

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

User Guide

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A Troubleshooting

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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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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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- Detailed step-by-step instructions to re-create
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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.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Getting Started

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

Overview

RPAS CE is a configurable cloud-engineered platform with a proven scalability for developing multidimensional forecasting and planning-based solutions with an enhanced user experience. The RPAS CE 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 RPAS CE Client includes an Activity Task Flow feature that provides a robust workflow that makes each planning activity easier to track and maintain.

Essential Concepts

RPAS CE 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 RPAS CE.

Multidimensionality

In RPAS CE, 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 RPAS CE 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 RPAS CE. They reflect the dimensions set up at your business and used by the merchandising solutions.

RPAS CE 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.

Domains and Workspaces

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

When you use an RPAS CE 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 RPAS CE 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. As part of creating a segment, you select which portions of the data will be available within that segment. Data that is not selected for the segment will not be available within it and must be accessed through other segments.

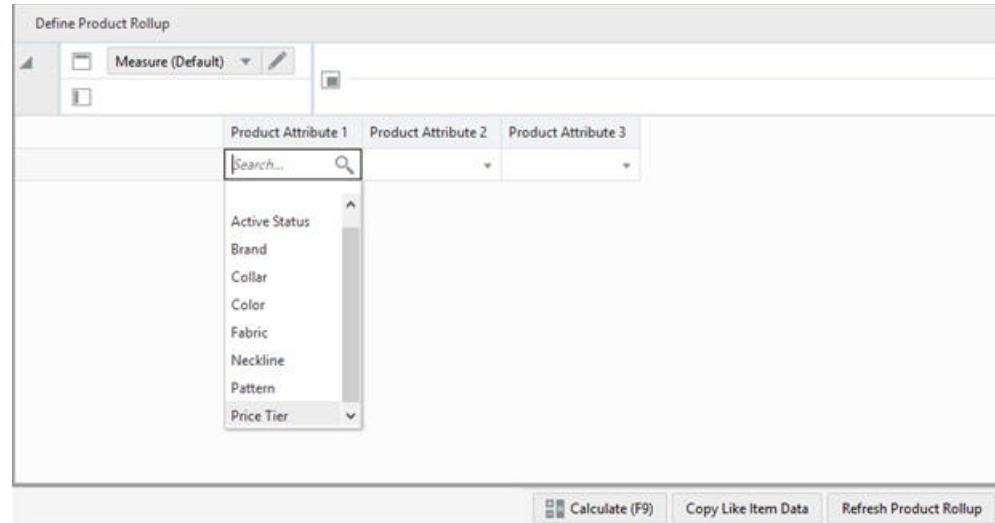
Dashboard

The RPAS CE dashboard contains a set of tiles that display summary Key Performance Indicator (KPI) information. The information provided helps you identify areas of your business that require your 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 dashboard 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. You can create new placeholder positions and dynamically role them up within the same workspace.

Figure 1–1 *Dynamic Hierarchy*



Setting Up Your Browser

The RPAS CE Client can be accessed using [Google Chrome](#), [Mozilla Firefox](#), or [Microsoft Edge](#). Before you access the application for the first time, you must set the following browser settings to allow seamless and error-free access.

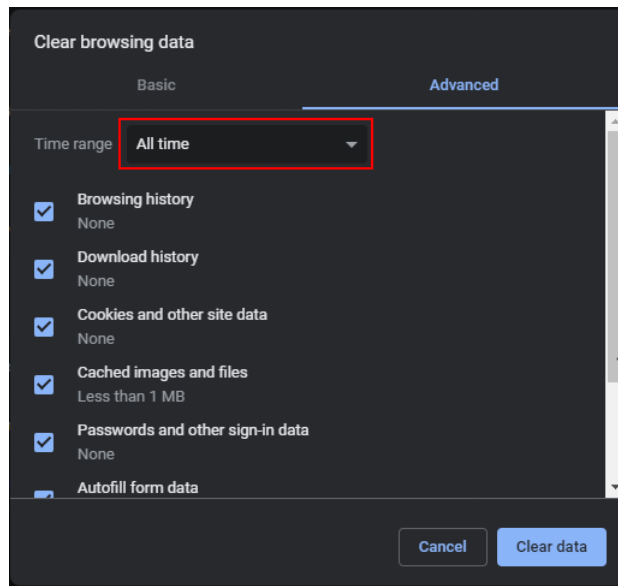
- [Cache Settings](#)
- [Security Settings](#)

Cache Settings

The RPAS CE 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.

Google Chrome

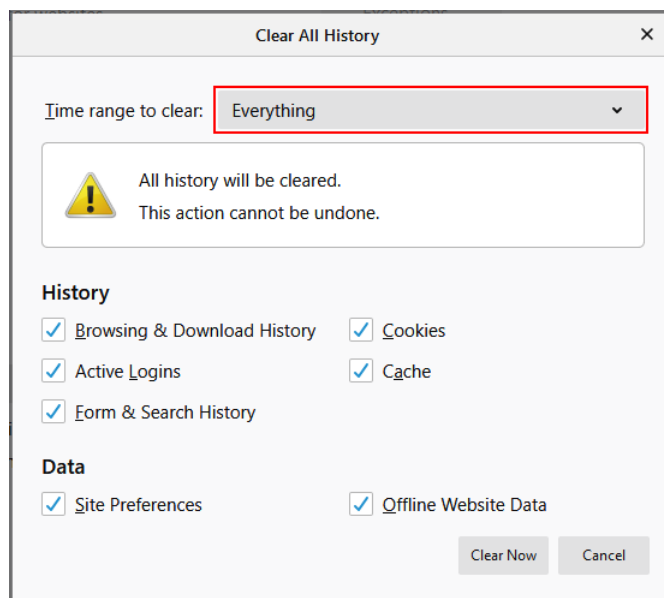
1. Click the Chrome button (located in the upper-right corner of your browser).
2. Click **Settings** and then click **Show Advanced Settings**.
3. Scroll down further and click **Clear Browsing Data** under **Privacy**.
4. In the Clear Browsing Data window, select **All time** for the Time Range.
5. Check the boxes that you want to clear and click **Clear data**.

Figure 1–2 Chrome Clear Browser Cache

Mozilla Firefox

In Firefox, to clear browsing history, complete the following steps:

1. From the menu toolbar, select **Tools** and then select **Options**.
2. Select **Privacy & Security**.
3. Under History, click **Clear History**.
4. In the Clear Recent History pop-up, select **Everything** from the **Time range to clear** list.
5. Check the boxes that you want to clear and click **OK**.

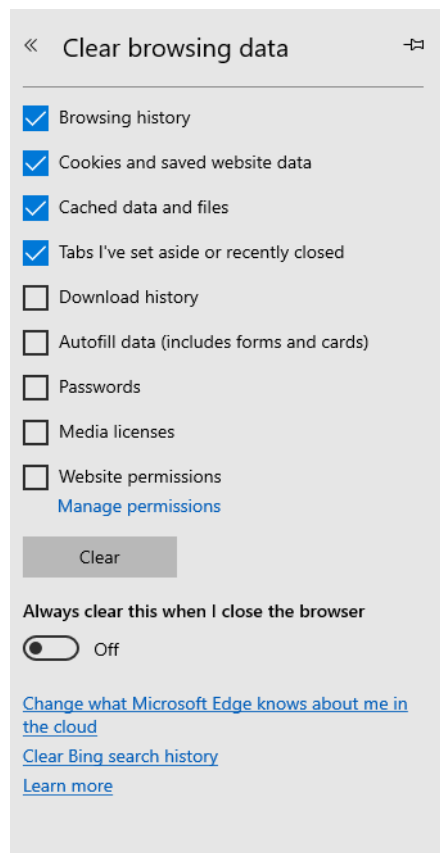
Figure 1–3 Firefox Clear All History

Microsoft Edge

In Edge, to clear browsing history, complete the following steps:

1. Select **Settings and more** (a small button with three dots located in the upper-right corner of your browser)).
2. Select **Settings** and then **Privacy & security**.
3. Under Browsing Data, click **Choose what to clear**.
4. Under Clear browsing data, check the boxes that you want to clear and click **Clear**.

Figure 1–4 Edge Clear Browsing Data

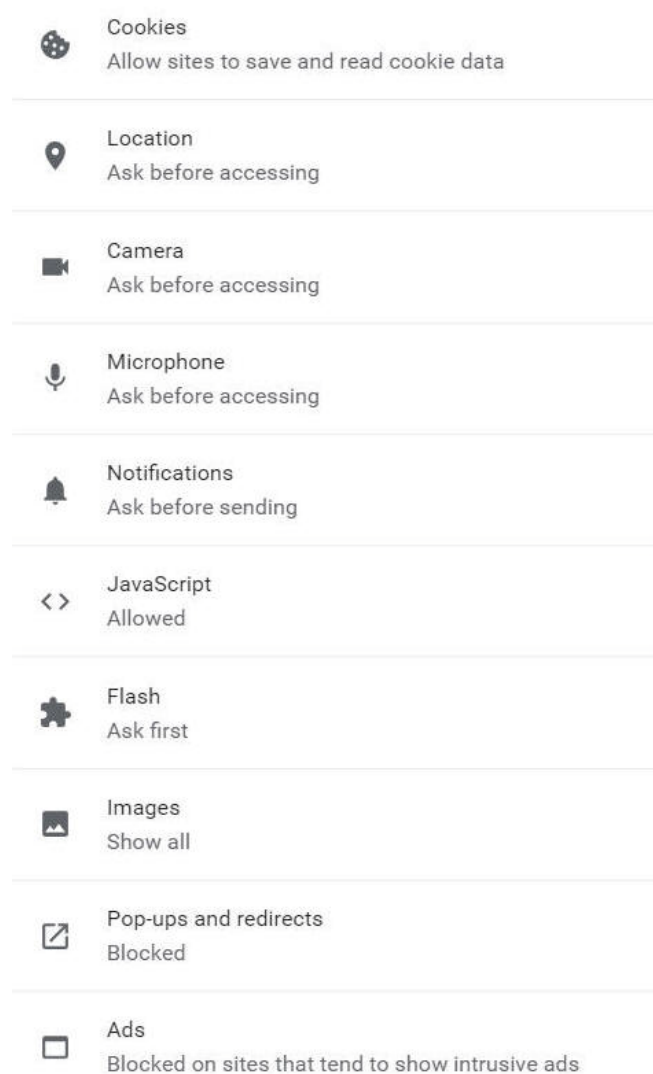


Security Settings

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.

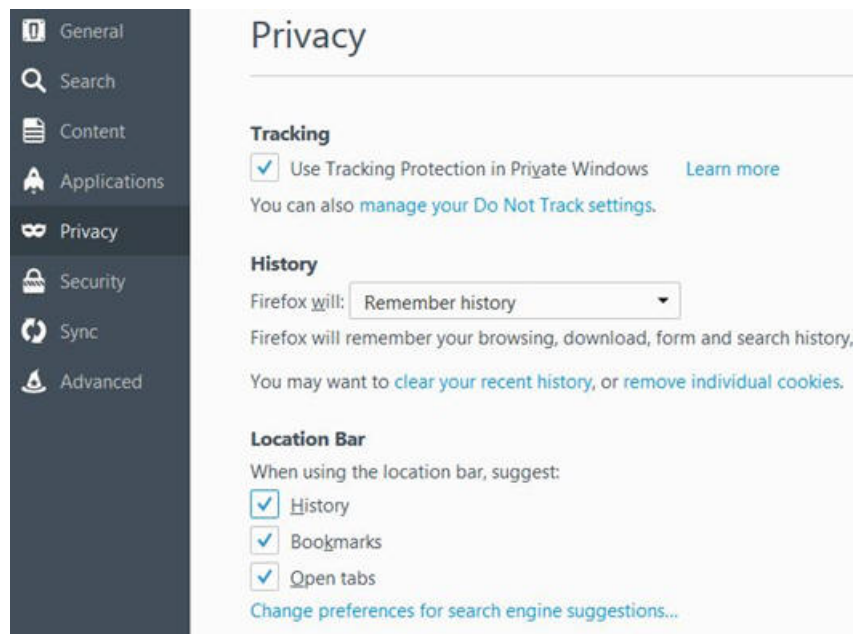
On Chrome, click **Customize and Control Google Chrome** button in order to access Settings->Privacy-> Content Settings.

Figure 1–5 Chrome Content Settings



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

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

Figure 1–6 Firefox Privacy Panel

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

Logging Into RPAS CE

This section details the available logging scenarios.

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

After you check the configuration, obtain the following information:

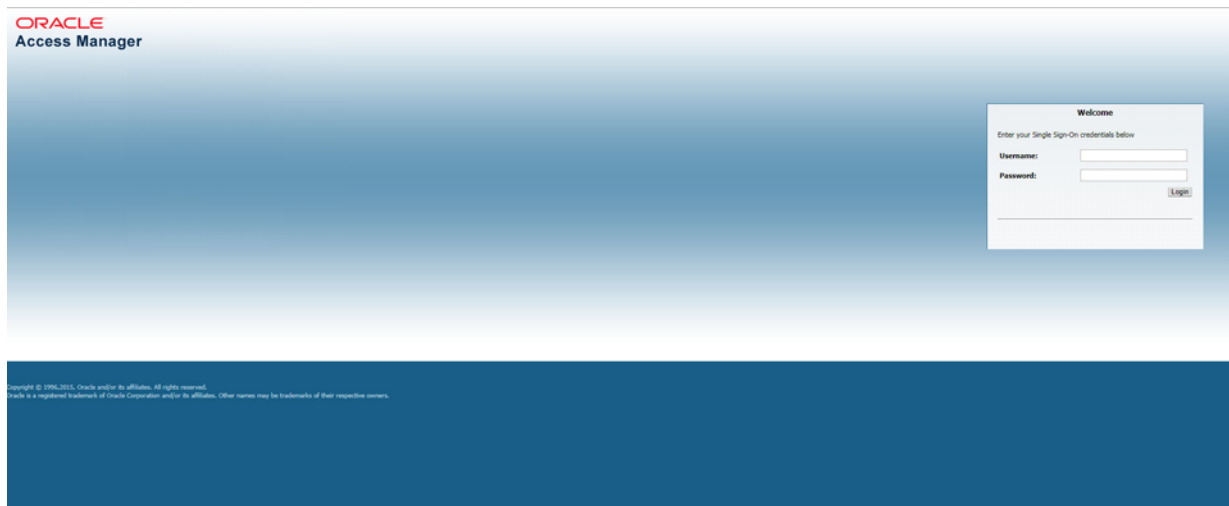
- **Uniform Resource Locator, URL:** Enter or click the application URL in the web browser or shortcut provided by your Administrator to access the application. For example:
`http://<fullyqualifieddomainname>:<port>/context root`
- **User name and Password:** Based on the tasks you want to perform, obtain a user account (that includes user name and password) to log into the application.

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

To log into the RPAS CE:

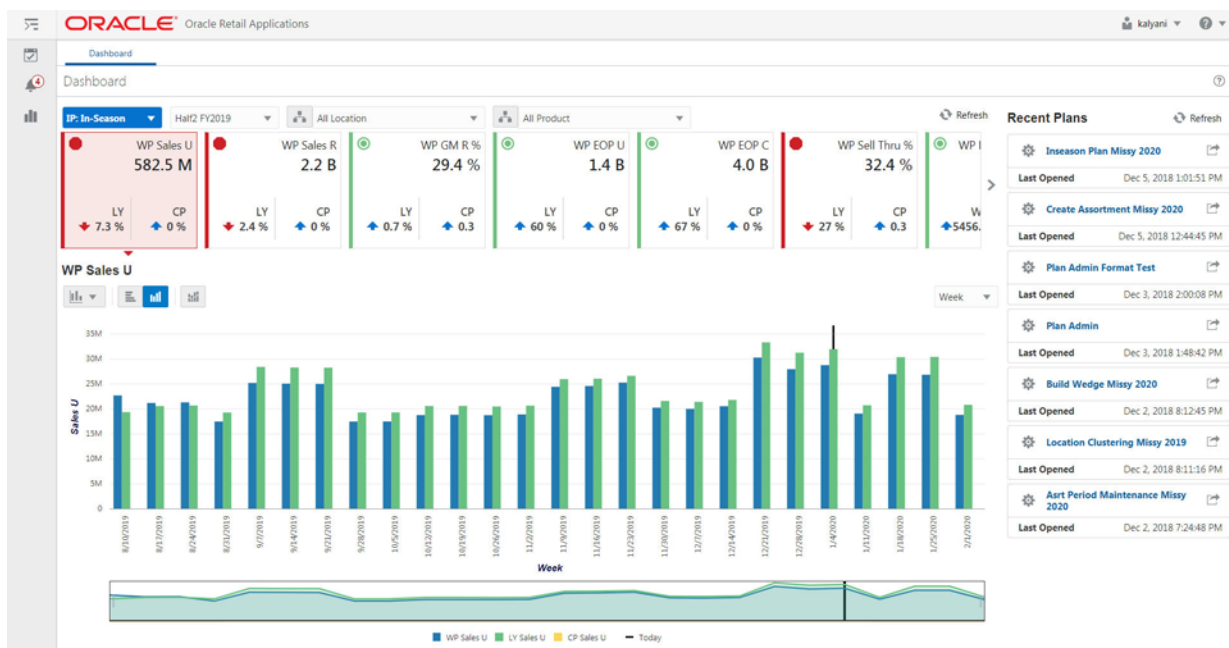
1. Open a supported internet browser.
2. In the Address bar, enter the RPAS CE URL and click **Enter**.
3. Enter the Username and Password details and click **Log In**.

Figure 1–7 Login Window



4. The RPAS CE Home page appears.

Figure 1–8 RPAS CE Home Page



Logging In Using Single Sign-On

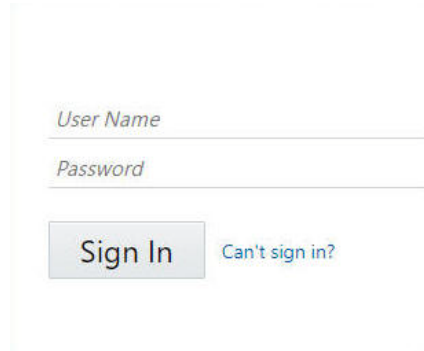
If you have accessed RPAS CE through a single sign-on environment, enter the Single Sign-On credentials. You see the home page of RPAS CE.

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

Logging in Using Oracle Identity Cloud Service

If you are using Oracle Identity Cloud Service (IDCS), you see the RPAS CE login page, as shown in [Figure 1–9](#). Enter values in the User Name and Password fields and click **Sign In** to access the RPAS CE home page.

Figure 1–9 Oracle Identity Cloud Service Login


 The image shows a login form with two input fields: "User Name" and "Password". Below the "Password" field is a "Sign In" button and a link that says "Can't sign in?".

Concurrent Sessions

If you already have a user session for RPAS CE 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 RPAS CE, if you have a concurrent session running, you see the following message:

Figure 1–10 Creating Concurrent Session


 The image shows a dialog box titled "Existing Connection(s) Detected". The text inside says: "There are other sessions in progress. This can be due to signing in on multiple devices, or leaving a browser tab open, or exiting the application before all processes are complete." Below this text are two radio button options:

- ☒ Create another session. (All existing connections will be left open)
- ☐ Close all existing connections and create a new one. (Any unsaved changes will be lost)

 At the bottom right of the dialog box are "Cancel" and "OK" buttons.

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 workspaces in such a way that you can view them at the same time and work on them in parallel.

Figure 1–11 Compare Workspaces in Separate Browser Tabs

The screenshot shows two browser tabs side-by-side. The left tab, 'Build Wedge Fall 2020', has a menu bar with 'Build Wedge', 'Wedge Alerts', 'Plan Buy Quantity', and 'Define Product Rollup'. Below the menu is a table with columns: 'Populate Wedge', 'Shopping List', 'Mandatory', and 'Options'. The table lists four products: '54291800 - Contrast Elbow Patch Cardigan - Black', '63214451 - Waffle Knit Shawl Collar Cardigan - Black', '65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather', and '77316938 - Angled Front Merino Wool Cardigan - Grey'. The right tab, 'Create Assortment Fall 2020', has a menu bar with 'Define Assortment' and 'Select Options'. Below the menu is a table with columns: 'Like Option' and 'Retail Price'. The table lists eight products: '50334589 - Short Sleeve Sweater', '50552500 - Extra Long Sleeve', '50633593 - Mock Neck Sweater', '51524128 - Mock Neck Sweater', '51532288 - Extra Long Sleeve', '51963371 - Ribbed Turtleneck', '52535633 - Ribbed Turtleneck', '53951493 - Ribbed Turtleneck', and '54016912 - Sleeveless Side Strap'.

This can be accomplished in one of two ways:

- You can launch the view in a separate browser tab in order to do comparative analysis. To do such an analysis, 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 navigate through various views in the workspace. However, you cannot navigate between different workspaces; you must close the tab and launch a separate workspace.
- You can compare the views in the concurrent login sessions. In this case, in the concurrent login session, you have access to all the features of RPAS CE. 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.

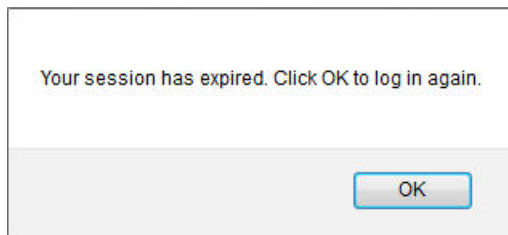
Figure 1–12 Compare Views in Concurrent Login Sessions

The screenshot shows two browser tabs side-by-side. The left tab, 'Build Wedge Fall 2020', has a menu bar with 'Build Wedge', 'Wedge Alerts', 'Plan Buy Quantity', and 'Define Product Rollup'. Below the menu is a table with columns: 'Populate Wedge', 'Shopping List', 'Mandatory', and 'Options'. The table lists four products: '54291800 - Contrast Elbow Patch Cardigan - Black', '63214451 - Waffle Knit Shawl Collar Cardigan - Black', '65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather', and '77316938 - Angled Front Merino Wool Cardigan - Grey'. The right tab, 'Assortment Services', has a menu bar with 'Assortment Services' and 'Select Options'. Below the menu is a table with columns: 'Like Option' and 'Retail Price'. The table lists eight products: '50334589 - Short Sleeve Sweater', '50552500 - Extra Long Sleeve', '50633593 - Mock Neck Sweater', '51524128 - Mock Neck Sweater', '51532288 - Extra Long Sleeve', '51963371 - Ribbed Turtleneck', '52535633 - Ribbed Turtleneck', '53951493 - Ribbed Turtleneck', and '54016912 - Sleeveless Side Strap'.

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 1–13 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.

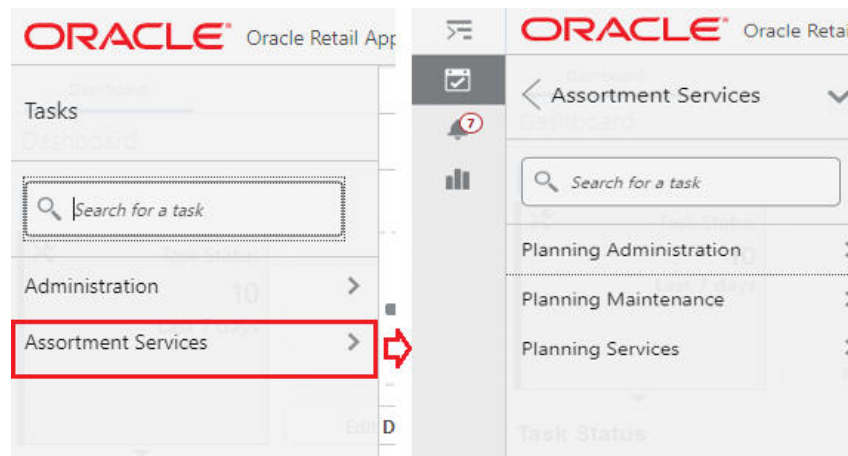
- If there are issues in the workspace itself regarding the performance or operation on the workbook, the user will see the message. Contact the application administrator in this situation.

Understanding the Taskflow

Click **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 activity groups, activities, and tasks.

Each activity group consists of more than one activity, and each activity may consist of one or more tasks. In RPAS CE, each solution (spanning across multiple workspaces) is represented by a taskflow.

Figure 1–14 Taskflow



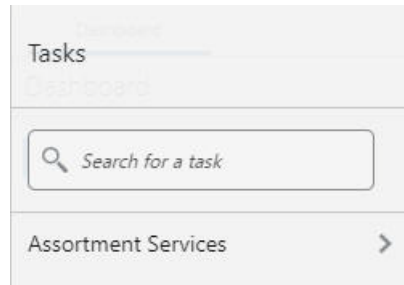
- In the taskflow, you can click the icon > next to any activity group to view the associated activities and tasks.
- Click a specific activity group to view the activities associated under the activity group.
- When you are working with a specific activity, click the icon > to display the available tasks.

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 workspace template that the task is assigned to.

The access to the workspace template is maintained in the Security Administration task. See the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide* for more information about the Administration tasks. If you do not have access to a workspace template, then you cannot build the workspaces for the associated tasks.

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

Figure 1–15 No Administrator Access

Switching Between Multiple Tasks

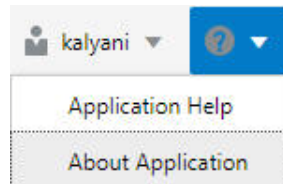
When working with multiple tasks (workspaces), all the changes you make in a specific task (workspace) are maintained when you move to a different task (workspace). In RPAS CE, all changes to a workspace are automatically saved when any calculation or other workspace action is performed on the workspace.

Workspace Operations

The workspace provides you a 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 icon in the top right and click **About Application** to access the Version Number and other information.

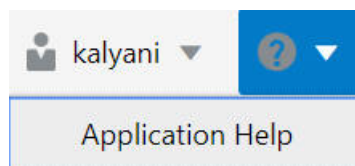
Figure 1–16 Accessing About Application

The [About Application Window](#) provides information about the application including version numbers for the domain, RASL, application, and plug-ins. [Figure 1–17](#) shows an example for RDF Cloud Service.

Figure 1–17 About Application Window

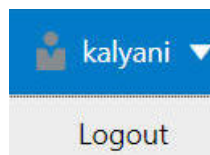
Accessing Online Help

Click the Question Mark icon in the top right, as shown in [Figure 1–18](#). Click **Application Help** to access the online help.

Figure 1–18 Accessing Online Help

Logging Out of the Application

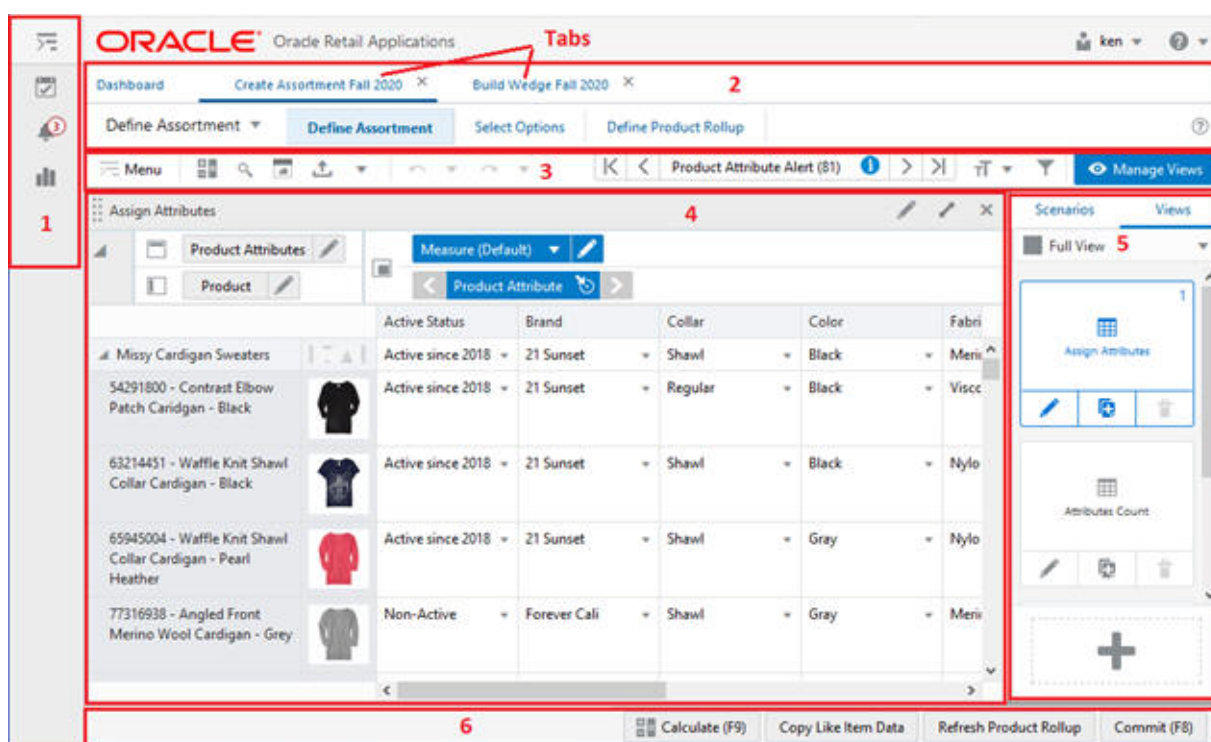
Click the user name in the top right and select **Logout**.

Figure 1–19 Logout

User Interface

This chapter introduces you to the user interface for the workspace 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

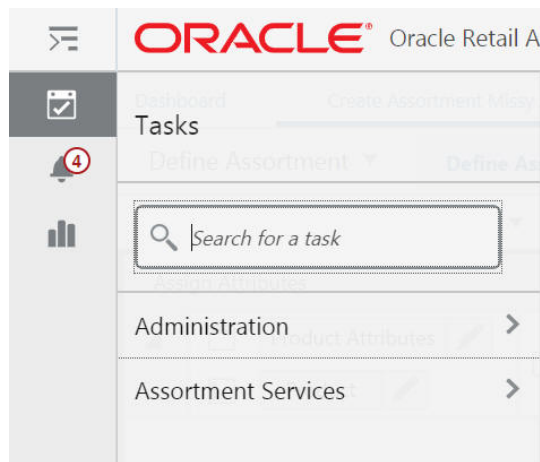
The Left Sidebar menu contains the following options:

- Task Module
- Notifications
- Reports

Task Module

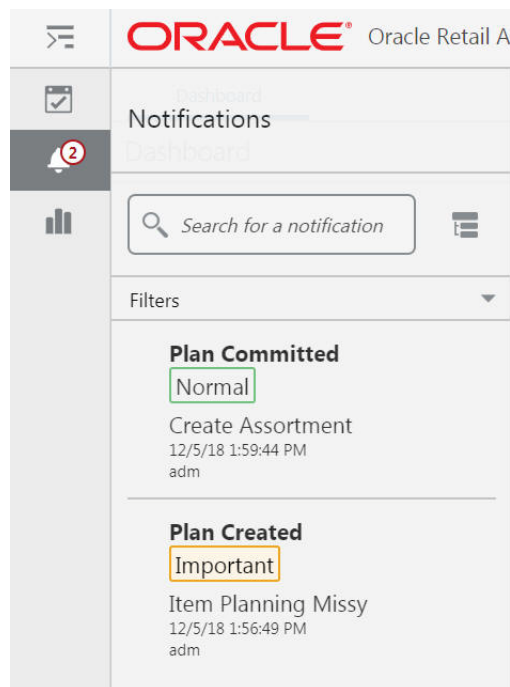
The Task Module provides access to the Segments dialog box that you use to open existing workspaces or create new workspaces to complete the different tasks per role.

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



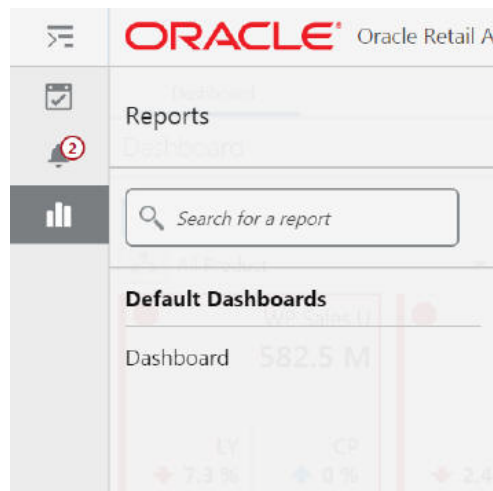
Notifications

You can use the Notifications module to determine the status of different RPAS CE 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

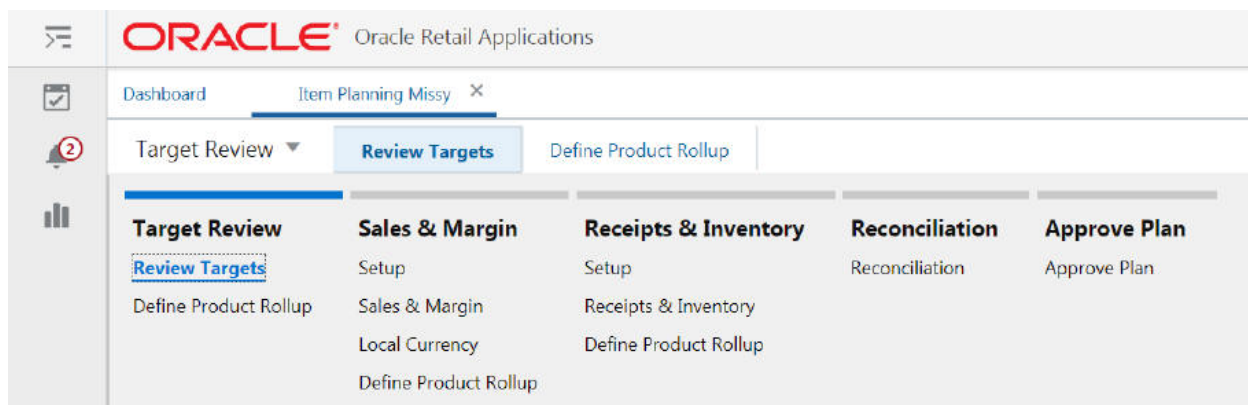
Mega Menu

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.

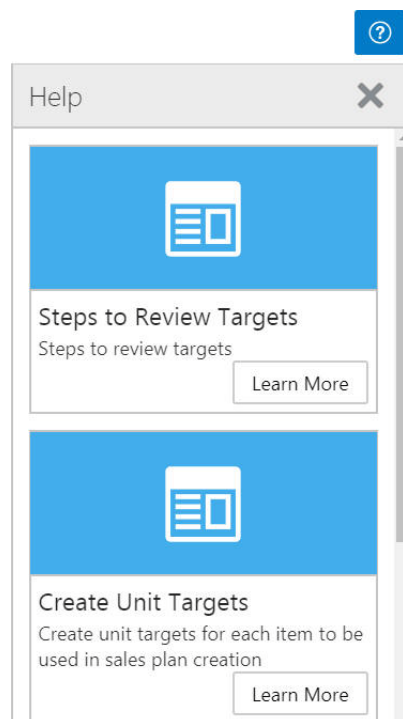
Figure 2–5 Mega Menu



Contextual Help

To access the Contextual Help, click the **Question Mark** located in the extreme right corner of the Mega Menu.

Figure 2–6 Contextual Help

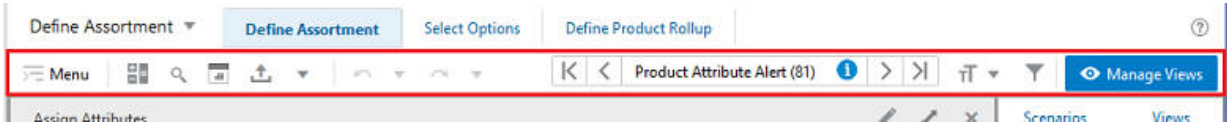


The planner can use Contextual Help to access relevant resources within the application that provide information about the particular context of the system feature that user is accessing. The help resources supported are documents and short videos.

Quick Access Toolbar

The Quick Access toolbar contains Menu, Calculate, Find, Export, Import Positions, Download DPM Import File Template, Undo, Redo, Real Time Alert Exceptions List, Text Size, Filter, and Manage Views. These are all described in this section.

Figure 2–7 Quick Access Toolbar



Menu

Menu contains the following menu options:

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

Figure 2–8 Quick Access Toolbar Menu Options

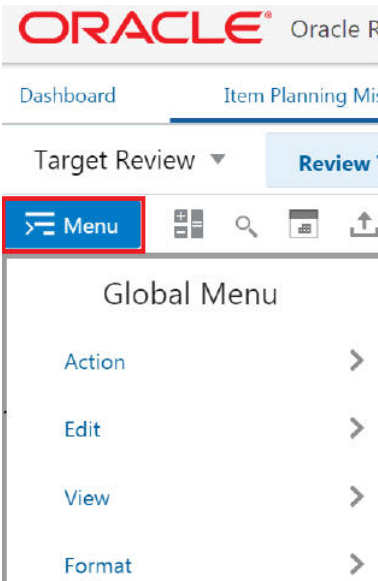


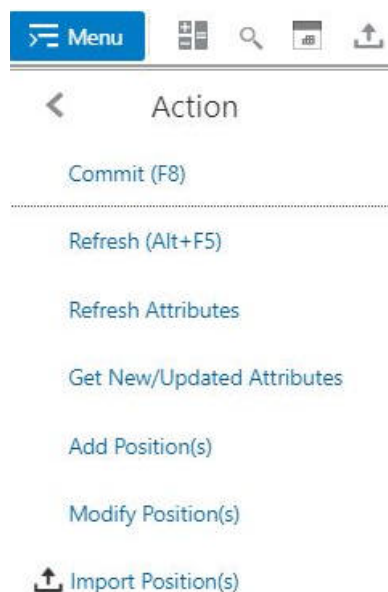
Table 2–1 lists the options within each menu.

Table 2–1 Toolbar Menu Options

Menu	Submenu	Sub-Submenu
Action	Commit (F8)	-
-	Refresh (Alt + F5)	-
-	Refresh Attributes	-
-	Get New/Updated Attributes	-
-	Add Positions	-
-	Modify Positions	-
-	Import Positions	-
Edit	Calculate (F9)	-
-	Find (Ctrl + F)	-
-	Undo (Ctrl + Z)	-
-	Redo (Ctrl + Y)	-
View	Synchronize Z-Axis	-
	View Layout	
Format	Edit Styles and Exceptions	-
-	Save Format	Only For Me
-	-	For My Group: Group Name
-	-	Workspace Template
-	Restore Format	From Template
-	-	From My Group: Group Name
-	Delete Format	Only For Me
-	-	For My Group: Group Name
-	-	Workspace Template

Action Menu

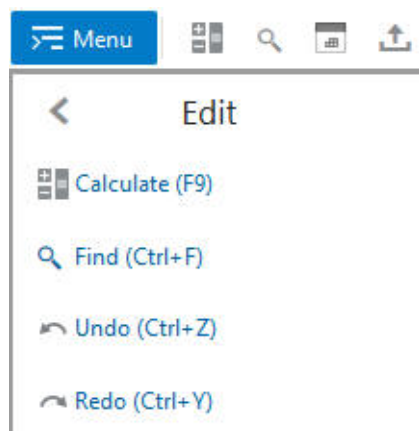
This section describes the Action Menu options.

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 (Alt + F5)	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. Make sure to switch on the FnLock key if present on your keyboard in order to use this shortcut.
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.
Get New/Updated Attributes	Newly created or updated attributes and attribute values using Placeholder Maintenance will be made available for use throughout the workspaces.
Add Positions	Use to add new placeholder positions using the Placeholder Maintenance functionality
Modify Positions	Use to modify or delete the already created placeholder positions using the Placeholder Maintenance functionality
Import Positions	Use to manually import a list of placeholder positions that you have already entered into an Excel file format.

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 menu to calculate and update the associated cells within the workspace.
Find (Ctrl + F)	Use to search for a string within the rows and columns of the current view. The search does not include the data within the cells of the view.
Undo (Ctrl + Z)	Use to undo the last action performed within the workspace (not just the current view).
Redo (Ctrl + Y)	Use to redo the last action undone within the workspace (not just the current view).

View Menu

This section describes the View Menu options.

Figure 2–11 View Menu

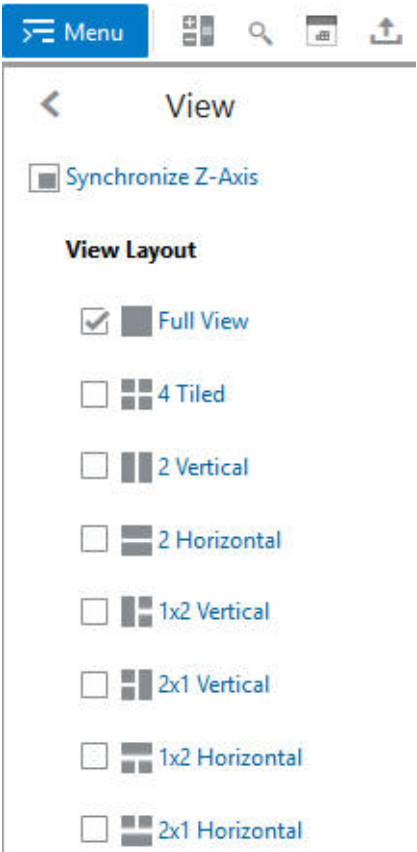


Table 2–4 View Menu Options

Menu Option	Description
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.
View Layout	Select a view layout from the options available to see a single or multiple views at a time.

Format Menu

This section describes the Format Menu options.

Figure 2–12 *Format Menu*

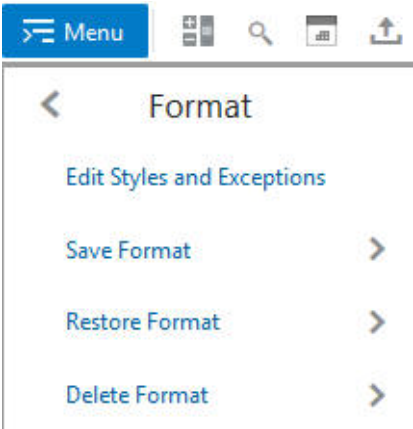
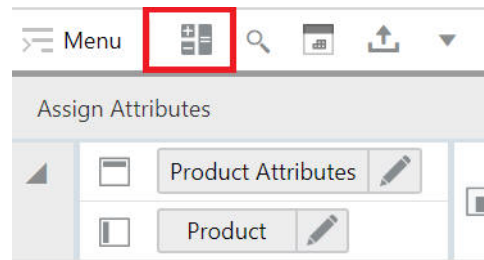


Table 2–5 *Format Menu Options*

Menu Option	Sub-Menu	Description
Edit Styles & Exceptions		Opens the Format dialog box. Here, 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."
	Only For Me	Save the format only for my use.
	For My Group: Group Name	Save the format for my group. All the users in the group will be able to see the formatting.
Save Format	Workspace Template	Save format to the workspace template.
	From Template	Restores my current formatting to the workspace template.
	For My Group: Group Name	Restores my current formatting to my group's format.
Restore Format	Only For Me	Deletes the format only for me.
	For My Group: Group Name	Deletes the format for all the users in my group.
	Workspace	Deletes the workspace template.
Delete Format		

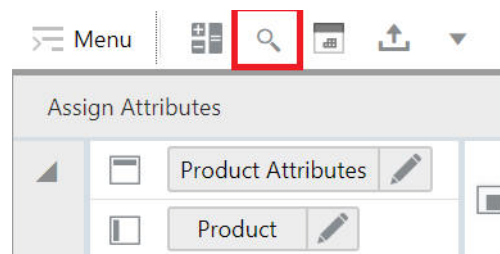
Calculate

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

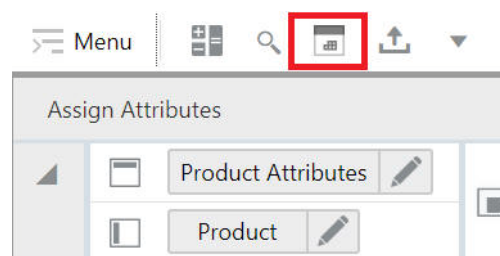
Find

You can use the **Find** button to find any specific string within rows and columns of the current view. You can also choose to search the string in all views or current view of the workspace or all dimensions or specific dimensions available in the current view.

Figure 2–14 Find Button

Export

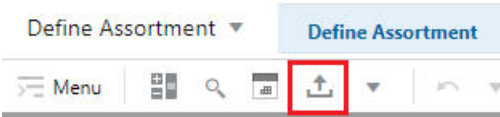
You can use the Export functionality to export slices of data to a text file or to a Microsoft Excel file by using different format and export options. You can print data to an Excel spreadsheet using the **Print** option in the Export dialog box.

Figure 2–15 Export Button

Importing Positions

Import Positions is used to manually import a list of Placeholder positions that you have already entered in an Excel (.xlsx) file format. It loads the positions listed in the file to the Add Product dialog box for validation and highlights errors for corrections that are required. This facilitates the easy and quick bulk creation of placeholder positions.

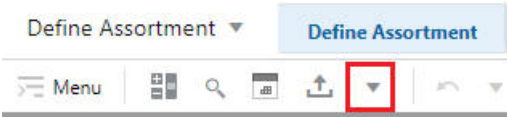
Figure 2–16 Import Positions



Downloading DPM Import Template File

Click Download DPM Import File Template button to download the file template that you can use to populate an Excel file with placeholder positions and their information.

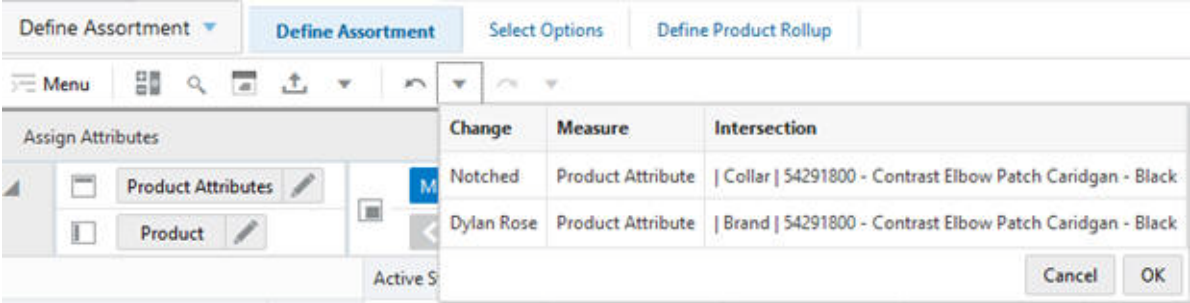
Figure 2–17 Download DPM Import Template File



Undo

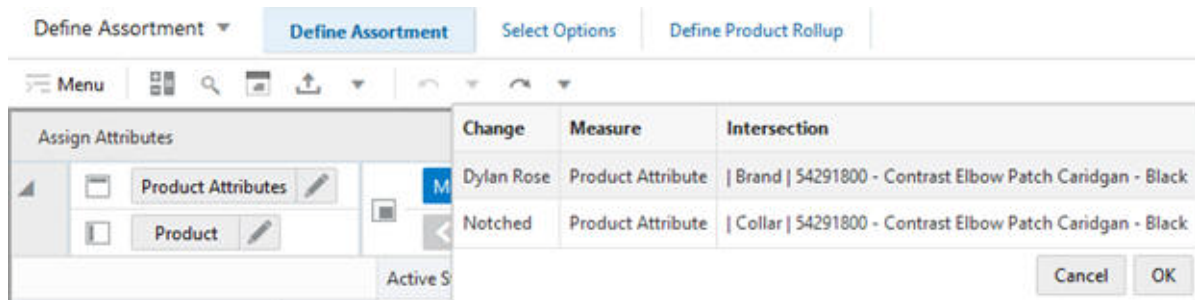
You can use the Undo functionality to undo the list of actions performed within the workspace until the last calculate operation. All the actions performed are displayed in descending order, and you can choose to undo the latest action or the series of actions one step at a time or all the actions performed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

Figure 2–18 Undo Button



Redo

You can use the Redo functionality to redo the list of actions undone within the workspace previous to the last calc operation. All the actions undone are displayed in descending order, and you can choose to redo the latest action, the series of actions one step at a time, or all the actions undone (previous to the last calc operation) by selecting the first action (the last one in the list).

Figure 2–19 Redo

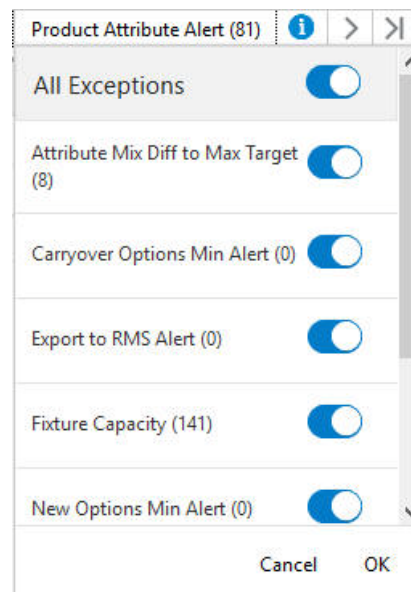
Note: If either an SHS or a picklist measure has an NA value, the measure's cells will display an NA value after a worksheet load. When the user edits either the SHS or the picklist measure cell value, the previous value (in this case NA) will be displayed in the Undo list.

If either an SHS or a picklist measure does not have an NA value, the measure's cell will not display a value. (That is, the cell will be blank or have an empty string.) When the users edits either the SHS or the picklist measure, the previous value (that is, null/empty string) is displayed in the Undo list.

For a string measure, if there is no NA value, then the empty string is the NA value. For other types of measures (an int measure or a float measure), if there is no NA value, then the default value is 0.

Real Time Alerts Exceptions List

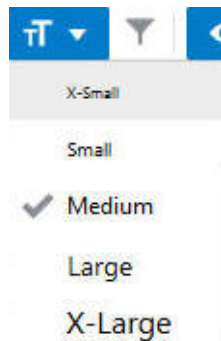
Real time alerts are interactive alerts that are displayed within a workspace. The alerts are then updated each time you edit data and click **Calculate**. You can see the alert count and other information about the alerts as required. Clicking > or < launches the alert navigation mode.

Figure 2–20 Real Time Alerts Exception List

Text Size

Once you open the workspace, click **Text Size** and select the text size in order to control how much data is displayed on the screen.

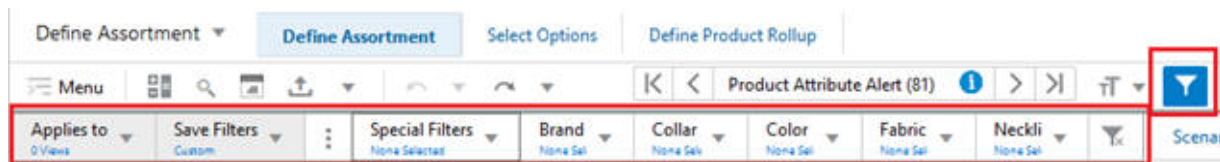
Figure 2–21 Text Size Options



Workspace Filters

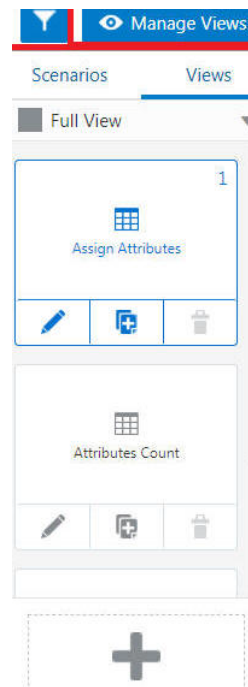
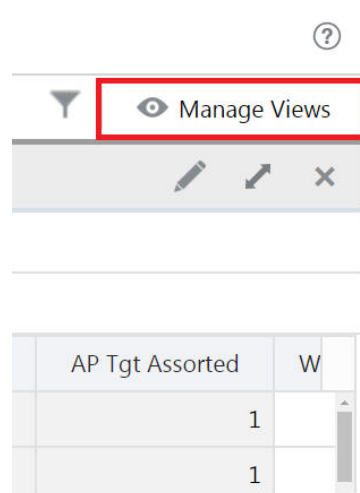
You can use the Workspace Filter Icon to view /hide the workspace filters. You can choose to enable/apply the special filters and attribute filters in a view or selected views of the workspace.

Figure 2–22 Workspace Filters



Managing 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 2–23 View Management Drawer: Show**Figure 2–24 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 displays 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 2–25](#) shows the various components in the content area.

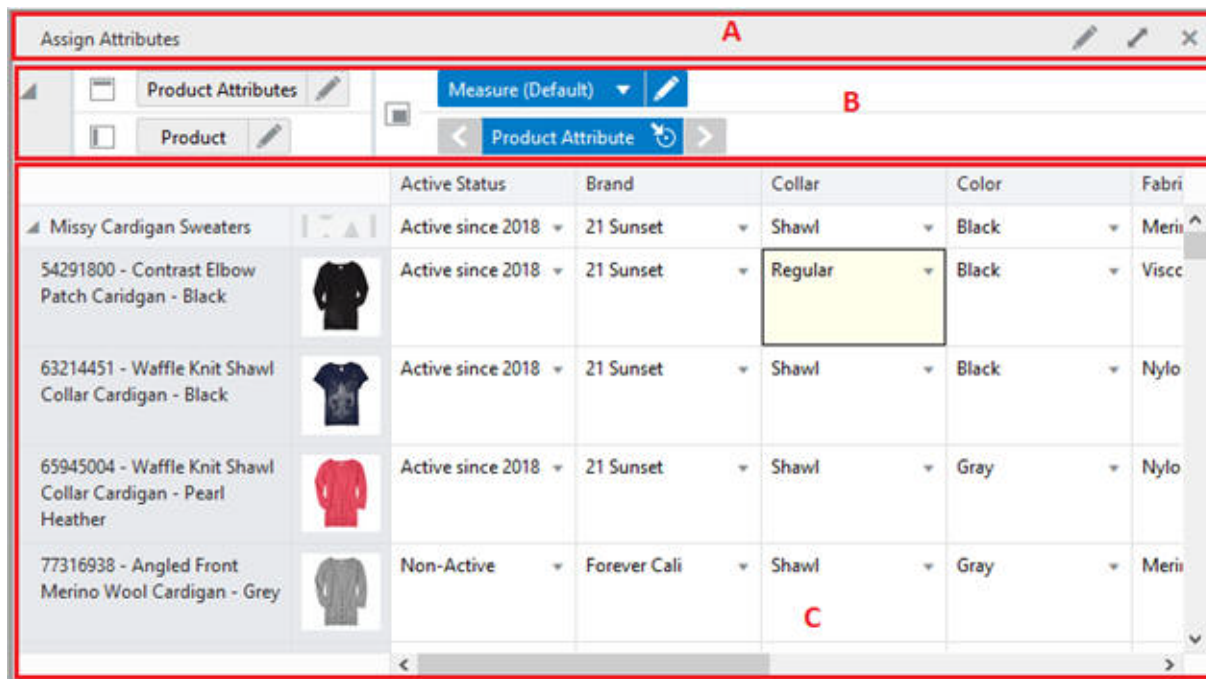
Figure 2–25 Content Area Components

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.

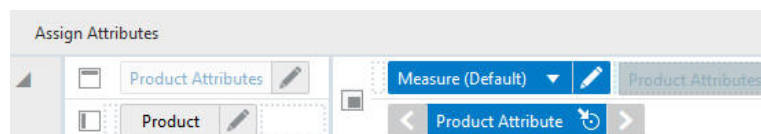
The RPAS CE Client is designed to help you to work with the easy selection of dimension levels within the Edit view. You can manage the way the information is presented in a view. You can arrange and present the information in a layout you want by rotating or pivoting dimensions across the axes, changing 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 2–26 Page Edge and Dimension Tiles Area

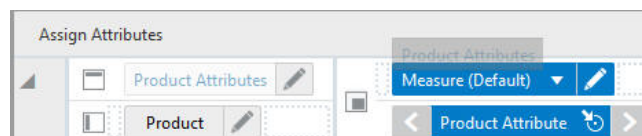
Pivoting and Rotating Dimensions

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.

Figure 2–27 Dimension Move

- **Dimension Swap:** Swaps a dimension with another dimension on the axis.

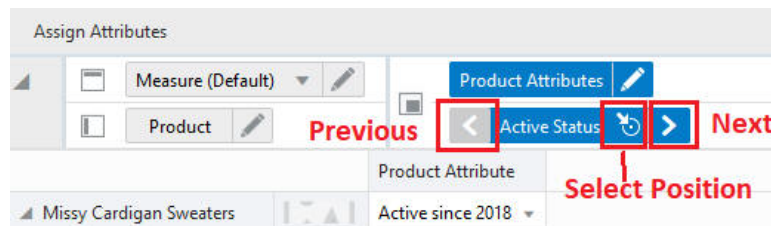
Figure 2–28 Dimension Swap

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.

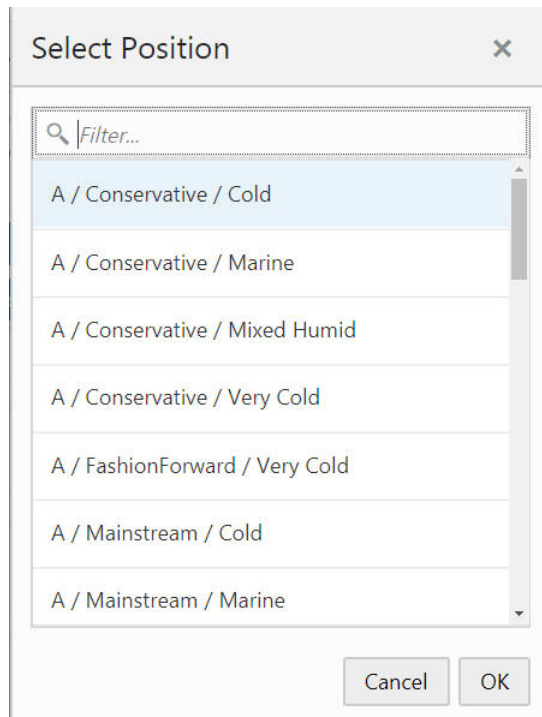
Figure 2–29 Position Navigation

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

position. When you navigate to a new position, all associated positions at the higher and lower visible levels of the same dimension are updated recursively.

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

Figure 2–30 Select Position



Edit View

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

Synchronize Z Axis Scrolling

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

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

To enable synchronized Z Axis scrolling, click **Synchronize Z Axis** icon in the z axis and Dimension Tiles area, as shown in [Figure 2–32](#).

Figure 2–31 Before Synchronizing Page Edge (Z-Axis)

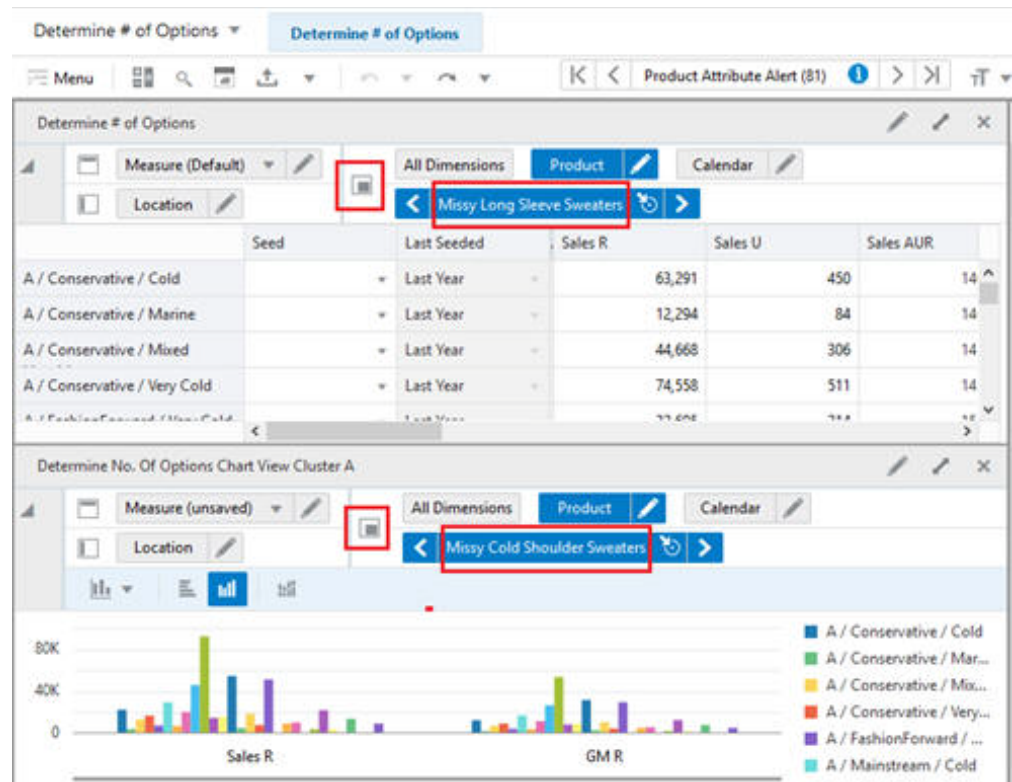
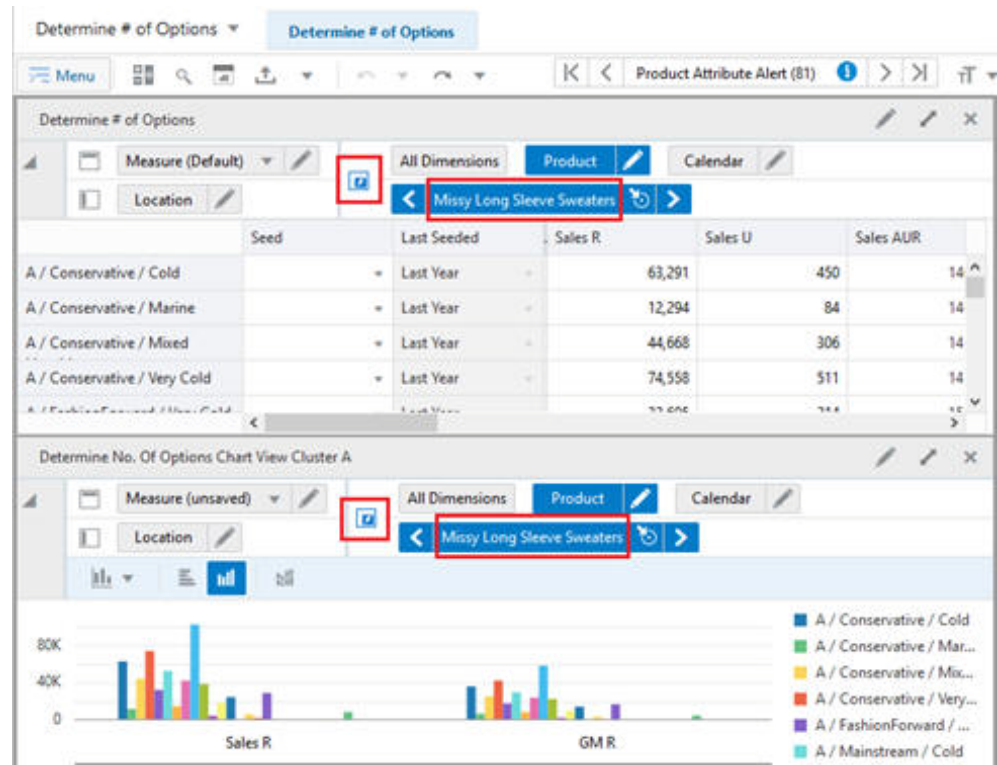


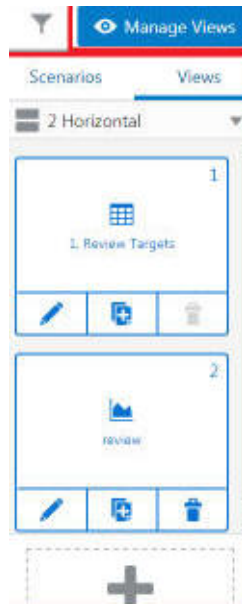
Figure 2–32 Enabling Synchronize Z-Axis



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 2–33 View Management Drawer



Action Tray

The Action Tray includes Application Actions and System Actions. Application actions are specific to different applications configured in RPAS CE. 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 2–34](#) and [Figure 2–35](#).

The System Actions include Calculate, and Commit. System Actions are highlighted in green in [Figure 2–34](#) and [Figure 2–35](#). As you can see, they are common across different applications, in this example across both MFP R CS and IP CS.

Figure 2–34 Example of Application Actions and System Actions in MFP R CS

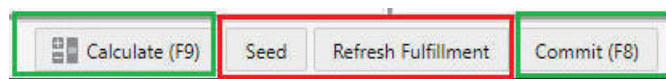
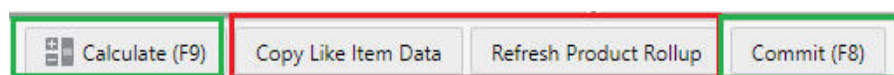


Figure 2–35 Example of Application Actions and System Actions in IP CS



Dashboards

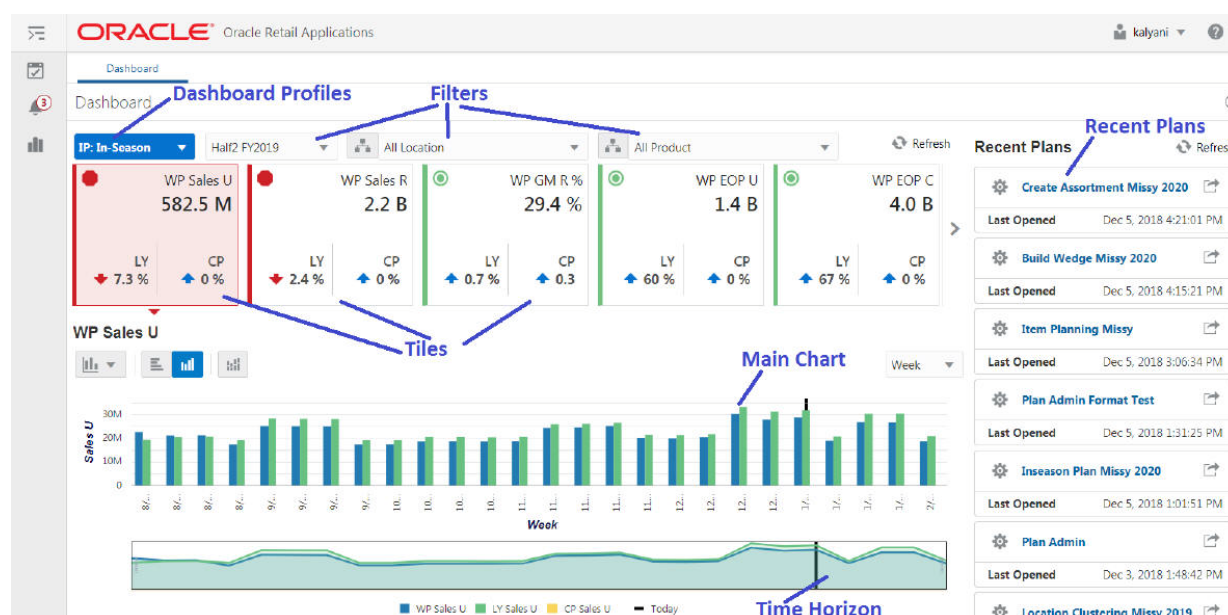
The RPAS CE Dashboard is the central page of any RPAS CE-based product. It is the first page that you see after logging into the application. It can be used to locate issues that need attention. It can also be used for data analysis, allowing you to examine your data at any scale and for any time frame. 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 RPAS CE application. Measure information in a dashboard can be refreshed at any time.

Metric and Exception Dashboard profiles can both be configured without the calendar dimension. This allows the user to focus on the current period and take appropriate planning actions.

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).

These metrics can include KPIs, as well as basic metrics such as sales figures. In many cases, the information present in a metric tile is supplemented with one or two additional metrics. These often serve as references to provide a contextual indication of how the value presented compares to some other value. These comparison metrics can be the corresponding values for the prior period or some planned performance expectations.

Figure 3–2 Example Metric Variance 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,

- Value. In [Figure 3–2](#), WP Sell Thru % is the title.
- An aggregate quantity. In [Figure 3–2](#), 7.0% and 19% and 0.1%. This number reflects the filter selections.
- Comparison Values. When defining comparison metrics in configuration, it is desirable to provide configured thresholds.
- A color state and icon. When the value of the metric is greater or lesser than a configured threshold, the color of the metric tile indicates:
 - Blue: no defined thresholds for tile
 - Green: threshold defined but values within the boundaries of the thresholds
 - Yellow: values exceed the defined medium threshold but within the boundaries of the defined severe threshold
 - Red: values exceed the defined severe threshold

When an application is configured with tile color state information the information badge will show next to the title in the chart area. Clicking the information badge will show information on the configured thresholds.

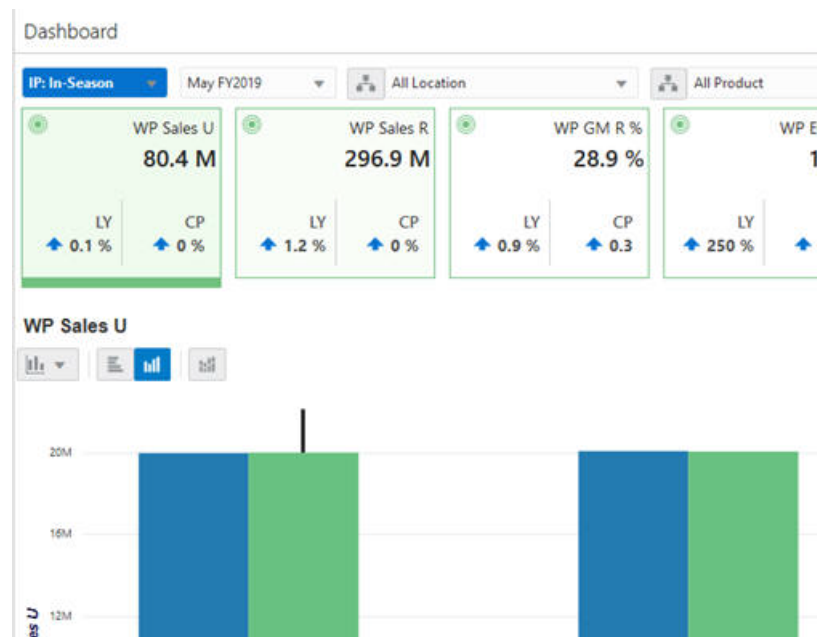
In [Figure 3–3](#), WP Sell Thru % is shown in a red octagon (indicating a problem) because the working plan value is 19% below the Last Year value. The grey tile is used for administrative information.

Figure 3–3 Tiles Showing Color State and Icon



The arrow beneath a tile, shown in [Figure 3–4](#), 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 3–4 Selecting a Tile

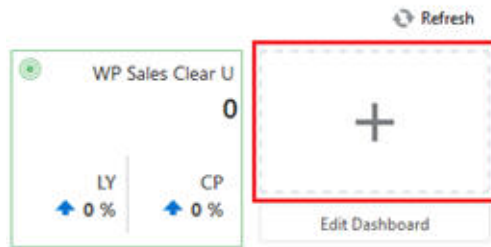


Metric tiles must represent the basic quantities that are used to indicate the health of your business. An implementer can create new metric tiles, modify existing ones, or delete tiles entirely.

Adding a New Tile

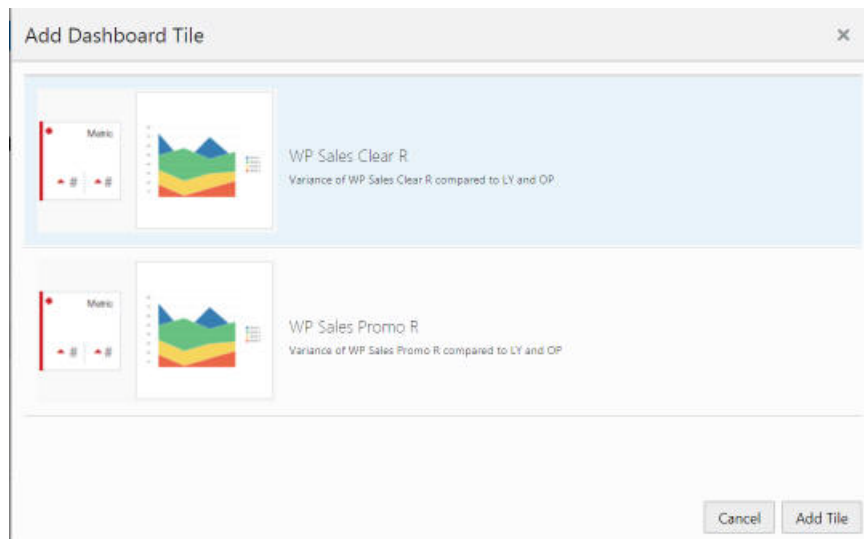
You can add a metric tile from an existing pool of tiles. To add a new tile, click **Plus** on the right hand side of the metric tile carousel (some scrolling may be required).

Figure 3–5 Add New Tile



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

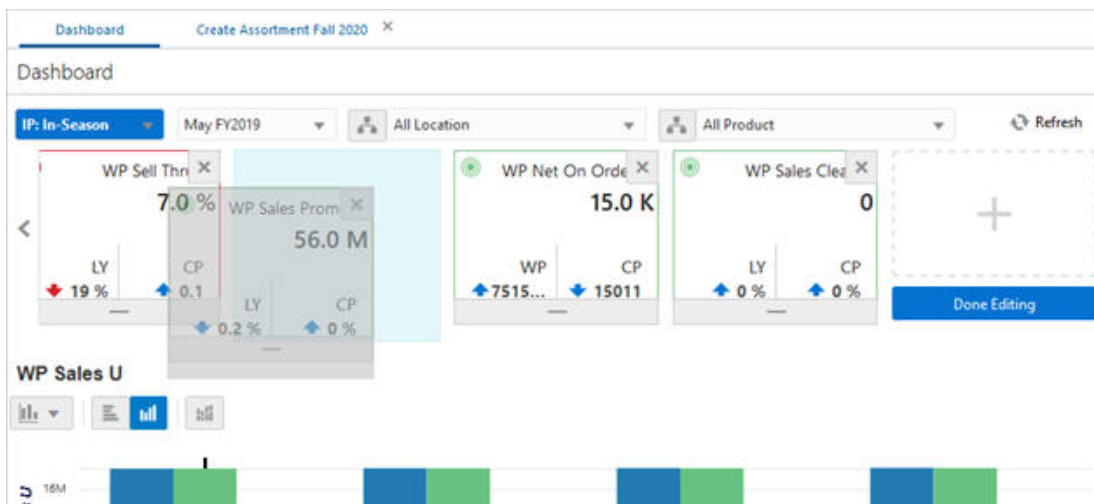
Figure 3–6 Available Metric Tiles



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 3–7 Changing the Display Order

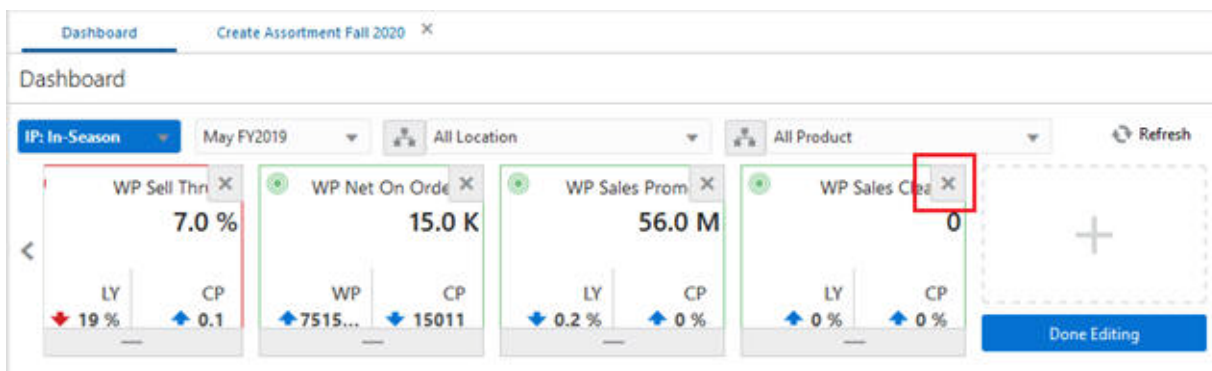


Removing a Tile

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 RPAS CE. The system remembers the desired order and content until you change it.

Figure 3–8 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.

If the user zooms on the main chart or scrolls through it, it might extend beyond the scope of the top filters. A message *Dashboard chart is out of sync with Calendar filter* is displayed that indicates this. The Calendar label in the message will be based on the dimension used on X-axis. A link to Sync the chart to match the top filter selection is provided with the message.

The number of data points for charts are configurable. See the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide* for further details.

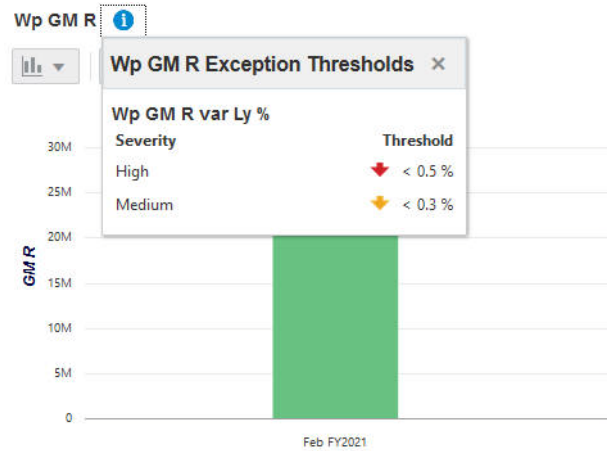
Figure 3–9 Main Chart



Information Badge

The metric information badge on the dashboard is available next to the metric name. Click the letter i enclosed in a circle (i), as shown in Figure 3–10, to display more detailed information, such as the thresholds that determine the tile's priority-state and the color when a tile is selected. This information can help you determine the magnitude and importance of a plan variance.

Figure 3–10 Dashboard Badge



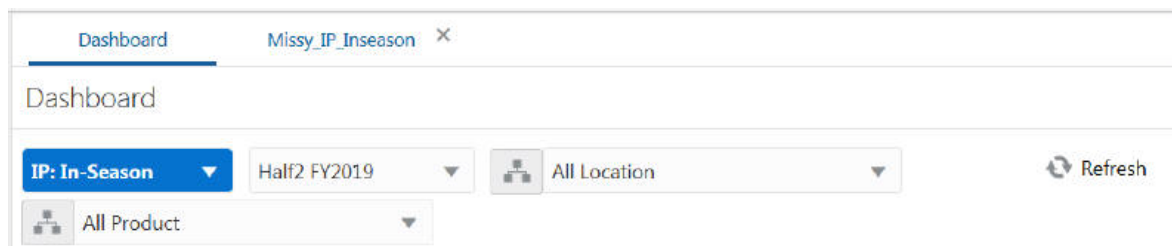
Modifying the Chart Type

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 3–11 *Modifying the Chart Type*

Filters

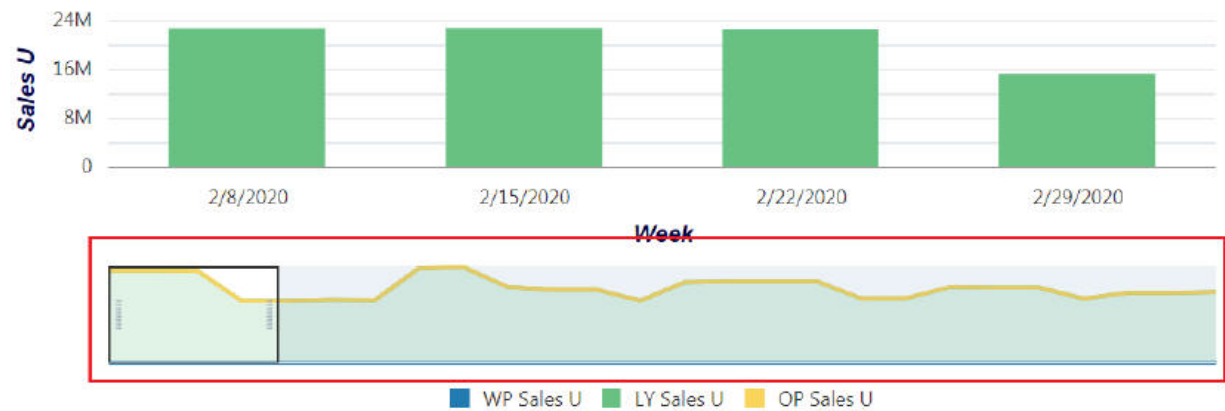
You can change the positions shown for each dimension by making selections in the filters at the top of the screen above the metric tiles. The season profile can have more than a year time period.

Figure 3–12 *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 3–13 Time Horizon



Recent Plans

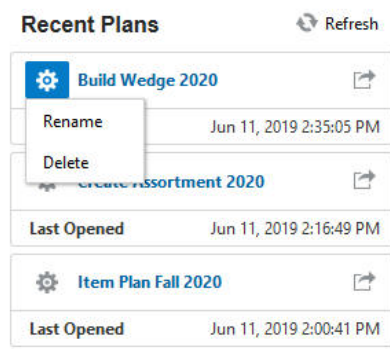
You can view and select from a list of most recently visited workspaces by choosing a workspace from the Recent Plan/Workspaces section in the top right of the screen. This does not list all available workspaces, only the most recent. Use **Refresh** to update the list with the most recent plans.

Figure 3–14 Recent Plans

Recent Plans		Refresh
⚙️ Item Planning Missy	🔗	
Last Opened	Dec 5, 2018 4:23:57 PM	
⚙️ Create Assortment Missy 2020	🔗	
Last Opened	Dec 5, 2018 4:21:01 PM	
⚙️ Build Wedge Missy 2020	🔗	
Last Opened	Dec 5, 2018 4:15:21 PM	
⚙️ Plan Admin Format Test	🔗	
Last Opened	Dec 5, 2018 1:31:25 PM	
⚙️ Inseason Plan Missy 2020	🔗	
Last Opened	Dec 5, 2018 1:01:51 PM	
⚙️ Plan Admin	🔗	
Last Opened	Dec 3, 2018 1:48:42 PM	
⚙️ Location Clustering Missy 2019	🔗	

You can rename or delete recent plans by clicking the Gear icon before the plan name. You can also view the most recently opened data and time for the workspace. Click the plan name to open the workspace within the application window or click the Launch in separate tab icon to open it in a new browser tab.

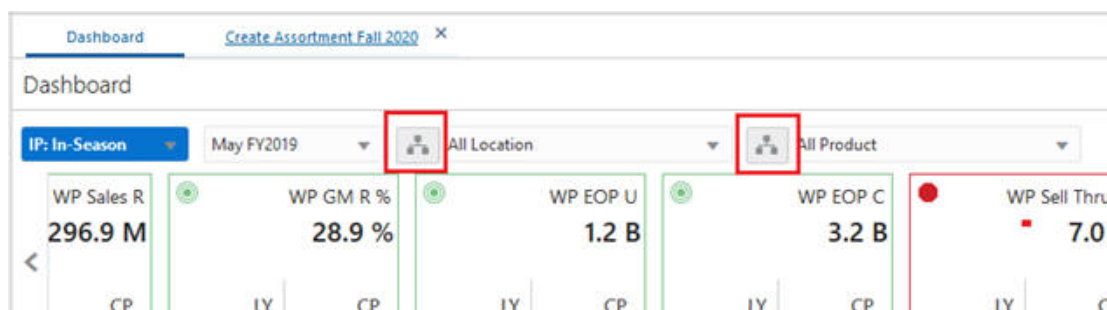
Figure 3–15 Recent Plans Action Menu



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 3–16 Dynamic Hierarchy Roll-Up



Sort on Dashboard

In the charts, you can sort the positions on the X axis by an available measure. You can also sort by Alert count in case of exception dashboard profile.

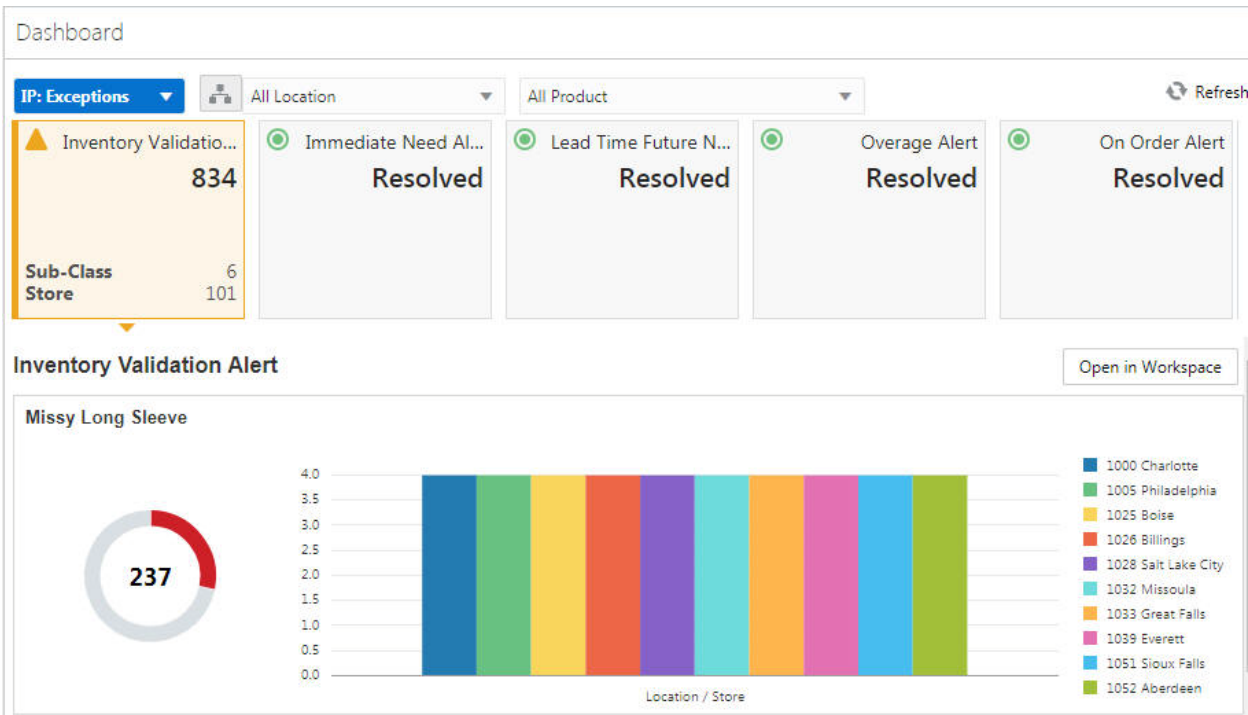
Figure 3–17 Sort on Dashboard



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.

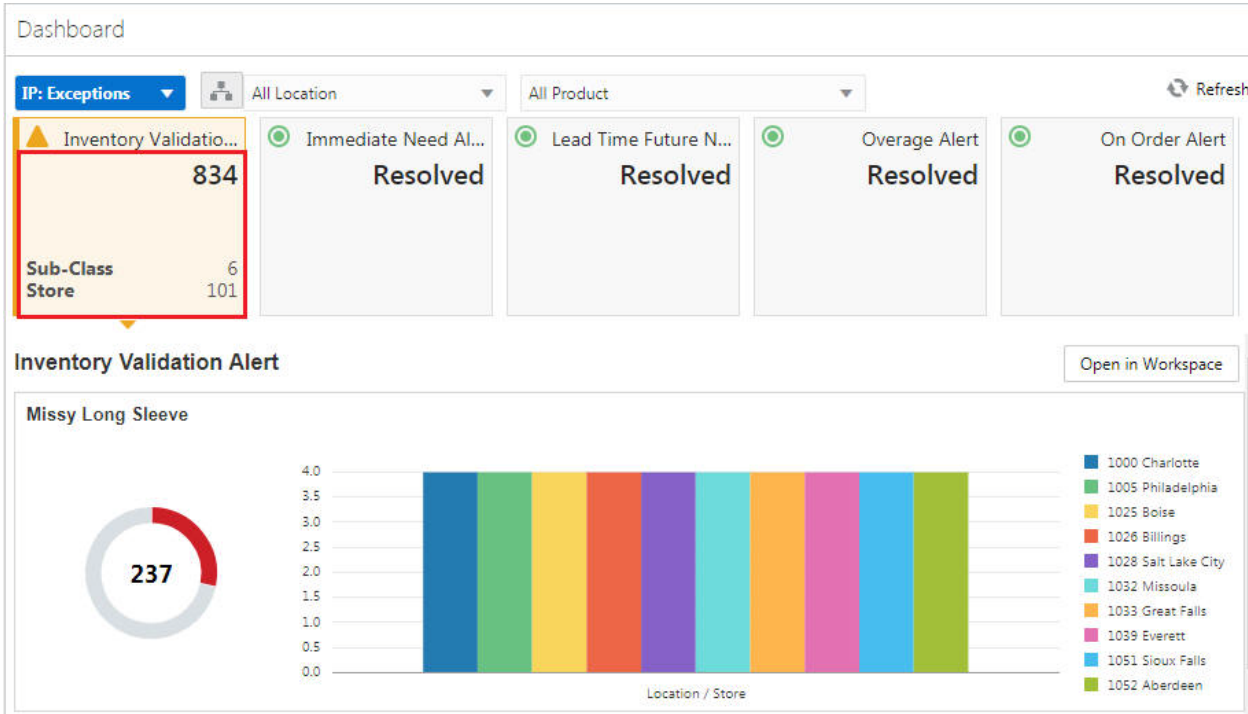
Figure 3–18 Exception Dashboard



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.

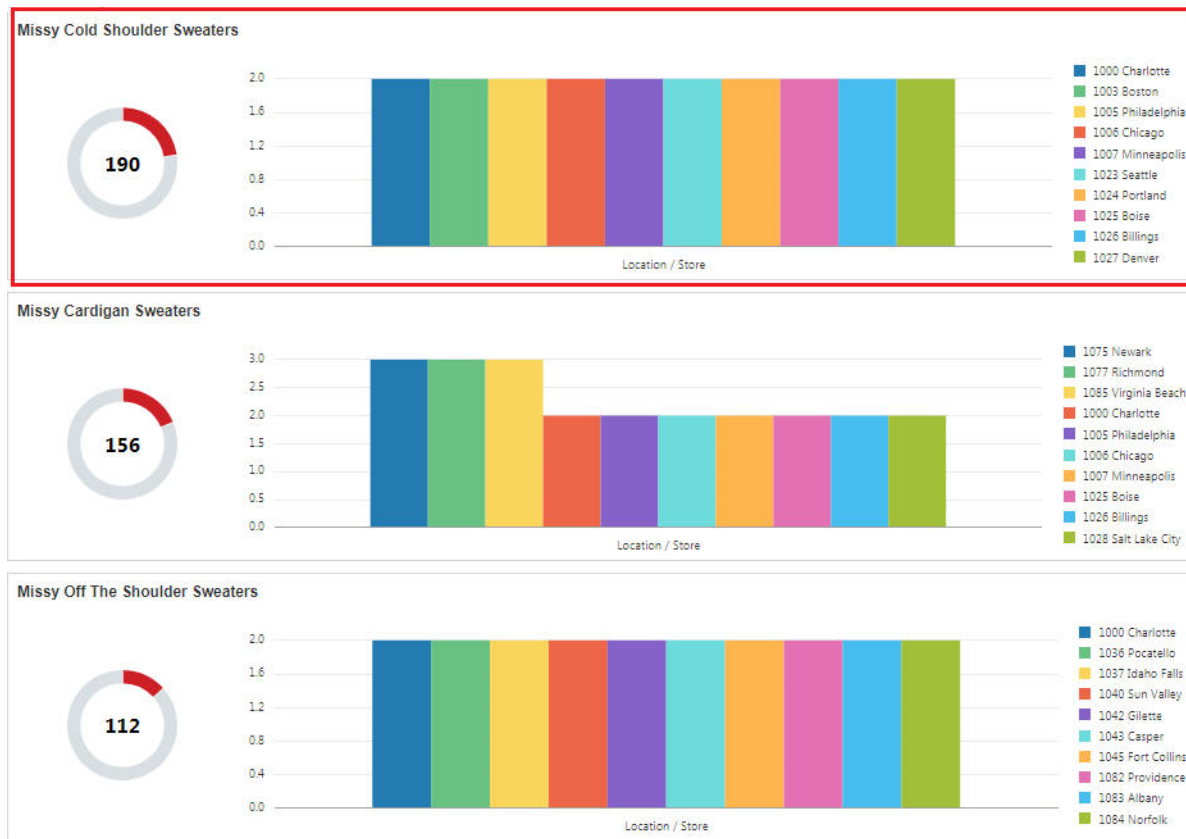
As shown in [Figure 3–19](#), the selected tile has a total of 834 exceptions at four different subclasses. In the detail section under Alert Inventory Validation Count you can see four different graphs, one for each subclass with locations as the legend.

Figure 3–19 Exception Tile Summary



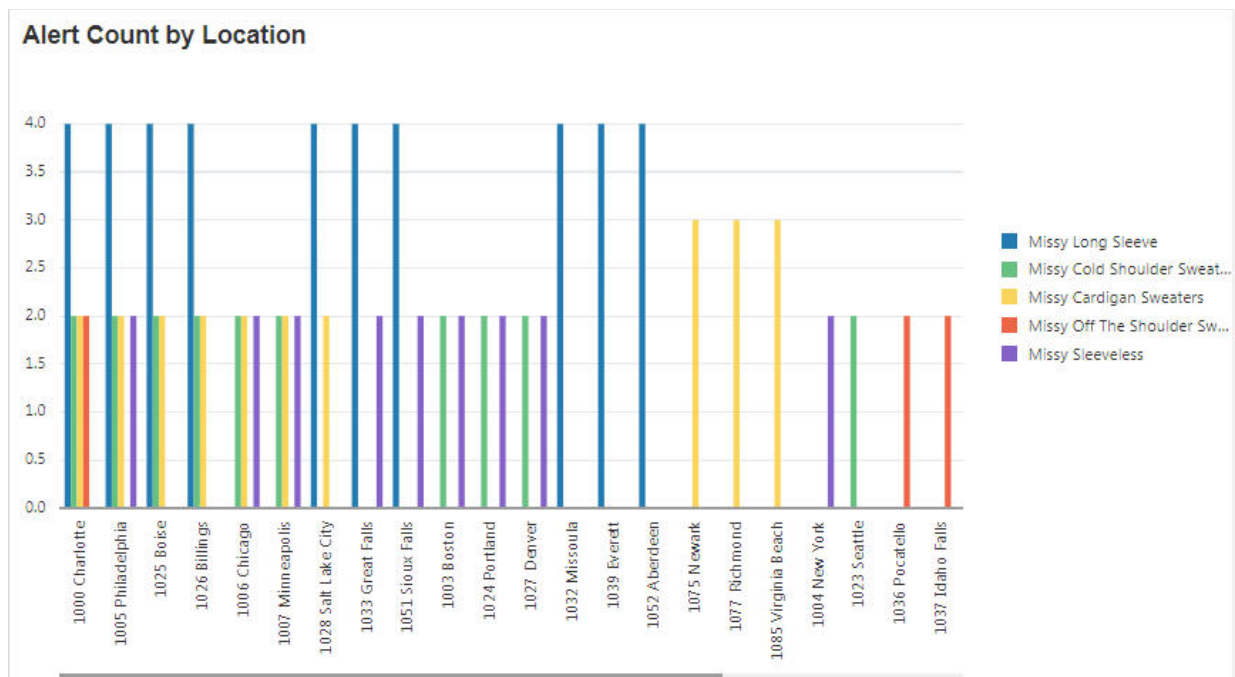
The detail pane associated with an Exception Tile provide a more granular description of the location of exceptions and leverages dashboard filtering to allow you to direct the sequence in which to visit the exceptions.

In [Figure 3–20](#), the Missy Cold Shoulder Sweaters subclass has 190 exceptions across several location that are displayed in the graph legend.

Figure 3–20 Sweater Exceptions Example

As shown in [Figure 3–21](#), the selected alert has total 834 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 Exception Summary Example



When all the exceptions are resolved, you will see the below message on the Exception Dashboard.

Figure 3-22 Resolve Exceptions

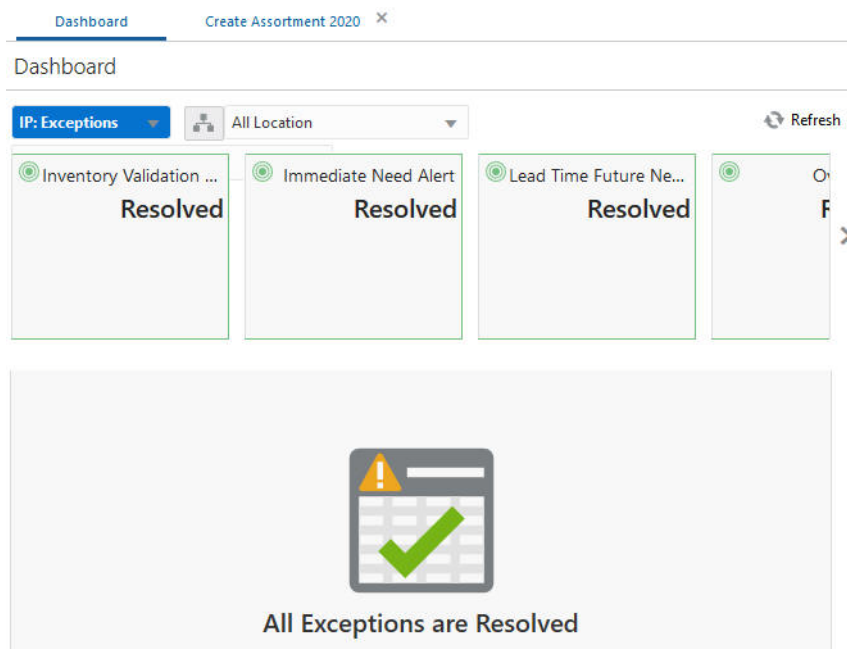
Net On Order Warning (Alert Navigation Mode) 46 of 1113 alert hits are visible

Menu Search Filter Location Calendar

2. Plan Receipts & Inventory

Location: 1034 Bozeman

	WP Event	WP BOP U	WP Net Sales U	WP Receipts U	On Order U	WP EOP U	What
Missy Cardigan Sweaters		3	1	0	0	1	
54291800 - Contrast		2	1	0	0	2	
63214451 - Waffle Knit		0	0	0	0	0	
65945004 - Waffle Knit		0	0	0	0	0	
70063172 - Merino Wool		0	0	0	0	0	
72939751 - Merino Wool		0	0	0	0	0	
73137693 - Merino Wool		0	0	0	0	0	
77316938 - Angled Front		0	0	0	0	0	
78498351 - Angled Front		0	1	0	0	-1	
New0000001		0	0	0	0	0	
Missy Long Sleeve		0	0	0	0	0	
50552500 - Extra Long		0	0	0	0	0	
Missy Short Sleeve		0	0	0	0	0	
50334589 - Short Sleeve		0	0	0	0	0	

Figure 3–23 All Exceptions Resolved Message

Creating and Opening Exceptions in Workspace

When you interact with the dashboard, you see summary information detailing the status of the data for which you are responsible. The dashboard provides access to all of the data visible to you and provides a set of filter controls you can use to limit the scope of reporting to a meaningful portion of that data (for example, a single department or class).

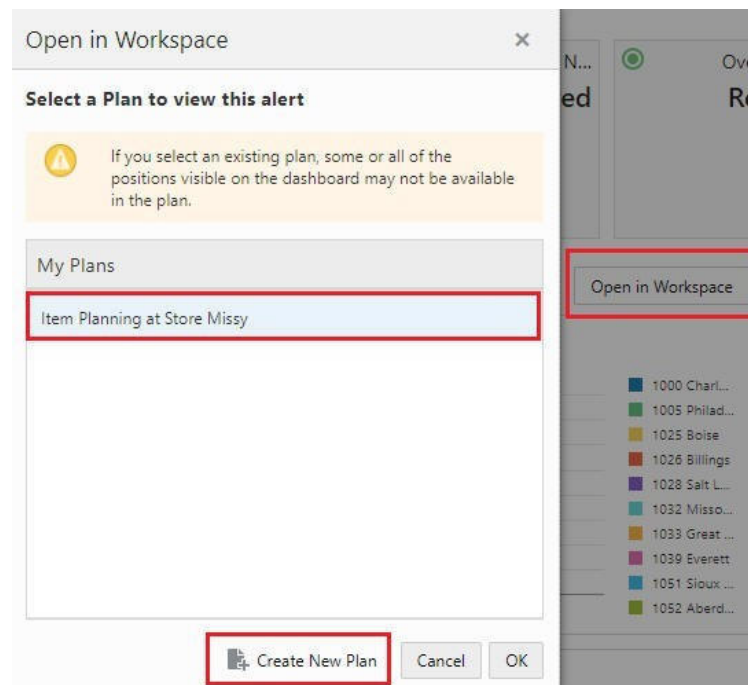
When examining the metrics and exception counts in the dashboard, you can resolve issues or adapt your plans to actual results by launching a taskflow workspace that is associated with an exception displayed in the dashboard.

You can do one of the following actions:

- Open a pre-built segment workspace.

You can launch a segment workspace that has already been built with the selected alert. The workspace focuses on data from the positions selected in dashboard filters.

Click **Open in Workspace** to access the dialog box. Select the plan in which you want to view the alert and then click **OK**. The workspace opens in alert navigation mode. If you select a plan that is missing some or all of the positions selected in the dashboard filters, you see a warning snackbar.

Figure 3–24 Create or Open Workspace

- Create a new segment workspace.

You can define a new segment workspace to work with. The new segment is built with the positions selected in the dashboard filters. The workspace then opens with the selected alert.

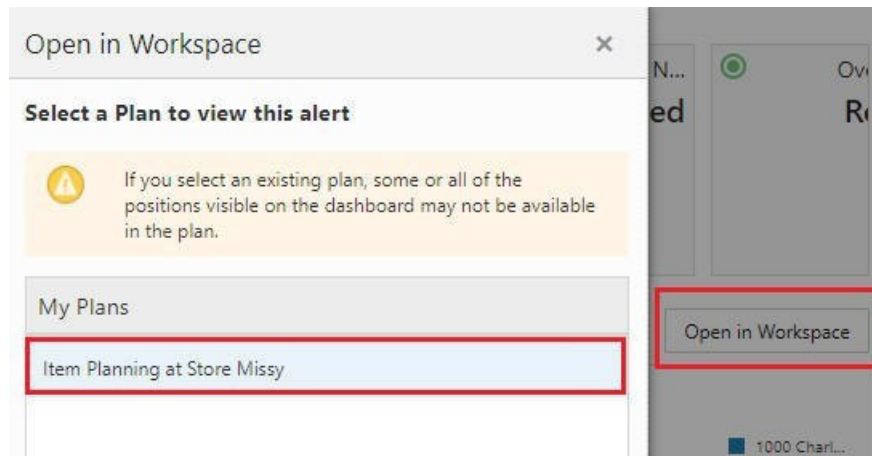
Click **Open in Workspace** to access the dialog box. Click **Create New Plan** and complete the process to create the segment while verifying the selections. When no calendar dimension is supported, you can select from an available pre-range mask to filter only the calendar positions in the wizard. Once the plan is built, you can open the workspace and resolve the alert in Alert Navigation mode. The workbook opens in Alert Navigation mode.

See [Chapter 14](#) for more information on alert navigation.

If you use contextual action on Main chart for these actions, then the positions displayed in the workspace will be based on the area focused on when you right click on the chart. The selection in the dashboard filters is overridden. For example,

- If you right click on the first donut chart, that product will override the selection in the product filter.
- If you right click on a location bar in the top charts, the selected product and location will override the selection in the filters.
- If you right click on the background of the top chart, the product will override the selection in the product filter.
- If you right click on a bar on the last or overview chart, the selected product and location will override the selection in the filters.

Figure 3–25 *Create and Open in Workspace (Contextual Action)*



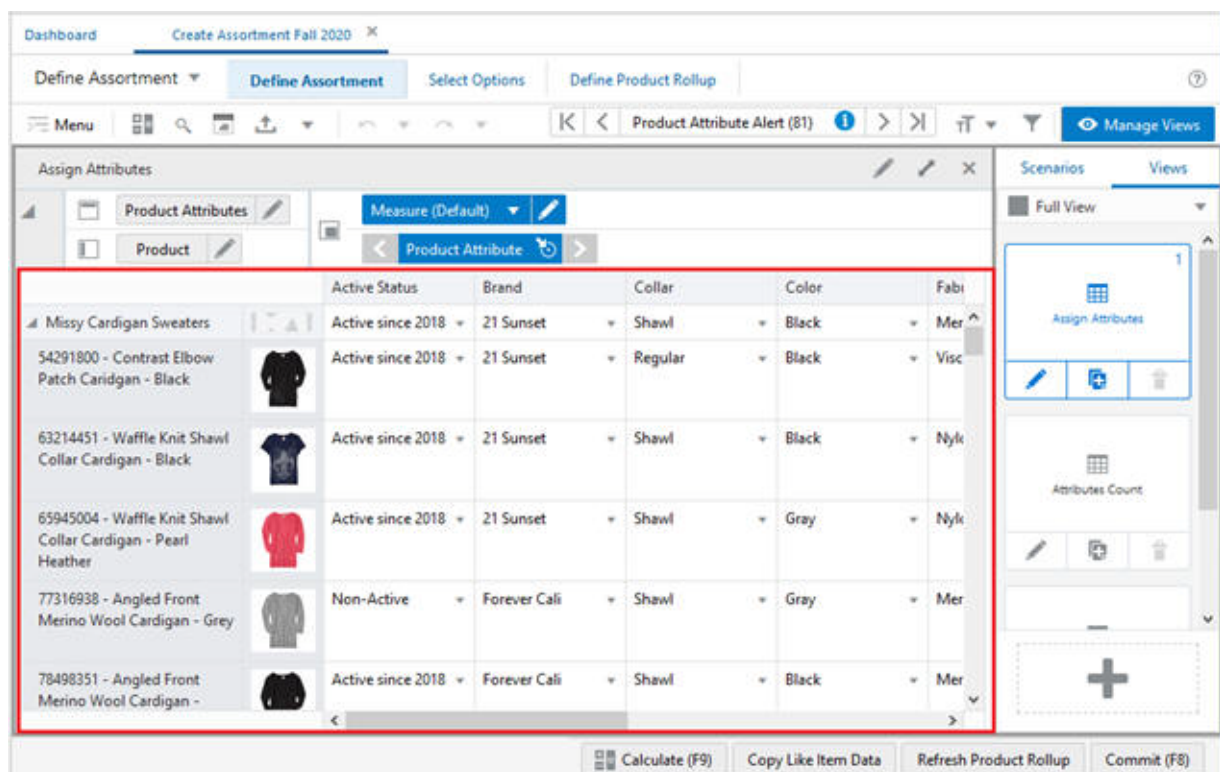
Workspaces

When you use an RPAS CE 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 RPAS CE 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



	Active Status	Brand	Collar	Color	Fabric
Missy Cardigan Sweaters	Active since 2018	21 Sunset	Shawl	Black	Merino
54291800 - Contrast Elbow Patch Cardigan - Black	Active since 2018	21 Sunset	Regular	Black	Viscose
63214451 - Waffle Knit Shawl Collar Cardigan - Black	Active since 2018	21 Sunset	Shawl	Black	Nylon
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather	Active since 2018	21 Sunset	Shawl	Gray	Nylon
77316938 - Angled Front Merino Wool Cardigan - Grey	Non-Active	Forever Cali	Shawl	Gray	Merino
78498351 - Angled Front Merino Wool Cardigan - Black	Active since 2018	Forever Cali	Shawl	Black	Merino

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.

You can also sort by right clicking the required column header and selecting the option Sort Ascending or Sort Descending from the contextual menu.

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.

To sort by the column heading, use the mouse pointer to hover 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

	Seed	Last Seeded	Sales R ▼	Sales U
Missy Long Sleeve Sweaters	▼	Last Assortment ▼	69,600	489
Missy Cold Shoulder Sweaters	▼	Last Assortment ▼	52,407	721
Missy Cardigan Sweaters	▼	Last Assortment ▼	40,101	329
Missy Off The Shoulder	▼	Last Assortment ▼	21,907	296
Missy Sleeveless Sweaters	▼	Last Assortment ▼	10,207	88
Missy Short Sleeve Sweaters	▼	Last Assortment ▼	2,911	21
Missy Sleeveless	▼	▼	0	0
Missy Short Sleeve	▼	▼	0	0
Missy Off The Shoulder	▼	▼	0	0
Missy Long Sleeve	▼	▼	0	0
Missy Cold Shoulder	▼	▼	0	0

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

	Fcst Sales U	Selling Weeks	Base Unit Price 
▲ Missy Off The Shoulder	0	<input type="checkbox"/>	72.50
Off The Shoulder Top	0	<input type="checkbox"/>	65.00
Wilson Stripe Off The	0	<input type="checkbox"/>	80.00
▲ Missy Cold Shoulder	5	<input checked="" type="checkbox"/>	83.33
Cold Shoulder Zip	2	<input checked="" type="checkbox"/>	75.00
Cold Shoulder Zip	3	<input checked="" type="checkbox"/>	75.00
Cold Shoulder Cable Knit	0	<input checked="" type="checkbox"/>	100.00
▲ Missy Off The Shoulder	7	<input checked="" type="checkbox"/>	85.00
Ribbed Off The Shoulder	7	<input checked="" type="checkbox"/>	85.00
Ribbed Off The Shoulder	0	<input checked="" type="checkbox"/>	85.00
Ribbed Off The Shoulder	0	<input type="checkbox"/>	85.00

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

	Fcst Sales U	Selling Weeks	Base Unit Price 
▲ Missy Short Sleeve	0	<input type="checkbox"/>	190.00
Mixed Media Stripe Shirt	0	<input type="checkbox"/>	230.00
Abstract Print Silk Top	0	<input type="checkbox"/>	170.00
Mixed Media Twist Front	0	<input type="checkbox"/>	170.00
▲ Missy Sleeveless	1	<input type="checkbox"/>	141.67
Boat Neck Silk Top	0	<input type="checkbox"/>	220.00
Boat Neck Silk Top	0	<input type="checkbox"/>	140.00
Kent Metallic Foil Print	1	<input type="checkbox"/>	65.00
▲ Missy Short Sleeve	0	<input checked="" type="checkbox"/>	135.00
Elbow Sleeve Wool Tunic	0	<input checked="" type="checkbox"/>	140.00
Short Sleeve Sweater	0	<input checked="" type="checkbox"/>	130.00

Clear Sort

Right click any column header and select Clear Sort from the contextual menu. Clear Sort removes the simple sort in effect, which reverts all the columns to the attribute/label/default position sort ordering, as defined via Edit View.

Figure 4–5 Before Clear Sort

	Seed	Last Seeded	Sales R	
Missy Long Sleeve Sweaters	▼	Last Assortment ▼	16,463	Resize Height/Width
Missy Cold Shoulder Sweaters	▼	Last Assortment ▼	10,352	Format
Missy Cardigan Sweaters	▼	Last Assortment ▼	4,066	Measure Information
Missy Off The Shoulder	▼	Last Assortment ▼	1,787	Hide Selected Measures
Missy Sleeveless Sweaters	▼	Last Assortment ▼	1,298	Lock Selected Columns
Missy Short Sleeve Sweaters	▼	Last Assortment ▼	572	Unlock Selected Columns
Missy Sleeveless	▼	▼	0	Unlock All Measures
Missy Short Sleeve	▼	▼	0	Manage Attributes
Missy Off The Shoulder	▼	▼	0	Show Attributes
Missy Long Sleeve	▼	▼	0	Sort Ascending
Missy Cold Shoulder	▼	▼	0	Sort Descending
Missy 3/4 Sleeve	▼	▼	0	Clear Sort

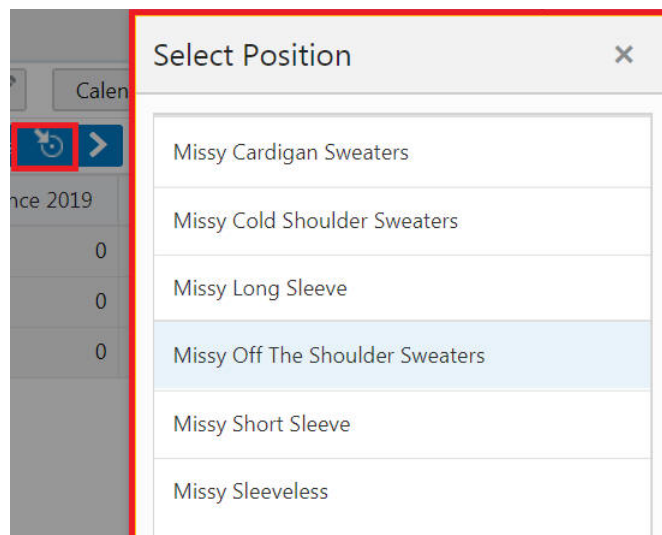
Figure 4–6 After Clear Sort

	Seed	Last Seeded	Sales R
Missy 3/4 Sleeve	▼	▼	0
Missy Cardigan Sweaters	▼	Last Assortment ▼	4,066
Missy Cold Shoulder	▼	▼	0
Missy Cold Shoulder Sweaters	▼	Last Assortment ▼	10,352
Missy Long Sleeve	▼	▼	0
Missy Long Sleeve Sweaters	▼	Last Assortment ▼	16,463
Missy Off The Shoulder	▼	▼	0
Missy Off The Shoulder	▼	Last Assortment ▼	1,787
Missy Short Sleeve	▼	▼	0
Missy Short Sleeve Sweaters	▼	Last Assortment ▼	572
Missy Sleeveless	▼	▼	0
Missy Sleeveless Sweaters	▼	Last Assortment ▼	1,298

Selecting a Position

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

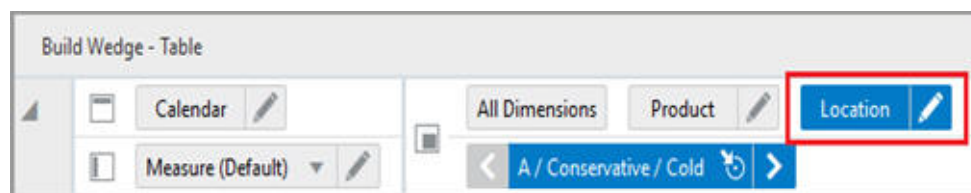
Click the dimension tile you want to be active for the Select Position action. In this example, you can choose from Location or Product. Whichever dimension is selected, Select Position will open for that dimension.

Figure 4–7 Active Dimension (Product)

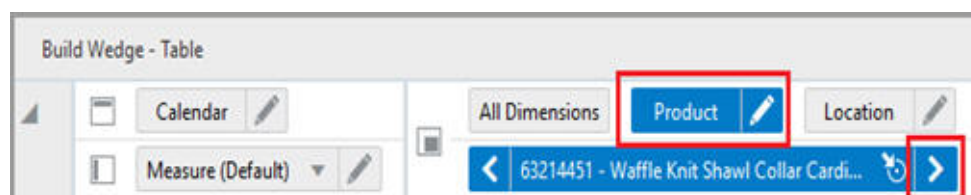
Using the Z Axis

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

Figure 4–8 Location (Active Dimension) on Z Axis

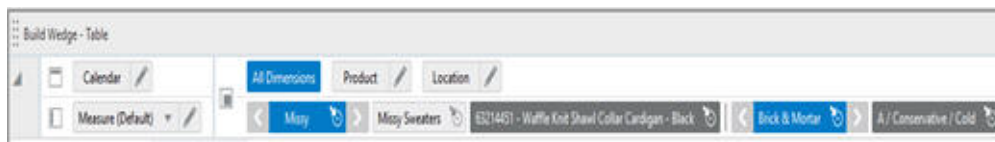
Select the dimension that you want to make active and scroll through that dimension only. In the example shown in [Figure 4–9](#), the Product dimension is selected to make it active; the current product position is displayed. Click **Next** to advance to the next product; the location position will not change.

Figure 4–9 Select Product on Z Axis

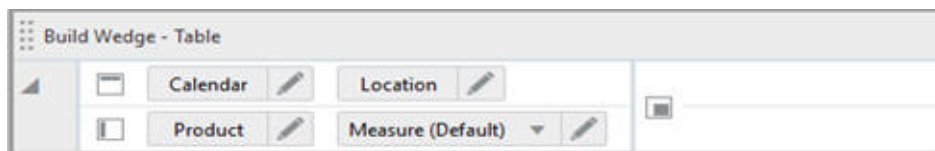
When you open a workspace, the All Dimensions button is selected by default, as shown in [Figure 4–10](#).

Figure 4–10 All Dimensions Active

If you select multiple levels of the dimension, all the selected levels for all the dimensions on the z axis will be visible, as shown in [Figure 4–11](#). You can differentiate the lowest level tile for each dimension.

Figure 4–11 All Dimensions Active: Multiple Levels Selected

If you select any other dimension of the z axis, the All Dimensions button becomes unselected. If there are no dimensions or only one dimension on the z axis, then the All Dimensions button will not be visible, as shown in [Figure 4–12](#).

Figure 4–12 No Dimensions on Z Axis: All Dimensions Button Not Visible

If you move between steps in the workspace, the All Dimension selection for that view will persist for the current session. If you select All Dimension in one view when Synchronize Z Axis is on, then it will be selected in all the views in the workspace.

Using 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:

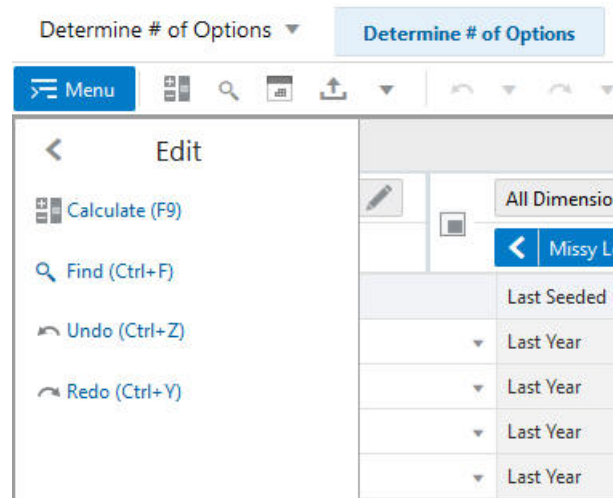
- The Find option in the Edit sub-menu of the Quick Access Toolbar menu
- The shortcut Ctrl + F from a selected pivot table cell
- The Find button on the Quick Access Toolbar

Using Find via the Quick Access Toolbar Menu

To use Find via the Quick Access Toolbar menu:

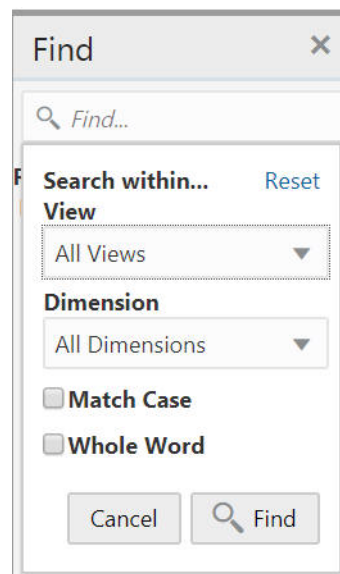
1. Click **Menu** to slide in the Main Menu.
2. Click **Edit**.
3. Click **Find**.

Figure 4–13 Using Find Via the Quick Access Toolbar Menu



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

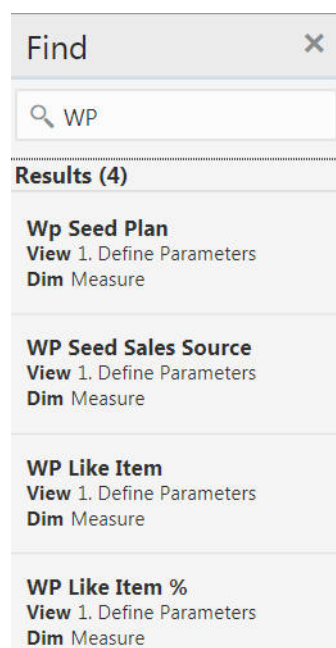
Figure 4–14 Find Panel



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 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 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 4–15 Find Results



9. The menu closes 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 are 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.

Note that when the focus moves from the Find panel to the grid after a reset, the Find pop-up will close but the Find panel is still displayed on the left.

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."](#)

Measure Information

You can right click a measure and select Measure Information from the context menu. This provides more information on the selected measure that can help you understand its use and context in the open workspace.

Figure 4–16 Open Measure Information

	Seed	Last Seeded	Sales R	Sales U	Sa
Missy 3/4 Sleeve	▼	▼		Resize Height/Width	
Missy Cardigan Sweaters	▼	Last Assortment ▼	4,0	Format	
Missy Cold Shoulder	▼	▼		Measure Information	
Missy Cold Shoulder Sweaters	▼	Last Assortment ▼	10,3	Hide Selected Measures	
Missy Long Sleeve	▼	▼		Lock Selected Columns	
Missy Long Sleeve Sweaters	▼	Last Assortment ▼	16,4	Unlock Selected Columns	
Missy Off The Shoulder	▼	▼		Unlock All Measures	
Missy Off The Shoulder	▼	Last Assortment ▼	1,7	Manage Attributes	
Missy Short Sleeve	▼	▼		Show Attributes	
Missy Short Sleeve Sweaters	▼	Last Assortment ▼	5	Sort Ascending	
Missy Sleeveless	▼	▼		Sort Descending	
Missy Sleeveless Sweaters	▼	Last Assortment ▼	1,2	Clear Sort	

A Measure Information dialog box opens as shown below that displays Measure Name, Data Type, Default Spread Type, Intersection, Lower and Upper Bound, Default Aggregation Type and Description.

Figure 4–17 Measure Information

Measure Information	
Measure	Default Spread Type
Sales R	ratio
Data Type	Intersection
Real	Store Cluster Sub-Class Assortment Period
Lower Bound	Upper Bound
-1.7976931348623E308	1.7976931348623E308
Default Aggregation Type	
total	
Description	
Create Assortment Working Plan Sales Retail	

Hiding Selected Measures

Using the context menu shortcut, Hide Selected Measures, you can hide the metrics you do not want to work with currently. This saves you from opening Measure Edit View and selecting the measures to hide from the list.

Figure 4–18 Hide Selected Measures

	GM R %	LY Markdown R %	LA Markdown R %	LY ROS	LA ROS	ROS	WP Total Options
Missy 3/4 Sleeve	0.0%	0.0%	0.0%	0.00	<div> <div>Resize Height/Width</div> <div>Format</div> <div>Measure Information</div> <div>Hide Selected Measures</div> <div>Lock Selected Columns</div> <div>Unlock Selected Columns</div> <div>Unlock All Measures</div> <div>Manage Attributes</div> <div>Show Attributes</div> <div>Clear Sort</div> </div>	0.00	0
Missy Cardigan Sweaters	58.0%	9.0%	0.0%	0.00		0.43	6
Missy Cold Shoulder	0.0%	0.0%	0.0%	0.00		0.00	0
Missy Cold Shoulder Sweaters	58.0%	13.9%	0.0%	0.00		2.74	4
Missy Long Sleeve	0.0%	5.0%	0.0%	0.69		0.00	0
Missy Long Sleeve Sweaters	57.2%	9.0%	0.0%	0.00		1.25	7
Missy Off The Shoulder	0.0%	0.0%	0.0%	0.00		0.00	0
Missy Off The Shoulder	48.6%	12.3%	0.0%	0.00		0.65	3
Missy Short Sleeve	0.0%	53.8%	0.0%	0.00		0.00	0
Missy Short Sleeve Sweaters	57.9%	0.0%	0.0%	0.00		0.16	2
Missy Sleeveless	0.0%	3.0%	0.0%	0.00		0.00	0
Missy Sleeveless Sweaters	57.1%	8.6%	0.0%	0.00		0.22	4

You can see all the measures in the view by selecting the measure profile from the Measure Edit View once you have completed the work.

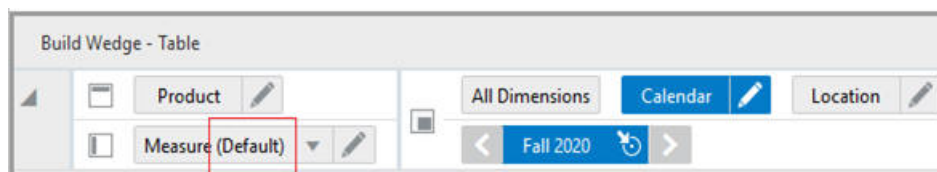
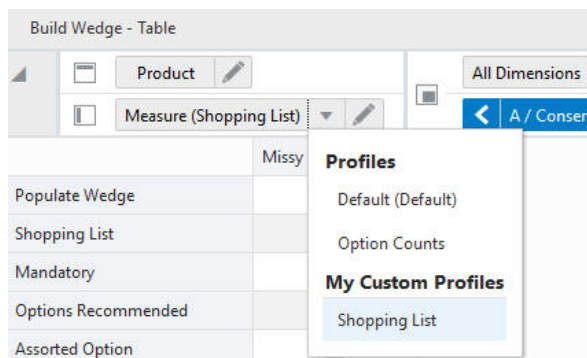
Figure 4–19 Un-Hide Selected Measures

	Sales AUR	GM R	GM R %	LY Markdown R %	LA Markdown R %	ROS	WP Total Options
Missy 3/4 Sleeve	0.00	0	0.0%	0.0%	0.0%	0.00	0
Missy Cardigan Sweaters	120.88	2,357	58.0%	9.0%	0.0%	0.43	6
Missy Cold Shoulder	0.00	0	0.0%	0.0%	0.0%	0.00	0
Missy Cold Shoulder Sweaters	72.55	6,001	58.0%	13.9%	0.0%	2.74	4
Missy Long Sleeve	0.00	0	0.0%	5.0%	0.0%	0.00	0
Missy Long Sleeve Sweaters	145.28	9,415	57.2%	9.0%	0.0%	1.25	7
Missy Off The Shoulder	0.00	0	0.0%	0.0%	0.0%	0.00	0
Missy Off The Shoulder	70.65	869	48.6%	12.3%	0.0%	0.65	3
Missy Short Sleeve	0.00	0	0.0%	53.8%	0.0%	0.00	0
Missy Short Sleeve Sweaters	136.07	331	57.9%	0.0%	0.0%	0.16	2
Missy Sleeveless	0.00	0	0.0%	3.0%	0.0%	0.00	0
Missy Sleeveless Sweaters	115.94	741	57.1%	8.6%	0.0%	0.22	4

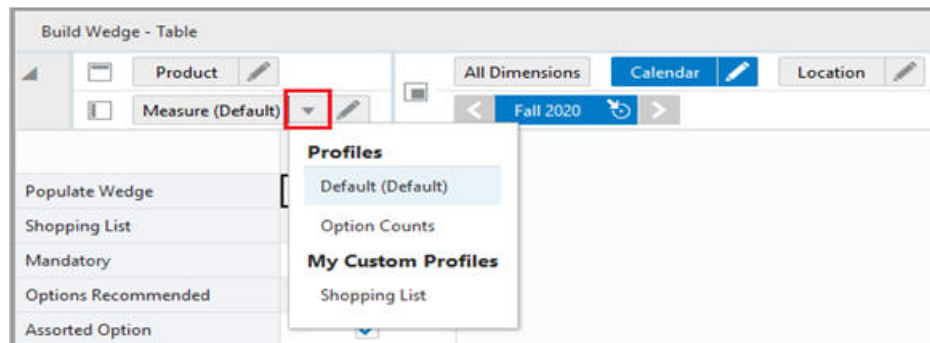
Switching Between Measure Profiles

Measure profiles are customized groups of measures that you can create and use in views. See ["Measure Profiles"](#) for details about measure profiles.

You can see the current measure profile on the Measure dimension tile on the pivot table, as shown in [Figure 4–20](#).

Figure 4–20 Current Measure Profile**Figure 4–21 Selected Measure Profile Displayed on Measure Tile**

To switch between measure profiles, select the required measure profile from the list of Measure dimension tile, as shown in [Figure 4–22](#). When you select a measure profile from the list, the view refreshes to show the measures of the selected measure profile. The selected measure profile is shown on the tile as well highlighted in the list.

Figure 4–22 Select Measure Profile

Selecting Rows and Columns

Selecting an entire row or column or multiple rows or columns is required for using several features such as Hide Selected Measures, Lock and Unlock, and so on.

Selecting a Single Row or Column

To select a single row or column, click the row or column header. When selected, the row or column becomes shaded.

Figure 4–23 Select Single Row

	Sales R	Sales U	Sales AUR
Missy Cardigan Sweaters	4,066	34	120.88
Missy Cold Shoulder Sweaters	10,352	143	72.55
Missy Long Sleeve Sweaters	16,463	113	145.28
Missy Off The Shoulder	1,787	25	70.65
Missy Short Sleeve Sweaters	572	4	136.07
Missy Sleeveless Sweaters	1,298	11	115.94

Selecting a Group of Contiguous Rows or Columns

To select a group of contiguous rows or columns, do one of the following:

- Double click the first row or column header to be selected and then drag the mouse pointer along the row or column headers to select the remaining rows or columns.
- Select a row or column header and then use Shift Key + Down/Up Arrow Key to select multiple contiguous rows or columns.

The selected row or columns become shaded.

Figure 4–24 Select a Group of Contiguous Rows or Columns

	Sales R	Sales U	Sales AUR	GM R	GM R %
Missy Cardigan Sweaters	4,066	34	120.88	2,357	58.0%
Missy Cold Shoulder Sweaters	10,352	143	72.55	6,001	58.0%
Missy Long Sleeve Sweaters	16,463	113	145.28	9,415	57.2%
Missy Off The Shoulder	1,787	25	70.65	869	48.6%
Missy Short Sleeve Sweaters	572	4	136.07	331	57.9%
Missy Sleeveless Sweaters	1,298	11	115.94	741	57.1%

Selecting a Group of Non-Contiguous Rows or Columns

To select a group of non-contiguous rows or columns:

1. Click the first row or column header you want to select. The selected row or column becomes shaded.
2. Hold down the Ctrl key and click the other row or column headers you want to select.

All the selected rows or columns become shaded.

Figure 4–25 Select a Group of Non-Contiguous Rows or Columns

	Sales R	Sales U	Sales AUR	GM R	GM R %
Missy Cardigan Sweaters	4,066	34	120.88	2,357	58.0%
Missy Cold Shoulder Sweaters	10,352	143	72.55	6,001	58.0%
Missy Long Sleeve Sweaters	16,463	113	145.28	9,415	57.2%
Missy Off The Shoulder	1,787	25	70.65	869	48.6%
Missy Short Sleeve Sweaters	572	4	136.07	331	57.9%
Missy Sleeveless Sweaters	1,298	11	115.94	741	57.1%

Resizing Rows and Columns

You can quickly resize multiple columns or rows to view the relevant information on the column or row header. You can resize by adjusting the height or width of headers for multiple cells. You can select one or more column or row headers and take contextual action to resize the width/height.

Figure 4–26 Select Rows to Resize

	Retail Price	Cost	IMU %
Missy Cardigan Sweaters	151.25	62.01	59.0%
54291800 - Contrast	130.00	53.59	58.8%
63214451 - Waffle Knit	100.00	37.88	62.1%
65945004 - Waffle Knit	100.00	41.98	58.0%
70063172 - Merino Wool	160.00	67.12	58.1%
72939751 - Merino Wool	160.00	67.12	58.1%
73137693 - Merino Wool	67.12	67.12	58.1%
77316938 - Angled Front	80.65	80.65	59.7%
78498351 - Angled Front	80.65	80.65	59.7%

Table 4-1 Resizing Rows and Columns

Value	Width	Height
Minimum Value	13 px	11 px
Maximum Value	512 px	364 px

If the values entered for width or height are outside these thresholds, then an error message is displayed and the OK button is disabled. You must enter the correct value or leave it blank (the default value) and then click OK.

Figure 4-27 Resize Height or Width

You can restore the selected row or column headers to the default size by clicking the Restore Default option as required. If Restore Default is below the Height or Width, then the default text is displayed.

Figure 4-28 Resizing Results

	Retail Price	Cost	IMU %
Missy Cardigan Sweaters	151.25	62.01	59.0%
54291800 - Contrast Elbow Patch Cardigan - Black	130.00	53.59	58.8%
63214451 - Waffle Knit Shawl Collar Cardigan - Black	100.00	37.88	62.1%
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather	100.00	41.98	58.0%
70063172 - Merino Wool Flutter Cardigan - Black	160.00	67.12	58.1%
72939751 - Merino Wool Flutter Cardigan - China Red	160.00	67.12	58.1%
73137693 - Merino Wool Flutter	160.00	67.12	58.1%
77316938 - Angled Front Merino Wool	200.00	80.65	59.7%
78498351 - Angled Front Merino Wool	200.00	80.65	59.7%

Expanding and Collapsing Levels in Rows and Columns

You can quickly collapse or expand the levels in columns or rows to see data in a way that is most meaningful to you, and is easy to navigate to. This allows you to work at summary levels and drill-down to see data at the lower levels. This is useful, for example, when the planner reviews monthly KPIs based on LY but must manipulate the weeks of a promotion-2 weeks.

You can right click a column or row dimension level to expand or collapse every column of every level using Expand All or Collapse All.

You can right click a column or row dimension level to expand or collapse that position and all levels below that position only using Expand or Collapse.

You can select more than one column or row dimension level (column or row independently, not simultaneously) and right click to expand those positions and all levels below that position only.

Note: Expand or Collapse of levels done in the Edit View Overlay will not change the expanded or collapsed levels in the pivot table.

Showing and Hiding Attributes

You can show or hide the attributes in the pivot table in the row or column headers. Right click any row or column header and select Show Attributes from the contextual menu.

Figure 4-29 Show Attributes

	Expand All	Cost	IMU %
Missy Cardigan Sweaters	Collapse All	62.01	59.0%
54291800 - Contrast	Lock Selected Rows	53.59	58.8%
63214451 - Waffle Knit	Unlock Selected Rows	37.88	62.1%
65945004 - Waffle Knit	Unlock All Positions	41.98	58.0%
70063172 - Merino Wool	Manage Attributes	67.12	58.1%
72939751 - Merino Wool	Show Images	67.12	58.1%
73137693 - Merino Wool	Show Attributes	67.12	58.1%
77316938 - Angled Front		80.65	59.7%
78498351 - Angled Front	200.00	80.65	59.7%

This displays the Attribute: Attribute Value list in the row or column header.

Figure 4–30 Attribute List Visible in the Row Header

			Retail Price	Cost	IMU %
54291800 - Contrast Elbow Patch Cardigan - Black	Brand: 21 Sunset Wedge Card Attribute: Collar: Regular Color: Black Fabric: Viscose Nylon Like Option: Neckline: Boat Neck Pattern: Solid SL Card Attribute: Active Status: Active since 2018		130.00	53.59	58.8%
63214451 - Waffle Knit Shawl Collar Cardigan - Black	Brand: 21 Sunset Wedge Card Attribute: Collar: Shawl Color: Black Fabric: Nylon Wool Like Option: Neckline: Round Neck Pattern: Solid SL Card Attribute: Active Status: Active since 2018		100.00	37.88	62.1%
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather	Brand: 21 Sunset Wedge Card Attribute: Collar: Shawl Color: Gray		100.00	41.98	58.0%

To hide the attributes list, use Hide Attributes from the contextual menu.

Figure 4–31 Hide Attributes

			Expand	Cost	IMU %
54291800 - Contrast Elbow Patch Cardigan - Black	Brand: 21 Sunset Wedge Card Attribute: Collar: Regular Color: Black Fabric: Viscose Nylon Like Option: Neckline: Boat Neck Pattern: Solid SL Card Attribute: Active Status: Active since 2018		Collapse	53.59	58.8%
			Expand All		
			Collapse All		
			Lock Selected Rows		
			Unlock Selected Rows		
63214451 - Waffle Knit Shawl Collar Cardigan - Black	Brand: 21 Sunset Wedge Card Attribute: Collar: Shawl Color: Black Fabric: Nylon Wool Like Option: Neckline: Round Neck Pattern: Solid SL Card Attribute: Active Status: Active since 2018		Unlock All Positions	37.88	62.1%
			Manage Attributes		
			Show Images		
			Hide Attributes		

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 RPAS CE 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.

Selecting and Manipulating 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.

Selecting 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.

Selecting 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 4–32 *Select a Group of Contiguous Cells*

	Seed	Last Seeded	Sales R	Sales U	Sales AUR
Missy Long Sleeve Sweaters	▼	Last Assortment	69,600	489	142.37
Missy Cold Shoulder Sweaters	▼	Last Assortment	52,407	721	72.73
Missy Cardigan Sweaters	▼	Last Assortment	40,101	329	122.01
Missy Off The Shoulder	▼	Last Assortment	21,907	296	74.06
Missy Sleeveless Sweaters	▼	Last Assortment	10,207	88	116.24
Missy Short Sleeve Sweaters	▼	Last Assortment	2,911	21	136.11
Missy Sleeveless	▼	-	0	0	0.00
Missy Short Sleeve	▼	-	0	0	0.00

Selecting 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 4–33 Select a Group of Non-Contiguous Cells

	Sales R ▼	Sales U	Sales AUR	GM R	GM R %
Missy Long Sleeve Sweaters	69,600	489	142.37	40,085	57.6%
Missy Cold Shoulder Sweaters	52,407	721	72.73	30,438	58.1%
Missy Cardigan Sweaters	40,101	329	122.01	23,300	58.1%
Missy Off The Shoulder	21,907	296	74.06	11,170	51.0%
Missy Sleeveless Sweaters	10,207	88	116.24	5,819	57.0%
Missy Short Sleeve Sweaters	2,911	21	136.11	1,686	57.9%

Navigation Shortcuts for Editing Cells

When you are editing cells in a pivot view, you can use the navigation options listed in [Table 4–2](#) to move to the next cell.

Table 4–2 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 Esc (Escape) key to exit Editable mode and restore the previous value.

Entering or Changing 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.

List Items

You can select the desired option from the list. Two types of lists are available.

- Use a standard list by clicking the arrow to expand the list and select an item.
- A list that lists positions from a hierarchy is often quite long. This type of list provides a search field at the top of list. The search field filters the long list to list items matching the search text. To make a selection, click the arrow to expand the list and search for or select an item. To modify a selection, click the arrow to expand the list, then click **X** to clear the search field in order to enter new search criteria.

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 4–34 Edit Cell Values

	Use Net Sales for #	Last Seeded	GM R var LY %	Sales R	Sales U
Missy Cardigan Sweaters	<input type="checkbox"/>	Last Assortment ▾	12.6%	4,066	34
Missy Cold Shoulder Sweaters	<input checked="" type="checkbox"/>	Last Assortment ▾	748.6%	10	143
Missy Long Sleeve Sweaters	<input type="checkbox"/>	Last Assortment ▾	80.1%	16,463	113
Missy Off The Shoulder Sweaters	<input type="checkbox"/>	Last Assortment ▾	18.4%	1,787	25
Missy Short Sleeve Sweaters	<input type="checkbox"/>	Last Assortment ▾	0.0%	572	4
Missy Sleeveless Sweaters	<input type="checkbox"/>	Last Assortment ▾	84.9%	1,298	11

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 ["Modifying Data with Cell Formulas"](#).

Modifying 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 left to right.

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 data that has been entered. 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 RPAS CE Configuration Tools or through the formatting options in RPAS CE. 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 RPAS CE, complete the following steps:

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

Figure 4–35 Formatting Measure Data

	Fcst Sales U	Base Unit Price R	WP Event
Missy 3/4 Sleeve	0		
96880516 - Sheer Hem	0		
99087419 - V-Neck Silk	0		
Missy Cardigan Sweaters	40		
65945004 - Waffle Knit	0		
70063172 - Merino Wool	0		
72939751 - Merino Wool	0		
73137693 - Merino Wool	0		
77316938 - Angled Front	0		
78498351 - Angled Front	0		
New0000001	0		

2. The Format window is displayed.
3. In Figure 4–35, the selected measure Base Unit Price R is already selected and all the views in the current tab are selected.

Figure 4–36 Format for Measure Base Unit Price R

Format

Apply to Measure

Visible in...

Search for Measures...

☐

☐

☐

☒ Base Unit Price R

☐ Fcst Sales U

☐ Retail Price

☐ Selling Weeks

1 selected

Show Selected

Select All

Clear

Apply to Views

Sales & Margin

Current Selection

Measures: Base Unit Price R

Views: 1. Plan Sales & Margin, 3. What-If Plan, 2. What-If Price Point Setup

Basic Formatting

Cell Format

Text Format

Quick Format

Prefix

Suffix

Scale

Decimal Places

Show Separator

Preview

Read-Only

Header

1234k

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 4–37 Scale Factor Values

	Fcst Sales U	Selling Weeks	Base Unit Price R▼
▲ Missy Short Sleeve	0	<input type="checkbox"/>	190k
Mixed Media Stripe Shirt	0	<input type="checkbox"/>	230k
Abstract Print Silk Top	0	<input type="checkbox"/>	170k
Mixed Media Twist Front	0	<input type="checkbox"/>	170k
▲ Missy Sleeveless	1	<input type="checkbox"/>	142k
Boat Neck Silk Top	0	<input type="checkbox"/>	220k
Boat Neck Silk Top	0	<input type="checkbox"/>	140k
Kent Metallic Foil Print	1	<input type="checkbox"/>	65k
▲ Missy Short Sleeve	0	<input checked="" type="checkbox"/>	135k
Elbow Sleeve Wool Tunic	0	<input checked="" type="checkbox"/>	140k

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.

Using the Fill Function in a View

You can populate many cells of a writable measure at a time by using the Fill function. This enables you to edit multiple workbook cells with same value easily and quickly.. 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 or to the right from that source cell.
3. Right click one of the selected cells and select **Fill** from the context menu.

Figure 4–38 Fill Cell

	Retail Price	Cost
Missy Cardigan Sweaters	151.25	62.01
54291800 - Contrast Elbow Patch Cardigan -	150.00	53.59
63214451 - Waffle Knit Shawl Collar Cardigan -	100.00	
65945004 - Waffle Knit Shawl Collar Cardigan -	100.00	
70063172 - Merino Wool Flutter Cardigan - Black	160.00	
72939751 - Merino Wool Flutter Cardigan - China	160.00	
73137693 - Merino Wool	160.00	67.12

- Format
- Lock Cells
- Unlock Cells
- Unlock All Cells
- Fill
- Apply Position Filter

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

Figure 4–39 Selected Cells Filled with Source Cell Value

	Retail Price	Cost
Missy Cardigan Sweaters	151.25	62.01
54291800 - Contrast Elbow Patch Cardigan -	150.00	53.59
63214451 - Waffle Knit Shawl Collar Cardigan -	150.00	37.88
65945004 - Waffle Knit Shawl Collar Cardigan -	150.00	41.98
70063172 - Merino Wool Flutter Cardigan - Black	150.00	67.12
72939751 - Merino Wool Flutter Cardigan - China	150.00	67.12
73137693 - Merino Wool	160.00	67.12

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.

Aggregation and Spread Methods

Fundamental to planning is the ability to review and plan at both a high-level and detailed level. You are able to easily do this by showing or hiding levels of any hierarchy (see Editing Views). When multiple hierarchy levels are visible you are able to see both the high-level (parent), and low-level (child) data.

The parent data represents an aggregation of its children. This means that a change to the data at the child level is reflected in the parent (after you calculate). The way in which data is aggregated from child to parent is called the Aggregation Method. There are multiple aggregation methods which are used to produce values at parent level. These methods are described in [Aggregation Methods](#).

Spreading is the opposite of aggregation and works to distribute parent-level modifications to the children.

Various aggregation and spreading methods are provided such as total, average, minimum, maximum. A complete list of aggregation and spreading methods are explained in these sections; [Aggregation Methods](#) and [Spread Methods](#).

Note: A few aggregation methods only consider cells that are populated for calculation. These methods are annotated by **_pop**. For example, the **total_pop** means that the aggregation method total is applied only on the cells which are populated.

The user can find aggregation and spread methods under measure information of each measures. for measure information navigation, refer to [Measures](#).

In [Table 4–3](#), assume the following hierarchy and measure data for understanding the aggregation and spread methods, here six measures and five weeks (Week1, Week2, Week3, Week4, Week5) are shown for one product.

Table 4–3 Hierarchy and Measure Data

Measure	Sales R	Sales U	Sales AUR	Selling Week	BOP	EOP
Month A						
Week 1	3000	190	15.8	X	350	310
Week 2	1550	120	12.9		310	250
Week 3	1850	170	10.9	X	250	170
Week 4	1370	120	11.4	X	170	95
Week 5	2450	195	12.6	X	95	50

Aggregation Methods

Aggregation methods are explained in the following sections.

Total

The measure is aggregated by taking the total (numeric sum) of the values of all child cells at the base intersection.

Example: If Agg method for measure Sales R is total, then the value for Sales R at month A will aggregate as

Wk1 + Wk2 + Wk3 + Wk4 + Wk5 Week1 + Week2 + Week3 + Week4 + Week5

Measure	Sales R
Month A	10220
Week 1	3000
Week 2	1550
Week 3	1850
Week 4	1370
Week 5	2450

Average

The measure is aggregated by taking the numeric average of the values of all the child cells at the base intersection.

Example: Assume the agg method for measure Sales R is average, then the value of Sales R at month A will be aggregated as $(Wk1+Wk2+Wk3+Wk4+Wk5)/5$ (Week1 + Week2 + Week3 + Week4 + Week5) / 5

Measure	Sales R
Month A	2044
Week 1	3000
Week 2	1550
Week 3	1850
Week 4	1370
Week 5	2450

Mode

Picks the most frequently occurring cell value from the base intersection to represent the cell value of the parent level.

Example: Assume the agg method applied for measure Sales U is mode, then results at month A for Sales U will be 120

Measure	Sales U
Month A	120
Week 1	190
Week 2	120
Week 3	170
Week 4	120
Week 5	195

Median

The measure is aggregated as the median value (the middle value when sorted from lowest to highest) of the values of all child cells.

Example: If agg method for measure Sales R is median then the value for Sales R at month A will be 1850

Measure	Sales R
Month A	1850
Week 1	3000
Week 2	1550
Week 3	1850
Week 4	1370

Measure	Sales R
Week 5	2450

Max

The measure is aggregated by taking the maximum of the values of all child cells at the base intersection.

Example: Assume agg method applied for Sales R is max then the value for sales R at month A will be 3000

Measure	Sales R
Month A	3000
Week 1	3000
Week 2	1550
Week 3	1850
Week 4	1370
Week 5	2450

Min

The measure is aggregated by taking the minimum of the values of all child cells at the base intersection.

Note: For most purposes, the **min_pop** is most appropriate because the minimum value of all child values is typically the NA value, which is usually zero.

Example: Assume agg method applied for Sales U is min then the value for Sales U at month A will be 120

Measure	Sales U
Month A	120
Week 1	190
Week 2	120
Week 3	170
Week 4	120
Week 5	195

recalc

The measure is not aggregated, but is recalculated at all aggregated levels. The equation used to calculate a parent value will be unique to the data being calculated.

Example: Assume the recalc method is applied to Sales AUR, the month A value for sales AUR will be defined by the same equation used for calculating the base intersection of Sales AUR.

For each week level $\text{Sales AUR} = \text{Sales R} / \text{Sales U}$. Hence,
at month A level $\text{Sales AUR} = \text{Sales R}$

at month A / Sales U

at month A that is, Sales AUR at month level = $10220/795 = 12.86$

Measure	Sales R	Sales U	Sales AUR
Month A	10220	795	12.86
Week 1	3000	190	15.8
Week 2	1550	120	12.9
Week 3	1850	170	10.9
Week 4	1370	120	11.4
Week 5	2450	195	12.6

ambig

The measure is aggregated by considering the values of all child cells. If all child cells have the same value, the parent value is the same as the child cells. Otherwise, the children are different therefore the parent value is ambiguous. Ambig value is annotated as a question mark (?) symbol.

Example: Assume agg method applied for Sales R is ambig, then at month A of Sales R will be ?.

Measure	Sales R
Month A	?
Week 1	3000
Week 2	1550
Week 3	1850
Week 4	1370
Week 5	2450

popcount

The measure is aggregated by counting the number of child cells that are populated (meaning that they have a value different from the NA value for the measure). This is frequently used for Alert (hit count) measures.

Example: Assume agg method for measure Selling week is popcount, then the value at month A will be four (count of selected check box).

Measure	Selling Week
Month A	4
Week 1	X
Week 2	
Week 3	X
Week 4	X
Week 5	X

pst (Period Start Total)

The measure is aggregated by selecting the first child value in the Calendar hierarchy and by taking the total of all child values in all other hierarchies.

For example: if aggregating from week to month the value in the first week of the month becomes the month-level value. Similarly, to aggregate from Month to Quarter will take the value from the first month of the quarter and place it in the Quarter.

Example: Assume agg method for measure BOP is pst, the value of BOP at month A will be same as first week value.

Measure	BOP
Month A	350
Week 1	350
Week 2	310
Week 3	250
Week 4	170
Week 5	95

pet (Period End Total)

The measure is aggregated by selecting the last child value in the Calendar hierarchy, and by taking the total of all child values for all other hierarchies.

For example: if aggregating from week to month the value in the last week of the month becomes the month-level value. Similarly, to aggregate from Month to Quarter will take the value from the last month of the quarter and place it in the Quarter.

Example: Assume agg method for measure EOP is pet, the value for EOP at month A will be the same as last week value.

Measure	EOP
Month A	50
Week 1	310
Week 2	250
Week 3	170
Week 4	95
Week 5	50

and

The measure is aggregated by performing a Boolean And operation on the values of all child cells. This means that if all children are True then the parent is True. Otherwise, the parent is False.

(child 1=True, and child 2=True, and...and child n=True) then True.

Example: Assume the agg method for selling week is and then value for selling week at month A is unchecked (false) considering all the child cells are not checked.

Measure	Selling Week
Month A	
Week 1	X
Week 2	
Week 3	X
Week 4	X
Week 5	X

or

The measure is aggregated by performing a Boolean Or operation on the values of all child cells. This means that if any of the children are True then the parent is True. Otherwise the parent is False.

(child 1=True, or child 2=True, or...or child n=True) then True.

Example: Assume the agg method for selling week is or then the value for selling week at month A is checked.

Measure	Selling Week
Month A	X
Week 1	X
Week 2	
Week 3	X
Week 4	X
Week 5	X

hybrid

The measure is aggregated using a specific aggregation method for each hierarchy. The method applied to each will be unique to the data being aggregated.

Spread Methods

Spread methods are explained in the following sections.

none

Values cannot logically be spread to the child.

Example: Here the Sales AUR is example for spread type none, since this cannot be logically spread.

repl

Replicate the value to each child.

Example: Assume spread method for Sales U is repl, then the value for Sales U at Month A will be replicated to all the Weeks intersection.

Measure	Sales U
Month A	500
Week 1	500
Week 2	500
Week 3	500
Week 4	500
Week 5	500

prop

Spreads values evenly. This means the parent value is distributed to all child cells evenly as shown in the following example.

Example: Assume spread method for Sales U is prop, the value of the sales U at month A will be spread proportionally to all the weeks.

If Sales U at month A is updated from 795 to 1000 then:

Measure	Sales U		Measure	Sales U
Month A	795	Updated To	Month A	1000
Week 1	190		Week 1	239
Week 2	120		Week 2	151
Week 3	170		Week 3	214
Week 4	120		Week 4	151
Week 5	195		Week 5	245

even

Spreads values evenly. This means the parent value is distributed to all child cells evenly as shown in the following example.

Example: Assume spread method for Sales R is even, then the value of Sales R at Month A will be spread evenly to all the weeks.

If Sales R at Month A = 10,000 then:

Measure	Sales U
Month A	10000
Week 1	2000
Week 2	2000
Week 3	2000
Week 4	2000
Week 5	2000

delta

Increments or decrements each cell evenly. Effectively evens the spreading of the change (delta).

Example: Assume the spread method of Sales R is delta, then the increment or decrement delta value of Sales R is spread evenly at all weeks.
If Sales R is increased by 250 from 10220 then 50 is spread to each week (250 / 5 weeks = 50):

Measure	Sales R
Month A	10470
Week 1	3050
Week 2	1600
Week 3	1900
Week 4	1420
Week 5	2500

ps (Period Start)

Apply delta to the starting period.

pe (Period End)

Apply delta to the ending period.

Overriding Spread Methods

When you edit a parent value you can change how data will be spread by entering a symbol indicating the preferred spread method. Type the new value followed by r, e, p, or d. The spread method is changed for that specific data edit and is not permanently changed.

The alternate spread methods are listed in the following table.

Symbol	Symbol Name	Description
r	Replicate	Replicate copies the entered value to all child cells below the aggregate level parent. This method can be used for measures that have an aggregation method of Total or Recalc.
e	Even	Even divides the entered value evenly to all child cells below the aggregate level. This method can be used for measures that have an aggregation method of Total or Recalc.
p	Proportional	Proportional spreads the difference between the original and entered value to all child cells below the aggregate level, based on that cell's percent contribution to the original value in the edited cell. This method can be used for measures that have an aggregation method of Total.
d	Delta	Delta spreads the difference between the original and entered value evenly to all child cells below the aggregate level. This method can be used for measures that have an aggregation method of Total.

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, RPAS CE 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.

RPAS CE iterates through the selected cells by measure, then by column, then by row. Locked cell information is immediately transferred to the RPAS CE 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 4–40 Lock Month Level Cell

	WP Sales Reg U	Fcst Sales U	Bas
▲ Aug FY2020	100	2,077	
8/8/2020	10	Format	
8/15/2020	20	Lock Cells	
8/22/2020	30	Unlock Cells	
8/29/2020	40	Unlock All Cells	
▲ Sep FY2020	125	Fill	
9/5/2020	30	Apply Position Filter	


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

Figure 4–41 Lock Cell Lock Icon

	WP Sales Reg U
▲ Aug FY2020	 100
8/8/2020	10
8/15/2020	20
8/22/2020	30
8/29/2020	40
▲ Sep FY2020	125
9/5/2020	30


- Increase the first week of the month.

Figure 4–42 Increase the First Week

	WP Sales Reg U
▲ Aug FY2020	 100
8/8/2020	50
8/15/2020	20
8/22/2020	30
8/29/2020	40
▲ Sep FY2020	125
9/5/2020	30

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

Figure 4–43 Calculation Results

	WP Sales Reg U
▲ Aug FY2020	 100
8/8/2020	50
8/15/2020	11
8/22/2020	17
8/29/2020	22
▲ Sep FY2020	125
9/5/2020	30

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 RPAS CE 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, right click the measure header and click **Lock Selected Rows**.

Figure 4–44 Lock Entire Measure

Determine # of Options

Location All Dimensions Product Calendar

Measure (unsaved) Missy Cardigan Sweaters

	A / Conservative / Cold	A / Conservative / Marine	A / Conservative / Mixed Humid	A / Conservative / Very Cold	A / FashionForward / Very Cold
Sales R	40,101	5,588	17,284	29,038	13,397
Sales U		46	143	240	71
Sales AUR		121.50	120.80	121.10	177.3
GM R		3,233	9,992	16,782	7,611
GM R %		57.9%	57.8%	57.8%	56.8%
LY Markdown		18.3%	10.0%	11.2%	19.0%
LA Markdown		0.0%	0.0%	0.0%	0.0%

- 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 4–45 Entire Measure Locked

Determine # of Options

Location All Dimensions Product Calendar

Measure (unsaved) Missy Cardigan Sweaters

	A / Conservative / Cold	A / Conservative / Marine	A / Conservative / Mixed Humid	A / Conservative / Very Cold	A / FashionForward / Very Cold
Sales R	40,101	5,588	17,284	29,038	
Sales U	329	46	143	240	
Sales AUR	122.01	121.50	120.80	121.10	

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 4–46 Locked Positions

Create Options				
Measure (unsaved)				
Product				
	Retail Price	Cost	IMU %	
Missy Cardigan Sweaters	148.89	61.08	59.0%	
54291800 - Contrast Elbow Patch Cardigan - Black	130.00	53.59	58.8%	
63214451 - Waffle Knit Shawl Collar Cardigan -	100.00	37.88	62.1%	
65945004 - Waffle Knit Shawl Collar Cardigan -	100.00	41.98	58.0%	
77316938 - Angled Front Merino Wool Cardigan -	200.00	80.65	59.7%	
78498351 - Angled Front Merino Wool Cardigan -	200.00	80.65	59.7%	

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 RPAS CE 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 4–47 Locked Subclass

	Retail Price	Cost	IMU %
Missy 3/4 Sleeve	100.00	44.95	55.1%
96880516 - Sheer Hem Velvet Top - Raisnette	100.00	44.95	55.1%
99087419 - V-Neck Silk Top - Soft White	0.00	0.00	0.0%
Missy Cardigan Sweaters	148.89	61.08	59.0%
54291800 - Contrast Elbow Patch Caridgan - Black	130.00	53.59	58.8%
63214451 - Waffle Knit Shawl Collar Cardigan -	100.00	37.88	62.1%
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl	100.00	41.98	58.0%
77316938 - Angled Front Merino Wool Cardigan - Grey	200.00	80.65	59.7%

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, if 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 4–48 Entire Product Position Locked

	Retail Price	Cost
Missy 3/4 Sleeve	100.00	44.95
96880516 - Sheer Hem Velvet Top - Raisnette	100.00	44.95
99087419 - V-Neck Silk Top - Soft White	0.00	0.00
Missy Cardigan Sweaters	148.89	61.08
54291800 - Contrast Elbow	130.00	53.59

4. Increase the subclass level value.

Figure 4–49 Increase the Subclass Level Value

	Retail Price	Cost
Missy 3/4 Sleeve	300.00	44.95
96880516 - Sheer Hem Velvet Top - Raisnette	100.00	44.95
99087419 - V-Neck Silk Top - Soft White	0.00	0.00
Missy Cardigan Sweaters	148.89	61.08
54291800 - Contrast Elbow Patch Caridgan - Black	130.00	53.59

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

Figure 4–50 Calculation Result

	Retail Price	Cost
Missy 3/4 Sleeve	200.00	44.95
96880516 - Sheer Hem Velvet Top - Raisnette	100.00	44.95
99087419 - V-Neck Silk Top - Soft White	300.00	0.00
Missy Cardigan Sweaters	148.89	61.08
54291800 - Contrast Elbow Patch Caridgan - Black	130.00	53.59

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.

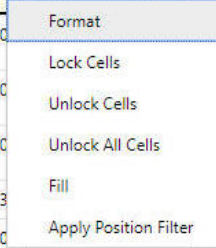
- **Lock Cells:** locks all highlighted cells
- **Unlock Cells:** unlocks all highlighted cells
- **Unlock All Cells:** unlocks all cells without the need to highlight

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 4-51 Lock Right Click Menu

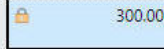
	Retail Price	Cost	
Missy Cardigan Sweaters	289.29	62.01	
54291800 - Contrast Elbow Patch Cardigan -	150.00	53.59	
63214451 - Waffle Knit Shawl Collar Cardigan -	300.00	37.88	
65945004 - Waffle Knit Shawl Collar Cardigan -	300.00		
70063172 - Merino Wool Flutter Cardigan - Black	300.00		
72939751 - Merino Wool Flutter Cardigan - China	300.00		
Missy Cold Shoulder	83.3		
56453938 - Cold Shoulder	75.0		



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

Figure 4-52 Locking Action

	Retail Price	Cost	
Missy Cardigan Sweaters	289.29	62.01	
54291800 - Contrast Elbow Patch Cardigan -	150.00	53.59	
63214451 - Waffle Knit Shawl Collar Cardigan -	300.00	37.88	
65945004 - Waffle Knit Shawl Collar Cardigan -	300.00	41.98	



Protection Processing

Protection processing is the process that makes some cells within a workbook read-only to ensure that, during edits, no conflicts occur within the RPAS CE engine during 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 for the other measures in the rule are edited.

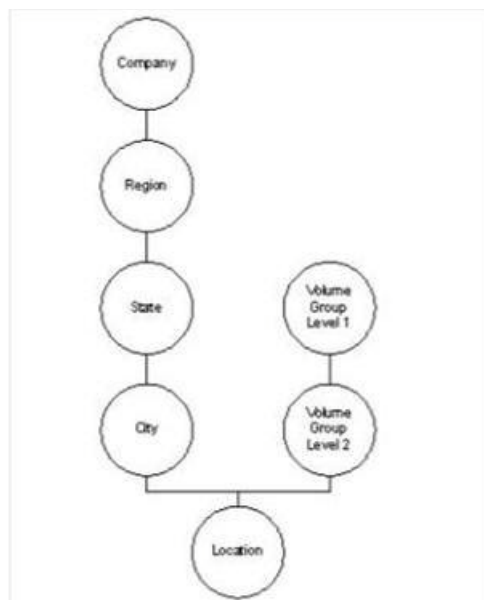
For example, consider the Rule 1 in a typical Product, Location, Calendar dimension.

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 4–53 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.

Using Cut, Copy, and Paste

The cut, copy, and paste features provide flexibility to edit the workbook according to the business needs and transfer data within RPAS CE as well as transferring data to and from RPAS CE and external application (such as, Notepad, Excel, Google Sheets, and so on).

Table 4–4 Cut, Copy and Paste Functionality

Function	Description	Shortcut
Cut	Allows users to copy and clear the data from a selected view and move it to another location within RPAS CE or an external application.	Ctrl+X
Copy	Allows users to copy data from a selected view and move it to another location within RPAS CE or an external application. It differs from the cut operation as it does not clear the selected data from original location.	Ctrl+C
Paste	Allows users to paste the cut or copied data to the selected destination location either within RPAS CE or external application.	Ctrl+V

Using Cut, Copy and Paste Functionality for Cells

Key features of cut, copy, and paste functionality for cells include:

- Cut, copy, and paste functionality is supported beyond what is viewable on your screen
- Only unformatted data can be pasted to a destination area.
- Data in non-editable, read-only, protected, or locked measures or cells cannot be cut, it can only be copied.

- The shortcut commands for cut, copy and paste (Ctrl+X, Ctrl+C, and Ctrl+V) will work between RPAS CE and an external application.

Right-click features for cut, copy and paste only work within RPAS CE. It allows for cut, copy, paste functionality in mobile devices like tablets and smartphones where keyboard shortcuts are unavailable.

- Using cut, copy and paste functionality for non-contiguous (non-adjacent) cells is not recommended, as the paste result may differ from your expected result. For more details on non-contiguous selection refer to [Selecting a Group of Non-Contiguous Rows or Columns](#).
- For optimum performance, the maximum number of cells that can be copied at one time is 10,000. If more data needs to be copied it is recommended to copy and paste multiple smaller groups of cells.
- If data in a copied selection contains empty values at the beginning or the end of the entire selection, then the empty values are ignored. For example, copy two cells (one list value and one empty cell) and then select the destination cells for pasting. In both cells, the list value is pasted, and the empty value is ignored.

A value of 0 as an integer or real number is not considered a empty value.

Figure 4–54 Copy and Pasting with Empty Values

Missy Cardigan Sweaters	Missy Cold Shoulder	Missy Cold Shoulder
Brand	Color	Brand
	Price Tier	Color
Price Tier	Brand	Price Tier

Missy Long Sleeve Sweaters	Missy Long Sleeve Sweaters
Brand	Brand
Brand	Color
Brand	Price Tier

Instructions for Cells

Perform the following steps to use cut, copy, and paste functionality for cells.

1. Select all data cells that you need to either cut or copy.
2. Either cut or copy the data to the clipboard.
 - a. Cut the data using either Ctrl+X or the right-click functionality (within RPAS CE) for Cut.
 - b. Copy the data using either Ctrl+C or the right-click functionality (within RPAS CE) for Copy. When cells are copied, only textual content is transferred.

Figure 4–55 *Selecting the Cell to Copy or Cut with a Shortcut***Ctrl+X to Cut or Ctrl+C to Copy**

	RAmP	RAmpP	RavgD	RAvgE	RavgP	RAvgpE
10000010 Leather Loafer - Black 6 B	5.00	6.00	0.00	7.00	3.00	0.00
10000011 Leather Loafer - Black 6.5 B	2.00	3.00	0.00	4.00	0.00	0.00
10000012 Leather Loafer - Black 7 B	6.00	7.00	0.00	8.00	4.00	0.00
10000013 Leather Loafer - Black 7.5 B	3.00	4.00	0.00	5.00	1.00	0.00
10000014 Leather Loafer - Black 8 B	5.00	6.00	0.00	7.00	3.00	0.00
10000015 Leather Loafer - Black 8.5 B	1.00	2.00	0.00	3.00	2.00	0.00
10000016 Leather Loafer - Black 9 B	8.00	9.00	0.00	10.00	6.00	0.00
10000017 Leather Loafer - Black 9.5 B	5.00	6.00	0.00	7.00	3.00	0.00
10000018 Leather Loafer - Black 10 B	6.00	7.00	0.00	8.00	4.00	0.00
10000019 Leather Loafer - Brown 6 B	4.00	5.00	0.00	6.00	2.00	0.00

Figure 4–56 *Selecting Cells to Copy or Cut with Right-click Functionality***Right-click and then select Cut or Copy**

	RAmP	RAmpP	RavgD	RAvgE	RavgP	RAvgpE
10000010 Leather Loafer - Black 6 B	5.00	6.00	6.57	7.00	3.00	0.00
10000011 Leather Loafer - Black 6.5 B	2.00	3.00	6.57	4.00	0.00	0.00
10000012 Leather Loafer - Black 7 B	6.00	7.00		8.00	0.00	0.00
10000013 Leather Loafer - Black 7.5 B	3.00	4.00		5.00	1.00	0.00
10000014 Leather Loafer - Black 8 B	5.00	6.00		7.00	3.00	0.00
10000015 Leather Loafer - Black 8.5 B	2.00	3.00		3.00	2.00	0.00
10000016 Leather Loafer - Black 9 B	8.00	9.00		10.00	6.00	0.00
10000017 Leather Loafer - Black 9.5 B	5.00	6.00		7.00	3.00	0.00
10000018 Leather Loafer - Black 10 B	6.00	7.00		8.00	4.00	0.00
10000019 Leather Loafer - Brown 6 B	4.00	5.00	4.00	6.00	2.00	0.00

- To paste the data from the clipboard, select the destination cell (either within RPAS CE or external application) and use Ctrl+V or the right-click functionality (within RPAS CE) for Paste.

Note: Cut or Copied data will display in italicized font until calculated.

Figure 4–57 Select the Destination Cell and use the Paste Shortcut**Select the Destination Cell and use Ctrl+V to Paste**

	RAmp	RAmpP	RavgD	RAvgE	RavgP	RAvgpE
10000010 Leather Loafer - Black 6 B	5.00	6.00	0.00	7.00	3.00	0.00
10000011 Leather Loafer - Black 6.5 B	2.00	3.00	0.00	4.00	0.00	0.00
10000012 Leather Loafer - Black 7 B	6.00	7.00	0.00	8.00	4.00	0.00
10000013 Leather Loafer - Black 7.5 B	3.00	4.00	0.00	5.00	1.00	0.00
10000014 Leather Loafer - Black 8 B	5.00	6.00	0.00	7.00	3.00	0.00
10000015 Leather Loafer - Black 8.5 B	1.00	2.00	0.00	3.00	2.00	0.00
10000016 Leather Loafer - Black 9 B	8.00	9.00	0.00	10.00	6.00	0.00
10000017 Leather Loafer - Black 9.5 B	5.00	6.00	0.00	7.00	3.00	0.00
10000018 Leather Loafer - Black 10 B	6.00	7.00	0.00	8.00	4.00	0.00
10000019 Leather Loafer - Brown 6 B	4.00	5.00	0.00	6.00	2.00	0.00

Figure 4–58 Select the Destination Cell and use the Right-click Functionality**Select the Destination Cell and Right-click to Paste**

	RAmp	RAmpP	RavgD	RAvgE	RavgP	RAvgpE
10000010 Leather Loafer - Black 6 B	5.00	6.00	0.00	7.00	3.00	0.00
10000011 Leather Loafer - Black 6.5 B	2.00	3.00	0.00	4.00	0.00	0.00
10000012 Leather Loafer - Black 7 B	6.00	7.00	0.00	8.00	0.00	0.00
10000013 Leather Loafer - Black 7.5 B	3.00	4.00	0.00	5.00	1.00	0.00
10000014 Leather Loafer - Black 8 B	5.00	6.00	0.00	7.00	3.00	0.00
10000015 Leather Loafer - Black 8.5 B	1.00	2.00	2.00	3.00	2.00	0.00
10000016 Leather Loafer - Black 9 B	8.00	9.00	8.00	10.00	6.00	0.00
10000017 Leather Loafer - Black 9.5 B	5.00	6.00	5.00	7.00	3.00	0.00
10000018 Leather Loafer - Black 10 B	6.00	7.00	6.00	8.00	4.00	0.00
10000019 Leather Loafer - Brown 6 B	4.00	5.00	4.00	6.00	2.00	0.00

Figure 4–59 The Paste Result

Paste Result

	RAmP	RAmP	RavgD	RAvgE	RavgP	RAvgpE
10000010 Leather Loafer - Black 6 B	5.00	6.00	6.57	7.00	3.00	0.00
10000011 Leather Loafer - Black 6.5 B	2.00	3.00	6.57	4.00	0.00	0.00
10000012 Leather Loafer - Black 7 B	6.00	7.00	6.00	8.00	0.00	0.00
10000013 Leather Loafer - Black 7.5 B	3.00	4.00	3.00	5.00	1.00	0.00
10000014 Leather Loafer - Black 8 B	5.00	6.00	5.00	7.00	3.00	0.00
10000015 Leather Loafer - Black 8.5 B	2.00	3.00	2.00	3.00	2.00	0.00
10000016 Leather Loafer - Black 9 B	8.00	9.00	8.00	10.00	6.00	0.00
10000017 Leather Loafer - Black 9.5 B	5.00	6.00	5.00	7.00	3.00	0.00
10000018 Leather Loafer - Black 10 B	6.00	7.00	6.00	8.00	4.00	0.00
10000019 Leather Loafer - Brown 6 B	4.00	5.00	4.00	6.00	2.00	0.00

Using Copy and Paste Functionality for Columns and Rows

Key features of copy, and paste functionality for columns and rows include:

- Copy, and paste functionality for entire rows or columns is different than it is for cells. It is a permanent change which cannot be undone because the data is copied to server and not the clipboard.
- RPAS CE allows multiple column or rows copy paste within the application.

To perform copy, and paste functionality for multiple columns and rows, the number of columns or rows selected for copy should be same as number of columns or rows selected for paste.

If the number of columns or rows are not same while pasting the data, you will receive an error message.

- It is recommended to not use copy and paste functionality for an entire row header or column header between RPAS and an external application. The same recommendation applies copying from an external application to an RPAS row or column.

If you must copy the data of an entire row or column to copy and paste between RPAS and an external application, perform the following steps.

1. Select all the cells of column or row by using the shift command. Use the shortcut command, (Ctrl + C) to copy from the source application (RPAS or external).
 2. In the destination application (RPAS or external), select a destination cell for paste, and then use the shortcut command, (Ctrl + V) to paste the data.
- When copying restricted cells (that is, read only cells, locked cells, protected cells, format mismatch) the data is skipped when pasting.

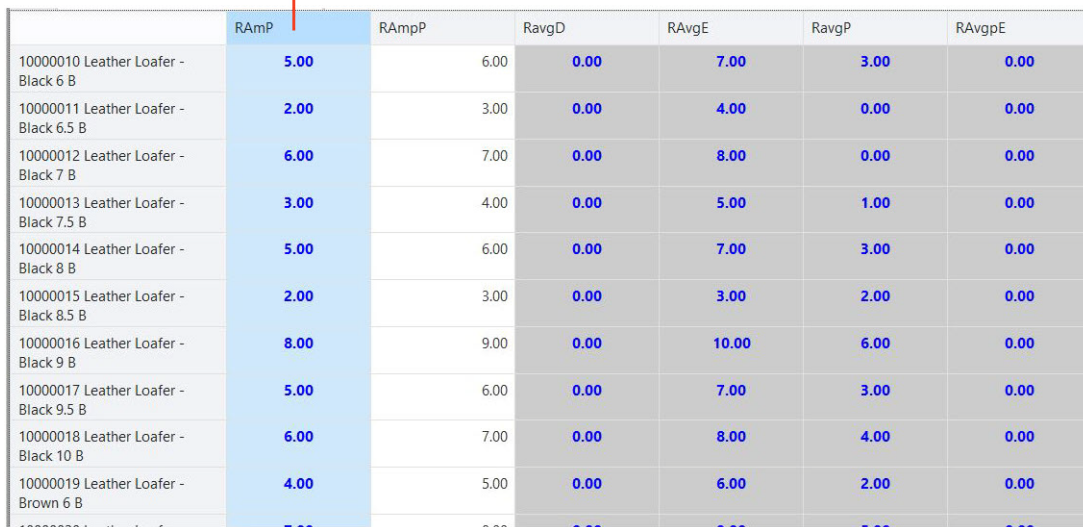
Instructions for Columns or Rows

Perform the following steps to use copy, and paste functionality for columns or rows.

1. Click the header to select either an entire column or row to copy.

Figure 4–60 Select the Header to Copy

Click the Column Header to Select the Column



	RAmP	RAmP	RavgD	RAvgE	RavgP	RAvgpE
10000010 Leather Loafer - Black 6 B	5.00	6.00	0.00	7.00	3.00	0.00
10000011 Leather Loafer - Black 6.5 B	2.00	3.00	0.00	4.00	0.00	0.00
10000012 Leather Loafer - Black 7 B	6.00	7.00	0.00	8.00	0.00	0.00
10000013 Leather Loafer - Black 7.5 B	3.00	4.00	0.00	5.00	1.00	0.00
10000014 Leather Loafer - Black 8 B	5.00	6.00	0.00	7.00	3.00	0.00
10000015 Leather Loafer - Black 8.5 B	2.00	3.00	0.00	3.00	2.00	0.00
10000016 Leather Loafer - Black 9 B	8.00	9.00	0.00	10.00	6.00	0.00
10000017 Leather Loafer - Black 9.5 B	5.00	6.00	0.00	7.00	3.00	0.00
10000018 Leather Loafer - Black 10 B	6.00	7.00	0.00	8.00	4.00	0.00
10000019 Leather Loafer - Brown 6 B	4.00	5.00	0.00	6.00	2.00	0.00

2. Either use Ctrl+C or right-click and select Copy Column or Copy Row.
3. Select the destination column or row in RPAS CE where you want to paste the data.

Figure 4–61 Select the Header to Paste

Click the Column Header to Select the Paste Destination

	RAmP	RAmP	RavgD	RAvgE	RavgP	RAvgpE
10000010 Leather Loafer - Black 6 B	5.00	6.00	0.00	7.00	3.00	0.00
10000011 Leather Loafer - Black 6.5 B	2.00	3.00	0.00	4.00	0.00	0.00
10000012 Leather Loafer - Black 7 B	6.00	7.00	0.00	8.00	0.00	0.00
10000013 Leather Loafer - Black 7.5 B	3.00	4.00	0.00	5.00	1.00	0.00
10000014 Leather Loafer - Black 8 B	5.00	6.00	0.00	7.00	3.00	0.00
10000015 Leather Loafer - Black 8.5 B	2.00	3.00	0.00	3.00	2.00	0.00
10000016 Leather Loafer - Black 9 B	8.00	9.00	0.00	10.00	6.00	0.00
10000017 Leather Loafer - Black 9.5 B	5.00	6.00	0.00	7.00	3.00	0.00
10000018 Leather Loafer - Black 10 B	6.00	7.00	0.00	8.00	4.00	0.00
10000019 Leather Loafer - Brown 6 B	4.00	5.00	0.00	6.00	2.00	0.00

- To paste the data, use command Ctrl+V or right-click and select Paste Column or Paste Row.

Figure 4–62 Paste Results

Paste the Data with Ctrl+V or Right-click to Paste Column/Row

	RAmP	RAmP	RavgD	RAvgE	RavgP	RAvgpE
10000010 Leather Loafer - Black 6 B	5.00	6.00	5.00	7.00	3.00	0.00
10000011 Leather Loafer - Black 6.5 B	2.00	3.00	2.00	4.00	0.00	0.00
10000012 Leather Loafer - Black 7 B	6.00	7.00	6.00	8.00	0.00	0.00
10000013 Leather Loafer - Black 7.5 B	3.00	4.00	3.00	5.00	1.00	0.00
10000014 Leather Loafer - Black 8 B	5.00	6.00	5.00	7.00	3.00	0.00
10000015 Leather Loafer - Black 8.5 B	2.00	3.00	2.00	3.00	2.00	0.00
10000016 Leather Loafer - Black 9 B	8.00	9.00	8.00	10.00	6.00	0.00
10000017 Leather Loafer - Black 9.5 B	5.00	6.00	5.00	7.00	3.00	0.00
10000018 Leather Loafer - Black 10 B	6.00	7.00	6.00	8.00	4.00	0.00
10000019 Leather Loafer - Brown 6 B	4.00	5.00	4.00	6.00	2.00	0.00

Workspace Operations

The majority of the work you perform within the application occurs within a personal workspace built around a segment. These workspaces are constructed by creating a

copy of the subset of the applications data described by the segment and are, therefore, to a degree, independent from the domain and its data.

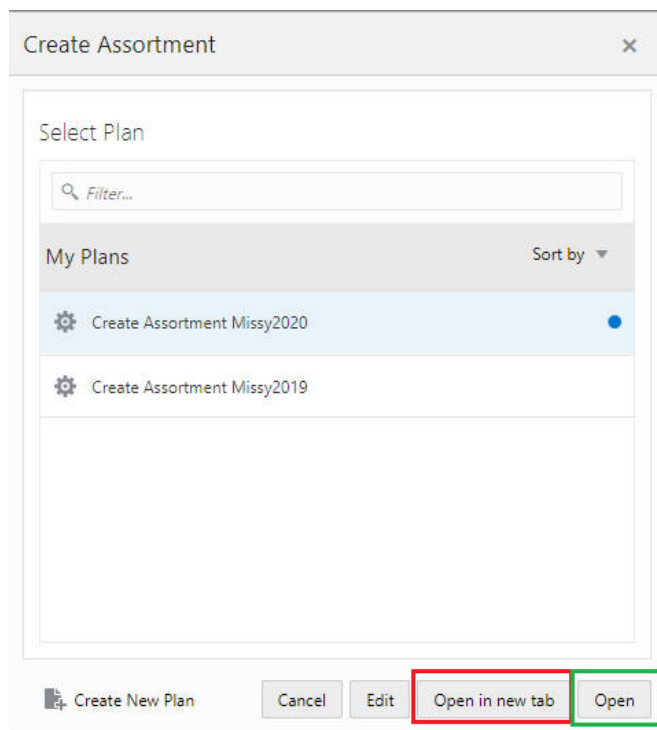
There are two reasons for the creation of workspaces within the application. First, by limiting the workspace to the subset of the application's data defined within a segment, it is possible to improve the overall performance of operations. Second, the workspace serves as a sandbox where you can experiment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

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

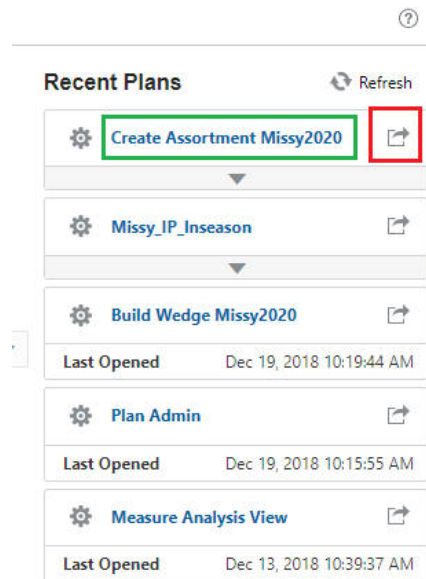
Opening Workspaces

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

Figure 4–63 *Opening a Workspace*



In [Figure 4–63](#), 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.

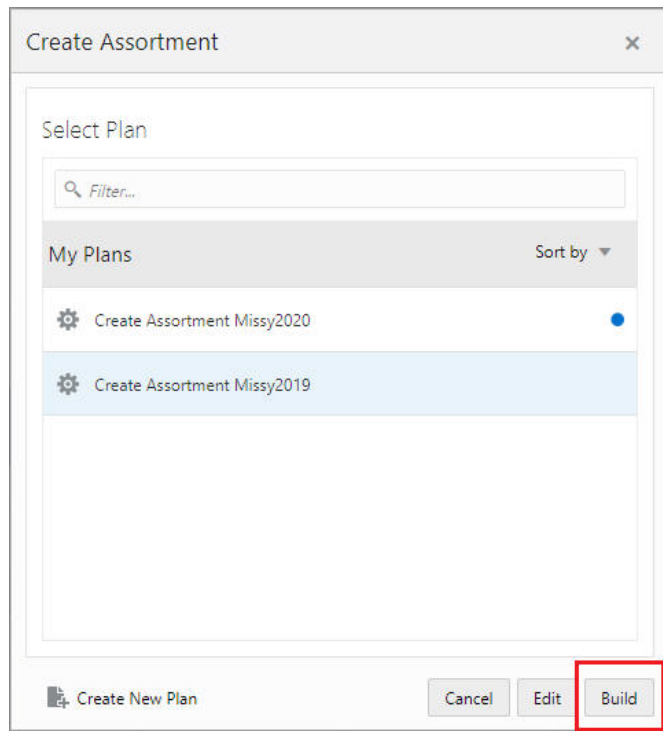
Figure 4–64 Recent Plans

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 4–65 Building Workspaces

In [Figure 4–65](#), 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.

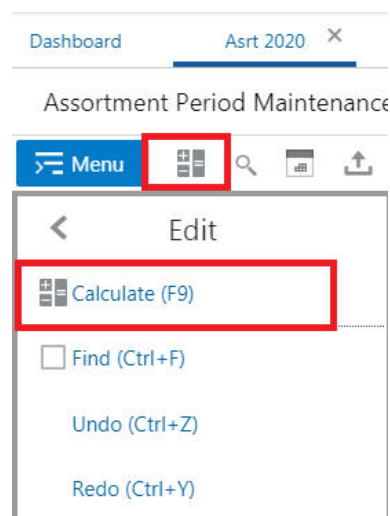
For example, consider the relationship between total sales (the summation of regular, markdown, and clearance sales), markdown sales, and markdown percentage. An edit to total sales results in a change to markdown sales so that the markdown percentage remains fixed. However, if both total sales and markdown 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.

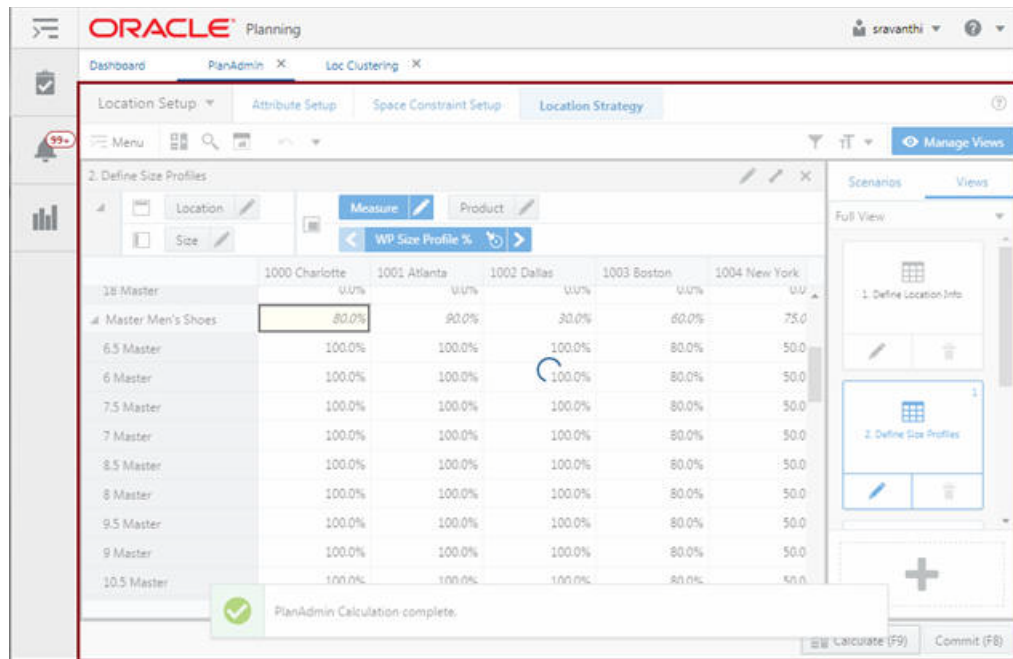
Figure 4–66 Calculate Workspace



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 4–67](#), you cannot interact with the area indicated by the red box. Outside of it, you can continue with your work.

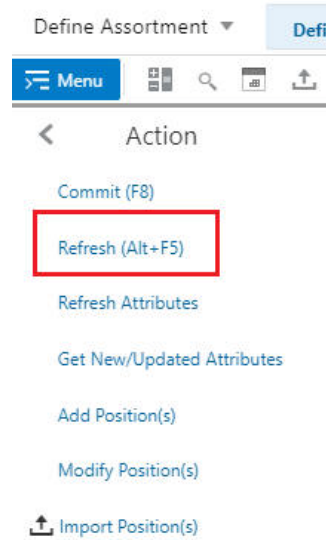
Figure 4–67 Partial Refresh During Calculation

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.

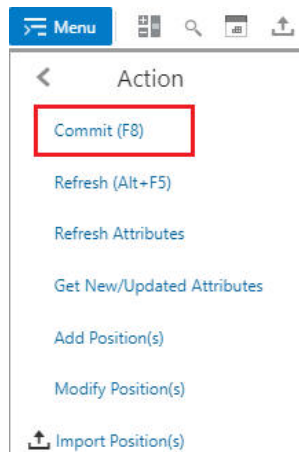
Figure 4–68 Refresh Workspaces

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.

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

Figure 4–69 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.

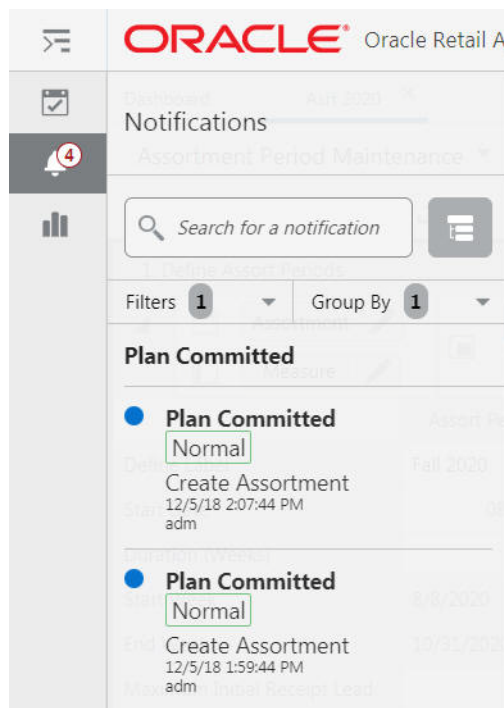
Figure 4–70 Commit Notifications

Figure 4–70 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 4–71 Close the Workspace

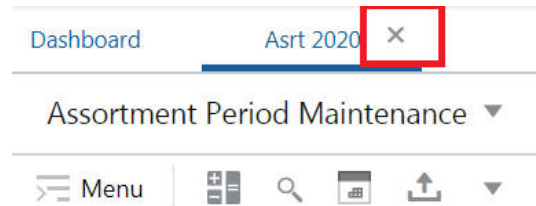


Figure 4–71 shows the application tab for the open 2020 Merch Plan segment workspace. Click the X icon on the tab to save any outstanding edits and close the workspace.

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 RPAS CE 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

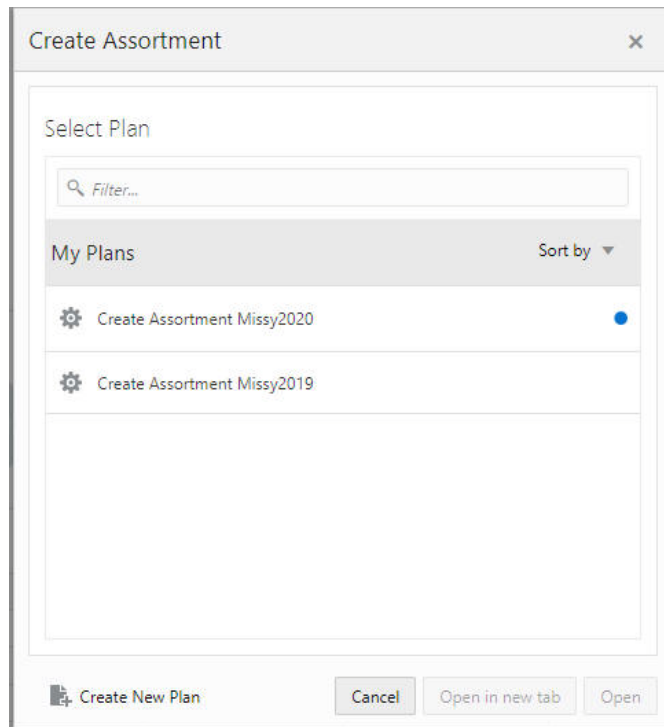
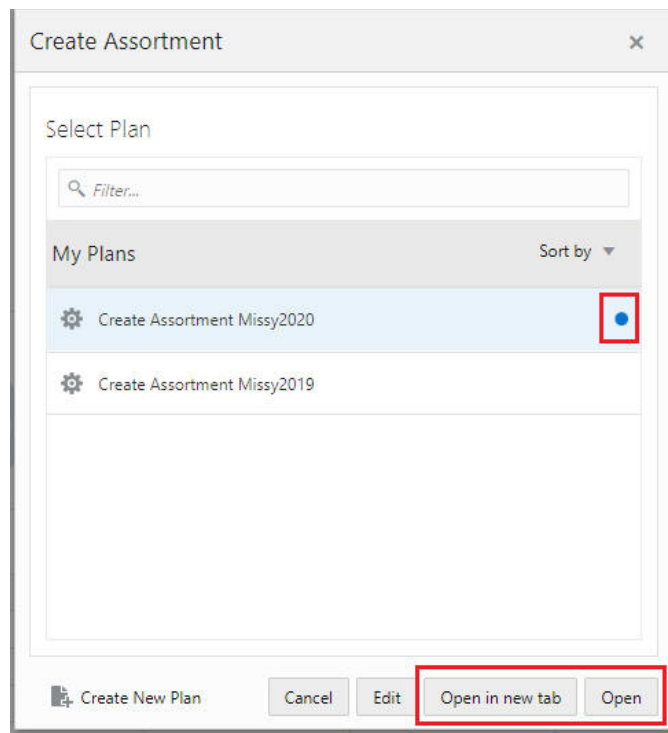
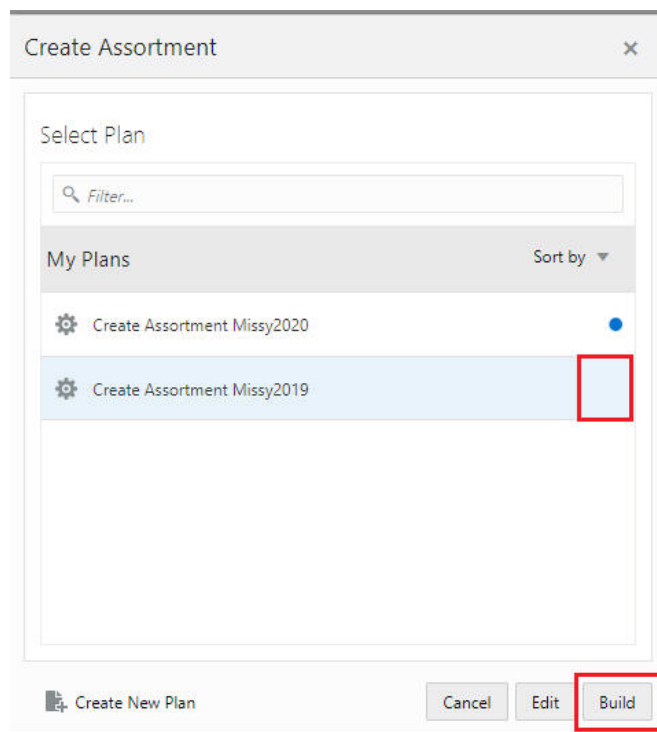
Figure 5–1 Segment Dialog Box

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.

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 Create Assortment Active Segment

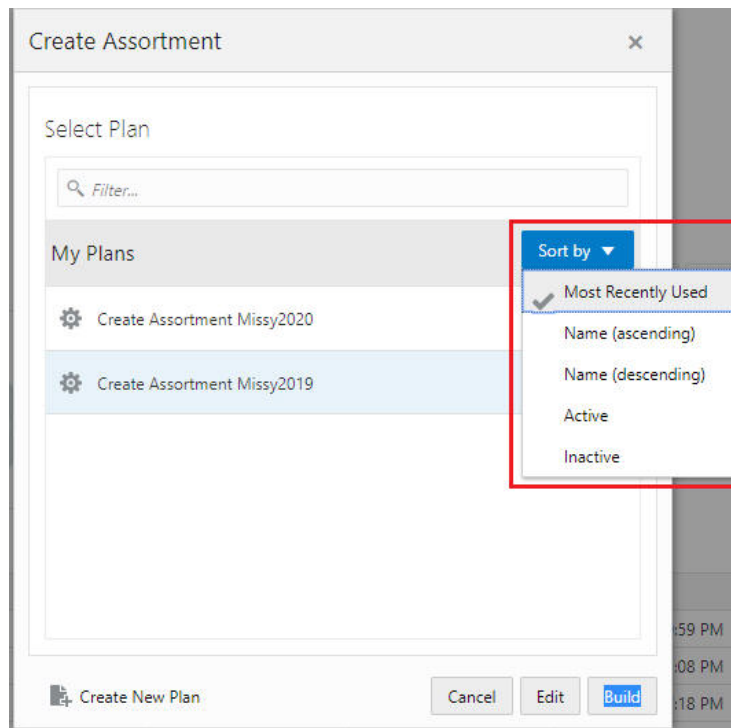
Conversely, an inactive segment, that is, one without a blue dot, must have its associated workspace built before that workspace can be opened.

Figure 5–3 Create Assortment 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 list.

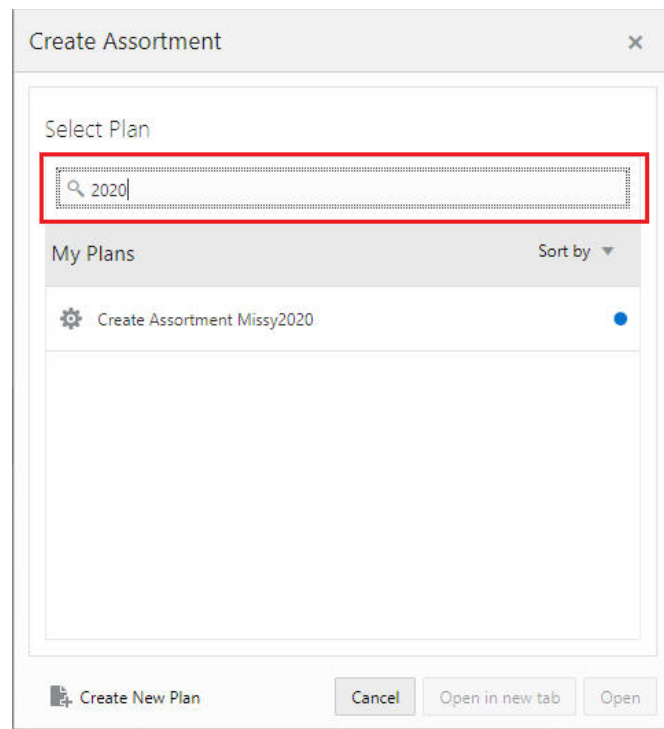
Figure 5–4 Segments Sort By List



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.

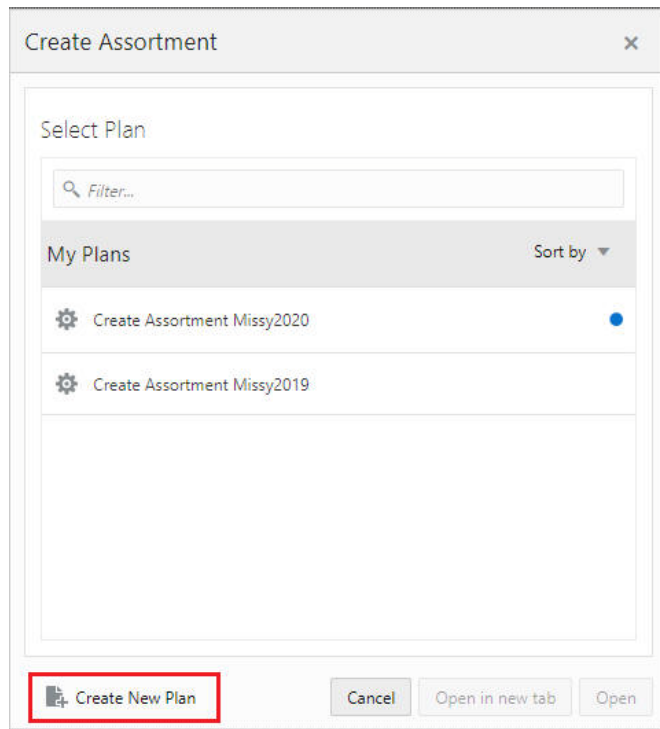
To search for a particular segment, type text into the search box. As shown in [Figure 5–5](#), the value 2020 has been entered into the Select Plan search box. The list of segments displayed include only those with the value 2020 in the label.

Figure 5-5 Segment Search

Creating a New Segment

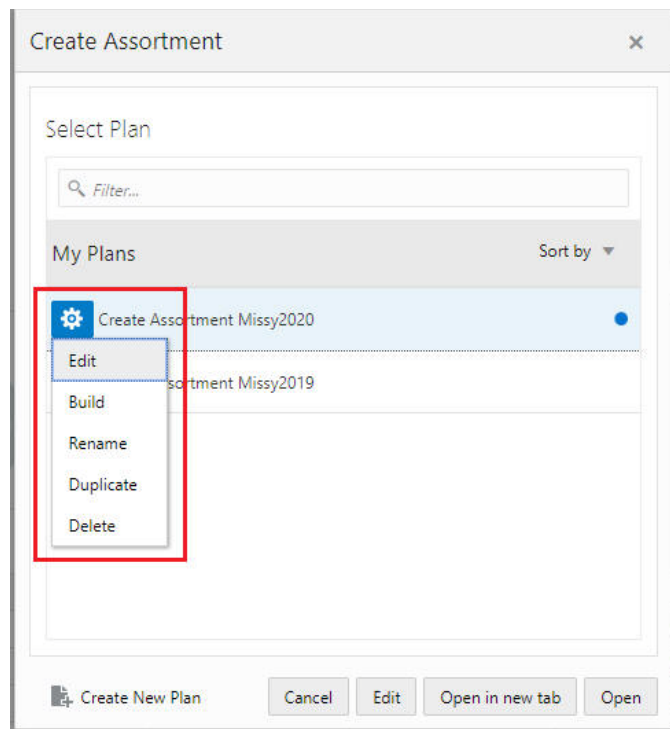
If no segments exist, the Enter Plan Label dialog box is opened via the Segment dialog box. Enter the plan label and click **OK**. You see the Segment Wizard.

A new segment can be created either with the Create New link in the lower left corner. You are prompted for a label for that segment, and then taken to the Segment Wizard (see [Wizards](#)). If you select any of the segments, then the buttons, Edit, Open in new tab, and Open are displayed.

Figure 5–6 Create New Segment

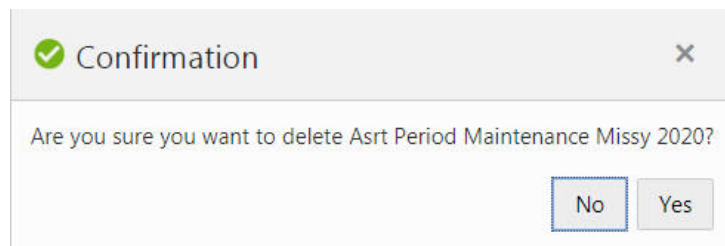
Action Menu

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](#)).

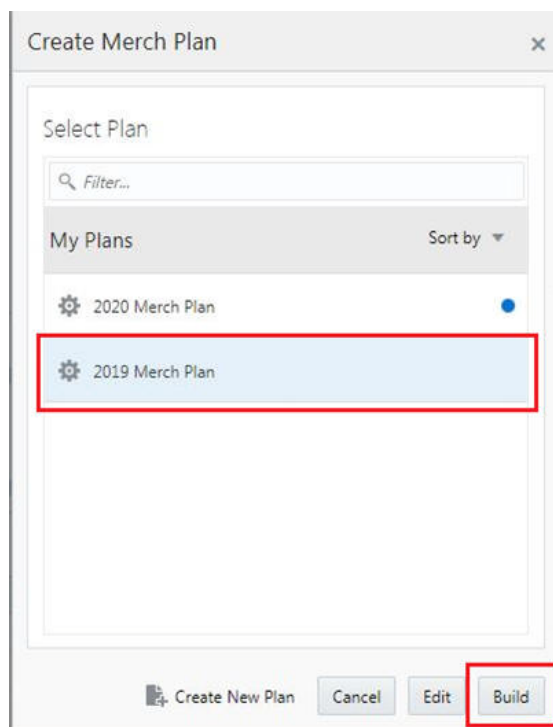
Note that once the segment is submitted for building, the segment is locked until the operation is completed. If any of the operations on the segment, such as open, edit,

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.

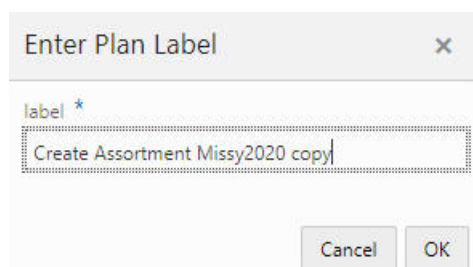
Figure 5–9 Building a Segment



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*

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.

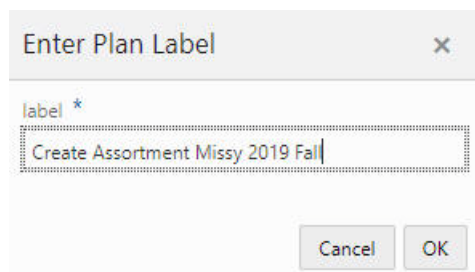
Renaming a Segment

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. The non-calendar positions are sorted alphabetically by default, based on the Label attribute. The Calendar positions are sorted chronologically.

Figure 5–12 Renaming a Segment

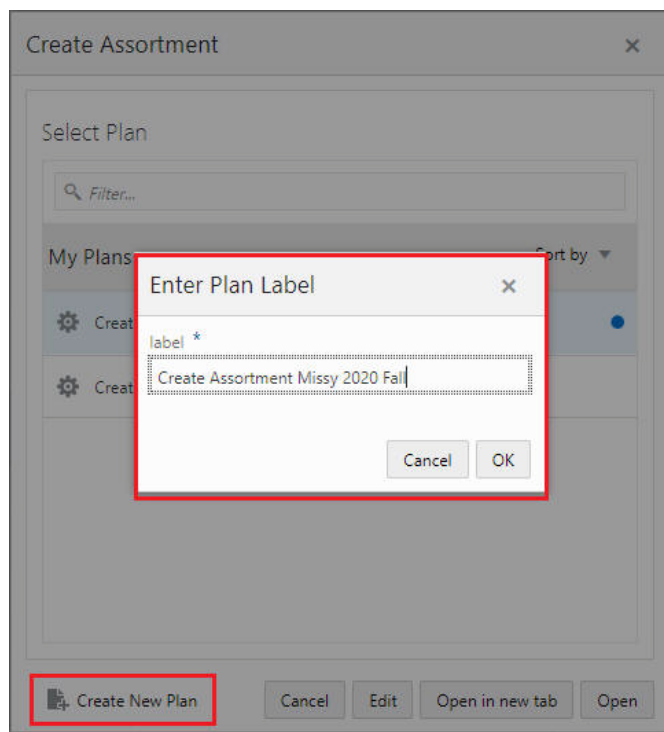


Wizards

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 **Create New** options, no level in the wizard is pre-selected and no position is shown in the position area. Only when you select a level, the positions for the respective level appear in the wizard.

Figure 5–13 Create New Plan Wizard

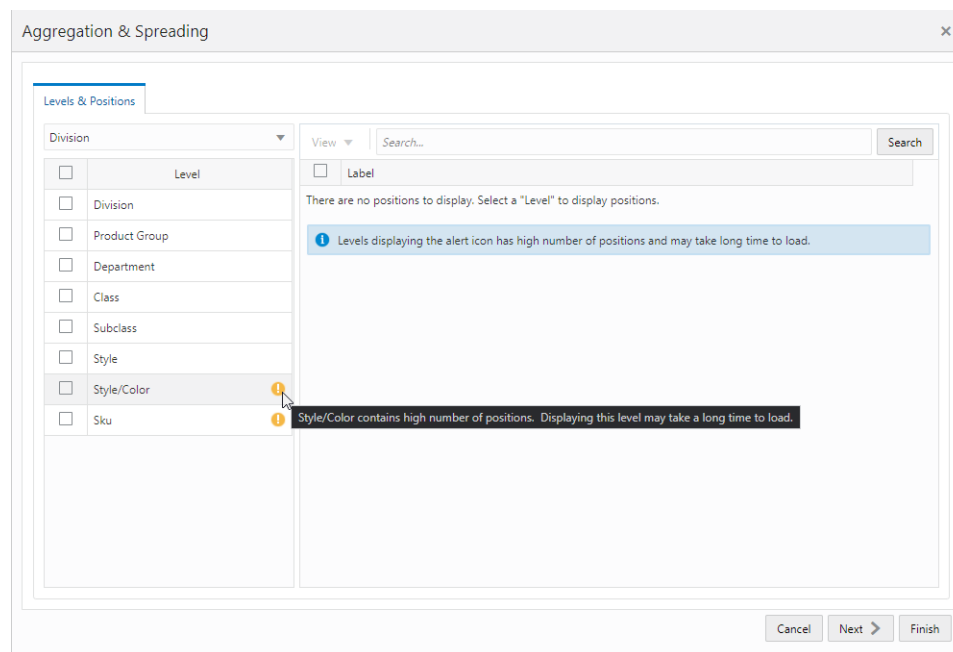


If any level has a higher number of positions then an alert icon appears next to the level and the position area displays a message, *Levels displaying the alert icon have high number of positions and may take long time to load.*

When you hover over the alert icon next to a level, it displays a message which states: The level contains high number of positions and displaying this position may take longer time to load.

The default position count threshold is set at 50,000 positions. Positions with more than 50,000, are considered higher and the alert icon appears next to the level. The position count is configurable by an administrator as per the requirement.

Figure 5–14 Wizard with a High Number of Positions



To load positions faster into the wizard, choose a higher level in the wizard, such as department which has a fewer number of positions. You can still select the level with alert icon if you need to select or clear positions at that level, but it may take time for wizard to load those positions.

When you create a new segment again, the wizard step defaults to the last selections. If the prior selections made in wizard are at the child level with a high position count, then it will impact the loading time of wizard. To improve the wizard loading time, choose to work with higher levels with less position count. This improves the position loading time when you open the wizard the next time.

When the positions display in the wizard, the non-calendar positions are sorted alphabetically by default based on the Label attribute. The Calendar positions are sorted chronologically.

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.

Level and Position Selector

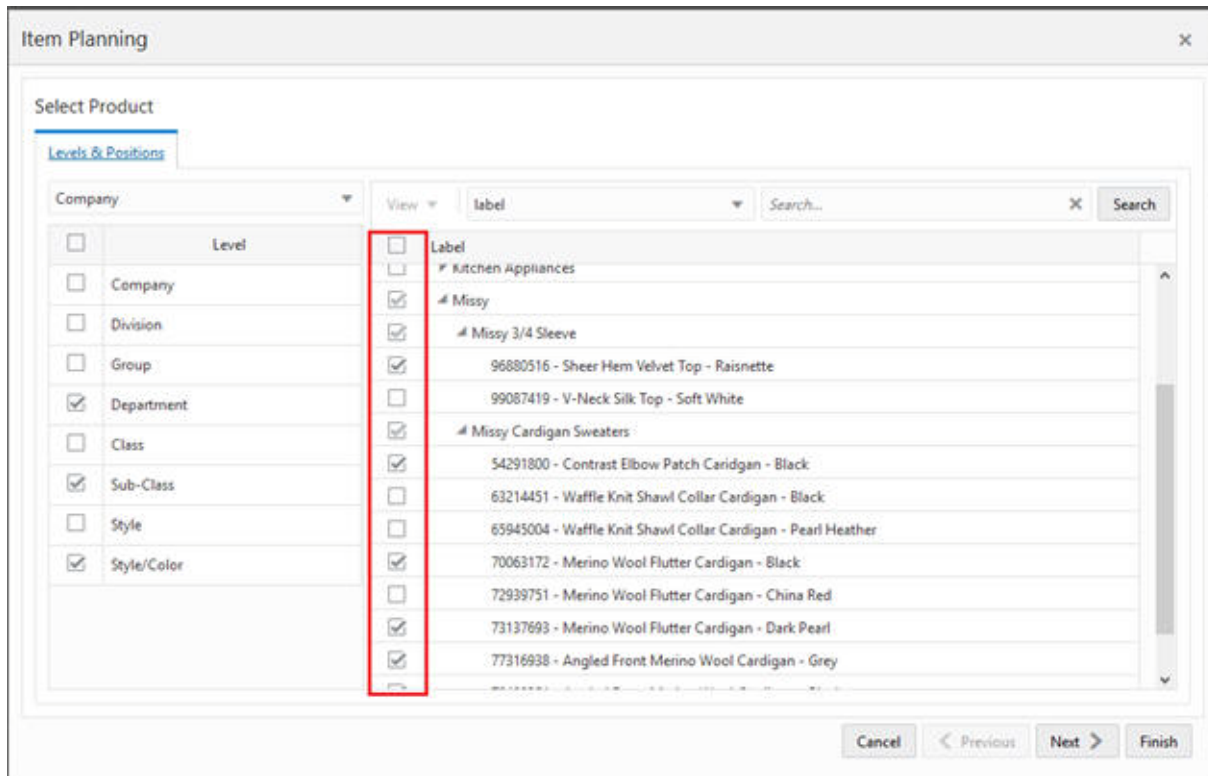
To select a level or position, complete the following steps.

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 list. When you select a different branch in the 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 5–15 Select Positions



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

Figure 5-16 Select All Positions

Item Planning

Select Product

Levels & Positions

Company: Company

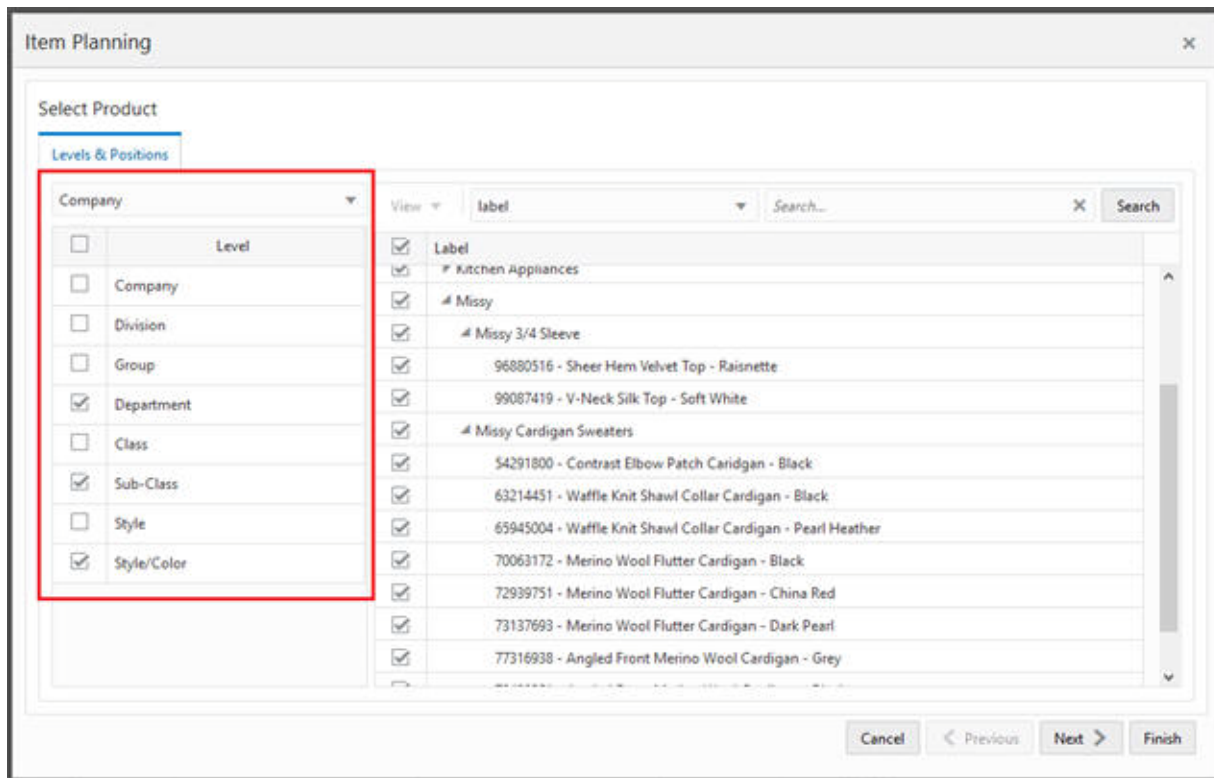
View: label

Search...

Level	Label
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Label
<input type="checkbox"/>	<input checked="" type="checkbox"/> Kitchen Appliances
<input type="checkbox"/>	<input checked="" type="checkbox"/> Missy
<input type="checkbox"/>	<input checked="" type="checkbox"/> Missy 3/4 Sleeve
<input type="checkbox"/>	<input checked="" type="checkbox"/> 96880516 - Sheer Hem Velvet Top - Raisnette
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 99087419 - V-Neck Silk Top - Soft White
<input type="checkbox"/>	<input checked="" type="checkbox"/> Missy Cardigan Sweaters
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 54291800 - Contrast Elbow Patch Cardigan - Black
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 63214451 - Waffle Knit Shawl Collar Cardigan - Black
<input type="checkbox"/>	<input checked="" type="checkbox"/> 65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 70063172 - Merino Wool Flutter Cardigan - Black
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 72939751 - Merino Wool Flutter Cardigan - China Red
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 73137693 - Merino Wool Flutter Cardigan - Dark Pearl
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 77316938 - Angled Front Merino Wool Cardigan - Grey

Cancel Previous Next Finish

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.

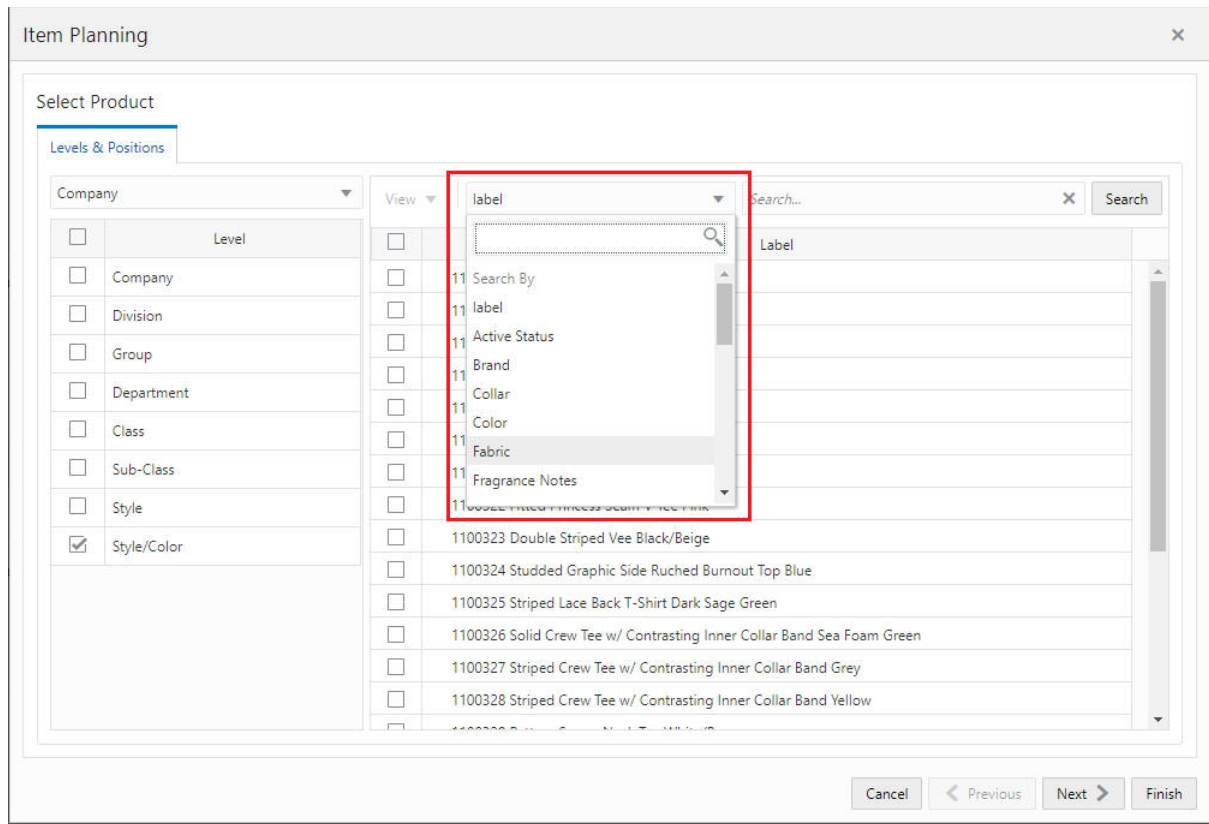
Figure 5–17 Change Position Levels

Filter Positions 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.

Select the required attribute as a filter and search for the positions that have the attribute value you selected. For example, if you select Color as the filter and then select Black from the list, all the positions that have Black as the color attribute value will be listed.

Figure 5–18 Filter Position (Segment Wizard)



The user can also filter product based on status such as active and non-active. By selecting the attribute, **Active Status**, the user is presented with options like **Active Since 2019**, **Non-active**, and so on. This will help the user to easily filter out any non-active item to exclude in their selection.

Figure 5–19 Filter Position by Status

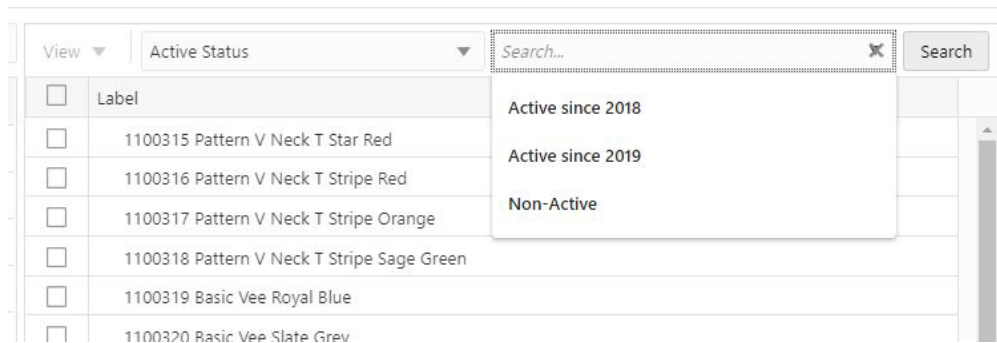


Figure 5–20 Filter Positions by Attribute Example

Item Planning

Select Product

Levels & Positions

Company

View Color Black Search

Level	Label
<input type="checkbox"/> Company	<input type="checkbox"/> 1100321 Basic Vee Black
<input type="checkbox"/> Division	<input type="checkbox"/> 1100337 Ballet Neck Tee Black
<input type="checkbox"/> Group	<input type="checkbox"/> 1100341 Oversized V-Neck Tee Charcoal
<input type="checkbox"/> Department	<input type="checkbox"/> 1100342 Scoop Neck Jersey Tunic Black
<input type="checkbox"/> Class	<input type="checkbox"/> 1100353 Ruched Waist, Sleeveless, V-Neck Top Black
<input type="checkbox"/> Sub-Class	<input type="checkbox"/> 1100358 Lace Halter Black
<input type="checkbox"/> Style	<input type="checkbox"/> 1100371 S/S Blouse Novelty Collar Black
<input checked="" type="checkbox"/> Style/Color	<input type="checkbox"/> 1100372 S/S Novelty Buttons Blouse Black
	<input type="checkbox"/> 1100387 Basic Long Tank Black
	<input type="checkbox"/> 1100396 Long Sleeve Cardigan Black

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 5–21 Next Dimension

Item Planning

Select Product

Levels & Positions

Company

View Label Search... Search

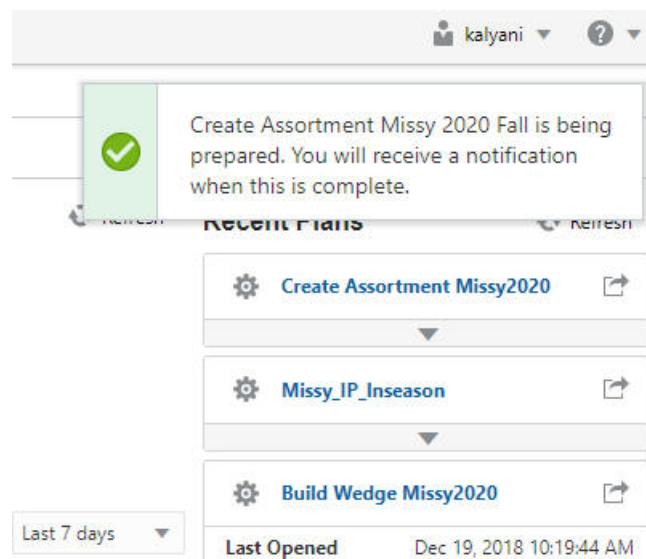
Level	Label
<input type="checkbox"/> Company	<input checked="" type="checkbox"/> Kitchen Appliances
<input type="checkbox"/> Division	<input checked="" type="checkbox"/> Missy
<input type="checkbox"/> Group	<input checked="" type="checkbox"/> Missy 3/4 Sleeve
<input checked="" type="checkbox"/> Department	<input checked="" type="checkbox"/> 9680516 - Sheer Hem Velvet Top - Raisnette
<input type="checkbox"/> Class	<input checked="" type="checkbox"/> 99087419 - V-Neck Silk Top - Soft White
<input checked="" type="checkbox"/> Sub-Class	<input checked="" type="checkbox"/> Missy Cardigan Sweaters
<input type="checkbox"/> Style	<input checked="" type="checkbox"/> 54291800 - Contrast Elbow Patch Cardigan - Black
<input checked="" type="checkbox"/> Style/Color	<input checked="" type="checkbox"/> 63214451 - Waffle Knit Shawl Collar Cardigan - Black
	<input checked="" type="checkbox"/> 65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather
	<input checked="" type="checkbox"/> 70063172 - Merino Wool Flutter Cardigan - Black
	<input checked="" type="checkbox"/> 72939751 - Merino Wool Flutter Cardigan - China Red
	<input checked="" type="checkbox"/> 73137693 - Merino Wool Flutter Cardigan - Dark Pearl
	<input checked="" type="checkbox"/> 77316938 - Angled Front Merino Wool Cardigan - Grey

Cancel < Previous **Next** > Finish

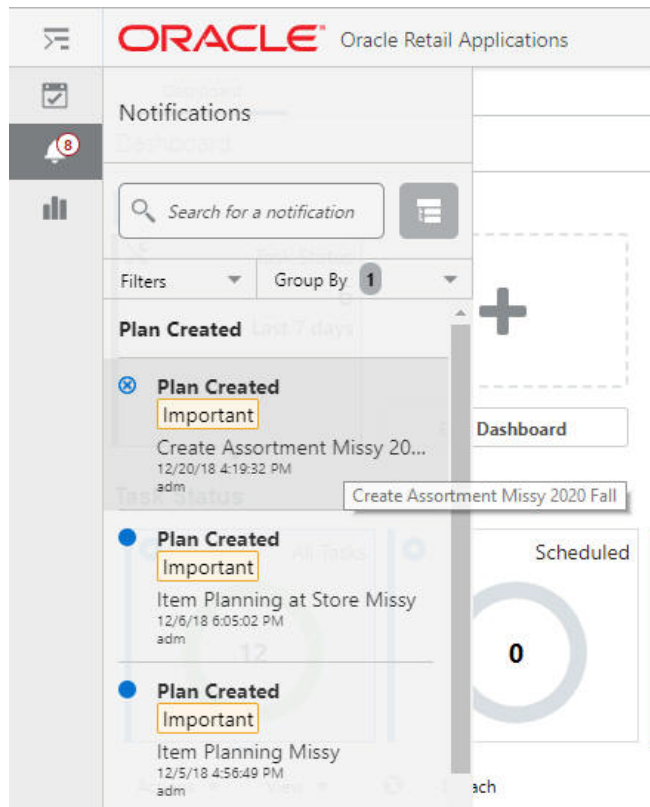
Asynchronous Build

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 5–22 Asynchronous Build



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

Figure 5–23 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

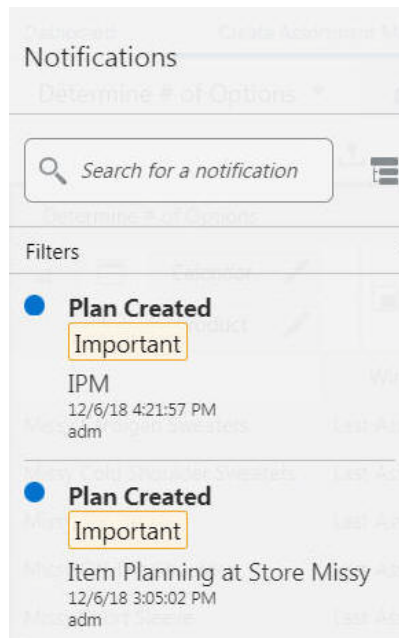
Notification	Severity
Administrative Task Completed	Important
Administrative Task Failed	Critical
Workspace Built	Important
Workspace Build Failed	Critical
Workspace Committed	Normal
Workspace Commit Failed	Critical

Notifications Panel

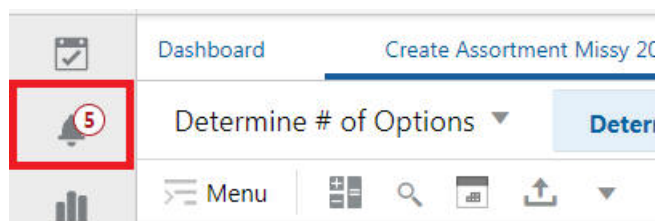
Note: For each notification in the Notifications panel, you see the Type, the Severity, a description, the creation date, and the name of the sender. As shown in [Figure 6–1](#), the sender is identified as *adm* which indicates the notification was sent by the system administrator.

To view the Notifications panel:

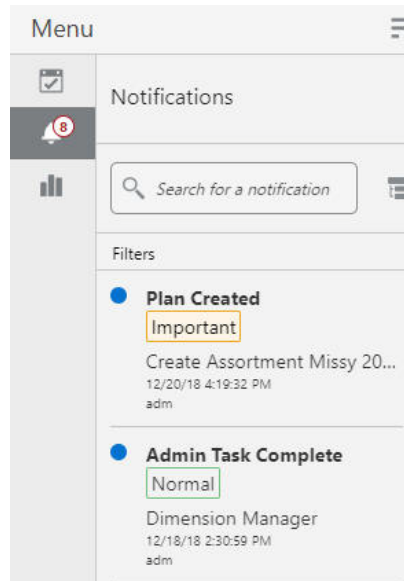
1. Click **Notifications** on the left sidebar menu.

Figure 6–1 Notifications

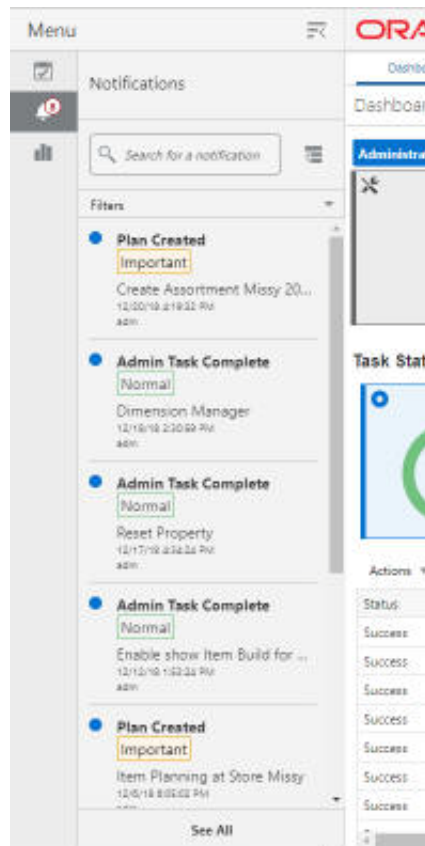
2. You can click on either the notifications icon to open the notifications dialog box. If launched this way, it partially covers the current workspace that you are viewing.

Figure 6–2 Notification Icon

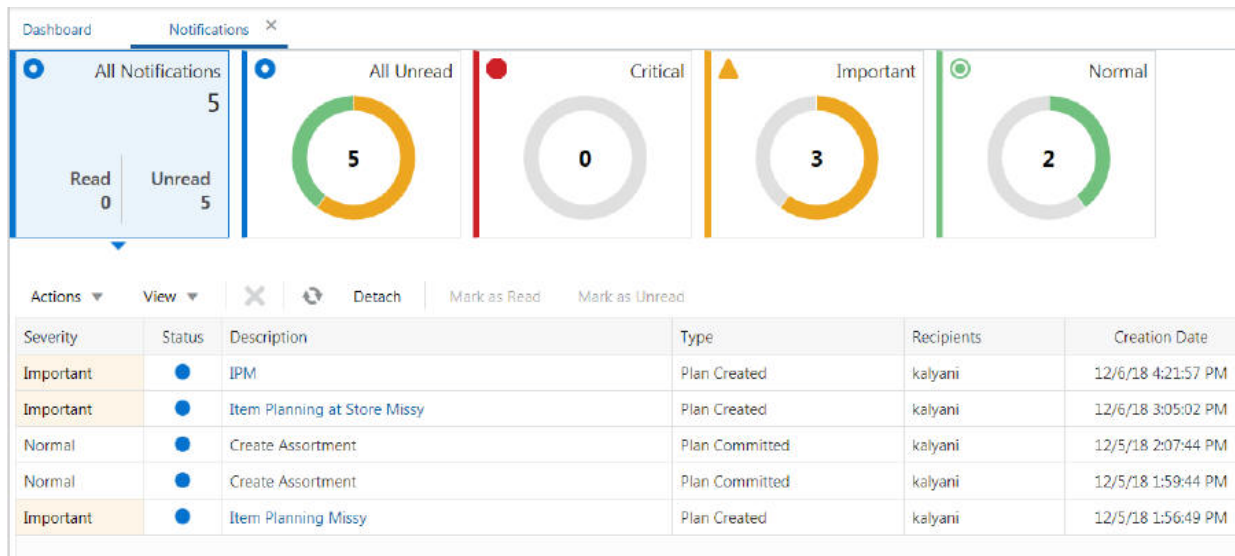
3. If you want to continue with the work in the current workspace and simultaneously launch the Notifications panel, click **Menu**, which launches the notifications list by moving the current workspace.

Figure 6–3 Notification Via Menu

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

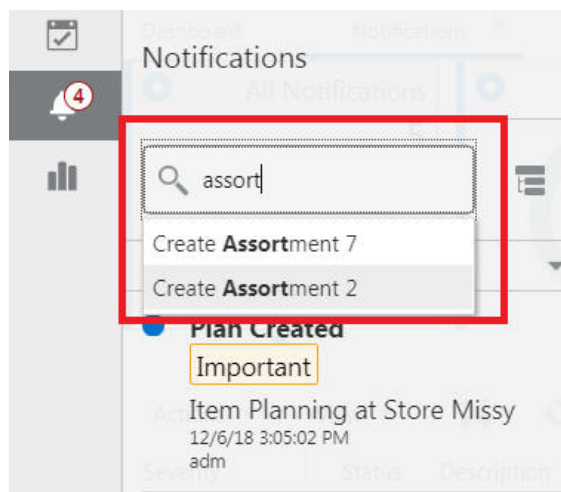
Figure 6–4 Notifications Scroll Bar

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

Figure 6–5 Notifications Tab

Searching for Notifications

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

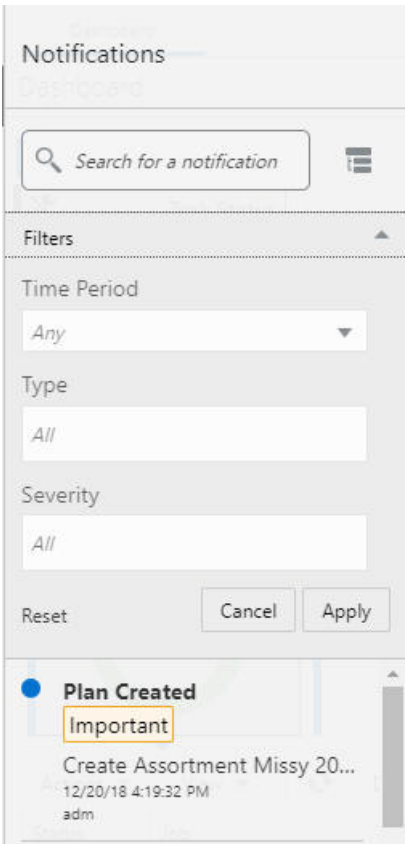
Figure 6–6 Searching for Notifications

Filtering Notifications

To filter notifications:

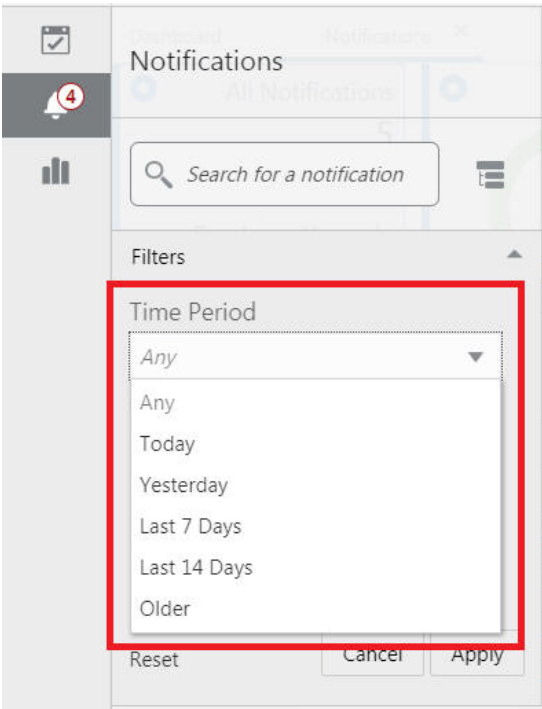
1. Once in the Notifications Module, click the **Filters** list to see the list of available filters. You can filter by Time Period, Type, and Severity. You can also click **Reset** to clear all filters, or click **Apply** to apply the filters.

Figure 6–7 Notifications Filter Options



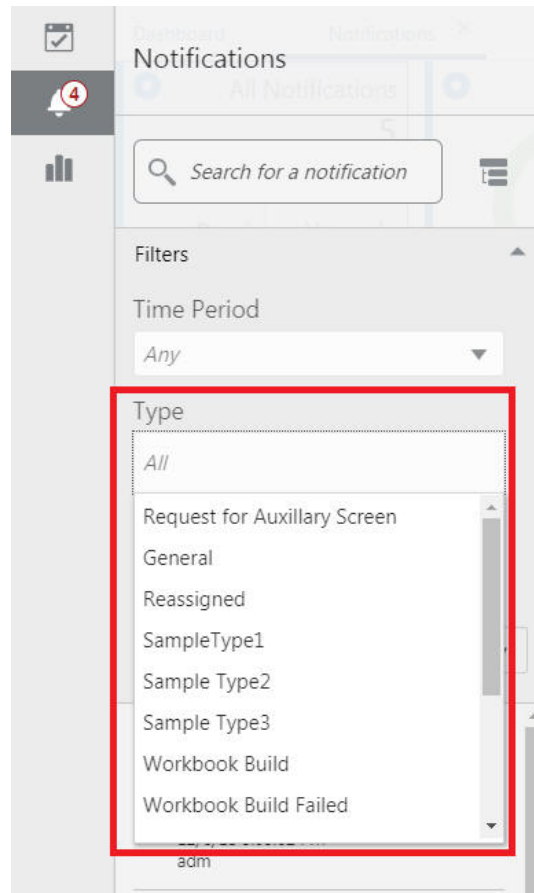
2. Provide values for Time Period, Type, and Severity in the Time Period filter.

Figure 6–8 Notifications Time Period Filter Options

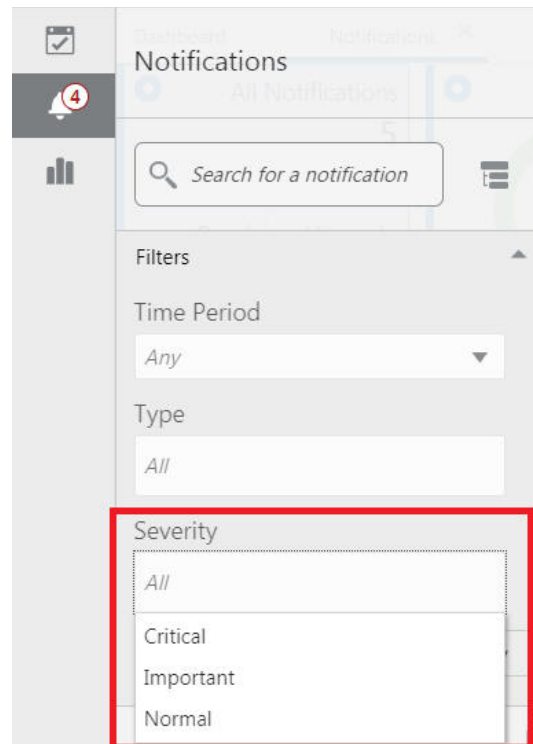


3. Select a Type filter option.

Figure 6–9 Notifications Type Filter Options



4. Select a Severity filter option.

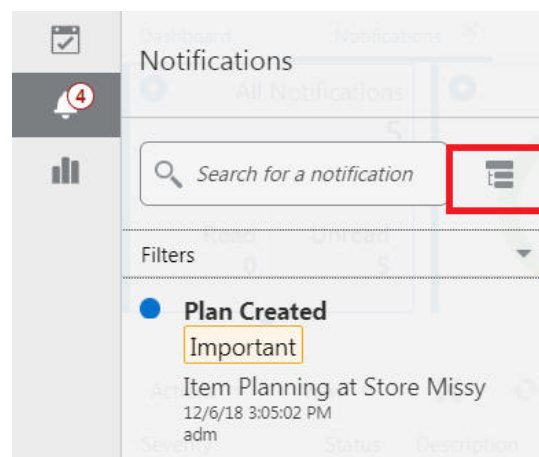
Figure 6–10 Notifications Severity Filter Options

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.

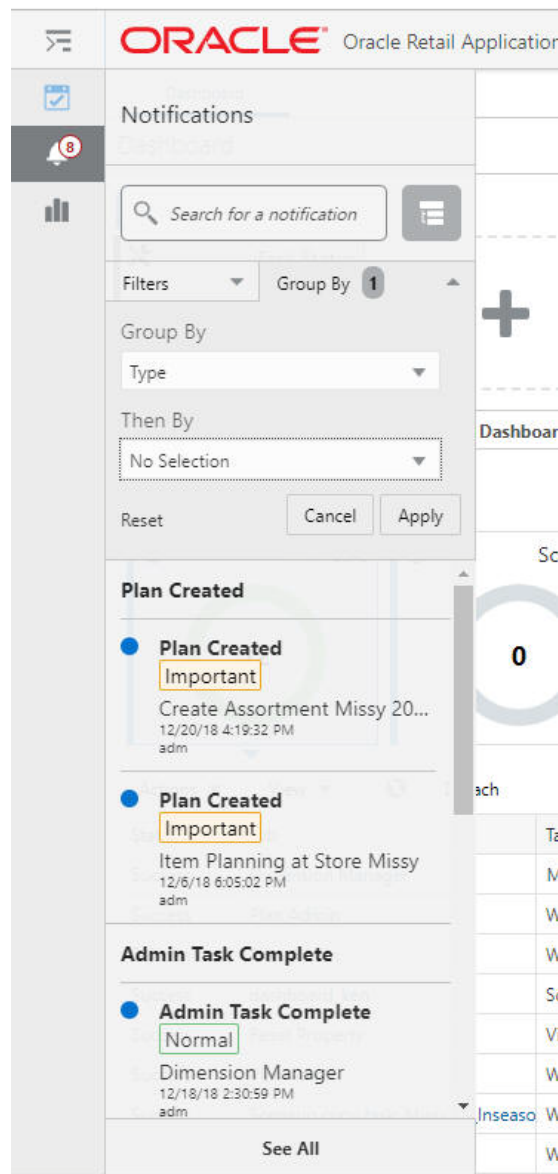
Group Notifications

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 Type

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.

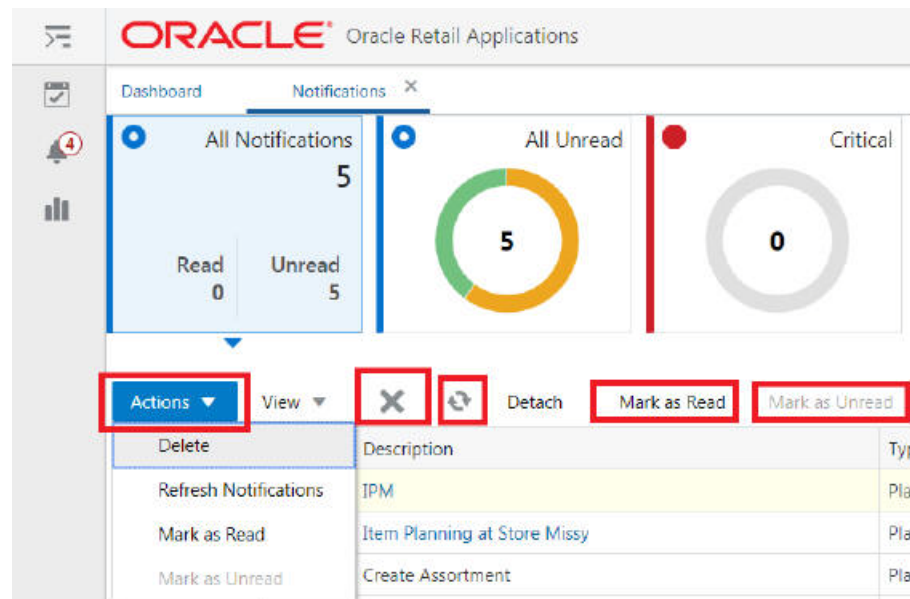
Notifications Tab

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.

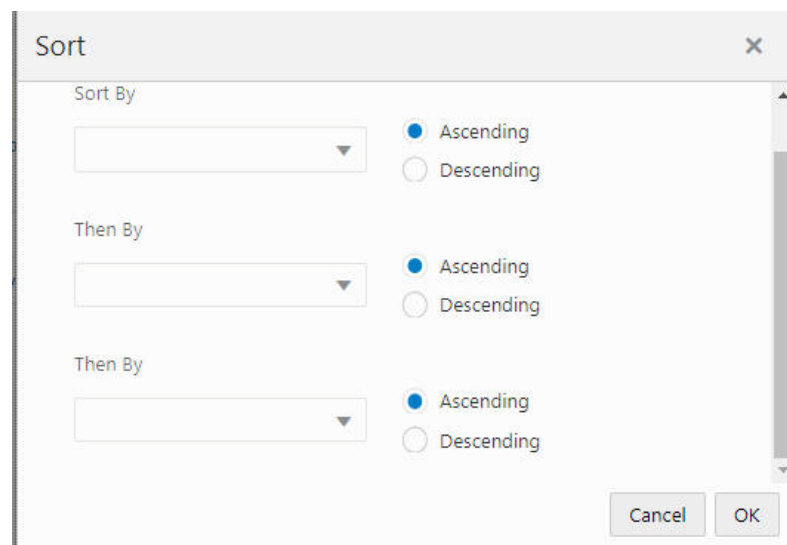
Figure 6–13 Notifications Tab List of Actions



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. The notification also provides you with links for actions such as Edit, Open, Dismiss, and so on, based on the type of notification. [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
Plan build successful	[Plan] is ready.
Plan build failed	[Plan] build failed.
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 RPAS CE in various ways. Changing the level, amount, and layout can make it easier for you to complete certain activities and tasks. For example, a manager might want to view data at a higher level of the product dimension, while a planner can work at a lower level of the dimension to complete necessary tasks. You make these view changes in Edit View.

Launching Edit View

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

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

Figure 7–1 Launching Edit View

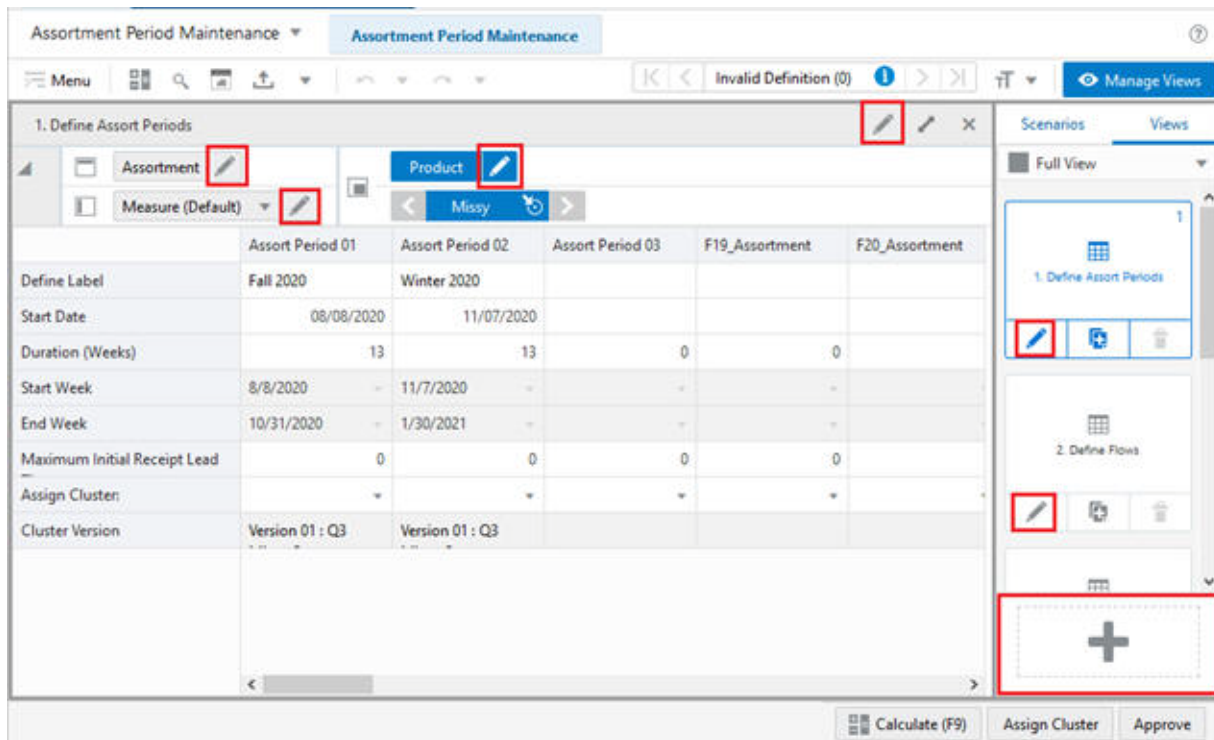
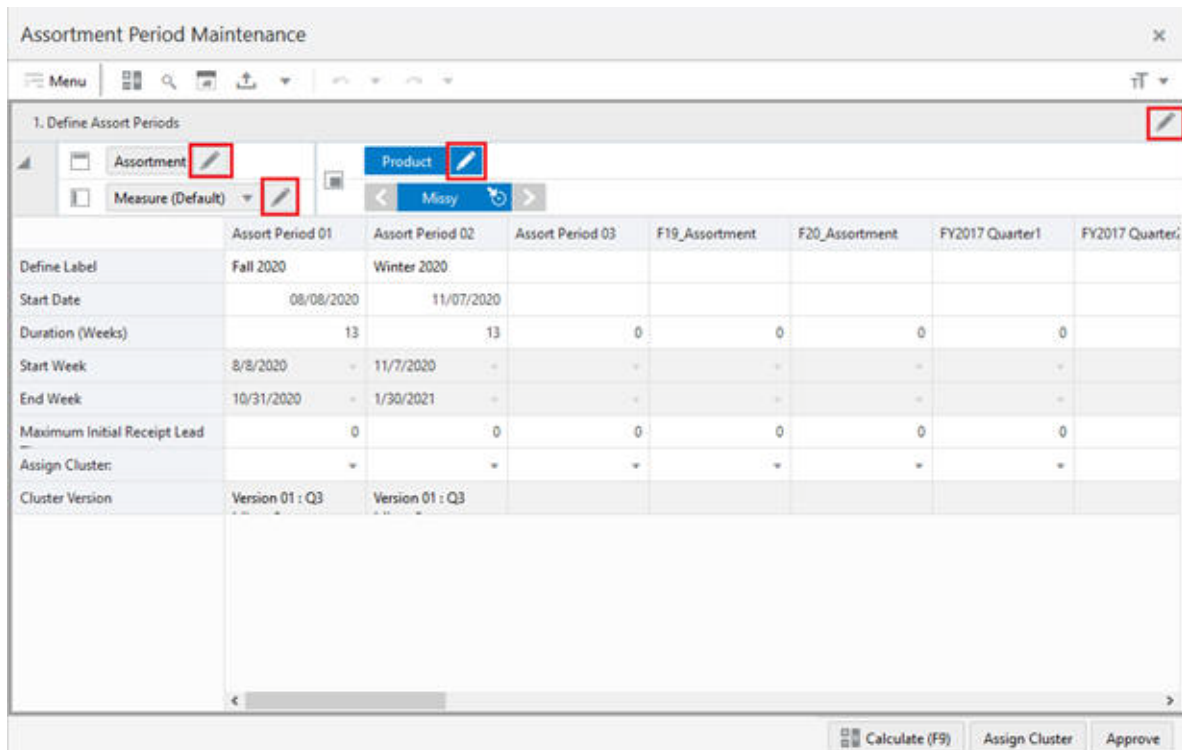


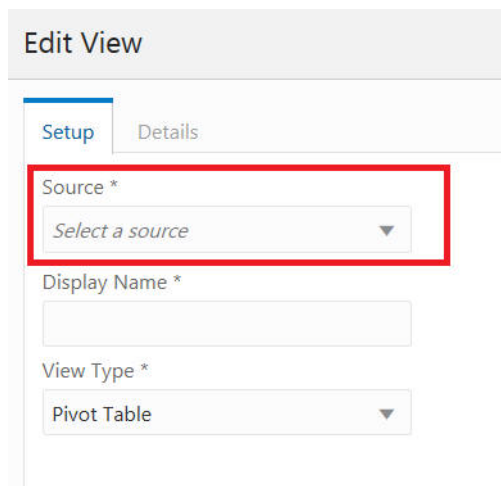
Figure 7–2 Launching Edit View from the Detach View



Source

Choose a source for the View. Any View in the View Management Drawer can be selected. This determines the measures available in the new view you are creating.

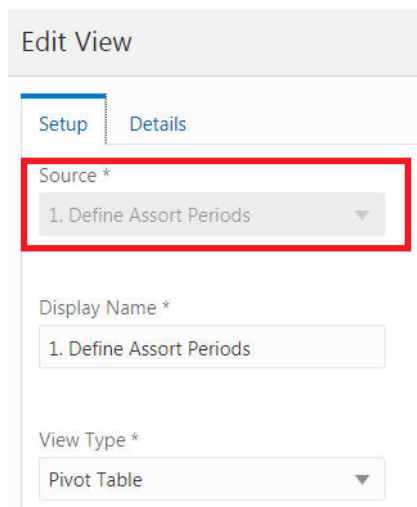
Figure 7–3 Select Source in Edit View While Adding a New View



The screenshot shows the 'Edit View' dialog box with the 'Setup' tab selected. The 'Source' dropdown menu is highlighted with a red box and shows the text 'Select a source'. Below it, the 'Display Name' field is empty, and the 'View Type' dropdown is set to '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

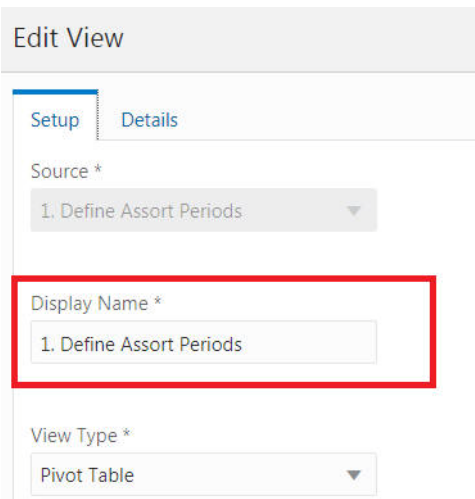


The screenshot shows the 'Edit View' dialog box with the 'Setup' tab selected. The 'Source' dropdown menu is highlighted with a red box and shows the text '1. Define Assort Periods'. Below it, the 'Display Name' field also contains '1. Define Assort Periods', and the 'View Type' dropdown is set to 'Pivot 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



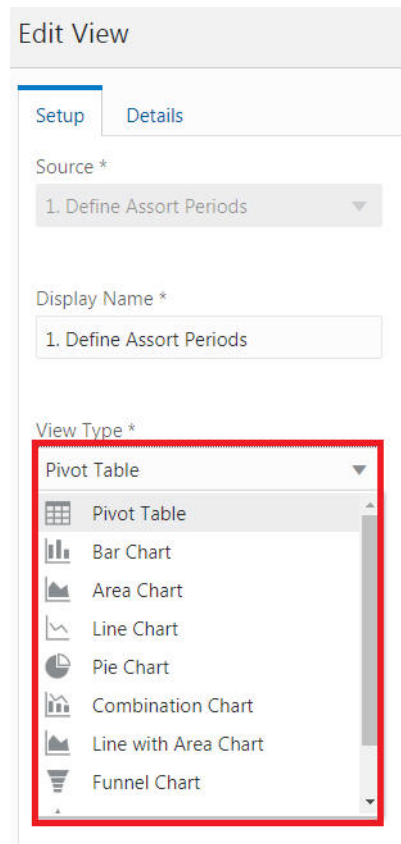
The screenshot shows the 'Edit View' dialog box with the 'Setup' tab active. The 'Source' dropdown menu is set to '1. Define Assort Periods'. The 'Display Name' field, which is highlighted with a red rectangle, also contains the text '1. Define Assort Periods'. Below this, the 'View Type' dropdown menu is set to '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

The screenshot shows the 'Edit View' dialog box with the 'Setup' tab selected. The 'Source' dropdown is set to '1. Define Assort Periods'. The 'Display Name' field also contains '1. Define Assort Periods'. The 'View Type' dropdown is open, showing a list of view types: Pivot Table, Bar Chart, Area Chart, Line Chart, Pie Chart, Combination Chart, Line with Area Chart, and Funnel Chart. The 'Pivot Table' option is currently selected and highlighted.

Edit View

Setup Details

Source *

1. Define Assort Periods

Display Name *

1. Define Assort Periods

View Type *

Pivot Table

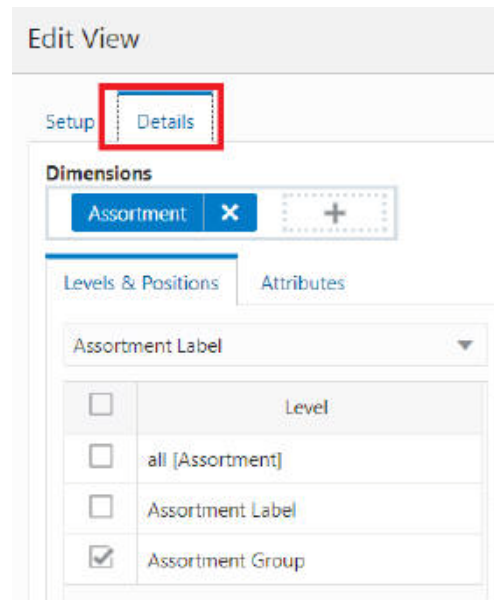
- Pivot Table
- Bar Chart
- Area Chart
- Line Chart
- Pie Chart
- Combination Chart
- Line with Area Chart
- Funnel Chart

Moving and Re-Ordering Dimension Tiles

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

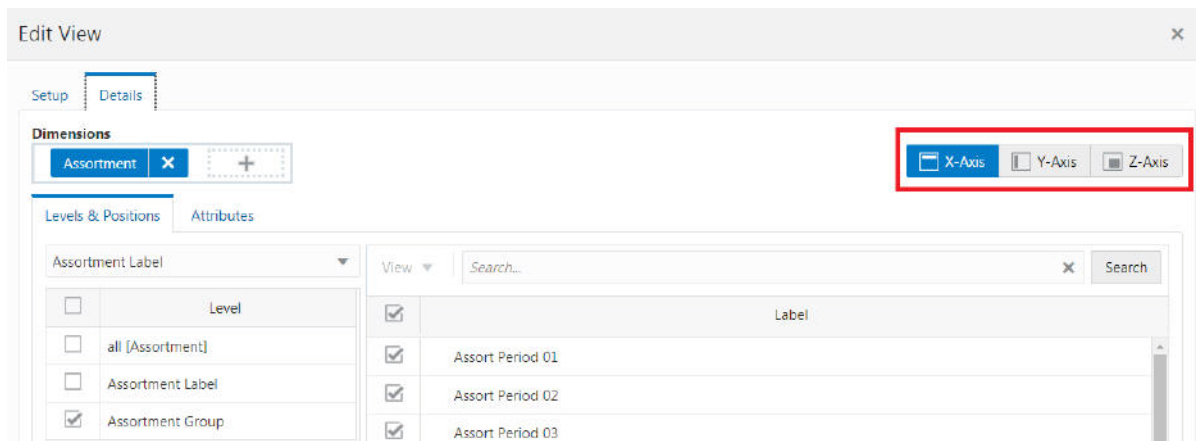
1. Once Edit View is open, click the **Details** tab to see the different dimensions, axes, levels, positions, and measures.

Figure 7-7 Edit View Details

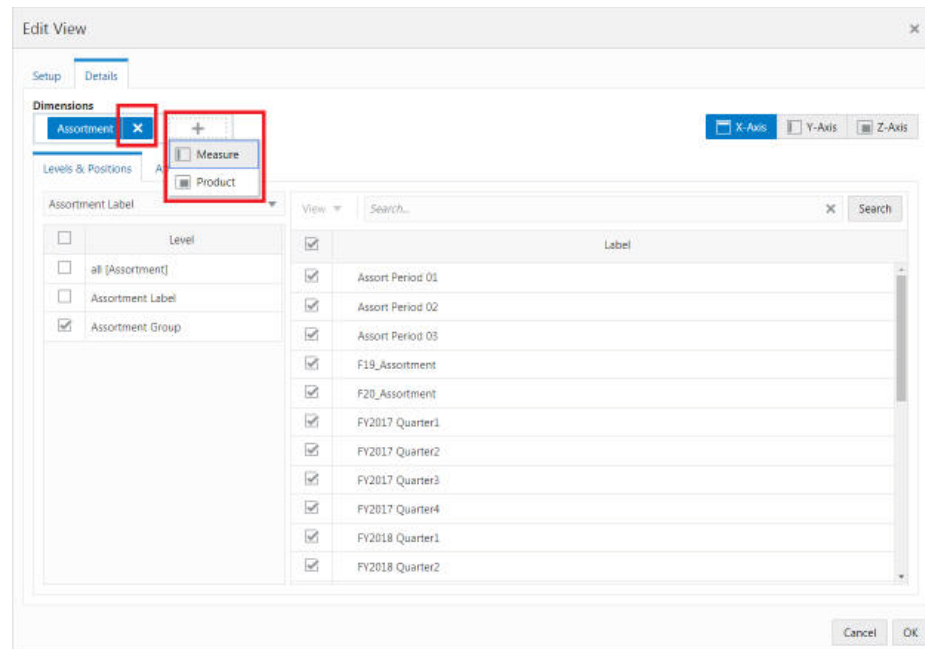


2. To view the contents of each axis, click the different **Axis Toggle** buttons in the top right.

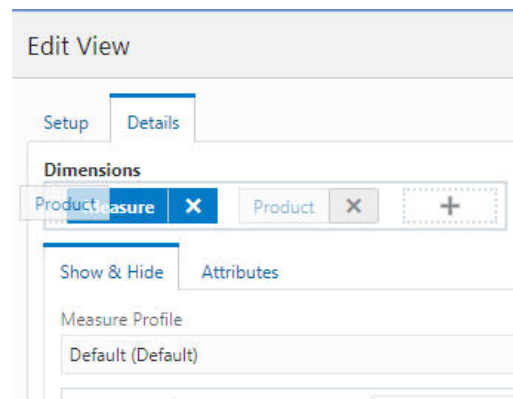
Figure 7-8 Axis Toggle Buttons



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 Add or Remove Dimensions

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

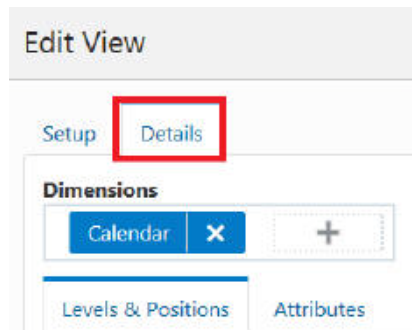
Changing Data Display

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

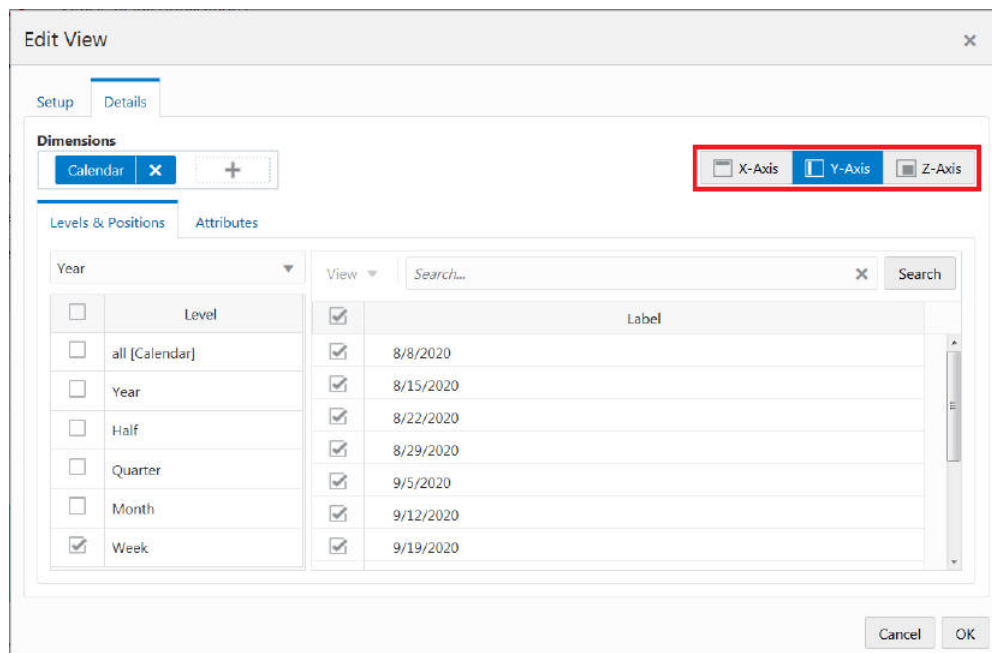
Branch Selection - Alternate Hierarchies

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

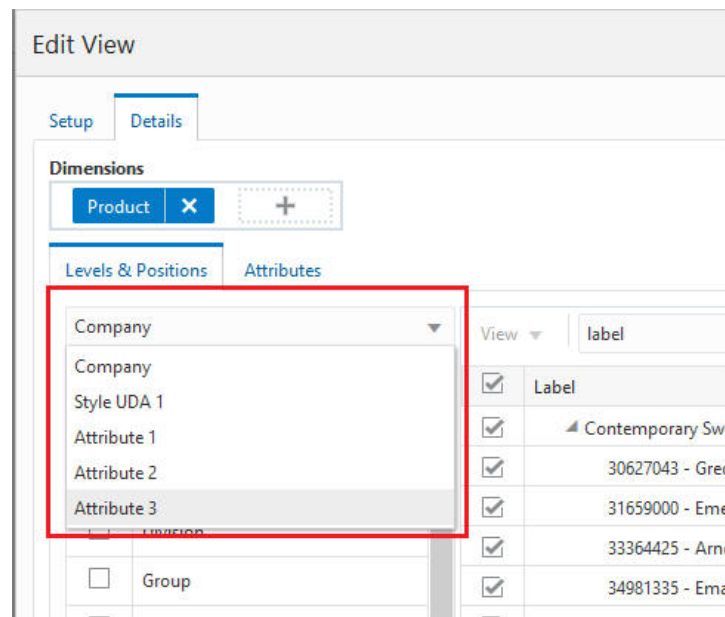
1. Once Edit View is open, click the **Details** tab to see the different dimensions, axes, levels, positions, and measures.

Figure 7–11 Open Details Tab

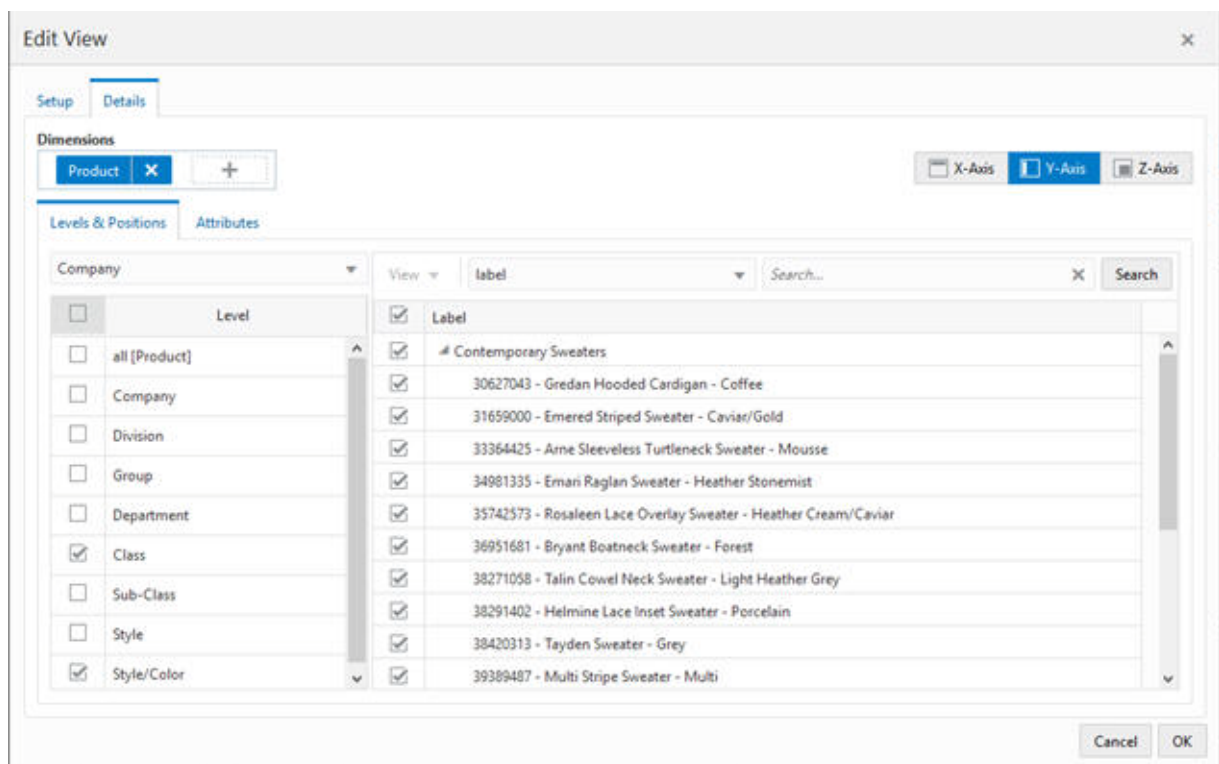
2. To view the contents of each axis, click the different **Axis Toggle** buttons in the top right.

Figure 7–12 Viewing Axis Contents

3. Click the **Branch Selector** list in the Levels and Positions area for the Product dimension to see the different branch options for the Product dimension (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.

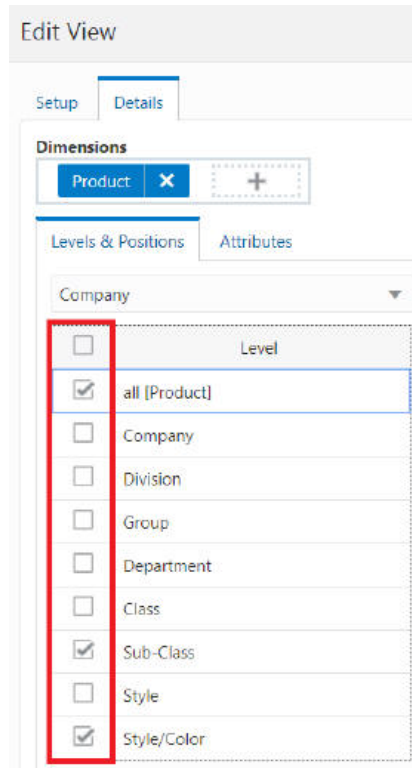
Figure 7–14 Branch Dimension Levels and Positions

Showing and Hiding Levels

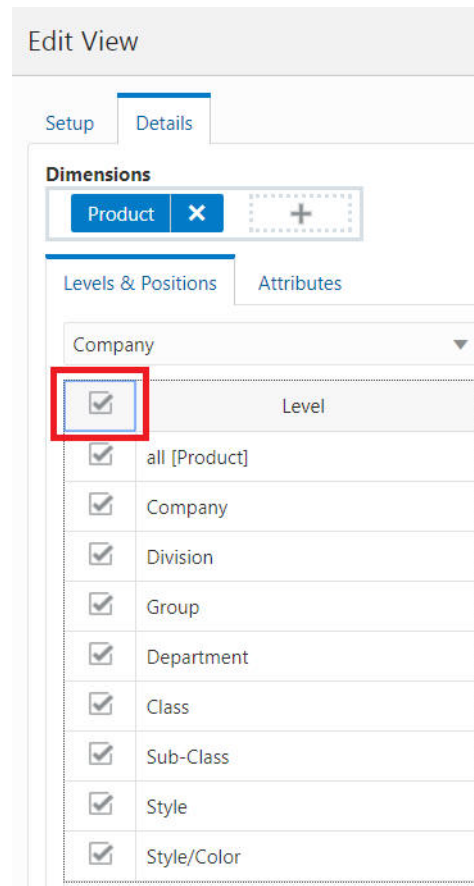
To show or hide levels, complete the following steps:

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.

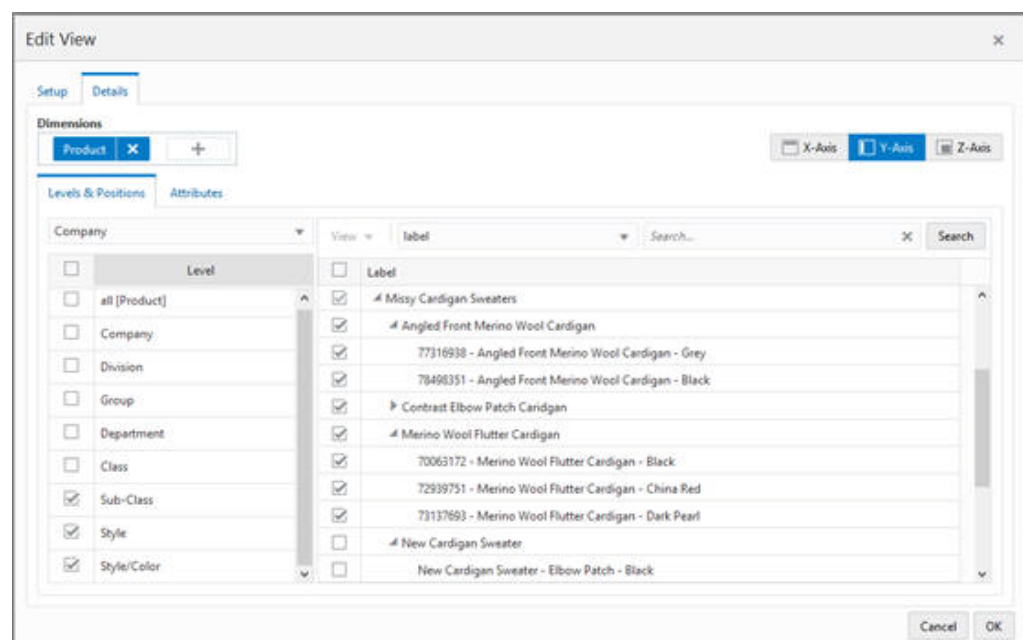
Figure 7–15 Show and Hide Levels



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

Figure 7-16 *Selecting and Deselecting All Levels*

- 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

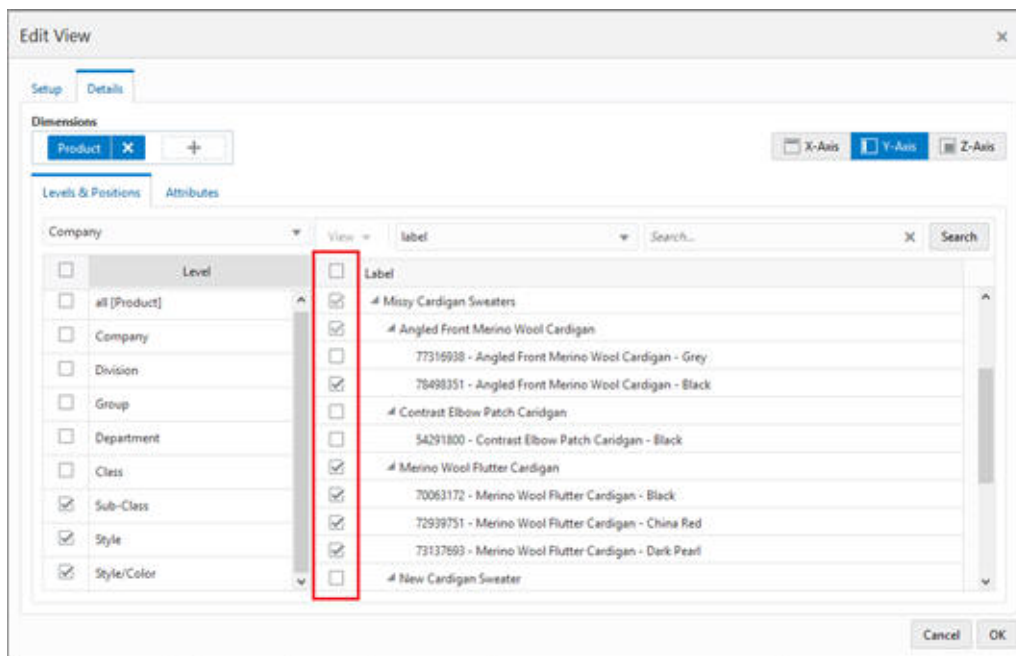
This section provides details about individual data display.

Showing and Hiding Positions

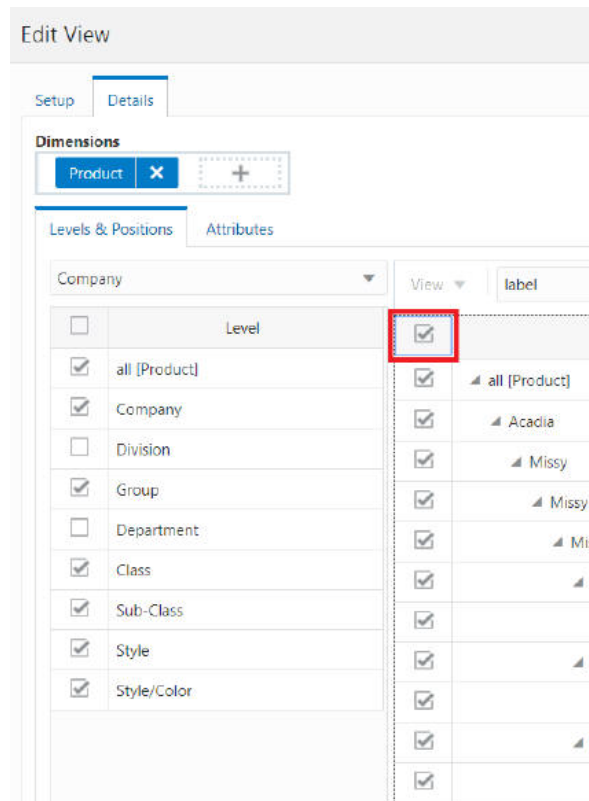
Once Edit View is open to the Details tab, you can show and hide positions in the view. The non-calendar positions are sorted alphabetically by default, based on the Label attribute. The Calendar positions are sorted chronologically.

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

Filtering 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.

Select the required attribute as a filter and search for the positions that have the attribute value you selected. For example, if you select Color as the filter and then select Black from the list, all the positions that have Black as the color attribute value will be listed.

Figure 7–20 Filter Positions (Edit View)

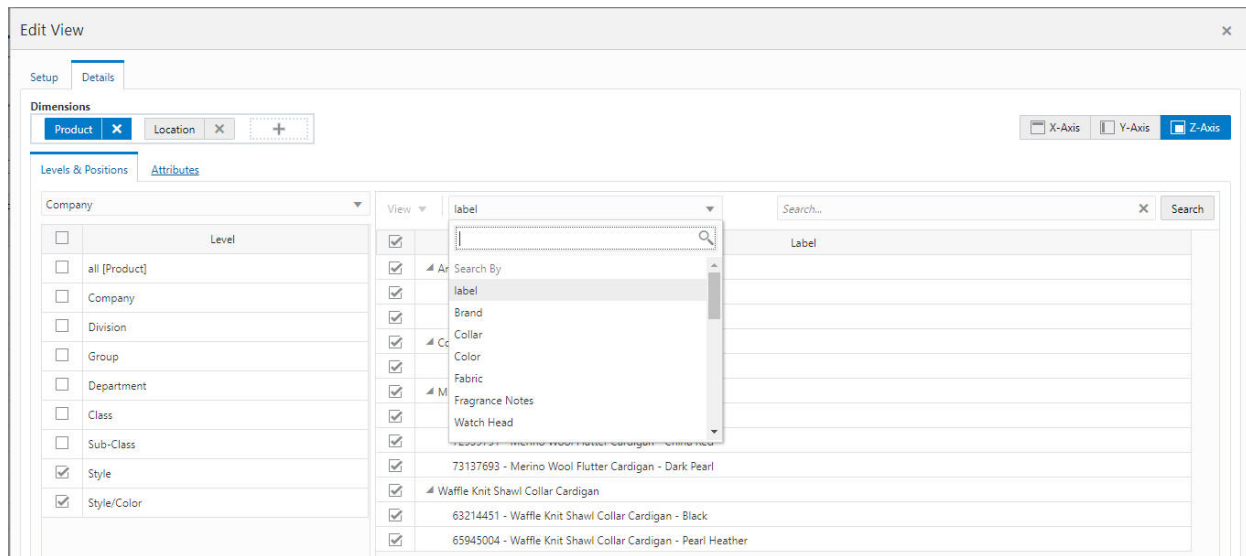
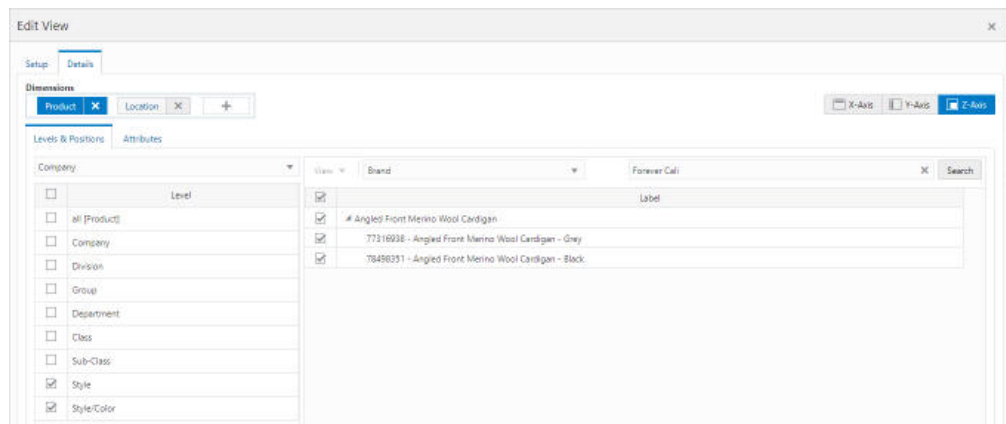


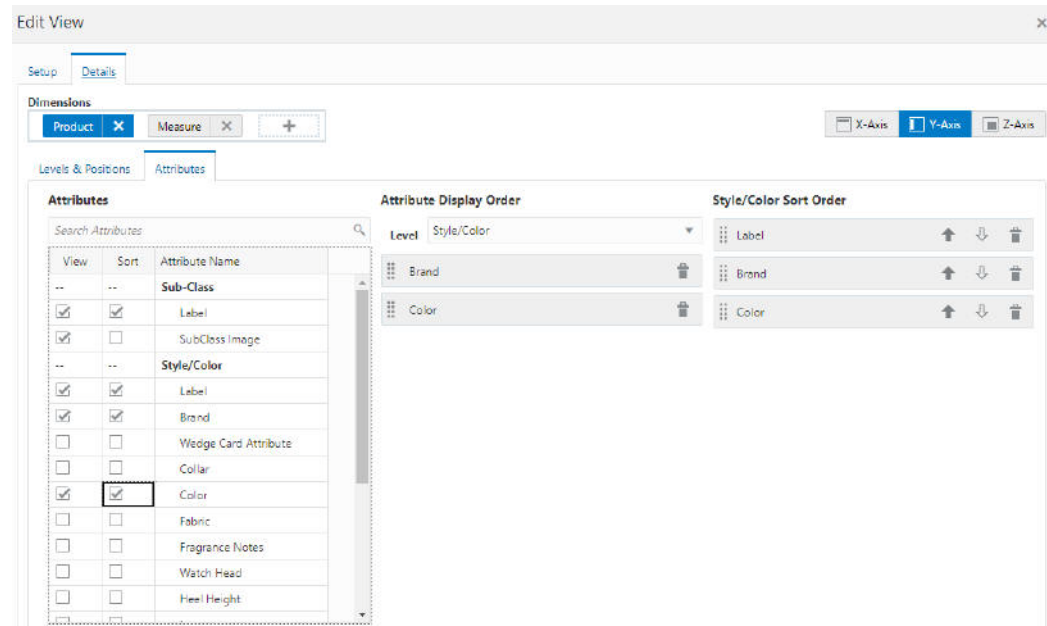
Figure 7–21 Filter Positions by Attribute Example



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 7–22 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.

Viewing New or Updated Attributes

Whenever new or updated item attribute types or attribute values are available in planning, when opening an existing workspace, the planner will receive a snack-bar notification indicating that new or updated attributes are available. As a planner or buyer, you want to be able to filter and sort using new item attributes as soon as they are available in planning. You can use Refresh Attributes in the Action Menu to view the new or updated attributes. You can select the required attributes from the Get New/Updated Attributes list in order to use them in your planning throughout the current workspace. The Get New/Updated option is available in the Action menu on the Quick Access toolbar and in the Attributes tab of Edit View.

Figure 7–23 New or Updated Attribute Notification

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

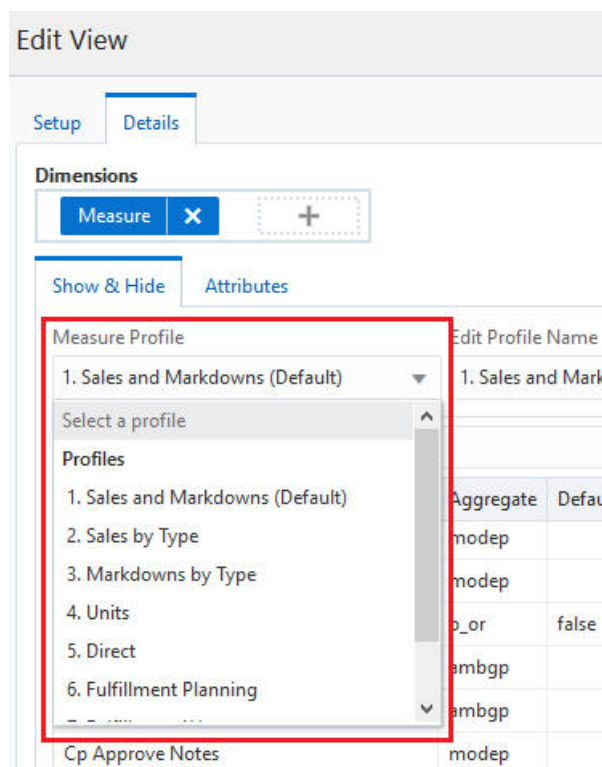
measures as a measure profile and load it into the view. By creating a measure profile for each set of measures that you frequently use, you reduce the amount of time it takes to set up a view.

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

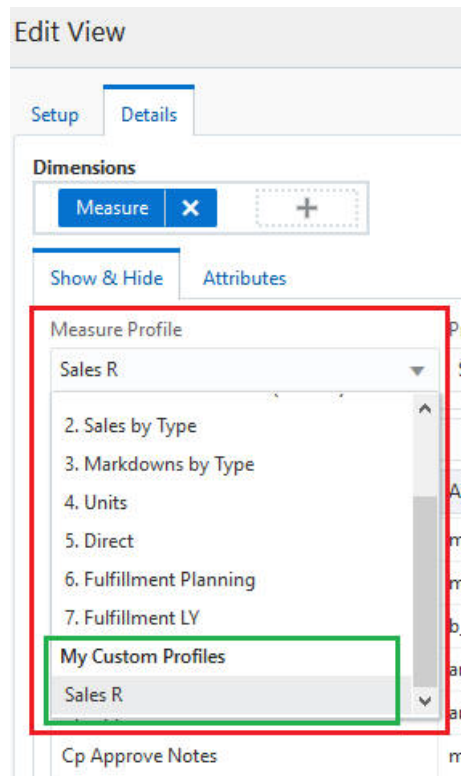
Application-defined measure profiles are configured with the base application and cannot be edited or deleted. If you make a change to the selected measures, the profile cannot be saved as the original profile name, but can be saved with a new name. These profiles are listed in the Profiles list in the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

Figure 7–24 Application-Defined Measure Profile



User-Defined Measure Profiles

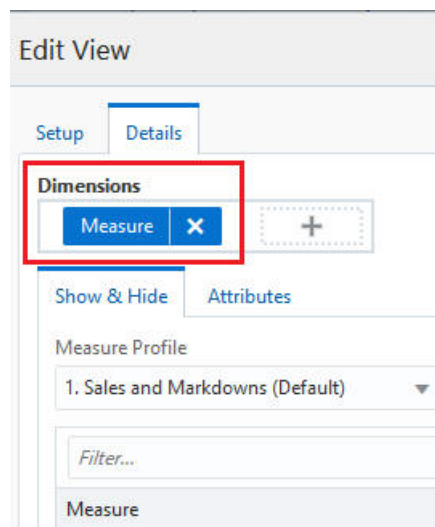
If you generally only work with certain measures, you can create a user-defined measure profile by saving a measure profile. These profiles are usually created by starting with an application-defined or user-defined measure profile, updating the selected measures as needed, and saving the measure profile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

Figure 7–25 User-Defined Measure Profile

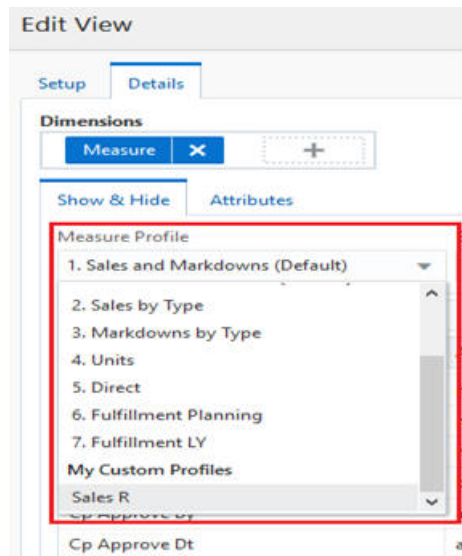
Creating Measure Profiles

To create a measure profile, complete the following steps:

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

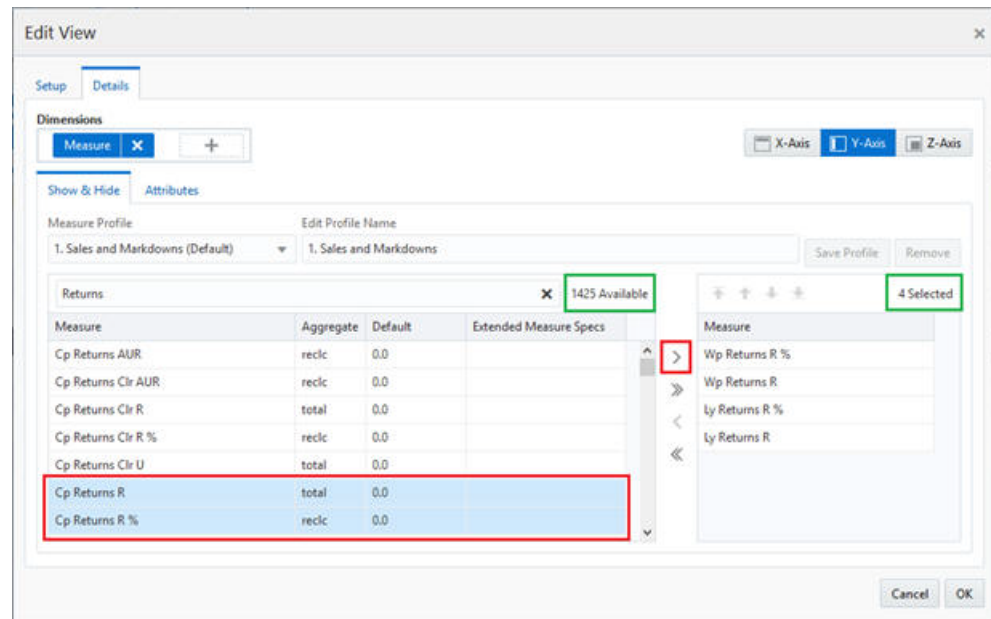
Figure 7–26 Measure Edit View

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

Figure 7-27 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 7–28 Select Measures to Add



4. The total count of the available measures and selected measures is displayed. See Figure 7–28. 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 7-29 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

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 7-30 Selected Measures Added to Selected Measures List

Edit View

Setup Details

Dimensions

Measure [X] +

X-Axis Y-Axis Z-Axis

Show & Hide Attributes

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

Save Profile Remove

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 %

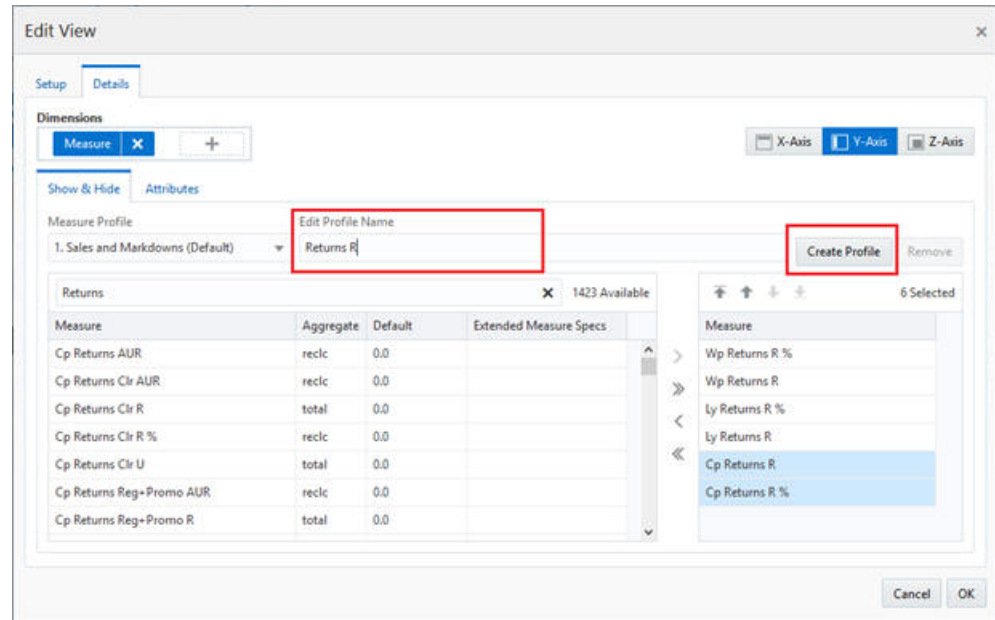
Cancel OK

- If you make changes to the selected list of application-defined measure profiles, the measure profile name will temporarily display *None Selected/Unsaved* until you

create a new profile. In addition, the measure tile will indicate the current measure profile as *unsaved*.

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

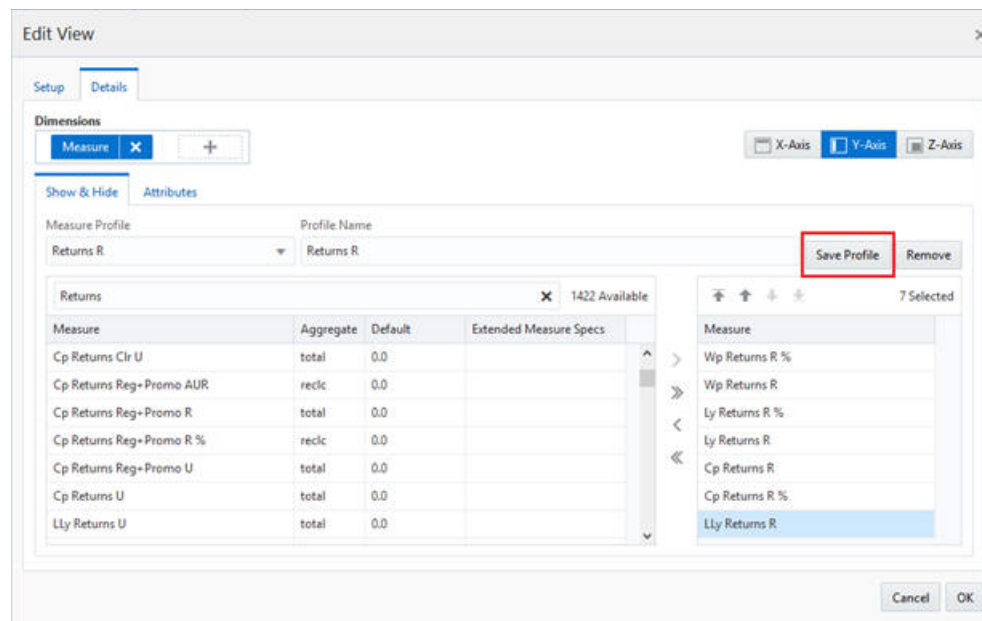
Figure 7–31 Create Profile



Editing and Deleting Measure Profiles

To edit a measure profile, complete the following steps:

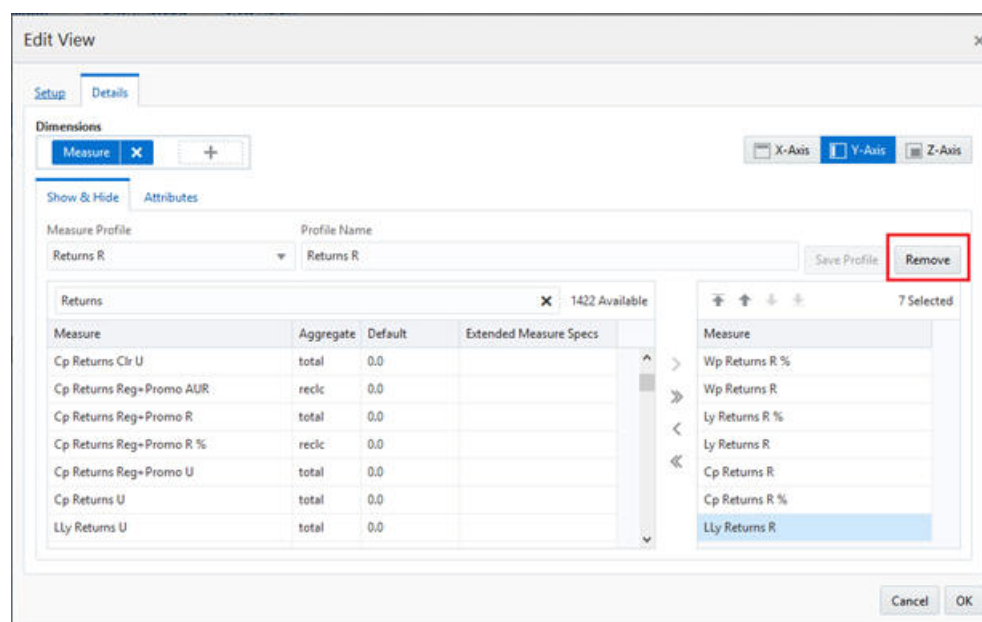
1. Open Edit View and go to the Measures Dimension tile.
2. Select a Custom Measure Profile from the Measure Profile list.
3. Add or remove measures to or from the Selected Measure list.
4. Click **Save Profile**. The measure profile is updated to reflect the selected measures.

Figure 7–32 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 list.
3. Click **Remove**. The measure profile is deleted. You cannot delete a system measure profile.

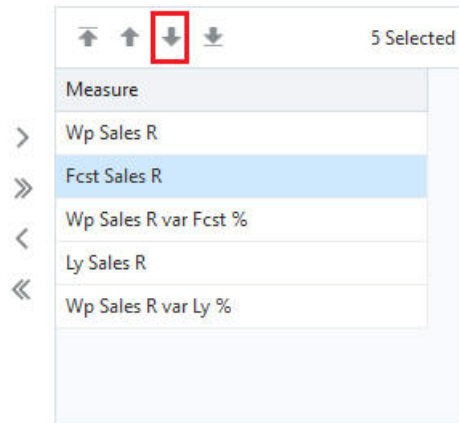
Figure 7–33 Remove Profile

Reordering Measures

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

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

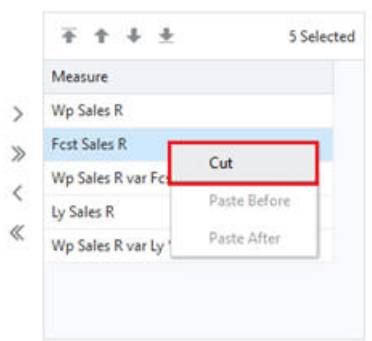
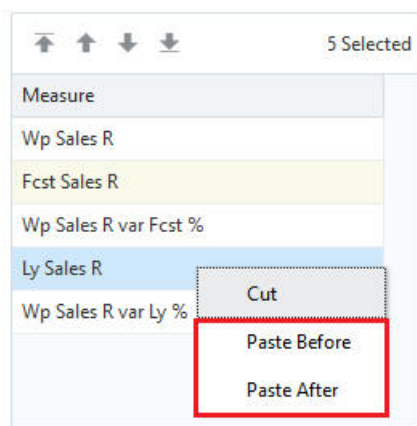
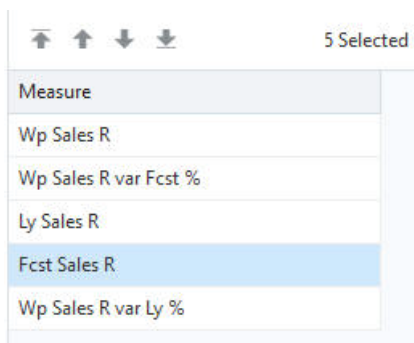
Figure 7–34 Re-Order Measures Using Arrows



- 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 7–35](#) and [Figure 7–36](#), 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 7–35 Re-Order Measures: Cut Selected Measure**Figure 7–36 Re-Order Measure: Paste Selected Measure****Figure 7–37 Re-Order Measure: Results of Paste**

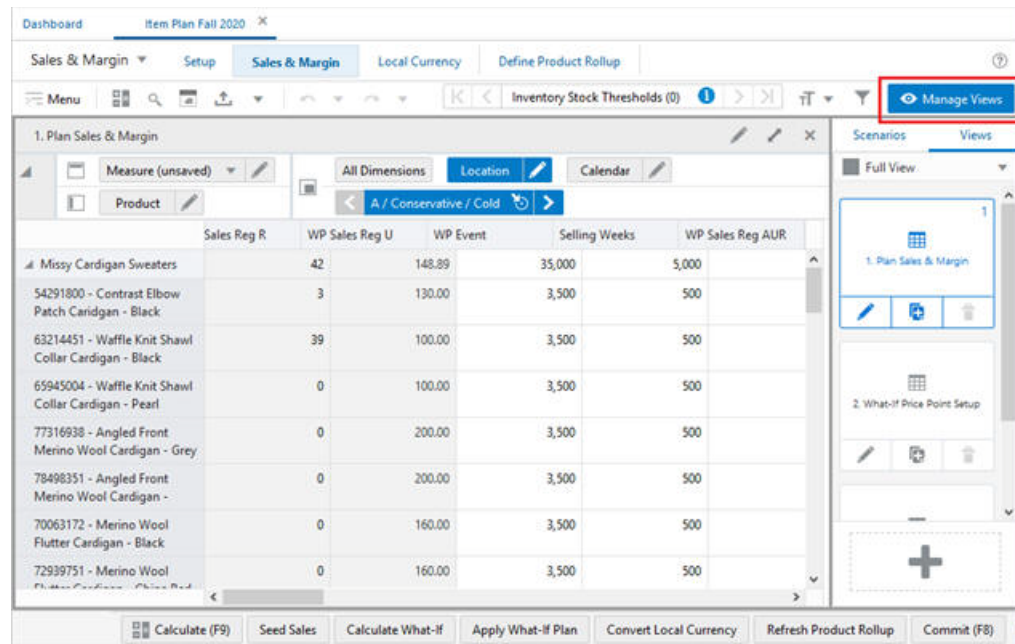
The view area includes the multidimensional pivot table or chart that displays information for the relevant task. Each task may include more than one view, and each view can appear in the contents area. The information in the view is organized based on the dimension positions set up at the *x*, *y*,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

RPAS CE 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 your views in one of the following layouts:

- Full View
- Four-Tile View Layout
- Two Vertical View Layout
- (7:3) Vertical Layout (70:30)
- (3:7) Vertical Layout (30:70)
- Two Horizontal View Layout
- 1 x 2 Vertical Layout
- 2 x 1 Vertical Layout
- 1 x 2 Horizontal Layout
- 1X2 Horizontal (7:3) Layout
- 1X2 Horizontal (3:7) Layout
- 2 x 1 Horizontal Layout
- 2X1 Horizontal (7:3) Layout
- 2X1 Horizontal (3:7) Layout

Click the View Layout list to control the layout.

Figure 8–2 Four-Tile View Layout

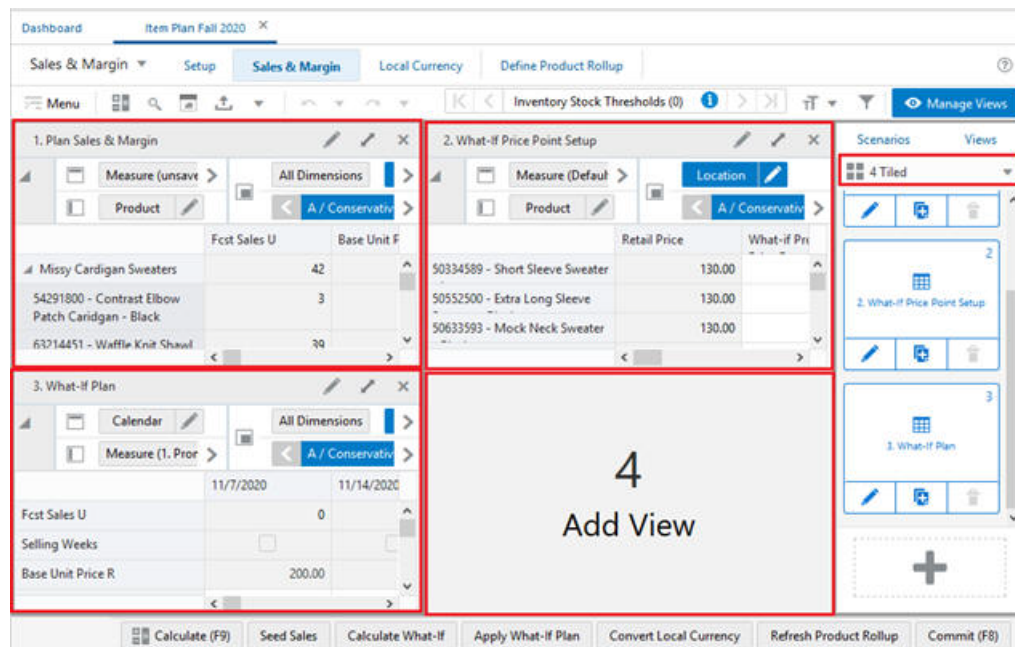


Figure 8–3 Two Vertical View Layout

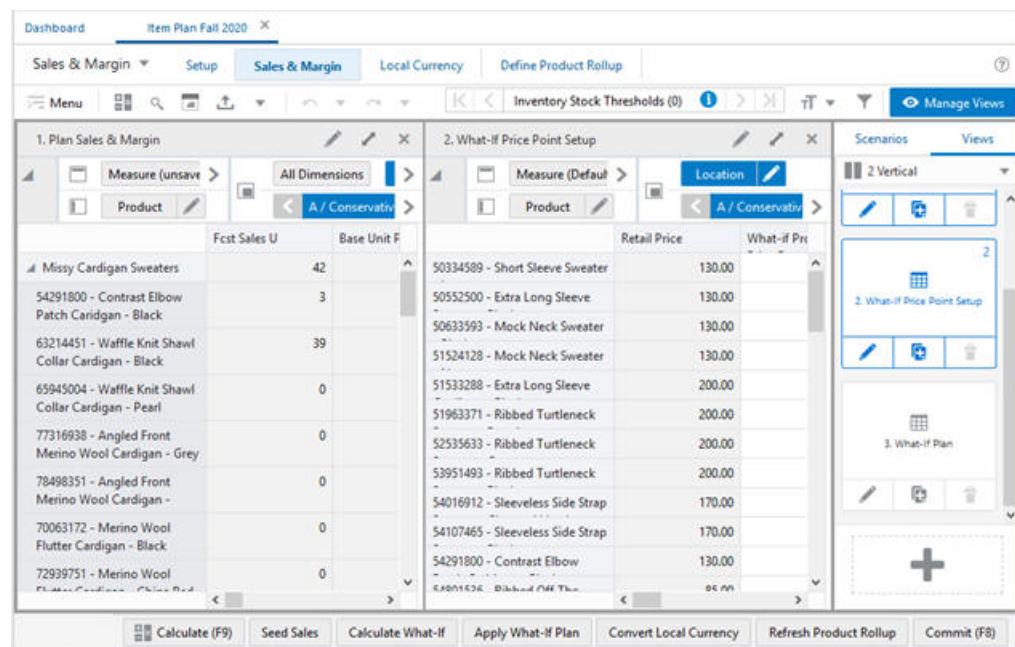


Figure 8–4 (7:3) Vertical Layout (70:30)

1. Plan Sales & Margin

	1/11/2020	1/18/2020	1/25/2020	2/1/2020	2/8/2020	2/15/2020
62768804 - Cowell Neck High	736	736	736	736	736	736
60376507 - Shimmer Sweater -	243	243	243	243	243	243
63214451 - Waffle Knit Shawl	203	203	203	203	203	203
90846443 - Kent Metallic Foil	128	128	128	128	128	128
96666402 - Boat Neck Sequin	51	51	51	51	51	51
56453938 - Cold Shoulder Zip	45	45	45	45	45	45
54801536 - Ribbed Off The	35	35	35	35	35	35
98414472 - Funnel Neck Top -	35	35	35	35	35	35
87319814 - Ruffle Placket	33	33	33	33	33	33
93402304 - Boat Neck	31	31	31	31	31	31
90710567 - Leopard Print Bow	29	29	29	29	29	29
83544636 - Silk Pullover Blouse	29	29	29	29	29	29
83256665 - Silk Pullover Blouse	21	21	21	21	21	21
51524128 - Mock Neck Sweater	18	18	18	18	18	18

2. What-If Price Point Setup

	Retail Price	What-If Price R
50334589 - Short Sleeve	130.00	
50552500 - Extra Long Sleeve	130.00	
50633593 - Mock Neck Sweater	130.00	
51524128 - Mock Neck Sweater	130.00	
51533288 - Extra Long Sleeve	200.00	
51963371 - Ribbed Turtleneck	200.00	
52535633 - Ribbed Turtleneck	200.00	
53951493 - Ribbed Turtleneck	200.00	
54016912 - Sleeveless Side	170.00	
54107465 - Sleeveless Side	170.00	
54291800 - Contrast Elbow	130.00	
54801536 - Ribbed Off The	85.00	
56158288 - Ribbed Off The	85.00	
56226577 - Ribbed Off The	85.00	

Scenarios

- 7:3 Vertical
 - 1. Plan Sales & Margin
 - 2. What-If Price Point Setup

Figure 8–5 (3:7) Vertical Layout (30:70)

1. Plan Sales & Margin

	1/11/2020	1/18/2020
62768804 - Cowell Neck High	736	
60376507 - Shimmer Sweater -	243	
63214451 - Waffle Knit Shawl	203	
90846443 - Kent Metallic Foil	128	
96666402 - Boat Neck Sequin	51	
56453938 - Cold Shoulder Zip	45	
54801536 - Ribbed Off The	35	
98414472 - Funnel Neck Top -	35	
87319814 - Ruffle Placket	33	
93402304 - Boat Neck	31	
90710567 - Leopard Print Bow	29	
83544636 - Silk Pullover Blouse	29	
83256665 - Silk Pullover Blouse	21	
51524128 - Mock Neck Sweater	18	

2. What-If Price Point Setup

	Retail Price	What-If Promo Price R	What-If Promo Price Disc %	What-If Promo Sales Lift %	What-If Cr Price R	What-If Cr Price Disc %
50334589 - Short Sleeve	130.00	0.00	0.0%	0.0%	0.00	0.0%
50552500 - Extra Long Sleeve	130.00	0.00	0.0%	0.0%	0.00	0.0%
50633593 - Mock Neck Sweater	130.00	0.00	0.0%	0.0%	0.00	0.0%
51524128 - Mock Neck Sweater	130.00	0.00	0.0%	0.0%	0.00	0.0%
51533288 - Extra Long Sleeve	200.00	0.00	0.0%	0.0%	0.00	0.0%
51963371 - Ribbed Turtleneck	200.00	0.00	0.0%	0.0%	0.00	0.0%
52535633 - Ribbed Turtleneck	200.00	0.00	0.0%	0.0%	0.00	0.0%
53951493 - Ribbed Turtleneck	200.00	0.00	0.0%	0.0%	0.00	0.0%
54016912 - Sleeveless Side	170.00	0.00	0.0%	0.0%	0.00	0.0%
54107465 - Sleeveless Side	170.00	0.00	0.0%	0.0%	0.00	0.0%
54291800 - Contrast Elbow	130.00	0.00	0.0%	0.0%	0.00	0.0%
54801536 - Ribbed Off The	85.00	0.00	0.0%	0.0%	0.00	0.0%
56158288 - Ribbed Off The	85.00	0.00	0.0%	0.0%	0.00	0.0%
56226577 - Ribbed Off The	85.00	0.00	0.0%	0.0%	0.00	0.0%

Scenarios

- 3:7 Vertical
 - 1. Plan Sales & Margin
 - 2. What-If Price Point Setup

Figure 8–6 Two Horizontal View Layout

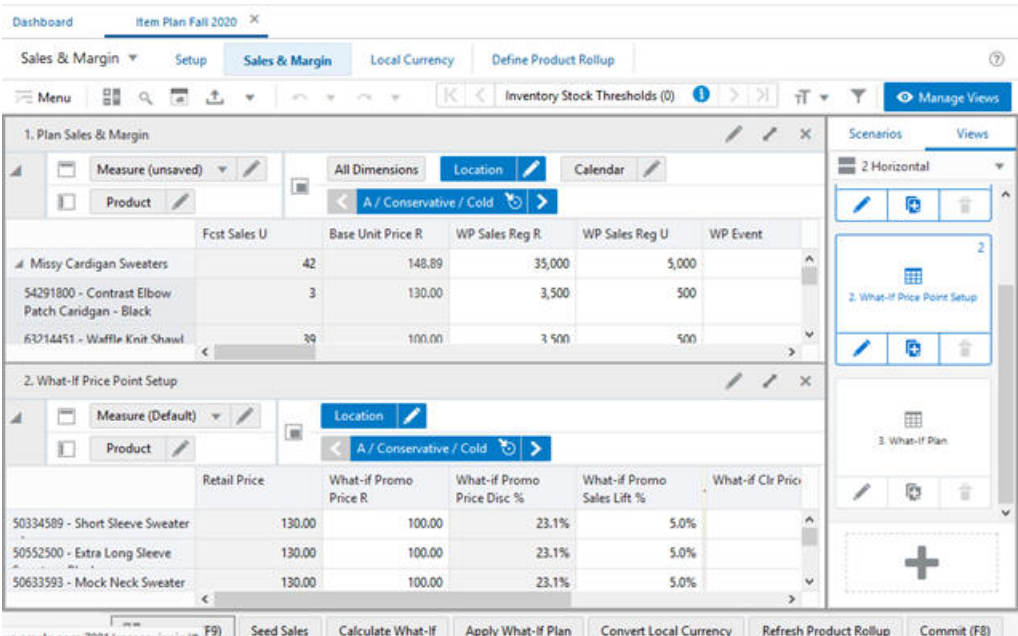


Figure 8–7 1 x 2 Vertical Layout

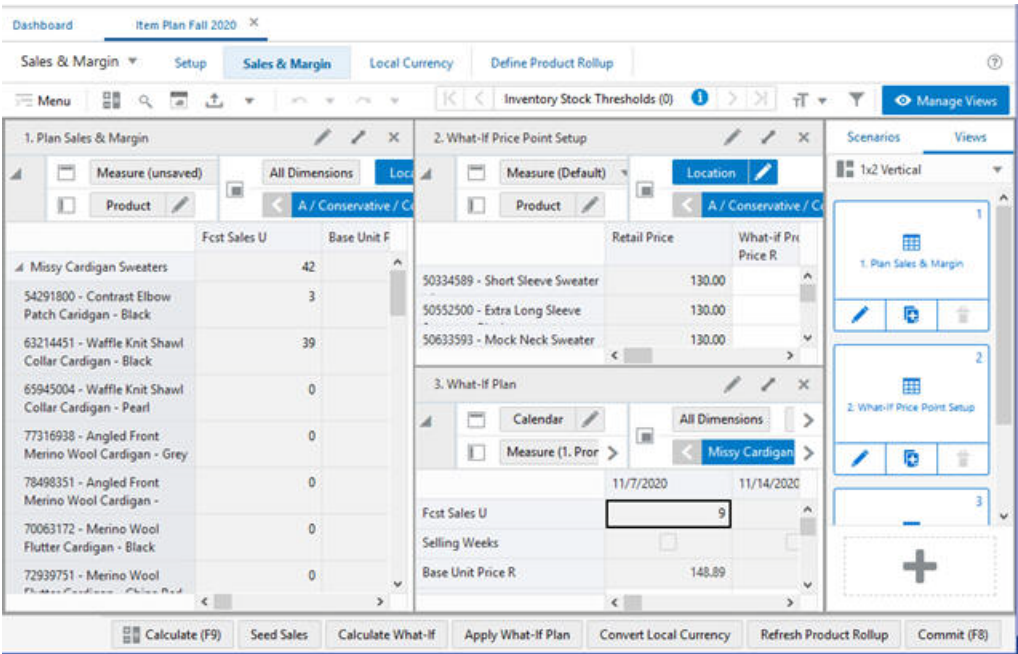


Figure 8–8 2 x 1 Vertical Layout

Dashboard Item Plan Fall 2020

Sales & Margin Setup Sales & Margin Local Currency Define Product Rollup

Menu Inventory Stock Thresholds (0) Manage Views

1. Plan Sales & Margin

Measure (unsaved) All Dimensions

Product A / Conservative

	Fcst Sales U	Base Unit F
Missy Cardigan Sweaters	42	
54291800 - Contrast Elbow Patch Cardigan - Black	3	
63214451 - Waffle Knit Shawl	39	

2. What-If Price Point Setup

Measure (Default) Location

Product A / Conservative

	Retail Price	What-if Price R
50334589 - Short Sleeve Sweater	130.00	
50552500 - Extra Long Sleeve	130.00	
50633593 - Mock Neck Sweater	130.00	

3. What-If Plan

Calendar Measure (1. Pror) Missy Cardigan

	11/7/2020	11/14/2020
Fcst Sales U	9	
Selling Weeks		
Base Unit Price R	148.89	
WP Event		
WP Apply What-if Promo Plan	<input checked="" type="checkbox"/>	
What-if Promo Event	Fall Promotion	
What-if Apply Price Point		
WP Sales Reg U	100	
WP Sales Reg R	100	
WP Sales Reg AUR	1.00	
What-if Promo Disc %	0.0%	

Scenarios Views

2x1 Vertical

1. Plan Sales & Margin

2. What-if Price Point Setup

3. What-If Plan

Calculate (F9) Seed Sales Calculate What-If Apply What-If Plan Convert Local Currency Refresh Product Rollup Commit (F8)

Figure 8–9 1 x 2 Horizontal Layout

Dashboard Item Plan Fall 2020

Sales & Margin Setup Sales & Margin Local Currency Define Product Rollup

Menu Inventory Stock Thresholds (0) Manage Views

1. Plan Sales & Margin

Measure (unsaved) All Dimensions Location Calendar

Product A / Conservative / Cold

	Fcst Sales U	Base Unit Price R	WP Sales Reg R	WP Sales Reg U	WP Event
Missy Cardigan Sweaters	42	148.89	35,000	5,000	
54291800 - Contrast Elbow Patch Cardigan - Black	3	130.00	3,500	500	
63214451 - Waffle Knit Shawl	39	100.00	1,500	500	

3. What-If Plan

Calendar Measure (1. Pror) Missy Cardigan

	11/7/2020	11/14/2020
Fcst Sales U	9	
Selling Weeks		
Base Unit Price R	148.89	

2. What-If Price Point Setup

Measure (Default) Location

Product A / Conservative

	Retail Price	What-if Price R
50334589 - Short Sleeve Sweater	130.00	
50552500 - Extra Long Sleeve	130.00	
50633593 - Mock Neck Sweater	130.00	

Scenarios Views

1x2 Horizontal

1. Plan Sales & Margin

2. What-if Price Point Setup

3. What-If Plan

Calculate (F9) Seed Sales Calculate What-If Apply What-If Plan Convert Local Currency Refresh Product Rollup Commit (F8)

Figure 8–10 1X2 Horizontal (7:3) Layout

Dashboard Item Plan Fall 2020

Sales & Margin Seed Plan Sales & Margin Reconcile to MFP Define Product Rollup

Menu Inventory Stock Thresholds (0) Manage Views

1. Plan Sales & Margin

Calendar All Dimensions Location Measure (Default)

Brick & Mortar_US / Cold Fcst Sales U

	1/11/2020	1/18/2020	1/25/2020	2/1/2020	2/8/2020	2/15/2020
62768804 - Cowel Neck High	736	736	736	736	736	736
60376507 - Shimmer Sweater -	243	243	243	243	243	243
63214451 - Waffle Knit Shawl	203	203	203	203	203	203
90846443 - Kent Metallic Foil	128	128	128	128	128	128
96666402 - Boat Neck Sequin	51	51	51	51	51	51

3. What-If Plan

Calendar All Dimensions Location Product

Brick & Mortar_US / Cold 50334589 - Short Sleeve Sweater - Lacquer

	1/11/2020	1/18/2020	1/25/2020	2/1/2020	2/8/2020	2/15/2020
Fcst Sales U	0	0	0	0	0	0
Base Unit Price R	130.00	130.00	130.00	130.00	130.00	130.00
WP Event						
WP Apply What-If Markdown	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
What-if Markknown Front						

2. What-If Price Point Setup

Measure (Default) Location

Brick & Mortar

	Retail Price
50334589 - Short Sleeve	130.00
50552500 - Extra Long Sleeve	130.00
50633593 - Mock Neck Sweater	130.00
51524128 - Mock Neck Sweater	130.00

Scenarios Views

1x2 Horizontal (7:3)

1. Plan Sales & Margin

1. Plan Sales & Margin Bar Chart

2. What-If Price Point Setup

Figure 8–11 1X2 Horizontal (3:7) Layout

Dashboard Item Plan Fall 2020

Sales & Margin Seed Plan Sales & Margin Reconcile to MFP Define Product Rollup

Menu Inventory Stock Thresholds (0) Manage Views

1. Plan Sales & Margin

Calendar All Dimensions Location Measure (Default)

Brick & Mortar_US / Cold Fcst Sales U

	1/11/2020	1/18/2020	1/25/2020	2/1/2020	2/8/2020	2/15/2020
62768804 - Cowel Neck High	736	736	736	736	736	736
60376507 - Shimmer Sweater -	243	243	243	243	243	243
63214451 - Waffle Knit Shawl	203	203	203	203	203	203
90846443 - Kent Metallic Foil	128	128	128	128	128	128
96666402 - Boat Neck Sequin	51	51	51	51	51	51

3. What-If Plan

Calendar All Dimensions Location Product

Brick & Mortar_US / Cold

	1/11/2020	1/18/2020
Fcst Sales U	0	
Base Unit Price R	130.00	
WP Event		
WP Apply What-If Markdown	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
What-if Markknown Front		

2. What-If Price Point Setup

Measure (Default) Location

Brick & Mortar_US / Cold

	Retail Price	What-if Promo Price R	What-if Promo Price Disc %	What-if Promo Sales Lift %	What-if Ctr Price R	What-if Ctr Price Disc %
50334589 - Short Sleeve	130.00	0.00	0.0 %	0.0 %	0.00	0.0 %
50552500 - Extra Long Sleeve	130.00	0.00	0.0 %	0.0 %	0.00	0.0 %
50633593 - Mock Neck Sweater	130.00	0.00	0.0 %	0.0 %	0.00	0.0 %
51524128 - Mock Neck Sweater	130.00	0.00	0.0 %	0.0 %	0.00	0.0 %

Scenarios Views

1x2 Horizontal (3:7)

1. Plan Sales & Margin

1. Plan Sales & Margin Bar Chart

2. What-If Price Point Setup

Figure 8–12 2 x 1 Horizontal Layout

1. Plan Sales & Margin

Product	Fcst Sales U	Base Unit F
Missy Cardigan Sweaters	42	
54291800 - Contrast Elbow Patch Cardigan - Black	3	
63214451 - Waffle Knit Shawl	39	

2. What-If Price Point Setup

Product	Retail Price	What-if Price R
50334589 - Short Sleeve Sweater	130.00	
50552500 - Extra Long Sleeve	130.00	
50633593 - Mock Neck Sweater	130.00	

3. What-If Plan

	11/7/2020	11/14/2020	11/21/2020	11/28/2020	12/5/2020
Fcst Sales U	9	9	9	9	9
Selling Weeks					
Base Unit Price R	148.89	148.89	148.89	148.89	14

Buttons: Calculate (F9), Seed Sales, Calculate What-If, Apply What-If Plan, Convert Local Currency, Refresh Product Rollup, Commit (F8)

Figure 8–13 2X1 Horizontal (7:3) Layout

1. Plan Sales & Margin

Product	1/11/2020	1/18/2020	1/25/2020	2/1/2020	2/8/2020	2/15/2020
62768804 - Cowell Neck High	736	736	736	736	736	7
60376507 - Shimmer Sweater -	243	243	243	243	243	2
63214451 - Waffle Knit Shawl	203	203	203	203	203	2
90846443 - Kent Metallic Foil	128	128	128	128	128	1
96666407 - Brat Neck Cardigan	51	51	51	51	51	1

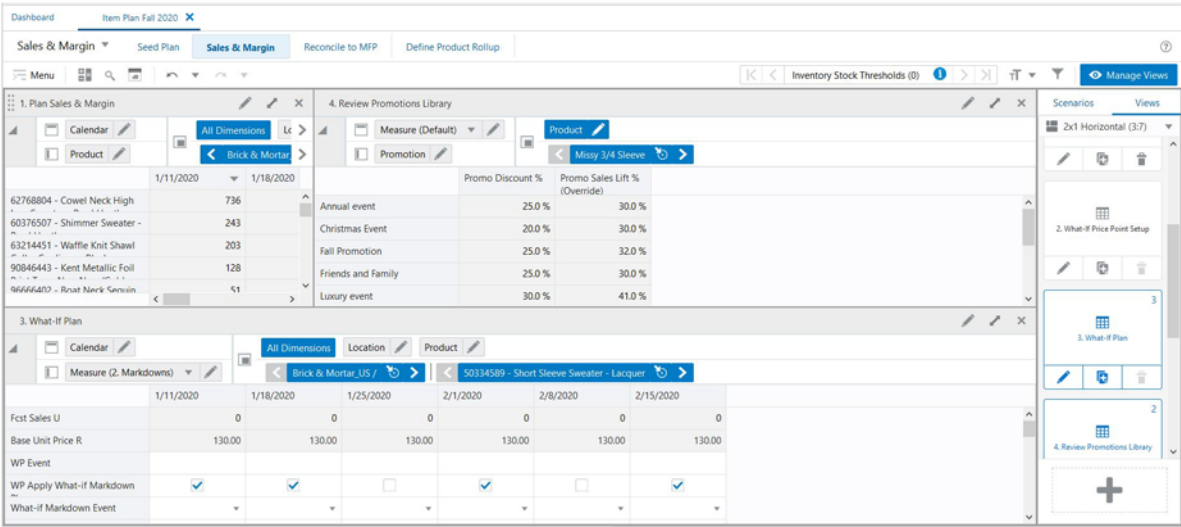
2. What-If Plan

	1/11/2020	1/18/2020	1/25/2020	2/1/2020	2/8/2020	2/15/2020
Fcst Sales U	0	0	0	0	0	0
Base Unit Price R	130.00	130.00	130.00	130.00	130.00	130.00
WP Event						
WP Apply What-If Markdown	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
What-if Markdown Event						

4. Review Promotions Library

Promotion	Promo Discount %	Promo Sale
Annual event	25.0 %	
Christmas Event	20.0 %	
Fall Promotion	25.0 %	
Friends and Family	25.0 %	
Friends event	30.0 %	

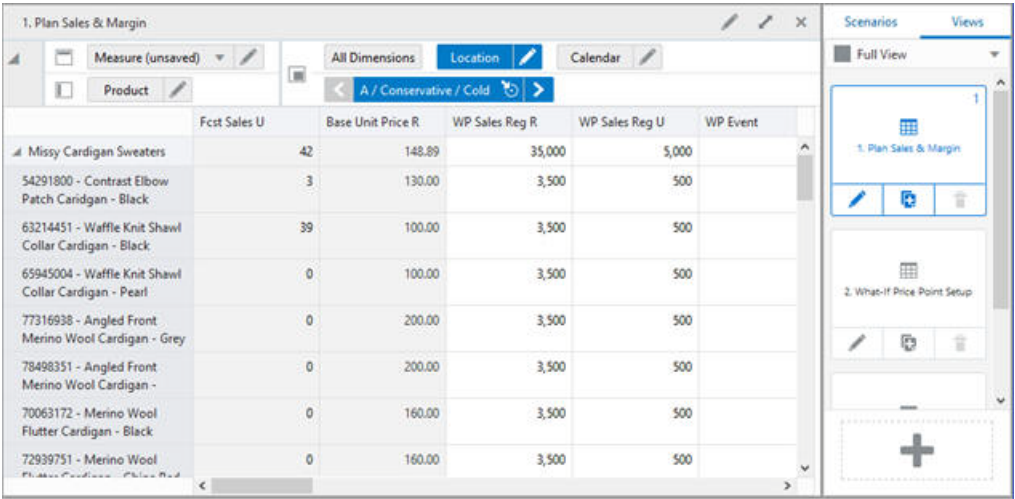
Figure 8–14 2X1 Horizontal (3:7) Layout



View List

The available views are listed on the right side of the screen in the View Management Drawer, as shown in [Figure 8–15](#).

Figure 8–15 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 8–16 Creating a View

Product	Fcst Sales U	Base Unit Price R	WP Sales Reg R	WP Sales Reg U	WP Event
Missy Cardigan Sweaters	42	148.89	35,000	5,000	
54291800 - Contrast Elbow Patch Cardigan - Black	3	130.00	3,500	500	
63214451 - Waffle Knit Shawl Collar Cardigan - Black	39	100.00	3,500	500	
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl	0	100.00	3,500	500	
77316938 - Angled Front Merino Wool Cardigan - Grey	0	200.00	3,500	500	
78498351 - Angled Front Merino Wool Cardigan -	0	200.00	3,500	500	
70063172 - Merino Wool Flutter Cardigan - Black	0	160.00	3,500	500	
72939751 - Merino Wool	0	160.00	3,500	500	

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

Figure 8–17 Edit View Setup Options

Edit View

Setup Details

Source *

Select a source

- 4. Review Promotions Library
- 5. Review Markdowns Library
- 1. Plan Sales & Margin
- 3. What-If Plan
- 2. What-If Price Point Setup

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

Figure 8–18 Display Name

The screenshot shows the 'Edit View' dialog box with the 'Setup' tab selected. The 'Source' dropdown is set to '4. Review Promotions Library'. The 'Display Name' field, which is highlighted with a red rectangle, contains the text 'Rev'. The 'View Type' dropdown is set to 'Pivot Table'.

Edit View

Setup Details

Source *

4. Review Promotions Library ▼

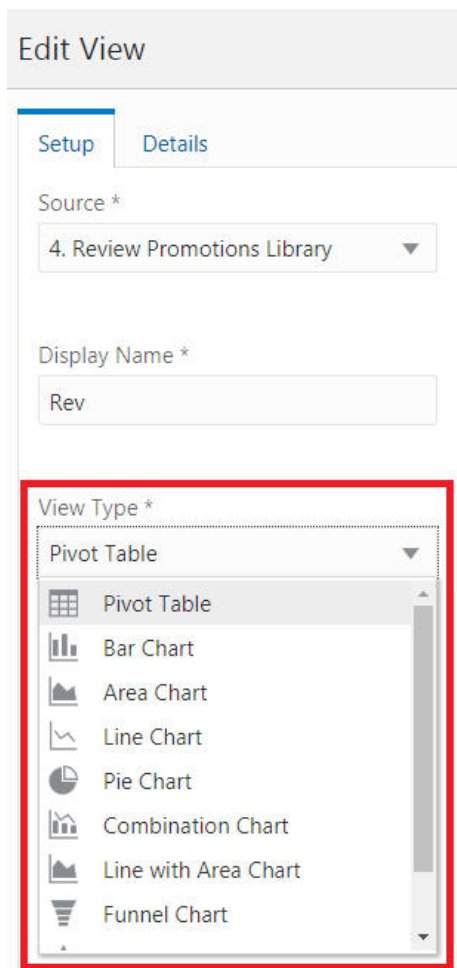
Display Name *

Rev

View Type *

Pivot Table ▼

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

Figure 8–19 Type of View


Edit View

Setup Details

Source *

4. Review Promotions Library ▼

Display Name *

Rev

View Type *

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

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

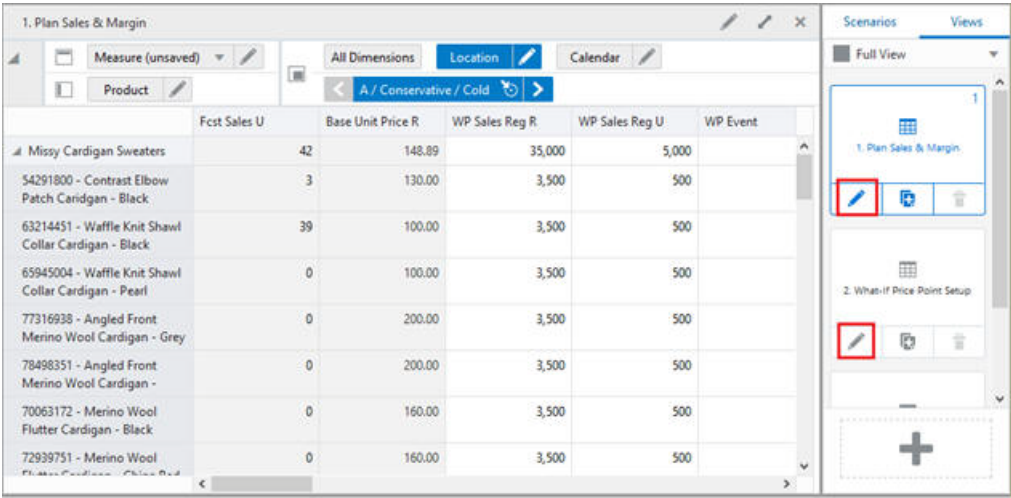
For more information on how to perform above steps, see [Chapter 7, "Editing Views."](#)

Modifying a View

To modify a view, complete the following steps:

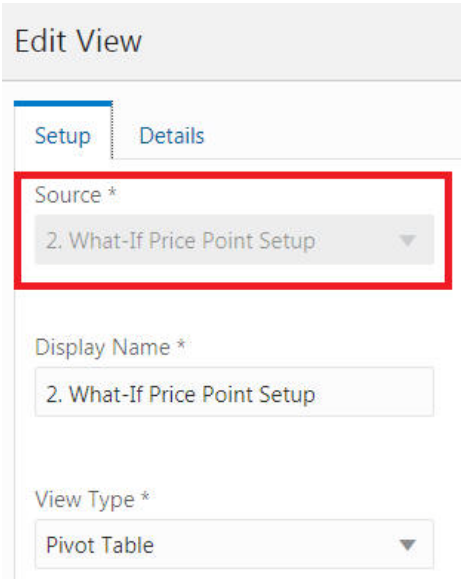
1. Click the **Edit view** icon on the View tile in the View Management Drawer.

Figure 8–20 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 list is unavailable.

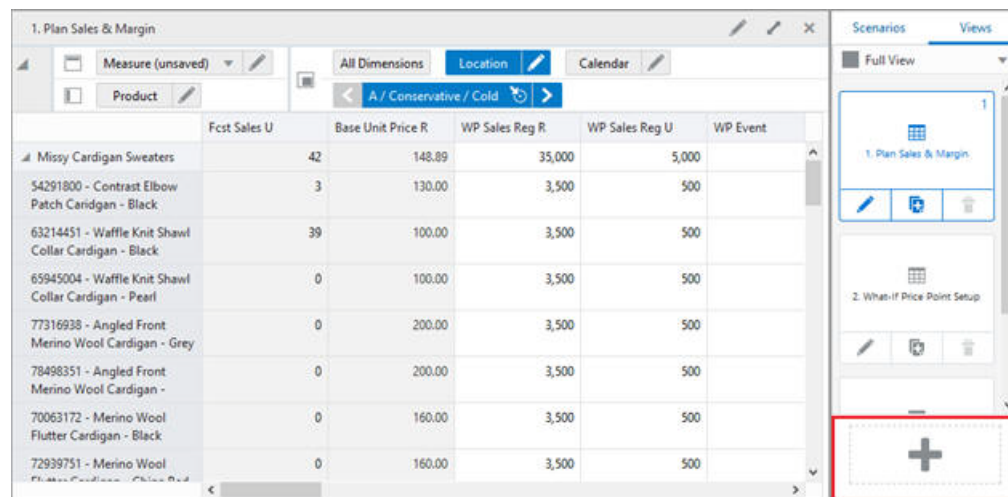
Figure 8–21 Edit View > Source (unavailable)



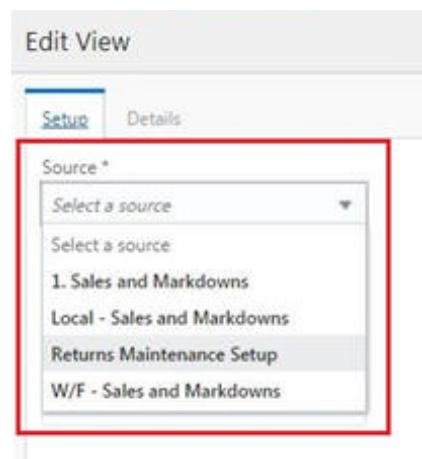
Copying a View

To make a copy or a duplicate of a view, you can click the Duplicate View icon on the View tile in the View Management Drawer. It creates a duplicate of the view with the Display name of View Name> Copy 1.You can create a new view and use the original view as the source.

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

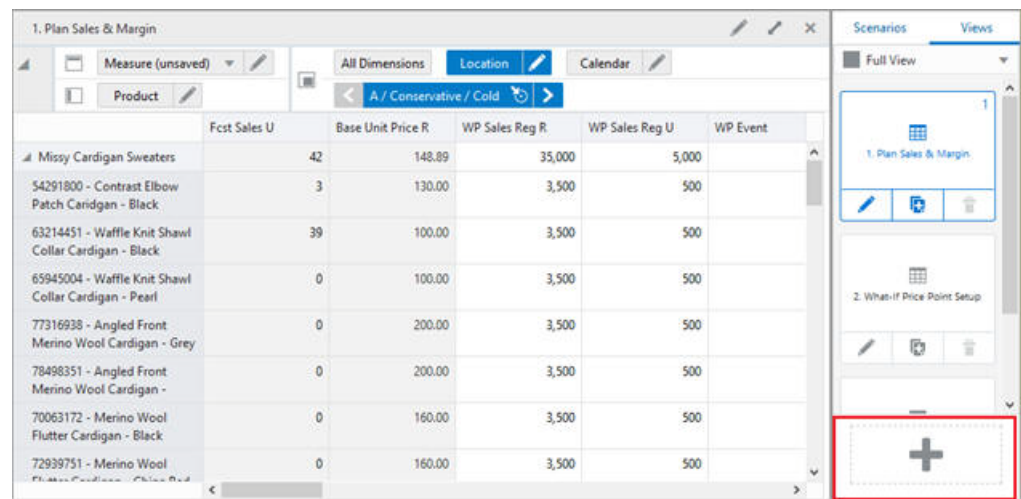
Figure 8–22 Copying a View

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

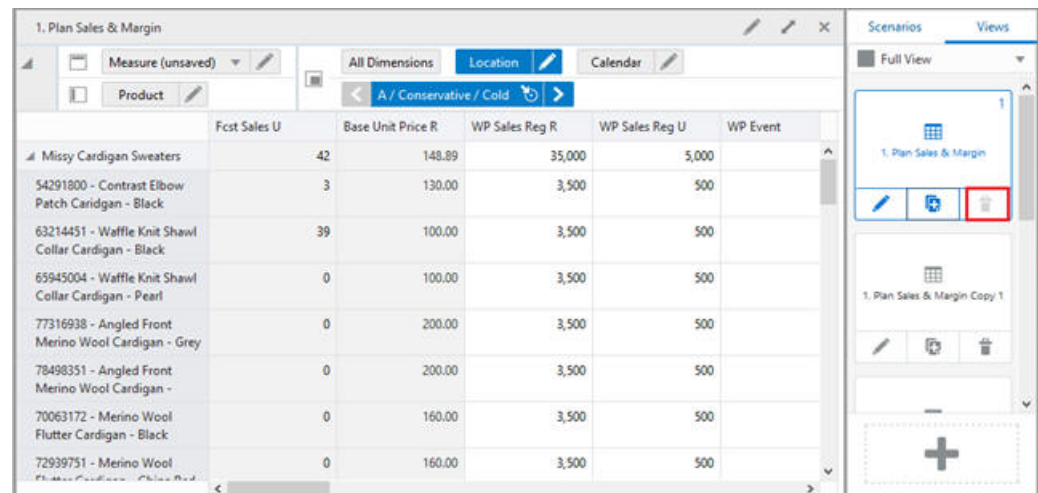
Figure 8–23 Selecting a View

Deleting a View

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

Figure 8–24 Deleting a View

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

Figure 8–25 Disabled Delete Option

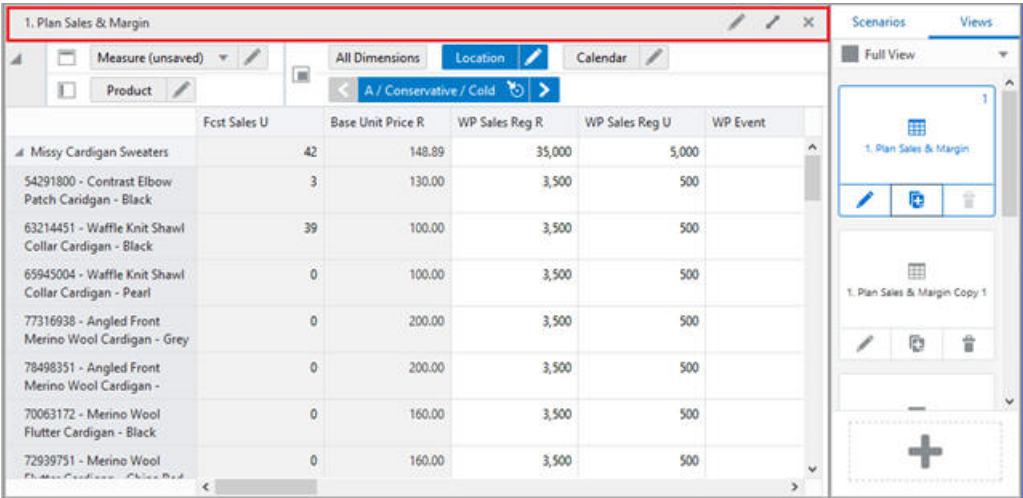
Working with Views

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

View Title Bar

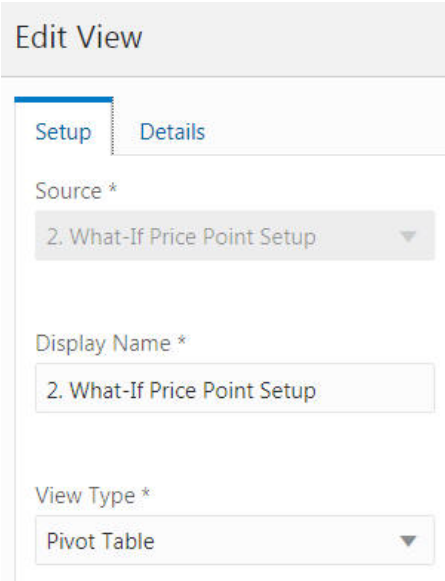
The View Title Bar contains the name of the view being displayed and the buttons for Edit, Expand, and Close.

Figure 8-26 View Title Bar

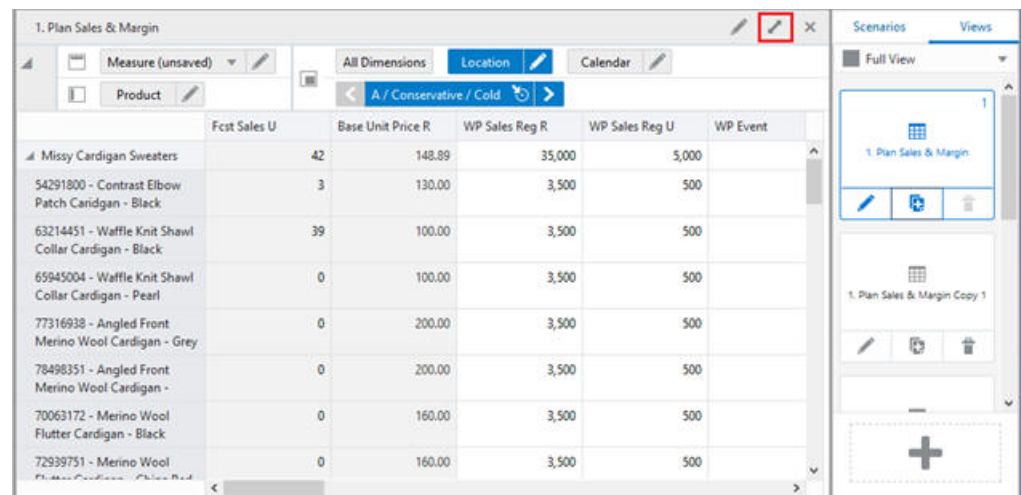


The Edit button opens the Edit View dialog box where you can change the view name, change the view type, rearrange the axes, modify the dimension levels, choose the measure profile, add or remove measures, hide and unhide positions, and so on. For more information on how to perform above steps, see [Chapter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

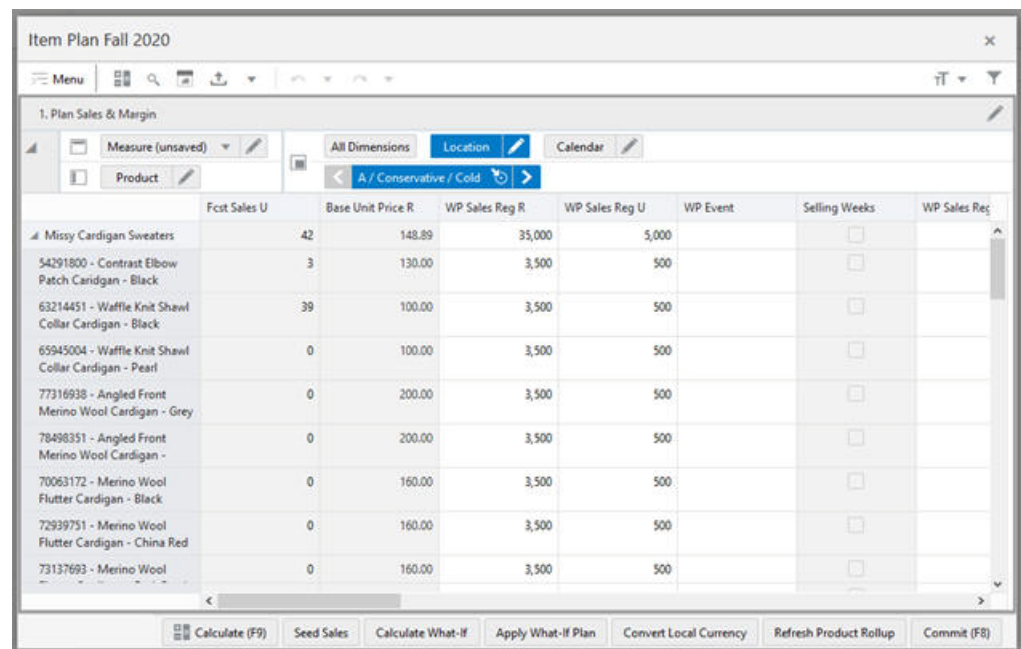
Figure 8-27 Edit View Dialog Box



The Expand button maximizes and detaches the view.

Figure 8–28 Expand View Button

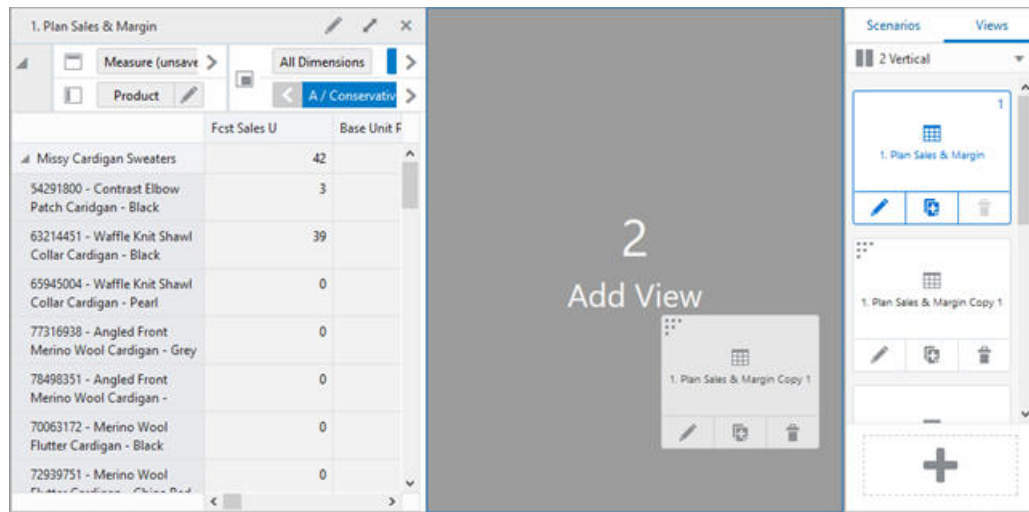
The detached view has Edit and Close Buttons.

Figure 8–29 Detached View with Edit and Close Buttons

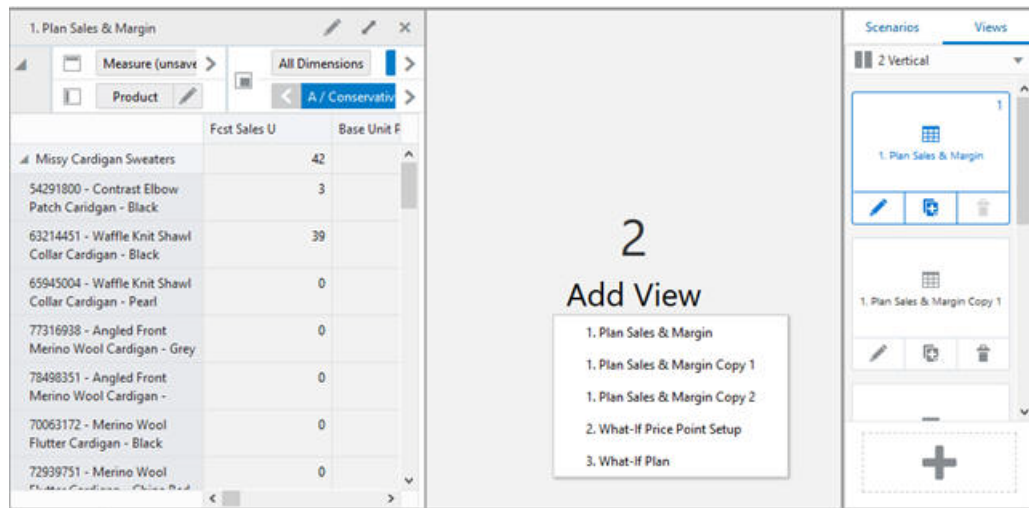
Adding a View to a Layout

To add a view to a layout, click the view to replace the current active full view or 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.

You can click the view you want to see to add it to a blank layout section. It will fill the sections sequentially. To see a different view later, drag and drop the view in the required section.

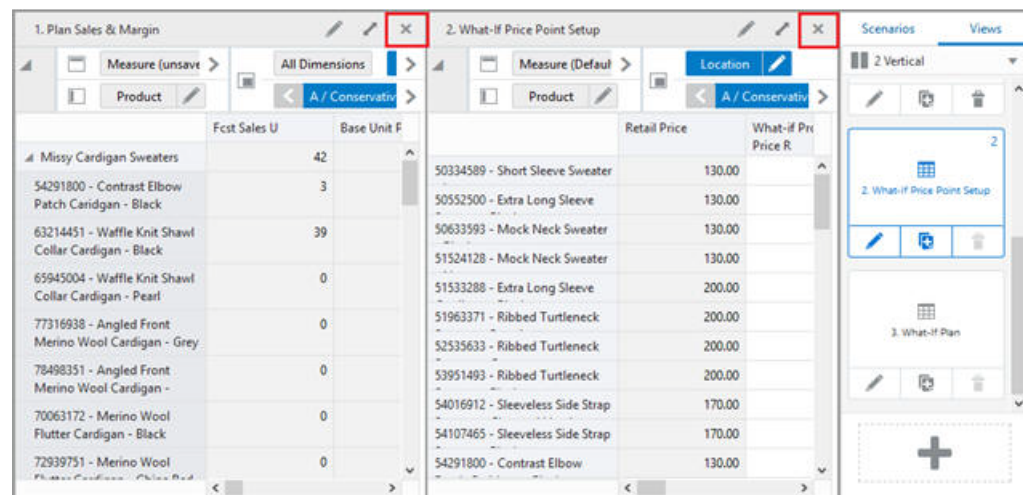
Figure 8–30 Adding a View to a Layout (Drag and Drop)

You can also add a view in a layout section by clicking the **Add View** button and selecting the required view from the list.

Figure 8–31 Add a View

Removing a View from a Layout

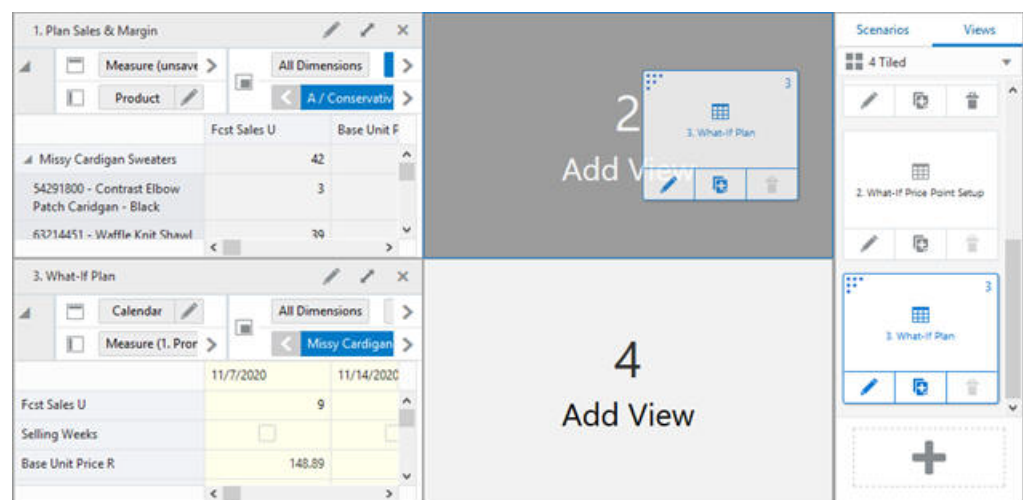
To remove a view from a layout, click the **X** in the upper right corner of the view.

Figure 8–32 Remove View from Layout

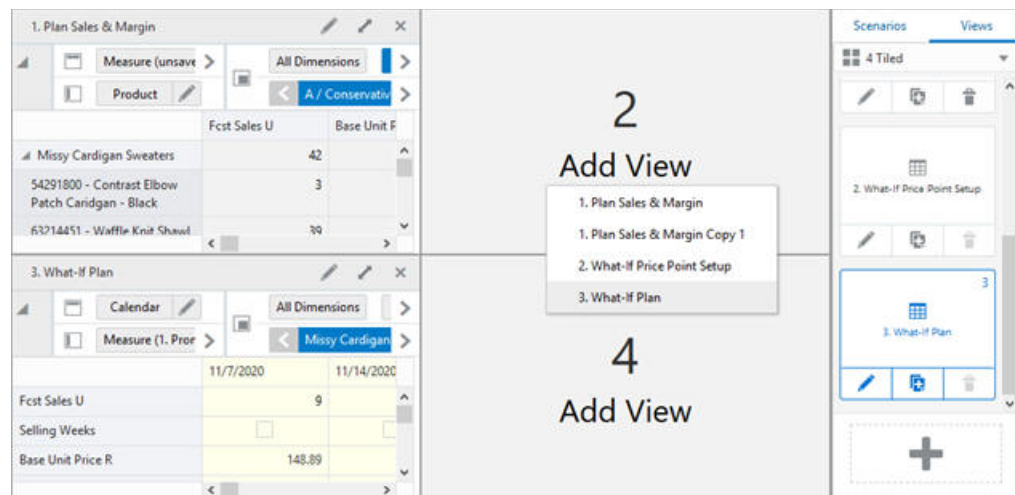
Moving a View

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 8–33](#), to move the view What-If Price Point Setup from layout location 3 to layout location 2, drag the view What-If Price Point Setup from the View Management Drawer to layout location 2.

Figure 8–33 Moving a View (Drag and Drop)

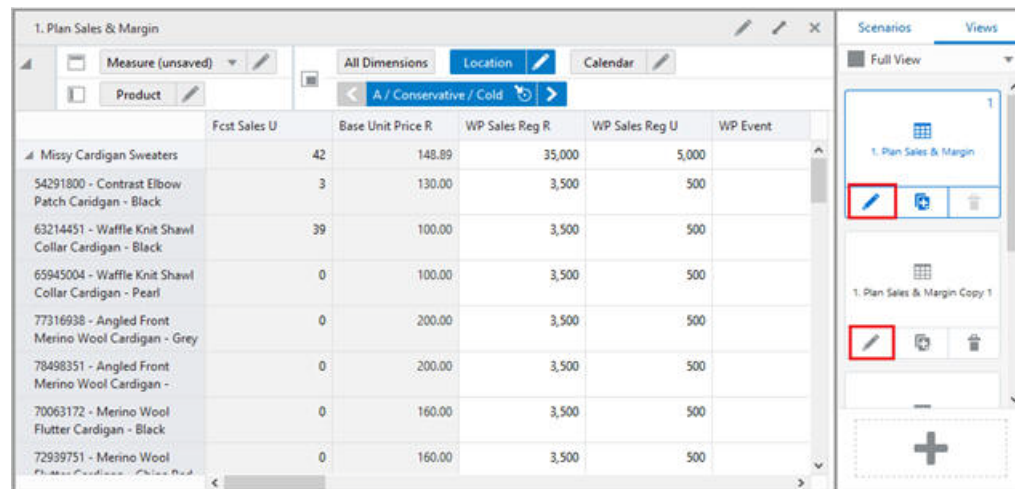
You can also click the **Add View** button in layout location 2 and select What-If Price Point Setup from the list in order to move the view from location 3 to location 2.

Figure 8–34 Moving a View (Add View Button)

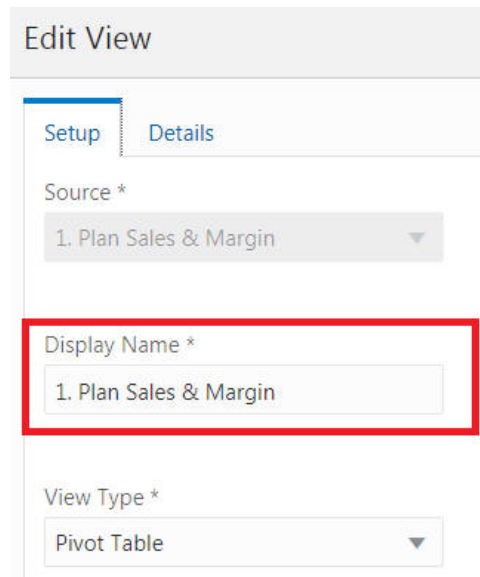
Renaming a View

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

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

Figure 8–35 Renaming a View

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

Figure 8–36 *Change the Display Name*


The screenshot shows the 'Edit View' dialog box with the 'Setup' tab selected. The 'Source' dropdown is set to '1. Plan Sales & Margin'. The 'Display Name' field, which also contains '1. Plan Sales & Margin', is highlighted with a red rectangular border. The 'View Type' dropdown is set to 'Pivot Table'.

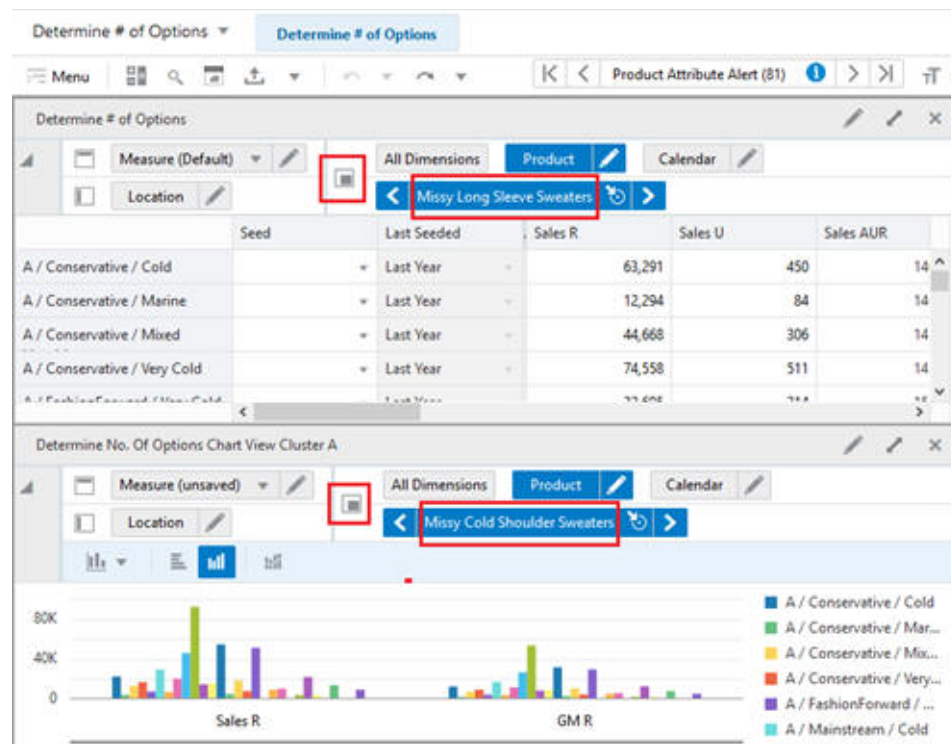
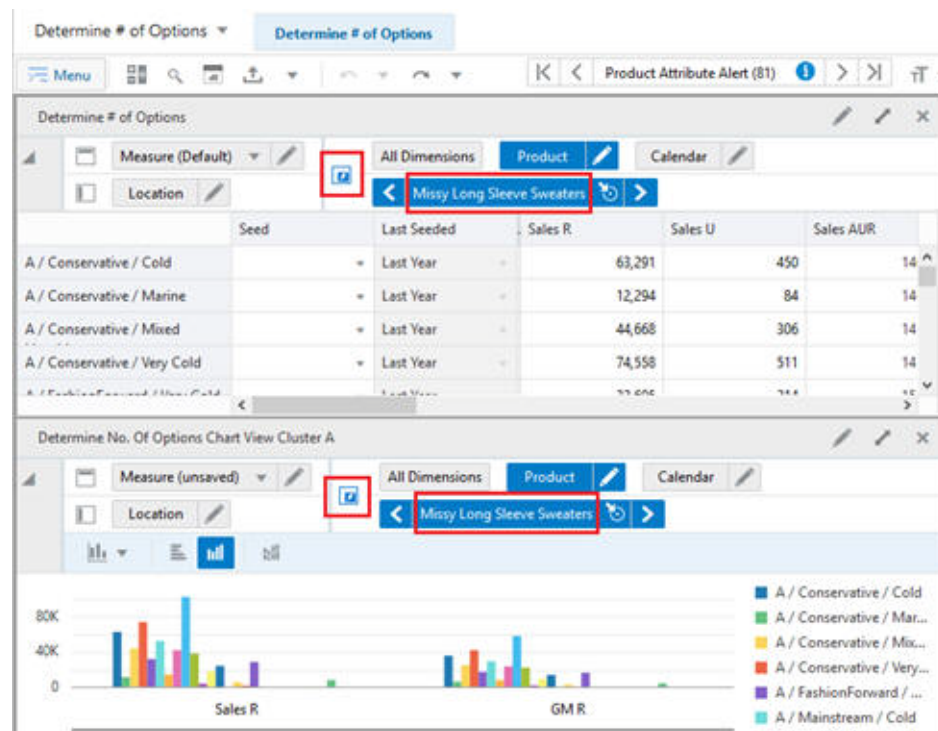
Synchronize Z-Axis Scrolling

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.

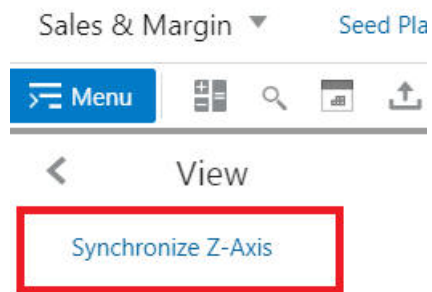
Synchronized Z Axis scrolling works for all views within a single workspace, and it remains enabled as you move through the views, tasks, and steps within that workspace. When Synchronize Z-Axis is enabled, and if the same dimensions (one or all) exist on the page edge of another view, you will see the values for the current position on the synchronized dimension that is on page edge of this view. This means that the page edge of the current view is in sync with the page edge of the view on which you enabled page edge synchronization. The Page Edge and Dimension Tiles area will not be visible.

Synchronized Z Axis scrolling is useful when you want to compare multiple views containing the same page or slice dimension.

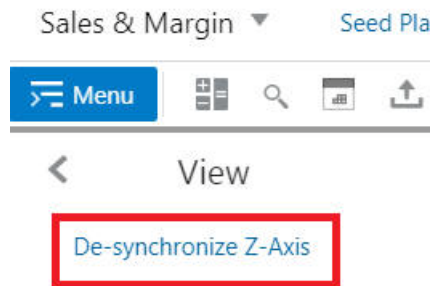
To enable synchronized Z Axis scrolling, click **Synchronize Z Axis** in the Z Axis and Dimension Tiles area, as shown in [Figure 8–37](#) and [Figure 8–38](#).

Figure 8–37 View Before Page Edge Synchronization**Figure 8–38 Enabling Z-Axis Synchronization**

You can also Enable Synchronize Z-Axis by clicking on Menu -> View -> Synchronize Z-Axis, as shown in [Figure 8–39](#).

Figure 8–39 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 8–40](#).

Figure 8–40 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

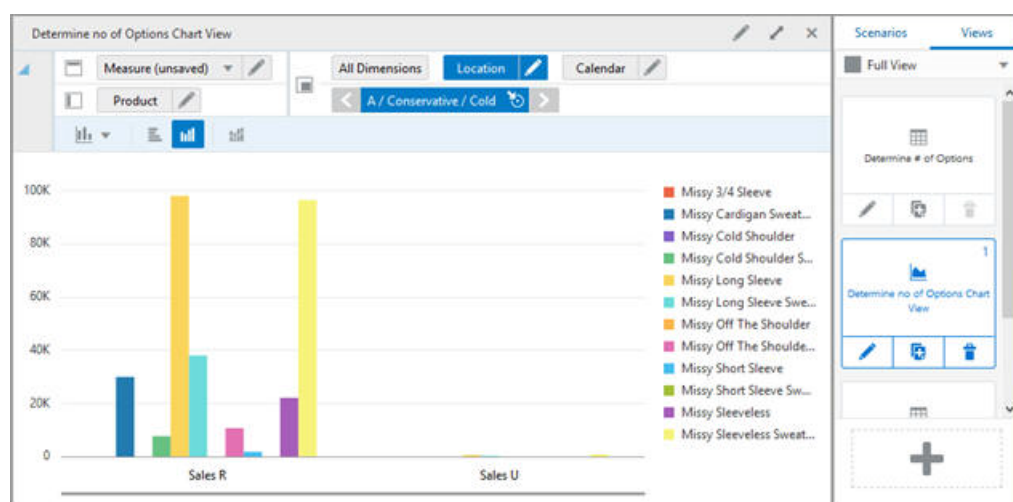
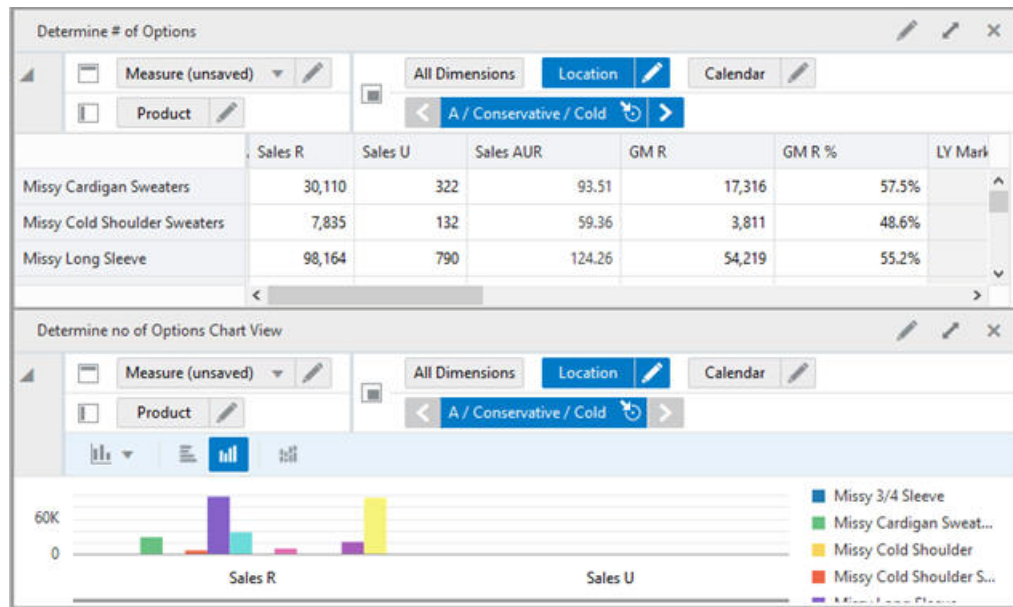
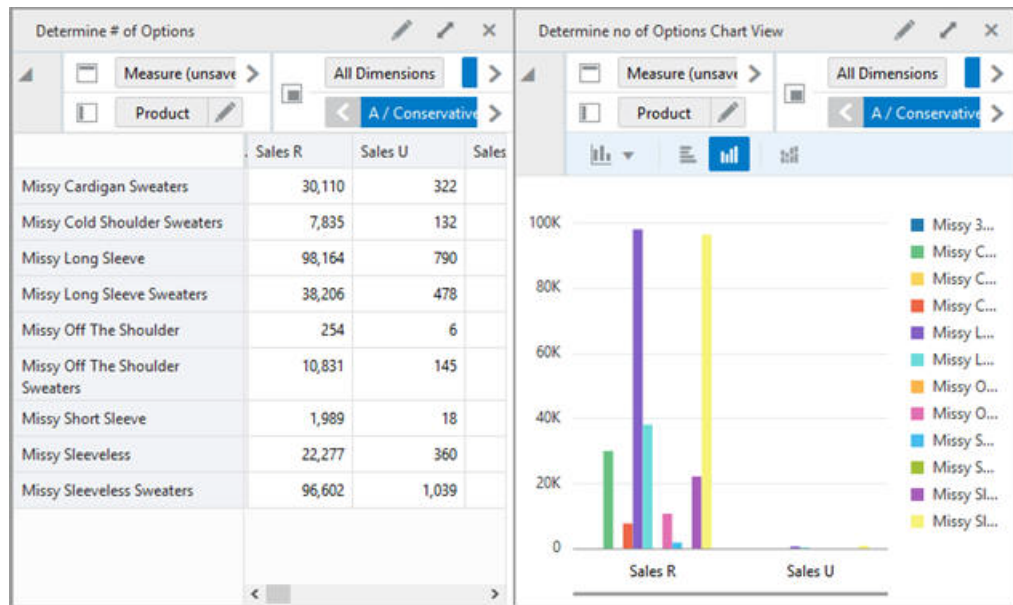


Figure 9–2 Chart in 2-Horizontal View Mode**Figure 9–3 Chart in 2-Vertical View Mode**

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 9–4 Creating a Chart

	Sales R	Sales U	Sales AUR	GM R	GM R %	LY Markdo
Missy Cardigan Sweaters	30,110	322	93.51	17,316	57.5%	
Missy Cold Shoulder Sweaters	7,835	132	59.36	3,811	48.6%	
Missy Long Sleeve	98,164	790	124.26	54,219	55.2%	
Missy Long Sleeve Sweaters	38,206	478	79.93	21,129	55.3%	
Missy Off The Shoulder	254	6	42.25	102	40.3%	
Missy Off The Shoulder Sweaters	10,831	145	74.69	5,567	51.4%	
Missy Short Sleeve	1,989	18	110.50	701	35.3%	
Missy Sleeveless	22,277	360	61.88	12,489	56.1%	
Missy Sleeveless Sweaters	96,602	1,039	92.98	56,216	58.2%	

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 9–5 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 9–6 New View Name

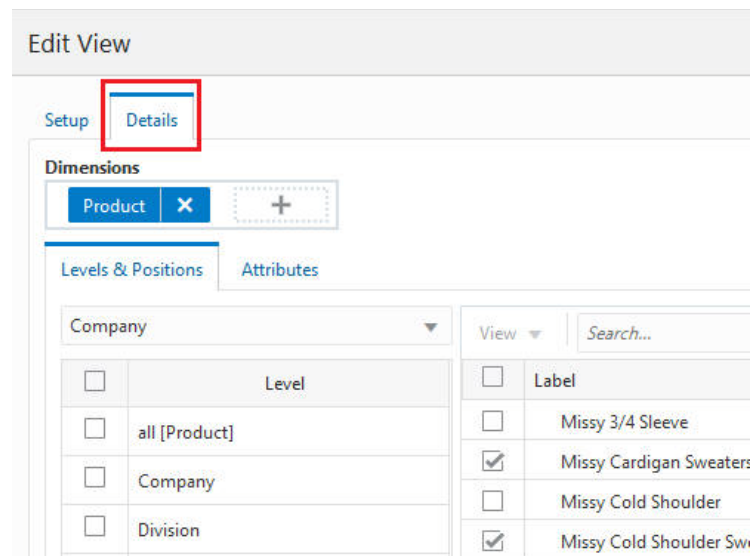
The screenshot shows the 'Edit View' dialog box with the 'Setup' tab selected. The 'Source' dropdown is set to 'Determine # of Options'. The 'Display Name' text box is highlighted with a red rectangle and contains the text 'Determine no of Options Chart View'. The 'View Type' dropdown is set to 'Pivot Table'.

4. Select the type of chart from the list.

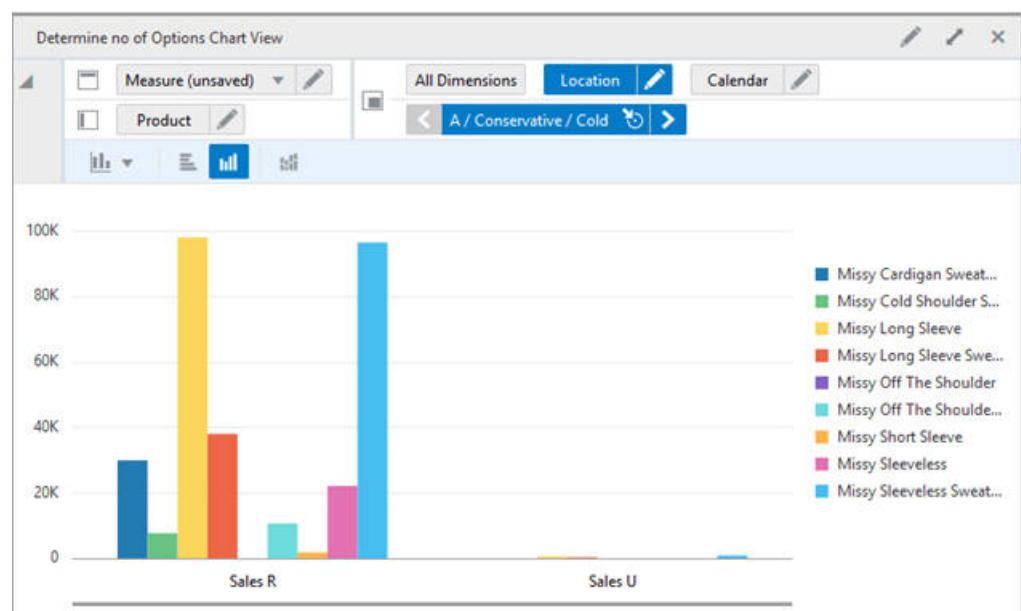
Figure 9–7 Chart Type

The screenshot shows the 'Edit View' dialog box with the 'Setup' tab selected. The 'Source' dropdown is set to 'Determine # of Options'. The 'Display Name' text box contains the text 'Determine no of Options Chart View'. The 'View Type' dropdown is open, showing a list of chart types: Pivot Table, Bar Chart, Area Chart, Line Chart, Pie Chart, Combination Chart, Line with Area Chart, and Funnel Chart.

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

Figure 9–8 Chart Details

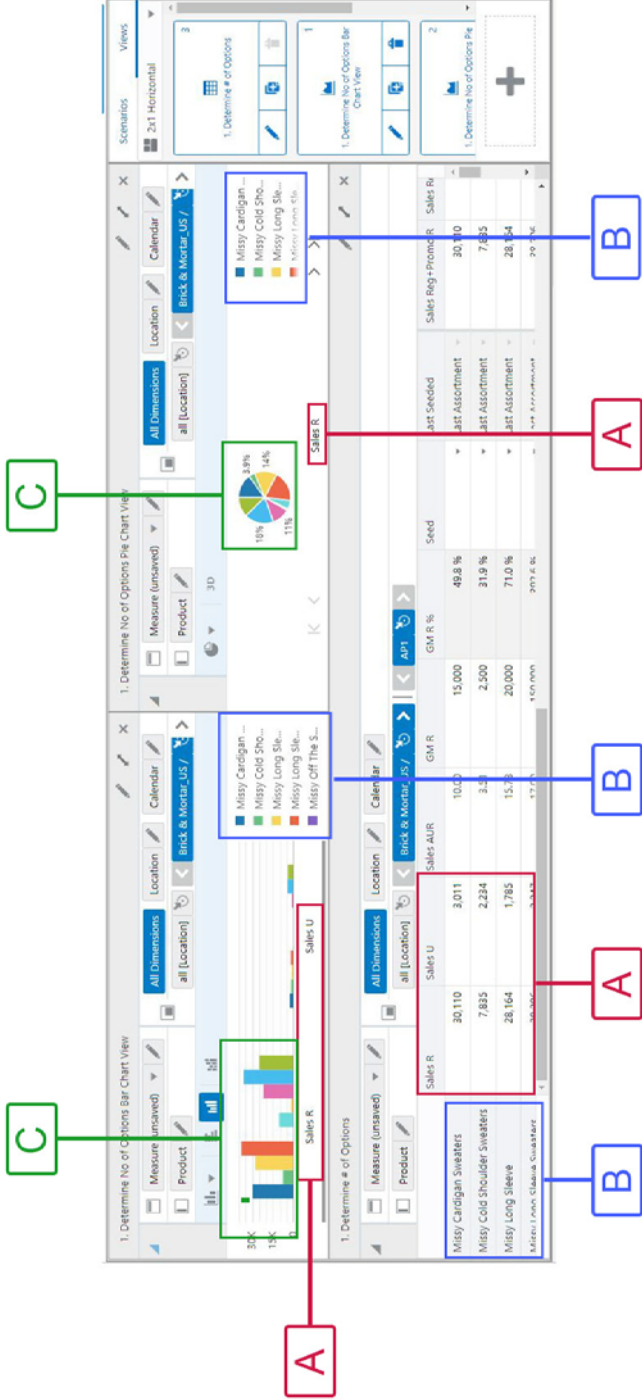
6. Drag the new Chart view tile into the content area to view the chart.

Figure 9–9 Chart View

Data in Charts

In chart view, the positions on row are represented as series. The data values in a column are plotted together as a group.

Figure 9–10 Data Mapping in Charts



Key for Figure 9–10:

A: X-axis Data Mapped as a Group (red)

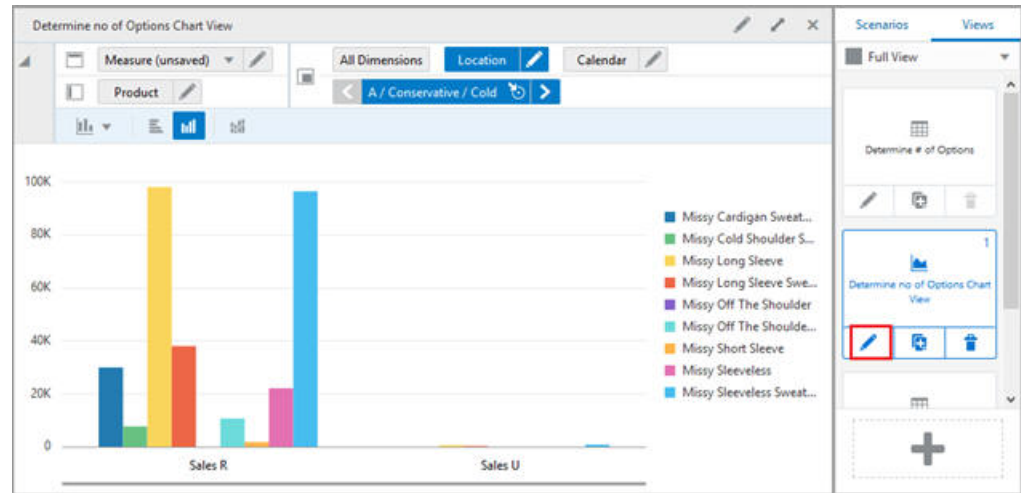
B: Y-axis Data Mapped as a Series (blue)

C: Data for all the Series belonging to a Group (green)

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*

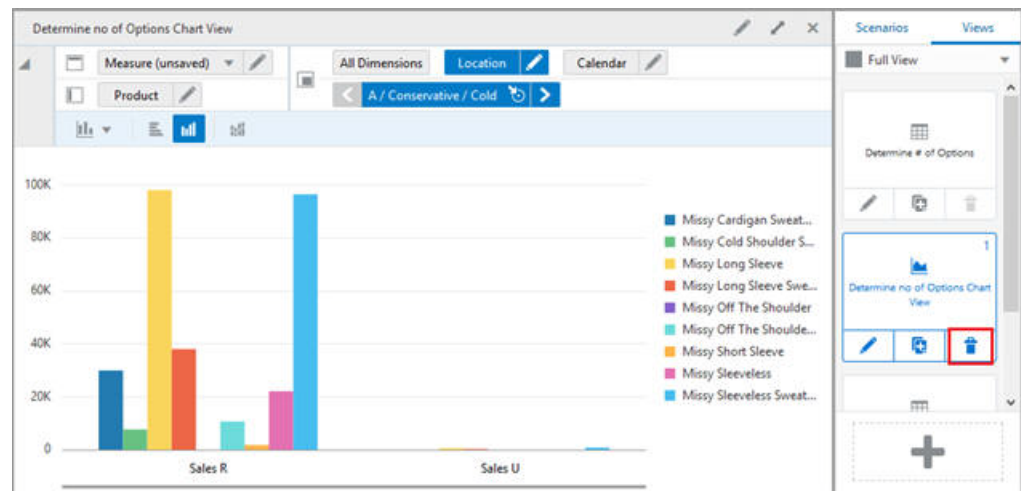


Deleting a Chart

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*



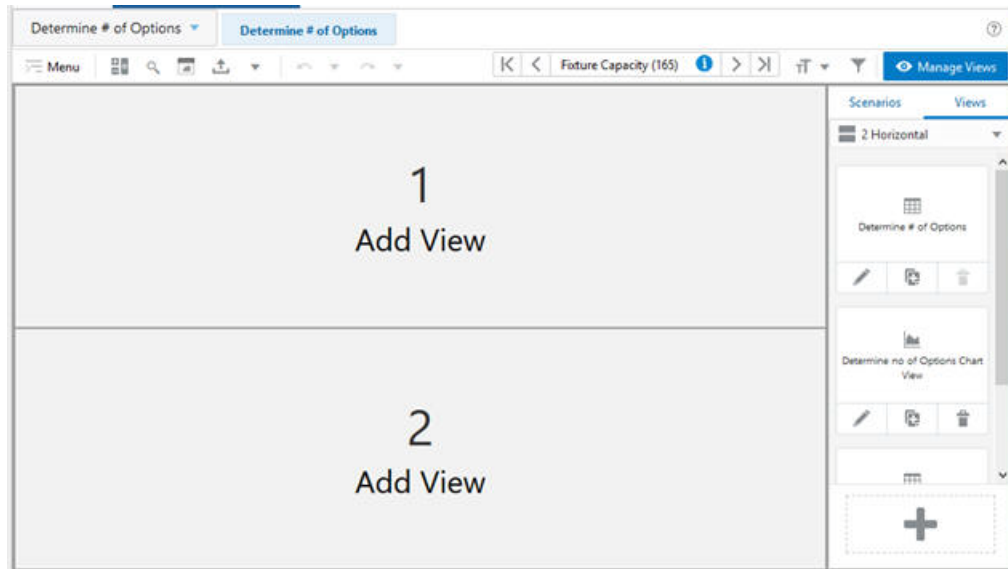
Synchronize Z Axis with Charts

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.

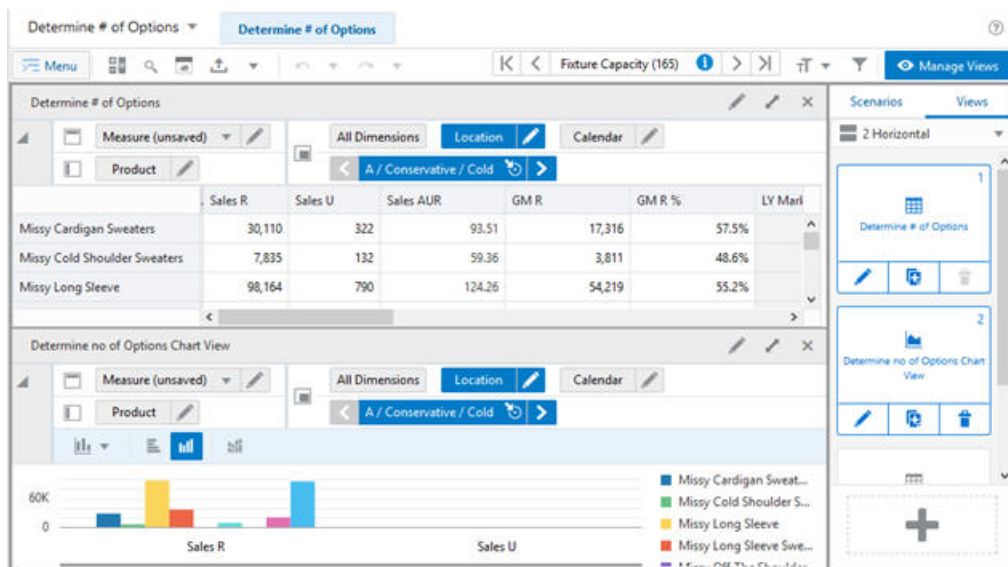
1. In the View Layout list, select any option except for Full View. In this example, 2 Horizontal has been selected.

Figure 9–13 Select View Layout

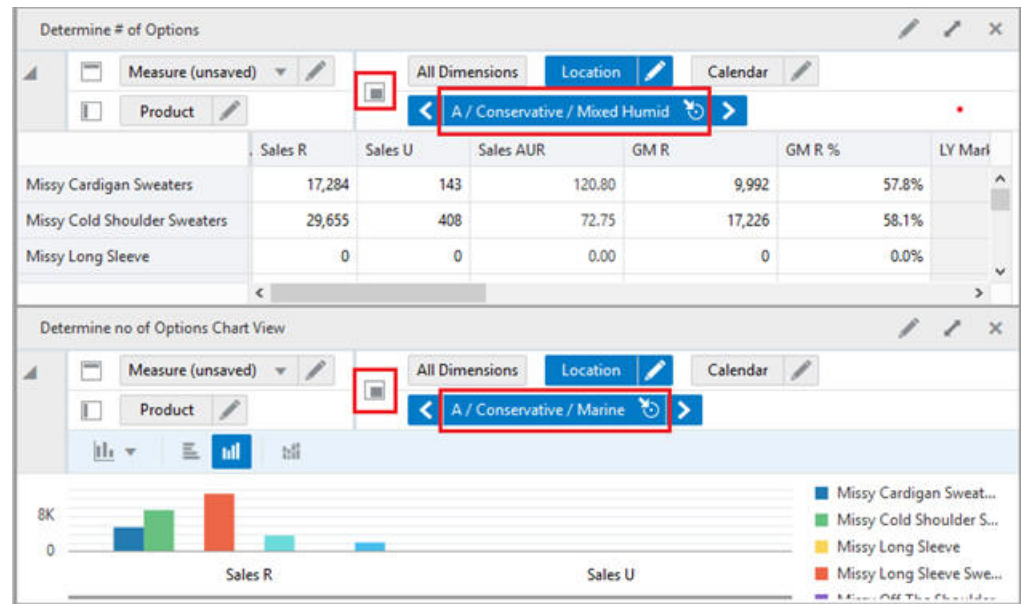


2. Add at least two views to a layout by dragging the View Tiles from the View Management Drawer. In this example, the Determine no of Options tile and the Determine no of Options Chart View Cluster A tile have been dragged into the layout.

Figure 9–14 Add Chart View to Layout



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

Figure 9–15 Activate Synchronize Z Axis

4. The activated Synchronize Z Axis button displays in blue on both tiles. Both views have scrolled to the same Product position.

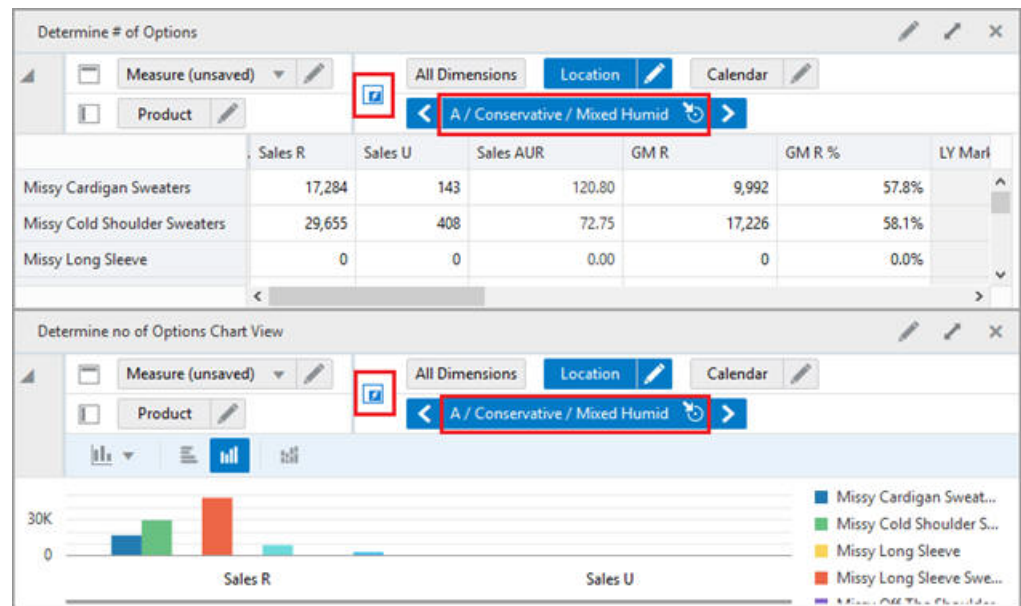
Figure 9–16 Synchronize Z Axis

Chart Types

The following chart types are available:

Multi Group Charts

- Bar Chart
- Area Chart

- Line Chart
- Combination Chart
- Line with Area Chart
- Polar Chart
- Stacked Area Chart

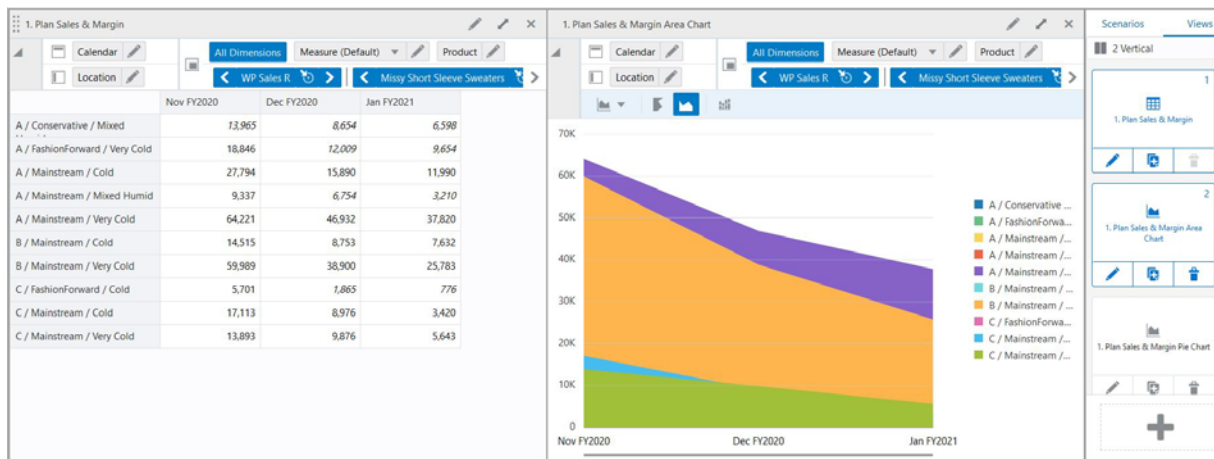
Single Group Charts

- Pie Chart
- Funnel Chart
- Pyramid Chart

Multi Group Charts

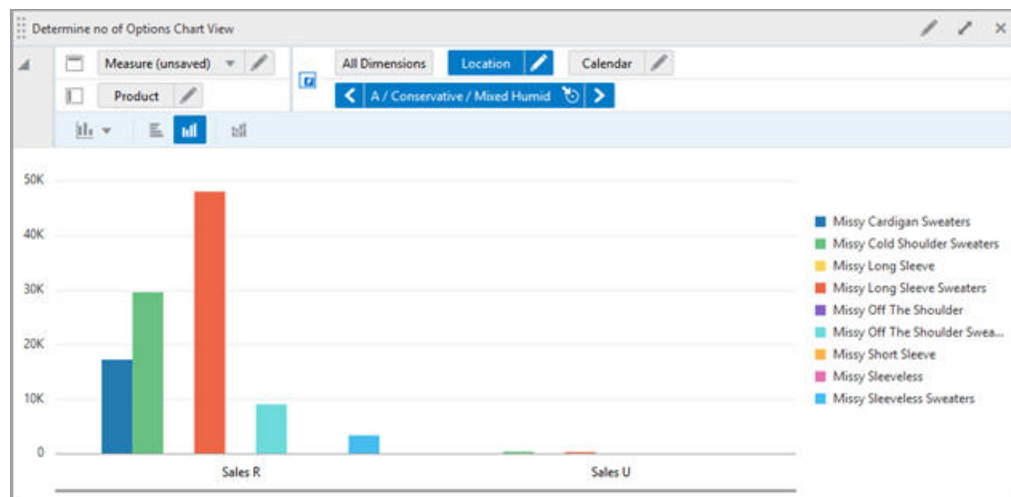
A multi-group chart shows data for multiple columns or groups. For example, the chart in [Figure 9-17](#) plots WP Sales R values for Missy Short Sleeve Sweaters across 10 different locations over time (three months).

Figure 9-17 Multi-group Chart



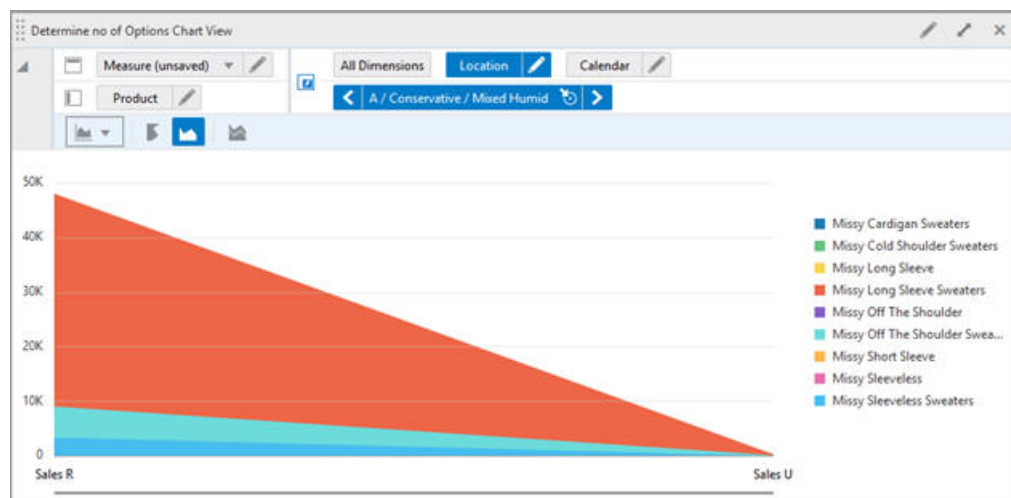
Bar Chart

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

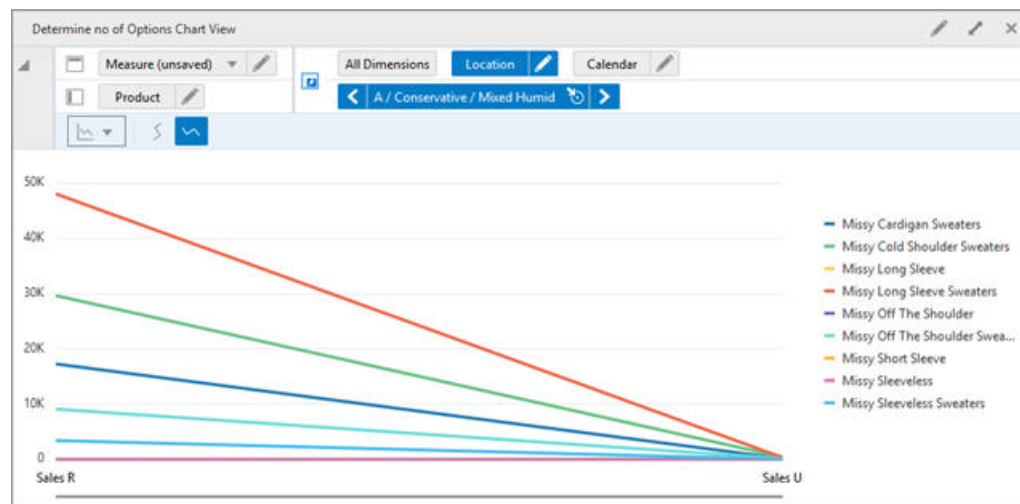
Area Chart

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

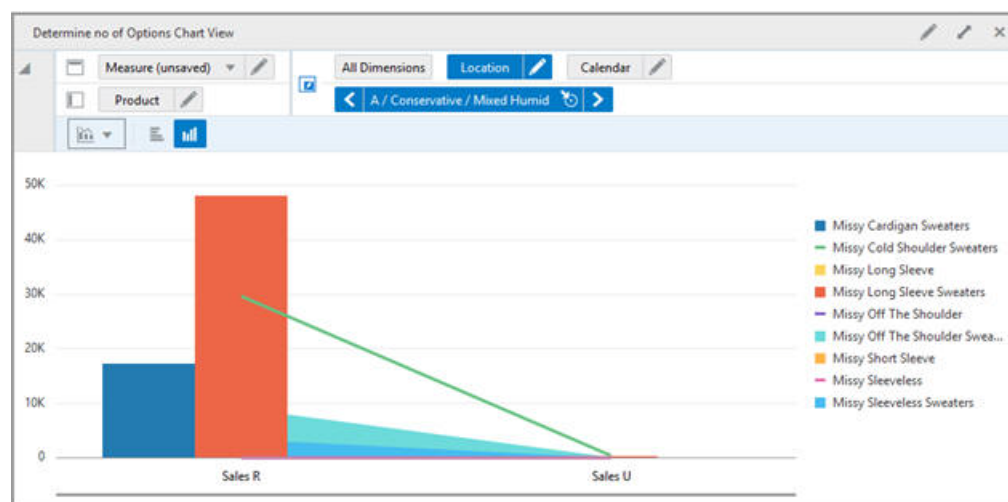
Line Chart

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

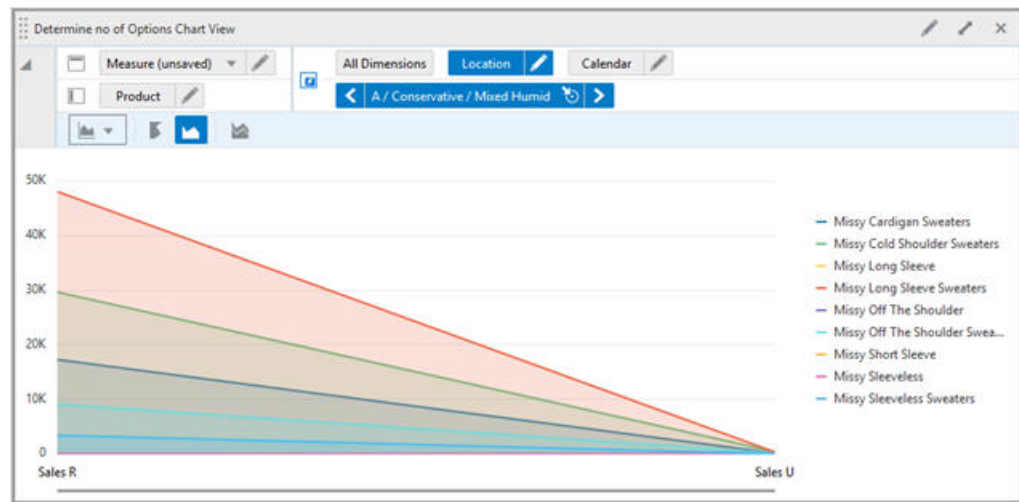
Combination Chart

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.

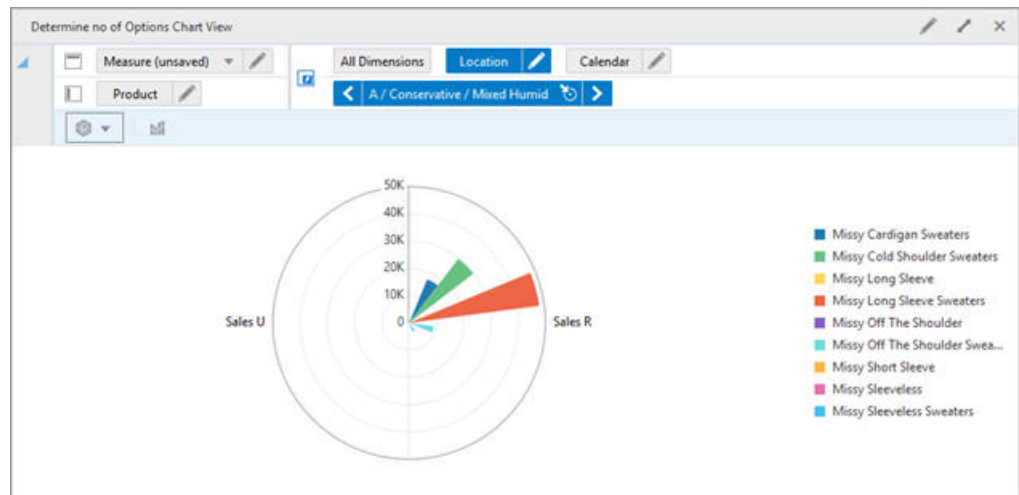
Figure 9–21 Combination Chart

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.

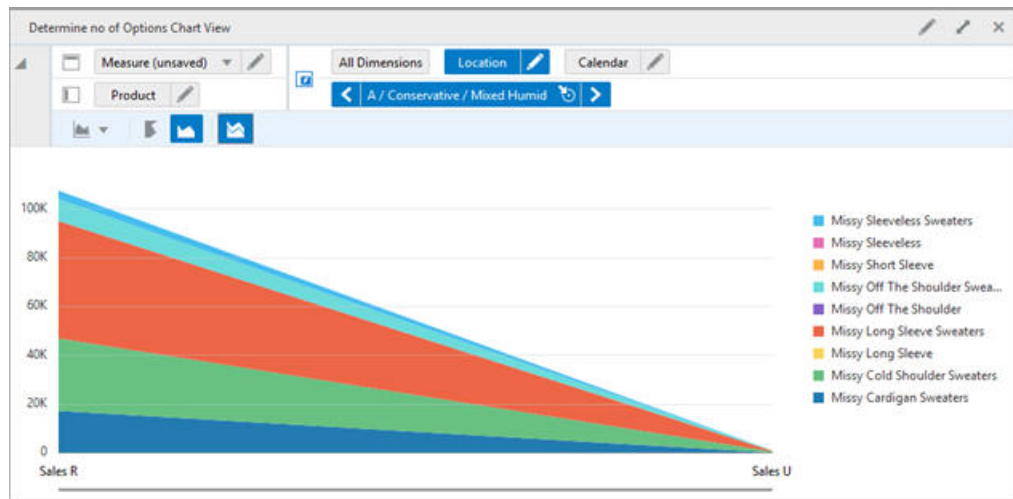
Figure 9–22 Line with Area Chart**Polar Chart**

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



Boolean Data Representation in Charts

Boolean data can also be represented in chart along with other measures. Boolean measure data is represented in chart if the value of Boolean is **True**. Visual representation of Boolean in a chart helps the user to understand the data better and enables the ability to review the data visually.

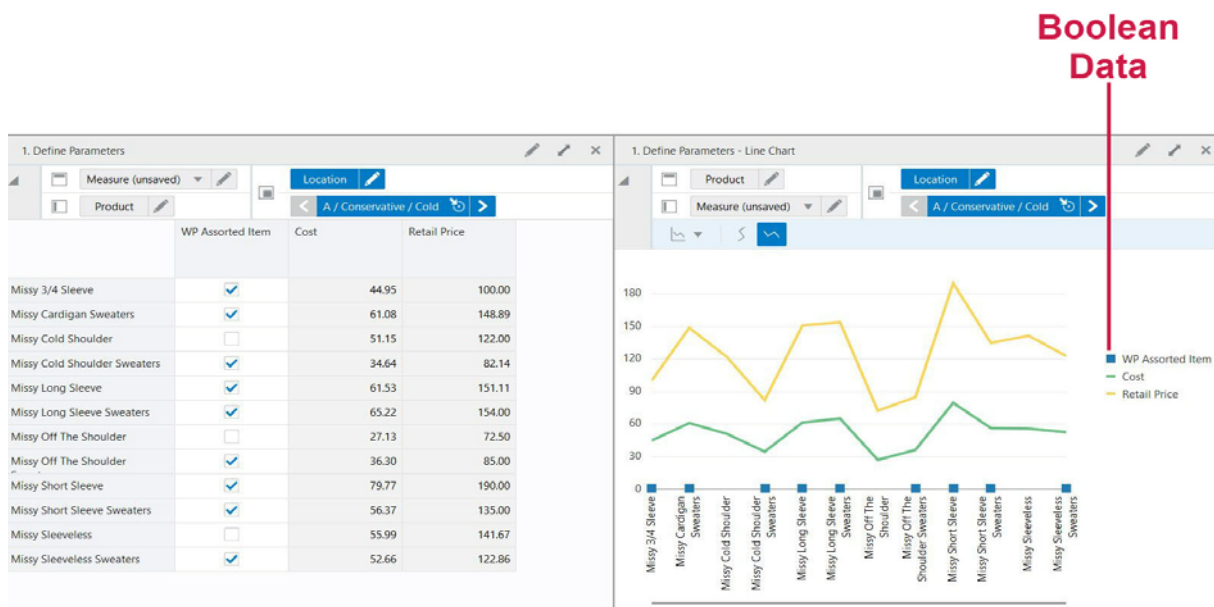
Examples of Boolean data include calendar events such as promotion weeks, selling weeks, stock-outs, and so on.

The Boolean data is presented by colored symbol in the charts. Multiple Boolean measures in single chart is represented by different color symbols. If the two Boolean symbols overlaps each other, one of these symbols can be hidden by clicking the corresponding series label in the chart's legends.

The following chart represents the Assorted Item - Boolean Measure (blue symbol). For example, the [Figure 9–25, "Boolean Data in Chart"](#) shows WP Assorted Item - Boolean Measure against cost and retail price of products. In the chart the Blue symbol represents the assorted items that is, WP Assorted item Boolean Value = True.

Based on the visual representation, users can easily analyze cost versus retail price for each item to make decision for adding or removing product from assorted item.

Figure 9–25 Boolean Data in Chart



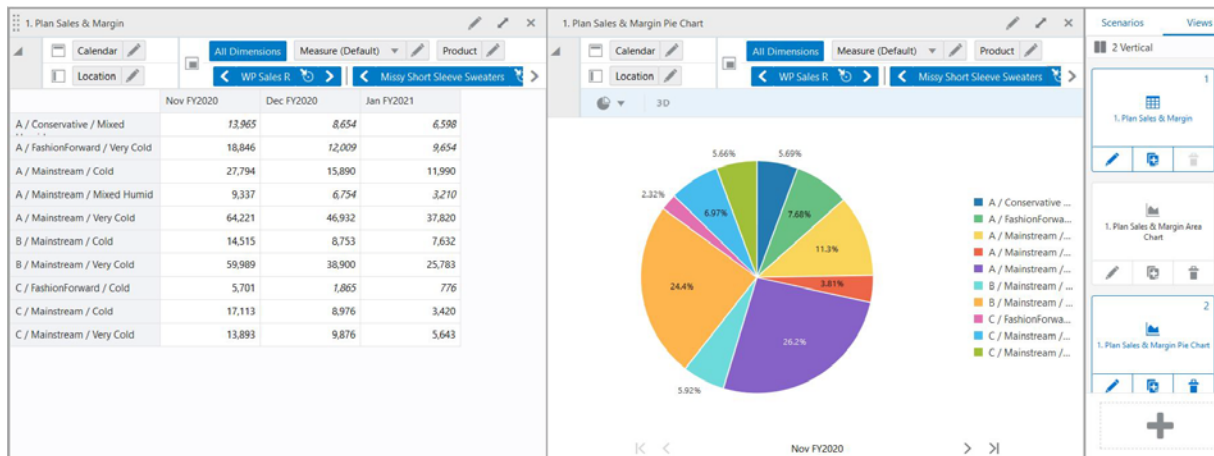
The Boolean data can be represented in following charts:

- [Area Chart](#)
- [Line Chart](#)
- [Combination Chart](#)
- [Line with Area Chart](#)

Single Group Charts

A single-group chart shows data for only one column or group. For example, the chart in [Figure 9-26](#) compares WP Sales R values for Missy Short Sleeve Sweaters across 10 different locations for one month.

Figure 9-26 Single Group Chart

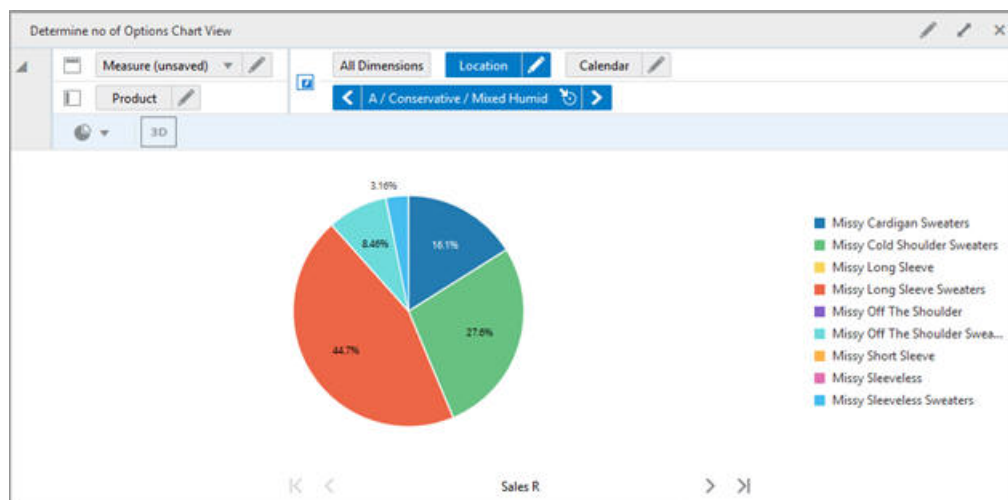


Pie Chart

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

In [Figure 9-27](#), because this is a single-group chart, only one quarter is shown at a time.

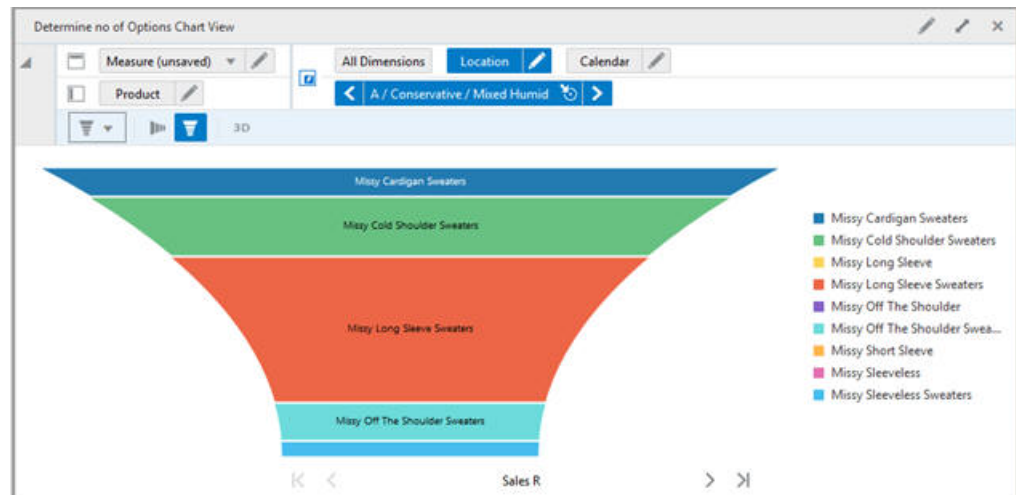
Figure 9-27 Pie Chart



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.

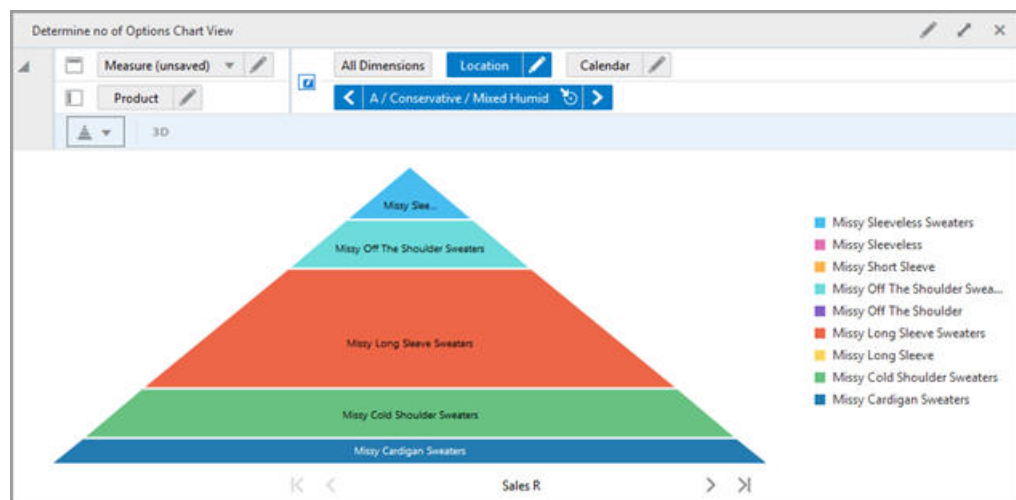
Figure 9–28 Funnel Chart



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 9–29 Pyramid Chart

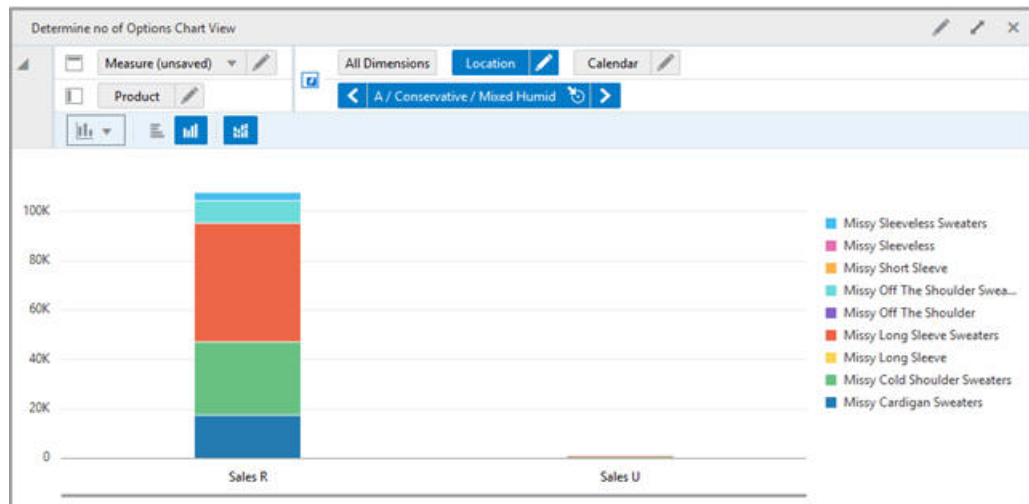


Formatting Charts

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:

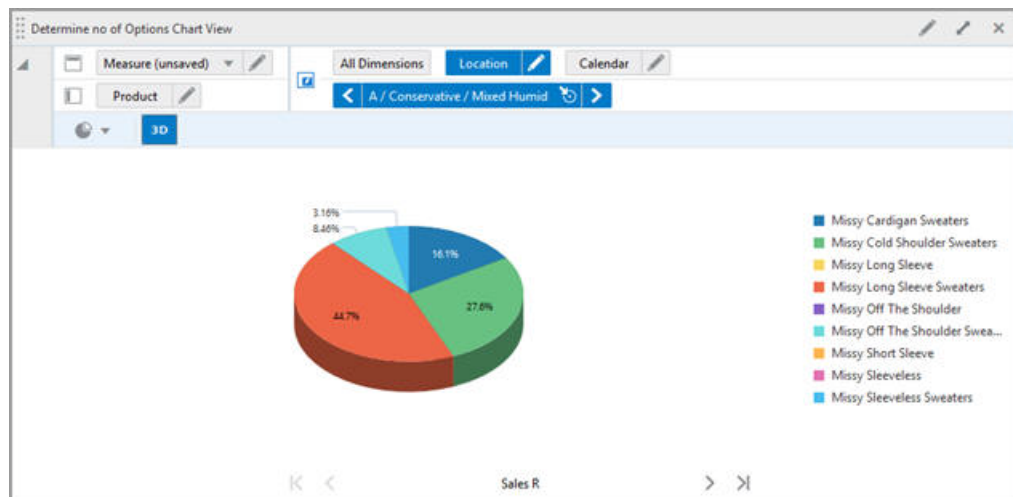
- Stacked charts help in displaying the cumulative magnitude of two or more data series. They are useful in representing a data value as a sum of two or more values. Each data series can be distinguished by the color of its section in the stack.

Figure 9–30 Stacked Chart



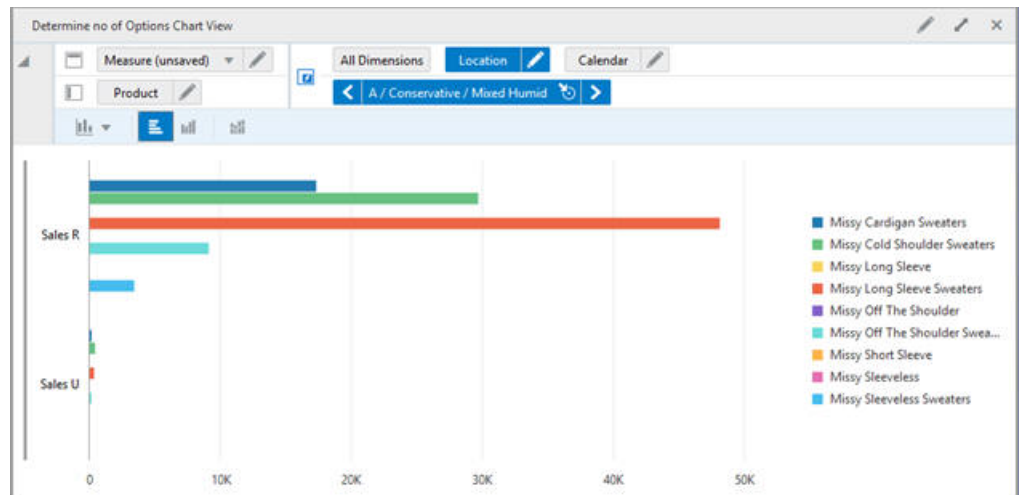
- 3-D charts rotate the chart into a 3-D display.

Figure 9–31 3-D Chart



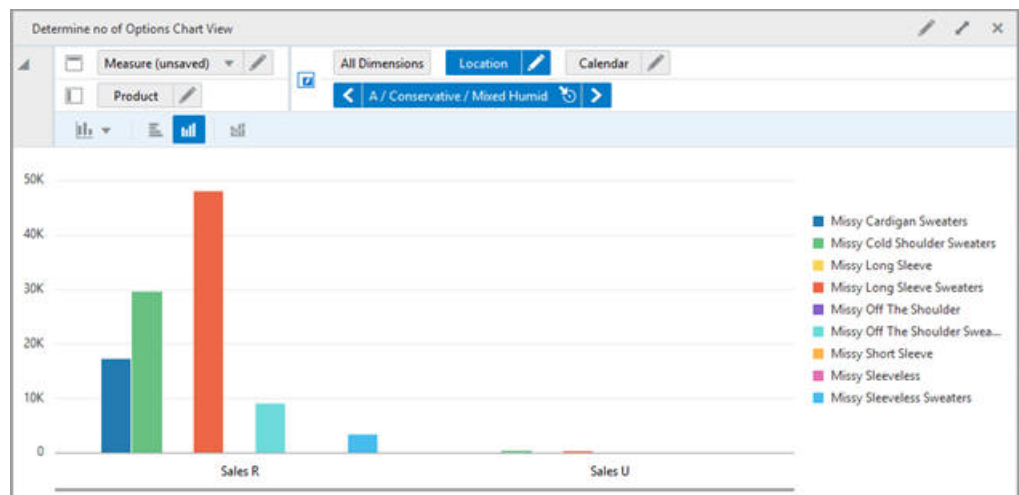
- The horizontal button rotates the chart from vertical to horizontal.

Figure 9–32 Horizontal Chart



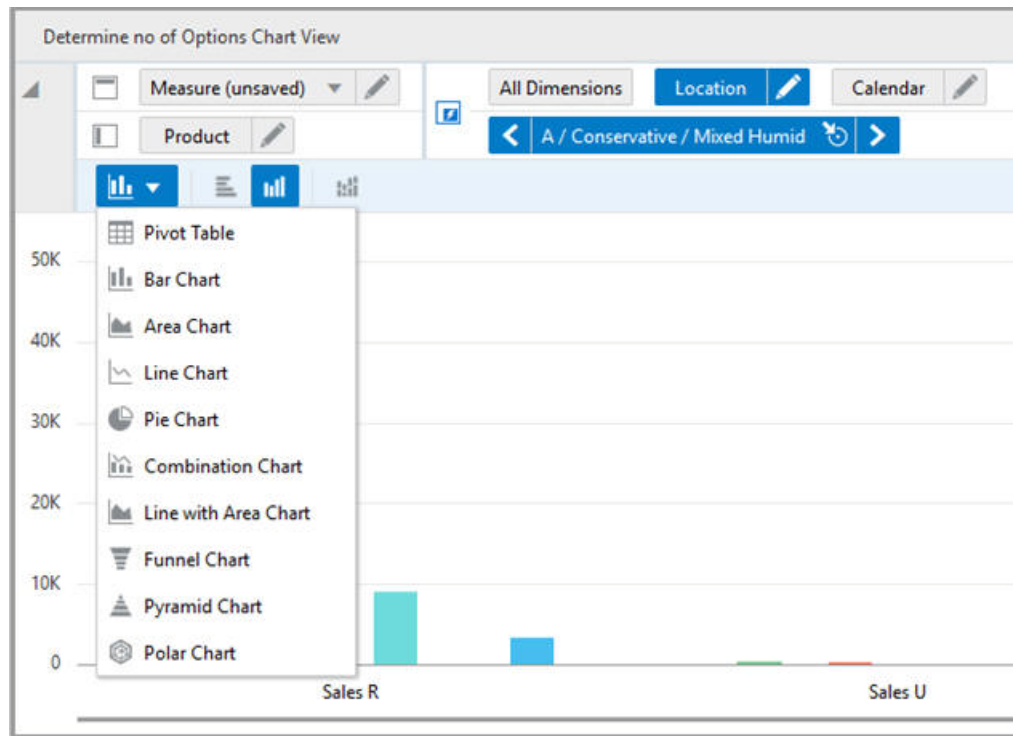
- The vertical button rotates the chart from vertical to horizontal.

Figure 9–33 Vertical Chart



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

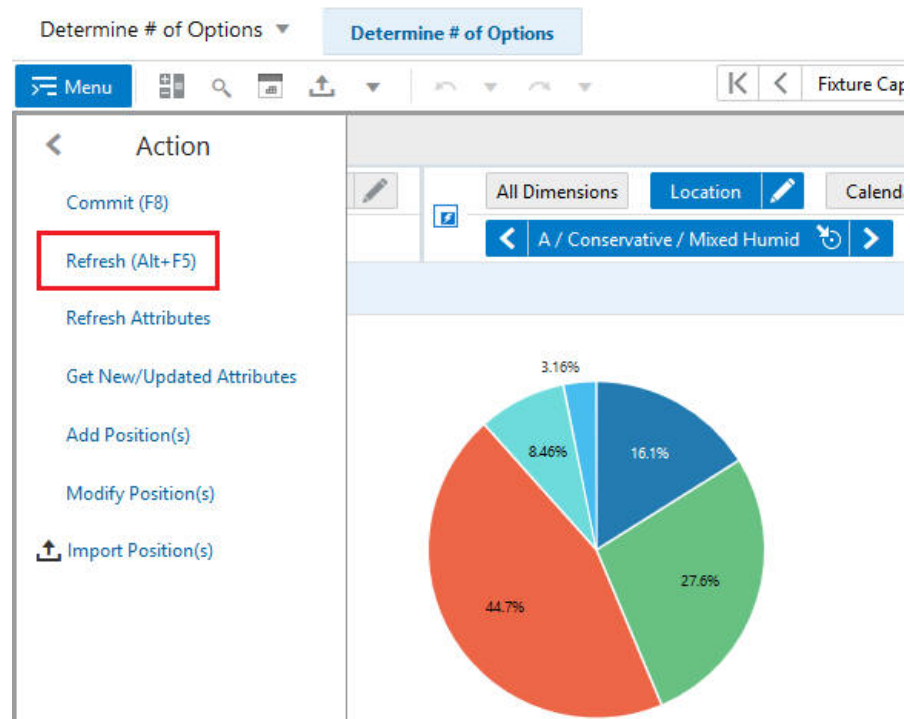
Figure 9–34 Change Chart Type



Refreshing the Chart

To update the chart with the latest data from the database, click Menu->Action ->Refresh (Alt + F5). This refreshes the charts and pivot tables.

Figure 9–35 Refresh Chart



10

Formatting

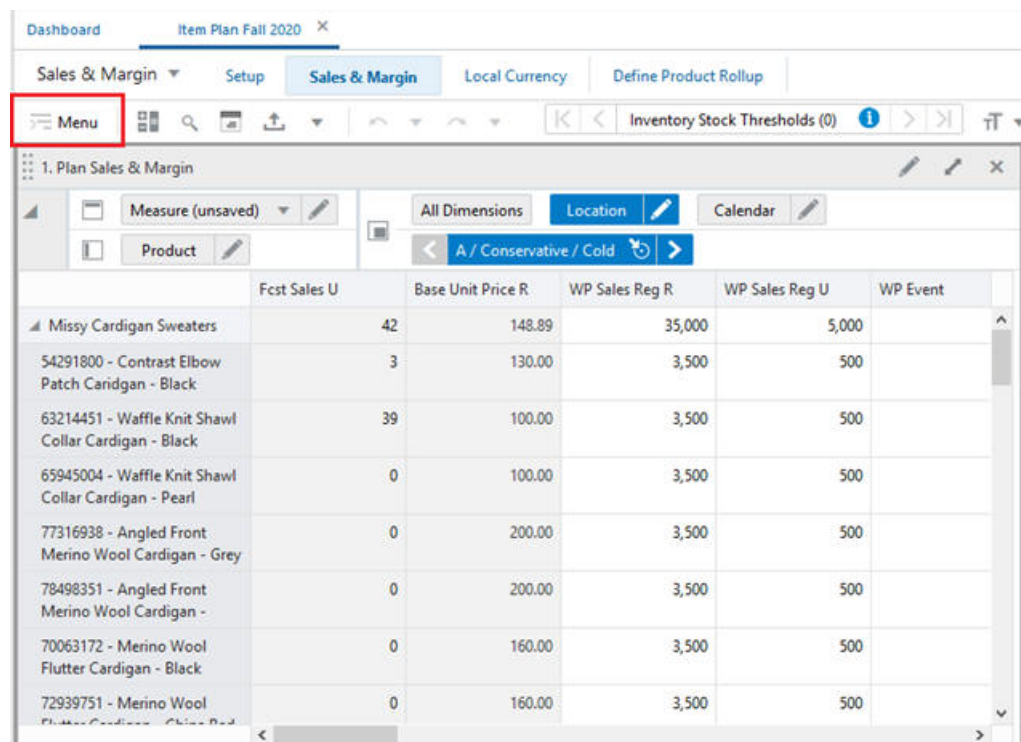
Using the Format functionality, you can set and clear formats that apply to measures, dimensions, and exceptions. You can make changes to single or multiple measures, dimensions, and exceptions and apply these changes across one, many, or all views in the workspace.

Using the Filter in the Format Dialog Box

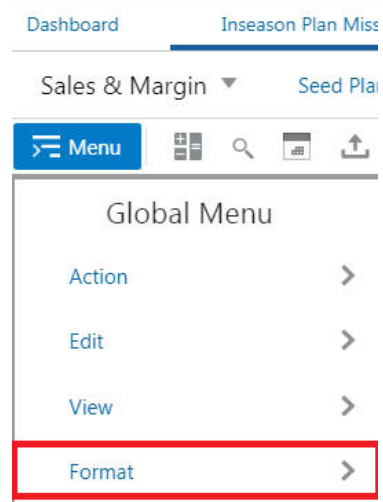
To find measures using the filter, complete the following steps:

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

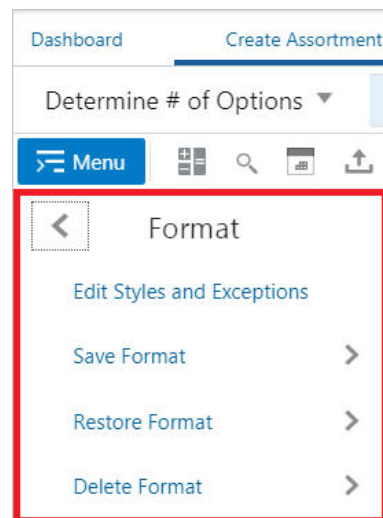
Figure 10–1 Quick Access Toolbar Menu



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

Figure 10–2 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.

- **Apply to:** Select a dimension you want to apply a format to or select a measure to apply a format to.
- **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 views, tabs, or steps in which you want to search for measures.
- **Apply to Views:** Select the views, tabs, or steps that you want to change the styles for.

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.

Note: During the initial configuration, background and text colors are determined by the configurator. At that time, many possible colors may have been selected.

You can change these colors using the Format dialog box. The colors listed in the dialog box have been chosen by the UI designers for proper contrast and for compatibility with the Oracle Retail look-and-feel standards. However, the listed colors may not match the colors selected during configuration. In such cases, you will see the original preview color in the dialog box, but you will not see that color in the list of available colors.

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 Measure from the Apply to list. 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

Format

Apply to Measure ▾

X

Visible in... Type
Sales & Margin ▾ All ▾

Search for Measures...

.

.

.

.

.

Base Unit Price R

CP Sell Thru %

Fcst Sales U

Markdown Discount %

Markdown Discount Lbl

Markdown Sales Lift %

No selections Select All

Apply to Views
Sales & Margin ▾

Current Selection

Styles Exceptions

Measures:

 No measures selected

Views:

 4. Review Promotions Library, 5. Review Markdowns Library, 1. Plan Sales & Margin, sales&Margin, 3. What-

Basic Formatting

Cell Format

Text Format

B I U

Clear

Header Formatting

Cell Format

Text Format

B I U

Clear

Preview

Read-Only

Apply

Cancel

Save

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 Select Measure

Format

Apply to: **Measure**

Visible in...: **Sales & Margin** Type: **All**

☐ Markdown Sales Lift %
☐ Needed Sales Lift %
☒ Promo Discount %
☒ Promo Sales Lift %
☐ Recommended Markdown %
☐ Recommended Markdown Price
☐ Retail Price
☐ What-if Apply Price Point
☐ What-if Clr Price Disc %
☐ What-if Clr Price R
☐ What-if Clr Sales Lift %

2 selected Show Selected Select All Clear

Apply to Views: **Sales & Margin**

Current Selection **Styles** Exceptions

Measures: Promo Sales Lift %, Promo Discount %
 Views: 4. Review Promotions Library, 5. Review Markdowns Library, 1. Plan Sales & Margin, sales&Margin, 3. Wh...

Basic Formatting

Cell Format: Text Format: **B** *I* U

Number Formatting

Quick Format: Prefix: Suffix: Scale: Decimal Places:

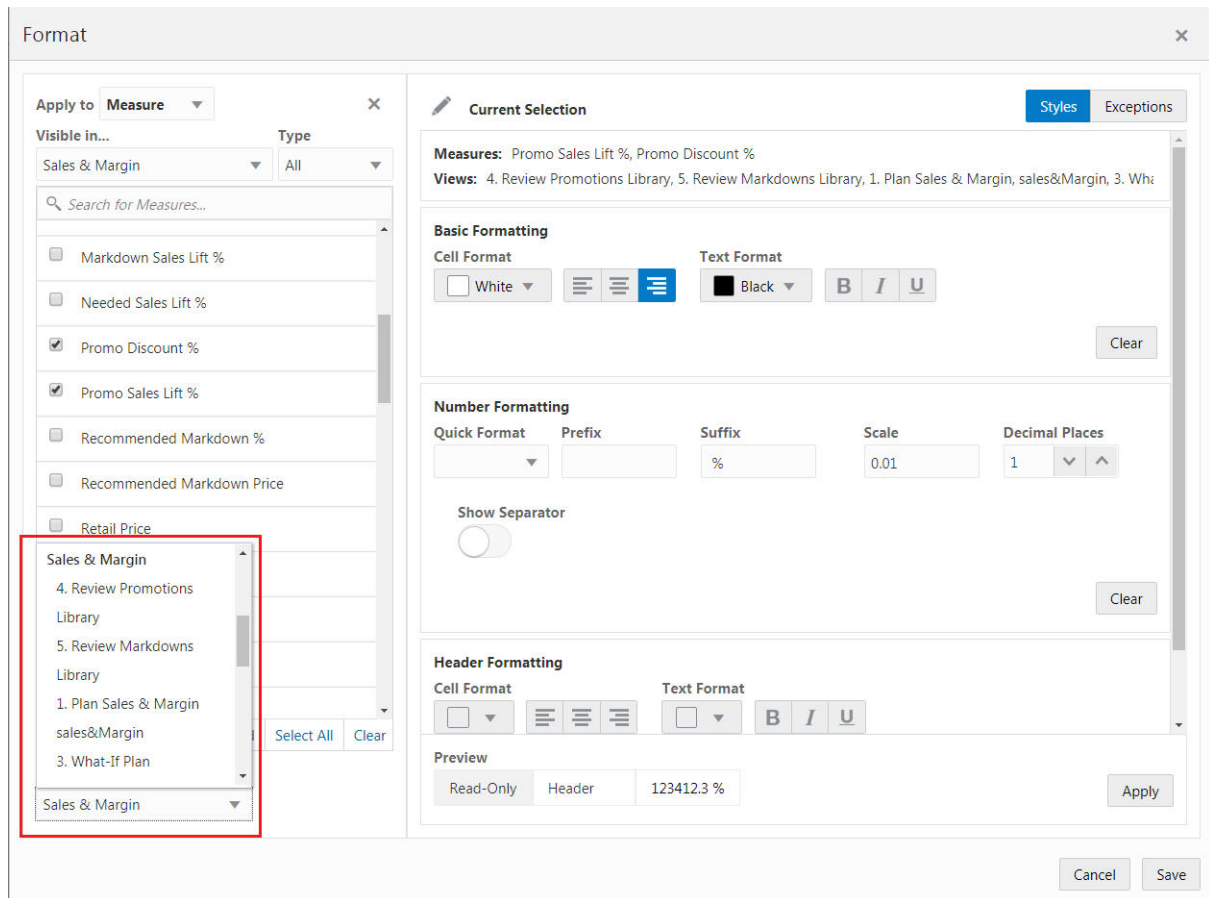
Show Separator: ☐

Header Formatting

Cell Format: Text Format: **B** *I* U

Preview: Read-Only Header 123412.3 %

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*

Format

Current Selection

Styles

Exceptions

Measures:

Promo Sales Lift %, Promo Discount %

Views:

4. Review Promotions Library, 5. Review Markdowns Library, 1. Plan Sales & Margin, 3. What-If Plan, 2. What-If Price Point Setup

Basic Formatting

Cell Format

White

Text Format

Black

B

I

U

Clear

Number Formatting

Quick Format

Prefix

Suffix

Scale

Decimal Places

Show Separator

%

0.01

1

Clear

Header Formatting

Cell Format

Text Format

B

I

U

Clear

Preview

Read-Only

Header

123412.3 %

Apply


Cancel

Save

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




Format ×

 **Current Selection** Styles Exceptions

Measures: Promo Sales Lift %, Promo Discount %

Views: 4. Review Promotions Library, 5. Review Markdowns Library, 1. Plan Sales & Margin, sales&Margin, 3. What-If Plan, 2. What-If Price Point Setup

Basic Formatting

Cell Format: ☐ White ☒    Text Format: ☒ Black ☐ **B** *I* U

Number Formatting

Quick Format: Prefix: Suffix: Scale: Decimal Places: Show Separator: ☐

Header Formatting

Cell Format: ☐ ☒ ☐ Text Format: ☐ ☒ **B** *I* U

Preview

Read-Only Header 123412.3 %

Cancel Save

Figure 10–10 Selection Views

Format

Current Selection Styles Exceptions

Measures: Promo Sales Lift %, Promo Discount %

Views: 4. Review Promotions Library, 5. Review Markdowns Library, 1. Plan Sales & Margin, 3. What-If Plan, 2. What-If Price Point Setup

Basic Formatting

Cell Format White Left Center Right **Text Format** Black **B** **I** **U**

Number Formatting

Quick Format Quick Format **Prefix** Prefix **Suffix** % **Scale** 0.01 **Decimal Places** 1 ^ v **Show Separator** Off

Header Formatting

Cell Format Header **Text Format** Header **B** **I** **U**

Preview

Read-Only Header 123412.3 %

Clear Apply Cancel Save

6. The Basic Formatting section includes the following options:

- Cell Format
- Text alignment (Left, Center, Right)
- Text Format
- Bold
- Italics
- Underline

Figure 10–11 Basic Formatting Options

Format

Apply to: **Measure**

Visible in...: **Sales & Margin** Type: **All**

Search for Measures...

- ☐ Markdown Sales Lift %
- ☐ Needed Sales Lift %
- ☒ Promo Discount %
- ☒ Promo Sales Lift %
- ☐ Recommended Markdown %
- ☐ Recommended Markdown Price
- ☐ Retail Price
- ☐ What-if Apply Price Point
- ☐ What-if Clr Price Disc %
- ☐ What-if Clr Price R
- ☐ What-if Clr Sales Lift %

2 selected Show Selected Select All Clear

Apply to Views: **Sales & Margin**

Current Selection **Styles** Exceptions

Measures: Promo Discount %, Promo Sales Lift %
Views: 4. Review Promotions Library, 5. Review Markdowns Library, 1. Plan Sales & Margin, sales&Margin, 3. What-if Apply Price Point

Basic Formatting

Cell Format:

Text Format:

Clear

Number Formatting

Quick Format: Prefix: Suffix: Scale: Decimal Places:

Show Separator: ☐

Clear

Header Formatting

Cell Format:

Text Format:

Preview: 123412.3 %

Apply

Cancel Save

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 Alignment (Left, Center, Right). By default, the text alignment is left for rows and center for columns.
 - Text Format
 - Bold
 - Italics
 - Underline

Figure 10–12 Header Formatting Options

Format

Apply to: **Measure**

Visible in...: Sales & Margin | Type: All

Search for Measures...

- ☐ Markdown Sales Lift %
- ☐ Needed Sales Lift %
- ☒ Promo Discount %
- ☒ Promo Sales Lift %
- ☐ Recommended Markdown %
- ☐ Recommended Markdown Price
- ☐ Retail Price
- ☐ What-if Apply Price Point
- ☐ What-if Clr Price Disc %
- ☐ What-if Clr Price R
- ☐ What-if Clr Sales Lift %

2 selected | Show Selected | Select All | Clear

Apply to Views: Sales & Margin

Current Selection | Styles | Exceptions

Basic Formatting

Cell Format: White | ≡ | ≡ | ≡ | Text Format: Black | **B** | *I* | U | Clear

Number Formatting

Quick Format: ▼ | Prefix: | Suffix: % | Scale: 0.01 | Decimal Places: 1 | ▼ | ▲ | Show Separator: ☐ | Clear

Header Formatting

Cell Format: Green | ≡ | ≡ | ≡ | Text Format: Black | **B** | *I* | U | Clear

Preview

Read-Only | **Header** | 123412.3 % | Apply

Cancel | Save

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

Format

Apply to **Measure** ×

Visible in... **Sales & Margin** Type **All**

Search for Measures...

- ☐ Markdown Sales Lift %
- ☐ Needed Sales Lift %
- ☒ Promo Discount %
- ☒ Promo Sales Lift %
- ☐ Recommended Markdown %
- ☐ Recommended Markdown Price
- ☐ Retail Price
- ☐ What-if Apply Price Point
- ☐ What-if Clr Price Disc %
- ☐ What-if Clr Price R
- ☐ What-if Clr Sales Lift %

2 selected [Show Selected](#) [Select All](#) [Clear](#)

Apply to Views **Sales & Margin**

Current Selection Styles Exceptions

Basic Formatting

Cell Format **White** Text Format **Black** **B** **I** **U**

[Clear](#)

Number Formatting

Quick Format **Prefix** **Suffix** **Scale** **Decimal Places**

Show Separator

[Clear](#)

Header Formatting

Cell Format **Green** Text Format **Black** **B** **I** **U**

[Clear](#)

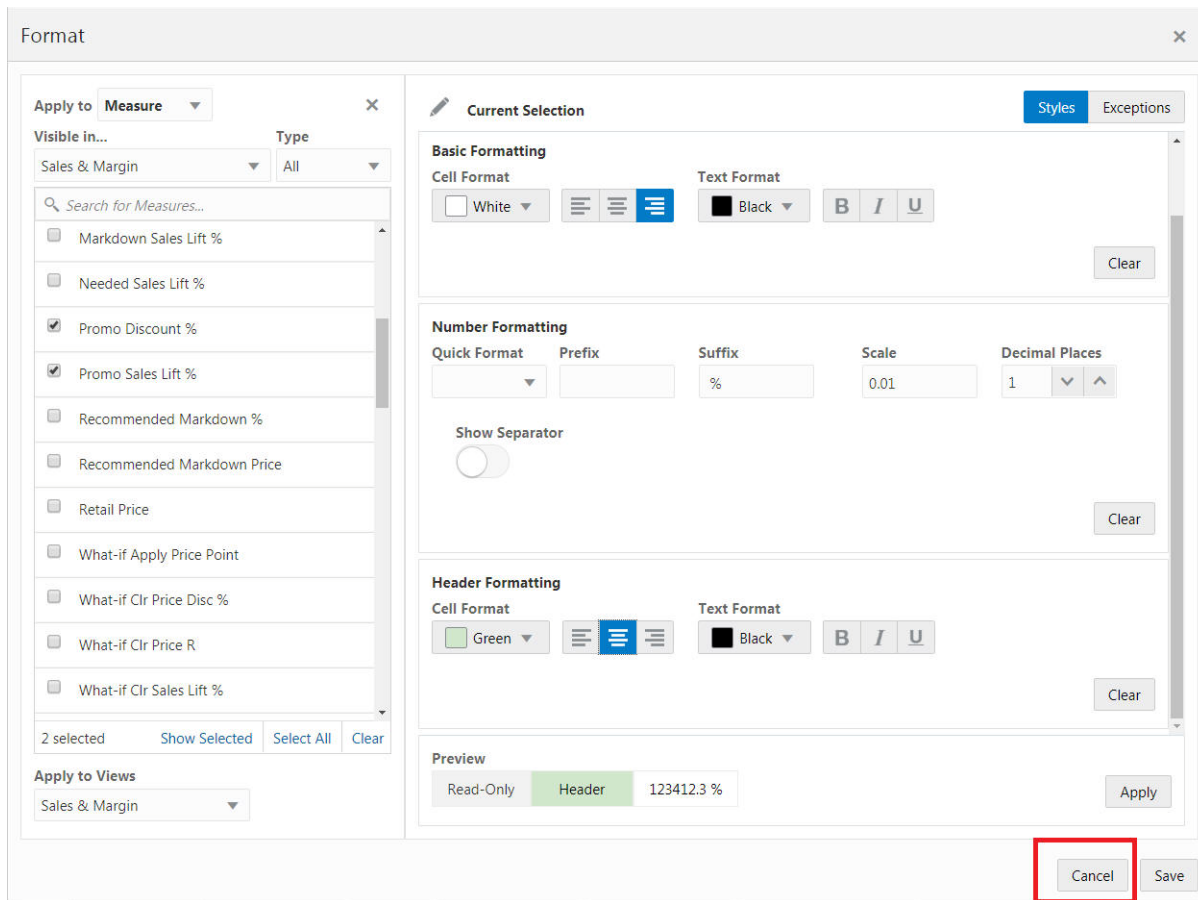
Preview

Read-Only **Header** **123412.3 %**

[Apply](#)

[Cancel](#) [Save](#)

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. On the left, there's a sidebar with 'Apply to: Measure' and a list of measures. The main area is titled 'Current Selection' and has tabs for 'Styles' and 'Exceptions'. The 'Number Formatting' section is highlighted with a red box. It contains the following fields:

- Quick Format:** A dropdown menu currently 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 '0'.
- Show Separator:** A toggle switch that is currently turned on.

Below the 'Number Formatting' section is the 'Header Formatting' section, which has similar options for cell and text formatting. At the bottom, the 'Preview' section shows a table with the following data:

Read-Only	Header	1,234

Buttons for 'Apply', 'Cancel', and 'Save' are located at the bottom right of the dialog.

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 highlighted. The 'Quick Format' dropdown menu is open, showing options: None, Currency, Percentage, Thousands, and Millions. The 'Prefix', 'Suffix', 'Scale', and 'Decimal Places' fields are also visible.

Format

Apply to: **Measure**

Visible in...: **Sales & Margin** Type: **All**

Search for Measures...

- ☐ Markdown Sales Lift %
- ☐ Needed Sales Lift %
- ☒ Promo Discount %
- ☒ Promo Sales Lift %
- ☐ Recommended Markdown %
- ☐ Recommended Markdown Price
- ☐ Retail Price
- ☐ What-if Apply Price Point
- ☐ What-if Clr Price Disc %
- ☐ What-if Clr Price R
- ☐ What-if Clr Sales Lift %

2 selected [Show Selected](#) [Select All](#) [Clear](#)

Apply to Views: **Sales & Margin**

Current Selection [Styles](#) [Exceptions](#)

Basic Formatting

Cell Format: **White** **B** **I** **U** Text Format: **Black** **B** **I** **U** [Clear](#)

Number Formatting

Quick Format **Prefix** **Suffix** **Scale** **Decimal Places**

Quick Format **None** **None** **1** **0** [Clear](#)

Header Formatting

Cell Format: **Green** **B** **I** **U** Text Format: **Black** **B** **I** **U** [Clear](#)

Preview

Read-Only **Header** **1,234** [Apply](#)

[Cancel](#) [Save](#)

- 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 the 'Format' dialog box with the 'Number Formatting' section active. The 'Prefix', 'Suffix', and 'Scale' fields are highlighted with a red box. The 'Prefix' field is empty, the 'Suffix' field contains 'k', and the 'Scale' field contains '1,000'. The 'Decimal Places' field is set to 0. The 'Show Separator' toggle is turned on. The 'Preview' section shows '1k'.

Format

Apply to: **Measure**

Visible in...: **Sales & Margin** Type: **All**

Search for Measures...

- ☐ Markdown Sales Lift %
- ☐ Needed Sales Lift %
- ☒ Promo Discount %
- ☒ Promo Sales Lift %
- ☐ Recommended Markdown %
- ☐ Recommended Markdown Price
- ☐ Retail Price
- ☐ What-if Apply Price Point
- ☐ What-if Clr Price Disc %
- ☐ What-if Clr Price R
- ☐ What-if Clr Sales Lift %

2 selected Show Selected Select All Clear

Apply to Views: **Sales & Margin**

Current Selection Styles Exceptions

Basic Formatting

Cell Format: **White** Text Format: **Black** **B** **I** **U**

Number Formatting

Quick Format: **Thousands** Prefix: Suffix: **k** Scale: **1,000** Decimal Places: **0**

Show Separator: ☒

Header Formatting

Cell Format: **Green** Text Format: **Black** **B** **I** **U**

Preview

Read-Only Header 1k

Cancel Save

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 screenshot shows the 'Format' dialog box with the following sections:

- Apply to:** Measure (dropdown)
- Visible in...** Sales & Margin (dropdown), **Type** All (dropdown)
- Search for Measures...** (text input)
- Measures List:**
 - ☐ Markdown Sales Lift %
 - ☐ Needed Sales Lift %
 - ☒ Promo Discount %
 - ☒ Promo Sales Lift %
 - ☐ Recommended Markdown %
 - ☐ Recommended Markdown Price
 - ☐ Retail Price
 - ☐ What-if Apply Price Point
 - ☐ What-if Clr Price Disc %
 - ☐ What-if Clr Price R
 - ☐ What-if Clr Sales Lift %
- 2 selected** | [Show Selected](#) | [Select All](#) | [Clear](#)
- Apply to Views:** Sales & Margin (dropdown)
- Current Selection:**
 - Basic Formatting:**
 - Cell Format:** White (dropdown), icons for alignment and text color
 - Text Format:** Black (dropdown), icons for bold, italic, and underline
 - [Clear](#)
 - Number Formatting:**
 - Quick Format:** None (dropdown)
 - Prefix:** (text input)
 - Suffix:** (text input)
 - Scale:** 1 (text input)
 - Decimal Places:** 2 (dropdown, highlighted with a red box)
 - Show Separator:** ☐ (toggle)
 - [Clear](#)
 - Header Formatting:**
 - Cell Format:** Green (dropdown), icons for alignment and text color
 - Text Format:** Black (dropdown), icons for bold, italic, and underline
 - [Clear](#)
- Preview:**

Read-Only	Header	Value
		1234.12

[Apply](#)

- [Cancel](#) | [Save](#)

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 screenshot shows the 'Format' dialog box with the 'Current Selection' tab active. The 'Number Formatting' section is expanded, and the 'Show Separator' toggle is highlighted with a red box. The toggle is currently turned on (blue). The 'Preview' section at the bottom shows a table with columns 'Read-Only', 'Header', and a value '1,234.12'.

Format

Apply to: **Measure**

Visible in...: **Sales & Margin** Type: **All**

Search for Measures...

- ☐ Markdown Sales Lift %
- ☐ Needed Sales Lift %
- ☒ Promo Discount %
- ☒ Promo Sales Lift %
- ☐ Recommended Markdown %
- ☐ Recommended Markdown Price
- ☐ Retail Price
- ☐ What-if Apply Price Point
- ☐ What-if Clr Price Disc %
- ☐ What-if Clr Price R
- ☐ What-if Clr Sales Lift %

2 selected Show Selected Select All Clear

Apply to Views: **Sales & Margin**

Current Selection Styles Exceptions

Basic Formatting

Cell Format: **White** Text Format: **Black** **B** **I** **U**

Number Formatting

Quick Format: **None** Prefix: Suffix: Scale: **1** Decimal Places: **2**

Show Separator ☒

Header Formatting

Cell Format: **Green** Text Format: **Black** **B** **I** **U**

Preview

Read-Only	Header	
		1,234.12

Apply

Cancel Save

Modifying Date and Time Formats

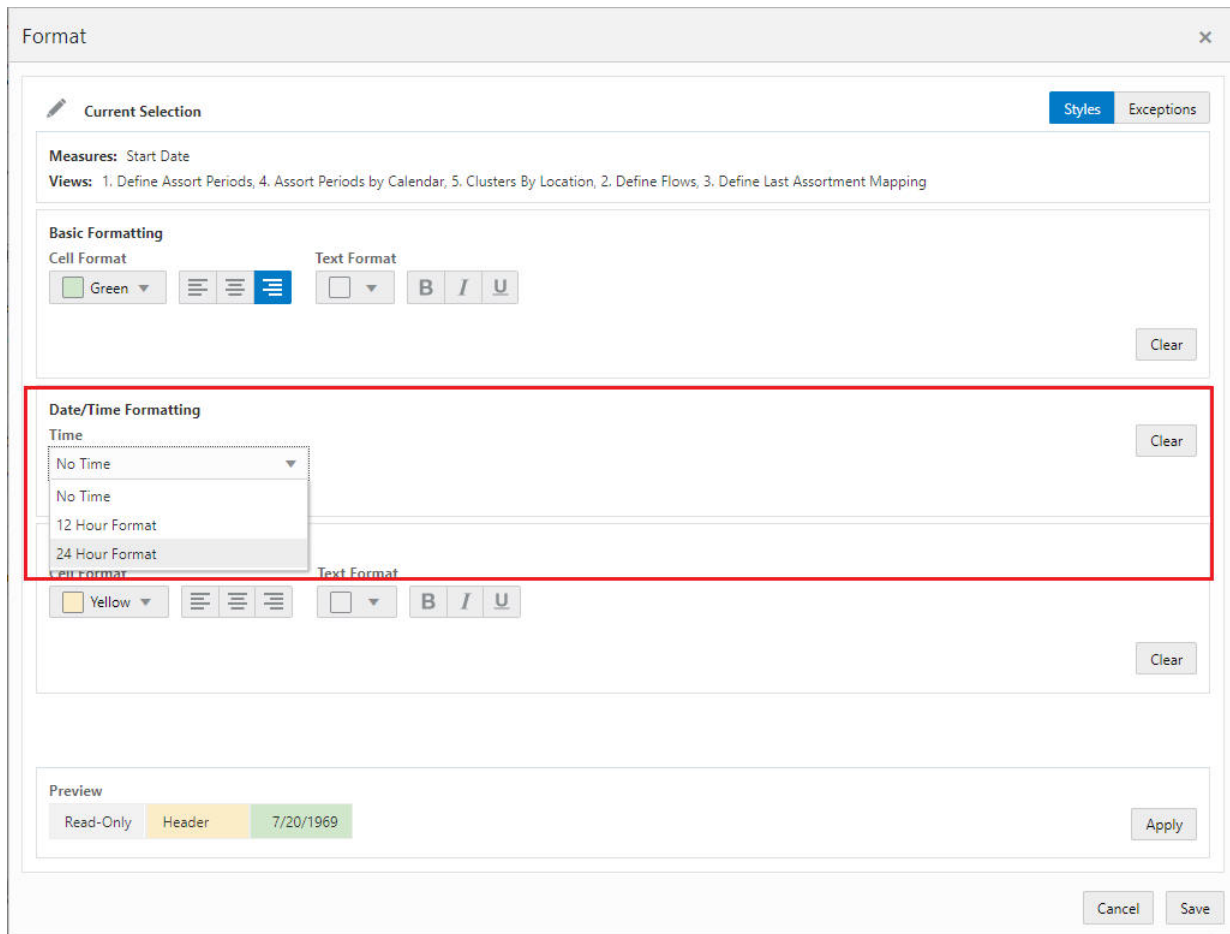
When you select date measures with the filter feature, you can modify the date and time formatting for those measures. When you are not using the filter feature, the measures that appear in the Measure field within the Apply Date/Time format section show only date measures that are visible in the current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

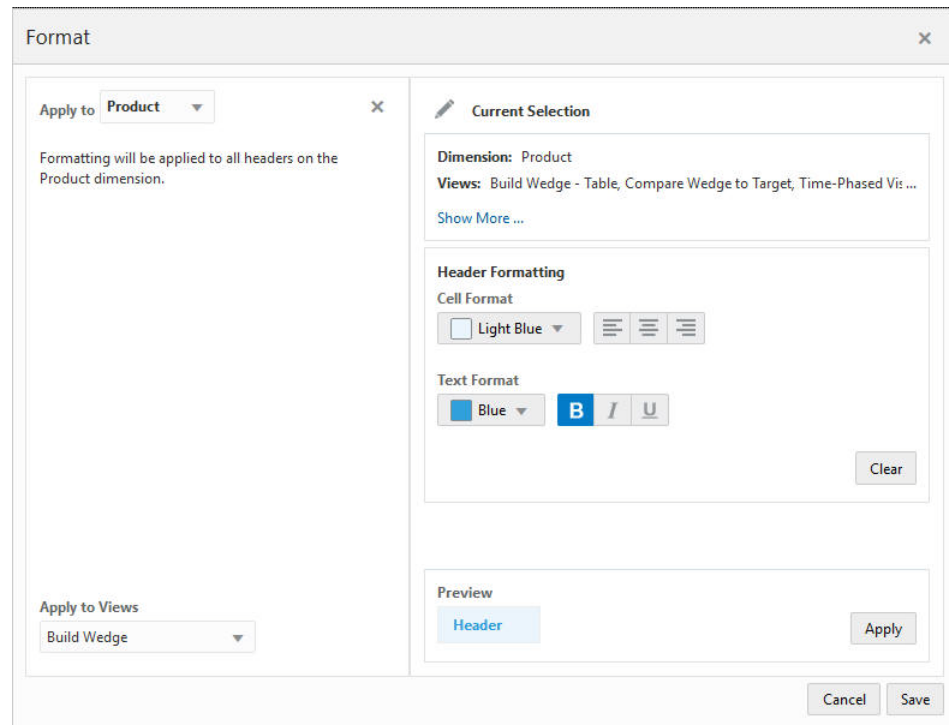


Formatting Dimension Headers

Dimension header formatting is used to format the column and row headers by dimension in order to visually identify the orientation and levels of the pivot table view.

To apply header formatting to a dimension, select the required dimension from the Apply to list. Select the views to which you want to apply the dimension header formatting. Review the selection and then use the formatting options to format the header. Preview and then click **Apply** and then **Save**.

To directly launch the Format dialog box for the required non-measure dimension by right click the row or column dimension header and select **Format**.

Figure 10-21 *Format Product Dimension Header*

Modifying Exceptions

Exception formatting is used to set up conditions to alter certain measure styles when the specified condition is met. This helps you to quickly notice a cell that meets these conditions. Exception formatting is used for numeric measure types. Exception formatting defines the styles to be applied to a cell's value when it falls outside a defined range.

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

Numeric Exception Formatting

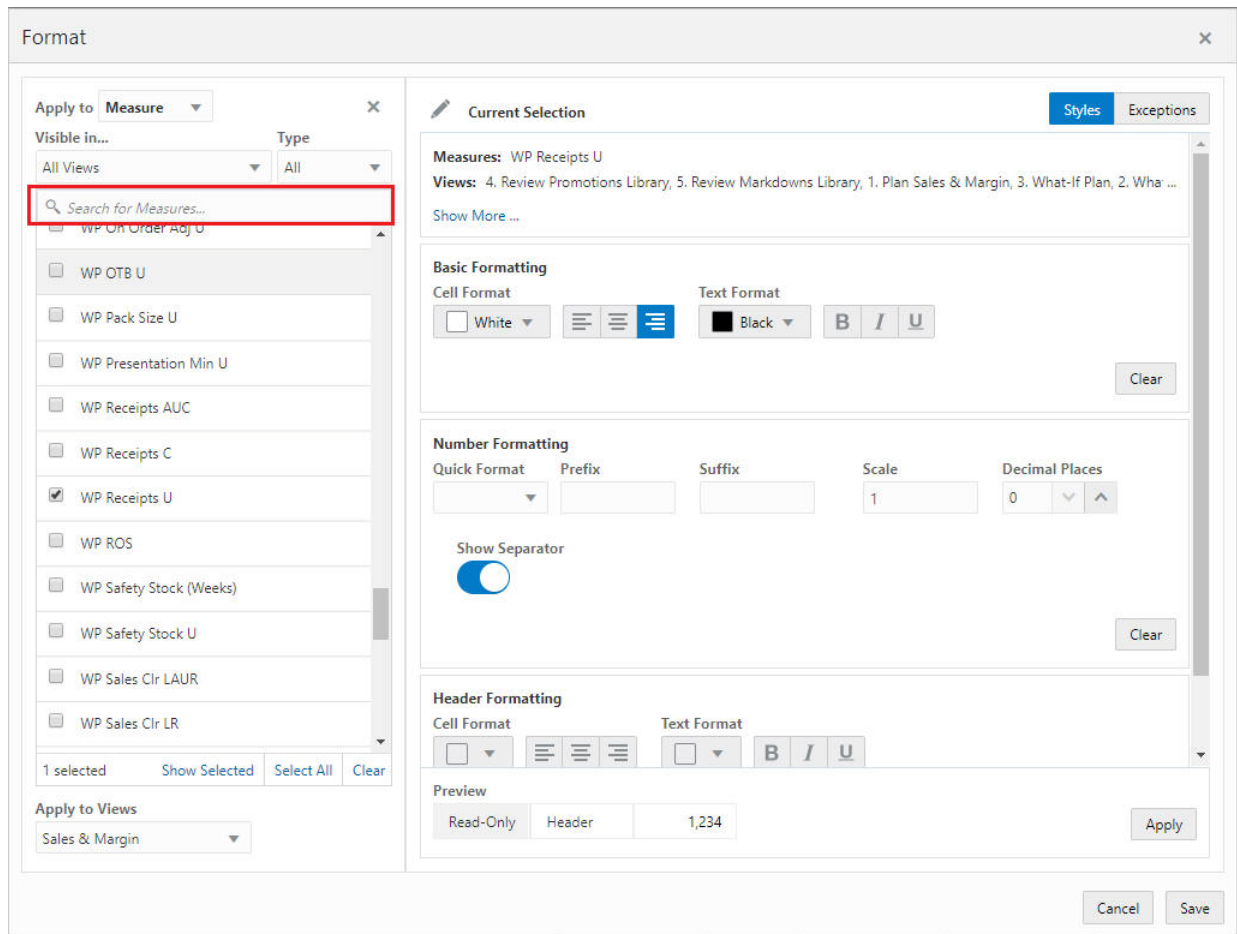
To apply exception formatting, click the **Exceptions** tab of the Format dialog box and complete the following steps:

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

Figure 10–22 Exception Tab for Number Formats

The screenshot shows the 'Format' dialog box with the 'Exceptions' tab selected. The left pane is divided into two sections: 'Visible in...' and 'Type'. Under 'Visible in...', there is a dropdown menu set to 'Receipts by Size'. Under 'Type', there is a dropdown menu set to 'All'. Below these are five checkboxes, all of which are unchecked: 'Sales by Size U', 'Sales U % to Size Range', 'WP Receipts by Size U', 'WP Receipts U diff to Size', and 'WP Size Profile %'. At the bottom of the left pane, it says 'No selections' and 'Select All'. Below the left pane is an 'Apply to Views' section with a dropdown menu set to 'Receipts by Size'. The right pane is titled 'Current Selection' and has two tabs: 'Styles' and 'Exceptions'. The 'Exceptions' tab is active. It contains two sections: 'Measures' and 'Views'. The 'Measures' section says 'No measures selected'. The 'Views' section lists three views: '1. Review Size Profile', '2. Review Sales by Size', and '3. Receipts by Size'. Below these are two sections: 'User-Defined Exceptions' and 'System Exceptions', both of which are currently empty. At the bottom right of the dialog box are 'Cancel' and 'Save' buttons.

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 10–23 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 10–24 Exception Condition Values

The screenshot shows the 'Format' dialog box with the 'Exceptions' tab selected. The 'Current Selection' section displays 'Measures: WP Receipts by Size U' and 'Views: 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size'. The 'User-Defined Exceptions' section contains a 'Numeric Exceptions' table. The 'Condition' column has a dropdown menu open, showing options: 'none', 'Less Than or Equal', 'Greater Than or Equal', and 'Equal'. The 'Value' column is empty. The 'Cell Format' column has a dropdown menu. The 'Text Format' column has a dropdown menu and buttons for Bold (B), Italic (I), and Underline (U). The 'Preview' column shows the value '1234.56'. The 'System Exceptions' section is empty. The 'Apply to Views' dropdown is set to 'Receipts by Size'. Buttons for 'Cancel' and 'Save' are at the bottom right.

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

Figure 10–25 Cell Format Settings

Format

Apply to: **Measure**

Visible in...: 3. Receipts by Size | Type: All

☒ WP Receipts by Size U
☐ WP Receipts U diff to Size

1 selected | [Select All](#) | [Clear](#)

Apply to Views: Receipts by Size

Current Selection

Measures: WP Receipts by Size U
Views: 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size

User-Defined Exceptions

Numeric Exceptions ☐ Prioritize over System Alerts

Condition	Value	Cell Format	Text Format
Less Than or Equal	1234.56	<div>White Black Light Grey Green Red Yellow Light Blue Orange</div>	<div>B I U</div>

[+ Add Condition](#)

System Exceptions

[Clear](#) [Apply](#)

[Cancel](#) [Save](#)

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

Figure 10–26 Text Format Fields

Format

Apply to: **Measure** ×

Visible in...: 3. Receipts by Size ▼ Type: All ▼

- ☒ WP Receipts by Size U
- ☐ WP Receipts U diff to Size

1 selected Select All Clear

Apply to Views: Receipts by Size ▼

Current Selection Styles **Exceptions**

Measures: WP Receipts by Size U
Views: 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size

User-Defined Exceptions

Numeric Exceptions ☐ Prioritize over System Alerts

Condition	Value	Cell Format	Text Format
Less Than or Equal ▼		Black ▼	▼ <div> Black Grey Green Red Blue Orange Teal </div>

Preview
Black

+ Add Condition

System Exceptions

Cancel Save

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

Figure 10-27 Apply Format Exception

The screenshot shows the 'Format' dialog box with the 'Exceptions' tab selected. The 'Current Selection' section displays the following information:

- Measures:** WP Receipts by Size U
- Views:** 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size

The 'User-Defined Exceptions' section contains a 'Numeric Exceptions' table with the following configuration:

Condition	Value	Cell Format	Text Format
Less Than or Equal	20	Black	Grey

A preview of the formatted value '20' is shown below the table. The 'Apply' button is highlighted with a red box.

11. Click **Apply** or **Save** to apply the formats.

- **Apply** applies the formatting, but it does not close the Format dialog box.
- **Save** applies the formatting and closes the Format dialog box.

Figure 10–28 Apply and Save Formats

Format

Apply to: **Measure**

Visible in...: 3. Receipts by Size | Type: All

☒ WP Receipts by Size U
☐ WP Receipts U diff to Size

1 selected | Select All | Clear

Apply to Views: Receipts by Size

Current Selection | Styles | **Exceptions**

Measures: WP Receipts by Size U
Views: 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size

User-Defined Exceptions

Numeric Exceptions ☐ Prioritize over System Alerts

Condition	Value	Cell Format	Text Format
Less Than or Equal	20	Black	Grey B I U

Preview: 20

+ Add Condition

Clear | Apply

System Exceptions

Cancel | **Save**

Boolean Exception Formatting

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

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

Figure 10–29 Boolean Exception Tab for Formatting

The screenshot shows the 'Format' dialog box with the 'Boolean Exception Tab for Formatting' selected. The dialog is divided into two main panels.

Left Panel (Apply to Measure):

- Apply to:** Measure (dropdown)
- Visible in...:** All Views (dropdown)
- Type:** Boolean (dropdown)
- Measures List:**
 - ☐ AP CP Assort Core
 - ☐ Assortment Weeks for IP In-Season
 - ☐ CP Assorted Item
 - ☐ WP Approve to CP
 - ☐ WP Assorted Item
 - ☐ WP Seed Plan
- Footer:** No selections (text), [Select All](#) (button)
- Apply to Views:** Receipts by Size (dropdown)

Right Panel (Current Selection):

- Current Selection:**
 - Measures:** No measures selected
 - Views:** 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size
- Exceptions:**
 - User-Defined Exceptions:** (empty list)
 - System Exceptions:** (empty list)

Buttons: Cancel, Save

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

Figure 10–30 *Filter Measure for Exception*

Format

Apply to Measure

Visible in...
All Views

Type
Boolean

☐ AP CP Assort Core

☐ Assortment Weeks for IP In-Season

☐ CP Assorted Item

☒ WP Approve to CP

☐ WP Assorted Item

☐ WP Seed Plan

1 selected

Select All

Clear

Apply to Views
Receipts by Size

Current Selection

Measures: WP Approve to CP

Views: 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size

User-Defined Exceptions

Boolean Exceptions

+ Add Condition

Clear

Apply

System Exceptions

Cancel

Save

Figure 10–31 Add User-Defined Boolean Exception

Format

Apply to Measure

Visible in... All Views

Type Boolean

AP CP Assort Core

Assortment Weeks for IP In-Season

CP Assorted Item

☒ WP Approve to CP

WP Assorted Item

WP Seed Plan

1 selected Select All Clear

Apply to Views Receipts by Size

Current Selection

Measures: WP Approve to CP

Views: 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size

User-Defined Exceptions

Boolean Exceptions

☐ Prioritize over System Alerts

Condition Equals

Value none

Cell Format

Preview

Clear Apply

System Exceptions

Cancel

Save

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

Figure 10–32 Applies To Field for Boolean Exception

Format

Apply to: **Measure** ×

Visible in...: **All Views** ▼ Type: **Boolean** ▼

☐ AP CP Assort Core

☐ Assortment Weeks for IP In-Season

☐ CP Assorted Item

☒ WP Approve to CP

☐ WP Assorted Item

☐ WP Seed Plan

inventory

1. Inventory Parameters

Define Product Rollup

Define Filter/Rollup

Receipts by Size

Receipts by Size

1. Review Size Profile

2. Review Sales by Size

3. Receipts by Size

Receipts by Size

Current Selection ✎ Styles Exceptions

Measures: WP Approve to CP

Views: 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size

User-Defined Exceptions

Boolean Exceptions ☐ Prioritize over System Alerts

Condition: **Equals** ▼ Value: **none** ▼ Cell Format: ☐ ▼ Preview: ☐

Clear **Apply**

System Exceptions

Cancel **Save**

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

In the Condition field, select one of two options:

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

Figure 10–33 Boolean Exception Condition Value

Format

Apply to Measure

Visible in... All Views

Type Boolean

AP CP Assort Core

Assortment Weeks for IP In-Season

CP Assorted Item

☒ WP Approve to CP

WP Assorted Item

WP Seed Plan

1 selected

Apply to Views

Receipts by Size

Select All

Clear

Current Selection

Measures: WP Approve to CP

Views: 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size

User-Defined Exceptions

Boolean Exceptions

Condition

Equals

Value

none

none

True

False

Cell Format

Preview

Clear

Apply

Prioritize over System Alerts

System Exceptions

Cancel

Save

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

Formatting 10-33

Figure 10–34 Boolean Exception Cell Format

Format

Apply to: **Measure**

Visible in...: All Views | Type: Boolean

- ☐ AP CP Assort Core
- ☐ Assortment Weeks for IP In-Season
- ☐ CP Assorted Item
- ☒ WP Approve to CP
- ☐ WP Assorted Item
- ☐ WP Seed Plan

1 selected | [Select All](#) | [Clear](#)

Apply to Views: Receipts by Size

Current Selection | Styles | **Exceptions**

Measures: WP Approve to CP
Views: 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size

User-Defined Exceptions

Boolean Exceptions ☐ Prioritize over System Alerts

Condition	Value	Cell Format	Preview
Equals	True	Black	

[Clear](#) [Apply](#)

System Exceptions

[Cancel](#) [Save](#)

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

Figure 10–35 Apply Boolean Exception

The screenshot shows the 'Format' dialog box with the 'Exceptions' tab selected. The 'Current Selection' section displays the following information:

- Measures:** WP Approve to CP
- Views:** 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size

Under the 'User-Defined Exceptions' section, a 'Boolean Exception' is configured with the following settings:

- Condition:** Equals
- Value:** True
- Cell Format:** Black
- Preview:** A black cell with a white checkmark.

The 'Apply' button is highlighted with a red box. At the bottom of the dialog, there are 'Cancel' and 'Save' buttons.

10. Click **Apply** or **Save** to apply the formats.

- **Apply** applies the formatting, but it does not close the Format dialog box.
- **Save** applies the formatting and closes the Format dialog box.

Figure 10–36 Apply and Save Boolean Exceptions

Format

Apply to: Measure

Visible in...: All Views

Type: Boolean

1 selected

Select All Clear

Apply to Views: Receipts by Size

Current Selection

Measures: WP Approve to CP

Views: 1. Review Size Profile, 2. Review Sales by Size, 3. Receipts by Size

User-Defined Exceptions

Boolean Exceptions ☐ Prioritize over System Alerts

Condition	Value	Cell Format	Preview
Equals	True	Black	

Clear Apply

System Exceptions

Cancel Save

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.

Workspaces are often purged using a weekly cadence for reasons that include freeing space from infrequently used workbooks, system patches, reclassifications and other hierarchy changes, and refreshing elapsed weeks. This can disrupt the workflow. You require a weekly refresh of the actuals and the hierarchy positions. However, you also require access to the current state of your workspace so that you can start work each day from where you left off, regardless of whether or not system administration occurred. This is achieved by saving the format changes you made with the segment rather than with the workspace.

The list below includes some of the types of formatting saved with the segment rather than the workspace.

- The formatting is saved with the segment in all situations where a workspace save is performed.
- Current step, sub-step, and view to display upon re-opening.

- Added views.
- View dimension layout formatting (which axis each dimension is on in the view).
- Show /hide positions, dimension levels, and measures.
- Measure profiles, currently displayed, and saved measure profiles.
- Workspace view layout (1, 2x, and 4x).
- Measure formatting (bold, italic, color, and scale).
- Exception formatting.
- User-defined exception formats.
- Real-time alert (that is, system formatting) formats.
- Visual Planning
- Top filters selection
- Card layout (large card vs. small card)

In addition, your segment formatting is persisted after a patch, so that you do not have to reapply formats to your plan.

Note: Because your work space can potentially be deleted (or is not upgradeable), only committed changes will be preserved when you rebuild the workspace.

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 user only.
- **For My Group:** <Group Name> - 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. Users can save to any of the groups they are members of; they can only pick up formats from their primary group.
- **Workspace Template:** Applies the formatting to all future workspaces created for this task for all system users. The formatting changes are augmented with the existing personal or group formatting. Since these are global changes to formatting for a given workbook template, you can make a single set of customizations that are then available to all other users of the system to use. Only administrators are allowed to save the workspace template formats.

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

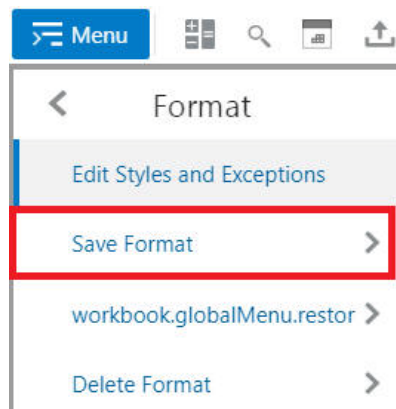
1. If Save Formats/Only For Me exists for the user opening the workspace, use the last saved Only For Me formats.
2. If no Save Formats/Only For Me exists, use Save Formats/For My Groups: <Group Name>.
3. If no Save Formats/For My Groups: <Group Name> exists, use the workspace template.

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

To save formats, complete the following steps:

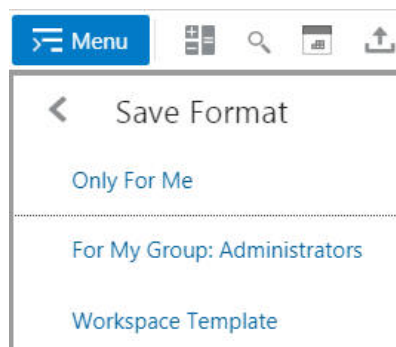
1. On the Quick Access toolbar, click **Menu** and click **Save Format**.

Figure 10–37 Save Format



2. Select one of the Format Level options:
 - **Only for Me:** Applies formatting to all future workspaces created for this task for only the original user.
 - **For My Group:** <Group Name> - 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.
 - **Workspace Template:** Applies the formatting to all future workspaces created for this task for all system users.

Figure 10–38 Format Level for Saving Format



Deleting Formats

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

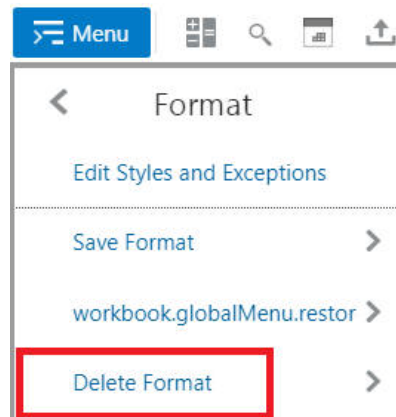
- **Only for Me:** If this option is used by any user, the Only for Me saved format is deleted for the current user only. No other users Only for Me saved format is deleted.
- **For My Group: <Group Name>** If this option is used by any user, the For My Group: <Group Name> saved format is deleted for all users in the group. It is possible for user A to delete this group format saved by user B. If you delete the Group or Workspace format, then you cannot use Restore Format to restore that format.
- **Workspace Template:** Deletes the workspace template format for all system users. This option is only available to Admin users.

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

To delete formats, complete the following steps:

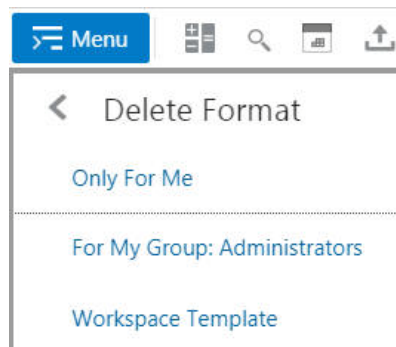
1. On the Quick Access toolbar, click **Menu** and click **Delete Format**.

Figure 10–39 Delete Format



2. Select one of the Delete Format options:
 - **Only for Me:** If this option is used by any user, the Only for Me saved format is deleted for the current user only. No other users Only for Me saved format is deleted.
 - **For My Group: <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. If you delete the Group or Workspace format, then you cannot use Restore Format to restore that format.
 - **Workspace Template:** Deletes the workspace template format for all system users. This option is only available to Admin users.

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

Figure 10–40 Delete Format Options

Restoring Formats

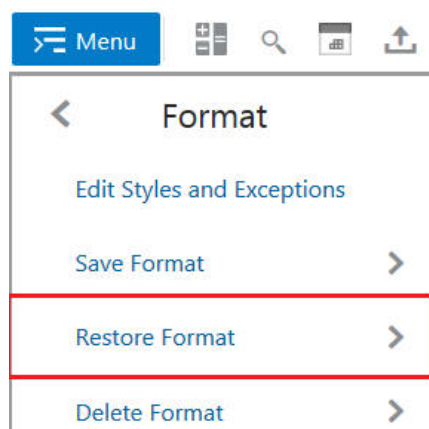
Restore Format is used to restore the format from the workspace template or from a group, so that you can be aligned with your team. From time to time your team-lead or planning manager will make changes to the Group template that represent best practice business processes for the team. You can align 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.

You cannot restore the format if the format is already deleted for that group or workspace template.

To restore the format, complete the following steps:

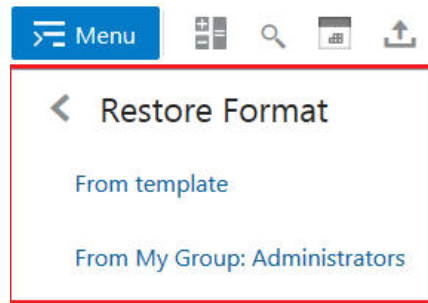
1. From the Quick Access toolbar, click **Menu** and then **Restore Format**.

Figure 10–41 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 10–42 *Restore Format Options*

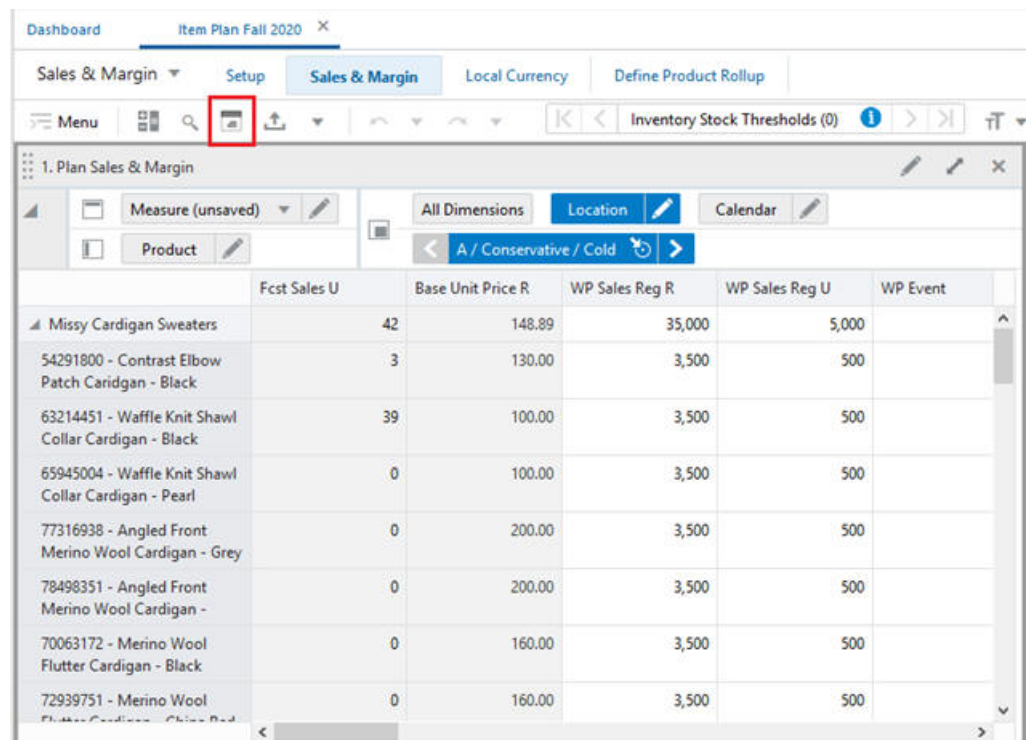


When you use an RPAS CE solution, you can export data in the current slice of a view to Microsoft Excel or to a text file. You can also print it.

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

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

Figure 11-1 Export Option



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

Figure 11–2 Export Dialog Box

The screenshot shows the 'Export' dialog box with the 'File Setup' tab selected. The dialog has three tabs: 'File Setup', 'Page Setup', and 'Print Setup'. The 'File Setup' tab contains the following fields and options:

- File Name ***: A text input field containing 'Inseason Plan Missy 2020_2. What-If Price P'.
- View**: A dropdown menu showing '2. What-If Price Point Setup'.
- File Type**: Two radio buttons, '.xlsx' (selected) and 'txt'.
- Format Type**: Three radio buttons, 'As Displayed' (selected), 'Formatted', and 'Raw Data'.
- Include Images**: A checked checkbox.
- Image Size**: A dropdown menu showing 'default'.
- Width**: A numeric input field showing '100' with up/down arrows.
- Height**: A numeric input field showing '100' with up/down arrows.
- Maintain Aspect Ratio**: An unchecked checkbox.

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

Export

File Setup Page Setup Print Setup

File Name * Inseason Plan Missy 2020_2. What-If Price P

View 2. What-If Price Point Setup

File Type

☐ .xlsx

☒ txt

Separator ,

Description Labels

Format Type

☒ As Displayed

☐ Formatted

☐ Raw Data

☒ Include Images

- 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

Export

File Setup Page Setup Print Setup

File Name * Inseason Plan Missy 2020_2. What-If Price P

View 2. What-If Price Point Setup

File Type

☒ .xlsx

☐ txt

Format Type

☒ As Displayed

☐ Formatted

☐ Raw Data

☒ Include Images

Image Size default

Width 100

Height 100

☐ Maintain Aspect Ratio

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

The screenshot shows the 'Export' dialog box with the following fields and options:

- File Name ***: Inseason Plan Missy 2020_2. What-If Price P
- View**: 2. What-If Price Point Setup
- File Type**:
 - ☒ .xlsx
 - ☐ txt
- Format Type** (highlighted with a red box):
 - ☒ As Displayed
 - ☐ Formatted
 - ☐ Raw Data
- Include Images**: ☒
- Image Size**: default
- Width**: 100
- Height**: 100
- Maintain Aspect Ratio**: ☐

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

Only the formatting specified in RPAS CE 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 RPAS CE. 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 RPAS CE.

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, RPAS CE does not export the image details.

Figure 11–6 File Setup Include Images

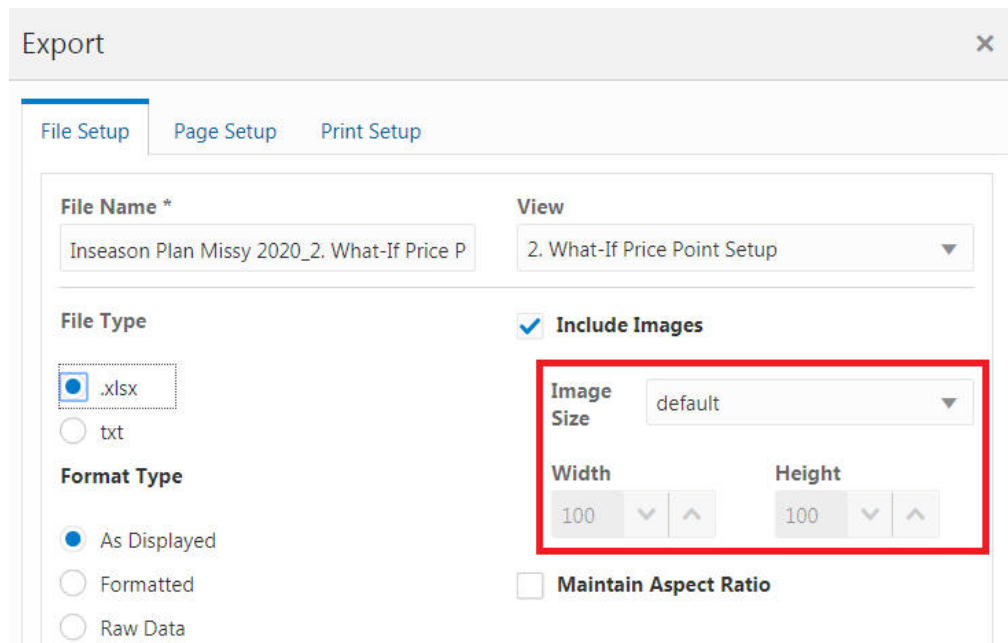
The screenshot shows the 'Export' dialog box with the 'File Setup' tab selected. The 'File Name' field contains 'Inseason Plan Missy 2020_2. What-If Price P'. The 'View' dropdown is set to '2. What-If Price Point Setup'. Under 'File Type', '.xlsx' is selected. Under 'Format Type', 'As Displayed' is selected. The 'Include Images' checkbox is checked and highlighted with a red rectangle. The 'Image Size' dropdown is set to 'default'. The 'Width' and 'Height' are both set to '100'. The 'Maintain Aspect Ratio' checkbox is unchecked.

6. Select the image size of the exported images from the 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



The screenshot shows the 'Export' dialog box with the 'File Setup' tab selected. The 'File Name' field contains 'Inseason Plan Missy 2020_2. What-If Price P'. The 'View' dropdown is set to '2. What-If Price Point Setup'. The 'File Type' section has '.xlsx' selected. The 'Format Type' section has 'As Displayed' selected. The 'Include Images' checkbox is checked. The 'Image Size' dropdown is set to 'default'. The 'Width' and 'Height' fields are both set to 100. The 'Maintain Aspect Ratio' checkbox is unchecked.

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

Figure 11–8 Image Size Large Option

The screenshot shows the 'Export' dialog box with the 'File Setup' tab selected. The 'File Name' field contains 'Inseason Plan Missy 2020_2. What-If Price P'. The 'View' dropdown is set to '2. What-If Price Point Setup'. Under 'File Type', '.xlsx' is selected. Under 'Format Type', 'As Displayed' is selected. A red box highlights the 'Include Images' section, which is checked. The 'Image Size' dropdown is set to 'large'. Below it, 'Width' and 'Height' are both set to 400. The 'Maintain Aspect Ratio' checkbox is unchecked.

- 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

The screenshot shows the 'Export' dialog box with the 'File Setup' tab selected. The 'File Name' field contains 'Create Assortment Missy2020 - What_If_Sce'. The 'View' dropdown is set to 'Determine # of Options'. Under 'File Type', '.xlsx' is selected. Under 'Format Type', 'As Displayed' is selected. A red box highlights the 'Include Images' section, which is checked. The 'Image Size' dropdown is set to 'custom'. Below it, 'Width' is set to 120 and 'Height' is set to 200. A tooltip message 'Enter a number between 20 and 400.' is displayed over the width input field. The 'Maintain Aspect Ratio' checkbox is unchecked.

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

The screenshot shows the 'Export' dialog box with the 'File Setup' tab selected. The 'File Name' field contains 'Create Assortment Missy2020 - What_If_Sce'. The 'View' dropdown is set to 'Determine # of Options'. Under 'File Type', the '.xlsx' radio button is selected. The 'Format Type' section has 'As Displayed' selected. The 'Include Images' checkbox is checked. The 'Image Size' dropdown is set to 'custom'. The 'Width' and 'Height' fields are both set to 100. The 'Maintain Aspect Ratio' checkbox is checked and highlighted with a red rectangular box.

8. Use the Block View Export option to export all the hierarchy level in a single export file. It helps the user to filter the data conveniently in excel. Users can export the file as **.xlsx** or **.txt**.

Figure 11–11 Block View Export Option

The screenshot shows the 'Export' dialog box with the 'File Setup' tab selected. The 'File Name' field contains 'sm_CA_2. Assign Attributes'. The 'View' dropdown is set to '2. Assign Attributes'. Under 'File Type', the '.xlsx' radio button is selected. The 'Format Type' section has 'As Displayed' selected. The 'Include Images' checkbox is checked. The 'Image Size' dropdown is set to 'default'. The 'Width' and 'Height' fields are both set to 100. The 'Maintain Aspect Ratio' checkbox is unchecked. The 'Block View Export' checkbox is checked and highlighted with a red rectangular box.

Page Setup

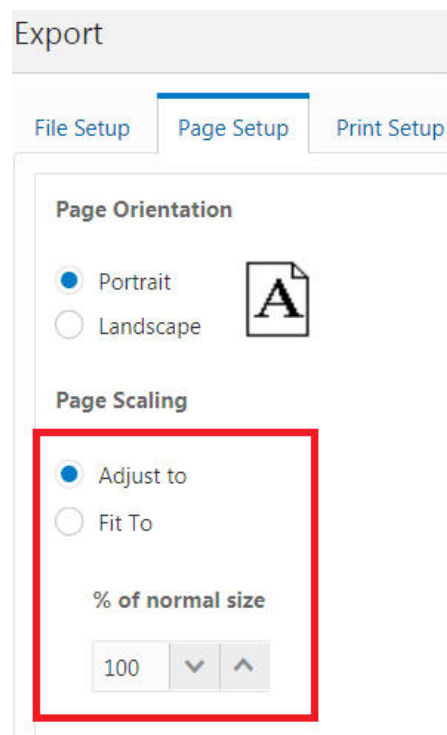
You can use the Page Setup tab to specify the page orientation, page scaling, and the header/footer. These options are described in this section.

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 11–12 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 11–13 Page Setup Fit To

The screenshot shows the 'Export' dialog box with the 'Page Setup' tab selected. The 'Page Orientation' section has 'Portrait' selected. The 'Page Scaling' section has 'Fit To' selected, which is highlighted by a red rectangle. Below 'Fit To', there are two spin boxes: 'Page(s) wide' and 'Page(s) tall', both set to '1'.

Export

File Setup Page Setup Print Setup

Page Orientation

☒ Portrait

☐ Landscape

Page Scaling

☐ Adjust to

☒ Fit To

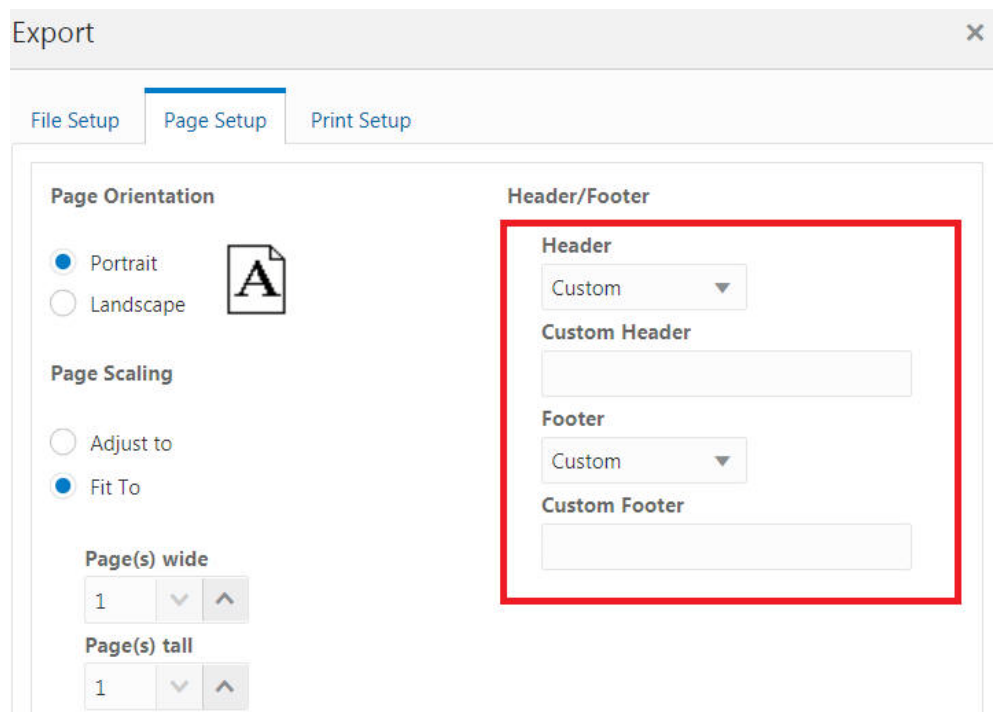
Page(s) wide

1

Page(s) tall

1

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 11–14 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 11–15 Print Setup Margins

Export

File Setup Page Setup **Print Setup**

Margins

Top *
1 ▼ ▲

Bottom *
1 ▼ ▲

Left *
0.5 ▼ ▲

Right *
0.5 ▼ ▲

Page Breaks
☐ Break Rows on

Sheet
☐ Print Gridlines

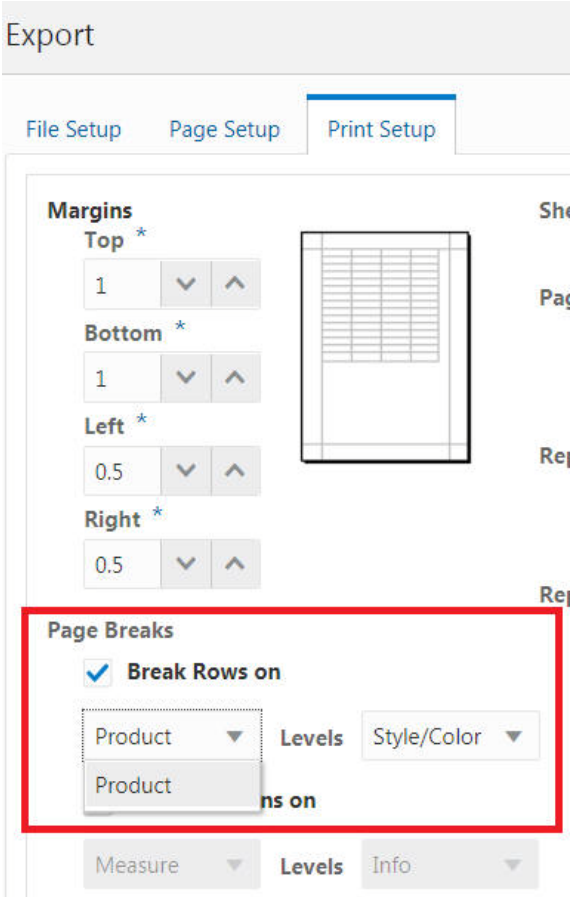
Page Order
☒ Down, then over
☐ Over, then down

Repeat Row Headers
☒ Every Page
☐ Only Left Most Page(s)

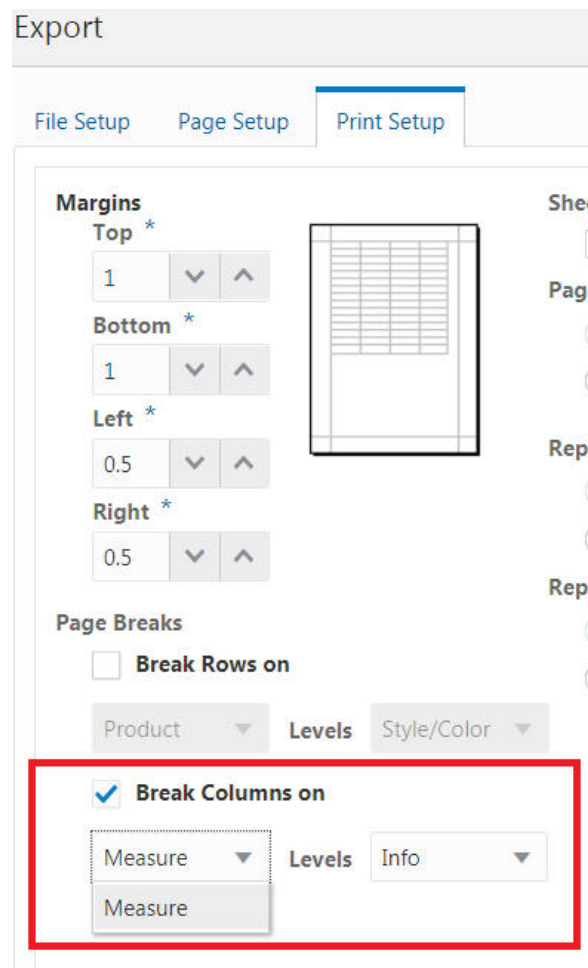
Repeat Column Headers
☒ Every Page
☐ Only Top Most Page(s)

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.

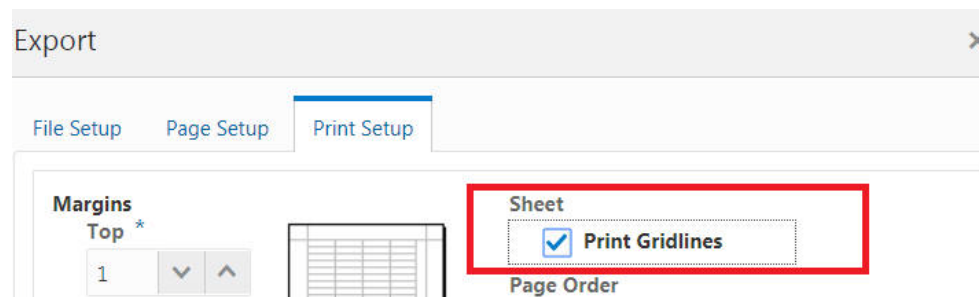
Figure 11-16 Print Setup Page Break Rows On



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.

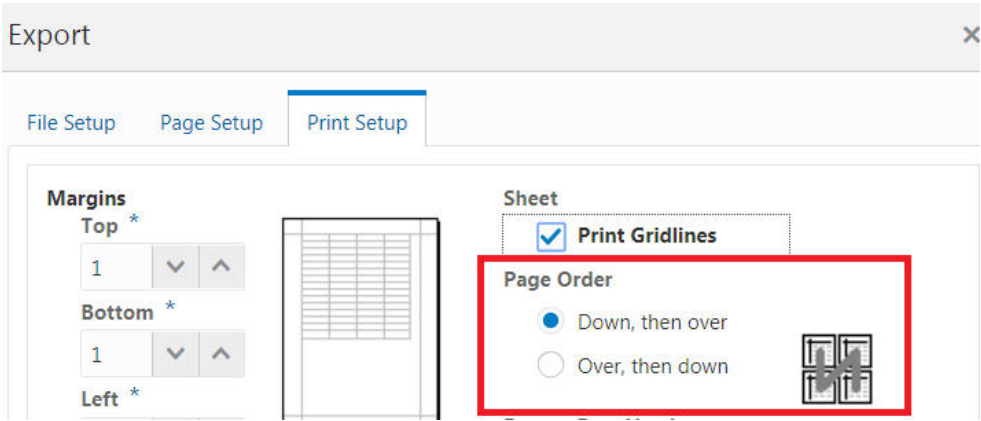
Figure 11–17 Print Setup Break Columns On

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

Figure 11–18 Print Setup Print Gridlines

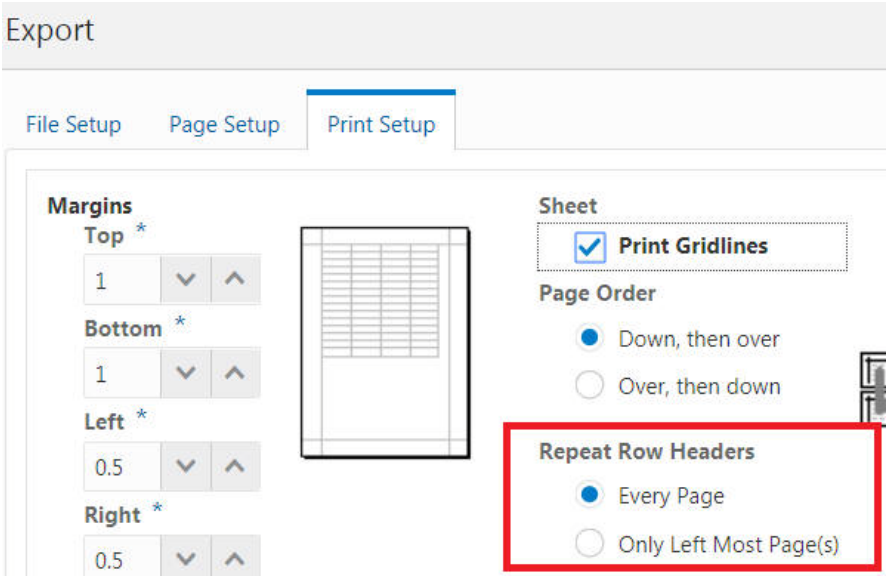
Use Page Order to specify either Down, then over or Over, the down.

Figure 11–19 *Print Setup Page Order*



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

Figure 11–20 *Print Setup Repeat Row Headers*



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

Figure 11–21 *Print Setup Repeat Column Headers*

Export

File Setup Page Setup **Print Setup**

Margins


Top *
1

Bottom *
1

Left *
0.5

Right *
0.5

Page Breaks
☐ Break Rows on



Sheet
☒ Print Gridlines

Page Order
☒ Down, then over
☐ Over, then down

Repeat Row Headers
☒ Every Page
☐ Only Left Most Page(s)

Repeat Column Headers
☒ Every Page
☐ Only Top Most Page(s)

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 11–22 File Setup Export as Read Only

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

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

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 the **rpasConfig.properties** file.

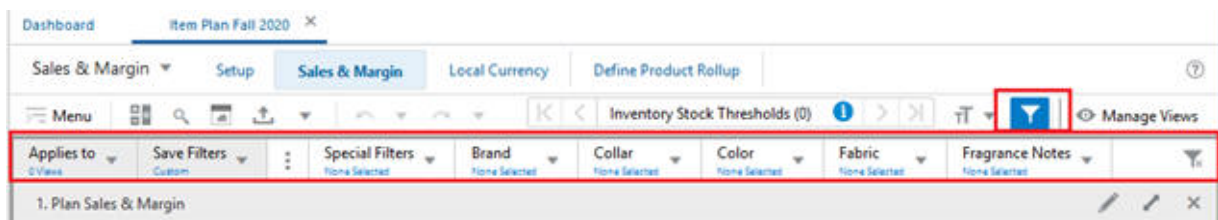
Workspace Filters

This chapter describes workspace filters.

Workspace Filters

Workspace filters are shown in [Figure 12-1](#).

Figure 12-1 Workspace Filters



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. 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.

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.

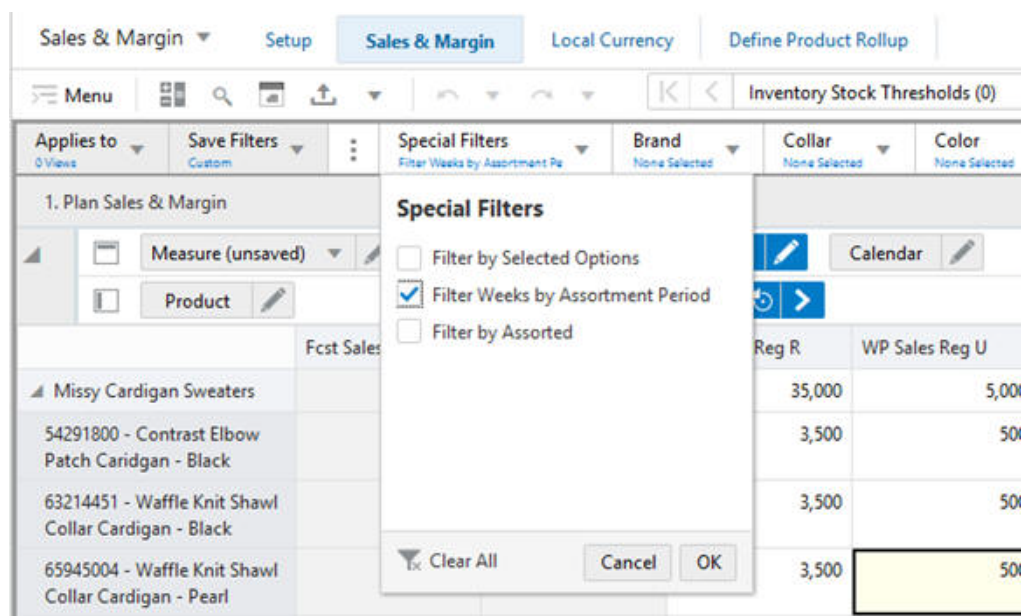
When a special filter is applied to a view, the positions in the filter dimensions (X-axis and Y-axis) that fulfill the requirements of the filter for the particular position of the driving dimension (Z axis) are the only ones shown in the view. All other positions are hidden automatically.

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.

Special Filters Definition

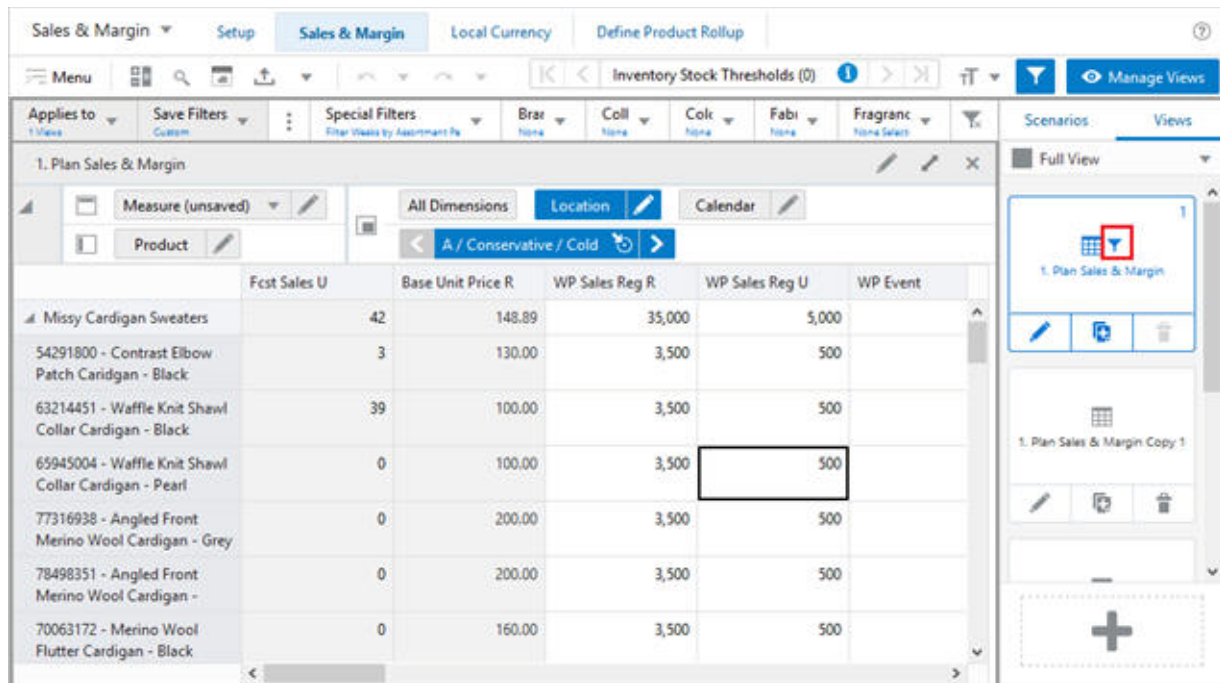
You can select the Special Filters Definition that must apply. The Special Filters Definition is also known as the Position Query Definition (PQD).

Figure 12–2 Select Filter



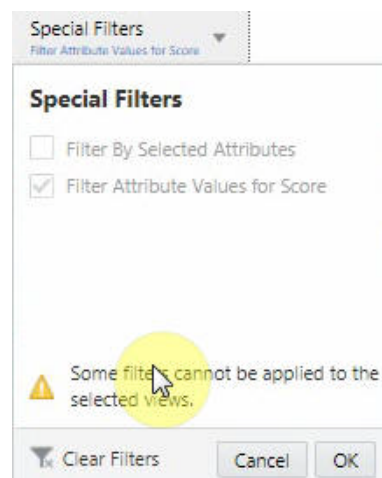
You can select the views that the selected filter must apply to either one view, more views, or all views under the step. Special filters that have the same measure and query level combination are represented as one option and are applied to multiple views in a step.

Figure 12–3 Select View to Apply Special Filter



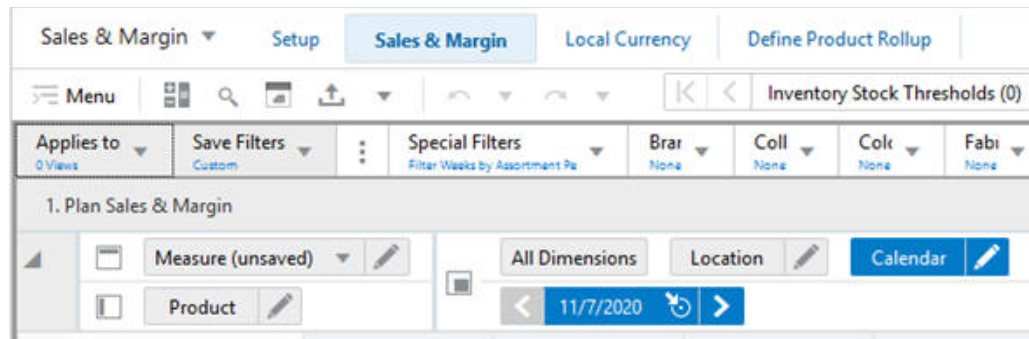
If the special filter is not applicable for some views, then you see the message *Some Filters cannot be applied to the selected views* under the special filter LOV with options. Click **OK** to run the special filter.

Figure 12–4 Special Filters Not Applicable



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 12–5 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.

Applying Special Filters

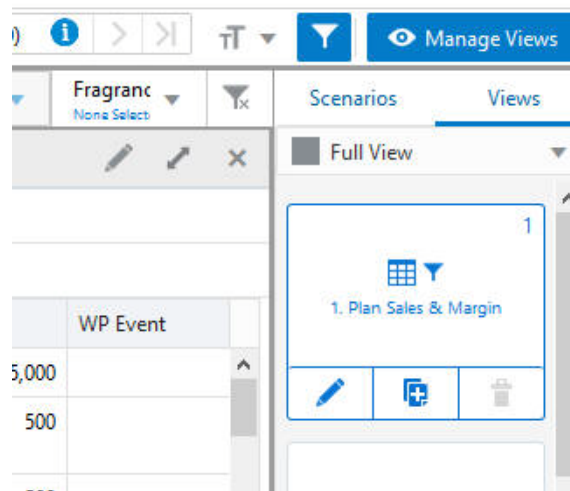
Once the special filter is applied, the positions that do not match the criteria are hidden. You can verify positions using Edit View to view the positions in the hidden area. Any positions that were manually hidden previously will be unhidden if they match the special filter.

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.

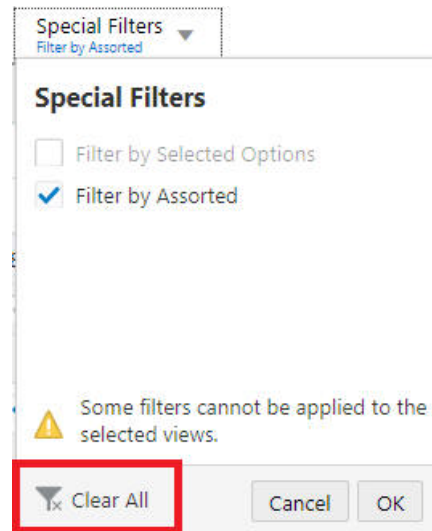
Special filters operate by filtering the positions of the dimensions on the row and the column axes based upon the selected position of one or more dimension on the page axis. As the selected position on the page axis changes, the set of visible row and column positions will update automatically.

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.

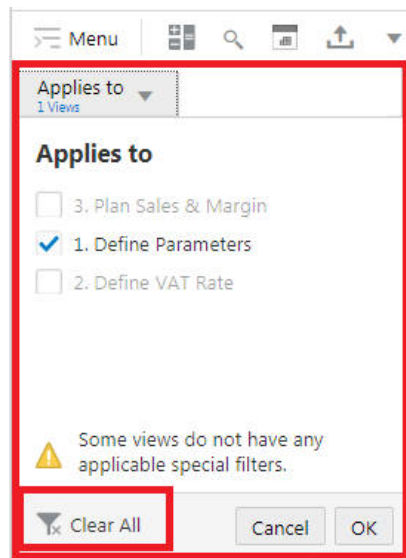
Note: Special filters are auto-applied when the workbook is built.

Figure 12–6 Verify Positions with Edit View

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

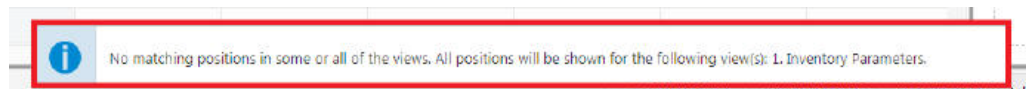
Figure 12–7 Clear Special Filters

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 Views Selection

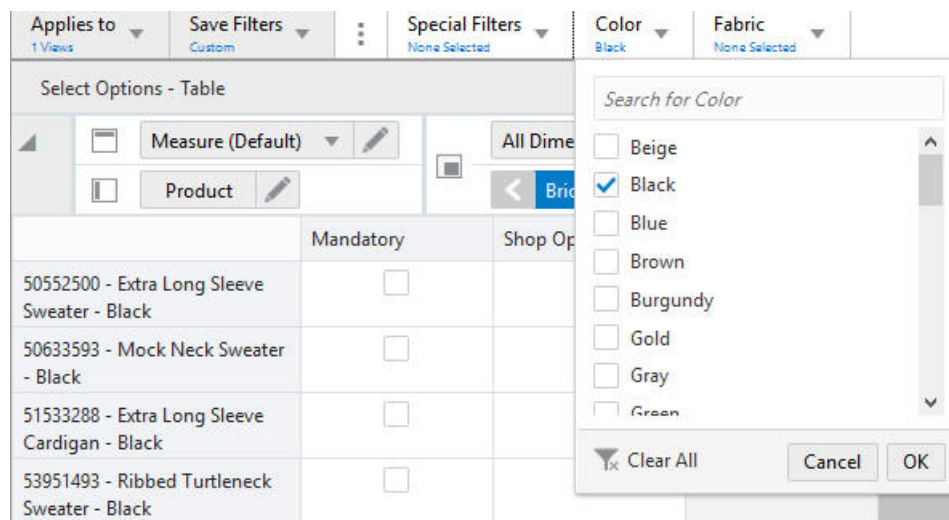
No Special Filter Matches

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 12–9 No Special Filter Matches

Attribute Filters

Some applications support business practices that are heavily attribute driven. For these applications, the user may want to examine products organized by their attributes instead of products organized by their regular hierarchical structure. Attribute filters can be used to filter by any number of attributes on the fly in order to quickly and efficiently target specific information. Attribute filters are helpful in cases when a user wants to retain the traditional product roll-up scheme but simply filter the set of visible positions to those that meet certain attribute-based requirements.

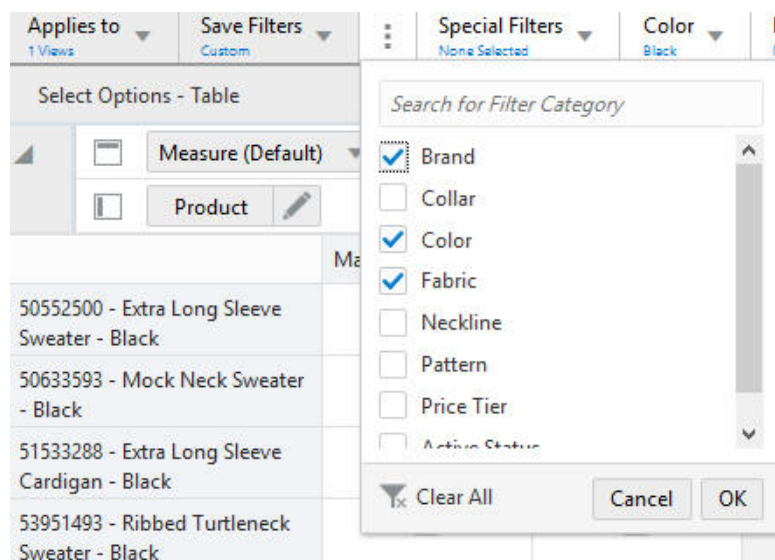
Figure 12-10 Attribute Filters

The filtering of positions based on attributes can be done through the Edit View show/hide position functionality but the attribute filters provide an easy and a convenient way and are simple to initiate and clear.

Attribute filters are present, along with the special filters, in the workspace Filters bar and can be used to apply, modify, and remove position filters based upon the attribute values of the positions.

Attribute Filter Category

You can select or hide the attribute filters from the Filter Category selection menu. The number of categories selected as filters cannot exceed five. If this value is exceeded, the OK button will be disabled. The first five attribute filters are displayed on the filter bar by default.

Figure 12-11 Attribute Filters Category

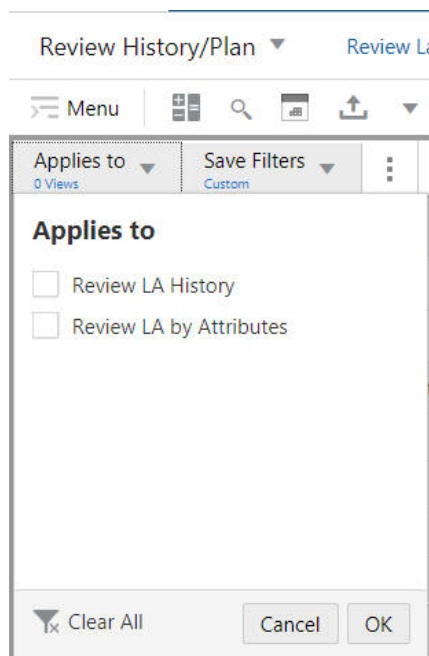
You can also search for the Filter Category. The **Clear All** button can be used to clear the selections. Click **OK** to see the selected filters on the bar. Special Filters cannot be hidden, as they might contain always on filters.

Note: Hiding a filter category will also remove its applied filters. It is assumed that the attributes are unique across levels, that is, the same attribute cannot exist in multiple levels.

Applying Attribute Filters

You can select the views that the selected attribute filter must apply to: either one view, a number of views, or all views under the tab. Click **OK** to run the attribute filter. Once the attribute filter is applied, the positions that do not match the criteria are hidden. You can verify the 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 attribute filter.

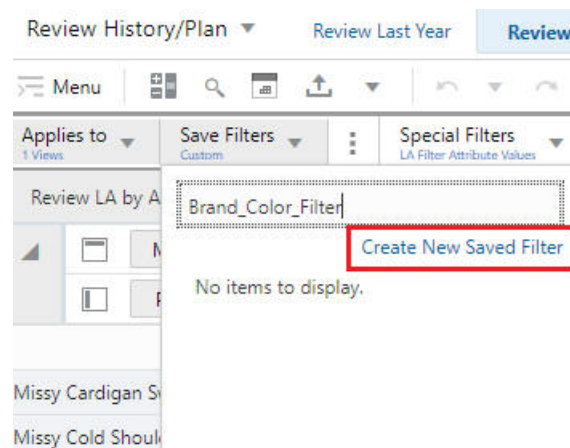
Figure 12–12 Apply Attribute Filters



When the attribute filter is turned on, a filter icon is applied to the view in the view management drawer. Attribute filters operate by filtering the positions of the dimensions on the row or column axes, based upon the selected attribute of one or more dimensions.

Saving Attribute Filters

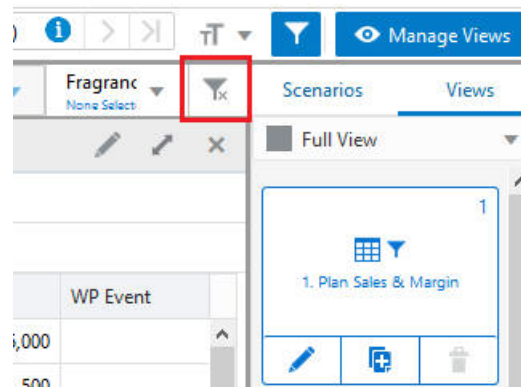
Once you have selected the attribute filters and their values, you can save the filter selections for later use. Saved Filter represents a combination of attribute filters only; it does not contain special filters or views.

Figure 12-13 Save Attribute Filters

To create a new saved filter, type in the filter name and then click **Create New Saved Filter**. Clicking here adds Brand_Color_Filter to the list of saved filters. To select an existing saved filter, select it from the list of saved filters.

Clear Workspace Filters

You can clear all the workspace filters applied by clicking the Filter icon in the Quick Access Toolbar, clicking the Clear All button on the right of the filter bar.

Figure 12-14 Clear Workspace Filters

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 placeholder maintenance activities on the position.

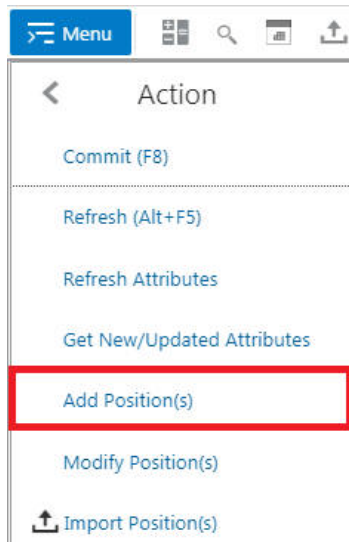
Note that Placeholder Maintenance is also referred to as Dynamic Position Maintenance (DPM).

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

Add Position

Dimension: Product

Level: Style (dropdown menu open showing: Style, Style/Color, Item)

Number of Positions to Add: 1

Label Prefix:

☐ Use Like Position

Assign Attributes

No available attributes for the selected level(s).

Cancel OK

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

Figure 13–3 Add Positions Context Menu

ORACLE

Dashboard

Define Assortment

Menu

Create Options

Measure

Product

Missy 3/4 Sleeve

96880516 - Sheer Hem Top - Raisnette

99087419 - V-Neck Silk Soft White

Missy Cardigan Sweat

54291800 - Contrast Ell Patch Caridgan - Black

63214451 - Waffle Knit

Context Menu:

- Resize Height/Width
- Format
- Add Position(s)
- Import Position(s)
- Apply Position Filter
- Expand
- Collapse
- Expand All
- Collapse All
- Lock Selected Rows
- Unlock Selected Rows
- Unlock All Positions
- Manage Attributes
- Show Images
- Show Attributes
- Copy Row

Cost	IMU %
44.95	
44.95	
0.00	
61.08	
53.59	
37.88	

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

Figure 13–4 Add Position

Add Position [X]

Dimension: **Product** ▼

Level: **Style/Color** ▼

Number of Positions to Add: **1** ▼ ▲

Label Prefix:

☐ Use Like Position

🔍

Assign Attributes [Select All](#)

<input type="checkbox"/> Brand	Dylan Rose ▼
<input type="checkbox"/> Collar	Shawl ▼
<input type="checkbox"/> Color	Maroon ▼
<input type="checkbox"/> Fabric	Cashmere ▼
<input type="checkbox"/> Neckline	Scoop Neck ▼
<input type="checkbox"/> Pattern	Embellished ▼
<input type="checkbox"/> Active Status	Non-Active ▼

Cancel **OK**

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

Figure 13–5 Add Product

Add Product

Style/Color

Actions View + - Hierarchy Company

Style/Color	Style	Sub-Class	Class	Dep
DPM	Merino Wool Flutter Cardigan	Missy Cardigan Sweaters	Missy Sweaters	Missy

Attributes

View Copy Attributes from Like Position Get New/Updated Attributes

Level	Attribute Name	Value
Style/Color		
	Brand	
	Collar	
	Color	
	Fabric	

Cancel OK

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.

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.

Figure 13–6 Add Position

Add Position

Dimension: Product
Level: Style/Color

Number of Positions to Add: 1
Label Prefix: DPM

☒ Use Like Position
54291800 - Contrast Elbow Patch Caridgan - Black

Assign Attributes [Select All](#)

<input type="checkbox"/> Brand	21 Sunset
<input type="checkbox"/> Collar	Regular
<input type="checkbox"/> Color	Black
<input type="checkbox"/> Fabric	Viscose Nylon
<input type="checkbox"/> Neckline	Boat Neck
<input type="checkbox"/> Pattern	Solid
<input type="checkbox"/> Active Status	Active since 2018

Cancel OK

4. Copy the attribute information from the like position selected to the new positions and click **Copy attributes from Like Position**. In this way, you do not have to enter the information manually on an attribute-by-attribute basis.

Figure 13–7 Copy Attributes

The screenshot shows the 'Add Product' dialog box. At the top, there's a 'Style/Color' section with a hierarchy table. Below it, the 'Attributes' section is visible, featuring a 'View' dropdown and a button labeled 'Copy Attributes from Like Position' which is highlighted with a red rectangle. To the right of this button is a link 'Get New/Updated Attributes'. Below these are columns for 'Level', 'Attribute Name', and 'Value'. The 'Level' column shows 'Style/Color' expanded, revealing attributes like Brand, Collar, Color, and Fabric. At the bottom right are 'Cancel' and 'OK' buttons.

Style/Color	Style	Sub-Class	Class	Dep
DPM	Merino Wool Flutter Cardigan	Missy Cardigan Sweaters	Missy Sweaters	Missy

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.

5. Click **OK** and review the new placeholder position that has been created. The placeholder positions are colored hyperlinks to help you quickly identify placeholders. The hyperlink opens the Modify Positions dialog box.

Figure 13–8 Placeholder Position

	Like Option	Retail Price	Cost	IMU %	Select Size Range
Missy Cardigan Sweaters	54291800 - Contrast Elbow Patch Cardigan - Black	130.00	53.59	58.8%	
54291800 - Contrast		130.00	53.59	58.8%	
63214451 - Waffle Knit		100.00	37.88	62.1%	
65945004 - Waffle Knit		100.00	41.98	58.0%	
70063172 - Merino Wool		160.00	67.12	58.1%	
72939751 - Merino Wool		160.00	67.12	58.1%	
73137693 - Merino Wool		160.00	67.12	58.1%	
77316938 - Angled Front		200.00	80.65	59.7%	
78498351 - Angled Front		200.00	80.65	59.7%	
DPM0000006	54291800 - Contrast Elbow Patch Cardigan - Black	0.00	0.00	0.0%	
DPM0000029	54291800 - Contrast Elbow Patch Cardigan - Black	0.00	0.00	0.0%	
DPM0000030	54291800 - Contrast Elbow Patch Cardigan - Black	0.00	0.00	0.0%	
DPM0000031	73137693 - Merino Wool Flutter Cardigan - Dark Pearl	0.00	0.00	0.0%	

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.

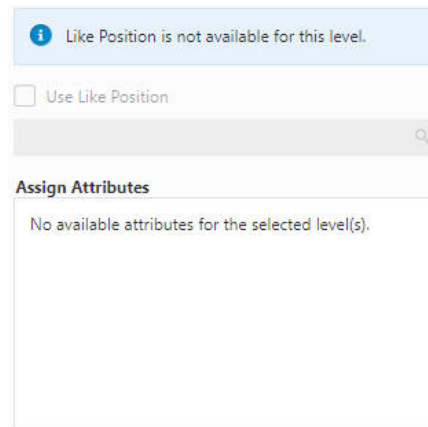
Like Item Support in Placeholder Maintenance

You can use Placeholder Maintenance to copy the information from a similar position (Like Item) to the new positions. It facilitates the copying of attribute and metric information from Like Positions 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 choosing 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*.

Figure 13–9 Use Like Position

The screenshot shows the 'Add Position' dialog box. It has a title bar with a close button. Inside, there are two dropdown menus: 'Dimension' set to 'Product' and 'Level' set to 'Style/Color'. Below these are 'Number of Positions to Add' (set to 1) and 'Label Prefix' (set to 'DPM'). A red rectangle highlights the 'Use Like Position' section, which includes a checked checkbox, a search bar, a list of items, and an 'Active Status' dropdown. The list of items includes: 50334589 - Short Sleeve Sweater - Lacquer, 50552500 - Extra Long Sleeve Sweater - Black, 50633593 - Mock Neck Sweater - Black, 51524128 - Mock Neck Sweater - Navy, 51533288 - Extra Long Sleeve Cardigan - Black, 51963371 - Ribbed Turtleneck Sweater - Prussian, 52535633 - Ribbed Turtleneck Sweater - Green, and 53951493 - Ribbed Turtleneck Sweater - Black. At the bottom right are 'Cancel' and 'OK' buttons.

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 the measure and the attributes are not present, the user sees the message *Like Position is not available for this level*. The Like position check box is unavailable.

Figure 13–10 Like Position Not Available

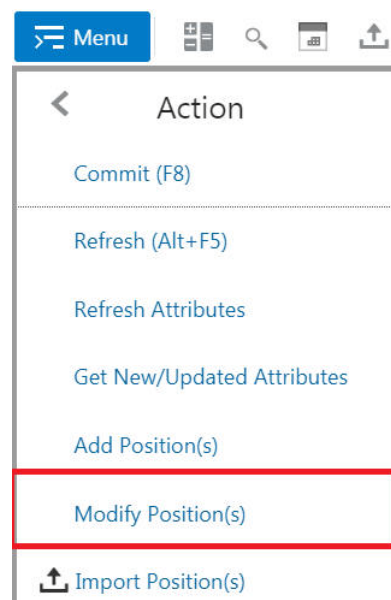
Modifying an Informal Position

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.

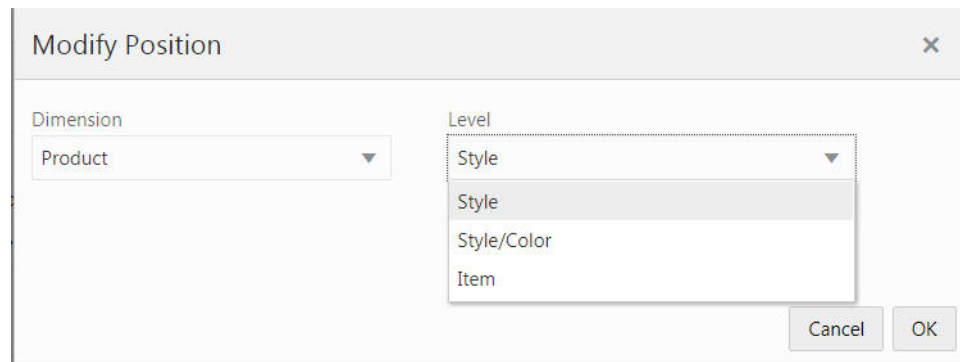
Note: Only dynamic positions can be modified using the DPM feature. The Modify menu is not visible if there are no dynamic positions in the workspace.

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 13–11 Modify Positions

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

Figure 13–12 Modify Position



3. Alternatively, you can right click one of the positions and select **Modify Position(s)** in the right click menu or simply click the placeholder position hyperlink. The Modify Position dialog box shows the positions for modifying at the launched dimension.
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 13–13 Modify Product

Style/Color	Style	Sub-Class	Class	D
DPM0000006	Merino Wool Flutter Cardigan	Missy Cardigan Sweaters	Missy Sweaters	Missy
DPM0000029	Merino Wool Flutter Cardigan	Missy Cardigan Sweaters	Missy Sweaters	Missy
DPM0000030	Merino Wool Flutter Cardigan	Missy Cardigan Sweaters	Missy Sweaters	Missy
DPM0000031	Merino Wool Flutter Cardigan	Missy Cardigan Sweaters	Missy Sweaters	Missy
DPM0000032	Merino Wool Flutter Cardigan	Missy Cardigan Sweaters	Missy Sweaters	Missy
DPM0000033	Merino Wool Flutter Cardigan	Missy Cardigan Sweaters	Missy Sweaters	Missy

Level	Attribute Name	Value
Style/Color		
	Brand	21 Sunset
	Collar	Regular
	Color	Black
	Fabric	Viscose Nylon

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

Note: You can modify the parent position for an informal position only if the parent belongs to the same sub-domain. If you try to modify a parent level for an informal position and if the selected parent does not belong to the same sub-domain, then RPAS CE displays an error message:

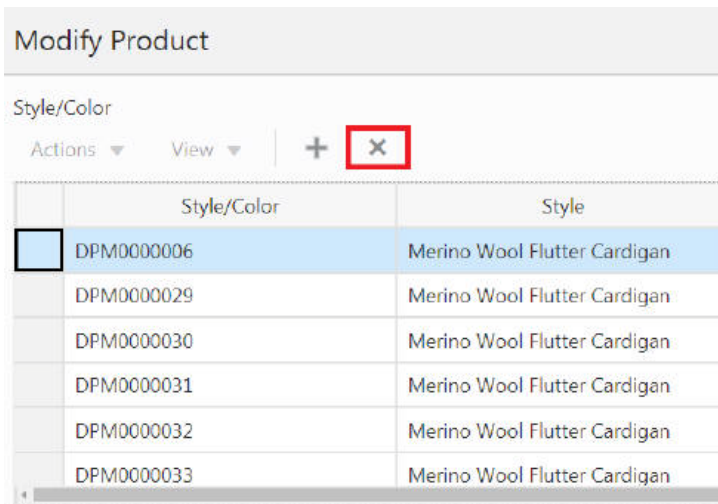
Position [position_name] on [level] does not exists in current sub domain. DPM process cannot continue.

Deleting 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 13–14 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 13–15 After Deletion

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

Figure 13–16 Placeholder Position Removed

	Like Option		Retail Price	Cost
Missy Cardigan Sweaters	73137693 - Merino Wool Flutter Cardigan - Dark Pearl	▼	151.25	62.01
54291800 - Contrast		▼	130.00	53.59
63214451 - Waffle Knit		▼	100.00	37.88
65945004 - Waffle Knit		▼	100.00	41.98
70063172 - Merino Wool		▼	160.00	67.12
72939751 - Merino Wool		▼	160.00	67.12
73137693 - Merino Wool		▼	160.00	67.12
77316938 - Angled Front		▼	200.00	80.65
78498351 - Angled Front		▼	200.00	80.65
DPM0000029	54291800 - Contrast Elbow Patch Cardigan - Black	▼	0.00	0.00
DPM0000030	54291800 - Contrast Elbow Patch Cardigan - Black	▼	0.00	0.00
DPM0000031	73137693 - Merino Wool Flutter Cardigan - Dark Pearl	▼	0.00	0.00

Importing Placeholder Positions

Import Position(s) is used to manually import a list of placeholder positions that you have already entered in an Excel (.xlsx) file format. It loads the positions listed in the file to the Add Product dialog box for validation and highlights errors when corrections are required. This functionality can be used for the bulk creation of placeholder positions.

When buyers have clarity regarding the placeholder positions that must be created, including items, styles, attributes, and attribute values, they can enter these details into an Excel file. Then they can create the placeholder positions in the system by importing the file created earlier.

To import placeholder positions, click the Import Position(s) shortcut icon on Quick Access Toolbar. You can also click the Import Position(s) menu item in Action Menu or perform a contextual launch of Import Position(s).

Figure 13–17 Import Placeholder Icon

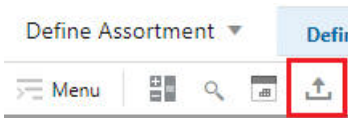


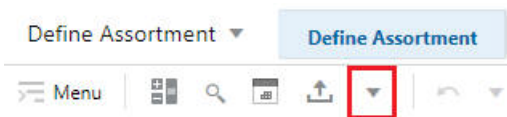
Figure 13–18 Imported Placeholder Positions

Add Product						
Style/Color						
Actions ▾		View ▾		Hierarchy < Company >		
	Style/Color	Style	Sub-Class	Class	Department	
	NewProd1	Contrast Elbow Patch Caridgan	Missy Cardigan Sweaters	Missy Sweaters	Missy	Missy
	NewProd2	Contrast Elbow Patch Caridgan	Missy Cardigan Sweaters	Missy Sweaters	Missy	Missy

When you click the Import Position(s) icon or menu, you are redirected to select the file for upload. The selected file is uploaded to the server and processed. If the import fails, you can see the error message *The file import failed. Check the file format and try again.* If the import is successful, you see the message *Item list imported successfully.* The Add Positions dialog box opens populated with the imported files positions. You can edit, modify, or delete the imported informal position records. If validation failures occur, you will see and additional message.

Click **Download DPM Import File Template**, next to the **Import Position(s)** button on Quick Access Toolbar, to download the file template to use to populate an Excel file with placeholder positions and their information.

Figure 13–19 Download Placeholder Template Icon



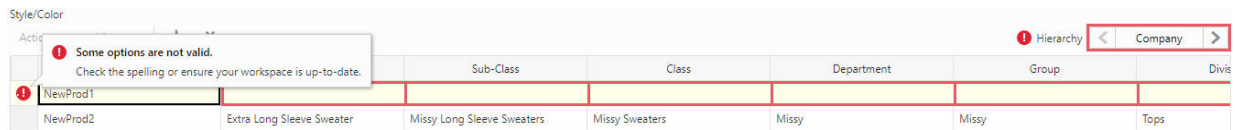
You can select an .xlsx file to upload. The fields can be displayed for the Hierarchy, level 1, level 1 value, level 2, level 2 Value, level 3, Level 3 value, Attribute, Attribute 1 value, and so on. Depending on the hierarchy, the file is validated for the rows to select levels and attributes accordingly. You can only create the new levels for which DPM is enabled.

Validations in Add/Modify Product Dialog Box

You can know when there are errors with the placeholder positions you are trying to import, add, modify or delete. You can see an error icon at the row header for any validation errors on the product hierarchy or attributes associated to the placeholder item. The fields that have errors are highlighted by red boundaries. Upon hovering the

error icon, a tool tip with the following message will be shown, *Some options are not valid. Check the spelling or ensure your workspace is up-to-date.*

Figure 13–20 Validation Errors



If the attribute values entered are not valid, the following message is shown, *Some of the Attribute values entered are not valid. Please select a valid attribute value or remove the invalid value.*

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 RPAS CE 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 RPAS CE User Interface only.

Alert Definition

Real time alerts are configured in workspace 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.

Note: If you define two or more alerts with the same alert measure and target measure, you will only be able to see the alert formatting for one of them.

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.

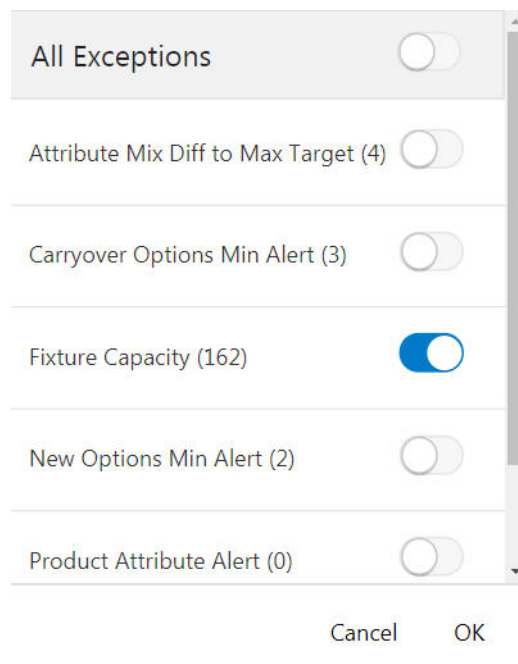
Working with Real Time Alerts

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

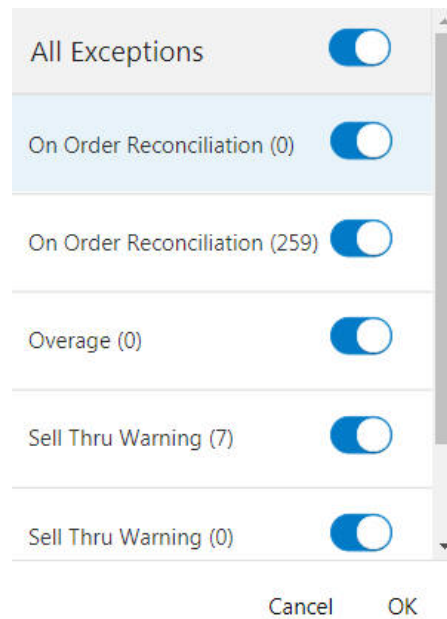
The toolbar contains an exception list that shows all the available alerts. Users can choose either all exceptions or the exceptions that are priority for resolution. The number beside the icon shows the number of hits for the currently active real time alert for the entire workbook.

Figure 14–1 Quick Access Toolbar Alerts



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

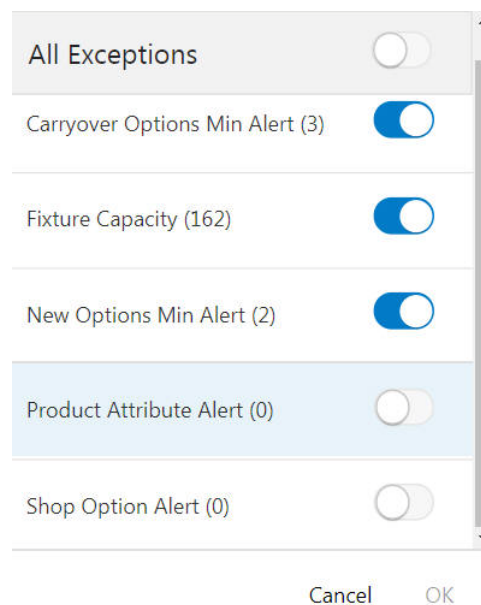
Figure 14–2 Select All Exceptions for Alerts



You can select the exceptions to be displayed using the sliders. You can display multiple exceptions or all exceptions. Note that the active alert is highlighted in blue. In [Figure 14–3](#), the active alert is Product Attribute Alert. You must select the active alert for display before you can click OK.

When you select alerts for display, the alert formatting will be shown in the cells and you can navigate the active alert using the navigation arrows.

Figure 14–3 Select Multiple Exceptions for Alerts



Click on the information icon to launch the alert summary of the currently selected alert. It displays the alerted measure, intersection, alerted condition, and format that was chosen to highlight the alerted cells. This summary also contains the configured condition message for each condition in the alert.

Figure 14–4 Alert Summary

The screenshot shows the 'Alert Summary' dialog box for the alert 'Fixture Capacity (165)'. The dialog is divided into several sections:

- Measure:** Below/Above # of Options
- Intersection:** Assortment Period Sub-Class Store Cluster
- Condition:** # of options does not satisfy min and max fixture capacity.
- Format:** 1234.56

On the left side of the dialog, there is a table with two columns: 'inservative / Humid' and 'A / Conservative / Very Cold'. The table has three rows, with the second row highlighted in yellow.

inservative / Humid	A / Conservative / Very Cold
0	
4	
0	

Alert Navigation

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

Figure 14–5 Enter Alert Navigation Mode

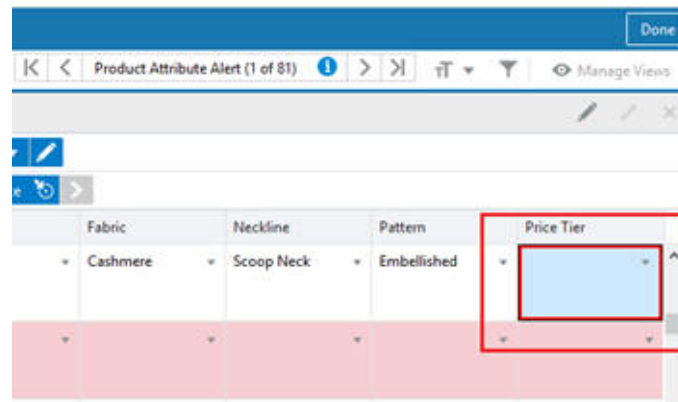


You can see that now you are in alert navigation mode, as highlighted in [Figure 14–7](#). The alerted cell is highlighted in red, and the selected cell is highlighted in black.

Figure 14–6 Alert Navigation Mode

The screenshot shows the 'Review Space Capacity & Constraints' dialog in alert navigation mode. The dialog displays a table of product capacity and constraints for 'Winter 2020'. The table has columns for different product categories and rows for specific products. The cell for 'Missy Cardigan Sweaters' under the 'A / Conservative / Cold' category is highlighted in red, indicating it is the alerted cell. The cell for 'Missy Cardigan Sweaters' under the 'A / Conservative / Marine' category is highlighted in black, indicating it is the selected cell.

	A / Conservative / Cold	A / Conservative / Marine	A / Conservative / Mixed Humid	A / Conservative / Very Cold	A / FashionForward / Very Cold	A / Mainstream / Cold	A / Mi / Marine
Missy 3/4 Sleeve	0	0	0	0	0	0	0
Missy Cardigan Sweaters	20	5	5	5	5	5	5
Missy Cold Shoulder	0	0	0	0	0	0	0

Figure 14-7 Altered Intersections

When you start alert navigation, some of the alerted cells may be hidden from the view. When this happens, you will see a message indicating how many of the total count are visible; you can only navigate through those that are visible. This can occur when positions of the alerted cells are hidden (probably most common), or if the alert's Target Measure is hidden. Use Edit View to make these visible.

This can also happen when the alert intersection is not visible, but starting navigation will make those levels visible. [Figure 14-8](#) shows the message that appears. In this case, February 2005's weeks, which contains two hits, are hidden.

Figure 14-8 Hidden Alerts

Forecast Alert (Alert Navigation Mode) 3 of 5 alert hits are visible

Menu Forecast Alert (1 of 3) Manage Views

Alert Sheet 1

Measure (Default) All Dimensions Product Location

10000010 Leather Loafer - Black 6 B

	FcstQty	FcstLen	LoBd	UpBd	Cost	Price	GM
3/12/2005	1987.00	0	0.00	1000.00	0.00	0.00	
3/19/2005	234.00	0	0.00	1000.00	0.00	0.00	
3/26/2005	833.00	0	0.00	1000.00	0.00	0.00	
4/2/2005	3765.00	0	0.00	1000.00	0.00	0.00	
4/9/2005	1954.00	0	0.00	1000.00	0.00	0.00	
4/16/2005	422.00	0	0.00	1000.00	0.00	0.00	
4/23/2005	654.00	0	0.00	1000.00	0.00	0.00	
4/30/2005	246.00	0	0.00	1000.00	0.00	0.00	
5/7/2005	976.00	0	0.00	1000.00	0.00	0.00	
5/14/2005	611.00	0	0.00	1000.00	0.00	0.00	

Figure 14–9 View Alert Intersections

Measure (Default)	Intersection	Condition	Format
	Assortment Period Sub-Class Store Cluster	# of options does not satisfy min and max fixture capacity.	1234.56

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

Figure 14–10 Resolving Alerts

Neckline	Pattern	Price Tier
Scoop Neck	Embellished	Best
		Best
		Better
Straight Neck	Solid	Good

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

Figure 14–11 Moving Between Alerts During Resolution

Active Status	Brand	Collar	Color
Non-Active	Dylan Rose	Shawl	Man

In alert navigation mode, you see the view or views that are configured for the alert. You cannot change which views are used, but you can edit what is shown in each view using **Edit View**.

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

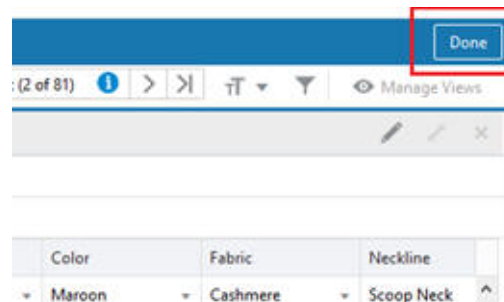
The system remembers the expand – collapse state for any navigation when the user revisits the same alert navigation. When a user exits the alert navigation and later returns, the alert navigation cursor maintains its previous state, this helps users to start alert navigation where they left off.

You can exit the alert navigation mode by clicking **Done**. To hide the alerts, deselect the Alert in the Exception list. When you re-enter the alert navigation mode, you are taken to the same alerted position that you exited from.

An alert is configured to go to a specific step or tab in the taskflow. After you exit Alert Navigation mode, you will be left in that specific step or tab, but it will be restored to its previous layout (View Layout and which views appear in what position). The initial default layout for the step or tab is Full View, using the first configured view in the step or tab.

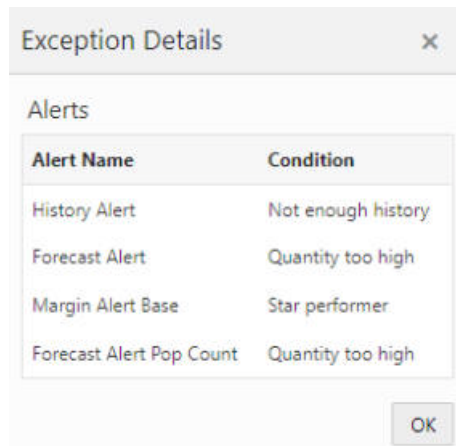
Note: To maintain the last or previous state of alert navigation, always remember to exit the alert navigation mode. If the session times out, the alert navigation will not maintain its previous state.

Figure 14–12 Exit Alert Navigation Mode



Exception Details

Cells with alert hits display the formatting of the highest priority alert on the cell that is enabled for display. You can right-click on the cell and select Exception Details in the context menu for a single cell selection. This brings up the Exception Details pop-up dialog box, shown in [Figure 14–13](#), which lists each alert hit on the cell in priority order, via the configured Alert Label and Condition Message of the hit. Only the alerts selected for display (the slide toggle in the alert selector) are included in this list. The condition name is displayed as a number for rollup cells.

Figure 14–13 Example Exception Details Context Menu

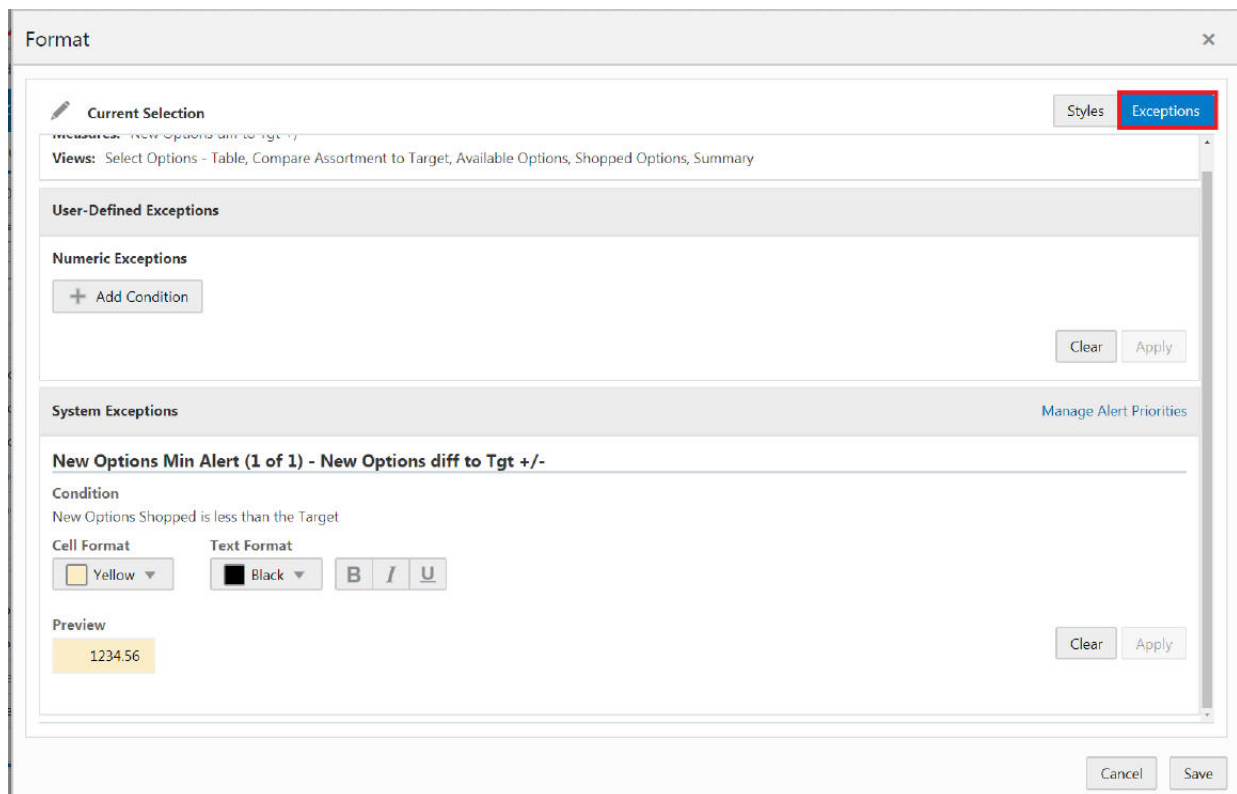
Note that if a rollup alert is configured, you will see a badge in rollup cells that displays the count of how many cells at the alert intersection have that alert. [Figure 14–14](#) shows a rollup badge with alerts at Week rolling up to a count on Month.

Figure 14–14 Rollup Badge

	FcstQty
▲ Feb, FY2005	5955.00 2
2/12/2005	846.00
2/19/2005	2487.00
2/26/2005	1753.00
3/5/2005	869.00

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 RPAS CE 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 14–15 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




Figure 15–1 Position Filtering in a Single View

The figure illustrates the process of position filtering in a single view. It shows two screenshots of the 'Create Options' window, connected by a large blue arrow labeled 'Filter'.

Top Screenshot: Create Options

The top screenshot shows the 'Create Options' window with the following columns: Retail Price, Cost, IMU %, Select Size Range, and Export Placeholder to RMS. The data is organized into sections, with 'Missy Cardigan Sweaters' and 'Missy Cold Shoulder Sweaters' highlighted in blue.

	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	41.08	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 Sweater0000004	0.00	0.00	0.0%	▼	<input type="checkbox"/>
Missy Cold Shoulder Sweaters	83.33	35.33	57.6%	▼	<input type="checkbox"/>
67150909 - Cold Shoulder Cable Knit Sweater - Pearl	100.00	45.01	55.0%	▼	<input type="checkbox"/>
56453038 - Cold Shoulder Zip Sweater - Moss	75.00	30.49	59.3%	▼	<input type="checkbox"/>
56659560 - Cold Shoulder Zip Sweater - Black	75.00	30.49	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"/>

Bottom Screenshot: Create Options (Filtered)

The bottom screenshot shows the 'Create Options (Filtered)' window, which displays the same data as the top screenshot, but with the 'Missy Cardigan Sweaters' section highlighted in yellow, indicating it is the selected filter.

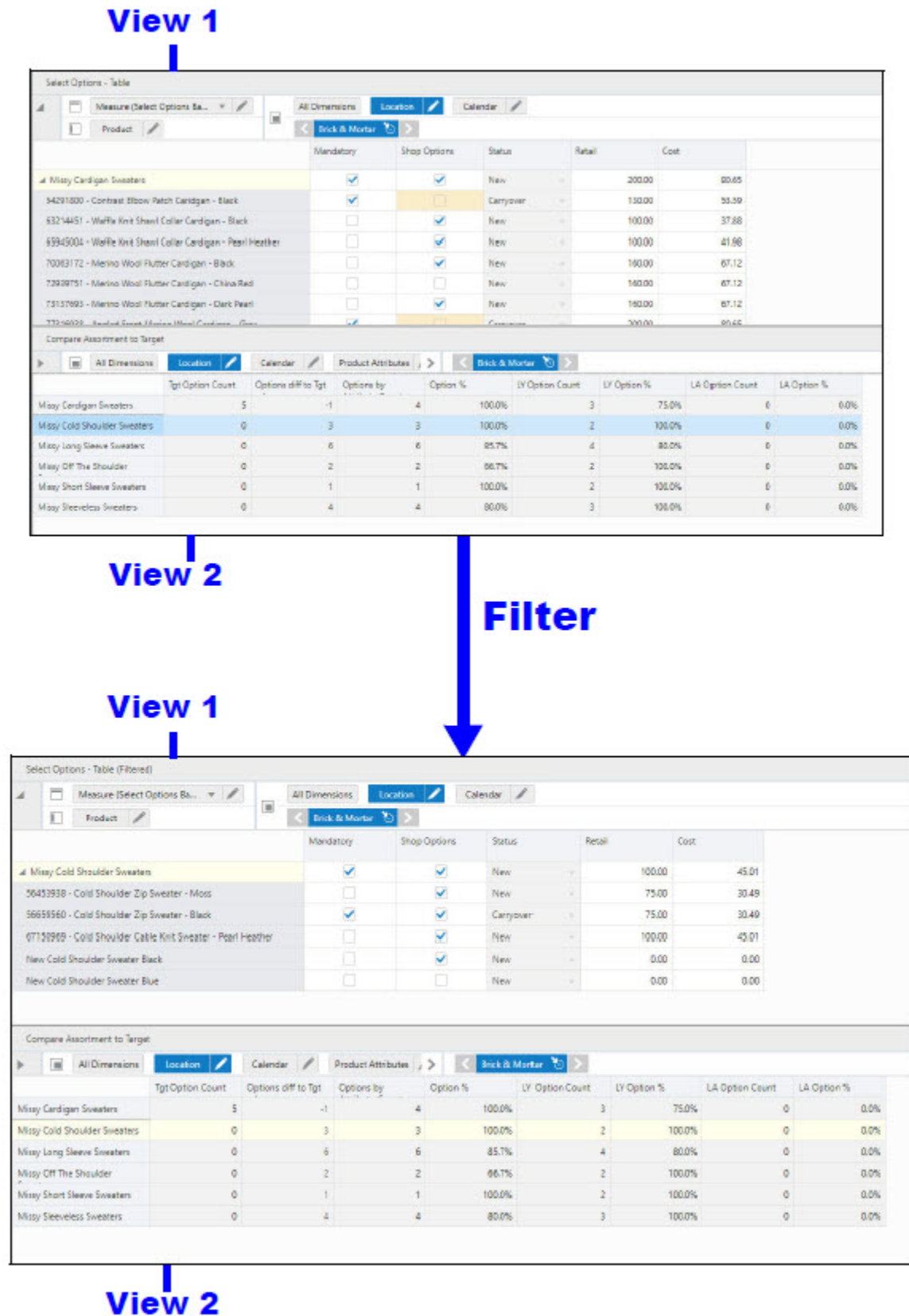
	Retail Price	Cost	IMU %	Select Size Range	Export Placeholder to RMS
Missy Cardigan Sweaters	148.89	61.08	59.0%	▼	<input type="checkbox"/>
54291800 - Contrast Elbow Patch Cardigan - Black	130.00	53.59	58.8%	▼	<input type="checkbox"/>
63214451 - Waffle Knit Shawl Collar Cardigan - Black	100.00	37.88	62.1%	▼	<input type="checkbox"/>
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl	100.00	41.08	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 Sweater0000004	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(s) or column(s) or a specified set of cells. Note that the position filter cannot be applied to the Measure dimension; as a result, the Apply Position Filter context menu is not available for measures.

Selecting from Row or Column

Position filtering can also be initiated by selecting rows or columns. 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

The screenshot shows a Tableau dashboard titled 'Create Assortment 2020'. At the top, there's a 'Determine # of Options' button. Below it is a 'Menu' dropdown. The main view is a table with columns: Sales R, Sales U, and Sales AUR. The rows list various sweater types. A right-click context menu is open over the 'Missy Long Sleeve Sweaters' row, showing options like 'Resize Height/Width', 'Format', 'Import Position(s)', 'Apply Position Filter' (which is highlighted), 'Expand', and 'Collapse'.

	Sales R	Sales U	Sales AUR
Missy Cardigan Sweaters	30,110	322	93.51
Missy Cold Shoulder Sweaters	7,835	132	59.36
Missy Long Sleeve	98,164	790	124.26
Missy Long Sleeve Sweaters	38,206	478	79.93
Missy Off The Shoulder		6	42.25
Missy Off The Shoulder Sweaters		145	74.69
Missy Short Sleeve		18	110.50
Missy Sleeveless		360	61.88
Missy Sleeveless Sweaters		1,039	92.98

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

Dashboard Create Assortment 2020 X

Determine # of Options Determine # of Options

Menu

Determine # of Options

Measure (unsaved) All Dimensions Location Calendar

Product A / Conservative / Cold

	Sales R	Sales U	Sales AUR	GM R
Missy Cardigan Sweaters	30,110	322	93.51	
Missy Cold Shoulder Sweaters	7,835	132	59.36	
Missy Long Sleeve	98,164	790	124.26	
Missy Long Sleeve Sweaters	38,206	478	79.93	
Missy Off The Shoulder	254	6		
Missy Off The Shoulder Sweaters	10,831	145		
Missy Short Sleeve	1,989	18		
Missy Sleeveless	22,277	360		
Missy Sleeveless Sweaters	96,602	1,039		

Format

Lock Cells

Unlock Cells

Unlock All Cells

Fill

Apply Position 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

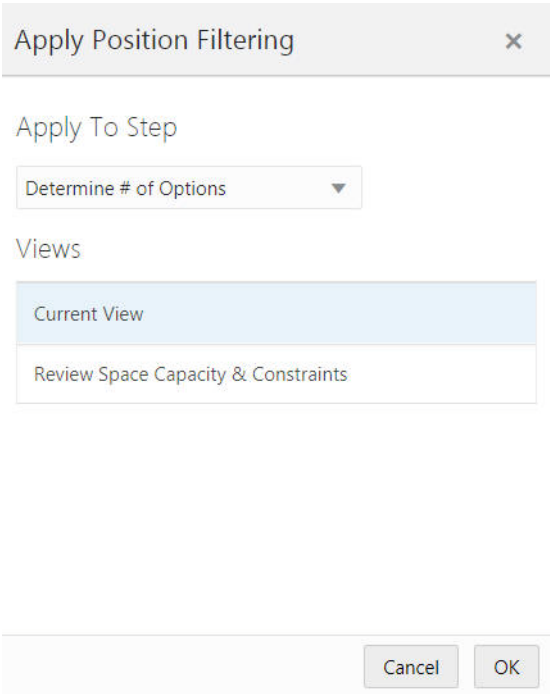
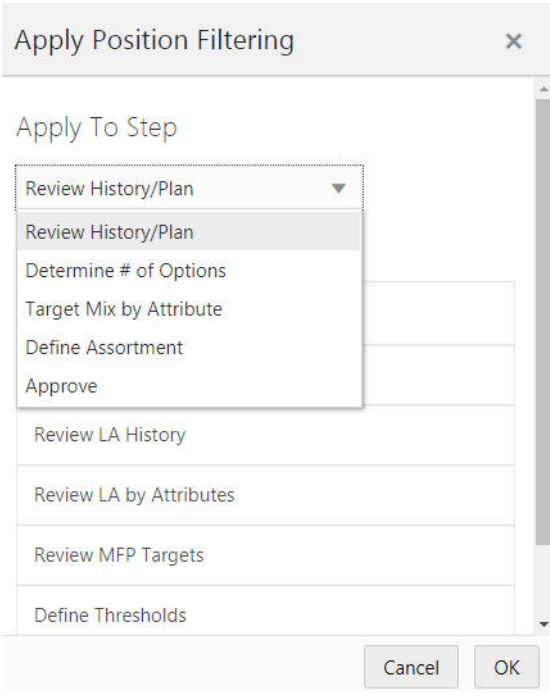
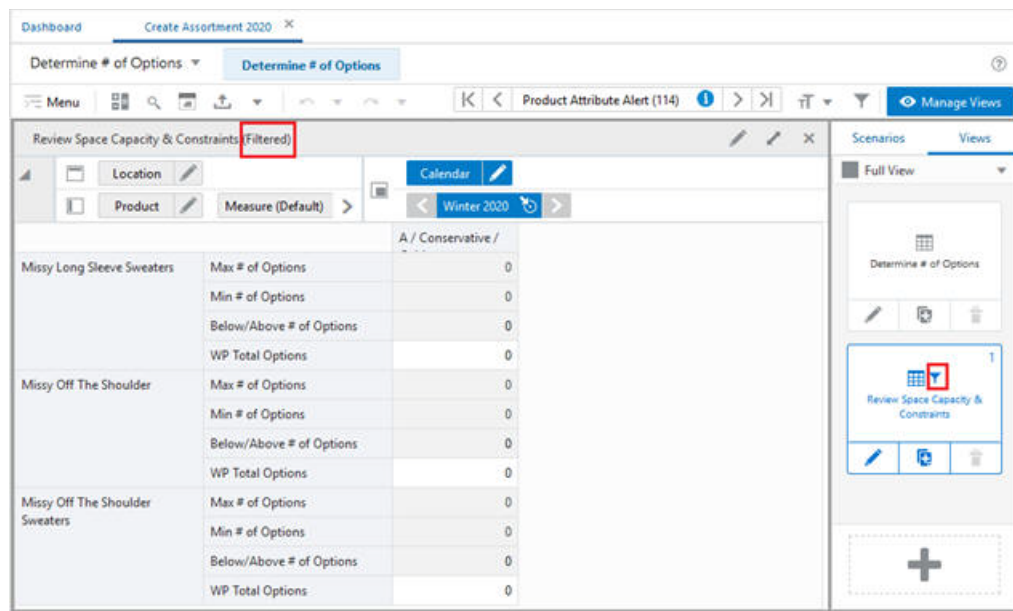


Figure 15–6 Applying Position Filter on a View in Different Step

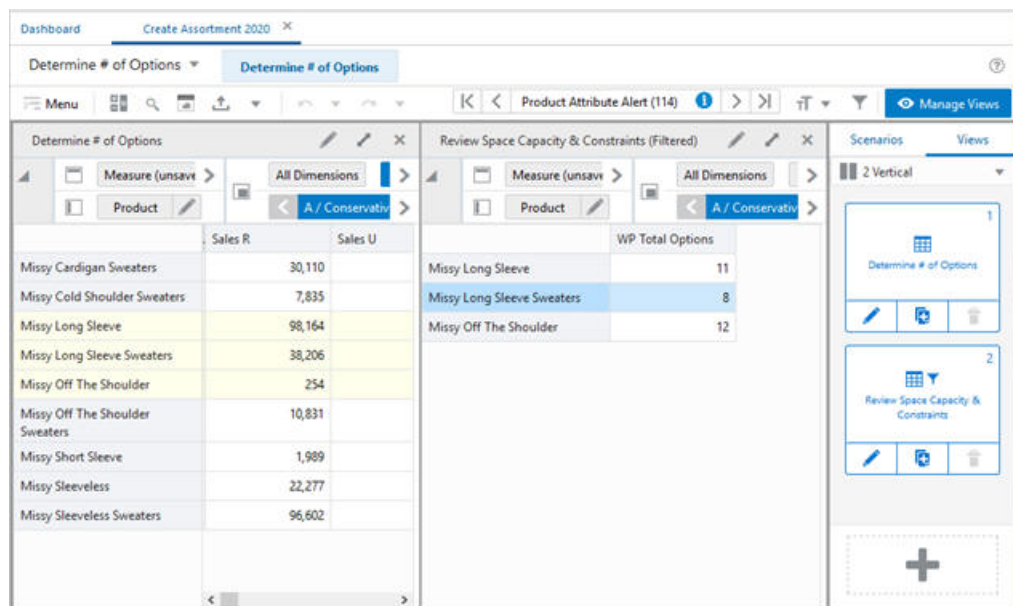


After the filter is applied, you will receive a snack bar notification. The view title will be appended with (Filtered) text and a funnel (filter) icon will be shown in the view tile in Manage Views, as shown in [Figure 15–7](#).

Figure 15–7 Position Filtering Icon and Filtered View

Tiling Views

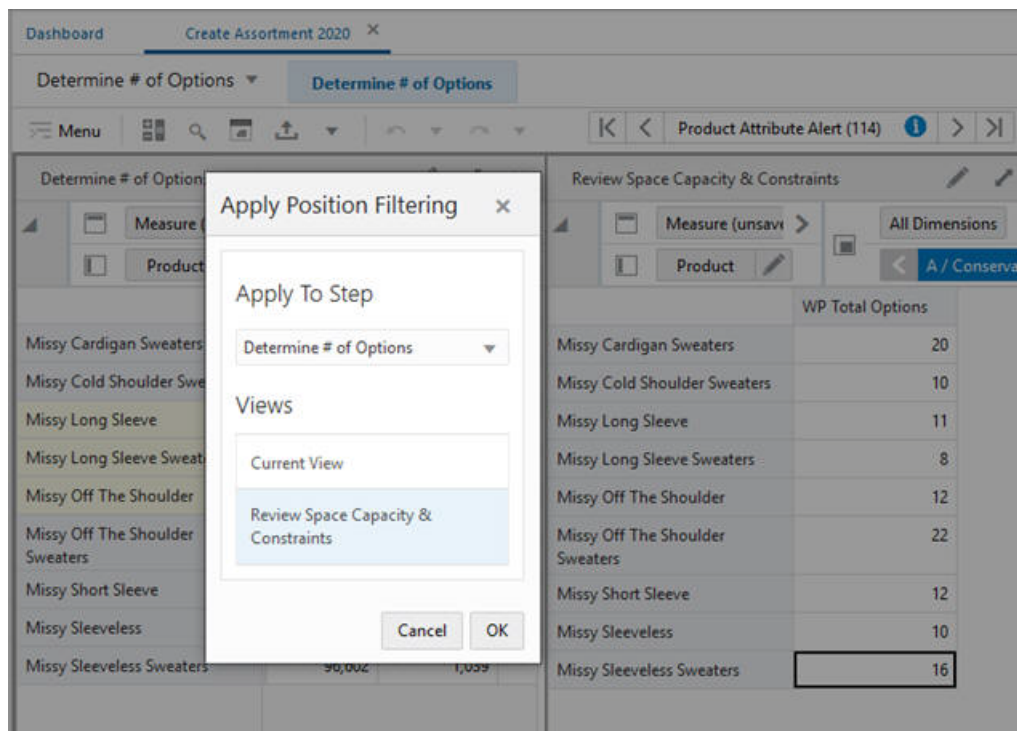
One way of working with position filters is to tile the views. This can be done from the Manage Views menu on the Quick Access Toolbar. In this way, two or more views can be shown simultaneously. The filter can then be applied to one of the views, leaving the filtered data displayed in another view,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

Figure 15–8 Tiling Views

Applying Position Filters Example

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 Position Filtering: Stage 1 Example



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 Position Filtering: Stage 2 Example

The screenshot shows the Oracle Retail Predictive Application interface. The left pane, titled 'Determine # of Options', contains a table with columns 'Sales R', 'Sales U', and 'Sale'. The right pane, titled 'Review Space Capacity & Constraints (Filtered)', contains a table with columns 'Product' and 'WP Total Options'. Both panes show data for various Missy brand items, with the right pane filtered to show only the items selected in the left pane.

	Sales R	Sales U	Sale
Missy Cardigan Sweaters	30,110	322	
Missy Cold Shoulder Sweaters	7,835	132	
Missy Long Sleeve	98,164	790	
Missy Long Sleeve Sweaters	38,206	478	
Missy Off The Shoulder	254	6	
Missy Off The Shoulder Sweaters	10,831	145	
Missy Short Sleeve	1,989	18	
Missy Sleeveless	22,277	360	
Missy Sleeveless Sweaters	96,602	1,039	

Product	WP Total Options
Missy Long Sleeve	11
Missy Long Sleeve Sweaters	8
Missy Off The Shoulder	12

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.

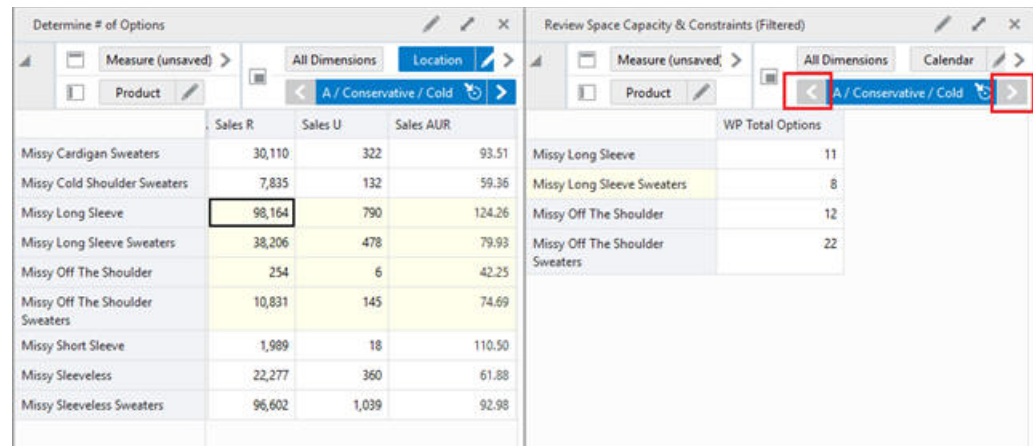
In the example shown in [Figure 15–9](#) and [Figure 15–10](#), the position filter has been used in the left hand view to select a subset of items from the total range available. The right hand view now only contains data restricted to this items.

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

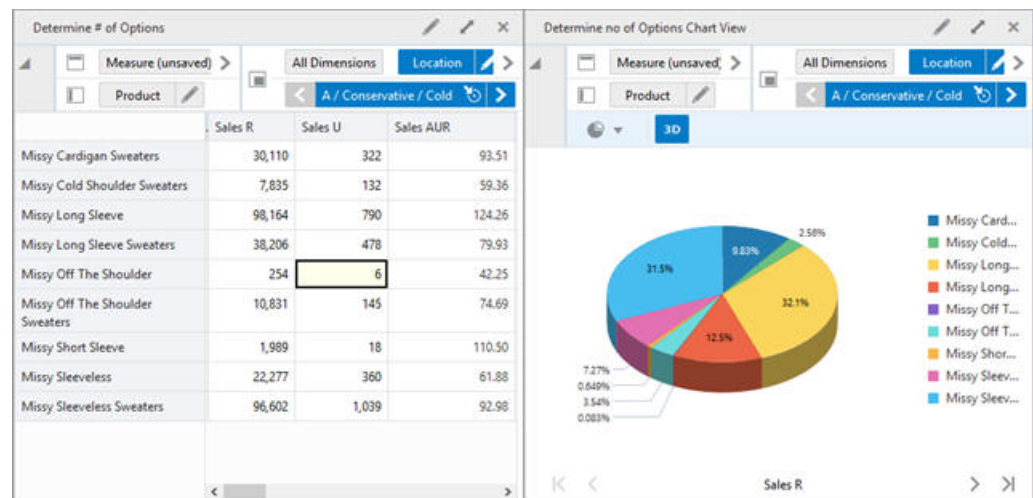
When a position filter is applied, the information in the page edge is also filtered. If the Synchronize Page Edge option has been selected, synchronized page edge navigation may not always be possible if a position filter has been applied.

Figure 15–11 Position Filtering: Page Edge Synchronization

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).

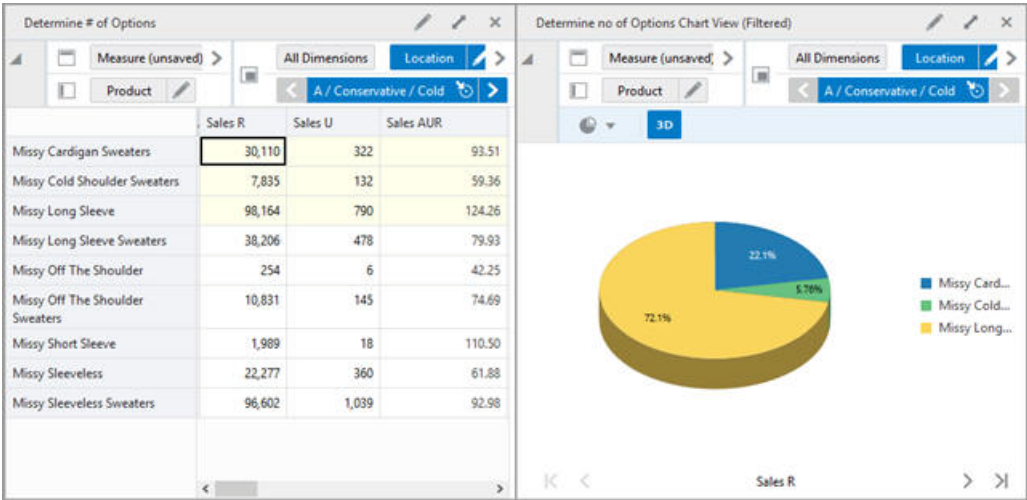
Position Filtering and Charts

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



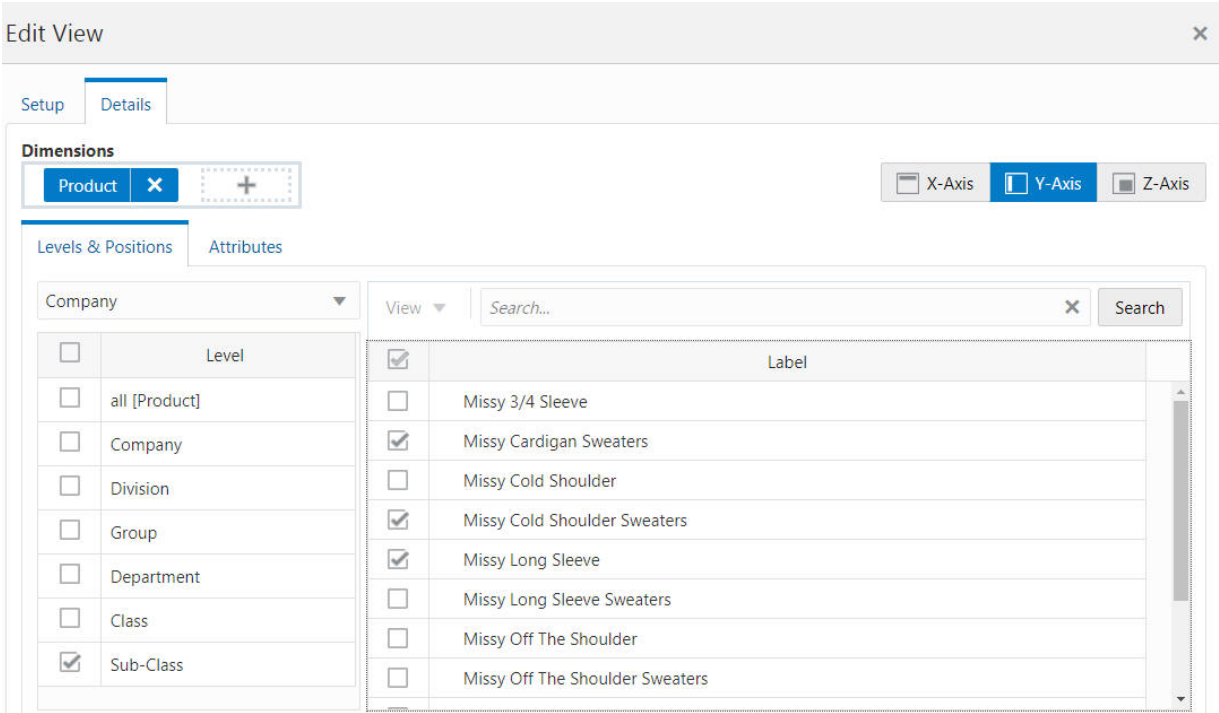
Factors Affecting the Use of Position Filters

Other RPAS CE 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. If a position filter is applied, then you will not see the *Filtered* text appended with the title of the View in Alert Navigation mode.

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

	A / Conservative / Cold	A / Conservative / Marine	A / Conservative / Mixed Humid	A / Conservative / Very Cold	A / FashionForward / Very Cold	A / Mainstream / Cold	A / Mainstream / Marine
Missy 3/4 Sleeve	0	0	0	0	0	0	0
Missy Cardigan Sweaters	20	5	5	5	5	5	5
Missy Cold Shoulder	0	0	0	0	0	0	0
Missy Cold Shoulder Sweaters	10	4	4	4	3	4	4
Missy Long Sleeve	11	0	0	0	0	0	0
Missy Long Sleeve Sweaters	8	8	7	7	7	8	8
Missy Off The Shoulder	12	0	0	0	0	0	0
Missy Off The Shoulder Sweaters	22	3	3	3	3	3	3
Missy Short Sleeve	12	0	0	0	0	0	0
Missy Short Sleeve Sweaters	0	2	2	2	3	3	3
Missy Sweatshirt	10	0	0	0	0	0	0

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

	A / Conservative / Cold	A / Conservative / Marine	A / Conservative / Mixed Humid	A / Conservative / Very Cold	A / FashionForward / Very Cold	A / Mainstream / Cold	A / Mainstream / Marine
Missy Cold Shoulder	0	0	0	0	0	0	0
Missy Cold Shoulder Sweaters	10	4	4	4	3	4	4
Missy Long Sleeve	11	0	0	0	0	0	0
Missy Long Sleeve Sweaters	8	8	7	7	7	8	8
Missy Off The Shoulder	12	0	0	0	0	0	0

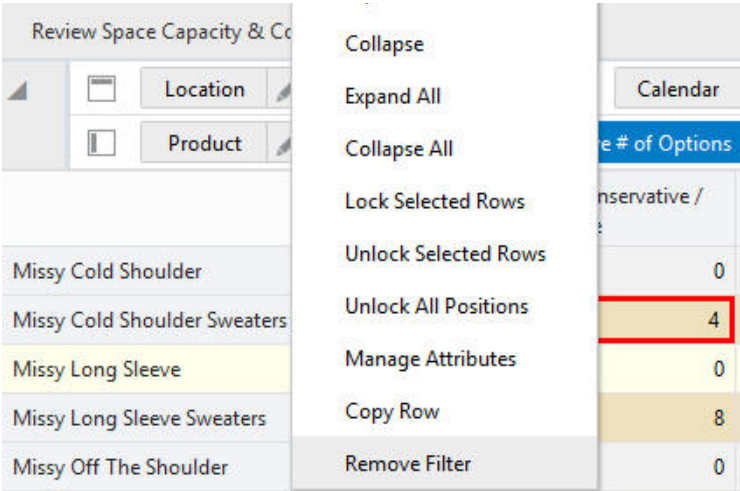
Position Filtering in Visual Planning

Apply the position filter to the Container view using one of the Pivot table type views in a Visual Planning supported workspace. The applied position filter can be removed by clicking the **Remove Filter** button available in the Dimension Filters bar.

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 / Conservative / Cold	A / Conservative / Marine	A / Conservative / Mixed Humid	A / Conservative / Very Cold	A / FashionForward / Very Cold
Missy Cold Shoulder	0	0	0	0	0
Missy Cold Shoulder Sweaters	10	4	4	4	3
Missy Long Sleeve	11	0	0	0	0
Missy Long Sleeve Sweaters	8	8	7	7	7
Missy Off The Shoulder	12	0	0	0	0

Figure 15–19 Worksheet State After Reopening the Workbook

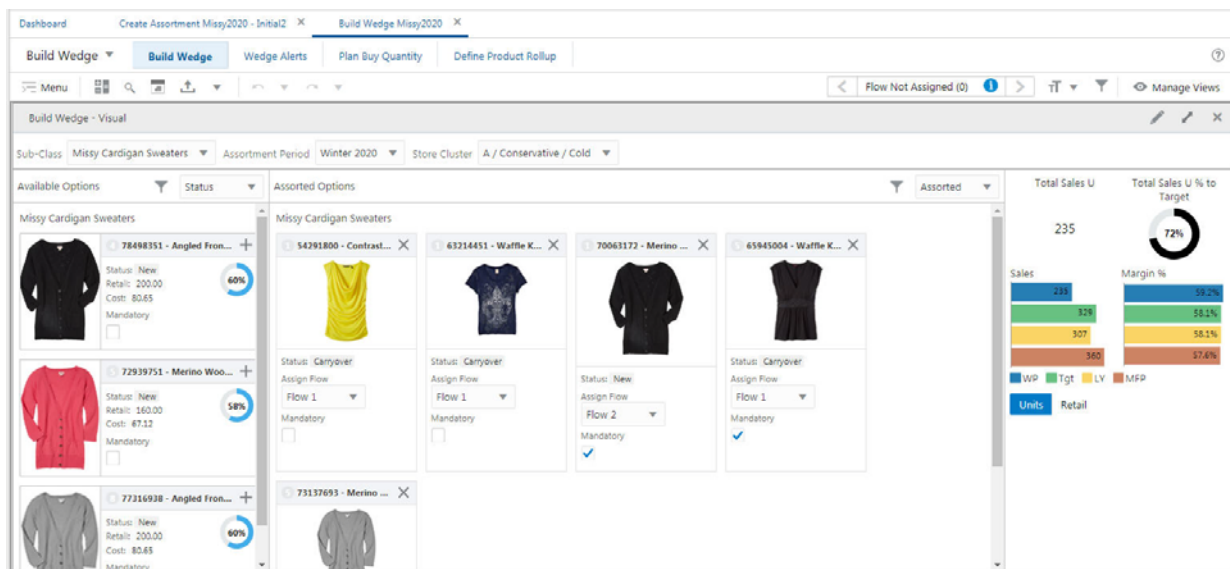
	A / Conservative / Cold	A / Conservative / Marine	A / Conservative / Mixed Humid	A / Conservative / Very Cold	A / FashionForward / Very Cold
Missy Cold Shoulder	0	0	0	0	0
Missy Cold Shoulder Sweaters	10	4	4	4	3
Missy Long Sleeve	11	0	0	0	0
Missy Long Sleeve Sweaters	8	8	7	7	7
Missy Off The Shoulder	12	0	0	0	0

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 and Shopped/ Assorted Styles view. It is a specific type of view (Aggregate view layout) that supports visual planning using the Cards Add and Remove functionality shown in [Figure 16-1](#).

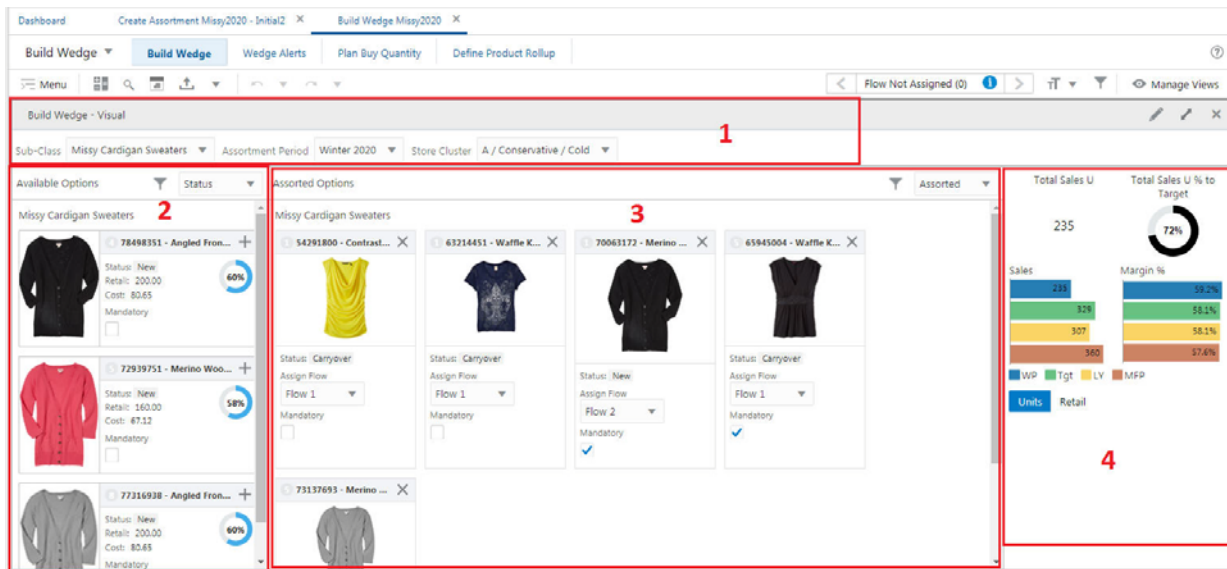
Figure 16-1 Cards Add and Remove



The user can use Cards Add and Remove to add and remove one or more cards and add them from Available Options sub-view to the Shopped/ Assorted Options sub-view. The Available Styles and Shopped/ Assorted Styles views are side by side with some of the key measures configured from the application.

The Available and Shopped/ 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 and 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.

Figure 16-3 Available Options

Available Options		Status
Missy Cardigan Sweaters		
	<div>78498351 - Angled Fr... +</div> <div>Status: New</div> <div>Retail: 200.00</div> <div>Cost: 80.65</div> <div>Mandatory <input type="checkbox"/></div>	<div>60%</div>
	<div>72939751 - Merino ... +</div> <div>Status: New</div> <div>Retail: 160.00</div> <div>Cost: 67.12</div> <div>Mandatory <input type="checkbox"/></div>	<div>58%</div>
	<div>77316938 - Angled Fr... +</div> <div>Status: New</div> <div>Retail: 200.00</div> <div>Cost: 80.65</div> <div>Mandatory <input type="checkbox"/></div>	<div>60%</div>

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.




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.

Figure 16–4 Assorted Options

Assorted Options

Missy Cardigan Sweaters

54291800 - Contrast... X	63214451 - Waffle K... X	70063172 - Merino ... X
		
Status: Carryover	Status: Carryover	Status: New
Assign Flow Flow 1 ▼	Assign Flow Flow 1 ▼	Assign Flow Flow 2 ▼
Mandatory <input type="checkbox"/>	Mandatory <input type="checkbox"/>	Mandatory <input checked="" type="checkbox"/>

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.

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.

You can undo and redo the add/delete cards operation using the Undo-Redo functionality.

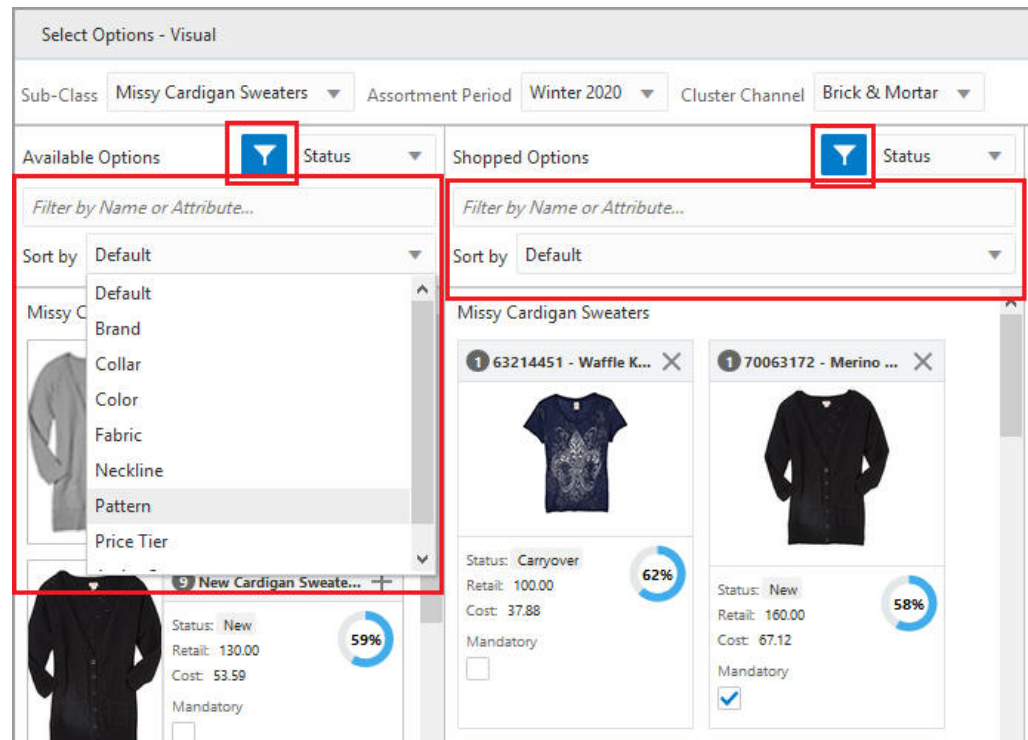
Section 4

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.

Filtering and Sorting Cards by Attribute

This section describes filtering and sorting cards.

Figure 16–5 Enable Filter Option: Filter and Sort Tiles**Filtering by Attribute**

You can filter cards by attribute in order to pay more attention to the products with important attribute values in your assortment. As a buyer, you can view your plan data for a particular attribute value and make sure the plan reflects your requirements. You can filter both Available and Shopped/ Assorted options.

Figure 16–6 Filter Cards by Attribute

Click the **Filter** icon in the Available or Shopped/ Assorted options section. Click the **Filter by Name or Attribute** text field, type in an attribute value, and click **Enter**. Alternatively, you can select from the auto-suggest in list. The filter is applied, and all the cards with attribute values or labels that contain the entered text are displayed. Click **Cross (X)** to clear the filter.

If no matching data is found, you see the following message: *Applied Filter is hiding all items. No items to display.*

Note: If a PQD or other attribute filter has been defined in the top filter bar, then that will be applied first before the attribute value entered into the filter field.

Sorting by Attribute

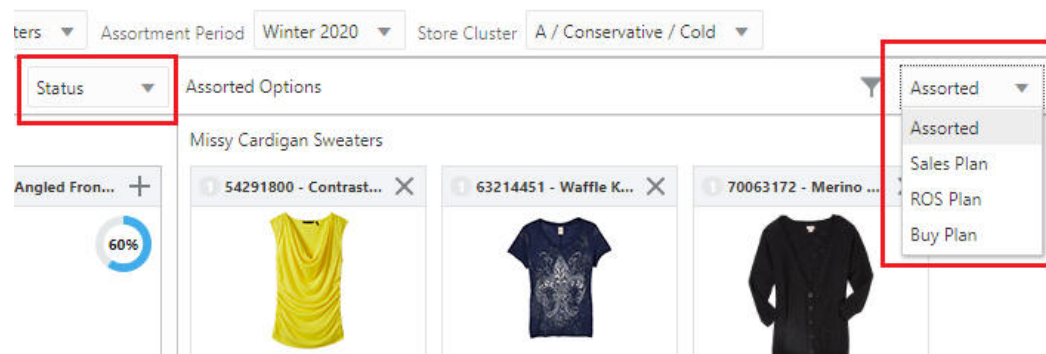
You can sort the cards by attribute in the container view to organize your available options as well as see the makeup of your assortment for each style/subclass for different attribute values.

Click the **Filter** icon in Available or Shopped/ Assorted options section. Select the attribute from the Sort by list. The cards are sorted, based on the selected attribute.

Selecting Card Definitions

You can select from different card definitions to help you make better decisions while selecting options in the planning process. You can select card definitions that contain different measures or attributes.

Figure 16–7 Select Card Definition

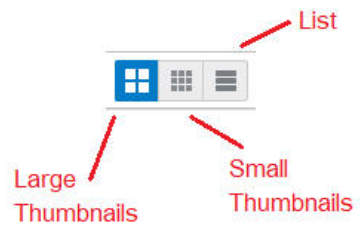


The app configurer can define more card definitions for a Card View, so that more attributes and measures are visible to the end user in a structured way. For details about defining card definitions, see the *Oracle Retail Predictive Application Server Cloud Edition Configuration Tools User Guide*.

Each card definition can specify an attribute, up to three read-only measures, up to two editable measures, as well as an optional gauge measure and an optional badge measure.

You can switch between these card definitions by selecting the required card definition from the list next to the Filter icon in Available or Shopped/ Assorted options sections. If only one card definition is available, the list will not be visible.

If more than one size (small, large, list) of card is available for the selected card definition, you will see icons that let you choose the size of cards. Typically, only list is used for the available options and only small and large thumbnails for the shopped and assorted options.

Figure 16–8 Card Sizes

Special Features

This chapter describes special RPAS CE 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, RPAS CE 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

The screenshot displays the Oracle Retail Predictive Application interface. The top navigation bar includes 'Dashboard', 'MerchPlan 2020', and tabs for 'Create Plan', 'Seed Plan', 'Sales/Markdowns', 'Inventory/Receipts', and 'Gross Margin'. The 'Sales/Markdowns' tab is active. Below the navigation bar, there's a 'Menu' section with icons for 'Calendar', 'Measure (1. Sales and Mark...', and 'All Dimensions'. The main data area shows a table with columns for dates (2/29/2020, 3/7/2020, 3/14/2020, 3/21/2020, 3/28/2020) and rows for various metrics like 'Wp Sales R', 'Fcst Sales R', 'Wp Sales R var Fcst %', 'Ly Sales R', 'Wp Sales R var Ly %', 'MP Wp Sales R contrib Prod %', 'MP Ly Sales R contrib Prod %', 'MP Wp Sales R contrib Time %', 'MP Ly Sales R contrib Time %', 'Wp Returns R %', and 'Wp Returns R'. On the right side, a 'Scenarios' panel shows a list of scenarios, with 'Initial' (Created: 4/19/2019) highlighted in a red box. Below the scenarios list is a '+' icon for adding new scenarios. At the bottom, there are buttons for 'Calculate (F9)', 'Seed', 'Refresh Fulfillment', and 'Commit (F8)'.

	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020
Wp Sales R	69,236.49	69,230.05	69,318.22	70,834.28	35,97
Fcst Sales R	69,236.49	69,230.05	69,318.22	70,834.28	35,97
Wp Sales R var Fcst %	0.0%	0.0%	0.0%	0.0%	0
Ly Sales R	69,236.49	69,230.05	69,318.22	70,834.28	35,97
Wp Sales R var Ly %	0.0%	0.0%	0.0%	0.0%	0
MP Wp Sales R contrib Prod %	2.0%	6.4%	7.5%	7.8%	4
MP Ly Sales R contrib Prod %	2.3%	2.8%	2.8%	3.1%	1
MP Wp Sales R contrib Time %	1.6%	1.6%	1.7%	1.7%	0
MP Ly Sales R contrib Time %	1.7%	1.7%	1.7%	1.7%	0
Wp Returns R %	39.9%	39.8%	39.9%	39.8%	30
Wp Returns R	27,639.81	27,575.90	27,691.22	28,219.83	12,63

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

This screenshot is similar to Figure 17-1, but it shows the context menu for the 'Initial' scenario in the 'Scenarios' panel. The menu options are: 'Duplicate', 'Rename', 'Delete', 'Open', and 'Open in new tab'. The 'Duplicate' option is highlighted with a red box. The rest of the interface, including the data table and navigation bar, is identical to Figure 17-1.

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.

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

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 17–3 Master Scenario Identification

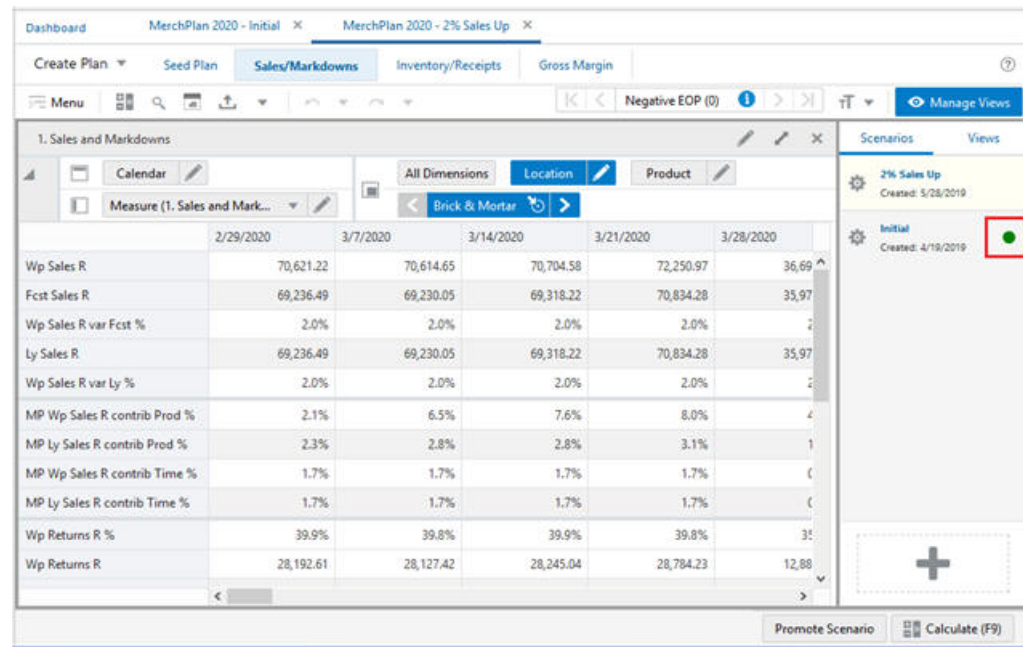
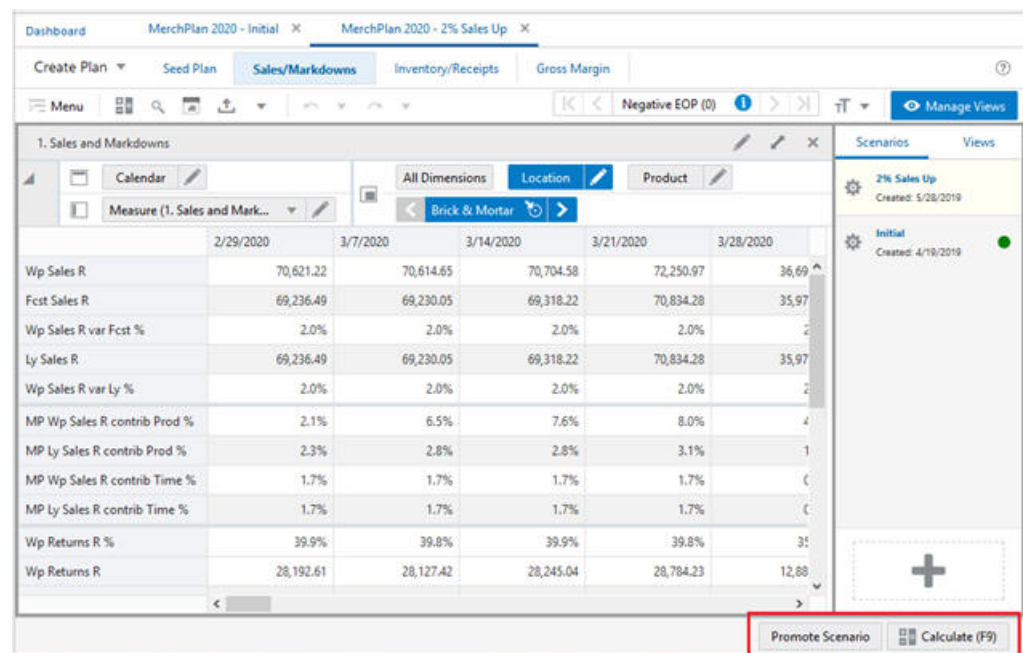
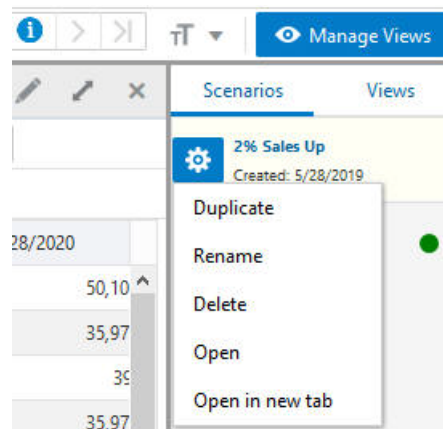


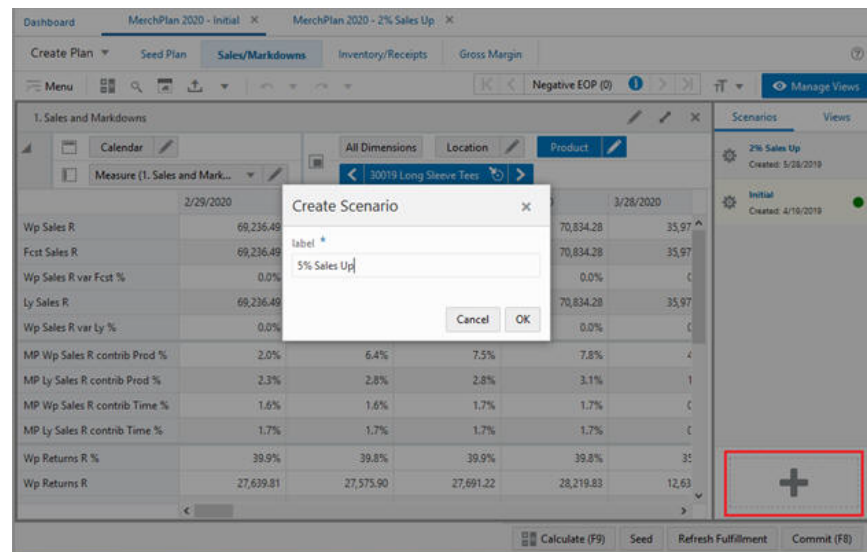
Figure 17–4 What-If Scenario



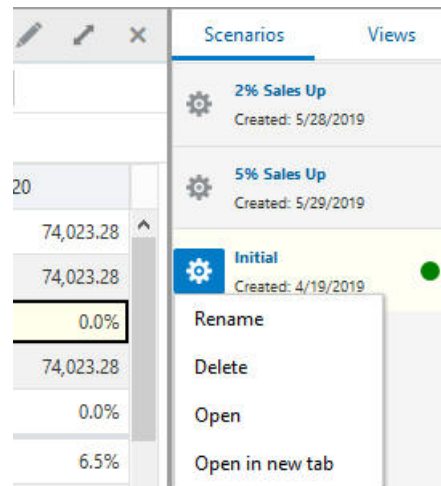
The actions Duplicate (to duplicate the scenario and create new one), Rename (to change the label of the scenario), Delete (to delete the scenario), Open (to open the scenario in the current browser window), and Open in new tab (to open the scenario in new browser tab window) are shown in Figure 17–5.

Figure 17–5 Actions Performed on a Scenario

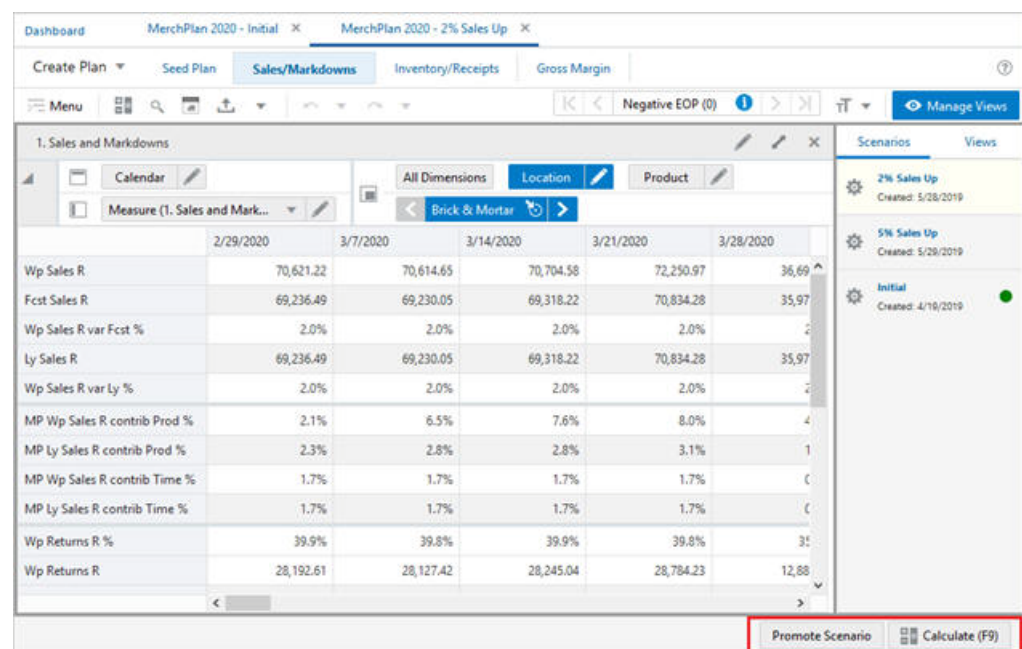
You can also create the scenario by using the + icon in the Scenarios section.

Figure 17–6 Create Scenario

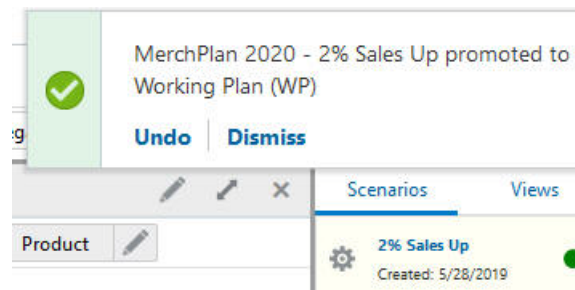
A maximum of three scenarios is allowed, including the master scenario. Once you have created three scenarios and the master scenario, the + icon and the duplicate action are not available and you cannot create more scenarios.

Figure 17-7 Maximum Number of Scenarios

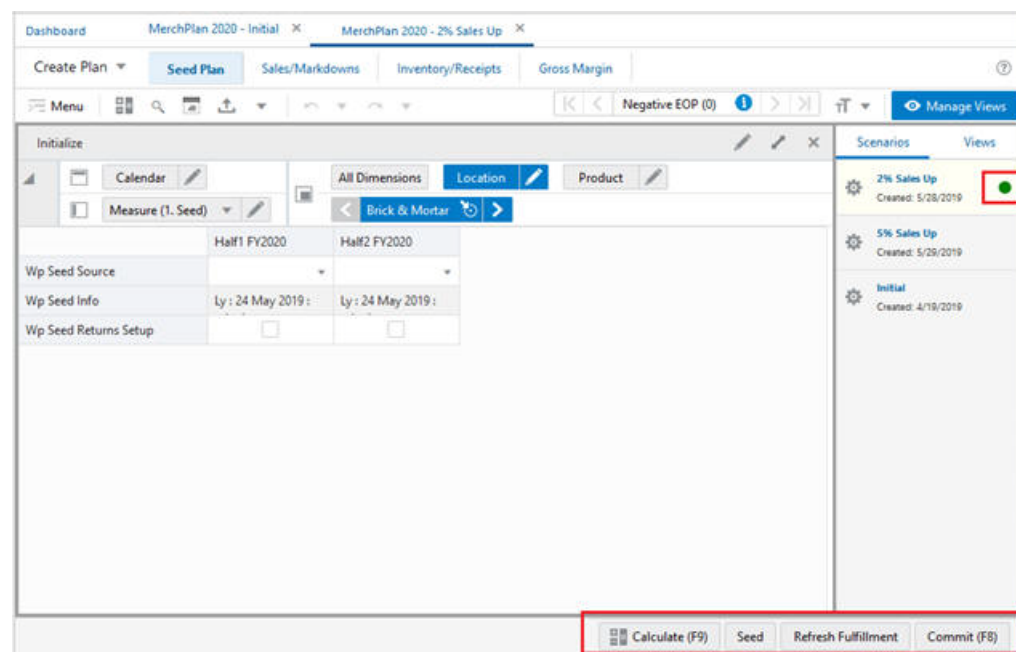
You can delete the scenario in order to create a new scenario. You can promote the scenario to master scenario. In [Figure 17-8](#), the 2% Sales Up scenario is promoted to the master scenario by clicking **Promote Scenario**.

Figure 17-8 Promote Scenario

After you click Promote Scenario, a toast notification is displayed, as shown [Figure 17-9](#). Here you can either dismiss the notification or undo the promote scenario. If you dismiss the notification, the 2% Sales Up scenario is promoted to the master scenario. If you click Undo, the 2% Sales Up scenario is not promoted to the master scenario, and the earlier master scenario continues as master.

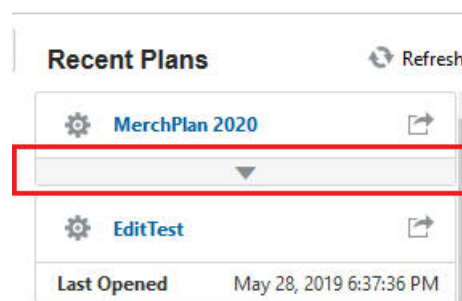
Figure 17–9 Toast Notification During Promote Scenario

The 2% Sales Up scenario is now the master scenario and you can commit the data.

Figure 17–10 What-If Scenario Promoted to Master Scenario

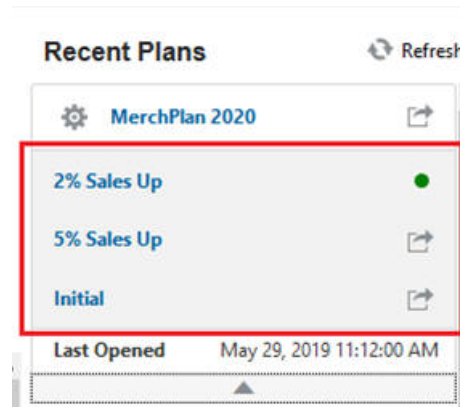
Viewing All Scenarios from the Dashboard

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

Figure 17–11 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 17-12 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 RPAS CE, 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. If there is more than one visible image attribute, all of their primary images (thumbnail-sized version) will be shown in a carousel control. Only one of the images can be seen at any given time. The user can scroll through all the images by clicking the left and right arrow controls that appear on either side of the image.






Figure 17–13 Image Display

		Fcst Sales U	Base Unit Price R
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather		0	100.00
70063172 - Merino Wool Flutter Cardigan - Black		0	160.00
72939751 - Merino Wool Flutter Cardigan - China Red		0	160.00
73137693 - Merino Wool Flutter Cardigan - Dark Pearl		0	160.00
77316938 - Angled Front Merino Wool Cardigan - Grey		0	200.00

You can right click 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.
- **Show Images Separately:** Separates images and attributes into separate cells. Not available if attributes are hidden
- **Show All Attributes Together:** Shows the images and attributes in a single cell.

Figure 17–14 Image Cell Actions

		Sales U	Base Unit Price R
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather		0	100.00
70063172 - Merino Wool Flutter Cardigan - Black		0	160.00
72939751 - Merino Wool Flutter Cardigan - China Red		0	160.00
73137693 - Merino Wool Flutter Cardigan - Dark Pearl		0	160.00
77316938 - Angled Front Merino Wool Cardigan - Grey		0	200.00

Lock Selected Rows

Unlock Selected Rows

Unlock All Positions

Manage Attributes

View/Manage Images






Hide Images

Show Attributes

Managing 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 17–15 *Manage Attributes*

				Base Unit Price R
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather				100.00
70063172 - Merino Wool Flutter Cardigan - Black				160.00
72939751 - Merino Wool Flutter Cardigan - China Red				160.00
73137693 - Merino Wool Flutter Cardigan - Dark Pearl			0	160.00
77316938 - Angled Front Merino Wool Cardigan - Grey			0	200.00

Lock Selected Rows

Unlock Selected Rows

Unlock All Positions

Manage Attributes

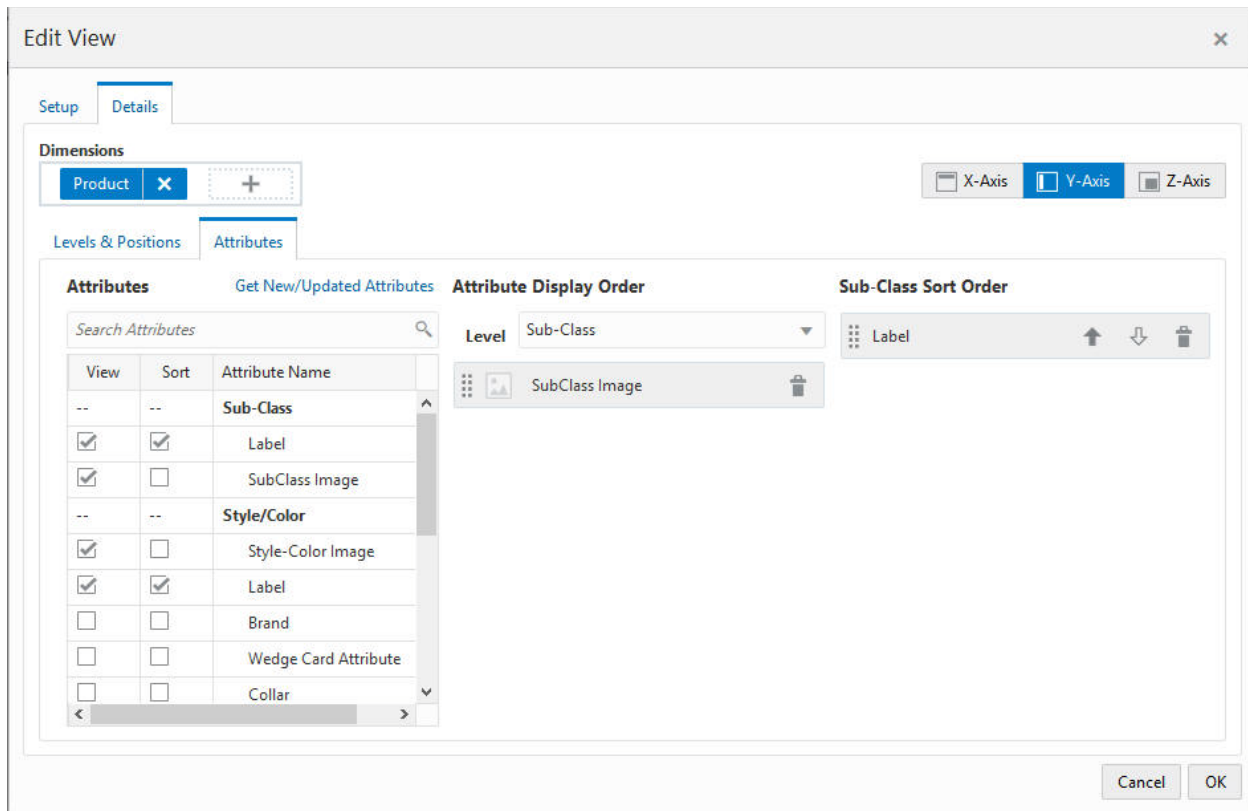
View/Manage Images

Hide Images

Show 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.

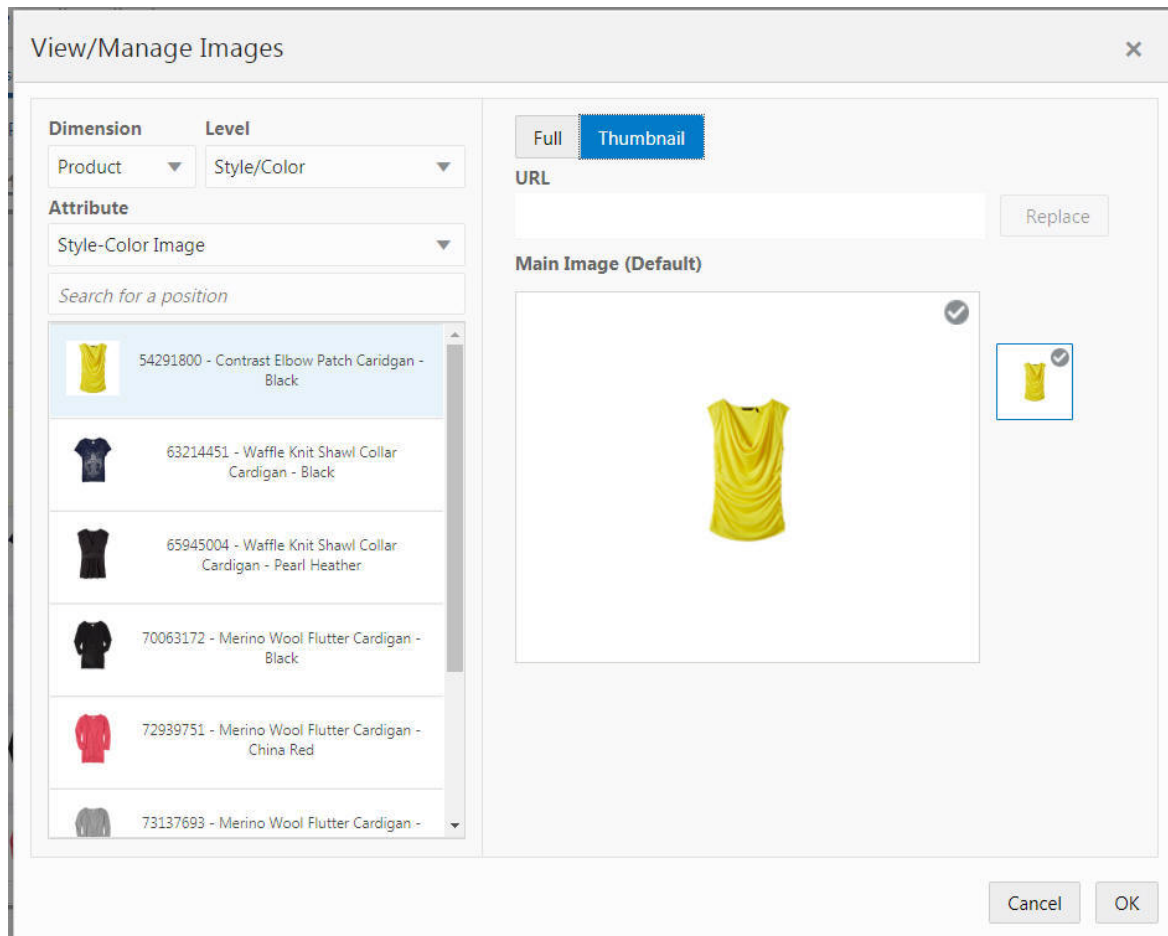
Figure 17–16 Select Attributes for Viewing and Sorting Positions

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.

Viewing and Managing Images

Right click on the images to launch the [View and Manage Images Window](#). 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.

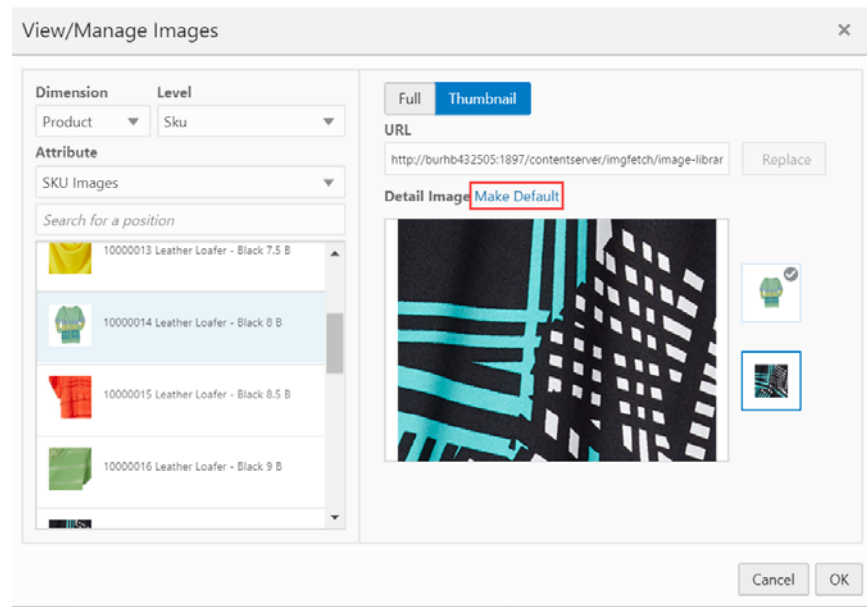
Figure 17–17 View and Manage Images Window



Using the URL Field

The URL text box in the [View and Manage Images Window](#) allows you to:

- Add new thumb and full sized images for dimension positions that do not have any images.
- Replace existing thumb and full sized images associated with dimension positions.
- Designate an existing image as the default image for a position by clicking **Make Default** as shown in [Figure 17–18](#).

Figure 17–18 Make Default Link for an Image

- Validate your inputs by only allowing:
 - URLs that are validated by the hosts
 - Images of valid file types

To save any updates or changes made, click **OK**.




To clear any updates or changes made, click **Cancel**.

Resizing 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




			8/8/2020
54291800 - Contrast Elbow Patch Caridgan - Black			3
63214451 - Waffle Knit Shawl Collar Cardigan - Black			39
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather			0

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

Showing or Hiding Images

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

Figure 17–20 Hide Images

			8/8/2020
54291800 - Contrast Elbow Patch Caridgan - Black			3
63214451 - Waffle Knit Shawl Collar Cardigan - Black			39
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather			0

- Lock Selected Rows
- Unlock Selected Rows
- Unlock All Positions
- Manage Attributes
- View/Manage Images
- Hide Images**
- Show 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

	Lock Selected Rows	8/15/2020	8/22/2020	8/29/2020	9/5/2020
54291800 - Contrast Elbow Patch Cardigan - Black	Unlock Selected Rows	3	3	3	3
	Unlock All Positions				
	Manage Attributes				
	Show Images				
	Show Attributes				
63214451 - Waffle Knit Shawl Collar Cardigan - Black		39	39	39	39
65945004 - Waffle Knit Shawl Collar Cardigan - Pearl Heather	0	0	0	0	0

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

Figure 17–22 Image Display with Axis Pivot

	54291800 -	63214451 - Waffle	65945004 - Waffle	70063172 - Merino	72939751 - Merino	73137693 - Merino	77316938 - Angled
							
Fcst Sales U	3	39	0	0	0	0	0
Base Unit Price R	130.00	100.00	100.00	160.00	160.00	160.00	200.00
WP Event							
WP Sales Reg R	0	0	0	0	0	0	0
WP Sales Reg U	0	0	0	0	0	0	0
WP Sales Reg AUR	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WP Sales Promo R	0	0	0	0	0	0	0
WP Sales Promo U	0	0	0	0	0	0	0

The default No Image icon is displayed when no image is associated with the dimension position. If an image URL is associated but RPAS CE 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 RPAS CE 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*

	2/29/2020	3/7/2020	3/14/2020	3/21/2020	3/28/2020
Wp Sales R	69,236.49	69,230.05	69,318.22	70,834.28	
Fcst Sales R	69,236.49	69,230.05	69,318.22	70,834.28	
Wp Sales R var Fcst %	0.0%	0.0%	0.0%	0.0%	
Ly Sales R	69,236.49	69,230.05	69,318.22	70,834.28	
Wp Sales R var Ly %	0.0%	0.0%	0.0%	0.0%	
MP Wp Sales R contrib Prod %	2.0%	6.4%	7.5%	7.8%	
MP Ly Sales R contrib Prod %	2.3%	2.8%	2.8%	3.1%	
MP Wp Sales R contrib Time %	1.6%	1.6%	1.7%	1.7%	
MP Ly Sales R contrib Time %	1.7%	1.7%	1.7%	1.7%	
Wp Returns R %	39.9%	39.8%	39.9%	39.8%	

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.

User Data Preferences

As Oracle Retail evolves its Cloud Services, we are looking for opportunities to offer enhanced, high-quality service to you, our customer. RPAS CE collects product and journey data, which provides information that will enable a better understanding of actual application usage. These insights will allow Oracle Retail to make data-driven RPAS CE product management decisions.

When you first log in, you will receive a notification that you must set your User Data Preferences. To uphold Oracle's commitment to data privacy, you must understand and consent to the data collection. The User Data Preferences dialog box contains links to detailed information. No data collection will occur until you give opt-in consent.

Navigate

To manage User Data Preferences, open the taskflow:

1. Click **Administration**.
2. Click **User Preferences**.
3. Click **User Data Preferences**.

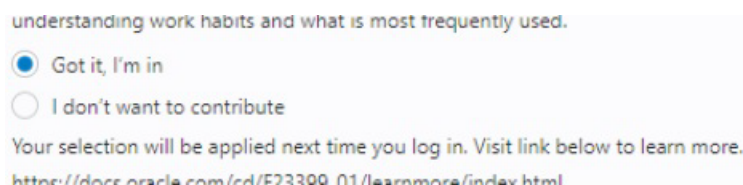
Consent

In the User Data Preferences dialog, you have the option to consent to the data collection or opt out. Data privacy information describing the data collected and its use is provided in the dialog. You can also find more information on the use of analytics services in the *Oracle Retail Predictive Application Server and Applications Cloud Edition Security Guide*.

Opt-in

To opt-in:

1. Select **Got it I'm in**



2. Click **Finish**.
3. Re-login to the application to apply your changes immediately.

Opt-out

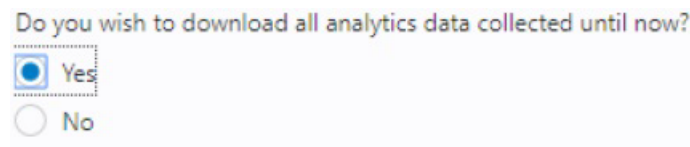
To opt-out:

1. Select **I do not want to contribute**.
2. Click **Finish**.
3. Re-login to the application to apply your changes immediately.

Data Access

You can request a copy of your data collected:

1. Select **Yes** to download analytics data collected.



2. Click **Finish**.

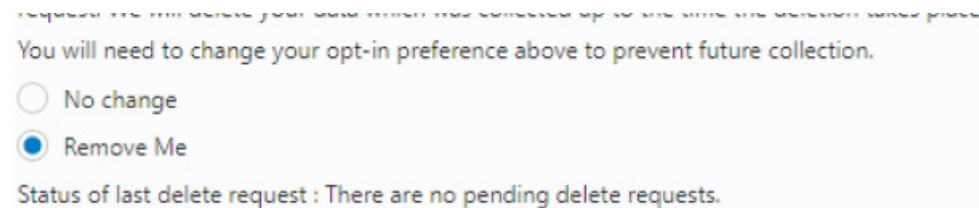
When the data is available for download, you will receive a popup notification with a URL to the download location. You will have seven days to download the data before it is purged.

Right-to-be-forgotten

Request Deletion

To request deletion of your collected data:

1. Select **Remove Me** to have your collected data removed.



2. Click **Finish**.

Check Deletion Status

The status of your last deletion request can be viewed in the User Data Preferences dialog.

Troubleshooting

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

Accessing Multiple RPAS CE Applications

A user may need to access multiple RPAS CE applications, such as MFP, A&IP, and RDF, 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.

