.

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.

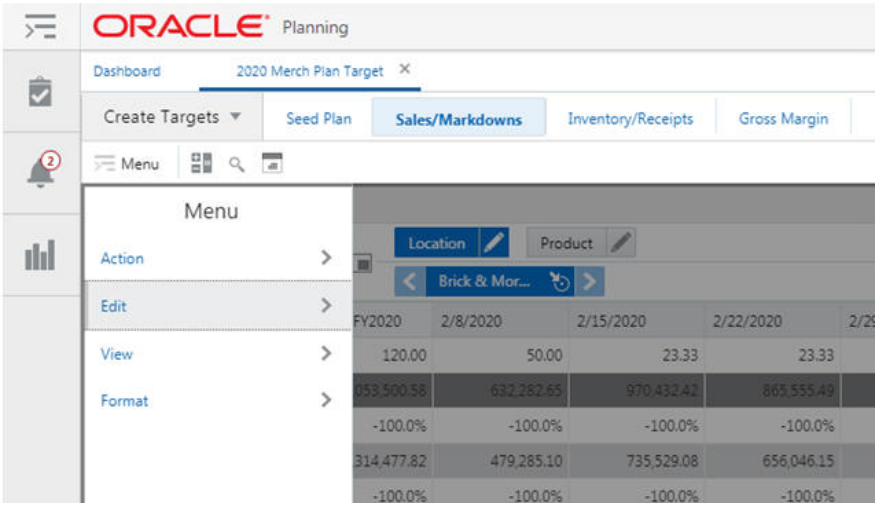
> **Note:** You can only make a selection at one level in the headers of a multidimensional header. Locking and unlocking apply to the selected measure only. Locked measures are designated by a lock icon in the header text of the measure and in its cells.

Measure Locking Example

The goal, in measure locking, is to lock an entire measure. If this measure is included in a calculation with three other measures, and this measure is locked, any change to the other measures will only affect the other three measures; this measure will remain constant.

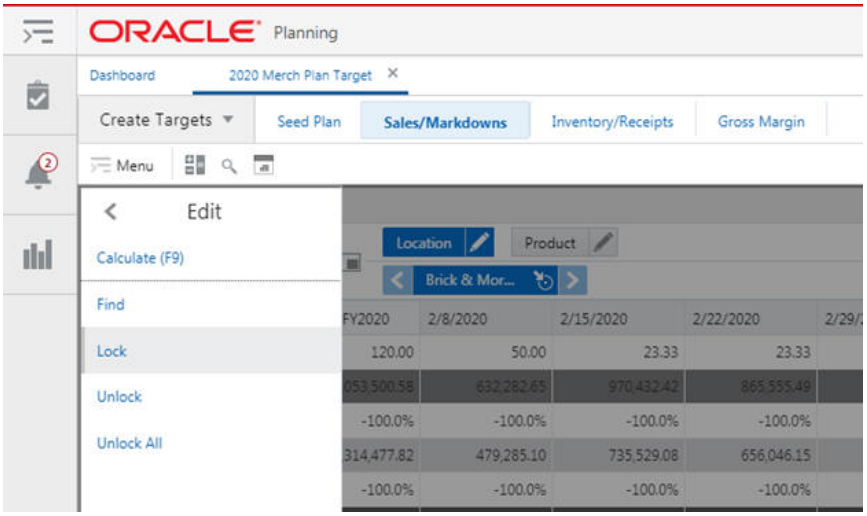
1. To lock an entire measure, left click the header of the measure.
2. Click **Menu/Edit**.

Figure 4–24 Lock Measure Edit



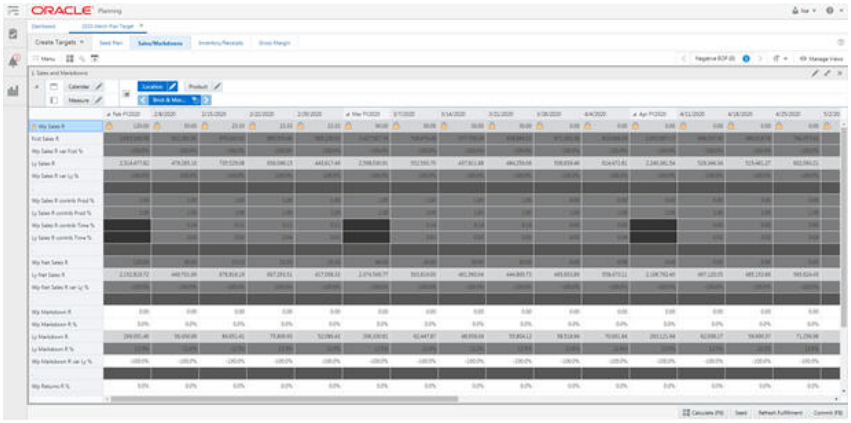
3. Click **Lock**.

Figure 4–25 Lock Measure Lock



4. The entire measure is now locked, and the lock icon appears in the header and each cell. If any other measures are changed, the value of this measure will not change, even if this measure is impacted by a calculation involving the other adjusted measures.

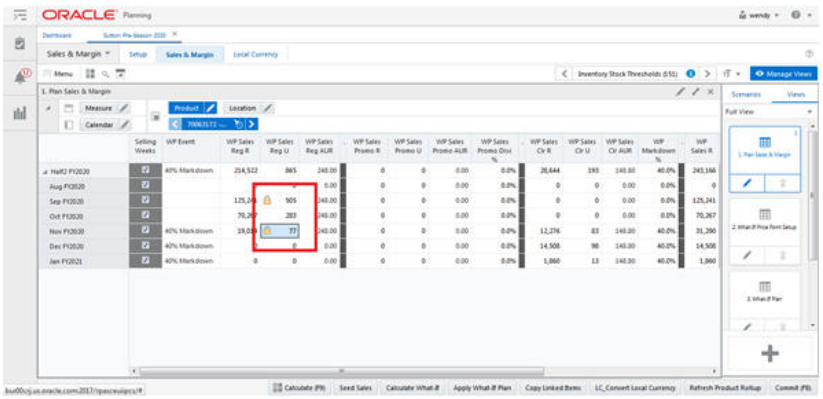
Figure 4–26 Entire Measure Locked



Position Locking

Use position locking 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 lock icon in front of the position name. The cells of the locked position are shaded as read-only.

Figure 4–27 Locked Positions



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. A parent position becomes unlocked if any of its 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 child positions are treated in the same way 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 RPASCE server. The locked position information is saved with the workspace, so locking positions enable the save features of the workspace. The locked position information is saved with the workspace and locked positions continue to be locked when the workspace is reopened.

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 workspace or cancel the position locks. You are warned if a cell lock is affected and

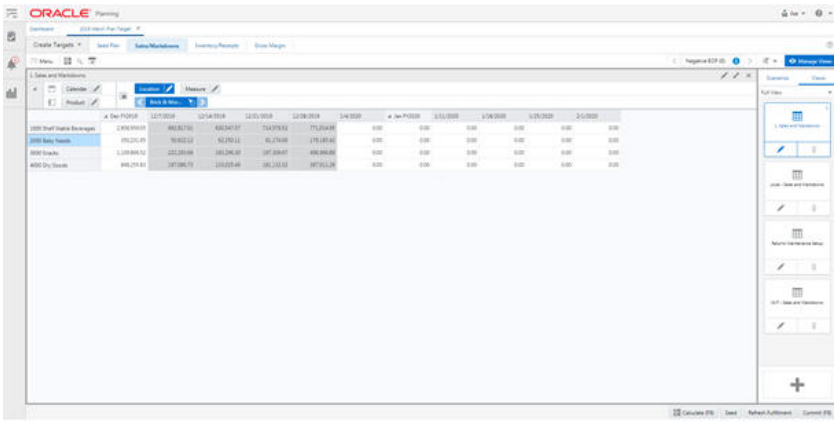
given the choice of canceling the position lock or unlocking the affected cell locks and continuing. If both edits and cell locks are affected, then you see both dialog boxes, with the edit dialog box appearing first. If you cancel the position lock from either dialog box, then no action is taken against either locked or edited cells.

Position Locking Example

The goal, in position locking, is to lock a position so that it remains constant while you adjust other positions. In this example, one position in a department is locked, then the group total is adjusted at the higher level. This forces the unlocked departments to adjust while keeping the locked department unchanged.

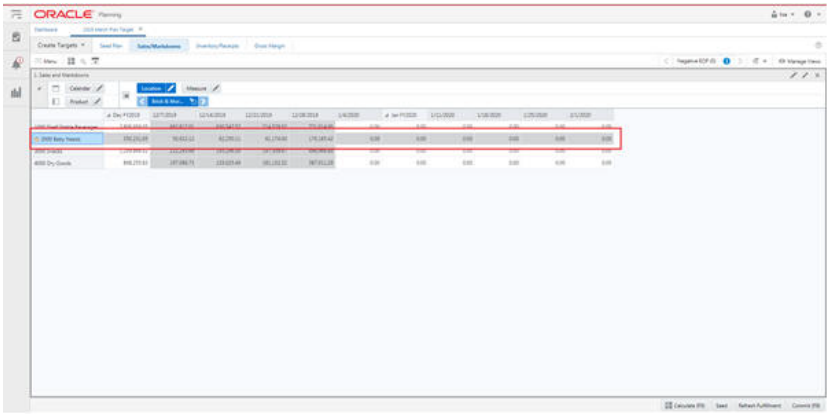
1. To lock one of the department level positions, left click the header of the position, in this case the department name.

Figure 4–28 Locked Subclass



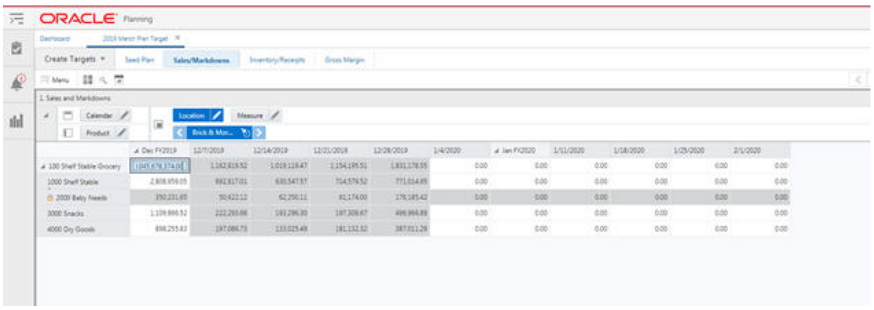
2. Click **Menu/Edit**. Then, click **Lock**.
3. The entire measure position is now locked, and the Lock icon appears in the header of the locked position, but not each cell.

Figure 4–29 Entire Measure Position Locked



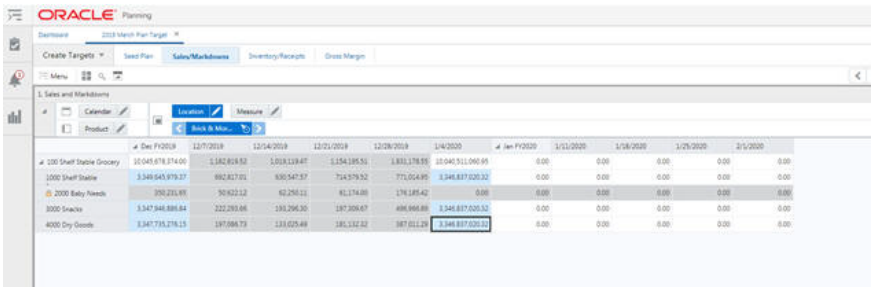
4. Increase the group level value.

Figure 4–30 Increase the Group Level Value



5. Click **Calculate**. Note that the unlocked departments increased, while the locked department did not change.

Figure 4–31 Calculate



Locking and Unlocking

You can initiate locks by selecting a cell, measure, or position within the pivot table and then selecting one of two options to initiate a lock or unlock action. You can use either the right click context menu or the quick access menu.

Locking Using the Right-Click Context Menu

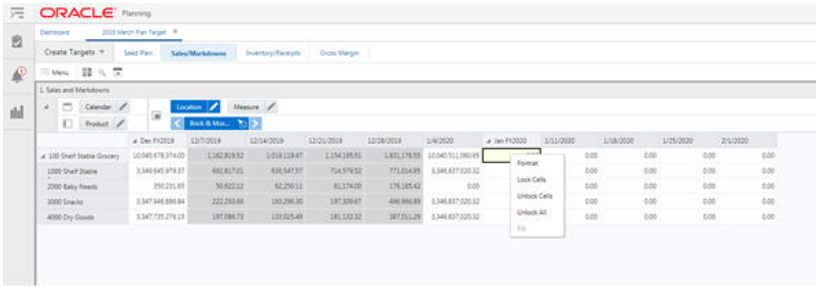
The following locking options are available.

- **Lock Cells:** locks all highlighted cells
- **Unlock Cells:** unlocks all highlighted cells
- **Unlock All:** unlocks all cells without the need to highlight

To lock using the right-click context menu, complete the following steps:

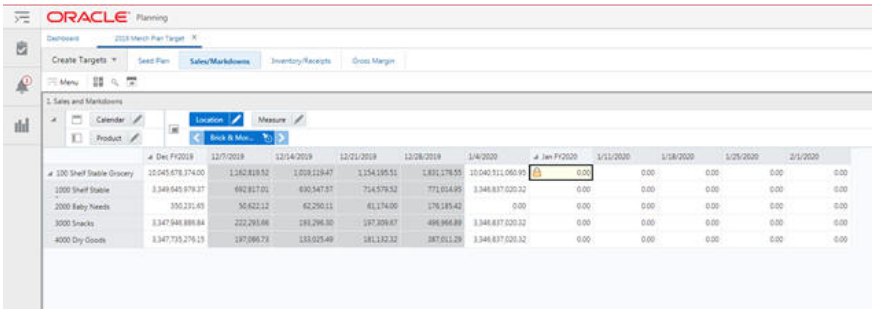
1. Right click the cell, measure header, or position header you want to lock. In this example, right click the cell. The context menu becomes visible.

Figure 4–32 Lock Right Click



2. Select the desired locking action (Lock Cells, Unlock Cells, or Unlock All).

Figure 4–33 Lock Action



Locking Using the Quick Access Menu

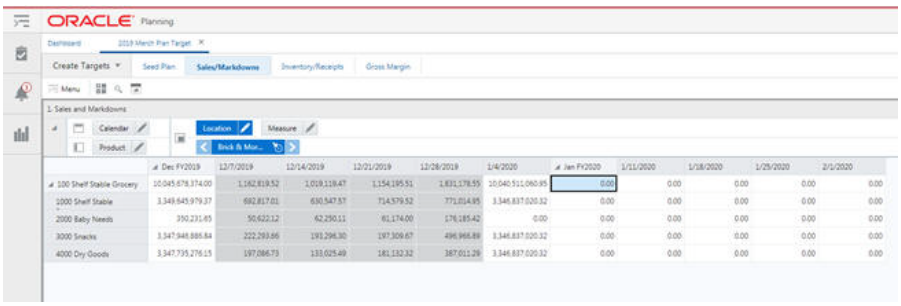
The following locking options are available.

- **Lock:** locks all highlighted cells, measures, or dimensions
- **Unlock:** unlocks all highlighted cells, measures, or dimensions
- **Unlock All:** unlocks all cells, measures, or dimensions

To lock using the quick access menu, complete the following steps:

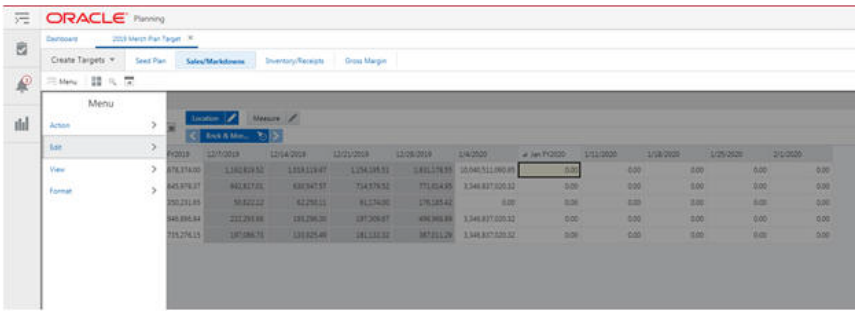
1. Left click the cell, measure header, or position header you want to lock. In this example, left click the cell.

Figure 4–34 Lock Quick Access



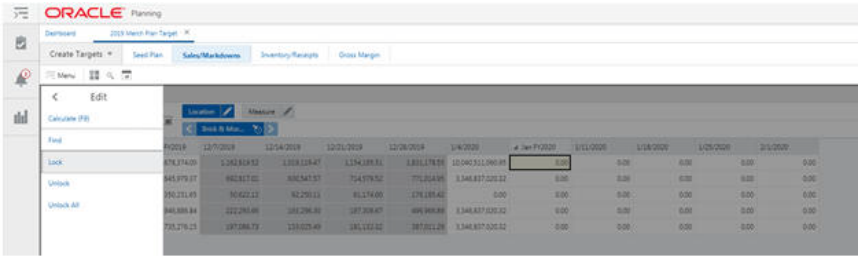
2. Click **Menu/Edit**.

Figure 4–35 Edit



3. Select the desired locking action (Lock, Unlock, or Unlock All).

Figure 4–36 Locking Action



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 RPASCE 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 or 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 is updated in one action. Protected cells or measures appear highlighted in a different color in the view. This is a configurable feature.

Measure Protection Processing

In measure protection processing, cells become read-only when you make changes to enough measures. This ensures that no other possible changes exist that 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 previous example, Rules 1 and 2 can 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 locks all instances of a measure when any position of the other measures in the rule are edited.

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

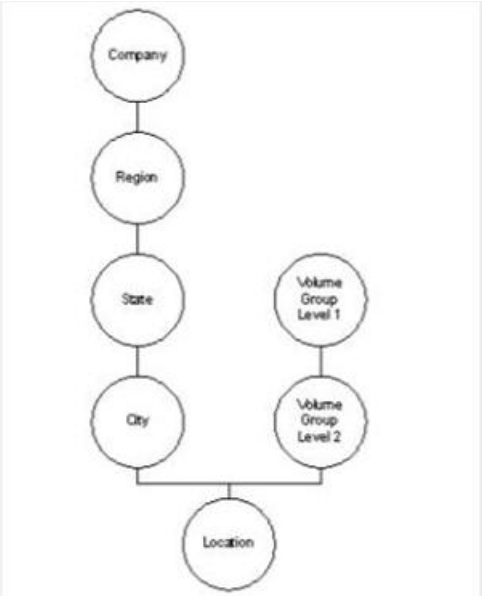
When you edit the measure B for product 1, location 1, and week 1 and measure C for product 1, location 1, and week 2, the measure A becomes read-only for all products at all locations in every week

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 4–37 Location Dimension



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.

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 external applications (such as Excel) to the system as well as from RPASCE to those external applications.

To apply the operation, select data from the view. After selecting the appropriate cells, you can cut, copy, and paste.

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.

> **Note:** You cannot cut data from non-editable, read-only, protected, or locked measures or cells.

To cut data, complete 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 the shortcut command Ctrl + X)

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 that you can use to transfer data within RPASCE as well as to an external

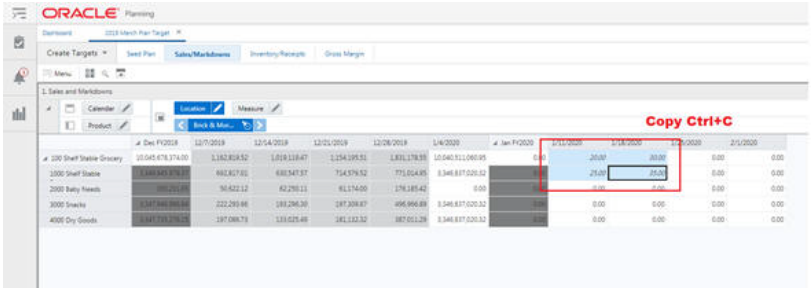
application such as Excel. It also helps you to transfer large amount of data easily. When cells are copied, only the unformatted textual content is transferred.

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

To copy data, complete the following steps:

1. Select all data cells in the pivot table that you want to copy.

Figure 4–38 Select Cells to Copy



2. To copy the data to the clipboard, use the shortcut command Ctrl + C.

Paste

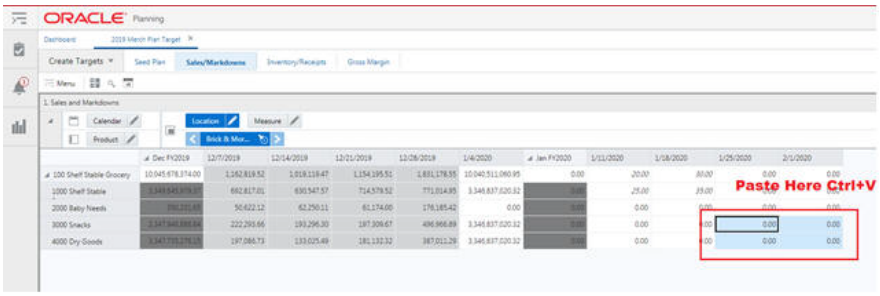
After you have copied or cut data from a view, you can paste the data to other cells within RPASCE or you can paste it to an application such as Excel. The Paste option pastes the data that was last placed on the clipboard into the selected cells.

> **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, complete the following steps after you have copied or cut data from another location:

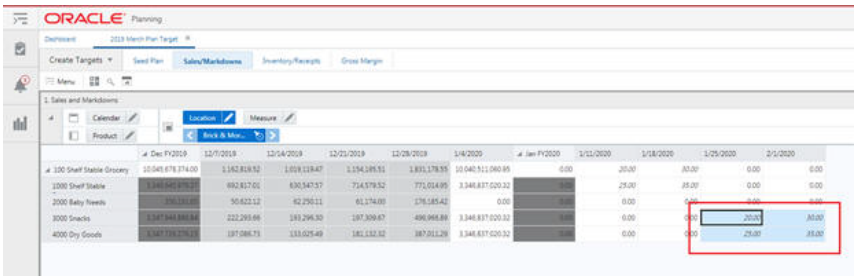
1. Select the cells into which you want to paste the data.

Figure 4–39 Select Cell to Paste



2. To paste the data into the cells, use the shortcut command Ctrl + V

Figure 4–40 Paste Data



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 workspace is opened.

Read-only cells by default have a gray cell background color. This same default color is 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.

Figure 4–41 Read-Only Measure

Workspace Operations

The majority of the work you perform within the application occurs within a personal workspace built around a segment. These workspaces are constructed by creating a copy of the subset of the applications data described by the segment and are, therefore, to a degree, independent from the domain and its data.

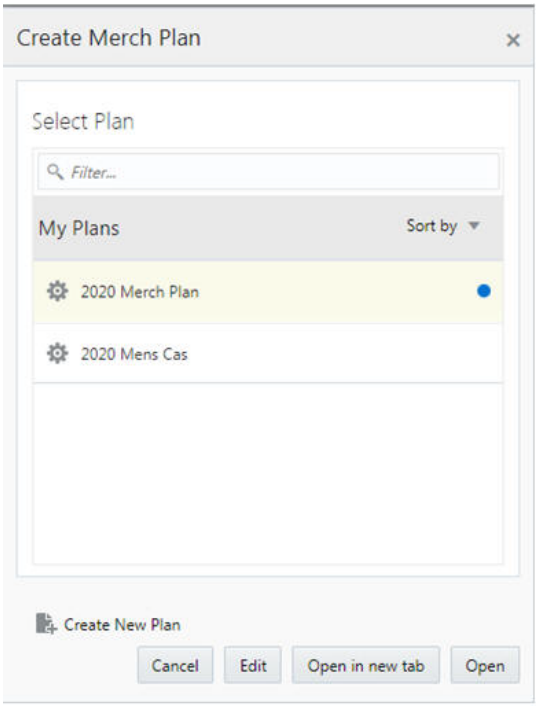
There are two reasons for the creation of workspaces within the application. First, by limiting the workspace to the subset of the application's data defined within a segment, it is possible to improve the overall performance of operations. Second, the workspace serves as a sandbox where you can experiment with the data without being concerned about the effects of those experiments on the main application data.

However, the use of workspaces by the application introduces the need to manage the flow of data between the domain and the workspace through a number of workspace operations. This section describes the operations you can perform on workspaces.

Opening Workspaces

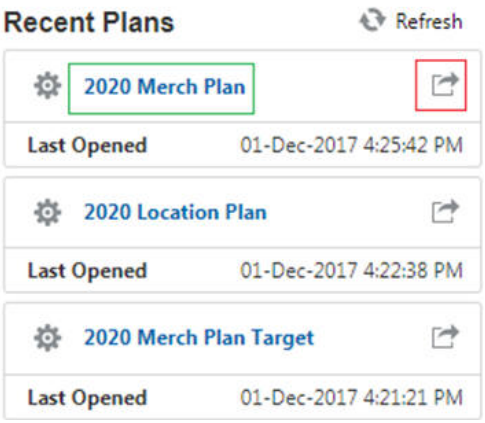
In order to continue working within a segment workspace, either select the segment from the Select Segment dialog reached from the task module or, if you have recently worked within that workspace, from the Recent Plans list.

Figure 4–42 Opening a Workspace



In Figure 4–42, two segments have been defined for the Create Merch Plan task. The segment 2020 Merch Plan is selected within the dialog with an option to open it in current application browser tab or a separate browser tab.

Figure 4–43 Recent Plans



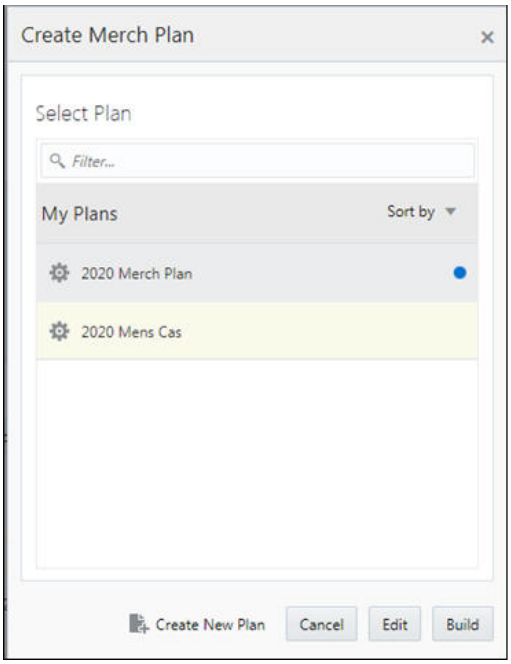
Because the 2020 Merch Plan workspace has been recently used, it is also present within the Recent Plans section of the dashboard. Click the link highlighted in green to open the segment workspace in current application browser tab. Click on the link highlighted in red to open it in separate browser tab.

The workspace opens in a new application tab so that you may begin working with it.

Building Workspaces

Whenever you define a segment, a workspace will automatically be created based upon that segment. When you create a segment using the Segment wizard, a workspace is built after you click Finish. This serves as the initial workspace you may use to work with. Additionally, it is common practice to create a regularly schedule that the system uses to automatically rebuild workspaces (usually in response to the loading of new data to the application). However, under certain circumstances, such as duplicating a segment, it may be possible that a segment you have defined will not have a workspace built and available when you wish to work in it.

Figure 4–44 Building Workspaces



In Figure 4–44, the segment 2020 Merch Plan has a workspace ready for use (as indicated by the blue circle) and can be opened. The segment 2020 Mens Cas cannot be worked in until a workspace has been built.

When this occurs, selecting a segment with no available workspace causes the system to build that workspace in an on-demand fashion. This on-demand workspace build operates like the initial workspace creation when the segment was defined and results in a notification when the workspace is ready to be opened. To build the 2020 Mens Cas segment, select it and click **Build**.

Calculating Workspaces

Edits made to the cells in a view do not automatically result in updates to values affected by those edits. Instead, the propagation of changes to the workspace is deferred until an explicit action called a calculation is performed. The reasons for this are two-fold.

First, due to the large number of relationships between the measures in a workspace, a single edit might result in changes to many values. In order to prevent the application

from becoming unresponsive after an edit, these resulting changes are not immediately applied until a calculation is performed.

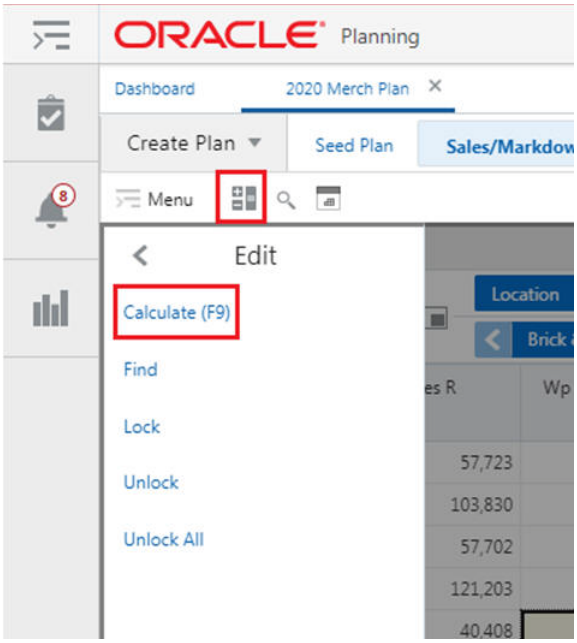
Second, the business logic defining how values in the workspace will update based upon an edit is sophisticated enough to be able to choose between multiple ways of updating the workspace data for a set of edits or combination of edits and cell locking, depending on which measures have been edited or locked.

For example, consider the relationship between total sales (the summation of regular, markdown, and clearance sales), markdown sales, and markdown percentage. An edit to total sales results in a change to markdown sales so that the markdown percentage remains fixed. However, if both total sales and markdown sales are edited (or if one is edited and the other locked), then the markdown percentage will instead be updated based upon the edit.

In order to allow these more sophisticated methods for propagating changes to the data, the system allows several edits to be entered before their effects are evaluated in a calculation.

Once all edits desired have been entered, a calculation can be initiated by selecting the Calculate item from the Edit menu.

Figure 4–45 Calculate Workspace



Click **Calculate** from either the menu bar above the open views or the action tray below it or use the Calculate accelerator hotkey (F9).

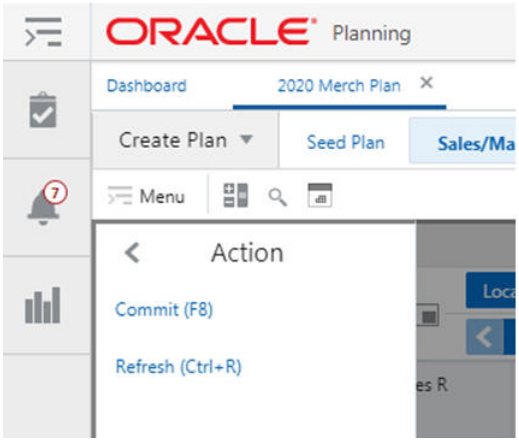
Refreshing Workspaces

When a segment is built, the workspace for that segment is initialized with the most current data in the application. However, after a segment has been built, its workspace does not automatically update to reflect changes to the application's data such as the loading of updated sales information. In order to incorporate the most recent changes to the application's data into a workspace, it is necessary to perform an operation called refreshing the workspace.

When a workspace is refreshed, a rule group known as a refresh rule group is executed in order to perform the refresh and update the data in the workspace. This rule group defines which measures in the workspace must be updated to reflect changes in the application and in conjunction with the calculation group ensure that all measures derived from refreshed measures (such as variances and other Key Performance Indicators) are updated in response to the changing data.

Note that some workspaces, mainly those associated with some administrative activities, do not define a refresh rule group and, therefore, cannot be refreshed.

Figure 4–46 Refresh Workspaces

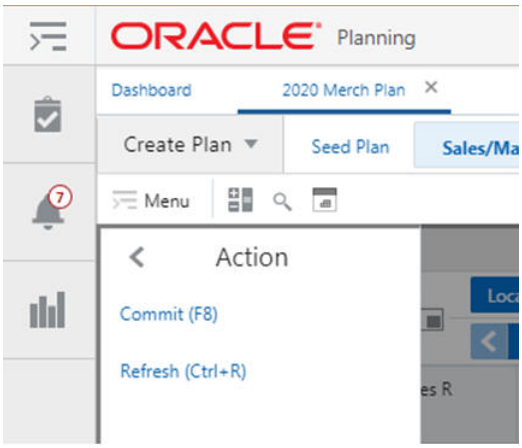


Committing Workspaces

Once a workspace has been built for a segment, all work performed is saved within that workspace. All edits, calculations, and actions are saved within the workspace sandbox but are reflected outside of the workspace. In order for the changes made within the workspace to be available to be an input to subsequent steps in the planning process or to be exported for use outside of the application, the changes within the workspace must be applied to the domain. This process is called committing the workspace. When a workspace is committed, the values contained within it are written back to the domain in accordance to the rules defined within the commit rule group.

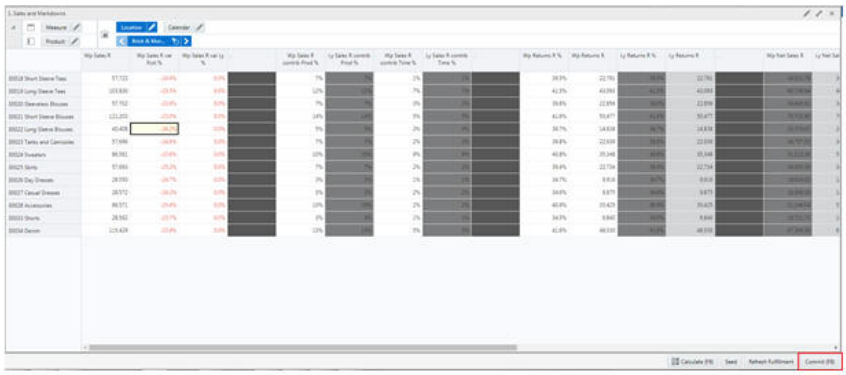
Because the work performed within a segment workspace is saved only within that workspace until the commit, that work can be lost if the segment workspace is recycled and rebuilt without committing the workspace. It is a common practice to set up a schedule for performing segment rebuilds (usually to coincide with the loading of new data into the domain on a regular basis), so it is important for you to know the schedule for your organization and to plan committing workspace segments around this schedule to prevent the loss of your work. In order to commit a workbook, select **Commit** from the Action menu.

Figure 4–47 Commit Workspace



Click **Commit** from the action tray below the view or Commit accelerator hotkey F8.

Figure 4–48 Commit



Once the workspace commit has been initiated, the system makes a copy of the current data within the workspace and prepares to commit that data back to the domain. In order to prevent data inconsistency, the system only commits a single workspace at a time. As a result, when multiple users are interacting with the application and committing segment workspaces, a delay can occur between the initiation of a workspace commit and its conclusion.

Once the workspace commit has completed, the system creates a notification to inform you that the data has been processed by the system. In the interim, you may continue to perform additional work within the workspace or you may move to another segment workspace.

Figure 4–49 Commit Notifications

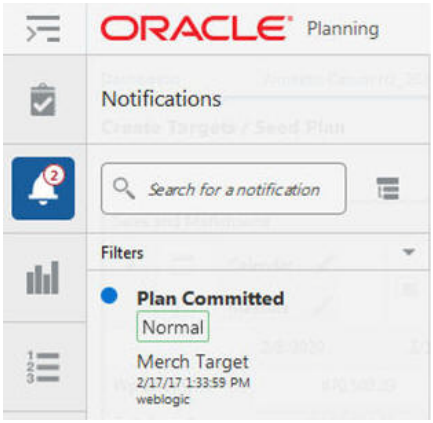


Figure 4–49 shows an example of the notification received at the conclusion of a segment workspace commit.

Closing Workspaces

When you are finished working in a segment workspace, you may close it by selecting the close icon on the application tab for the workspace. You do not need to save your work prior to closing the workspace, as all operations performed in the workspace (refreshes, calculations, commits, and so on) cause the workspace to be automatically saved.

Figure 4–50 Close the Workspace

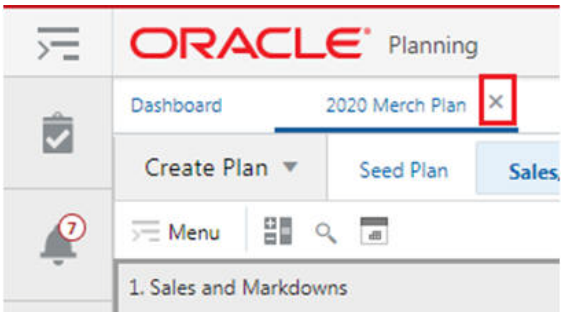


Figure 4–50 shows the application tab for the open 2020 Merch Plan segment workspace Click the **X** icon on the tab to save any outstanding edits and close the workspace.

Note: If the browser in which the application is running is closed directly, edits that have not been calculated can be lost. Be sure to close all open segment workspaces and log out of the application prior to closing the browser window.

5

Segments

A segment is a selection of products, locations, and times that defines a workspace. These selections have a name, and they last until they are deleted.

A segment is not a workspace. A segment is the positions that define a workspace and a key to opening the associated workspace.

Segments can be created, edited, duplicated, renamed, and deleted, and are used to build the associated workspace.

In an RPASCE application, segments are usually referred to by the name of the result of the application. For example, in Merchandise Financial Planning, a segment would be referred to as a *plan*.

Understanding the Segment Dialog Box

You can use the Segment dialog box to manage all segments for a workspace type. From here, you can:

- Filter for an existing segment
- Create a new segment
- Build the workspace associated with a segment
- Edit an existing segment
- Open an existing workspace, both in the current browser tab or in another one
- Determine whether a given segment is associated with a workspace

Figure 5–1 Segment Dialog Box

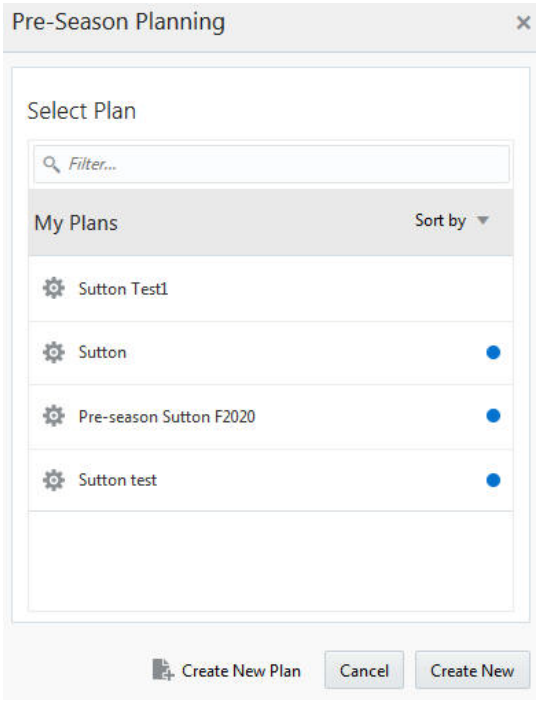
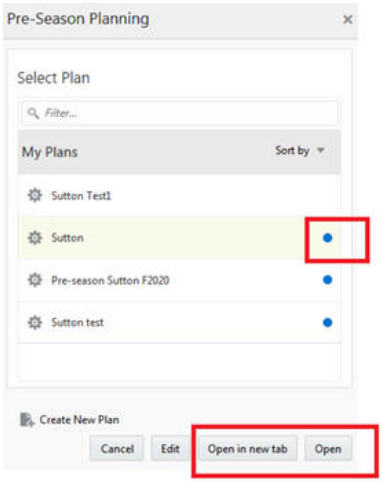


Figure 5–1 shows the segments that are already defined. You can create a new segment at any time by selecting the link in the lower left hand corner, or, when nothing is selected, by clicking **Create New** in the lower right.

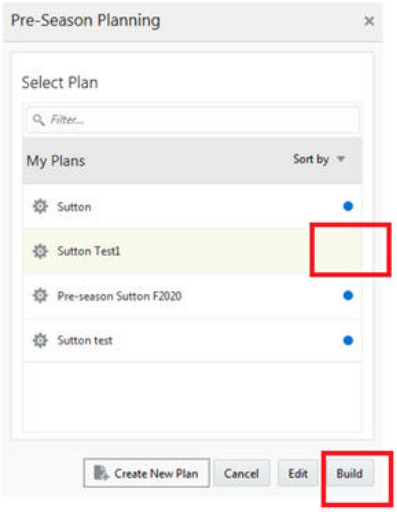
The blue dot next to a segment means that the segment is active, that is, a workspace has already been built for that segment. This means that the workspace can be opened, either in this browser tab or another one.

Figure 5–2 Pre-Season Planning Active Segment



Conversely, an inactive segment, that is, one without a blue dot, must have its associated workspace built before that workspace can be opened.

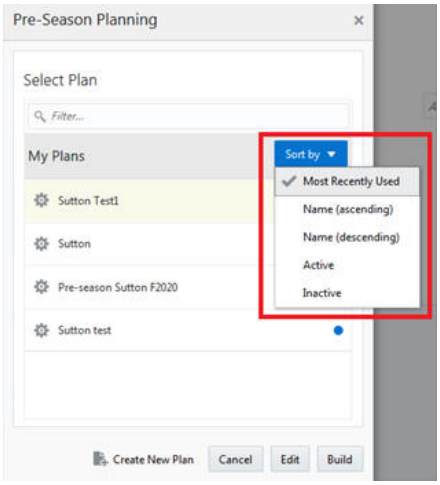
Figure 5–3 Pre-Season Planning Inactive Segment



In order to find a particular segment, you can sort and filter the segment entries.

To sort the entries, select an option in the Sort by drop-down list.

Figure 5–4 Pre-Season Planning Sort By List

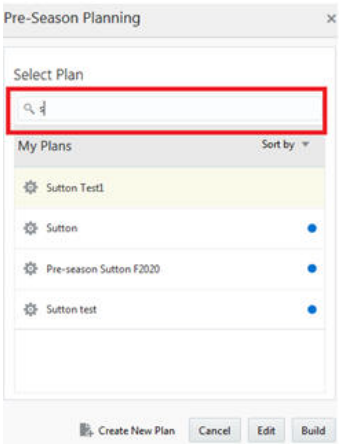


The Sort by options are:

- **Most Recently Used:** The segments are displayed in the same order as they appear in the Most Recently Used section of the dashboard.
- **Name (ascending):** The segments are sorted in alphabetical order.
- **Name (descending):** The segments are sorted in reverse alphabetical order.
- **Active:** The active segments are sorted alphabetically.
- **Inactive:** The inactive segments are sorted alphabetically.

To filter for a particular segment, type text into the filter box. In the Pre-Season Planning Filter, a single letter, s, has been entered in Figure 5–5. The list of segments displayed include only those with an *s* in the labels.

Figure 5–5 Pre-Season Planning Filter

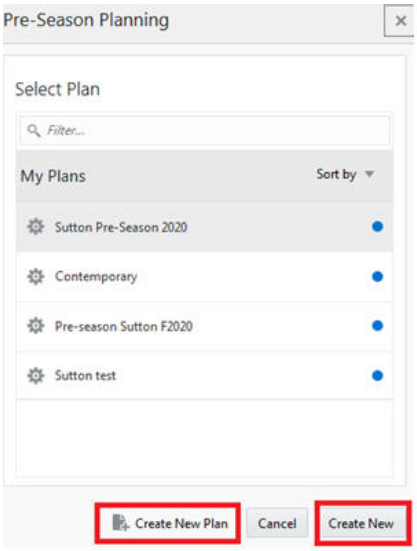


Creating a New Segment

A new segment can be created either with the Create New link in the lower left, or, when no segments are selected, by using the Create New button. In either case you are prompted for a label for that segment, and then taken into the wizard (see Wizards).

If you select any of the segments from the list, you no longer see the Create New button. Instead, the buttons Edit, Open in new tab, Open are displayed. In this case, you create a new segment using Create New Plank.

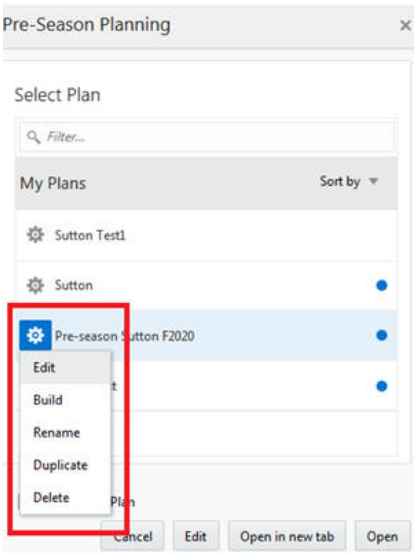
Figure 5–6 Create New Segment



Action Menu

In order to take action on a segment, click the **Action Menu** icon next to the segment. A context menu appears, with four options: Edit, Build, Rename, Duplicate, and Delete.

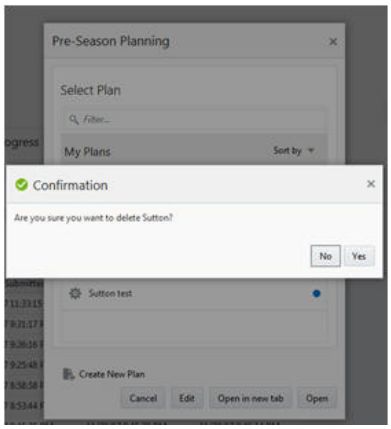
Figure 5–7 Segment Action Menu



Deleting a Segment

In order to delete a segment, select **Delete** from the Action menu. At the confirmation dialog box, click **Yes** to delete the segment. The workspace must be closed before it can be deleted.

Figure 5–8 Deleting a Segment

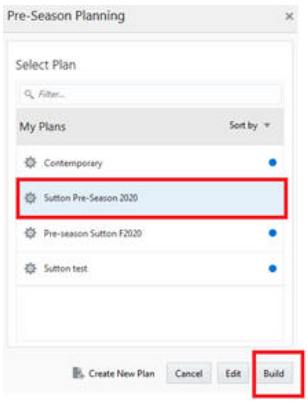


Note: Deleting a segment also deletes the workspace it is associated with. Make sure that you have finished working with the workspace before deleting the segment

Building a Segment

In order to build a workspace for segment, select **Build** from the Action menu/segment dialog box. The workspace begins building in the background (see Asynchronous Build).

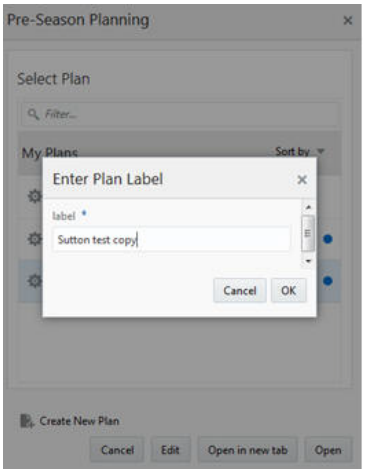
Figure 5–9 Building a Segment



Duplicating a Segment

In order to duplicate a segment, select **Duplicate** from the context menu. The dialog box prompts you for a new name and then copies the segment and displays it in the segment list. Any segment can be duplicated at any time.

Figure 5–10 Duplicating a Segment



Note: Duplicating a segment copies the selections that define the workspace, but does not make a copy of the workspace. The associated workspace must be created (built) before it can be used.

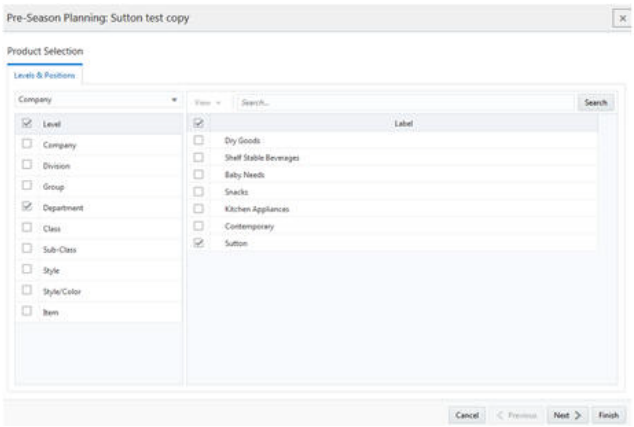
Editing a duplicated segment has no effect on the original segment or workspace.

Editing a Segment

When you select the **Edit** option from the context menu, the wizard opens. The wizard comes prepopulated with the saved selections from the segment. This option is useful when a new workspace must be created with the same products and locations, but for a different time period, such as the next week or quarter.

You cannot edit a segment when the workspace associated with the segment is open or being built or rebuilt. This ensures that you do not break the segment or its workspace.

Figure 5–11 Editing a Segment



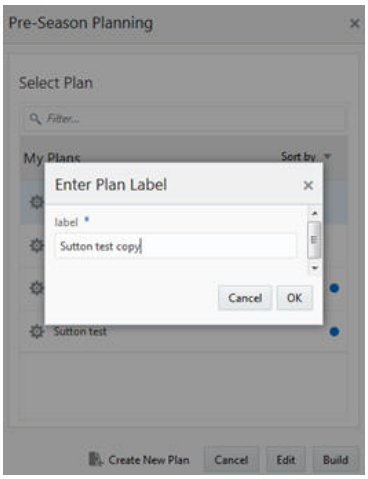
Note: Editing a segment and selecting **Finish** on the wizard deletes the existing workspace associated with the segment and recreates the workspace with the revised selections. Make sure you are finished with the workspace before editing the segment.

Renaming a Segment

When you select the **Rename** option from the context menu, you are prompted for a new segment label. After you change the label, the new label appears in the segment dialog and in the dashboard's most recently used list.

You cannot rename a segment when the workspace associated with the segment is open or being built or rebuilt. This ensures that you do not break the segment or its workspace.

Figure 5–12 Renaming a Segment



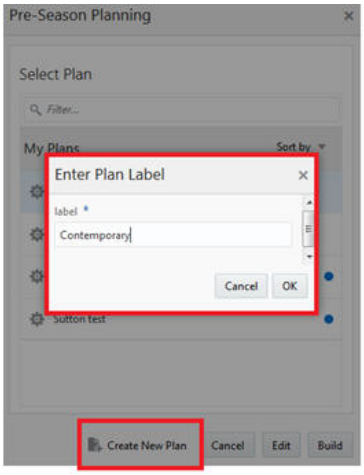
Wizards

When you select **Create New or Edit** in the Segments dialog box, a wizard opens. The wizard take you through a set of screens to select the positions for each dimension in the workspace.

When you select the **Edit** option, the wizard is pre-populated with the saved selections from the segment. This option is useful when a new workspace must be created with the same products and locations, but for a different time period, such as next week or quarter.

When you select the **Create New** option, the wizard is not pre-populated with any selections from the segment.

Figure 5–13 Wizards



Level and Position Selector

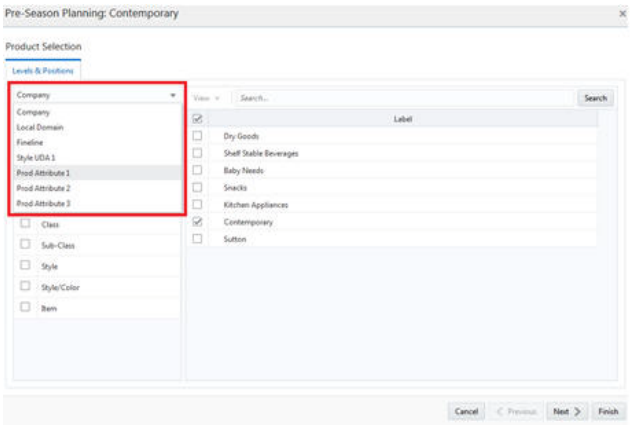
To select a level or position, complete the following steps.

1. Once in the wizard, select the positions for each dimension by placing a check next to the position.

   You can view alternate branches of the hierarchy or dimension by using the Branch Selector drop-down list. When you select a different branch in the drop-down list, you will notice that different dimensions are displayed in the Levels and Dimensions area.

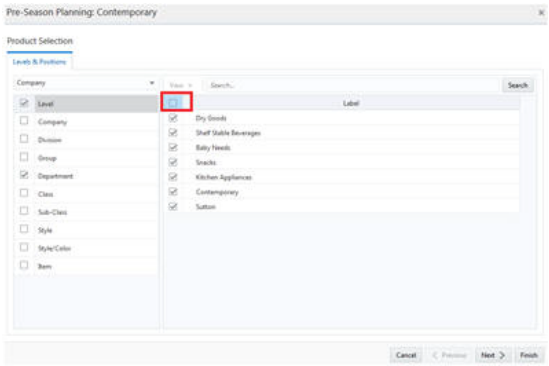
   Note that if you select a large number of positions, it may impact the time required for the workspace to open. Select only the positions required for the current task.

Figure 5–14 Select Positions



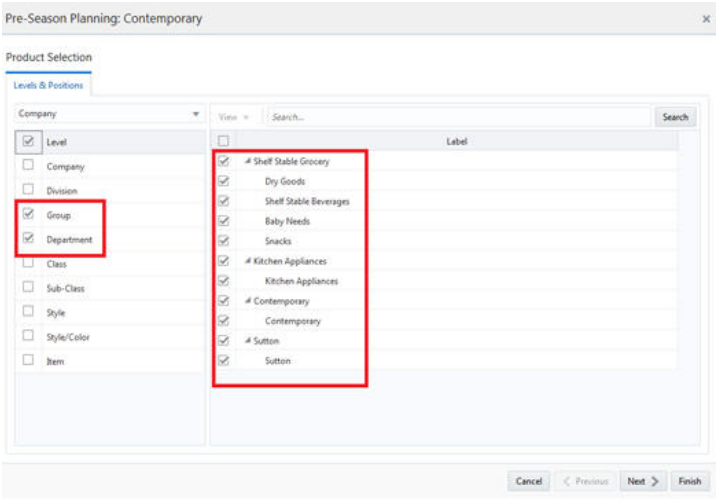
2. To select all positions, click the top of the column next to all the positions.

Figure 5–15 Select All Positions



3. To change the level of the positions to select from, place a check next to the desired level in the top left of the screen.

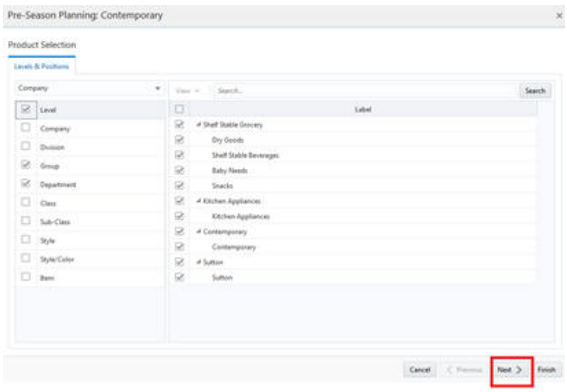
Figure 5–16 Change Position Levels



Next, Previous, Finish

Once you have made your position selections for a dimension, click **Next** or **Previous** to move to the next or previous dimension selection screen. If all positions for all dimensions have been selected, click **Finish** to complete the workspace build and close the wizard.

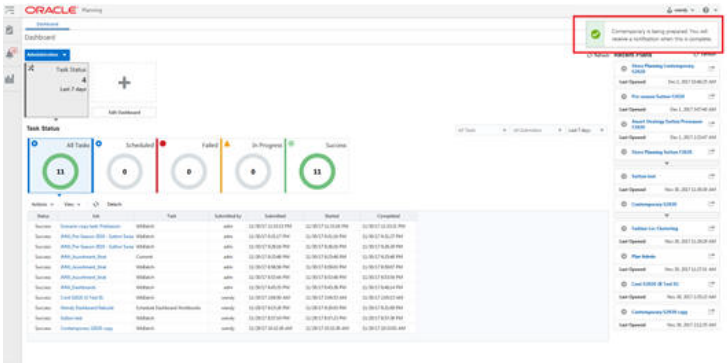
Figure 5–17 Next Dimension



Asynchronous Build

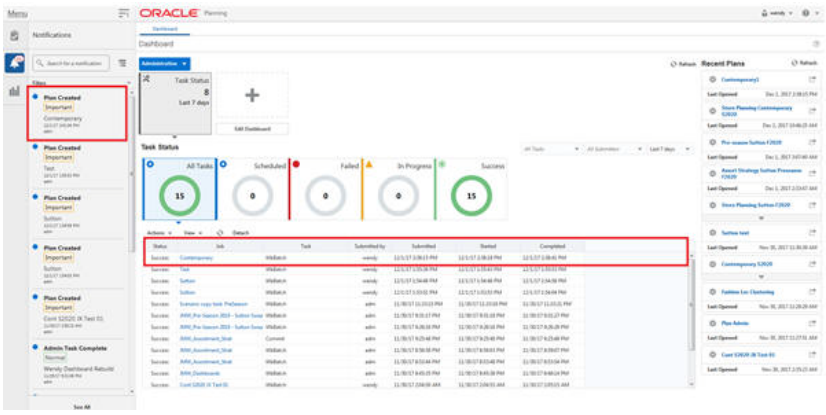
Once you click **Finish**, the workspace begins building in the background. You can work on other tasks and workspaces while this is occurring. When the workspace build is complete, you will receive a Snackbar notification. You can also see the status at the bottom of the Administration Dashboard.

Figure 5–18 Asynchronous Build



When you select a workspace from the Tasks module, the Segment dialog box is displayed.

Figure 5–19 Asynchronous Build Notification



6
Notifications

You can use the Notifications module to determine the status of different RPAS activities, such as Online Administration Tasks, segment build completions or failures, segment commit completions or failures, approvals and rejections, and so on.

In this way, you can continue working on other tasks while the submitted action occurs in background. You receive a Snackbar notification at the bottom of the screen when the activity status has updated for few actions. You can open a workspace by clicking **Plan Created Notification** in the Notification Panel or Notification Table in the Notification Tab.

You only see notifications that are addressed to you. You can further reduce the number of notifications by:

- Search for a notification using the search box
- Filter the notifications by time period, type, or severity
- Group the notifications by type, department, or location

Table 6–1 Notification Severity

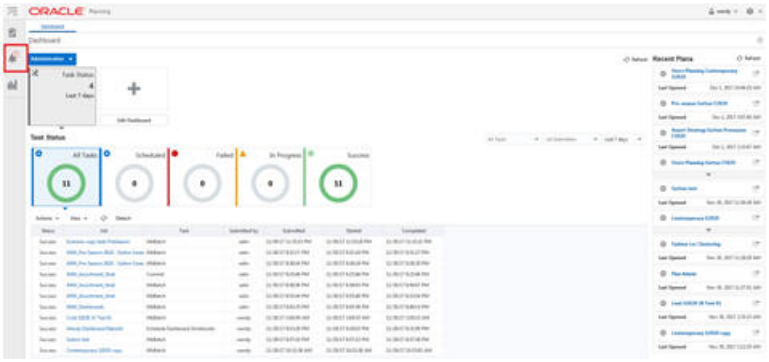
Notification	Severity
Administrative Task Completed	Important
Administrative Task Failed	Critical
Workspace Built	Important
Workspace Build Failed	Critical
Workspace Committed	Normal
Workspace Commit Failed	Critical

Notifications Panel

To view the Notifications panel:

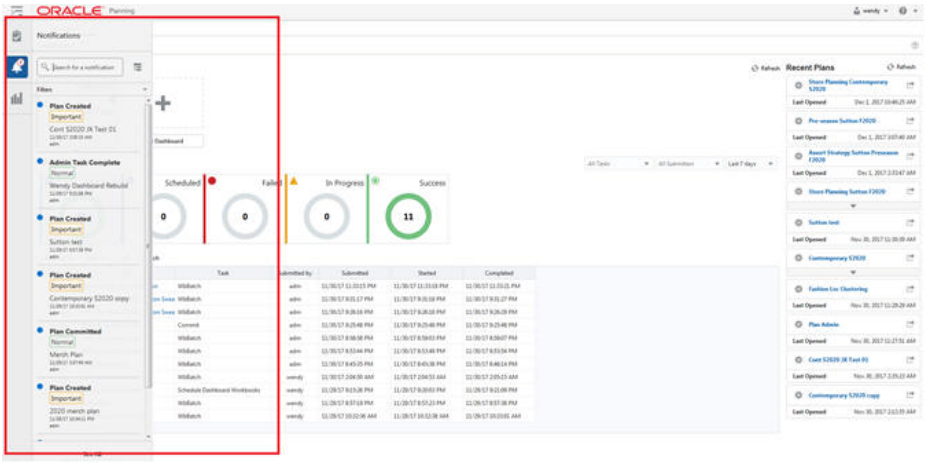
1. Click **Notifications** on the left sidebar menu.

Figure 6–1 Notifications



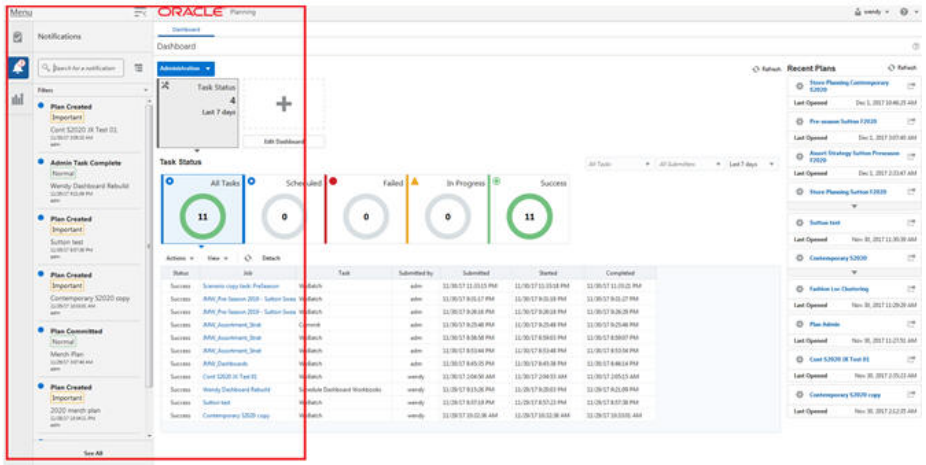
2. You can click on either the notifications icon to open the notifications dialog box. If launched this way, it partially covers the current workspace that you are viewing.

Figure 6–2 Notification Icon



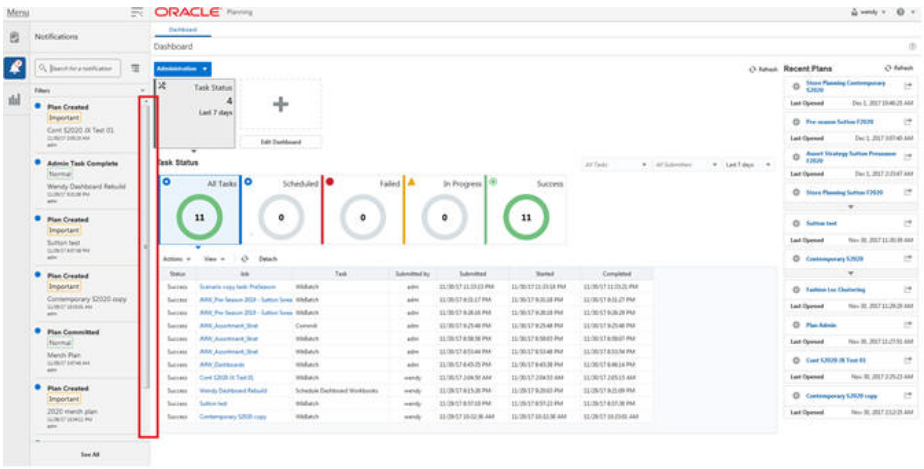
3. If you want to continue with the work in the current workspace and simultaneously launch the Notifications panel, click **Menu**, which launches the notifications list by moving the current workspace.

Figure 6–3 Via Menu



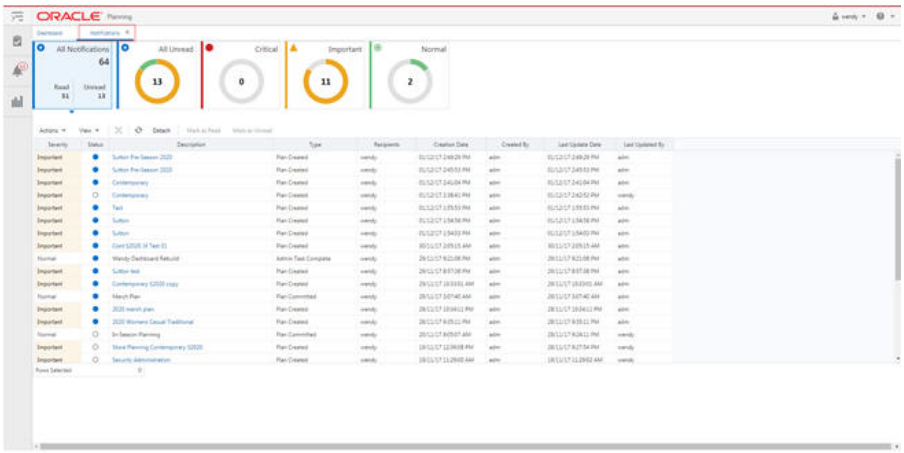
4. You can use the scroll bar to move up and down the list of notifications.

Figure 6–4 Notifications Scroll Bar



5. Click **See All** to see all notifications in list form. It opens a Notifications Tab.

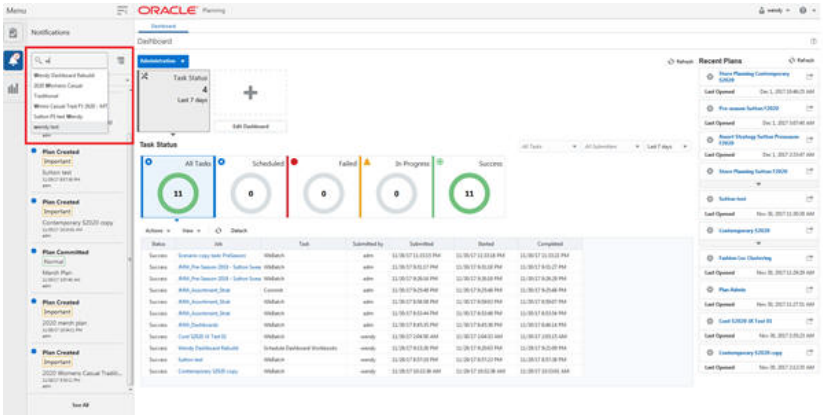
Figure 6–5 Notifications Tab



Searching for Notifications

To search for a specific notification, enter a search term in the Search box.

Figure 6–6 Searching for Notifications

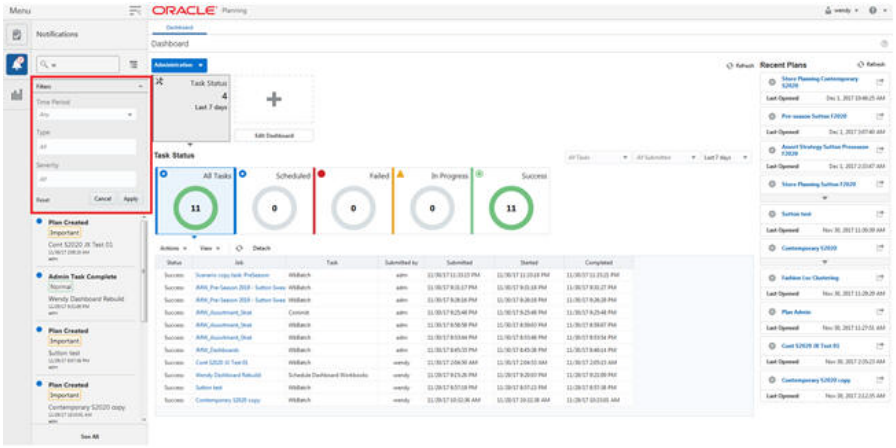


Filtering Notifications

To filter notifications:

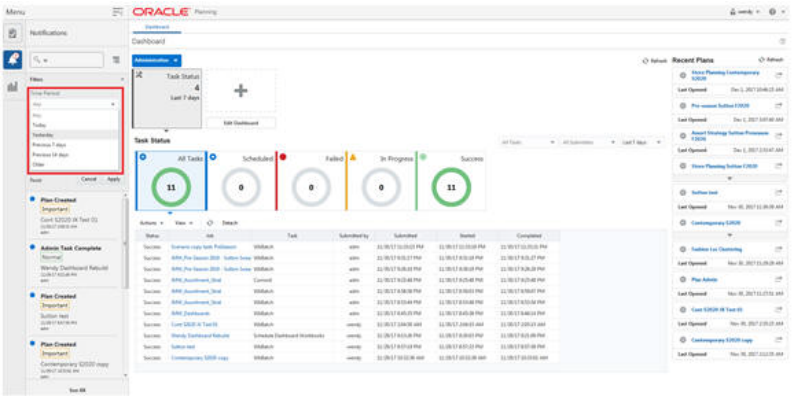
1. Once in the Notifications Module, click the **Filters** drop-down list to see the list of available filters. You can filter by Time Period, Type, and Severity. You can also click **Reset** to clear all filters, or click **Apply** to apply the filters.

Figure 6–7 Notifications Filter



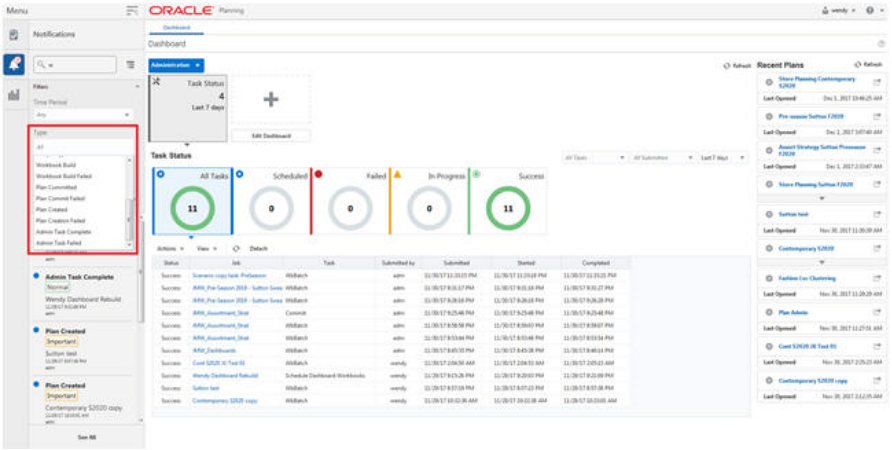
2. Provide values for Time Period, Type, and Severity in the Time Period filter.

Figure 6–8 Time Period Filter Options



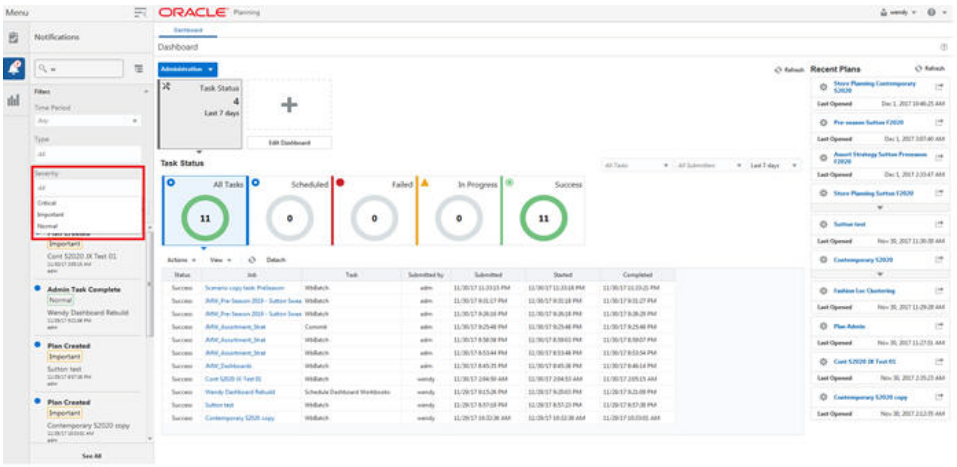
3. Select a Type filter option.

Figure 6–9 Type Filter Options



4. Select a Severity filter option.

Figure 6–10 Severity Filter Options



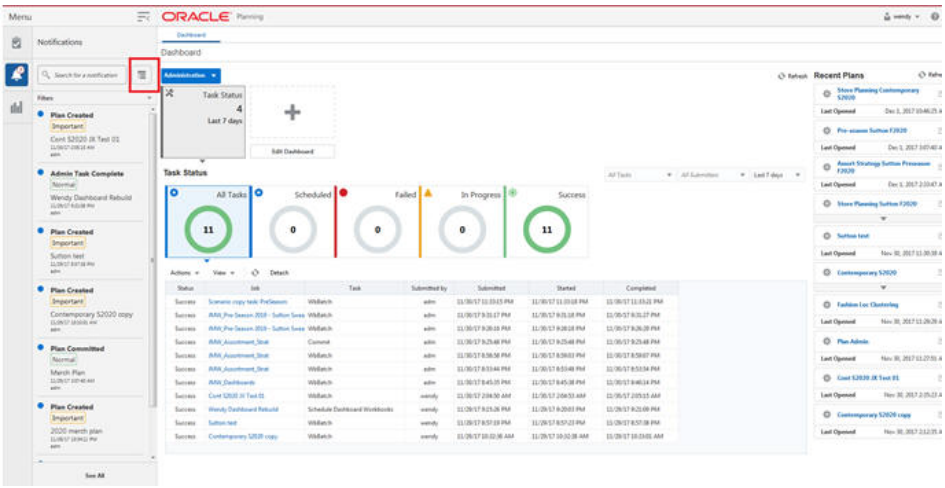
5. After you have selected the filter options, you can use **Reset** to clear the filter options, **OK** to apply the filter criteria and close the options selector, or **Cancel** to close the options selector without applying the filters.

Group Notifications

To define group notifications, complete the following steps:

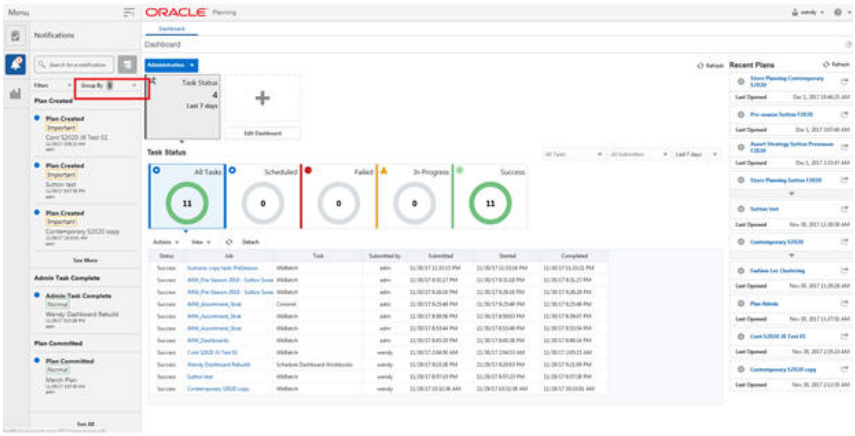
1. To open the Group By dialog box, click **Group View** from the Notifications module.

Figure 6–11 Group View



You can view the group view next to the filters.

Figure 6–12 View Group View



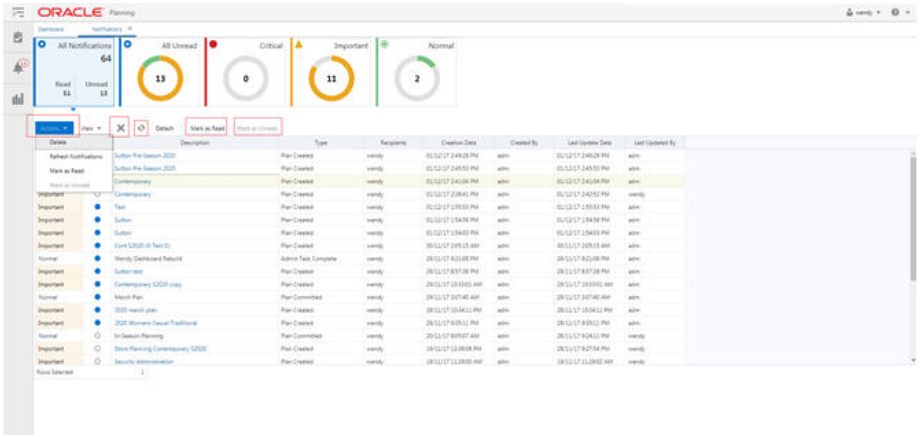
2. To group by type, use the options Department, Class, Subclass, Location, Supplier, Performance, Brand, Rollup Count. and Additional Information.
3. To group by then by, use the options No Selection, Department, Class, Subclass, Location, Supplier, Performance, Brand, Rollup Count, and Additional Information.

Notifications Tab

When you click **See All** in the Notifications Drawer, it opens a Notifications tab. The Notifications tab lists all notifications, all unread notifications, critical, important, and normal notifications. You can select the desired tile to view the indicated notifications.

The actions that can be performed on the list of Notifications are Mark a notification as Read, Mark a Notification as Unread, Delete a Notification, and Refresh the Notifications list. You can perform these actions either by clicking the **Actions** menu and then the desired event or by directly clicking the shortcut buttons available.

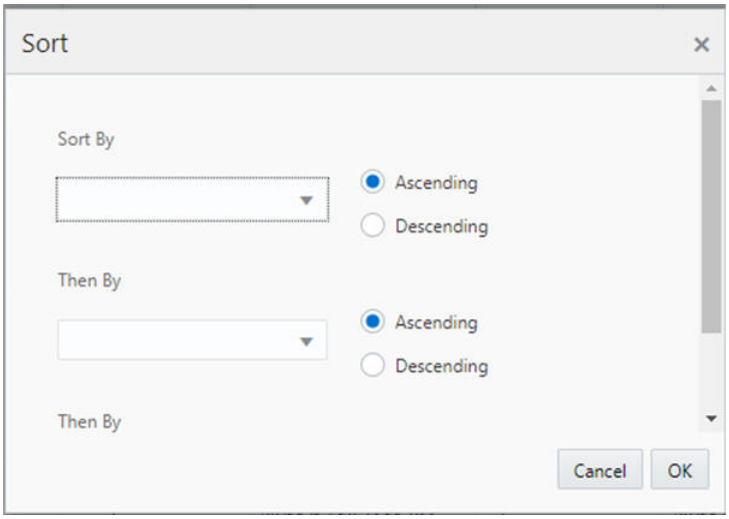
Figure 6–13 Notifications Tab Actions



You can also Detach the Notifications list table for more visibility. Click **Detach** or click **View Menu -> Detach**.

Sort the notifications list by clicking **View Menu -> Sort**. It opens a Sort dialog box where you can enter Sort By, Then By and Then By to sort your notifications list. Sort can be performed in Ascending or Descending on each option.

Figure 6–14 Sort Notifications



Snackbar Notifications

When an activity is started, changed, or completed, you see a Snackbar notification at the bottom or top right of the screen that informs you of the activity or status. Table 6–2 lists all Snackbar notifications.

Table 6–2 Snackbar Notifications

Notification	Description
Plan creation initiated	[Plan] is being prepared. You will receive a notification when this is complete.
Plan opened	[Plan] opened.
Plan renamed	[Plan] has been renamed to [Plan]
Plan deleted	[Plan] has been deleted
Calculate successful	Calculation complete for [Plan]
Nothing to calculate	Nothing to Calculate in [Plan].
Refresh successful	Refresh Complete for [Plan].
Seed successful	[Plan] seeded successfully.
Seed failed	[Plan] was not seeded. Contact your administrator to verify the seed source is valid.
Admin task submitted	[Task] has been submitted. You will receive a notification when this is complete.
Plan tab/window closed	[Plan] closed.

7

Editing Views

You can view data in RPASCE in various ways. Changing the level, amount, and layout can make it easier for you to complete certain activities and tasks. For example, a manager might want to view data at a higher level of the product dimension, while a planner can work at a lower level of the dimension to complete necessary tasks. You make these view changes in Edit View.

Launching Edit View

To open Edit View, click any of the following places. If you click any of the dimension tiles in the Details tab of the Edit View window, you launch Edit View. Any other way launches the Setup tab of the Edit View window.

- Edit button on the View Title Bar
- Edit button on the dimension tiles in an open view
- Edit button on a view tile in the View Management Drawer
- Edit button on the Detached view
- Adding a new view in the View Management Drawer

Figure 7–1 Launching Edit View

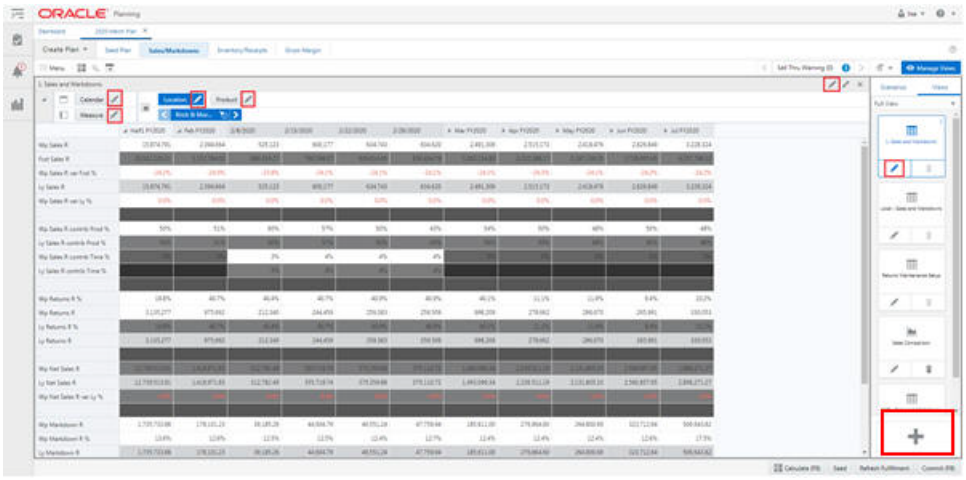
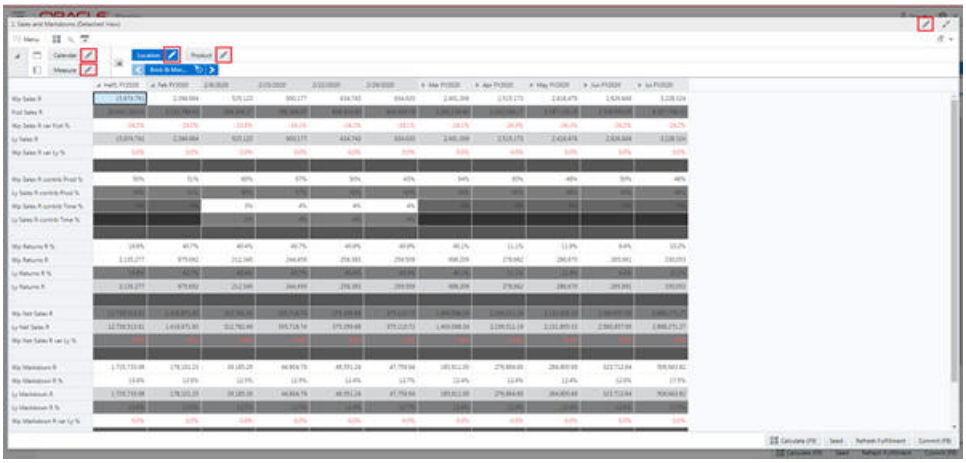


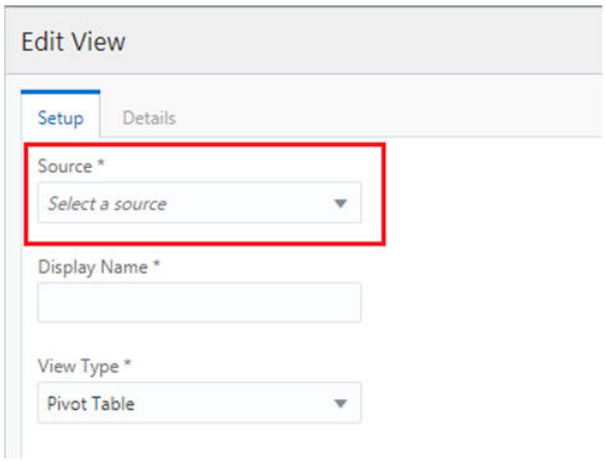
Figure 7–2 Launching Edit View from the Detach View



Source

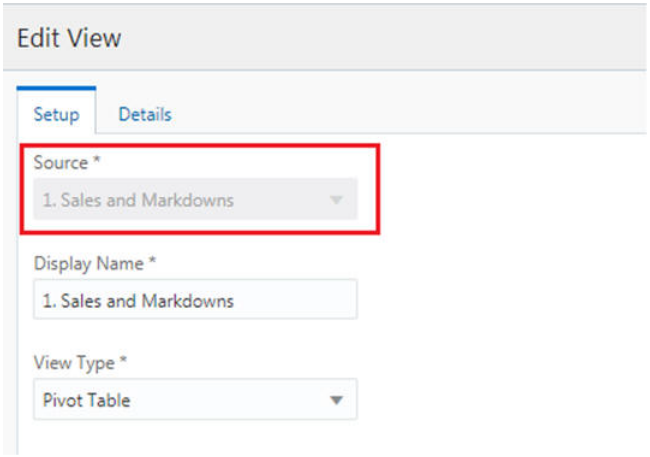
You can choose the source for the view that you want to add using the View Management drawer.

Figure 7–3 Select Source in Edit View While Adding a New View



Any other way of lunching edit view except Add View displays the source as an uneditable field. You will not be able to change the source of a view.

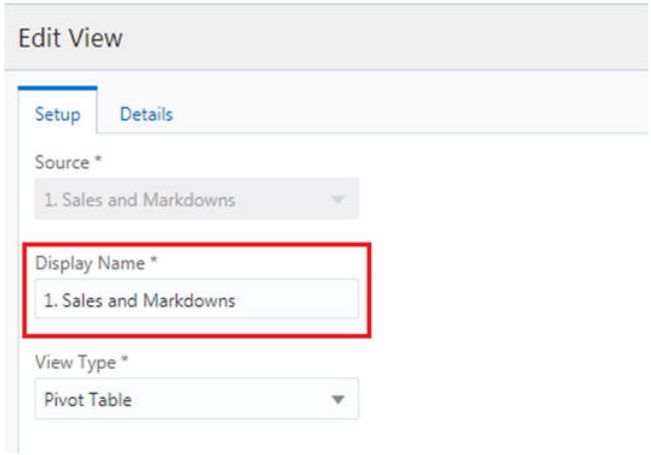
Figure 7–4 Display Source in Edit View While Editing an Existing View



Display Name

You can change the view display name using the Edit View as shown in Figure 7–5. You must be in the Setup tab of Edit View to complete this action.

Figure 7–5 Display Name in Edit View



View Type

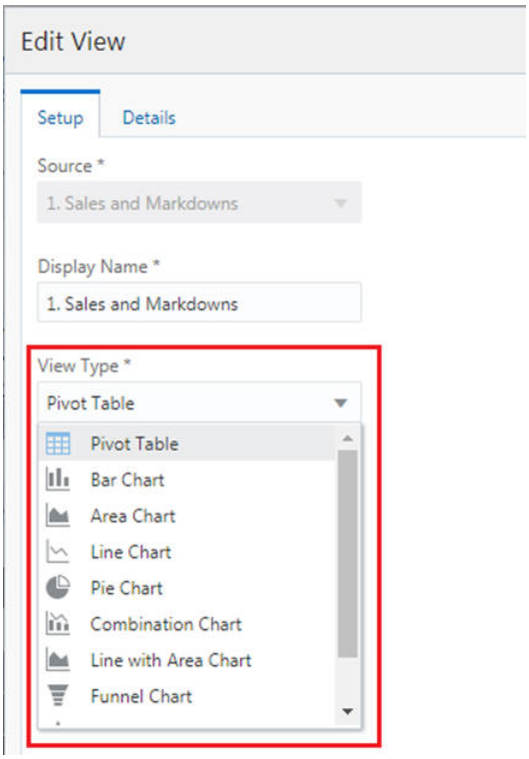
You can change the view type using the Edit View as shown Figure 7–6. You must be in the Setup tab of Edit View to complete this action.

The following view types can be changed.

- Pivot Table
- Bar Chart
- Area Chart
- Line Chart
- Pie Chart
- Combination Chart
- Line with Area Chart

- Funnel Chart
- Pyramid Chart
- Polar Chart

Figure 7–6 View Type in Edit View

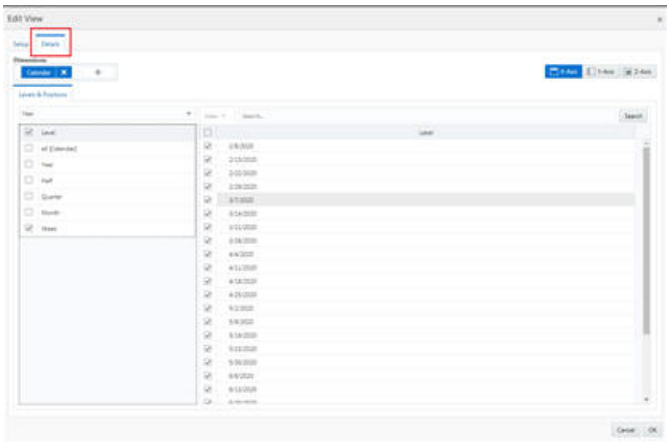


Moving and Re-Ordering Dimension Tiles

To move and re-order dimension tiles, complete the following steps:

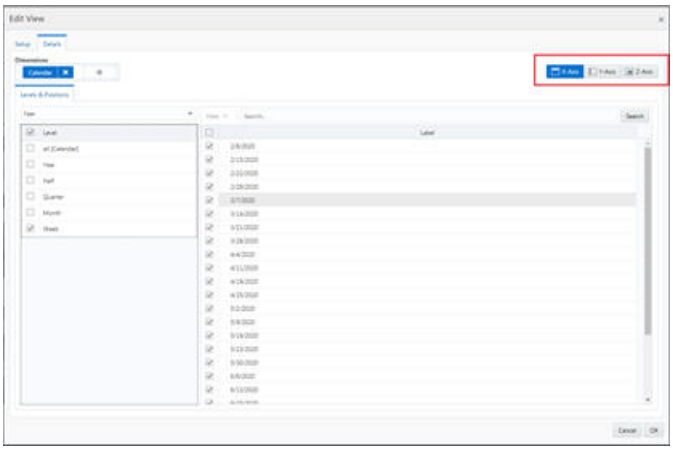
1. Once Edit View is open, click the **Details** tab to see the different dimensions, axes, levels, positions, and measures.

Figure 7–7 Edit View Details



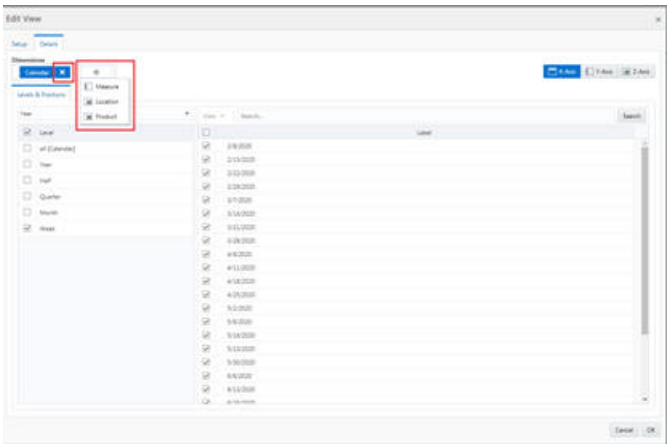
2. To view the contents of each axis, click the different **Axis Toggle** buttons in the top right.

Figure 7–8 Axis Toggle



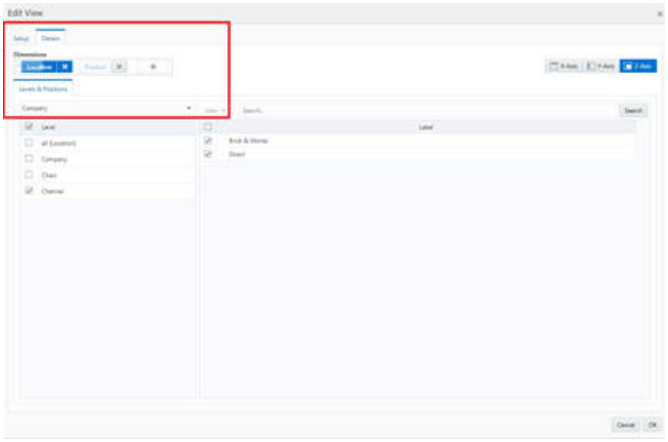
3. Once you have the correct axis displayed, use the **X** button or the **Plus** button in the Dimension Tiles area to remove or add a dimension to that axis.

Figure 7–9 Correct Axis



4. You can also re-order the dimensions by dragging and dropping the dimension tiles next to another tile or swapping tiles with one another.

Figure 7–10 Re-Order Dimensions



Changing Data Display

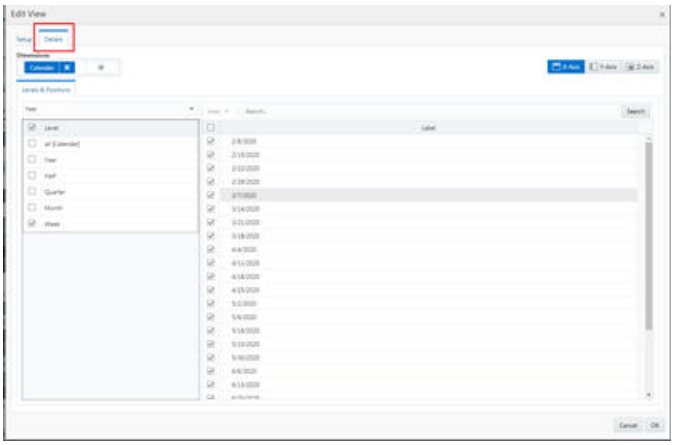
Use Edit View to change the data shown at each level in a view.

Branch Selection - Alternate Hierarchies

You can view alternate branches of the hierarchy or dimension by using the Branch Selector drop-down list. When you select a different branch in the drop-down list, you notice that different dimensions are in the Levels and Dimensions area.

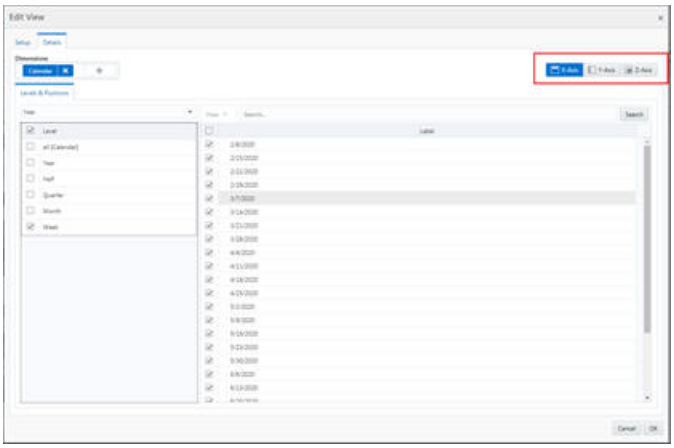
1. Once Edit View is open, click the **Details** tab to see the different dimensions, axes, levels, positions, and measures.

Figure 7–11 Open Details Tab



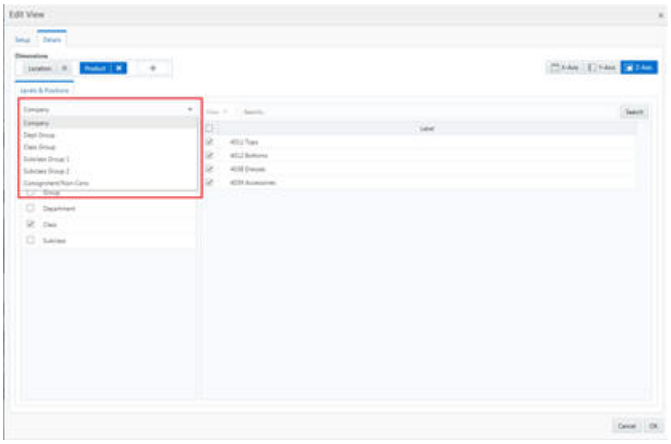
2. To view the contents of each axis, click the different **Axis Toggle** buttons in the top right.

Figure 7–12 Axis Contents



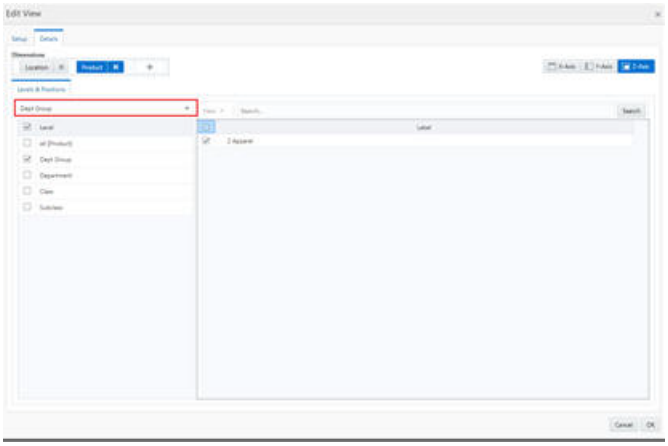
3. Click the **Branch Selector** drop-down list in the Levels and Positions area to see the different branch options (Company vs Department Group).

Figure 7–13 Branch Options (Company vs Department Group)



4. When you select a different branch, you see different dimension levels that you can choose from in the Levels and Positions area.

Figure 7–14 Levels and Positions

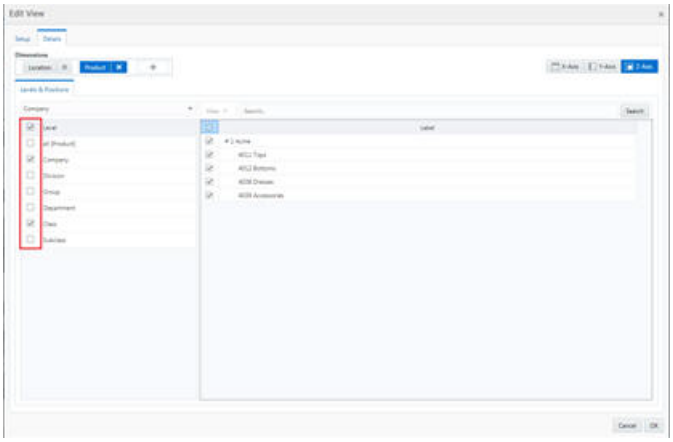


Showing and Hiding Levels

To show or hide levels, complete the following steps:

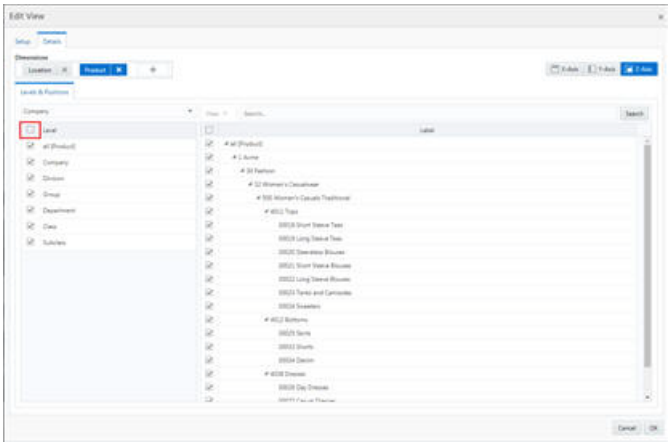
1. Open the **Details** tab in Edit View.
2. Select or unselect the boxes to the left of the levels to change the visible levels.

Figure 7–15 Show Hide



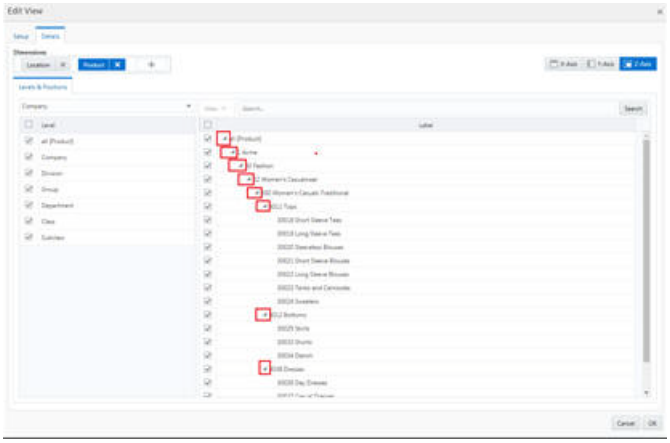
3. To select all or unselect all, click the box at the top of the levels.

Figure 7–16 Top Level



4. Once the level has been selected in the left panel, click the **Expand** button next to the different positions in the right panel to expand or contract the levels.

Figure 7–17 Expand and Collapse Levels



Displaying Individual Data

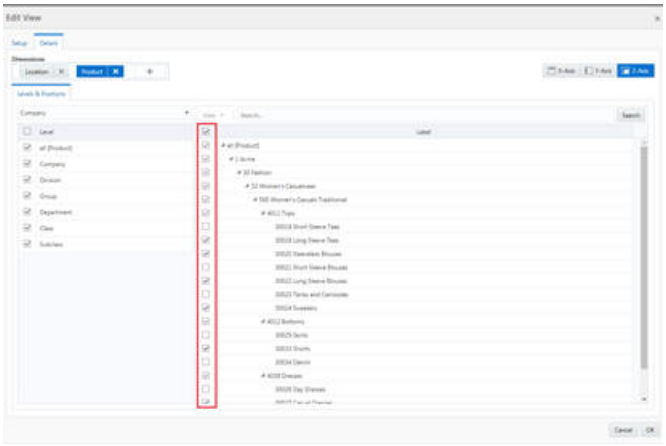
This section provides details about individual data display.

Showing and Hiding Positions

Once Edit View is open to the Details tab, you can show and hide positions in the view.

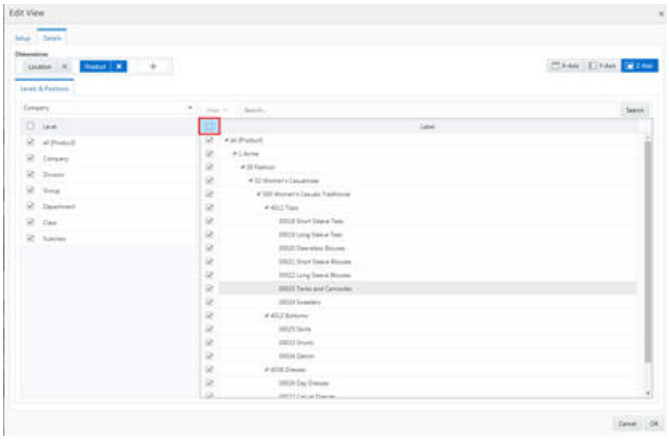
1. Select or unselect the boxes to the left of the positions to change the visible positions.

Figure 7–18 Change Visible Positions



2. To select all or unselect all, click the box at the top of the positions.

Figure 7–19 All Positions



Measure Profiles

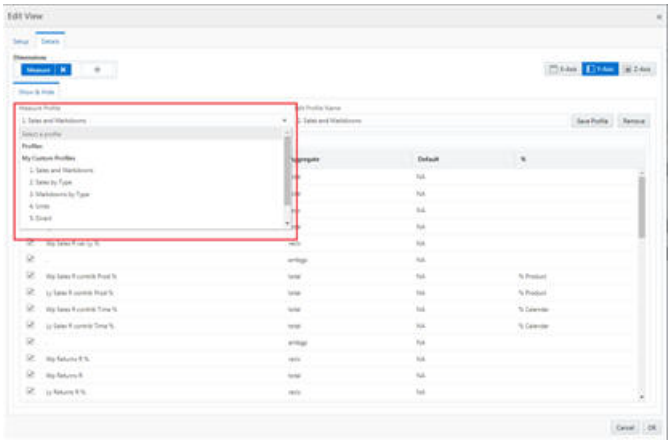
Measure profiles are customized groups of measures that you can create and use in views. Instead of adding or removing measures from the default measure list each time you work with a particular view, you can save that customized group of measures as a measure profile and load it into the view. By creating a measure profile for each set of measures that you frequently use, you reduce the amount of time it takes to set up 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 Chapter 10, "Formatting.".

Application-Defined Measure Profiles

Application-defined measure profiles are configured with the base application and cannot be edited or deleted. If you make a change to the selected measures, the profile cannot be saved as the original profile name, but can be saved with a new name. These profiles are listed in the Profiles drop-down list in the Profiles section.

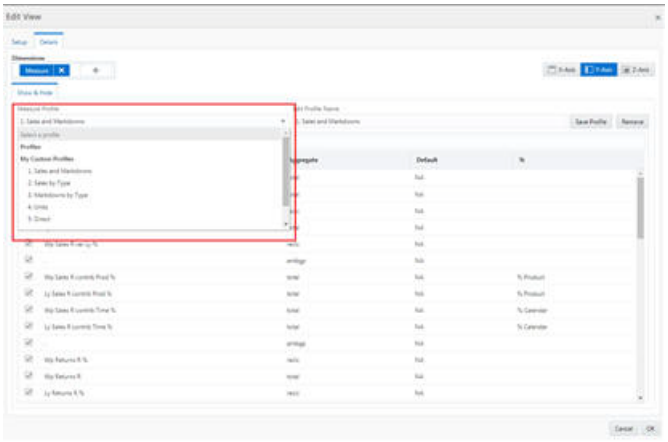
Figure 7–20 Application-Defined Measure Profiles



User-Defined Measure Profiles

If you generally only work with certain measures, you can create a user-defined measure profile by saving a measure profile. These profiles are usually created by starting with an application-defined or user-defined measure profile, updating the selected measures as needed, and saving the measure profile with a different name. They are listed in the Profiles drop-down list in the My Custom Profiles section, and they can be deleted.

Figure 7–21 User-Defined Measure Profiles

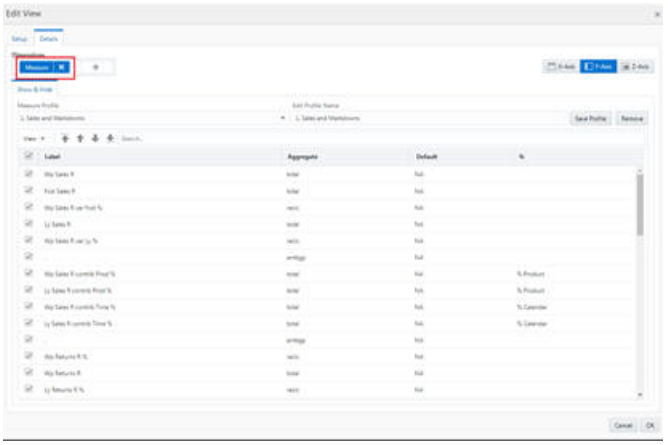


Creating, Editing, and Deleting Measure Profiles

To create, edit, or delete a measure profile, complete the following steps:

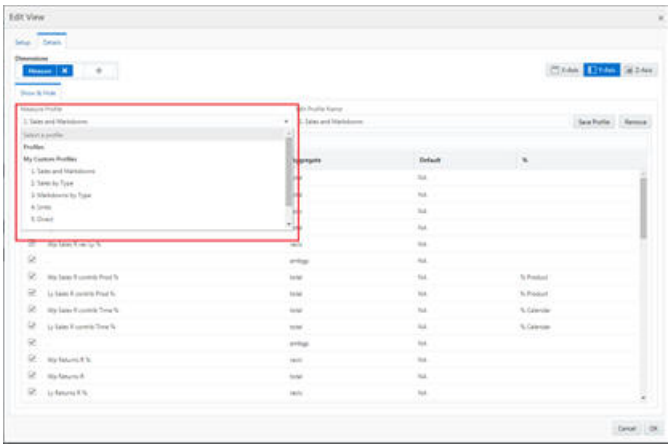
1. Open Edit View and then go to the Measures Dimension Tile.

Figure 7–22 Measure Profile



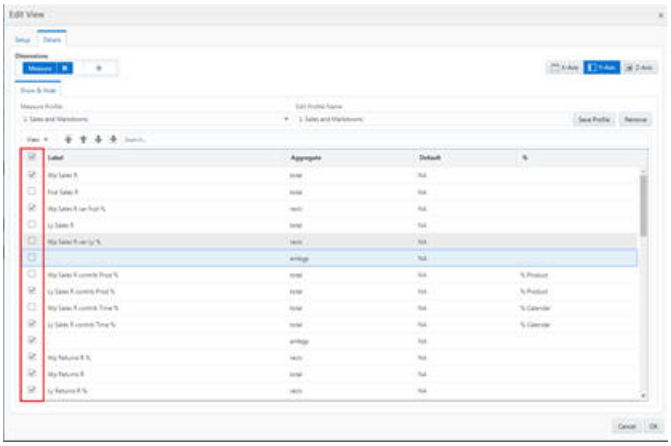
2. To create a new measure profile, first open any of the existing measure profiles from the Measure Profile drop-down list.

Figure 7–23 New Measure Profile



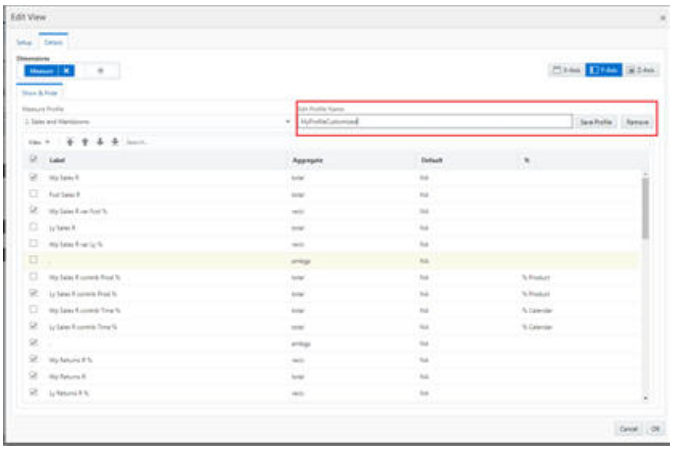
3. Add and remove desired measures by selecting and unselecting the measures.

Figure 7–24 Add and Remove Measures



4. Type a profile name in the Edit Profile Name text box and click **Save Profile**.

Figure 7–25 Save Profile

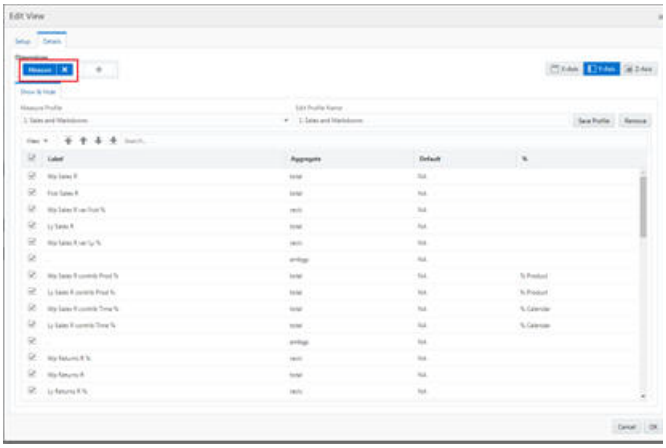


Searching for a Measure

To search for a measure in Edit View, complete the following steps:

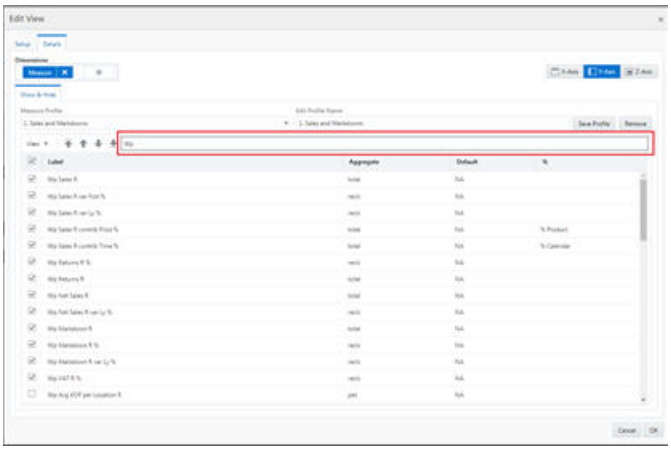
1. Click the axis that contains the Measure Dimension.

Figure 7–26 Axis Measure Dimension



2. Type into the search box in the middle of the screen. As you type, the matching measures is listed, and you can select and unselect the desired measures.

Figure 7–27 Search for Measure



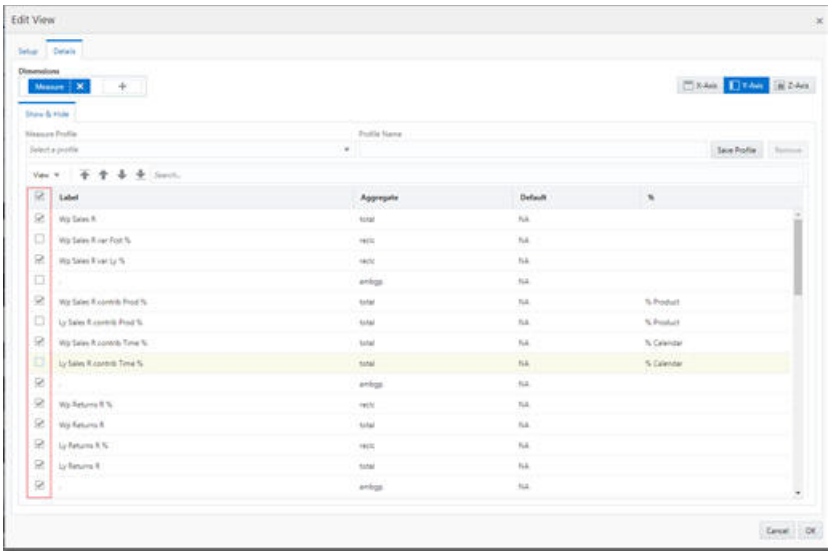
Showing, Hiding, and Reordering Measures

Measures that appear in the view are based on the configuration, and only measures configured for a view are visible in the view. You can show, hide, or reorder the measures using Edit Measure.

To show or hide measures, complete the following steps:

1. Click the axis that contains the Measure Dimension
2. You can show or hide particular measures by selecting or unselecting the icons next to each measure label, as shown in Figure 7–28.

Figure 7–28 Icons Next to the Measure Label



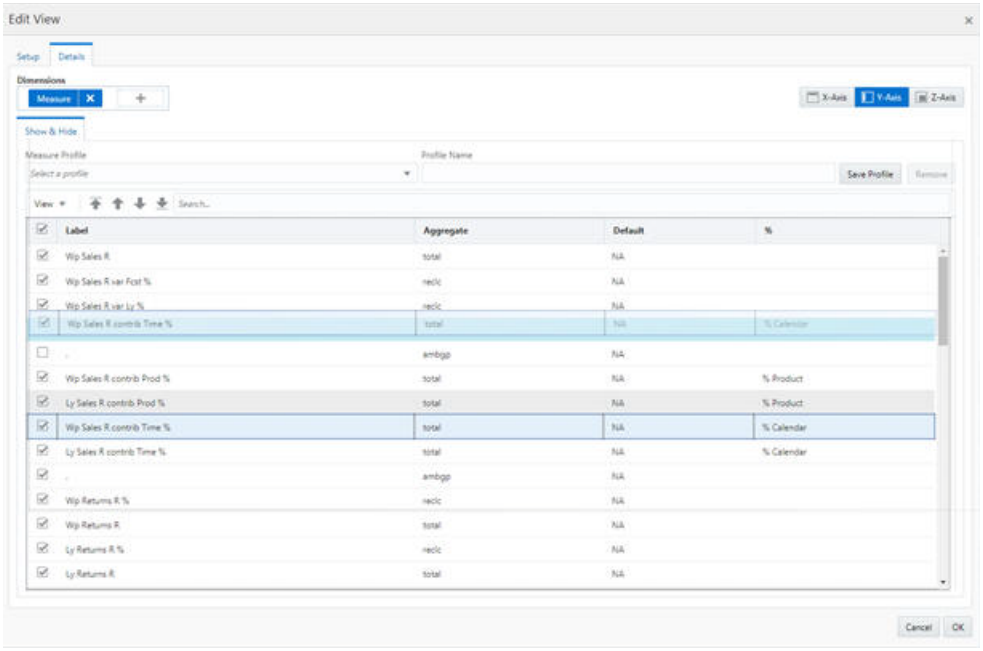
3. You can also show or hide all measures by selecting or unselecting the icon in the header, beneath the View menu.

To reorder measures, complete the following steps:

1. Select a measure row and then drag and drop the row to a new location. In the following example, the measure row DAmR has been selected and then dragged to a new position, between BOR and DminR.

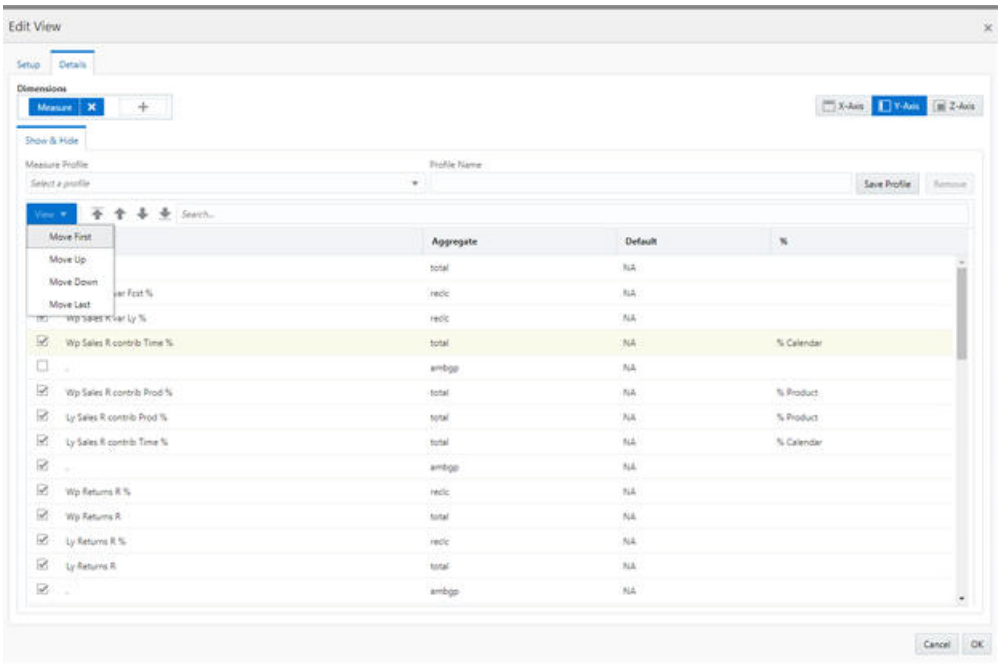
> **Note:** Dragging a selected row near the bottom of the table causes the table to scroll downward while in drag mode. Dragging a selected row toward the top of the table scrolls the table upward while in drag mode.

Figure 7–29 Reorder Measure



2. You can also select a measure row and then use the View menu to reposition the selected measure row. In the following example, DAmR has been selected. Selecting the Move Down option from the View menu causes the measure to be moved below DminR. Options allow you to move a selected measure row to the first position (absolute top of the table), bottom position (absolute bottom of the table), or one up or one down relative to the selected position.

Figure 7–30 Reorder View



Note: Multiple measure rows can be selected by click-dragging over multiple measure rows in the table or by first selecting a measure row and then shift-clicking to select multiple other rows or using Ctrl-clicking for discontinuous selections. Once multiple measure rows are selected, the block of rows can either be dragged and dropped to a new location, or the View menu can be used to reposition the block of rows.

8

Views

The view area includes the multidimensional pivot table or chart that displays information for the relevant task. Each task may include more than one view, and each view can appear in the contents area. The information in the view is organized based on the dimension positions set up at the *x*, *y*, and *z* axes.

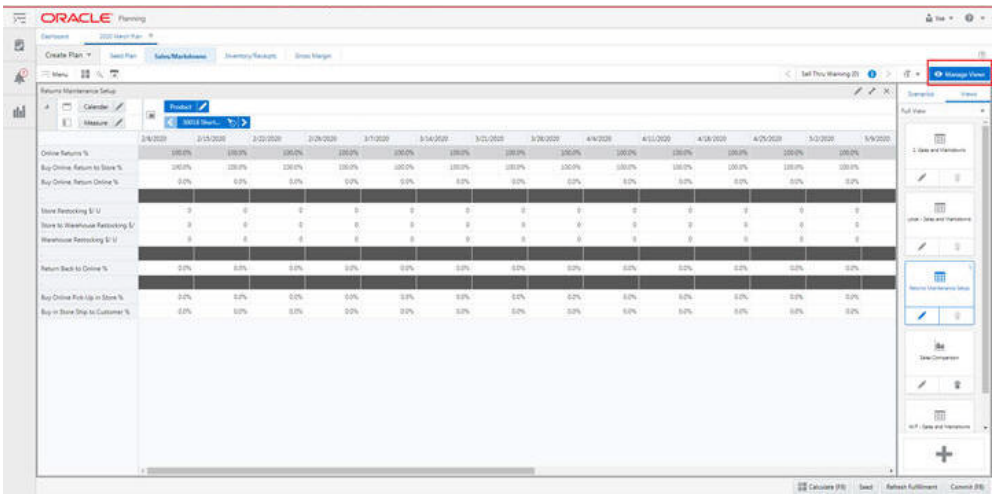
RPASCE is designed to help you to work with the data within the view. You can manage the way the information is presented in a view. You can arrange and present the information in a layout the way you want by rotating or pivoting dimensions across the axes, changing the data roll ups, or showing or hiding measures. You can view the information at a low level of detail or aggregate to view the information at summary levels. For more information, see Chapter 7, "Editing Views.".

You can also choose to present the information in many types of charts using the charting functionality.

View Management Drawer

Use the View Management Drawer to select the visible views, add new views, modify or delete an existing view, and change the view layout. Click **Manage Views** to show or hide the View Management Drawer.

Figure 8–1 Manage Views



Layouts

You can display one, two horizontal, two vertical, or four views at one time to help you complete an activity. Click the View Layout drop-down list to control the layout.

Figure 8–2 Full View

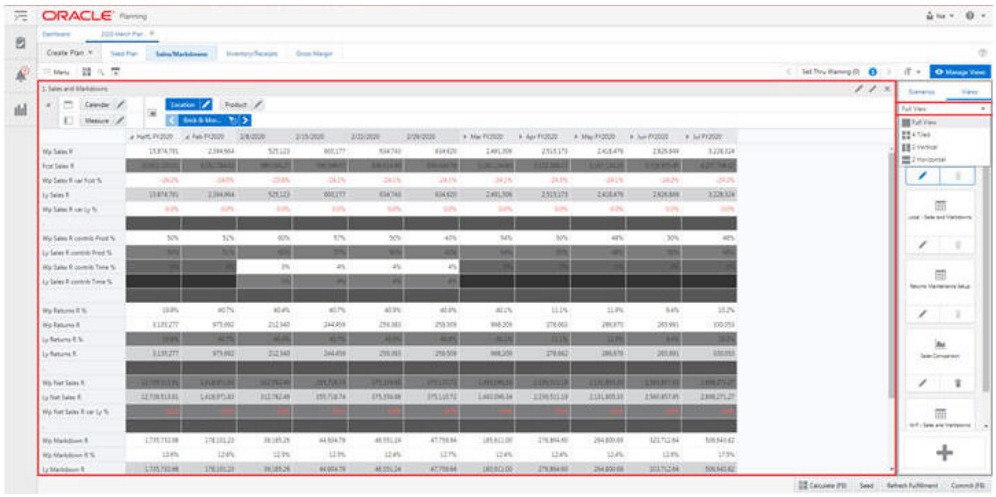


Figure 8–3 Four-Tile View

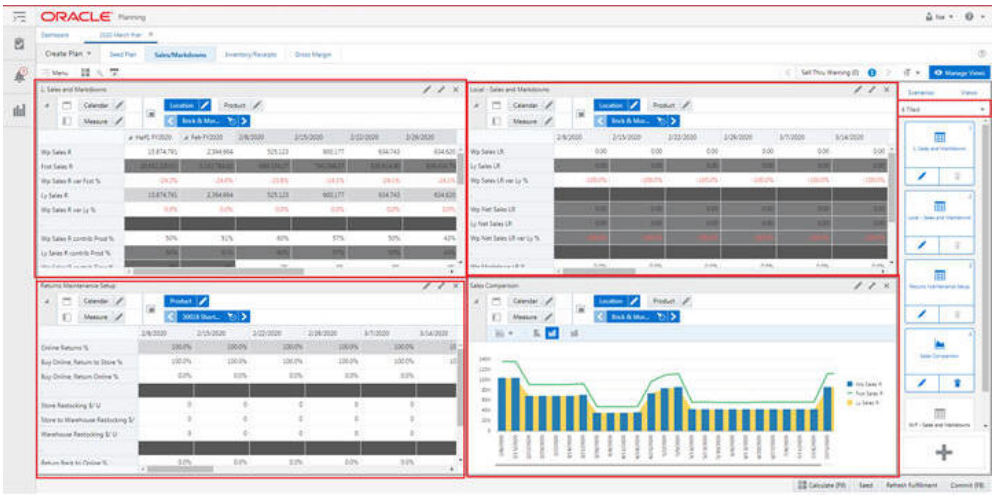


Figure 8–4 Two Vertical View

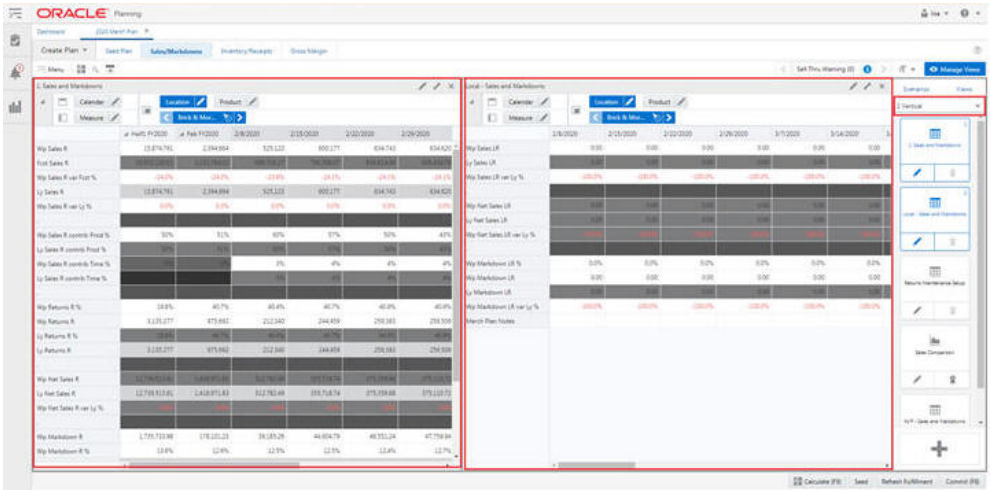
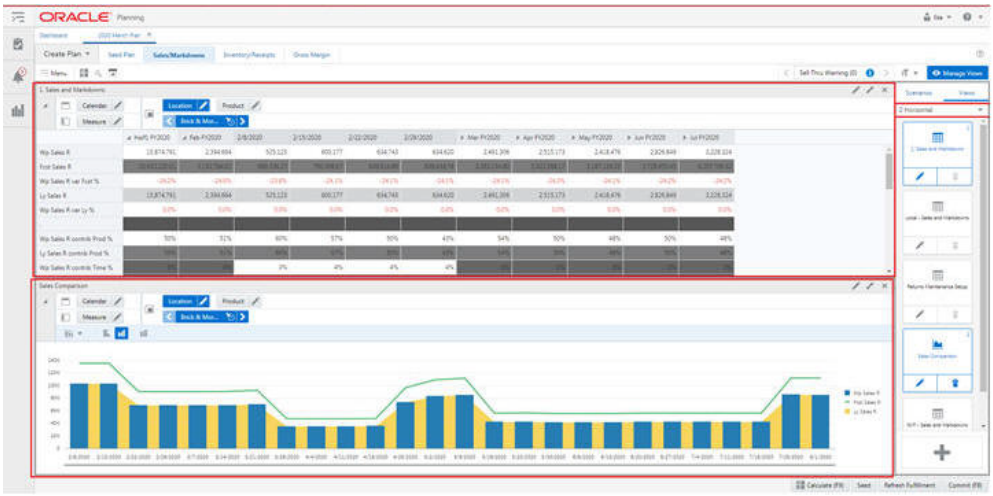


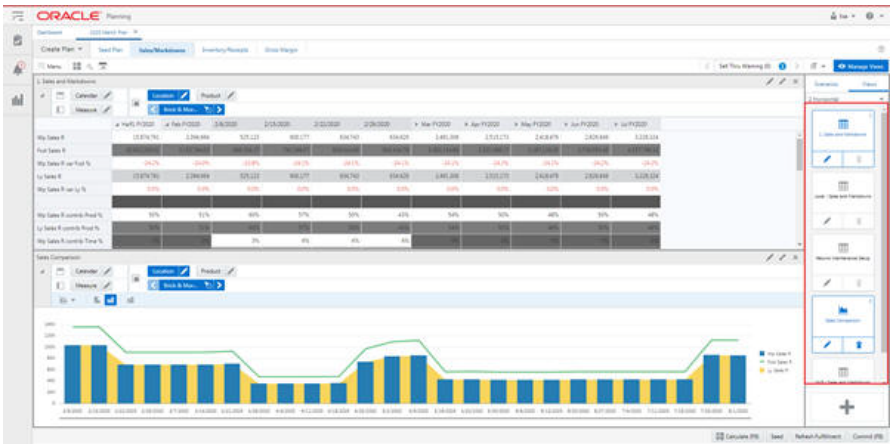
Figure 8–5 Two Horizontal View



View List

The available views are listed on the right side of the screen in the View Management Drawer, as shown in Figure 8–6.

Figure 8–6 View List

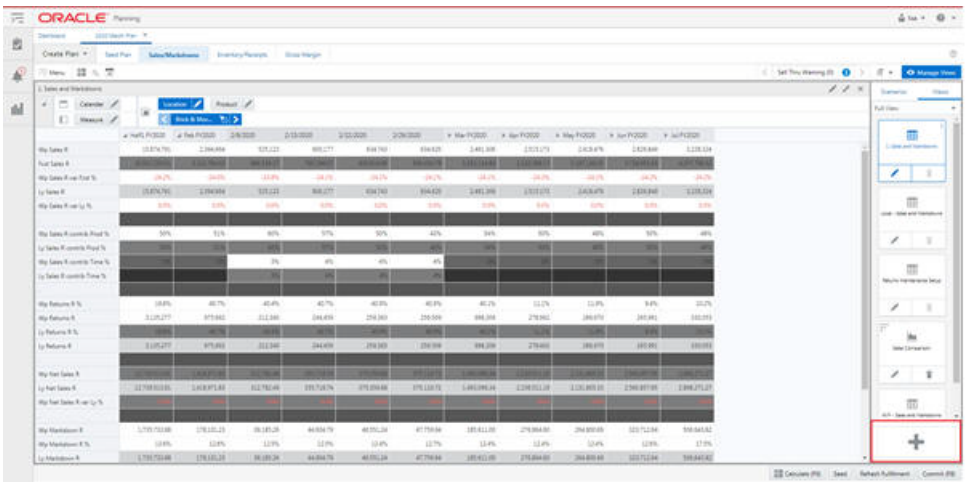


Creating a View

You can create a new view containing a new selection of measures in the form of a pivot table or many chart views.

1. To create a new view, click **Plus in the View Management Drawer**.

Figure 8–7 Creating a View



2. In Edit View, on the Setup tab, select a Source from the drop-down list. The options are limited to the other existing views in the View Management Drawer.

Figure 8–8 Edit View

3. Enter a Display Name. If creating a chart view, consider using a similar name to the source view.

Figure 8–9 Display Name

4. Select the type of view to be created, such as Pivot Table, Line Chart, Pie Chart, and so on.

Figure 8–10 Type of View

5. In the Edit View dialog box, on the Details tab, you can do the following:
   - Assign dimensions to the *x*, *y*, and *z* axes
   - Select the levels and positions for the Calendar, Product, and Location Dimensions
   - Select the measures for the Measure Dimension

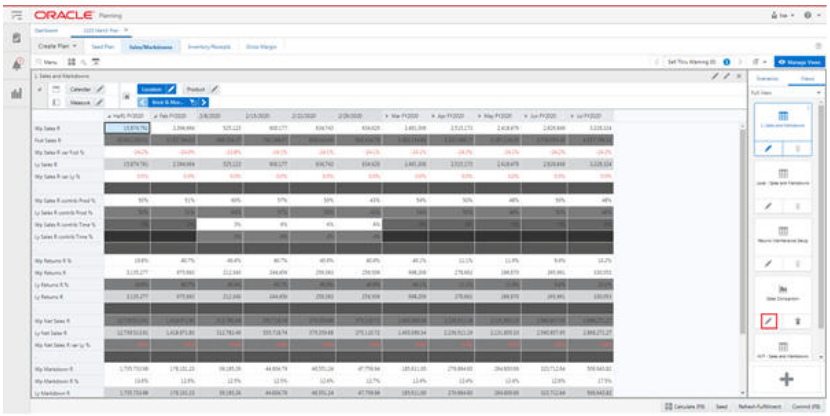
   For more information on how to perform above steps, see Chapter 7, "Editing Views.".

Modifying a View

To modify a view, complete the following steps:

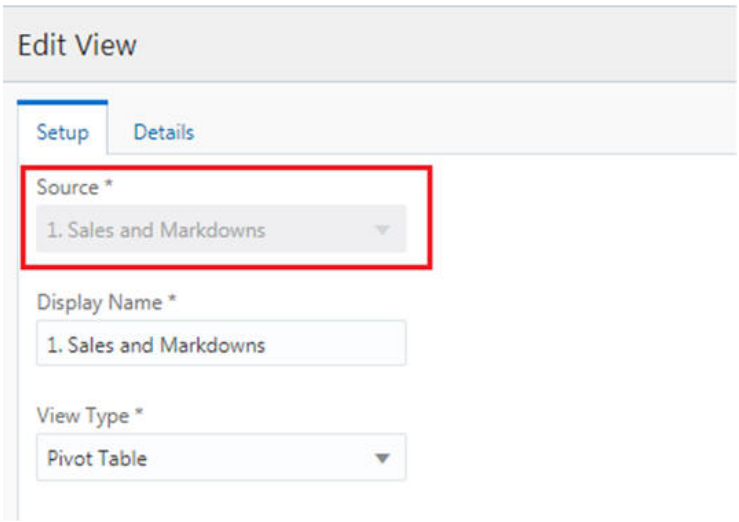
1. Click **Edit** on the View tile in the View Management Drawer.

Figure 8–11 Modifying a View



2. Follow the same steps as in "Creating a View", excluding selecting a Source. Since the view has already been created, the Source drop-down list is grayed out.

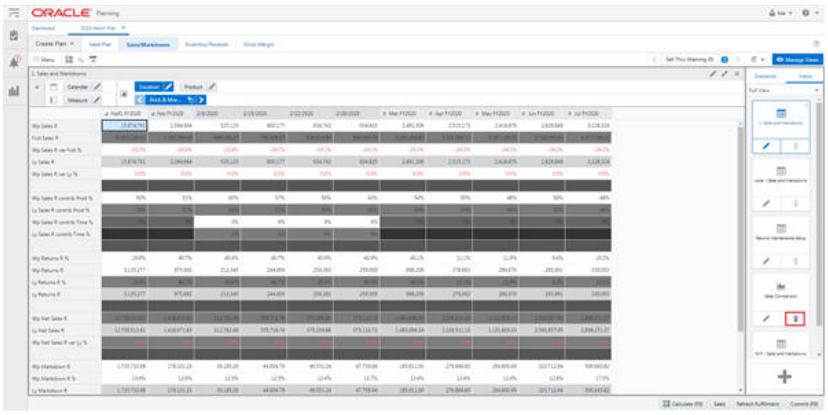
Figure 8–12 Edit View



Deleting a View

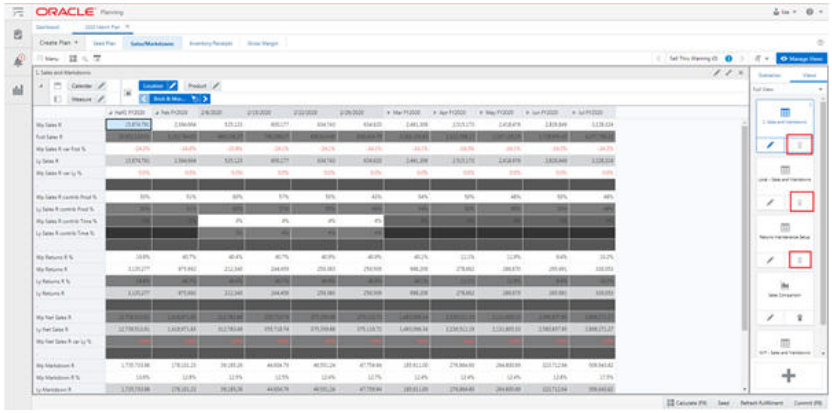
To delete a view from the View Management Drawer, click **Delete** on the View in the View Management Drawer.

Figure 8–13 Deleting a View



You cannot delete the views defined in the system task flow. For such views, the Delete icon is disabled.

Figure 8–14 Disabled Delete Option



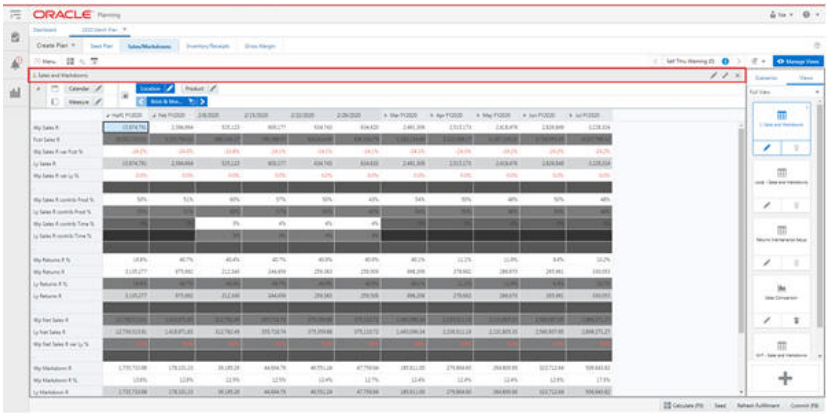
Working with Views

Views are associated with each step within the business workflow. Views are displayed as a spreadsheet-like or a chart type with the multidimensional data selected at the dimension levels in Edit view. Each view includes a set of measures relevant to the step that help you view and analyze information, and make decisions.

View Title Bar

The View Title Bar contains the name of the view being displayed and the buttons for Edit, Expand, and Close.

Figure 8–15 View Title Bar

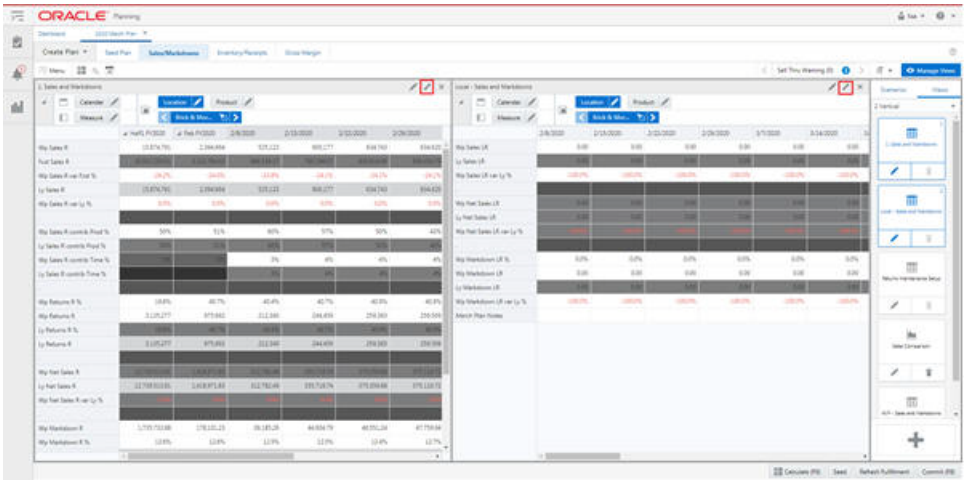


The Edit button opens the Edit View dialog box where you can change the view name, change the view type, rearrange the axes, modify the dimension levels, choose the measure profile, add or remove measures, hide and unhide positions, and so on. For more information on how to perform above steps, see Chapter 7, "Editing Views."

Figure 8–16 Edit View Dialog Box

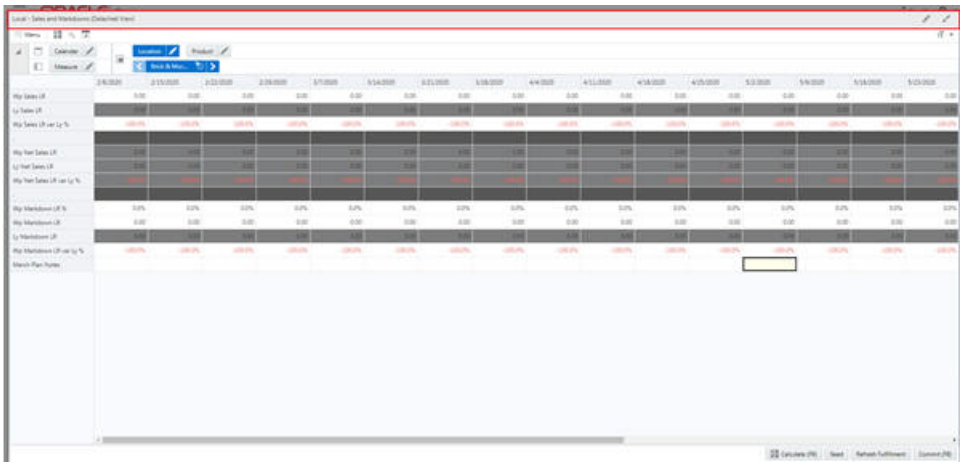
The Expand button maximizes and detaches the view.

Figure 8–17 Maximized View



The detached view has Edit and Collapse.

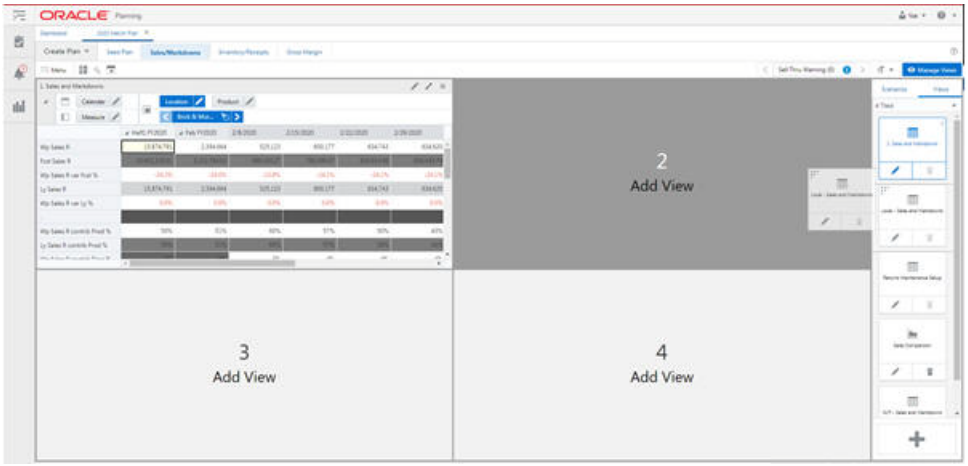
Figure 8–18 Detached View



Adding a View to a Layout

To add a view to a layout, drag the view from the View Management Drawer to a location on the layout. If the layout is 4 Tiled, 2 Horizontal, or 2 Vertical, you can drag multiple views to the different locations on the layout.

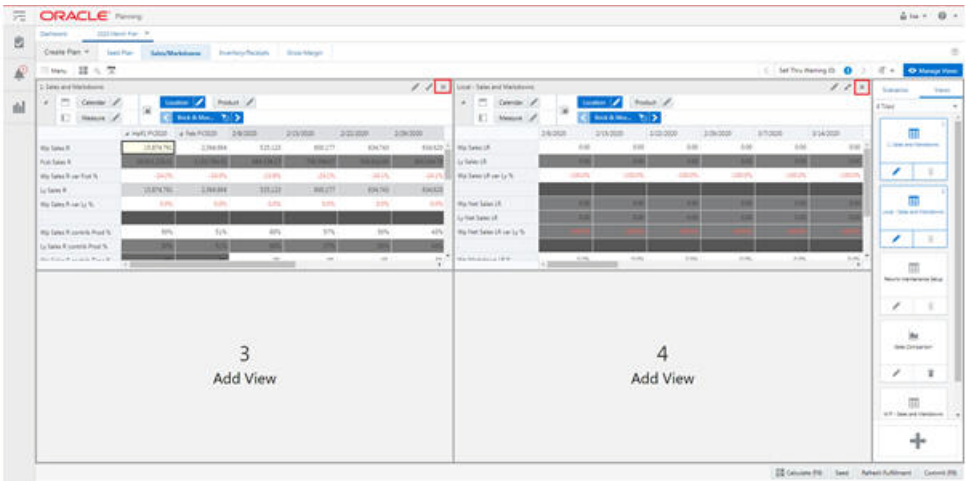
Figure 8–19 Adding a View to a Layout



Removing a View from a Layout

To remove a view from a layout, click the **X** in the upper right corner of the view.

Figure 8–20 Removing a View from a Layout

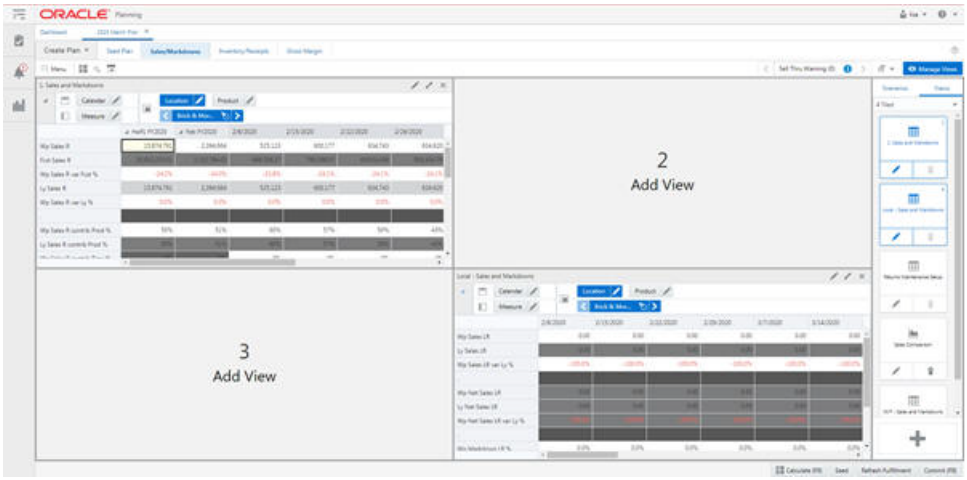


Moving a View

If a view is already displayed in the layout, drag that view from the View Management Drawer to any different location in the layout, then left click the location to drop the view.

In the example shown in Figure 8–21, to move the view Local - Sales and Markdowns from layout location 2 to layout location 4, drag the view Local - Sales and Markdowns from the View Management Drawer to layout location 4.

Figure 8–21 Moving a View

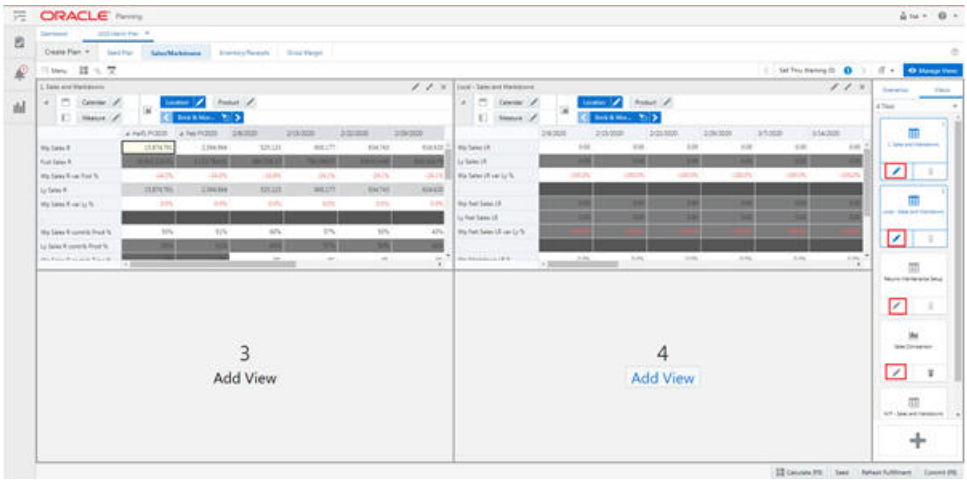


Renaming a View

A view can be renamed in the Edit View dialog box.

1. Click **Edit** to open the Edit View dialog box.

Figure 8–22 Renaming a View



2. Change the Display Name and click **OK** to rename the view.

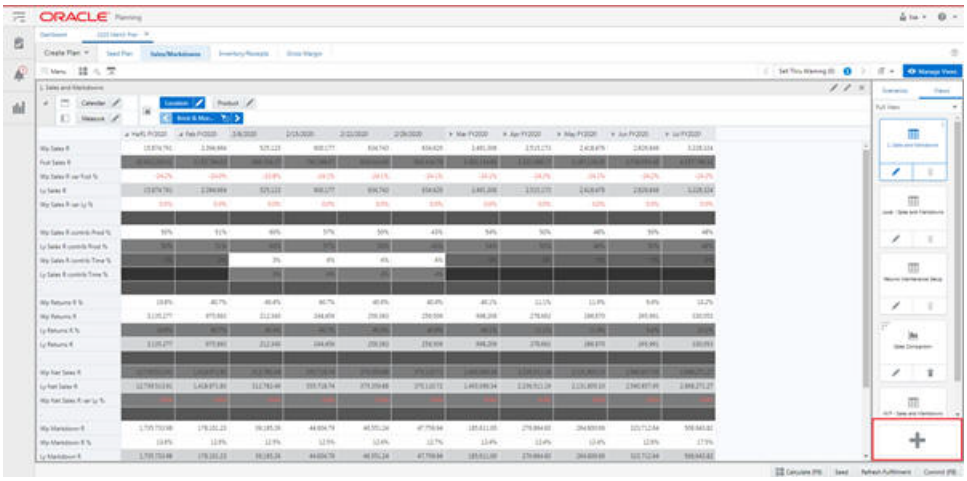
Figure 8–23 Change the Display Name

Copying a View

To make a copy of a view, you can create a new view and use the original view as the source.

1. Click **Plus** to open Edit View.

Figure 8–24 Copying a View



2. In the Source drop-down list, select the view to make a copy of. Complete the rest of the required fields.

Figure 8–25 Select View

Synchronize Z-Axis Scrolling

Synchronized Z Axis scrolling lets you simultaneously scroll through the *z* axis of multiple views. When synchronized Z Axis 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 scrolling is disabled, scrolling through slice positions in one view does not affect the slice position display of other views.

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

To enable synchronized Z Axis scrolling, click **Synchronize Z Axis** in the Z Axis and Dimension Tiles area, as shown in Figure 8–26 and Figure 8–27.

Figure 8–26 Before Page Edge Synchronization

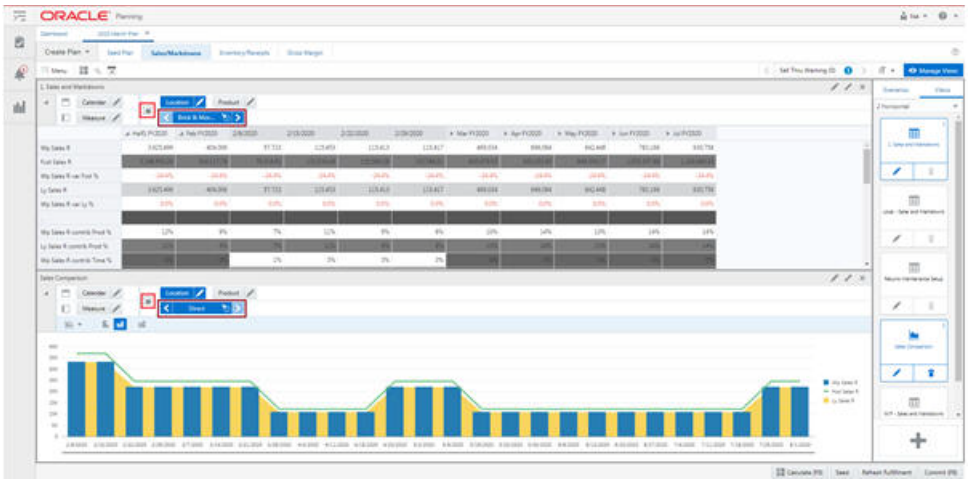
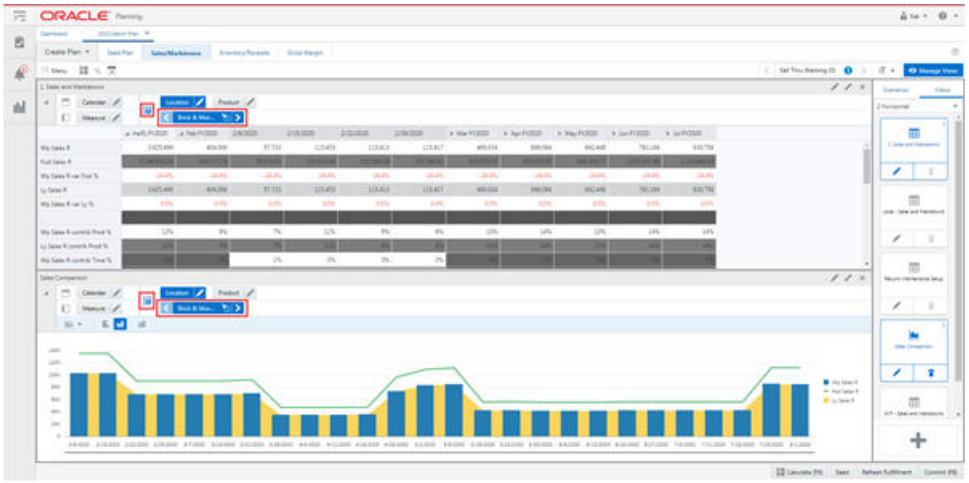
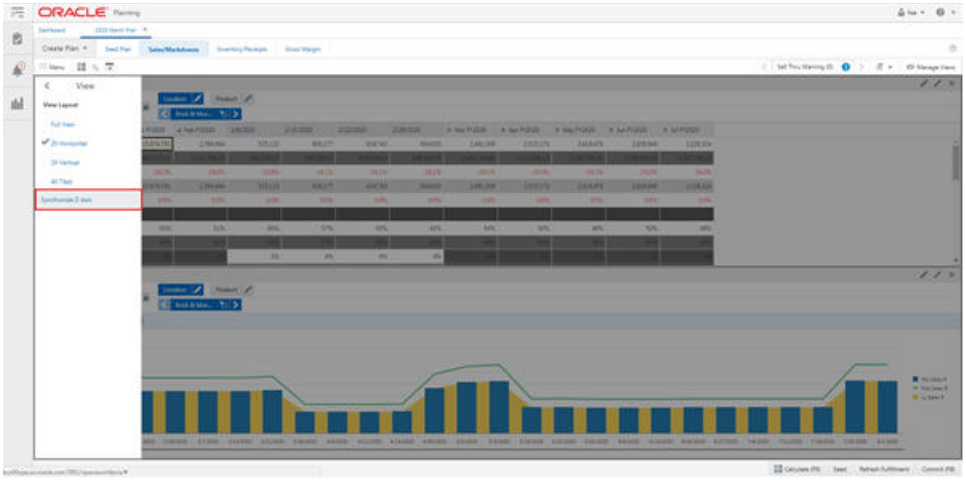


Figure 8–27 Enabling Z-Axis Synchronization



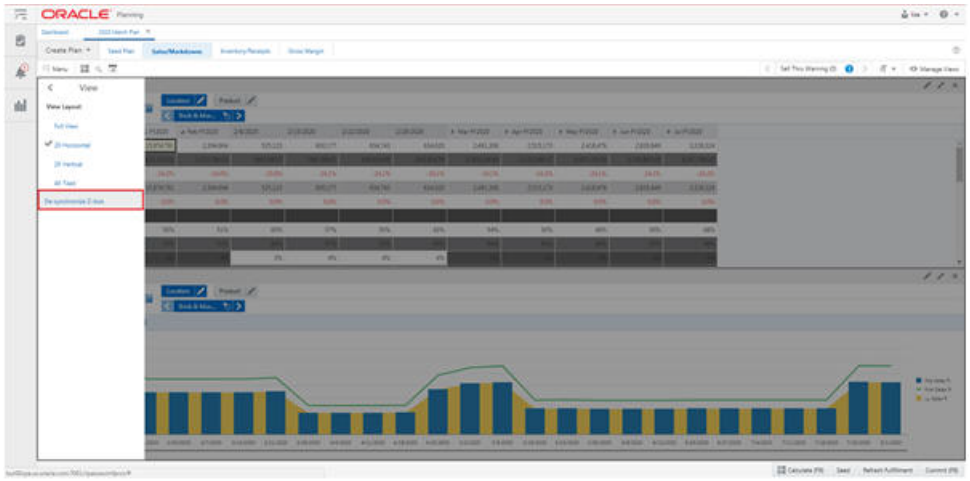
You can also Enable Synchronize Z-Axis by clicking on Menu -> View -> Synchronize Z-Axis, as shown in Figure 8–28.

Figure 8–28 Synchronize Z-Axis from View Menu



You can also Disable Synchronize Z-Axis by clicking on Menu -> View -> De-Synchronize Z-Axis, as shown in Figure 8–29.

Figure 8–29 Desynchronize Z-Axis from View Menu



9

Charts

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

Viewing Charts

If a chart view exists in the View Management Drawer, you can drag the view to the content area to view it. This action is similar to dragging the views from the View management drawer to the content area for viewing.

You can view the existing chart views in the Full View, 2-Hortizontal View, 2-Vertical View, or 4-View layout. You can also create a new view with View type as chart.

You can view the chart in the Full view mode.

Figure 9–1 Chart in Full View Mode

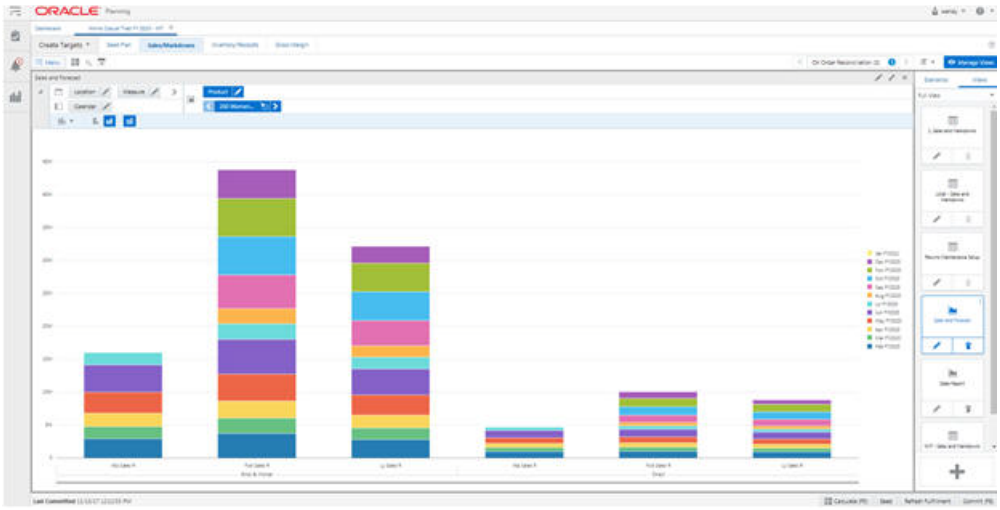


Figure 9–2 Chart in 2-Horizontal View Mode

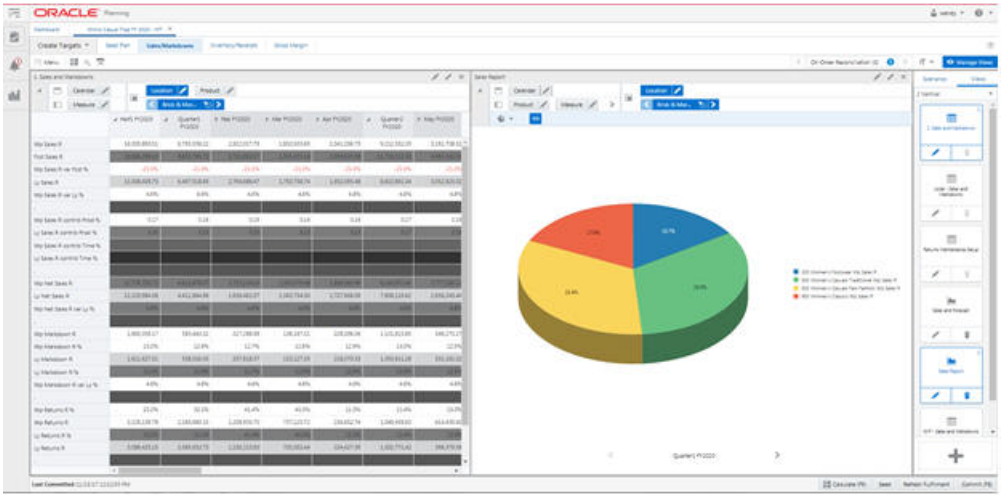


Figure 9–3 Chart in 2-Vertical View Mode

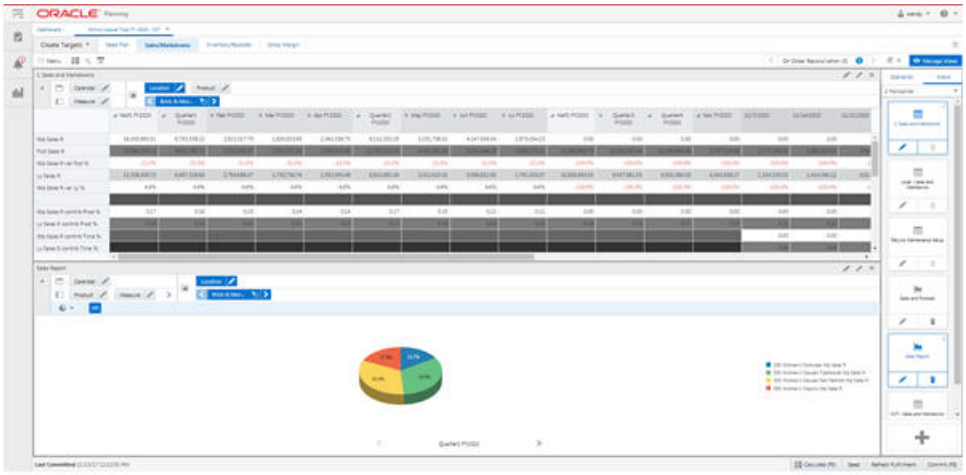
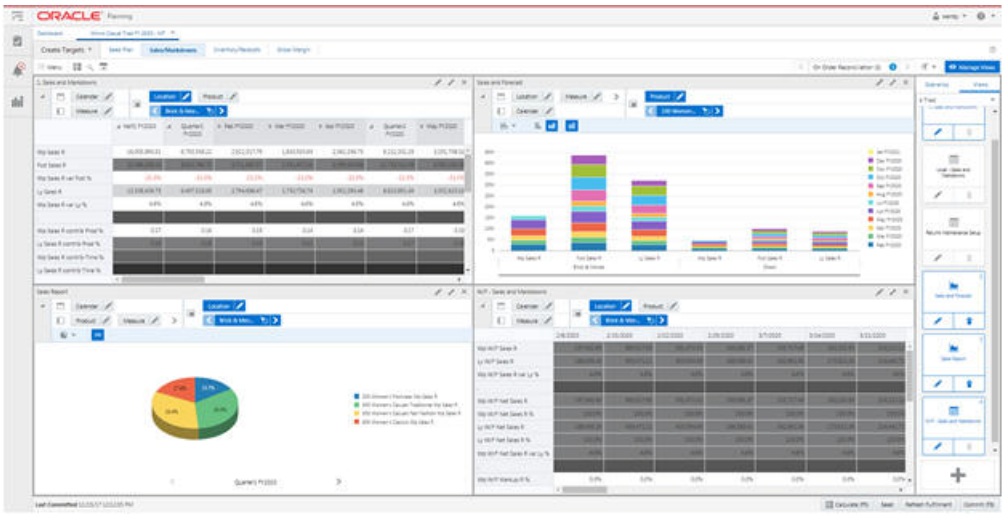


Figure 9–4 Chart in 4-Tiled View Mode

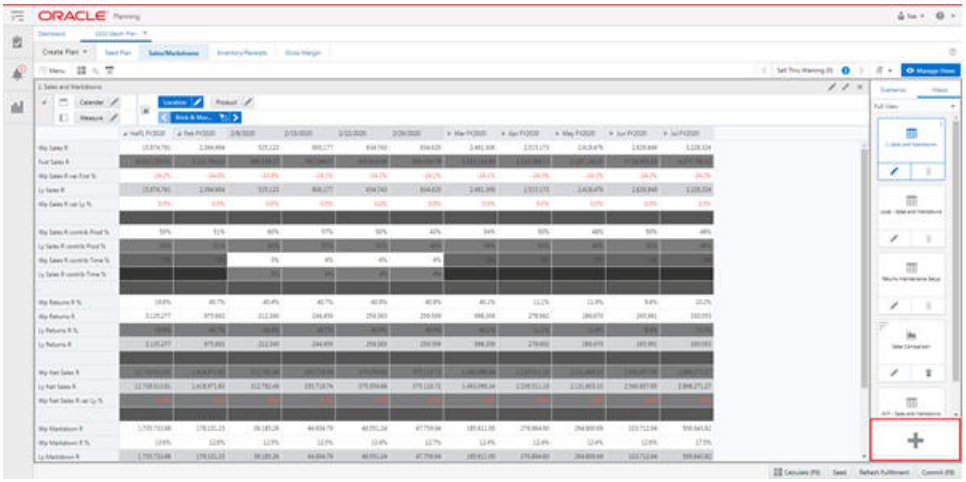


Creating a Chart

You can create a chart for any of the existing views containing the same or different data. It can be helpful to have a pivot table view and a chart view open at the same time to make changes to the pivot table values and see the results in the chart value.

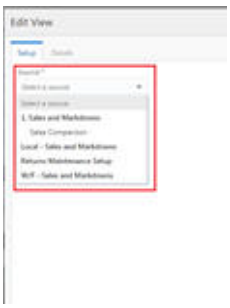
1. Click **Plus** in the View Management Drawer.

Figure 9–5 Creating a Chart



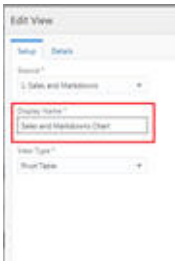
2. In Edit View, **Select a Source** and select from the existing views. This example uses Sales and Markdowns as the source. All data that exists in the Sales and Markdowns view is available in the new chart view being created.

Figure 9–6 Select a Source



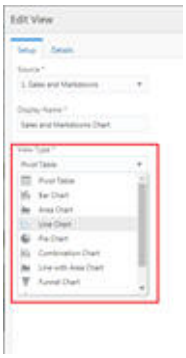
3. In the Edit View dialog box, enter a name for the new view. Here, it is a name similar to the source.

Figure 9–7 New View Name



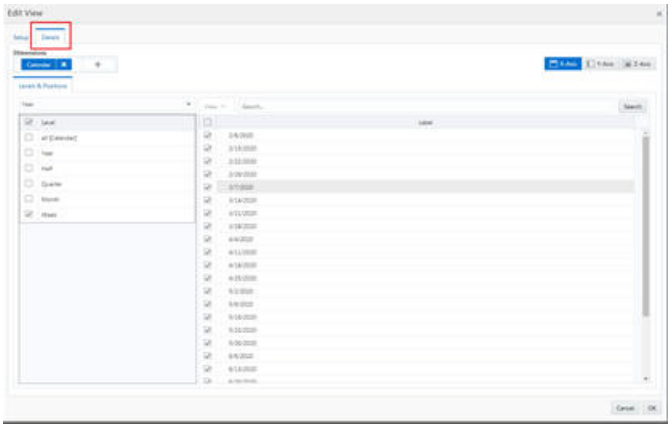
4. Select the type of chart from the drop-down list.

Figure 9–8 Chart Type



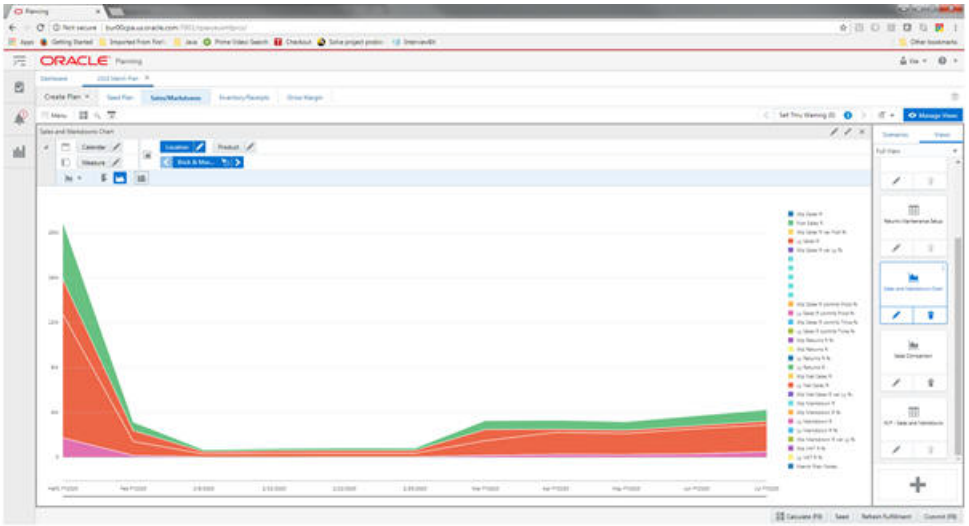
5. Click the **Details** tab to add, remove, or rearrange any levels or positions on the chart and click **OK**.

Figure 9–9 Chart Details



6. Drag the new Chart view tile into the content area to view the chart.

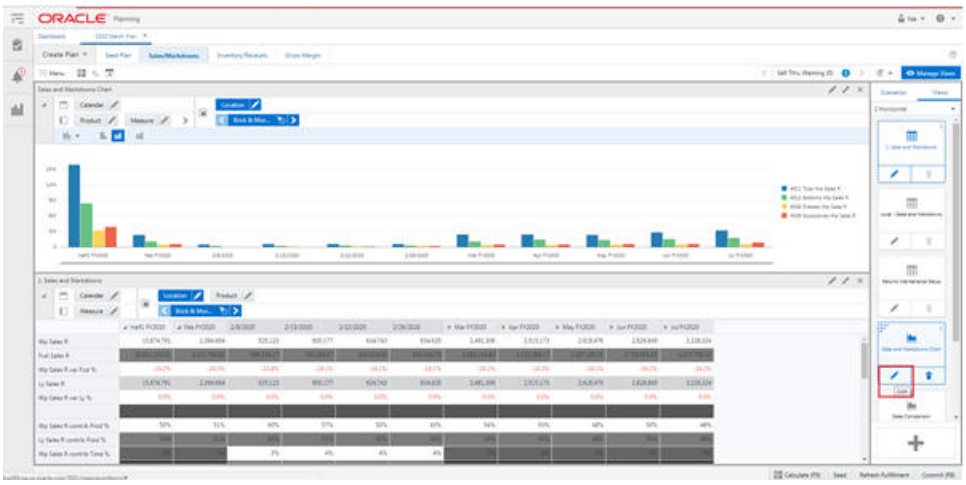
Figure 9–10 Chart View Tile



Customizing a Chart

You can customize a chart using Edit View, just like any other view. You can change the data representing dimension levels, change axes, measures, and so on. For more information, see Chapter 7, "Editing Views.".

Figure 9–11 Customize a Chart

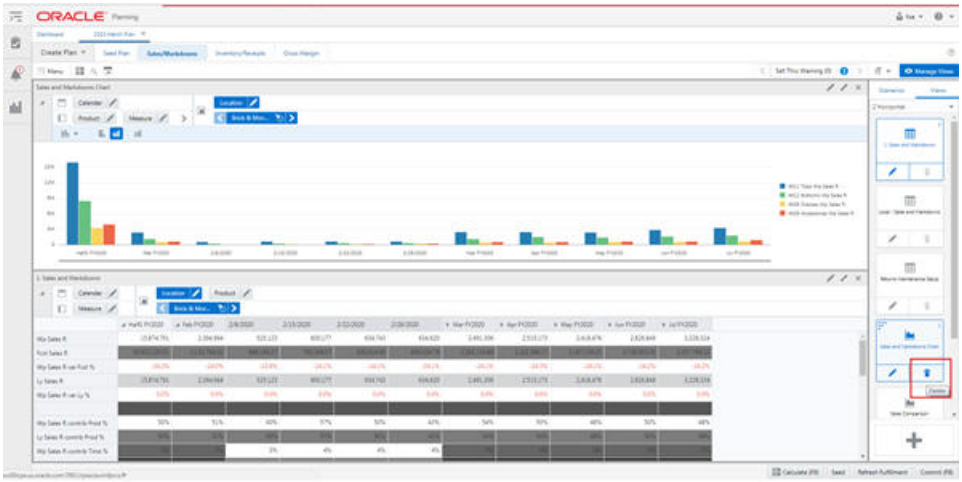


Deleting a Chart

To delete a chart, you delete the chart view from the View Management Drawer. Default views cannot be deleted.

Click **Delete** on the chart view in the View Management Drawer:

Figure 9–12 Deleting a Chart

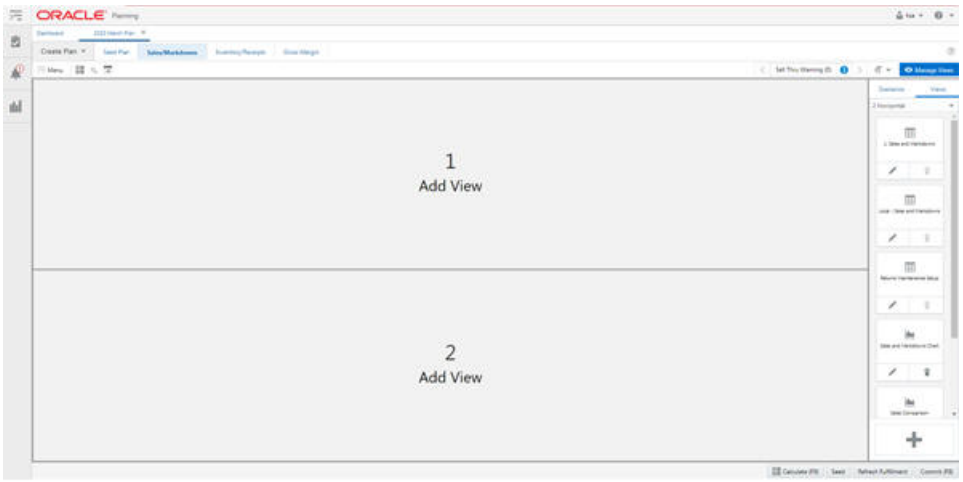


Synchronize Z Axis with Charts

It can be helpful to have a pivot table view and a chart view open at the same time to make changes to the pivot table values and see the results in the chart value. By enabling the Synchronize Z Axis button with both views displayed, you can scroll through positions on the Z axis, and both views will stay in synch.

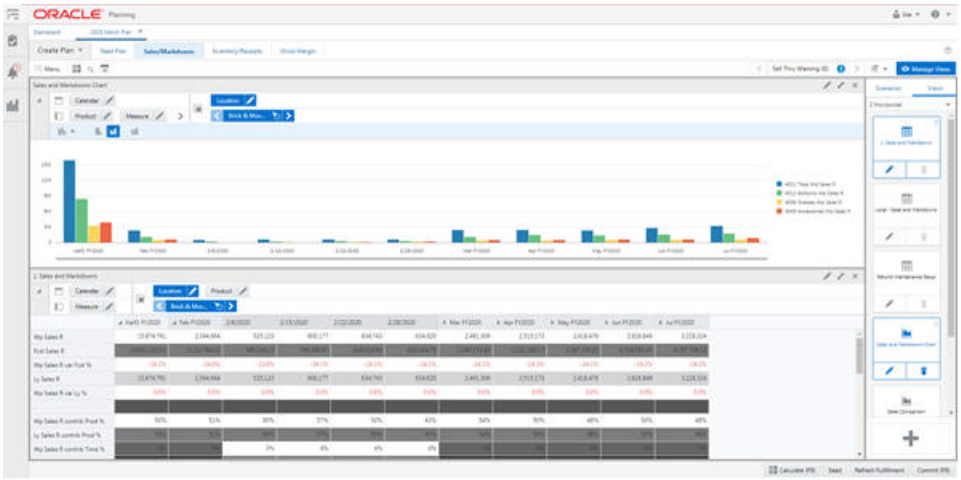
1. In the View Layout drop-down list, select any option except for Full View. In this example, 2 Horizontal has been selected.

Figure 9–13 View Layout



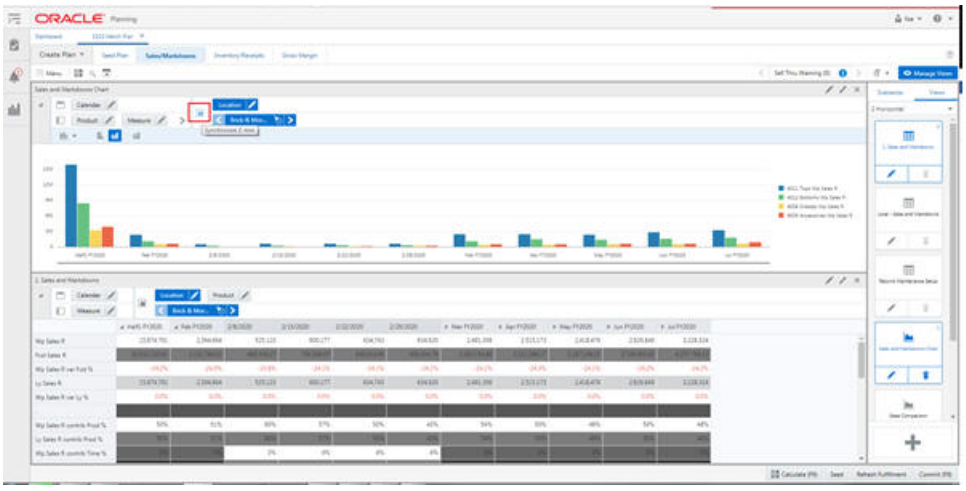
2. Add at least two views to a layout by dragging the View Tiles from the View Management Drawer. In this example, the Sales and Markdowns tile and the Sales and Markdowns Chart tile have been dragged into the layout.

Figure 9–14 View Tiles



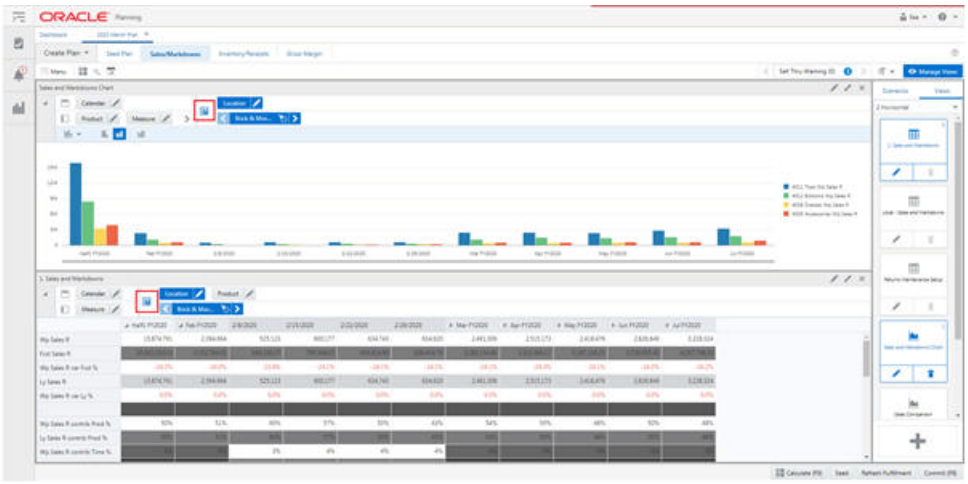
3. Click **Synchronize Z Axis** to activate it.

Figure 9–15 Activate Synchronize Z Axis



4. The activated Synchronize Z Axis button displays in blue on both tiles.

Figure 9–16 Activate Synchronize Z Axis Button



5. Click the right arrow on the Location position in one of the views, and note that both views have scrolled to the same next position. In this example, the position has changed from Brick & Mortar to Direct for both views.

Figure 9–17 Location Position

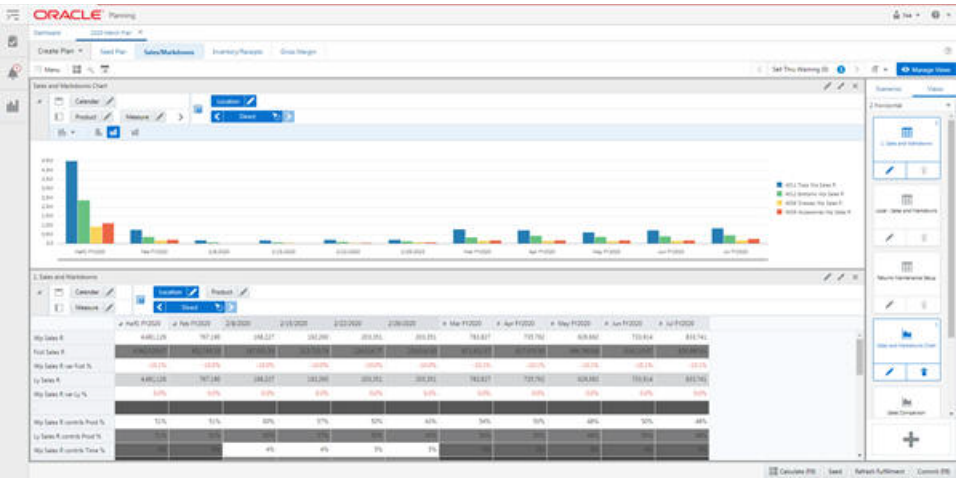


Chart Types

The following chart types are available:

Multi-Series

- Bar Chart
- Area Chart
- Line Chart
- Combination Chart
- Line with Area Chart
- Polar Chart

Single Series

- Pie Chart
- Funnel Chart
- Pyramid Chart

Multi-Series Charts

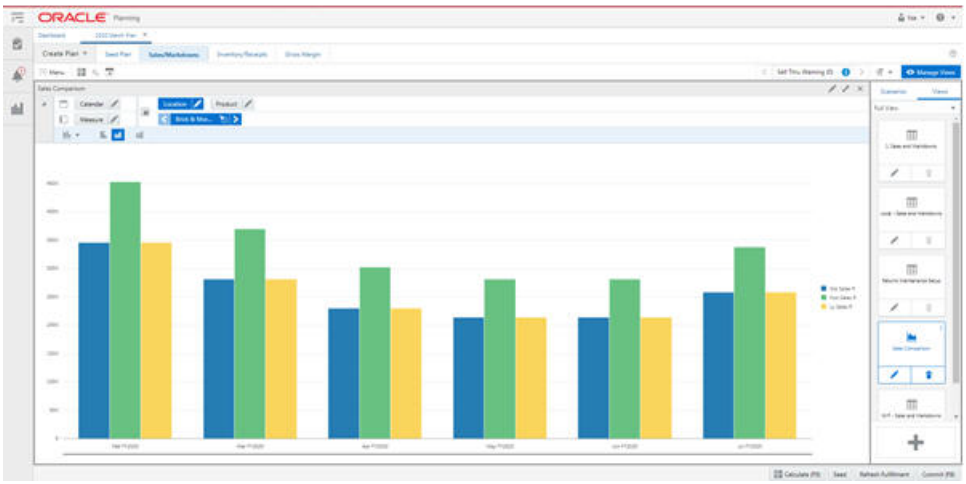
A multi-series chart shows multiple series of data. Here are two examples.

- Regular sales for ten different stores over time, where the multiple number of stores makes it a multi-series chart. A single series chart shows only one series of data.
- Regular sales for one store over time, where one store makes it a single-series chart.

Bar Chart

In a Bar Chart, the data is represented as a series of vertical or horizontal bars. It can be used to examine trends over time or compare items at the same time (for example, sales for different products in different quarters).

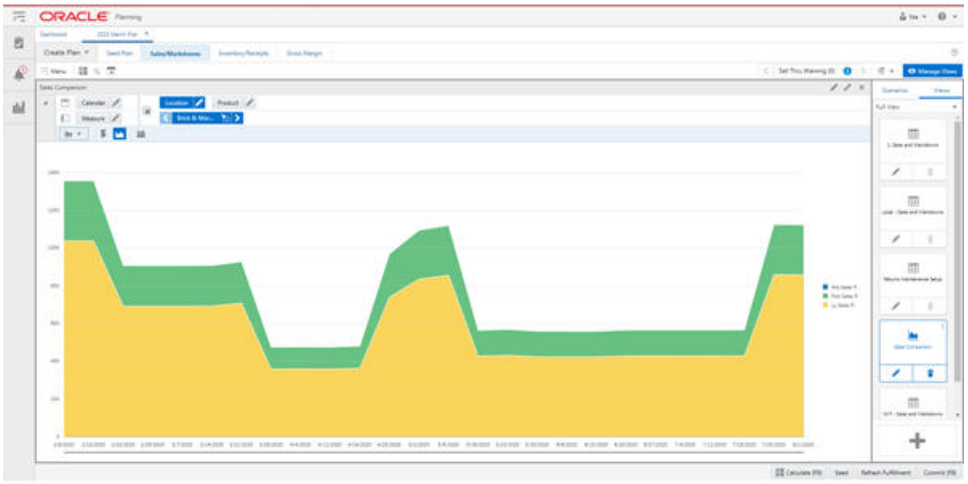
Figure 9–18 Bar Chart



Area Chart

In an Area chart, the data is represented as a filled-in area. An area chart 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.

Figure 9–19 Area Chart



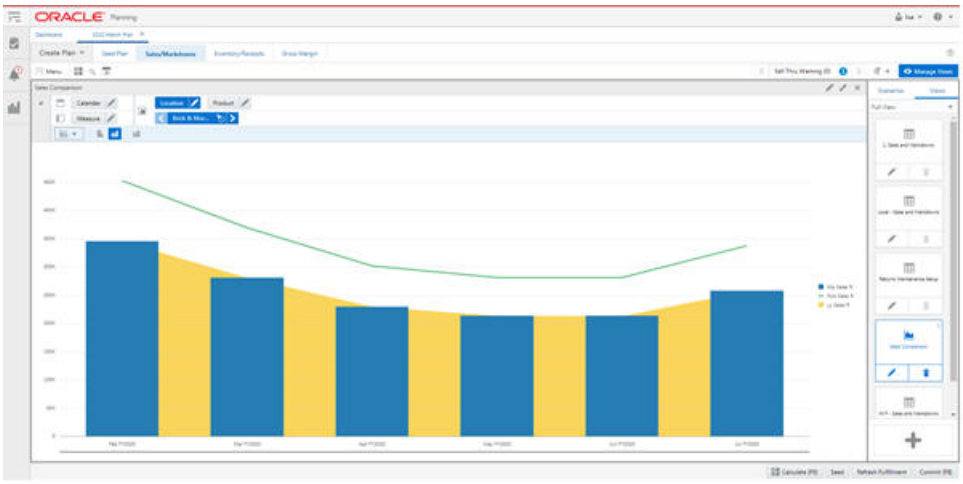
Line Chart

In a Line Chart, the data is represented as a line, a 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.

Combination Chart

The Combination Chart uses three different types of data markers to display different kinds of data items. The Combination Chart 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.

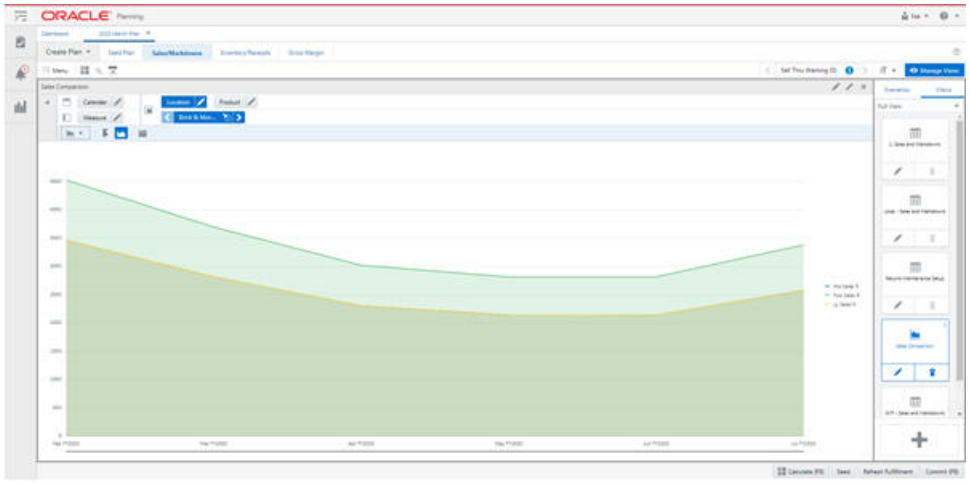
Figure 9–20 Combination Chart



Line with Area Chart

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

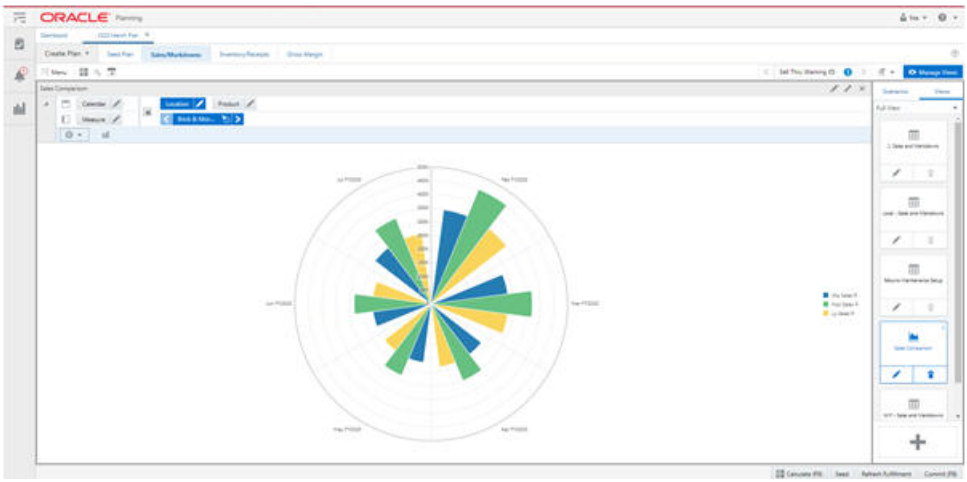
Figure 9–21 Line with Area Chart



Polar Chart

A Polar Chart is a diagram in which a point of origin is surrounded by a curve whose radius at any given point is proportional to the magnitude of some property measured in the direction of that point.

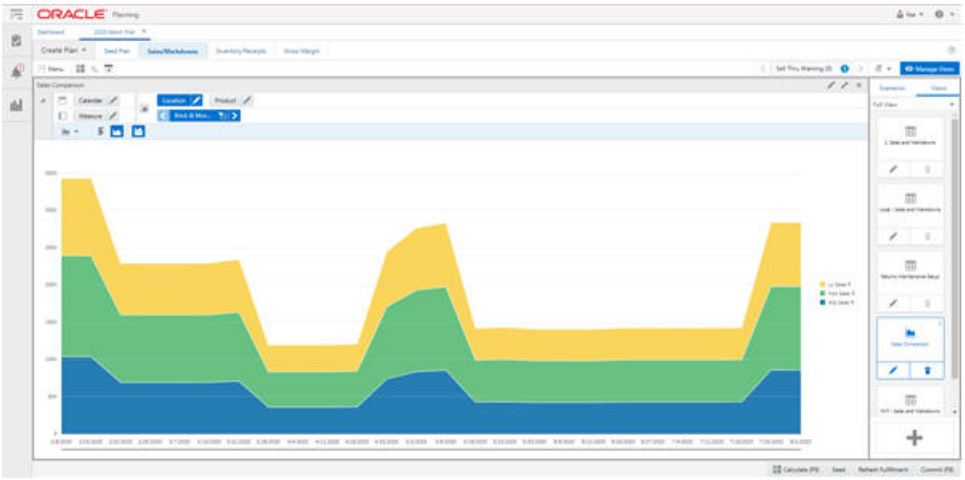
Figure 9–22 Polar Chart



Stacked Area Chart

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.

Figure 9–23 Stacked Area Chart



Single Series Charts

A single series chart shows only one series, or set, of data. Here are two examples.

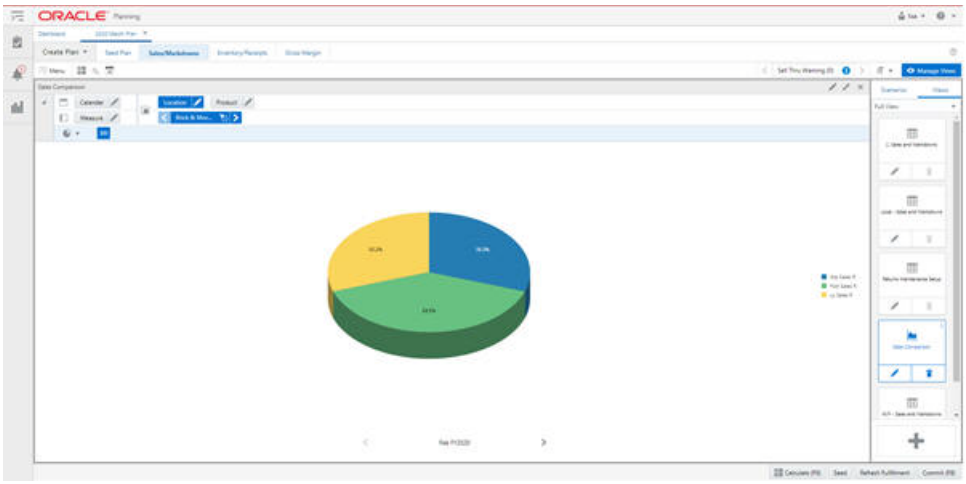
- Regular sales for one store over time. A multiple-series chart shows multiple series, or sets, of data.
- Regular sales for ten different stores over time.

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.

In Figure 9–24, because this is a single-series chart, only one quarter is shown at a time.

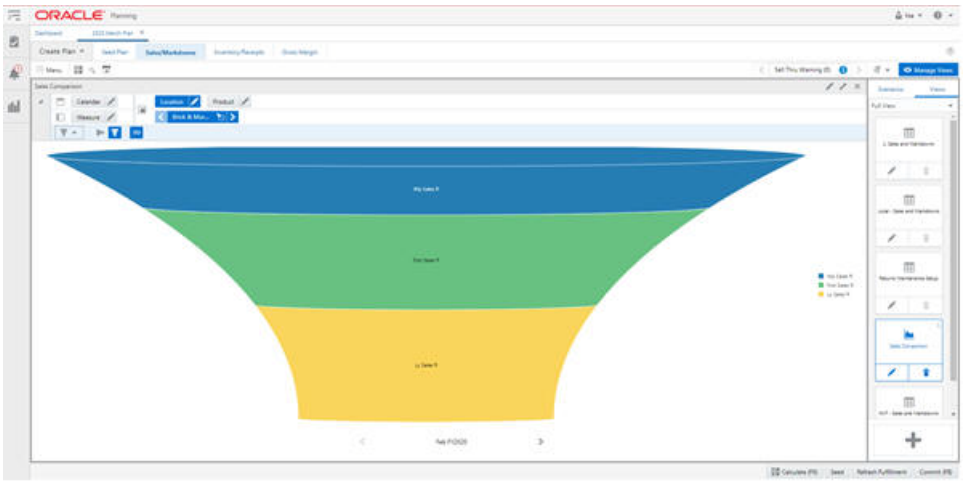
Figure 9–24 Pie Chart



Funnel Chart

Funnel charts are useful for viewing data for stages of a process, such as the stages of a sales process. The area of a funnel slice is proportional to its value for the corresponding stage.

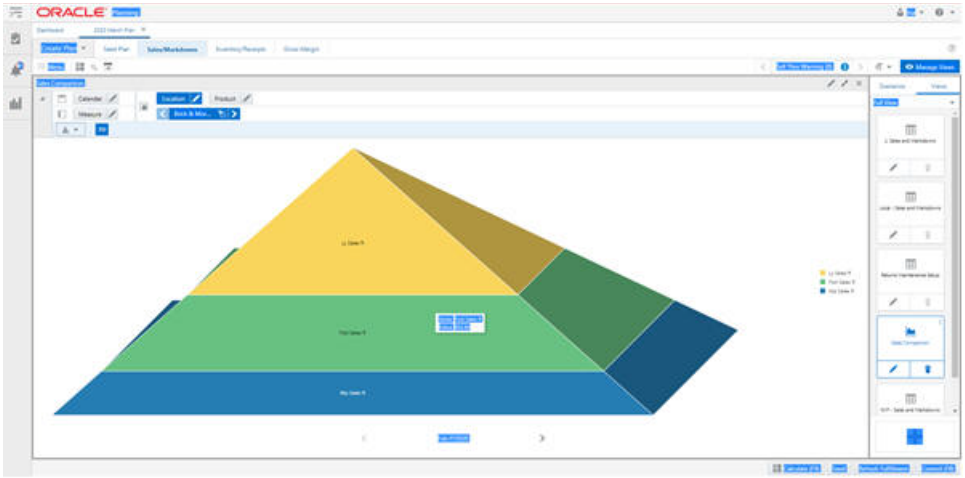
Figure 9–25 Funnel Chart



Pyramid Chart

A pyramid chart has the form of a triangle with lines dividing it into sections. Each section contains a related topic or idea. Because of the triangular shape, each section is a different width from the others; this width indicates a level of hierarchy among the topics. For example, the widest section may contain a general topic and the narrowest section may contain a much more specific topic from within that general topic. However, the width is not visually representative of the quantity beyond larger or smaller.

Figure 9–26 Pyramid Chart

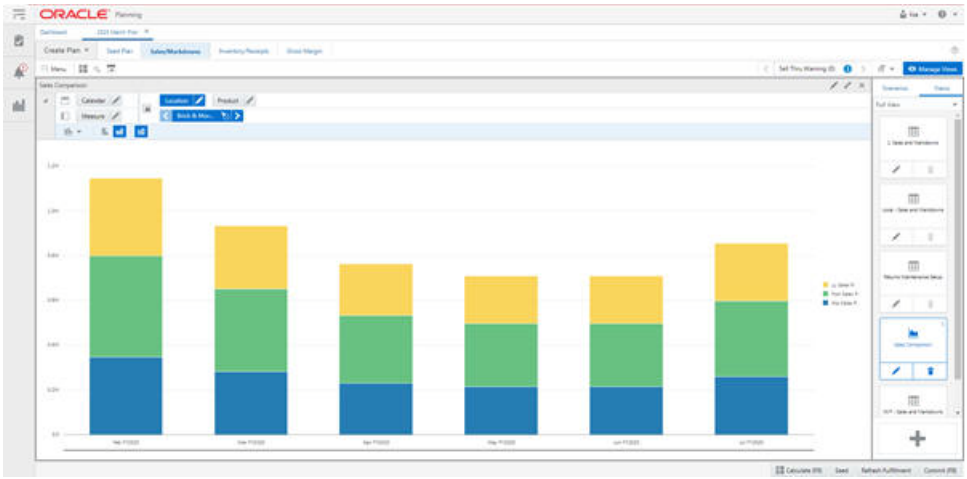


Formatting Charts

Each of the chart types has different types of formatting options. To change the chart format, click one of the buttons below the Dimension Tiles area. Note that not all formatting options work with all chart types:

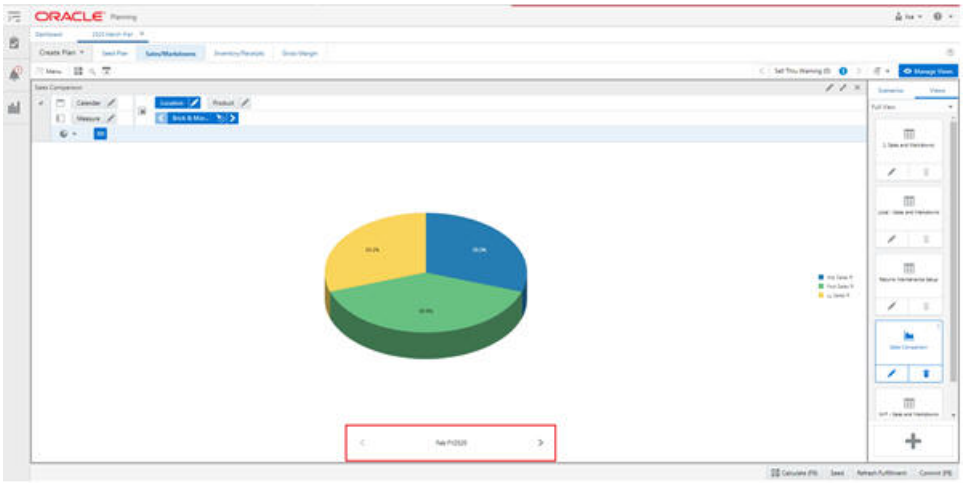
- Stacked charts help in displaying the cumulative magnitude of two or more data series. They are useful in representing a data value as a sum of two or more values. Each data series can be distinguished by the color of its section in the stack.

Figure 9–27 Stacked Chart



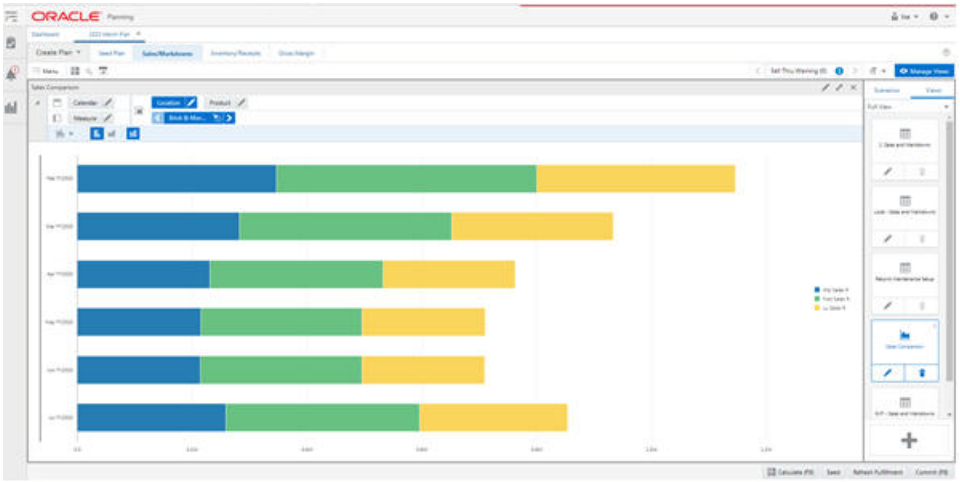
- 3-D charts rotate the chart into a 3-D display.

Figure 9–28 3-D Chart



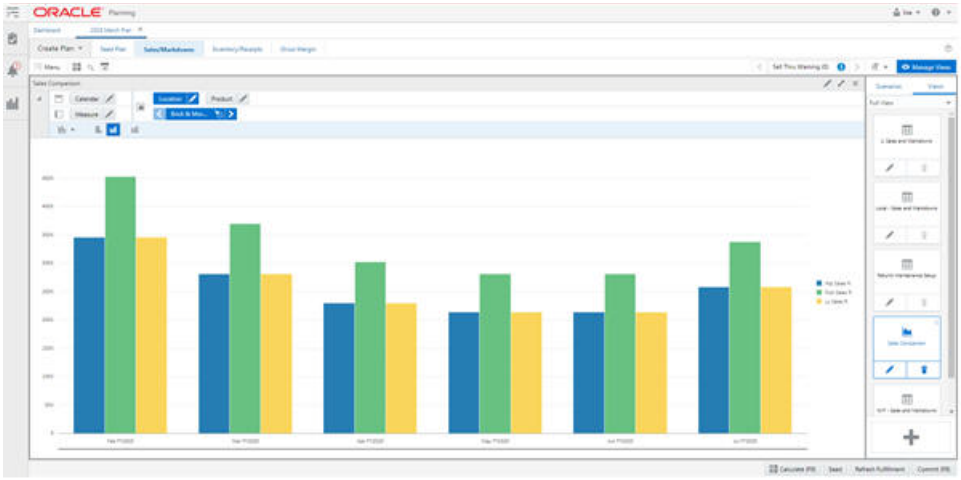
- The horizontal button rotates the chart from vertical to horizontal.

Figure 9–29 Horizontal Chart



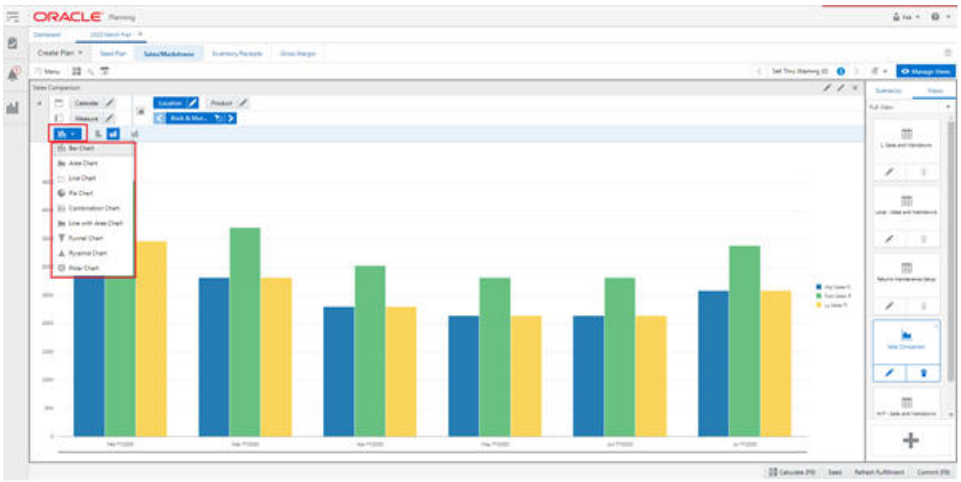
- The vertical button rotates the chart from vertical to horizontal.

Figure 9–30 Vertical Chart



- The Change Chart Type button allows you to quickly change the chart type to any of the other types not currently displayed.

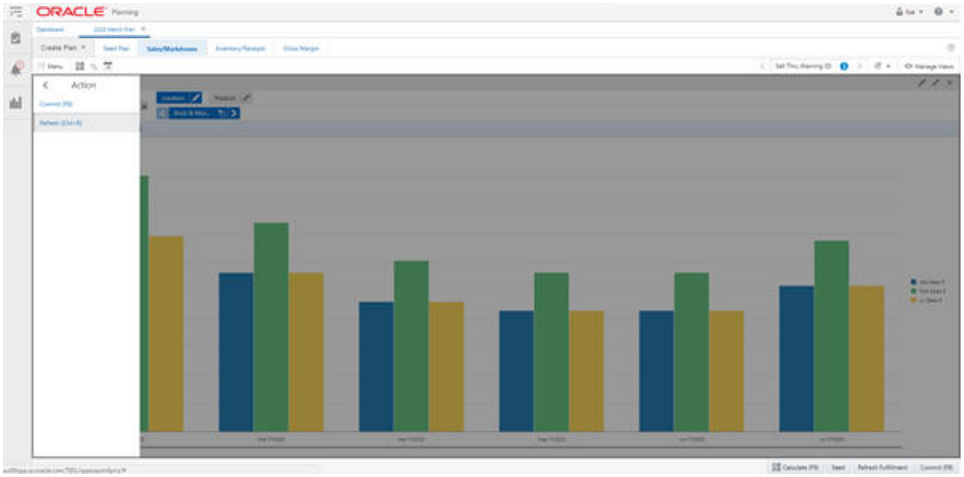
Figure 9–31 Change Chart Type



Refreshing the Chart

To update the chart with the latest data from the database, click Menu->Action ->Refresh (Ctrl + R). This refreshes the charts and pivot tables.

Figure 9–32 Refresh Chart



10

Formatting

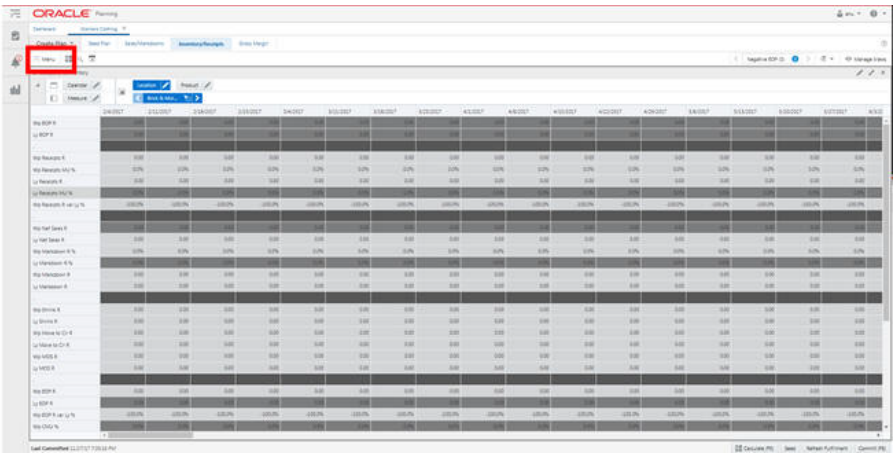
Using the Format functionality, you can set and clear formats that apply to measures, dimensions, and exceptions. You can make changes to single or multiple measures, dimensions, and exceptions and apply these changes across one, many, or all views in the workspace.

Using the Filter in the Format Dialog Box

To find measures using the filter, complete the following steps:

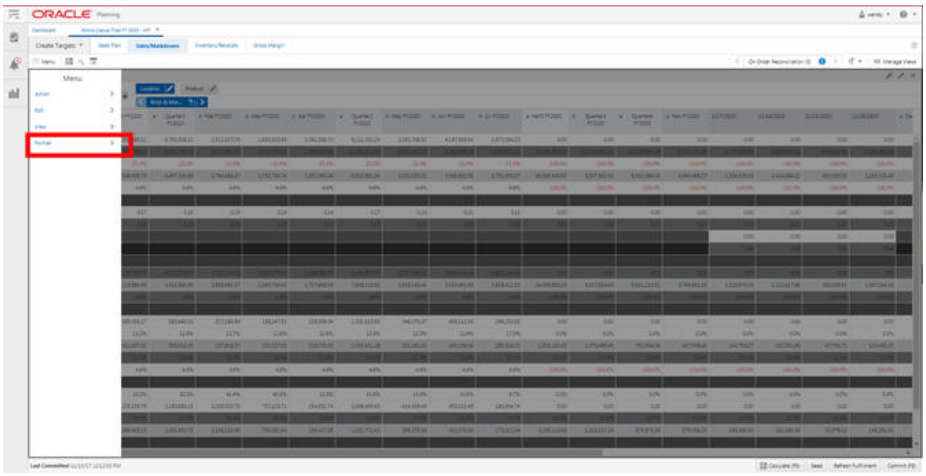
1. Click **Menu** on the Quick Access Toolbar.

Figure 10–1 Quick Access Toolbar Menu



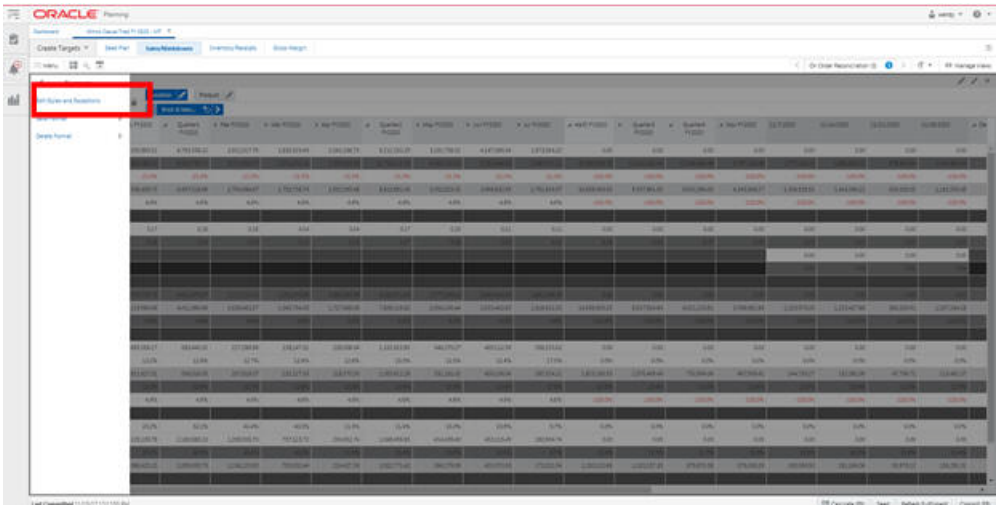
2. Click **Format** to open the Format menu.

Figure 10–2 Open the Format Menu



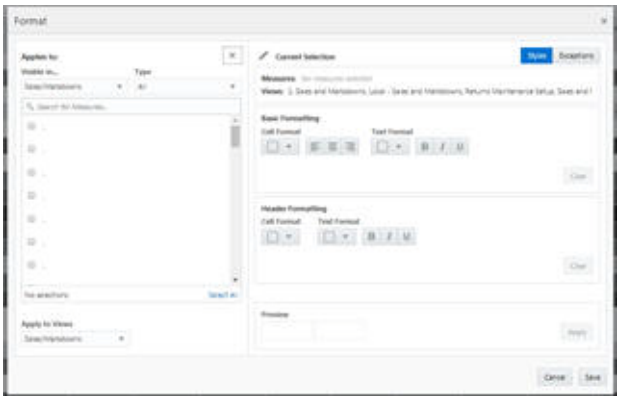
3. Click **Edit Styles and Exceptions** to open the Format dialog box.

Figure 10–3 Edit Styles and Exceptions



4. You can use the filter to find measures that share a common name, type, or location.

Figure 10–4 Filter Measures



Enter data in at least one of the following fields in the Styles tab or the Exception tab as needed. The Styles tab is used for measure formats, and Exceptions tab is used for Alert condition formats.

- **Search for Measures:** Enter the word or phrase you want to find. The search for the word or phrase is conducted throughout the entire label string, including any displayed attributes. This field is not case sensitive.
- **Type:** Select the type of measure you are searching for. The 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.
- **Applies To:** Selects the view you want to change the styles in.

Modifying Measure Styles

From the 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 or the cells.

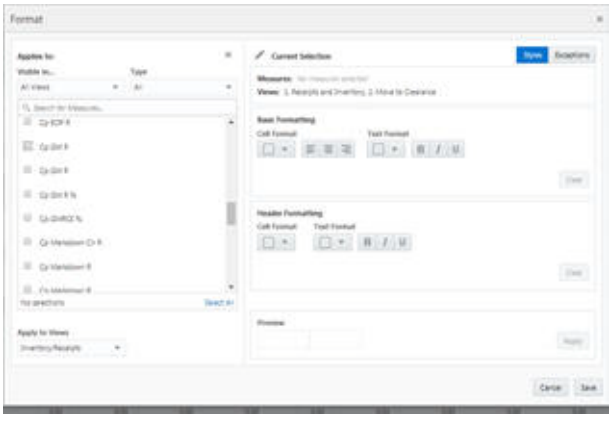
When the filter feature is not in use, the measures that appear in the Measure field within the Apply measure format section show the measures that are contained in the current view.

After you have found the measures you want to change, you can edit or clear the existing formats for those measures and add new ones.

To alter the measure format, complete the following steps:

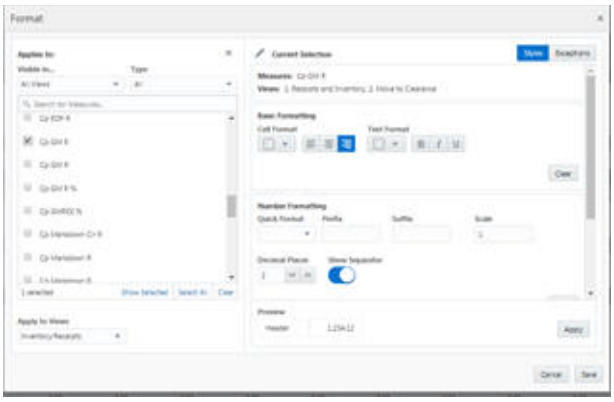
1. In the Format dialog box, select the Styles tab. Select the views that contain the measures in the **Visible in** field and **Type** of the measures that you want to change. See "Using the Filter in the Format Dialog Box" for more details.

Figure 10–5 Styles Tab



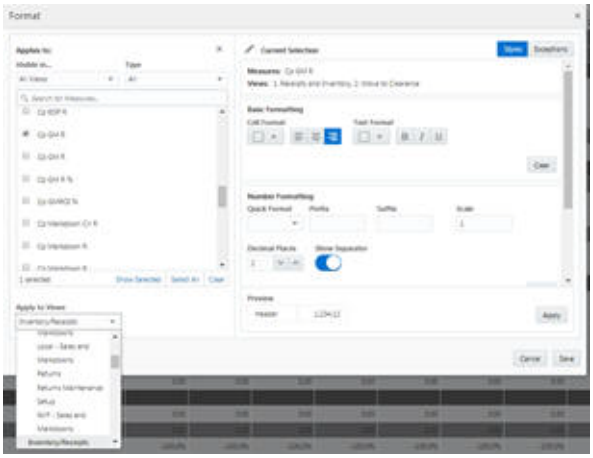
2. Use the filter to find the measures you want to alter. You can enter search text in the Search for measures field or select the measures in the display area by scrolling. You can select one, several, or all. To view only the selected measure, click **Show Selected.** To select all measures, click **Select All**. To clear the selection, click **Clear**.

Figure 10–6 Alter Measure



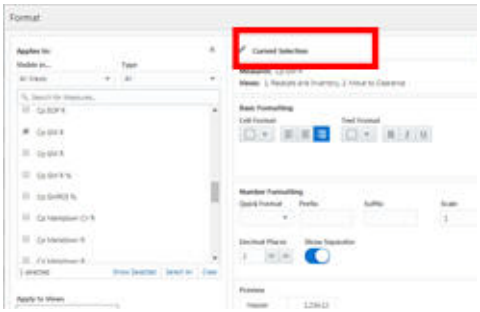
3. In the Applies to field, select the views that you want to apply the formats to.

Figure 10–7 Applies To Field



4. Click the current selection to hide the selection panel.

Figure 10–8 Hide Selection Panel



5. You can see the summary of your selection under Measures and Views, as shown in Figure 10–9. Click **Show More** or **Show Less** to see the selection criteria, as shown in Figure 10–10.

Figure 10–9 Selection Measure

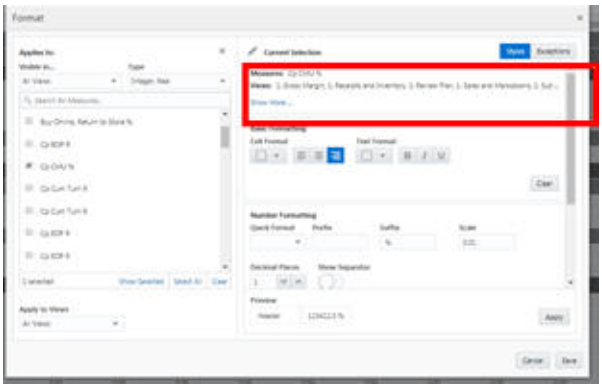
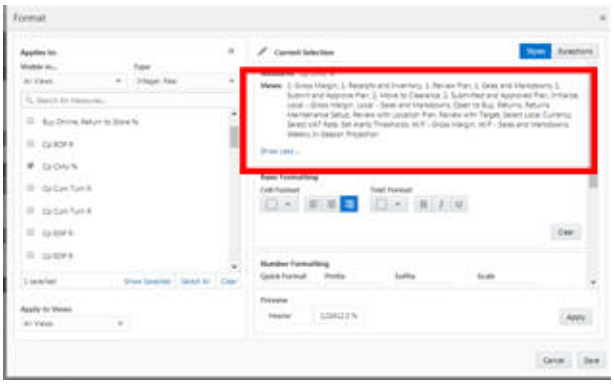
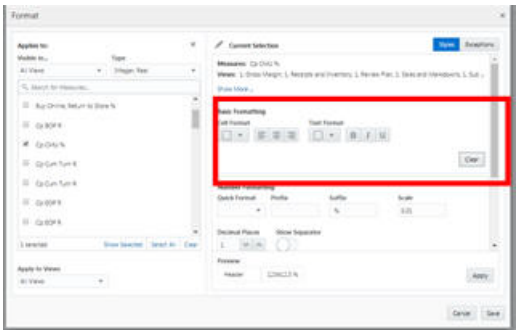


Figure 10–10 Selection Views



6. The Basic Formatting section includes the following options:
   - Cell Format
   - Text alignment
   - Text Format
   - Bold
   - Italics
   - Underline

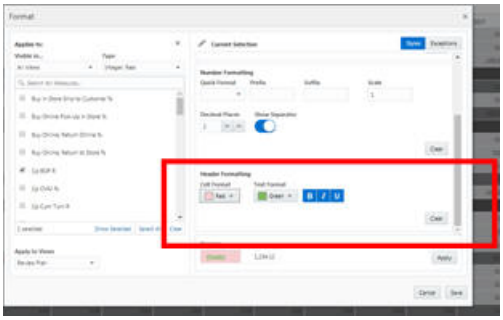
Figure 10–11 Basic Formatting



7. You can modify the basic formats as needed. To clear all styles, click **Clear**.

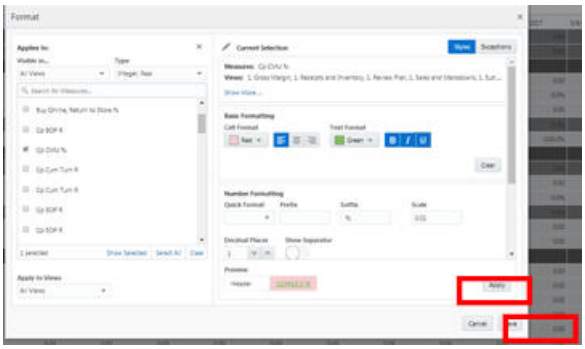
8. The Header Formatting section includes the following options:
   - Cell Format
   - Text Format
   - Bold
   - Italics
   - Underline

Figure 10–12 Header Formatting



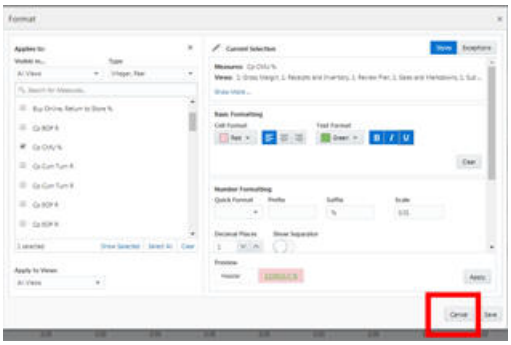
9. You can modify the header formats as needed. To revert all the changes you make at once, click **Clear**.
10. Click **Apply** or **Save** to apply the modified basic formats. Apply applies the formatting, but it does not close the Format dialog box. Save applies the formatting and closes the Format dialog box.

Figure 10–13 Apply or Save in Format Dialog Box



11. To close the dialog box without applying your changes, click **Cancel**.

Figure 10–14 Close the Format Dialog Box



Number Formatting

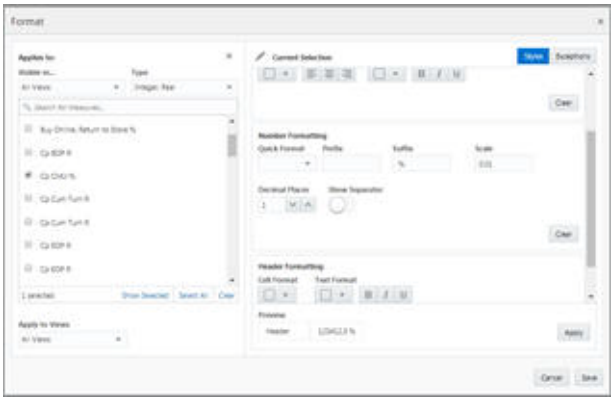
When you select integer or real type measures using the filter feature, you can modify the number formatting for those measures. When you are not using the filter feature, the measures that appear in the Measure field within the Apply measure format section shows the measures that are contained in the current view.

After you have found the measures you want to change, you can edit or clear the existing number formats for those measures and add new ones.

To alter the number format, complete the following steps:

1. Select the measures that include number formatting. See "Using the Filter in the Format Dialog Box" for more details.

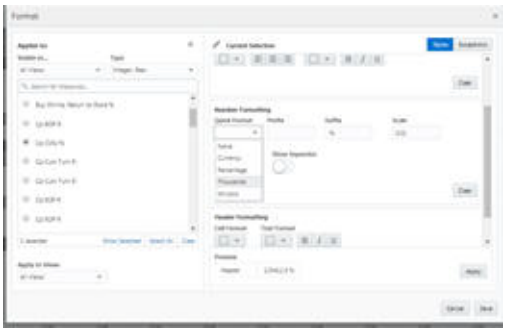
Figure 10–15 Number Formatting



2. The Quick Format field contains four pre-configured number formats: currency, percentage, thousands, and millions. If one of these formats suits your needs, select it. If none of the formats is appropriate, select **None**.

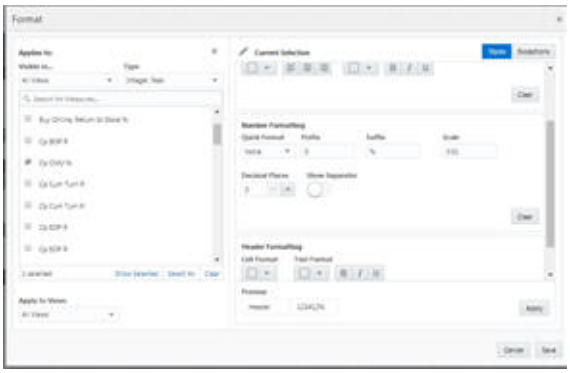
   - **Currency:** The currency format has a scale factor of 1 and a prefix of $. It has a precision of 2. For example, $1223.45.
   - **Percentage:** The percentage format has a scale factor of 0.01 and a suffix of %. It has a precision of 0. For example, 16%.
   - **Thousands:** The thousands format has 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.

Figure 10–16 Quick Format



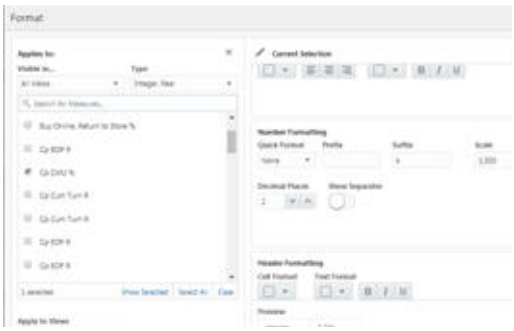
3. The values in the Prefix, Suffix, and Scale fields are adjusted accordingly. If the quick formats are not appropriate, continue to the next steps to adjust the remaining fields.
   - In the Prefix field, enter a string of up to seven characters that you want to appear before the number. Prefixes are often used for a currency symbol.
   - In the Suffix field, enter a string of up to seven characters that you want to appear after the number. Suffixes are often used to denote scaling factors (k, m) or percentages (%).
   - In the Scale field, enter the factor to be applied to the displayed values to produce an internal value. For example, you can use this to display a fractional value as a percentage with a scale factor of 0.01.

Figure 10–17 Prefix, Suffix, and Scale Fields



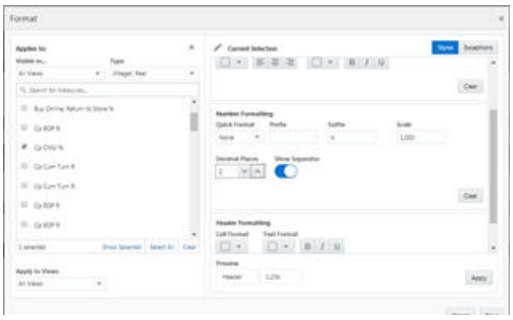
4. In the Decimal Places field, enter the number of places to the right of the decimal to be displayed. The precision value for integers is 0. Once you have entered the value in the Decimal Places, you see how the formatted number appears.

Figure 10–18 Decimal Places



5. Select **Show Separator** to use the thousands separator in the view. The thousands separator used is dependent upon the regional setting.

Figure 10–19 Show Separator



Modifying Date and Time Formats

When you select date measures with the filter feature, you can modify the date and time formatting for those measures. When you are not using the filter feature, the measures that appear in the Measure field within the Apply Date/Time format section show only date measures that are visible in the current view. See "Using the Filter in the Format Dialog Box" for more details.

To alter the Date/Time format, use the Time field to configure how the time is displayed.

- Select **No Time** if you do not want the time data to be displayed with the date.
- Select **12 Hour Format** to display the time in 12-hour format. Example: 10:58PM.
- Select **24 Hour Format** to display the time in 24-hour format. Example: 22:58PM.

Once you have made your selection, an example of the time format you select appears below the time field.

Figure 10–20 Time Field

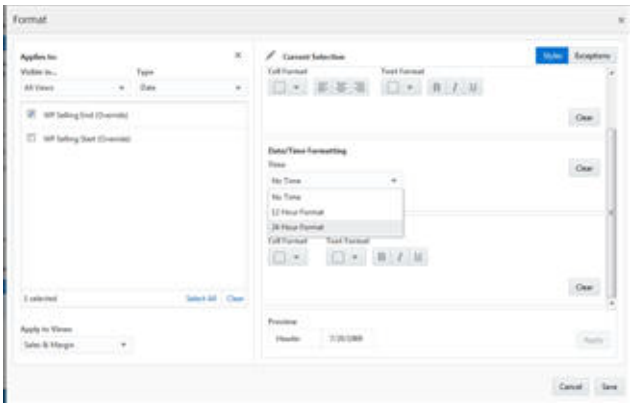
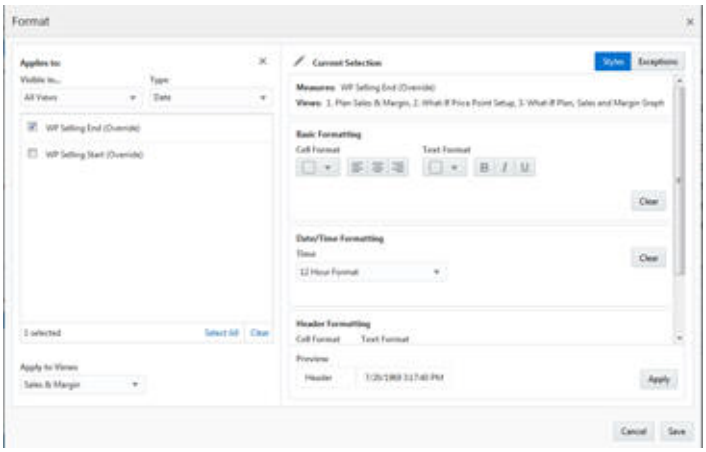


Figure 10–21 Time Field



Modifying Exceptions

Exception formatting is used to set up conditions to alter certain measure styles when the specified condition is met. This helps you to quickly notice a cell that meets these conditions. 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.

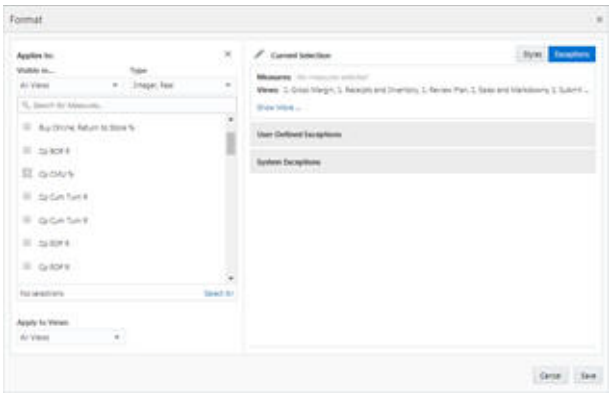
From the Exceptions tab of the Format dialog box, you can use the filter feature to locate measure and then modify the exception formatting for those measures. When you are not using the filter feature, the measures that appear in the Measure field within the Apply measure format section show the numeric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

Numeric Exception Formatting

To apply exception formatting, click the **Exceptions** tab of the Format dialog box and complete the following steps:

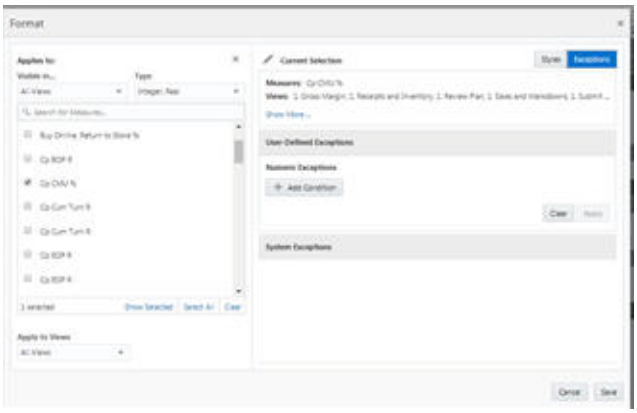
1. In the Format dialog box, select the **Exceptions** tab. Select the views that contain the measures in the **Visible in** field and **Type** of the measures that you want to change. See "Using the Filter in the Format Dialog Box" for more details.

Figure 10–22 Exception Tab



2. Use the filter to find the measures you want to alter. You can enter search text in the Search for measures field or select the measures in the display area by scrolling. You can select one, several, or all. o view only the selected measure, click **Show Selected.** To select all measures, click **Select All**. To clear the selection, click **Clear**.

Figure 10–23 Measure to Alter



3. In the Applies to field, select the views to apply the formats to.
4. Click the current selection to hide the selection panel.
5. You can see the summary of your selection under Measures and Views. Click **Show More** or **Show Less** to see the selection criteria.
6. Under the User-Defined Exceptions, depending upon the type of measure selection, you can add either Numeric Exceptions or Boolean Exception.
7. For the Numeric Exceptions, click **Add Condition**, Use the **Condition and Value** fields to set the parameters for the exception. You can add a maximum of two user-defined exceptions, one for Greater Than or Equal and the other for Less Than or Equal.

   In the Condition field, select one these options:

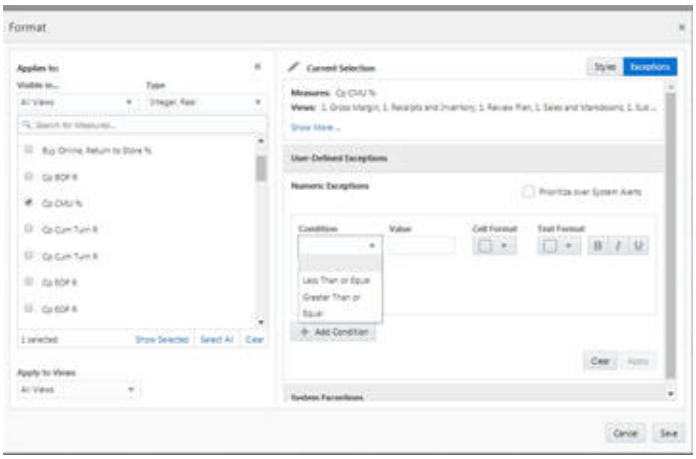
   - **Less Than or Equal:** Use this to select values that are less than or equal to a value specified by the user.
   - **Greater Than or Equal:** Use this to select values that are greater than or equal to a value specified by the user.

- **Equal:**

Note: If you are entering a value that has a scale factor, such as a percentage, enter the raw value. For example, if you want to enter 10%, you should enter .1.

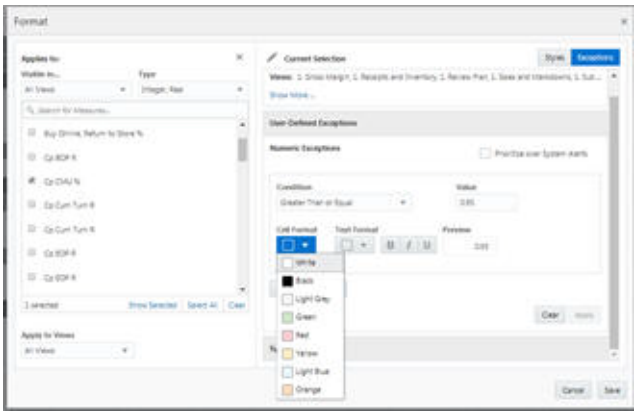
Exceptions applied to integer measures must have integer values.

Figure 10–24 Condition Value



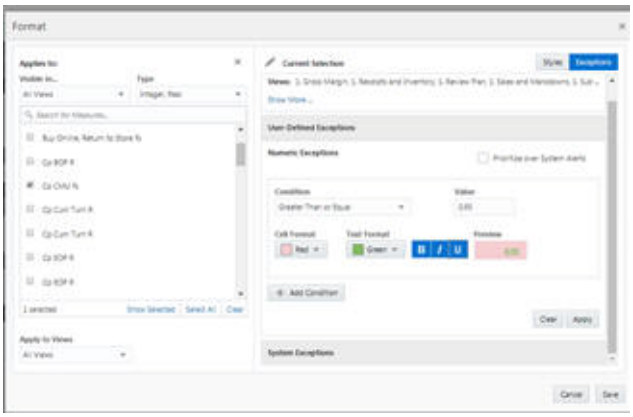
8. Under Cell Format, choose the settings you want to apply.

Figure 10–25 Cell Format



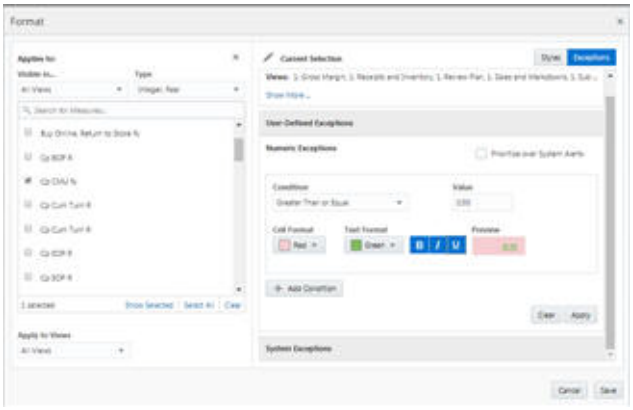
9. In the Text Format fields, choose the settings you want to apply, Bold, Italics, and Underline.

Figure 10–26 Text Format



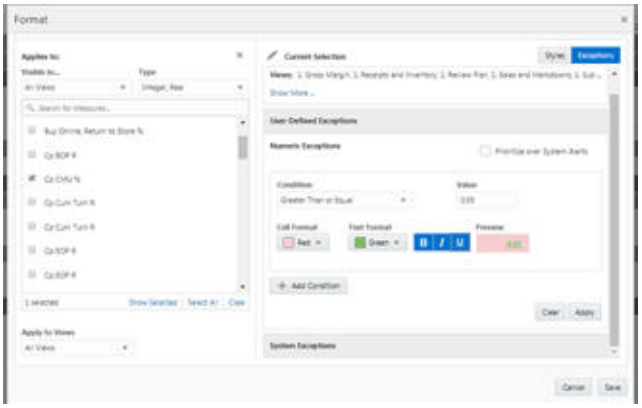
10. Preview displays how the format change appear. Click **Apply** to add the condition with format. To prioritize the alert you created over System alert, click the check box for Prioritize over system alert.

Figure 10–27 Apply Exception



11. Click **Apply** or **Save** to apply the formats. Apply applies the formatting, but it does not close the Format dialog box. Save applies the formatting and closes the Format dialog box.

Figure 10–28 Apply

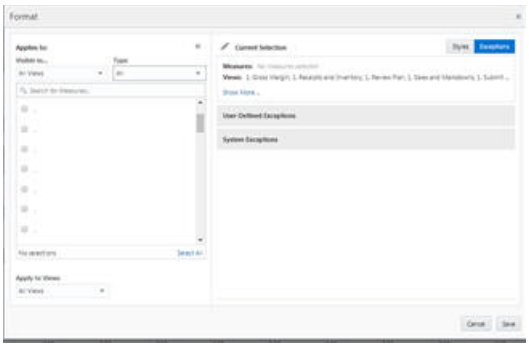


Boolean Exception Formatting

To apply exception formatting, click the **Exceptions** tab in the Format dialog box and complete the following steps:

1. In the Format dialog box, select the **Exceptions** tab. Select the views that contain the measures in the **Visible in** field and **Type** of the measures that you want to change. See "Using the Filter in the Format Dialog Box" for more details.

Figure 10–29 Exception Tab



2. Use the filter to find the measures you want to add the Exception. You can enter search text in the Search for measures field or select the measures in the display area by scrolling. You can select one, several, or all. o view only the selected measure, click **Show Selected.** To select all measures, click **Select All**. To clear the selection, click **Clear**.

Figure 10–30 Alert Measure

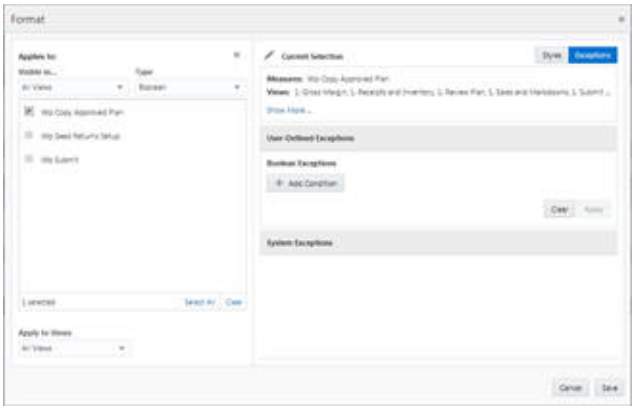
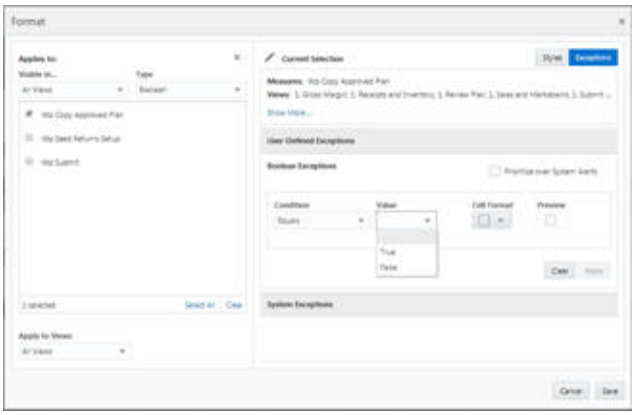
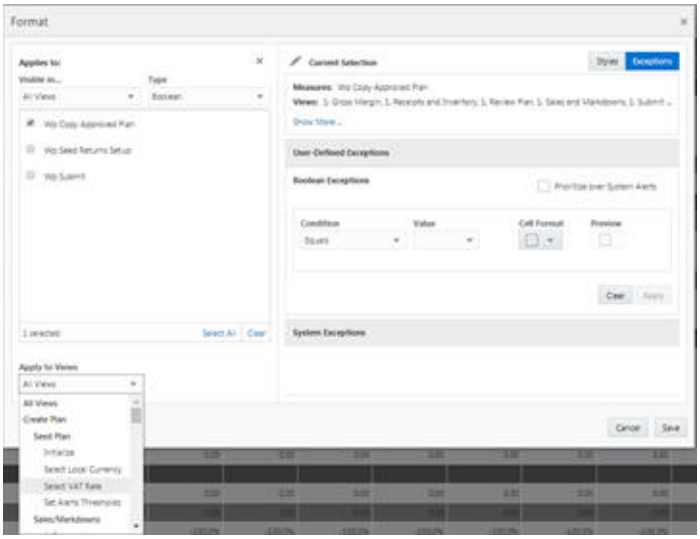


Figure 10–31 Add User-Defined Boolean Exception



3. In the Applies to field, select the views to apply the Exception to.

Figure 10–32 Applies To Field

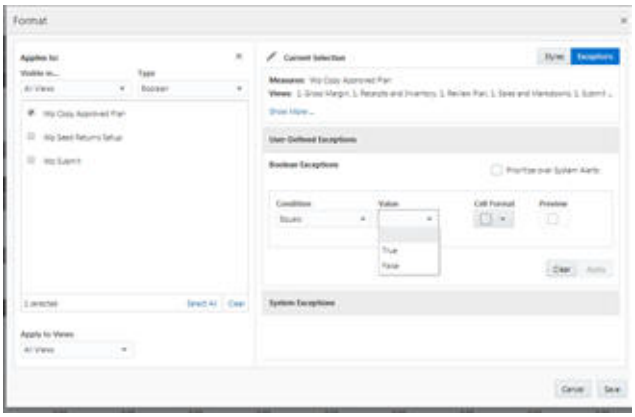


4. Click the current selection to hide the selection panel.
5. You can see the summary of your selection under Measures and Views. Click **Show More** or **Show Less** to see the selection criteria.
6. You can select the Boolean measure and under the User-Defined Exceptions, you see the Boolean Exception.
7. For the Boolean Exceptions, click **Add Condition** and use the Condition and Value fields to set the parameters of the exception. You can add the condition Equals and select the value as either True or False.

   In the Condition field, select one of two options:

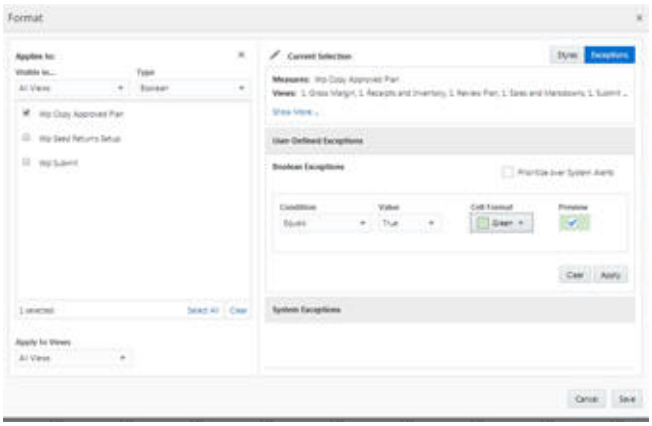
   - **True:** Use this to select values that have the Boolean flag as True.
   - **False:** Use this to select values that have the Boolean flag as False.

Figure 10–33 Condition Value



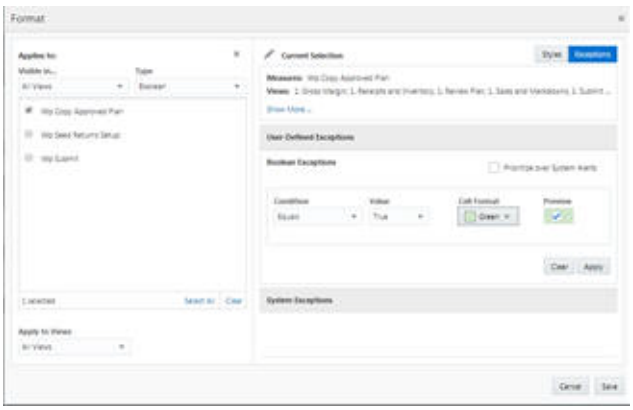
8. In the Cell Format, select the settings to apply.

Figure 10–34 Cell Format



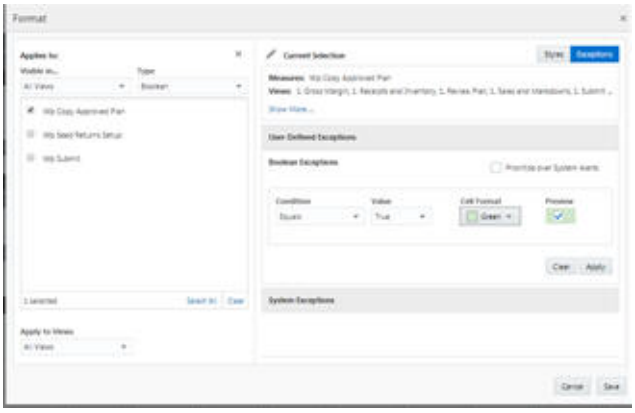
9. Preview displays how the format change appear. Click **Apply** to add the condition with format. To prioritize the alert you created over System alert, click the check box for Prioritize over system alert.

Figure 10–35 Apply Exception



10. Click **Apply** or **Save** to apply the formats. Apply applies the formatting, but it does not close the Format dialog box. Save applies the formatting and closes the Format dialog box.

Figure 10–36 Apply



Saving Formats

When you make changes in Format or Edit View and click **Apply** or **OK**, the format changes are saved for the current workspace only. All other changes to the workspace, including view changes or additions, view layout changes, changes to dimension tile layouts on the axes, changes to visible and hidden measures, aggregation rollups, and so on, are saved for the current workspace automatically. The next time this current workspace is opened, it will retain all the changes listed here.

To apply all the listed changes to all future workspaces created for this task, use the **Save Format** functionality. The Save Format options are:

- **Only for Me:** Applies the formatting to all future workspaces created for this task for the original the user only.
- **For My Group:** Administrators - applies formatting to all future workspaces created for this task for all users in the same group as the original user. The last user to save using this option will overwrite any previous user's saves for the group.

When a workspace is being created, formats are applied in the following order:

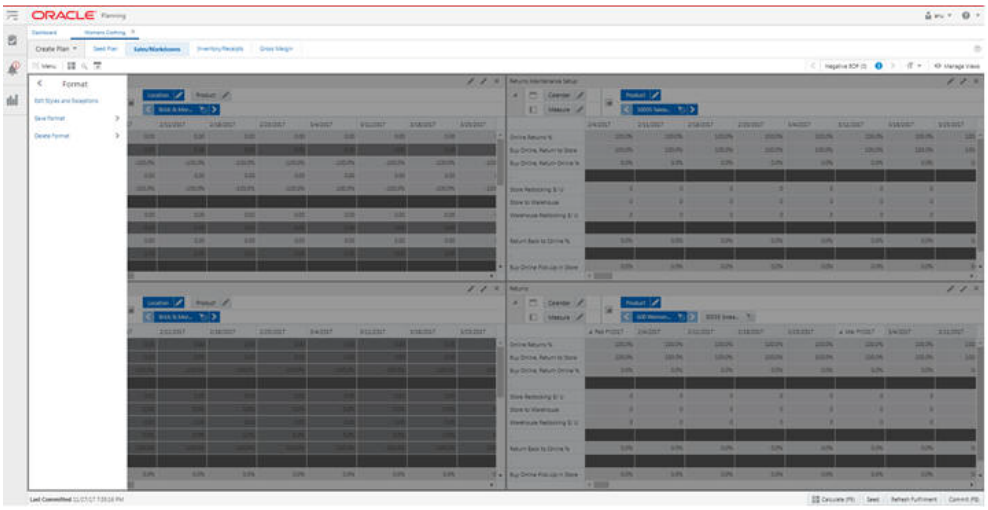
1. If Save Formats/Only For Me exists for the user opening the workspace, use the last saved Only For Me formats.
2. If no Save Formats/Only For Me exists, use Save Formats/For My Groups: Administrators.
3. If no Save Formats/For My Groups: Administrators exists, use the default configured formats.

> **Note:** Save Formats only applies saved formats to newly created workspaces. Workspaces that are already created do not adopt these saved format changes

To save formats, complete the following steps:

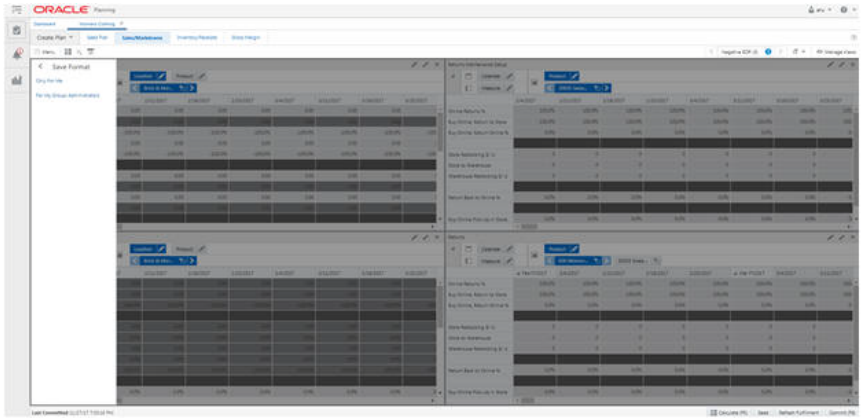
1. On the Quick Access toolbar, click **Menu** and click **Save Format**.

Figure 10–37 Save Format



2. Select one of the Format Level options:
   - **Only for Me:** Applies formatting to all future workspaces created for this task for only the original user.
   - **For My Group:** Administrators - applies formatting to all future workspaces created for this task for all users in the group. The last user to save using this option will overwrite any previous user's saves for the group.

Figure 10–38 Format Level



Deleting Formats

Delete Format has similar options to Save Format. The Delete Format options are:

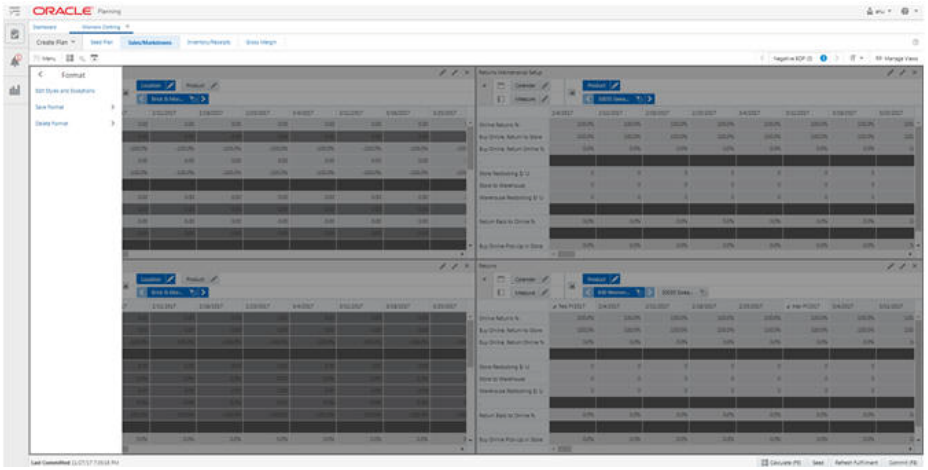
- **Only for Me:** If this option is used by any user, the Only for Me saved format is deleted for the current user only. No other users Only for Me saved format is deleted.
- **For My Group:** Administrators - If this option is used by any user, the For My Group: Administrators saved format is deleted for all users in the group. It is possible for user A to delete this group format saved by user B.

Note: Delete Format only deletes the saved formats that apply to newly created workspaces. Workspaces that are already created do not lose any previously applied saved formats.

To delete formats, complete the following steps:

1. On the Quick Access toolbar, click **Menu** and click **Delete Format**.

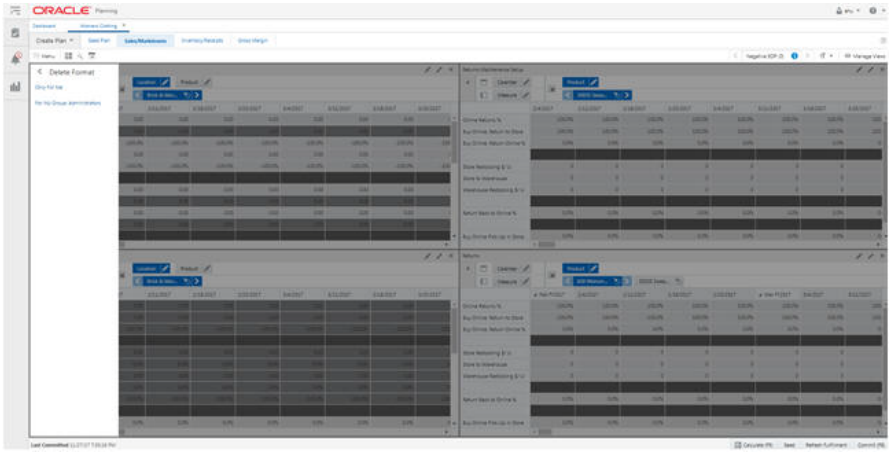
Figure 10–39 Delete Format



2. Select one of the Delete Format options:
   - **Only for Me:** If this option is used by any user, the Only for Me saved format is deleted for the current user only. No other users Only for Me saved format is deleted.
   - **For My Group:** Administrators - If this option is used by any user, the For My Group: Administrators saved format is deleted for all users in the group. It is possible for user A to delete this group format saved by user B.

Note: Delete Format only deletes the saved formats that apply to newly created workspaces. Workspaces that are already created do not lose any previously applied saved formats.

Figure 10–40 Delete Format Options



11

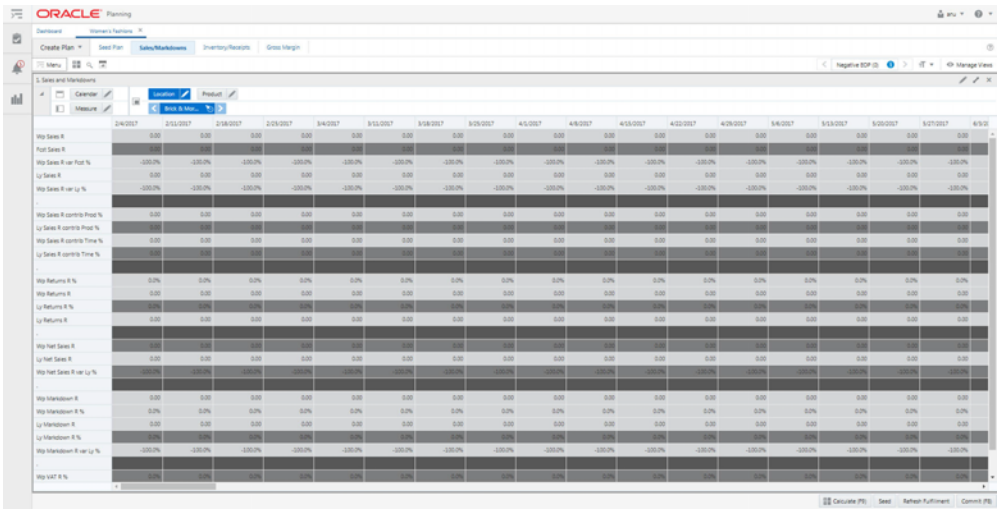
Export

When you use an RPASCE solution, you can export data in the current slice of a view to Microsoft Excel or to a text file. You can also print it.

As part of this functionality, you can adjust the page setup options before exporting the data. These default settings are persisted in the RPASCE for the selected view.

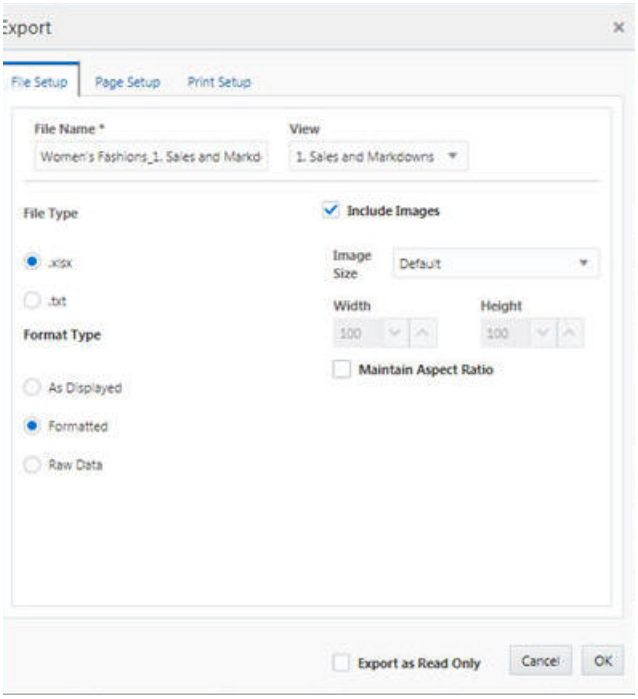
The Export option is located in the Quick Access Tool Bar menu, as shown in Figure 11–1.

Figure 11–1 Export Option



Click **Export** to display the Export dialog box.

Figure 11–2 Export Dialog Box



The export dialog box provides access to the following three tabs:

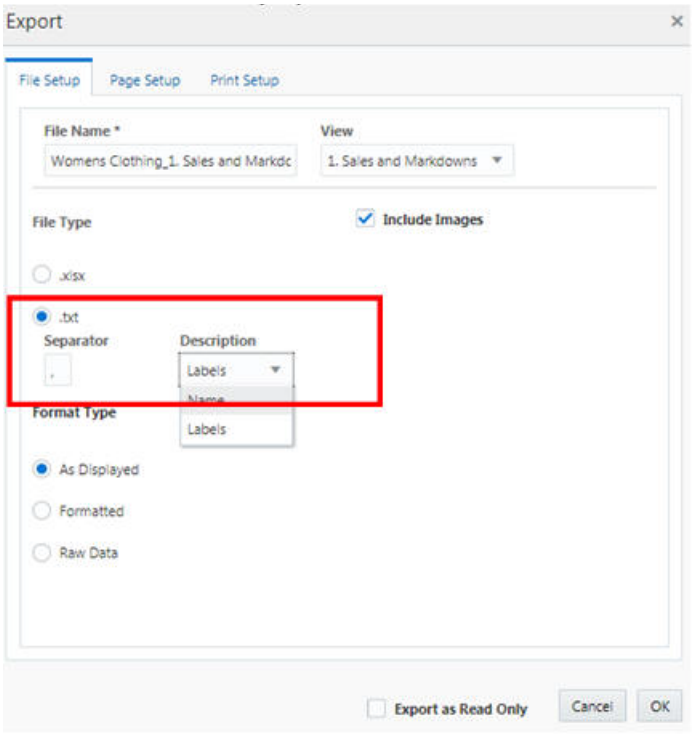
- File Setup
- Page Setup
- Print Setup

File Setup

You can use the File Setup tab to specify the file name, the view that you want to export, file type, format type, and whether or not to include images. These options are described in this section.

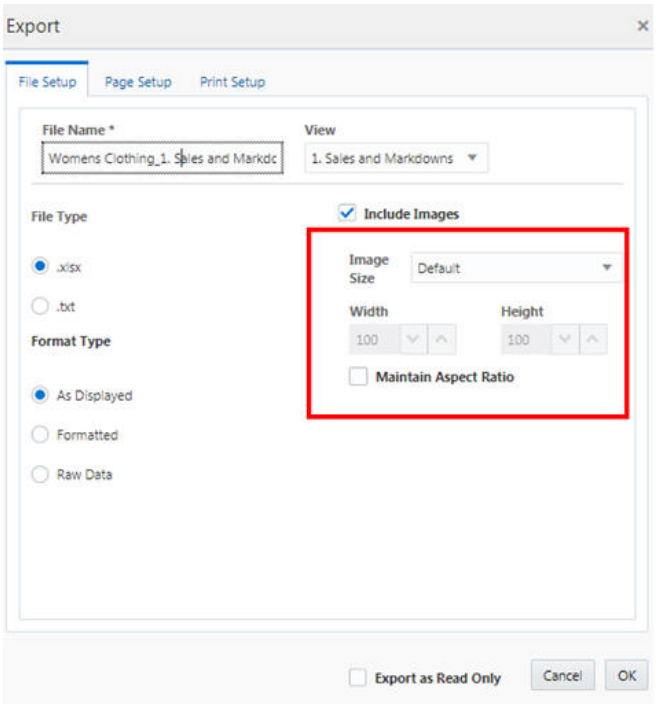
1. Enter the file name. The exported file has this file name.
2. Select the view that you would like to export.
3. Choose the file type for the exported file. File types are either Text or Microsoft Excel.
   - When you select Text, you see the options to select the Separator and the Description. Description has two options:
     - **Labels:** display the labels for measures
     - **Names:** display the names for measures

Figure 11–3 Text File Type



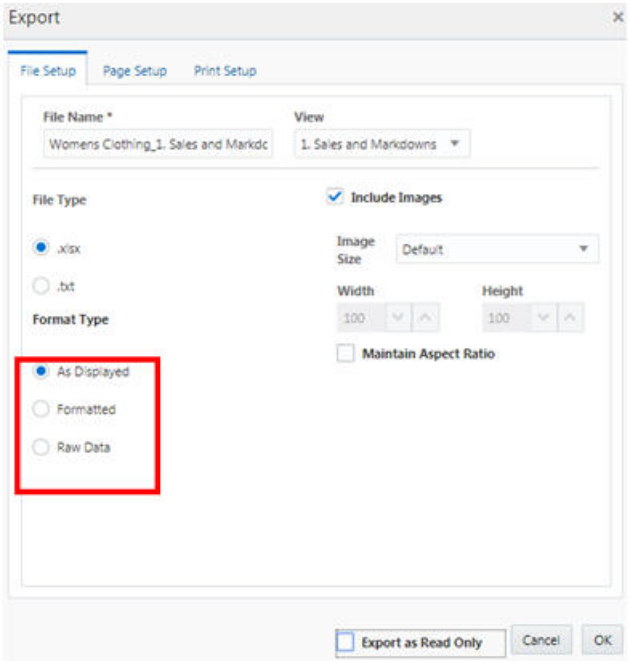
- When you select Microsoft Excel, you have access to the options Image Size, Maintain Aspect Ratio, and Format Type.

Figure 11–4 Excel File Type



4. Use Format Type to specify the way that you want the data to be exported using the following three options:

Figure 11–5 Format Type



- **As Displayed:** the data is exported as it appears in the Content area.
- **Formatted:** the data is exported in raw format (that is, the RPASCE formatting has been removed) and the Excel-based formatting is automatically applied within Excel.

  Only the formatting specified in RPASCE is applied in Excel. After the data is exported, you can apply more formatting within Excel.

  This option is for the Text file type option.
- **Raw Data:** the exported data in the text file appears without number formatting.

  For example, if you have entered 12588.687 and the number formatting is configured to have a scale of 1, a precision of 2, the separator turned on, and a prefix of $, the number appears as $12,588.69 in the pivot table. This number appears in the text file in the following ways, depending on the exported format type:

  – **As Seen:** $12588.69

  – **Formatted:** $12,588.69 (the raw number, 12588.687, is formatted in Excel to display as $12588.69)

  – **Raw:** 12588.687

Note: Data types other than integer and float are not supported. If a view contains columns with data types other than integer and float, the data is exported as it appears in RPASCE. If a workspace view contains a mix of columns with integer or float data types with other data types, the exported file contains the appropriate formatting for the supported data types based on the options selected during the export. Data in the columns of the unsupported data types appears as it is seen in RPASCE.

Date or any type of picklists are exported as a string.

Boolean data types are exported with formatting compatible with Excel.

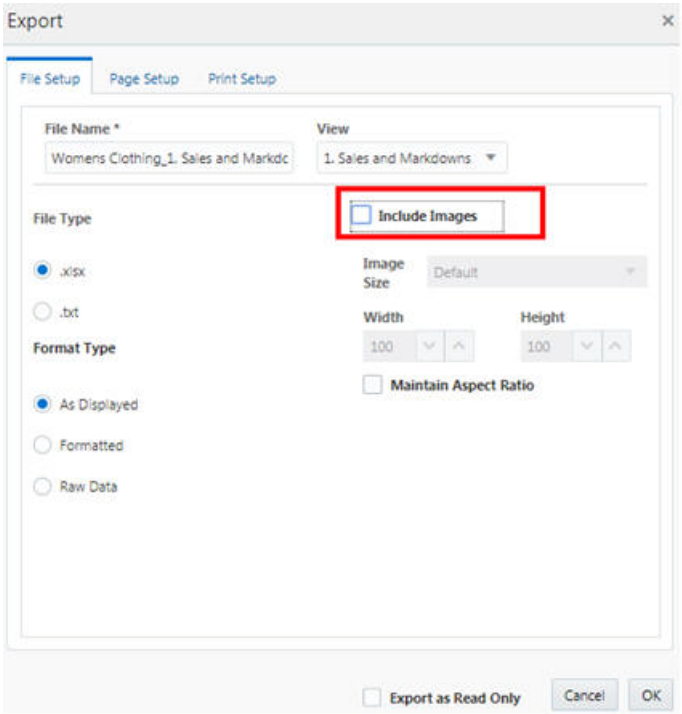
When you use the formatted option and use a scale factor of anything besides 1000, the value in Excel is displayed as the raw formatted value, not the scaled formatted value. For percentages, a scale factor of .01 displays as a percent in Excel.

Note: The Separator and Descriptions options do not apply to Microsoft Excel exports.

5. By default, the Export Images check box is checked. This allows any images that are included in the view to be exported, along with other data. The Image URL is exported along with the Image format and size.

   When you uncheck the Export Images check box, RPASCE does not export the image details.

Figure 11–6 Include Images

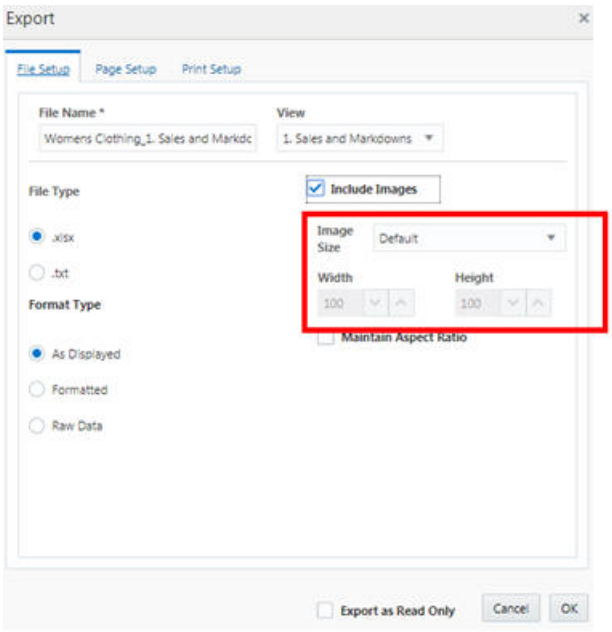


6. Select the image size of the exported images from the drop-down menu. This option is available only for Microsoft Excel. The three available values are Default, Large, and Custom.

   The image size associated with the Default option and the Large option can be changed by the administrator. The default values are set for both the cell width and the cell height.

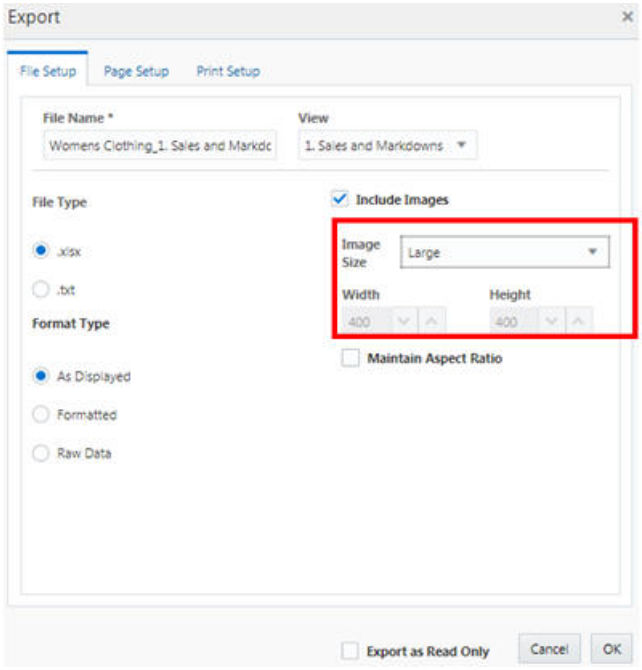
   - Default Option, the width and height specified as 100 x 100.

Figure 11–7 Default Option



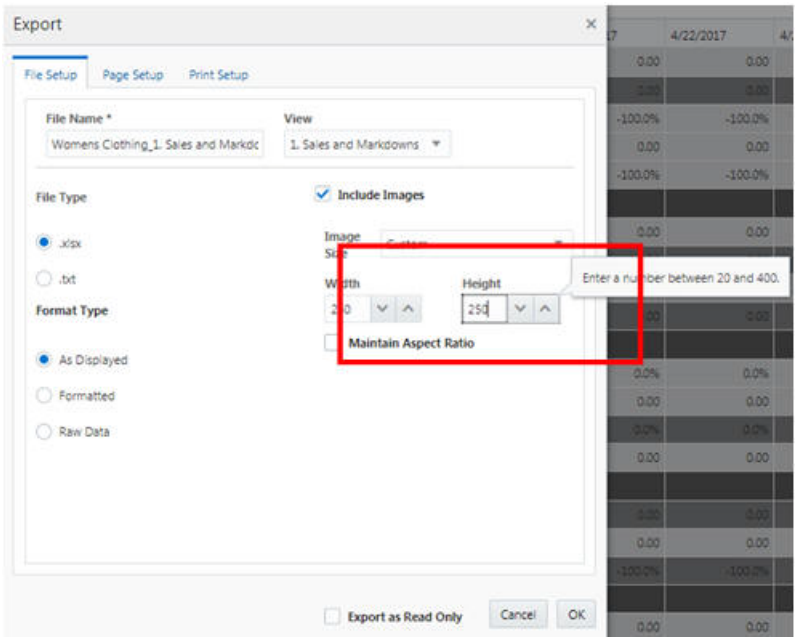
   - Large option, the width and height specified as 400 x 400.

Figure 11–8 Large Option



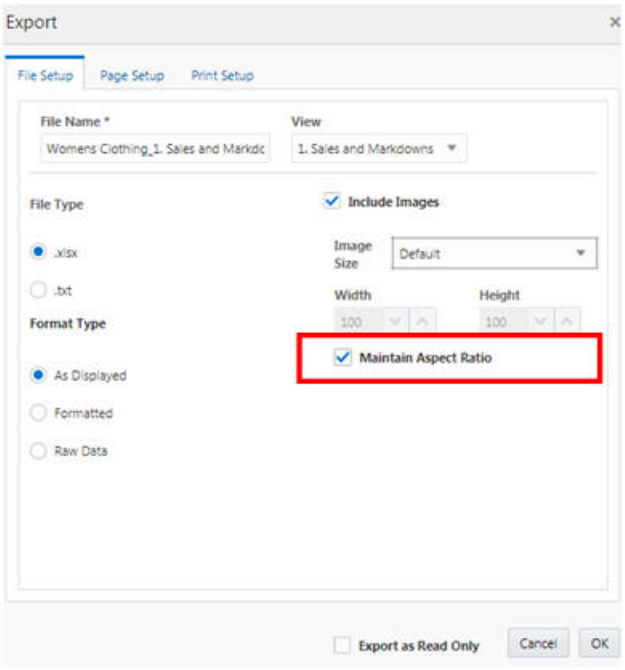
- Custom option specifies a custom size within the bounds set by the administrator for the image cells in Excel. You can specify the width and height for the images.

Figure 11–9 Custom Option



7. Use the Maintain Aspect Ratio in order to maintain the actual image aspect ratio. If not selected, the image aspect ratio can be stretched to the specified size.

Figure 11–10 Maintain Aspect Ratio



Page Setup

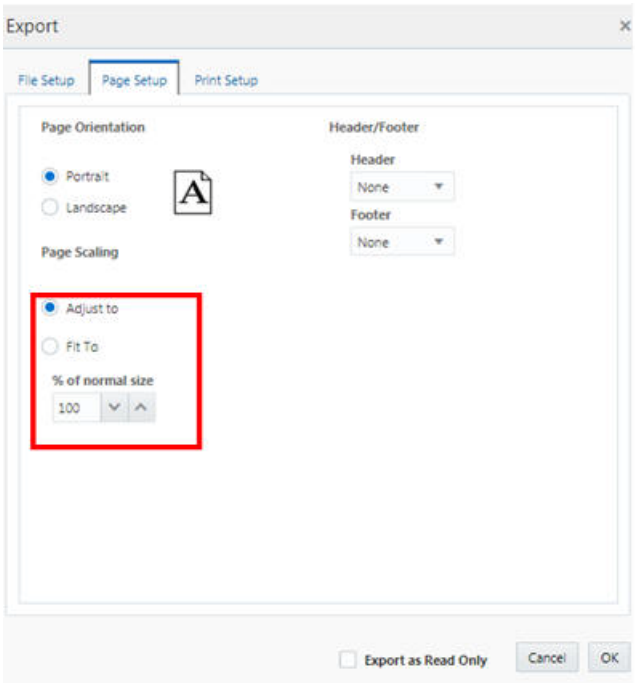
You can use the Page Setup tab to specify the page orientation, page scaling, and the header/footer. These options are described in this section.

Page orientation indicates the way in which a rectangular page is oriented for normal viewing. The two option are portrait and landscape. In Portrait mode, the page is taller than it is wide. In landscape mode, the page is wider than it is tall.

Page scaling has two options:

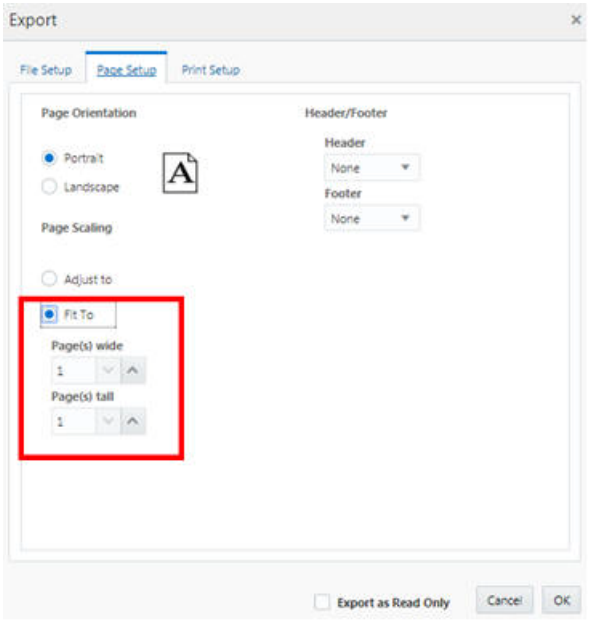
- Adjust to is the % of Zoom to normal size. By default 100% is displayed. You can either adjust the value using the up and down arrow keys or type in the % value to zoom.

Figure 11–11 Adjust To



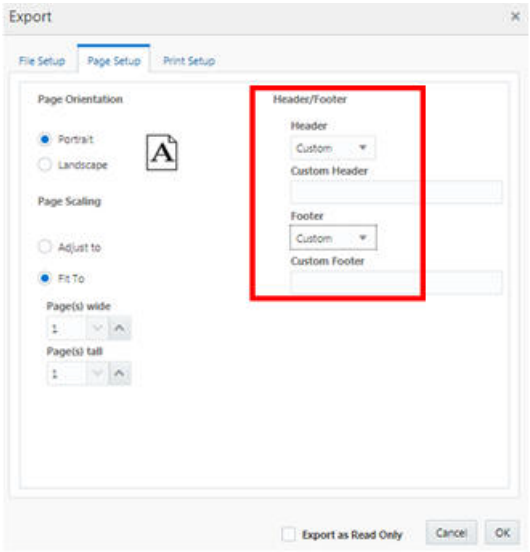
- Fit To is used to scale the document to fit the pages width and tall. By default, 1 is displayed. You can either use the up and down arrow keys or type in a value to scale the page dimensions.

Figure 11–12 Fit To



To specify the header and the footer, select **Custom** and add the header and the footer. By default, the Header and the Footer are specified as none.

Figure 11–13 Header/Footer



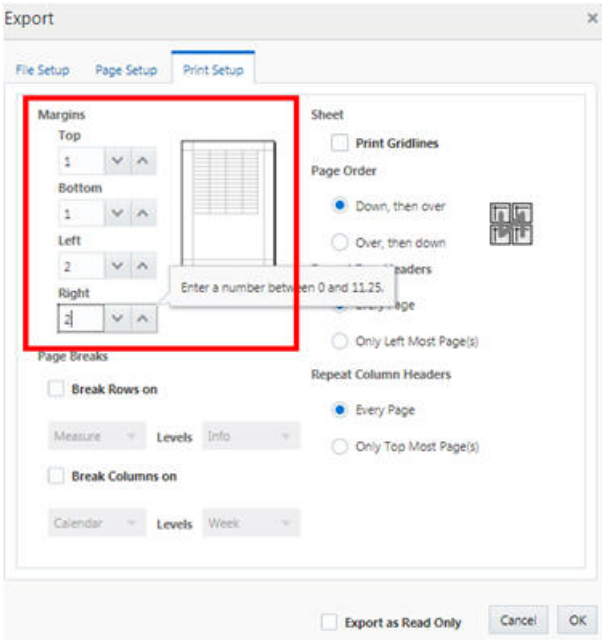
Print Setup

You can use the Print Setup tab to specify the page margins, page breaks, print grid-lines, page order, repeat headers, and repeat column header. These options are described in this section.

Margin is the area between the main content of a page and the page edges. Use the margin to define where a line of text begins and ends. When a page is justified, the text is spread out to be flush with the left and right margins.

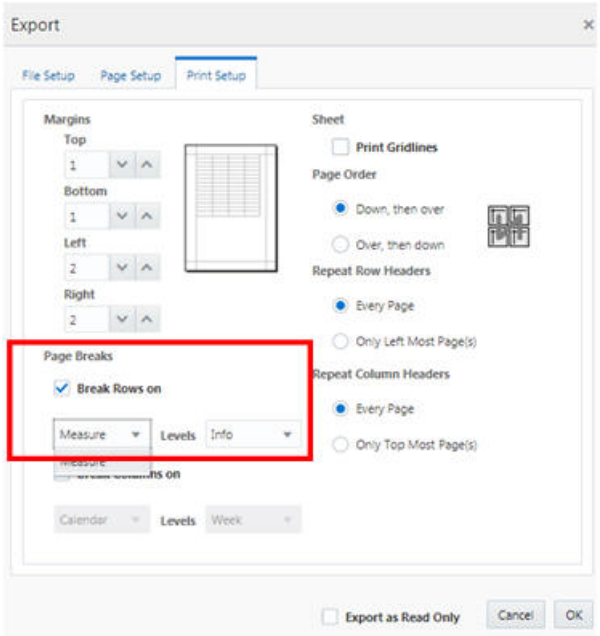
You can specify Top, Bottom, Left, and Right margins.

Figure 11–14 Margins



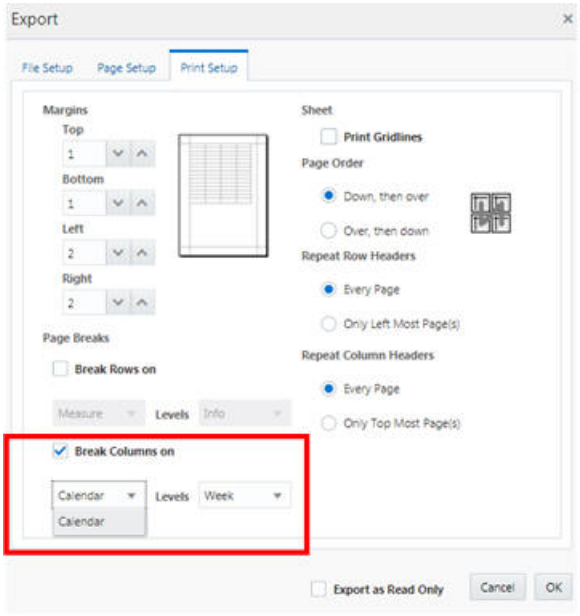
If you want space between the rows, select **Break Rows on**. This is used to select the *x*-axis dimensions of the selected view. If more than one, then both values are shown.

Figure 11–15 Page Breaks On



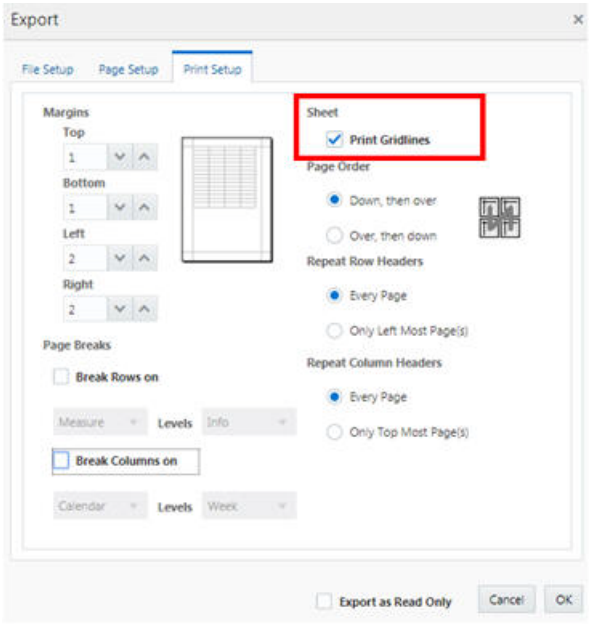
If you want space between columns, select **Break Columns on**. This is used to select the Z-axis dimensions of the selected view. If more than one, then both values are shown.

Figure 11–16 Break Columns On



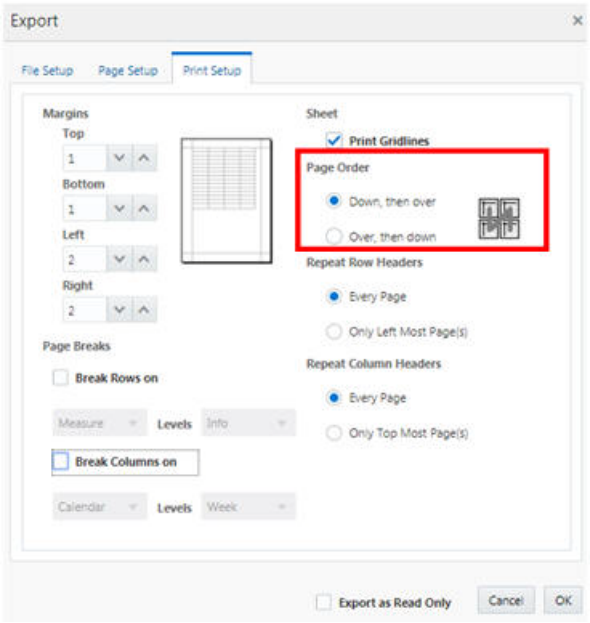
Use the print Gridlines option if you want the gridlines to be printed.

Figure 11–17 Print Gridlines



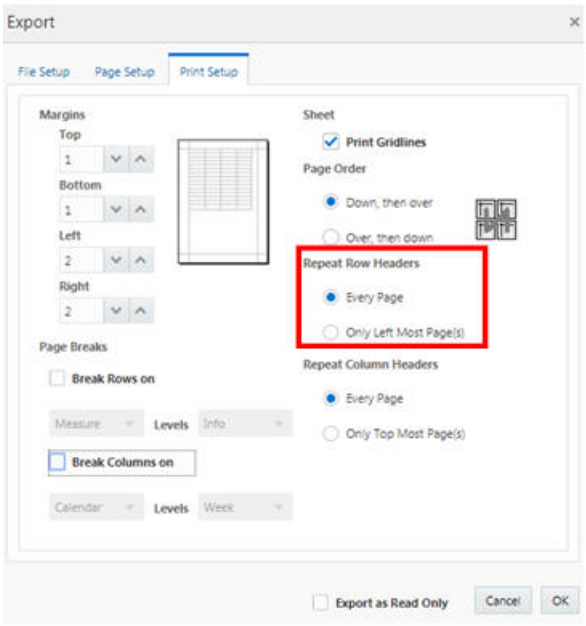
Use Page Order to specify either Down, then over or Over, the down.

Figure 11–18 Page Order



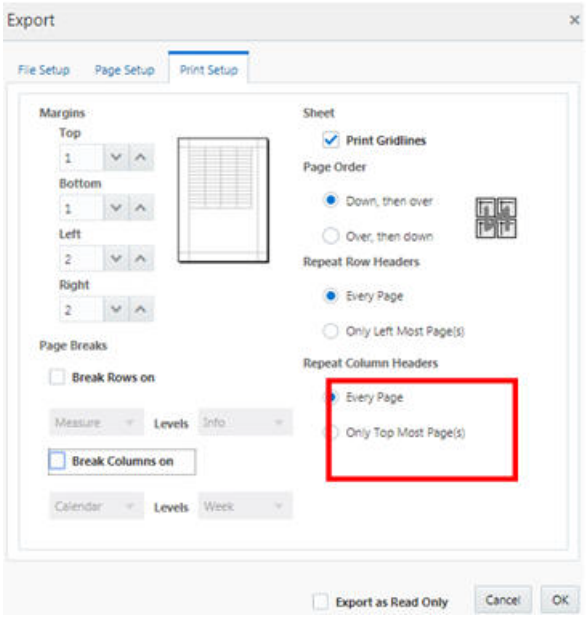
You can either repeat row headers every page or only on the left-most page.

Figure 11–19 Repeat Row Headers



You can either repeat column headers every page or only on the top-most page.

Figure 11–20 Repeat Column Headers

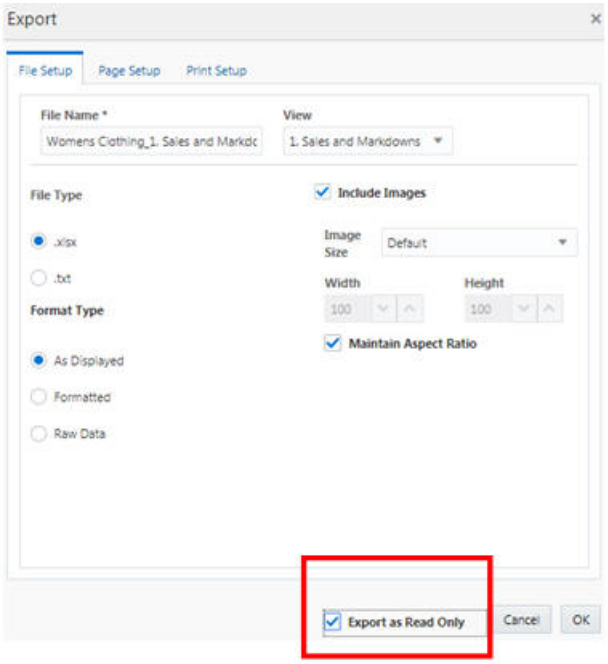


After Setup

After you have completed file setup, page setup, and print setup, you can do the tasks described in this section.

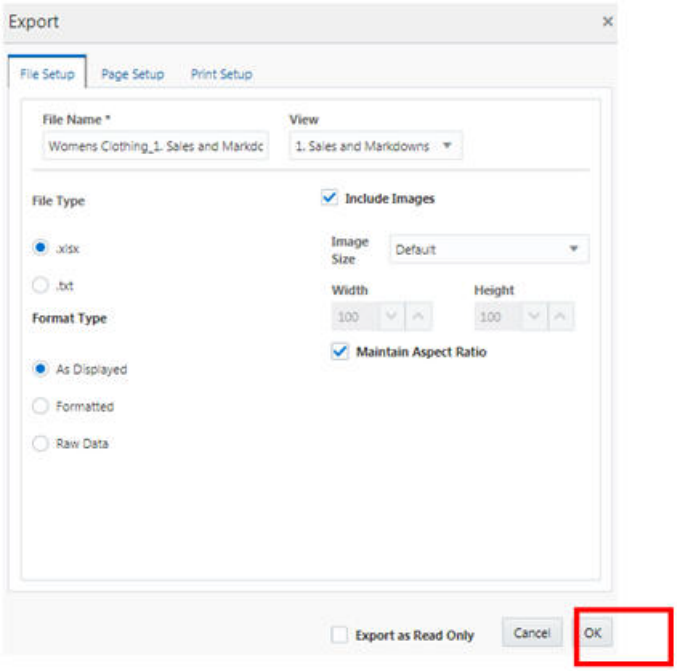
If you want the exported data to be read-only, select **Export as Read Only**. This prevents the data from being updated when it is opened after the export.

Figure 11–21 Export as Read Only



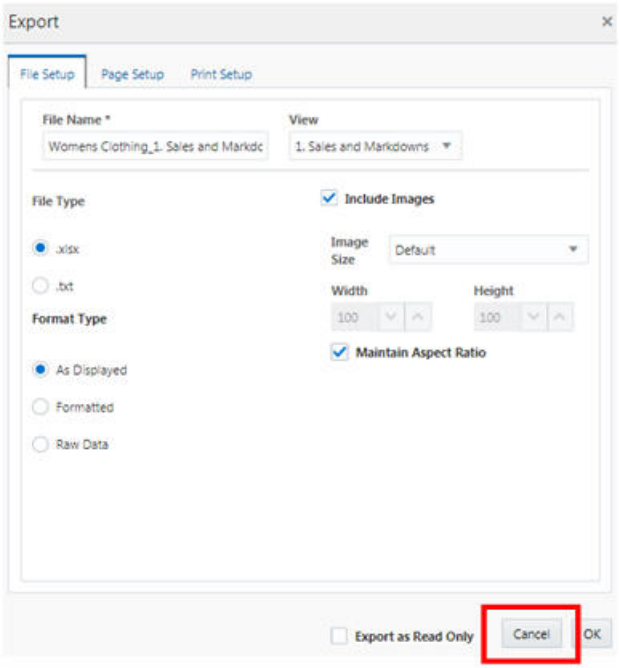
Click **OK** to download the view as specified and close the Export dialog box.

Figure 11–22 Download View



Click **Cancel** to exit the export dialog box without downloading.

Figure 11–23 Exit Export



12

Real Time Alerts

Real time alerts are interactive alerts that are displayed when you open a workspace or view. They can then be manually updated by users. Data outside of specified parameters is highlighted. After you have modified the data to a suitable value, click **Calculate** to clear the alert. This lets you systematically work through and clear a particular set of problems. The alerts are then updated each time you edit data and click Calculate.

Configuring Real Time Alerts

Real time alerts are configured in the RPASCE Configuration Module, which is normally only accessible by Administrators. This section gives a brief overview of how these alerts are configured. It is intended to give some background information for users with access to the RPASCE User Interface only.

Alert Definition

Real time alerts are configured in workspace view templates and appear in the workspace built using those templates. An alert definition specifies a number of conditions, each with styles and a message, that the alert can detect and display. Alert hits are determined by a designated alert measure, which uses a rule to calculate a condition identifier representing each hit at a designated alert intersection. These hits are then displayed in the cells of a designated target measure at that same intersection. The alert definition also contains a priority that is used when multiple alerts are raised on the same target measure cells.

Alert Measure

The alert measure is calculated by a rule that detects the conditions for the alert. For example, an alert measure FcstAlert may be computed by the following rule:

FcstAlert = if(FcstQty <=300, "tooLow", if(FcstQty >=600, "tooHigh",""))

In this example, tooLow and tooHigh are condition identifiers, which the alert definition associates with a style and a message. The alert measure does not have to be visible in any views.

Target Measure

The alert definition specifies a target measure in which the hits appear. This may be a measure used in the alert measure's rule, for example, FcstQty above, but does not have to be. When an alert measure computes a condition for a cell, the corresponding

target measure cell represents the alert hit and is formatted. and navigated to, accordingly.

The target measure cells must be visible at the alert intersection for hits to be shown. The target measure can be the same as the alert measure, if desired. The same measure may be used as the target for a number of different alerts. In the case of colliding hits, the alert's priority is used to determine which alert formats the cell, but the cell will be navigated to for any of the alerts present.

Condition Definitions

For each condition that can be produced by the alert measure's rule, a style can be defined. You can modify the styles via the Format dialog in Edit Styles and Exceptions. The styles are used to format target measure cells with the condition, and the message is displayed as part of the tooltip information that appears when you mouse over hit cells.

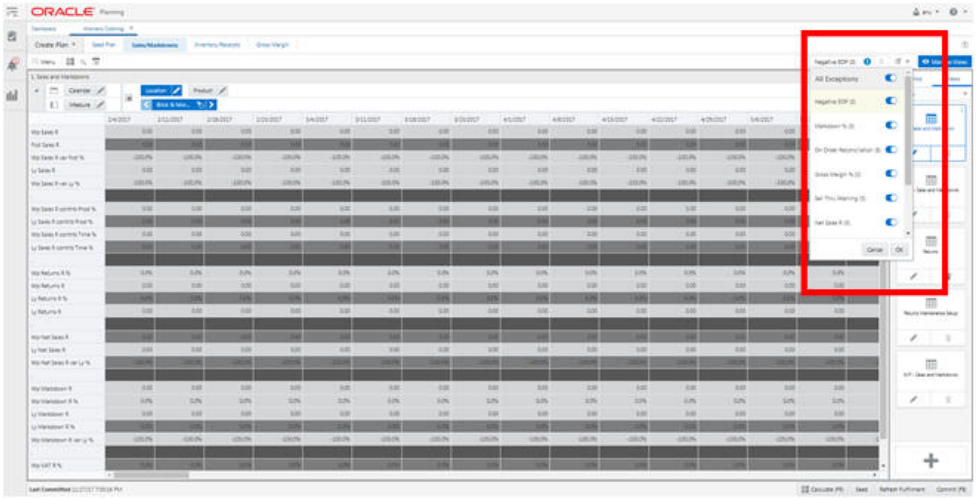
Working with Real Time Alerts

When you open a workspace, the real time alert hits are calculated and displayed. They are refreshed every time you click Calculate or invoke operations such as Custom Menu Executions or as part of the Commit process.

Alerts on the Quick Access Toolbar

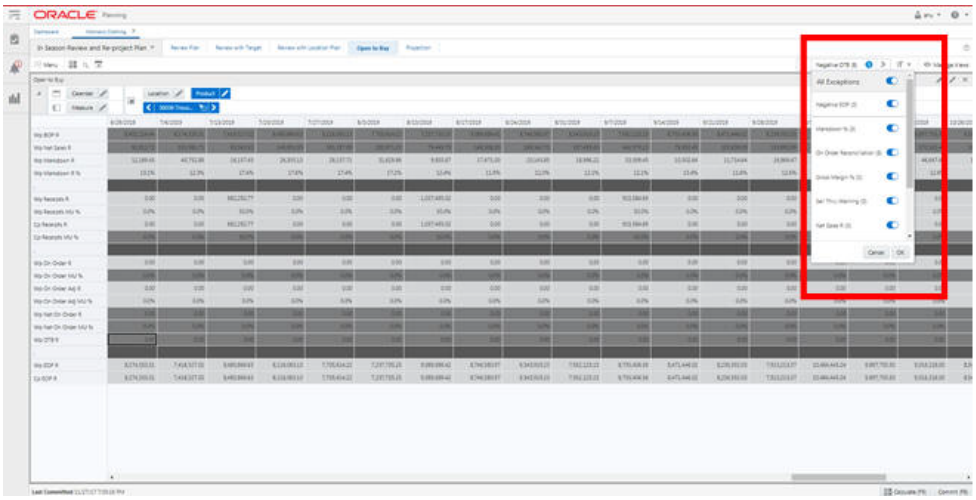
The toolbar contains an exception list that shows all the available alerts. Users can choose either all exceptions or the exceptions that are priority for resolution. The number beside the icon shows the number of hits for the currently active real time alert for the entire workbook.

Figure 12–1 Quick Access Toolbar



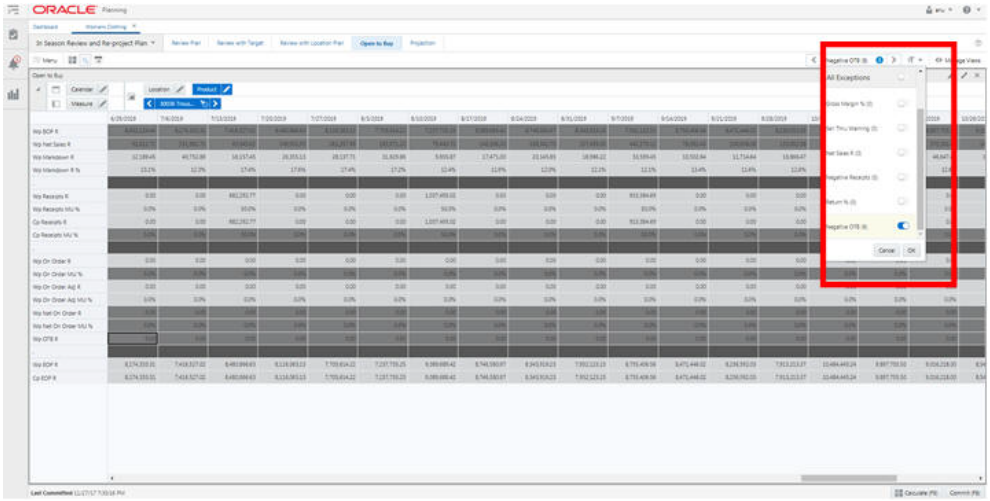
Click **All Exceptions** and then **OK** to select all the exceptions for alert navigation.

Figure 12–2 Select All Exceptions



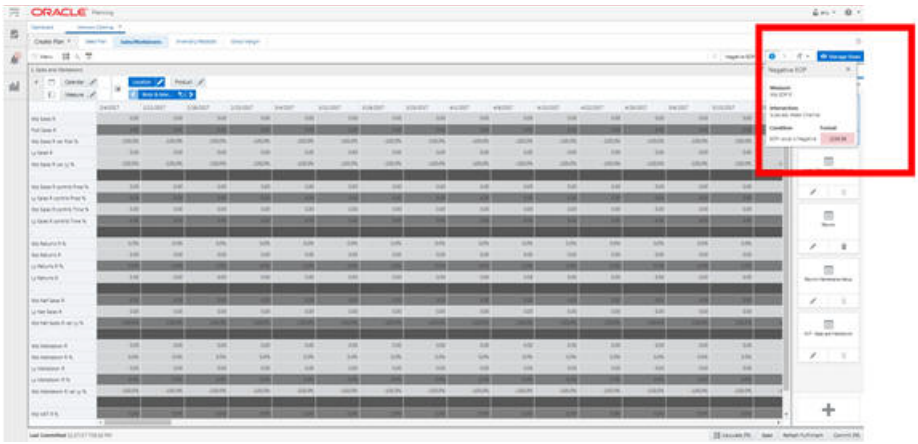
You can either select one or multiple exceptions.

Figure 12–3 Select Multiple Exceptions



Click on the information icon to launch the alert summary of the particular selected alert. It displays the alerted measure, intersection, alerted condition, and format that was chosen to highlight the alerted cells.

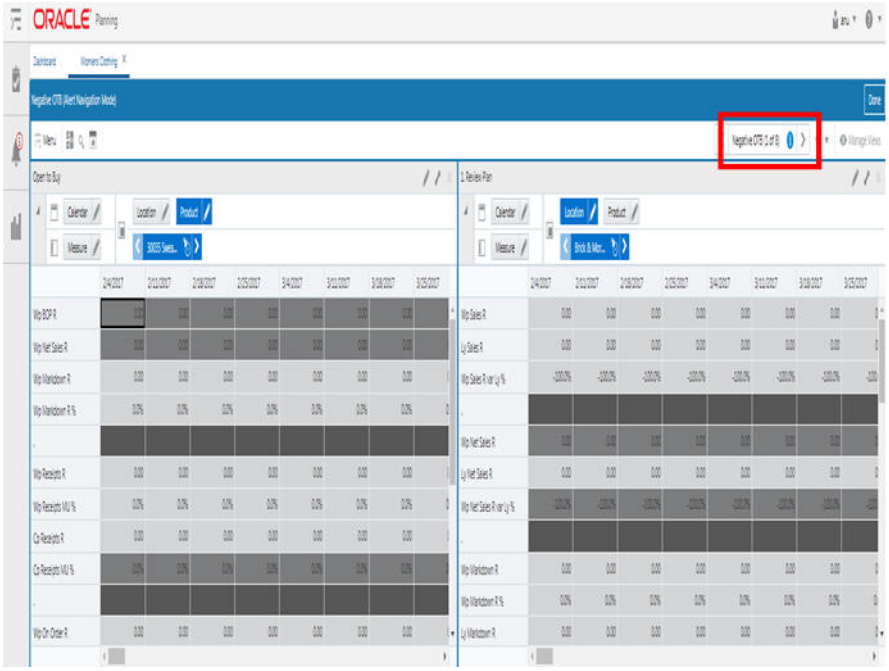
Figure 12–4 Alert Summary



Alert Navigation

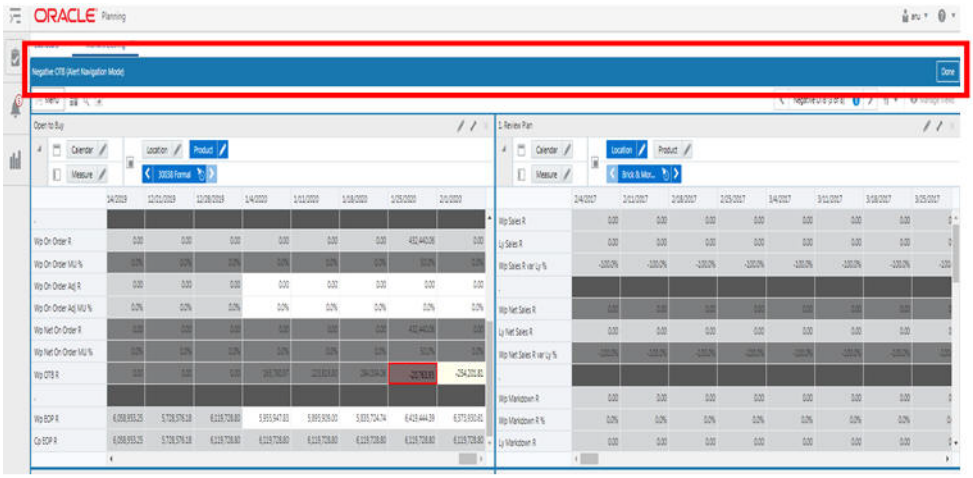
Clicking on right arrow launches the alert navigation mode. Use this to navigate between the various alerted intersections present in the specified view.

Figure 12–5 Alert Navigation



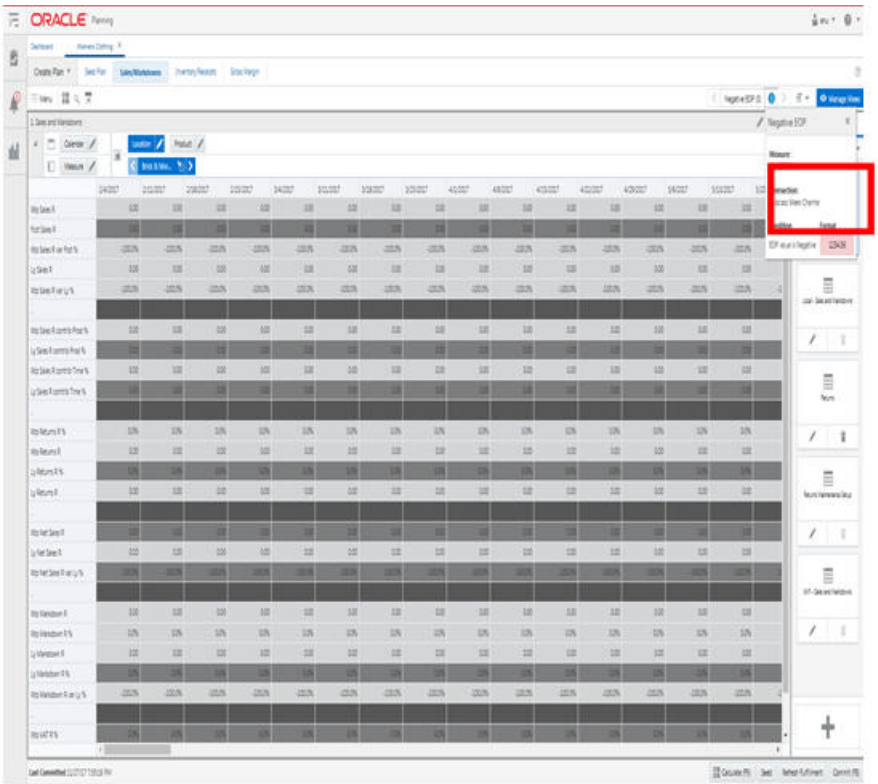
You can see that now you are in alert navigation mode, as highlighted in Figure 12–6.

Figure 12–6 Alert Navigation Mode



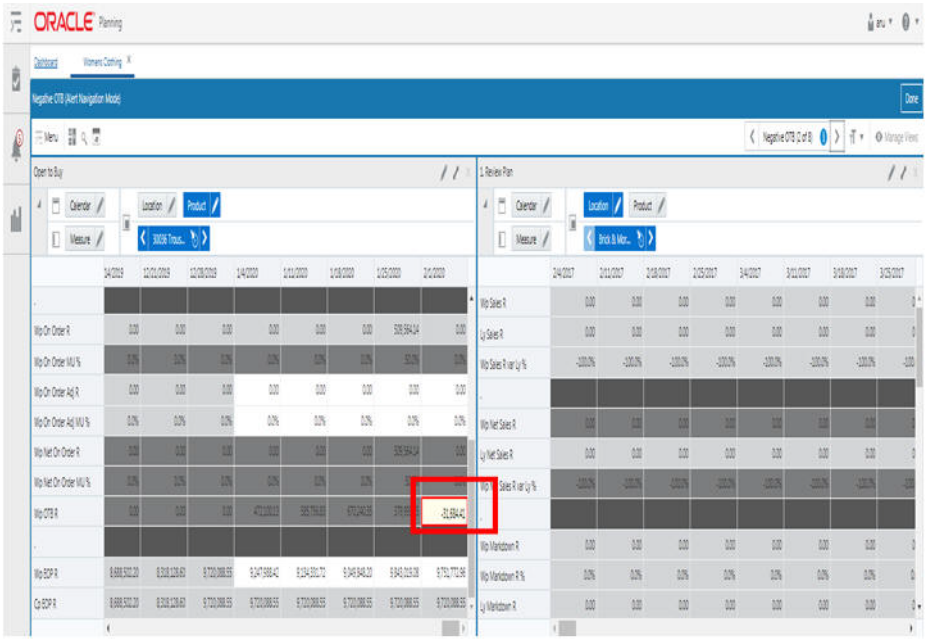
Sometimes, a warning message indicates that the alert hits are invisible. You can check the alert summary to view the alert intersection and make sure that your view reflects the same intersection so that the alerted positions can be highlighted.

Figure 12–7 Alert Intersections



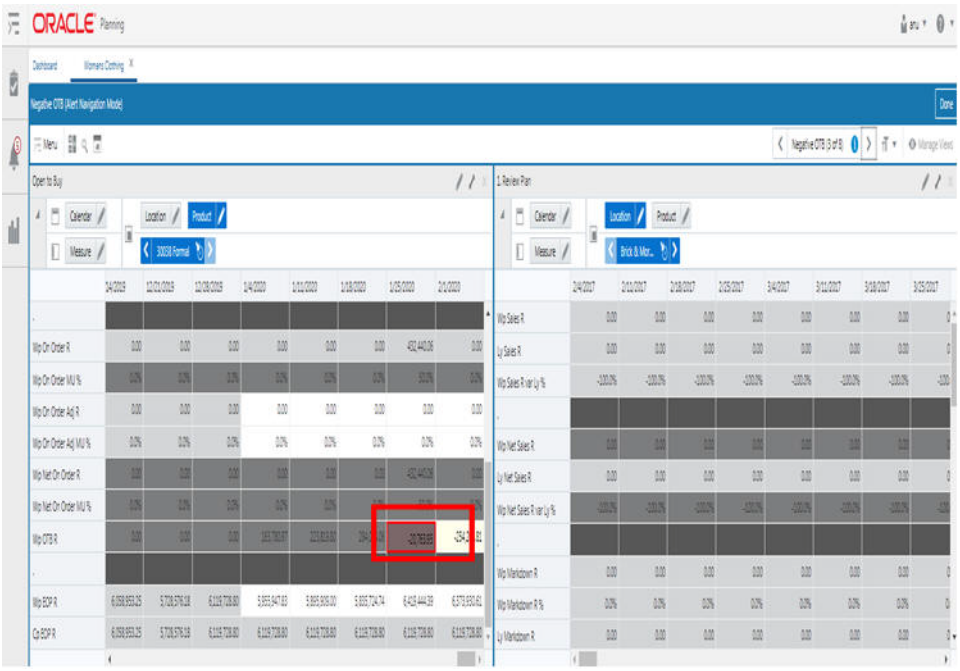
Once the alerted intersections are highlighted in the required intersections as specified in alert summary, you can resolve them one by one.

Figure 12–8 Alert Position



Click **Next** to move to the next selected alert until you resolve all the alerted positions.

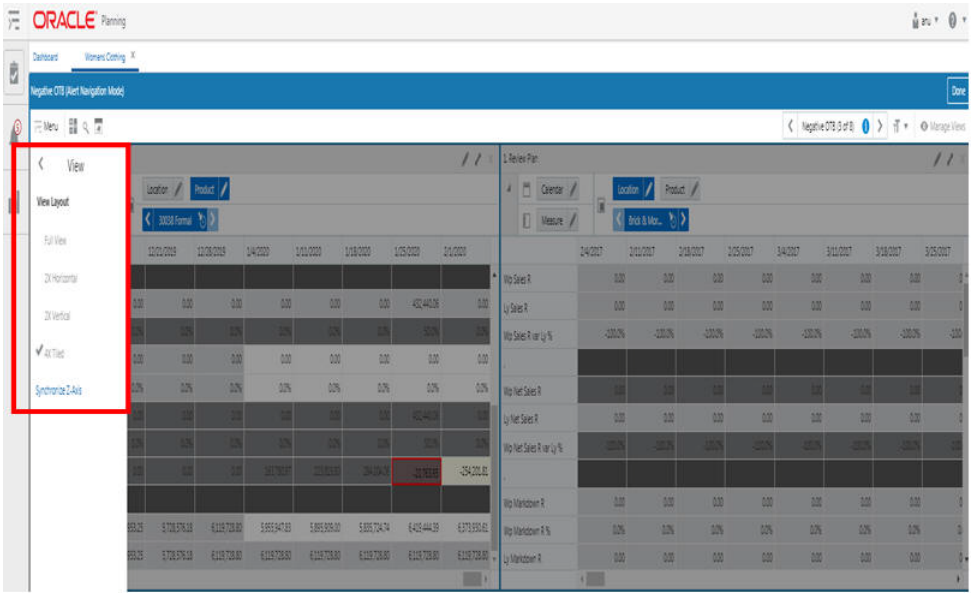
Figure 12–9 Moving Between Alerts



In alert navigation mode, the rows, columns, and pages in the workspace view are restricted to those with the currently selected real time alert. These rows are not dynamically updated. The same rows, columns, and pages remain visible after a calculation changes the data.

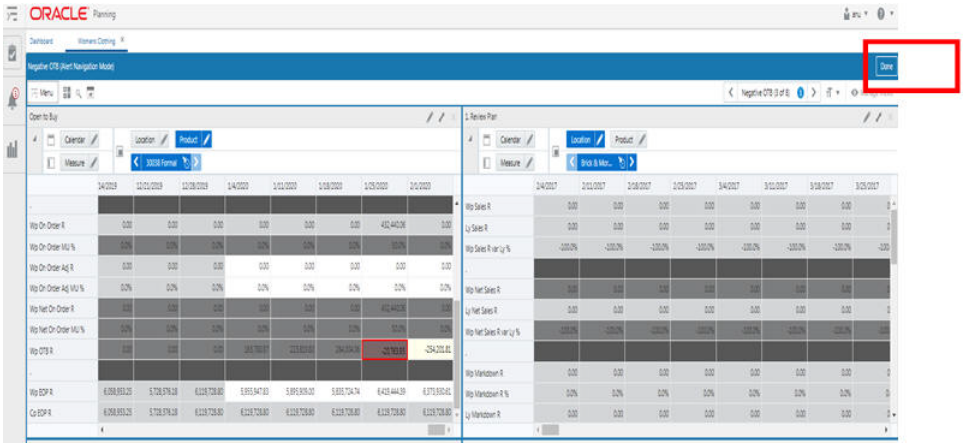
You cannot change the view layout or navigate to different view in the alert navigation mode.

Figure 12–10 View Layout



You can exit the alert navigation mode by clicking **Done**. To hide the alerts, deselect the Alert in the Exception list.

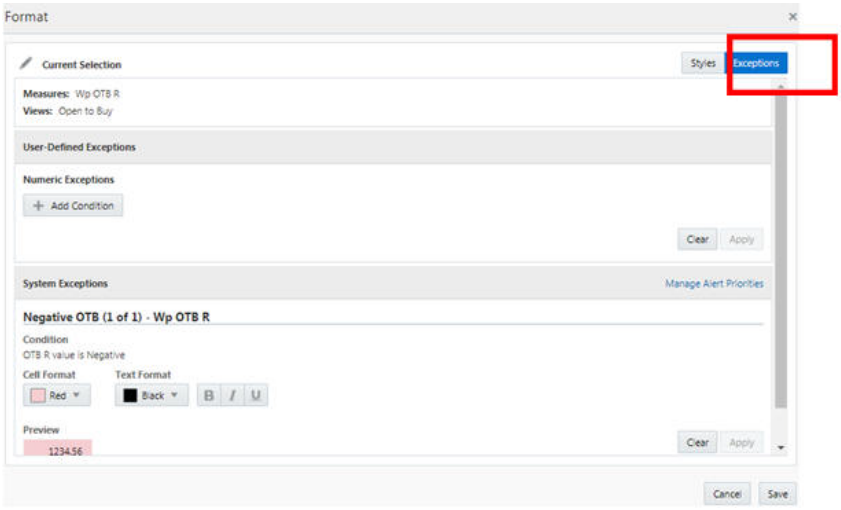
Figure 12–11 Exit Alert Navigation Mode



Alert Formatting

Click **Format** to edit styles and exceptions. The current format applied to the active alert, along with a summary of the calculation for the conditions, can be edited. You cannot add any system exceptions, as they are added in the RPASCE configuration. You can add any user-defined exceptions and specify the preferred format used to notify you and prioritize the condition over the system alert. The alert priority can be specified in the alert definition when multiple alerts are raised on the same target measure cells. You can prioritize the user-defined exception over the system exception also. You can also save or delete the Alert styles for you or your group.

Figure 12–12 Alert Formatting



Addressing Alerts

After editing the data to address problems associated with a number of alerts, you can use the Calculate option. Once the results are recalculated, some real time alerts are cleared. In addition, other real time alerts may be generated.

Real Time Alerts in the Workspace

Real time alerts in the workspace are shown by highlighted cells. The highlighting consists of a combination of text color, background color, and font style.

Where a view has large numbers of alerts, you can filter the alerts to choose specific exceptions instead of all exceptions.

You can then systematically work to clear the real time alerts in the view by:

- Navigating to a specific real time alert and identifying its nature from its summary in the alert summary.
- Editing the value of any cell referenced by the rule to calculate the alert.
- Clicking Calculate to update the view.
- When you click calculate, if an appropriate value has been entered into the cell, the alert should clear.

You can then periodically commit the changes to save them back to the multidimensional database.

13

Special Features

This chapter describes special RPASCE features that you can use.

Overview of What-If Scenarios

What-if scenarios are strategic method for scenario planning that a planner can use to make flexible plans while keeping the original scenario intact. These are additional plan versions that are created to simulate outcomes with different inputs. You use what-if scenarios to maintain and re-forecast the primary plan while preparing a stretch plan to quickly react to upward trends or more aggressive business growth targets.

You can perform what-if analysis with different KPIs and strategies from relatively simple, tactical decisions to the complex strategic planning. You can then promote the what-if scenario to be the primary plan.

You can also see all the scenarios of the plan from the Recent Plans section of Dashboard.

Working with What-If Scenarios

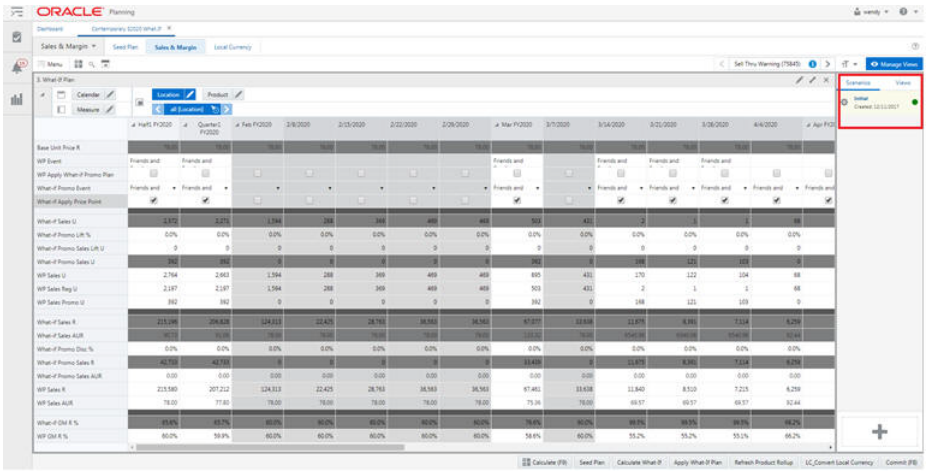
As a planner, you make a number of decisions that affect your plans. These decisions can be complex and you may spend a significant amount of time developing a potential plan before you know if it is optimal or not. Since the workspace contains a single version of the plan, you cannot compare different potential approaches in the workspace to decide which is best.

In order to address these difficulties, RPASCE provides what-if functionality. You can work within the segment workspace to create a plan. You can select between alternative approaches and create scenarios to evaluate a potential approach. These scenarios provide a copy of your main plan-in-progress. While you are working on a scenario, the changes you make only affect the data in the scenario and do not impact the main plan.

In order to prevent the mixing of data from multiple scenarios, the master scenario is provided. When a segment is built into a workspace, the initial data set is the only one present and so is the master data set. As you create more scenarios, the master scenario remains privileged as the only version that sends commits back to the domain. After you develop a scenario, you select that scenario as your plan.You use a promotion process to replace the master scenario with the selected scenario. That scenario becomes the new master scenario for all future operations performed within the workspace.

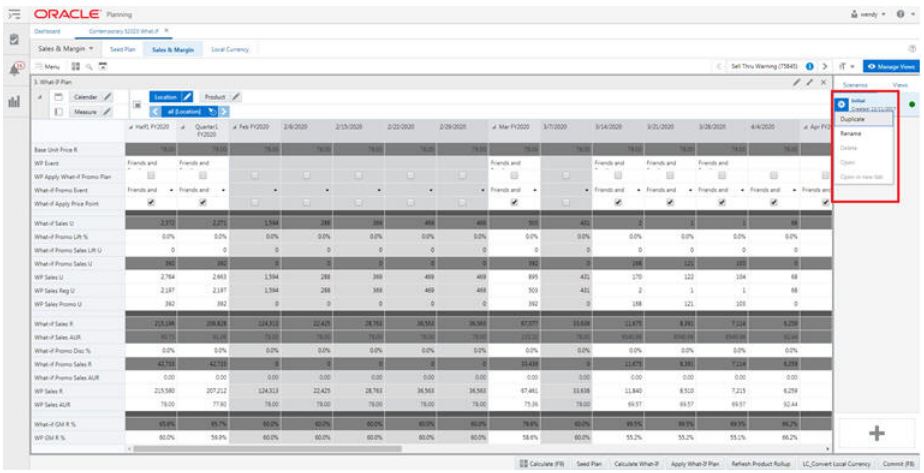
Figure 13–1 illustrates the main scenario and the green icon that identifies it.

Figure 13–1 Master Scenario



You cannot delete the master scenario. Since it is already open, the Open and Open in new tab options are also disabled. You can either duplicate the scenario to create another scenario or rename the scenario.

Figure 13–2 Duplicate Scenario

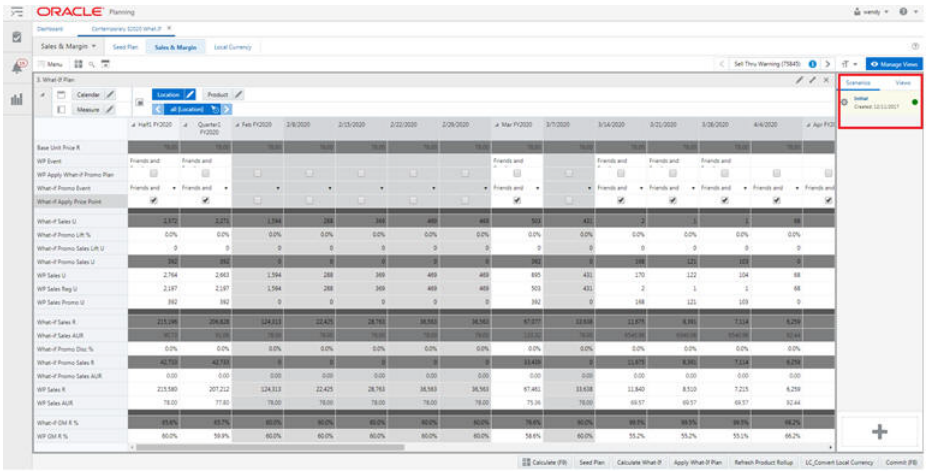


Click **Duplicate Scenario** and enter the appropriate label, and click **OK** to create a new scenario. You cannot use an existing label from the current workspace.

Figure 13–3 Name Duplicate Scenario

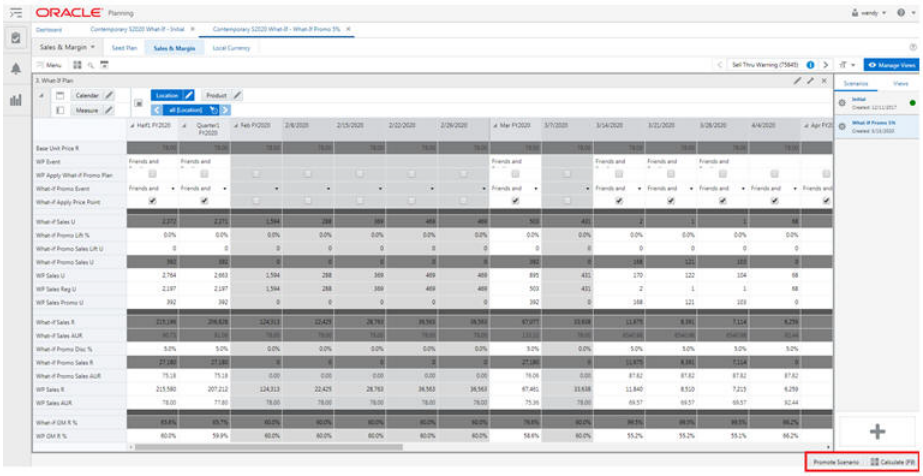
The new scenario is created and you can clearly differentiate the master scenario as follows.

Figure 13–4 Master Scenario Identification



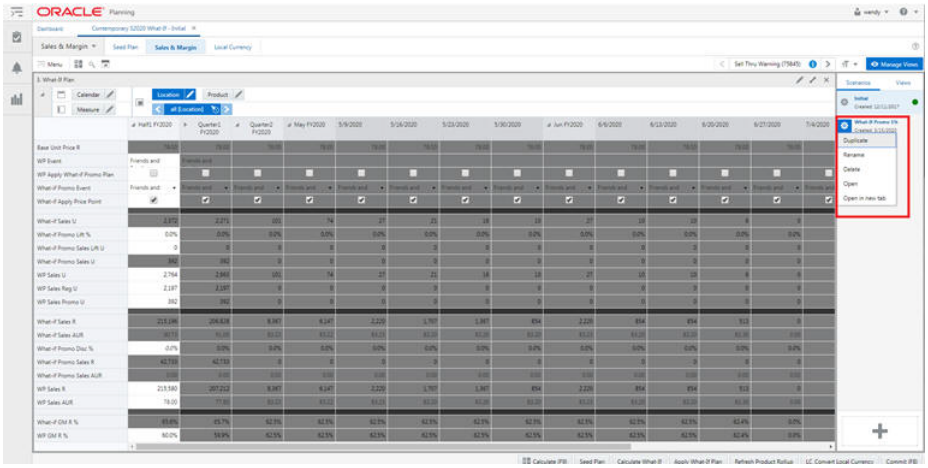
Unlike the master scenario, the what-if scenarios cannot commit the data to the domain, as these scenarios are working copies. No action items are visible, except to promote the scenario to master scenario.

Figure 13–5 What-If Scenario



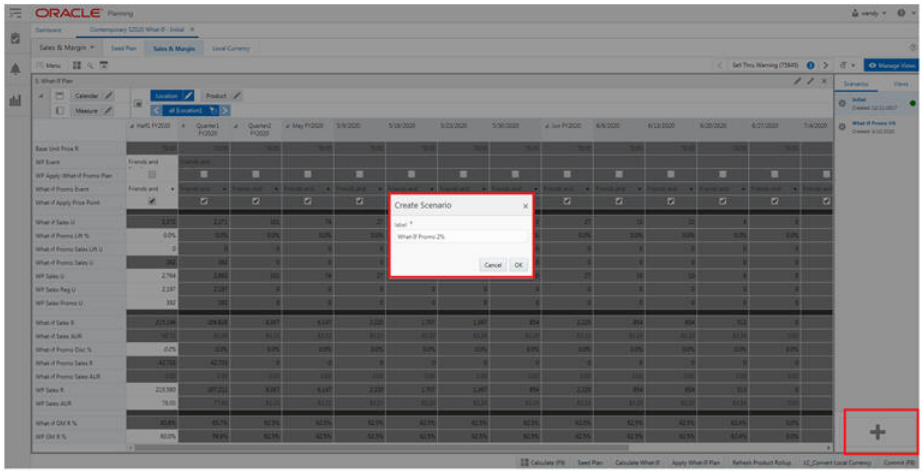
The actions Duplicate (to duplicate the scenario and create new one), Rename (to change the label of the scenario), Delete (to delete the scenario), Open (to open the scenario in the current browser window), and Open in new tab (to open the scenario in new browser tab window) are shown in Figure 13–6.

Figure 13–6 Actions Performed on a Scenario



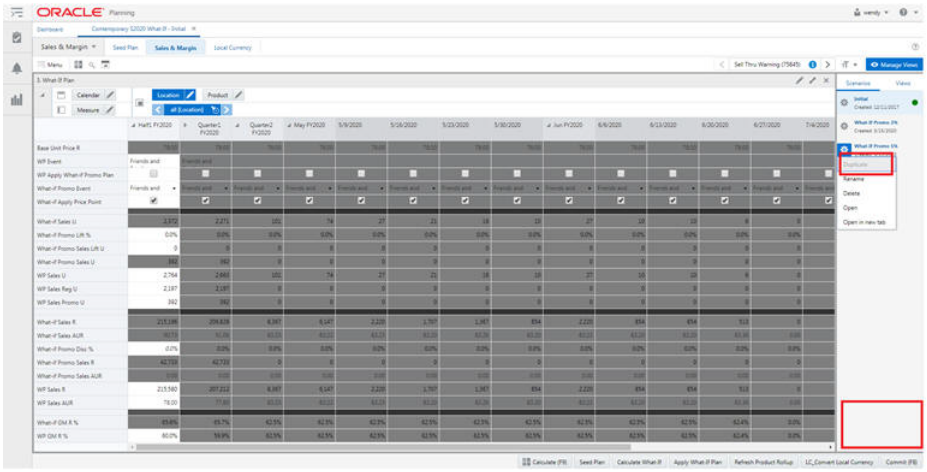
You can also create the scenario by using the + icon in the Scenarios section.

Figure 13–7 Create Scenario



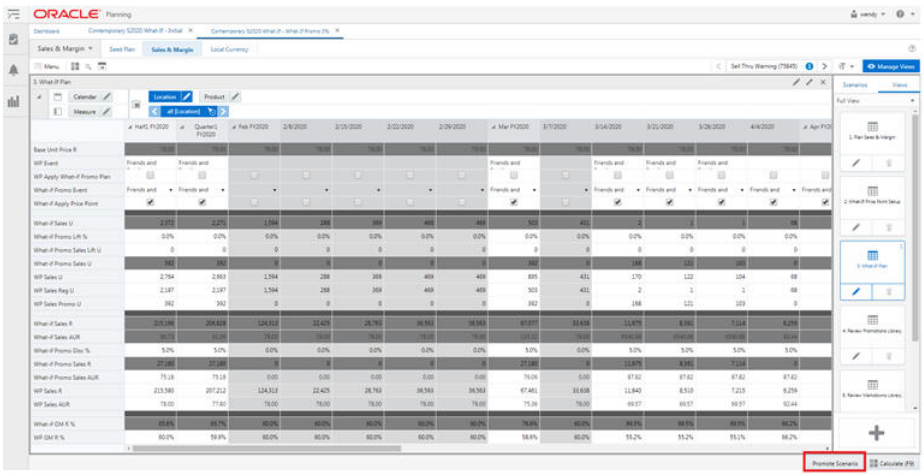
A maximum of three scenarios is allowed, including the master scenario. Once you have created three scenarios and the master scenario, the + icon, Duplicate, and the scenario actions are disabled and you cannot create more scenarios.

Figure 13–8 Maximum Scenarios



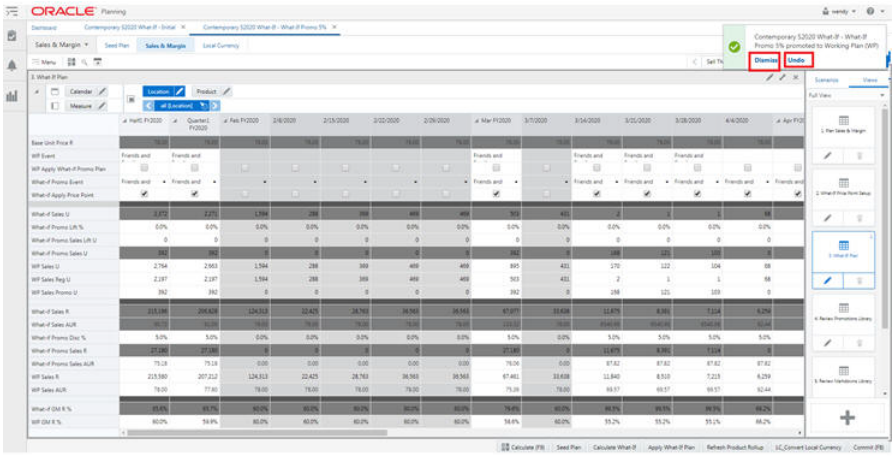
You can delete the scenario in order to create a new scenario. You can promote the scenario to master scenario. In Figure 13–9, the what-if promo 5% scenario is promoted to the master scenario by clicking **Promote Scenario**.

Figure 13–9 Promote Scenario



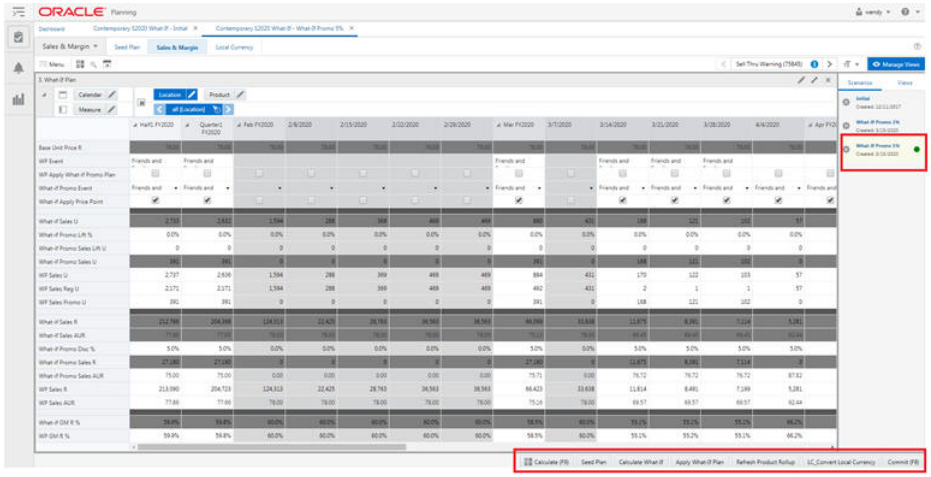
After you click Promote Scenario, a snackbar notification is displayed, as shown Figure 13–10. Here you can either dismiss the notification or undo the promote scenario. If you dismiss the notification, the what-If Promo 5% scenario is promoted to the master scenario. If you click Undo, the what-If Promo 5% scenario is not promoted to the master scenario, and the earlier master scenario continues as master.

Figure 13–10 Snackbar Notification During Promote Scenario



The what-If Promo 5% scenario is now the master scenario and you can commit the data by.

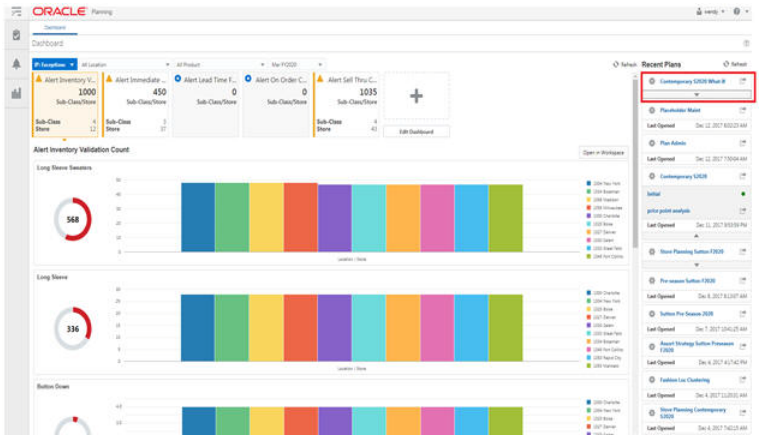
Figure 13–11 Promote Scenario



Viewing All Scenarios from the Dashboard

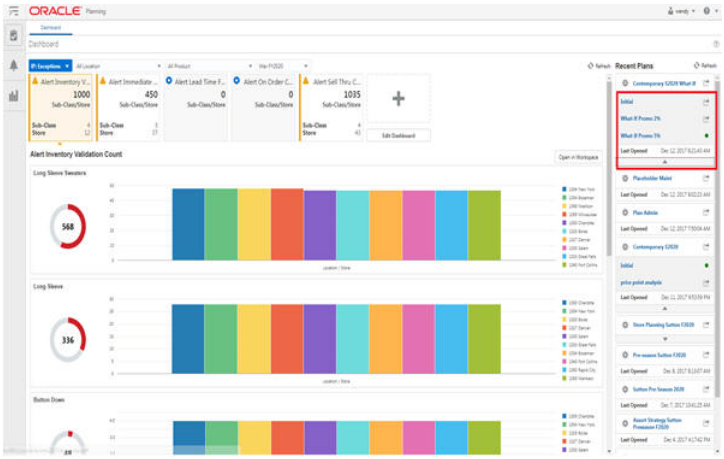
You can view all the scenarios from the recent plans section of the dashboard.

Figure 13–12 View Scenarios via the Dashboard



Click the down arrow under the workspace to see all the available scenarios for the workspace. The green icon indicates the master scenario. You can view the last opened date and time for the workspace.

Figure 13–13 View All Scenarios



You can either launch the workspace scenarios in the same browser or in a new browser tab for quick comparison.

Images

The ability to view images associated with positions on a dimension is useful in many aspects of the retail world such as assortment planning, item planning, and story boarding.

For example, you can associate an item with an image being 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 associate multiple types of images with multiple levels of the Product dimension. For example, you can associate images for product levels such as Department, Class, Subclass, Style and Style/Color.

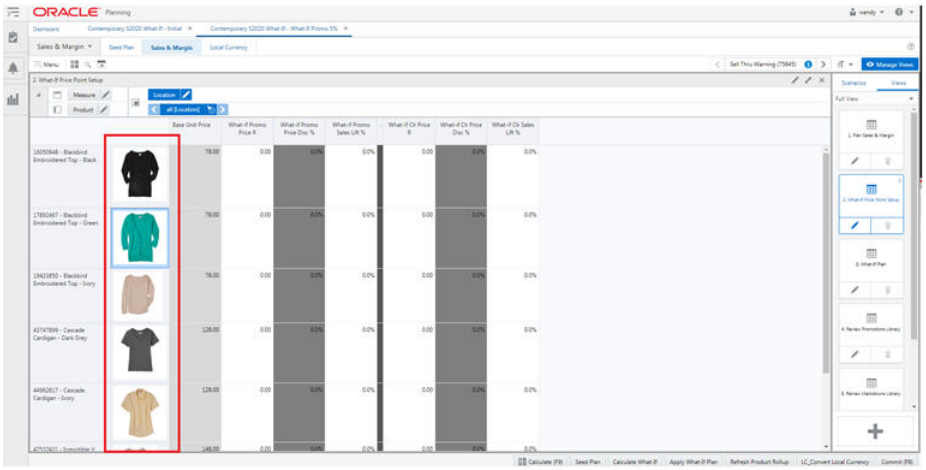
With RPASCE, you can associate an image for any dimension with a configured media attribute, including calendar levels. These images can be stored on a website that must be declared under the safe hosts for the application to display the images.

Overview

Images can be included in a domain by configuring media dimension attributes, loading them with media bundle values referring to images, and making them visible in worksheets. A number of images may be included in each bundle value; one of those is designated as the primary image that can be seen in the pivot table. All the images, not just the primary, can be seen via View/Manage Images.

Pivot table headers display images for visible media dimension attributes. You can see the primary image of the image attribute available for the given level.

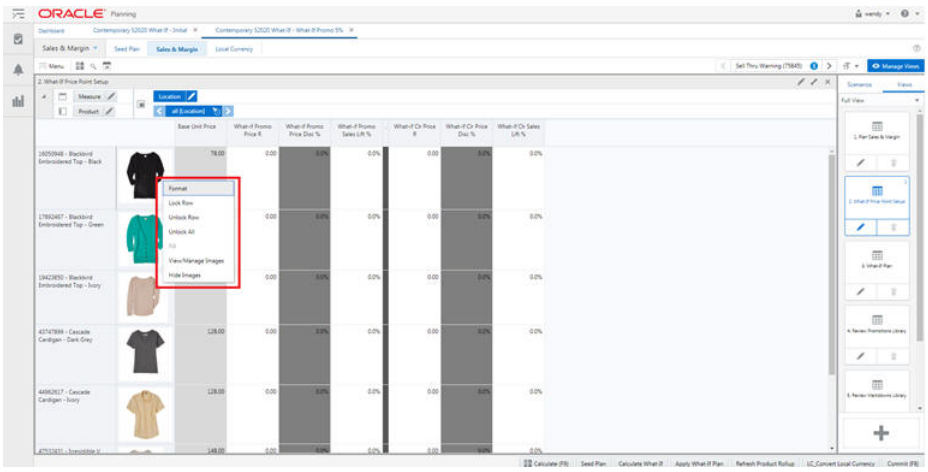
Figure 13–14 Image Display



You can right click on the Images and perform the following actions:

- **Format:** Launches the Format dialog box
- **Lock Row:** Locks the whole row where the image exists
- **Unlock Row:** Unlocks the whole row where the image exists
- **Unlock All:** Unlocks all the rows wherever locked earlier
- **View/Manage Images:** Launches the View/Manage Images dialog box
- **Hide Images:** Hides the images.

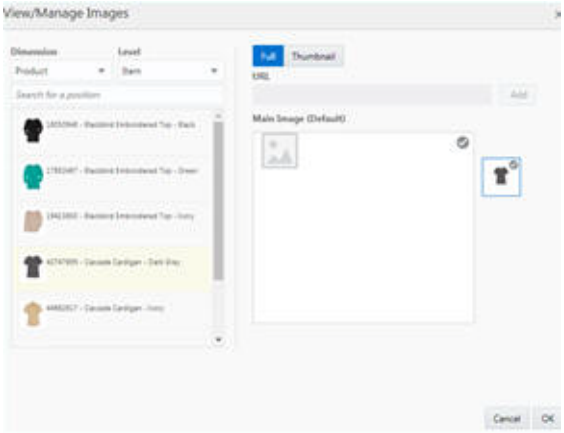
Figure 13–15 Image Cell Action



View and Manage Images

Right click on the Images to launch the View/Manage Images dialog box. You can view the dimension and level of the image displayed. You can search for a particular position by using the search box or scroll bar. You can view the image as full or thumbnail and the main image (default) along with any other existing images for that level.

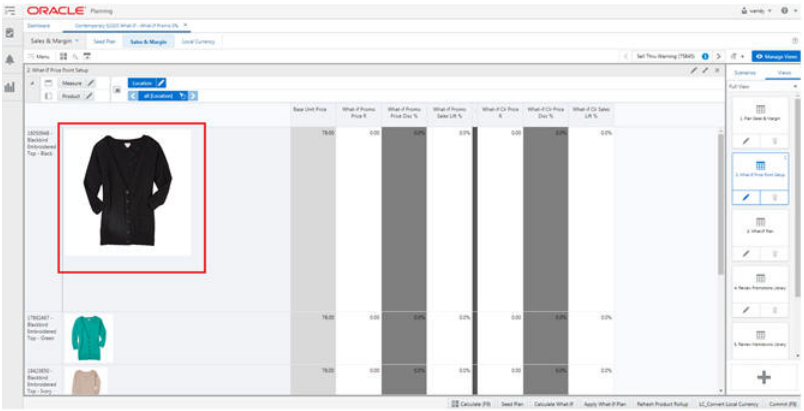
Figure 13–16 View and Manage Images



Resize Images

You can resize the image rows and columns in pivot table and see them persisted so that you do not have to resize them. Images should auto-scale to fit the header cell, but never increase beyond their native size.

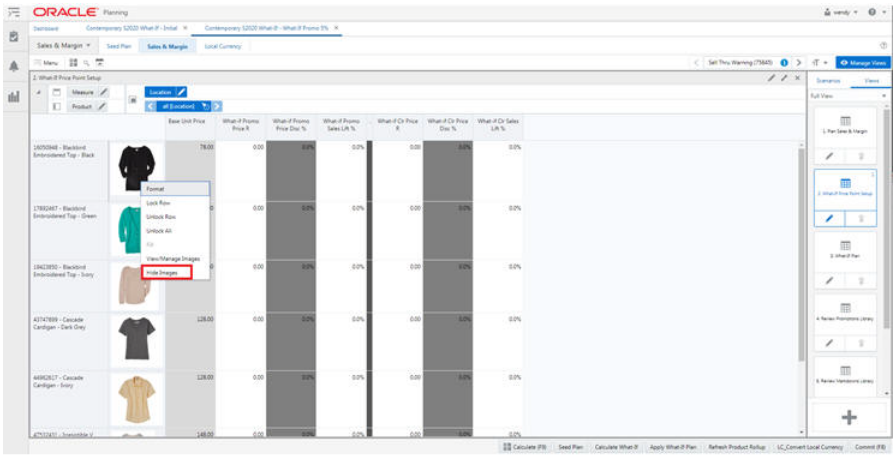
Figure 13–17 Resize Image



Show or Hide Images

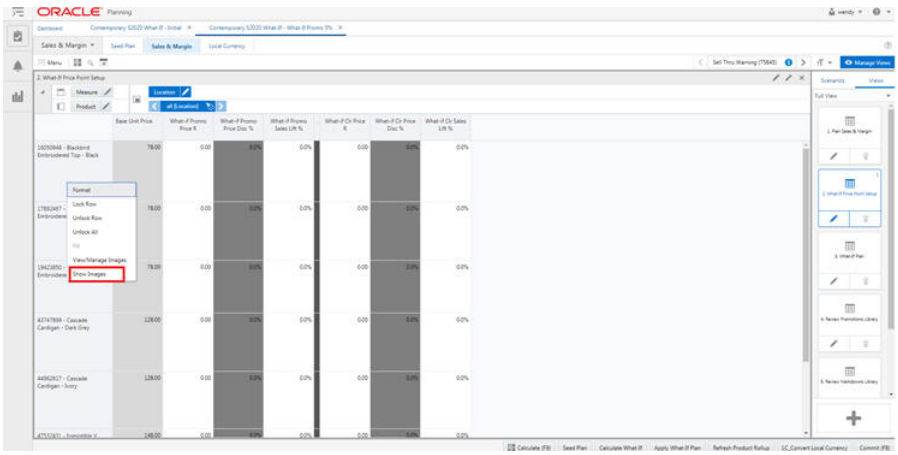
Right click on the Images and click **Hide Images** to hide the images.

Figure 13–18 Hide Images



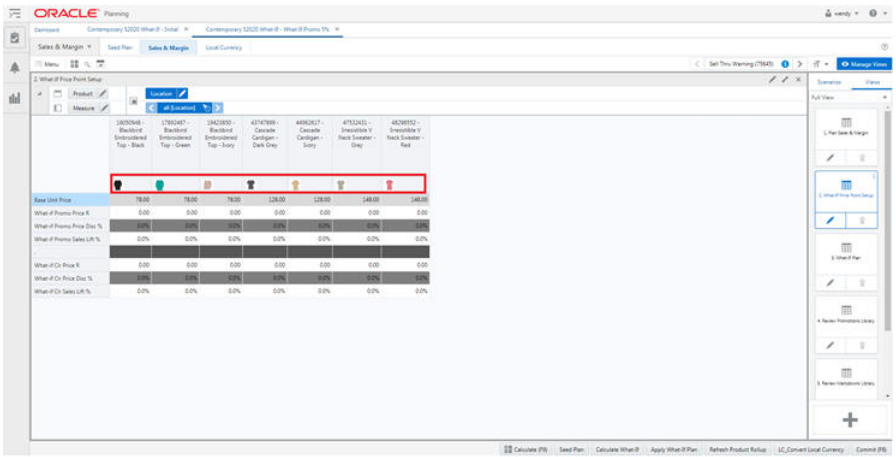
In order to view images, you can click on the dimension position where images are enabled and click **Show Images**.

Figure 13–19 Show Images



You can change the axis of the dimension and the images are rearranged

Figure 13–20 Image Display with Axis Pivot



The default No Image icon is displayed when no image is associated with the dimension position. If an image URL is associated but RPASCE cannot show the image, then the Broken Image is displayed.

Figure 13–21 No Image Icon

Figure 13–22 Broken Image Icon

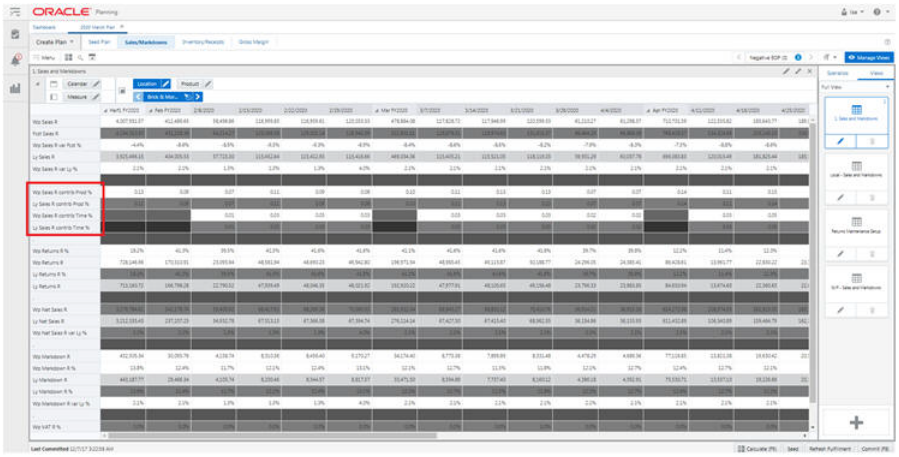
Extended Measures

You can use an extended measure 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 are defined in the pre-configured RPASCE in a view using the configuration.

This functionality is commonly used to define measures that are percentage participations of sales measures. Typically, these measures are defined as:

- **Absolute Percent of Parent:** 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 Percent of Parent:** A percentage to the next level shown in any dimension (such as Product).
- **Ranking:** A value that indicates the relative order of positions in either ascending or descending order.
- **Cumulative Sum:** A sequence of partial sums of a given sequence, based on an ascending or descending rank.
- **Cumulative Percent:** A sequence of partial sums of a given sequence, based on an ascending or descending rank expressed as a percentage to the total.

Figure 13–23 Extended Measure



Note the following:

- Extended measures can be defined only on measures that have Total as their default aggregate method.
- When the percentage of the extended measure is changed, values of the underlying measure change to reflect the newly set percentage.
- Multiple extended measures can be defined for the same underlying measure; however, only one extended measure or the underlying measure can be edited before calculation. All other versions are protected.
- Smart editing is not allowed in the extended measure.
- Extended measures cannot be based on split dimensions.
- The value of an extended measure is a fraction between zero and one. If desired, you must format the measure to be displayed as a percentage.
- For extended measures contributions in instances with very small values (such as 0.000001) in the cell, those values are considered to be 0.0 when the extended measures contribution is determined.
- For Ranking, Cumulative Sum, and Cumulative Percent, the extended measures are read only.