

**Oracle® Retail Predictive Application Server Cloud
Edition**

User Guide

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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 Administration Guide*
- *Oracle Retail Predictive Application Server Cloud Edition Configuration Tools User Guide*
- *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. |
| <i>italic</i> | Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values. |
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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 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.

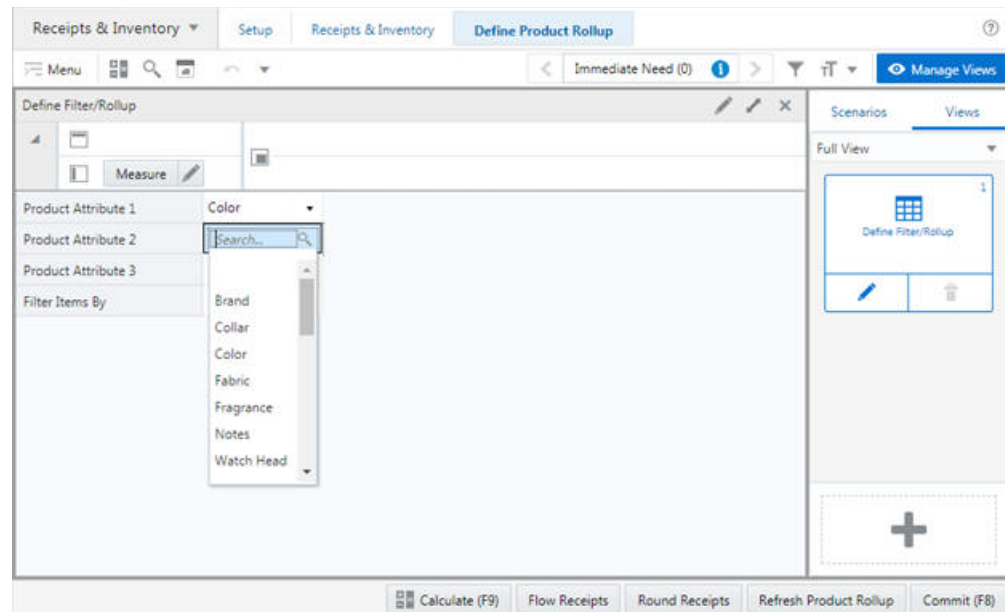
Dashboard

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.

Figure 1–1 Dynamic Hierarchy



Setting Up Your Browser

The RPASCE Client can be accessed using 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

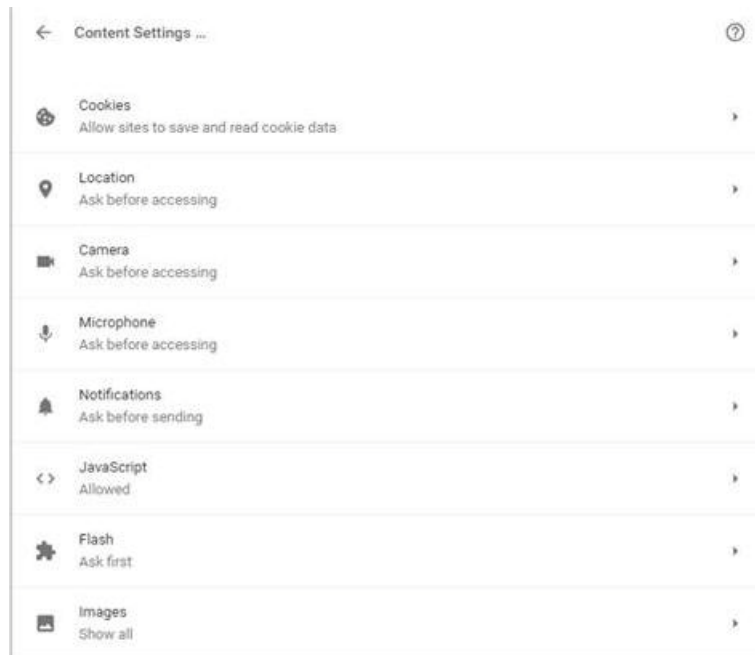
Cache Settings

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

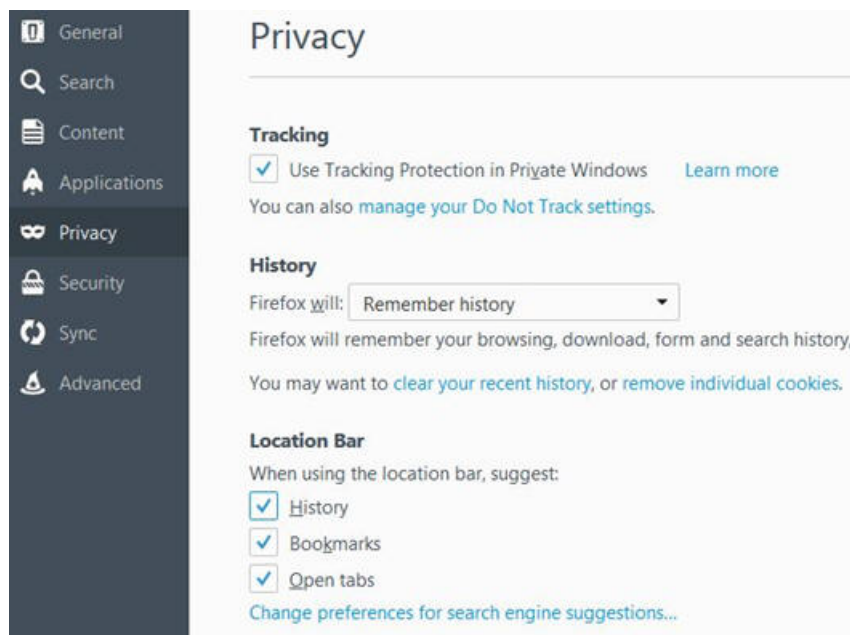
Ensure that JavaScript and Cookies are enabled on your browser. These may be the default settings in most cases; if not, ensure that this is the case using the following steps.

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

Figure 1–2 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 1–3 Firefox Privacy Panel

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

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.

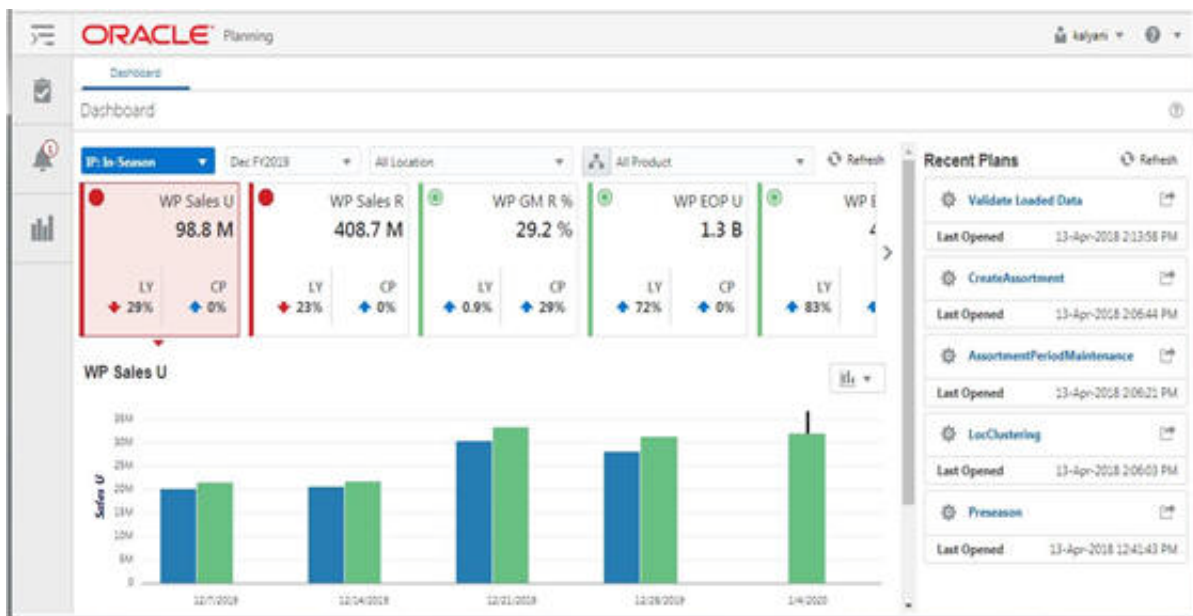
What you see when logging in depends on the type of external authentication used. The RPASCE login page appears only when you use Oracle Access Manager (OAM) for authentication.

To log into the RPASCE:

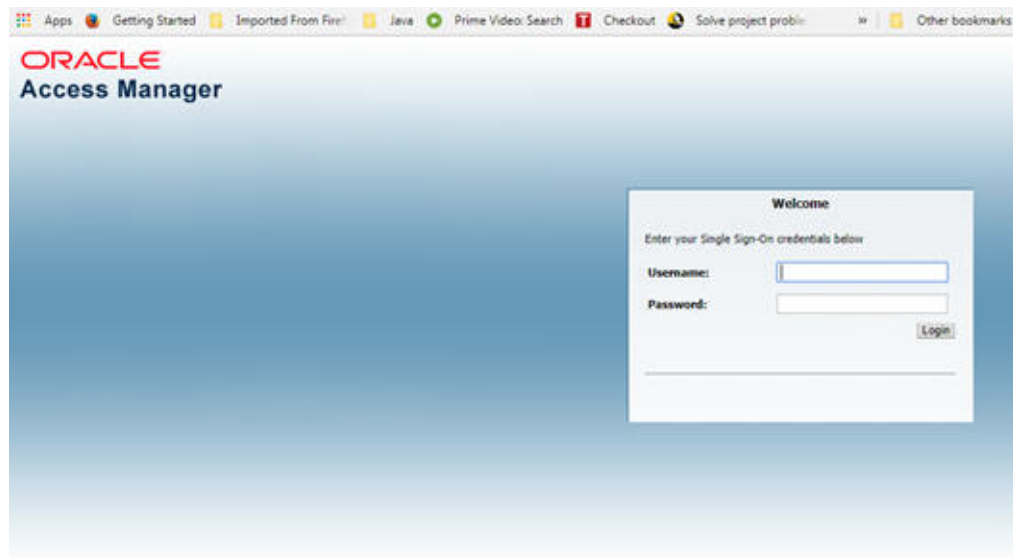
1. Open a supported internet browser.
2. In the Address bar, enter the RPASCE URL and click **Enter**.
3. Enter the Username and Password details and click **Log In**.
4. If the notification server login is required, enter the notifications username and password after logging into the application. Enter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

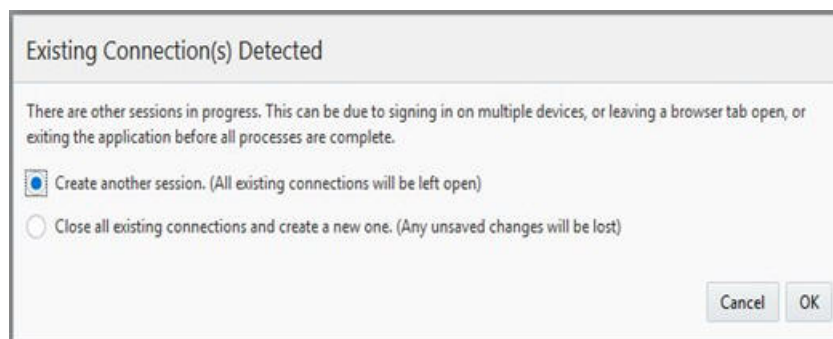
Logging In Using Single Sign-On

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 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 Creating Concurrent Session

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 Administration Guide*.

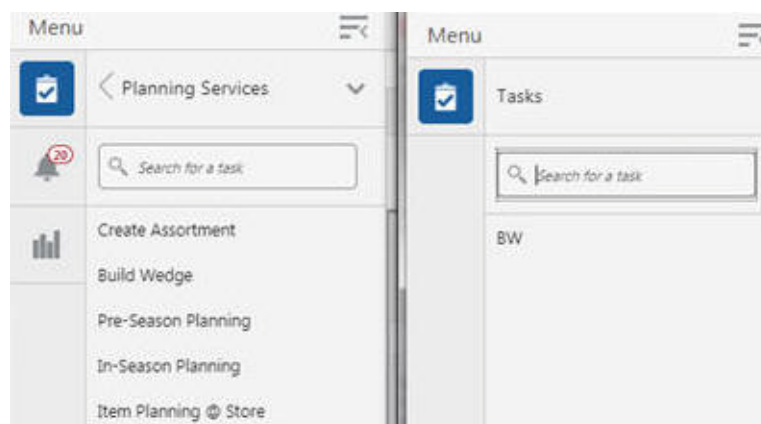
Comparative Analysis

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.

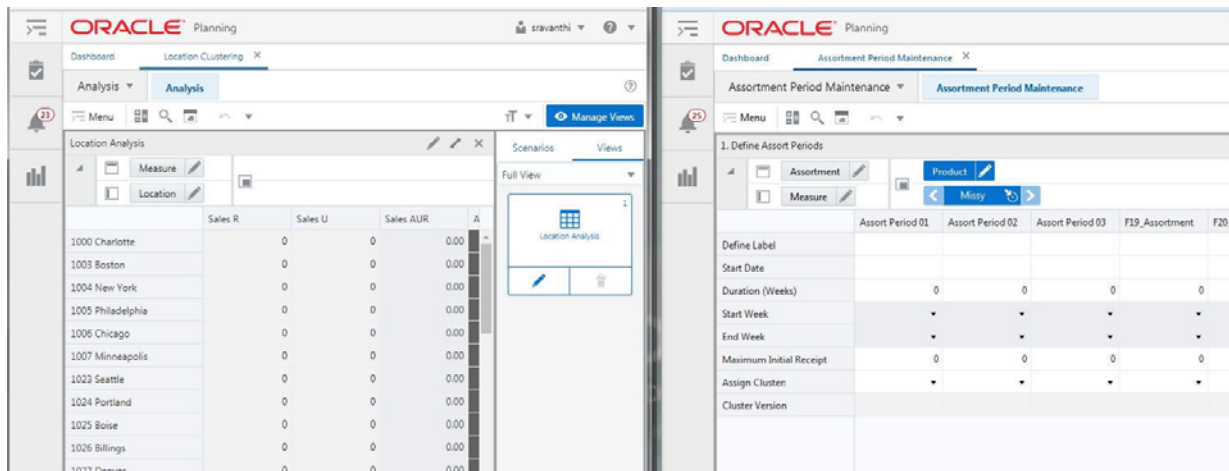
You can launch the view in a separate browser tab in order to do comparative analysis. When you want to do such an analysis, you can go to the recent plans pane and click the launch icon next to the segment name. The secondary tab will not have all the menu options that the primary window has.

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

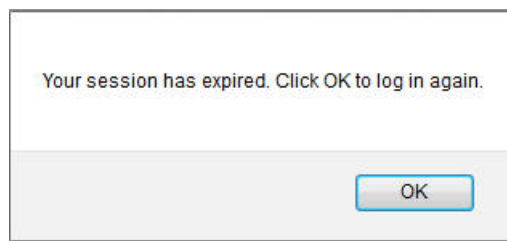


You can compare the views in the concurrent login sessions. This view is almost similar to the earlier one, except that in the second login you have access to all the features of RPASCE. You are not limited to comparing the one workspace that you opened; you can switch between workspaces, bring up other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

Figure 1–8 Compare Views in Concurrent Login Sessions

Session Expiration

A user's login session can end abruptly when certain actions in the system occur. These actions can occur as a result of user behavior or system-executed periodic tasks.

Figure 1–9 Login Session Expiration

User-Driven Actions

Here is an example of a user-driven use case. A user has logged into a session and has opened multiple workbooks. If the user logs concurrently into an alternate device or a private browser, the user will be presented with an option to either start a new session or close the previous session. If the user chooses to close the previous session, the user will receive a session expiration message for the first logged in device or browser when the user takes an action during the session.

System-Driven Actions

Three different system-driven actions can cause the expiration of a session.

- A user has logged into a session on a device and has not used the session for 35 minutes. The session then automatically logs the user out. In the case, contact the cloud system administrators in order to increase the timeout.
- When an offline mode online administration task is triggered for execution, it first shuts down all non-administration users from the system. This may trigger a session expiration from the system as well. See *Oracle® Retail Predictive Application Server Cloud Edition Administration Guide* for a list of the offline online administration tasks that can trigger this behavior.
- During a workspace session that is the session within the login session to expire, users can occasionally see the message "The workbook or wizard process timed

out. Please close the workbook tab or wizard dialing and re-open it." In this situation, the user's login session has not expired; the user can reopen the workspace and continue to work.

This can happen for the following reasons:

- When the user opens multiple workspace within the same login session and continues to work in one of the workspaces, while leaving the others idle, the idle workspace session may throw an error. The user will see the message "The workbook or wizard process timed out. Please close the workbook tab or wizard dialing and re-open it."

The period of time it takes for the timeout is determined by the environment variable `RPAS_REQUEST_TIMEOUT`. This variable is either set to eight hours by the application or by an administrator in the backend. This variable assumes that a user can work on a workspace for eight hours continuously.

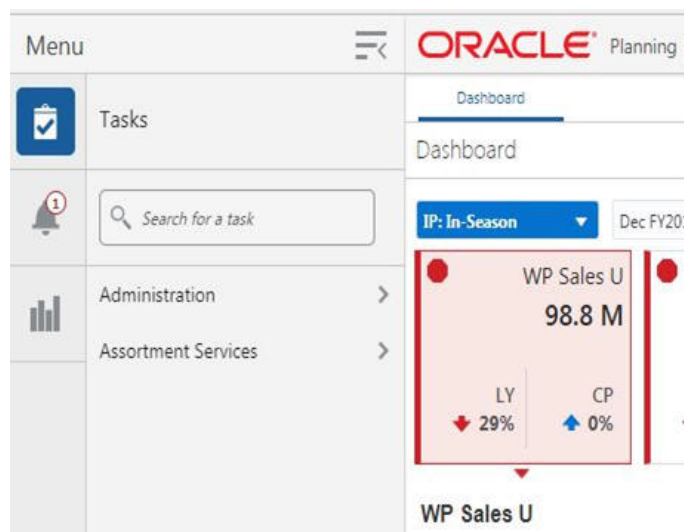
- If there are issues in the workspace itself regarding the performance or operation on the workbook, the user will see the message. Contact the application administrator in this situation.

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.

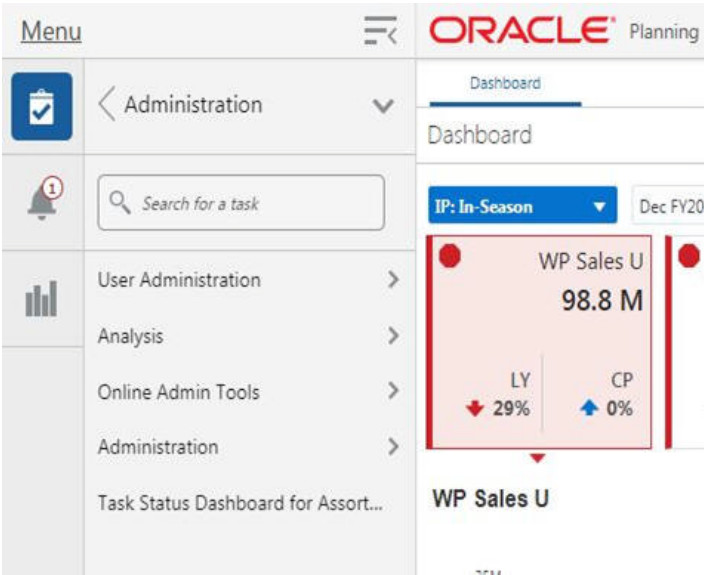
Figure 1–10 Taskflow



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

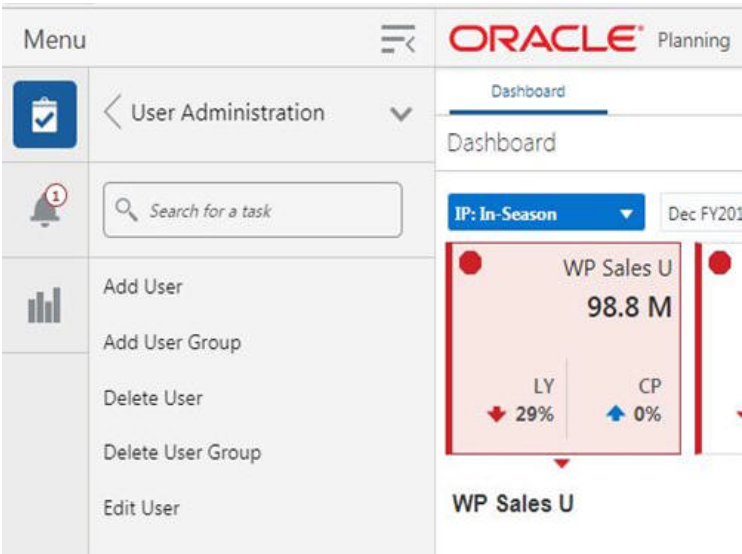
Click on specific task to view the steps associated under the task.

Figure 1–11 Administration Tasks



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

Figure 1–12 User Administration Task Substep



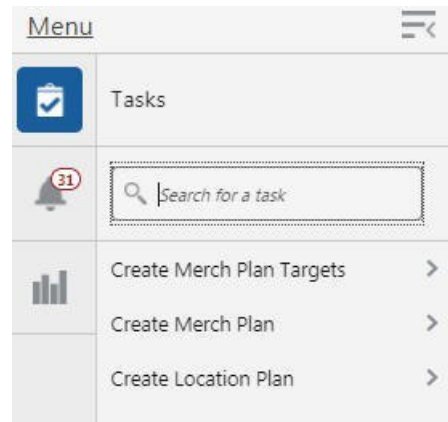
Access-Based Visibility

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 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 1–13 Task Administrator 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.

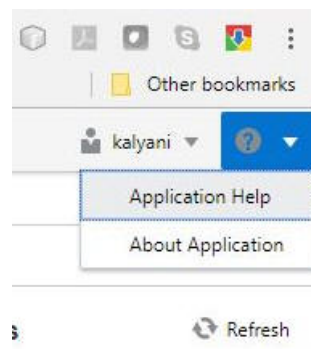
Workspace Operations

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 1–14 Accessing About Application



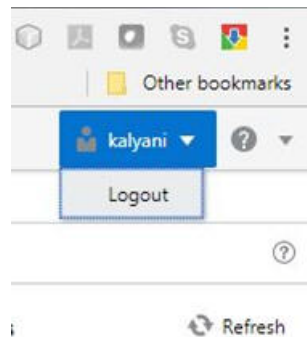
Accessing Online Help

Click the Question Mark in the top right, as shown in [Figure 1–14](#). Select Application Help to access the online help.

Logging Out of the Application

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

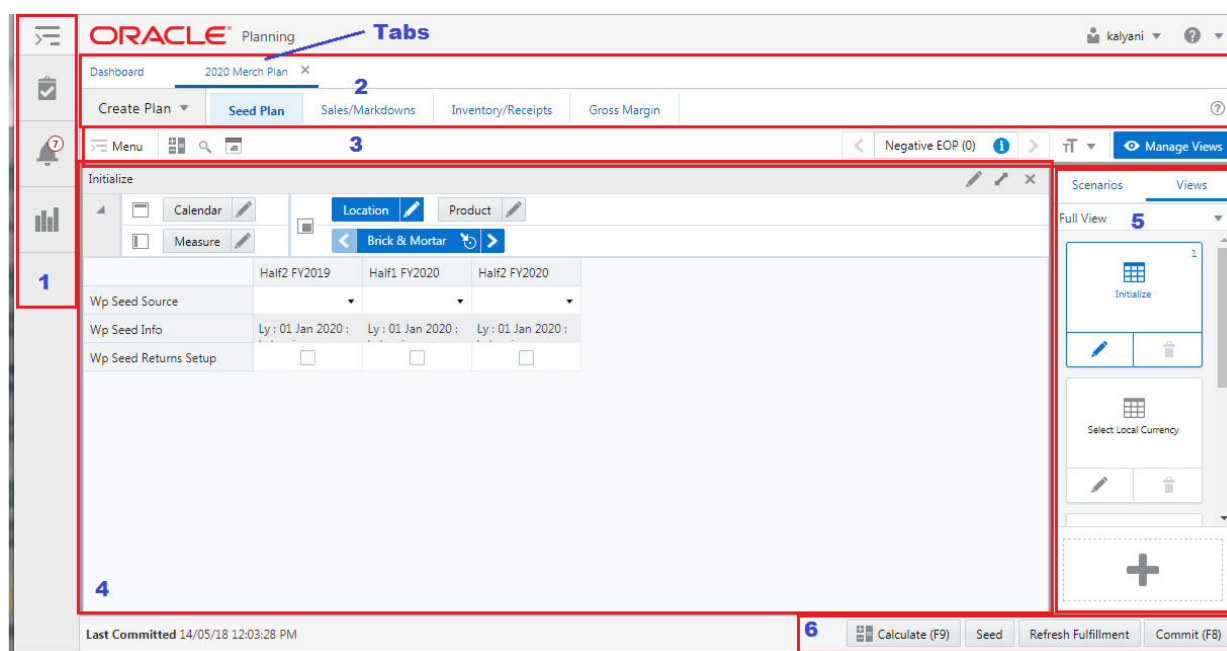
Figure 1–15 Logout



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:

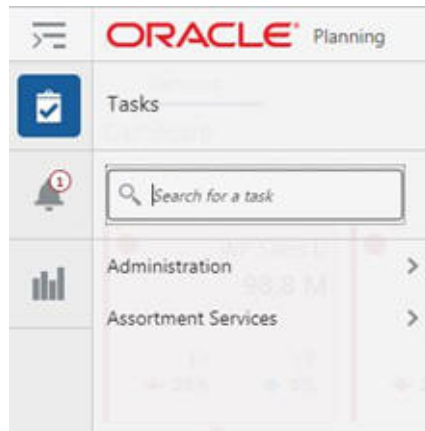
- Task Module

- 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.

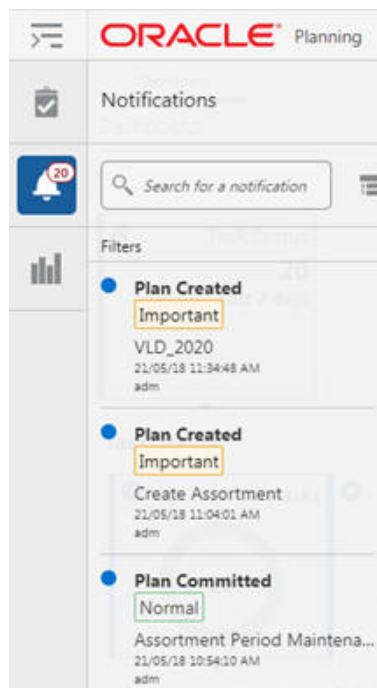
Figure 2–2 Task Module for Access to Segments Dialog Box



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.

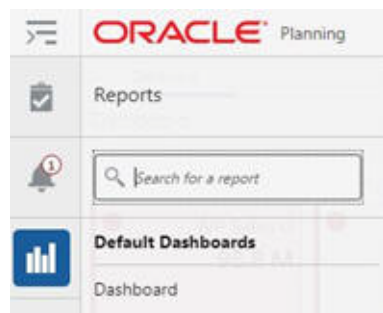
Figure 2–3 Using Notifications



Reports

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

Figure 2–4 Reports Module



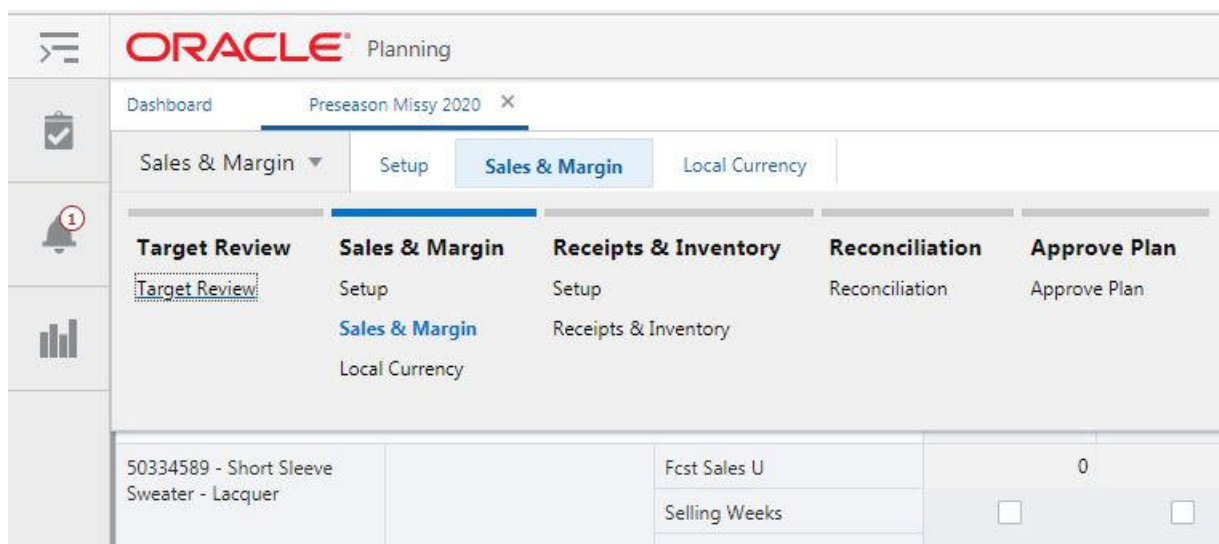
Mega Menu

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

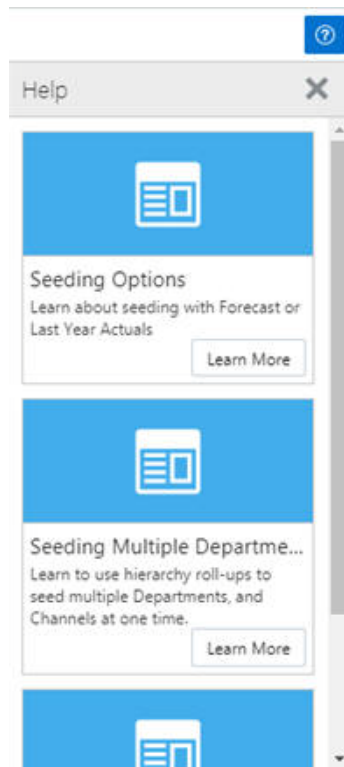


Help

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

The planner can use Help to access relevant resources within the application that provide information about the particular context of the system feature that user is accessing. The help resources supported are documents and short videos.

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

The screenshot displays the Oracle Planning application interface. At the top, the 'ORACLE Planning' header is visible, along with a user profile 'kalyani' and a help icon. Below the header, there are tabs for 'Dashboard' and 'Create Assortment'. The main area is titled 'Review History/Plan' and features a 'Menu' button, a search icon, and a 'Manage Views' button. A red box highlights the 'Quick Access Toolbar' area, which includes a 'Menu' button, a search icon, and a 'Manage Views' button. The main content area shows a table with columns for 'Adj LY Sales R', 'Adj LY Sales U', 'Adj LY Sales AUR', 'Adj LY Sales U', and 'Adj LY Sales R'. The table lists various products, including 'Missy Cardigan Sweaters', '54291800 - Contrast Elbow Patch Cardigan -', '63214451 - Waffle Knit', '65945004 - Waffle Knit', '70063172 - Merino Wool', '72939751 - Merino Wool', '73137693 - Merino Wool', '77316938 - Angled Front', and '78498351 - Angled Front'. The right sidebar contains a 'Full View' dropdown and a list of views: '1. Review History', '2. Review History by Attributes', and '3. Review MFP Targets'. A large plus sign is at the bottom of the sidebar.

| | Adj LY Sales R | Adj LY Sales U | Adj LY Sales AUR | Adj LY Sales U | Adj LY Sales R |
|--|----------------|----------------|------------------|----------------|----------------|
| Missy Cardigan Sweaters | 123,781 | 508 | 243.57 | | |
| 54291800 - Contrast Elbow Patch Cardigan - | 29,314 | 148 | 198.00 | | |
| 63214451 - Waffle Knit | 13,933 | 90 | 155.00 | | |
| 65945004 - Waffle Knit | 0 | 0 | 0.00 | | |
| 70063172 - Merino Wool | 0 | 0 | 0.00 | | |
| 72939751 - Merino Wool | 0 | 0 | 0.00 | | |
| 73137693 - Merino Wool | 0 | 0 | 0.00 | | |
| 77316938 - Angled Front | 36,416 | 122 | 298.00 | | |
| 78498351 - Angled Front | 44,119 | 148 | 298.00 | | |

Menu

Menu contains the following menu options:

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

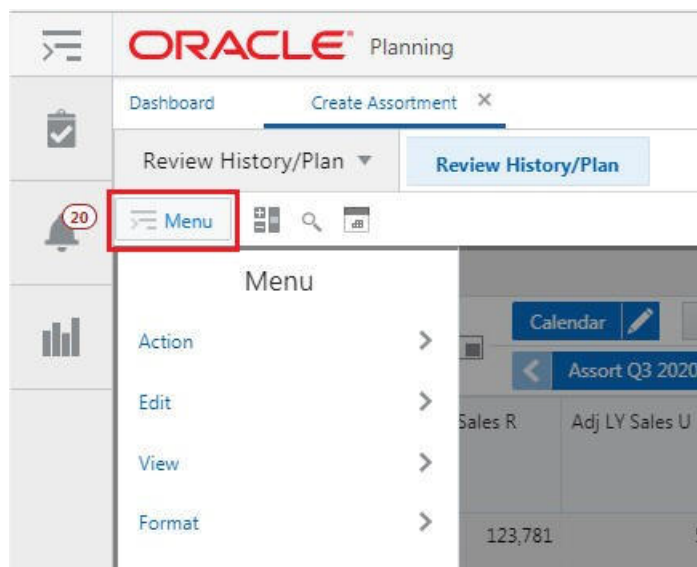
Figure 2–8 Quick Access Toolbar Menu Options

Table 2–1 lists the options within each menu.

Table 2–1 Toolbar Menu Options

| Menu | Submenu | Sub-Submenu |
|--------|----------------------------|---------------------------------|
| Action | Commit | - |
| | Refresh | - |
| | Add Positions | - |
| | Modify Positions | - |
| 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

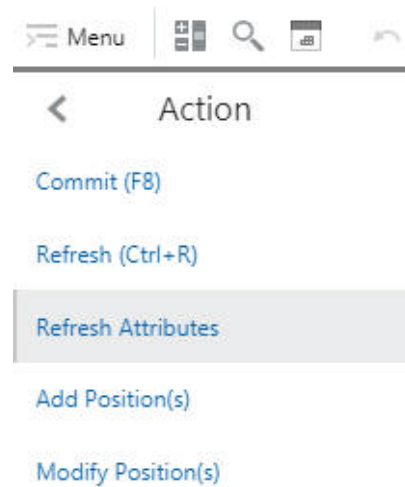
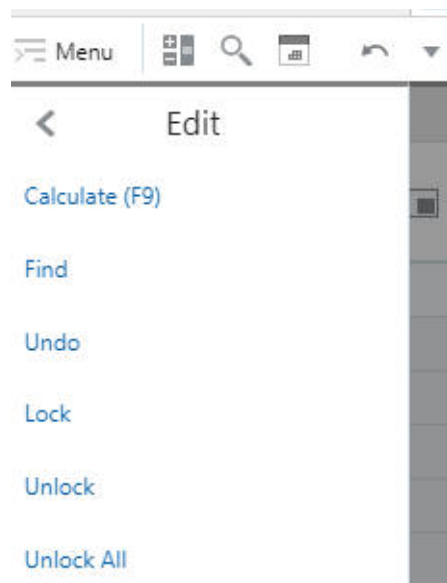


Table 2–2 Action Menu Options

| 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 |
| Refresh Attributes | Use to update the attribute values displayed in the pivot table. Manually trigger this action to get the latest attribute values in order to plan more accurately. This action is separate from the Refresh action. |
| Add Positions | Use to add new placeholder positions using the Dynamic Position Maintenance functionality |
| Modify Positions | Use to modify/delete the already created placeholder positions using the Dynamic Position Maintenance functionality |

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. |
| Undo | Use to undo the last action performed within the workspace (not just the current 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

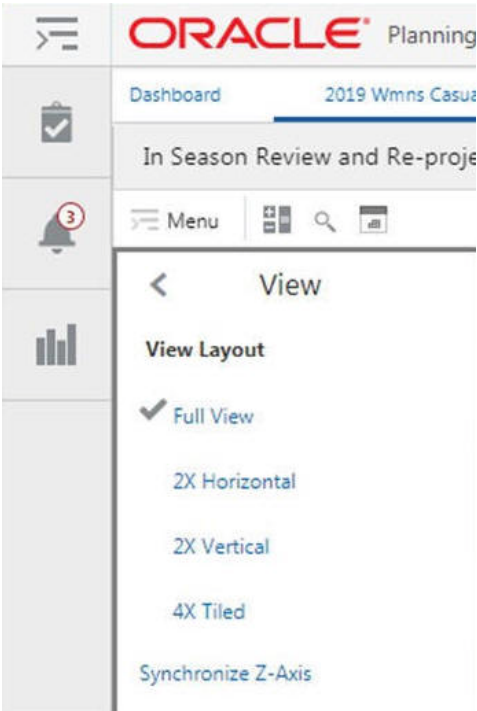


Table 2–4 View Menu Options

| 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*

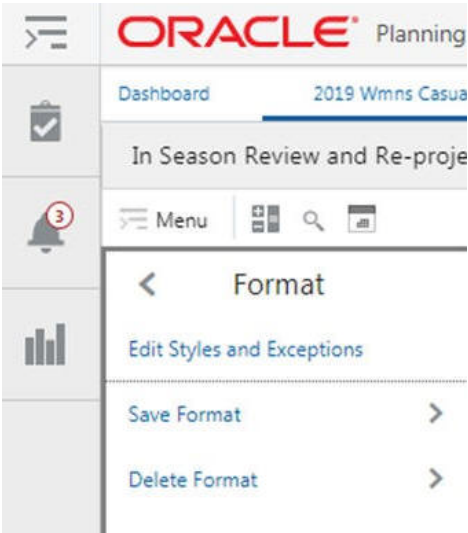
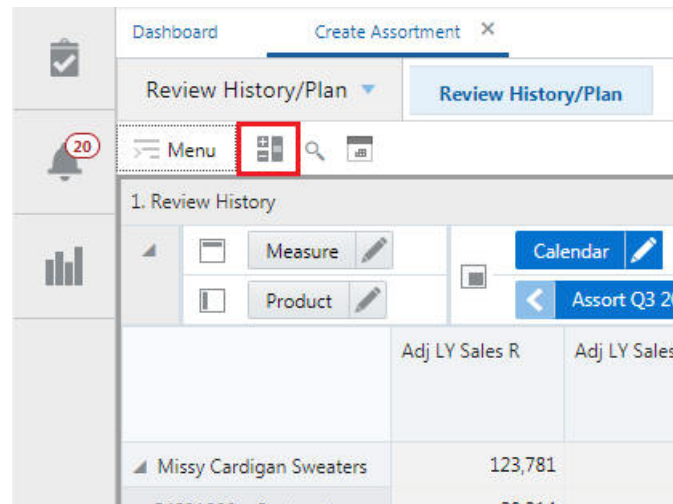


Table 2–5 *Format Menu Options*

| 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 |
| Restore Format | Used to restore the format from the workspace template or from a group, so that you can be aligned with your team. |

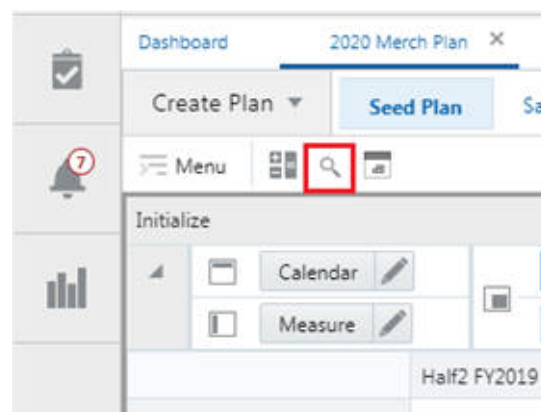
Calculate Button

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

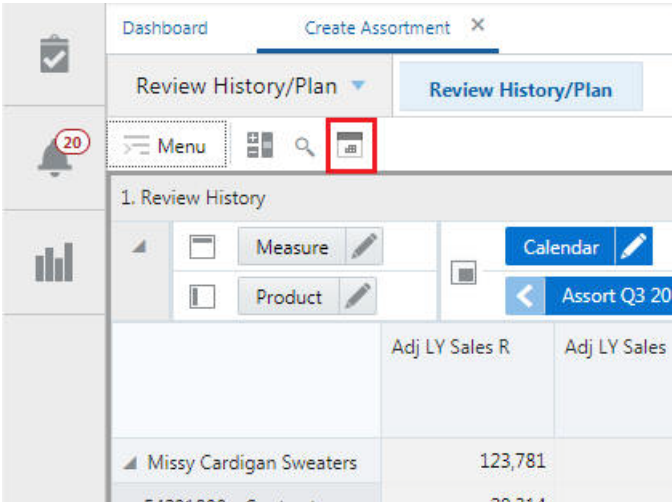
You can use the **Find** button to find any specific string with either As-Is or Match case or Whole word. You can also choose to search the string in all views or selected views of the workspace or all dimensions or specific dimensions available in the workspace.

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.

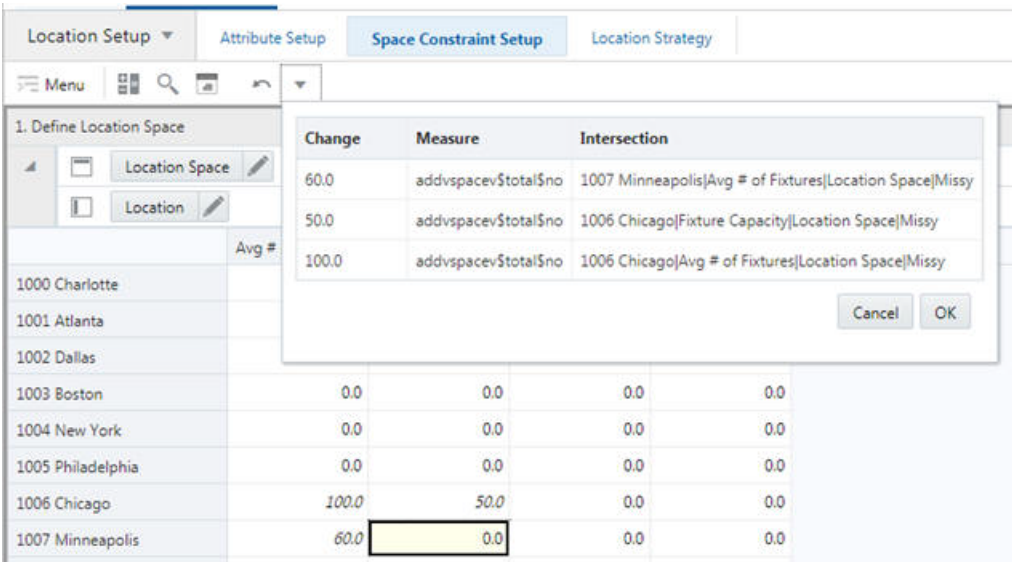
Figure 2–15 Export Button



Undo Button

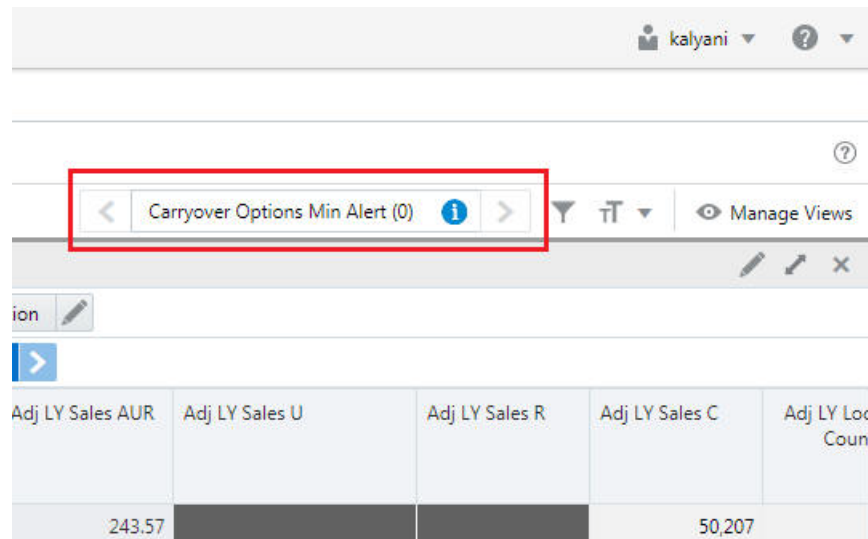
You can use the Undo functionality to undo the list of actions performed within the workspace until the last calc operation. All the actions performed are displayed in descending order, and you can choose to undo the latest action or the series of actions one step at a time or all the actions performed (until the last calc operation) by choosing the first action (the last one in the list).

Figure 2–16 Undo Button



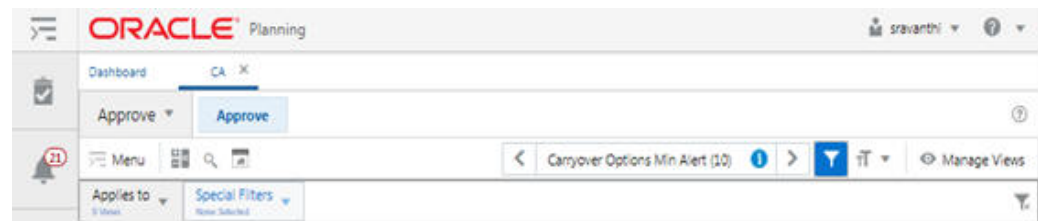
Real Time Alerts Exceptions List

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 2–17 Real Time Alerts Exception List

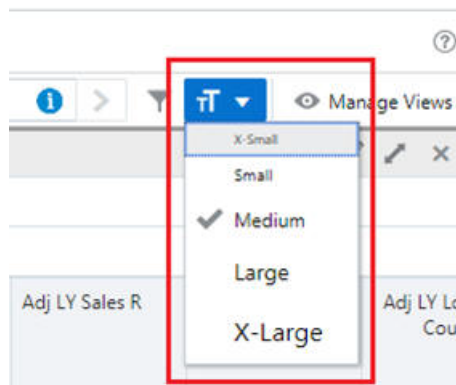
Special Filters

You can use the Special Filter Icon to view/hide the special filters. You can also choose to enable/apply the special filters to perform the position query in a view or selected views of the workspace.

Figure 2–18 Special Filters

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 2–19 Text Size Options

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.

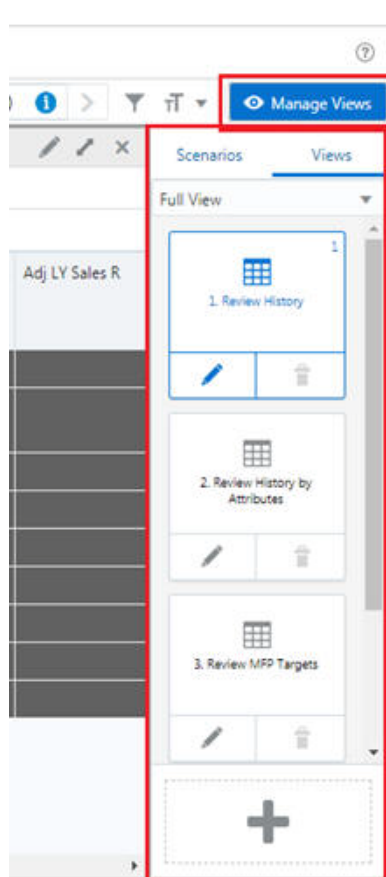
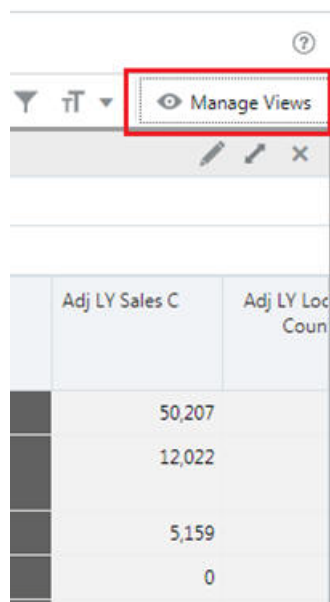
Figure 2–20 View Management Drawer: Show

Figure 2–21 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 2–22 shows the various components in the content area.

Figure 2–22 Content Area Components

The image shows a screenshot of the 'Review History' window. The window has a title bar with a close button. Below the title bar is a toolbar with buttons for 'Measure', 'Calendar', 'Location', and 'Product'. The 'Calendar' button is highlighted with a blue background and contains the text 'Assort Q3 2020'. Below the toolbar is a table with columns for 'Adj LY Sales R', 'Adj LY Sales U', 'Adj LY Sales AUR', 'Adj LY Sales U', 'Adj LY Sales R', 'Adj LY Sales C', and 'Adj LY Loc Coun'. The table contains data for various products, including 'Missy Cardigan Sweaters', '54291800 - Contrast Elbow Patch Cardigan - 01-1-10', '63214451 - Waffle Knit', '65945004 - Waffle Knit', '70063172 - Merino Wool', '72939751 - Merino Wool', '73137693 - Merino Wool', '77316938 - Angled Front', and '78498351 - Angled Front'. The table is labeled with red letters A, B, and C. A is in the top right corner, B is in the top right corner of the table area, and C is in the top right corner of the table area.

| | Adj LY Sales R | Adj LY Sales U | Adj LY Sales AUR | Adj LY Sales U | Adj LY Sales R | Adj LY Sales C | Adj LY Loc Coun |
|--|----------------|----------------|------------------|----------------|----------------|----------------|-----------------|
| Missy Cardigan Sweaters | 123,781 | 508 | 243.57 | | | 50,207 | |
| 54291800 - Contrast Elbow Patch Cardigan - 01-1-10 | 29,314 | 148 | 198.00 | | | 12,022 | |
| 63214451 - Waffle Knit | 13,933 | 90 | 155.00 | | | 5,159 | |
| 65945004 - Waffle Knit | 0 | 0 | 0.00 | | | 0 | |
| 70063172 - Merino Wool | 0 | 0 | 0.00 | | | 0 | |
| 72939751 - Merino Wool | 0 | 0 | 0.00 | | | 0 | |
| 73137693 - Merino Wool | 0 | 0 | 0.00 | | | 0 | |
| 77316938 - Angled Front | 36,416 | 122 | 298.00 | | | 14,934 | |
| 78498351 - Angled Front | 44,119 | 148 | 298.00 | | | 18,092 | |

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 2–23 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.

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.

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

| | Adj LY Sales R | Adj LY Sales U | Adj LY Sales AUR | Adj LY Sales AUR |
|--|----------------|----------------|------------------|------------------|
| Missy Cardigan Sweaters | 123,781 | 508 | 243.57 | |
| 54291800 - Contrast Elbow Patch Cardigan - Black | 29,314 | 148 | 198.00 | |
| 63214451 - Waffle Knit Shawl Collar Cardigan - Black | 13,933 | 90 | 155.00 | |
| 65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather | 0 | 0 | 0.00 | |

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

Select Position

- 54291800 - Contrast Elbow Patch Cardigan - Black
- 63214451 - Waffle Knit Shawl Collar Cardigan - Black
- 65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather
- 70063172 - Merino Wool Flutter Cardigan - Black
- 72939751 - Merino Wool Flutter Cardigan - China Red

Cancel OK

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

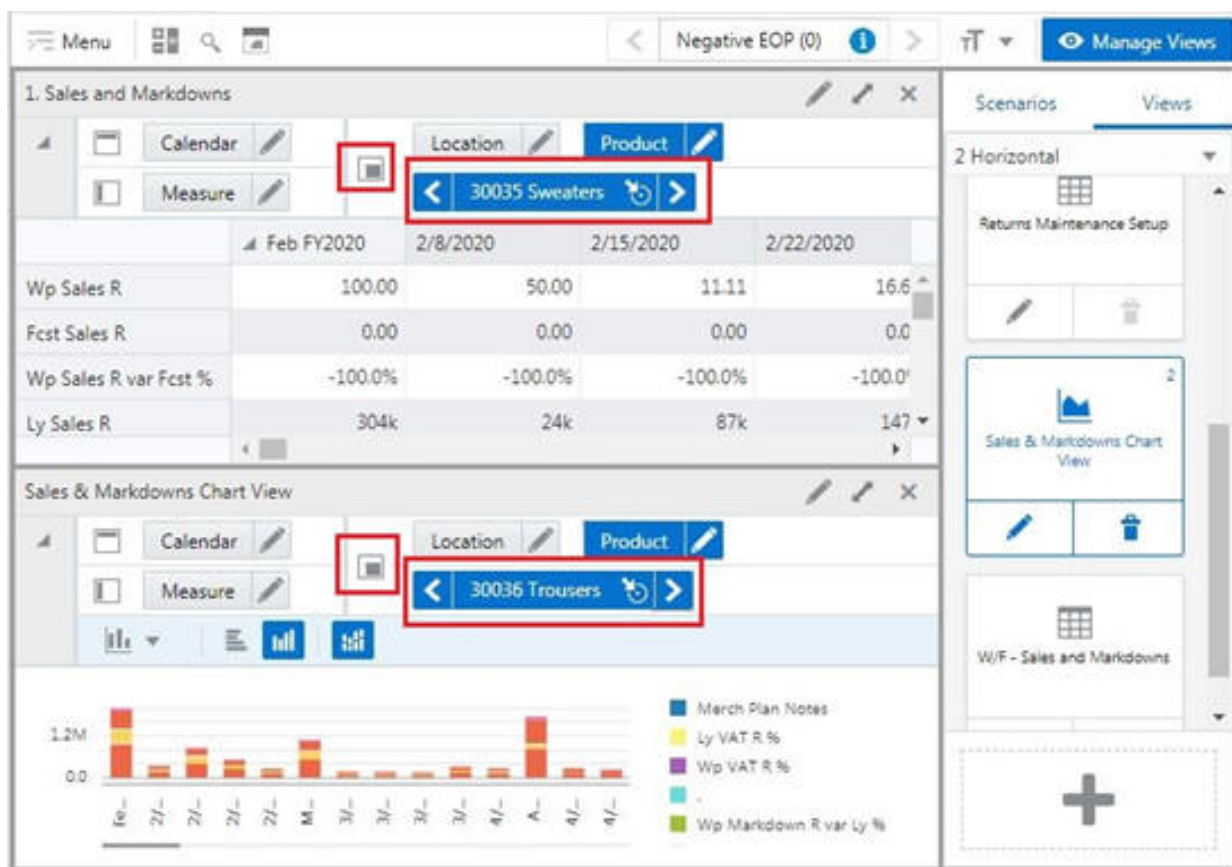
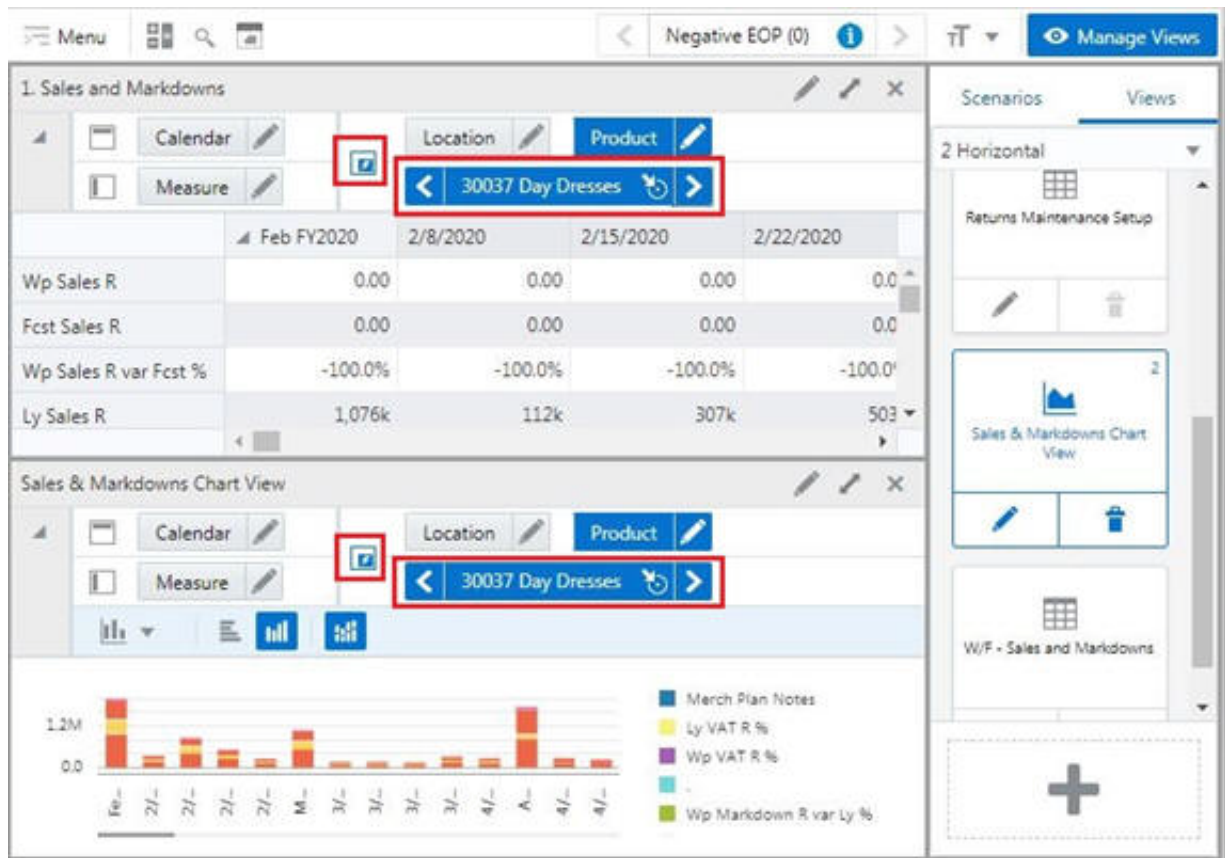
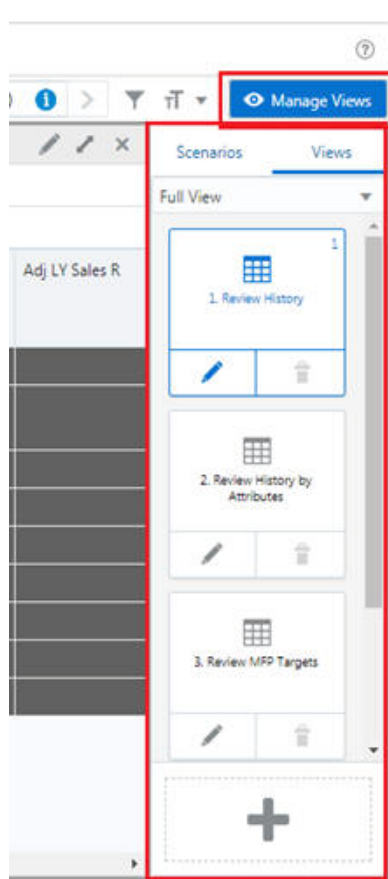


Figure 2-27 Enabling Synchronize Z-Axis



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, 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

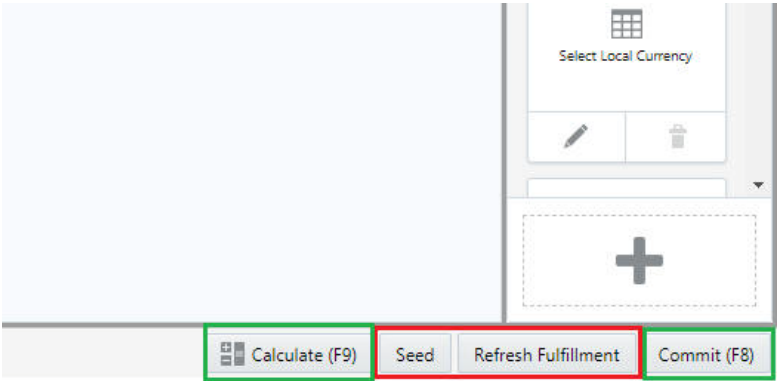
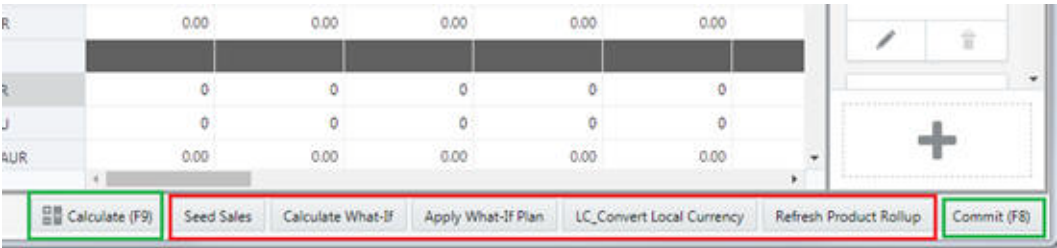


Figure 2–30 Example of Application Actions and System Actions in IP CS



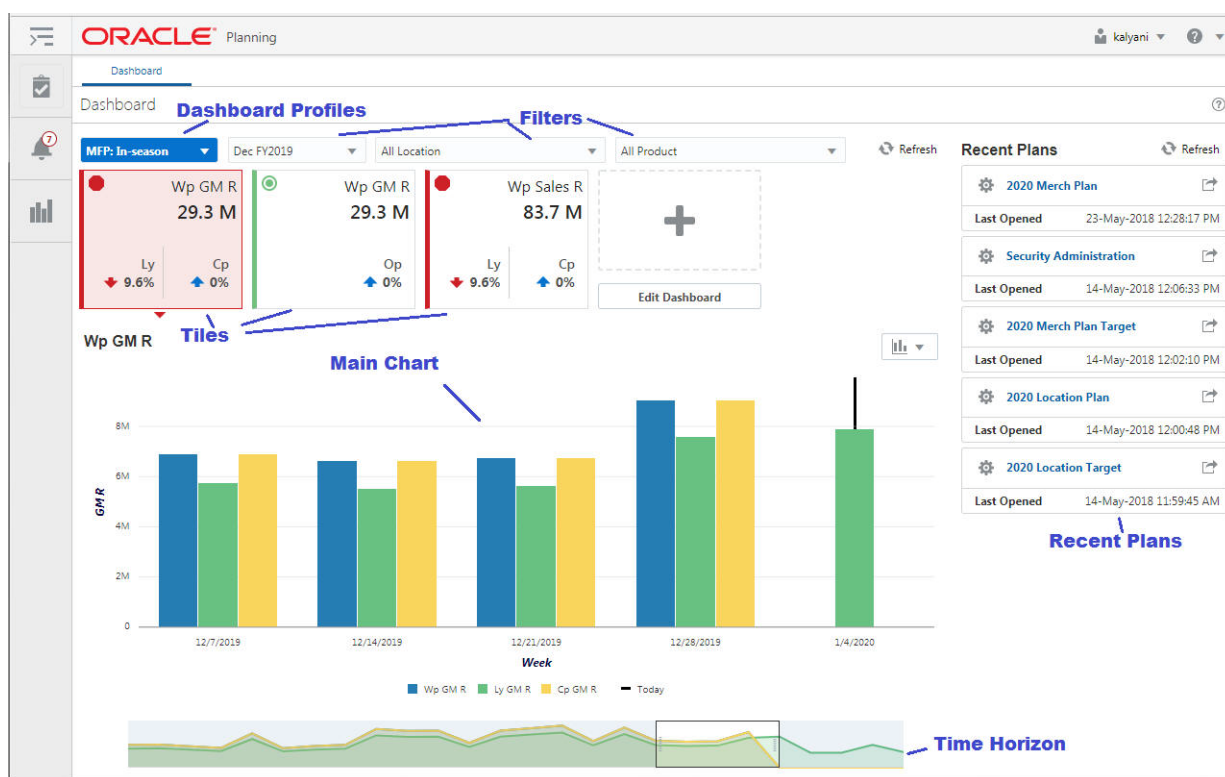
Dashboards

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.

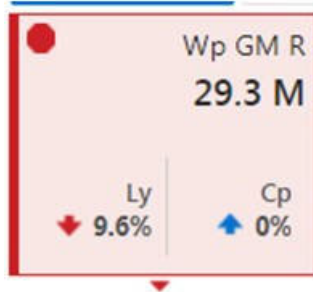
Figure 3–1 Dashboard



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 one or more measures representing the absolute or percent differences between two quantities. 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.

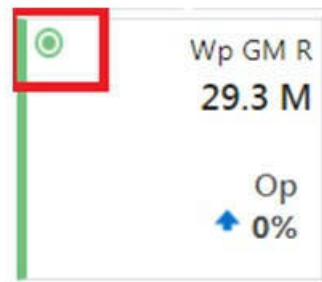
The colors indicate the following states: red = critical, yellow = important, green = normal, blue = no severity, and grey = administration.

Figure 3–3 Tile Showing Color State and Icon



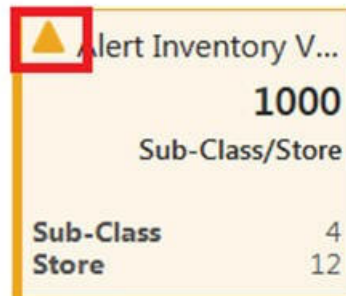
- An informational tile, shown in [Figure 3–4](#), is always green (indicating no problem) because it simply shows the measure.

Figure 3–4 Informational Tile



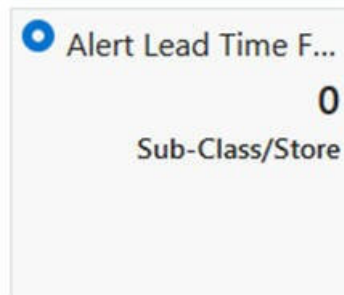
- A yellow triangle tile, shown in [Figure 3–5](#), represents an exception with Important Severity.

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

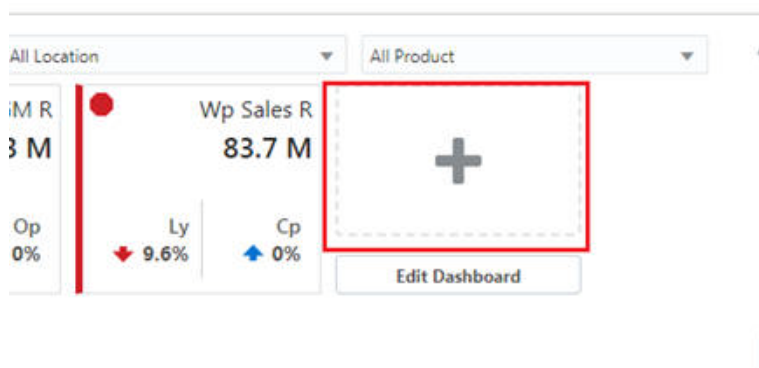


Metric tiles must represent the basic quantities that are used to indicate the health of your business. An implementer can create new metric tiles, modify existing ones, or delete tiles entirely.

Adding a New Tile

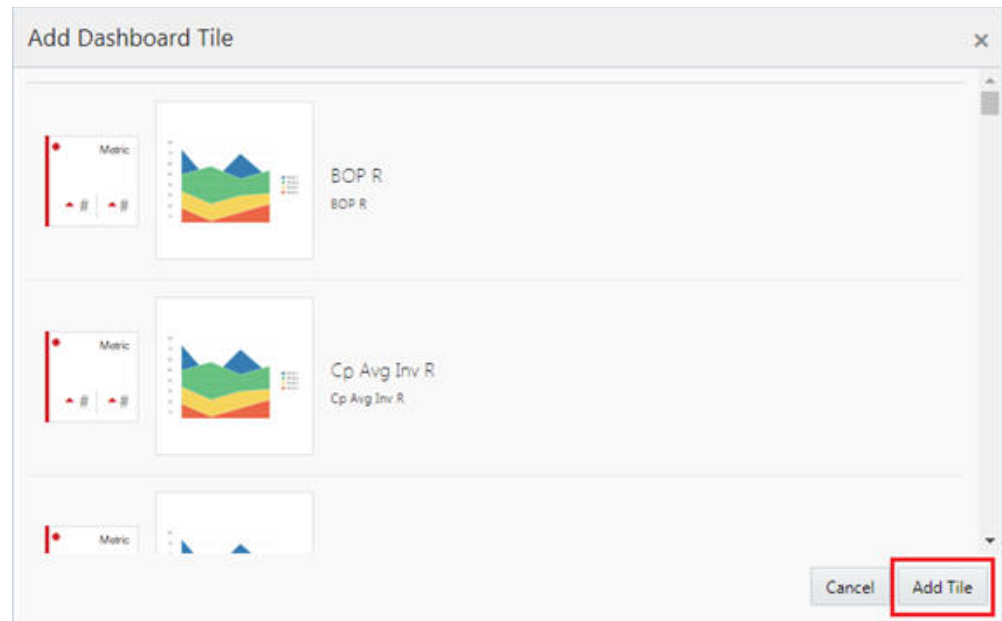
You can add a metric tile from an existing pool of tiles. To add a new tile, click **Plus** on the right hand side of the metric tile carousel (some scrolling may be required).

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.

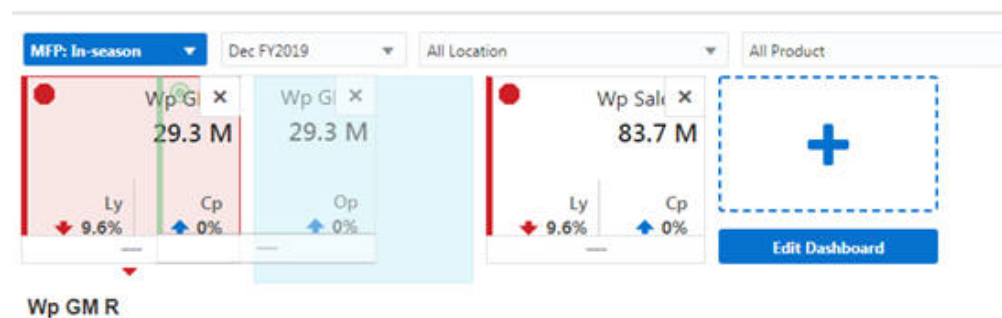
Figure 3–9 Available Metric Tiles



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.

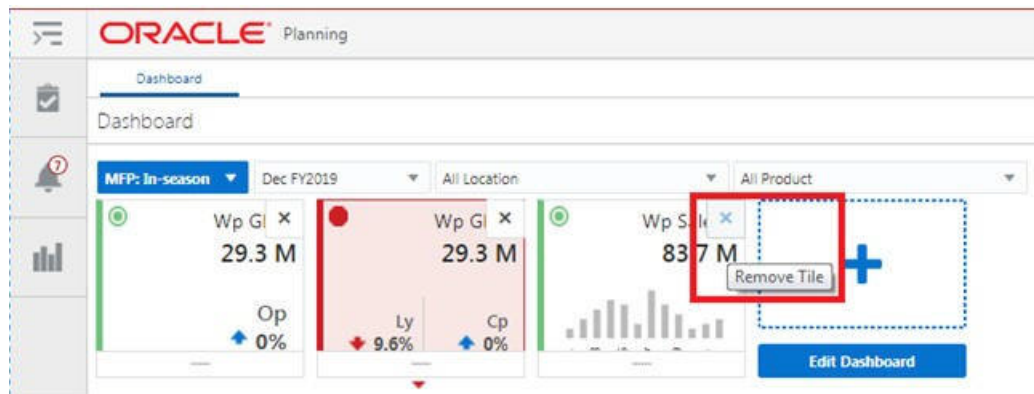
Figure 3–10 Changing the Display Order



Removing a Tile

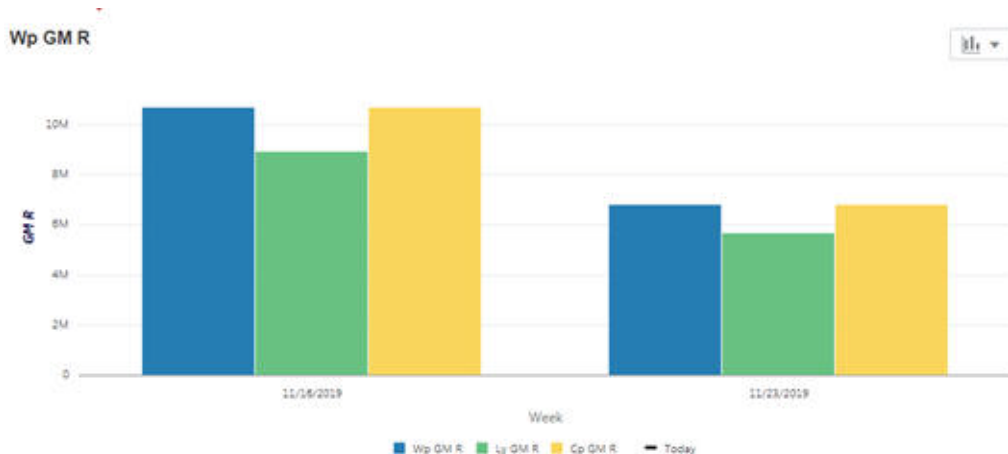
To remove a tile, enter edit mode by clicking the **Edit Dashboard**. In addition to the drag bar, each tile also displays a Delete icon in the upper right corner. Click **Delete** to remove the measure. Note that the measure can still be added from the metric tile pool.

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

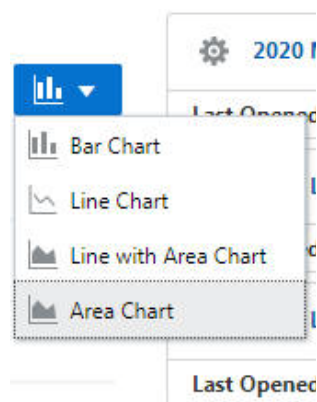
Main Chart

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

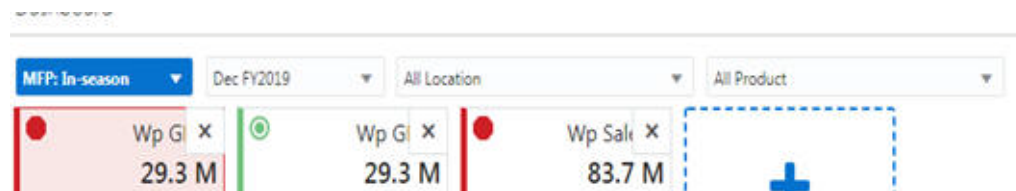
Modifying the Chart Type

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

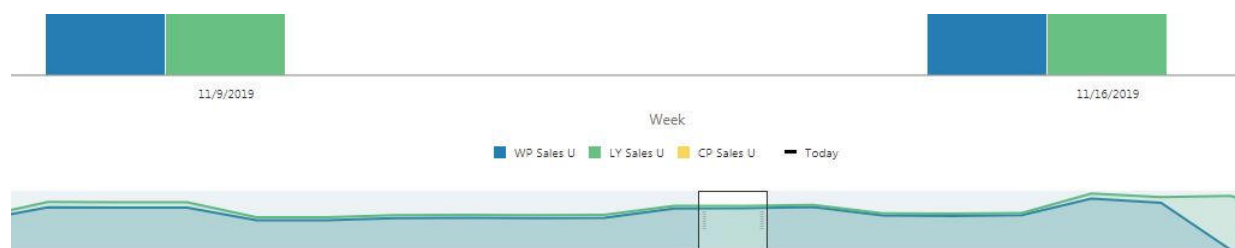
Filters

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

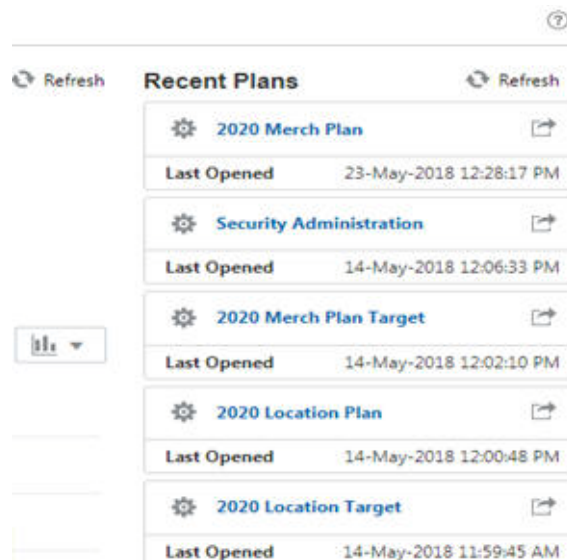
Time Horizon

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

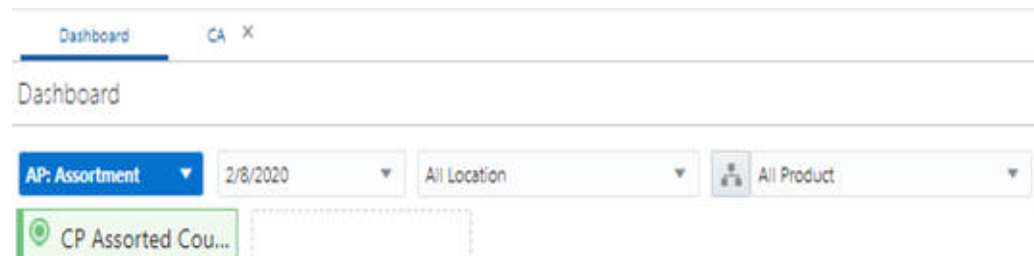
You can view and select from a list of most recently visited workspaces by choosing a workspace from the Recent Plan/Workspaces section in the top right of the screen. This does not list all available workspaces, only the most recent. Use **Refresh** to update the list with the most recent plans.

Figure 3–16 Recent Plans


| Recent Plans | |
|-------------------------|-------------------------------------|
| 2020 Merch Plan | Last Opened 23-May-2018 12:28:17 PM |
| Security Administration | Last Opened 14-May-2018 12:06:33 PM |
| 2020 Merch Plan Target | Last Opened 14-May-2018 12:02:10 PM |
| 2020 Location Plan | Last Opened 14-May-2018 12:00:48 PM |
| 2020 Location Target | Last Opened 14-May-2018 11:59:45 AM |

Dynamic Hierarchy Roll-Up

The dynamic roll-up of the Dashboard using the required product attributes and the roll-up of data happen dynamically within the dashboard. This helps the planner to view the dashboard using different product attributes and to analyze how to view the data. The placeholder positions created might have some of the attributes unassigned with values, so there is also support for the unassigned values and the roll-up happens accordingly for the selected attribute values.

Figure 3–17 Dynamic Hierarchy Roll-Up


Dashboard CA X

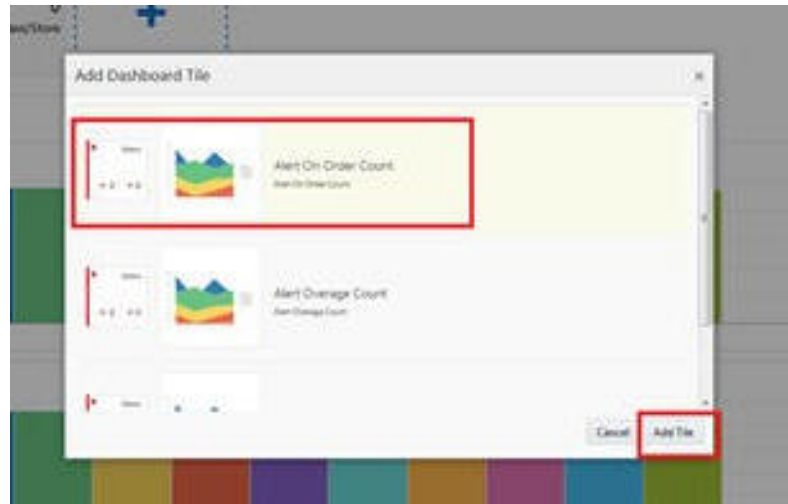
Dashboard

AP: Assortment ▼ 2/8/2020 ▼ All Location ▼ All Product ▼

CP Assorted Cou...

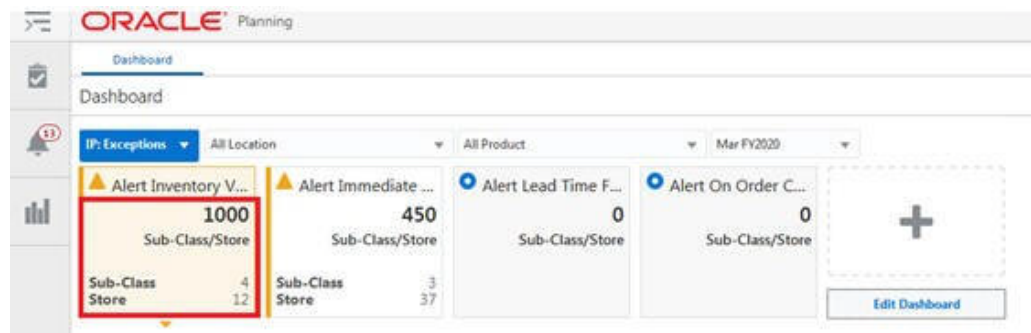
Exception Dashboard

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 3–18 Exception Dashboard

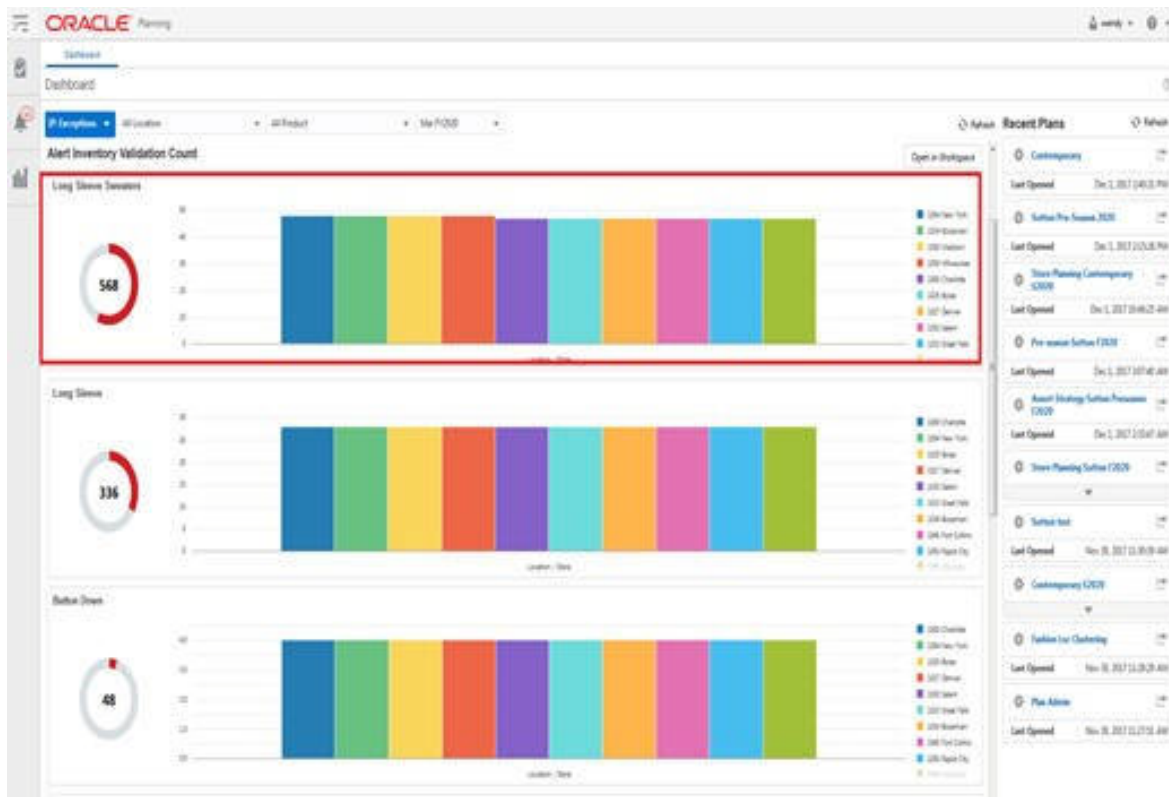
Exception tiles provide a summary of how many exceptional conditions exist within the plans you created and provide secondary information describing roughly the distribution of the exceptions across the data segments.

As shown in [Figure 3–19](#), the selected tile has a 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.

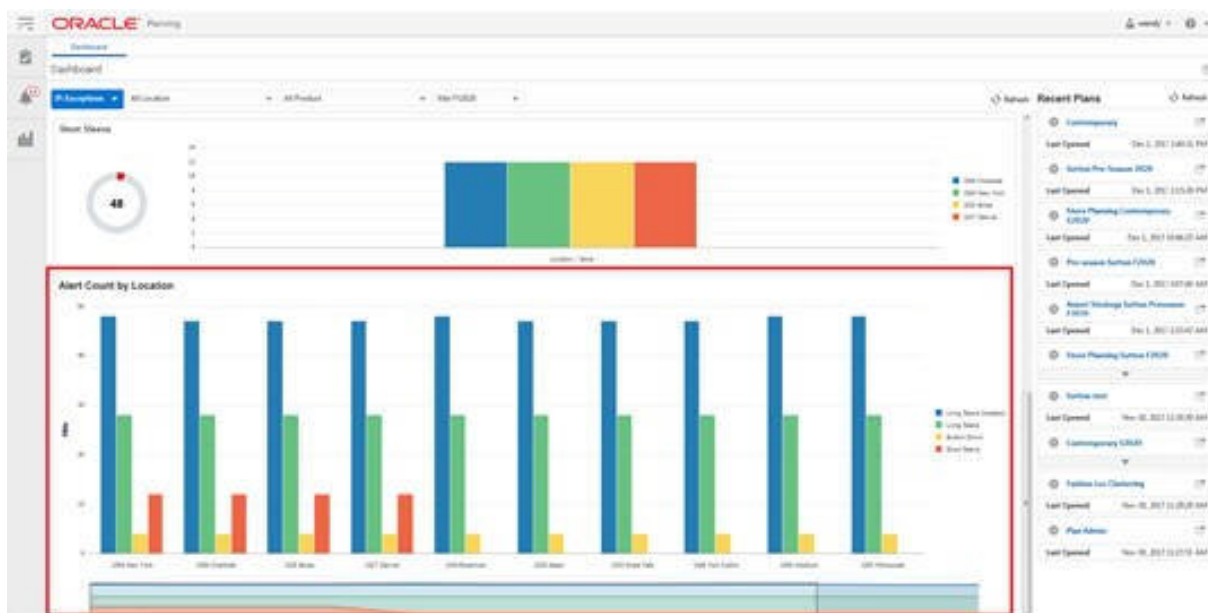
Figure 3–19 Exception Tile Summary

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 3–20](#), the Long Sleeve Sweaters subclass has 568 exceptions across several location that are displayed in the graph legend.

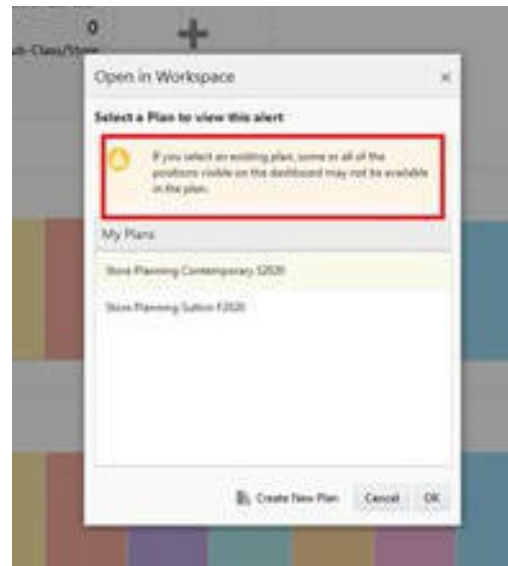
Figure 3–20 Example Sweater Exceptions

As shown in Figure 3–21, 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 3–21 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 3–22 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 14, "Real Time Alerts"](#) for more information on alert navigation.

Figure 3–23 Resolve Exceptions

| | 8/22/2019 | 9/5/2019 | 9/19/2019 | 10/3/2019 | 10/17/2019 | 10/31/2019 | 11/14/2019 | 11/28/2019 | 12/12/2019 | 12/26/2019 | 12/10/2019 | 12/24/2019 | 12/7/2019 |
|----------------------|-----------|----------|-----------|-----------|------------|------------|------------|------------|------------|------------|------------|------------|-----------|
| What-if Cover Ratio | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Required Inventory U | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP WOS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP Inv Turn % | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP EOP C | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP EOP AUC | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP Net Sales C | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP Net Sales AUC | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP Receipts C | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP Receipts AUC | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| On Order C | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| On Order AUC | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP EOP C | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP EOP AUC | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP EOP C | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP EOP AUC | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP EOP C | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP EOP AUC | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP EOP C | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WIP EOP AUC | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

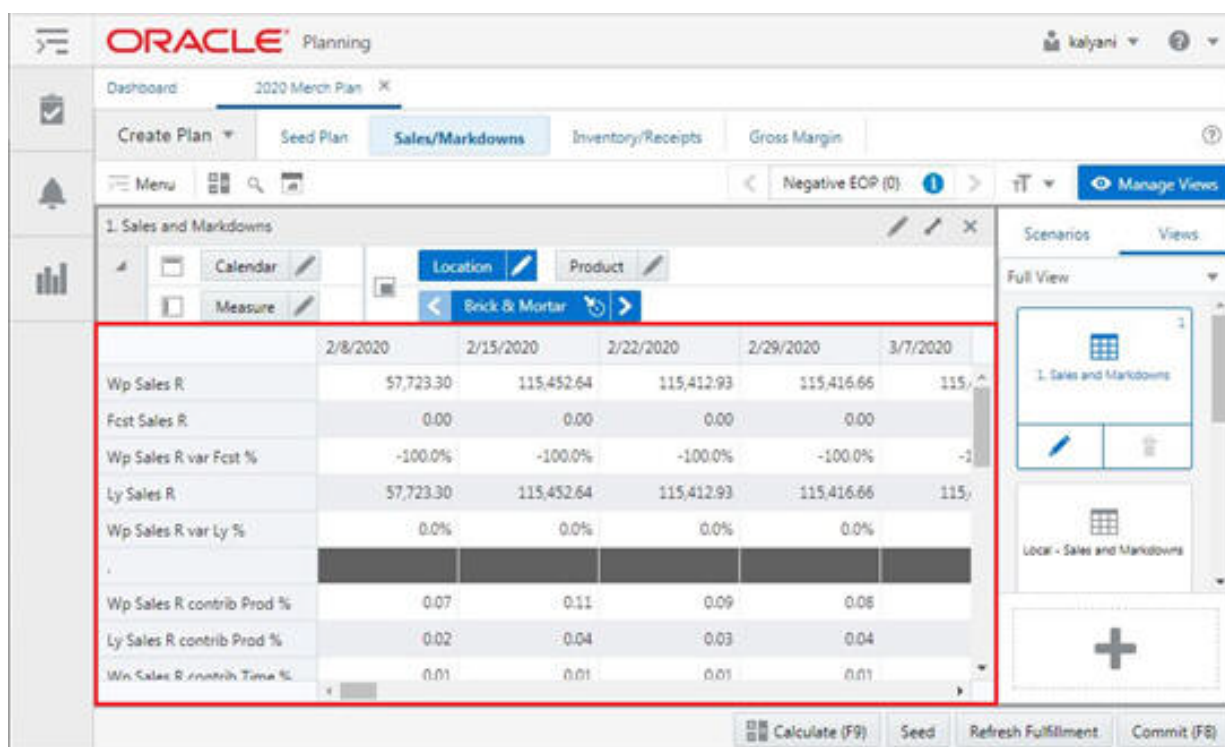
Workspaces

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.

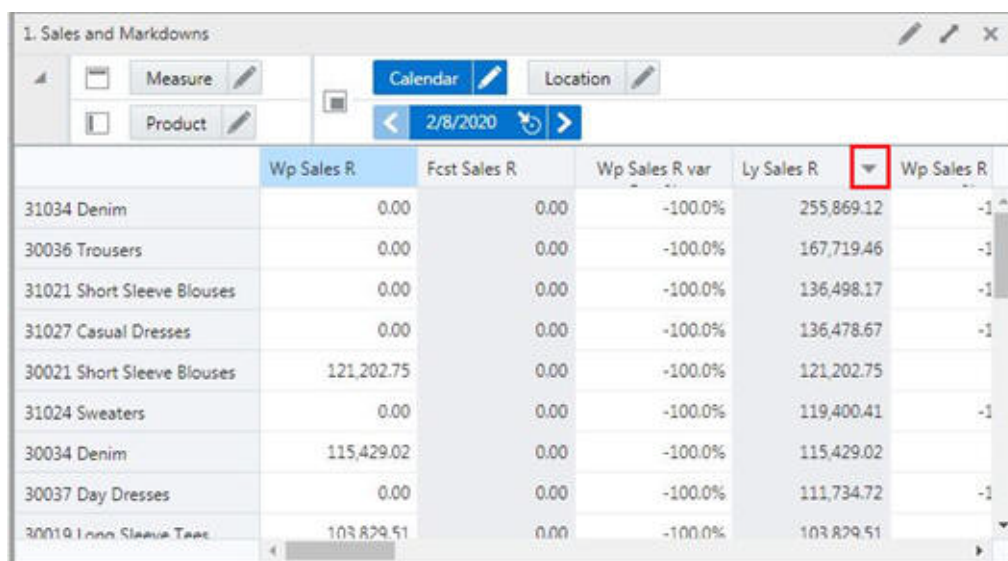
The sorting occurs along a single measure, using only a single level in the sort. The sorting is limited to the current view, so you can see the same data sorted differently in different views. Sorting is only available in the pivot table, not the graph view.

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). Performing a dimension move or swap resets the sort.

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



The screenshot shows a pivot table titled "1. Sales and Markdowns". The table has columns for "Wp Sales R", "Fcst Sales R", "Wp Sales R var", "Ly Sales R", and "Wp Sales R". The "Wp Sales R" column header has a small downward arrow icon, indicating it is the current sort order. The table contains data for various clothing items, including Denim, Trousers, Short Sleeve Blouses, Casual Dresses, Sweaters, and Day Dresses. The values are sorted in ascending order based on the "Wp Sales R" column.

| | Wp Sales R | Fcst Sales R | Wp Sales R var | Ly Sales R | Wp Sales R |
|----------------------------|------------|--------------|----------------|------------|------------|
| 31034 Denim | 0.00 | 0.00 | -100.0% | 255,869.12 | -1 |
| 30036 Trousers | 0.00 | 0.00 | -100.0% | 167,719.46 | -1 |
| 31021 Short Sleeve Blouses | 0.00 | 0.00 | -100.0% | 136,498.17 | -1 |
| 31027 Casual Dresses | 0.00 | 0.00 | -100.0% | 136,478.67 | -1 |
| 30021 Short Sleeve Blouses | 121,202.75 | 0.00 | -100.0% | 121,202.75 | |
| 31024 Sweaters | 0.00 | 0.00 | -100.0% | 119,400.41 | -1 |
| 30034 Denim | 115,429.02 | 0.00 | -100.0% | 115,429.02 | |
| 30037 Day Dresses | 0.00 | 0.00 | -100.0% | 111,734.72 | -1 |
| 30019 Long Sleeve Tees | 103,829.51 | 0.00 | -100.0% | 103,829.51 | |

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 Sort by Ascending Order

| | Wp Sales R | Fcst Sales R | Wp Sales R var | Ly Sales R | Wp Sales R var Ly | | Wp Sales R | Ly Sales R contri |
|--------------------------|------------|--------------|----------------|--------------|-------------------|--|------------|-------------------|
| 600 Women's Classics | 0.00 | 0.00 | -100.0% | 380,768.54 | -100.0% | | 0.00 | 0.1 |
| 30035 Sweaters | 0.00 | 0.00 | -100.0% | 24,451.98 | -100.0% | | 0.00 | 0.0 |
| 30038 Formal | 0.00 | 0.00 | -100.0% | 76,862.38 | -100.0% | | 0.00 | 0.1 |
| 30037 Day Dresses | 0.00 | 0.00 | -100.0% | 111,734.72 | -100.0% | | 0.00 | 0.1 |
| 30036 Trousers | 0.00 | 0.00 | -100.0% | 167,719.46 | -100.0% | | 0.00 | 0.4 |
| 500 Women's Casuals | 870,500.39 | 0.00 | -100.0% | 870,500.39 | 0.0% | | 1.00 | 0.1 |
| 30026 Day Dresses | 28,550.35 | 0.00 | -100.0% | 28,550.35 | 0.0% | | 0.03 | 0.0 |
| 30033 Shorts | 28,562.21 | 0.00 | -100.0% | 28,562.21 | 0.0% | | 0.03 | 0.0 |
| 30027 Casual Dresses | 28,571.68 | 0.00 | -100.0% | 28,571.68 | 0.0% | | 0.03 | 0.0 |
| 30022 Long Sleeve | 40,408.16 | 0.00 | -100.0% | 40,408.16 | 0.0% | | 0.05 | 0.0 |
| 505 Women's Casuals Fast | 0.00 | 0.00 | -100.0% | 1,142,377.89 | -100.0% | | 0.00 | 0.4 |
| 31033 Shorts | 0.00 | 0.00 | -100.0% | 28,081.02 | -100.0% | | 0.00 | 0.0 |
| 31018 Short Sleeve Tees | 0.00 | 0.00 | -100.0% | 28,089.46 | -100.0% | | 0.00 | 0.0 |
| 31026 Day Dresses | 0.00 | 0.00 | -100.0% | 34,122.07 | -100.0% | | 0.00 | 0.0 |
| 31023 Tanks and | 0.00 | 0.00 | -100.0% | 45,482.81 | -100.0% | | 0.00 | 0.0 |

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 Sort by Descending Order

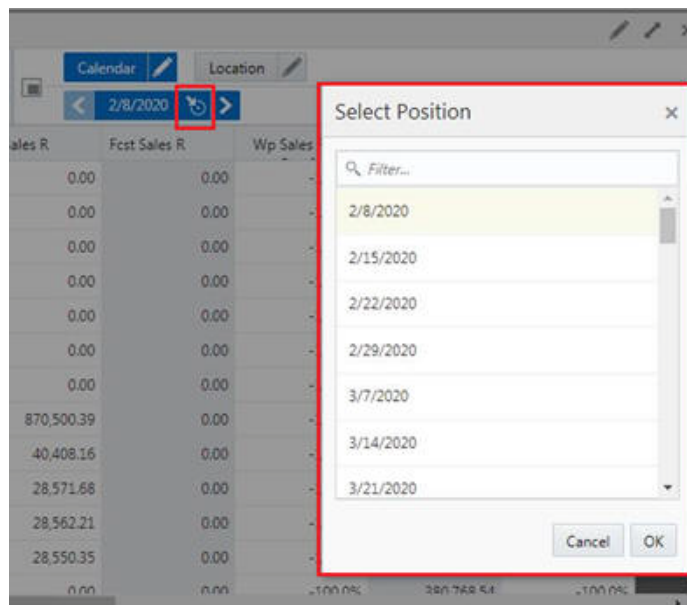
| | Wp Sales R | Fcst Sales R | Wp Sales R var | Ly Sales R | Wp Sales R var Ly | | Wp Sales R | Ly Sales R contri |
|--------------------------|------------|--------------|----------------|--------------|-------------------|--|------------|-------------------|
| 505 Women's Casuals Fast | 0.00 | 0.00 | -100.0% | 1,142,377.89 | -100.0% | | 0.00 | 0.4 |
| 31020 Sleeveless Blouses | 0.00 | 0.00 | -100.0% | 56,893.06 | -100.0% | | 0.00 | 0.0 |
| 31025 Skirts | 0.00 | 0.00 | -100.0% | 45,505.79 | -100.0% | | 0.00 | 0.0 |
| 31023 Tanks and | 0.00 | 0.00 | -100.0% | 45,482.81 | -100.0% | | 0.00 | 0.0 |
| 31026 Day Dresses | 0.00 | 0.00 | -100.0% | 34,122.07 | -100.0% | | 0.00 | 0.0 |
| 31018 Short Sleeve Tees | 0.00 | 0.00 | -100.0% | 28,089.46 | -100.0% | | 0.00 | 0.0 |
| 31033 Shorts | 0.00 | 0.00 | -100.0% | 28,081.02 | -100.0% | | 0.00 | 0.0 |
| 500 Women's Casuals | 870,500.39 | 0.00 | -100.0% | 870,500.39 | 0.0% | | 1.00 | 0.1 |
| 30022 Long Sleeve | 40,408.16 | 0.00 | -100.0% | 40,408.16 | 0.0% | | 0.05 | 0.0 |
| 30027 Casual Dresses | 28,571.68 | 0.00 | -100.0% | 28,571.68 | 0.0% | | 0.03 | 0.0 |
| 30033 Shorts | 28,562.21 | 0.00 | -100.0% | 28,562.21 | 0.0% | | 0.03 | 0.0 |
| 30026 Day Dresses | 28,550.35 | 0.00 | -100.0% | 28,550.35 | 0.0% | | 0.03 | 0.0 |
| 600 Women's Classics | 0.00 | 0.00 | -100.0% | 380,768.54 | -100.0% | | 0.00 | 0.3 |
| 30036 Trousers | 0.00 | 0.00 | -100.0% | 167,719.46 | -100.0% | | 0.00 | 0.4 |
| 30037 Day Dresses | 0.00 | 0.00 | -100.0% | 111,734.72 | -100.0% | | 0.00 | 0.1 |

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

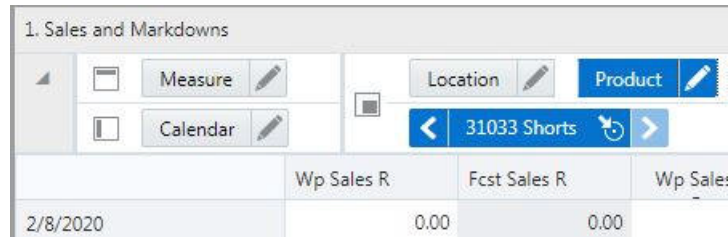
The z axis appears at the top of the View area and displays the dimensions on the z axis according to its current position in the dimension. You can scroll through the positions on the z axis to move through the data you are viewing in the x and y axes in the pivot table. If more than one dimension is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

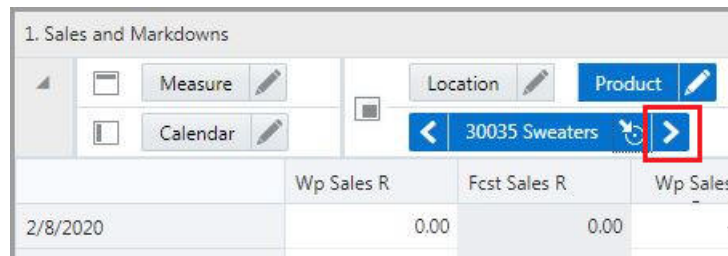
| 1. Sales and Markdowns | | | |
|------------------------|----------------|--------------|----------------|
| Measure | Location | Product | |
| Calendar | Brick & Mortar | | |
| | Wp Sales R | Fcst Sales R | Wp Sales R var |
| 2/8/2020 | 0.00 | 0.00 | -100.0% |

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

Figure 4–7 Product Z Axis


| 1. Sales and Markdowns | | | |
|------------------------|------------|--------------|----------|
| | Location | Product | |
| | | 31033 Shorts | |
| | Wp Sales R | Fcst Sales R | Wp Sales |
| 2/8/2020 | 0.00 | 0.00 | |

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 Location Position


| 1. Sales and Markdowns | | | |
|------------------------|------------|----------------|----------|
| | Location | Product | |
| | | 30035 Sweaters | |
| | Wp Sales R | Fcst Sales R | Wp Sales |
| 2/8/2020 | 0.00 | 0.00 | |

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:

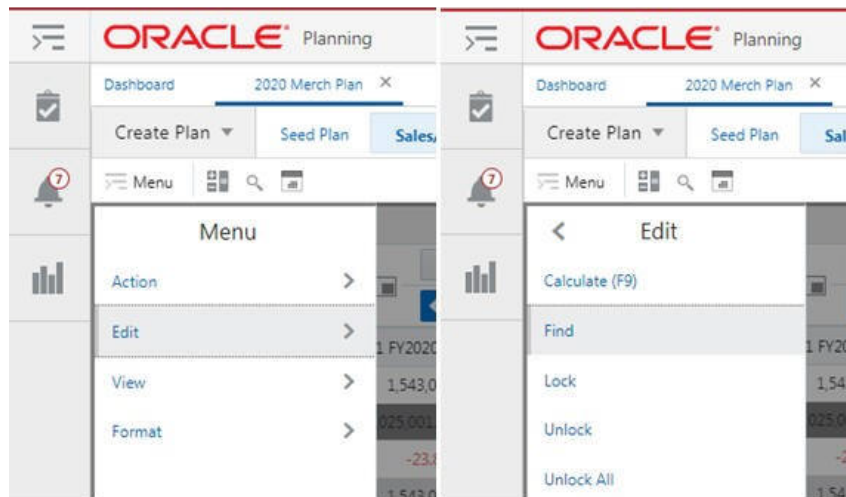
- The Find option in the Edit sub-menu of the Quick Access Toolbar menu
- The shortcut Ctrl + Shift + F from a selected pivot table cell
- The Find button on the Quick Access Toolbar

Using Find via the Quick Access Toolbar Menu

To use Find via the Quick Access Toolbar menu:

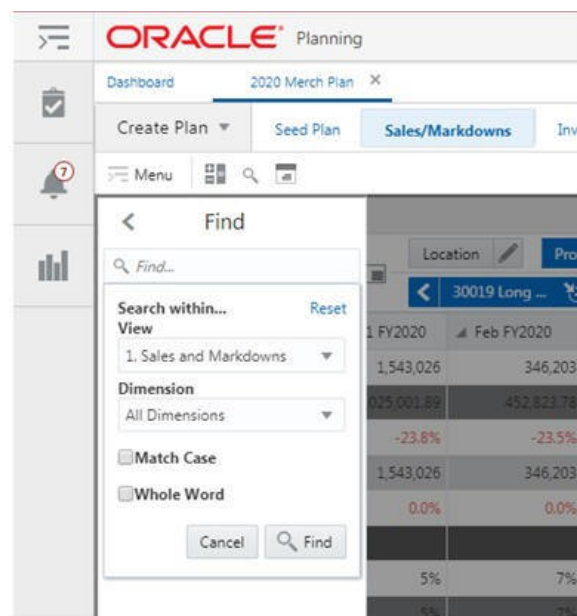
1. Click **Menu** to slide in the Main Menu .
2. Click **Edit**.
3. Click **Find**.

Figure 4–9 Find Using the Quick Access Toolbar Menu



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

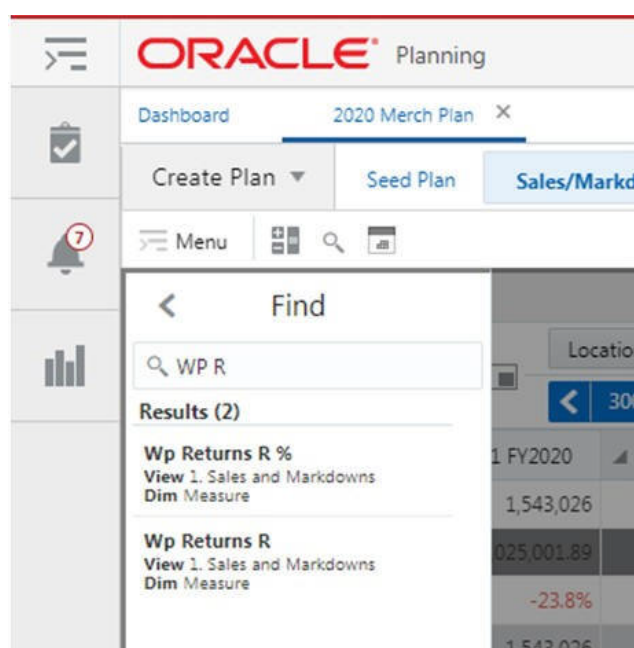
Figure 4–10 Find Panel



5. Enter the following criteria:
 - Enter the characters to search for in the Find input field.
 - If more than one 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 "[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

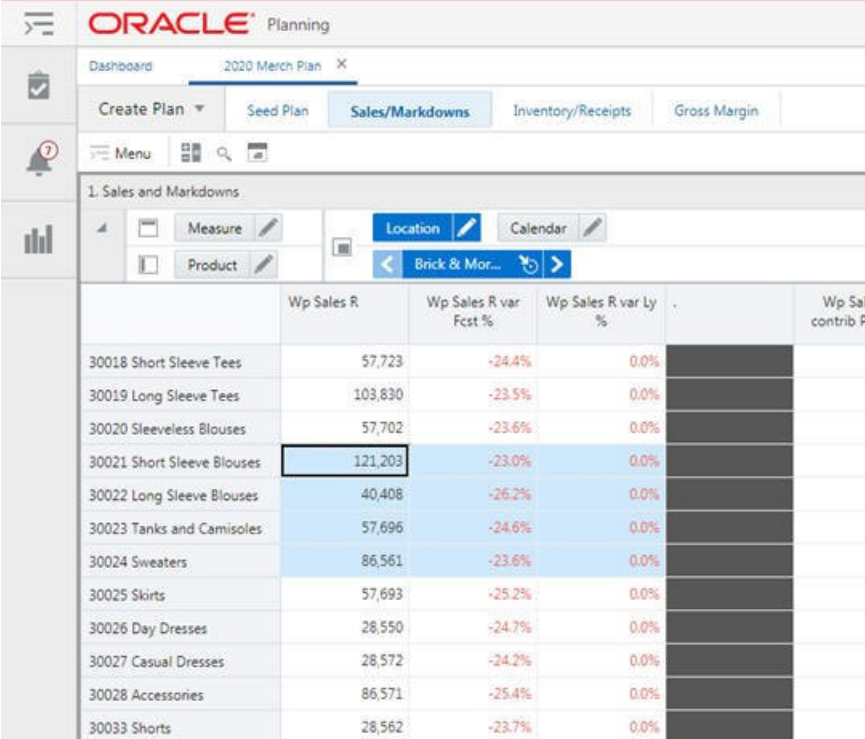
To select a group of contiguous cells, do one of the following:

- 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



| | Wp Sales R | Wp Sales R var Fcst % | Wp Sales R var Ly % | Wp Sale contrib Pr |
|----------------------------|------------|-----------------------|---------------------|--------------------|
| 30018 Short Sleeve Tees | 57,723 | -24.4% | 0.0% | |
| 30019 Long Sleeve Tees | 103,830 | -23.5% | 0.0% | |
| 30020 Sleeveless Blouses | 57,702 | -23.6% | 0.0% | |
| 30021 Short Sleeve Blouses | 121,203 | -23.0% | 0.0% | |
| 30022 Long Sleeve Blouses | 40,408 | -26.2% | 0.0% | |
| 30023 Tanks and Camisoles | 57,696 | -24.6% | 0.0% | |
| 30024 Sweaters | 86,561 | -23.6% | 0.0% | |
| 30025 Skirts | 57,693 | -25.2% | 0.0% | |
| 30026 Day Dresses | 28,550 | -24.7% | 0.0% | |
| 30027 Casual Dresses | 28,572 | -24.2% | 0.0% | |
| 30028 Accessories | 86,571 | -25.4% | 0.0% | |
| 30033 Shorts | 28,562 | -23.7% | 0.0% | |

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 of Non-Contiguous Cells

The screenshot shows the Oracle Planning application interface. The top navigation bar includes 'Dashboard', '2020 Merch Plan', and tabs for 'Create Plan', 'Seed Plan', 'Sales/Markdowns', 'Inventory/Receipts', and 'Gross Profit'. The main area displays a pivot table titled '1. Sales and Markdowns'. The table has columns for 'Wp Sales R', 'Wp Sales R var Fcst %', and 'Wp Sales R var Ly %'. The rows list various clothing items. The cell for '30022 Long Sleeve Blouses' is highlighted with a blue border.

| | Wp Sales R | Wp Sales R var Fcst % | Wp Sales R var Ly % |
|----------------------------|------------|-----------------------|---------------------|
| 30018 Short Sleeve Tees | 58,497 | -23.4% | 1.3% |
| 30019 Long Sleeve Tees | 103,830 | -23.5% | 0.0% |
| 30020 Sleeveless Blouses | 57,702 | -23.6% | 0.0% |
| 30021 Short Sleeve Blouses | 121,203 | -23.0% | 0.0% |
| 30022 Long Sleeve Blouses | 40,408 | -26.2% | 0.0% |
| 30023 Tanks and Camisoles | 57,696 | -24.6% | 0.0% |
| 30024 Sweaters | 86,561 | -23.6% | 0.0% |
| 30025 Skirts | 57,693 | -25.2% | 0.0% |
| 30026 Day Dresses | 28,550 | -24.7% | 0.0% |
| 30027 Casual Dresses | 28,572 | -24.2% | 0.0% |
| 30028 Accessories | 86,571 | -25.4% | 0.0% |
| 30033 Shorts | 28,562 | -23.7% | 0.0% |
| 30034 Denim | 115,429 | -23.9% | 0.0% |

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 20. Note that this formula does not follow operator precedence logic, but evaluates from right to left.

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

The screenshot shows the Oracle Planning application interface. At the top, there's a navigation bar with 'ORACLE Planning' and tabs for 'Dashboard', '2020 Merch Plan', 'Create Plan', 'Seed Plan', 'Sales/Markdowns', 'Inventory/Receipts', and 'Gross Margin'. Below this is a menu bar with 'Menu', 'Measure', 'Location', 'Calendar', and 'Product'. The main area displays a table titled '1. Sales and Markdowns'. The table has columns for 'Wp Sales R', 'Wp Sales R var Fcst %', and 'Wp Sales R var Ly %'. A context menu is open over the 'Wp Sales R' header, showing options: 'Format', 'Lock Column', 'Unlock Column', 'Unlock All', and 'Fill'. The table lists various clothing items like '30018 Short Sleeve Tees', '30019 Long Sleeve Tees', etc., with their respective sales and variance values.

| | Wp Sales R | Wp Sales R var Fcst % | Wp Sales R var Ly % |
|----------------------------|------------|-----------------------|---------------------|
| 30018 Short Sleeve Tees | | -23.4% | 1.3% |
| 30019 Long Sleeve Tees | | -23.5% | 0.0% |
| 30020 Sleeveless Blouses | | -23.6% | 0.0% |
| 30021 Short Sleeve Blouses | | -23.0% | 0.0% |
| 30022 Long Sleeve Blouses | | -26.2% | 0.0% |
| 30023 Tanks and Camisoles | 57,696 | -24.6% | 0.0% |
| 30024 Sweaters | 86,561 | -23.6% | 0.0% |
| 30025 Skirts | 57,693 | -25.2% | 0.0% |
| 30026 Day Dresses | 28,550 | -24.7% | 0.0% |
| 30027 Casual Dresses | 28,572 | -24.2% | 0.0% |
| 30028 Accessories | 86,571 | -25.4% | 0.0% |
| 30033 Shorts | 28,562 | -23.7% | 0.0% |
| 30034 Denim | 115,429 | -23.9% | 0.0% |

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 for Measure Wp Net Sales R*

Format

✕

Current Selection

Styles

Exceptions

Measures: Wp Net Sales R

Views: 1. Sales and Markdowns, Local - Sales and Markdowns, Returns Maintenance Setup, W/F - Sales and Markdowns

Basic Formatting

Cell Format

▼

Text Format

▼

B

/

U

Clear

Number Formatting

Quick Format

Prefix

Suffix

Scale

Decimal Places

Show Separator

▼

1

2

▼

▲

Clear

Header Formatting

Cell Format

Text Format

▼

▼

B

/

U

Clear

Preview

Header

1,234.12

Apply

Cancel

Save

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 Values

1. Sales and Markdowns

Measure Location Product

Calendar 30035 Sweaters

| | Wp Sales R | Fcst Sales R | Wp Sales R var | Ly Sales R | Wp |
|-----------|------------|--------------|----------------|------------|----|
| 2/8/2020 | 0.00 | 0.00 | -100.0% | 24k | |
| 2/15/2020 | 0.00 | 0.00 | -100.0% | 87k | |
| 2/22/2020 | 0.00 | 0.00 | -100.0% | 147k | |
| 2/29/2020 | 0.00 | 0.00 | -100.0% | 45k | |
| 3/7/2020 | 0.00 | 0.00 | -100.0% | 42k | |
| 3/14/2020 | 0.00 | 0.00 | -100.0% | 28k | |
| 3/21/2020 | 0.00 | 0.00 | -100.0% | 39k | |
| 3/28/2020 | 0.00 | 0.00 | -100.0% | 51k | |
| 4/4/2020 | 0.00 | 0.00 | -100.0% | 62k | |
| 4/11/2020 | 0.00 | 0.00 | -100.0% | 29k | |
| 4/18/2020 | 0.00 | 0.00 | -100.0% | 33k | |
| 4/25/2020 | 0.00 | 0.00 | -100.0% | 146k | |
| 5/2/2020 | 0.00 | 0.00 | -100.0% | 42k | |

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.

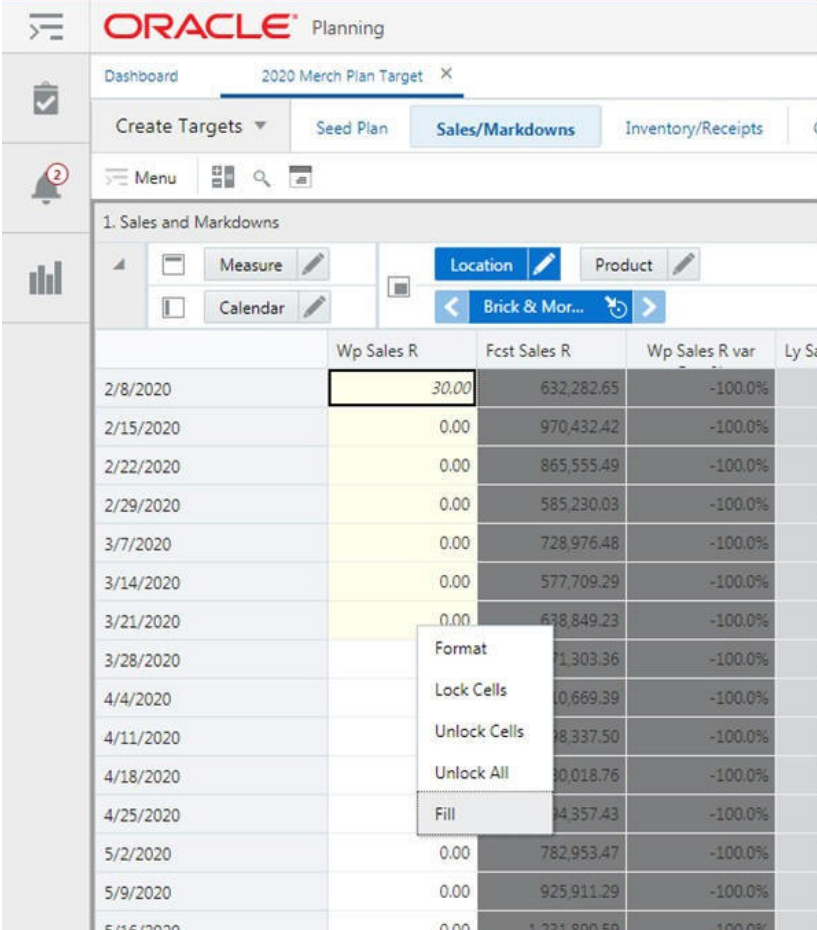
Fill Cells in a View

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

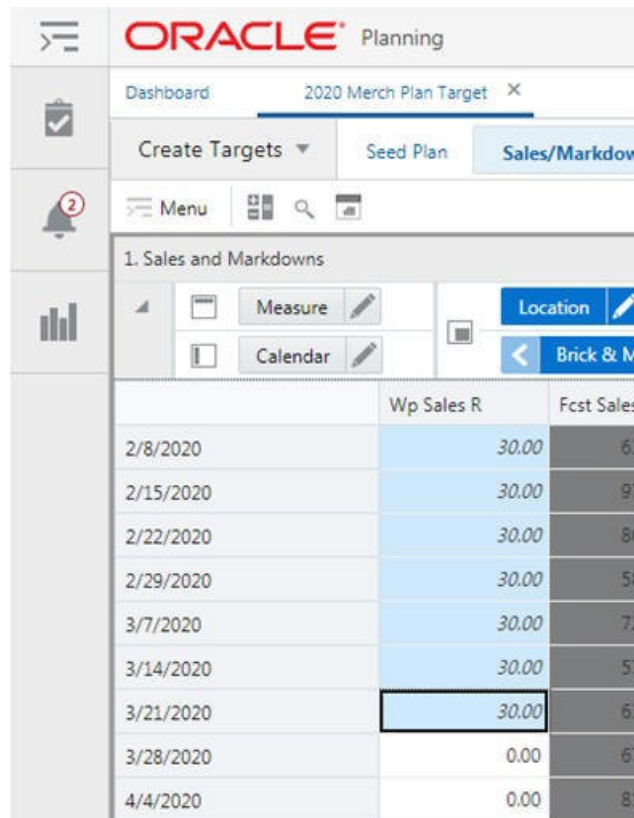


The screenshot shows the Oracle Planning application interface. The top navigation bar includes 'Dashboard', '2020 Merch Plan Target', and tabs for 'Create Targets', 'Seed Plan', 'Sales/Markdowns', and 'Inventory/Receipts'. The main area displays a table with columns: 'Wp Sales R', 'Fcst Sales R', 'Wp Sales R var', and 'Ly Sa'. The table contains data for various dates from 2/8/2020 to 5/16/2020. A right-click context menu is open over the cell containing '30.00' in the 'Wp Sales R' column for the date 2/8/2020. The menu options are: Format, Lock Cells, Unlock Cells, Unlock All, and Fill.

| | Wp Sales R | Fcst Sales R | Wp Sales R var | Ly Sa |
|-----------|------------|--------------|----------------|-------|
| 2/8/2020 | 30.00 | 632,282.65 | -100.0% | |
| 2/15/2020 | 0.00 | 970,432.42 | -100.0% | |
| 2/22/2020 | 0.00 | 865,555.49 | -100.0% | |
| 2/29/2020 | 0.00 | 585,230.03 | -100.0% | |
| 3/7/2020 | 0.00 | 728,976.48 | -100.0% | |
| 3/14/2020 | 0.00 | 577,709.29 | -100.0% | |
| 3/21/2020 | 0.00 | 638,849.23 | -100.0% | |
| 3/28/2020 | | 1,303.36 | -100.0% | |
| 4/4/2020 | | 0,669.39 | -100.0% | |
| 4/11/2020 | | 8,337.50 | -100.0% | |
| 4/18/2020 | | 0,018.76 | -100.0% | |
| 4/25/2020 | | 4,357.43 | -100.0% | |
| 5/2/2020 | 0.00 | 782,953.47 | -100.0% | |
| 5/9/2020 | 0.00 | 925,911.29 | -100.0% | |
| 5/16/2020 | 0.00 | 1,231,890.59 | -100.0% | |

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

Figure 4–19 Source Cell Value



| | Wp Sales R | Fcst Sales |
|-----------|------------|------------|
| 2/8/2020 | 30.00 | 6 |
| 2/15/2020 | 30.00 | 9 |
| 2/22/2020 | 30.00 | 8 |
| 2/29/2020 | 30.00 | 5 |
| 3/7/2020 | 30.00 | 7 |
| 3/14/2020 | 30.00 | 5 |
| 3/21/2020 | 30.00 | 6 |
| 3/28/2020 | 0.00 | 6 |
| 4/4/2020 | 0.00 | 8 |

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.

Modify Data with Cell Formulas (Smart Edits)

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.

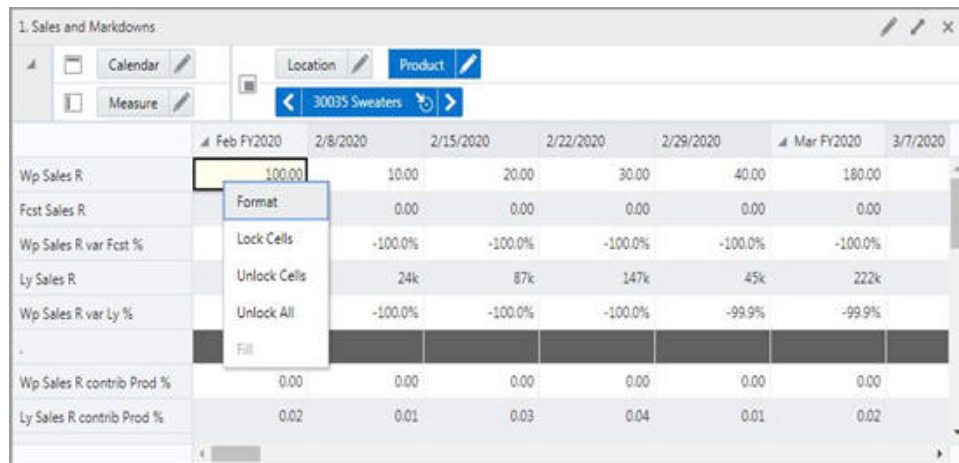
For example, you may want to see the effect of a change to sales value on inventory levels without forcing a change to receipts. Or, you may want to change a sales value at an aggregate level (such as month) and spread the results to only three of the four weeks that comprise that month. In this case, 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**.

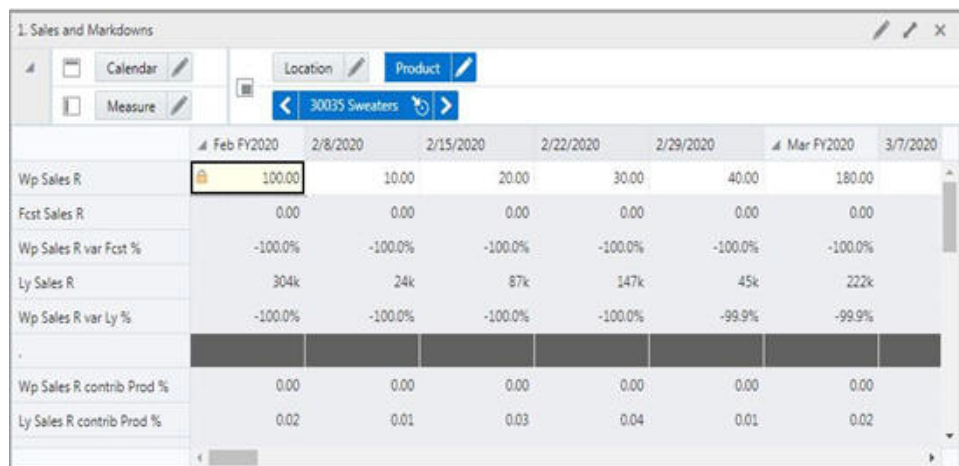
Figure 4–20 Lock Month Level Cell



| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 | 2/29/2020 | Mar FY2020 | 3/7/2020 |
|---------------------------|------------|----------|-----------|-----------|-----------|------------|----------|
| Wp Sales R | 100.00 | 10.00 | 20.00 | 30.00 | 40.00 | 180.00 | |
| Fcst Sales R | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Wp Sales R var Fcst % | | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | |
| Ly Sales R | | 24k | 87k | 147k | 45k | 222k | |
| Wp Sales R var Ly % | | -100.0% | -100.0% | -100.0% | -99.9% | -99.9% | |
| Wp Sales R contrib Prod % | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Ly Sales R contrib Prod % | 0.02 | 0.01 | 0.03 | 0.04 | 0.01 | 0.02 | |

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

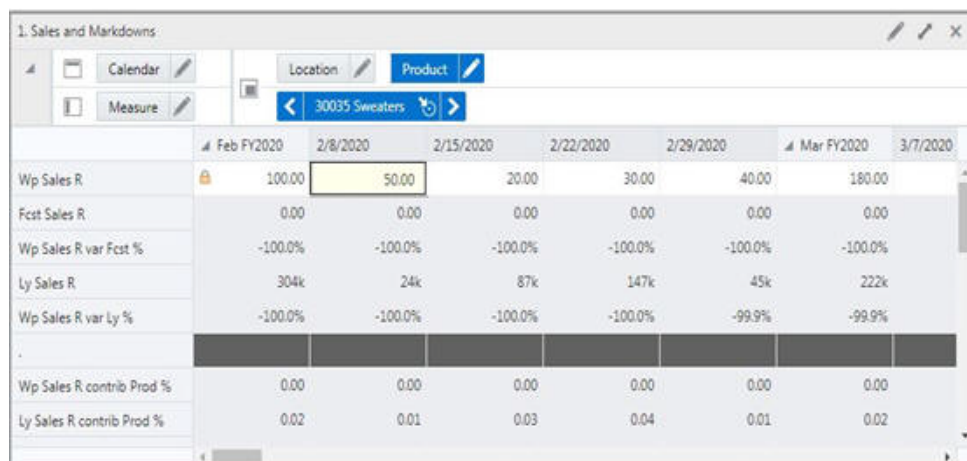
Figure 4–21 Lock Cell Lock Icon



| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 | 2/29/2020 | Mar FY2020 | 3/7/2020 |
|---------------------------|------------|----------|-----------|-----------|-----------|------------|----------|
| Wp Sales R | 100.00 | 10.00 | 20.00 | 30.00 | 40.00 | 180.00 | |
| Fcst Sales R | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Wp Sales R var Fcst % | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | |
| Ly Sales R | 304k | 24k | 87k | 147k | 45k | 222k | |
| Wp Sales R var Ly % | -100.0% | -100.0% | -100.0% | -100.0% | -99.9% | -99.9% | |
| Wp Sales R contrib Prod % | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Ly Sales R contrib Prod % | 0.02 | 0.01 | 0.03 | 0.04 | 0.01 | 0.02 | |

3. Increase the first week of the month.

Figure 4–22 Increase the First Week



| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 | 2/29/2020 | Mar FY2020 | 3/7/2020 |
|---------------------------|------------|----------|-----------|-----------|-----------|------------|----------|
| Wp Sales R | 50.00 | 10.00 | 20.00 | 30.00 | 40.00 | 180.00 | |
| Fcst Sales R | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Wp Sales R var Fcst % | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | |
| Ly Sales R | 304k | 24k | 87k | 147k | 45k | 222k | |
| Wp Sales R var Ly % | -100.0% | -100.0% | -100.0% | -100.0% | -99.9% | -99.9% | |
| Wp Sales R contrib Prod % | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Ly Sales R contrib Prod % | 0.02 | 0.01 | 0.03 | 0.04 | 0.01 | 0.02 | |

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

Figure 4–23 Calculation Results

| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 | 2/29/2020 | Mar FY2020 | 3/7/2020 |
|---------------------------|------------|----------|-----------|-----------|-----------|------------|----------|
| Wp Sales R | 100.00 | 50.00 | 11.11 | 16.67 | 22.22 | 180.00 | |
| Fcst Sales R | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Wp Sales R var Fcst % | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | |
| Ly Sales R | 304k | 24k | 87k | 147k | 45k | 222k | |
| Wp Sales R var Ly % | -100.0% | -99.8% | -100.0% | -100.0% | -100.0% | -99.9% | |
| Wp Sales R contrib Prod % | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Ly Sales R contrib Prod % | 0.02 | 0.01 | 0.03 | 0.04 | 0.01 | 0.02 | |

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.

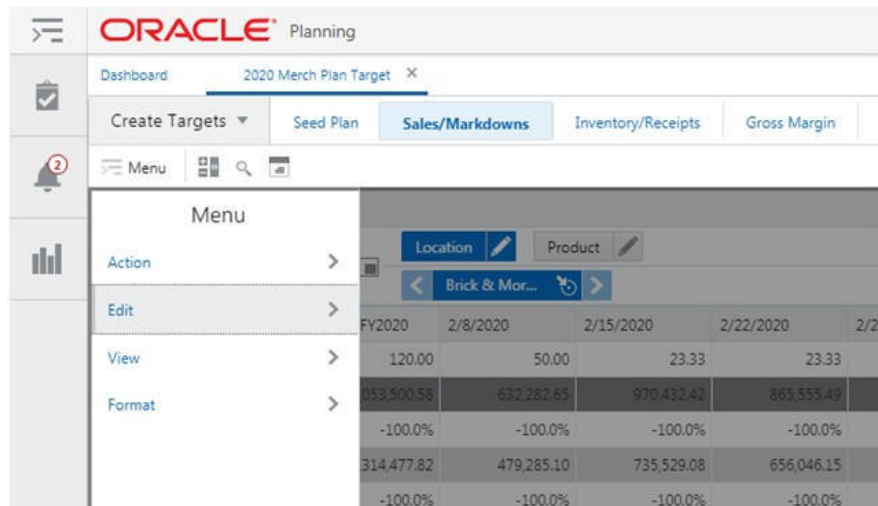
Note: You can only make a selection at one level in the headers of a multidimensional header. Locking and unlocking apply to the selected measure only. Locked measures are designated by a lock icon in the header text of the measure and in its cells.

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.

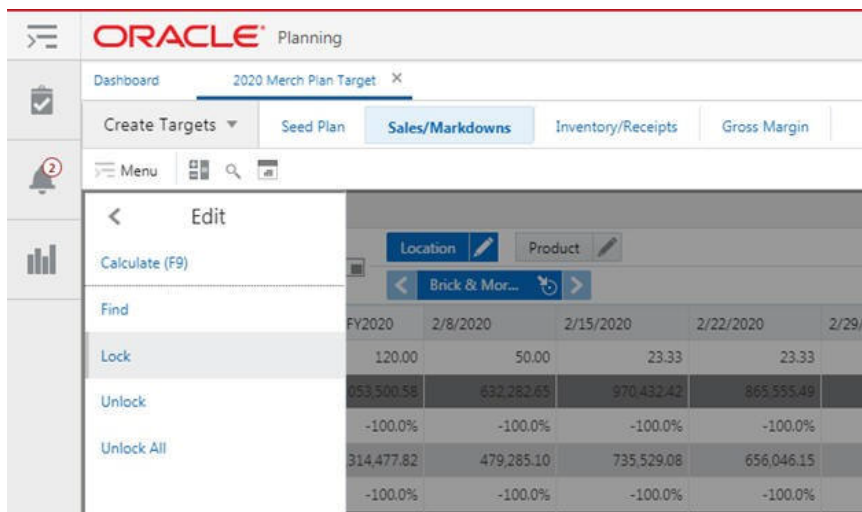
1. To lock an entire measure, left click the header of the measure.
2. Click **Menu/Edit**.

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

| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 | 2/29/2020 | Mar FY2020 | 3/7/2020 |
|---------------------------|------------|----------|-----------|-----------|-----------|------------|----------|
| Wp Sales R | 100.00 | 50.00 | 11.11 | 16.67 | 22.22 | 180.00 | |
| Fcst Sales R | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Wp Sales R var Fcst % | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | |
| Ly Sales R | 304k | 24k | 87k | 147k | 45k | 222k | |
| Wp Sales R var Ly % | -100.0% | -99.8% | -100.0% | -100.0% | -100.0% | -99.9% | |
| Wp Sales R contrib Prod % | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Ly Sales R contrib Prod % | 0.02 | 0.01 | 0.03 | 0.04 | 0.01 | 0.02 | |

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

| | 9/5/2020 | 9/12/2020 | 9/19/2020 | 9/26/2020 |
|--|----------|-----------|-----------|-----------|
| Missy Cardigan Sweaters | 100 | 90 | 120 | 103 |
| 54291800 - Contrast Elbow Patch Cardigan - Black | 26 | 26 | 39 | 39 |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 25 | 32 | 32 | 26 |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 49 | 32 | 49 | 39 |

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.

Figure 4–28 Locked Subclass

| | 9/5/2020 | 9/12/2020 | 9/19/2020 | 9/26/2020 |
|--|----------|-----------|-----------|-----------|
| Missy Cardigan Sweaters | 100 | 90 | 120 | 103 |
| 54291800 - Contrast Elbow Patch Cardigan - Black | 26 | 26 | 39 | 39 |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 25 | 32 | 32 | 26 |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 49 | 32 | 49 | 39 |

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 at the Style/Color level is locked, then the subclass total is adjusted at the higher level. This forces the unlocked Style/Color level positions to adjust while keeping the locked subclass unchanged.

1. To lock one of the Style/Color level positions, left click the header of the position..
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

| | 9/5/2020 | 9/12/2020 | 9/19/2020 | 9/26/2020 |
|--|----------|-----------|-----------|-----------|
| Missy Cardigan Sweaters | 100 | 90 | 120 | 103 |
| 54291800 - Contrast Elbow Patch Cardigan - Black | 26 | 26 | 39 | 39 |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 25 | 32 | 32 | 26 |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 49 | 32 | 49 | 39 |

4. Increase the subclass level value.

Figure 4–30 Increase the Group Level Value

1. Plan Sales & Margin

Calendar Location Measure

Product Brick & Mortar

| | 9/5/2020 | 9/12/2020 | 9/19/2020 | 9/26/2020 |
|--|----------|-----------|-----------|-----------|
| Missy Cardigan Sweaters | 120 | 100 | 140 | 103 |
| 54291800 - Contrast Elbow Patch Caridgan - Black | 26 | 26 | 39 | 39 |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 25 | 32 | 32 | 26 |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 49 | 32 | 49 | 39 |

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

Figure 4–31 Calculation Result

1. Plan Sales & Margin

Calendar Location Measure

Product Brick & Mortar

| | 9/5/2020 | 9/12/2020 | 9/19/2020 | 9/26/2020 |
|--|----------|-----------|-----------|-----------|
| Missy Cardigan Sweaters | 120 | 100 | 140 | 103 |
| 54291800 - Contrast Elbow Patch Caridgan - Black | 26 | 26 | 39 | 39 |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 31 | 37 | 40 | 26 |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 63 | 37 | 61 | 39 |

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

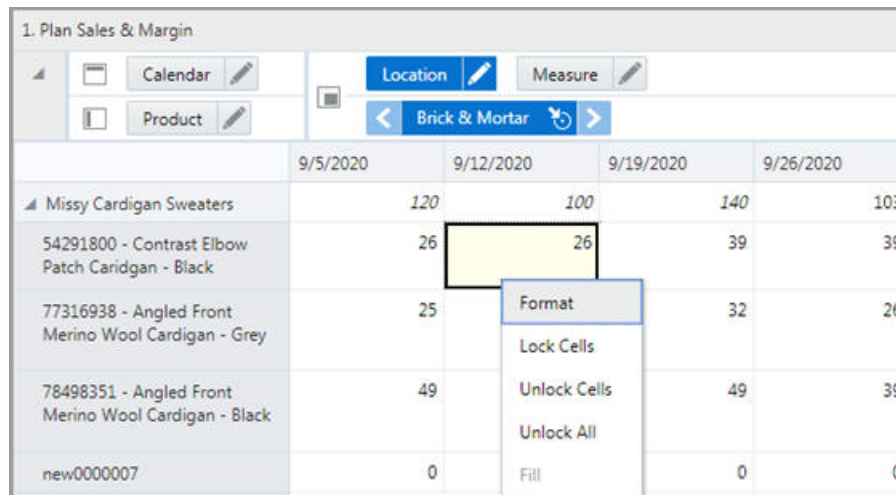
The following locking options are available.

- **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:

- 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 Menu



1. Plan Sales & Margin

Calendar Location Measure

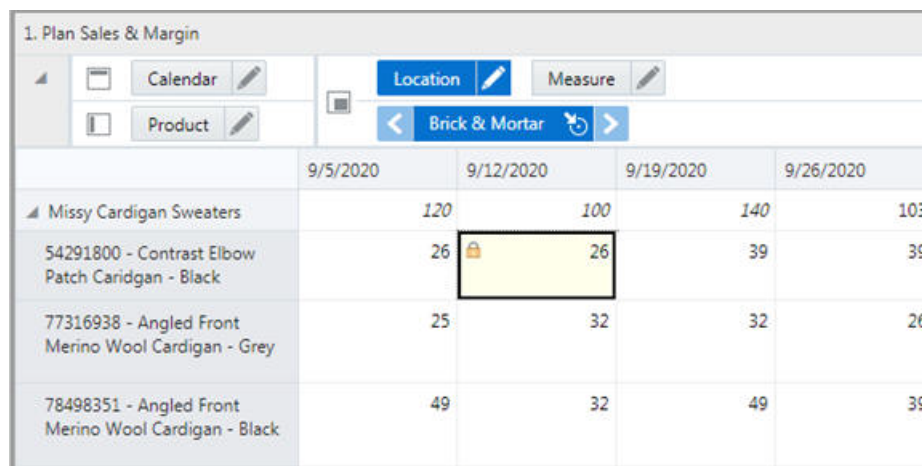
Product Brick & Mortar

| | 9/5/2020 | 9/12/2020 | 9/19/2020 | 9/26/2020 |
|--|----------|-----------|-----------|-----------|
| Missy Cardigan Sweaters | 120 | 100 | 140 | 103 |
| 54291800 - Contrast Elbow Patch Cardigan - Black | 26 | 26 | 39 | 39 |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 25 | | 32 | 26 |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 49 | | 49 | 39 |
| new0000007 | 0 | | 0 | 0 |

Context Menu Options: Format, Lock Cells, Unlock Cells, Unlock All, Fill

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

Figure 4–33 Lock Action



1. Plan Sales & Margin

Calendar Location Measure

Product Brick & Mortar

| | 9/5/2020 | 9/12/2020 | 9/19/2020 | 9/26/2020 |
|--|----------|-----------|-----------|-----------|
| Missy Cardigan Sweaters | 120 | 100 | 140 | 103 |
| 54291800 - Contrast Elbow Patch Cardigan - Black | 26 | 26 | 39 | 39 |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 25 | 32 | 32 | 26 |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 49 | 32 | 49 | 39 |

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

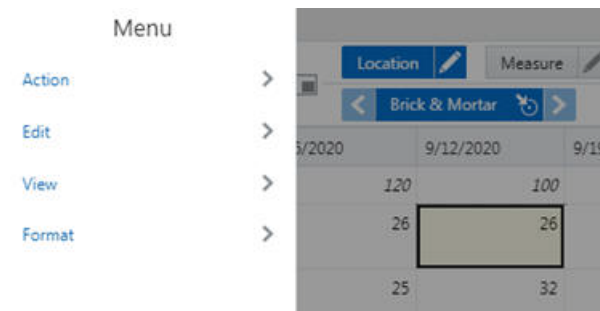
1. Plan Sales & Margin

Calendar Location Measure

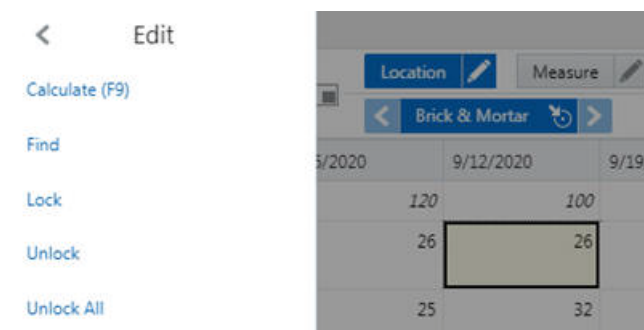
Product Brick & Mortar

| | 9/5/2020 | 9/12/2020 | 9/19/2020 | 9/26/2020 |
|--|----------|-----------|-----------|-----------|
| Missy Cardigan Sweaters | 120 | 100 | 140 | 103 |
| 54291800 - Contrast Elbow Patch Cardigan - Black | 26 | 26 | 39 | 39 |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 25 | 32 | 32 | 26 |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 49 | 32 | 49 | 39 |

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.

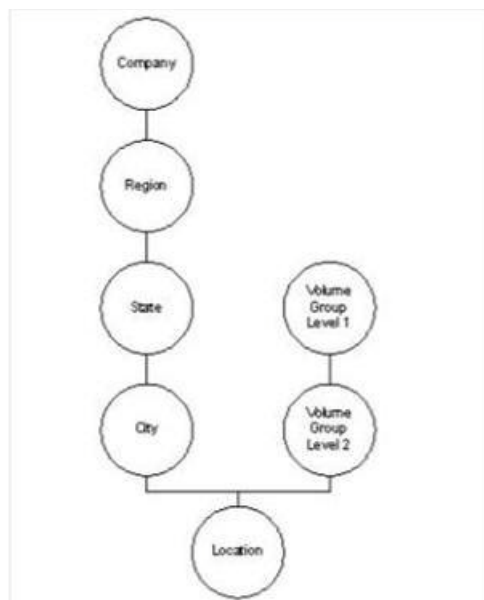
For example, consider the Rule 1 in a typical Product, Location, Calendar dimension.

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

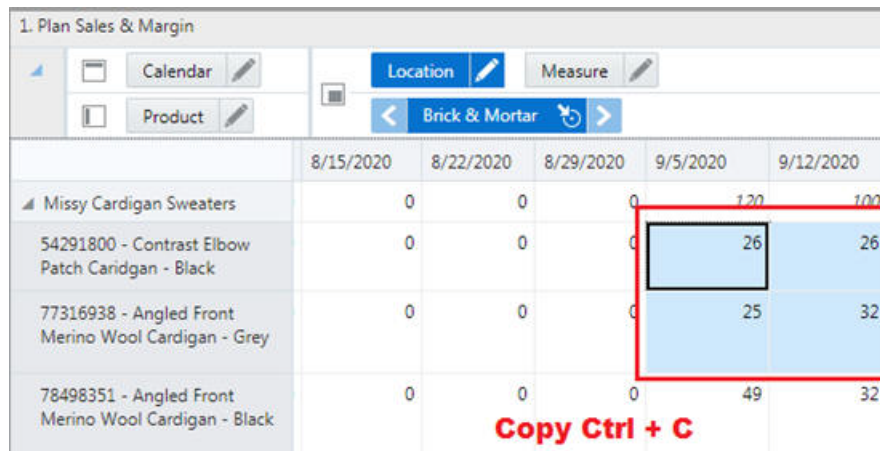
application such as Excel. It also helps you to transfer large amount of data easily. When cells are copied, only the unformatted textual content is transferred.

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



The screenshot shows a pivot table titled "1. Plan Sales & Margin". The columns represent dates: 8/15/2020, 8/22/2020, 8/29/2020, 9/5/2020, and 9/12/2020. The rows represent product categories: Missy Cardigan Sweaters, 54291800 - Contrast Elbow Patch Cardigan - Black, 77316938 - Angled Front Merino Wool Cardigan - Grey, and 78498351 - Angled Front Merino Wool Cardigan - Black. A red box highlights the cells for the dates 9/5/2020 and 9/12/2020 for the first two product categories. The values in these cells are 26, 26, 25, and 32. A red text overlay at the bottom of the table says "Copy Ctrl + C".

| | 8/15/2020 | 8/22/2020 | 8/29/2020 | 9/5/2020 | 9/12/2020 |
|--|-----------|-----------|-----------|----------|-----------|
| Missy Cardigan Sweaters | 0 | 0 | 0 | 120 | 100 |
| 54291800 - Contrast Elbow Patch Cardigan - Black | 0 | 0 | 0 | 26 | 26 |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 0 | 0 | 0 | 25 | 32 |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 0 | 0 | 0 | 49 | 32 |

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

1. Plan Sales & Margin

Calendar Location Measure

Product Brick & Mortar

| | 8/15/2020 | 8/22/2020 | 8/29/2020 | 9/5/2020 | 9/12/2020 |
|--|-----------|-----------|-----------|----------|-----------|
| Missy Cardigan Sweaters | 0 | 0 | 0 | 120 | 100 |
| 54291800 - Contrast Elbow Patch Cardigan - Black | 0 | 0 | 0 | 26 | 26 |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 0 | 0 | 0 | 25 | 32 |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 0 | 0 | 0 | 49 | 32 |

Paste Here Ctrl + V

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

Figure 4–40 Paste Data

1. Plan Sales & Margin

Calendar Location Measure

Product Brick & Mortar

| | 8/15/2020 | 8/22/2020 | 8/29/2020 | 9/5/2020 | 9/12/2020 |
|--|-----------|-----------|-----------|----------|-----------|
| Missy Cardigan Sweaters | 0 | 0 | 0 | 120 | 100 |
| 54291800 - Contrast Elbow Patch Cardigan - Black | 26 | 26 | 0 | 26 | 26 |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 25 | 32 | 0 | 25 | 32 |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 0 | 0 | 0 | 49 | 32 |

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

| | AP CP Assorted Item | WP Assorted Item | WP Flow Label | Start Week | End Week | WP Seed Sales | WP Seed Sales Source |
|--|-------------------------------------|-------------------------------------|---------------|------------|----------|--------------------------|-----------------------------|
| Missy Cardigan Sweaters | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | flow1 | 8/8/2 | 1/30/2 | <input type="checkbox"/> | Target Using |
| 54291800 - Contrast Elbow Patch Cardigan - Black | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | flow1 | 8/8/2 | 1/30/2 | <input type="checkbox"/> | Target Using Selected Curve |
| 63214451 - Waffle Knit Shawl Collar Cardigan - Black | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | flow1 | 8/8/2 | 1/30/2 | <input type="checkbox"/> | |
| 65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather | <input type="checkbox"/> | <input type="checkbox"/> | flow1 | | | <input type="checkbox"/> | |
| 70063172 - Merino Wool Flutter Cardigan - Black | <input type="checkbox"/> | <input type="checkbox"/> | flow1 | | | <input type="checkbox"/> | |
| 72939751 - Merino Wool Flutter Cardigan - China Red | <input type="checkbox"/> | <input type="checkbox"/> | flow2 | | | <input type="checkbox"/> | |

Workspace Operations

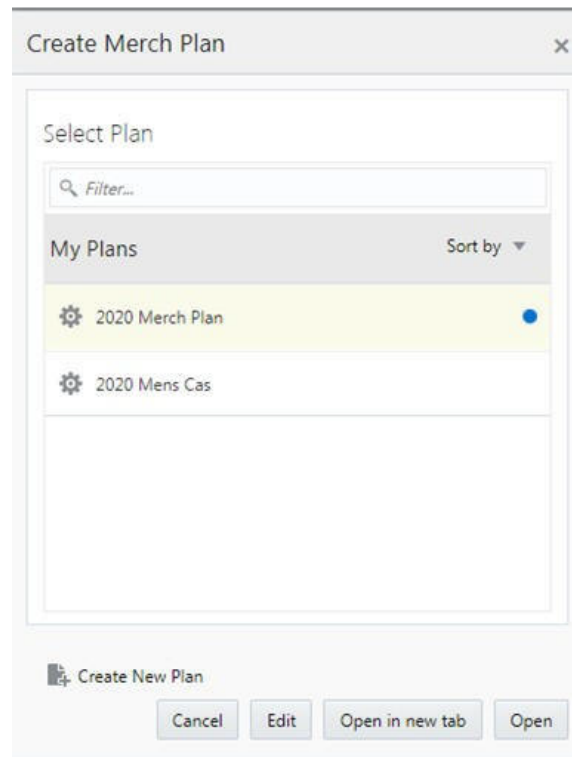
The majority of the work you perform within the application occurs within a personal workspace built around a segment. These workspaces are constructed by creating a copy of the subset of the application's data described by the segment and are, therefore, to a degree, independent from the domain and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

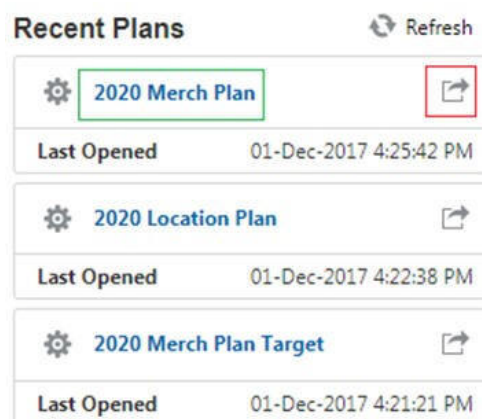
However, the use of workspaces by the application introduces the need to manage the flow of data between the domain and the workspace through a number of workspace operations. This section describes the operations you can perform on workspaces.

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

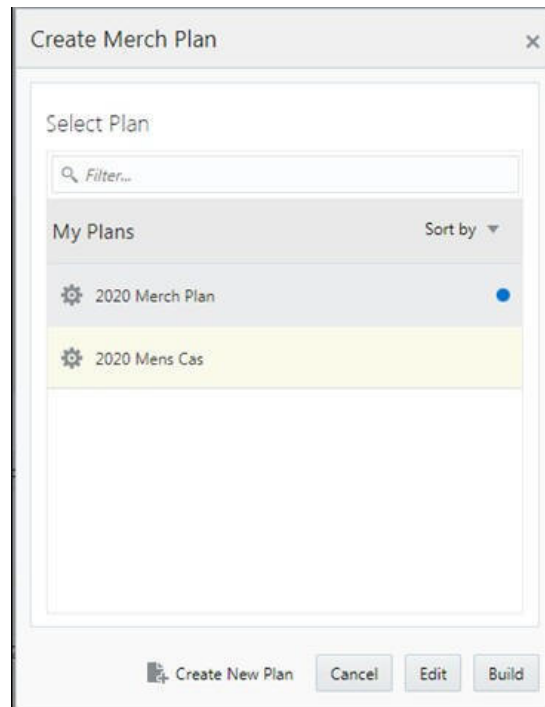
Because the 2020 Merch Plan workspace has been recently used, it is also present within the Recent Plans section of the dashboard. Click the link highlighted in green to open the segment workspace in current application browser tab. Click on the link highlighted in red to open it in separate browser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

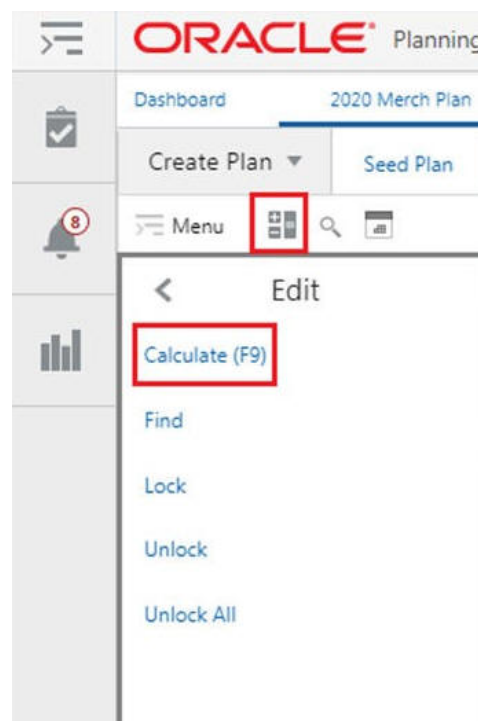
Second, the business logic defining how values in the workspace will update based upon an edit is sophisticated enough to be able to choose between multiple ways of updating the workspace data for a set of edits or combination of edits and cell locking, depending on which measures have been edited or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

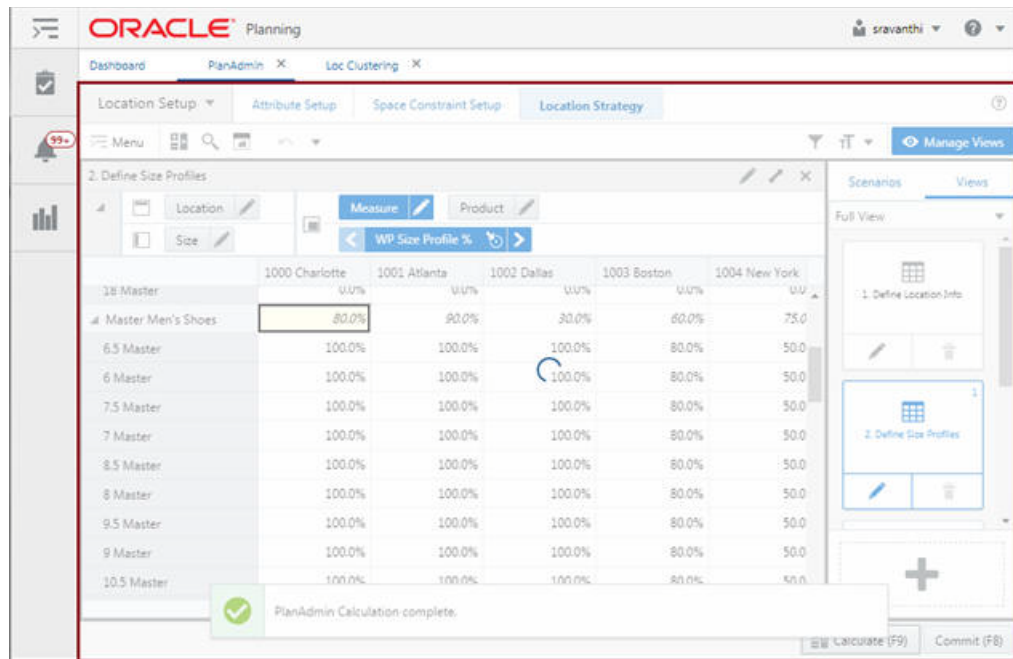
Figure 4–45 Calculate Workspace



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

When you perform a long running calculate operation, the partial refresh of the pivot table during the operation allows you to continue to see the grid data during the calculate processing, so that you can continue your analysis. However, you cannot interact with any of the menus or buttons, edit data, or scroll through the grid while the calculate operation is in progress. You can switch workspace tabs to continue working on other workspaces and you can access the left sidebar Menu (Tasks, Notifications, Reports).

As seen in [Figure 4–46](#), you cannot interact with the area indicated by the red box. Outside of it, you can continue with your work.

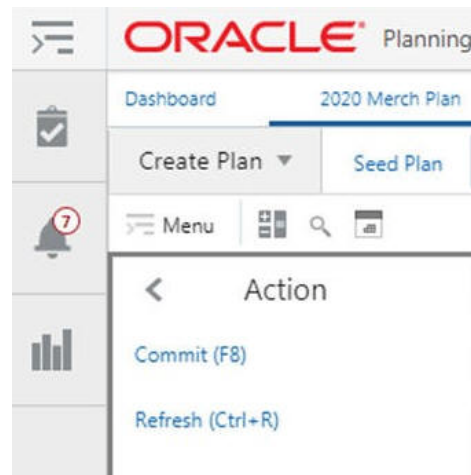
Figure 4–46 Partial Refresh During Calculation

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.

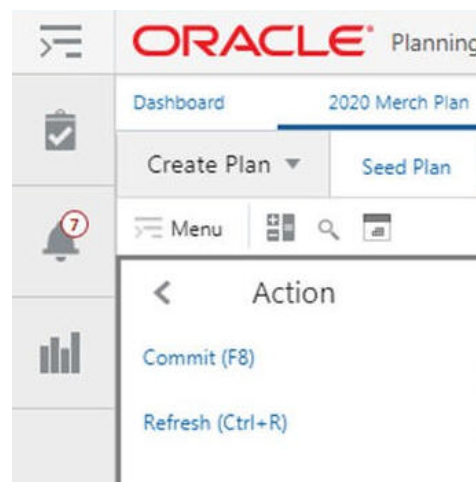
Note that some workspaces, mainly those associated with some administrative activities, do not define a refresh rule group and, therefore, cannot be refreshed.

Figure 4–47 Refresh Workspaces

Committing Workspaces

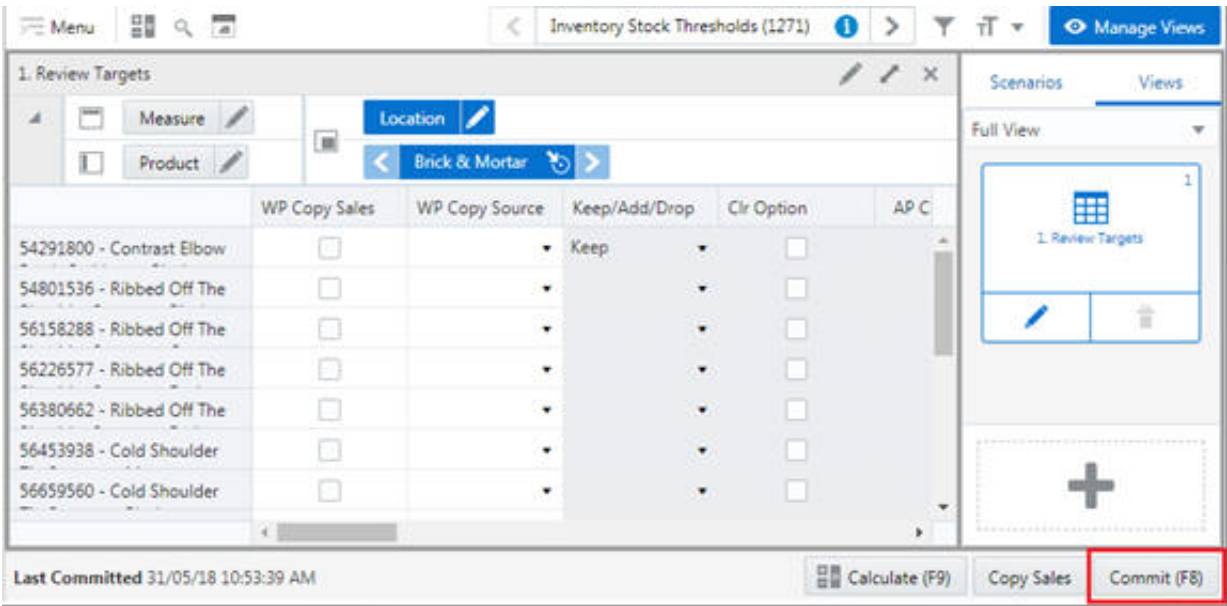
Once a workspace has been built for a segment, all work performed is saved within that workspace. All edits, calculations, and actions are saved within the workspace sandbox but are reflected outside of the workspace. In order for the changes made within the workspace to be available to be an input to 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 4–48 Commit Workspace

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

Figure 4–49 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 4–50 Commit Notifications

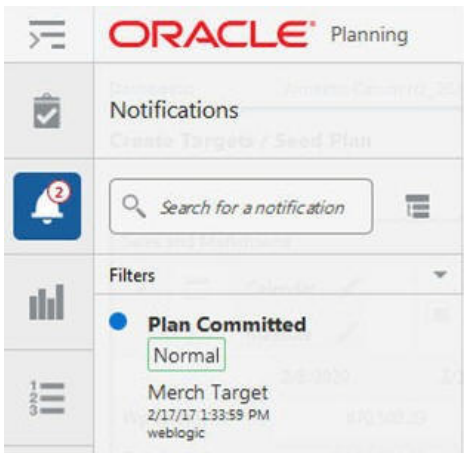


Figure 4–50 shows an example of the notification received at the conclusion of a segment workspace commit.

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 4–51 Close the Workspace

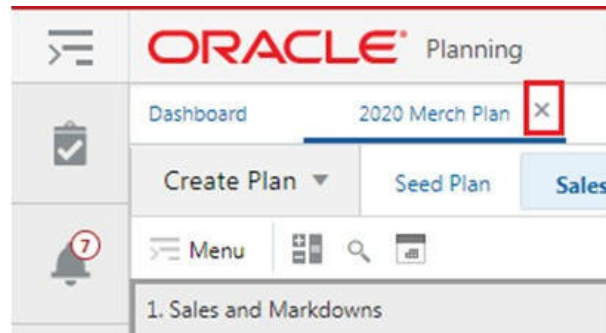


Figure 4–51 shows the application tab for the open 2020 Merch Plan segment workspace. Click the X icon on the tab to save any outstanding edits and close the workspace.

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.

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

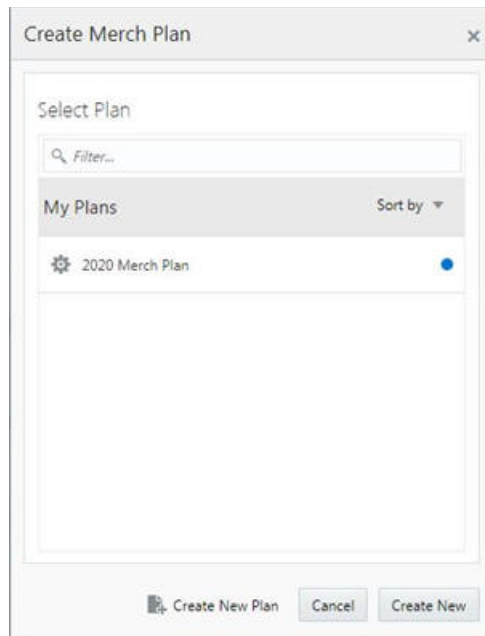
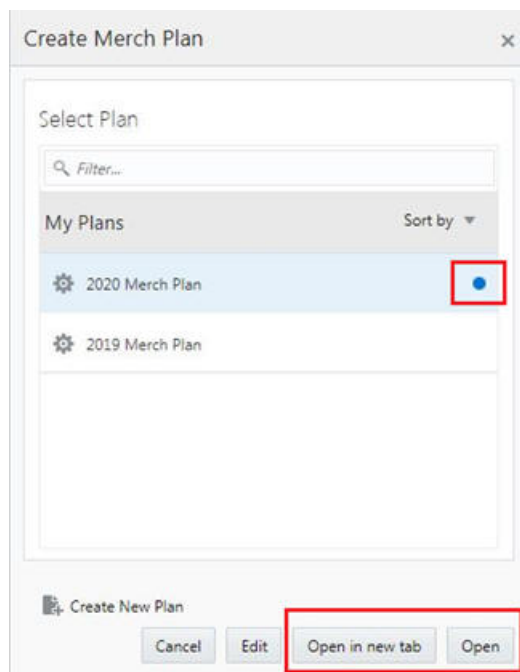
Figure 5–1 Segment Dialog Box

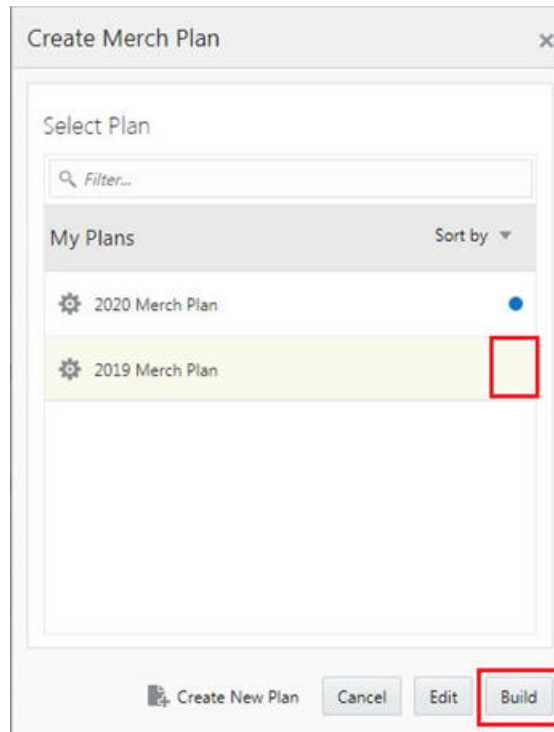
Figure 5–1 shows the segments that are already defined. You can create a new segment at any time by selecting the link in the lower left hand corner, or, when nothing is selected, by clicking **Create New** in the lower right.

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.

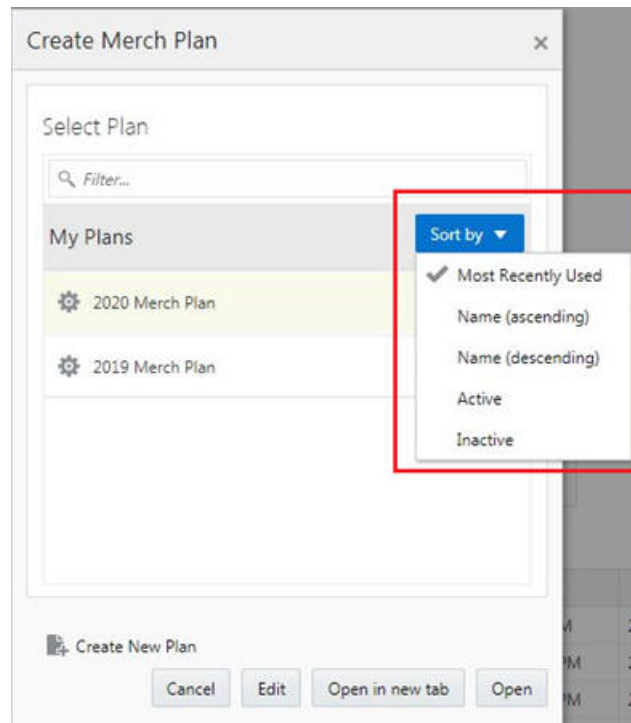
Figure 5–2 Pre-Season Planning Active Segment

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



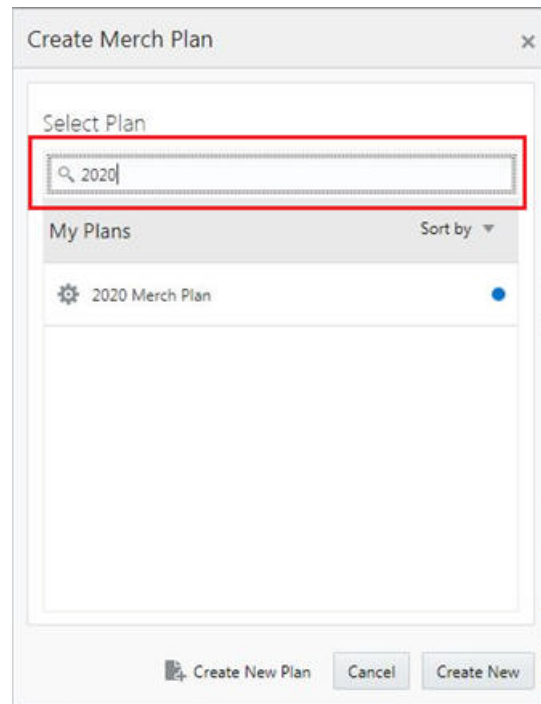
In order to find a particular segment, you can sort and filter the segment entries. To sort the entries, select an option in the Sort by drop-down list.

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.

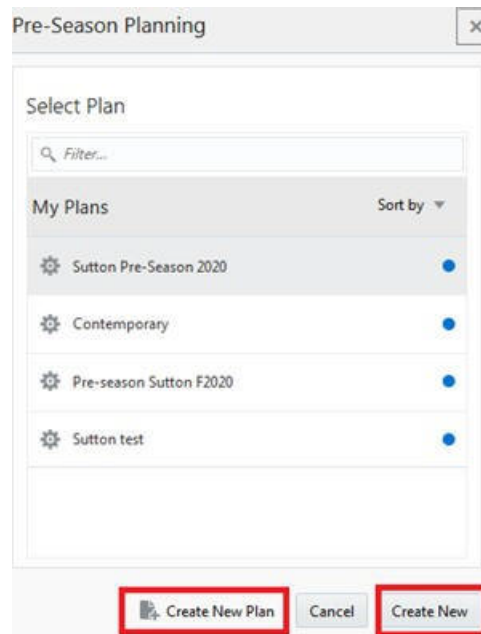
To filter for a particular segment, type text into the filter box. In the Pre-Season Planning Filter, a single letter, s, has been entered in [Figure 5–5](#). The list of segments displayed include only those with an s in the labels.

Figure 5–5 Pre-Season Planning Filter

Creating a New Segment

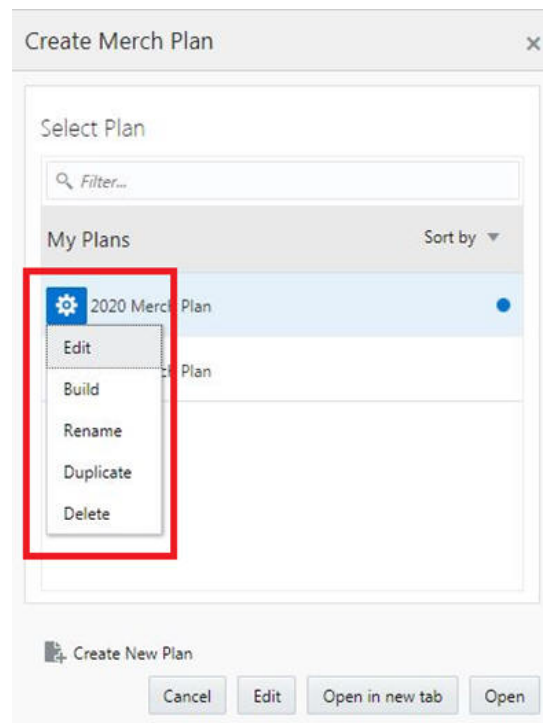
A new segment can be created either with the Create New link in the lower left, or, when no segments are selected, by using the Create New button. In either case you are prompted for a label for that segment, and then taken into the wizard (see [Wizards](#)).

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

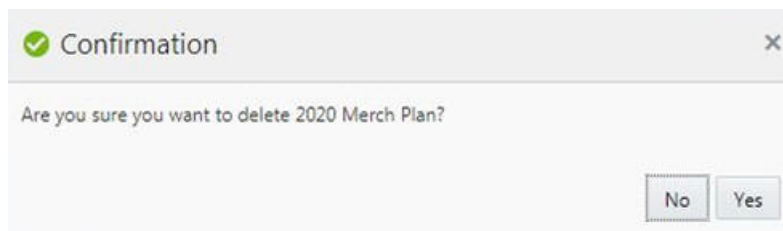
In order to take action on a segment, click the **Action Menu** icon next to the segment. A context menu appears, with four options: Edit, Build, Rename, Duplicate, and Delete.

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

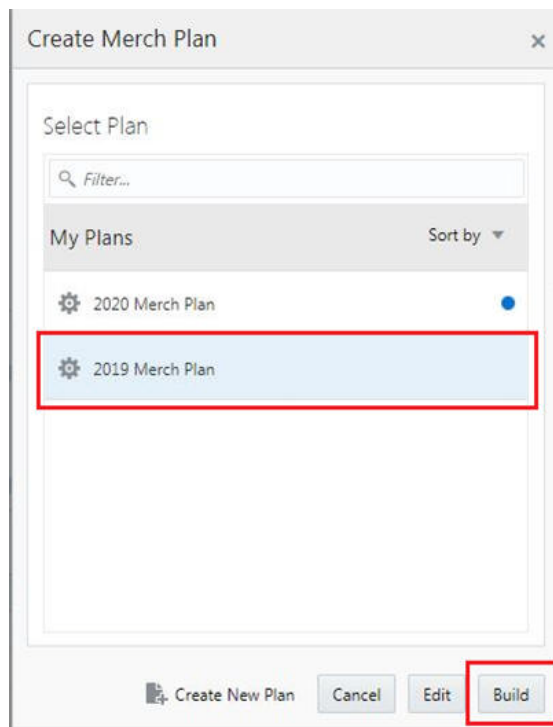
Building a Segment

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](#)).

Note that once the segment is submitted for building, the segment is locked until the operation is completed. If any of the operations on the segment, such as open, edit, delete, build, or rename, are performed, then all of them will fail and an error similar to the following will be displayed.

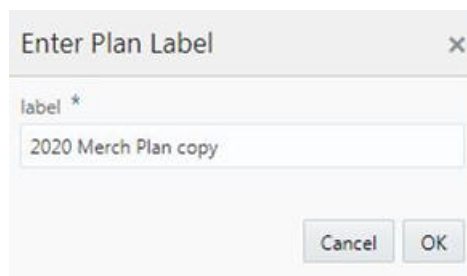
""Create Assortment Missy2019' is being re-created and cannot be edited during this time. Try again in a few minutes, or check notifications to see when it can be edited again. If the problem persists, contact your administrator."

Users are generally notified about the segment build status in the notification. If the status has a value of Failed, contact the application administrator who can view the online administration task log files to determine the cause of the failure. Usually, the segment build process completes within a specified time with the arrival of the notification. If the user does not receive the notification within 24 hours, then the segments will be unlocked automatically.

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*

Create Merch Plan: 2020 Merch Plan

Select Calendar

Levels & Positions

Year View Search...

| Level | Label |
|-------------------------------------|--------------|
| <input checked="" type="checkbox"/> | Half1 FY2018 |
| <input type="checkbox"/> | Half2 FY2018 |
| <input type="checkbox"/> | Half1 FY2019 |
| <input checked="" type="checkbox"/> | Half2 FY2019 |
| <input checked="" type="checkbox"/> | Half1 FY2020 |
| <input checked="" type="checkbox"/> | Half2 FY2020 |
| <input checked="" type="checkbox"/> | Half1 FY2021 |
| <input type="checkbox"/> | Half2 FY2021 |

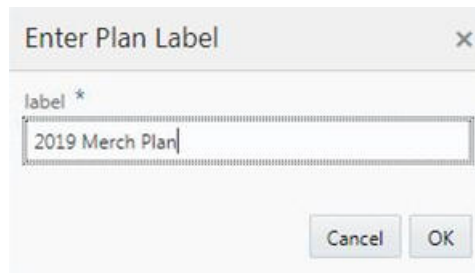
Cancel < Previous Next > Finish

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.

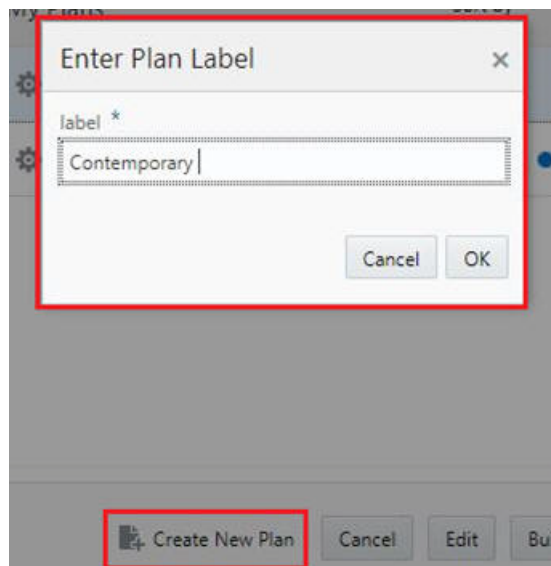
Figure 5–12 Renaming a Segment

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 Create New Plan Wizard

Level and Position Selector

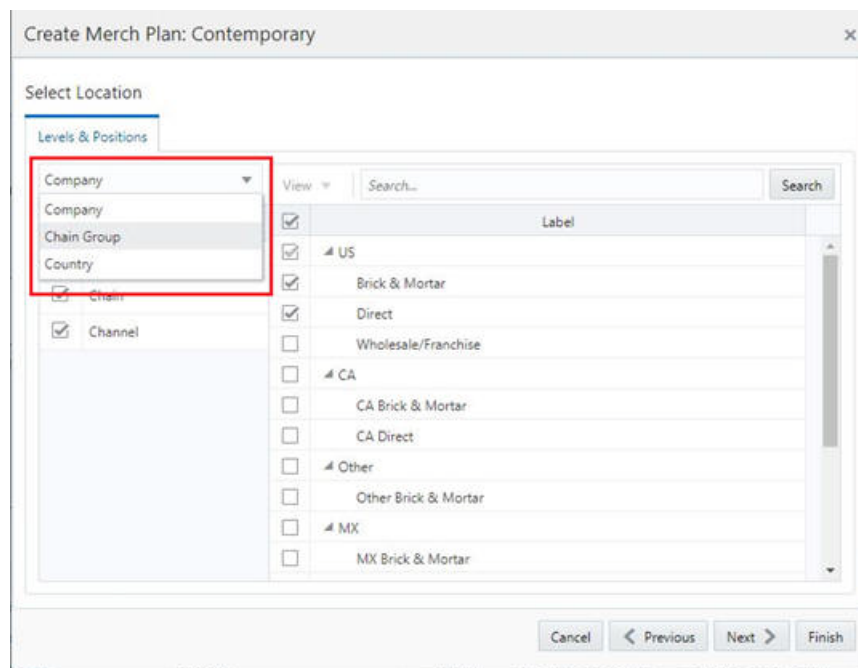
To select a level or position, complete the following steps.

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.

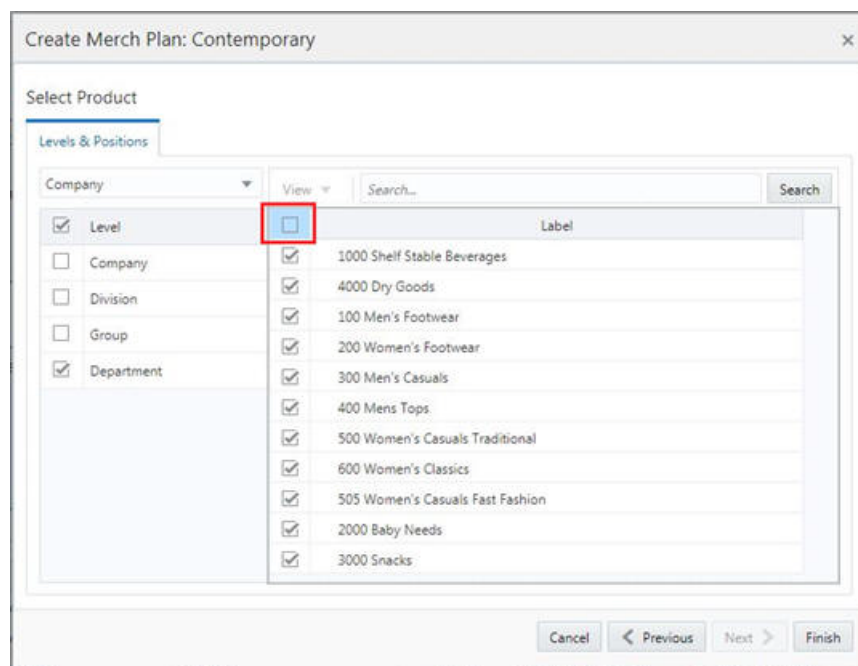
Note that if you select a large number of positions, it may impact the time required for the workspace to open. Select only the positions required for the current task.

Figure 5–14 Select Positions

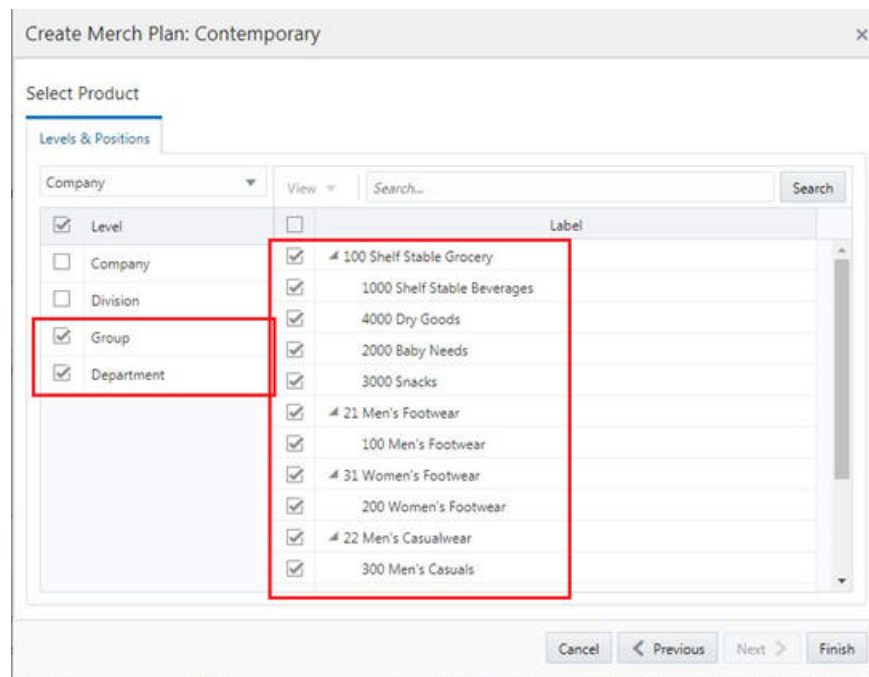


2. To select all positions, click the top of the column next to all the positions.

Figure 5–15 Select All Positions

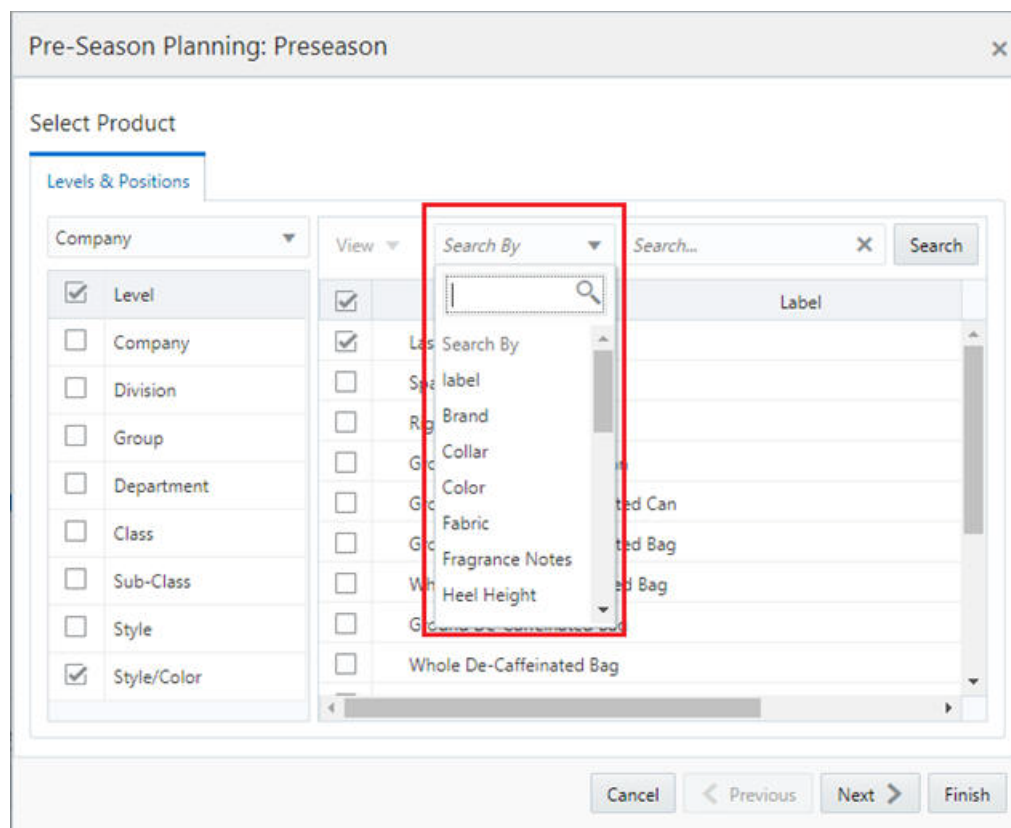


3. To change the level of the positions to select from, place a check next to the desired level in the top left of the screen.

Figure 5–16 Change Position Levels

Filter Position by Attribute

You can filter the positions by attributes when you create your plan. This allows you to examine the different options that you care about and make decisions. The attribute filter is visible only when attributes are associated with at least one of the selected levels. The filter picklist is by default set to the label attribute.

Figure 5–17 Filter Position by Attributes

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 5–18 Next Dimension

Create Merch Plan: Contemporary

Select Location

Levels & Positions

Company: US View: Search... Search

| Level | Label |
|-------------------------------------|----------------------|
| <input checked="" type="checkbox"/> | US |
| <input checked="" type="checkbox"/> | Brick & Mortar |
| <input checked="" type="checkbox"/> | Direct |
| <input type="checkbox"/> | Wholesale/Franchise |
| <input type="checkbox"/> | CA |
| <input type="checkbox"/> | CA Brick & Mortar |
| <input type="checkbox"/> | CA Direct |
| <input type="checkbox"/> | Other |
| <input type="checkbox"/> | Other Brick & Mortar |
| <input type="checkbox"/> | MX |
| <input type="checkbox"/> | MX Brick & Mortar |

Cancel < Previous **Next >** Finish

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 Toast notification. You can also see the status at the bottom of the Administration Dashboard.

Figure 5–19 Asynchronous Build

wendy ?

Preseason Planning is being prepared. You will receive a notification when this is complete.

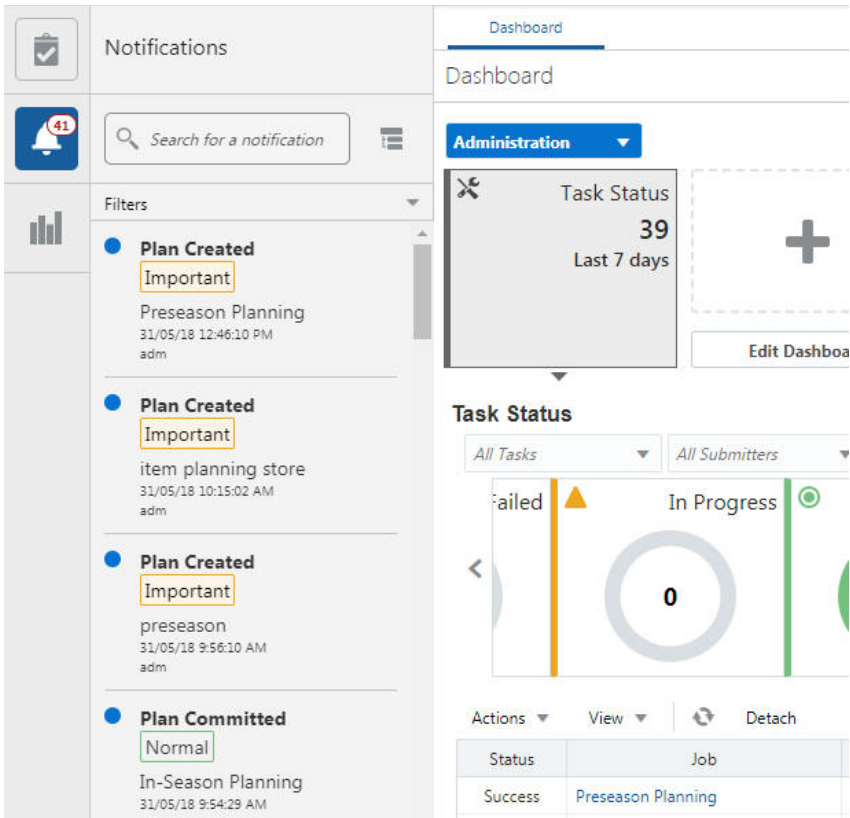
Recent Plans

| | |
|---------------------|-------------------------------------|
| Preseason Test | Last Opened 31-May-2018 1:07:20 PM |
| Assortment Strategy | Last Opened 31-May-2018 1:02:20 PM |
| Inseason | Last Opened 31-May-2018 12:05:21 PM |

Last 7 days

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

Figure 5–20 Asynchronous Build Notification



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 or a Toast notification at the top right of the screen when the activity status has updated for a 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

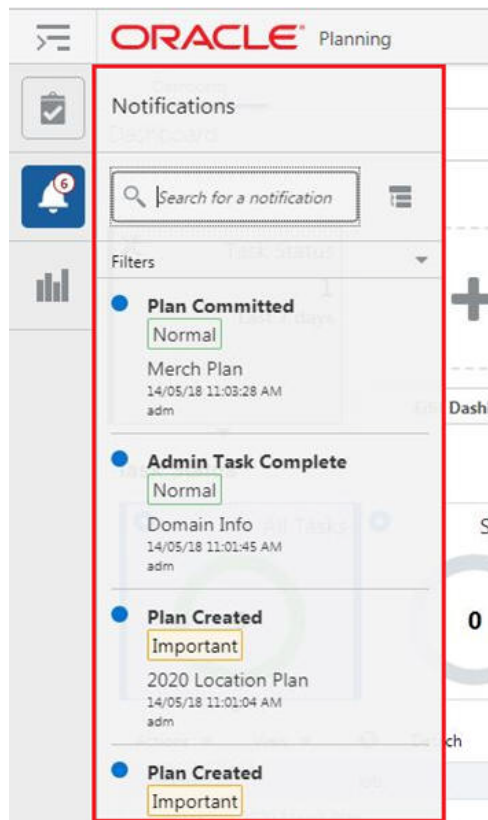
Table 6–1 Notification Severity

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

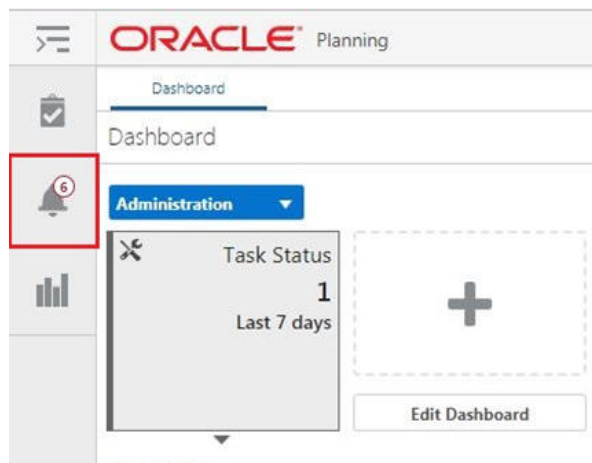
Notifications Panel

To view the Notifications panel:

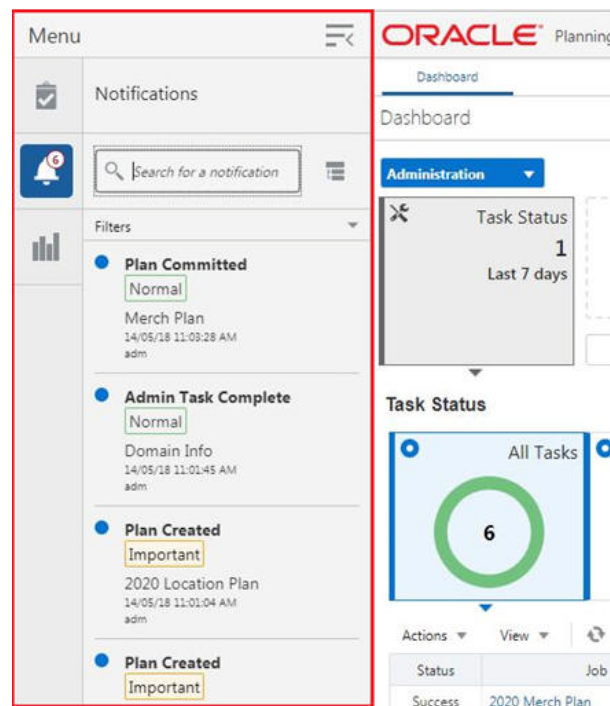
1. Click **Notifications** on the left sidebar menu.

Figure 6–1 Notifications

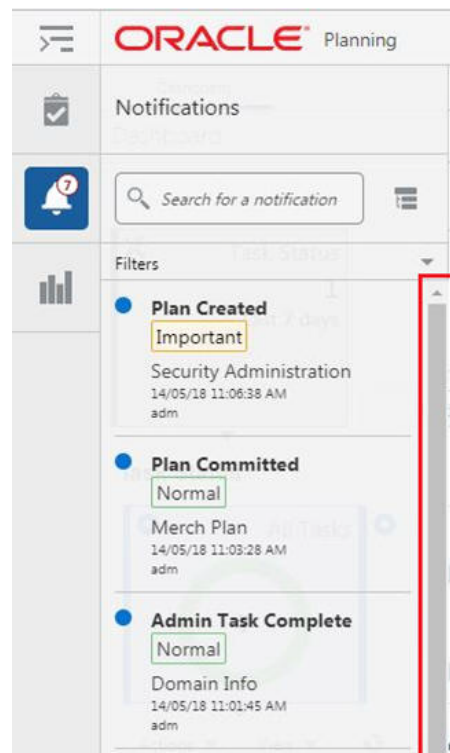
2. You can click on either the notifications icon to open the notifications dialog box. If launched this way, it partially covers the current workspace that you are viewing.

Figure 6–2 Notification Icon

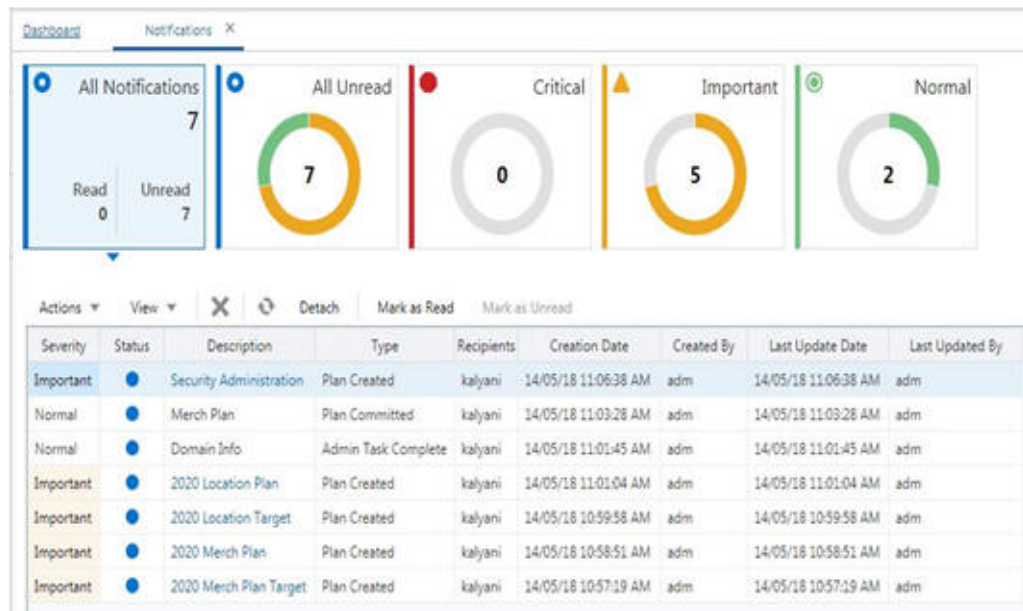
3. If you want to continue with the work in the current workspace and simultaneously launch the Notifications panel, click **Menu**, which launches the notifications list by moving the current workspace.

Figure 6–3 Notification Via Menu

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

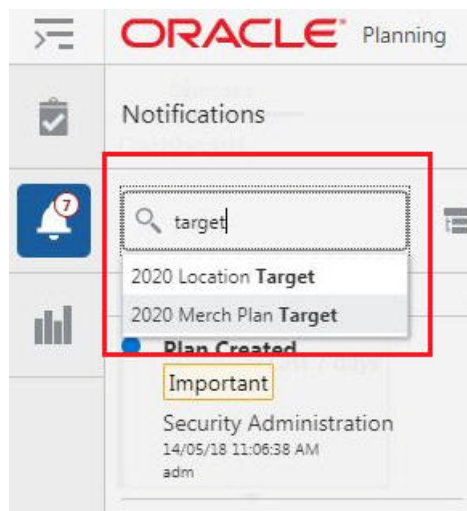
Figure 6–4 Notifications Scroll Bar

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

Figure 6–5 Notifications Tab

Searching for Notifications

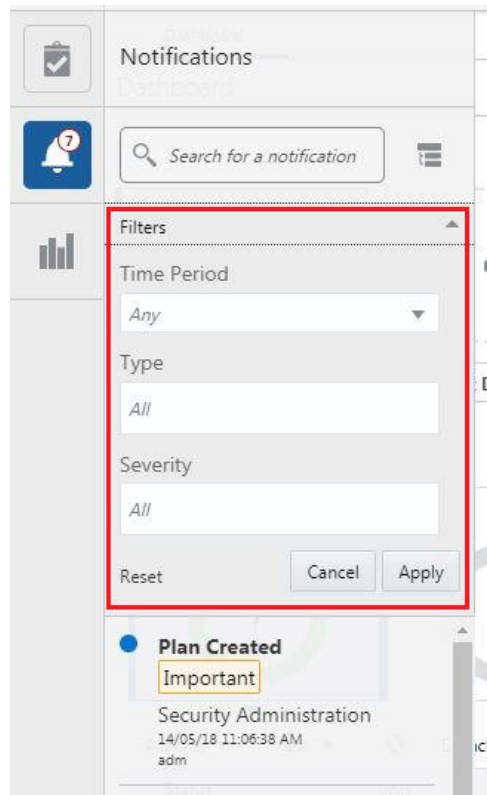
To search for a specific notification, enter a search term in the Search box.

Figure 6–6 Searching for Notifications

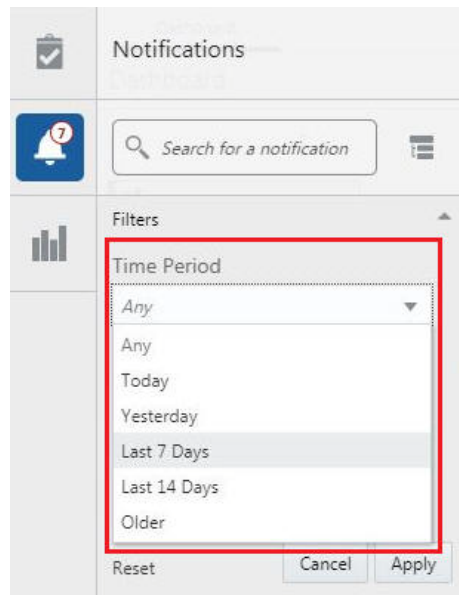
Filtering Notifications

To filter notifications:

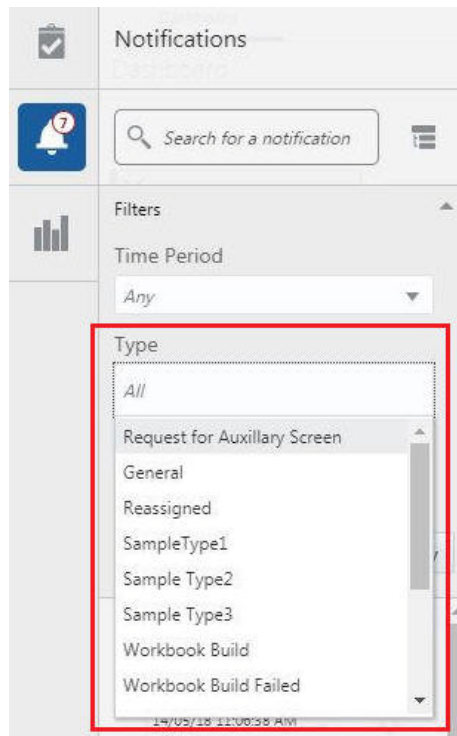
1. Once in the Notifications Module, click the **Filters** drop-down list to see the list of available filters. You can filter by Time Period, Type, and Severity. You can also click **Reset** to clear all filters, or click **Apply** to apply the filters.

Figure 6–7 Notifications Filter Options

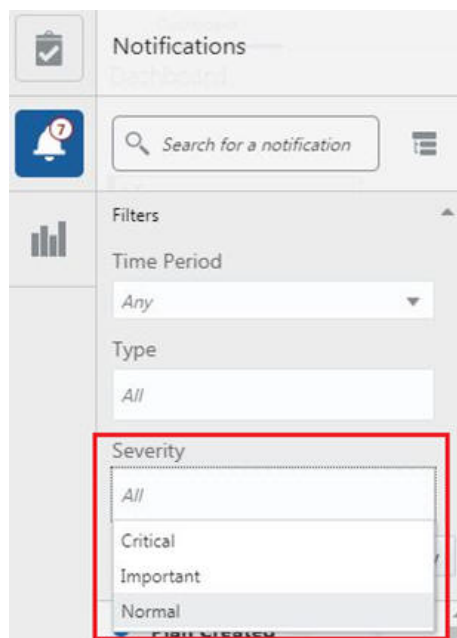
2. Provide values for Time Period, Type, and Severity in the Time Period filter.

Figure 6–8 Notifications Time Period Filter Options

3. Select a Type filter option.

Figure 6–9 Notifications Type Filter Options

4. Select a Severity filter option.

Figure 6–10 Notifications Severity Filter Options

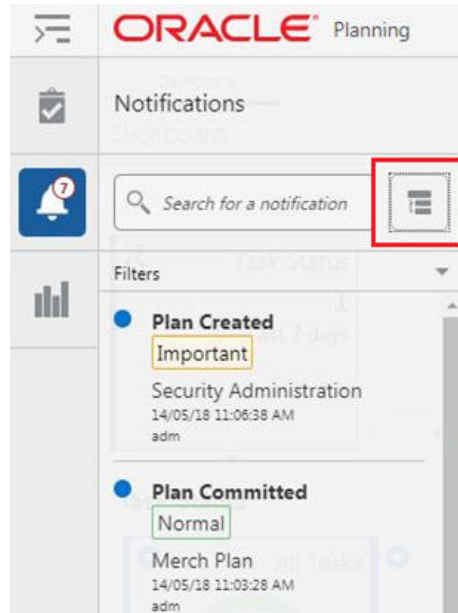
5. After you have selected the filter options, you can use **Reset** to clear the filter options, **OK** to apply the filter criteria and close the options selector, or **Cancel** to close the options selector without applying the filters.

Group Notifications

To define group notifications, complete the following steps:

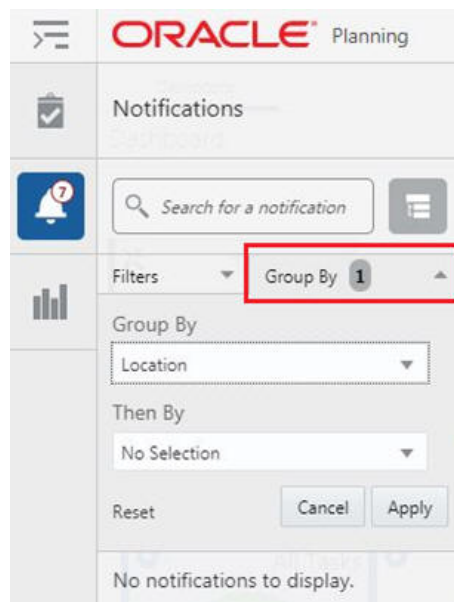
1. To open the Group By dialog box, click **Group View** from the Notifications module.

Figure 6–11 Notifications Group View



You can view the Group By next to the filters.

Figure 6–12 Notifications View Group By Location



2. To group by type, use the options Department, Class, Subclass, Location, Supplier, Performance, Brand, Rollup Count. and Additional Information.

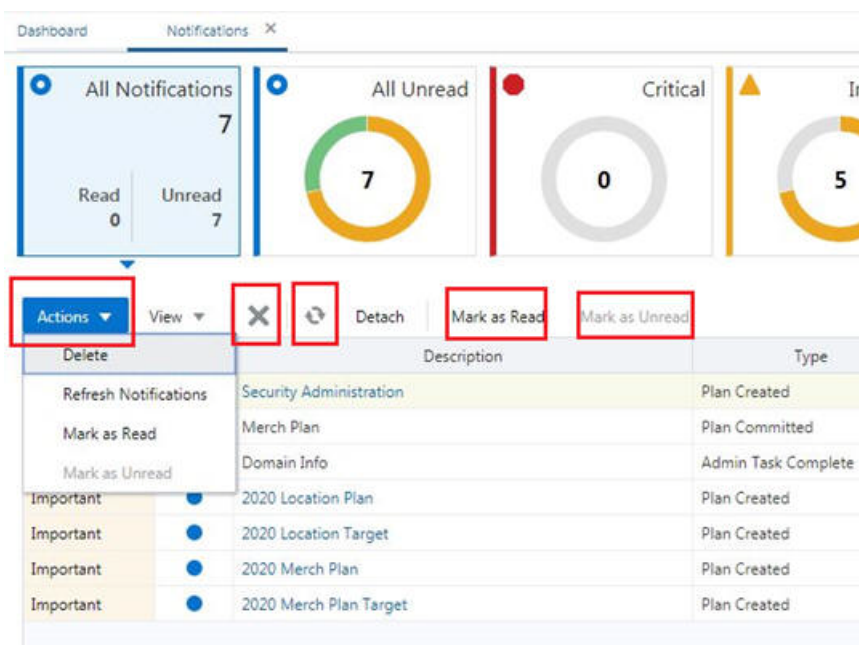
3. To group by then by, use the options No Selection, Department, Class, Subclass, Location, Supplier, Performance, Brand, Rollup Count, and Additional Information.

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.

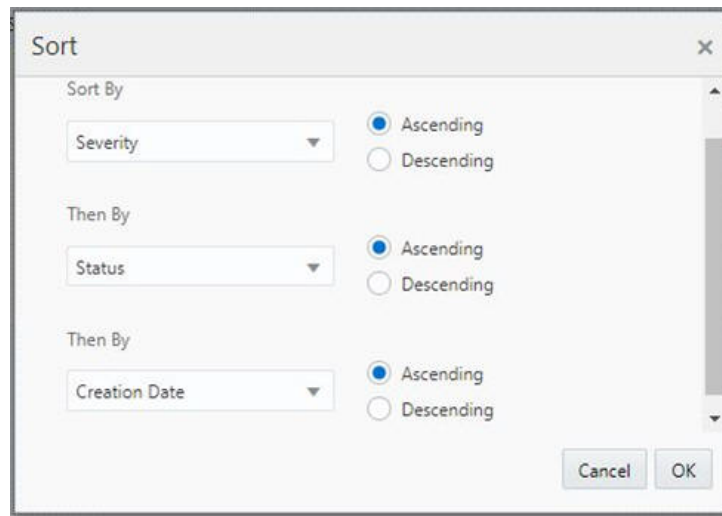
The actions that can be performed on the list of Notifications are Mark a notification as Read, Mark a Notification as Unread, Delete a Notification, and Refresh the Notifications list. You can perform these actions either by clicking the **Actions** menu and then the desired event or by directly clicking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

Figure 6–13 Notifications Tab List of 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 Dialog Box

Snackbar and Toast Notifications

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

Table 6–2 Snackbar and Toast 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. |

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

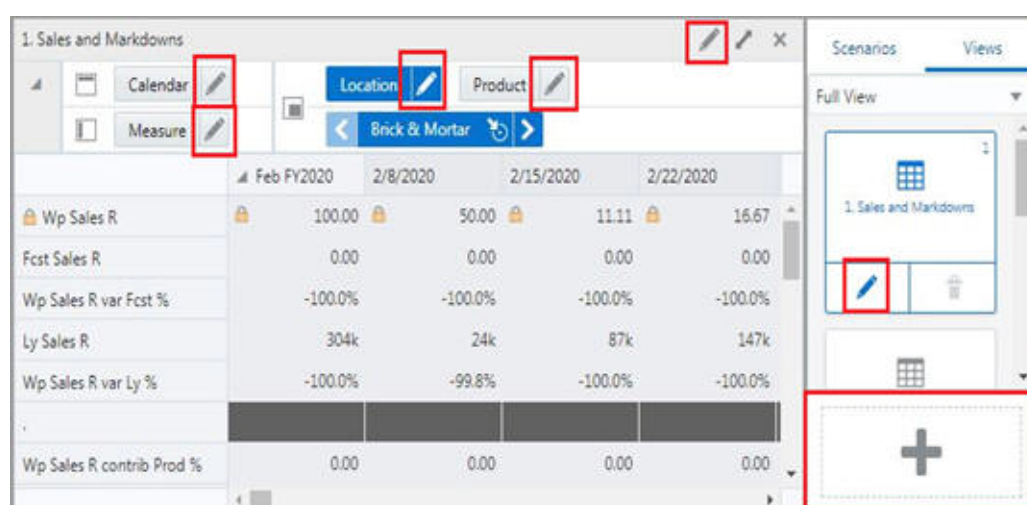


Figure 7–2 Launching Edit View from the Detach View

1. Sales and Markdowns (Detached View)

Menu

Calendar Location Product Measure

Brick & Mortar

| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 | 2/29/2020 | Mar FY2020 | 3/7/ |
|---------------------------|------------|----------|-----------|-----------|-----------|------------|------|
| Wp Sales R | 100.00 | 50.00 | 11.11 | 16.67 | 22.22 | 180.00 | |
| Fcst Sales R | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Wp Sales R var Fcst % | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | |
| Ly Sales R | 304k | 24k | 87k | 147k | 45k | 222k | |
| Wp Sales R var Ly % | -100.0% | -99.8% | -100.0% | -100.0% | -100.0% | -99.9% | |
| Wp Sales R contrib Prod % | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Ly Sales R contrib Prod % | 0.02 | 0.01 | 0.03 | 0.04 | 0.01 | 0.02 | |
| Ly Sales R contrib Time % | 0.06 | 0.08 | 0.29 | 0.48 | 0.15 | 0.04 | |

Calculate (F9) Seed Refresh Fulfillment Commit (F8)

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

Edit View

Setup Details

Source *

Select a source

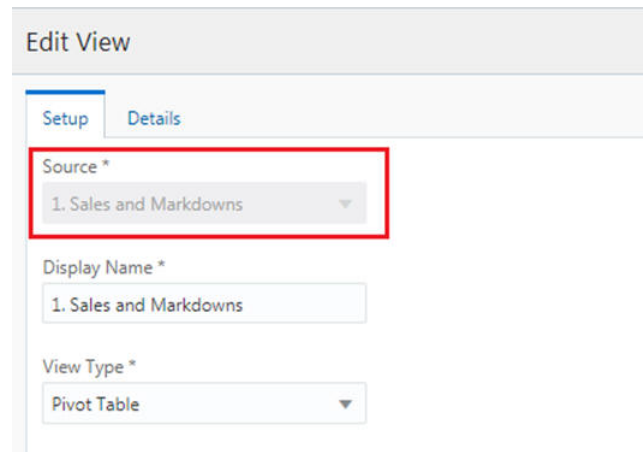
Display Name *

View Type *

Pivot Table

Any other way of launching 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*

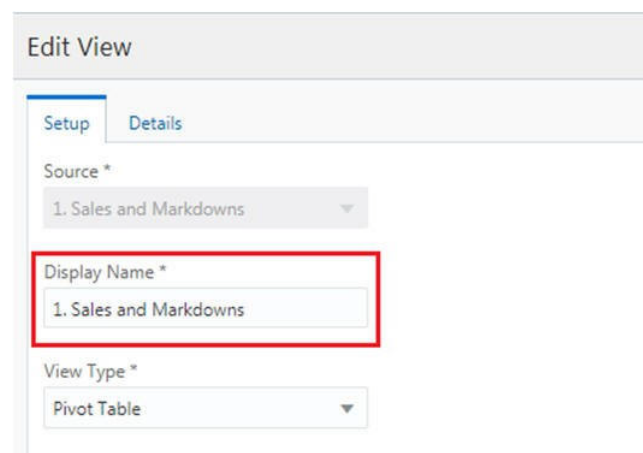


The screenshot shows the 'Edit View' dialog box with the 'Setup' tab selected. The 'Source' dropdown menu is highlighted with a red box and displays '1. Sales and Markdowns'. Below it, the 'Display Name' field also shows '1. Sales and Markdowns', and the 'View Type' dropdown shows 'Pivot Table'.

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*



The screenshot shows the 'Edit View' dialog box with the 'Setup' tab selected. The 'Display Name' text field is highlighted with a red box and contains the text '1. Sales and Markdowns'. The 'Source' dropdown above it also shows '1. Sales and Markdowns', and the 'View Type' dropdown below it shows 'Pivot Table'.

View Type

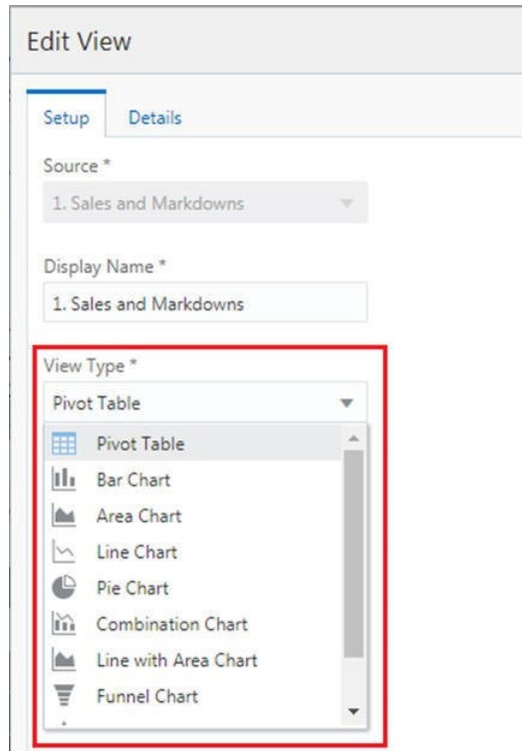
You can change the view type using the Edit View as shown [Figure 7–6](#). You must be in the Setup tab of Edit View to complete this action.

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

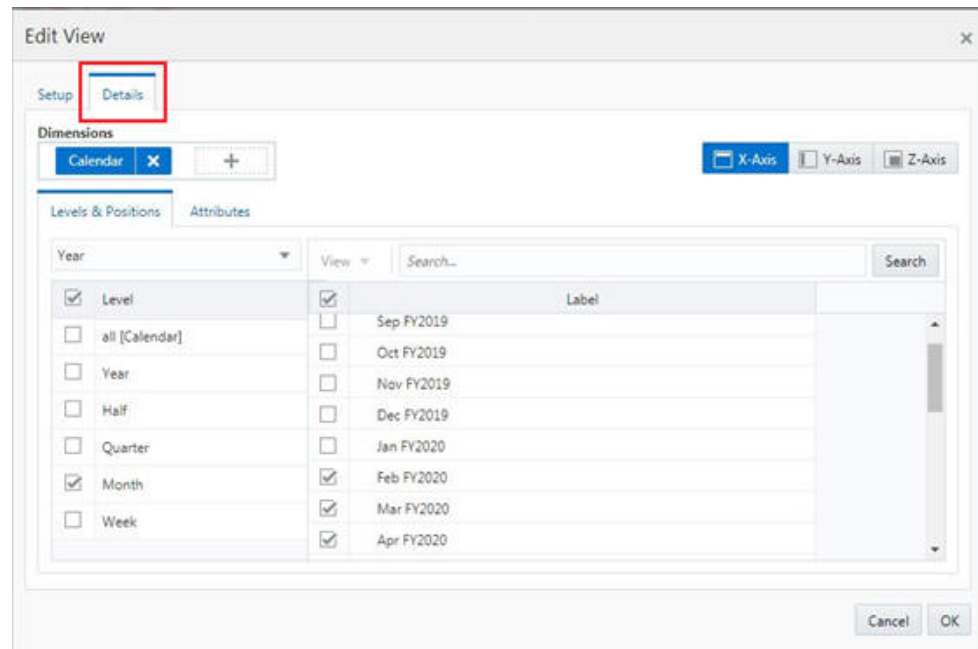


Moving and Re-Ordering Dimension Tiles

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

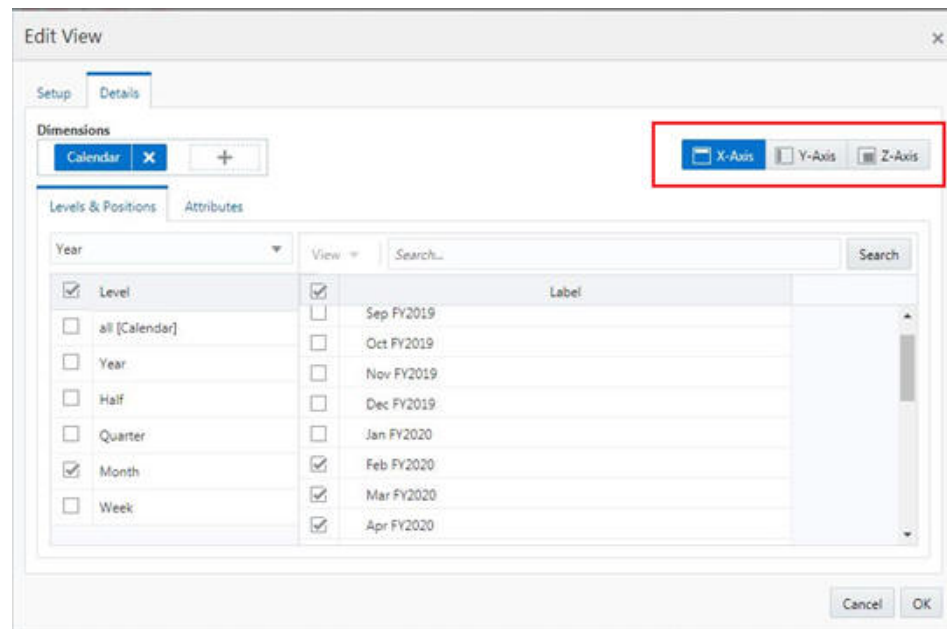
1. Once Edit View is open, click the **Details** tab to see the different dimensions, axes, levels, positions, and measures.

Figure 7–7 Edit View Details

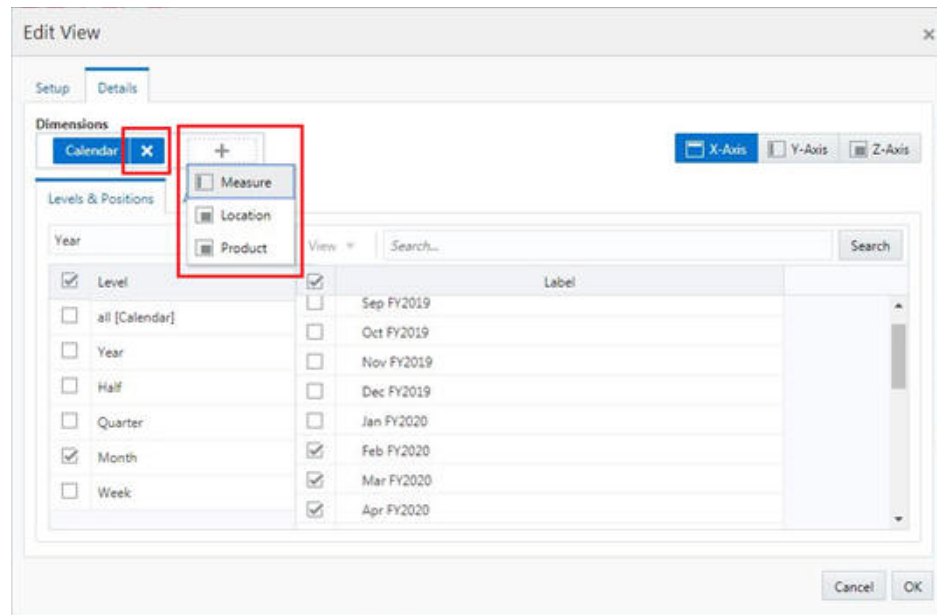


2. To view the contents of each axis, click the different **Axis Toggle** buttons in the top right.

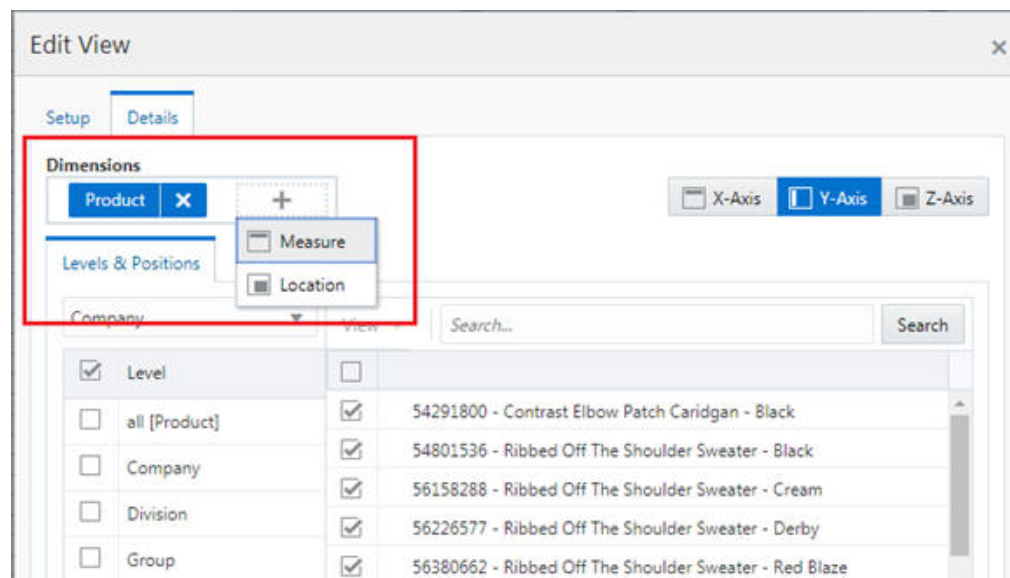
Figure 7–8 Axis Toggle Buttons



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

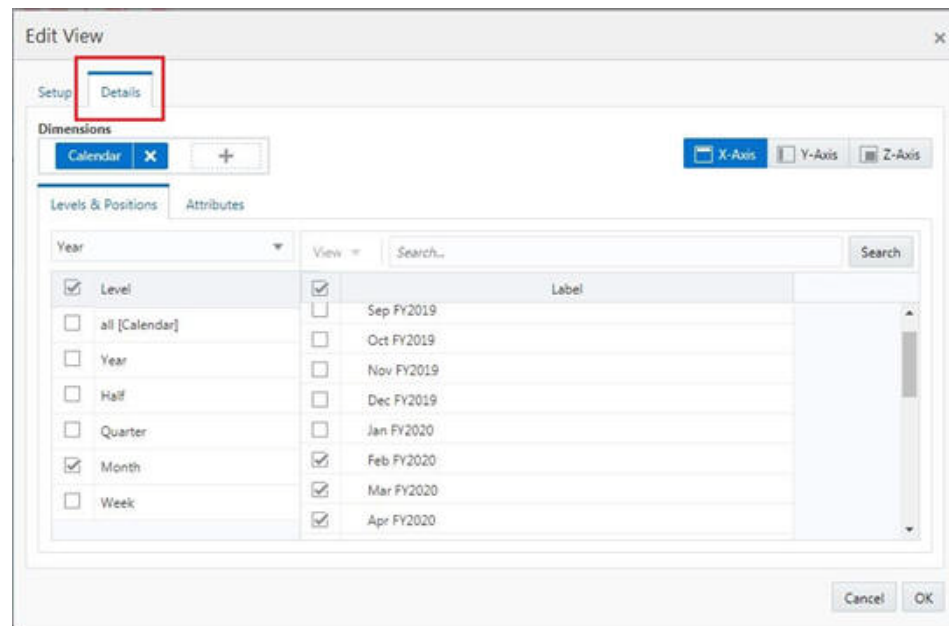
Use Edit View to change the data shown at each level in a view.

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.

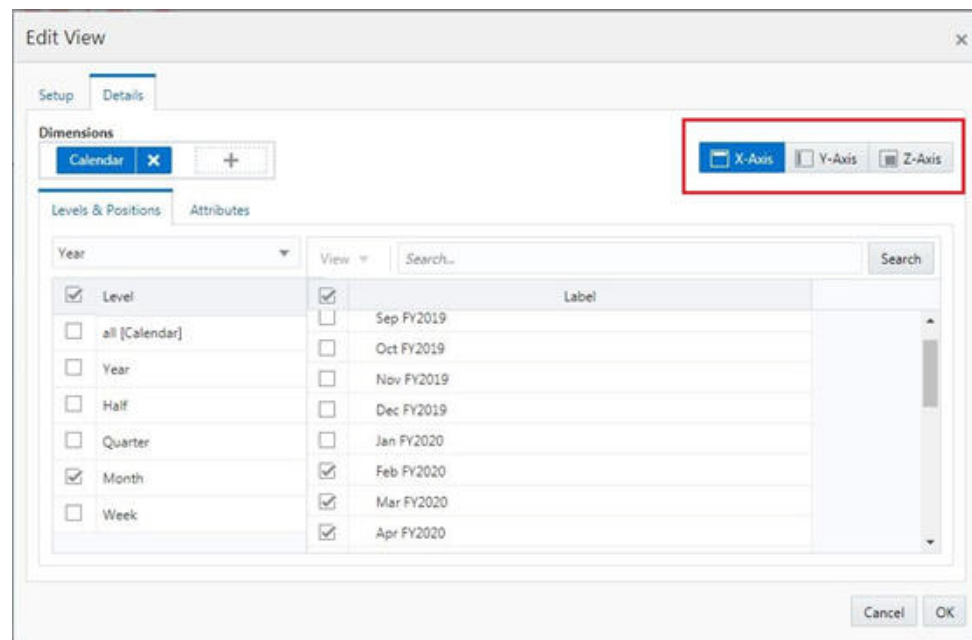
1. Once Edit View is open, click the **Details** tab to see the different dimensions, axes, levels, positions, and measures.

Figure 7–11 Open Details Tab

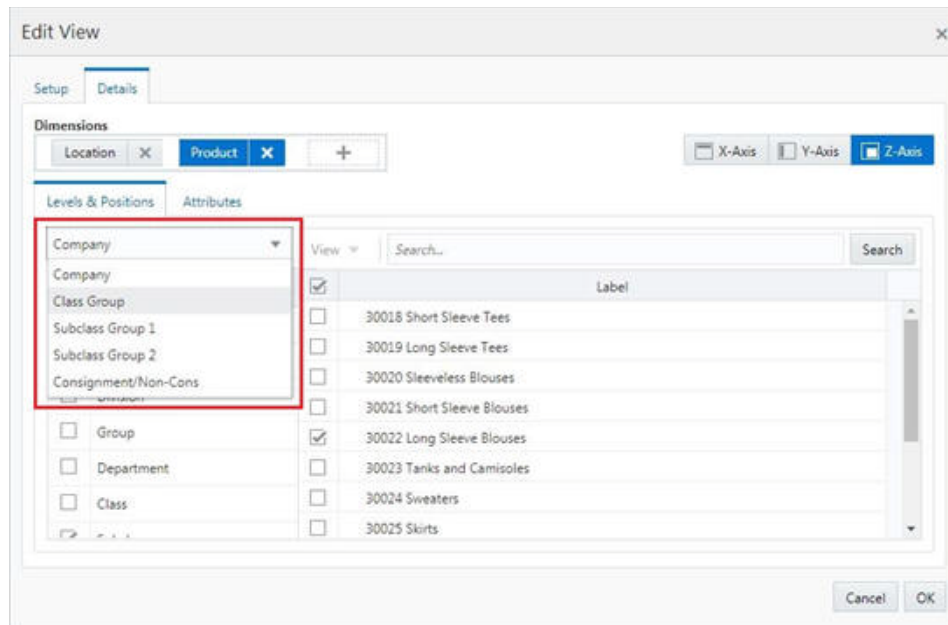


2. To view the contents of each axis, click the different **Axis Toggle** buttons in the top right.

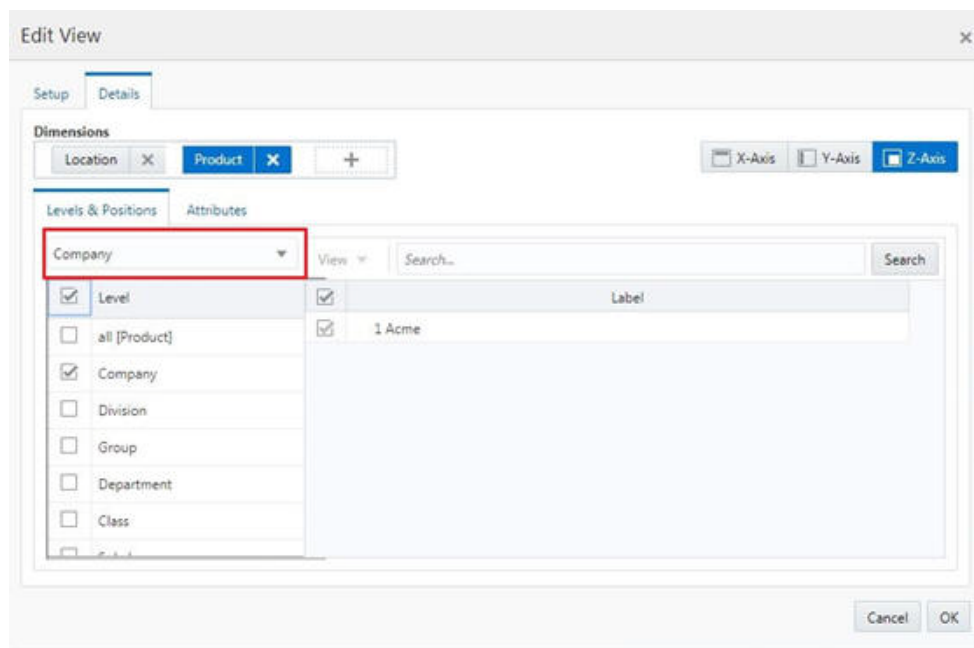
Figure 7–12 Viewing Axis Contents



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)

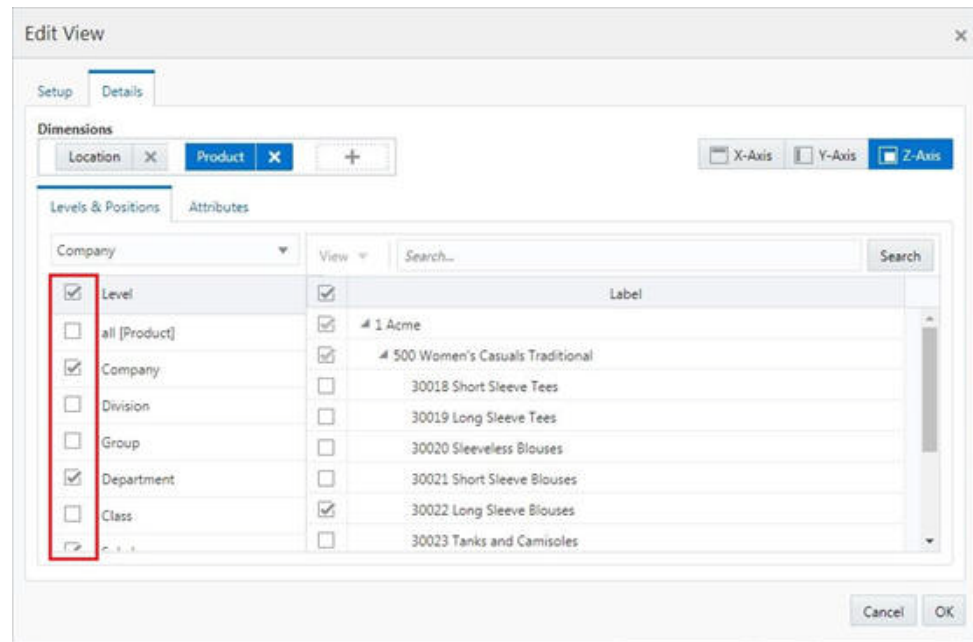
4. When you select a different branch, you see different dimension levels that you can choose from in the Levels and Positions area.

Figure 7–14 Branch Dimension Levels and Positions

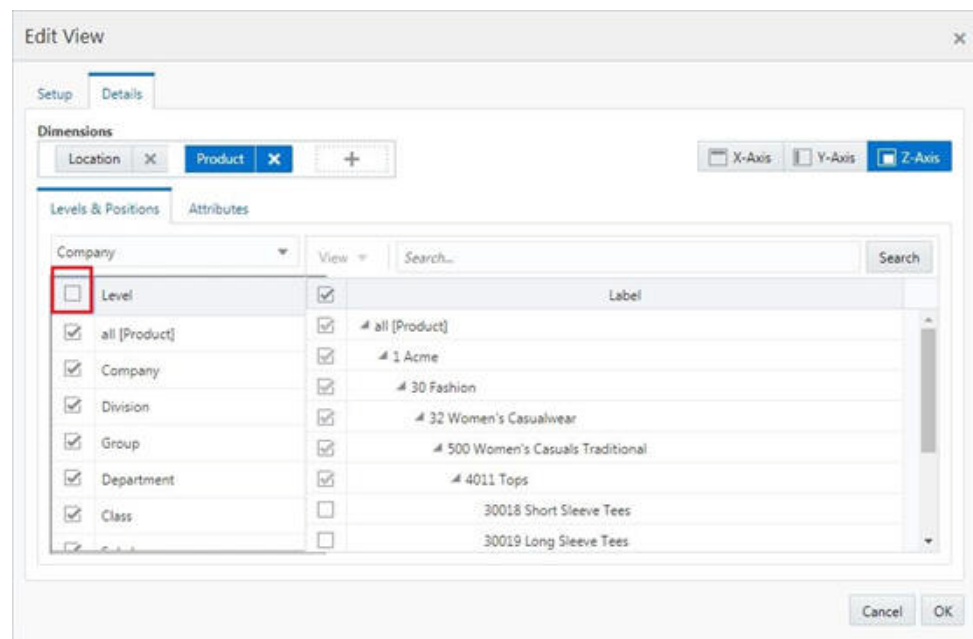
Showing and Hiding Levels

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.

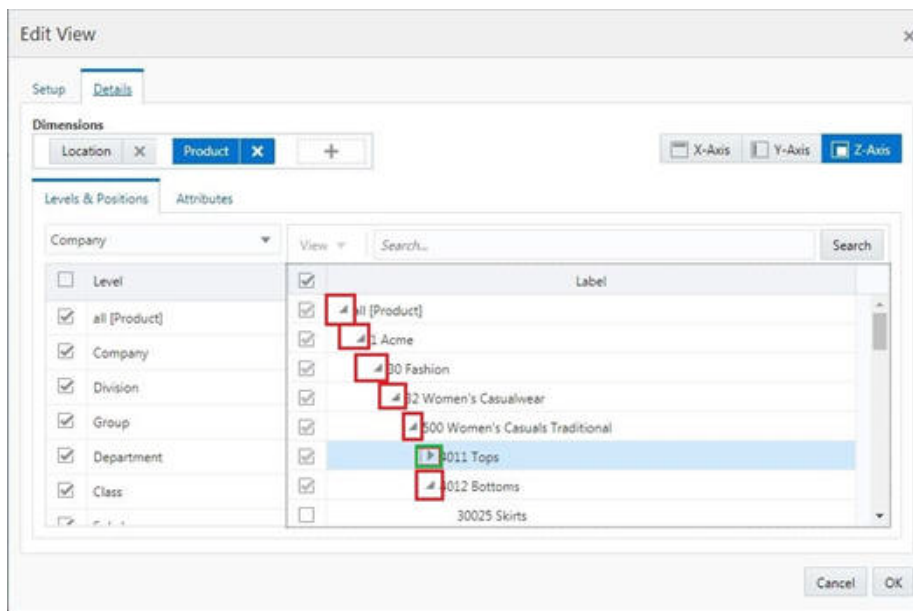
Figure 7–15 Show and Hide Levels

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

Figure 7–16 Selecting and Deselecting All Levels

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

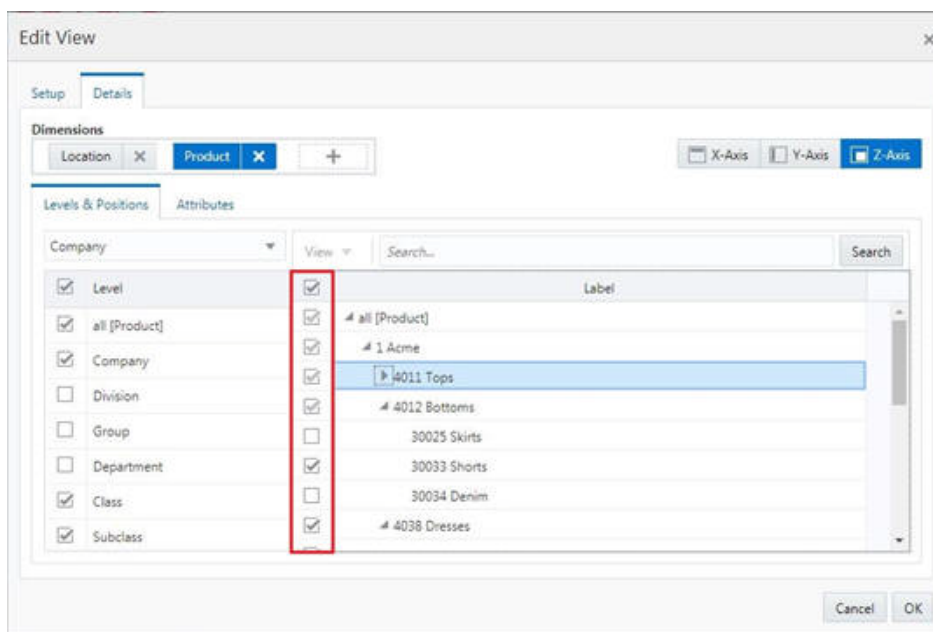
This section provides details about individual data display.

Showing and Hiding Positions

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

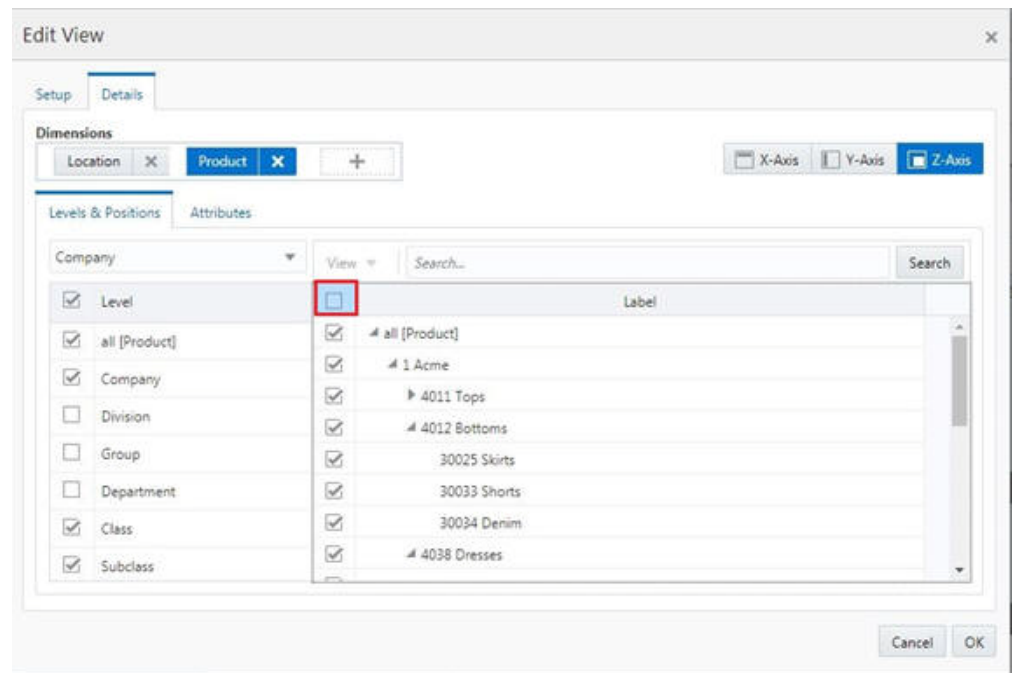
1. Select or unselect the boxes to the left of the positions to change the visible positions.

Figure 7–18 Change Visible Positions



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

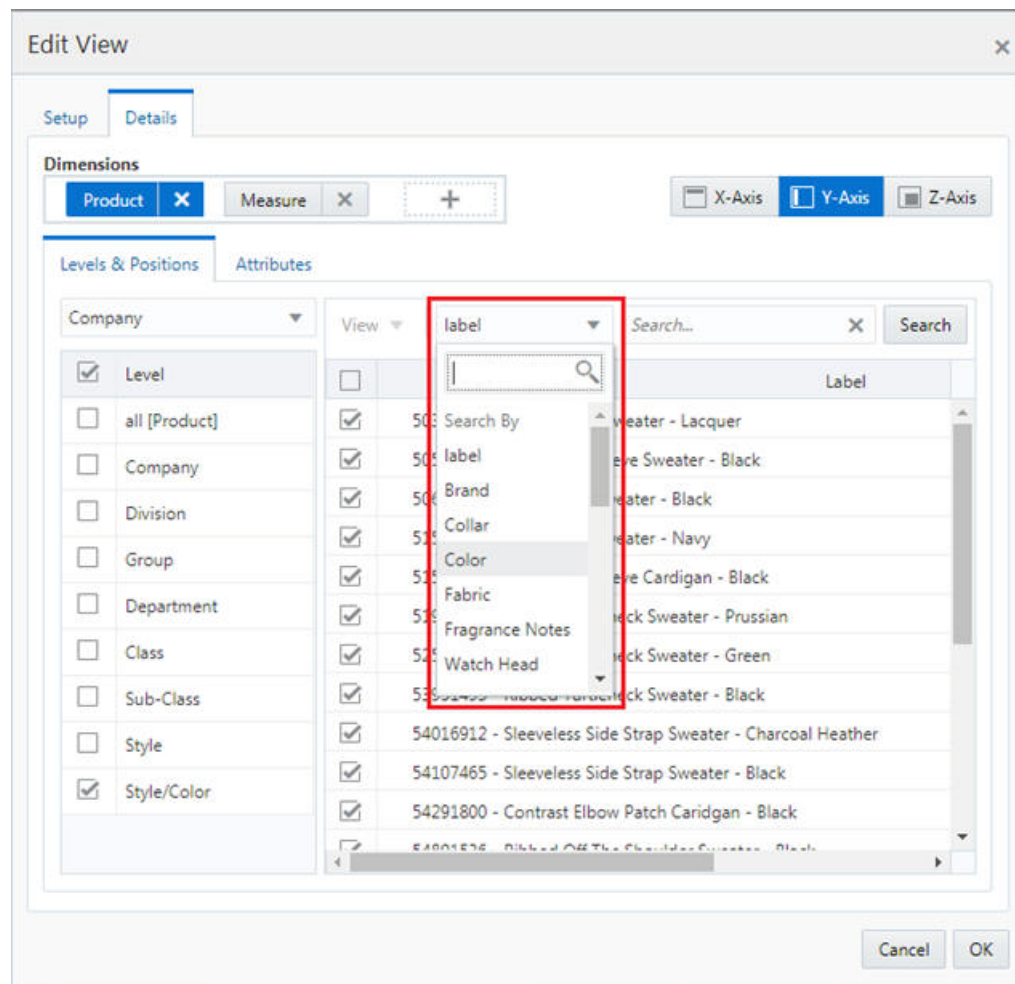
Figure 7-19 All Positions



Filter Positions by Attribute

You can filter the positions by attributes when you review your plan. This allows you to examine the different options that you care about and make decisions. The attribute filter is visible only when attributes are associated with at least one of the selected levels. The filter picklist is by default set to the label attribute.

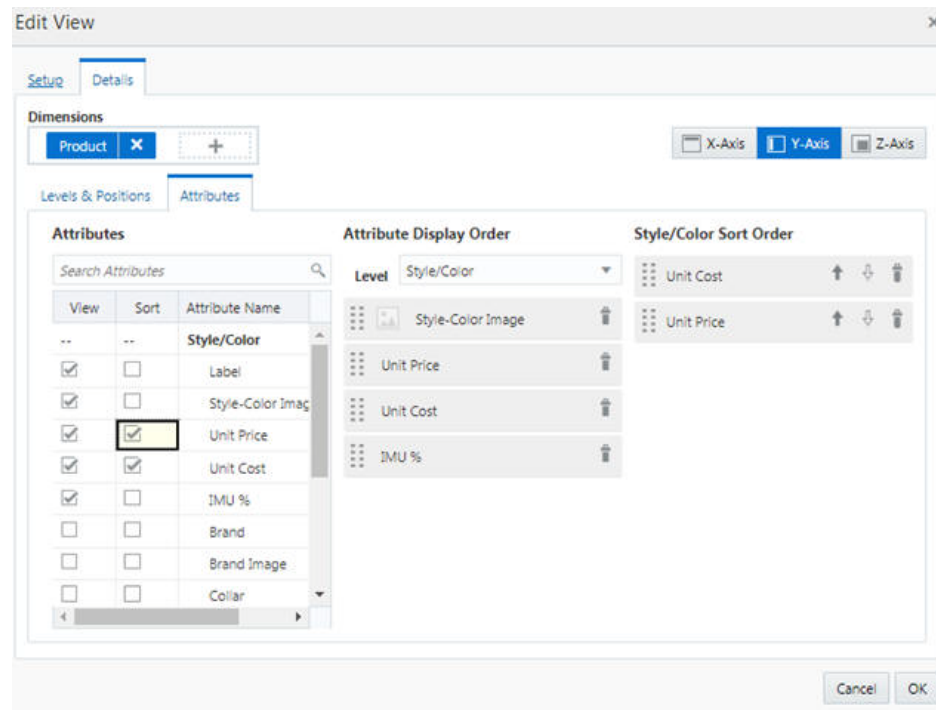
Figure 7–20 Filter Positions Edit View



Attributes

Once Edit View is open to the Details tab, click on Attributes tab. you can view and sort attributes in the view.

1. Select or unselect the boxes to the left of the attribute name positions to viewing and sort availability of particular attributes.

Figure 7-21 Select Attributes for Viewing and Sorting Positions

2. You can change the attribute display order by dragging and dropping the attributes or delete them from display order by clicking on the delete icon. You can also use the level selection to view the attributes at particular hierarchy level.
3. You can change the selected level sort order by changing the ascending and descending order arrows or delete them from sort order by clicking on the delete icon.

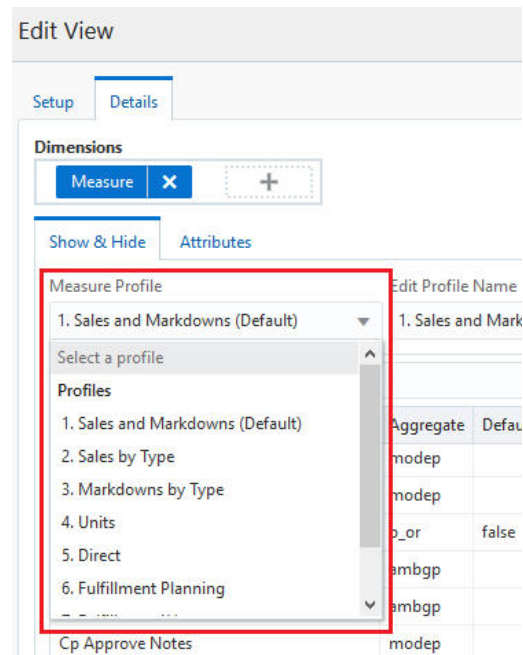
Measure Profiles

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."](#)

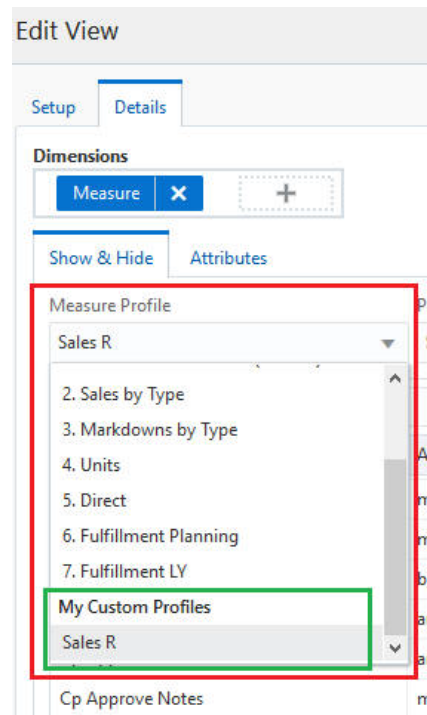
Application-Defined Measure Profiles

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 7-22 Application-Defined Measure Profiles

User-Defined Measure Profiles

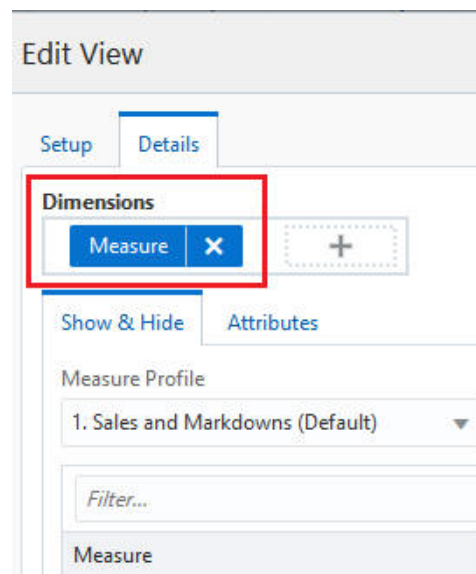
If you generally only work with certain measures, you can create a user-defined measure profile by saving a measure profile. These profiles are usually created by starting with an application-defined or user-defined measure profile, updating the selected measures as needed, and saving the measure profile 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 7-23 User-Defined Measure Profiles

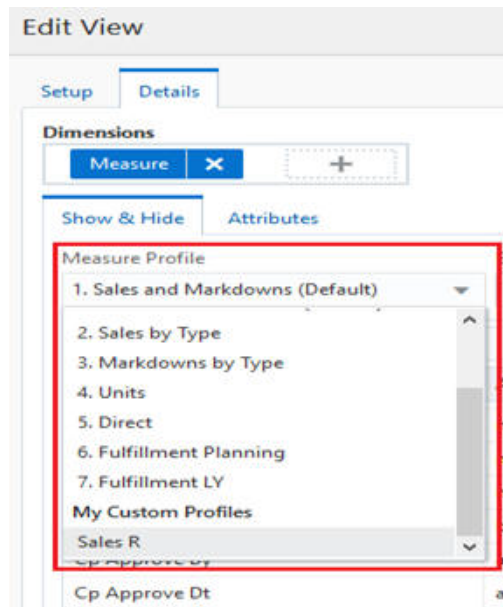
Creating Measure Profiles

To create a measure profile, complete the following steps:

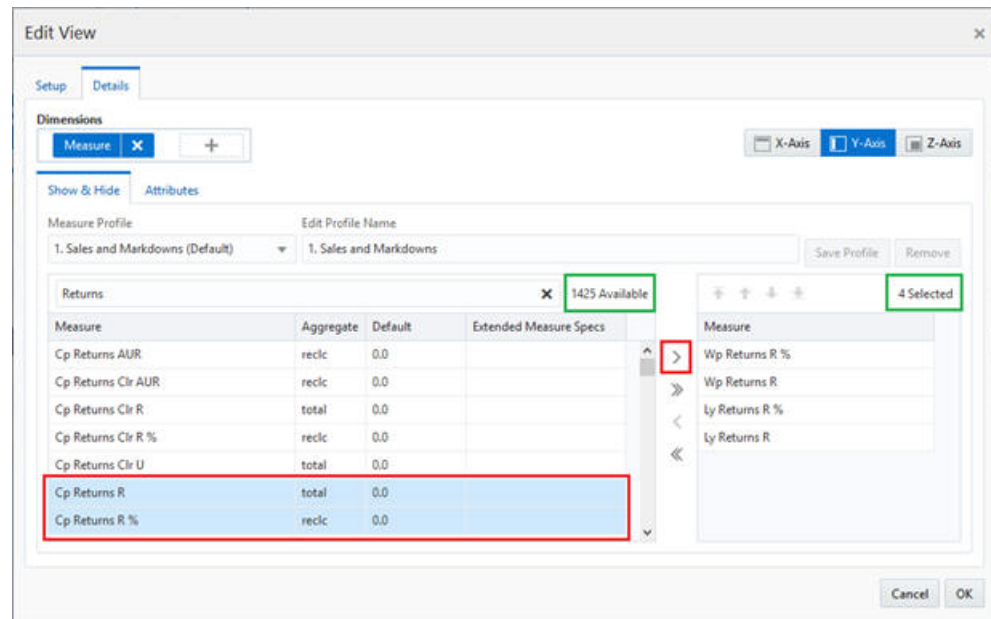
1. Open Edit View and then go to the Measures Dimension Tile.

Figure 7-24 Measure Edit View

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

Figure 7–25 Select Measure Profile

3. Add and remove desired measures. Select one, multiple, or all Available Measures and then add them to the Selected Measures list. Similarly, select one, multiple, or all Selected Measures and remove them by moving them to the Available Measures list.
 - Use the single arrow buttons to add or remove one or more measures.
 - Use the double arrow buttons to add or remove all the measures.
 - When measures are added to the Selected Measures list, they are added after the last highlighted row in the list. This allows you to insert measures anywhere you choose in the list. If no row is highlighted, measures are added to the end of the list.
 - Measures that have been removed are always added back to the Available Measures list in alphabetical order.

Figure 7–26 Select Measures to Add

4. The total count of the available measures and selected measures is displayed. See [Figure 7–26](#). The count of the selected measures is updated when you add or remove measures to or from the Selected Measures list.
5. You can filter or search the Available Measures list. For example, if you type Sales in the Filter... text box, then the available list of measures will be filtered to display measures containing the word "Sales.". Click the X button to clear the text in the Filter text box.

Note that the available count represents the total available measures, not the filtered available measure count. When the Available Measures list is filtered, clicking on the double arrow button will add only the filtered list of measures to the Selected Measures list.

Figure 7-27 Filter Available Measures

Edit View

Setup Details

Dimensions

Measure X +

Show & Hide Attributes

Measure Profile: 1. Sales and Markdowns (Default) Edit Profile Name: 1. Sales and Markdowns

Search: Sales X 1400 Available

| Measure | Aggregate | Default | Extended Measure Specs |
|----------------------|-----------|---------|------------------------|
| Cp Comp Sales R | total | 0.0 | |
| Cp Net Sales AUR | recl | 0.0 | |
| Cp Net Sales Clr AUR | recl | 0.0 | |
| Cp Net Sales Clr R | total | 0.0 | |
| Cp Net Sales Clr U | total | 0.0 | |
| Cp Net Sales LR | total | 0.0 | |
| Cp Net Sales R | total | 0.0 | |

Figure 7-28 Selected Measures Added to Selected Measures List

Edit View

Setup Details

Dimensions

Measure X +

Show & Hide Attributes

Measure Profile: 1. Sales and Markdowns (Default) Edit Profile Name: 1. Sales and Markdowns

Save Profile Remove

Search: Returns X 1423 Available

| Measure | Aggregate | Default | Extended Measure Specs |
|---------------------------|-----------|---------|------------------------|
| Cp Returns AUR | recl | 0.0 | |
| Cp Returns Clr AUR | recl | 0.0 | |
| Cp Returns Clr R | total | 0.0 | |
| Cp Returns Clr R % | recl | 0.0 | |
| Cp Returns Clr U | total | 0.0 | |
| Cp Returns Reg+ Promo AUR | recl | 0.0 | |
| Cp Returns Reg+ Promo R | total | 0.0 | |

6 Selected

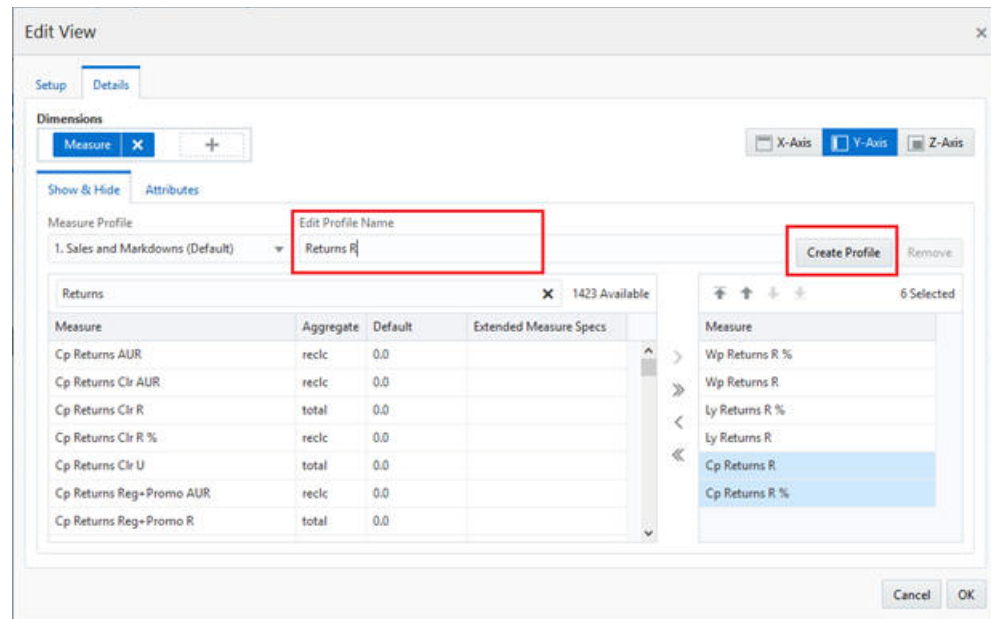
Measure

- Wp Returns R %
- Wp Returns R
- Ly Returns R %
- Ly Returns R
- Cp Returns R
- Cp Returns R %

Cancel OK

6. Type a profile name in the Edit Profile Name text box and click **Create Profile**.

Figure 7–29 Create Profile

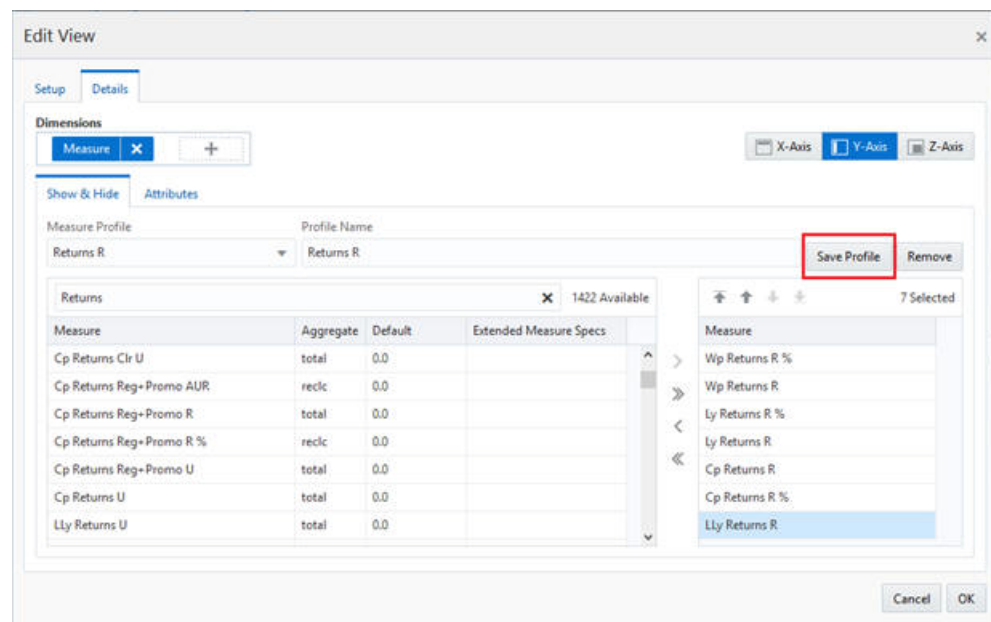


Editing and Deleting Measure Profiles

To edit a measure profile, complete the following steps:

1. Open Edit View and go to the Measures Dimension tile.
2. Select a Custom Measure Profile from the Measure Profile drop-down list.
3. Add or remove measures to or from the Selected Measure list.
4. Click **Save Profile**. The measure profile is updated to reflect the selected measures.

Figure 7–30 Save Profile

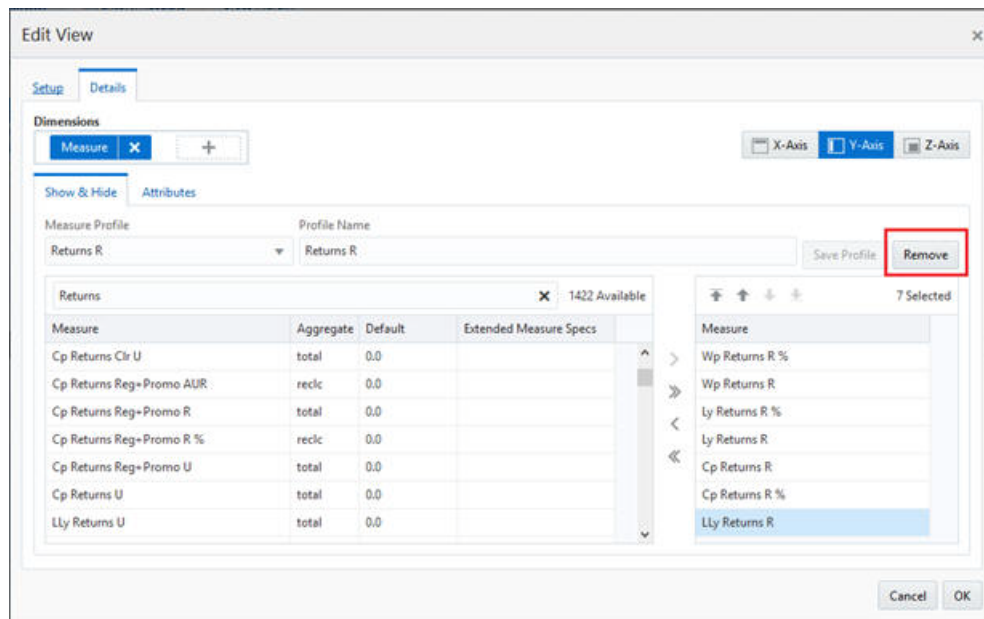


5. If you edit a System Measure Profile, you must create a new measure profile; if you do not, the changes made in the Selected list will be lost when you switch between measure profiles.

To delete a measure profile, complete the following steps:

1. Open Edit View and go to the Measures Dimension tile.
2. Select a custom measure profile from the Measure Profile drop-down list.
3. Click **Remove**. The measure profile is deleted. You cannot delete a system measure profile.

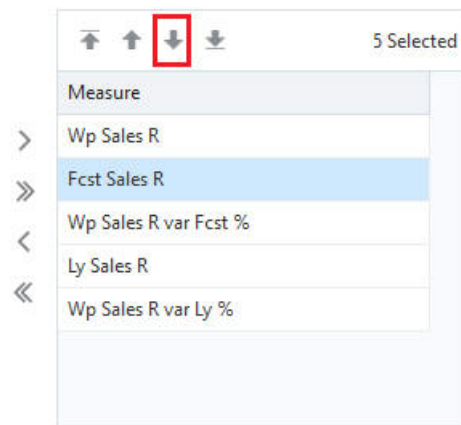
Figure 7–31 Remove Profile



Reordering Measures

You can reorder the measures using the Measure Edit View dialog box.

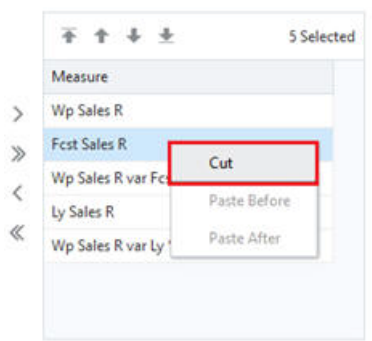
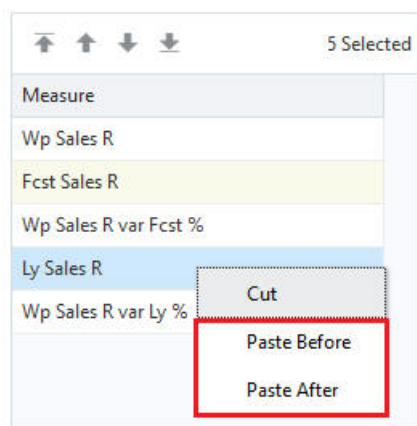
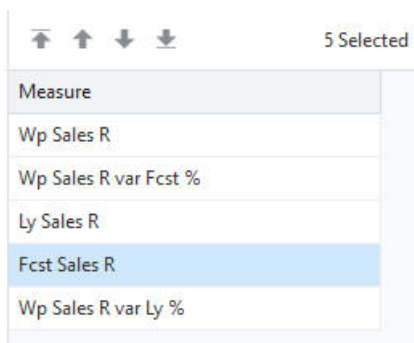
1. You can select a measures in Selected Measures and move the measures in following ways:

Figure 7-32 Re-Order Measures Using Arrows

- Move First - Moves selected measures up to the top of the list.
- Move Up - Moves selected measures up one position relative to the selected measures
- Move Down - Moves selected measures down one position relative to the selected measures
- Move Last - Moves selected measures down to the bottom of the list.

In the following example, Fcst Sales R has been selected. Clicking on Move Down causes the measure to be moved below Wp Sales R var Fcst %.

2. You can also select measures and use the context menu to reposition the selected measure row. In the following example, Fcst Sales R has been selected. Right click the selected measure and select the Cut option from the context menu. Then, select the measure above or below the one where you want to paste the Fcst Sales R measure. Select Paste Before or Paste After as necessary in order to re-position the Fcst Sales R measure. As shown in [Figure 7-33](#) and [Figure 7-34](#), selecting Paste After on Ly Sales R measure, pasted Fcst Sales R measure after Ly Sales R measure.
 - When the Cut operation is followed by the contiguous selection of more than one rows and the Paste Before/ After operation, Paste Before pastes the clipboard data before the first selected row and Paste After pastes the clipboard data after the last selected row.
 - When the Cut operation is followed by the non-contiguous selection of more than one rows and the Paste Before/ After operation, Paste Before pastes the clipboard data before the last selected row and Paste After pastes the clipboard data after the last selected row.

Figure 7–33 Re-Order Measures: Cut Selected Measure**Figure 7–34 Re-Order Measure: Paste Selected Measure****Figure 7–35 Re-Order Measure: Results of Paste**

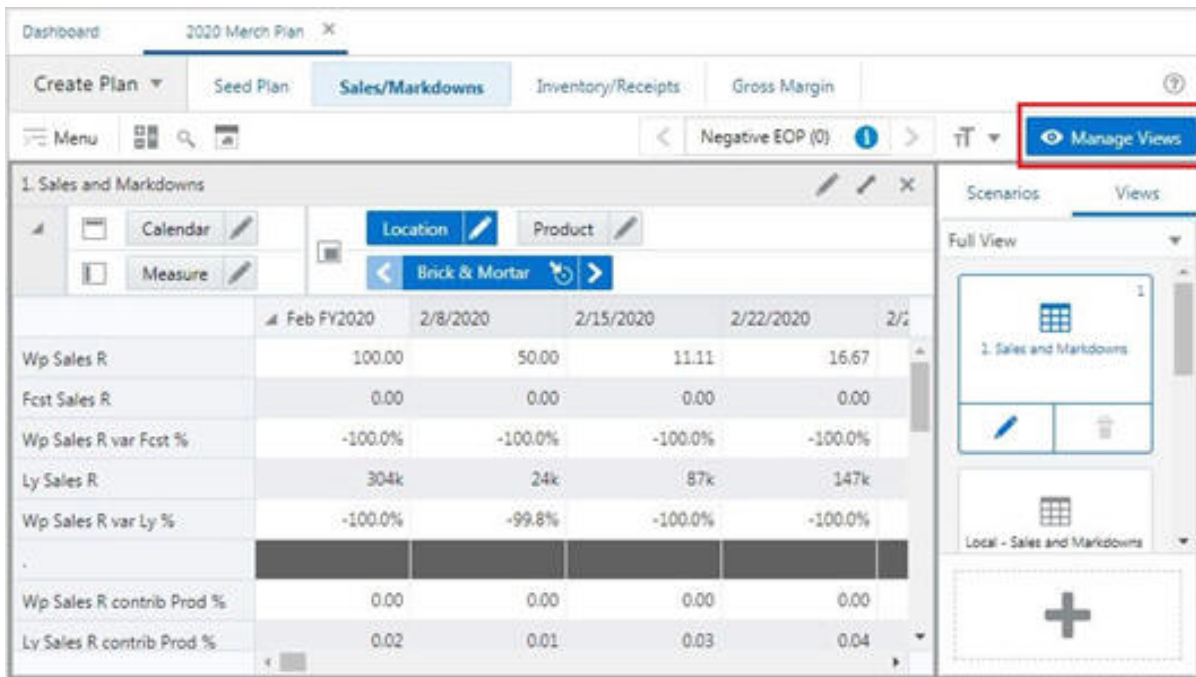
The view area includes the multidimensional pivot table or chart that displays information for the relevant task. Each task may include more than one view, and each view can appear in the contents area. The information in the view is organized based on the dimension positions set up at the *x*, *y*,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

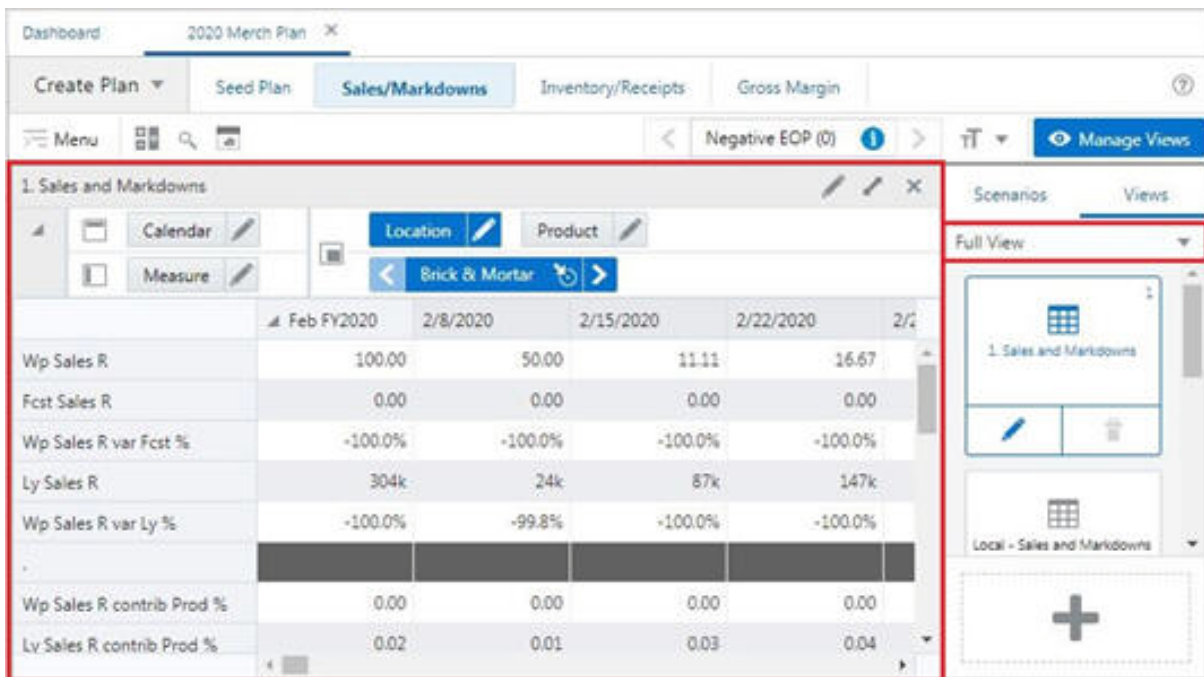
Figure 8–2 Full View Layout

Figure 8–3 Four-Tile View Layout

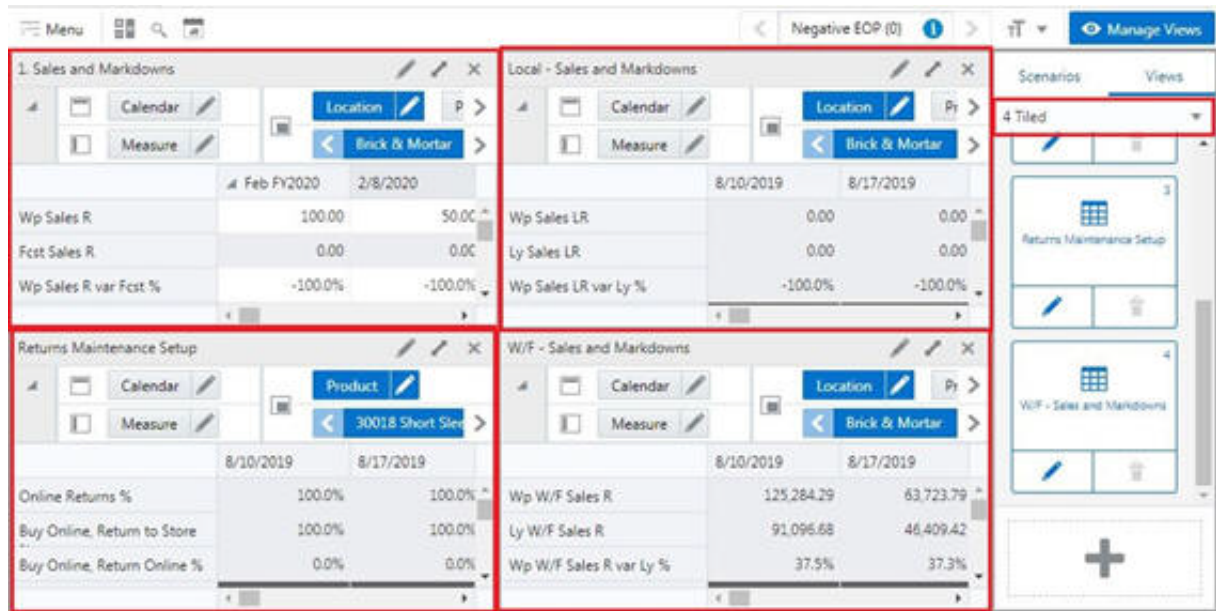


Figure 8–4 Two Vertical View Layout

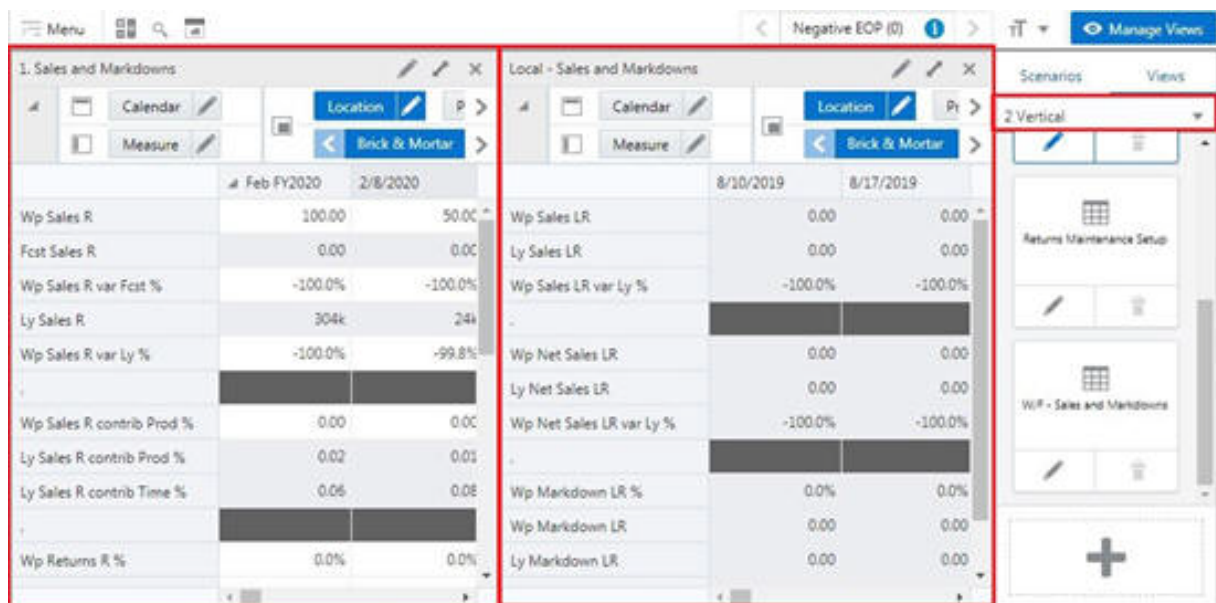
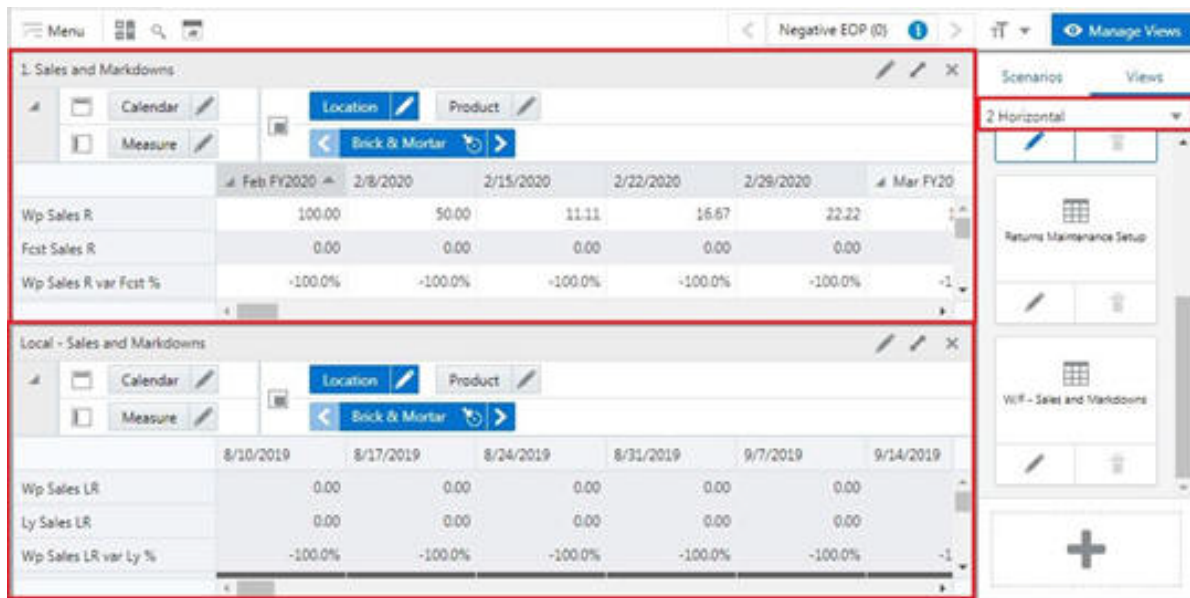
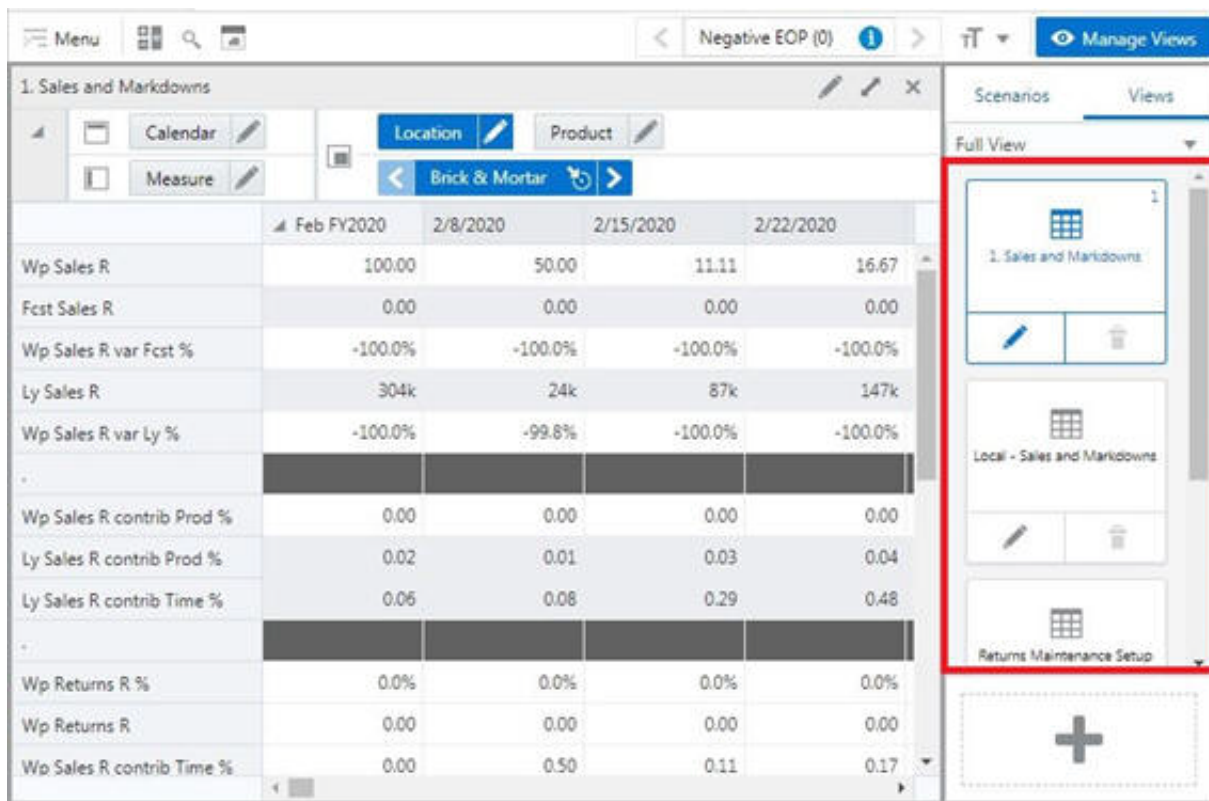


Figure 8–5 Two Horizontal View Layout

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

| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 |
|---------------------------|------------|----------|-----------|-----------|
| Wp Sales R | 100.00 | 50.00 | 11.11 | 16.67 |
| Fcst Sales R | 0.00 | 0.00 | 0.00 | 0.00 |
| Wp Sales R var Fcst % | -100.0% | -100.0% | -100.0% | -100.0% |
| Ly Sales R | 304k | 24k | 87k | 147k |
| Wp Sales R var Ly % | -100.0% | -99.8% | -100.0% | -100.0% |
| - | | | | |
| Wp Sales R contrib Prod % | 0.00 | 0.00 | 0.00 | 0.00 |
| Ly Sales R contrib Prod % | 0.02 | 0.01 | 0.03 | 0.04 |
| Ly Sales R contrib Time % | 0.06 | 0.08 | 0.29 | 0.48 |
| - | | | | |
| Wp Returns R % | 0.0% | 0.0% | 0.0% | 0.0% |
| Wp Returns R | 0.00 | 0.00 | 0.00 | 0.00 |
| Wp Sales R contrib Time % | 0.00 | 0.50 | 0.11 | 0.17 |

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 Setup Options

Edit View

Setup Details

Source *

Select a source

Select a source

1. Sales and Markdowns

Local - Sales and Markdowns

Returns Maintenance Setup

W/F - Sales and Markdowns

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

Figure 8–9 Display Name

The screenshot shows the 'Edit View' dialog box with the 'Setup' tab selected. The 'Source' dropdown is set to '1. Sales and Markdowns'. The 'Display Name' text box is highlighted with a red rectangle and contains the text 'Sales & Markdowns Chart View'. The 'View Type' dropdown is set to 'Pivot Table'.

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

The screenshot shows the 'Edit View' dialog box with the 'Details' tab selected. The 'View Type' dropdown menu is open, displaying a list of view types: Pivot Table, Bar Chart (selected), Area Chart, Line Chart, Pie Chart, Combination Chart, Line with Area Chart, and Funnel Chart. The dropdown menu is highlighted with a red rectangle.

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

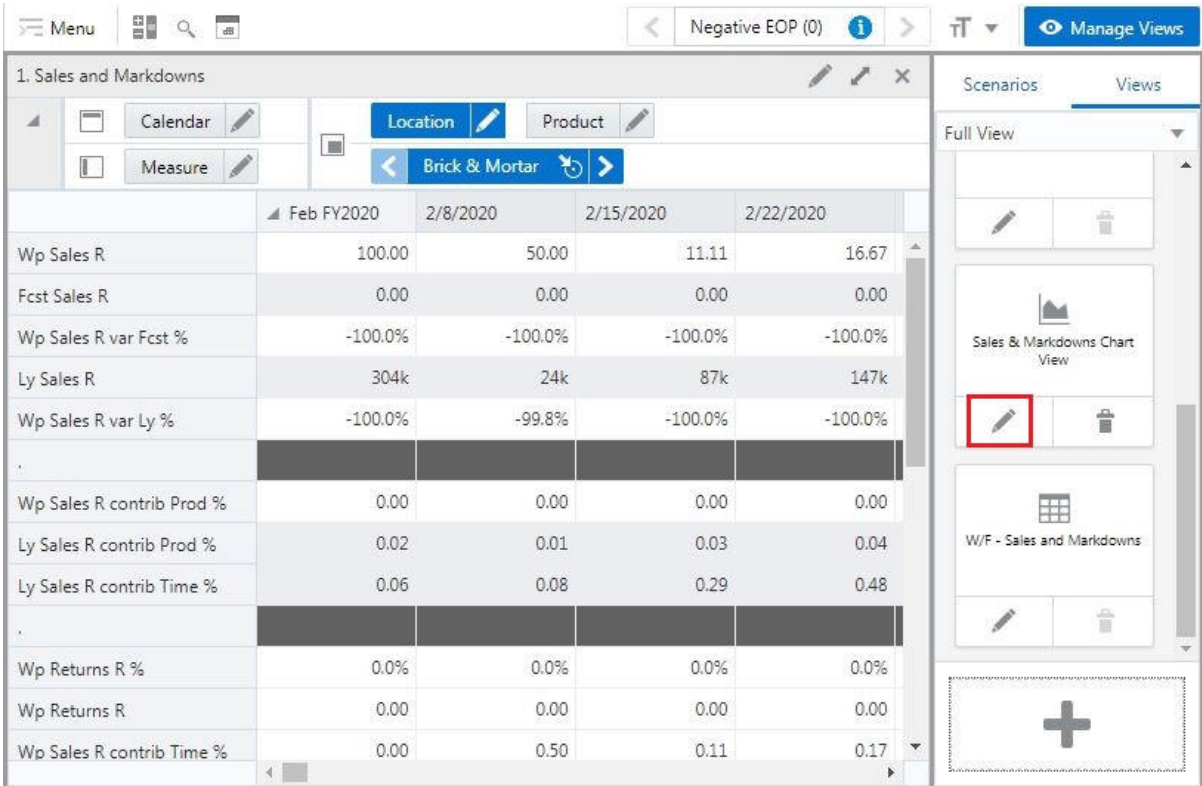
For more information on how to perform above steps, see [Chapter 7, "Editing Views."](#)

Modifying a View

To modify a view, complete the following steps:

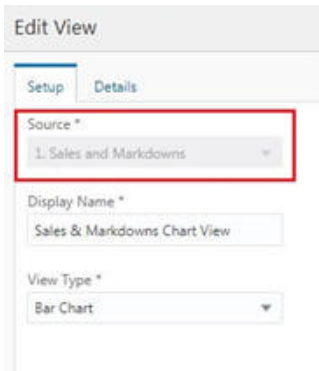
1. Click **Edit** on the View tile in the View Management Drawer.

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 > Source (grayed out)



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

The screenshot shows the Oracle Retail Predictive Application interface. The main window displays a table titled "1. Sales and Markdowns" for the "Brick & Mortar" location. The table has columns for "Feb FY2020", "2/8/2020", "2/15/2020", and "2/22/2020". The table lists various sales and markdown metrics, including "Wp Sales R", "Fcst Sales R", "Wp Sales R var Fcst %", "Ly Sales R", "Wp Sales R var Ly %", "Wp Sales R contrib Prod %", "Ly Sales R contrib Prod %", "Ly Sales R contrib Time %", "Wp Returns R %", "Wp Returns R", and "Wp Sales R contrib Time %".

On the right side, the "Manage Views" drawer is open, showing a list of views under the "Views" tab. The "Sales & Markdowns Chart View" is highlighted, and its "Delete" icon (trash can) is disabled, indicated by a red box around the icon.

| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 |
|---------------------------|------------|----------|-----------|-----------|
| Wp Sales R | 100.00 | 50.00 | 11.11 | 16.67 |
| Fcst Sales R | 0.00 | 0.00 | 0.00 | 0.00 |
| Wp Sales R var Fcst % | -100.0% | -100.0% | -100.0% | -100.0% |
| Ly Sales R | 304k | 24k | 87k | 147k |
| Wp Sales R var Ly % | -100.0% | -99.8% | -100.0% | -100.0% |
| Wp Sales R contrib Prod % | 0.00 | 0.00 | 0.00 | 0.00 |
| Ly Sales R contrib Prod % | 0.02 | 0.01 | 0.03 | 0.04 |
| Ly Sales R contrib Time % | 0.06 | 0.08 | 0.29 | 0.48 |
| Wp Returns R % | 0.0% | 0.0% | 0.0% | 0.0% |
| Wp Returns R | 0.00 | 0.00 | 0.00 | 0.00 |
| Wp Sales R contrib Time % | 0.00 | 0.50 | 0.11 | 0.17 |

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

1. Sales and Markdowns

Calendar Location Product Measure

Brick & Mortar

| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 |
|---------------------------|------------|----------|-----------|-----------|
| Wp Sales R | 100.00 | 50.00 | 11.11 | 16.67 |
| Fcst Sales R | 0.00 | 0.00 | 0.00 | 0.00 |
| Wp Sales R var Fcst % | -100.0% | -100.0% | -100.0% | -100.0% |
| Ly Sales R | 304k | 24k | 87k | 147k |
| Wp Sales R var Ly % | -100.0% | -99.8% | -100.0% | -100.0% |
| Wp Sales R contrib Prod % | 0.00 | 0.00 | 0.00 | 0.00 |
| Ly Sales R contrib Prod % | 0.02 | 0.01 | 0.03 | 0.04 |
| Ly Sales R contrib Time % | 0.06 | 0.08 | 0.29 | 0.48 |
| Wp Returns R % | 0.0% | 0.0% | 0.0% | 0.0% |
| Wp Returns R | 0.00 | 0.00 | 0.00 | 0.00 |
| Wp Sales R contrib Time % | 0.00 | 0.50 | 0.11 | 0.17 |

Manage Views

Scenarios Views

Full View

1. Sales and Markdowns

Local - Sales and Markdowns

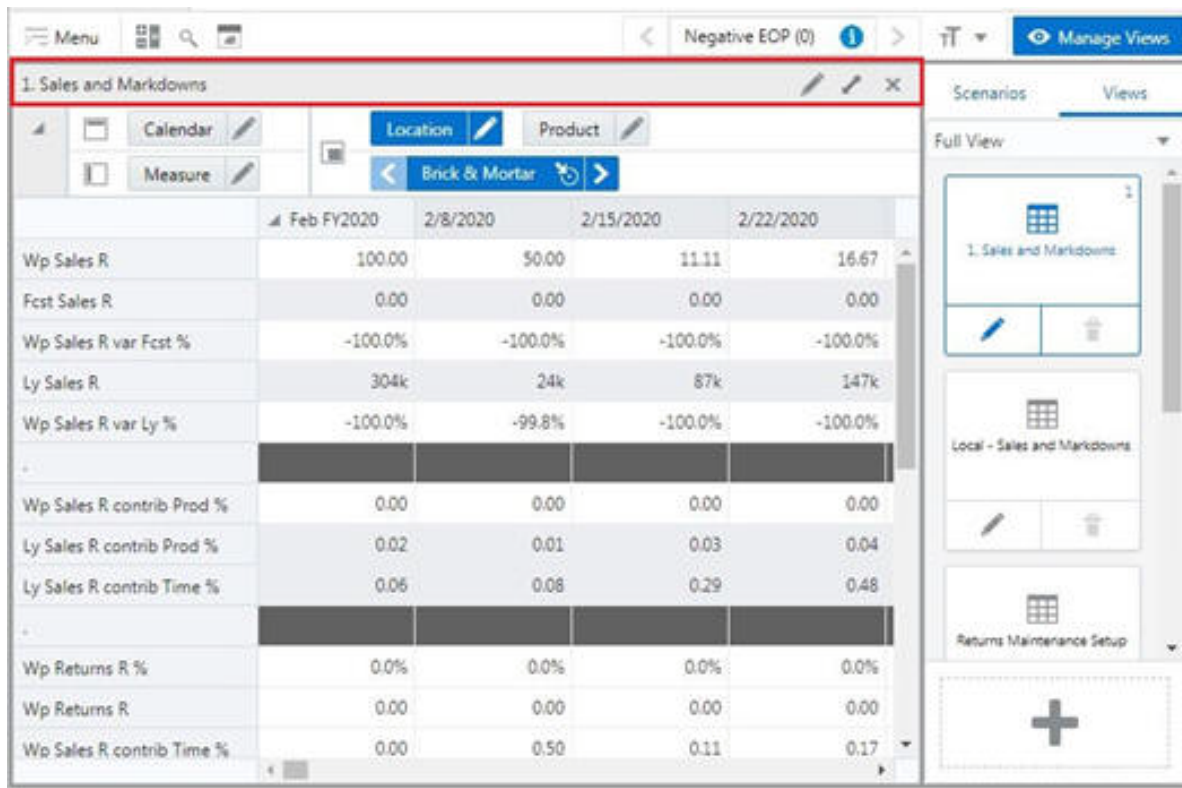
Returns Maintenance Setup

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

Edit View

Setup Details

Source *

1. Sales and Markdowns

Display Name *

1. Sales and Markdowns

View Type *

Pivot Table

The Expand button maximizes and detaches the view.

Figure 8-17 Maximized View

| | Feb FY2020 | 2/8/202 | | 8/10/2019 | 8/17/2019 |
|-----------------------|------------|---------|----------------------|-----------|-----------|
| Wp Sales R | 100.00 | | Wp Sales LR | 0.00 | |
| Fcst Sales R | 0.00 | | Ly Sales LR | 0.00 | |
| Wp Sales R var Fcst % | -100.0% | | Wp Sales LR var Ly % | -100.0% | |
| Ly Sales R | 304k | | | | |
| Wp Sales R var Ly % | -100.0% | | Wp Net Sales LR | 0.00 | |
| | | | Ly Net Sales LR | 0.00 | |
| Wp Sales R contrib | 0.00 | | Wp Net Sales LR var | -100.0% | |
| Ly Sales R contrib | 0.02 | | | | |
| Ly Sales R contrib | 0.06 | | Wp Markdown LR % | 0.0% | |
| | | | Wp Markdown LR | 0.00 | |
| Wp Returns R % | 0.0% | | Ly Markdown LR | 0.00 | |
| Wp Returns R | 0.00 | | Wp Markdown LR | -100.0% | |
| Wp Sales R contrib | 0.00 | | Merch Plan Notes | | |

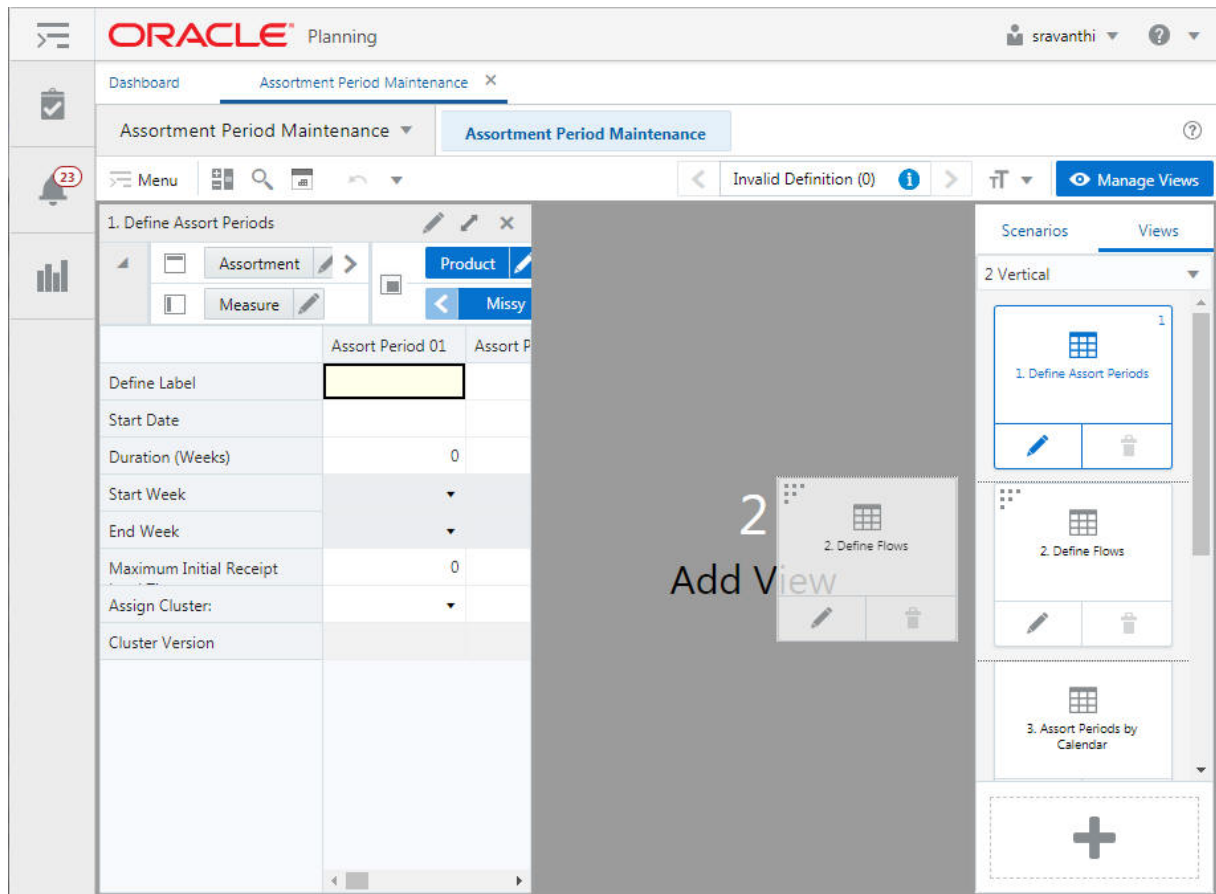
The detached view has Edit and Collapse.

Figure 8–18 Detached View with Edit and Collapse

| 1. Sales and Markdowns (Detached View) | | | | | | | |
|--|------------|----------|-----------|----------------|-----------|------------|----------|
| Menu | Calendar | Location | Product | Brick & Mortar | | | |
| Measure | | | | | | | |
| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 | 2/29/2020 | Mar FY2020 | 3/7/2020 |
| Wp Sales R | 100.00 | 50.00 | 11.11 | 16.67 | 22.22 | 180.00 | |
| Fcst Sales R | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Wp Sales R var Fcst % | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | |
| Ly Sales R | 304k | 24k | 87k | 147k | 45k | 222k | |
| Wp Sales R var Ly % | -100.0% | -99.8% | -100.0% | -100.0% | -100.0% | -99.9% | |
| Wp Sales R contrib | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Ly Sales R contrib | 0.02 | 0.01 | 0.03 | 0.04 | 0.01 | 0.02 | |
| Ly Sales R contrib | 0.06 | 0.08 | 0.29 | 0.48 | 0.15 | 0.04 | |
| Wp Returns R % | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| Wp Returns R | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Wp Sales R contrib | 0.00 | 0.50 | 0.11 | 0.17 | 0.22 | 0.00 | |
| Ly Returns R % | 41.0% | 37.1% | 41.5% | 41.7% | 39.8% | 40.2% | |
| Wp Net Sales R | 100 | 50 | 11 | 17 | 22 | 180 | |
| Ly Returns R | 124 517.33 | 9 066.93 | 36 206.88 | 61 171.62 | 18 071.90 | 89 272.09 | 16 |
| <div> <div>Calculate (F9)</div> <div>Seed</div> <div>Refresh Fulfillment</div> <div>Commit (F8)</div> </div> | | | | | | | |

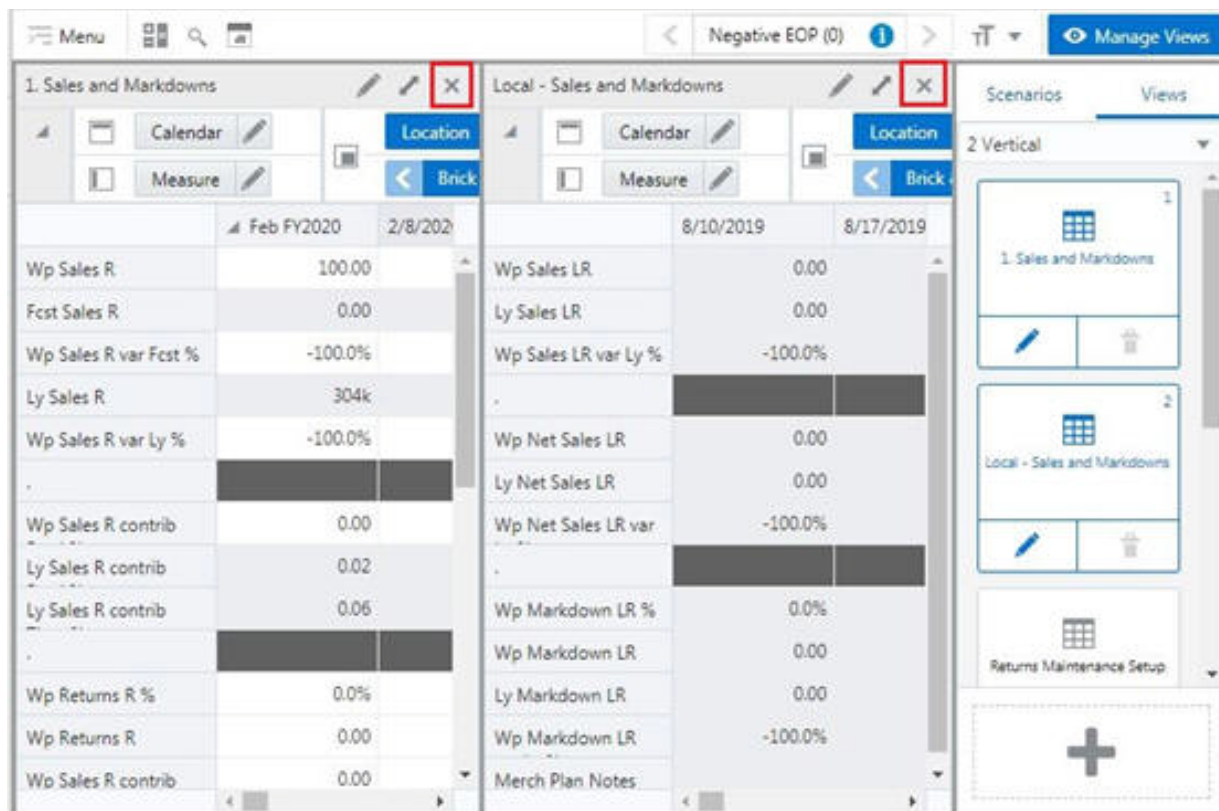
Adding a View to a Layout

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.

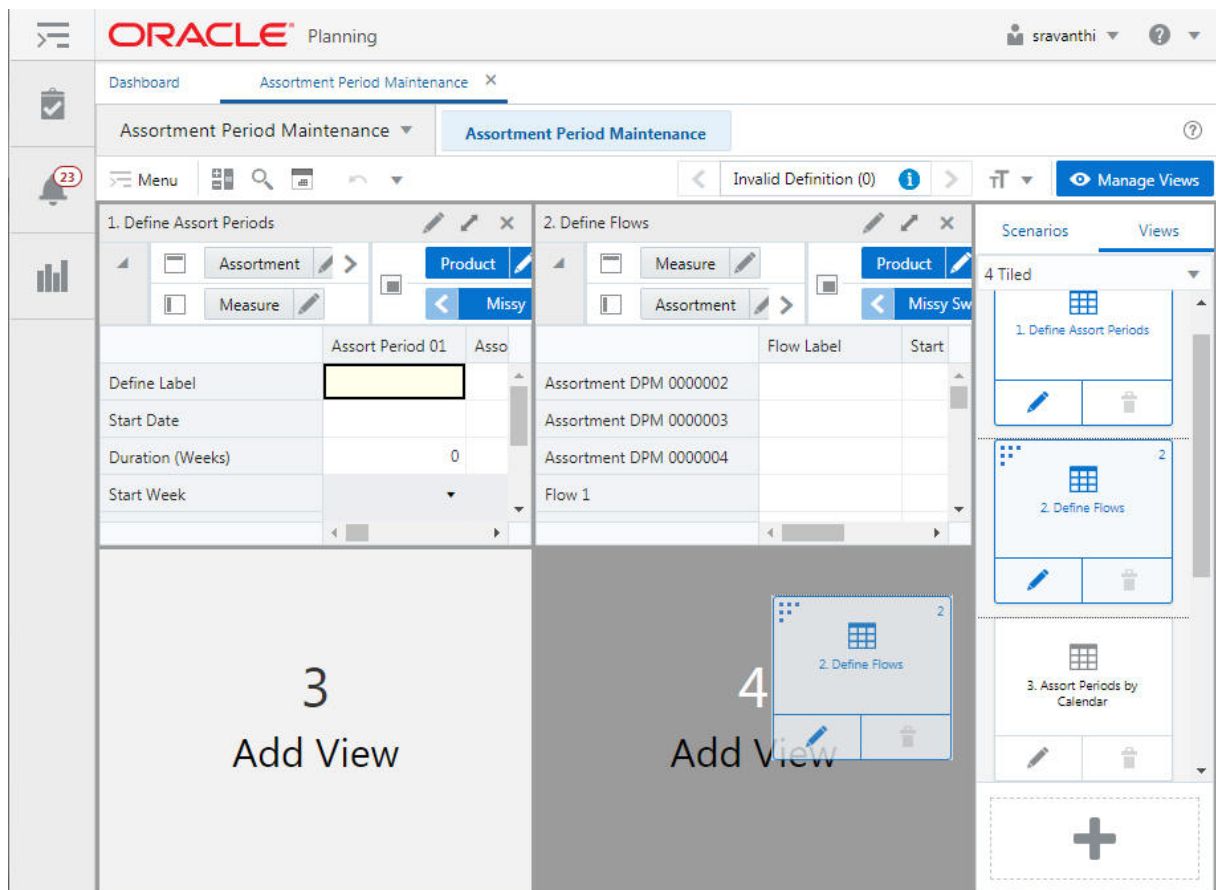
Figure 8–20 Removing a View from a Layout

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

| 1. Sales and Markdowns | | Local - Sales and Markdowns | |
|------------------------|------------|-----------------------------|-----------|
| | Feb FY2020 | | 8/10/2019 |
| Wp Sales R | 100.00 | Wp Sales LR | 0.00 |
| Fcst Sales R | 0.00 | Ly Sales LR | 0.00 |
| Wp Sales R var Fcst % | -100.0% | Wp Sales LR var Ly % | -100.0% |
| Ly Sales R | 304k | | |
| Wp Sales R var Ly % | -100.0% | Wp Net Sales LR | 0.00 |
| | | Ly Net Sales LR | 0.00 |
| | | Wp Net Sales LR var | -100.0% |
| Wp Sales R contrib | 0.00 | | |
| Ly Sales R contrib | 0.02 | Wp Markdown LR % | 0.0% |
| Ly Sales R contrib | 0.06 | Wp Markdown LR | 0.00 |
| | | Ly Markdown LR | 0.00 |
| Wp Returns R % | 0.0% | Wp Markdown LR | -100.0% |
| Wp Returns R | 0.00 | Merch Plan Notes | |
| Wp Sales R contrib | 0.00 | | |

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

Figure 8–23 Change the Display Name

Edit View

Setup

Details

Source *

1. Sales and Markdowns

Display Name *

1. Sales and Markdowns

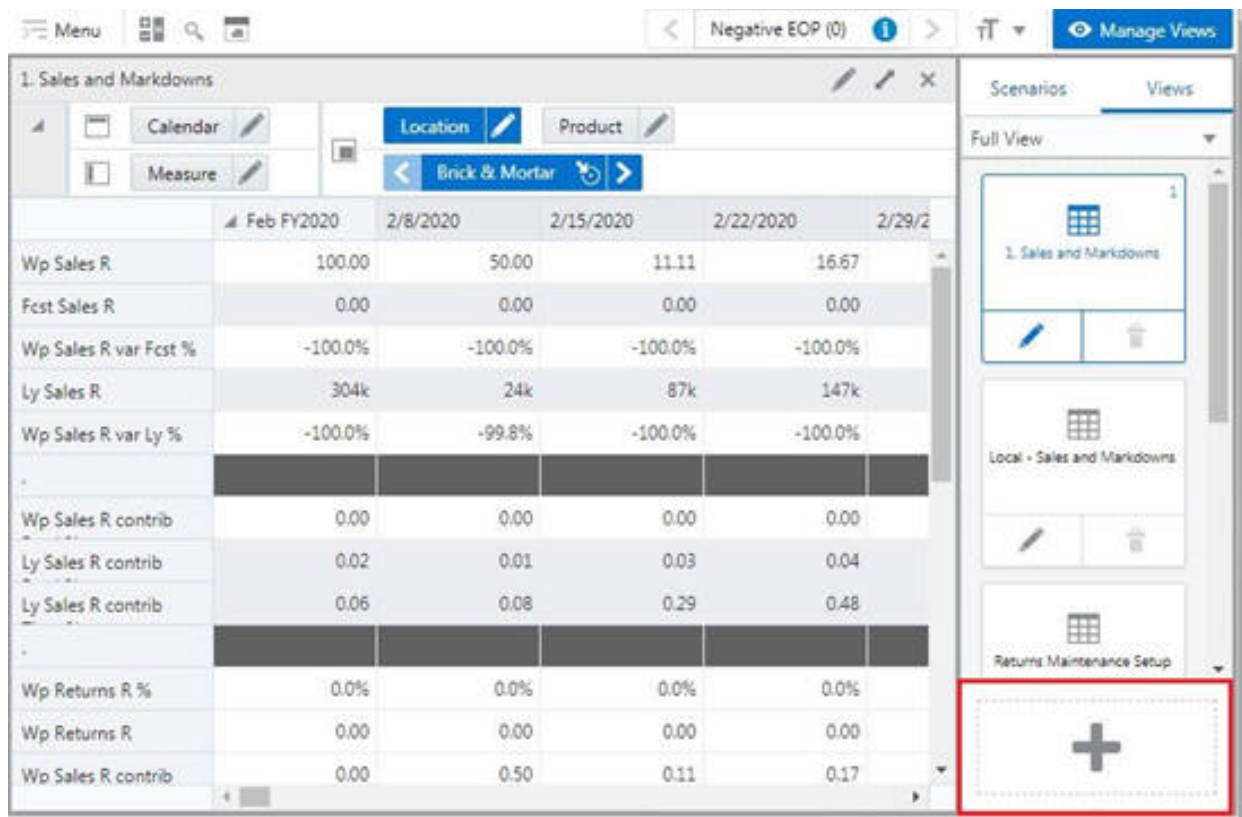
View Type *

Pivot Table

Copying a View

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

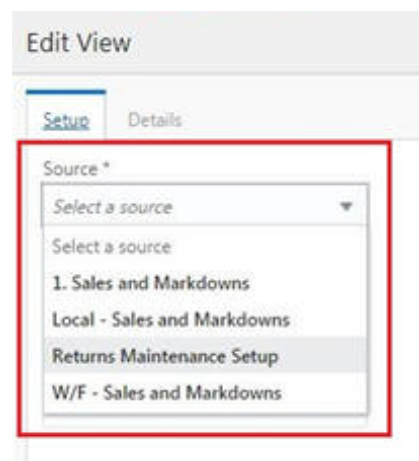
1. Click **Plus** to open Edit View.

Figure 8–24 Copying a View


1. Sales and Markdowns

| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 | 2/29/2020 |
|-----------------------|------------|----------|-----------|-----------|-----------|
| Wp Sales R | 100.00 | 50.00 | 11.11 | 16.67 | |
| Fcst Sales R | 0.00 | 0.00 | 0.00 | 0.00 | |
| Wp Sales R var Fcst % | -100.0% | -100.0% | -100.0% | -100.0% | |
| Ly Sales R | 304k | 24k | 87k | 147k | |
| Wp Sales R var Ly % | -100.0% | -99.8% | -100.0% | -100.0% | |
| Wp Sales R contrib | 0.00 | 0.00 | 0.00 | 0.00 | |
| Ly Sales R contrib | 0.02 | 0.01 | 0.03 | 0.04 | |
| Ly Sales R contrib | 0.06 | 0.08 | 0.29 | 0.48 | |
| Wp Returns R % | 0.0% | 0.0% | 0.0% | 0.0% | |
| Wp Returns R | 0.00 | 0.00 | 0.00 | 0.00 | |
| Wp Sales R contrib | 0.00 | 0.50 | 0.11 | 0.17 | |

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 Selecting a View


Edit View

Setup Details

Source *

Select a source

Select a source

1. Sales and Markdowns

Local - Sales and Markdowns

Returns Maintenance Setup

W/F - Sales and Markdowns

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 View Before Page Edge Synchronization

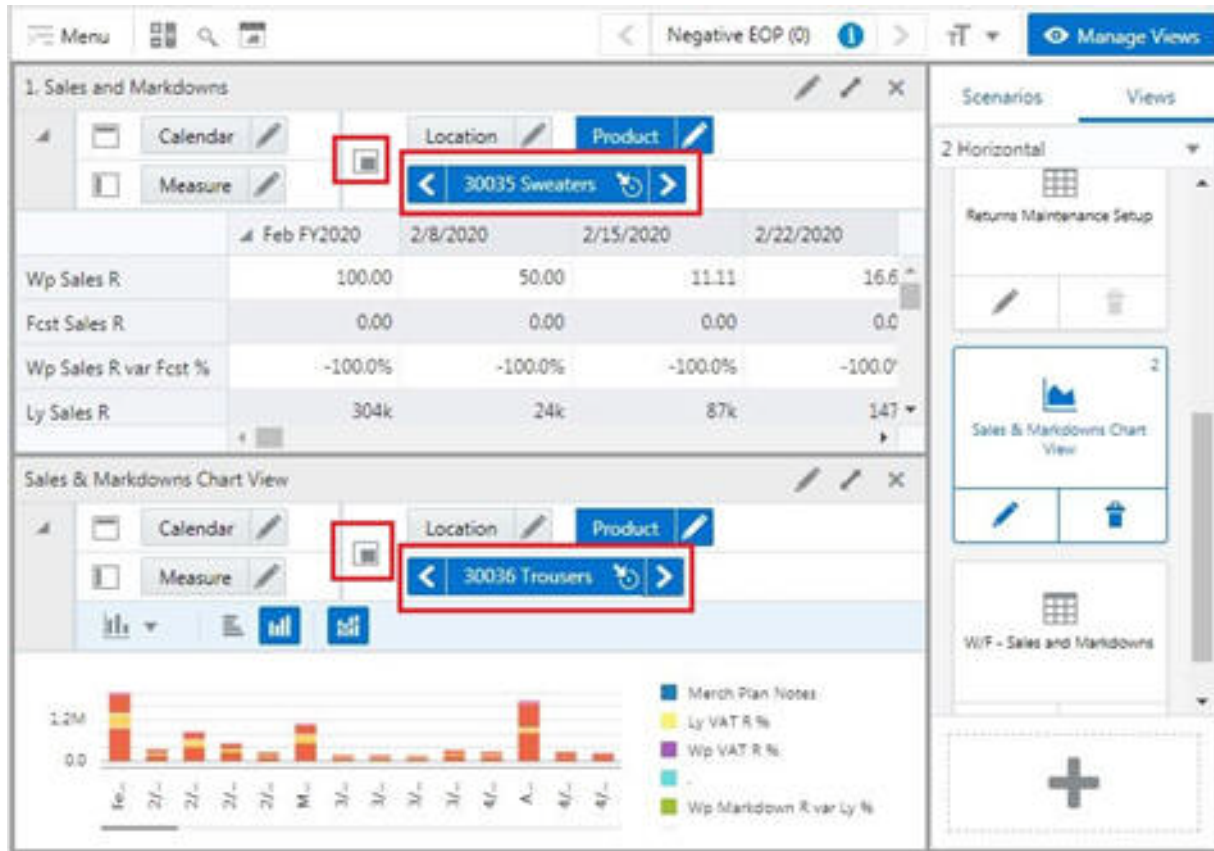
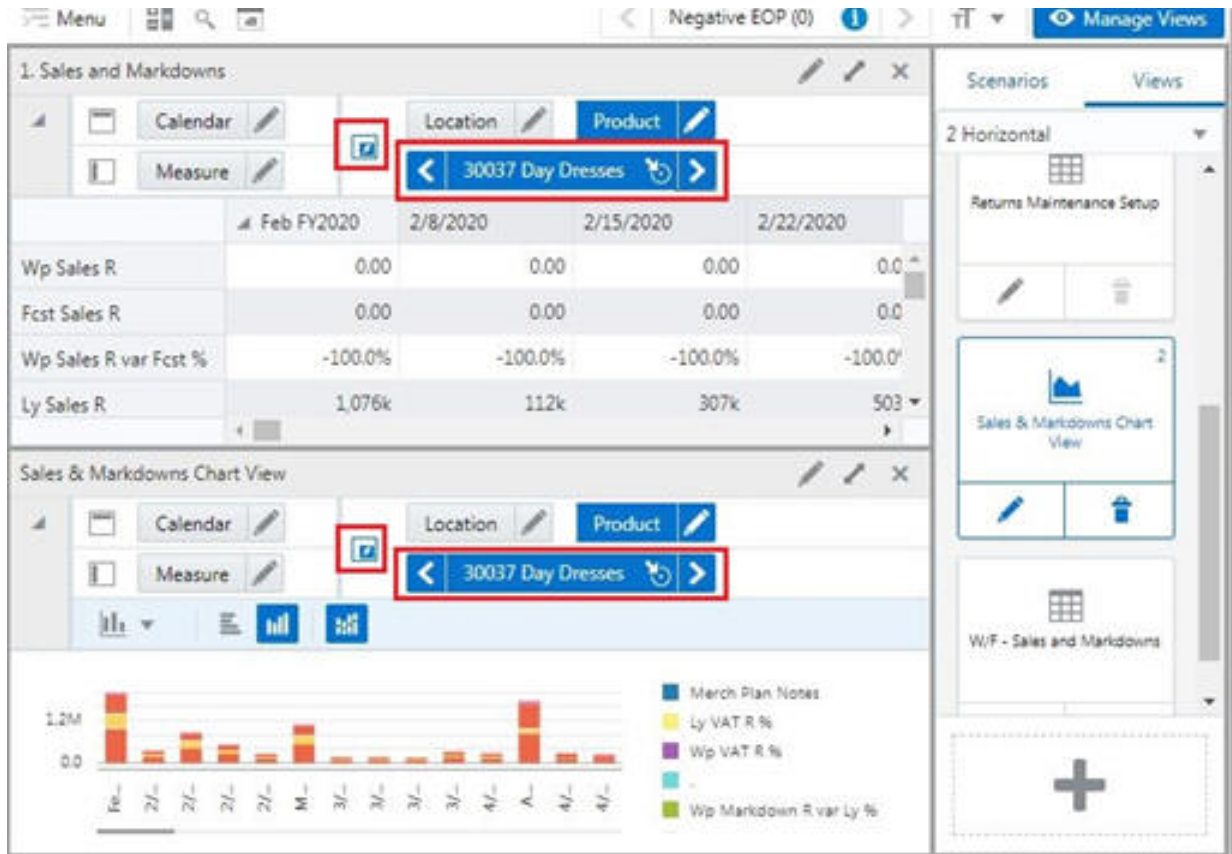
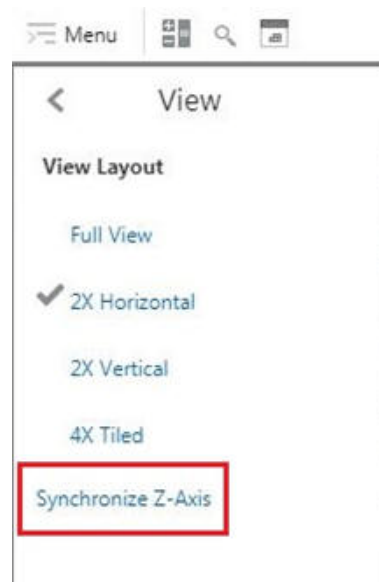


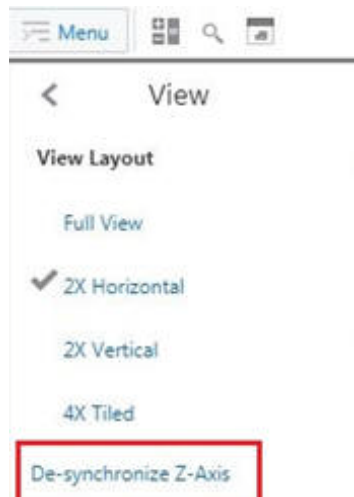
Figure 8–27 Enabling Z-Axis Synchronization

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*



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-Horizontal 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

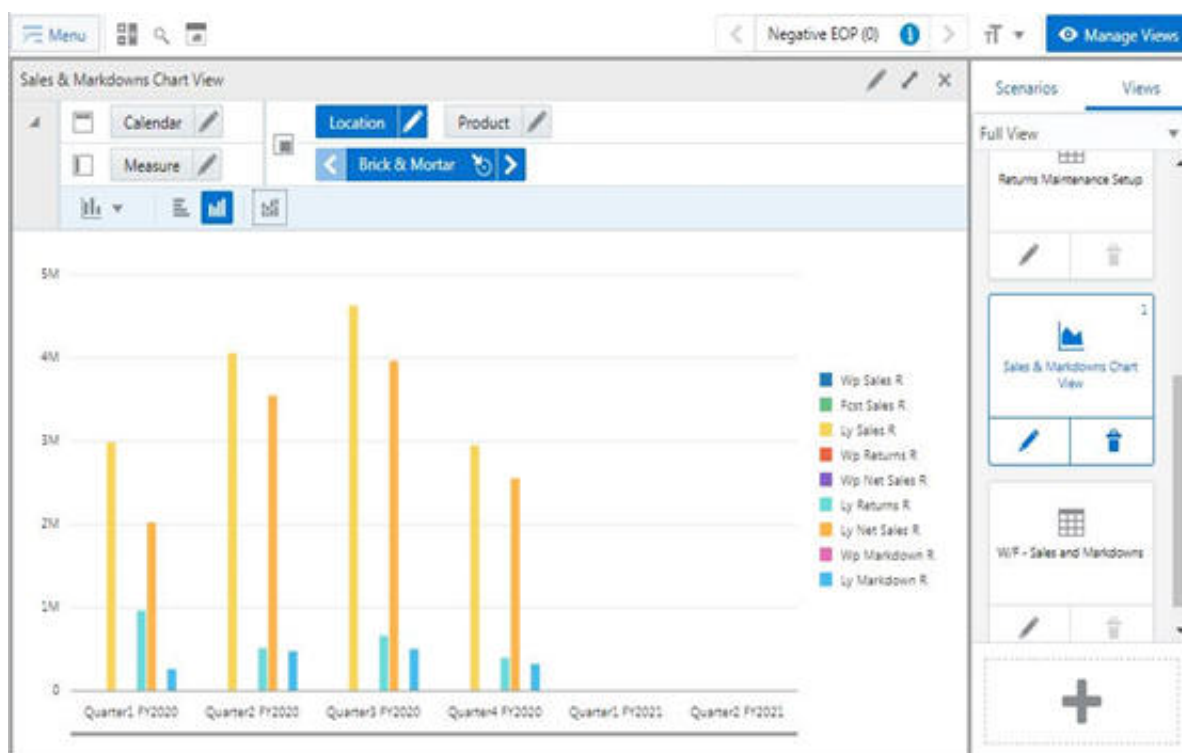


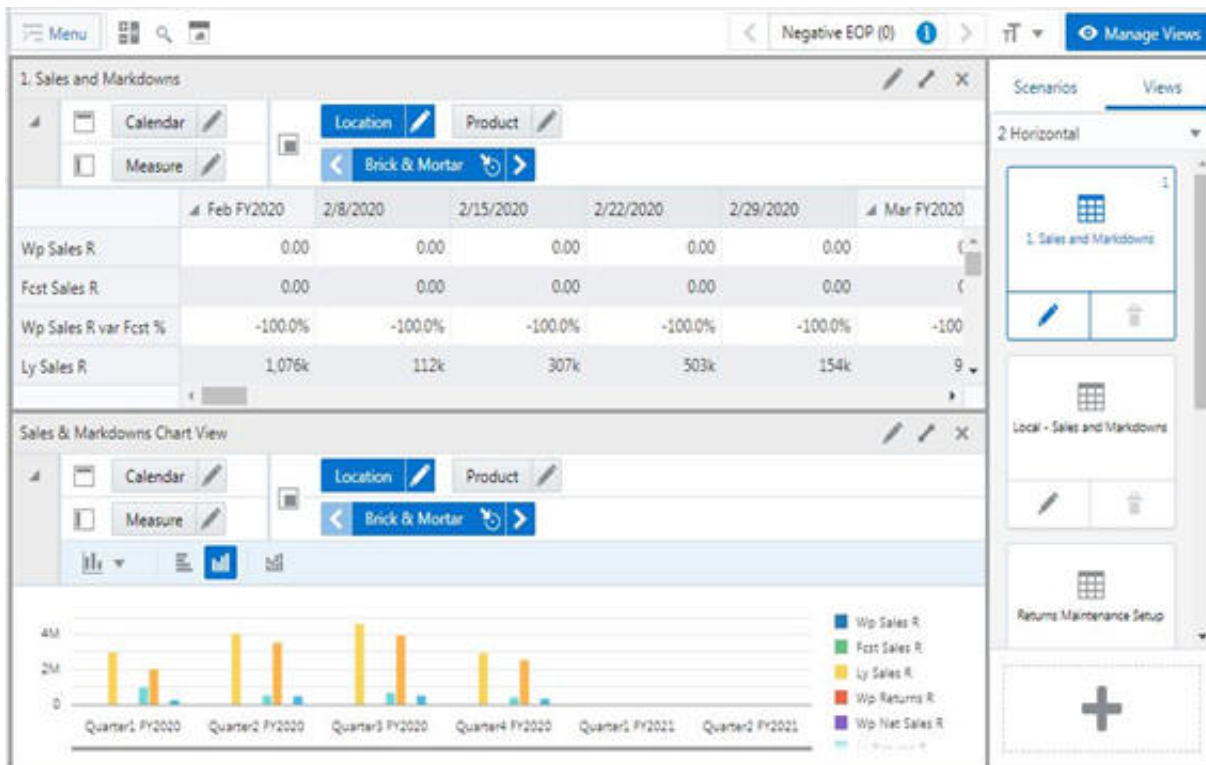
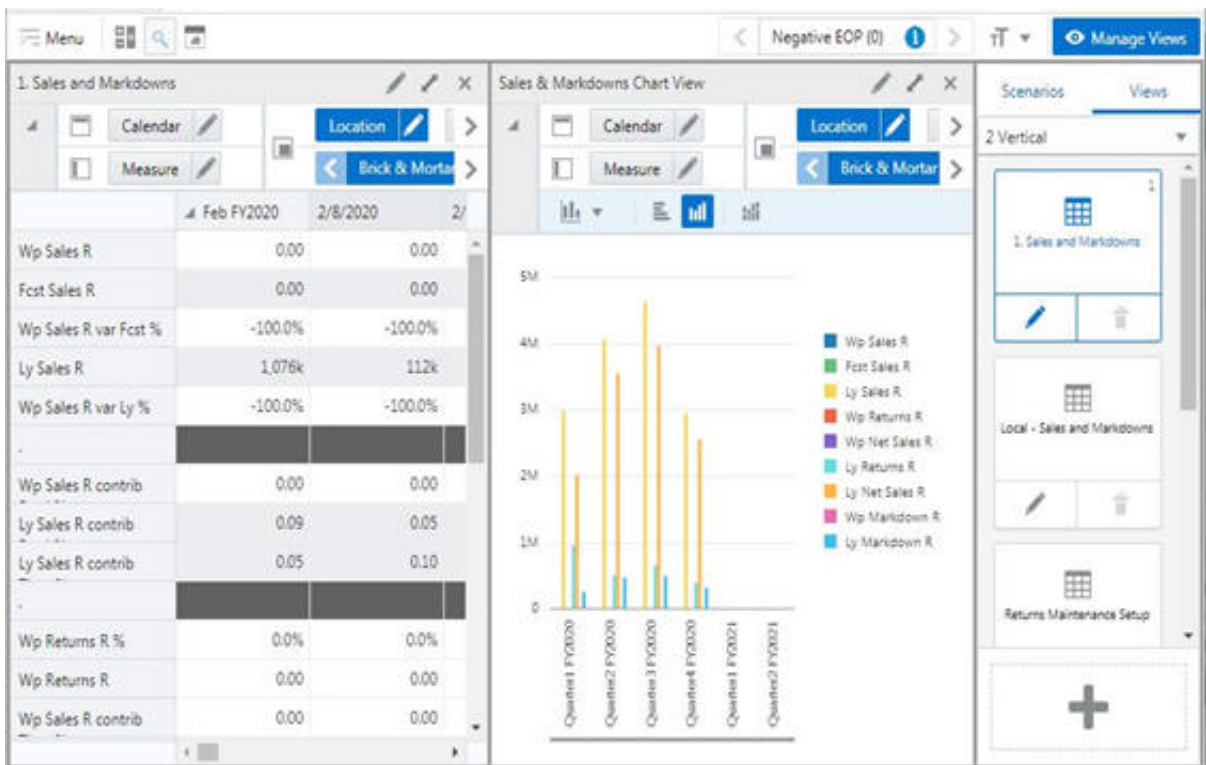
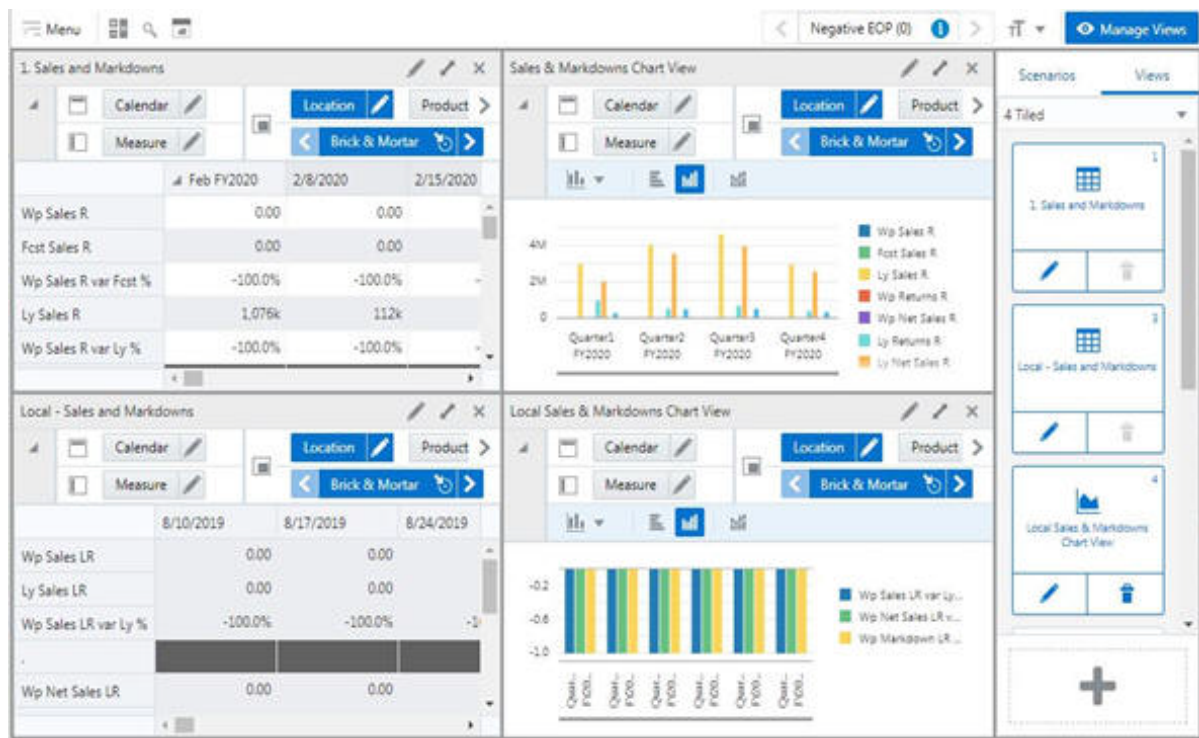
Figure 9–2 Chart in 2-Horizontal View Mode**Figure 9–3 Chart in 2-Vertical View Mode**

Figure 9-4 Chart in 4-Tiled View Mode

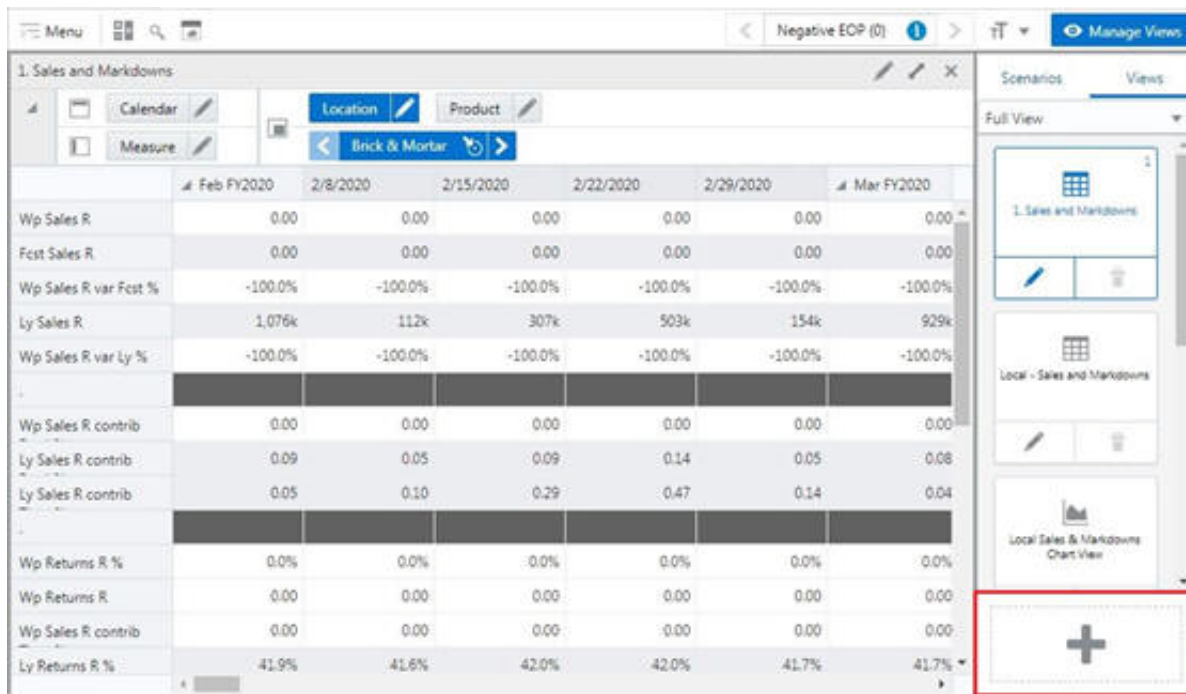


Creating a Chart

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.

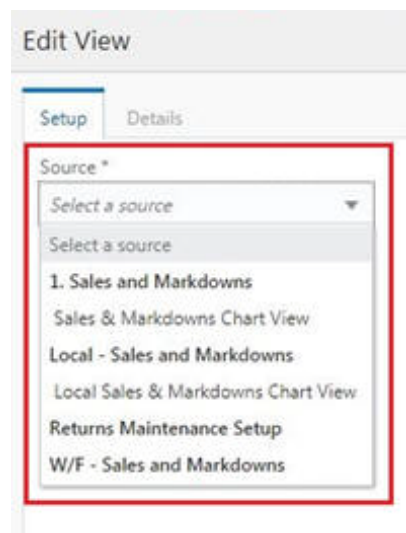
1. Click **Plus** in the View Management Drawer.

Figure 9–5 Creating a Chart

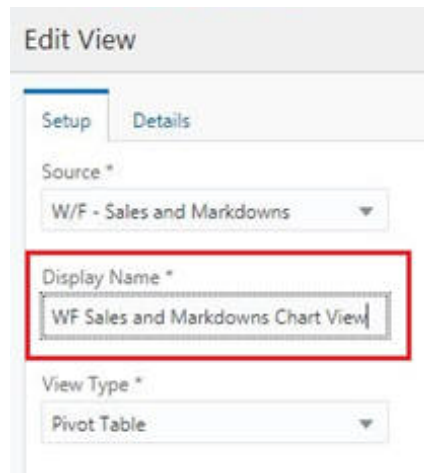


2. In Edit View, **Select a Source** and select from the existing views. This example uses Sales and Markdowns as the source. All data that exists in the Sales and Markdowns view is available in the new chart view being created.

Figure 9–6 Select a Source

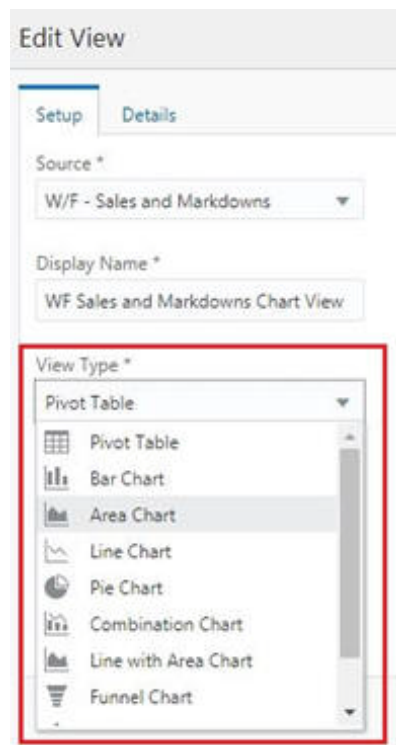


3. In the Edit View dialog box, enter a name for the new view. Here, it is a name similar to the source.

Figure 9–7 New View Name

The screenshot shows the 'Edit View' dialog box with the 'Setup' tab selected. The 'Source' dropdown is set to 'W/F - Sales and Markdowns'. The 'Display Name' text box is highlighted with a red rectangle and contains the text 'WF Sales and Markdowns Chart View'. The 'View Type' dropdown is set to 'Pivot Table'.

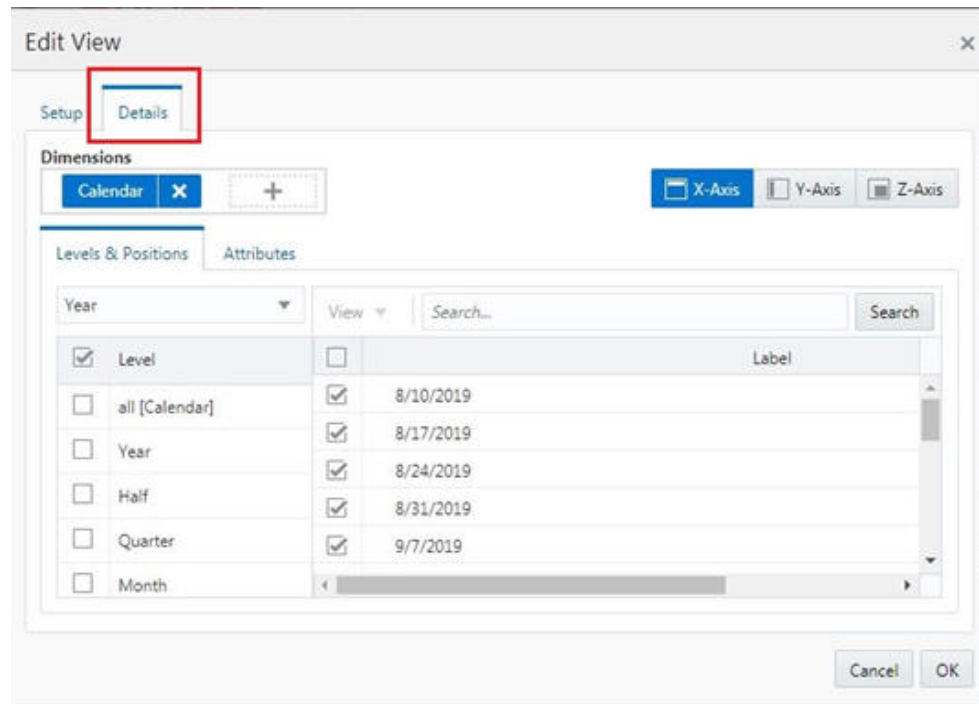
4. Select the type of chart from the drop-down list.

Figure 9–8 Chart Type

The screenshot shows the 'Edit View' dialog box with the 'Setup' tab selected. The 'Source' dropdown is set to 'W/F - Sales and Markdowns'. The 'Display Name' text box contains the text 'WF Sales and Markdowns Chart View'. The 'View Type' dropdown is open, showing a list of chart types. The 'Area Chart' option is highlighted with a red rectangle.

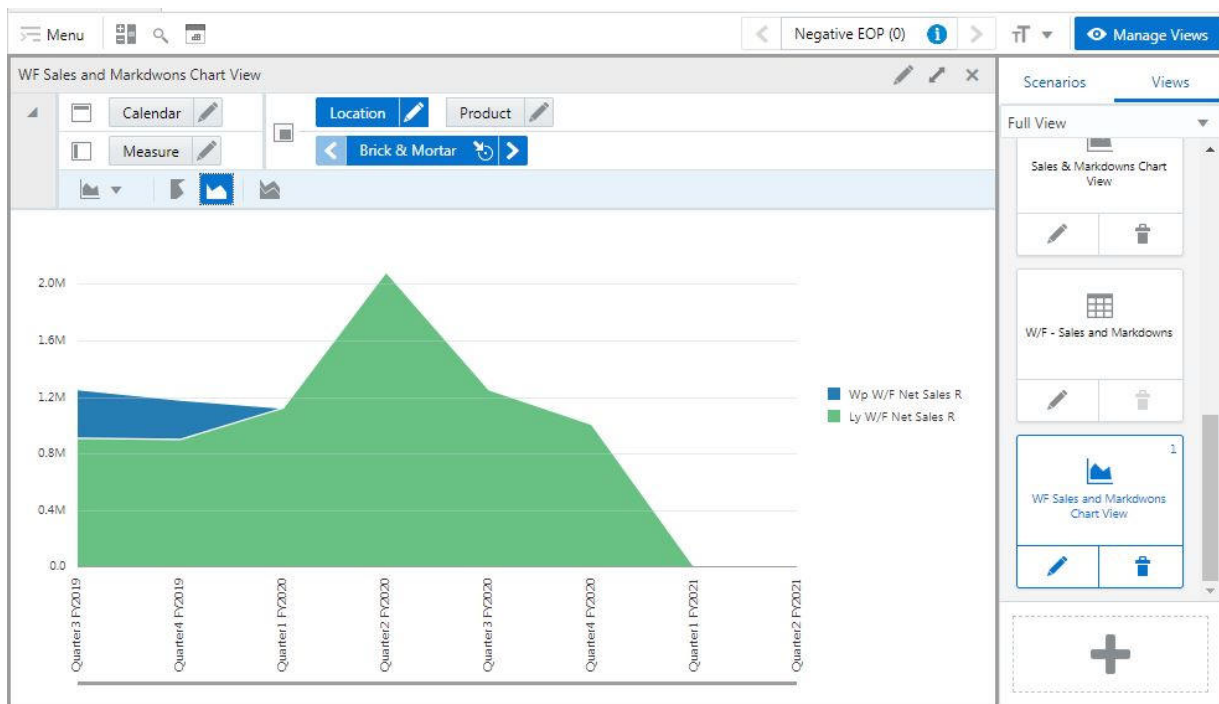
5. Click the **Details** tab to add, remove, or rearrange any levels or positions on the chart and click **OK**.

Figure 9–9 Chart Details



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

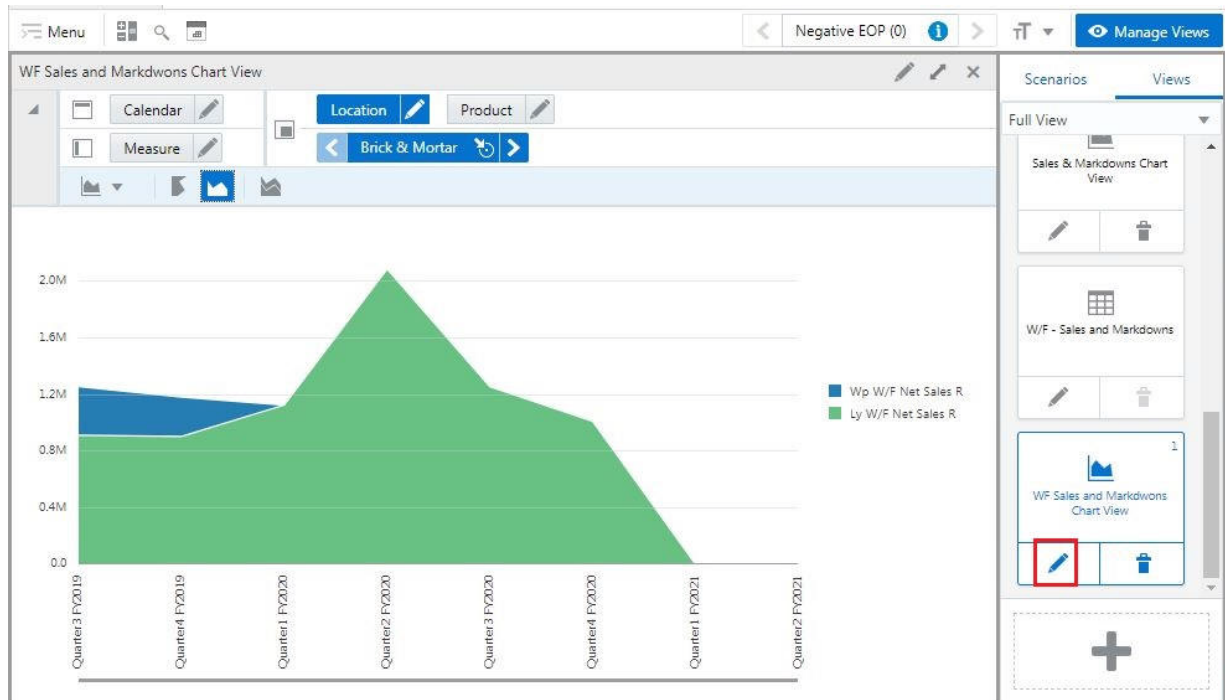
Figure 9–10 Chart View Tile



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."](#)

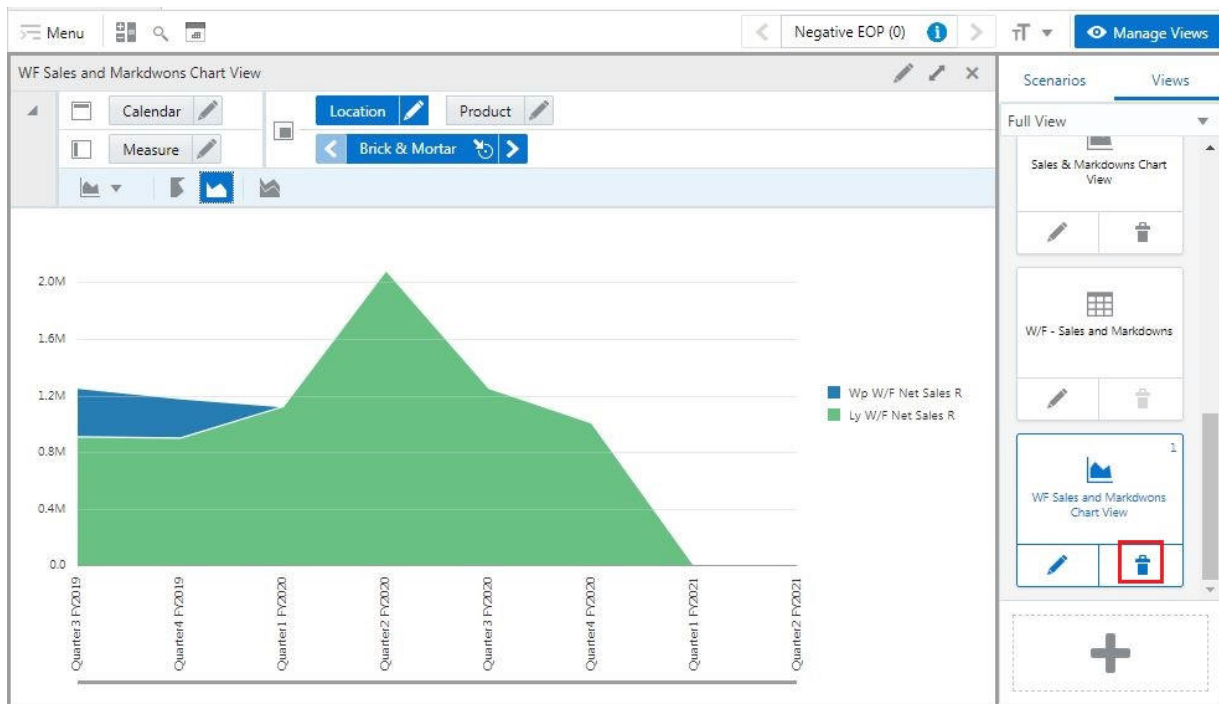
Figure 9–11 *Customize a Chart*



Deleting a Chart

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

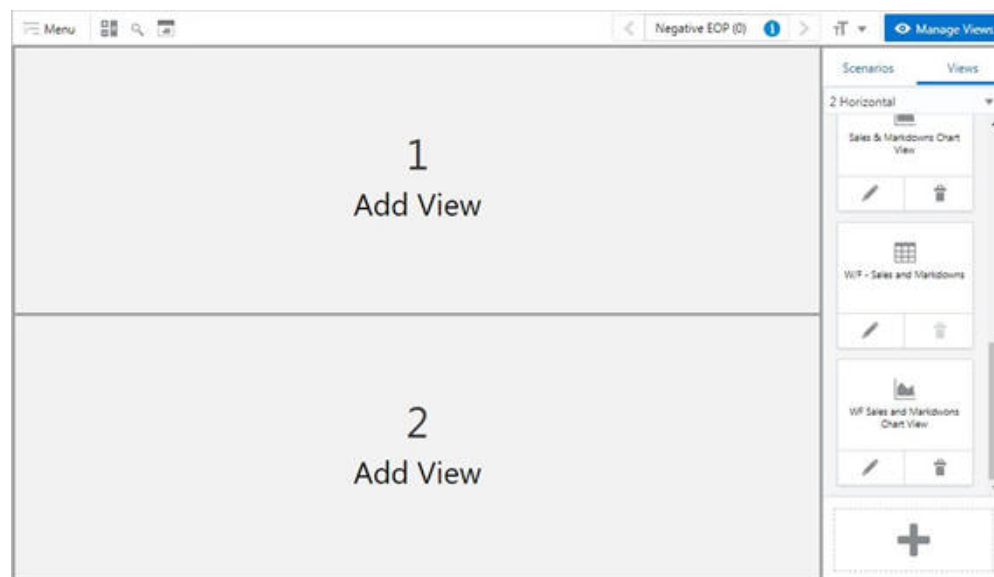
Click **Delete** on the chart view in the View Management Drawer:

Figure 9–12 Deleting a Chart

Synchronize Z Axis with Charts

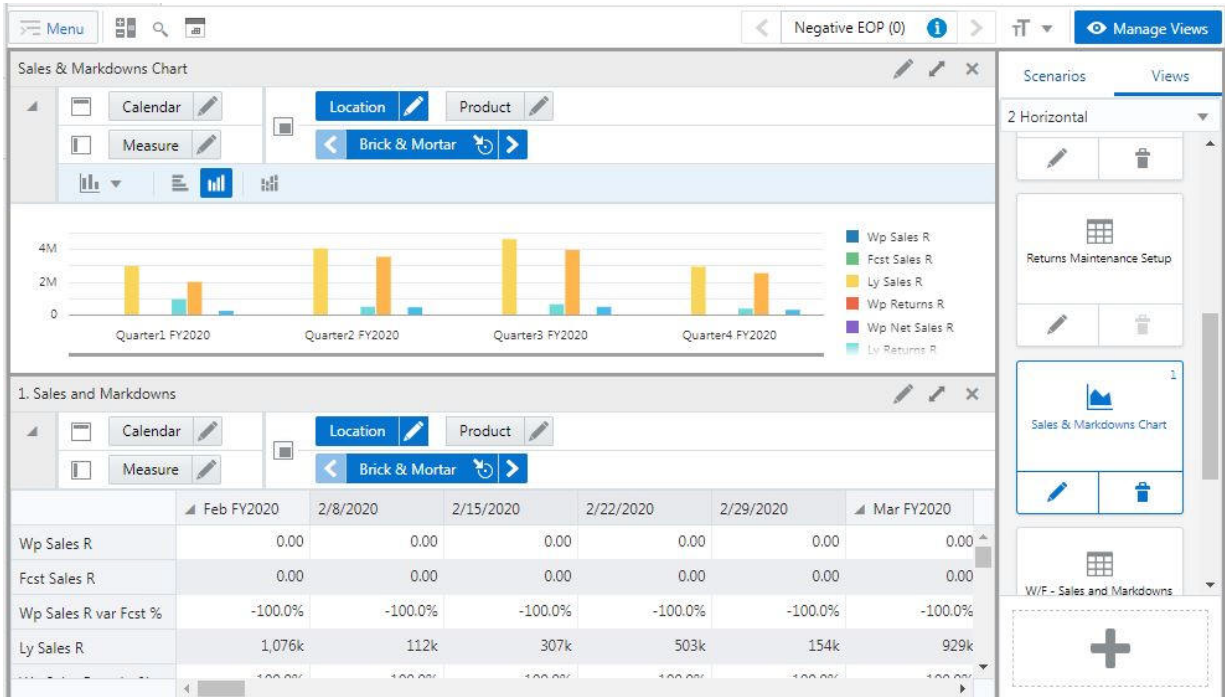
It can be helpful to have a pivot table view and a chart view open at the same time to make changes to the pivot table values and see the results in the chart value. By enabling the Synchronize Z Axis button with both views displayed, you can scroll through positions on the Z axis, and both views will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

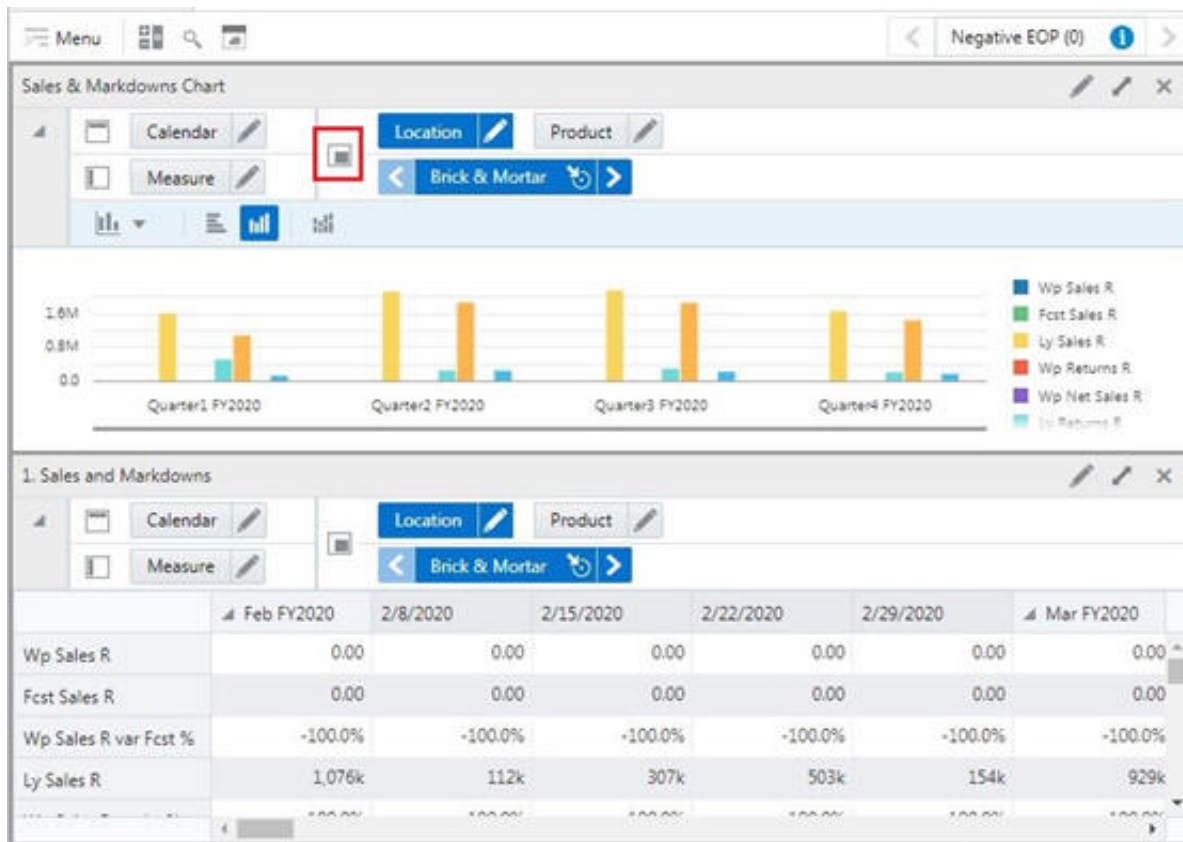
Figure 9–13 View Layout

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

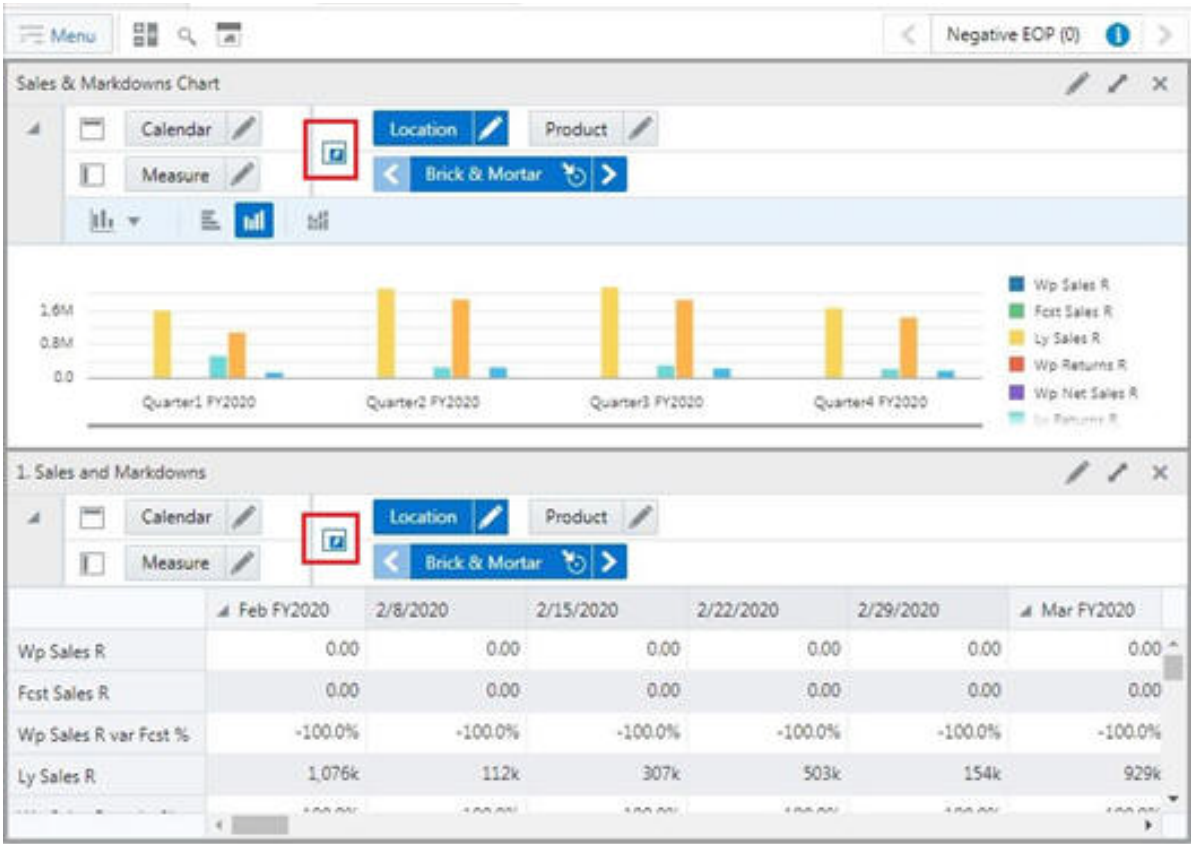


3. Click **Synchronize Z Axis** to activate it.

Figure 9–15 Activate Synchronize Z Axis

- 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.

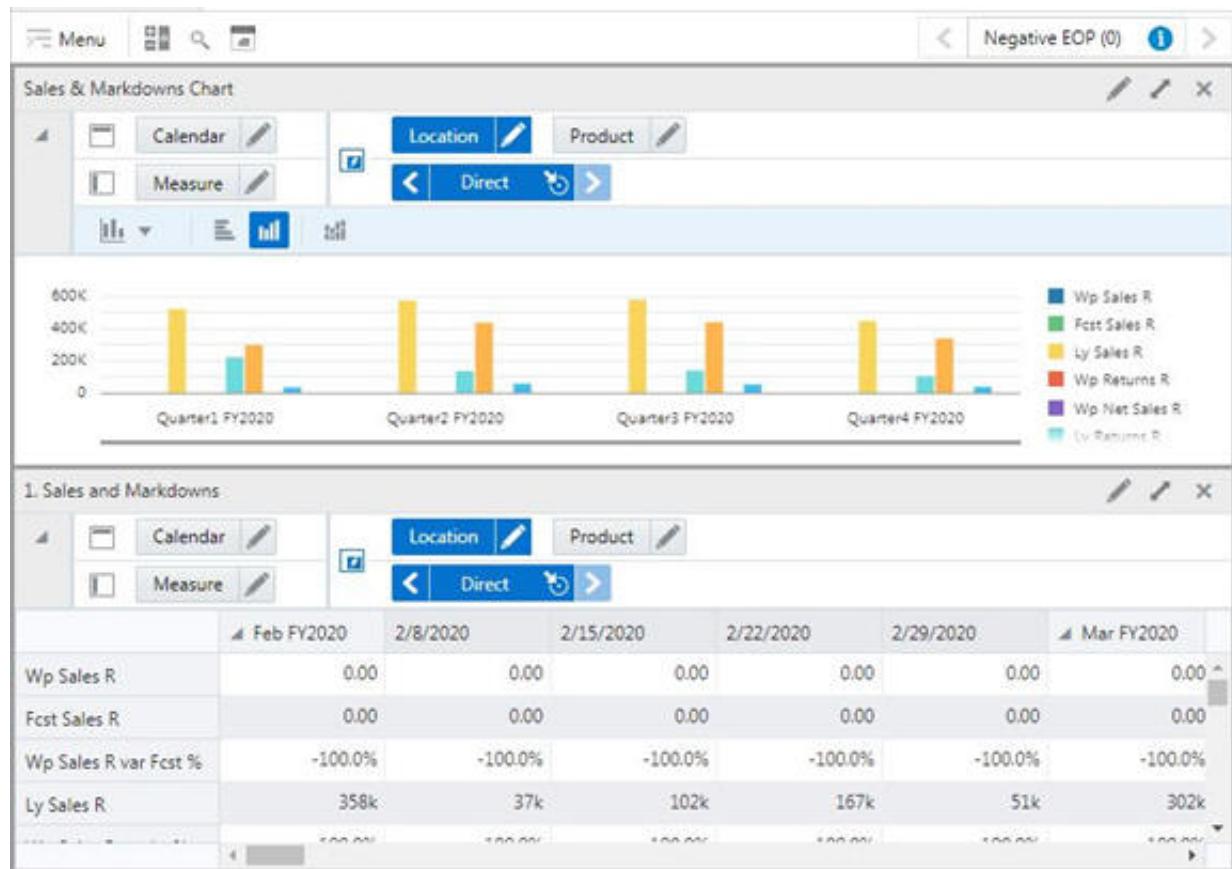
Figure 9–17 Location Position

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

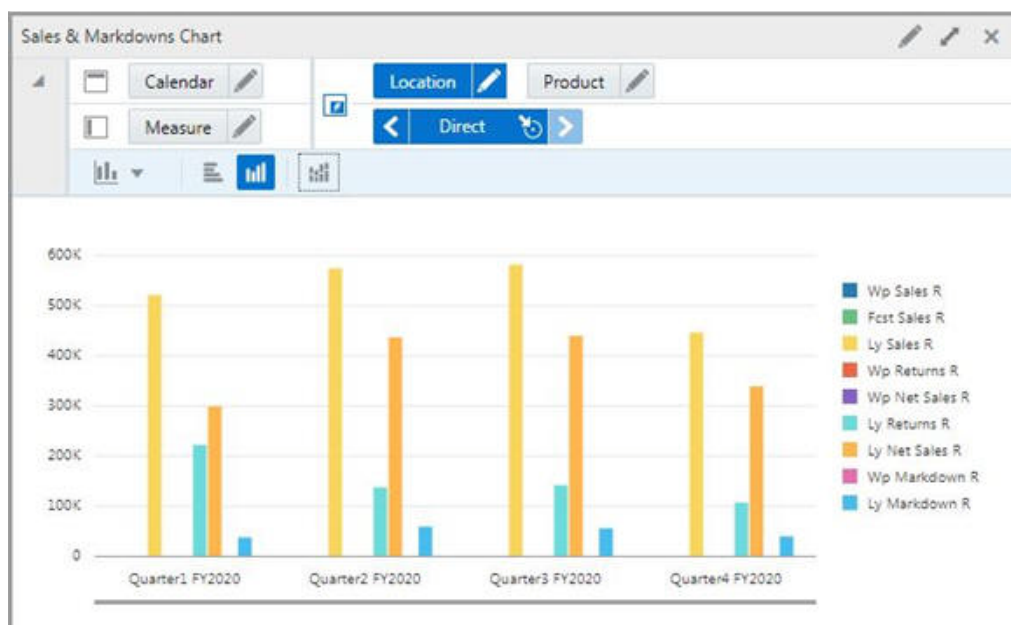
A multi-series chart shows multiple series of data. Here are two examples.

- 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

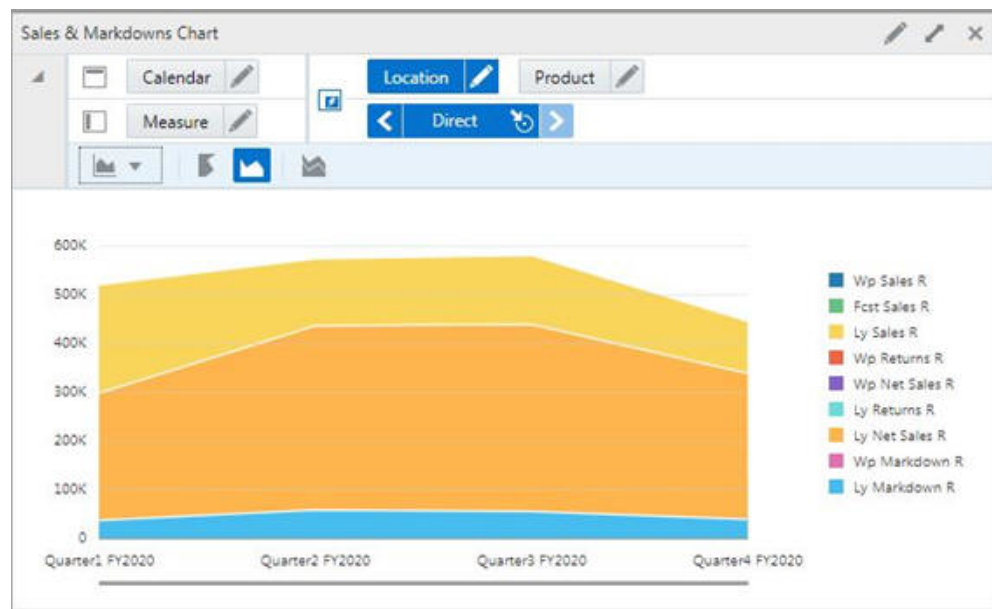
In a Bar Chart, the data is represented as a series of vertical or horizontal bars. It can be used to examine trends over time or compare items at the same time (for example, sales for different products in different quarters).

Figure 9–18 Bar Chart



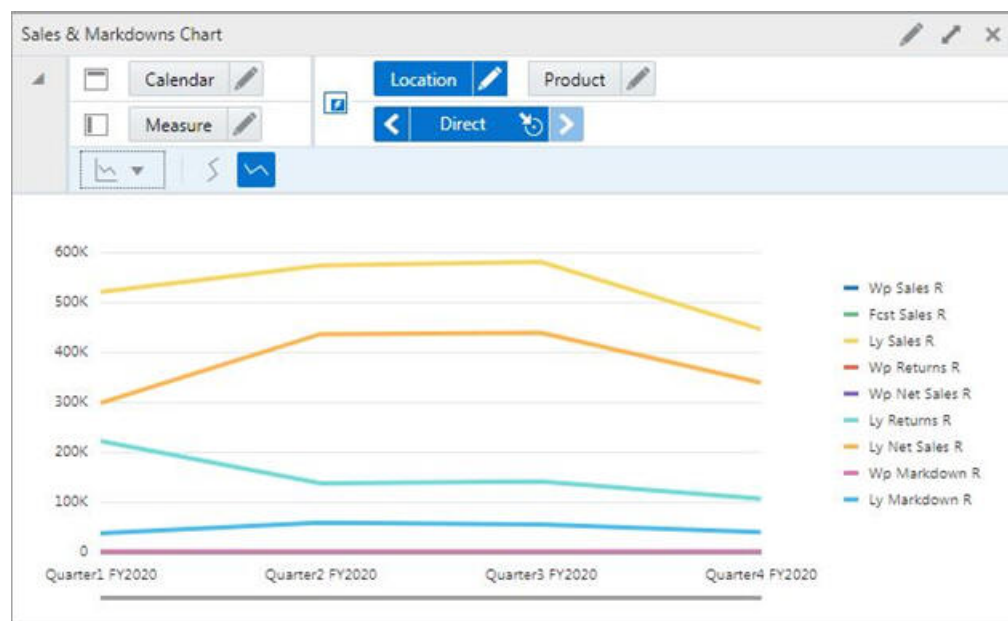
Area Chart

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

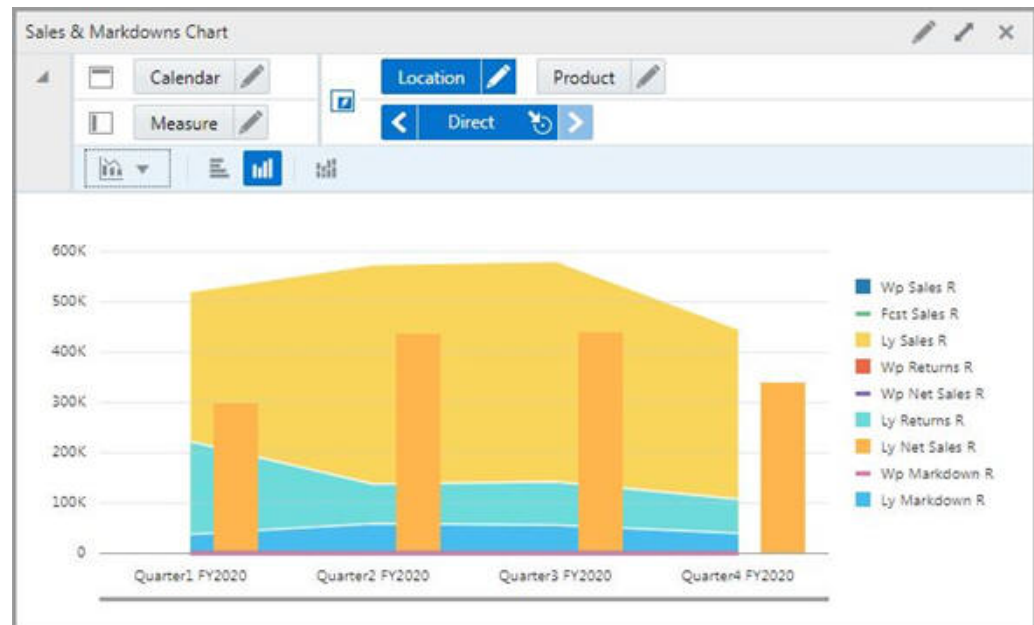
Line Chart

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.

Figure 9–20 Line Chart

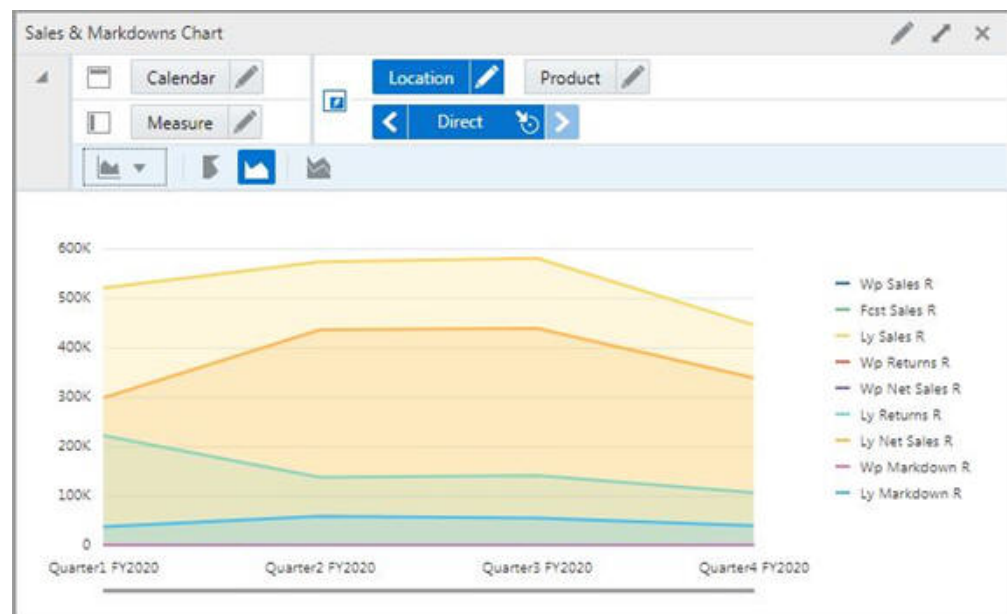
Combination Chart

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 9–21 Combination Chart

Line with Area Chart

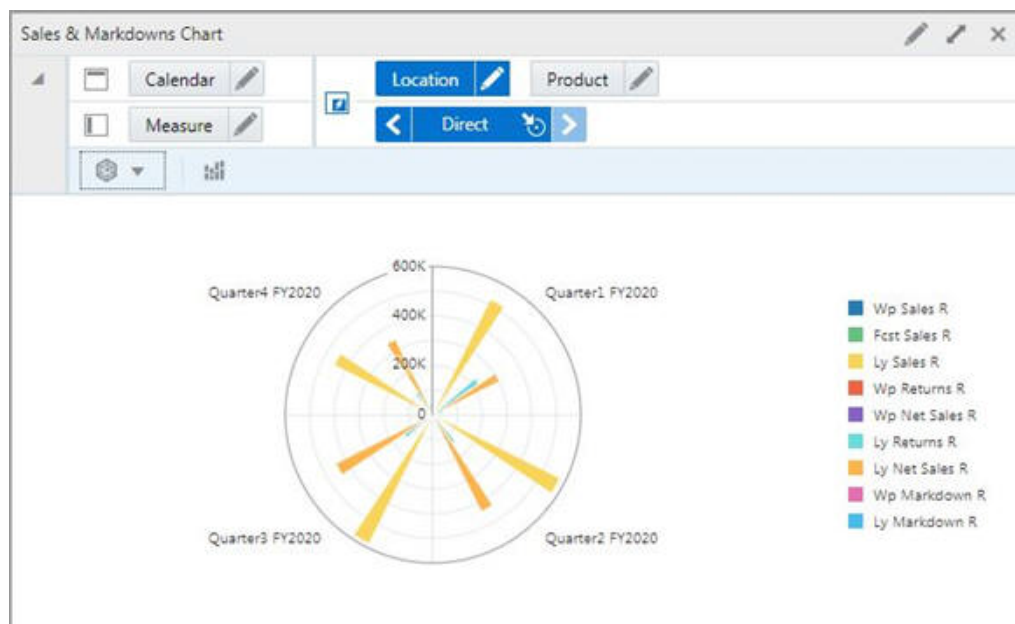
Line with Area Chart is a combination of Line Chart and Area Chart. In a Line with Area Chart, the data is represented as a line, series of data points, or data points connected by a line, with a filled-in area. Line with Area Charts require data for at least two points for each member in a group.

Figure 9–22 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.

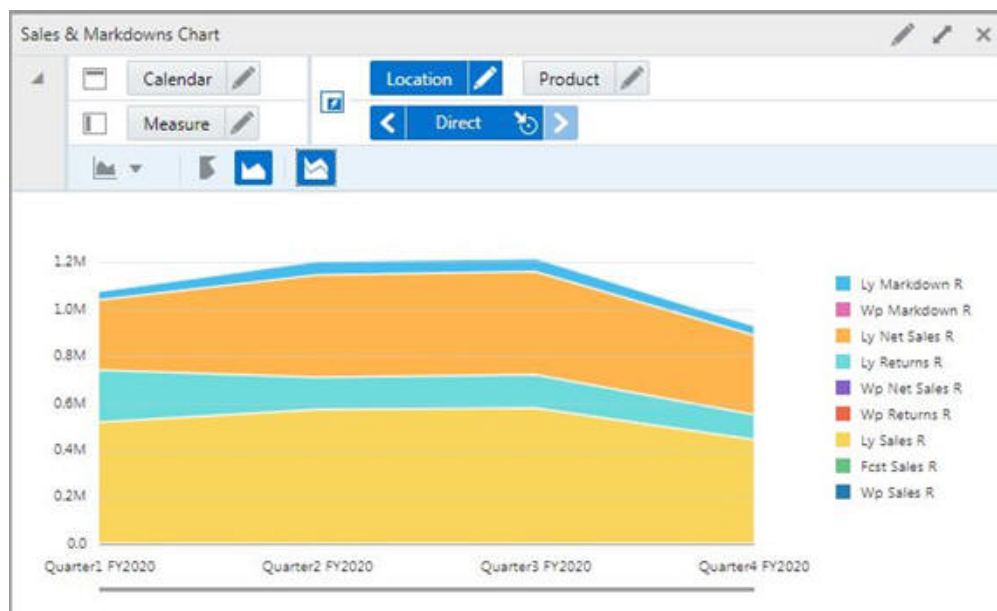
Figure 9–23 Polar Chart



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 9–24 Stacked Area Chart



Single Series Charts

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

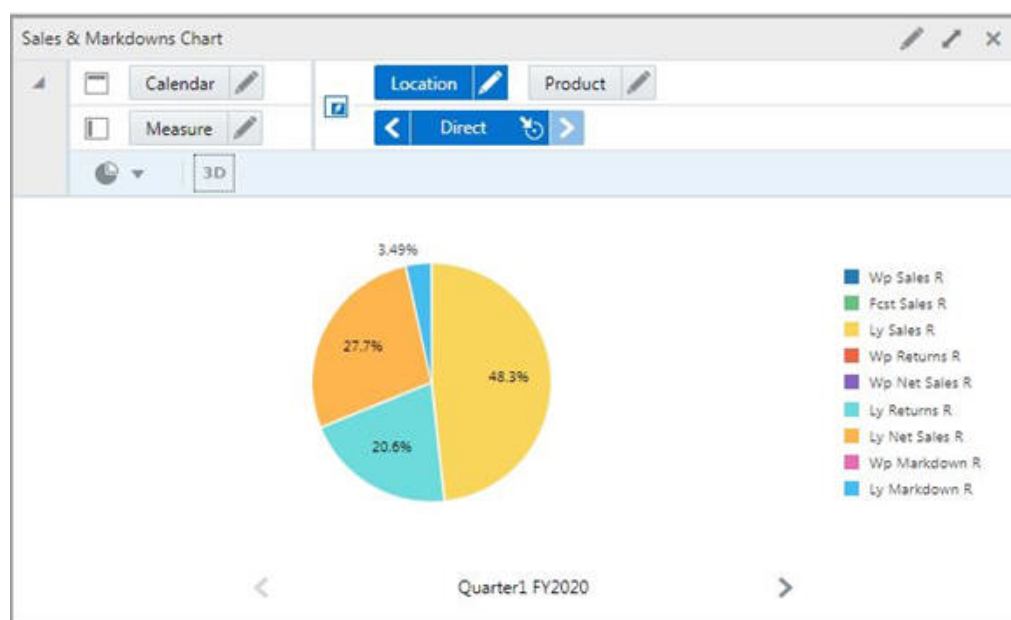
- Regular sales for one store over time. A multiple-series chart shows multiple series, or sets, of data.
- Regular sales for ten different stores over time.

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.

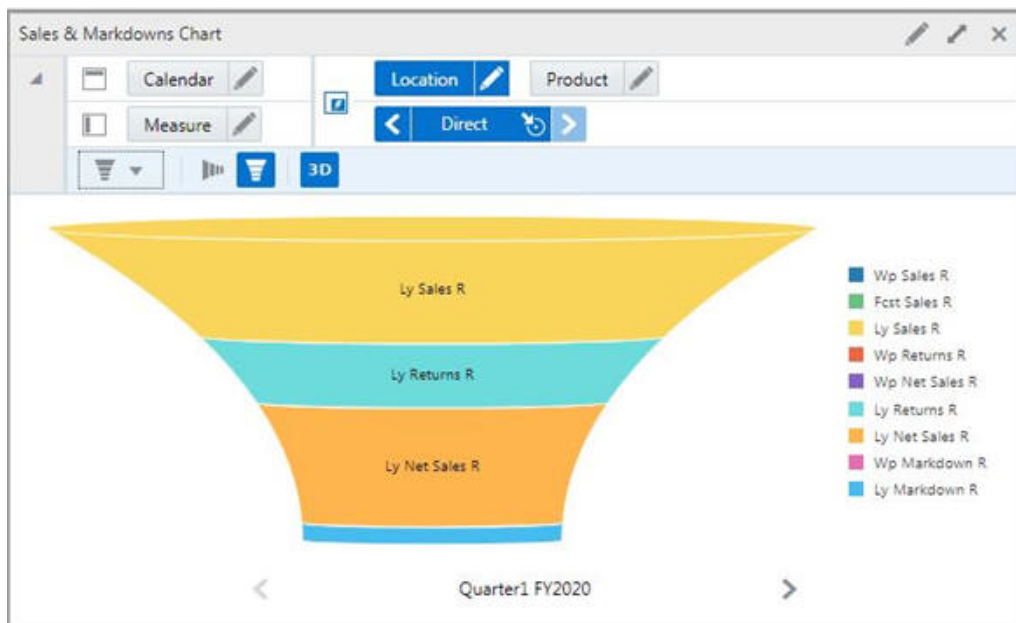
In [Figure 9–25](#), because this is a single-series chart, only one quarter is shown at a time.

Figure 9–25 *Pie Chart*



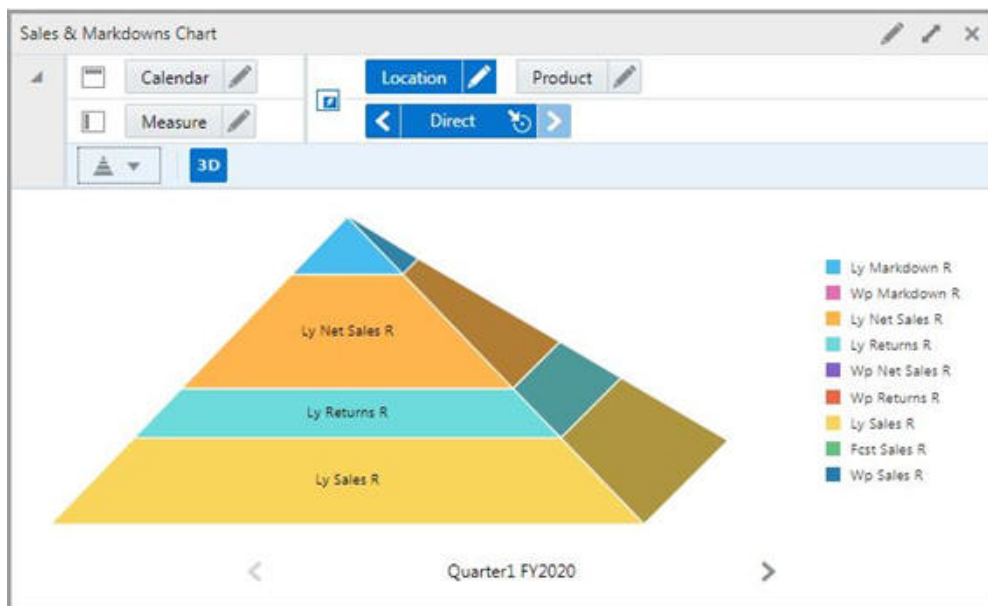
Funnel Chart

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 9–26 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.

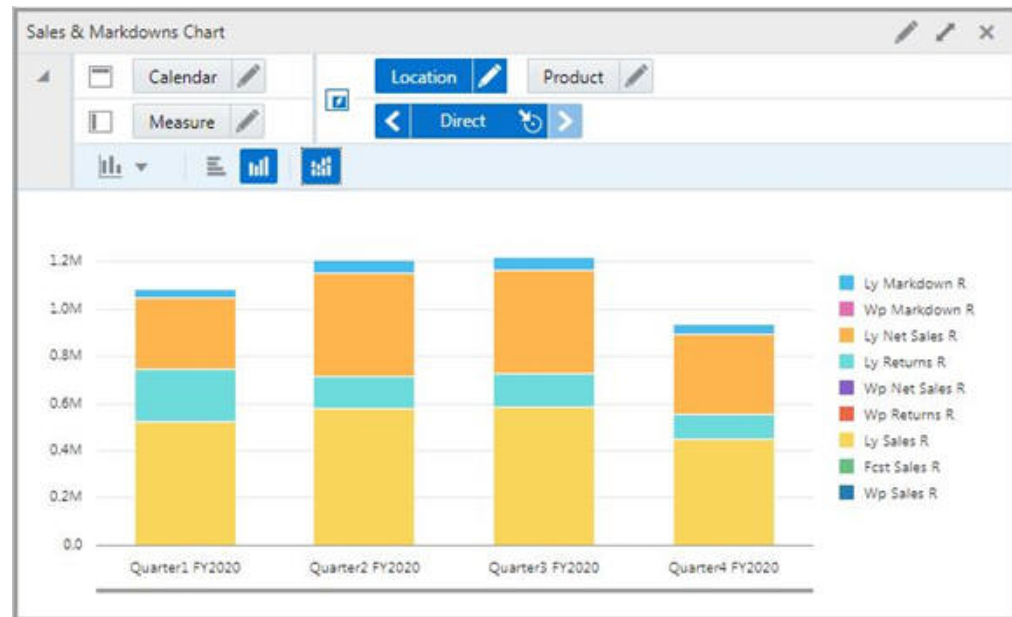
Figure 9–27 Pyramid Chart

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:

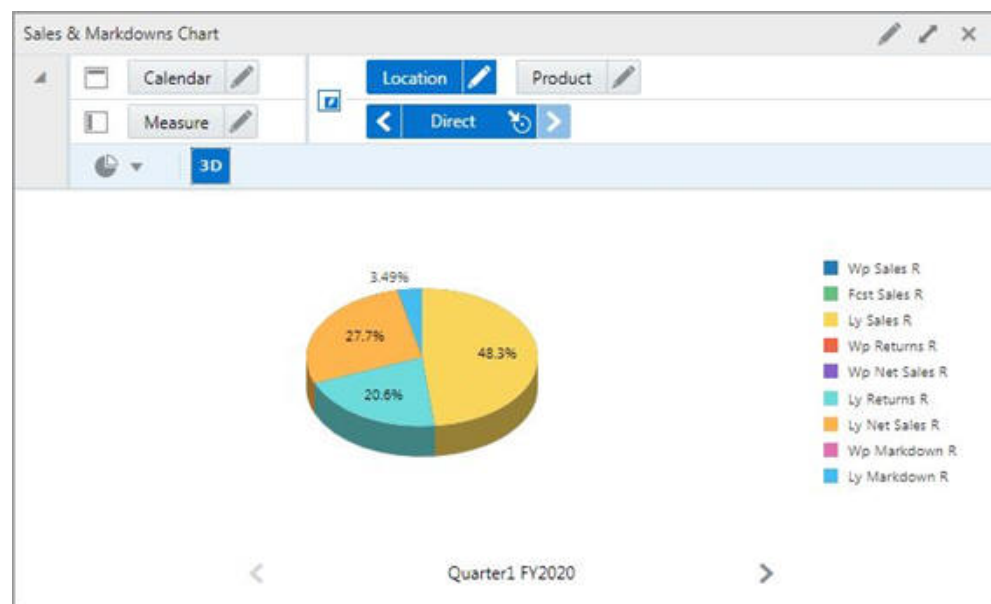
- Stacked charts help in displaying the cumulative magnitude of two or more data series. They are useful in representing a data value as a sum of two or more values. Each data series can be distinguished by the color of its section in the stack.

Figure 9–28 Stacked Chart



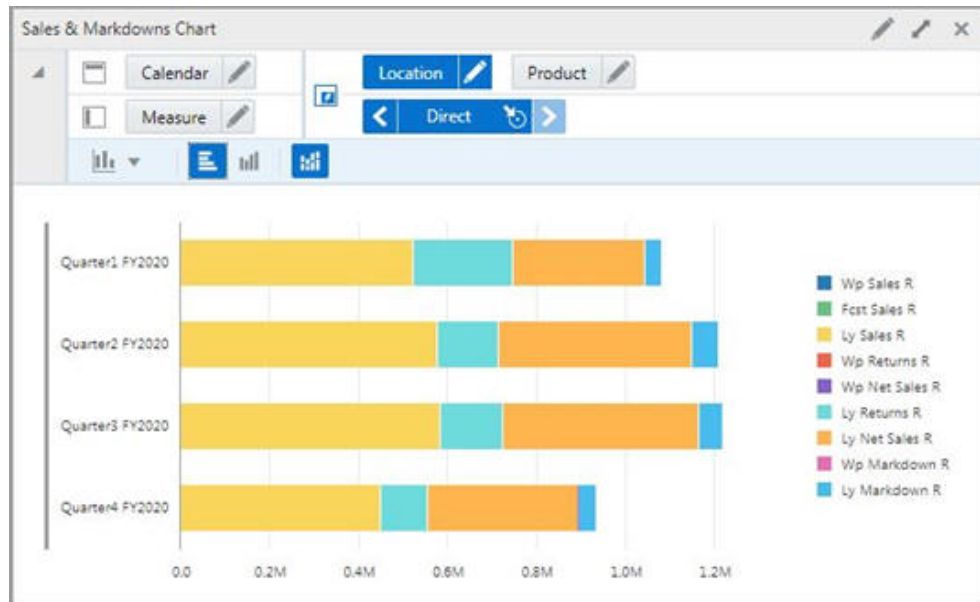
- 3-D charts rotate the chart into a 3-D display.

Figure 9–29 3-D Chart



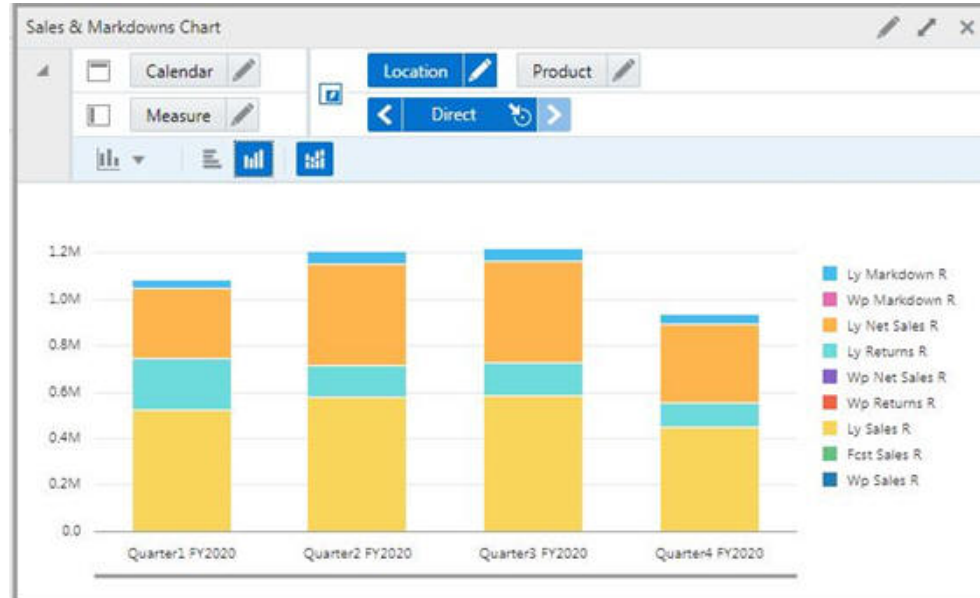
- The horizontal button rotates the chart from vertical to horizontal.

Figure 9–30 Horizontal Chart

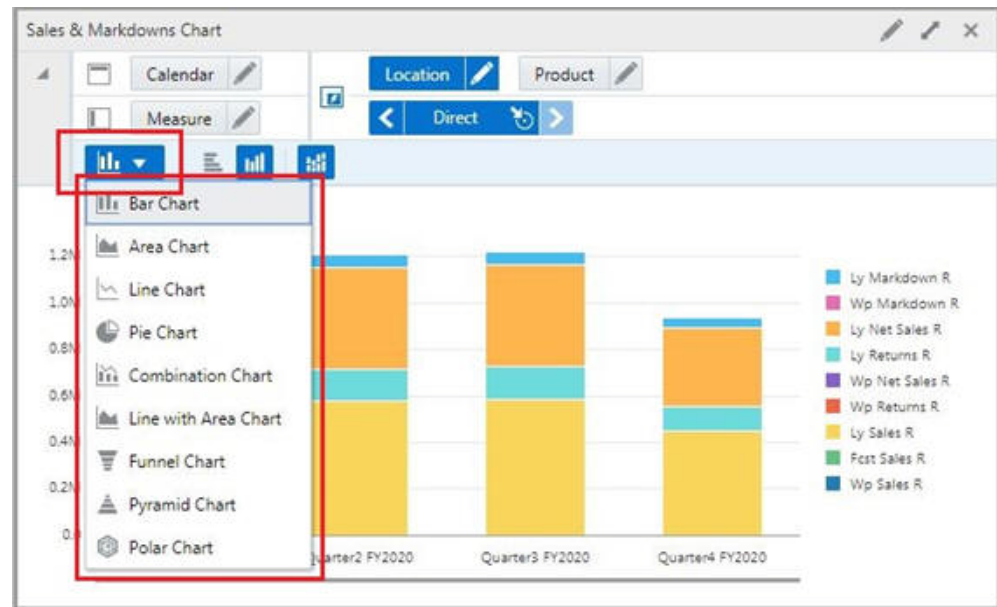


- The vertical button rotates the chart from vertical to horizontal.

Figure 9–31 Vertical Chart

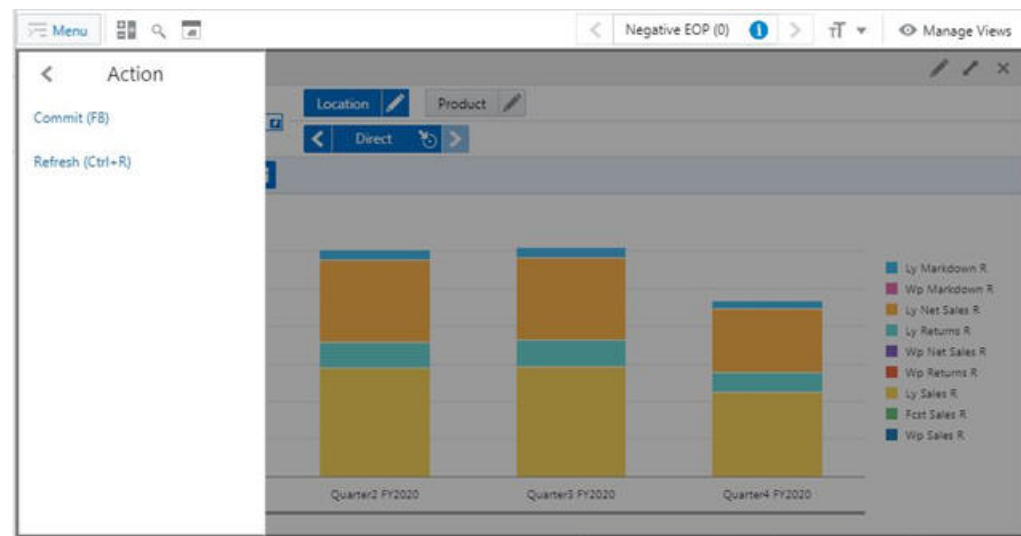


- The Change Chart Type button allows you to quickly change the chart type to any of the other types not currently displayed.

Figure 9–32 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 9–33 Refresh Chart

10

Formatting

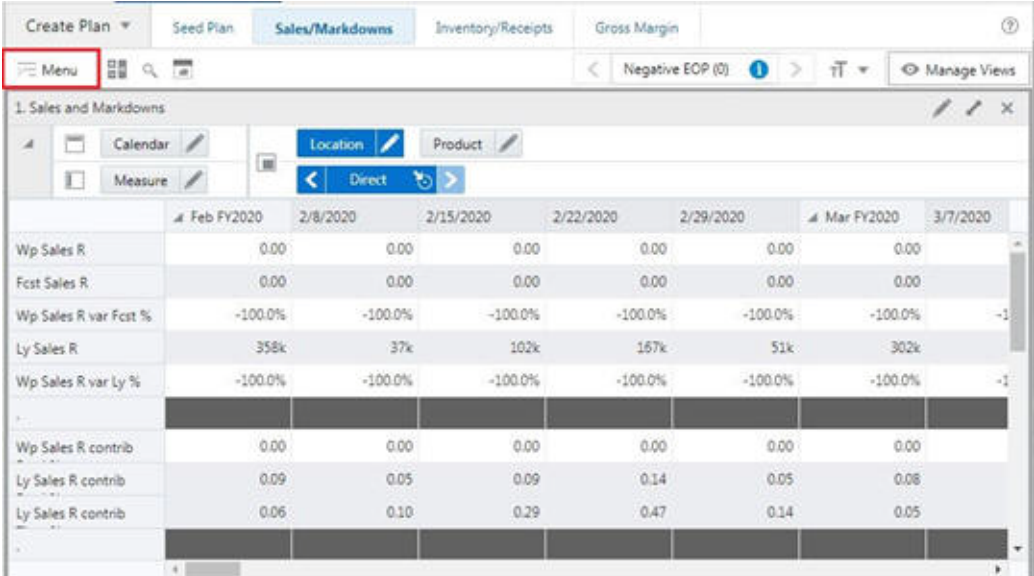
Using the Format functionality, you can set and clear formats that apply to measures, dimensions, and exceptions. You can make changes to single or multiple measures, dimensions, and exceptions and apply these changes across one, many, or all views in the workspace.

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



The screenshot shows a software interface with a 'Quick Access Toolbar' at the top. The 'Menu' button is highlighted with a red box. Below the toolbar, there is a 'Sales and Markdowns' view. The view includes a table with columns for dates and measures. The table data is as follows:

| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 | 2/29/2020 | Mar FY2020 | 3/7/2020 |
|-----------------------|------------|----------|-----------|-----------|-----------|------------|----------|
| Wp Sales R | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Fcst Sales R | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Wp Sales R var Fcst % | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | -1 |
| Ly Sales R | 358k | 37k | 102k | 167k | 51k | 302k | |
| Wp Sales R var Ly % | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | -1 |
| Wp Sales R contrib | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Ly Sales R contrib | 0.09 | 0.05 | 0.09 | 0.14 | 0.05 | 0.08 | |
| Ly Sales R contrib | 0.06 | 0.10 | 0.29 | 0.47 | 0.14 | 0.05 | |

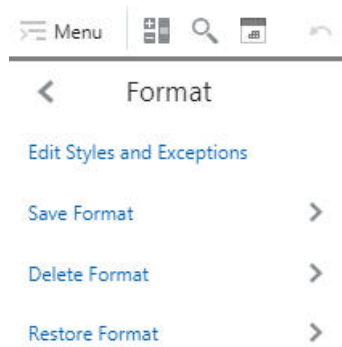
2. Click **Format** to open the Format menu.

Figure 10–2 Opening the Format Menu

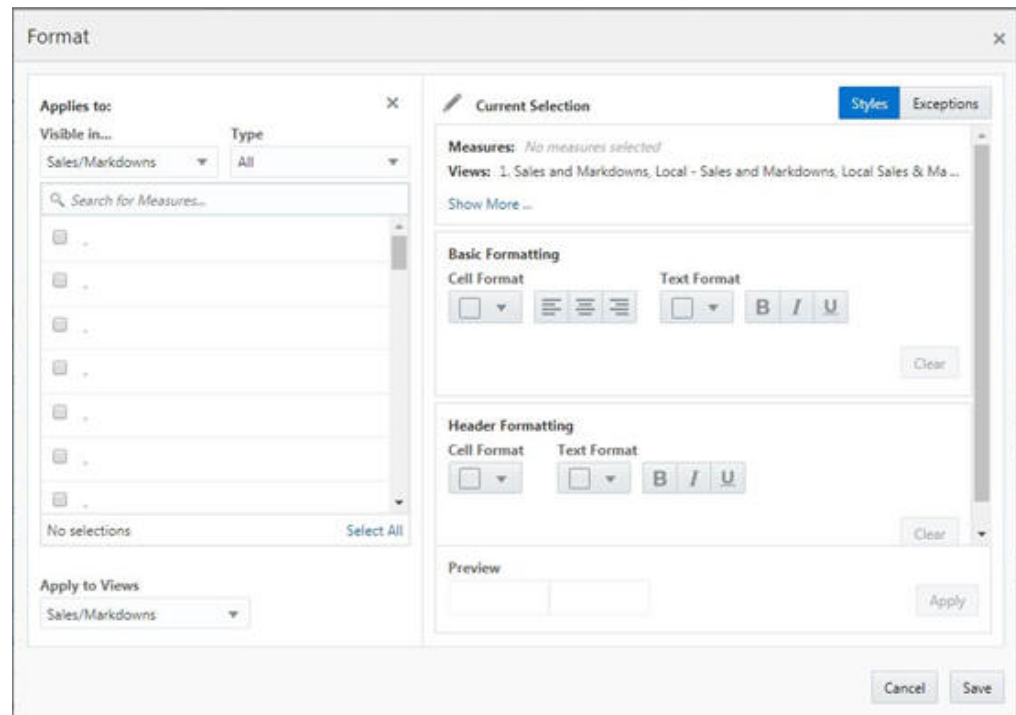


3. Click **Edit Styles and Exceptions** to open the Format dialog box.

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

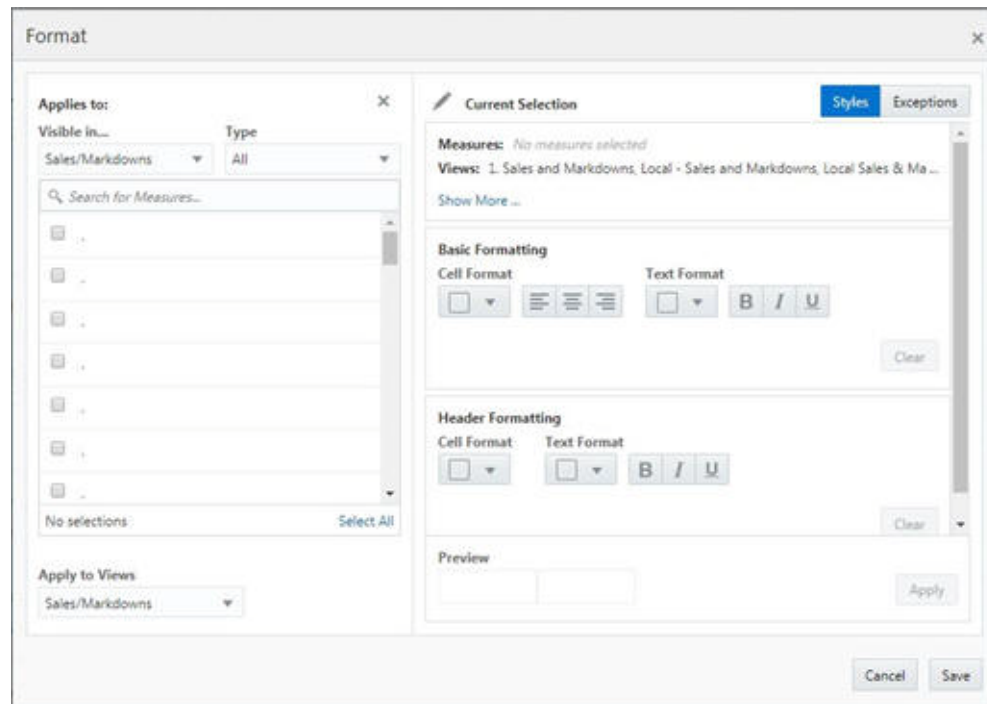
From the Styles tab of the Format dialog box, you can locate measures with the filter feature and then modify the measure style for those measures. Measures can be modified by altering the appearance of the headers or the cells.

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.

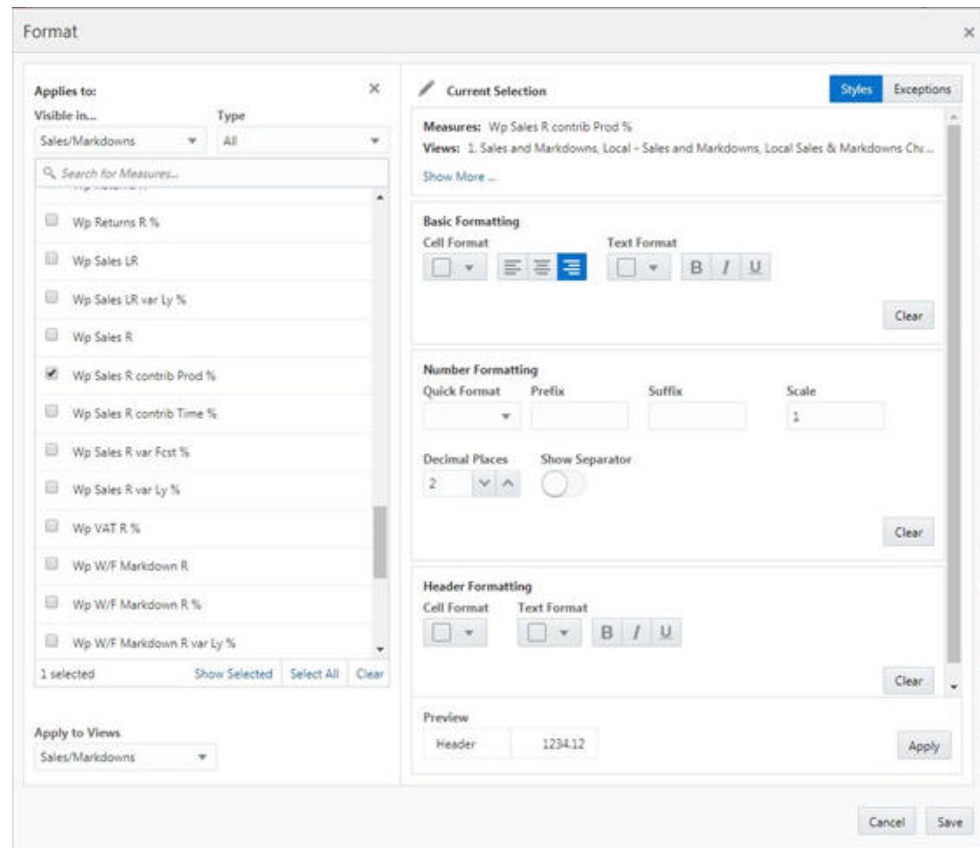
After you have found the measures you want to change, you can edit or clear the existing formats for those measures and add new ones.

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.

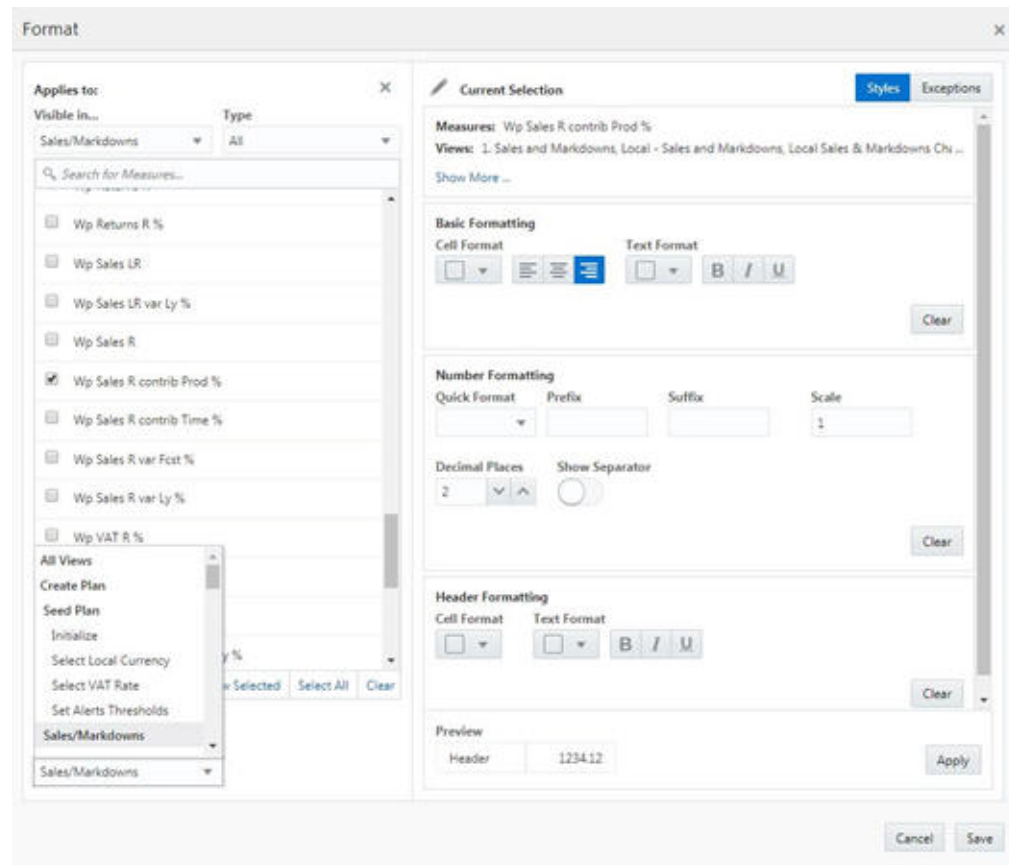
Figure 10–5 *Styles Tab*

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**.

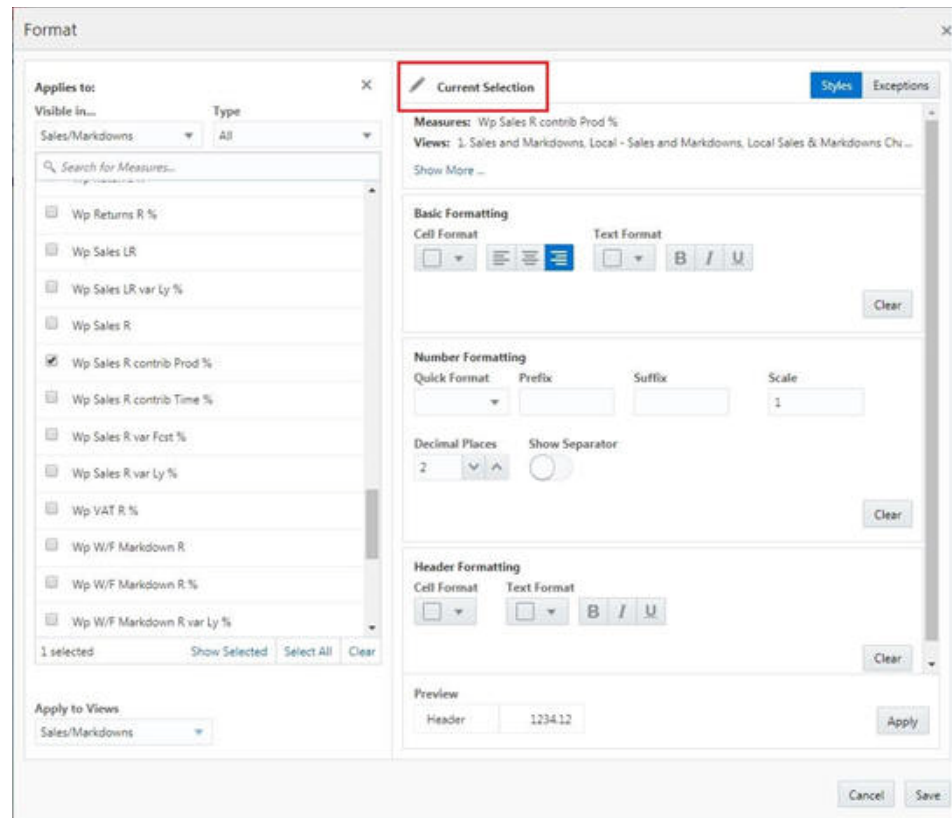
Figure 10–6 Filter to Alter Measure

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

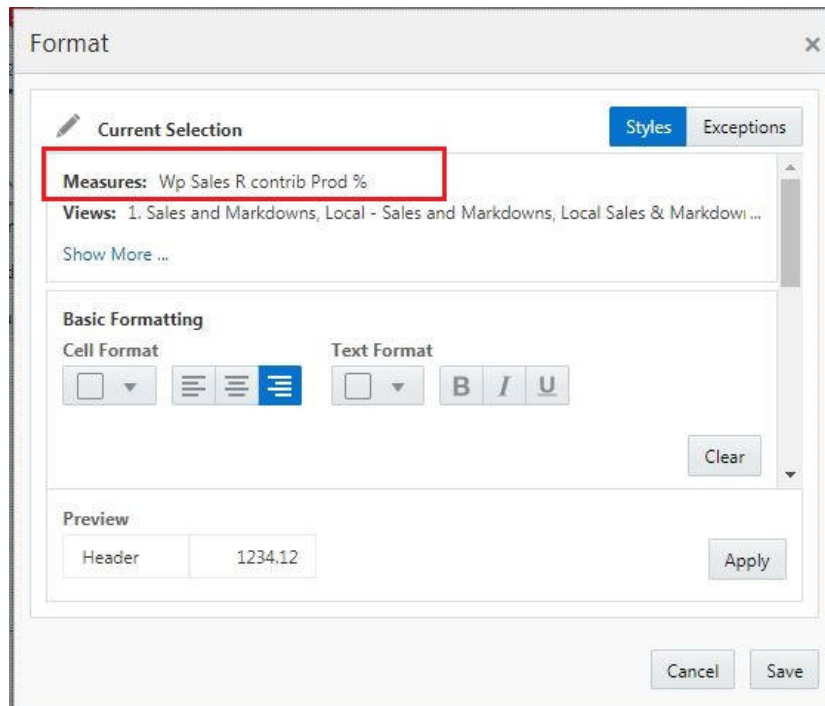
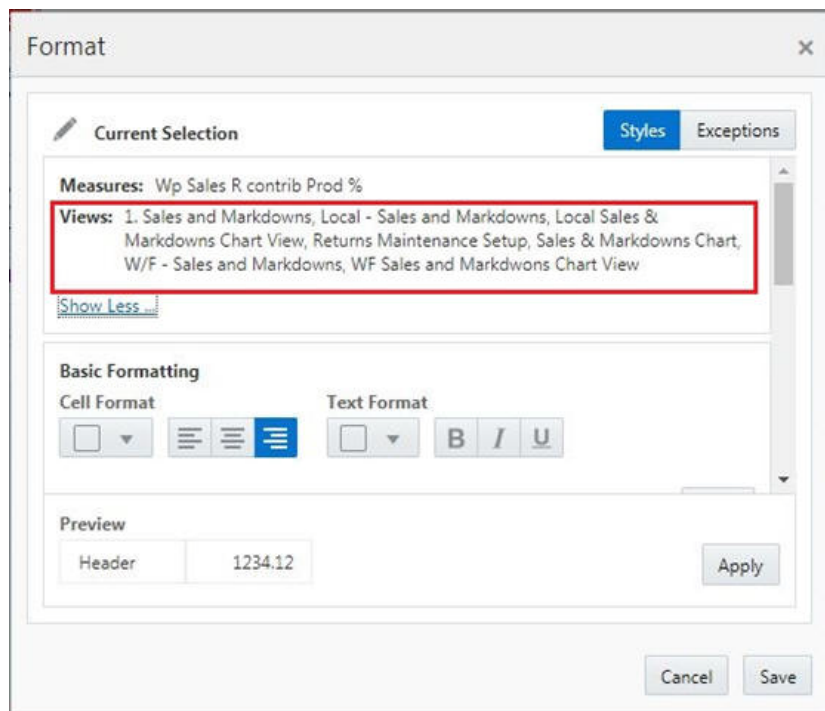
Figure 10–7 Applies To Field to Apply Formats



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.

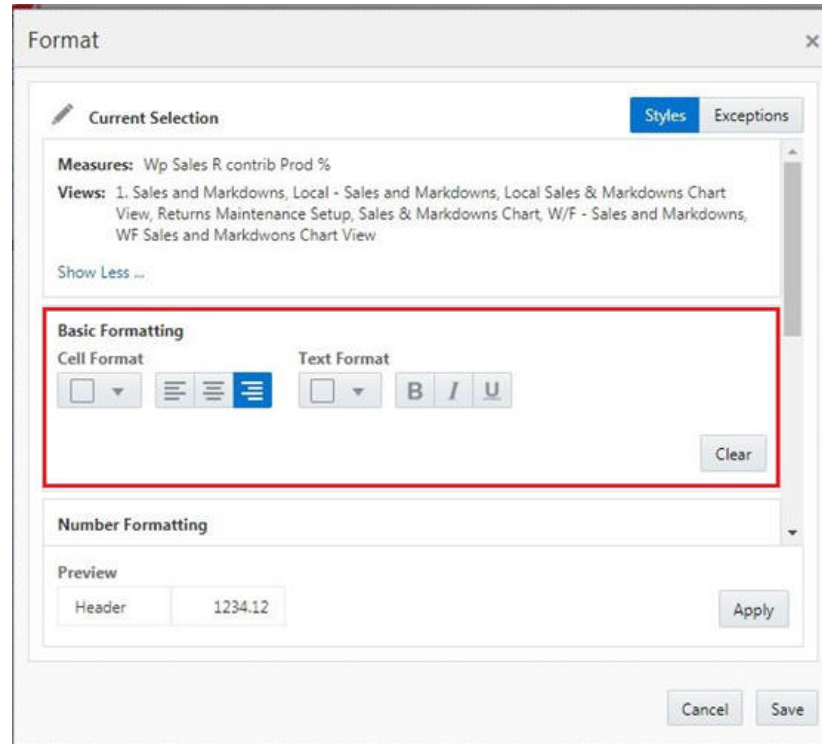
Figure 10–9 Selection Measure Summary**Figure 10–10 Selection Views**

6. The Basic Formatting section includes the following options:

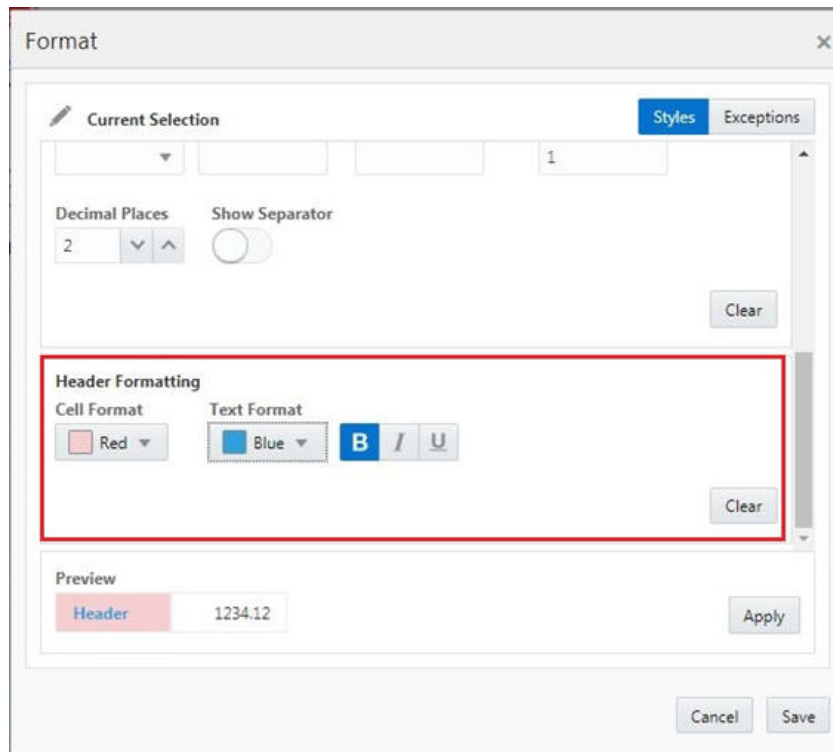
- Cell Format
- Text alignment
- Text Format

- Bold
- Italics
- Underline

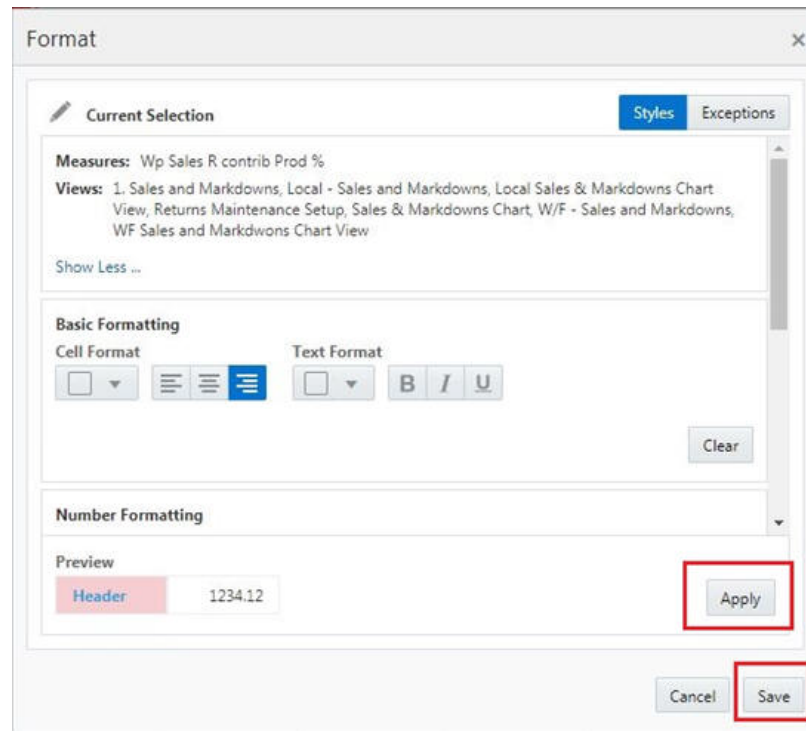
Figure 10–11 Basic Formatting Options



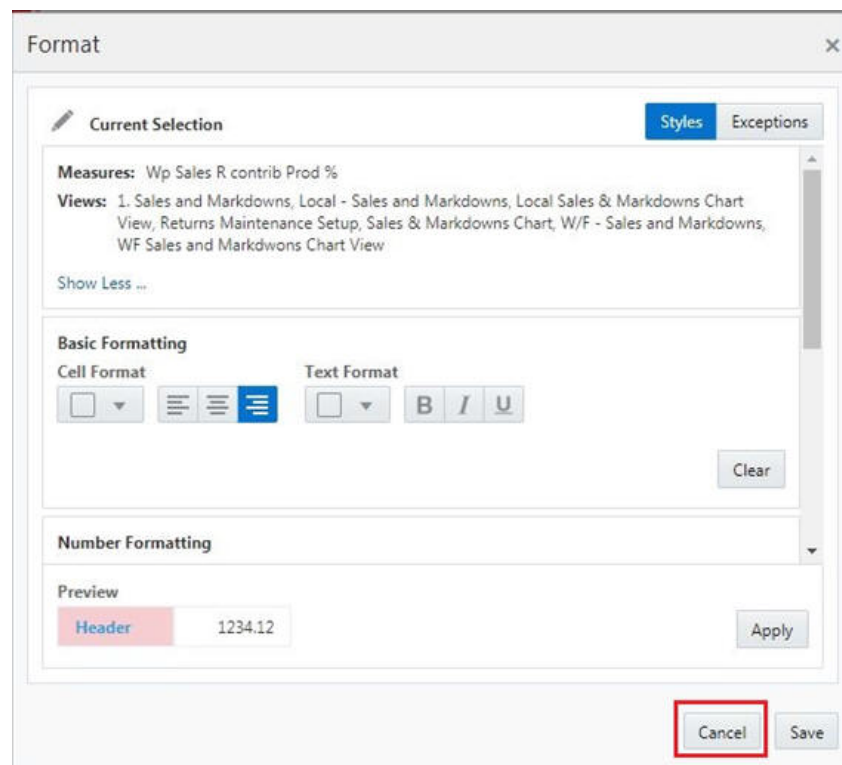
7. You can modify the basic formats as needed. To clear all styles, click **Clear**.
8. The Header Formatting section includes the following options:
 - Cell Format
 - Text Format
 - Bold
 - Italics
 - Underline

Figure 10–12 Header Formatting Options

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 Altering Number Formatting

The screenshot shows the 'Format' dialog box with the 'Number Formatting' section active. The 'Quick Format' dropdown is set to 'None'. The 'Prefix' and 'Suffix' fields are empty. The 'Scale' field is set to '1'. The 'Decimal Places' field is set to '2'. The 'Show Separator' checkbox is unchecked. The 'Header Formatting' section shows a 'Preview' of 'Header' with the value '1234.12'. The 'Apply' button is visible.

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 for Number Formatting

The screenshot shows the 'Format' dialog box with the 'Number Formatting' section active. The 'Quick Format' dropdown menu is open, displaying options: None, Currency, Percentage, Thousands, and Millions. The 'Prefix' and 'Suffix' text fields are empty. The 'Scale' text field contains the value '1'. Below these fields is a 'Show Separator' toggle switch, which is currently turned off. To the right of the 'Show Separator' toggle is a 'Clear' button. Below the 'Number Formatting' section is the 'Header Formatting' section, which includes a 'Preview' table. The table has two columns: 'Header' and a numerical value '1234.12'. To the right of the preview table is an 'Apply' button. At the bottom of the dialog box are 'Cancel' and 'Save' buttons.

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

The screenshot shows a 'Format' dialog box with a close button (X) in the top right corner. The dialog has two tabs: 'Current Selection' (active) and 'Exceptions'. Below the tabs is a 'Clear' button. The main section is titled 'Number Formatting' and contains four fields: 'Quick Format' (a dropdown menu showing 'Thousands'), 'Prefix' (an empty text box), 'Suffix' (a text box containing 'k'), and 'Scale' (a text box containing '1,000'). Below these fields are 'Decimal Places' (a spinner box showing '0') and a 'Show Separator' toggle switch (which is turned on). There is another 'Clear' button to the right of the 'Decimal Places' and 'Show Separator' controls. Below the 'Number Formatting' section is a 'Header Formatting' section with a 'Preview' label and a text box showing 'Header' followed by '1k'. An 'Apply' button is to the right of the preview. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

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 *Setting Decimal Places*

The **Format** dialog box is shown with the **Current Selection** tab active. The **Number Formatting** section includes:

- Quick Format:** A dropdown menu set to **None**.
- Prefix:** An empty text input field.
- Suffix:** An empty text input field.
- Scale:** A text input field containing the value **1**.
- Decimal Places:** A spinner control set to **2**.
- Show Separator:** A toggle switch that is currently turned off (grey).

Below the **Number Formatting** section is the **Header Formatting** section, which includes a **Preview** area showing the text **Header** followed by the number **1234.12**. Buttons for **Clear**, **Apply**, **Cancel**, and **Save** are located at the bottom of the dialog.

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 for Thousands Setting*

The **Format** dialog box is shown with the **Current Selection** tab active. The **Number Formatting** section includes:

- Quick Format:** A dropdown menu set to **None**.
- Prefix:** An empty text input field.
- Suffix:** An empty text input field.
- Scale:** A text input field containing the value **1**.
- Decimal Places:** A spinner control set to **2**.
- Show Separator:** A toggle switch that is now turned on (blue).

Below the **Number Formatting** section is the **Header Formatting** section, which includes a **Preview** area showing the text **Header** followed by the number **1,234.12**. Buttons for **Clear**, **Apply**, **Cancel**, and **Save** are located at the bottom of the dialog.

Modifying Date and Time Formats

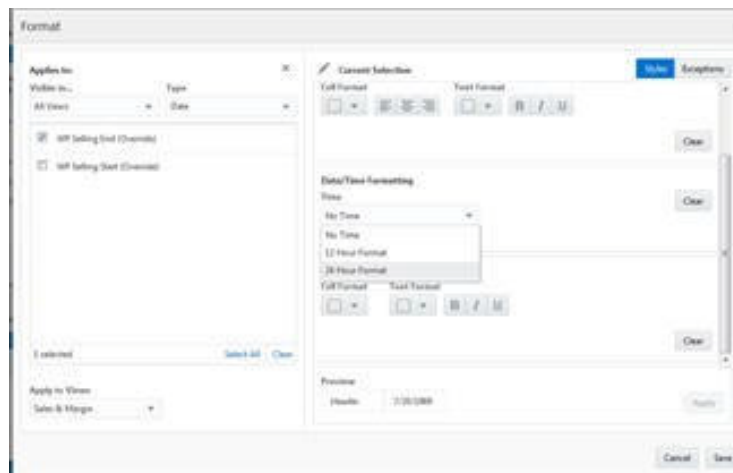
When you select date measures with the filter feature, you can modify the date and time formatting for those measures. When you are not using the filter feature, the measures that appear in the Measure field within the Apply Date/Time format section show only date measures that are visible in the current 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 Formatting 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.

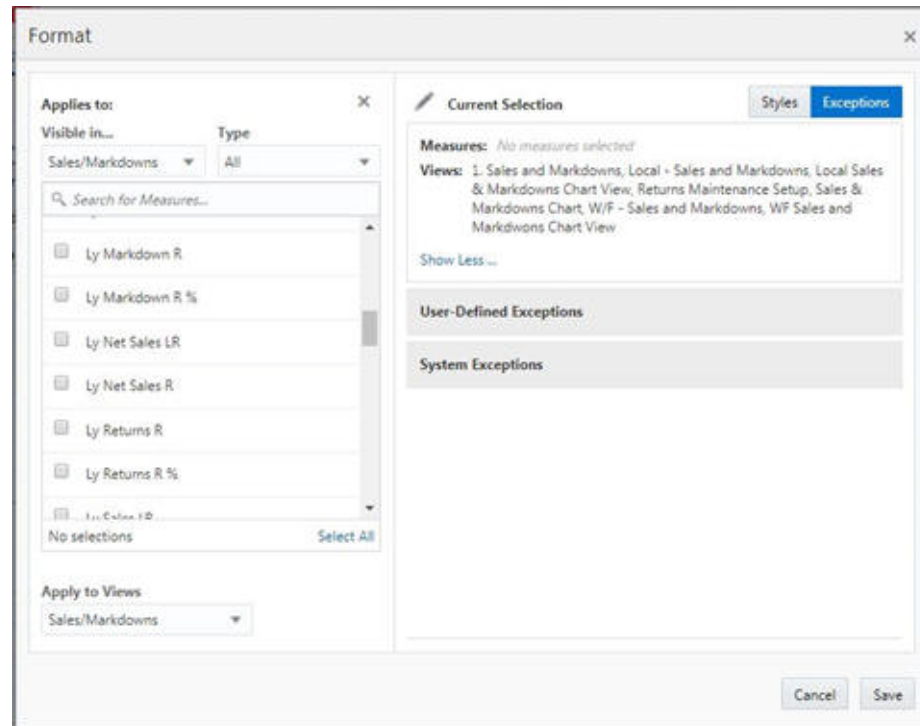
From the Exceptions tab of the Format dialog box, you can use the filter feature to locate measure and then modify the exception formatting for those measures. When you are not using the filter feature, the measures that appear in the Measure field within the Apply measure format section show the numeric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

Numeric Exception Formatting

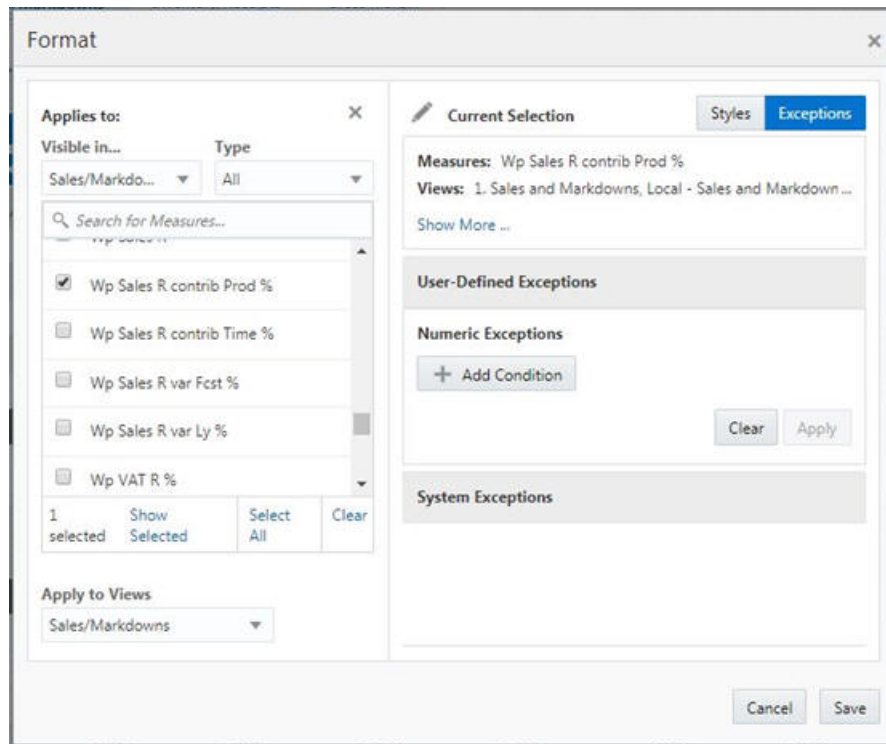
To apply exception formatting, click the **Exceptions** tab of the Format dialog box and complete the following steps:

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 10–21 Exception Tab for Number Formats



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 10–22 Search for Measure to Alter

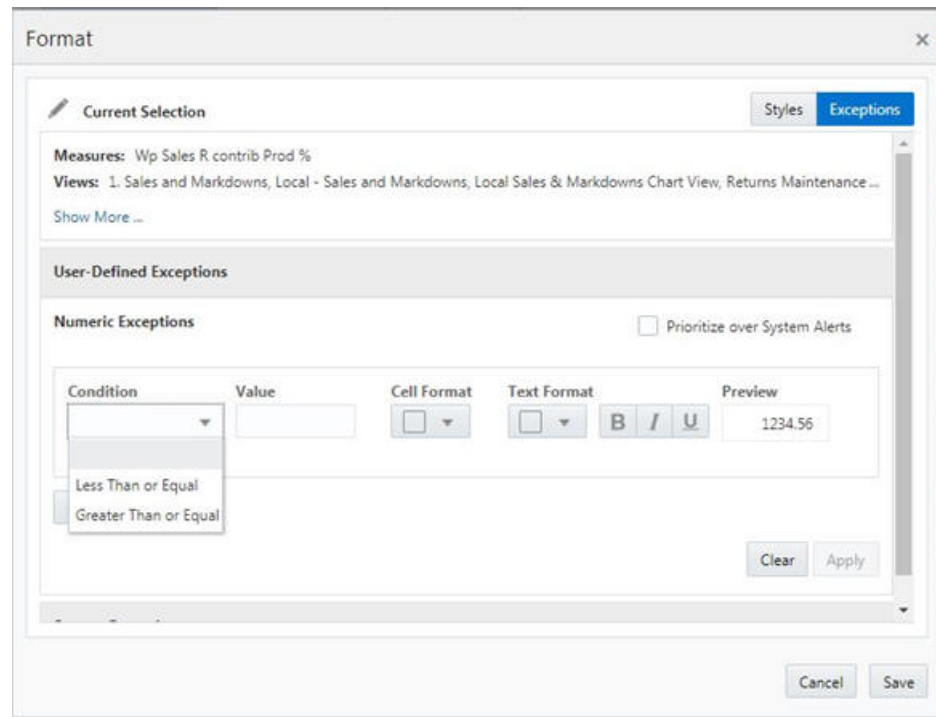
3. In the Applies to field, select the views to apply the formats to.
4. Click the current selection to hide the selection panel.
5. You can see the summary of your selection under Measures and Views. Click **Show More** or **Show Less** to see the selection criteria.
6. Under the User-Defined Exceptions, 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:

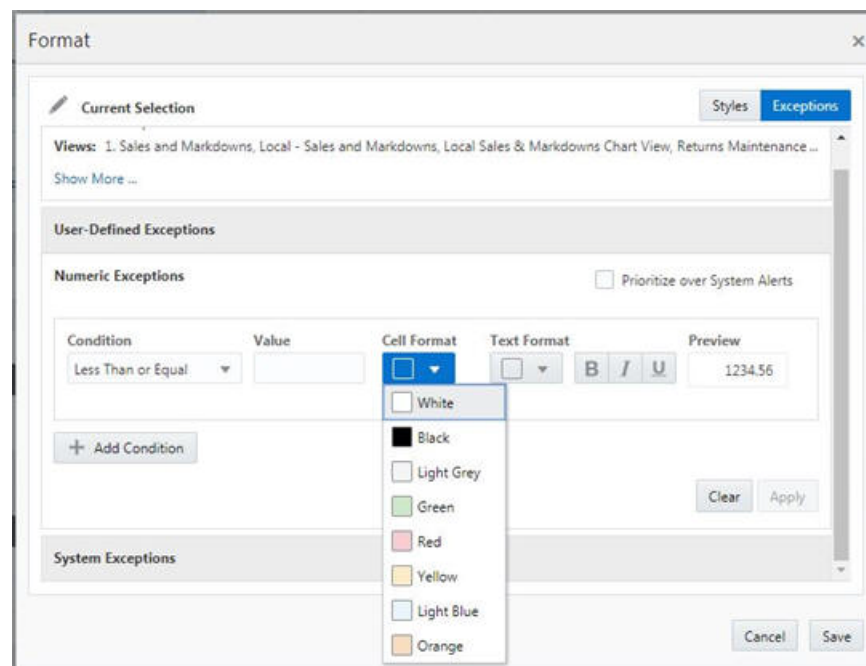
- **Less Than or Equal:** Use this to select values that are less than or equal to a value specified by the user.
- **Greater Than or Equal:** Use this to select values that are greater than or equal to a value specified by the user.
- **Equal:**

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 10-23 Exception Condition Value

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

Figure 10-24 Cell Format Settings

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

Figure 10–25 Text Format Fields

The screenshot shows the 'Format' dialog box with the 'Exceptions' tab selected. Under 'User-Defined Exceptions', the 'Numeric Exceptions' section is active. The 'Condition' is set to 'Less Than or Equal', and the 'Value' field is empty. The 'Cell Format' is set to 'Light Blue'. The 'Text Format' section shows a red color swatch, the text 'Red', and bold, italic, and underline formatting buttons. A preview box displays the number '1234.56' in red. At the bottom right, there are 'Clear', 'Apply', 'Cancel', and 'Save' buttons.

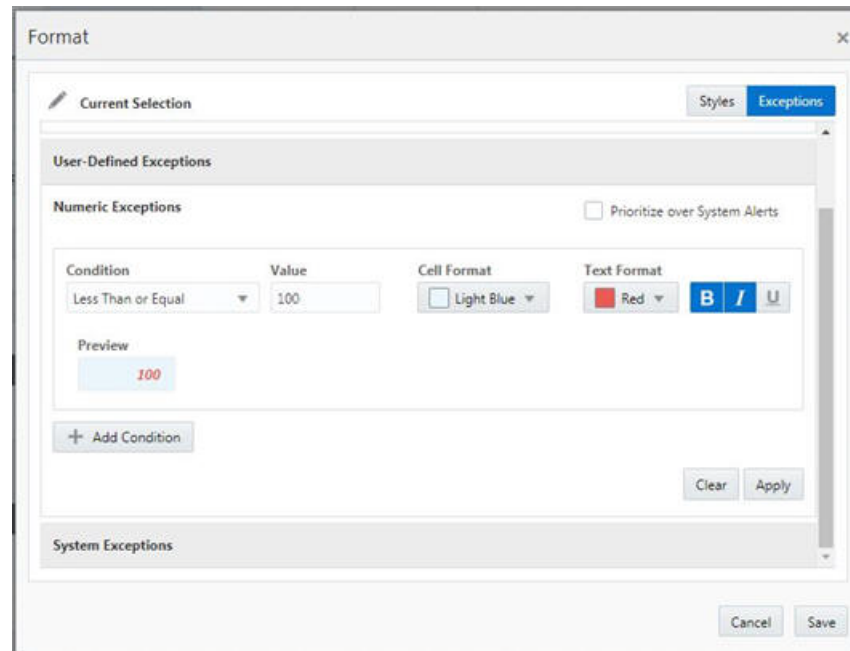
10. Preview displays how the format change appear. Click **Apply** to add the condition with format. To prioritize the alert you created over System alert, click the check box for Prioritize over system alert.

Figure 10–26 Apply Format Exception

This screenshot is similar to Figure 10–25, but the 'Value' field now contains the number '100'. The preview box displays '100' in red. The 'Apply' button is highlighted, indicating it is the next step to be taken. The 'Cancel' and 'Save' buttons are also visible at the bottom right.

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.

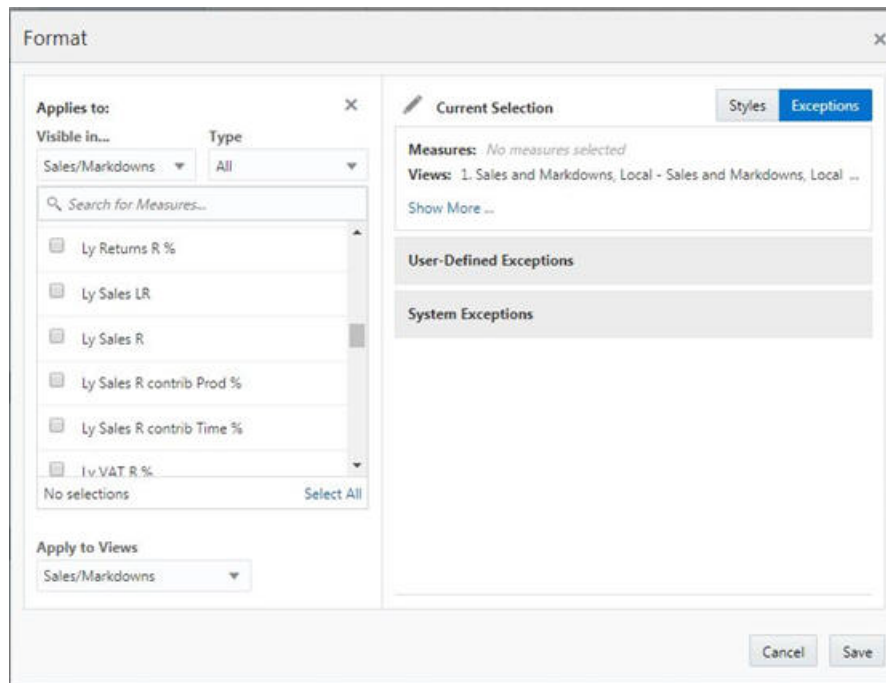
Figure 10–27 Apply and Save Formats



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 10–28 Boolean Exception Tab for Formatting

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. To view only the selected measure, click **Show Selected**. To select all measures, click **Select All**. To clear the selection, click **Clear**.

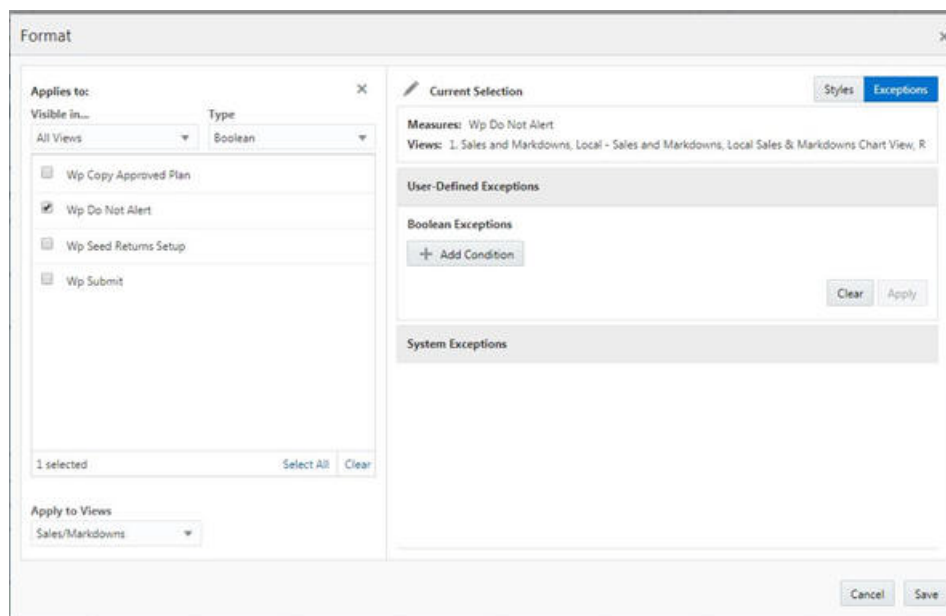
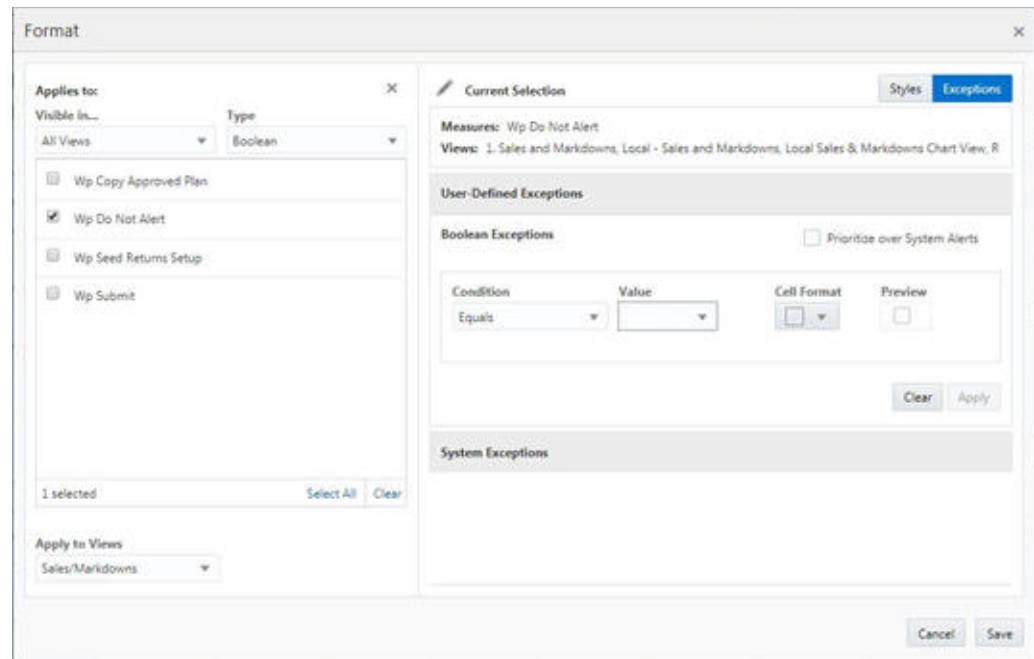
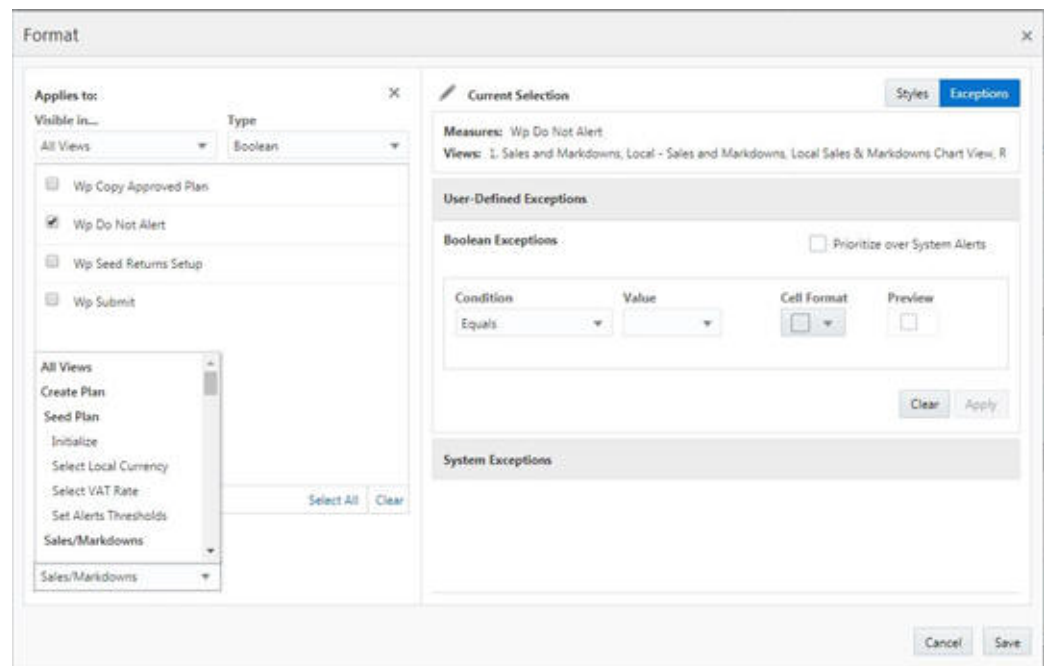
Figure 10–29 Filter Measure for Exception

Figure 10–30 Add User-Defined Boolean Exception

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

Figure 10–31 Applies To Field for Boolean Exception

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.

- 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 10–32 Boolean Exception Condition Value

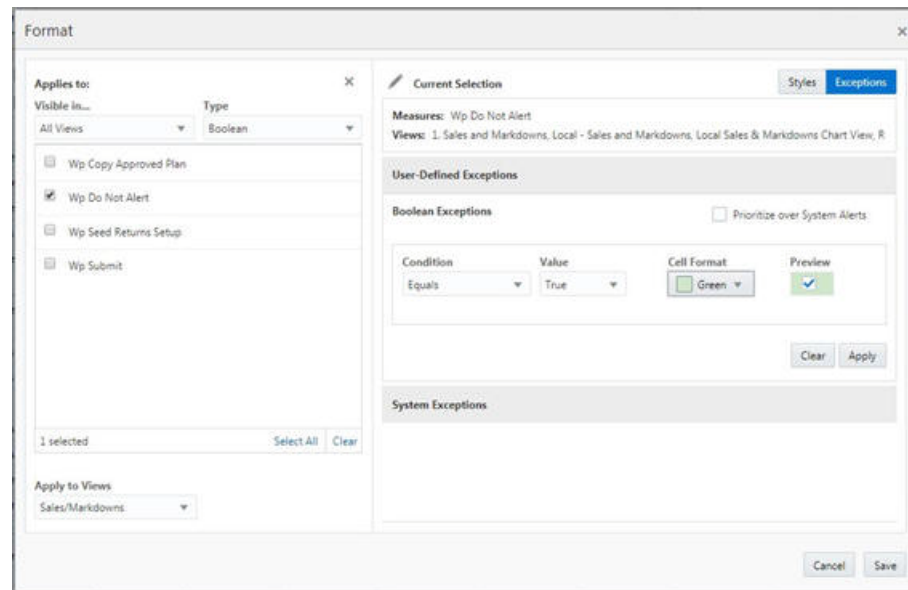
The screenshot shows the 'Format' dialog box with the 'Exception' tab selected. On the left, under 'Applies to', 'Wp Do Not Alert' is selected. The 'Type' is set to 'Boolean'. On the right, under 'User-Defined Exceptions', the 'Boolean Exceptions' section is active. The 'Condition' is set to 'Equals' and the 'Value' is set to 'True'. The 'Cell Format' is set to 'Green' and the 'Preview' shows a green square. The 'System Exceptions' section is empty. At the bottom, there are 'Cancel' and 'Save' buttons.

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

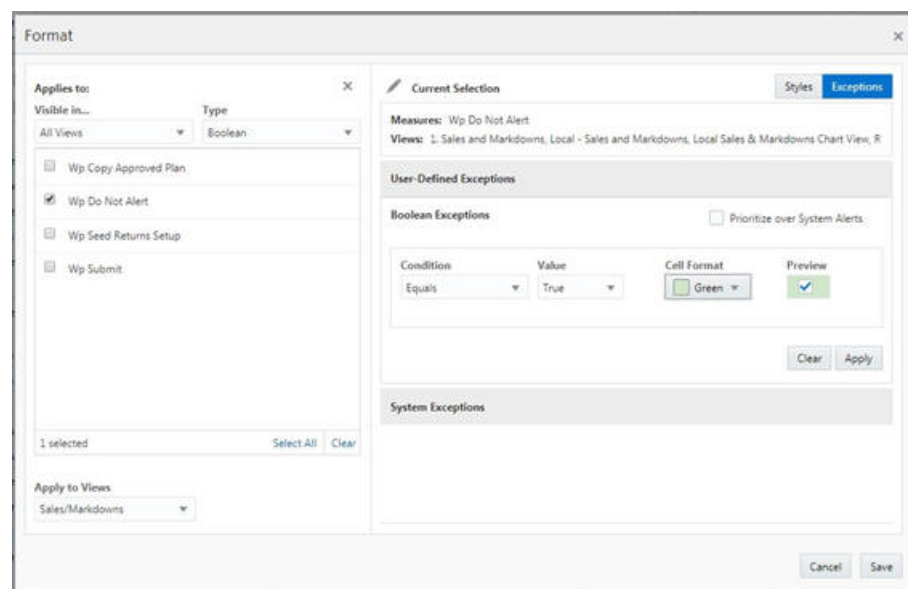
Figure 10–33 Boolean Exception Cell Format

The screenshot shows the 'Format' dialog box with the 'Exception' tab selected. On the left, under 'Applies to', 'Wp Do Not Alert' is selected. The 'Type' is set to 'Boolean'. On the right, under 'User-Defined Exceptions', the 'Boolean Exceptions' section is active. The 'Condition' is set to 'Equals' and the 'Value' is set to 'True'. The 'Cell Format' is set to 'Green' and the 'Preview' shows a green square. The 'System Exceptions' section is empty. At the bottom, there are 'Cancel' and 'Save' buttons.

- 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 10–34 Apply Boolean 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 10–35 Apply and Save Boolean Exceptions

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:

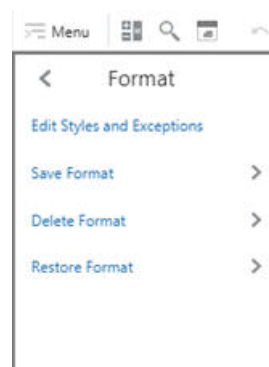
1. If Save Formats/Only For Me exists for the user opening the workspace, use the last saved Only For Me formats.
2. If no Save Formats/Only For Me exists, use Save Formats/For My Groups: Administrators.
3. If no Save Formats/For My Groups: Administrators exists, use the default configured formats.

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

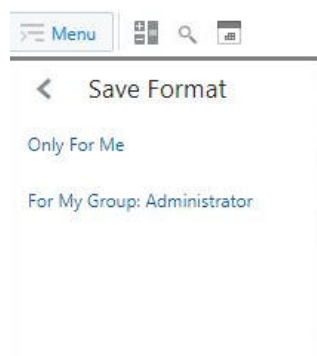
To save formats, complete the following steps:

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

Figure 10–36 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 10–37 *Format Level for Saving Format*

Deleting Formats

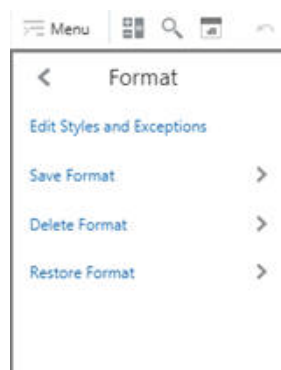
Delete Format has similar options to Save Format. The Delete Format options are:

- **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: <Group Name>** If this option is used by any user, the For My Group: <Group Name> 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**.

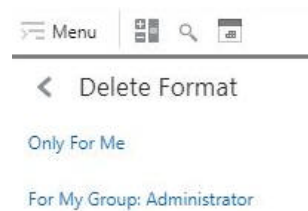
Figure 10–38 *Delete Format*

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: <Group Name>** If this option is used by any user, the For My Group: <Group Name> 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 10–39 Delete Format Options



Restore Format

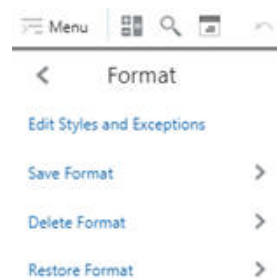
Restore Format is used to restore the format from the workspace template or from a group, so that you can be aligned with your team. From time to time your team-lead or planning manager will make changes to the Group template that represent best practice business processes for the team. You can align with the team and inherit the changes that have been made by using this option. In addition, the configuration updates made by Oracle can be inherited so that you can take advantage of new features, new measures, and so on.

When you use Restore Format for your Group template or Workspace template (system default template), the format is saved for you. Using the Save Only for Me option is lost. You can undo the action using the Undo link on the Snackbar notification that is displayed after the format is restored.

To restore the format, complete the following steps:

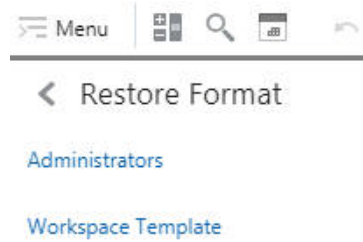
1. From the Quick Access toolbar, click **Menu** and then **Restore Format**.

Figure 10–40 Restore Format



2. Select one of the following Restore Format to options:
 - **Group(s):** The groups to which you belong are listed. Select the group to which you want to restore your format to.
 - **Workspace Template:** This option restores your format to the default Workspace template format.

Figure 10–41 *Restore Format Options*



11

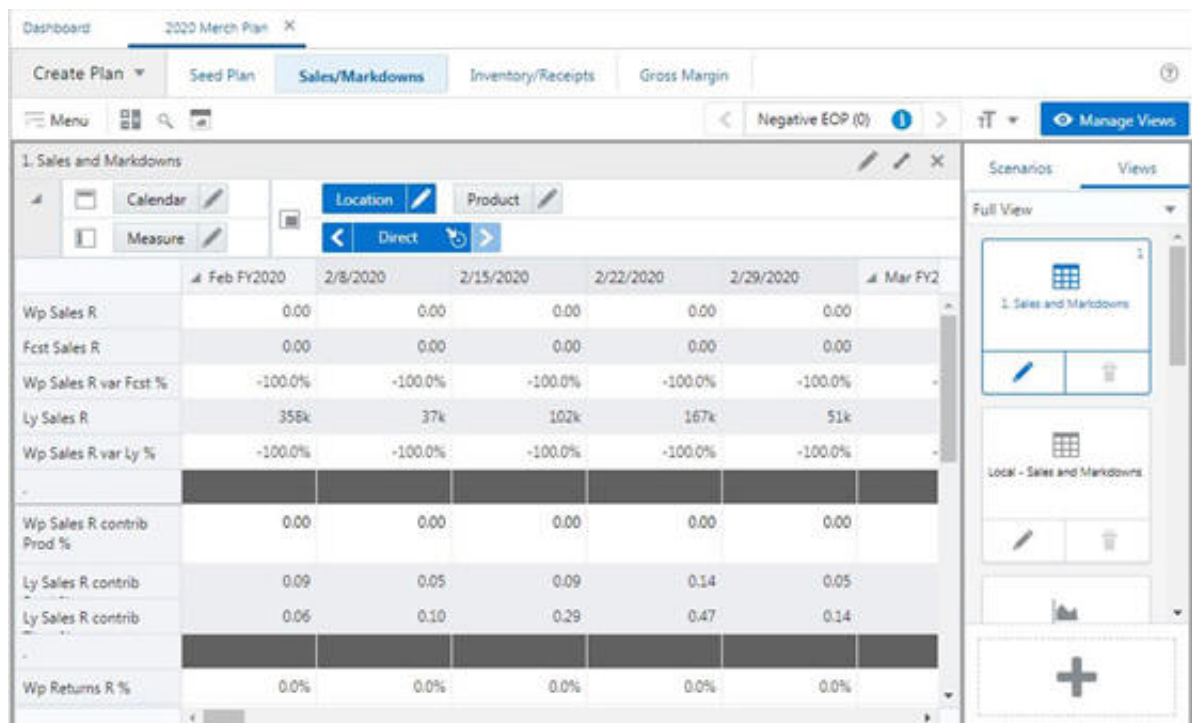
Export

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](#).

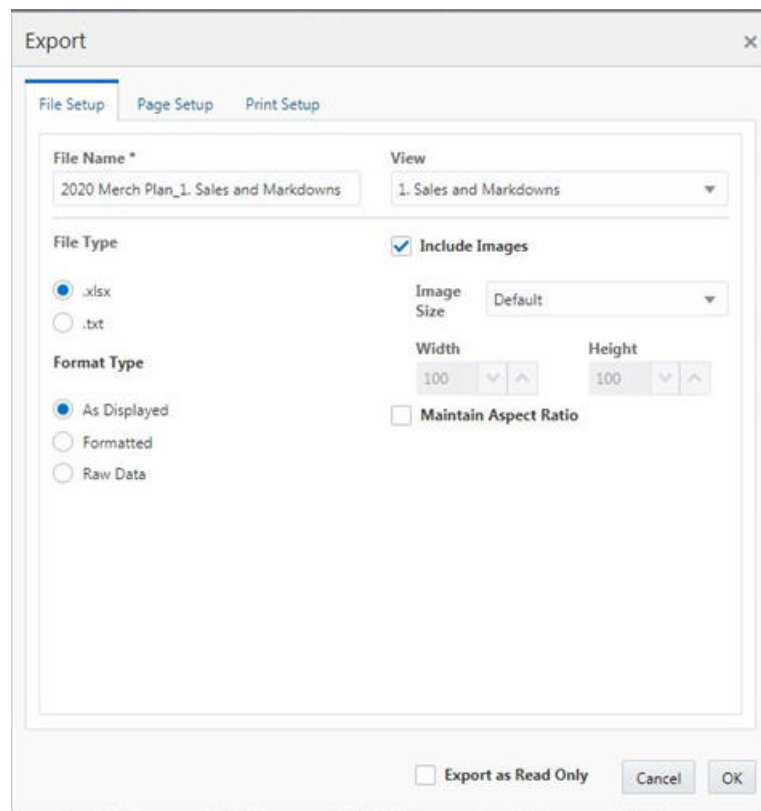
Figure 11-1 Export Option



The screenshot shows the RPASCE interface with the 'Sales/Markdowns' view selected. The 'Export' button is located in the top right corner of the view area, next to the 'Manage Views' button. The view displays a table of sales and markdown data for February and March 2020.

| | Feb FY2020 | 2/8/2020 | 2/15/2020 | 2/22/2020 | 2/29/2020 | Mar FY2 |
|---------------------------|------------|----------|-----------|-----------|-----------|---------|
| Wp Sales R | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Fcst Sales R | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Wp Sales R var Fcst % | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | |
| Ly Sales R | 358k | 37k | 102k | 167k | 51k | |
| Wp Sales R var Ly % | -100.0% | -100.0% | -100.0% | -100.0% | -100.0% | |
| Wp Sales R contrib Prod % | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| Ly Sales R contrib | 0.09 | 0.05 | 0.09 | 0.14 | 0.05 | |
| Ly Sales R contrib | 0.06 | 0.10 | 0.29 | 0.47 | 0.14 | |
| Wp Returns R % | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |

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

Figure 11–2 Export Dialog Box

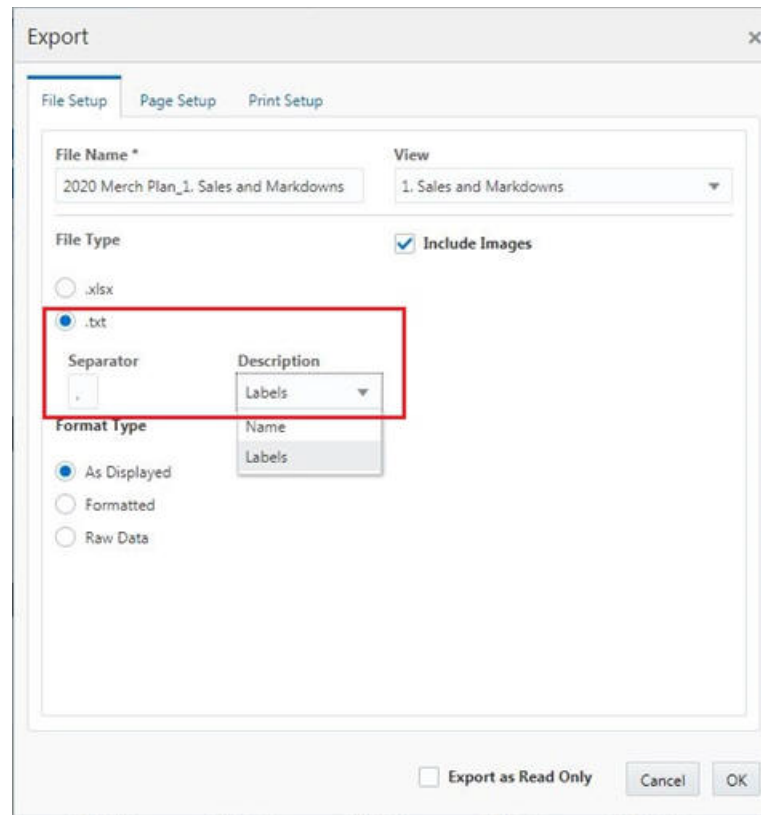
The export dialog box provides access to the following three tabs:

- [File Setup](#)
- [Page Setup](#)
- [Print Setup](#)

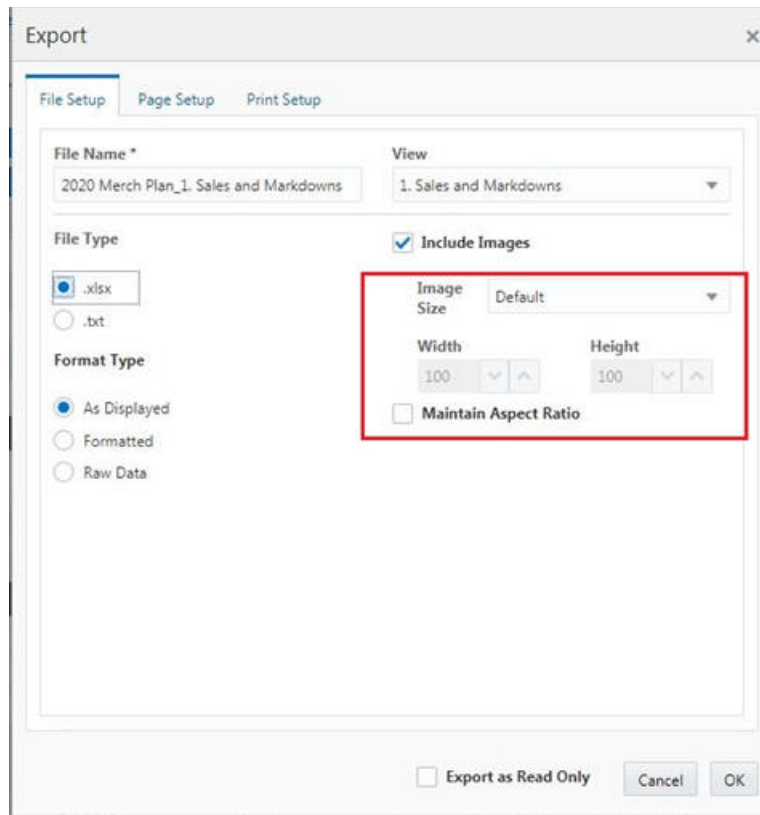
File Setup

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.

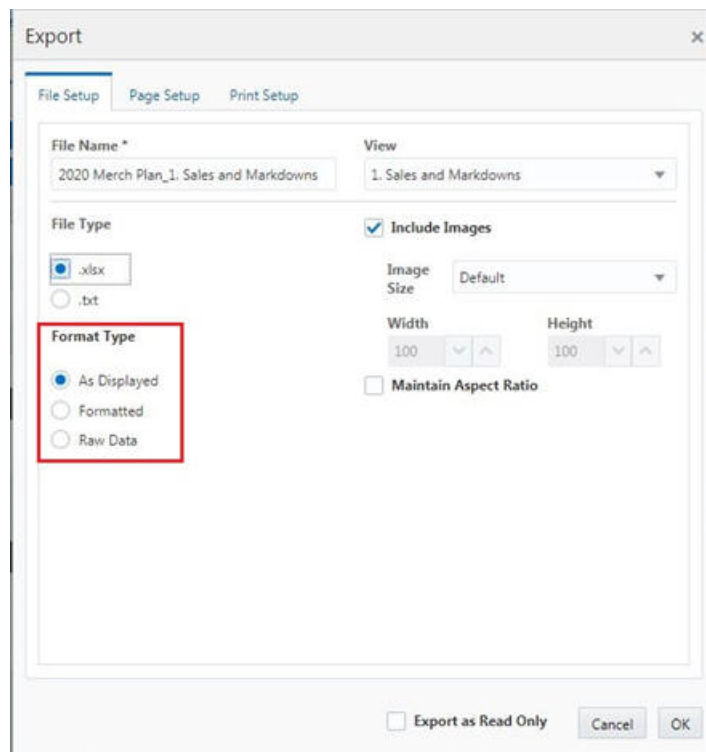
1. Enter the file name. The exported file has this file name.
2. Select the view that you would like to export.
3. Choose the file type for the exported file. File types are either Text or Microsoft Excel.
 - When you select Text, you see the options to select the Separator and the Description. Description 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 Export Options

- **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.

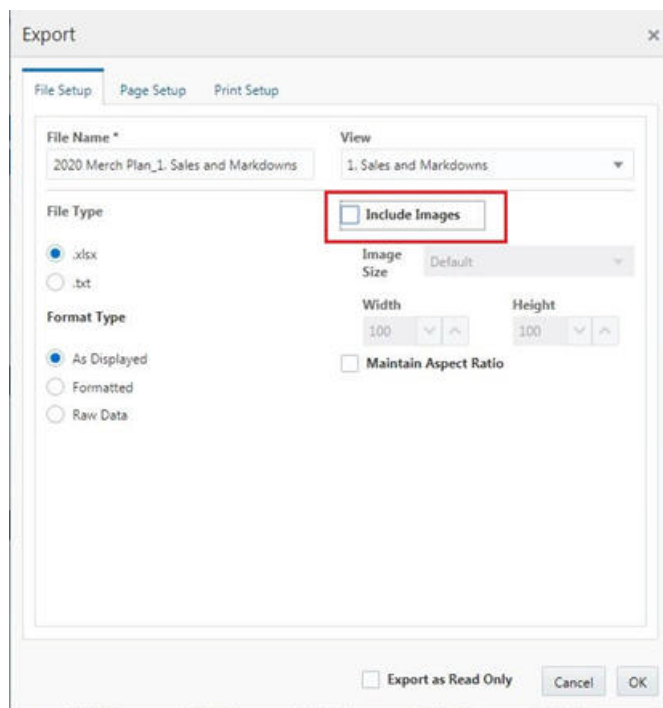
When you use the formatted option and use a scale factor of anything besides 1000, the value in Excel is displayed as the raw formatted value, not the scaled formatted value. For percentages, a scale factor of .01 displays as a percent in Excel.

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 File Setup Include Images

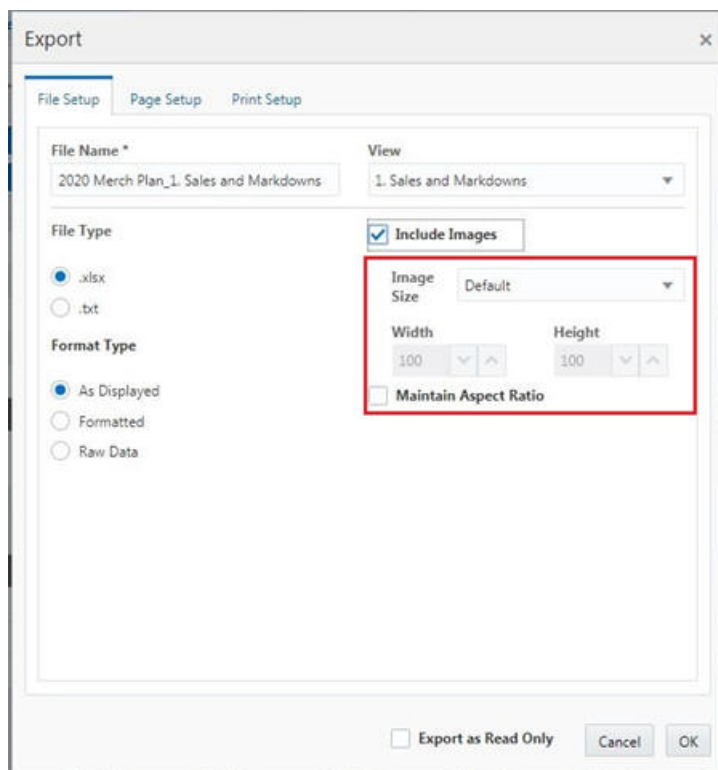


6. Select the image size of the exported images from the drop-down menu. This option is available only for Microsoft Excel. The three available values are Default, Large, and Custom.

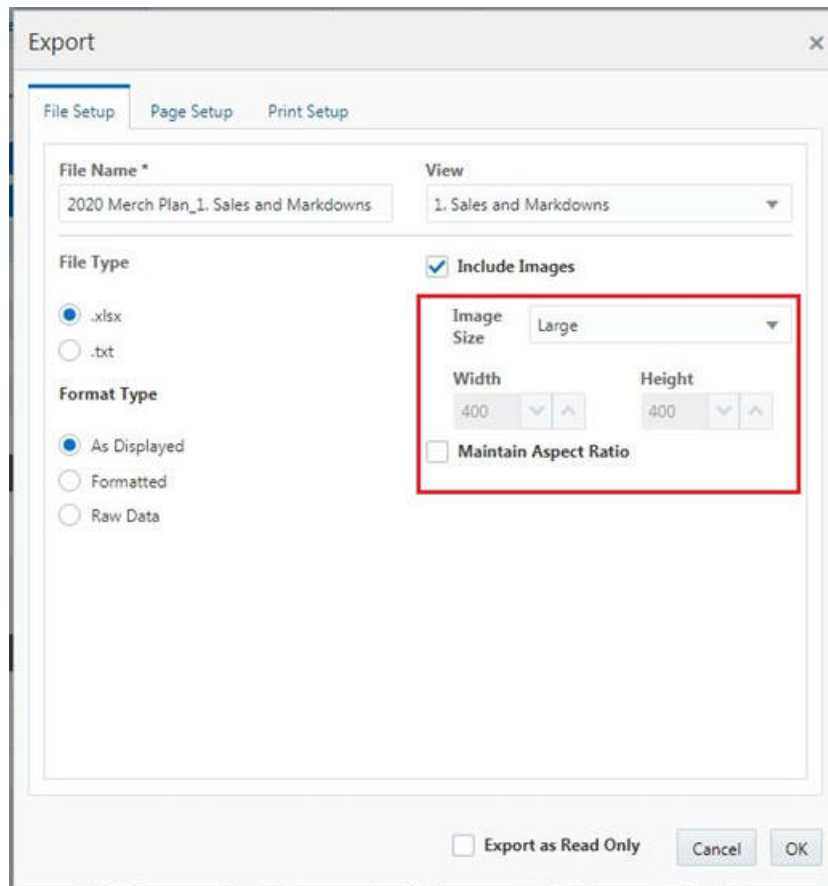
The image size associated with the Default option and the Large option can be changed by the administrator. The default values are set for both the cell width and the cell height.

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

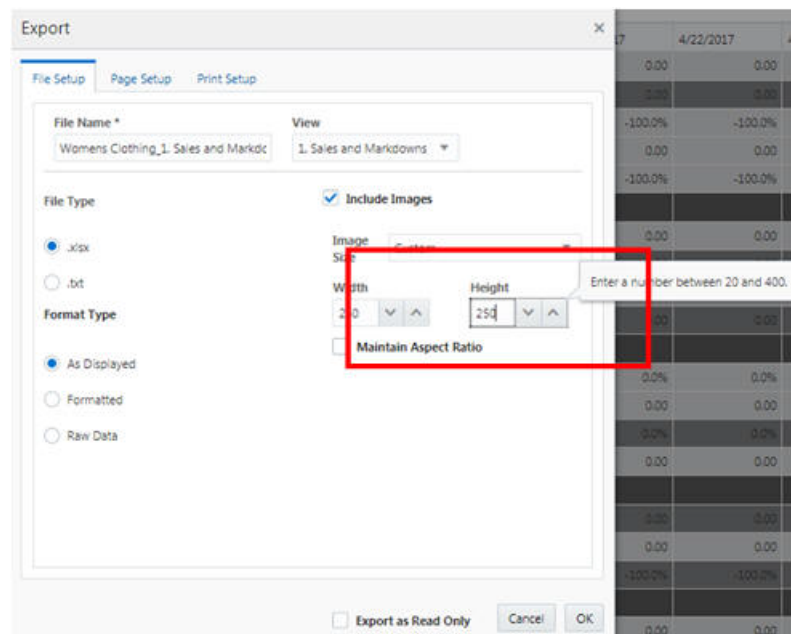
Figure 11-7 Image Size Default Option



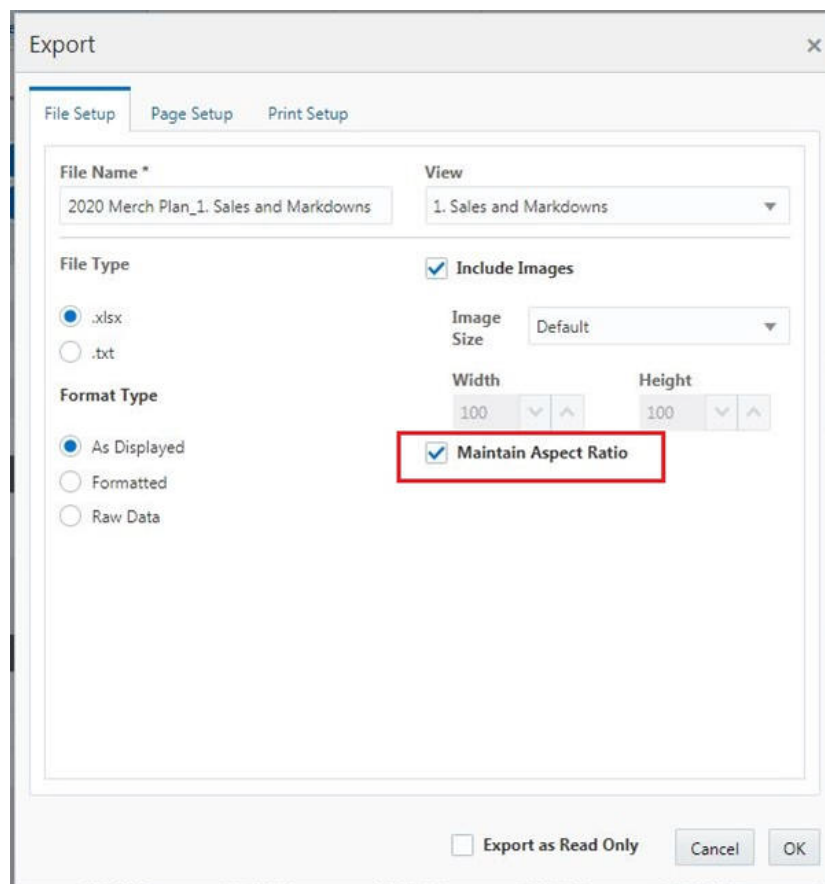
- Large option, the width and height specified as 400 x 400.

Figure 11–8 Image Size 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 Image Size 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 Image Size Maintain Aspect Ratio

Page Setup

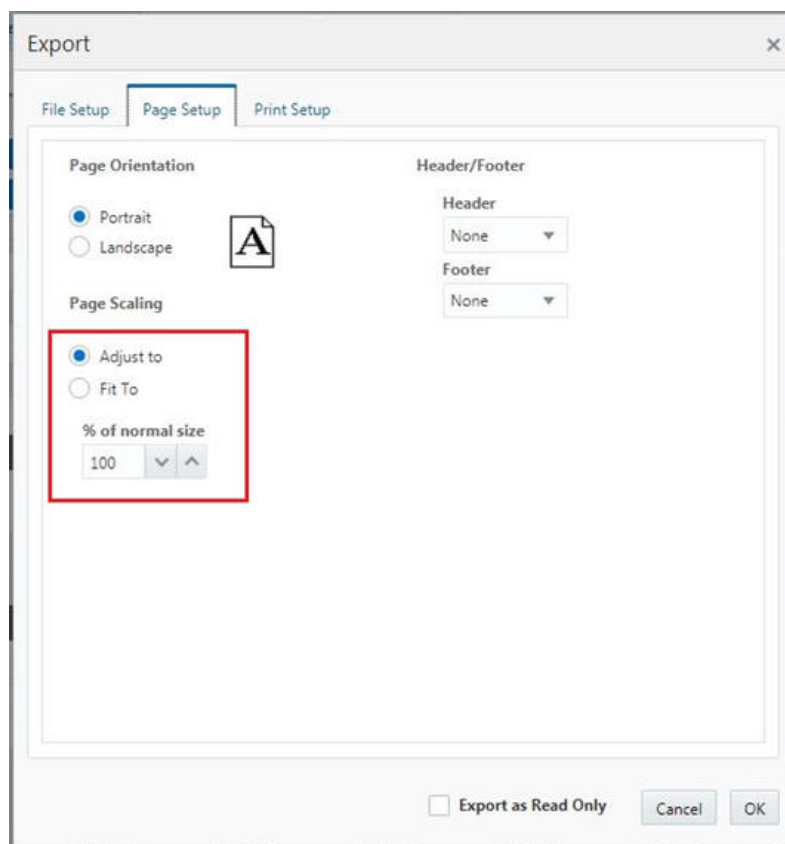
You can use the Page Setup tab to specify the page orientation, page scaling, and the header/footer. These options are described in this section.

Page orientation indicates the way in which a rectangular page is oriented for normal viewing. The two options 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.

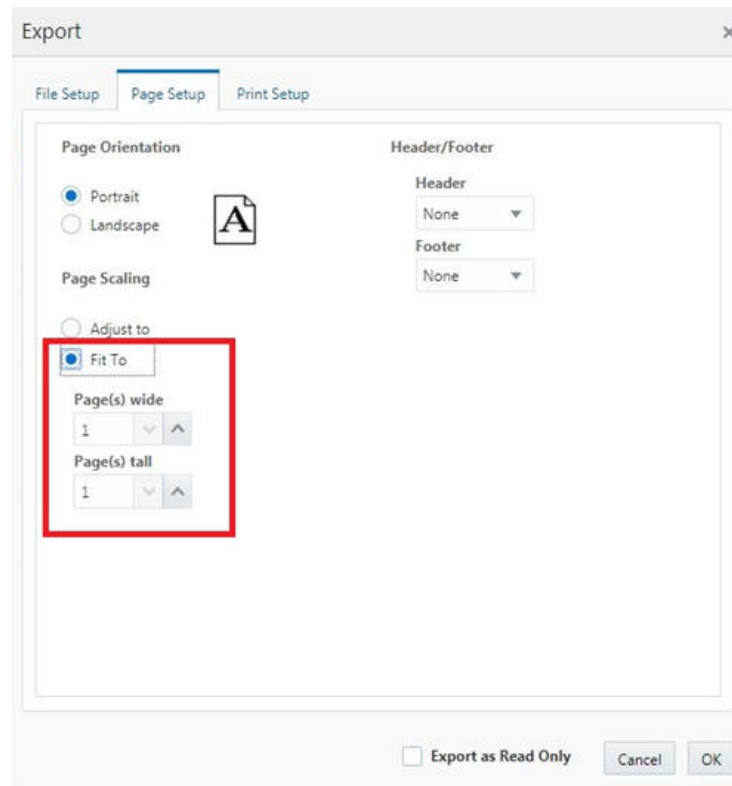
Page scaling has two options:

- 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.

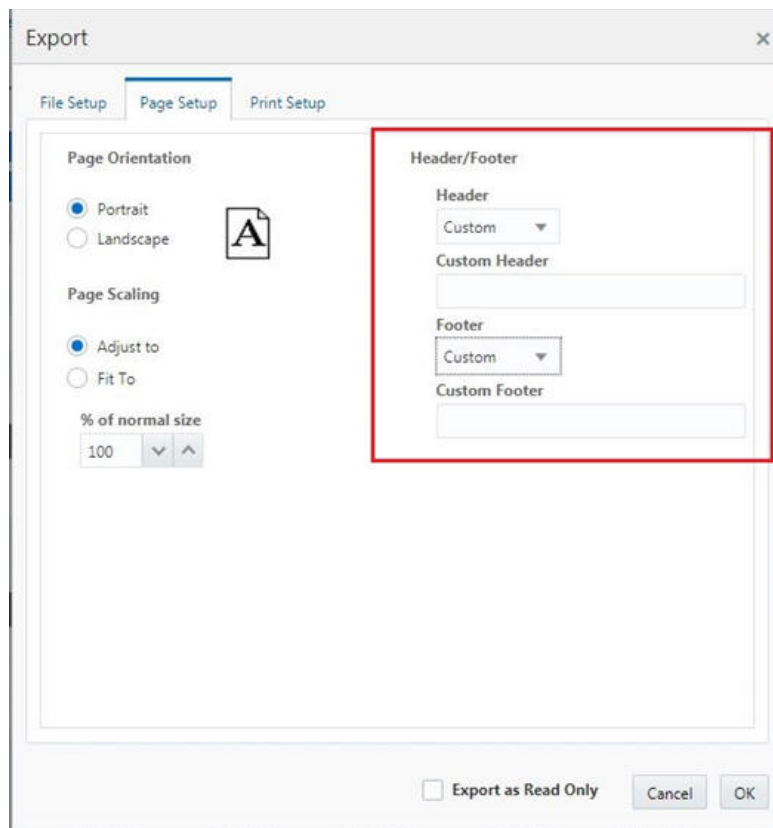
Figure 11–11 Page Setup Adjust To



- 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 Page Setup 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.

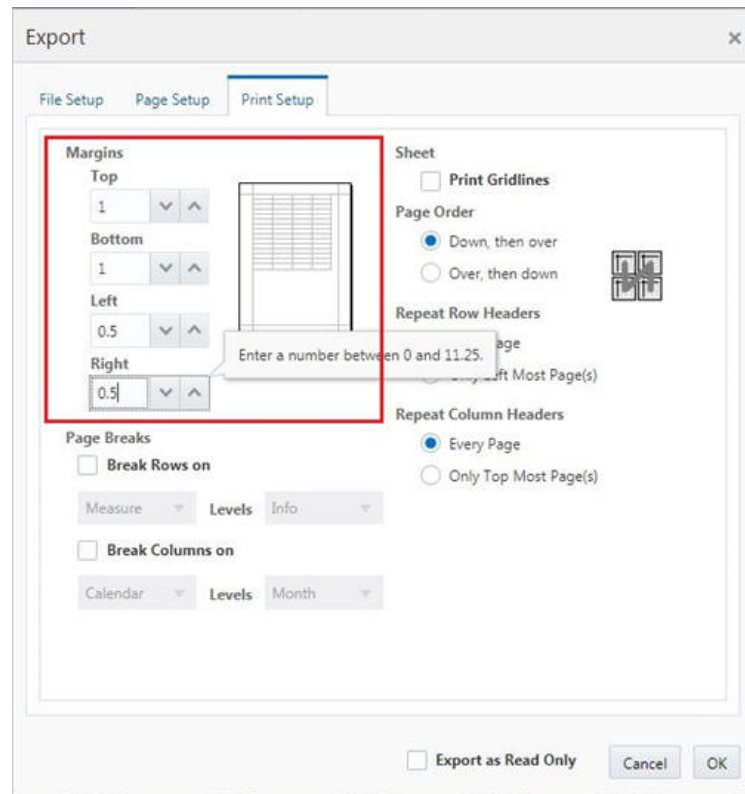
Figure 11–13 Page Setup Header/Footer

Print Setup

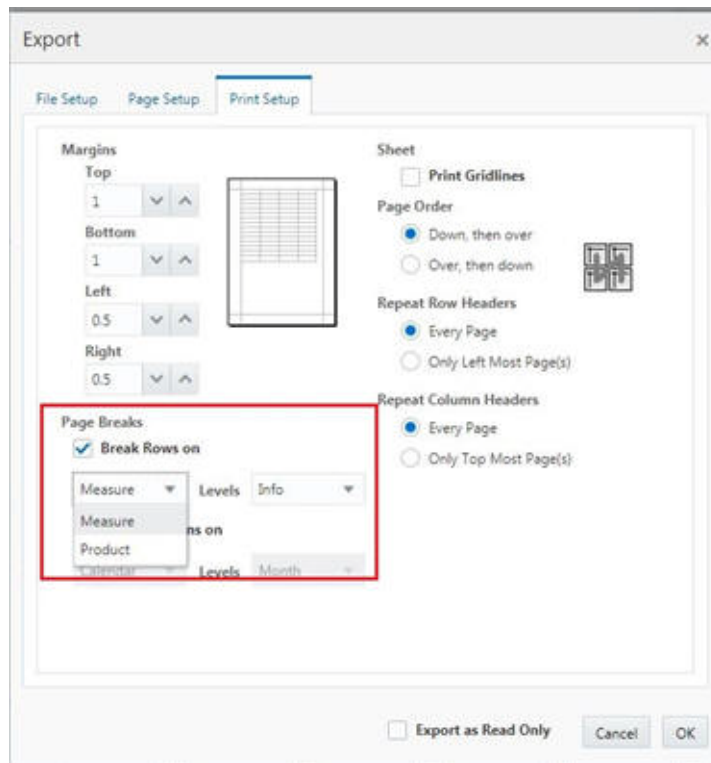
You can use the Print Setup tab to specify the page margins, page breaks, print grid-lines, page order, repeat headers, and repeat column header. These options are described in this section.

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.

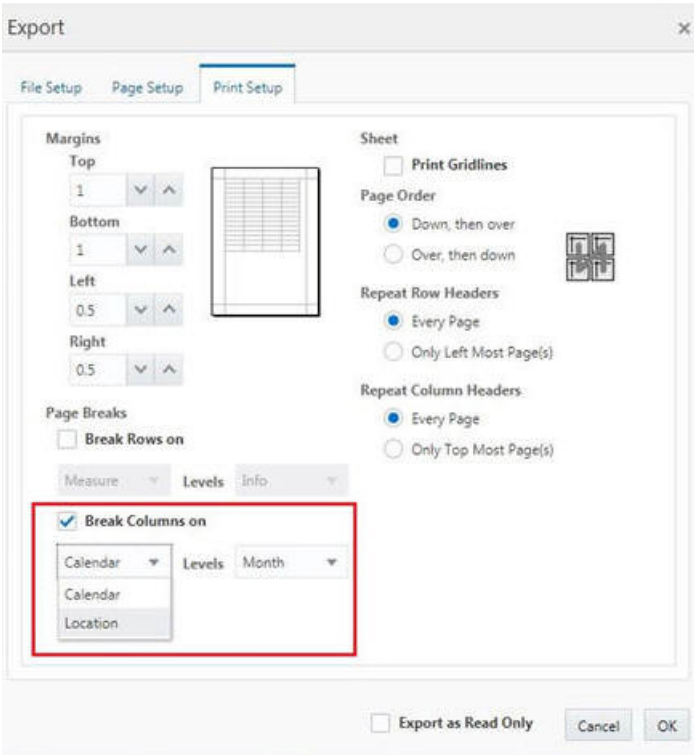
Figure 11-14 Print Setup Margins

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 Print Setup Page Break Rows On

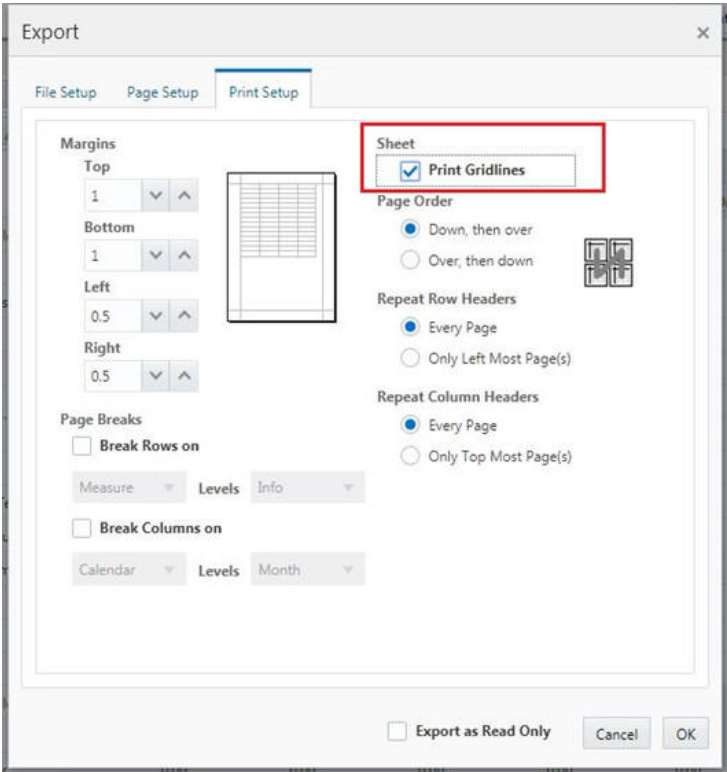
If you want space between columns, select **Break Columns on**. This is used to select the Z-axis dimensions of the selected view. If more than one, then both values are shown.

Figure 11-16 Print Setup Break Columns On



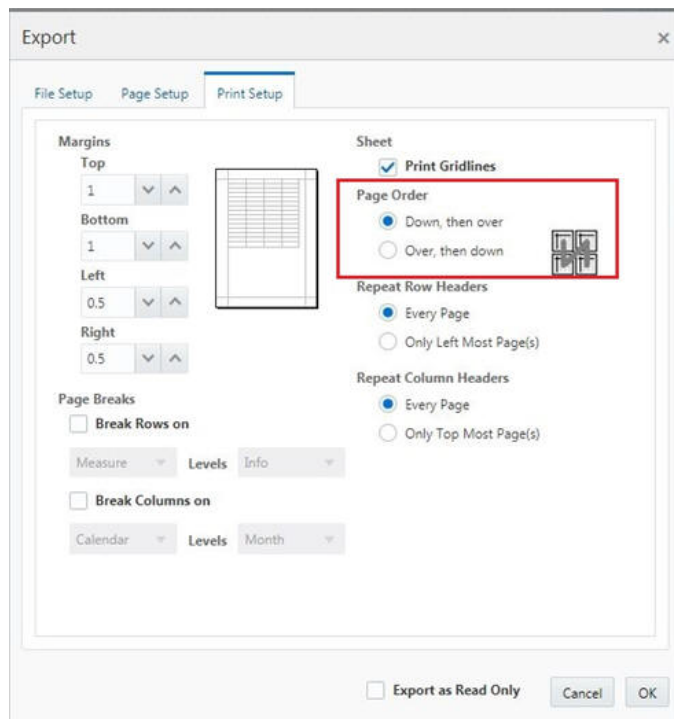
Use the print Gridlines option if you want the gridlines to be printed.

Figure 11-17 Print Setup Print Gridlines



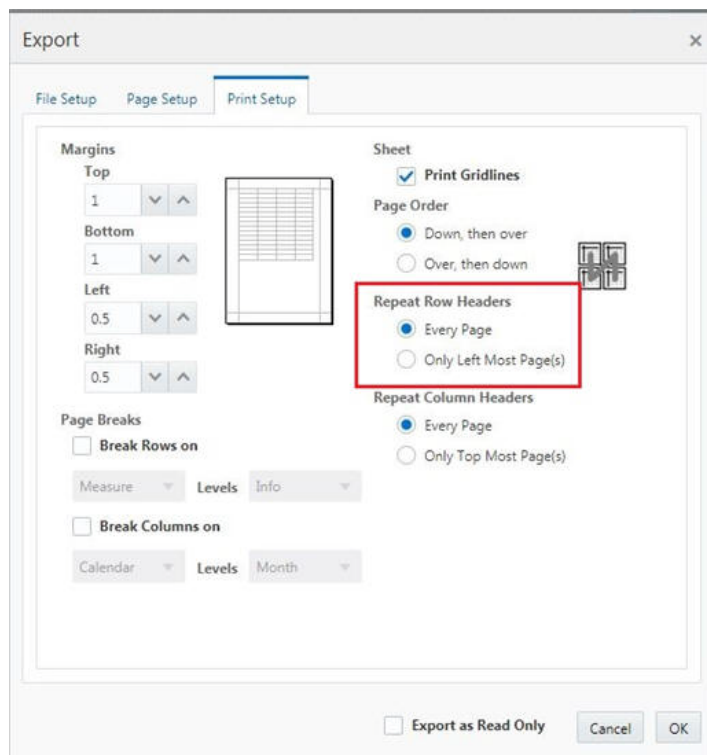
Use Page Order to specify either Down, then over or Over, the down.

Figure 11–18 Print Setup Page Order



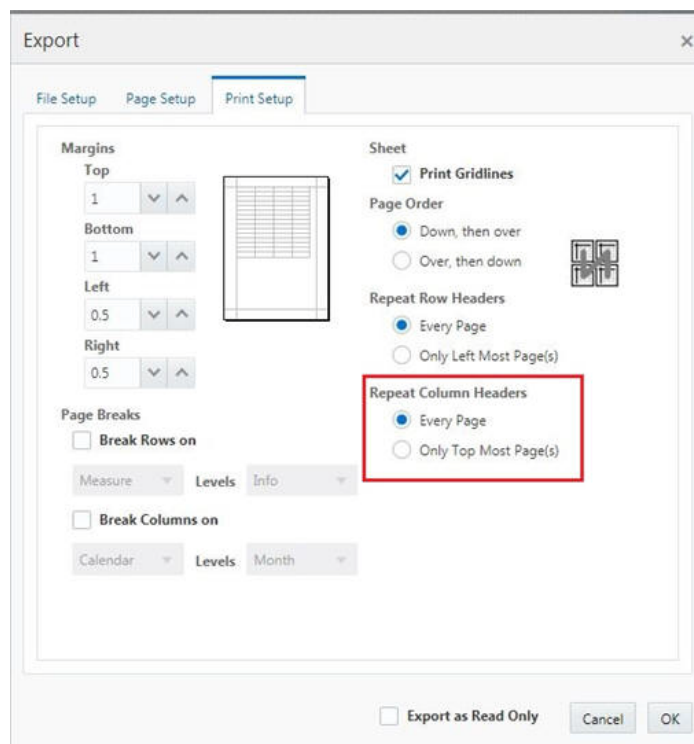
You can either repeat row headers every page or only on the left-most page.

Figure 11–19 Print Setup Repeat Row Headers



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

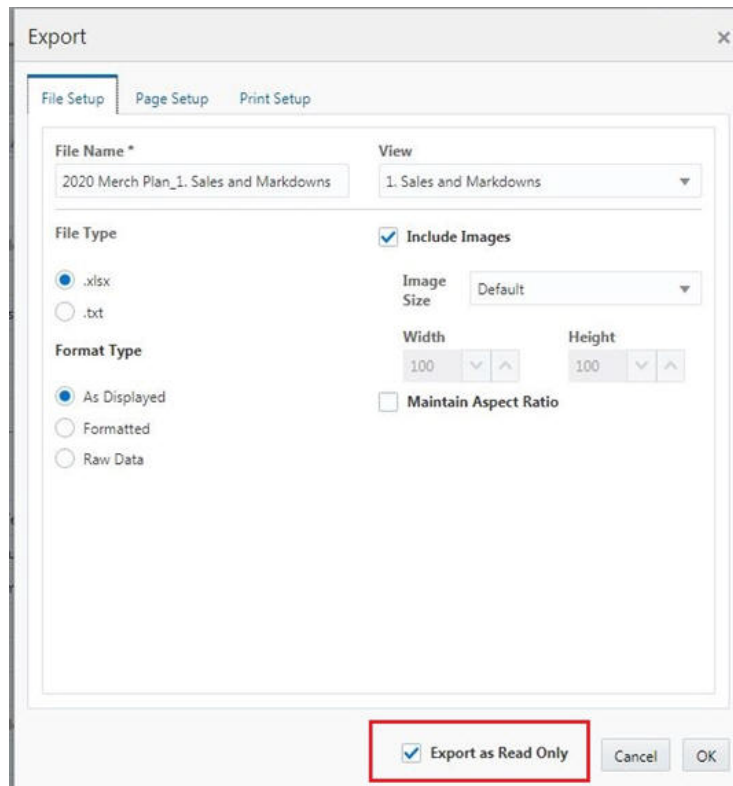
Figure 11–20 *Print Setup Repeat Column Headers*



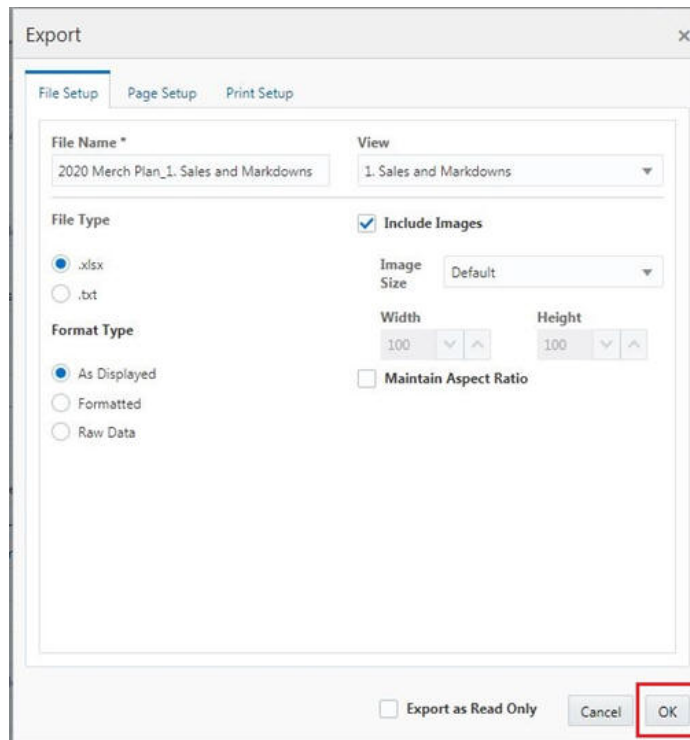
After Setup

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.

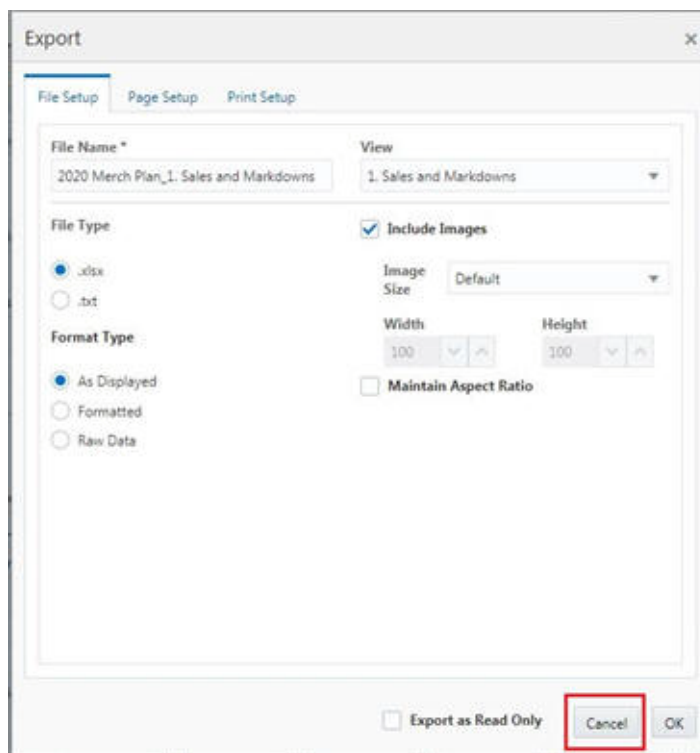
Figure 11–21 File Setup Export as Read Only

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

Figure 11–22 File Setup Download View

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

Figure 11–23 File Setup Exit Export



Note: If you are exporting a large number of cells, you will see the following error message: "The number of cells in the view is too large to Export. The maximum cells cannot exceed {limit}. Use Edit View to reduce the number of selections displayed." The limit is set by the property `printexport.maximum.cells` in `rpasConfig.properties` file.

Special Filters

Special Filters are preconfigured rules that filter data so that only positions that fulfill the requirements of the query are displayed in the view. This chapter provides details about special filters. Special filters can be used to validate the assortment by product and location attributes or by style/color options such as new, carryover, or non-go forward.

Overview

Special filters are configured in RPAS Configuration Tools by a systems implementer. They are defined to have a workspace view name, a dimension level to be filtered, and the condition and measures that are filtered on. For example, if a systems implementer has configured a special filter to filter for stores with sales greater than \$3500, a planner can turn on that special filter to display only those stores.

Special filters are used to affect the visible positions in the workspace view. These filters contain special rules, so planners can focus dynamically on the information that is important to them. Hovering over a special filter displays information about the filter criteria. Special Filters are referred to as Position Queries in *Oracle Retail Predictive Application Server Cloud Edition Configuration Tools User Guide*.

Special Filters and Dimensions

The dimension that the filter is based on must be in the page edge (Z-axis), also known as the driving dimension. The dimensions in the X-axis and Y-axis are the filter dimensions. The data in the filter dimensions is based on the current position of the driving dimension.

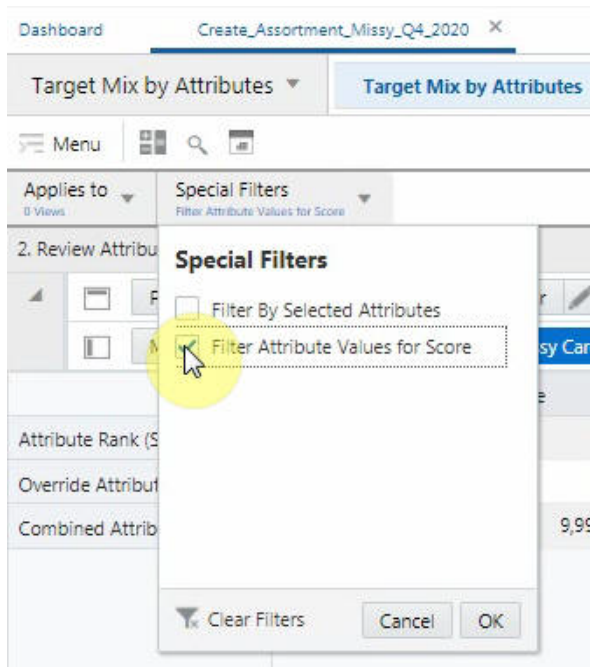
When a special filter is applied to a view, the positions in the filter dimensions (X-axis and Y-axis) that fulfill the requirements of the filter for the particular position of the driving dimension (Z axis) are the only ones shown in the view. All other positions are hidden automatically.

When more than one driving dimension is present, all of the driving dimensions must be in the Z-axis for the position filter to execute. If one or more driving dimensions are taken out of the Z-axis and placed in the X-axis or Y-axis, the associated position filters are not executed. A given view can have more than one position filter, driven by one or more dimensions in the Z-axis and driving different dimensions in the X-axis and Y-axis.

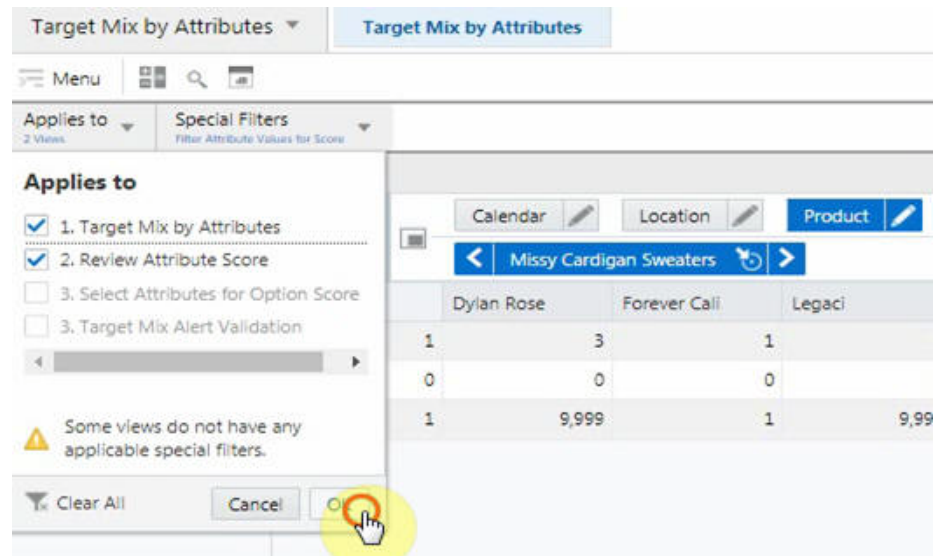
Figure 12–1 Special Filters

Special Filters Definition

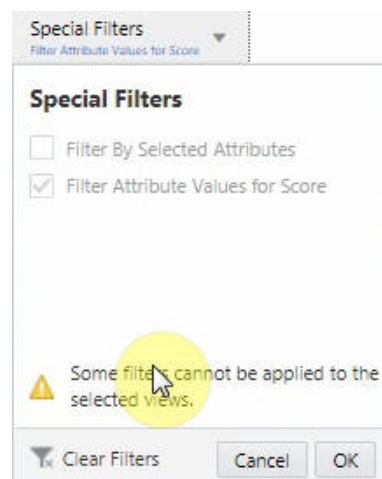
You can select the Special Filters Definition that must apply. The Special Filters Definition is also known as the Position Query Definition (PQD).

Figure 12–2 Select Filter

You can select the views that the selected filter must apply to either one view, more views, or all views under the step. Special filters that have the same measure and query level combination are represented as one option and are applied to multiple views in a step.

Figure 12–3 Select View to Apply Special Filter

If the special filter is not applicable for some views, then you see the message "Some Filters cannot be applied to the selected views" under the special filter LOV with options. Click OK to run the special filter.

Figure 12–4 Special Filters Not Applicable

Special Filters

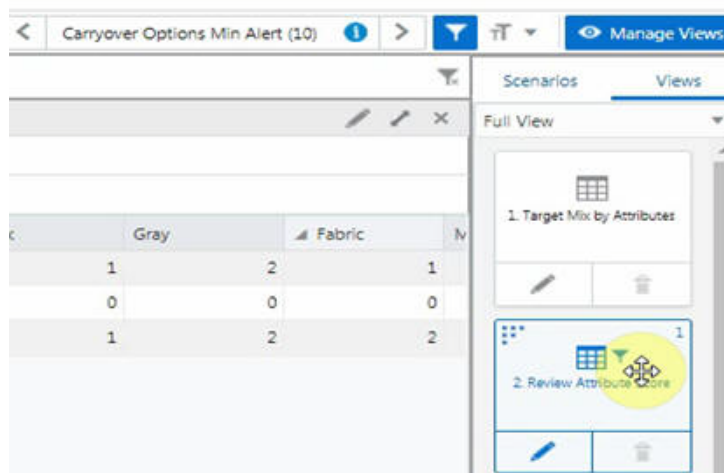
Once the special filter is applied, the positions that do not match the criteria are hidden. You can verify positions using Edit View to view the positions in the hidden area. Any positions that were manually hidden previously will be unhidden if they match the special filter.

When the special filter is turned on, the Special Filter icon on the Quick Access Tool bar appears highlighted and is applied to the view in the view management drawer.

Special filters operate by filtering the positions of the dimensions on the row and the column axes based upon the selected position of one or more dimension on the page axis. As the selected position on the page axis changes, the set of visible row and column positions will update automatically.

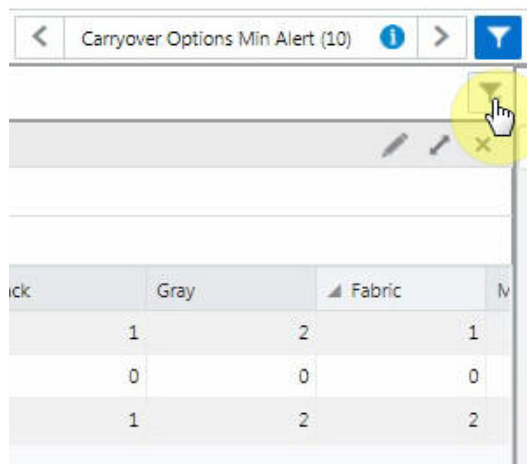
Not all dimensions on the page axis necessarily affect the row and column position filtering. Those dimensions that do affect the filter are called driving dimensions.

Figure 12–5 Verify Positions with Edit View

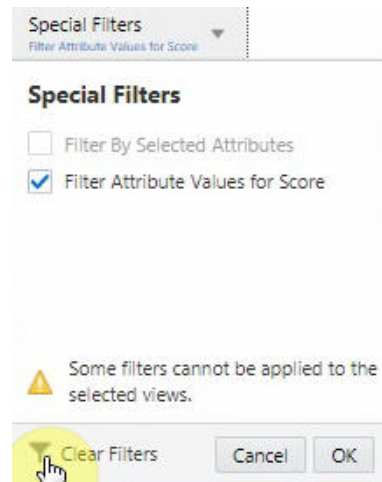


You can clear all the special filters applied by clicking on the Special Filter icon.

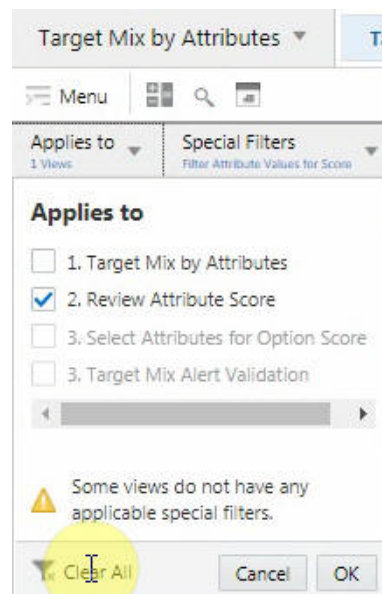
Figure 12–6 Clear Special Filters



You can clear all the special filters applied by clicking on the special filters LOV, clicking **Clear Filters**, and clicking **OK**.

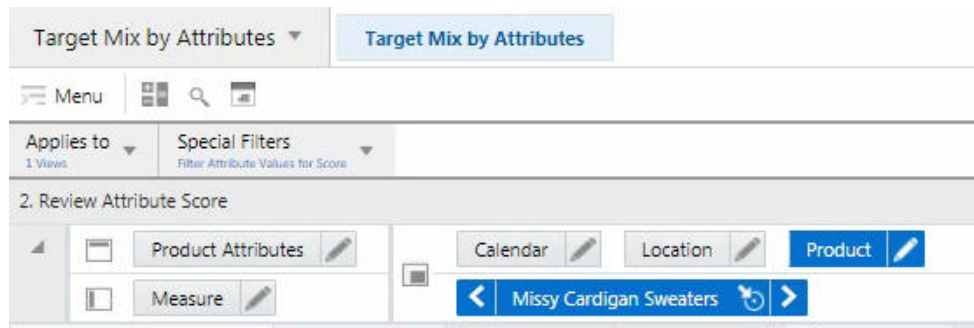
Figure 12–7 Filter Attribute Values

You can clear all the special filters applied to a view by clicking the Applies to LOV, clicking **Clear All**, and clicking **OK**.

Figure 12–8 Clear All

Driving Dimensions

When more than one driving dimension is present, all of the driving dimensions have to be in the Z-axis for the special filter to execute. If one or more driving dimensions are removed from the Z-axis and placed in the X-axis or Y axis, the associated special filters are not executed. A given view can have more than one special filter, driven by one or more dimensions in the Z-axis and driving different dimensions in the X-axis and Y-axis.

Figure 12–9 Driving Dimensions

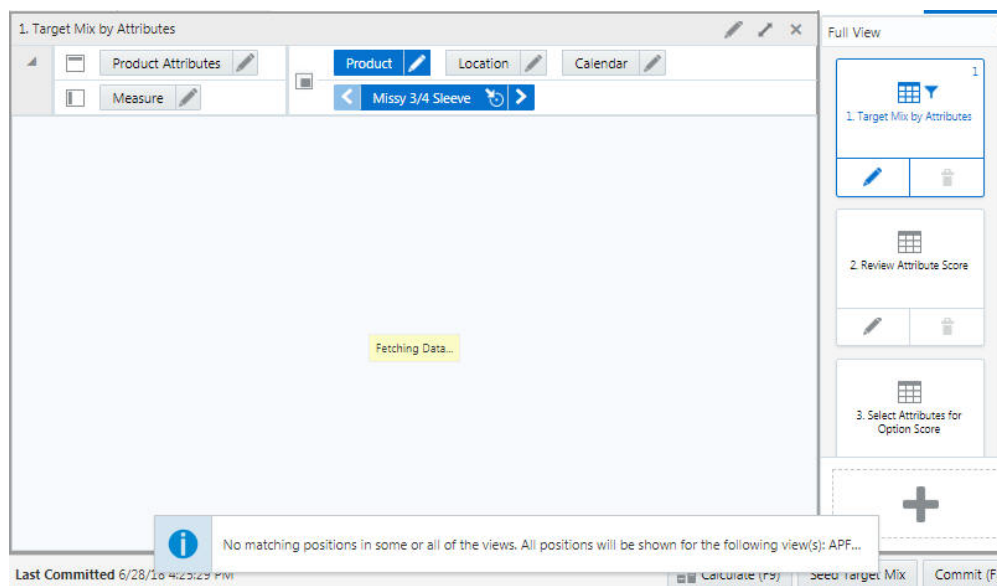
Automatically re-evaluate data after a calculate, refresh, page edge scroll changes, or slice move and view swaps.

Special Filters Without a Driving Dimension

These special filters can be applied to a view similarly to traditional position queries; however, they do not require a page-axis dimension assignment and do not vary if one exists. See the *Oracle Retail Predictive Application Server Cloud Edition Configuration Tools User Guide* for information about creating position queries without a driving dimension.

No Special Filter Matches

If you scroll to a new slice where no position meets the requirements of the special filter, all positions in the view are displayed and a warning is displayed with the message "No matching positions in some or all of the views. All positions will be shown for the views".

Figure 12–10 No Special Filter Matches

Placeholder Maintenance

Placeholder maintenance enables planners to dynamically create, modify, or delete placeholder positions at selected hierarchy levels so that they can plan for future expected items and locations that do not currently exist in the system. As part of system configuration, Placeholder Maintenance must be enabled for the required dimensions and levels. The planner is able to choose the options Use Like Item and Assign Attributes in order to create a placeholder position.

When an informal position is to be made formal, the position's name (a label is not necessary for the update to occur) must first be updated to reflect the correct position name that will be loaded during the load process. Prior to the load, an administrative utility run against the environment to change the status of a position from informal to formal (see the *Oracle Retail Predictive Application Server Administration Guide for the Fusion Client* for more information on the `updateDpmPositionStatus` utility). This process enables the loading and purging of that position through the hierarchy load process and disables further DPM activities on the position.

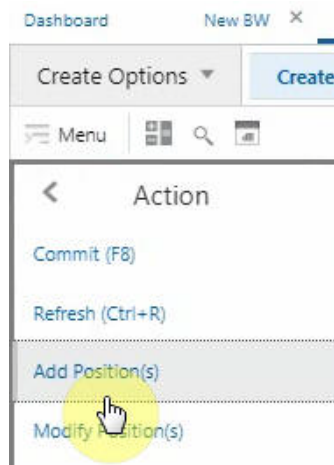
Note that Placeholder Maintenance is also referred to as Dynamic Position Maintenance (DPM).

Adding New Positions to a Dimension

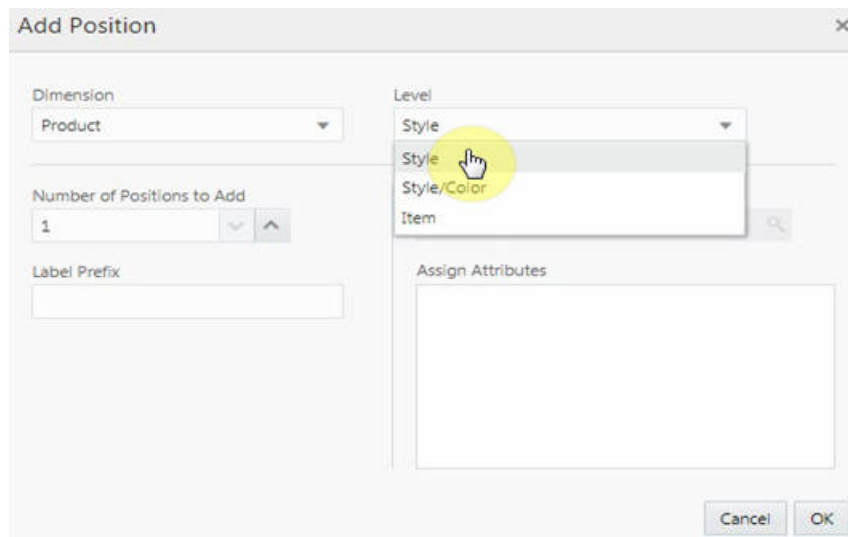
The DPM can be launched from the main menu or the context menu to both add and modify positions.

To add new positions to a dimension, complete the following steps:

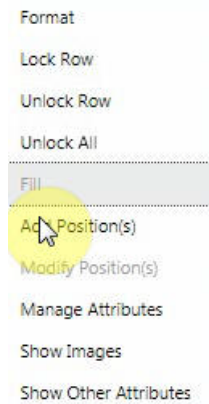
1. From the Action menu, select Add Position(s). The Add Positions dialog box is displayed.

Figure 13–1 Add Positions Option

2. The Add Position dialog box appears with values that default to first option available. The Dimension and Level selection options are always available.
 - You can select the dimension for which you want to create the placeholder positions. Only the list of dimensions for which the DPM functionality enabled is displayed.
 - You can select the level at which you want to create the placeholder positions. The list of levels depend on the dimension selected and also on the user's ability to create new levels.

Figure 13–2 Add Position

Alternatively, you can right-click the position level to access the Add Positions context menu.

Figure 13–3 Add Positions Context Menu

From the context menu, the dimension position are pre-selected based on the launch context.

Figure 13–4 Add Position

3. The Add Product dialog box adds the positions at the launched dimension position level.

Figure 13–5 Add Product

The screenshot shows the 'Add Product' dialog box. The 'Style/Color' section contains a table with the following data:

| Style/Color | Style | Sub-Class | Class | Department | Group | Division | Company | Attributes | Like Position |
|-------------|-------------------------------|-------------------------|----------------|------------|-------|----------|---------|------------|---------------|
| 1 DPN | Contrast Elbow Patch Cardigan | Missy Cardigan Sweaters | Missy Sweaters | Missy | Missy | Tops | Acad's | 23/23 | |

The 'Attributes' section shows a table with the following columns: Level, Attribute Name, Value. It currently displays 'No data to display.' and has a 'Copy Attributes from Like Position' button above it.

You can either enter the number of positions to add or can select the number of positions to add using the up and down arrow keys. You can also create placeholder positions with label prefix by entering the details. The label is used for all the number of positions specified in the Number of Positions to Add field.

The parent positions of the newly added dynamic positions are shown in the tabular layout of the Add Product dialog box. The planner can modify the values of the parent positions if required.

You can choose either of the options Use Like Position or Assign Attributes. For example, if you choose the Use Like Position option, you select a like position by choosing a position from selection list of existing items. If you choose the Assign Attributes option, default attribute values are assigned and the attributes enabled in configuration for that level are displayed.

If you select the Like Position option and then select a position from the list of existing items, you can simplify the process of specifying attribute information for new positions. You can copy the attribute information in part or whole from the Like Position to the new positions using the **Copy Attributes from Like Position** button to avoid having to manually enter the information on an attribute-by-attribute basis.

In addition to copying attribute information from Like Positions, metric information is also copied to the new positions, under the assumption that the new position will perform in a manner similar to the source of the copied metric data. For details on picking the level of history cloning and defining a measure on that level for each dimension that supports Placeholder Maintenance, see the *Oracle Retail Predictive Application Server Cloud Edition Configuration Tools User Guide*.

When a measure is not defined, the user sees the message "Like Position can only be used to copy attributes for the currently selected level." When both measure and attributes are not present, the user sees the message "Like Position is not available for this level." The Like position check box is disabled.

Note: If you select Enter/F2 or double click, the current row becomes editable and if you select Tab, you navigate to the next cell. If you select ESC/F2, you exit from the Edit mode.

For more information regarding keys that can be used in the edit mode, see

<https://www.oracle.com/webfolder/technetwork/jet/index.html>

Figure 13–6 Add Position

The screenshot shows the 'Add Position' dialog box. The 'Dimension' dropdown is set to 'Product' and the 'Level' dropdown is set to 'Style/Color'. The 'Number of Positions to Add' is set to 1, and the 'Label Prefix' is 'DPM'. A search bar contains the text '54291800'. Below the search bar, a list of results is displayed, with the first item '54291800 - Contrast Elbow Patch Cardigan - Black' highlighted. To the right of the list, there are checkboxes for 'Collar', 'Color', and 'Fabric', and dropdown menus for 'Shawl', 'Maroon', and 'Cashmere'. At the bottom right, there are 'Cancel' and 'OK' buttons.

4. Copy the attributes from the like position selected and click **Copy attributes from Like Position**.

Figure 13–7 Copy Attributes

The screenshot shows the 'Add Product' dialog box with the 'Style/Color' tab selected. The 'Attributes' section is expanded, showing a table with columns 'Level', 'Attribute Name', and 'Value'. A yellow circle highlights the 'Copy Attributes from Like Position' button. The table lists attributes: Brand, Collar, Color, and Fabric.

| Level | Attribute Name | Value |
|-------------|----------------|-------|
| Style/Color | Brand | |
| | Collar | |
| | Color | |
| | Fabric | |

When you click the left and right arrow keys, all the hierarchy details are filled for the placeholder position. These keys must be used for updating the alternate hierarchy details of the newly created placeholder position.

- Click **OK** and review the new placeholder position that has been created.

Figure 13–8 Placeholder Position

The screenshot shows the '1. Create Options' dialog box. It contains a table with columns: Like Option, Retail Price, Cost, and IM. The table lists several product options, including '7313/693 - Merino Wool Flutter Cardigan - Dark Pearl', '77316938 - Angled Front Merino Wool Cardigan - Grey', '78498351 - Angled Front Merino Wool Cardigan - Black', and two placeholder positions (DPM0000001 and DPM0000002) for '70063172 - Merino Wool Flutter Cardigan - Black'.

| Like Option | Retail Price | Cost | IM |
|--|---|--------|--------|
| 7313/693 - Merino Wool Flutter Cardigan - Dark Pearl | 248.00 | 101.70 | |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 298.00 | 122.20 | |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 298.00 | 122.20 | |
| DPM0000001 | 70063172 - Merino Wool Flutter Cardigan - Black | 248.00 | 101.70 |
| DPM0000002 | 70063172 - Merino Wool Flutter Cardigan - Black | 248.00 | 101.70 |

Note: The aggregate information (district, region, company, and so on) is populated only if the Add Dynamic Position window is accessed from the right-click menu. If you accessed this window from the Edit menu, these positions are empty

If there are alternate hierarchies, the value can either be selected or added as new if the alternate hierarchy supports dynamic positions. After multiple positions are added for a level in the position tree, the levels above that level can only support single position add or edit.

Modify an Informal Position

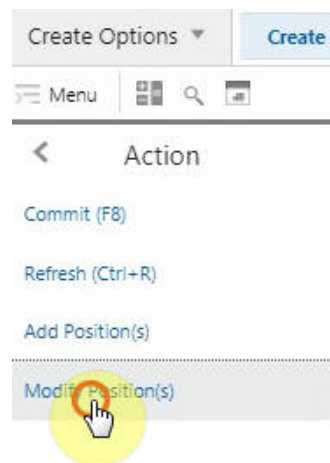
After dynamic positions are added to the hierarchy, the DPM process allows you to:

- Change the parent of a dynamic position to a different formal or dynamic parent.
- Update the position name and position label.

Note: Only dynamic positions can be modified using the DPM feature. The Modify menu is not visible if there are no dynamic positions in the workspace.

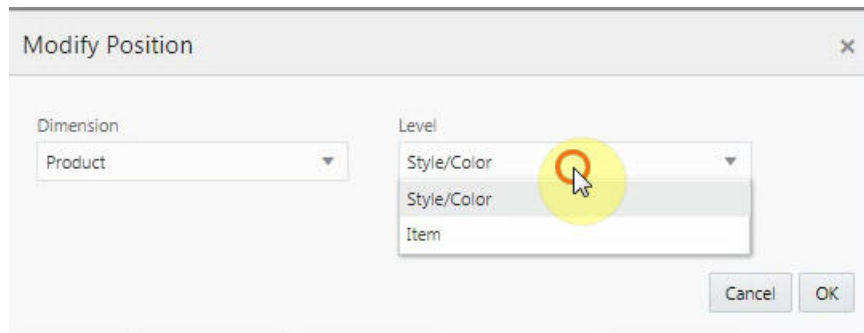
1. Launch Modify Position(s) from the Action menu. Select the dimension and level in the Modify Position dialog box for the placeholder positions that must be modified.

Figure 13–9 Modify Positions



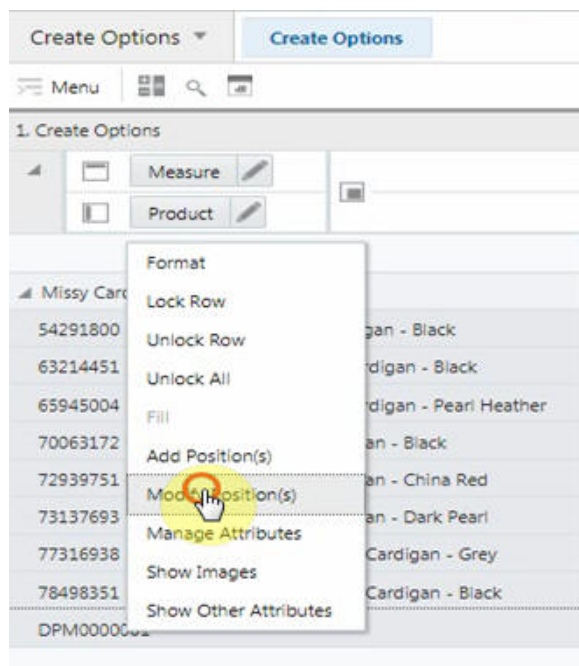
2. The Modify Dynamic Position window appears. Select the dimension and level at which you want to modify the dynamic position.

Figure 13–10 Modify Position



3. Alternatively, you can right click one of the position and select **Modify Position(s)** in the right click menu. The Modify Position dialog box shows the positions at the launched dimension placeholder positions for modifying.

Figure 13–11 Modify Position



4. The Modify Product window appears. Select the existing dynamic position and modify the position label or position name. Or, select any parent to change the parent values of the dynamic position that has been created. The parent can be Style/Sub-Class/Class and so on, or an alternative hierarchy. You can also see that the Like Position column of the dialog box contains the like position you set during the position creation.

Figure 13–12 *Modify Product*

Modify Product

Style/Color

Actions View + X

| Style/Color | Style | Sub-Class | Class | Department | Group | Division | Company | Attributes | Like Position |
|--------------|-------------------------------|-------------------------|----------------|------------|-------|----------|---------|------------|---------------|
| 1 DPM0000001 | Contrast Elbow Patch Cardigan | Missy Cardigan Sweaters | Missy Sweaters | Missy | Missy | Tops | Acadia | 6/23 | |

Attributes

View Copy Attributes from Like Position

| Level | Attribute Name | Value |
|---------------------|----------------|-------|
| No data to display. | | |

Cancel OK

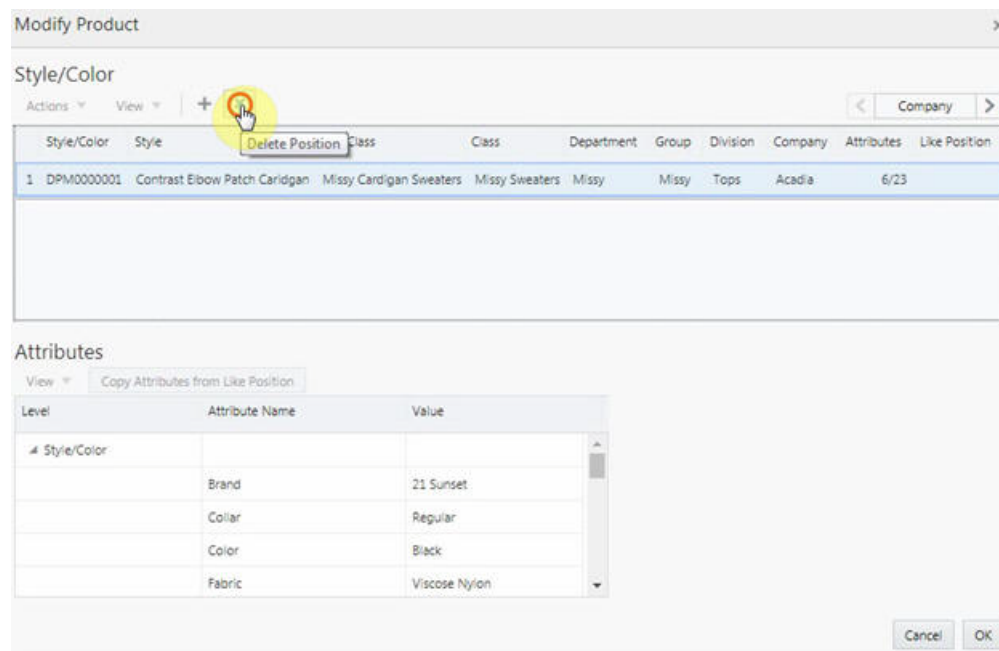
- When finished, click **OK** to save and close.

Delete an Informal Position

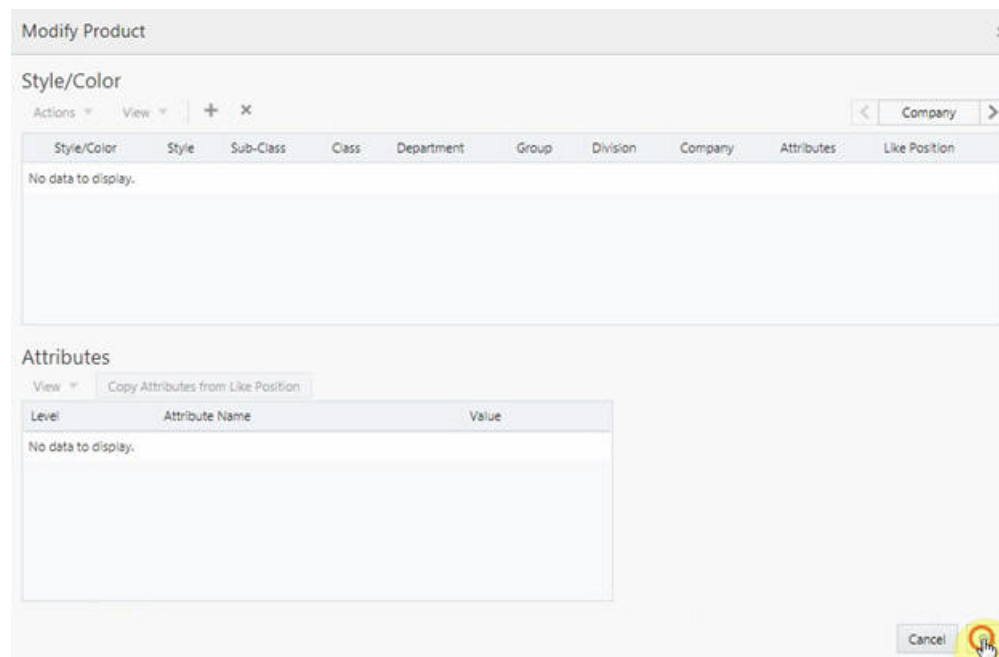
After a dynamic position is added, you can delete it and all child positions to which it is a parent.

Note: Only dynamic positions can be deleted using the DPM feature. The delete option is not visible if there are no dynamic positions in the workbook.

- Right-click the dynamic position you want to delete.
- From the right-click menu, select **Modify Position** and then click **X** to delete the specific placeholder position.




Figure 13–13 Delete Position

3. The Delete Dynamic Position dialog box appears to indicate the dynamic position that will be deleted and any child positions associated with it that will be deleted as well. Click **OK**.

Figure 13–14 After Deletion

4. Click **OK** to save and close the dialog box. The dynamic position is removed from the view.

Figure 13–15 Placeholder Position Removed

| Create Options ▾ Create Options | | | | | | |
|--|-------------|-----------------|----------------|-------|-------------------|--|
| Menu    | | | | | | |
| 1. Create Options | | | | | | |
| <div> <div> <div>Measure</div> <div>Product</div> </div> <div></div> </div> | | | | | | |
| | Like Option | Base Unit Price | Base Unit Cost | IMU % | Select Size Range | |
| Missy Cardigan Sweaters | ▼ | 20.79 | 9.40 | 55.2% | ▼ | |
| 54291800 - Contrast Elbow Patch Cardigan - Black | ▼ | 13.99 | 5.00 | 64.3% | ▼ | |
| 63214451 - Waffle Knit Shawl Collar Cardigan - Black | ▼ | 19.99 | 10.00 | 50.0% | ▼ | |
| 65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather | ▼ | 19.99 | 10.00 | 50.0% | ▼ | |
| 70063172 - Merino Wool Flutter Cardigan - Black | ▼ | 0.00 | 0.00 | 0.0% | ▼ | |
| 72939751 - Merino Wool Flutter Cardigan - China Red | ▼ | 0.00 | 0.00 | 0.0% | ▼ | |
| 73137693 - Merino Wool Flutter Cardigan - Dark Pearl | ▼ | 0.00 | 0.00 | 0.0% | ▼ | |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | ▼ | 24.99 | 11.00 | 56.0% | ▼ | |
| 78498351 - Angled Front Merino Wool Cardigan - Black | ▼ | 24.99 | 11.00 | 56.0% | ▼ | |

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

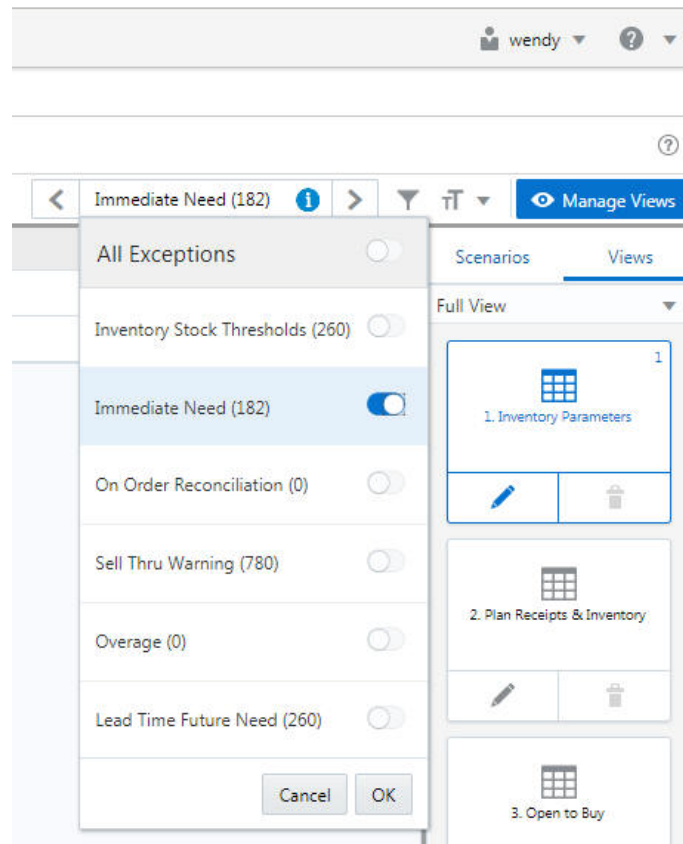
For each condition that can be produced by the alert measure's rule, a style can be defined. You can modify the styles via the Format dialog in Edit Styles and Exceptions. The styles are used to format target measure cells with the condition, and the message is displayed as part of the tooltip information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

Working with Real Time Alerts

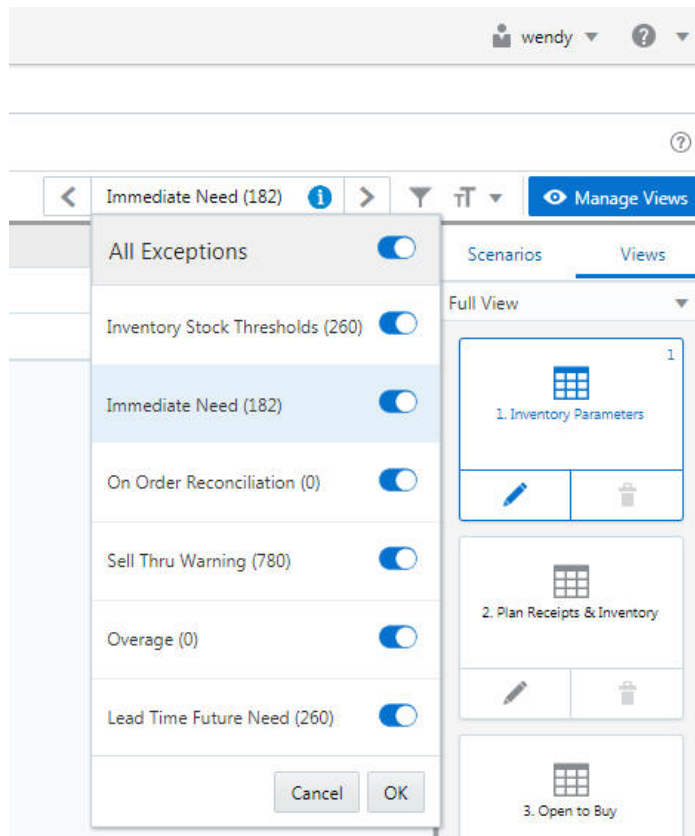
When you open a workspace, the real time alert hits are calculated and displayed. They are refreshed every time you click Calculate or invoke operations such as Custom Menu Executions or as part of the Commit process.

Alerts on the Quick Access Toolbar

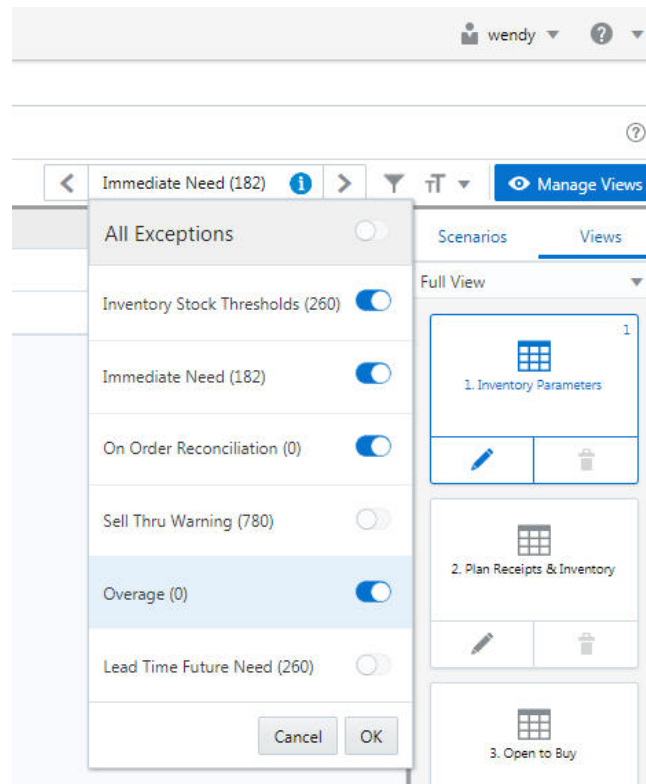
The toolbar contains an exception list that shows all the available alerts. Users can choose either all exceptions or the exceptions that are priority for resolution. The number beside the icon shows the number of hits for the currently active real time alert for the entire workbook.

Figure 14–1 Quick Access Toolbar Alerts

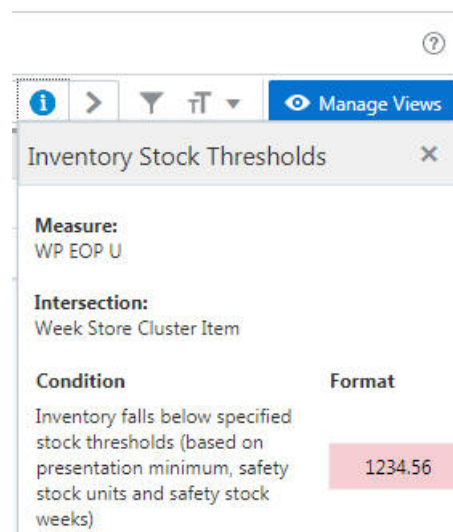
Click **All Exceptions** and then **OK** to select all the exceptions for alert navigation.

Figure 14–2 Select All Exceptions for Alerts

You can either select one or multiple exceptions.

Figure 14-3 Select Multiple Exceptions for Alerts

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 14-4 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 14–5 Alert Navigation Intersections


Dashboard preseason X

Inventory Stock Thresholds (Alert Navigation Mode) Done


Menu   


<


Inventory Stock Thresholds (1 of 772)





>











Manage Views


1. Plan Receipts & Inventory   X


Calendar 




Product 



Measure 

Location 

<

/ C / C 

>

| | | 8/8/2020 | 8/15/2020 | 8/22/2020 | 8/29/2020 | 9/5/2020 |
|--|----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| 54291800 - Contrast Elbow Patch Caridgan - Black | WP Event | | | | | |
| | Selling Weeks | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| | - | | | | | |
| | WP BOP U | 4 | 4 | 4 | 4 | |
| | WP Net Sales U | 3 | 2 | 1 | 0 | |
| | WP Receipts U | 3 | 2 | 1 | 0 | |
| | WP EOP U | 4 | 4 | 4 | 4 | |
| | WP WOS | 26.25 | 25.75 | 25.00 | 24.00 | |
| | WP Sell Thru % | 0.0% | 0.0% | 0.0% | 0.0% | |

You can see that now you are in alert navigation mode, as highlighted in [Figure 14–6](#).

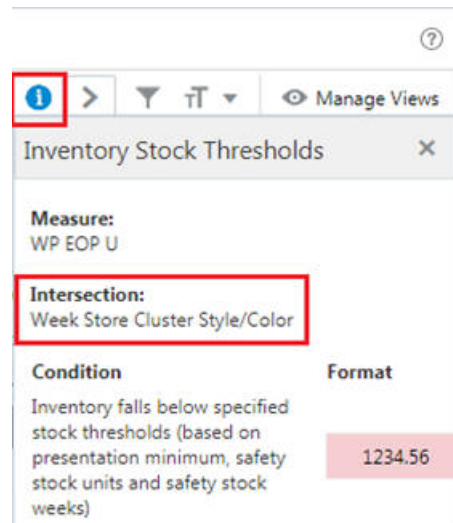
Figure 14–6 Alert Navigation Mode

Dashboard preseason x

Inventory Stock Thresholds (Alert Navigation Mode) Done

Menu < Inventory Stock Thresholds (1 of 772) > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > < > <

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 14–7 View 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 14–8 Resolving Alerts

The screenshot shows a table titled 'Inventory Stock Thresholds (Alert Navigation Mode)'. The table has columns for dates: 8/1/2020, 8/8/2020, 8/15/2020, 8/22/2020, and 8/29/2020. The rows represent various metrics for '54291800 - Contrast Elbow Patch Carigan - Black'. The 'WP EOP U' row is highlighted in red, and the 'WP WOS' row is also highlighted in red. The 'WP EOP U' row has a red box around the value '4' in the 8/8/2020 column.

| | 8/1/2020 | 8/8/2020 | 8/15/2020 | 8/22/2020 | 8/29/2020 |
|----------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| WP Event | | | | | |
| Selling Weeks | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| WP BOP U | 0 | 4 | 4 | 4 | 4 |
| WP Net Sales U | 0 | 3 | 2 | 1 | 1 |
| WP Receipts U | 0 | 3 | 2 | 1 | 1 |
| WP EOP U | 0 | 4 | 4 | 4 | 4 |
| WP WOS | 0.00 | 26.25 | 25.75 | 25.00 | 25.00 |
| WP Sell Thru % | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

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

Figure 14–9 Moving Between Alerts During Resolution

Dashboard preseason X

Inventory Stock Thresholds (Alert Navigation Mode) Done

Menu Inventory Stock Thresholds (2 of 772) Manage Views

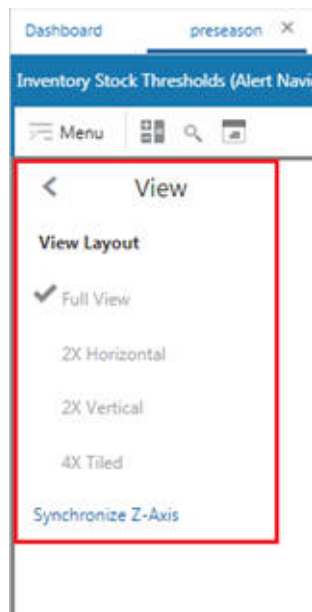
1. Plan Receipts & Inventory

Calendar Location / C / C

| | 8/1/2020 | 8/8/2020 | 8/15/2020 | 8/22/2020 | 8/29/2020 |
|--|----------|-------------------------------------|-------------------------------------|-------------------------------------|-----------|
| 54291800 - Contrast Elbow Patch Caridgan - Black | | | | | |
| WP Event | | | | | |
| Selling Weeks | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| WP BOP U | 0 | 4 | 4 | 4 | |
| WP Net Sales U | 0 | 3 | 2 | 1 | |
| WP Receipts U | 0 | 3 | 2 | 1 | |
| WP EOP U | 0 | 4 | 4 | 4 | |
| WP WOS | 0.00 | 26.25 | 25.75 | 25.00 | |
| WP Sell Thru % | 0.0% | 0.0% | 0.0% | 0.0% | |

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 14–10 View Layout

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

Figure 14–11 Exit Alert Navigation Mode

Dashboard | preseason X

Inventory Stock Thresholds (Alert Navigation Mode) Done

Menu | Inventory Stock Thresholds (2 of 772) | Manage Views

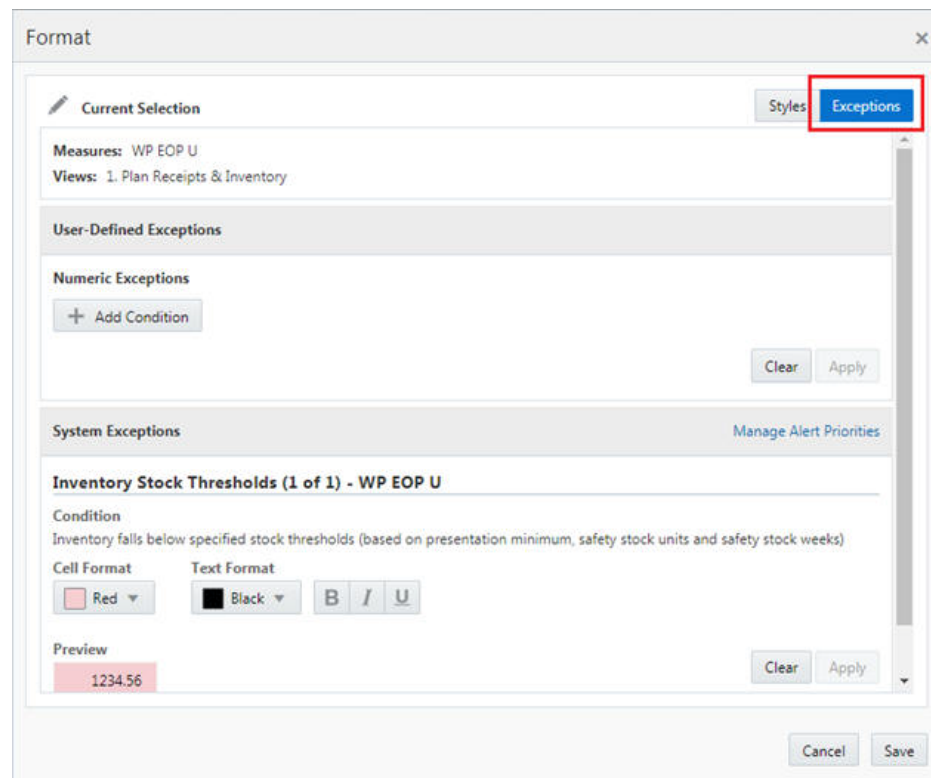
1. Plan Receipts & Inventory

Calendar | Product | Measure | Location | / C / C

| | 8/1/2020 | 8/8/2020 | 8/15/2020 | 8/22/2020 | 8/29/2020 |
|--|----------|-------------------------------------|-------------------------------------|-------------------------------------|-----------|
| 54291800 - Contrast Elbow Patch Caridgan - Black | | | | | |
| WP Event | | | | | |
| Selling Weeks | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| WP BOP U | 0 | 4 | 4 | 4 | |
| WP Net Sales U | 0 | 3 | 2 | 1 | |
| WP Receipts U | 0 | 3 | 2 | 1 | |
| WP EOP U | 0 | 4 | 4 | 4 | |
| WP WOS | 0.00 | 26.25 | 25.75 | 25.00 | |
| WP Sell Thru % | 0.0% | 0.0% | 0.0% | 0.0% | |

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 14–12 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.

Position Filtering

Position Filtering is a convenient way to filter a large set of data in a view down to a subset of data that you want to focus on. With Position Filtering, a set of selected data cells in one view can be used to filter the positions shown in another view.

For example if one view shows a summary of targets by subclass, cluster (locations), and calendar and a second view shows a detailed breakdown of the assortment plan by style/color, cluster, and calendar you can use position filtering to quickly narrow your focus on the detail view to only those style/colors in a particular subclass to see how the style/color plan is comparing to the subclass target. Position filtering can be used similar to a drill-in workflow where you would move from a high-level view into more details, however with position filtering you choose the view to 'drill-into' instead of it being prescribed for you.

Position filtering is extremely flexible

- When applied to the current view it acts as a rapid show/hide, hiding all unselected cells.
- When using selections in the current view to filter a second view, all dimensions that are common in the second view will be filtered.

In [Figure 15-1](#), a set of positions is selected in a single view. When position filtering is applied, the cells displayed in the view are reduced to those specified by the selected positions.

Figure 15–1 Position Filtering in a Single View




Table 1: Create Options (Initial View)

| | Retail Price | Cost | IMU % | Select Size Range | Export Placeholder to RMS |
|--|--------------|-------|-------|-------------------|---------------------------|
| Missy Cardigan Sweaters | 148.89 | 61.08 | 59.0% | ▼ | <input type="checkbox"/> |
| 54291800 - Contrast Elbow Patch Cardigan - Black | 130.00 | 53.59 | 58.8% | ▼ | <input type="checkbox"/> |
| 63214451 - Waffle Knit Shawl Collar Cardigan - Black | 100.00 | 37.88 | 62.1% | ▼ | <input type="checkbox"/> |
| 65945004 - Waffle Knit Shawl Collar Cardigan - Pearl | 100.00 | 41.98 | 58.0% | ▼ | <input type="checkbox"/> |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 200.00 | 80.65 | 59.7% | ▼ | <input type="checkbox"/> |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 200.00 | 80.65 | 59.7% | ▼ | <input type="checkbox"/> |
| 70063172 - Merino Wool Flutter Cardigan - Black | 160.00 | 67.12 | 58.1% | ▼ | <input type="checkbox"/> |
| 72939751 - Merino Wool Flutter Cardigan - China Red | 160.00 | 67.12 | 58.1% | ▼ | <input type="checkbox"/> |
| 73137693 - Merino Wool Flutter Cardigan - Dark Pearl | 160.00 | 67.12 | 58.1% | ▼ | <input type="checkbox"/> |
| New Cardigan Sweater - Elbow Patch - Black | 130.00 | 53.59 | 58.8% | ▼ | <input type="checkbox"/> |
| Shimmer Sweater000004 | 0.00 | 0.00 | 0.0% | ▼ | <input type="checkbox"/> |
| Missy Cold Shoulder Sweaters | 83.33 | 35.33 | 57.6% | ▼ | <input type="checkbox"/> |
| 67150969 - Cold Shoulder Cable Knit Sweater - Pearl | 100.00 | 45.01 | 55.0% | ▼ | <input type="checkbox"/> |
| 56453938 - Cold Shoulder Zip Sweater - Moss | 75.00 | 30.40 | 59.3% | ▼ | <input type="checkbox"/> |
| 56659560 - Cold Shoulder Zip Sweater - Black | 75.00 | 30.40 | 59.3% | ▼ | <input type="checkbox"/> |
| New Cold Shoulder Sweater Black | 0.00 | 0.00 | 0.0% | ▼ | <input type="checkbox"/> |
| New Cold Shoulder Sweater Blue | 0.00 | 0.00 | 0.0% | ▼ | <input type="checkbox"/> |

Filter

Table 2: Create Options (Filtered View)

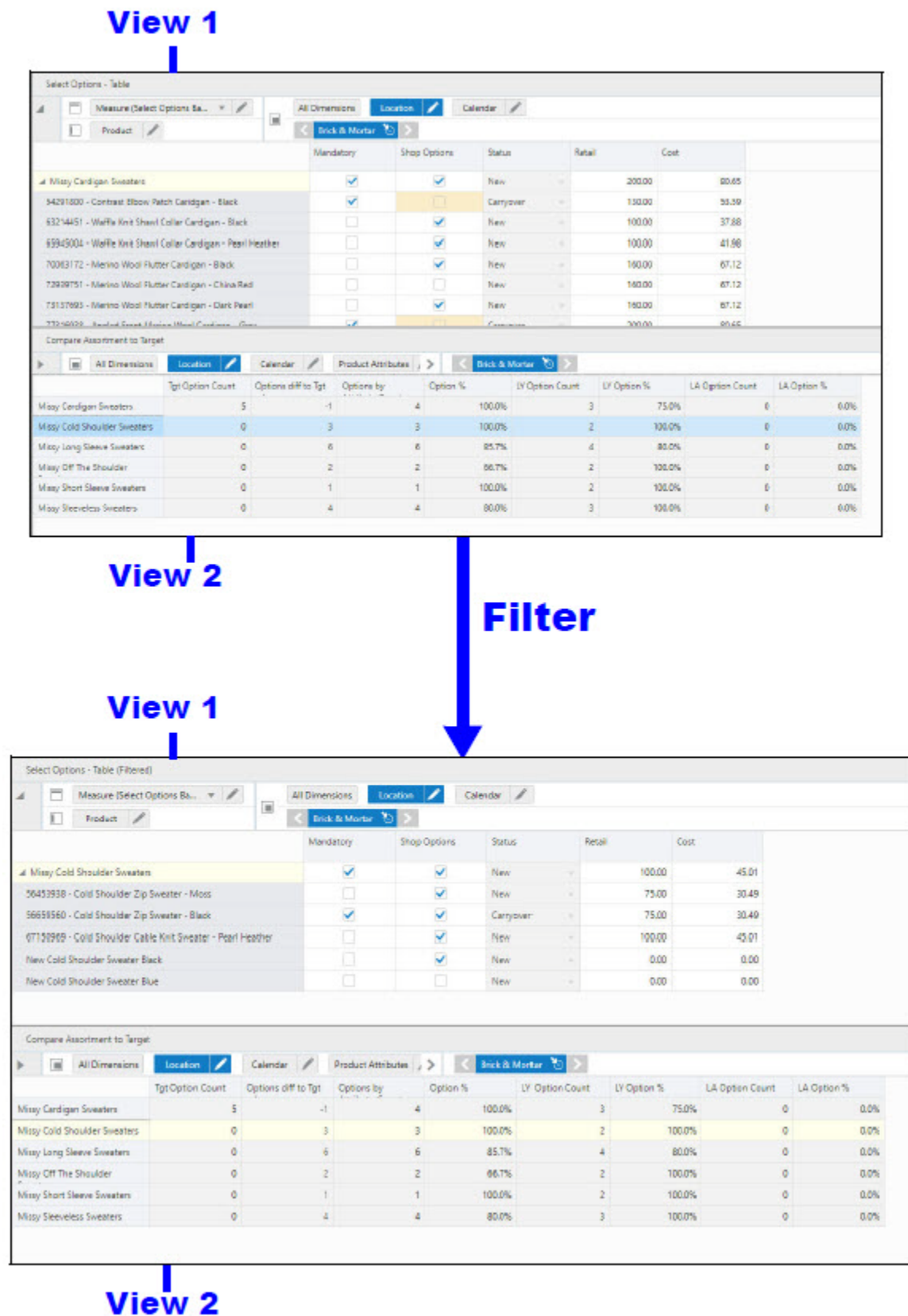
| | Retail Price | Cost | IMU % | Select Size Range | Export Placeholder to RMS |
|--|--------------|-------|-------|-------------------|---------------------------|
| Missy Cardigan Sweaters | 148.89 | 61.08 | 59.0% | ▼ | <input type="checkbox"/> |
| 54291800 - Contrast Elbow Patch Cardigan - Black | 130.00 | 53.59 | 58.8% | ▼ | <input type="checkbox"/> |
| 63214451 - Waffle Knit Shawl Collar Cardigan - Black | 100.00 | 37.88 | 62.1% | ▼ | <input type="checkbox"/> |
| 65945004 - Waffle Knit Shawl Collar Cardigan - Pearl | 100.00 | 41.98 | 58.0% | ▼ | <input type="checkbox"/> |
| 77316938 - Angled Front Merino Wool Cardigan - Grey | 200.00 | 80.65 | 59.7% | ▼ | <input type="checkbox"/> |
| 78498351 - Angled Front Merino Wool Cardigan - Black | 200.00 | 80.65 | 59.7% | ▼ | <input type="checkbox"/> |
| 70063172 - Merino Wool Flutter Cardigan - Black | 160.00 | 67.12 | 58.1% | ▼ | <input type="checkbox"/> |
| 72939751 - Merino Wool Flutter Cardigan - China Red | 160.00 | 67.12 | 58.1% | ▼ | <input type="checkbox"/> |
| 73137693 - Merino Wool Flutter Cardigan - Dark Pearl | 160.00 | 67.12 | 58.1% | ▼ | <input type="checkbox"/> |
| New Cardigan Sweater - Elbow Patch - Black | 130.00 | 53.59 | 58.8% | ▼ | <input type="checkbox"/> |
| Shimmer Sweater000004 | 0.00 | 0.00 | 0.0% | ▼ | <input type="checkbox"/> |

In [Figure 15-2](#), a set of positions is selected in View 2 (blue highlighted line). When the position filter is applied the positions in View 1 are filtered to match those selected by the position filter in View 2.

Position filtering can be applied to multiple views. For example, provided the workbook has been configured to contain those views, position filters can be applied progressively.

It is possible to create these position filters in multiple steps. You can apply a position filter in first view to the second view and then apply a position filter to a third view.

Figure 15–2 Position Filtering in Two Views



Working with Position Filters

This section describes the basics of working with position filters.

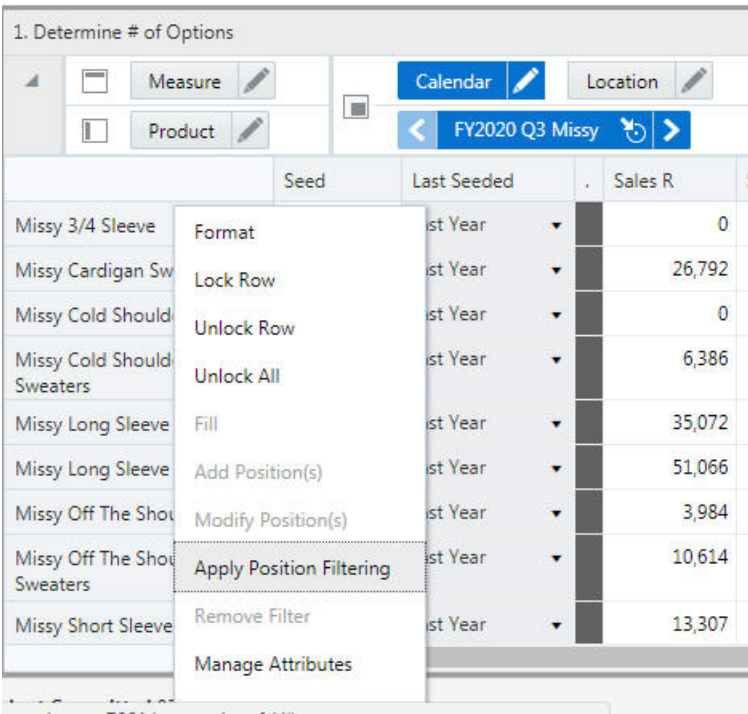
Initiating Position Filtering

The position filtering option is available from the menu when you right click on a position from the selected row or column of a specified set of cells.

Selecting from Row or Column

Position filtering can also be initiated by selecting from a row or column. The right click menu can be used to initiate position filtering, as shown in [Figure 15-3](#). It can be applied to the current view or to other views in the worksheet.

Figure 15-3 Position Filtering from Row or Column



Selecting from Cells

Position filtering can also be initiated by selecting one or more cells using the right click menu, as shown in [Figure 15-4](#). It can be applied to the current view or to other views in the worksheet.

Figure 15–4 Selecting Position Filtering from Cells

1. Determine # of Options

| | Seed | Last Seeded | Sales R | S |
|---------------------------------|------|-------------|---------|-----|
| Missy 3/4 Sleeve | ▼ | Last Year ▼ | 0 | |
| Missy Cardigan Sweaters | ▼ | Last Year ▼ | 26,792 | |
| Missy Cold Shoulder | ▼ | Last Year ▼ | 0 | |
| Missy Cold Shoulder Sweaters | ▼ | Last Year ▼ | 6,386 | |
| Missy Long Sleeve | ▼ | Last Year ▼ | 35,072 | |
| Missy Long Sleeve | ▼ | Last Year ▼ | 51,066 | 227 |
| Missy Off The Shoulder | ▼ | Last Year ▼ | 3,984 | 41 |
| Missy Off The Shoulder Sweaters | ▼ | Last Year ▼ | 10,614 | 85 |
| Missy Short Sleeve | ▼ | Last Year ▼ | 13,307 | 63 |

Format

- Lock Cells
- Unlock Cells
- Unlock All
- Fill
- Apply Position Filtering
- Remove Filter

Using Position Filters

Position filters can be applied to all views in the current workbook.

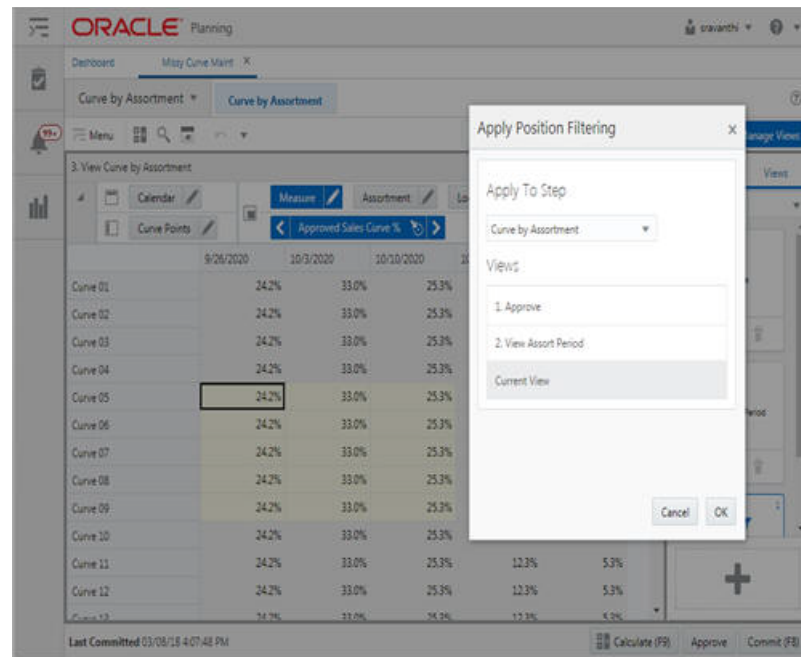
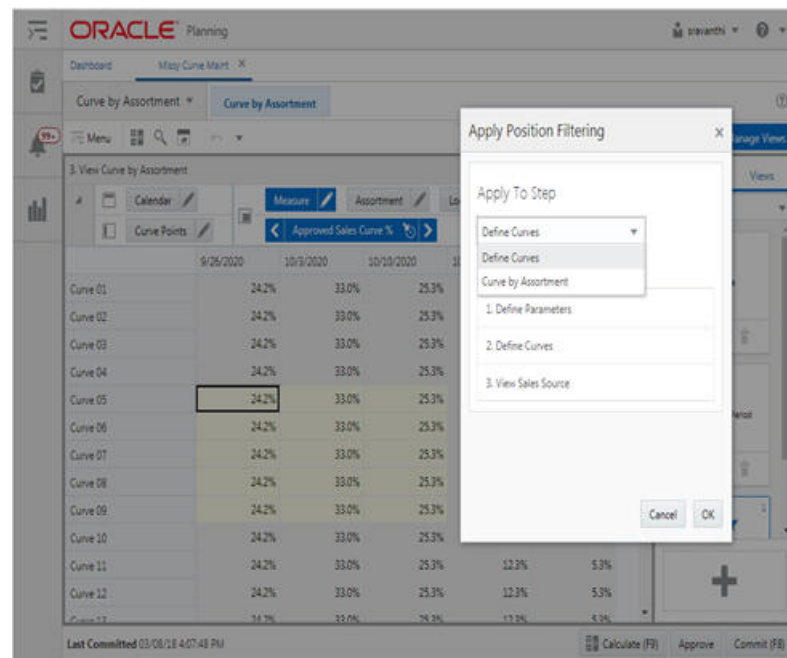
- You can filter the current view. The current view will be filtered to show only those rows and columns selected in the filter. This is equivalent to using the Show and Hide options in the Edit View dialog box for any dimension.
- You can filter another view in the workbook. For this to be effective, the workbook template must be configured with two or more views. There must also be one dimension hierarchy in common with both the views or a filter cannot be applied.

If the worksheet template is only configured to show a single view, only the Current View option will be available in the Apply Position Filtering dialog box.

In [Figure 15–5](#) and [Figure 15–6](#), a worksheet has been opened for the Curve by Assortment step. The available views are the Current View: 1. Approve and 2. View Assort Period. The previous task (Define Curves) also has three views available: 1. Define Parameters, 2. Define Curves, and 3. View Sales Source.

- If you select one of the other views in the current step (Approve or View Assort Period), the selected view will be filtered to show only the specified data.
- If you select a view in the Define Curves step, the views will switch to the Define Curves step views and the specified view will be filtered to show only the specified data.

Once the filter has been applied, the view to which the filters have been applied becomes the current view.

Figure 15–5 Applying Position Filter on a View in Current Step**Figure 15–6 Applying Position Filter on a View in Different Step**

After the filter is applied, you will receive a snack bar notification. The view title will be appended with (Filtered) text and a funnel (filter) icon will be shown in the view tile in Manage Views, as shown in [Figure 15–7](#).

Figure 15–7 Position Filtering Icon and Filtered View

| | A / Cold / Conservative |
|------------------------------|-------------------------|
| Missy Cold Shoulder Sweaters | 3 |
| Missy Long Sleeve | 10 |
| Missy Long Sleeve | 12 |
| Missy Off The Shoulder | 2 |

Tiling Views

One way of working with position filters is to tile the views. This can be done from the Manage Views menu on the Quick Access Toolbar. In this way, two or more views can be shown simultaneously. The filter can then be applied to one of the views, leaving the filtered data displayed in another view, as shown in [Figure 15–8](#).

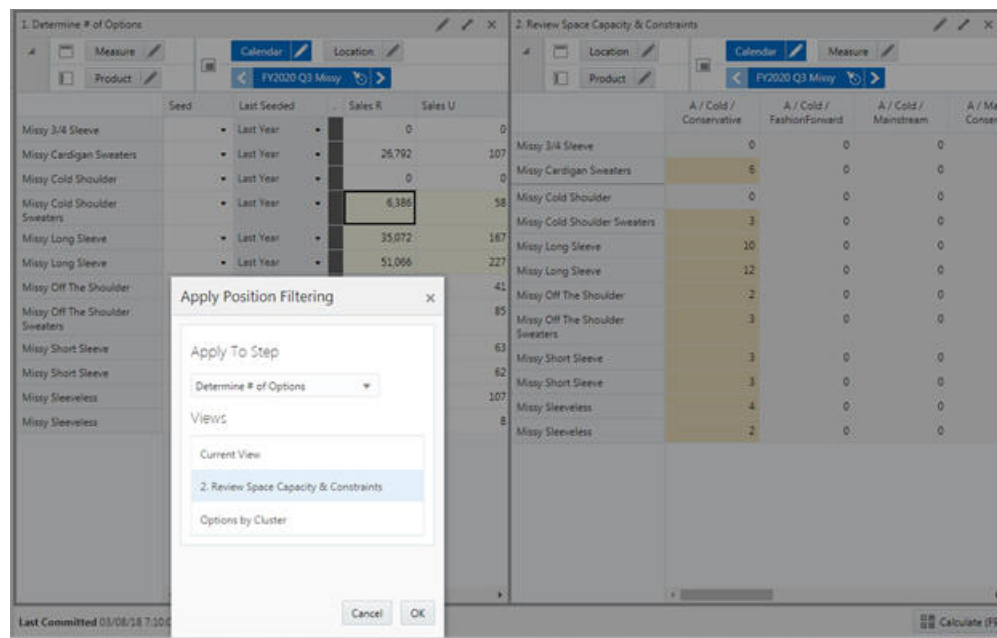
Figure 15–8 Tiling Views

| | Seed | Last Seeded | Sales R | Sales U |
|---------------------------------|------|-------------|---------|---------|
| Missy 3/4 Sleeve | ▼ | Last Year | 0 | 0 |
| Missy Cardigan Sweaters | ▼ | Last Year | 26,792 | 107 |
| Missy Cold Shoulder | ▼ | Last Year | 0 | 0 |
| Missy Cold Shoulder Sweaters | ▼ | Last Year | 6,386 | 58 |
| Missy Long Sleeve | ▼ | Last Year | 35,072 | 167 |
| Missy Long Sleeve | ▼ | Last Year | 51,066 | 227 |
| Missy Off The Shoulder | ▼ | Last Year | 3,984 | 41 |
| Missy Off The Shoulder Sweaters | ▼ | Last Year | 10,614 | 89 |
| Missy Short Sleeve | ▼ | Last Year | 13,307 | 63 |
| Missy Short Sleeve | ▼ | Last Year | 14,995 | 62 |
| Missy Sleeveless | ▼ | Last Year | 18,661 | 107 |
| Missy Sleeveless | ▼ | Last Year | 750 | 8 |

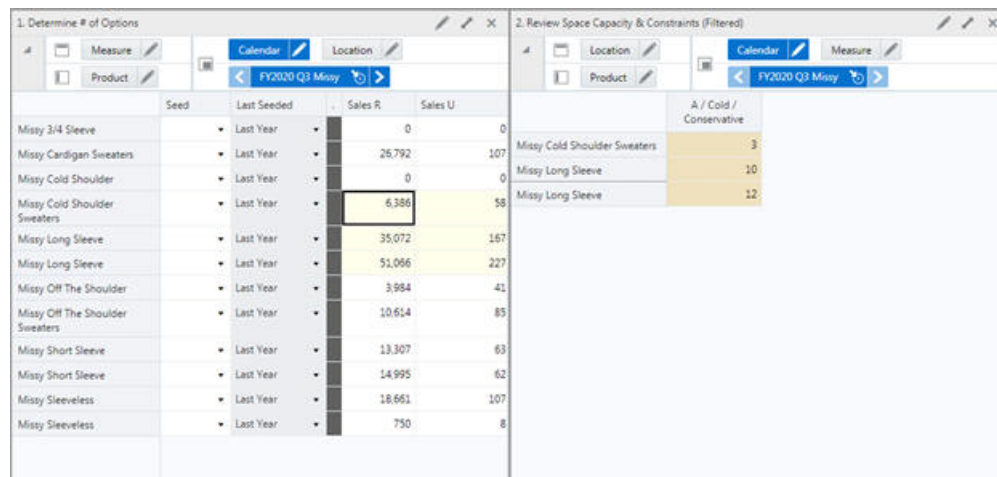
| | A / Cold / Conservative |
|------------------------------|-------------------------|
| Missy Cold Shoulder Sweaters | 3 |
| Missy Long Sleeve | 10 |
| Missy Long Sleeve | 12 |

Example of Applying Position Filters

In the example shown in [Figure 15–9](#) and [Figure 15–10](#), two views are open. A set of positions are selected in the left hand view and the right hand view is selected from the Position Filtering option using the right click menu.

Figure 15–9 Example of Position Filtering: Stage 1

The positions selected for position filtering are highlighted during the selection process. They remain highlighted after the position filtering operation so that the user can see which rows are in use for position filtering.

Figure 15–10 Example of Position Filtering: Stage 2

When the position filter is applied, the right hand view is restricted to those positions selected with the position filter in the left hand view. Filtering is based on all dimensions found in the row, column, and page (x, y and z) axes.

In the example shown in [Figure 15–9](#) and [Figure 15–10](#), the position filter has been used in the left hand view to select a subset of items from the total range available. The right hand view now only contains data restricted to this items.

For example, you may want to isolate data restricted to a range of items covering a promotional campaign for those particular products. As the promotional campaign may increase the quantities sold over the duration of the promotion, position filtering can make it easier for you to focus on the data pertinent to an advertising campaign.

This is an effective way to open a workbook with a large amount of data and then use position filters to isolate a subset of the data to edit.

Page Edge Synchronization

When a position filter is applied, the information in the page edge is also filtered. If the Synchronize Page Edge option has been selected, synchronized page edge navigation may not always be possible if a position filter has been applied.

Figure 15–11 Position Filtering: Page Edge Synchronization

The screenshot shows two side-by-side windows from the Oracle Retail Predictive Application Server Cloud Edition User Guide.

View 1: Determine # of Options

| | Sales U | Sales AUR | GM R | GM R % |
|-------------------------|---------|-----------|---------|--------|
| Missy | 925 | 151.58 | 65.420 | |
| Missy Sweaters | 588 | 118.16 | 23.166 | |
| Missy Cardigan Sweaters | 107 | 249.81 | 15.884 | |
| Missy Cold Shoulder | 58 | 0.52 | -2.652 | -88 |
| Missy Long Sleeve | 167 | 0.12 | -14.694 | -734 |
| Missy Off The Shoulder | 85 | 124.58 | 5.928 | |
| Missy Short Sleeve | 63 | 210.23 | 7.814 | |
| Missy Sleeveless | 107 | 174.97 | 10.886 | |
| Missy Tops | 338 | 209.76 | 42.254 | |
| Missy 3/4 Sleeve | 0 | 0.00 | 0 | |
| Missy Cold Shoulder | 0 | 0.00 | 0 | |
| Missy Long Sleeve | 227 | 224.71 | 30.662 | |
| Missy Off The Shoulder | 41 | 97.64 | 2.425 | |
| Missy Short Sleeve | 62 | 242.63 | 8.733 | |
| Missy Sleeveless | 8 | 98.00 | 435 | |

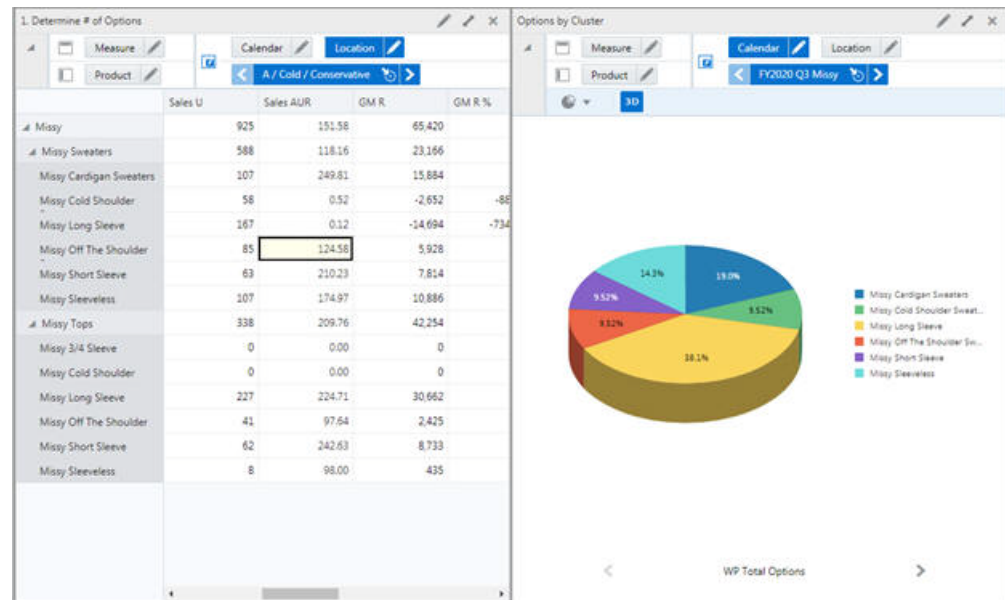
View 2: Review Space Capacity & Constraints (Filtered)

| | Max # of Options | Min # of Options | Below/Above # of | WP Total Op |
|-------------------------|------------------|------------------|------------------|-------------|
| Missy Cardigan Sweaters | 0 | 0 | 4 | |
| Missy Cold Shoulder | 0 | 0 | 2 | |

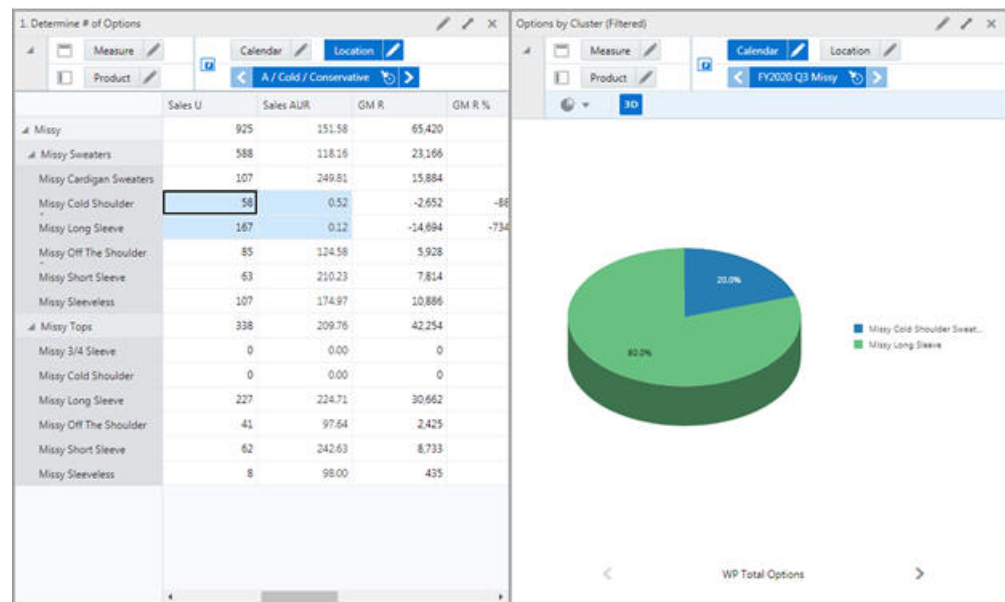
In [Figure 15–11](#), a position filter has been applied to View 2. Review Space Capacity & Constraints. This results in a single position, A/Cold/Conservative. If you now go to View 1. Determine # of Options and use the page edge controls to scroll through the available locations, View 2 cannot synchronize because it only has a single location position. This situation will persist until more locations are made visible when another position filter is applied (or the Show and Hide option is used).

Position Filtering and Charts

Position filtering updates charts. Where positions are hidden by the position filter, the graph is updated to reflect the changed data. In [Figure 15–12](#), the pie chart is showing data for all stores in the district of France.

Figure 15–12 Chart Before Position Filter is Applied

A position filter is then applied. As a result, the district of France is filtered so that only three stores are visible. The pie chart is updated accordingly, as shown in [Figure 15–13](#).

Figure 15–13 Chart After Position Filter is Applied

Factors Affecting the Use of Position Filters

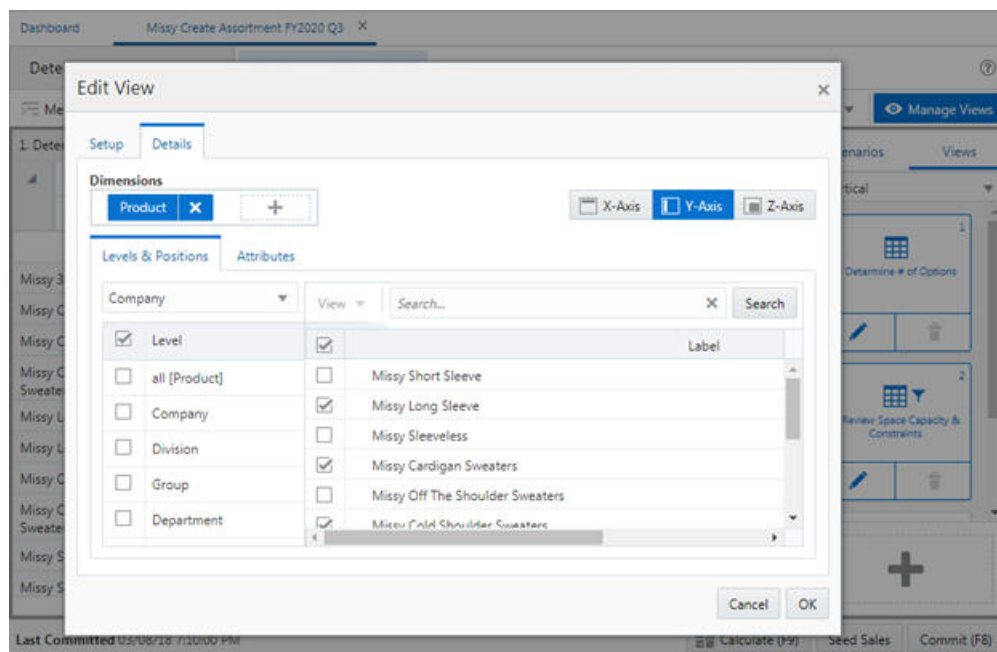
Other RPASCE functionality can affect the use of position filters.

Position Filtering and Hidden Positions

Position filtering only operates on visible measures. In addition, if the measures are hidden when the filter is applied, they will remain hidden after the filter has been applied. In order to see which measures are hidden, open Edit View for the required

dimension. The Details Tab shows which measures are visible and which are hidden, as shown in [Figure 15–14](#).

Figure 15–14 Edit View: Details Tab



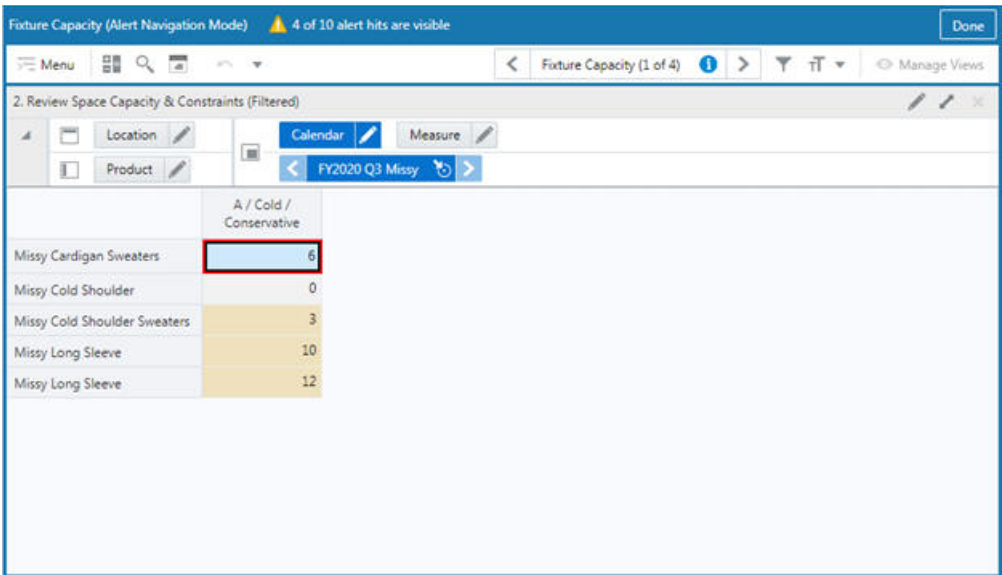
Position Filtering and Real Time Alerts Navigation

If Position Filtering is applied to a view, then Real Time Alerts Navigation will only show alerts that are currently visible in the view. Remove the position filter using the context menu Remove Filter option or the Edit View dialog box to show and hide positions.

Figure 15–15 Before Applying Position Filtering: All Alert Hits Visible

| Fixture Capacity (Alert Navigation Mode) | | | Done |
|--|-------------------------|---------|------|
| Menu | | | |
| Fixture Capacity (1 of 10) | | | |
| 2. Review Space Capacity & Constraints | | | |
| Location | Calendar | Measure | |
| Product | FY2020 Q3 Missy | | |
| | A / Cold / Conservative | | |
| Missy 3/4 Sleeve | 0 | | |
| Missy Cardigan Sweaters | 6 | | |
| Missy Cold Shoulder | 0 | | |
| Missy Cold Shoulder Sweaters | 3 | | |
| Missy Long Sleeve | 10 | | |
| Missy Long Sleeve | 12 | | |
| Missy Off The Shoulder | 2 | | |
| Missy Off The Shoulder Sweaters | 3 | | |
| Missy Short Sleeve | 3 | | |
| Missy Short Sleeve | 3 | | |

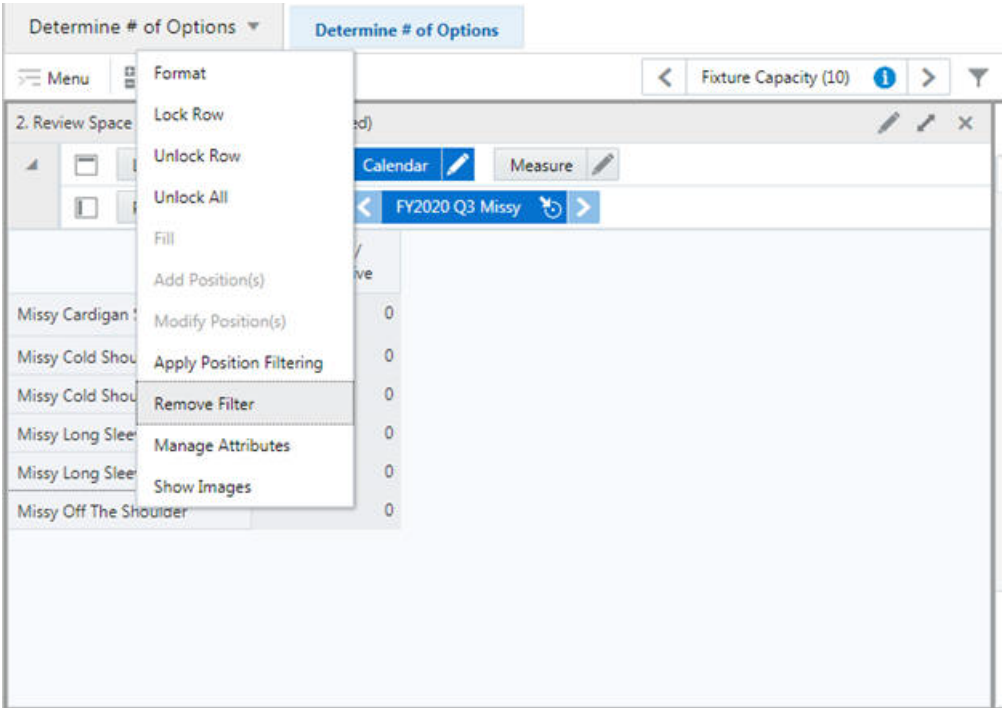
Figure 15–16 After Applying Position Filtering: Only Some Alert Hits are Visible



Removing Position Filters

Once applied, position filters can be removed using the Remove Filter option available from the right click menu, as shown in Figure 15–17. This option is not available until a position filter has been applied.

Figure 15–17 Remove Filter Option Enabled



Copying and Saving with Position Filtering

When workbooks are copied or saved with position filtering applied, the following applies:

Copying Workbooks

If a workbook view is copied, any position filters are copied as well. This means that the copied view will be identical to the original. You can remove the position filter in the copied view to show all positions.

Reopening Saved Workbooks

When the workbook is closed and reopened, it will open in the same state it was closed in. However, the applied position filter will not be present. The filtered positions are saved using Edit View Show and Hide. In addition, the Position Filter icon on the view tile and the (filtered) text appended to the view title will not be visible.

Figure 15–18 Worksheet State After Position Filter is Applied

| | A / Cold / Conservative |
|------------------------------|-------------------------|
| Missy Cold Shoulder Sweaters | 3 |
| Missy Long Sleeve | 10 |
| Missy Long Sleeve | 12 |
| Missy Off The Shoulder | 2 |

Figure 15–19 Worksheet State After Reopening the Workbook

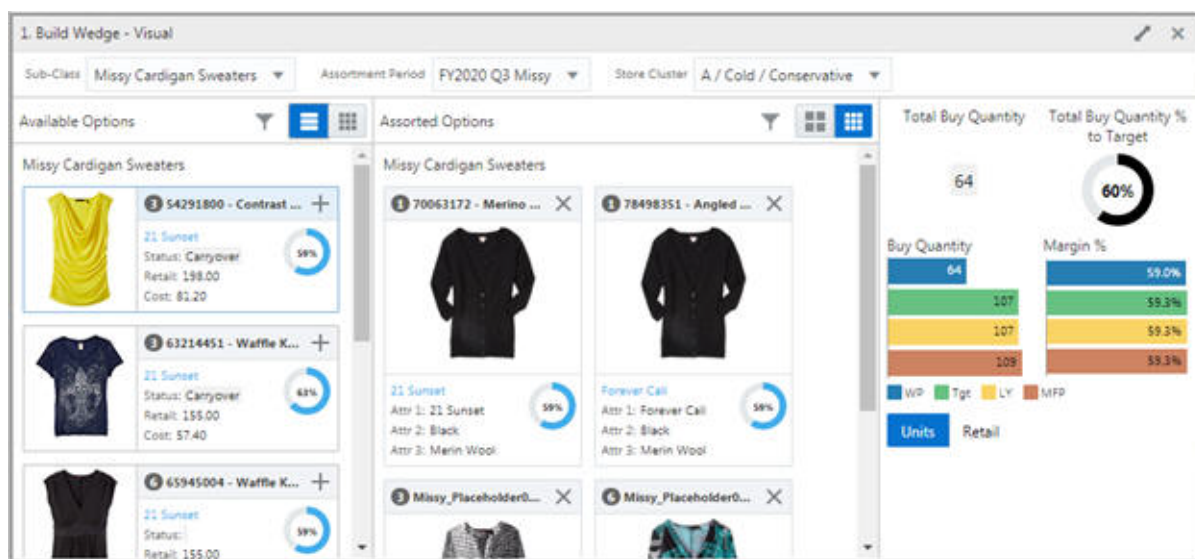
| | A / Cold / Conservative |
|------------------------------|-------------------------|
| Missy Cold Shoulder Sweaters | 3 |
| Missy Long Sleeve | 10 |
| Missy Long Sleeve | 12 |
| Missy Off The Shoulder | 2 |

Visual Planning

Visual Planning helps the planner to visualize the assortments and plan by viewing the actual assortment with images of style and colors. The ability to view images associated with dimensions, attributes, and style/colors is critical for planning. A planner can use the Visual Planning capability to create, analyze, and modify the plans as the visualization can reduce the time required for analysis.

Visual Planning is supported by the Available/Assorted Styles view. It is a specific type of view (Aggregate view layout) that supports visual planning using the Image Add and Delete functionality shown in [Figure 16-1](#).

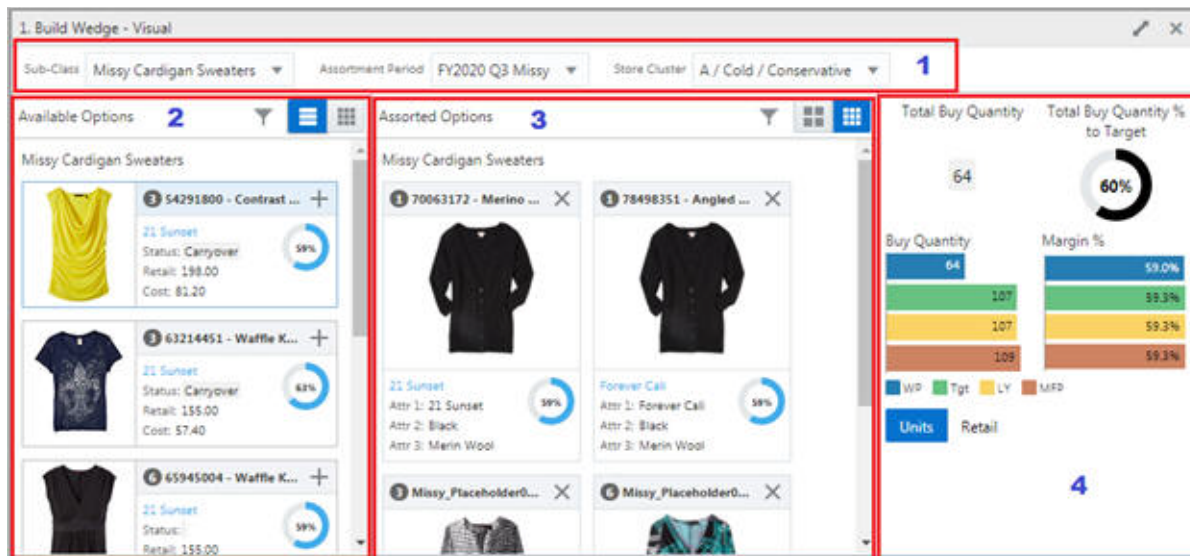
Figure 16-1 Image Add and Delete



The user can use Image Add and Delete to add and delete one or more tiles and add them from Available Options sub-view to the Assorted Options sub-view. The Available Styles and Assorted Styles views are side by side with some of the key measures configured from the application.

The Available/Assorted Styles view is an aggregated view that contains the four labeled sections shown in [Figure 16-2](#). These four sections are described in this chapter.

Figure 16–2 Aggregated View: Available/Assorted Styles View



Section 1

Section 1 contains the filters for the Product, Calendar, and Location dimension hierarchies. These can be selected by user, depending on position level security. If a parent level is selected, then all the children are selected automatically. The Positions are chosen according to the hierarchy levels involved. Visual Planning can be used at the levels defined in the view, either the lowest or any higher levels of the hierarchy, depending upon what the user selects. In [Figure 16–2](#), the Product and Location Hierarchy's lowest level of selection depends on the lowest level visible in the workbook. The Calendar Hierarchy's lowest level of selection is Assortment Period and is restricted to the assortment periods that are included within the workbook.

Section 2

Section 2 displays the Available Options sub-view. It contains all the available options represented in the form of a Card View, depending on the selection criteria. In order to modify the assortment, the senior buyer can select one or more options from Available Options, then add or delete them in Assorted Options or use the Add or Delete icons to move the options to the Available Options sub-view. The items are added to the appropriate row in Assorted Options, updating that assortment for the cluster, depending on the Option ranking. Similarly, the planner can move a style from the Assorted Options sub-view back to the Available Options view in order to remove that option from that assortment. The results are auto-saved and can be committed.

In this view, the cards are displayed in either a list or as small thumbnails, as shown in [Figure 16–3](#) and [Figure 16–4](#). The available options are displayed according to the selection criteria for dimension hierarchies, position level security, and any position query definitions that are in effect for adding or deleting into the Assorted Options sub-view. Adding or deleting a card updates the underlying measures directly, and the changes are reflected in the UI immediately.

Figure 16-3 Available Options Sub-View Small Thumbnail

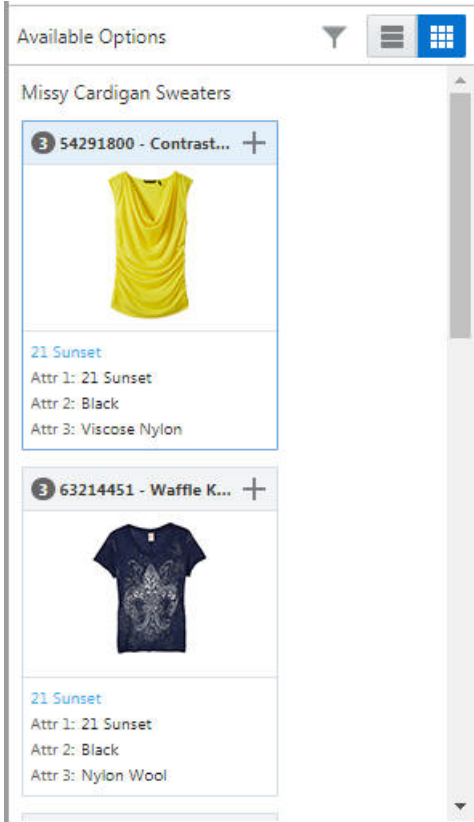
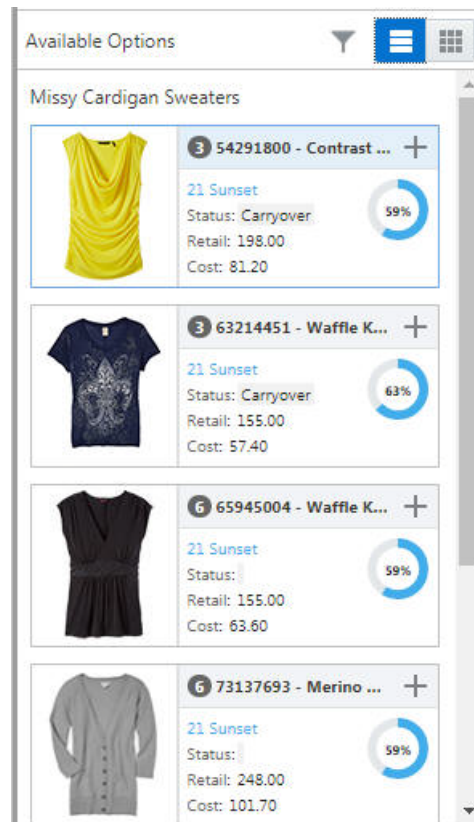


Figure 16–4 Available Options Sub-View List View



Section 3

Section 3 displays the Assorted Options sub-view. It contains all the options those are included in the assortment represented in the form of the Card View, depending on the selection criteria. In order to modify the assortment, the Planner can either add one or more options from Available Options or delete (X icon next to the card) one or more options from Assorted Options. The options are added or removed to or from the Assorted Options, updating that assortment for cluster. Similarly, the planner can add and delete a style from Available Options view back to the Assorted Options view in order to add that option to the assortment. The results are auto saved and can be committed.

In this view, the cards are displayed as small or large thumbnails, as shown in [Figure 16–5](#) and [Figure 16–6](#). If there are more tiles in a row than can fit on a single line, the extra tiles are wrapped onto lines below. The Assorted Options are displayed according to the selection criteria for dimension hierarchies, position level security, and any position query definitions that are in effect and for adding or deleting into the Available Options sub-view. Adding or deleting a card updates the underlying measures directly, and the changes are reflected in the UI immediately.

Figure 16–5 Assorted Options Sub-View Large Thumbnails

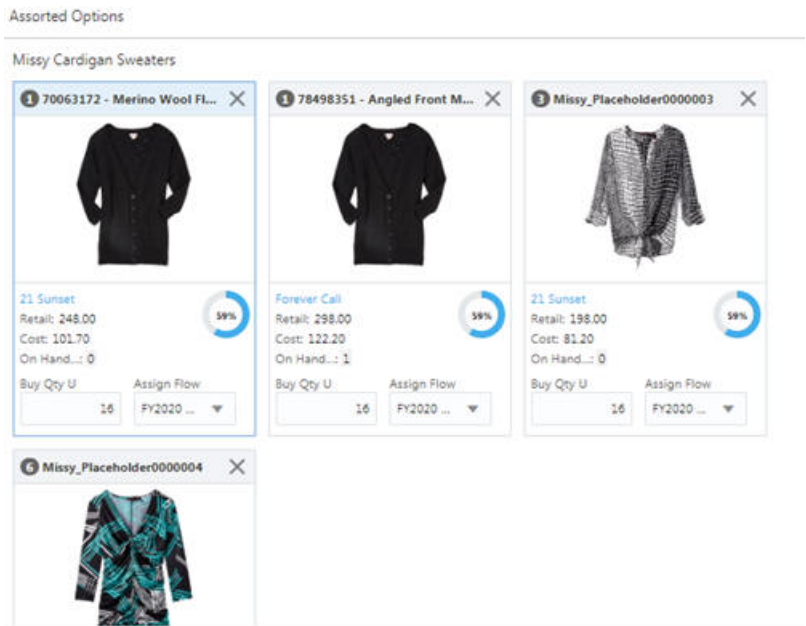
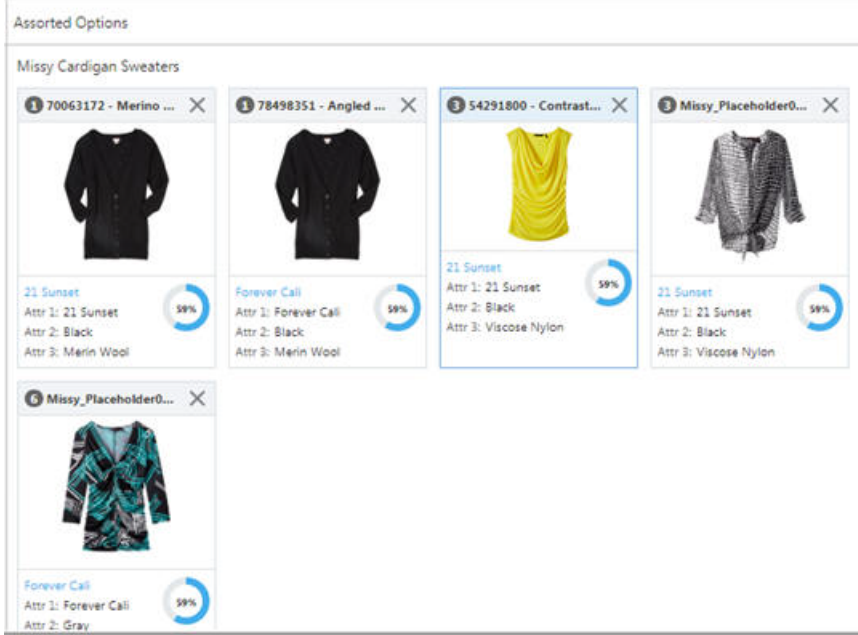


Figure 16–6 Assorted Options Sub-View Small Thumbnails



Once the user adds the card to the Available Options sub-view, the card is deleted from the Assorted Options sub-view and is displayed in the Available Options sub-view and vice versa.

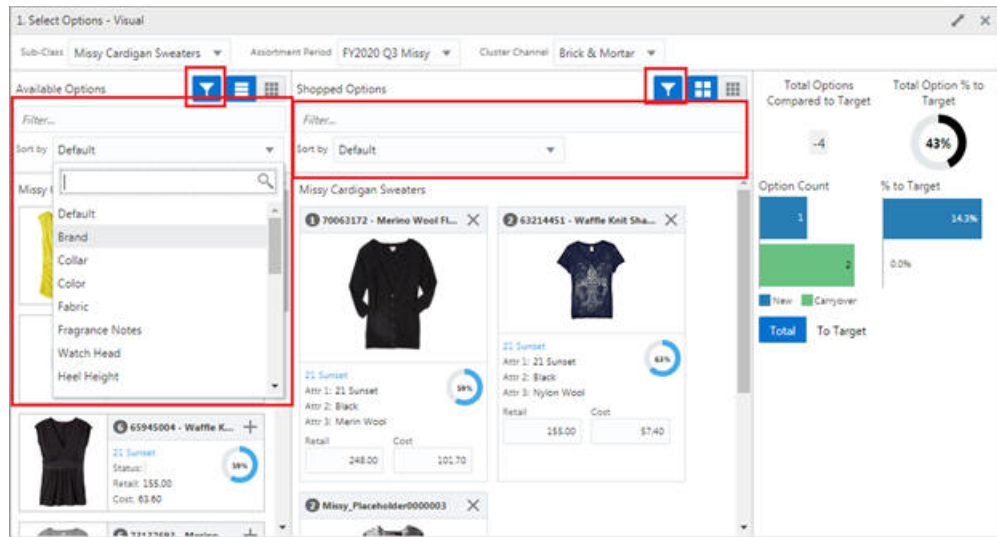
Section 4

Section 4 displays the Total Summary sub-view. This sub-view is dependent on the Assorted Options sub-view. It provides an overall summary of the assorted options with respect to budgets, target receipts, target margins, and so on. Whenever changes are made to the Assorted Options sub-view, the Total Summary is recalculated to

display new results. The measures cannot be altered and are non-configurable. The measures can be viewed either in units or retail value, depending on the user selection. The Total Summary sub-view can be used to quickly highlight the target budget, receipts, and margin between the current assortment, target, and last year.

You can filter the tiles by clicking on the Filter icon and then entering the text in the Filter text box. You can sort the tiles based on attributes by selecting the desired attribute from Sort by picklist. This can help the planner to select and validate the assortment options based on attributes.

Figure 16–7 Enable Filter Option: Filter and Sort Tiles



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

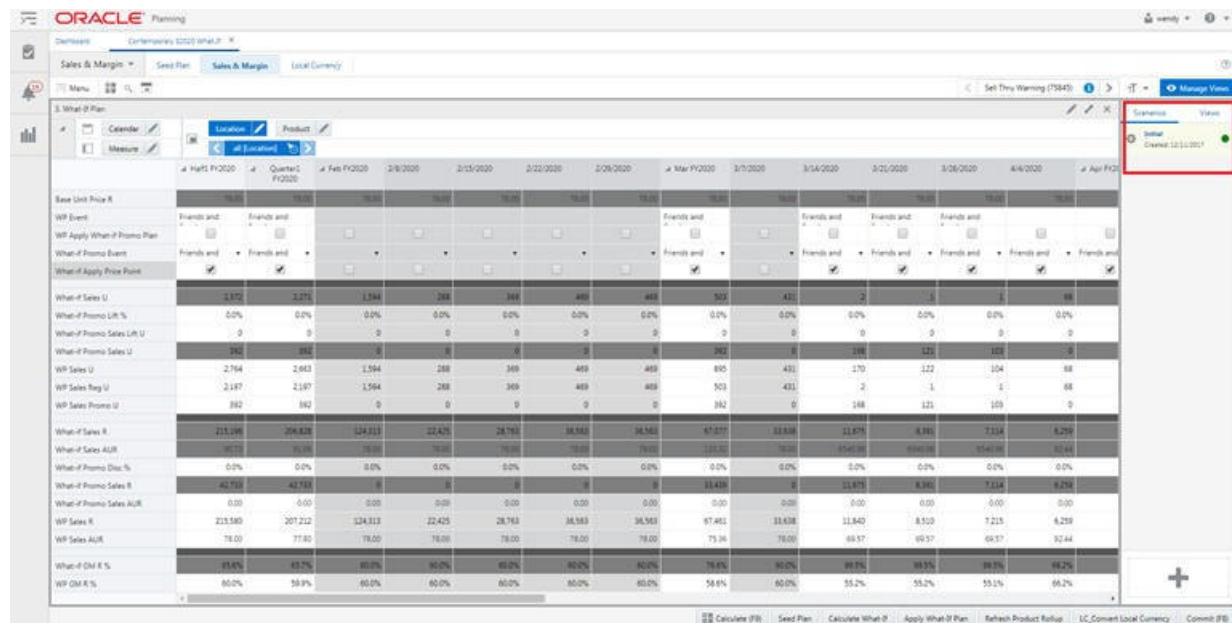
As a planner, you make a number of decisions that affect your plans. These decisions can be complex and you may spend a significant amount of time developing a potential plan before you know if it is optimal or not. Since the workspace contains a single version of the plan, you cannot compare different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

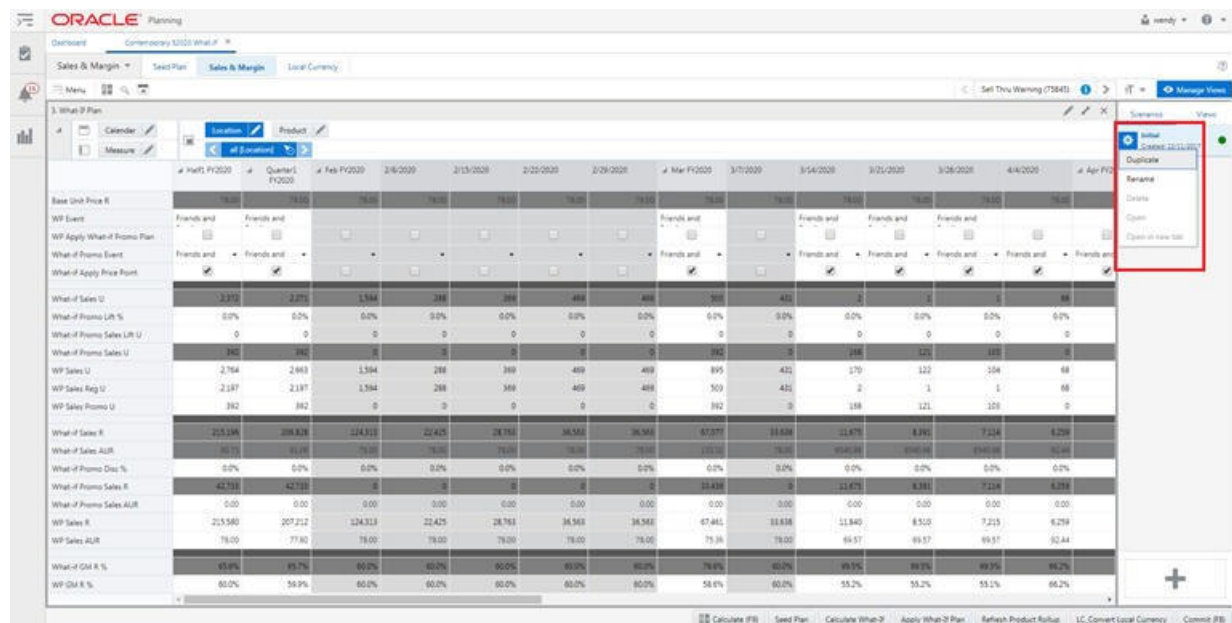
Figure 17-1 illustrates the main scenario and the green icon that identifies it.

Figure 17–1 Master Scenario

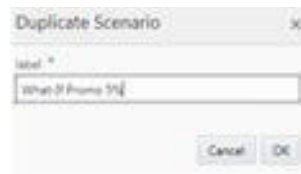


You cannot delete the master scenario. Since it is already open, the Open and Open in new tab options are also disabled. You can either duplicate the scenario to create another scenario or rename the scenario.

Figure 17–2 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 17-3 Name Duplicate Scenario

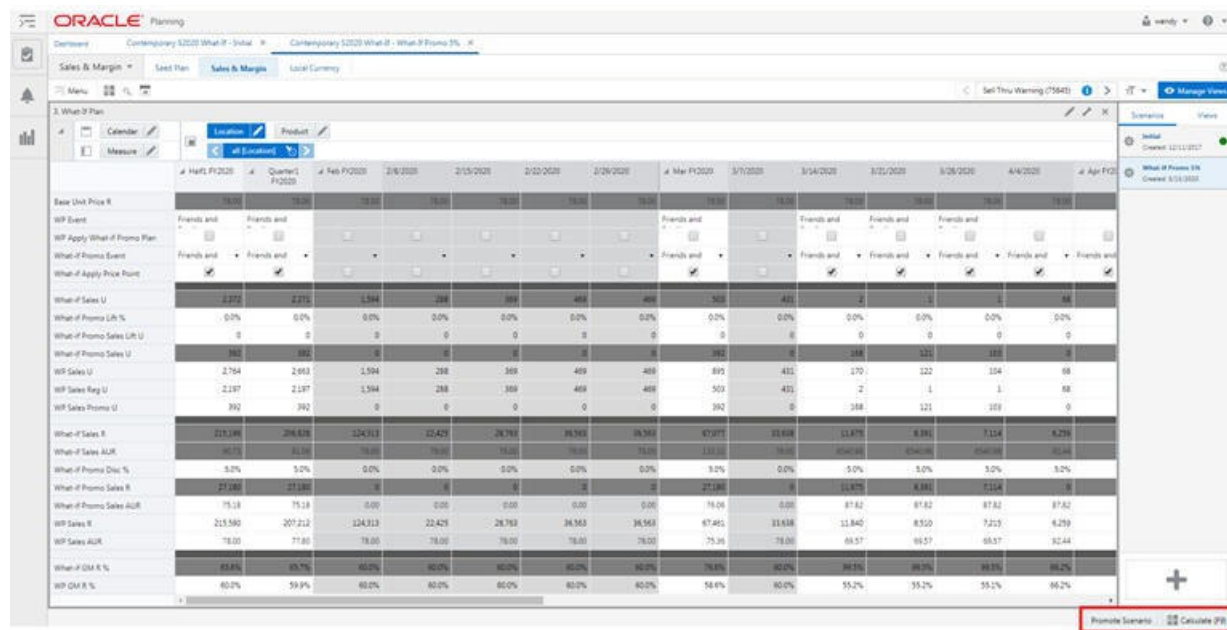
The new scenario is created and you can clearly differentiate the master scenario as follows.

Figure 17-4 Master Scenario Identification

| | Jan FY2020 | Quarter 1 FY2020 | Feb FY2020 | 3/8/2020 | 3/15/2020 | 3/22/2020 | 3/29/2020 | Mar FY2020 | 3/7/2020 | 3/14/2020 | 3/21/2020 | 3/28/2020 | 4/4/2020 | Apr FY2020 |
|-----------------------------|-------------|------------------|------------|----------|-----------|-----------|-----------|-------------|----------|-----------|-------------|-------------|-------------|-------------|
| Base Unit Price R | 75.00 | 75.00 | 75.00 | 75.00 | 75.00 | 75.00 | 75.00 | 75.00 | 75.00 | 75.00 | 75.00 | 75.00 | 75.00 | 75.00 |
| WP Event | Friends and | Friends and | | | | | | Friends and | | | Friends and | Friends and | Friends and | Friends and |
| WP Apply When-If Promo Plan | | | | | | | | | | | | | | |
| When-If Promo Event | Friends and | Friends and | | | | | | Friends and | | | Friends and | Friends and | Friends and | Friends and |
| When-If Apply Price Point | | | | | | | | | | | | | | |
| When-If Sales U | 2,372 | 2,271 | 1,544 | 288 | 369 | 469 | 463 | 503 | 431 | 2 | 1 | 1 | 1 | 88 |
| When-If Promo Lift % | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| When-If Promo Sales Lift U | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| When-If Promo Sales U | 392 | 392 | 0 | 0 | 0 | 0 | 0 | 392 | 0 | 0 | 398 | 123 | 103 | 0 |
| WP Sales U | 2,764 | 2,663 | 1,544 | 288 | 369 | 469 | 463 | 895 | 431 | 170 | 122 | 104 | 104 | 88 |
| WP Sales Reg U | 2,187 | 2,187 | 1,544 | 288 | 369 | 469 | 463 | 503 | 431 | 2 | 1 | 1 | 1 | 68 |
| WP Sales Promo U | 392 | 392 | 0 | 0 | 0 | 0 | 0 | 392 | 0 | 0 | 398 | 123 | 103 | 0 |
| When-If Sales R | 215,498 | 206,828 | 124,313 | 22,425 | 28,763 | 36,563 | 36,563 | 67,483 | 13,638 | 11,840 | 6,890 | 7,123 | 6,259 | 6,259 |
| When-If Sales ALR | 95.72 | 95.98 | 76.00 | 76.00 | 76.00 | 76.00 | 76.00 | 100.00 | 76.00 | 0.0438 | 0.0438 | 0.0438 | 0.0438 | 0.0438 |
| When-If Promo Disc % | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| When-If Promo Sales R | 42,733 | 42,733 | 0 | 0 | 0 | 0 | 0 | 42,733 | 0 | 11,875 | 6,890 | 7,123 | 6,259 | 6,259 |
| When-If Promo Sales ALR | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| WP Sales R | 215,580 | 207,212 | 124,313 | 22,425 | 28,763 | 36,563 | 36,563 | 67,483 | 13,638 | 11,840 | 8,510 | 7,215 | 6,259 | 6,259 |
| WP Sales ALR | 76.00 | 77.80 | 76.00 | 76.00 | 76.00 | 76.00 | 76.00 | 75.38 | 76.00 | 69.57 | 69.57 | 69.57 | 69.57 | 69.57 |
| When-If Out R % | 81.8% | 81.7% | 80.0% | 80.0% | 80.0% | 80.0% | 80.0% | 76.6% | 80.0% | 89.5% | 89.5% | 89.5% | 89.5% | 89.2% |
| WP Out R % | 80.0% | 79.9% | 80.0% | 80.0% | 80.0% | 80.0% | 80.0% | 58.6% | 60.0% | 55.2% | 55.2% | 55.1% | 55.2% | 55.2% |

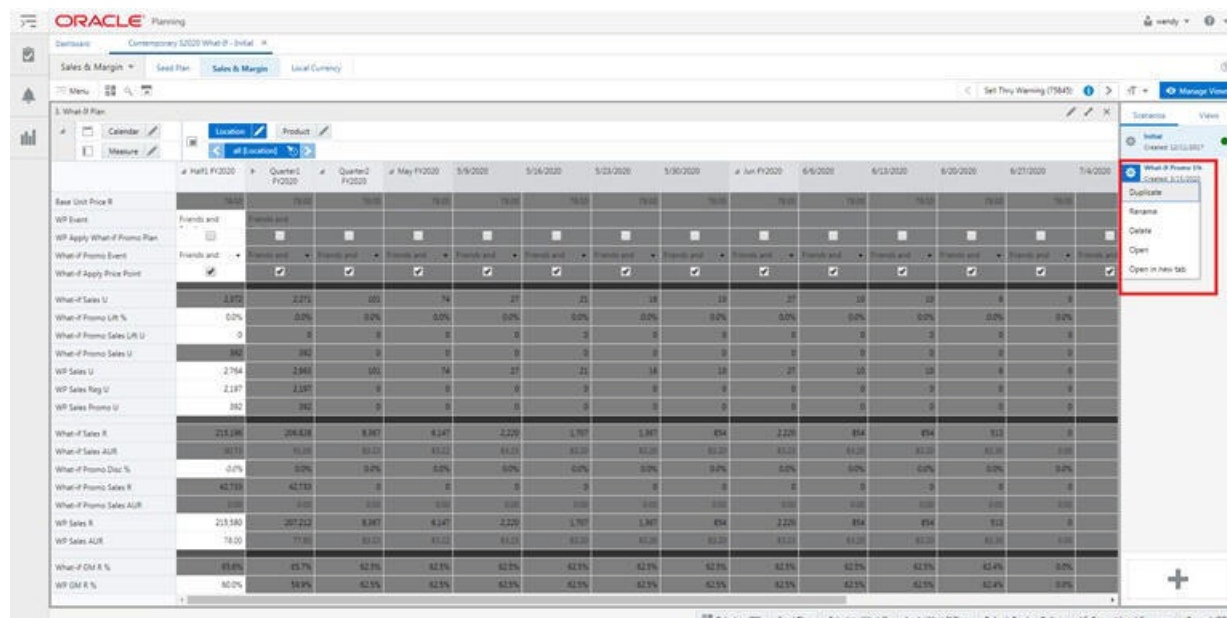
Unlike the master scenario, the what-if scenarios cannot commit the data to the domain, as these scenarios are working copies. No action items are visible, except to promote the scenario to master scenario.

Figure 17–5 What-If Scenario



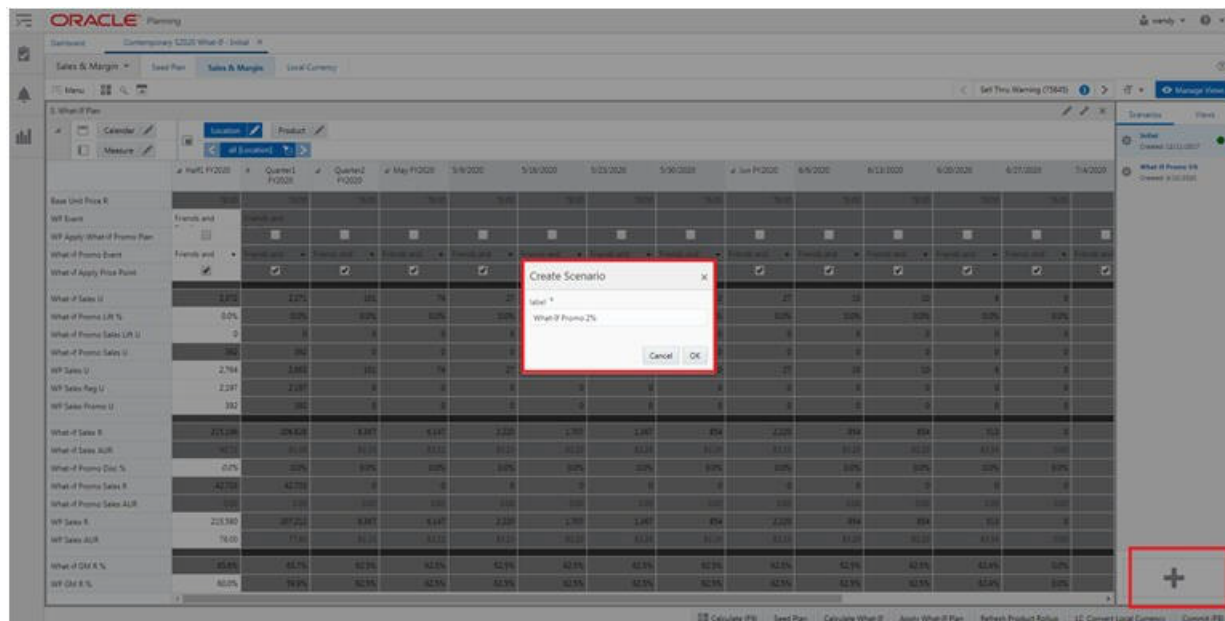
The actions Duplicate (to duplicate the scenario and create new one), Rename (to change the label of the scenario), Delete (to delete the scenario), Open (to open the scenario in the current browser window), and Open in new tab (to open the scenario in new browser tab window) are shown in Figure 17–6.

Figure 17–6 Actions Performed on a Scenario



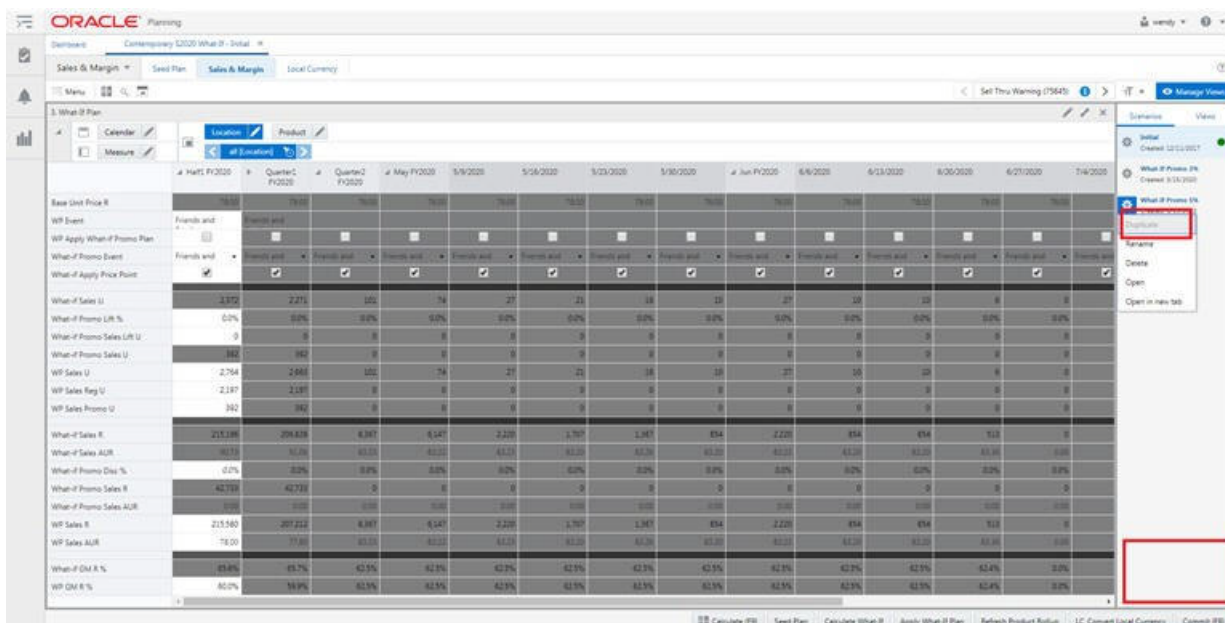
You can also create the scenario by using the + icon in the Scenarios section.

Figure 17-7 Create Scenario

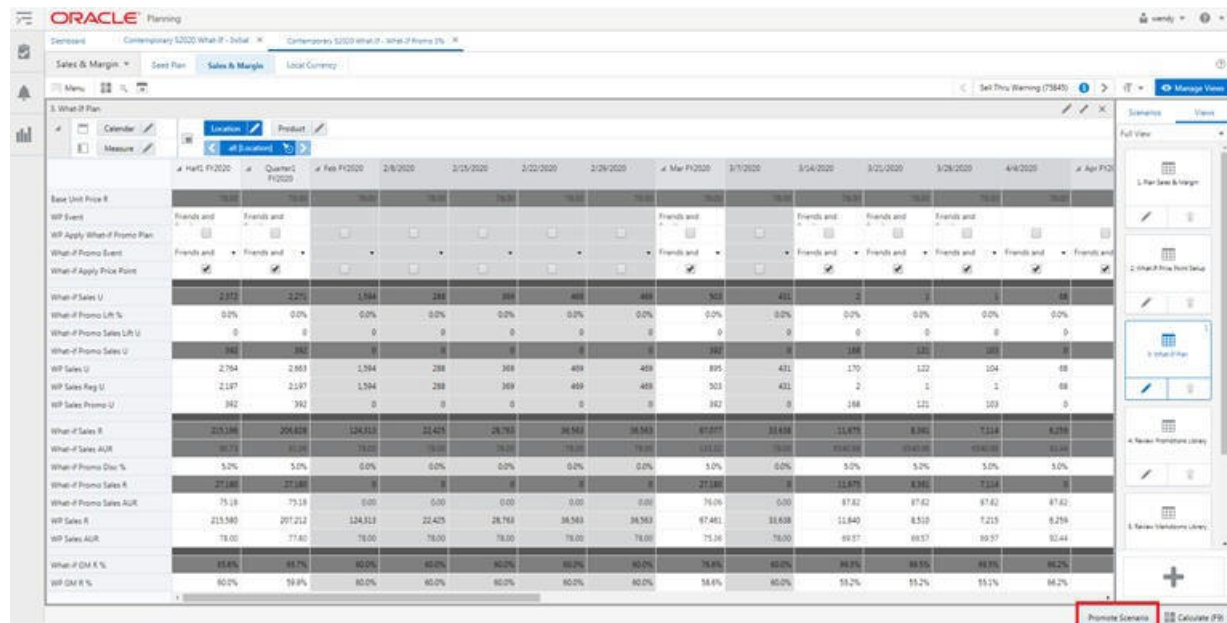


A maximum of three scenarios is allowed, including the master scenario. Once you have created three scenarios and the master scenario, the + icon, Duplicate, and the scenario actions are disabled and you cannot create more scenarios.

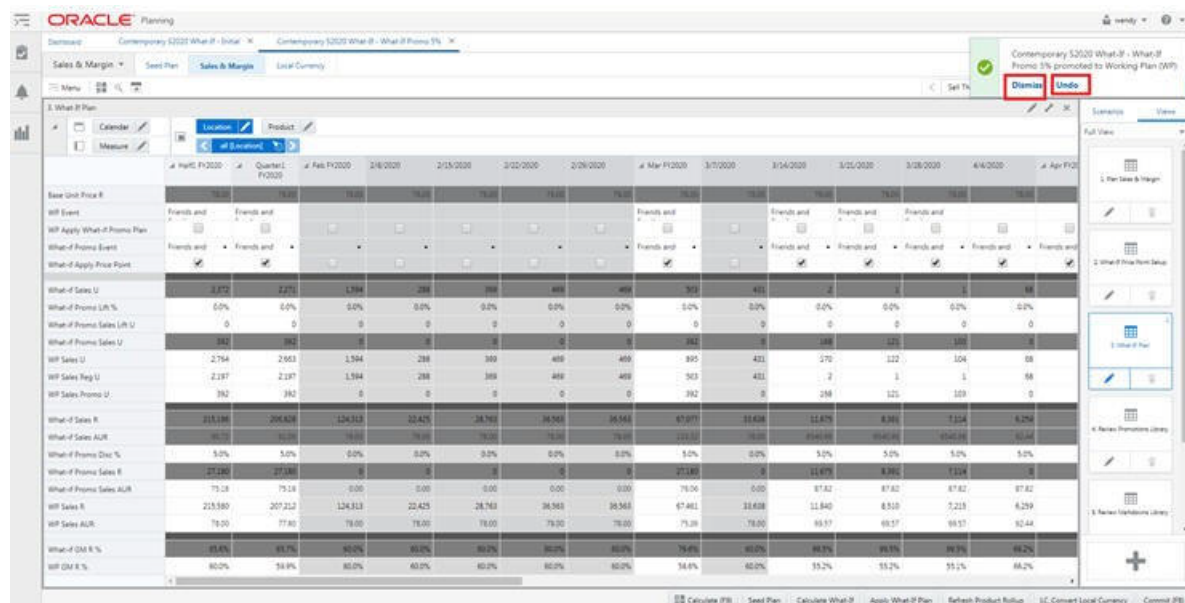
Figure 17-8 Maximum Number of Scenarios



You can delete the scenario in order to create a new scenario. You can promote the scenario to master scenario. In Figure 17-9, the what-if promo 5% scenario is promoted to the master scenario by clicking **Promote Scenario**.

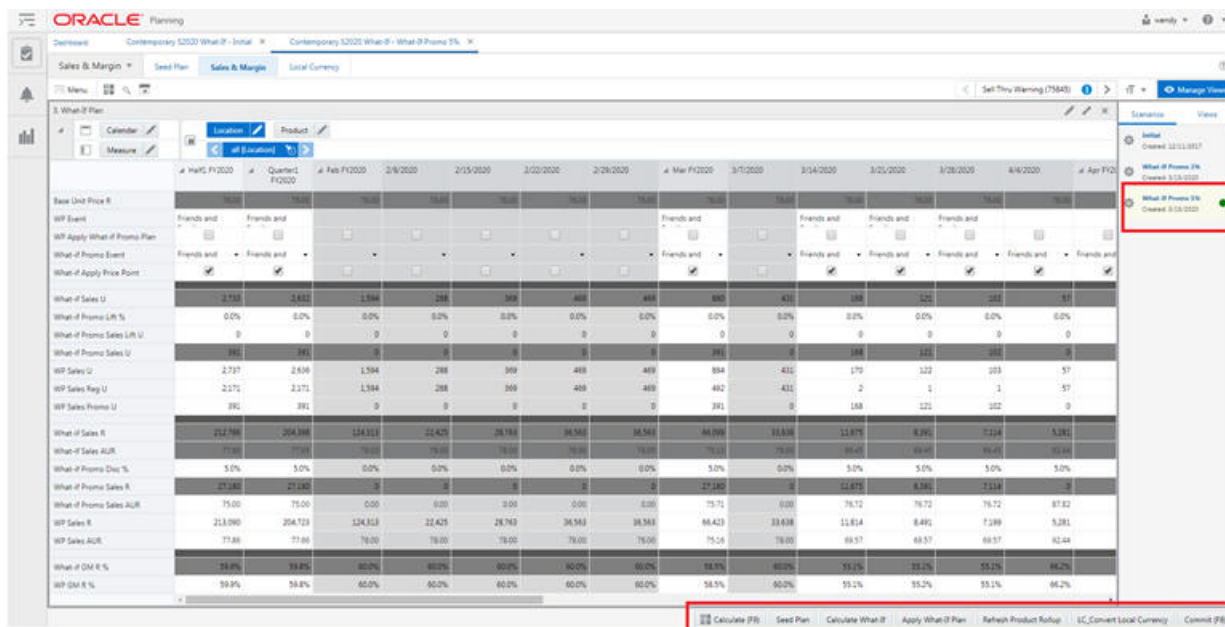
Figure 17–9 Promote Scenario

After you click Promote Scenario, a toast notification is displayed, as shown [Figure 17–10](#). 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 17–10 Toast Notification During Promote Scenario

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

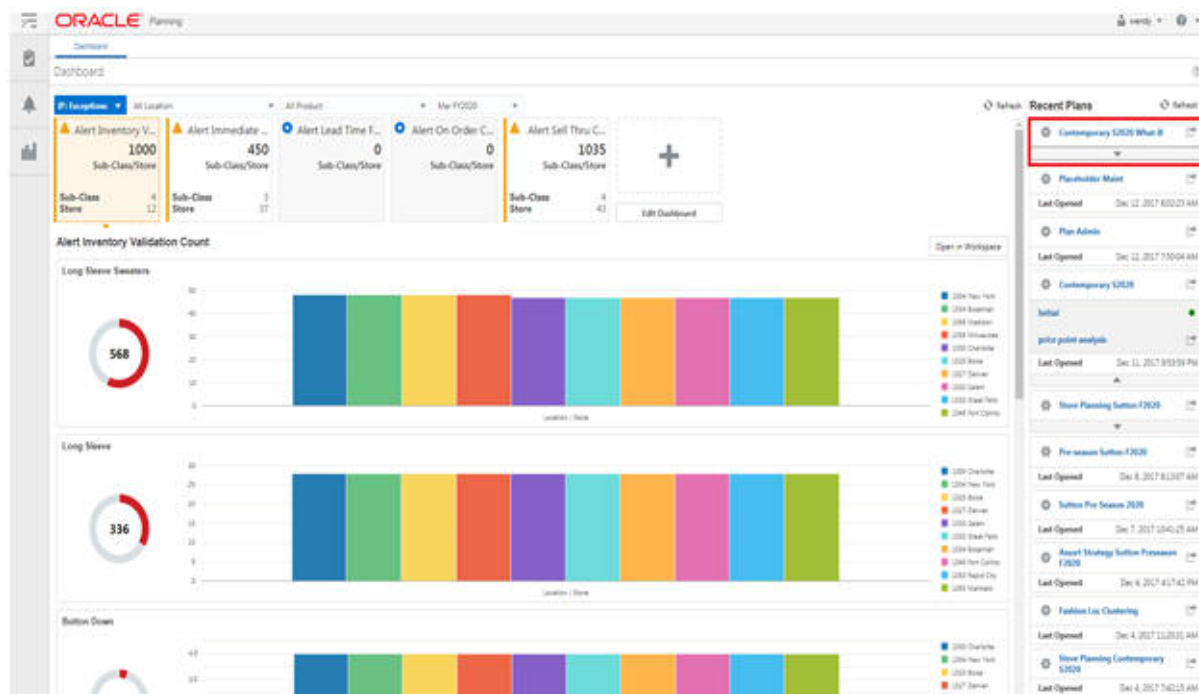
Figure 17–11 Promote Scenario to Master Scenario



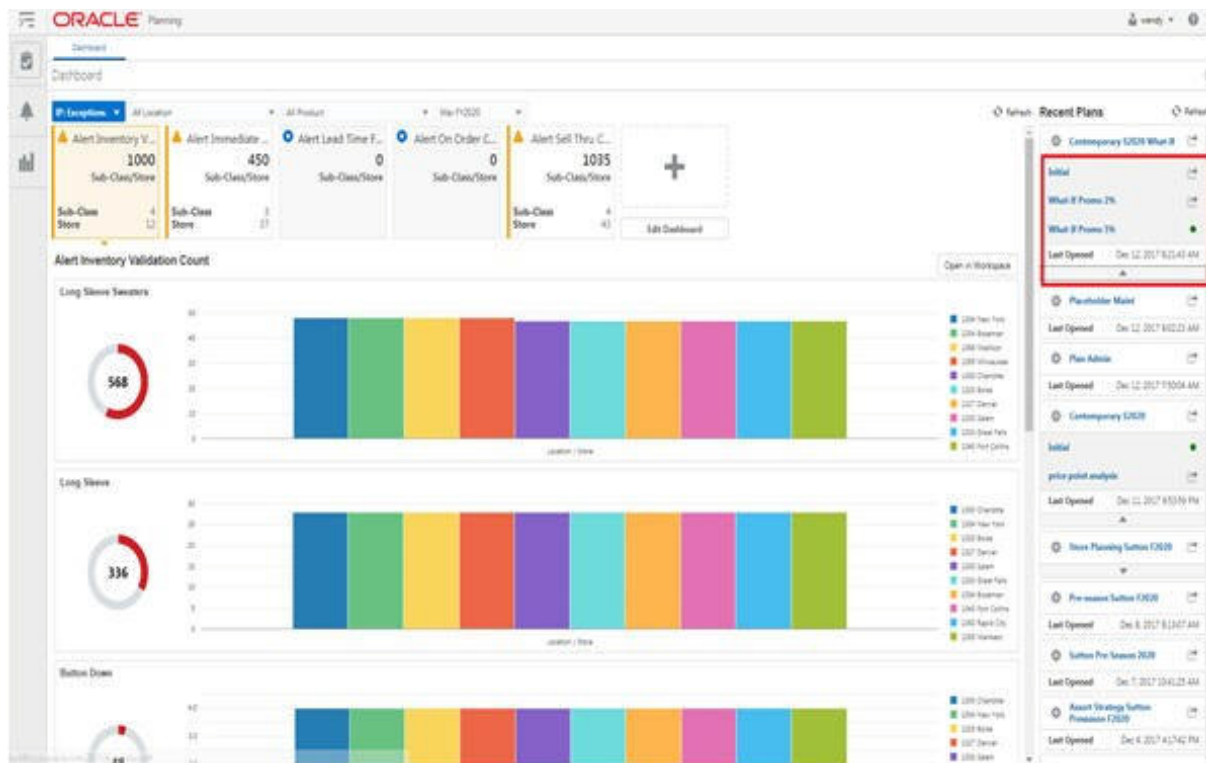
Viewing All Scenarios from the Dashboard

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

Figure 17–12 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 17–13 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 17-14 Image Display

| 1. Plan Receipts & Inventory | | | | |
|--|---|---------------------------------------|----------|-----------|
| <div> <div>Calendar</div> <div>Product</div> </div> | | <div>Location</div> <div>WP WOS</div> | Measure | |
| | | 8/1/2020 | 8/8/2020 | 8/15/2020 |
| 54291800 - Contrast Elbow Patch Cardigan - Black |  | 0.00 | 21.66 | 20.66 |
| 56453938 - Cold Shoulder Zip Sweater - Moss |  | 0.00 | 4.58 | 3.58 |
| 56659560 - Cold Shoulder Zip Sweater - Black |  | 0.00 | 3.18 | 2.18 |
| 63214451 - Waffle Knit Shawl Collar Cardigan - Black |  | 0.00 | 9.16 | 8.16 |

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.

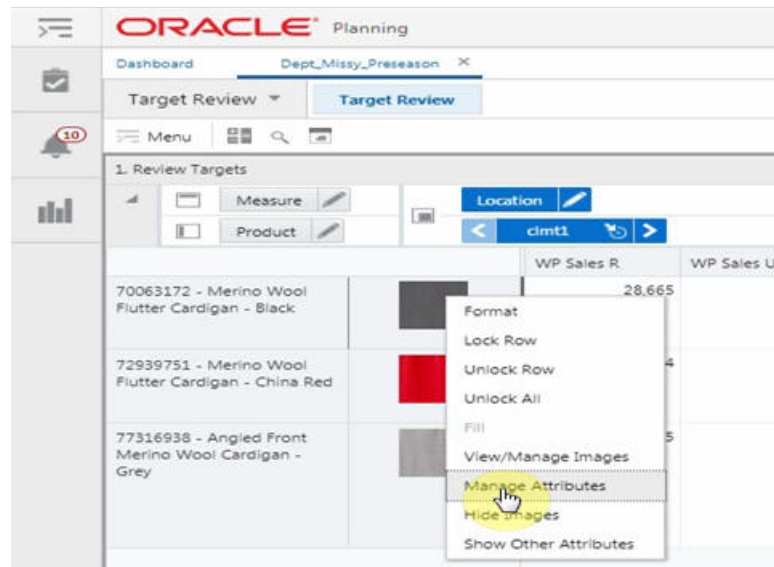
Figure 17-15 Image Cell Actions

| 1. Plan Receipts & Inventory | | | | |
|--|---|---------------------------------------|----------|-----------|
| <div> <div>Calendar</div> <div>Product</div> </div> | | <div>Location</div> <div>WP WOS</div> | Measure | |
| | | 8/1/2020 | 8/8/2020 | 8/15/2020 |
| 54291800 - Contrast Elbow Patch Cardigan - Black |  | 0.00 | 21.66 | 20.66 |
| 56453938 - Cold Shoulder Zip Sweater - Moss |  | | 4.58 | 3.58 |
| 56659560 - Cold Shoulder Zip Sweater - Black |  | | 3.18 | 2.18 |
| 63214451 - Waffle Knit Shawl Collar Cardigan - Black |  | | 9.16 | 8.16 |
| 65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather |  | | 0.00 | 0.00 |

Manage Attributes

Click **Manage Attributes** to open the Edit View Details tab with the Attributes tab. You can choose to view and sort attributes in the view. You can also select the attribute images for selection.

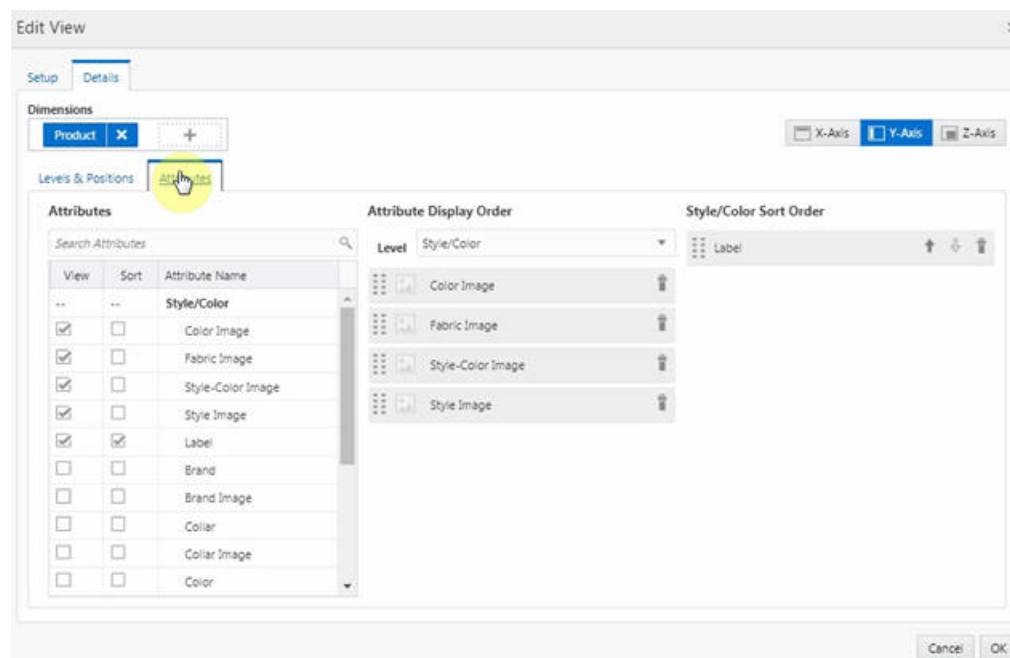
Figure 17-16 Manage Attributes



To sort or view attributes, complete the following steps:

1. Select or unselect the boxes to the left of the attribute name positions to viewing and sort availability of particular attributes.

Figure 17-17 Select Attributes for Viewing and Sorting Positions

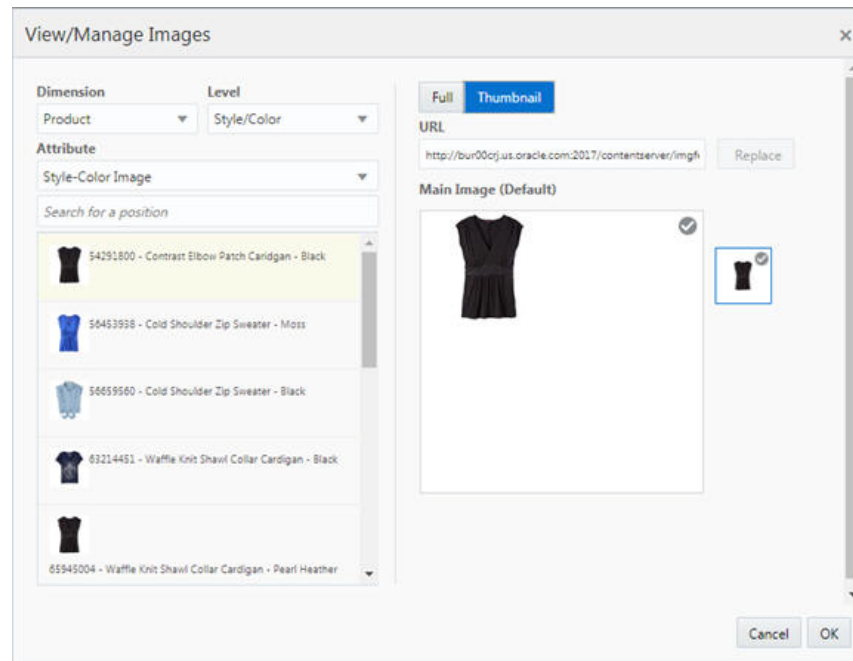


2. You can change the attribute display order by dragging and dropping the attributes or delete them from display order by clicking on the delete icon. You can also use the level selection to view the attributes at particular hierarchy level.
3. You can change the selected level sort order by changing the ascending and descending order arrows or delete them from sort order by clicking on the delete icon.

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.

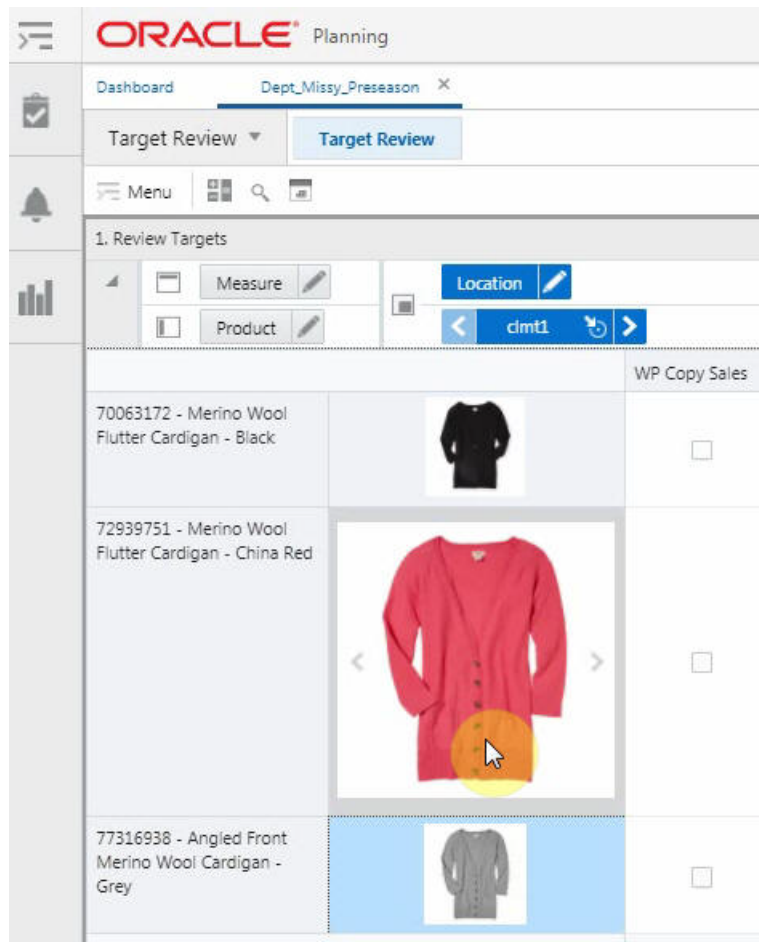
Figure 17–18 View and Manage Images



Resize Images

Note: The width of row header layer and the height of column header layer cannot be resized beyond a particular point.

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 17–19 *Resize Image*

Note: The width of row header layer and the height of column header layer cannot be resized beyond a particular point.

Show or Hide Images

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

Figure 17-20 Hide Images

1. Plan Receipts & Inventory

Calendar Location Measure

Product WP WOS

| | 8/1/2020 | 8/8/2020 | 8/15/2020 | 8/22/2020 |
|--|----------|----------|-----------|-----------|
| 54291800 - Contrast Elbow Patch Cardigan - Black | 0.00 | 21.66 | 20.66 | |
| 56453938 - Cold Shoulder Zip Sweater - Moss | | 4.58 | 3.58 | |
| 56659560 - Cold Shoulder Zip Sweater - Black | | 3.18 | 2.18 | |
| 63214451 - Waffle Knit Shawl Collar Cardigan - Black | | 9.16 | 8.16 | |
| 65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather | 0.00 | 0.00 | | |

Format

Lock Row

Unlock Row

Unlock All

Fill

View/Manage Images

Manage Attributes

Hide Images

Show Other Attributes

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

Figure 17-21 Show Images

1. Plan Receipts & Inventory

Calendar Location Measure

Product WP WOS

| | 8/1/2020 | 8/8/2020 | 8/15/2020 | 8/22/2020 |
|--|----------|----------|-----------|-----------|
| 54291800 - Contrast Elbow Patch Cardigan - Black | 0.00 | 21.66 | 20.66 | |
| 56453938 - Cold Shoulder Zip Sweater - Moss | | 4.58 | 3.58 | |
| 56659560 - Cold Shoulder Zip Sweater - Black | | 3.18 | 2.18 | |
| 63214451 - Waffle Knit Shawl Collar Cardigan - Black | | 9.16 | 8.16 | |
| 65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather | 0.00 | 0.00 | | |

Format

Lock Row

Unlock Row

Unlock All

Fill





Manage Attributes

Show Images

Show Other Attributes

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

Figure 17–22 Image Display with Axis Pivot

| 1. Plan Receipts & Inventory | | | | |
|------------------------------|---|---|--|---|
| | Product | Location | Measure | |
| | Calendar | Cold / A / B | | |
| | 54291800 - Contrast Elbow Patch Cardigan - Black | 56453938 - Cold Shoulder Zip Sweater - Moss | 56659560 - Cold Shoulder Zip Sweater - Black | 63214451 - Waffle Knit Shawl Collar Cardigan - Black |
| |  |  |  |  |
| 8/1/2020 | 0.00 | 0.00 | 0.00 | 0.00 |
| 8/8/2020 | 21.66 | 4.58 | 3.18 | 9.16 |
| 8/15/2020 | 20.66 | 3.58 | 2.18 | 8.16 |
| 8/22/2020 | 19.66 | 2.58 | 1.18 | 7.16 |
| 8/29/2020 | 18.66 | 1.58 | 0.18 | 6.16 |
| 9/5/2020 | 17.66 | 0.58 | 0.00 | 5.16 |
| 9/12/2020 | 16.66 | 0.00 | 0.00 | 4.16 |

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 17–23 No Image Icon**Figure 17–24 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 17–25 Extended Measure

The screenshot shows the Oracle Planning application interface. The main window displays a data table with columns for dates from 4/1/15 to 4/1/20 and rows for various measures. A red box highlights the row 'Wip Sales R controls Prod %'. The table includes measures like 'Wip Sales R', 'Wip Sales R controls Prod %', 'Wip Sales R controls Time %', 'Wip Returns R', 'Wip Returns R controls Time %', 'Wip Inventory R', 'Wip Inventory R controls Time %', and 'Wip Inventory R controls %'. The values are numerical, representing percentages or ratios.

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.
- 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.

Troubleshooting

This appendix provides details that you can use to identify and resolve problems.

Accessing Multiple RPASCE Applications

A user may need to access multiple RPASCE applications, such as MFP and A&IP, at the same time. In this case it is necessary to launch each application URL in a separate browser window, in the following way.

Launch one application in a browser window, then launch every other application in an incognito window (Chrome) or in a private window (Firefox). Launching multiple applications using regular browser windows of the same type (for example, Chrome/Firefox) can lead to unexpected UI errors, such as logging out of one application causing a logout across all applications.

