Oracle® Retail Predictive Application Server Cloud Edition

User Guide

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Oracle Retail Predictive Application Server Cloud Edition User Guide, Release 25.2.301.0

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Primary Authors: Melissa Artley, Archana Prabhakar

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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.

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This User Guide is intended for retailers and analysts.

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1

Getting Started

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

Overview

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

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

Essential Concepts

RPASCE provides capabilities such as a multidimensional database structure, batch and online processing, a configurable slice-and-dice user interface, a sophisticated configurable calculation engine, user security, and utility functions such as importing and exporting, all on a highly scalable technical environment that can be deployed on a variety of hardware.

This section describes the basic concepts of RPASCE.

Multidimensionality

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

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

Dimensions, Levels, and Positions

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

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

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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

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

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

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

With a solution task-flow, you are logged into a solution. When you pick a particular task, you are directed to build a segment. 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 RPASCE 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 Roll Up

A dynamic roll up of hierarchies can be done without rebuilding the workspace. Examples include Store to Cluster aggregations, or item roll ups by Product Attribute. These dynamic aggregations are triggered by using a custom menu and the user may nest their roll ups with a maximum of three levels. 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.

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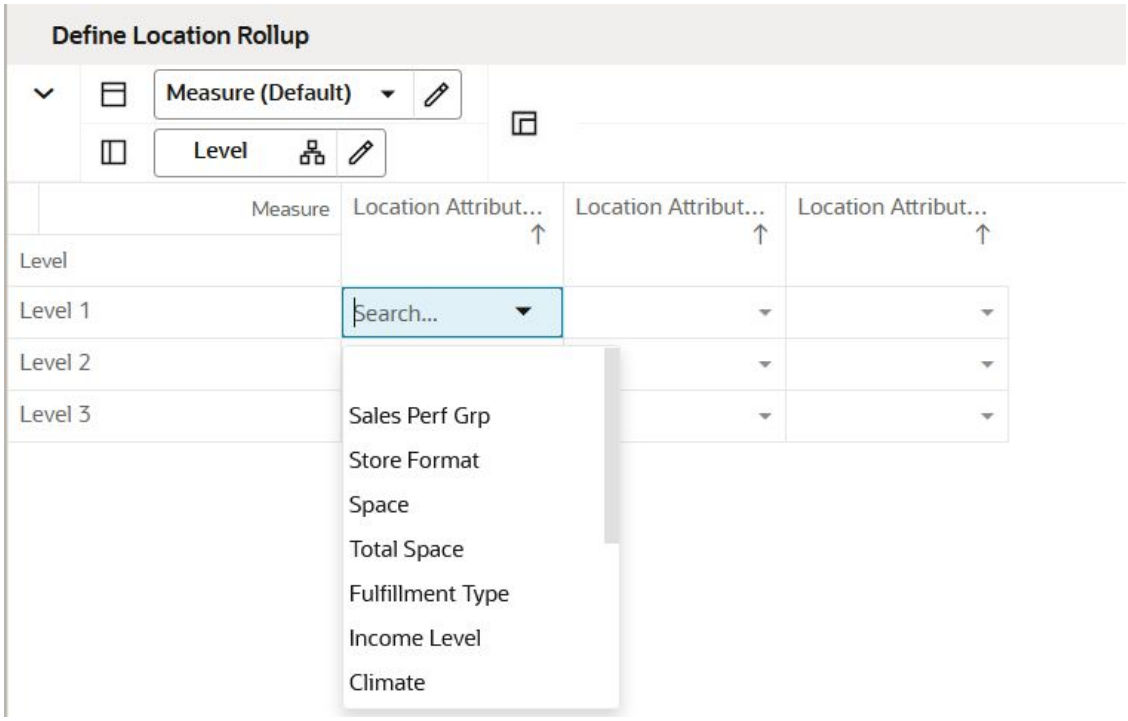
Figure 1-1 Dynamic Hierarchy



Setting Up Your Browser

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

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**.

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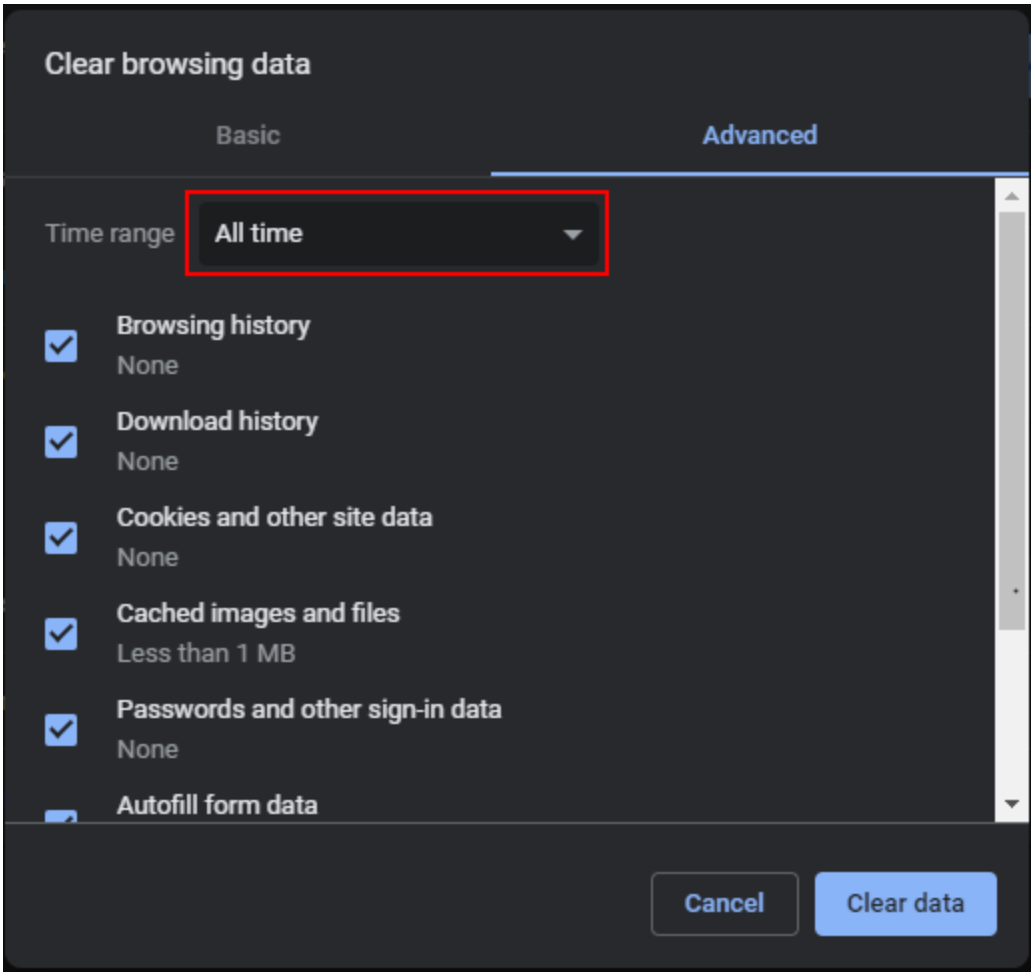
Figure 1-2 Chrome Clear Browser Cache



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**.

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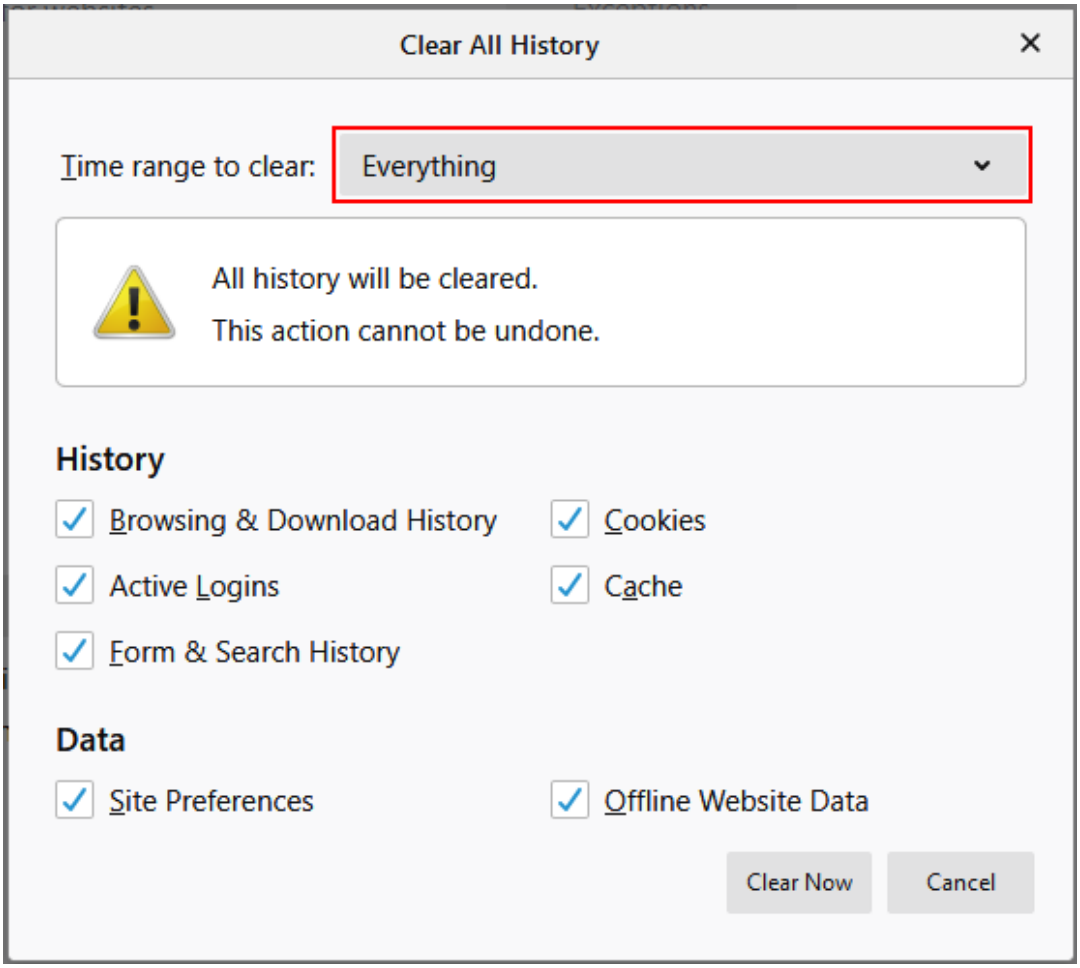
Figure 1-3 Firefox Clear All History



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**.

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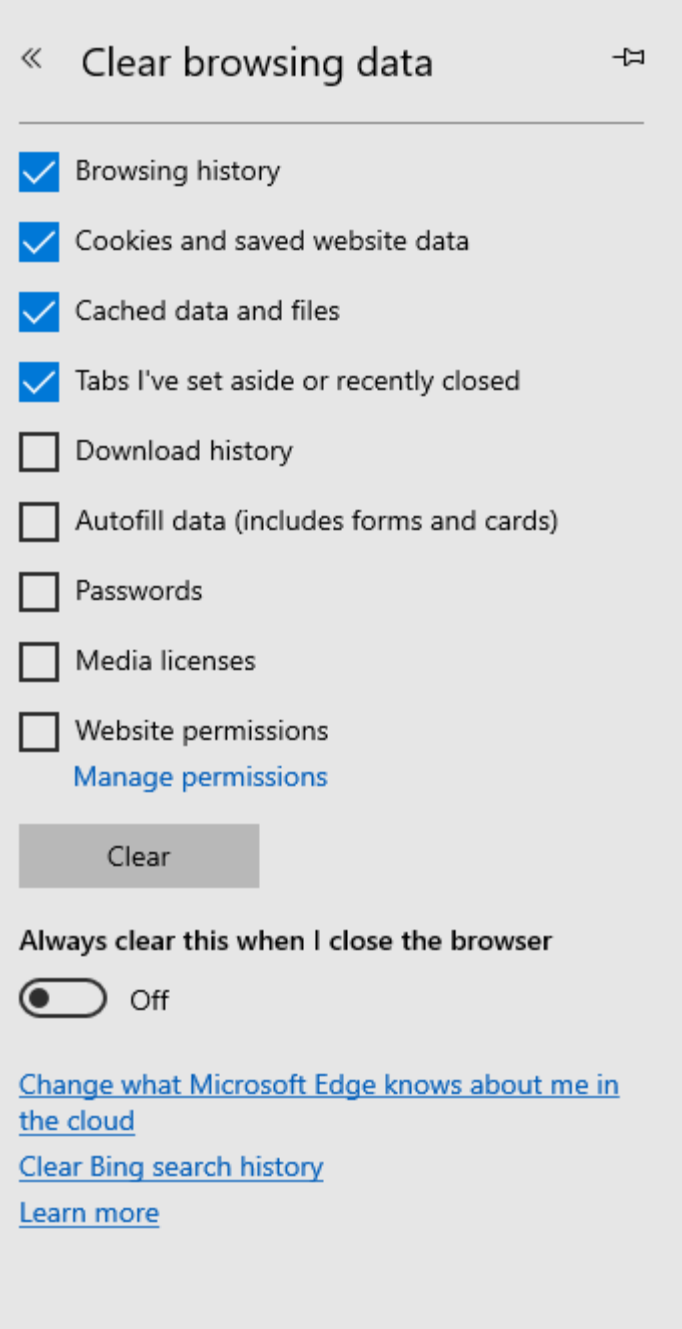
Figure 1-4 Edge Clear Browsing Data



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.

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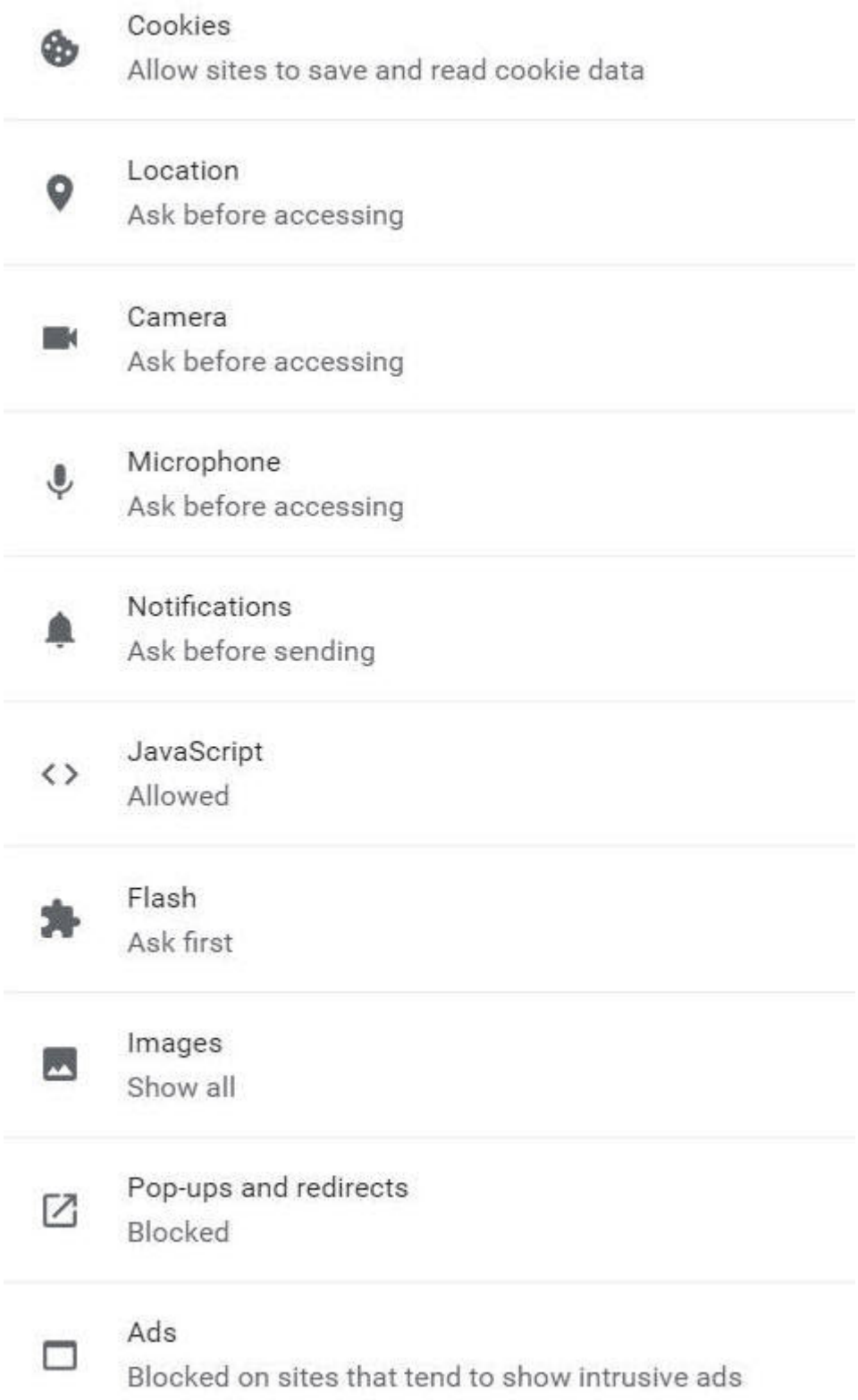
Figure 1-5 Chrome Content Settings



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

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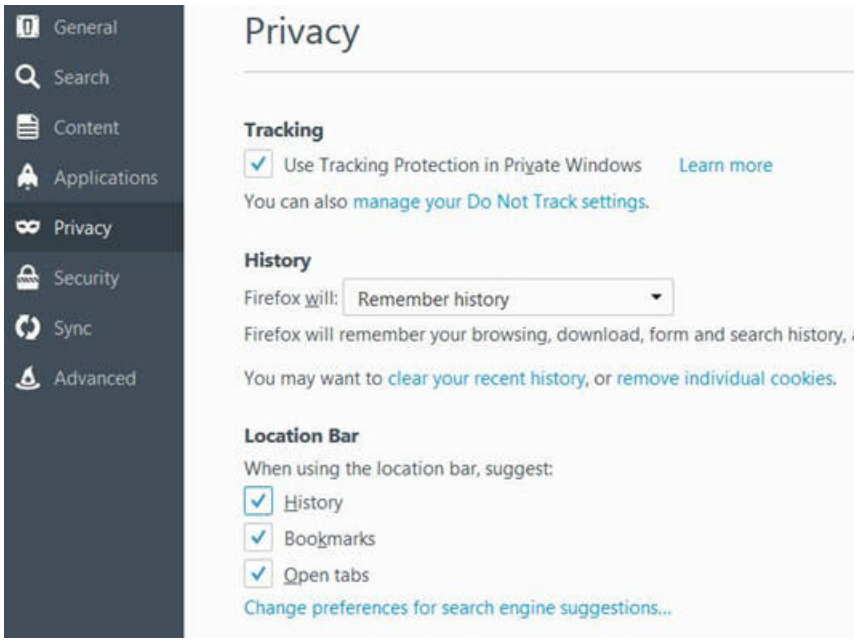
1. Click the Tools list button and select **Options**.
2. Select the **Privacy** panel.
3. Check for **History**.

Figure 1-6 Firefox Privacy Panel



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

Logging Into RPASCE

This section details the available logging scenarios.

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

After you check the configuration, obtain the following information:

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

  http://<fullyqualifieddomainname>:<port>/context root
- **User name and Password:** Based on the tasks you want to perform, obtain a user account (that includes user name and password) to log into the application.

Logging In Using Single Sign-On

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

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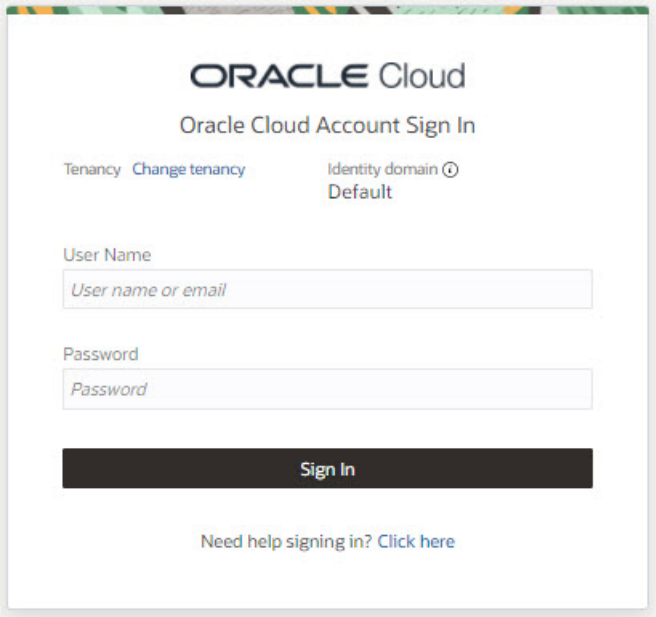
> **Note**
>
> For more information about single sign-on (SSO), see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Logging in Using Oracle Cloud Infrastructure Identity and Access Management

If you are using Oracle Cloud Infrastructure Identity and Access Management (OCI IAM), you see the RPASCE login page, as shown in the following figure. Enter values in the User Name and Password fields and click **Sign In** to access the RPASCE home page.

Figure 1-7 Oracle Cloud Infrastructure Identity and Access Management Login



Logging in Using Oracle Identity Cloud Service

If you are using Oracle Identity Cloud Service (IDCS), you see the RPASCE login page, as shown in Figure 1-8. Enter values in the User Name and Password fields and click **Sign In** to access the RPASCE home page.

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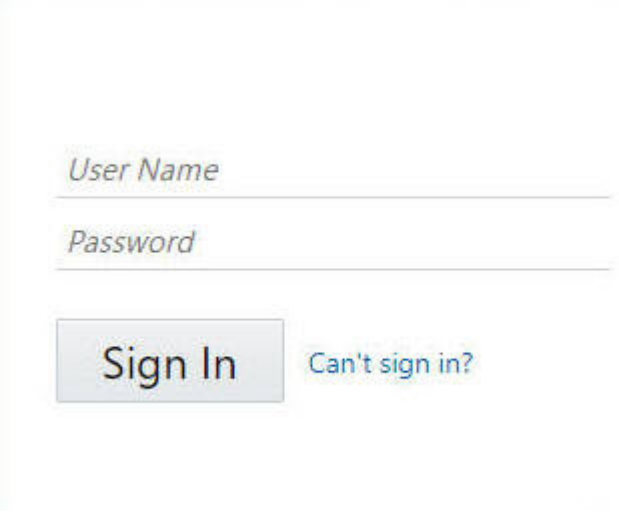
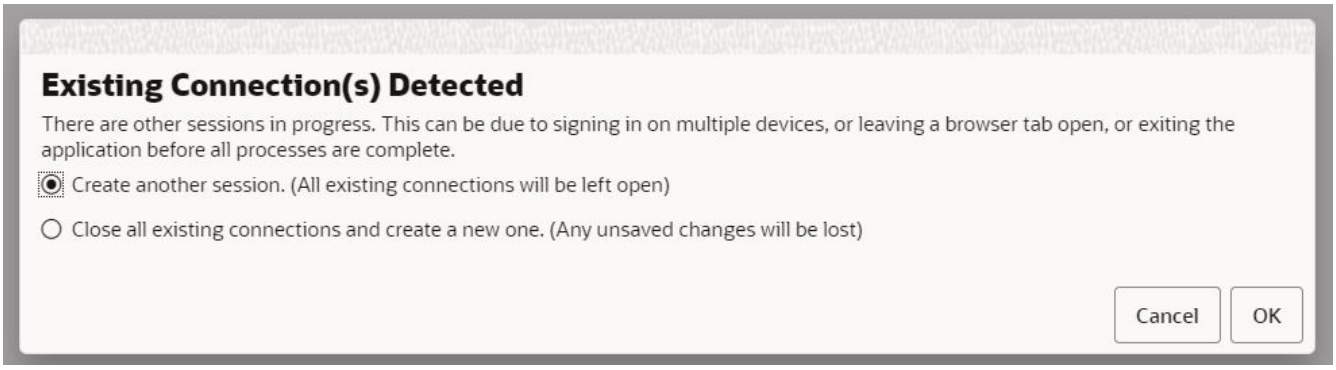
Figure 1-8 Oracle Identity Cloud Service Login



Concurrent Sessions

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

Figure 1-9 Creating Concurrent Session



Select one of the following options:

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

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

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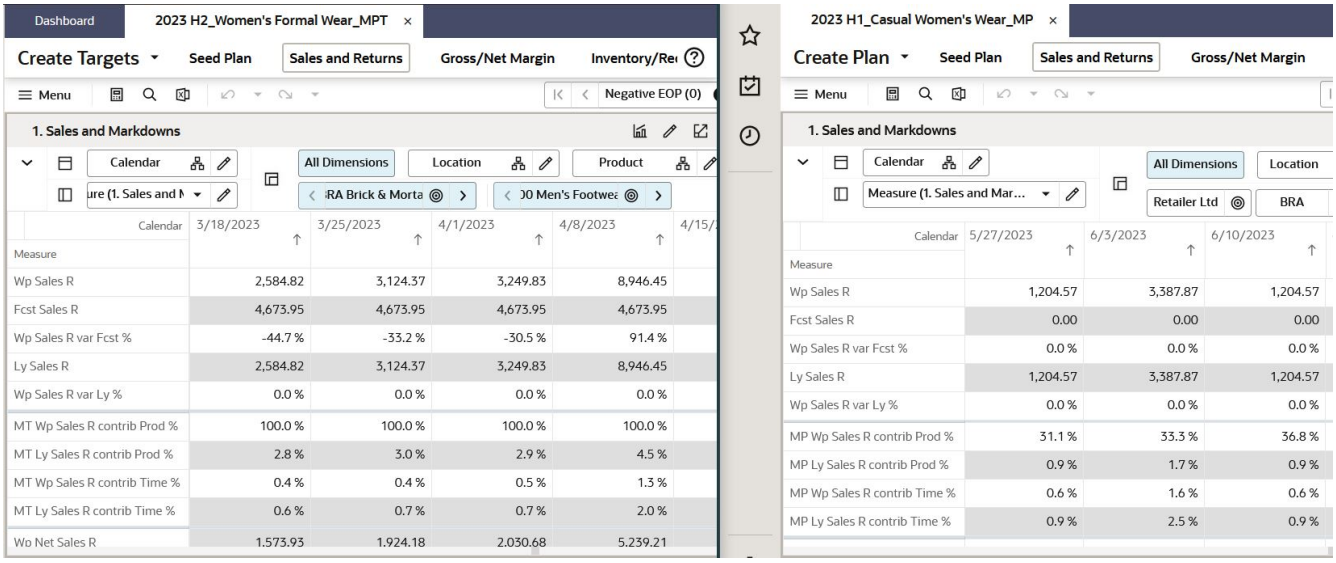
Comparative Analysis

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 1-10 Compare Workspaces in Separate Browser Tabs



This is 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 Launch . 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 RPASCE. You are not limited to comparing the one workspace that you opened; you can switch between workspaces, bring up other segments, and conduct separate planning processes using the secondary login.

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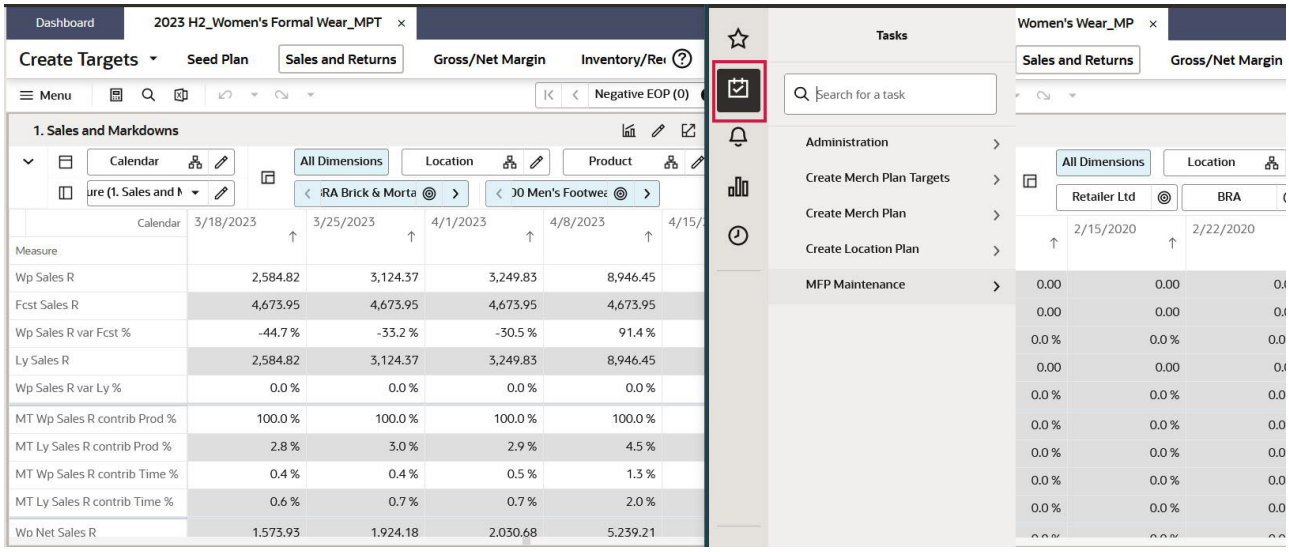
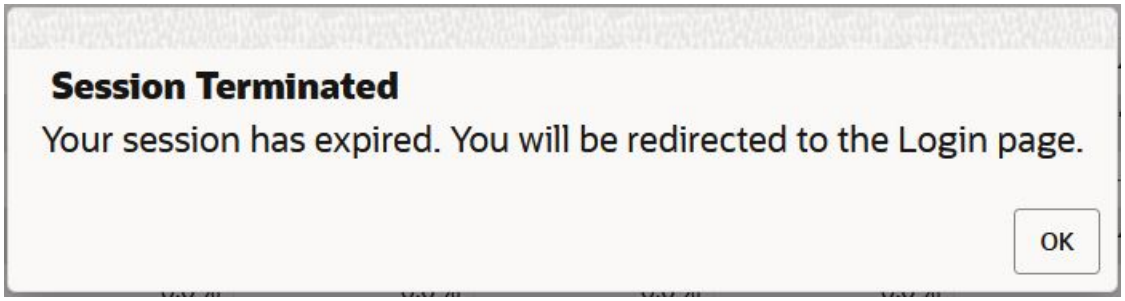
Figure 1-11 Compare Views in Concurrent Login Sessions



Session Expiration

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

Figure 1-12 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 system displays a Session Timeout message with timer. This message displays for five minutes before the system logs off. This helps you choose to either logout or to continue working. Once the time is up, the session times out and displays the session

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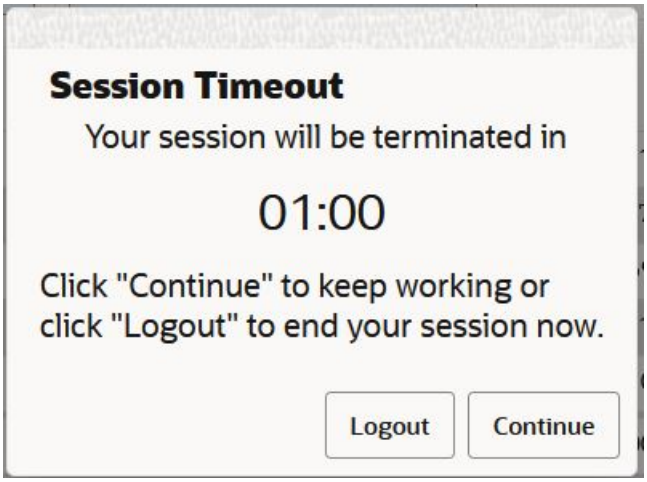
expiry message. The following figure shows the session time out message. In this case, contact the cloud system administrators in order to increase the timeout.

Figure 1-13 Session Timeout Message



- 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 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 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

From the branding bar (top left side), click **Navigation Menu** and then select **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 RPASCE, each solution (spanning across multiple workspaces) is represented by a taskflow.

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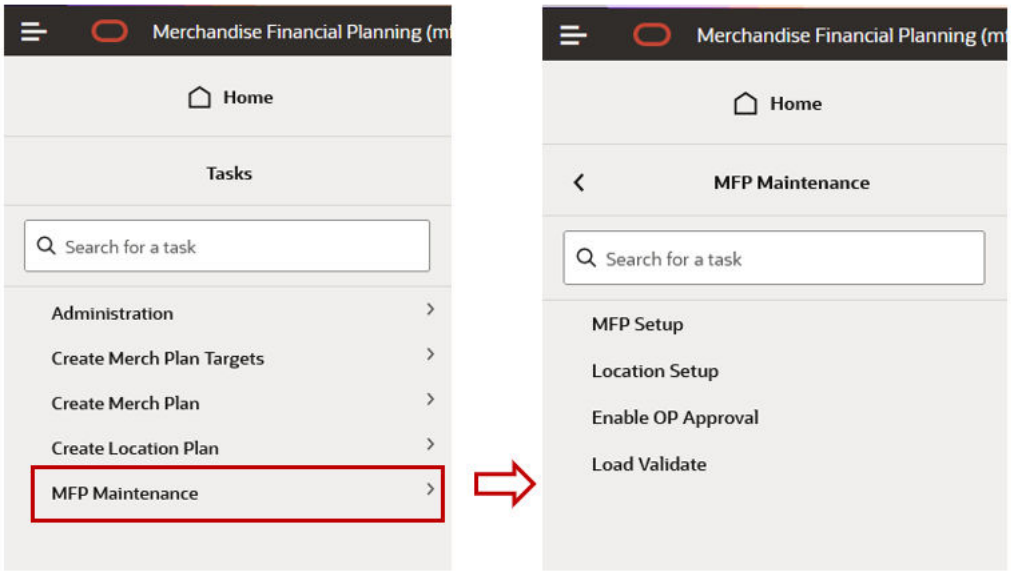
Figure 1-14 Taskflow



- In the taskflow, you can click the arrow 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.
- To return to the Main Menu, click **Home**.

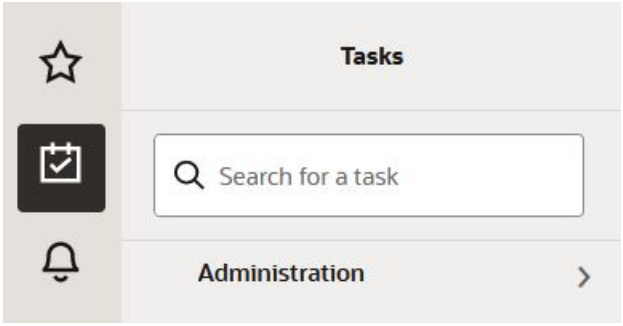
Access-Based Visibility

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



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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 RPASCE, all changes to a workspace are automatically saved when any calculation or other workspace action is performed on the workspace.

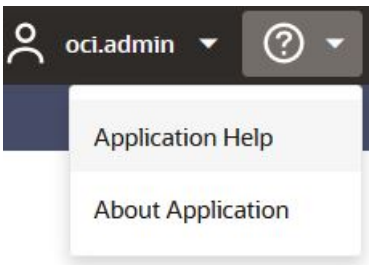
Workspace Operations

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 Figure 1-17 provides information about the application including version numbers for the domain, RASL, application, and plug-ins. Figure 1-17 shows an example for MFP Cloud Service.

Figure 1-17 About Application Window

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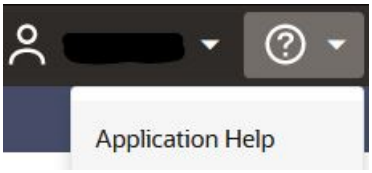
Accessing Online Help

Click the Question Mark icon in the top right, as shown in Figure 1-16. Click **Application Help** to access the online help.

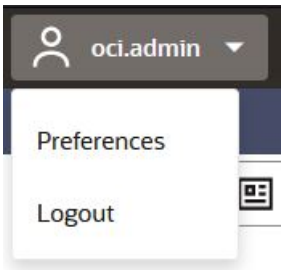
Figure 1-18 Accessing Online Help



Logging Out of the Application

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

Figure 1-19 Logout



Contextual Help

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

Figure 1-20 Contextual Help Icon

The planner can use Contextual Help to access the various documentations relevant to their business process. Users can link external files which contain customer-specific process flows, user guides, measure calculations, and videos. The customer can update and maintain the required content per the business process.

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Oracle Guided Learning

RPAS Cloud Edition includes Oracle Guided Learning (OGL) to provide you in-application guidance to simplify and accelerate your adoption of your Oracle Retail Cloud Service. OGL offers guides tailored to your role and/or experience level. The guides also include helpful information about new features in each cloud update and the ability to provide Oracle feedback through Surveys.

OGL is an Enterprise cloud platform that supports personalized, guided, and contextual user onboarding visualizations. For more information, see the Oracle Guided Learning User Guide at the following URL.

https://docs.oracle.com/en/education/oracle-university/guided-learning/user-guide/

To access guided learning, click the Guided Learning icon.

Figure 1-21 Guided Learning Icon

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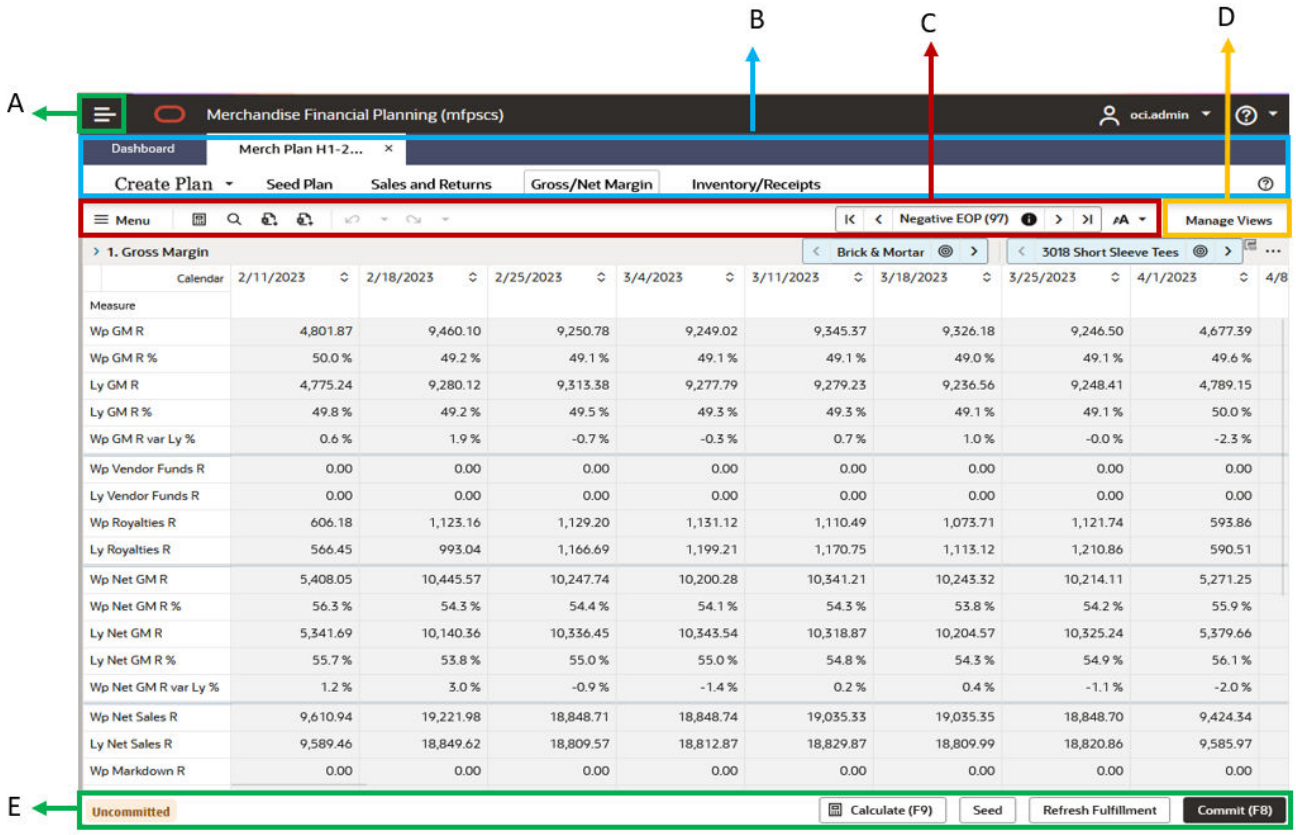
2

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



Key for Figure 2-1:

A: Navigation Menu

B: Mega Menu

C: Quick Access Toolbar

D: View Management

E: Action Buttons

Navigation Menu

The Navigation menu contains the following options:

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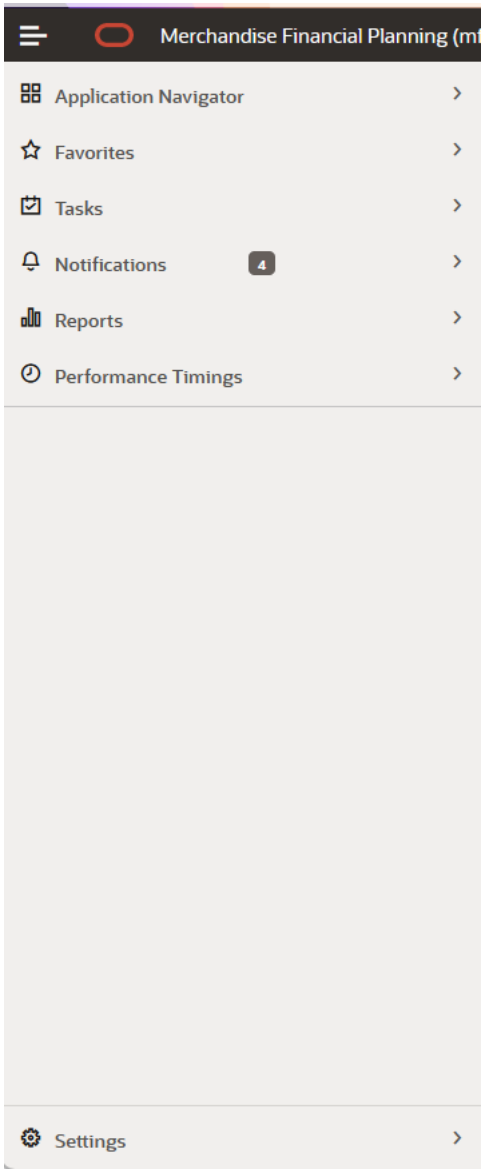
- Application Navigator
- Favorites
- Task
- Notifications
- Reports
- Performance Timing Log
- Settings

Figure 2-2 Navigation Menu



Application Navigator

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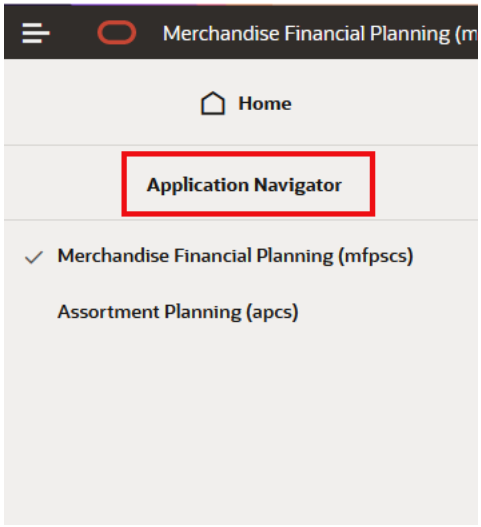
The Application Navigator displays the list of authorized applications beneath its menu. You can switch between applications that are launched in separate browser tabs. You can see the dashboard profiles and specific tasks based on the selected application.

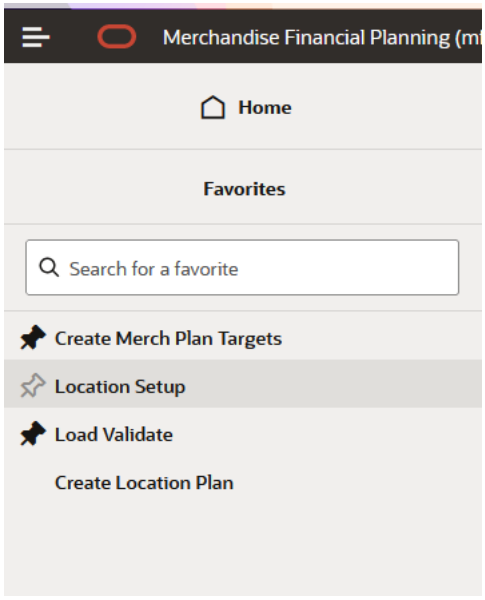
Figure 2-3 Application Navigator to Access Applications



Favorites

The Favorites option provides you the ability to bookmark the templates that are often used. It provides quick and easy access to frequently used work flows. These bookmarks save you navigation time through the task list. For more details, refer to Favorites in this guide.

Figure 2-4 Favorites



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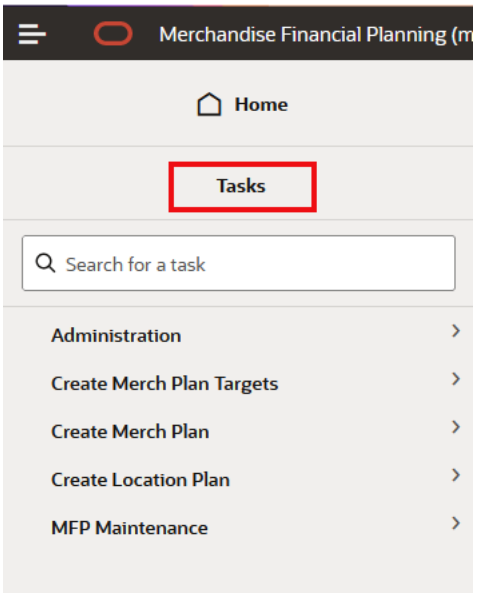
Task Module

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

Figure 2-5 Task Module for Access to Segments Window



Notifications

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

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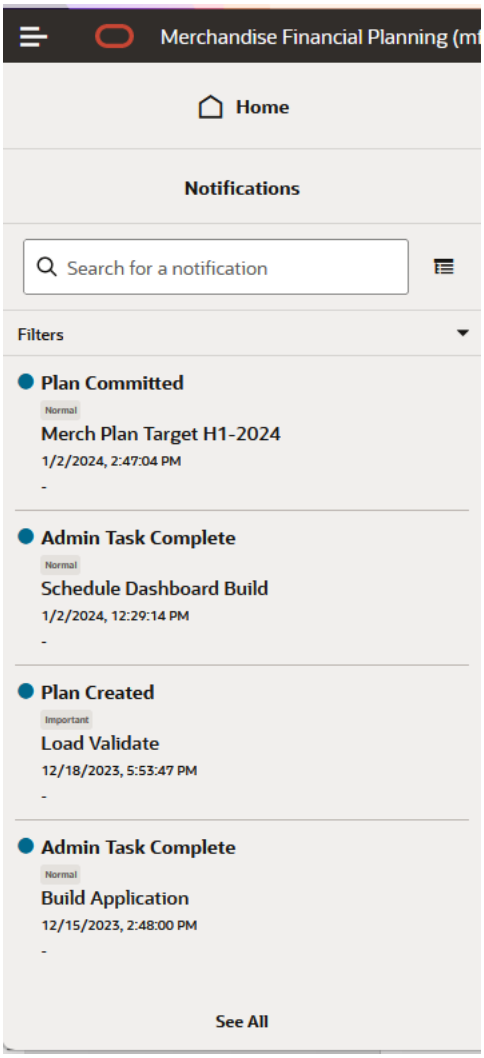
Figure 2-6 Using Notifications



Reports

You can use the Reports module to view the reports or dashboards available with in the application. Also use this module to link Data Visualization (DV) Reports. You can launch DV reports from the Planning application into separate browser tabs. For more details on linking DV reports with the Planning application, refer to the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

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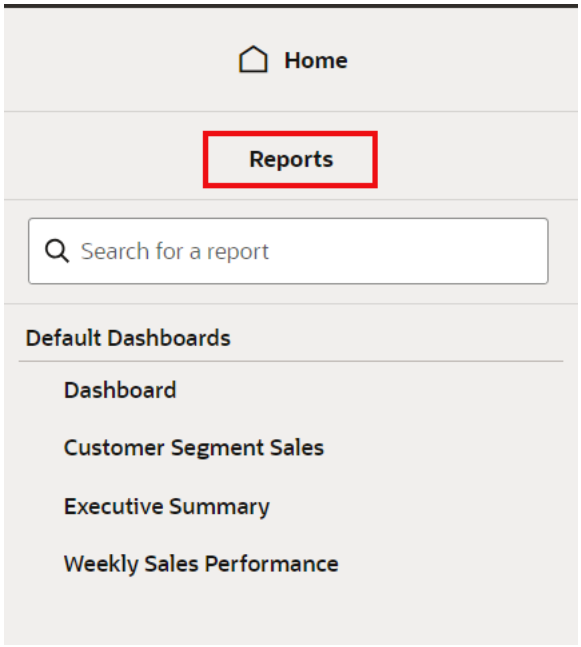
Figure 2-7 Reports Module



Settings

You can use the settings to update UI property files easily and quickly. This provides self service capability for administrator users.

> **Note**
>
> For more information, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Performance Timing Log

The performance timing log allows you to export or display performance values for the current user. It can be enabled using the administration system configuration feature.

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.

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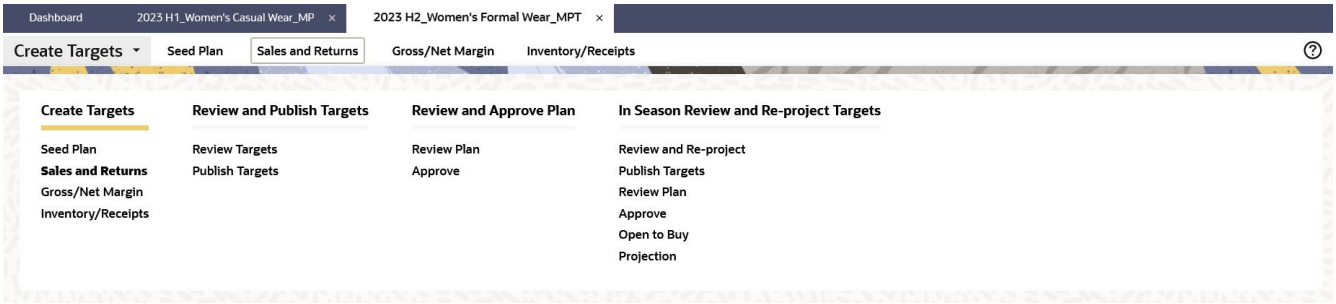
Figure 2-8 Mega Menu



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 2-9 Quick Access Toolbar

Menu

Menu contains the following menu options:

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

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Figure 2-10 Quick Access Toolbar Menu Options

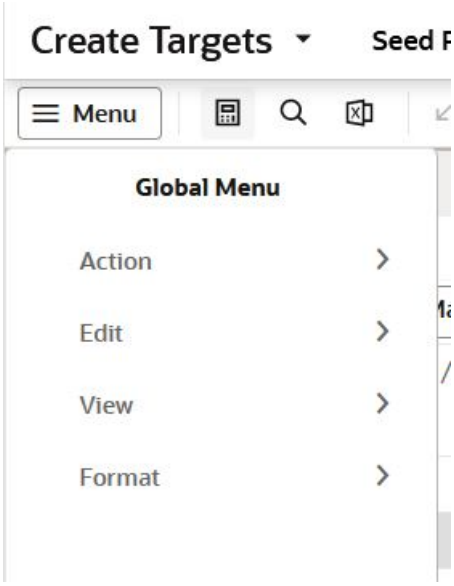

Table 2-1 lists the options within each menu.

Table 2-1 Toolbar Menu Options

Menu	Submenu	Lower Submenu
Action	Calculate (F9)	-
	Commit (F8)	-
	Refresh (Alt + F5)	-
	Refresh Attributes	-
	Find (Ctrl + F)	-
	Export	-
	Import	-
	Get New/Updated Attributes	-
	Add Positions	-
	Modify Positions	-
	Import Positions	-
Edit	Undo (Ctrl + Z)	-
	Find (Ctrl + F)	-
	Unlock All Cells	-
	Unlock All Measures	-
	Unlock All Positions	-
	Unlock All	-
View	Synchronize Z-Axis	-
	Restore Layout	
	View Layout	

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Table 2-1 (Cont.) Toolbar Menu Options

Menu	Submenu	Lower Submenu
	Format Edit Styles and Exceptions	-
	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 2-11 Action Menu

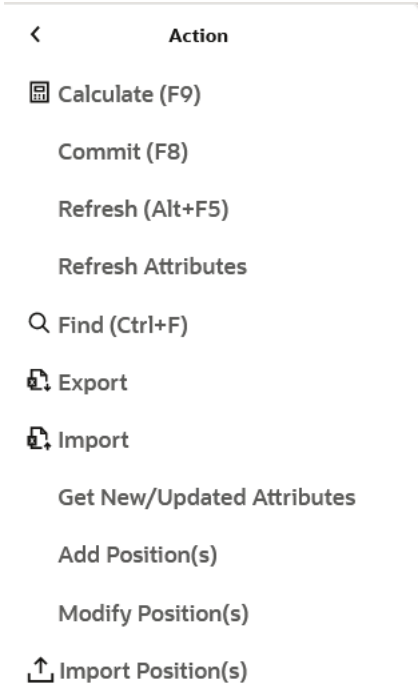

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Table 2-2 Action Menu Options

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.
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.
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.
Export	Use to export the data from view to excel or text file.
Import	Allows you to transfer large amounts of data to a pivot table using an Excel spreadsheet. You can upload writable measures using a template without the assistance of an Administrator.
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.

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Figure 2-12 Edit Menu

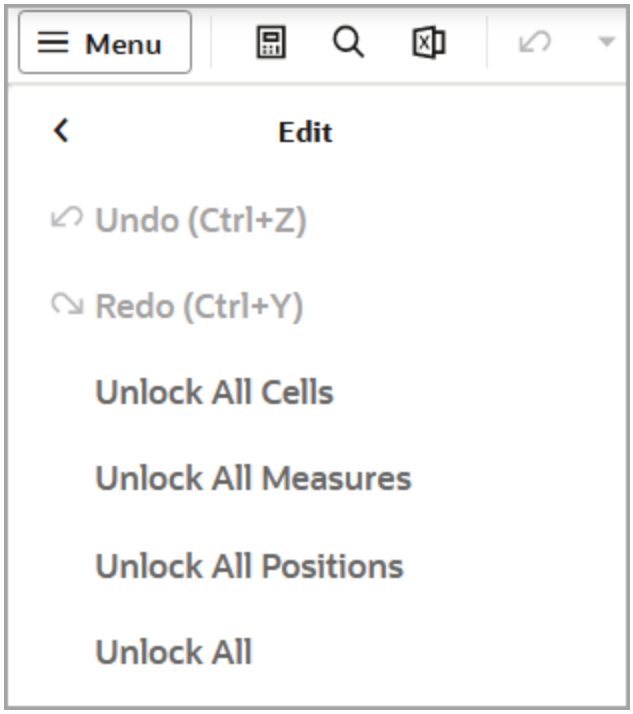

Table 2-3 Edit Menu Options

Menu Option	Description
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).
Unlock All Cells	Use to unlock all the locked cells on the current view.
Unlock All Measures	Use to unlock all the locked measures on the current view.
Unlock All Positions	Use to unlock all the locked positions on the current view.
Unlock All	Use to unlock all the locked cells, measures and positions simultaneously on the current view.

View Menu

This section describes the View Menu options.

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Figure 2-13 View Menu

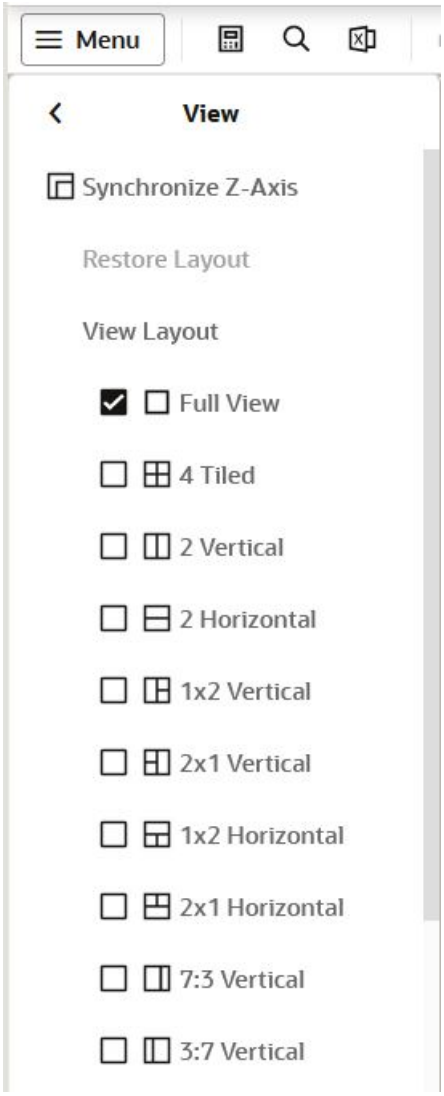

Table 2-4 View Menu Options

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.
Restore Layout	Use to restore view layout size to default. Restore Layout will be enabled only when you resize the view manually.
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.

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Figure 2-14 Format Menu

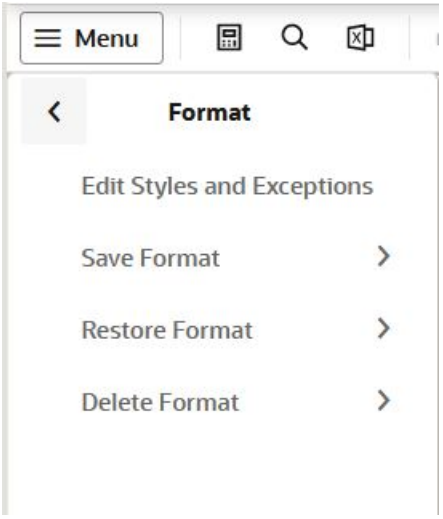

Table 2-5 Format Menu Options

Menu Option	Sub-Menu	Description
Edit Styles & Exceptions		Opens the Format window. 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 Formatting.
Save Format	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 are able to see and edit the formatting.
	Workspace Template	Save format to the workspace template.
Restore Format	From Template	Restores my current formatting to the saved workspace template format.
	For My Group: Group Name	Restores my current formatting to my group's saved format.
Delete 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 Template	Deletes the saved format for workspace template.

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 **Action** menu.

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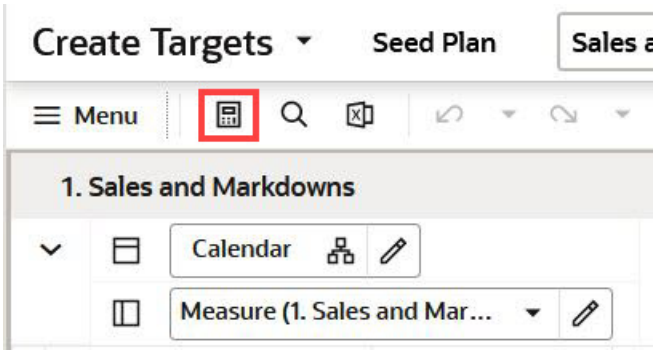
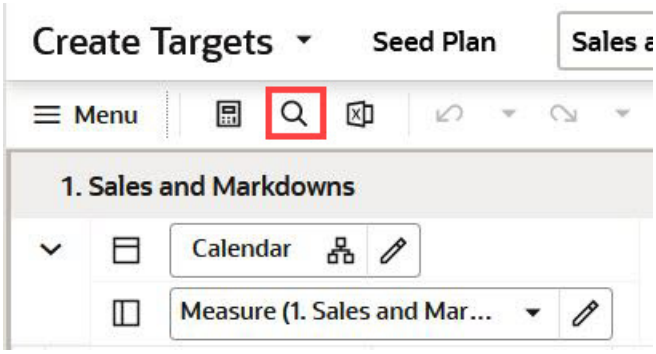
Figure 2-15 Calculate Button



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 open views or current view of the workspace or all dimensions or specific dimensions available in the current view.

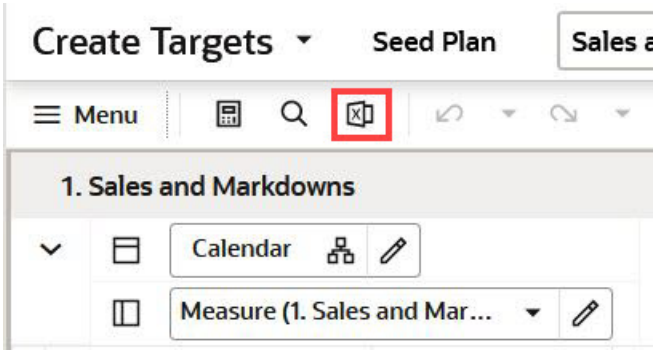
Figure 2-16 Find Button



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 window.

Figure 2-17 Export Button



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Importing Positions

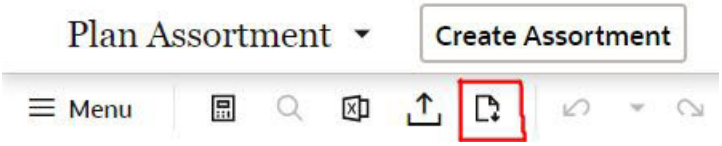
Import Positions is used to manually import a list of Placeholder positions that you have already entered in an Excel (.xslx) file format. It loads the positions listed in the file to the Add Product window for validation and highlights errors for corrections that are required. This facilitates the easy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

Figure 2-18 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.

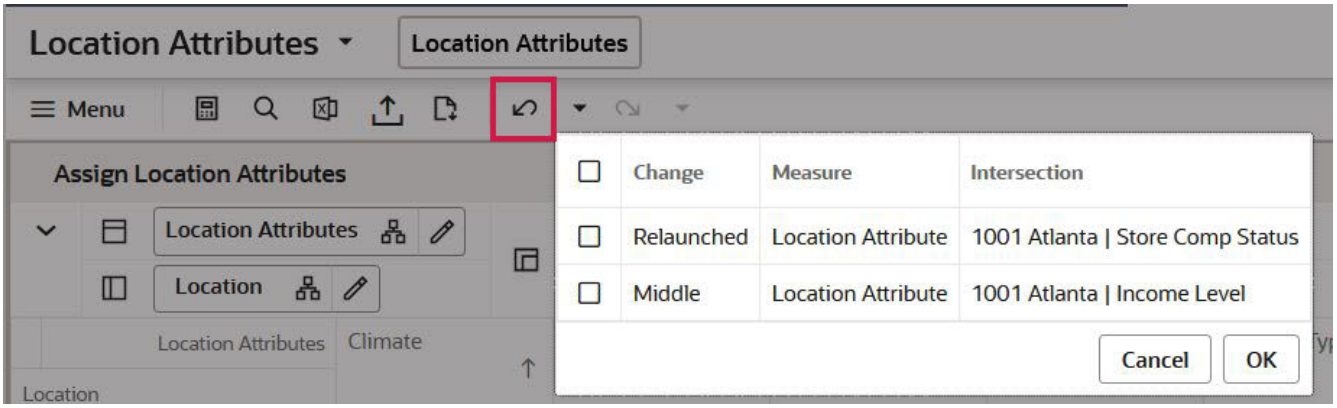
Figure 2-19 Download DPM Import Template File



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 in the Undo list, 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 2-20 Undo Button



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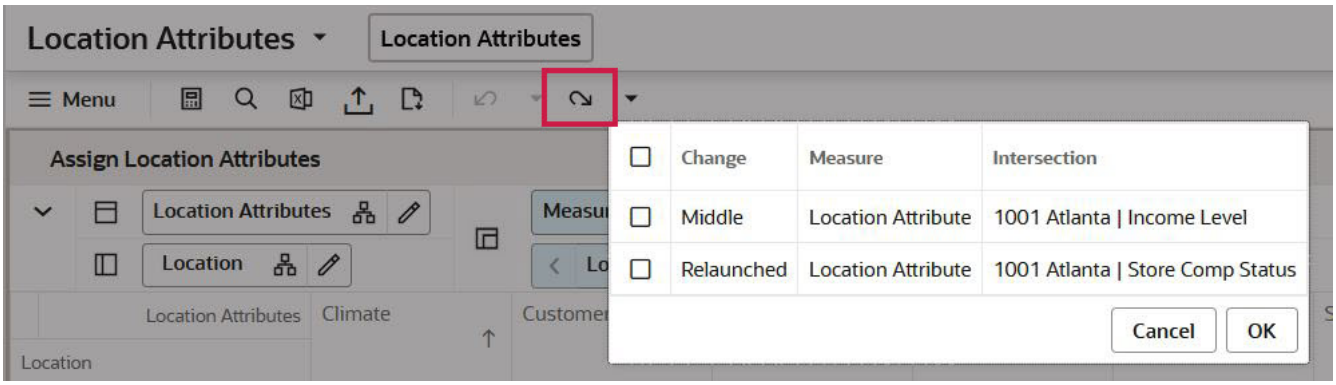
Redo

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 in the Redo list, 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 2-21 Redo



> **Note**
>
> If either an Single Hierarchy Select (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.

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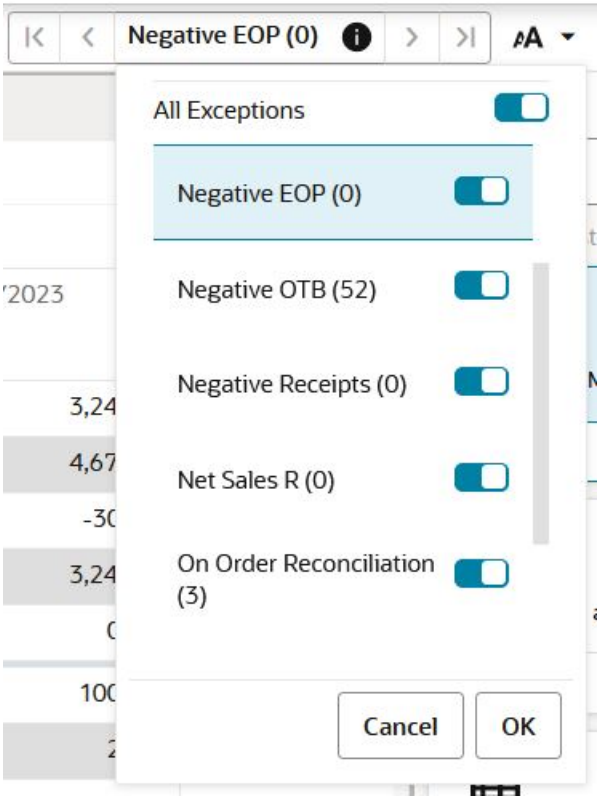
Figure 2-22 Real Time Alerts Exception List



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 2-23 Text Size Options

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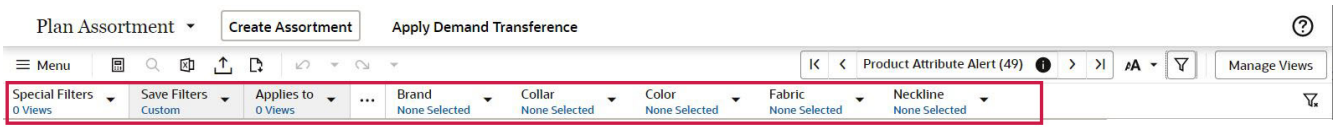
Workspace Filters

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 2-24 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. When a new workspace is built, the **Manage Views** drawer is collapsed and hidden by default.

Figure 2-25 View Management Drawer: Show

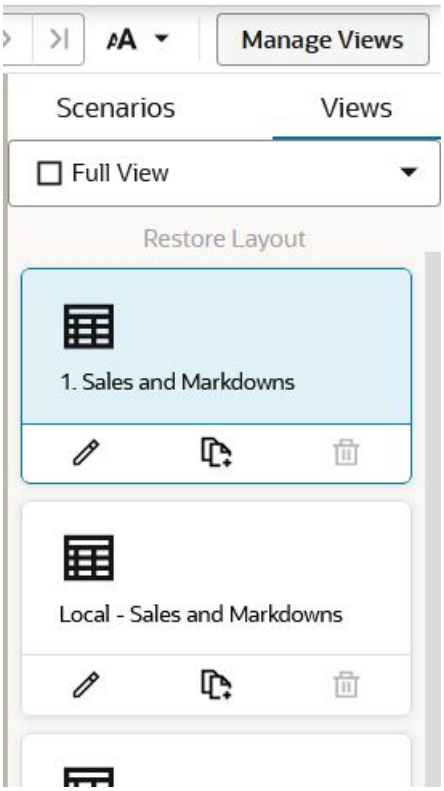


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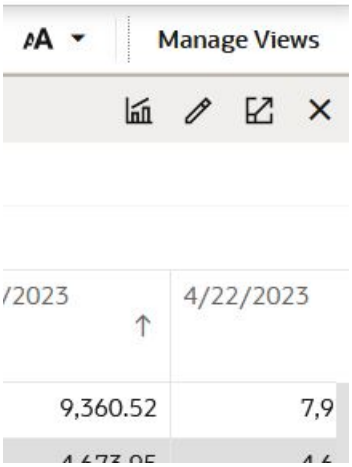
Figure 2-26 View Management Drawer: Hidden



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 2-27 shows the various components in the content area.

Figure 2-27 Content Area Components

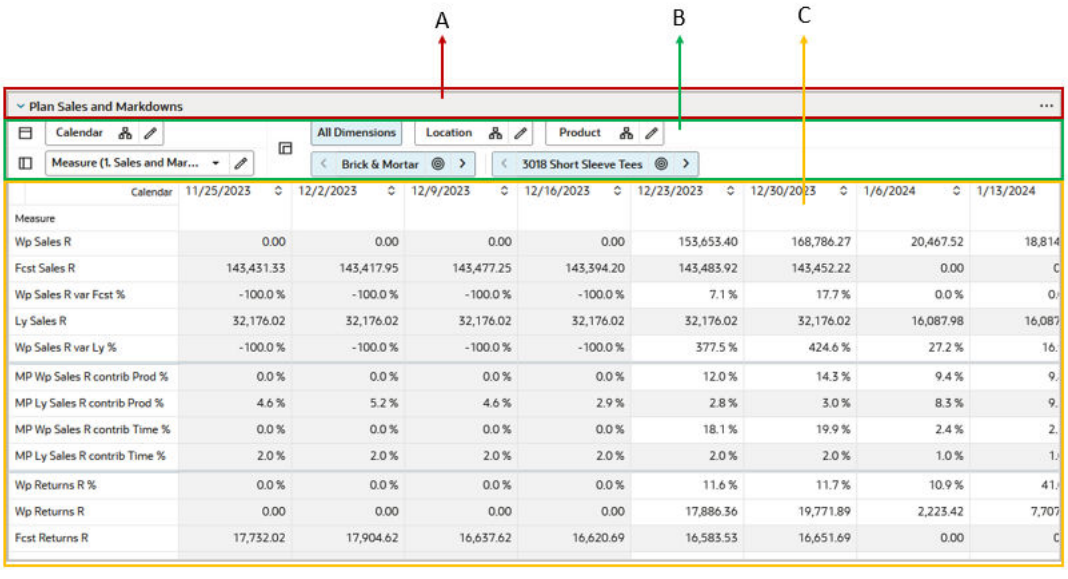


Table 2-6 describes the Content area.

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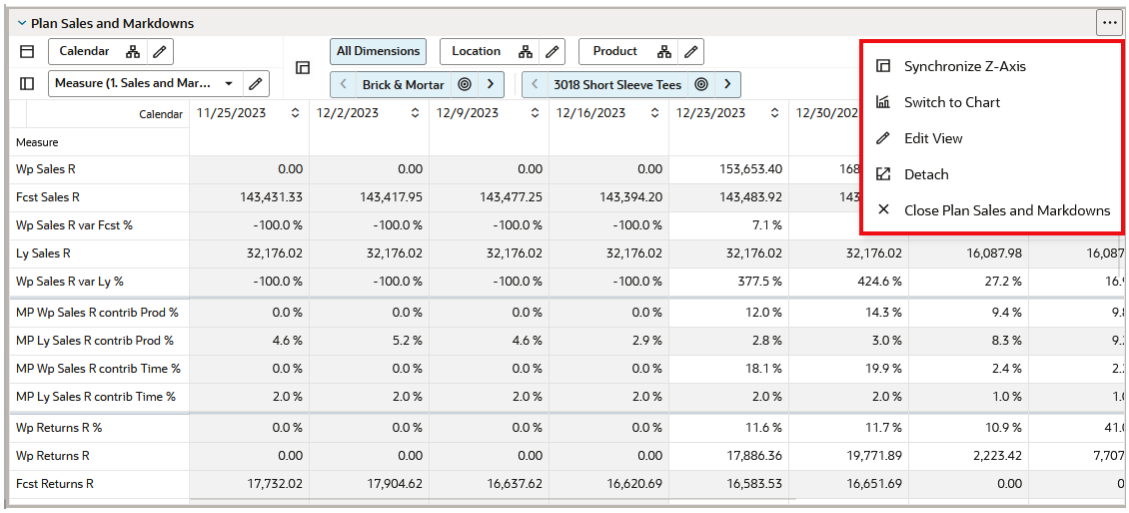
Table 2-6 Content Area

Legend	Area	Description
A	View Title Bar	Displays the name of the **View and Action** menu (ellipsis icon) includes View-level actions such as **Synchronize Z-axis**, **Switch to Chart**, **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.

Action Menu in the Content Area

As shown in the following image, the view's Action menu in the Content Area includes the actions for the displayed views such as **Synchronize Z-axis**, **Switch to Chart**, **Edit View**, **Detach**, and **Close** <View name> where <View name> is the current view.

Figure 2-28 Action Menu



Page Edge and Dimension Tiles Area

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

The RPASCE Client is designed to help you to work with the easy selection of dimension levels within the Edit view. You can manage the way the information is presented in a view. You can arrange and present the information in a layout you want by rotating or pivoting dimensions across the axes, changing the data roll ups and measure profiles and showing or hiding measures. You can view the information at a low level of detail or aggregate to view the information at summary levels.

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When the workspace is built, the Page Edge and Dimension tile area is collapsed by default. You can expand it using the **Expand/Collapse** button (arrow icon) that is available from the top left side. Only the Page Edge scroll and Action menu display when the Page Edge and Dimension Tile area is collapsed.

Figure 2-29 Page Edge and Dimension Tiles Area (Expanded)

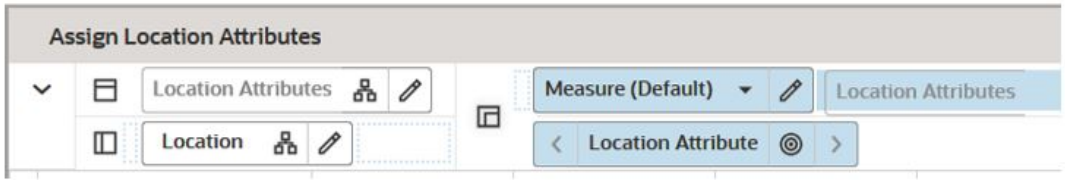
Figure 2-30 Page Edge and Dimension Tiles Area (Collapsed)

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.

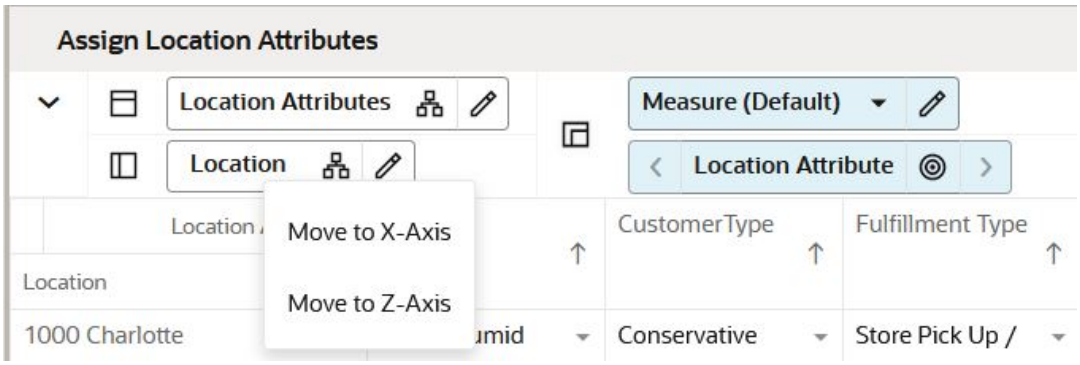
- **Dimension Move:** Moves a dimensional layer to another position on an axis. To perform a dimension move, in the Dimension Tile Area click and hold the dimension tile you want to move. Then, drag the tile next to the area you want and release the mouse.

Figure 2-31 Dimension Move - Drag & Drop



Alternatively, you can move dimension by right- clicking the dimension tile. To move dimension tile, right- click on tile you want to move and select the destination axis option to which you require to move the dimension tile.

Figure 2-32 Dimension Move - Right- click Option



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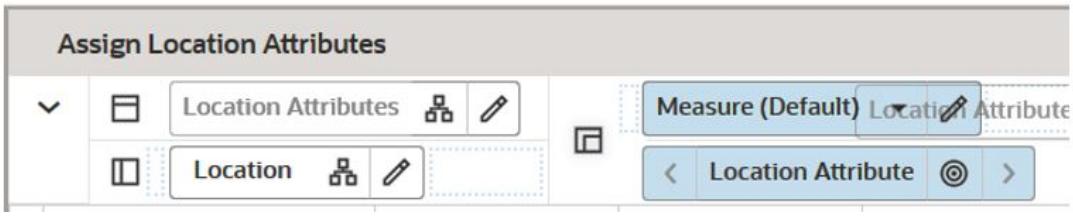
To move the dimension tile along the axis, right- click on the tile you want to move and select the move along axis option. This option will move the tile along the axis when two dimension tiles are placed at same axis.

- **Dimension Swap:** Swaps a dimension with another dimension on the axis. To perform a dimension swap, in the Dimension Tile Area, click and hold the dimension tile you want to move. Then, drag the dimension tile over the one you want to swap it with and release the mouse.

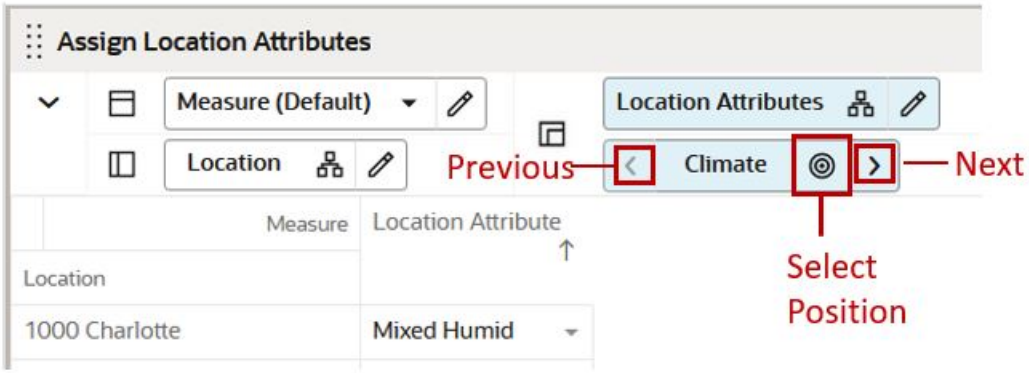
Figure 2-33 Dimension Swap



Paging and Position Navigation

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

Figure 2-34 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.

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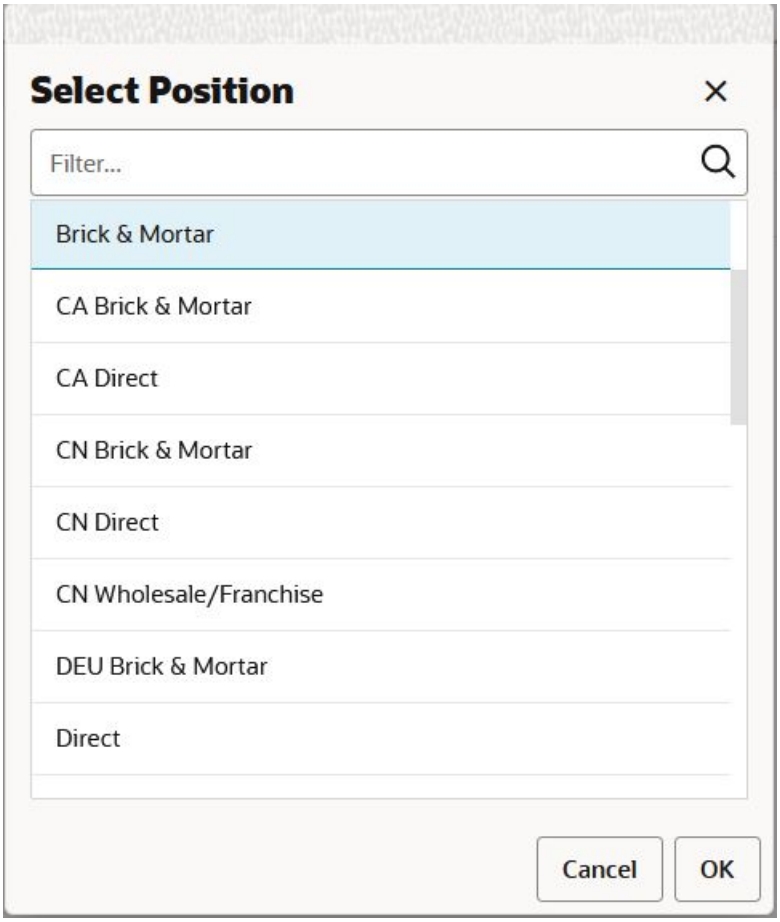
Figure 2-35 Select Position



Edit View

Using the Edit View window, 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 2-37.

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When the Page Edge and Dimension Tile area is collapsed, you can synchronize the Z-axis using the view's Action menu. In the collapsed Page Edge area, a synchronized view is displayed using the Z-axis synchronized icon, as shown in Figure 2-38.

Figure 2-36 Before Synchronizing Page Edge (Z-axis)

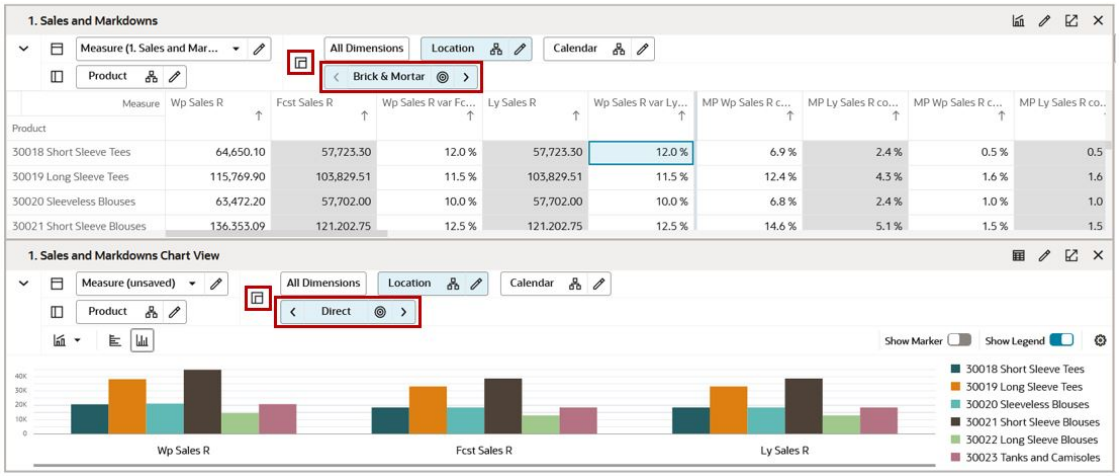

Figure 2-37 Enabling Synchronize Z-axis

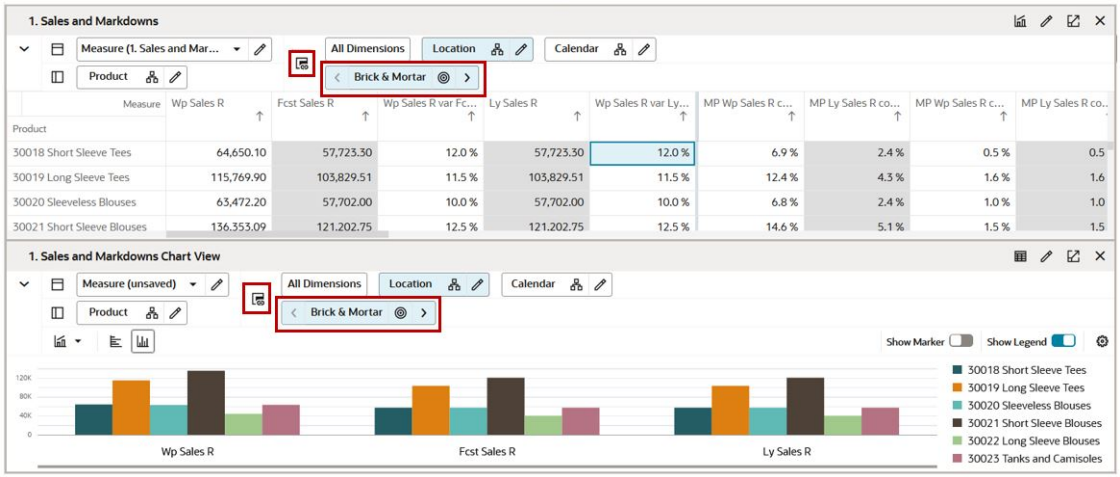

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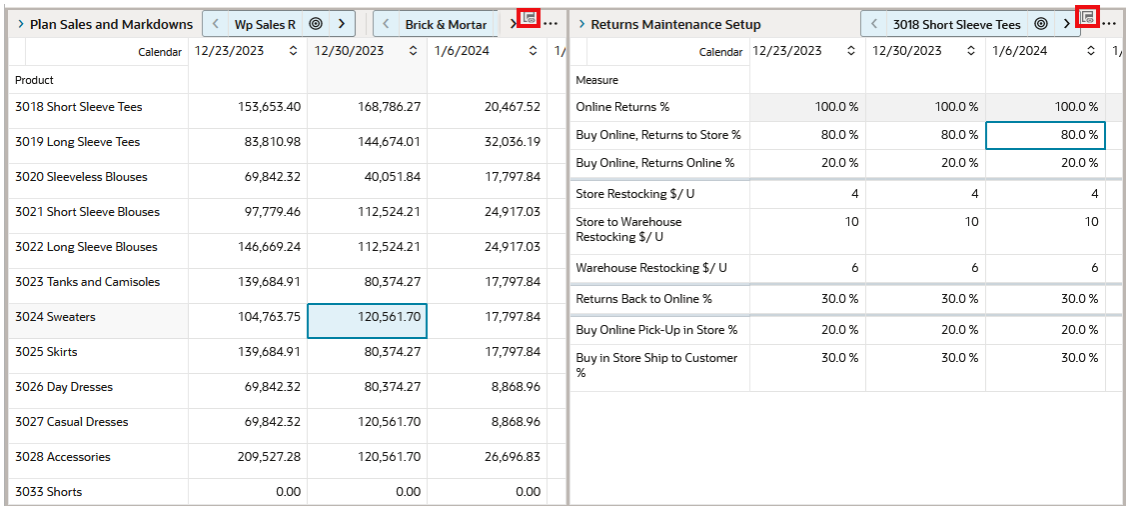
Figure 2-38 Z-axis Synchronized In the Collapsed Page Edge Area



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 **+** to add a new view, modify an existing view, or delete an existing view.

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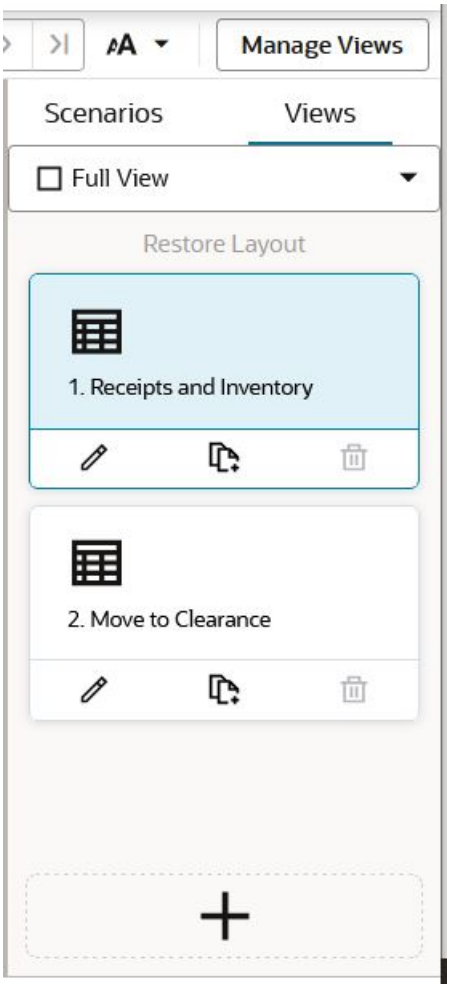
Figure 2-39 View Management Drawer



Action Tray

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

Examples of Application Actions include Seed, Refresh Fulfillment, Submit Plan, Approve Plan, Copy Approved Plan, and so on in MFPCS and Seed Sales, Calculate What-If, Flow Receipts, Approve Plan, and so on in APCS. Application Actions are highlighted in red in Figure 2-40 and Figure 2-41.

The System Actions include Calculate, and Commit. System Actions are highlighted in green in Figure 2-40 and Figure 2-41. As you can see, they are common across different applications, in this example across both MFPCS and APCS.

Figure 2-40 Example of Application Actions and System Actions in MFPCS

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Figure 2-41 Example of Application Actions and System Actions in APCS

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3
Reporting

Reporting tools are system that takes in raw data from various sources and convert it into knowledge. These tools provide reporting, decision making and business capabilities. These tools allow you to infer data in form of tables, charts, visual presentations. These tools help users to create, visualize various reports and then analyze data at any scale for any time period. There are various reporting tools which can help you analyze data across planning process at different levels such as **Retail Home**, **Dashboard**, **Data Visualization Cloud Services** and **charts in application**. Retail Home is all about having a comprehensive view of the health of your business across multiple applications. Dashboard provides you the reports in planning application which are important for you. Data Visualization helps you to combine various data and drill down to analyze various patterns. Charts views is all about the performance data which is available during planning process in the application.

Retail Home

Retail Home is a portal-type application for the RGBU enterprise. The user interface consists of a tile-based configurable dashboard that highlights important metrics and Key Performance Indicators (KPIs) across RGBU applications. It's one entry point to get in the system and a link to all the applications. You can surface any KPIs you want and look at KPI's that are on priority such as reviewing OTB. For example: As a planner, I start my day by logging in Retail Home. I can quickly take a look at the sales trends using RH tiles that give me a quick glance of the real time analysis. I can see the month to date sales metric against my plan and then act quickly to take action to meet my targets. I can directly log into the Assortment Planning application from the Retail Home dashboard and make required changes. As a financial planner, I start my day by logging in Retail Home. MFPCS tiles in the RH dashboard give me a quick snapshot of the BOP inventory against the receipt. Based on the KPI trend, I can act quickly and make changes to plan. For more details on Retail Home, refer to the *Oracle Retail Home User Guide*. For more details on Retail Home configuration, refer to the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

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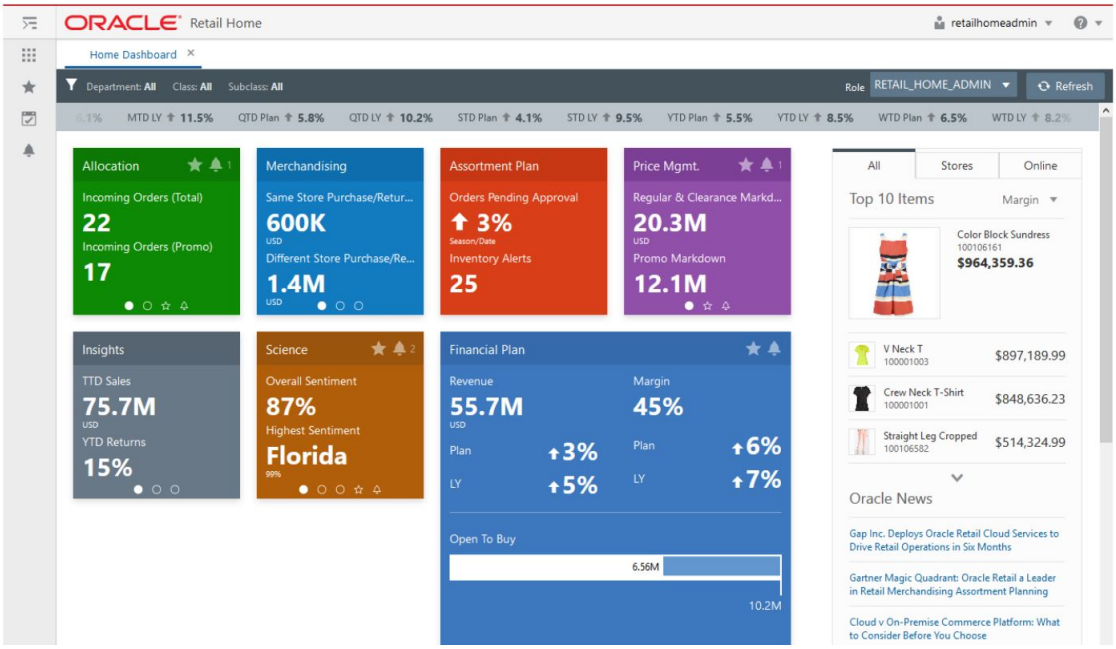
Figure 3-1 Retail Home Dashboard



RPASCE Dashboard

RPASCE Dashboard is the central page providing a great snapshot of business as well as notifying alerts. It can be used for data analysis and examine the data for various profiles. The dashboard can be used to open your most recently used workspaces with a single click.

For example: I am a buyer and it is Monday morning. My manager wants me to give a review of the past week's performance in two hours. I can use the dashboard as my starting point of where I want to start. I see a visual graph to help me quickly see how my business performed. I navigate to the dashboard tiles to see different KPIs that will give me a quick snapshot of sales units, sales retail, margin, sell-through. From there, I can move to trend analysis (in-season item planning Assortment Planning) and work on my Monday morning reporting and ensure that there is enough inventory for my strong sellers and create exit strategy such as promotions and markdowns for slow movers. As a buyer, I'm working on my in-season plans. My sales team is upset that we do not have enough inventory in the stores. Our customers have suddenly started buying more casual clothing since the pandemic. I need to quickly identify the styles that are running out of stock and work with supply chain to replenish them. I log into the Assortment Planning dashboard and view alerts. The alert navigation quickly takes me to all of the sell through warnings and identify all my styles that need to be replenished immediately.

For more details on the Dashboard, refer to the *Oracle Retail Predictive Application Server Cloud Edition User Guide, Chapter 3 – Dashboard*.

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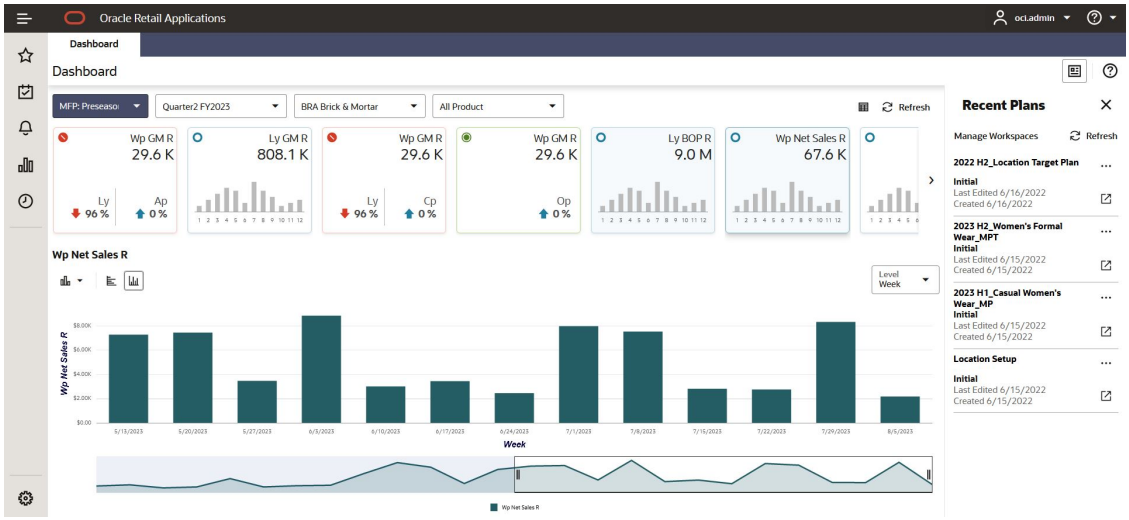
Figure 3-2 RPASCE Dashboard



Data Visualization Cloud Services

Oracle Data Visualization Cloud Service is a web-based tool that enables you to visually explore analytical data to get instant clarity. It is an easy-to-use tool that provides a self-service option to create reports and dashboards. It allows the planner to review the information in graphical form. With DV, you can drag and drop data to see your data visualized automatically. Benefits of Data Visualization Cloud Service:

- Rich insights using data that spans multiple applications including planning, Retail Insights, and Retail Science (access depends on what is included with your subscription).
- Inclusion of high value data in analysis such as customer segments.
- Rapid extension of analysis and strategic decision making without requiring extension of the planning solution.
- Executive and cross-functional role visibility to planning data.

For example: I am planner and I need to provide an overall sale, revenue and inventory report across products and location for a review with management team. I can log in to DV and combine sales, revenue and inventory data across product location and then generate reports to analyze the business.

I am a VP for buying. We are launching our new clothing range and I need to work with my marketing teams in creating an effective marketing campaign. Marketing wants to know where my target customers live so that they can identify areas where to put billboards. I log in to DV to see where my customer (age/gender) lives in each city and by zip code. I can easily see it visually on a map and I tell the marketing team where exactly we want to advertise more to create awareness and spend our marketing budget.

I am buyer for women's category, and I am going to start working on my assortment plan for next season. Before I start creating the plan, I want to look at the previous two seasons product performance and understand the trend of sales across locations. I can log in to DV and pull the sales data for generating reports. I can easily create visual charts which gives me clarity on the sales of product across location and product sold with discounts. This will help me plan the right product mix for right location.

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I am planner and as I start to work on my plans, I need to check the sales trend with other categories across organization. I can log in to DV and take a quick look at the bottoms sales and analyze the trend to plan for shirts assortments and make right combinations.

You can view example reports of Sales/Margin and Inventory to get the initial view on the DV report. Import these two reports in the DV tool for reference:

- MFP Sales Test report.dva
- MFP inventory report.dva

Access these two DV reports from the Oracle Retail Predictive Application Server (RPAS) Cloud for Planning and Optimization / Supply Chain Cloud Services Documentation Library (**Doc ID 2492295.1**) located on My Oracle Support. For more details on creating reports or importing reports, refer to *Visualize Data within Oracle Analytics Cloud*.

For more details on the Data Visualization Set Up, refer to the *Oracle Retail Predictive Application Server Cloud Edition Administrator Guide*. For more details on the Data Visualization Configuration Set up, refer to the *Oracle Retail Predictive Application Server Cloud Edition Configuration Tool Guide*.

Launch DV Reports from the Planning Application

You can also link Data Visualization Reports to the Planning application. This enables you to launch DV reports directly from the Planning application into a separate browser tab. For more details on linking DV reports with the Planning application, refer to the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Launch into Planning Application from DV Reports

You can also launch into the Planning application from Data Visualization (DV) reports. This helps you to quickly data updated on the planning workspaces. The reports are linked with workspace templates by SI / tech user using the configuration. For more details on how to link planning workspace to DV reports, refer to the document *Visualize Data within Oracle Analytics Cloud* on My Oracle Support.

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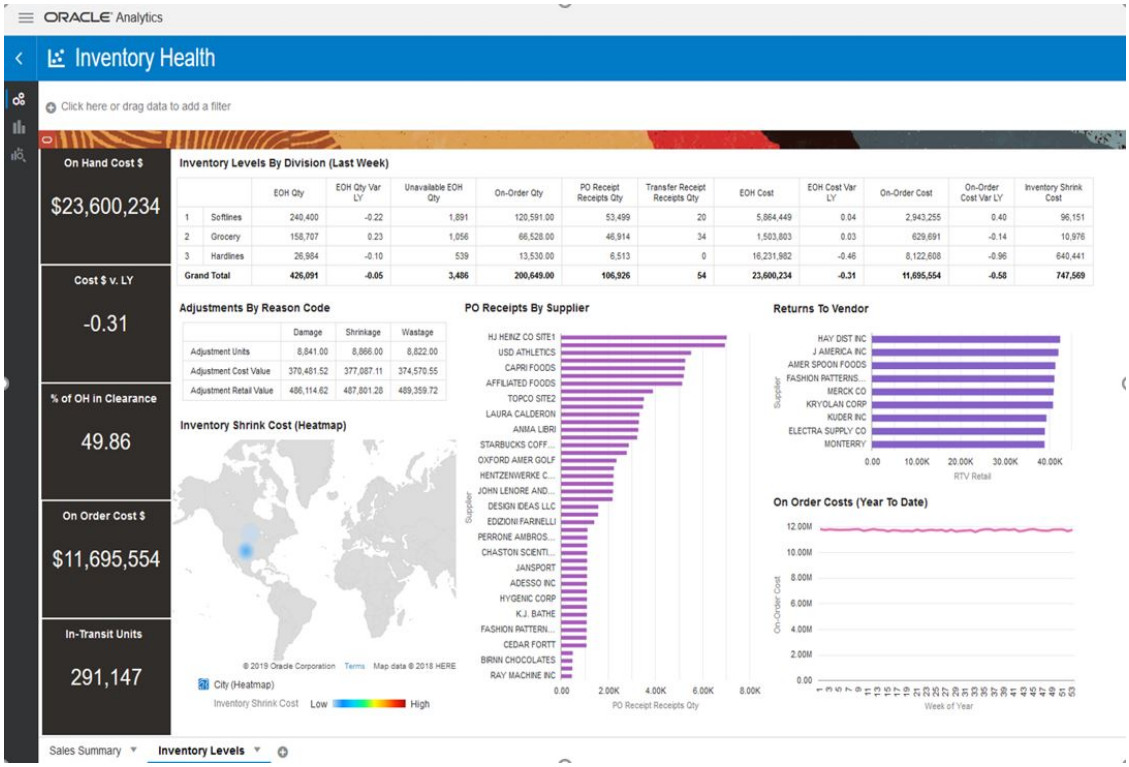
Figure 3-3 Data Visualization



Charts

RPASCE Charts use the charting feature to generate a visual representation of the data in the form of charts. You can: .

- Quickly pull the data and do an immediate analysis
- Create charts in multiple views option to analyze data side by side
- Edit the data in charts form for quick decision making

For Example: I’m a buyer and I have not even started planning yet. I want to quickly see the LY performance to gain insight about which product category has an opportunity to grow. I quickly log into Assortment Planning and go to Review history. There is too much data and it is hard for me to quickly identify the opportunities. I create a visual chart and view it side by side with my LY review report. I quickly find out that knit tops are a big opportunity for my business. I decide that I will need to talk to my design team in advance to create more designs for knits for the next line architecture meeting.

I am a planner, and I am working on my financial plan for next season. I need to take a quick a look at variance of sales against last year / forecast and make changes to my data to meet the target. I can view my data in chart and make quick edits right from the charts.

For more details on Dashboard, refer to *Oracle Retail Predictive Application Server Cloud Edition User Guide, Chapter 9 – Charts*.

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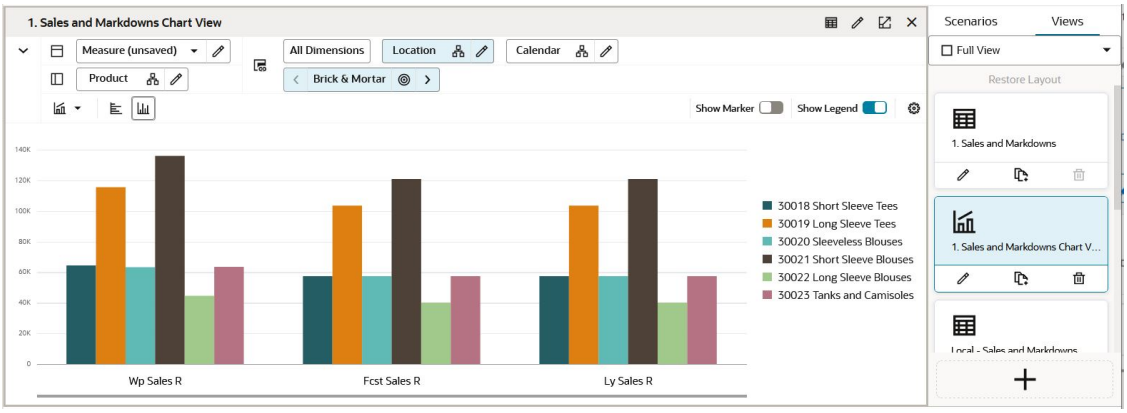
Figure 3-4 RPASCE Charts



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4

Dashboards

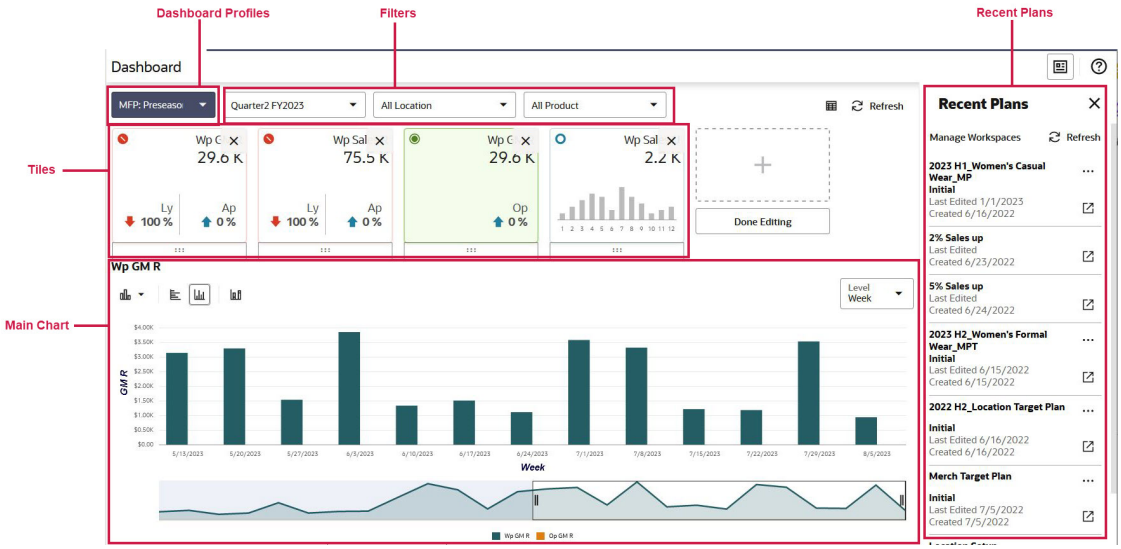
The RPASCE Dashboard is the central page of any RPASCE based product. It is the first page that you see after logging into the application. It can be used to locate issues that need attention. It can also be used for data analysis, allowing you to examine your data at any scale and for any time frame.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

The dashboard must be refreshed periodically, as new products, locations, and so on, are added. This typically occurs weekly, but the frequency depends on the settings of the RPASCE 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.

The following figure highlights the different sections in the dashboard.

Figure 4-1 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.

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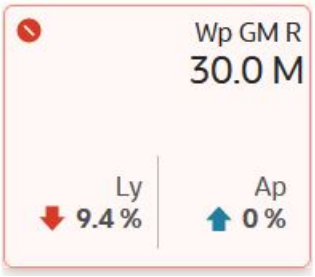
Figure 4-2 Example Metric Variance Tile



There are several styles of metric tiles. Figure 4-2 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.

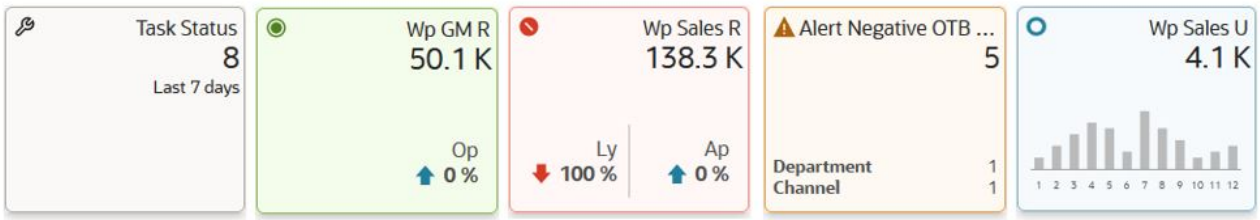
Every tile has certain common characteristics. For example,

- Value. In Figure 4-2, Wp GM R is the title.
- An aggregate quantity. In Figure 4-2, 9.4% and 0%. 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 displays next to the title in the chart area. Clicking the information badge shows information on the configured thresholds.

  In Figure 4-3, Wp GM R is shown in a red octagon (indicating a problem) because the working plan value is 0% below the Last Year value. The grey tile is used for administrative information.

Figure 4-3 Tiles Showing Color State and Icon



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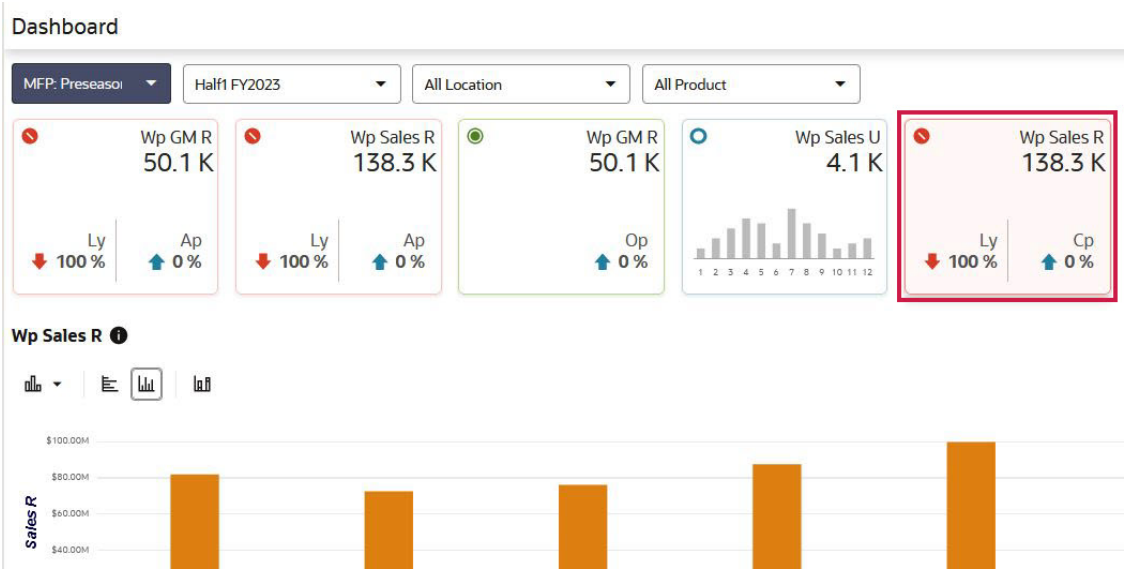
As shown in Figure 4-4, the tile with color indicates that this measure is displayed in the chart area in more detail. Clicking on a different tile refreshes the data in the chart area and displays the tile in color.

Figure 4-4 Selecting a Tile

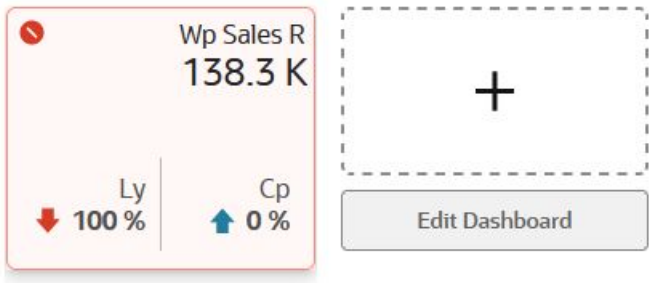


Metric tiles must represent the basic quantities that are used to indicate the health of your business. An implementer can create new metric tiles, modify existing ones, or delete tiles entirely.

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 4-5 Add New Tile



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

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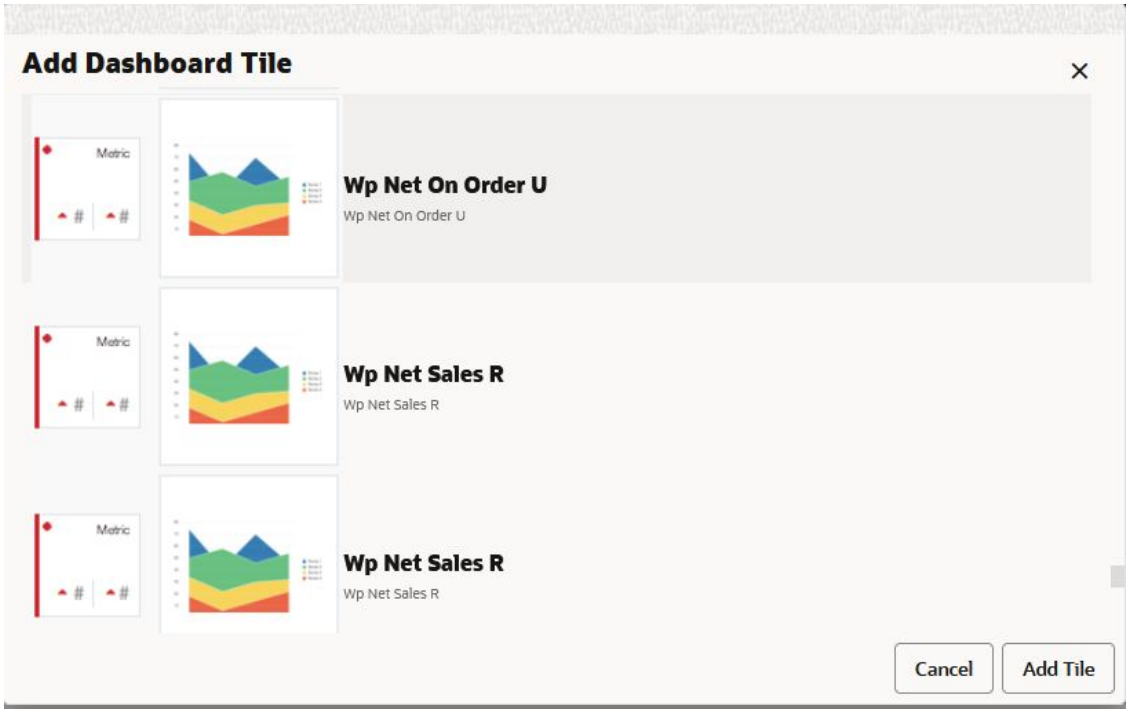
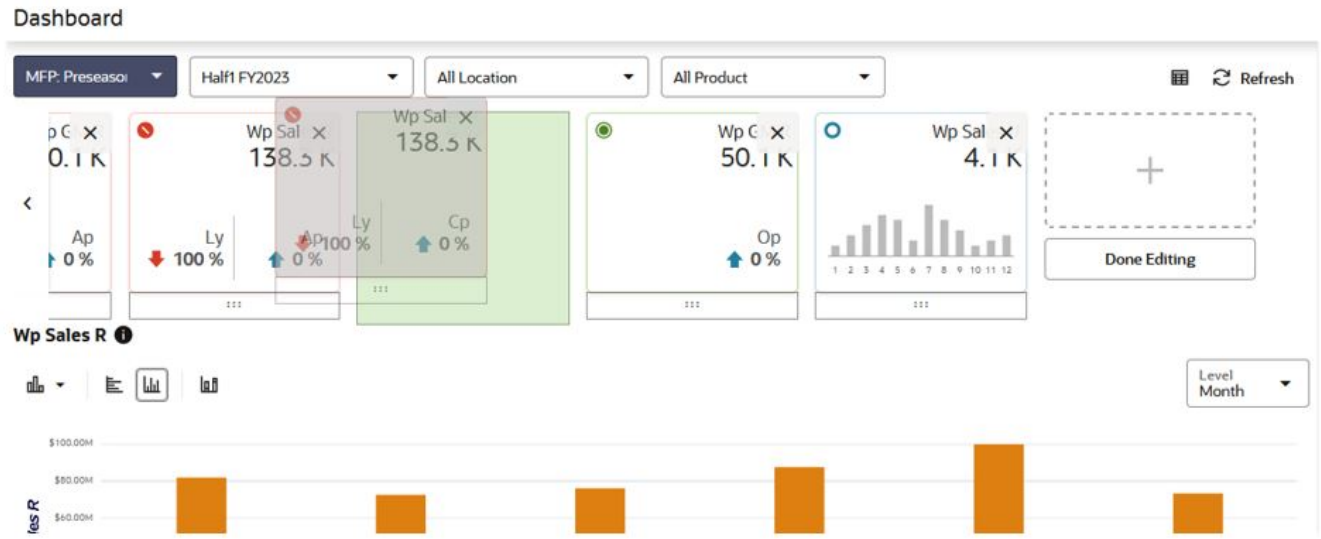
Figure 4-6 Available Metric Tiles



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 4-7 Changing the Display Order



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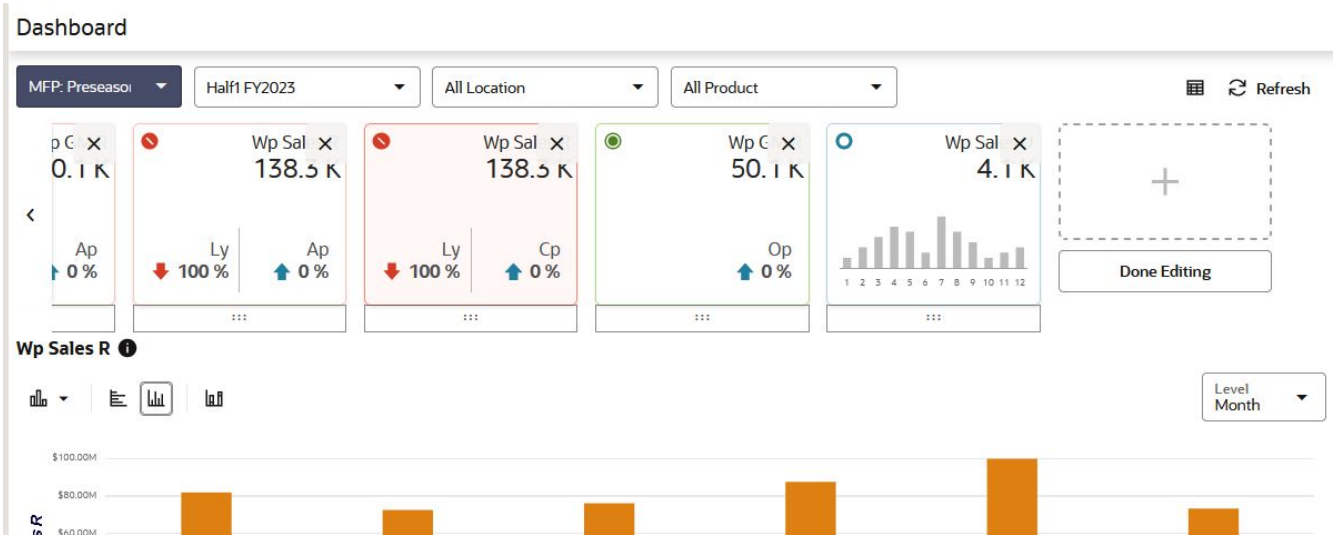
Removing a Tile

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

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

Figure 4-8 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 you use zoom on the main chart or scroll through it, it might extend beyond the scope of the top filter and RPASCE displays this message, *Dashboard chart is out of sync with Calendar filter*. 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 to 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.

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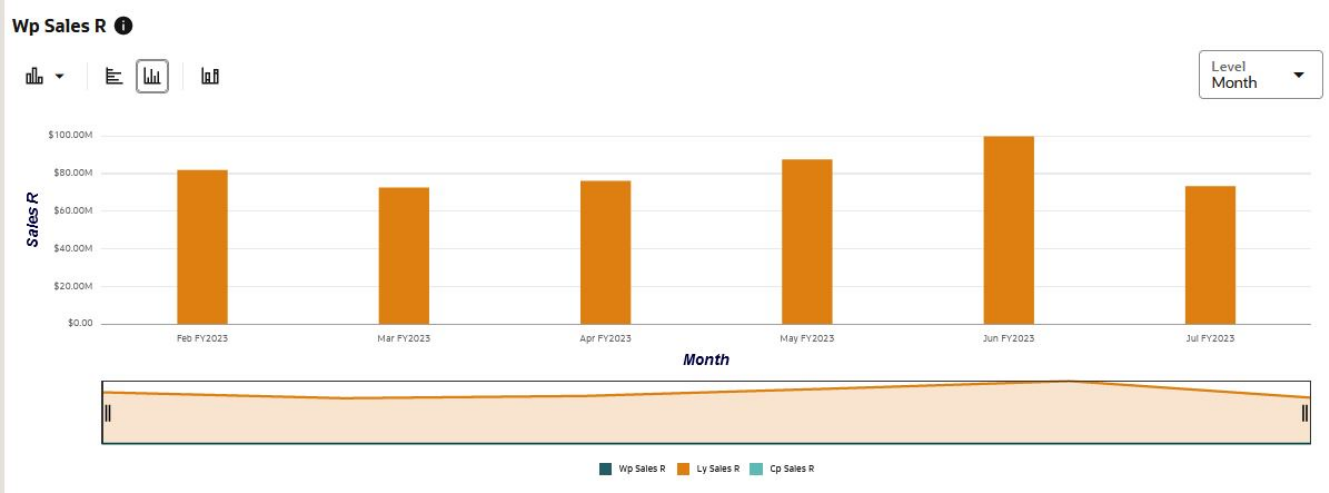
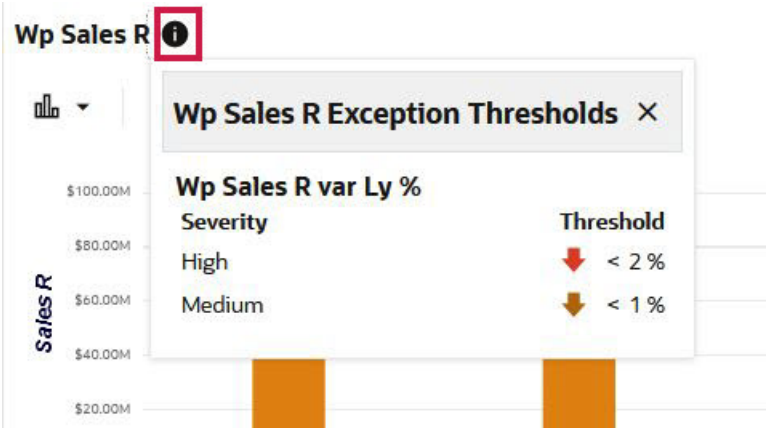
Figure 4-9 Main Chart



Information Badge

The metric information badge on the dashboard is available next to the metric name. Click the Information icon, as shown in Figure 4-10, 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 4-10 Information 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.

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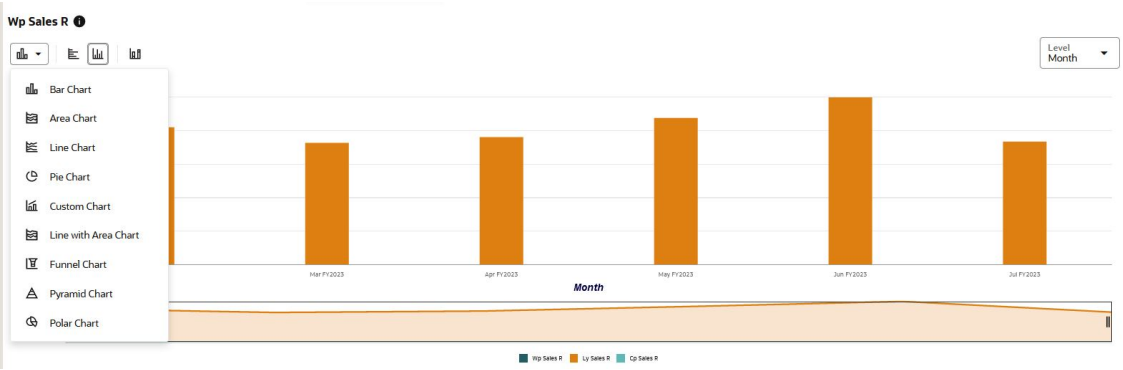
Figure 4-11 Modifying the Chart Type



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 4-12 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.

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Figure 4-13 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. You can collapse or expand the recent plans list by using the Recent Plans icon. The **Recent Plans** icon provides more space to view the chart and assist in reviewing the dashboard.

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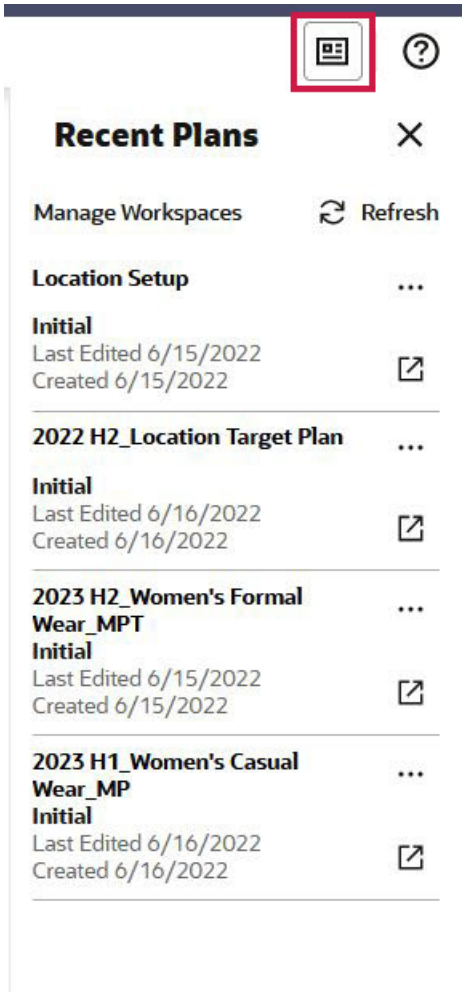
Figure 4-14 Recent Plans



By clicking the **Action Menu** icon next to each plan, you can perform the following actions:

- **Edit** - opens the wizard for the corresponding workspace for you to make edits in the position selection
- **Build** - initiates the building process for the corresponding workspace
- **Rename** - renames the corresponding workspace
- **Delete Workspace** - only deletes the workspace and retains the segment which allows you to save the selections made during wizard selection
- **Delete** - deletes the corresponding segment

Recent Plans displays the **Last Edited** and **Created** dates for the workspace. The **Last Edited** date is the last modified date of the workbook and the **Created** date is the date when the workbook was created. 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.

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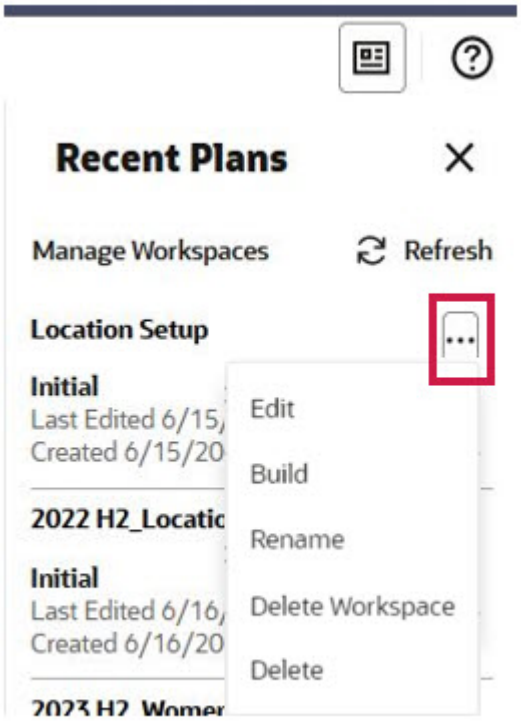
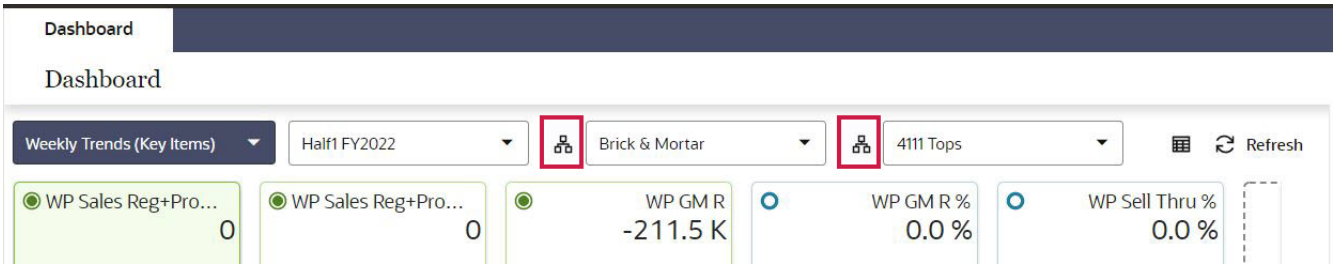
Figure 4-15 Recent Plans Action Menu



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 4-16 Dynamic Hierarchy Roll Up



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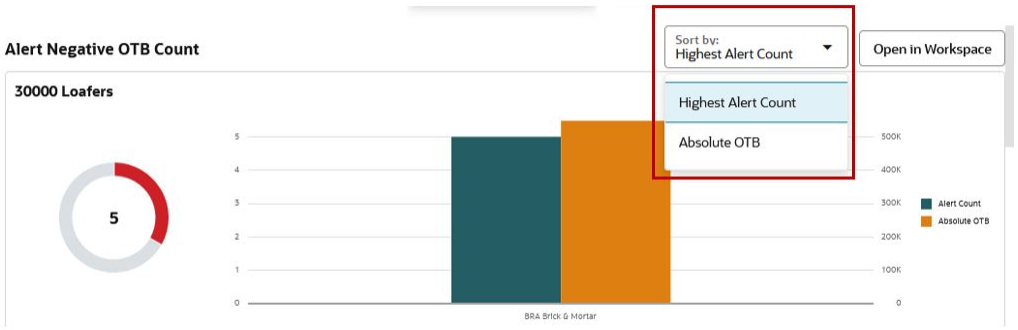
Sort on Dashboard

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.

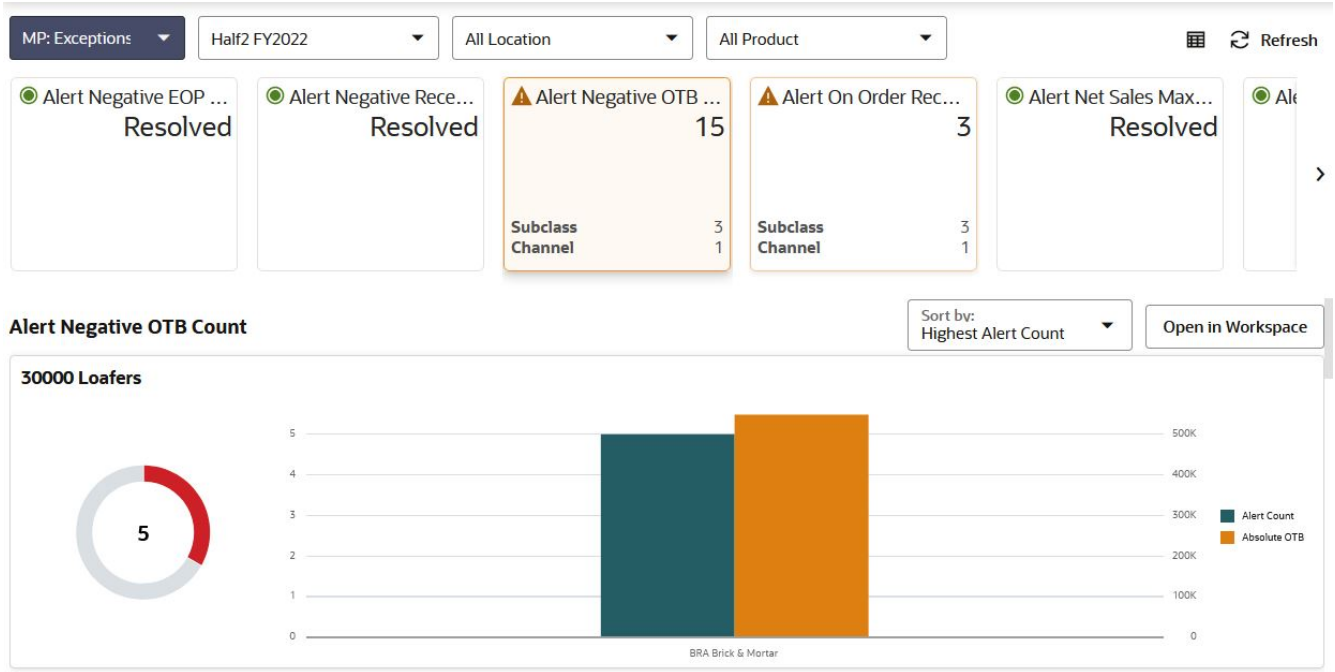
Figure 4-17 Sort on Dashboard



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 4-18 Exception Dashboard



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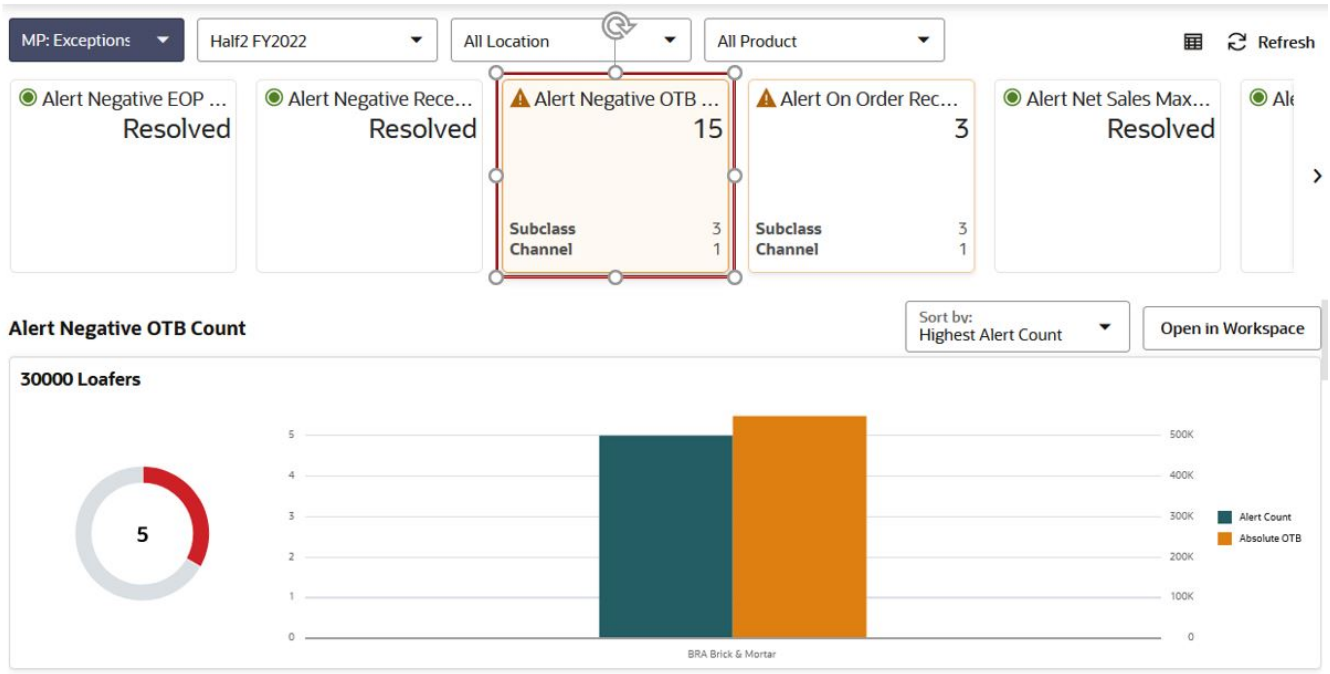
Exception tiles provide a summary of how many exceptional conditions exist within the plans you created and provide secondary information describing roughly the distribution of the exceptions across the data segments.

As shown in Figure 4-19, the selected tile has a total of 15 exceptions at three 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 4-19 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.

As shown in Figure 4-20, the selected alert has total five exceptions for three sub-classes across location. You can see in the detail section graph for Alert Count by Location with legend as the subclass.

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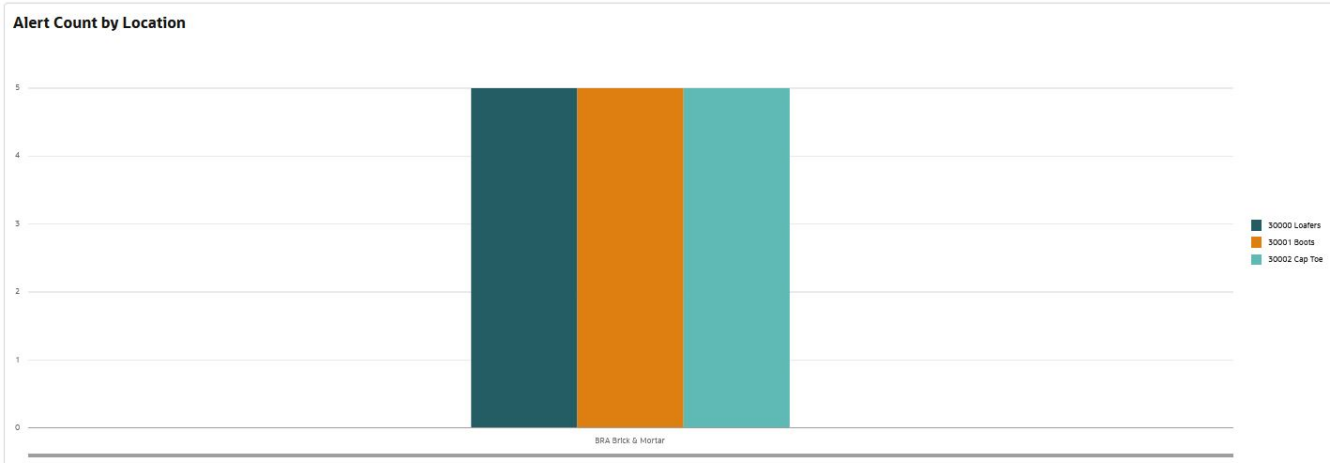
Figure 4-20 Exception Summary Example



You can resolve the exceptions by launching directly into the respective workbook. Figure 4-21 shows the example workbook with alerts highlighted. When all the exceptions are resolved, you will see the notification message on the Exception Dashboard. Figure 4-22 shows the example of the notification message.

Figure 4-21 Resolve Exceptions

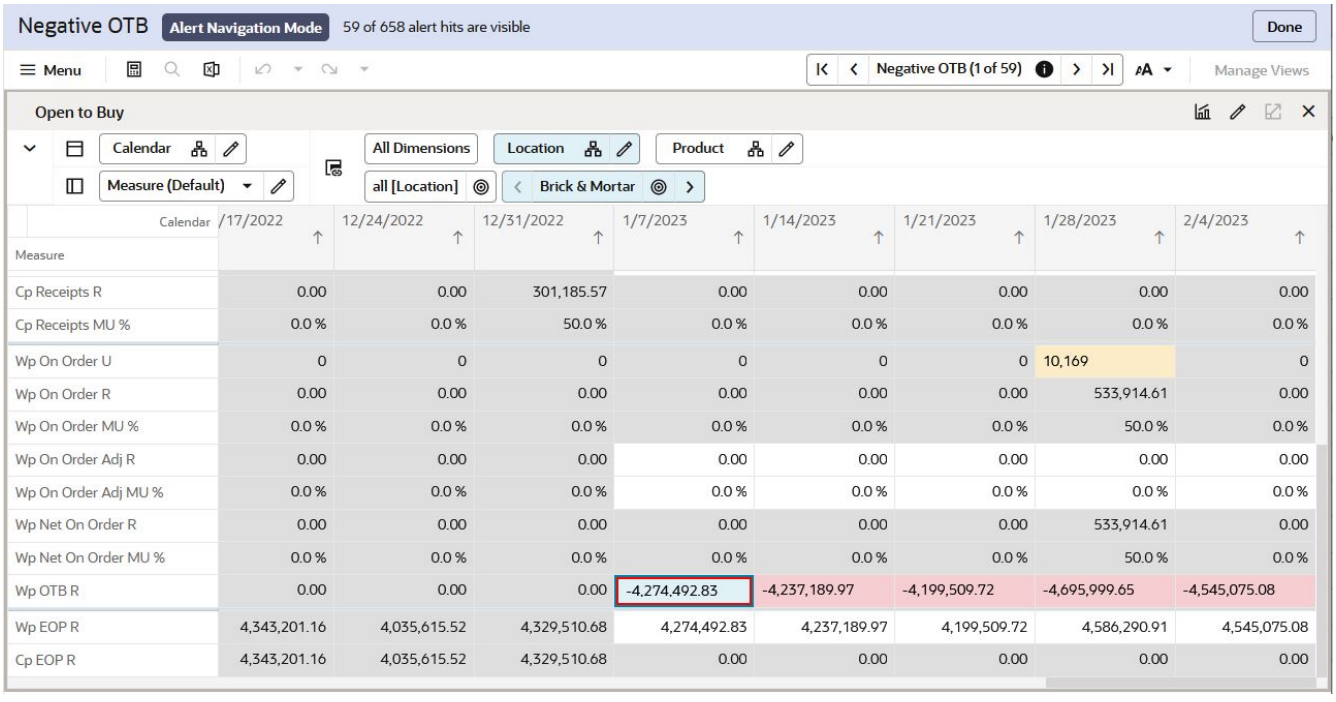


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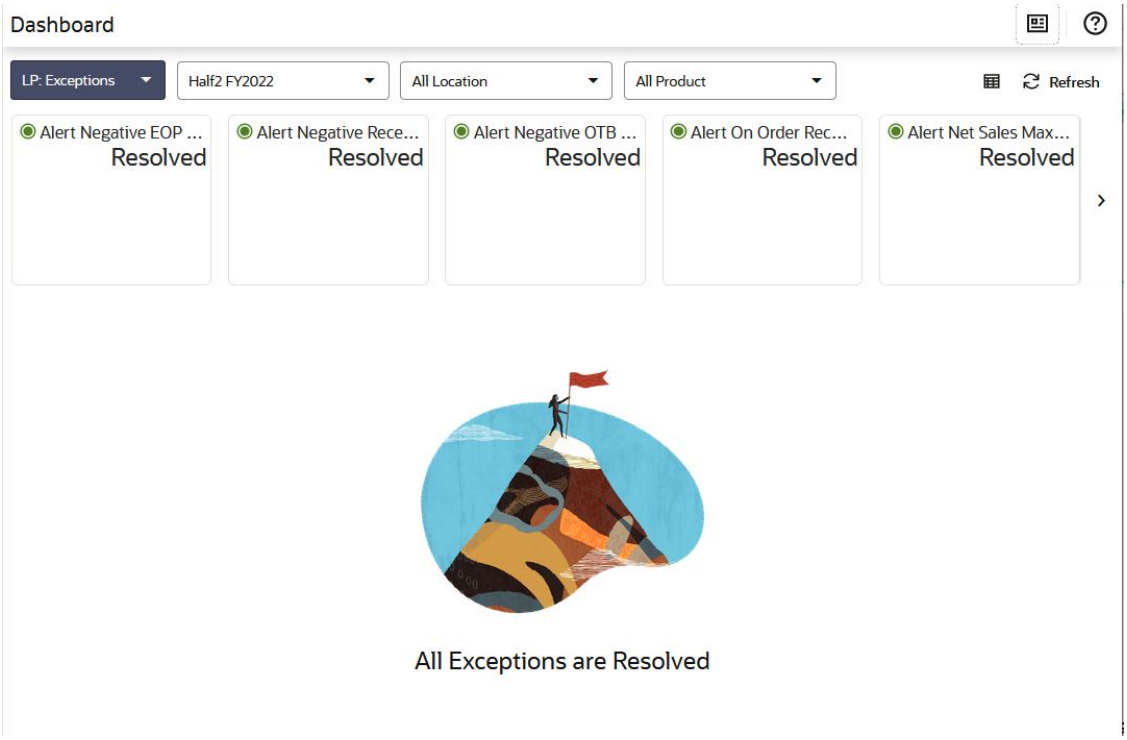
Figure 4-22 All Exceptions Resolved Message



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 window. 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.

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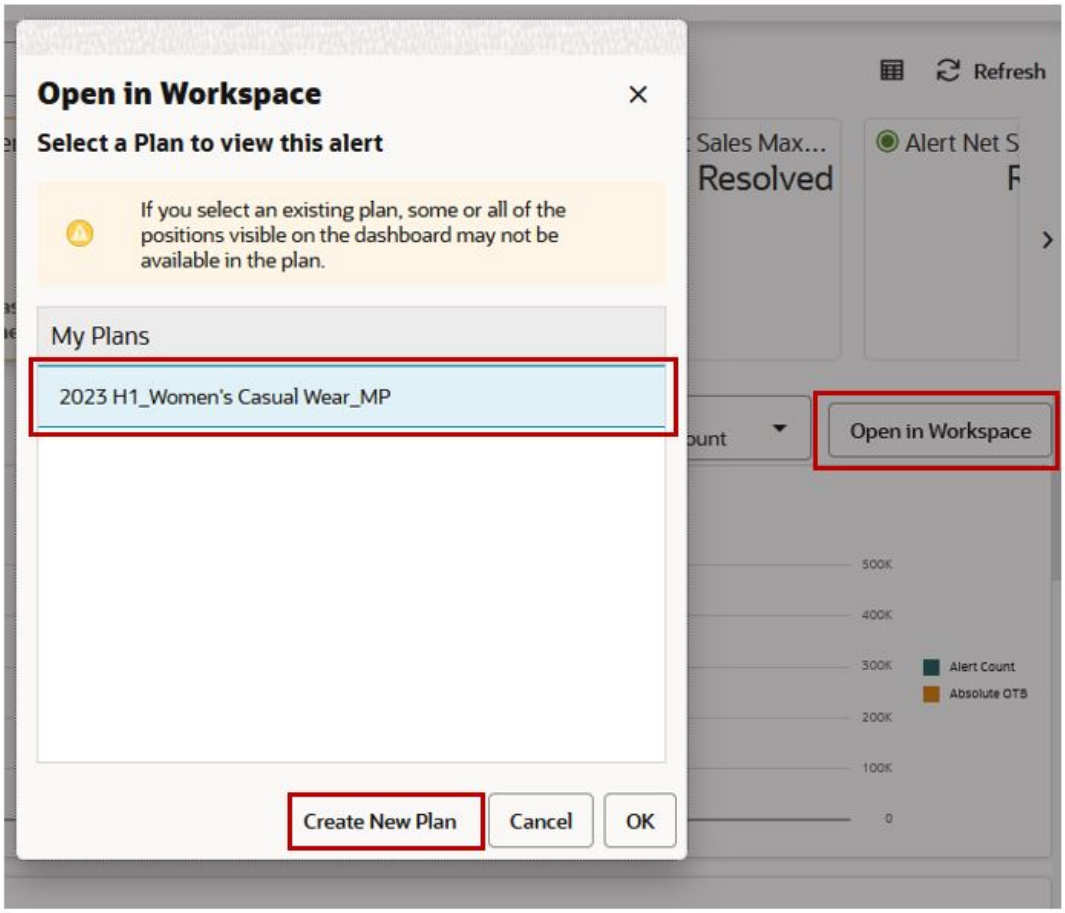
Figure 4-23 Create or Open Workspace



- 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 window. 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 Real Time Alerts 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.
- A location bar in the top charts, the selected product and location will override the selection in the filters.
- The background of the top chart, the product will override the selection in the product filter.
- A bar on the last or overview chart, the selected product and location will override the selection in the filters.

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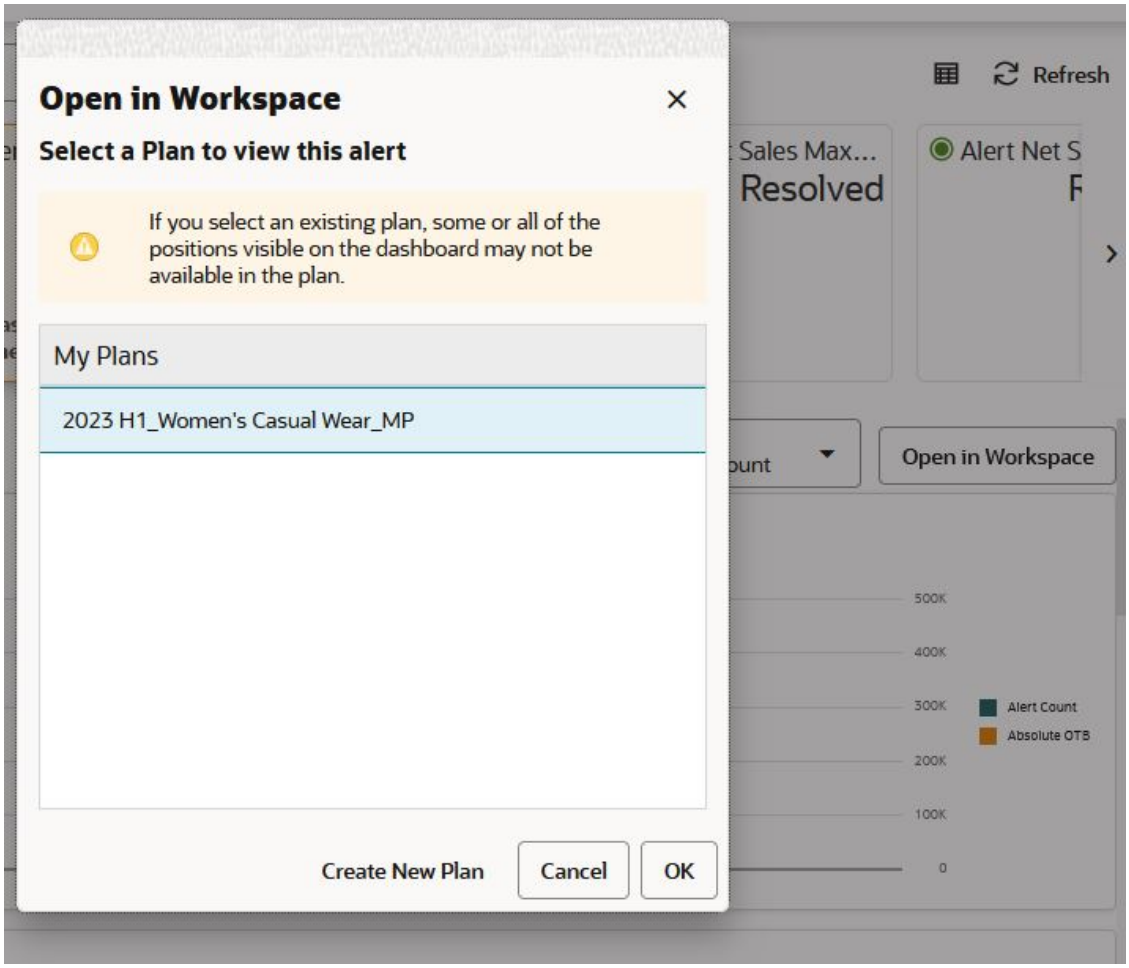
Figure 4-24 Create and Open in Workspace (Contextual Action)



Administrative Dashboard for Non-Administrative Users

You can view the status of tasks initiated by you on the Administrative dashboard. The Administrative dashboard can be accessed using the Profile drop-down that is located on top of the tiles. This assists you in tracking the status of tasks like workbook build, commit, and so on.

The Administrative dashboard provides following actions:

- **Refresh Table**: Refreshes the status of tasks.
- **Detach**: Enlarges the table view.
- **Auto-refresh**: Toggle that enables or cancels automatic refresh for the table.
- **Download Log**: Downloads logs selected tasks.
- **Watch Live Log**: Allows you to watch live logs for selected tasks.
- **Cancel Task**: Cancels any task performed by you.
- **Re-run Task**: Restarts the cancelled task.

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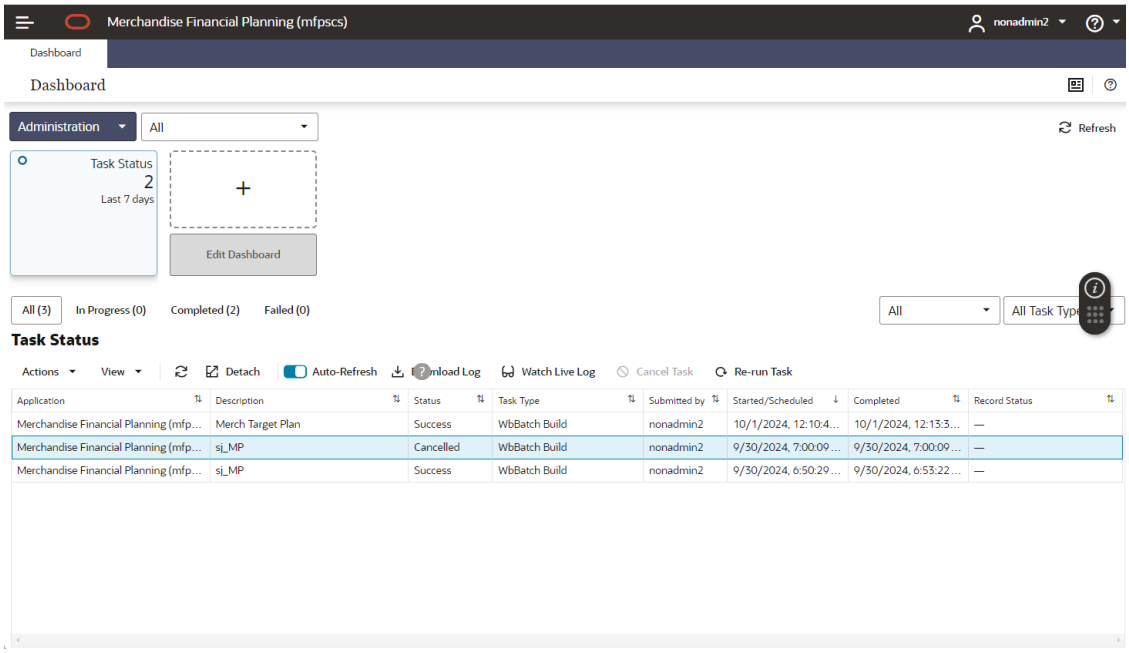
Figure 4-25 Administrative Dashboard for Non-Administrative User



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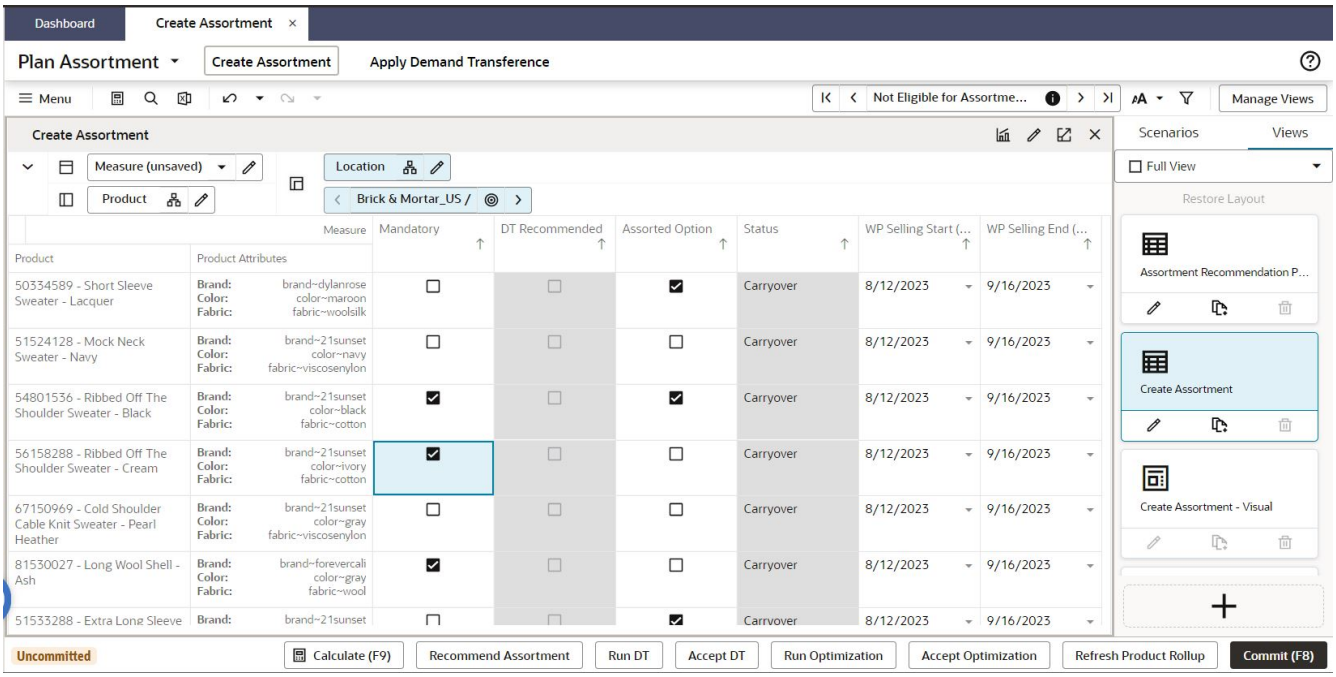
5
Workspaces

When you use an RPASCE solution, you can interact with the solution through a personal data repository called a workspace. A workspace contains a segment of the data (and metadata) from the domain, and its scope is constrained by the access rights available to you. Workspaces are stored on the RPASCE server and can be built using an online wizard process or using 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 5-1 Pivot Table



Sorting and Filtering

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

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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.

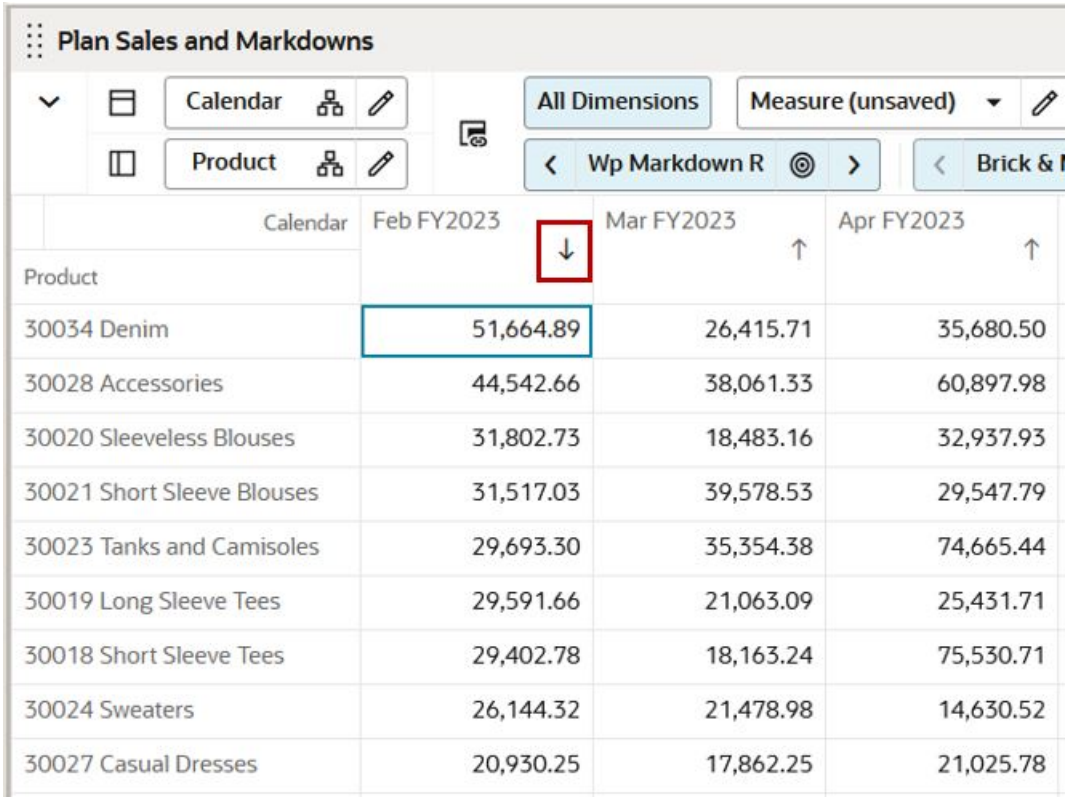
The sorting occurs along a single measure, using only a single level in the sort. The sorting is limited to the current view, so you can see the same data sorted differently in different views. Sorting is only available in the pivot table, not the graph view.

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. The sort arrow is located to the left of the column header.

Figure 5-2 Sort by Column Heading



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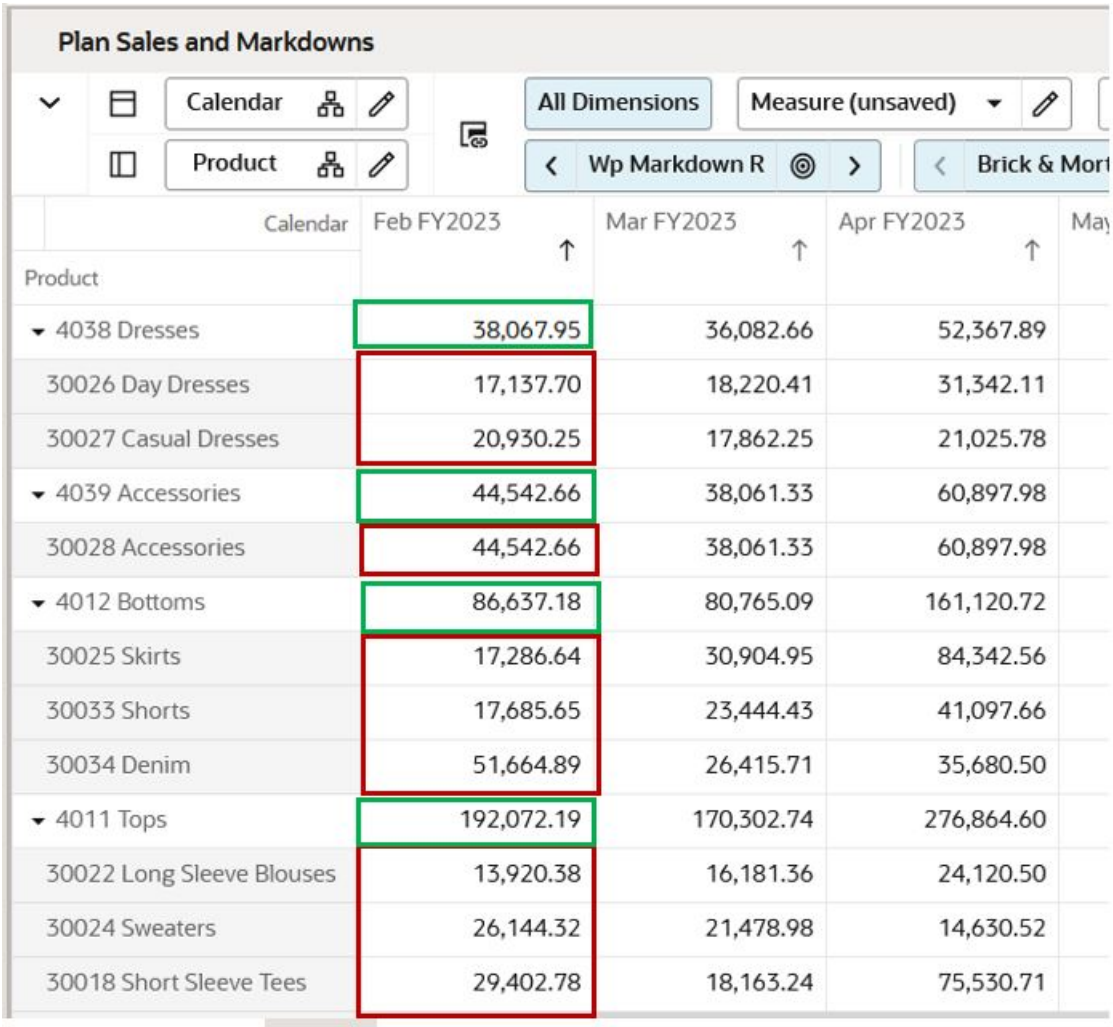
Once you click the sort arrow, the selected positions are sorted according to the measure's values in the selected slice. The arrow sorts in ascending order the first time you click it, then in descending order on the next click; it switches back and forth for each new click. The arrow displayed in the 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 5-3 Sort by Ascending Order



Product	Feb FY2023	Mar FY2023	Apr FY2023	May
4038 Dresses	38,067.95	36,082.66	52,367.89	
30026 Day Dresses	17,137.70	18,220.41	31,342.11	
30027 Casual Dresses	20,930.25	17,862.25	21,025.78	
4039 Accessories	44,542.66	38,061.33	60,897.98	
30028 Accessories	44,542.66	38,061.33	60,897.98	
4012 Bottoms	86,637.18	80,765.09	161,120.72	
30025 Skirts	17,286.64	30,904.95	84,342.56	
30033 Shorts	17,685.65	23,444.43	41,097.66	
30034 Denim	51,664.89	26,415.71	35,680.50	
4011 Tops	192,072.19	170,302.74	276,864.60	
30022 Long Sleeve Blouses	13,920.38	16,181.36	24,120.50	
30024 Sweaters	26,144.32	21,478.98	14,630.52	
30018 Short Sleeve Tees	29,402.78	18,163.24	75,530.71	

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.

> **Note**
>
> The sort function is not supported when there are two dimensions available on the x-axis. For example, Calendar and Location dimensions are placed on the x-axis.

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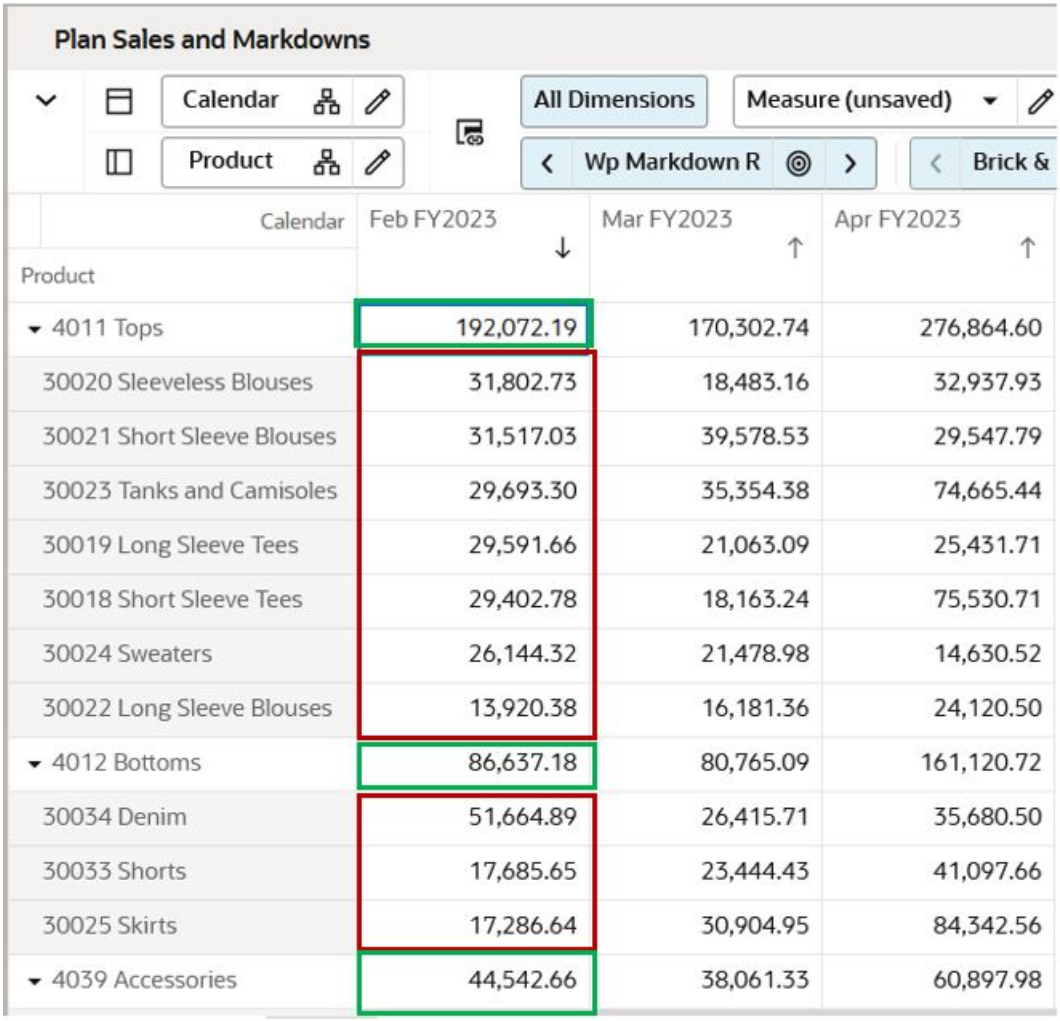
Figure 5-4 Sort by Descending Order



> **Note**
>
> You can sort the list of items in the SHS picklist measure and the Picklist measure drop-down list using the OAT task. For more details, refer to the *Oracle Retail Predictive Application Server Administration Guide*.

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 using Edit View.

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Figure 5-5 Before Clear Sort

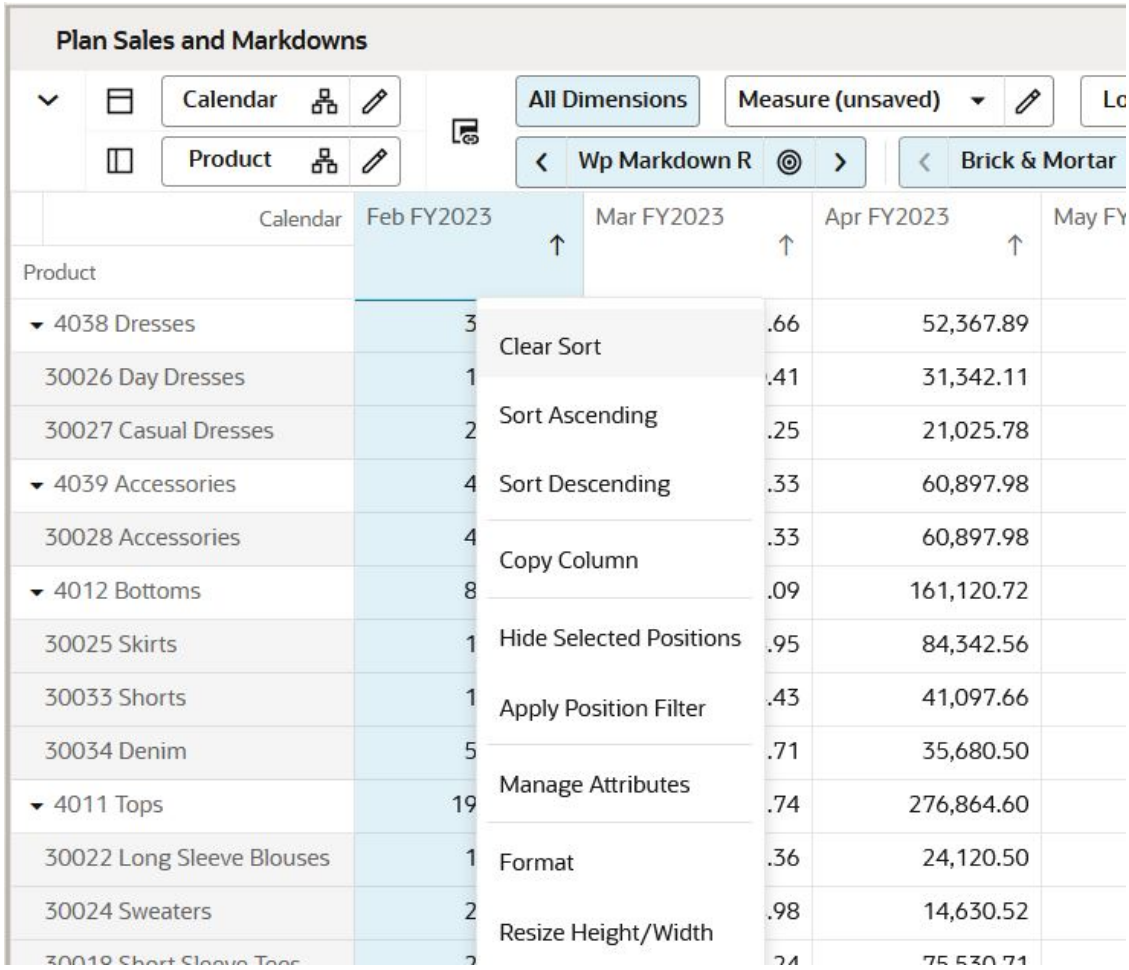

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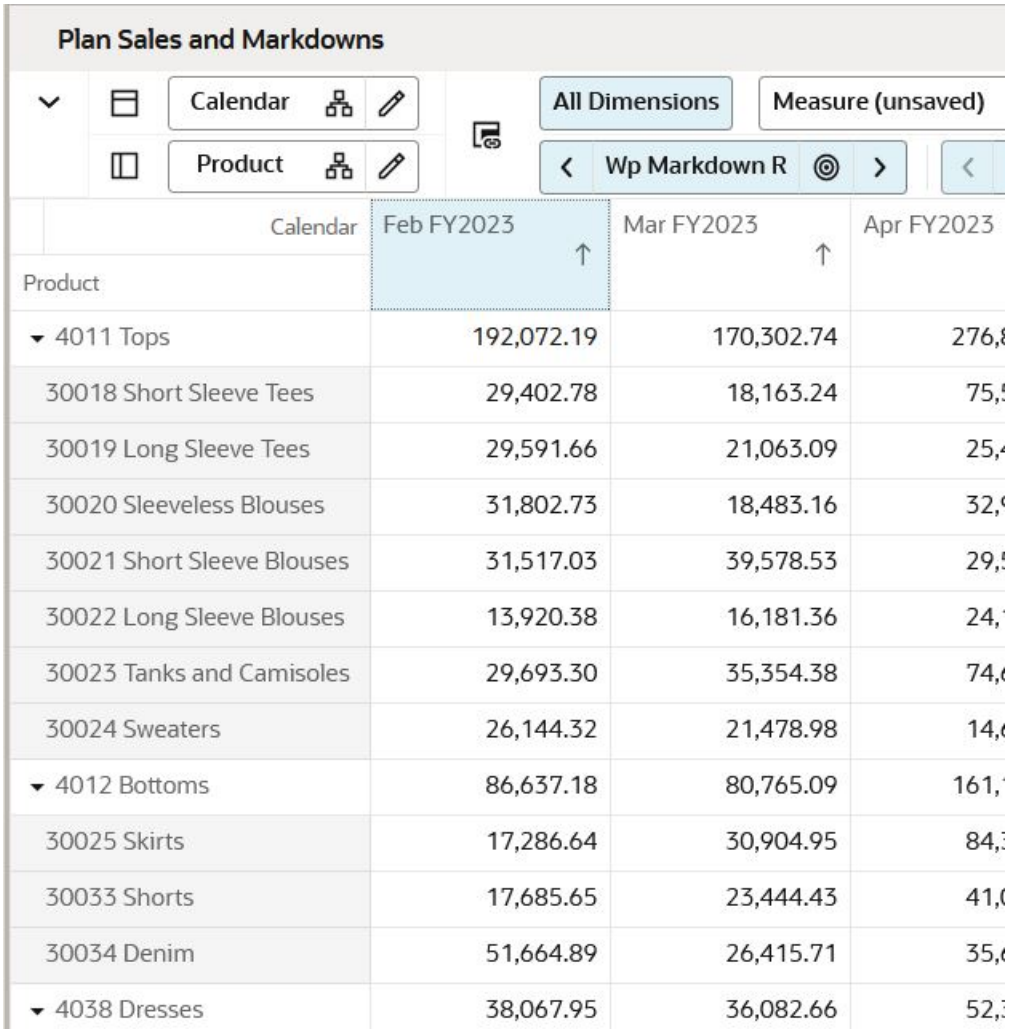
Figure 5-6 After Clear Sort



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.

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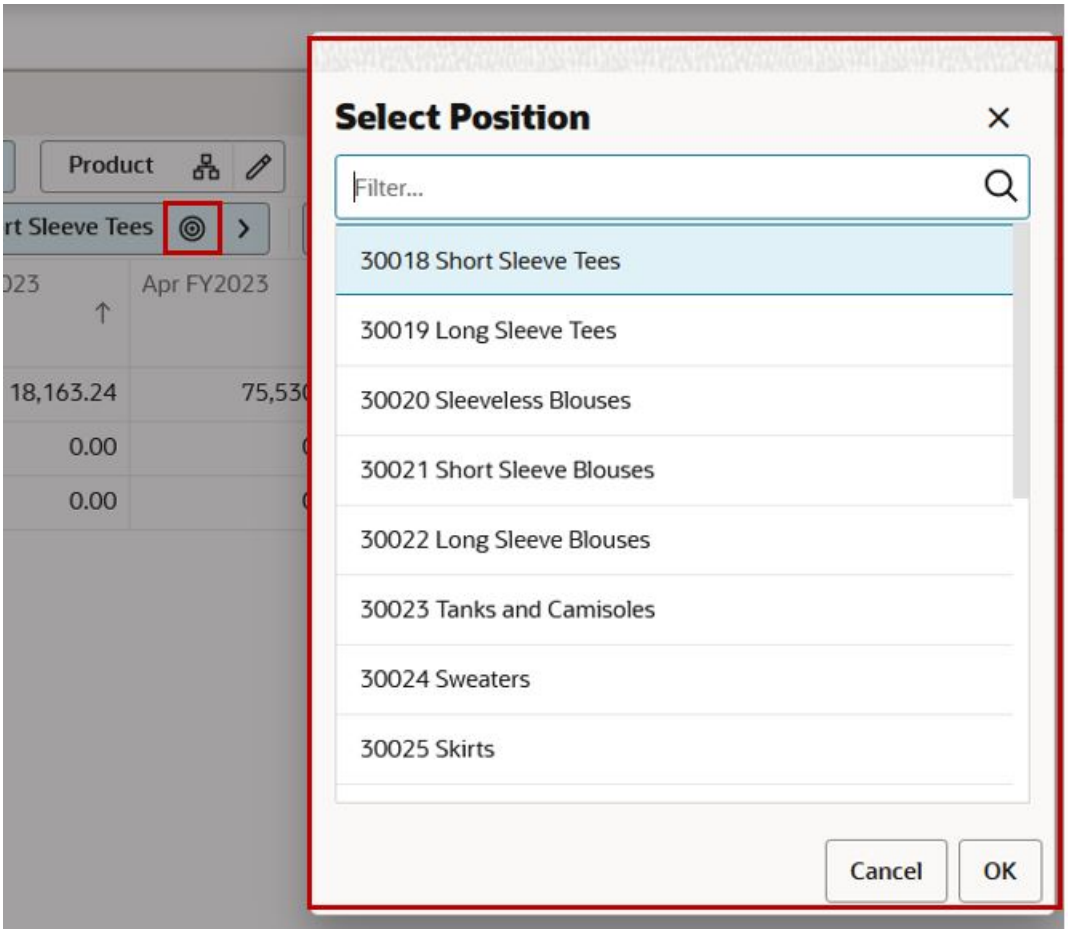
Figure 5-7 Active Dimension (Product)



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 5-8 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 5-9, the Product dimension is selected to make it active; the

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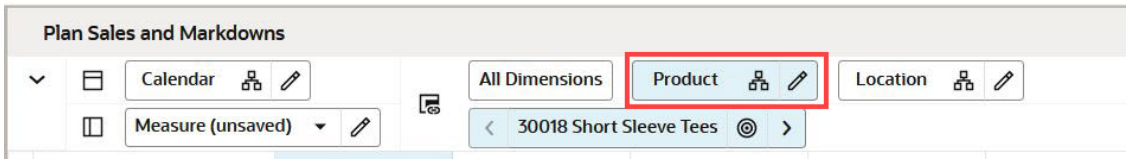
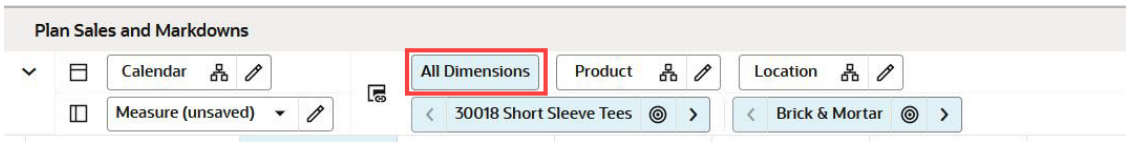
current product position is displayed. Click **Next** to advance to the next product; the location position will not change.

Figure 5-9 Select Product on Z-axis



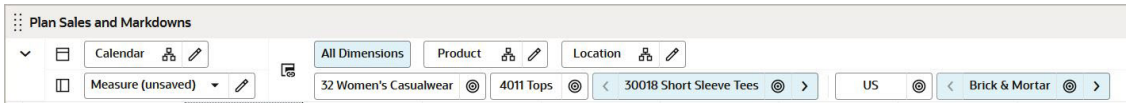
When you open a workspace, the **All Dimensions** button is selected by default, as shown in Figure 5-10.

Figure 5-10 All Dimensions Active



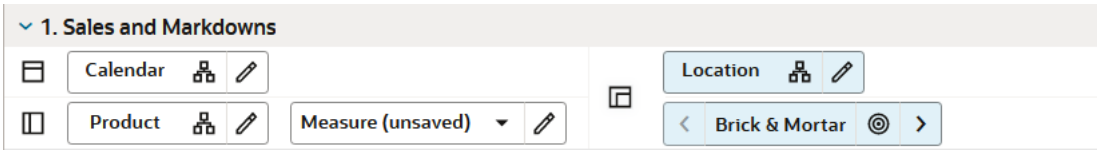
If you select multiple levels of the dimension, all the selected levels for all the dimensions on the *z*-axis will be visible, as shown in Figure 5-11. You can differentiate the lowest level tile for each dimension.

Figure 5-11 All Dimensions Active: Multiple Levels Selected



If you select any other dimension of the *z*-axis, the **All Dimensions** button becomes unavailable. If there are no dimensions or only one dimension on the *z*-axis, then the **All Dimensions** button is not visible, as shown in Figure 5-12.

Figure 5-12 No Multiple Levels on Z-axis: All Dimensions Button is Unavailable



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.

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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:

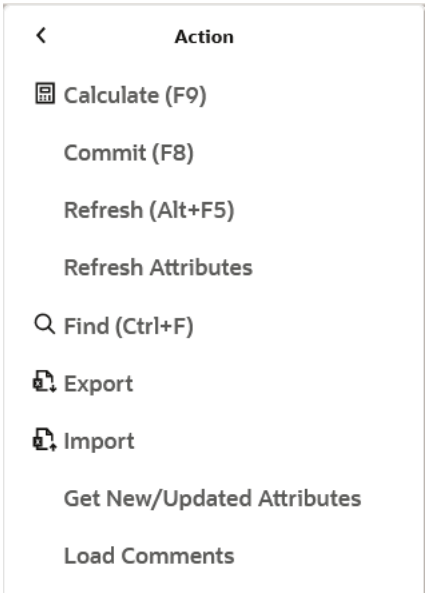
- The Find option in the Edit sub-menu of the Quick Access Toolbar menu
- The shortcut Ctrl + F from a selected pivot table cell
- The Find button on the Quick Access Toolbar

Using Find with the Quick Access Toolbar Menu

To use Find with the Quick Access Toolbar menu:

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

Figure 5-13 Using Find with the Quick Access Toolbar Menu



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

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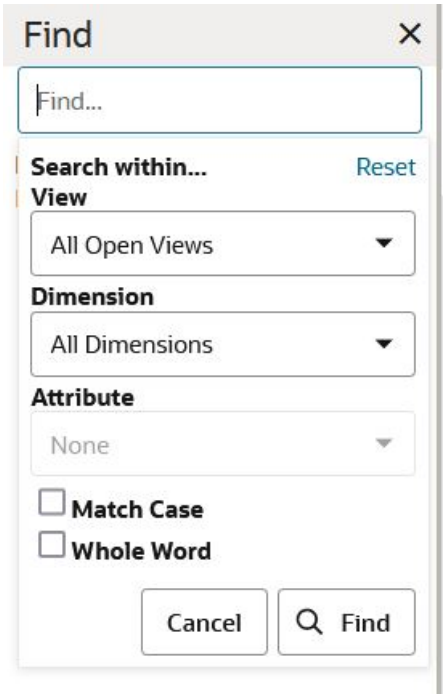
Figure 5-14 Find Panel



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 Open Views option is available from the View list. If All open 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.
   - You can search attributes to find the relevant positions by using the Attribute List. The attributes drop-down list has the list attributes related to the dimensions selected in the dimension drop-down list.
   - Select **Match Case** to make the search case sensitive. Leave it clear 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. If the attributes are selected, then the result includes the Attribute labels as well.

   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.

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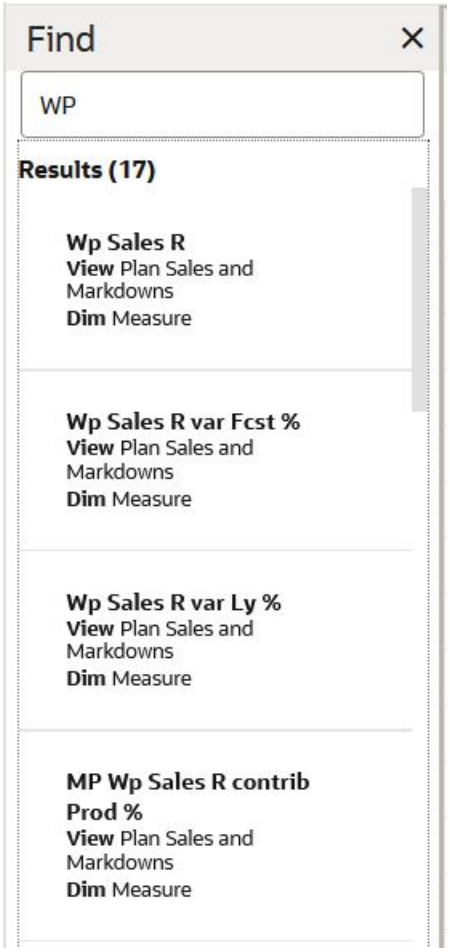
Figure 5-15 Find Results



9. The matching header scrolls to show the result in the appropriate view.

Attribute Search

You can find dimension position in workspace by searching the respective attribute related to it. The position label may not have all the relevant information whereas attributes are the additional details provided for each position. The Attribute Search makes it quick and easy to locate for positions in pivot table.

The Attribute Search is enabled only when the attributes are shown on the pivot table. You may display these attributes using the the Edit View and Show/Hide Attribute selection. The Attribute drop-down list has all of the attributes related to dimension. Based on the dimension selection in the Dimension drop-down list. The Attribute drop-down list shows the related attributes list. The attribute drop-down list shows the attributes for the dimension selected in the Dimension drop-down list.

The attribute of the matching search result is shown in the result description with prefix **Attr**. When the measure dimension is selected, Attribute drop-down list is set to **None**. Figure 5-16 shows an example of attribute search where product dimension is searched by attribute fabric: *cotton*.

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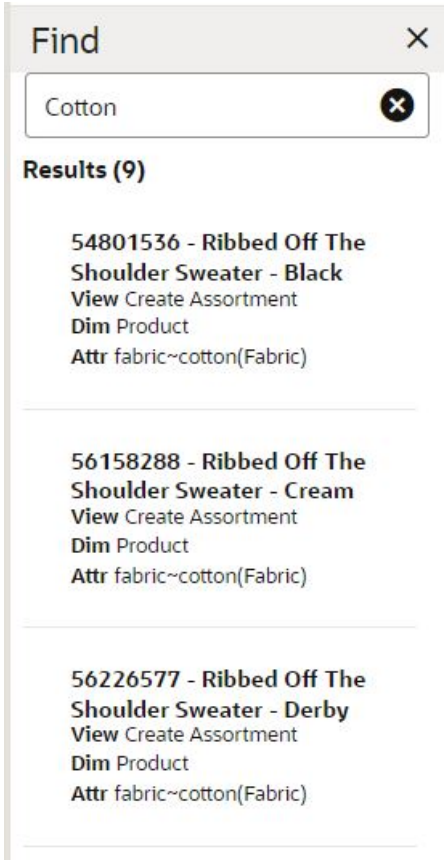
Figure 5-16 Attribute Search



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 using 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.

Pivot Table Context Menu

The Pivot Table Context menu gives you the list of the actions that can be performed on pivot table cell, column, or row header. An organized context menu gives you ease of selecting actions from a long list. In context menu, the actions are divided into sections based on the

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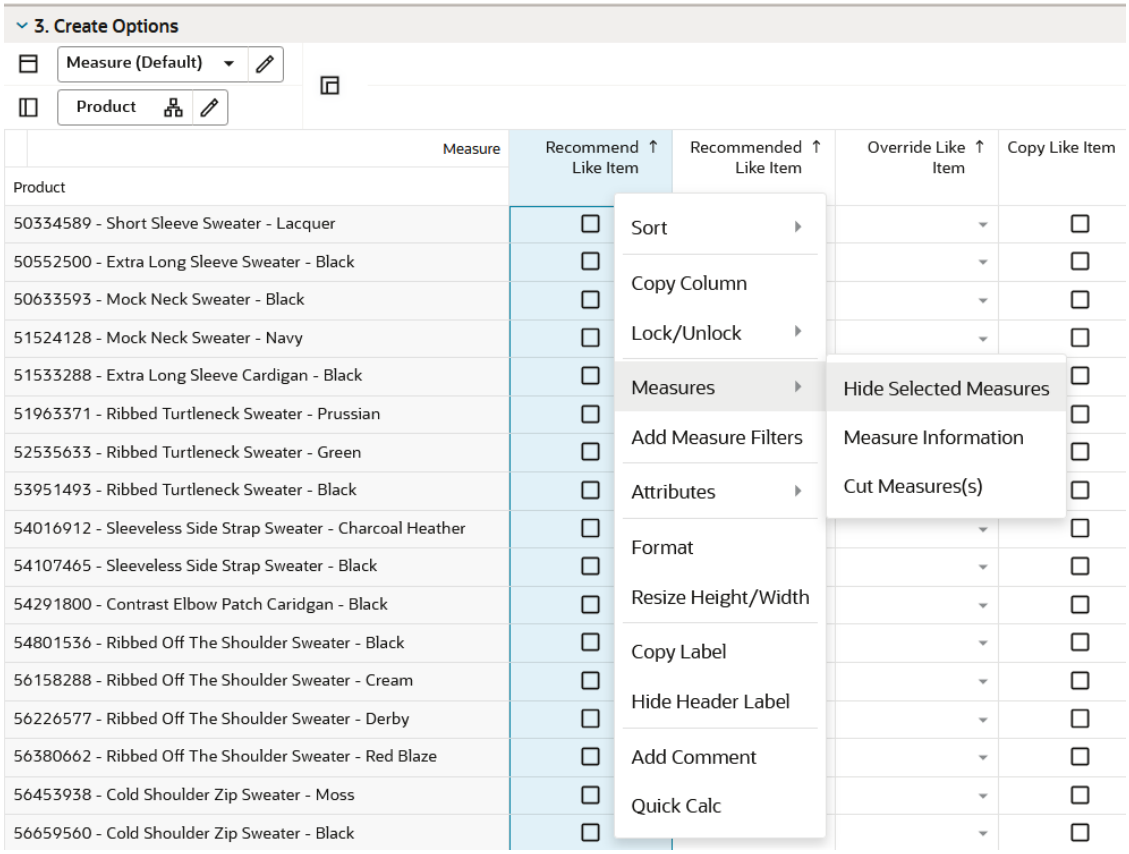
function groups. These grouped functions are shown in a sub-context menu. For example the actions related to measures are combined together.

Figure 5-17 Context Menu Measure Options



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 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.

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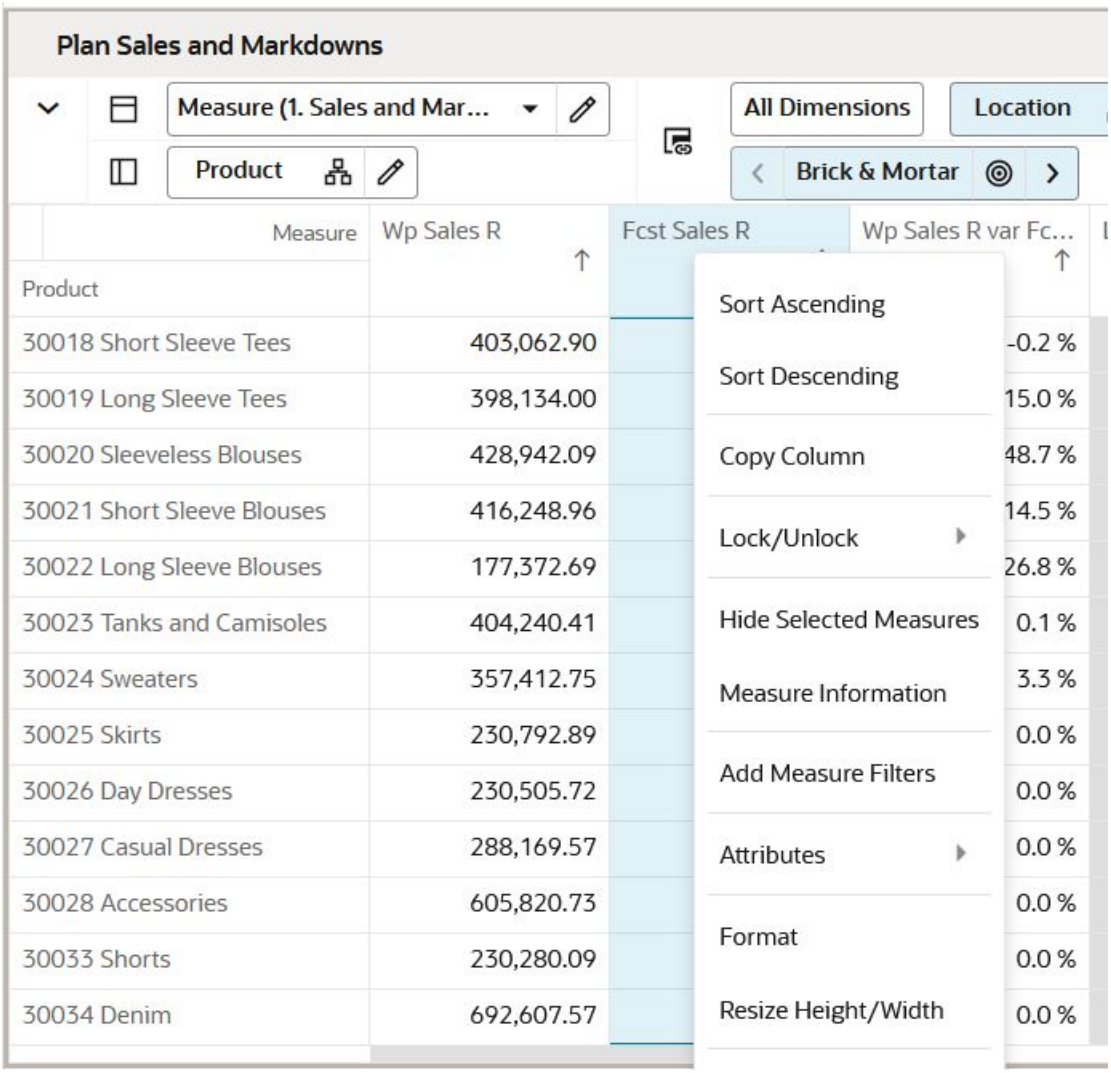
Figure 5-18 Open Measure Information



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

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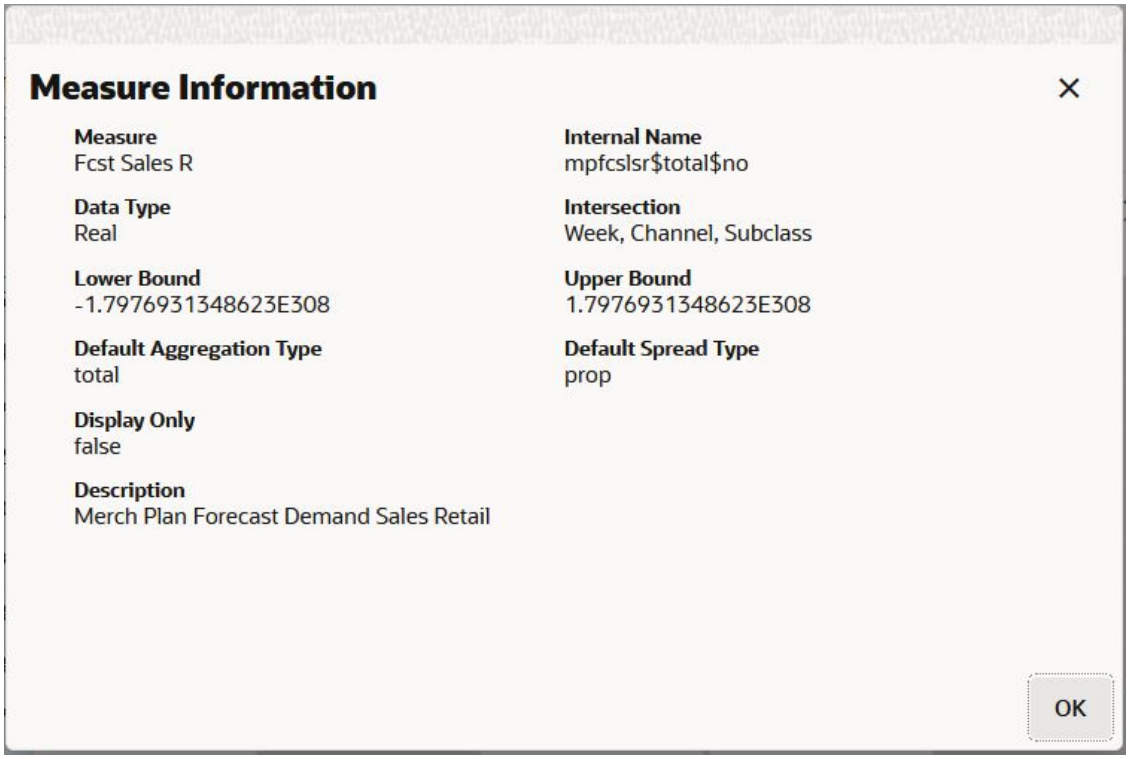
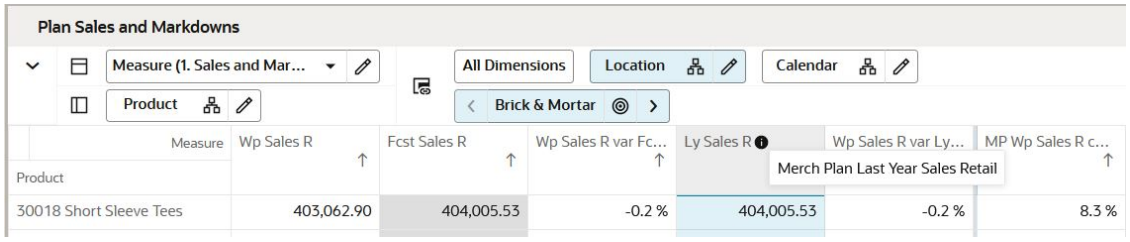
Figure 5-19 Measure Information



A tool tip displays the measure description for the measure header. When you hover over the measure header, an i icon appears. Hover over the i to display the measure description. This minimizes your need to refer to documentation. The following figure shows an example of the tool tip with the measure description.

Figure 5-20 Measure Description Tool Tip



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.

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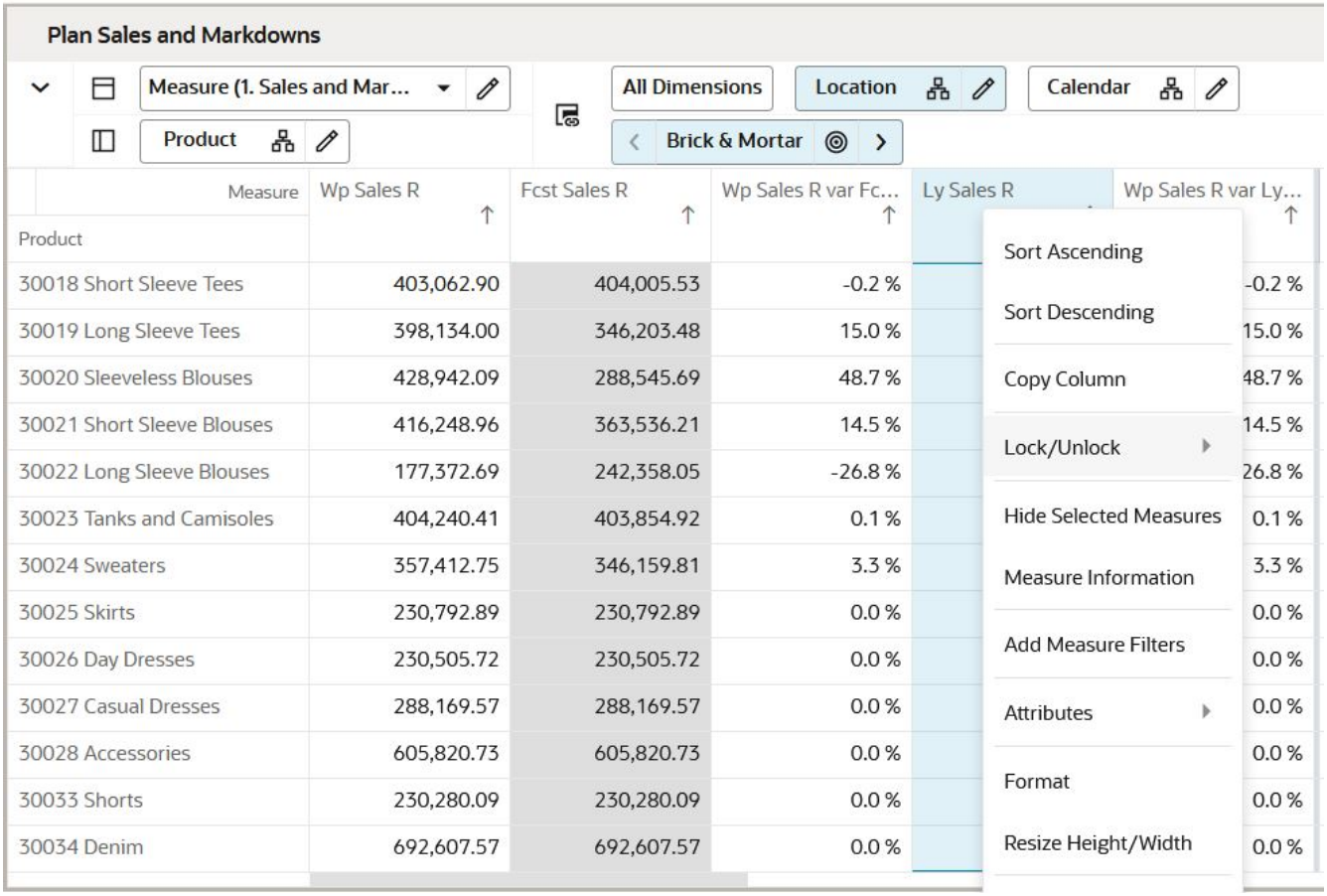
Figure 5-21 Hide Selected Measures



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.

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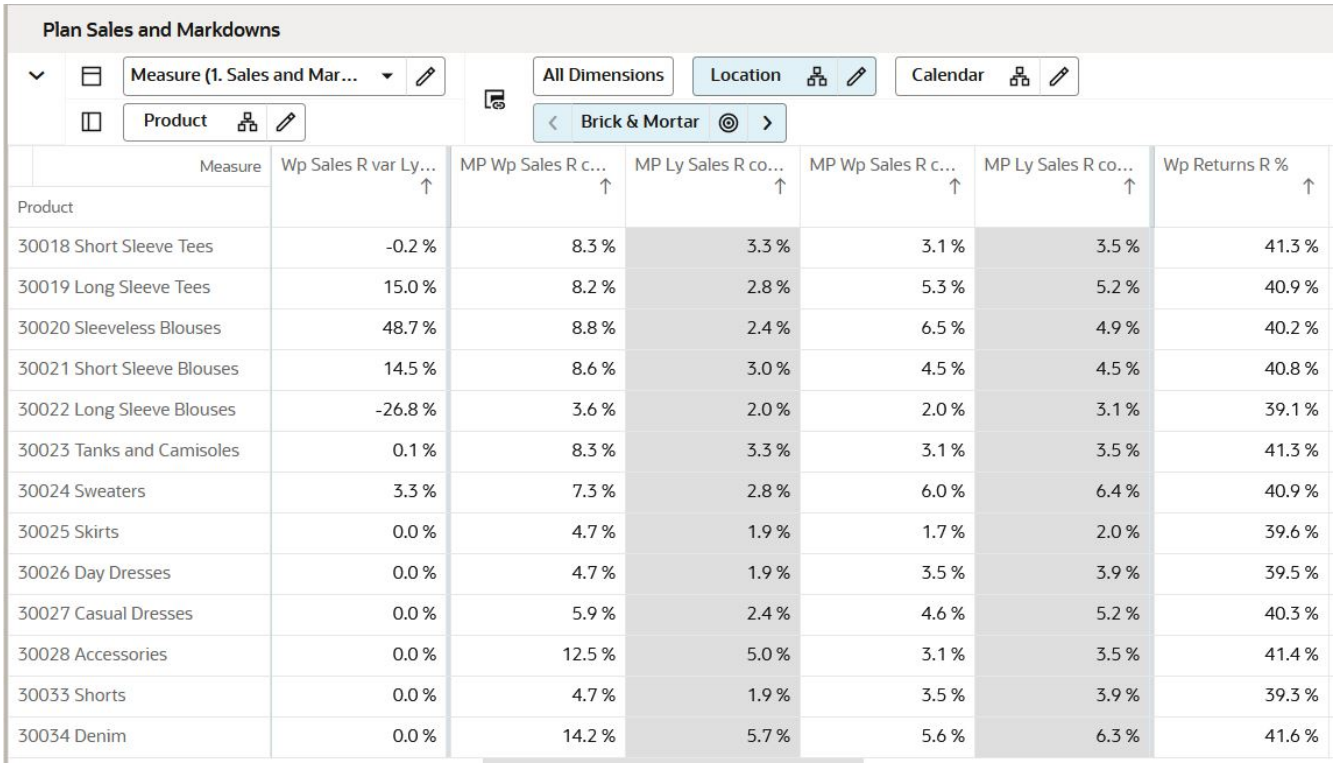
Figure 5-22 Unhide Selected Measures



Product	Wp Sales R var Ly...	MP Wp Sales R c...	MP Ly Sales R co...	MP Wp Sales R c...	MP Ly Sales R co...	Wp Returns R %
30018 Short Sleeve Tees	-0.2 %	8.3 %	3.3 %	3.1 %	3.5 %	41.3 %
30019 Long Sleeve Tees	15.0 %	8.2 %	2.8 %	5.3 %	5.2 %	40.9 %
30020 Sleeveless Blouses	48.7 %	8.8 %	2.4 %	6.5 %	4.9 %	40.2 %
30021 Short Sleeve Blouses	14.5 %	8.6 %	3.0 %	4.5 %	4.5 %	40.8 %
30022 Long Sleeve Blouses	-26.8 %	3.6 %	2.0 %	2.0 %	3.1 %	39.1 %
30023 Tanks and Camisoles	0.1 %	8.3 %	3.3 %	3.1 %	3.5 %	41.3 %
30024 Sweaters	3.3 %	7.3 %	2.8 %	6.0 %	6.4 %	40.9 %
30025 Skirts	0.0 %	4.7 %	1.9 %	1.7 %	2.0 %	39.6 %
30026 Day Dresses	0.0 %	4.7 %	1.9 %	3.5 %	3.9 %	39.5 %
30027 Casual Dresses	0.0 %	5.9 %	2.4 %	4.6 %	5.2 %	40.3 %
30028 Accessories	0.0 %	12.5 %	5.0 %	3.1 %	3.5 %	41.4 %
30033 Shorts	0.0 %	4.7 %	1.9 %	3.5 %	3.9 %	39.3 %
30034 Denim	0.0 %	14.2 %	5.7 %	5.6 %	6.3 %	41.6 %

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 5-23.

Figure 5-23 Current Measure Profile

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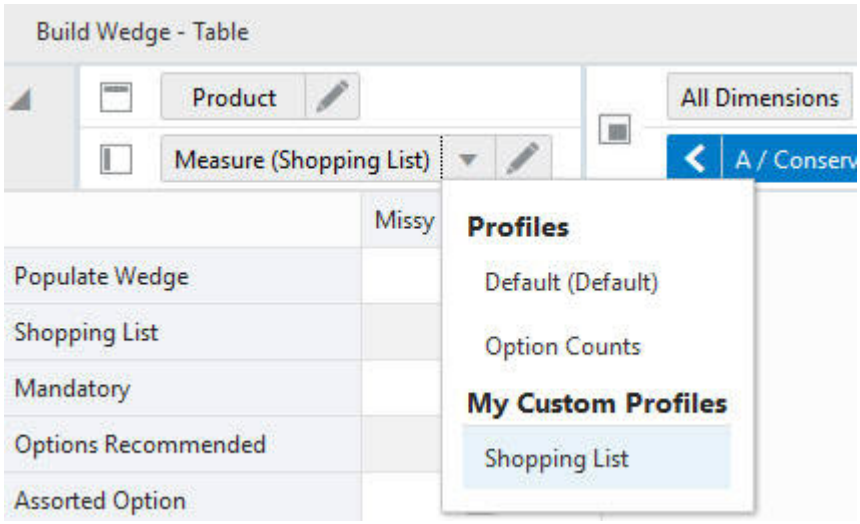
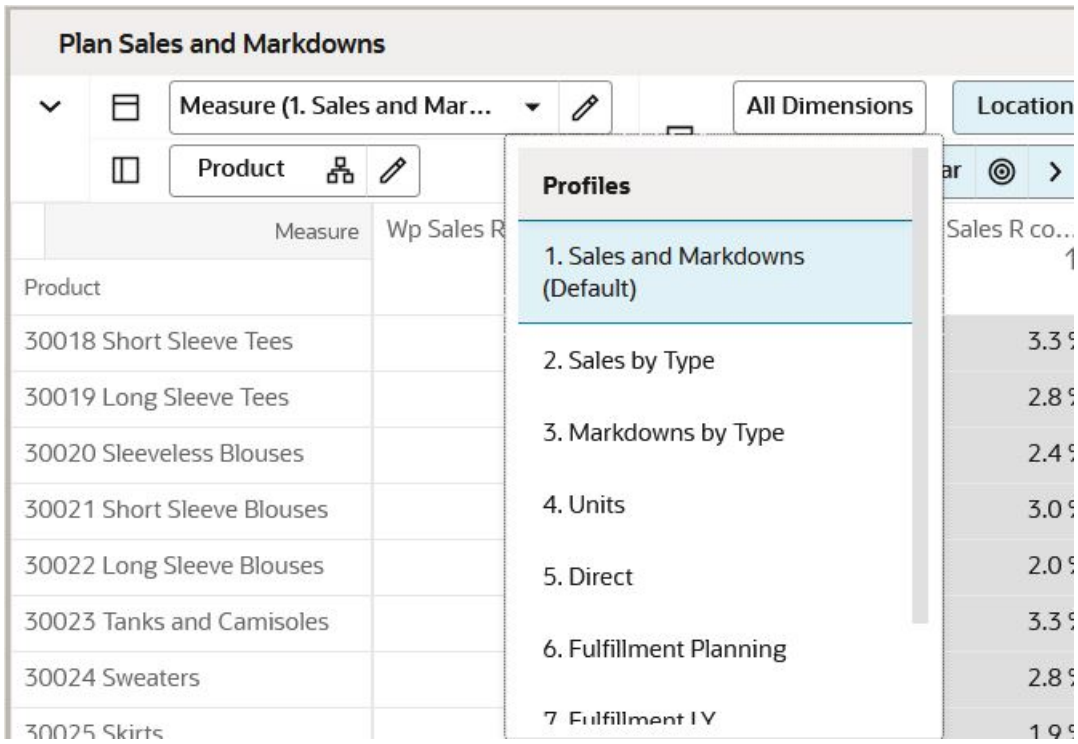
Figure 5-24 Selected Measure Profile Displayed on Measure Tile



To switch between measure profiles, select the required measure profile from the list of Measure dimension tile, as shown in Figure 5-25. 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 5-25 Select Measure Profile



Multi-Item Measure

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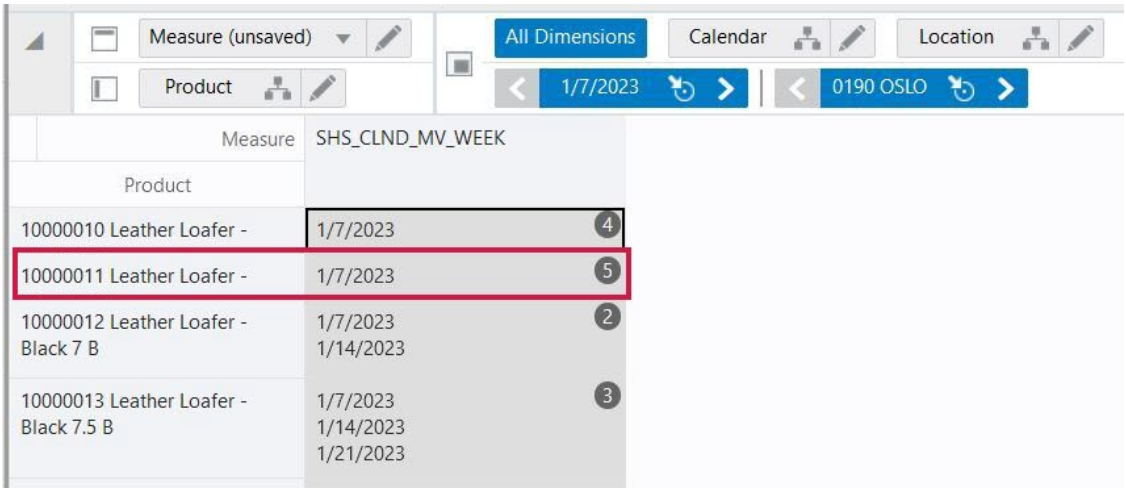
You can add multi-item measure to see a concatenated list of positions for a dimension. You can see the alerts or offers related to a position in single cell. This is a read-only measure that can be configured from Config Tools using the single hierarchy select measure property. This measure displays the list of items related to the position along with the total count of the items. Figure 5-26 shows that position 10000011 Leather Loafer has five dates and a badge on the right top corner of cell showing count of the items. If the count of item displayed in cell exceeds 99, then the badge displays **99+**. For more details on how to configure the multi list measure, refer to the *Oracle Retail Predictive Application Server Cloud Edition Configuration Guide*.

Figure 5-26 Multi-Item Measure



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 5-27 Select Single Row

Measure / Product	Wp Sales R	Fcst Sales R	Wp Sales R var Fc...	Ly Sales R
30018 Short Sleeve Tees	403,062.90	404,005.53	-0.2 %	404,005.53
30019 Long Sleeve Tees	398,134.00	346,203.48	15.0 %	346,203.48
30020 Sleeveless Blouses	428,942.09	288,545.69	48.7 %	288,545.69
30021 Short Sleeve Blouses	416,248.96	363,536.21	14.5 %	363,536.21
30022 Long Sleeve Blouses	177,372.69	242,358.05	-26.8 %	242,358.05
30023 Tanks and Camisoles	404,240.41	403,854.92	0.1 %	403,854.92

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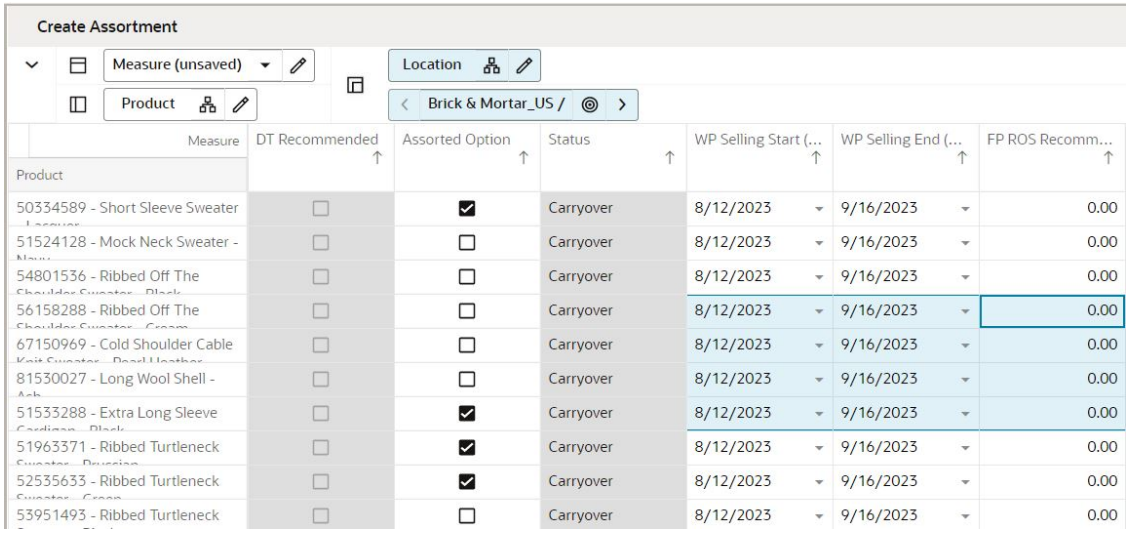
Selecting a Group of Contiguous Rows or Columns

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 5-28 Select a Group of Contiguous Rows or Columns



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.

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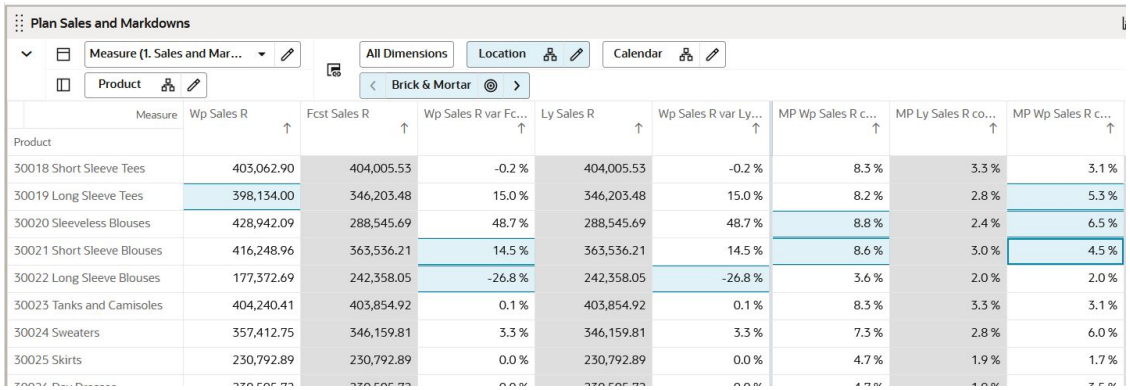
Figure 5-29 Select a Group of Non-Contiguous Rows or Columns

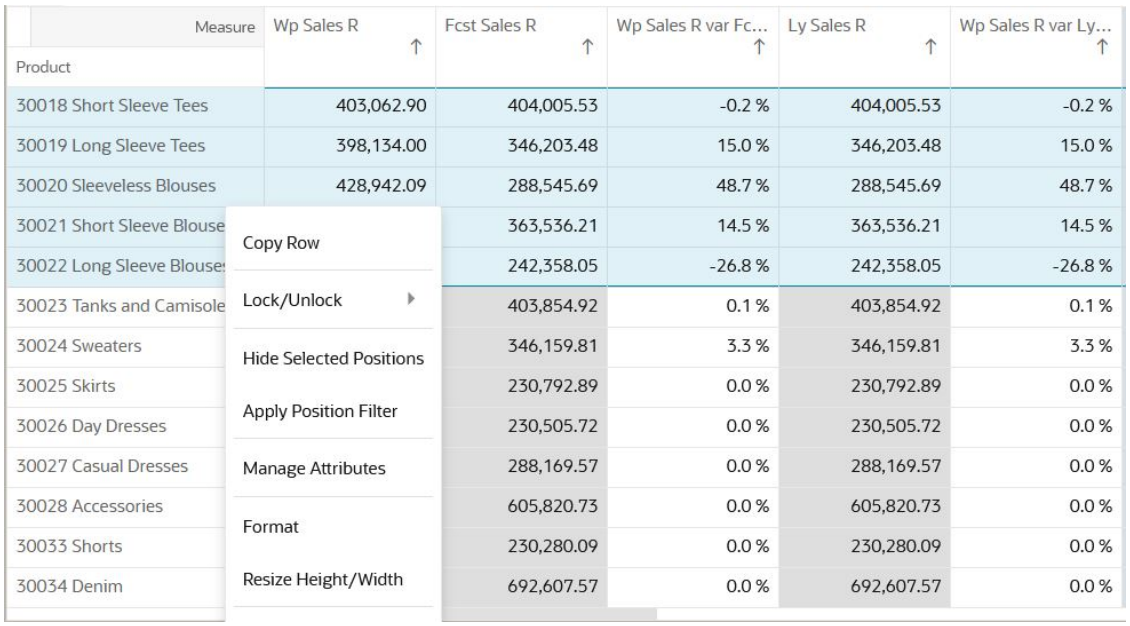


Measure / Product	Wp Sales R	Fcst Sales R	Wp Sales R var Fc...	Ly Sales R	Wp Sales R var Ly...	MP Wp Sales R c...	MP Ly Sales R co...	MP Wp Sales R c...
30018 Short Sleeve Tees	403,062.90	404,005.53	-0.2 %	404,005.53	-0.2 %	8.3 %	3.3 %	3.1 %
30019 Long Sleeve Tees	398,134.00	346,203.48	15.0 %	346,203.48	15.0 %	8.2 %	2.8 %	5.3 %
30020 Sleeveless Blouses	428,942.09	288,545.69	48.7 %	288,545.69	48.7 %	8.8 %	2.4 %	6.5 %
30021 Short Sleeve Blouses	416,248.96	363,536.21	14.5 %	363,536.21	14.5 %	8.6 %	3.0 %	4.5 %
30022 Long Sleeve Blouses	177,372.69	242,358.05	-26.8 %	242,358.05	-26.8 %	3.6 %	2.0 %	2.0 %
30023 Tanks and Camisoles	404,240.41	403,854.92	0.1 %	403,854.92	0.1 %	8.3 %	3.3 %	3.1 %
30024 Sweaters	357,412.75	346,159.81	3.3 %	346,159.81	3.3 %	7.3 %	2.8 %	6.0 %
30025 Skirts	230,792.89	230,792.89	0.0 %	230,792.89	0.0 %	4.7 %	1.9 %	1.7 %

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 5-30 Select Rows to Resize



Measure / Product	Wp Sales R	Fcst Sales R	Wp Sales R var Fc...	Ly Sales R	Wp Sales R var Ly...
30018 Short Sleeve Tees	403,062.90	404,005.53	-0.2 %	404,005.53	-0.2 %
30019 Long Sleeve Tees	398,134.00	346,203.48	15.0 %	346,203.48	15.0 %
30020 Sleeveless Blouses	428,942.09	288,545.69	48.7 %	288,545.69	48.7 %
30021 Short Sleeve Blouse		363,536.21	14.5 %	363,536.21	14.5 %
30022 Long Sleeve Blouses		242,358.05	-26.8 %	242,358.05	-26.8 %
30023 Tanks and Camisole		403,854.92	0.1 %	403,854.92	0.1 %
30024 Sweaters		346,159.81	3.3 %	346,159.81	3.3 %
30025 Skirts		230,792.89	0.0 %	230,792.89	0.0 %
30026 Day Dresses		230,505.72	0.0 %	230,505.72	0.0 %
30027 Casual Dresses		288,169.57	0.0 %	288,169.57	0.0 %
30028 Accessories		605,820.73	0.0 %	605,820.73	0.0 %
30033 Shorts		230,280.09	0.0 %	230,280.09	0.0 %
30034 Denim		692,607.57	0.0 %	692,607.57	0.0 %

Table 5-1 Resizing Rows and Columns

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

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

Figure 5-31 Default Height and Width

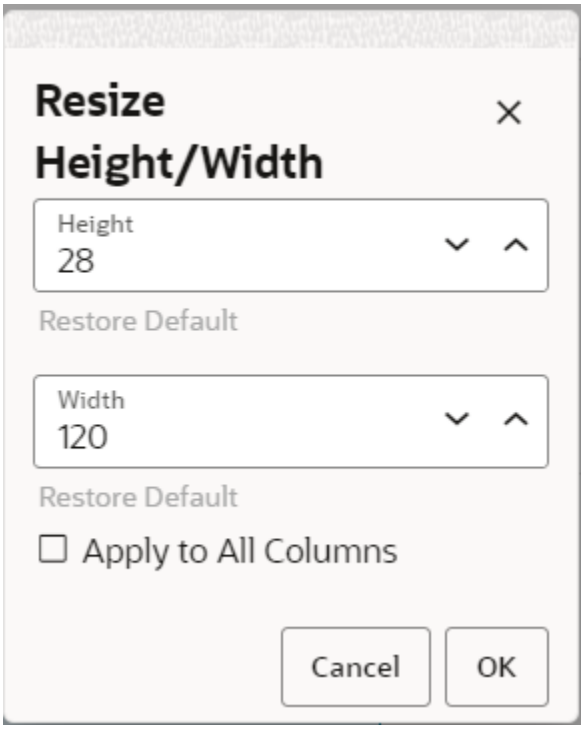
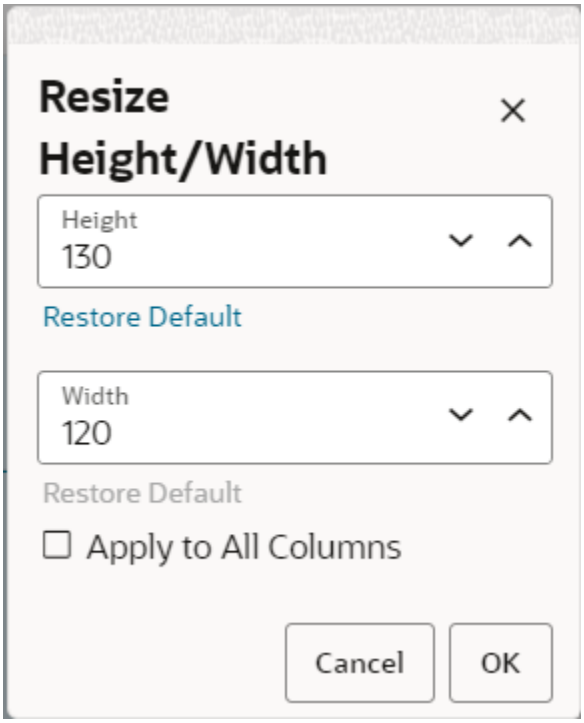


Figure 5-32 Resize Height or Width



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You can restore the selected row or column headers to the default size by clicking the **Restore Default** option. After you change the default height or width value, the **Restore Default** link is available. Click **Restore Default** to revert back to default size values. You can resize the height and width of all columns or rows by selecting the checkboxes; **Apply to All Columns** or **Apply to All Rows**.

Figure 5-33 Resizing Results

Measure / Product	Wp Sales R	Fcst Sales R	Wp Sales R var Fc...	Ly Sales R	Wp Sales R var Ly...
30018 Short Sleeve Tees	403,062.90	404,005.53	-0.2 %	404,005.53	-0.2 %
30019 Long Sleeve Tees	398,134.00	346,203.48	15.0 %	346,203.48	15.0 %
30020 Sleeveless Blouses	428,942.09	288,545.69	48.7 %	288,545.69	48.7 %
30021 Short Sleeve Blouses	416,248.96	363,536.21	14.5 %	363,536.21	14.5 %
30022 Long Sleeve Blouses	177,372.69	242,358.05	-26.8 %	242,358.05	-26.8 %
30023 Tanks and Camisoles	404,240.41	403,854.92	0.1 %	403,854.92	0.1 %
30024 Sweaters	357,412.75	346,159.81	3.3 %	346,159.81	3.3 %

Expanding and Collapsing Levels in Rows and Columns

Collapse functionality allows a planner to group the child level to view data at summary level. Expand functionality allows a planner to drill-down by level to see the data at the lower levels. Quick Collapse and Expand of the levels in the pivot table helps you to see the data in a way that is meaningful to you, and is easy to navigate.

You can collapse or expand a dimension using context menu (right-click) Collapse or Expand function. Collapse functionality groups the child positions of the selected parent position. Expand functionality expands all the child positions belonging to a selected parent. You can select more than one column or row dimension level and right-click to Expand or Collapse lower levels for that position only.

For example: In a calendar dimension that has a levels week beneath the month of January and February and a planner collapses the month of January, then all the week levels beneath the month of January will collapse.

Collapse All and Expand All

The same functionality of collapse has been extended to Collapse All which collapses child levels of all the positions of the selected dimension in the view. Similarly, the expand functionality has been extended to Expand All which expands child levels of all the position of selected dimension in the view. The selected dimension level is specified next to the Collapse All or Expand All in context menu. With Collapse All or Expand All you can quickly view data as desired without navigating to edit view.

For example, there are 10 sub-classes with three style colors each, when a planner applies Collapse All on one subclass, it collapses style colors across the 10 subclasses. The data is shown at sub class level in the view.

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> **Note**
>
> Collapse All or expand all functionality does not collapse every level in the dimension hierarchy. It collapses or expands only the selected position. Assume, there are two department with three subclasses and five styles in each subclass. The Collapse all function applied at department level will collapse the sub class beneath it but does not collapse the child under subclass.

> **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. Right-click on any position in a row or column header and select Show Attributes from the contextual menu. This displays the Attribute Name: Attribute Value list against the position in a single cell.

Figure 5-34 Show Attributes

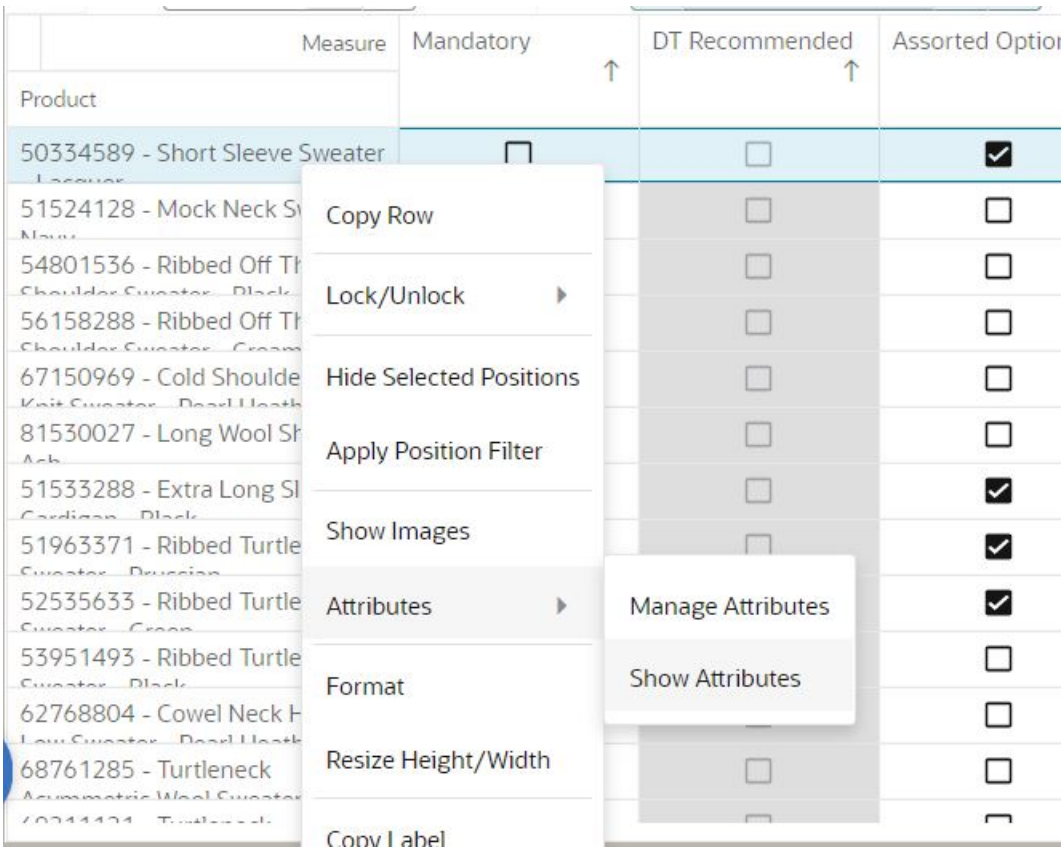

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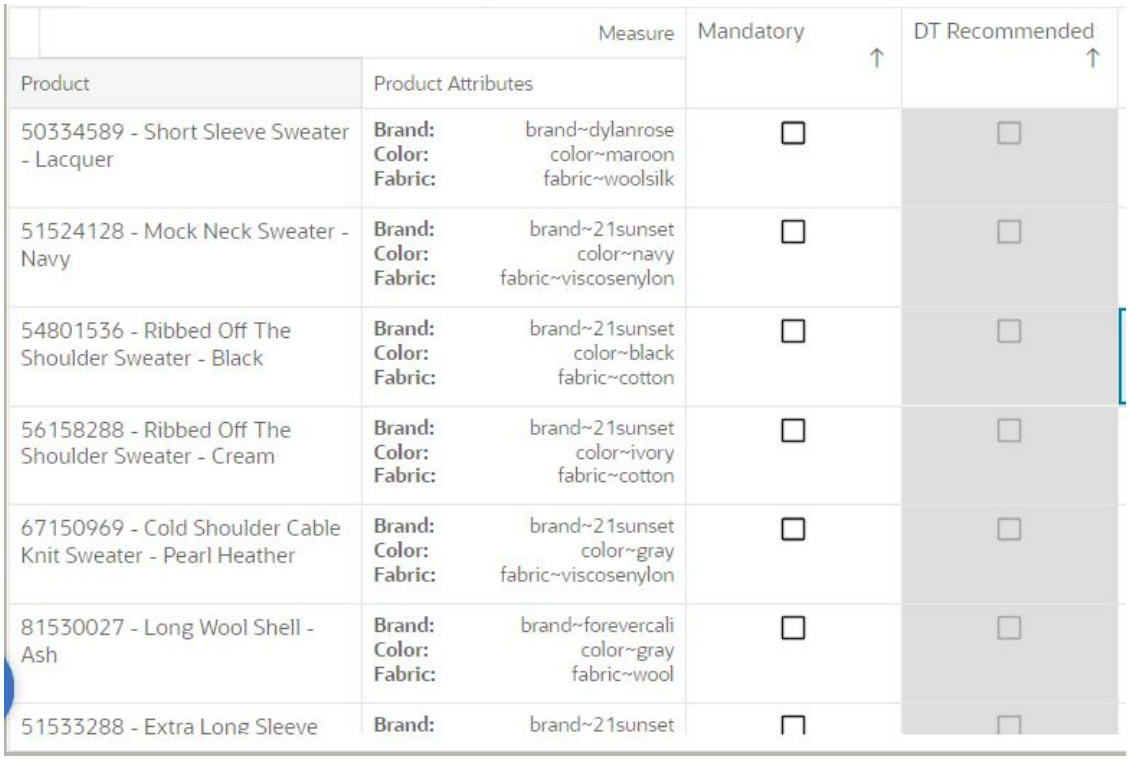
Figure 5-35 Attribute List Visible in a Single Cell



To show the attributes in separate columns, you can right-click on position and from the Attribute sub –menu, select **Show Attribute in Separate Column**.

Figure 5-36 Context Menu - Show Attributes in Separate Columns

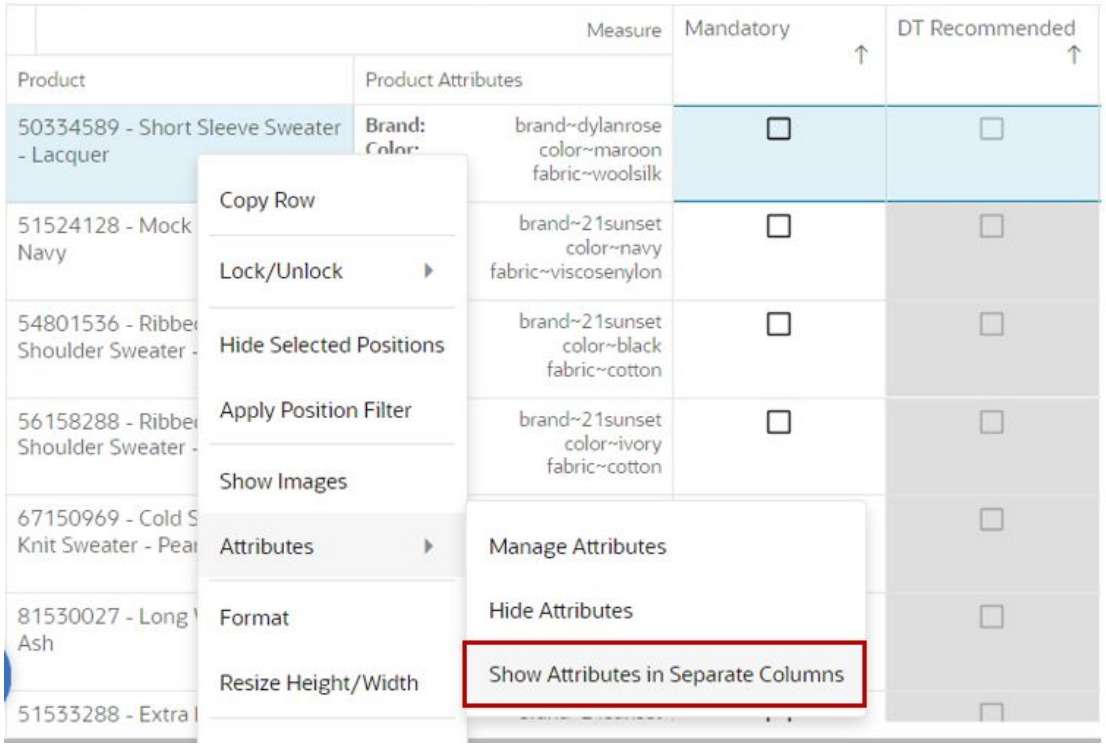


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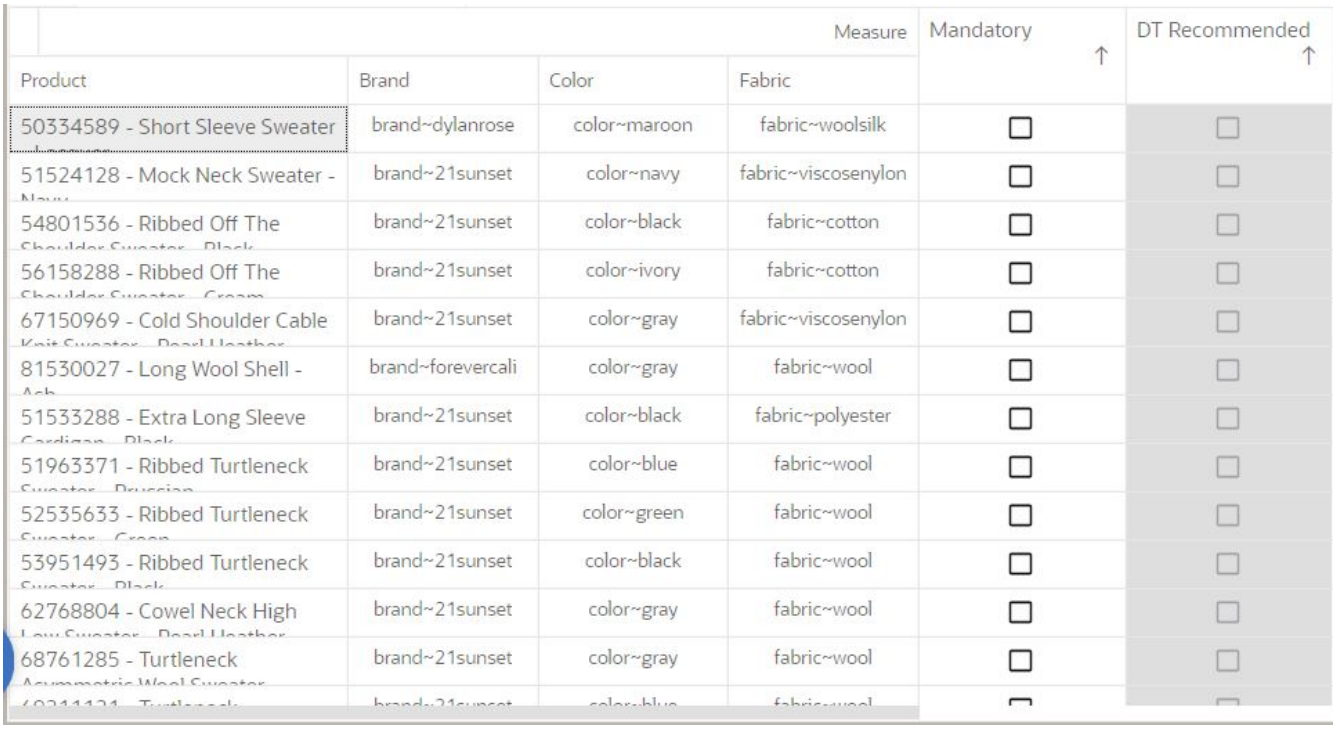
Figure 5-37 Attributes in Separate Columns



Product	Brand	Color	Fabric	Measure: Mandatory	Measure: DT Recommended
50334589 - Short Sleeve Sweater	brand~dylanrose	color~maroon	fabric~woolsilk	☐	☐
51524128 - Mock Neck Sweater -	brand~21sunset	color~navy	fabric~viscosenylon	☐	☐
54801536 - Ribbed Off The	brand~21sunset	color~black	fabric~cotton	☐	☐
56158288 - Ribbed Off The	brand~21sunset	color~ivory	fabric~cotton	☐	☐
67150969 - Cold Shoulder Cable	brand~21sunset	color~gray	fabric~viscosenylon	☐	☐
81530027 - Long Wool Shell -	brand~forevercali	color~gray	fabric~wool	☐	☐
51533288 - Extra Long Sleeve	brand~21sunset	color~black	fabric~polyester	☐	☐
51963371 - Ribbed Turtleneck	brand~21sunset	color~blue	fabric~wool	☐	☐
52535633 - Ribbed Turtleneck	brand~21sunset	color~green	fabric~wool	☐	☐
53951493 - Ribbed Turtleneck	brand~21sunset	color~black	fabric~wool	☐	☐
62768804 - Cowel Neck High	brand~21sunset	color~gray	fabric~wool	☐	☐
68761285 - Turtleneck	brand~21sunset	color~gray	fabric~wool	☐	☐

You can also sort the positions by sorting attributes in ascending or descending order when you right-click on the attribute header. The context menu sort on the attribute is in sync with the edit view sorting functionality. To remove sorting from attribute, you can right-click on the attribute header and select **Remove Sorting**.

To show the attributes again in single column again, you can right-click the position and select the context menu option, **Show Attributes in Single Column**.

Note- If you bring high number of attributes in the separate column, you may not see the pivot table x-axis dimension columns. To bring back the x-axis dimension columns, just resize the attribute columns to a smaller size.

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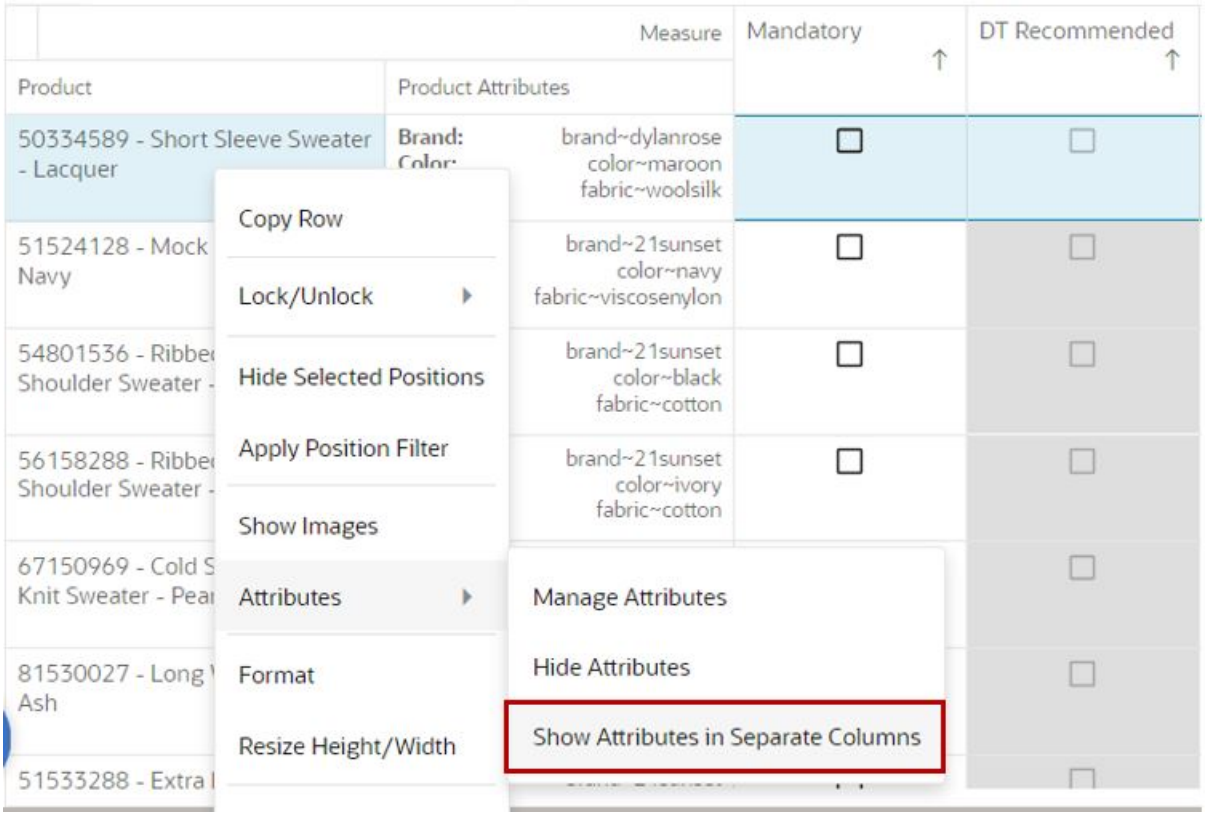
Figure 5-38 Context Menu - Show Attributes in Single Column



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

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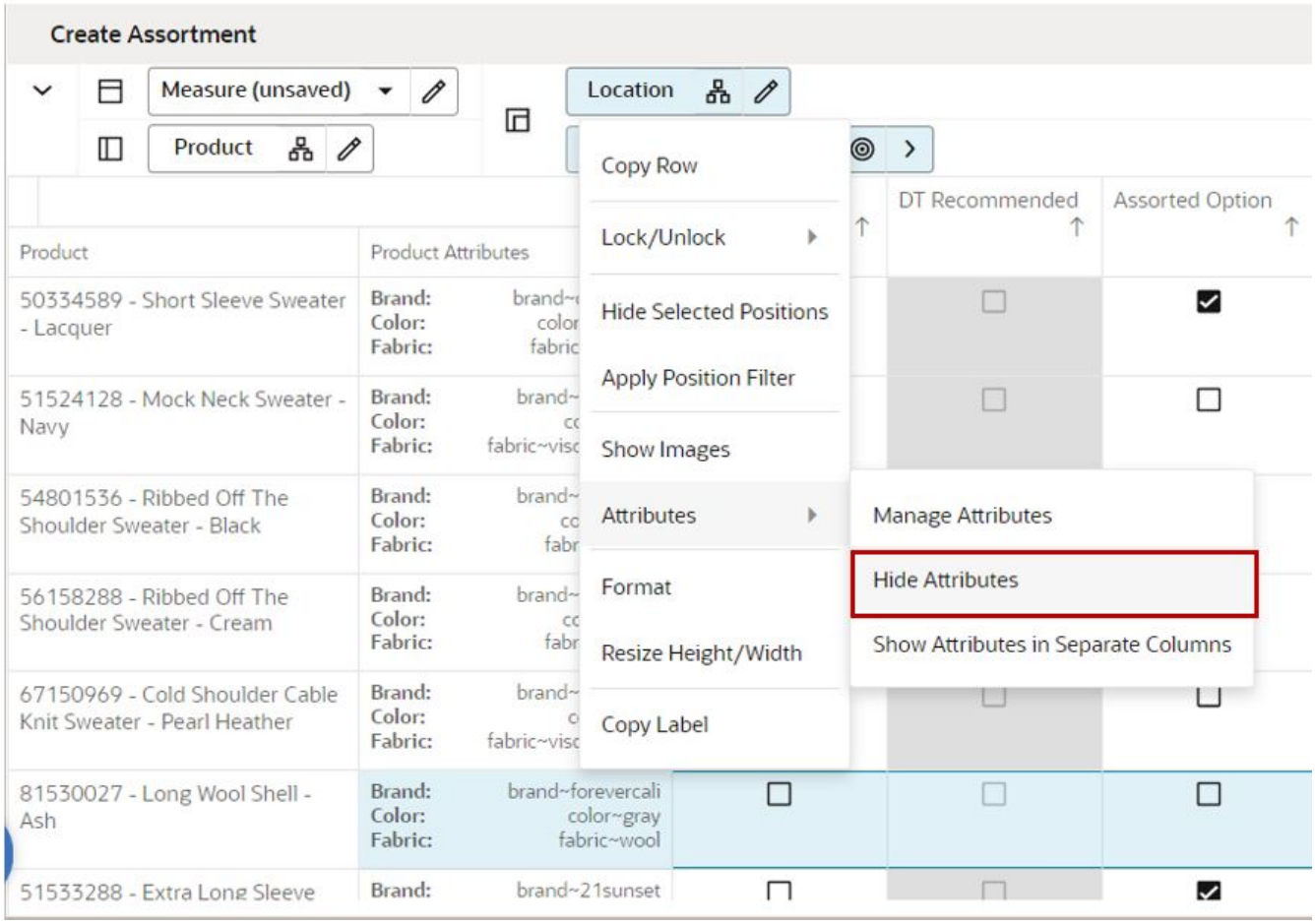
Figure 5-39 Hide Attributes



Hide Selected Position

You can hide selected positions by using the context menu option, Hide Selected Position. This saves you from opening the Edit view and selecting positions to hide.

You can hide one or multiple positions using hide position function in the view. Once your work is complete, you can view all the positions by selecting the hidden positions from edit view.

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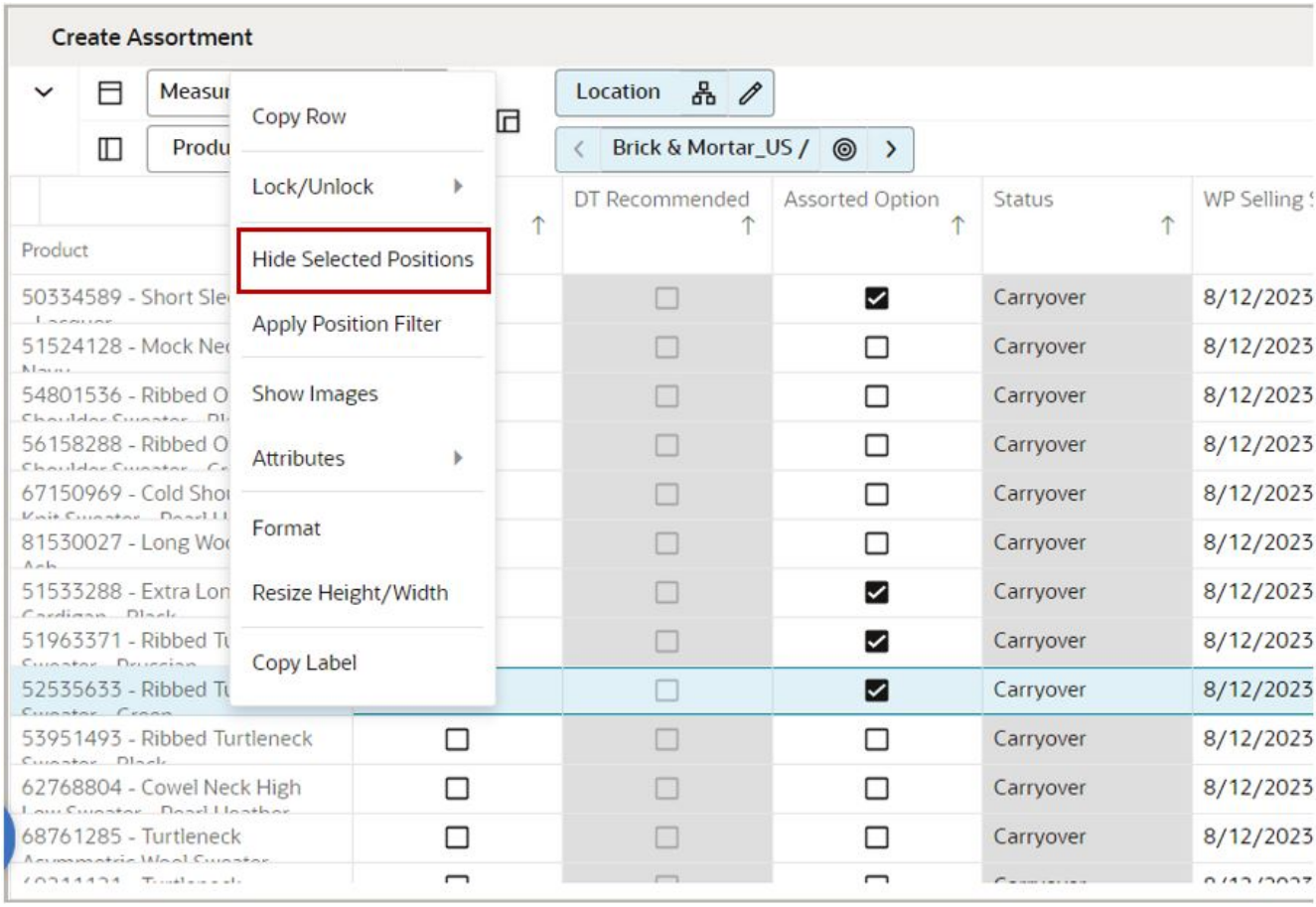
Figure 5-40 Hide Selected Positions



Showing or Hiding the Column or Row Header Label

You can show or hide the column or row header label. It provides you more working space on the pivot table.

Perform following steps to use this feature:

1. Select the row or column header and right-click to display the context menu. Select **Hide Header Label** to hide the selected row or column header.

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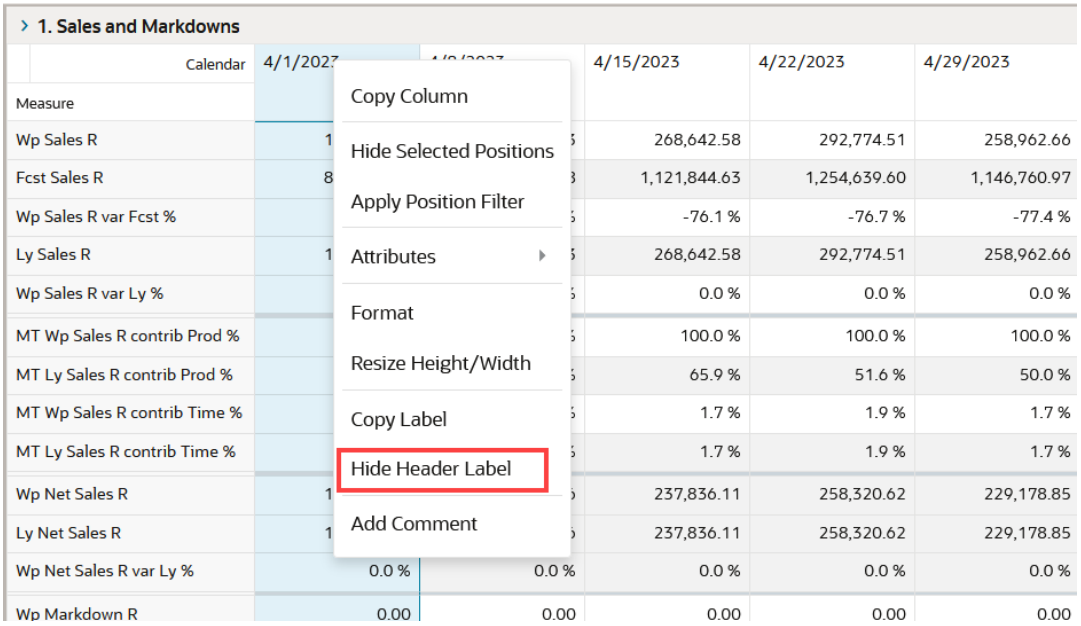
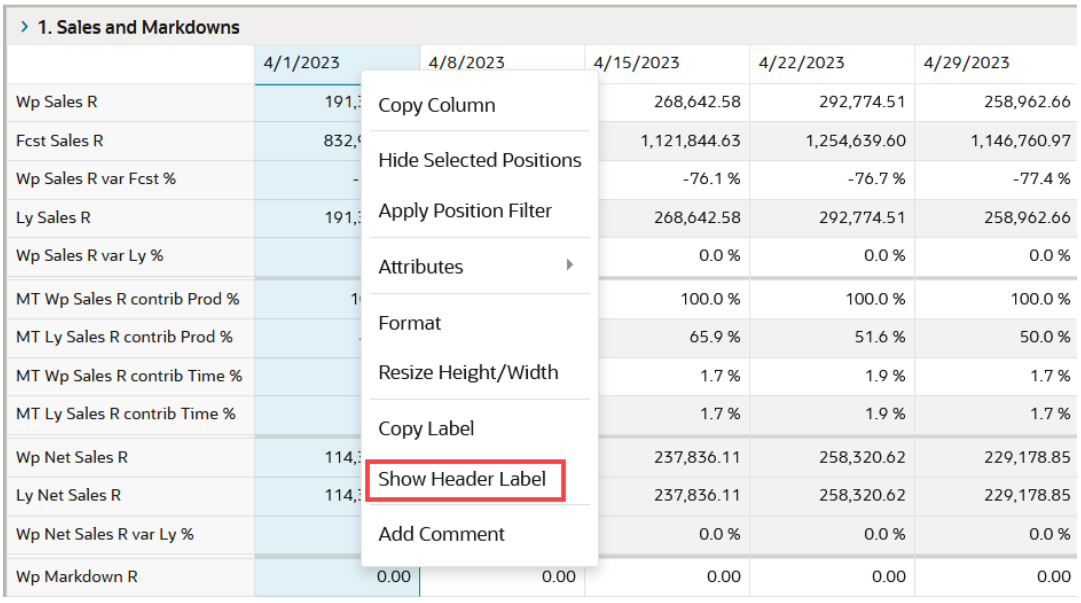
Figure 5-41 Hide Header Label Menu



2. To display the row or column header, right-click on the header and select **Show Header Label** to display the selected row or column header

Figure 5-42 Show Header Label Menu



Displaying Attributes in the Z-axis

You can show and hide attributes in the z-axis. The show and hide attribute feature in the z-axis works bit differently than the other axis. The display of attributes in z-axis helps you to plan with attributes.

This feature also continually displays the primary attribute in the z-axis. Perform the following steps to use this feature.

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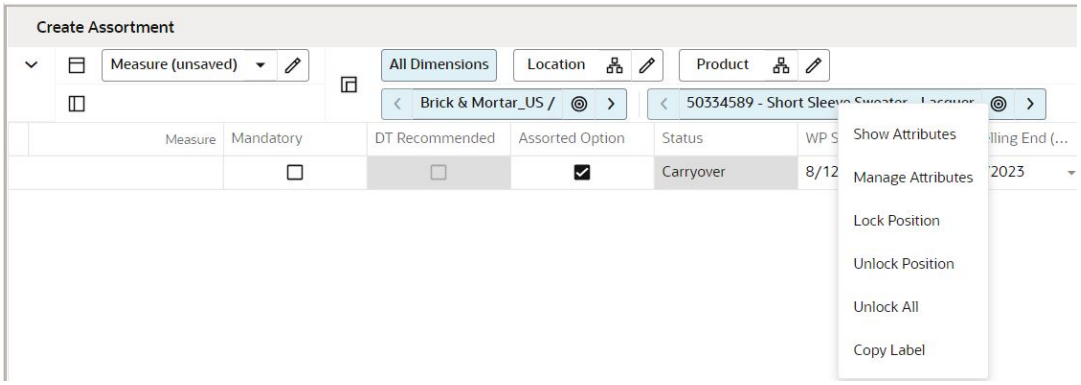
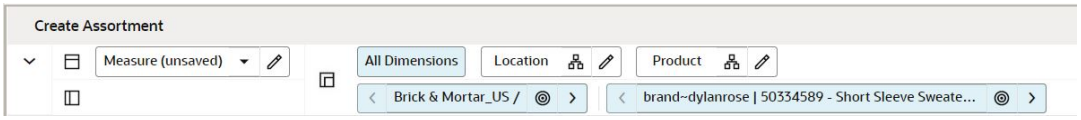
1. Right-click on the Z-axis to display the menu for Show Attributes and Manage Attributes.

Figure 5-43 Show Attributes and Manage Attributes Menu for the Z-axis



2. To show attributes for the Z-axis, right-click the z-axis and select **Show Attributes** from the menu to display the first attribute. This action only displays the first attribute in the attribute list with a pipe delimiter (**|**).

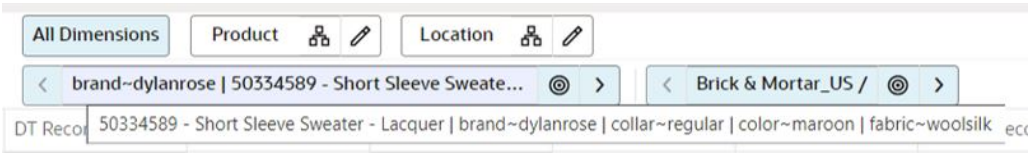
Figure 5-44 Displaying the Attribute for the Z-axis



To view all of the selected attributes that belong to the specific dimension, either:

a. Hover over the Z-axis. Each attribute is separated with a pipe delimiter (**|**).

Figure 5-45 Hover to View All of the Selected Attributes in the Z-axis



b. Click the Edit icon on the Z-axis to view the list of selected attributes.

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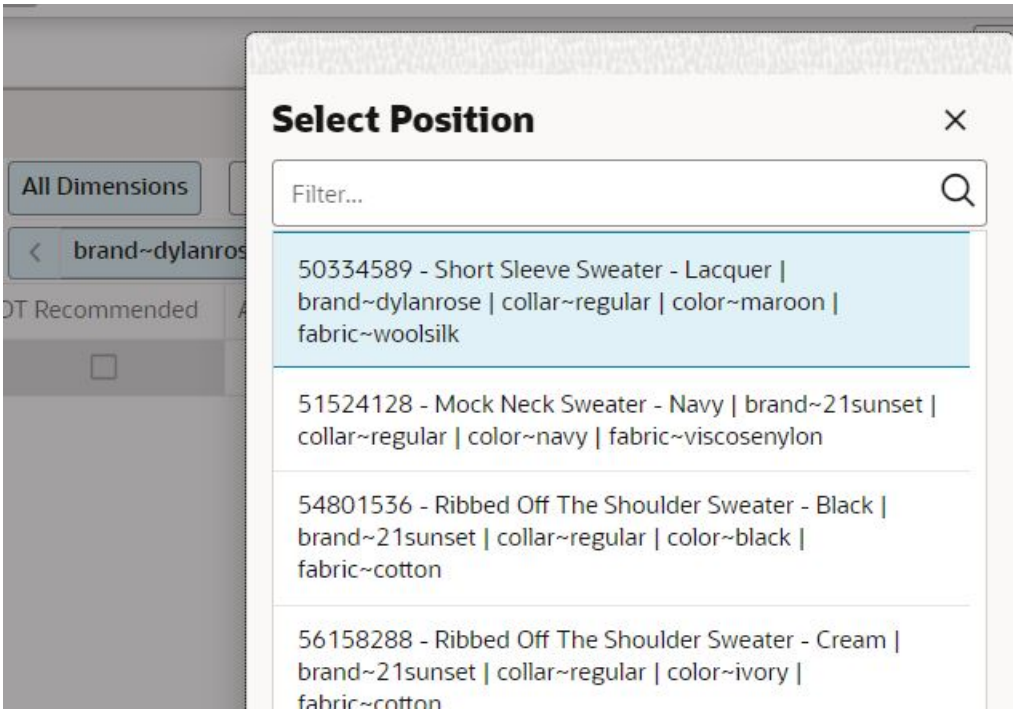
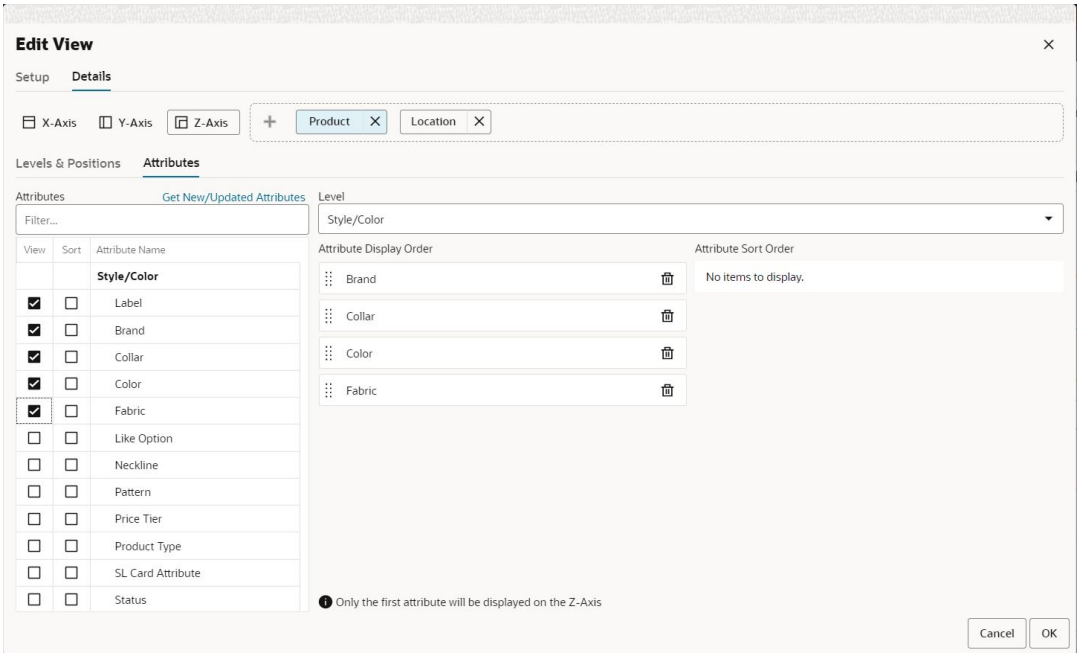
Figure 5-46 Using Edit to Display the List of Attributes in the Z-axis



3. To manage attributes for the Z-axis, right-click the z-axis and select **Manage Attributes** from the menu to open the standard edit view, You can select the attributes for the dimension from this view.

Figure 5-47 Edit View for the Z-axis



4. This action only displays the first attribute in the attribute list.

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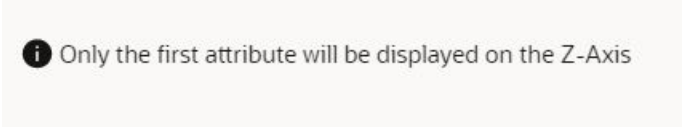
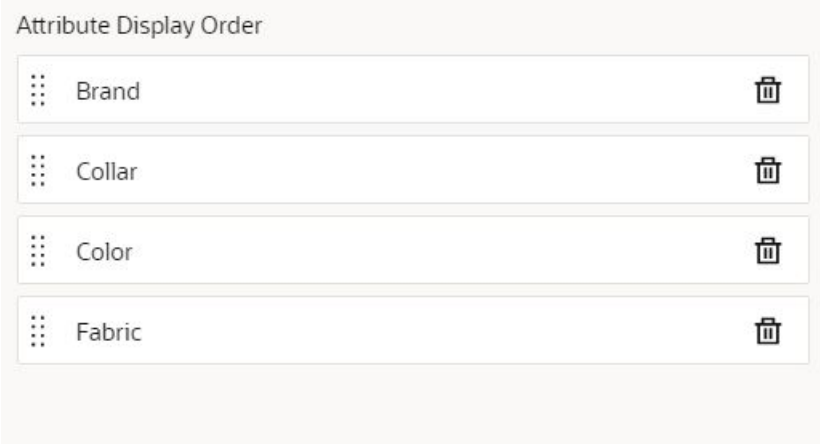
Figure 5-48 First Attribute Message



To view all of the selected attributes, hover over the Z-axis dimension.

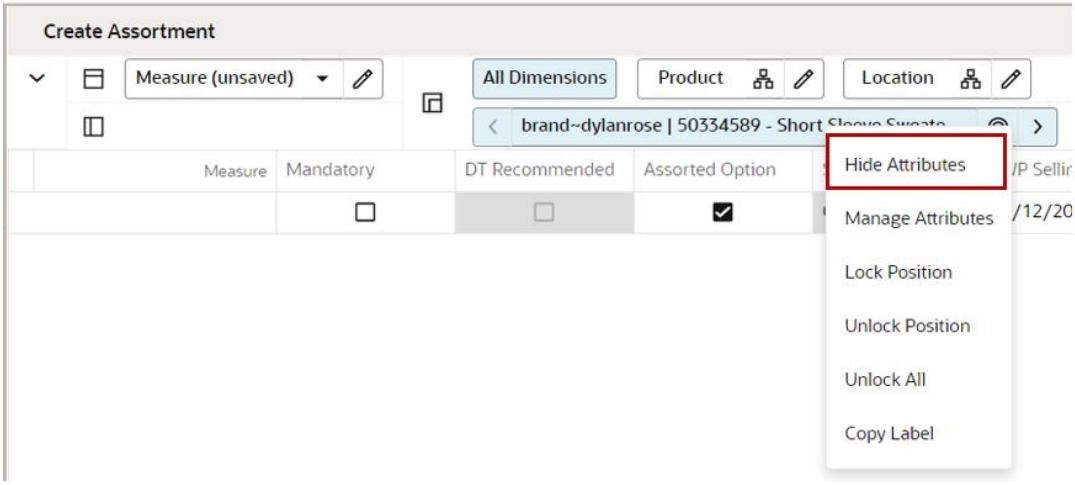
As shown in Figure 5-49, Product Type is the first attribute in the attribute list. You can drag and drop the attributes to change the display order the list

Figure 5-49 Display Order of Attribute



5. When the attribute is already displayed in z-axis, you can right-click the z-axis and select **Hide Attributes** from the menu to hide the attribute

Figure 5-50 Hide Attributes Menu



Cells

Your ability to edit multiple workbook cells at once and to move chunks of data in and out of the workbook is essential to using RPASCE efficiently and effectively. This section describes how

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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.

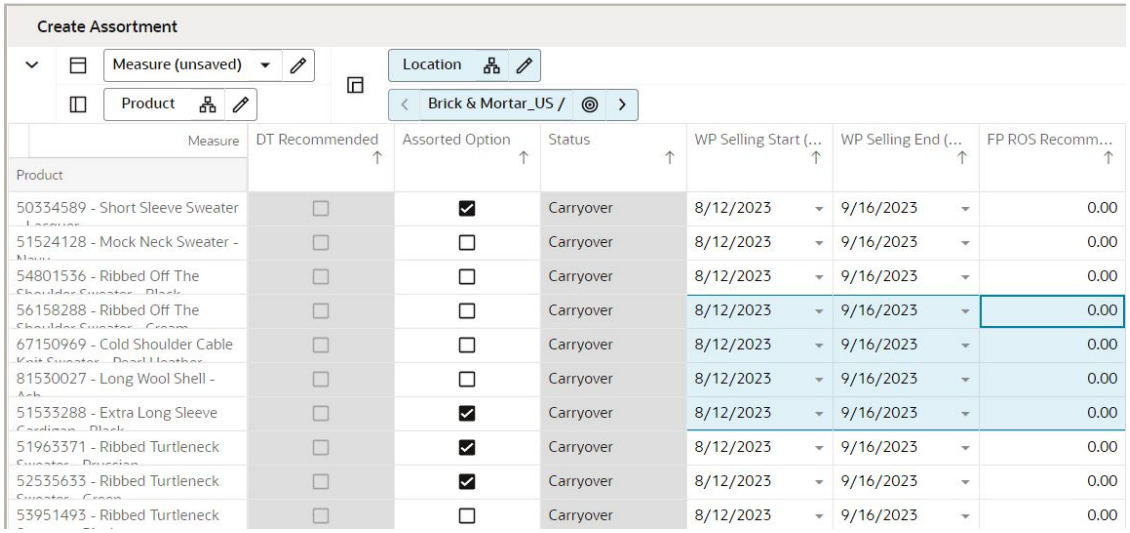
Selecting a Group of Contiguous Cells

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 5-51 Select a Group of Contiguous Cells



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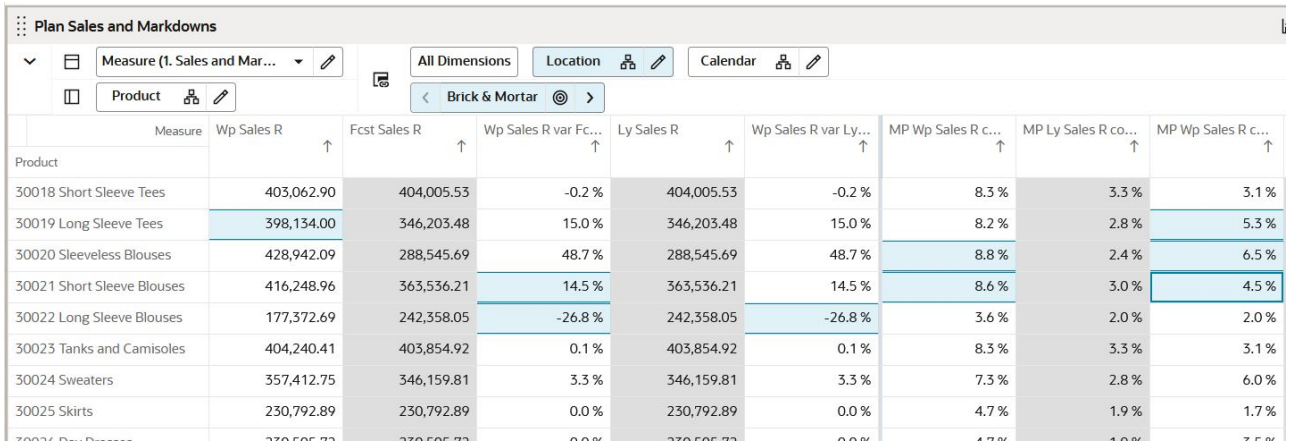
Selecting a Group of Non-Contiguous Cells

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 5-52 Select a Group of Non-Contiguous Cells



Product	Wp Sales R	Fcst Sales R	Wp Sales R var Fc...	Ly Sales R	Wp Sales R var Ly...	MP Wp Sales R c...	MP Ly Sales R co...	MP Wp Sales R c...
30018 Short Sleeve Tees	403,062.90	404,005.53	-0.2 %	404,005.53	-0.2 %	8.3 %	3.3 %	3.1 %
30019 Long Sleeve Tees	398,134.00	346,203.48	15.0 %	346,203.48	15.0 %	8.2 %	2.8 %	5.3 %
30020 Sleeveless Blouses	428,942.09	288,545.69	48.7 %	288,545.69	48.7 %	8.8 %	2.4 %	6.5 %
30021 Short Sleeve Blouses	416,248.96	363,536.21	14.5 %	363,536.21	14.5 %	8.6 %	3.0 %	4.5 %
30022 Long Sleeve Blouses	177,372.69	242,358.05	-26.8 %	242,358.05	-26.8 %	3.6 %	2.0 %	2.0 %
30023 Tanks and Camisoles	404,240.41	403,854.92	0.1 %	403,854.92	0.1 %	8.3 %	3.3 %	3.1 %
30024 Sweaters	357,412.75	346,159.81	3.3 %	346,159.81	3.3 %	7.3 %	2.8 %	6.0 %
30025 Skirts	230,792.89	230,792.89	0.0 %	230,792.89	0.0 %	4.7 %	1.9 %	1.7 %

Navigation Shortcuts for Editing Cells

When you are editing cells in a pivot view, you can use the navigation options listed in Table 5-2 to move to the next cell.

Table 5-2 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 Escape key to exit Editable mode and restore the previous value.

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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.

Checkbox (Toggle) Items

You can select the checkbox to change the status of the item (Yes or No; On or Off). This may be called a Boolean measure and provides capability for an active or a non-active user defined response.

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.

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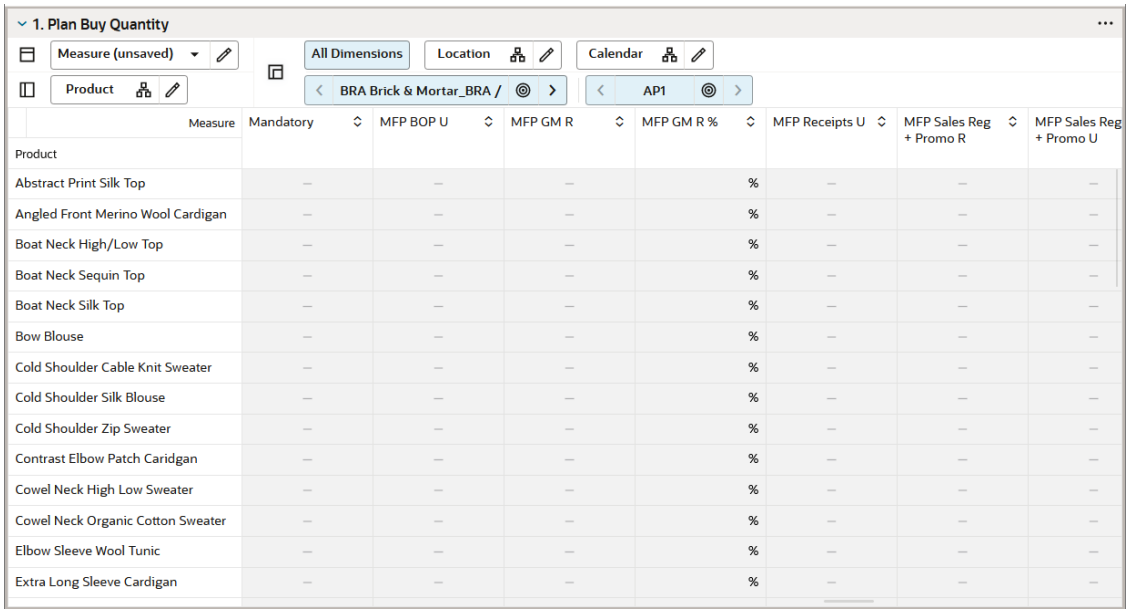
Undefined Cells

Cells with undefined values cannot be edited and are represented with symbol -. Hovering over these cells displays the message cells value undefined. This may indicate that the display is at the wrong intersection to display the cell value. You may adjust the display to reflect the correct product, location, or calendar intersection.

Figure 5-53 Cell Value Undefined



> **Note**
>
> When you clear a cell value, using either a delete key or backspace key, and then tab out of the cell; then the cell displays the measure's Special (SP) value. In this case, when the SP value is set to NULL for a measure, then the cell displays an empty or blank cell when deleted. This is applicable to String, Date, Numeric measure types. For Boolean and list measure types, you cannot delete the cell value.
>
> If a measure is configured to a NULL SP value, then the cell is empty. This applies to String, Date, Numeric, and SHS measure types. For Boolean and picklist measure types, a user cannot delete the cell value.

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:

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- 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 RPASCE Configuration Tools or through the formatting options in RPASCE. For more

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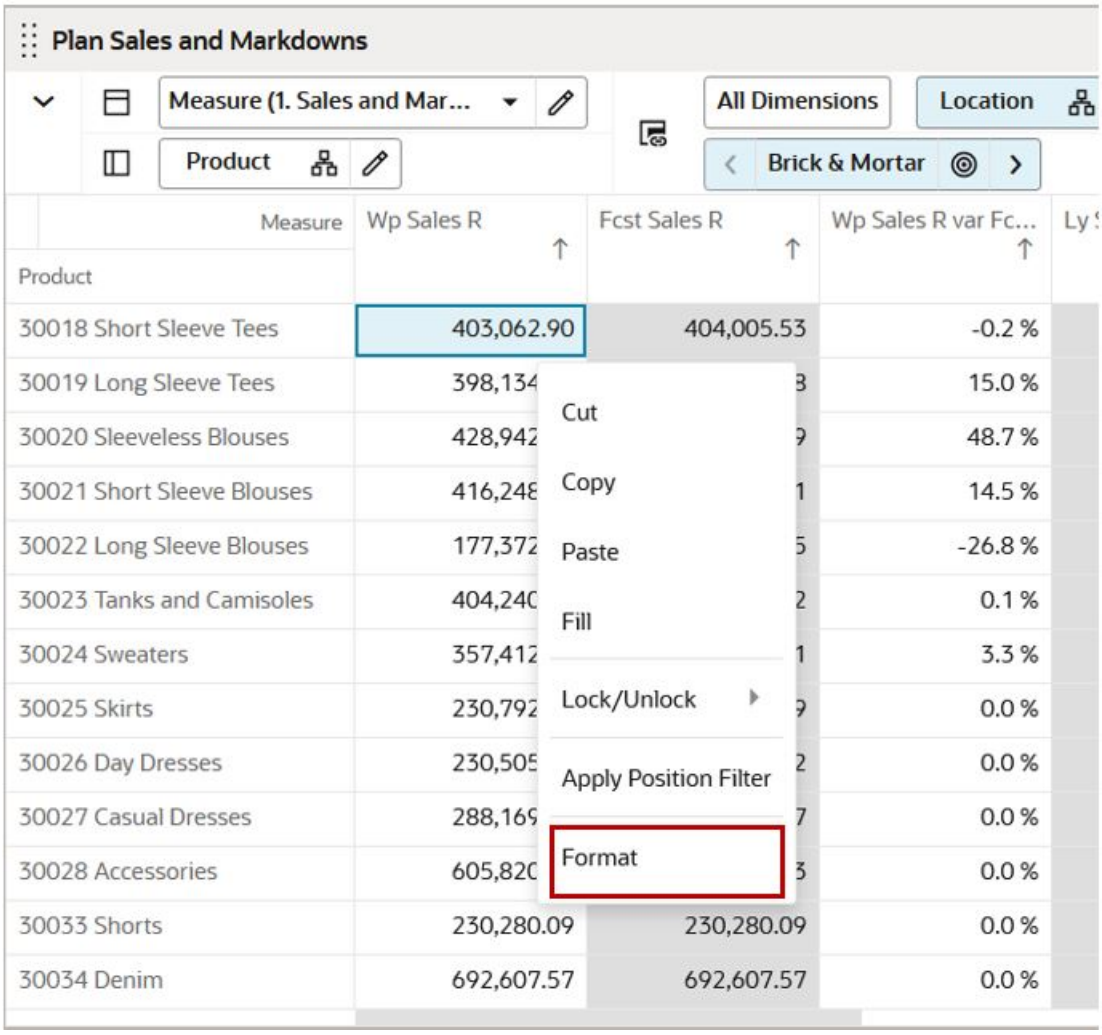
information about setting scaling factors in the Configuration Tools, see the Oracle Retail Predictive Application Server Cloud Edition documentation.

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

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

Figure 5-54 Formatting Measure Data



2. The Format window is displayed.
3. In Figure 5-54, the selected measure Wp Sales R is already selected and all the views in the current tab are selected.

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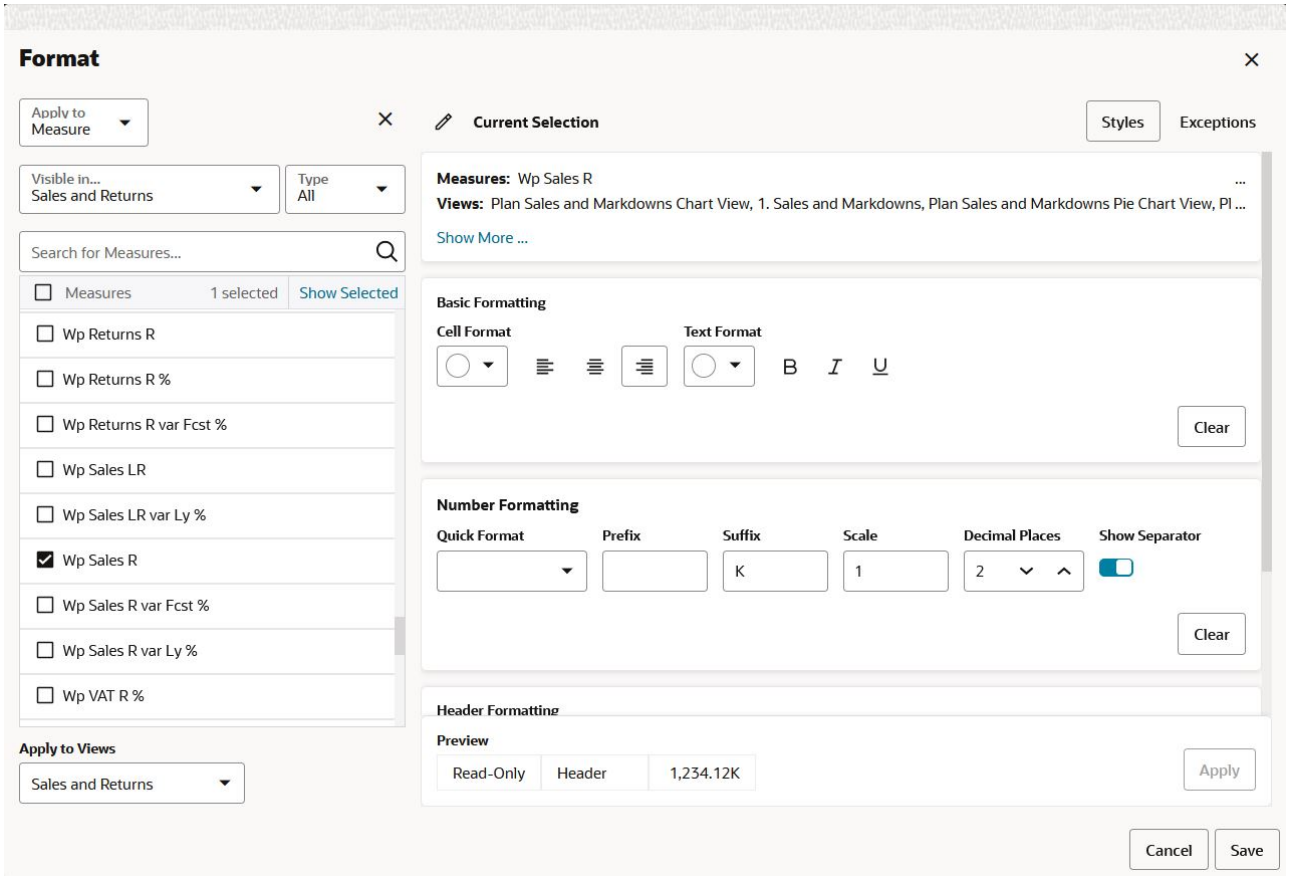
Figure 5-55 Format for Measure Wp Sales R



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.

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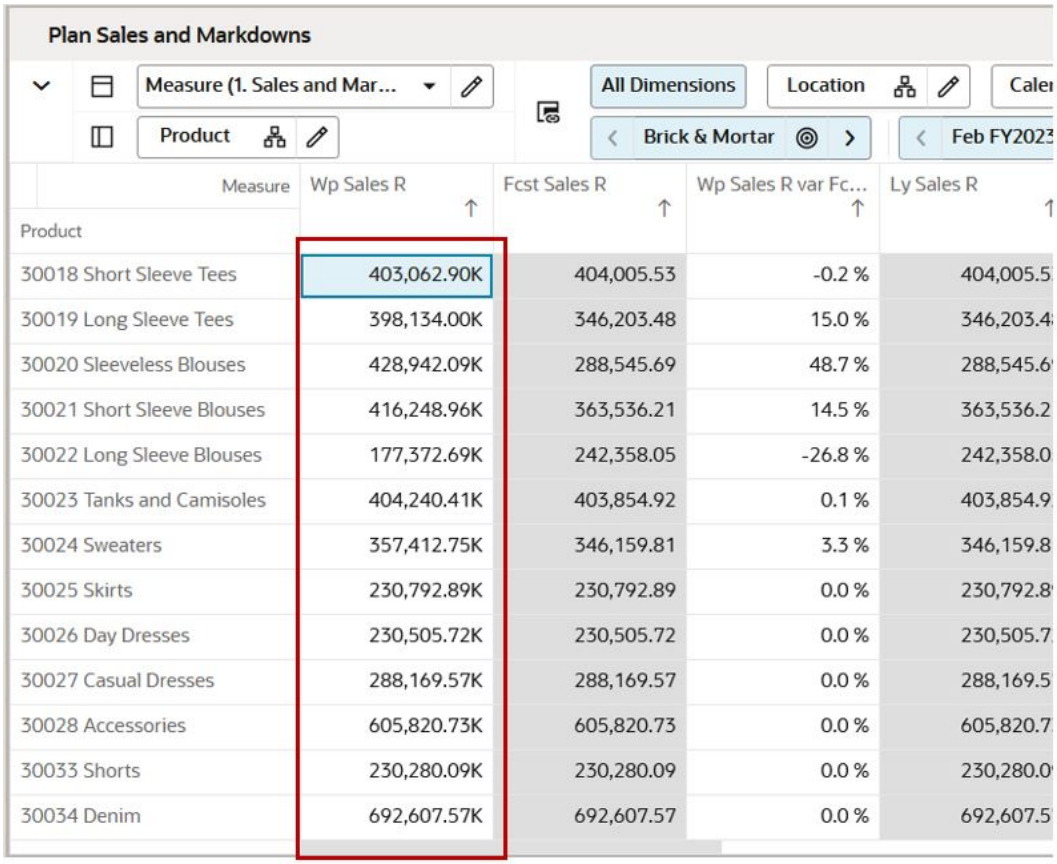
Figure 5-56 Scale Factor Values



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 with the Fill function. This enables you to edit multiple workbook cells with the same values easily and quickly. Fill is available as a menu item in the right-click context menu.

Perform the following steps to fill cells with the same value:

1. Select a source cell whose value you want to repeat in the other cells or block of cells. The source cell is always the top left cell of the first selection.

   A source cell can be the top left cell or any cell that is first selected out of multiple blocks.
2. Select the block of cells where you want to fill the value of the source cell. You can select either select consecutive or non-consecutive cells or block of cells per your requirements.
3. Right-click one of the selected cells and select **Fill** from the context menu.
4. The value of the source cell is copied to all the other selected cells or block of cells.

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Figure 5-57 Fill Cell

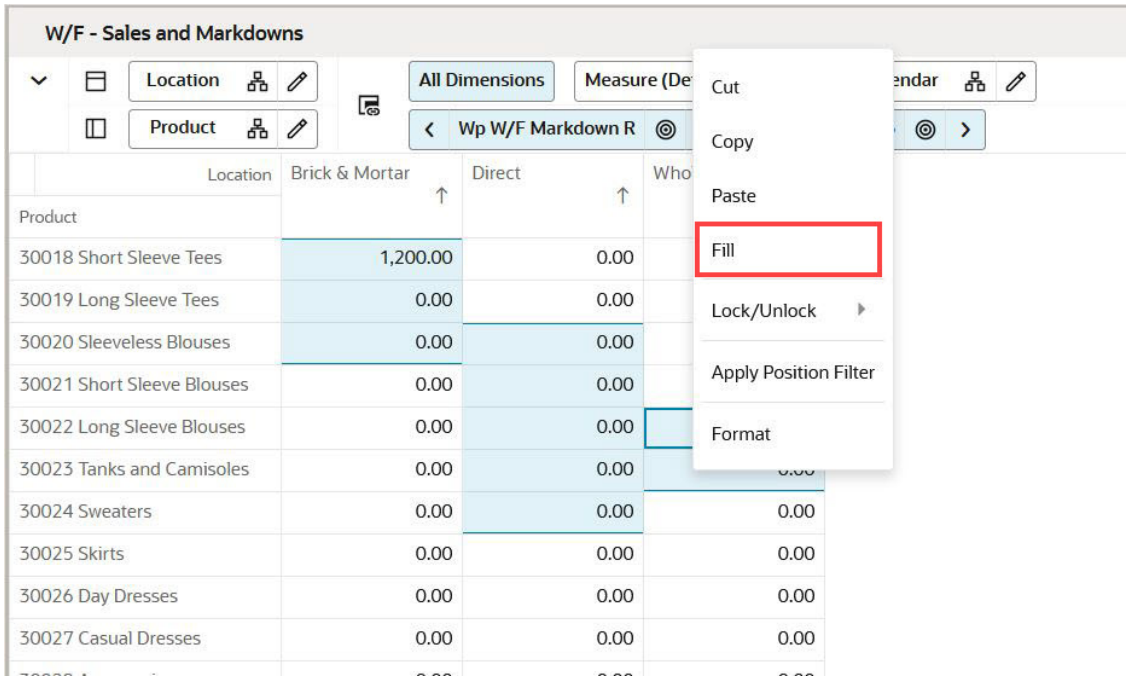
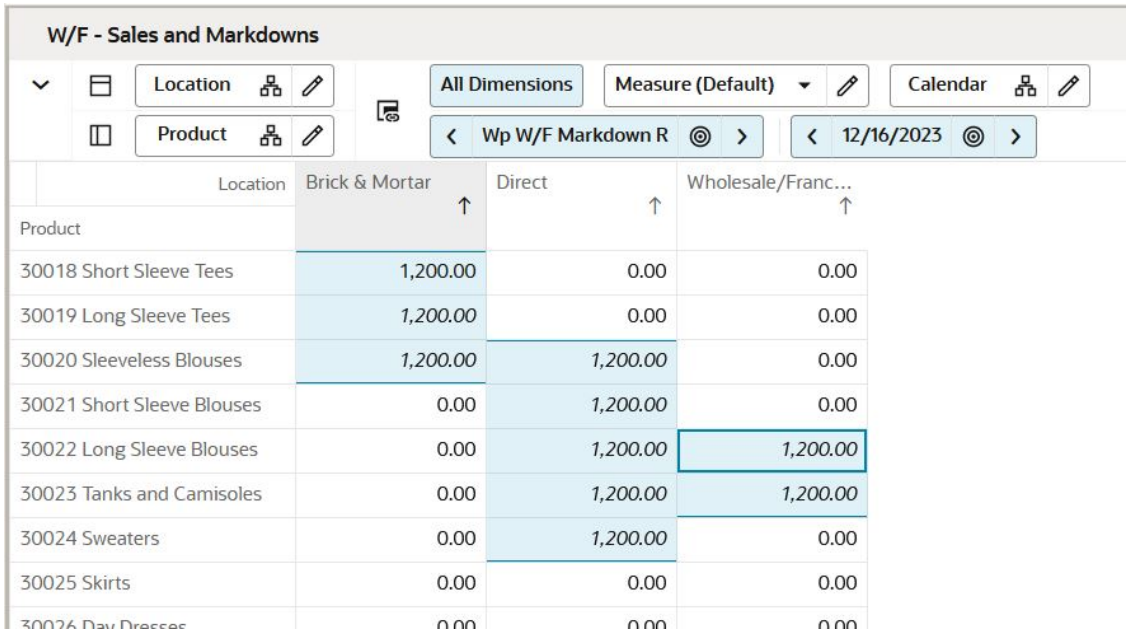


Figure 5-58 Selected Cells Filled with Source Cell Value



> **Note**
>
> The locked, read-only, protected and invalid data types cells will be skipped during fill.

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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.

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 5-3, 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 5-3 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

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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 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 (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 result 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

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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
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

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Measure	Sales U
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 Sales AUR = Sales R / Sales U. Hence, at month A level Sales AUR = 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 checkbox).

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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

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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

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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	Updated To	Measure	Sales U
Month A	795		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

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Measure	Sales U
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.

> **Note**
>
> The spread methods of *r*,*e*,*p*, and *d* must be typed as lower case letters.

The alternate spread methods are listed in the following table.

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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, RPASCE also provides a locking function in order to protect information. The locking function can be used on cells, measures, and positions. To continue with the above example, if you lock the Month Total for January and then increase the value of week 1 Regular Sales, the January Month Total will not change because it is locked, but the other weeks of January will be decreased.

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

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

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

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

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Cell Locking

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

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

The locked status of a cell is indicated by the presence of a picture of a lock on the left side of the cell. After an eligible cell is locked, the system determines whether the remaining table cells are eligible or ineligible for locking. Any read/write cells that become ineligible for locking are made read-only.

You may choose to lock a data cell at any time to protect that cell from forced recalculations as a result of data manipulation elsewhere in the workspace.

For example, you may want to 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**.

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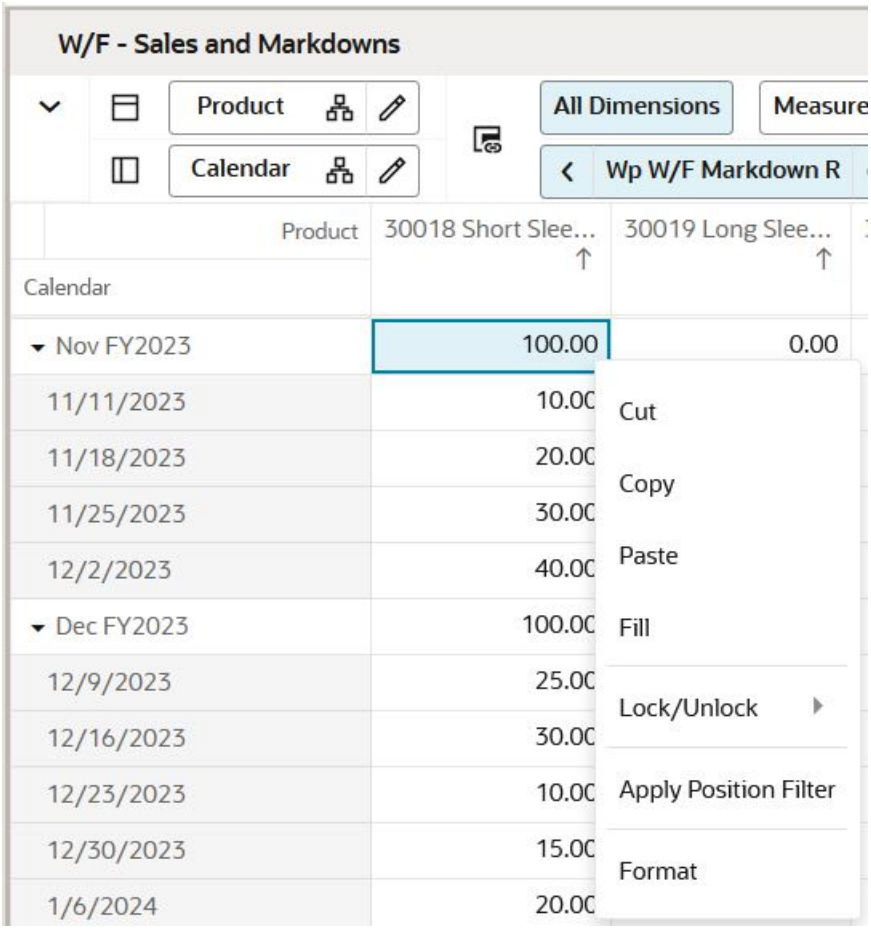
Figure 5-59 Lock Month Level Cell



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

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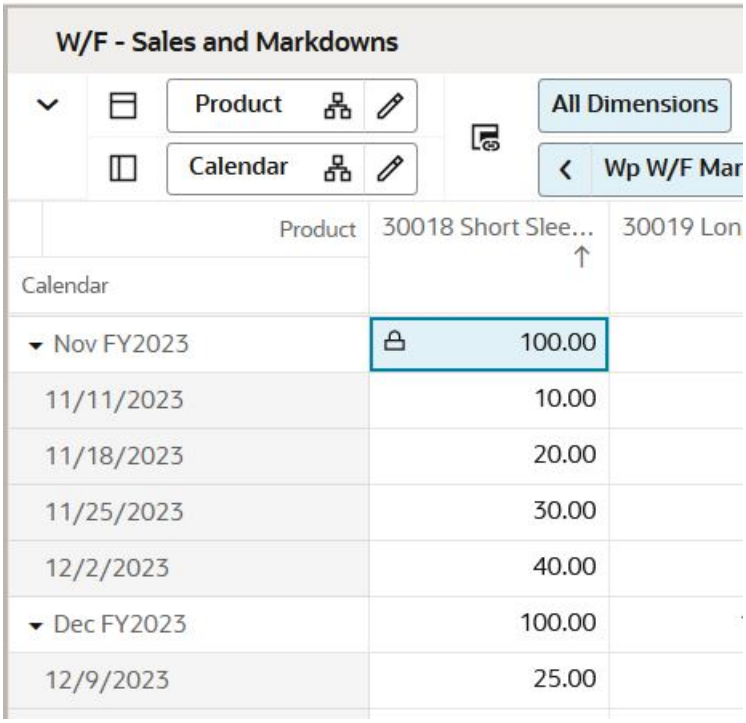
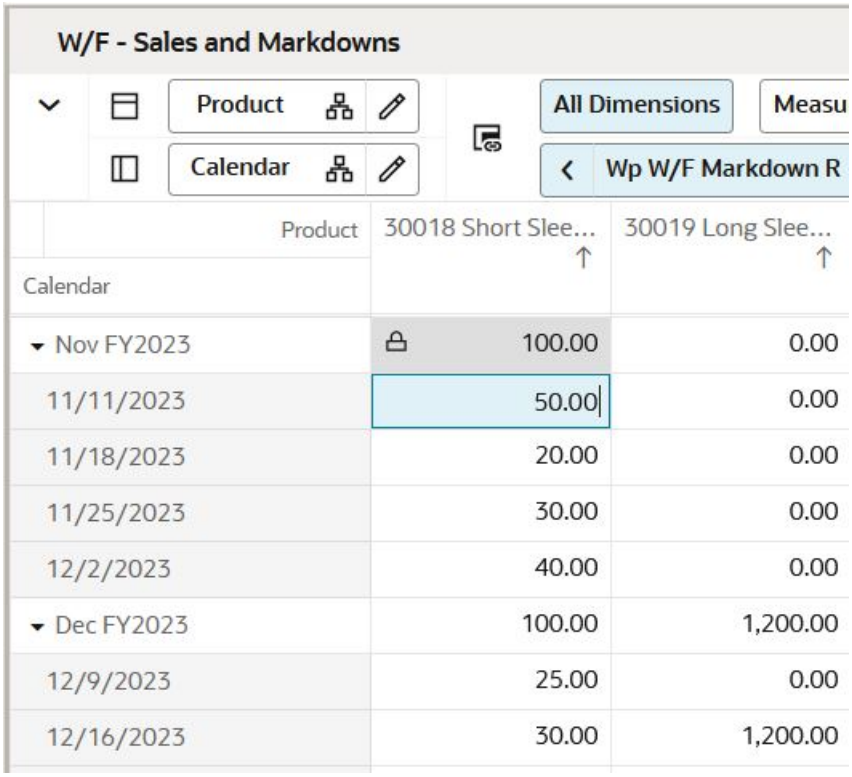
Figure 5-60 Lock Cell Lock Icon



3. Increase the first week of the month.

Figure 5-61 Increase the First Week



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

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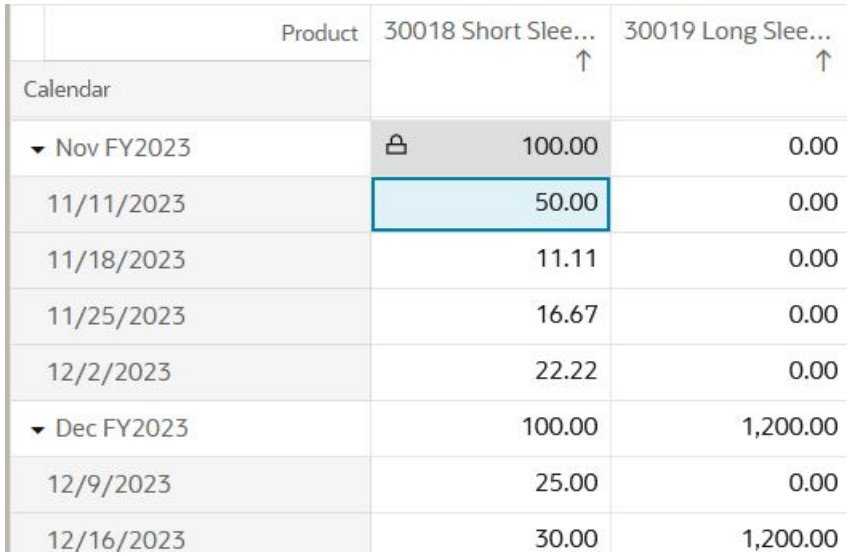
Figure 5-62 Calculation Results



Product / Calendar	30018 Short Slee...	30019 Long Slee...
Nov FY2023	100.00	0.00
11/11/2023	50.00	0.00
11/18/2023	11.11	0.00
11/25/2023	16.67	0.00
12/2/2023	22.22	0.00
Dec FY2023	100.00	1,200.00
12/9/2023	25.00	0.00
12/16/2023	30.00	1,200.00

Unlocking Cells

Unlocking the cells allows them to become editable again. To unlock a cell, right-click the locked cell and click **Unlock Cells**.

To unlock more than one cell simultaneously, either:

- Right-click the selected locked cells and click **Unlock All Cells**
- Select the locked cells and unlock them from the global menu.

Measure Locking

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

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

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

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

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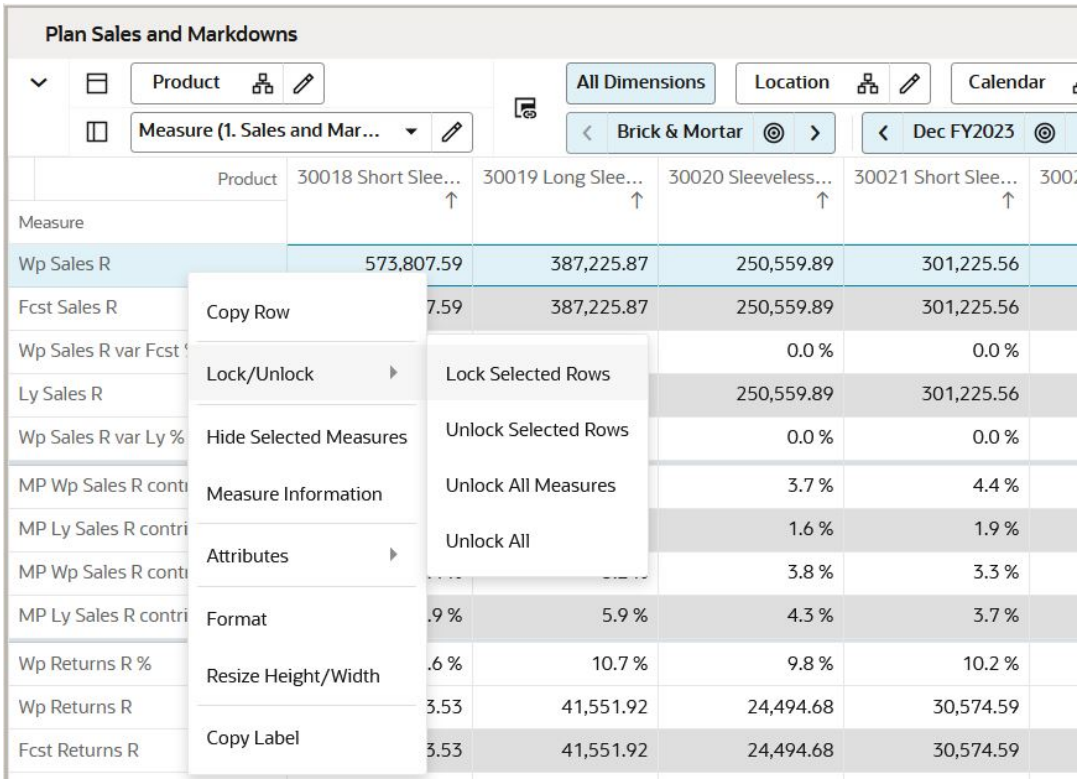
Measure Locking Example

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 5-63 Lock Entire Measure



2. 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.

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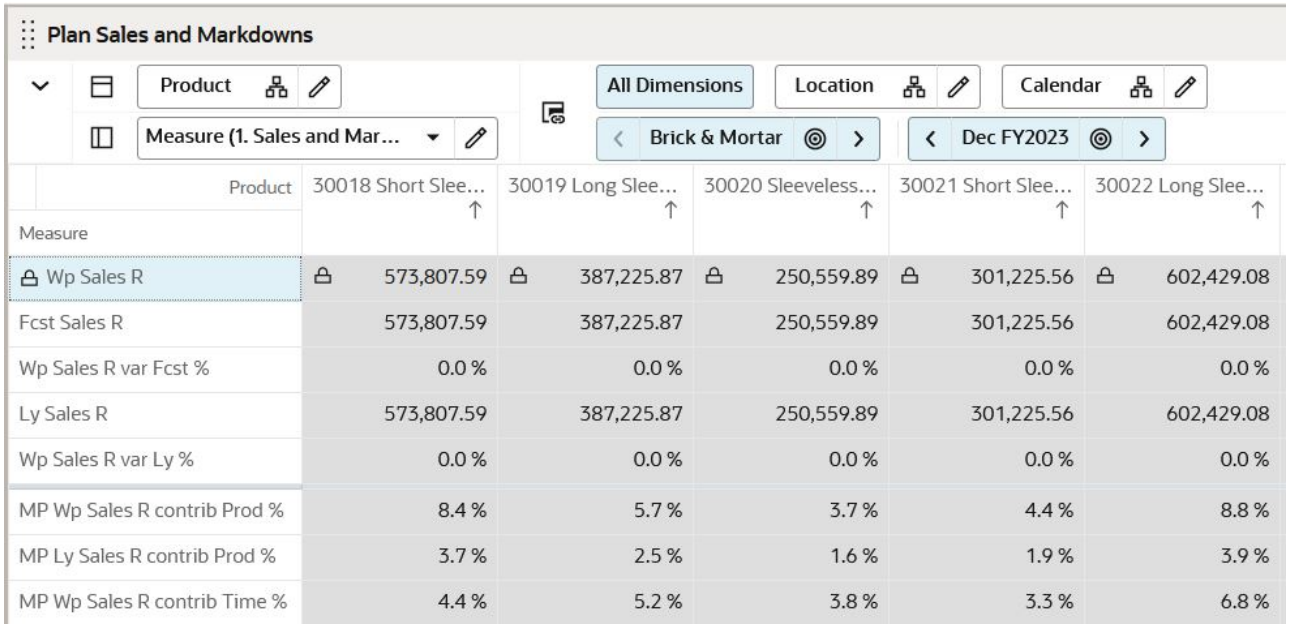
Figure 5-64 Entire Measure Locked



Measure	Product: 30018 Short Slee...	30019 Long Slee...	30020 Sleeveless...	30021 Short Slee...	30022 Long Slee...
Wp Sales R	573,807.59	387,225.87	250,559.89	301,225.56	602,429.08
Fcst Sales R	573,807.59	387,225.87	250,559.89	301,225.56	602,429.08
Wp Sales R var Fcst %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Ly Sales R	573,807.59	387,225.87	250,559.89	301,225.56	602,429.08
Wp Sales R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
MP Wp Sales R contrib Prod %	8.4 %	5.7 %	3.7 %	4.4 %	8.8 %
MP Ly Sales R contrib Prod %	3.7 %	2.5 %	1.6 %	1.9 %	3.9 %
MP Wp Sales R contrib Time %	4.4 %	5.2 %	3.8 %	3.3 %	6.8 %

Unlocking Measures

Unlocking the measures allows them to become editable again. To unlock a measure, right-click the locked measure and click **Unlock Selected Row**. To unlock more than one measure simultaneously, either:

- Right-click the locked measures and click **Unlock All Measures**
- Select the locked measures and unlock them from the global menu.

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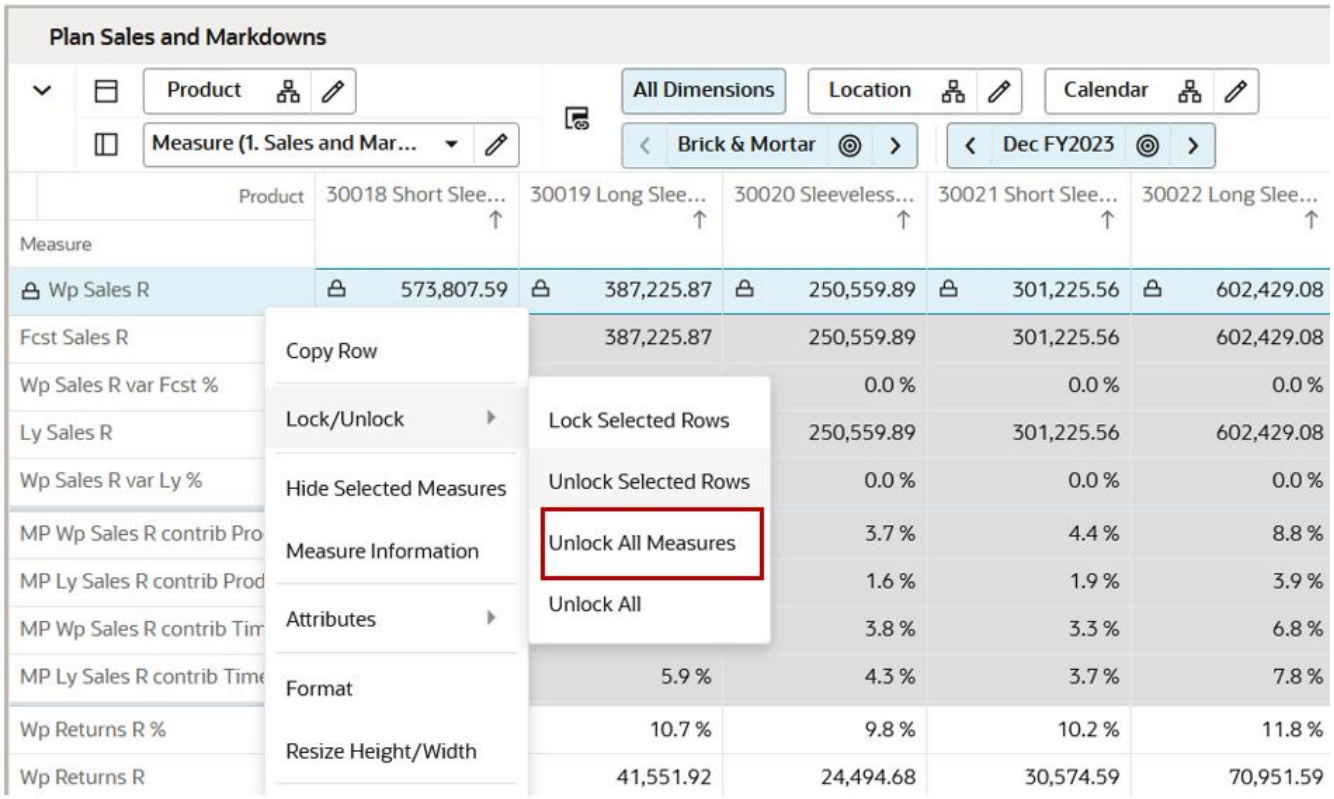
Figure 5-65 Unlocking All Measures



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.

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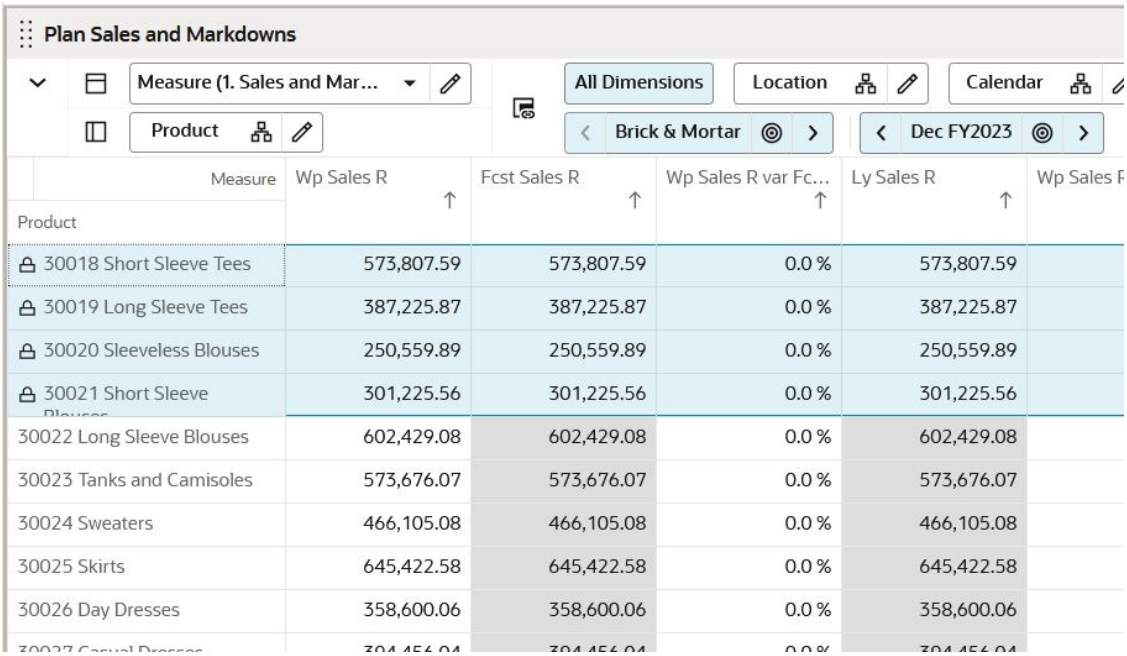
Figure 5-66 Locked Positions



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

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

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

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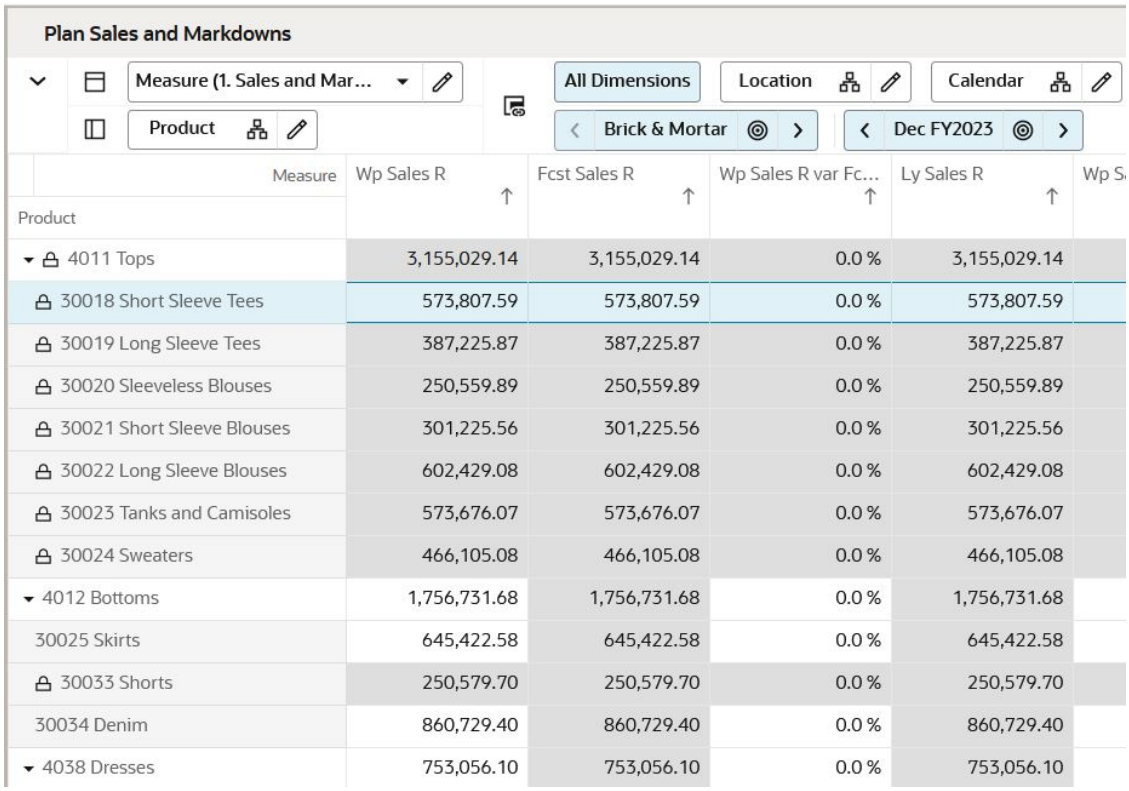
Figure 5-67 Locked Subclass



Product	Measure: Wp Sales R	Fcst Sales R	Wp Sales R var Fc...	Ly Sales R	Wp S
4011 Tops	3,155,029.14	3,155,029.14	0.0 %	3,155,029.14	
30018 Short Sleeve Tees	573,807.59	573,807.59	0.0 %	573,807.59	
30019 Long Sleeve Tees	387,225.87	387,225.87	0.0 %	387,225.87	
30020 Sleeveless Blouses	250,559.89	250,559.89	0.0 %	250,559.89	
30021 Short Sleeve Blouses	301,225.56	301,225.56	0.0 %	301,225.56	
30022 Long Sleeve Blouses	602,429.08	602,429.08	0.0 %	602,429.08	
30023 Tanks and Camisoles	573,676.07	573,676.07	0.0 %	573,676.07	
30024 Sweaters	466,105.08	466,105.08	0.0 %	466,105.08	
4012 Bottoms	1,756,731.68	1,756,731.68	0.0 %	1,756,731.68	
30025 Skirts	645,422.58	645,422.58	0.0 %	645,422.58	
30033 Shorts	250,579.70	250,579.70	0.0 %	250,579.70	
30034 Denim	860,729.40	860,729.40	0.0 %	860,729.40	
4038 Dresses	753,056.10	753,056.10	0.0 %	753,056.10	

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, access the right-click context menu on the header of the position.
2. Click **Lock/Unlock**, then select either the **Lock Selected Columns** or **Lock Selected Rows** option.
3. The entire measure or position is now locked and the Lock icon appears in the header of the locked position, but not each cell.

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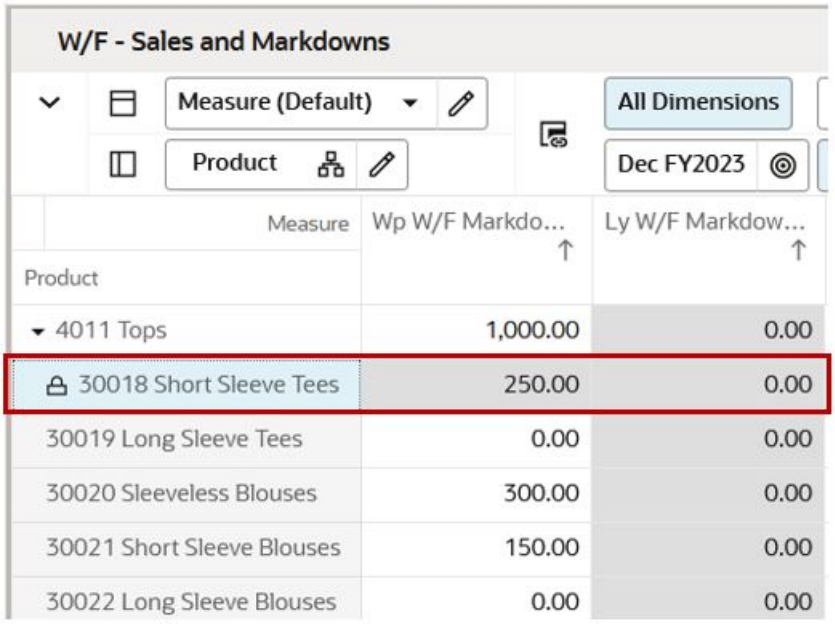
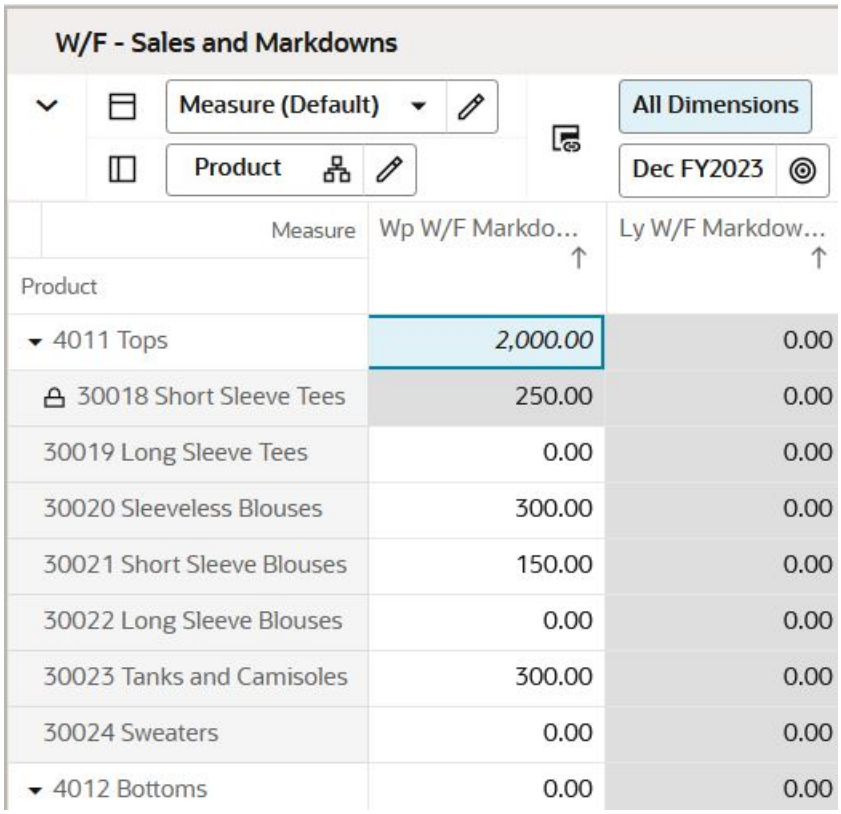
Figure 5-68 Entire Product Position Locked



4. Increase the subclass level value.

Figure 5-69 Increase the Subclass Level Value



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

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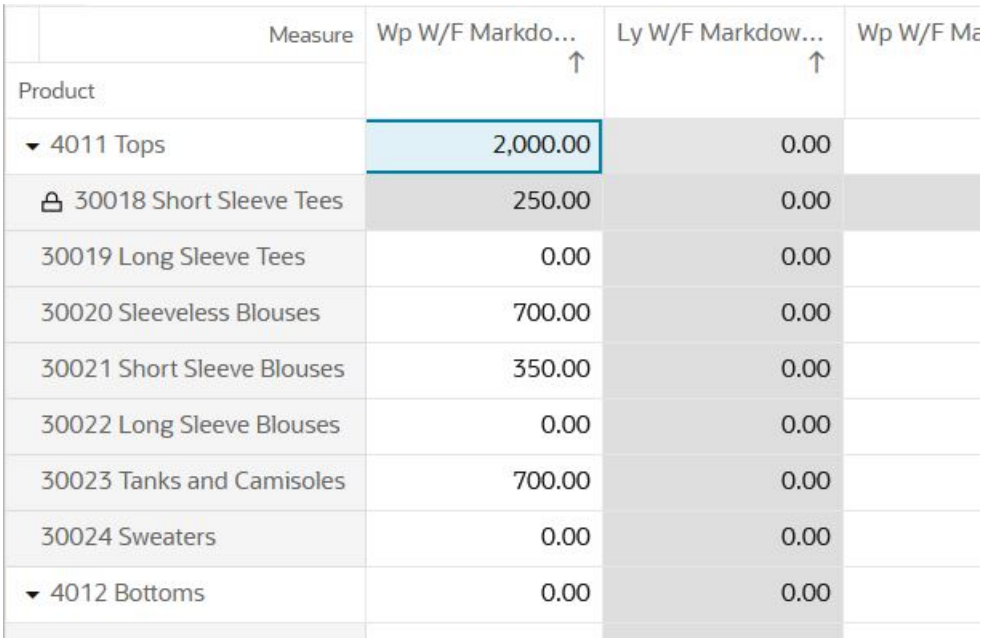
Figure 5-70 Calculation Result



Measure / Product	Wp W/F Markdo...	Ly W/F Markdow...	Wp W/F Ma
4011 Tops	2,000.00	0.00	
30018 Short Sleeve Tees	250.00	0.00	
30019 Long Sleeve Tees	0.00	0.00	
30020 Sleeveless Blouses	700.00	0.00	
30021 Short Sleeve Blouses	350.00	0.00	
30022 Long Sleeve Blouses	0.00	0.00	
30023 Tanks and Camisoles	700.00	0.00	
30024 Sweaters	0.00	0.00	
4012 Bottoms	0.00	0.00	

Unlocking Positions

Unlocking a locked position allows it to become editable again. To unlock a position, right-click the locked position and click **Unlock Selected Row**. To unlock more than one position simultaneously, either:

- Right-click the locked positions and click **Unlock All Positions**
- Select the locked positions and unlock them from the global menu.

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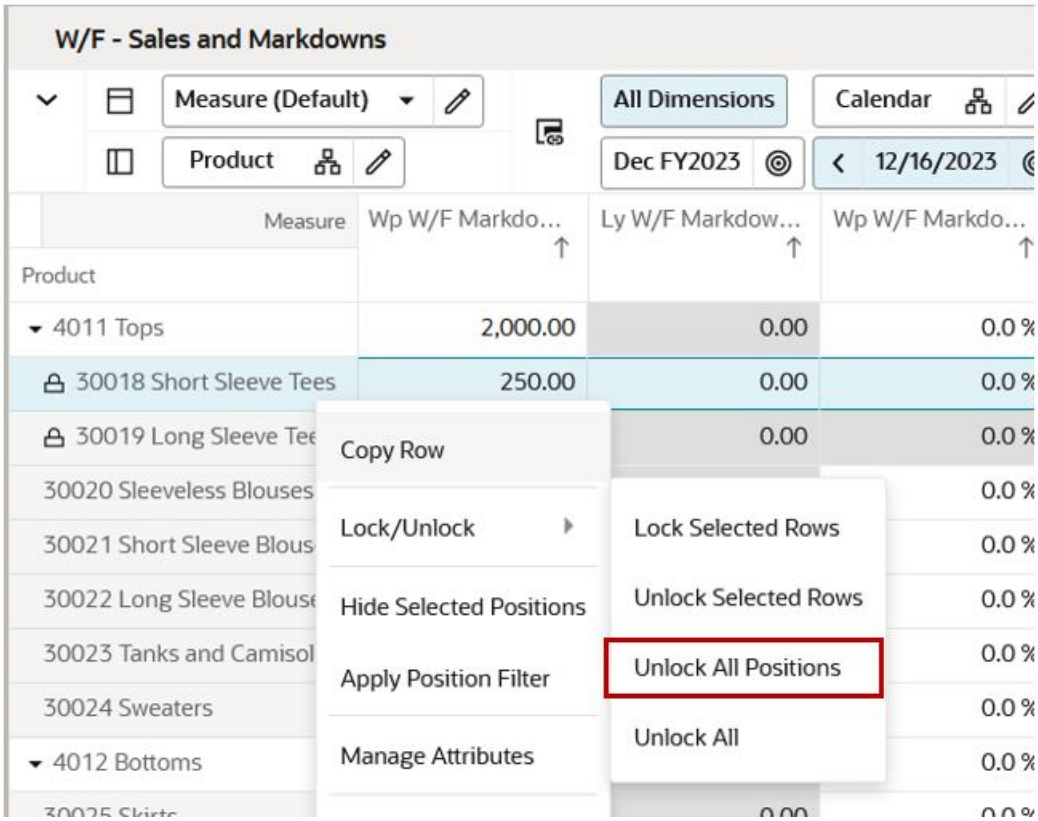
Figure 5-71 Unlocking All Positions



Unlock All

You can unlock all cells, measures and positions by using **Unlock All**. This function unlocks all the cells, measures, and positions simultaneously across the view.

Access **Unlock All** from either the right-click context menu or the global menu.

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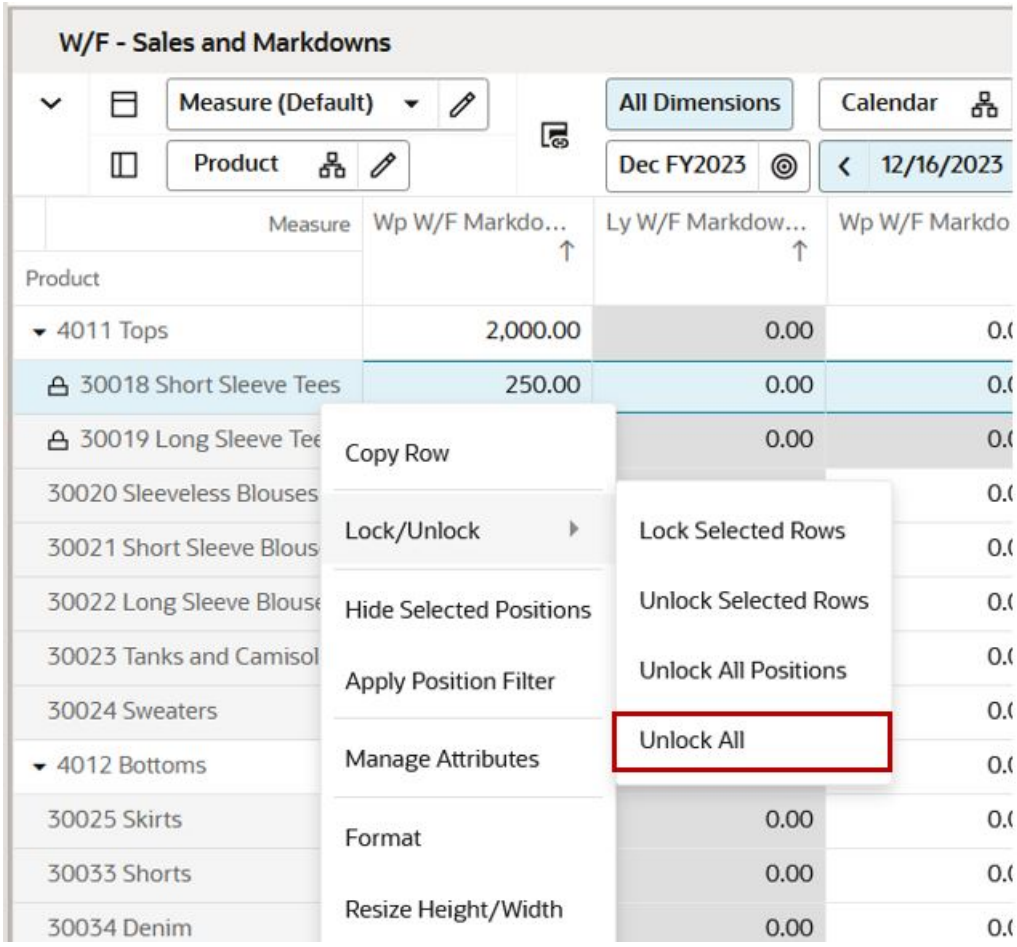
Figure 5-72 Unlocking All Cells, Measures, and Positions



Protection Processing

Protection processing is the process that makes some cells within a workbook read-only to ensure that, during edits, no conflicts occur within the RPASCE engine 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:

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- 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.

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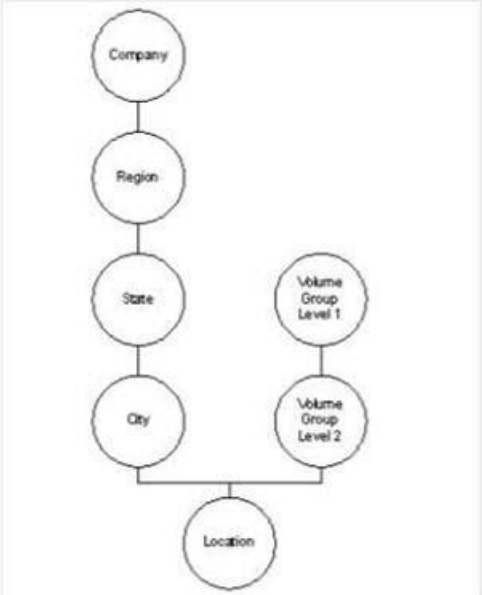
Figure 5-73 Location Dimension



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 RPASCE as well as transferring data to and from RPASCE and external application (such as, Notepad, Excel, Google Sheets, and so on).

Table 5-4 Cut, Copy and Paste Functionality

Function	Description	Shortcut
Cut	Allow users to copy data and reverts the cell values to NA values from the selected view and then moves it to another location within RPASCE or an external application.	**Ctrl+X**
Copy	Allows users to copy data from a selected view and move it to another location within RPASCE 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 RPASCE or external application.	**Ctrl+V**

Using Cut, Copy and Paste Functionality for Cells

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

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- 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 **Ctrl+X**, **Ctrl+C**, and **Ctrl+V** allows you to cut, copy, paste data respectively within RPAS as well as between RPASCE and an external application. This allows you to copy and paste data for cells at selected level of cells.
- You can copy and paste the cells data within RPASCE at the base intersection level by using the keyboard shortcut command Ctrl+Atl+D and Ctrl+Atl+B. For more details on using copy and paste at the base intersection level, refer to Copying Data and Pasting Data.
- You can use the right-click context menu copy Paste feature to copy paste data between cells. It allows you to cut,copy, and paste data within RPASCE.

  The context menu Copy Paste can also be used in mobile devices like tablets where keyboards 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 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.

Using Shortcut Command Functionality for Cells

Perform the following steps to use the shortcut commands; cut, copy, and paste 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 **Ctrl+X** .
   b. Copy the data using **Ctrl+C**. When cells are copied, only textual content is transferred.

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Figure 5-74 Selecting the Cell to Copy or Cut with a Shortcut

3. To paste the data from the clipboard, select the destination cell (either within RPASCE or external application) and use **Ctrl+V** for Paste.

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

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Figure 5-75 Select the Destination Cell and use the Paste Shortcut

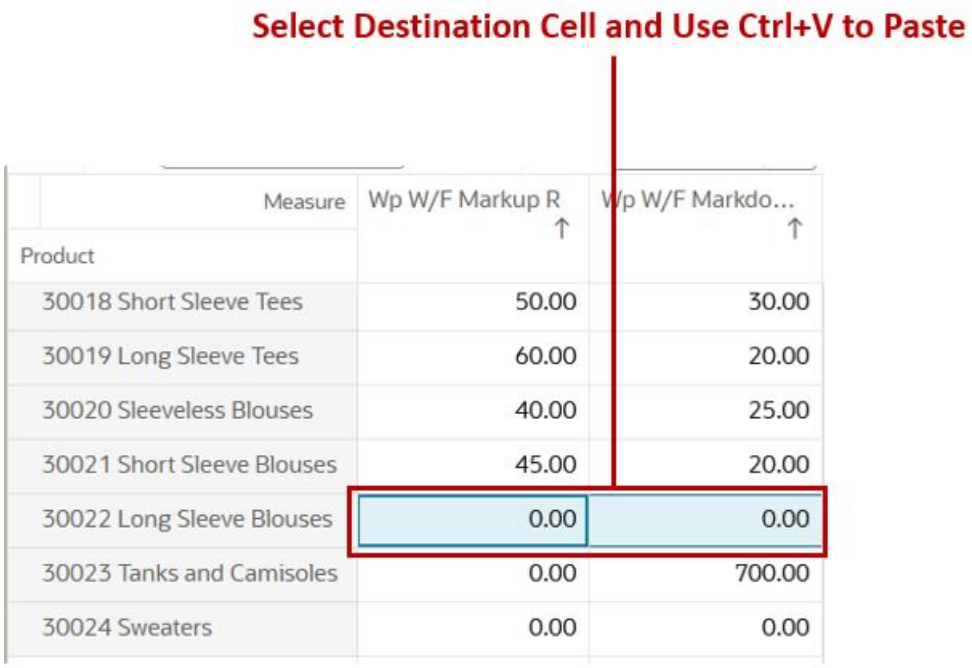

Figure 5-76 The Paste Result

Using Right-click Cut, Copy, and Paste Functionality for Cells

You can also use right-click context menu option to Cut and Copy Paste data between cells. This feature is also used in mobile devices like tablets.

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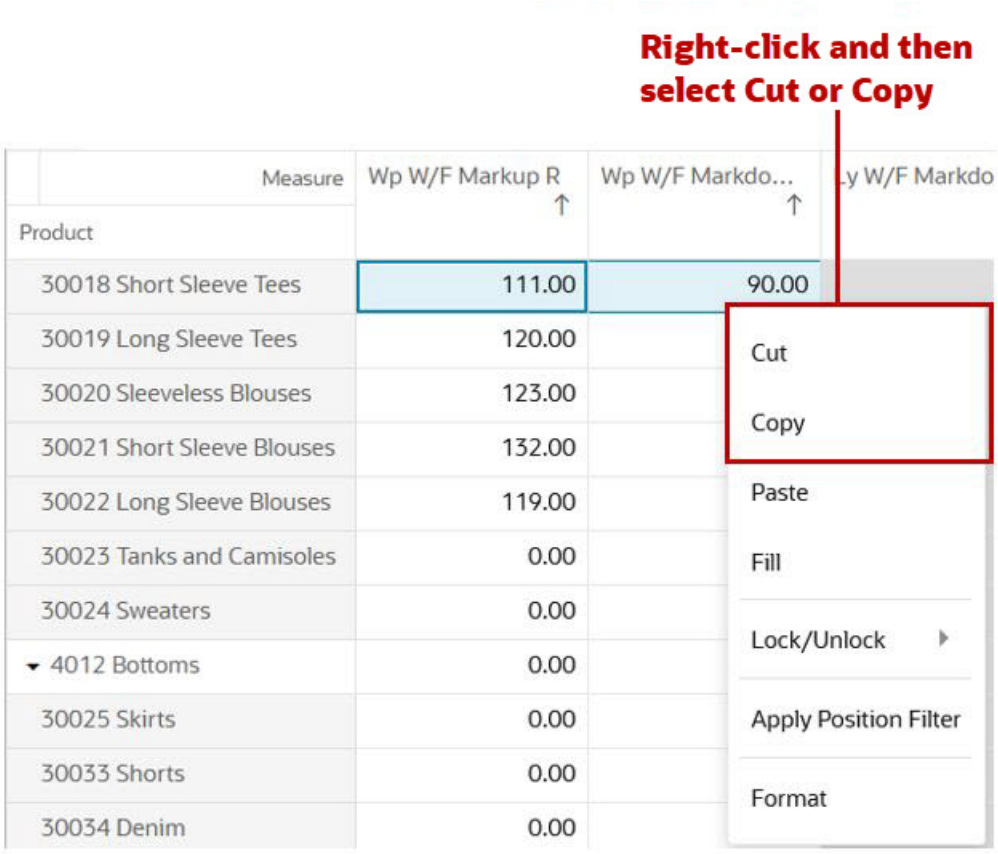
Perform the following steps to use the right-click functions; cut, copy, and paste for cells.

1. Select all the data cells that you need to either cut or copy.
2. Either cut or copy the data to the clipboard.
   - Cut the data using right-click functionality
   - Copy the data using right-click functionality. When cells are copied, only textual content is transferred.

Figure 5-77 Selecting Cells to Copy or Cut with Right-click Functionality



3. To paste the data, select the destination cell and use right-click functionality to **Paste**.

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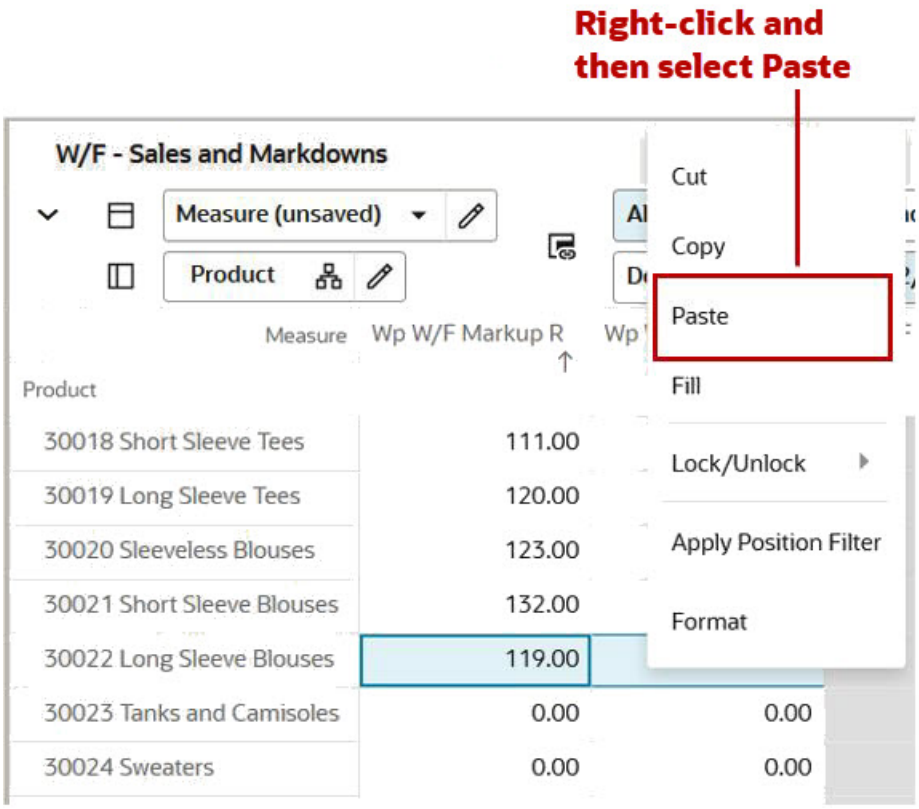
Figure 5-78 Select the Destination Cell and use the Right-click Functionality



> **Note**
>
> Cut or copied data displays in an italicized font until calculated.

Figure 5-79 The Paste Result

Measure / Product	Wp W/F Markup R	Wp W/F Markdo...
30018 Short Sleeve Tees	111.00	90.00
30019 Long Sleeve Tees	120.00	98.00
30020 Sleeveless Blouses	123.00	102.00
30021 Short Sleeve Blouses	132.00	129.00
30022 Long Sleeve Blouses	*111.00*	*90.00*
30023 Tanks and Camisoles	0.00	0.00
30024 Sweaters	0.00	0.00

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Using Copy and Paste Functionality for Columns and Rows

RPASCE provides two ways to copy and paste column or row headers:

- Context menu (right-click to access)
- Keyboard shortcuts

Both of these functionalities have the distinct purpose of copy and paste.

Using the Context Menu to Copy and Paste

Access the context menu through right-click functionality. The copy and paste column or row header functionality allows you to transfer data at the lowest intersection level while viewing the data at aggregated level within the pivot table. This functionality is known as copy and paste special from earlier versions of RPASCE.

You can copy and paste data at the base level without editing the position hierarchy to child level. This is useful, for example, when a planner wants to copy and paste LY sales data to WP sales data at the style/color level while viewing the data sub class product level by using the context menu for copy and paste.

> **Warning**
>
> The context menu copy and paste options, ***Copy Column*** and ***Copy Row*** perform a permanent change that cannot be undone since the data is copied to server and not to clipboard.

Copying Data

Both the context menu and keyboard shortcuts allow you to copy data at two levels:

- **Copy at Selected Level**—Allows you to copy at the level which is displayed in the pivot table. This level can be either base level or an aggregated (parent) level which is rolled up in hierarchy.
  - The keyboard shortcut for copying at selected level is **Ctrl+Alt+C**.
- **Copy at Base Intersection Level**—Allows you to copy at the base intersection level while viewing the data at an aggregate level / parent level. If multiple levels are present on the pivot table, it copies data from the lowest level intersection.
  - The keyboard shortcut for copying at base intersection level is **Ctrl+Alt+D**.

This option is available for copy functionality:

Always copy at this level—This option enables you to choose one level at which you need to copy data. When you select the option, you will not see the copy window appearing. You can make changes to the selection from User Preferences. For more details on User Preference, refer to the section, User Preference within the Special Features chapter.

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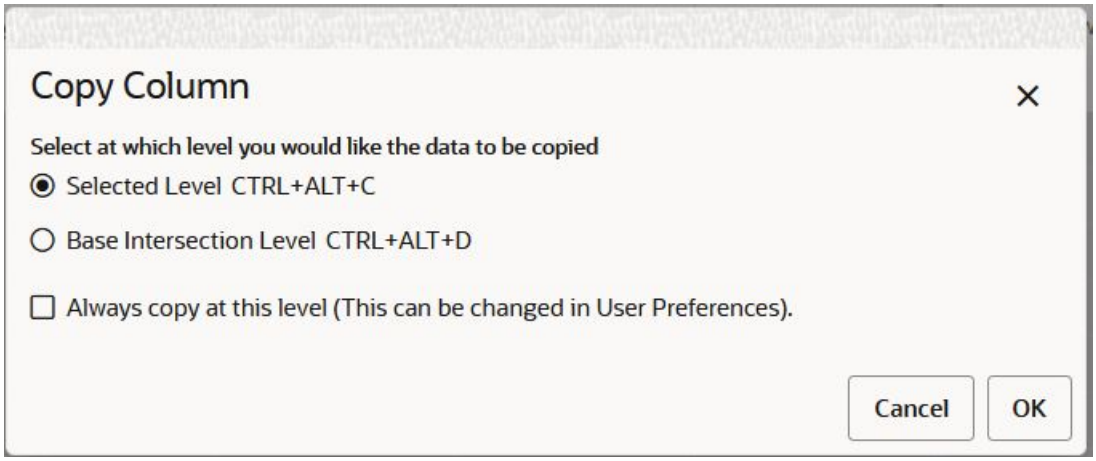
Figure 5-80 Selecting Data Level to Copy



Pasting Data

Both the context menu and keyboard shortcuts allow you to paste data at two levels:

- **Paste at Selected Level**—Allows you to paste at the level which is displayed in the pivot table. This level can be either base level or an aggregated (parent) level which is rolled up in hierarchy.
  - The keyboard shortcut for pasting at the selected level is **Ctrl+Alt+V**.
- **Paste at Base Intersection Level**—Allows you to paste at base intersection level while viewing the data at an aggregate level / parent level. If multiple levels are present on the pivot table, it copies data from the lowest level intersection.
  - The keyboard shortcut for pasting at base intersection level is **Ctrl+Alt+B**.

These options are available for paste functionality:

- **Do not Paste NA values**—Allows you to skip missing values while pasting the data. Missing values are represented by the symbol NA (Not Available).
- **Always Paste at this level**—This option enables you to choose one level at which you need to paste data. When you select the option, you will not see the copy window appearing. You can make change to the selection from User Preferences functionality.

  For more details on User Preference, refer to the section, User Preference within the Special Features chapter.
- **Automatically accept column/row paste without confirmation**—This option enables you to accept the confirmation on permanent changes done by column or row pasting. Selecting this option prevents the confirmation message, *Changes made by pasting an entire column or row are permanent and cannot be undone*, from displaying for the rest of the session. To have the confirmation display again, you can make changes in the User Preference Functionality.

  For more details on User Preference, refer to the section, User Preference within the Special Features chapter.

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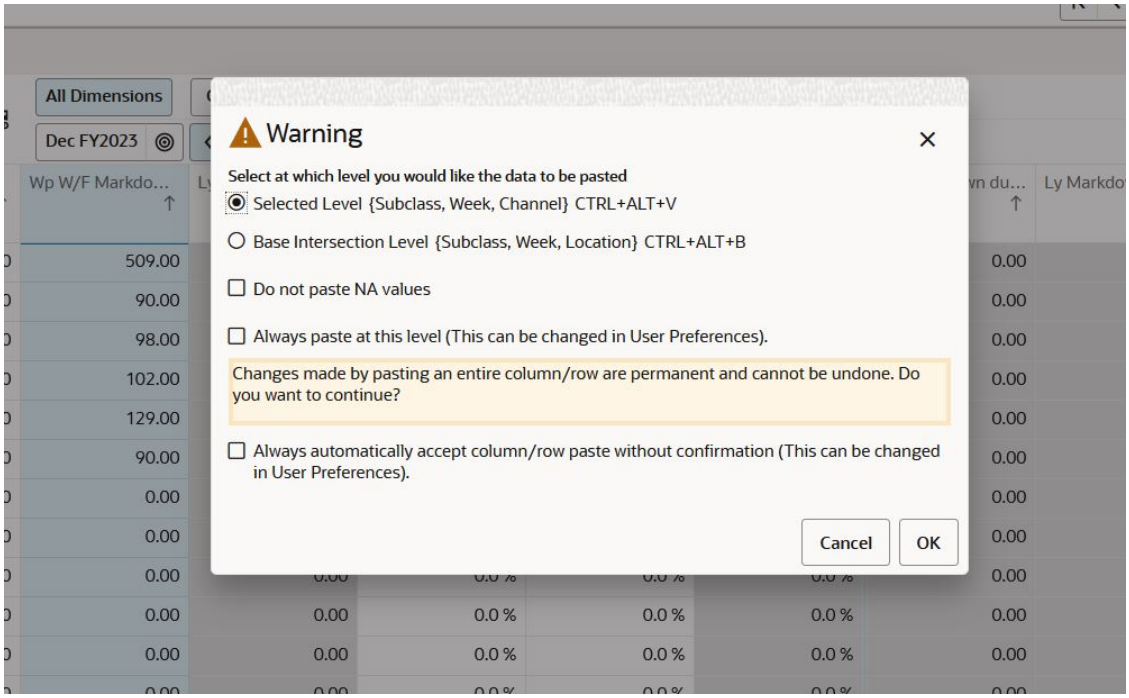
Figure 5-81 Selecting Data Level to Paste



Key Points when Using Copy and Paste from the Context Menu

Follow these points when using the context menu for copy and paste:

- Context menu selections for Copy Column and Copy Row perform a permanent change that cannot be undone since the data is copied to server and not to clipboard.
- RPASCE allows multiple column or rows to be copied and pasted within the application.

  The number of columns and rows selected for copy should be same as the number of columns and rows selected for paste. Copy and paste will not work when the column to column or row to row numbers are different.
- Restricted cell data is skipped for column and row copy and paste.
  - Restricted cell data includes data for read only cells, locked cells, protected cells, and format mismatch
- Copy and paste for a non–contiguous selection of multiple rows and/or columns is not recommended. The paste result may differ from your expected result. For more details about non- contiguous rows or columns, refer to Selecting a Group of Non-Contiguous Cells.

If the Data is Copied at the...	And Pasted at the...	It Results in...
Parent level	Base level	Pasting the same values for all of the child levels. The parent value at the destination is derived from aggregation method.
Parent level	Parent level in destination	The pasted value is spread to all the child level using the spread method.

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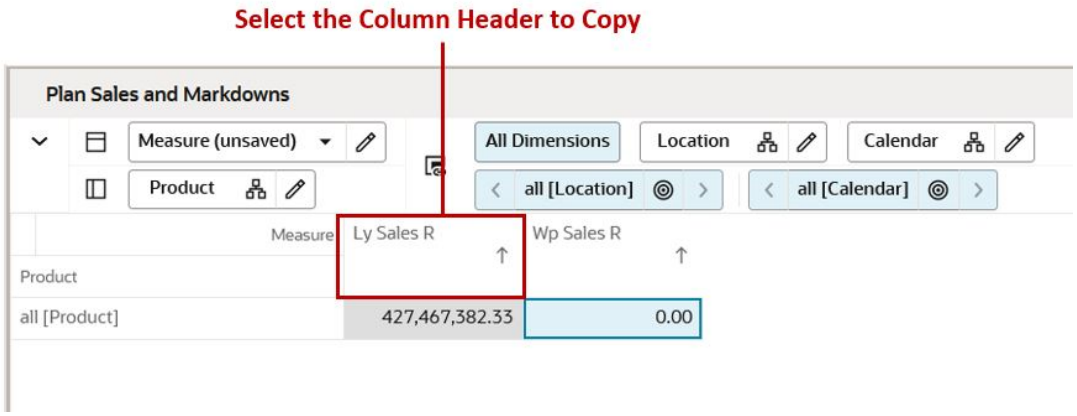
If the Data is Copied at the...	And Pasted at the...	It Results in...
Base level	Parent level	An error since the base level has a higher number of rows or columns than the destination rows or columns.
Base level	Base level in the destination	A correct paste result only occurs when the intersection of measure is same for both source and destination.

Planner Example to Copy and Paste Columns and Rows

The following steps detail how a Planner would copy LY sales data to WP sales at the child level while viewing the data aggregated at all product levels, all locations, and all calendars.

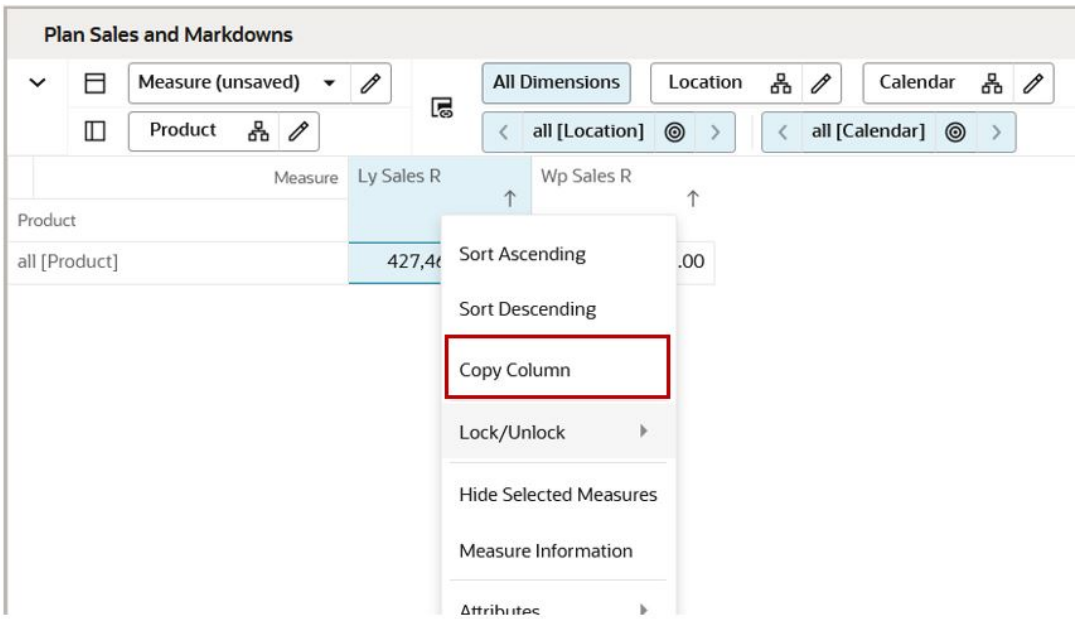
1. Click the header to select the entire column for *LY Sales U*.

Figure 5-82 Select the Column Header



2. Right-click to open the context menu and select **Copy Column**.

Figure 5-83 Context Menu Copy Column



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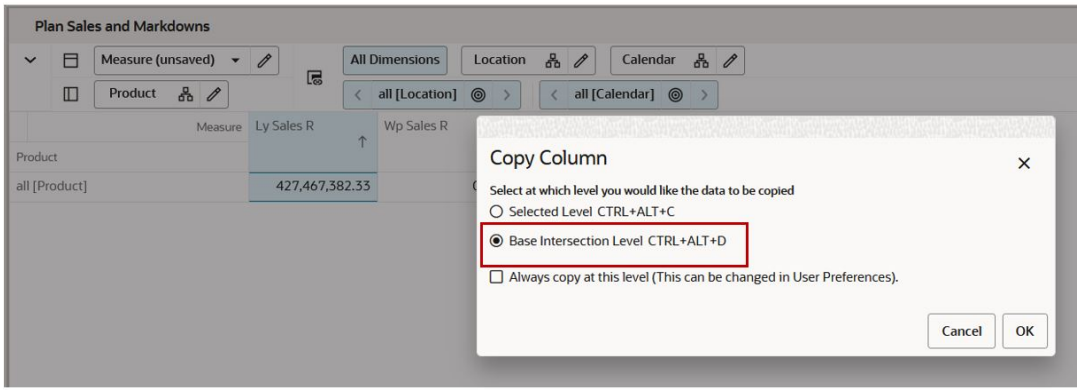
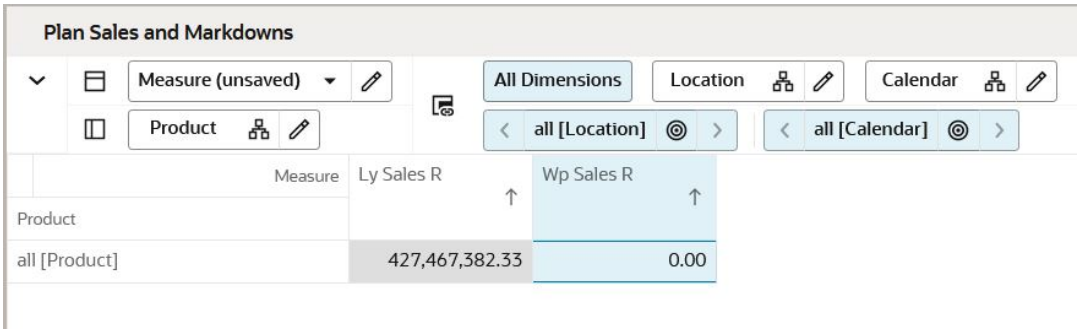
3. Select the copy option, **Base Intersection Level**.

Figure 5-84 Copy at the Base Intersection Level



4. Select the destination column, *WP Sales U*, to paste the data

Figure 5-85 Select the Column Header to Paste



5. Right-click to open the context menu and select **Paste Column**.

Figure 5-86 Context Menu Paste Column

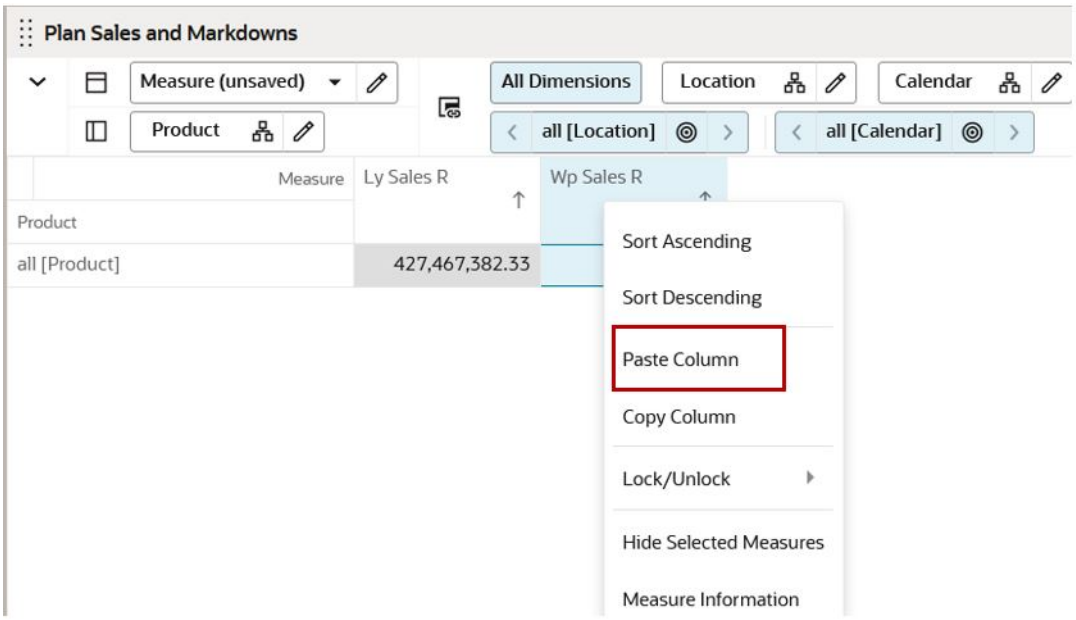


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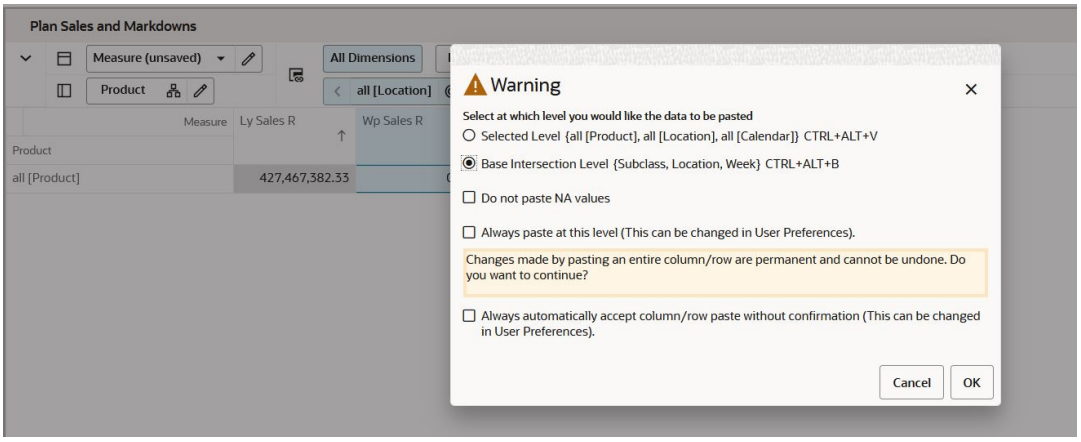
Figure 5-87 Paste at the Base Intersection Level



6. Select the paste option, **Base Intersection Level**.

7. The result is that the base intersection values of *LY Sales U* is copied to the base intersection level of *WP Sales U*.

Figure 5-88 Paste Result at the Aggregated Level

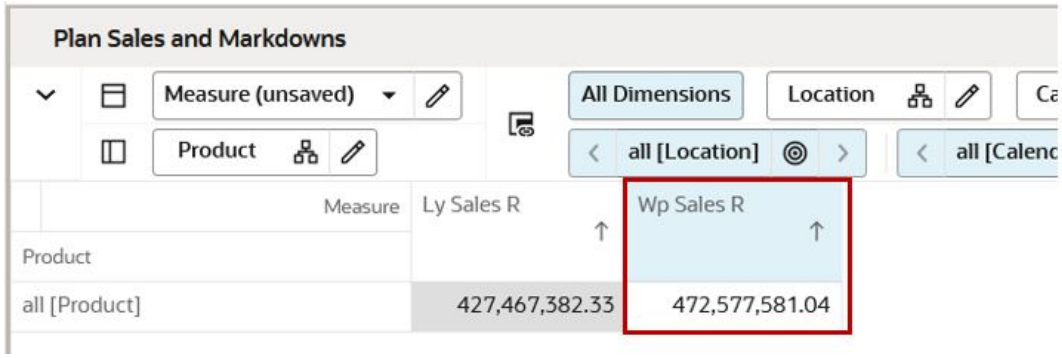
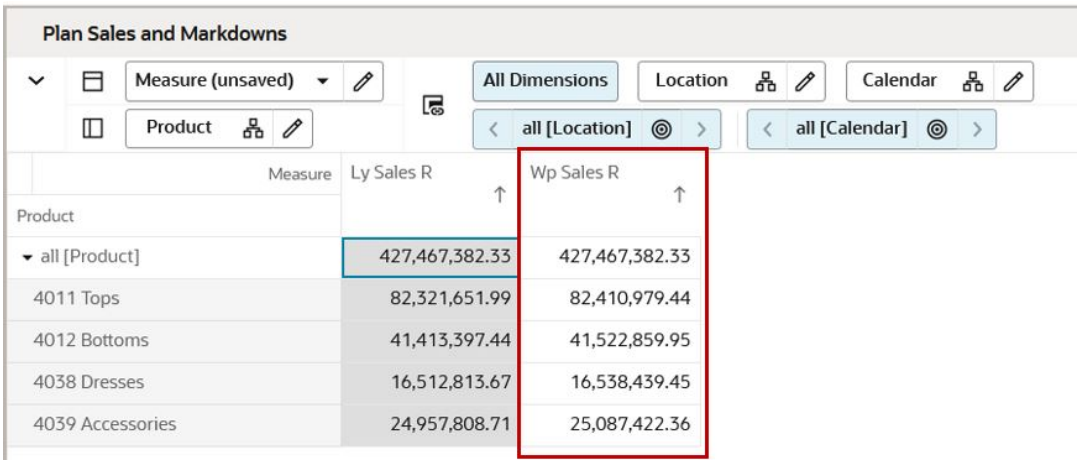


Figure 5-89 Result at the Base Intersection Level



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The following result shows the base level of product at all Calendar and all Location.

Using Copy and Paste between RPASCE and an External System

Follow these points when using copy and paste between RPASCE and an external system:

- Use keyboard shortcuts to copy (**Ctrl+C**) and paste (**Ctrl+V**) column or row data between RPASCE and an external application.
- When you copy an entire row or column from RPASCE to an external application, only the grid data is copied. The row or column header text is skipped. To copy column or row headers from RPASCE to an external application, you can use the context menu option **Copy Label** and then use **Ctrl+V** to paste. You can also use keyboard shortcut **Ctrl+Q** to copy the column or row header.

  To copy and paste the entire row and/or column into RPASCE from external application, make sure to remove the header of the row and/or column, the header cell (text) is copied in RPASCE grid when pasting the data.
- Multiple rows or columns can be copied and pasted between RPASCE and an external application.
- Restricted cell data is skipped for column and row copy and paste while copying data from external application to RPASCE.

  Restricted cell data includes data for read only cells, locked cells, protected cells, and format mismatch
- You can copy and paste the z-axis label from RPASCE to an external application by using the context menu option **Copy Label**. Select the label which you need to copy, then use the right-click context menu option **Copy Label** and use **Ctrl+V** to paste the label in an external application. You can also use keyboard shortcut **Ctrl+Q** to copy the z-axis label.
- You can copy and paste multiple non-contiguous columns or rows from RPASCE to an external device. When you copy paste two or more non-contiguous columns or rows to external device, the paste result will appear in contiguous columns or rows For more details about non- contiguous rows or columns, refer to Selecting a Group of Non-Contiguous Cells.
- Copy and paste for a non–contiguous selection of multiple rows and/or columns from and external device to RPASCE is not recommended. The paste result may differ from your expected result.

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Figure 5-90 Copy Label for Column or Row Header

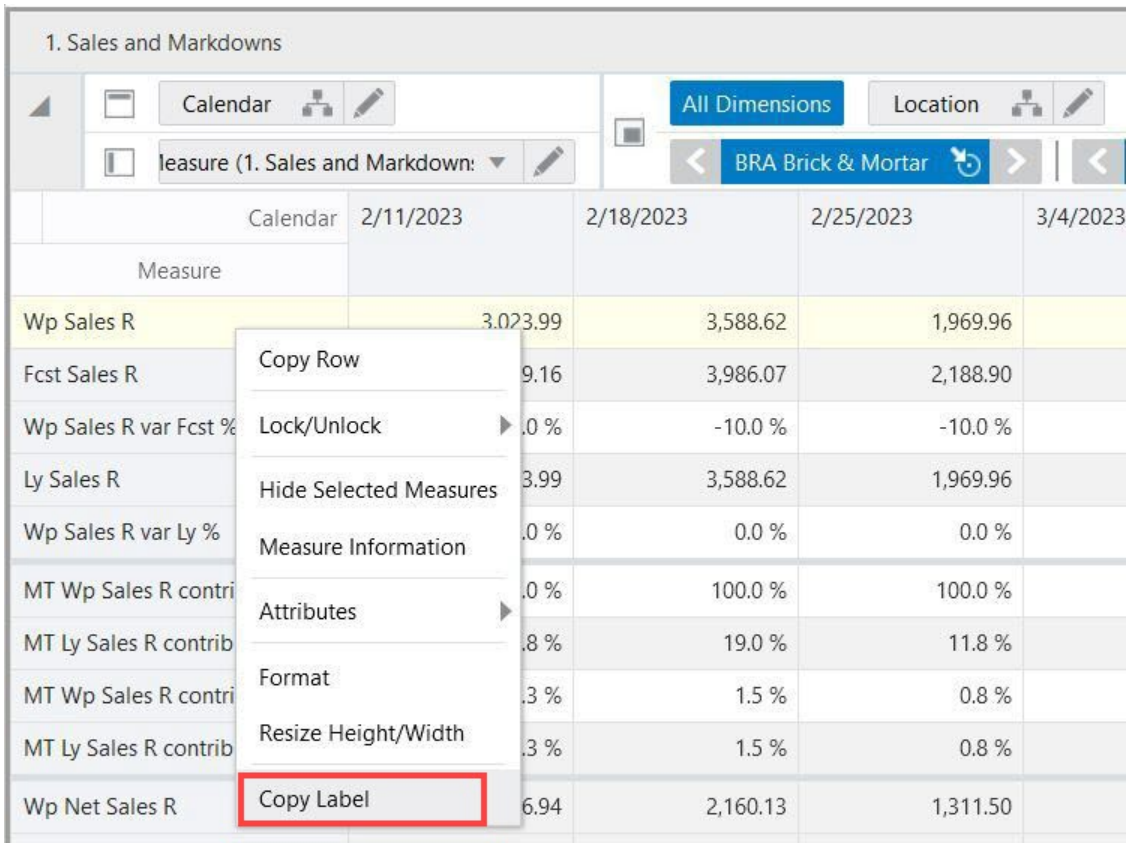

Figure 5-91 Copy Z-axis Label

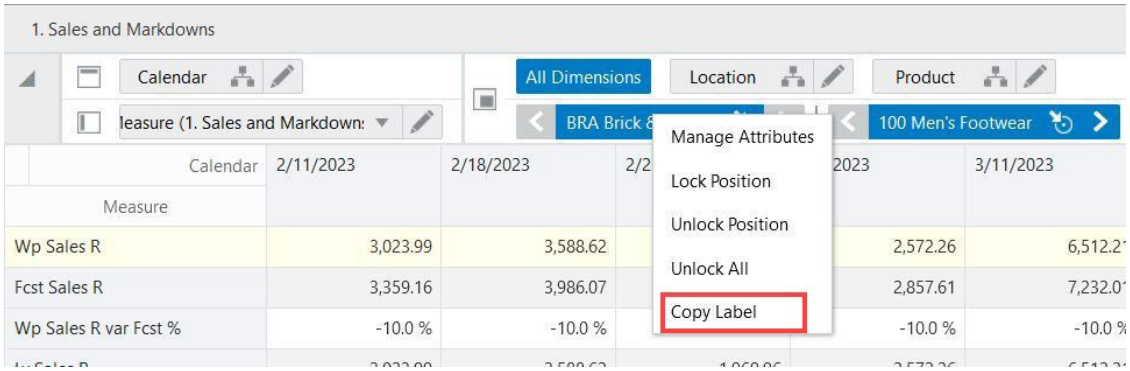

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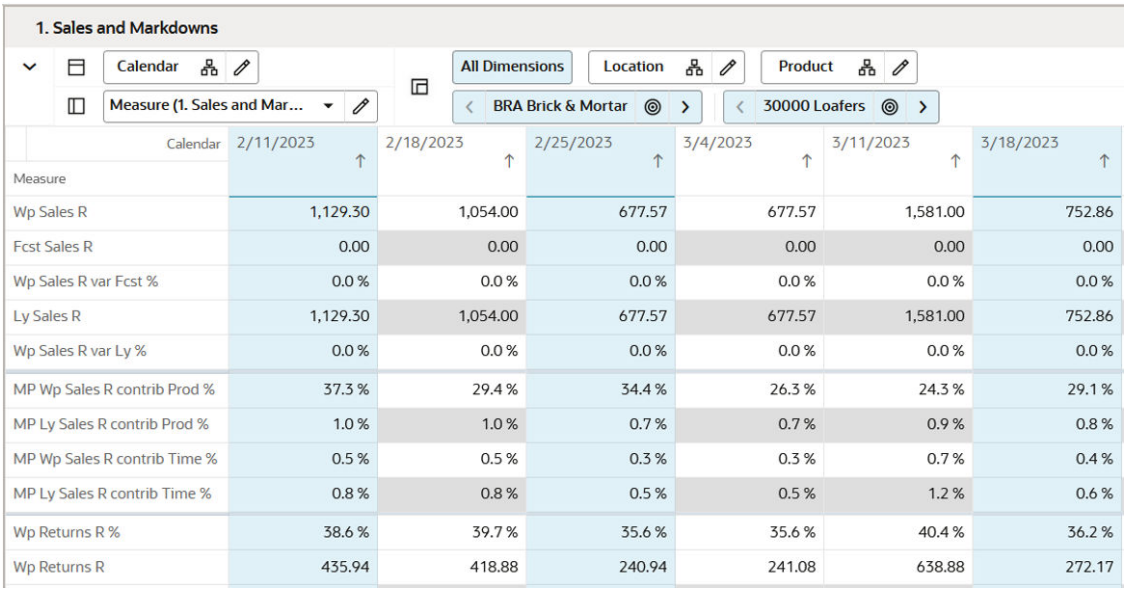
Figure 5-92 Copy Non-contiguous Columns from RPASCE



Calendar / Measure	2/11/2023	2/18/2023	2/25/2023	3/4/2023	3/11/2023	3/18/2023
Wp Sales R	1,129.30	1,054.00	677.57	677.57	1,581.00	752.86
Fcst Sales R	0.00	0.00	0.00	0.00	0.00	0.00
Wp Sales R var Fcst %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Ly Sales R	1,129.30	1,054.00	677.57	677.57	1,581.00	752.86
Wp Sales R var Ly %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
MP Wp Sales R contrib Prod %	37.3 %	29.4 %	34.4 %	26.3 %	24.3 %	29.1 %
MP Ly Sales R contrib Prod %	1.0 %	1.0 %	0.7 %	0.7 %	0.9 %	0.8 %
MP Wp Sales R contrib Time %	0.5 %	0.5 %	0.3 %	0.3 %	0.7 %	0.4 %
MP Ly Sales R contrib Time %	0.8 %	0.8 %	0.5 %	0.5 %	1.2 %	0.6 %
Wp Returns R %	38.6 %	39.7 %	35.6 %	35.6 %	40.4 %	36.2 %
Wp Returns R	435.94	418.88	240.94	241.08	638.88	272.17

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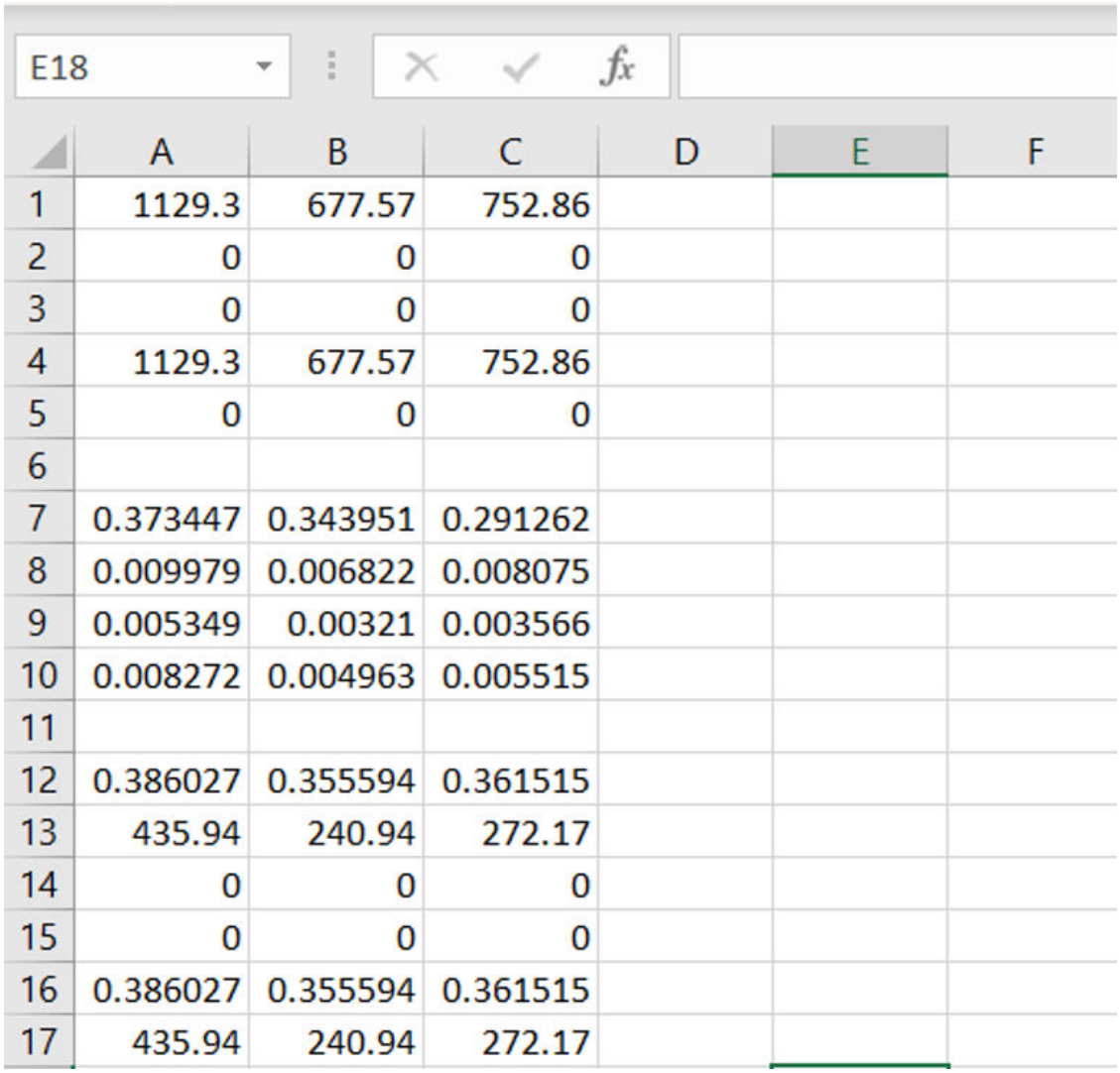
Figure 5-93 Paste Result on External Application



Data Type Results between RPASCE and External Applications

When copying and pasting between RPASCE and external applications, the results differ based on the type of data that is copied and pasted. It also differs depending on if the copy or paste function is performed *from* or *to* the RPASCE and the external application as shown in Table 5-5.

Table 5-5 Data Type Results for Copy and Paste Functionality

Data Type	From RPASCE to External Application	From External Application to RPASCE
Boolean	Results are ***True*** and ***False***.	To receive the desired result of ***True***, copy the value ***1*** to RPASCE. To receive the desired result of ***False***, copy the value ***0*** to RPASCE.

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Table 5-5 (Cont.) Data Type Results for Copy and Paste Functionality

Data Type	From RPASCE to External Application	From External Application to RPASCE
SHS (Single Hierarchy Select Text Measure)	Only values are pasted to external applications. For example, the copied cell value of ***Fall, FY2005*** is pasted as ***s2_2005***.	Ensure that the data is copied and pasted as a value, if a label is pasted instead of the value, it will cause an error in the result.
Date	Copied dates lose their format and paste as a YYYY-MM-DD format. For example, the copied date ***11/18/2020*** pastes as ***2020-11-18***.	Copied dates lose their format and paste as a ***MM/DD/YYYY*** format. For example, the copied date ***18-11-2020*** pastes as ***11/18/2020***.
Real Number	Unformatted values are pasted. Verify that the results are as expected.	Formatting is applied to the pasted value.
Picklist	Labels are pasted to external application, not the value. For example, the copied cell has a label of ***one*** and a value of ***a***, the paste result is ***one***.	Labels gets copied from external application and gets pasted to RPASCE.
Integer	Only integer values are pasted to external applications.	Formatting is applied to the pasted integer value.

Benefits of copy and paste functionality between RPASCE and external applications:

- Copy and paste of a column or row header is designed to enable the functionality within RPASCE.
- Allows copy and paste functionality of a column or row header on mobile devices like tablets where keyboard shortcuts are unavailable.

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.

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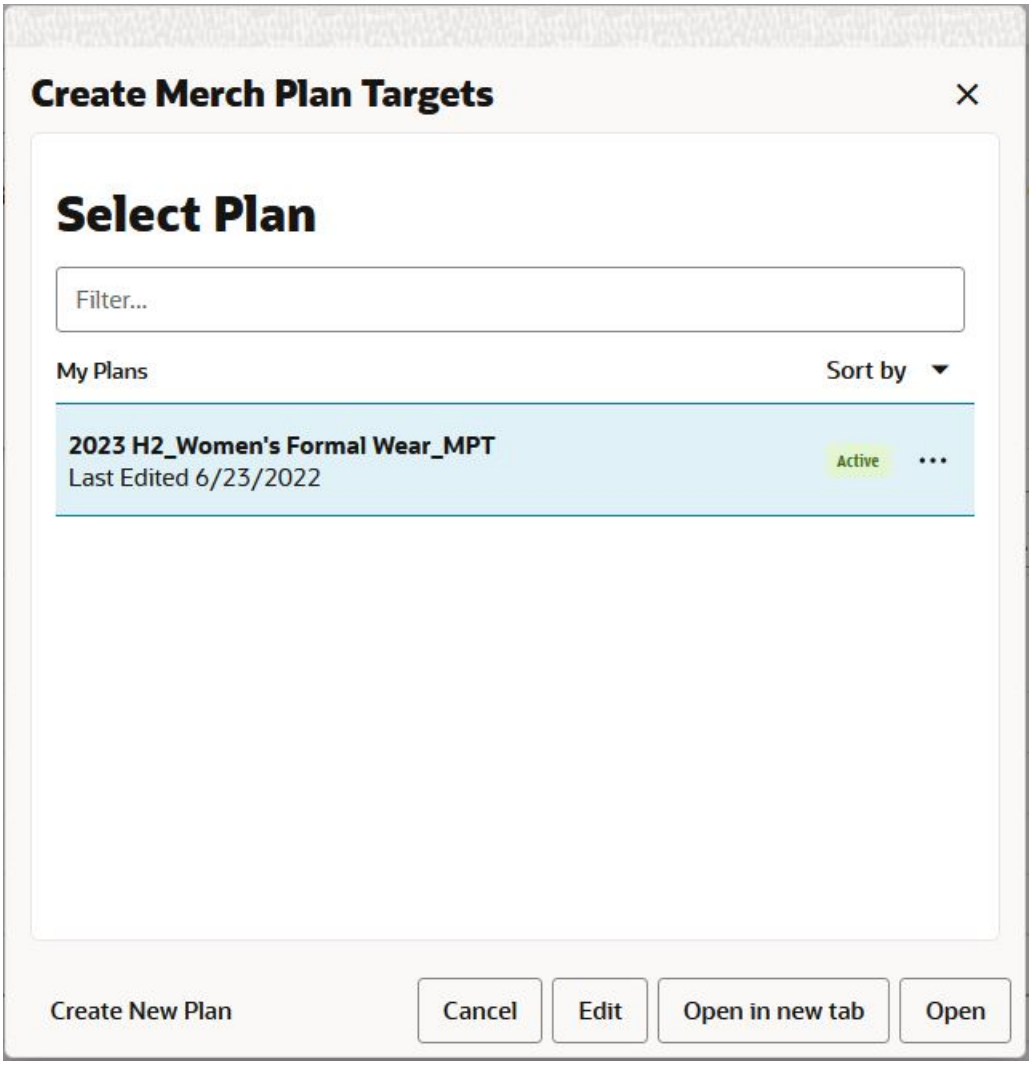
Figure 5-94 Opening a Workspace



In Figure 5-94, one segment has been defined for the Create Merch Plan task. The segment **2023 H2_Women's Formal Wear_MPT** is selected within the dialog with an option to open it in current application browser tab or a separate browser tab.

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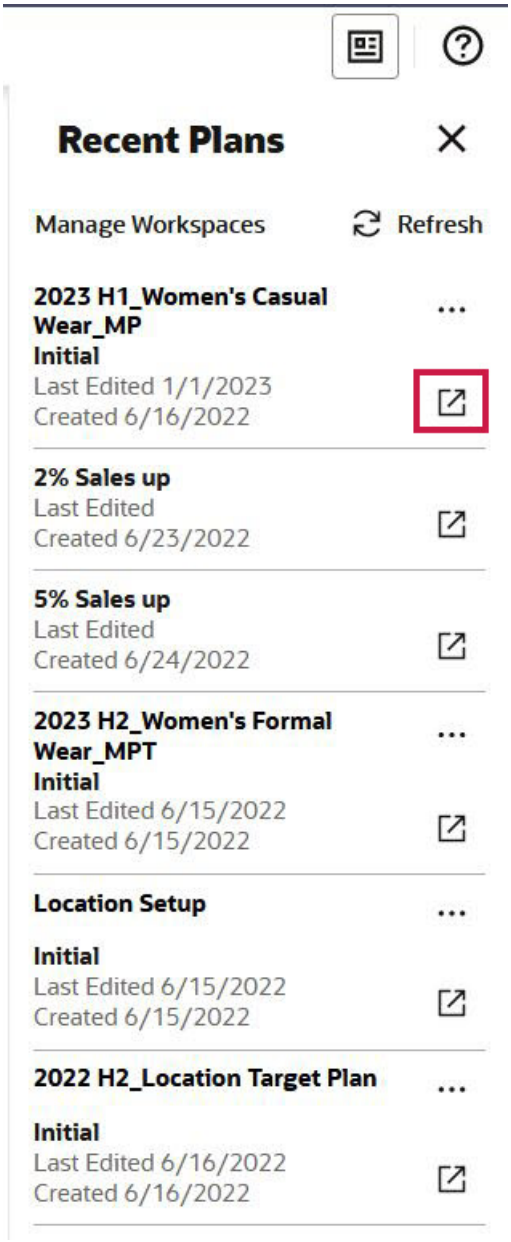
Figure 5-95 Recent Plans



Because the 2023 Merch Plan workspace has been recently used, it is also present within the Recent Plans section of the dashboard. Click the segment name to open the segment workspace in the current browser tab. Click Open Tab (highlighted in red) to open the segment workspace 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 regular schedule that the system uses to automatically rebuild

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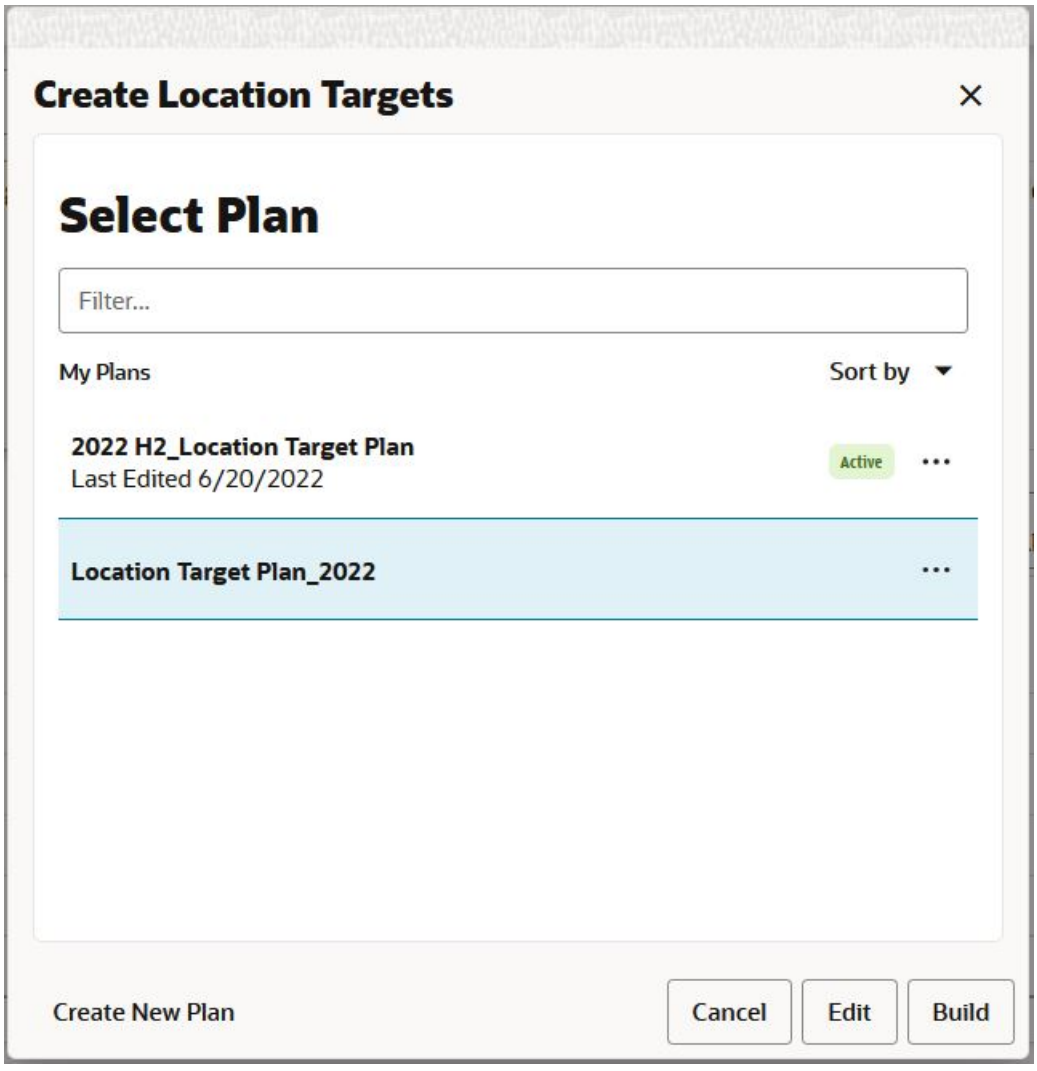
workspaces (usually in response to the loading of new data to the application). However, under certain circumstances, such as duplicating a segment, it may be possible that a segment you have defined will not have a workspace built and available when you wish to work in it.

> **Note**
>
> To view the updates or changes in the wizardless workbooks, you should remove the existing segment and re-build the workbook again.

Figure 5-96 Building Workspaces



In Figure 5-96, the segment **2022 H2_Location Target Plan** has a workspace ready for use and can be opened. The segment **Location Target Plan_2022** 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

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workspace is ready to be opened. To build the **Location Target Plan_2022** 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.

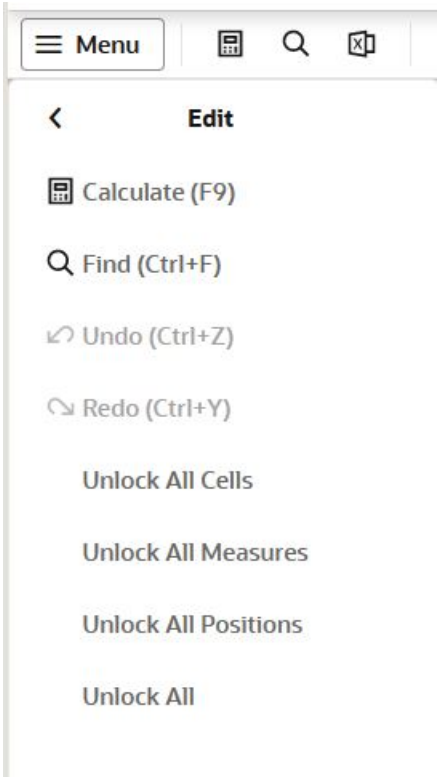
Second, the business logic defining how values in the workspace will update based upon an edit is sophisticated enough to be able to choose between multiple ways of updating the workspace data for a set of edits or combination of edits and cell locking, depending on which measures have been edited or 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 5-97 Calculate Workspace



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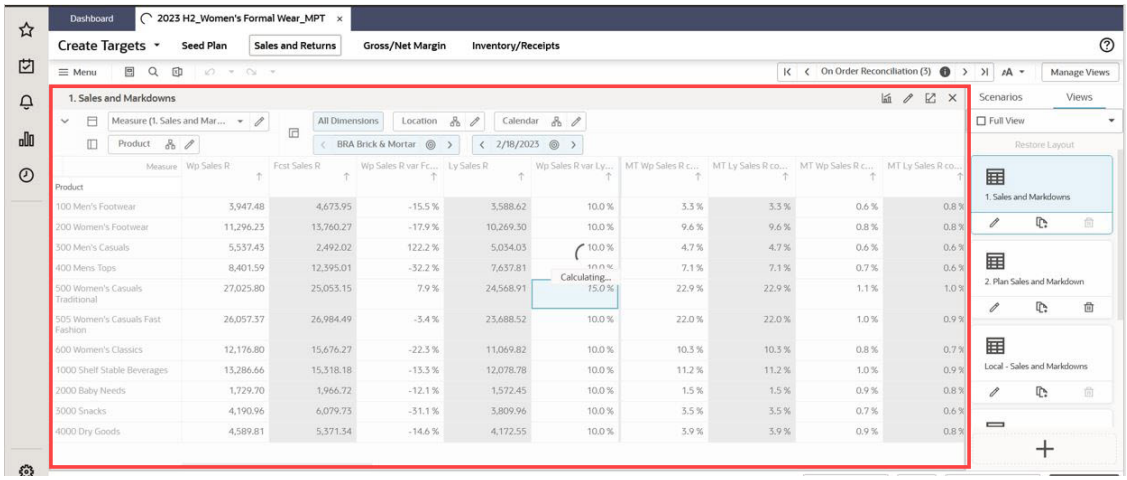
Click **Calculate** from either the menu bar above the open views or the action tray below it or use the Calculate accelerator hotkey (F9).

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 5-98, you cannot interact with the area indicated by the red box. Outside of it, you can continue with your work.

Figure 5-98 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.

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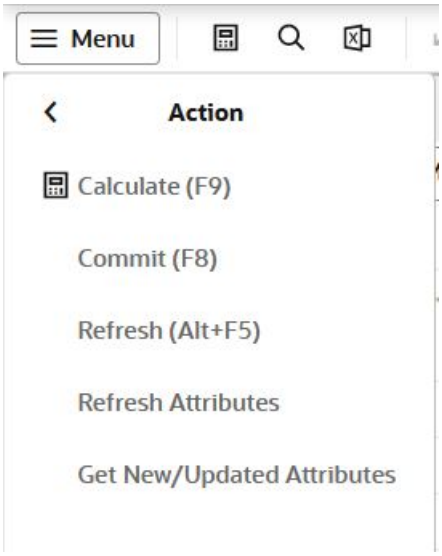
Figure 5-99 Refresh Workspaces



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.

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.

In order to commit a workspace once you are finished with your work, you can close the workspace. A message prompt displays, *Do you want to commit your workspace?*. Click **Yes** to commit and close your workspace or click **No** to close your workspace.

> **Note**
>
> All operations performed in the workspace (refreshes, calculations, commits, and so on) cause the workspace to be automatically saved.

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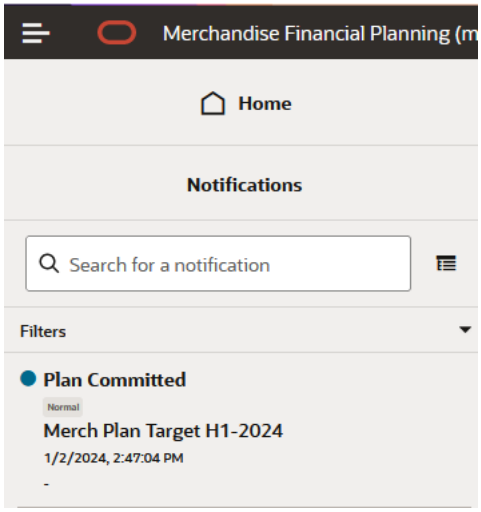
Once the workspace commit is complete, the system creates a notification to inform you that the data has been processed by the system. You can refer to the notification section bell icon to view the commit notifications. You can also track the status of the commit on the Admin Dashboard.

Figure 5-100 shows an example of the notification received at the conclusion of a segment workspace commit.

Figure 5-100 Commit Notifications



Once your commit is completed successfully, you can see the time of the Last Committed displayed at the bottom of workspace in the date and time format. This provides information when you have committed your data on the workbook.

> **Note**
>
> In case of shared workspaces, when a Commit action is performed by any user (receiver or creator) after sharing, then the commit notifications is displayed to all the users.
>
> When a commit action is progress for a workspace, you cannot re-build the workbook until commit is complete.

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6

Segments

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

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

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

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

Understanding the Segment Window

You can use the Segment window 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
- Share an existing segment with other users
- Rename an existing segment
- Duplicate an existing segment
- Delete an existing segment or workspace

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Figure 6-1 Segment Window

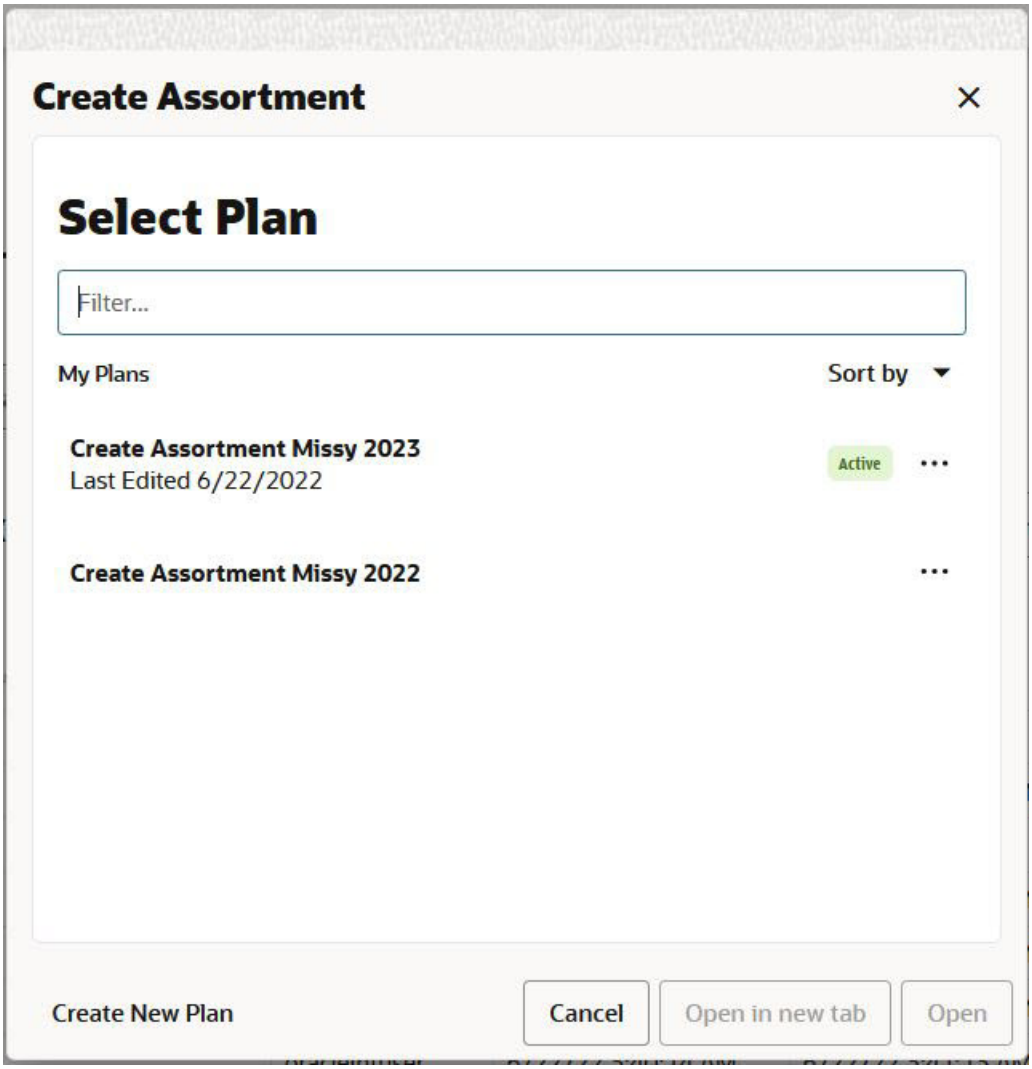

Figure 6-1 shows the segments that are already defined. You can create a new segment at any time by selecting the link in the lower left hand corner.

Active 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.

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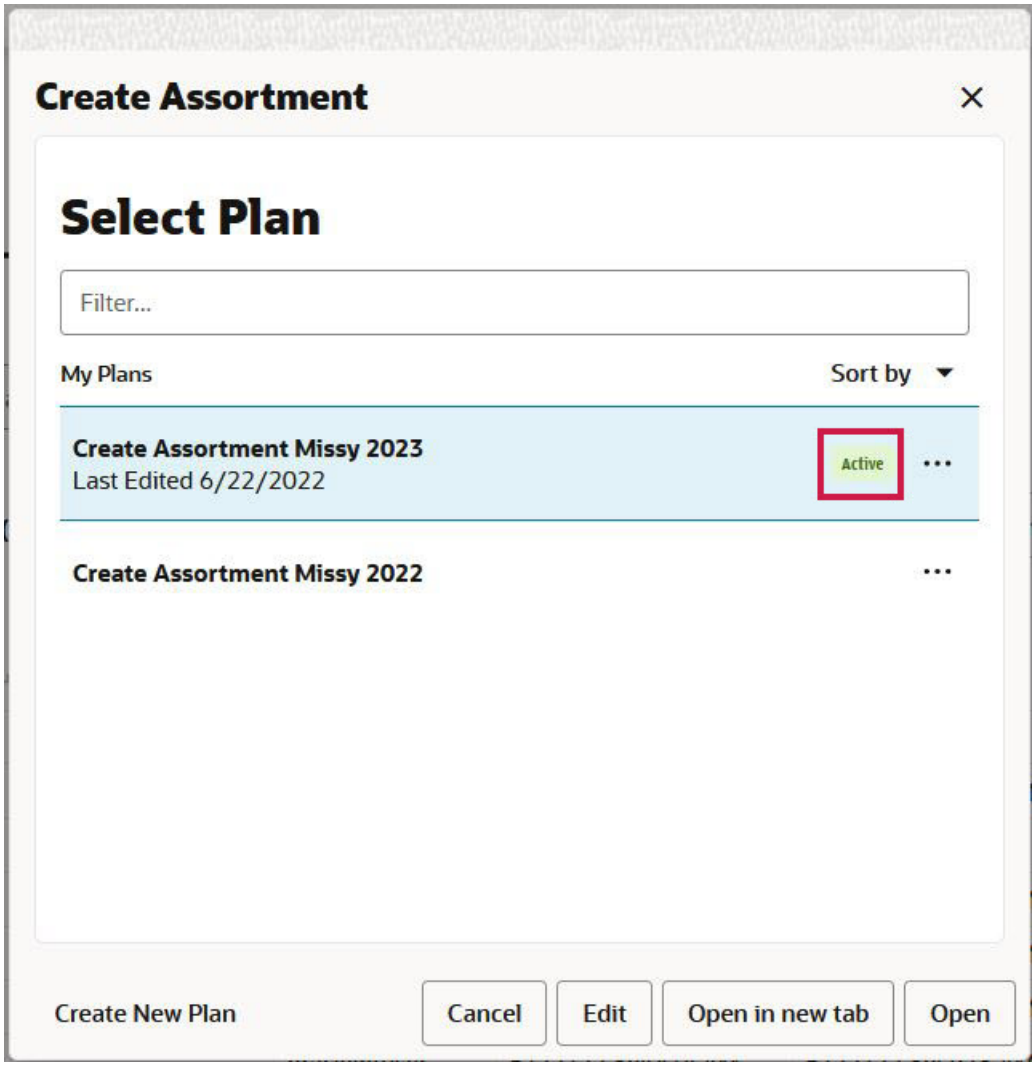
Figure 6-2 Create Assortment Active Segment



Conversely, a segment without **Active**, must have its associated workspace built before that workspace can be opened.

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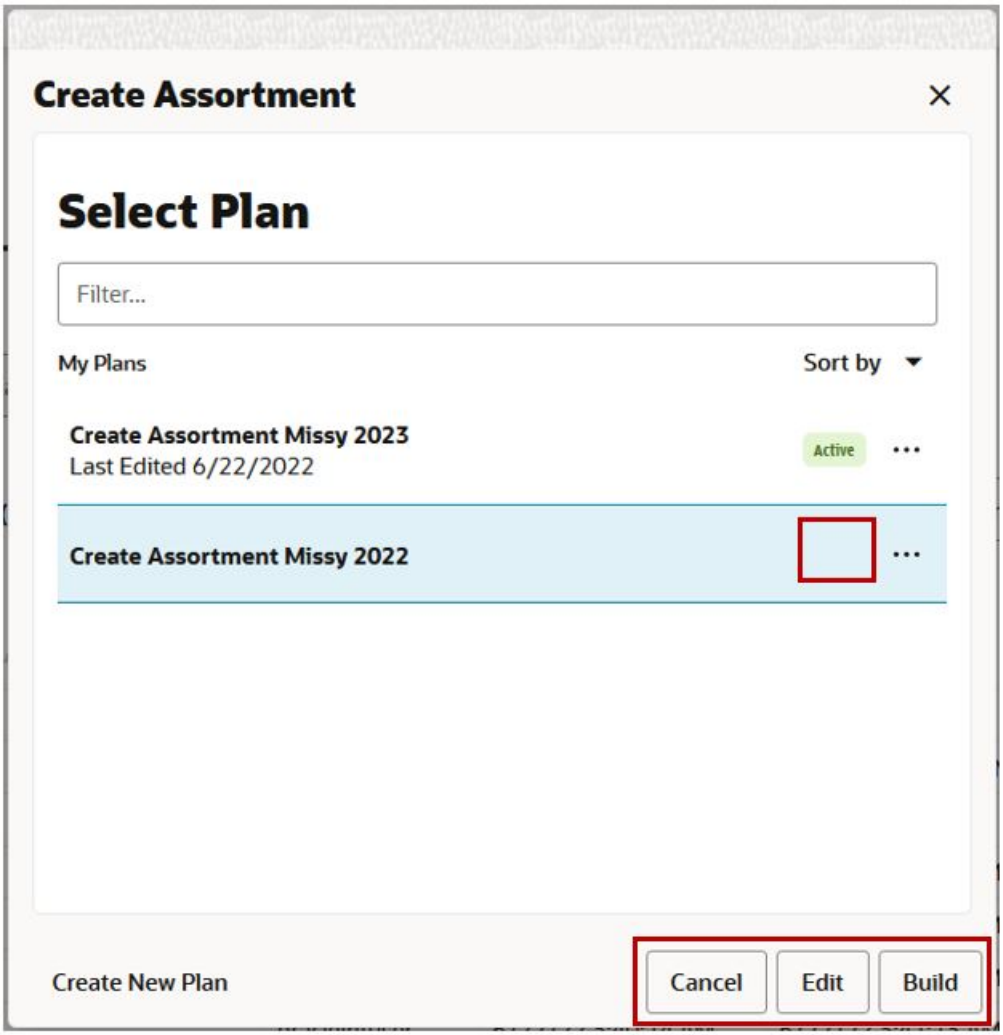
Figure 6-3 Create Assortment Inactive Segment



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.

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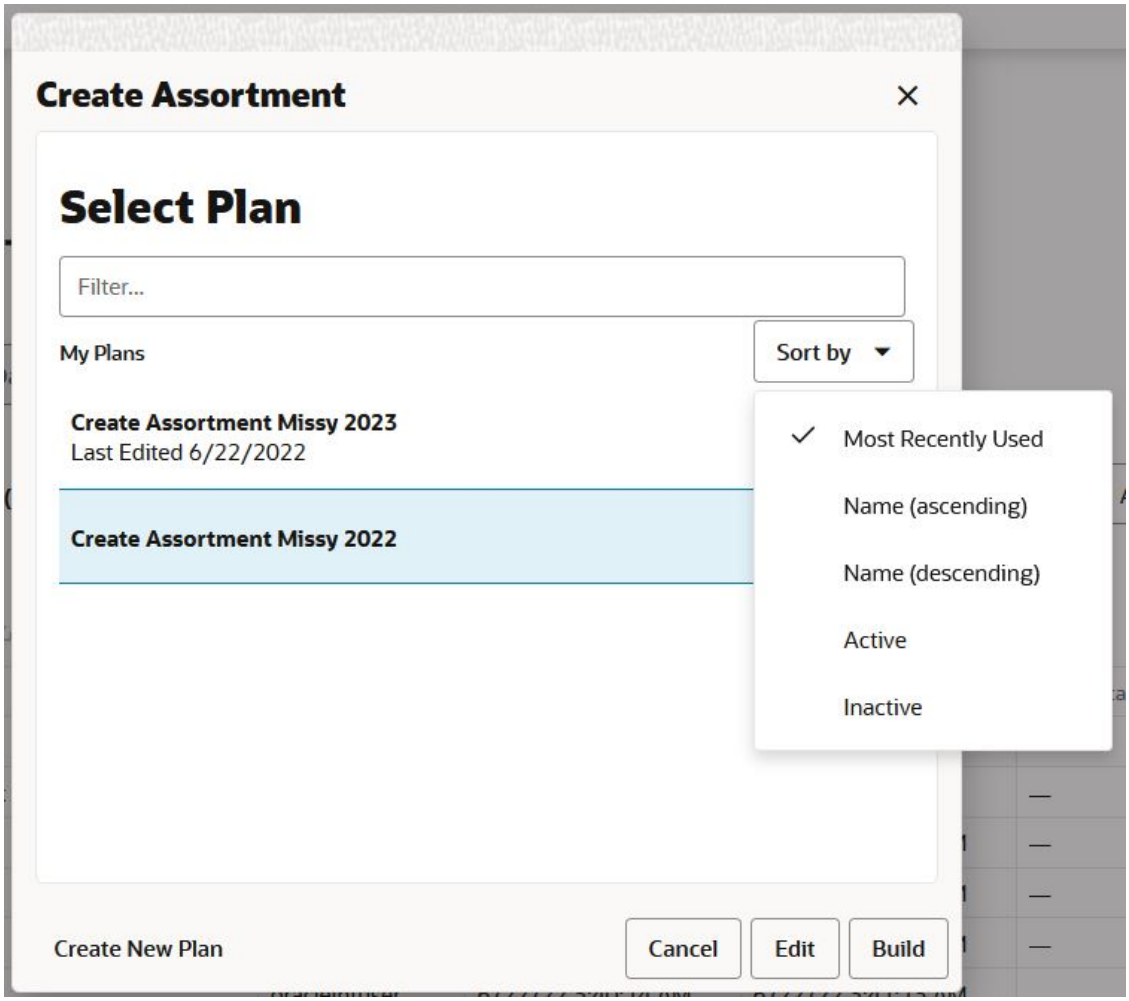
Figure 6-4 Segments Sort By List



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 6-5, the value 2023 has been entered into the Select Plan search box. The list of segments displayed include only those with the value 2023 in the label.

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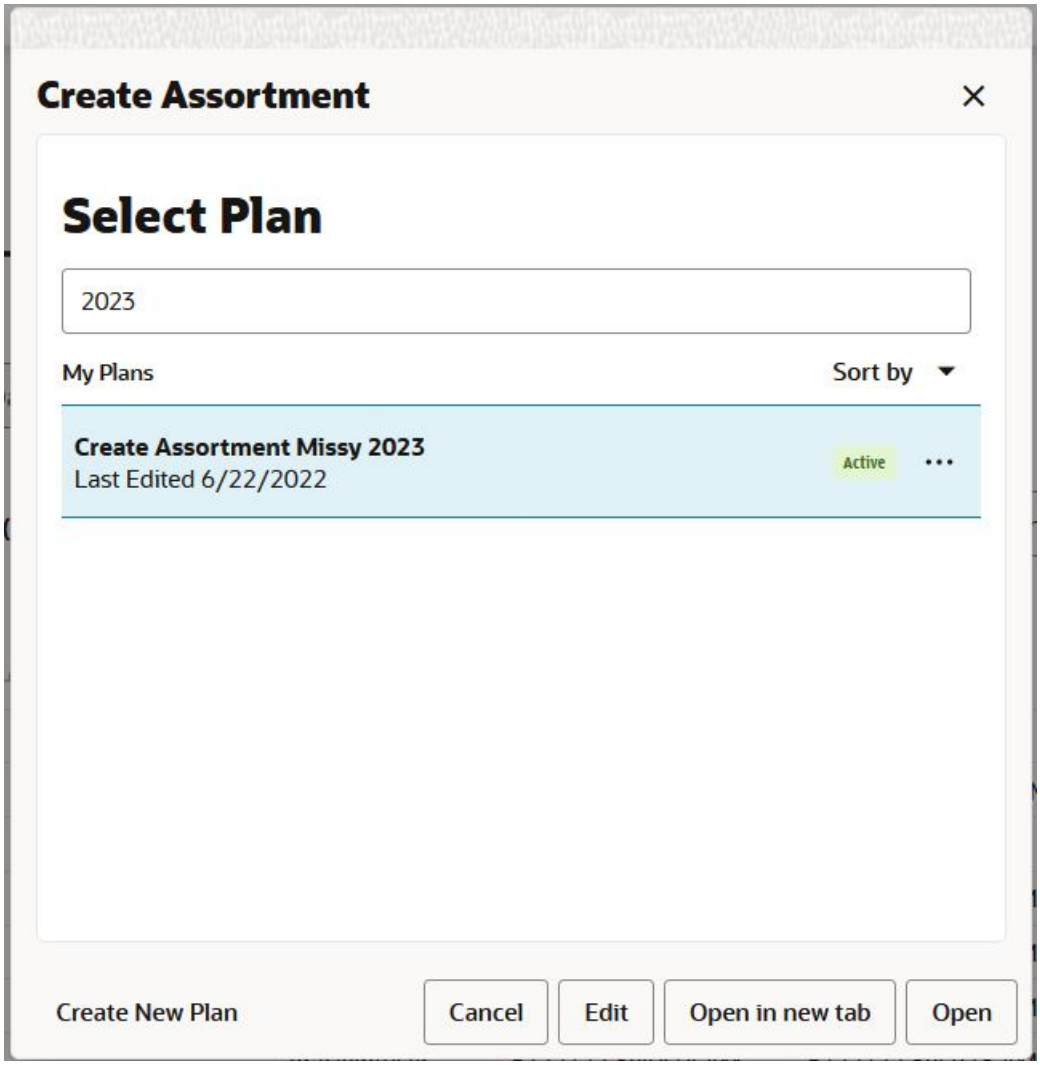
Figure 6-5 Segment Search



Creating a New Segment

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

A new segment can be created either with **Create New Plan** button 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 enabled.

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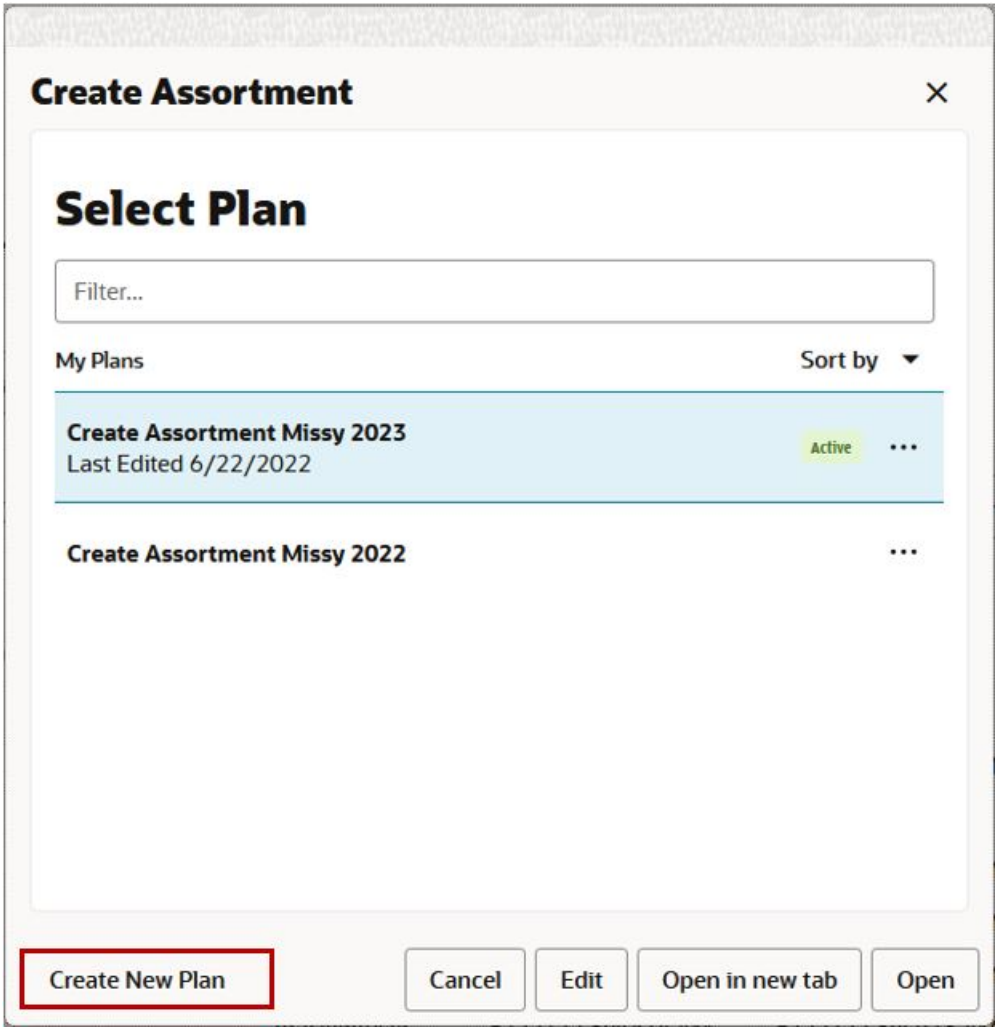
Figure 6-6 Create New Segment



Action Menu

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

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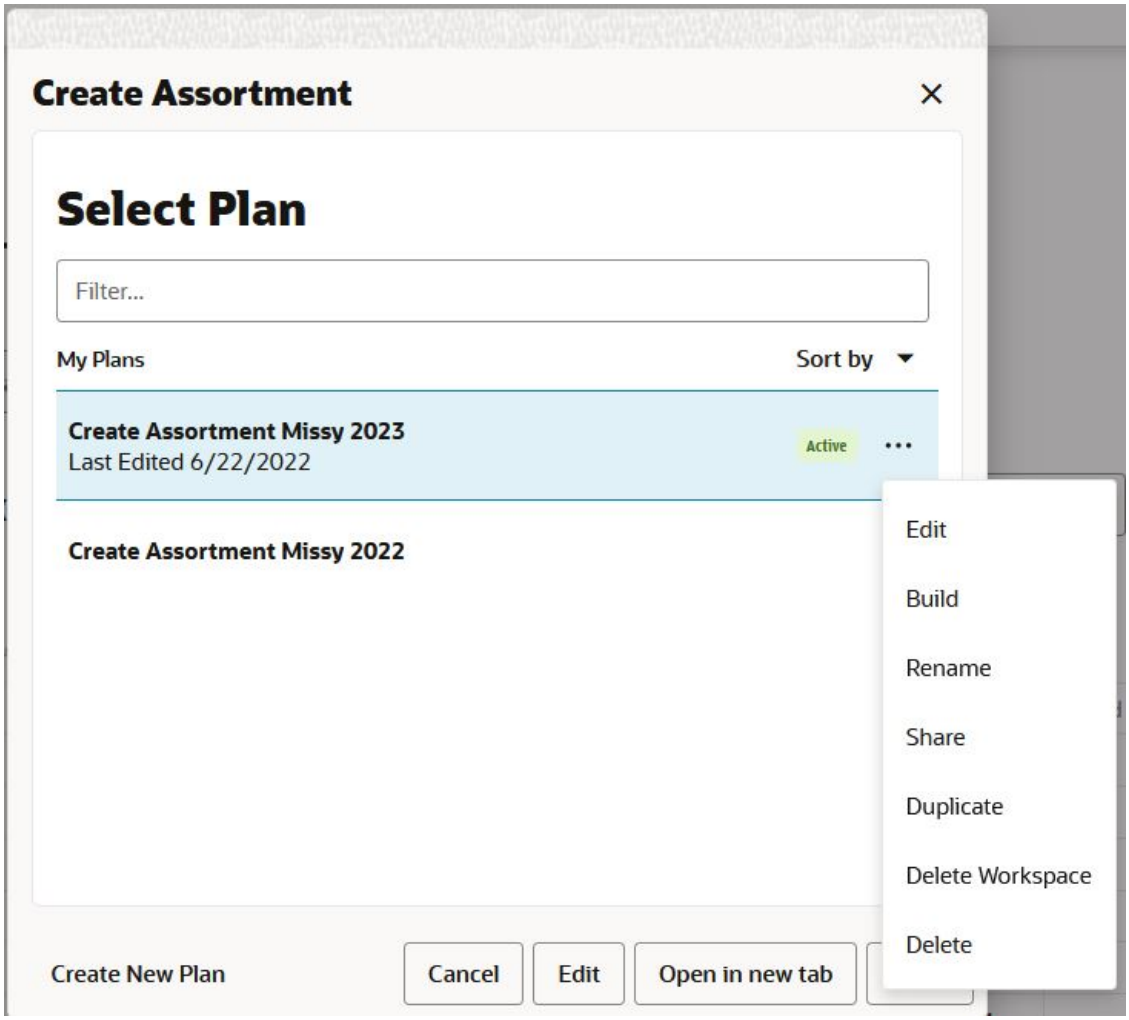
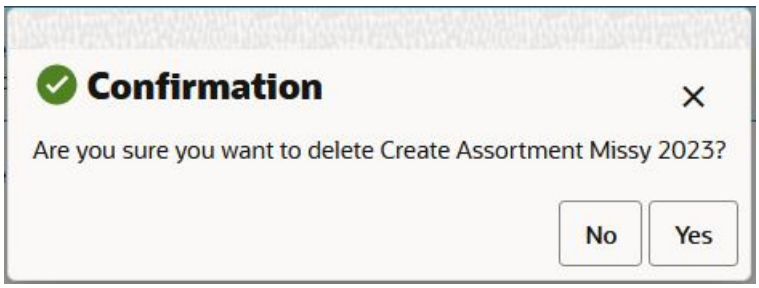
Figure 6-7 Segment Action Menu



Deleting a Segment

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

Figure 6-8 Deleting a Segment



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> **Note**
>
> Deleting a segment also deletes the workspace it is associated with. Ensure that you have finished working with the workspace and have committed the desired data before deleting the segment.

Building a Segment

In order to build a workspace for segment, select **Build** from the Action menu/segment window. 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 message appears, *'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.

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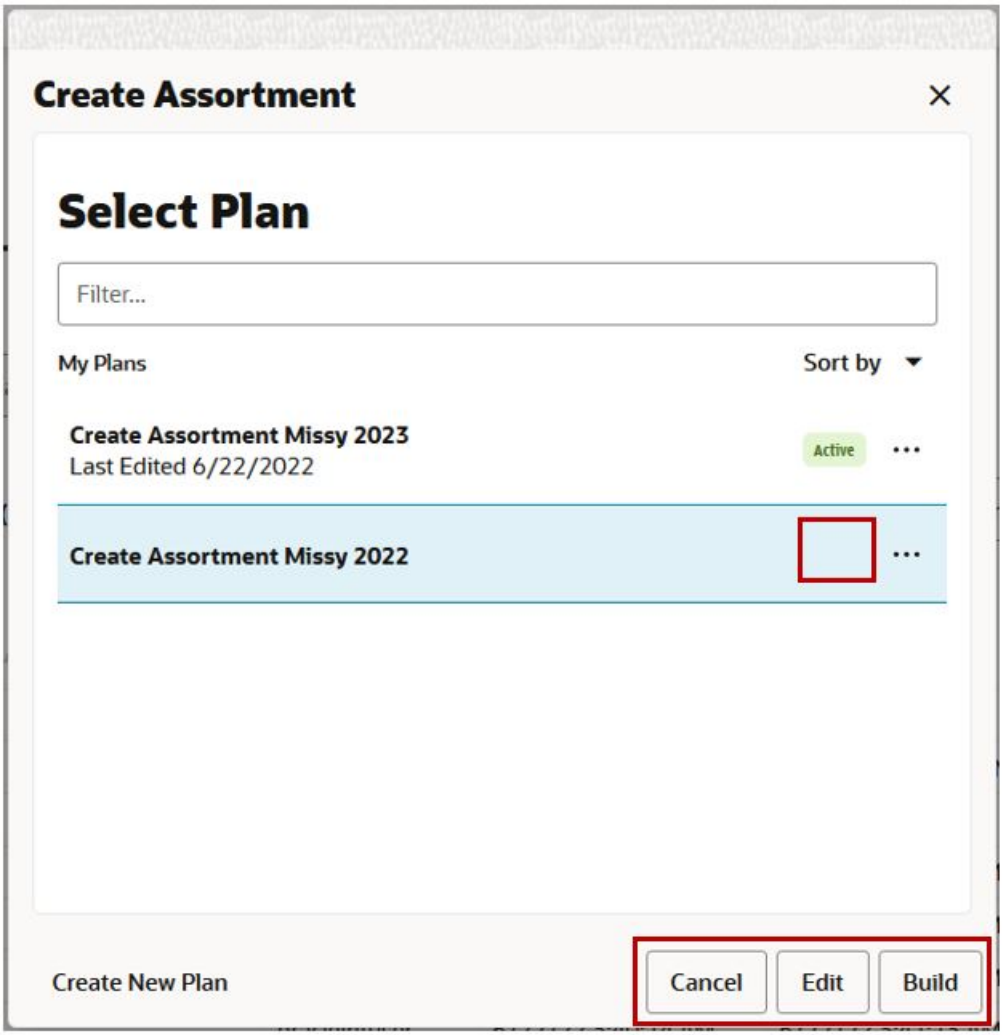
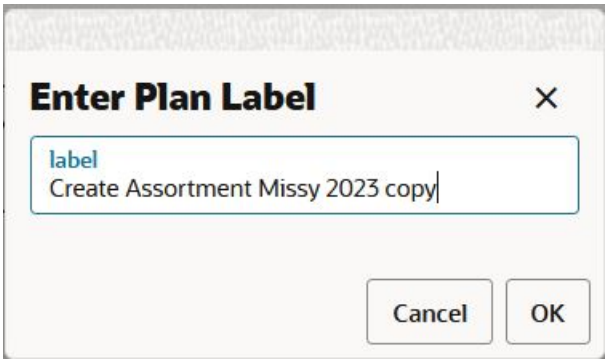
Figure 6-9 Building a Segment



Duplicating a Segment

In order to duplicate a segment, select **Duplicate** from the context menu. The window 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 6-10 Duplicating a Segment



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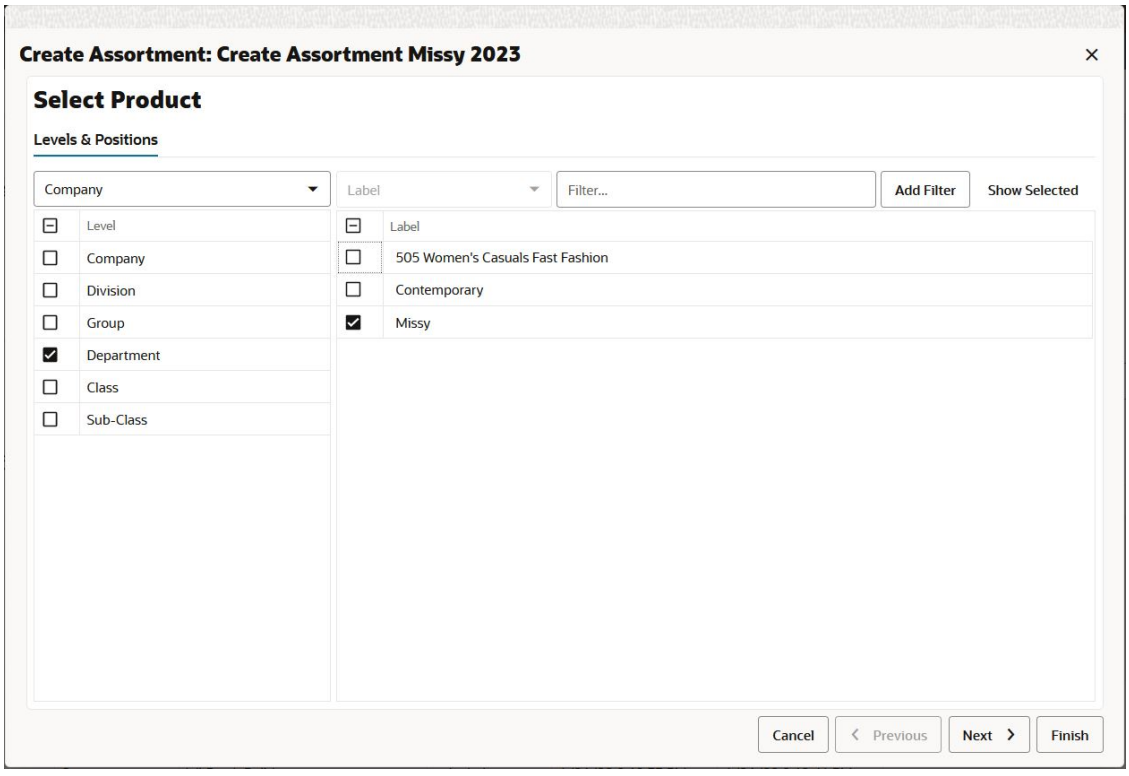
> **Note**
>
> Duplicating a segment copies the selections that define the workspace, but does not make a copy of the workspace. The associated workspace must be created (built) before it can be used.Editing a duplicated segment has no effect on the original segment or workspace.

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 6-11 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. Ensure that you have finished working with the workspace and have committed the desired data before deleting the segment.

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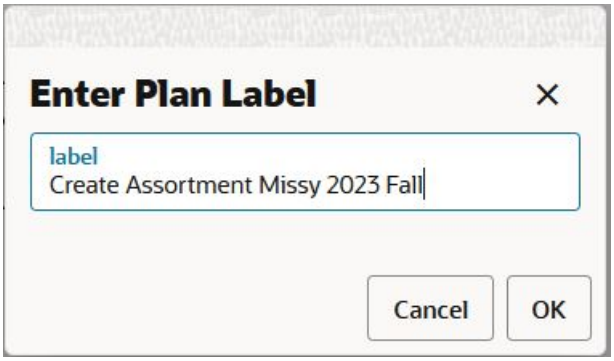
Renaming a Segment

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.

The segment can only be renamed if it is already open. This ensures that you do not break the segment or its workspace.

Figure 6-12 Renaming a Segment



Sharing a Segment

The Sharing feature allows you to share a existing segment with another user who has similar rights for the templates and positions. Sharing of Segments makes the team collaboration easier. These scenarios in the following list are examples that could enhance the team productivity when you use this feature.

- You are an assistant buyer who started a plan and you want to collaborate/finish with another Buyer.
- You are an assistant buyer who created versions of what-if scenarios and wants to share with the Buyer.
- You are a new associate that requires review or guidance from the manager in order to complete your plan.
- You are going on vacation and a colleague will be monitoring your plans.
- You are leaving the company and have work-in-progress that are not ready to commit (including what-if scenarios).

The following steps describe how you can share your existing segment with other users.

Next to the existing segment that you want to share, click the **Action Menu** and then click **Share**.

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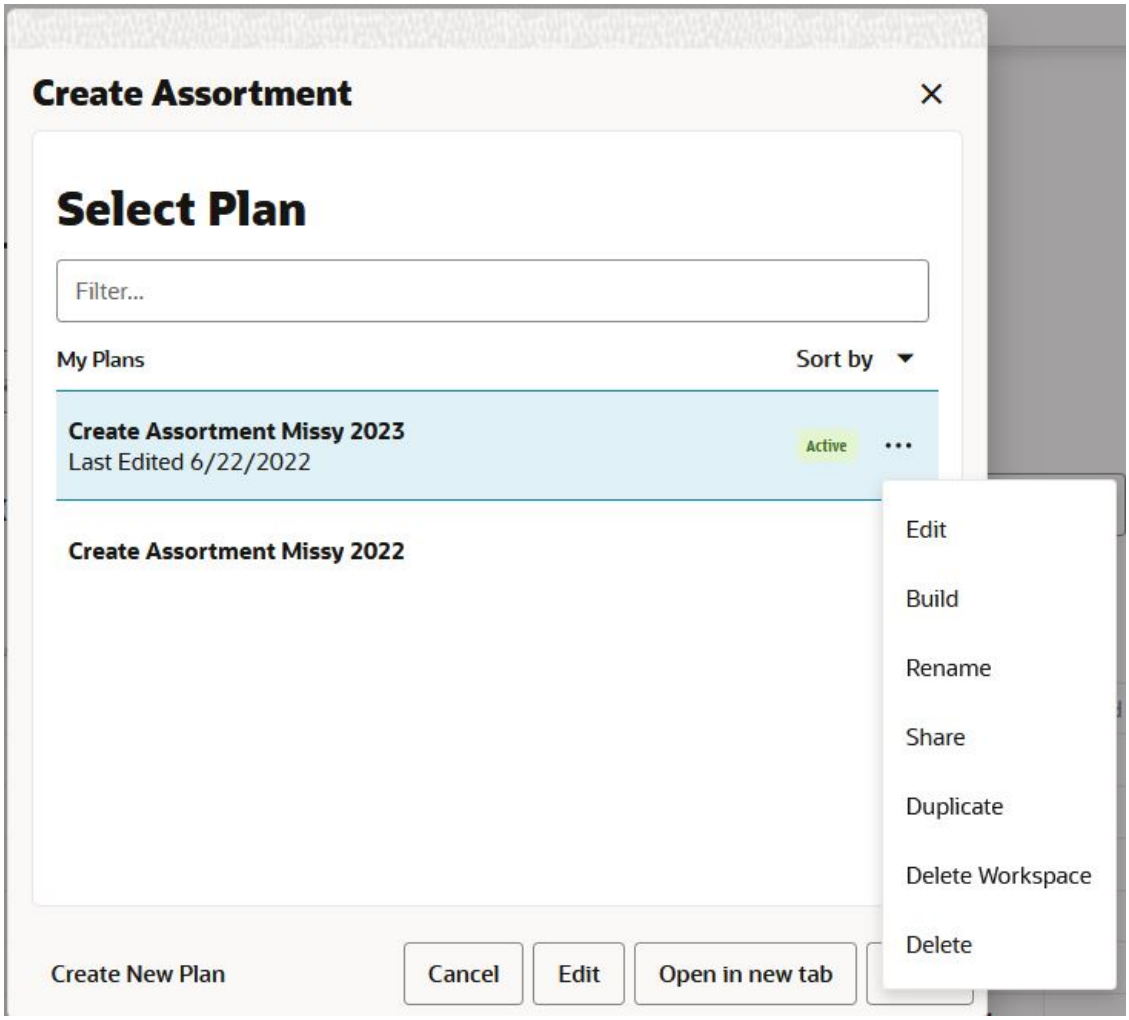
Figure 6-13 Share a Segment



RPASCE displays the Figure 6-14 where you can select the user to share the segment with.

You can select one or more users to share the segment with. Locate users by using the **Search for Users** box. Move available users by selecting the user and then using the > arrow to move them to the **Users with Access** pane.

Remove access for users by selecting them and then use the **<** arrow to move them to the **Available Users** pane. Use the double arrows (either **<<** or **>>**) to move all users between the panes.

> **Note**
>
> Ensure that desired data has been committed to be properly shared with the other user.
>
> In case of shared workspaces, when a Commit action is performed by any user (receiver or creator) after sharing, then the commit notifications is displayed to all the users.

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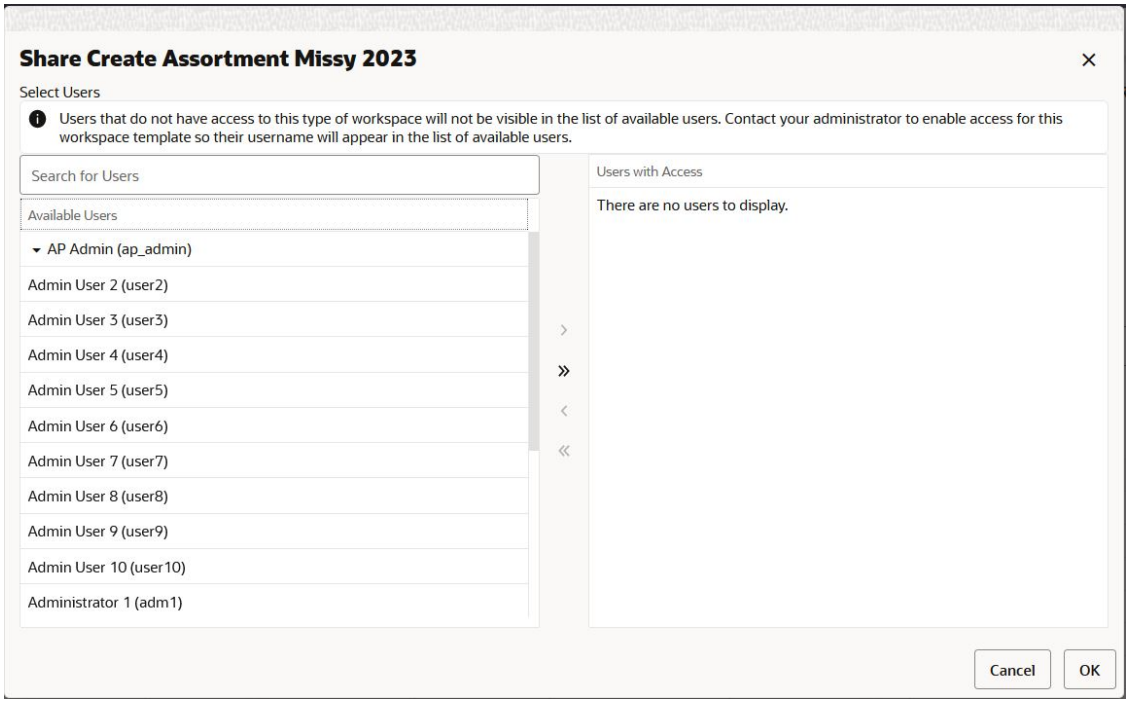
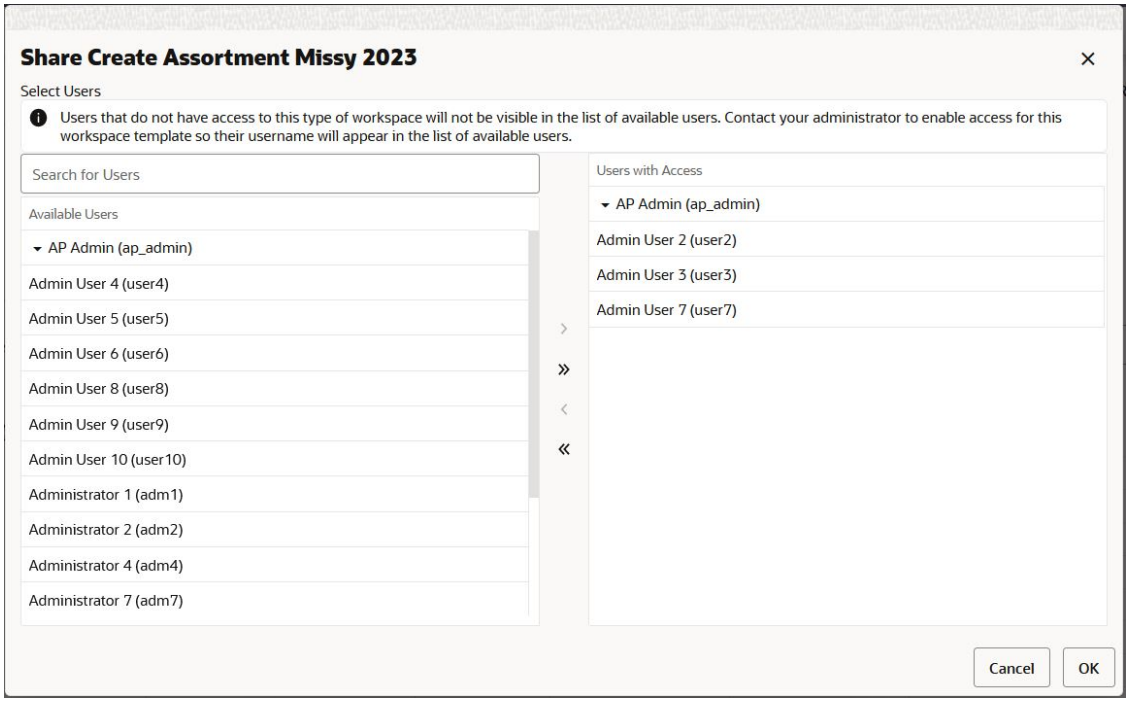
Figure 6-14 Select Users Window



The shared segment is available to the other users with access while creating the same segment under the same taskflow. Figure 6-15 shows the segment *Create Assortment Missy 2023* that is available for the *Admin User 2 (user2)* under the same taskflow.

Figure 6-15 Select User to Share a Segment



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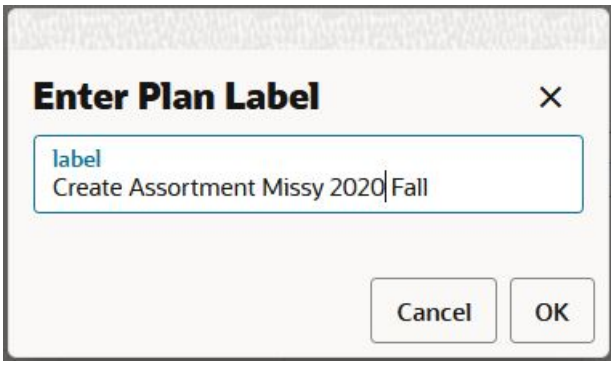
Wizards

When you select **Create New or Edit** in the Segments window, 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 6-16 Create New Plan Wizard



If any level has a higher number of positions than the position count threshold, 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.

> **Note**
>
> Unicode characters are accepted when creating the segment label.

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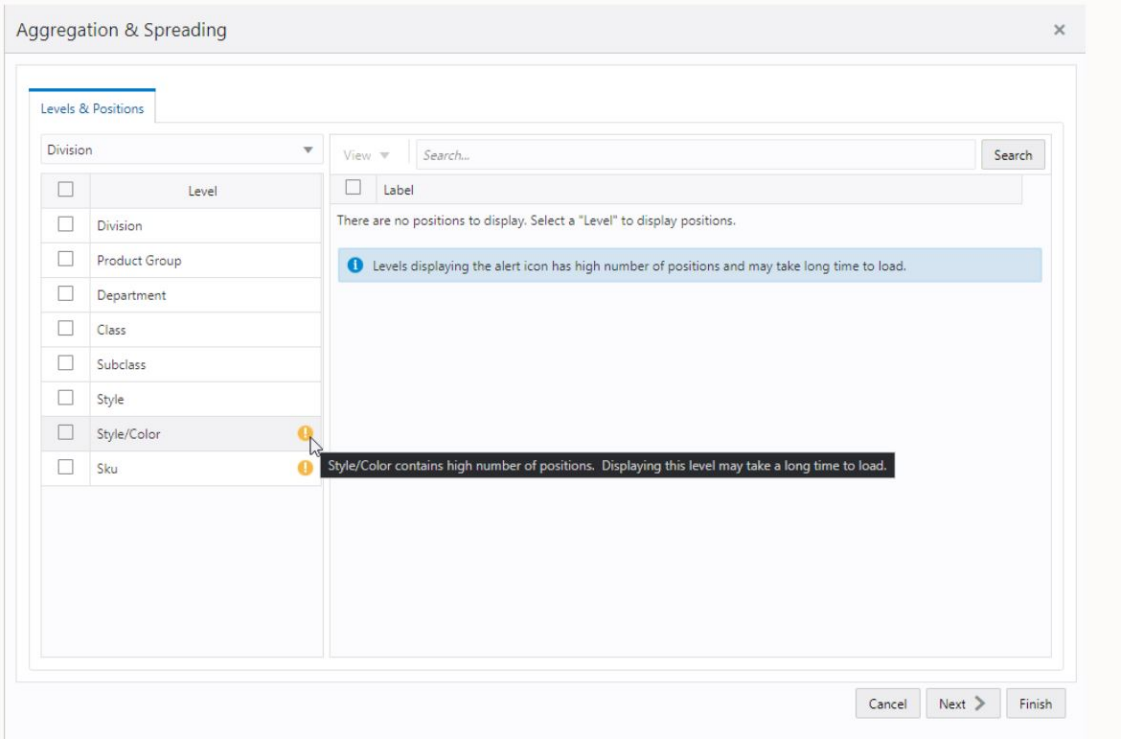
Figure 6-17 Wizard with a High Number of Positions



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 selecting the checkbox 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.

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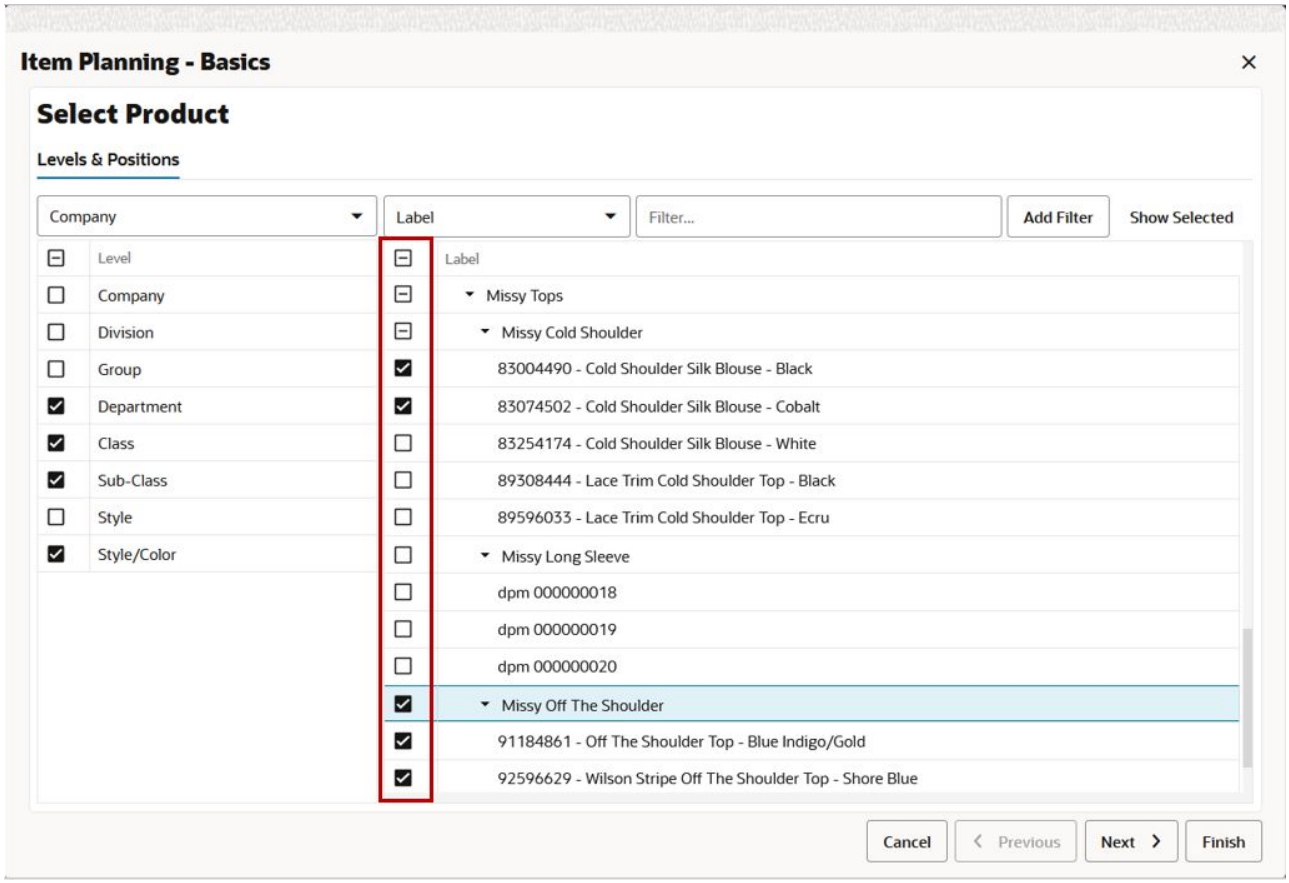
> **Note**
>
> If you select a large number of positions, it may impact the time required for the workspace to open. Select only the positions required for the current task.

Figure 6-18 Select Positions



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

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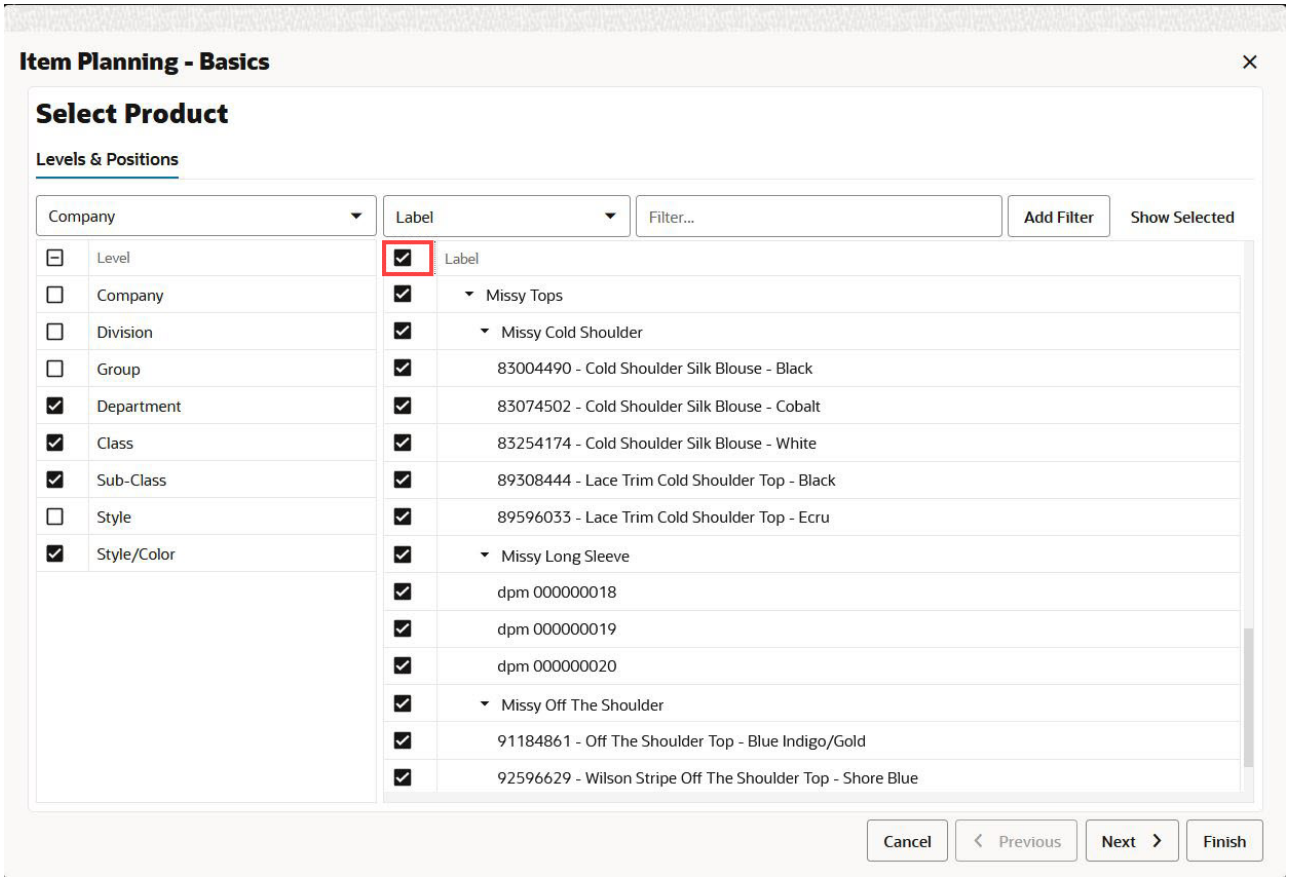
Figure 6-19 Select All Positions



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

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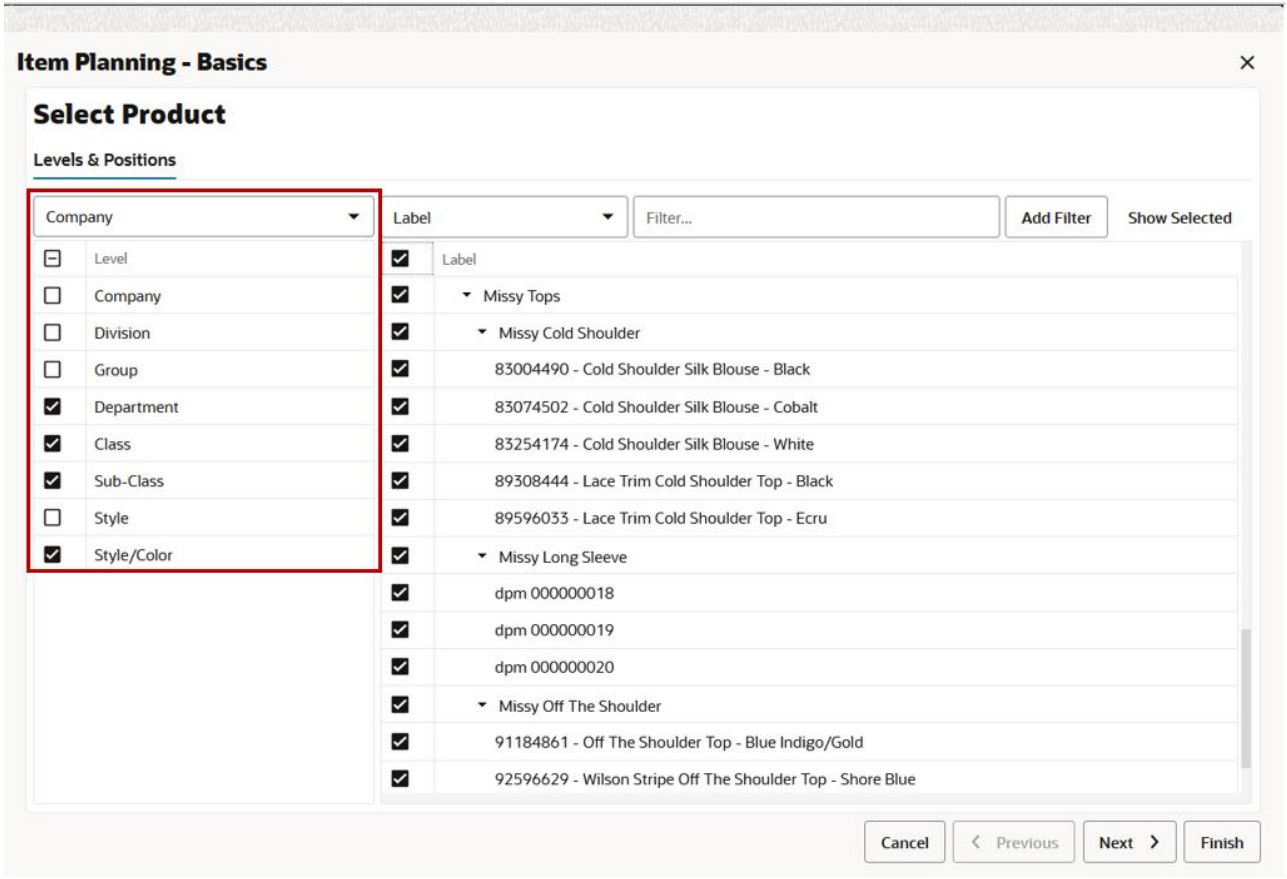
Figure 6-20 Change Position Levels



Display Attributes to Select Positions

You can display attributes on the wizard against the positions from Attribute tab located in the top right corner. By displaying the attributes, you can select the positions based on the attributes. For example, store location based on the attributes, like store, start date, climate, status, and so on. Or you can select the style color with the color attribute, black.

To display attributes for positions, follow these steps:

1. Select the Attributes tab that is located next to the Position tab in the top right corner.

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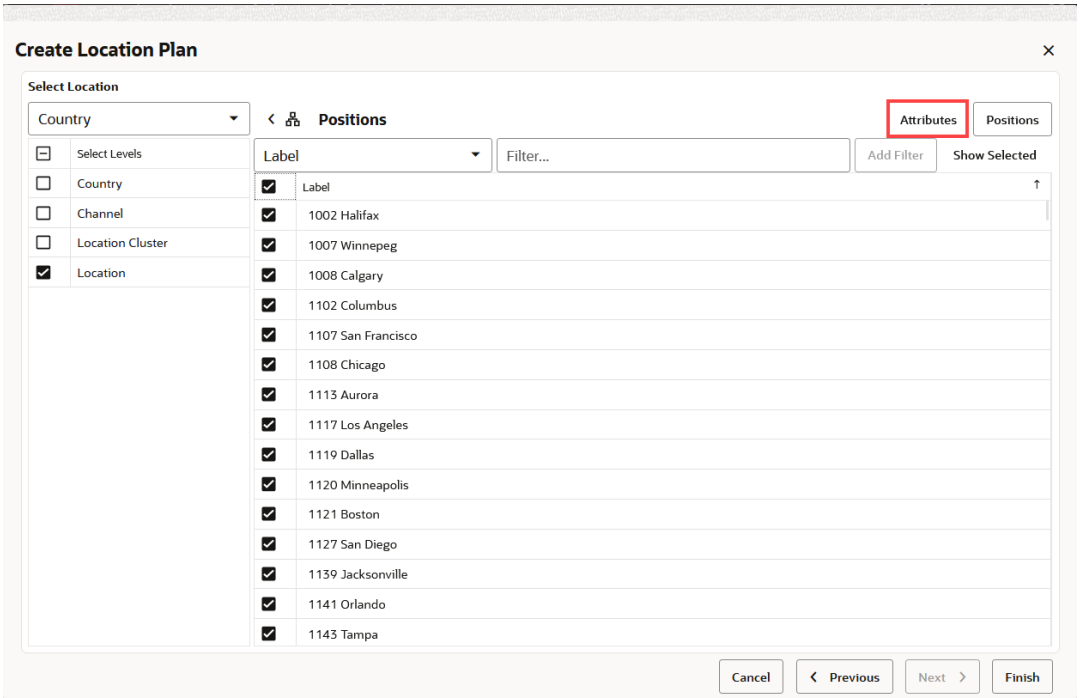
Figure 6-21 Attributes Tab on the Wizard



2. Using the Attributes tab, you can see the list of attributes listed for the selected position level. You can select attributed to display on the Position tab. The selected attributes display in the right-hand side section.

   You can re-order the attribute sequence by dragging and dropping the attribute tiles.

> **Note**
>
> The sort option is not available on the wizard's **Attributes** tab.

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Figure 6-22 Attributes List for the Selected Level

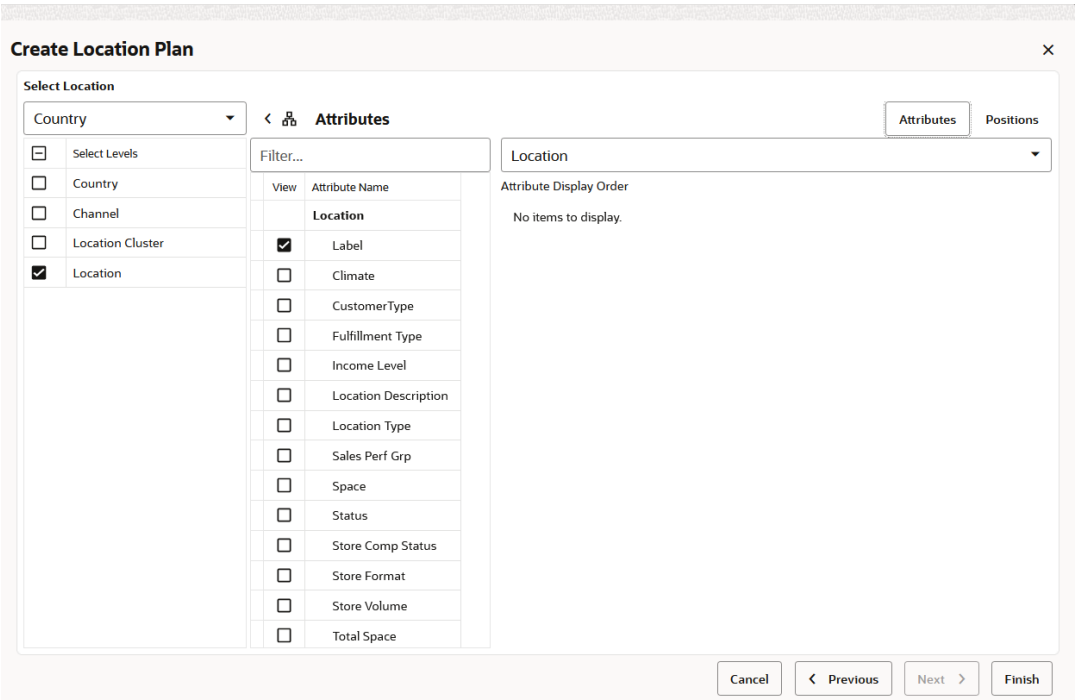
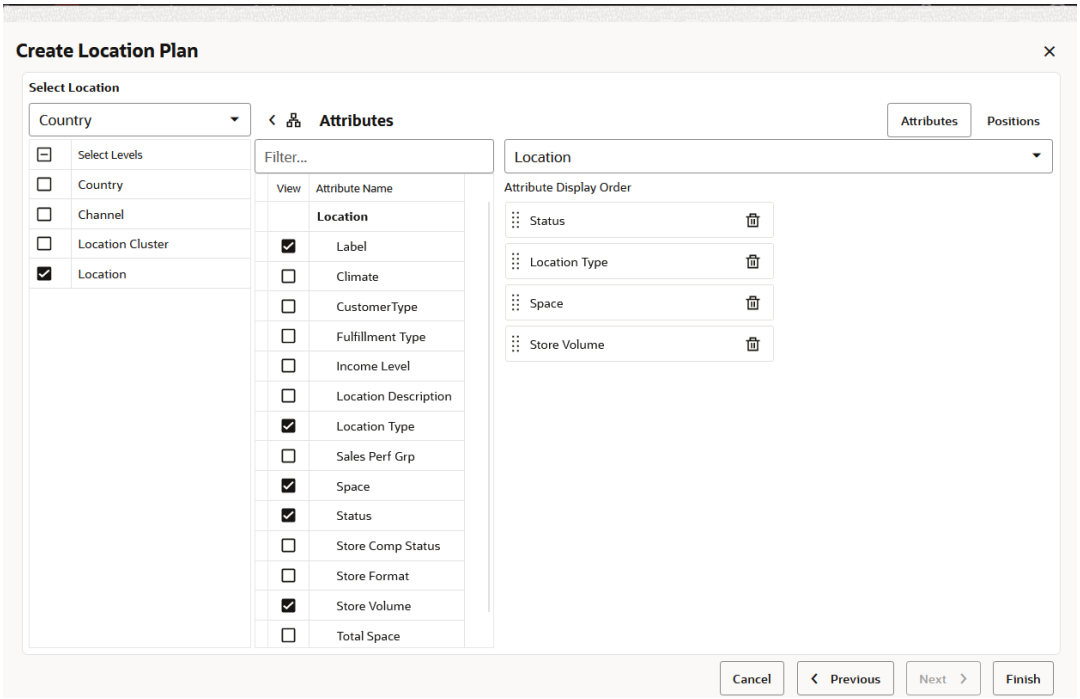


Figure 6-23 Select Attributes to Display



3. The selected attributes display against the position levels on the Position Tab. You can sort the attributes displayed on the wizard using the **Sort** arrow which is available on the header for the attribute.

   You can select and display attributes for more than one position level based on the requirements.

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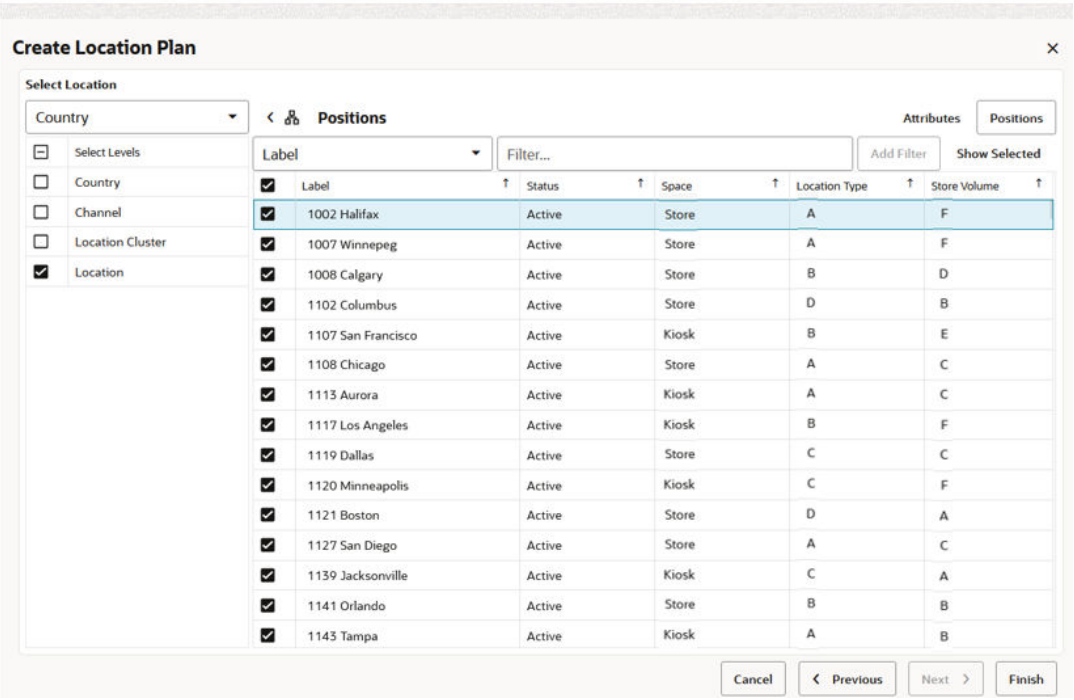
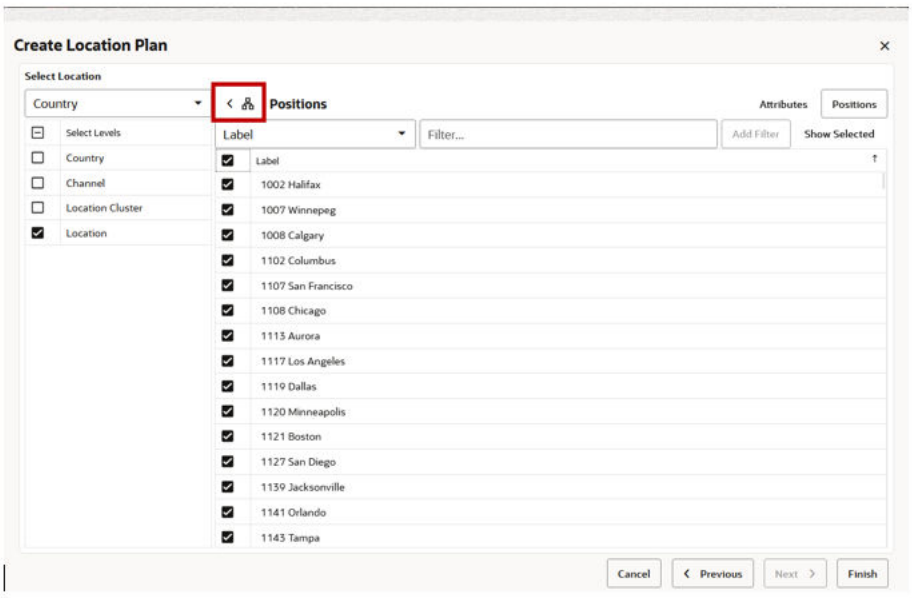
> **Note**
>
> The applied sorting is not reflected in the workbook pivot table. This sorting enables you to make a quick selection of positions in the wizard.

Figure 6-24 Attributes Displayed against the Position Using the Wizard



4. The position level selection side panel can be hidden by using **Collapse** as shown in the following image. By using **Collapse**, this allows you to view more space within the wizard to view the position along with its attributes.

Figure 6-25 Using Collapse to Hide the Position Level Selection Side Panel



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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 list 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. You can search positions with more than one attribute. This helps you group the positions in the wizard based on attributes. The *OR* logic is applied when multiple positions are selected within same Attribute group. For example, if you search for positions with attribute colors of black and red, then the result displays all of the positions with the color red and the color black. The *AND* logic is applied for positions when 2 Attribute Groups are defined. For example, if you search for the position with the Brand X and the color Blue then the result positions are of the Brand X and the color Blue.

Once you have selected the desired attribute Once you have selected the desired attribute from the drop-down list, a list of attribute values associated with the attribute is displayed as the list in the filter area as shown in Figure 6-26. Then you can select the attribute value and click **Add Filter**. You can add multiple attribute filters in this manner.

Figure 6-26 Attribute Values Displayed for the Selected Attribute

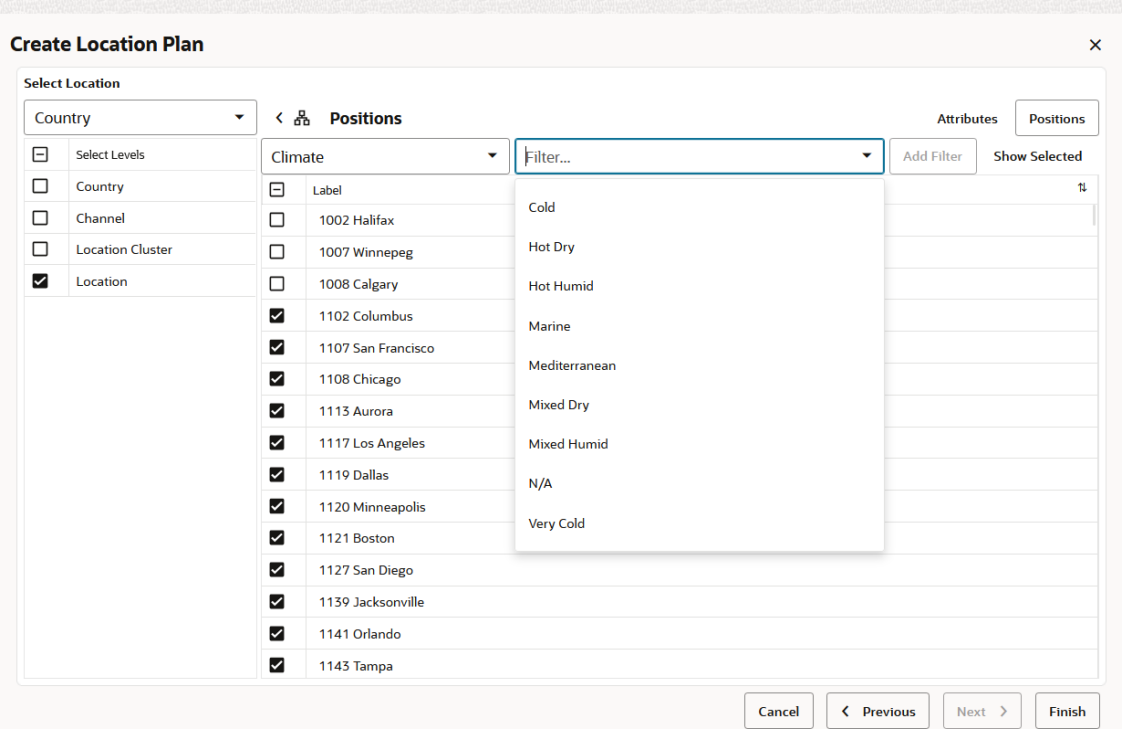

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Figure 6-27 Filter Position - Single Attribute

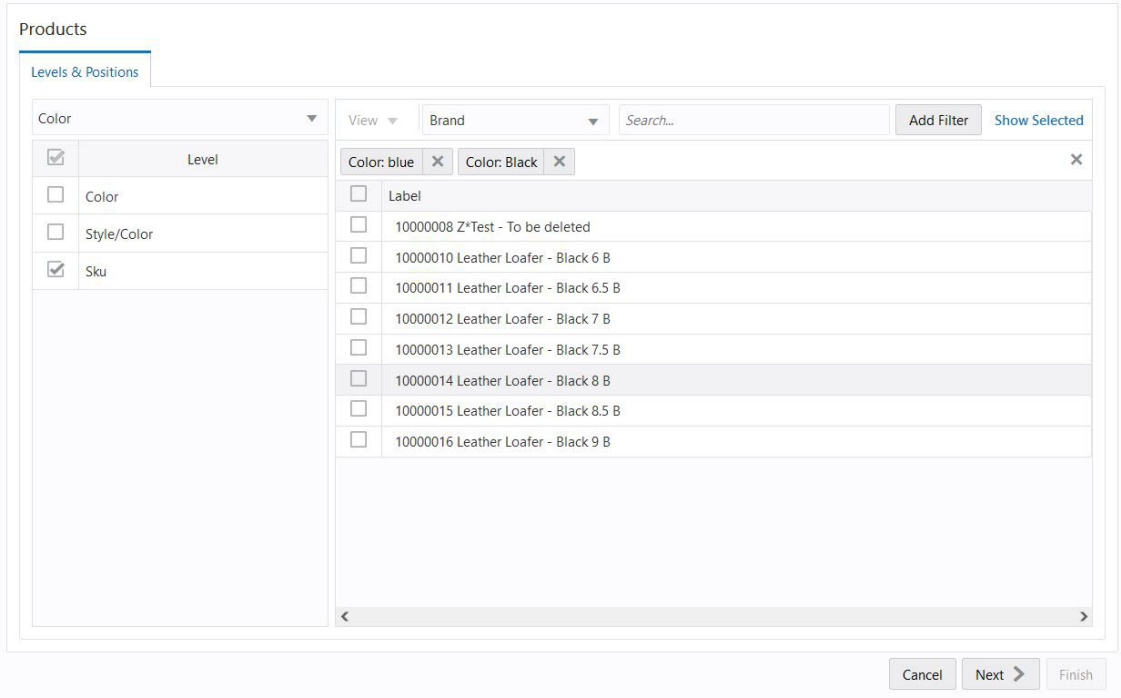

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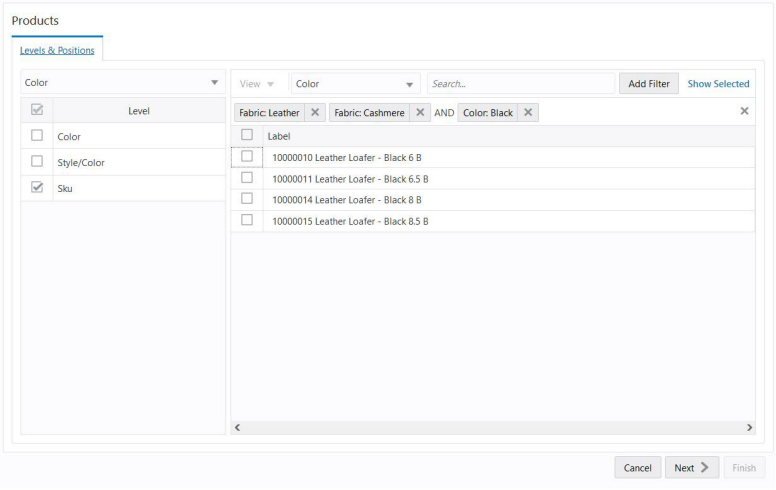
Figure 6-28 Filter Position - Multiple Attributes



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Show Selected Items

You can see the positions selected in wizard with the **Show Selected** link within the wizard. This can help you in understand what needs to be included in your plan and allows you to display only selected positions in wizard. Click the **Show Selected** link to see the list of positions selected along with their parents roll up. When there is no position selected, the **Show Selected** link displays a message that there is no data to display.

Click the **Show All** link to bring back all the positions of the wizard

If an attribute filter is applied, then the **Show Selected** link displays only the position matching the filter criteria which is already selected.

Figure 6-29 Show Selected Link

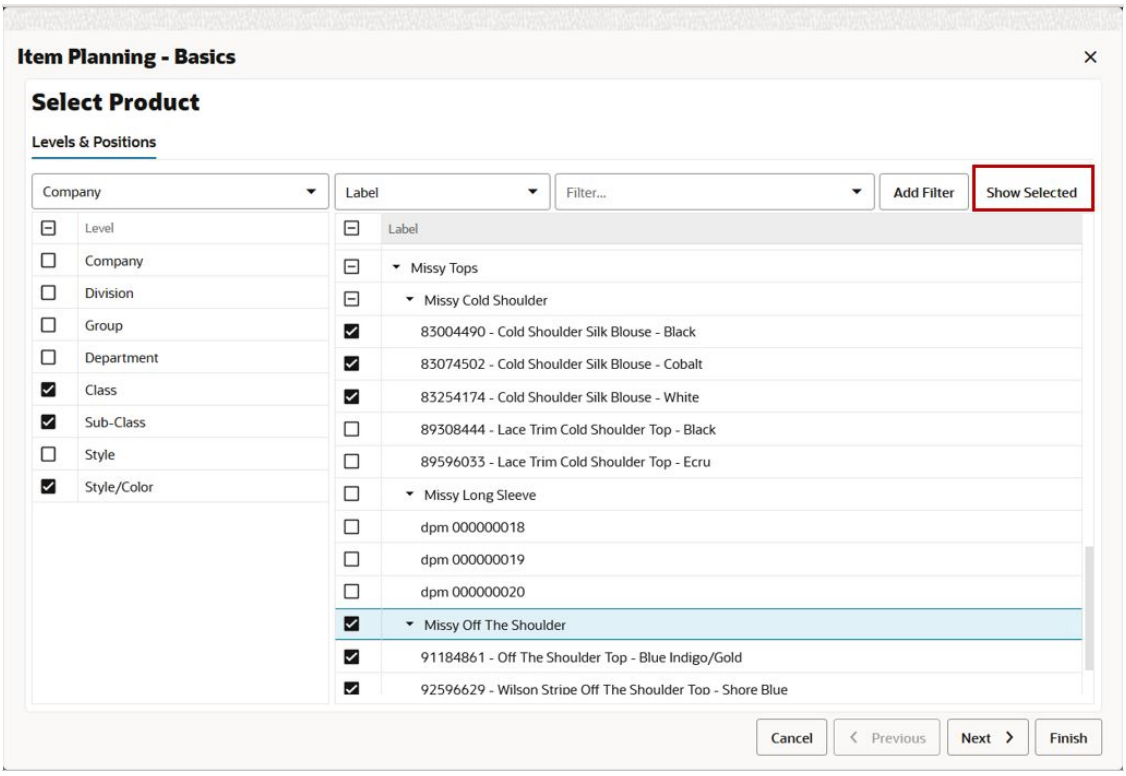

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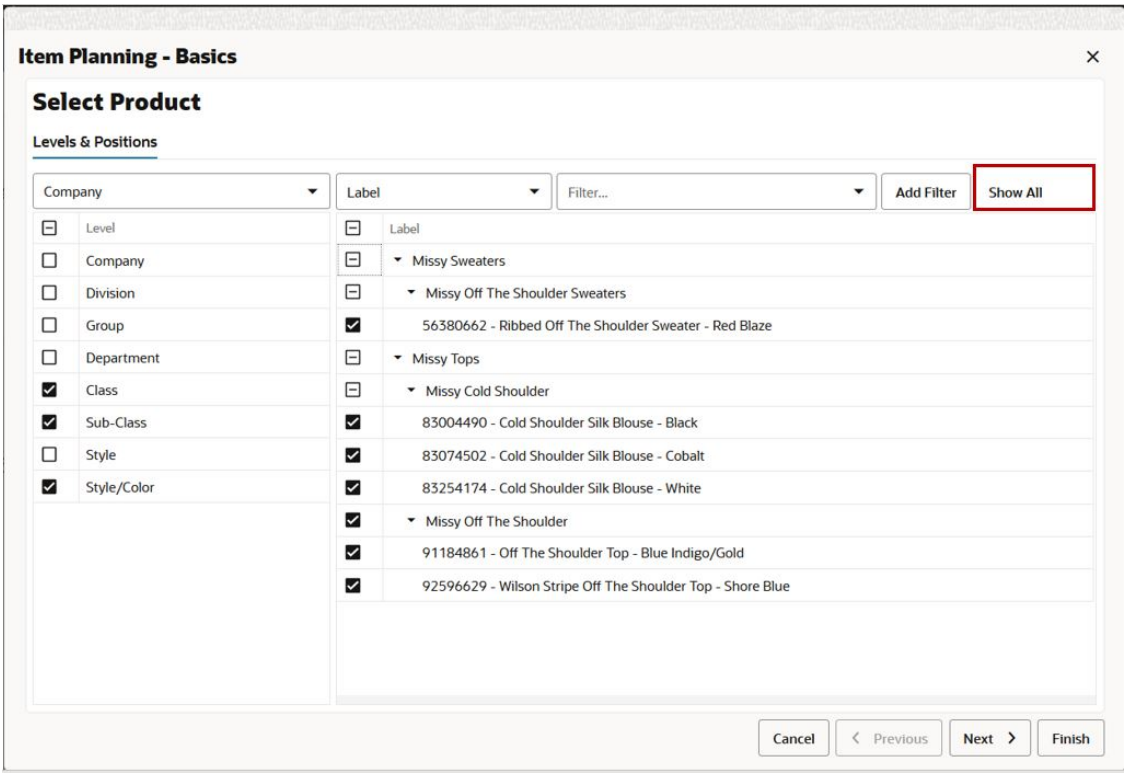
Figure 6-30 Show All



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.

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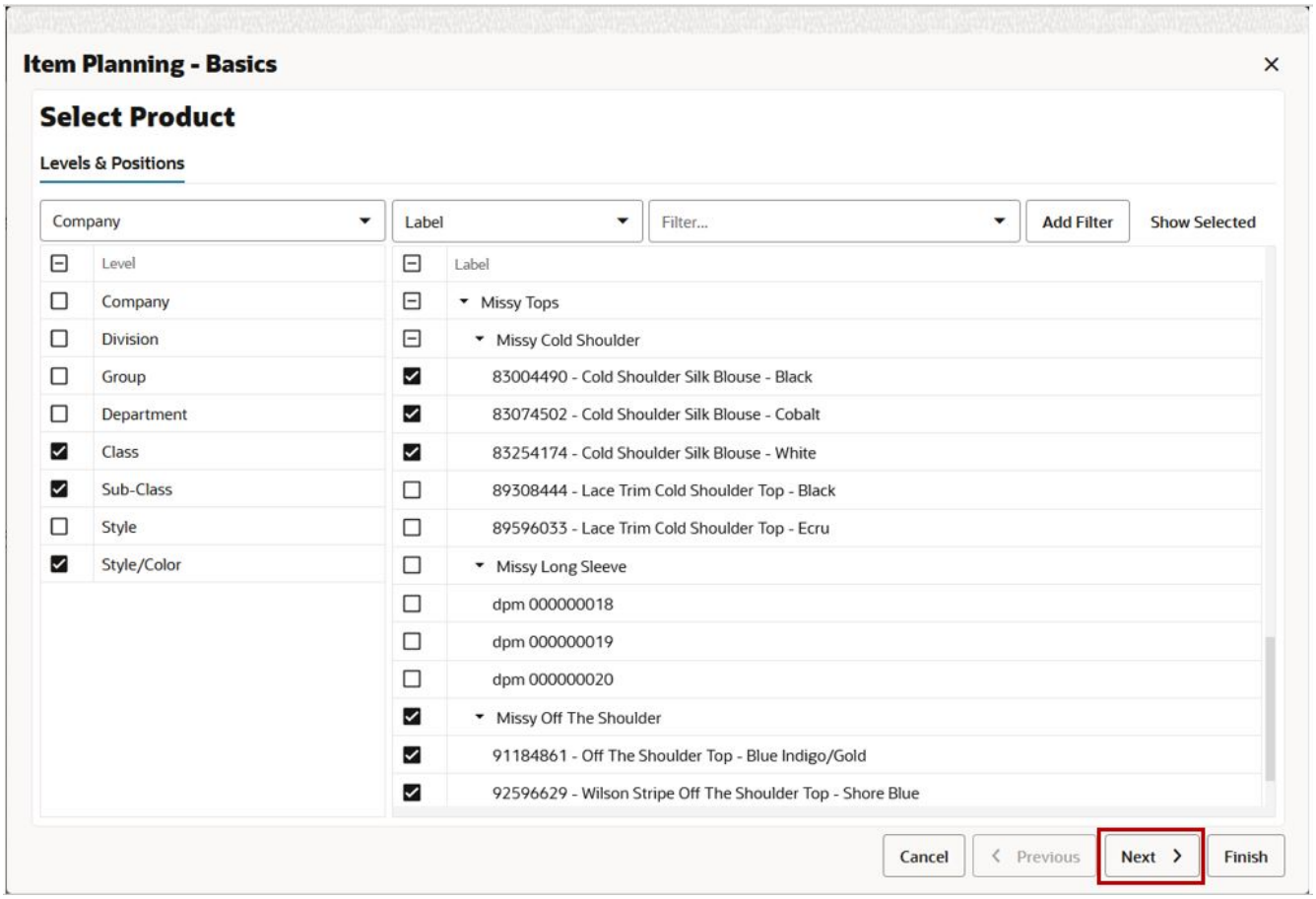
Figure 6-31 Next Dimension



Select and Deselect Positions in the Wizard

You can also select and deselect positions using the context menu (right-click) option. This option is an alternative to select or deselect positions in wizard. You can use context menu option to select or deselect multiple positions simultaneously.

To select a position, right-click on the position and choose **Select**. Similarly, to deselect a position, right-click on a selected position and choose **Deselect**.

When you want to select or deselect multiple positions, select multiple positions by Using a mouse drag with a **Shift** or **Ctrl** key and right-click to opt for **Select** or **Deselect** positions.

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Figure 6-32 Wizard Context Menu Select Position

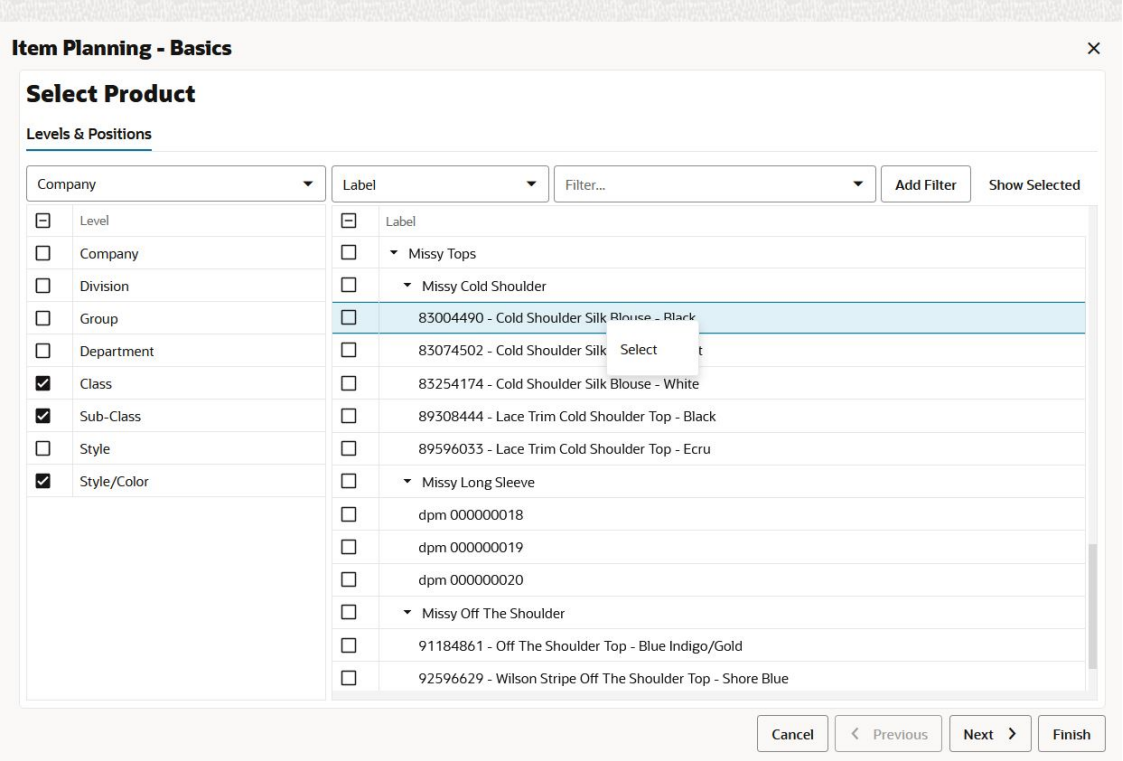
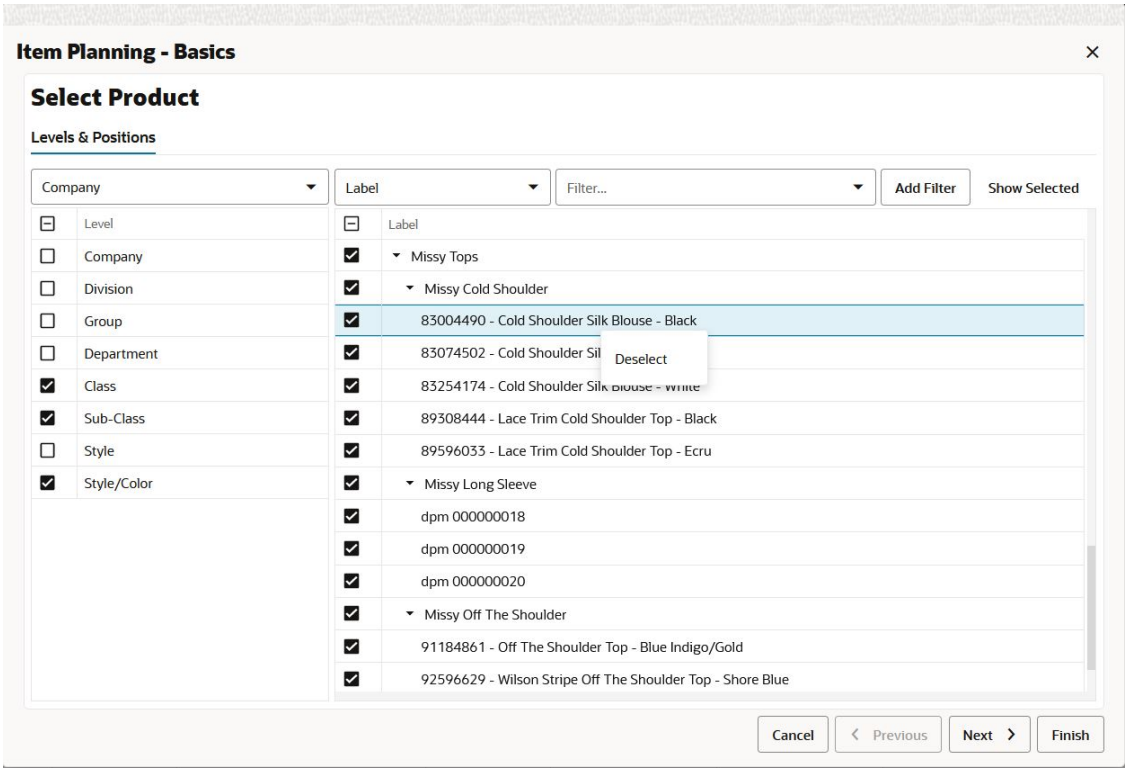


Figure 6-33 Wizard Context Menu Deselect Position



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Collapsing and Expanding Positions in the Wizard

Collapse functionality allows a planner to group the child level positions to parent level. Expand functionality allows a planner to drill-down parent level to view all the child level positions. Collapse and expand function helps you to see all the positions in edit view that is meaningful to you.

To collapse or expand the dimension position you can use context menu (right-click) option. You can right-click on a parent level position and select **Expand** to see all of the child positions. Similarly, to group the child level position, you can right-click on the parent position and select **Collapse**.

Figure 6-34 Wizard Expand Position Level

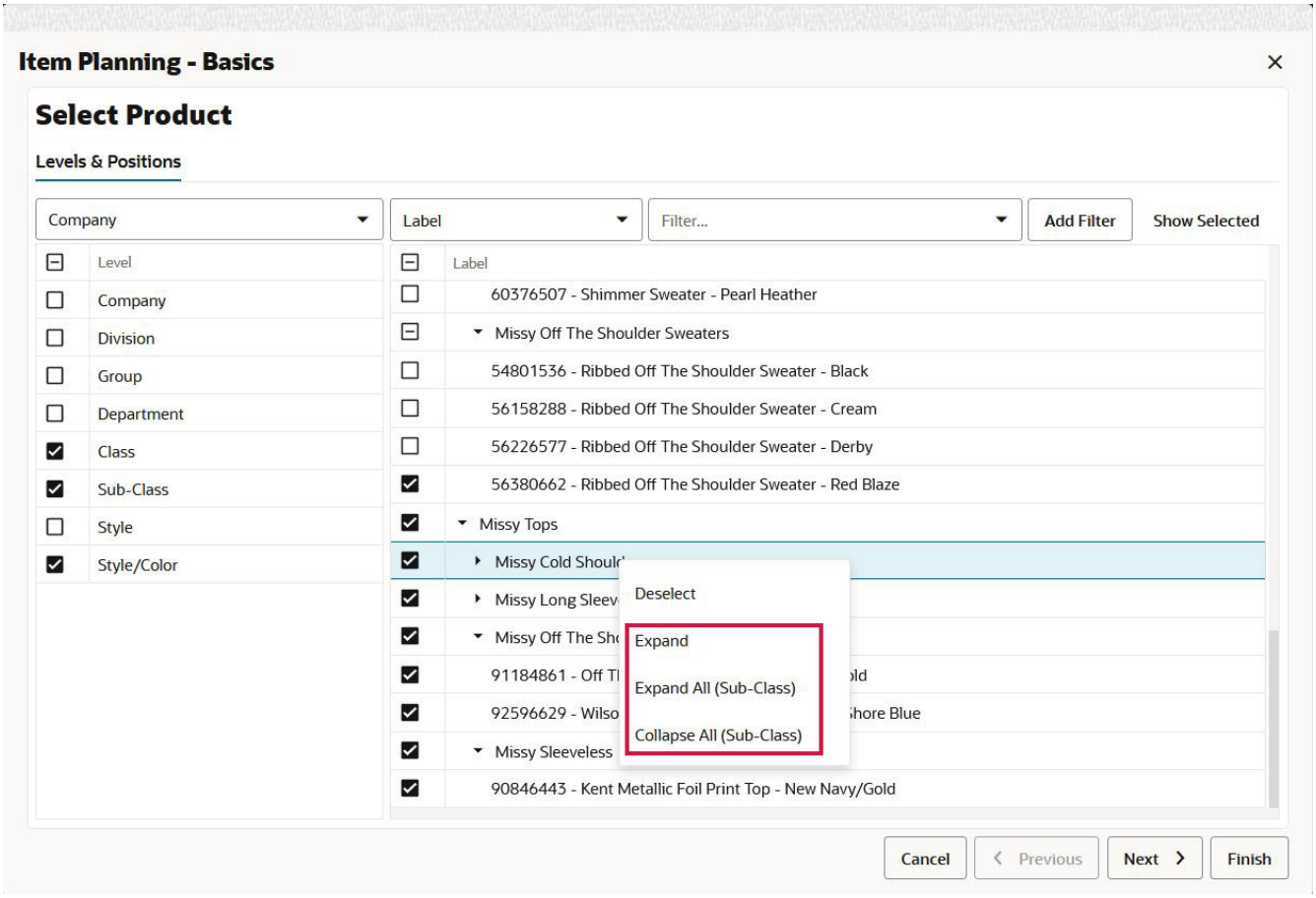

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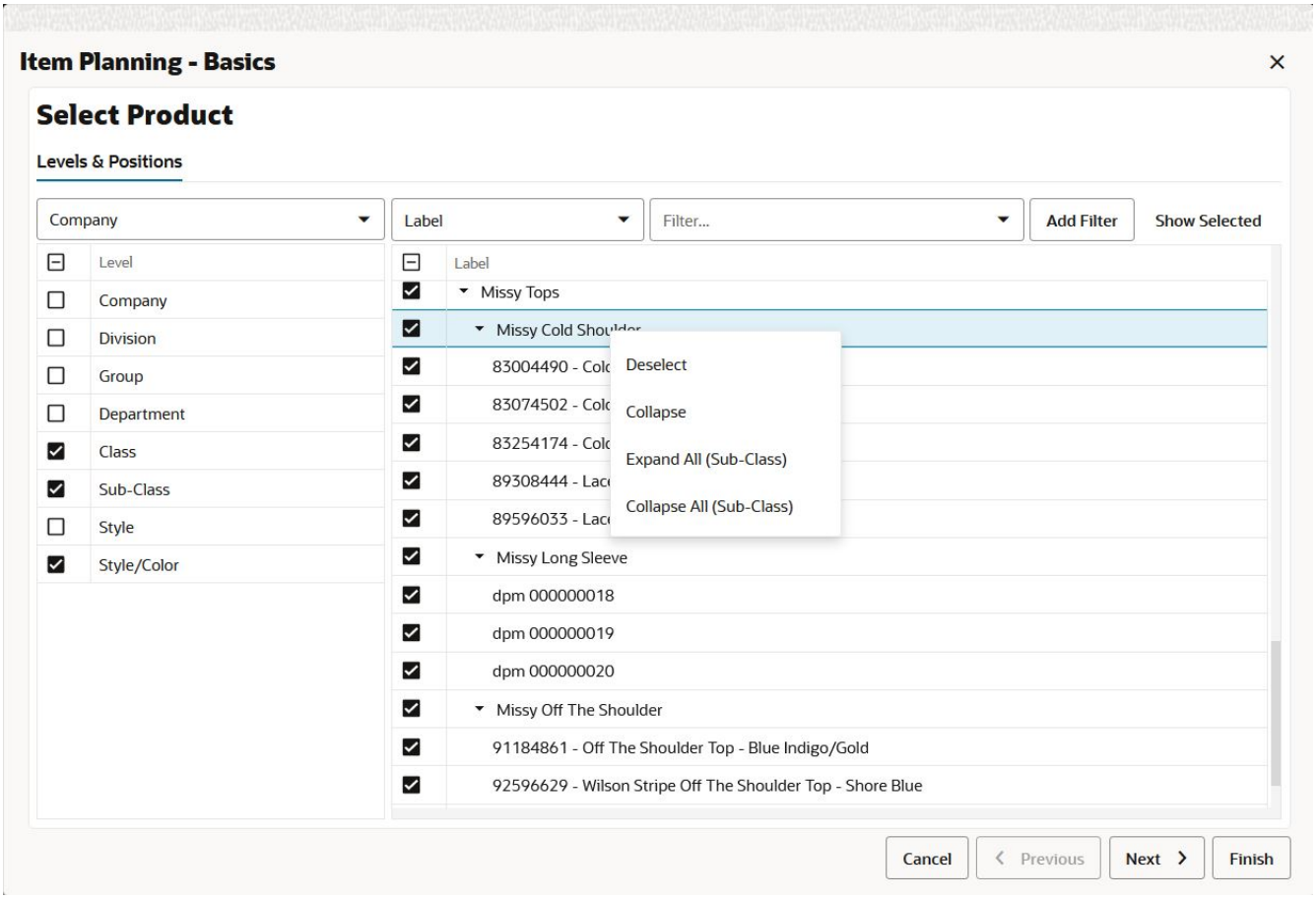
Figure 6-35 Wizard Collapse Position Level



Collapse All and Expand All

The same functionality of collapse has been extended to Collapse All which collapses all the child level positions for the selected dimension level in wizard. And Expand all function expands all the child level position for the selected dimension level in wizard. The selected dimension level is specified next to Collapse All or Expand All in the context menu. With this function, you can quickly collapse or expand view the list of positions as desired.

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Figure 6-36 Wizard Collapse All

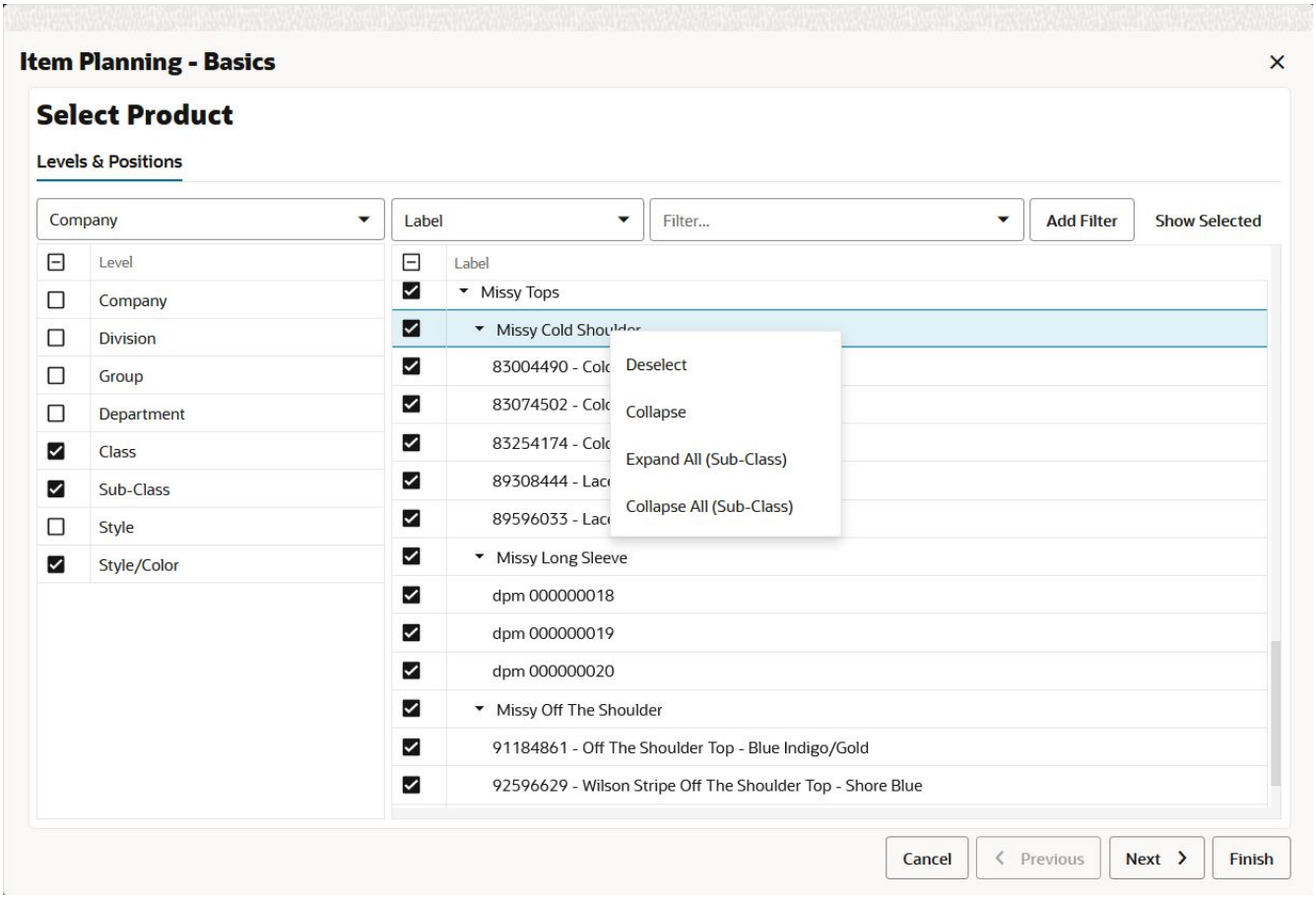

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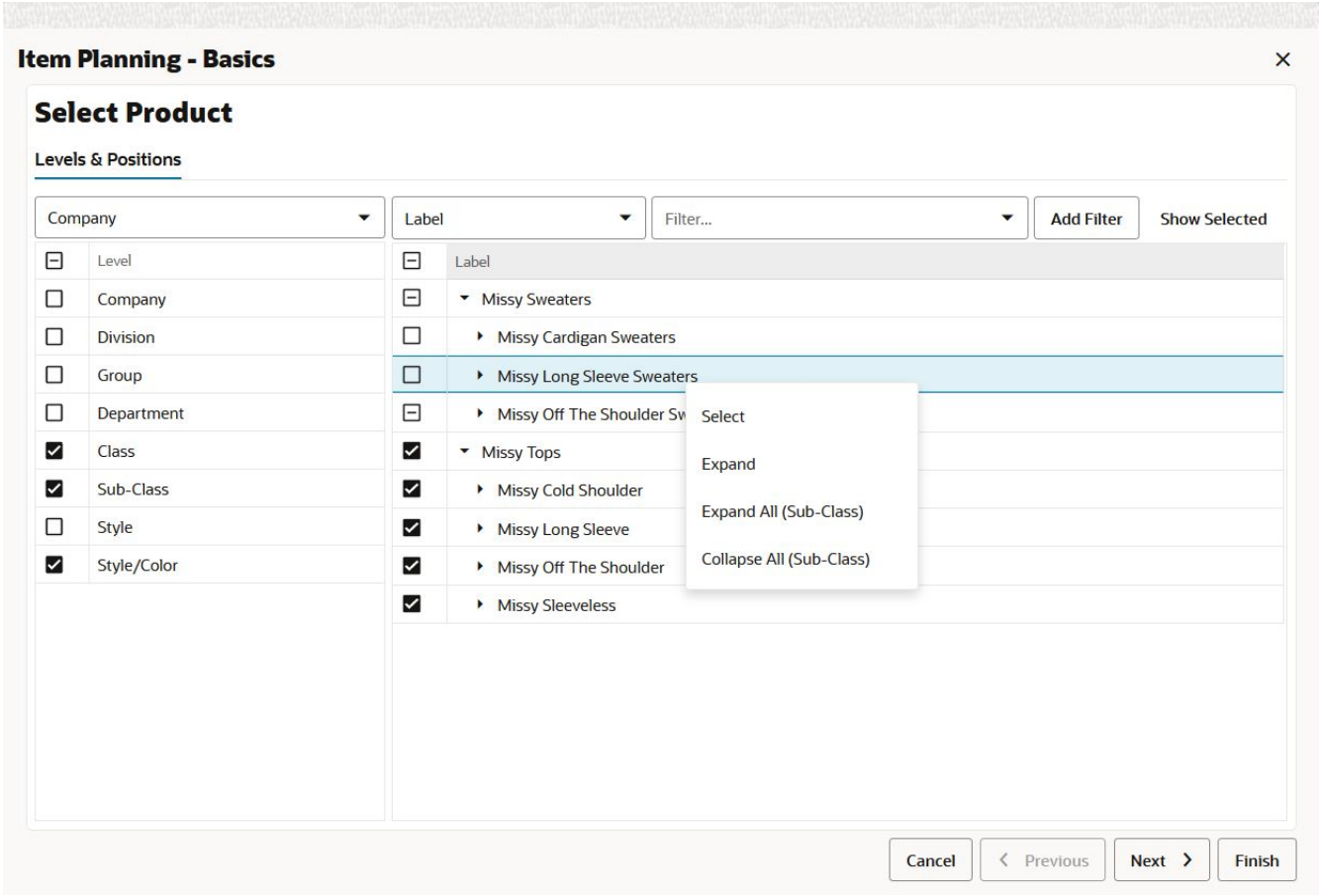
Figure 6-37 Wizard Expand All



Rolling Calendar

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

To use the rolling Calendar, feature you must enable the rolling calendar feature from the Configuration Tool.

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

To use the rolling calendar feature, complete the following:

1. In the calendar step of the workbook wizard, select the **Use Rolling Calendar** option

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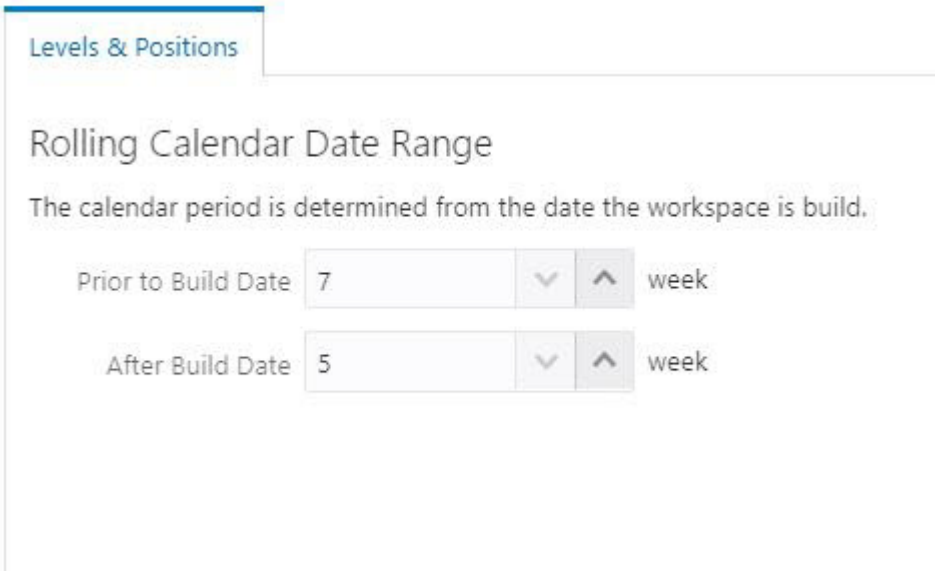
Figure 6-38 Use Rolling Calendar option

2. Set the Rolling Calendar Date Range.

Figure 6-39 Rolling Calendar Date Range



   a. In the Prior to Build Date field, either use the arrows or enter the desired number to select the number of time periods in relation to today's date for the start period. For instance, if the workbook's lowest calendar level is week and you want the time period to begin seven weeks in the past from today's date, you would enter 7.
   b. In the After Build Date field, either use the arrows or enter the number of weeks in relation to today's date that you want the time period to end.

Asynchronous Build

Click **Finish** and 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 see the status of the task in Administration dashboard under Administration Profile.

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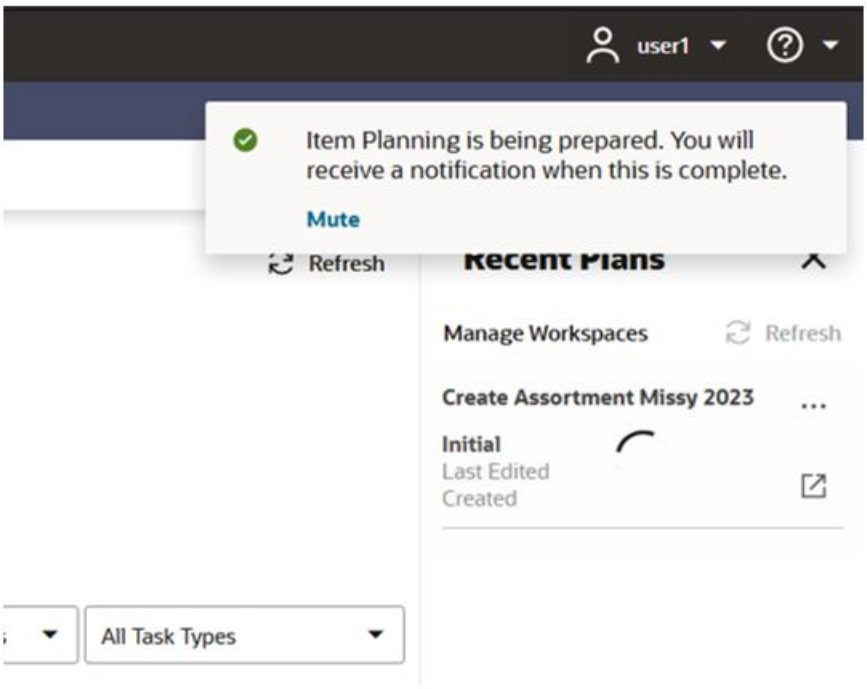
Figure 6-40 Asynchronous Build



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

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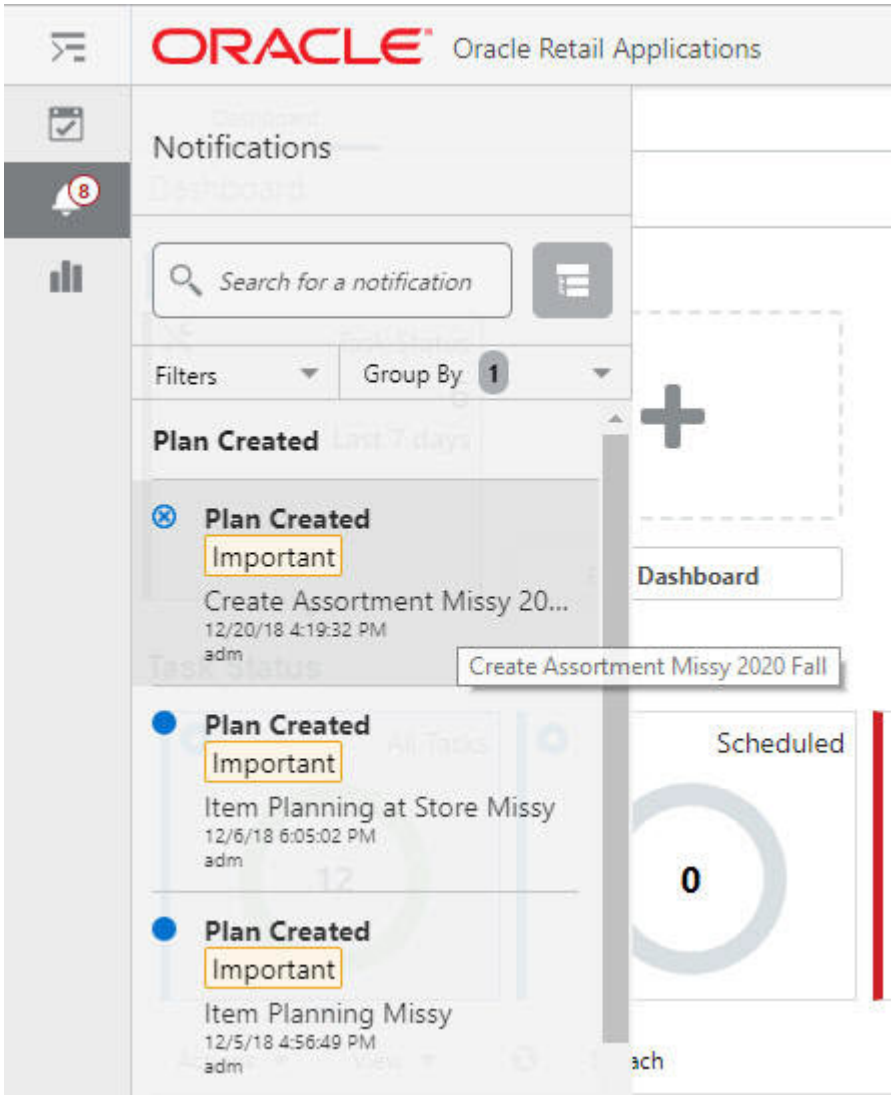
Figure 6-41 Asynchronous Build Notification



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7

Notifications

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

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.

> **Note**
>
> For shared workspaces, Commit notifications for completion or failure are sent to the workspace owner and all users with whom the workspace is shared. Regardless of which user commits the workspace, only the user who commits the workspace will receive the Snackbar and Toast notifications for that Commit.

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 7-1 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

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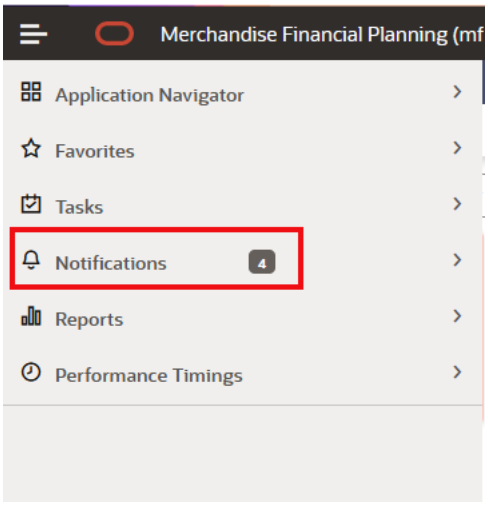
Notifications Panel

> **Note**
>
> For each notification in the Notifications panel, as shown in Figure 7-2,you see the Type, the Severity, a description, the creation date, and the name of the sender.

To view the Notifications panel:

1. Click the **Navigation** menu, then select **Notifications**.

Figure 7-1 Notifications (Bell Icon)



Click **Notifications** (bell icon) beneath the **Navigation** menu to view the list of notifications. The number of notifications is displayed next to **Notifications**.

2. If you want to continue with the work in the current workspace and simultaneously launch the Notifications panel, click **Notifications** (bell icon).

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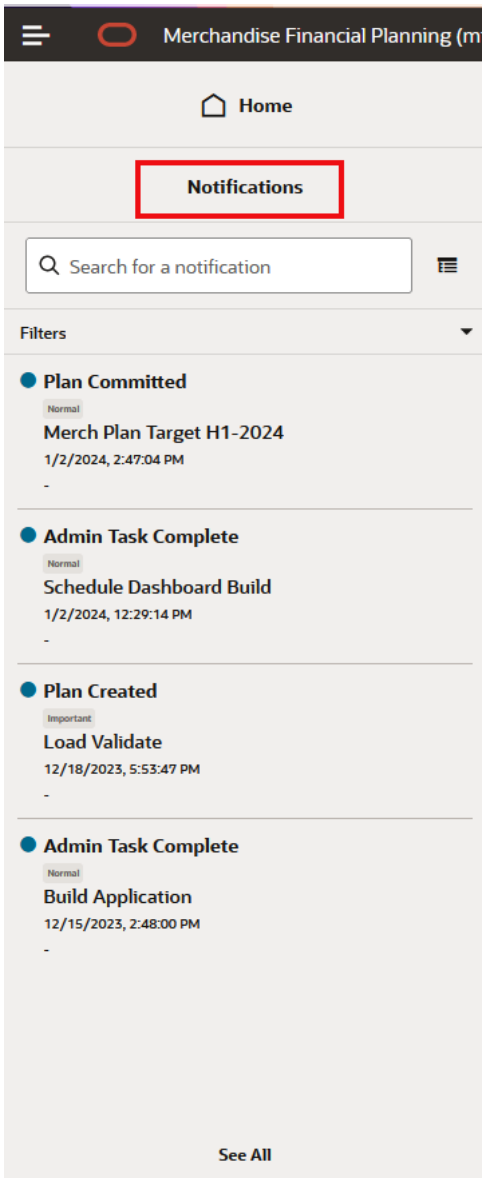
Figure 7-2 Notifications Panel



3. You can use the scroll bar to move up and down the list of notifications.
4. Click **See All** to see all notifications in list form. It opens a **Notifications** tab.

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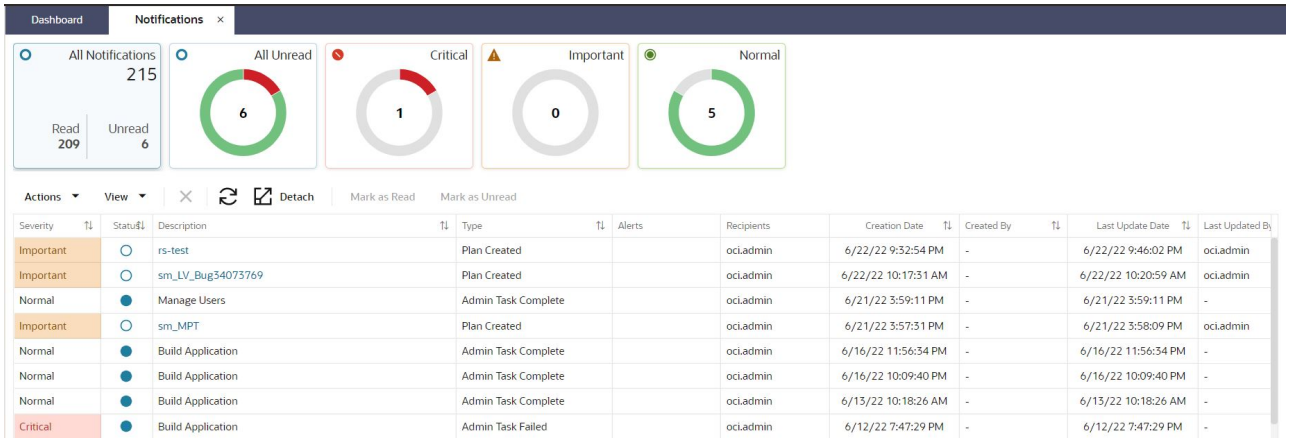
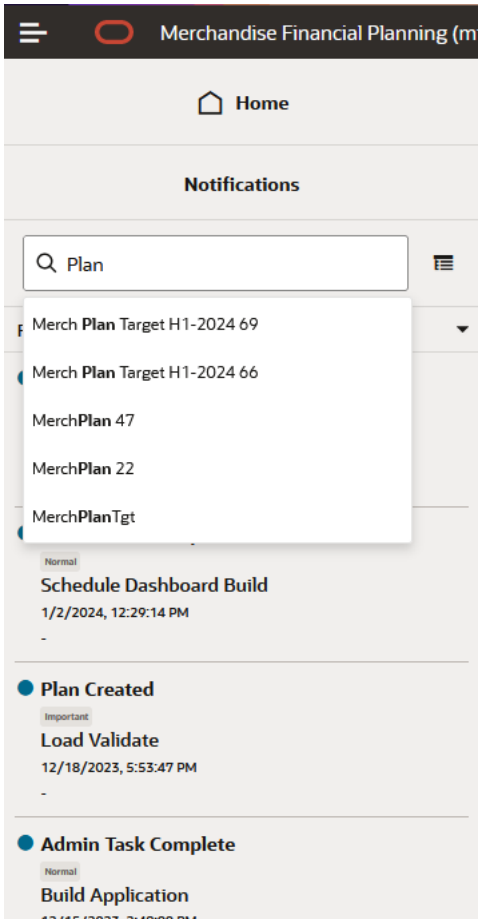
Figure 7-3 Notifications Tab



Searching for Notifications

To search for a specific notification, enter a search term in the Search box. The search term needs to partially match a Plan name in order to show the notifications.

Figure 7-4 Searching for Notifications



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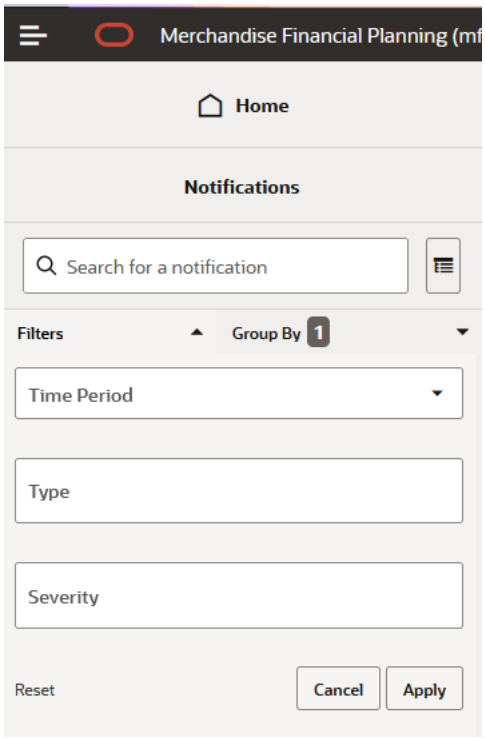
Filtering Notifications

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. Either click **Reset** to clear all of the filters, or click **Apply** to apply the filters.

Figure 7-5 Notifications Filter Options



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

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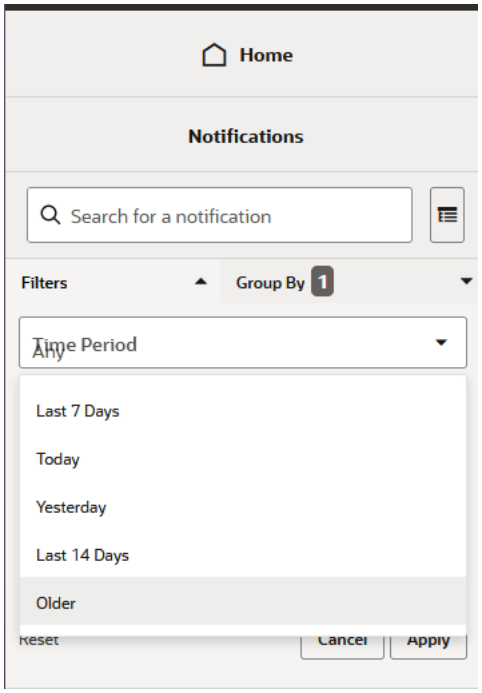
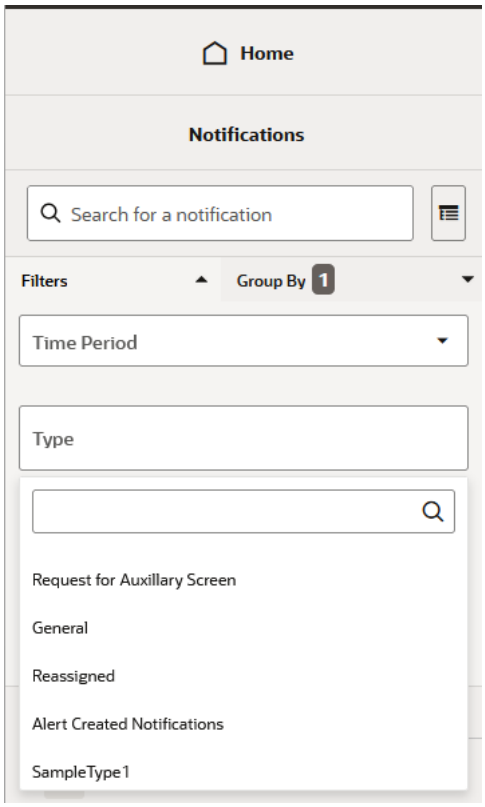
Figure 7-6 Notifications Time Period Filter Options



3. Select a Type filter option.

Figure 7-7 Notifications Type Filter Options



4. Select a Severity filter option.

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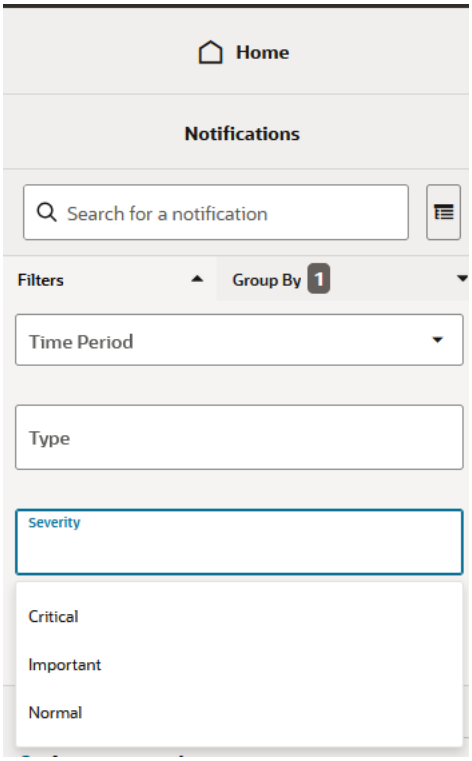
Figure 7-8 Notifications Severity Filter Options



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 window, click **Group View** from the Notifications module.

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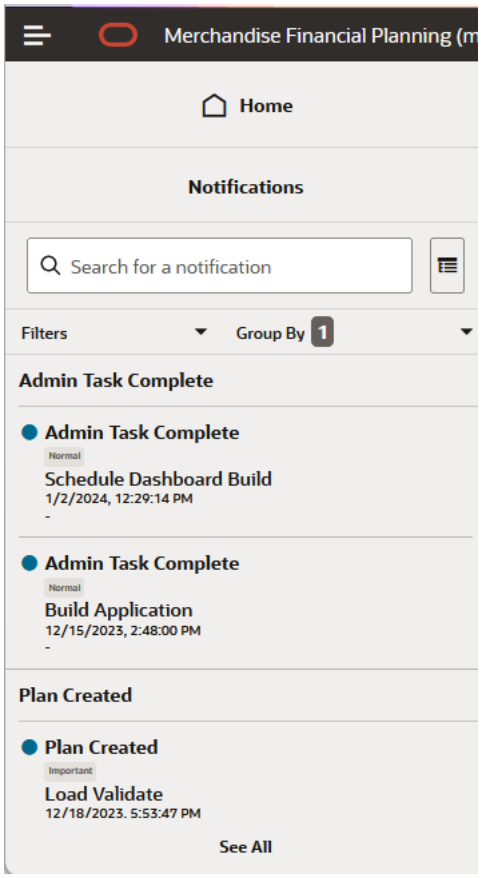
Figure 7-9 Notifications Group View



You can view the Group By next to the filters.

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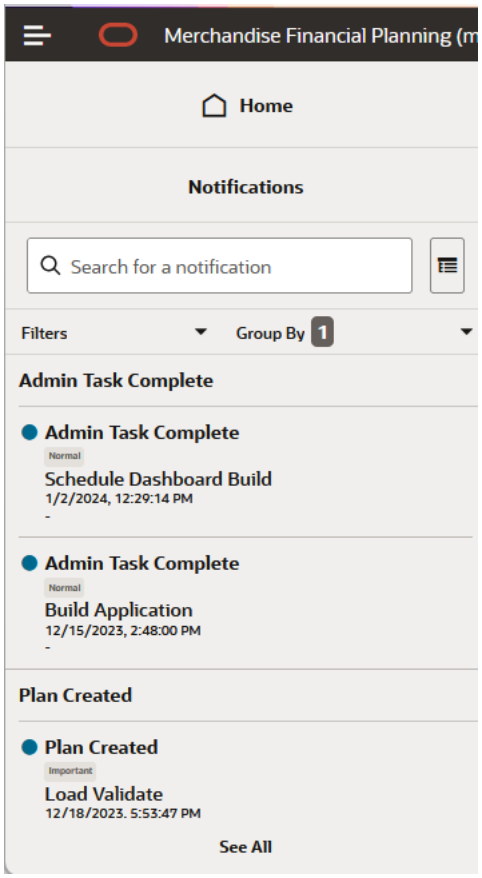
Figure 7-10 Notifications View Group By Type



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.

You can select all the notifications using shortcut **Ctrl+A** and then perform delete actions to delete all notifications.

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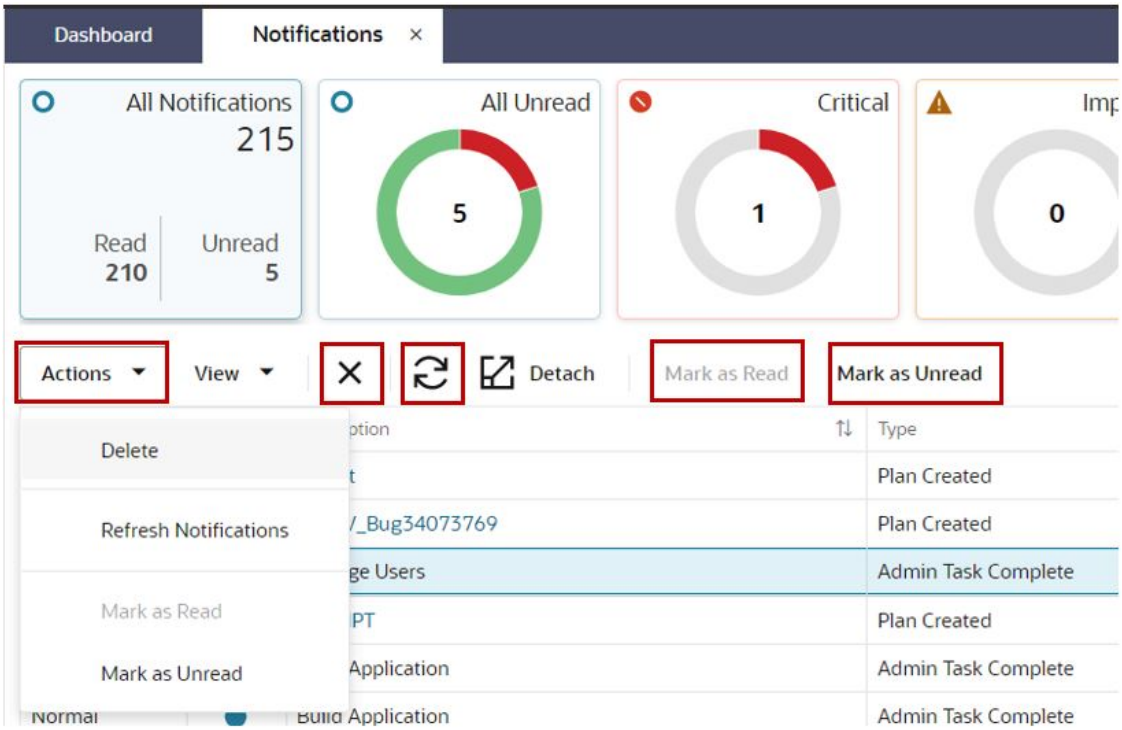
Figure 7-11 Notifications Tab List of Actions



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 window 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.

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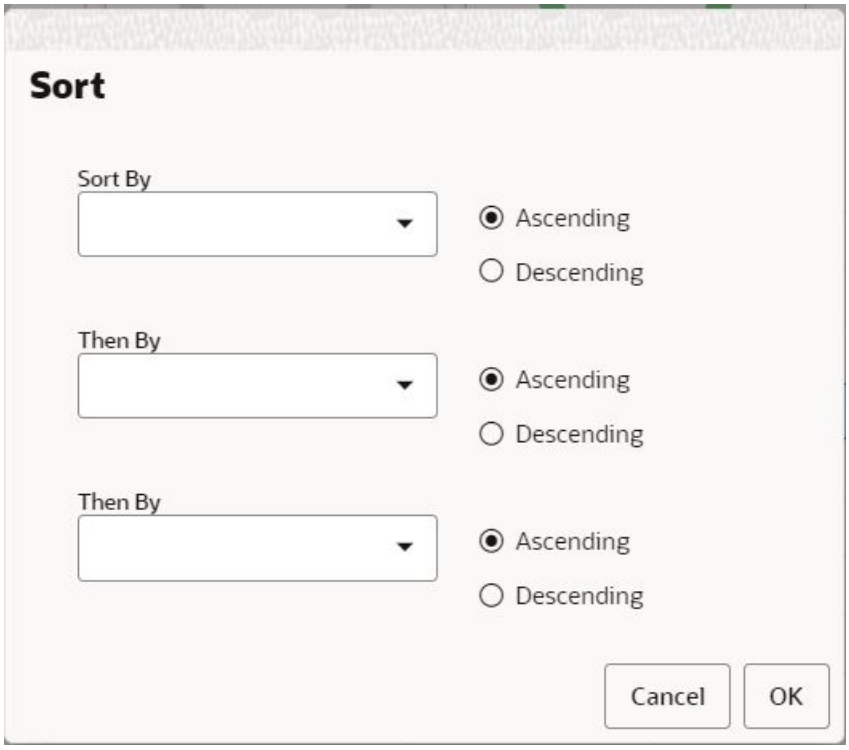
Figure 7-12 Sort Notifications Window



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 7-2 lists all the Snackbar and Toast notifications.

The failed task and error message displays more details about the error or failure. On the Snackbar or Toast message, click **More Details** to find the reason for failure or error along with the corrective action. You can manage your notifications by enabling or disabling them through the User Preference module. You can also mute Snackbar notifications by selecting **Mute** from the message dialog. For additional information refer to the section, User Preference.

Table 7-2 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]

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Table 7-2 (Cont.) Snackbar and Toast Notifications

Notification	Description
Commit successful	Commit 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.
Commit initiated after custom menu is successful	Commit is initiated by the successful run of a custom menu.
Admin task submitted	[Task] has been submitted. You will receive a notification when this is complete.
Plan tab/window closed	[Plan] closed.
Internet Slow Connection	Your internet connection is experiencing increased latency. This may make this application feel less responsive.
Connection Restored	Your internet connection latency is back to a normal level.
Format Save Successful	Format has been successfully saved for user / group / template {0}
Format Delete Successful	Format has been successfully deleted for user / group / template {0}

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8
Editing Views

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

Launching Edit View

To open Edit View, click any of the following places. If you click any of the dimension tiles in the Details tab of the Edit View window, you launch Edit View. Any other way launches the Setup tab of the Edit View window. Refer to Figure 8-1 and Figure 8-2.

- **Edit** on the View Title Bar
- **Edit** on the dimension tiles in an open view
- **Edit** on a view tile in the View Management Drawer
- **Edit** on the Detached view
- **New View** in the View Management Drawer

Figure 8-1 Launching Edit View

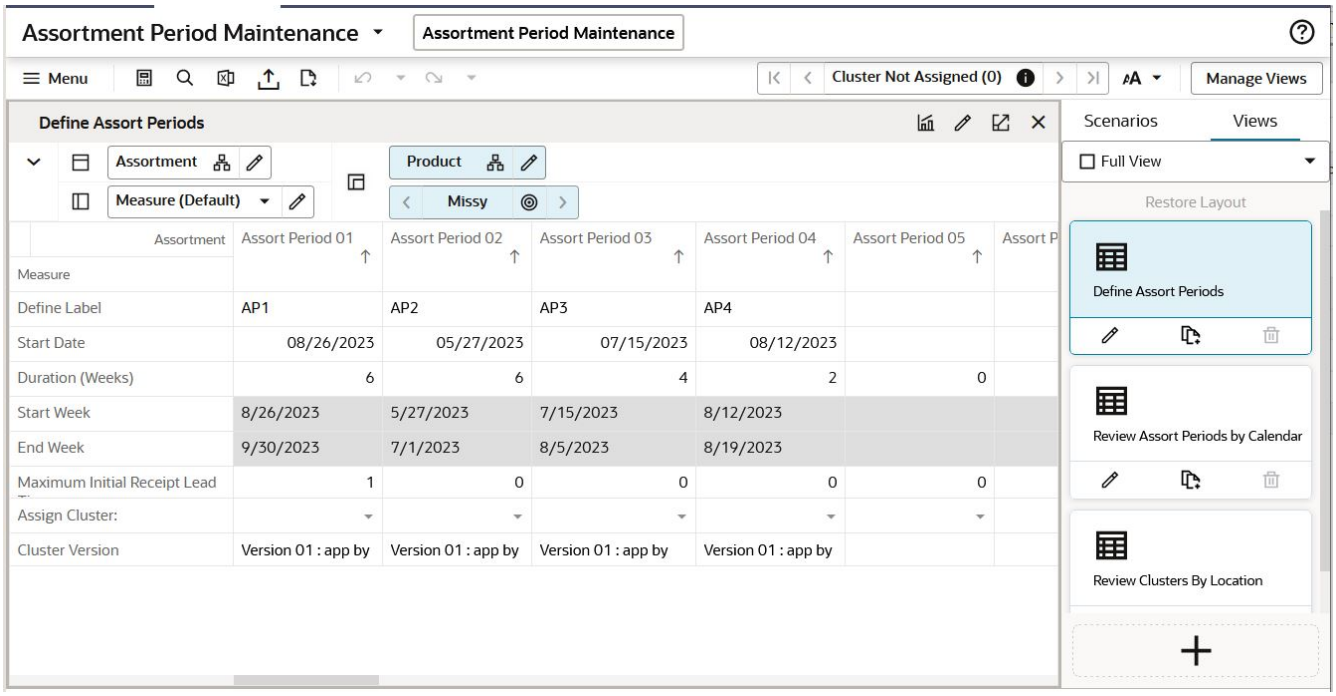

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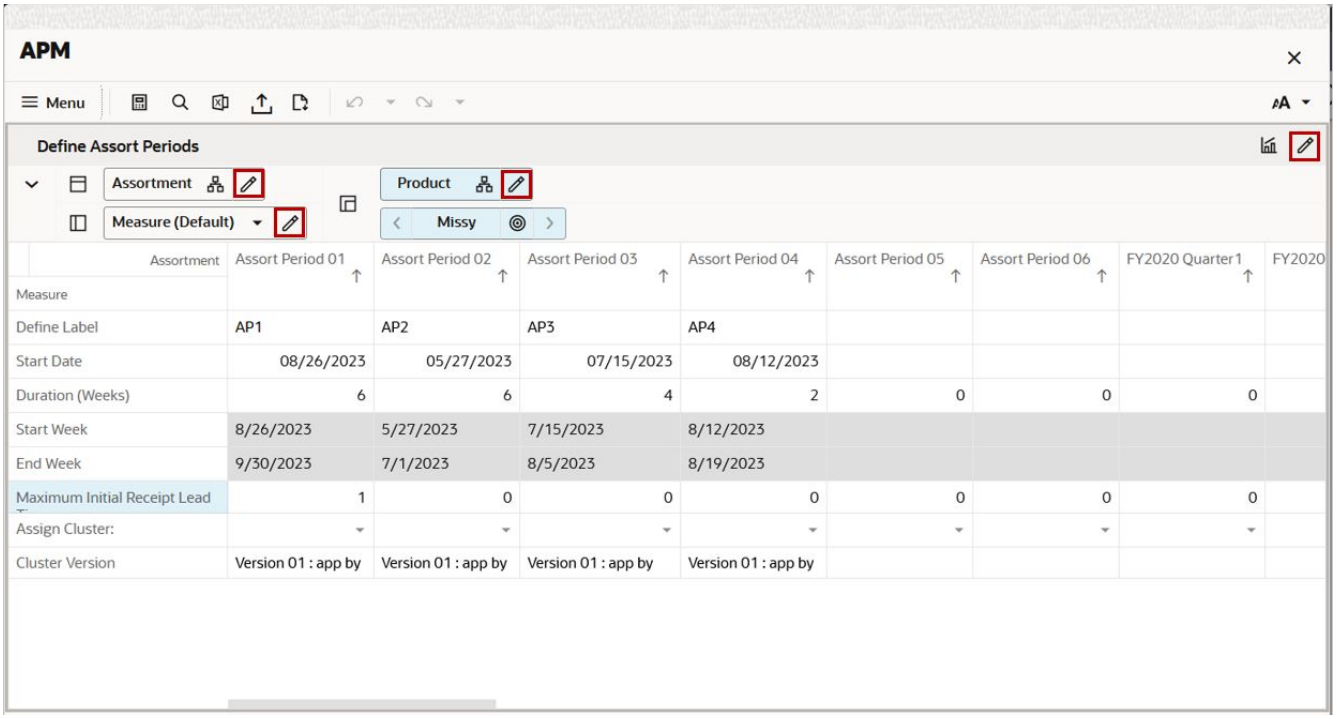
Figure 8-2 Launching Edit View from the Detach View

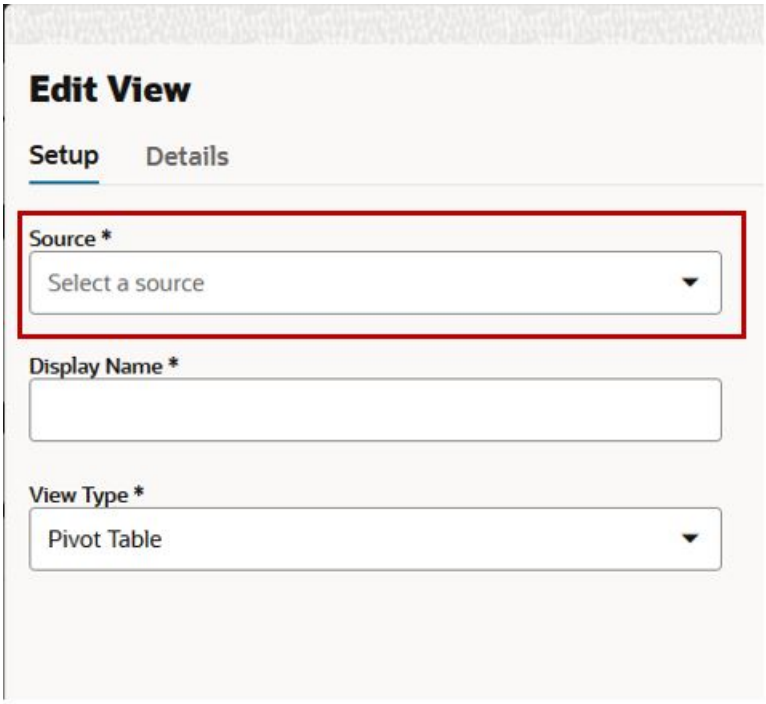


Assortment / Measure	Assort Period 01	Assort Period 02	Assort Period 03	Assort Period 04	Assort Period 05	Assort Period 06	FY2020 Quarter1	FY2020
Define Label	AP1	AP2	AP3	AP4				
Start Date	08/26/2023	05/27/2023	07/15/2023	08/12/2023				
Duration (Weeks)	6	6	4	2	0	0	0	
Start Week	8/26/2023	5/27/2023	7/15/2023	8/12/2023				
End Week	9/30/2023	7/1/2023	8/5/2023	8/19/2023				
Maximum Initial Receipt Lead	1	0	0	0	0	0	0	
Assign Cluster:								
Cluster Version	Version 01 : app by	Version 01 : app by	Version 01 : app by	Version 01 : app by				

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 8-3 Select Source in Edit View While Adding a New View



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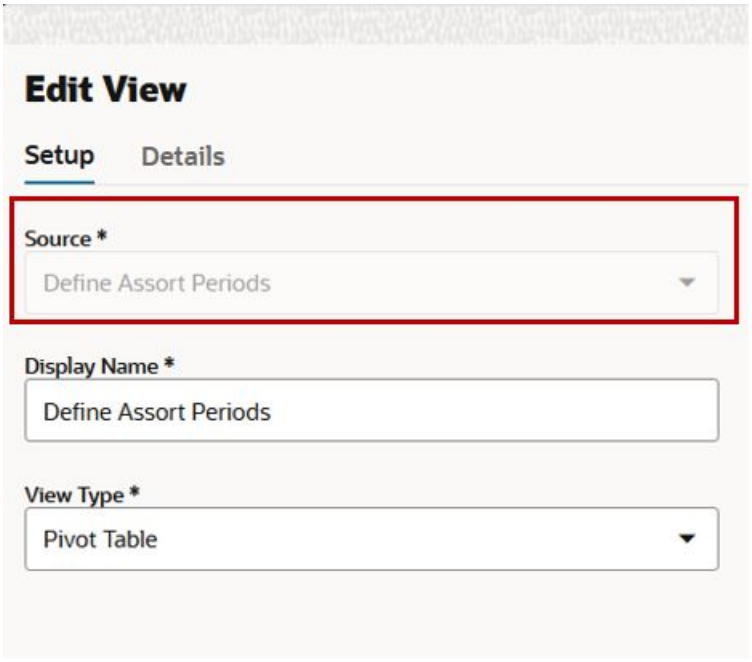
Any other way of launching edit view except Add View displays the source as an uneditable field. You will not be able to change the source of a view.

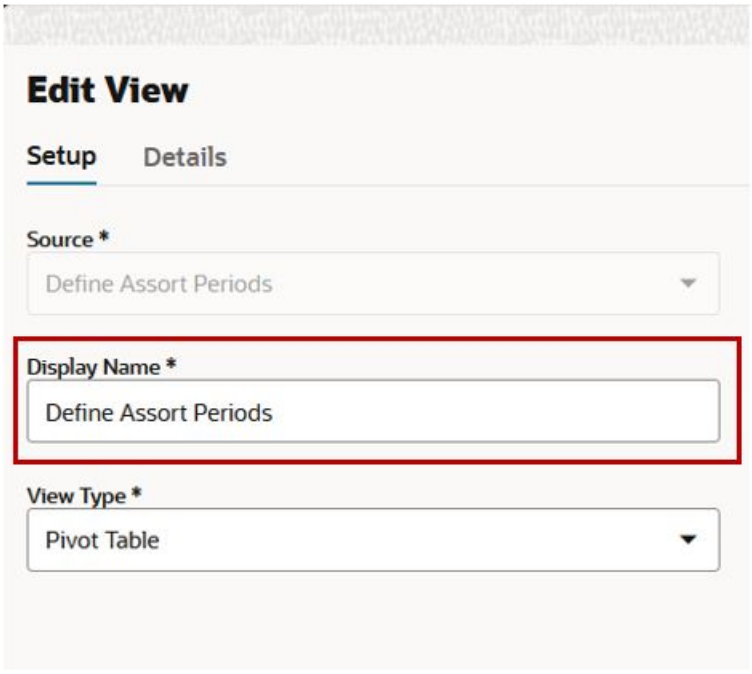
Figure 8-4 Display Source in Edit View While Editing an Existing View



Display Name

You can change the view display name using the Edit View as shown in Figure 8-5. You must be in the Setup tab of Edit View to complete this action.

Figure 8-5 Display Name in Edit View



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View Type

You can change the view type using the Edit View as shown Figure 8-6. 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

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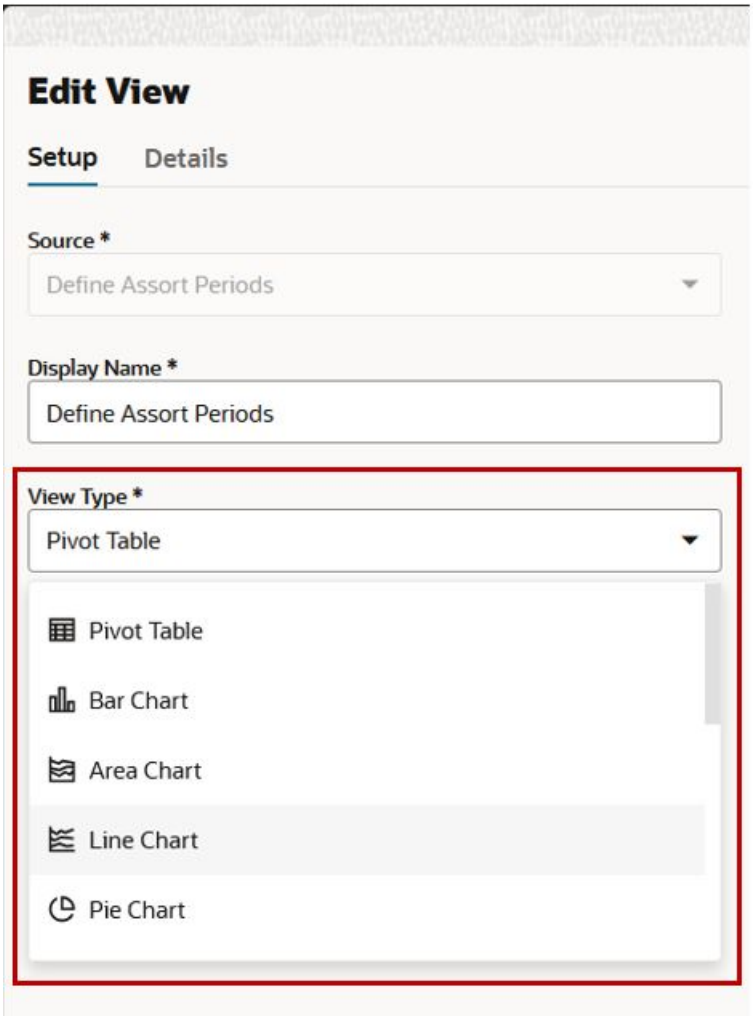
Figure 8-6 View Type in Edit View



Moving and Re-Ordering Dimension Tiles

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

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

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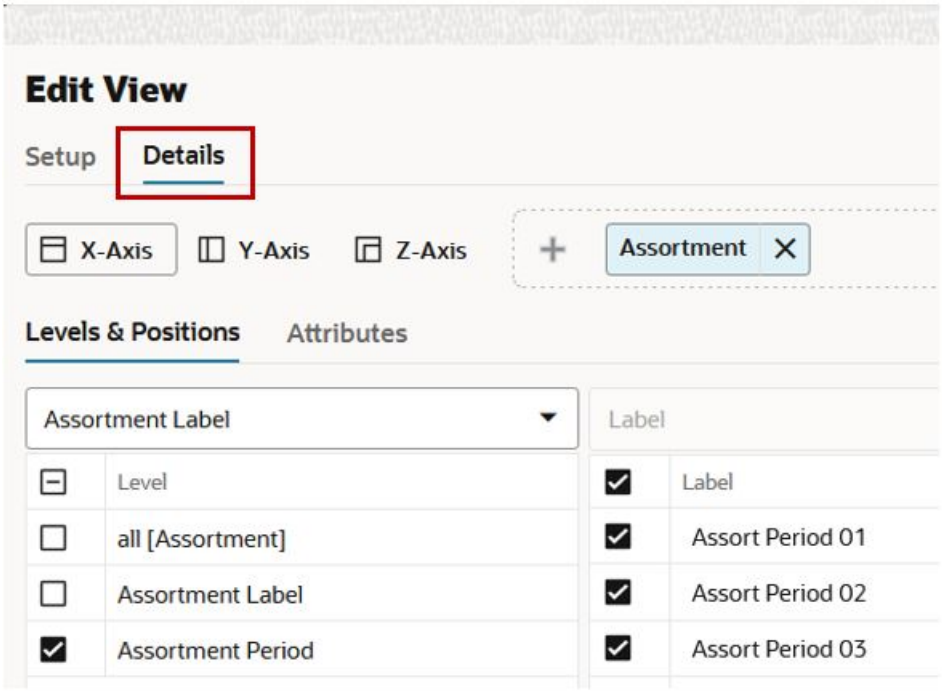
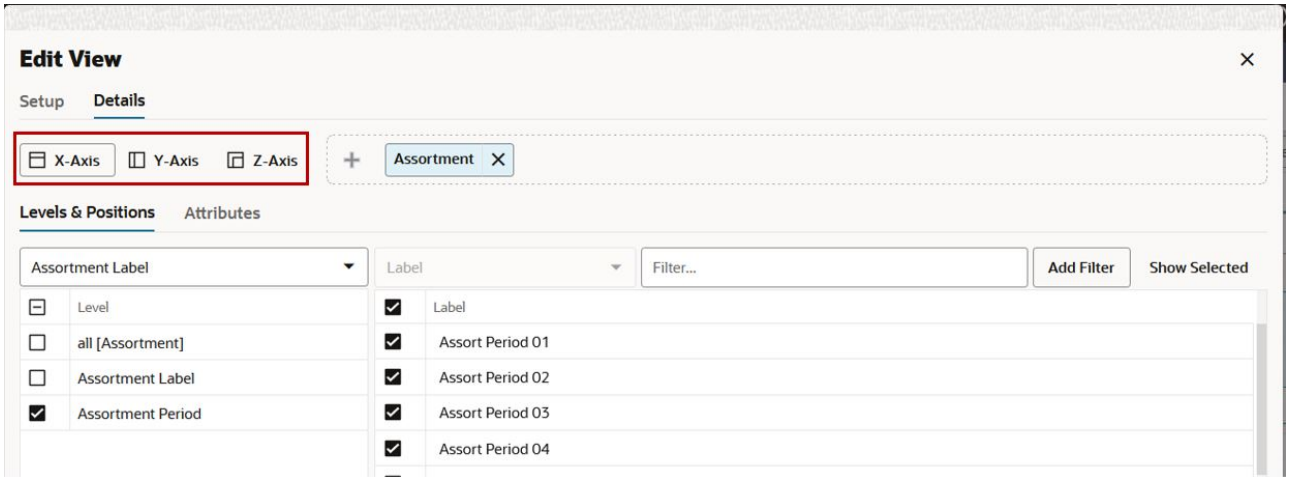
Figure 8-7 Edit View Details



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

Figure 8-8 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.

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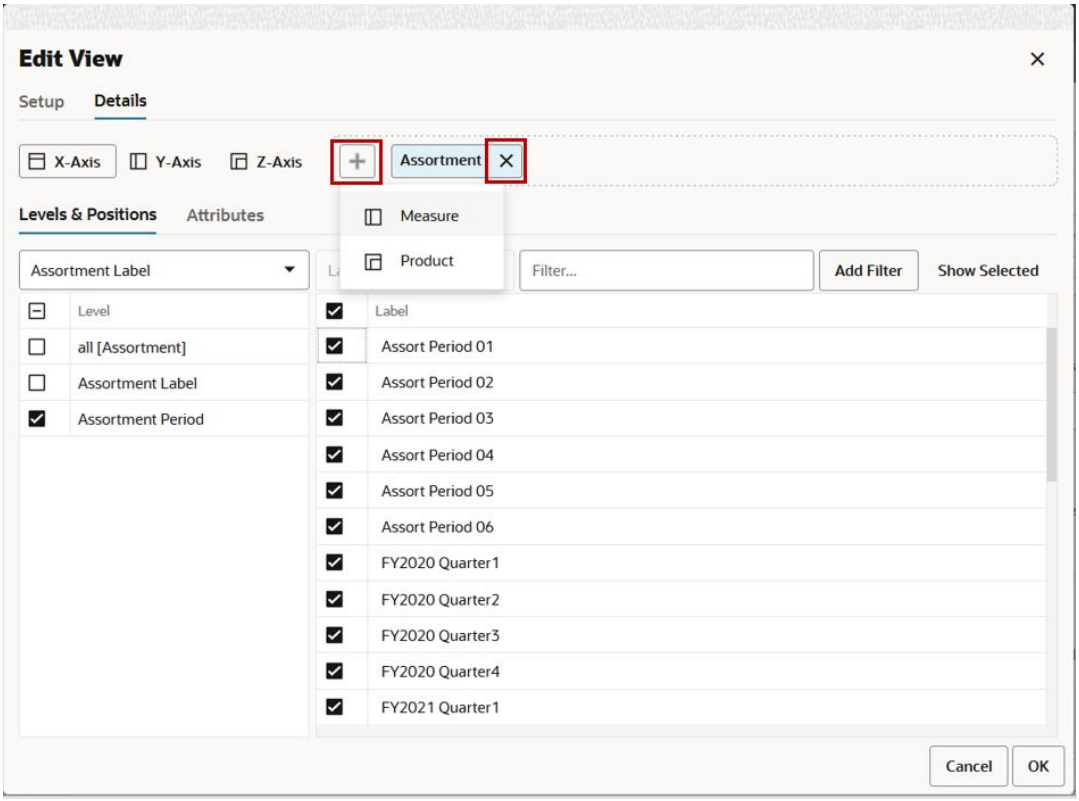
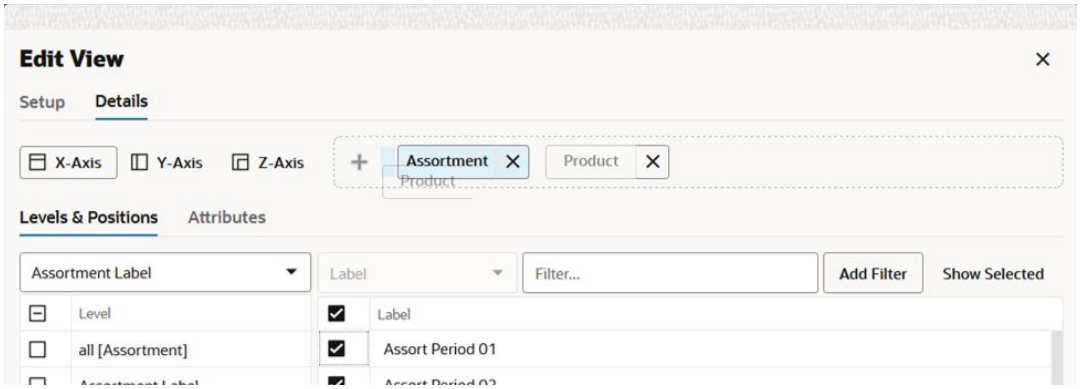
Figure 8-9 Add or Remove Dimensions



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 8-10 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.

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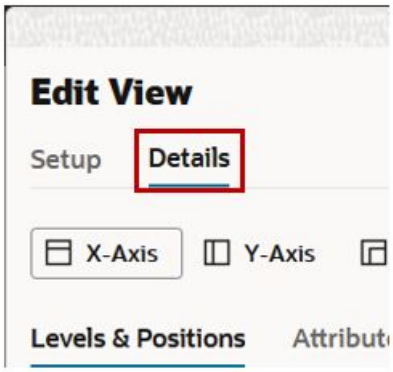
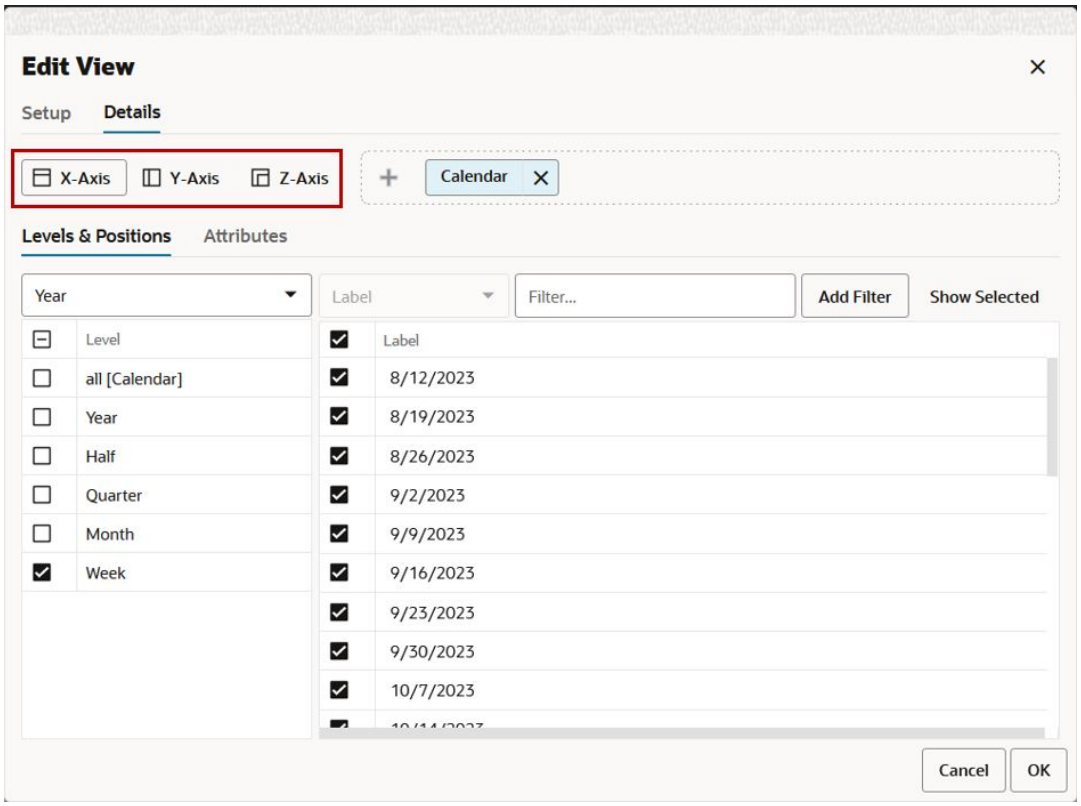
1. Once Edit View is open, click the **Details** tab to see the different dimensions, axes, levels, positions, and measures.

Figure 8-11 Open Details Tab



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

Figure 8-12 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).

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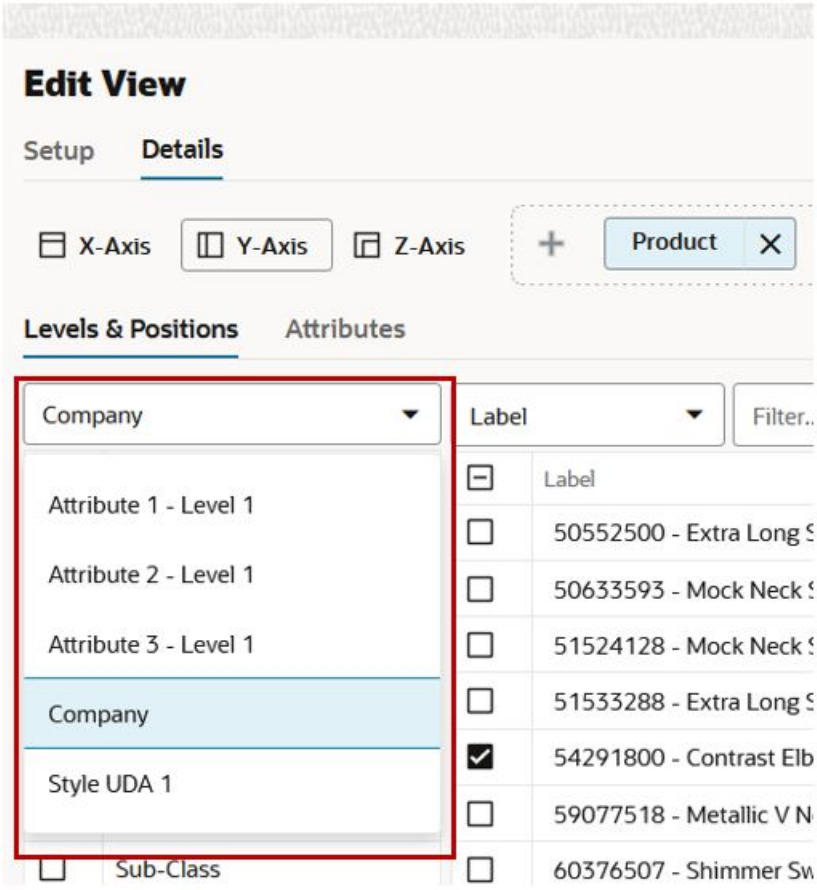
Figure 8-13 Branch Options (Company vs Department Group)



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

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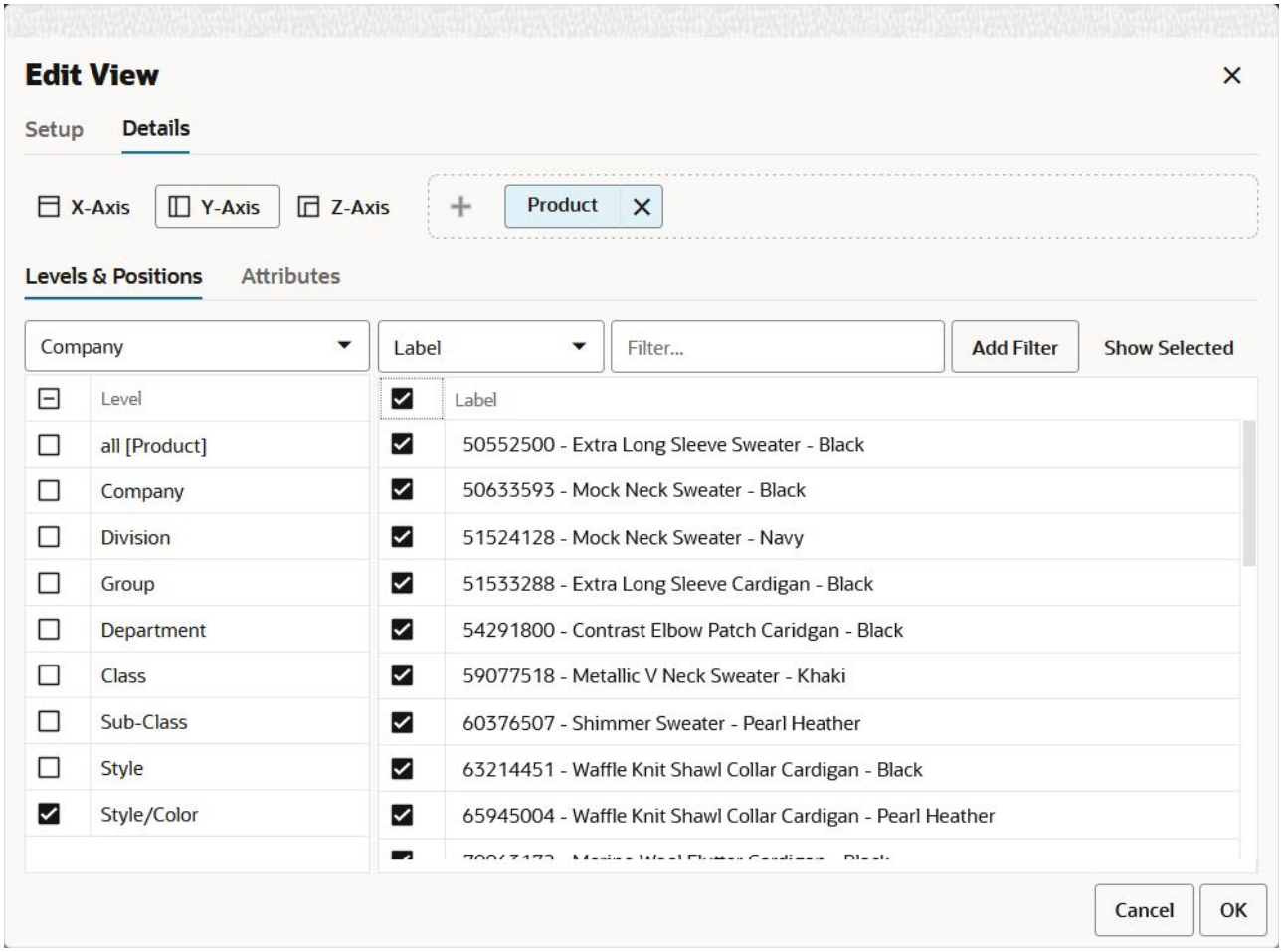
Figure 8-14 Branch Dimension Levels and Positions



Showing and Hiding Levels

To show or hide levels, complete the following steps:

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

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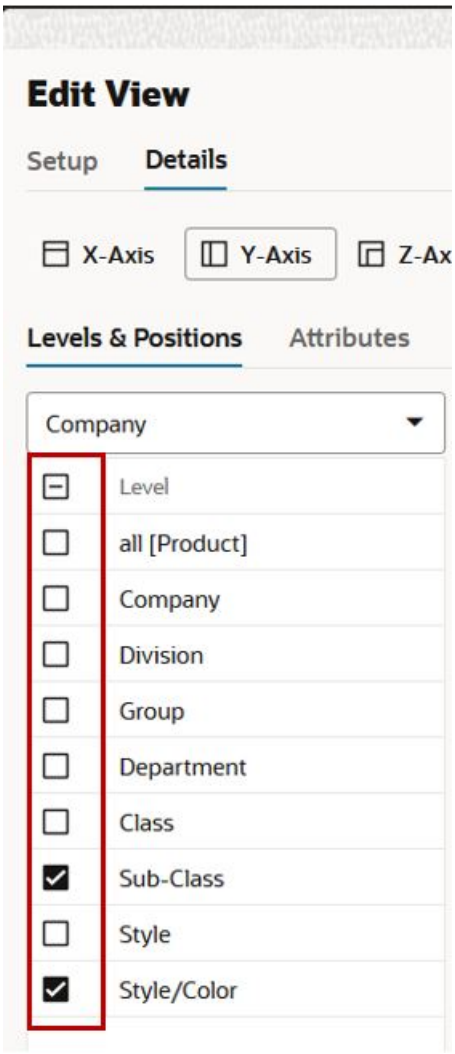
Figure 8-15 Show and Hide Levels



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

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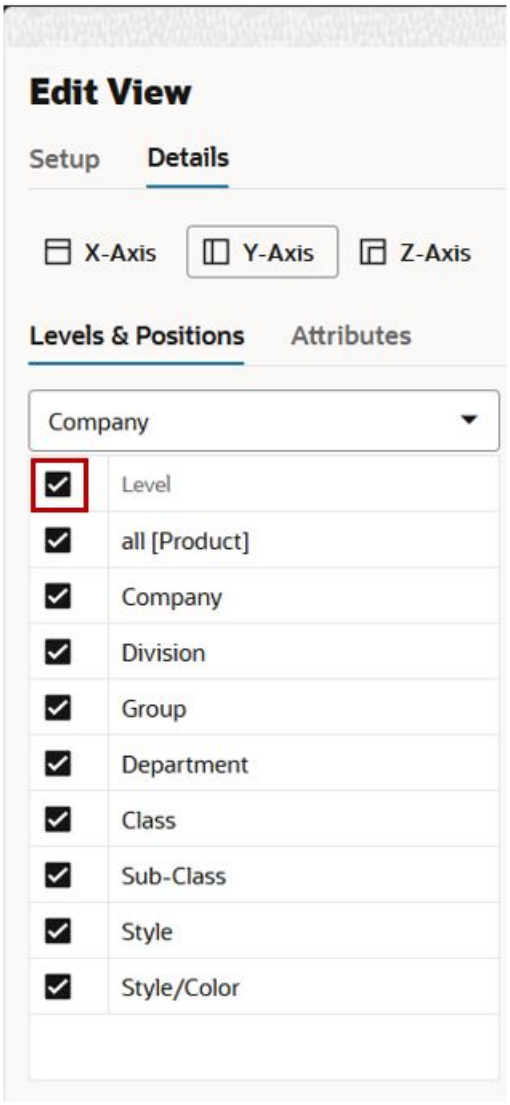
Figure 8-16 Selecting and Deselecting All Levels



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

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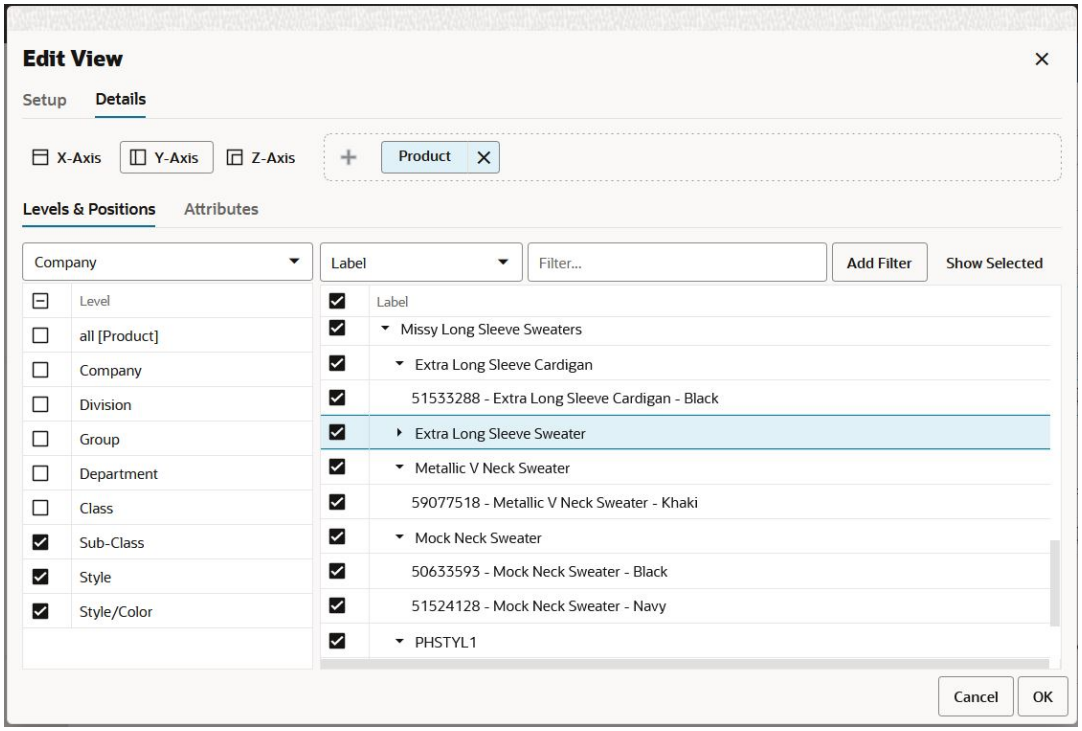
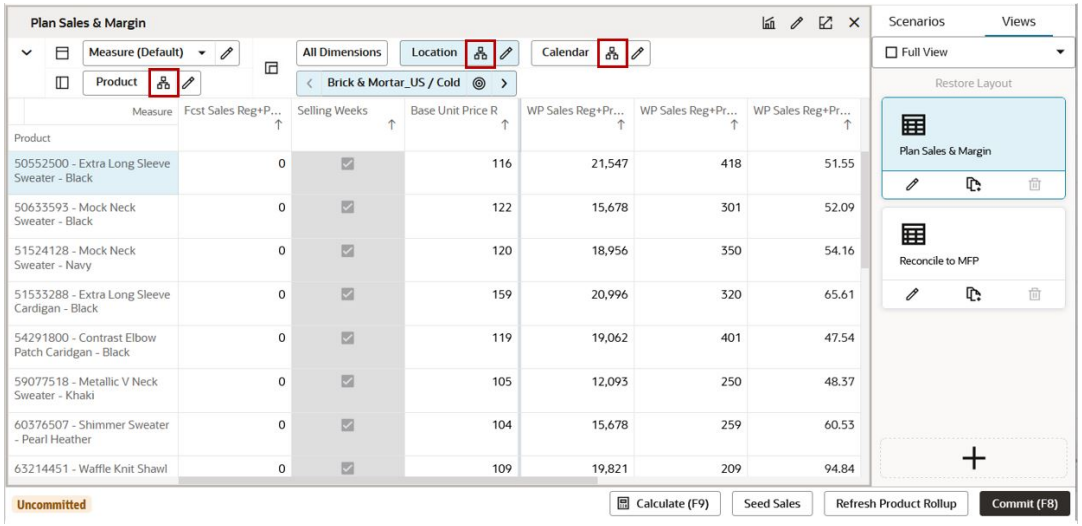
Figure 8-17 Expand and Collapse Levels



5. Alternatively, you can select branch hierarchy and levels without navigating to edit view. A hierarchy icon is available to access the list to change the branched hierarchy and level.

Figure 8-18 Branch Hierarchy and Level Selector Icon



To change the branch alternate hierarchy and level without navigating to the edit view, perform the following the steps:

a. Click Hierarchy available at the dimension tile.

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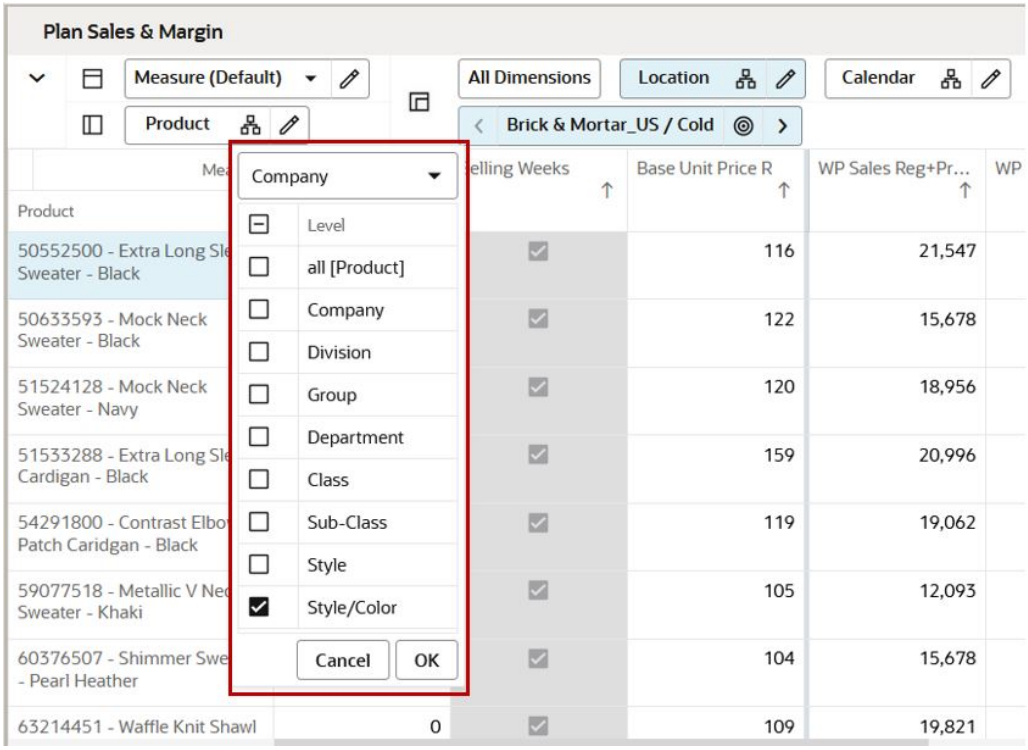
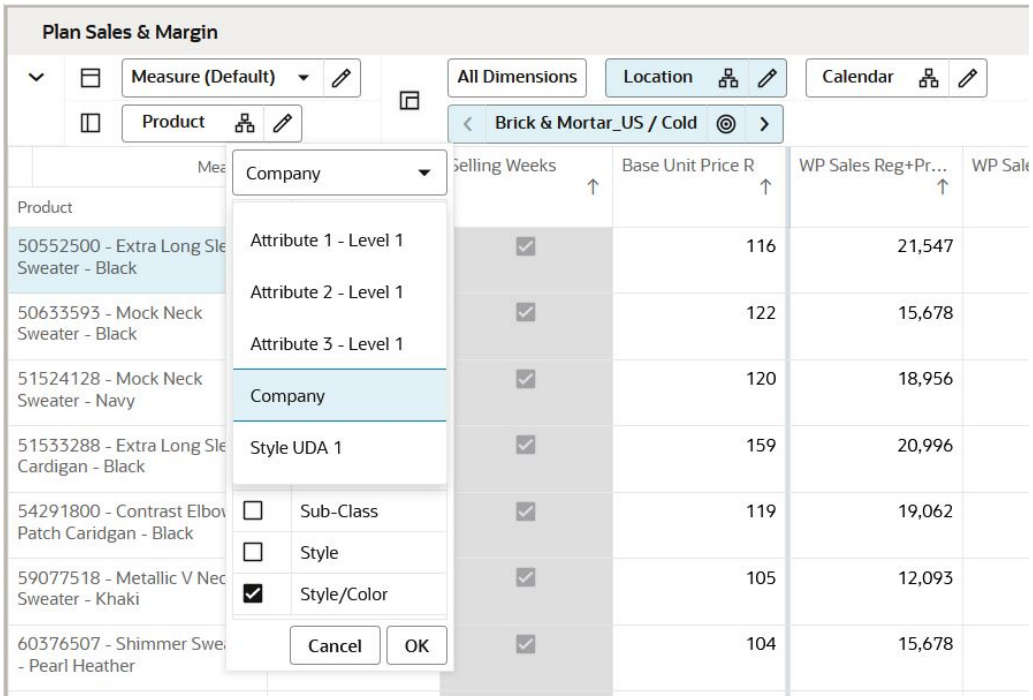
Figure 8-19 Click Hierarchy



b. From the branch hierarchy list, select the alternate hierarchy.

Figure 8-20 Branch Hierarchy List



c. Based on the selected Branch Hierarchy, you can see the dimension levels list to select from.

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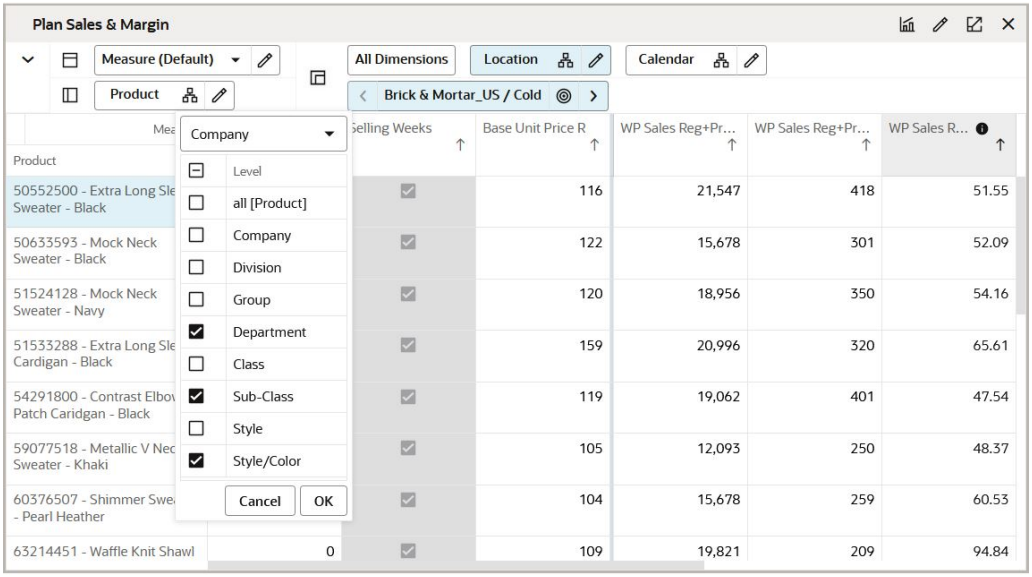
d. Select the levels by either selecingt the checkbox or level label.

Figure 8-21 Select 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 clear the boxes to the left of the positions to change the visible positions.

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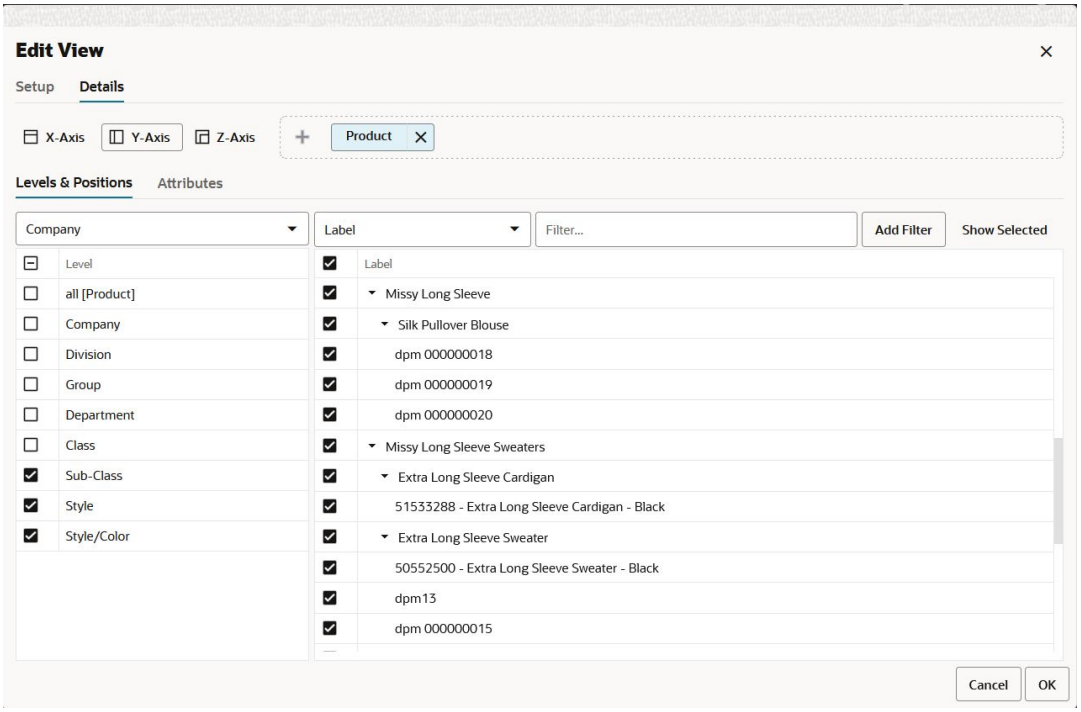
Figure 8-22 Change Visible Positions



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

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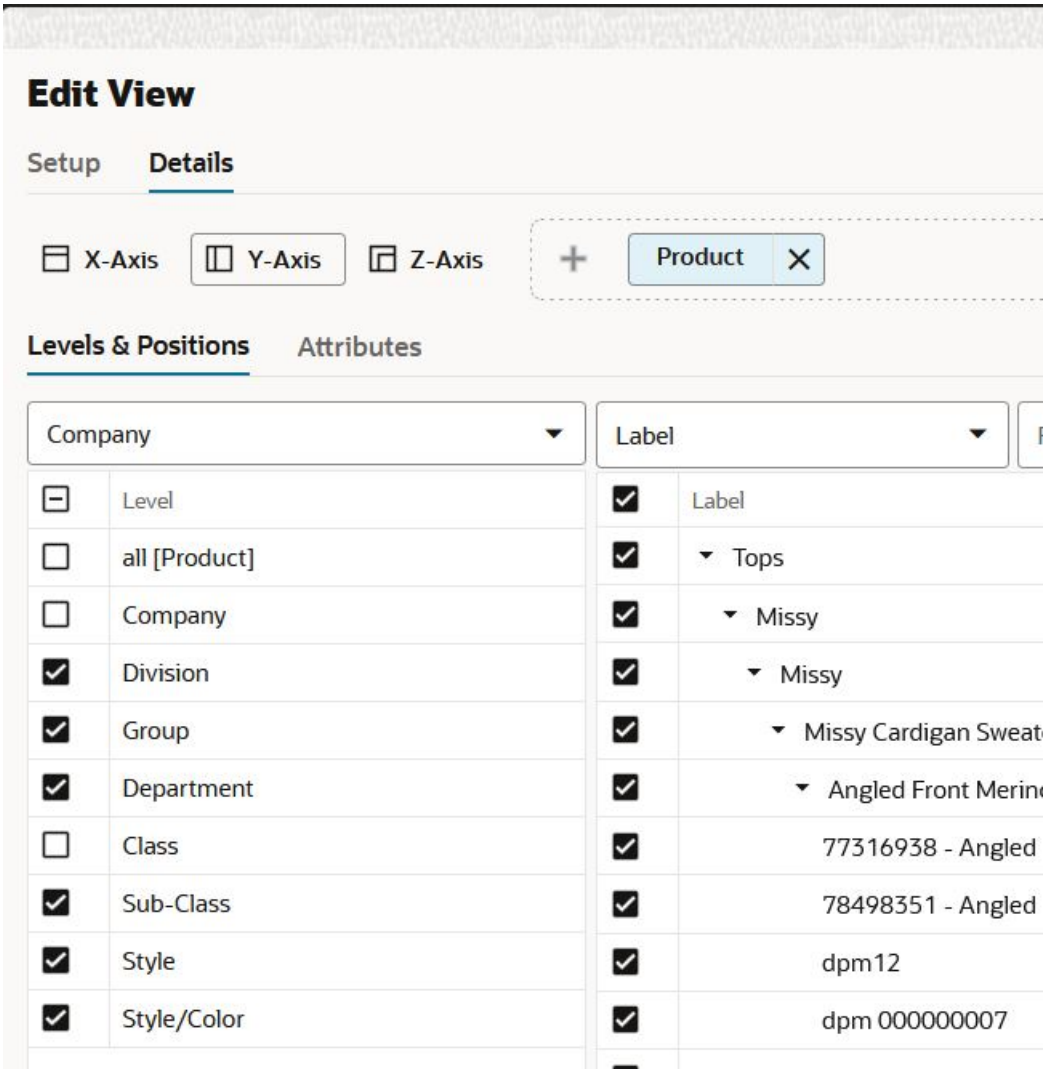
Figure 8-23 All Positions



Select and Deselect Positions in Edit View

You can also select and deselect positions using the context menu (right-click) option. This option is an alternative to select or deselect positions in Edit view. You can use context menu option to select or deselect multiple positions simultaneously.

To select a position, right-click on the position and choose **Select**. Similarly, to deselect a position, right-click on a selected position and choose **Deselect**.

When you want to select or deselect multiple positions, select multiple positions by Using a mouse drag with a **Shift** or **Ctrl** key and right-click to opt for **Select** or **Deselect** positions.

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Figure 8-24 Context Menu Select Position in Edit View

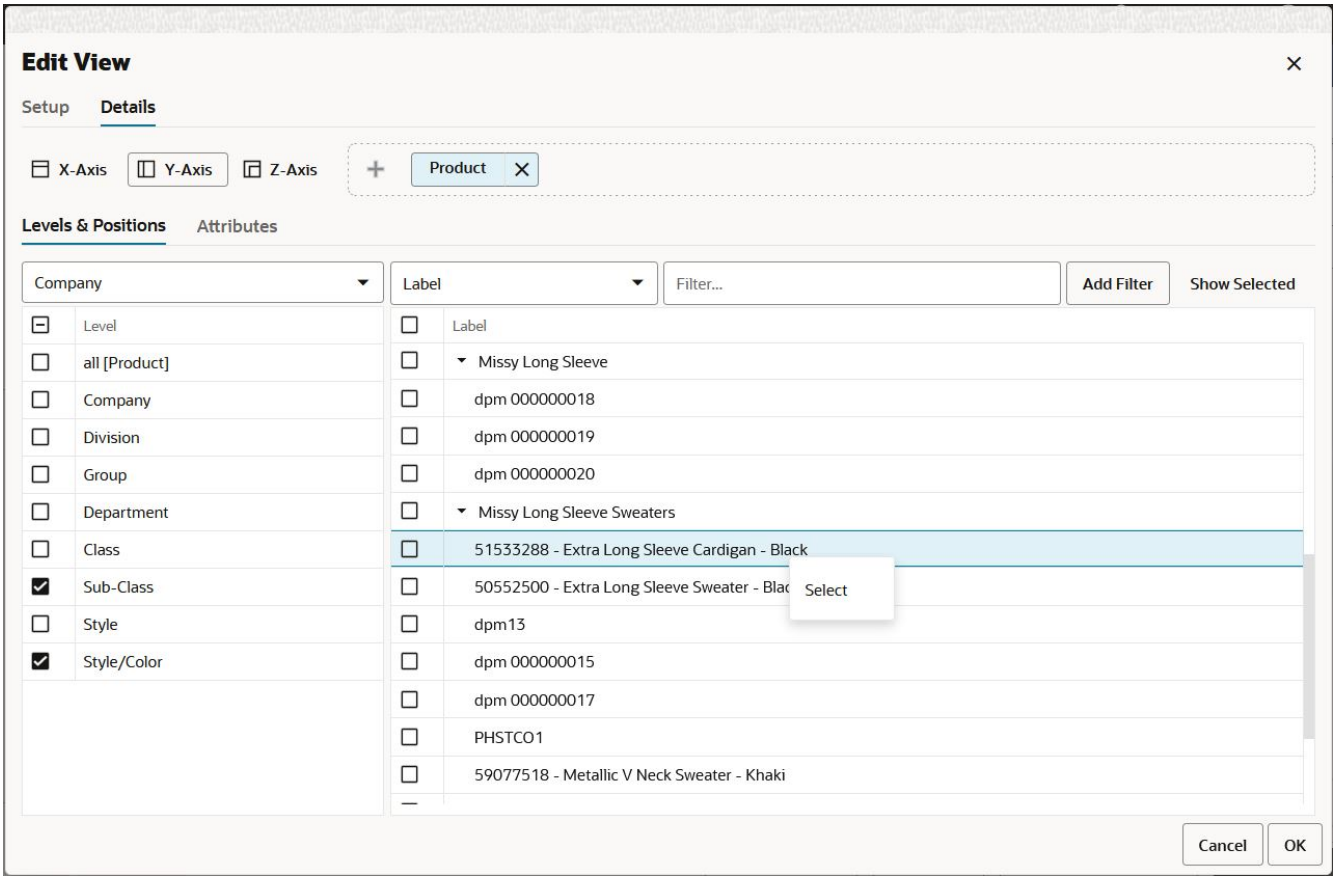

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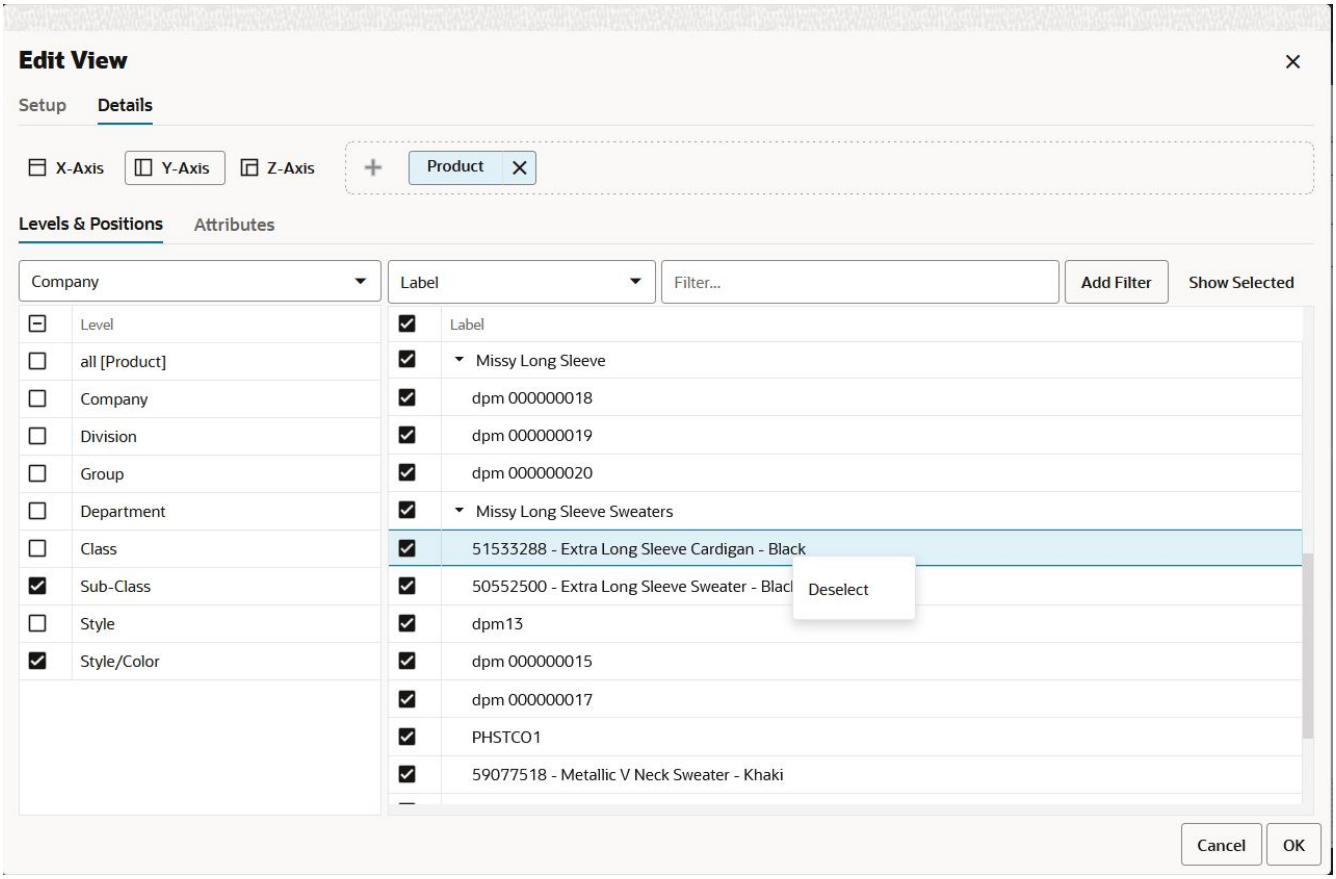
Figure 8-25 Context Menu Deselect Position in Edit View



Collapsing and Expanding Positions in Edit View

Collapse functionality allows a planner to group the child level positions to parent level. Expand functionality allows a planner to drill-down parent level to view all the child level positions. Collapse and expand function helps you to see all the positions in edit view that is meaningful to you.

To collapse or expand the dimension position you can use context menu (right-click) option. You can right-click on a parent level position, you can select expand function to see all the child positions. Similarly, to group the child level position, you can right-click on the parent position and select **Collapse**.

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Figure 8-26 Expand Position Level

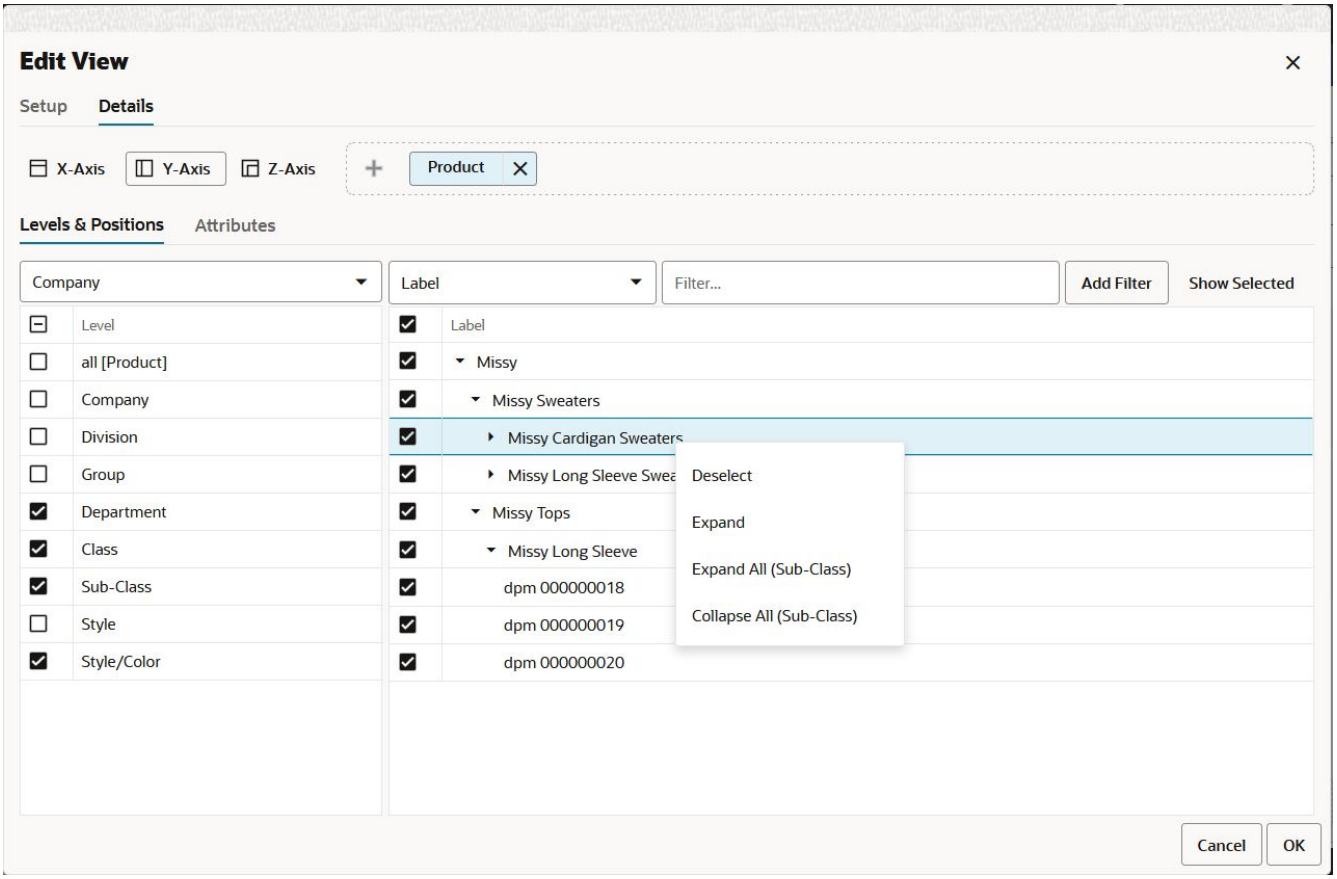

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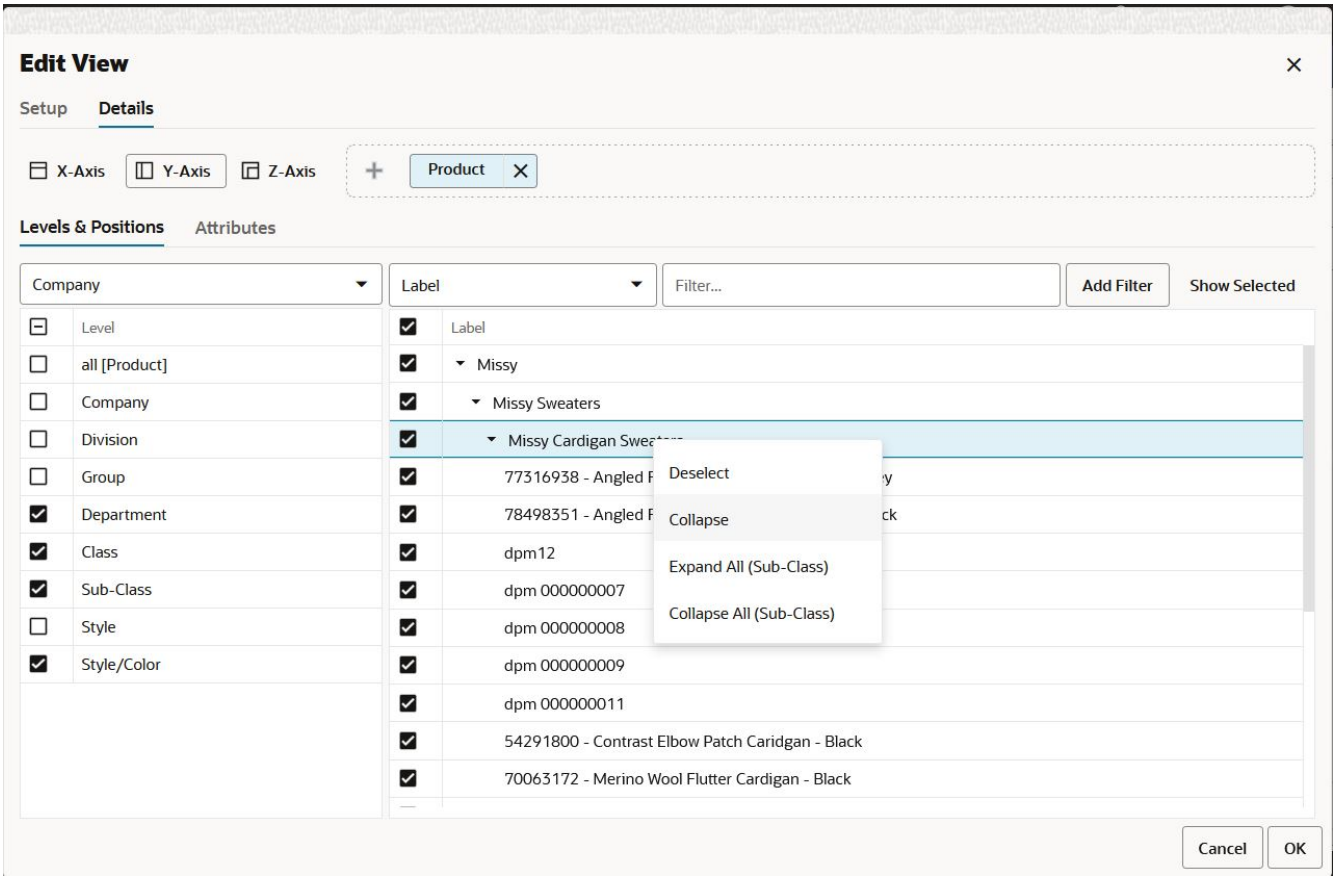
Figure 8-27 Collapse Position Level



Collapse All and Expand All in Edit View

The same functionality of collapse has been extended to Collapse All which collapses all the child level positions for the selected dimension level in Edit view. And Expand all function expands all the child level position for the selected dimension level in Edit view. The selected dimension level is specified next to Collapse All or Expand All in the context menu. With this function, you can quickly collapse or expand view the list of positions as desired.

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Figure 8-28 Edit View Collapse All

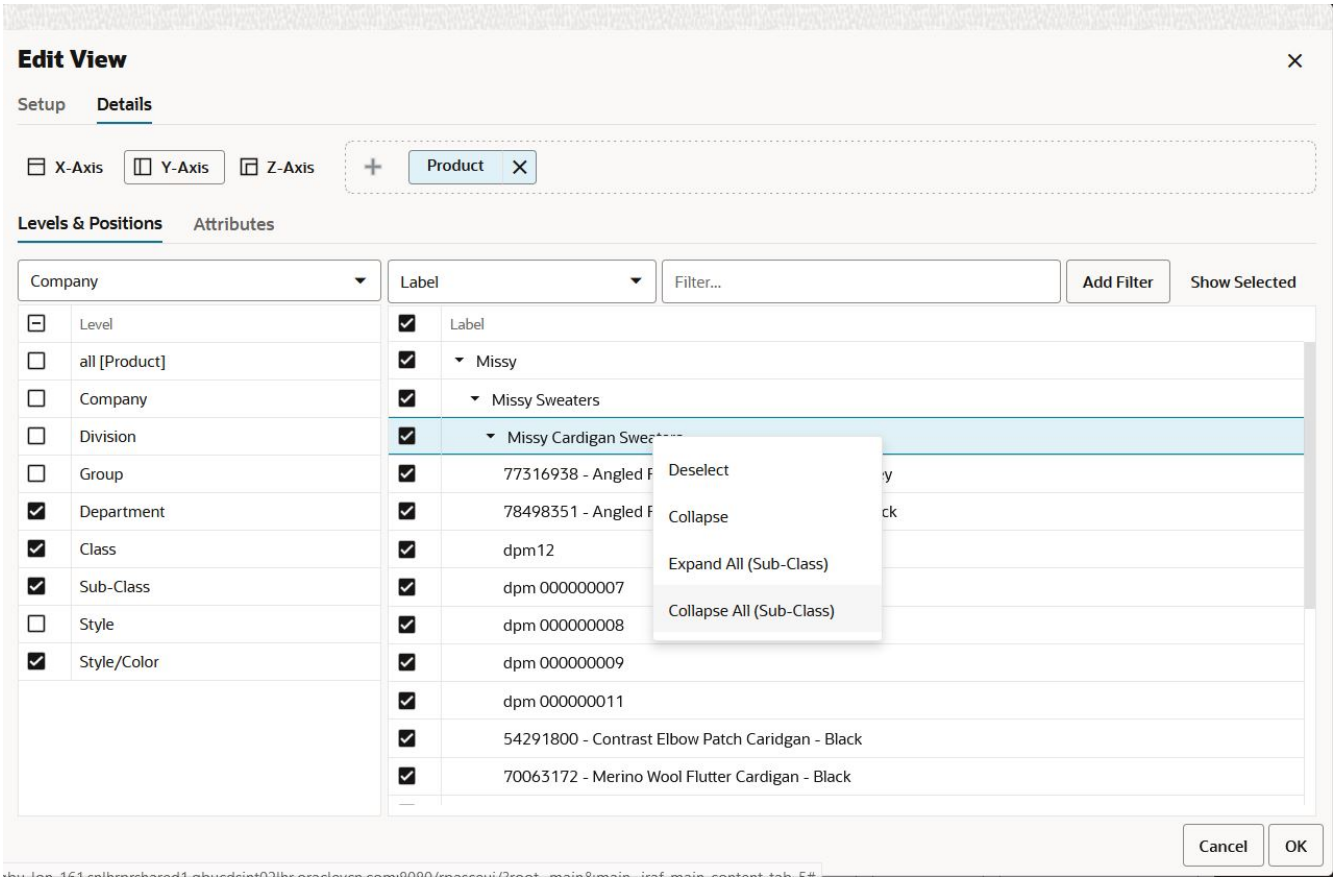

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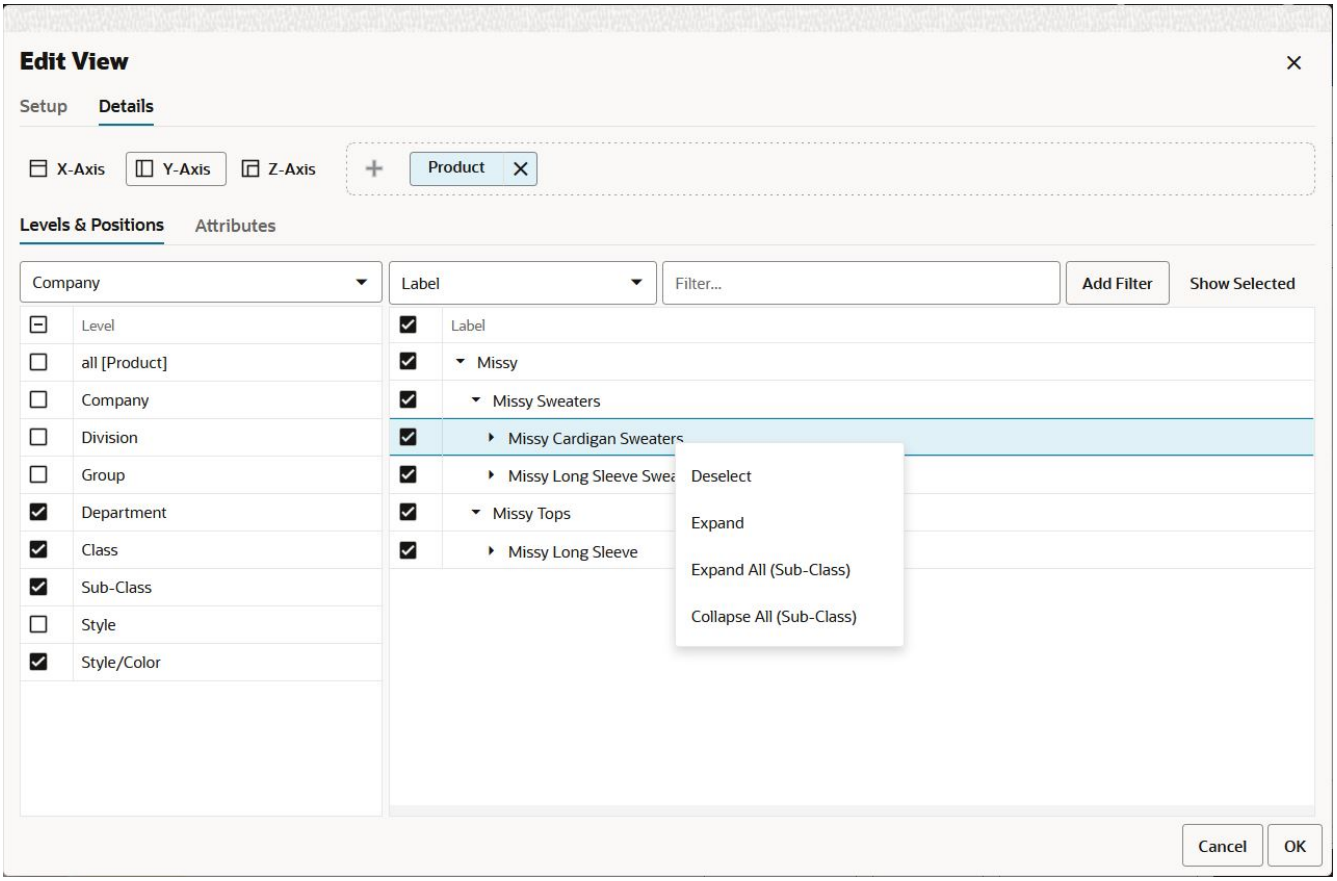
Figure 8-29 Edit View Expand All



> **Note**
>
> Expand or Collapse levels altered in the Edit View Overlay do not change the Expand or Collapse levels in the pivot table.

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, you can search positions with more than one attribute. The filter applied with the same attributes are applied with the logical operation *OR*. For example, if you search for positions with attribute colors of black and red, then the result displays all of the positions with the color red and the color black. The filter applied with different attributes are applied with the logical operation *AND*. For example, if you search for the position with the Brand X and the color Blue then the result positions are of the Brand X and the color Blue.

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Figure 8-30 Filter Positions (Edit View)

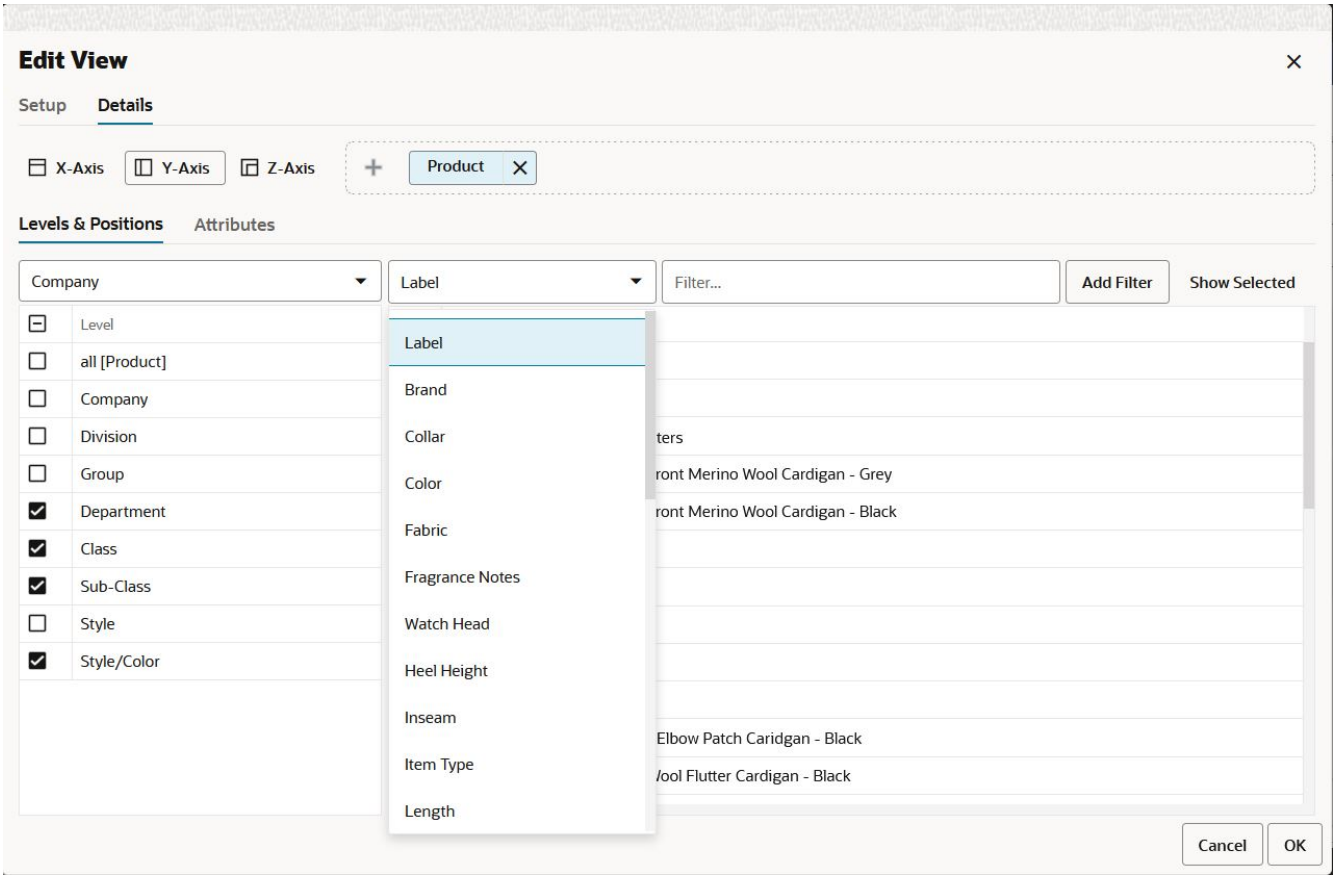

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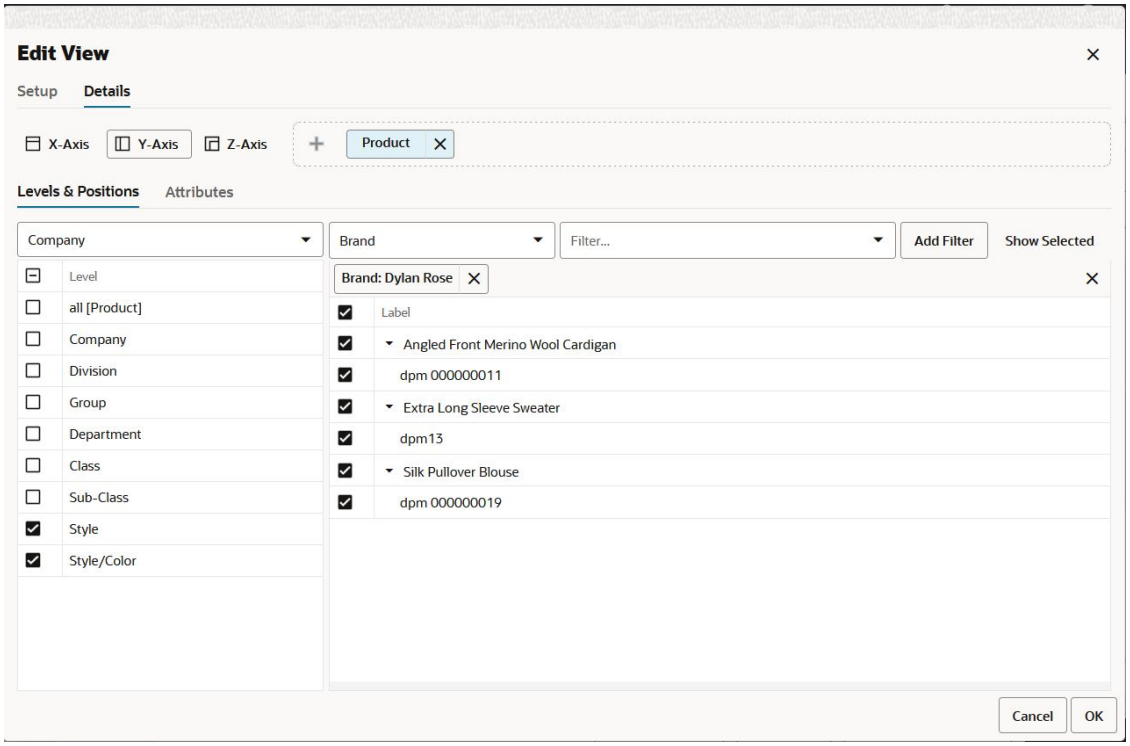
Figure 8-31 Filter Positions by Attribute Example



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 clear the boxes to the left of the attribute name positions to viewing and sort availability of particular attributes.

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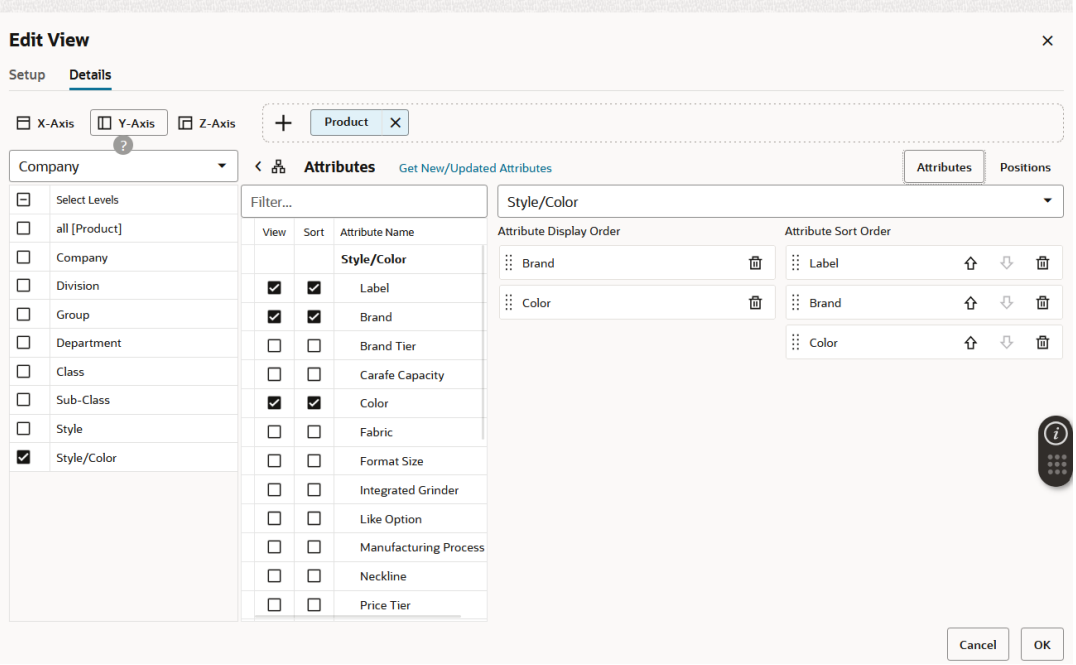
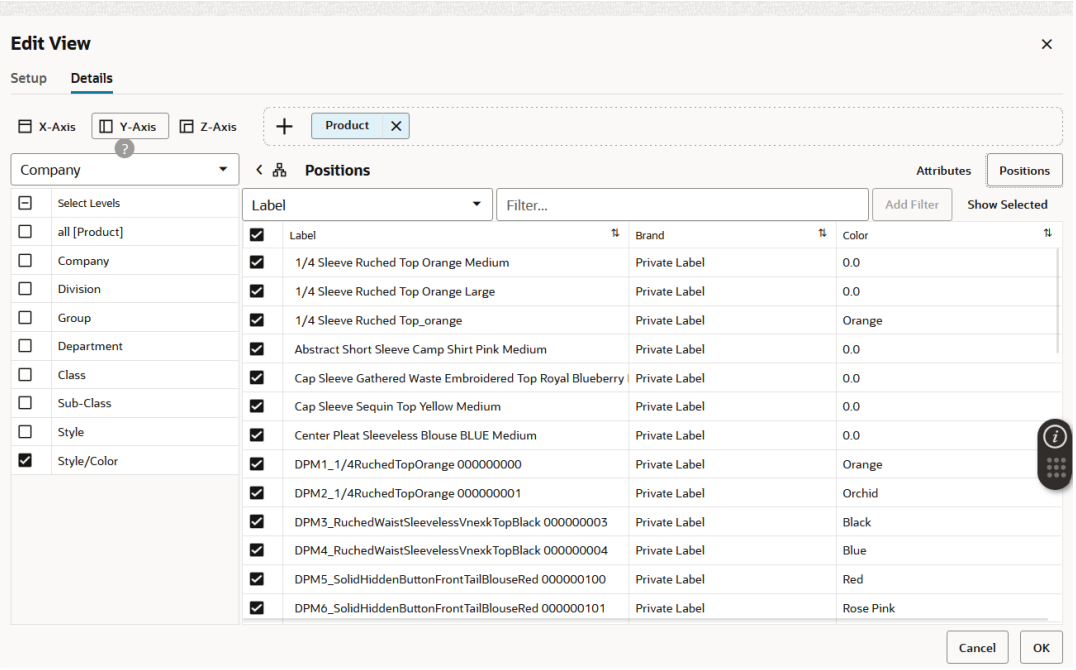
Figure 8-32 Select Attributes for Viewing and Sorting Positions



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.

   When you select attributes to display, you can see the attributes on the Level & Positions tab listed next to the position labels as shown in Figure 8-33. You can sort the position labels on the Position Tab by sorting the attributes. Use the sort icon available on the Attributes column to sort the positions.

Figure 8-33 Attributes Displayed on the Levels & Position Tab



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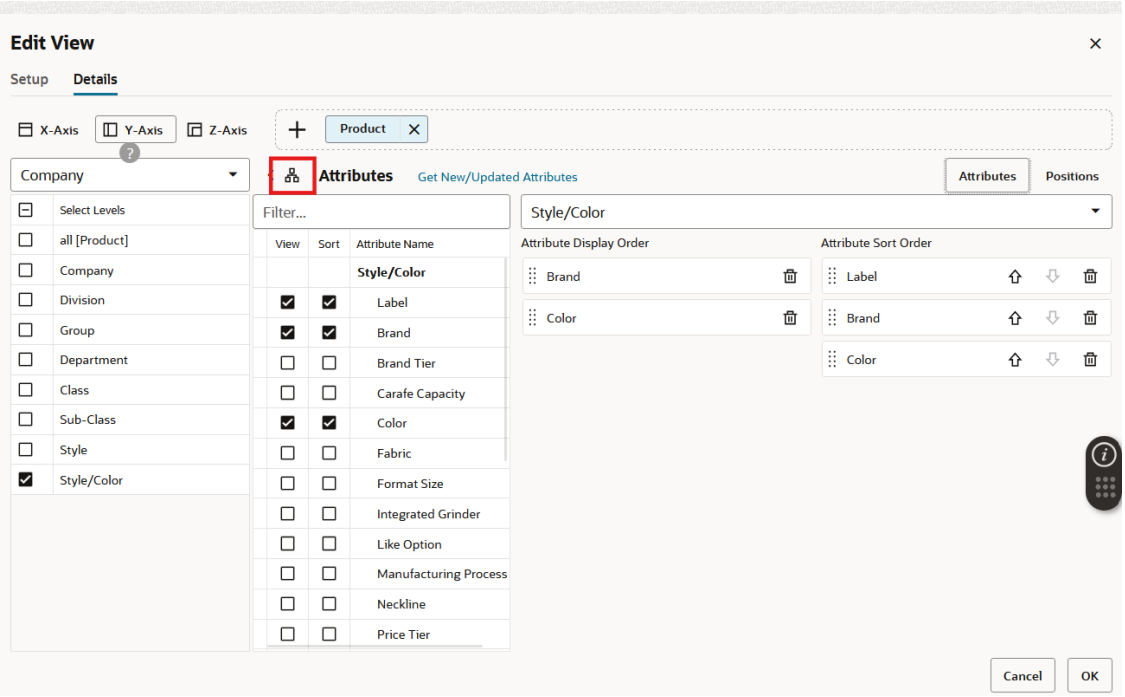
> **Note**
>
> The applied sorting for attributes on the Level & Position tab is not reflected in the Pivot table view. To sort the positions on Pivot table use the Attributes Sort Order on the **Attributes** tab.

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 **Delete**.

   Refer to Figure 8-32, Select Attributes for Viewing and Sorting Positions.

As shown in, Figure 8-34, use **Collapse** to hide the position level selection side panel. By collapsing the side panel, the **Edit** view is expanded and has a larger viewable window.

Figure 8-34 Collapse Position Level



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> **Note**
>
> These two types of sorting types are available to rearrange the order of positions in workspace:
>
> - **Natural Sorting** - Y2 is sorted before Y11 since 2 is less than 11 in numerical order.
> - **Alphabetical Sorting** - Y11 is sorted before Y2 since the 1 character in the first string precedes 2 in alphabetical order.
>
> An administrator can select one of the sorting type using the self-service option. The Natural sorting order is set by default in RPASCE.
>
> For more details, refer to the *Oracle Retail Predictive Application Server Administration Guide*.

Viewing New or Updated Attributes

At times, new attribute information enters the system through data load or integration with other Oracle Retail Cloud Services. When this happens, workspaces created prior to the new data will contain the old values. 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. Therefore, you will want to update the attribute information in your workspaces to the new values when they are available. When opening an existing workspace, you will receive a Snackbar notification when new attribute information is available for use in a domain. 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 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 the Edit View.

Figure 8-35 New or Updated Attribute Notification

The Refresh Attributes action is used when attributes change in the Planning Data Store. However, in some cases, attribute values can change within a workspace itself. This happens most often when executing a calculation or custom action that recalculates attribute values based upon your edits. When this happens, the attribute values displayed in the workbook and used in operations like filtering will update automatically without the need to run the Refresh Attributes action.

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

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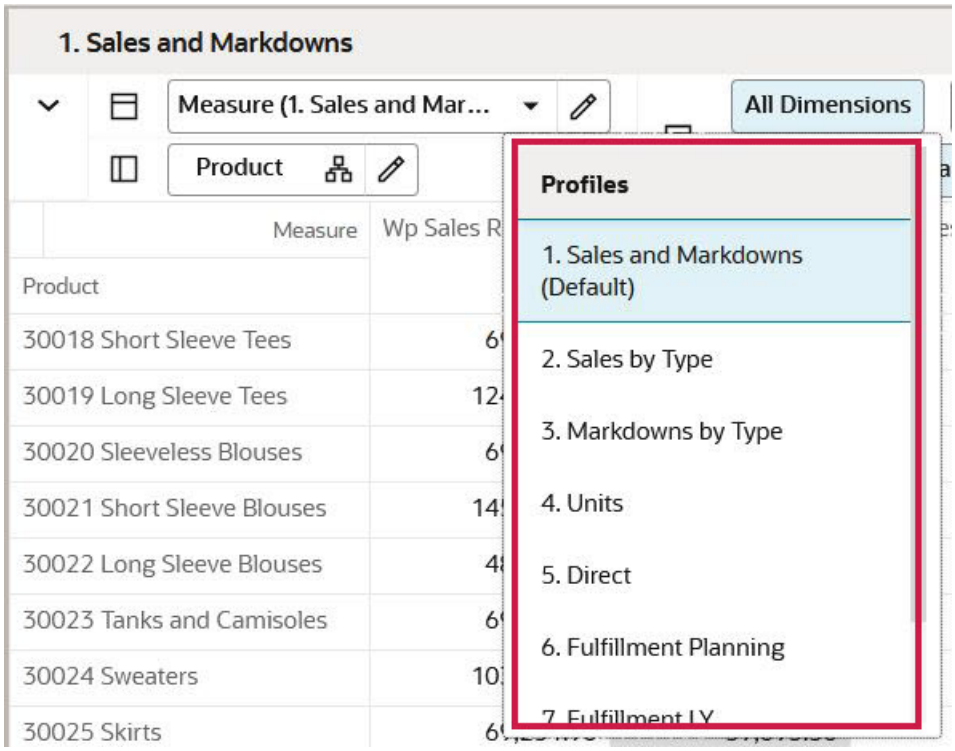
formatting, you can make your measure profiles available to other users. For more information, see Formatting.

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 8-36 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.

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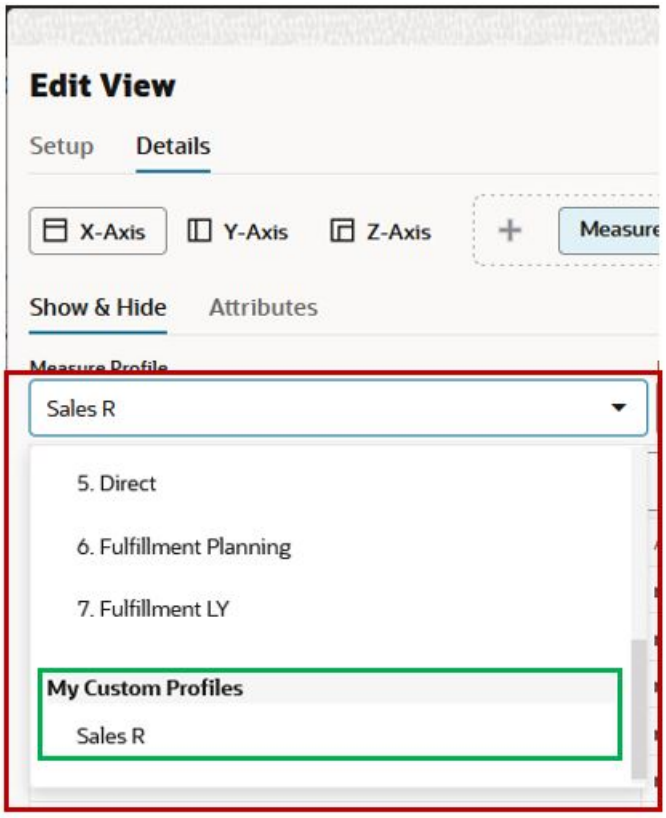
Figure 8-37 User-Defined Measure Profile

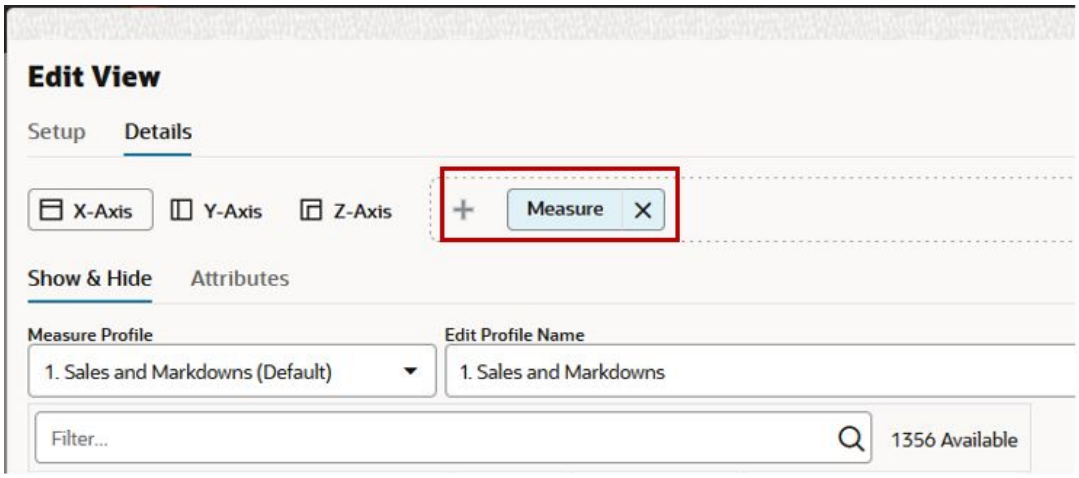


Creating Measure Profiles

To create a measure profile, complete the following steps:

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

Figure 8-38 Measure Edit View



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

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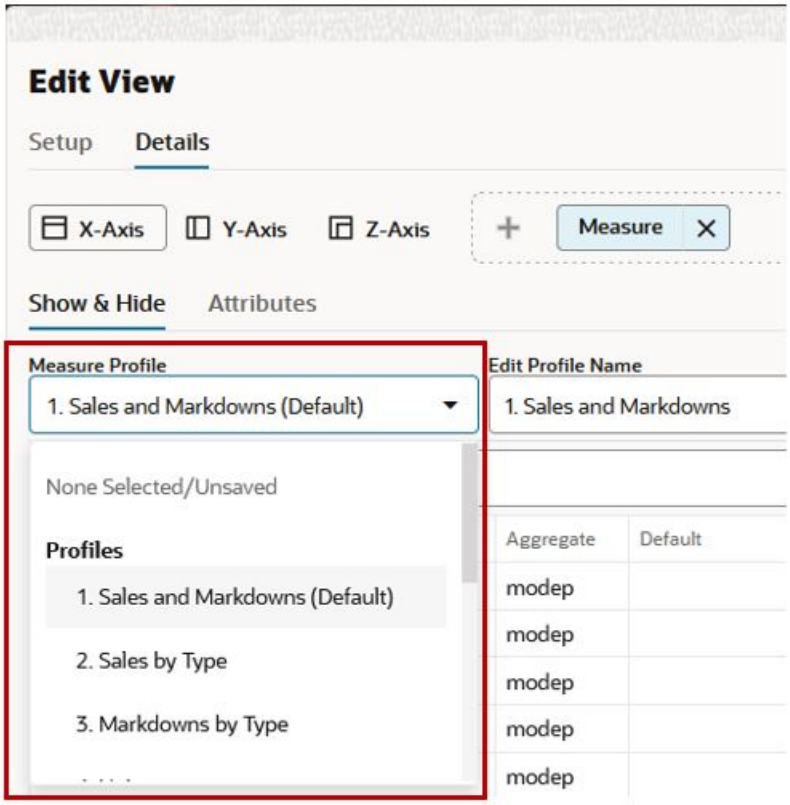
Figure 8-39 Select Measure Profile



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.

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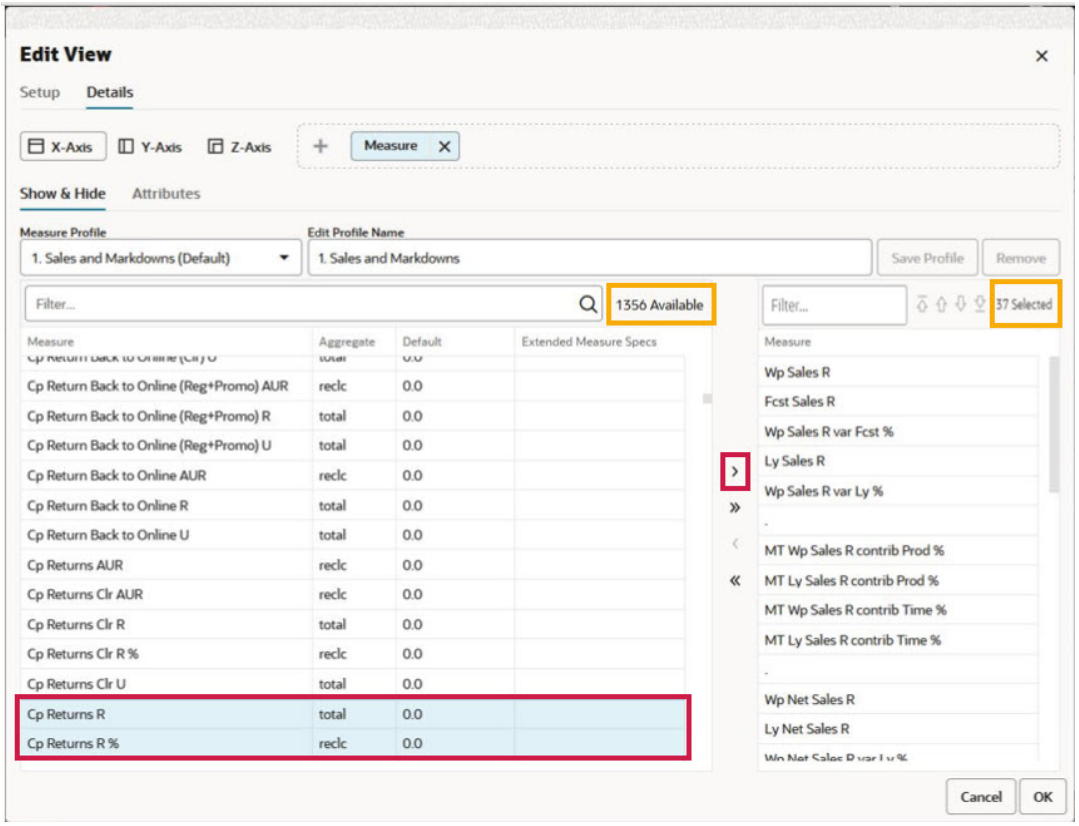
Figure 8-40 Select Measures to Add



4. The total count of the available measures and selected measures is displayed. See Figure 8-40. 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…** search box, then the available list of measures is filtered to display measures containing the word *Sales*. Click **X** to clear the text in the Filter text box.

   Similarly, you can search the measure in selected measure list (right side). When you filter or search measure in selected measure list, the action button for moving measure up / down is unavailable.

   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.

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Figure 8-41 Filter Available Measures

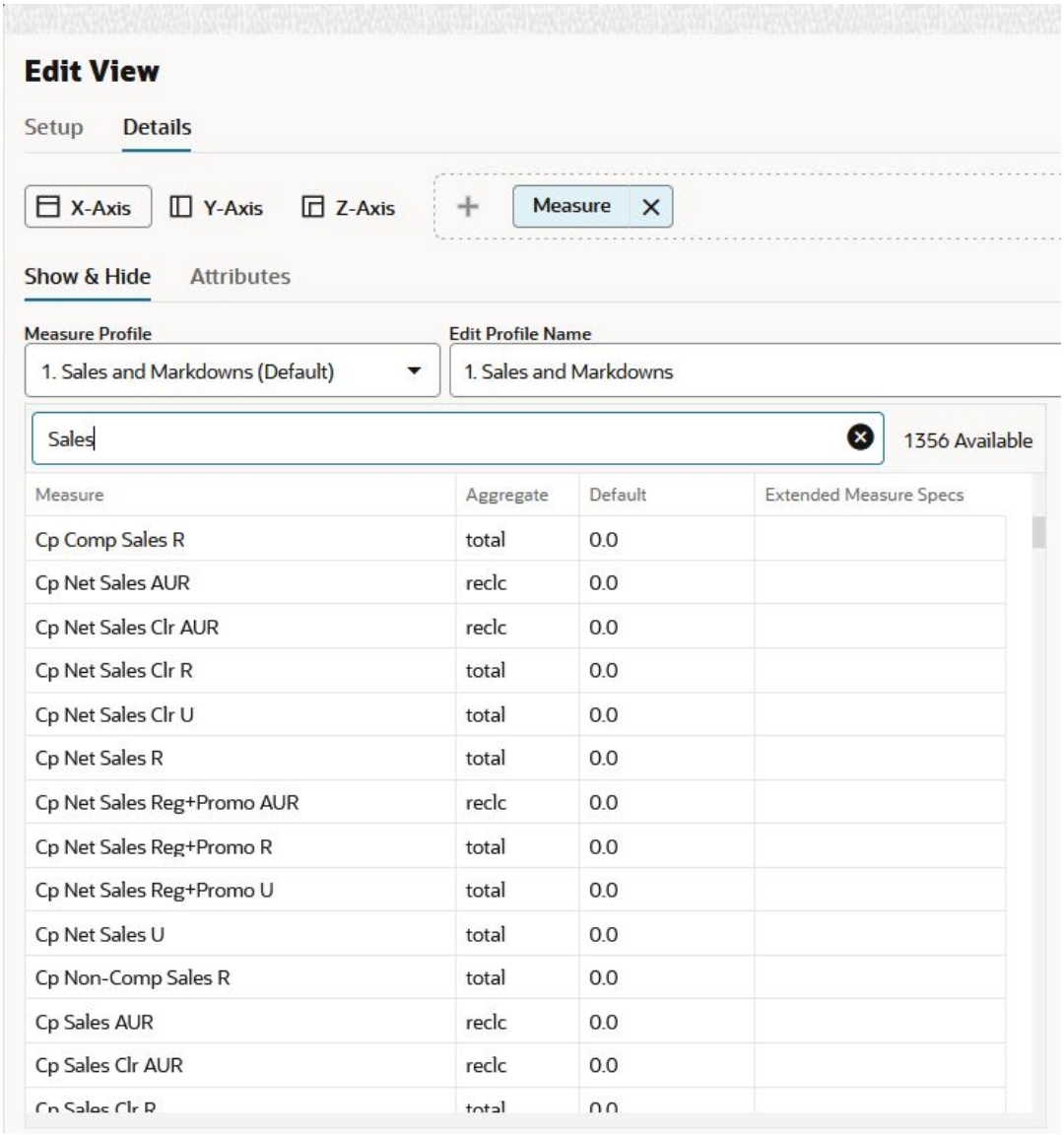

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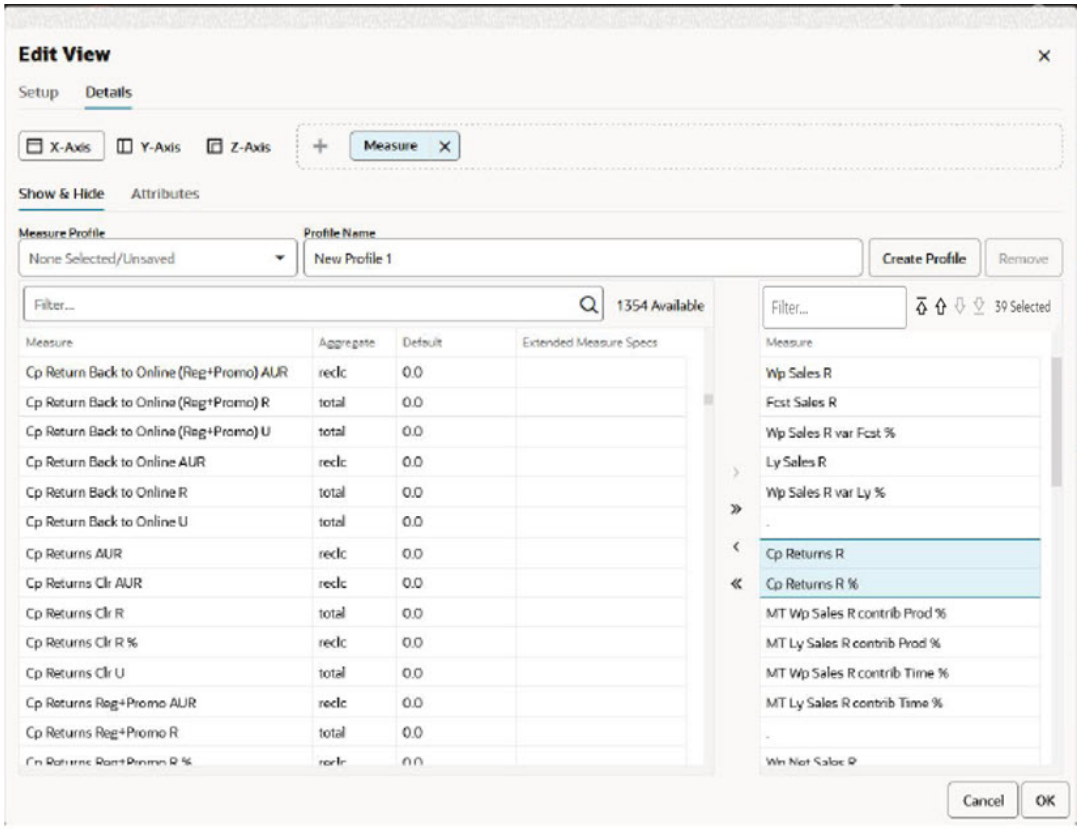
Figure 8-42 Selected Measures Added to Selected Measures List



6. If you make changes to the selected list of application-defined measure profiles, the measure profile name will temporarily display *New Profile 1* until you create a new profile. In addition, the measure tile indicates that the current measure profile is unsaved.
7. Type a profile name in the Edit Profile Name text box and click **Create Profile**. A custom measure profile is available from the Measure Profile drop-down list. If desired, you may save this custom measure profile as a format.

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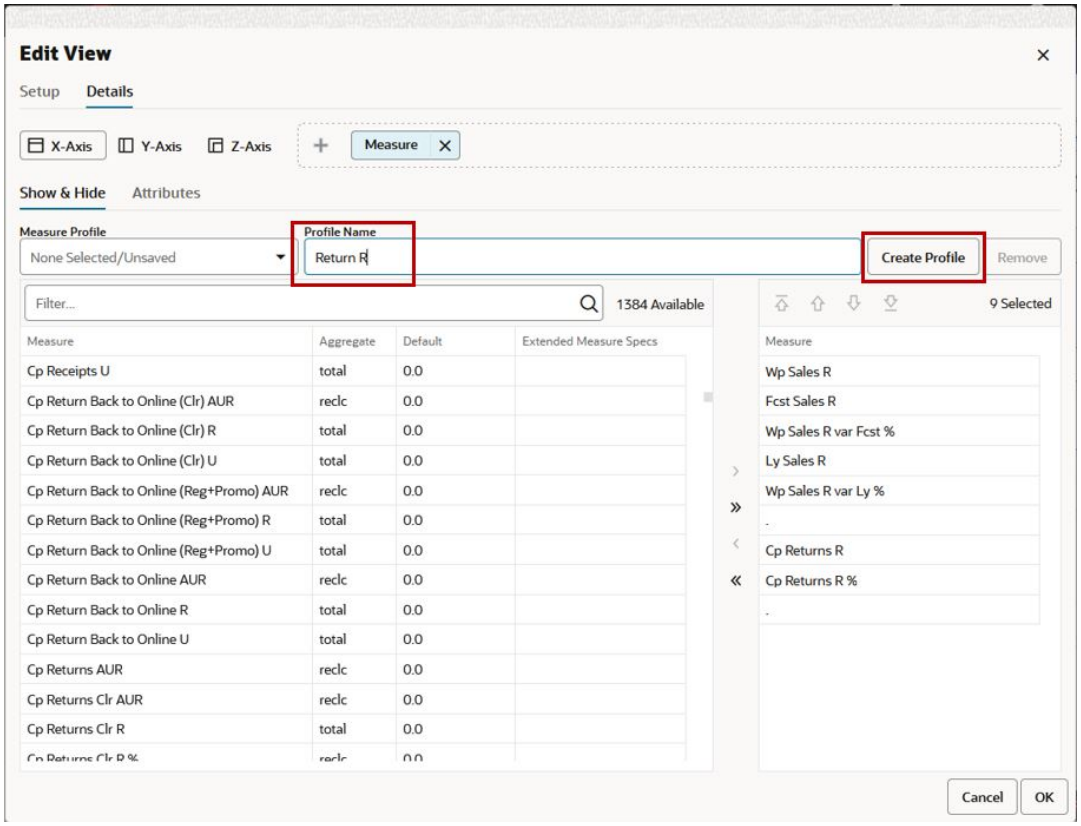
Figure 8-43 Create Profile



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.

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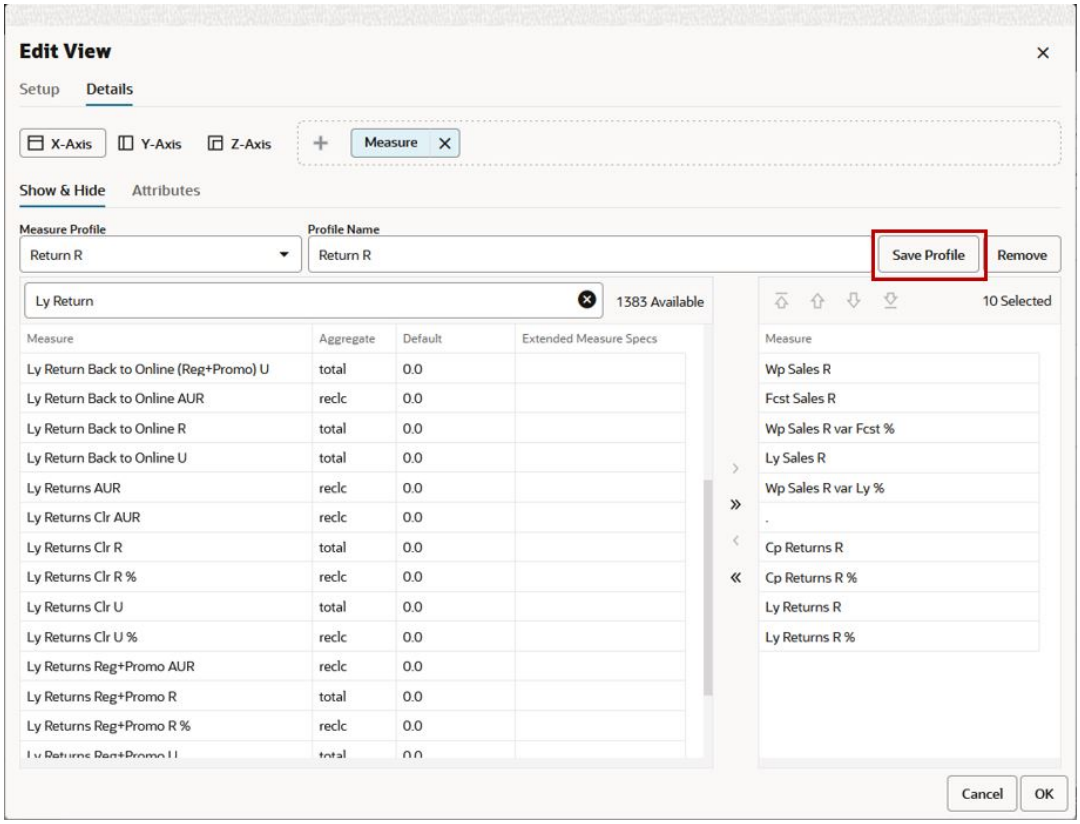
Figure 8-44 Save Profile



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.

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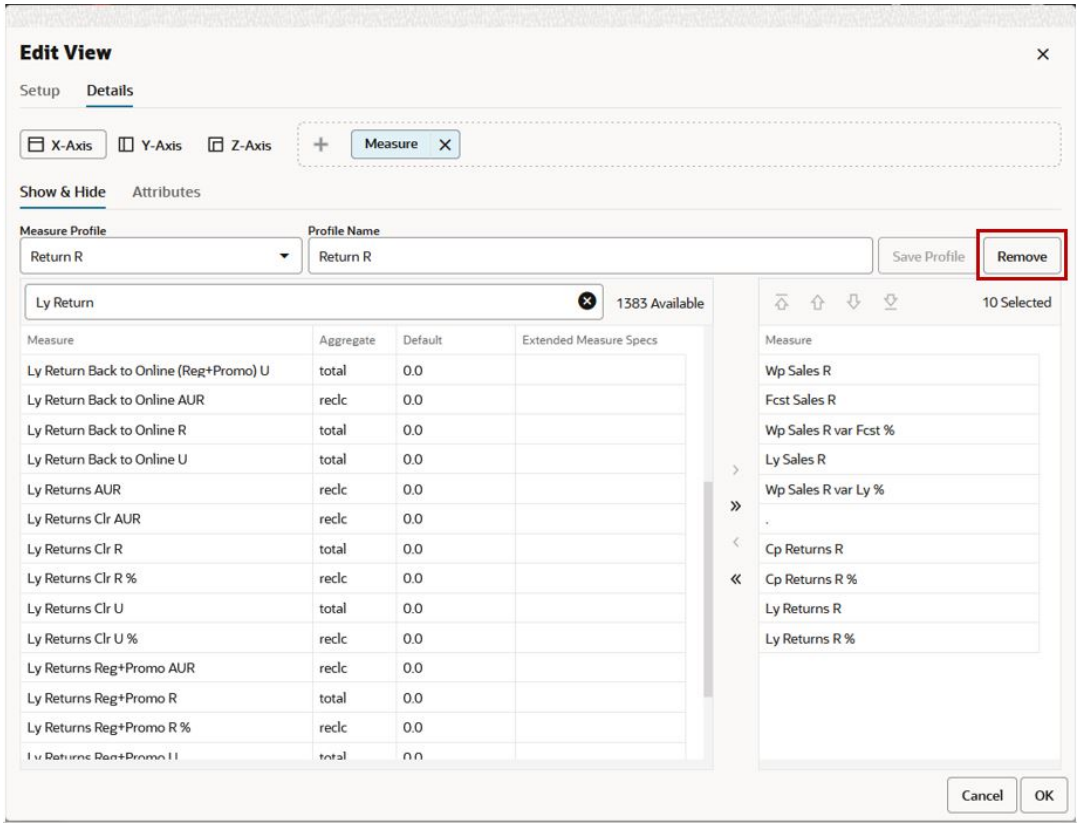
Figure 8-45 Remove Profile

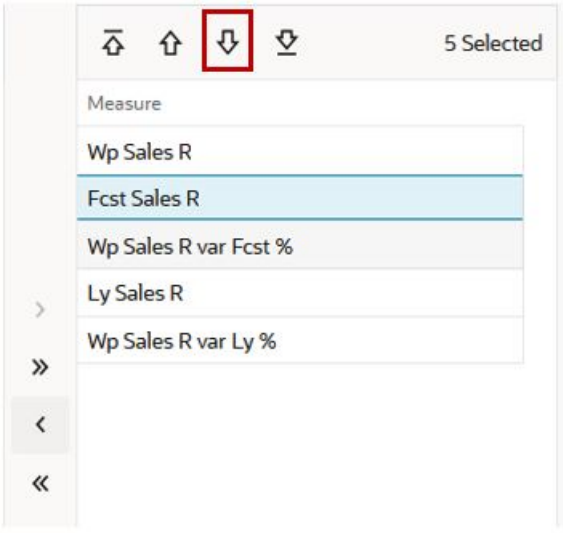


Reordering Measures

You can reorder the measures using the Measure Edit View window.

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

Figure 8-46 Re-Order Measures Using Arrows



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- **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. Click **Move Down** to move the measure underneath 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 8-47 and Figure 8-48, 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 8-47 Re-Order Measures: Cut Selected Measure

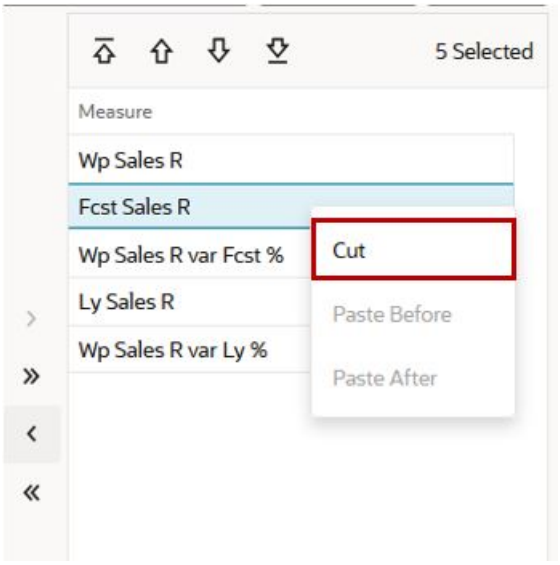

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Figure 8-48 Re-Order Measure: Paste Selected Measure

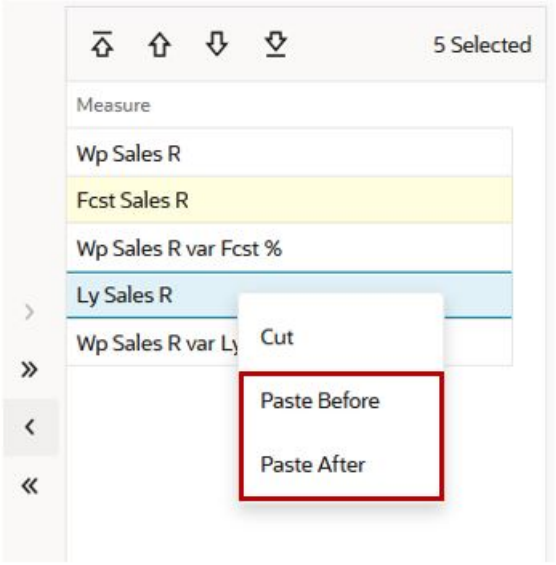
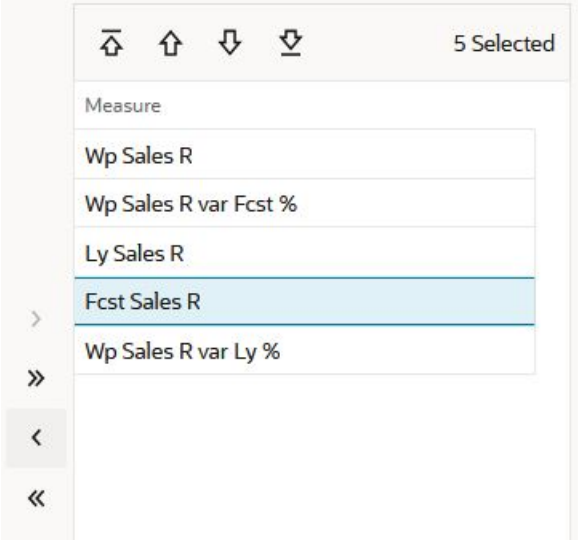


Figure 8-49 Re-Order Measure: Results of Paste



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9 Views

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

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

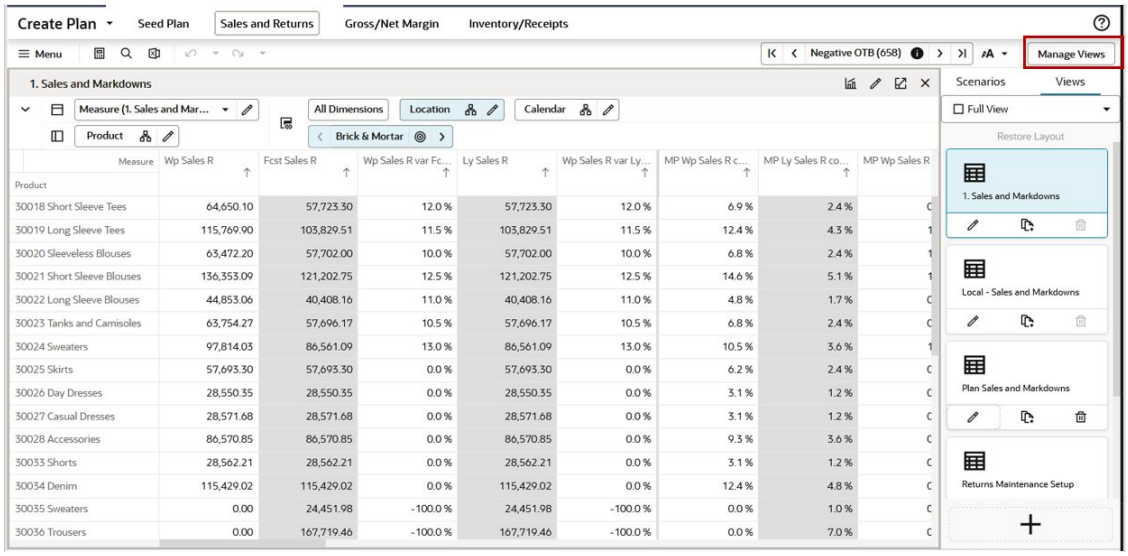
You can also choose to present the information in many types of charts using the charting functionality.

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.

> **Note**
>
> By default, the View Management Drawer is not displayed. Click **Manage Views** to open the View Management Drawer.

Figure 9-1 Manage Views



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Layouts

You can display your views in one of the following layouts:

- Full View
- Four-Tile View Layout

  Figure 9-2
- Two Vertical View Layout

  Figure 9-3
- (7:3) Vertical Layout (70:30)

  Figure 9-4
- (3:7) Vertical Layout (30:70)

  Figure 9-5
- Two Horizontal View Layout

  Figure 9-6
- 1 x 2 Vertical Layout

  Figure 9-7
- 2 x 1 Vertical Layout

  Figure 9-8
- 1 x 2 Horizontal Layout

  Figure 9-9
- 1 x 2 Horizontal (7:3) Layout

  Figure 9-10
- 1 x 2 Horizontal (3:7) Layout

  Figure 9-11
- 2 x 1 Horizontal Layout

  Figure 9-12
- 2 x 1 Horizontal (7:3) Layout

  Figure 9-13
- 2 x 1 Horizontal (3:7) Layout

  Figure 9-14

Click the View Layout list to control the layout.

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Figure 9-2 Four-Tile View Layout

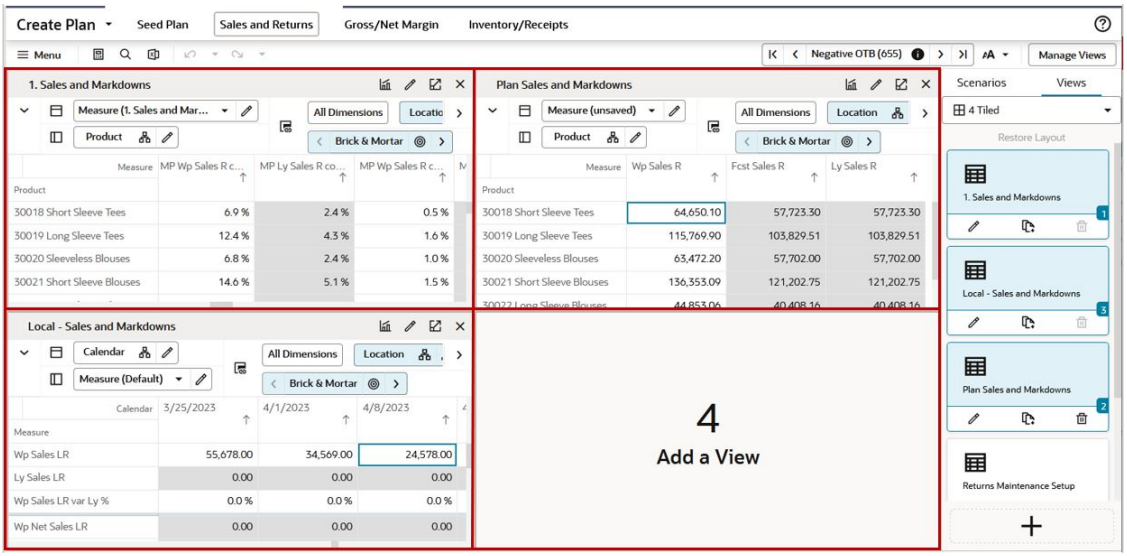

Figure 9-3 Two Vertical View Layout

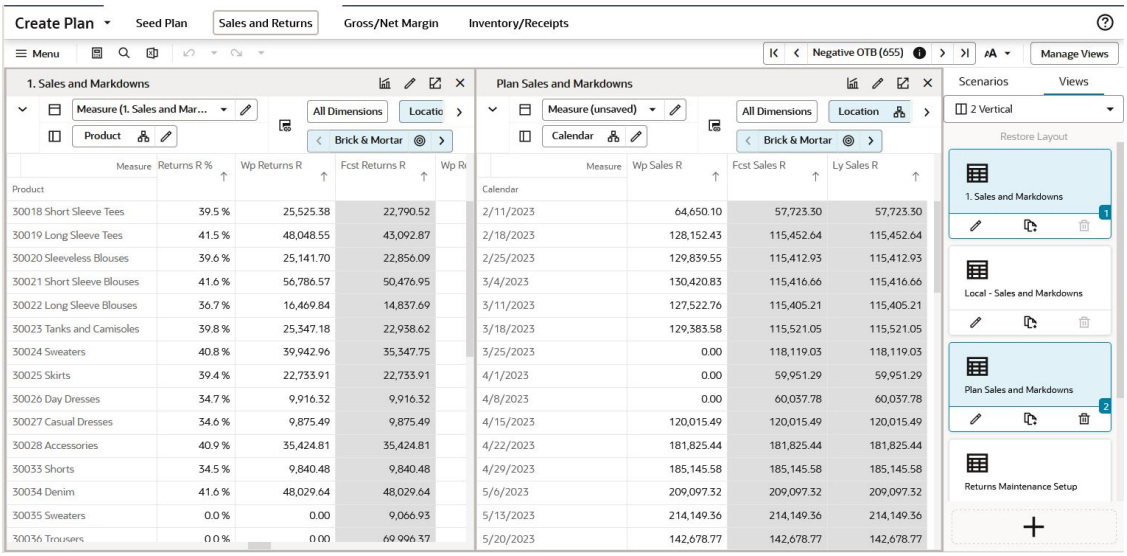

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Figure 9-4 (7:3) Vertical Layout (70:30)

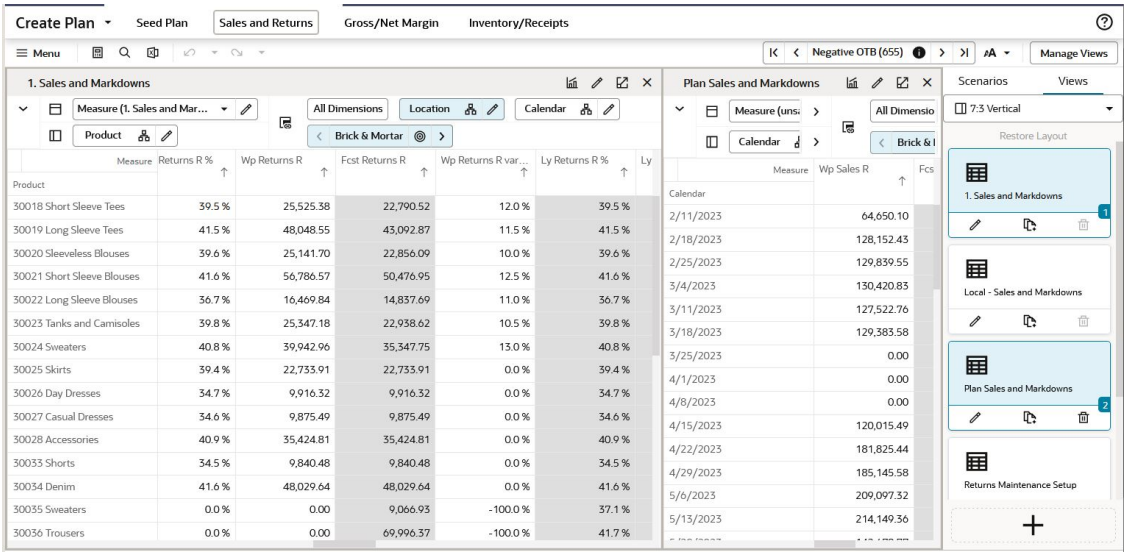

Figure 9-5 (3:7) Vertical Layout (30:70)

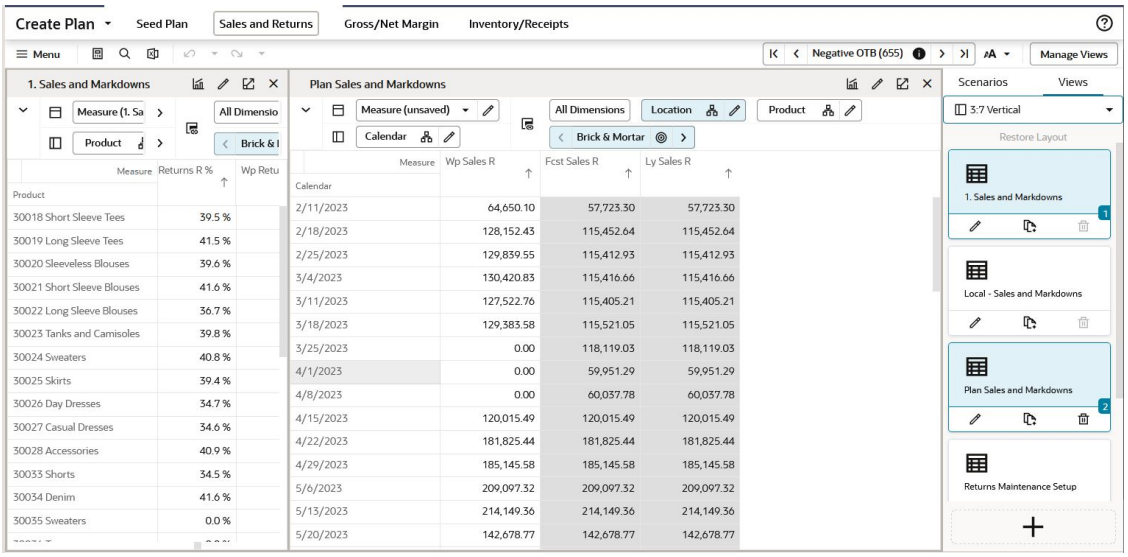

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Figure 9-6 Two Horizontal View Layout

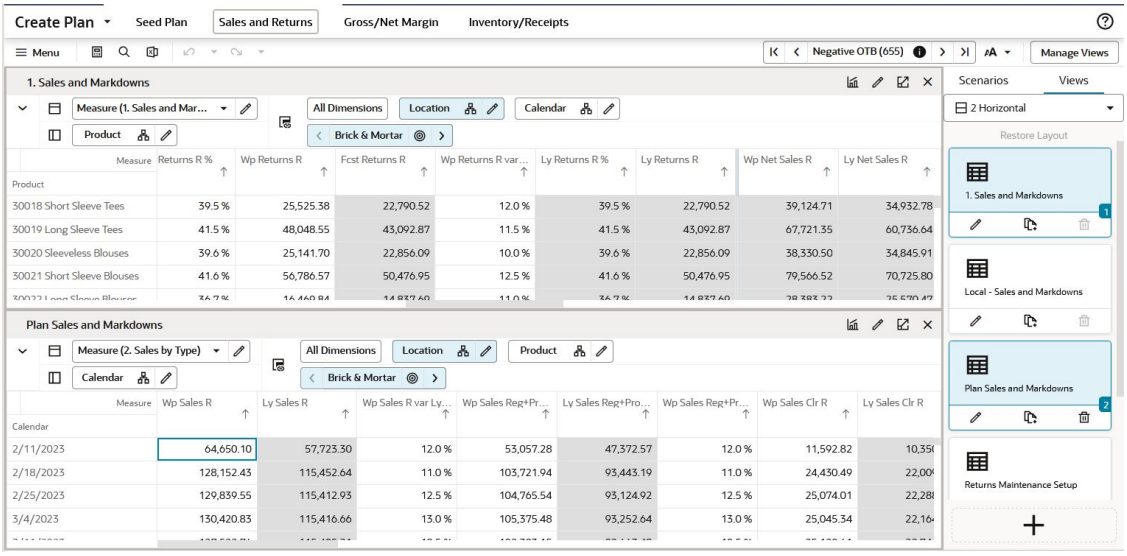

Figure 9-7 1 x 2 Vertical Layout

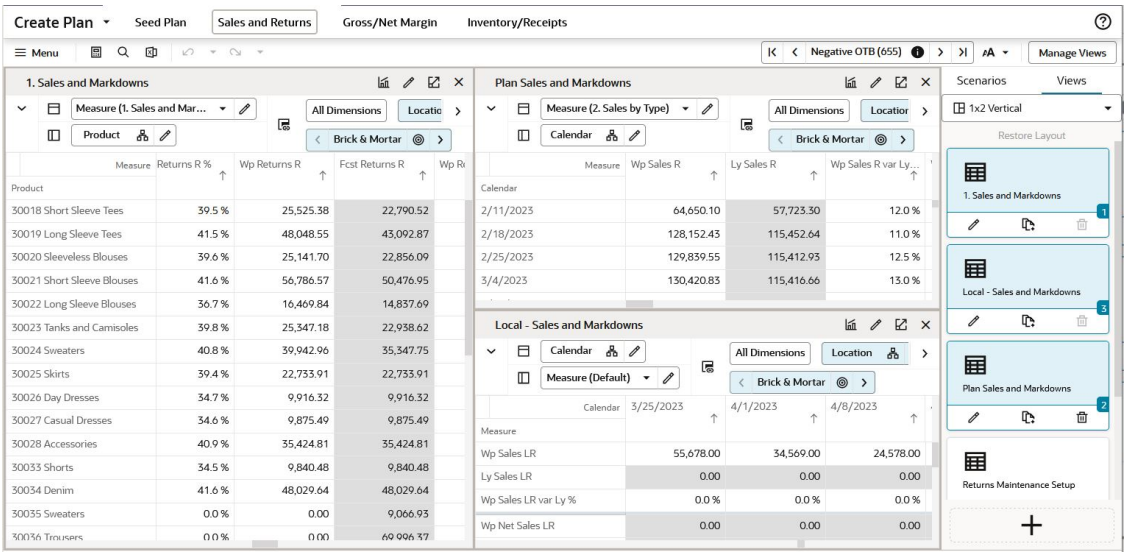

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Figure 9-8 2 x 1 Vertical Layout

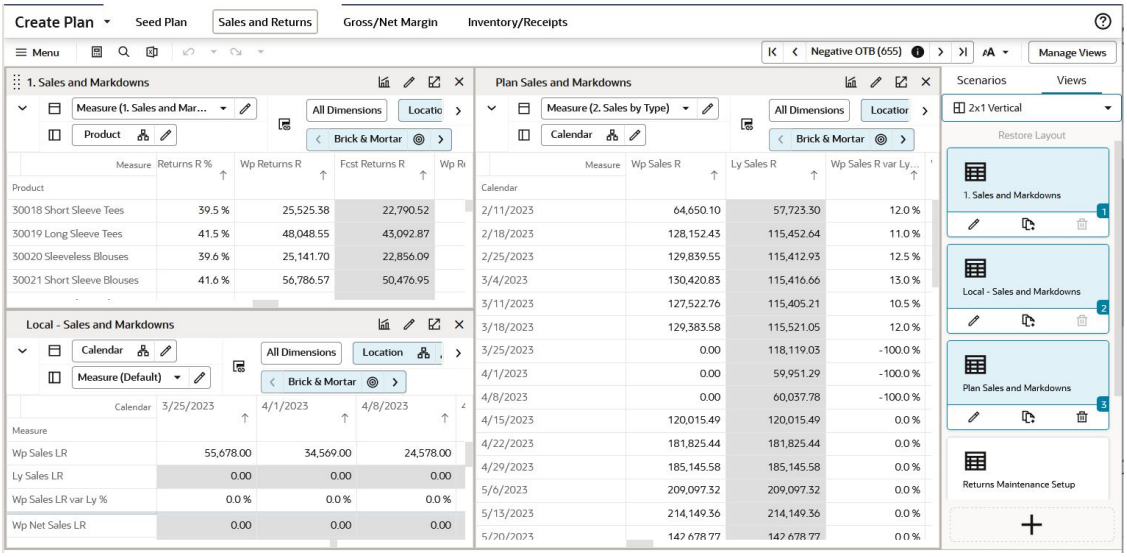

Figure 9-9 1 x 2 Horizontal Layout

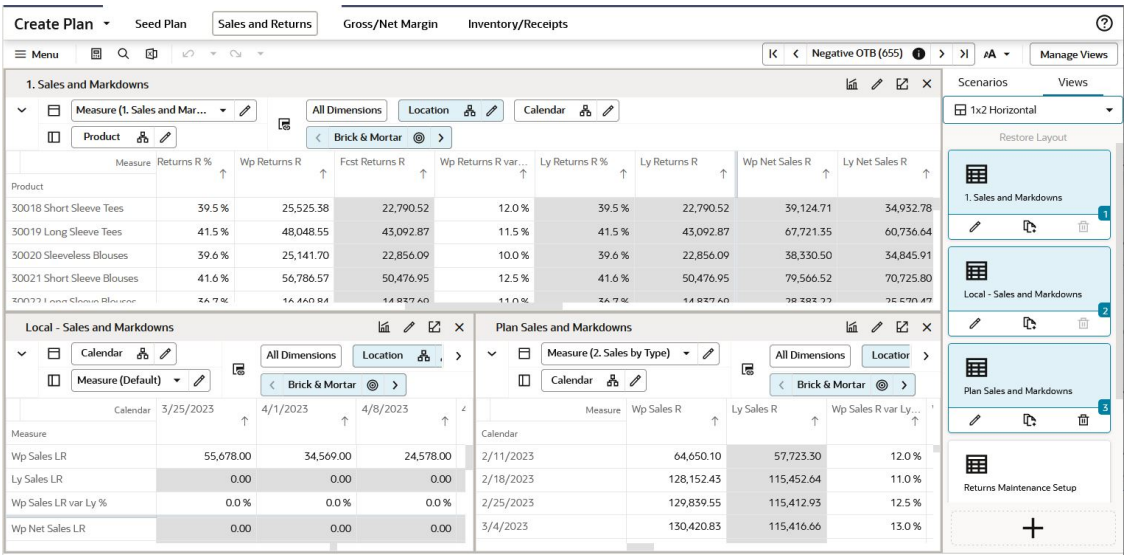

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Figure 9-10 1 x 2 Horizontal (7:3) Layout

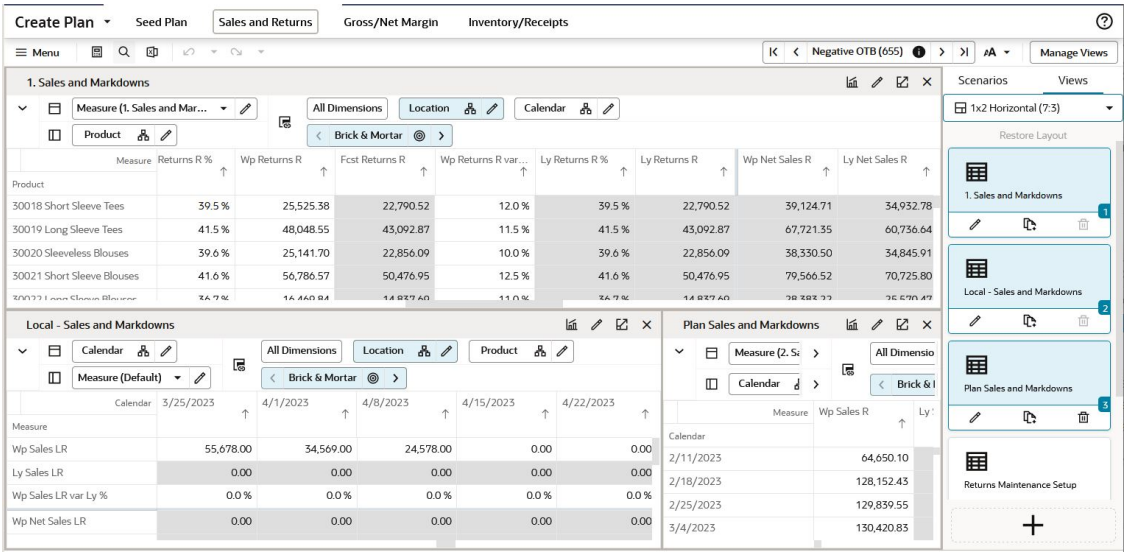

Figure 9-11 1 x 2 Horizontal (3:7) Layout

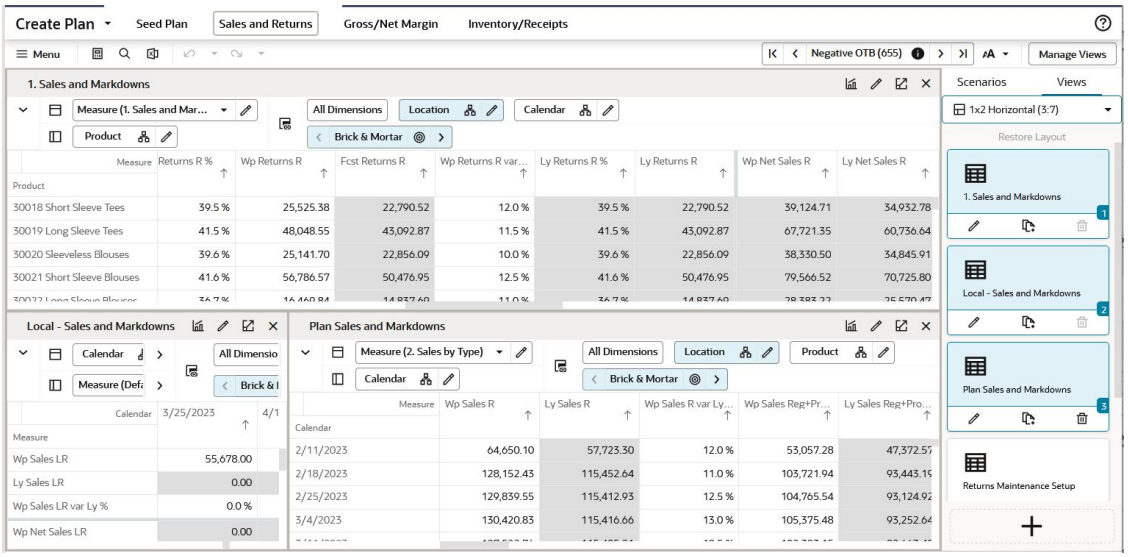

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Figure 9-12 2 x 1 Horizontal Layout

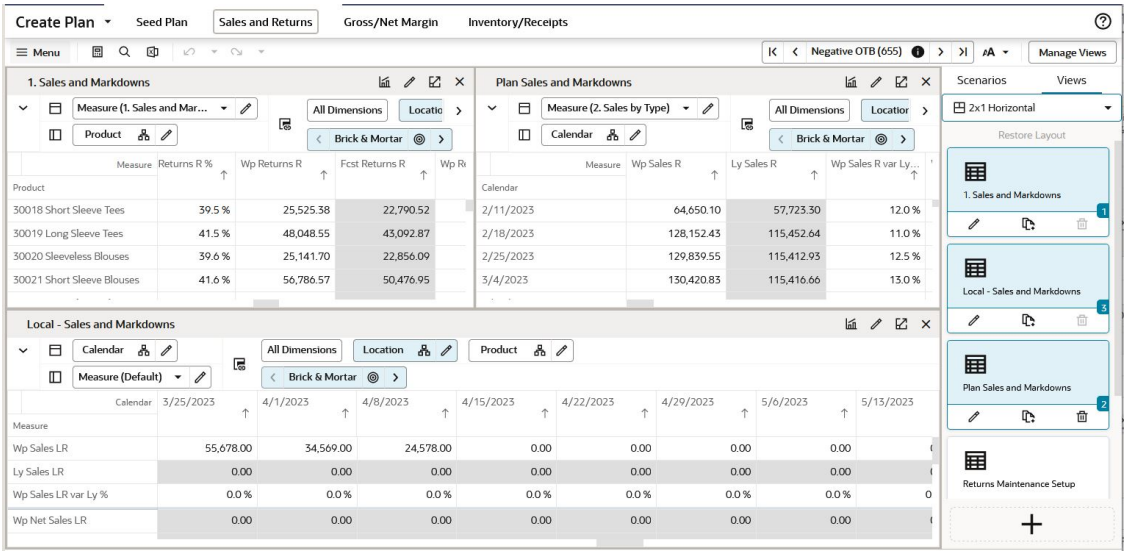

Figure 9-13 2 x 1 Horizontal (7:3) Layout

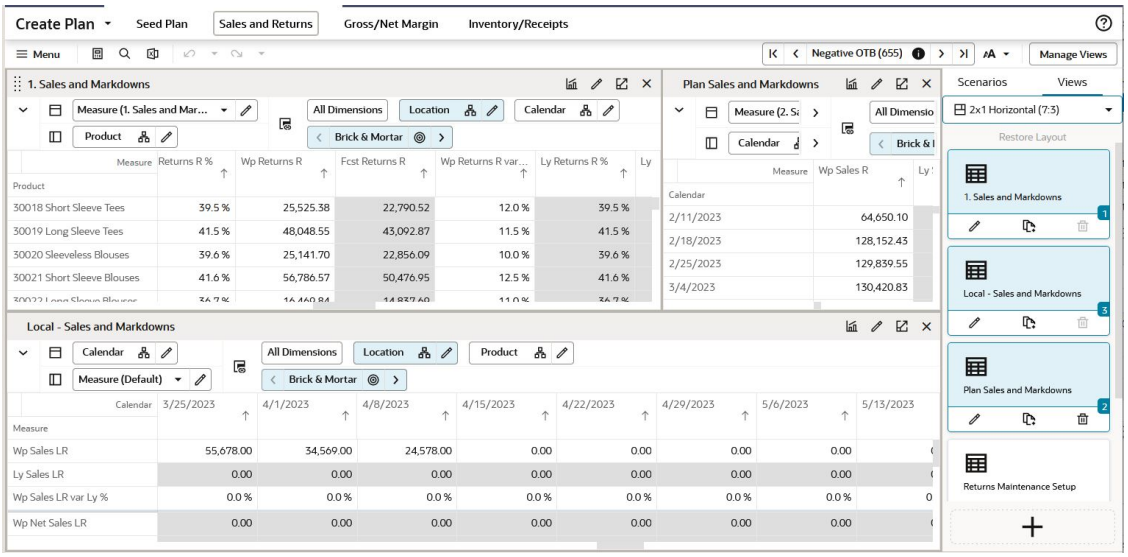

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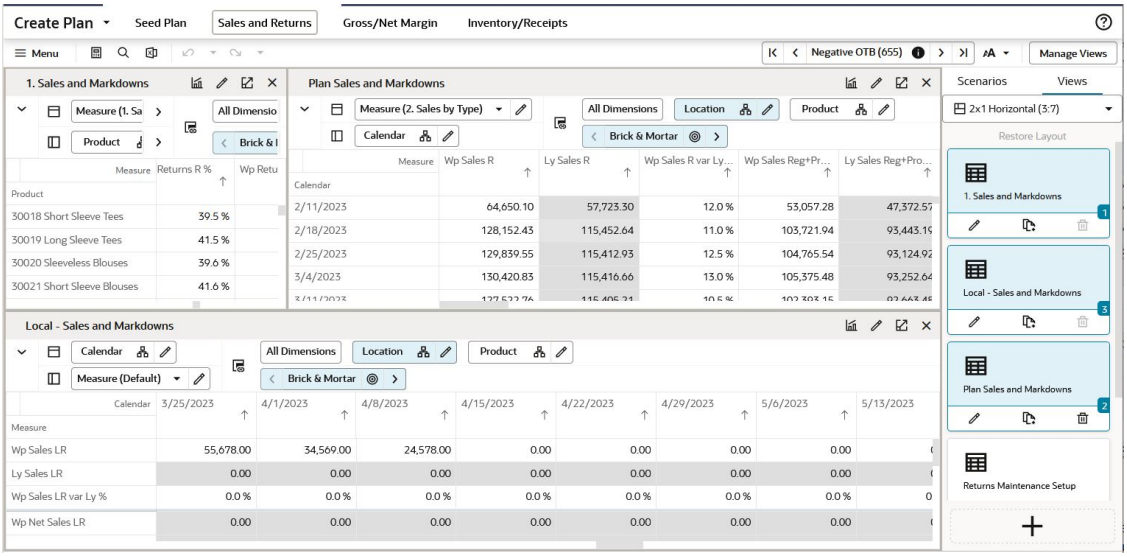
Figure 9-14 2 x 1 Horizontal (3:7) Layout

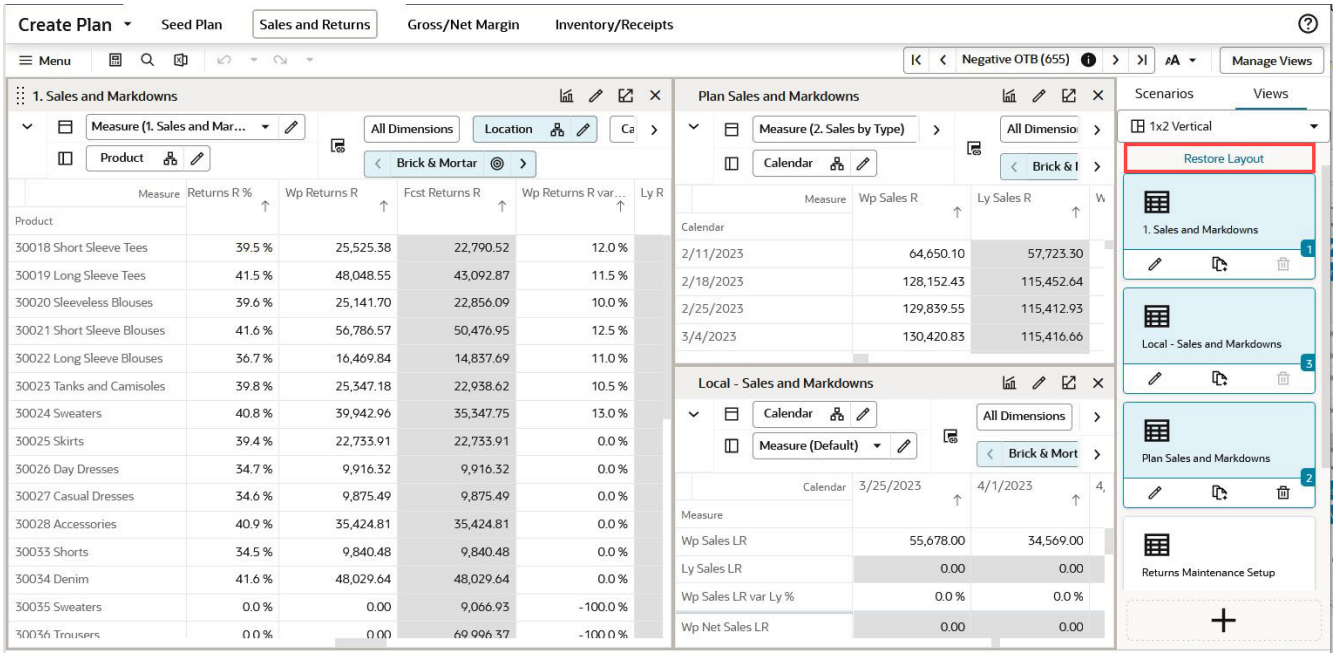


Re-Size View Layout

The view layout size can be adjusted manually to make the layout optimal for data review. Views can easily be adjusted when you select then hold and drag the vertical or horizontal dividing space between the views. When moving the horizontal diving space, the minimum height of each view can be no less than 20% of the width. When moving vertical diving space, the minimum height of each view can be no less than 15% of the width.

Use the Restore Layout link to reset views back to the default size of the selected view option. Restore Layout is accessed from Global menu Views option or directly from top of the view tile. Figure 9-15 shows the link for **Restore Layout**.

Figure 9-15 Restore Layout



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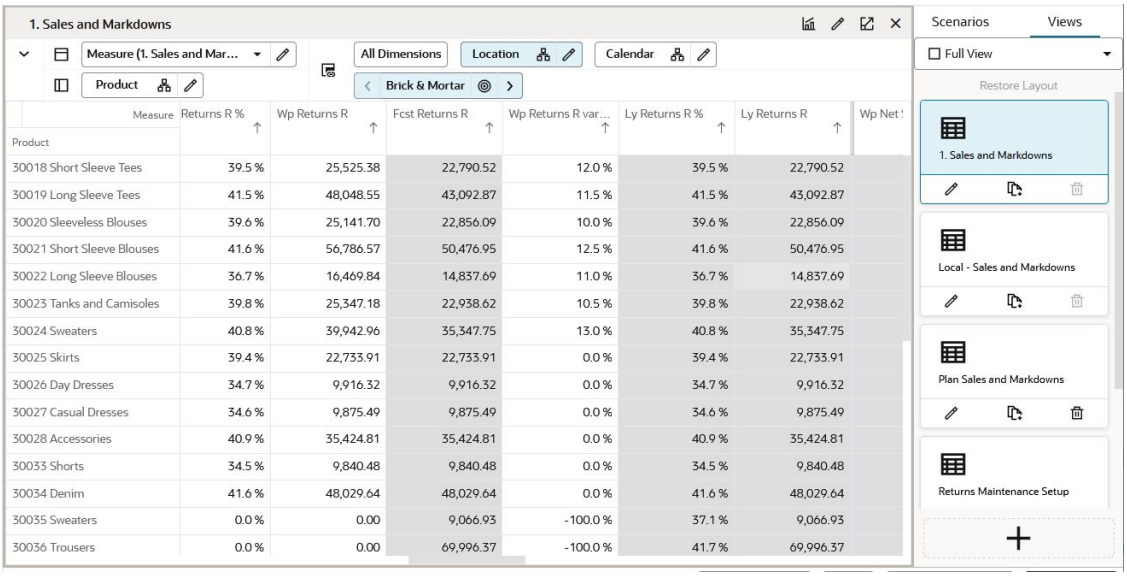
View List

The available views are listed on the right side of the screen in the View Management Drawer, as shown in Figure 9-16.

Figure 9-16 View List

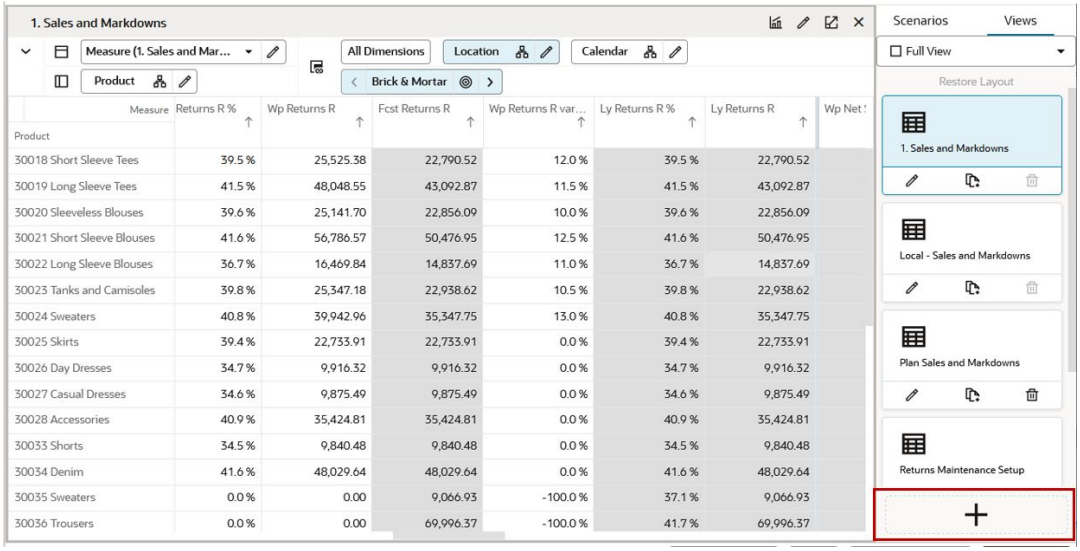


Creating a View

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 9-17 Creating a View



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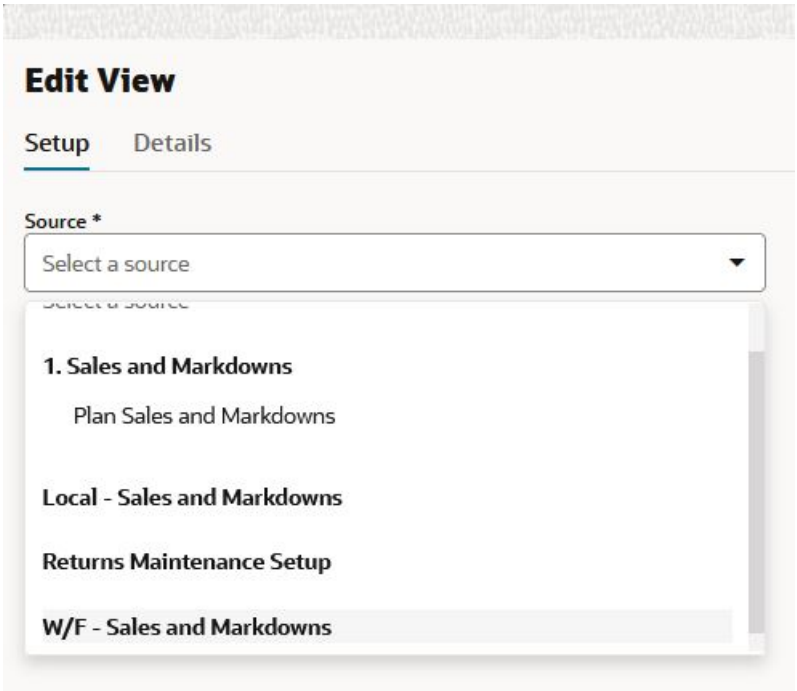
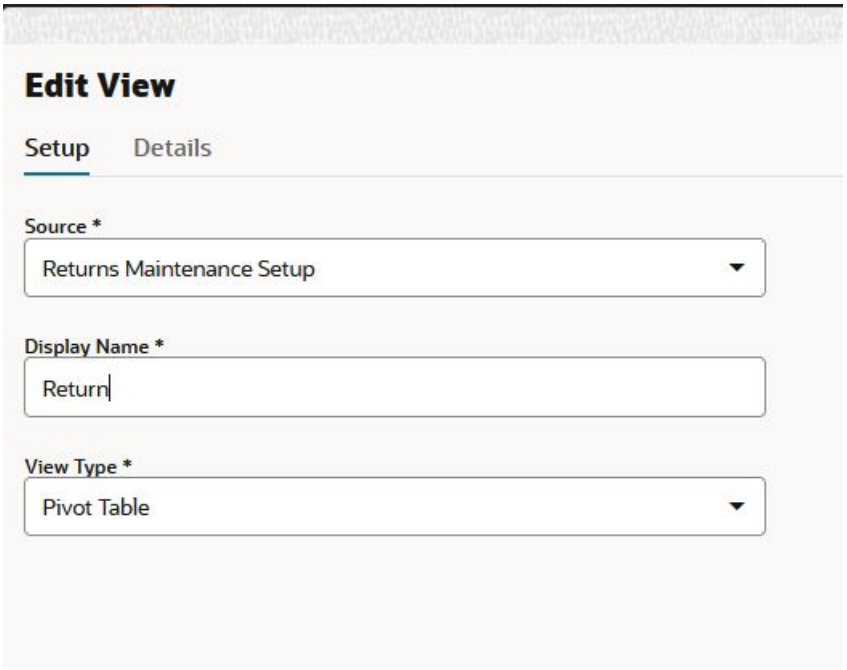
2. In Edit View, on the Setup tab, select a Source from the list. The options are limited to the other existing views in the View Management Drawer.

Figure 9-18 Edit View Setup Options



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

Figure 9-19 Display Name



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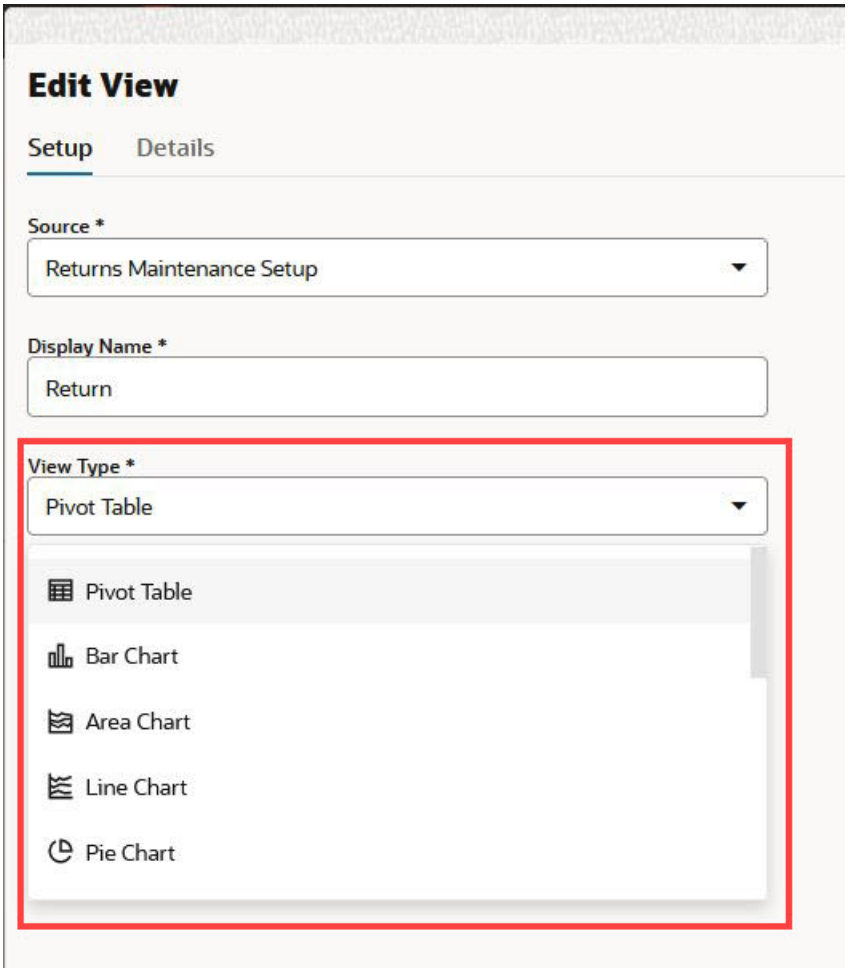
4. Select the type of view to be created, such as Pivot Table, Line Chart, Pie Chart, and so on.

Figure 9-20 Type of View



5. In the Edit View window, 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 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.

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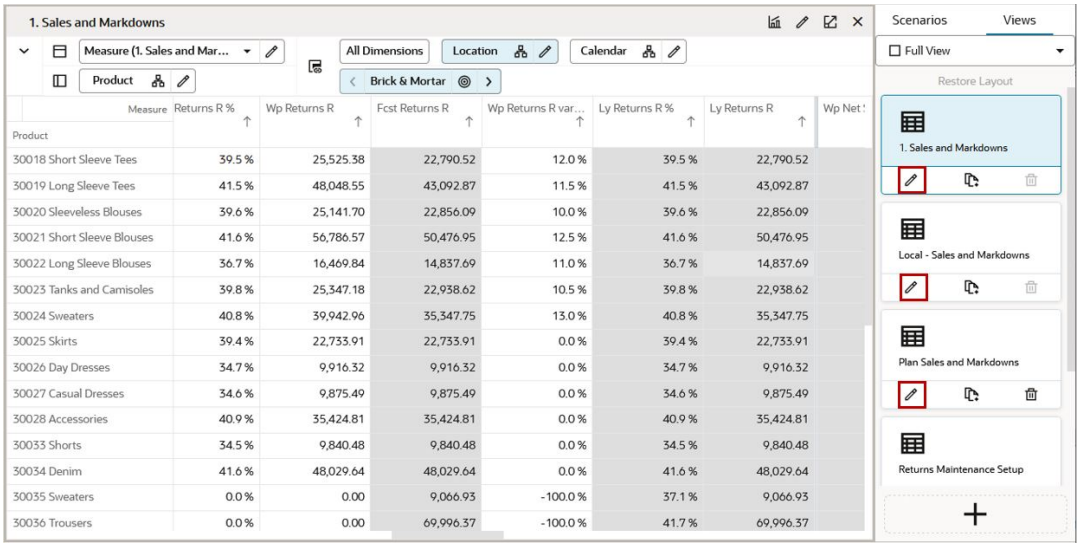
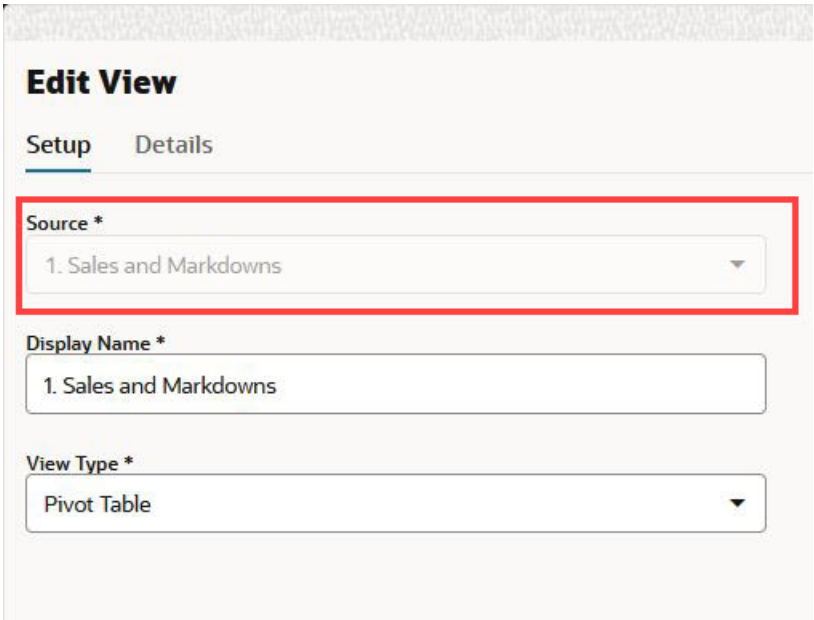
Figure 9-21 Modifying a View



Product	Returns R %	Wp Returns R	Fcst Returns R	Wp Returns R var...	Ly Returns R %	Ly Returns R	Wp Net
30018 Short Sleeve Tees	39.5 %	25,525.38	22,790.52	12.0 %	39.5 %	22,790.52	
30019 Long Sleeve Tees	41.5 %	48,048.55	43,092.87	11.5 %	41.5 %	43,092.87	
30020 Sleeveless Blouses	39.6 %	25,141.70	22,856.09	10.0 %	39.6 %	22,856.09	
30021 Short Sleeve Blouses	41.6 %	56,786.57	50,476.95	12.5 %	41.6 %	50,476.95	
30022 Long Sleeve Blouses	36.7 %	16,469.84	14,837.69	11.0 %	36.7 %	14,837.69	
30023 Tanks and Camisoles	39.8 %	25,347.18	22,938.62	10.5 %	39.8 %	22,938.62	
30024 Sweaters	40.8 %	39,942.96	35,347.75	13.0 %	40.8 %	35,347.75	
30025 Skirts	39.4 %	22,733.91	22,733.91	0.0 %	39.4 %	22,733.91	
30026 Day Dresses	34.7 %	9,916.32	9,916.32	0.0 %	34.7 %	9,916.32	
30027 Casual Dresses	34.6 %	9,875.49	9,875.49	0.0 %	34.6 %	9,875.49	
30028 Accessories	40.9 %	35,424.81	35,424.81	0.0 %	40.9 %	35,424.81	
30033 Shorts	34.5 %	9,840.48	9,840.48	0.0 %	34.5 %	9,840.48	
30034 Denim	41.6 %	48,029.64	48,029.64	0.0 %	41.6 %	48,029.64	
30035 Sweaters	0.0 %	0.00	9,066.93	-100.0 %	37.1 %	9,066.93	
30036 Trousers	0.0 %	0.00	69,996.37	-100.0 %	41.7 %	69,996.37	

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 9-22 Edit View > Source Menu (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.

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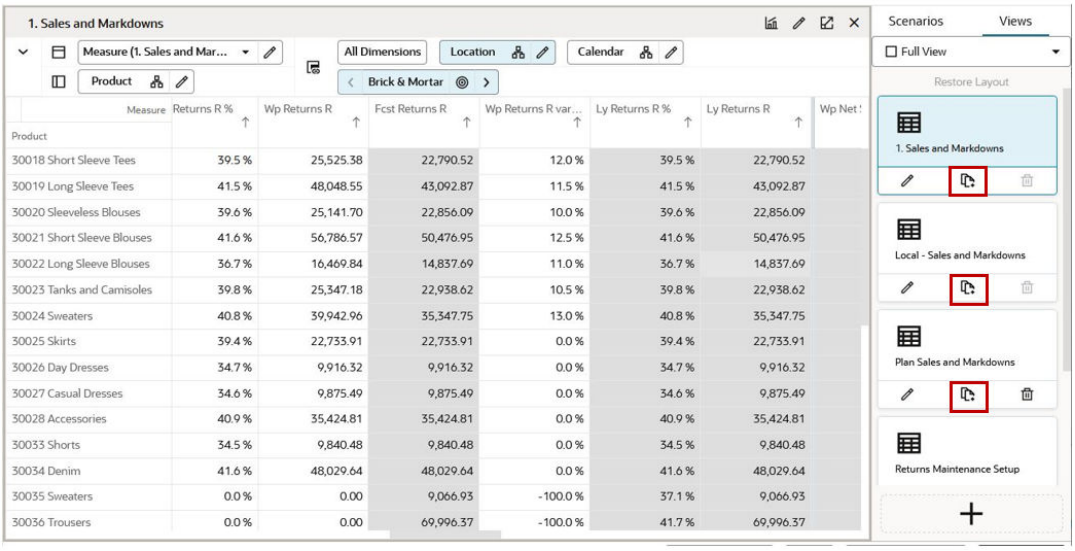
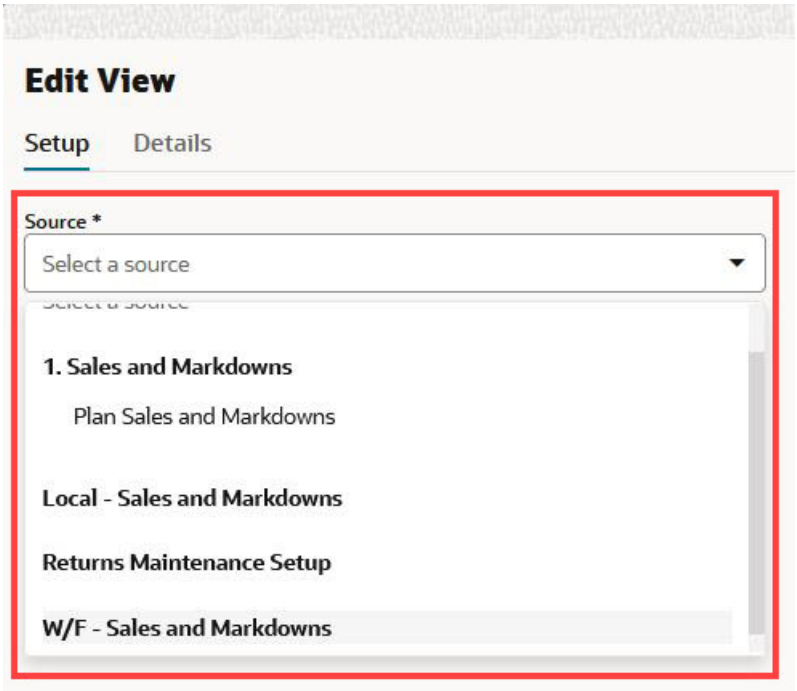
Figure 9-23 Copying a View



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

Figure 9-24 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.

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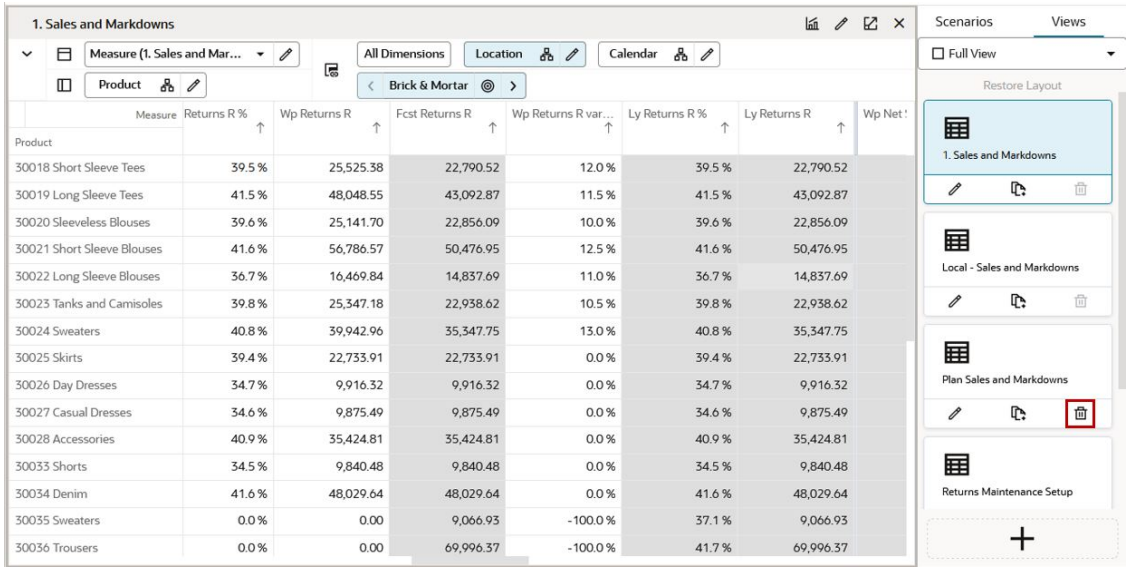
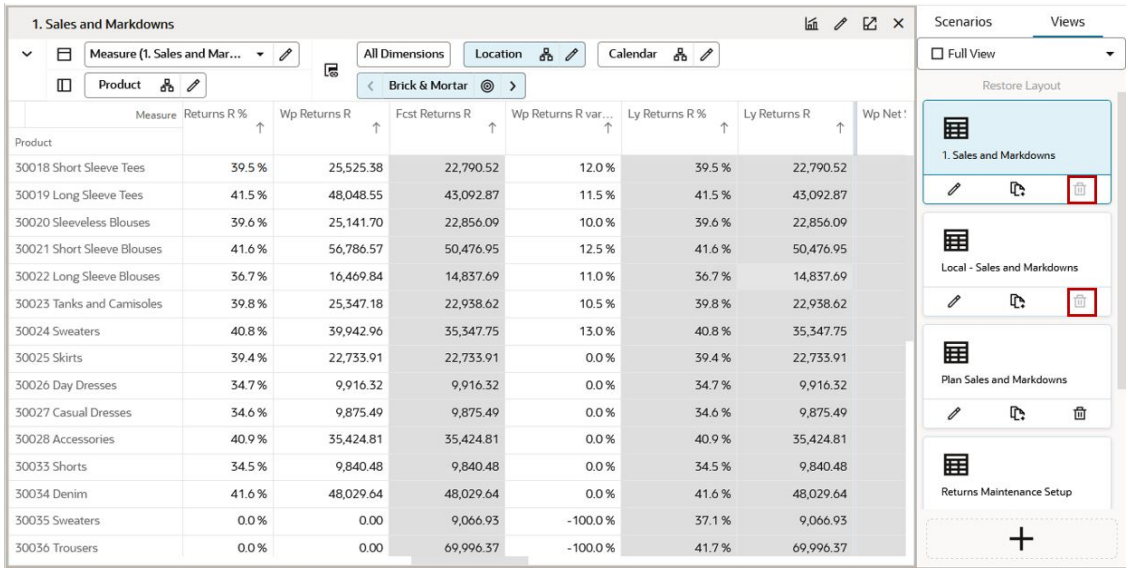
Figure 9-25 Deleting a View



Product	Returns R %	Wp Returns R	Fcst Returns R	Wp Returns R var...	Ly Returns R %	Ly Returns R	Wp Net
30018 Short Sleeve Tees	39.5 %	25,525.38	22,790.52	12.0 %	39.5 %	22,790.52	
30019 Long Sleeve Tees	41.5 %	48,048.55	43,092.87	11.5 %	41.5 %	43,092.87	
30020 Sleeveless Blouses	39.6 %	25,141.70	22,856.09	10.0 %	39.6 %	22,856.09	
30021 Short Sleeve Blouses	41.6 %	56,786.57	50,476.95	12.5 %	41.6 %	50,476.95	
30022 Long Sleeve Blouses	36.7 %	16,469.84	14,837.69	11.0 %	36.7 %	14,837.69	
30023 Tanks and Camisoles	39.8 %	25,347.18	22,938.62	10.5 %	39.8 %	22,938.62	
30024 Sweaters	40.8 %	39,942.96	35,347.75	13.0 %	40.8 %	35,347.75	
30025 Skirts	39.4 %	22,733.91	22,733.91	0.0 %	39.4 %	22,733.91	
30026 Day Dresses	34.7 %	9,916.32	9,916.32	0.0 %	34.7 %	9,916.32	
30027 Casual Dresses	34.6 %	9,875.49	9,875.49	0.0 %	34.6 %	9,875.49	
30028 Accessories	40.9 %	35,424.81	35,424.81	0.0 %	40.9 %	35,424.81	
30033 Shorts	34.5 %	9,840.48	9,840.48	0.0 %	34.5 %	9,840.48	
30034 Denim	41.6 %	48,029.64	48,029.64	0.0 %	41.6 %	48,029.64	
30035 Sweaters	0.0 %	0.00	9,066.93	-100.0 %	37.1 %	9,066.93	
30036 Trousers	0.0 %	0.00	69,996.37	-100.0 %	41.7 %	69,996.37	

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

Figure 9-26 Disabled Delete Option



Product	Returns R %	Wp Returns R	Fcst Returns R	Wp Returns R var...	Ly Returns R %	Ly Returns R	Wp Net
30018 Short Sleeve Tees	39.5 %	25,525.38	22,790.52	12.0 %	39.5 %	22,790.52	
30019 Long Sleeve Tees	41.5 %	48,048.55	43,092.87	11.5 %	41.5 %	43,092.87	
30020 Sleeveless Blouses	39.6 %	25,141.70	22,856.09	10.0 %	39.6 %	22,856.09	
30021 Short Sleeve Blouses	41.6 %	56,786.57	50,476.95	12.5 %	41.6 %	50,476.95	
30022 Long Sleeve Blouses	36.7 %	16,469.84	14,837.69	11.0 %	36.7 %	14,837.69	
30023 Tanks and Camisoles	39.8 %	25,347.18	22,938.62	10.5 %	39.8 %	22,938.62	
30024 Sweaters	40.8 %	39,942.96	35,347.75	13.0 %	40.8 %	35,347.75	
30025 Skirts	39.4 %	22,733.91	22,733.91	0.0 %	39.4 %	22,733.91	
30026 Day Dresses	34.7 %	9,916.32	9,916.32	0.0 %	34.7 %	9,916.32	
30027 Casual Dresses	34.6 %	9,875.49	9,875.49	0.0 %	34.6 %	9,875.49	
30028 Accessories	40.9 %	35,424.81	35,424.81	0.0 %	40.9 %	35,424.81	
30033 Shorts	34.5 %	9,840.48	9,840.48	0.0 %	34.5 %	9,840.48	
30034 Denim	41.6 %	48,029.64	48,029.64	0.0 %	41.6 %	48,029.64	
30035 Sweaters	0.0 %	0.00	9,066.93	-100.0 %	37.1 %	9,066.93	
30036 Trousers	0.0 %	0.00	69,996.37	-100.0 %	41.7 %	69,996.37	

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.

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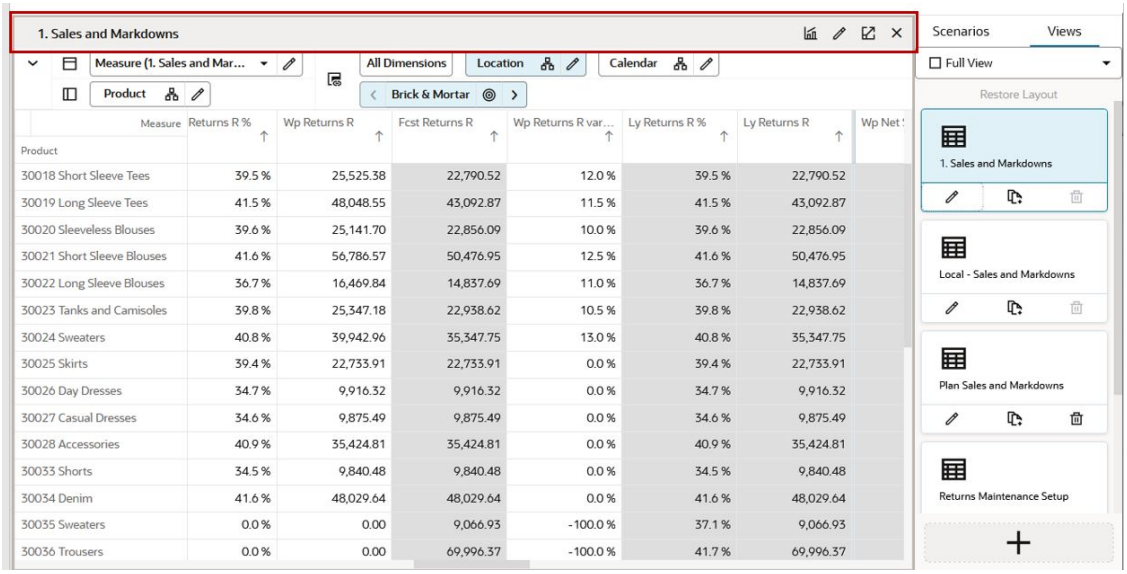
View Title Bar

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

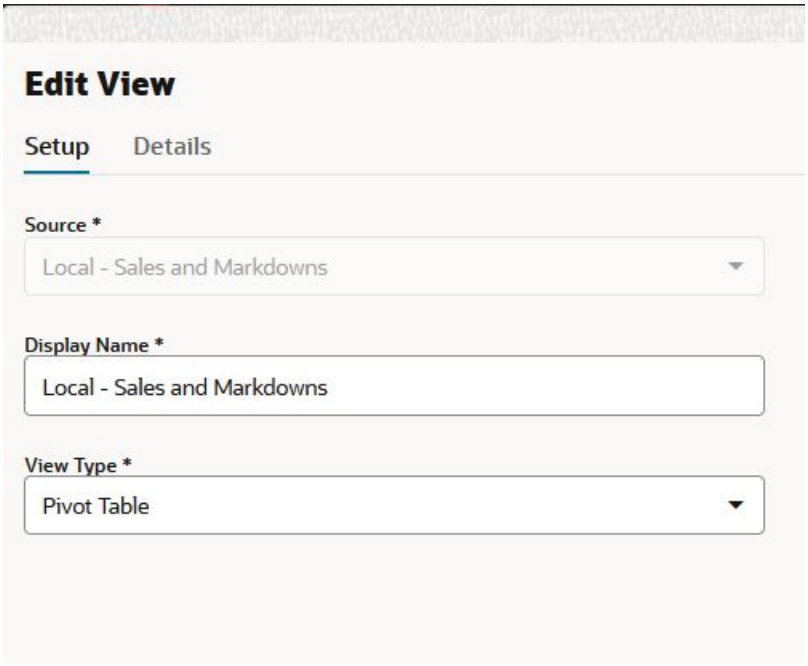
Figure 9-27 View Title Bar



Product	Returns R %	Wp Returns R	Fcst Returns R	Wp Returns R var...	Ly Returns R %	Ly Returns R	Wp Net
30018 Short Sleeve Tees	39.5 %	25,525.38	22,790.52	12.0 %	39.5 %	22,790.52	
30019 Long Sleeve Tees	41.5 %	48,048.55	43,092.87	11.5 %	41.5 %	43,092.87	
30020 Sleeveless Blouses	39.6 %	25,141.70	22,856.09	10.0 %	39.6 %	22,856.09	
30021 Short Sleeve Blouses	41.6 %	56,786.57	50,476.95	12.5 %	41.6 %	50,476.95	
30022 Long Sleeve Blouses	36.7 %	16,469.84	14,837.69	11.0 %	36.7 %	14,837.69	
30023 Tanks and Camisoles	39.8 %	25,347.18	22,938.62	10.5 %	39.8 %	22,938.62	
30024 Sweaters	40.8 %	39,942.96	35,347.75	13.0 %	40.8 %	35,347.75	
30025 Skirts	39.4 %	22,733.91	22,733.91	0.0 %	39.4 %	22,733.91	
30026 Day Dresses	34.7 %	9,916.32	9,916.32	0.0 %	34.7 %	9,916.32	
30027 Casual Dresses	34.6 %	9,875.49	9,875.49	0.0 %	34.6 %	9,875.49	
30028 Accessories	40.9 %	35,424.81	35,424.81	0.0 %	40.9 %	35,424.81	
30033 Shorts	34.5 %	9,840.48	9,840.48	0.0 %	34.5 %	9,840.48	
30034 Denim	41.6 %	48,029.64	48,029.64	0.0 %	41.6 %	48,029.64	
30035 Sweaters	0.0 %	0.00	9,066.93	-100.0 %	37.1 %	9,066.93	
30036 Trousers	0.0 %	0.00	69,996.37	-100.0 %	41.7 %	69,996.37	

The Edit button opens the Edit View window 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 the previously mentioned steps, see Editing Views.

Figure 9-28 Edit View Window



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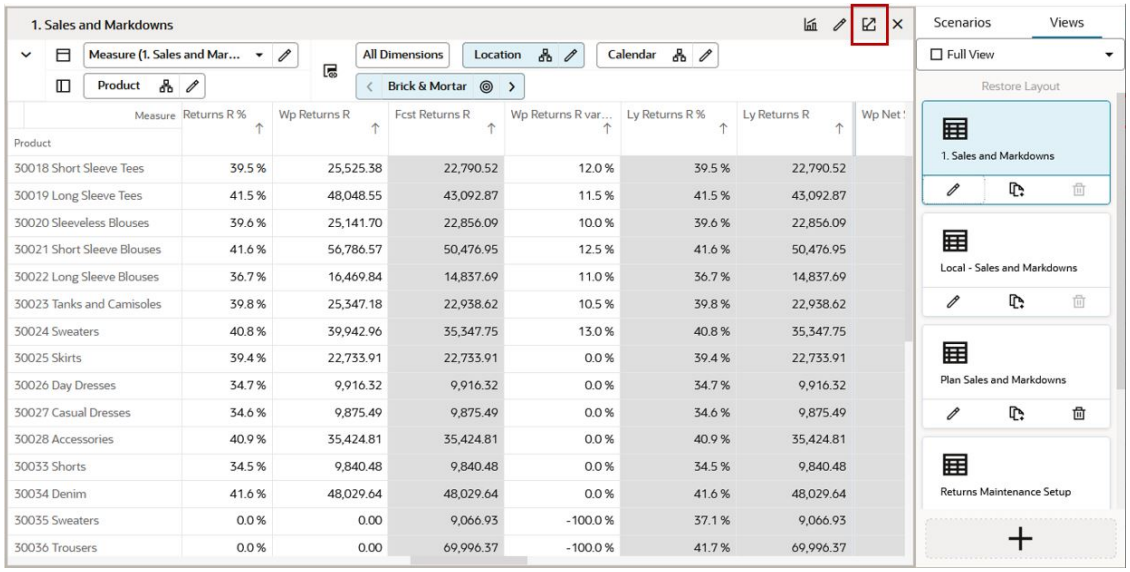
The Expand button maximizes and detaches the view.

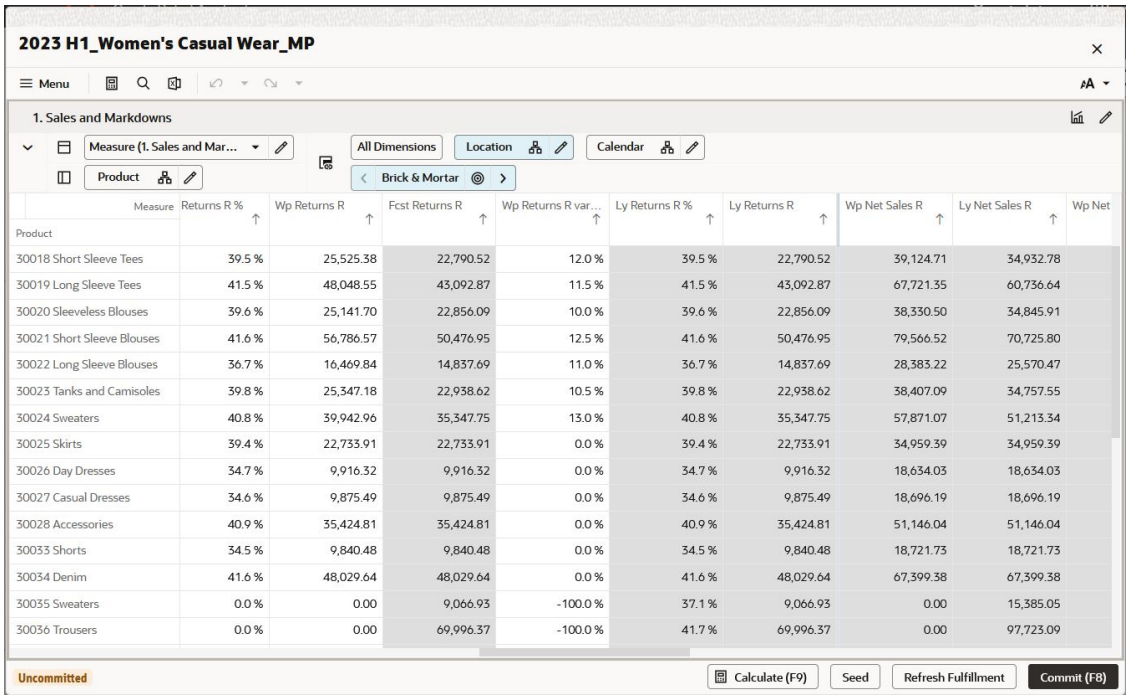
Figure 9-29 Expand View Button



Product	Returns R %	Wp Returns R	Fcst Returns R	Wp Returns R var...	Ly Returns R %	Ly Returns R	Wp Net
30018 Short Sleeve Tees	39.5 %	25,525.38	22,790.52	12.0 %	39.5 %	22,790.52	
30019 Long Sleeve Tees	41.5 %	48,048.55	43,092.87	11.5 %	41.5 %	43,092.87	
30020 Sleeveless Blouses	39.6 %	25,141.70	22,856.09	10.0 %	39.6 %	22,856.09	
30021 Short Sleeve Blouses	41.6 %	56,786.57	50,476.95	12.5 %	41.6 %	50,476.95	
30022 Long Sleeve Blouses	36.7 %	16,469.84	14,837.69	11.0 %	36.7 %	14,837.69	
30023 Tanks and Camisoles	39.8 %	25,347.18	22,938.62	10.5 %	39.8 %	22,938.62	
30024 Sweaters	40.8 %	39,942.96	35,347.75	13.0 %	40.8 %	35,347.75	
30025 Skirts	39.4 %	22,733.91	22,733.91	0.0 %	39.4 %	22,733.91	
30026 Day Dresses	34.7 %	9,916.32	9,916.32	0.0 %	34.7 %	9,916.32	
30027 Casual Dresses	34.6 %	9,875.49	9,875.49	0.0 %	34.6 %	9,875.49	
30028 Accessories	40.9 %	35,424.81	35,424.81	0.0 %	40.9 %	35,424.81	
30033 Shorts	34.5 %	9,840.48	9,840.48	0.0 %	34.5 %	9,840.48	
30034 Denim	41.6 %	48,029.64	48,029.64	0.0 %	41.6 %	48,029.64	
30035 Sweaters	0.0 %	0.00	9,066.93	-100.0 %	37.1 %	9,066.93	
30036 Trousers	0.0 %	0.00	69,996.37	-100.0 %	41.7 %	69,996.37	

The detached view has Edit and Close buttons.

Figure 9-30 Detached View with Edit and Close Buttons



Product	Returns R %	Wp Returns R	Fcst Returns R	Wp Returns R var...	Ly Returns R %	Ly Returns R	Wp Net Sales R	Ly Net Sales R	Wp Net
30018 Short Sleeve Tees	39.5 %	25,525.38	22,790.52	12.0 %	39.5 %	22,790.52	39,124.71	34,932.78	
30019 Long Sleeve Tees	41.5 %	48,048.55	43,092.87	11.5 %	41.5 %	43,092.87	67,721.35	60,736.64	
30020 Sleeveless Blouses	39.6 %	25,141.70	22,856.09	10.0 %	39.6 %	22,856.09	38,330.50	34,845.91	
30021 Short Sleeve Blouses	41.6 %	56,786.57	50,476.95	12.5 %	41.6 %	50,476.95	79,566.52	70,725.80	
30022 Long Sleeve Blouses	36.7 %	16,469.84	14,837.69	11.0 %	36.7 %	14,837.69	28,383.22	25,570.47	
30023 Tanks and Camisoles	39.8 %	25,347.18	22,938.62	10.5 %	39.8 %	22,938.62	38,407.09	34,757.55	
30024 Sweaters	40.8 %	39,942.96	35,347.75	13.0 %	40.8 %	35,347.75	57,871.07	51,213.34	
30025 Skirts	39.4 %	22,733.91	22,733.91	0.0 %	39.4 %	22,733.91	34,959.39	34,959.39	
30026 Day Dresses	34.7 %	9,916.32	9,916.32	0.0 %	34.7 %	9,916.32	18,634.03	18,634.03	
30027 Casual Dresses	34.6 %	9,875.49	9,875.49	0.0 %	34.6 %	9,875.49	18,696.19	18,696.19	
30028 Accessories	40.9 %	35,424.81	35,424.81	0.0 %	40.9 %	35,424.81	51,146.04	51,146.04	
30033 Shorts	34.5 %	9,840.48	9,840.48	0.0 %	34.5 %	9,840.48	18,721.73	18,721.73	
30034 Denim	41.6 %	48,029.64	48,029.64	0.0 %	41.6 %	48,029.64	67,399.38	67,399.38	
30035 Sweaters	0.0 %	0.00	9,066.93	-100.0 %	37.1 %	9,066.93	0.00	15,385.05	
30036 Trousers	0.0 %	0.00	69,996.37	-100.0 %	41.7 %	69,996.37	0.00	97,723.09	

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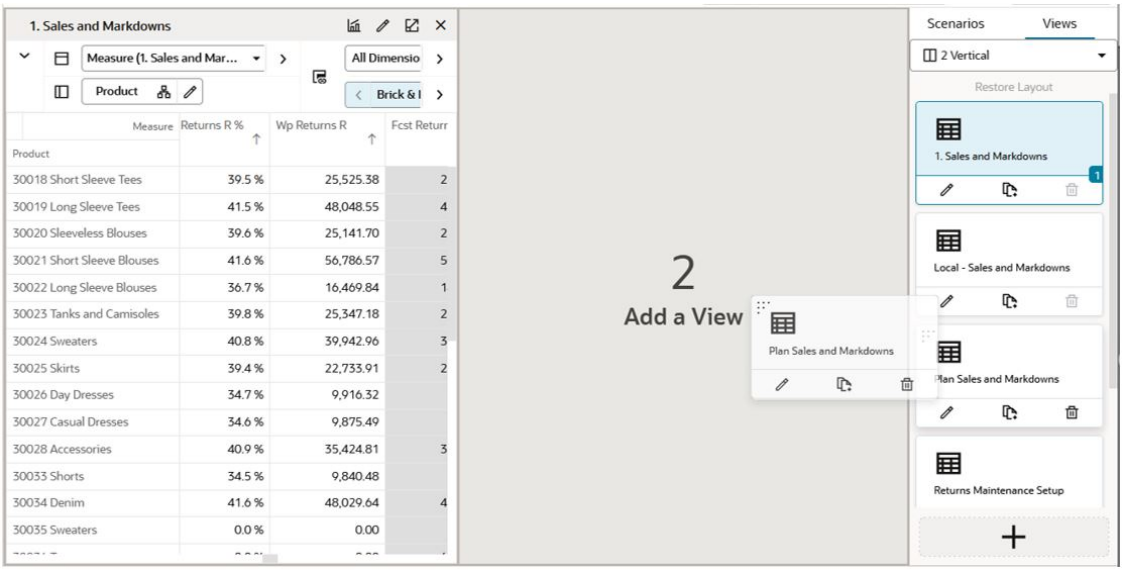
Adding a View to a Layout

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.

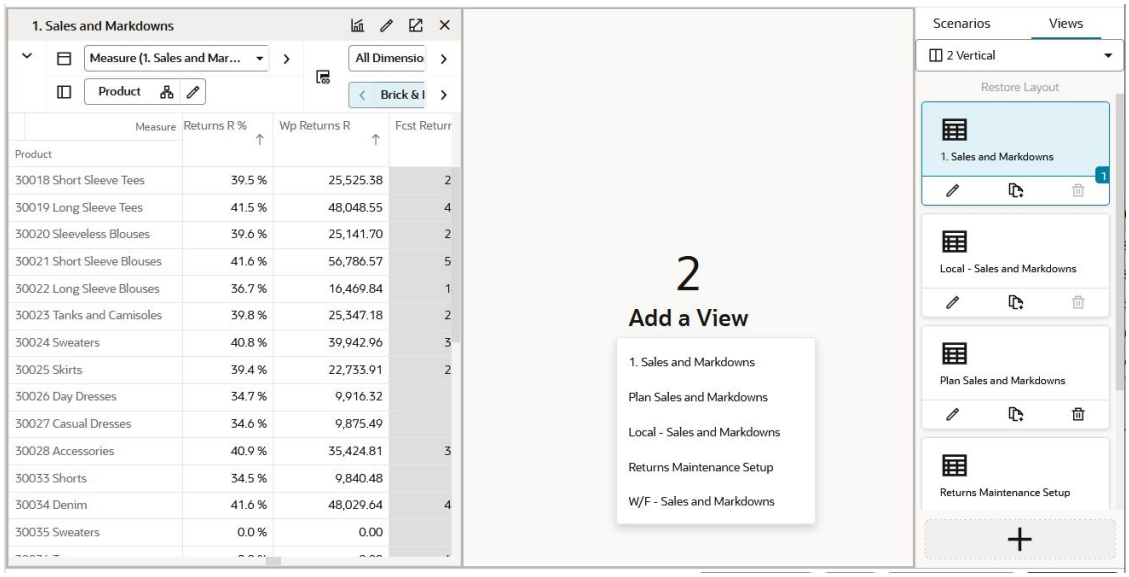
You can click the view you want to see to add it to a blank layout section. It will fill the sections sequentially. To see a different view later, drag and drop the view in the required section.

Figure 9-31 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 9-32 Add a View



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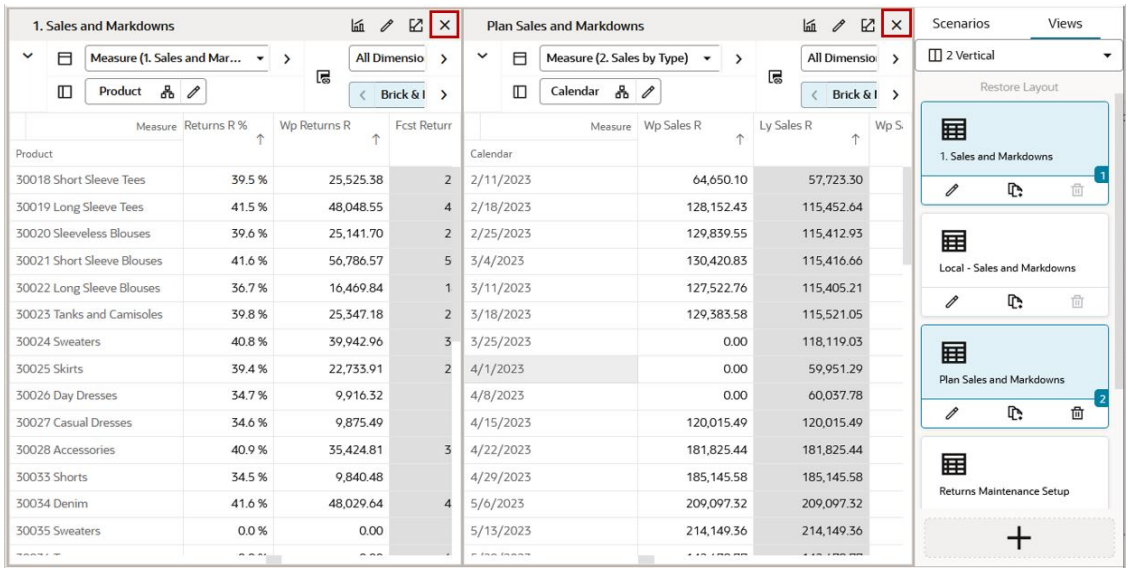
Removing a View from a Layout

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

Figure 9-33 Remove View from Layout

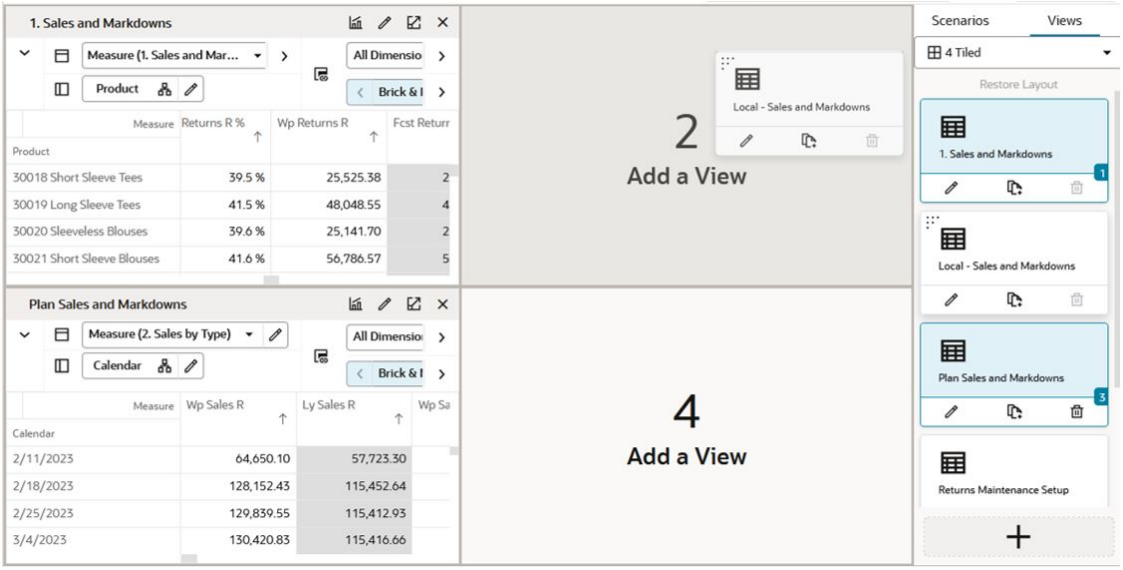


Moving a View

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 9-34, to move the view Local - Sales and Markdowns from the layout location 3 to layout location 2, drag the view Local - Sales and Markdowns from the View Management Drawer to layout location 2.

Figure 9-34 Moving a View (Drag and Drop)



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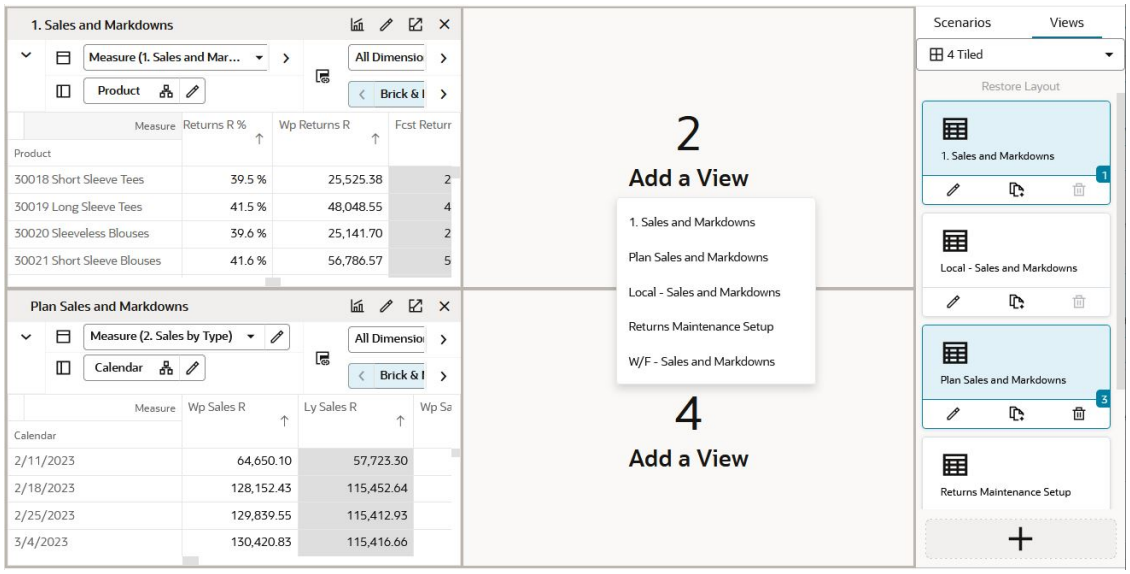
You can also click the **Add View** button in layout location 2 and select Local - Sales and Markdowns from the list in order to move the view from location 3 to location 2.

Figure 9-35 Moving a View (Add View Button)

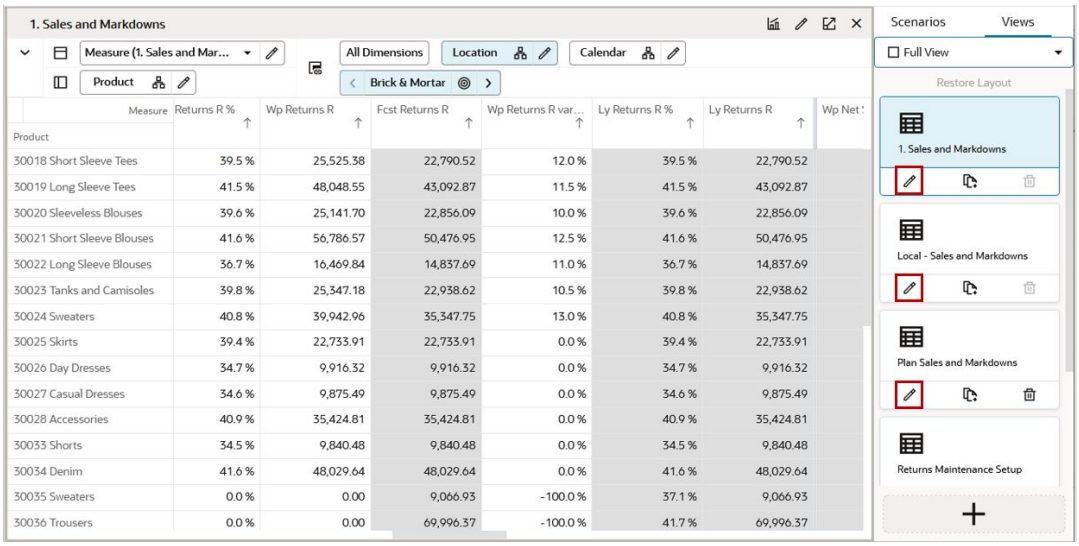


Renaming a View

A view can be renamed in the Edit View window.

1. Click **Edit** to open the Edit View window.

Figure 9-36 Renaming a View



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

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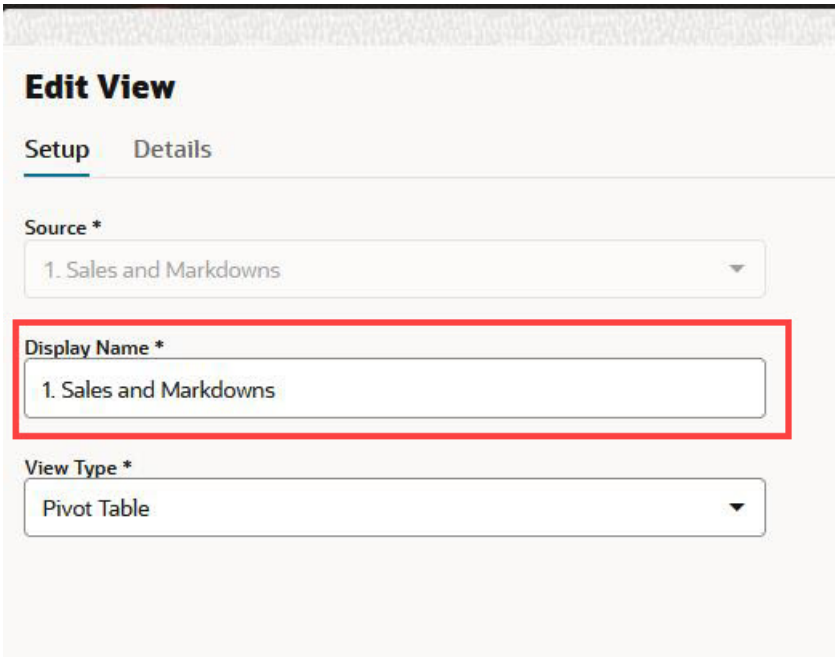
Figure 9-37 Change the Display Name



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 Synchronized Z-axis Scrolling 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 is not visible.

Synchronized Z-axis Scrolling is useful when you want to compare multiple views containing the same page or slice dimension. Synchronized Z-axis Scrolling may be saved using formatting.

To enable Synchronized Z-axis Scrolling, click **Synchronize Z-axis** in the Z-axis and Dimension Tiles area, as shown in Figure 9-38 and Figure 9-39.

When the Page Edge and Dimension Tile Area is collapsed, you can synchronize Z-axis Scrolling using the **Action** menu on the view . In the collapsed Page Edge area, a synchronized view is displayed using the Z-axis Synchronized icon, as shown in Figure 9-40.

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Figure 9-38 View Before Z-axis Synchronization

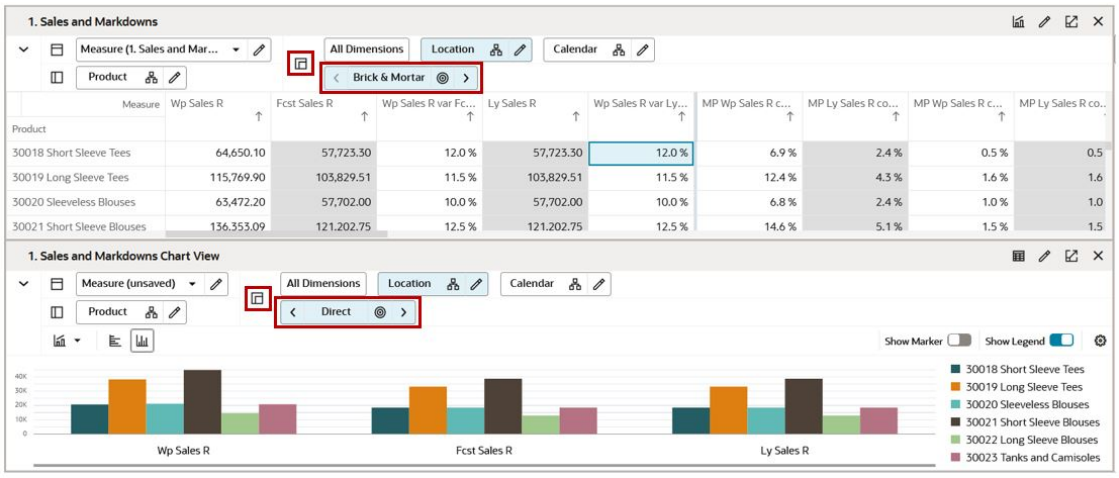

Figure 9-39 Enabling Z-axis Synchronization

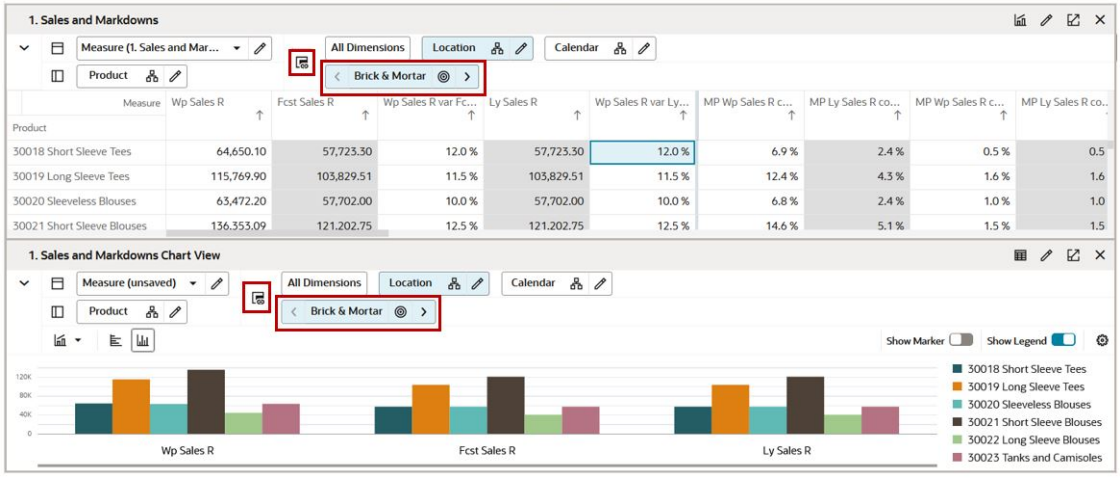

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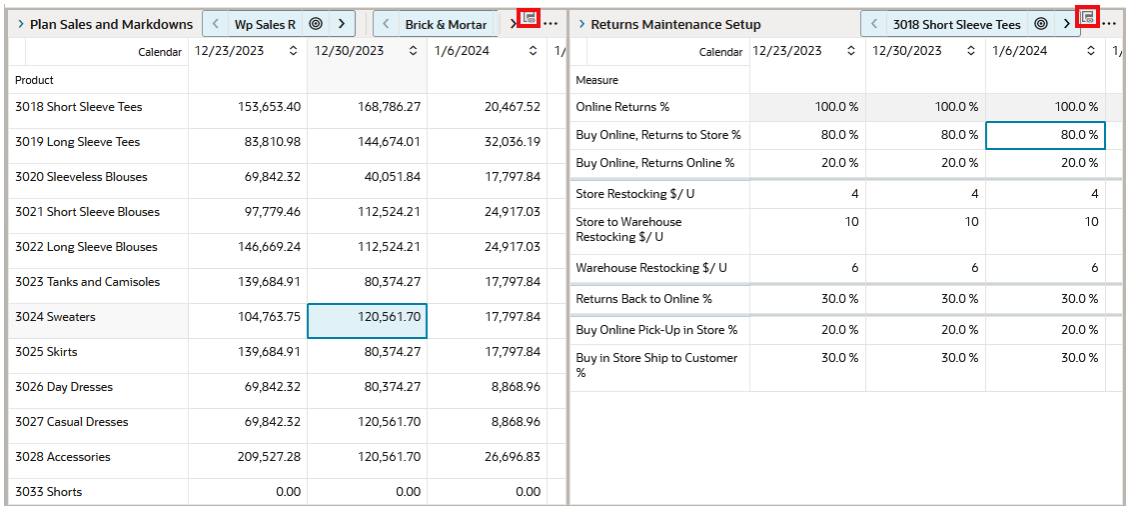
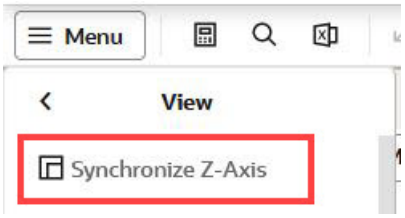
Figure 9-40 Z-axis Synchronized in a Collapsed Page Edge



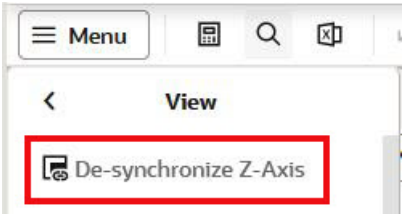
You can also enable Synchronize Z-axis by clicking **Menu**, and then **View**, and then **Synchronize Z-axis**, as shown in Figure 9-41.

Figure 9-41 Synchronize Z-axis from the View Menu



You can also disable Synchronize Z-axis by clicking **Menu**, and then **View**, and then **De-synchronize Z-axis**, as shown in Figure 9-42.

Figure 9-42 De-synchronize Z-axis from View Menu



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10

Charts

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

Viewing Charts

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

You can view the existing chart views in the Full View, 2-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 10-1 Chart in Full View Mode

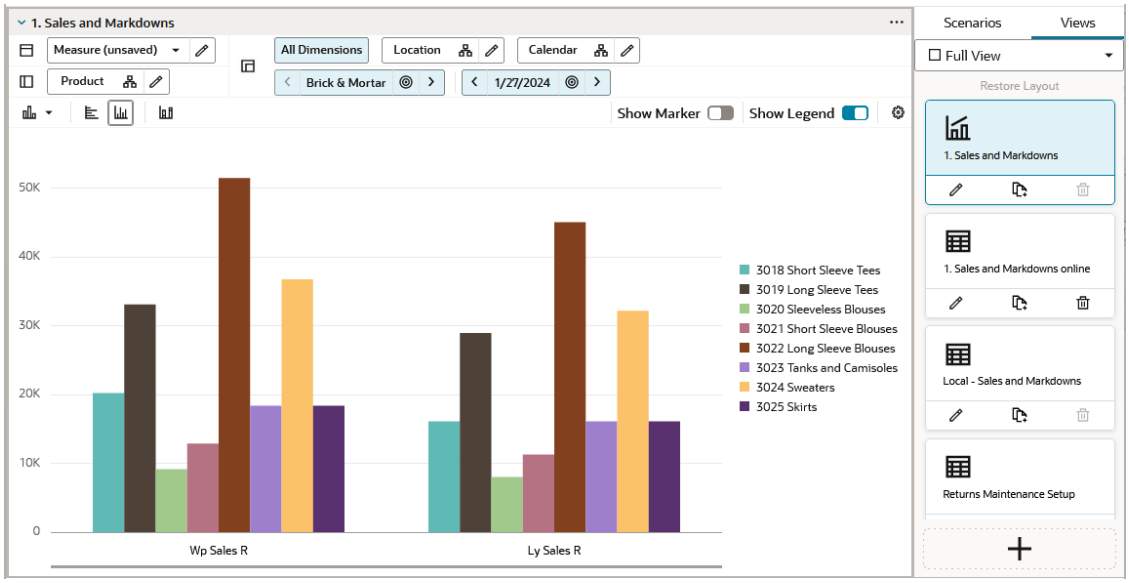

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Figure 10-2 Chart in 2-Horizontal View Mode

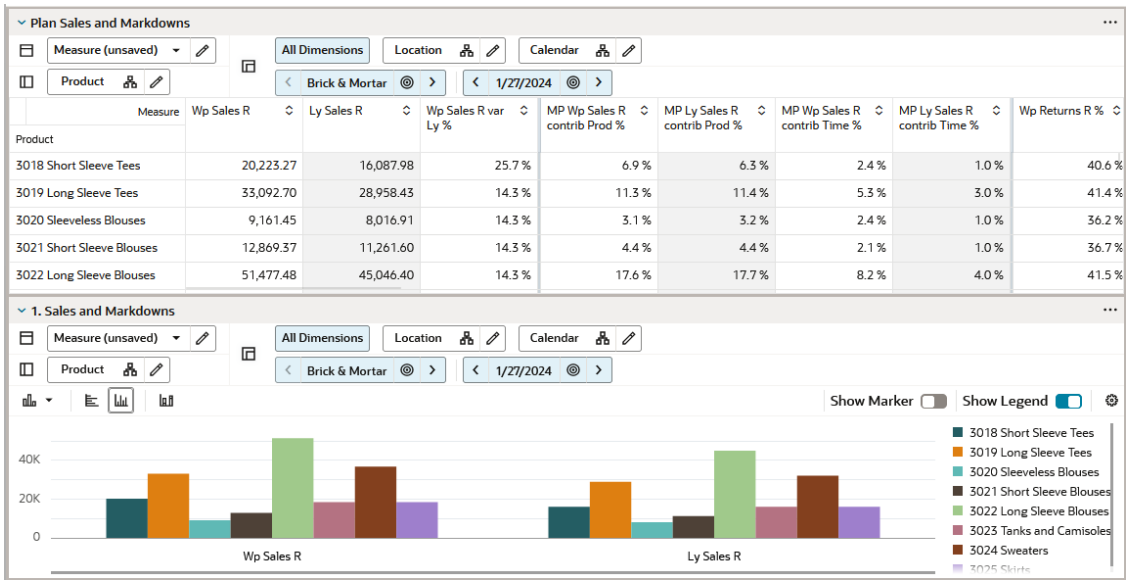
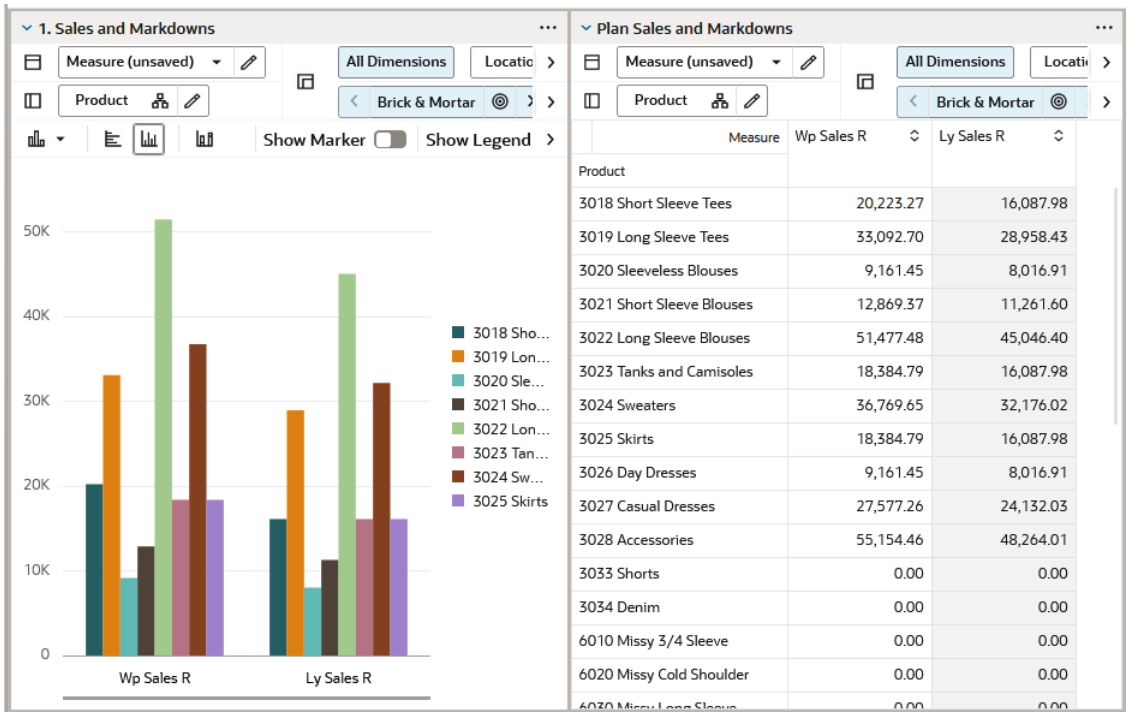


Figure 10-3 Chart in 2-Vertical View Mode



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.

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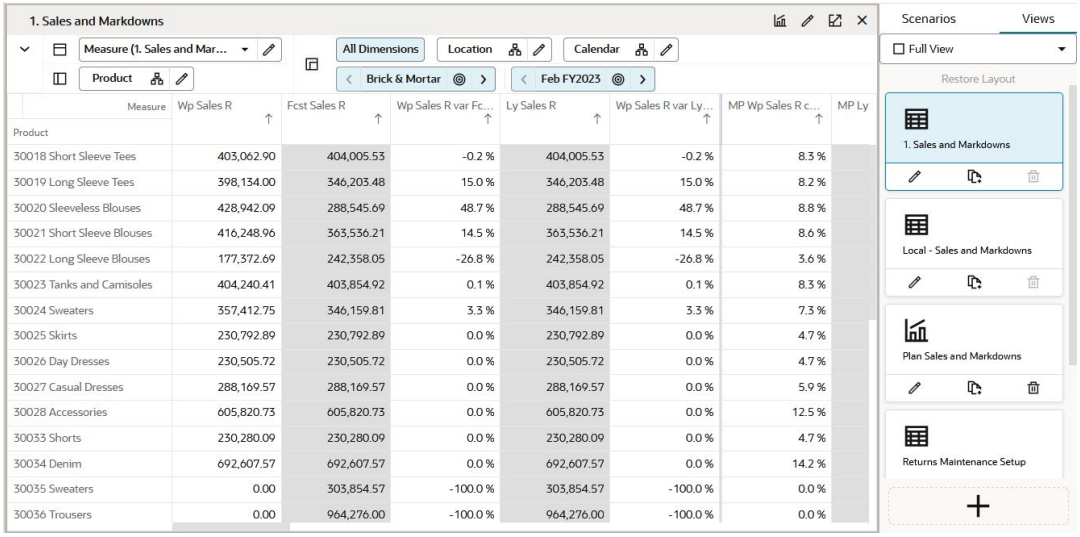
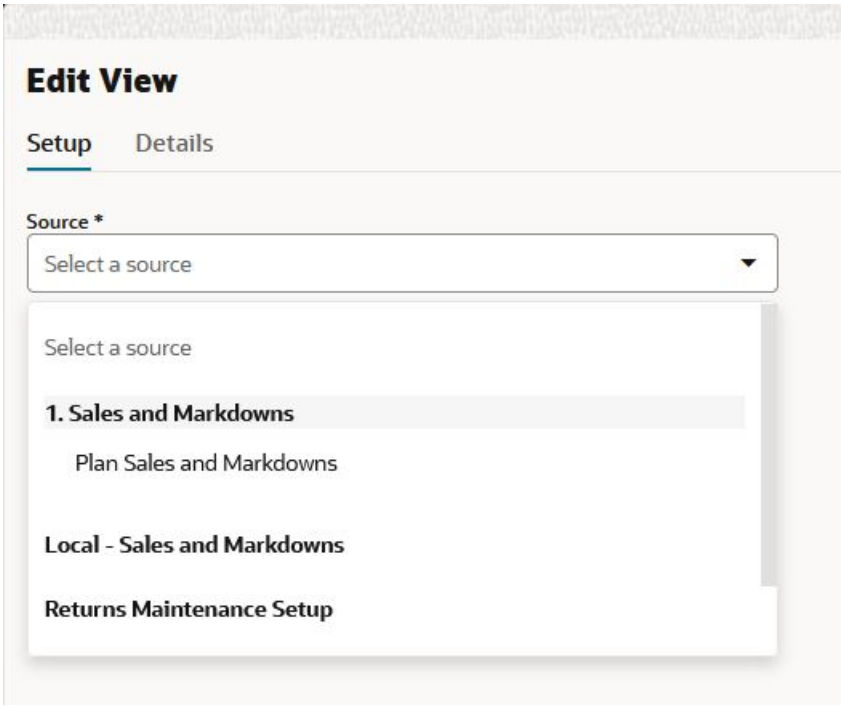
Figure 10-4 Creating a Chart



Product	Wp Sales R	Fcst Sales R	Wp Sales R var Fc...	Ly Sales R	Wp Sales R var Ly...	MP Wp Sales R c...	MP Ly
30018 Short Sleeve Tees	403,062.90	404,005.53	-0.2 %	404,005.53	-0.2 %	8.3 %	
30019 Long Sleeve Tees	398,134.00	346,203.48	15.0 %	346,203.48	15.0 %	8.2 %	
30020 Sleeveless Blouses	428,942.09	288,545.69	48.7 %	288,545.69	48.7 %	8.8 %	
30021 Short Sleeve Blouses	416,248.96	363,536.21	14.5 %	363,536.21	14.5 %	8.6 %	
30022 Long Sleeve Blouses	177,372.69	242,358.05	-26.8 %	242,358.05	-26.8 %	3.6 %	
30023 Tanks and Camisoles	404,240.41	403,854.92	0.1 %	403,854.92	0.1 %	8.3 %	
30024 Sweaters	357,412.75	346,159.81	3.3 %	346,159.81	3.3 %	7.3 %	
30025 Skirts	230,792.89	230,792.89	0.0 %	230,792.89	0.0 %	4.7 %	
30026 Day Dresses	230,505.72	230,505.72	0.0 %	230,505.72	0.0 %	4.7 %	
30027 Casual Dresses	288,169.57	288,169.57	0.0 %	288,169.57	0.0 %	5.9 %	
30028 Accessories	605,820.73	605,820.73	0.0 %	605,820.73	0.0 %	12.5 %	
30033 Shorts	230,280.09	230,280.09	0.0 %	230,280.09	0.0 %	4.7 %	
30034 Denim	692,607.57	692,607.57	0.0 %	692,607.57	0.0 %	14.2 %	
30035 Sweaters	0.00	303,854.57	-100.0 %	303,854.57	-100.0 %	0.0 %	
30036 Trousers	0.00	964,276.00	-100.0 %	964,276.00	-100.0 %	0.0 %	

2. In Edit View, **Select a Source** and select from the existing views. This example uses *1.Sales and Markdowns* as the source. All data that exists in the *1.Sales and Markdowns* view is available in the new chart view being created.

Figure 10-5 Select a Source



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

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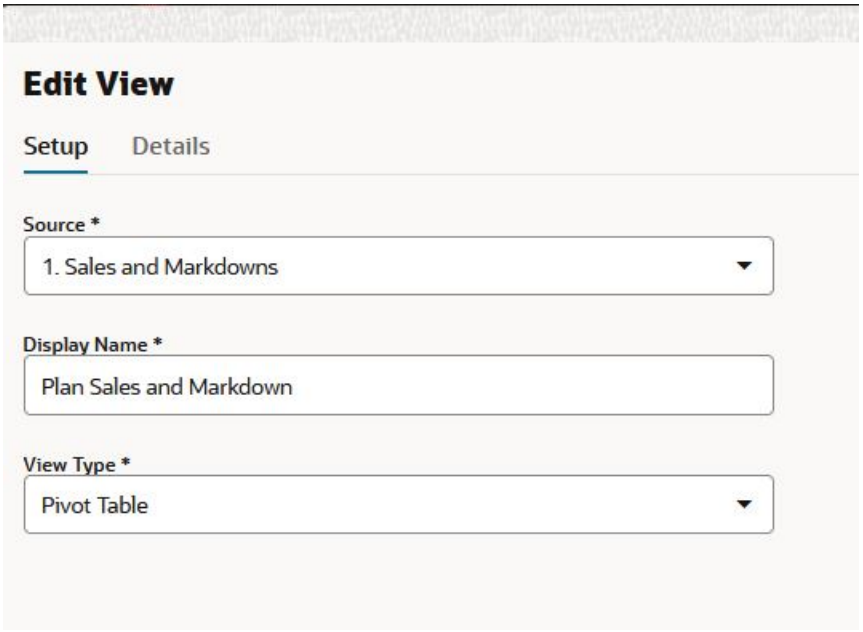
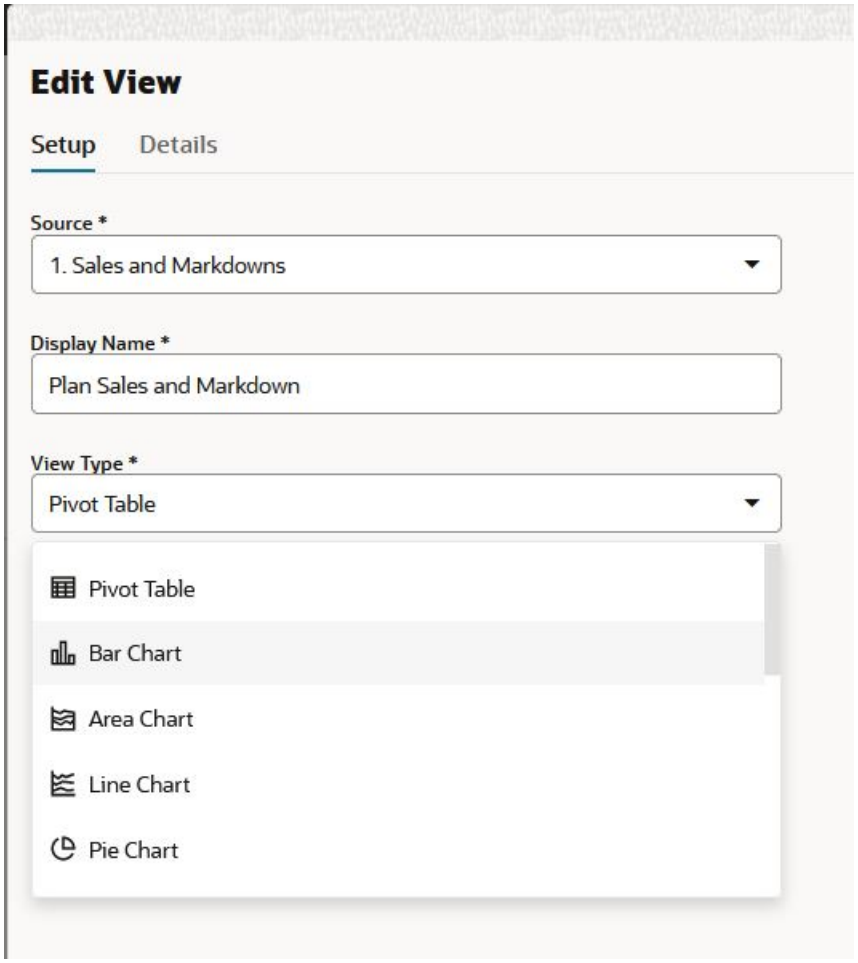
Figure 10-6 New View Name



4. Select the type of chart from the list.

Figure 10-7 Chart Type



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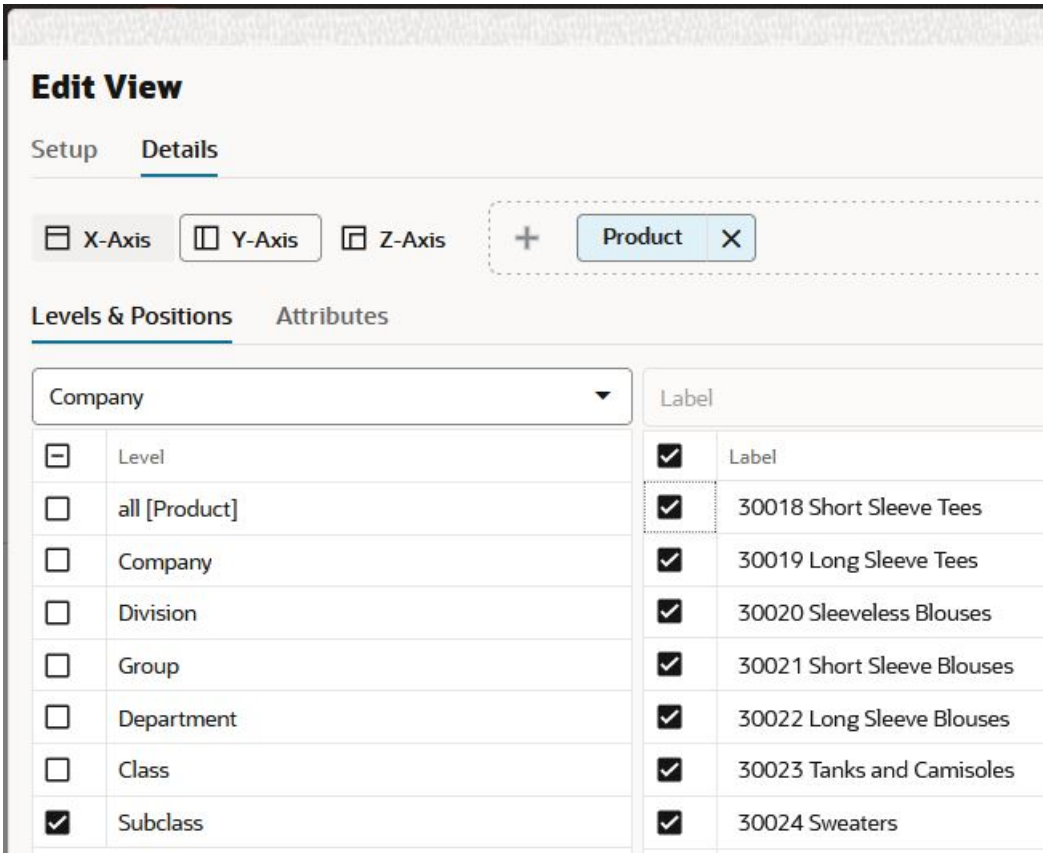
5. Click the **Details** tab to add, remove, or rearrange any levels or positions on the chart and click **OK**.

Figure 10-8 Chart Details



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

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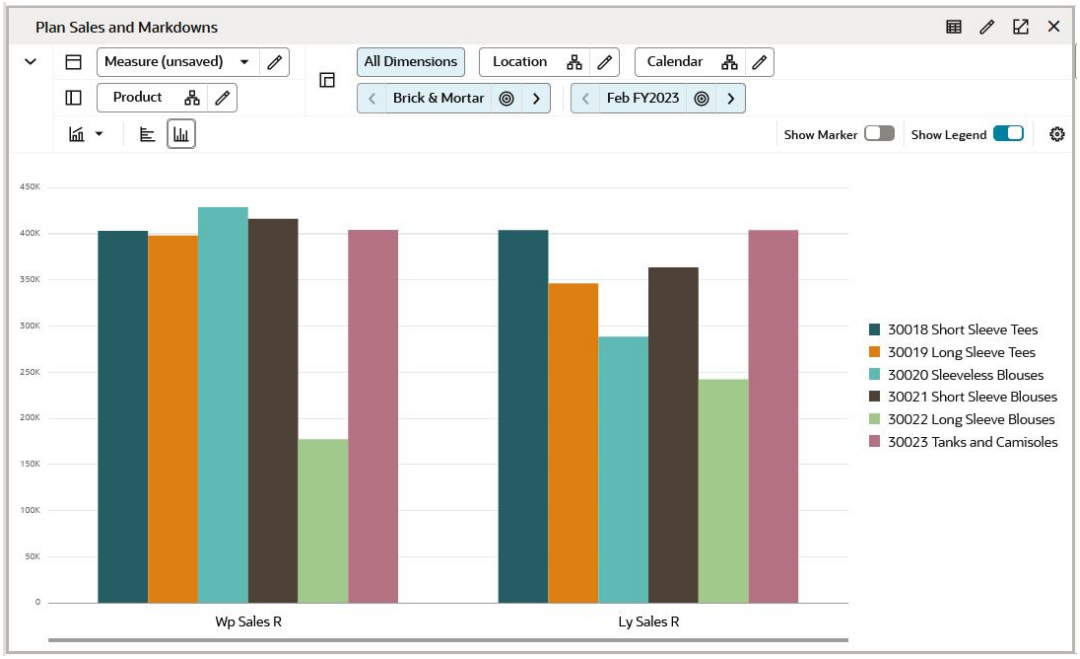
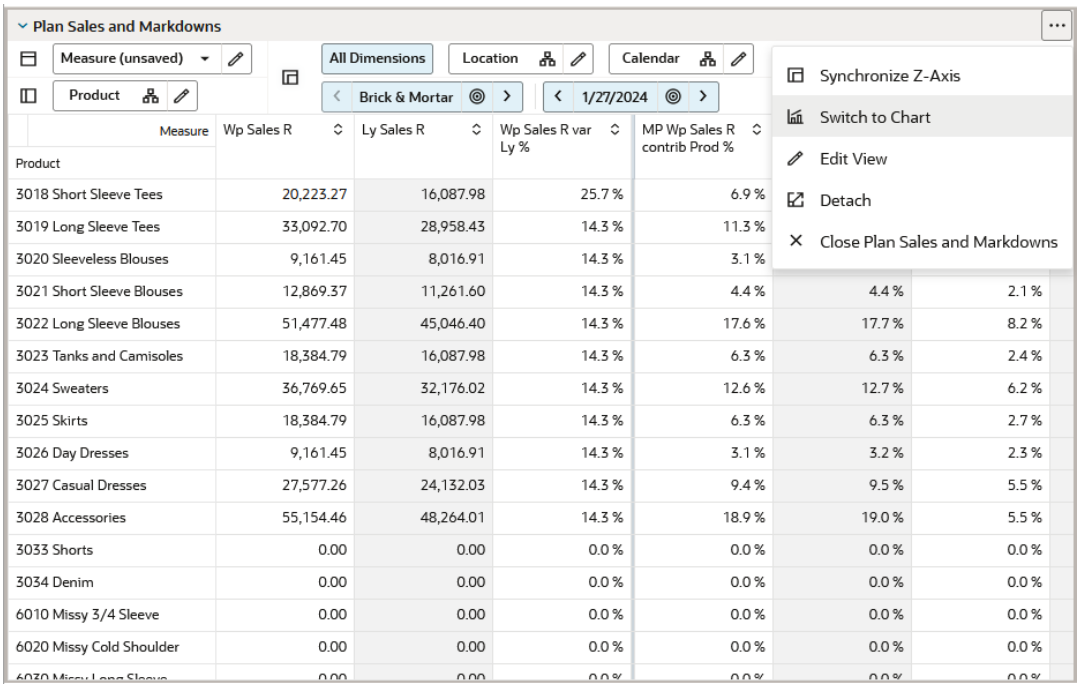
Figure 10-9 Chart View



7. Another way to create charts in the existing tile view is to click the Charts icon (Figure 10-10 on the content area. This option helps you to switch between pivot table and charts with just one click. It allows you to view data in a graph format for analyzing data. You can revert back to the pivot table when you click the Pivot Table icon (Figure 10-11).

Figure 10-10 Switch to Charts Icon



Measure / Product	Wp Sales R	Ly Sales R	Wp Sales R var Ly %	MP Wp Sales R contrib Prod %		
3018 Short Sleeve Tees	20,223.27	16,087.98	25.7 %	6.9 %		
3019 Long Sleeve Tees	33,092.70	28,958.43	14.3 %	11.3 %		
3020 Sleeveless Blouses	9,161.45	8,016.91	14.3 %	3.1 %		
3021 Short Sleeve Blouses	12,869.37	11,261.60	14.3 %	4.4 %	4.4 %	2.1 %
3022 Long Sleeve Blouses	51,477.48	45,046.40	14.3 %	17.6 %	17.7 %	8.2 %
3023 Tanks and Camisoles	18,384.79	16,087.98	14.3 %	6.3 %	6.3 %	2.4 %
3024 Sweaters	36,769.65	32,176.02	14.3 %	12.6 %	12.7 %	6.2 %
3025 Skirts	18,384.79	16,087.98	14.3 %	6.3 %	6.3 %	2.7 %
3026 Day Dresses	9,161.45	8,016.91	14.3 %	3.1 %	3.2 %	2.3 %
3027 Casual Dresses	27,577.26	24,132.03	14.3 %	9.4 %	9.5 %	5.5 %
3028 Accessories	55,154.46	48,264.01	14.3 %	18.9 %	19.0 %	5.5 %
3033 Shorts	0.00	0.00	0.0 %	0.0 %	0.0 %	0.0 %
3034 Denim	0.00	0.00	0.0 %	0.0 %	0.0 %	0.0 %
6010 Missy 3/4 Sleeve	0.00	0.00	0.0 %	0.0 %	0.0 %	0.0 %
6020 Missy Cold Shoulder	0.00	0.00	0.0 %	0.0 %	0.0 %	0.0 %

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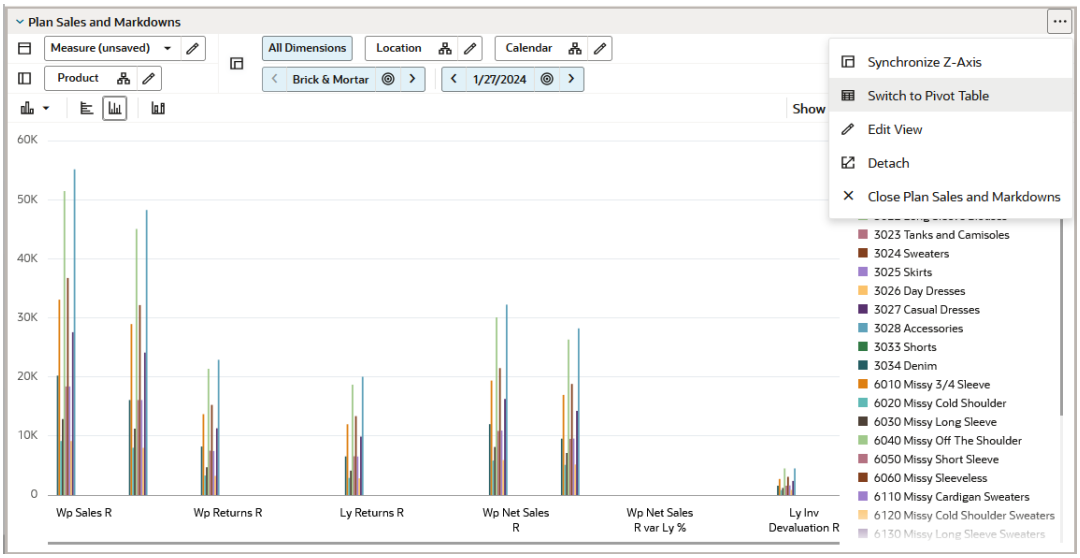
Figure 10-11 Switch to Pivot Table Icon



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 10-12 Data Mapping in Charts

Key for Figure 10-12:

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)

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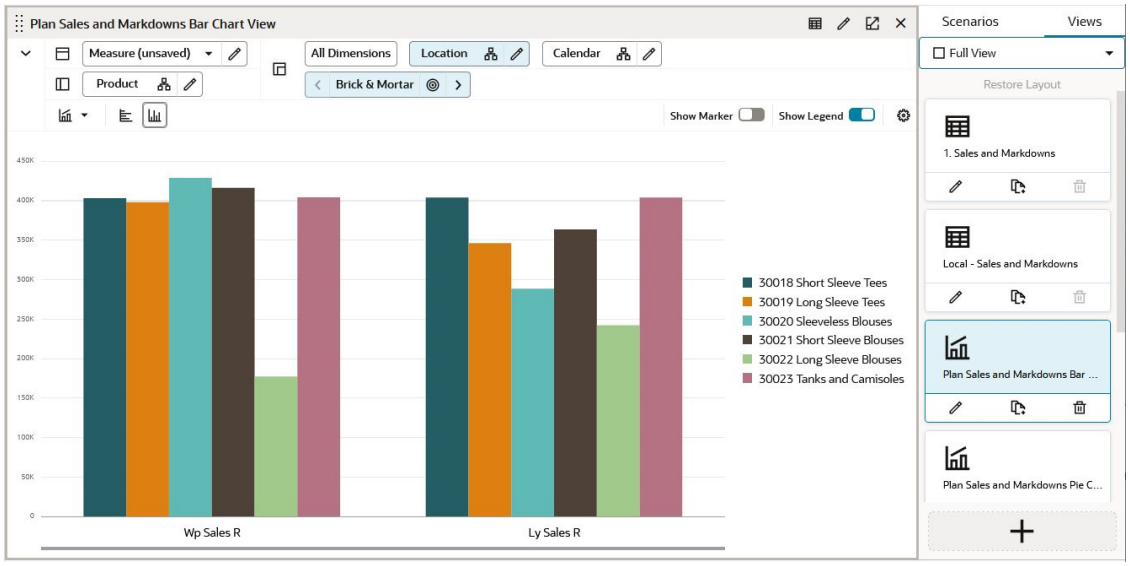
Customizing a Chart

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 Editing Views..

Figure 10-13 Customize a Chart



To change the orientation of the x-axis labels, an administrator can set the orientation in self-service configuration feature. The orientation of the chart can be set either as horizontal or auto-orientation to manage the space of the chart view. For more information, see the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

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:

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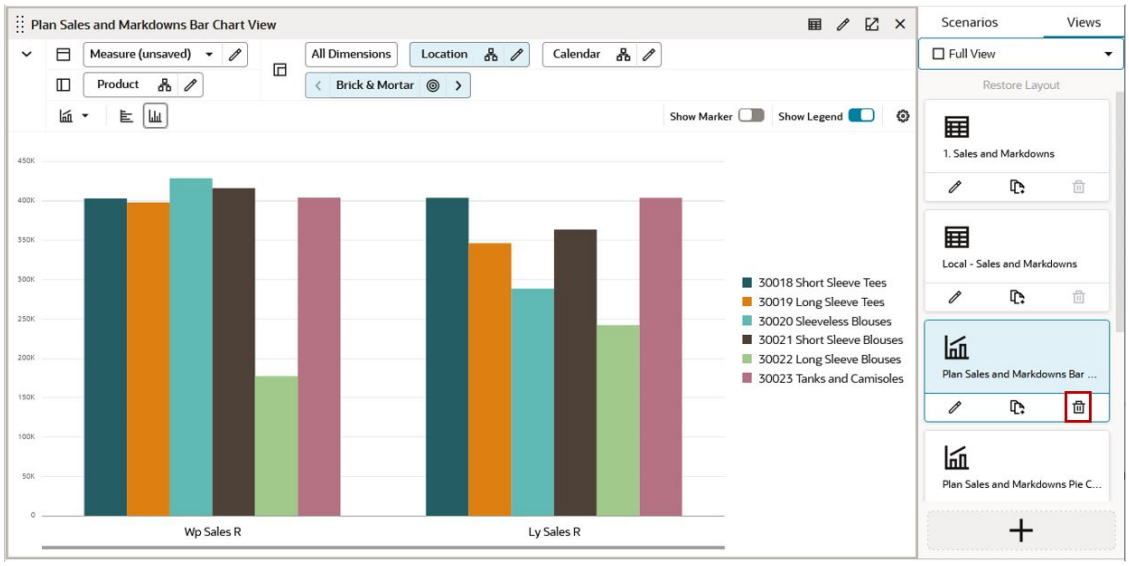
Figure 10-14 Deleting a Chart

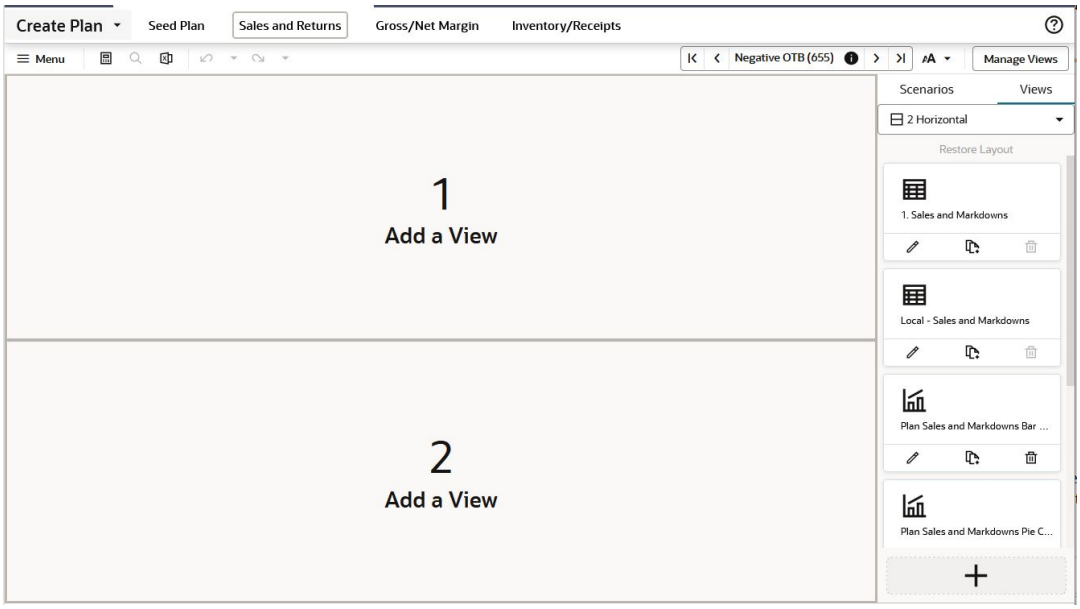


Synchronize the Z-axis with Charts

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 10-15 Select View Layout



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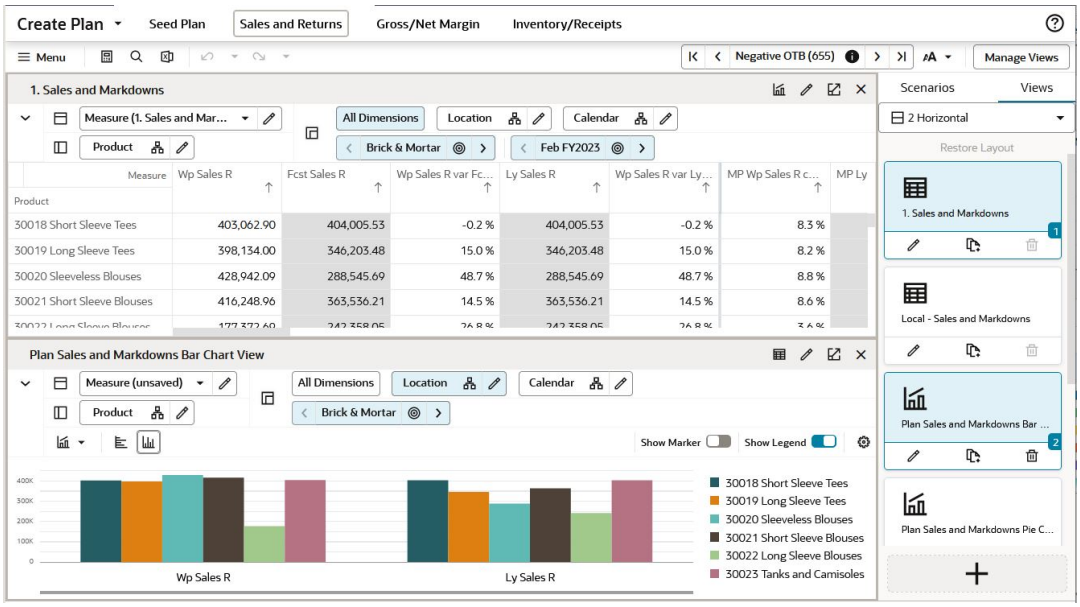
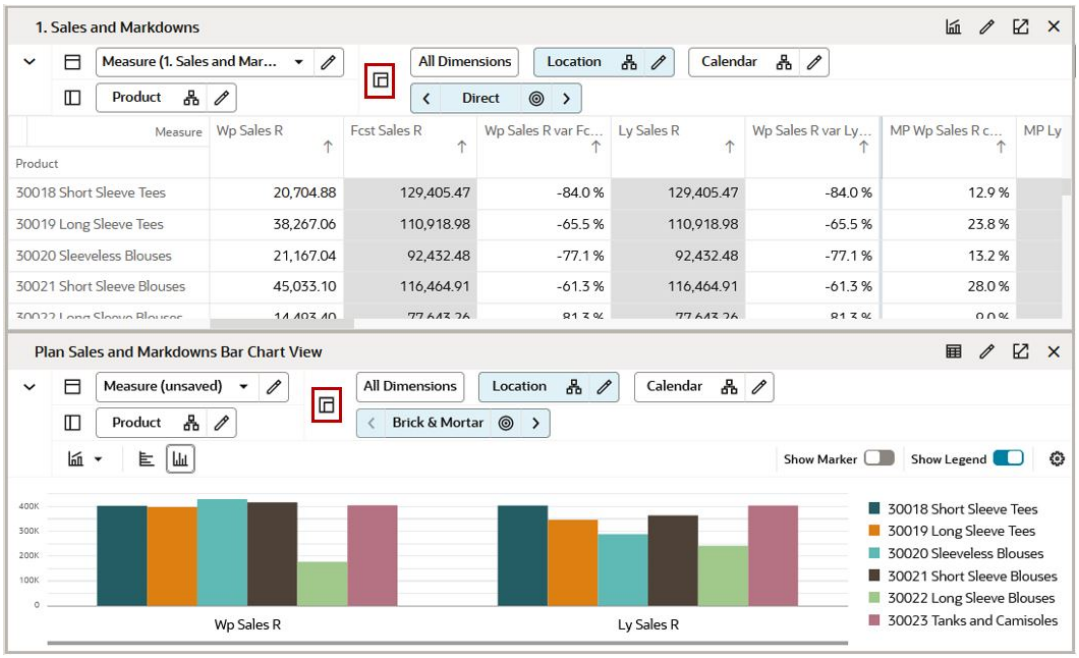
2. Add at least two views to a layout by dragging the View Tiles from the View Management Drawer. In this example, the *1. Sales and Markdowns* tile and the *Plan Sales and Markdowns Bar Chart View* tile have been dragged into the layout.

Figure 10-16 Add Chart View to Layout



3. Click **Synchronize Z-axis** to activate it.

Figure 10-17 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.

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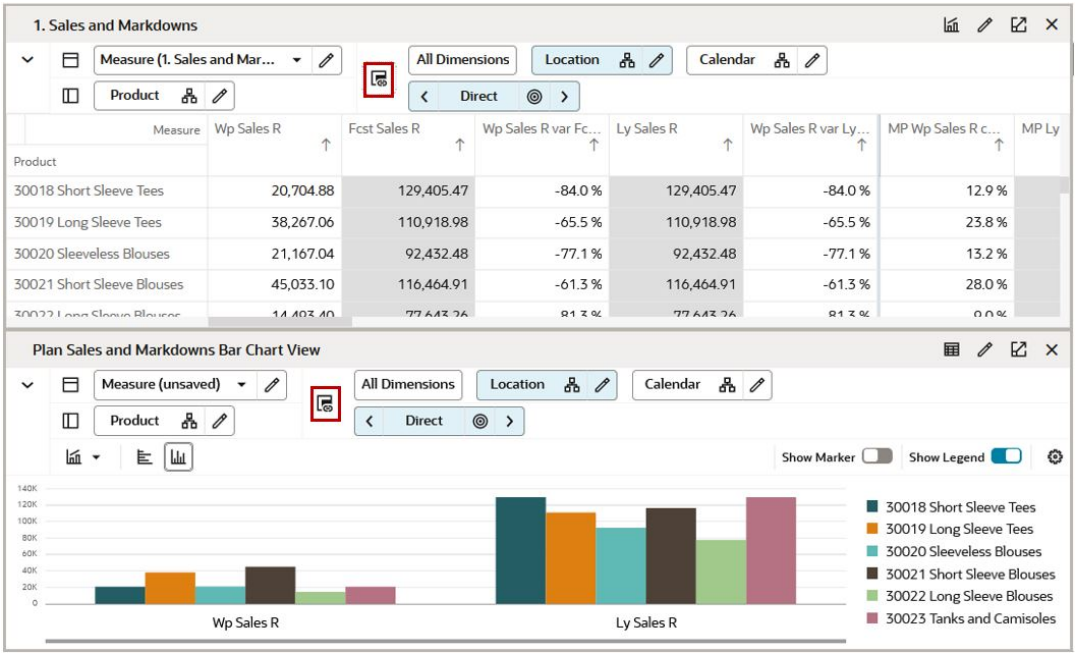
Figure 10-18 Synchronize Z-axis



Edit Data Values in the Chart Views

The data in the pivot table can be edited from charts views. It can be helpful in making changes to data without navigating to pivot table. Changing data value in the chart view gives a quick look at the graph trend and planner can make faster decisions. You can edit charts by two ways:

- Dragging the Chart Line
- Using the Edit Window to Edit Charts

Dragging the Chart Line

Perform the following steps to edit a chart by Dragging the chart line:

1. Change the view to the chart view. When you bring the cursor to the point of intersection, the marker is highlighted and the cursor changes to pointer finger.

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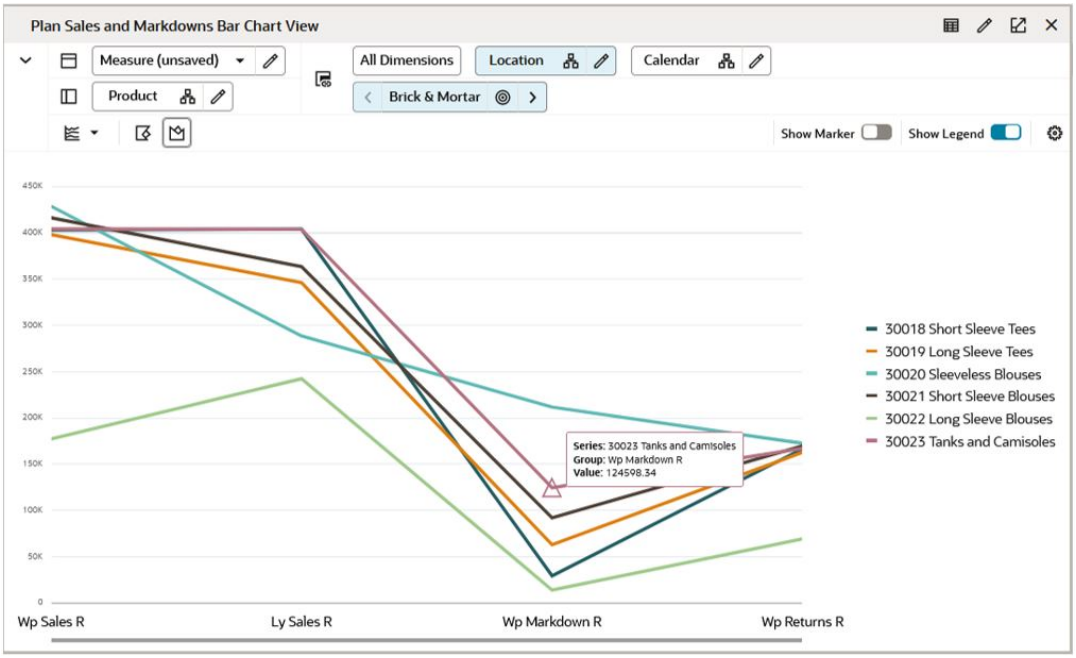
Figure 10-19 Chart View - Marker Point Highlight



2. Double-click and then hold and drag the marker point where the data change is required. To increase the value of data, drag upwards and to decrease drag the point of intersection downwards on the chart layout.

   When you move the point of intersection, you can see the value of the current selection changing on the chart tool bar.

Figure 10-20 Drag the Chart Line Upward to Increase the Data Value

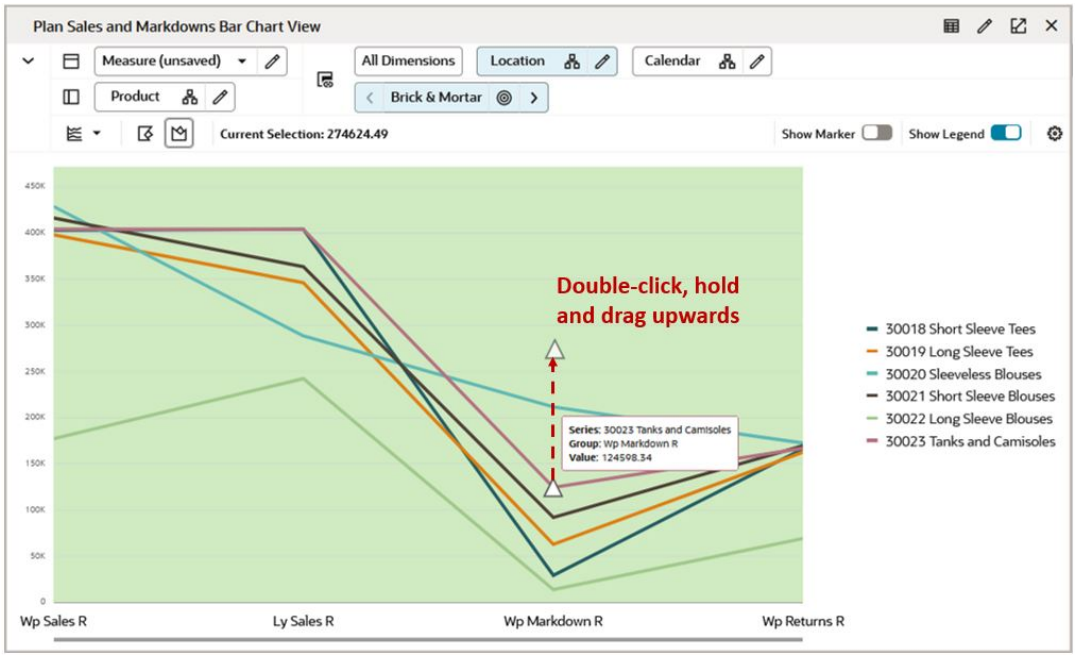


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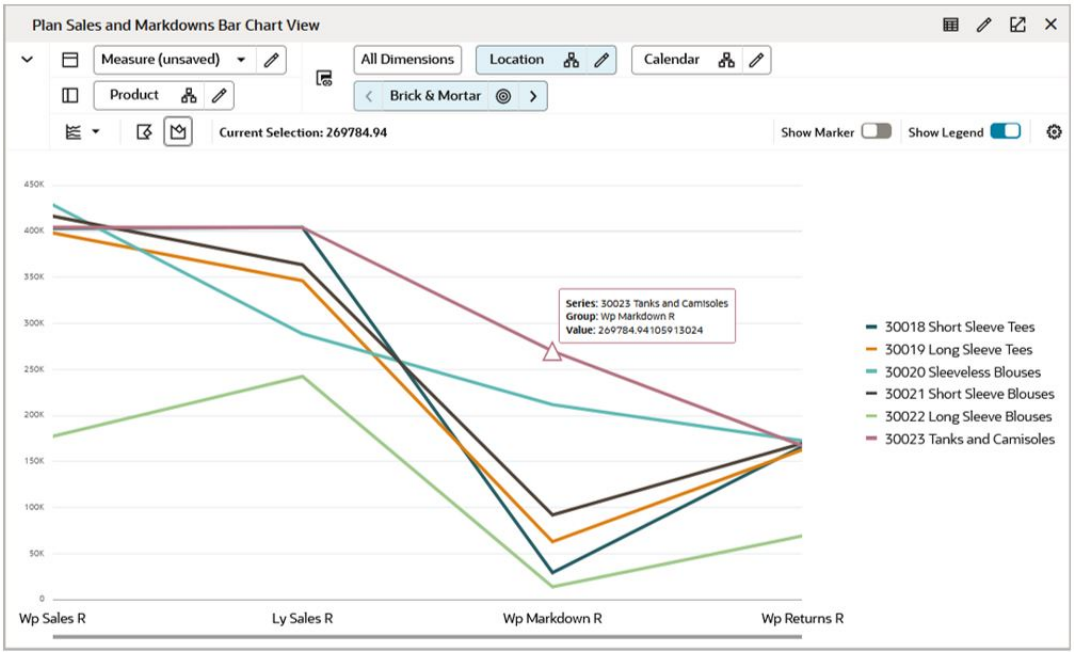
Figure 10-21 Edit Result after Dragging a Chart Line



> **Note**
>
> When you edit the numeric value in the chart view, the value may display in decimal points but in pivot table the value is rounded off.

Using the Edit Window to Edit Charts

Perform the following steps to edit charts using the Edit Window:

1. Change your view to the chart view. Bring the cursor to the point of intersection, the marker ID is highlighted and the cursor changes to pointer finger.
2. Click the point of intersection where the data change is required and an Edit Chart dialog box opens. The edit chart dialog box shows the description of Series, Group and text input box for Value.

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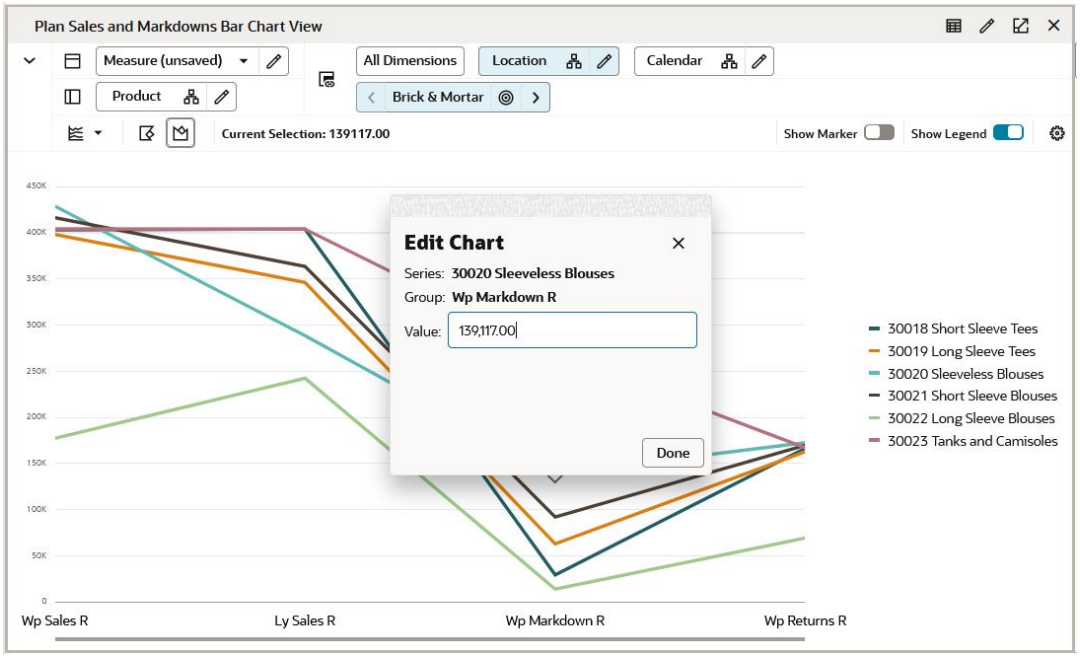
Figure 10-22 Chart View - Edit Chart Dialog Box



3. Enter the data value in the Value input box and click **Done** to accept. To cancel, click **X** and the value is not updated.

Figure 10-23 Edit Value in the Dialog Box

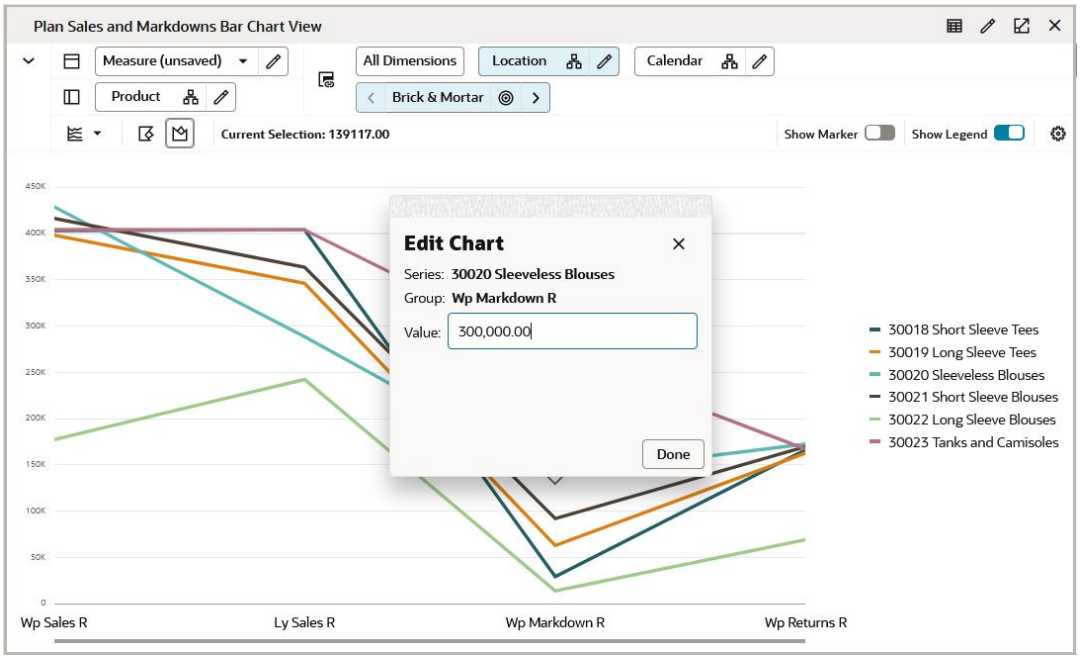


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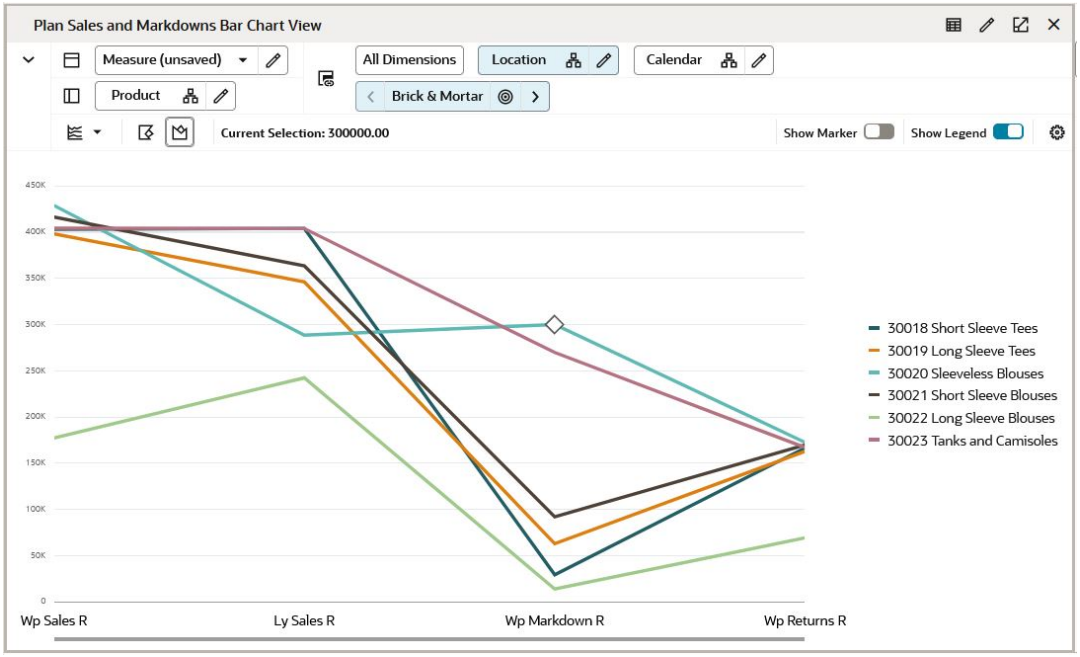
Figure 10-24 Edit Result in the Chart View



> **Note**
>
> When you enter a decimal value in the Edit dialog box, the value is rounded off in the pivot table.

Points to Remember

Consider the following points when you edit data values in the Chart Views:

- The data edited in chart is reflected in the pivot table.
- You can edit only the bar graph, line, area, line and area, combination charts, bubble, and scatter charts.
- **Edit in Scatter chart**—Drag and drop functionality enables to edit both the measure which are plotted at the x-axis and y-axis by dragging the point of intersection vertically and horizontally. The edit of value can also be made by using Edit Window functionality.
- **Edit in Bubble chart**—Drag and drop functionality enables to edit two measure which are plotted at x-axis and y-axis of chart. The third measure representing the size of bubble can be edited using Edit window functionality. You can edit the value of all three measures by within the Edit Window.
- You can use Undo, Redo function in chart view as well.
- You can edit chart in Horizontal orientation.
- You can right- click on the point of intersection to access the Edit chart option from chart context menu.
- You can edit only numeric values in graph. SHS, pick list, date, date time, Boolean measures will not be edited from chart.

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- You cannot edit the read-only, protected and or locked data values from chart view. When you click the locked, protected or read only data point in chart view, and alert message is shown. The value cannot be edited as it is read-only, protected, or locked.

Chart Types

The following chart types are available:

Multi Group Charts

- Bar Chart
- Area Chart
- Line Chart
- Line with Area Chart
- Polar Chart
- Stacked Area Chart
- Scatter Chart
- Bubble Chart

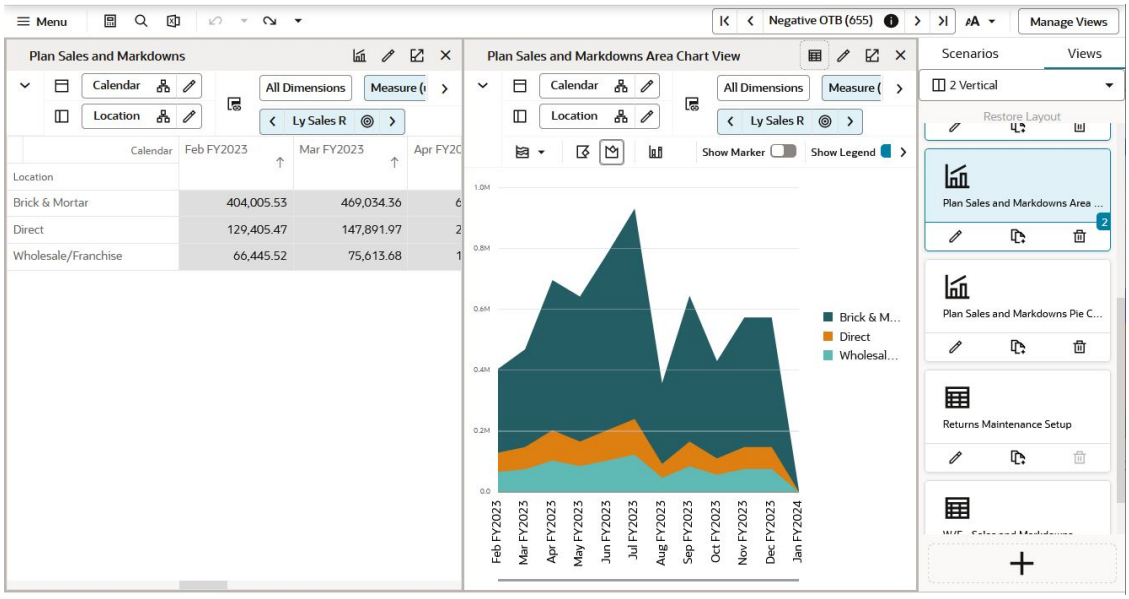
Single Group Charts

- 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 10-25 plots WP Sales R values for Missy Short Sleeve Sweaters across 10 different locations over time (three months).

Figure 10-25 Multi-group Chart



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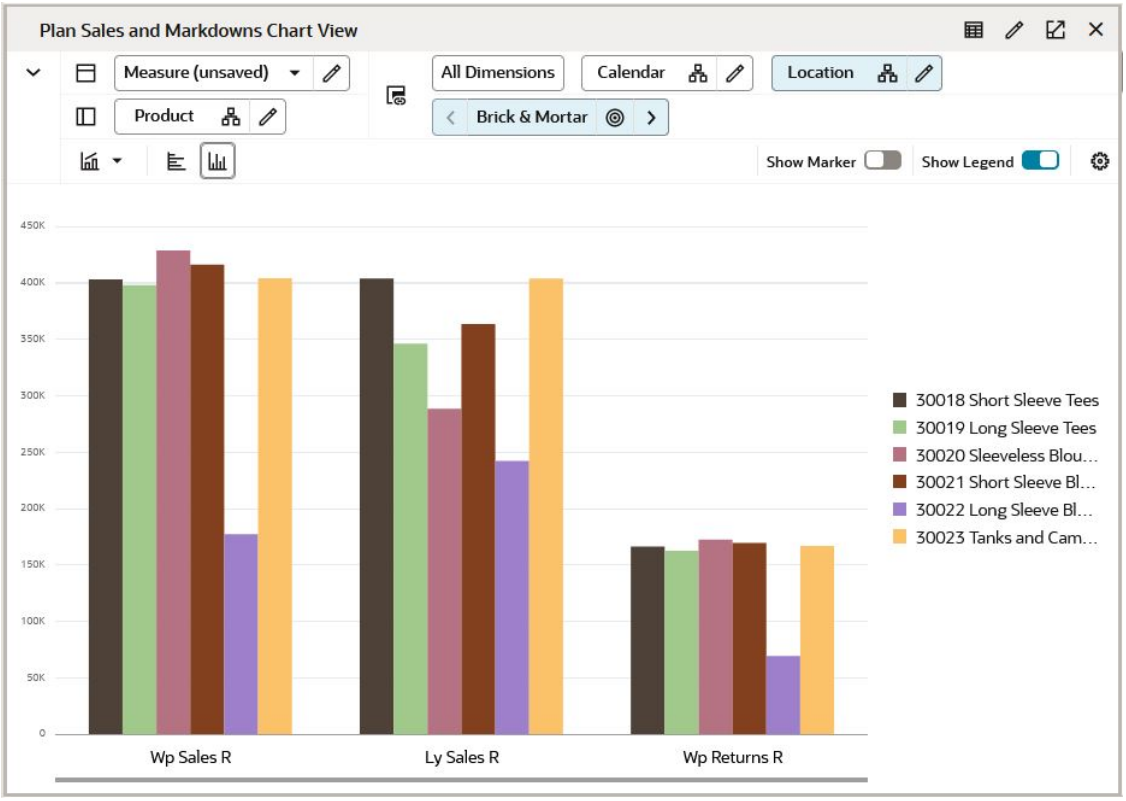
Bar Chart

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 10-26 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.

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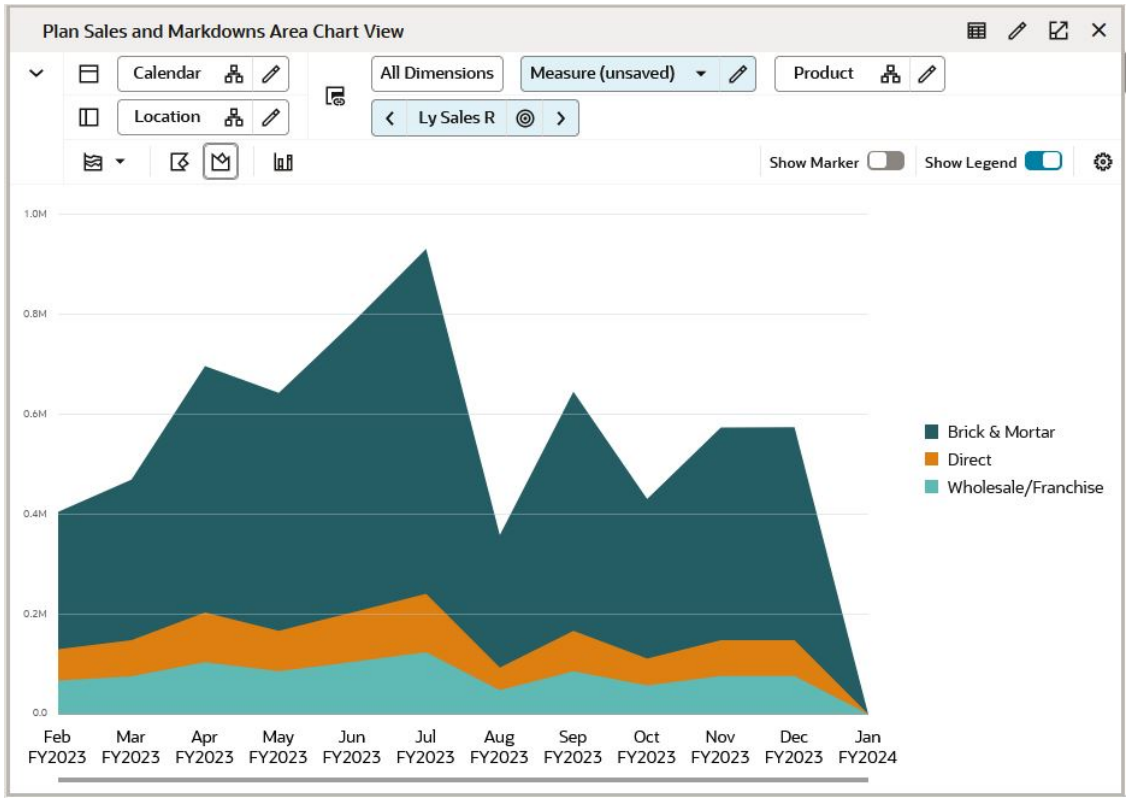
Figure 10-27 Area Chart



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.

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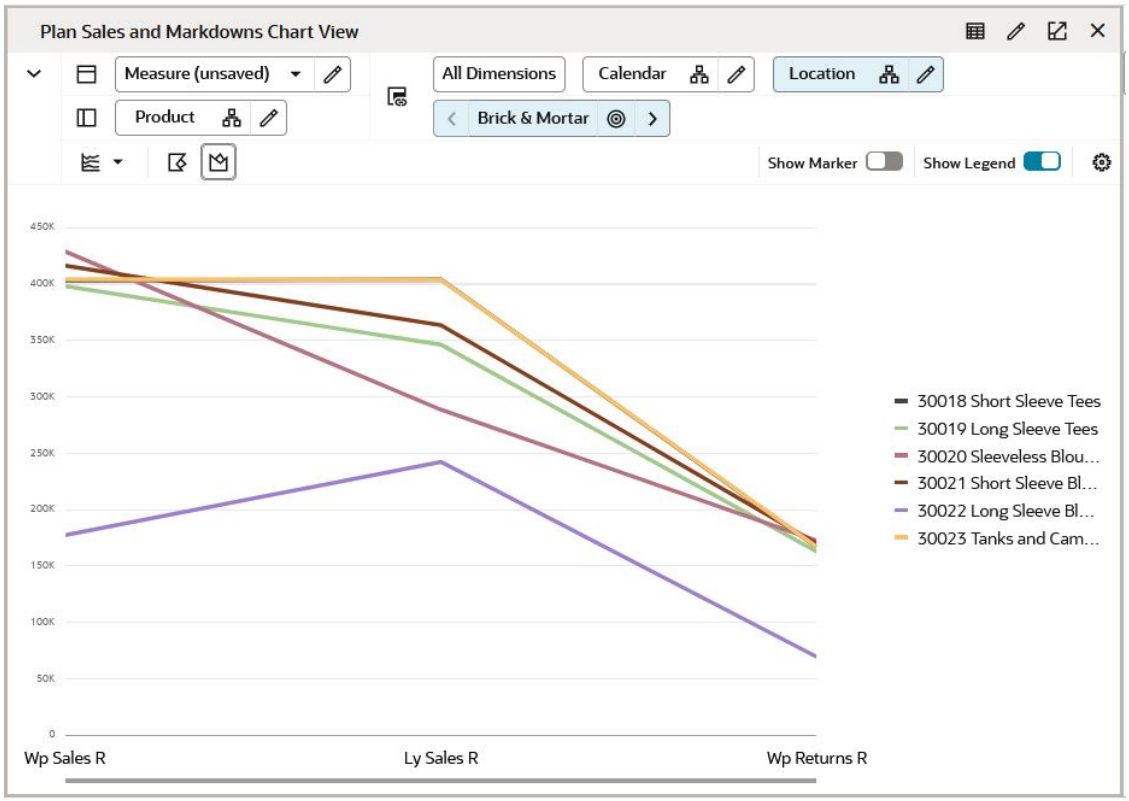
Figure 10-28 Line Chart



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.

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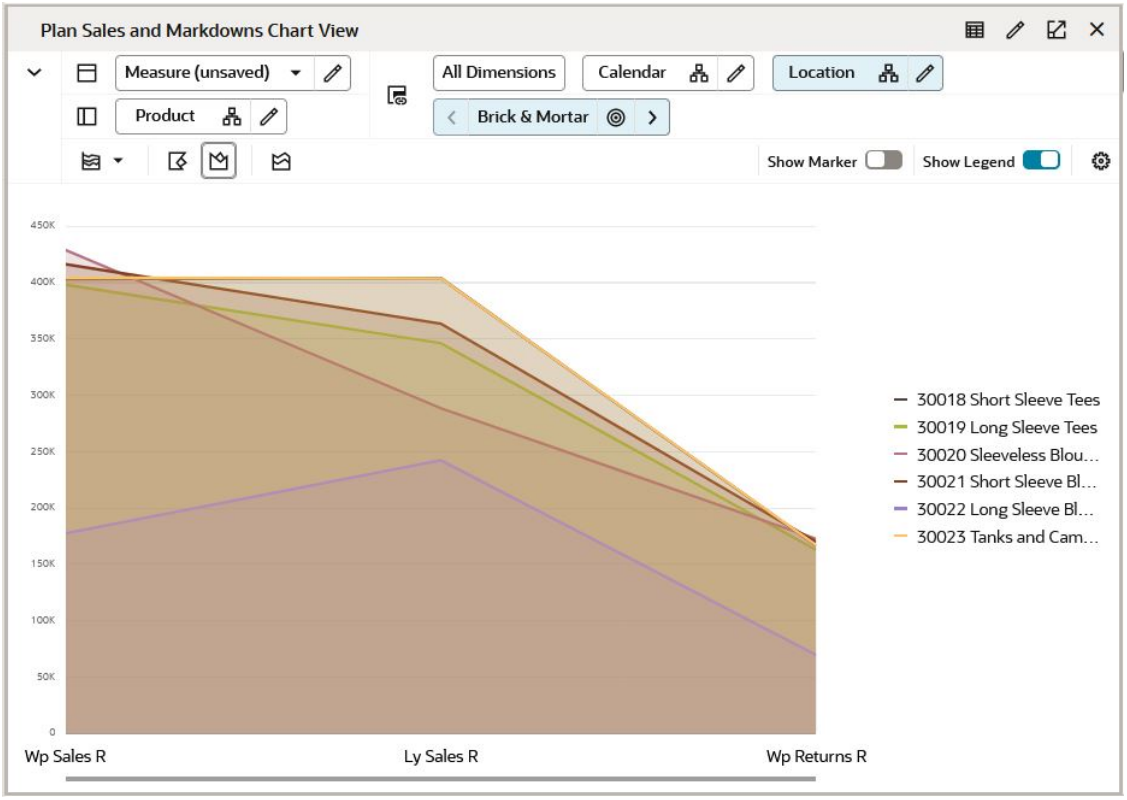
Figure 10-29 Line with Area Chart



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.

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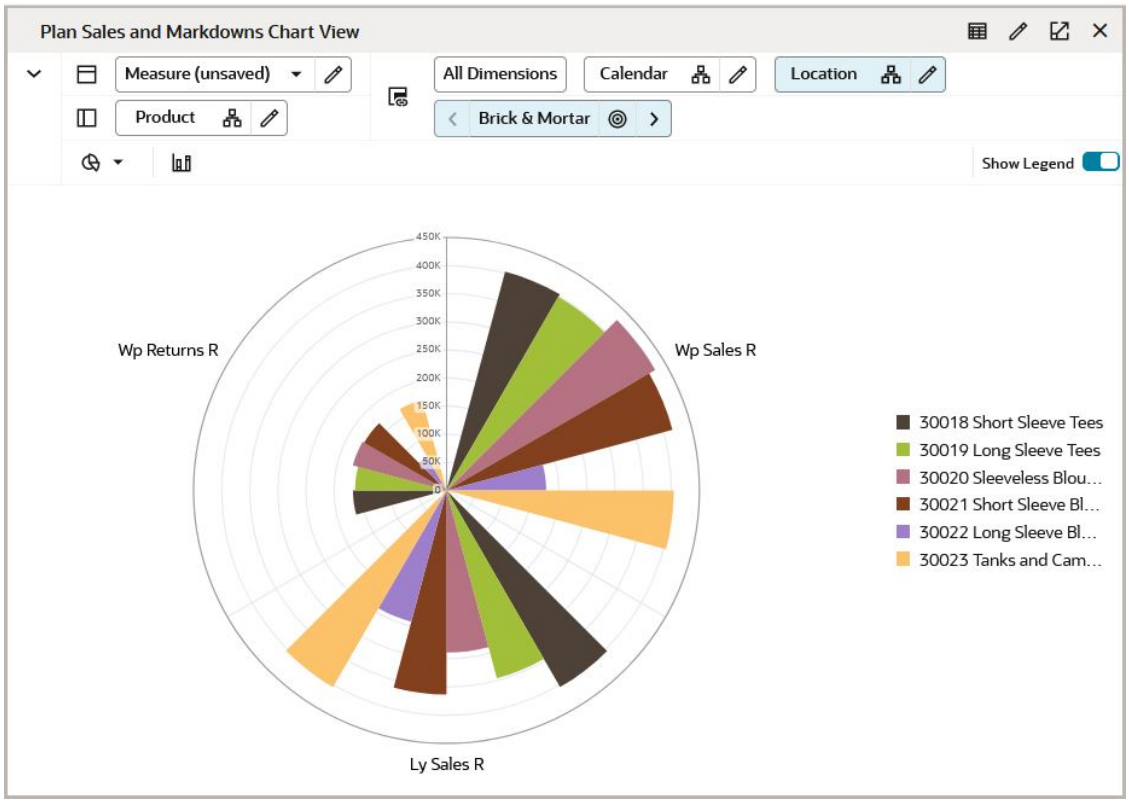
Figure 10-30 Polar Chart



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.

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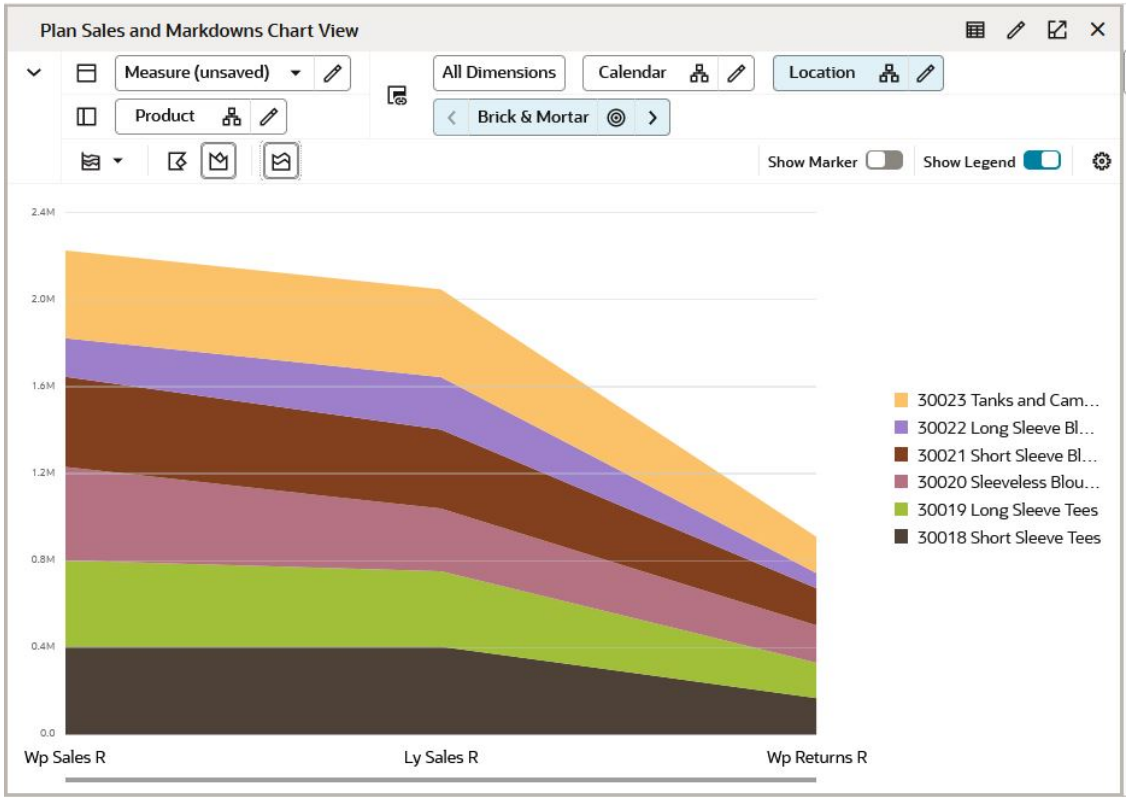
Figure 10-31 Stacked Area Chart



Scatter Chart

A Scatter chart displays two variable for a set of data which helps in comparison of data and understand the relationship between two variables. Usually the independent variable is plotted along the horizontal axis (x-axis) and the dependent variable is plotted on the vertical axis (y-axis). The scatter chart has a different view as scatter chart needs two measure values to display the chart.

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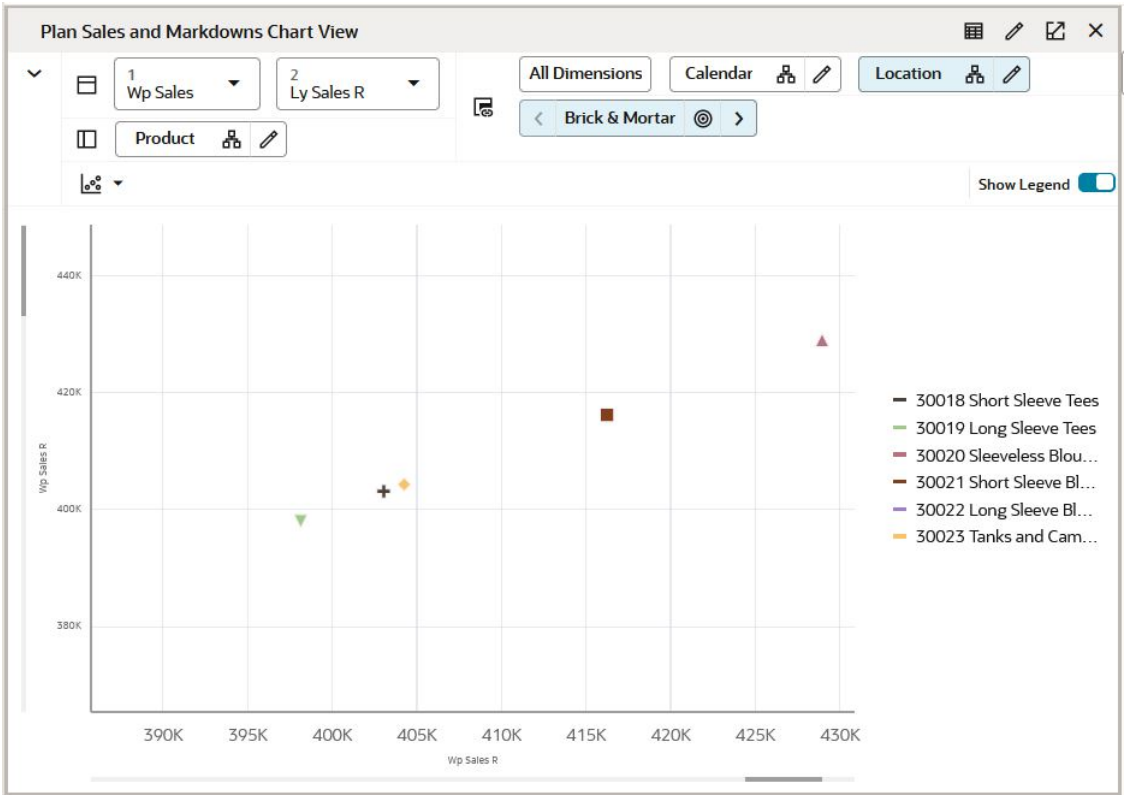
Figure 10-32 Scatter Chart



Perform the following steps to plot scatter chart:

1. Select the chart type **Scatter Chart** from the chart drop-down list in Edit view.

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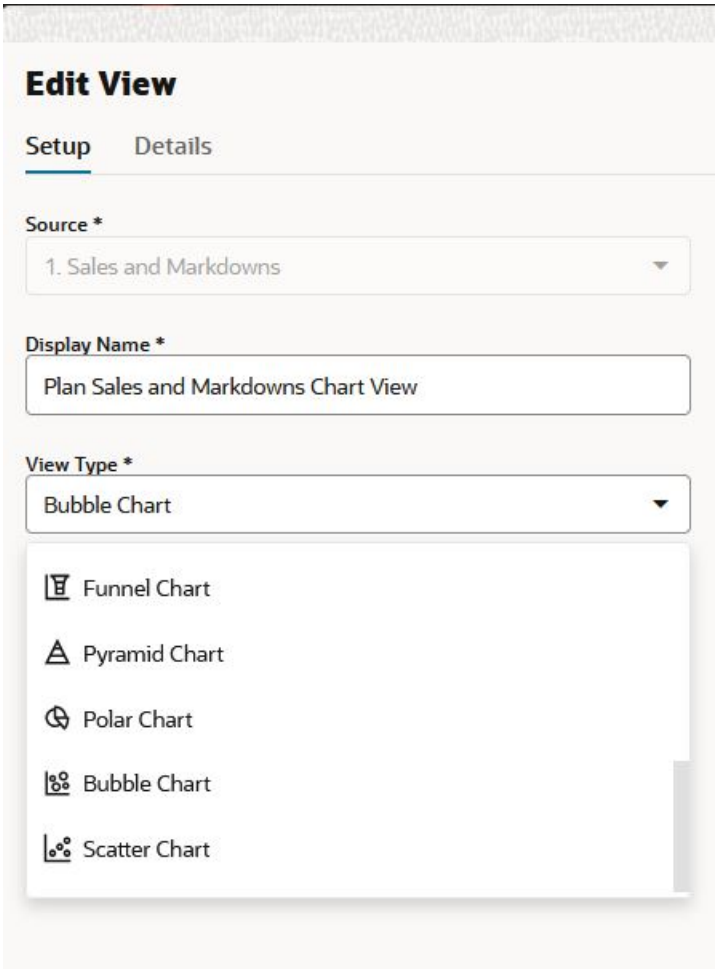
Figure 10-33 Edit View Scatter Chart Type



2. To plot a scatter chart, bring the Measure dimension to X-axis in the workspace view. In case the measure dimension is in different axis then a message appears on the chart area to move the measure dimension to X-axis.

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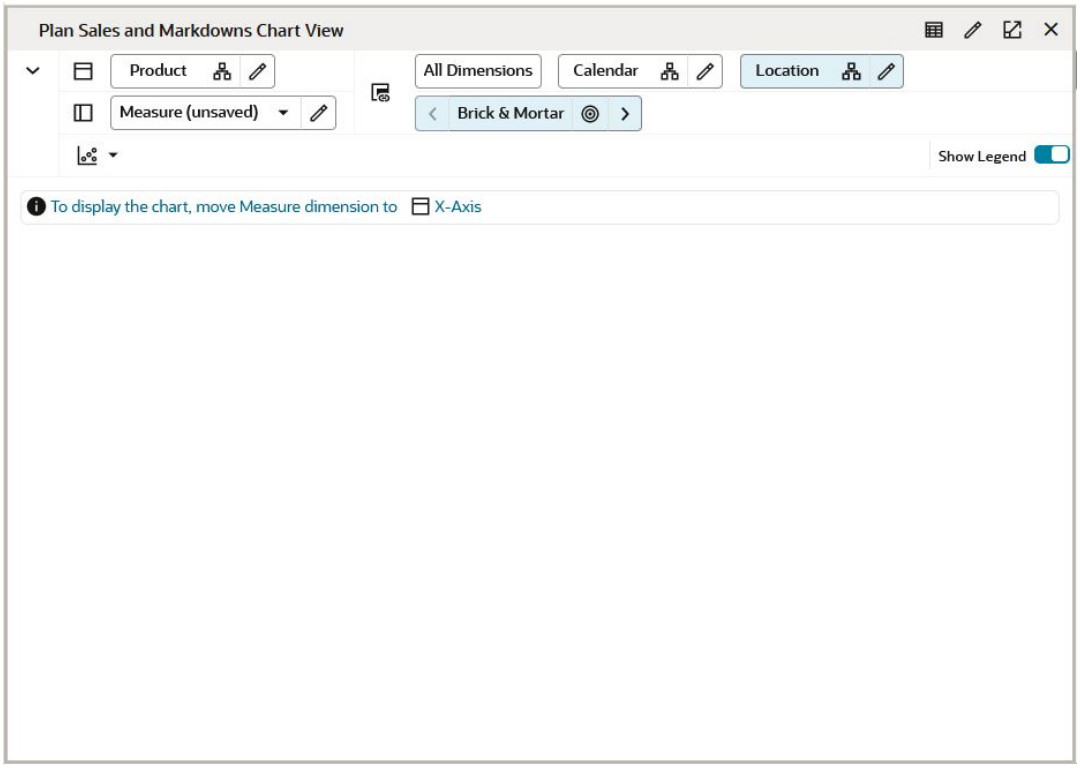
Figure 10-34 Measure on the X-axis



3. Select two measures for which you need to plot the scatter chart using the drop-down list 1 and the drop-down list 2. Measure 1 is the plot at y-axis on the chart and Measure 2 is plot at x-axis on the chart.

Figure 10-35 Scatter Chart Measure Drop-down List

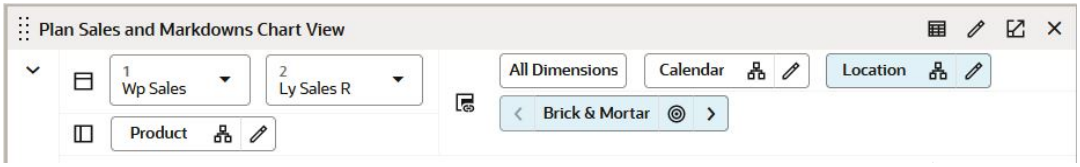


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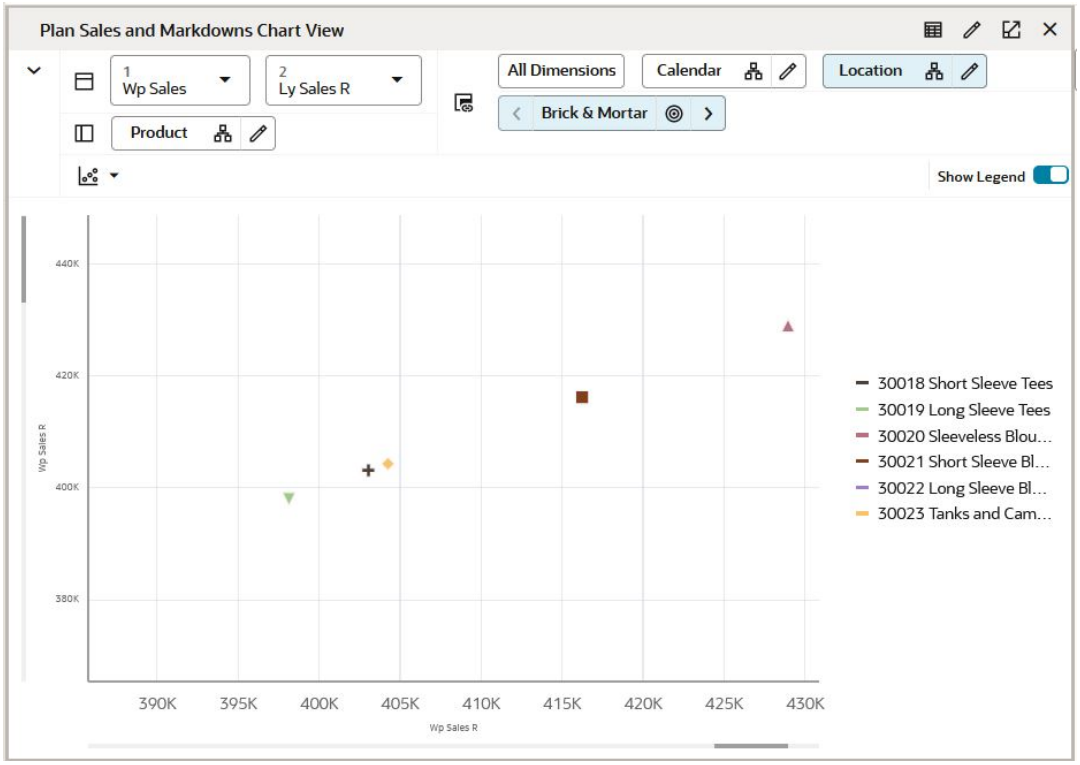
Figure 10-36 Scatter Chart



Bubble Chart

A Bubble chart is a multi-variable graph where three variables of the data display as bubbles in the chart. Two variables are plotted through the x-axis and y-axis. The third variable is represented by the size of the bubble. You can use a Bubble chart to compare and show the relationship between categorized bubbles by the use of positioning and proportions or size of bubbles.

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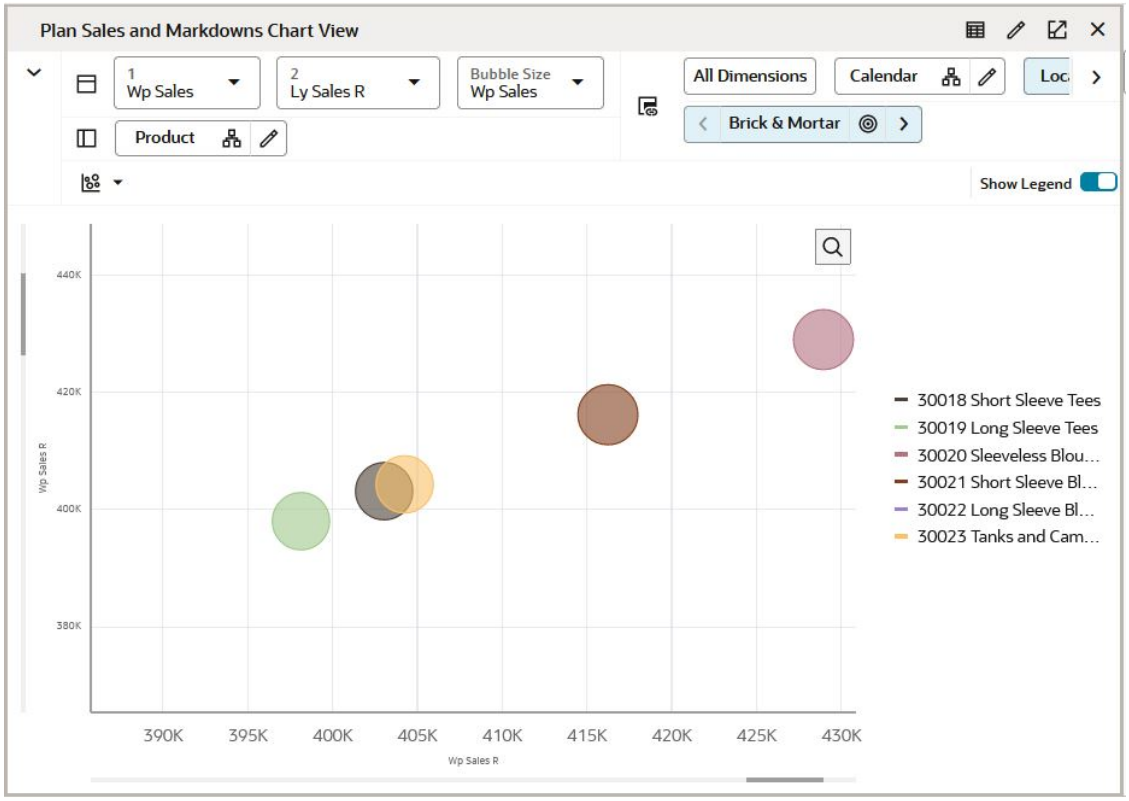
Figure 10-37 Bubble Chart



Perform the following steps to plot a bubble chart:

1. Select the chart type Bubble Chart from the chart drop-down list in Edit view.

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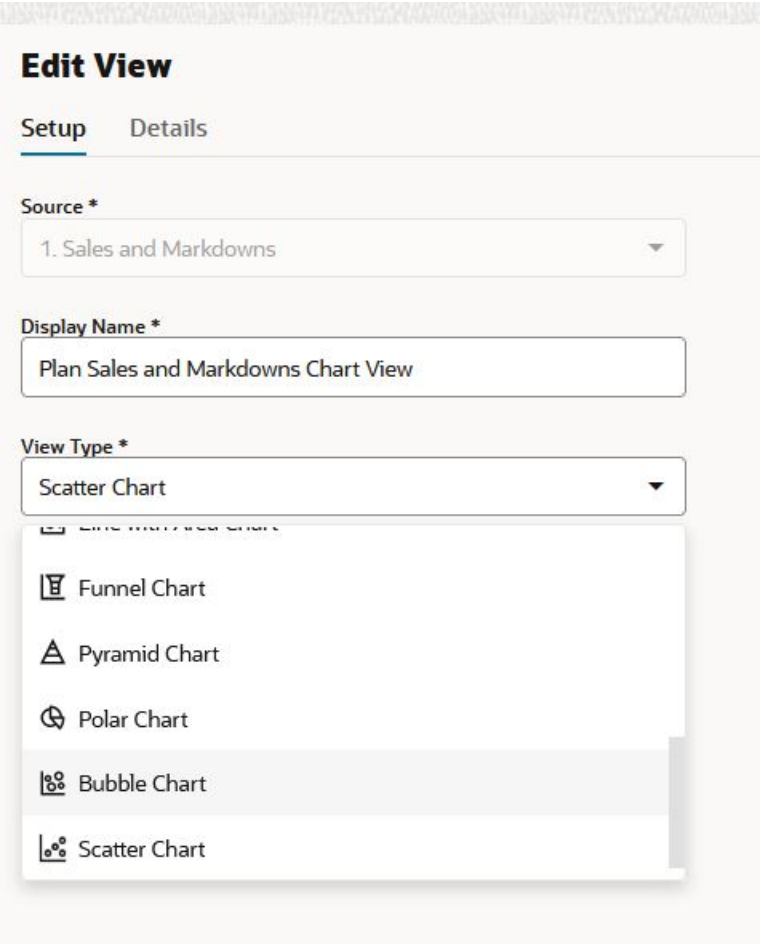
Figure 10-38 Edit View Bubble Chart Type



2. To plot a bubble chart, bring the Measure dimension to the X-axis in the workspace view. In case the measure dimension is in a different axis then a message appears on the chart area to move the measure dimension to X-axis. The Bubble size will plot size of the bubble.

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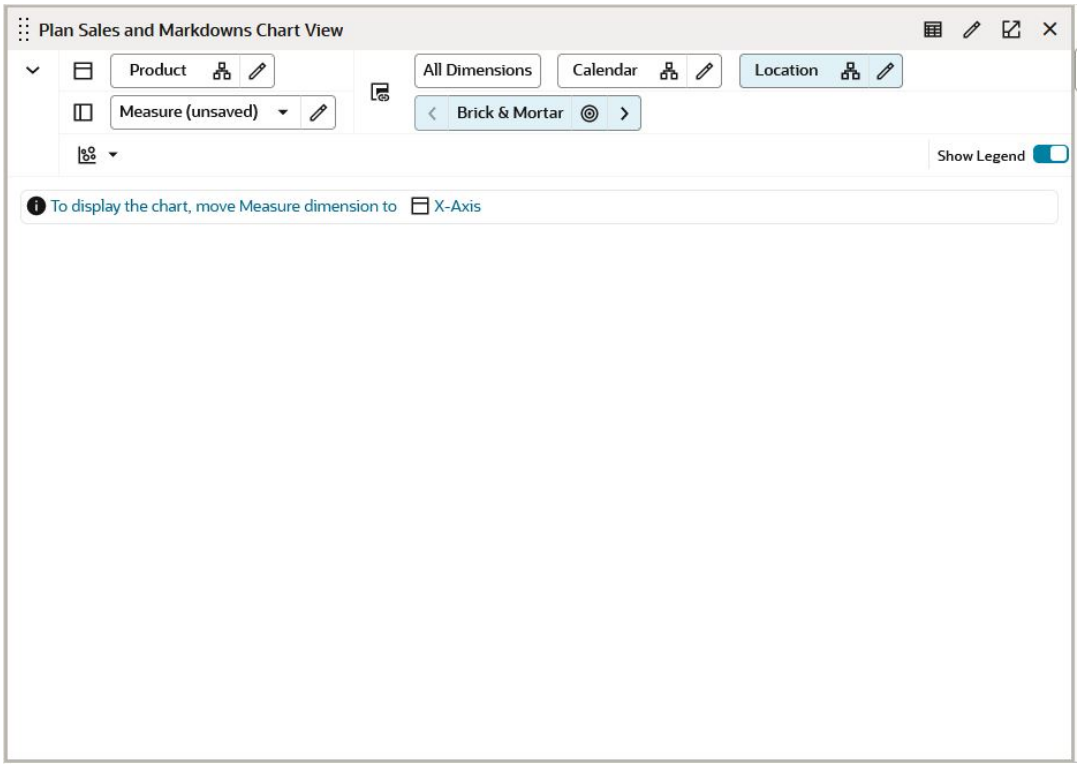
Figure 10-39 Measure on the X-axis



3. Select three measures for which you need to plot the bubble chart using the drop-down list 1, the drop-down list 2 and the Bubble Size drop-down list. Measure 1 is the plot at y-axis on the chart and Measure 2 is plot at x-axis on the chart. The Bubble Size plots size of the bubble.

Figure 10-40 Bubble Chart Measure Drop-down List

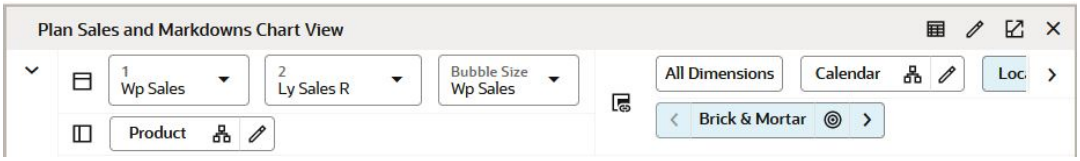


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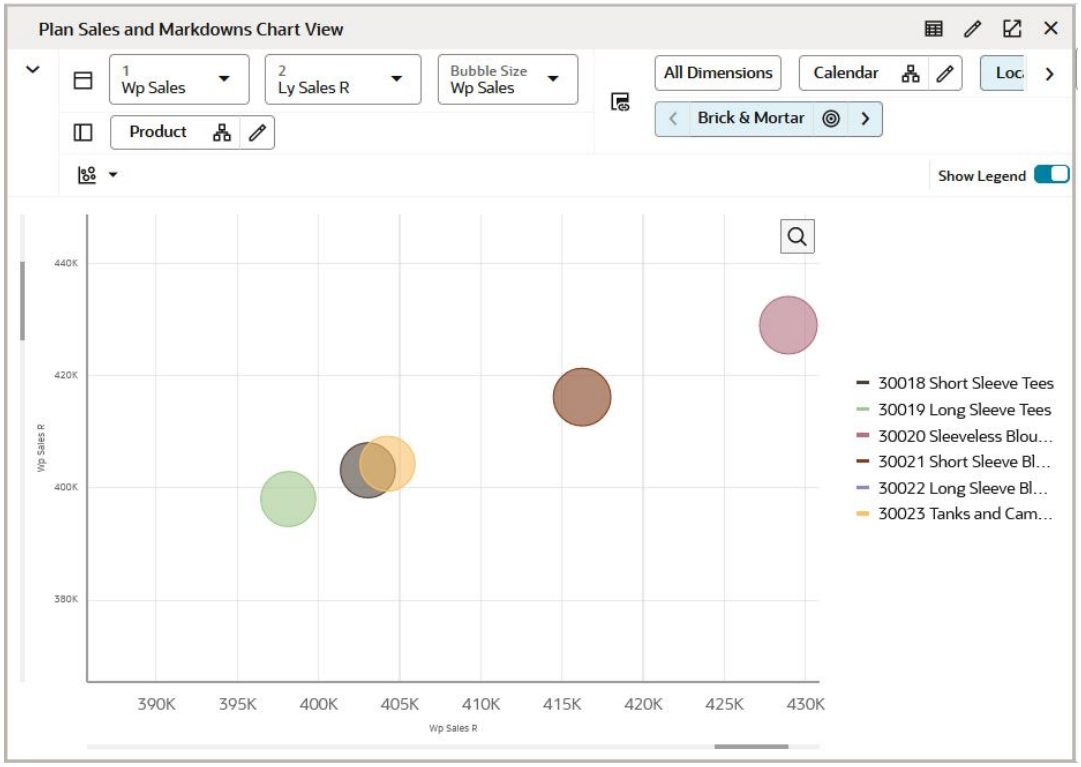
Figure 10-41 Bubble Chart



Custom Charts

Custom charts enable you to create dual y-axis charts, combination charts and Boolean charts. You can select the custom chart option from chart menu drop down. The custom chart option displays the setting option. From chart setting option you can select the marker symbol, color, chart type/style, axis. To enable custom menu chart, place the measure tile on y-axis.

Dual Y-axis Chart

The Dual Y-axis chart allows you to set summaries or plot two y-axis variables. Example you can plot number of units on one axis and gross margin on another axis. Dual y-axis chart helps in presenting plenty of information in the limited space present on the screen and allows you to understand the trend. Using dual y-axis chart, you can easily validate / invalidate relations between two variable with different scale of measurement. To create dual y-axis chart, Place the measure tile on y-axis, select the custom chart option from chart drop down. Click **Setting** to see a dialog box with list of measures plotted on charts. To display the measure on second axis, change the Axis selection from drop-down to Top Axis and click **OK**. Your measure is plotted on top with a second y-axis for you to compare the data.

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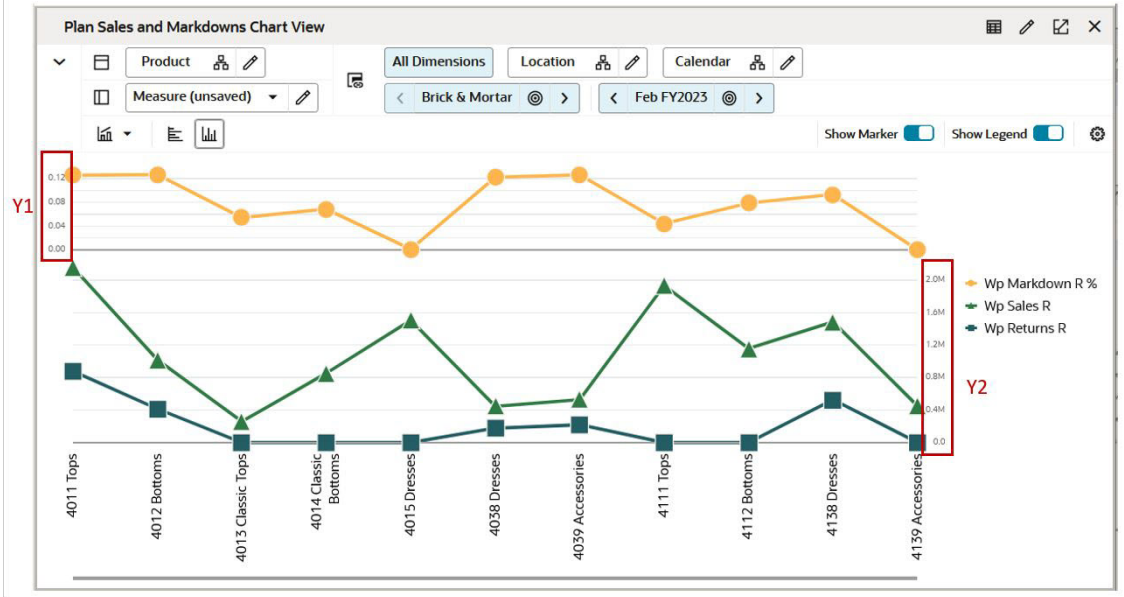
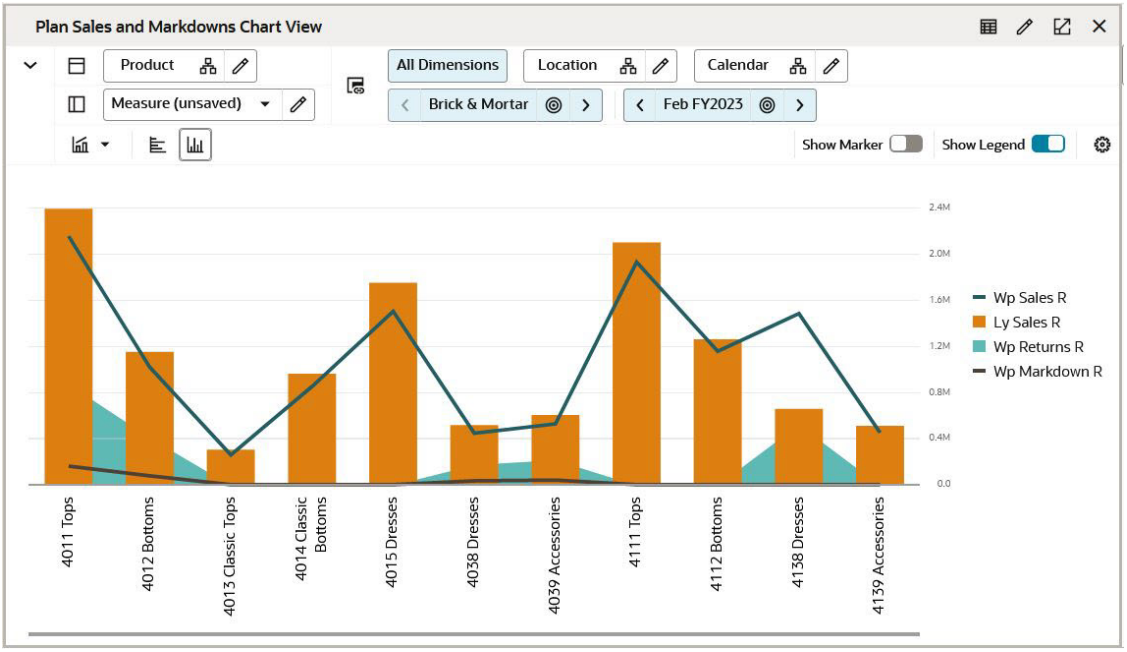
Figure 10-42 Dual Y-axis Chart



Combination Chart

The Combination Chart uses three different types of data markers to display different kinds of data items. The Combination Chart can be plotted by using custom chart option and changing the Chart Style as per requirement. You can 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 10-43 Combination Chart



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Boolean Charts

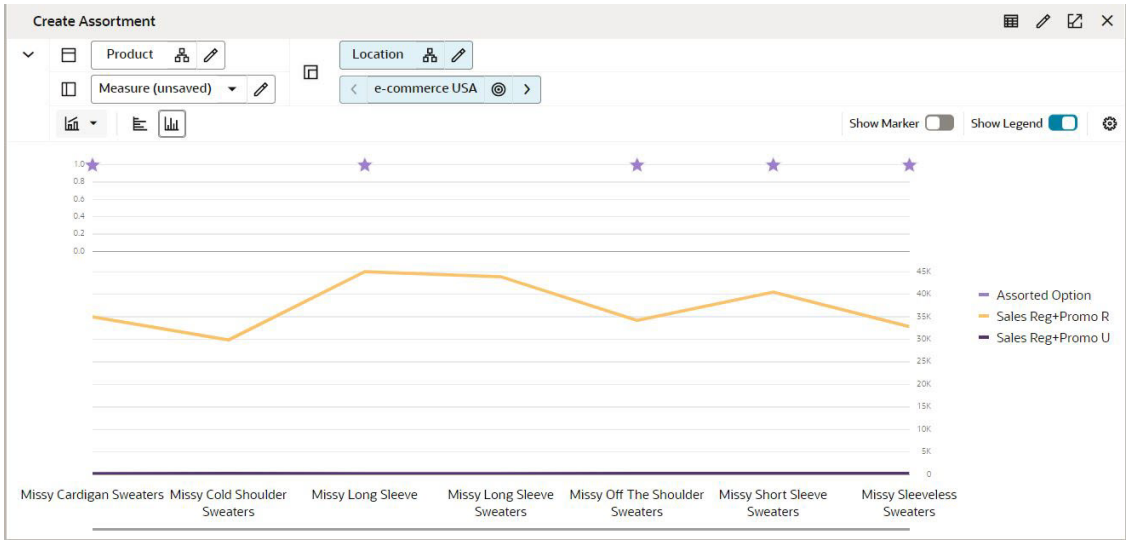
Boolean data can also be represented in chart along with other measures. Boolean measure data is represented in chart if the value of Boolean is True. Visual representation of Boolean in a chart helps the user to understand the data better and enables the ability to review the data visually. Examples of Boolean data include calendar events such as promotion weeks, selling weeks, stock-outs, and so on. To plot a Boolean measure, select the custom chart option, Click Setting and change the Boolean measures to Top Axis from Axis drop-down and click OK. The Boolean measure is plotted on the top area of the chart to display separately. This provides a clear indication of the Boolean measure and make it easier for you to read the Boolean measures along with other measures. The Boolean data is presented by colored symbols in the charts. Multiple Boolean measures in a single chart represented by different color symbols.

For example, the Figure 10-44 shows Assorted options - Boolean measure against Sales Reg+Promo R, Sales Reg+Promo U.

In the chart the Purple Star symbol represents the assorted options Boolean Value = True.

The Boolean measure assorted option is represented separately on the chart area along with Sales Reg+Promo R and Sales Reg+Promo U.

Figure 10-44 Boolean Data in Chart



The Boolean data can be represented in following charts:

- Area Chart
- Line 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 10-45 compares WP Sales R values for Missy Short Sleeve Sweaters across 10 different locations for one month.

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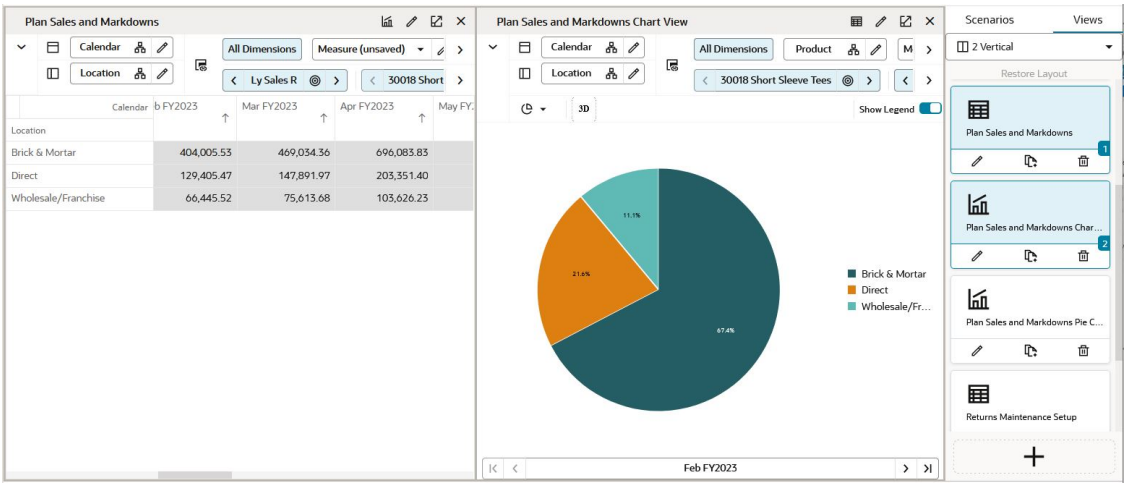
Figure 10-45 Single Group Chart

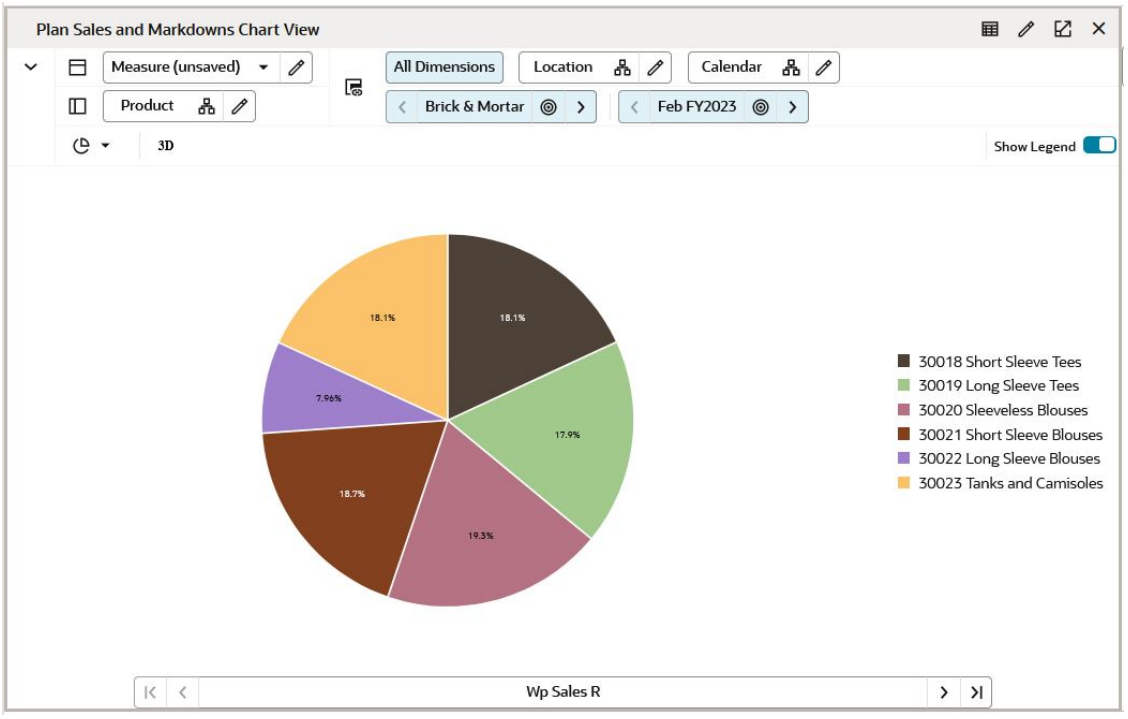


Pie Chart

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 10-46, because this is a single-group chart, only one measure is shown at a time.

Figure 10-46 Pie Chart



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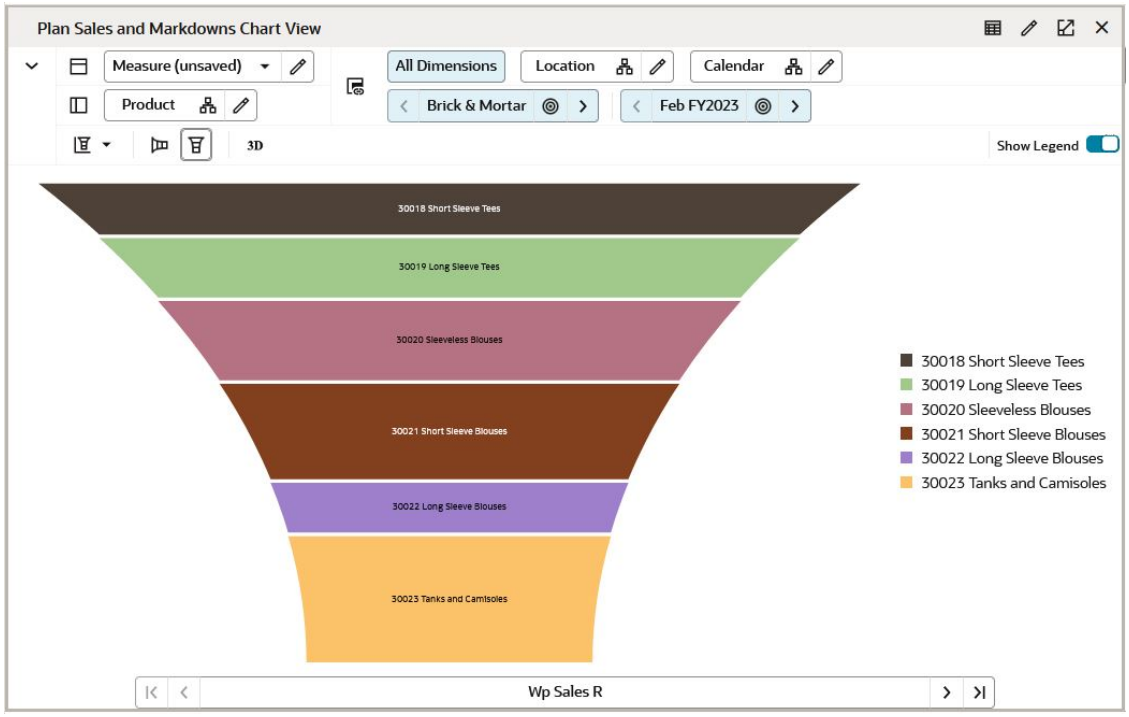
Funnel Chart

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 10-47 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.

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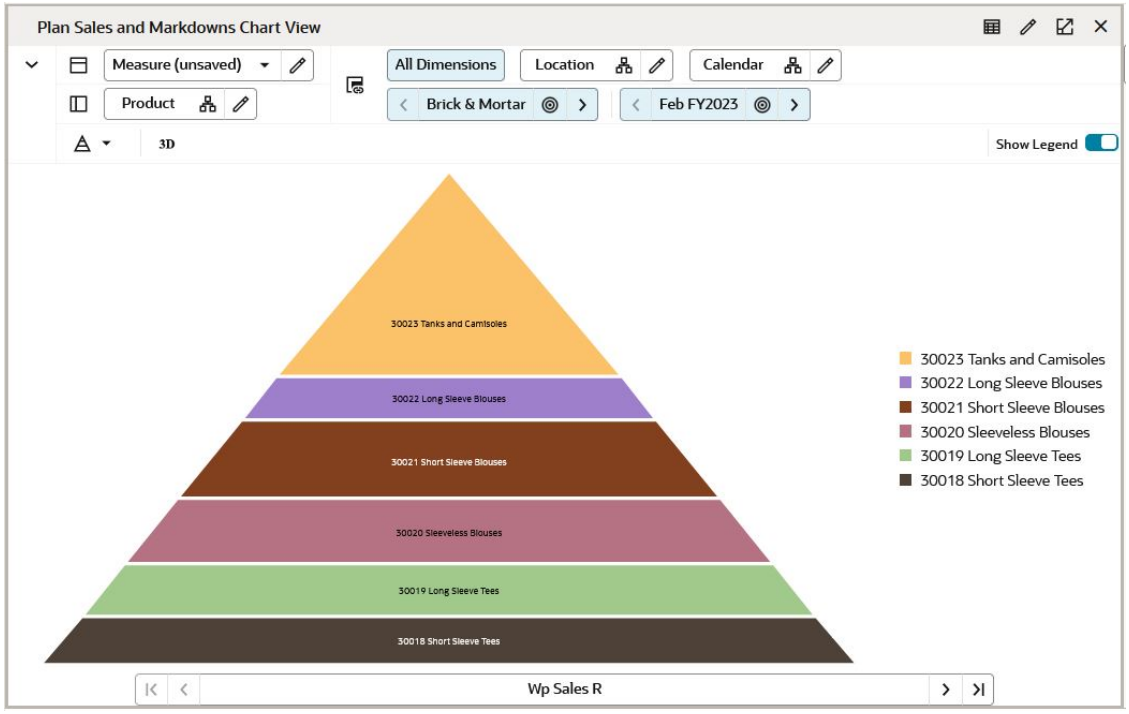
Figure 10-48 Pyramid Chart



Formatting Charts

Each of the chart types has different types of formatting options. To change the chart format, click one of the buttons beneath 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.

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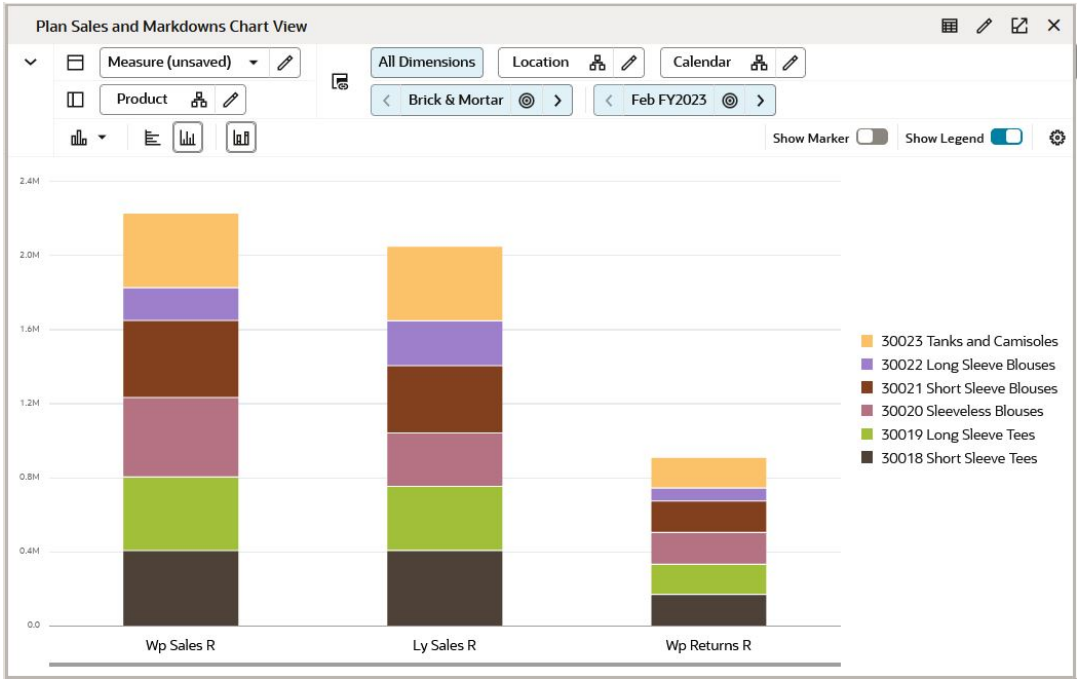
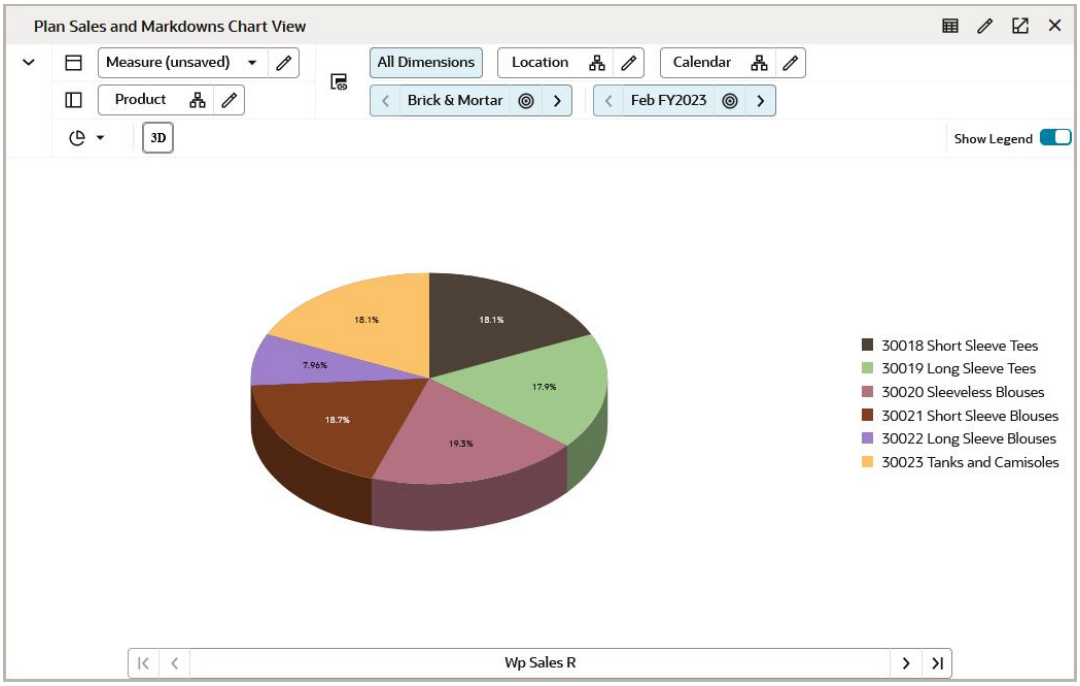
Figure 10-49 Stacked Chart



- The **3-D charts** icon shown in Figure 10-50 rotates the chart into a 3-D display.

Figure 10-50 3-D Chart



- The **Horizontal** icon shown in Figure 10-51 rotates the chart from vertical to horizontal.

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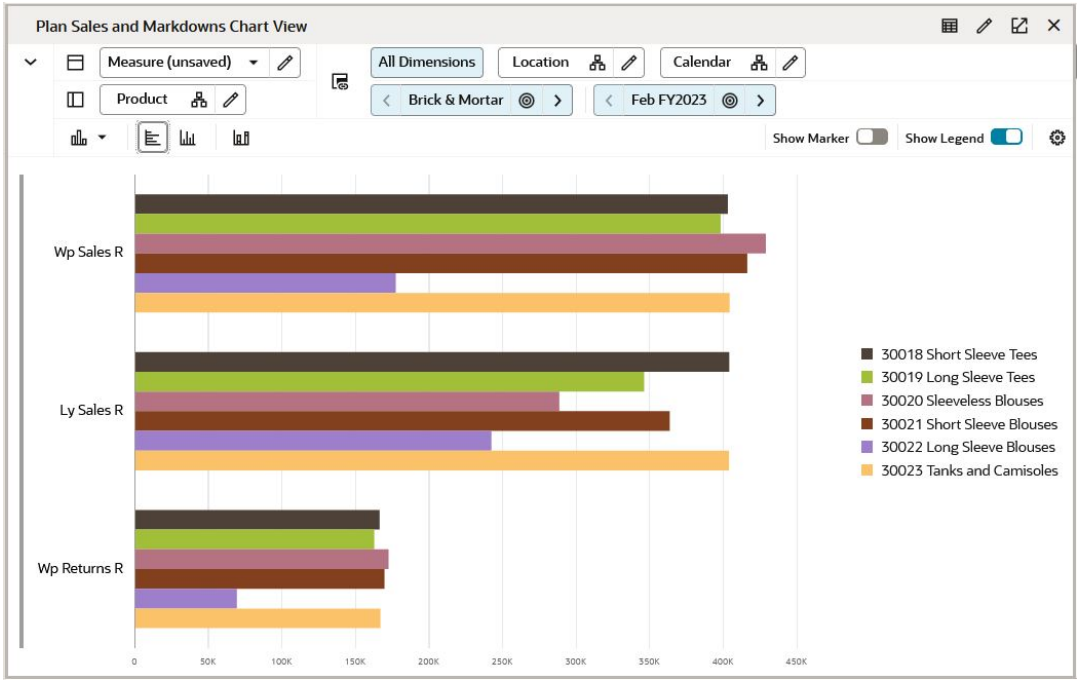
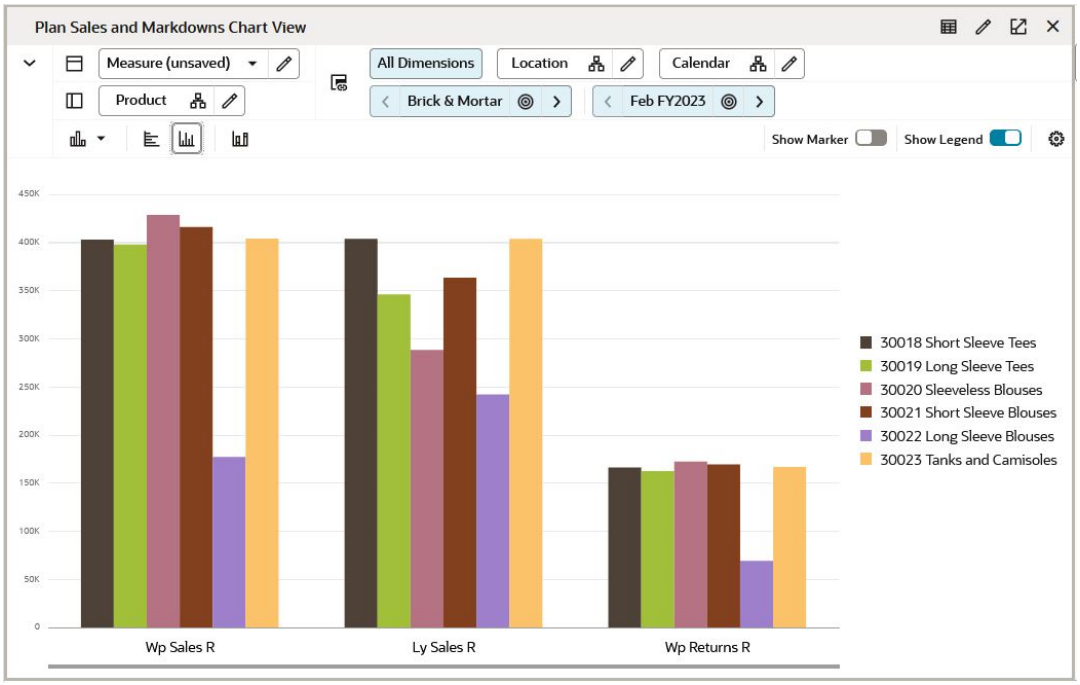
Figure 10-51 Horizontal Chart



- The **Vertical** icon shown in Figure 10-52 rotates the chart from vertical to horizontal.

Figure 10-52 Vertical Chart



- The **Change Chart Type** icon shown in Figure 10-53 allows you to quickly change the chart type to any of the other types not currently displayed.

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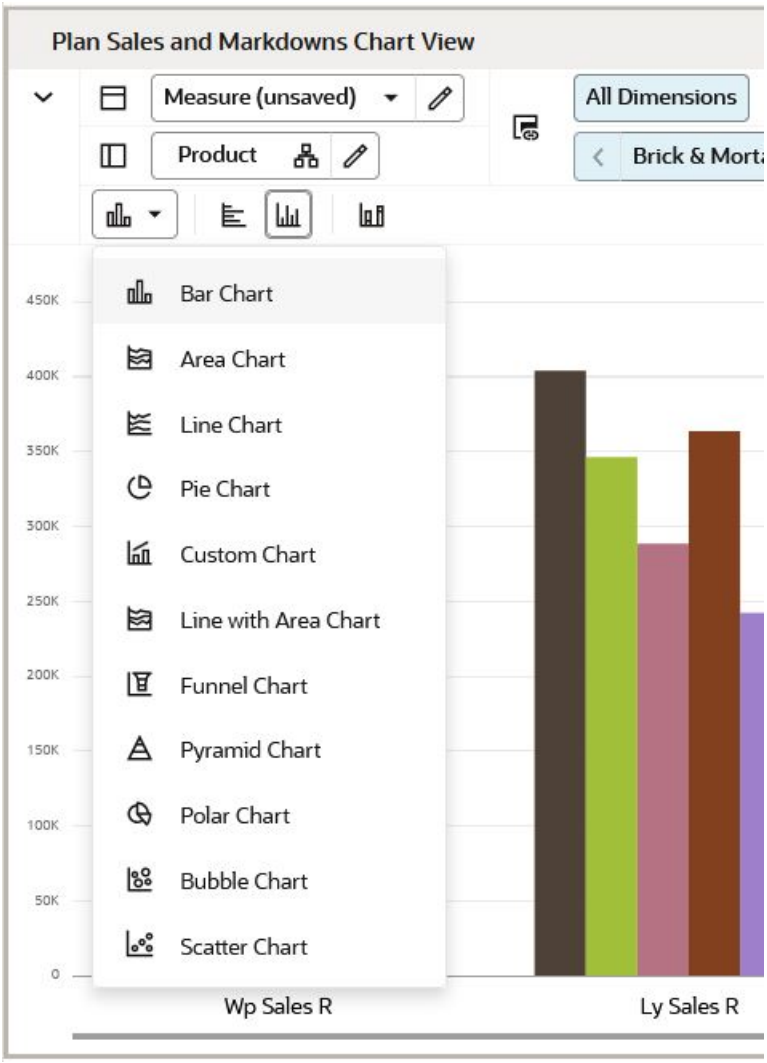
Figure 10-53 Change Chart Type



- The **Show Legends** toggle button shown in Figure 10-54 allows you to show or hide the legends of charts. Hiding the legend gives more space to view the graph on the layout.

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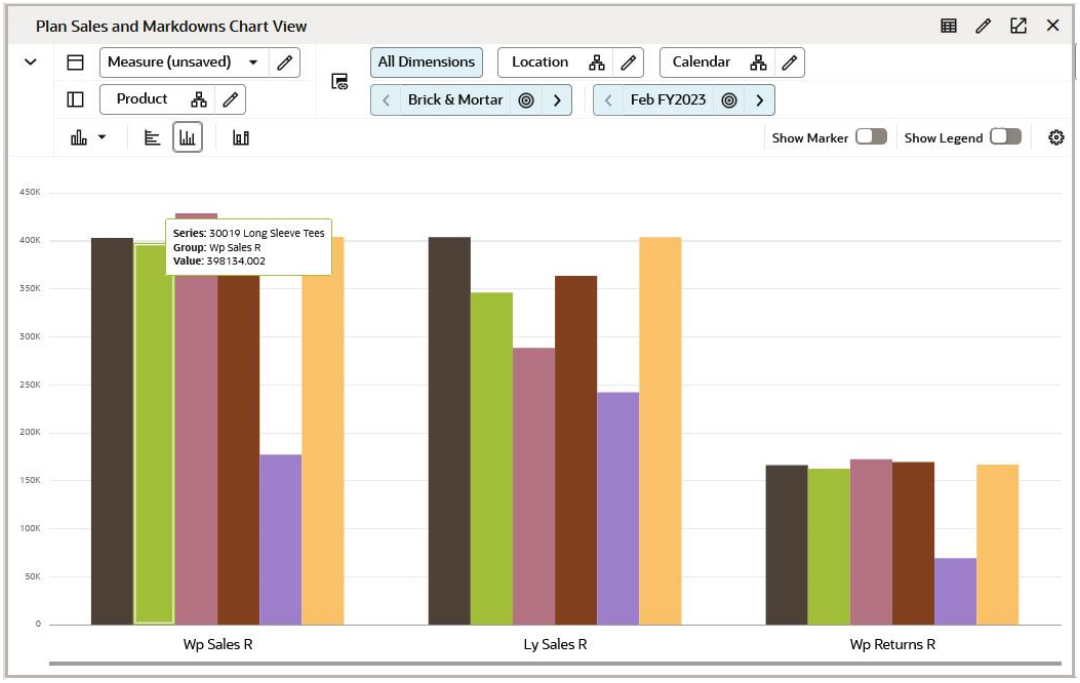
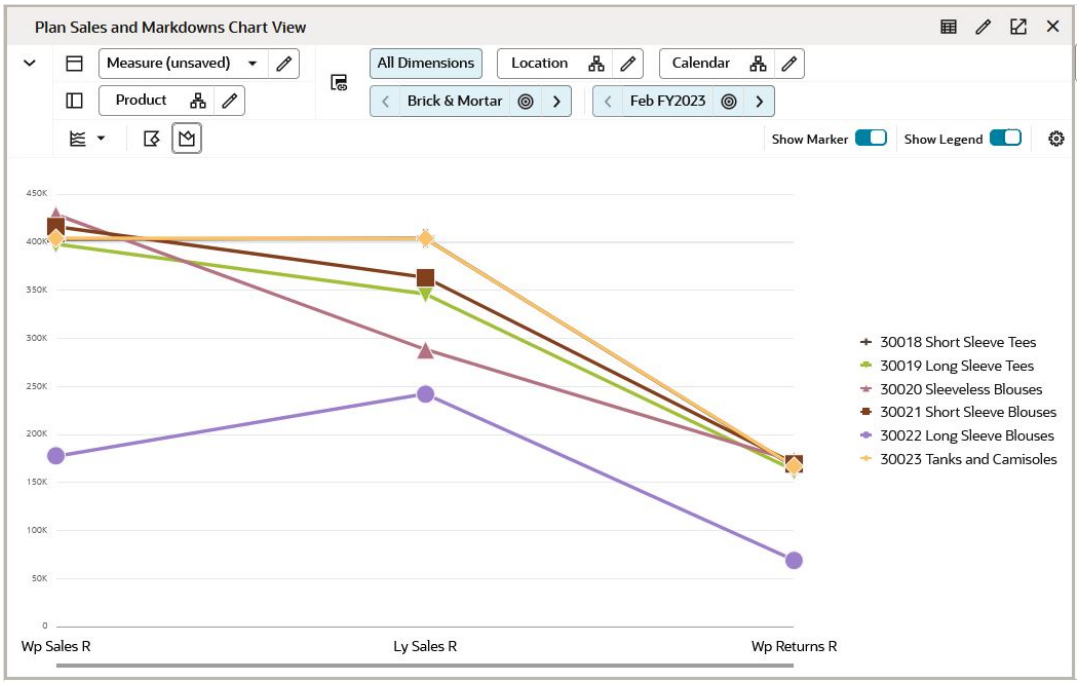
Figure 10-54 Show or Hide Legends Toggle



- The **Show Marker** toggle button shown in Figure 10-55 allows you to show or hide the markers on the chart. This option is enabled only for line, area, combination and line with area chart. This marker points makes it easy to read data on the chart.

Figure 10-55 Show or Hide Marker Toggle



- Chart setting allows you to edit the marker symbol and color for the series mapped on the chart. Ability to assign the different symbols helps you to identify the markers clearly for measures plotted on the charts. You can also assign colors to the series mapped on the charts.

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The **Edit Marker** window shown in Figure 10-56 has the list of the series mapped on the chart. You can edit the marker symbol and color from the available list shown in Figure 10-57 and Figure 10-58 next to each series. To access the **Edit Marker** window, click the gear icon next to the **Show Marker** and **Show Legend** toggle buttons.

Figure 10-56 Chart Setting Window

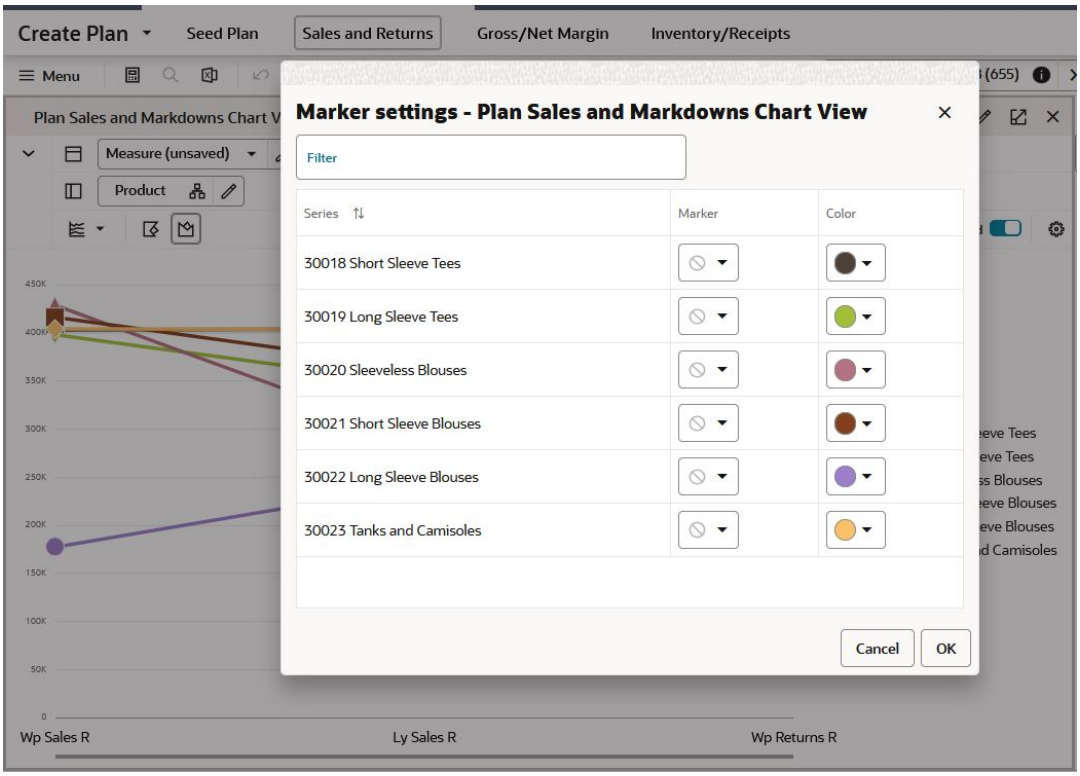

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Figure 10-57 Edit the Marker

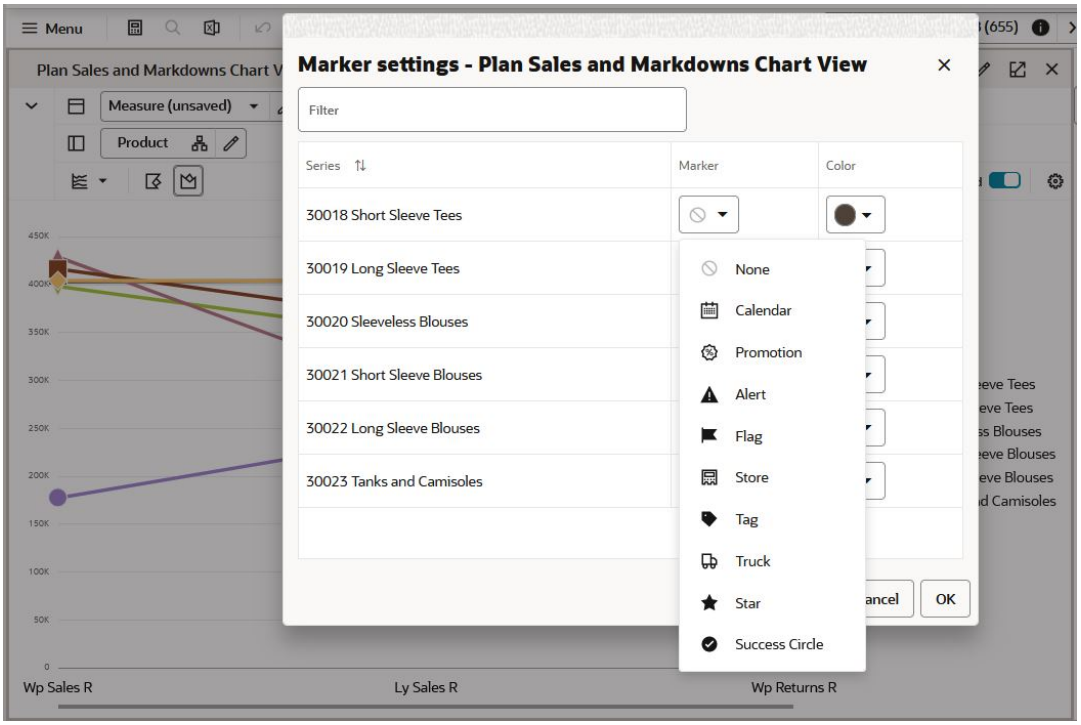
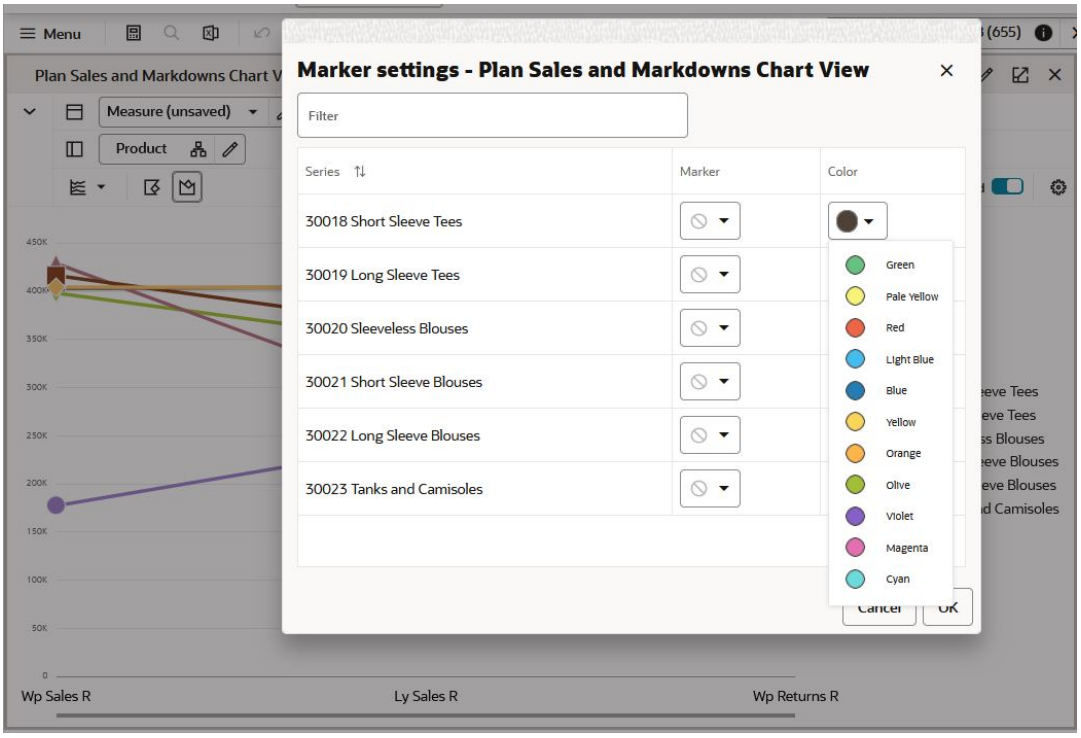


Figure 10-58 Edit the Color



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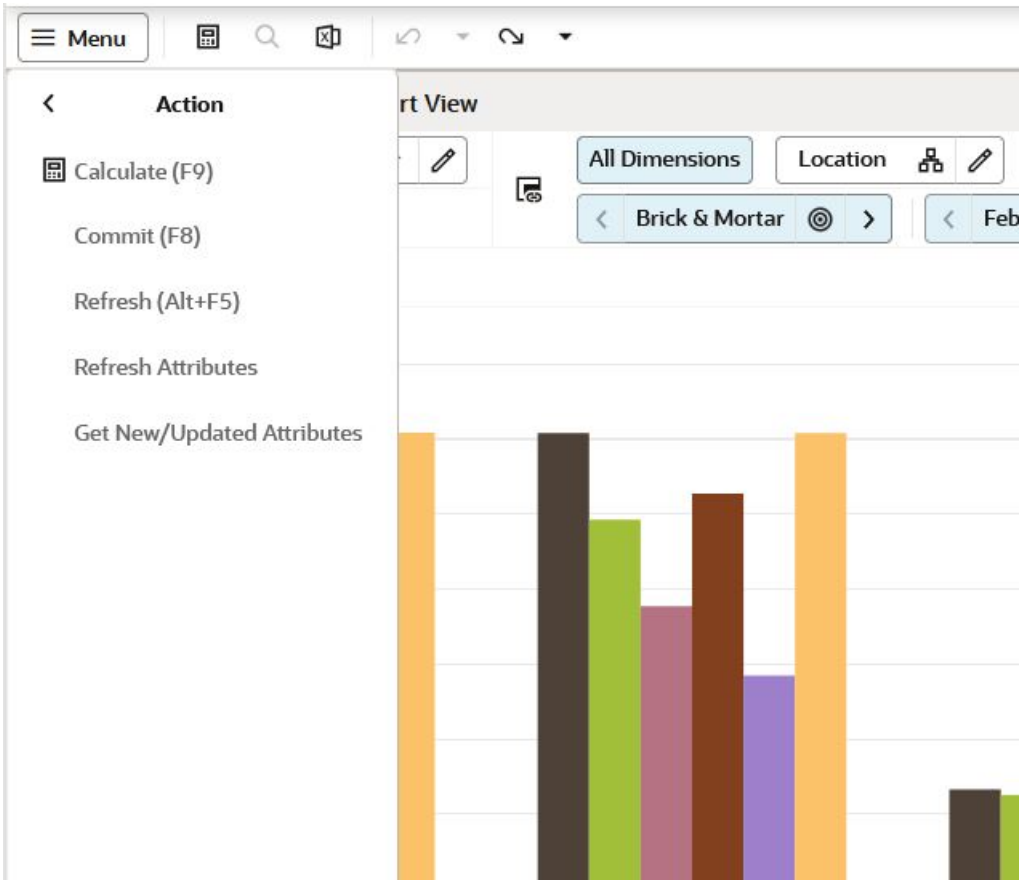
Refreshing the Chart

To update the chart with the latest data from the database, click **menu**, then **action**, and then **Refresh** (Alt + F5). This refreshes the charts and pivot tables.

Figure 10-59 Refresh Chart



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11
Formatting

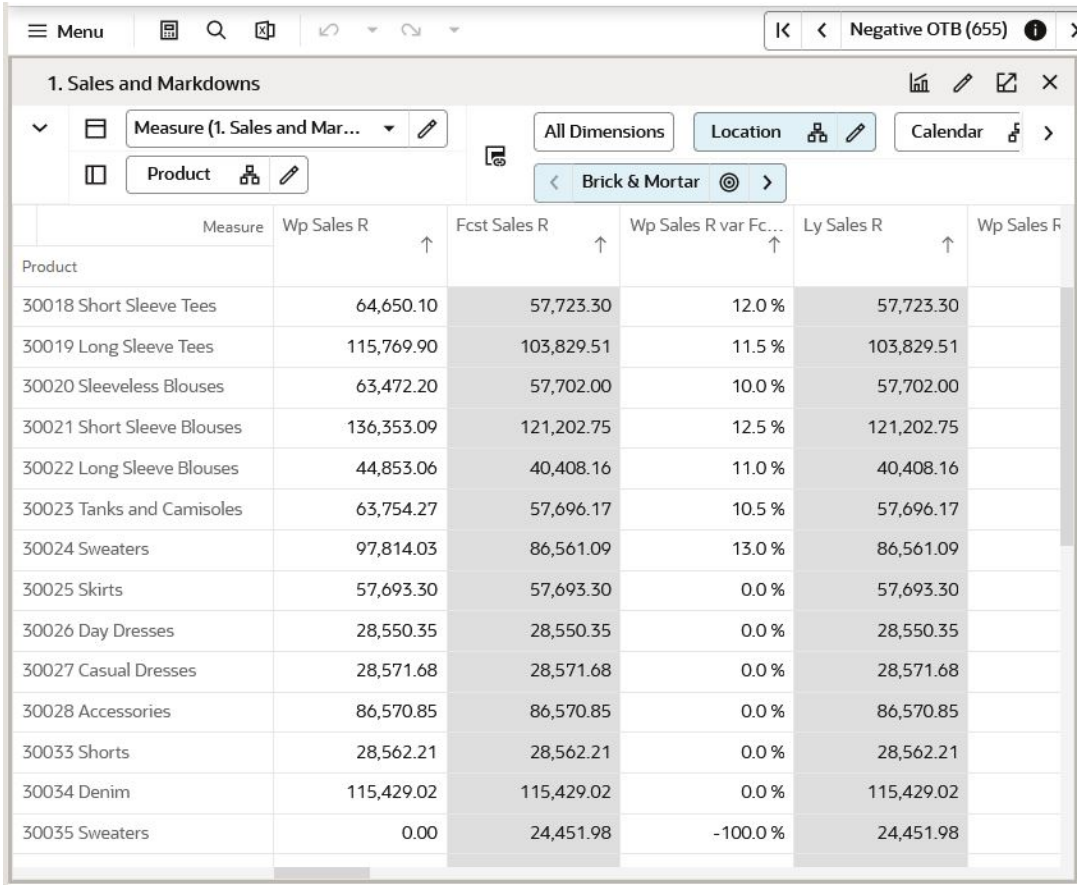
Using the Format functionality, you can set and clear formats that apply to measures, dimensions, and exceptions. You can make changes to single or multiple measures, dimensions, and exceptions and apply these changes across one, many, or all views in the workspace.

Using Filters in the Format Window

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

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

Figure 11-1 Quick Access Toolbar Menu



Product	Measure	Wp Sales R	Fcst Sales R	Wp Sales R var Fc...	Ly Sales R	Wp Sales R
30018 Short Sleeve Tees		64,650.10	57,723.30	12.0 %	57,723.30	
30019 Long Sleeve Tees		115,769.90	103,829.51	11.5 %	103,829.51	
30020 Sleeveless Blouses		63,472.20	57,702.00	10.0 %	57,702.00	
30021 Short Sleeve Blouses		136,353.09	121,202.75	12.5 %	121,202.75	
30022 Long Sleeve Blouses		44,853.06	40,408.16	11.0 %	40,408.16	
30023 Tanks and Camisoles		63,754.27	57,696.17	10.5 %	57,696.17	
30024 Sweaters		97,814.03	86,561.09	13.0 %	86,561.09	
30025 Skirts		57,693.30	57,693.30	0.0 %	57,693.30	
30026 Day Dresses		28,550.35	28,550.35	0.0 %	28,550.35	
30027 Casual Dresses		28,571.68	28,571.68	0.0 %	28,571.68	
30028 Accessories		86,570.85	86,570.85	0.0 %	86,570.85	
30033 Shorts		28,562.21	28,562.21	0.0 %	28,562.21	
30034 Denim		115,429.02	115,429.02	0.0 %	115,429.02	
30035 Sweaters		0.00	24,451.98	-100.0 %	24,451.98	

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

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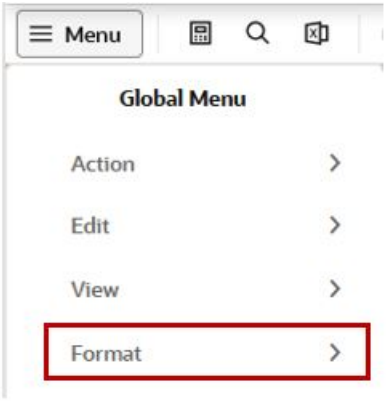
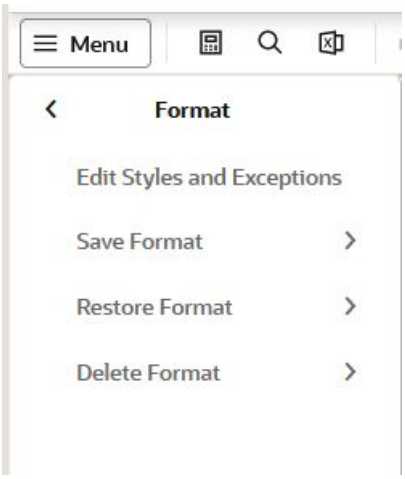
Figure 11-2 Opening the Format Menu



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

Figure 11-3 Edit Styles and Exceptions



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

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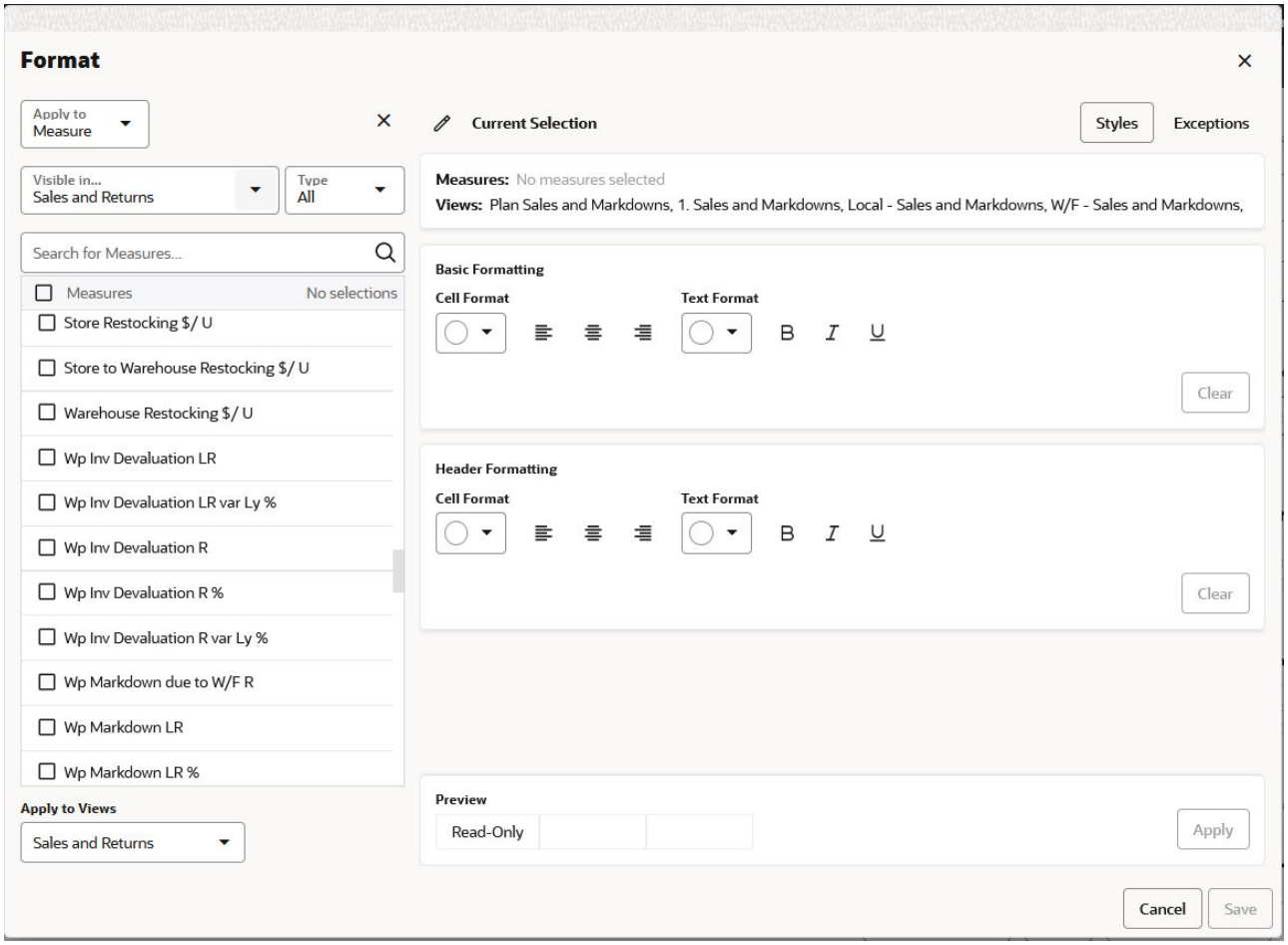
Figure 11-4 Filter Measures



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 window, 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.

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> **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 window. The colors listed in the window 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 window, but you will not see that color in the list of available colors.

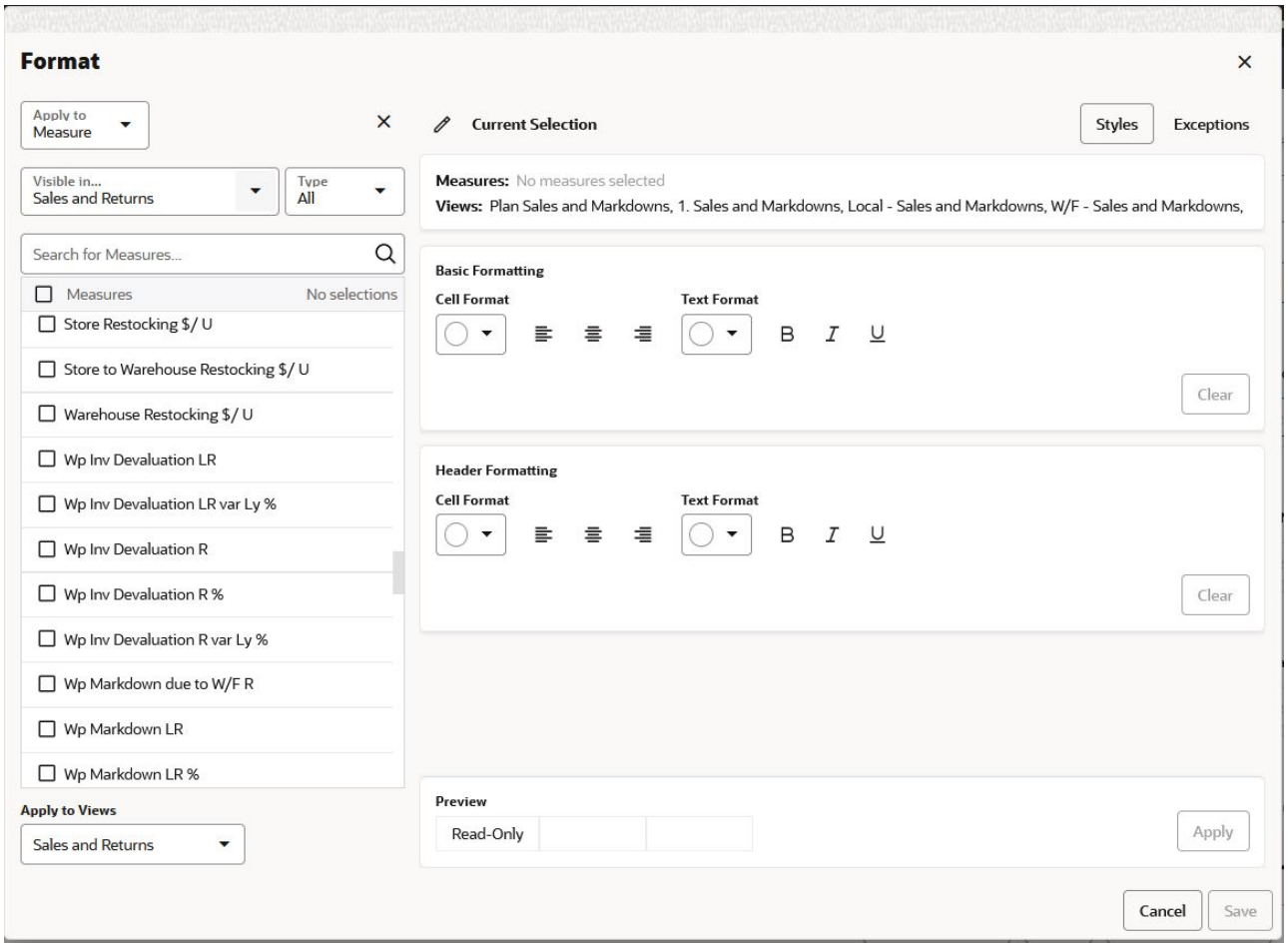
When the filter feature is not in use, the measures that appear in the Measure field within the Apply measure format section show the measures that are contained in the current view.

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 window, 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 Filters in the Format Window" for more details.

Figure 11-5 Styles Tab



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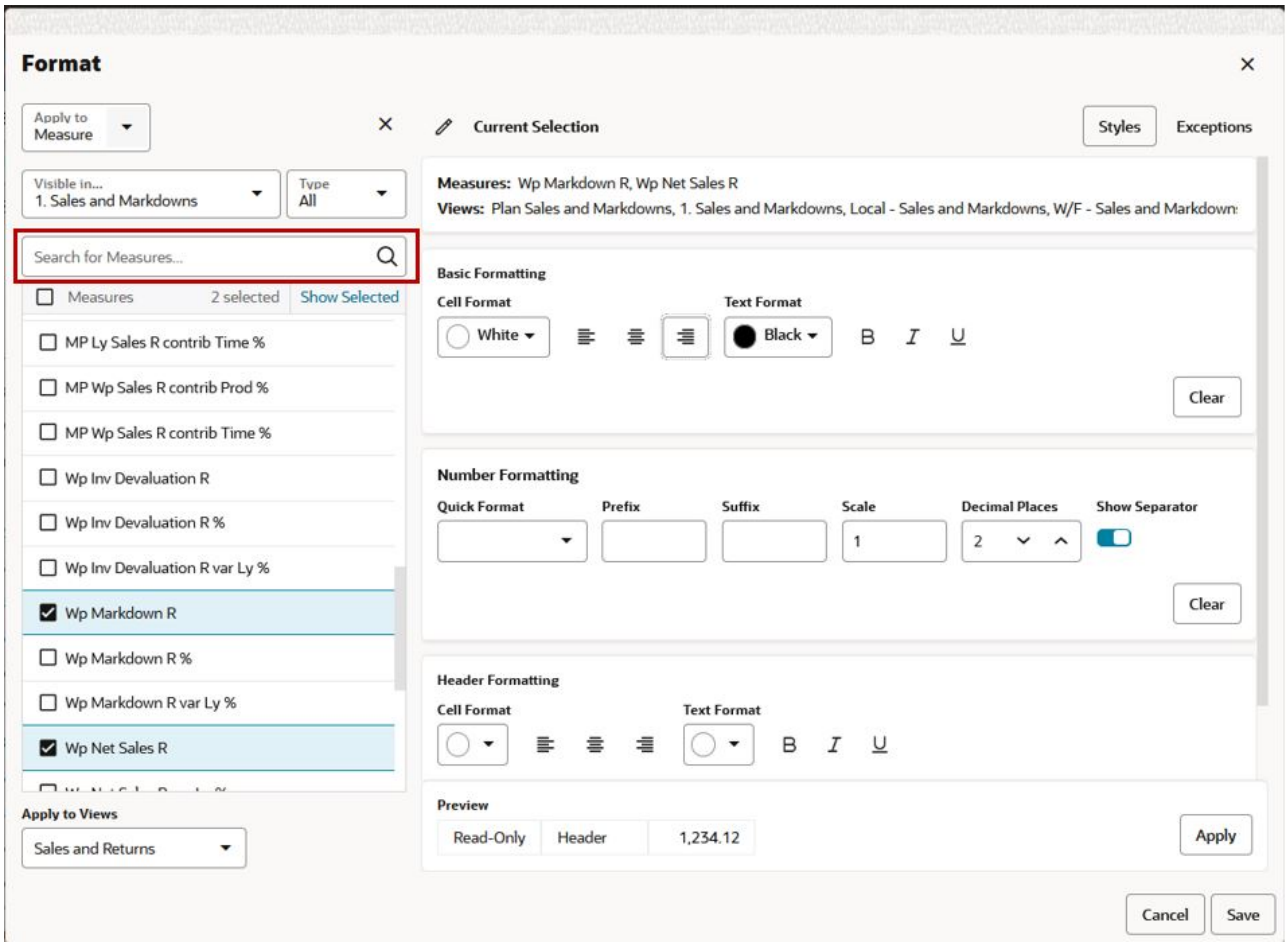
2. Use the filter to find the measures you want to alter. You can enter search text in the Search for measures field or select the measures in the display area by scrolling. You can select one, several, or all. To view only the selected measure, click **Show Selected.** To select all measures, click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

Figure 11-6 Filter to Select Measure



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

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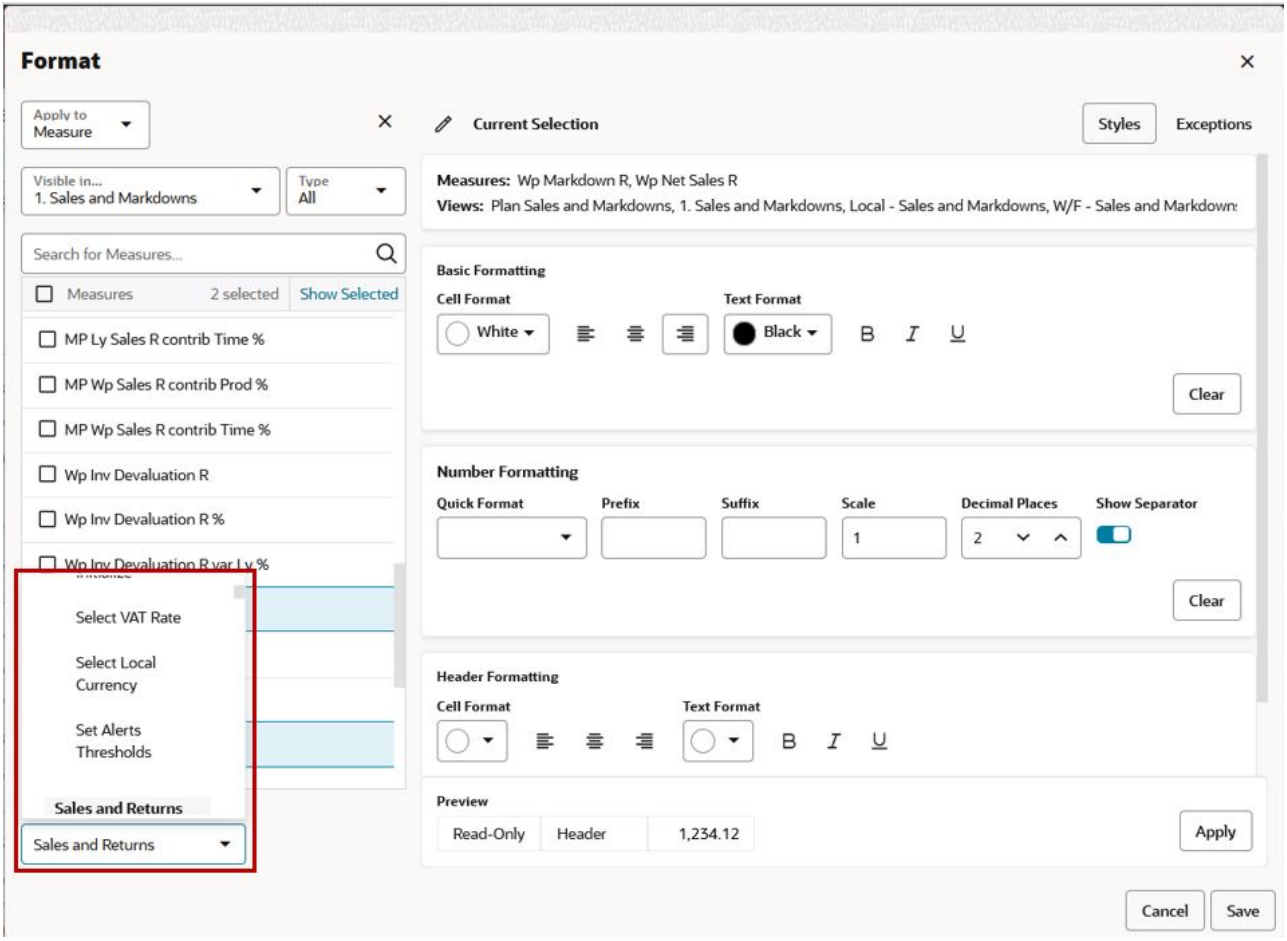
Figure 11-7 Applies To Field to Apply Formats



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

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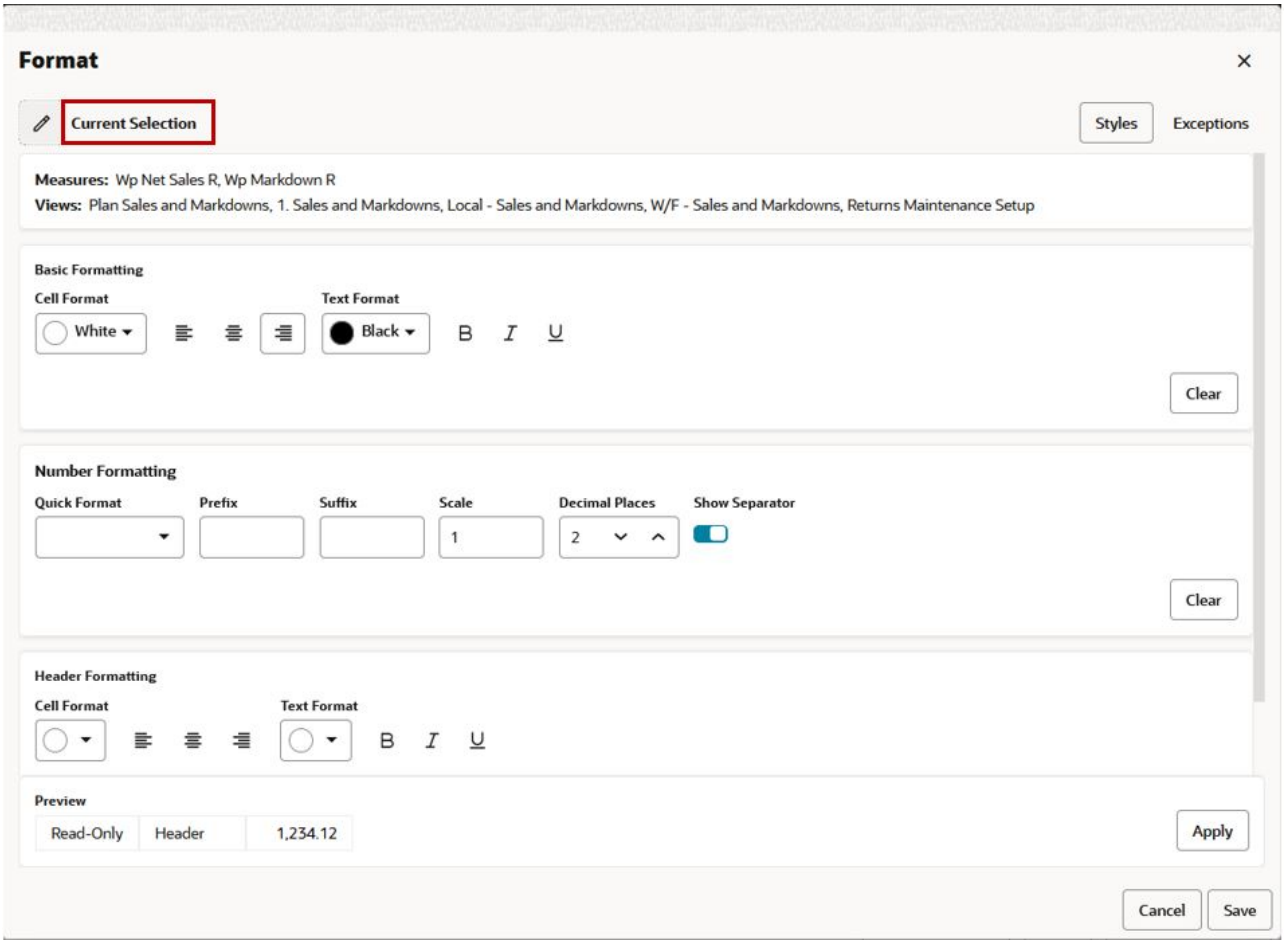
Figure 11-8 Hide Selection Panel



5. You can see the summary of your selection under Measures and Views, as shown in Figure 11-9. Click **Show More** or **Show Less** to see the selection criteria, as shown in Figure 11-10.

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Figure 11-9 Selection Measure Summary

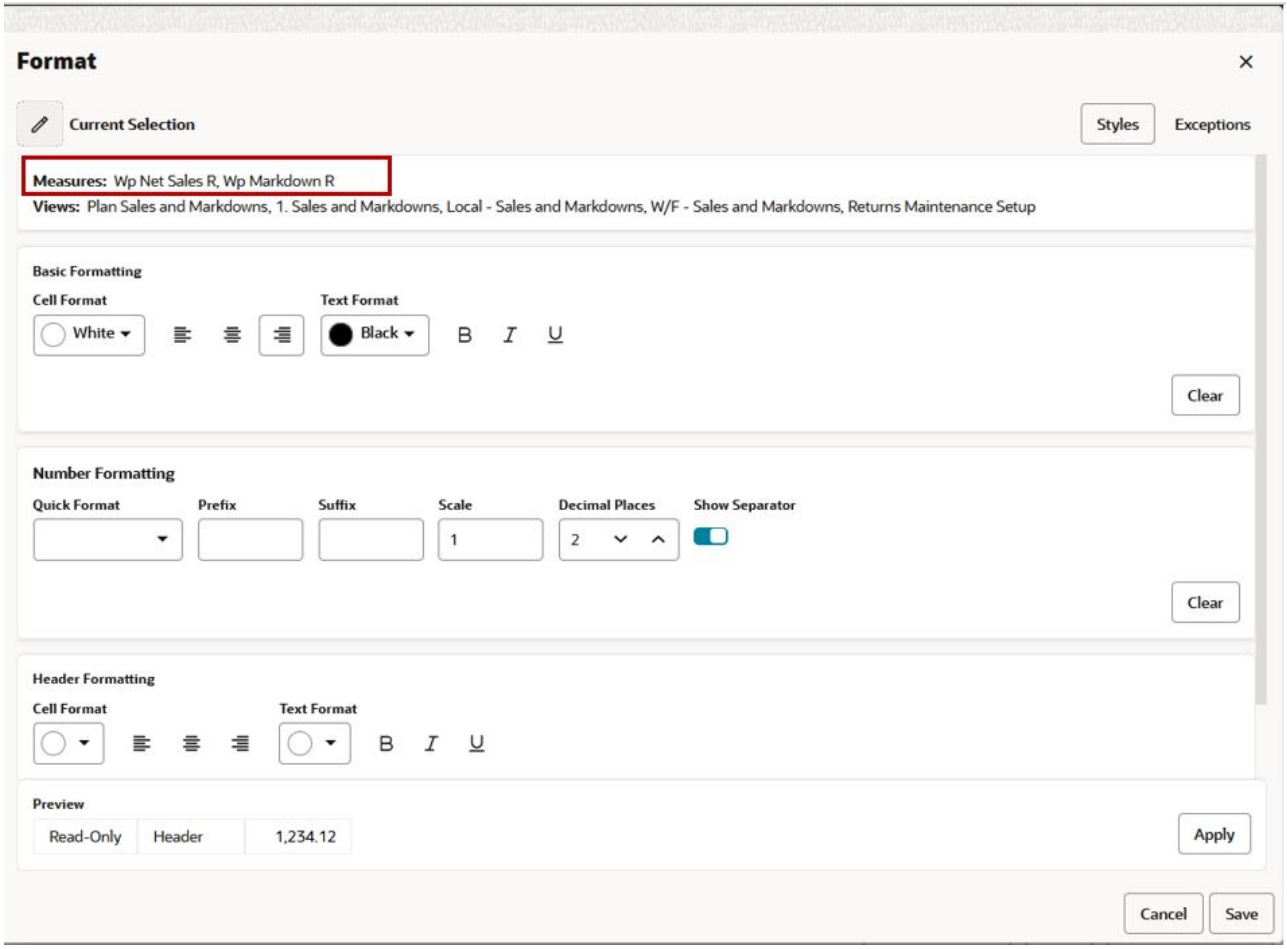

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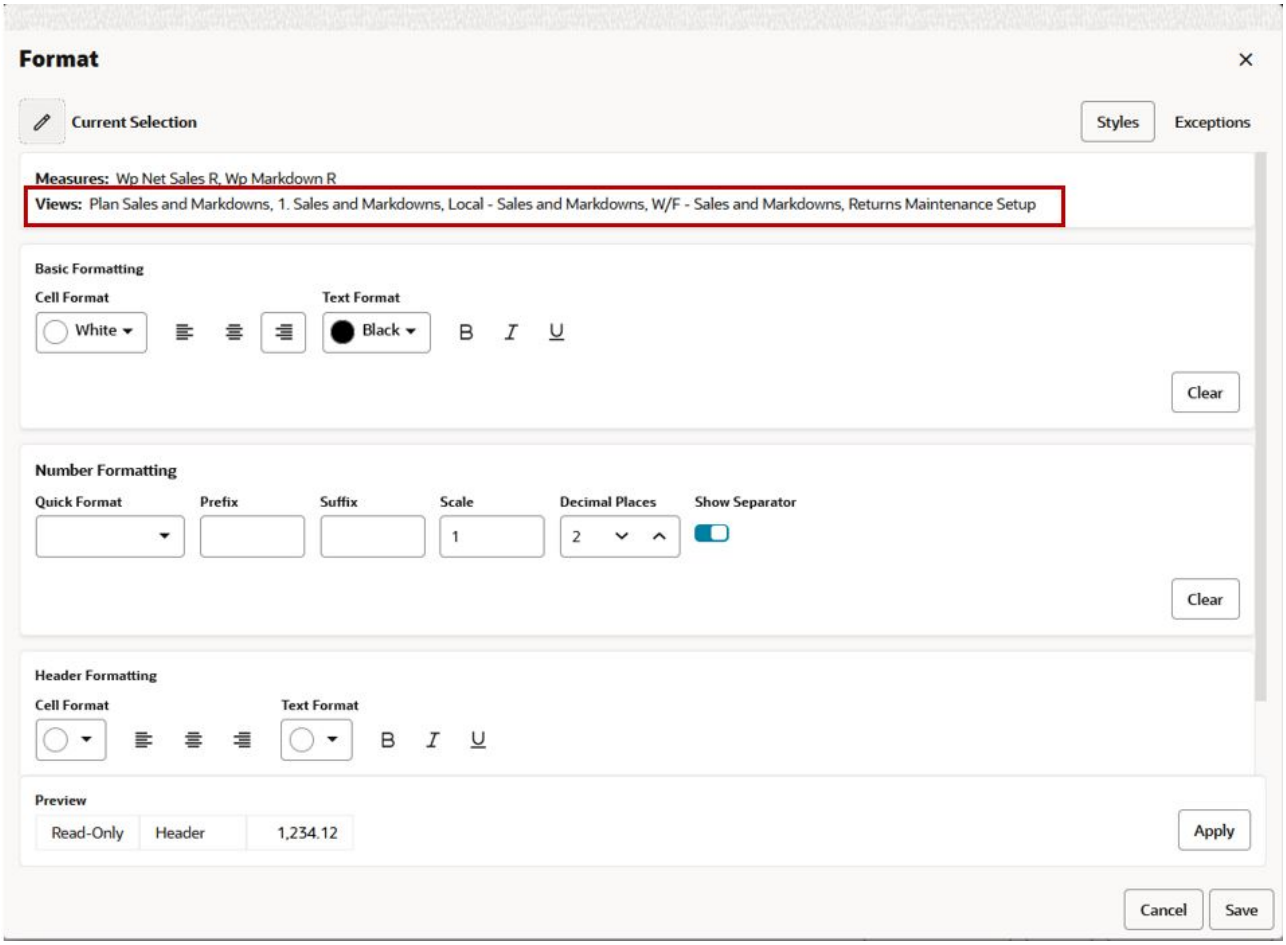
Figure 11-10 Selection Views



6. The Basic Formatting section includes the following options:
   - Cell Format
   - Text alignment (Left, Center, Right)
   - Text Format
   - Bold
   - Italics
   - Underline

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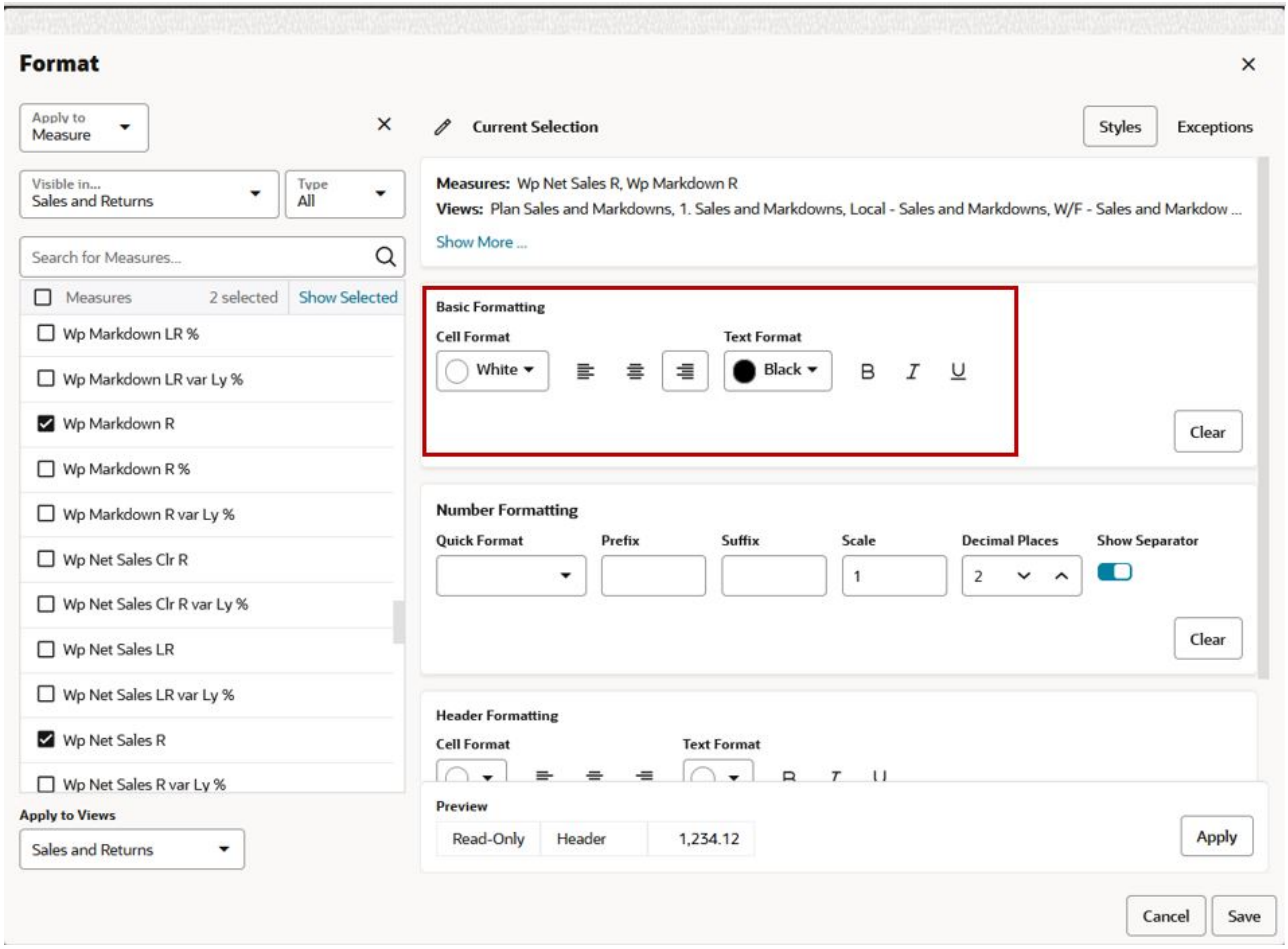
Figure 11-11 Basic Formatting Options



7. You can modify the basic formats as needed. To clear all styles, click **Clear**.
8. The Header Formatting section includes the following options:
   - Cell Format
   - Text Alignment (Left, Center, Right). By default, the text alignment is left for rows and center for columns.
   - Text Format
   - Bold
   - Italics
   - Underline

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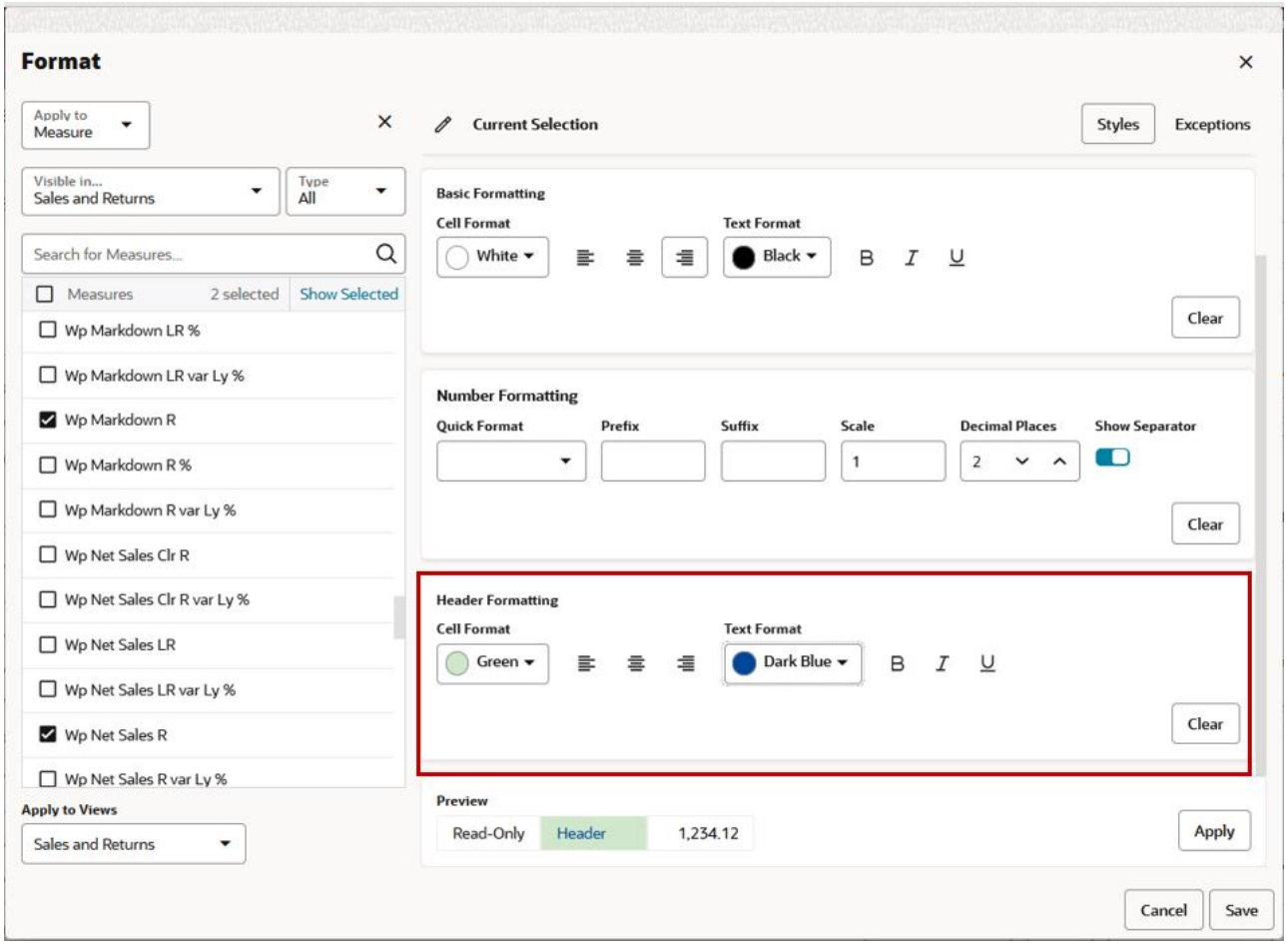
Figure 11-12 Header Formatting Options



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

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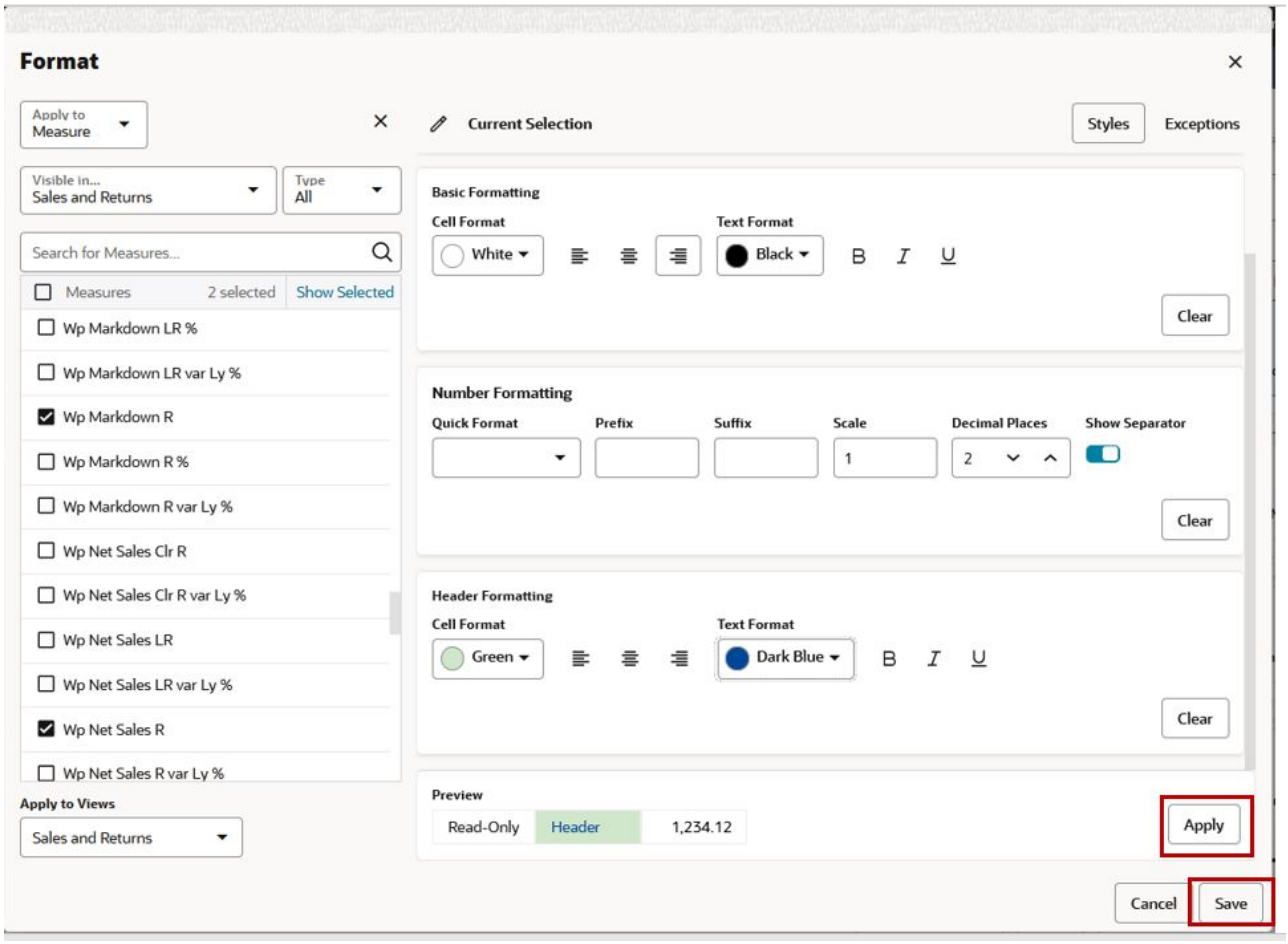
Figure 11-13 Apply or Save in Format Window



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

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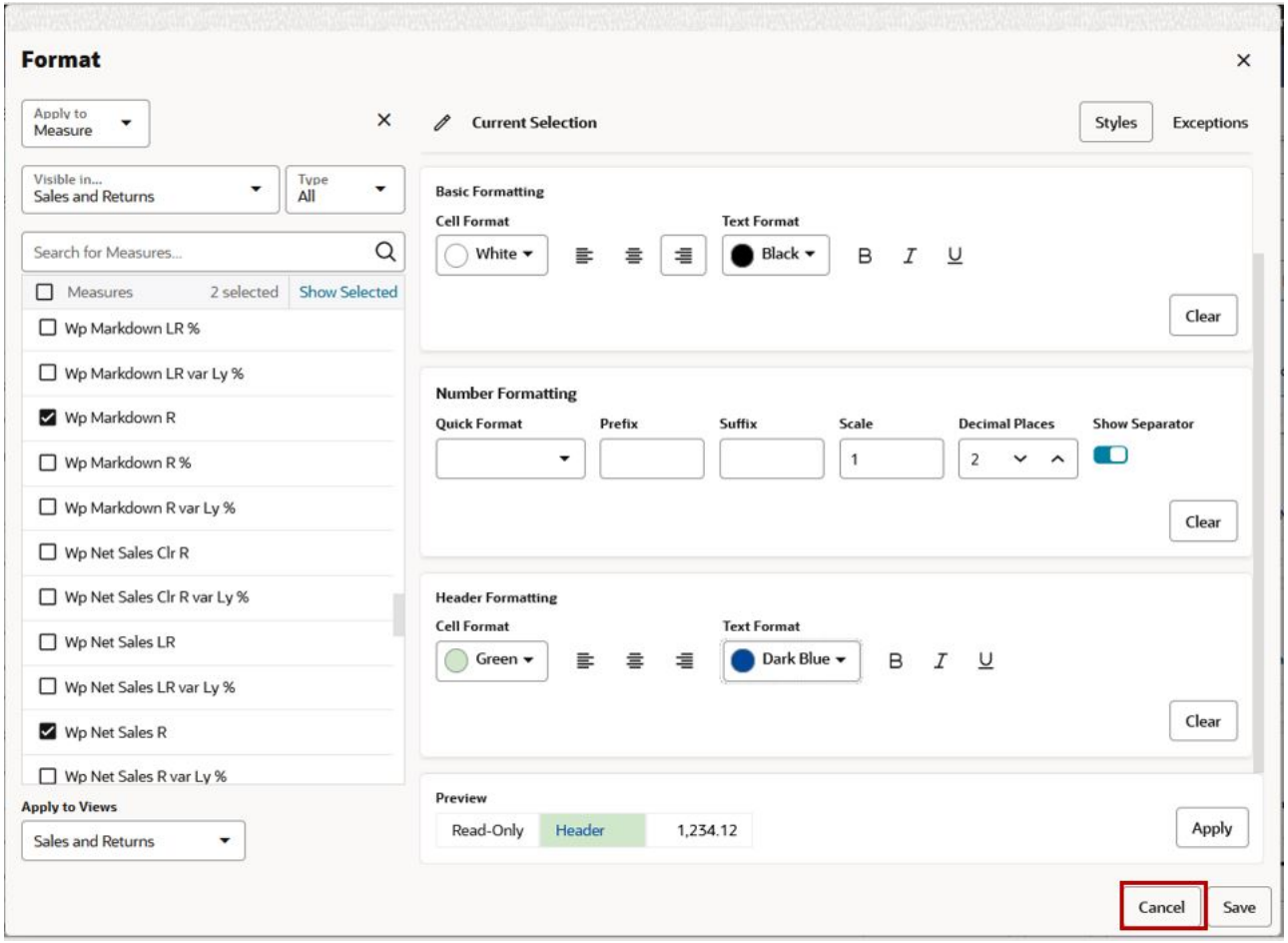
Figure 11-14 Close the Format Window



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 Filters in the Format Window" for more details.

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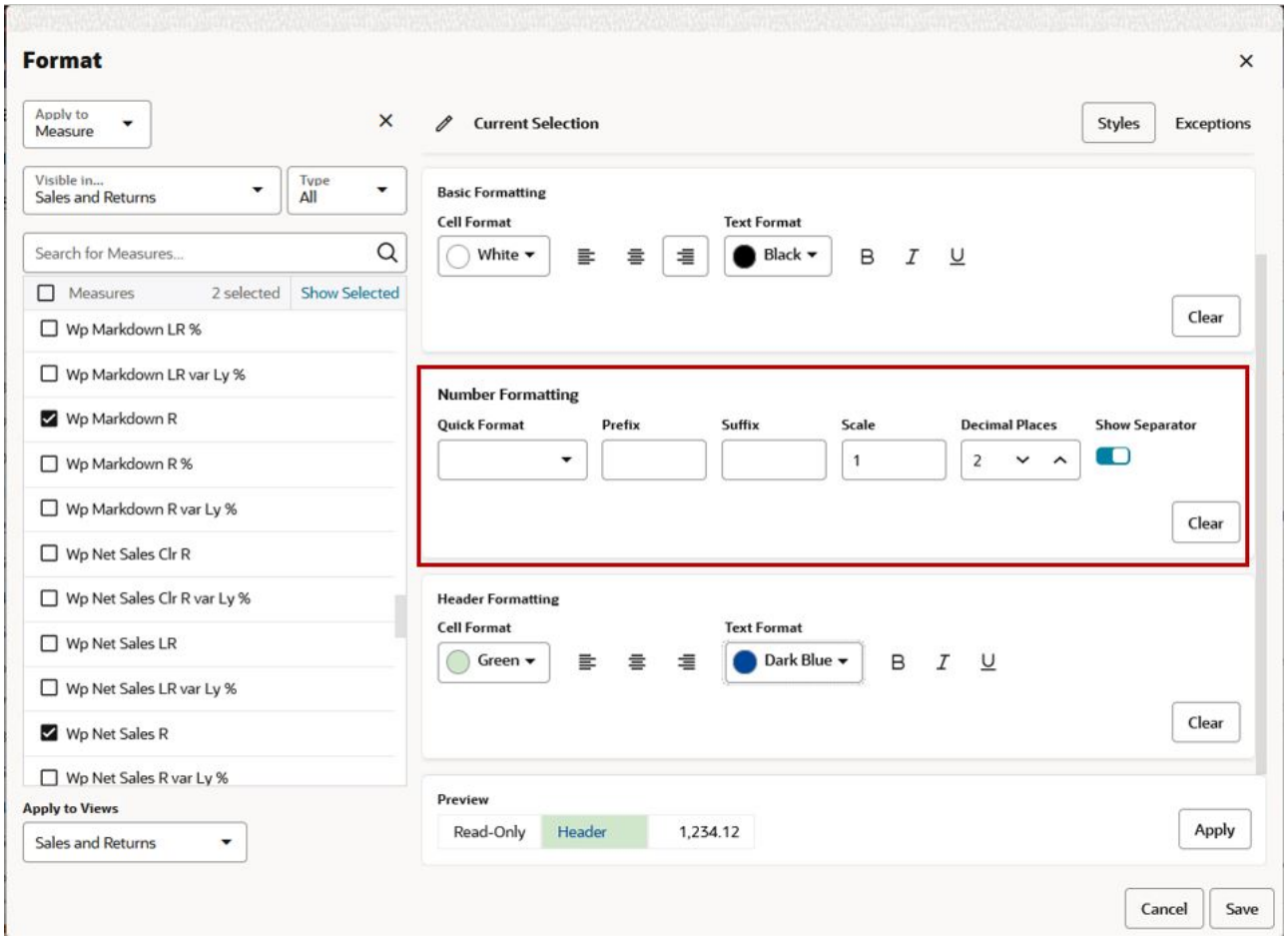
Figure 11-15 Altering Number Formatting



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

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

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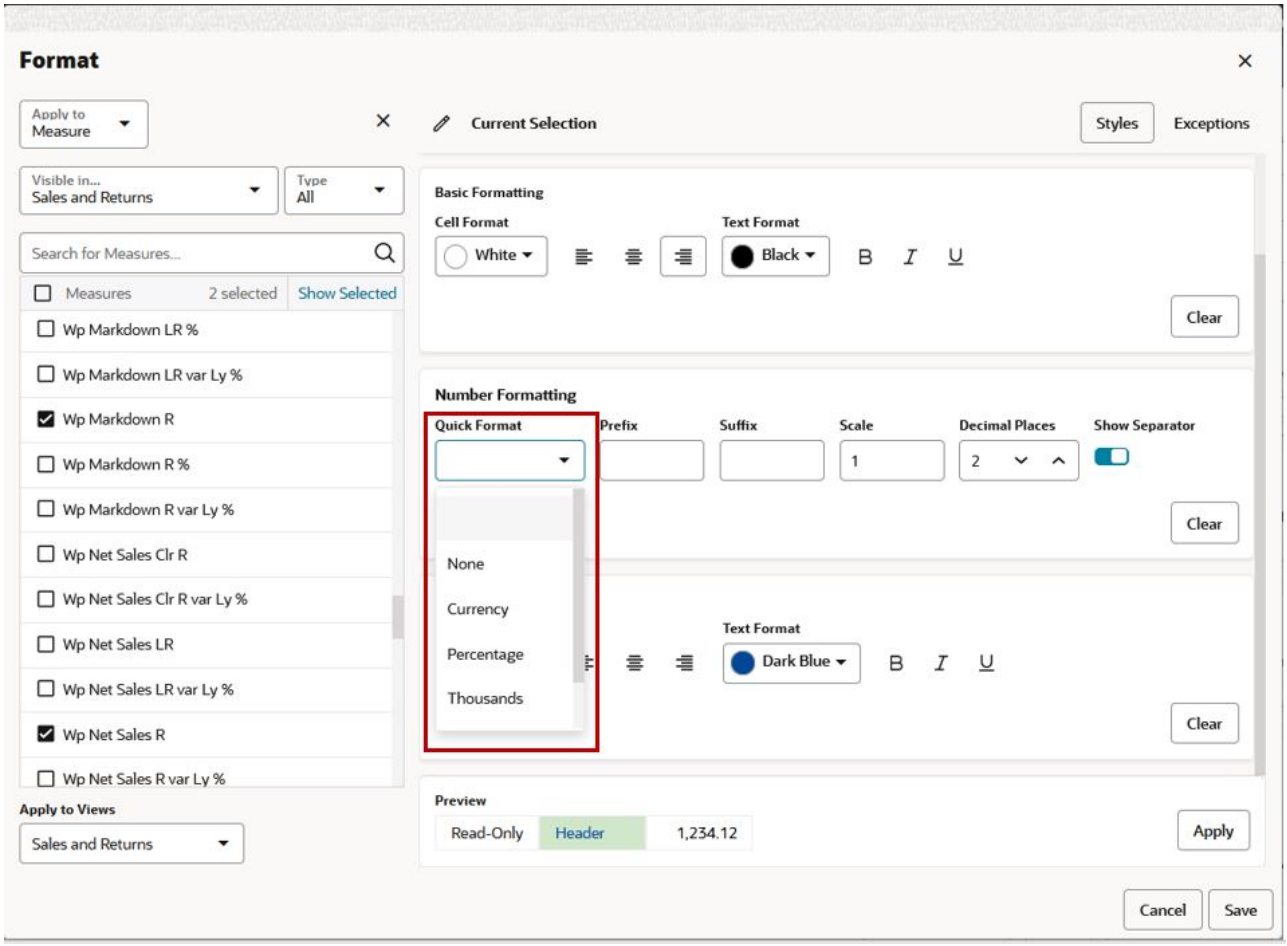
Figure 11-16 Quick Format for Number Formatting



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

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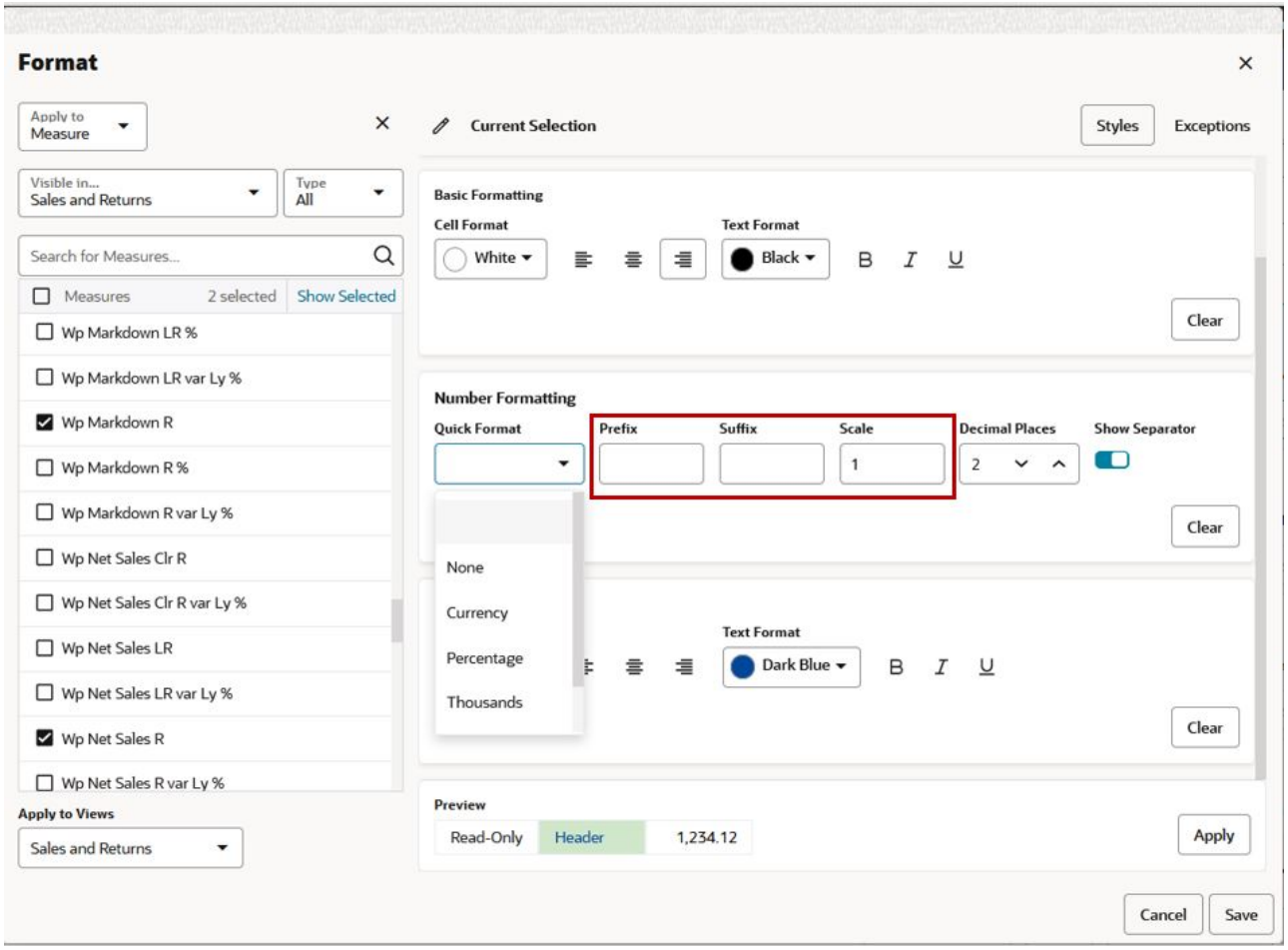
Figure 11-17 Prefix, Suffix, and Scale Fields



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

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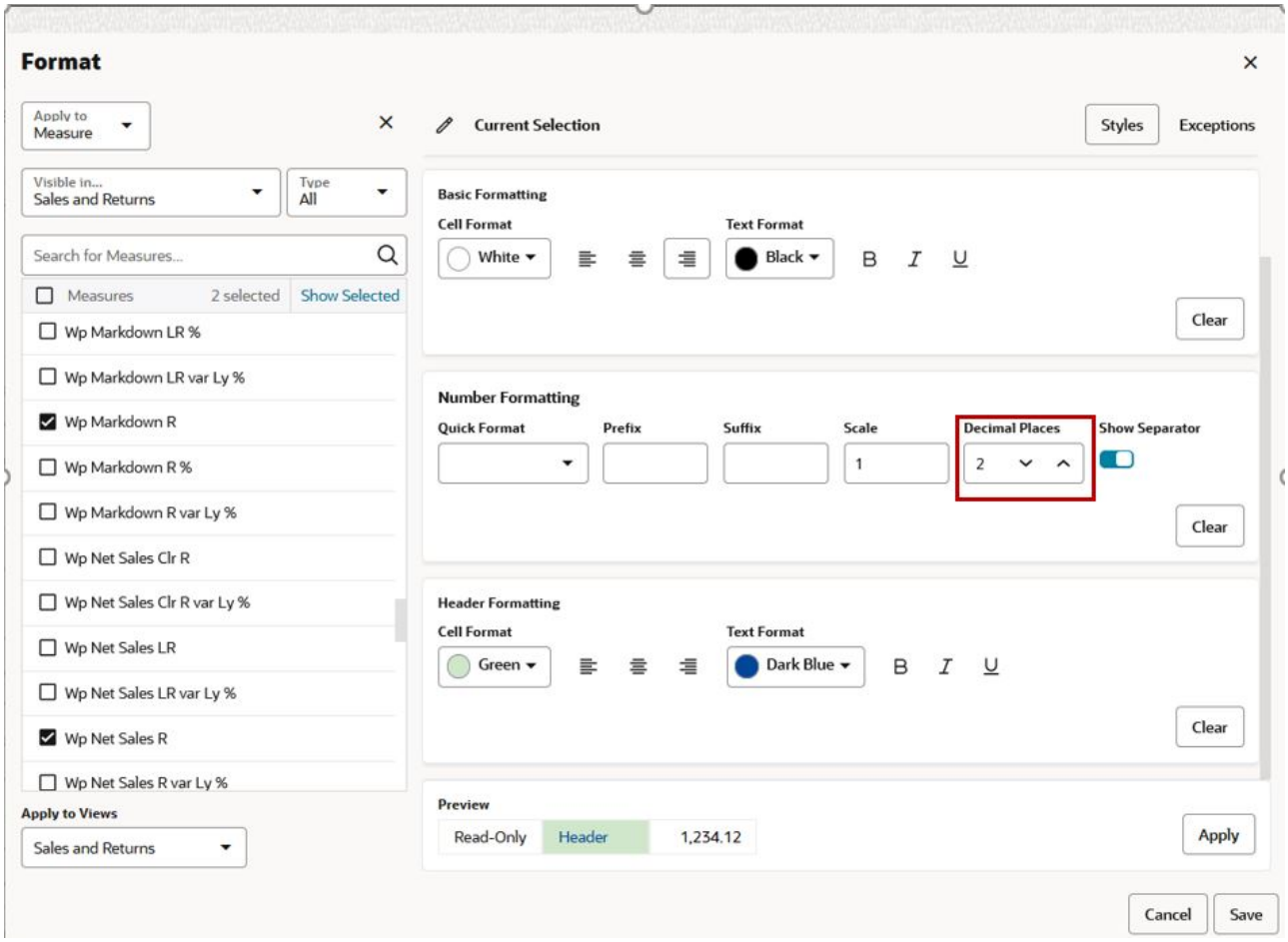
Figure 11-18 Setting Decimal Places



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

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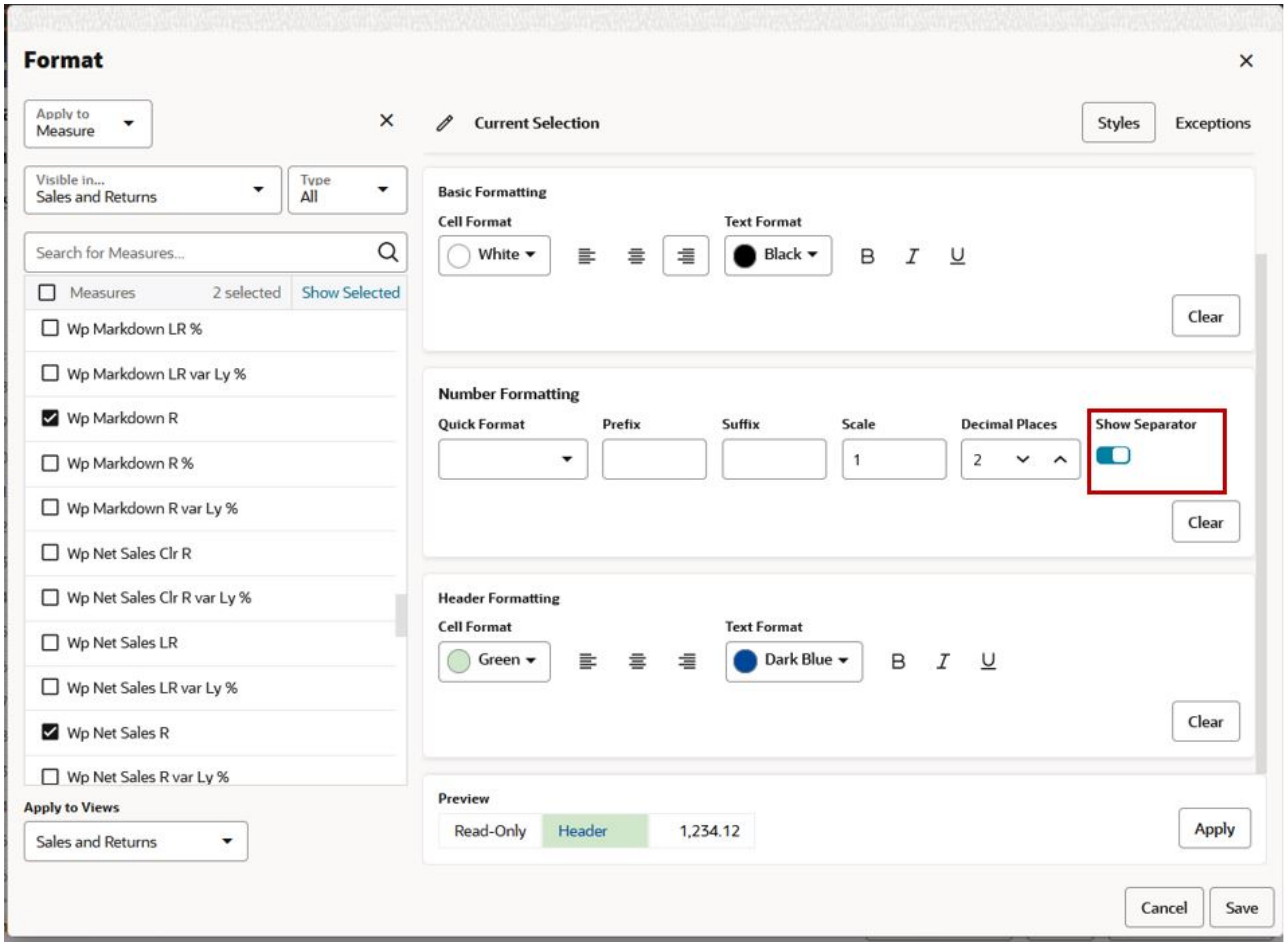
Figure 11-19 Show Separator for Thousands Setting



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 Filters in the Format Window" 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.

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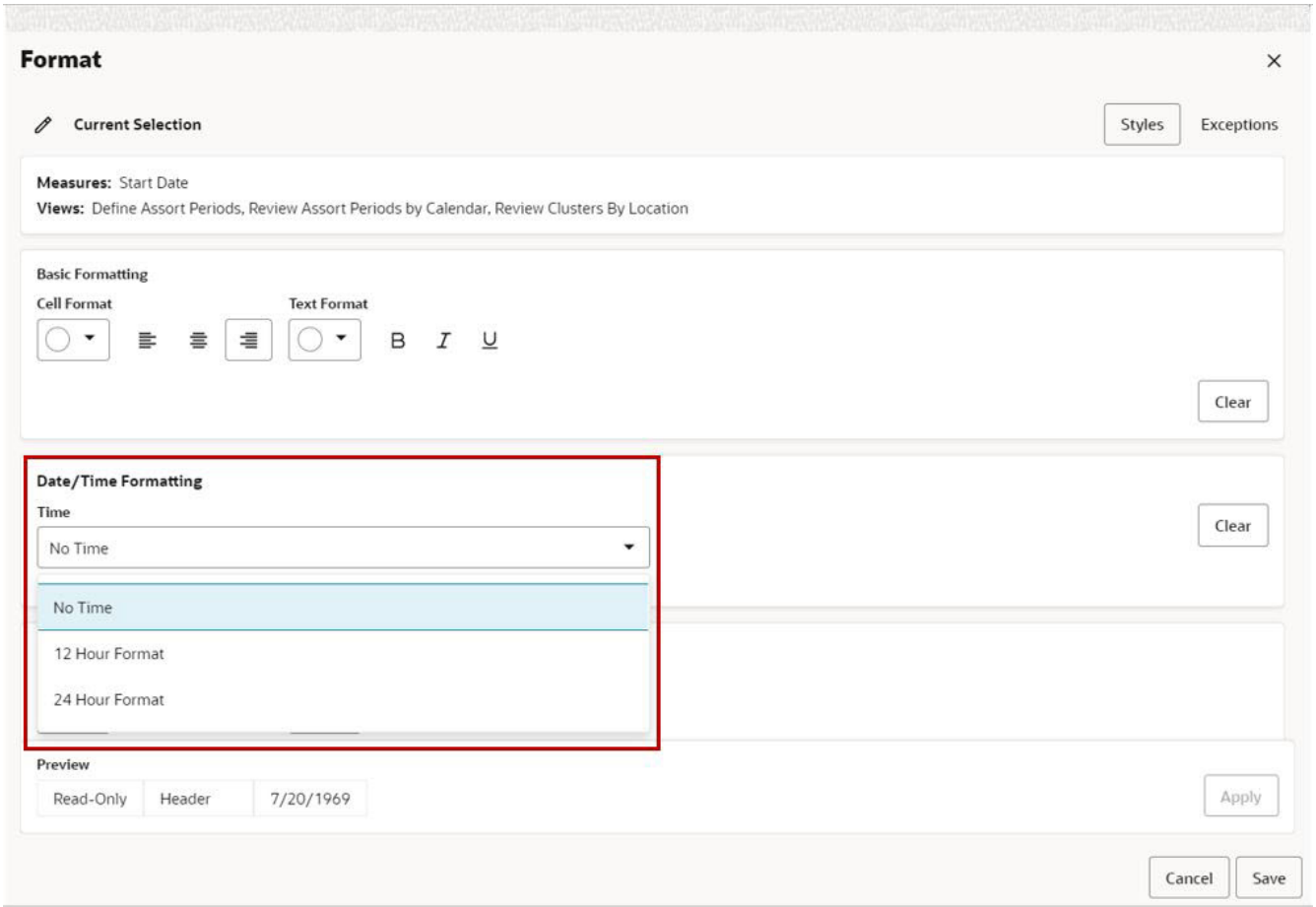
> **Note**
>
> The date and time format also can be changed across application using config properties by an Administrator. This feature allows an Administrator to change the date format across the pivot table, Admin dashboard, Recent Plans, and Last Committed Status. For more details, refer to the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

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

Figure 11-20 Time Formatting Field



Formatting Dimension Levels

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

Formatting for a dimension level can be applied to the header as well as to the cells of the dimension level. All of the configured levels of dimensions are available in the list.

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To apply the dimension level formatting, select the required dimension from the **Apply to** list and select the level of the dimension from the displayed list. Select the view to which you want to apply the dimension level 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 window for the required non-measure dimension by right- clicking the row or column dimension header and then selecting **Format**.

> **Note**
>
> In case the measure formatting and dimension level formatting overlap, the formatting is merged for the respective cell. For example, the Sales U cells are formatted with a **Green** color and it overlaps with the product department level cell formatting that is set as **Bold** and **Underline**. Then the overlapped cell displays the merged formatting of a **Green** cell background with **Bold** and **Underline** text.

Figure 11-21 Format Dimension

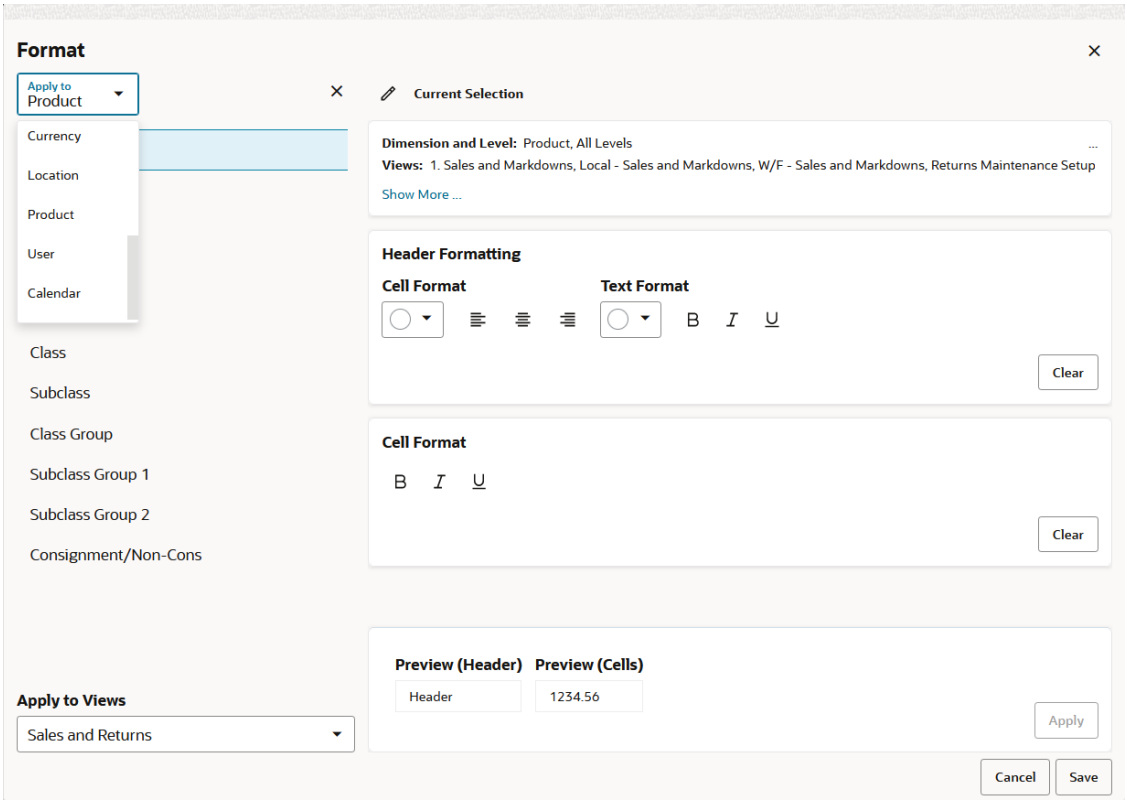

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Figure 11-22 Formatting Dimension Levels

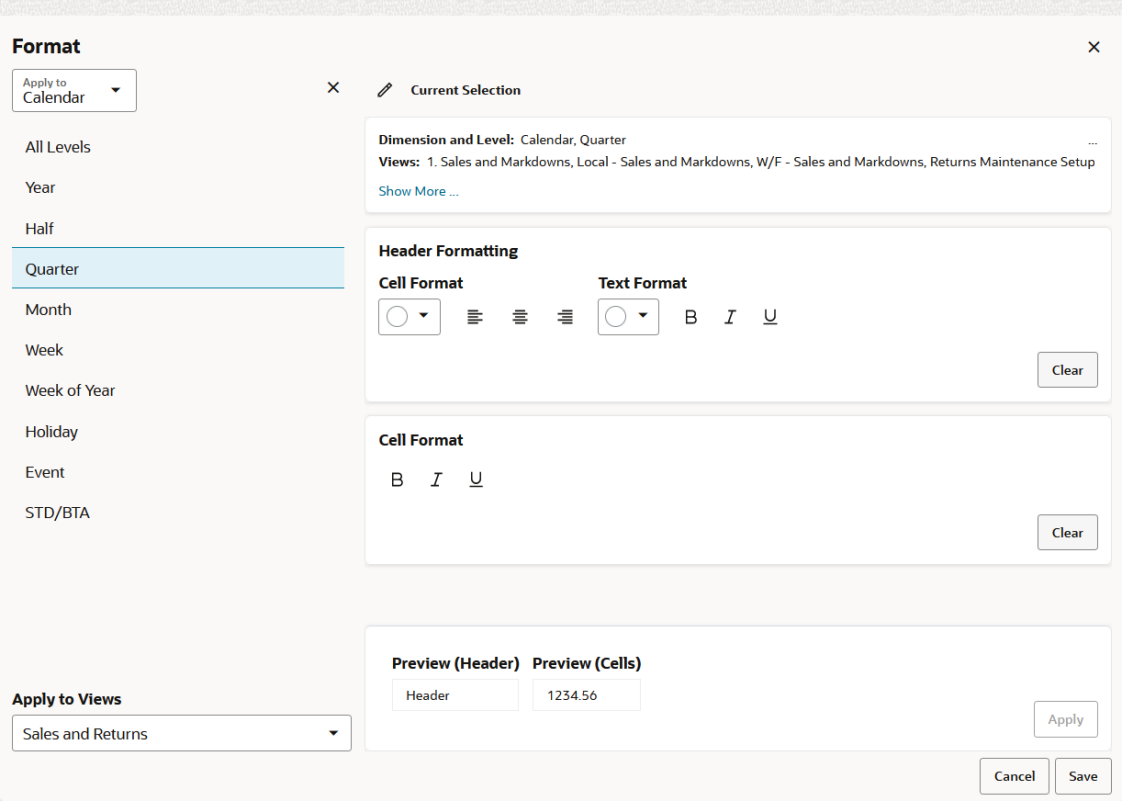

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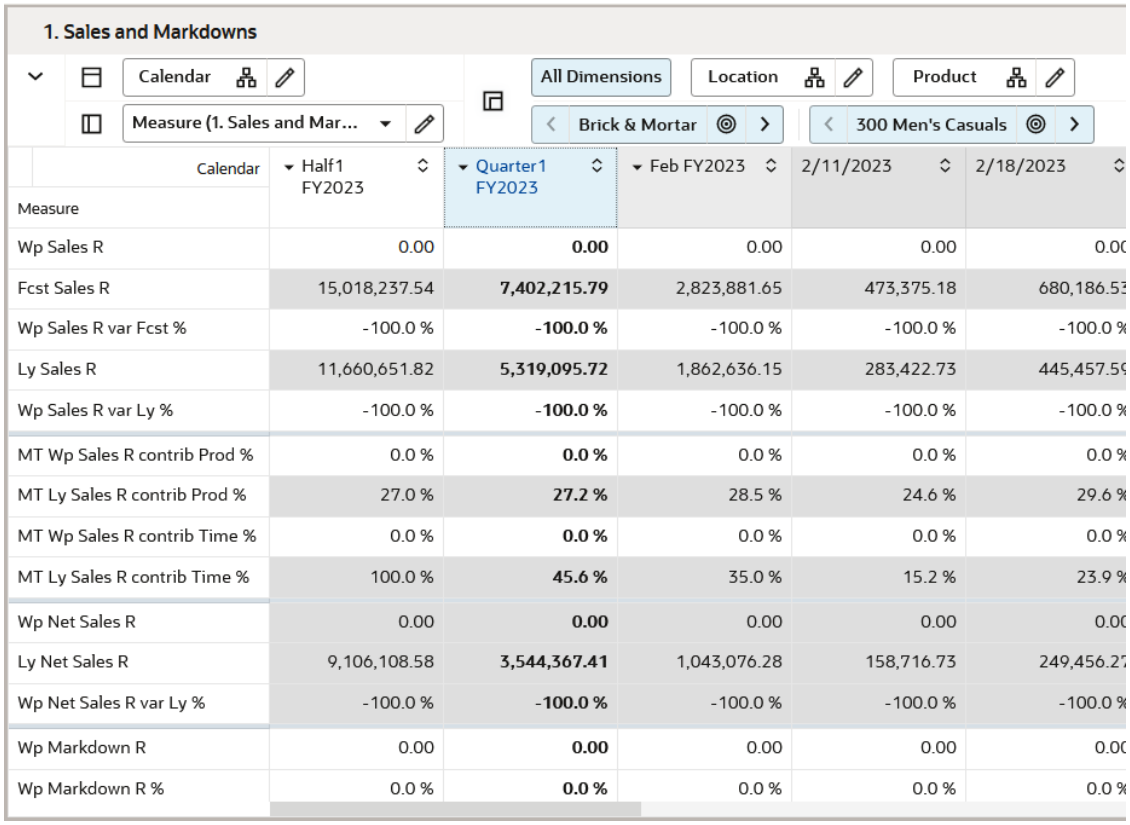
Figure 11-23 Formatting Calendar Level Example



Calendar / Measure	Half1 FY2023	Quarter1 FY2023	Feb FY2023	2/11/2023	2/18/2023
Wp Sales R	0.00	**0.00**	0.00	0.00	0.00
Fcst Sales R	15,018,237.54	**7,402,215.79**	2,823,881.65	473,375.18	680,186.53
Wp Sales R var Fcst %	-100.0 %	**-100.0 %**	-100.0 %	-100.0 %	-100.0 %
Ly Sales R	11,660,651.82	**5,319,095.72**	1,862,636.15	283,422.73	445,457.59
Wp Sales R var Ly %	-100.0 %	**-100.0 %**	-100.0 %	-100.0 %	-100.0 %
MT Wp Sales R contrib Prod %	0.0 %	**0.0 %**	0.0 %	0.0 %	0.0 %
MT Ly Sales R contrib Prod %	27.0 %	**27.2 %**	28.5 %	24.6 %	29.6 %
MT Wp Sales R contrib Time %	0.0 %	**0.0 %**	0.0 %	0.0 %	0.0 %
MT Ly Sales R contrib Time %	100.0 %	**45.6 %**	35.0 %	15.2 %	23.9 %
Wp Net Sales R	0.00	**0.00**	0.00	0.00	0.00
Ly Net Sales R	9,106,108.58	**3,544,367.41**	1,043,076.28	158,716.73	249,456.27
Wp Net Sales R var Ly %	-100.0 %	**-100.0 %**	-100.0 %	-100.0 %	-100.0 %
Wp Markdown R	0.00	**0.00**	0.00	0.00	0.00
Wp Markdown R %	0.0 %	**0.0 %**	0.0 %	0.0 %	0.0 %

> **Note**
>
> In the Format dialog, the Dimensions drop-down list only shows dimensions that appear in at least one view in the workbook.
>
> - Once a dimension is selected, it only shows the levels that appear in at least one of the Apply To Views.
> - When there is no level available for the selected dimension within Apply to View, the system displays this message, *Dimension is not used in any of the Apply to Views*. The **Apply** and **Clear** buttons are unavailable.

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 window, 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.

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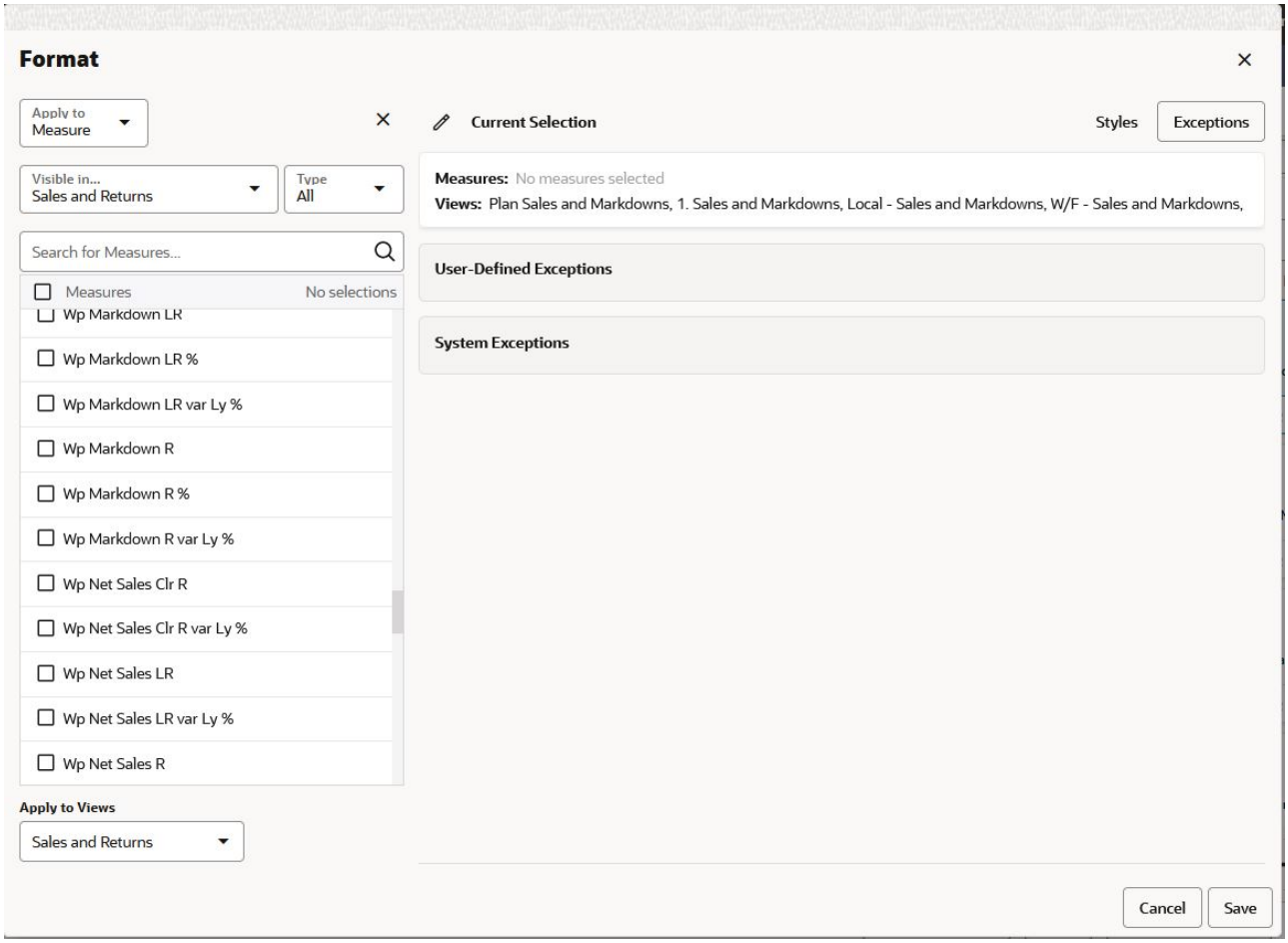
Numeric Exception Formatting

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

1. In the Format window, 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 Filters in the Format Window" for more details.

Figure 11-24 Exception Tab for Number Formats



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

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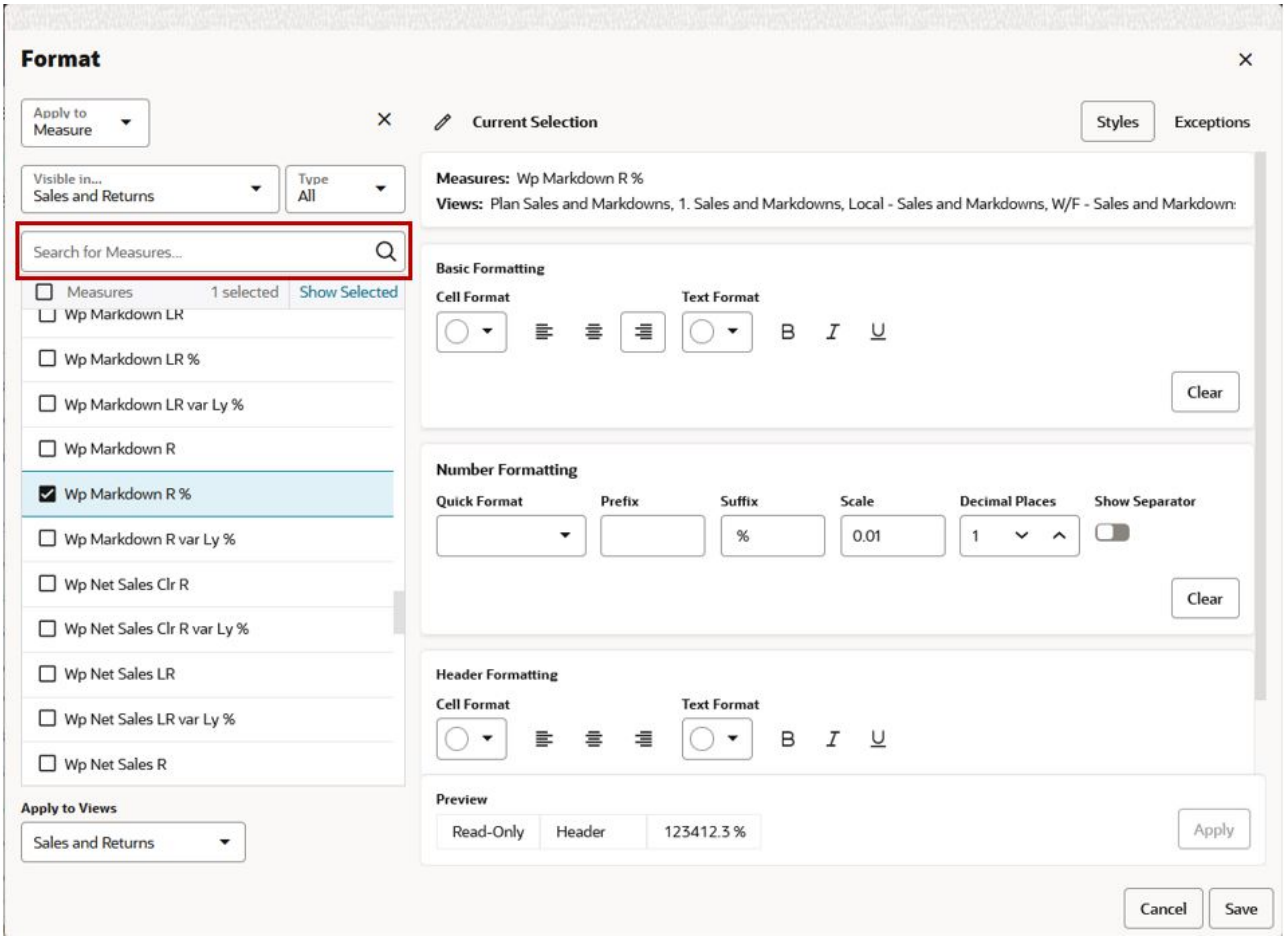
Figure 11-25 Search for Measure to Alter



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. You can move the measure selections to the Exception tab.
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 apply one of the following conditions at a time:
   - **Less Than or Equal**: Use this to select values that are less than or equal to a value specified by a user.
   - **Greater Than or Equal**: Use this to select values that are greater than or equal to a value specified by a user.
   - **Equals**: Use this to select values equal to a specific value entered by user.
   - **Greater Than**: Use this to select values that are greater than a value specified by a user.
   - **Less Than**: Use this to select values that are less than a value specified by the a user.
   - **Between**: Use this to select values between two values specified by a user.

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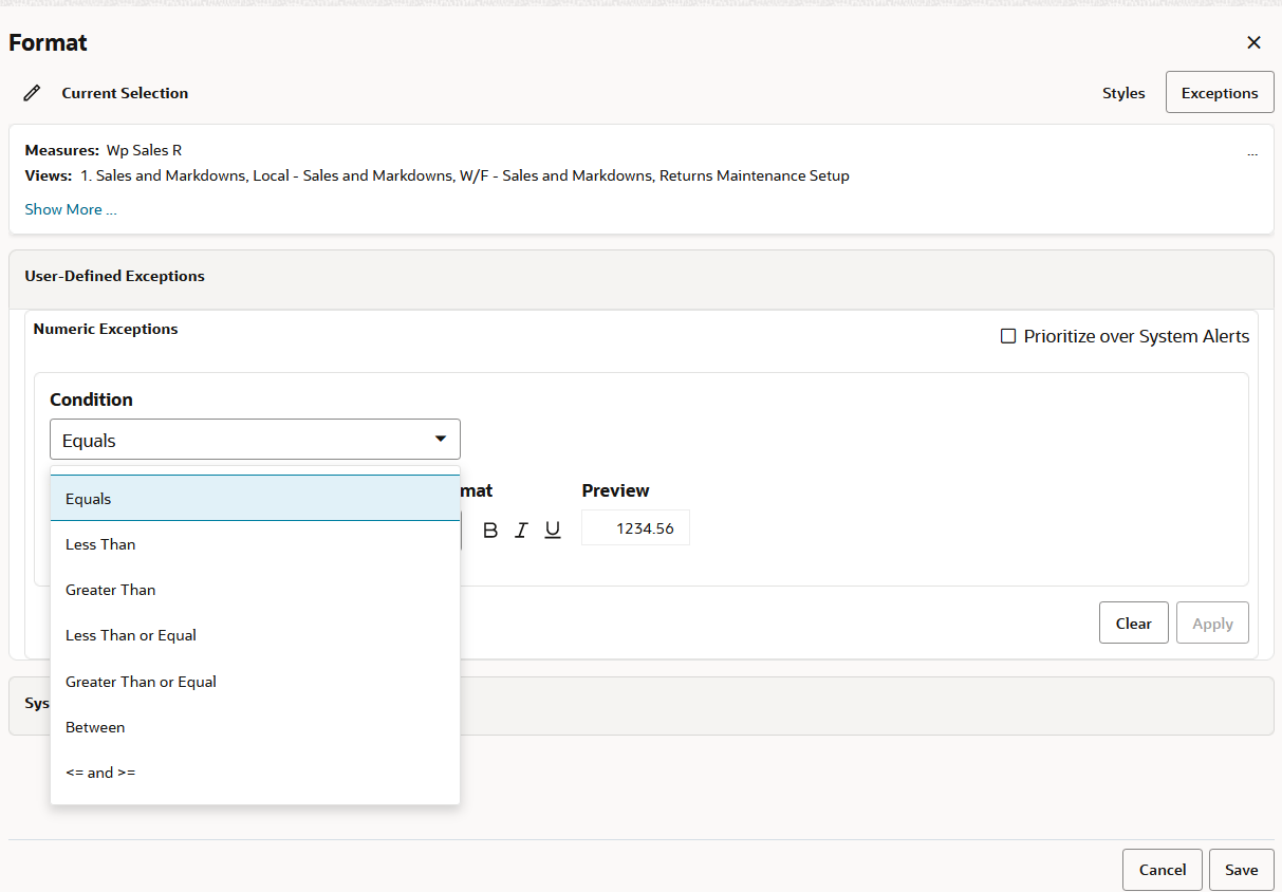
- **<=AND>=**: Use this to highlight values that are not between two values specified by a user.

> **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 11-26 Exception Condition Values



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

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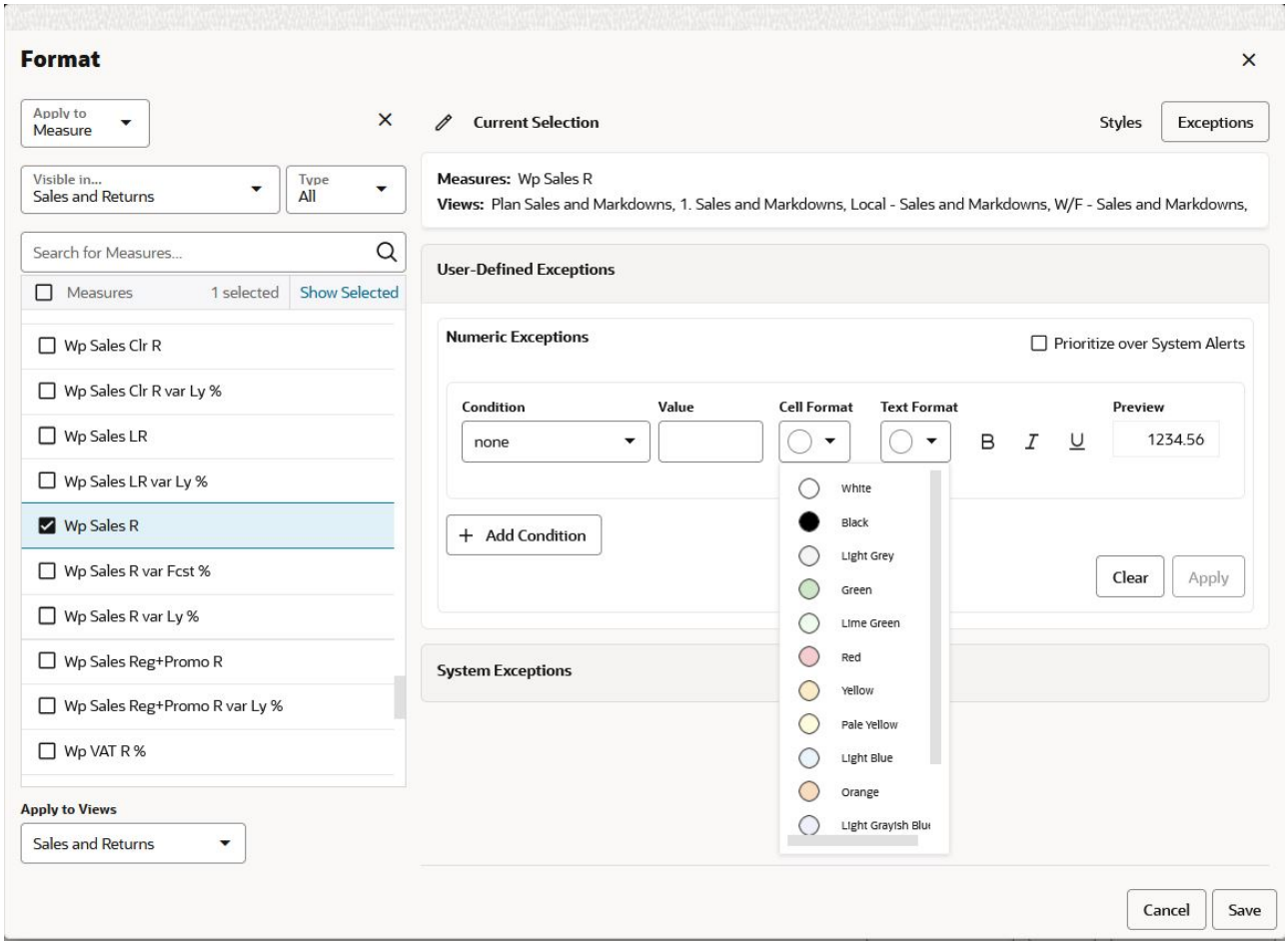
Figure 11-27 Cell Format Settings



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

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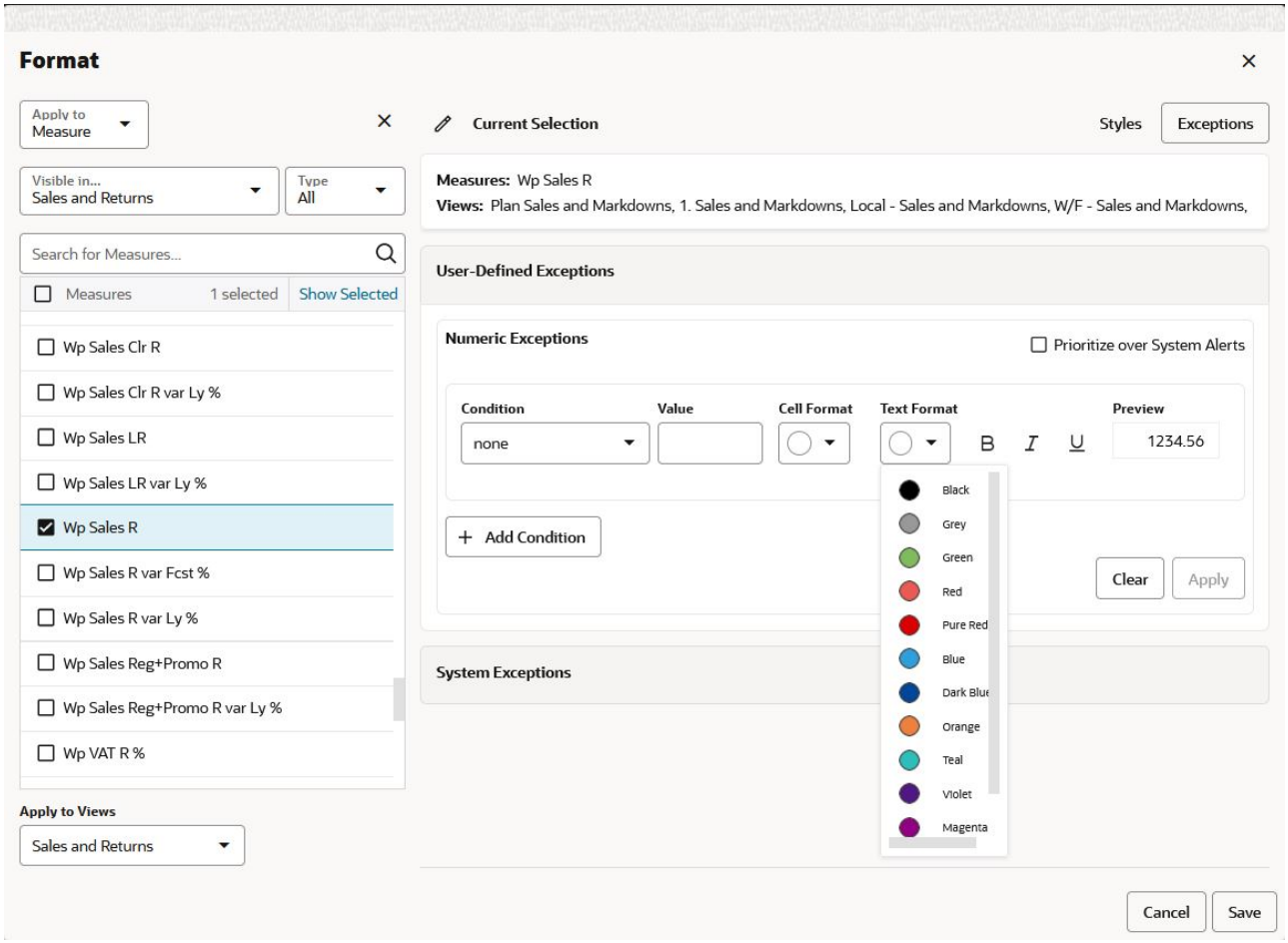
Figure 11-28 Text Format Fields



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

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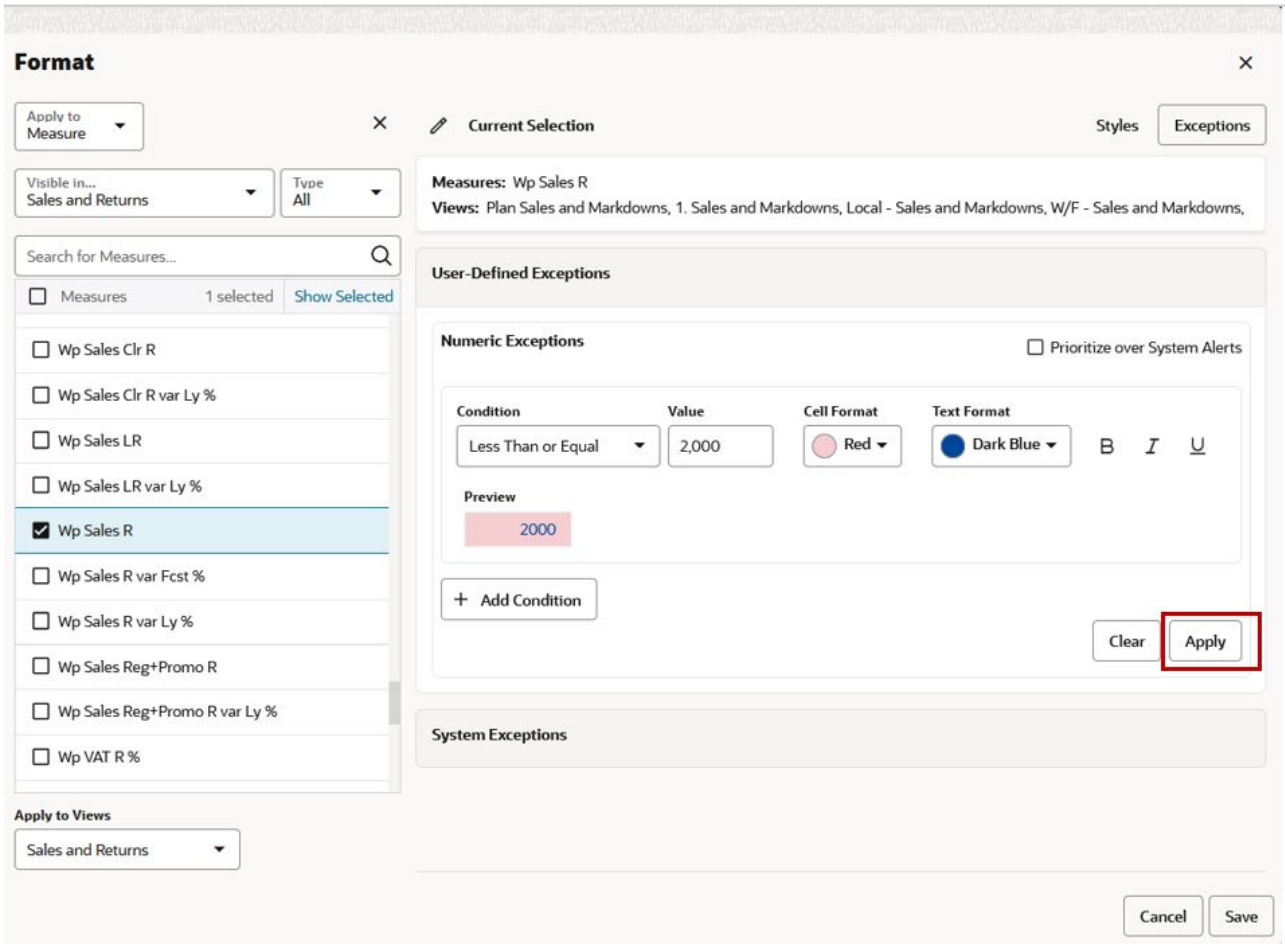
Figure 11-29 Apply Format Exception



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

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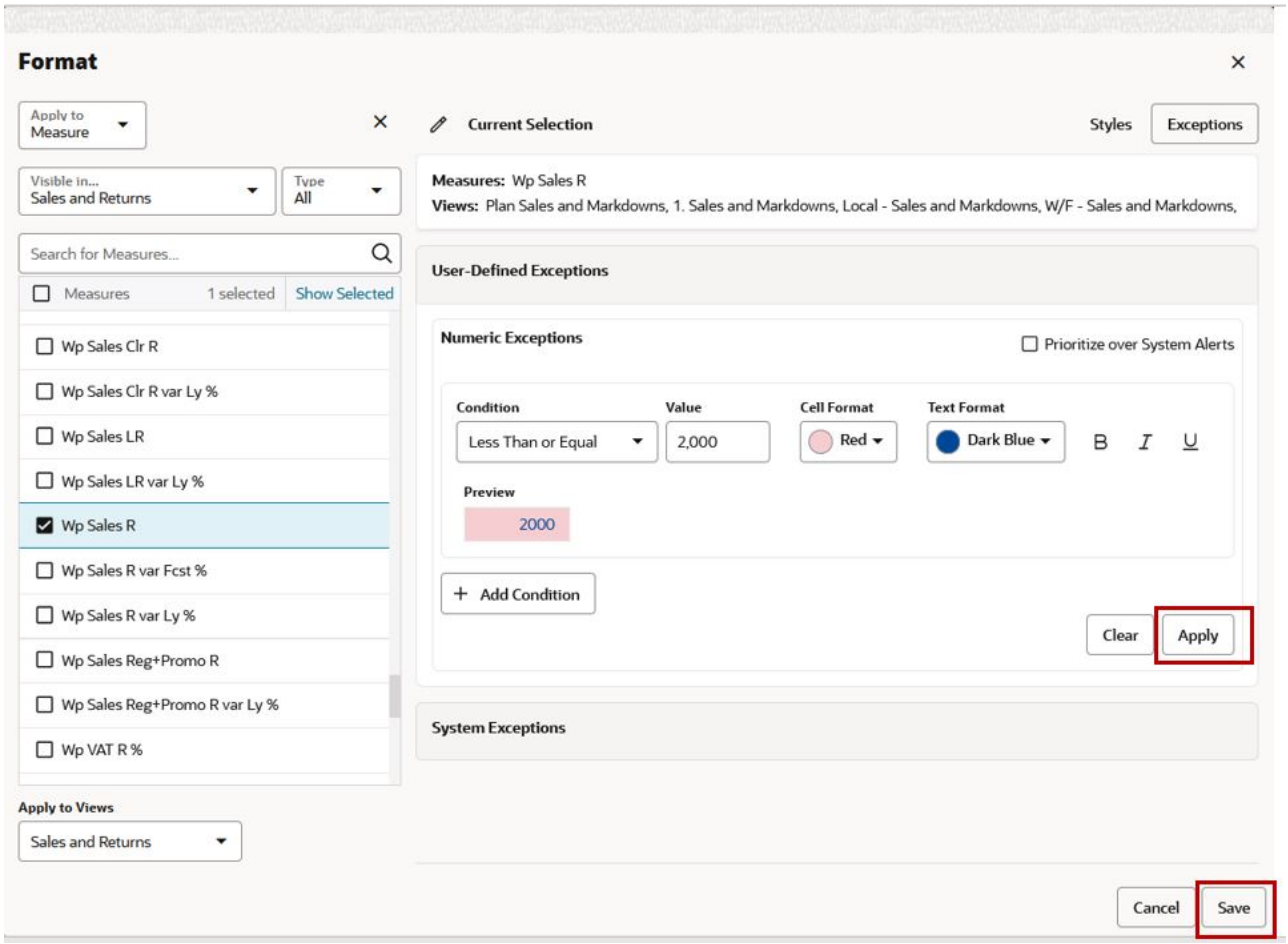
Figure 11-30 Apply and Save Formats



Boolean Exception Formatting

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

1. In the Format window, 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 Filters in the Format Window" for more details.

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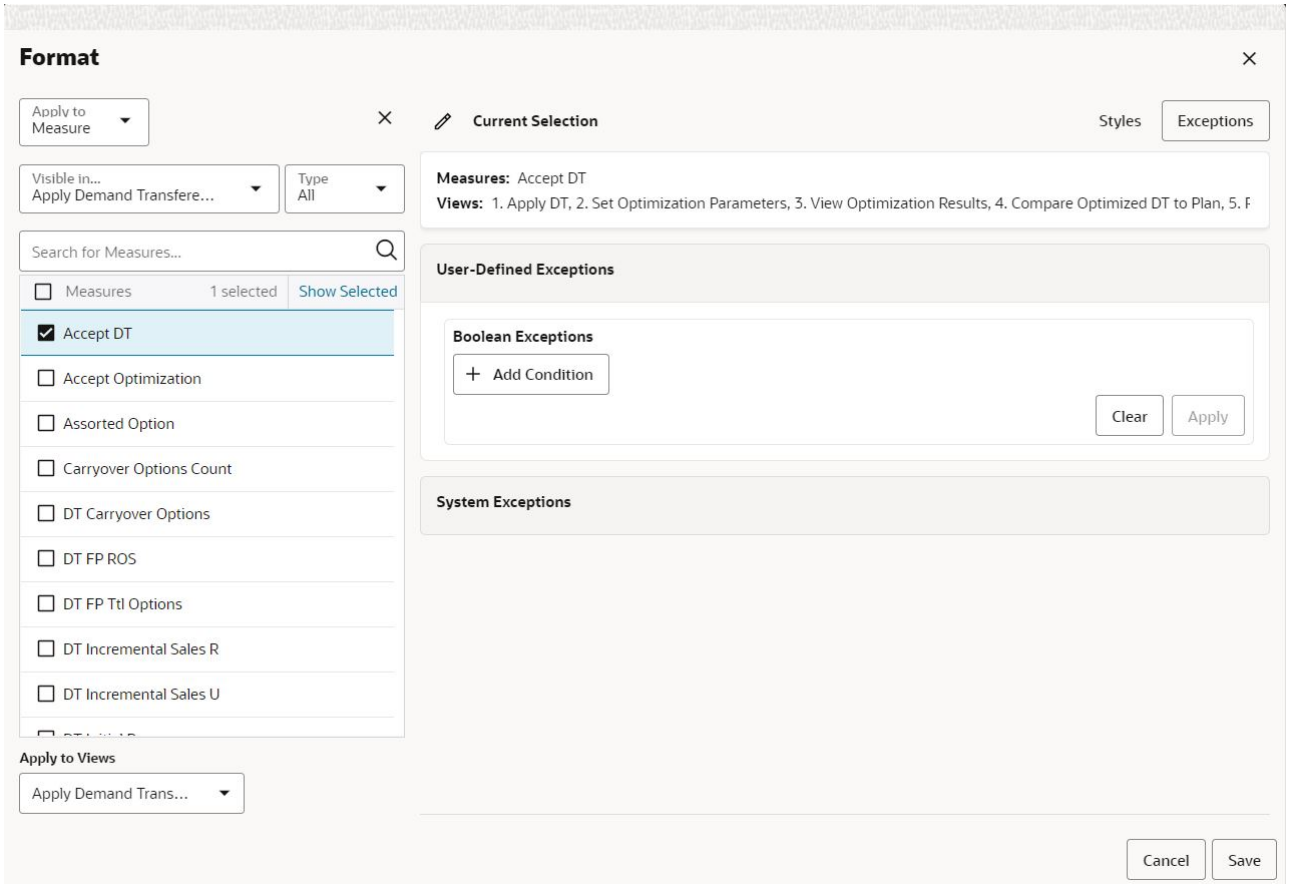
Figure 11-31 Boolean Exception Tab for Formatting



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

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Figure 11-32 Filter Measure for Exception

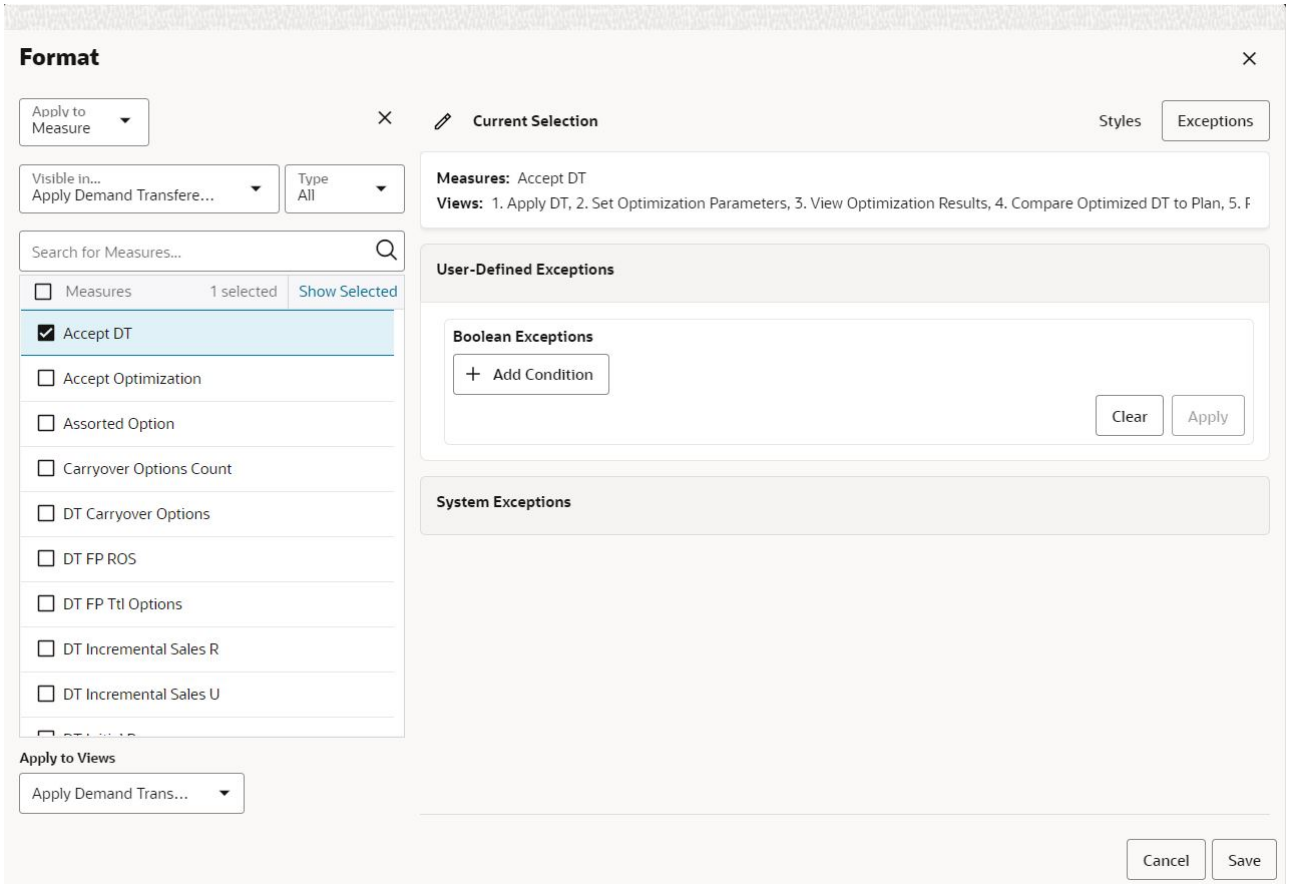

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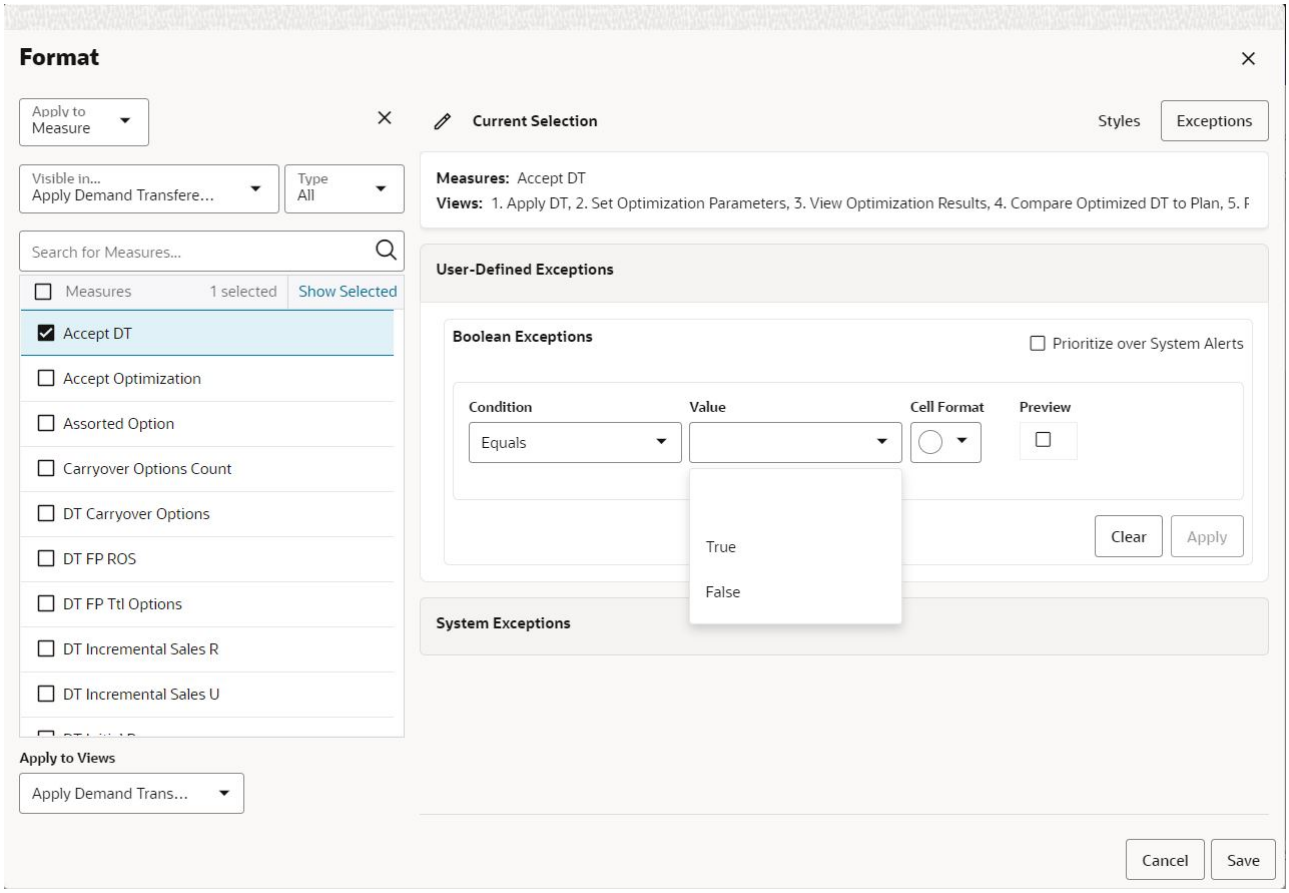
Figure 11-33 Add User-Defined Boolean Exception



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

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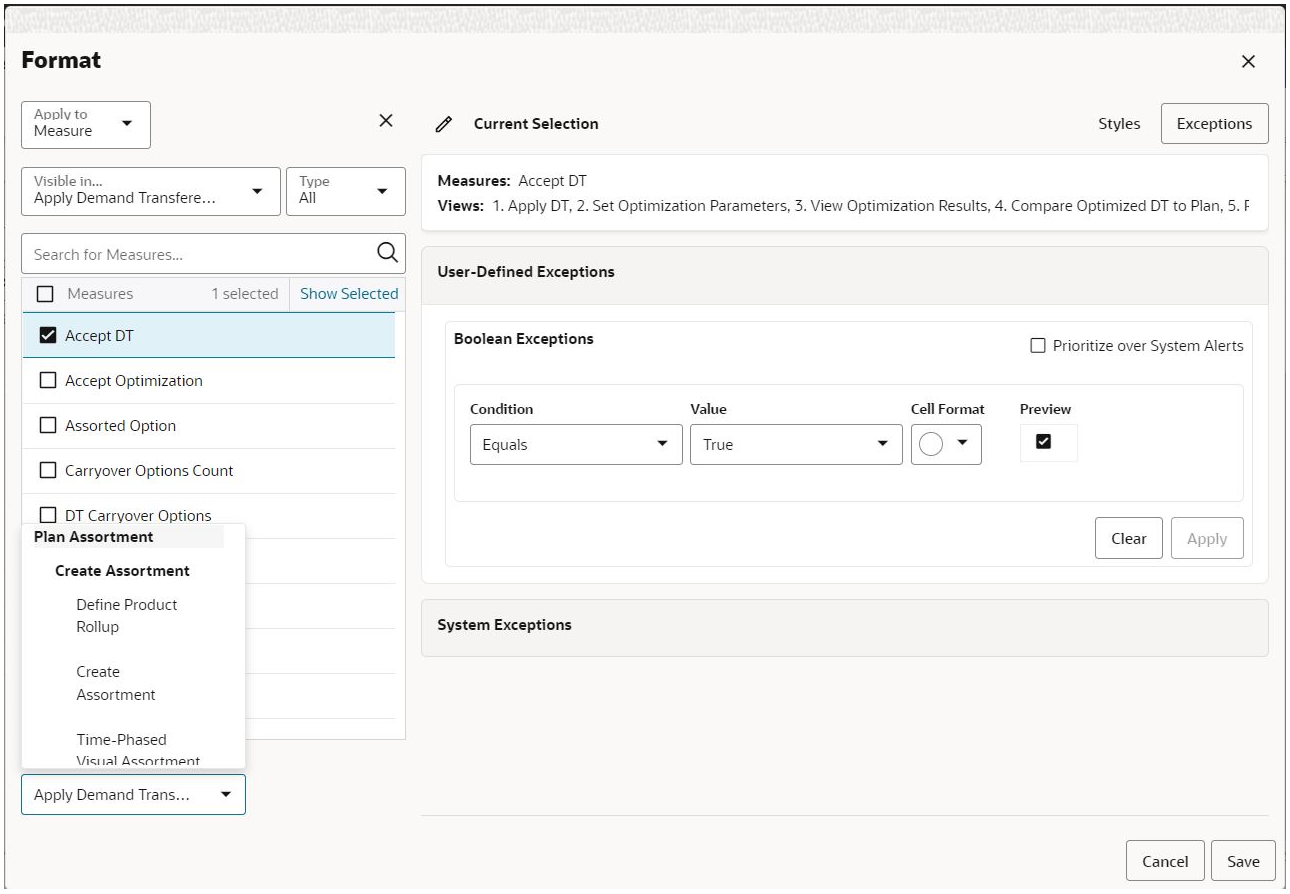
Figure 11-34 Applies To Field for Boolean Exception



4. Click the current selection to hide the selection panel.
5. You can see the summary of your selection under Measures and Views. Click **Show More** or **Show Less** to see the selection criteria. You can move the measure selections to the Exception tab.
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 these 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.

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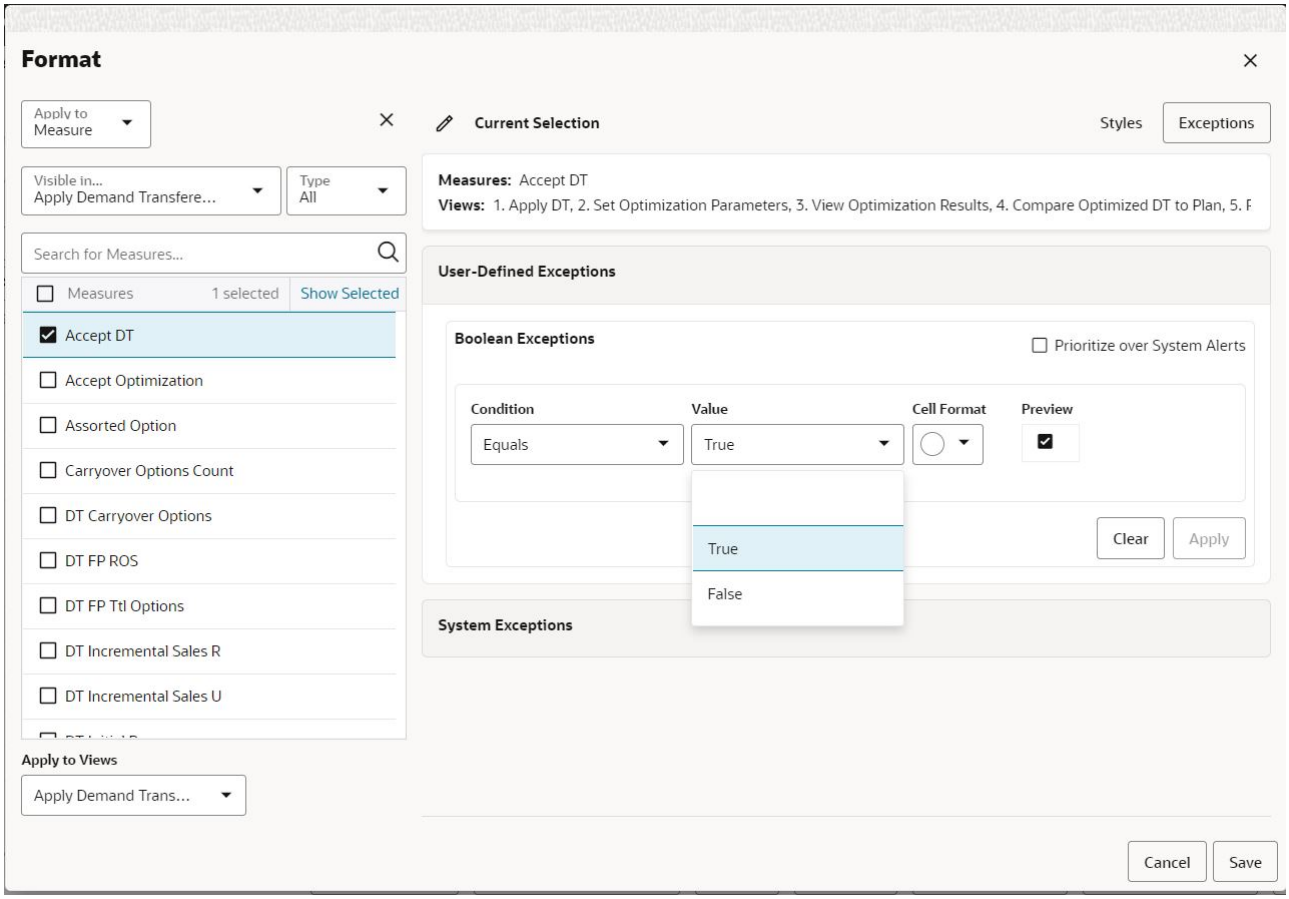
Figure 11-35 Boolean Exception Condition Value



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

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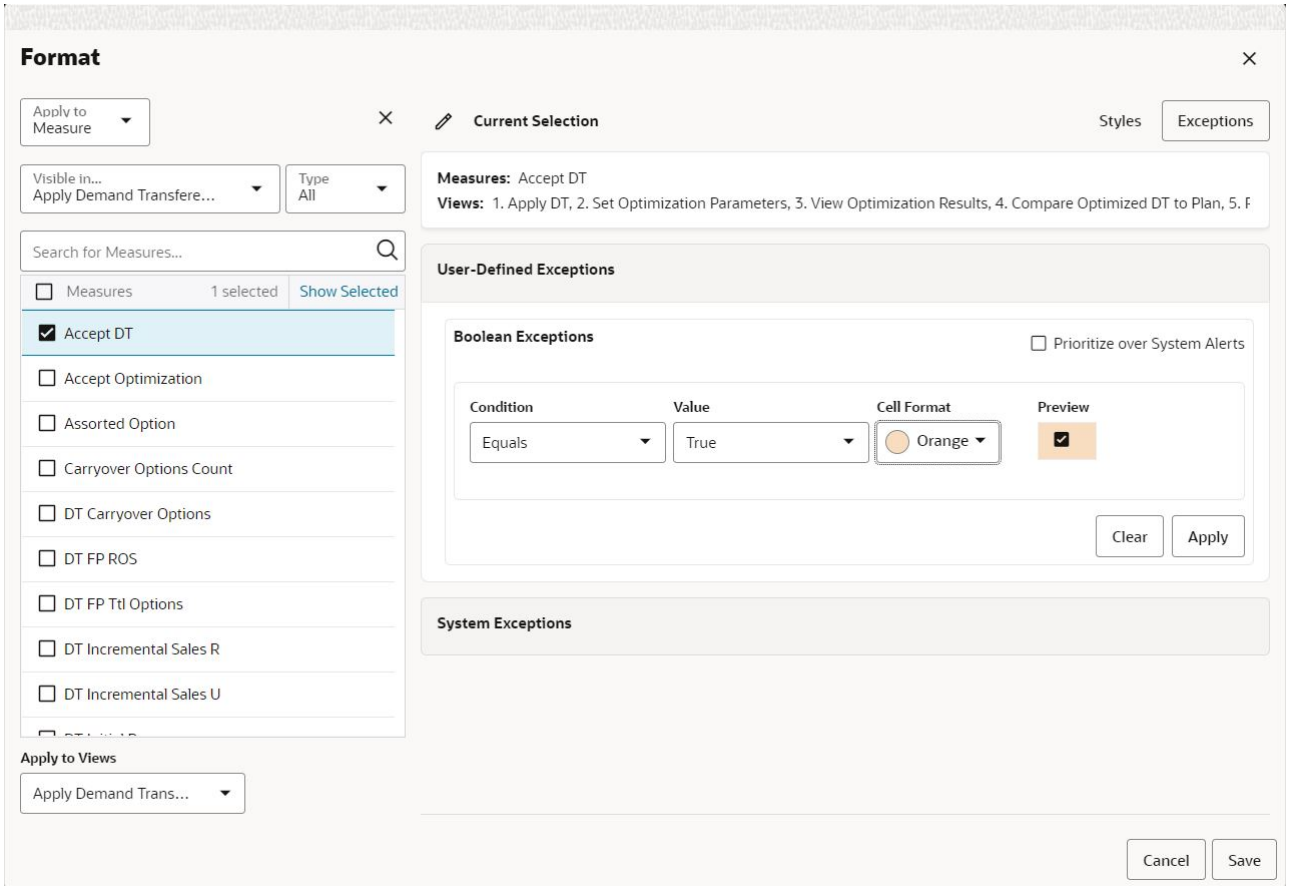
Figure 11-36 Boolean Exception Cell Format



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

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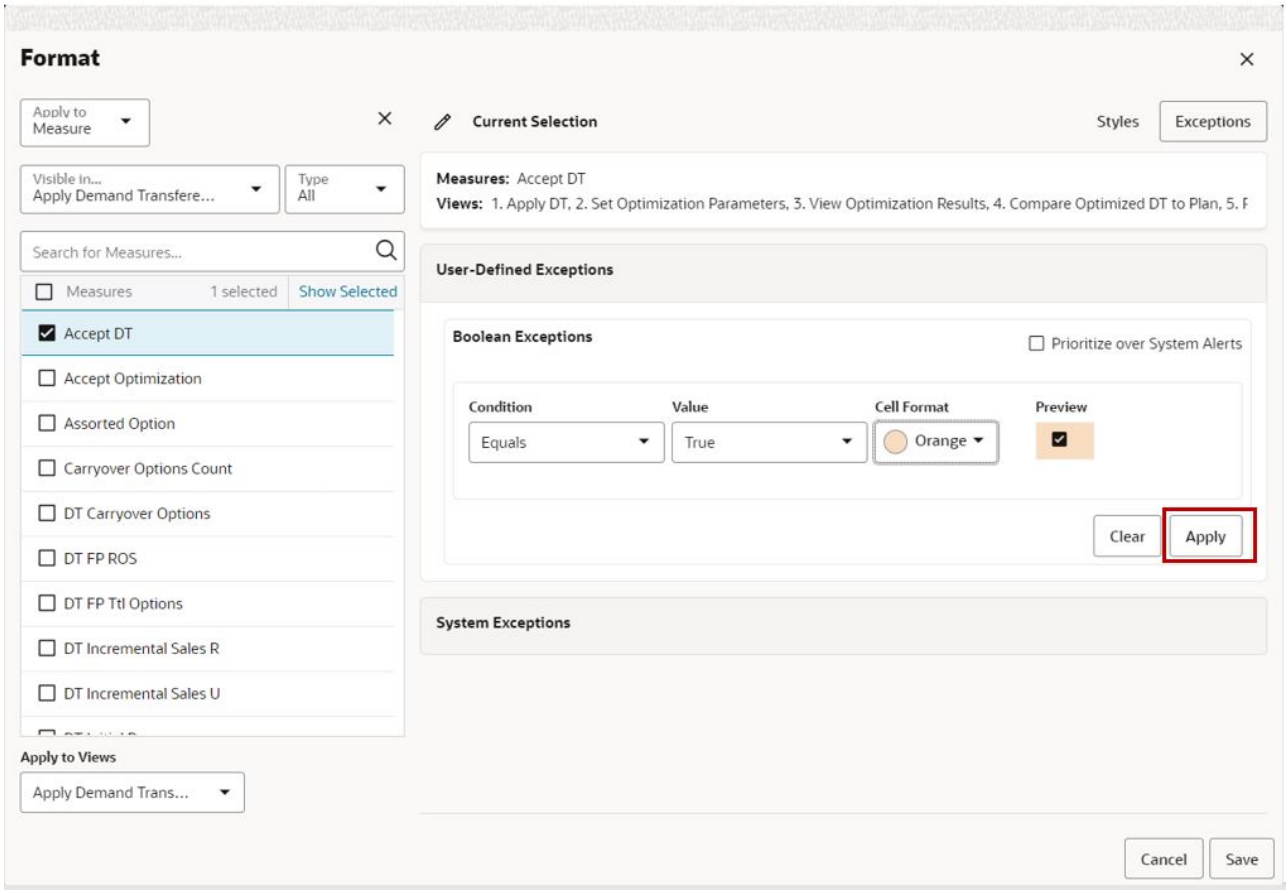
Figure 11-37 Apply Boolean Exception



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

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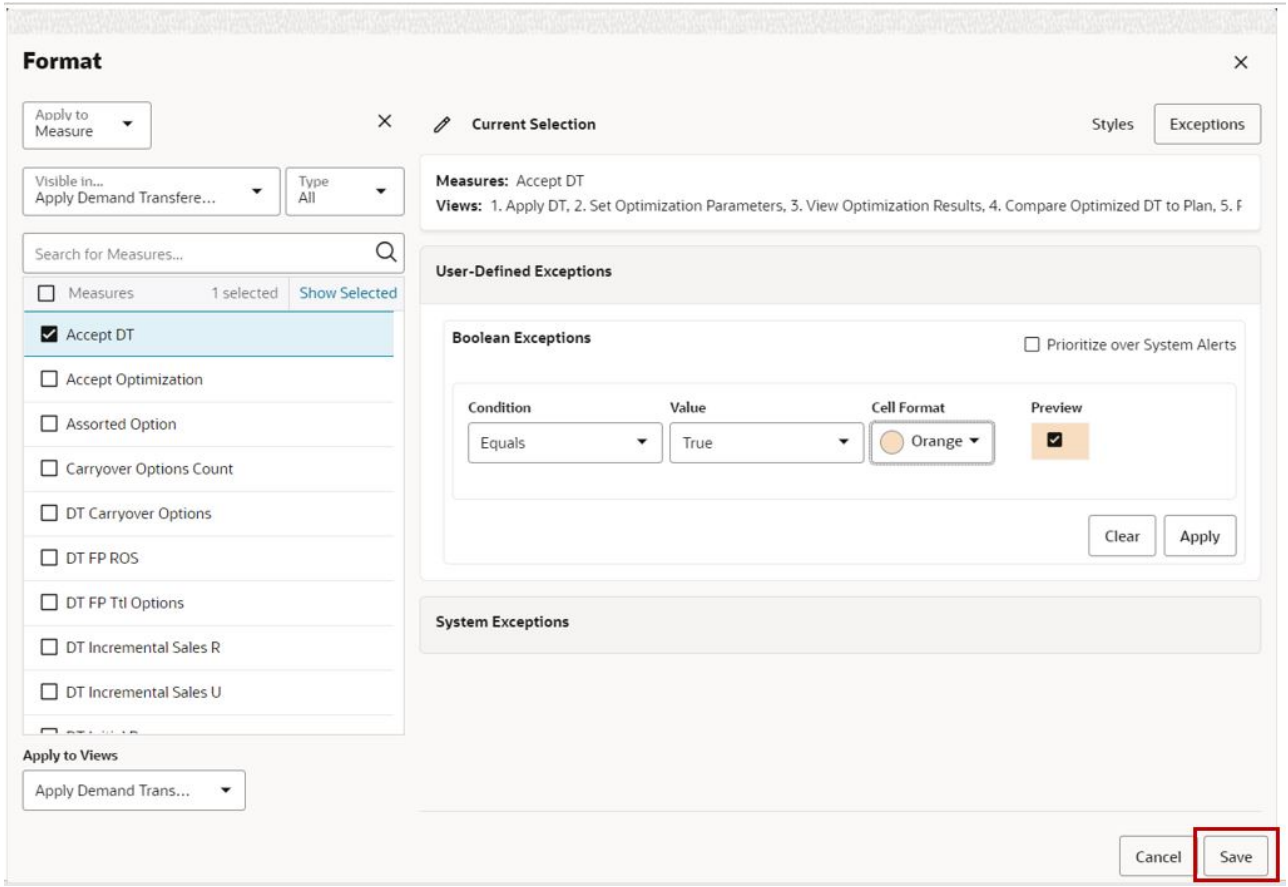
Figure 11-38 Apply and Save Boolean Exceptions



Saving Formats

When you make changes in Format or Edit View and click **Apply** or **OK**, the format changes are saved for the current workspace only. All other changes to the workspace, including view changes or additions, view layout changes, changes to dimension tile layouts on the axes, changes to visible and hidden measures, aggregation rollups, text size, 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.

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- 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
- Synchronize Z-axis
- Top filters selection
- Card layout (large card versus small card)
- Text Size (X-small, Small, Medium, Large, X-Large)

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 workspace can potentially be deleted (or is not upgradeable), only committed data 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.

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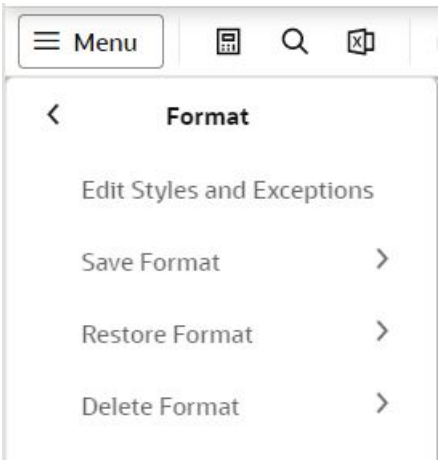
> **Note**
>
> Save Formats only applies saved formats to newly created workspaces. Workspaces that are already created do not adopt these saved format changes

To save formats, complete the following steps:

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

Figure 11-39 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.

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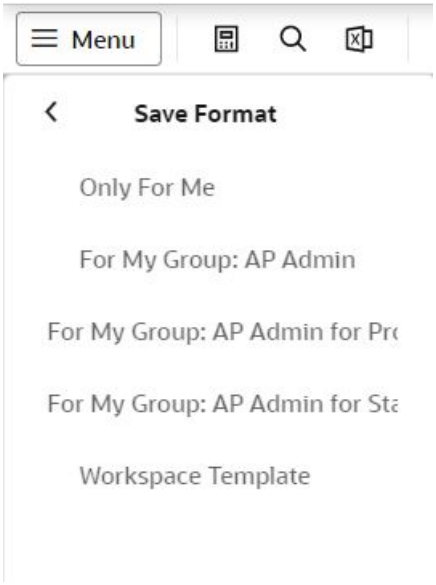
Figure 11-40 Format Level for Saving Format



> **Note**
>
> Business Administration needs to set up Workspace Template formatting that includes the appropriate aggregated dimension levels, charts, or other visual changes that differ from the configuration. This enables increases user adoption and can be easily copied for patch update and domain copies. Admin may update their Workspace Templates as business needs require with changes to measure profiles, new views, and so on. Configuration changes that include new measures, new views, new tabs/ steps may require an update to the existing formats to ensure that these modifications are included appropriately.

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.

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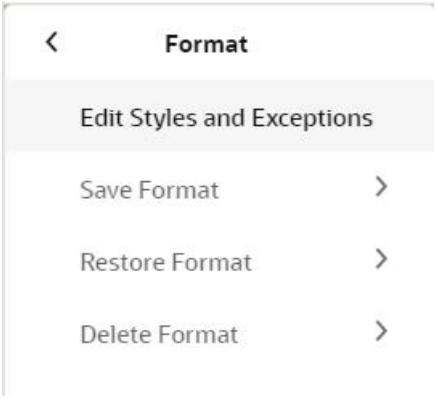
> **Note**
>
> Delete Format only deletes the saved formats that apply to newly created workspaces. Workspaces that are already created do not lose any previously applied saved formats. If you do not want to see deleted formatting changes in an already saved workspace, then you should restore the format of the Groups or Workspace Template.

To delete formats, complete the following steps:

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

Figure 11-41 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.

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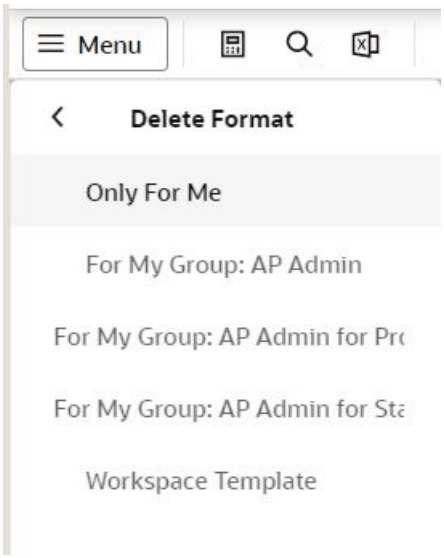
Figure 11-42 Delete Format Options



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**.

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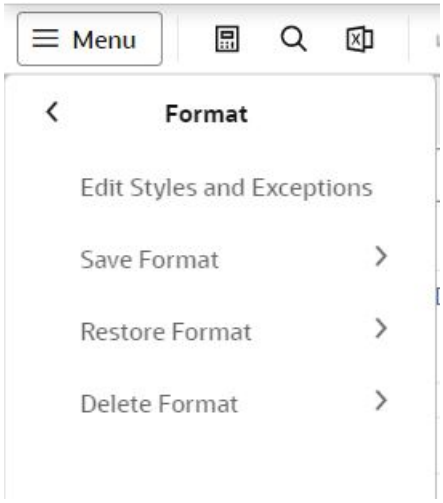
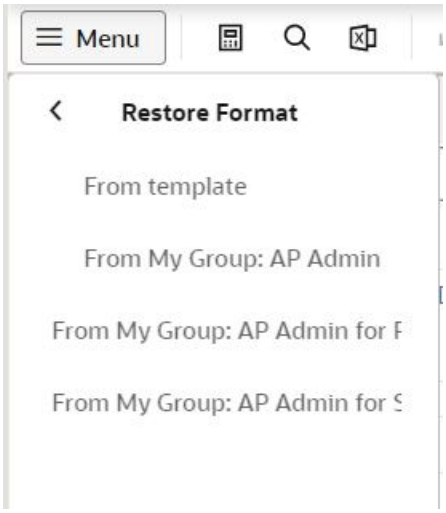
Figure 11-43 Restore Format



2. Select one of the following Restore Format to options:
   - **Groups**: 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 11-44 Restore Format Options



You can restore formatting from other groups without re-building the workspace. To inherit the formatting from other group, you can use the **Restore** format option and select the respective group format.

In case you belong to multiple user groups, the formatting inherited to the new workspace is the formatting applied to the default group format. To apply formatting from other than your default group, you can select the **Restore** formatting option.

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12
Export

When you use an RPASCE solution, you can export data in the current slice of a view or across all slices of a view. Data from current slice of a view can be exported to Microsoft Excel or to a text file. You can also print it. You can also export the chart views as pivot table to Microsoft Excel or to a text file. Data from all slices of the current view can be exported to a **.csv** file or to an Excel file with each slice becoming a separate tab in the Excel workbook. As part of this functionality, you can adjust the page setup options before exporting the data. These default settings are set in the RPASCE for the selected view.

Export Current Slice

If you want to export the data of the view you are currently working on, use the current slice option. This allows you to export the data from the current slice into an Excel or a text file. You can export attributes displayed on the pivot table along with the data. You can also include images and choose the required format types.

For Example: If you are working on a view called Determine # of Options for Subclass A and Cluster A/Humid/Conservative, the export option for current slice here allows you to export all the visible positions on the view for the chosen Subclass and Cluster.

Export All Slices

If you want to export the data of the view of all the positions you are currently working on, use the **All Slices** option. This allows you to export the data from all the slices of the view you are currently working on to an Excel file or a **.csv** file format. If you choose to export all slices of data into an Excel file, each slice becomes a separate tab in the Excel workbook. The current limitations of Excel on the maximum rows and columns holds good here as well. If you are working with large amounts of data beyond the Excel limits, use the **.csv** file format to export data from the views. If special filters are enabled, then the current slice data will be exported based on the filters. Any other manual changes done on the current slice will not be exported. You can export attributes displayed on the pivot table along with the data. You can also include image URLs and choose the required format types. This export runs in the background, and you are notified on completion.

For Example: If you are working on a view called Determine # of Options for Subclass A and Cluster A/Humid/Conservative and if there are 15 more clusters hidden in the XZ-Axis, the export option for All slices here allows you to export all the data for all 15 clusters for subclass A.

The Export option is located from the Quick Access Tool Bar menu, as shown in Figure 12-1.

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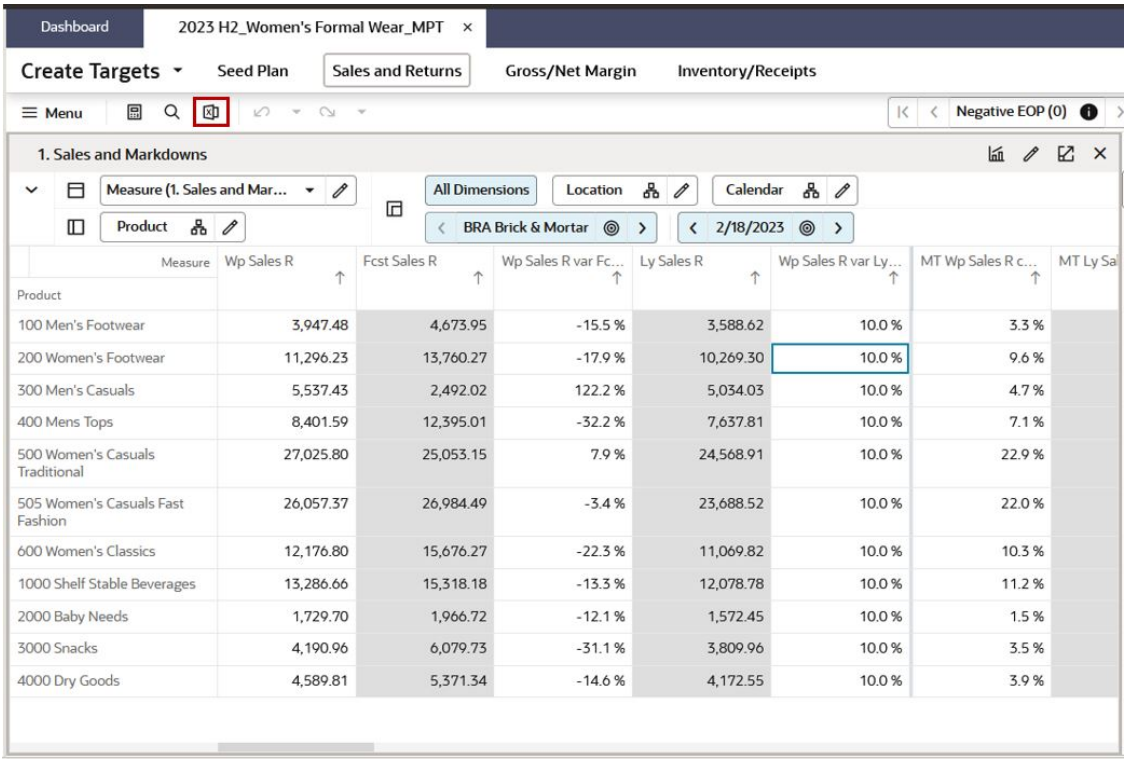
Figure 12-1 Export Option



Product	Wp Sales R	Fcst Sales R	Wp Sales R var Fc...	Ly Sales R	Wp Sales R var Ly...	MT Wp Sales R c...	MT Ly Sa
100 Men's Footwear	3,947.48	4,673.95	-15.5 %	3,588.62	10.0 %	3.3 %	
200 Women's Footwear	11,296.23	13,760.27	-17.9 %	10,269.30	10.0 %	9.6 %	
300 Men's Casuals	5,537.43	2,492.02	122.2 %	5,034.03	10.0 %	4.7 %	
400 Mens Tops	8,401.59	12,395.01	-32.2 %	7,637.81	10.0 %	7.1 %	
500 Women's Casuals Traditional	27,025.80	25,053.15	7.9 %	24,568.91	10.0 %	22.9 %	
505 Women's Casuals Fast Fashion	26,057.37	26,984.49	-3.4 %	23,688.52	10.0 %	22.0 %	
600 Women's Classics	12,176.80	15,676.27	-22.3 %	11,069.82	10.0 %	10.3 %	
1000 Shelf Stable Beverages	13,286.66	15,318.18	-13.3 %	12,078.78	10.0 %	11.2 %	
2000 Baby Needs	1,729.70	1,966.72	-12.1 %	1,572.45	10.0 %	1.5 %	
3000 Snacks	4,190.96	6,079.73	-31.1 %	3,809.96	10.0 %	3.5 %	
4000 Dry Goods	4,589.81	5,371.34	-14.6 %	4,172.55	10.0 %	3.9 %	

Click **Export** to display the Export window.

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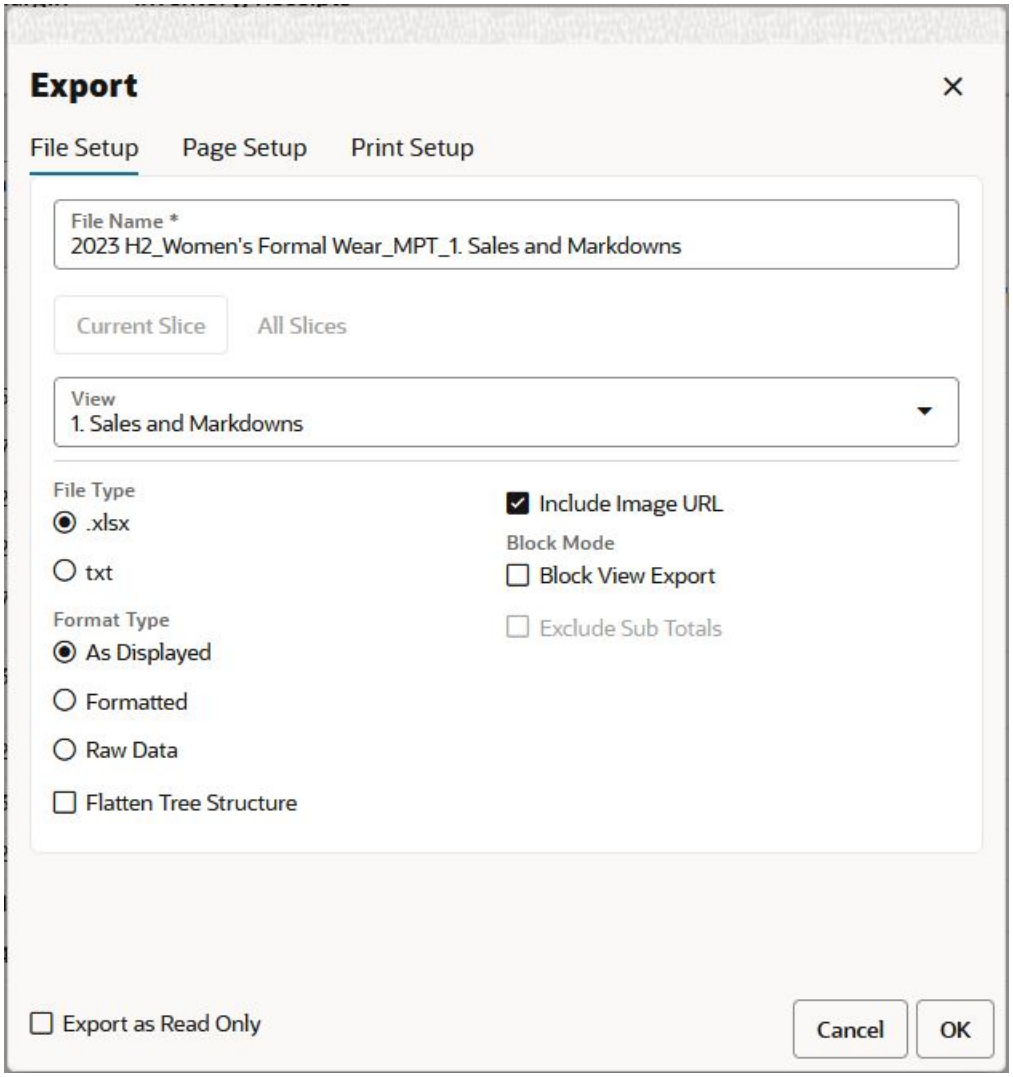
Figure 12-2 Export Window



The export window provides access to the following three tabs:

- File Setup
- Page Setup
- Print Setup

File Setup

You can 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 the following sections.

File Setup Options

Perform the following steps to set options.

1. Enter the file name. The exported file will have the file name you entered.

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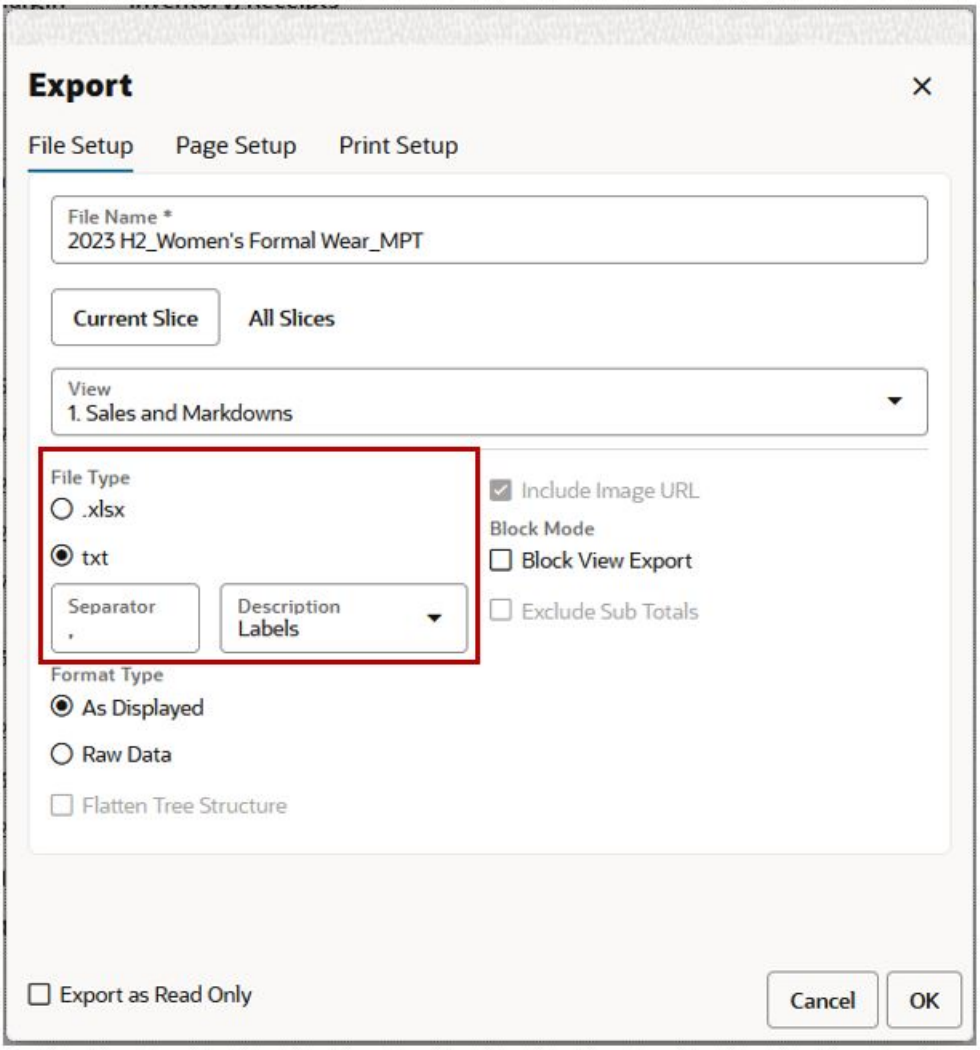
2. Select the view that you would like to export for the current slice.
3. Choose the file type for the exported file. File types are either Text or Microsoft Excel.
   - When you select Text, you see the options to select the Separator and the Description. The Description has two options:
     - **Labels:**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

Figure 12-3 Text File Type



   - When you select Microsoft Excel, you have access to the options Include Image URL, Format Type and Block Mode.

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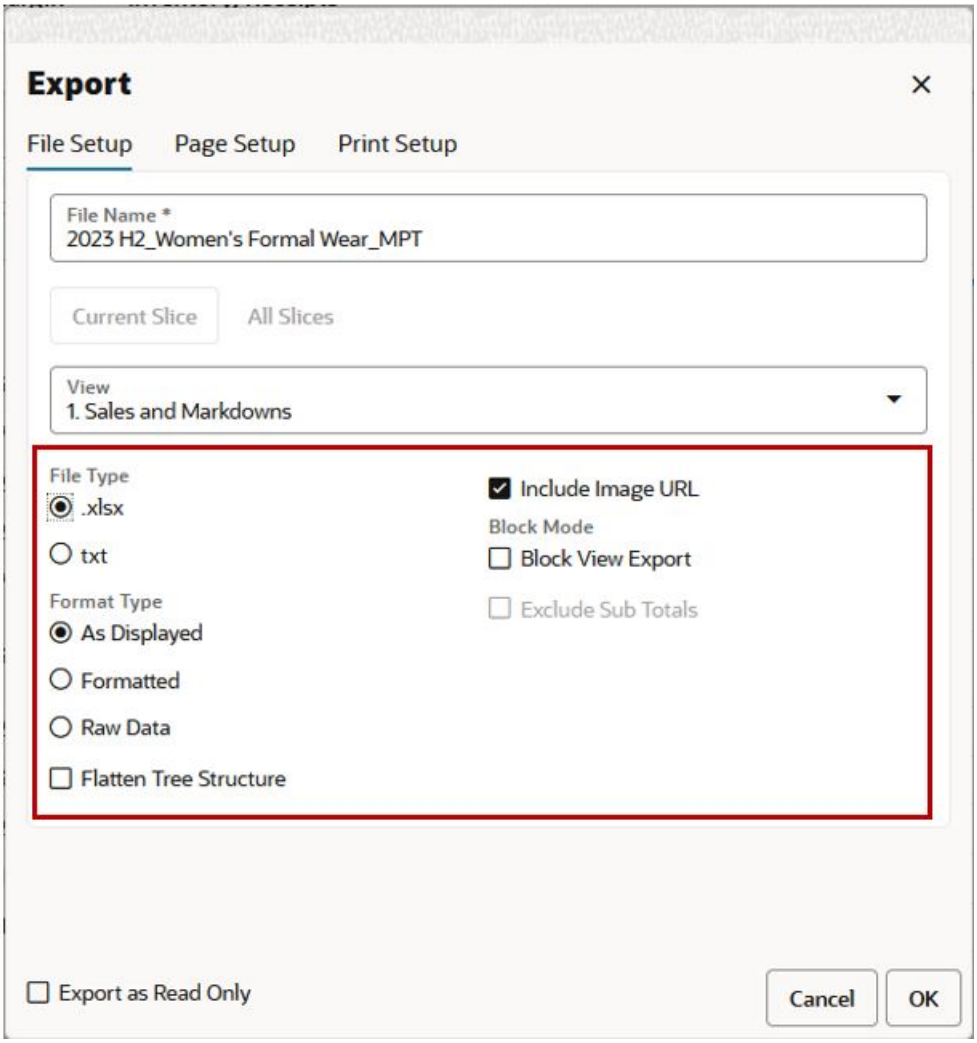
Figure 12-4 Excel File Type



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

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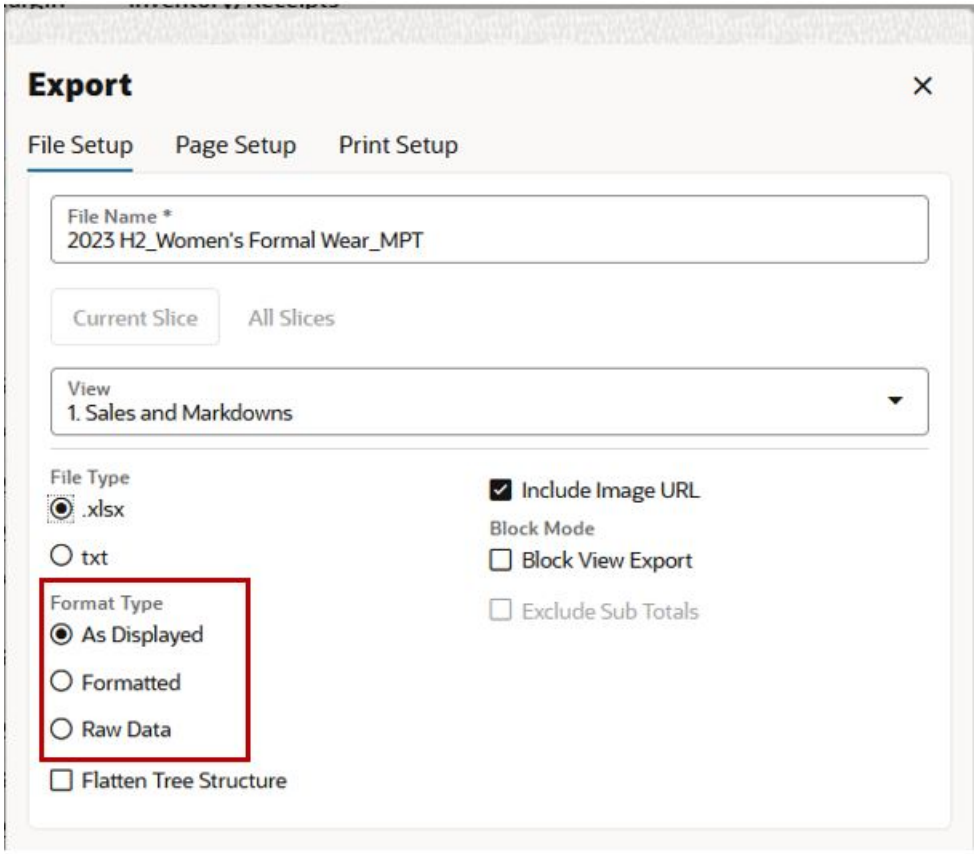

- **As Displayed:** the data is exported as it appears in the Content area.
- **Formatted:** the data is exported in raw format (that is, the RPASCE formatting has been removed) and the Excel-based formatting is automatically applied within Excel.

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

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

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

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

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> **Note**
>
> Data types other than integer and float are not supported. If a view contains columns with data types other than integer and float, the data is exported as it appears in RPASCE. If a workspace view contains a mix of columns with integer or float data types with other data types, the exported file contains the appropriate formatting for the supported data types based on the options selected during the export. Data in the columns of the unsupported data types appears as it is seen in RPASCE.
>
> Date or any type of picklists are exported as a string.
>
> Boolean data types are exported with formatting compatible with Excel.
>
> When you use the formatted option and use a scale factor of anything besides 1000, the value in Excel is displayed as the raw formatted value, not the scaled formatted value. For percentages, a scale factor of .01 displays as a percent in Excel.

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

5. The **Include Images URL** checkbox is selected by default. This allows you to export the URL of images present on the view such as product images, attribute images, measure images, along with other data.

   When you clear the **Include Images URL** checkbox, RPASCE does not export the image.

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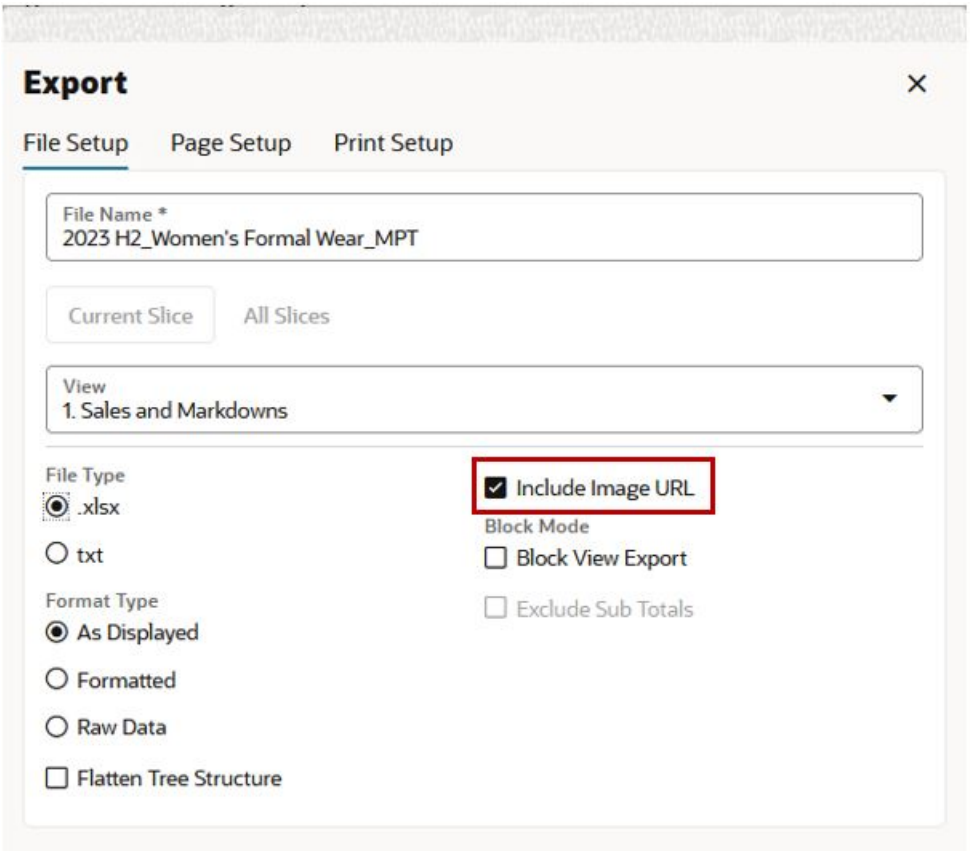
Figure 12-5 File Setup Include Images URL



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

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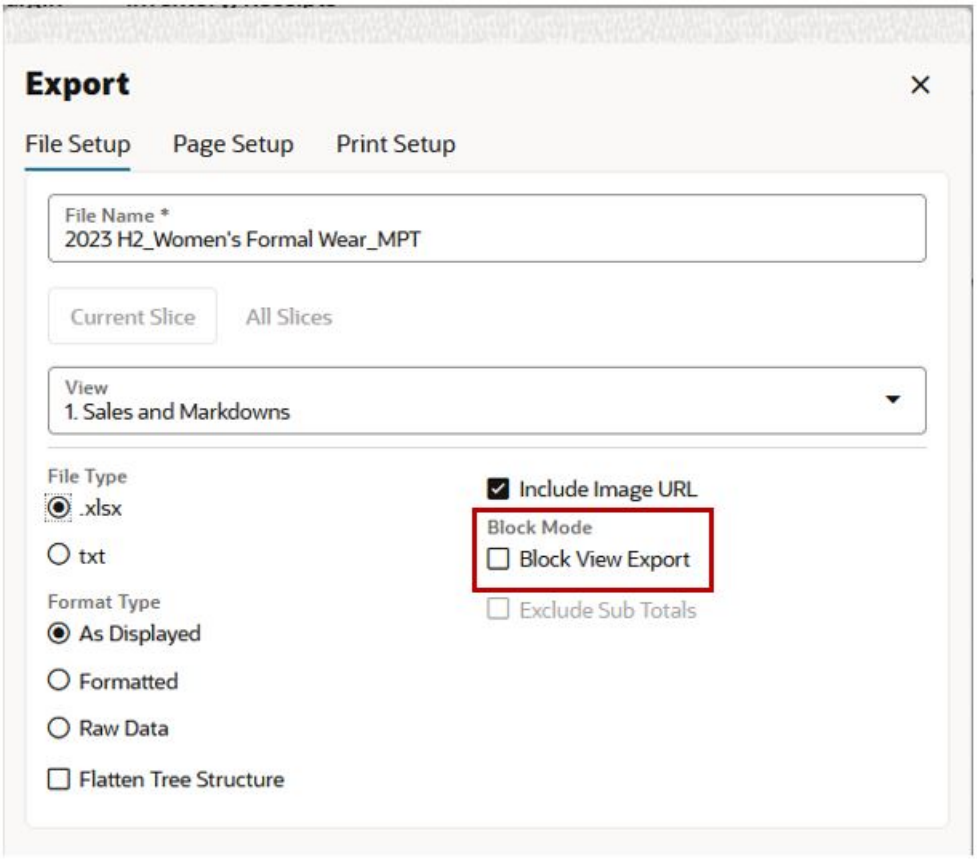
Figure 12-6 Block View Export Option



7. Select the Exclude Sub Totals option to remove the rows with sub-total values of the parent level hierarchy in the export file. This option is enabled only when **Block View Export** is checked. You can export the file with block view and excluding sub-total in both **.xlsx** or **.txt** formats.

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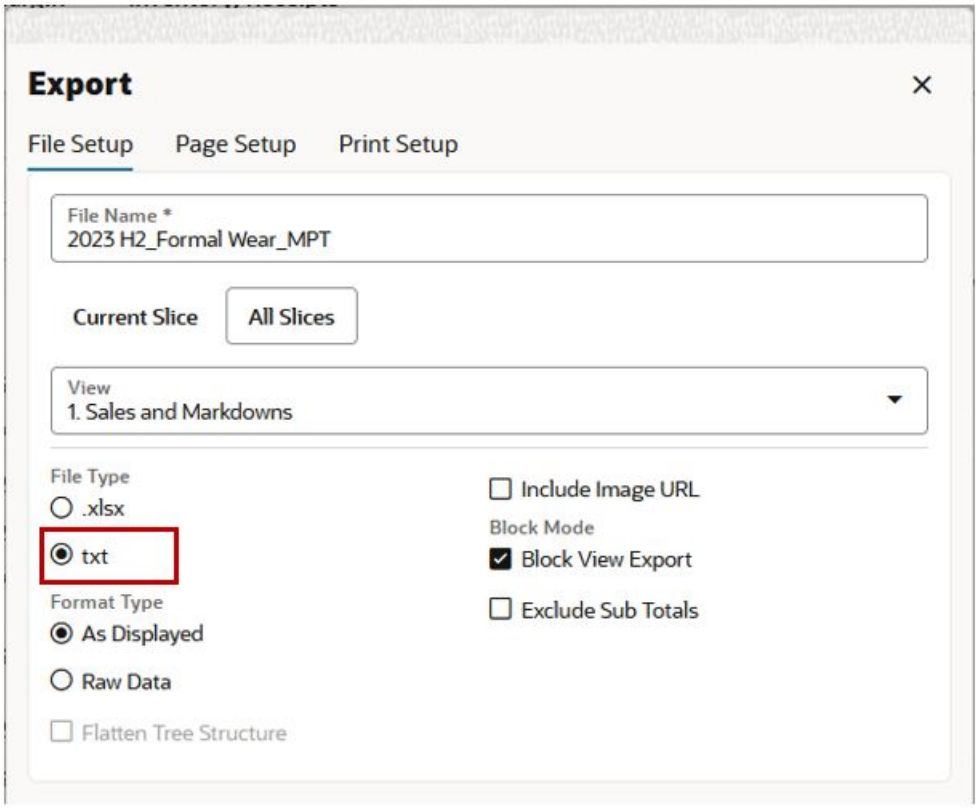
Figure 12-7 Export Block View Exclude Sub-totals



8. Select the **Flatten Tree Structure** option to remove the space added before the parent position labels in the export output file. This option is only available when exporting to an **.xlsx** file.

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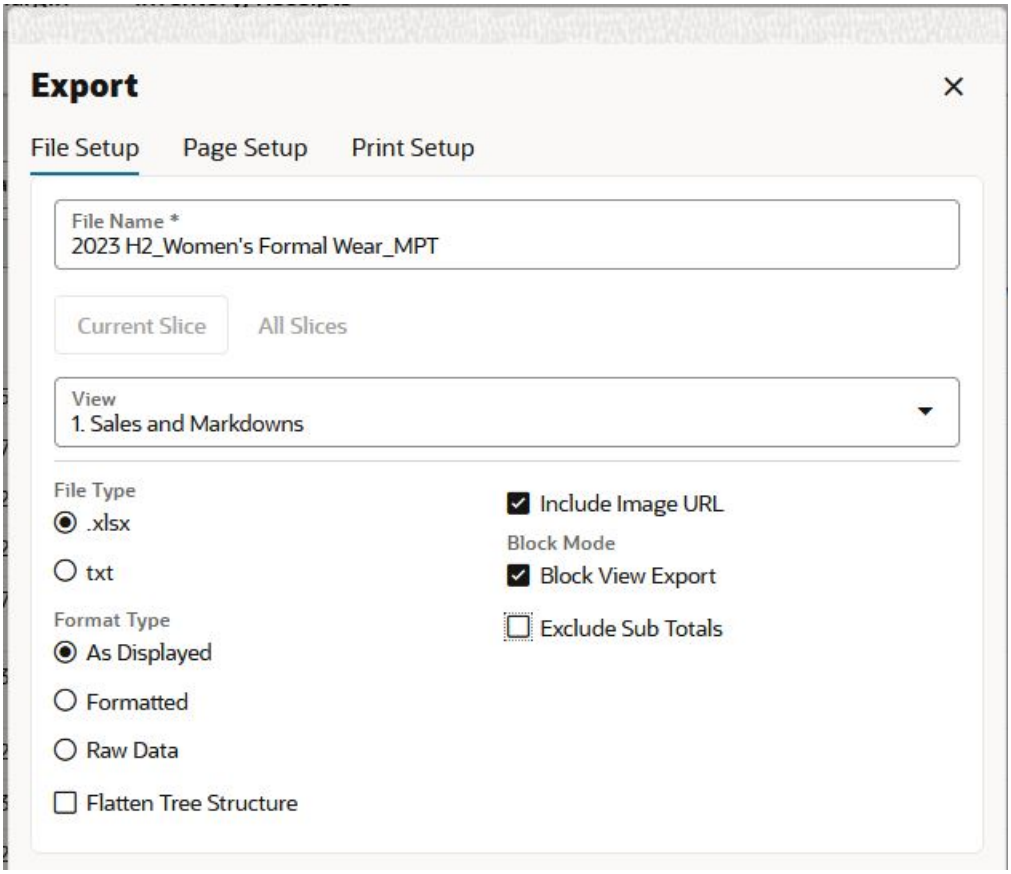
Figure 12-8 Flatten Tree Structure Option



File Setup for All Slices

Perform the following steps to set options for All Slices.

1. Select the File Type as txt or xlsx.
2. Enter the file name. The exported file will have the file name you entered.
3. Select the view that you would like to export for All Slices.

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Figure 12-9 Export File Setup for All Slices – with File Type as txt

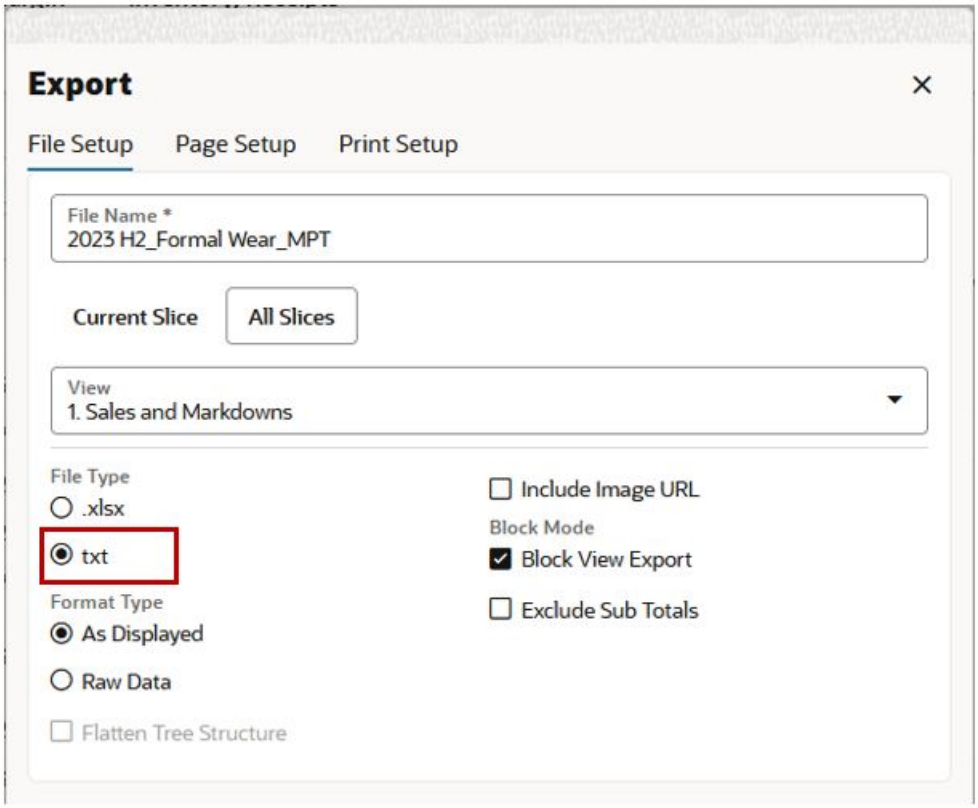

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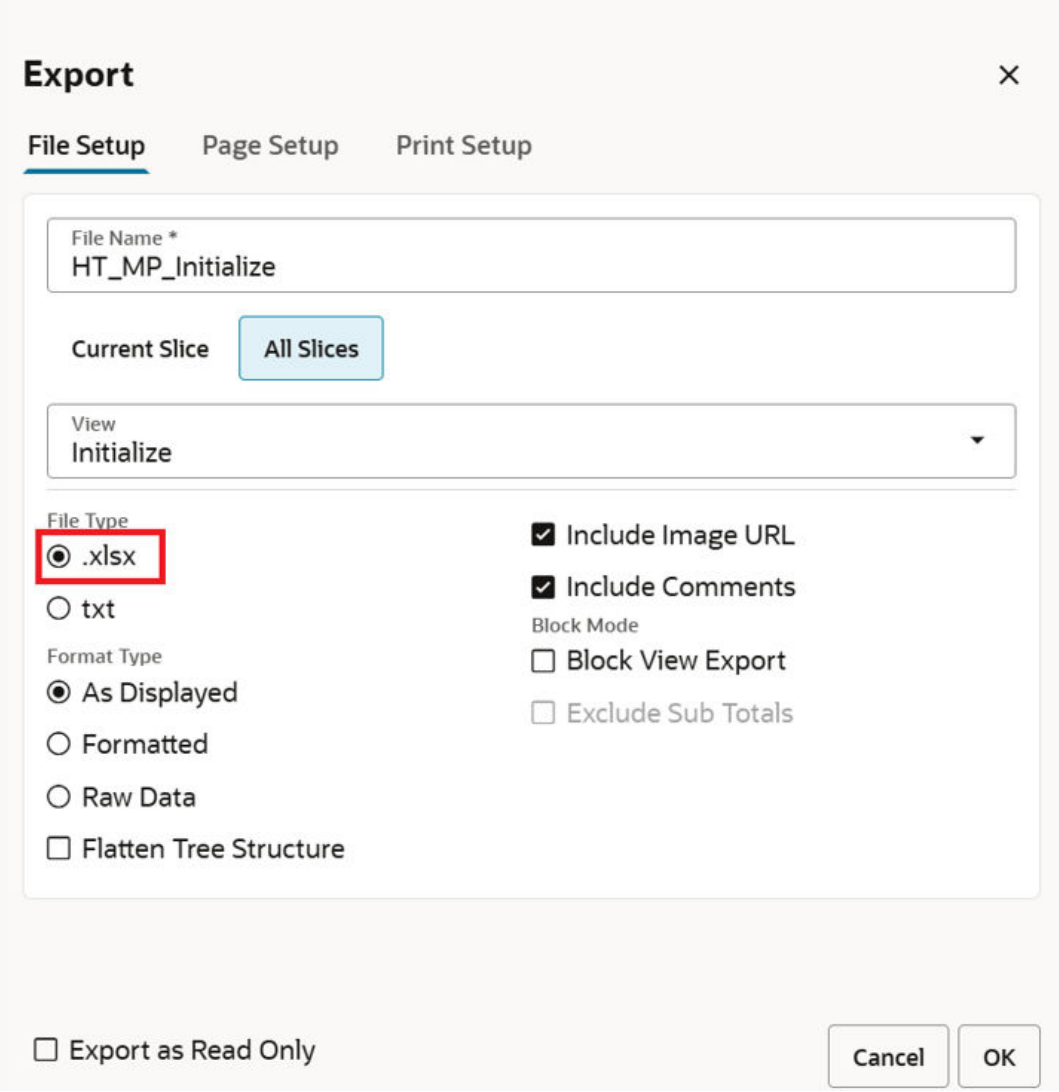
Figure 12-10 Export File Setup for All Slices – with File Type as xlsx



4. Use Format Type to specify the way that you want the data to be exported using the following options:
   - **As Displayed**: the data is exported as it appears in the Content area.
   - **Raw Data:** the exported data in the text file appears without number formatting.

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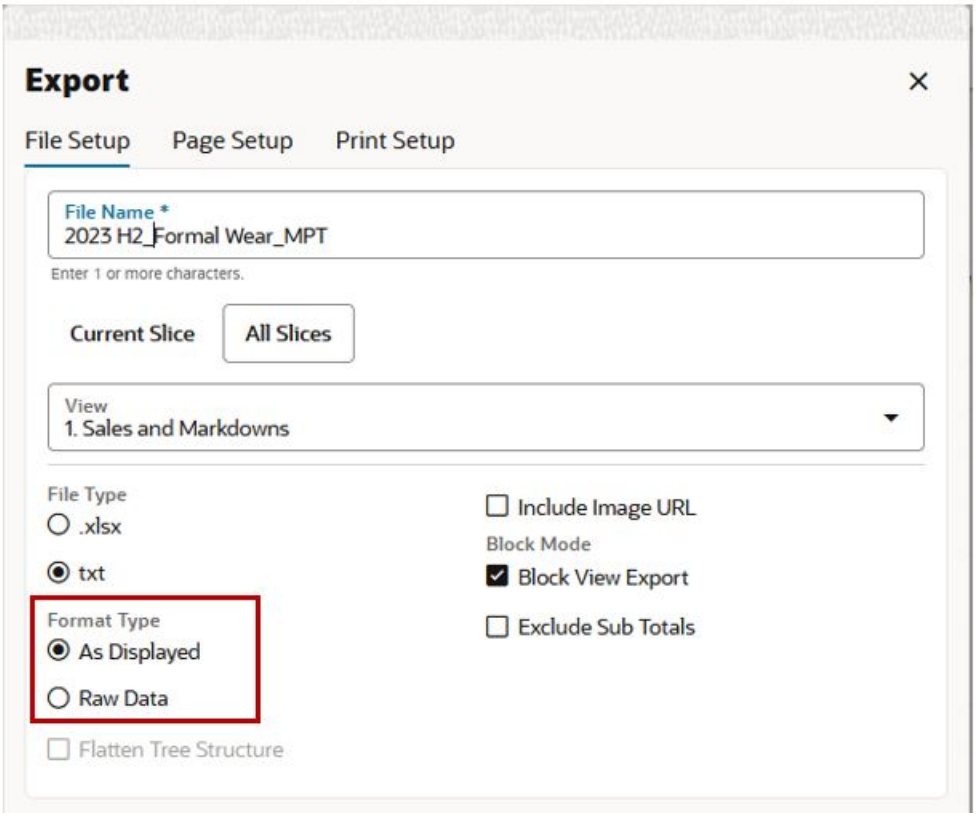
Figure 12-11 Format Type Export Options



5. The **Include Images URL** checkbox is selected by default. This allows you to export the URL of images present on the view such as product images, attribute images, measure images, along with other data. When you clear the Include Images URL checkbox, RPASCE does not export the image.

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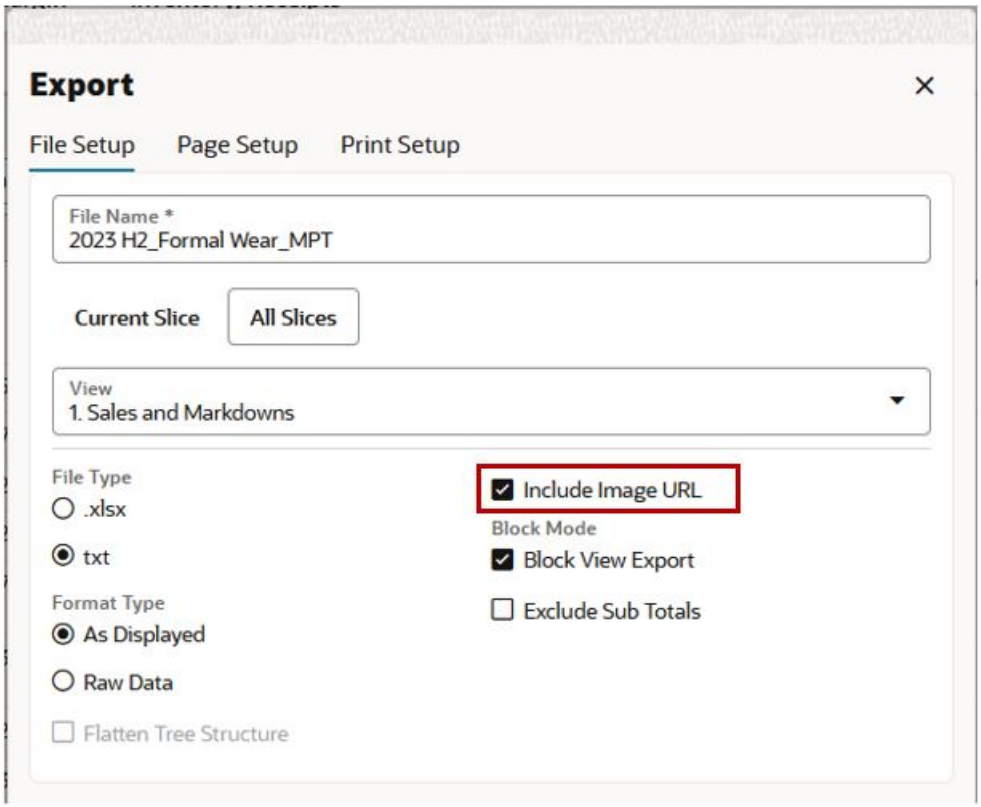
Figure 12-12 File Setup Include Images



6. Use the Block View Export option to export all of the hierarchy levels in a single export file the separate column in an excel file. It helps you to conveniently filter the data.

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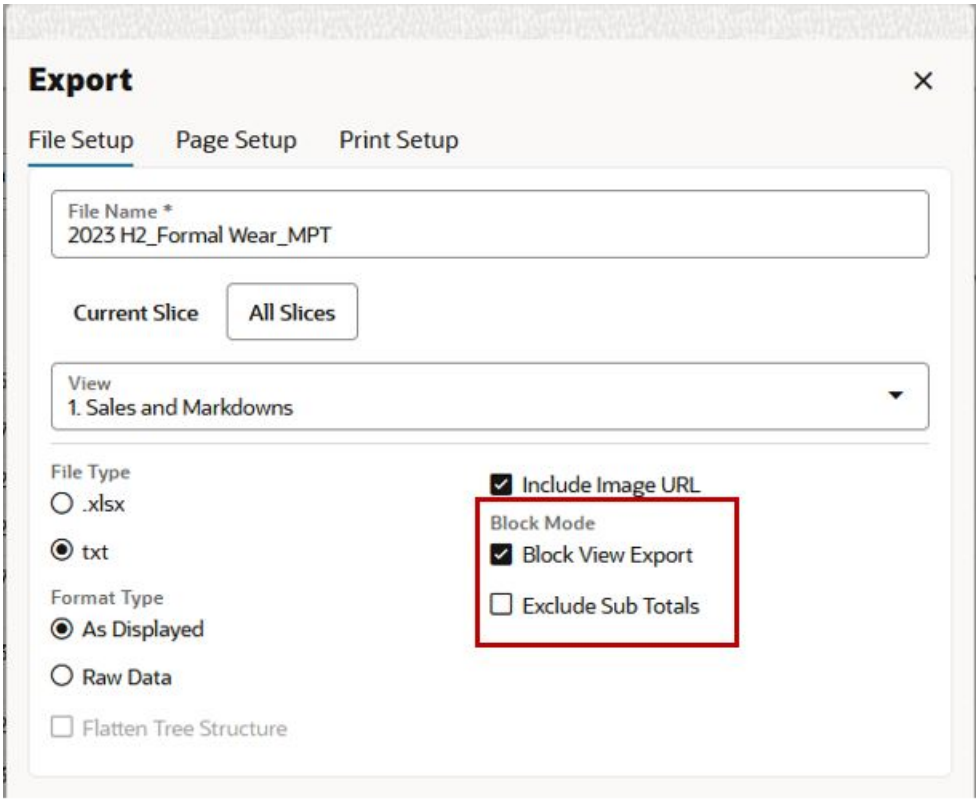
Figure 12-13 Block View Export Option



7. Select the Exclude Sub Totals option to remove the rows with sub-total values of the parent level hierarchy in the export file. This option is enabled only when Block View Export is selected

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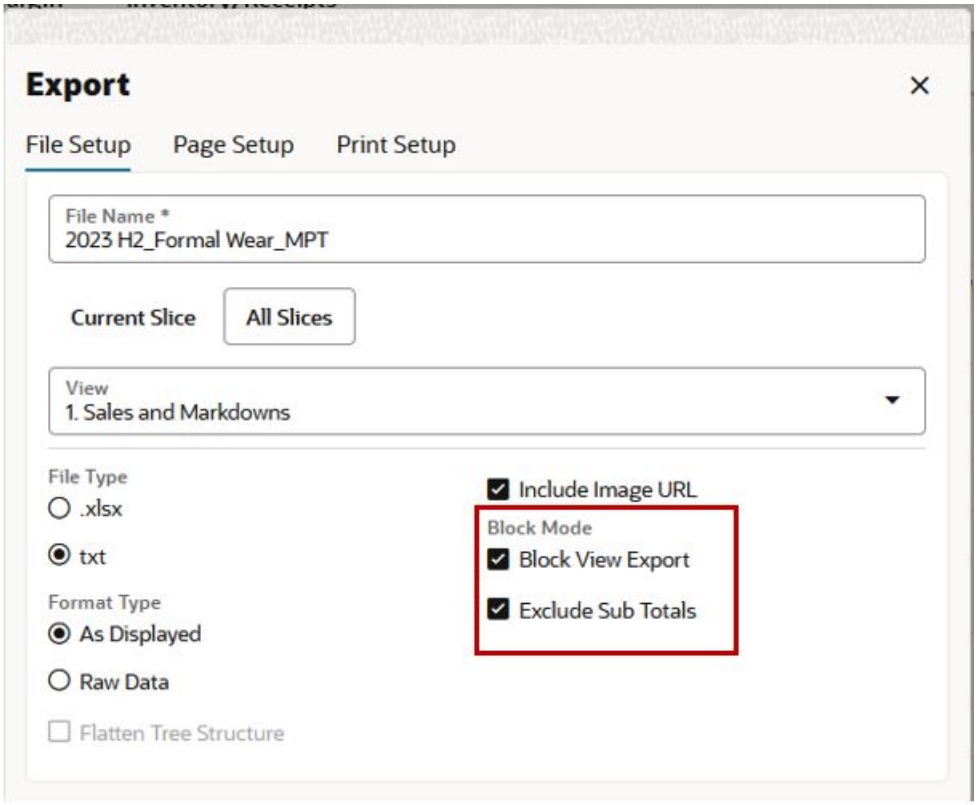
Figure 12-14 Export Block View Exclude Sub-totals



Page Setup

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

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

Page scaling has two options:

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

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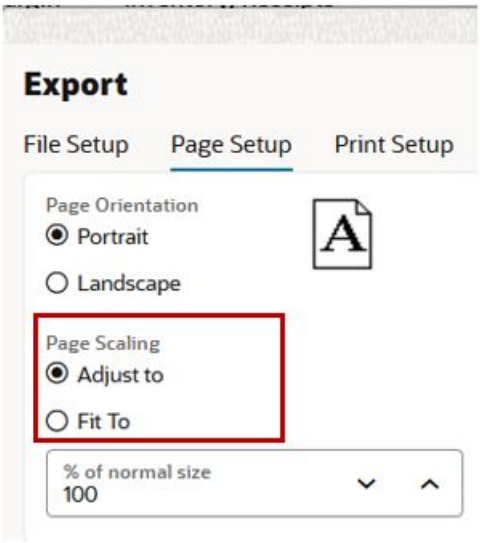
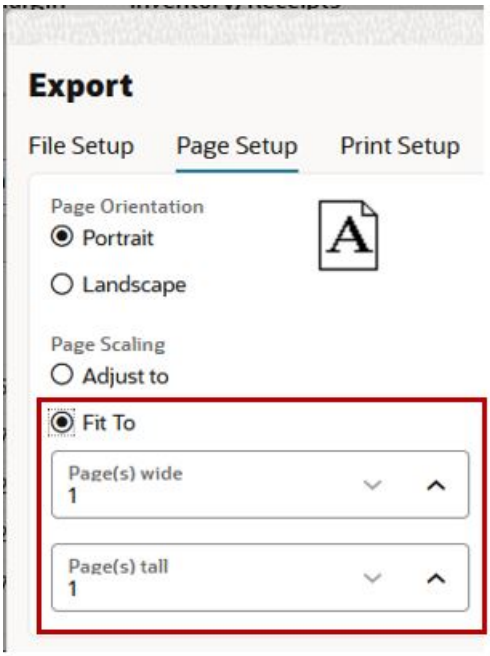
Figure 12-15 Page Setup Adjust To



- **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 12-16 Page Setup Fit To



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

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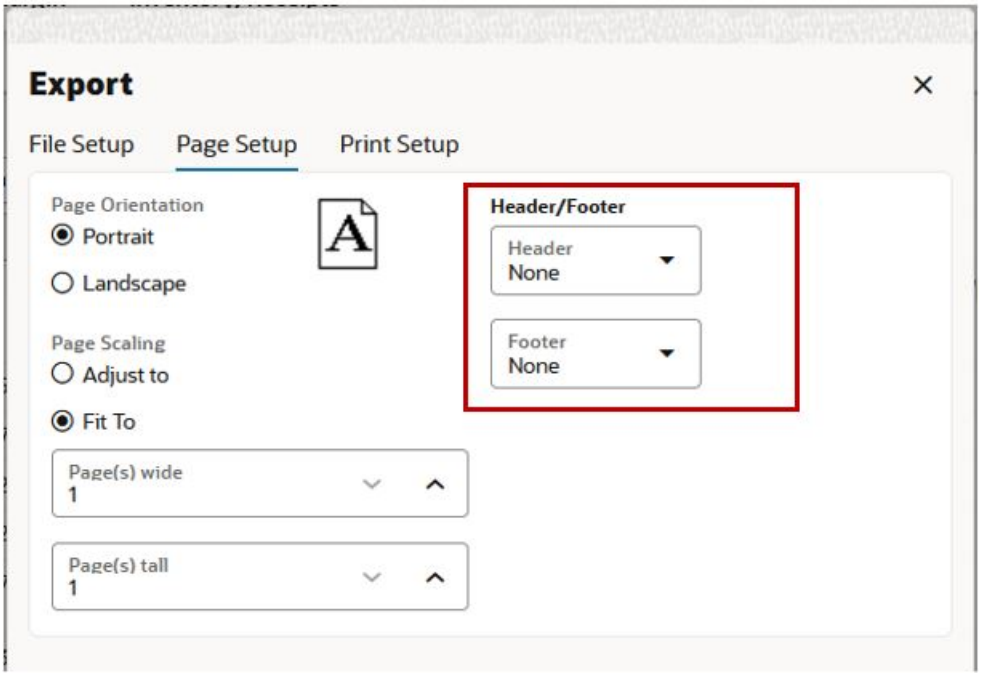
Figure 12-17 Page Setup Header/Footer



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.

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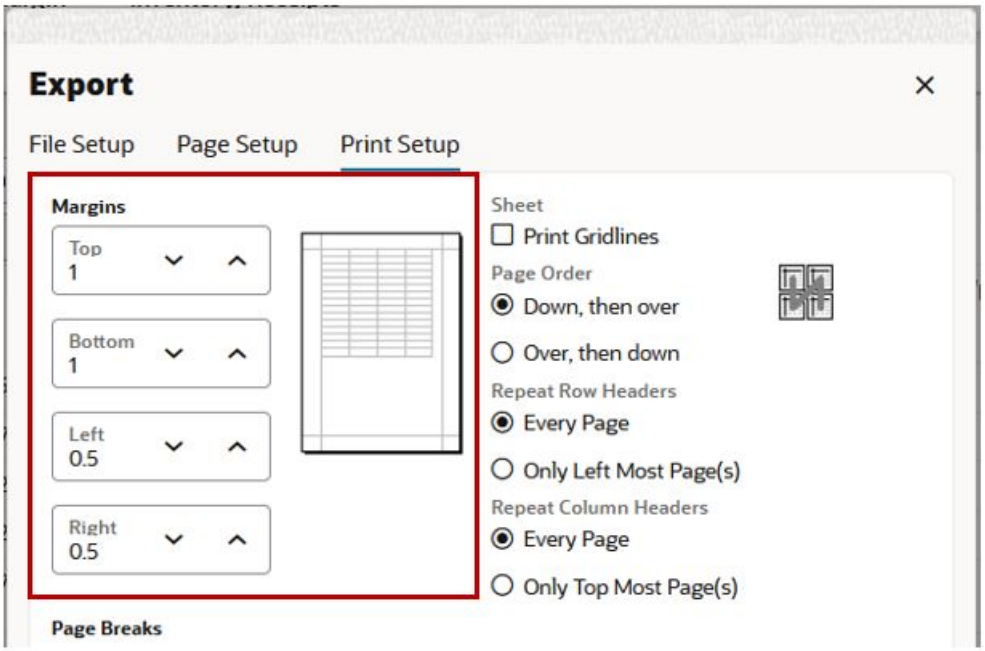
Figure 12-18 Print Setup Margins



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

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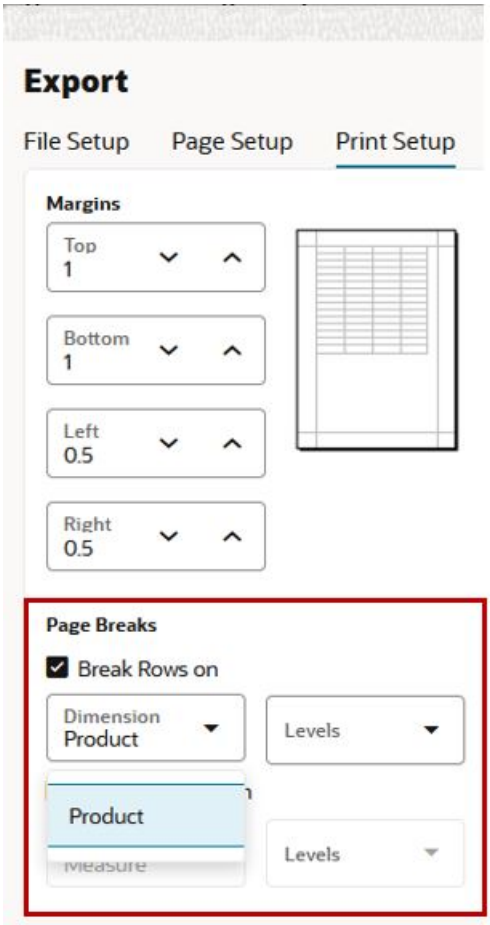
Figure 12-19 Print Setup Page Break Rows On



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.

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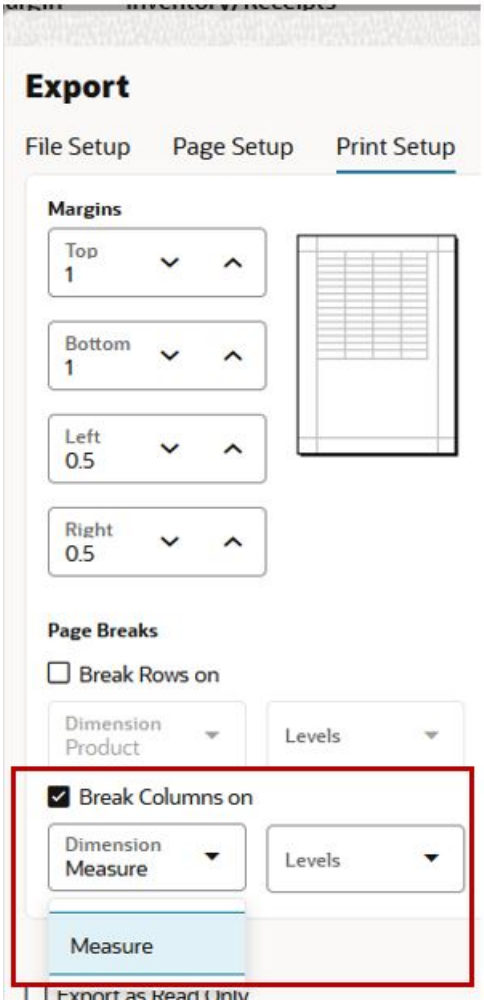
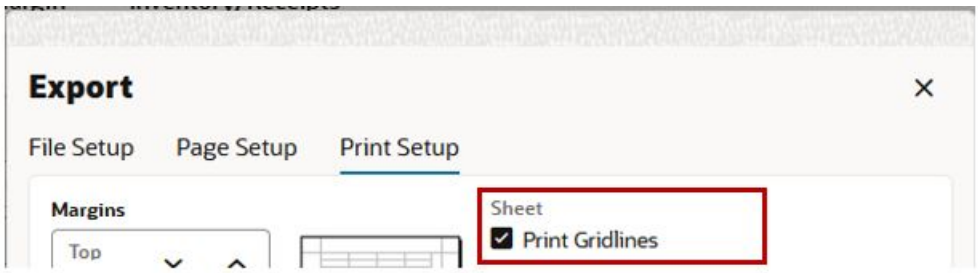
Figure 12-20 Print Setup Break Columns On



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

Figure 12-21 Print Setup Print Gridlines



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

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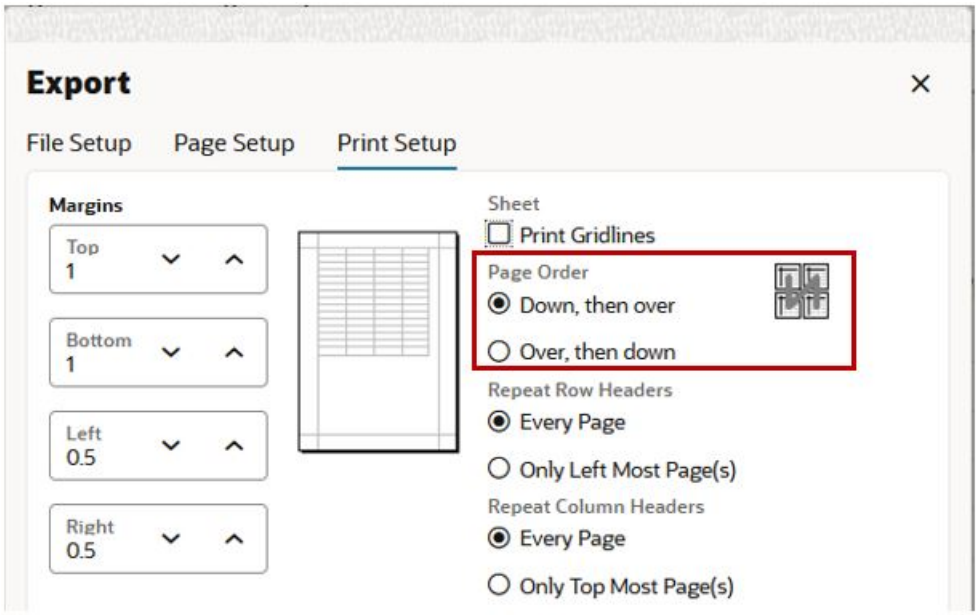
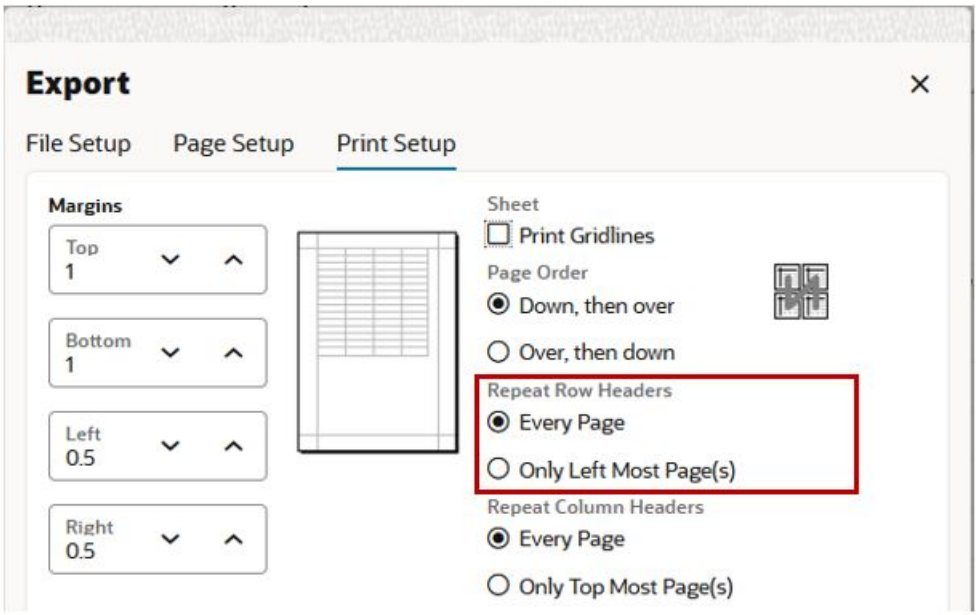
Figure 12-22 Print Setup Page Order



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

Figure 12-23 Print Setup Repeat Row Headers



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

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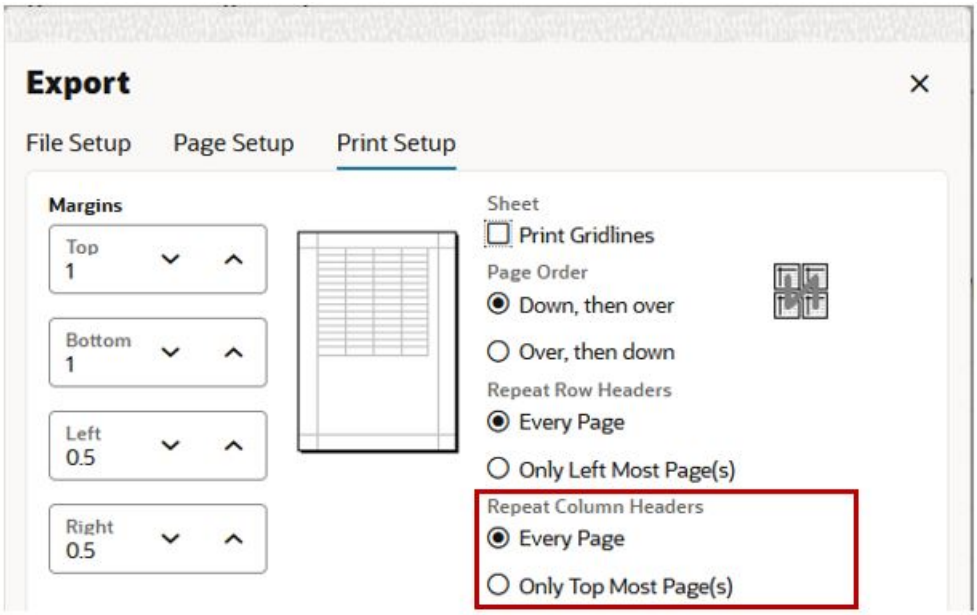
Figure 12-24 Print Setup Repeat Column Headers



After Setup

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

If you have selected the file type as **xlsx**, then the export task is initiated and you receive an initiation notification. The progress of the task can be monitored on the Admin Dashboard. Once the file is ready for download, you receive a notification to download. The downloaded Excel has each slice as a separate tab.

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.

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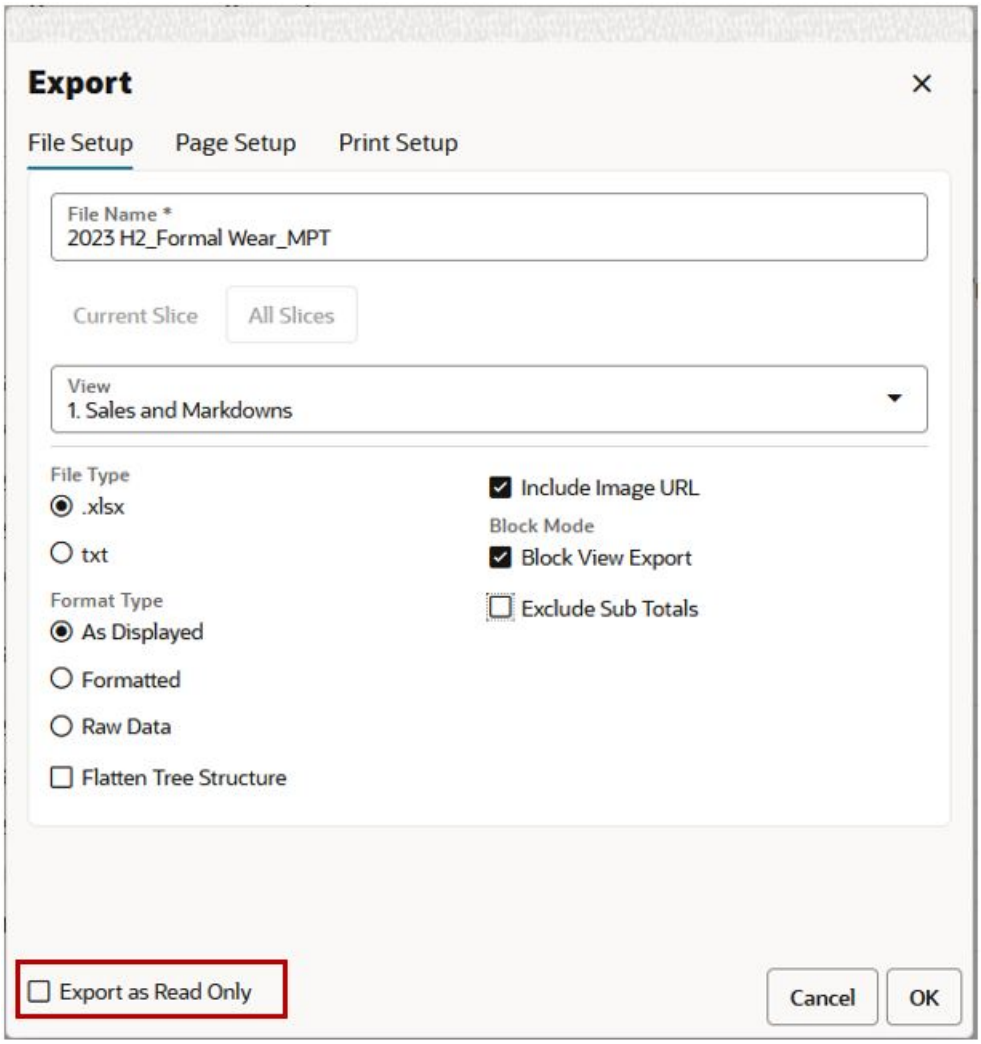
Figure 12-25 File Setup Export as Read Only



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

Click **Cancel** to exit the export window without downloading.

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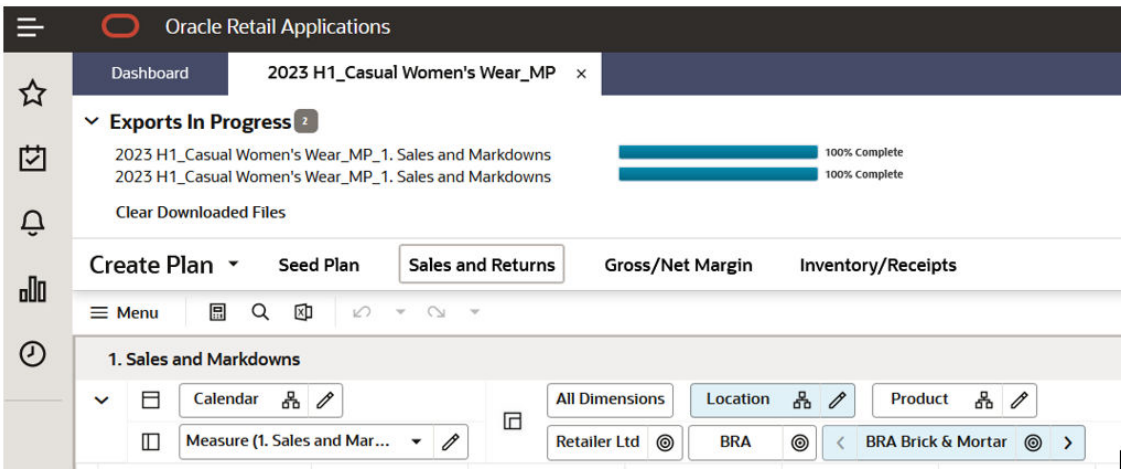
> **Note**
>
> Excel supports only 1,048,576 rows and 16,384 columns, if you are exporting more than this limit then you are notified with these failure messages:
>
> - ***There are too many rows in the view. The file cannot be exported with more than 1,048,576 rows and 16,384 columns. Reduce the amount of rows and try again.***
> - ***There are too many columns in the view. The file cannot be exported with more than 1,048,576 rows and 16,384 columns. Reduce the amount of columns and try again.***
>
> This limit is also applicable to current slice .txt or each tab in the .xlsx format. If you are exporting all slices to an Excel workbook, the maximum allowed slices is 1,000. If you want to reduce that, any of these limits can be set in the self-service system configuration option under the Export tab by an Admin user. For more details on Self Service Configuration Properties, refer to the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*, Chapter 14 “Additional Configuration".
>
> To export data that is more than the Excel limit, you can export the data using the **Export All Slice** option which provides the output in .csv file format.

Export Progress

You can track the status of the export from the Export Progress banner message on top of the mega menu. Once you confirm the export, the banner message displays the file name, progress bar, percentage complete, and estimated time remaining that all help you keep track of the export.

Figure 12-26 Export Progress Banner Message



Points to Remember

- The count of downloads is displayed against the Export in Progress heading.

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- The export in progress message will display only 5 download statuses at a time. If you proceed with a 6th export task, the last 100% complete download file in the list will be removed automatically.
- You cannot have more than five exports in progress at a time. If there are five in progress exports in progress, an error message displays for the 6th export.
- You can minimize the export in progress message by using the small arrow available next to export in progress label.
- Click **Clear Download Files** to clear the list of exports present in the message.
- The export in progress message is separate for each workbook.
- The success export download displays **100% Complete** status whereas the failed export download displays **Failed** status with red alert icon.

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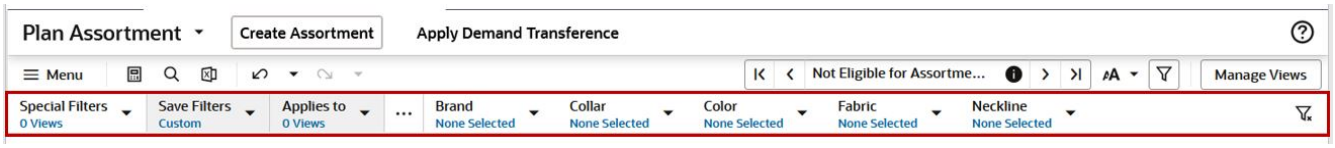
13
Workspace Filters

This chapter describes workspace filters.

Workspace Filters

Workspace filters are shown in Figure 13-1.

Figure 13-1 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 RPASCE 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.

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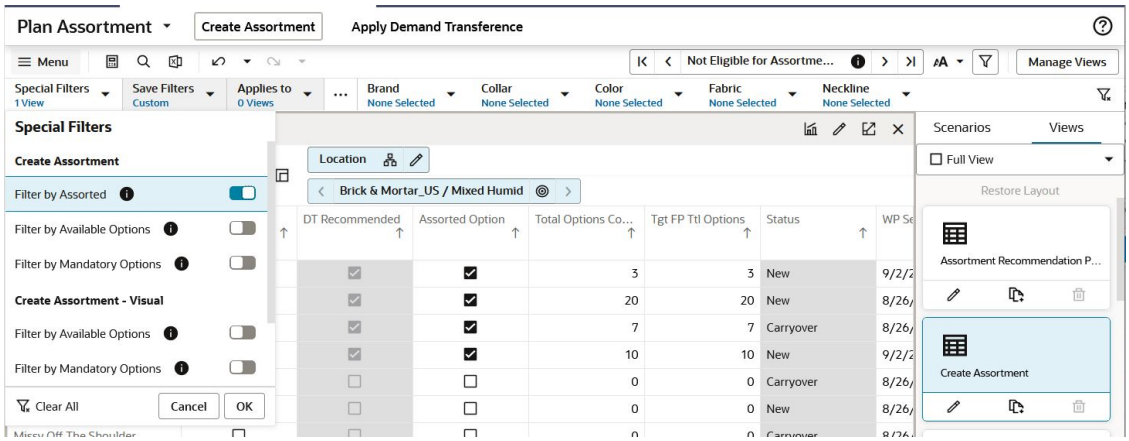
Special Filters Definition

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

You can select the special filter from the Special Filter drop-down list. The special filter drop-down list has the filters listed per views. To apply special filters, you can slide the toggle to on or off.

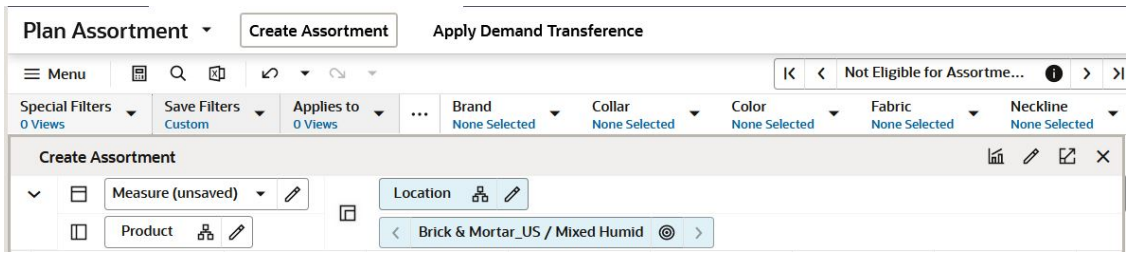
Figure 13-2 Select Filter



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 13-3 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

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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.

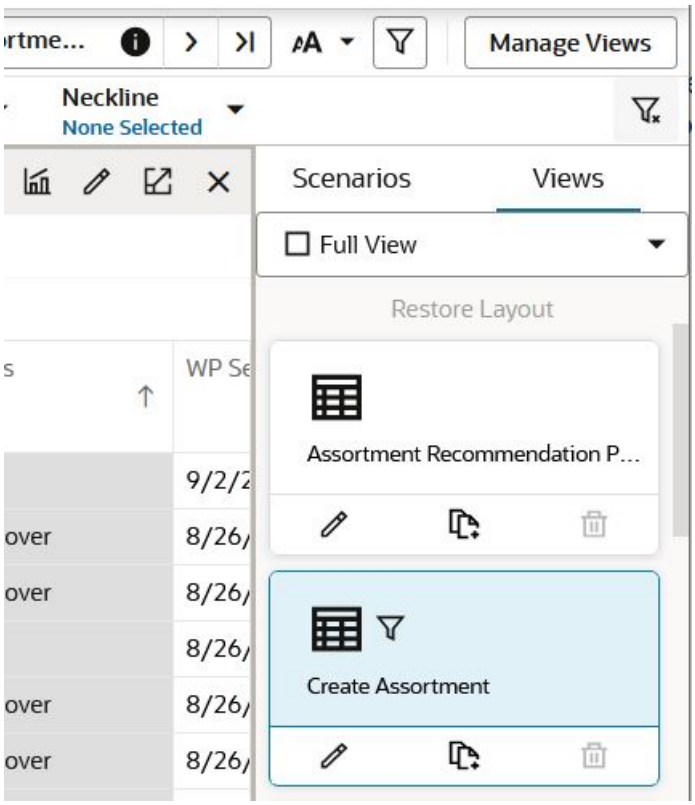
When the special filter is turned on, the Special Filter icon on the Quick Access Tool bar appears highlighted and is applied to the view in the view management drawer.

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 13-4 Filter Icon that Shows the Special Filter is Applied to the View



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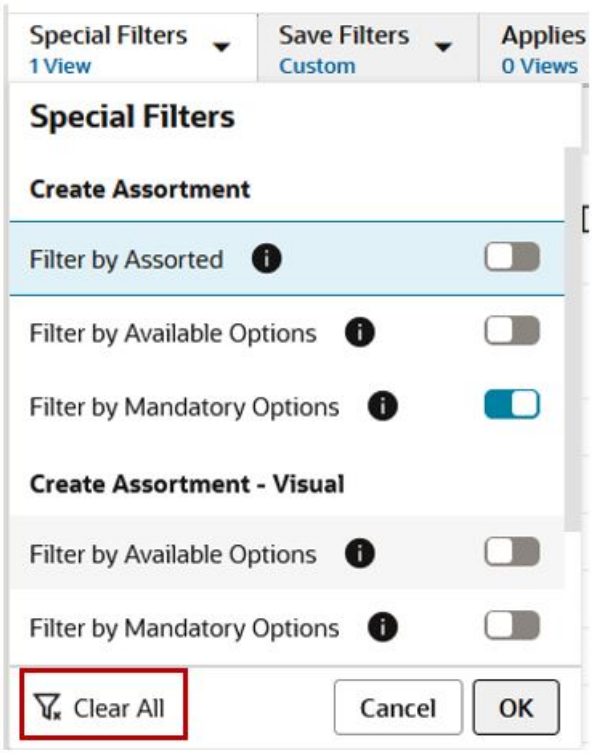
You can clear all the special filters applied by clicking on the special filters LOV, clicking **Clear All**, and then clicking **OK**.

Figure 13-5 Clear Special Filters



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 13-6 No Special Filter Matches

Out of Sync Special Filters

Planners may need to apply a manual show or hide over special filter result for analyzing the data. In such case, an out of sync alert is highlighted in the Special Filter drop-down list. This helps you to highlight that there has been manual show or hide applied over the special filter result.

You can see the out of sync alert icon ***i*** highlighted on the Special Filter header. Click the Special Filter drop-down to see an **Out of Sync** alert at the bottom of the list with a **Re-apply Filters** link. To revert back to the special filter result, click the re-apply filter link which re-evaluates the filter and hides the manual show or hide updates.

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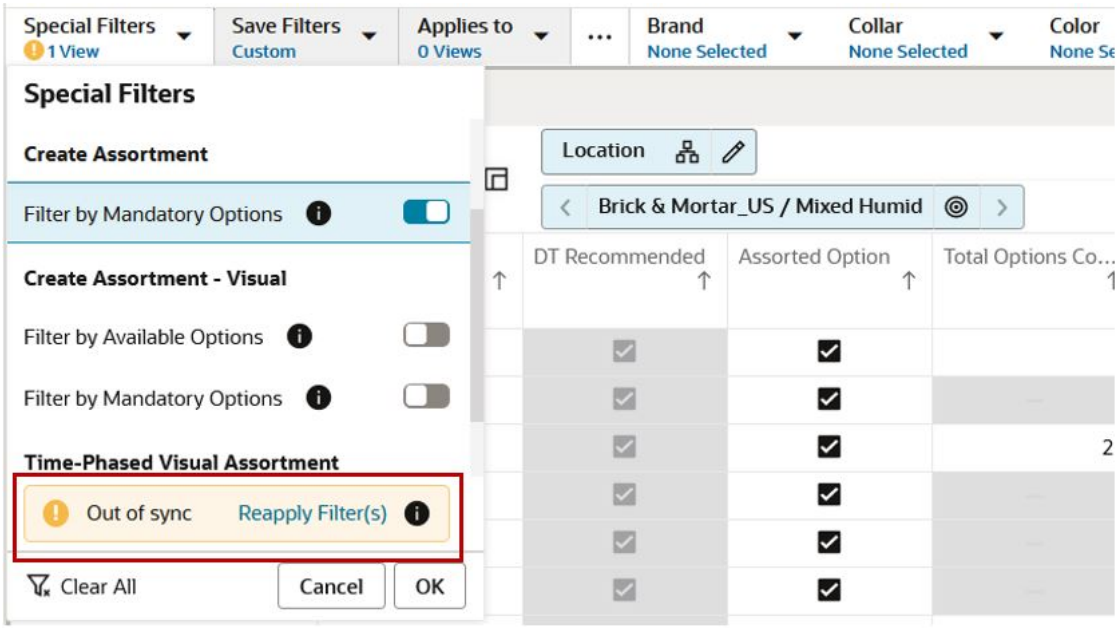
With the manual show or hide applied over the special filter result and you move the page edge scroll to another page, the special filter result will not re-evaluate. In such a case, an out of sync alert is highlighted in the Special Filter drop-down list. You can choose to work with the selection or click the **Re-apply Filter** link to re-apply special filter.

Figure 13-7 Out of Sync and Reapply Filters Link



Special Filter Information

You can see the information about the special filters from the tool tip displayed next to each special filter. When you hover over the **i** icon, you can see quick information about the special filter such as:

- Filtered dimension
- Driving dimension
- Whether it is enabled or not

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.

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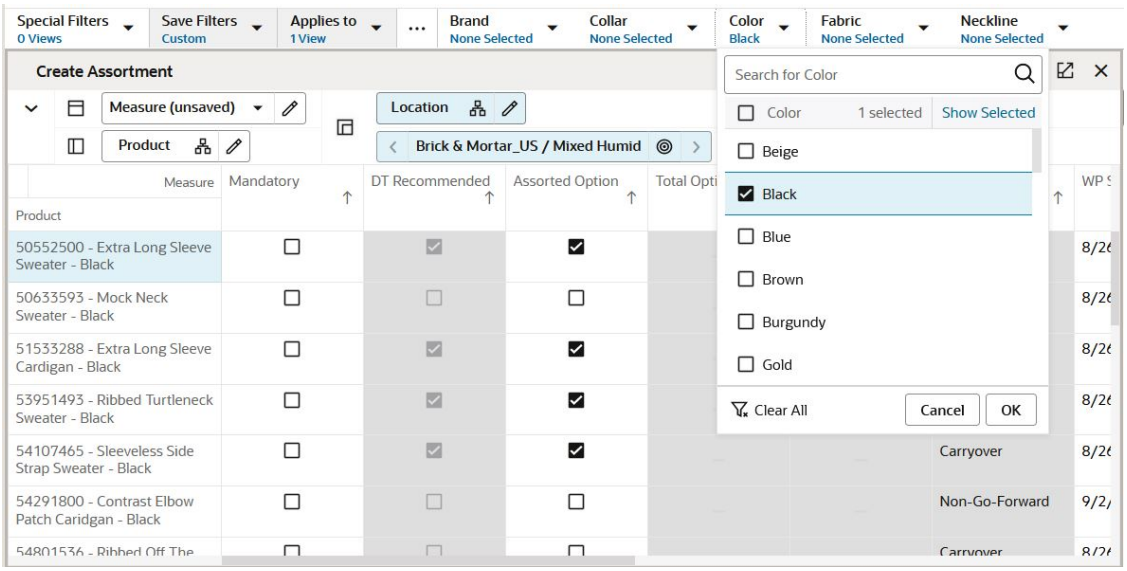
Figure 13-8 Attribute Filters



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, **OK** is unavailable. The first five attribute filters are displayed on the filter bar by default.

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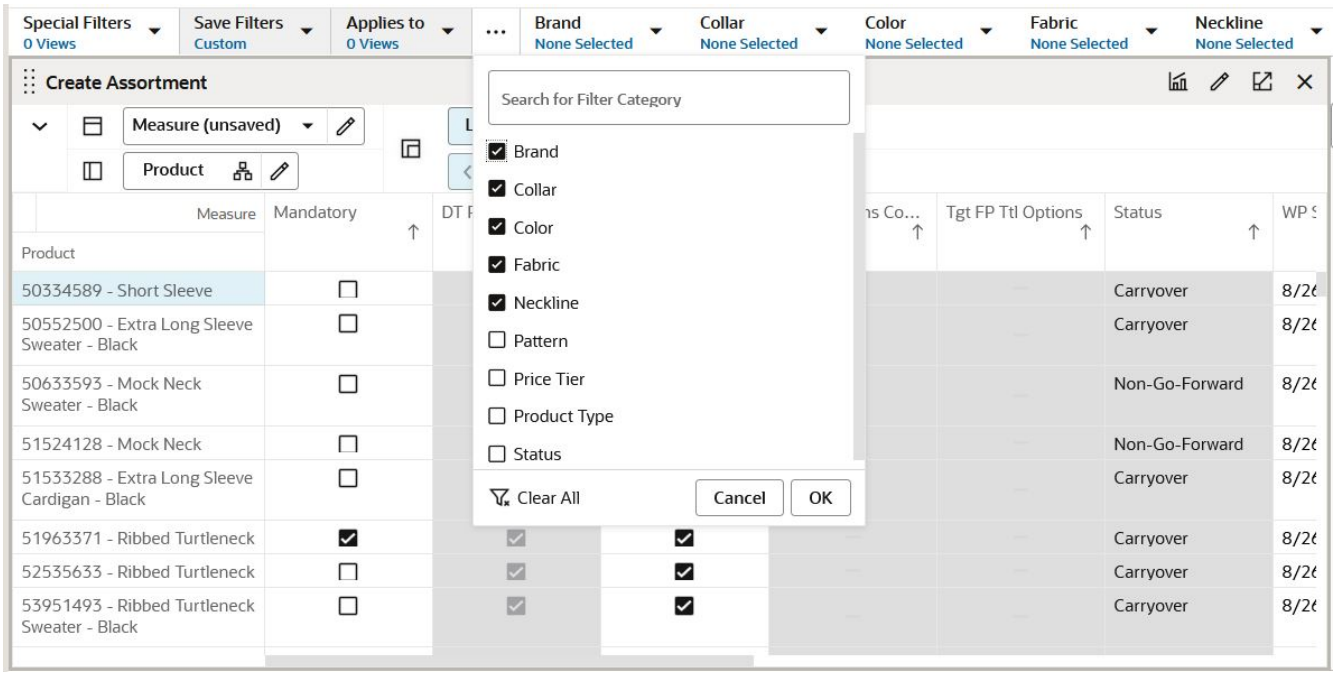
Figure 13-9 Attribute Filters Category



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.

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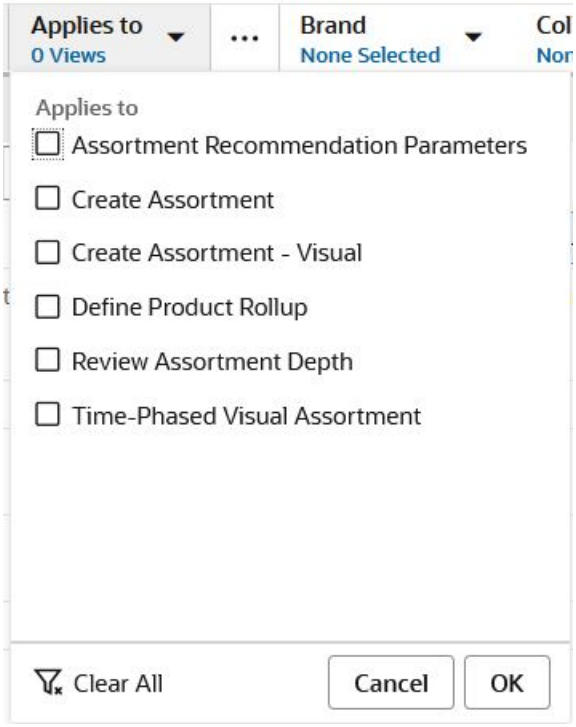
Figure 13-10 Apply Attribute Filters



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 axis, based upon the selected attribute of one or more dimensions.

You can clear all the attribute filters applied to a view when you click the Applies to LOV and then click **Clear All**, and finally click **OK**.

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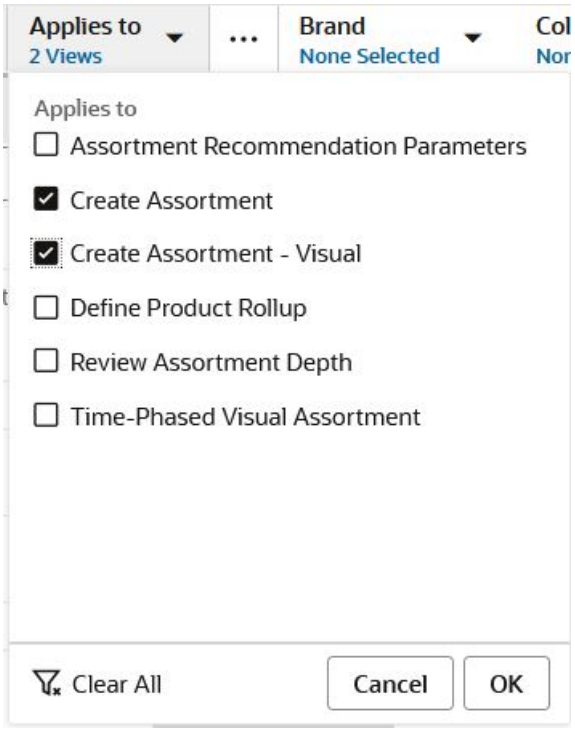
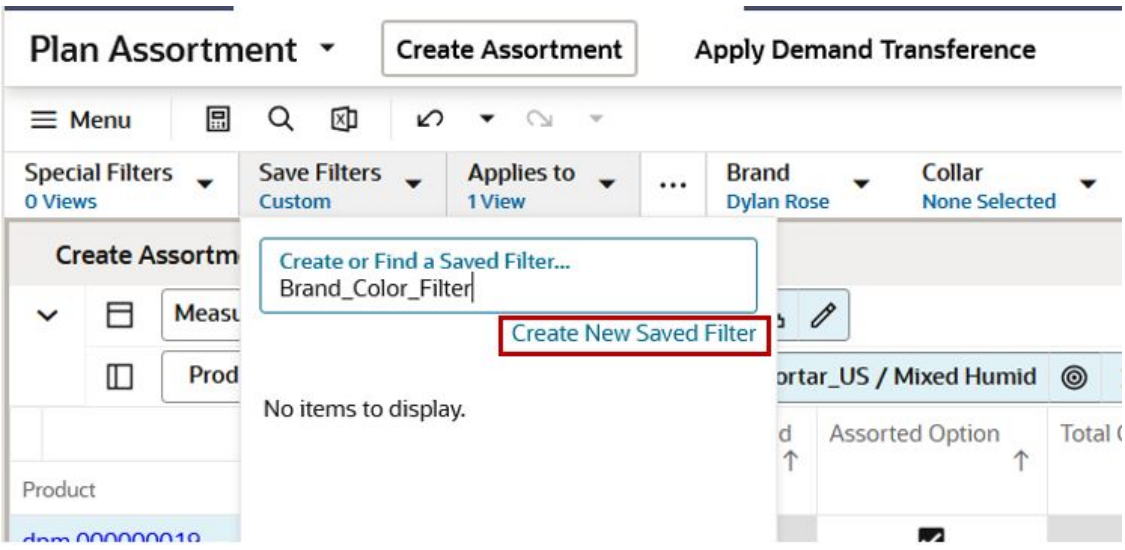
Figure 13-11 Clear Views Selection



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 13-12 Save Attribute Filters



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

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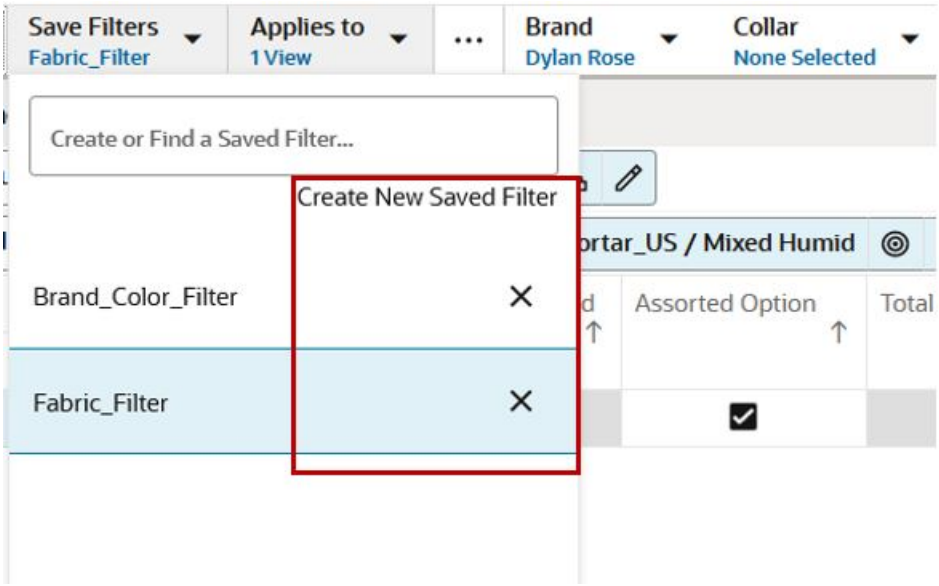
list of saved filters. To find the saved filter, enter the name of the filter in the **Save Filters** text box.

Deleting Saved Attribute Filters

To delete a saved filter located in Save Filters, click the **X** icon next to the name of the filter.

Figure 13-13 Delete Save Filters



Clear Workspace Filters

To clear all the workspace filters applied, click the Filter icon that is located on the Quick Access Toolbar, and then click **Clear All**.

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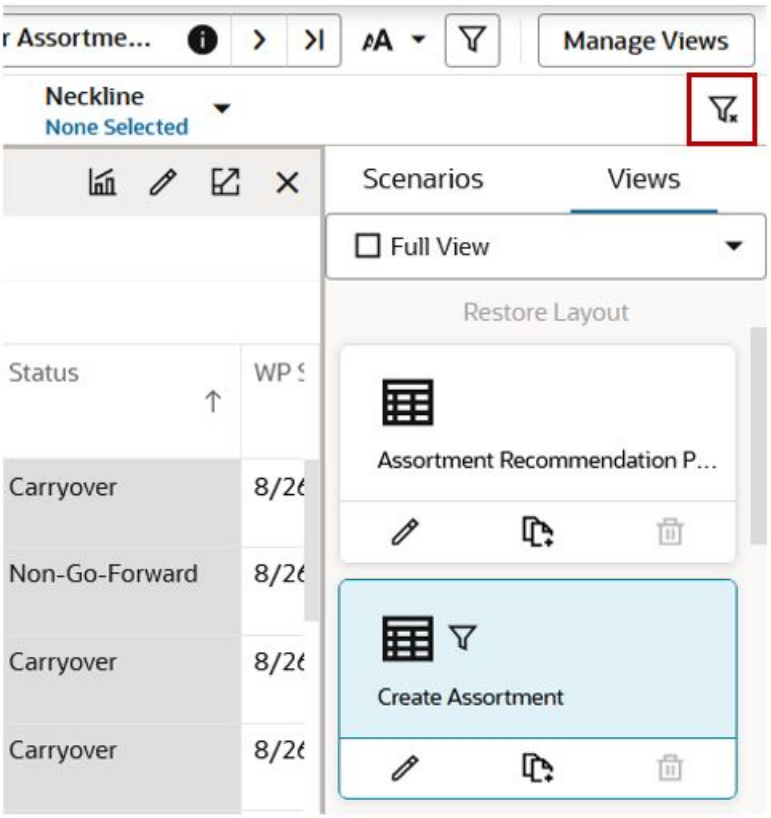
Figure 13-14 Clear Workspace Filters



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14

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 Positions**. The Figure 14-3 window opens.

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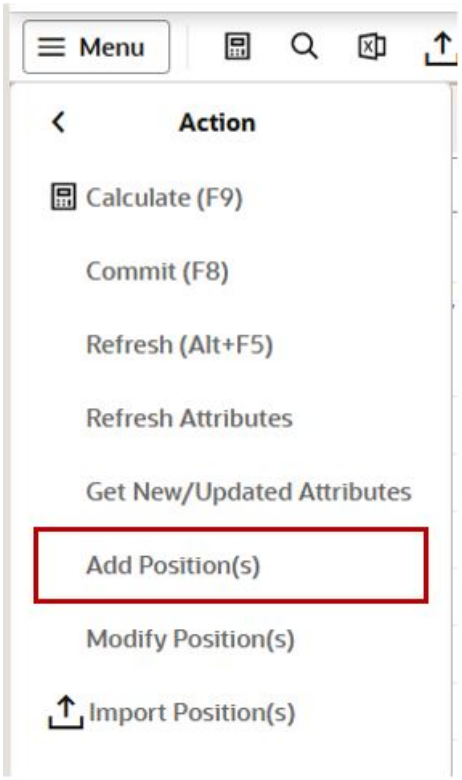
Figure 14-1 Add Positions Option



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

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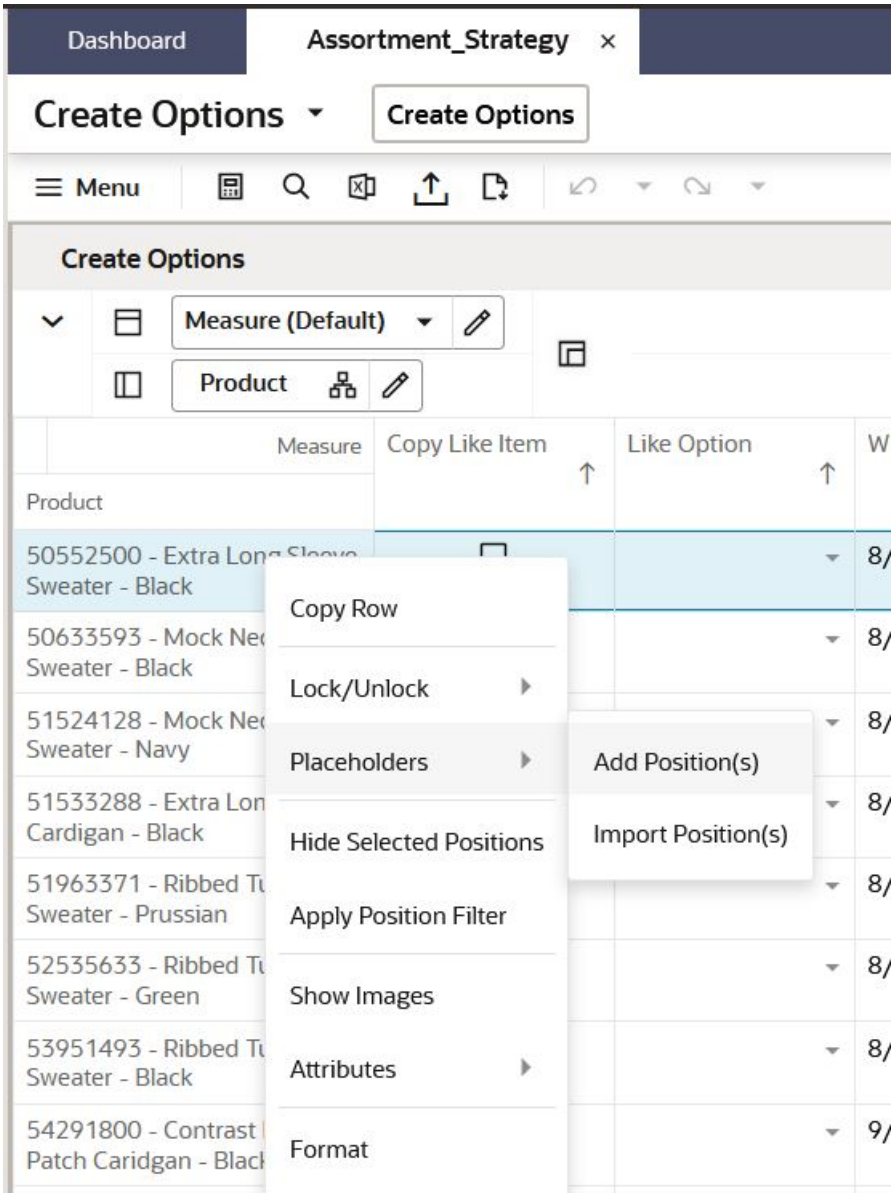
Figure 14-2 Add Positions Context Menu



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

2. The Figure 14-3 window opens with values that defaults to first option available. The Dimension and Level selection options are always available.

Selecting Dimensions

- You can select the dimension for which you want to create the placeholder positions. Only the list of dimensions for which the DPM functionality is enabled displays.
- You can select the level at which you want to create the placeholder positions. The list of levels depends on the dimension selected and also on the user's ability to create new levels.

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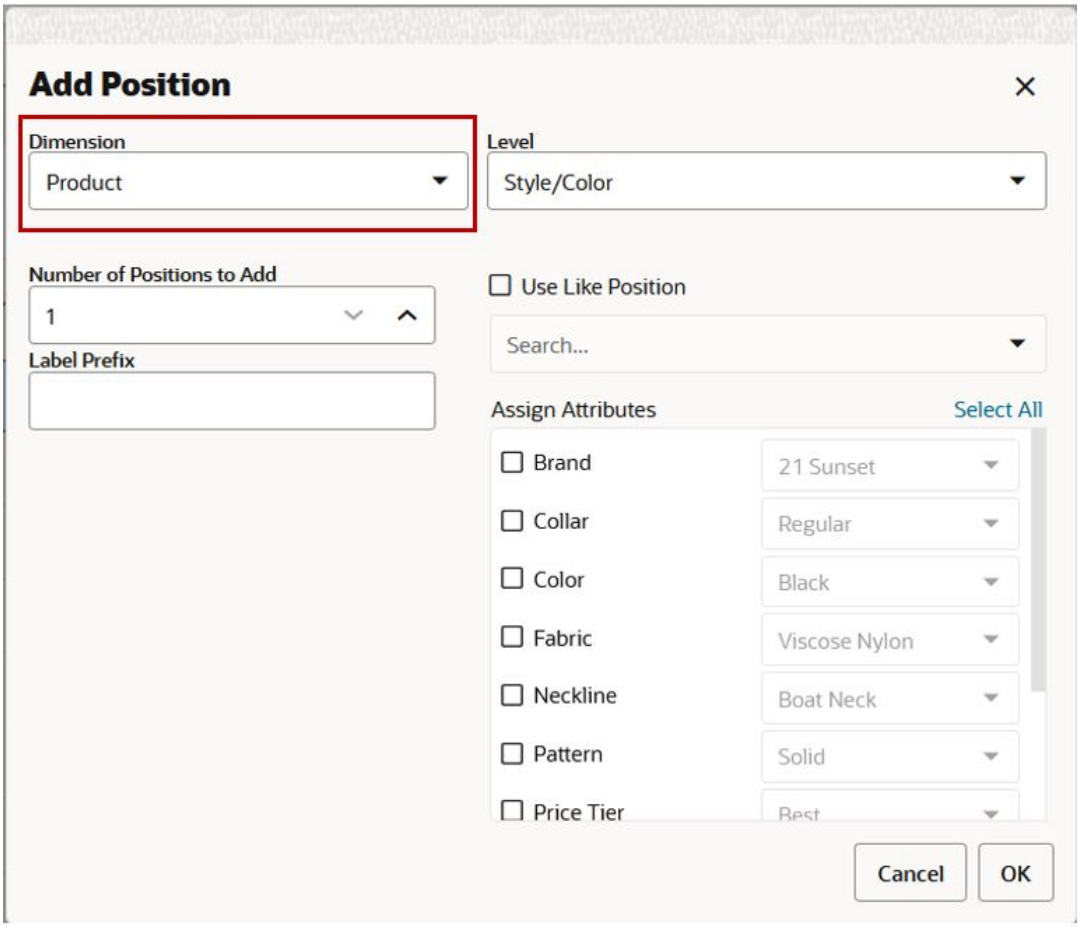
Figure 14-3 Add Position



You can either:

- Enter the number of positions to add in the **Number of Positions to Add** field.
- Select the number of positions to add by using the up and down arrow keys.

Create placeholder positions with when you enter details in the **Label Prefix** field. The label is used for all of the number of positions specified in the **Number of Positions to Add** field.

Modifying the Values of the Parent Positions

The parent positions of the newly added dynamic positions are shown in the tabular layout of the Figure 14-3 window. The planner can modify the values of the parent positions if required.

You can choose either of the options:

- Use Like Position
- Assign Attributes.

When you Choose the Option	Then
Use Like Position	You select a like position by choosing a position from selection list of existing items.

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When you Choose the Option	Then
Assign Attributes	Default attribute values are assigned and the attributes enabled in configuration for that level are displayed.

Specify Attribute Information

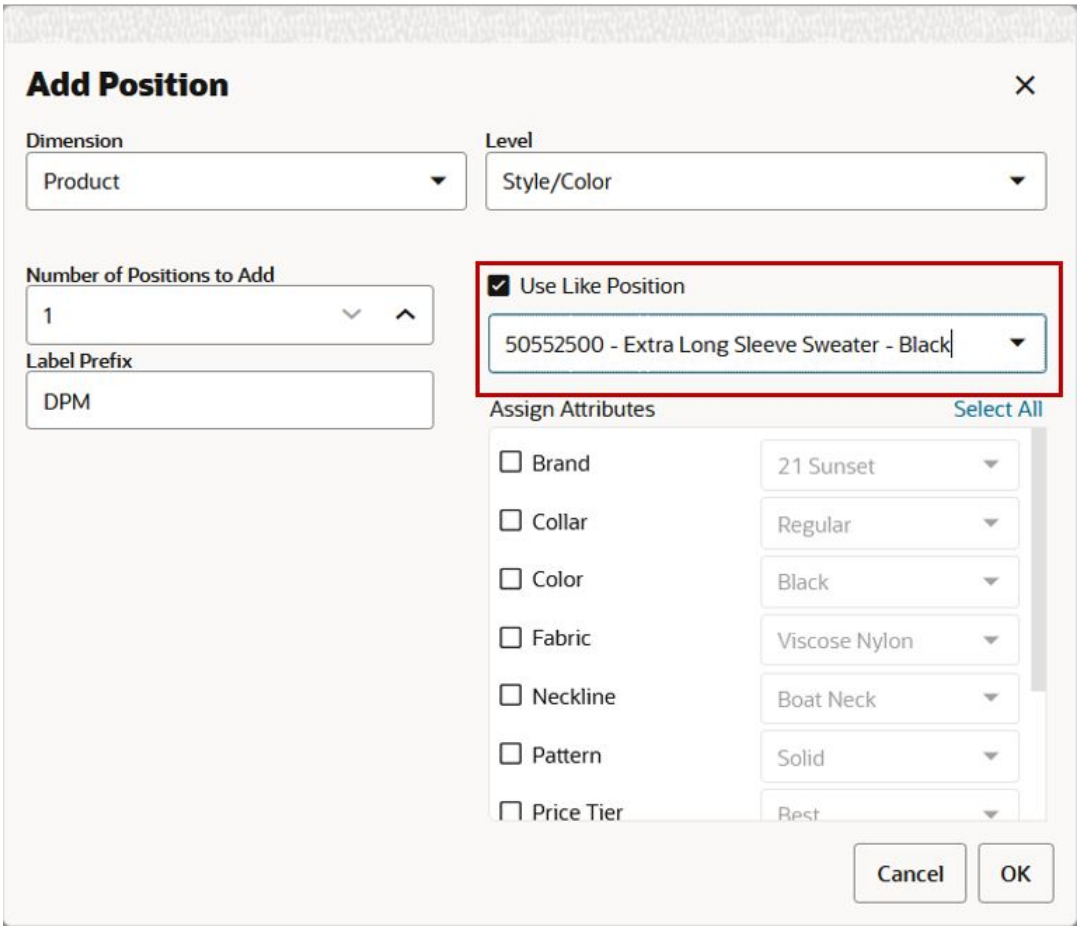
If you select the **Use Like Position** option and then select a position from the list of existing items, you can simplify the process of specifying attribute information for new positions. You can copy the attribute information in part or whole from the Like Position to the new positions using the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

A row becomes editable when you either:

- Press **Enter** and then press **F2**.
- Double-click the current row.

Press **Tab** to navigate to the next cell. Exit Edit mode by pressing either **Esc** or **F2** again.

Figure 14-4 Add Position - Use Like Position



3. The Figure 14-5 window adds the positions at the launched dimension position level. A unique number is added to the duplicate position labels in the Figure 14-5 window. This unique number is to avoid the addition of duplicate informal positions. You can edit the position label in the Figure 14-5 window

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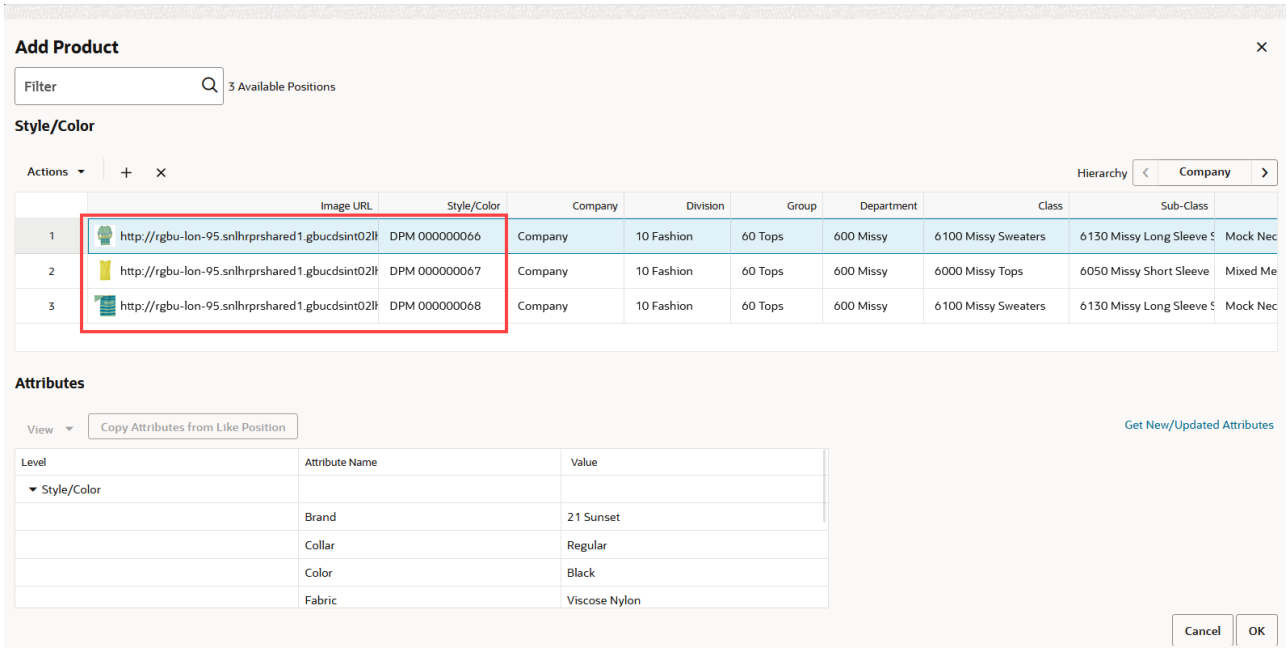
When adding informal positions, a validation error appears in case of duplicate values with the Figure 14-5 or Figure 14-12 windows.

You can add an image for the informal position added from the Add Product window. The first column shows the image and URL text input field. The images added for the informal position defaults to both the thumb and full image designated to main facet for the first media attribute. The Image URL field is not mandatory field, so you can skip addition of an image.

Use the **Add Product** dialog box to update the position hierarchy parent level positions for the placeholder position. You can view the parent positions displayed in descending order next to the placeholder position.

You can update the position hierarchy or position parent values using the drop-down list available from the dialog box. When you select position hierarchy such as, department, you can see that the child positions are filtered for the selected department for easy selection of respective class, sub-class, style.

Figure 14-5 Add Product



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.

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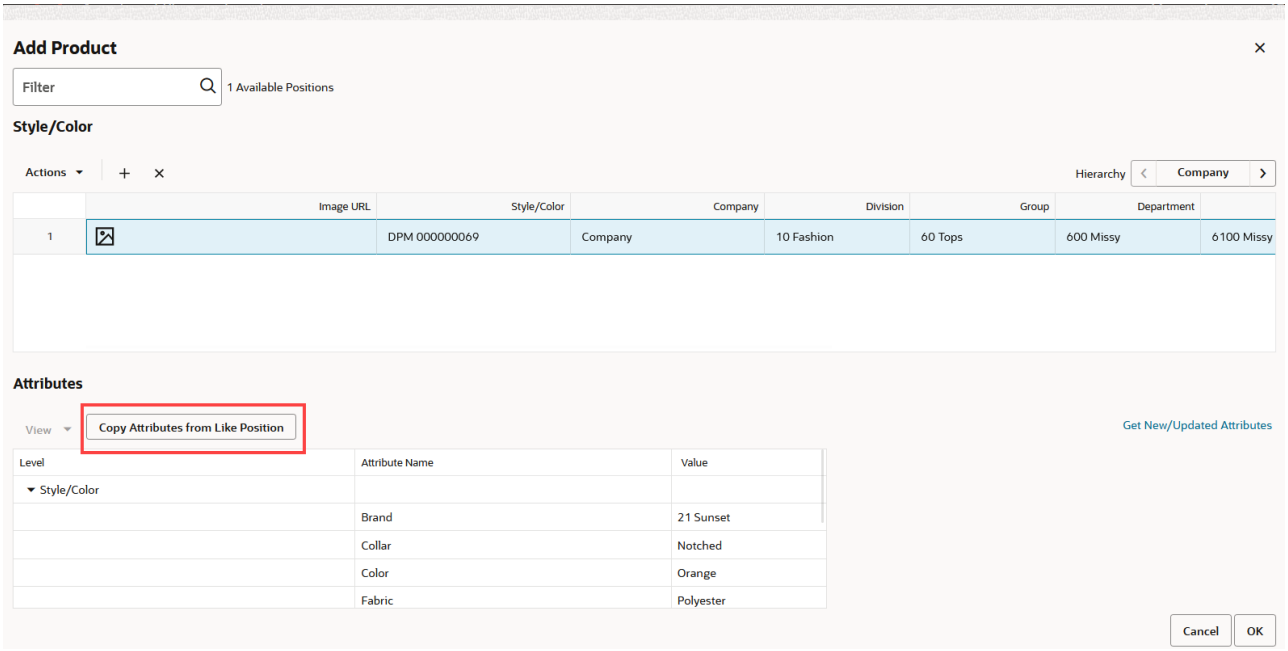
Figure 14-6 Copy Attributes



Click the left and right arrow keys to update 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 links to help you quickly identify placeholders. The link opens the Figure 14-11 window.

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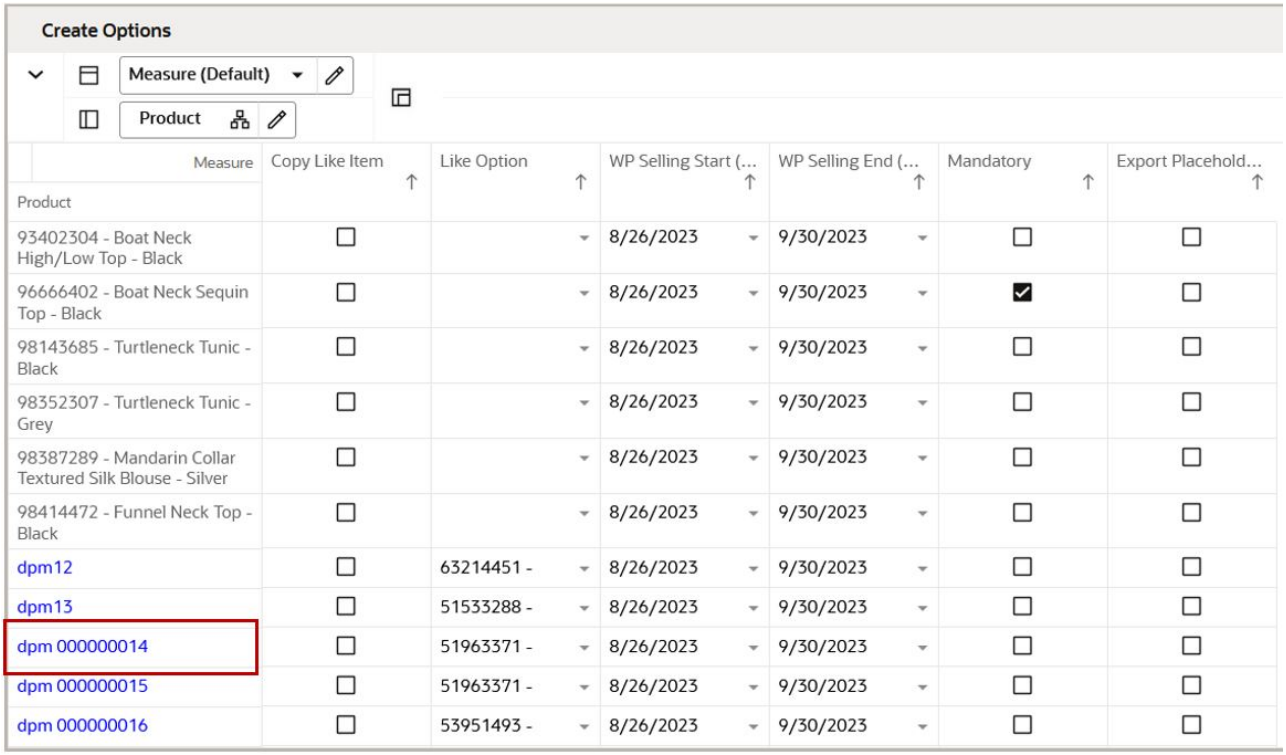
Figure 14-7 Placeholder Position



> **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, then 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 higher than 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*.

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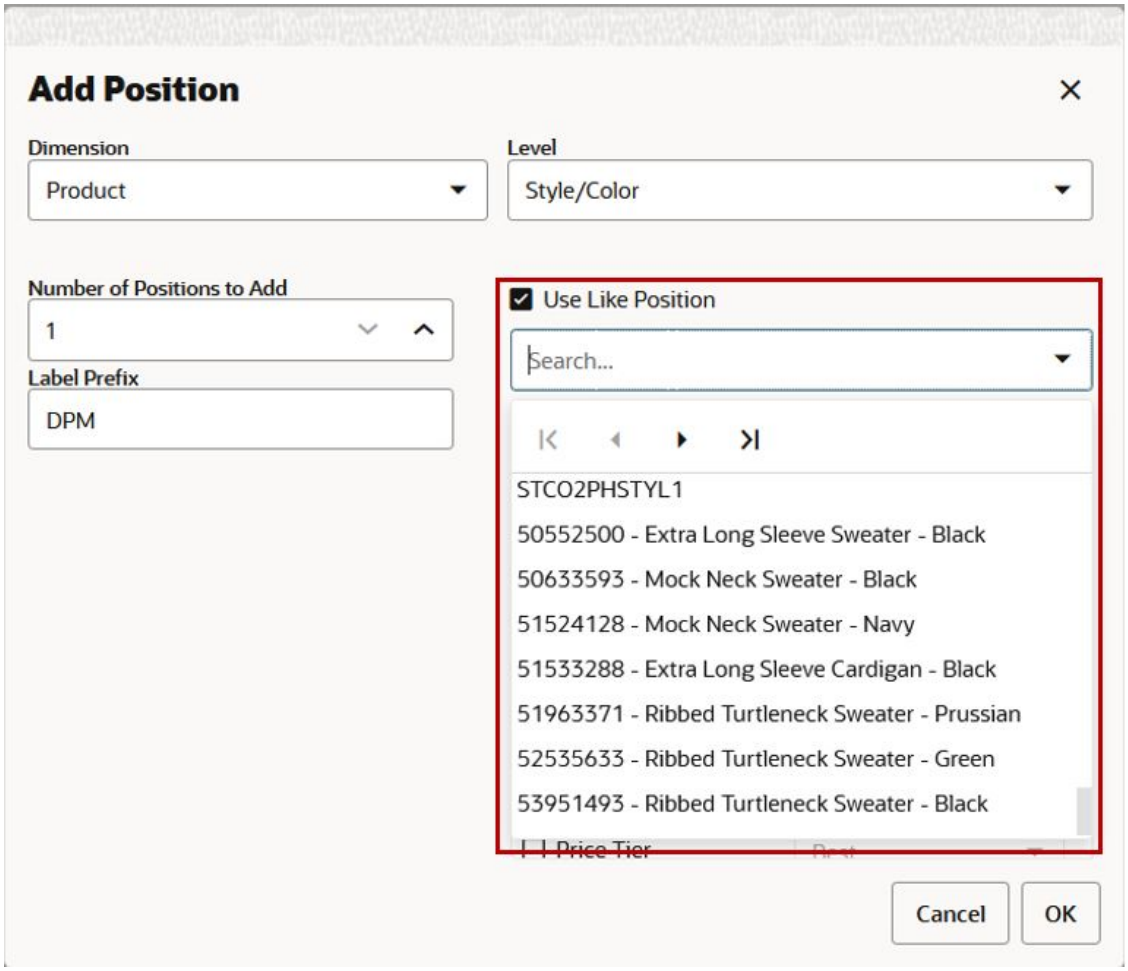
Figure 14-8 Use Like Position



When a measure is not defined, the message *Like Position can only be used to copy attributes for the currently selected level* displays. When both the measure and the attributes are not present, the message *Like Position is not available for this level* displays and the **Use Like Position** checkbox is not available.

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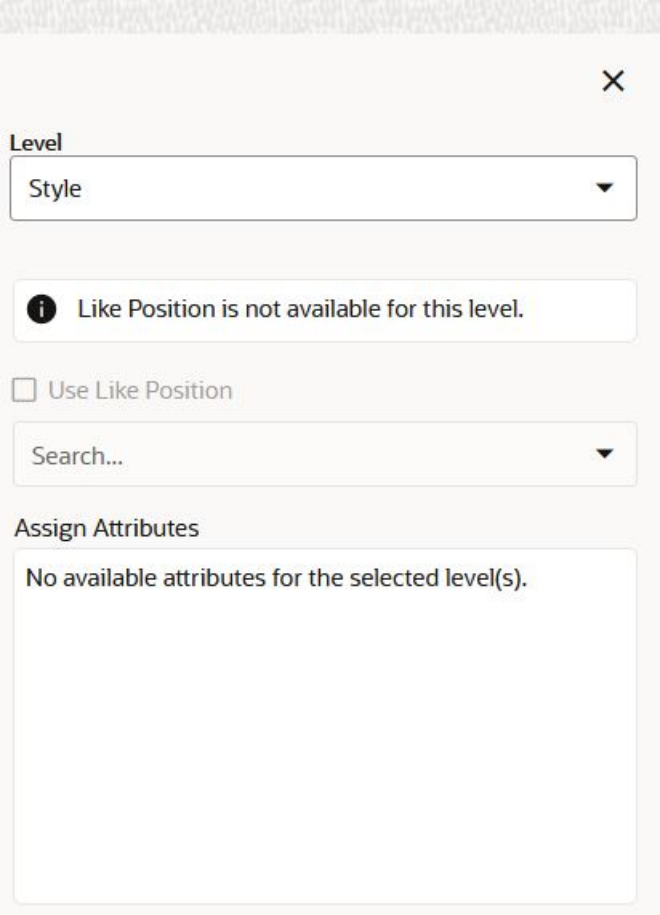
Figure 14-9 Like Position Not Available



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.
- Change the image associated with the informal position

> **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 Figure 14-11 window for the placeholder positions that must be modified.

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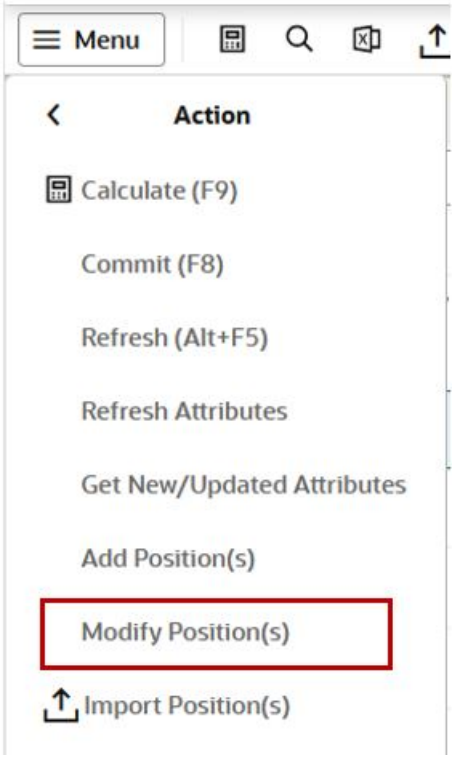
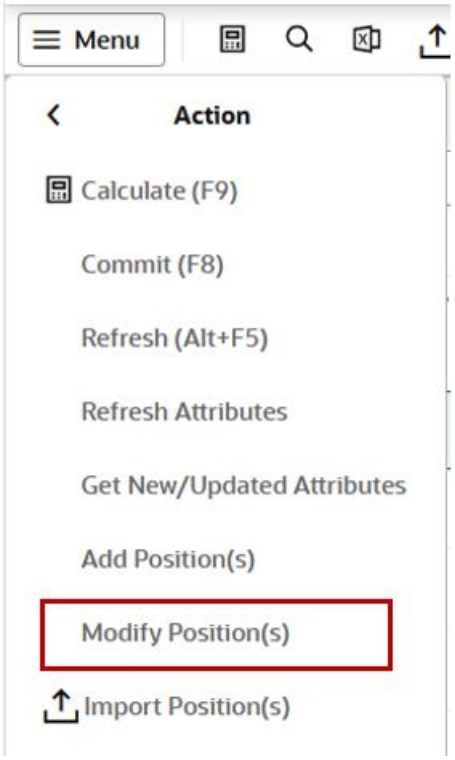
Figure 14-10 Action Menu -Modify Positions



2. The Modify Dynamic Position window opens. Select the desired dimension and level where you want to modify the dynamic position.

Figure 14-11 Modify Position



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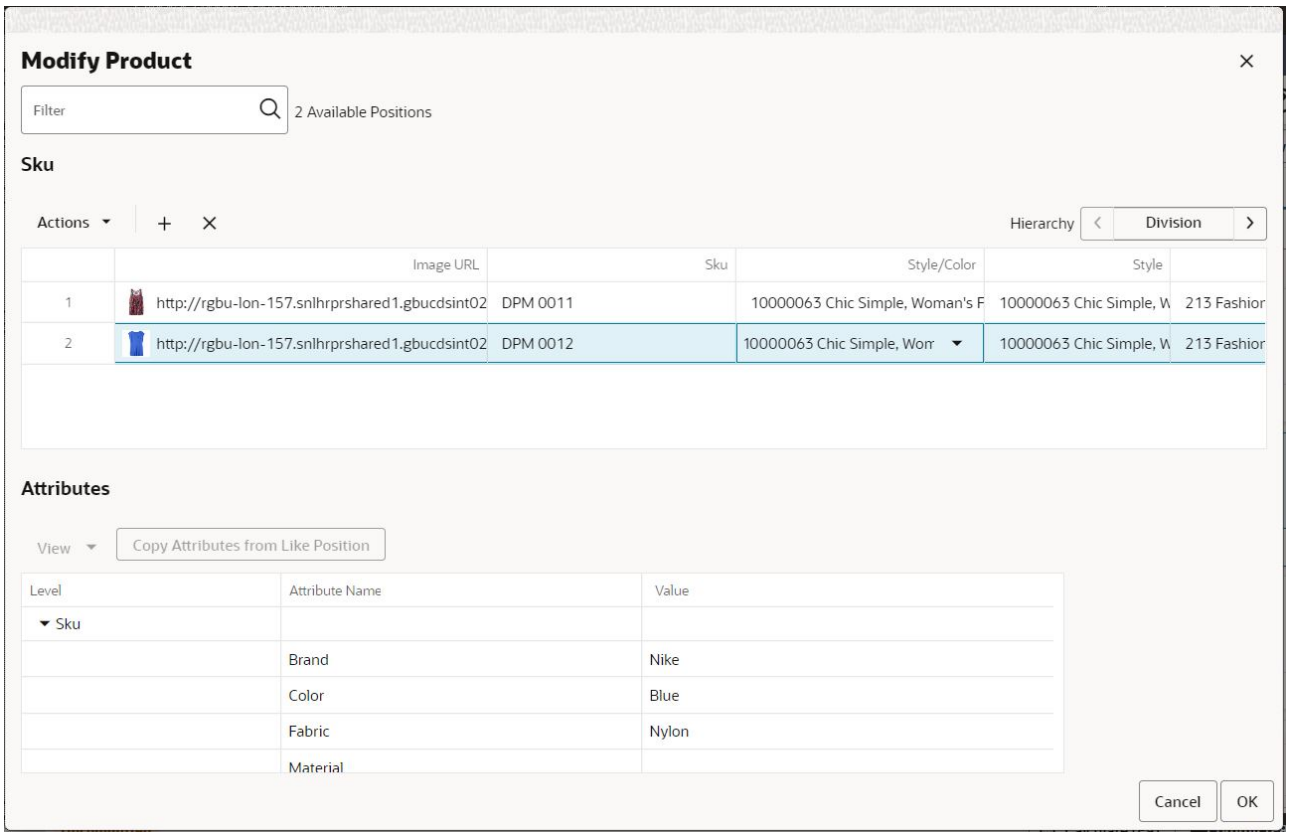
3. Alternatively, you can right- click one of the positions and select **Modify Positions** in the right- click menu, or simply click the placeholder position link. The Figure 14-11 window shows the positions for modifying at the launched dimension.
4. The Modify Product window opens. Select the existing dynamic position and then modify the position window label or position name. Alternately, 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 the image URL to update the image associated with position. You can also see that the Like Position column of the window contains the like position you set during the position creation.

Figure 14-12 Modify Product



5. 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 RPASCE displays an error message:
>
> ***Position [position_name] on [level] does not exists in current sub domain. DPM process cannot continue.***

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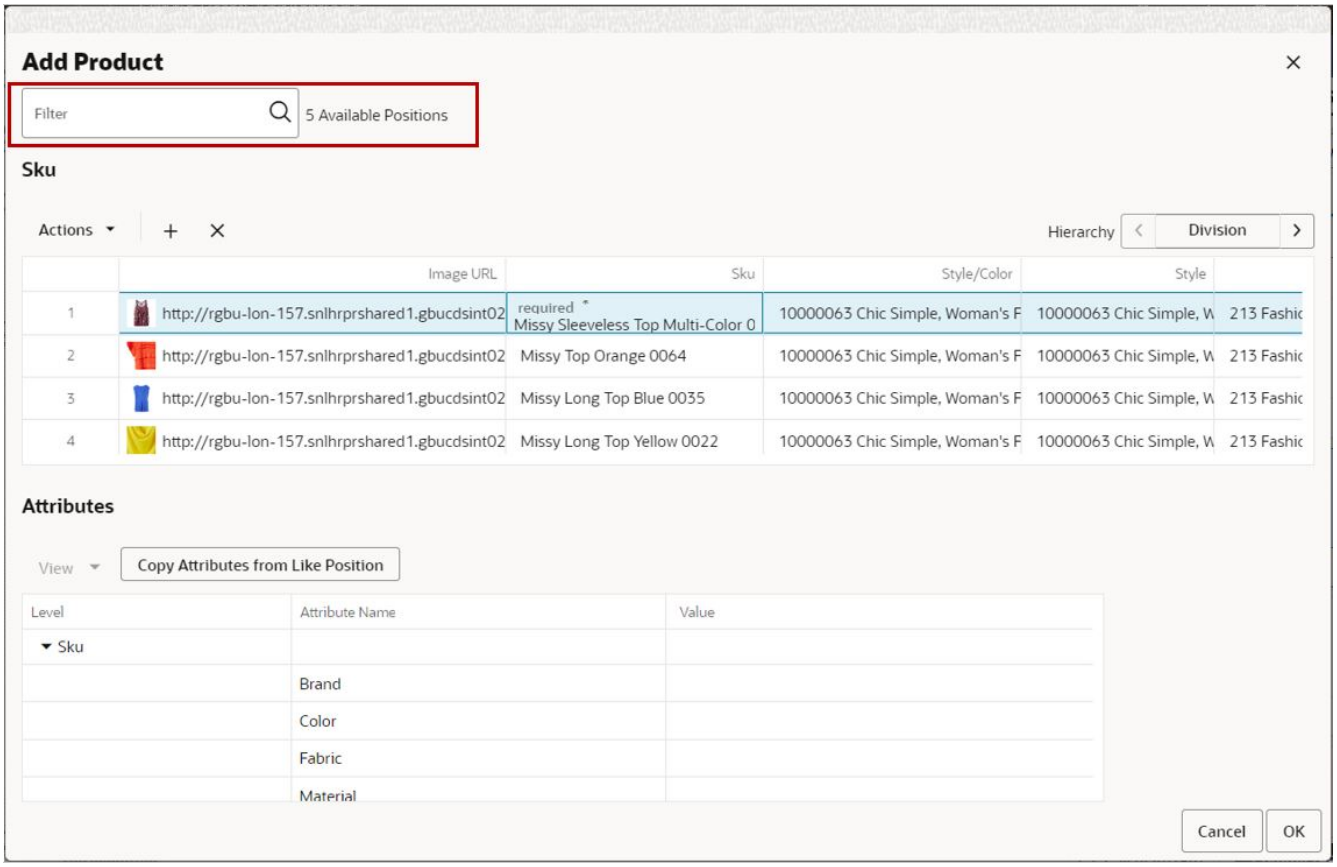
Search an Informal Position

You can search for a position in the list of the informal positions added. In the Figure 14-5 or Figure 14-12 window a search text box is available to locate the required position. The total number of informal positions available are displayed next to search text box. The search functionality makes it easy for you to find the required position and make modifications.

Figure 14-13 Search Box



Perform the following steps to search for an informal position in either the Figure 14-5 or Figure 14-12 window.

1. Enter your text characters in the search box to locate the position. You can search for position by position label or related parent position label. While entering characters, the matching results display in the list of positions.

   The number of matching positions available are displayed next to the search box. To remove the search result either delete the entered characters or click **X** within the search box.

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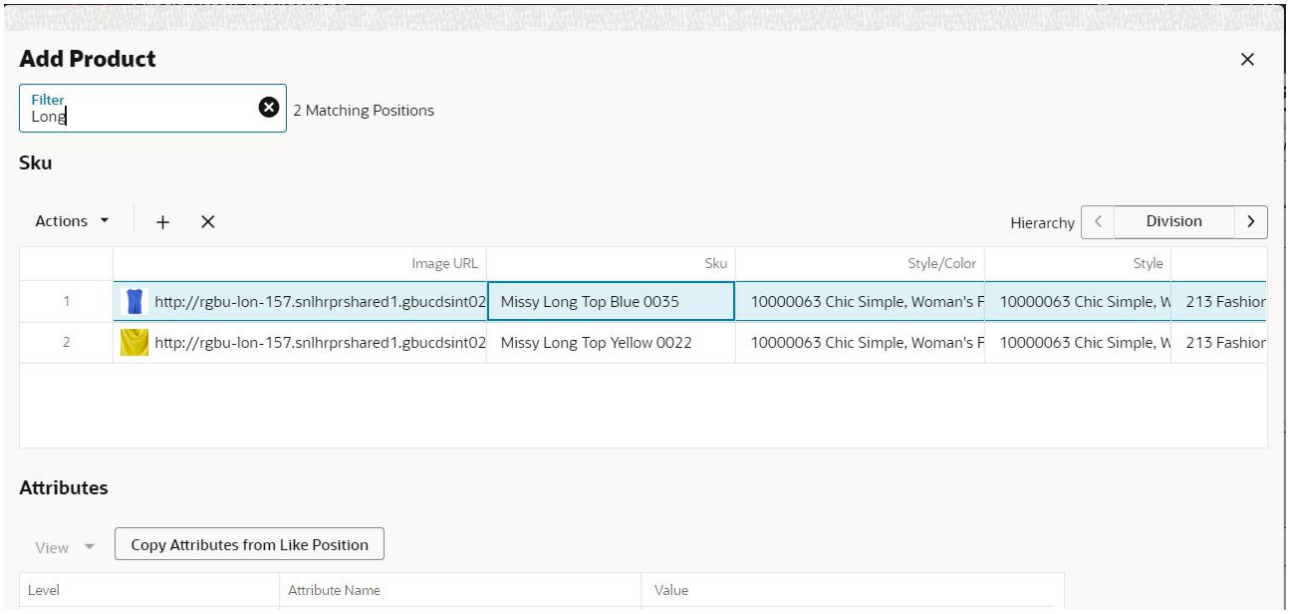
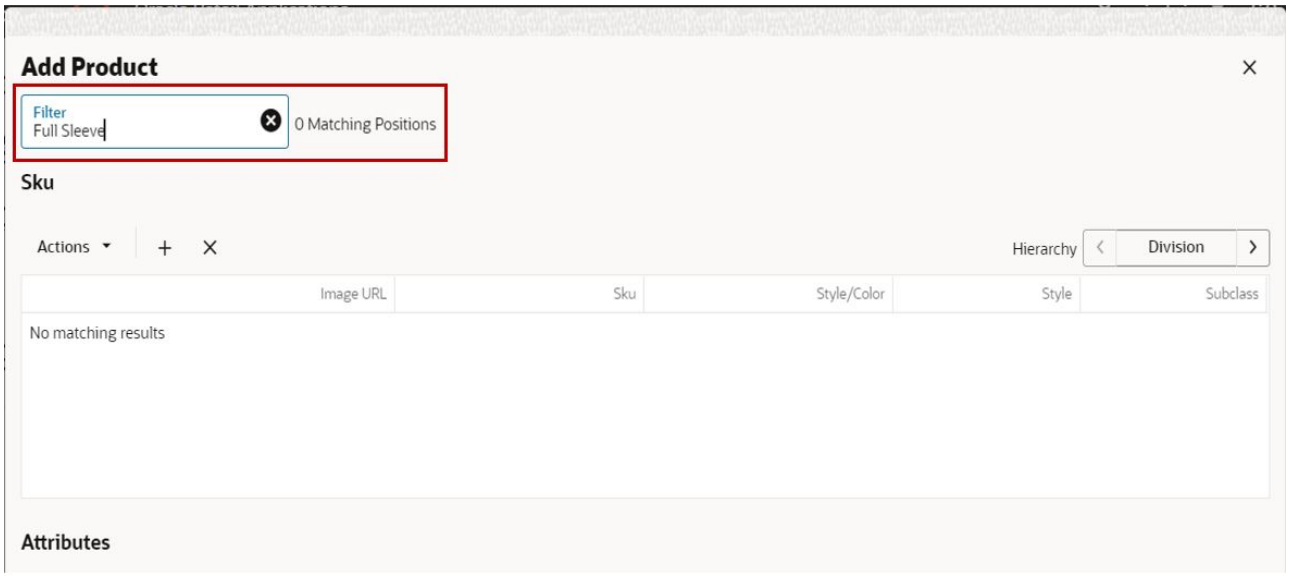
Figure 14-14 Search Position Result



2. If there are no matching positions, then the number of matching positions available displays **0 Matching Positions** as shown in Figure 14-15

Figure 14-15 Search Position – No Matching Position



Select All Positions

You can select all positions in the Figure 14-5 and Figure 14-12 windows with **Select All** from the action Menu. This option helps in selecting all the informal positions in the Figure 14-5 and Figure 14-12 windows.

1. Select the Action menu and then select the option, **Select All** to select all the informal positions in the Figure 14-5 and Figure 14-12 windows.

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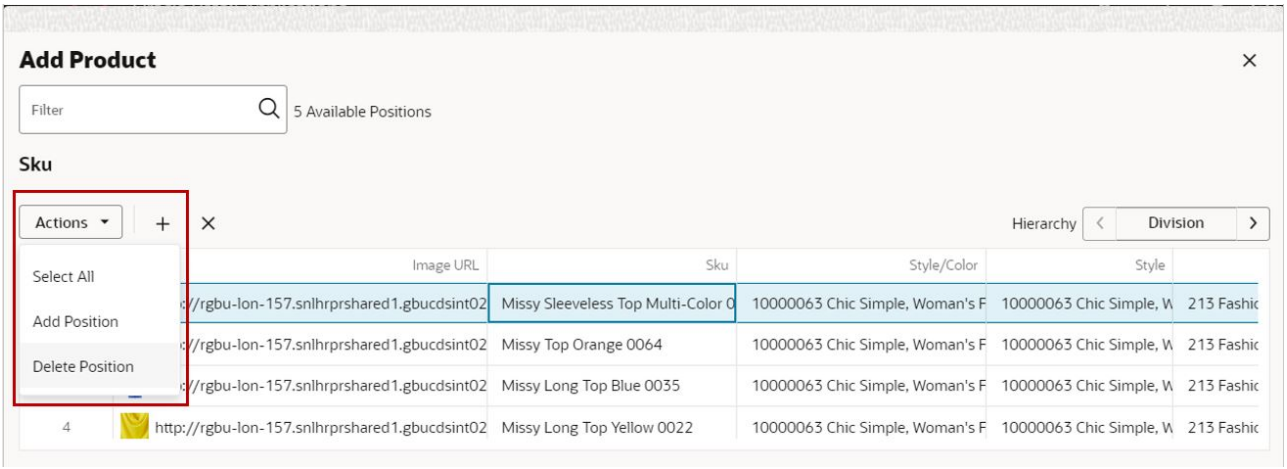
Figure 14-16 Select All Position



Deleting an Informal Position

After a dynamic position is added, you can delete it and all of its 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.

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

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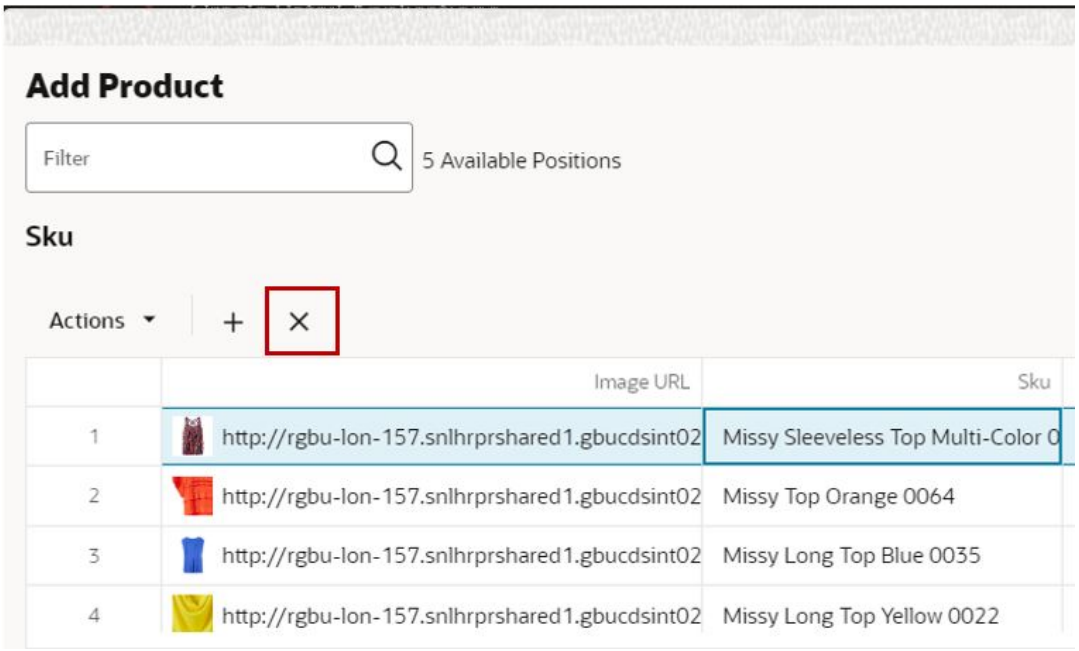
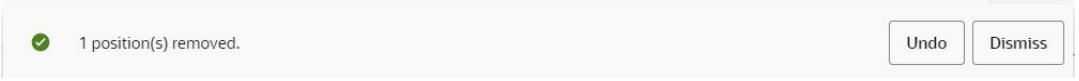
Figure 14-17 Delete Position



3. The Delete Dynamic Position window opens to indicate the dynamic position that will be deleted and any child positions associated with it are also deleted. Click **OK**.

Figure 14-18 After Deletion



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

Figure 14-19 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 Caridgan - Black	0.00	0.00
DPM0000030	54291800 - Contrast Elbow Patch Caridgan - Black	0.00	0.00
DPM0000031	73137693 - Merino Wool Flutter Cardigan - Dark Pearl	0.00	0.00

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Copy and Paste Data Within the Add or Modify Product Dialog Boxes

You can Copy and Paste data from external application to modify placeholder positions. Copy and Paste functionality helps in transferring data between an external application and the Add Product or the Modify Product dialog box. This helps you to quickly update multiple positions or a range of cells while adding or modifying the placeholder positions.

To Copy and Paste data from external application, select the data and use the keyboard shortcut keys **Ctrl+C** to copy and use **Ctrl+V** to paste.

Importing Placeholder Positions

Use Import Positions to manually import a list of placeholder positions and associated images that you have already entered in an Excel (.xslx) file format. It loads the positions listed in the file to the Figure 14-24 for validation and highlights errors when corrections are required. This functionality can be used for the bulk creation of placeholder positions and adding images for the informal position.

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.

Perform the following steps to import placeholder positions.

1. To import placeholder positions, click the **Import Positions** icon on the Quick Access Toolbar as shown in Figure 14-20.

   Alternately, select the **Import Positions** menu item in Action Menu or perform a contextual launch of **Import Positions**.

Figure 14-20 Import Placeholder Icon

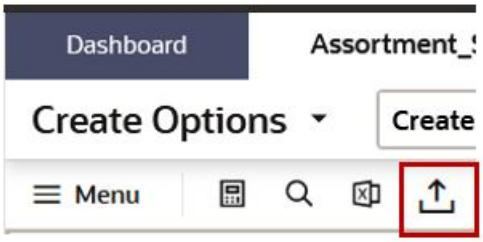

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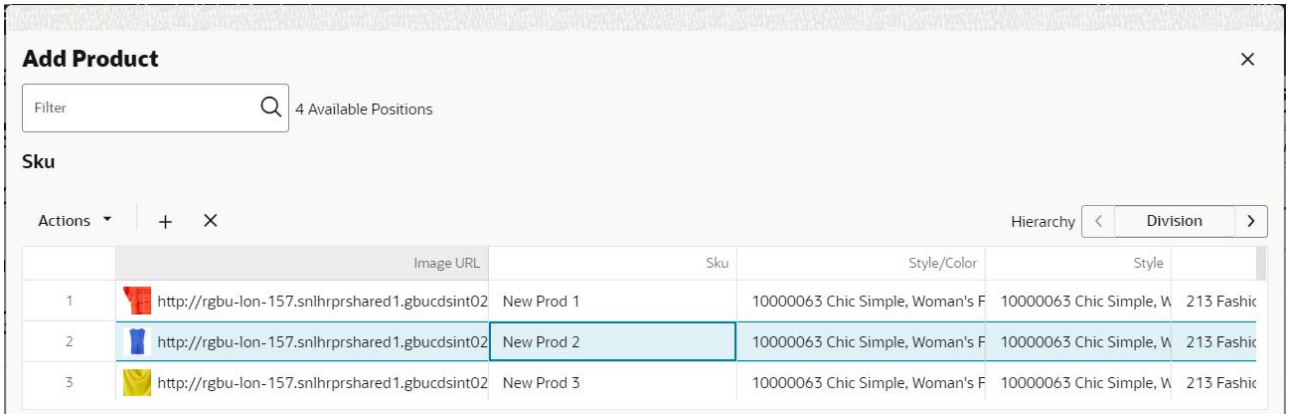
Figure 14-21 Imported Placeholder Positions



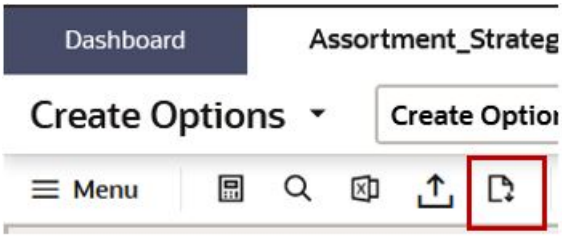
2. After selecting the Import Positions icon or menu, you are redirected to select the file for upload. The selected file is uploaded to the server and processed.
   - If the import fails, this error message displays: *The file import failed. Check the file format and try again*.
   - If the import is successful, this message displays: *Item list imported successfully*.
3. The Add Positions window opens populated with the imported files positions. You can edit, modify, or delete the imported informal position records. If a validation failure occurs, an additional message displays.

Download and Update the DPM Import File Template

Perform the following steps to download and update the DPM Import File template.

1. To download the file template, click the **Download DPM Import File Template** icon as shown in Figure 14-22.

Figure 14-22 Download DPM Import File Template Icon



2. Select the dimension and level.

   After clicking the **Download DPM Import File Template** icon, you are presented with the **Select Dimension and Level** dialog box. Select the dimension you want to import (for example, Product, location) and then select the level for the specific Dimension (for example, the Product dimension levels can be Style, Style/Color, Item).

   Click **OK** to download a template for the selection dimension and level. You can import up to the lowest level of the dimension supported by the workbook.

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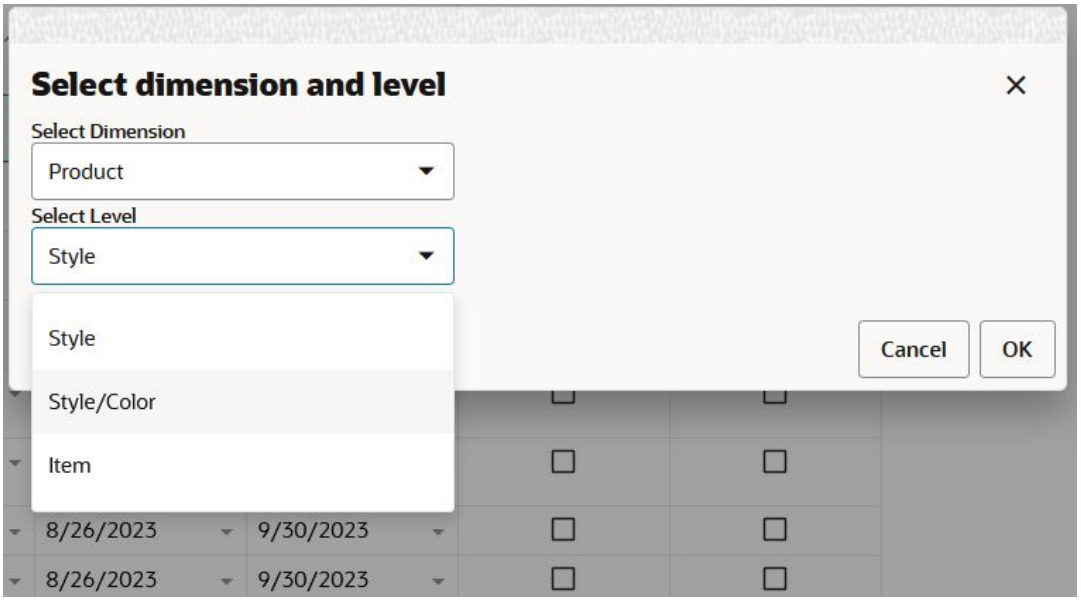
Figure 14-23 Select Dimension and Level



3. To add multiple positions, complete the downloaded Excel template and then upload it using Import Placeholder Position. This helps in easy addition of multiple placeholder positions.

   The downloaded template has a pre-defined format for each level with various fields to entre. Depending on your selected level, the format of the template changes. The downloaded template presents an example to show how to fill out the template. To add more positions, copy the example and create new line items in an Excel template.

Table 14-1 Template Level Descriptions

Template Level	Template Description	Template Sheets	Template Columns	Input Fields
Style Color	Consists of two sheets. This template requires you to fill in details related to the style color and its parent style.	Company	Dimension	Dimension at which you need to add position.
			Level	Dimension level at which the position is added.
			Label	Name of the new style color position added.
			Is Parent New	To specify if the parent is new or existing for the new position.
			Parent Level	Dimension level of the parent to which the new position belongs to. For style color it is Style.
			Parent Label	Name of the parent to which the new position belongs. It can be either new or existing. For new parent style, additional row is provided for adding in the same template
			Attribute Name	Name of the attribute, such as Brand, Color, and so on.
			Image URL	Image URL for the style color position.

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Table 14-1 (Cont.) Template Level Descriptions

Template Level	Template Description	Template Sheets	Template Columns	Input Fields
			Attribute Value	Value of the attribute with respect to the new position. For reference, few examples are mentioned in template.
		Style UDA 1	Parent Label	Style UDA value
Style	Consists of two sheets. This template requires you to fill in details related to the style only.	Company	Dimension	Dimension at which you need to add position.
			Level	Dimension level at which the position is added.
			Label	Name of the new position added.
			Is Parent New	To specify if the parent is new or existing for the new position.
			Parent Level	Dimension level of the parent to which the new position belongs. It can be either new or existing. For style color it is always Style.
			Parent Label	Name of the parent to which the new position belongs to.
		Style UDA 1	Parent Label	Style UDA value
Item	Consists of three sheets. This template requires you to fill in details related to item and style/color.	Company	Dimension	Dimension at which you need to add position.
			Level	Dimension level at which the position is added.
			Label	Name of the new item position added.
			Is Parent New	To specify if the parent is new or existing for the new position.
			Parent Level	Dimension level of the parent to which the new position belongs. It can be either new or existing. For style color it is always Style.
			Parent Label	Name of the parent to which the new position belongs to.
			Attribute Name	Name of the attribute style/color, such as Brand, Color, and so on.
			Attribute Value	Value of the attribute for style/color. For reference, a few examples are mentioned in template.
			Image URL	Image URL for the style color position.
		Vendor	Parent Label	Name of the vendor for the new item position.
		Brand	Parent Label	Name of the brand for the new item position.

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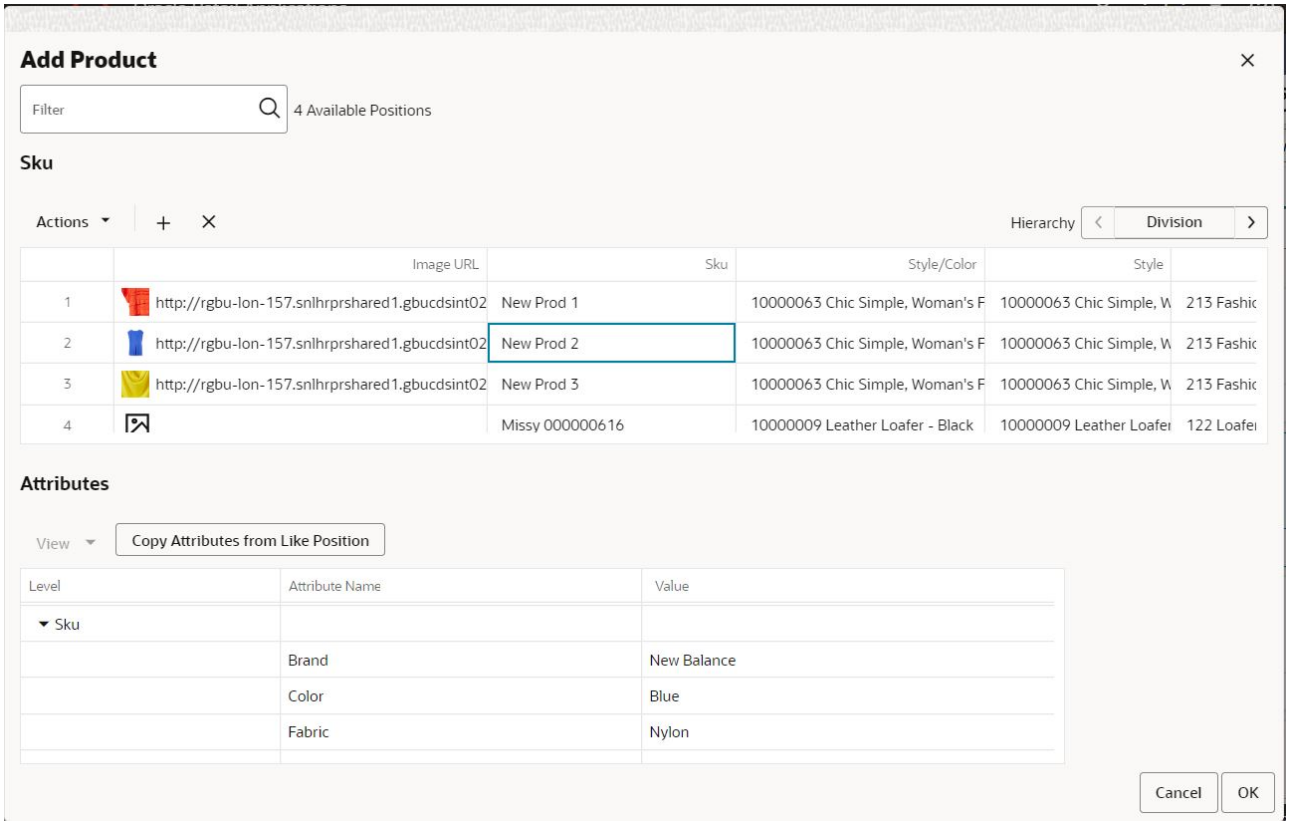
4. As the upload occurs, it loads the position list to the Figure 14-24 where you can validate and correct any errors.

   To add the positions, click **OK**.

Figure 14-24 Add Product Window



Points to Remember when Importing Placeholder Positions

- The item level position adding is enabled only in Item planning.
- The entry in format for Dimension, Level, and Attribute name should be same as given in format. If the value entered is incorrect the DPM import will fail and it shows an error describing which row has the issue.
- The image uploaded for the position defaults to both the thumb and full image. The image is designated as the main facet for the First Media Attribute.
- The value of attributes, parent label can be added or changed post uploading the template in the Figure 14-24.

  The DPM import shows an error if there is an attribute value not entered or faulty while uploading. Figure 14-25 displays an example of import errors. Fields with errors can be modified on the Add Product dialog window

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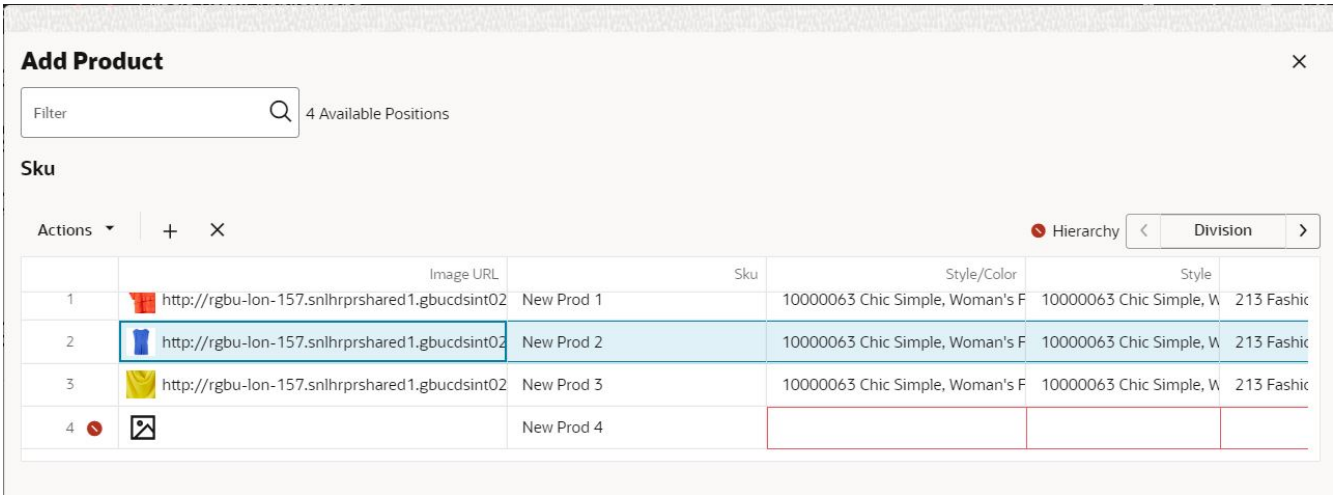
Figure 14-25 Highlighted Errors in the Add Product Window



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.

Add Images for a Placeholder Position

You can add an image URL for informal positions from the Add Product window. The image URL added for the position defaults to both the thumbnail and full size image designated to the main facet for the first media attribute. The image URL field is an optional field, so you can skip the specification of an image.

You can add bulk images along with the Excel template while importing the placeholder position. The Excel template for DPM has the field for entering the image URL. The image associated with the placeholder position helps in visual reference for the planner.

To add an image from the Add Product window, then enter the valid image URL in the first input text field provided. Along with the text field, you see an error icon at the row header when the image URL is not valid. The image URL field is also highlighted by a red boundary when there is an error as shown in Figure 14-27.

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Figure 14-26 Image URL - Add Product

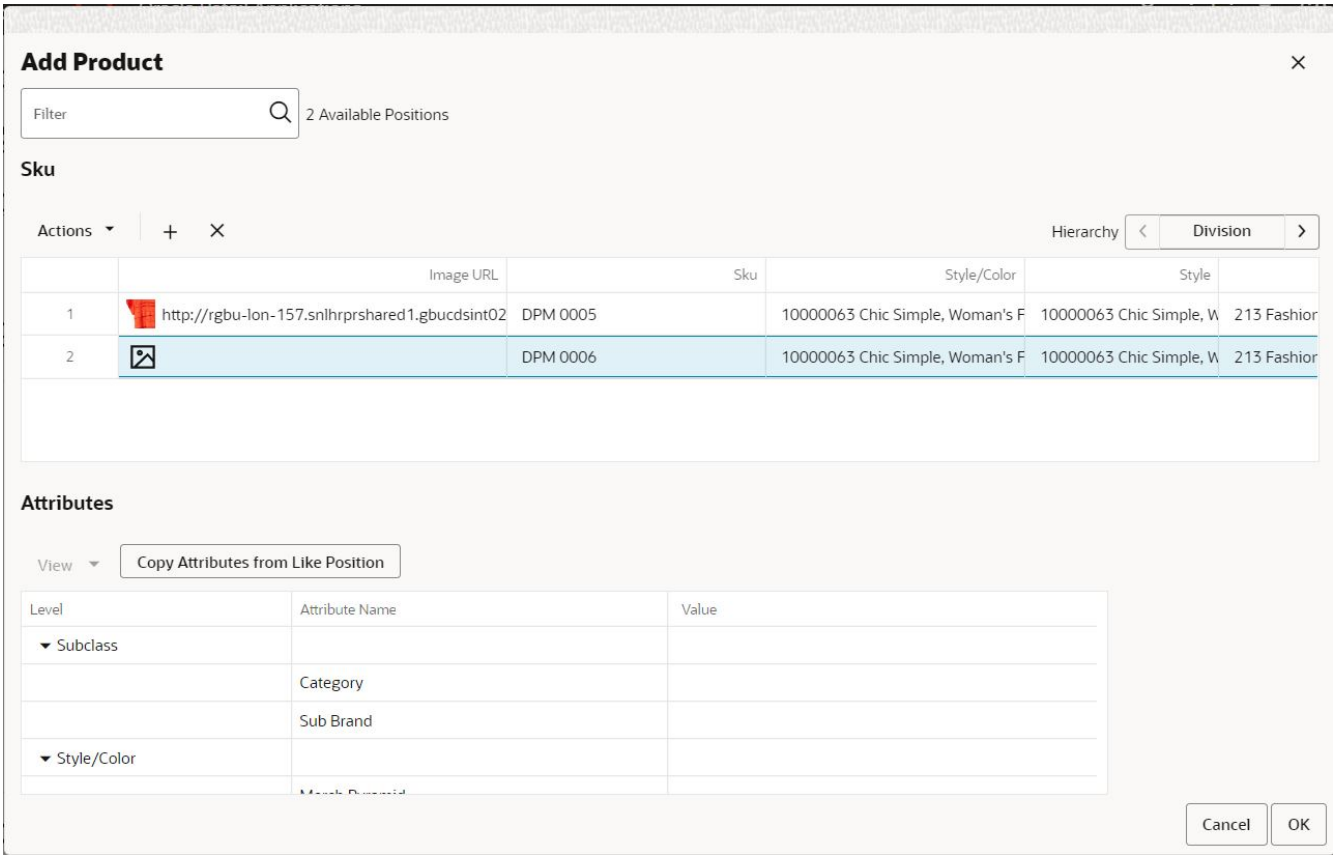
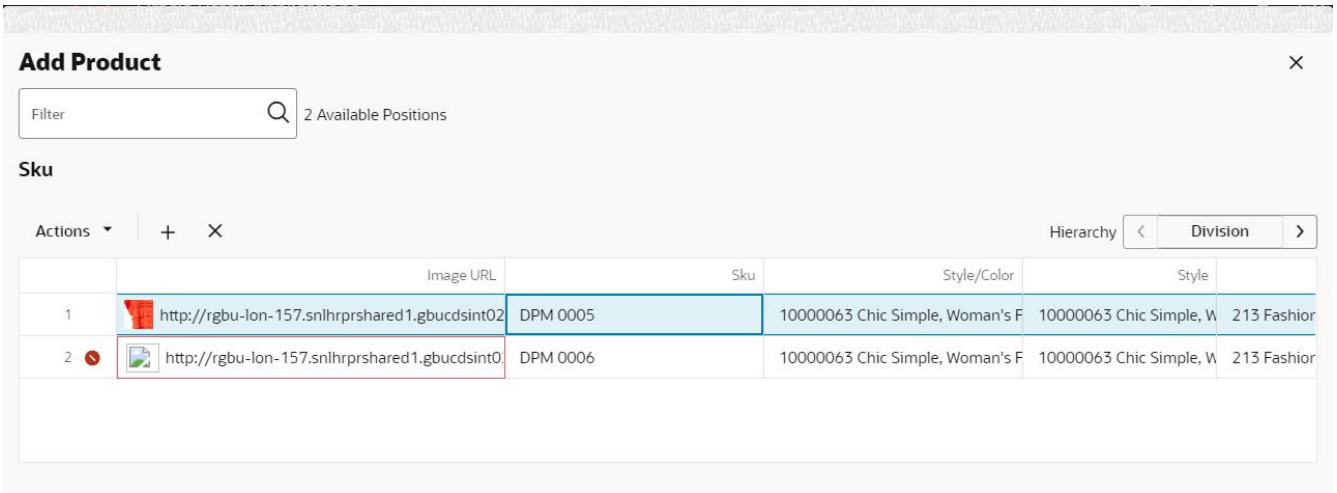


Figure 14-27 Error Validation in Image URL



Validations in Add or Modify Product Windows

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

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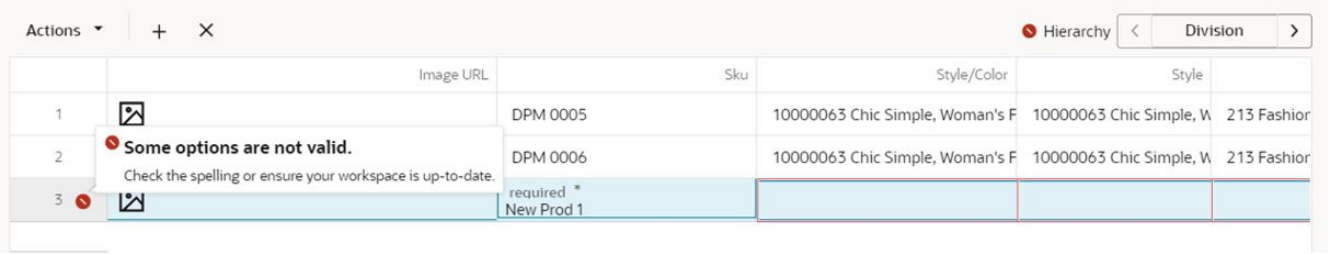
boundaries. When you hover over the error icon, a tool tip with the following message appears: *Some options are not valid. Check the spelling or ensure your workspace is up-to-date*.

Figure 14-28 Validation Errors



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

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Real Time Alerts

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

Configuring Real Time Alerts

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

Alert Definition

Real time alerts are configured in workspace 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 alert hit occurs. This may be a measure used in the alert measure's rule, for example, **FcstQty** , 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 will be visible even if the measure is hidden in the primary view. You can see real time alerts and navigate to the respective alerts even if the target measure is hidden or placed on

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the z-axis with lower levels than the alert definition. 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 using the Format dialog in Edit Styles and Exceptions. The styles are used to format target measure cells with the condition.

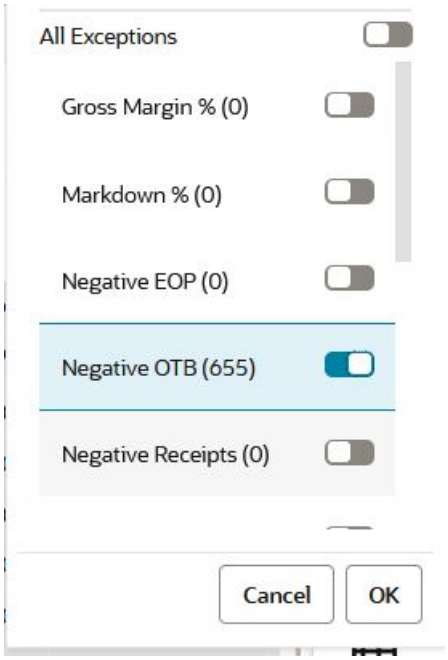
Working with Real Time Alerts

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 15-1 Quick Access Toolbar Alerts



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

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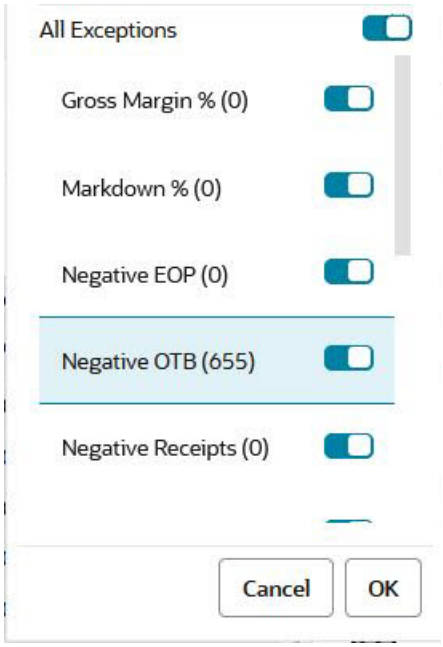
Figure 15-2 Select All Exceptions for Alerts



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 15-3, the active alert is the **Negative OTB** 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.

> **Note**
>
> Real time alerts can be sorted either by alphabetical order or based on priority. By default, the alerts are sorted by the priority set in Configuration Tools. An Administrator can change this setting using the self-service configuration property and choose to sort the alerts either by priority or alphabetical order. For more details, refer to the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

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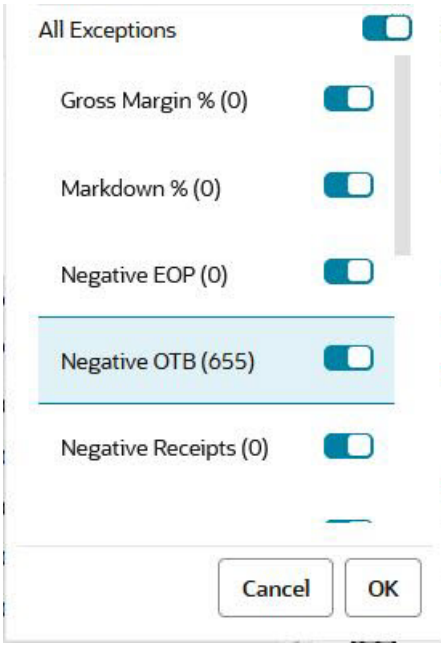
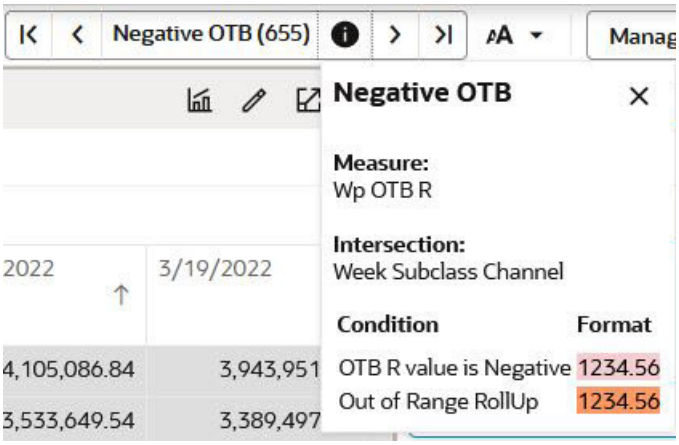
Figure 15-3 Select Multiple Exceptions for Alerts



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 15-4 Alert Summary



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.

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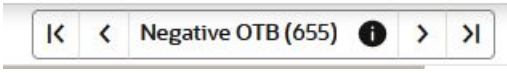
Figure 15-5 Enter Alert Navigation Mode



You can see that now you are in alert navigation mode, as highlighted in Figure 15-7. The alerted cell is highlighted in red, and the selected cell is highlighted in black.

Figure 15-6 Alert Navigation Mode

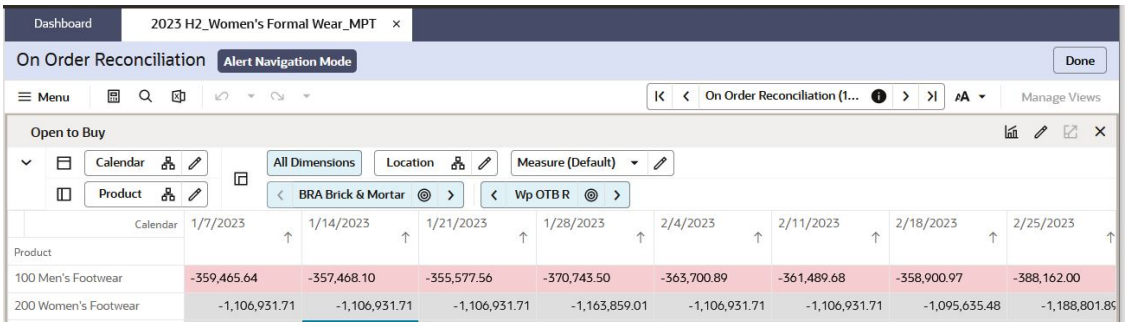
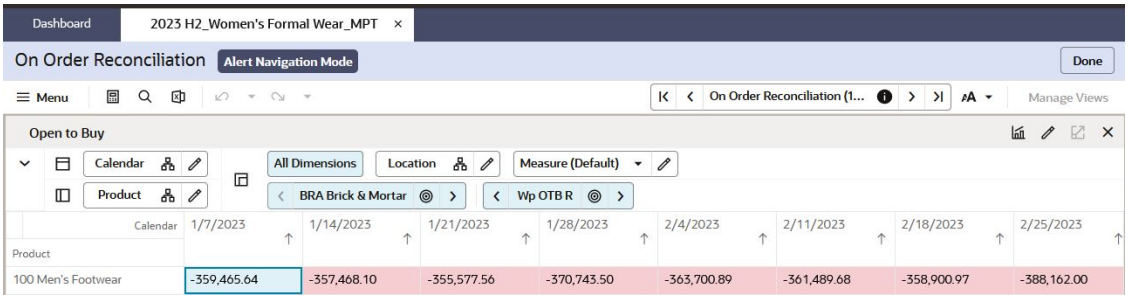


Figure 15-7 Alerted Intersections



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 15-8 shows the message that appears. In this case, Half 1 FY2023, which contains 26 hits, are hidden.

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Figure 15-8 Hidden Alerts

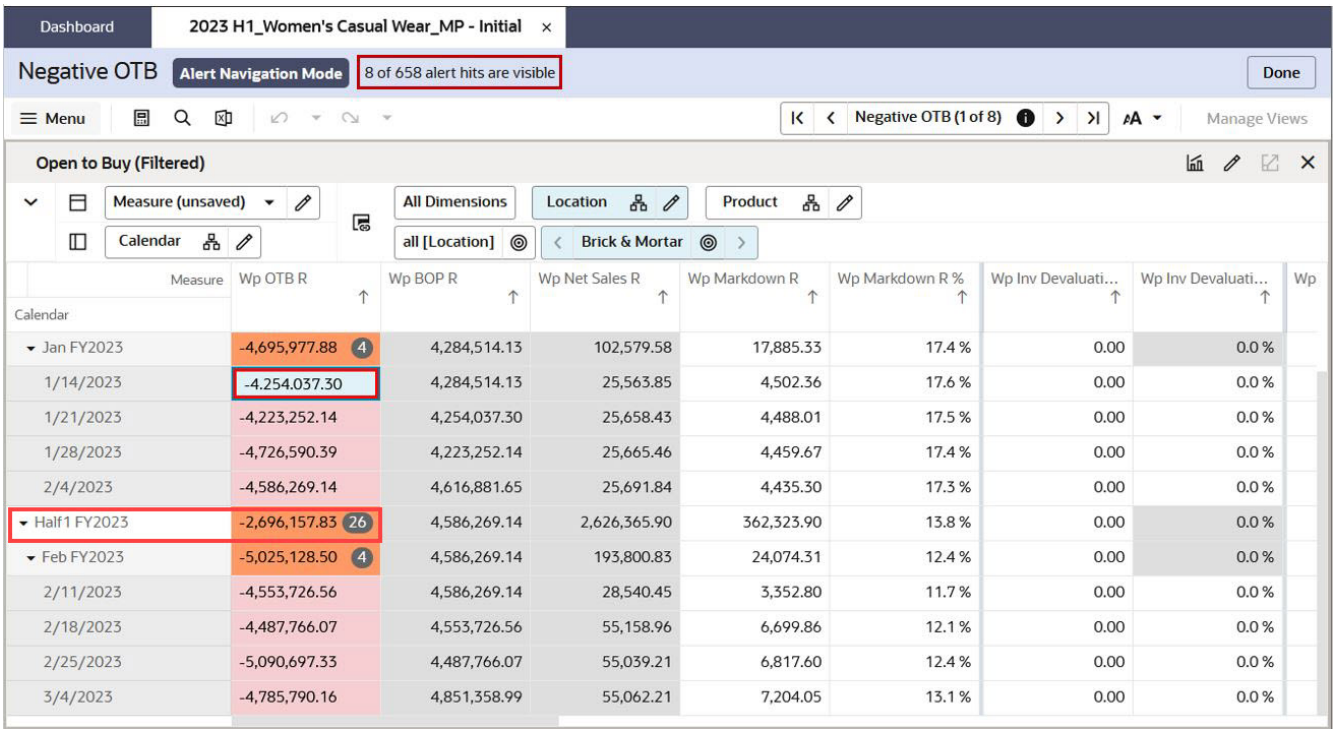
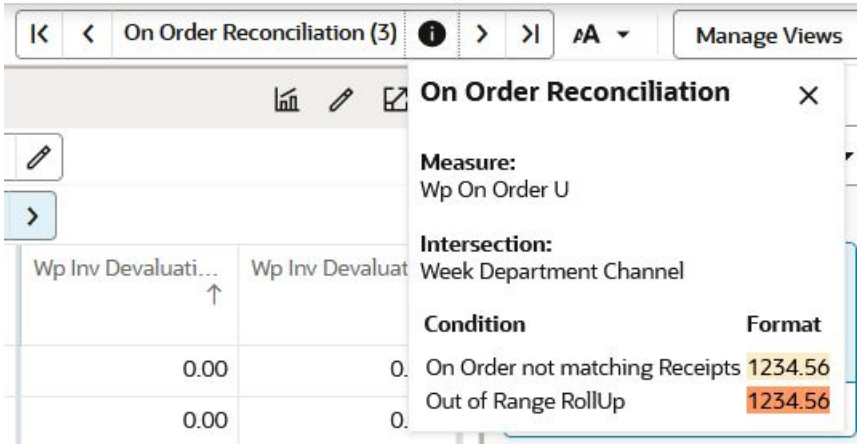


Figure 15-9 View Alert Intersections



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

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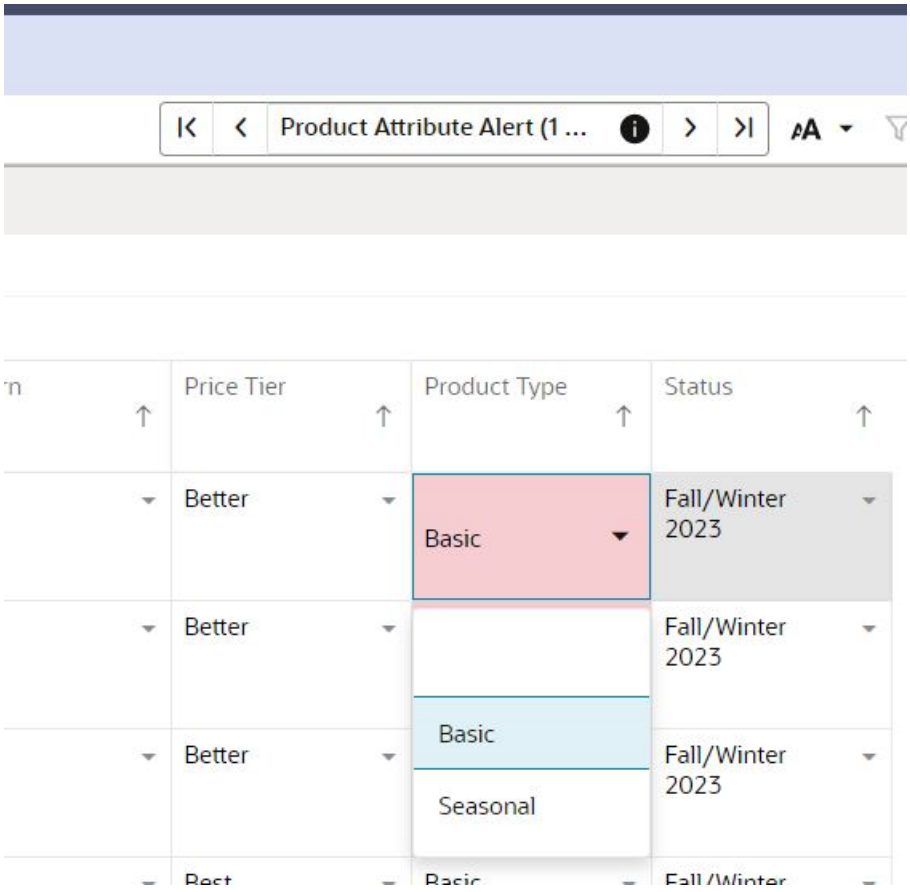
Figure 15-10 Resolving Alerts



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

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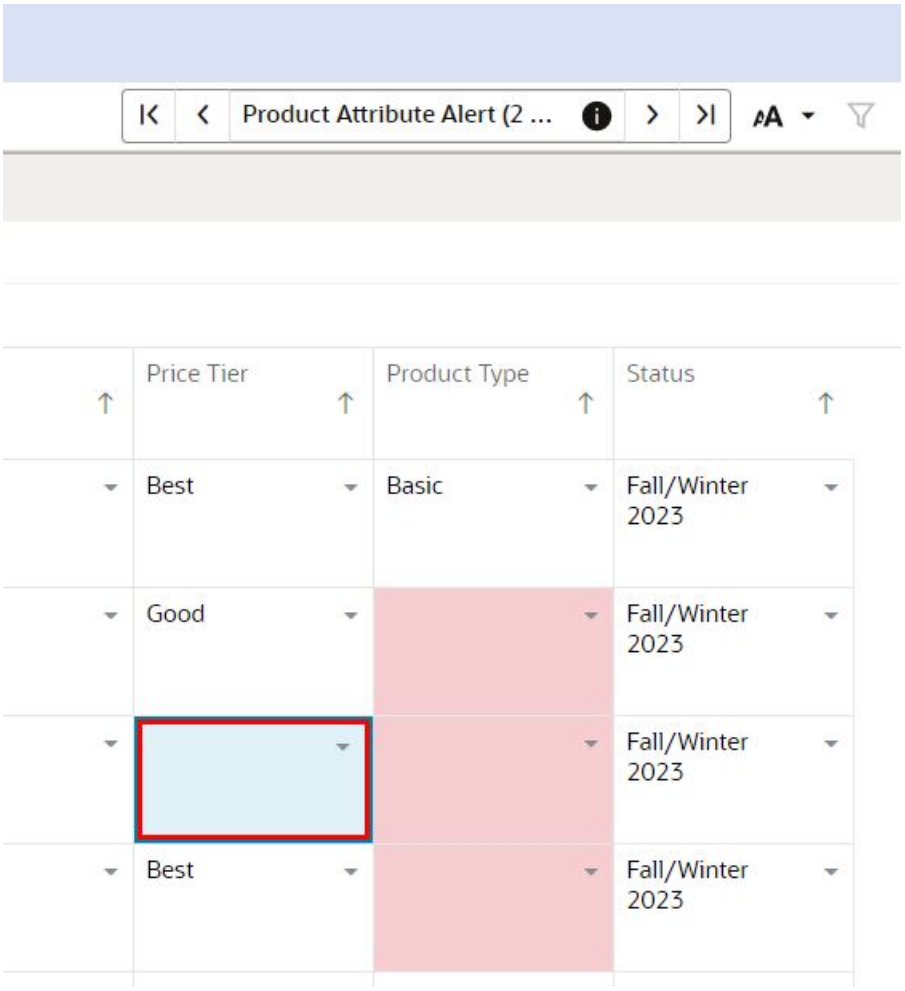
Figure 15-11 Moving Between Alerts During Resolution



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.

To exit the alert navigation mode, click **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 the Alert Navigation mode, you are left in that specific step or tab, but it is 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.

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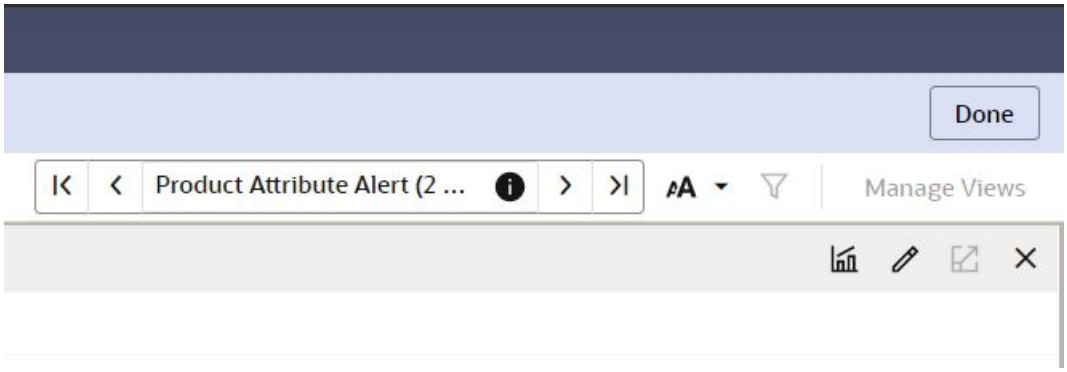
> **Note**
>
> To maintain the last or previous state of alert navigation, always remember to exit the alert navigation mode. If the session times out, the alert navigation will not maintain its previous state.

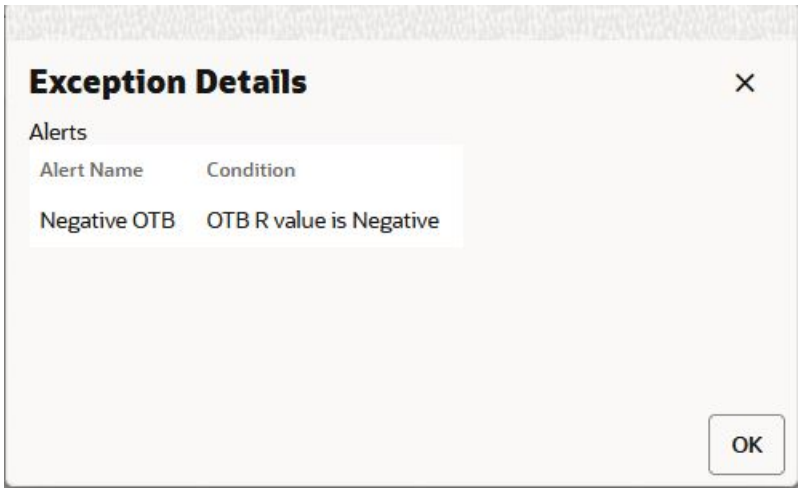
Figure 15-12 Exit Alert Navigation Mode



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 window, shown in Figure 15-13, which lists each alert hit on the cell in priority order, using 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 15-13 Example Exception Details Context Menu



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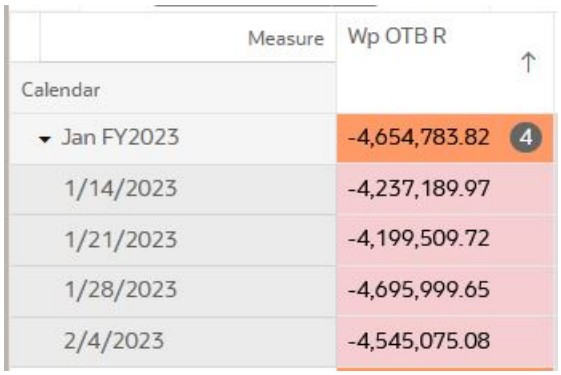
Note that if a rollup alert is configured, you will see a badge in rollup cells that displays the count of how many cells at the alert intersection have that alert. Figure 15-14 shows a rollup badge with alerts at Week rolling up to a count on Month.

Figure 15-14 Rollup Badge



Alert Formatting

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

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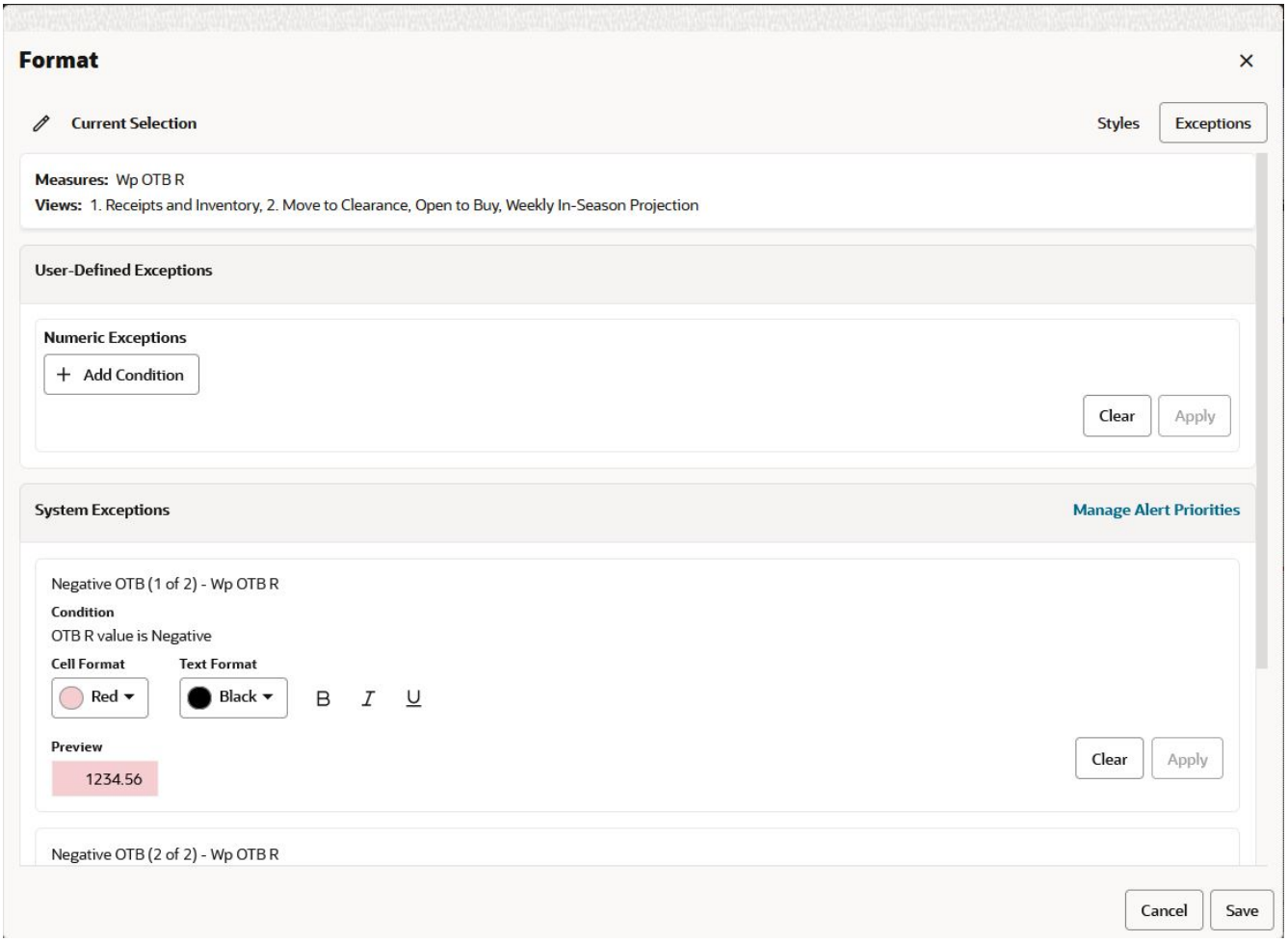
Figure 15-15 Alert Formatting



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.

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- 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.

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16

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.

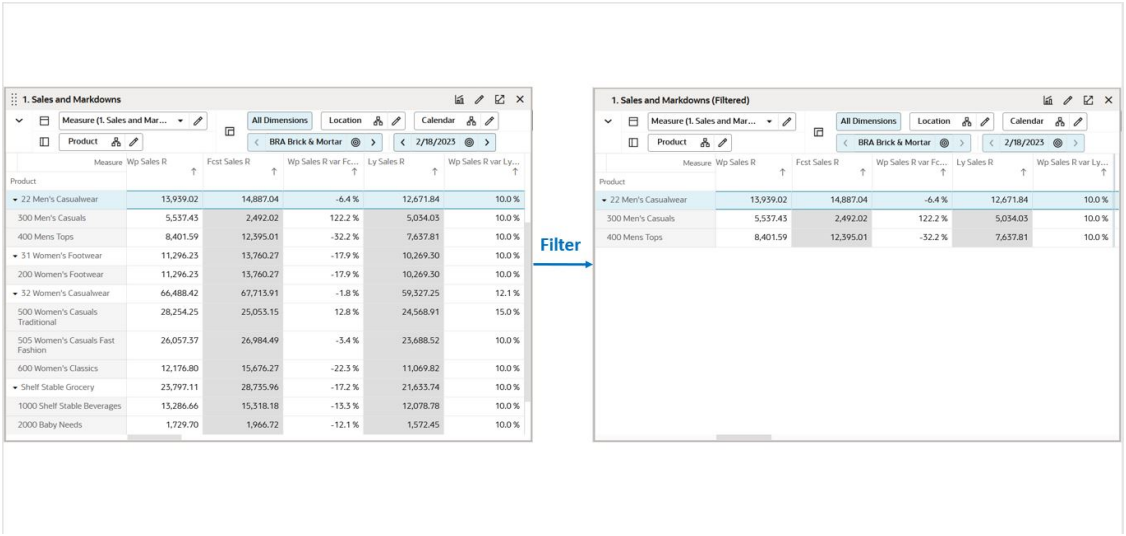
For example if one view shows a summary of targets by subclass, cluster (locations), and calendar and a second view shows a detailed breakdown of the assortment plan by style/color, cluster, and calendar you can use position filtering to quickly narrow your focus on the detail view to only those style/colors 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 non-selected 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 16-1, 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 16-1 Position Filtering in a Single View



In Figure 16-2, 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.

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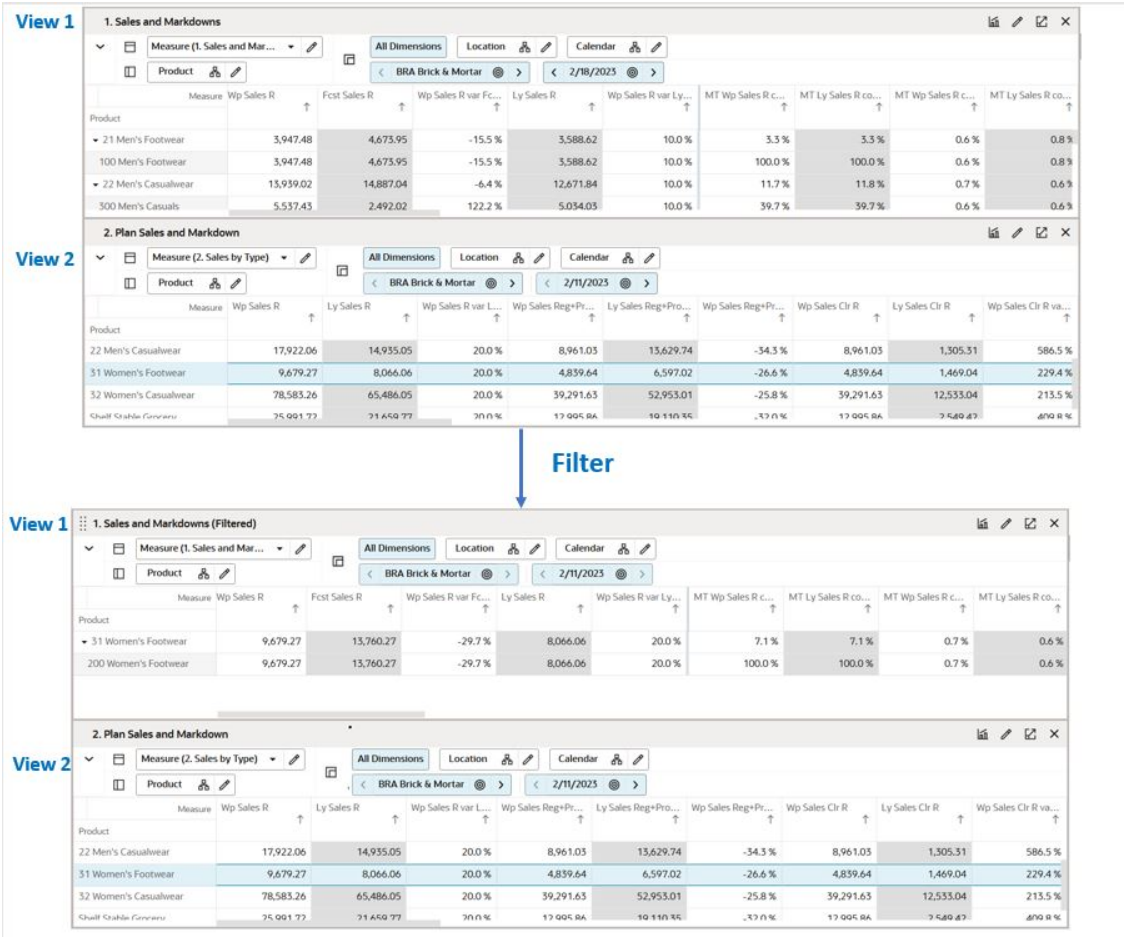
It is possible to create these position filters in multiple steps. You can apply a position filter in first view to the second view and then apply a position filter to a third view.

Figure 16-2 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 rows or columns 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 a 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 16-3. It can be applied to the current view or to other views in the worksheet.

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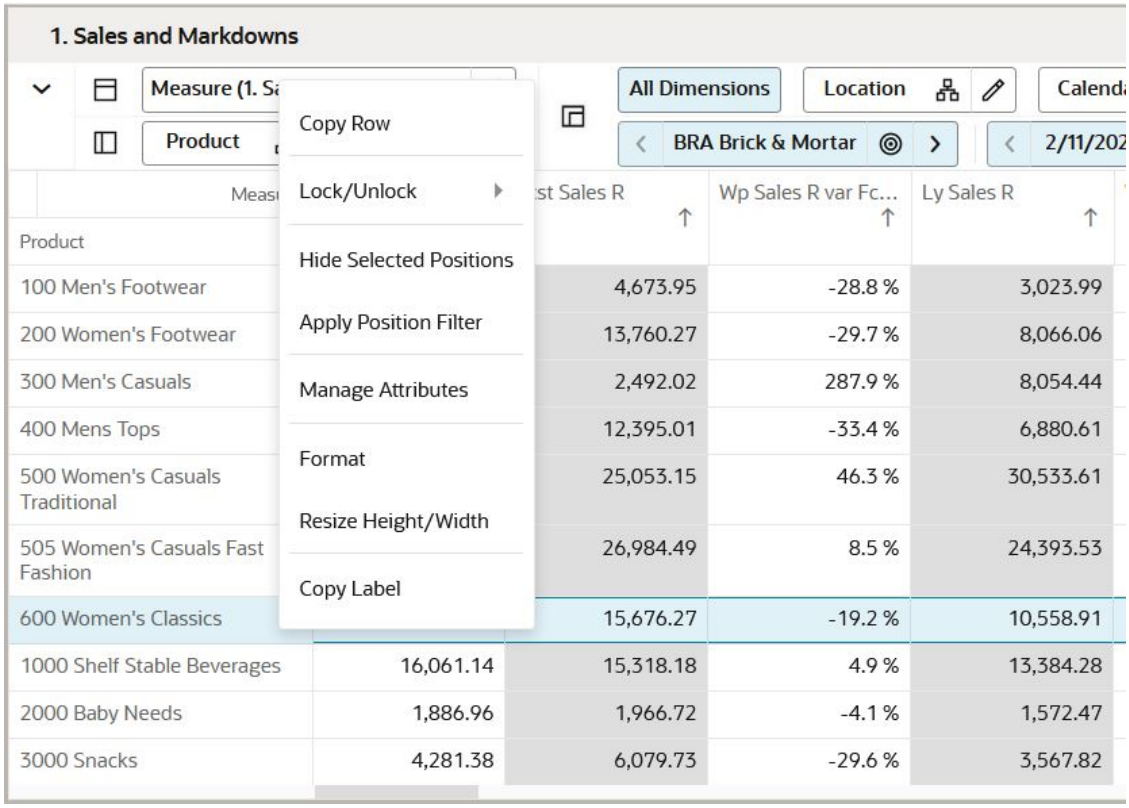
Figure 16-3 Position Filtering from Row or Column



Selecting from Cells

Position filtering can also be initiated by selecting one or more cells using the right- click menu, as shown in Figure 16-4. It can be applied to the current view or to other views in the worksheet.

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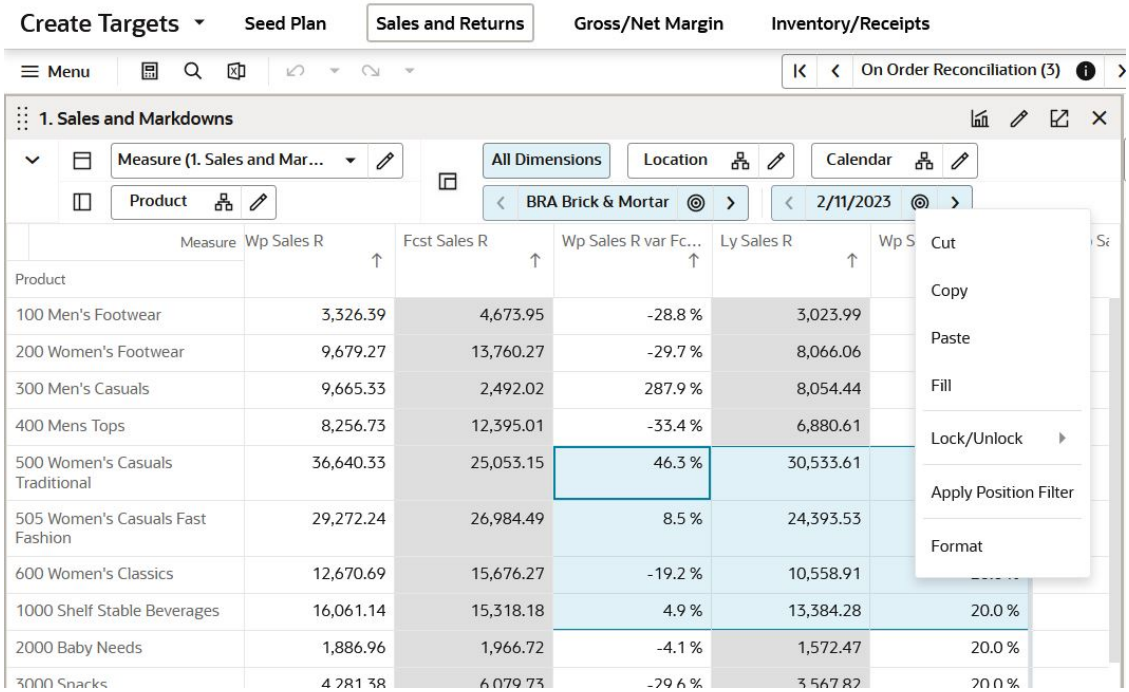
Figure 16-4 Selecting Position Filtering from Cells



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 window 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 window.

In Figure 16-5 and Figure 16-6, 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.

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Figure 16-5 Applying Position Filter on a View in Current Step

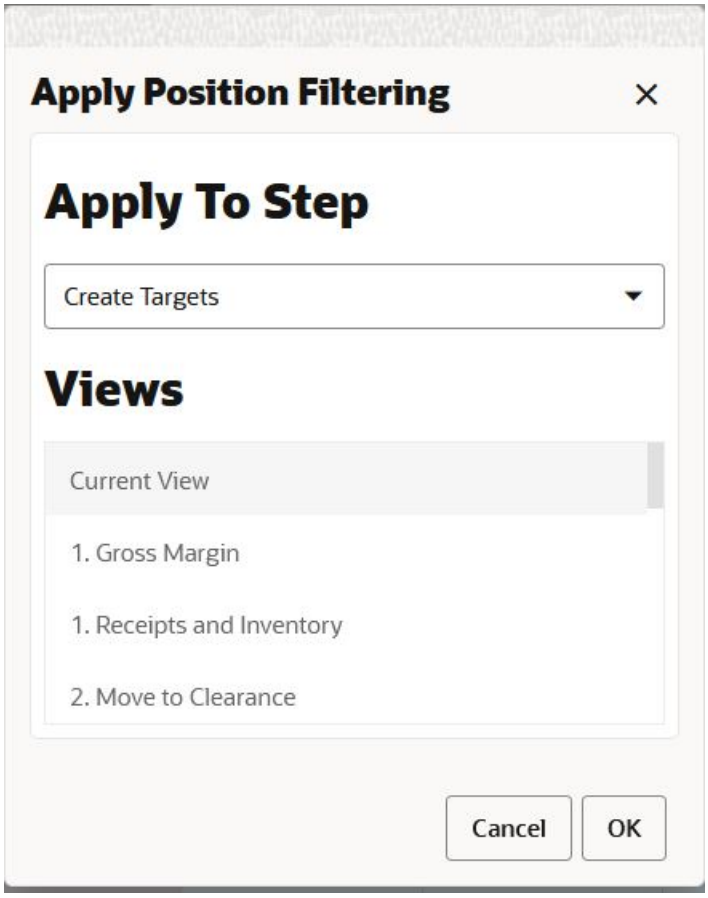

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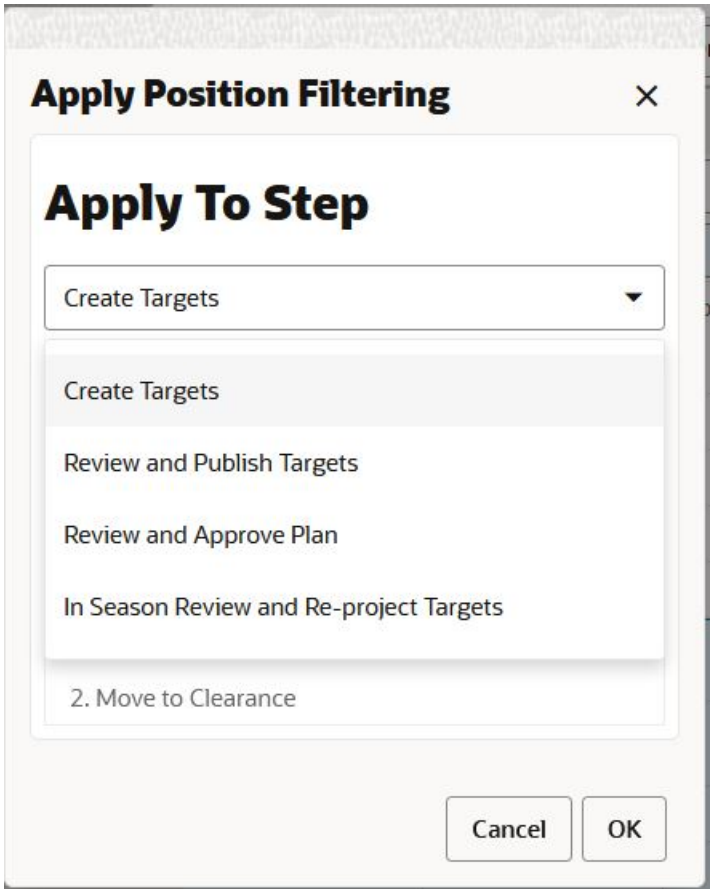
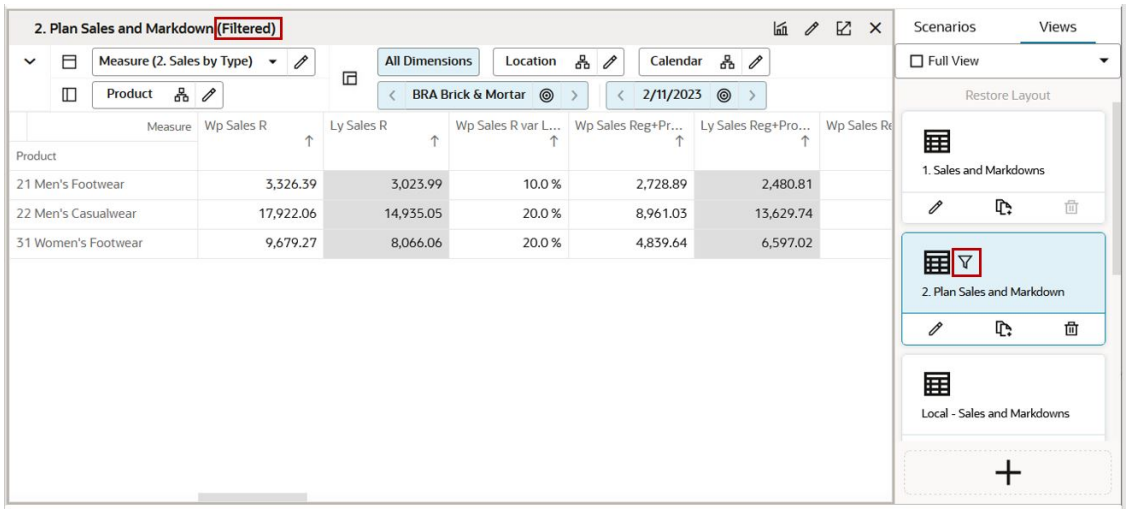
Figure 16-6 Applying Position Filter on a View in Different Step



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 16-7.

Figure 16-7 Position Filtering Icon and Filtered View



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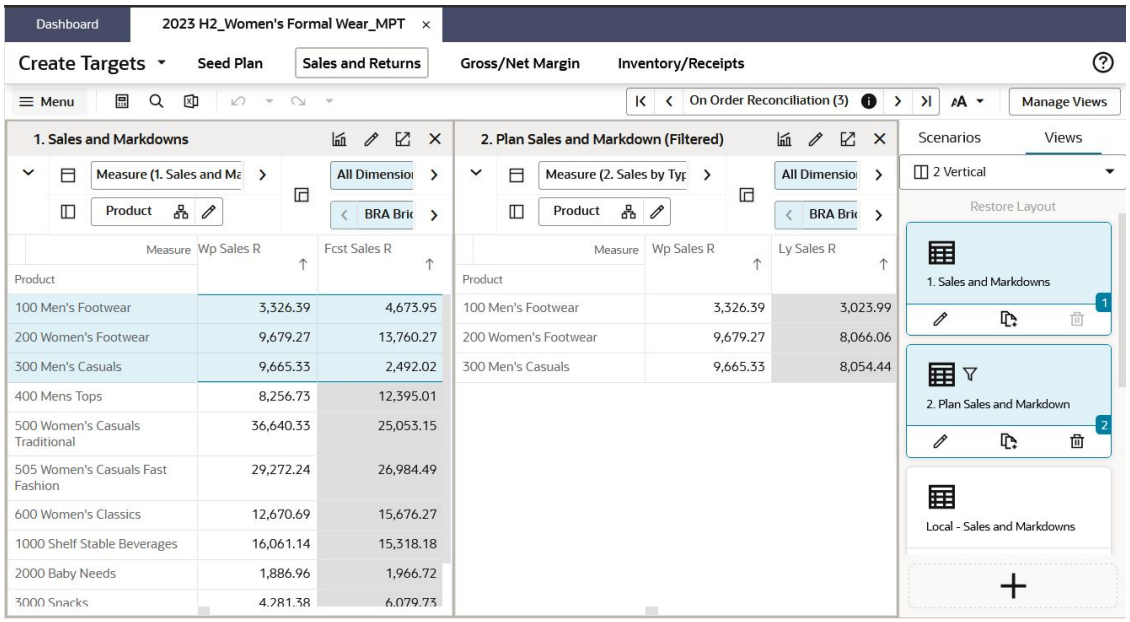
Tiling Views

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 16-8.

Figure 16-8 Tiling Views



Applying Position Filters Example

In the example shown in Figure 16-9 and Figure 16-10, 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.

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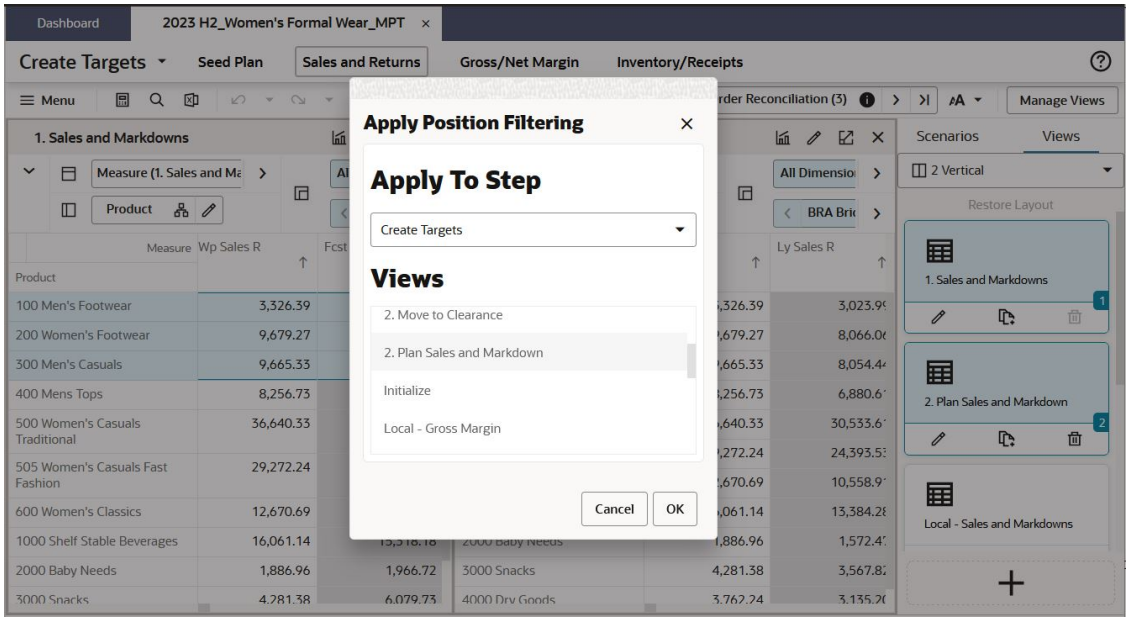
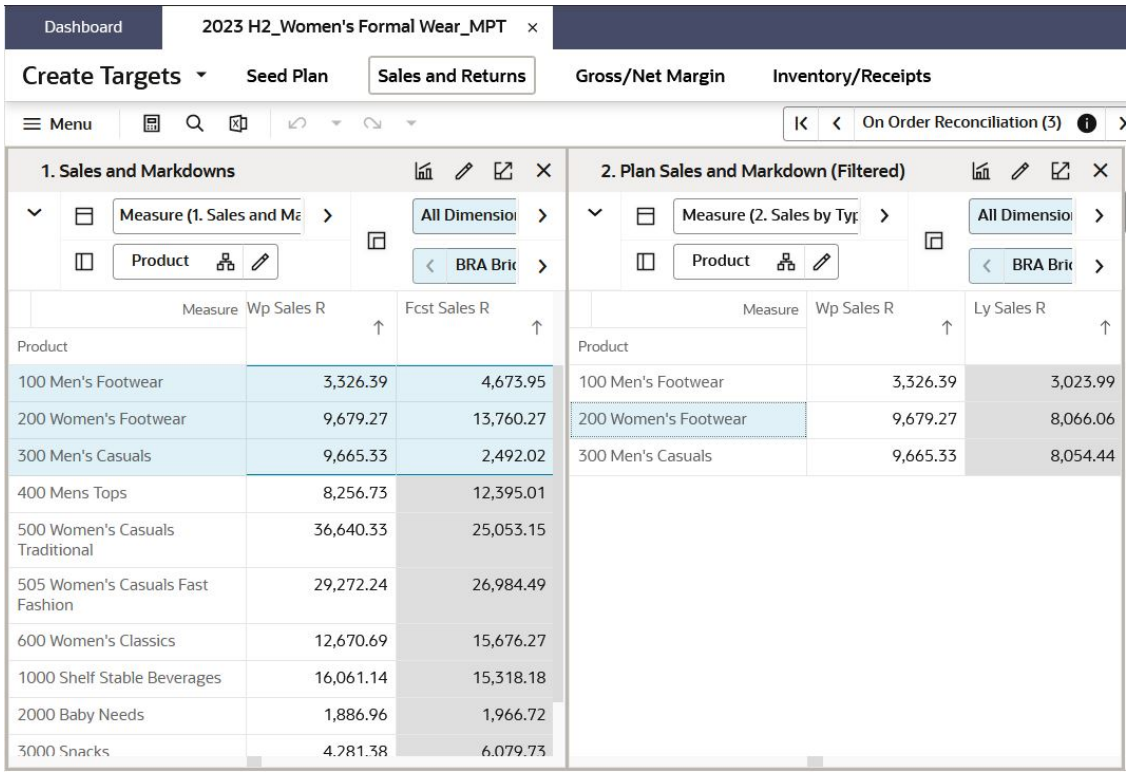
Figure 16-9 Position Filtering: Stage 1 Example



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 16-10 Position Filtering: Stage 2 Example



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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 16-9 and Figure 16-10, 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.

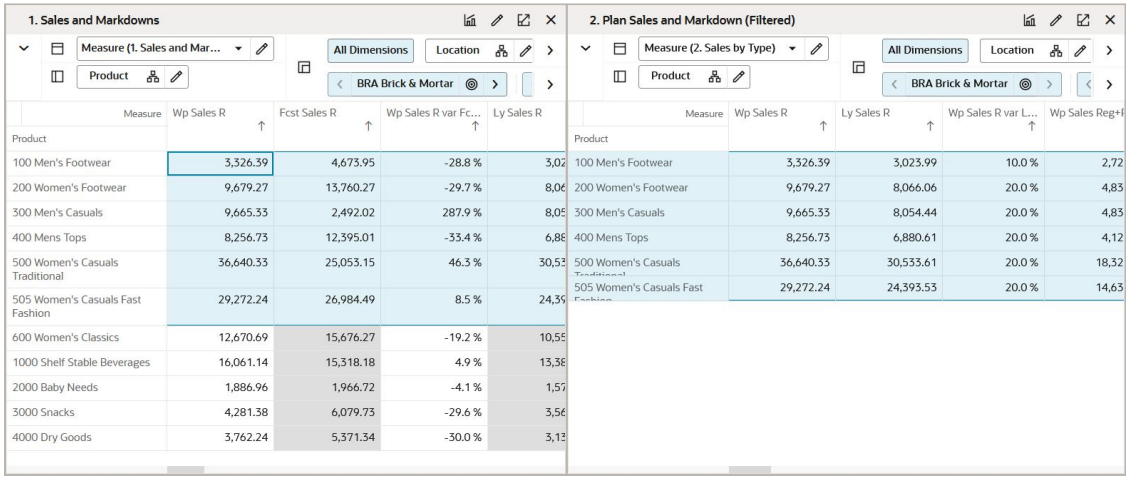
For example, you may want to isolate data restricted to a range of items covering a promotional campaign for those particular products. As the promotional campaign may increase the quantities sold over the duration of the promotion, position filtering can make it easier for you to focus on the data pertinent 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 16-11 Position Filtering: Page Edge Synchronization



In Figure 16-11, 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 16-12, the pie chart is showing data for all stores in the district of France.

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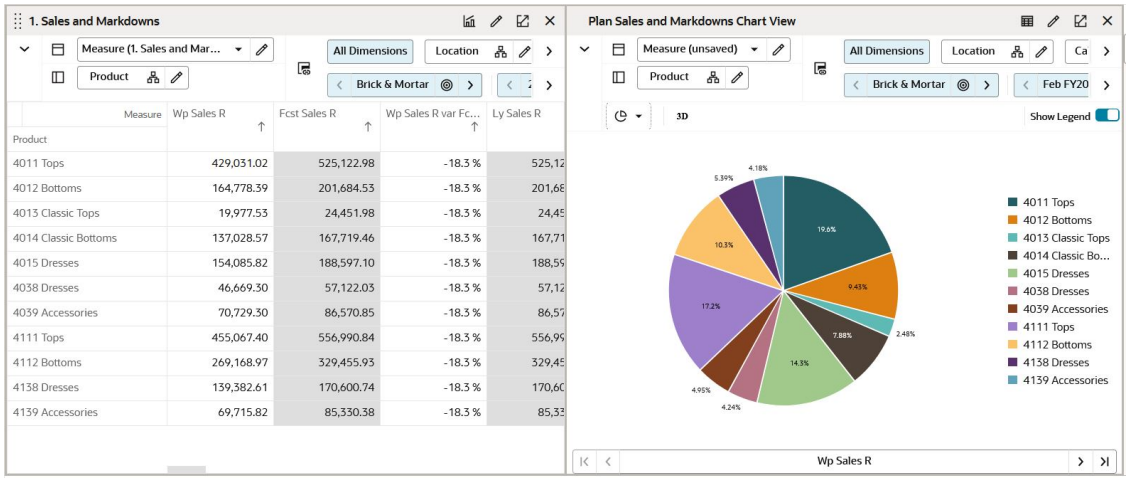
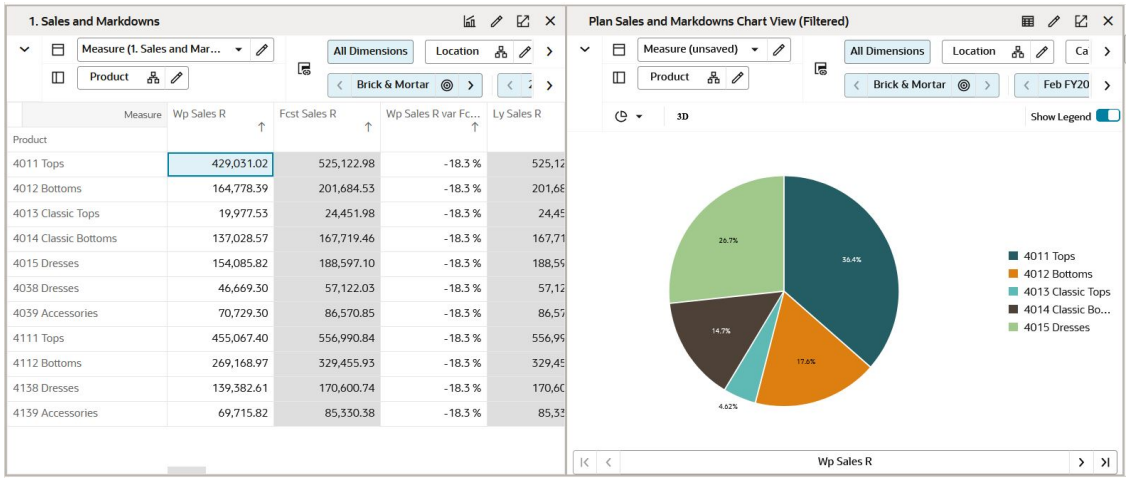
Figure 16-12 Chart Before Position Filter is Applied



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 16-13.

Figure 16-13 Chart After Position Filter is Applied



Factors Affecting the Use of Position Filters

Other RPASCE functionality can affect the use of position filters.

Position Filtering and Hidden Positions

Position filtering only operates on visible measures. In addition, if the measures are hidden when the filter is applied, they will remain hidden after the filter has been applied. In order to see which measures are hidden, open Edit View for the required dimension. The Details Tab shows which measures are visible and which are hidden, as shown in Figure 16-14.

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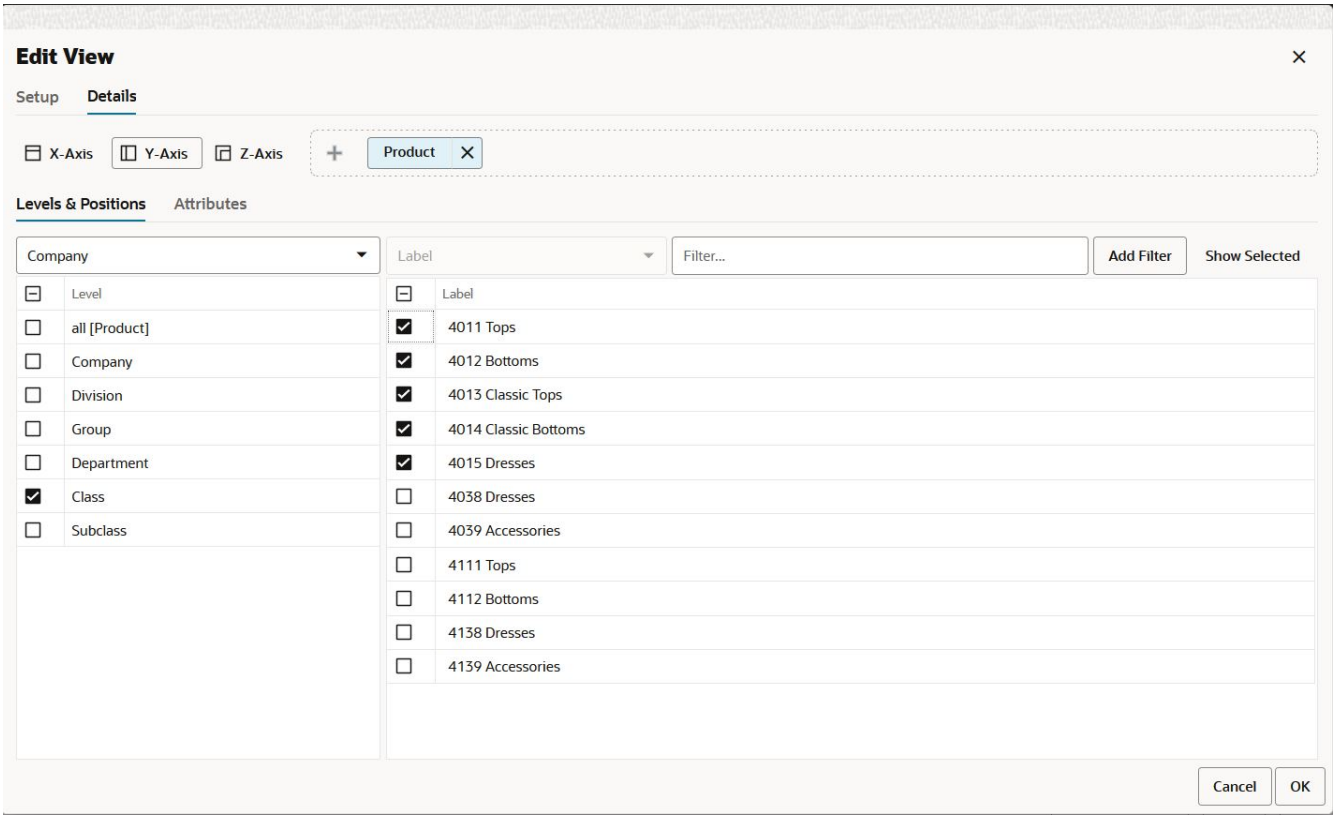
Figure 16-14 Edit View: Details Tab



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 window 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.

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Figure 16-15 Before Applying Position Filtering: All Alert Hits Visible

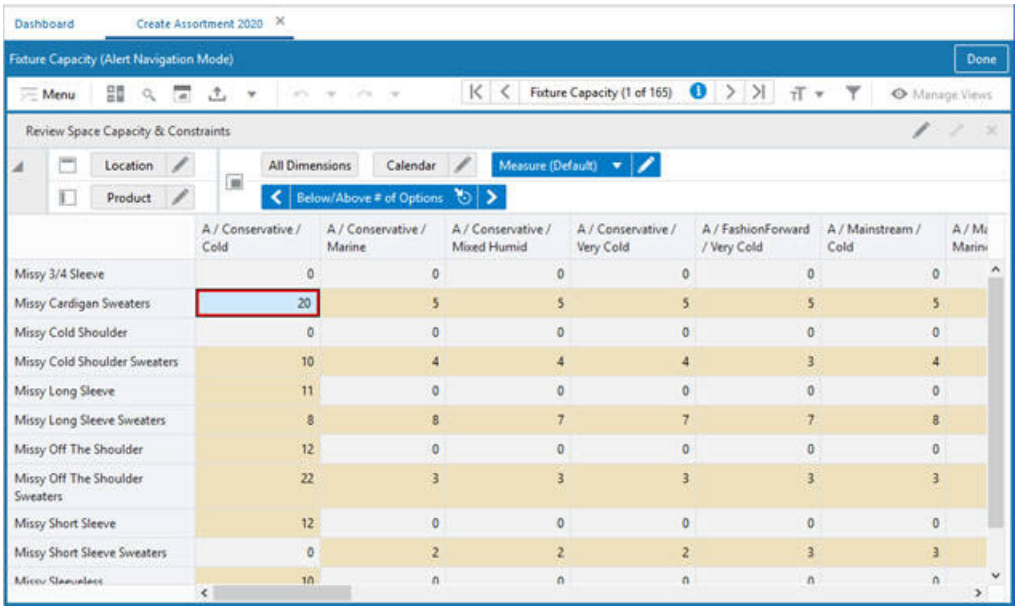
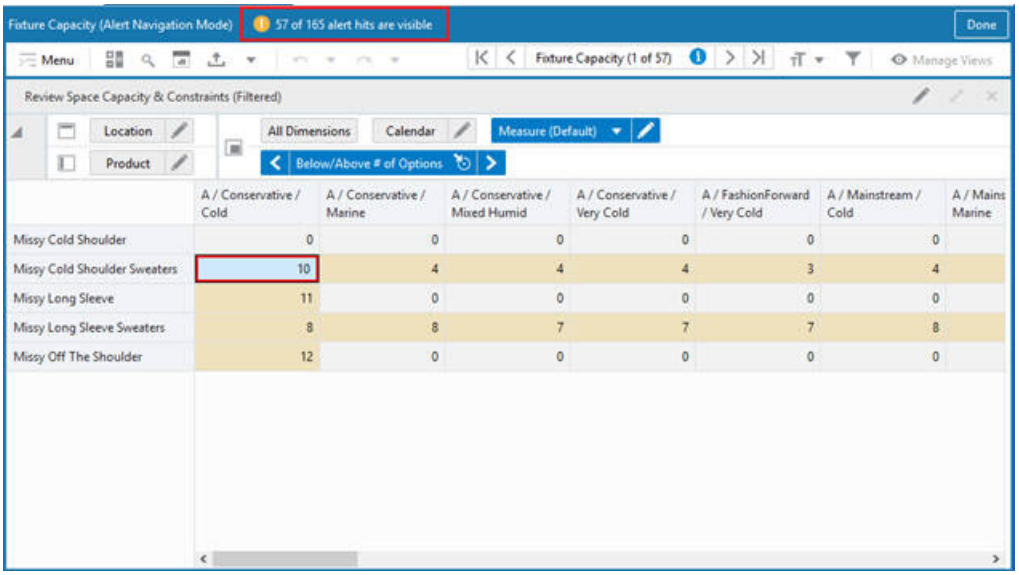


Figure 16-16 After Applying Position Filtering: Only Some Alert Hits are Visible



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.

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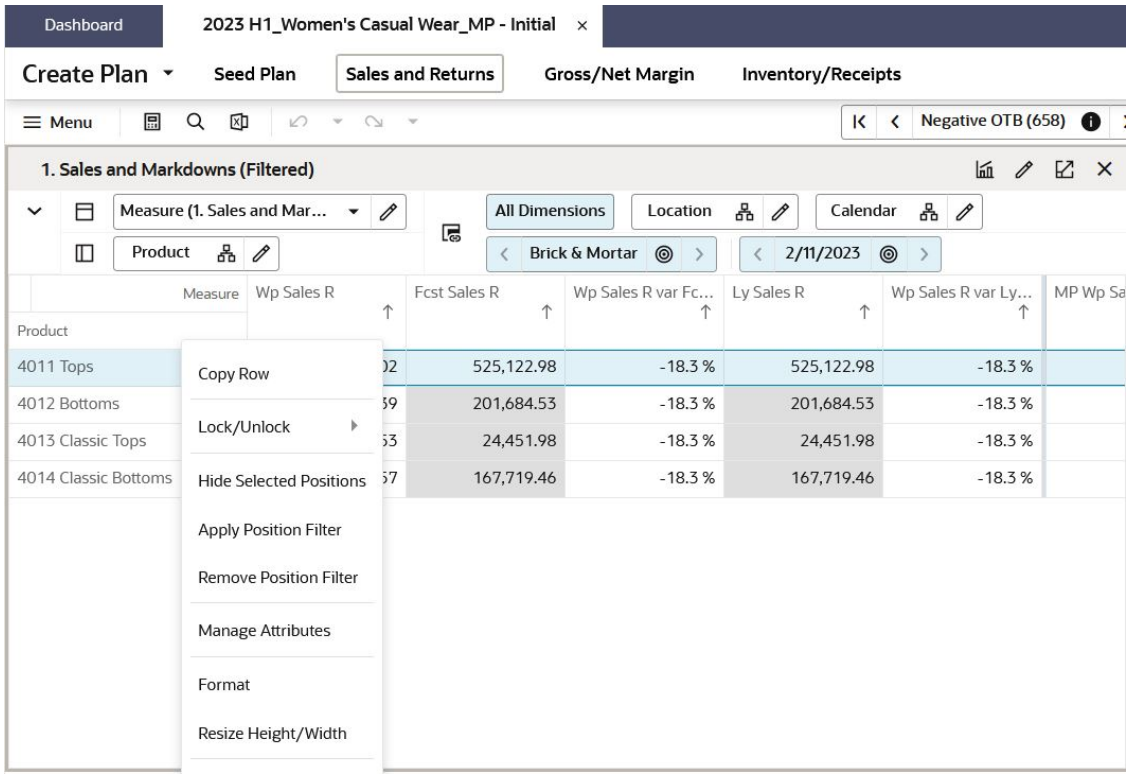
Removing Position Filters

Once applied, position filters can be removed using the Remove Filter option available from the right- click menu, as shown in Figure 16-17. This option is not available until a position filter has been applied.

If show or hide is applied from edit view over position filter results, then you cannot see the Remove position filter option.

Figure 16-17 Remove Position 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. The applied position filter is retained. In addition, the Position Filter icon on the view tile and the (filtered) text appended to the view title is visible.

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Figure 16-18 Worksheet State after Position Filter is Applied

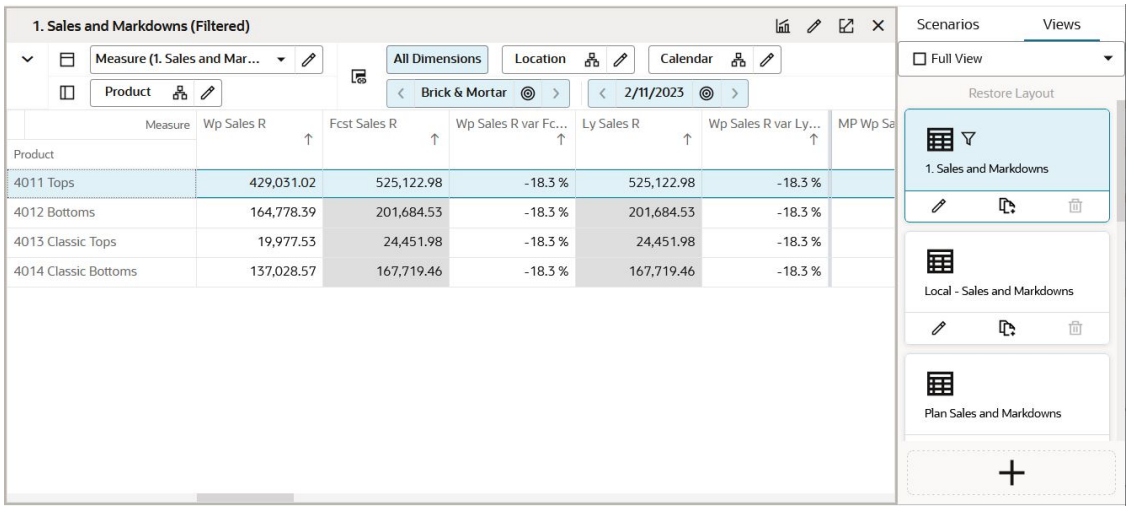
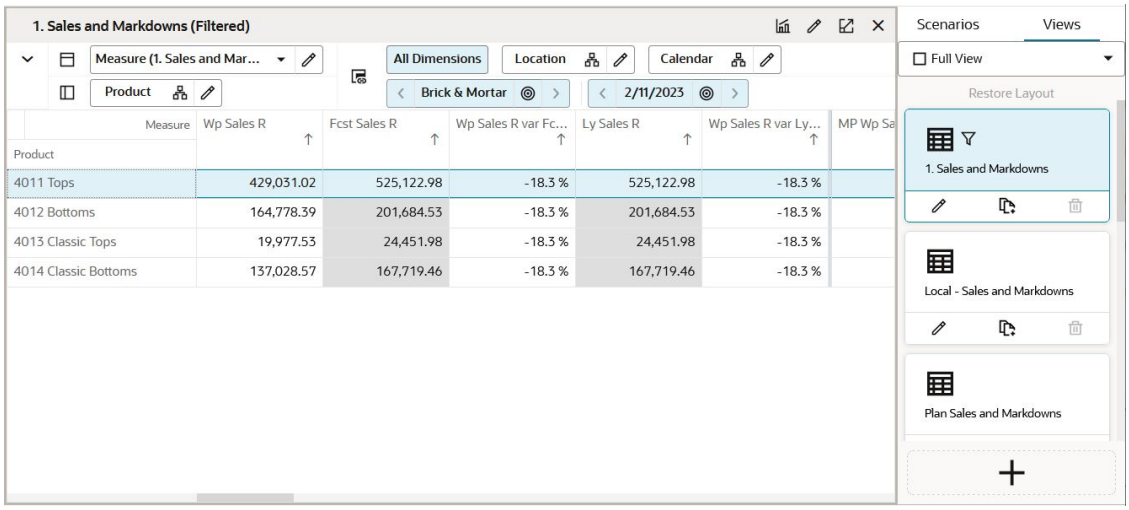


Figure 16-19 Worksheet State after Reopening the Workbook



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17

Measure Filtering

Measure filtering feature allows users to build filters on the fly letting the users narrow down the data to solve a focused set of business problems. Measure Filtering provides the ability to apply dynamic filters based on the simple math conditions which makes day to day planning process for user much easier.

For example, when you are working on in-season item planning process, to quickly filter the stores having markdown percentage greater than 25%, you can use measure filtering feature. Measure filtering allows you to create and apply ad hoc filters right from the application without configuration support.

With the flexibility of Measure Filtering, you can apply:

- Multiple measure filter on a selected view.
- Filters on measure with different data types on the selected view.
- Measure filters in combination with special filters and attribute filters.

Measure Filter Conditions

You can apply the following conditions to various measures depending on the measure data type:

- **Numeric Measures**: Greater than, Less than, equal to, greater than or equal to, less than or equal to, not equal to, between, not between, top values, bottom values,
- **Boolean Measures**: equal to
- **Date Measure**: Greater than, Less than, equal to, greater than or equal to, less than or equal to, not equal to, is between, is not between
- **String Measure**: Contains, begins with, ends with, equal to, not equal to.

Steps to Apply Filters

This section describes the basics of Measure Filtering:

- Initiating Measure Filters
- Create Measure Filters
- Add or Edit Measure Filters
- Page Edge Scrolling
- No Measure Filter Matches
- Remove Measure Filters

Initiating Measure Filters

Measure filter is accessible through the context menu when you right-click on measure column header. To apply a measure filter, ensure all the positions you have selected in wizard are

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available on the pivot table. Measure filtering is enabled when you place the measure dimension tile on x-axis and one of the position dimension tile on y-axis, with the remaining position dimension to be placed on z-axis. Measure filters function by filtering the positions of the dimension on the row axis.

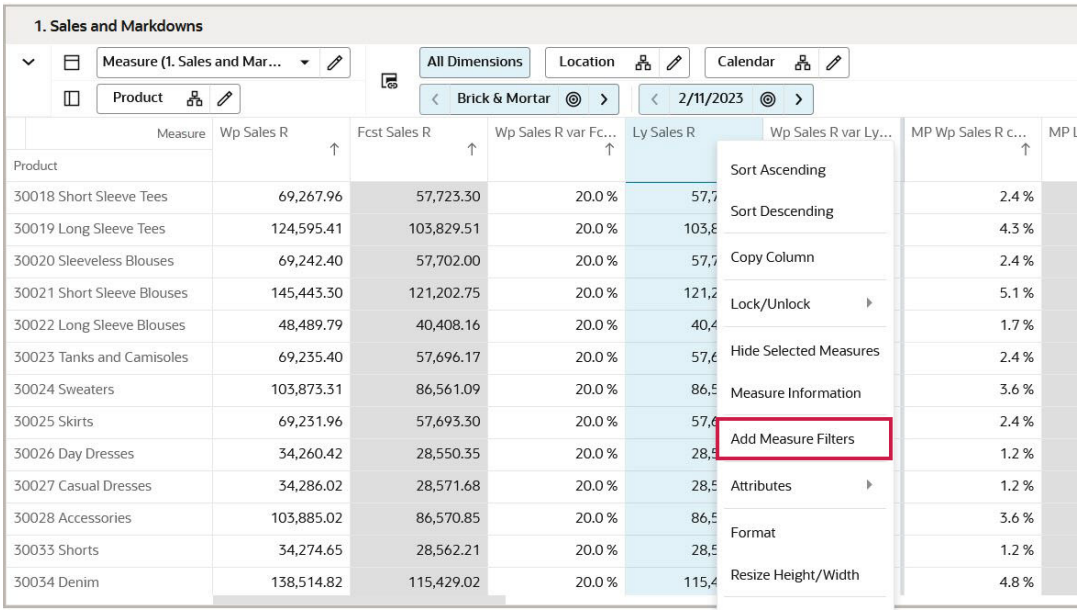
> **Note**
>
> A measure filter is applied only on the measure dimension, meaning that the measure filter option is not available on other position dimensions.
>
> After applying filters, if you move the placement of the measure dimension or position dimension then the applied filters will be reset.

Create Measure Filters

Perform the following steps to create a measure filter on the selected measure.

1. Select the measure header and then select the **Add Measure Filters** option from the right-click context menu.

Figure 17-1 Add Measure Filter



2. From the Measure filter dialog box, select **Condition** from the list and enter the value for which you need to apply a filter. The dimension and level are selected by default if you have a single level selected on the view.

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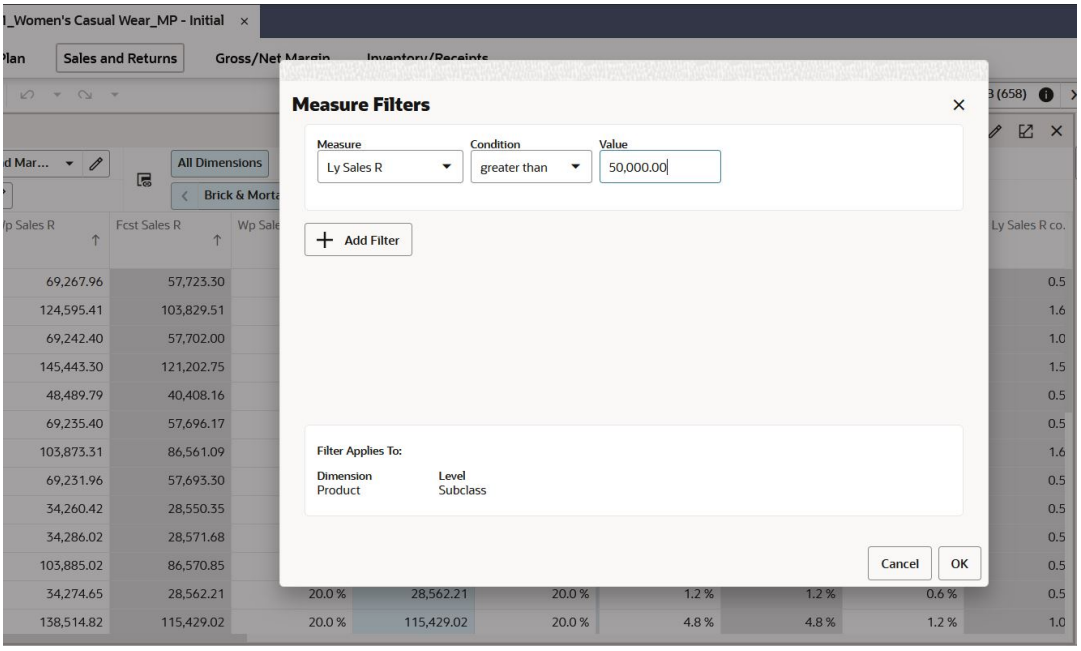
Figure 17-2 Apply Condition

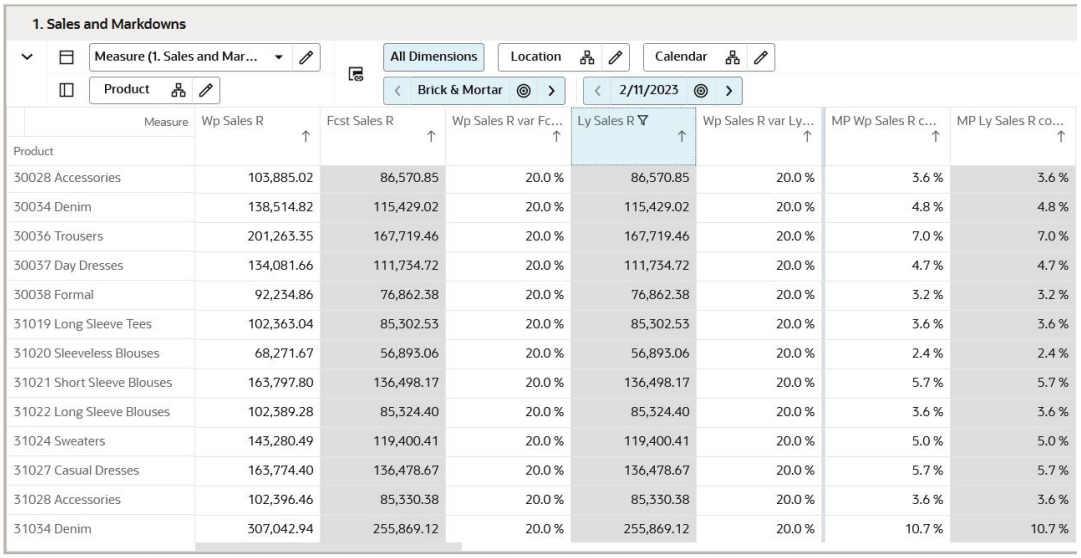


> **Note**
>
> If you have multiple levels selected for position dimension, then you can select the dimension level from the list.

3. You can see the filter results with the position matching the filter condition. In Figure 17-3, you can see the measure filter result applied on the Ly Sales R measure. The filter icon shows that the filter is applied on the measure column.

   The result shows the position where Ly Sales R is greater than 50,000.00.

Figure 17-3 Measure Filter Result



Product	Wp Sales R	Fcst Sales R	Wp Sales R var Fc...	Ly Sales R	Wp Sales R var Ly...	MP Wp Sales R c...	MP Ly Sales R co...
30028 Accessories	103,885.02	86,570.85	20.0 %	86,570.85	20.0 %	3.6 %	3.6 %
30034 Denim	138,514.82	115,429.02	20.0 %	115,429.02	20.0 %	4.8 %	4.8 %
30036 Trousers	201,263.35	167,719.46	20.0 %	167,719.46	20.0 %	7.0 %	7.0 %
30037 Day Dresses	134,081.66	111,734.72	20.0 %	111,734.72	20.0 %	4.7 %	4.7 %
30038 Formal	92,234.86	76,862.38	20.0 %	76,862.38	20.0 %	3.2 %	3.2 %
31019 Long Sleeve Tees	102,363.04	85,302.53	20.0 %	85,302.53	20.0 %	3.6 %	3.6 %
31020 Sleeveless Blouses	68,271.67	56,893.06	20.0 %	56,893.06	20.0 %	2.4 %	2.4 %
31021 Short Sleeve Blouses	163,797.80	136,498.17	20.0 %	136,498.17	20.0 %	5.7 %	5.7 %
31022 Long Sleeve Blouses	102,389.28	85,324.40	20.0 %	85,324.40	20.0 %	3.6 %	3.6 %
31024 Sweaters	143,280.49	119,400.41	20.0 %	119,400.41	20.0 %	5.0 %	5.0 %
31027 Casual Dresses	163,774.40	136,478.67	20.0 %	136,478.67	20.0 %	5.7 %	5.7 %
31028 Accessories	102,396.46	85,330.38	20.0 %	85,330.38	20.0 %	3.6 %	3.6 %
31034 Denim	307,042.94	255,869.12	20.0 %	255,869.12	20.0 %	10.7 %	10.7 %

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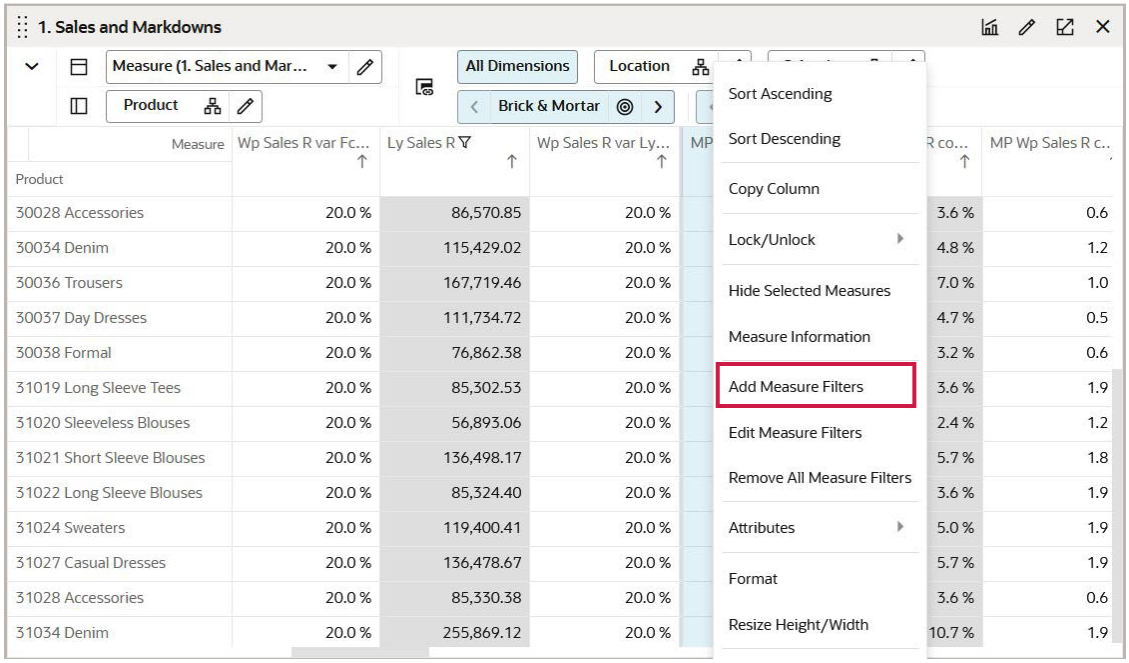
Add or Edit Measure Filters

You can apply filters on multiple measures and edit the existing measure filter. You can apply up to five measure filters on a view all at once. To apply more than one measure, use the right-click context menu option **Add Measure Filters** as shown in Figure 17-4. When two or more filters are applied, the positions matching with both the filters display as the result. To apply more than one filter, then also use **Add Filter** located on the Measure Filter dialog box as shown in Figure 17-5.

To edit the existing measure filter, select the measure on which the filter has been applied and use the right-click context menu option **Edit Measure Filters**. With the same measure filter dialog box you can edit filters as per requirement.

Figure 17-4 Add or Edit Measure Filter Options



Product	Wp Sales R var Fc...	Ly Sales R	Wp Sales R var Ly...	MP	R co...	MP Wp Sales R c...
30028 Accessories	20.0 %	86,570.85	20.0 %		3.6 %	0.6
30034 Denim	20.0 %	115,429.02	20.0 %		4.8 %	1.2
30036 Trousers	20.0 %	167,719.46	20.0 %		7.0 %	1.0
30037 Day Dresses	20.0 %	111,734.72	20.0 %		4.7 %	0.5
30038 Formal	20.0 %	76,862.38	20.0 %		3.2 %	0.6
31019 Long Sleeve Tees	20.0 %	85,302.53	20.0 %		3.6 %	1.9
31020 Sleeveless Blouses	20.0 %	56,893.06	20.0 %		2.4 %	1.2
31021 Short Sleeve Blouses	20.0 %	136,498.17	20.0 %		5.7 %	1.8
31022 Long Sleeve Blouses	20.0 %	85,324.40	20.0 %		3.6 %	1.9
31024 Sweaters	20.0 %	119,400.41	20.0 %		5.0 %	1.9
31027 Casual Dresses	20.0 %	136,478.67	20.0 %		5.7 %	1.9
31028 Accessories	20.0 %	85,330.38	20.0 %		3.6 %	0.6
31034 Denim	20.0 %	255,869.12	20.0 %		10.7 %	1.9

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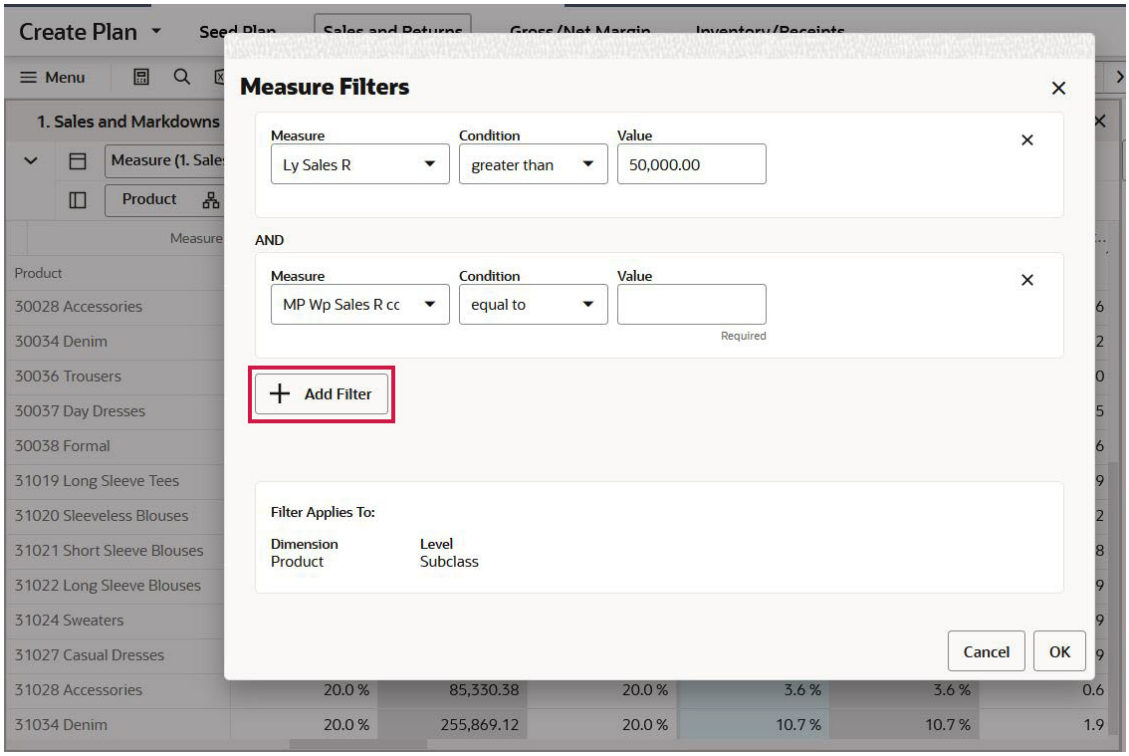
Figure 17-5 Apply More Than One Filter Using Add Filter



Note

Any measure that cannot qualify using the following rules will not have the Add Measure Filter context menu and will not be included in the condition's measure drop-down list. Also measure filtering is not applied for spacers and display only measures. For Resultant Dimension or Target level:

- The filtered measure must have the row's dimension in its intersection. Row must have at least one non-all visible level. Note that this excludes filtering on scalars.
- If the measure uses ambiguous aggregation, the target level must match the measure's base intersection.

For the driving levels on the page edge:

- If the measure's intersection does not include the dimension at all, measure filtering will work.
- If the measure uses ambiguous aggregation and its intersection does include the driving dimension, the driving level must match the measure's base intersection.

Uses ambiguous aggregation refers to a Default Agg of **ambig** or **ambig_pop** in the measure configuration.

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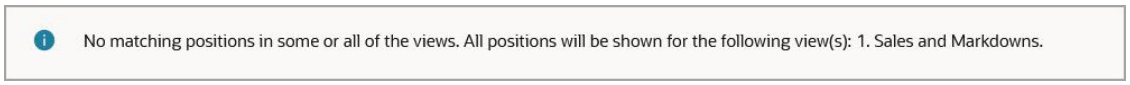
Page Edge Scrolling

When a measure filter is applied, the information in the page edge is also filtered. When you scroll on position dimension on page edge, the measure filter is applied and displays the filtered results.

No Measure Filter Matches

If you apply a measure filter and no position meets the requirements of the measure filter, then all positions in the view are displayed and a notification displays the message, *No matching positions in some or all of the views. All positions will be shown for the view(s):* list of views.

Figure 17-6 Notification for No Matching Positions

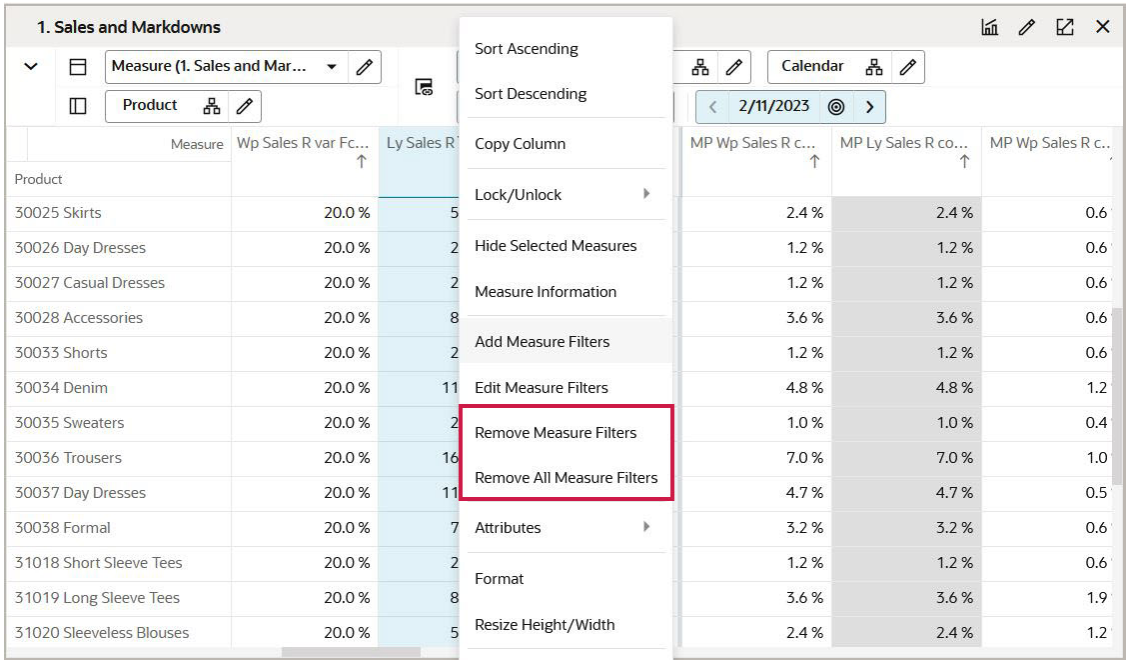


Remove Measure Filters

You can remove the applied measure filter using the right-click context menu option, **Remove Measure Filters**. When you remove the measure filter, all of the positions display on the pivot table.

You can remove multiple filters one by one from each measure. You can also use the **Remove All Measure Filters** option to remove all the filters from the view. When a measure filter is removed, a notification displays on the screen.

Figure 17-7 Remove Measure Filters and Remove All Measure Filters



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Factors Affecting the Use of Measure Filters

The following RPASCE functionality can affect the use of Measure Filters:

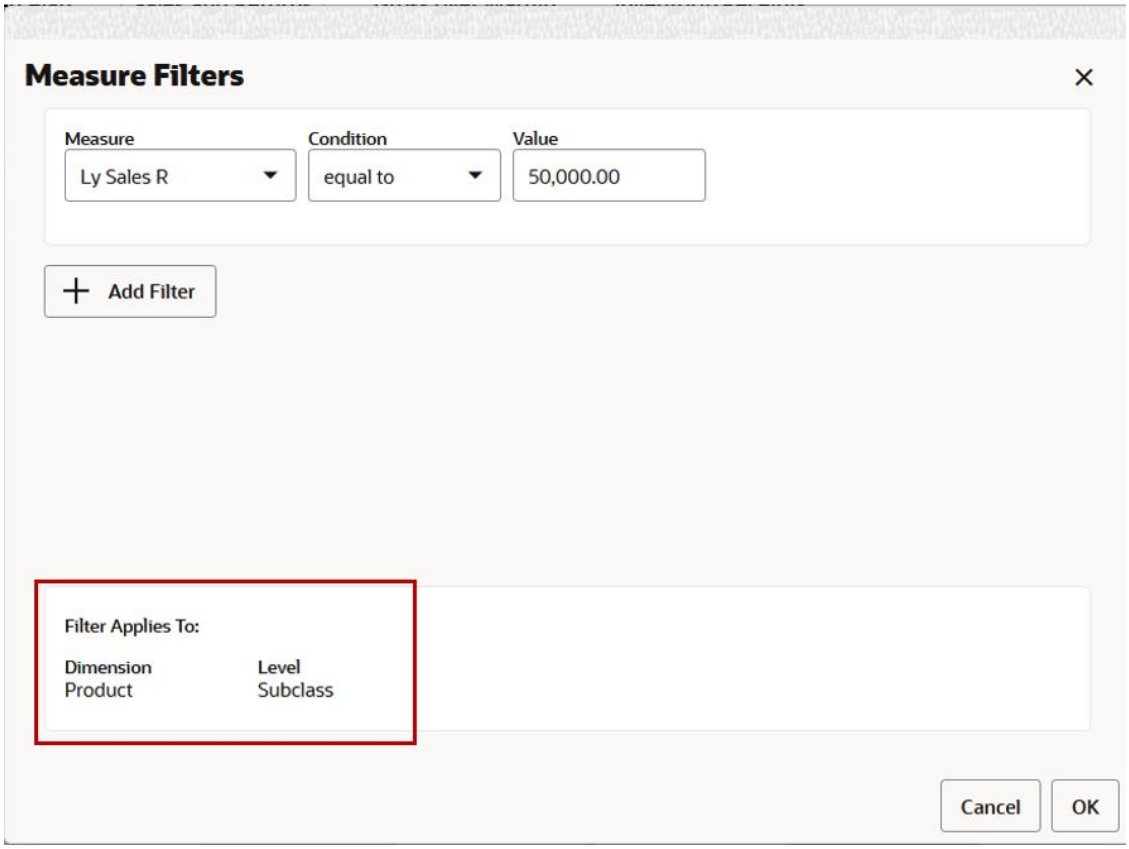
- Measure Filters and Dimensions
- Measure Filters and Hidden Positions
- Measure Filters and Cell Editing
- Measure Filters and Placeholder Positions

Measure Filters and Dimensions

The dimension at which the filter is applied should be on the row or y-axis. The dimension and level should be selected at the time when you create the measure filter to apply the filter.

> **Note**
>
> When you have a single position level displayed on pivot table, the selection is made by default on the Measure Filter dialog box.

Figure 17-8 Apply Measure Filter to Dimension and Level



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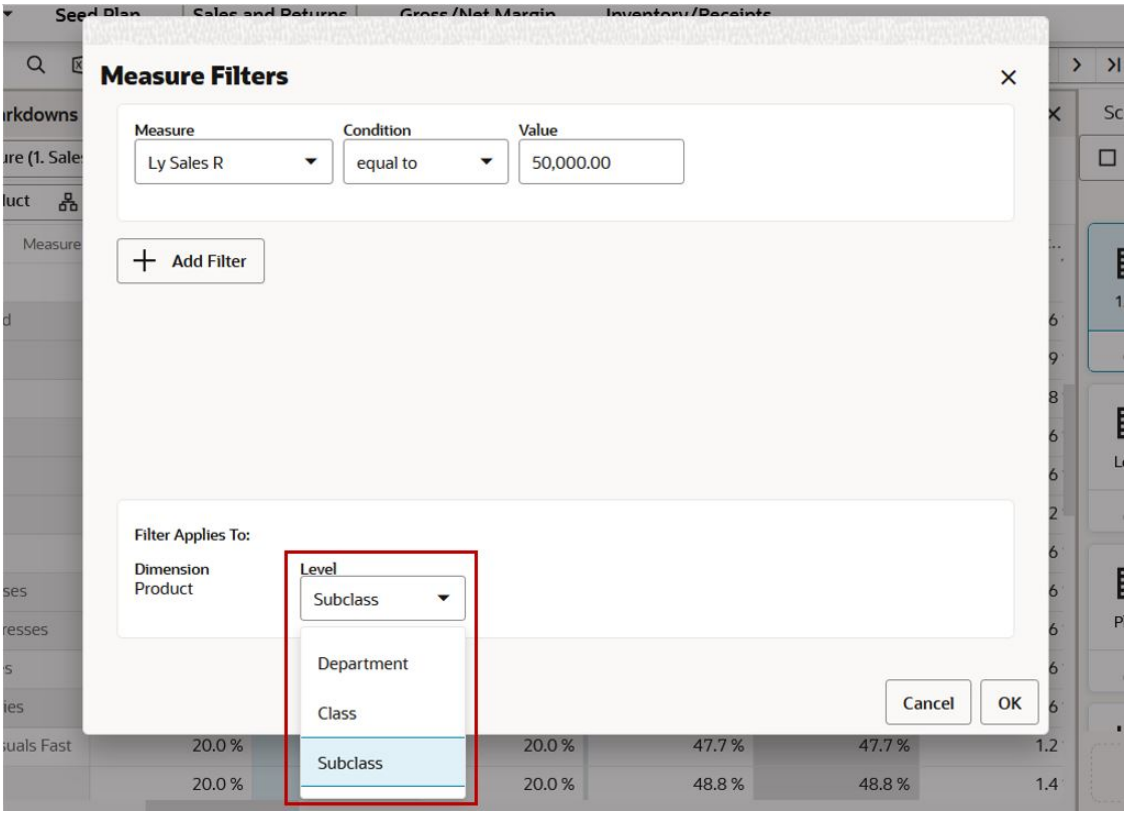
When multiple position levels are displayed on the y-axis dimension, then you need to make a selection of the level when the measure filter was created. Based on the level selected, the measure filter is applied. If you apply the filter at the parent level, then results show the matching parent positions along with all the children. If you apply the filter to the base or child level, then results show the matching child positions along with respective parent positions.

Example:

If you are filtering the product dimension tile and on y-axis with the sub-class and SKU displayed, then while creating the filter you can make a selection to either apply the filter on the sub-class or SKU's positions.

If you apply the filter on Sub-class level, the position matching the filter criteria at sub-class level displays as the result. If you apply the filter to the SKU level, then the position matching the filter criteria at SKU level displays as the result.

Figure 17-9 Select Dimension Level



Measure Filters and Hidden Positions

Measure filtering operates on all the positions selected by you in the wizard. In addition, if the positions are hidden when the filter is applied, they display if they match the applied filter criteria.

If you apply a manual show or hide from the Edit View on the measure filter result, then the measure filter is removed. In order to see the position selections, you can open the Edit view for the required positions.

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Measure Filters and Cell Editing

When you make cell edits on the measures where filters are applied, the filters are re-run with **Calculate**. The cell edits the measures where the filters are not applied and makes no change with **Calculate**.

Measure Filters and Placeholder Positions

You can add placeholder positions when there is measure filter applied. The placeholder positions are added along with the resulting positions of the measure filter. Once you run actions like **Calculate** or **Page scroll**, then the placeholder positions may not display based on the measure filter criteria.

Combination of Various Filters

RPASCE offers various filters such as Special Filter, Attribute filters, and Position Filter. This section describes using the combination of Measure Filter with these other RPASCE filters:

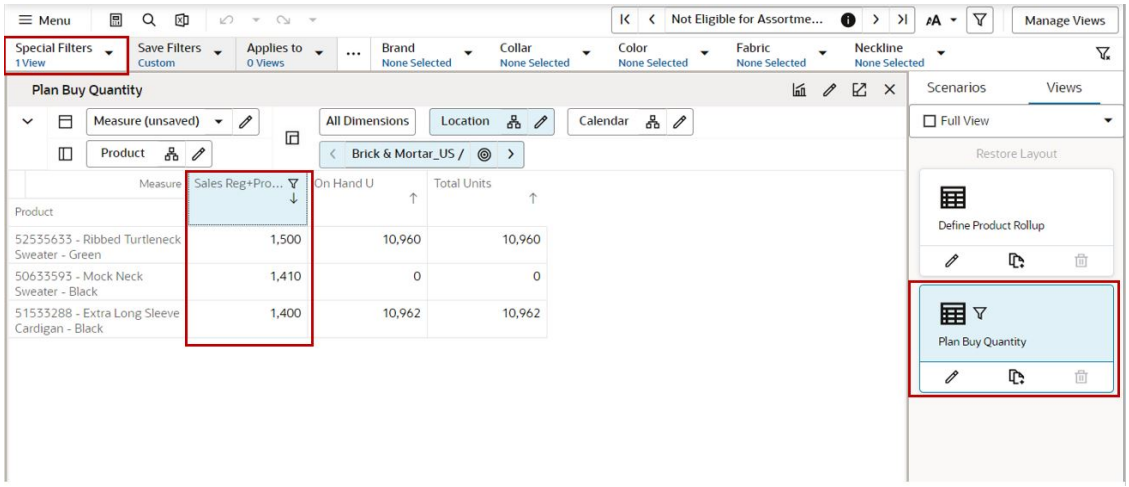
- Measure Filters and Special Filters
- Measure Filters and Attribute Filters
- Measure Filters and Position Filters

Measure Filters and Special Filters

During the planning process, there are views where you need to apply special filters. Along with special filters you can apply a measure filter to further narrow down the data to perform analysis and make quick decisions. Special filters takes precedence over a measure filter.

When you apply a measure filter over special filter you can see the position matching with measure filter and special filter criteria. Figure 17-10 shows the combination of special filter (**Filter by Assorted Items**) and a measure filter (**Sales Reg+Promo R less than and equal to 1500**).

Figure 17-10 Special Filters and Measure Filters



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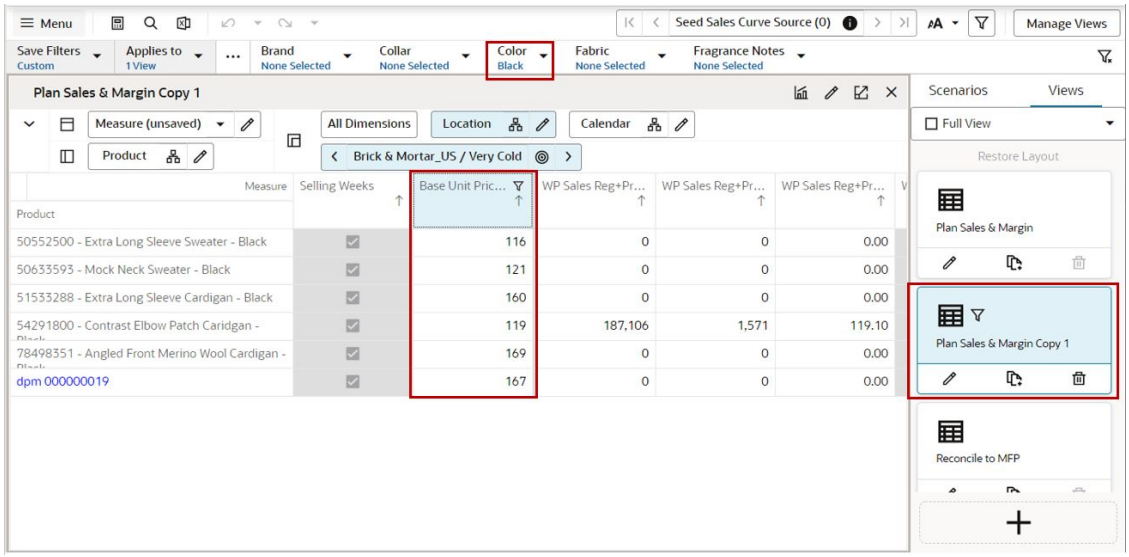
Notes:

- Applying a special filter over a measure filter removes the measure filter and only resulting positions of the special filter are displayed on the screen.
- When a special filter is applied along with a measure filter and the special filter is out of sync, then the removal of the measure filter reverts to the special filter results.
- When a special filter is applied along with a measure filter, then the page edge scroll shows the resulting positions of the combination of two filters.
- If you remove a special filter out of the combination of special filters and measure filters, then the results of the measure filter displays.

Measure Filters and Attribute Filters

You can apply measure filters along with attribute filters which helps you focus on a sub-set of data in the planning process. You can apply attribute filters and measure filter on top of each other as per your requirements. For example, you can filter Product SKUs for a brand and then apply a measure filter to products that have sales whose cost is greater than and equal to 7,000. A combination of measure filtering and attribute filters provides multiple options to place emphasis on a smaller data set during planning. Figure 17-11 shows an example of using a combination of attribute filters and measure filters.

Figure 17-11 Attribute Filters and Measure Filters



Measure Filters and Position Filters

Apply a measure filter with a position filter to the view of a pivot table. You can apply a position filter over a measure filter to the view to bring down the number of positions and concentrate on the subsection of data. When you apply a measure filter over the position filter, then the position filter is removed and the measure filter is applied over all of the available positions.

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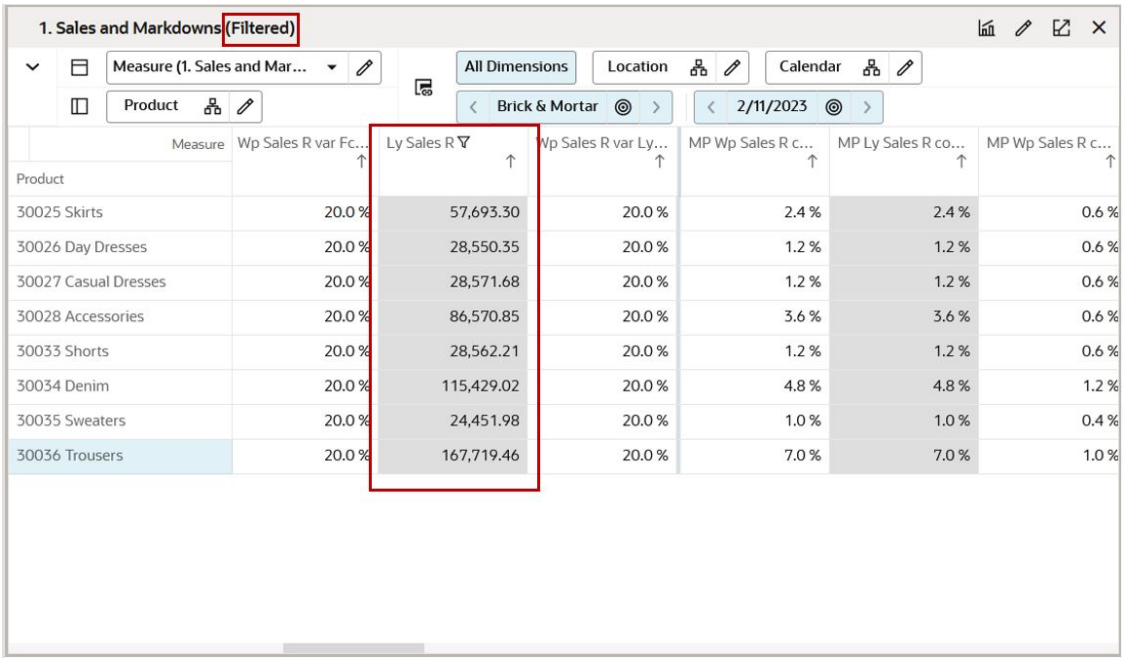
Figure 17-12 Position Filter Applied Over a Measure Filter



Product	Measure: Wp Sales R var Fc...	Ly Sales R	Wp Sales R var Ly...	MP Wp Sales R c...	MP Ly Sales R co...	MP Wp Sales R c...
30025 Skirts	20.0 %	57,693.30	20.0 %	2.4 %	2.4 %	0.6 %
30026 Day Dresses	20.0 %	28,550.35	20.0 %	1.2 %	1.2 %	0.6 %
30027 Casual Dresses	20.0 %	28,571.68	20.0 %	1.2 %	1.2 %	0.6 %
30028 Accessories	20.0 %	86,570.85	20.0 %	3.6 %	3.6 %	0.6 %
30033 Shorts	20.0 %	28,562.21	20.0 %	1.2 %	1.2 %	0.6 %
30034 Denim	20.0 %	115,429.02	20.0 %	4.8 %	4.8 %	1.2 %
30035 Sweaters	20.0 %	24,451.98	20.0 %	1.0 %	1.0 %	0.4 %
30036 Trousers	20.0 %	167,719.46	20.0 %	7.0 %	7.0 %	1.0 %

Note:

Ordering of various filters combination is as follows:

- Special filters takes precedence over all of the filters.
- The measure filter and attribute filters are applied over special filter with **AND** operators.
- Position filtering overrides all other filters, as a temporary state that can be lifted with right-click context menu option, **Remove Position Filter**.

Copying and Saving Measure Filters

When workbooks are copied or saved with measure filtering applied, then the following rules apply:

Copying View

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

Closing Workbooks

When the workbook is closed and reopened, it opens in the same state with measure filtering as it was closed in. The applied measure filter is retained and the respective measure displays the measure filter icon.

Saving with Format

A measure filter is saved with formats. You can save the measure filters with these Save Format options:

- Only for Me

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- For my Group
- Workspace Template

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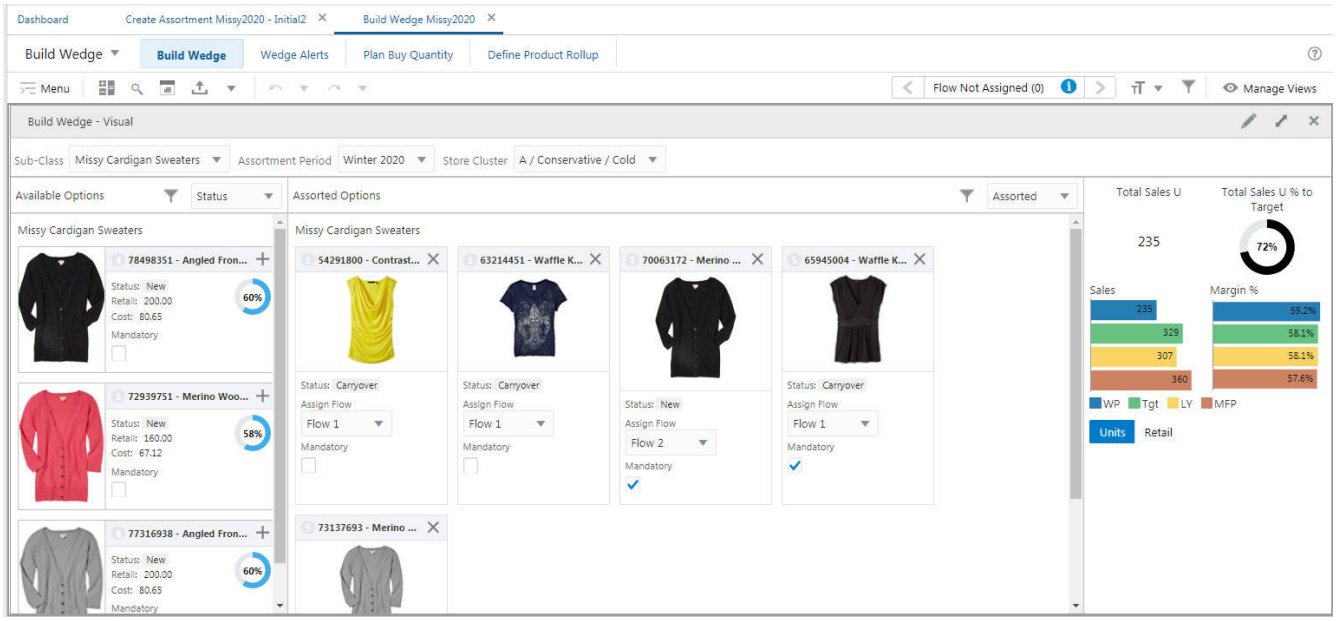
18
Visual Planning

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.

In Assortment Planning, Visual Planning is supported with a specific type of view using the Cards Add and Remove functionality shown in Figure 18-1.

Figure 18-1 Cards Add and Remove



You 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 Options and Assorted Options views are side by side with some of the key measures configured from the application.

The Available and Assorted Options view is an aggregated view that contains the four labeled sections shown in Figure 18-2. These four sections are described in this chapter.

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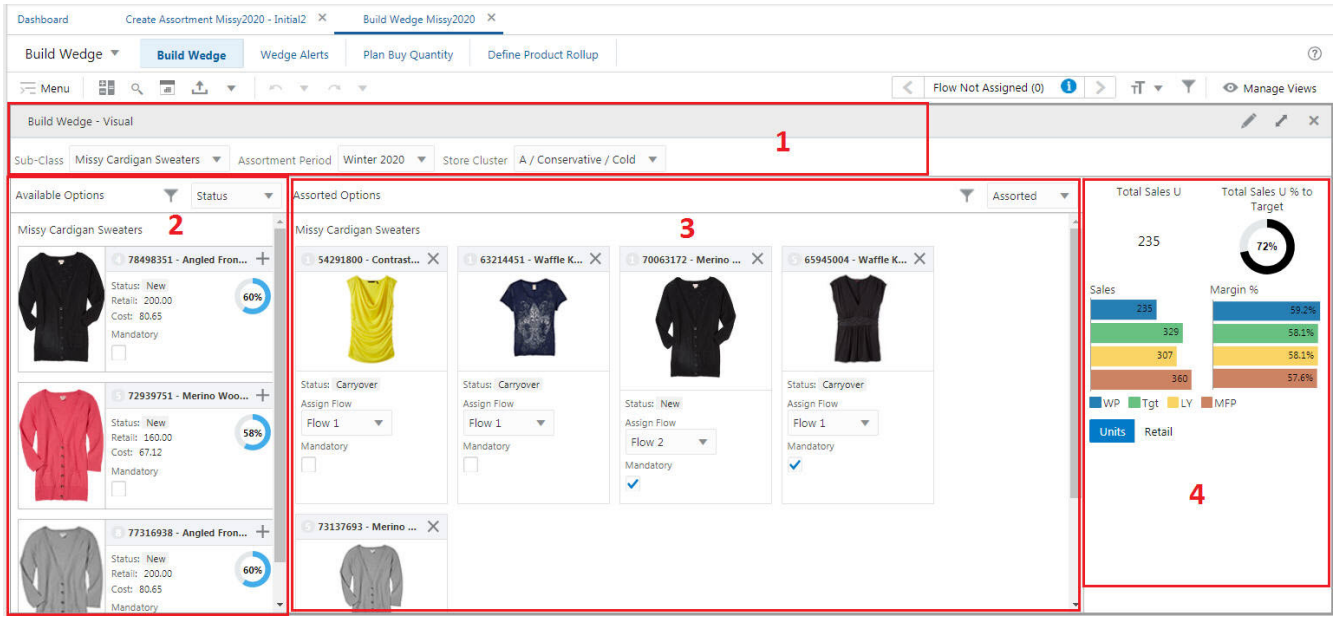
Figure 18-2 Aggregated View: Available and Assorted Styles View



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 18-2, 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 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.

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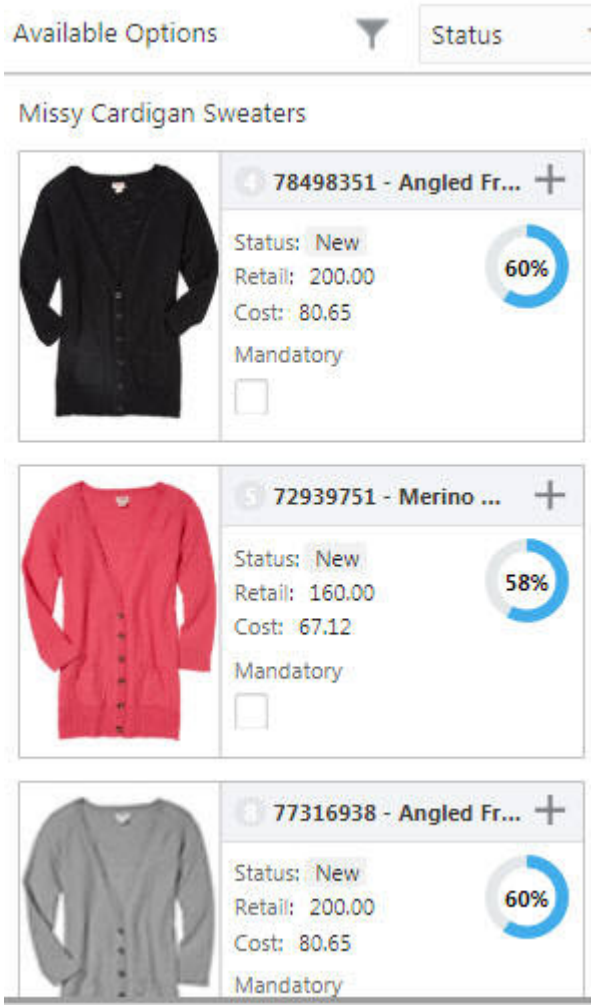
Figure 18-3 Available Options



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.

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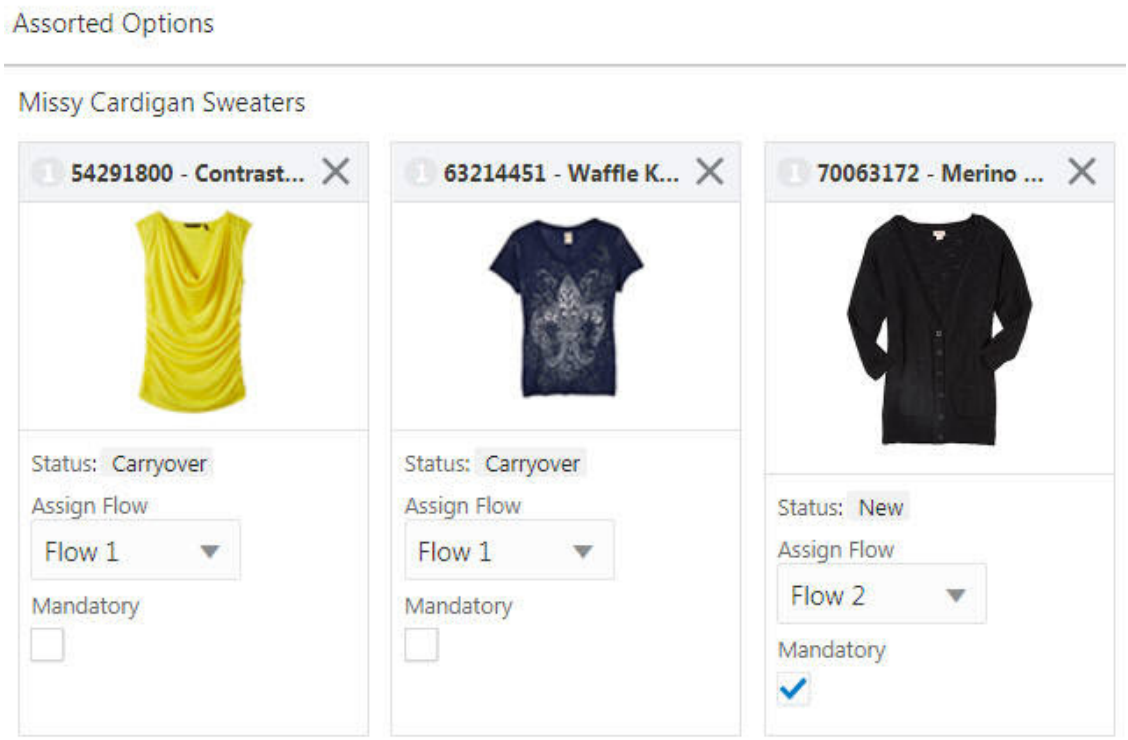
Figure 18-4 Assorted Options



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.

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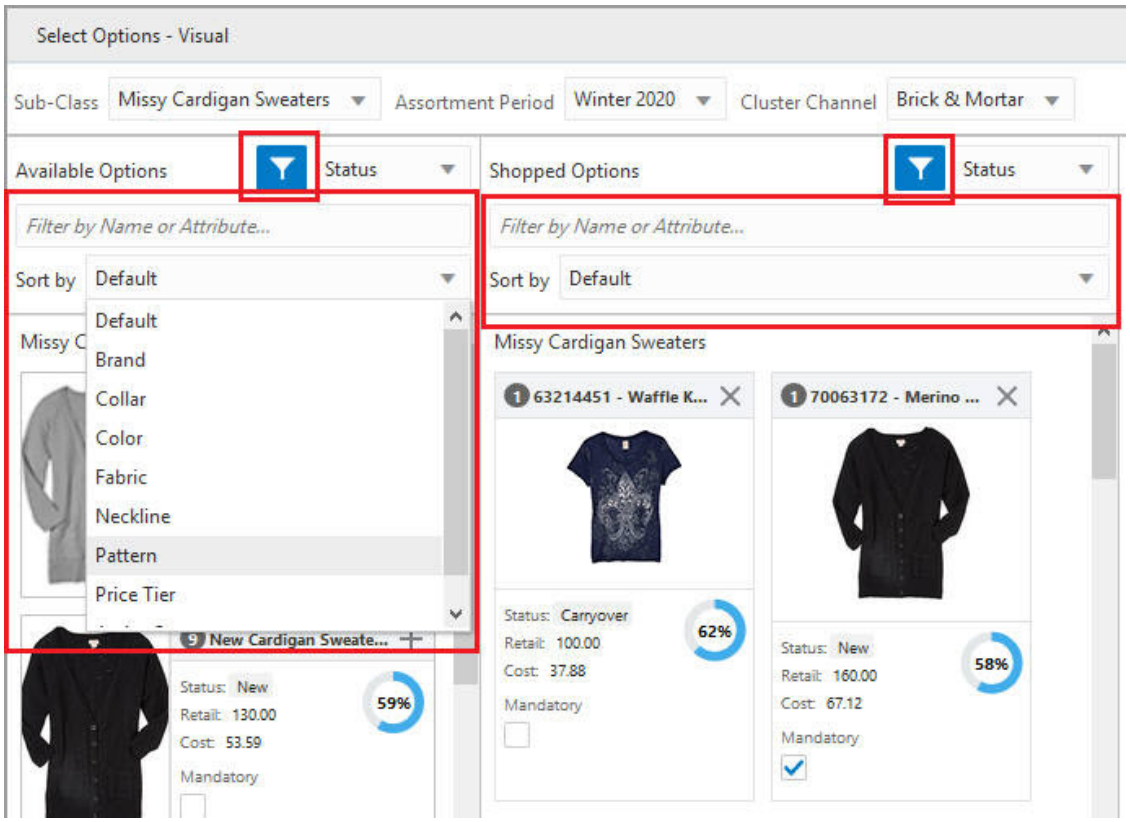
Filtering and Sorting Cards by Attribute

This section describes filtering and sorting cards.

Figure 18-5 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 18-6 Filter Cards by Attribute

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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 the 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

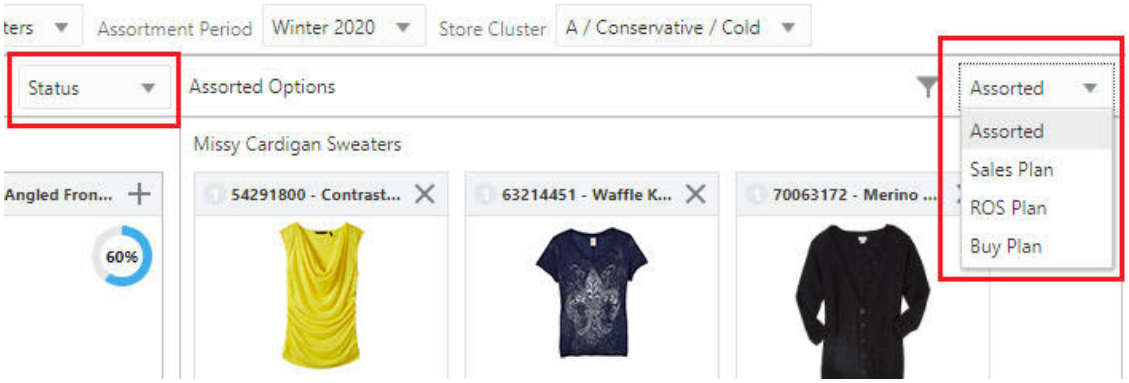
You can sort the cards by attribute in the container view to organize your available options as well as see the makeup of your assortment for each style/subclass for different attribute values.

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 18-7 Select Card Definition



The service implementer 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 is not available.

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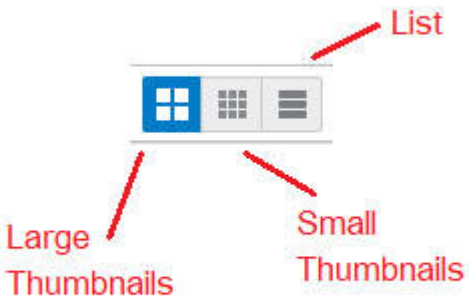
If more than one size (small, large, list) of card is available for the selected card definition, you will see icons that let you choose the size of cards. Typically, only list is used for the available options and only small and large thumbnails for the shopped and assorted options.

Figure 18-8 Card Sizes



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19

Special Features

This chapter describes special RPASCE features that you can use.

- What-If Scenarios
- Images
- Extended Measures
- User Preference Module
- Import Data Using Microsoft Excel

What-If Scenarios

What-if scenarios provide functionality for a user to create strategic planning options while keeping the original scenario intact. These are additional plan versions that are created to simulate outcomes with different inputs. You use What-if scenarios to maintain and re-forecast the primary plan while preparing a stretch plan to quickly react to upward trends or more aggressive business growth targets.

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

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

Working with What-If Scenarios

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

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

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

Figure 19-1 illustrates the main scenario and the green icon that identifies it.

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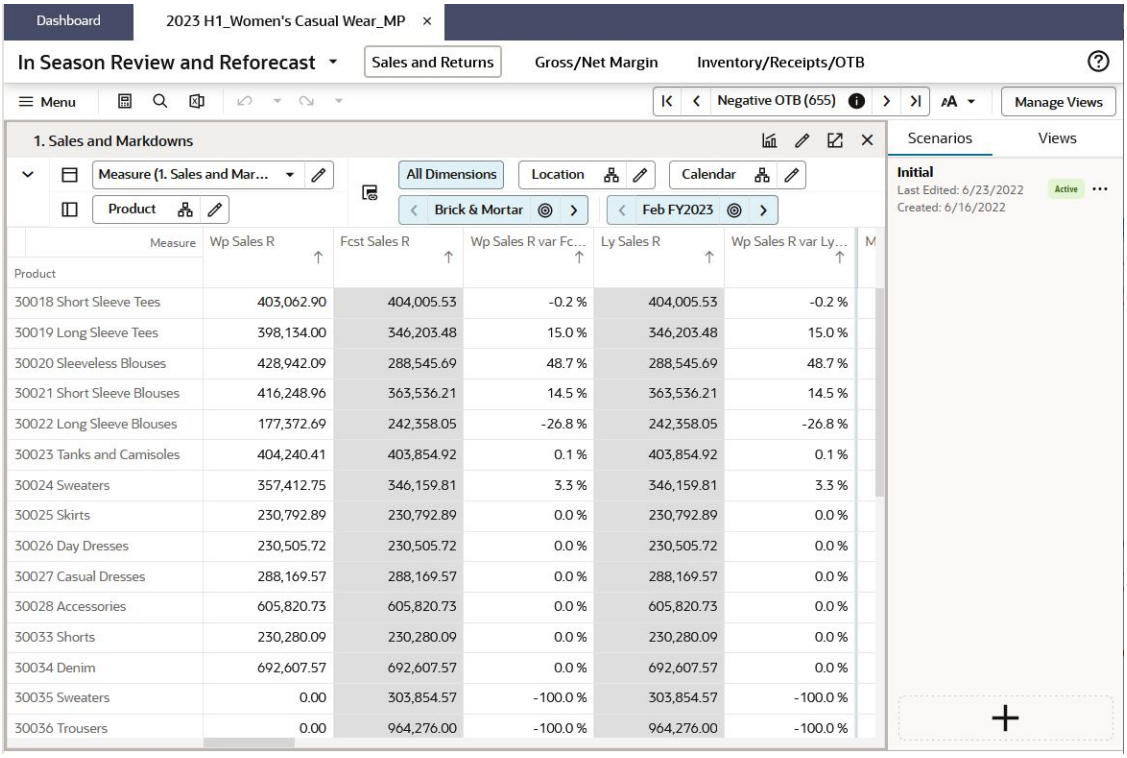
Figure 19-1 Master Scenario



You cannot delete the master scenario. As both the **Open** and **Open in New Tab** options are enabled, click either to access the opened plan. You can either duplicate the scenario to create another scenario or rename the scenario.

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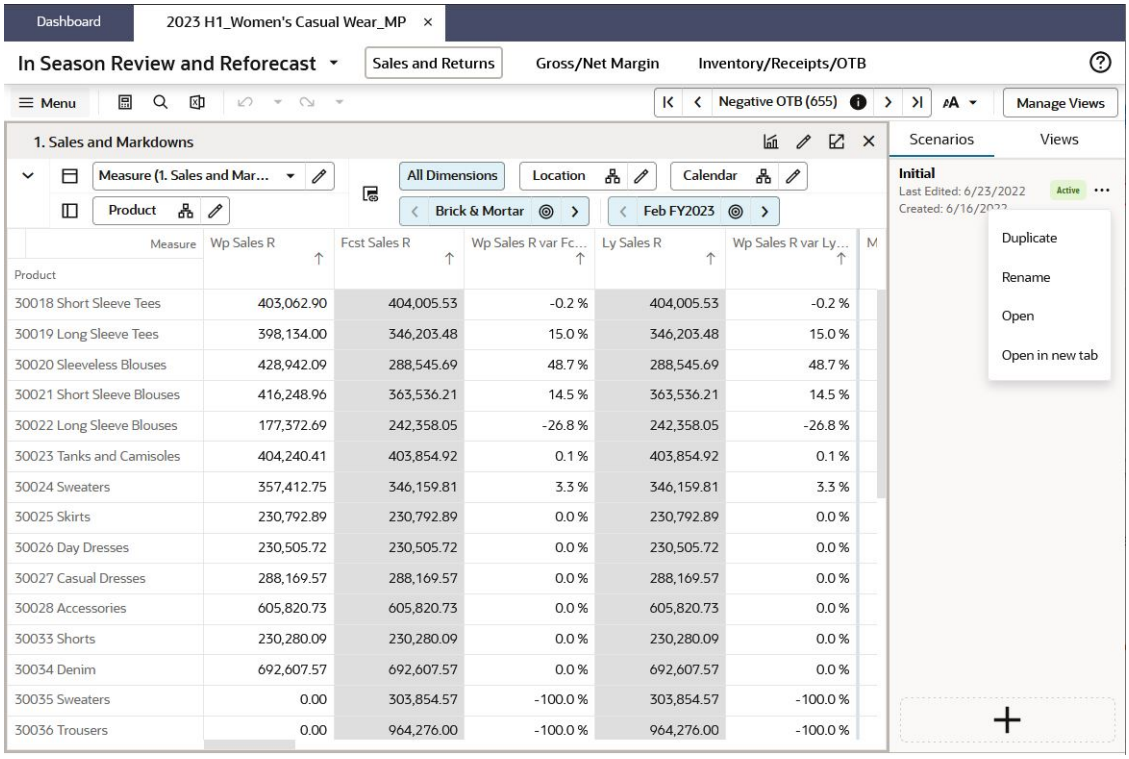
Figure 19-2 Duplicate Scenario



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

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. **Calculate** (F9) and **Promote Scenario** action items are visible in newly created scenario.

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Figure 19-3 Master Scenario Identification

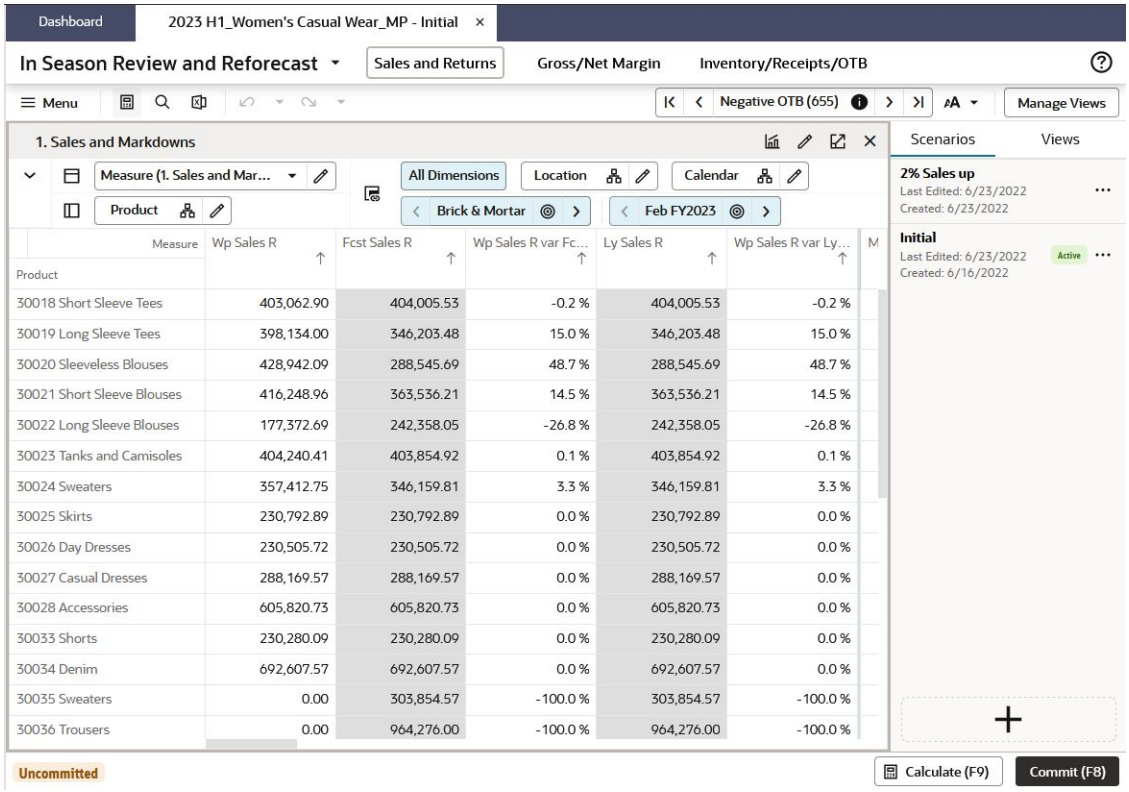
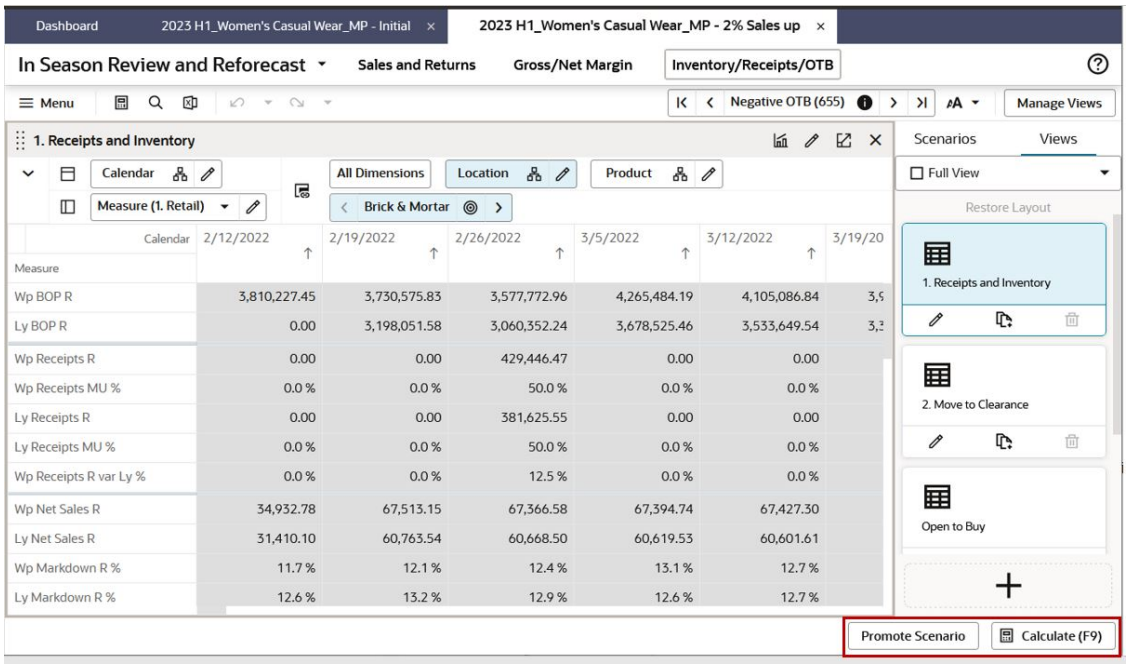


Figure 19-4 What-If Scenario



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

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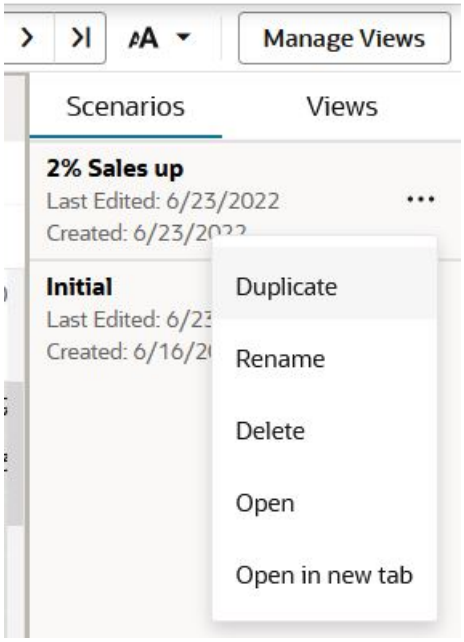
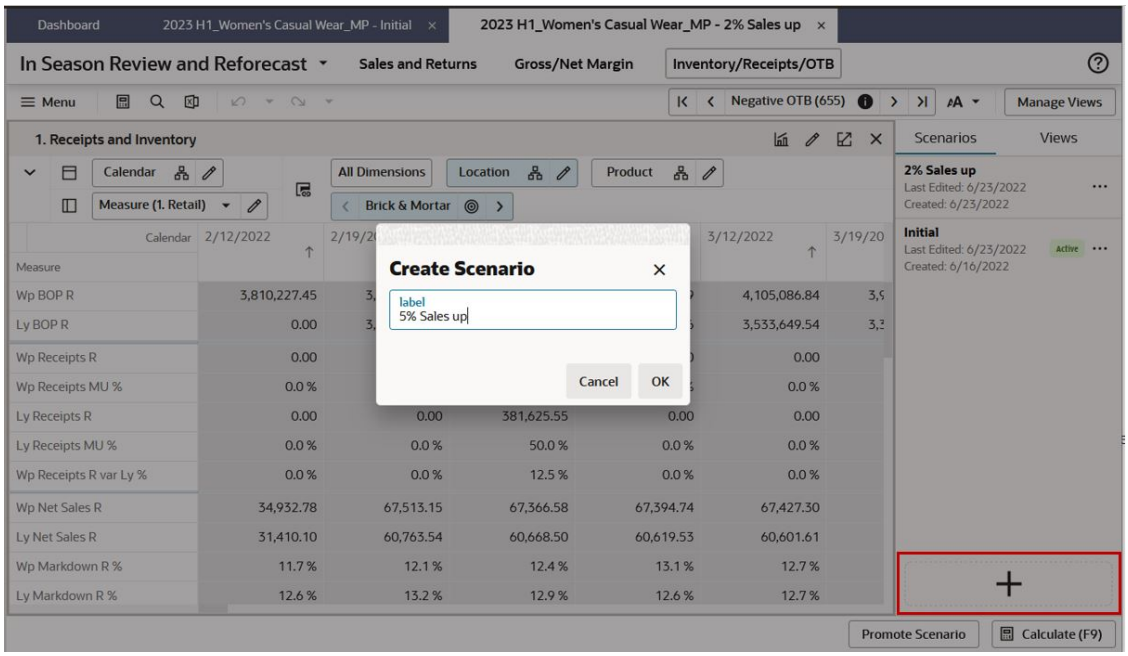
browser window), and Open in new tab (to open the scenario in new browser tab window) are shown in Figure 19-5.

Figure 19-5 Actions Performed on a Scenario



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

Figure 19-6 Create Scenario



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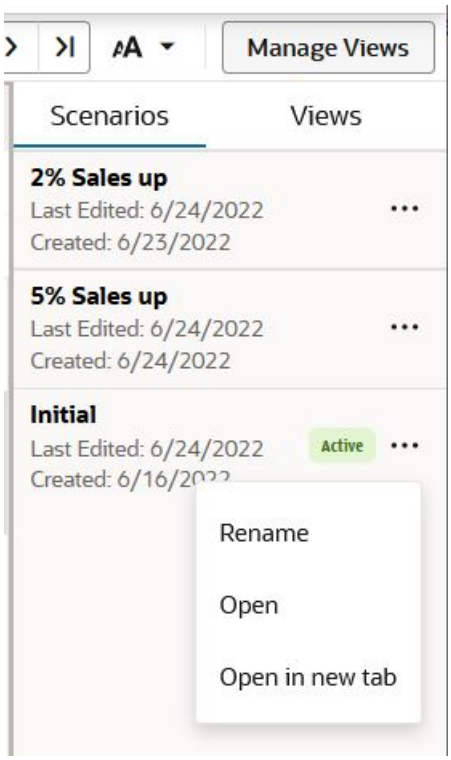
By default only three scenarios are allowed (including master scenario), but this is configurable from **System Configuration**. Once you have created three scenarios and the master scenario, the **+** icon and the duplicate action are not available and you cannot create more scenarios.

Figure 19-7 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 19-8, the 2% Sales Up scenario is promoted to the master scenario by clicking **Promote Scenario**.

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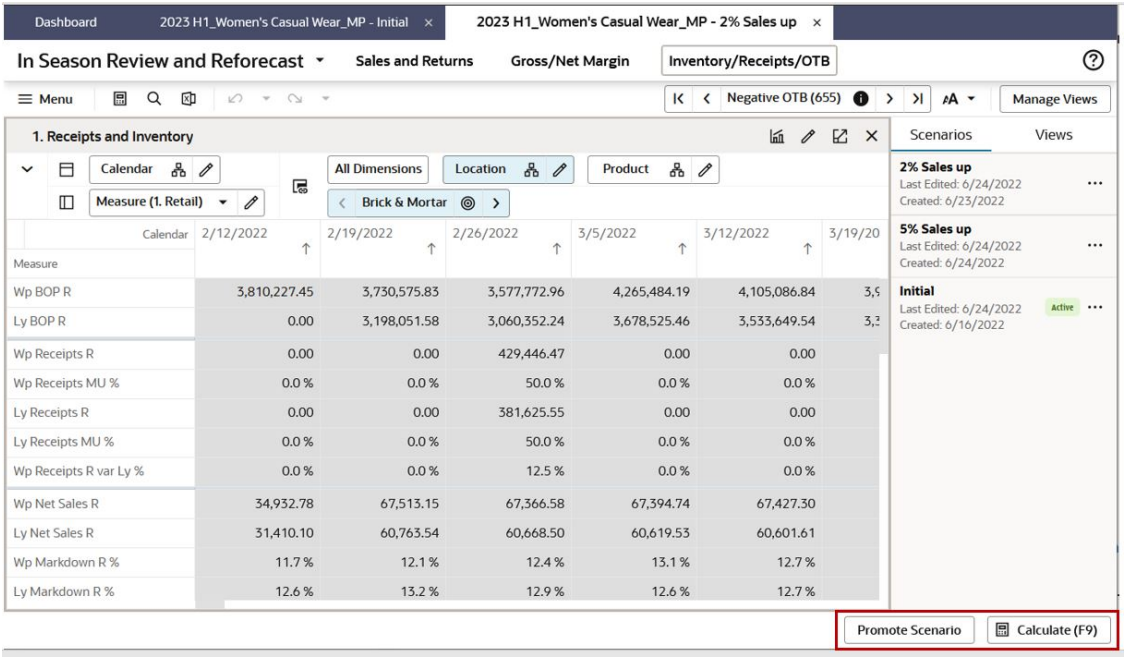
Figure 19-8 Promote Scenario



After you click Promote Scenario, a toast notification is displayed, as shown Figure 19-9. 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 19-9 Toast Notification During Promote Scenario

The 2% Sales Up scenario is now the master scenario and you can commit the data.

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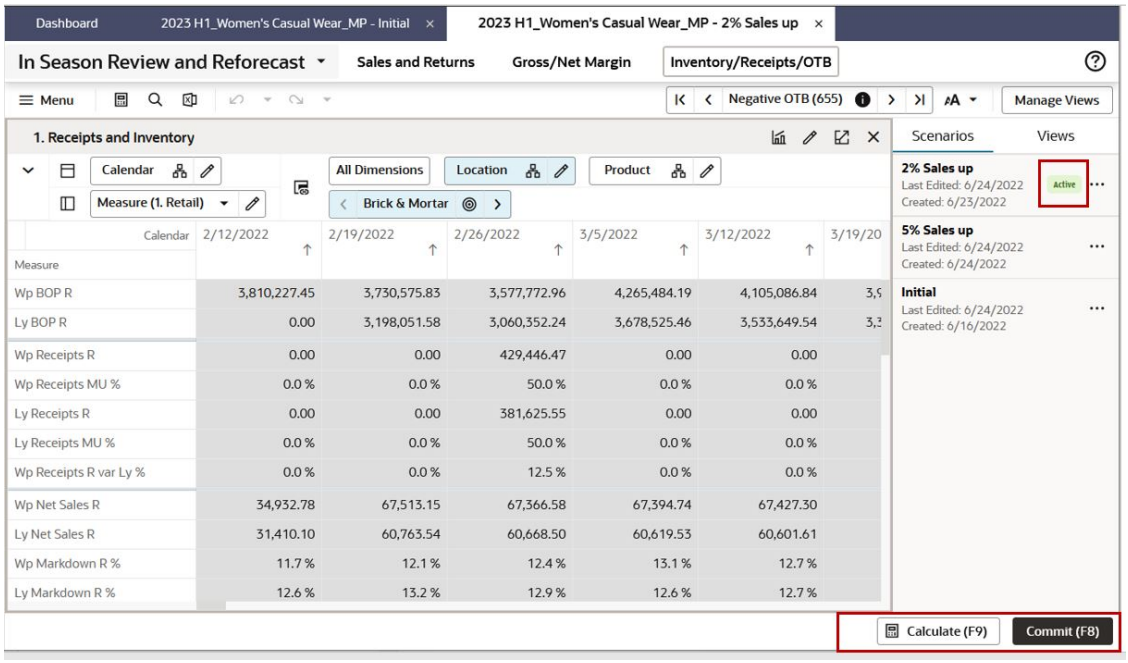
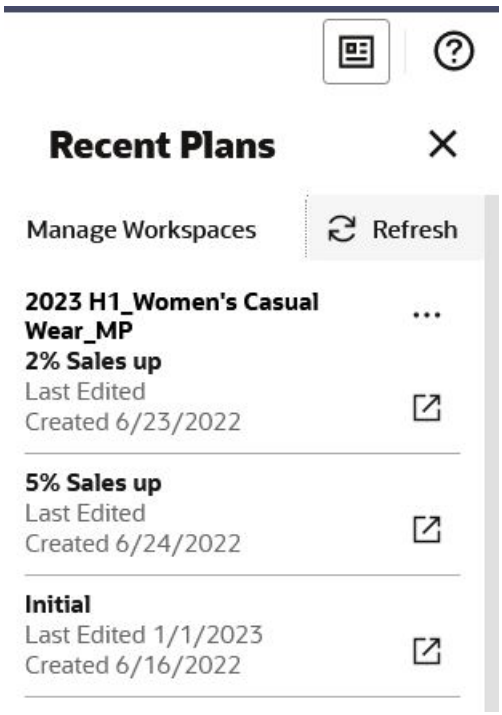
Figure 19-10 What-If Scenario Promoted to Master Scenario



Viewing All Scenarios from the Dashboard

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

Figure 19-11 View Scenarios using the Dashboard



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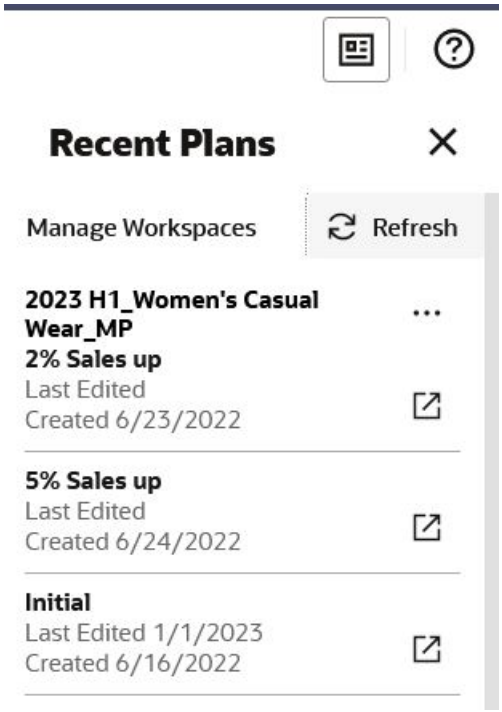
You can view the last opened date and time for the workspace.

Figure 19-12 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 RPASCE, you can associate an image for any dimension with a configured media attribute, including calendar levels. These images can be stored on a website that must be declared under the safe hosts for the application to display the images.

Image Actions

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 using View/Manage Images.

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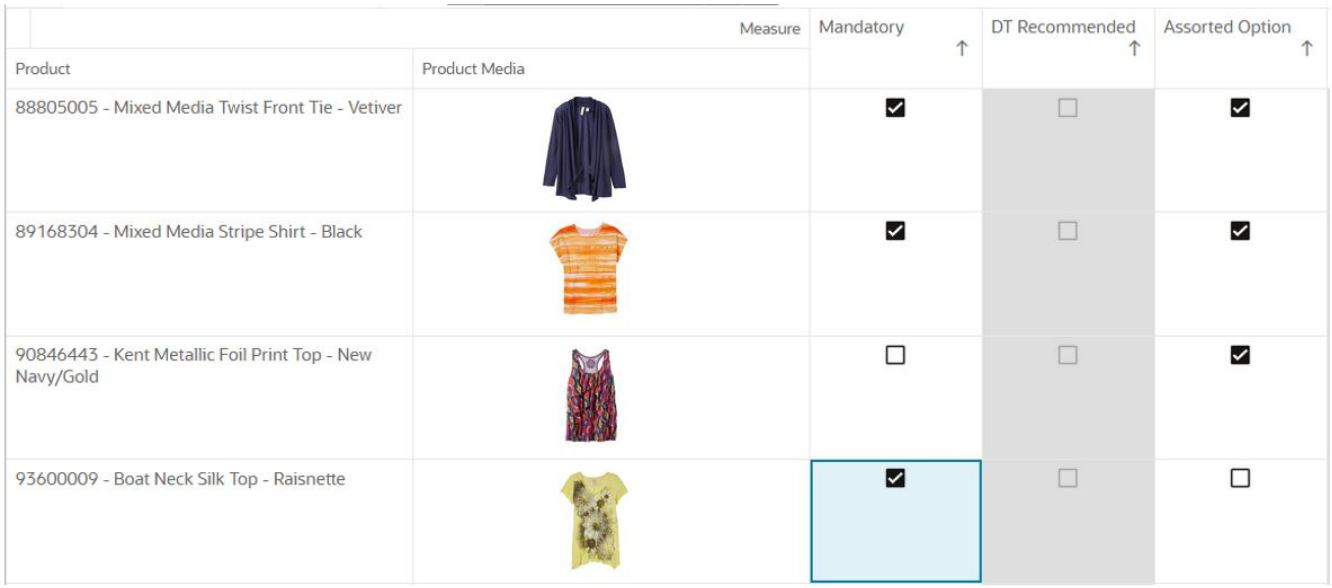
Pivot table headers display images for visible media dimension attributes. If there is more than one visible image attribute, all of their primary images (thumbnail-sized version) will be shown in a carousel control. Only one of the images can be seen at any given time. The user can scroll through all the images by clicking the left and right arrow controls that appear on either side of the image.

Figure 19-13 Image Display



You can right-click the images and perform the following actions:

- **View/Manage Images:** Launches the View/Manage Images window
- **Hide Images:** Hides the images.

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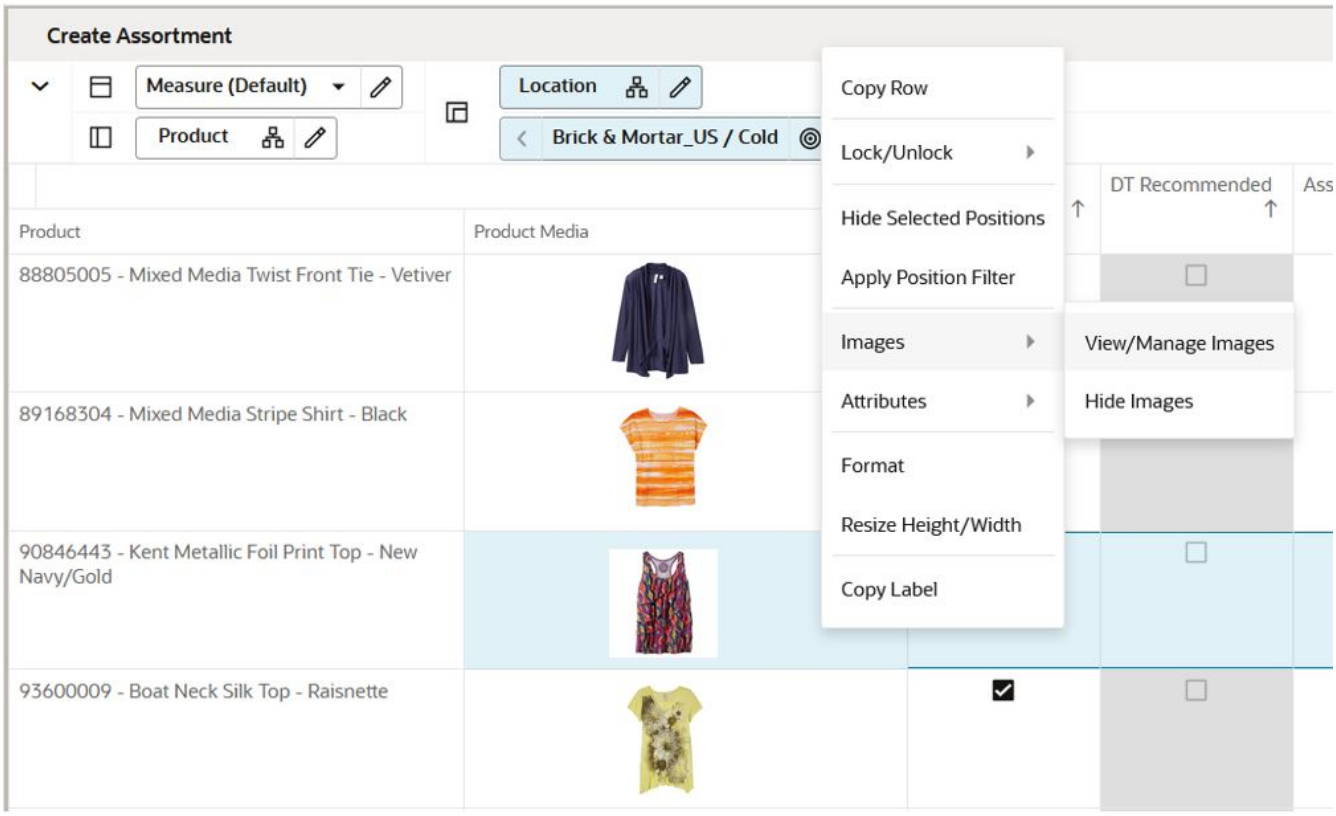
Figure 19-14 Image Cell Actions



Viewing and Managing Images

Right click on the images to launch the Figure 19-15. 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.

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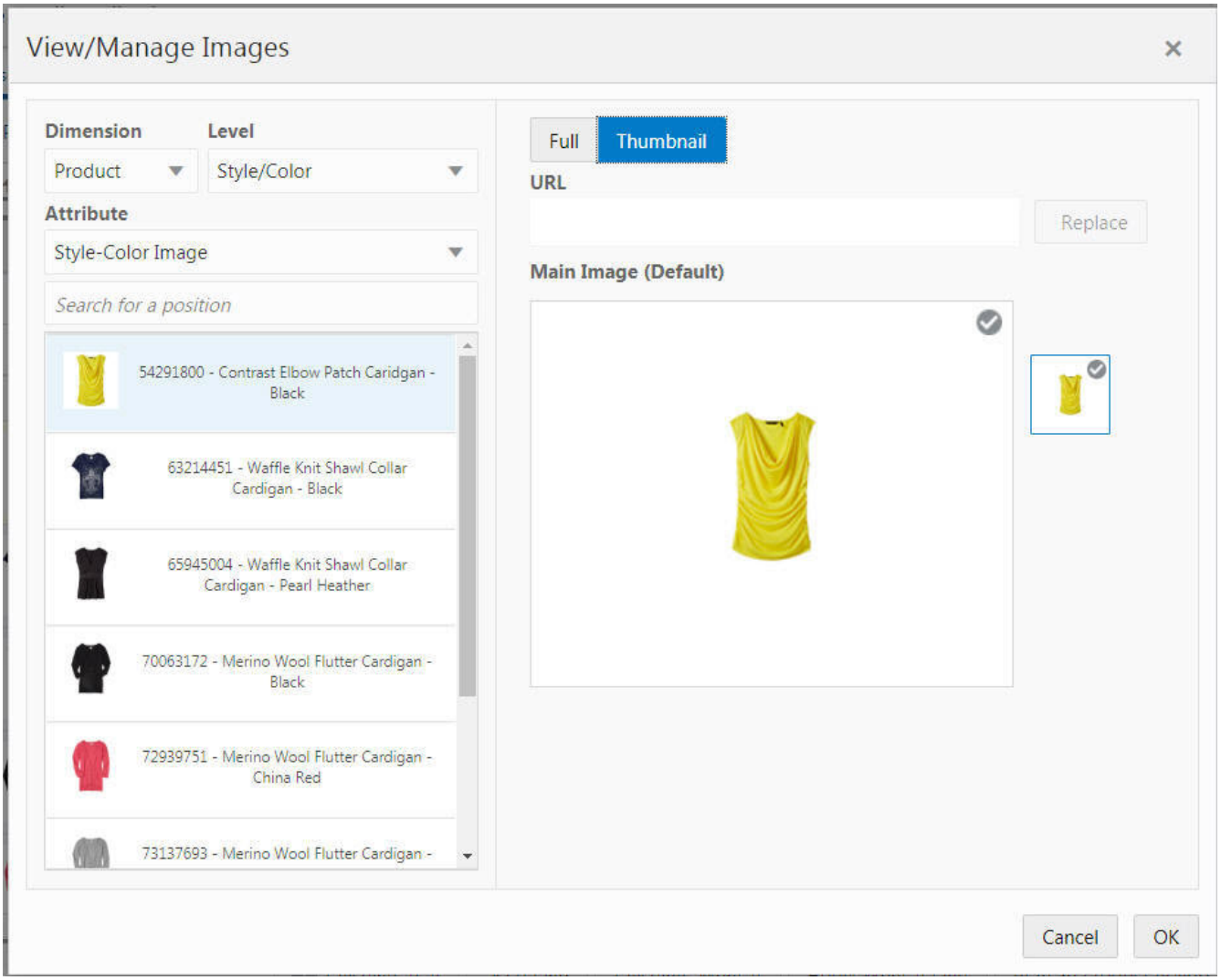
Figure 19-15 View and Manage Images Window



Using the URL Field

The URL text box in the Figure 19-15 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 19-16.

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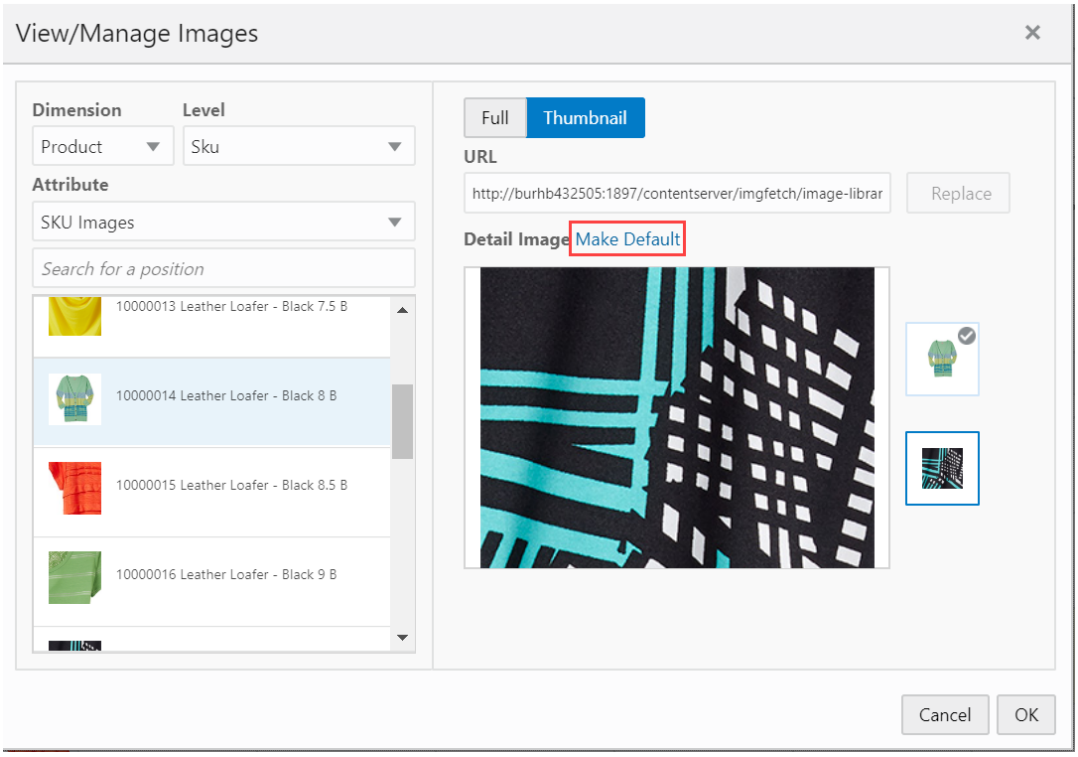
Figure 19-16 Make Default Link for an Image



- 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

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.

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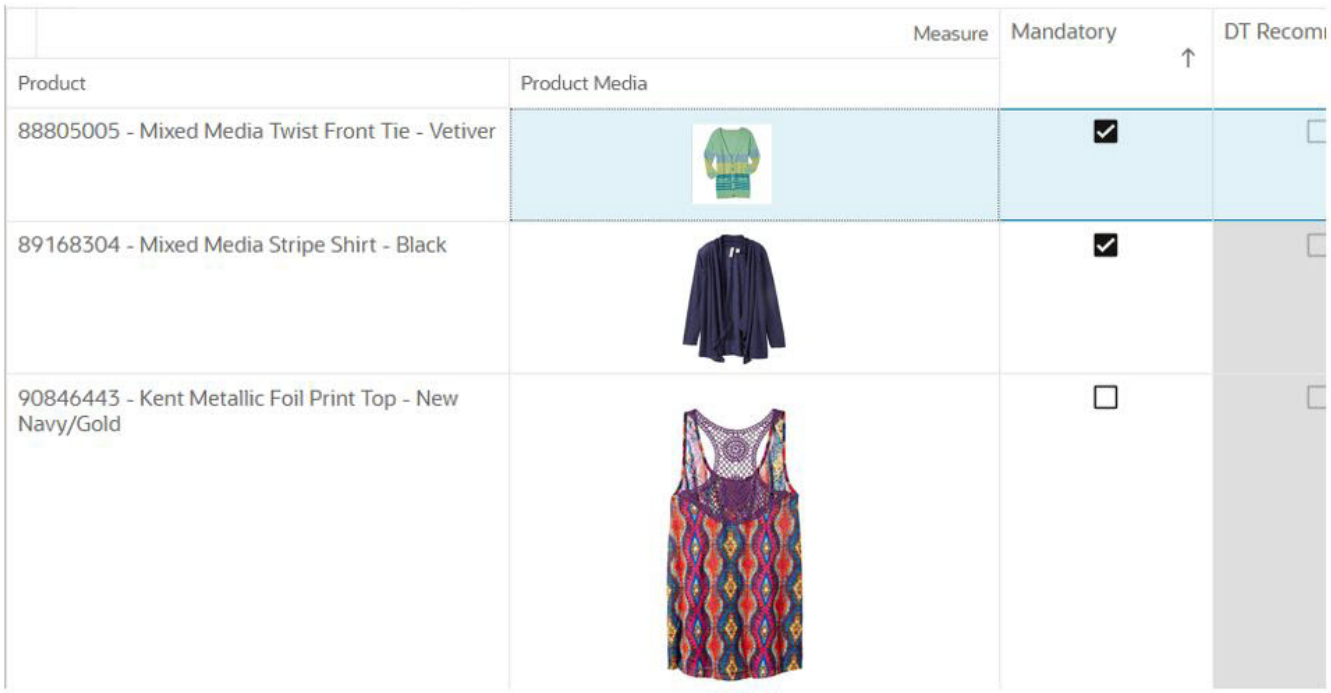
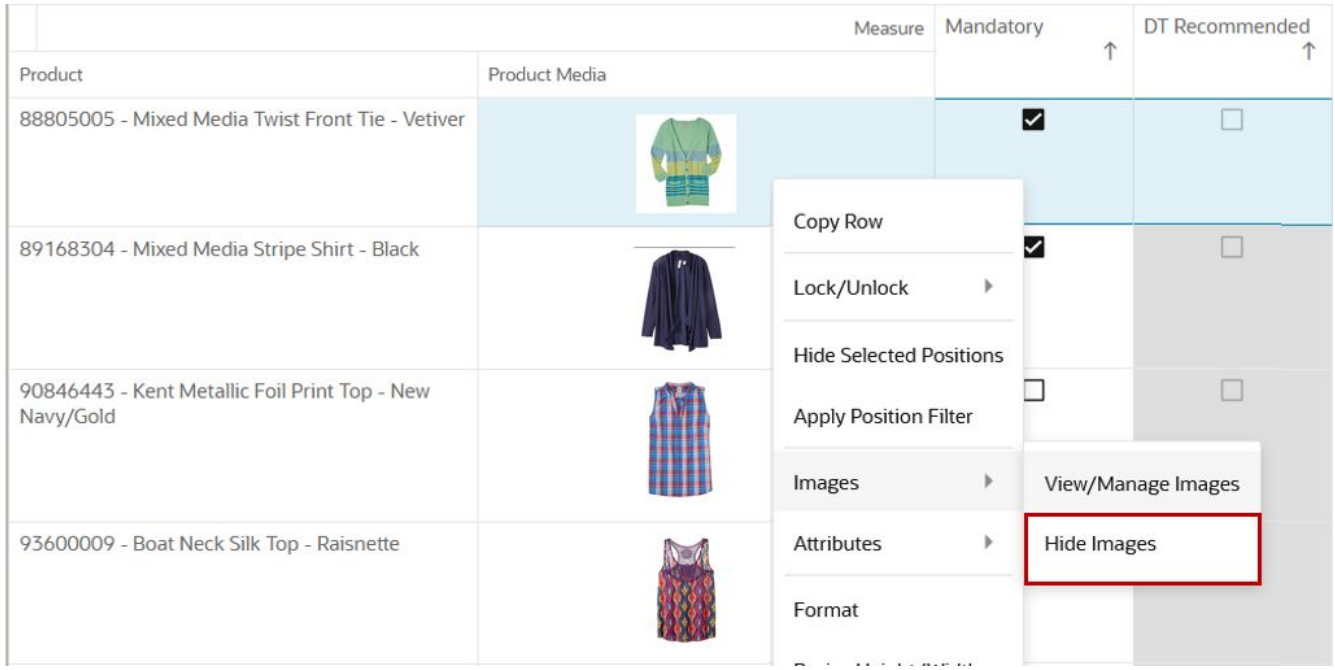
Figure 19-17 Resize Image



Showing or Hiding Images

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

Figure 19-18 Hide Images



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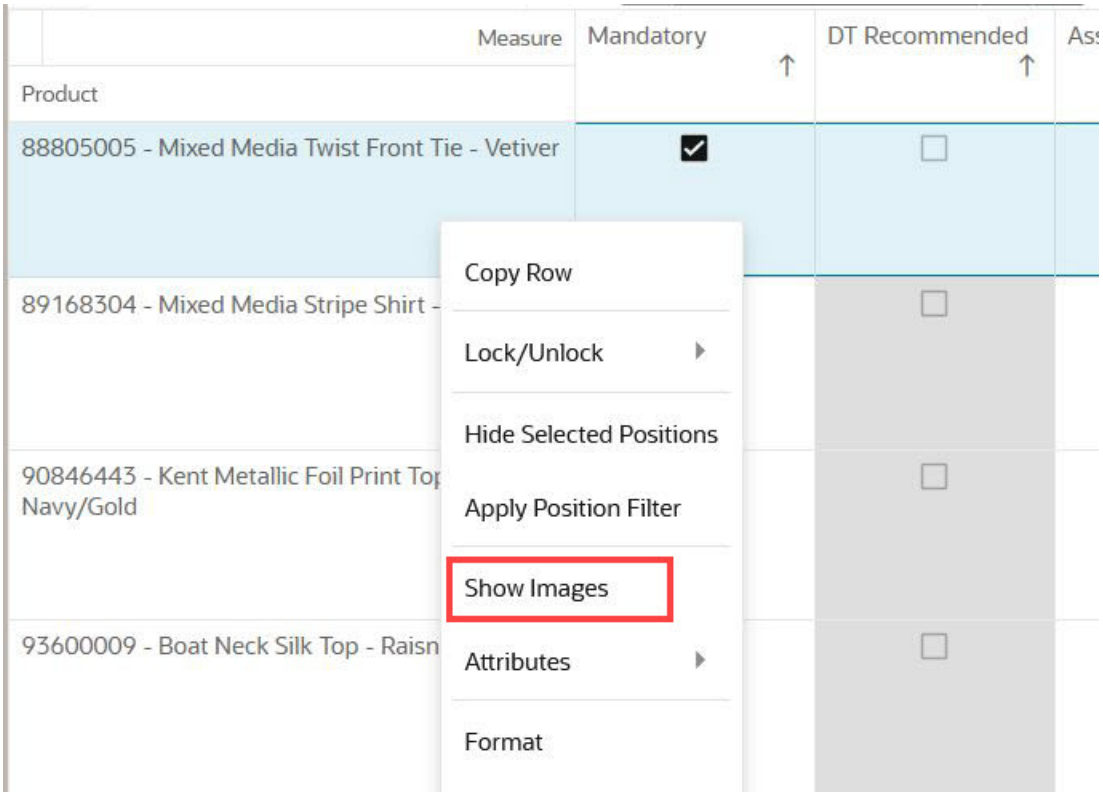
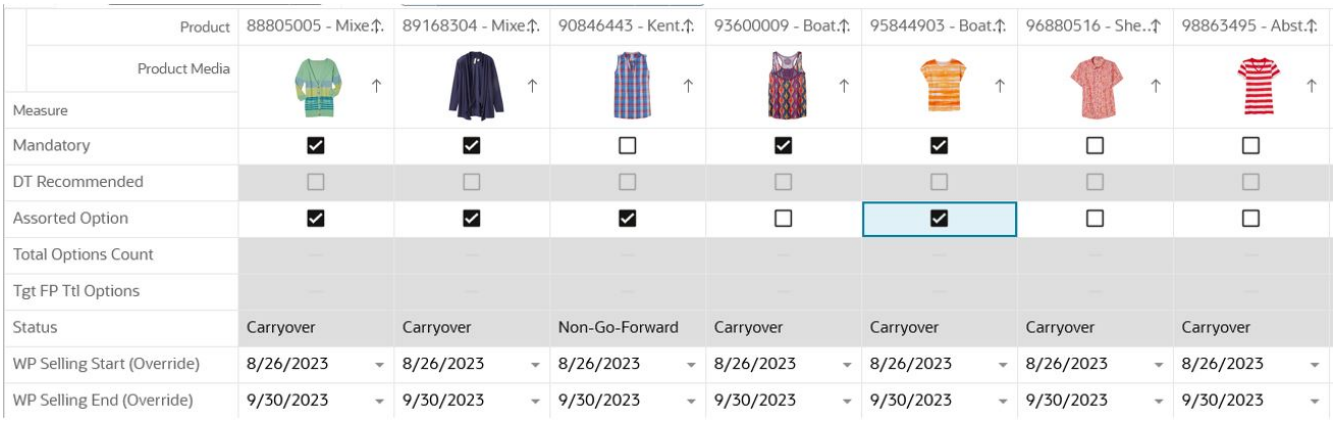
In order to view images, you can click on the dimension position where images are enabled and click **Show Images**.

Figure 19-19 Show Images



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

Figure 19-20 Image Display with Axis Pivot



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

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Figure 19-21 No Image Icon

Figure 19-22 Broken Image Icon

Enlarge Image

Double-click the image to expand it and get a better look. The enlarged image gives a better understanding of the image. After double-clicking the image, the enlarged image opens in a window that opens in the middle of the screen. On the expanded image window, you can see all facets of image shown on the left side, the position name on top of the dialog box. You can hover over the expanded image to see the zoom-in image.

Figure 19-23 Enlarge Image Window

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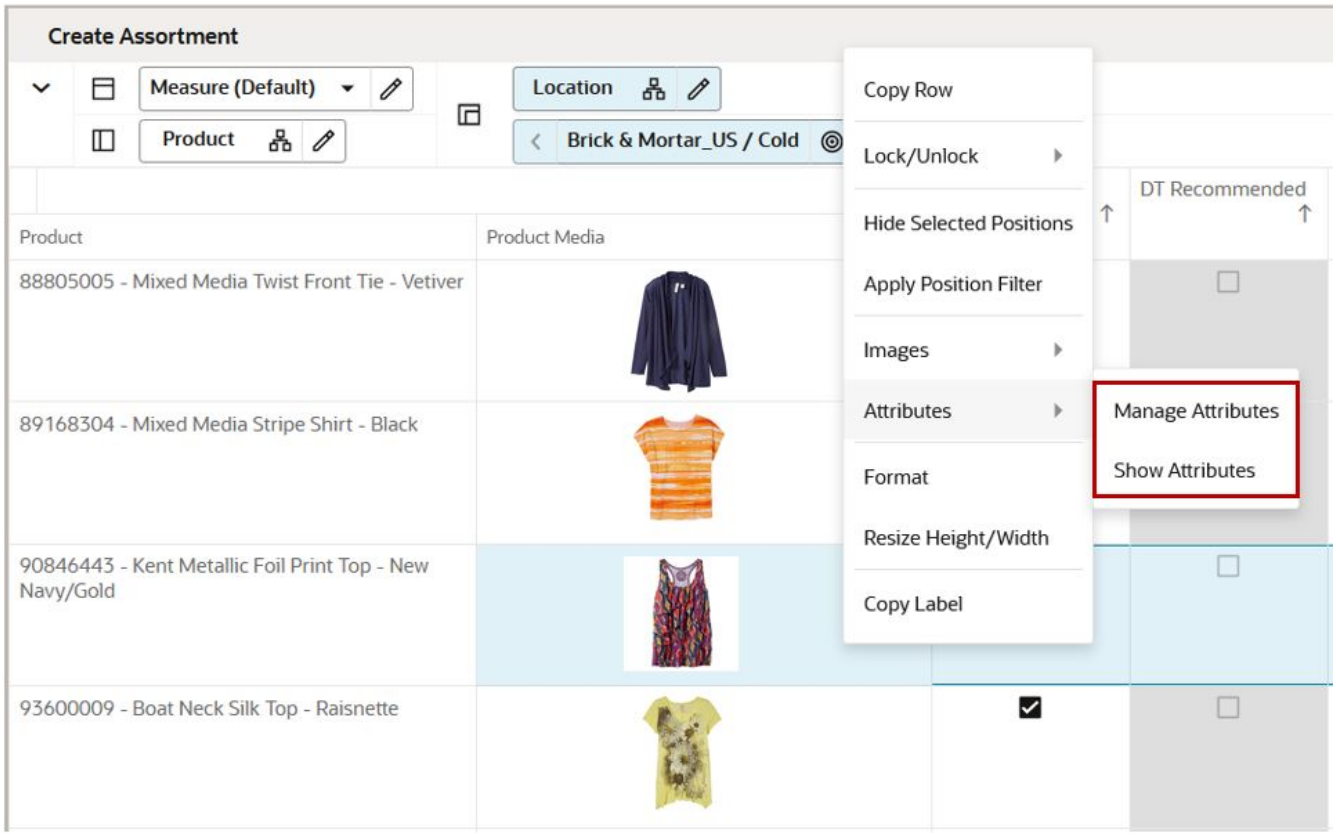
Managing Attributes

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 19-24 Manage Attributes



To sort or view attributes, complete the following steps:

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

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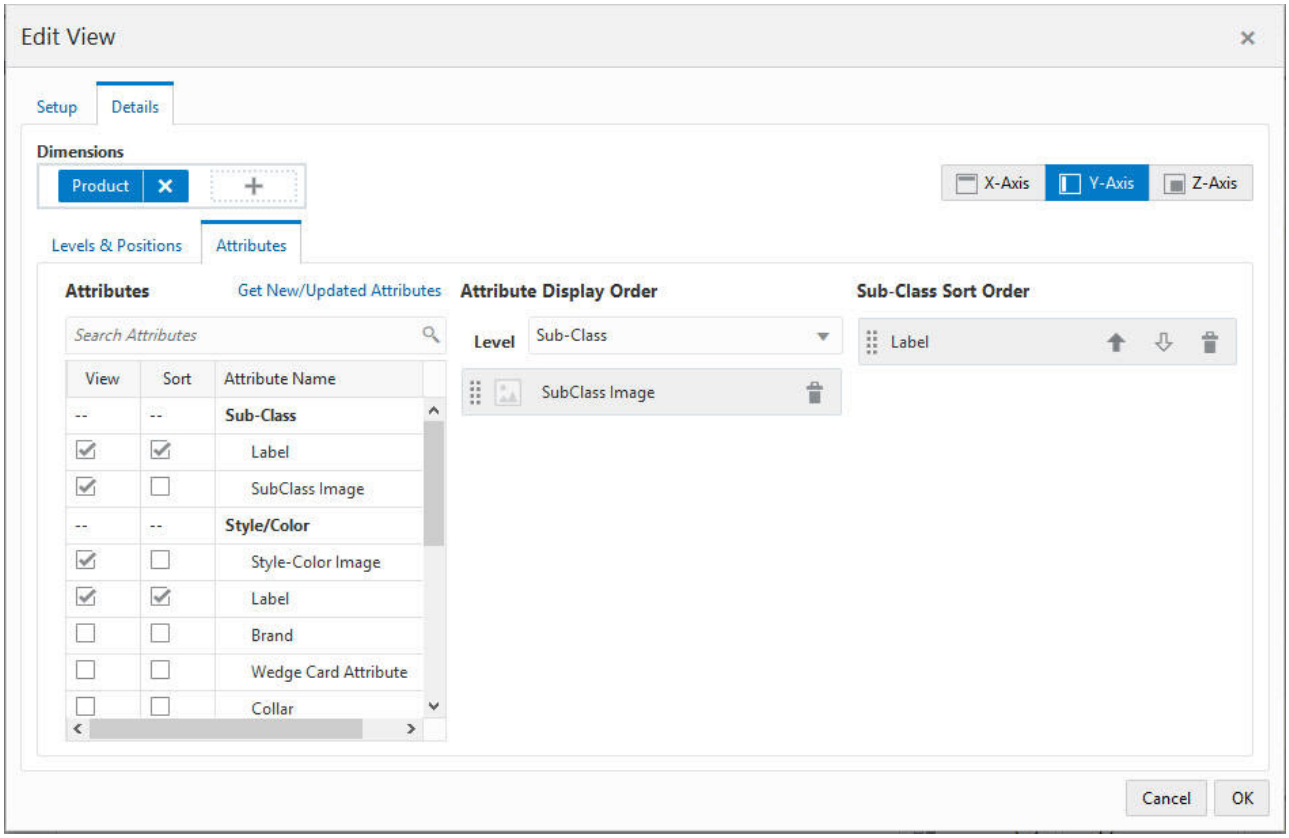
Figure 19-25 Select Attributes for Viewing and Sorting Positions



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.

Extended Measures

You can use an extended measure to define, view, and edit a measure as a proportion or percentage of another measure for a parent that is up one or more levels. These measure relationships are also referred to as participation measures. These measures are defined in the pre-configured RPASCE in a view using the configuration.

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

- **Absolute Percent of Parent:** A percentage of a fixed level (such as class) so that the participation of each item to the class can be viewed and manipulated.
- **Relative Percent of Parent:** A percentage to the next level shown in any dimension (such as Product).
- **Ranking:** A value that indicates the relative order of positions in either ascending or descending order.
- **Cumulative Sum:** A sequence of partial sums of a given sequence, based on an ascending or descending rank.

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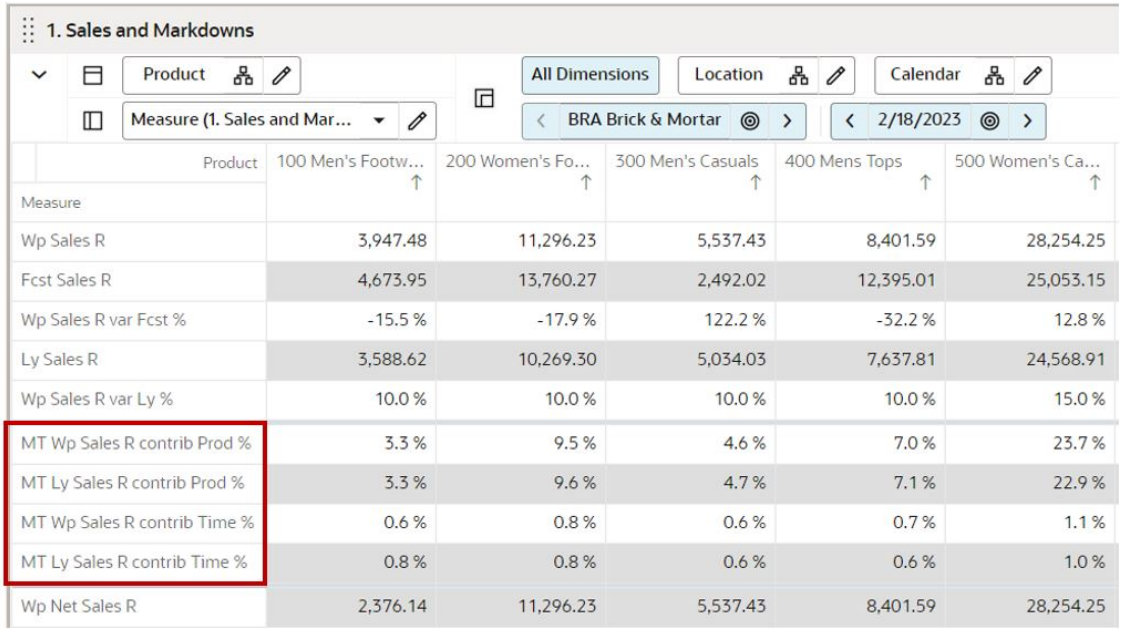
- **Cumulative Percent:** A sequence of partial sums of a given sequence, based on an ascending or descending rank expressed as a percentage to the total.

Figure 19-26 Extended Measure



Product / Measure	100 Men's Footw...	200 Women's Fo...	300 Men's Casuals	400 Mens Tops	500 Women's Ca...
Wp Sales R	3,947.48	11,296.23	5,537.43	8,401.59	28,254.25
Fcst Sales R	4,673.95	13,760.27	2,492.02	12,395.01	25,053.15
Wp Sales R var Fcst %	-15.5 %	-17.9 %	122.2 %	-32.2 %	12.8 %
Ly Sales R	3,588.62	10,269.30	5,034.03	7,637.81	24,568.91
Wp Sales R var Ly %	10.0 %	10.0 %	10.0 %	10.0 %	15.0 %
MT Wp Sales R contrib Prod %	3.3 %	9.5 %	4.6 %	7.0 %	23.7 %
MT Ly Sales R contrib Prod %	3.3 %	9.6 %	4.7 %	7.1 %	22.9 %
MT Wp Sales R contrib Time %	0.6 %	0.8 %	0.6 %	0.7 %	1.1 %
MT Ly Sales R contrib Time %	0.8 %	0.8 %	0.6 %	0.6 %	1.0 %
Wp Net Sales R	2,376.14	11,296.23	5,537.43	8,401.59	28,254.25

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.
- The extended measure (for example, WP Net Sls Rtl cnt Prod %) represents the relative percentage of the parent (POP) on the PROD hierarchy. When the **% contrib Prod** parent measure is revised to 0 at the end of the year, then weeks for where no sales plan for the department exist, the product totals are changing during the recalc. To keep the weekly data unchanged, then modify the **cnt Prod %** cells in the lower intersection instead. Then the parent cells in aggregate intersection are automatically locked.
- When a cell is modified for the **cnt Prod %** (for example, YEAR_DEPT_STOR) intersection and calculated, the Calc Engine first locks the parent at the (for example,

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YEAR_DVSN_STOR) intersection. Next it adjusts the corresponding cell for the base measure in the YEAR_DEPT_STOR intersection to match the specified percentage. The difference between the old and new values of that cell is then distributed among the other sibling cells in the YEAR_DEPT_STOR intersection proportionally. Consequently, these changes propagate down to the WEEK_DEPT_STOR intersection proportionally, affecting all the weekly cells.

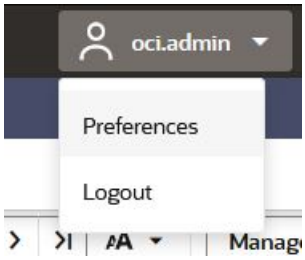
- When the parent aggregation is not visible, the system displays an error. This is because the relative POP measure has dynamic parent level which is the next visible higher level. Make sure the measure is visible to avoid this error.

User Preference Module

The User Preference module allows you to control different aspect of the system as needed. For example, you can use the User Preference module to manage what kinds of notifications you want to receive. This provides you a central location to set the preferences. This provides you a central location to set the preferences.

To access the User Preference module, click the **user name** and select **Preferences**.

Figure 19-27 User Preference Module Access



The User Preference module displays these sections:

- Notifications
- Copy / Paste Preferences
- Keyboard Shortcuts

Notifications Section

Manage your notifications with the toggle to switch On or Off the messages you are interested in. A full toggle indicates that the notification is On. An empty toggle indicates that the notification is Off.

This enables you to manage and see the notifications that are meaningful to you.

The Notifications section displays two categories:

- Global Messages
- Contextual Messages

Use the Message Duration list to select the time duration that messages display. For example, *3 Seconds*, *5 Seconds*, and so on.

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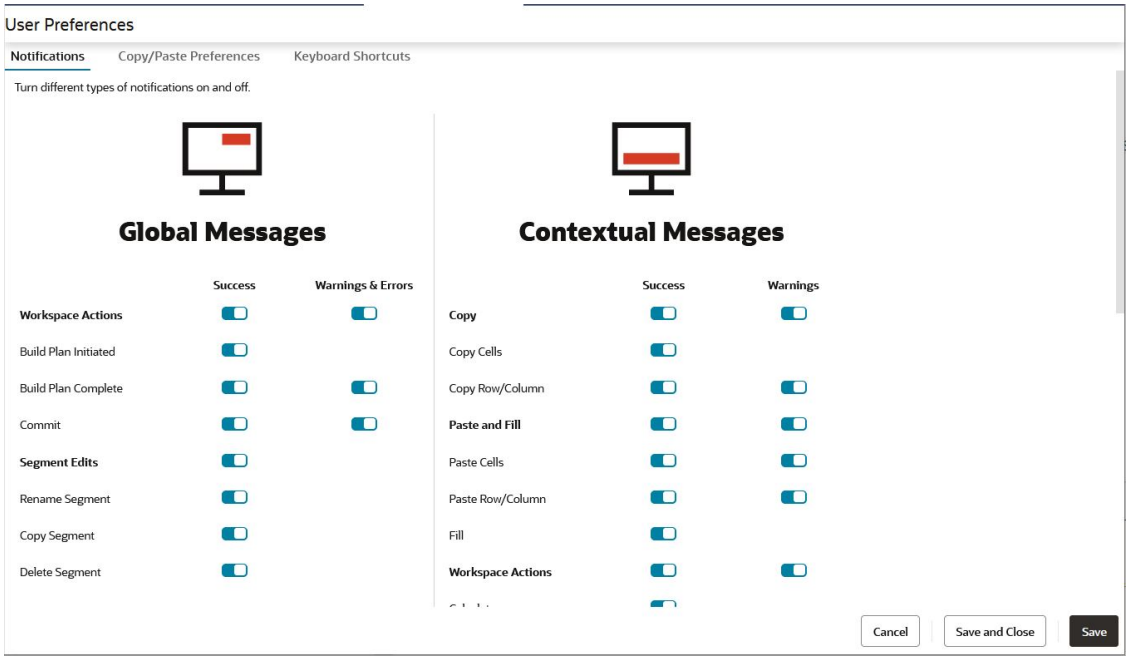
Figure 19-28 Notifications Section Displays that All Notifications are On



Global Messages

Global messages appear on the top right corner of your application. Manage your Global Message notifications with the toggle to switch On or Off the messages you are interested in.

You can enable or disable the success or warning messages for following notifications:

Table 19-1 Global Messages

Global Messages	Success or Warning
Workspace Actions	
Build Plan Initiated	Success
Build Plan Complete	Success and Warning
Commit	Success and Warning
Segment Edits	
Rename Segment	Success
Copy Segment	Success
Delete Segment	Success

Contextual Messages

Contextual messages appear at the bottom of your application. For Contextual Messages, select notifications for Success and Warnings.

The following table shows how the Contextual Message notifications are grouped under heading based on the features.

You can enable or disable the success or warning messages for following notifications:

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Table 19-2 Contextual Messages

Contextual Messages	Success or Warning Notifications
Copy	
Copy Cells	Success
Copy Row/column	Success and Warning
Paste and Fill	
Paste Cells	Success and Warning
Paste Row / Column	Success and Warning
Cut / Fill	Success
Workspace Actions	
Calculate	Success
Commit	Success and Warning
Commit Confirmation	Success
Delete Format	Success
Undo / Redo	Success
Workbook Refresh	Success
Planning Actions	Success
Filters	
Special Filters	Success
Position Filters	Success
Remove Saved Filters	Success
Import / Export	
Import	Success
Export	Success

Message Time Duration

Use the Message Duration list to select the time duration that messages display. For example, *3 Seconds*, *5 Seconds*, and so on.

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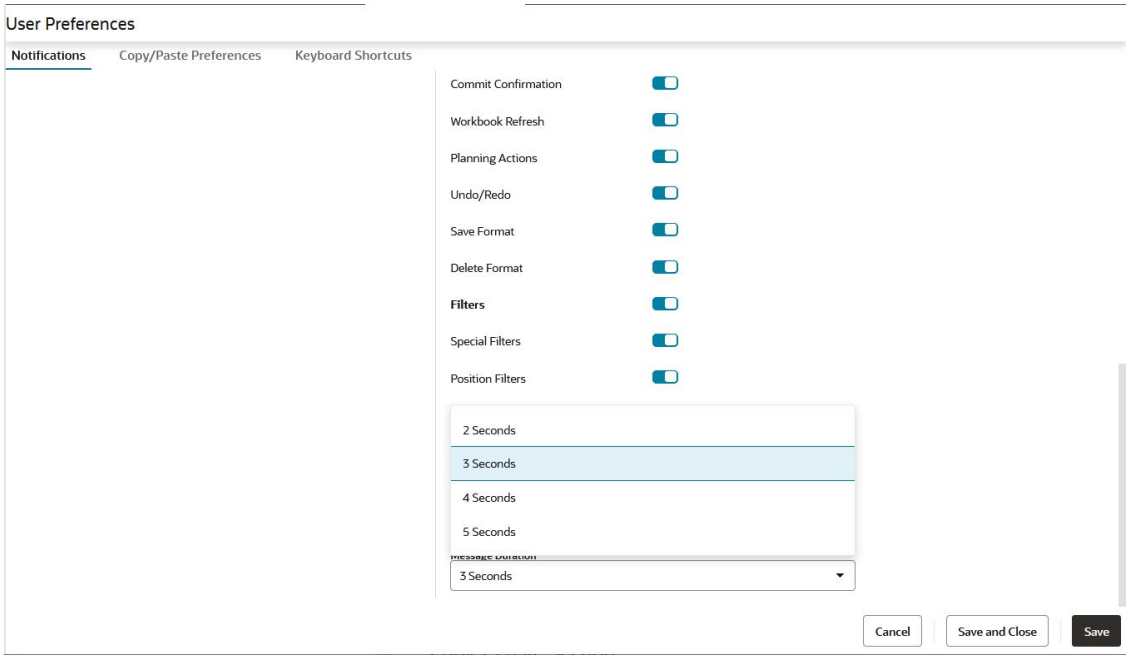
Figure 19-29 Time Duration for Notification Display



Copy / Paste Section

Manage your Copy and Paste preferences for when you use the copy and paste functionality for columns or rows.

From the User Preference module, the Copy / Paste Preferences section allows you to set the Copy Levels and the Paste Levels for either:

- Selected Level (currently visible level)
- Base Intersection (lowest level available for the selection)

Set the preference to paste NA values or not every time you use the paste function.

Set the preference for the Confirmation Message setting when you paste data to columns or rows. The copy and paste functionality for columns or rows is a permanent change which cannot be undone.

You have two options:

- Always automatically accept a column or row paste without confirmation.
- Receive a confirmation message that asks you to confirm the paste every time you use the paste functionality.

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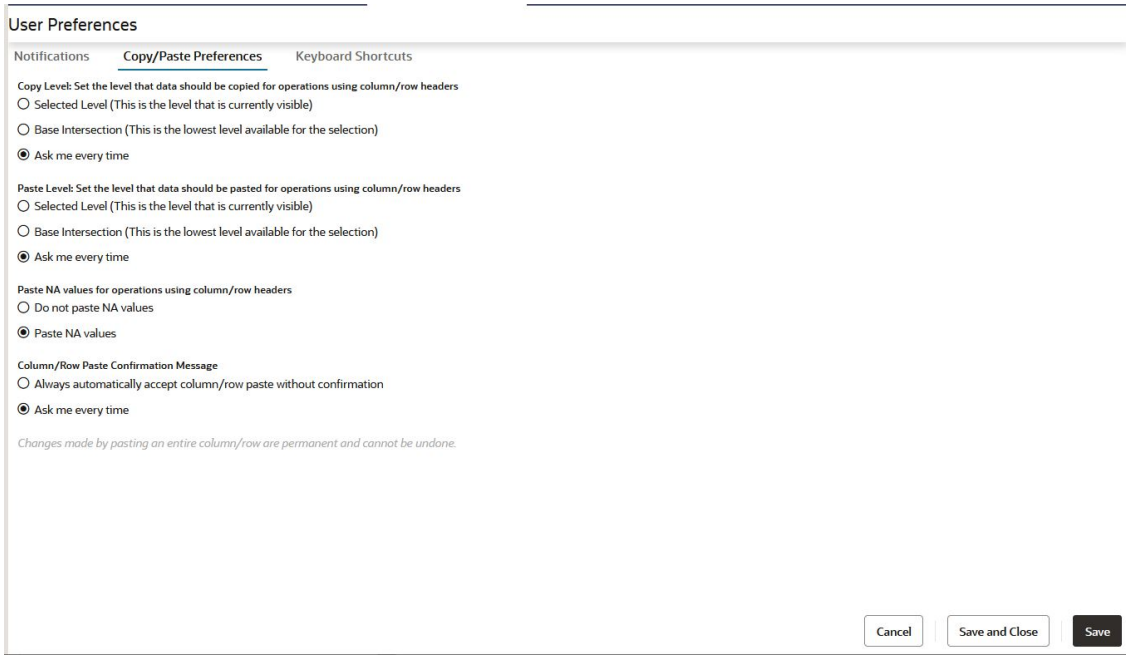
Figure 19-30 Copy/Paste Preferences Options



Keyboard Shortcuts

Enable or disable keyboard shortcuts for the Commit and Refresh actions from the User Preference module. The keyboard shortcut for **Commit** is **F8** and **Refresh** is **ALT+F5**.

Use the toggle to switch On or Off the keyboard shortcuts. A full toggle indicates that the shortcut is enabled. An empty toggle indicates that the shortcut is disabled.

Once you make changes to the User Preference module, click **Save** to save or click **Save and Close** save and close the module. If you click **Cancel**, then the changes made on the User Preference module are not saved.

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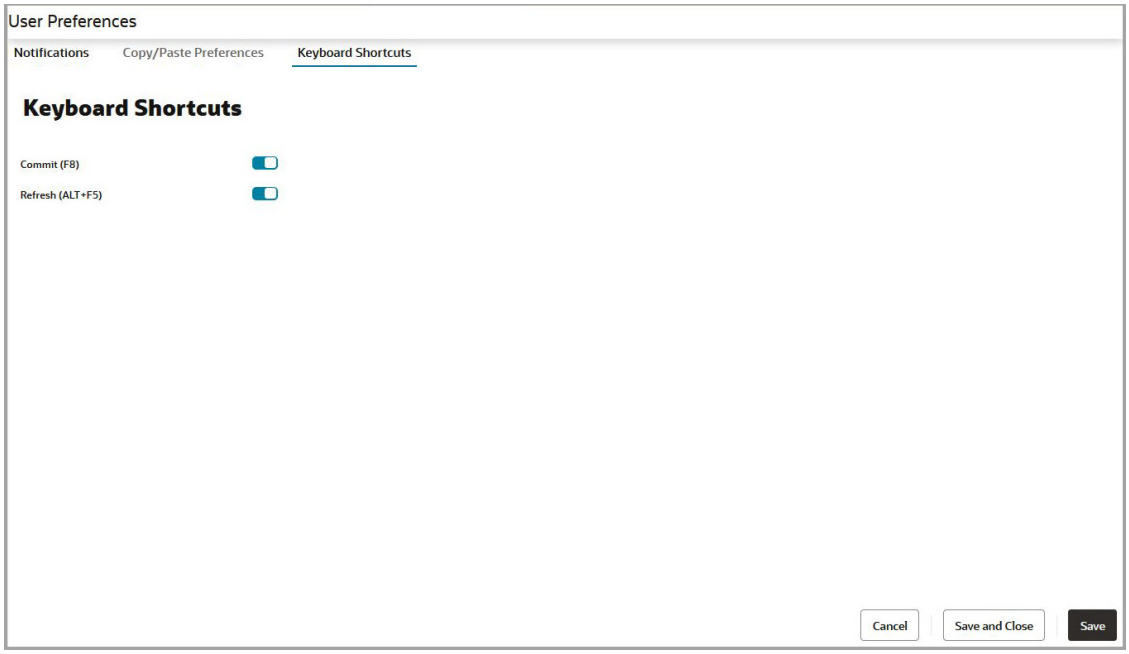
Figure 19-31 Keyboard Shortcut Preference



Import Data Using Microsoft Excel

Importing data is a flexible feature which allows you to transfer large data to pivot table using an Excel spreadsheet. You can upload writable measures using a template without an administrator or technical support help. You can bring data into the RPASCE system using an Excel spreadsheet directly from application UI.

Importing data is a two-step process:

1. Download the Excel template of the view that you wish to upload the data to.
2. After making edits to the Excel template, upload the data back into the system using the import feature.

Importing Data for a View

Follow these pre-requisites for importing:

- Importing data can only use a downloaded Excel template file.
- The position count across the x-axis (number of rows) and y-axis (number of columns) should be same between the view and the Excel template.
- The page edge position or z-axis position should be same between the view and the Excel template.
- The Block View Export should not be used for importing the data back into the view.

Perform the following steps to import data,

1. Download the Excel template of the view that you wish to upload the data to. To download the template, use the existing export to Excel feature. For details about exporting to Excel, refer to the Export chapter.

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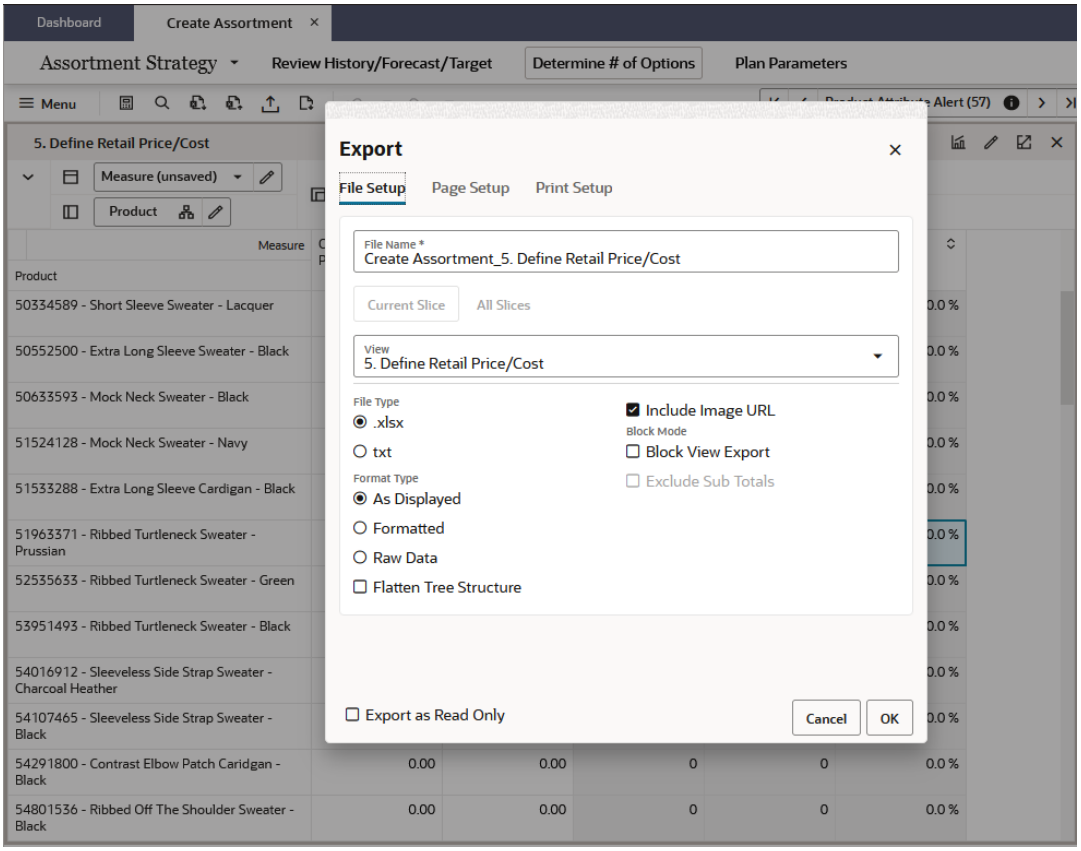
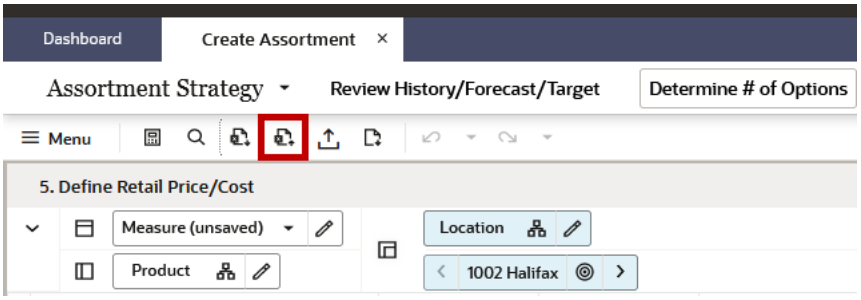
Figure 19-32 Download the Excel Template Using the Export Feature



2. Make edits in the downloaded Excel template for writable measures and save the file in your system.
3. To import the saved Excel template, use the **Import** button available from the toolbar.

Figure 19-33 Toolbar Import Button



4. Click the **Import** button and the **Import Data** window opens. Follow these steps to import the file using this window.

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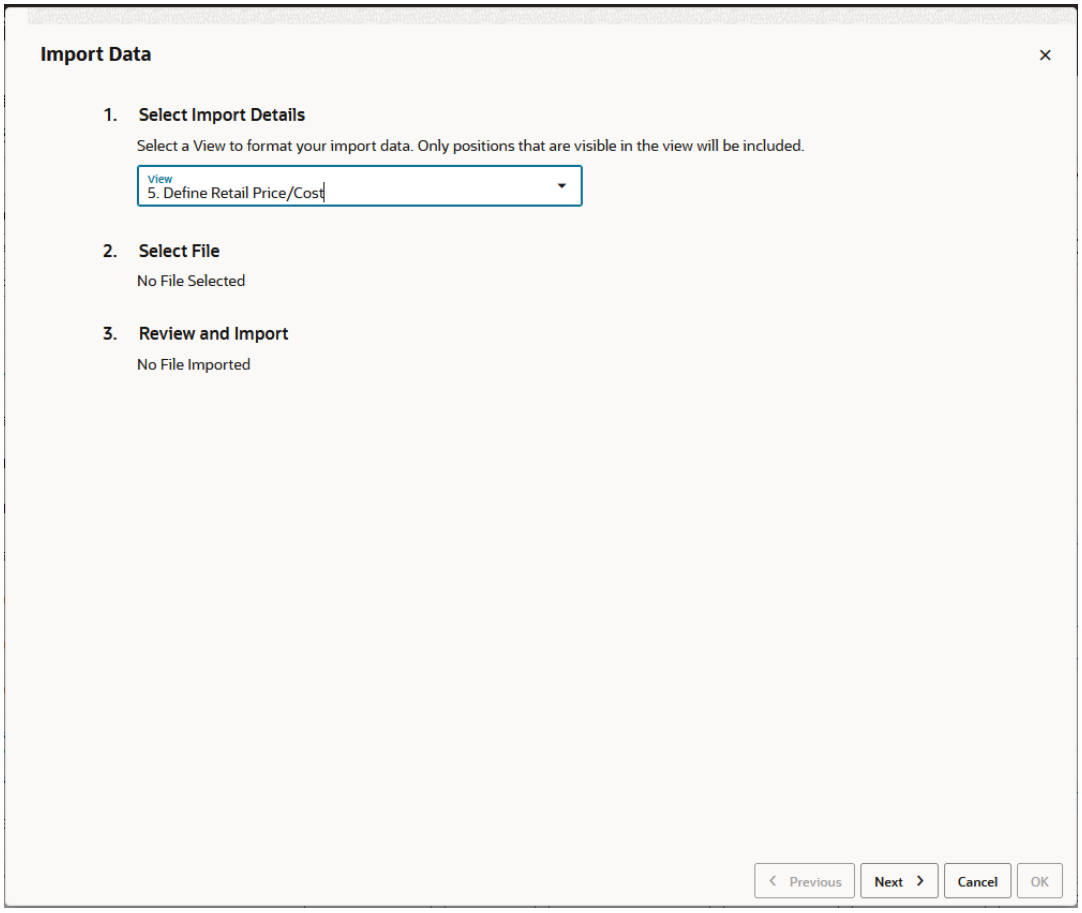
Figure 19-34 Import Data Window



5. In the **Select Import Details** field, use the drop-down menu to select your view. Select the same view as your downloaded Excel template. When only one view is visible on the screen, then the view is pre-selected, and the drop-down menu is unavailable. From the bottom of the window, click **Next**.

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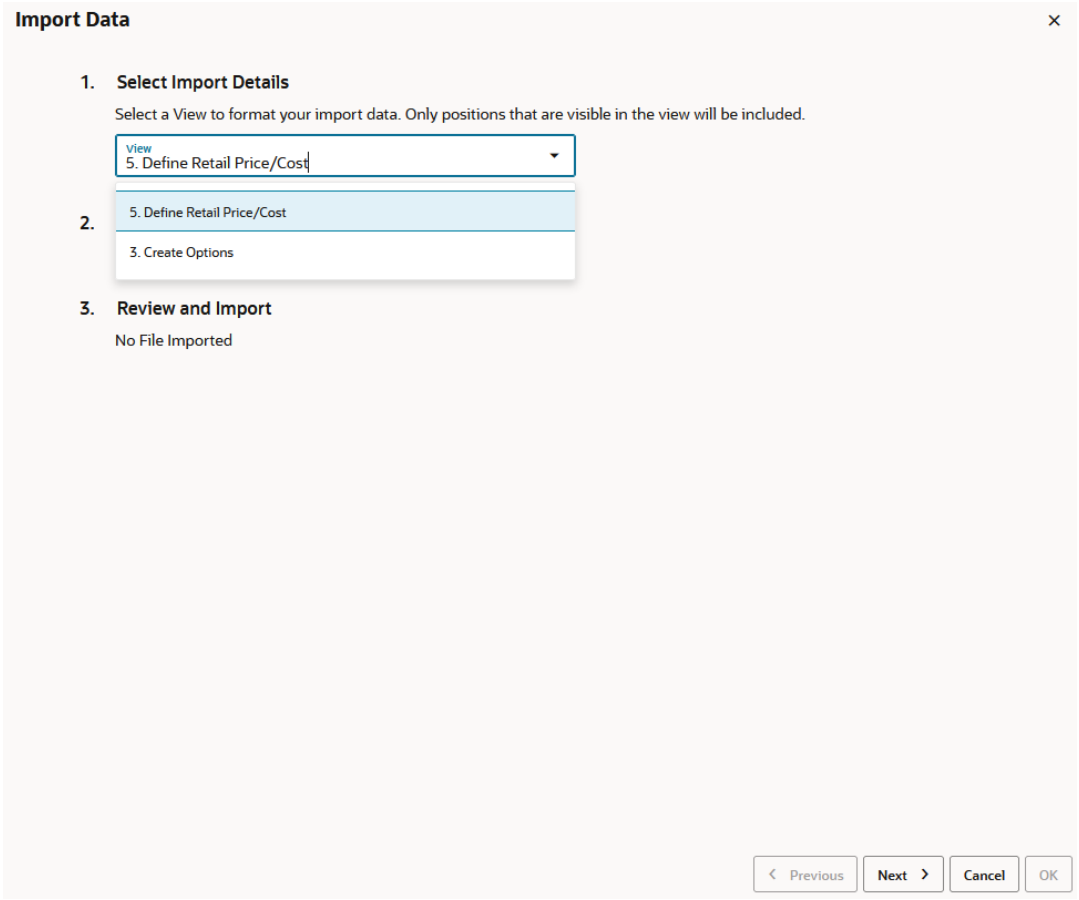
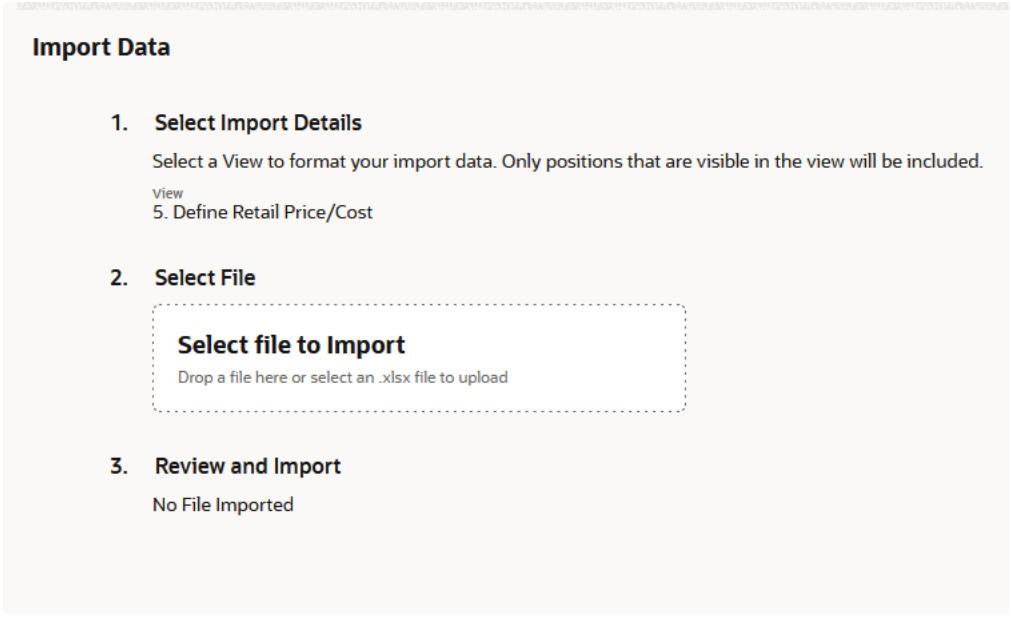
Figure 19-35 Select View from the Drop-down Menu



6. In the **Select File** field, select your edited Excel template. You can either drag and drop the file or browse to locate it in your system. Once you have made the file selection, click **Next** to move to next step. if you have selected wrong file, click **Delete** to delete the file.

Figure 19-36 Select File to Import



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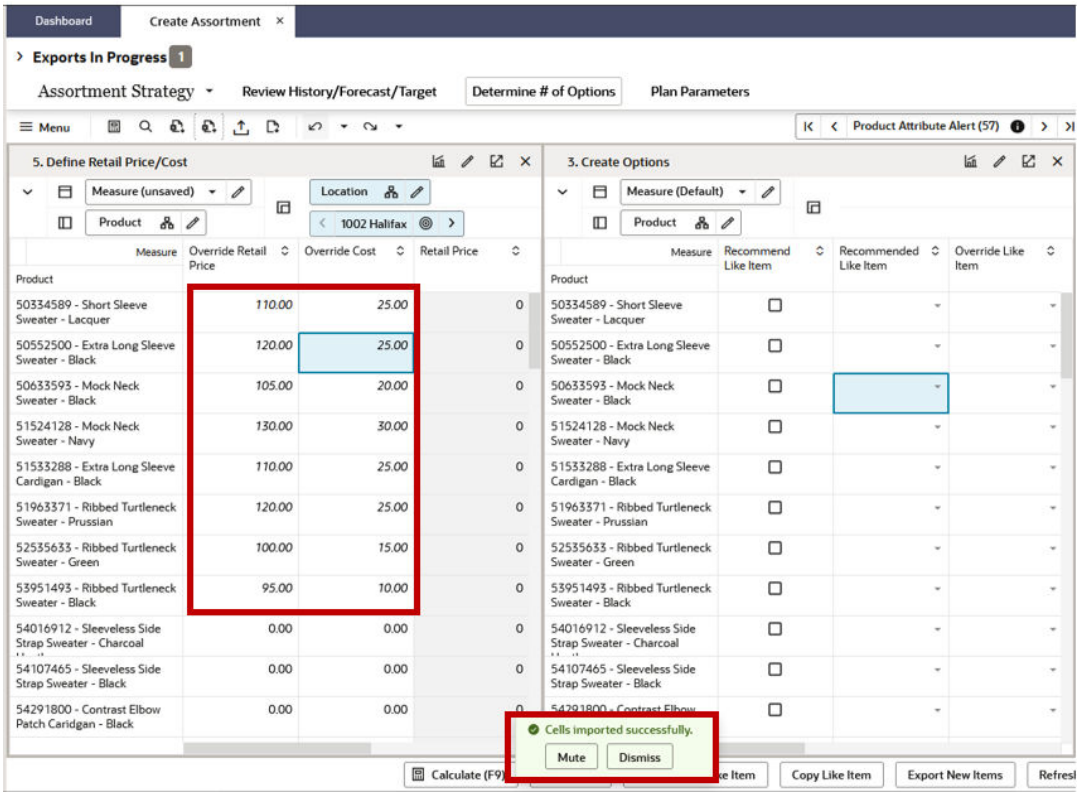
7. In the **Review and Import** phase, the system checks the Excel file format and data errors before uploading the file. If the file has no errors, then the import proceeds and the data from the Excel file is pasted on the pivot table of the selected view in edited mode. Edited mode data displays in italics. You can review the data and then click **Calculate** to accept the data. To cancel the imported data, click the **Undo** button on the toolbar to reverse the import.

Figure 19-37 Import Data in Edited Mode



8. In the **Review and Import** phase, if there is an error with file format, the system displays an error and requests to upload the correct file. This phase locates errors for file formatting such as the:

   - Number of columns or rows do not match between the view and Excel templates
   - Z-axis positions do not match between the view and Excel templates
   - Row or column position names do not match
   - Display that highlights the column, row or position; the incorrect data in the file; and the expected data.

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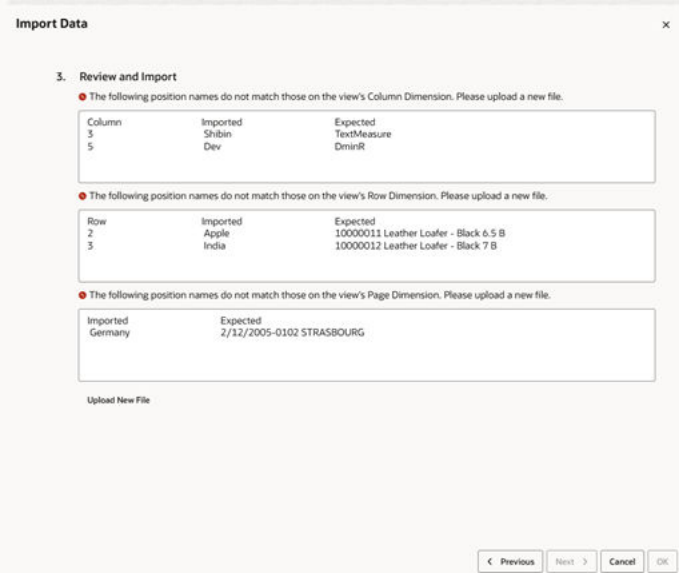
Figure 19-38 Example of Error Displayed for the Wrong File Format



9. In the **Review and Import** phase, when the file format is correct but there are data errors such as data type mismatch or the upload is for read only data, protected or locked cells; then the system displays the **Review and Import Mode** window. In the **Review and Import Mode** window, the cells with errors are highlighted and the list of errors is displayed in the navigation bar. The navigation bar is available from top of the view with a count of each error type. Using the navigation bar, you can jump to cells with errors and make changes.

   Hover over the information **i** icon to review wrong or invalid values that were imported into a highlighted cell. The information **i** icon indicates the error made and helps you to make correction.

   After making corrections to the errors, click **OK** to accept the imported data. The imported data is pasted to pivot table in edited mode and displays the data in italics. If you choose to click **OK** without correcting all the errors, then the cells with errors are ignored and rest of the data is imported to pivot table. If you want to cancel the import, click **Cancel** and start over with a correct file.

> **Note**
>
> The data import is ignored for read-only, protected, and locked cells.

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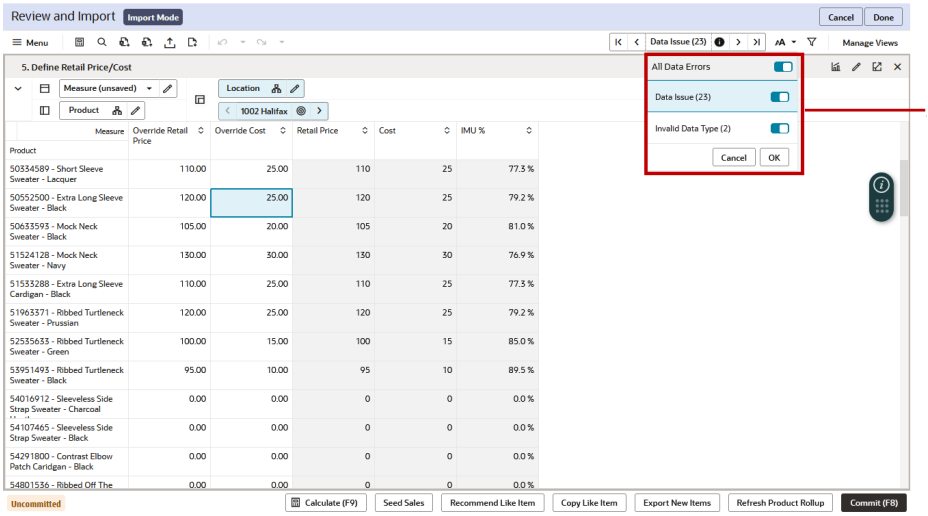
Figure 19-39 Review and Import Mode



Points to remember:

- Measure data types should match between the imported Excel template and pivot table.
- Data with uppercase and lower case are accepted.
- If the data is uploaded for an aggregated position, then the values are spread to the child position using spread method.
- Users with read-only access to the workspace cannot import data.
- Imports can be done for a single slice or z-axis position at a time.

Add Comments in Cells, Rows, or Columns

You can use the comments features to keep quick notes for yourself or you team members. This will help you to add notes for quick reference during meetings or discussions. These comments can also be used as reminders for yourself or others.

Add Comments

You can add comments in cells or column or row headers.

To add comments, perform follow the steps.

1. Select a cell or column or row header and then select **Add Comment** from the right-click context menu.

> **Note**
>
> You can add comments to read-only, locked, protected, or undefined cells; or column or row headers.

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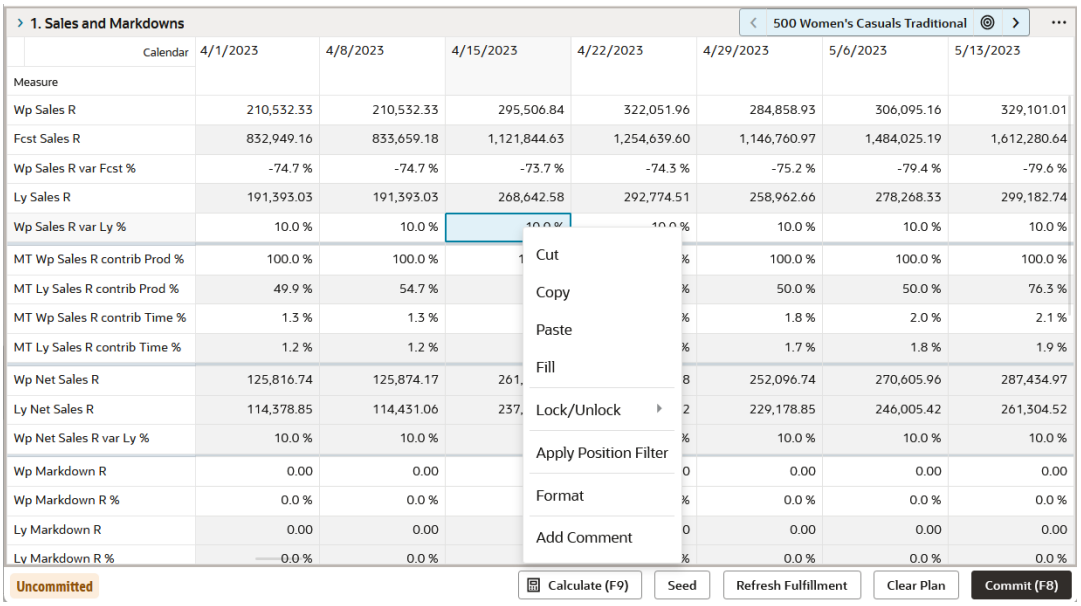
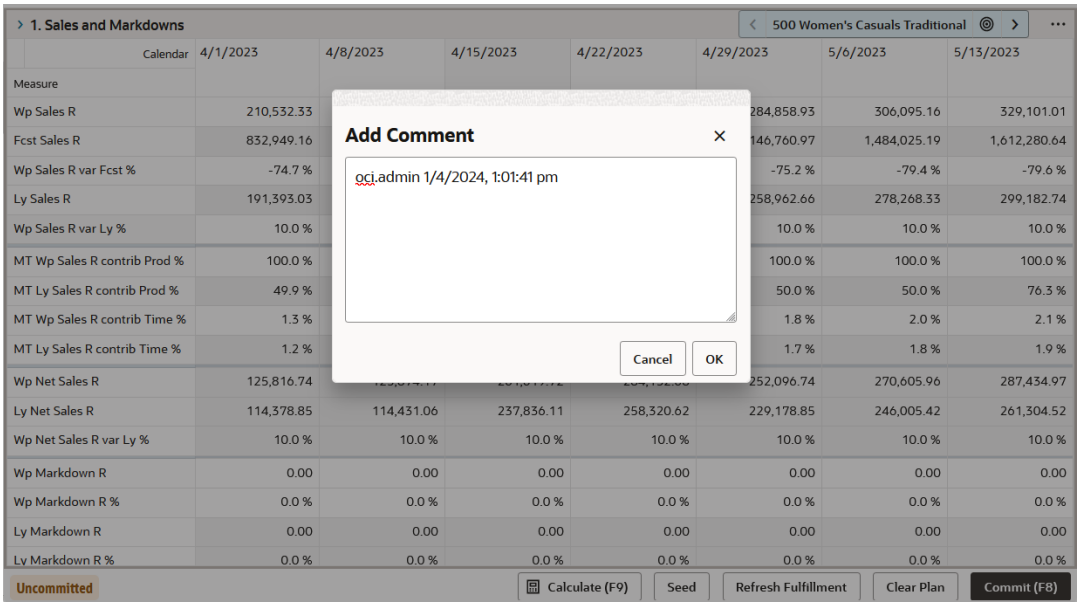
Figure 19-40 Add Comment



2. Enter the required notes or text in the **Add Comment** dialog box and click **OK**. This dialog box is pre-populated with the user name and date-time stamp.

Figure 19-41 Add Comment Dialog Box



3. The added comment is displayed using a small triangle icon on the cell or column or row header as shown in Figure 19-42. When you hover over the icon, you can read the comment content as shown in Figure 19-43.

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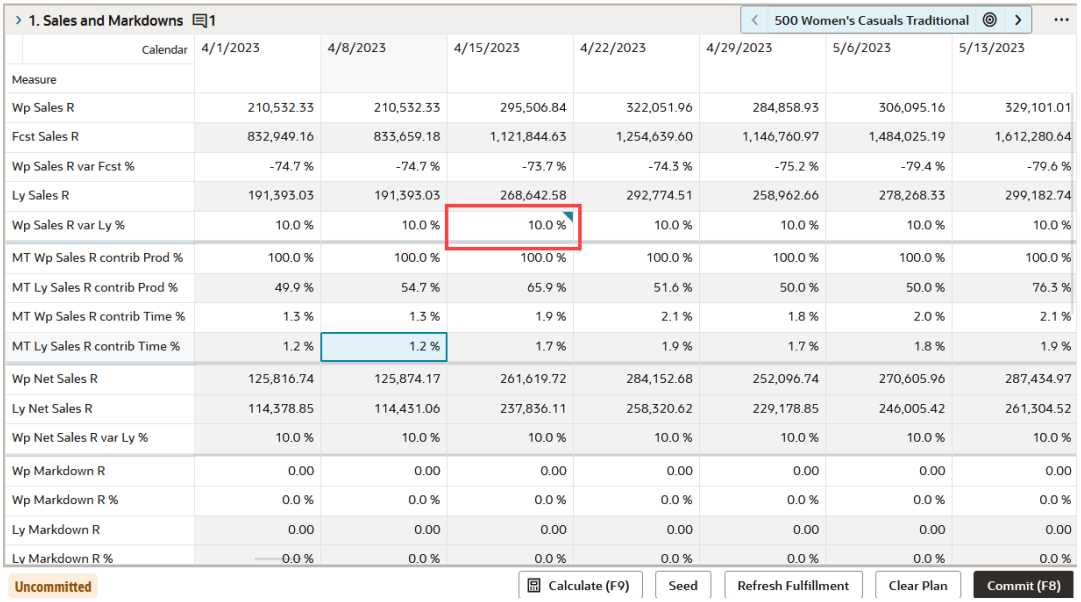
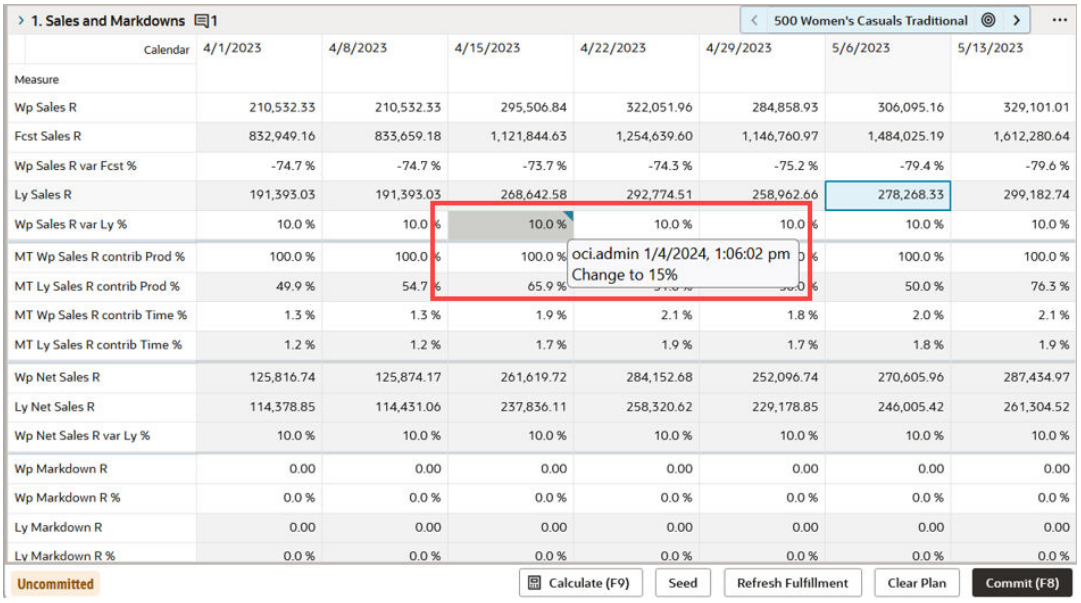
Figure 19-42 Comments Icon on the Cell



Calendar	4/1/2023	4/8/2023	4/15/2023	4/22/2023	4/29/2023	5/6/2023	5/13/2023
Measure							
Wp Sales R	210,532.33	210,532.33	295,506.84	322,051.96	284,858.93	306,095.16	329,101.01
Fcst Sales R	832,949.16	833,659.18	1,121,844.63	1,254,639.60	1,146,760.97	1,484,025.19	1,612,280.64
Wp Sales R var Fcst %	-74.7 %	-74.7 %	-73.7 %	-74.3 %	-75.2 %	-79.4 %	-79.6 %
Ly Sales R	191,393.03	191,393.03	268,642.58	292,774.51	258,962.66	278,268.33	299,182.74
Wp Sales R var Ly %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %
MT Wp Sales R contrib Prod %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
MT Ly Sales R contrib Prod %	49.9 %	54.7 %	65.9 %	51.6 %	50.0 %	50.0 %	76.3 %
MT Wp Sales R contrib Time %	1.3 %	1.3 %	1.9 %	2.1 %	1.8 %	2.0 %	2.1 %
MT Ly Sales R contrib Time %	1.2 %	1.2 %	1.7 %	1.9 %	1.7 %	1.8 %	1.9 %
Wp Net Sales R	125,816.74	125,874.17	261,619.72	284,152.68	252,096.74	270,605.96	287,434.97
Ly Net Sales R	114,378.85	114,431.06	237,836.11	258,320.62	229,178.85	246,005.42	261,304.52
Wp Net Sales R var Ly %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %
Wp Markdown R	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Markdown R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Ly Markdown R	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ly Markdown R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Figure 19-43 Hover Over the Icon to See the Comments



Calendar	4/1/2023	4/8/2023	4/15/2023	4/22/2023	4/29/2023	5/6/2023	5/13/2023
Measure							
Wp Sales R	210,532.33	210,532.33	295,506.84	322,051.96	284,858.93	306,095.16	329,101.01
Fcst Sales R	832,949.16	833,659.18	1,121,844.63	1,254,639.60	1,146,760.97	1,484,025.19	1,612,280.64
Wp Sales R var Fcst %	-74.7 %	-74.7 %	-73.7 %	-74.3 %	-75.2 %	-79.4 %	-79.6 %
Ly Sales R	191,393.03	191,393.03	268,642.58	292,774.51	258,962.66	278,268.33	299,182.74
Wp Sales R var Ly %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %
MT Wp Sales R contrib Prod %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %
MT Ly Sales R contrib Prod %	49.9 %	54.7 %	65.9 %	51.6 %	50.0 %	50.0 %	76.3 %
MT Wp Sales R contrib Time %	1.3 %	1.3 %	1.9 %	2.1 %	1.8 %	2.0 %	2.1 %
MT Ly Sales R contrib Time %	1.2 %	1.2 %	1.7 %	1.9 %	1.7 %	1.8 %	1.9 %
Wp Net Sales R	125,816.74	125,874.17	261,619.72	284,152.68	252,096.74	270,605.96	287,434.97
Ly Net Sales R	114,378.85	114,431.06	237,836.11	258,320.62	229,178.85	246,005.42	261,304.52
Wp Net Sales R var Ly %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %	10.0 %
Wp Markdown R	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wp Markdown R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Ly Markdown R	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ly Markdown R %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Edit or Delete Comments

You can also edit or delete an existing comment from the view. The edit or delete option is only available when a comment exists in a cell or for a column or row header.

To edit comments, perform follow the steps.

1. Select the cell or a column or row header with comments, and then select **Edit Comment** from the right-click context menu.

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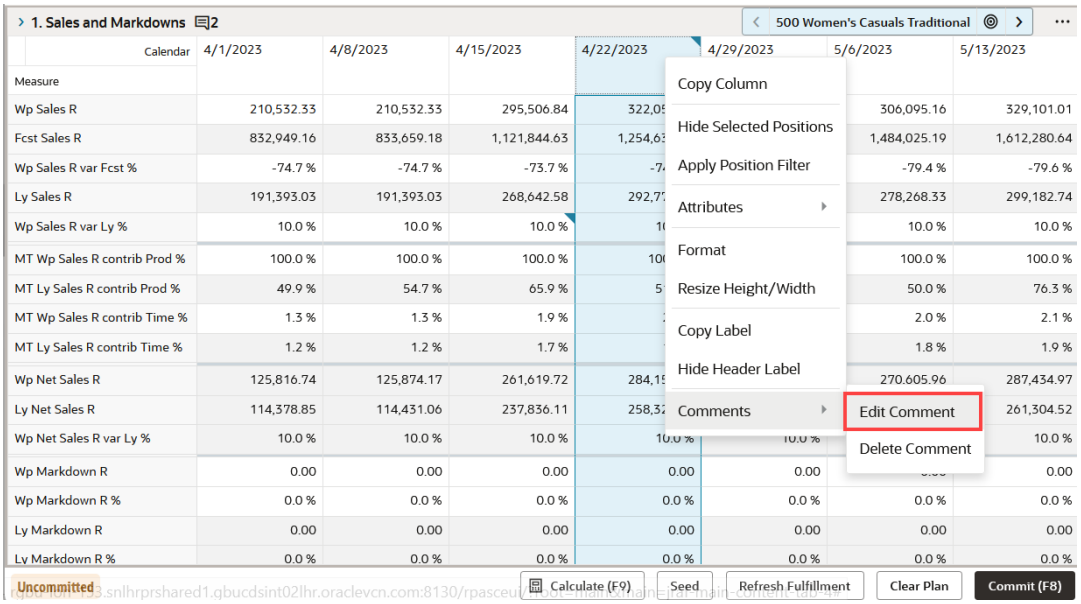
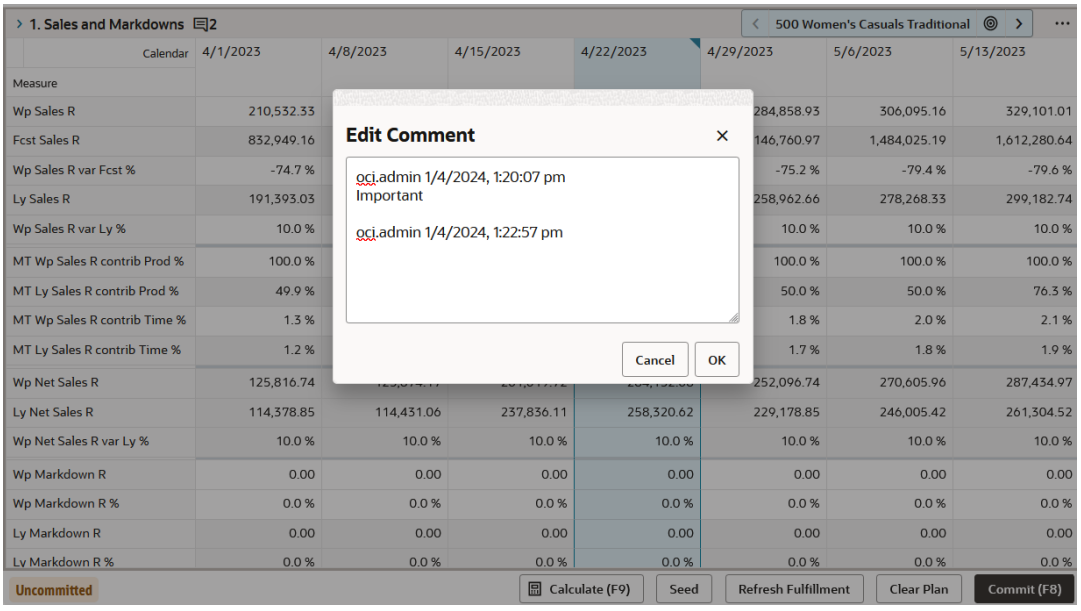
Figure 19-44 Edit Comment



2. When you click **Edit Comment** from the right-click context menu, the Edit Comment dialog box opens populated with the user name and date-time stamp. You can either add a separate note or edit the existing note in the comment dialog box. Click **OK**.

Figure 19-45 Edit Comment Dialog Box



Delete Comment

To delete a comment, select the cell or column or row header with an existing comment and then select **Delete Comment** from the right-click context menu.

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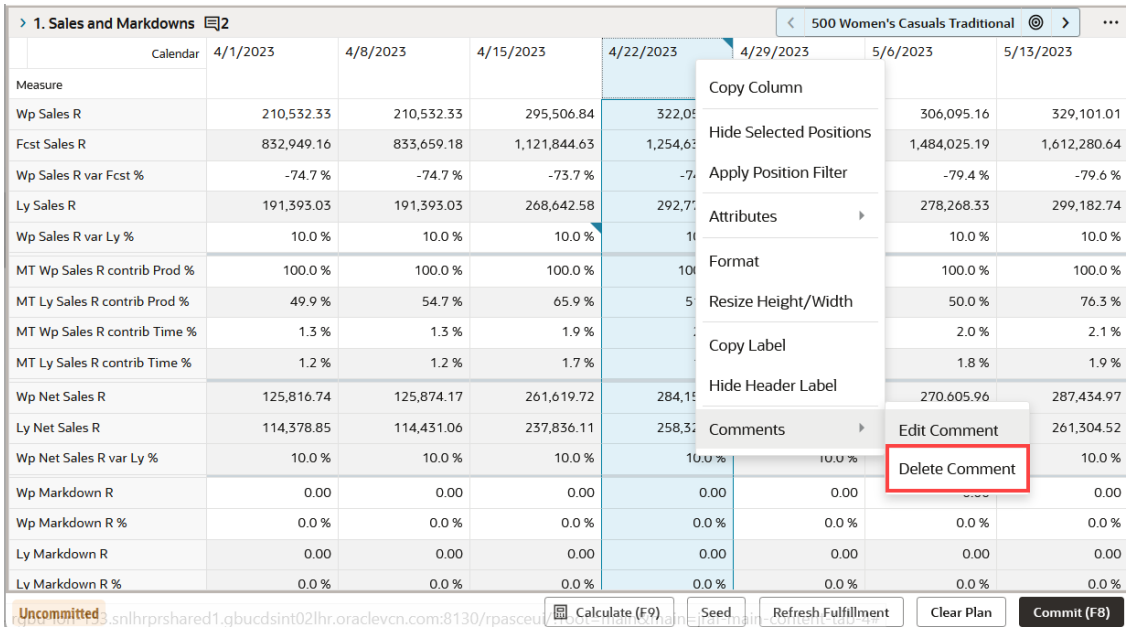
Figure 19-46 Delete Comment



Points to Remember

When using the comments features, remember these conditions:

- When a position or measure with comments is hidden using the Edit view or context menu, then the comments are hidden with the respective position or measure.
- When a position or measure with comments is displayed using the Edit view, then the comments are visible with the respective position or measure.
- When you select multiple cells to add comments, then comments are added to the active cell out of the selection.
- The comments are shared when the workspace is shared with another user. The recipient user can add, edit, or delete comments on the shared workspace.
- The comments are deleted when a segment or workspace is deleted. When a workspace is created using an existing segment, the comments are not inherited from segment.
- You can add total 4000 characters for all comments which are made on a single intersection. This includes multiple comment lines added by different users.

Count of the Comments

The count of the comments in the view is visible on the view header and view tile on the View Management drawer. The count is visible with an icon along with the total number of comments. When you hover over the icon, it displays this message: This view has [n] comments.

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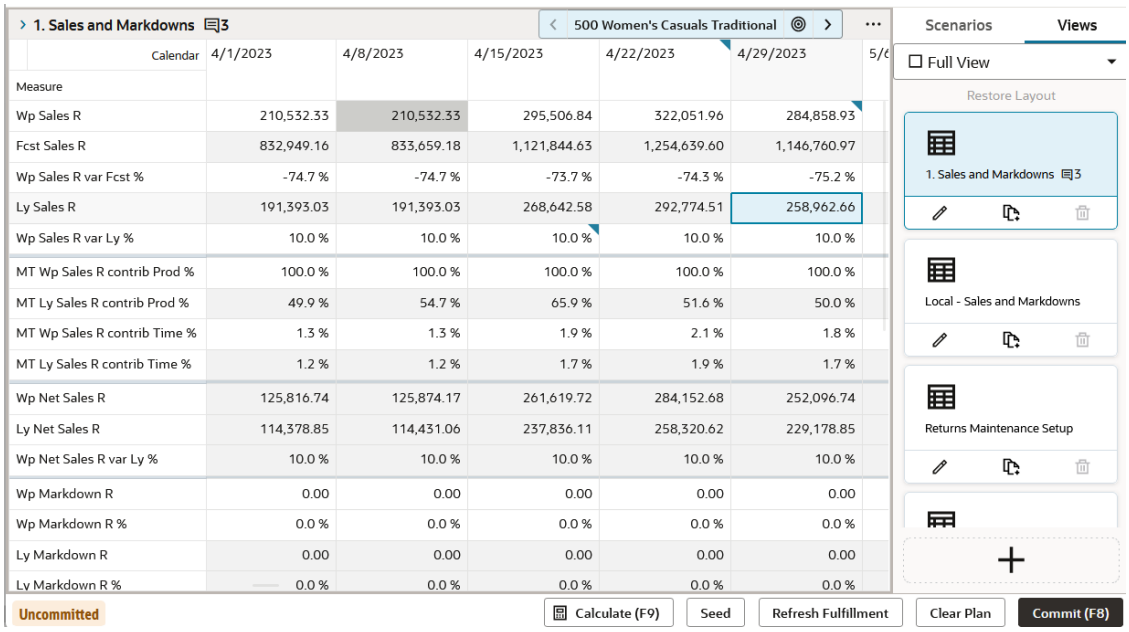
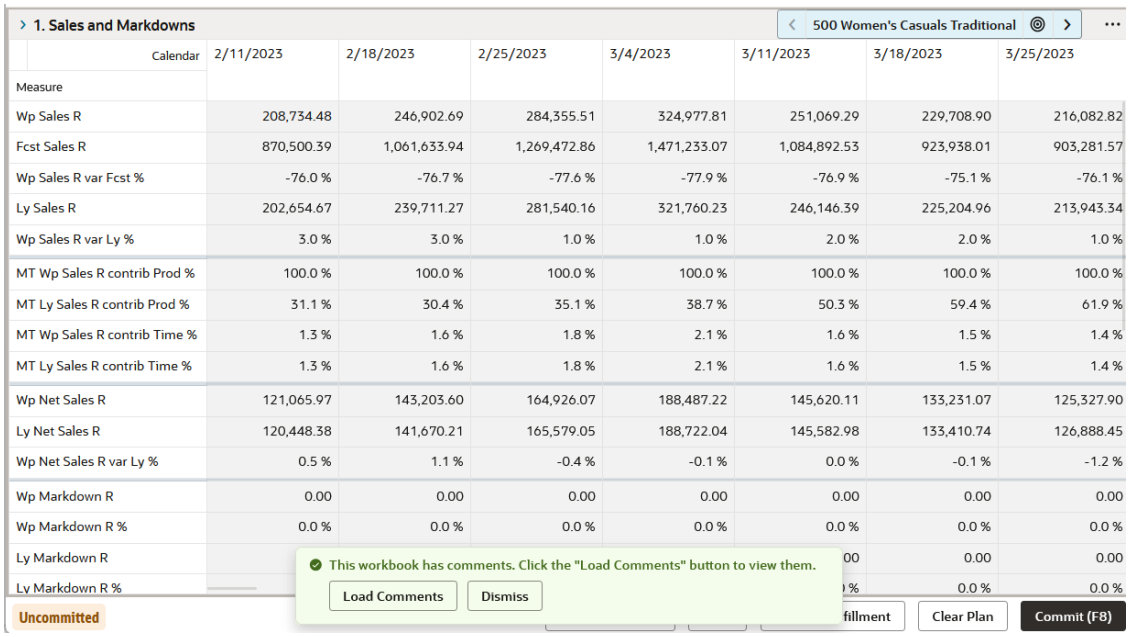
Figure 19-47 Count of the Comments



Load Comments in the Workspace

When a workspace with existing comments is opened, the comments are not visible as they are not loaded automatically. When workspace is opened, you receive a notification with the **Load Comments** button. Click **Load Comments** to view the comments in workspace.

Figure 19-48 Load Comments Notification



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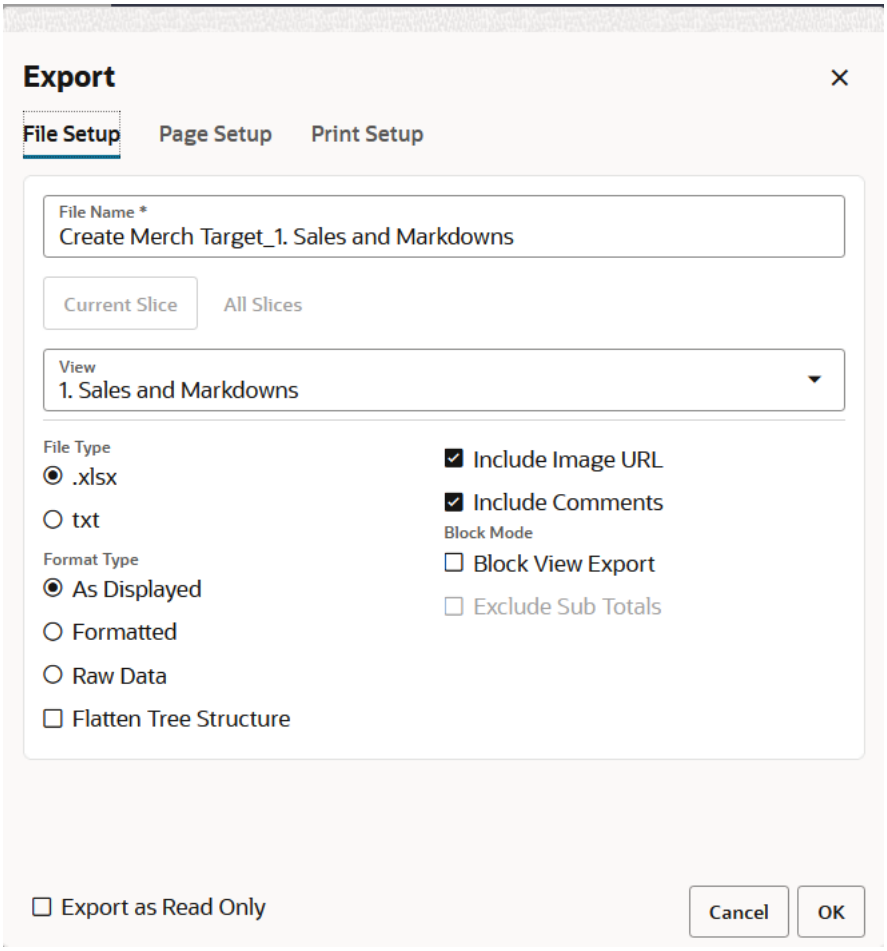
Export Comments

You can export comments from workspace view using the Export to Excel functionality. You can select **Include Comments** from the export dialog box to export the comments into Excel for the current view.

Figure 19-49 Export – Include Comments



Drag and Drop Measure Columns or Rows

You can shuffle the measure columns or rows in real time by a simple hold and then drag and drop action on the pivot table. This feature allows you to change the sequence of measure on pivot table without navigating to the Edit view every time you need to rearrange the placement of measures. You can also move the measure column or row using the context menu options:

- Cut Measures
- Insert Measures After
- Insert Measures Before

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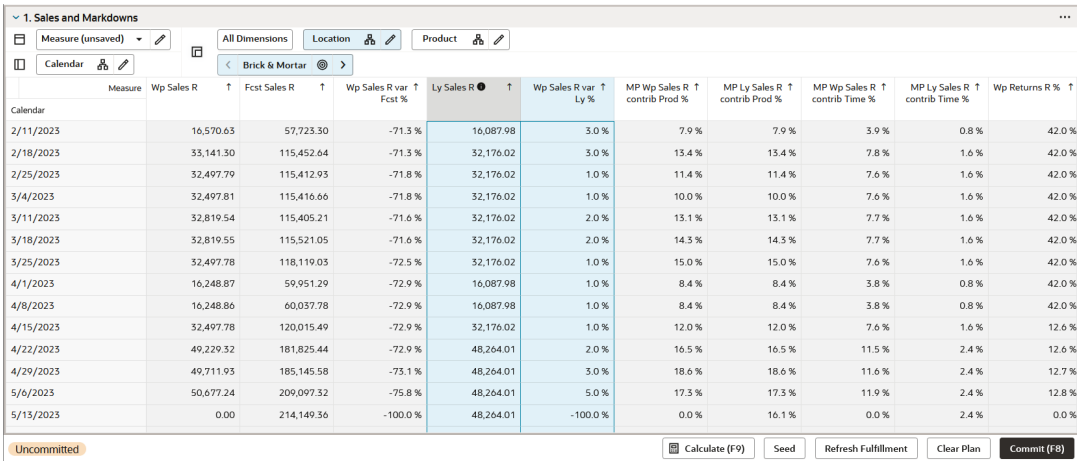
Move the Measure Columns or Rows by Using Drag And Drop

Perform the following steps to move the measure columns or rows by using the drag and drop action.

1. Select single or multiple measure columns or rows by using your mouse or the **Ctrl** key. The cursor changes to a hand icon as you hover over the selected column or row header.

   As shown in the following image, the two measure columns **LY Sales R** and **WP Sales R vs LY%** are selected.

Figure 19-50 Select the Measure Columns or Rows



2. With your mouse, hold the selected columns or rows header, then drag it to the left or right and then drop it before or after any measure on the pivot table. While moving the selected measure column or row, a blue guideline is visible to assist in placing the measure column or row.

Figure 19-51 Drag the Measure Column across the Pivot Table

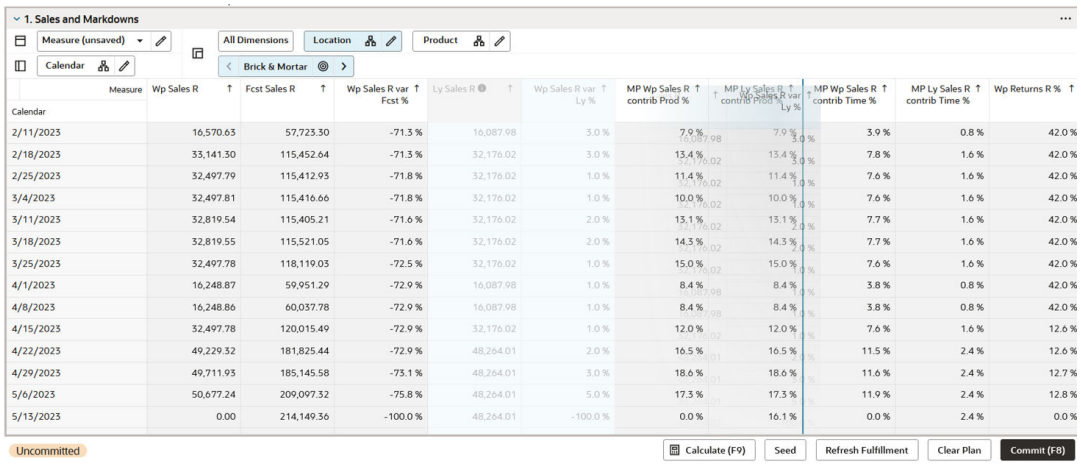


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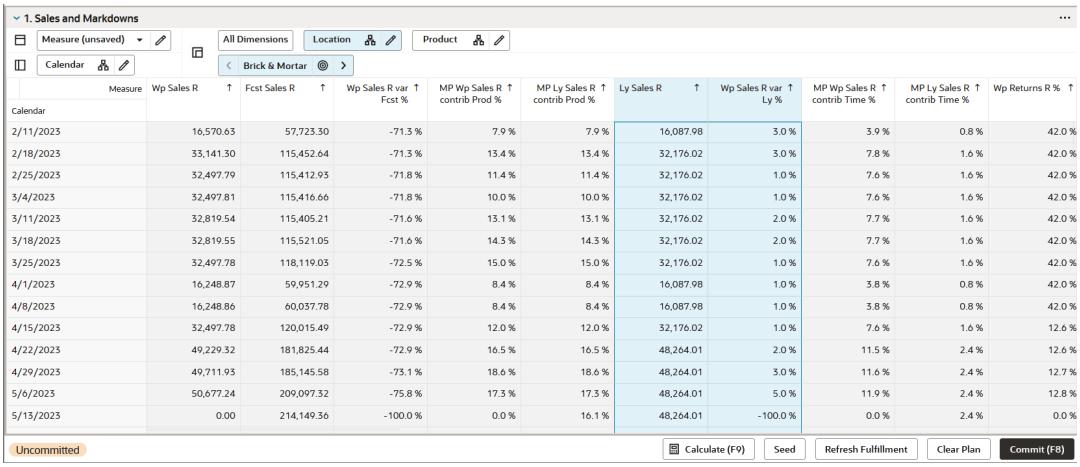
Figure 19-52 Drop the Measure at the New Location

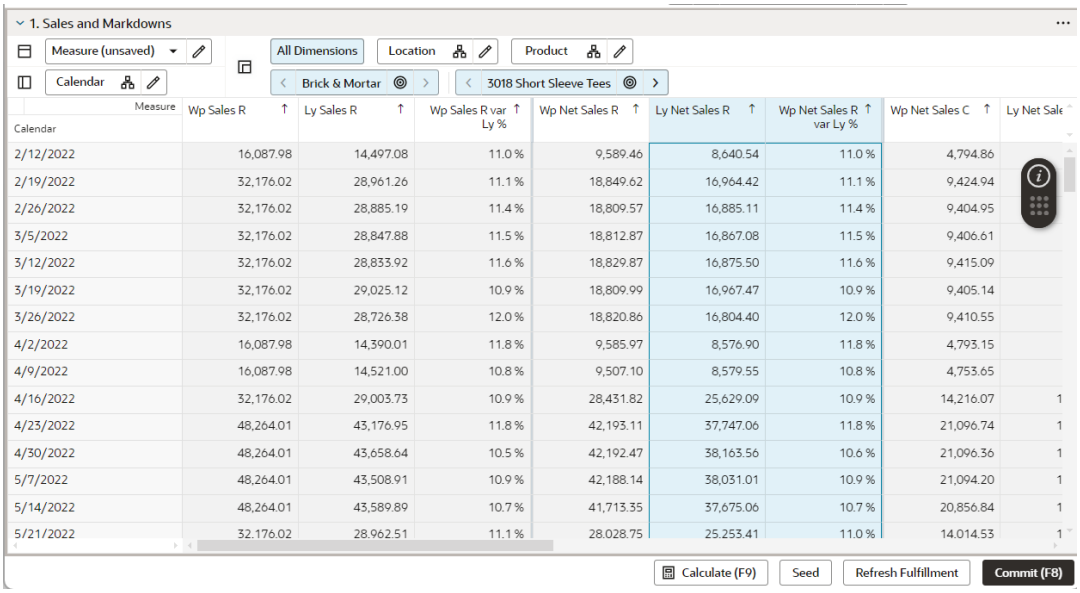


Move the Measure Columns or Rows by Using the Context Menu

Perform the following steps to move the measure columns or rows by using the context menu.

1. Select single or multiple measure columns or rows by using your mouse or the **Ctrl** key.

Figure 19-53 Select the Measure Column or Row



2. Right-click on the selected measure columns and from the context menu, select **Measures** and then **Cut Measure**.

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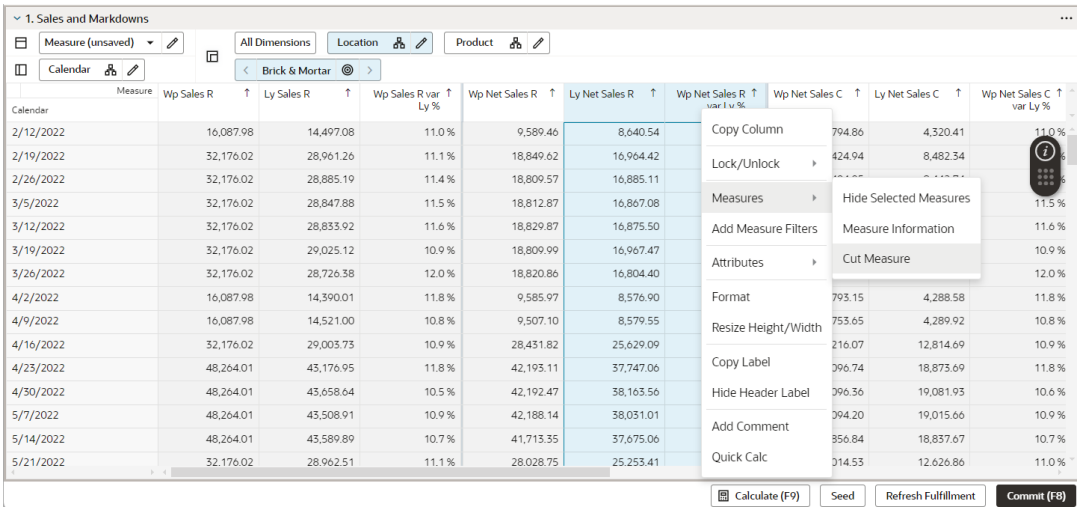
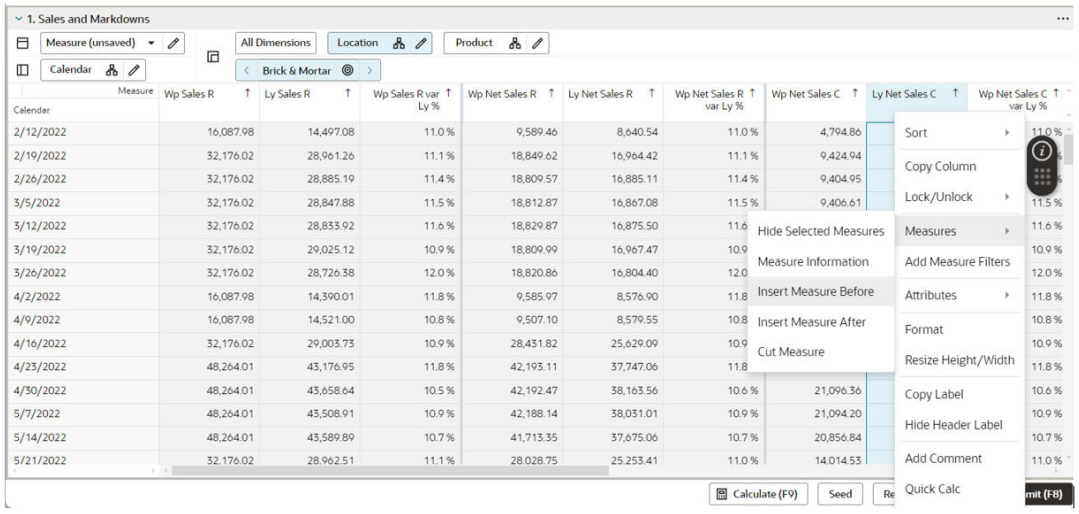
Figure 19-54 Select the Cut Measure Context Menu Option



3. Select the measure that is located next to destination where you want to place the selected measures columns. Then right-click and from the context menu, select the option, **Insert Measure Before**.

Figure 19-55 Select the Option, Insert Measure Before



Points to Remember

- You can select multiple contiguous or non-contiguous measure columns or rows to change the sequence on pivot table. For more details about selecting measure column or row refer to the section, Selecting Rows and Columns.
- When you select non-contiguous measure columns or rows and then move them together, the result after placing them on the destination position is arranged in contiguous order.
- When you drag the selected measures, you can scroll to far right or far left of pivot table by hovering over the pivot table cells.
- To place the selected measure in destination position, you should place the cursor on the measure header and not at the pivot table cells. If you place the cursor on the pivot table cells, they are highlighted with an error icon and you will not be able to place the measure. as shown in the following image, the cursor is on the pivot table cells and the error icon displays.

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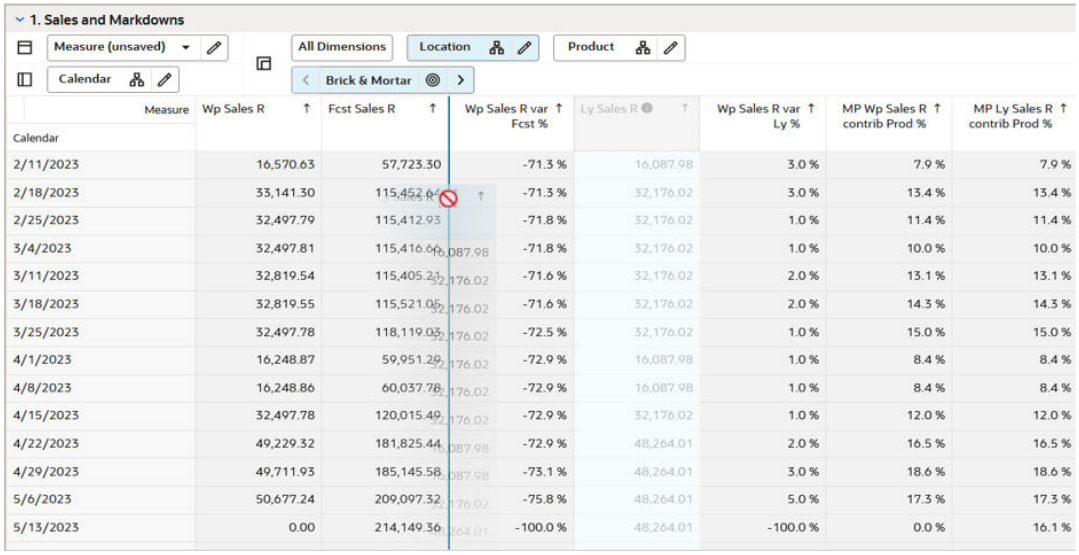
Figure 19-56 Error Icon When Hovering Over the Pivot Table Cells



- When you change the placement of the measure on pivot table, then the Edit view reflects the same changed arrangement of selected measures. To save the updated measure placement, you can save the measure profile.
- When there are multiple dimensions on one axis along with the measure dimension, then you can drag and drop measures only when the measure is at its inner most dimension.

Quick Calculations on the Pivot Table

The Quick Calculation (Quick Calc) feature allows you to select a number of cells or columns or rows and then view the calculated results of simple math operations like sum, average, and so on . This feature assists you in making quick decisions since you can view quick sub-totals for the selected cells. You also check the calculations for filtered positions. For example, if you have stores filters with a 10% markdown and you want to check the average volume across the filtered stores, then you can use Quick Calc feature and view the results.

Using Quick Calc

Perform the following steps to use Quick Calc.

1. Using your mouse or keyboard controls, select the number of cells or rows header or columns header for which you need to check calculations.

   You can select contiguous or non-contiguous cells or row or column header.

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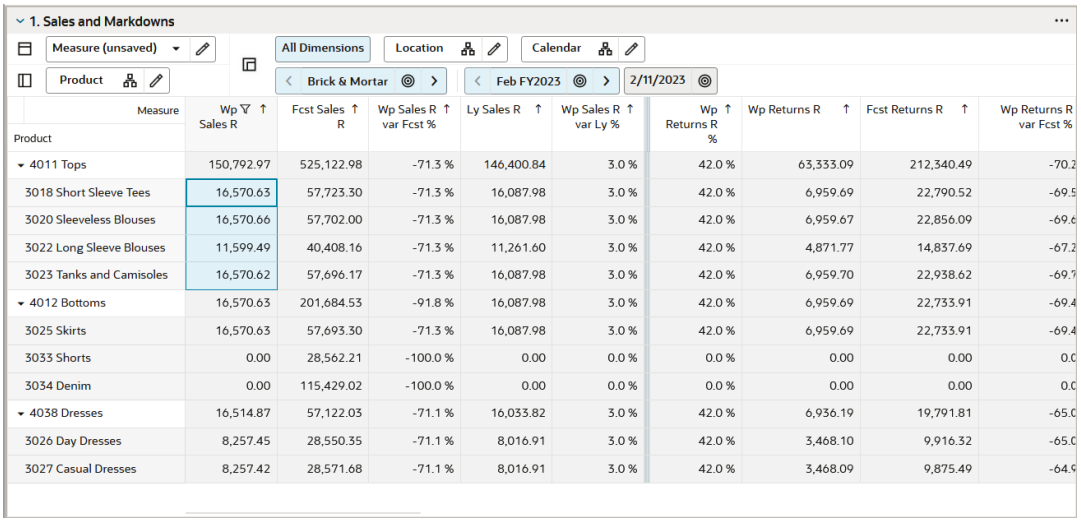
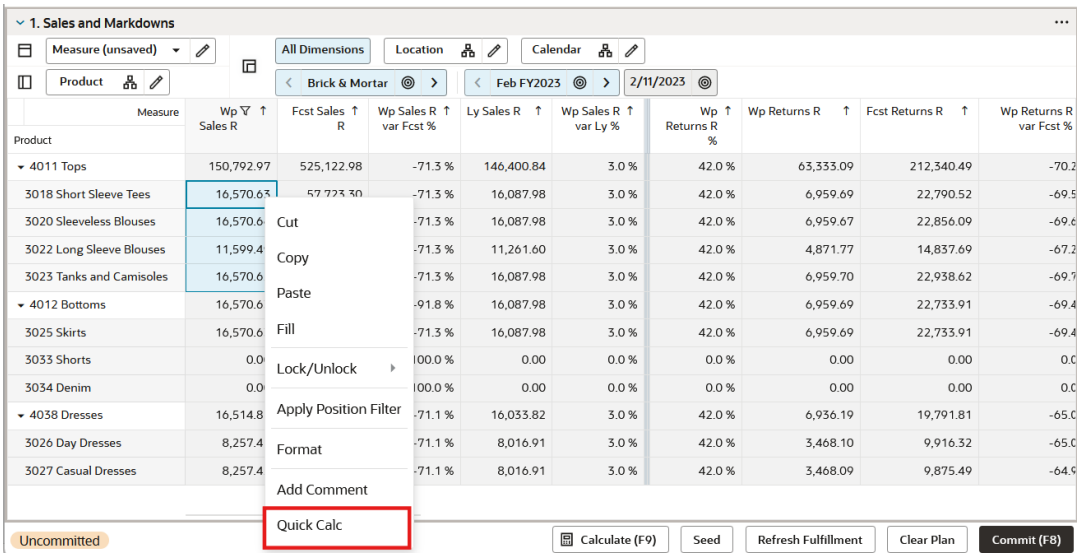
Figure 19-57 Select Cells



2. With the selected cells, rows, or columns, right-click and select **Quick Calc** from the context menu. You can also use keyboard shortcut **Alt+Q** for the Quick Calc action.

Figure 19-58 Context Menu Quick Calc Option



3. The Quick Calc results appear on the right-hand side panel

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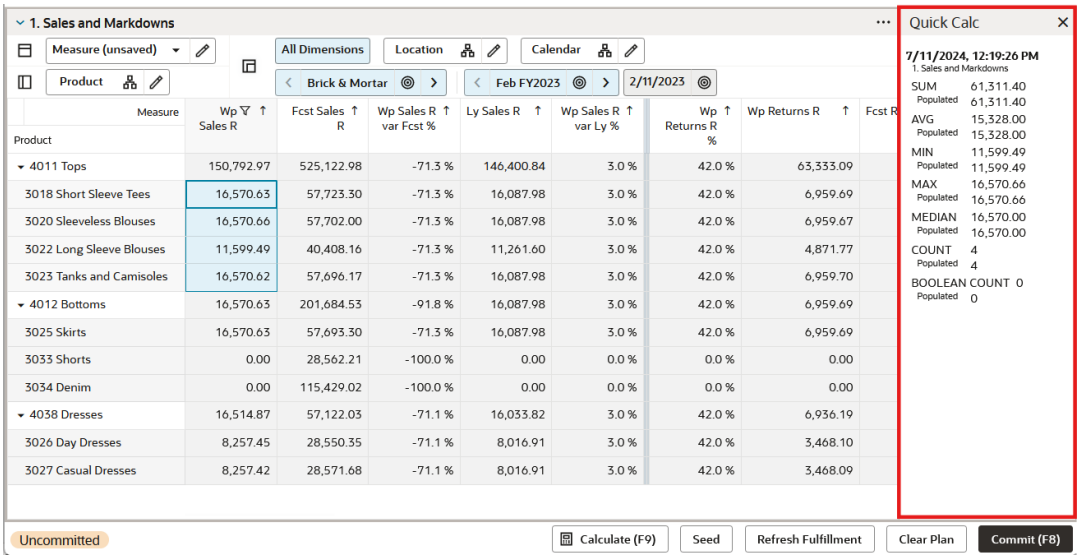
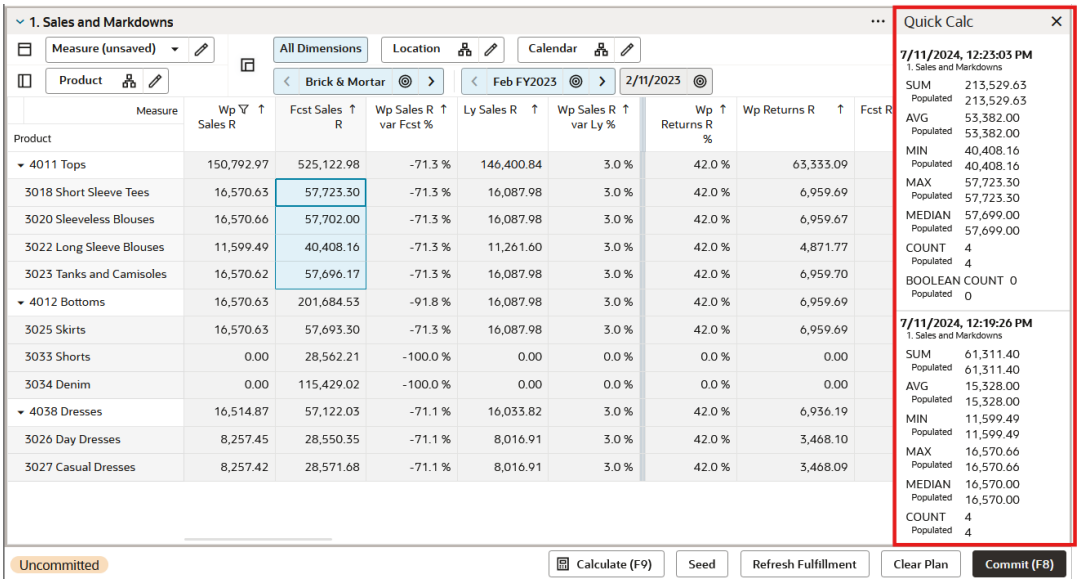
Figure 19-59 Quick Calc Results Panel



Note

The panel displays results of the last two calculations with the latest calculation result present at the top of the panel. If you click **X** and close the panel, the results are lost.

Figure 19-60 Quick Calc – Last Two Results



About Quick Calc Results

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> **Note**
>
> The Quick Calc results are not consistent when workbook is closed and re-opened again. It is only consistent within the workbook session until the Quick Calc panel is closed.

- The results are displayed with two decimal points by default, when only one measure type is selected. With multiple measure type, the results are presented with no decimal points.
- When a single measure data type is selected, the results are presented with same prefix or suffix symbols as the selected measure. Examples of prefix or suffix symbols include $ or %. With multiple measure types, the results will not have any prefix or suffix.
- The results panel has the heading of the date and time when the calculation performed and the View name where the data is located.
- The results panel provides the calculations using following operators:

Table 19-3 Quic Calc Operators

Operator	Description	Remarks	Data Type
SUM	Numeric addition of all the selected cells.	Including displayed NA/SP values	Numeric
SUM populated	Numeric addition of all the selected cells	Excluding displayed NA/SP values	Numeric
AVERAGE	Numeric average of the selected cells	Including displayed NA/SP values	Numeric
AVERAGE populated	Numeric average of the selected cells	Excluding displayed NA/SP values	Numeric
MIN	Minimum of the values of selected cells	Including displayed NA/SP values	Numeric
MIN populated	Minimum of the values of selected cells	Excluding displayed NA/SP values	Numeric
MAX	Maximum of values of selected cells	Including displayed NA/SP values	Numeric
MAX populated	Maximum of values of selected cells	Excluding displayed NA/SP values	Numeric
MEDIAN	Median value of selected cells	Including displayed NA/SP values	Numeric
MEDIAN populated	Median value of selected cells	Excluding displayed NA/SP values	Numeric
COUNT	Counting number of cells	Including displayed NA/SP values	Date, String, Boolean, Numeric, Picklist
COUNT populated	Counting number of cells	Excluding displayed NA/SP values	Numeric data type only

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Table 19-3 (Cont.) Quic Calc Operators

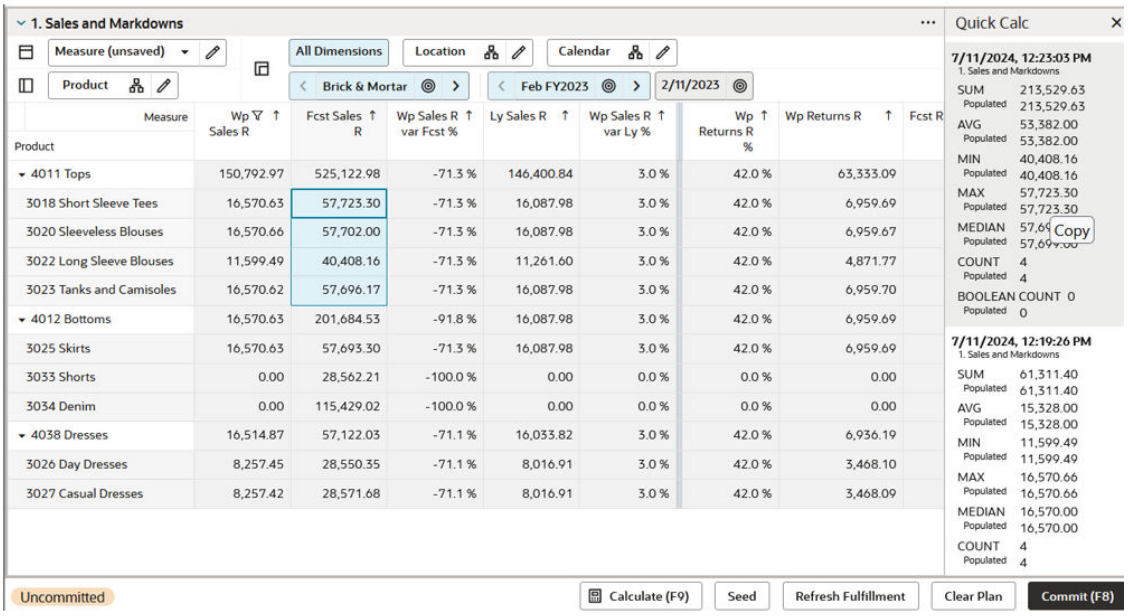
Operator	Description	Remarks	Data Type
BOOLEAN COUNT	Count of number of selected Boolean cell with TRUE value Sum	Including displayed NA/SP values	Boolean
BOOLEAN COUNT populated	Count of number of selected Boolean cell with TRUE value Sum	Excluding displayed NA/SP values	Boolean

Copy and Paste Quick Calc Results

You can copy the results of Quick Calc and paste them to external applications like Microsoft Excel or Notepad. This assists you in keeping notes for reference or any further analysis.

To copy the Quick Calc results, hover over the results using your mouse. The cursor changes to a hand. Click the result to copy the results to the clipboard. When you copy the result, the selection has a blue colored background and when successful, you receive a *Copy* notification as shown in the following image. To paste the copied values to an external application, use **Ctrl+V**.

Figure 19-61 Copy Quick Calc Results



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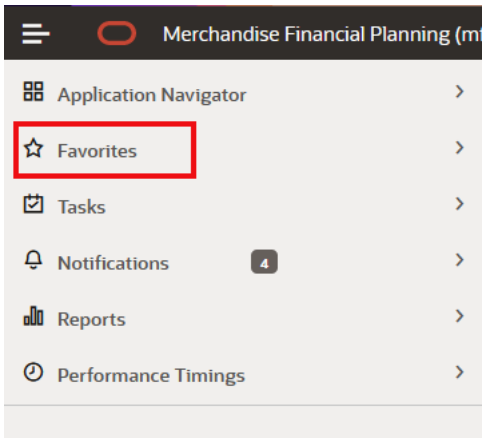
20

Favorites

The Favorites option provides you the ability to bookmark the templates that are often used. It provides quick and easy access to frequently used workflows. These bookmarks save you navigation time through the task list and allows you to access the commonly used templates quickly. The following figure shows where the Favorites menu is accessed using the star icon.

Figure 20-1 Favorites Menu



Add Favorites

By clicking the star icon next to a task name, you can add a task to the Favorites list. A full star next to a task name indicates that it is a Favorite. The icon is visible only when you hover over on the task. New favorites are always added to the end of the list and they can be reordered in the Edit Favorites page. Additionally, you can pin the selected task from the list of Favorites to easily access them from the navigation bar.

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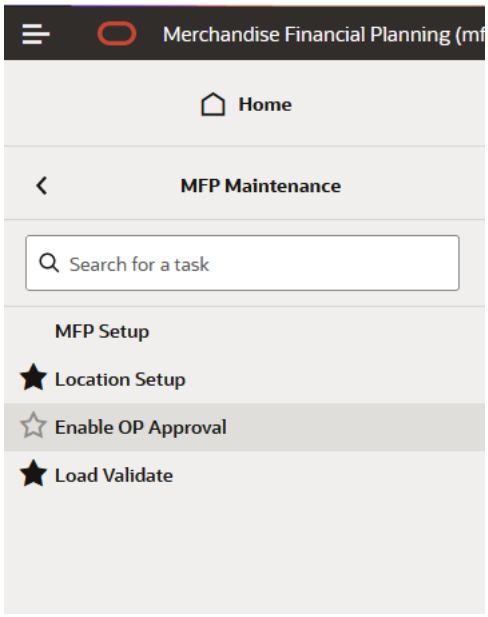
Figure 20-2 Add Favorites



Remove Favorites

By clicking the star icon next to a task name, you can remove a task from the Favorites list. An empty star next to a task name indicates that it is not a Favorite. The icon is visible only when you hover over on the task.

Pin Favorites

By clicking the pin icon in the Favorites menu, a favorite task can be pinned to the navigation bar. A full pin next to a task name indicates that it is pinned. To unpin a task, click the pin icon again to display an empty pin icon. Pinned favorites can also be managed from the Edit Favorites page. You can unpin any favorites by clicking the pin icon again or from the Edit Favorites page.

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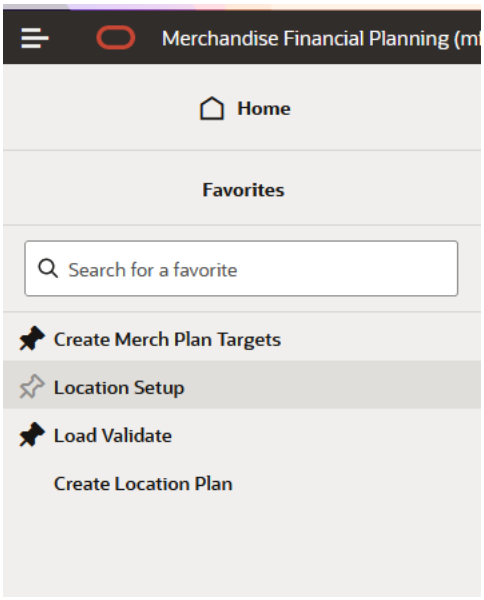
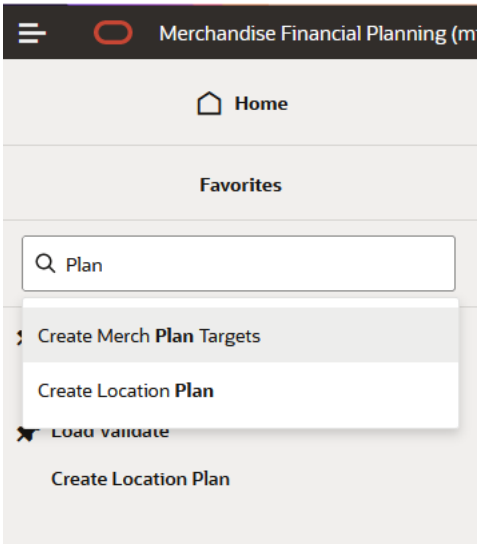
Figure 20-3 Pin Favorites



Search Favorites

You can also search the bookmarked tasks in the Favorite menu by using search option. Start typing in the search input to find the matching favorite task and then select a favorite from the search result to open that task.

Figure 20-4 Search Favorites



Favorites Folders

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Favorites can be organized into folders for better organization. You can create folders for favorites in edit favorite window. You can choose to display the folders which has nested favorites in either Group view or List view. Group view allow you access the folder whereas List view allow you to show all favorite content in flat list.

Figure 20-5 Example of Favorite Folder

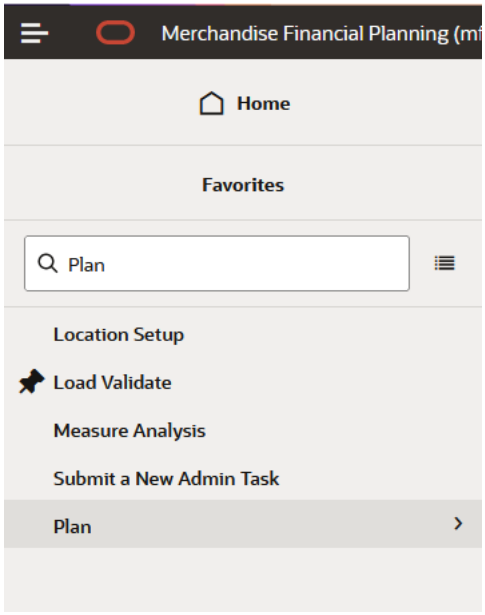

Figure 20-6 Favorite Group View Example

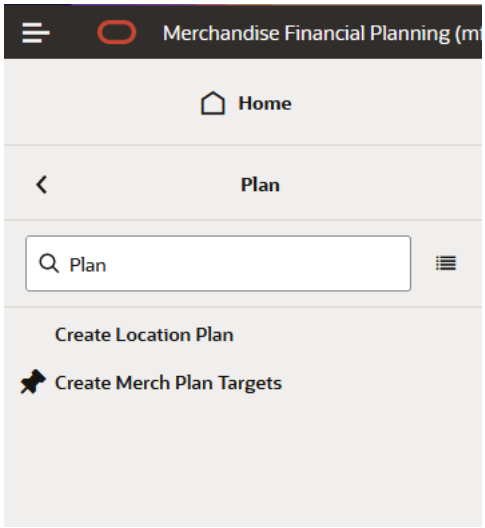

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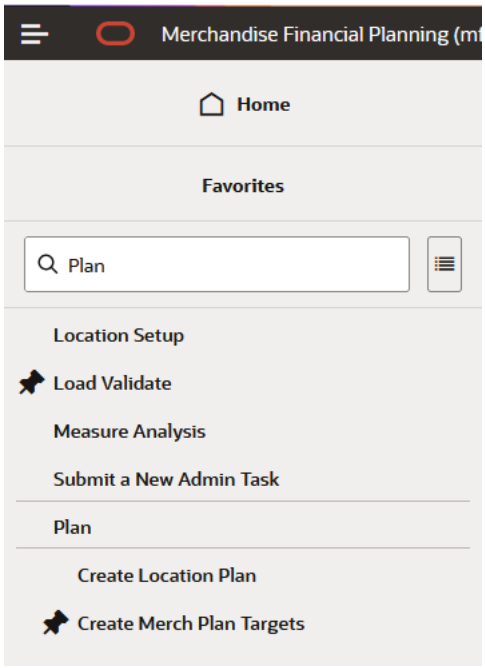
Figure 20-7 Favorite List View Example



Edit Favorite Window

You can organize, re-name, pin and unpin the Favorites from the Edit Favorites window. Click **Edit Favorites** at the footer of the Favorites menu to open the Edit Favorites window.

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Figure 20-8 Edit Favorites

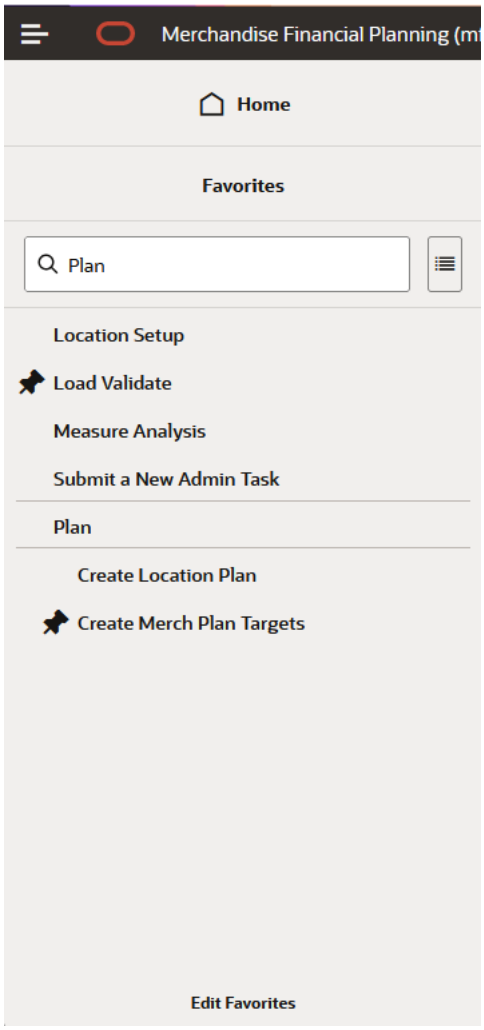

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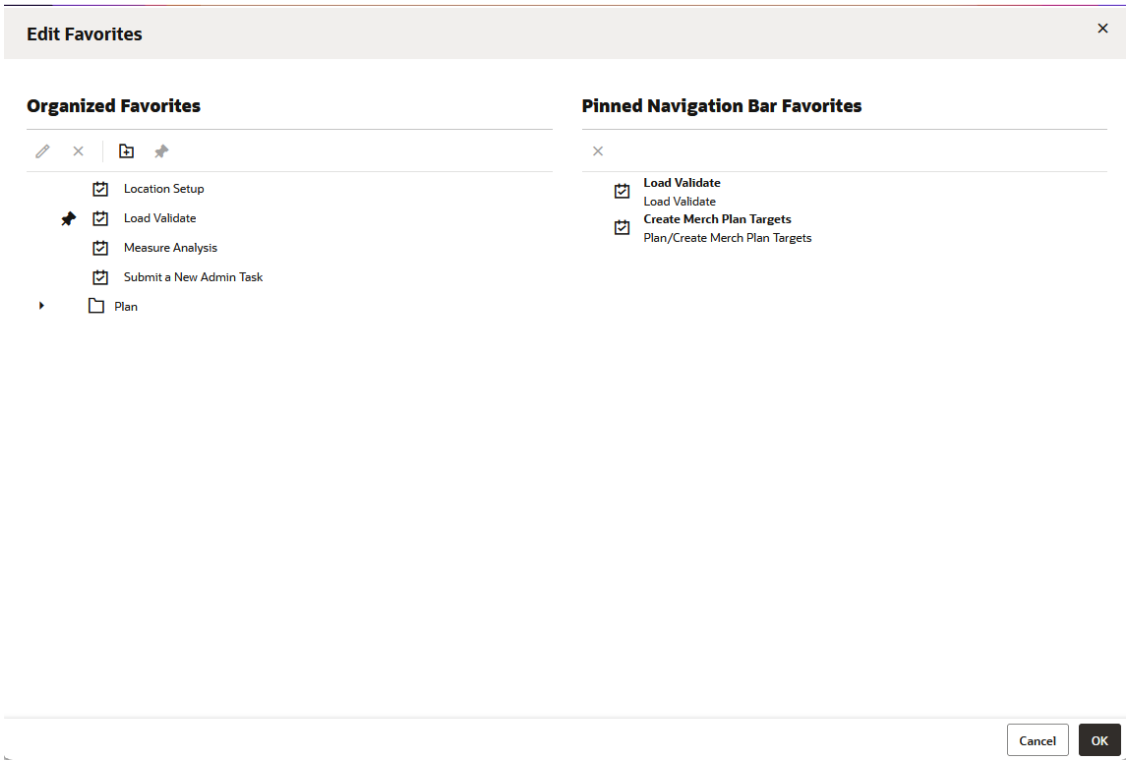
Figure 20-9 Edit Favorite Window



Create Folder

You can create folders for organizing your favorite options. From the toolbar on the Edit Favorites window, click the Create Folder icon to add new folder. Enter a name for the folder and click OK to complete.

Figure 20-10 Create Folder

Edit a Favorite or Folder

To edit the Favorite or folder, select the favorite or folder to edit and either:

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- From the toolbar on the Edit Favorites window, click the Edit icon
- Use the context menu option

Enter a custom name and click **OK** to complete.

Delete a Favorite or Folder

To delete the Favorite or folder, select the favorite or folder to delete and either:

- From the toolbar on the Edit Favorites window, click the delete icon
- Use the context menu option

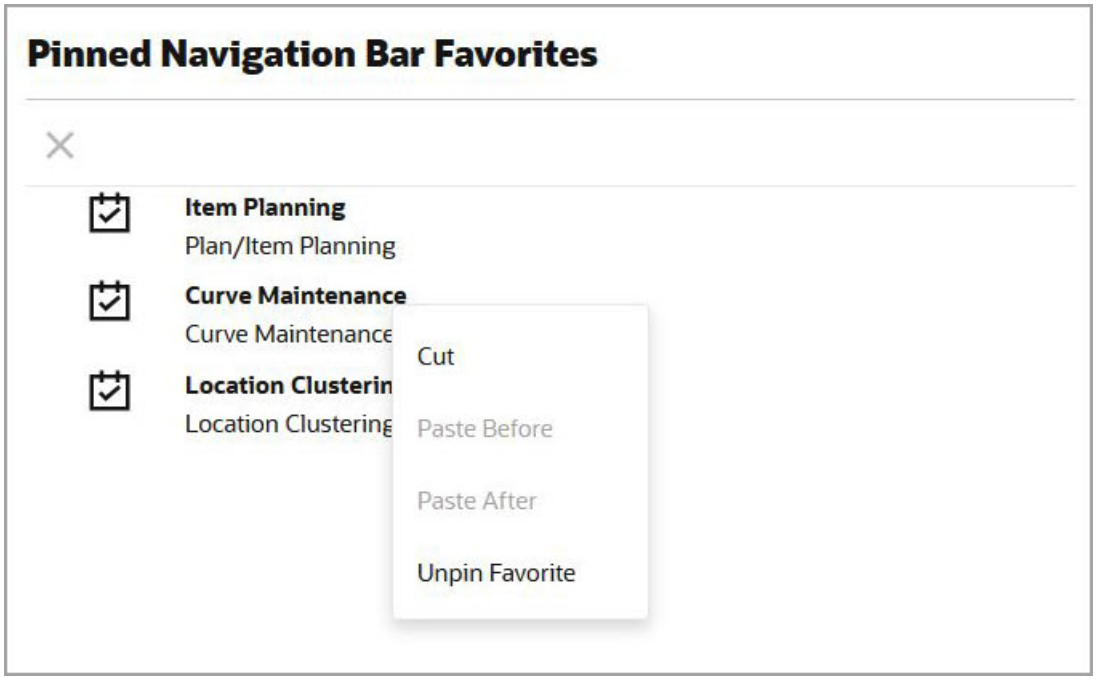
Organize Favorites

Organize your favorites in the Edit Favorites window. Select the folder or favorite and drag it up or down to a new position. You can also drag and drop favorites inside any folder.

Pinned Navigation Bar Favorites

Use the Pinned Navigation Bar Favorites panel in the Edit favorite window to reorder and remove pinned favorites Select and drag pinned favorites to change the order. Select pinned favorites and click the delete icon on the toolbar to remove them. All operations are also available from the context menu available when right-clicking an item.

Figure 20-11 Pinned Navigation Bar Favorite



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21

Manage Workspaces

Workspace management has been streamlined by providing a single view of all the workspaces. This module also allows all users (Administrator and non-administrator) to view each workspace in a centralized space. With manage storage functionality, you can view the information on the space consumption within the application, and you can take necessary actions to clear any unwanted workspace or files. You can periodically check the space consumption and take actions. It offers view size of each workspace, create date, time and so on for each workspace. You can access the Manage Workspace window from the button available on the top of Recent plan list. Figure 21-1 shows how the Manage Workspace is accessed from the Recent Plans list.

Figure 21-1 Manage Plans Button in the Recent Plans List

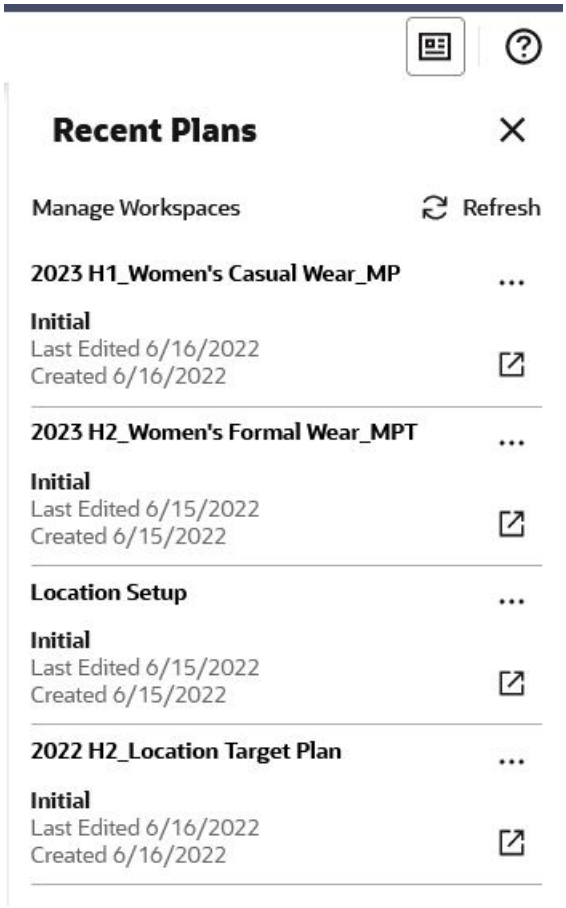

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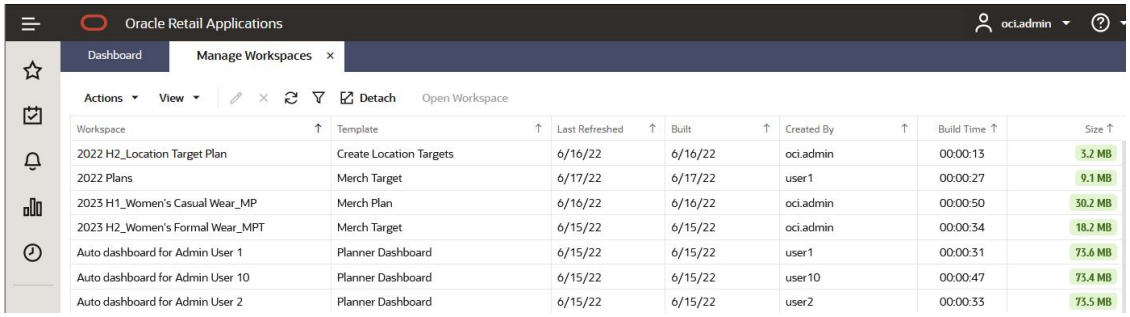
Figure 21-2 Manage Workspace Window



Manage Workspaces Table

Manage Workspaces can be accessed by all users. Administrators have visibility to all workspaces in the environment and each individual user is able to see all the workspaces they created. The table displays the following fields:

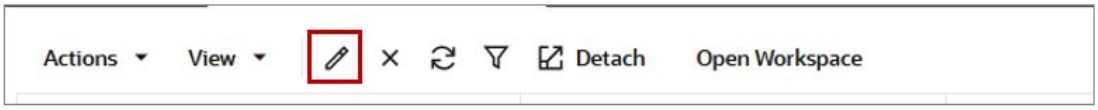
- Workspace: Name of the workspace
- Template: Name of the template
- Last Refreshed Date & Time: Displays the last time workspace was refreshed
- Built Date: Displays workspace build date
- Created By: Displays the name of user who create the workspace
- Build Time: Displays the workspace build time
- Shared with: Displays the list of users with whom the workspace is shared with.
- Size: Displays the size of the workspace

This table helps you to manage the workspaces in one place and better utilize your disk space.

Edit Workspace

You can edit the workspace from the Manage Workspaces window directly. Select the workspace which needs to be edited and click **Edit**. The respective wizard window opens for you to make selections of the positions. You can also access **Edit** from the **Actions** list.

Figure 21-3 Edit Workspace Icon



Delete Workspaces

You can delete your workspace from the Manage Workspaces window. Select one or more workspace from list and click **Delete**. You can delete more than one workspace from the list at a time. You can also access **Delete** from the **Actions** list. If you try to delete a workspace that is already open, you will see a message to first close the workspace and then delete.

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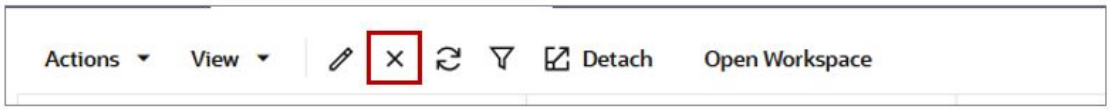
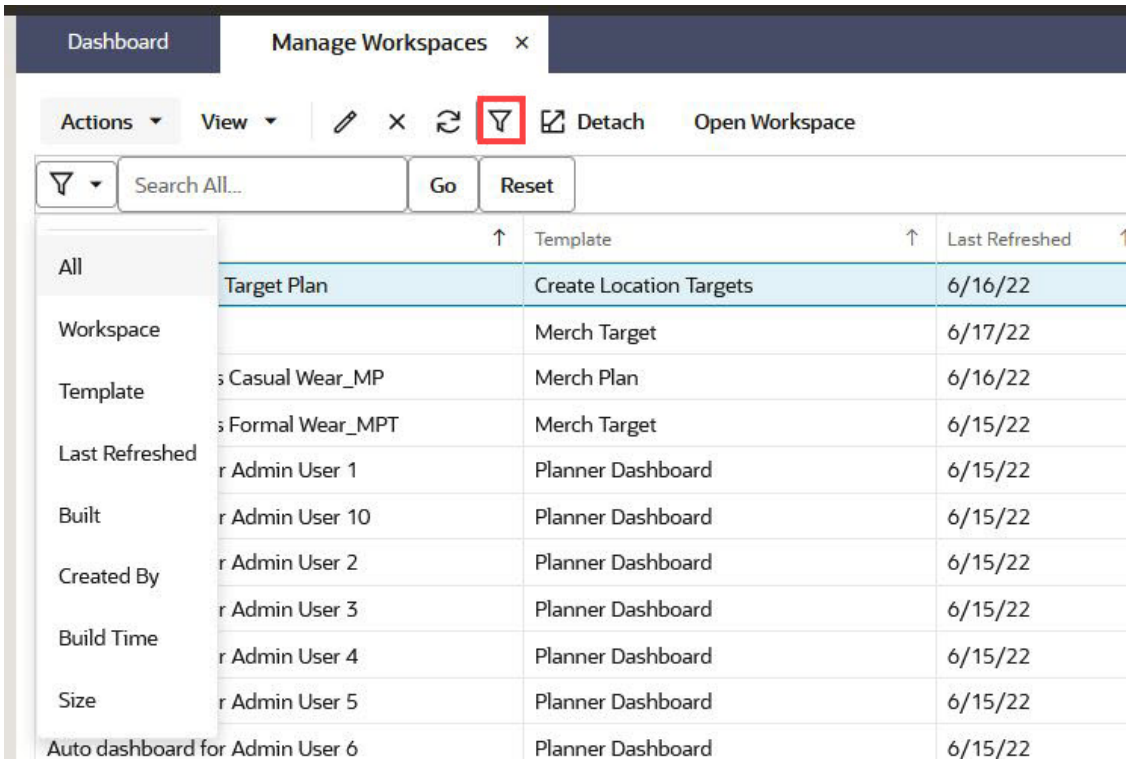
Figure 21-4 Delete Workspaces



Filter Manage Workspaces

You can filter the Manage Workspaces table by using the filter option available on the tool bar. The filter option allows you to filter on any one of the columns as needed. From the toolbar, click **Filter** (funnel icon) to open the Search options. Use the drop-down list to select the column to apply the filter to. The format for the search keyword changes depending on the chosen column type. Click **Reset** to display all the workspaces again.

Figure 21-5 Using Filter on the Manage Workspaces Table



Download Manage Workspace Table

To download the manage workspace table, click the Download option from the tool bar. The table is exported to an Excel spreadsheet. The download option exports the table columns as displayed. When a filter is applied to table, the download option only exports results to Excel. The download option is also available under the Action drop-down menu.

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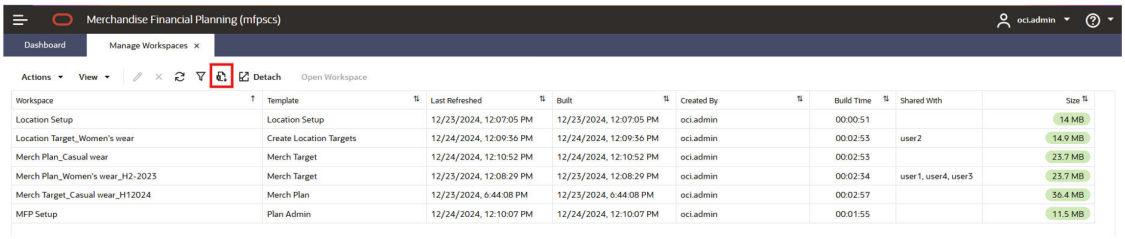
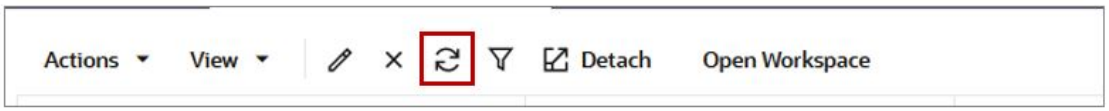
Figure 21-6 Download Manage Workspace Table



Refresh Manage Workspaces

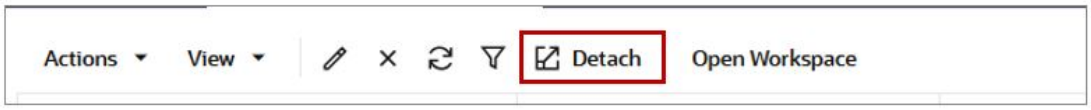
To refresh the Manage Workspaces table, click **Refresh** from the toolbar.

Figure 21-7 Refresh Manage Workspace Table



Detach Manage Workspaces

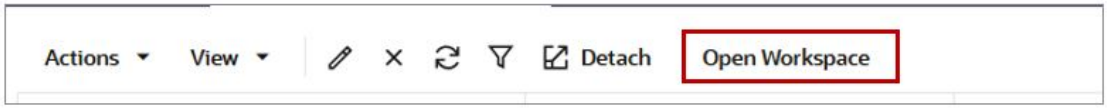
To detach the Manage Workspaces table, click **Detach** from the toolbar.



Open Workspace

You can open any workspace from the Manage Workspaces table by selecting the workspace and then clicking **Open Workspace** from the toolbar.

Figure 21-8 Open Workspace



Manage Columns

You can manage the columns of the Manage Workspaces table by using the **Manage Columns** options. Access the **Manage Columns** options from the **View** list. You may choose to:

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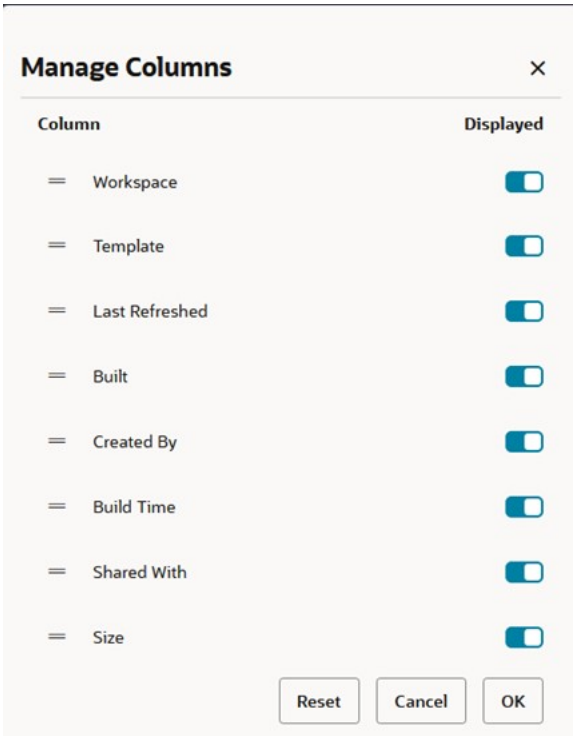
- Select which columns display or are hidden
- Change the order of the columns displayed in the table

Use the toggle button next to the column name to show or hide that column. Reorder the columns by dragging them either up or down in the list. To revert to the default settings, click **Reset**.

Figure 21-9 Manage Columns



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A

Restricted Access Modes

This appendix provides information about restricted access modes.

You may encounter some restricted access modes that were set using the online admin wizards.

The purpose of the restricted access modes is to support backend operations that require limited user interaction with the RPASCE data store (domains and workbooks).

When submitting a job, there are two modes of restricted access that can become active from the Online Admin Tool:

- **Offline**: Highly restrictive
- **Domain Exclusive**: Moderately restrictive

For a list of the offline and domain exclusive online administration tasks that can trigger this behavior, refer to the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Table A-1 outlines the behavior that you would see during the restricted access modes.

Table A-1 Restricted Access Modes

Status	Domain Exclusive	Offline
Login	Allowed for all users including non-admin	• Allowed for Admin only • Non-admin users receive a prescribed message (specified in OAT) if they try to login
User is already logged in	• All users stay logged in • User sessions continue with restrictions • Submitted commits finish to completion	• Non-admin users are logged out after being presented an error message • Submitted commits finish to completion • The admin user is allowed to stay logged in. Access is limited to the admin dashboard • If the admin attempts any other function, RPASCE sends feedback
Allowed online operations	Operations that do not require domain interaction. Examples include edits, calculations, and workbook close.	Allow access to OAT dashboard.

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B

Keyboard Shortcuts

This appendix provides supported RPASCE and RPASCE applications keyboard shortcuts that provide compatibility with assistive technology.

User Interface Keyboard Shortcuts

Table B-1 lists the UI keyboard shortcuts for RPASCE and RPASCE applications.

Table B-1 UI Keyboard Shortcuts

User Interface Component	Keyboard Shortcut	Action
Window (also known as a pop-up window or dialog box)	Tab or Shift+Tab	Navigates the contents of the window. Closes the open window if there are no tab stops in the window.
	F6	Moves the focus to the launcher for a window with modeless modality. Closes the open window if the modality is modal.
	Esc	Closes the open window.
List or Tab	Enter or Space	Selects the list item.
	Up Arrow	Moves the focus to the previous visible list item.
	Down Arrow	Moves the focus to the next visible list item
	Right Arrow (left arrow in Right-To-Left text orientation)	For a horizontal tab bar, the focus moves to next visible item.
	Left Arrow (right arrow in Right-To-Left text orientation)	For a horizontal tab bar, the focus moves to the previous visible item.
	Home	Moves the focus to the first visible list item.
	End	Moves the focus to the last visible list item.
	F2	If the focus is on a list item, pressing F2 makes its contents accessible using Tab.
	Esc	When F2 mode is enabled, press Esc to exit F2 mode.
	Ctrl+x	Marks the current item to move if reorderable is enabled.
	Ctrl+v	Pastes the items that are marked to directly before the current item.
	Delete	Deletes the current item.
Button	Enter or Space	Pushes the button.
	Enter or Space	Toggles the button.
Menu Button	Enter, Space or Down Arrow	Opens the menu.
	Esc	Closes the menu.
Option Buttons	Left Arrow	Navigates to the previous enabled button on the left, wrapping around at the end.
	Right Arrow	Navigates to the next enabled button on the right, wrapping around at the end.

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Table B-1 (Cont.) UI Keyboard Shortcuts

User Interface Component	Keyboard Shortcut	Action
Checkbox Set	Tab	Set focus to the first focusable checkbox in the checkbox set. Unavailable checkboxes are not focusable. If hints, help instructions, or messages exist in a note window, it opens the note window.
Checkbox	Space	Toggles the checkbox. If the checkbox is deselected, it selects it and if the checkbox is selected, it deselects it.
	Tab	Sets focus to the next focusable checkbox in the checkbox set. Unavailable checkboxes are not focusable. If the target is the last focusable checkbox in the checkbox set, the focus goes to the next focusable item after the oj-checkboxset.
	Shift+Tab	Sets focus to the previous focusable checkbox in the checkbox set. Unavailable checkboxes are not focusable. If the target is the first focusable checkbox in the checkbox set, the focus goes to the previous focusable item before the oj-checkbox set.
List	Enter	Selects the highlighted choice from the list.
	Enter	Sets the input text as the value.
	Up Arrow or Down Arrow	Highlights the option item on the list in the direction of the arrow. If the list is not open, it expands the list.
	Esc	Collapses the list. If the list is already closed, do nothing.
	Tab	Sets the focus to the list. If hints, titles, or messages exist in a note window, it opens the note window.
Table	Ctrl+Space	Selects all of the cells in the current column. This is only available if multiple cell selection mode is enabled.
	Shift+Space	Selects all of the cells in the current row. This is only available if multiple cell selection mode is enabled.
	Shift+Arrow	Extends the current selection.
	Ctrl+Arrow	Moves the focus to level 0 of the active index of the header in the arrow direction if it exists.
	Shift+F10	Brings up the context menu.
	F2	Makes the content of the cell actionable
	Left Arrow	Moves the focus to the cell of the previous column within the current row. There is no wrapping at the beginning or end of the columns. If a row header is present, then the row header next to the first column of the current row will gain focus.
	Right Arrow	Moves the focus to the cell of the next column within the current row. There is no wrapping at the beginning or end of the columns.
	Up Arrow	Moves the focus to the cell of the previous row within the current column. There is no wrapping at the beginning or end of the rows. If a column header is present, then the column header preceding the first row of the current column will gain focus.

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Table B-1 (Cont.) UI Keyboard Shortcuts

User Interface Component	Keyboard Shortcut	Action
	Down Arrow	Moves the focus to the cell of the next row within the current column. There is no wrapping at the beginning or end of the rows.
	Home	Moves the focus to the first (available) cell of the current row.
	End	Moves the focus to the last (available) cell of the current row.
	PgUp (Page Up)	Moves the focus to the first (available) cell in the current column.
	PgDn (Page Down)	Moves the focus to the last (available) cell in the current column.
	Esc	If the cell is actionable, it exits actionable mode.
Table - Column Header Cell	Space	If multiple selections are enabled and are not in the selection mode row, then the columns underneath the header are selected.
	Shift+Right Arrow	If multiple selections are enabled and are not in the selection mode row, the column selection extends to the right by the number of columns covered by the header to the right of the current selection frontier header.
	Shift+Left Arrow	If multiple selections are enabled and are not in the selection mode row, the column selection extends to the left the number of columns covered by the header to the left of the current selection frontier header.
	Shift+Up Arrow	If multiple selections are enabled and are not in the selection mode row and the current selection frontier header has a parent nested header, then the column selection extends to cover the columns beneath the parent header. Extending the selection with arrow keys uses the parent level. If the parent header is directly preceding the anchor header, then the anchor shifts to the parent header and future selections are based on the parent header. If you are already at the highest level then nothing will happen.
	Shift+Down Arrow	If multiple selections are enabled and are not in the selection mode row and the current selection frontier header has a child nested header, then the column selection extends to cover the columns beneath the child header. Extending the selection with arrow keys uses the child level. If the child header is directly beneath the anchor header, then the anchor shifts to the child header and future selections are based on the child header. If you are already at the lowest level, it moves into the databody and selects the first cell underneath the header.
Table- Row Header Cell	Space	If multiple selections are enabled and are not in the selection mode row, the columns underneath the header are selected.

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Table B-1 (Cont.) UI Keyboard Shortcuts

User Interface Component	Keyboard Shortcut	Action
	Shift+Right Arrow	If multiple selections are enabled and are not in the selection mode row, the column selection extends to the right by the number of columns covered by the header to the right of the current selection frontier header.
	Shift+Left Arrow	If multiple selections are enabled and are not in the selection mode row, the column selection extends to the right left the number of columns covered by the header to the left of the current selection frontier header.
	Shift+Up Arrow	If multiple selections are enabled and are not in the selection mode row and the current selection frontier header has a parent nested header, the column selection will extend to cover the columns beneath the parent header. Extending the selection with arrow keys uses the parent level. If the parent header is directly preceding the anchor header, then the anchor shifts to the parent header and future selections are based on the parent header. If you are already at the highest leve then nothing will happen.
	Shift+Down Arrow	If multiple selections are enabled and are not in the selection mode row and the current selection frontier header has a child nested header, then the column selection extends to cover the columns beneath the child header. Extending the selection with arrow keys uses the child level. If the child header is directly beneath the anchor header, the anchor shifts to the child header and future selections are based on the child header. If you are already at the lowest level, it moves into the databody and then selects the first cell underneath the header.
Date Editor	Enter	Selects the currently focused day.
	Up Arrow	Moves up in the grid.
	Down Arrow	Moves down in the grid.
	Right Arrow	Moves right in the grid.
	Left Arrow	Moves left in the grid.
	Esc	Closes the grid.
	Home	Moves the focus to first day of the month.
	End	Moves the focus to last day of the month.
	PgUp	Switches to the previous month.
	PgDn	Switches to the next month.
	Alt+PgUp	Switches to the previous year.
	Alt+PgDn	Switches to the next year.
	Ctrl+Alt+PgUp	Switches to the previous by step by months.
	Ctrl+Alt+PgDn	Switches to next by step by months.

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Table B-1 (Cont.) UI Keyboard Shortcuts

User Interface Component	Keyboard Shortcut	Action
	Ctrl+Alt+T	Places the focus on the Today button if it is available.
Overflow Menu Button	Enter or Space	Opens the menu. This is applicable only for the horizontal tab bar when the overflow is set to the window.
Option Set	Up Arrow	Selects the previous input in the group.
	Down Arrow	Selects the next input in the group.
	Tab	Sets the focus to the selected option input. If hints, titles, or messages exist in a note window, it opens the note window.

Other Keyboard Shortcuts

Table B-2 lists keyboard shortcuts that are not specific to the UI for RPASCE and RPASCE applications.

Table B-2 Other Keyboard Shortcuts

Item	Keyboard Shortcut	Action
Workbook	Shift+F10	Opens the context menu
	F9	Calculates
	F8	Commits
Select any open workbook	Delete	Closes the open workbook tab.
Visual Planning Workbooks	F2 and Tab	Allows card elements to become accessible.
Alerts On Global Toolbar	Spacebar+F6+Tab	Allows elements of the Alert window to become accessible.
Edit View Dialog - Details Tab - Attributes Table	F2+Spacebar	Allows the View and Sort checkboxes to become editable.
Workbook	Esc+Tab	Cycles through the actions items or buttons across the application.
Cut	Ctrl+x	Cuts the data from the source and stores it in clipboard.
Copy	Ctrl+c	Copies the data from source and stores it in clipboard.
Paste	Ctrl+v	Pastes the data from the clipboard to the destination.
Undo	Ctrl+z	Undoes the last change.
Redo	Ctrl+y	Redoes the last change.
Global Toolbar	Left or Right Arrow	Navigates within the global toolbar.

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C

Troubleshooting

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

Accessing Multiple RPASCE Applications

A user may need to access multiple RPASCE applications, such as MFPCS, Assortment Planning, and Inventory Planning Optimization Cloud Service-Demand Forecasting, 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.

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