

Oracle® Retail Value Chain Collaboration
User Guide, Release 12.1

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Glossary

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Preface

The Oracle® Retail Value Chain Collaboration User Guide explains the basic configuration procedures of the Value Chain Collaboration Module through the web Graphical User Interface (GUI). This guide provides an easy, intuitive interface that lets anyone to view, create, edit, delete data and share that data in whatever way that is most meaningful. It contains procedures:

- To view, edit and compare data streams
- To configure extracts and data stream exceptions
- To manage exceptions
- To generate different types of reports
- To calculate the business metrics
- To configure events to create visibility and collaboration on Promotions
- To calculate time-series based statistical forecasts
- To develop supply plans that meet target service levels
- To configure appropriate roles and User rights to the appropriate level of users
- To manage read/write access through different levels of security
- To create purge requests
- To provide the Scheduler user interface that allows user to instruct the Scheduler Server to execute any predefined tasks.

Audience

Anyone with an interest in developing a deeper understanding of the underlying processes and architecture supporting Oracle Retail Value Chain Collaboration (VCC) functionality will find valuable information in this guide. There are three audiences in general for whom this guide is written:

- Business analysts looking for information about processes and interfaces to validate the support for business scenarios within VCC and other systems across the enterprise.
- System analysts and system operations personnel
 - Who are looking for information about VCC's processes internally or in relation to the systems across the enterprise.
 - Who operate on VCC regularly.

- Integrators and implementation staff with overall responsibility for implementing VCC.

Related Documents

For more information, see the following documents in the Oracle Retail Value Chain Collaboration documentation set:

- *Oracle Retail VCC Release Notes*
- *Oracle Retail VCC Installation Guide*
- *Oracle Retail VCC Operations Guide*

Customer Support

- <https://metalink.oracle.com>

When contacting Customer Support, please provide:

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

Part I

Oracle Retail Value Chain Collaboration

Part I contains the following chapters:

- [About the Value Chain Collaboration User Guide](#)
- [Introduction to Oracle Retail VCC Day-to-Day Tasks](#)
- [Data](#)
- [Extracts](#)
- [Exceptions](#)
- [Exception Criteria](#)
- [Reports](#)
- [Metrics](#)
- [Preferences](#)

About the Value Chain Collaboration User Guide

Oracle Retail VCC Help

Due to the modular nature of the Oracle Retail VCC, many of the images contained in these help files may be different than what appears on your screen.

The options that appear in the VCC's left menu are determined by the user role you are assigned, which modules you have access to, and whether or not your company has obtained a license for those modules. Therefore, there may be some menu options displayed in the screenshots that will not be accessible to you.

Current screenshots display only the "Tea Leaves" color scheme, which is configured in Preferences - General - Theme. Some instructions and screenshots contained in this document may vary slightly from the final product release of Oracle Retail VCC.

Introduction to Oracle Retail VCC Day-to-Day Tasks

This chapter includes the following topics:

- [Browser Compatibility](#)
- [Platform Support](#)
- [Logging In to Oracle Retail VCC](#)
- [Logging Out of Oracle Retail VCC](#)
- [The Oracle Retail VCC User Interface.](#)

Browser Compatibility

Oracle Retail VCC supports Internet Explorer versions 5.0, 5.5, and 6.0.

If you experience difficulties when using Oracle Retail VCC, set your browser settings according to guidelines provided in [Browser Settings](#).

Platform Support

For a list of what platforms Oracle Retail VCC supports, see [VCC Supported Platforms](#).

Logging In to Oracle Retail VCC

Before you can log in to Oracle Retail VCC, you must

- be previously established as a valid Oracle Retail VCC user
- know your Oracle Retail VCC username and password
- have an assigned a role that enables you to specific user privileges dependant on the user group to which you are assigned.
- have a system that is running.

Contact your system administrator or hosting provider for details.

To log in to a local Oracle Retail VCC system:

1. Make sure that the web server is up and running.
2. Enter a URL in VCC Configurations that will direct the JSP engine to the correct context path. This can be done by selecting Start - Programs - VCC - VCC

Configurations - VCC Configuration. Select the Client tab, and enter a URL in the File Path field. The URL format would resemble

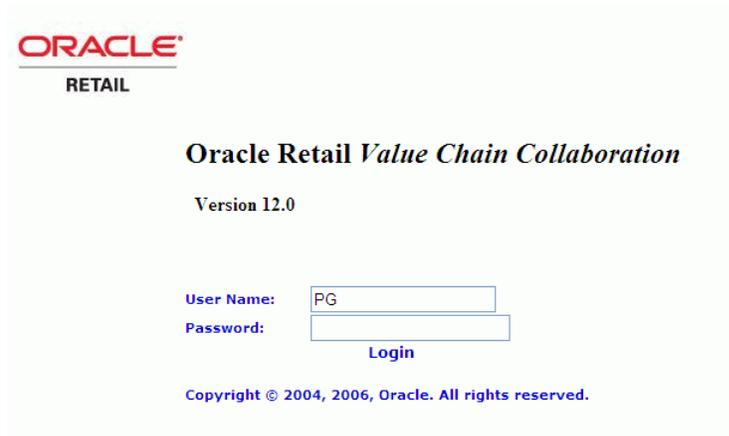
http://host_name/Syncra_virtual_directory_name/jsp/login.jsp

For example:

http://odyssey/xt/jsp/login.jsp

The Oracle Retail VCC **login** screen appears.

Figure 2–1 Oracle Retail VCC Login screen



ORACLE
RETAIL

Oracle Retail Value Chain Collaboration
Version 12.0

User Name: PG
Password:

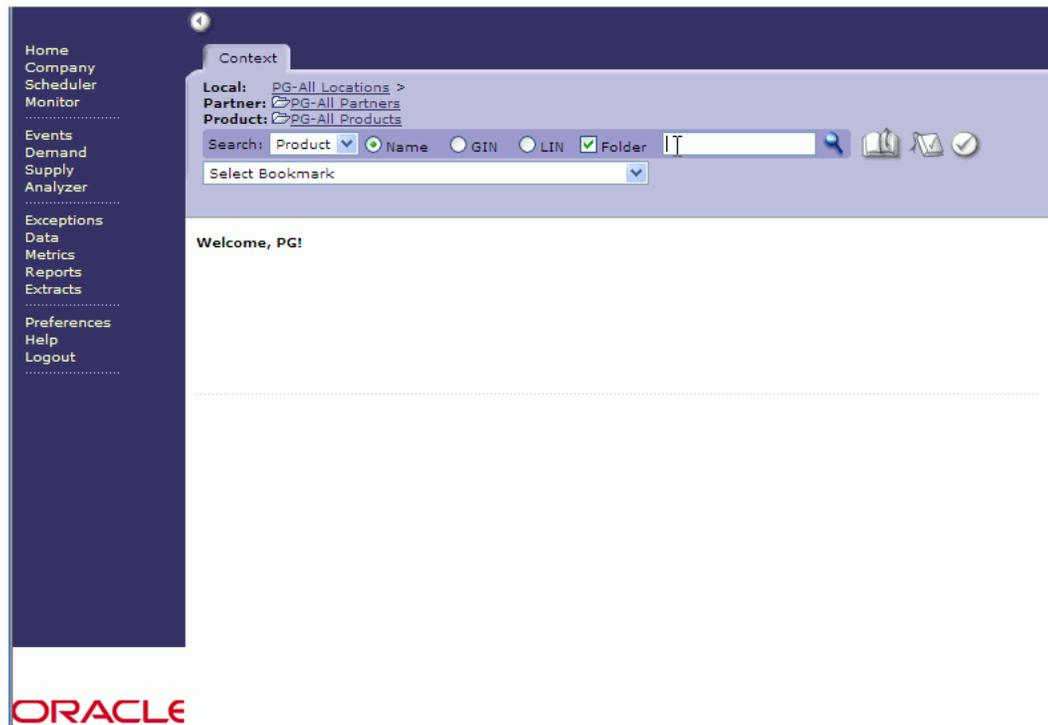
Login

Copyright © 2004, 2006, Oracle. All rights reserved.

This step may already have been completed by your administrator. For more information, refer to the Installation and Configuration Guide.

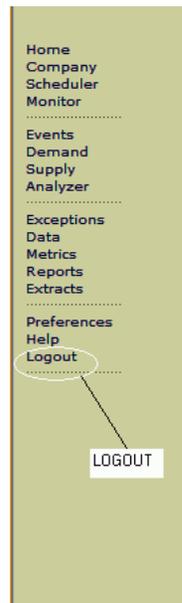
3. Enter your user name and password. You can change your password after entering a valid password. See [Changing Your Password](#).
4. Once you have logged in, the VCC user interface appears.

Figure 2–2 VCC User Interface



Logging Out of Oracle Retail VCC

Figure 2–3 Logging Out of Oracle Retail VCC



To log out of VCC, click **Logout** at the bottom of the **Menu**. If you do not log out of VCC using the **Logout** button, your session information is maintained until it expires (the default is 15 minutes). If you return before your session has expired, VCC continues your previous session.

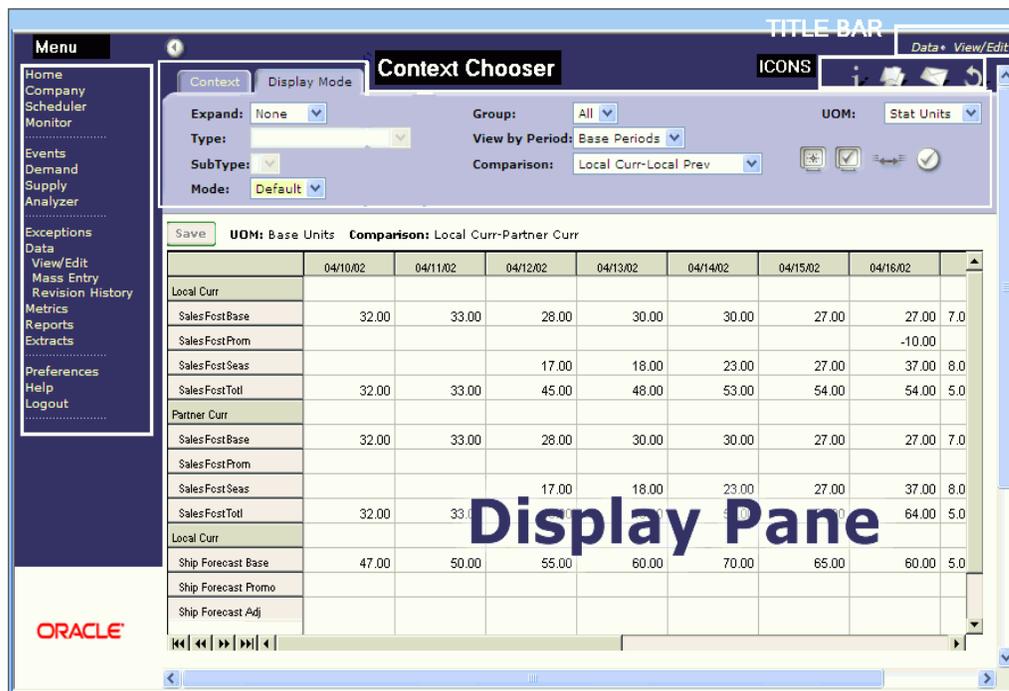
The Oracle Retail VCC User Interface

Before you begin using the Oracle Retail VCC user interface, familiarize yourself with its basic components and layout, which include

- Title Bar
- General Icons
- List View Icons
- Menus and Submenus
- Context Chooser
- Display Pane
- Required Fields

Below is the Oracle Retail VCC user interface, including its basic components (**Context Chooser**, **Menu** and **Submenus**, and **Display pane**) and layout.

Figure 2–4 Oracle Retail VCC User Interface



Title Bar

The **Title Bar** displays the Oracle Retail VCC menu item you have selected at the right of the blue banner at the top of the interface in yellow text.

General Icons

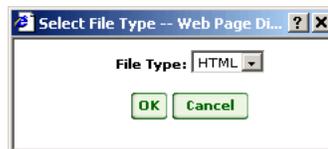
The following icons allow you to refresh, copy, export, and print information in the user interface. The icons appear in different combinations depending on what menu or submenu is selected.

Table 2–1 General Icons

Icon	Icon Name	Description
	Refresh	Refreshes the page.
	Get link to this page	Copies the URL of your current page to a new window for pasting into another application. Use the URL in the new window (shown below) to paste into an application in order to navigate directly back to this page.
	Email this page	Mails a link of the current page electronically to the e-mail address of your choice.
	Printer-Friendly View	Displays a printable version of the current page. You must set the paper orientation to Landscape in order to print the entire printer friendly-view. The Printer-Friendly View will only print the page that is currently displayed. In order to print multiple pages, you must display each page individually and click the Printer-Friendly icon.
	Configure List	A shortcut that allows you to configure List screen preferences exactly as you would in Preferences - Layout - Lists. Changes made through either route will effect the same change and will be reflected in both configuration screens.
	Export Data	Exports data to either a .csv (Excel spreadsheet format) or an HTML file (viewable in Internet Explorer). This icon is not available on all screens. For more information, see Export Data .
	Stream Info	Opens a new browser window which displays the data stream types available to you based on company and user stream assignments. For more information, see Stream Info .

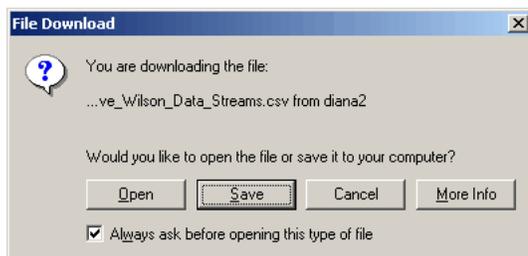
Export Data

Some screens export in .csv format only. When this is the case, you will not be presented with the above option to select file format.

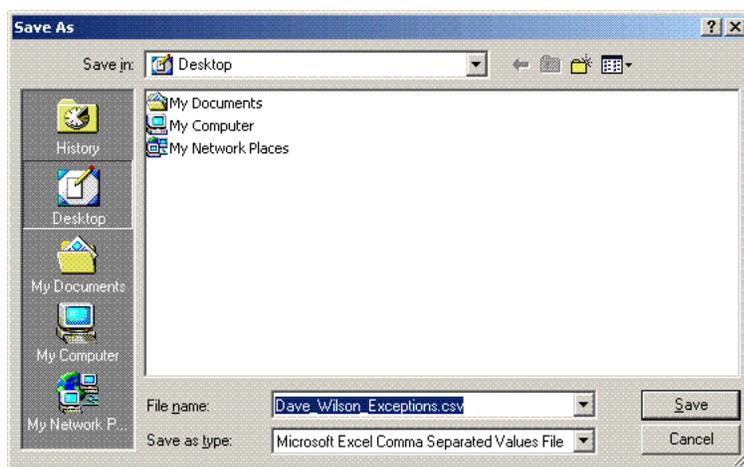
Figure 2–5 Export Type

All List screens allow exporting in either file format. The file will be saved to a location that you specify in the **Save As** dialog box.

- When you click Export Data, the following File Download dialog box appears:

Figure 2–6 File Download

- Click **Save**, and you will be prompted for the location that you wish to save the file to.

Figure 2–7 Save As Dialog Box

- In .csv format, file will be downloaded as a comma-delimited flat file to the location you specify. If HTML format was selected, the file will be formatted as HTML.

Note: If you decide to open the file directly, rather than saving to a file, you need to click the **Open** button on two consecutive dialog windows.

Stream Info

Stream Info screen displays the data stream types available to you based on company and user stream assignments.

- Company Assignments – assigned in **Configuration - Stream Types - Assign** screen
- User Assignments assigned in **Roles and Users** (company or hub-level) - **Edit Stream Access** screen

Users see a list of assigned company streams. Check the Full Access column to see if you have Full (Y) or Read-Only (N) access to the company streams assigned to you.

Figure 2-8 Stream Info screen

Stream Name	Stream Type	Accumulation Rule	Revision History	Edit by	Edit When	Substreams	Decimal Places	Apply UOM	Fill Bucket	Full Access
Actual "Sales"	2	Movement	No	Buyer	Past	2	2	Yes	No	Yes
DC Inventory	28	Balance	No	Buyer	Past	1	2	Yes	No	Yes
DC Receipts	29	Movement	No	Buyer & Seller	Past	1	2	Yes	No	Yes
DC Shipments	35	Movement	No	Seller	Past	1	2	Yes	No	Yes
Finished Goods Inv	33	Balance	No	Buyer	Past	1	2	Yes	No	Yes
Sales Forecast	17	Movement	Yes	Buyer & Seller	Future	3	2	Yes	No	Yes
Shipment Forecast	44	Movement	Yes	Buyer & Seller	Future	3	2	Yes	No	Yes

Figure 2-9 Stream Info Detail screen

Name: Actual "Sales"

Description: Actual point-of-sale item movement

	Long Name	Short Name	Show Year Ago	Real Time Export
Sub-Types:	ActualSales:Base	ActSales:Bas	Yes	No
	Base point-of-sale item movement			
	ActualSales:Promo	ActSales;Pro	Yes	No
	Promotional point-of-sale item movement			
Total:	ActualSales-Total	ActSales-Tot	Yes	N/A
	Total point-of-sale item movement			

Back

Stream Name – the name of the stream

Stream Type – the stream type code

Accumulation Rule – a fixed attribute of the data stream that indicates how it behaves when aggregated. There are three accumulation rules that can apply to a data stream: movement, balance, and measure. Movement accumulates across all dimensions (product, partner, local, and period); balance accumulates across three dimensions (product, partner, and local); measure does not accumulate at all.

Revision History – if the stream has a revision history, Y (Yes), if not, N (No)

Edited By – either the seller, buyer, or both

Edited When – either the past, future, or always

Substreams – the number of substreams for the data stream

Printer-Friendly View – Clicking this button will open the printer-friendly view. You can then generate a printed list of your current stream information by selecting Print.

List View Icons

The following icons appear most frequently in tabbed **List** views in Oracle Retail VCC. They are located in the Display Pane section of the screen.

As a convenience, some of these icons are actively clickable to allow for mass selection. For instance, clicking the **Delete** or **Override Execute Time** icons will allow you to select or deselect all the check boxes in the column below the icon.

Figure 2–10 List View Icons

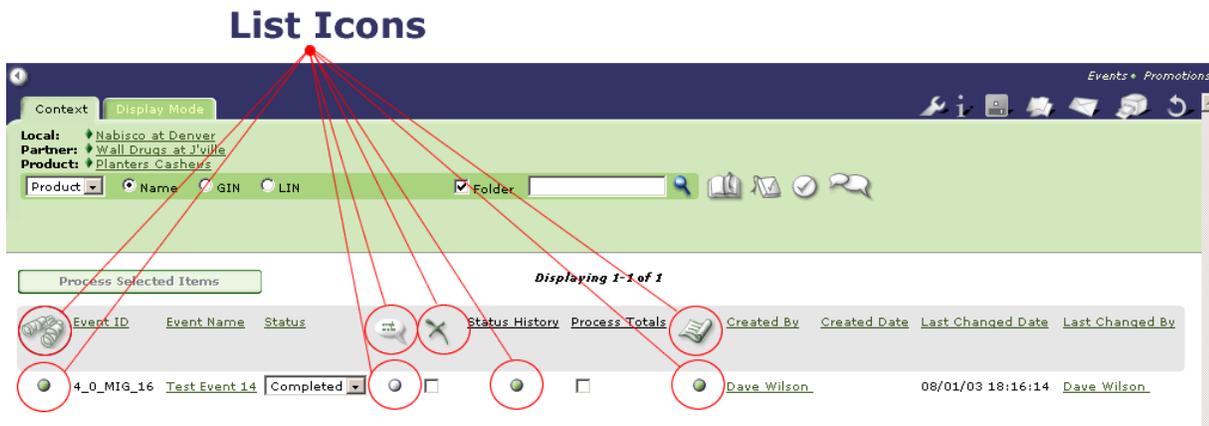


Table 2–2 List View Icons

Icon	Icon Name	Description
	Drilldown Dot	Indicates that there is additional data that can be viewed or edited on the next screen by drilling down through the link. The drilldown has a variety of uses, such as viewing comments, accessing printer-friendly views, viewing/editing item details, etc. When the dot appears grey, such as in the Comment column, this indicates an absence of data. You may click the grey dot to leave a comment; after doing so it will become blue.
	Delete	Allows for multi-selection of check boxes in its column. To select or deselect all items for deletion, click the Delete icon. Click the individual check boxes in the column beneath it to select/deselect items to be deleted.
	View/Edit	This column contains blue drilldown dots that allow you to view or edit item details.

Table 2–2 (Cont.) List View Icons

Icon	Icon Name	Description
	Copy	This icon appears in only two places, the Promotion - List screen, and Exceptions - Criteria - List. Clicking on the Copy icon will provide a duplicate of the selected criterion or promotion. The copy can then be modified and renamed.
	View/Edit Comment	This icon displays a column of drilldown dots that can be clicked to view or add comments about a given item. Comments are posted in a discussion-thread style.
	Printer-Friendly View	Drilldown dots can be clicked to access details about the selected item in a printer-friendly format.
	Override Execute Time	Overrides the execution time for job processing when checked and Apply Changes is clicked. Click the Override icon to select/deselect all items on the current page to be overridden. Click the individual check boxes in the column beneath it to select/deselect items to be overridden.

Menus and Submenus

Menus and Submenus open screens in the **Display** pane. Depending on the modules and menu items accessible to you, Menus and Submenus will allow you to

- Create and edit events (VCC Events)
- Create demand forecasts (VCC Demand)
- Create supply plans (VCC Supply)
- Display data streams in table or graph mode (VCC Platform)
- Create values for a data stream (VCC Platform)
- Display a data stream revision history (VCC Platform)
- Display exceptions in the Exceptions Inbox (VCC Platform)
- Display exception criteria (VCC Platform)
- Create exception criteria (VCC Platform)
- Create and display metrics (VCC Platform)
- Make extract requests (VCC Platform)
- Generate reports (VCC Platform)
- Create and edit display preferences (VCC Platform)
- Change Password (VCC Platform)
- Open custom links (VCC Platform)
- Display Help options, which consist of an online user manual, access to the Support web site, and the software's About screen information. (Xt Platform)
- Log out of Oracle Retail VCC (Platform)

You can hide/show the Menu by clicking the left arrow image above the **Context Chooser**. To show the menu again, click the right arrow in the upper left corner of the screen.

Note: The **Menu** items available to you depend on the role and modules you are assigned. For details, see [User and Role Permissions](#).

Context Chooser

The inter-enterprise supply chain data stored in Oracle Retail VCC is associated with products (or product categories) moving between seller locations (or regions) and buyer locations (or regions). The combination of seller locations, buyer locations and products specifies the Context.

The **Context Chooser** is divided into tabs that allow you to view, search, and select your context in different ways. The tabs are:

- See [Context](#).
- See [Display Mode](#).

Two other tabs, Parameters and Trial Data, appear only in VCC Demand (see <CROSS REF> for details) and VCC Supply (see [Using Interactive Supply](#) for details) modules.

The **Context Chooser** allows you to navigate through this data by selecting

- Your company location or location folder (category) and your trading partner location or location folder (category).
- A product or product folder (category).
- A bookmarked context that you had saved previously.
- The search option, which will look for specific Local, Partner, or Product identifiers and return search results in a list format.

Context

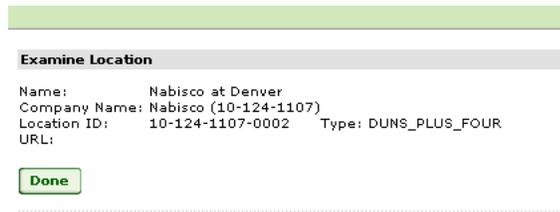
Context Chooser -Context tab displays the current context components (local, partner, and product) you have selected, and also allows you to select a different context. When applicable, you will be able to see the 3 nearest hierarchy items for each dimension.

Figure 2–11 Context Chooser - Context Tab



Viewing Local, Partner, and Product Details

The small diamond-shaped icon to the left of the context links can also be selected. By clicking on this icon, you can drill down for detailed information on the current local, partner, or product. By clicking the Examine icon, the detail view appears, as seen below.

Figure 2–12 Examine Location screen

When you are finished viewing the component's information, click Done.

Bookmarking a Context

Click the **Bookmark this context** icon in the lower right-hand corner of the **Context Chooser** to bookmark the context. You can later access the bookmarked contexts without having to reselect Local, Partner and Product levels. For information on retrieving your bookmarked contexts, see [Selecting and Removing a Bookmark](#).

It is possible to select your context in the **Context** tab three different ways:

- Clicking the links
- Selecting a bookmark
- Using the Search feature

Clicking the Links

To select the context components by clicking the links

1. Select **Context Chooser - Context tab**.
2. Click on the links next to the context components (Local, Partner, and Product) and a hierarchy tree screen appears in the **Display** pane.

Figure 2–13 Hierarchy Tree

3. Select the leaf or folder you want for your context.

Note: Once you have selected something other than the current folder or leaf, you will see the link in the chooser turn bold. This indicates that the context in the chooser is in transition or not yet current, since you have not yet clicked the **Set** button. You can return to the previous context by selecting the **Cancel Context Change** button located on the chooser pane.

4. Repeat steps 2 & 3 until the context displayed in the chooser is the one you want.
5. Click the **Set** icon.

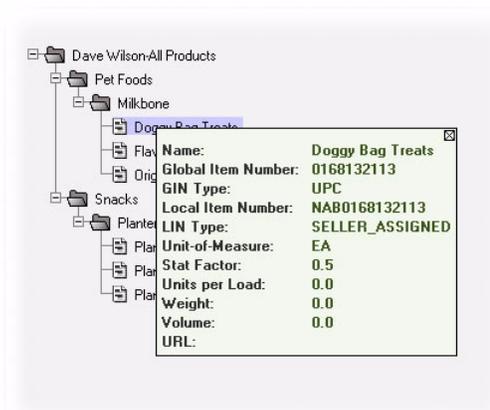
Note: You must click either **Set** or **Cancel Context Change** before moving to a new screen.

6. Click the **Bookmark this context** icon to save the context. (Optional)

Each product has a profile that specifies the product's UPC (universal product code), stat factor, product name, local part number, unit of measure, and conversion factors, if defined. To view a product's profile information

1. Click **Context Chooser - Select Context**.
2. Click **Products** or the currently displayed product to open the product hierarchy.
3. Right click on a specific product and the product's profile information appears.

Figure 2–14 Product Profile Information



4. Click the **Close** icon in the upper right-hand corner of the product profile information window to return to the product hierarchy.

Along with showing the current context, the **Context** tab includes other functions depending upon what Oracle Retail VCC menu item you have selected. When you select **Data - Mass Entry** from the VCC menu (shown below), **Context Chooser -Context** includes a link to select a time period and a drop-down list to select the data stream type. Make your selections and click the **Set** icon.

Figure 2–15 Context Chooser - Context Tab

The screenshot shows the 'Context' tab in the Oracle Retail VCC user interface. It features a header with 'Context' and 'Data + Mass Entry' options. Below the header, there are several fields: 'Local: Select Local', 'Partner: Select Partner', and 'Product: Selected Products'. Further down, there are fields for '* Start Date:', '* End Date:', 'Type: DC Receipts', and 'SubType: DC Receipts'. At the bottom, there are radio buttons for 'Name', 'GIN', and 'LIN', and a checked 'Folder' checkbox.

Collaboration Comments

The Collaboration Comments icon allows you to add comments to the context you have selected (leaf-level contexts only). These comments can be viewed by your partners, and can contain up to 255 characters per post. Comments will appear in a threaded-discussion style format, with many comments, and replies to those comments visible on the same screen. When there are no comments at a selected context, the speech bubble icon will appear with no babble inside to indicate an absence of data. After a comment has been entered, the icon will contain filled speech bubbles.

To enter a comment for a given context

1. Select Context Chooser - Context.
2. Set your context.
3. Click on the Collaboration Comment icon. The comment screen appears.

Figure 2–16 Collaboration Comment screen

The screenshot shows the 'Collaboration Comment screen'. It features a table with two columns: 'Author' and 'Comment'. Below the table, there is a large text area labeled 'Your Comment:' and two buttons: 'Post' and 'Done'.

4. Enter a comment and click Post. Your comment will appear under the Comment column, and your name and company under the Author column.

Figure 2–17 Collaboration Comment Detail screen

The screenshot shows the 'Collaboration Comment Detail screen'. It features a table with two columns: 'Author' and 'Comment'. The 'Author' column contains 'Dave Wilson' and 'Nabisco'. The 'Comment' column contains 'Posted On: 10/03/03 14:49:59' and 'Order more fast! This product is flying off the shelves!'. Below the table, there is a large text area labeled 'Your Comment:' and two buttons: 'Post' and 'Done'.

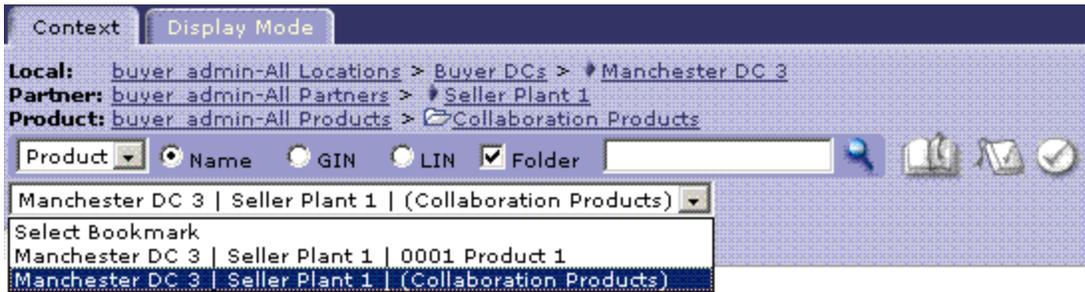
Your partners will be able to post new comments on the same context thread, which will be viewable by once again clicking on the Collaboration Comments icon for that given context.

- Click Done when you have finished reading and entering comments.

Selecting and Removing a Bookmark

To view contexts that you have bookmarked, you can use the Bookmark quick-select drop-down menu, or the View Bookmarks tool.

Figure 2–18 Context Tab - Bookmark Drop-down Menu

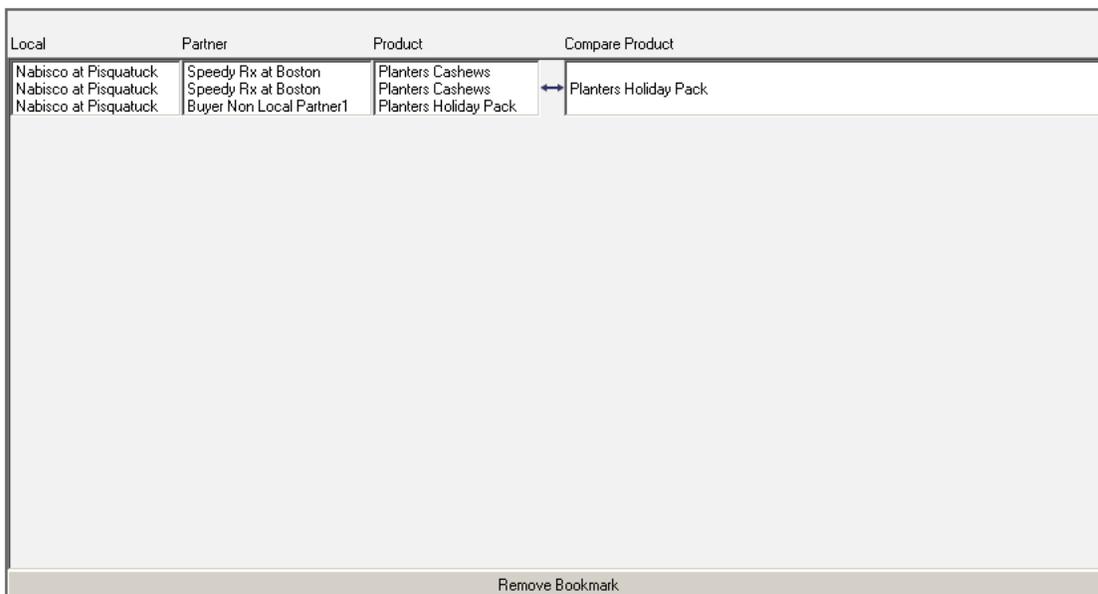


The Bookmark drop-down menu will allow you apply a saved context without having to then click the **Set** icon. Simply select one of the items in the drop-down and your context will change to it.

To remove saved Bookmarks, or as another way to apply them, you can use the View Bookmarks tool:

- Access the Context Chooser
- Click **View Bookmarks** icon and your list of bookmarks appear in the **Display** pane.

Figure 2–19 List of Bookmarks



- Select your context from the list and click the **Set** icon to set the context.

To close the bookmark display pane without selecting a bookmark, click the **Cancel Context Change** icon.

To remove a bookmark from your bookmark list

1. Select **Context Chooser - Context**.
2. Click **View Bookmarks** icon and your list of bookmarks appear in the Display pane.
3. Highlight the bookmark you want to delete.
4. Click **Remove Bookmark**.

Using the Search Feature

To search for a context component

1. Click **Context Chooser - Context tab**.
2. Select the context component (Local, Partner, or Product) that you want to search for from the drop-down list.
3. Search local or partner location using any of the following criteria:

- Name or partial name
- Location ID

Search products using any of the following criteria:

- Product name or partial product name
- Global Item Number (GIN) or Local Item Number (LIN)

With partial name searches you use the wildcard "*" character, for example,

Table 2–3 Wildcard Search Options

If You Enter	Search Result
Any alphanumeric character and "*", e.g., "N*"	Everything starting with the letter "N".
"*" and any alphanumeric character, e.g., "*w"	Everything ending with the letter "w".
"*", any alphanumeric character, and "*", e.g., "*d*"	Everything that contains the letter "d"

The wildcard search feature applies to all criteria.

Note: If your locale is set to a language that does not use ASCII characters, you can search using those characters.

4. After selecting your search criteria, click the search icon. The search returns a sorted list of all leaves that match your search criteria in the Display pane.

Figure 2–20 Search Result Screen

Name	Location ID
Buyer Non Local Partner1	nlb_123-0001
Speedy Rx at Boston	30-333-3333-0001
Quick Stop at Manhattan	50-555-5555-0001
Quick Stop at Brooklyn	50-555-5555-0002
Quick Stop at Riverhead	50-555-5555-0003

- Highlight the item you want in the sorted list and close the list in the **Display** pane. Click the **Set** icon to set the context. The selected item is set for the context.

Note: If the search returns only one item, it automatically is chosen for the context.

Comparing Products

The Data - View/Edit screen has an additional icon that allows you to select two products to compare. This feature enables simultaneous viewing of two products' data.

To compare two products

- Select a context that contains a leaf-level Product.
- Select Data - View/Edit from the menu. The View/Edit screen appears.

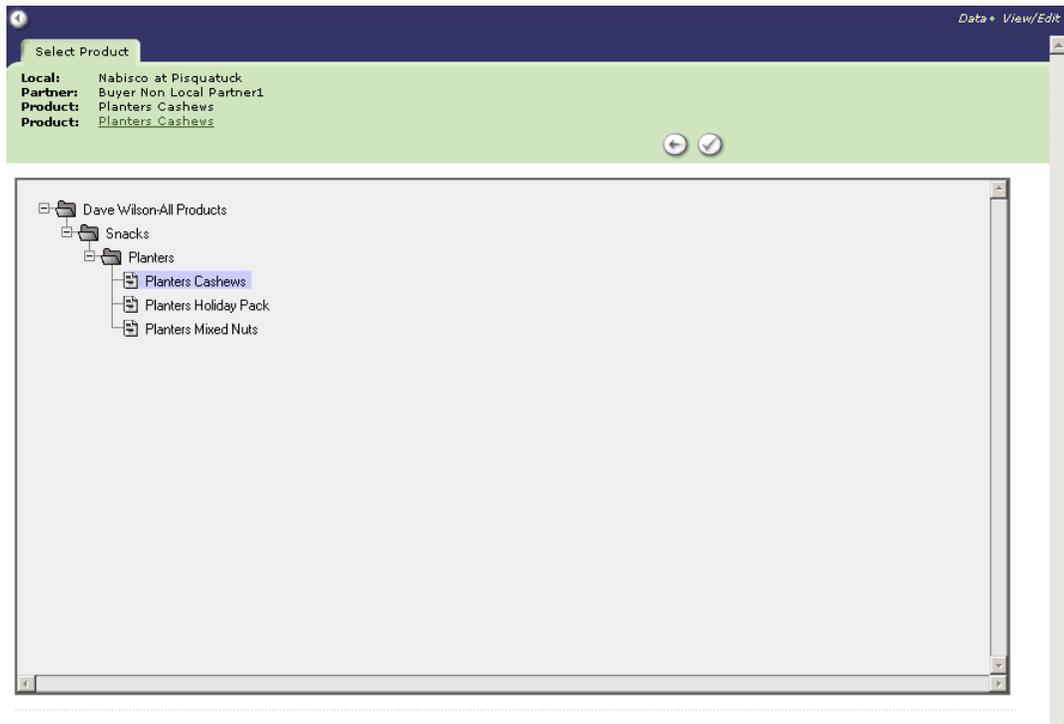
Figure 2–21 View/Edit Screen

The screenshot shows the 'View/Edit' screen in 'Data' mode. The interface includes a header with 'Context' and 'Display Mode' tabs, and a navigation bar with 'Local', 'Partner', and 'Product' dropdowns. The main area displays a table comparing 'Local Curr' and 'Partner Curr' across various sales forecast categories for the period 02/04/02 to 02/12/02. The table has columns for each date and rows for 'SalesFostBase', 'SalesFostProm', 'SalesFostSeas', and 'SalesFostTotl'. The 'Local Curr' section shows values of 125.00, 225.00, 325.00, and 675.00 respectively. The 'Partner Curr' section shows values of 100.00, 200.00, 300.00, and 600.00. Below the table, there are 'Table' and 'Graph' view options.

	02/04/02	02/05/02	02/06/02	02/07/02	02/08/02	02/09/02	02/10/02	02/11/02	02/12/02
Local Curr									
SalesFostBase	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00
SalesFostProm	225.00	225.00	225.00	225.00	225.00	225.00	225.00	225.00	225.00
SalesFostSeas	325.00	325.00	325.00	325.00	325.00	325.00	325.00	325.00	325.00
SalesFostTotl	675.00	675.00	675.00	675.00	675.00	675.00	675.00	675.00	675.00
Partner Curr									
SalesFostBase	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00
SalesFostProm	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00	200.00
SalesFostSeas	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00	300.00
SalesFostTotl	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00
Local Curr									
Ship Forecast Base									
Ship Forecast Promo									
Ship Forecast Adj									
Ship Forecast Total									
Partner Curr									
Ship Forecast Base									
Ship Forecast Promo									
Ship Forecast Adj									
Ship Forecast Total									

- Click the **Compare Products** icon in the chooser pane. The product tree appears.

Figure 2–22 Product Tree



4. Select the product you wish to compare with the previous product's data by highlighting a new leaf node on the product hierarchy tree.
5. Click the **Set** button. To return to the previous screen instead, click the **Back** button.

A new table containing three sets of data appears. The first data set contains the two products' combined totals (Planters Cashews + Planters Mixed Nuts), as seen in See Viewing and comparing Product data sets with the Context Chooser below. The second (Cashews Planters) and third (Cashews Mixed Nuts) sets contain each individual product's data.

Figure 2–24 Bookmark Product Comparisons

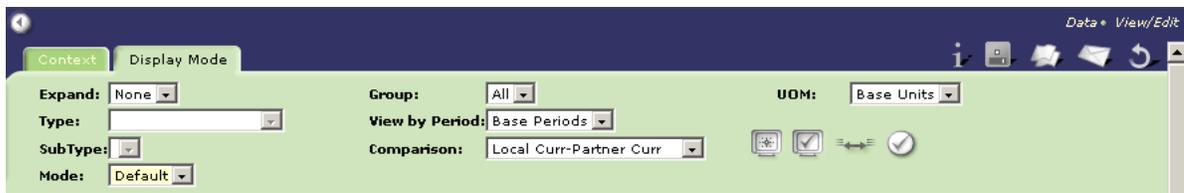
Local	Partner	Product	Compare Product
Nabisco at Pisquatuck	Speedy Rx at Boston	Planters Cashews	
Nabisco at Pisquatuck	Speedy Rx at Boston	Planters Cashews	↔ Planters Holiday Pack
Nabisco at Pisquatuck	Buyer Non Local Partner1	Planters Holiday Pack	
Nabisco at Pisquatuck	Buyer Non Local Partner1	Planters Cashews	↔ Planters Holiday Pack

Display Mode

Context Chooser - Display Mode allows you to choose how you display data streams, to search for exceptions, to customize how you view criteria, or to select a promotion event comparison type and time period, depending on what you select from the **Menu**. Below are examples of how the **Context Chooser -Display Mode** screen appears when you have selected one of the following from the Oracle Retail VCC menu: **Data - View/Edit**, **Exceptions - Inbox**, **Exceptions - Criteria**, or **Promotions - Plan**.

Data - View/Edit - Display Mode (shown below) lets you customize how your data streams are displayed. Make your selections and click the **Set** icon.

Figure 2–25 Data - View/Edit - Display Mode Screen

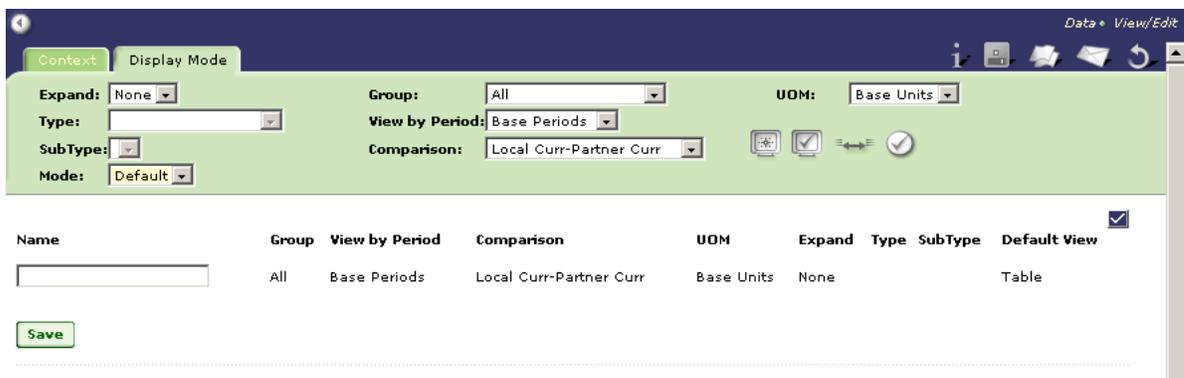


You can also save your display modes for future use by clicking the **Save this display mode** icon.

To save a display mode

1. Choose your Display Mode settings.
2. Click the **Save this display mode** icon , and the following screen appears:

Figure 2–26 Save a Display Mode



3. Enter a name for your display mode in the **Name** text box.
4. Click **Save**.

Once a display mode has been saved, you can select it from the **Mode** drop-down list. The screen automatically refreshes with the display mode settings you have chosen.

To view the details of or delete your saved display modes

1. Click the **View saved display modes** icon and a list of your saved display modes (shown below) appears showing the display modes'
 - Name
 - Group
 - View by Period
 - Comparison
 - UOM
 - Expand
 - Type
 - SubType
 - Default View

Figure 2–27 View Saved Display Modes



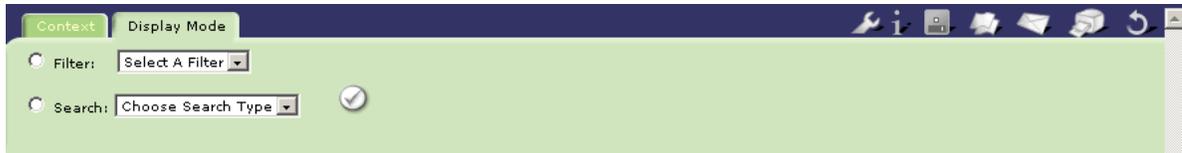
2. To delete a display mode click the **Delete** icon to select/deselect all items on the current page to be deleted. Click the individual check box to select/deselect that item to be deleted.
3. Click **Delete** to delete the item(s).
4. Click the check mark in the upper right corner of the display pane to return to viewing data.
 - **Expand** – Allows you to select the folder-level context item to show all of its leaf-level data. When your context contains a folder-level component, the **Display** pane shows all the items in the folder. The **Expand** function allows you to view each item within the folder.
 - **Type** – Allows you to select the data stream type that you want to view (e.g., a forecast, actual sales figures, or an inventory) in the Expand mode.
 - **Subtype** – Allows you to select a substream subtype that you want to view in the Expand mode. The substreams that are available are dependent on what data stream type you selected.

- **Group** – Allows you to select the group of stream types you would like to view.
- **View by Period** – Allows you to select a time period, e.g., Base Periods or any other period overlays that you have access to.
- **Comparison** – Allows you to choose the data streams that you want to compare:
 - Local Current to Local Previous – compares your current local data stream with your previous local data stream.
 - Local Current to Partner Current – compares your current local data stream to your partner's current data stream.
 - Partner Current to Partner Previous – compares your partner's current data stream with your partner's previous data stream.
- **UOM**– Allows you to select the unit of measure that you want to display in the Display pane such as base units, stat factor, loads, and currency, or any other custom UOMs that may be loaded and are applicable to the product. For details about creating custom UOMs, refer to the Oracle Retail VCC Implementor Guide.

Note: Custom UOMs appear as a choice only if all three dimensions of a context are at leaf levels.

Exceptions - Inbox - Display Mode contains filters and search features to allow you to quickly search for exceptions. Make your selections and click the **Set** icon.

Figure 2–28 *Exceptions - Inbox - Display Mode*



- **Filter** – Allows you to select previously created filters from a drop-down list to display all exceptions within specified ranges from an original data stream. For details about filters, see [Exception Inbox Filter and Search Features](#). For details about creating filters, see [Setting Inbox Filters Preferences](#).
- **Search** – Allows you to select search criteria from a drop-down list to quickly locate any individual exception without having to manually page through numerous exceptions. For details about the search feature, see [Exception Inbox Filter and Search Features](#).

Exceptions - Criteria - Display Mode allows you to select whether to show criteria at and above your context or at and below your context from a drop-down list. Make your selection and click the **Set** icon.

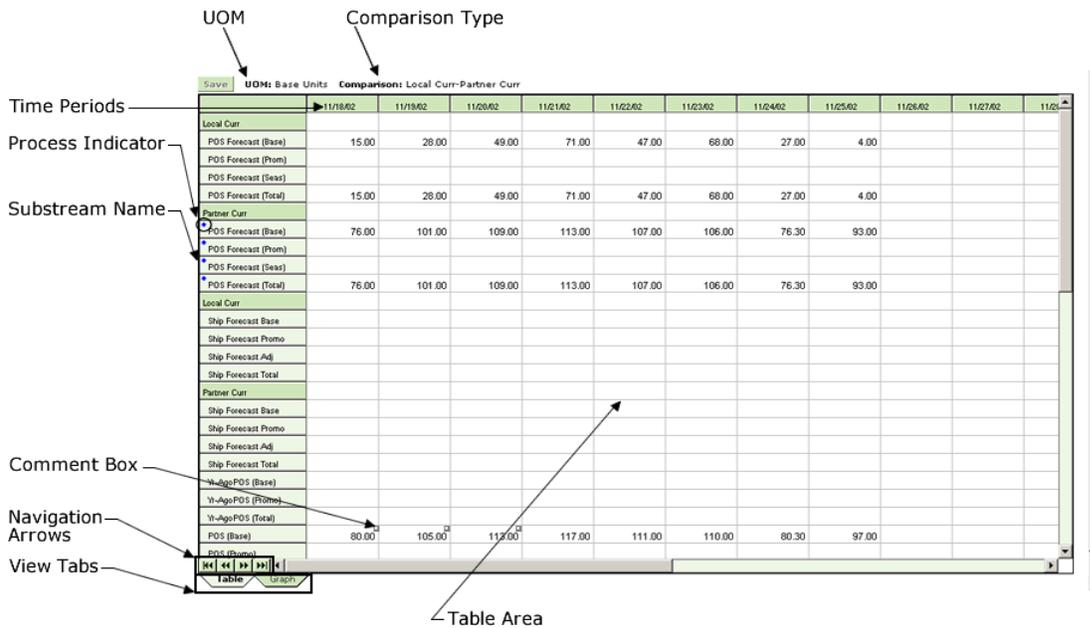
Display Pane

The **Display pane** is the primary display area for the Oracle Retail VCC user interface. It allows you to display the information you specify in the **Context Chooser** and Oracle Retail VCC menu. You can display data stream data in table or graph mode.

Table Mode

Oracle Retail VCC allows you to view and edit data stream data in a table mode.

Figure 2-29 Display Pane - Table Mode



The following items comprise the table format in the **Display** pane.

- **Time Periods** – Each column represents a time bucket (e.g.daily or weekly [base periods], or monthly, quarterly, yearly, or anything else [period overlay]).
- **Comment Box** – Each local editable cell contains a gray/blue box that, when clicked, allows you to create or view a comment. Gray indicates there are no comments. Blue indicates there are comments. Anyone in your company with access to the data stream can read and delete the comment associated with a changed field. Comments are limited to 100 characters.
- **Substream Name** – The name of each substream appearing in the table area for a context/display.
- **Process Indicator** – A blue diamond indicates that changes have not been processed. When the process is completed, the blue diamond disappears.
- **View Tabs** – Tabs allow you to toggle between Table and Graph view.
- **Table Area** – Area where the time-series data for a context appears.
- **Navigation Arrows** – Navigation arrows allow you to navigate the currently displayed time period data in the Table Area:

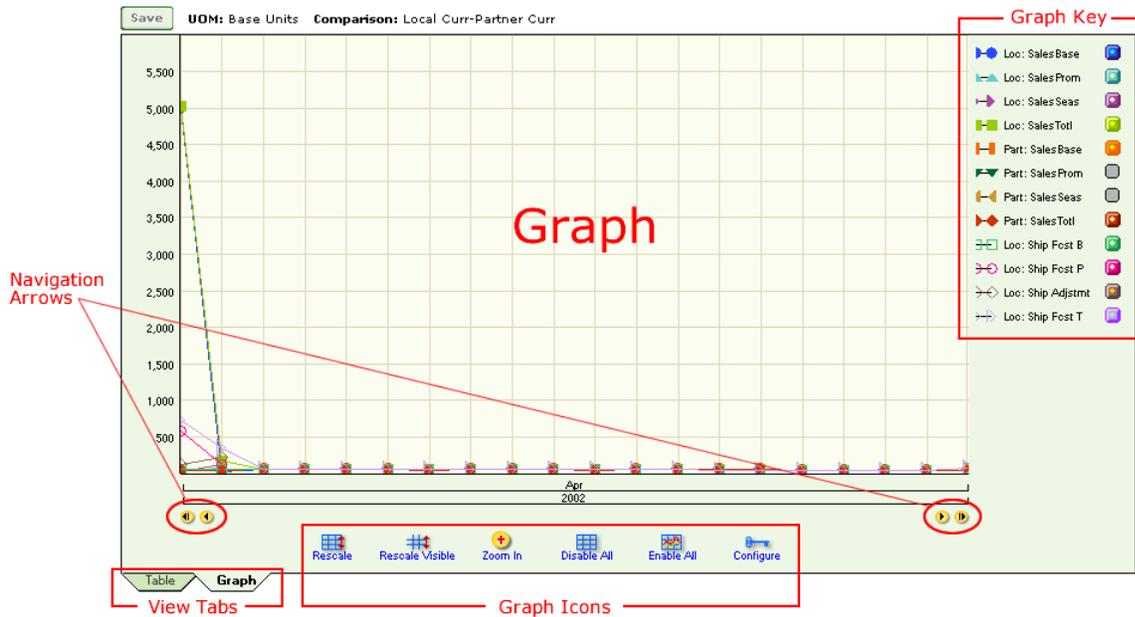
Table 2–4 Navigation Arrows

	<p>Beginning – If the first column in the current display period is not in the view, clicking this button brings you to the beginning of the current display period data.</p> <p>If the first column in the current display period is in the view, clicking this button brings you to the beginning of the previous period data.</p> <p>If there are no more previous periods to retrieve, clicking this button brings you to the beginning of the current display period data.</p> <p>The number of Period Display Columns in each period grouping is defined in Preferences - Layout - Table/Graph (see Setting Table/Graph Defaults Preferences).</p>
	<p>Back a page – clicking this button brings you to the previous page of the display period data you are viewing.</p>
	<p>Forward a page – clicking this button brings you to the next page of the display period data you are viewing.</p>
	<p>End – If the last column in the current display period is not in the view, clicking this button brings you to the end of the current display period data.</p> <p>If the last column in the current display period is in the view, clicking this button brings you to the beginning of the next period data.</p> <p>If there are no more next periods to retrieve, clicking this button brings you to the end of the current display period data.</p> <p>The number of Period Display Columns in each period grouping is defined in Preferences - Layout - Table/Graph (see Setting Table/Graph Defaults Preferences).</p>
	<p>Back – clicking this button moves you one column back in the display period.</p>
	<p>Forward – clicking this button moves you one column forward in the display period.</p>

Graph Mode

Oracle Retail VCC allows you to view a data stream in Graph Mode.

Figure 2-30 Display Pane - Graph Mode



The Graph Mode comprises the following items

- **Graph Key** – Shows each substream's short name and the line to which it is assigned.
- **Graph** – Area where the time-series data is displayed graphically.
- **Navigation Arrows** – Navigation arrows allow you to navigate the currently displayed time period data in the Graph Area:

Table 2-5 Navigation Arrows



Beginning – If the first column in the current display period is not in the view, clicking this button brings you to the beginning of the current display period data.

If the first column in the current display period is in the view, clicking this button brings you to the beginning of the previous period data.

If there are no more previous periods to retrieve, clicking this button brings you to the beginning of the current display period data.

The number of **Period Display Columns** in each period grouping is defined in Preferences - Layout - Table/Graph (see [Setting Table/Graph Defaults Preferences](#)).



Back a page – clicking this button brings you to the previous page of the display period data you are viewing.



Forward a page – clicking this button brings you to the next page of the display period data you are viewing.

Table 2–5 (Cont.) Navigation Arrows

	<p>End – If the last column in the current display period is not in the view, clicking this button brings you to the end of the current display period data.</p> <p>If the last column in the current display period is in the view, clicking this button brings you to the beginning of the next period data.</p> <p>If there are no more next periods to retrieve, clicking this button brings you to the end of the current display period data.</p> <p>The number of Period Display Columns in each period grouping is defined in Preferences - Layout - Table/Graph (see Setting Table/Graph Defaults Preferences).</p>
---	--

- **Graph Icons** – Graph Mode also contains the following icons:

Table 2–6 Graph Icons

	<p>Rescale—adjusts the vertical scale of the graph to distribute lines as appropriate to the data you are viewing.</p>
	<p>Rescale Visible—zooms in to display a more detailed view of the data currently displayed.</p>
	<p>Zoom—toggles between "Zoom In" and "Zoom Out" mode.</p>
	<p>Disable All—hides all points in the stream on the graph.</p>
	<p>Enable All—shows all points in the stream on the graph.</p>
	<p>Configure—lets you pick the substreams you want to show in the graph in the Graph Key. This is especially useful when you have more substreams than keys in the graph.</p>
	<p>View Data Above Arrow—appears when there is data available above current view. Clicking this arrow will adjust graph view to include data that was previously out of the picture.</p>
	<p>View Data Below Arrow—appears when there is data available below current view. Clicking this arrow will adjust graph view to include data that was previously out of the picture.</p>

- **View Tabs** – Toggles between Graph and Table Mode.

The default Oracle Retail VCC graph display is scaled to the highest point in the entire data series, whether or not that point is currently in the user's view. In the case of very large promotions, or when mixed time buckets (daily, weekly, monthly) are displayed in the same time series, the default view shows data for buckets with smaller quantities compressed near the bottom of the graph. This may make it difficult to distinguish the lines from one another. Oracle Retail VCC allows you to readjust the scale to meet your needs.

Note: Oracle Retail VCC automatically rescales the graph after you make any changes to the active items in the Graph Key.

To rescale a graph

1. Click **Rescale** and the following text boxes and buttons appear:

Figure 2–31 Rescale a Graph



2. Adjust the vertical scale of the graph to distribute lines as appropriate to the data you are viewing by entering the maximum and minimum values for the vertical scale on the graph into the edit boxes labeled "Min" and "Max".
3. Click **OK** and the graph is rescaled.

Note: In some instances, the graph scale will only approximate the "Min" and "Max" values you entered to rescale graph. For example, if the "Min" and "Max" values are "0" and "10", respectively, the graph will rescale to those values. However, if the "Min" and "Max" values are "4" and "12", respectively, the graph may rescale to "0" and "20".

The Graph Key (shown below) to the right of the graph indicates which lines are assigned to which substreams for your selected context. By clicking on the colored buttons next to each substream, you can show/hide that substream. (When a substream is hidden, the box turns grey.) Although more than 12 streams can be selected for a group, only 12 streams will be displayed in the applet. Those streams ordered in the top 12 of your group will display.

Figure 2–32 Graph Key



Your comparison mode, available data, and selected stream groups will determine which data streams are visible by default. The 12 streams shown in the column can indicate a combination of both primary and/or secondary streams. Which primary and secondary streams you see depend on the comparison mode you have selected. For example, if you choose as your comparison mode

- Local Current to Local Previous, the primary stream is your local current stream and the secondary stream is your local previous stream.

- Local Current to Partner Current, the primary stream is your local current stream and the secondary stream is your partner's current stream.

Note: Year Ago streams (data streams containing year-ago data for the subtype) can only be viewed if they are editable by the seller or the buyer, but not by both. Year ago streams appear in the secondary streams column regardless of whether they are editable by the seller or the buyer. When displayed in the graph mode, a Year Ago stream appears in the Secondary Stream (right-hand) column and the current version of that Year Ago stream appears in the Primary Stream (left-hand) column regardless of whether it is editable by you or your partner.

- Partner Current to Partner Previous, the primary stream is your partner's current stream and the secondary stream is your partner's previous stream.

In addition, each Graph Key item displays a tool tip identifying its associated substream and comparator when the cursor passes over it.

The **Configure** icon allows you to assign all or some of the substreams that you want to be included in the Graph Key. Simply select the subtype name from the drop-down list next to each line and click **Save**.

The default substreams initially active in the Graph Key are the first twelve substreams of the defined group. (See the Group's Preview screen to see how the group's substreams are ordered within the comparison modes).

Use the Graph's **Configure** utility to temporarily modify the active substream order or list. Graph Key modifications are only retained for the current applet session. You can navigate between Table and Graph, but applying changes in the Context Chooser or moving to a new screen will cause the Graph Key to revert to the default substreams.

If you want the Display Mode to default to the **Streams - View/Edit - Graph** view, you may want to create a specific graph view group in **Preferences - Layout - Table/Graph - Groups** (see [Creating and Editing Groups](#)) or **Company -General Config - Groups** (see [Managing Groups for a Company](#)) to establish the default available substream selections for the Graph Key.

- Click the **Configure** icon. The Graph Key changes to a series of drop-down lists.

Figure 2-33 Graph Key Drop-down Lists

The image shows a dialog box titled "Graph Key Drop-down Lists". It contains 12 drop-down menus, each with a label and a downward arrow. The labels are: "Loc: Sales Fcst Base", "Loc: Sales Fcst Prom", "Loc: Sales Fcst Seas", "Loc: Sales Fcst Totl", "Part: Sales Fcst Base", "Part: Sales Fcst Prom", "Part: Sales Fcst Seas", "Part: Sales Fcst Totl", "Loc: Ship Forecast Base", "Loc: Ship Forecast Promo", "Loc: Ship Forecast Adj", and "Loc: Ship Forecast Total". At the bottom of the dialog are two buttons: "OK" and "Cancel".

2. Choose a subtype from the drop-down list. The list contains all the subtypes for the group (in the **Context Chooser - Display Mode**) that you have selected. Only the subtypes you select will appear in the graph.
3. Click **OK** and the changes appear in the graph.

Note: The subtype names that appear in the drop-down lists are the long names that are given to the subtype when the stream is created in **Configuration - Streams - View**. See [Configuration - Stream Types Tab](#) for details. The names you see in the legend are the short names.

Required Fields

All required fields will be marked with a red asterisk (*). If a required field is left blank and an action button is clicked, an error message requesting that you fill in the required field will appear. Carefully check your screen for any required fields you may have missed to avoid getting error messages.

This chapter covers the following topics:

- [Introduction](#)
- [Using the Right-Click Menu Utility](#)
- [Mass Entry of Data](#)
- [Viewing Data](#)
- [About Period Overlays](#)
- [About Accumulation Rules](#)
- [Adding, Reading, and Deleting Data Stream Comments](#)
- [Editing a Data Stream](#)
- [Creating Aggregates](#)
- [Working with Aggregates](#)
- [Viewing Data in Expand Mode](#)
- [Viewing Data Stream Revision History](#)

Introduction

The VCC user interface allows you to view, edit, and compare data streams. You can view data streams and data stream exceptions in **Table** format or **Graph** format for individual product data streams or entire product categories.

Using the Right-Click Menu Utility

Access to this feature: superadmin, admin, and manager.

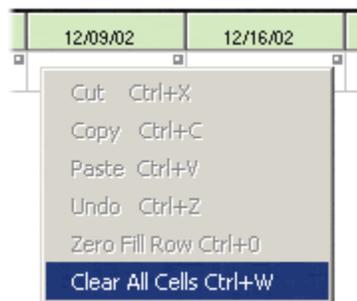
While in Table view, there are options available to you through a right-click pop-up menu. You can cut (ctrl+x), copy (ctrl+c), and paste (ctrl+v) all the cells that are currently in view by selecting the cells you want to copy, or cut, and selecting the action from the right-click drop-down list. You can also Undo (ctrl+z) the previous action, zero-fill a row (ctrl+0), or clear all cells in the table (ctrl+w).

Note: This feature allows you to cut, paste, zero-fill and clear only those cells that you have editing access to. You can, however, copy any cell that is currently in view (including cells for which you do not have editing privileges) to paste into a cell for which you do have editing privileges.

Clear All Cells

Clearing all cells empties the table of data, and replaces it with empty cells. Clear All Cells will not replace previously saved data, only those cells that were modified prior to clicking Save. You do not need to select a particular row to clear all cells, but you must have some cell selected in the Table in order to access the right-click menu with the "Clear All Cells" option.

Figure 3–1 Clear All Cells Option



Note: The option to Clear All Cells is only available in the Data - Mass Entry - Table view, and will not be accessible in View/Edit mode.

Cut / Copy - Paste

To Cut, Copy or Paste using the Right-Click Menu Utility

1. Set your context.
Click **Data - View/Edit**, and click the Table mode tab.
2. When the data stream data appears in table mode, select the cell(s) that you want to cut/copy.

Figure 3–2 Select Cells

	05/13/02	05/14/02	05/15/02	05/16/02	05/17/02	05/18/02
Local Curr						
• POS Forecast (Base)			10.00	10.00	10.00	10.00
• POS Forecast (Prom)			20.00	20.00	20.00	20.00
• POS Forecast (Seas)			30.00	30.00	30.00	30.00
• POS Forecast (Total)			60.00	60.00	60.00	60.00
Partner Curr						
• POS Forecast (Base)			10.00	10.00	10.00	10.00
• POS Forecast (Prom)			20.00	20.00	20.00	20.00
• POS Forecast (Seas)			30.00	30.00	30.00	30.00
• POS Forecast (Total)			60.00	60.00	60.00	60.00
Local Curr						
• Ship Forecast Base	0.00	0.00	10.00	10.00	10.00	10.00
• Ship Forecast Promo			20.00	20.00	20.00	20.00

3. Either right-click you mouse and select the action

Figure 3–3 Cut, Copy, or Paste

	05/13/02	05/13/02
10.00	10.00	10
20.00		20
30.00		30
60.00		60
10.00	10.00	10

or,

use the following keys to perform the actions:

- Ctrl+x – Cut
 - Ctrl+c – Copy
 - Ctrl+v – Paste
 - Ctrl+z – Undo
4. Click into the first editable cell where you want to “start” the paste and right-click paste
 5. Click **Save**

Zero Fill

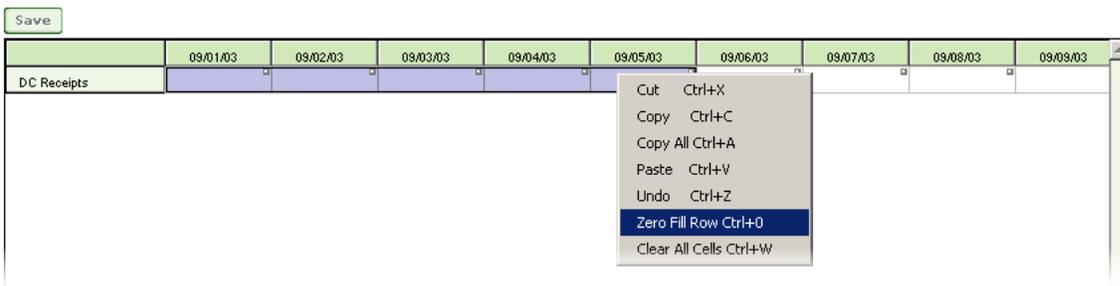
VCC's Data - Mass Entry screen also provides an option which can automatically Zero Out a specific data stream. After you have selected the context, the data stream and the period, the system will present the Zero Out option that will populate that datastream with zero values for all the selected periods.

In previous versions, Oracle Retail VCC would default all values for a selected period to "0." Now, cells default to empty. Cells that are not modified remain empty, unless Zero-Fill is selected.

To apply Zero Fill to your data streams

1. Set your context.
2. Click Data - Mass Entry, and click the Table mode tab. The Mass Entry screen appears
3. Select a leaf level context in the Context Chooser, and pick a Start Date and End Date.
4. Click Set. The table display pane appears.
5. Once the stream is created, you must select a table cell within the Table display pane. The border of the cell you have selected darkens to indicate you have selected it.
6. Right-click to access the pop-up menu.

Figure 3–4 Zero Fill



7. Select Zero Fill Row from the pop-up menu. You may also use Zero Fill by using the keystroke combination Ctrl+0.

The entire row containing the cell you selected will be filled with zeros, even if you previously entered other numbers. This method zeroes-out all data contained in the row.

If you would like to restore the empty cells and eliminate the zeroes you just added to the table, select **Clear All Cells** (ctrl+w) from the right-click menu. The zero values will be replaced with empty cells. For more information, see [Clear All Cells](#).

- The option to Clear All Cells is only available in the Data - Mass Entry - Table view, and will not be accessible in View /Edit mode.

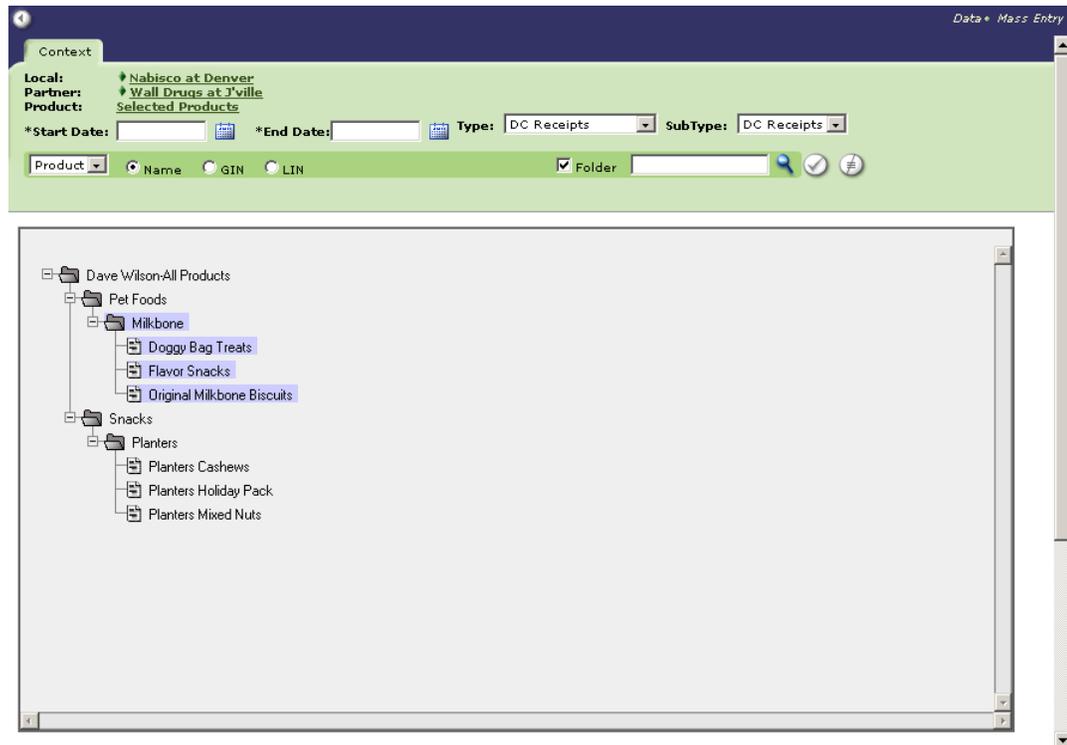
Mass Entry of Data

Access to this feature: superadmin, admin, manager, supervisor, and planner.

Data can be entered for multiple products and multiple folders simultaneously through the Data - Mass Entry screen. When a folder-level product is selected for mass entry, all the leaf-level products that it contains will automatically be selected for mass entry. Data Stream Type and SubType can also be selected for mass data entry.

To use Mass Entry

1. Select **Data - Mass Entry** from the Oracle Retail VCC menu.
2. Select Local and Partner in the **Context tab**.
3. Select the folders or products to enter data for from the Product tree.

Figure 3-5 Mass Entry of Data - Product Tree

4. Choose the Start Date and End Date between which you will enter data for these selected products.
5. Select data stream Type and SubType (optional).
6. Click Set. The Mass Entry table view appears.

Figure 3–6 Mass Entry Table View

	09/01/03	09/02/03	09/03/03	09/04/03	09/05/03	09/06/03	09/07/03	09/08/03	09/09/03
Doggy Bag Treats									
Flavor Snacks									
Original Milkbone Biscuits									
Total									

7. Enter data for the products you selected.
8. Click Save.

Viewing Data

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

You can view data streams in table or graph view for individual products or product categories. Both views allow you to review and compare data values in the following comparison modes:

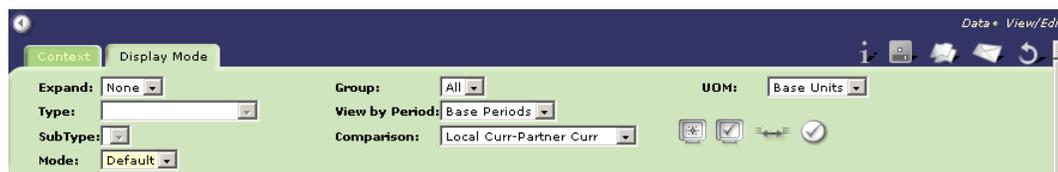
- **Local Current - Local Previous** – compares your current local data stream with your previous local data stream.
- **Partner Current - Partner Previous** – compares your partner's current data stream with your partner's previous data stream.
- **Local Current - Partner Current** – compares your current local data stream to your partner's current data stream.

To view a data stream

1. Select your context.
2. Select **Data - View/Edit** from the Oracle Retail VCC menu. The data stream appears in **Table** or **Graph** format, depending on how you configured your default data stream view in **Preferences - Layout - Data - Defaults** subtab (see [Table/Graph Preferences](#) for details).
3. Click the tab of the view (table format or graph format) that you want.

4. Click Context Chooser - Display Mode.

Figure 3-7 Context Chooser - Display Mode



If you have previously saved Display Mode settings, click the **View saved display modes** icon and a list of your saved display modes appears in the Display pane. Saved Display Modes include

- Stream View – displays in table (default) or graph.
- Group – displays "All" (default) or some other group you have created or have access to.
- View by Period – displays "Base Period" (default) or period overlay you have created or have access to.
- Comparison – displays Local Current - Partner Current (default), Local Current - Local Previous, or Partner Current - Partner Previous
- UOM – displays Base Units (default), Stat Units, Currency, Truckload, or any conversion units you have loaded using the VCC Integrator. For descriptions of the standard Oracle Retail VCC-supplied UOMs, refer to Introduction. For details about creating custom UOMs, refer to the **Oracle Retail VCC Implementor Guide**.
- Expand – when used, displays all the leaf-level items for the selected folder, even items not available for your collaboration. See [Viewing Data in Expand Mode](#).
- Type – displays stream type used for the Expand feature.
- Subtype – displays substream type used for the Expand feature.

The Default Display mode is called "default." For details on how to change your Display Mode default settings refer to [Setting Table/Graph Defaults Preferences](#). In the **Preferences - Layout - Table/Graph - Defaults** screen, you can select any Display Mode you have saved as default.

Highlight the display mode you want in the list and close the list in the **Display** pane. The item you selected is now set as the display mode. Otherwise, follow the steps below.

5. Choose your group from the **Group:** drop-down list.
6. From the **View by Period** drop-down list, select **Base Periods** to display all the base periods for the data stream (the **base period** is the period increment used to create the data stream– usually either weekly or daily), or select any other period overlay available. The periods available depend on how you or your administrator set-up the time periods for the selected data stream. (See [About Period Overlays](#).)
7. Choose your comparison mode from the **Comparison:** drop-down list.
8. In the **UOM** drop-down list, select the unit of measure you want displayed.
9. Click the **Set** icon.

Note: Using the Refresh icon restores the original data stream if you make changes you do not want to save.

About Period Overlays

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

A **period overlay** allows you to view data accumulated across time by fixed, rolling, or telescoping periods.

A fixed period overlay totals the figures in a data stream based on how the overlay was defined by the Oracle Retail VCC system administrator. For example, you may have a monthly overlay or quarterly overlay defined for your Oracle Retail VCC. A bi-weekly overlay would allow you to view figures by two-week totals; a quarterly overlay would allow you to view figures accumulated on a quarterly basis.

A rolling period overlay totals the figures in a data stream across time periods, specified relative to the current date or current time period. For instance, if you created a four-week rolling period overlay, it displays figures that are the sum of the current week and three weeks into the future. After the current week ends, the rolling period advances and the new current week automatically becomes the first week of the overlay. The period overlay in this example always displays figures that are in the current week and three weeks in the future.

Telescoping period overlays are similar to rolling period overlays except the time buckets are aligned relative to the current date or your period hierarchy. For example, if your period hierarchy contains days, fiscal weeks, and fiscal months, you can specify an overlay to display the next seven days, then three weeks, and then six months. The number of periods of each size will be rounded up to break according to your period hierarchy.

Period overlays created through **Company - General Config - Period Overlays** are company specific and once created are accessible by all users of the company. Period overlays cannot be deleted if they are currently in use within the application.

Period overlays created through **Preferences - Layout - Table/Graph - Period Overlays** are available only to the user who created them.

Note: The default period overlay is "Base Period". "Base Period" is your only choice if you have not created any period overlays. For details about how to create period overlays, see [Creating and Editing Period Overlays](#).

About Accumulation Rules

Associated with each data stream is an **Accumulation Rule**, which is a fixed attribute of the data stream that indicates how it behaves when aggregated. There are three accumulation rules that can apply to a data stream: **movement**, **balance**, and **measure**.

- A Movement stream can accumulate data across context dimensions (product, partner, and local) and across time dimensions (period overlays).

When viewed in an aggregate context, data is totaled across each dimension chosen at folder level.

When viewed in an aggregate period (period overlay), data is totaled across the period defined.

Any kind of exception criteria can be created for a Movement stream.

- A Balance stream can accumulate data across context dimensions (product, partner, and local) but not across time dimensions.

View data across context dimensions by establishing aggregate streams (see [Managing Company Aggregates](#)) for combinations of context leaf and folder levels.

When a Balance stream is viewed in a period overlay, the value displayed will be the value listed in either the first or the last period contained in the range of the periods specified in the period overlay. (For each company, its administrator will specify whether to use the first or the last period. See [Creating and Editing Period Overlays](#).)

A "sum" exception criteria on Periods cannot be created for a Balance stream.

- A Measure stream can neither accumulate data across context dimensions (product, partner and local) nor across time dimensions (period overlays).

Unlike the aggregates formed for Movement and Balance streams, Measure stream aggregates are not computed by summing the individual items included in the selected aggregate level folder.

Measure stream aggregates will be editable according to the current Stream Type configuration attributes for 'Edit By' and 'Edit When'. Values can be entered manually or can be data loaded using the Integrator.

Measure streams aggregates cannot be disaggregated.

Similar to the aggregates stored for Movement and Balance streams, both current and previous values are stored at the aggregate level for Measure streams.

When a Measure stream is viewed in a period overlay there will be no values displayed.

A "Sum" exception criteria on Periods cannot be created for a Measure stream.

Adding, Reading, and Deleting Data Stream Comments

Access to this feature: superadmin, admin, manager, supervisor, and planner.

Movement and Balance aggregates are editable if they adhere to the current Stream Type configuration attributes for 'Edit By' and 'Edit When'. (Values can be entered manually or can be data loaded using the Integrator.)

AND

there is a Disaggregation Profile existing for the specified periods.

OR

if no periods for the specified stream type have a Disaggregation Profile, and the Proportional Disaggregation option is set to "Yes" (in Company - General Config - Preferences).

Oracle Retail VCC allows you to add a comment to any data stream item in table mode. This is useful if you want to add a comment to a field you have changed.

Comments are attached to a context and data stream item type for that period. They remain until explicitly deleted. They are not removed automatically when the data item changes.

Data stream item comments are designated by a solid blue square in the data stream item cell (in table mode). When the cursor passes over the blue square, the comment appears in a tooltip.

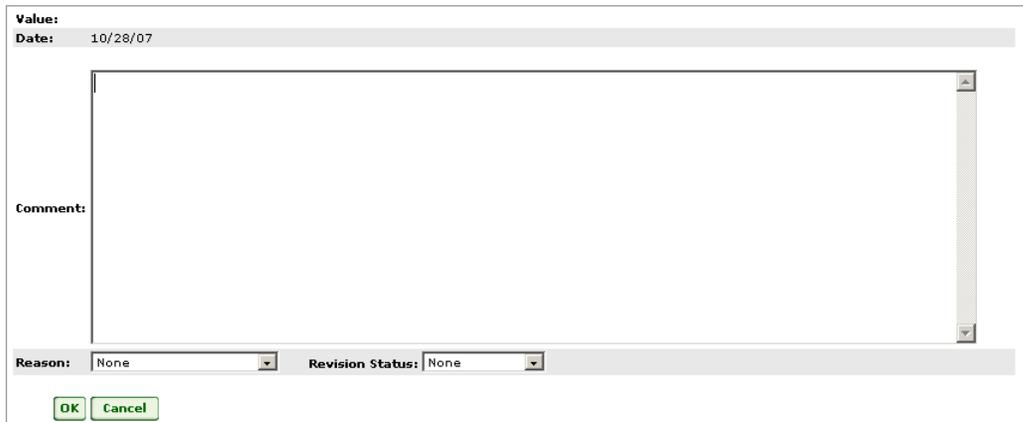
In graph mode, comments are designated by a purple circle. When the cursor passes over the purple circle, the comment appears in a tooltip text box next to the stream name.

Note: Data stream comments are not visible in Revision History.

To add or edit a comment to a data stream item

1. Select your context.
2. Click the **Context Chooser Display Mode** and select one of the following data stream comparison types from the **Comparison:** drop-down list.
 - Local Current - Local Previous
 - Local Current - Partner Current
 - Partner Current - Partner Previous
3. Click on the gray box (blue box if comments already exist for the cell) in the upper right corner of the cell. A comment input area appears in the **Display** pane.

Figure 3–8 Comment Input Area on the Display Pane



The comment screen displays

- Value contained in the cell
- Current Date
- Comment text box
- Reason drop-down list (a drop-down list of adjustment reasons)
- Revision Status drop-down (a drop-down status list)

Note: The Revision Status drop-down is only available at a leaf-level context.

4. Enter a comment and select an adjustment reason from the drop-down list. Comments are limited to 100 characters.
5. Select a Revision Status, if applicable.
6. Click **OK** to save changes and return to the **Table** view. Click **Cancel** to cancel changes and return to the **Table** view.

After a comment is added, the gray box turns blue.

7. Once back in Table view, click **Save** at the top of the **Display** pane to save the comment.

Note: You can only delete a comment while in the "Base Units" UOM. The other UOMs are read-only.

To read a comment, rest the cursor on the blue box in the upper right corner of the cell. The comment text appears within a yellow tooltip.

To delete a comment

1. Access the comment by clicking the blue square.
2. Delete all text and spaces associated with the comment.
3. Set the **Reason** to "<none specified>."
4. Click **Save**.

Note: Both you and your partner can read a comment you create. However, only you or your company users can delete or modify it.

Editing a Data Stream

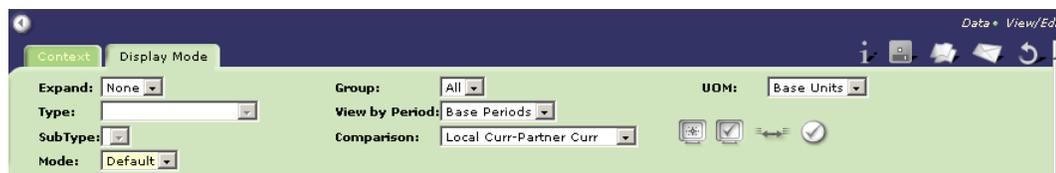
Access to this feature: superadmin, admin, manager, supervisor, and planner.

Oracle Retail VCC allows you to edit your local data stream only. You cannot edit a data stream received from a trading partner.

To edit a local data stream in table format

1. Select your context.
2. Click **Context Chooser - Display Mode** and choose your settings with regards to groups, time period, comparison type, and UOM from the drop-down lists.

Figure 3–9 Context Chooser - Display Mode



3. Click the **Set** icon.
4. Select **Data - View/Edit** from the Oracle Retail VCC menu and click the **Table** tab when the stream appears in the **display** pane.

Figure 3–10 Display Pane Grid

Save UOM: Base Units Test Comparison: Local Curr-Partner Curr

	10/01/02	10/02/02	10/03/02	10/04/02	10/05/02	10/06/02	10/07/02	10/08/02	10/09/02
Local Curr									
POS Forecast (Base)	2.00	4.00	6.00	2.00	4.00	6.00	2.00	4.00	6.0
POS Forecast (Prom)									
POS Forecast (Seas)									
POS Forecast (Total)	2.00	4.00	6.00	2.00	4.00	6.00	2.00	4.00	6.0
Partner Curr									
POS Forecast (Base)									
POS Forecast (Prom)									
POS Forecast (Seas)									
POS Forecast (Total)									
Local Curr									
Ship Forecast Base									
Ship Forecast Promo									
Ship Forecast Adj									
Ship Forecast Total									
Partner Curr									
Ship Forecast Base									
Ship Forecast Promo									
Ship Forecast Adj									
Ship Forecast Total									
Yr-Ago POS (Base)									

Table Graph

5. Double-click on an editable cell to change a value or add a comment.
6. Click **Save** and the changes to the stream are saved.
7. The message "Successfully Saved" appears below the table. This indicates that your data was saved successfully.

Figure 3–11 "Saved Successfully" Message

Yr-Ago POS (Promo)					
Yr-Ago POS (Total)					
POS (Base)					
POS (Promo)					
POS (Total)					
Local Curr					
DC Receipts	16.00	8.00	40.00	40.00	40.00
DC Shipments	16.00	8.00	40.00	40.00	40.00
Partner Curr					
DC Inventory	16.00	8.00	40.00	40.00	40.00
DC Receipts	16.00	8.00	40.00	40.00	40.00
Finished Goods Inv					

Table Graph **Successfully**

A colored diamond (process indicator) appears to the left of the relevant folder or stream name to indicate whether aggregates, exceptions, or neither have been processed. Indicator colors include:

Blue – Data has not been processed for either exceptions or aggregates. Appears whenever you make a change to a data stream.

Yellow – Data has been processed for exceptions only.

Orange – Data has been processed for aggregates only.

For details on processing exceptions, see [Managing the Scheduler](#).

Creating Aggregates

Access to this feature: superadmin, admin, and manager.

Oracle Retail VCC allows you to aggregate data for local, partner, and/or product folder-level contexts.

To aggregate data for local, partner, and/or product folder-level contexts

1. Select your context.
2. Click **Data - View/Edit**.
3. If no aggregate data exist for your selected context, the following message appears:

Figure 3–12 "No Aggregate Data" Message

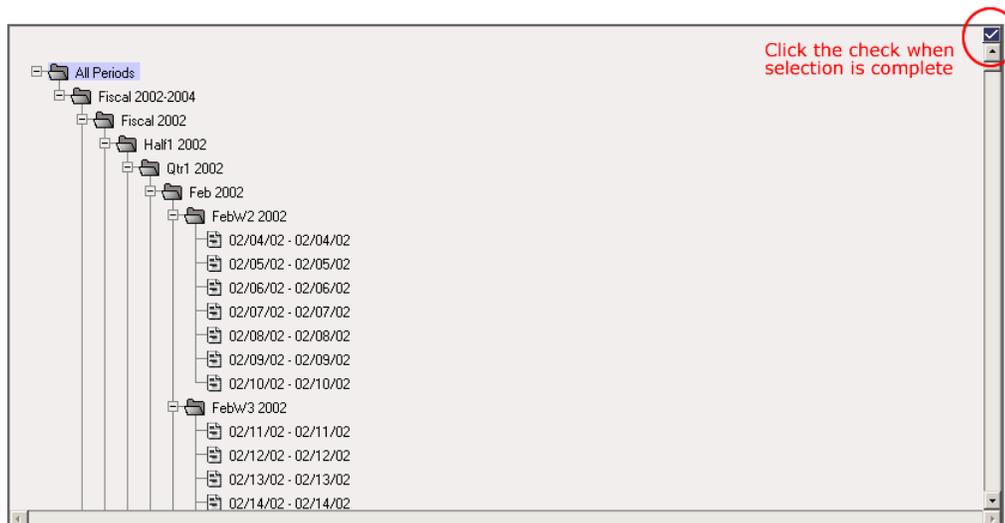
No aggregate data available at this context.

Create Aggregates

Note: If no **Create Aggregates** button appears, it is because you cannot create aggregates when a context folder is at root level. Check your context to verify that no "All Locations," "All Partners," or "All Products" are selected.

4. Click **Create Aggregates**.
5. If aggregates can be created, the **Context Chooser - Context** displays a **Period Link**. Click the link to choose the time period(s) for the aggregates.
6. Select the time period from the **Period Tree** screen, and Click the "Create Aggregates" icon to begin creating aggregates.

Figure 3–13 Period Tree Screen



7. A message appears telling you that the aggregates are being created. Check **Monitor - Jobs** to make sure your job request has finished running.

Note: If the "no aggregate data exists for your selected context", message reappears when you return to **Data - View/Edit**, the reason could be that no data exists for the selected periods; or, if the job has not finished, data does not exist for all the selected periods (in which case, click the **Refresh** icon a few times and the aggregates should appear). You can see if the job is still processing by selecting **Monitor - Jobs** from the Oracle Retail VCC menu.

If an aggregate data stream existed previously for a context is removed and then recreated at a later date, you must run "Recalc Aggs" to display aggregated data.

Working with Aggregates

Access to this feature: superadmin, admin, manager, supervisor, and planner. Reviewer cannot edit (read only).

There are three ways in which you can disaggregate data. For information on how to create aggregates, see [Creating Aggregates](#). This section covers

- See [Using a Disaggregation Profile](#).
- See [Using Proportional Disaggregation](#).
- See [Using Period Overlays](#).

Using a Disaggregation Profile

Two items must be created before you can use a disaggregation profile in **Data - View/Edit**:

- aggregates (see [Creating Aggregates](#))
- disaggregation profile (see [Managing Company Data Stream Disaggregation](#).)

Once those exist, you can edit the aggregate as you would any other stream (see [Editing a Data Stream](#)).

When you save your changes, the value of the aggregates are saved and the values of each leaf-level item are updated. Values for related aggregates are updated when either of the tasks, "Process Leaves and Update Aggregates" or "Process Aggregates", are run through the Scheduler.

Using Proportional Disaggregation

Proportional disaggregation allows you to create data at a folder level that will proportionally disaggregate to a leaf level without having to create disaggregation profiles. This feature determines the proportional value of each leaf to the current aggregate and allocates the new value using the same proportions.

For example, if the original aggregate value is 60 and there are three leaf-level items in the aggregate (Leaf 1 = 10, Leaf 2 = 20, and Leaf 3 = 30), the proportional value of each leaf is: Leaf 1 = .16, Leaf 2 = .33, and Leaf 3 = .50.

When you adjust the aggregate value to, say, 70, the leaf values increase proportionally to the current value (i.e., Leaf 1 = 11.3, Leaf 2 = 23.2, and Leaf 3 = 35).

If there is no data in the selected aggregate and you change the aggregate value to, say, 60, that aggregate value is distributed evenly across all collaboration items in the aggregate. So, if you are aggregating on a product folder that has three leaves, and you collaborate with your partner on all three leaves, each leaf is changed to 20. If, however, you only collaborate on two items in a product folder that contains three items, only the leaves that you collaborate on are changed. (In this case each collaboration item would change to 30.)

Note that if your aggregate values add up to zero, you will receive an error message, since it is impossible to aggregate on zero (i.e., Leaf 1 = -30, Leaf 2 = 30, and leaf 3 = 0). In such an instance, Oracle Retail VCC will display the following error message: **Some cell data could not be saved. Divide by zero error. Click Refresh to get latest stream data.**

To activate Proportional Disaggregation, select either "Self" or "Total" from the drop-down lists in the **Proportional Disaggregation** section. See [Managing Company General Preferences](#) for details.

As with using disaggregation profiles, you must first create aggregates (see [Creating Aggregates](#)). Then you can edit the aggregate as you would any other stream (see [Editing a Data Stream](#)).

Using Period Overlays

Oracle Retail VCC allows you to disaggregate daily databases (from week to day) when in a fixed weekly period overlay at leaf- or folder-level contexts. However, the following conditions apply:

- You must have already created a disaggregation profile for context
- Your period overlay must be defined as running from Monday through Sunday
- This is only available for movement streams

Viewing Data in Expand Mode

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

Oracle Retail VCC allows you to select a combination of folder and leaf-level context items to display data. When your context contains a folder-level component the **Display** pane normally shows the total of all the items in the folder. The "Expand" function displays the figures for each item within the folders you selected, except items not available for your collaboration. You can now select combinations of leaf and folder levels, such as two folders and one leaf, or two leaves and one folder. However, at least one folder must be selected in order to use the Expand feature.

The Display pane shows the data stream values for each of the active items currently in the folder. For inactive items, there will be no values shown.

Expand Mode is available in the **Data - View/Edit Display Mode** screen when multiple context items (Product, Partner, or Local) are at a folder level.

The selected Comparison Mode affects what is displayed. Only the Primary comparator is in effect while in Expand Mode. For example,

- In the Partner Current-Partner Previous Comparison mode, only the Partner Current comparator is in effect in Expand Mode. This is used to view (read-only) the folder items in a data stream that only your partner can edit.

- In either the Local Current-Partner Current or Local Current-Local Previous Comparison modes, only the Local Current comparator is in effect. You will use this when you want to view/edit folder items in a data stream where you have edit privilege.

For your active items, you can view/edit the data and enter comments. Those items not yet available to you will be viewable but not editable.

To expand a folder-level item

1. Click **Data - View**.
2. Select your context. Click the "Set" icon.
3. Click **Context Chooser - Display Mode**. When the Display Mode screen appears, select the folder level item (Local, Partner, or Product) from the "Expand:" drop-down list.

Figure 3–14 Context Chooser - Display Mode



4. Choose the data stream "Type:" and "Subtype:" from the drop-down lists.
5. Click the "Set" icon.
6. Click **OK** and your data stream view in the **Display** pane shows all the items in the folder component of your context.

Note: Make sure to select the appropriate comparison mode for viewing the selected data stream. Oracle Retail VCC allows you to compare Partner Curr-Partner Prev, Local Curr-Local Prev, and Local Curr-Partner Curr data with the Display Mode tab's Comparison drop-down list.

Figure 3–15 Display Pane Grid

Save UDM: Base Units Test Comparison: Local Curr-Partner Curr

	10/01/02	10/02/02	10/03/02	10/04/02	10/05/02	10/06/02	10/07/02	10/08/02	10/09/02
Local Curr									
POS Forecast (Base)	2.00	4.00	6.00	2.00	4.00	6.00	2.00	4.00	6.0
POS Forecast (Prom)									
POS Forecast (Seas)									
POS Forecast (Total)	2.00	4.00	6.00	2.00	4.00	6.00	2.00	4.00	6.0
Partner Curr									
POS Forecast (Base)									
POS Forecast (Prom)									
POS Forecast (Seas)									
POS Forecast (Total)									
Local Curr									
Ship Forecast Base									
Ship Forecast Promo									
Ship Forecast Adj									
Ship Forecast Total									
Partner Curr									
Ship Forecast Base									
Ship Forecast Promo									
Ship Forecast Adj									
Ship Forecast Total									
Yr-Ago POS (Base)									

Table Graph

The table rows are displayed in alphanumeric ascending order in Expand mode. The table display includes a "Total" row. The Total row totals all the data stream values displayed in the "Expanded" view. The totals are updated automatically whenever any value in the data stream is modified.

Note: The "Total" row is included in the CSV "export" file. For more information on exporting data, see [General Icons](#).

Figure 3–16 Display Pane Grid with Totals

Save UDM: Currency Test

	08/24/02	08/25/02	08/26/02	08/27/02	08/28/02	08/29/02	08/30/02	08/31/02	
Planters Mixed Nuts									
Planters Cashews									
Planters Holiday Pack									
Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

"Total" Row

Table

Viewing Data Stream Revision History

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

If a data stream's attribute "Maintain Revision History" is activated, Oracle Retail VCC maintains a complete revision history of specific products, partners, and time periods for that data stream. The data stream history maintains a record of each change made to a particular data stream.

Note: Data stream comments are not visible in Revision History.

To view a data stream's revision history

1. Select **Data - Revision History** from the Oracle Retail VCC menu.
2. Click **Context Chooser - Select Context** and select your context.
3. The **Revision History** screen for the data stream appears in the **Display** pane.

Figure 3–17 Revision History Screen

Displaying 1-10 of 12

	Creation Date	Stream Type	Company	User Name
	08/13 20:00:00	Shipment Forecast	Speedy Rx	Pat White
	08/13 20:00:00	POS Forecast (Units)	Speedy Rx	Pat White
	08/13 20:00:00	Shipment Forecast	Nabisco	Dave Wilson
	08/13 20:00:00	DC Withdrawal Fcst	Nabisco	Dave Wilson
	08/13 20:00:00	POS Forecast (Units)	Nabisco	Dave Wilson
	02/04 19:00:00	Shipment Forecast	Nabisco	integrator
	02/04 19:00:00	POS Forecast (Units)	Nabisco	integrator
	02/04 19:00:00	POS Forecast (Units)	Nabisco	integrator
	02/04 19:00:00	POS Forecast (Units)	Speedy Rx	integrator
	02/04 19:00:00	Shipment Forecast	Nabisco	integrator

1 2 [Next](#)

The listings on this screen may be sorted by Creation Date, Stream Type, Company, or User Name by clicking on the column headings. Under the "View" icon, click a colored dot to view the corresponding data stream that you want to view.

4. The historic dates and values for the time period selected appear in the **Display** pane. You can view the data in table or graph format.

Figure 3–18 Display Pane Grid with the "Return to List" link

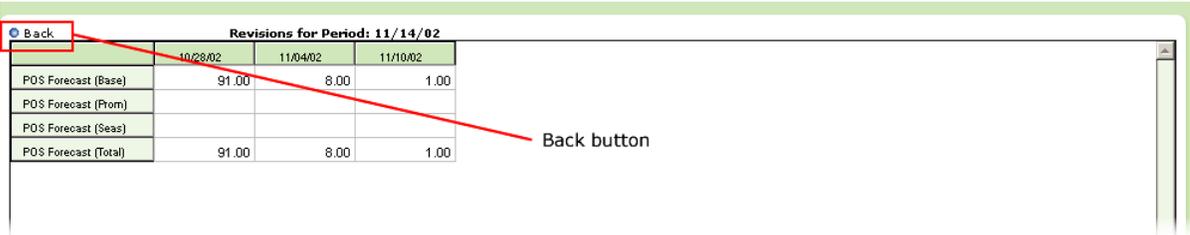
Return to list	Data Stream created on 11/10/02 05:20:10 by amudha (non-local buyer)									
	11/11/02	11/12/02	11/13/02	11/14/02	11/15/02	11/16/02	11/17/02	11/18/02	11/19/02	11/20/02
POS Forecast (Base)	22.00	1.10	-11.00	1.00	10.00	10.00	4.00	1.00	23.00	34.00
POS Forecast (Prom)										
POS Forecast (Seas)										
POS Forecast (Total)	22.00	1.10	-11.00	1.00	10.00	10.00	4.00	1.00	23.00	34.00

Return to List button

Click on a Column Heading

5. Click on a column heading to view all changes made for that period. The headings show the dates when changes were made.

Figure 3-19 Display Pane Grid with the "Back" Link



- 6. Click the **Back** button (shown above) to return to the **Revision History** pane.
- 7. Click the **Return to List** button (shown above) to return to the **Revision History** pane.

This chapter contains the following topics:

- [Introduction](#)
- [Retrieving Extracted Data](#)
- [Extracting Master Data](#)
- [Extracting Other Data Types](#)
- [Extracts File Formats](#)

Introduction

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

The **Extracts** tool allows you to obtain the following data items in your Oracle Retail VCC's database as a text file that you then can process using any other third-party tool.

- Master Data – including Location, Partner, Product, and Period Hierarchies, as well as Collaboration Products.
- Other – including Collaboration Items, Price profiles, Exception Criteria, Events, Exceptions, Exception Criteria, Disagg. Profiles, Disagg. Factors, Metrics, Supply Policies, and Demand Policies, based on modules assigned to your company.

To use this feature, you must

1. Configure Extracts using the Oracle Retail VCC configuration tool. For details on configuring the Oracle Retail VCC Servlet, see the *Oracle Retail VCC Installation and Configuration Guide*.
2. Schedule the event to perform extract. For details on scheduling events, see [Managing the Scheduler](#).
3. Optionally, define the format for extracted files. For details see the *Oracle RetailVCC Implementor Guide*.

Once you or the system administrator completes these procedures, you can use the **Extracts** tool by selecting **Extracts** from the Oracle Retail VCC menu.

Retrieving Extracted Data

To extract specific data, you must specify a context for extraction. The **Extracts** tool obtains the data at the time the extraction event is scheduled. When the data you requested is processed, it is available to you as a hyperlink in compressed (zip) format from the **Extracts - List** screen. Click the link and save the data on your computer.

The **Extracts - List** screen contains the following:

- **Delete** – deletes an extraction job (access to this feature is limited to superadmin, admin, manager, and supervisor). Click the Delete icon to select/deselect all items on the current page to be deleted. Click the individual check box to select/deselect that item to be deleted.
- **Extract Type** – extract types: Master Data, or Other (modular data)
- **View/Edit** – drilldown dot that allows you to examine extract details
- **Local** – the local location for the retrieval file
- **Partner** – the partner location for the retrieval file
- **Product(s)** – name of the product or product folder included by the extracted file
- **Download** – displays "Scheduled" or a links to a file download
- **Period** – shows the time period
- **Last Executed** – date time stamp for when the Data Extract was last executed
- **Override Execute Time** – overrides the execution time for job processing
- **Exception Status** – column can contain multiple exception statuses. These include: Active, Dismissed, Escalated, In-Process, Obsoleted, Resolved, Supersedes, Superseded, Unresolvable, Auto Dismissed, Auto Escalated, Auto Incomplete, Auto In-Process, Auto Resolved, Auto Unresolvable. See [Exceptions](#) for status definitions.

Note: One or more of the columns described above may be hidden depending on your settings in Preferences - Layout - Lists - Extracts.

Note: You can arrange the order of the columns to suit your needs. For details, see [Setting List Screen Preferences](#).

Extracting Master Data

To extract specific master data, you specify the master data context and the **Extracts** tool obtains the master data at the time the retrieval event is scheduled. When the master data you requested is processed, it is available to you as a hyperlink in compressed (zip) format from the **Extracts** screen. Click the link and save the data file on your computer.

About Repeat Frequency

Each extraction type contains a Repeat Frequency option. Setting up a Repeat Frequency involves specifying

- **Dates** – dates during which the extract will be performed. Start Date defaults to the current date, and End Date is optional. A specific time of day can be set, or the extract can be run at "Any Time".
- **Recurrence** – determines the frequency at which the report is generated. The recurrence drop-down includes: Once, Always, Daily, Weekly, and Monthly. If you opt to "Always" extract, you will not be able to specify a Start At time, since the extract will run every time the corresponding scheduler job is run. A perpetually running report can be stopped by supplying an End Date at which it will expire, or by deleting the report from the List.

Time – the time of day that you wish to extract data. This option does not appear when recurrence is set to "Always". The default setting, "Start Any Time", allows the extraction to occur as soon as the scheduler is run that day. Selecting the **Start At** radio button allows you to specify an exact time of day to run the extract.

Note that reports will only be processed when the Scheduler runs.

Figure 4–1 Repeat Frequency

The screenshot shows a 'Repeat frequency' dialog box with the following fields and options:

- Dates-**: Start Date: 10/26/03 (mm/dd/yy), End Date: (mm/dd/yy)
- Recurrence:**: Monthly (dropdown), * Day of every month(s). (radio button selected), The First Sunday of every month(s). (radio button unselected)
- Time -**: Start Any Time (radio button selected), Start At: (HH:mm) (radio button unselected)

To request master data

1. Select the appropriate Folder level Company Location, Partner Location, Product from the Context Chooser, and Period from the Create Tab, for which the Extract request is to be created.
2. Click **Extracts - Create**. The Create screen appears.
3. Select the **Master Data** radio button for Retrieval Type.

Figure 4–2 Create Screen

The screenshot shows the 'Create' screen for Extracts with the following fields and options:

- Context**: Local: Dave Wilson-All Locations, Partner: Dave Wilson-All Partners, Product: Dave Wilson-All Products
- Product**: Product (dropdown), Name (radio button unselected), GIN (radio button unselected), LIN (radio button unselected), Folder (checkbox checked)
- Extract Type**: Master Data (radio button selected), Other (radio button unselected)
- Type**: Product Hierarchy (dropdown)
- Filename**: (text field)
- Character Set**: ASCII (dropdown)
- Directory Path**: C:\Program Files\Syncreal\integrator\exports\ret
- Repeat frequency**: Start Date: 10/26/03, End Date: (mm/dd/yy), Recurrence: Monthly, Day of every month(s), The First Sunday of every month(s), Time: Start Any Time, Start At: (HH:mm)

4. Select the master data Type (Location Hierarchy, Partner Hierarchy, Product Hierarchy, Period Hierarchy, or Collaboration Products).
5. If the Include Current Folder control is checked, the output will include the specification for the current folder. If un-checked, the output will include all the items within the current folder, but not the folder itself.
6. If you do not enter a Filename, your file will be given a default filename. For example,

```
<username>_<xxxx>.dat
```

where <username> would be, for example, "Dave_Wilson" and <xxxx> would be, depending on the Extraction type, as follows:

- Period – "per"
- Product – "prod"
- Location – "loc"
- Partner – "part"
- Collaboration Product – "clp"

So, if you were retrieving a period hierarchy, the default filename would be dave_wilson_per.dat, and the file would be contained in a.zip file named, dave_wilson_per.zip.

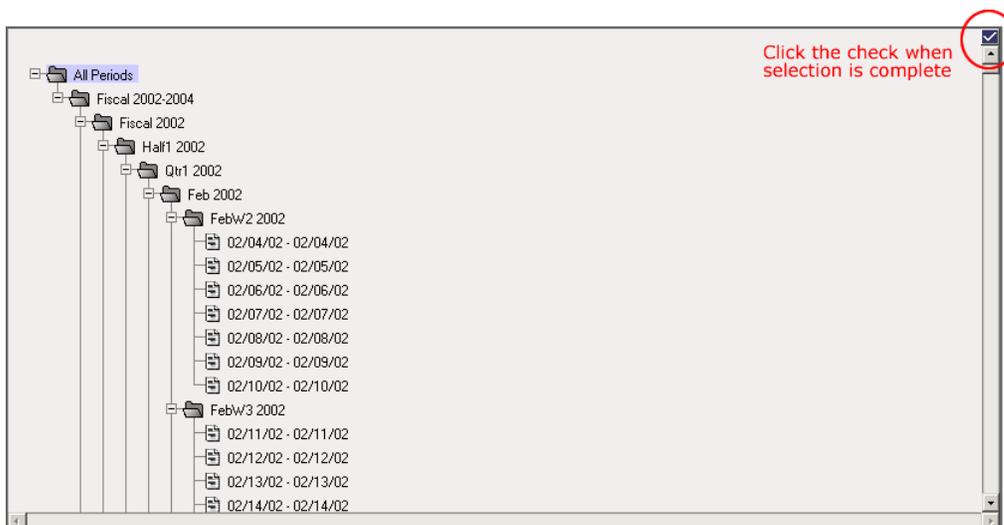
You can enter a name for the file in the Filename field (e.g., Myfile) and the file would be Myfile.dat, and the .zip file would be Myfile.zip.

Note: In case of non-ASCII characters in the username, the default filename is converted to a temporary filename that contains a time stamp in the format, temp1023806054789.dat. The .zip file temporary filename (with time stamp) format is temp1023806054789.zip.

7. Enter a Time and or an End Date. Start Date will default to today's date, and is the only required date field.
8. Configure the Repeat Frequency options, which allow repetitive processing of the same job. The default is "Once", but the job can also be scheduled to run daily, weekly, monthly, or always. For more information on Repeat Frequency, see [About Repeat Frequency](#).
9. If you selected "Period Hierarchies" from the Type drop-down, select a period by clicking the **Period** link and selecting the period from the **Period Tree** screen.

After selecting the period, click the **checkmark** in the top right-hand corner of the **Period Tree** screen to close the tree.

Figure 4–3 *Period Tree*



10. Select the language Character Set the extracted file will contain. Options include: ASCII, UTF-8, UNICODE, and SJIS.

- The Directory Path field is available to superadmin users. This field defaults to the path designated in the VCC Configuration - Client tab, under File Path. This default path can be overwritten for individual extracts by entering a new path where you wish the file to be stored.

Note: If no path is specified in the VCC Configuration dialog box, you will not be able to create an extract request, and Oracle Retail VCC will display an error message upon accessing the Extracts screen.

- Click **Save**. The data stream request appears in the **Extracts** pane. After processing, a hyperlink is available to access the data stream.

To delete a file that has been extracted with the Extracts tool, check the check box next to the stream that you want to delete. If you delete it directly from your system directory and try to extract the file again from the **Extracts** screen, you will receive an error message.

Extracting Other Data Types

To extract other types of data (e.g., Collaboration Items, Disagg. Profiles, Price Profiles, Disagg. Factors, Price Profiles, Exception Criteria, Event Promotions, Exceptions, Metrics, Supply Policies, and Demand Policies), specify the data's context and the **Extracts** tool will obtain that data at the time the retrieval event is scheduled. When the data you requested is processed, it is available to you as a hyperlink in compressed (zip) format from the **Extracts** screen. Click the link and save the data file on your computer.

Note: You must configure the format file to extract data based on the desired file format and configuration in order to extract data. Only Event and Exception Criteria do not need this configuration. See the *Oracle Retail VCC Implementor Guide* for details.

To request other data types

- Set your context.
- Click **Extracts - Create**.
- When the **Create** screen appears, select the **Other** radio button.

Figure 4-4 Create Screen

The screenshot shows the 'Create' screen with the following details:

- Extract Type:** Master Data Other
- Type:** Collaboration Items
- Filename:** [Empty text box]
- Character Set:** ASCII
- Directory Path:** C:\Program Files\Syncre\integrator\exports\ret
- Repeat frequency:**
 - Dates:** Start Date: 10/26/03 (mm/dd/yy), End Date: [Empty text box] (mm/dd/yy)
 - Recurrence:** Monthly, Day [] of every [] month(s), The First [] Sunday [] of every [] month(s).
 - Time:** Start Any Time, Start At: [Empty text box] (HH:mm)
- Buttons:** Save, Cancel

4. Select the data Type (e.g., Collaboration Items, Disagg. Profiles, Price Profiles, Disagg. Factors, Price Profiles, Exception Criteria, Event Promotions, Exceptions, Metrics, Supply Policies, and Demand Policies)
5. For Exception Criteria, there is an additional control for Extract Changes Only. If selected, the output will be the net changes, including both adds and deletes, since the last time the extract was run. If un-selected, the output will be all the current exception criteria.
6. If you do not enter a Filename, your file will be given a default filename. For example,

<username>_<xxxx>.dat

where <username> would be, for example, "Dave_Wilson" and <xxxx> would be, depending on the Extraction type, as follows:

- Collaboration Data – "cirt"
- Price Profile – "pprt"
- Exceptions – "exrt"
- Exception Criteria – "ecrt"
- Demand Policy – "dprt"
- Supply Policy – "rprt"
- Events Promotions – "pert"

So if you were retrieving a collaboration item, the default filename would be dave_wilson_cirt.dat, and the file would be contained in a .zip file named, dave_wilson_cirt.zip.

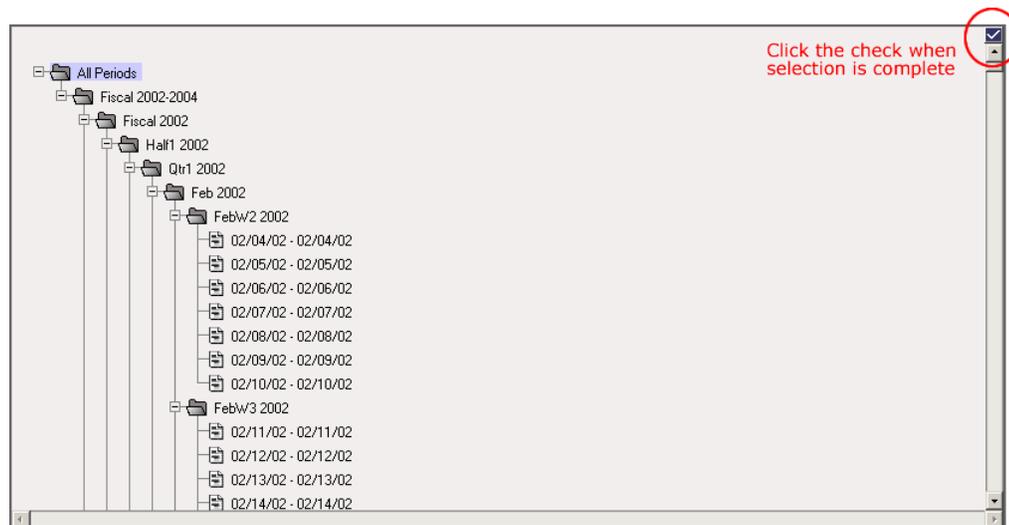
You can enter a name for the file in the Filename field (e.g., Myfile) and the file would be Myfile.dat, and the .zip file would be Myfile.zip.

For Events Promotions and Exception Criteria, the following files are extracted

- Myfile_pert.xml
- Myfile_ecrt.xml
- Myfile_pert.zip
- Myfile_ecrt.zip

Note: In case of non-ASCII characters in the username, the default filename is converted to a temporary filename that contains a time stamp in the format, temp1023806054789.dat. The .zip file temporary filename (with time stamp) format is temp1023806054789.zip.

7. Enter a Time and or an End Date. Start Date will default to today's date, and is the only required date field.
8. Configure the Repeat Frequency section, which allows the repetitive processing of the same job. The default is "Once", but the job can also be scheduled to run daily, weekly, monthly, or always. For more information on Repeat Frequency, see [About Repeat Frequency](#).
9. For Disagg. Profiles, Disagg. Factors, Price Profiles, Exception Criteria, Event Promotions, and Exceptions, select the period by clicking the **Period** link and selecting the period from the **Period Tree** screen.

Figure 4-5 Period Tree

After selecting the period, click the **Checkmark** in the top right-hand corner of the **Period Tree** screen.

For Disagg. Profiles, Disagg. Factors, and Exceptions, you can choose either "Fixed", as described above, or "Rolling" periods. For rolling periods enter the **Start Period** and **End Period** .

10. For Events only, an optional On or After date field is available. By selecting a date here, you can specify that data beginning on and after a certain date be extracted. This will exclude any data prior to the date specified.
11. For Exceptions and Events, the Created by drop-down allows you to select which data you wish the file to contain. If you select Partner, the data extracted will only contain stream data entered by your partner. Likewise, selecting Local will give you a file containing only locally created streams. If you select Both, your file will contain both your and your partner's data.
12. If you are extracting Exceptions, select the Exception Status(es) to be extracted. Multi-select by holding down the Shift and Ctrl keys.
13. Select the language Character Set the extracted file will contain. Options include: ASCII, UTF-8, UNICODE, and SJIS.
14. The Directory Path field is available to superadmin users. This field defaults to the path designated in the VCC Configuration - Client tab, under File Path. This default path can be overwritten for individual extracts by entering a new path where you wish the file to be stored.
15. If no path is specified in the VCC Configuration dialog box, you will not be able to create an extract request, and Oracle Retail VCC will display an error message upon accessing the Extracts screen.
16. Click **Save**. The data stream request appears in the **Extracts** pane. After processing, a hyperlink is available to access the data stream.

To delete a file that has been extracted with the Extracts tool, check the check box next to the stream that you want to delete. If you delete it directly from your system directory and try to extract the file again from the **Extracts** screen, you will receive an error message.

Extracts File Formats

The **Extracts** tool produces a zip file. When you extract the zip file, the file name, by default, is `username_<+++>.dat`, which is contained inside the zip file, and the zip file name is `username_<+++>.zip`. For details on configuring Extracts, see the *Oracle Retail VCC Implementor Guide*.

The default format of the data extracted in the `username_<+++>.dat` file is translated from Oracle Retail VCC Configuration/Extractor Configuration for the various extractors contained in Extracts.

Depending on your choice, the output file configuration can be modified in such ways as file format, column definitions, etc.

Exceptions

This chapter contains the following topics:

- [Introduction](#)
- [Viewing Exceptions and Exception Data](#)
- [Managing Data Stream Exceptions](#)
- [Creating and Viewing Exception Comments](#)
- [Exception Inbox Filter and Search Features](#)

Introduction

Data stream exceptions are differences between two data streams, or between two versions of the same data stream, or a stream and a fixed value that exceed the threshold you set for a specific context (locations, partner, product, and period).

Data stream exceptions appear in the **Exceptions - Inbox** tabs (individual, group, partner, or external) as data streams are received and processed from your trading partners. You can receive and process data streams during off-peak hours or receive and process them as they arrive in real time. In any case, once the data stream is processed, generated exceptions appear in the inbox based on the context you have selected. Exceptions you have viewed are highlighted in yellow.

Along with viewing basic individual and group exception information described below, the Inbox allows you to

- View the data streams that triggered the exception(s), view the exception's status history, and view the criteria that triggered the exception, see [Viewing Exceptions and Exception Data](#).
- Manage exceptions automatically or manually and change the status of an exception, see [Managing Data Stream Exceptions](#).
- Create or edit exception comments and set resolution codes, see [Creating and Viewing Exception Comments](#).
- Filter and search exceptions in the Inbox, See [Exception Inbox Filter and Search Features](#).

The **Exceptions - Inbox - Individual** screen (shown below) provides the following individual exception information in the **Display** pane:

Figure 5–1 Exceptions - Inbox - Individual Screen

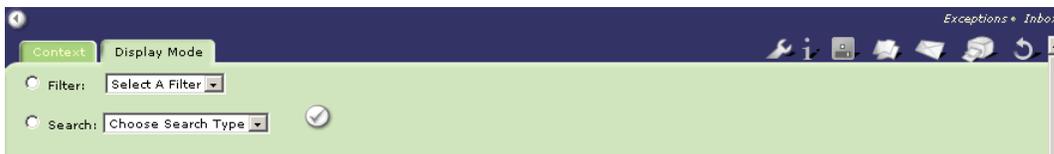
Period	Product	Local	Partner	Deviation	Source	Compared	View Criteria	Percent	Created	Status	Status History	Severity	UOM	Ty
10/28/03	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	-1,098.00	223.00	1,321.00		-83.12	10/27/03 17:21:46	Escalated		Low	Base Units	Sa Fo Sa
10/29/03	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	-4,067.00	445.00	4,512.00		-90.14	10/27/03 17:21:46	Escalated		Low	Base Units	Sa Fo Sa
10/30/03	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	-6,122.00	12.00	6,134.00		-99.80	10/27/03 17:21:46	In-Process		Low	Base Units	Sa Fo Sa
10/31/03	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	340.00	552.00	212.00		160.38	10/27/03 17:21:46	Escalated		Low	Base Units	Sa Fo Sa

The inbox initially shows all exceptions generated at or below the context you have selected. However, you may customize your view in the following ways:

- Apply a default filter to see only the exceptions important to you.
- To create a filter, see [Setting Inbox Filters Preferences](#) for details.
- To set a filter as your default, see [Setting List Screen Preferences](#) for details.

When you select **Exceptions - Inbox** from the Menu, the **Context Chooser - Display Mode** tab shows your default filter in the "Select A Filter" drop-down seen below.

Figure 5–2 "Select A Filter" Drop-down List



You can view all the exceptions generated on your selected context by clicking **Unfiltered View** on the **Display Mode** tab. This also changes the Display Mode to display the filter and search features. For details, see [Exception Inbox Filter and Search Features](#).

- Arrange the order of the columns to suit your needs. For details, see [Setting List Screen Preferences](#).
- Specify a multi-column sort order.

Inbox View Buttons

There are two buttons that appear on the Inbox List screen, which provide conveniences while viewing exceptions.

Figure 5-3 Inbox View Buttons

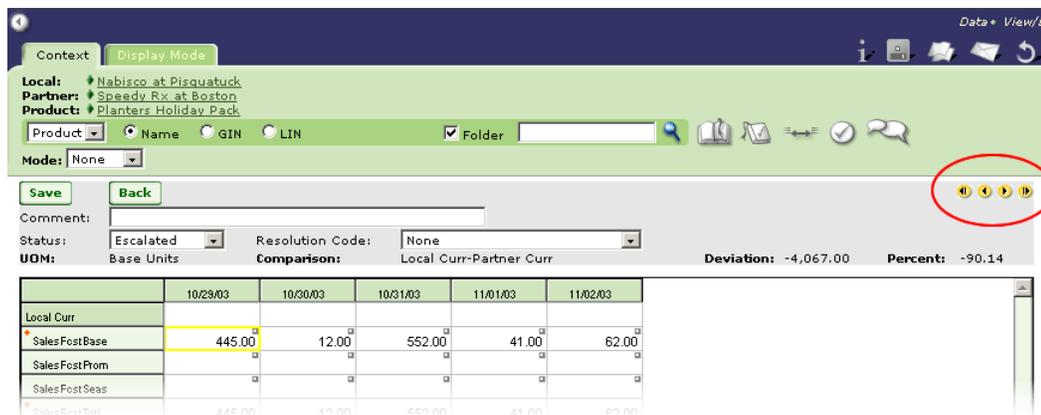


View Exceptions – The **View Exceptions** button appears whenever the "Show" column is displayed. This column of check boxes allows you to select exception data that you wish to view consecutively in more detail. The **View Exceptions** button will appear disabled until at least one check box is selected to show.

To use View Exceptions

1. Mark the exceptions that you wish to view by checking the boxes in the "Show" column.
2. Click the **View Exceptions** button. The Exceptions Data - View/Edit screen appears.

Figure 5-4 Exceptions Data - View/Edit Screen



3. Using the yellow paging buttons, you can page forward 1 record, back 1 record, return to the first record, or skip to the final record in the data display. Only the records that you selected to "Show" will be displayed in this paging sequence.
4. When you have finished viewing/editing data, click "Save" to save changes and "Back" to return to Exceptions List screen.

View Collapsed / Expanded – If you are viewing an Exceptions List in collapsed view, the **View Expanded** button will appear. If viewing in expanded mode, the **View Collapsed** button will be displayed. This button functions as a toggle between the collapsed and expanded inbox views. The initial list display (collapsed or expanded) will depend on your preference settings. For more information on selecting a display mode in user preferences, see [Setting List Screen Preferences](#).

The third button, **Apply Changes** on the Exception Inbox screen, does not affect viewing and is used to apply status changes made on the screen.

List Columns

The following are descriptions of the columns in the **Exceptions - Inbox - Individual** screen:

- **View Exception** – click the colored dot below the "View" icon to view the data streams that triggered the exception.
- **Criteria Name** – displays the name of the causal exception criteria.
- **Severity** – displays the severity level of the exception: Low, Medium, or High.
- **View/Edit Comment** – click the colored dot below the "View/Edit Comment" icon to view/edit the comments entered for the exception. Also allows you to select a resolution code from a drop-down list.

Note: The View/Edit Comment dot appears grey when individual exceptions do not have an associated comment or resolution code.

- **Show** – check boxes that allow the consecutive viewing of Exceptions Data. Data - View/Edit screens for each checked exception can be paged forward or backward without the need to return to the List screen.
- **Shared with** – the name of the trading partner that each exception is shared with, or "none".
- **Collapsed Count** – number of exceptions that have been collapsed. This column is only visible when the Inbox is viewed in collapsed mode.
- **Period** – displays the time period for which the exception was triggered.
- **Product** – displays a description of the product.
- **Local** – displays the local location for the exception.
- **Partner** – displays the partner location for the exception.
- **Deviation** – displays the amount the new data stream varies from the data stream to which it was compared.
- **Percent** – displays the value of the deviation expressed as a percentage of the exception criteria for the type selected.(e.g., a common representation of the formula for calculating percentage value is $((A-B)/B * 100)$).
- **View Criteria** – the exception criteria that triggered the exception. Click on the colored dot to view the criteria.
- **Created** – displays the date the exception was created.
- **Status** – displays the exception status. You can change the status of an exception. Exception status can be changed from

Active supersedes to:

- In-Process
- Resolved
- Unresolvable
- Dismissed
- Escalated

Escalated/Auto Escalated supersedes to:

- Resolved
- Unresolvable
- Dismissed

In-Process/Auto In-Process to:

- Resolved
- Unresolvable
- Dismissed
- Escalated

Only exceptions that have a status of "Active", "In-Process", "Escalated", "Auto Escalated", "Supersedes", "Auto Incomplete" or "Auto In-Process" are displayed in the Inbox.

- **Status History** – When the colored dot is clicked, drills down to the **Status History** screen to show the status change history for the exception.

The **Exceptions - Inbox - Group** screen (shown below) provides the following group exception information in the **Display** pane:

Figure 5-5 Exceptions - Inbox - Group Screen

Context

Exceptions + Inbox

Local: Nabisco at Pisquatuck
Partner: Speedy Rx at Boston
Product: Planters

Product Name GIN LIN Folder

Individual Group External Partner

Context Only Period Only

Apply Changes View Collapsed

Displaying 1-12 of 12

Criteria Name	Period	Product	Local	Partner	View Criteria	Created	Status	Status History
Group1	04/12/02	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/17/02	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/11/02	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/15/02	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/14/02	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/10/02	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/13/02	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/12/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/11/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/14/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/10/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	

- **View Exceptions** – When the colored dot is clicked, below the "View" icon displays the individual exceptions that triggered/caused the group exception.
- **Criteria Name** – displays the name of the causal group exception criteria.
- **Period** – displays the time period of the data stream exception.
- **Product** – displays a description of the product.
- **Local** – displays the local location for the exception.
- **Partner** – displays the partner location for the exception.
- **Created** – displays the date the exception was created.
- **View Criteria** – click on the colored dot to view the group criterion that triggered the exception.
- **Status** – displays the exception status. Allows you to change the status of a group exception. Exception status can be changed from

Active supersedes to:

- In-Process
- Resolved
- Unresolvable
- Dismissed
- Escalated

In-Process supersedes to:

- Resolved

- Unresolvable
- Dismissed
- Escalated

Escalated to:

- Resolved
- Unresolvable
- Dismissed

Only exceptions that have a status of "Active", "In-Process", "Escalated", or "Supersedes" are displayed in the Inbox.

- **Status History** – When the colored dot is clicked, drills down to the **Status History** screen to display the status change history for the group exception.
- **View/Edit Comment** – When the colored dot is clicked below the "View Comment" icon displays the view/edit screen for the comments entered for the exception. Also allows you to select a resolution code for the comment from a drop-down list.

Note: The View/Edit Comment dot appears gray when exceptions do not have an associated comment or resolution code.

- **Collapsed Count** – When in collapsed mode, shows the number of collapsed exceptions in the row.

The **Exceptions - Inbox - External** screen shows only exceptions loaded through the Exceptions Loader. Delete is the only action that can be performed upon these exceptions.

Figure 5-6 *Exceptions - Inbox - External Screen*

The screenshot shows a software interface for managing exceptions. At the top, there are filters for Local, Partner, and Product, all set to 'Dave Wilson-All Locations', 'Dave Wilson-All Partners', and 'Dave Wilson-All Products' respectively. Below these are search criteria for Name, GIN, LIN, and Folder. The main area displays a table of exceptions with the following data:

Local	Partner	Product	Period	Type1	Type2	Offset	Deviation	Percent	Severity	UOM	Source	Compared	Created	Status
<input type="checkbox"/>	Nabisco at Piquatuck	Speedy Rx at Boston	Planters Holiday - 11/09/03	POS Forecast (Units)- POS Fcst Bas	N/A-	0	86.00	77.48	Low	Base Units	25.00	111.00	10/24/03 15:29:28	Active
<input type="checkbox"/>	Nabisco at Piquatuck	Speedy Rx at Boston	Planters Holiday - 11/16/03	POS Forecast (Units)- POS Fcst Bas	N/A-	0	81.00	72.97	Low	Base Units	30.00	111.00	10/24/03 15:29:28	Active
<input type="checkbox"/>	Nabisco at Piquatuck	Speedy Rx at Boston	Planters Holiday - 11/23/03	POS Forecast (Units)- POS Fcst Bas	N/A-	0	76.00	68.47	Low	Base Units	35.00	111.00	10/24/03 15:29:28	Active
<input type="checkbox"/>	Nabisco at Piquatuck	Speedy Rx at Boston	Planters Holiday - 11/02/03	POS Forecast (Units)- POS Fcst Bas	N/A-	0	91.00	81.98	Low	Base Units	20.00	111.00	10/24/03 15:29:28	Active

- **Local** – displays the local location for the exception.
- **Partner** – displays the partner location for the exception.
- **Product** – displays a description of the product.
- **Period** – displays the time period of the data stream exception.
- **Type 1** – displays the first source data stream used to calculate the exception.
- **Type 2** – displays the second source data stream used to calculate the exception.
- **Offset** – displays the offset: In the "current to current" comparison type, the period of the data stream being compared to the current data stream, i.e., current = "0", most recent previous = "-1", etc. A period offset of 2 would appear as Period/2.

In the "current to previous" comparison type, the version of the data stream being compared to the current data stream, i.e., current = "0", most recent previous = "1", etc. A generational offset of 5 would appear as Generation/5.
- **Deviation** – displays the amount the new data stream varies from the data stream to which it was compared.
- **Percent** – displays the value of the deviation expressed as a percentage of the exception criteria for the type selected.(e.g., a common representation of the formula for calculating percentage value is $((A-B)/B * 100)$). For more information on the percentage formula, see [Data Stream Exception Criteria Formulas](#).
- **UOM** – displays unit of measure: Base Units, Stat Units, Load, or Currency.
- **Source** – displays one of the two values used to calculate deviation as a Percentage or an Absolute for any comparison type.
- **Compared** – displays the value that "Source" is compared to.
- **Created** – displays the date the exception was created.
- **View Comment** – click the colored dot below the "View Comment" icon to view/edit the comments entered for the exception. Also allows you to select a resolution code for the comment from a drop-down list.
- **Severity** – displays the severity level of the exception: Low, Medium, High.

Note: One or more of the columns described above may be hidden depending on your settings in Preferences - Layout - Lists - Exception Inbox.

- **Status** – displays the exception status.

Viewing Exceptions and Exception Data

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

The **Exception Inbox** appears in the **Display** pane containing the exceptions for the context you selected in four tabs: **Individual, Group, External, and Partner**. However, only three tabs, **Individual, Partner** and **Group**, can be examined in detail.

Note: If you delete a leaf or all leaves from a folder that has exception criteria (either Sum or Any) with active exceptions, the old exceptions for this criteria will not be removed. Additionally, for aggregate exceptions (Sum), the drilled-down Grid View cannot be displayed.

Expanded View

You can view individual or group exceptions in "expanded" view or "collapsed" view. "Expanded" view shows each exception individually at or below a given context, as shown below.

Figure 5-7 Exception Inbox - Expanded View

Individual Group External Partner														
Apply Changes View Exceptions View Collapsed														
Displaying 1-8 of 8														
Period	Product	Local	Partner	Deviation	Source	Compared	View Criteria	Percent	Created	Status	Status History	Severity	UOM	Tv
10/28/03	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	-1,098.00	223.00	1,321.00		-83.12	10/27/03 17:21:46	Escalated		Low	Base Units	Sa Fo Sa
10/29/03	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	-4,067.00	445.00	4,512.00		-90.14	10/27/03 17:21:46	Escalated		Low	Base Units	Sa Fo Sa
10/30/03	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	-6,122.00	12.00	6,134.00		-99.80	10/27/03 17:21:46	In-Process		Low	Base Units	Sa Fo Sa
10/31/03	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	340.00	552.00	212.00		160.38	10/27/03 17:21:46	Escalated		Low	Base Units	Sa Fo Sa

Collapsed View

The collapsed view collapses multiple exceptions to a single entry in the Inbox. The exceptions are collapsed on the following fields:

- Local
- Partner
- Product
- UOM
- Base stream type code (Type 1 and Type 2)
- Criteria name

Figure 5-8 Exception Inbox - Collapsed View

Period	Product	Local	Partner	Deviation	Source	Compared	View Criteria	Percent	Created	Status History
multiple	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	multiple	multiple	multiple	multiple	multiple	multiple	
multiple	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	multiple	multiple	multiple	multiple	multiple	multiple	
11/01/03	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	-6,510.00	41.00	6,551.00		-99.37	10/27/03 17:21:46	

Note: Exceptions on period folders are not collapsed. When in "collapsed" view, a column called "Collapsed Count" will be displayed. The number value in this column represents the number of collapsed exceptions for that entry.

Viewing Exceptions in the Individual Inbox

In the **Exceptions - Inbox - Individual** screen, you have the options of

- [Viewing Exceptions and Exception Data in Individual Expanded View](#)
- [Viewing an Individual Exception's Criteria.](#)
- [Viewing an Individual Exception's Status History.](#)

Viewing Exceptions and Exception Data in Individual Expanded View

The "Expanded" view shows each exception individually at or below a given context. To set your **Exception Inbox** view to "Expanded", see [Setting List Screen Preferences](#).

To view an individual exception and the data stream that produced it in Expanded view

1. Make sure you have set your **Exception Inbox** view to "Expanded", see [Setting List Screen Preferences](#).
2. Select your context.
3. Select **Exceptions - Inbox - Individual**. The individual exceptions at or below the current context you selected appear in the **Display** pane.
4. To view the value that triggered the individual exception, click the colored dot under the "View this exception" icon. You can view the exception in either table mode or graph mode. The data stream containing the exception is displayed, and the figure that produced the exception is highlighted in table mode with a blue square in the appropriate cell.

Cell highlights: Both base and comparison value are highlighted in the same color. Note that the border of some table cells will be highlighted to indicate the severity of the exception. Colors include

- Red = high severity
- Orange = medium severity

- Yellow = low severity

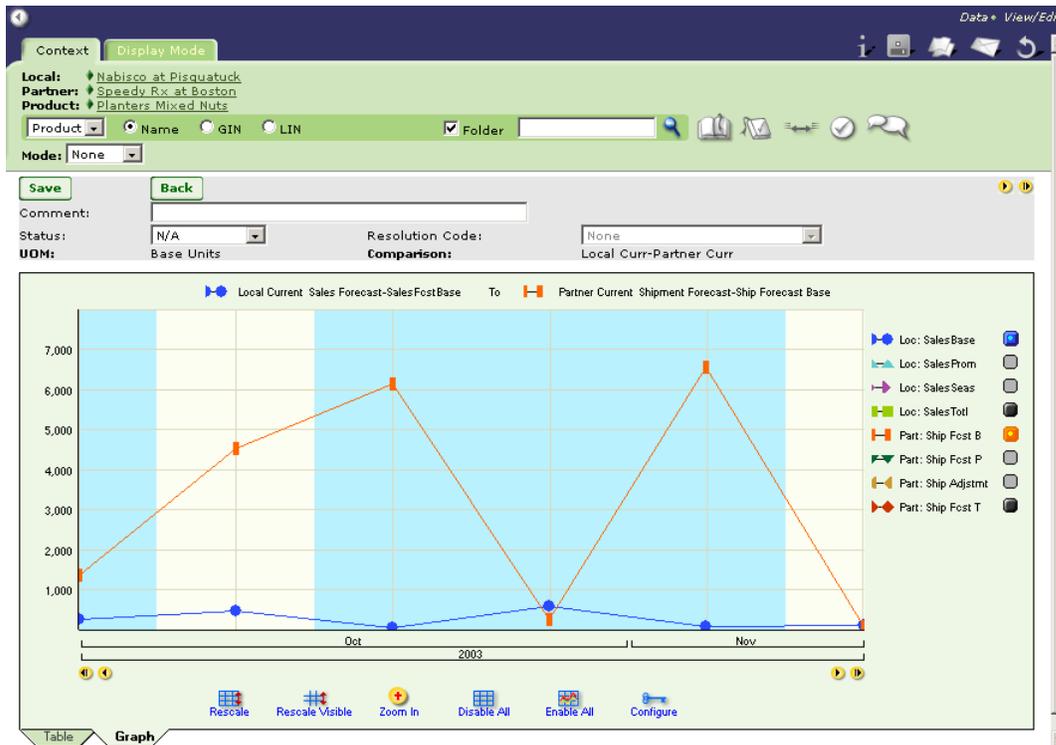
Figure 5-9 Cell Highlights

The screenshot shows a software interface with a data table. The table has columns for dates (10/28/03, 10/29/03, 10/30/03, 10/31/03, 11/01/03, 11/02/03) and rows for 'Local Curr' and 'Partner Curr' categories. The values in the 'Local Curr' and 'Partner Curr' rows are highlighted in yellow. The interface also includes a header with 'Context' and 'Display Mode' tabs, and a footer with 'Table' and 'Graph' view options.

	10/28/03	10/29/03	10/30/03	10/31/03	11/01/03	11/02/03
Local Curr						
SalesFostBase	223.00	445.00	12.00	552.00	41.00	62.00
SalesFostProm						
SalesFostSeas						
SalesFostTotl	223.00	445.00	12.00	552.00	41.00	62.00
Partner Curr						
Ship Forecast Base	1,321.00	4,512.00	6,134.00	212.00	6,551.00	33.00
Ship Forecast Promo						
Ship Forecast Adj						
Ship Forecast Total	1,321.00	4,512.00	6,134.00	212.00	6,551.00	33.00

In **Graph** format, the value that triggered the exception is highlighted by a vertical blue line in graph mode, as shown below.

Figure 5–10 Exception Highlighted by a Vertical Blue Line in Graph Mode



Note: If you change a value in the data stream view, the change will not be reflected in the Inbox until the changes have been processed by the Scheduler. Until processing, a blue processing indicator appears next to the changed exception.

Both the Table and the Graph view contain additional fields under the context chooser area. These fields include

- Comment field (only editable when the Inbox is expanded)
- Resolution Code drop-down (only editable when the Inbox is expanded)
- Status drop-down

As a convenience, these fields can be modified from the Data - View/Edit screen while viewing and updating data. All three fields are also available through the Inbox List screen, where you can enter a comment and resolution code by drilling down in the Comment column, or by changing the exception status by modifying the Status drop-down on the List screen.

5. Click **Back** and the viewed exception is highlighted in yellow, as shown below.

Figure 5–11 Viewed Exception Highlighted in Yellow

Displaying 1-3 of 3

Period	Product	Local	Partner	Deviation	Source	Compared	View Criteria	Percent	Created	Status History
multiple	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	multiple	multiple	multiple	multiple	multiple	multiple	
multiple	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	multiple	multiple	multiple	multiple	multiple	multiple	
11/01/03	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	-6,510.00	41.00	6,551.00		-99.37	10/27/03 17:21:46	

Note: Viewing an exception from the **Exception Inbox** changes the context to that of the selected exception. Clicking the **Back** button returns you to the **Exception Inbox** and automatically restores your context.

Viewing Exceptions and Exception Data in Individual Collapsed View

To view an exception's criteria in collapsed view.

1. Make sure you have set your **Exception Inbox** view to "Collapsed", see [Setting List Screen Preferences](#).
2. Select your context.
3. Select the **Exceptions - Inbox - Individual** subtab. The exceptions for the context you selected appear in the **Display** pane.
4. To view the values that triggered all the exceptions for a context, click the colored dot under the "View this exception" icon while "multiple" is selected in the drop-down list under "Period". You view the exceptions in table mode. The data streams containing the exceptions are displayed.

Cell border highlights will appear based on exception severity:

- Red = High
- Orange = Medium
- Yellow = Low

Figure 5–12 Cell Border Highlights

	10/28/03	10/29/03	10/30/03	10/31/03	11/01/03	11/02/03
Local Curr						
* Sales Fcst Base	223.00	445.00	12.00	552.00	41.00	62.00
Sales Fcst Prom						
Sales Fcst Seas						
* Sales Fcst Totl	223.00	445.00	12.00	552.00	41.00	62.00
Partner Curr						
* Ship Forecast Base	1,321.00	4,512.00	6,134.00	212.00	6,551.00	33.00
Ship Forecast Promo						
Ship Forecast Adj						
* Ship Forecast Total	1,321.00	4,512.00	6,134.00	212.00	6,551.00	33.00

If "None" is selected for the exception criteria's Group To Display option, the table resemble the image above. For more information on selecting Group To Display, see [Individual Exception Criteria](#).

If you have chosen to display "All" for the Group To Display option, you will instead see a table that includes data from the groups you have selected.

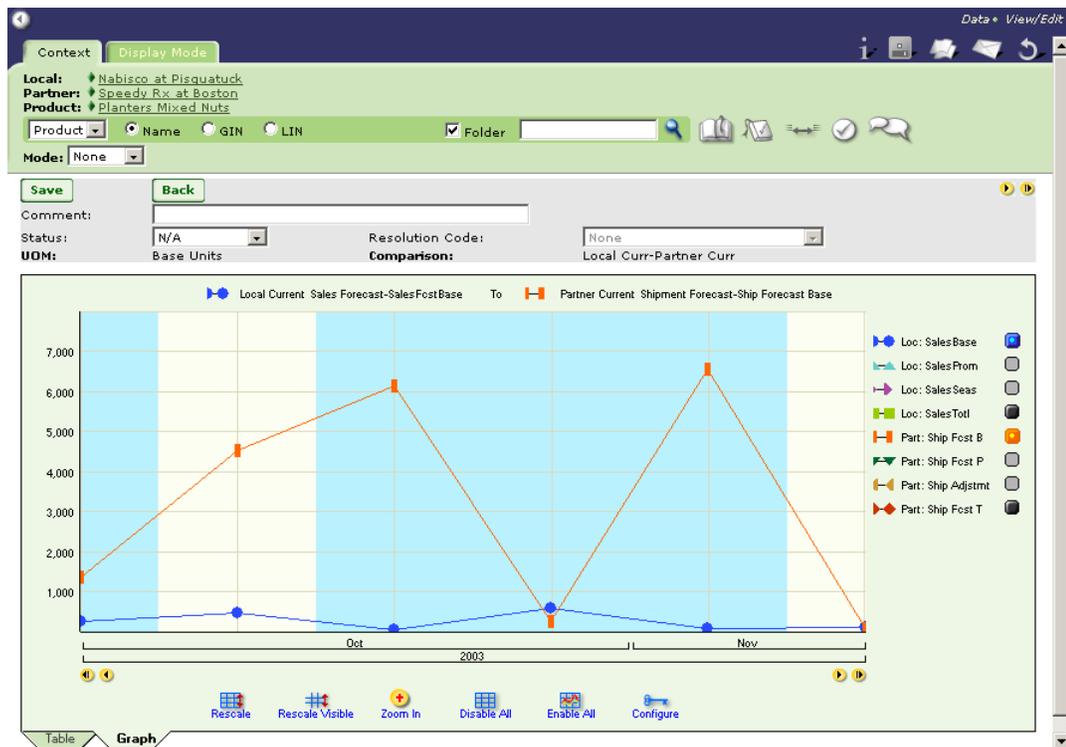
Selecting an individual exception from the following drop-down lists in the **Exception Inbox - Individual** screen in collapsed view and clicking the colored dot under the "View" icon allows you to view only the data stream that triggered the selected exception.

You can view the individual exception in either table mode or graph mode.

Exception statuses can also be changed in the Exception Data Stream View. The new status will be applied to all the exceptions collapsed into the edited row.

In **Graph** mode, the value that triggered the exception is highlighted by a vertical blue line in graph mode, as shown below.

Figure 5–13 Exception Highlighted by a Vertical Blue Line in Graph Mode



5. Click **Back** and the viewed exception is highlighted in yellow, as shown below.

Figure 5–14 Exception Highlighted in Yellow

Individual Group External Partner

Apply Changes View Exceptions View Expanded

Displaying 1-3 of 3

Period	Product	Local	Partner	Deviation	Source	Compared	View Criteria	Percent	Created	Status
multiple	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	multiple	multiple	multiple	multiple	multiple	multiple	●
multiple	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	multiple	multiple	multiple	multiple	multiple	multiple	●
11/01/03	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	-6,510.00	41.00	6,551.00	●	-99.37	10/27/03 17:21:46	●

Note: Viewing an exception from the **Exception Inbox** changes the context to that of the selected exception. Clicking the **Back** button returns you to the **Exception Inbox** and automatically restores your context.

Viewing an Individual Exception's Criteria

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

To view an exception's criteria

1. Select your context.
2. Select the **Exceptions - Inbox - Individual** subtab.
3. For expanded/collapsed view, click the colored dot under "View Criteria" column to view the details of the criteria that triggered the selected exception. The Exceptions - Criteria - Individual - Create screen appears as a read-only display.

Figure 5-15 Exceptions - Criteria - Individual - Create Screen

The screenshot shows a form for creating an exception criterion. It includes fields for Name (groupall), Group To Display (All), Effectivity Dates (Start and End), Aggregate On (UOM: Base Units, Share with: None), Period (Base Periods, Fixed, Rolling, All Periods), Comparison (Current to Current, Current to Previous, Threshold), Type 1 and Type 2 (Actual "Sales", Subtype: ActualSales:Base, Type is: Partner), Offset (None, Period), Percent Formula ($[(type\ 1 - type\ 2) / type\ 2] * 100$), Absolute Threshold (12.00), Percent Threshold (2.00), Severity (None), and checkboxes for 'Trigger even if part of group' and 'Treat missing value as zero'. There are 'Back' and 'Advanced' buttons at the bottom.

4. Click **Advanced** to view the automated exception resolution settings for the exception criterion.

Figure 5-16 Automated Exception Resolution Settings for the Exception Criterion

The screenshot shows a table of automated exception resolution settings. The table has columns for Severity (Low, Medium, High) and rows for Initial Actions, In-Process Actions, and Resolution Actions. Each row contains settings for Timeout Threshold, Send E-mail, E-mail Language, Adjust Local Value to, and Set Status. A 'Back' button is located at the bottom left.

Action Specification	Local Stream to Adjust:	Subtype:	
Severity	Low	Medium	High
Initial Actions			
Put alert in Inbox:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Send E-mail:	<input type="text"/>	<input type="text"/>	<input type="text"/>
E-mail Language::	American English	American English	American English
Adjust Local Value to:	None	None	None
Set Status:	None	None	None
In-Process Actions			
Timeout Threshold:	<input type="text"/> Days	<input type="text"/> Days	<input type="text"/> Days
Send E-mail:	<input type="text"/>	<input type="text"/>	<input type="text"/>
E-mail Language::	None	None	None
Adjust Local Value to:	None	None	None
Set Status:	None	None	None
Resolution Actions			
Timeout Threshold:	<input type="text"/> Days	<input type="text"/> Days	<input type="text"/> Days
Send E-mail:	<input type="text"/>	<input type="text"/>	<input type="text"/>
E-mail Language::	None	None	None
Adjust Local Value to:	None	None	None
Set Status:	None	None	None

5. Click **Back** to return to the read-only view of the Exception Criteria Create screen.

- Click **Back** to return to **Exceptions - Inbox - Individual** screen.

Viewing an Individual Exception's Status History

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

To view an exception's status history

- Select your context.
- Select the **Exceptions - Inbox - Individual** subtab.
- For an expanded view, click the colored dot under "Status History" for the exception that you want to view.

Figure 5-17 Status History

Modification Date	User Name	Old Status	New Status
10/28/03 11:57:00	Dave Wilson	Active	Escalated

For collapsed view, select the individual exception from the drop-down lists and click the colored dot under "Status History". When the exceptions are in multiple view, the "Status" column displays "N/A", and you will not be able to drill down to the Status History screen.

- Click **Back** to return to **Exceptions - Inbox - Individual** screen.

Viewing Exceptions in the Group Inbox

In the **Exceptions - Inbox - Group** screen, you have the options of selecting either the Context Only or Period Only subtab. This controls the display of exceptions that are grouped by either Period or Context. When you create a group exception, the Display Matched option on the Exceptions - Criteria - Group - Create screen allows you to select whether you wish to use this option. The group exceptions that are not assigned Period or Context matching will default to context and period, and will appear in the Context Only subtab.

Both subtabs offer the following choices

- Viewing a Group Exception in Group Expanded View.
- Viewing a Group Exception in Collapsed View.
- Viewing a Group Exception's Criteria.
- Viewing a Group Exception's Status History.

Viewing Exceptions in the Context Only Subtab

The Exceptions - Inbox - Group - Context Only screen displays exceptions that are triggered by a group criteria with a comparison type set to "Context & Period" or "Context Only".

Figure 5–18 Exceptions - Inbox - Group - Context Only Screen

The screenshot shows the 'Context Only' subtab in the 'Exceptions - Inbox - Group' screen. The interface includes filters for Local (Nabisco at Pisquatuck), Partner (Speedy Rx at Boston), and Product (Planters Mixed Nuts). It also has tabs for Individual, Group, External, and Partner, with 'Context Only' selected. Below the filters are buttons for 'Apply Changes' and 'View Collapsed'. The main area displays a table of exceptions with the following data:

Criteria Name	Period	Product	Local	Partner	View Criteria	Created	Status	Status History
Group1	04/12/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/11/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/14/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/10/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	
Group1	04/13/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston		10/15/02 19:00:31	Active	

Viewing Exceptions in the Period Only Subtab

The Exceptions - Inbox - Group - Period Only screen displays exceptions that are triggered by a group criteria with a comparison type set to "Period Only".

Viewing a Group Exception in Group Expanded View

The "Expanded" view shows each group exception individually at or below a given context.

To view a group exception and the individual exceptions that triggered the group exception

1. Make sure you have set your **Exception Inbox** view to "Expanded", for details see [Setting List Screen Preferences](#).
2. Select your context.
3. Select **Exceptions - Inbox - Group**. The Context Only subtab will be selected by default. The group exceptions for the context you selected appear.

Figure 5–19 Group Exceptions for the Context

Context

Local: Nabisco at Pisquatuck
Partner: Speedy Rx at Boston
Product: Planters Mixed Nuts

Product Name GIN LIN Folder

Individual Group External Partner

Context Only Period Only

Apply Changes View Collapsed

Displaying 1-5 of 5

Criteria Name	Period	Product	Local	Partner	View Criteria	Created	Status	Status History
Group1	04/12/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	●	10/15/02 19:00:31	Active	
Group1	04/11/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	●	10/15/02 19:00:31	Active	
Group1	04/14/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	●	10/15/02 19:00:31	Active	
Group1	04/10/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	●	10/15/02 19:00:31	Active	
Group1	04/13/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	●	10/15/02 19:00:31	Active	

- To view the individual exceptions that caused the group exception to be triggered, click the colored dot under the "View this exception" icon.

Figure 5–20 Individual Exceptions of Group

Context

Local: Nabisco at Pisquatuck
Partner: Speedy Rx at Boston
Product: Planters Mixed Nuts

Back Apply Changes View Exceptions View Expanded

Individual Exceptions Of Group
Displaying 1-1 of 1

Criteria Name	Period	Product	Local	Partner	Deviation	Source	Compared	View Criteria	Percent	Created	Status History	Severity	UOM	Type1	Type2
Crit2	04/12/02	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	50.00	62.00	12.00	●	416.67	10/15/02 19:00:22	Active	Low	Base Units	DC Inventory-DC Inventory	

- You can perform all the operations that can be performed in the **Exceptions - Inbox - Individual** screen.
 - Viewing exceptions (See [Viewing Exceptions and Exception Data in Individual Expanded View](#), to view the value that triggered the individual exception, click the colored dot under the "View this exception" icon. You can view the exception in either table mode or graph mode. The data stream containing the exception is displayed, and the figure that produced the exception is highlighted in table mode with a blue square in the appropriate cell.)
 - Viewing criteria (See [Viewing an Individual Exception's Criteria](#). For expanded/collapsed view, click the colored dot under "View Criteria" column to view the details of the criteria that triggered the selected exception. The

Exceptions - Criteria - Individual - Create screen appears as a read-only display.)

- Viewing status history (Viewing a Group Exception's Status History)
 - Changing exception status (Changing the Status of Data Stream Exceptions Manually)
 - Viewing/editing an exception comment Creating and Viewing Exception Comments.
6. Click **Back** to return to **Exceptions - Inbox - Group - Context Only**.

Viewing a Group Exception in Collapsed View

To view a Group exception and Individual Exceptions that triggered the Group Exception

1. Make sure you have set your **Exception Inbox** view to "Collapsed", see [Setting List Screen Preferences](#).
2. Select your context.
3. Select **Exceptions - Inbox - Group - Context Only**. The group exceptions for the context you selected appear in the **Display** pane.
4. Being at a multiple level, you cannot click the colored dot under the "View" icon to view the exception. You must select a group exception from the drop-down lists under the "Period" or "Created" column and then click the colored dot under the "View" icon to view the individual exceptions that caused the group exception to trigger.
5. Now that you are at this individual exception level, you can perform all the operations that can be performed in the **Exceptions - Inbox - Individual** screen.
 - Viewing exceptions (See [Viewing Exceptions and Exception Data in Individual Expanded View](#), to view the value that triggered the individual exception, click the colored dot under the "View this exception" icon. You can view the exception in either table mode or graph mode. The data stream containing the exception is displayed, and the figure that produced the exception is highlighted in table mode with a blue square in the appropriate cell.)
 - Viewing criteria (See [Viewing an Individual Exception's Criteria](#). For expanded/collapsed view, click the colored dot under "View Criteria" column to view the details of the criteria that triggered the selected exception. The Exceptions - Criteria - Individual - Create screen appears as a read-only display.)
 - Viewing status history (Viewing a Group Exception's Status History)
 - Changing exception status (Changing the Status of Data Stream Exceptions Manually)
 - Viewing/editing an exception comment Creating and Viewing Exception Comments.
6. Click **Back** to return to **Exceptions - Inbox - Group - Context Only**.

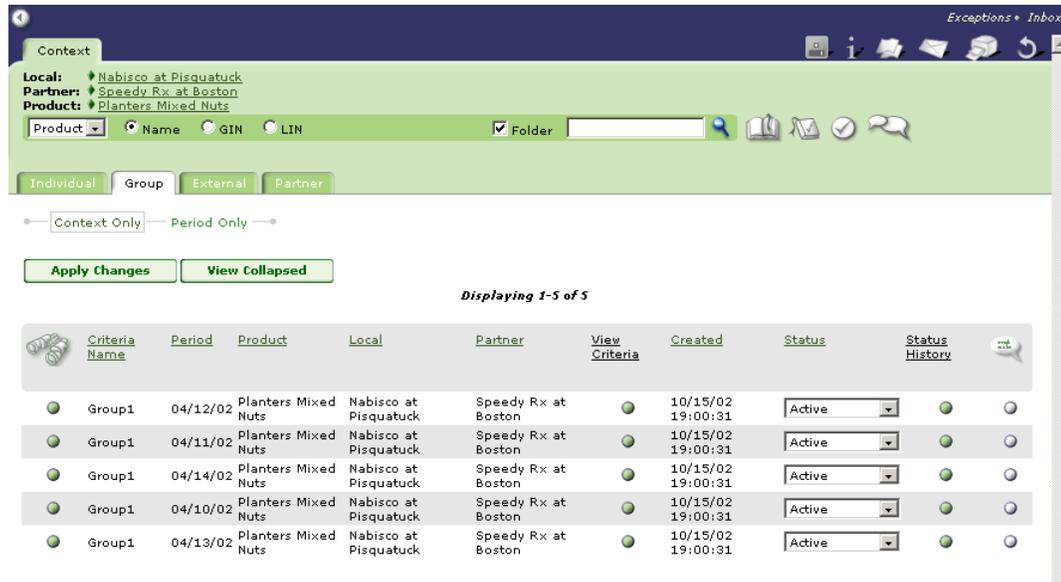
Viewing a Group Exception's Criteria

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

To view an exception's criteria

1. Select your context.
2. Select **Exceptions - Inbox - Group**. The exceptions for the context you selected appear in the **Display** pane.

Figure 5–21 Exceptions - Inbox - Group Screen



3. For expanded/collapsed view, click the colored dot under "View Criteria" for the exception criteria that you want to view.

From this screen, you can view the individual group criteria for the exception by clicking the colored dot under the "View Criteria for This Group" column.

4. Click **Back** to return to **Exceptions - Inbox - Group - Context Only**.

Viewing a Group Exception's Status History

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

To view a group exception's status history

1. Select your context.
2. Select **Exceptions - Inbox - Group**. The exceptions for the context you selected appear in the **Display** pane.
3. For expanded view, click the colored dot under "Status History" for the group exception that you want to view.

For collapsed view, select a group exception from the drop-down lists and click the colored dot under "Status History".

4. Click **Back** to return to **Exceptions - Inbox - Group - Context Only**.

Viewing Exceptions in the Partner Inbox

The Partner tab is similar to the Individual tab except that all the exceptions which appear in this list were triggered by partners. You will be able to see any partner exceptions here that have been shared with you. All the actions available in the

Individual Inbox tab are also available in the Partner Inbox tab. Refer to Viewing Exceptions in the Individual Inbox for more information on navigating the Inbox views and options.

Managing Data Stream Exceptions

Exceptions are displayed in the **Exceptions - Inbox** screen in the **Display** pane. Oracle Retail VCC provides automatic exception management of all exceptions in the inbox, and also allows you to manage exceptions manually.

Exception Statuses

Valid Exception Statuses include:

- Active – exception is currently active.
- Dismissed – set manually by the user. Will be removed from the inbox.
- Escalated – set manually by the user. Will be displayed in Inbox.
- In-Process – set manually by user. Will be displayed in Inbox.
- Obsolete – data no longer meets criteria conditions and is removed from Inbox.
- Resolved – set manually by the user. Will be removed from Inbox.
- Supersedes – new exceptions whose quantities have superceded existing exceptions. Exceptions with this status will also carry forward the previous comment and reason code from the superceded exception.
- Superceded – Existing exceptions whose quantities have been superceded by newly triggered exceptions. Any comment and reason codes will be passed on to the exception that supercedes them.
- Unresolvable – set manually by the user; exception cannot be resolved. Will be removed from Inbox.
- Auto Dismissed – set by auto-resolution. Will not be displayed in the Inbox.
- Auto Escalated – set by auto-resolution, and will be displayed in the Inbox.
- Auto Incomplete – set by auto-resolution, and will be displayed in the Inbox.
- Auto In-Process – set by auto-resolution, and will be displayed in the Inbox.
- Auto Resolved – set by auto-resolution. Will not be displayed in the Inbox.
- Auto Unresolvable – set by auto-resolution. Will not be displayed in the Inbox.

Managing Data Stream Exceptions Automatically

Oracle Retail VCC automatically manages exceptions in the **Exceptions - Inbox** in order that old, obsolete, or redundant exceptions do not clutter the inbox. Oracle Retail VCC does the following for active exceptions:

- New exceptions replace older exceptions if they are for the same context.
- Obsolete exceptions are deleted from the inbox. An exception is obsolete if it no longer applies to a viable context.

Oracle Retail VCC does the following for exceptions marked as "Active", "In-Process", "Escalated", "Auto Escalated", "Auto Incomplete", "Supersedes", or "Auto In-Process":

- If a change in a data stream affects an Active/In-Process/Auto In-Process/Escalated/Auto Escalated/Auto Incomplete exception, it is marked "superseded" in the database. It then disappears from the Inbox. A new active exception with a status of "Supersedes" is generated in its place.
- An Active/In-Process/Auto In-Process/Escalated/Auto Escalated/ Auto Incomplete/Supersedes exception is marked "Obsolete in the database" if the exception criterion that triggered the exception is dismissed. The exception then disappears from the Inbox.

An active, auto inprocess, escalated, auto escalated, auto incomplete, supersedes, or in-process exception is removed from the inbox if you delete the criterion that triggered it after the next processing round.

Changing the Status of Data Stream Exceptions Manually

Access to this feature: superadmin, admin, manager, supervisor, and planner.

Oracle Retail VCC allows you to manually change the status of Active/In-Process/Auto In-Process/Escalated/Auto Escalated/Auto Incomplete/Supersedes exceptions by

- Dismissing an exception - removes the exception from the inbox
- Marking an exception "Unresolvable" - removes the exception from the inbox
- Resolving an exception (it is not deleted) - marks the exception as resolved and removes it from the inbox
- Managing the status of an exception from "Active" to "In-Process" the exception as being worked on

See [Exception Statuses](#) for a list of valid exception statuses and their descriptions.

To change the status of an exception

1. Select the appropriate status ("In-Process," "Resolved," "Unresolved," "Dismissed" or "Escalated") from the drop-down list in the **Exceptions - Inbox** screen.
2. Click the "Apply Changes" icon.

Note: When an exception is marked "Resolved," "Unresolvable," or "Dismissed," it disappears from the **Exceptions - Inbox**.

Creating and Viewing Exception Comments

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

Oracle Retail VCC allows you to add a comment to an exception, and set a resolution code. This is useful if you want to add a comment to an exception. Anyone in your company with access to the data stream associated with the exception can read the comment. Comments are limited to 100 characters. You can also select a resolution code for the exception from a drop-down list.

To add or edit an exception comment

1. Select your context.
2. Click the **Exceptions - Inbox - Individual** (or **Group**).

3. In expanded view, click the dot below the "View/Edit Comment" icon to open the comment box for the exception. In collapsed view, you must first select an individual exception.

Note: The dot in the "View/Edit Comment" column is grey if no comment is entered nor resolution code set for an exception. Once a comment is entered or a resolution code set for an exception, the dot turns blue.

4. Enter a comment and select a Resolution Code from the drop-down list. Comments are limited to 100 characters.

Any Comments and Resolution Codes that are attached to an exception that becomes "Superseded" by another exception will be carried forward to new exceptions marked with the "Supersedes" status (i.e., the exceptions that replace or supersede the prior exception will retain the comments and reason codes).

5. Click **OK**.

The comment appears in the **Context Chooser - Context** tab when you view the exception from the Inbox.

Exception Inbox Filter and Search Features

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

About Exception Inbox Filter and Search

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

You can create multiple Exception Inbox Filters and apply them as needed. Filters apply to any context. Filters can be thought of as "saved" searches, because they are searches that you have configured for repeat usage. For details about creating filters, see [Setting Inbox Filters Preferences](#).

The Exception Inbox Search feature allows you to quickly locate any individual exception without having to manually page through numerous exceptions. A Search is a temporary, single-use setting that you configure in the Display Mode tab. It is a convenient option if you would like to quickly find specific data without going through the process of setting up a Filter in user preferences. If you think that the particular Search setting you select may be used on a regular basis, it would save time to create a Filter instead, which can be reused at will.

Note: When you search for exceptions in the collapsed mode, the results are displayed in collapsed mode.

If you do a search on Partner column providing the string "Drug", Oracle Retail VCC displays all records in the database that match the string "*Drug*" anywhere in the Partner tree, such as the folder "Drug Stores" and the leaf name "Wall Drugs at Jacksonville". The asterisk tells Oracle Retail VCC that any letters before or after the word "Drug" are acceptable. If you did a search for "Drug*" your results might turn up "Drug Store", but would not show "Wall Drug". To find "Wall Drug", you would have to search using "*Drug" or "Drug*". Since "Wall" precedes "Drug", the asterisk is

placed at the beginning of the word. Searching on the word "*Drug*" would turn up both Wall Drug and Drug Store, because the asterisk is both at the beginning and end of the word, meaning that all results with the word "Drug" in them would be displayed.

Examples of viable searches are:

Drug *Drug Drug* Dru* *rug

rug

The asterisk (or wildcard) search is available only for the following criteria: Product, Local Name, Partner name, Type 1, Type 2, and Criteria Name.

Using either Search or Filter, you can locate exceptions based on any of all of the following criteria:

- Period (Before, After, or Between a Selected Period)

Note: The "Period Configuration" selected in **Preferences - Layout - Lists** determines which dates are displayed in the Period column. Options include: Beginning and end of period, End of period, or Beginning of period. (Period Configuration option not available for daily time buckets.)

- Product (product name)
- Local name
- Partner name
- Deviation (<, >, or =, and a value)

You can filter your exception inbox based on deviation values you specify. This allows you to display all exceptions with specific deviations from the original data stream value. You can specify a deviation value that is greater than (>), less than (<), or equal to (=) a specific deviation value. For example, if you want to display all exceptions that vary by at least +10% than the original data stream value, you would specify a deviation value of ">10."

- Percent (<, >, or = and a percentage or Infinity)

Note: Infinity will display all exceptions where the % deviation is equal to infinity.

- Created (Before, After, or Between a Period) (format: MM/DD/YYYY)

Note: "Between" includes both start & end dates.

- Status (Active, In-Process, Escalated, Auto-Escalated, Auto Incomplete, Supersedes or Auto In-Process)
- Severity (Low, Medium, or High)
- UOM (Base Units, Stat Units, Loads, or Currency)
- Type 1 (type 1 stream name)
- Type 2 (type 2 stream name)

- Criteria Name

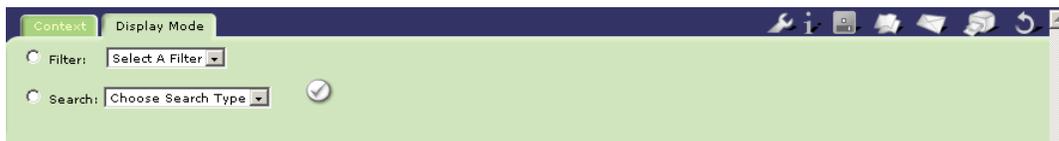
The above search/filter criteria allow you to display specific exceptions or broad categories of exceptions based on your requirements.

Using the Exception Inbox Filter and Search Features

To locate an individual exception using the Exception Inbox Search or Filter feature

1. Set your context.
2. Select **Exceptions - Inbox - Individual**.
3. Select **Context Chooser - Display Mode**.

Figure 5–22 Context Chooser - Display Mode Screen



4. Select either the Filter or Search option.
 - If you wish to Filter, select the filter name from the drop-down list. For example, if you have created a filter to display only exceptions that are by percentages greater than 20%, select that filter.
 - If you would like to Search, select the search criteria from the drop-down list. For example, search for "Percent" > 20.
5. Click the "Apply Changes" icon and a list matching your selected search or filter is displayed.

Exception Criteria

This chapter includes the following topics:

- [Data Stream Exception Criteria](#)
- [Creating Data Stream Exception Criteria](#)
- [Exception Severity Levels](#)
- [Viewing Exception Criteria](#)
- [Copying Exception Criteria](#)
- [Deleting Exception Criteria](#)
- [Exception Inbox E-Mail Alerts](#)
- [Data Stream Exception Criteria Formulas](#)

Data Stream Exception Criteria

Oracle Retail VCC allows you to create and manage **fixed** exception criteria and **rolling** exception criteria. Fixed exception criteria apply to specific time periods and automatically expire with the time period; rolling exception criteria move forward relative to the current time period and persist indefinitely until deleted.

For fixed and rolling exception criteria you can create the following comparison types:

- **Current to Current Comparison** – allows you to compare the current versions of two streams. These streams can be local, partner, or one of each. They can be compared within the same period or across offset period.
- **Current to Previous Comparison** – compares your local current data stream with your local previous data stream, or your partner's current data stream with your partner's previous data stream. You can compare your current and previous streams with or without a generational offset. If your criterion is a generational offset, you can compare, for example, your current POS forecast data stream (e.g., weekly data) to any of its previous versions. So you can compare Week 6 data (offset = "0") with Week 3 (offset = "3").

For criteria without a generational offset, you can only compare your current data stream with the last previous version.

You can also compare the current version of one stream to a version of another stream with generational offset.

- **Current to Threshold Comparison** – compares your local current data stream or your partner's current data stream with an absolute threshold value.

Creating Data Stream Exception Criteria

The method you use to create data stream exception criteria is essentially the same no matter what data stream condition you are trying to detect. The type of exception criteria is determined by the data stream comparison type you specify. Exceptions are not generated until a change or edit is made to the data stream that meets the exception criteria specified or the exception criteria is processed on demand.

There are two types of exception criteria: Individual and Group. When you select **Exceptions - Criteria** from the Oracle Retail VCC menu, two tabs appear in the **Display** pane that allow you to view and create individual and group exception criteria.

Individual Exception Criteria

The **Exceptions - Criteria - Individual** screen contains the following components

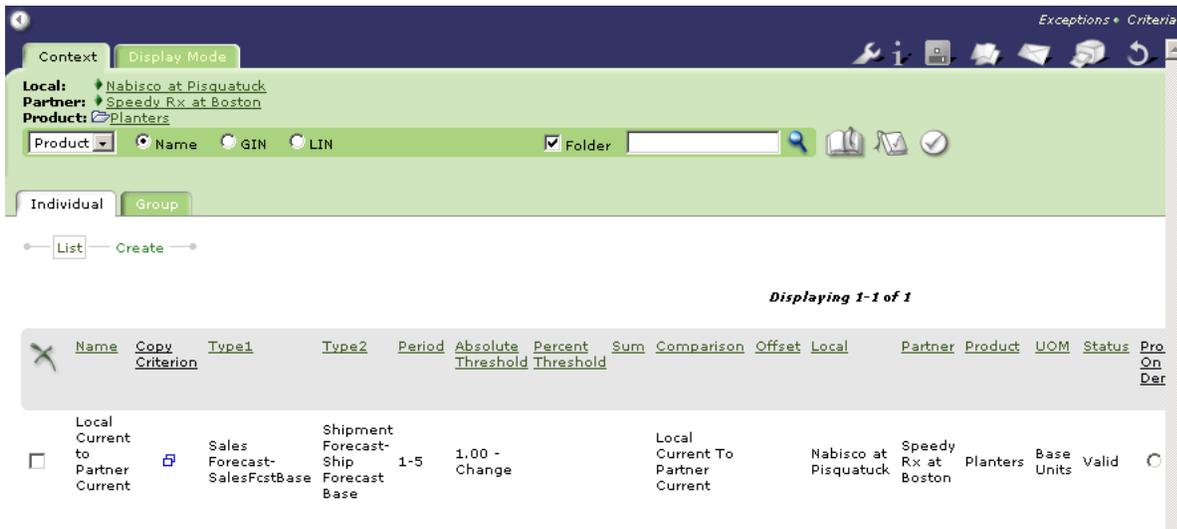
- [Individual Exception Criteria List](#)
- [Creating Individual Exception Criteria](#)

Individual Exception Criteria List

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer. However, planners and reviewers cannot delete exception criteria or process exception criteria "On Demand".

Click **Exceptions - Criteria - Individual - List**, and the following screen appears in the **Display** pane.

Figure 6–1 Individual Exception Criteria List



This displays the current individual exception criteria for a given context. Information about each exception criteria are shown in the following columns:

Note: You can arrange the order of the columns to suit your needs. For details, see [Setting List Screen Preferences](#).

- **View Criteria Details**– displays a read-only view of the **Exceptions - Criteria - Create** screen when the colored dot below the "View" icon is clicked. For details see [Creating Individual Exception Criteria](#).
- **Name** – the name of the exception criteria.
- **Process On Demand** – allows you to process immediately an individual exception criterion. See [Processing Exception Criteria on Demand](#). Not available for planners and reviewers.
- **Type1** – the first source data stream used to calculate the exception.
- **Type2** – the second source data stream used to calculate the exception.
- **Period** – the time period of the data stream exception.
- **AbsoluteThreshold** – the absolute value of the deviation that must be exceeded to trigger an exception. Also indicates whether the exception is triggered if the value is an "increase" (only), "decrease" (only), or "change" (either).
- **Percent Threshold** – the percentage value of the deviation that must be exceeded to trigger an exception. Also indicates whether the exception is triggered if the value is an "increase" (only), "decrease" (only), or "change" (either).
- **Comparison** – the comparison type: "current to current" "current to previous", or "current to threshold". If your comparison type is current to current with one stream being your partners, the comparison description depends on the formula you select for the criteria:
 - Seller to Buyer
 - Buyer to Seller
 - Max to Min

If your comparison type is current to current with period offset, the comparison description depends on whether the streams are local or partner.

- Local Current To Partner Period Offset
- Local Current To Local Period Offset
- Partner Current To Local Period Offset
- Partner Current To Partner Period Offset

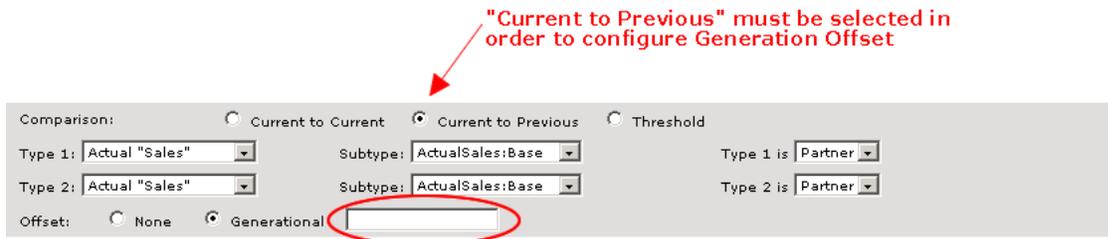
If your comparison type is current to previous with generational offset, the comparison description depends on whether the streams are local or partner.

- Local Current To Partner Generational Offset
- Local Current To Local Generational Offset
- Partner Current To Partner Generational Offset
- Partner Current To Local Generational Offset

About Generation Offset

Generation Offset allows you to compare a current Data Stream with a previously saved generation of the same Data Stream. It can only be accessed when the comparison type is Current to Previous, because only then is a Type 2 data stream accessible. The Type 2 stream you select is the Previous (older) stream you will be comparing the current (Type 1) stream to. After selecting the Generational radio button, the number of generations you type in determines how far back the compared data stream is located.

Figure 6–2 Generation Offset



Generation Offset can be used to go back a number of revisions for a particular data stream with revision history. This is especially useful for forecast type streams, when determining how accurate the forecast is for each revision.

Generation Offset is available in the Exceptions, Metrics, and Reports modules. The following examples demonstrate how Generation Offset is applied to a selected data stream.

Table 6–1 Generation Offset Sample

Time Period of Data Stream = 10/15/2003		
Revision of Data Stream	Creation Date	Quantity
First Revision	10/10/2003 11:00:00 AM	11.5
Second Revision	10/11/2003 11:00:00 AM	12.8
Third Revision	10/13/2003 11:00:00 AM	10.6
Final Revision	10/14/2003 11:00:00 AM	22.4

Oracle Retail VCC arrives at the generation offset quantity by

- Going back the number of time periods specified in the Generation Offset.
- Getting the Latest Revision created on or before the End Date of that time period.

This process can be understood by applying generation offsets to the sample data in Table 2 above.

For a generation offset of 1:

End date of the previous time period = 10/14/2003 11:59:59 PM.

Latest Revision before 10/14/2003 11:59:59 PM is the Final Revision, with a quantity of 22.4.

Since the Final Revision was created one time period before the data stream time period of 10/15/2003, this final revision also gets picked up as Generation 1.

For a generation offset of 2:

End Date for 2 time periods previous = 10/13/2003 11:59:59 PM.

Latest Revision before 10/13/2003 11:59:59 PM is the Third Revision with a quantity of 10.6.

For a generation offset of 3:

End Date for 3 time periods previous = 10/12/2003 11:59:59 PM.

Latest Revision before 10/12/2003 11:59:59 PM is the Second Revision, with a quantity of 12.8.

Since there were no revisions dated 10/12/2003, a generation offset of 3 picks up the second revision dated 10/11/2003 11:00:00 AM.

For a generation offset of 4:

End Date for 4 time periods previous = 10/11/2003 11:59:59 PM.

Latest Revision before 10/11/2003 11:59:59 PM is the Second Revision with a quantity of 12.8.

For a generation offset of 6:

End date for 6 time periods previous = 10/09/2003 11:59:59 PM.

Since the First revision of the data stream is on 10/10/2003 11:00:00, there were no revisions for this offset. Therefore, this offset will result in a NULL quantity.

In this example, any generation offset greater than or equal to 6 will yield a NULL quantity.

- **Product** – name of product.
- **Local** – the local location for the exception.
- **Partner** – the partner location for the exception.
- **Active Exceptions** – displays a count of the Active, In-Process, Escalated, Auto-Escalated, Auto-Incomplete, Auto In-Process and Supersedes exceptions related to the criterion. Click on the number in the **Active Exceptions** column which takes you to an inbox view that contains only the active exceptions (statuses listed above) for that criteria. You can perform all the operations (view exception, view criteria, view status history, and change exception status) that can be performed in the Exceptions Inbox.
- If you change an exception's status in the **Exceptions - Criteria - List - Active Exception**, you must refresh the screen before the new Active Exception Count appears.
- **Delete** – deletes an exception criterion (access to this feature is limited to superadmin, admin, manager, and supervisor). Click the Delete icon to select/deselect all items on the current page to be deleted. Click the individual check box to select/deselect that item to be deleted. See [Deleting Exception Criteria](#).
- **Status** – the status of the exception criteria. Statuses include:
 - Pending – Exception Criteria that have at least one "Aggregate On" check box selected are created with a status of "Pending".
 - Valid – when the Complete Criteria Creation task is run, the "Pending" Criteria statuses are updated to "Valid".
 - Stale – a Criteria status becomes stale whenever
 - any of the Location/Partner/Product dimensions are at folder-level, and a hierarchy change affects the folder.
 - the Roll Criteria scheduler task is run for all Leaf Rolling Criteria.
 - "Any" is applied to the period dimension of a Rolling Period Overlay, and the Roll Criteria scheduler task is run.
 - In-Process – the status of any "stale" Criteria in the process of being synched up will become "In-Process". Status is reverts to "Active" when the sync-up is complete.

- **Copy Criterion** – duplicate criterion. You can copy a given criterion's settings by clicking the blue copy icon. This will take you to the Create screen, where many fields will have the same settings as the copied criterion. You must, however, assign the new criterion a name.
- **Effective Status** – effective status of the criterion. This column is indicated by an image in the list header. There are 3 effectivity states an exception criteria can pass through:
 - Inactive – the specified effectivity hasn't been reached.
 - Active – current date is within the specified effectivity period.
 - Expired – specified effectivity period has passed.
- **Show** – check boxes that, when selected, allow for consecutive viewing of the exception examine screens. Checking the Show check boxes allow you to drilldown once, and then click next to page back and forth through the Detail views of each exception you selected in the list.
- **Shared with** – the name of the trading partner company that each exception is shared with, or "none".
- **UOM** – Unit of Measure used by the exception.

Creating Individual Exception Criteria

Access to this feature: Superuser, server admin, superadmin, admin, manager, and supervisor.

The **Individual - Exceptions - Criteria - Individual - Create** screen allows you to create exception criteria for selected contexts.

To create a data stream exception criterion

1. Select your context.
2. Click **Exceptions - Criteria - Individual - Create** from the Oracle Retail VCC menu and the following screen appears in the **Display** pane:

Figure 6-3 Creating Individual Exception Criteria

The screenshot shows a web-based form for creating individual exception criteria. The form is organized into several sections:

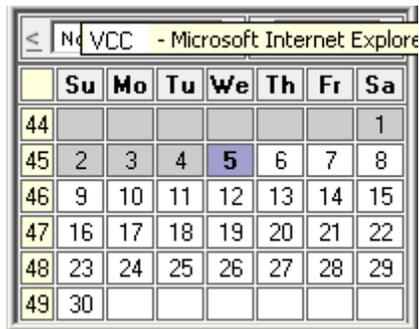
- Header:** 'Individual' and 'Group' tabs.
- Navigation:** 'List' and 'Create' buttons.
- Basic Information:**
 - * Name: [Text Box]
 - Group To Display: [None] (Dropdown)
 - Effectivity Dates (mm/dd/yy) - Start: [Text Box] [Calendar Icon] End: [Text Box] [Calendar Icon]
 - Aggregate On: Product
 - Number Of Levels Down: Product
 - UOM: [Base Units] (Dropdown)
 - Share with: [None] (Dropdown)
- Period Settings:**
 - Period: Base Periods Period Overlay
 - Fixed Rolling
 - [All Periods](#)
 - Aggregate On Period
- Comparison Settings:**
 - Comparison: Current to Current Current to Previous Threshold
 - Type 1: [Actual "Sales"] (Dropdown) Subtype: [ActualSales:Base] (Dropdown) Type 1 is: [Partner] (Dropdown)
 - Type 2: [Actual "Sales"] (Dropdown) Subtype: [ActualSales:Base] (Dropdown) Type 2 is: [Partner] (Dropdown)
 - Offset: None Period [Text Box]
 - Percent Formula: [(type 1-type 2)/type2]*100 (Dropdown)
- Thresholds and Severity:**
 - * Absolute Threshold: [Text Box] [Change] (Dropdown)
 - Percent Threshold: [Text Box] [Change] (Dropdown)
 - Severity: [None] (Dropdown)
 - Medium Severity: High Severity:
- Options:**
 - Trigger even if part of group
 - Treat missing value as zero
- Buttons:** [Create] [Cancel] [Advanced]

3. Enter a name (40 character maximum) in the **Name** text box.
4. The Group To Display drop-down allows you to select
 - from a list of groups that have already been created (Groups are created in the Company - General Config - Groups tab)
 - a group called "All", which includes all streams assigned to that company. The All group gets automatically updated whenever a new stream is assigned.
 - the "None" option, which will not display any groups.

Note: Only company-specific groups will display in the "Group to Display" drop-down. User-specific groups will not be available in this list.

5. Enter the **Start** and **End Effectivity Dates** manually or through the calendar icon. Click the calendar icon and a pop-up calendar appears allowing you to choose the dates. Double-click on a date in the pop-up calendar and it automatically appears in the Start or End Effectivity Date text box.

Figure 6–4 Calendar



This is an optional feature. You may choose not to enter any effectivity dates, or you may choose to enter a start date only, or an end date only.

Note: The effectivity end date cannot be prior to the current date.

6. If your context includes folder-level items, you may check any of "Product", "Local", or "Partner" to Aggregate On.

Once you check one of the boxes, a text field next to Number of Levels Down will be activated. You can enter a number in the box, though it is not required. If you do not select a specific number of levels down, your criteria will be created at that aggregate context.

When the "Aggregate On" check box is checked, the Number of Levels below text box appears (this option allows you to create multiple criteria all at once). For example, if you select "Aggregate On Product", an additional text box "Number of Levels below:" appears. This gives you the option of indicating at what level below the product context the exception criteria will be created.

The maximum number allowed in the "Number of Levels below:" text box is "99".

7. Select the UOM (unit of measure): "Base Units", "Stat Units", "Loads", or "Currency".
8. Choose the Partner Company you would like to share the Exceptions with, if any, by selecting from the Share with drop-down. The list of partner companies available in the Share With drop-down depend on the partner location/folder chosen in the context chooser. Exceptions cannot be shared with non-local partner companies.
9. Select whether you would like to use Base Periods or a Period Overlay for the Period. With either option, you will be given the choice to use "Fixed" or "Rolling" Time periods.

- Click **Fixed** to create an absolute time exception criterion.

Fixed Base Periods – when **Base Periods** is selected, choose a fixed period from the Period tree. If you wish to aggregate on that period, check the Aggregate On Period check box. This reports the aggregate on the selected dimension.

Fixed Period Overlay – when **Fixed Period Overlay** is selected, choose a period overlay from the drop-down and, optionally, set the period Start/End Dates/Periods by clicking the Set Period Range check box. In version 6.1, only

1 criteria is created per fixed Period Overlay, where previous versions created a criteria per period overlay item.

Note: Period ranges are evaluated in terms of base periods - days in a daily database, weeks in a weekly database.

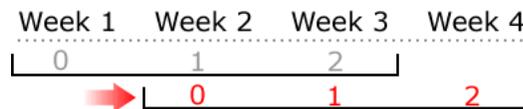
- Click Rolling to create a relative time exception criterion.

Rolling Base Periods – when a **Rolling Base Period** is selected, enter the Start Period and End Period.

Rolling Period Overlay – when a **Rolling Period Overlay** is selected, choose the desired overlay from the drop-down. The "Set Period Range" option is not available for Rolling Period Overlays.

In a Rolling time exception criterion, zero indicates the current period, "1" indicates begin one period from the current period. For example, if you enter "0" in the start period and "2" in the end week, the exception criterion applies to the current week and two periods into the future. The exception criterion moves forward automatically with each passing period. That is, after the first period ends in which the rolling time exception criterion applies, the start period that was period "1" becomes period "0" and so forth.

Figure 6–5 Rolling Time Exception Criterion



To roll a relative criteria, you must schedule the "Roll Criteria" task. See [Working with Tasks](#). Every time the "Roll Criteria" task is run, it obsoletes the exception triggered by the first period. For instance, in the example given above, the exceptions triggered by the Week 1 "0" period would be obsoleted.

10. In the Comparison section, you can determine

- what comparison type you wish to use
- what data streams and substreams are to be compared
- whether the streams are local or partner
- whether there is an offset
- what formula will be used in the calculation

There are three comparison modes, as follows:

- Current to Current Comparison – allows you to compare
 - **no offset**
 - local current data stream with partner current data stream
 - local current data stream with local current data stream
 - partner current data stream with local current data stream
 - partner current data stream with partner current data stream
 - **and period offset comparisons**
 - local current with local period offset
 - local current with partner period offset

partner current with local offset

partner current with partner period offset

When selecting a Percent Formula in Current to Current Comparison mode, you can only select formulas 2, 3, or 4 if Stream Type 1, Stream Type 2, and Stream Item Types are the same, and if both subtypes and "Type 1 is:" and "Type 2 is:" are different (e.g., both are not Local, or both are not Partner):

$[(\text{type 1} - \text{type 2}) / \text{type 2}] * 100$

$[(\text{seller} - \text{buyer}) / \text{buyer}] * 100$

$[(\text{buyer} - \text{seller}) / \text{seller}] * 100$

$[\max(\text{buyer}, \text{seller}) - \min(\text{buyer}, \text{seller})] / \min(\text{buyer}, \text{seller}) * 100$

- Current to Previous Comparison – allows you to compare
 - your local current data stream with your local previous data stream (only when offset is set to "none")
 - your partner's current data stream with your partner's previous data stream (only when offset is set to "none")
 - your local current data stream with your partner's previous data stream (only with generational offset)
 - your local current data stream with your previous data stream. (only with generational offset)
 - your partner's current data stream with your local previous data stream. (only with generational offset)
 - your current data stream with your local previous data stream. (only with generational offset)

Note: The last four cases are only possible when a generational offset is chosen.

- Current to Threshold Comparison – allows you to compare your local current data stream or your partner's current data stream with an absolute threshold value.

11. Set the **Absolute Threshold**, the **Percent Threshold** field, or both. Enter the value that the data stream must vary to trigger the exception.

Choose the type of change (Increase, Decrease, or Change) for the exception criterion from the drop-down list next to the **Percent Threshold** or the **Absolute Threshold** field.

Note: If the comparison type is Current to Threshold, only **Absolute Threshold** is available. Also, "Above Threshold" and "Below Threshold" are the only options in the drop-down list.

- Select "Change" if the exception applies to any increase or decrease in the threshold value.
- Select "Increase" if the exception applies to an increase in the threshold value.
- Select "Decrease" if the exception applies to a decrease in the threshold value.

12. Choose the **Severity** ("None", "Percent", or "Absolute") to match your threshold criteria and enter the values for **Medium Severity** and **High Severity** levels. For more details on Severity Levels, see [Exception Severity Levels](#).

Note: The severity for all Current to Threshold exceptions is based on the base quantity and not on the deviation.

All exceptions that are generated from criteria where the medium and high thresholds were not provided, will always trigger exceptions with a "Low" severity.

13. Check the **Trigger even if part of group box** if the exception is to be triggered even if it is part of a group exception. For example, if the exception you are creating is to be part of a group exception and you want the exception to be triggered as a lone exception in addition to being triggered as part of the group, check the box.
14. Check the **Treat missing value as zero box** if you wish to treat a null value in a data stream as a zero for comparison purposes. When a criteria has the "Treat missing value as zero" option checked, trading partners are allowed to identify new promotions even when they have not planned them themselves.

Note: If not used carefully, value vs. null exceptions can lead to many spurious exceptions.

15. Click **Advanced** to set automated resolution options, or click **Create**. If you click **Create**, the exception criterion appears in the **Exceptions - Criteria - Individual - List** screen in the **Display** pane. You may also click **Cancel** to cancel the creation of exception criterion and return to the **Exceptions - Criteria - Individual - List** screen.

About Automated Exception Resolution with the Action Specification Screen

The VCC's Automated Exception Resolution feature automatically adjusts values, changes status, and notifies individuals based upon rules specified when an exception occurs, or after a time-out passes.

Automated resolution expands the range of possible actions associated with each severity level (low, medium, and high) of an exception criterion to the following:

- Adjusting a local data stream value. The options include
 - matching to local value (when a stream to adjust is other than type 1 or type 2).
 - matching to partner value.
 - using the higher or lower of the partner and local values.
 - using the average of the partner and local values.
- Changing the status of the exception. The options include
 - None
 - Auto
 - Auto Dismissed
 - Auto In-Process

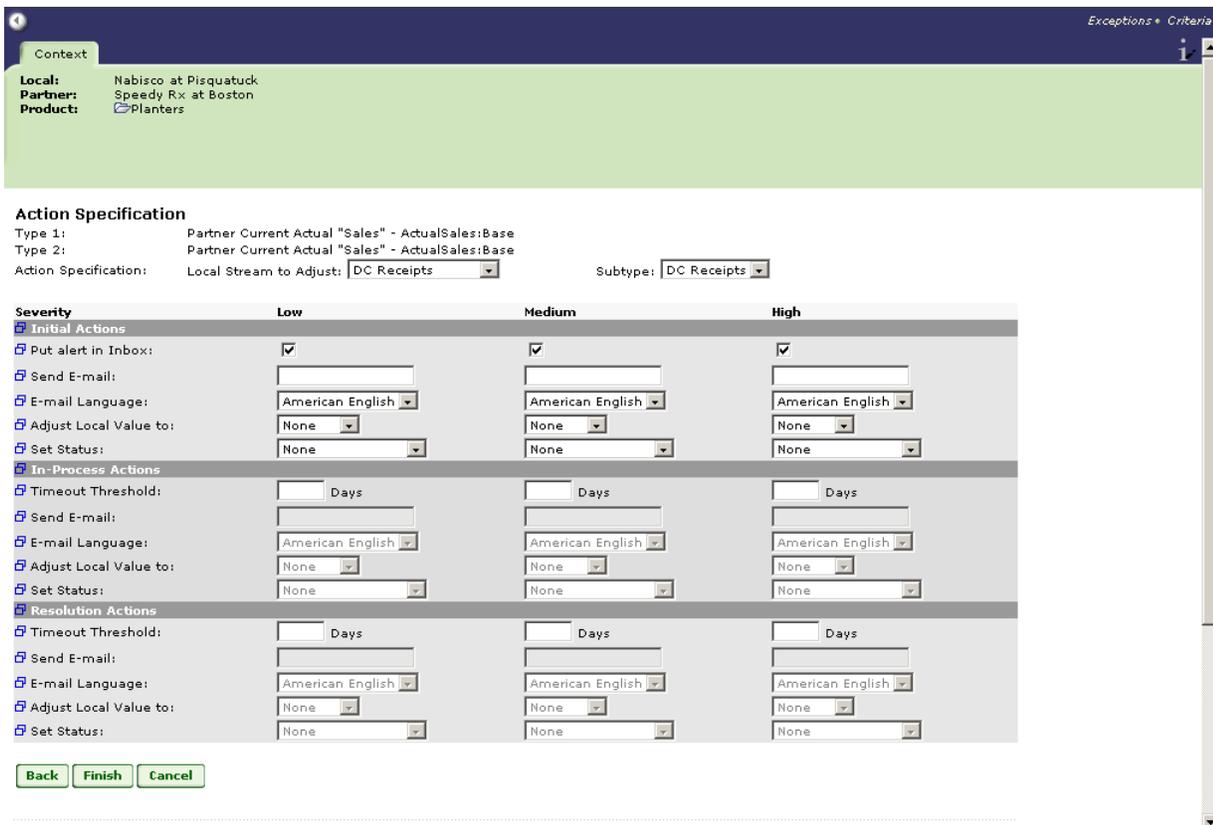
- Auto Resolved
- Auto Unresolvable
- Auto Escalated
- Sending an e-mail message.
- Selecting an E-mail Language.
- Displaying a message in the Exceptions Inbox.

Automated resolution includes one set of initial actions and two time-out action specifications for In-Process and Resolution actions. One identifies a potentially different set of actions to be taken if the exception was not marked "In-Process" or "Auto In-Process" in a prescribed amount of time. The other triggers another selection of actions if the exception were not resolved before the time out expired.

If an exception is superseded before the time out expires, the original exception's creation date/time will be used as the basis for evaluating the exception action rule if the severity is the same or higher on the exception that superseded the original.

After you click the **Advanced** button at the bottom of the Exceptions - Criteria - Individual - Create screen, you can set the automated exception resolution options.

Figure 6–6 Automated Exception Resolution Options



The screen allows you to set three types of actions:

Note: When actions defined on multiple criteria result in changing the same stream values, the actions defined on the criteria created latest will override the previous criteria actions.

- Initial Actions – performed when the exception is triggered.
- In-Process Actions – performed after the specified in-process time out has passed but the exception is still active. For example, if an exception's status changes to In-Process/Auto In-Process before the specified time out has passed, In-Process actions are not performed. If the exception's status has not changed to In-Process/Auto In-Process, and the specified time out has passed, In-Process actions are performed.
- Resolution Actions – performed when the specified resolution time out has passed, and the exception is still not resolved.

Note: All actions are severity-specific.

To configure Automated Exception Resolution

1. Select the stream and substream to be adjusted at the end of Action Processing from the "Local Stream to Adjust" and Sub Type drop-down lists.

Initial Actions

2. Check the "Put alert in Inbox" check-box for each exception severity level (low, medium, and high) that is to be displayed in the Inbox when that threshold is exceeded. The check-box is checked by default.
3. In the "Send E-Mail:" text box, enter the e-mail address of the person(s) to be notified if the exception is triggered at the chosen severity level (optional). When entering more than one e-mail address, separate each address with either a semicolon (;) or comma (.). To view sample e-mail alerts, see [Exception Inbox E-Mail Alerts](#).

Note: The "from" e-mail address used for all e-mail notifications (e.g., exception alerts or usage reports) will show the E-Mail address that was set in **Configuration - Server-Messaging - Sender E-Mail**. For details see the *Oracle Retail VCC Installation and Configuration Guide*.

4. In the "E-mail Language:" drop-down, you can set the language that the e-mail will be generated in. The default will be whatever language has been selected on the Preferences - General screen.
5. Select the "Adjust Local Value" from the drop-down list:
 - None – makes no change
 - Type 1/Type 2 – depending on your criteria (local current to partner current, or partner current to local current), adjusts your local value to your partner's value. For example:
 - local current to partner current: Type 2 adjusts local value to match your partner's

- partner current to local current: Type 1 adjusts local value to match your partner's
 - Higher – changes your local value to your partner's value if your partner's value is higher
 - Lower – changes your local value to your partner's value if your partner's value is lower
 - Average – changes to an average of your partner's and your values.
6. Set the status from the "Set Status" drop-down list. The Set Status option has the following values:
- None
 - Auto Dismissed
 - Auto In-Process
 - Auto Resolved
 - Auto Unresolvable
 - Auto Escalated

Note: When "None" is selected from the **Adjust Local Value** drop-down list, you can manually select "Auto Dismissed", "Auto In-Process", "Auto Resolved", or "Auto Unresolvable" or "Auto Escalated" from the **Set Status** drop-down list. If you select any other **Adjust Local Value** item is chosen, the status is automatically set to "Auto".

Table 3 shows all the possible status options depending the Stream to Adjust and the adjustment method chosen.

Table 6–2 Auto Status Options

Stream		Adjust Method Status Code							
Type 1 (Source)	Type 2 (Compare)	Type 3 (Local Stream to Adjust)	None	Type 1	Type 2	Higher	Lower	Average	
Local Current	Partner Current	1	S1	S2	-	S3	S3	S4	
Local Current	Partner Current	3	S1	-	S7	S7	S7	S7	
Partner Current	Local Current	2	S1	S2	-	S3	S3	S4	
Partner Current	Local Current	3	S1	S7	-	S7	S7	S7	
Local Current	Local Previous	1	S1	-	S2	S8	S8	S10	
Local Current	Local Previous	3	S1	-	S7	S7	S7	S7	
Local Current	Local Generation Offset	1	S1	-	S2	S8	S8	S10	
Local Current	Local Generation Offset	3	S1	-	S7	S7	S7	S7	
Local Current	Local Period Offset	1	S1	-	S2	S8	S8	S10	
Local Current	Local Period Offset	3	S1	-	S7	S7	S7	S7	
Partner Current	Partner Previous	3	S1	-	S9	S9	S9	S9	

Table 6–2 (Cont.) Auto Status Options

Stream			Adjust Method Status Code					
Type 1 (Source)	Type 2 (Compare)	Type 3 (Local Stream to Adjust)	None	Type 1	Type 2	Higher	Lower	Average
Partner Current	Partner Generation Offset	3	S1	-	S9	S9	S9	S9
Partner Current	Partner Period Offset	3	S1	-	S9	S9	S9	S9
Local Current	Threshold	1	S1	-	S2	S8	S8	S8
Local Current	Threshold	3	S1	-	S7	S7	S7	S7
Partner Current	Threshold	3	S1	-	S9	S9	S9	S9

The following rules apply when using auto status adjustment:

- If the Local Stream to Adjust is equal to
 - 1, the stream specified for Type 1 is adjusted
 - 2, the stream specified for Type 2 is adjusted.
 - 3, some other specified stream is changed
- If Local Current is changed to eliminate the exception, the status is "Resolved"
- If a third stream is changed as a result of the exception, the status is "In-Process".
- If no data is changed, the status remains "Active"

Table 4 shows the status codes used in Table 3. Table 3 also provides the reason codes (and their description) that appear in the Comments screen when that status option is triggered.

Table 6–3 Status Codes

Status Type	Status	Set Resolution Description
S1	Active	none
S2	Auto Resolved	Local issue: changed value: The local value was adjusted to match the partner's value, because a local error was discovered.
S3	If the change is made: Auto Resolved; Otherwise: Auto In-Process	If the change is made, local issue, changed value: The local value was adjusted to match the partner's value, because a local error was discovered. If the change is not made, partner issue: value unchanged: A partner's error was discovered, and is expected to be corrected in the next planning cycle.
S4	Auto Resolved	Split the difference: The partner and local values were both set to the average of the original values.
S5	Auto Unresolvable	Agree to disagree: Partner and local stand by their differing values.
S6	Active	Not Resolved: The issue has not yet been resolved. (default)

Table 6–3 (Cont.) Status Codes

Status Type	Status	Set Resolution Description
S7	Auto In-Process	Local issue, value unchanged: A local error was discovered, and is expected to be corrected in the next planning cycle.
S8	If the change is made: Auto Resolved; Otherwise: Auto In-Process	If the change is made, local issue, changed value: The local value was adjusted to match the partner's value, because a local error was discovered. If the change is not made, partner issue: value unchanged: A partner's error was discovered, and is expected to be corrected in the next planning cycle.
S9	Auto In-Process	Partner issue: value unchanged: A partner's error was discovered, and is expected to be corrected in the next planning cycle.
S10	Auto In-Process	Local issue, changed value: The local value was adjusted to match the partner's value, because a local error was discovered

In-Process Actions

7. Set "Time Out Threshold".
8. In the "Send E-Mail:" text box, enter the e-mail address of the person(s) to be notified if the exception has passed the time-out threshold and the exception status has not changed to "In-Process" or "Auto In-Process".
9. In the "E-mail Language:" drop-down, you can set the language that the e-mail will be generated in. The default will be whatever language has been selected on the Preferences - General screen.
10. Select the "Adjust Local Value" from the drop-down list, as in step 5.
11. Set your status from the "Set Status" drop-down list, as in step 6. The Set Status option has the following values.

Resolution Actions

12. Set "Time Out Threshold".
13. In the "Send E-Mail:" text box, enter the e-mail address of the person(s) to be notified if the exception has passed the time-out threshold and is still in a status of Active, In-Process, or Auto In-Process, Escalated, Auto-Escalated, Auto Incomplete.
14. In the "E-mail Language:" drop-down, you can set the language that the e-mail will be generated in. The default will be whatever language has been selected on the Preferences - General screen.
15. Select the "Adjust Local Value" from the drop-down list, as in step 5.
16. Set your status from the "Set Status" drop-down list, as in step 6. The Set Status option has the following values.
17. Click **Finish**.

Note: If you have similar entries across multiple severity levels, you can save time by clicking the copy buttons located to the left of each action. Clicking on the copy icons next to "Initial Actions", "In-Process Actions", and "Resolution Actions" will copy ALL the settings from the low severity column into both the Medium and High columns.

Creating Group Exception Criteria

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer. However, planners and reviewers cannot create or delete group exception criteria.

The Group screen lets you create one significant exception instead of many independent exceptions in the situation where independent exceptions are meaningless unless all of their thresholds are exceeded. This feature eliminates a vast number of unwanted exceptions. For example, you can create a group exception criteria for "All Natural Potato Chips" that triggers an exception when sales drop by 7 percent, or by 600 cases and 5 percent.

The Group screen, shown below, comprises two subscreens: **List** and **Create**. The **List** screen shows the group exceptions for your selected context.

The **Create** allows you create group exception criteria. To create group exception criteria

1. Select your context.
2. Click **Exceptions - Criteria - Group - Create** from the Oracle Retail VCC menu, and the following screen appears:

Figure 6–7 Creating Group Exception Criteria

3. Enter a name (40 character maximum) in the text box next to "Name:".

4. In the "E-Mail:" text box, enter the e-mail of the person(s) to be notified when a group exception is triggered (optional).
5. Select the E-mail Language you would like to have any e-mail sent in, if you opted to have group exceptions trigger an e-mail alert.

Note: The default "E-mail Language" will be whatever language has been selected on the Preferences - General screen.

6. Select whether you wish to trigger if matched on Context and Period, Context Only or Period Only. Trigger if matched on options are
 - Context and Period – A group exception will be triggered only if all the criteria (based on the "AND" or "OR" rules) in the group trigger an exception for the same context and period.

For example, if you create a group criteria with the following rules:

Criteria A, Location 1, Partner 1, Product 1, which is for periods 1 through 5

OR Criteria B, Location 1, Partner 1, Product 1, which is for periods 3 through 7

AND Criteria C, Location 1, Partner 1, Product 1, which is for periods 2 through 4

The following example condition will trigger a group exception:

Criteria A triggered in period 3, Criteria B triggered in period 4, and Criteria C triggered in periods 2, 3, and 4. In this condition, you will receive two group exceptions for periods 3 and 4.

The following example condition will not trigger a group exception:

Criteria A triggered in period 1, Criteria B triggered in period 5, and Criteria C triggered in period 3. In this condition you will not receive any group exceptions.

- Context Only – A group exception will be triggered only if all the criteria in the group trigger an exception for the same context.
- Periods Only – A group exception will be triggered only if all the criteria in the group trigger an exception for the same period.

Note: When "Context and Period" is selected, the "OR", "AND" and "REMOVE" options are accessible. If "Periods Only" or "Context Only" are selected, "OR" will not be available. Only "AND" and "REMOVE" will be accessible.

7. Enter the **Start** and **End Effectivity Dates** manually or through the calendar icon. Click the calendar icon and the following calendar pops up to help you choose the dates. Double-click on a date and it automatically appears in the Start or End Effectivity Date text box.

Figure 6-8 Calendar

	Su	Mo	Tu	We	Th	Fr	Sa
44							1
45	2	3	4	5	6	7	8
46	9	10	11	12	13	14	15
47	16	17	18	19	20	21	22
48	23	24	25	26	27	28	29
49	30						

This is an optional feature. You do not have to enter any effectivity dates, or you may choose to enter a start date only, or an end date only.

Note: The effectivity end date cannot be prior to the current date.

8. Add the individual exception criteria to be included in the group exception criteria by highlighting the individual exception criteria in the left window. Then, click the rule (either an "And" or "Or" condition) to be used for triggering the group exception. The exception criteria will appear in the right window.

Note: A group exception will be triggered only if all the criteria (based on the "AND" or "OR" rules) in the group trigger an exception for the same context, same period, or same context and period. This is determined by the "Trigger if matched on" option selected. For more "Trigger if matched on" details, see Step 6.

In previous versions, the list of criteria from which you could select was limited to only those criteria that had the same context as the selected context. Now all the criteria at and below the selected context are displayed.

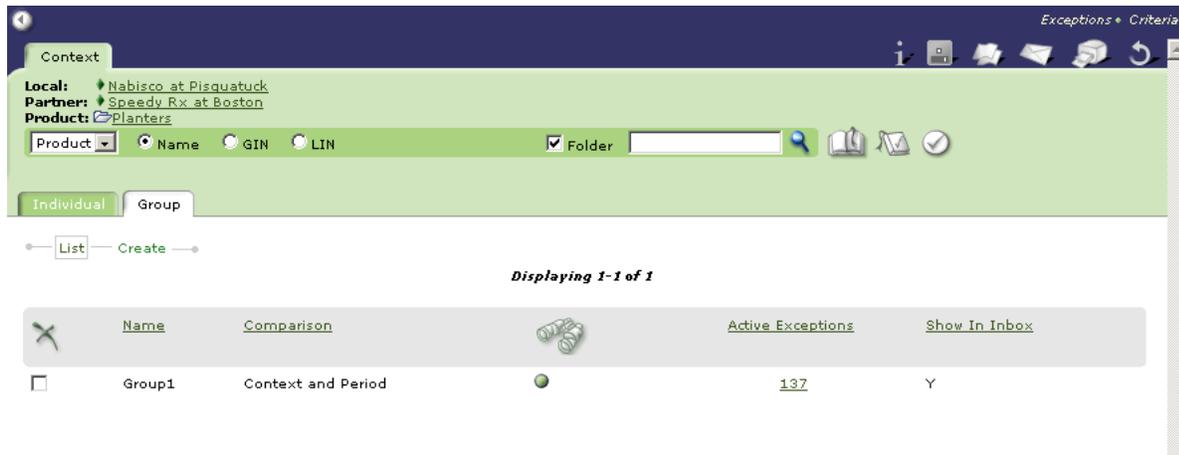
Highlight an exception criteria in the right window and click **Remove** to remove items from the group exception list.

9. Put alert in Inbox displays the group exception in the inbox when checked. The default is checked.
10. Click **Create**. The group exception criteria will appear in the **Exceptions - Criteria - Group - List**.

Group Exception Criteria

To delete a group exception criterion, access the Exception - Criteria - Group - List screen. Check the box next to the name and click **Delete**.

Figure 6–9 Exception - Criteria - Group - List Screen



To examine Group Exception Criteria, click on the colored dot next to each name. The following screen appears showing a detailed list of all the exception criteria that comprise the group exception criteria.

Figure 6–10 Examine Group Exception Criteria



Active Exceptions can be viewed by clicking on the number link that appears in "Active Exceptions" column of the Group List screen. This will display Active Group Exception Criteria, as seen in the list below.

Figure 6–11 Active Group Exception Criteria

The screenshot shows the Oracle Retail VCC interface for viewing exception criteria. At the top, there is a 'Context' section with the following details:

- Local:** ab_padkro-All Locations
- Partner:** ab_padkro-All Partners
- Product:** ab_padkro-All Products

Below the context section are three buttons: **Back**, **Apply Changes**, and **View Expanded**. The main area displays a table of exception criteria with the following columns: Criteria Name, Period, Product, Local, Partner, Created, Status, Status History, and Collapsed Count. The table shows one entry:

Criteria Name	Period	Product	Local	Partner	Created	Status	Status History	Collapsed Count
15656	multiple	1111111111_111-1111 EGYPT FLFLT YELLOW	localco Reg_Hier1	partnerco Reg_Hier	multiple	N/A		18

Exception Severity Levels

Oracle Retail VCC allows you to assign severity levels to exceptions to help you quickly identify the severity of an exception in the exception inbox. To create severity levels for an exception you set a medium severity limit and a high severity limit. The low severity limit automatically sets itself as being any value that is below medium severity and above the deviation threshold.

Note: All exceptions that are generated from criteria where the medium and high thresholds were not provided, will always trigger exceptions with a 'Low' severity.

The severity for all Current to Threshold exceptions is based on the base quantity and not on the deviation.

For example, you create an absolute exception criteria with an exception deviation of 100, a medium severity limit of 120, and a high severity limit of 150. If the deviation is 99 or below, no exception is generated. If the deviation is between 100 and 119, the exception would be low. If the deviation is between 120 and 150, the exception would be medium. If the deviation is greater than 150, the exception would be high.

The same is true for percent deviation exceptions except calculations are done as a percent of the data stream value. For example, you set the exception percent at 20%, the medium threshold at 30%, and the high threshold at 50%.

If the result is between +/-19%, there would be no exception. If the result is between -20% and -30% or +20% and +30%, the exception would be low. If the result is greater than -30% and -49% or +30% and +49%, the exception would be medium. If the result is greater than +50% or less than -50%, the exception would be high.

Viewing Exception Criteria

Access to this feature: superadmin, admin, manager, supervisor, planner, and reviewer.

To view the exception criteria you have created, you must set a **context** and then view exception criteria for that context. You then can elect to display all exception criteria at and above the context you selected, or at and below the context you selected.

To view the exception criteria that have been created for a context

1. Set your context.
2. Click **Exceptions - Criteria**.
3. Click **Context Chooser - Display Mode** and from the drop-down list select "Show criteria at and above this context" to display all exception criteria created at and above the selected context; or, select "Show criteria at and below this context" to display all exception criteria created at and below the selected context.

For example, to display all exception criteria created for all locations, all partners, and all products at and below a context

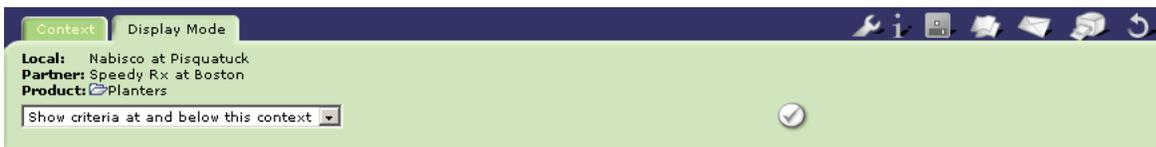
1. Click **Context Chooser - Select Context** and select "All Locations", "All Partners", and "All Products".

Figure 6–12 Context Chooser - Select Context



2. Click **Context Chooser - Display Mode** and select "Show criteria at and below this context."

Figure 6–13 Context Chooser - Display Mode



3. Click the "Set" button.

Viewing Active Exceptions

To view the active exceptions associated with a criterion for a context listed in the **Exceptions - Criteria - List** screen

1. Click on the number in the **Active Exceptions** column, which takes you to an inbox view that contains only the active exceptions (active, in-process, auto in-process, supersedes, escalated, auto escalated, auto incomplete) for that criteria.
2. You can perform all the operations (view exception, view criteria, view status history, and change exception status) that can be performed in the Exceptions Inbox. For details, see [Viewing Exceptions and Exception Data](#).

Note: If you change an exception's status to resolved, unresolvable, or dismissed and click on the Back button, taking you back to the Exceptions - Criteria - List page, you must refresh the screen before the new Active Exception Count appears.

3. Click Back to return to the **Exceptions - Criteria - List** screen.

Viewing Exception Criteria and Details from the Exceptions - Criteria - List Screen

To display a read-only view of the exception criterion from the **Exceptions - Criteria - List** screen, click the colored dot below the "View" icon. For details on how the screen looks see [Creating Individual Exception Criteria](#).

Copying Exception Criteria

To copy exception Criteria, navigate to the Criteria List screen and select the copy icon for that criterion (located in the "Copy Criterion" column). Copying a criterion duplicates the original criterion's settings. A name must be entered for the new copy, but does not need to be unique.

Deleting Exception Criteria

Access to this feature: superadmin, admin, manager, and supervisor.

To delete an exception criterion, click **Exceptions - Criteria - Individual - List**. Click the check box below the "Check" column next to the exception criterion, and then click **Delete**.

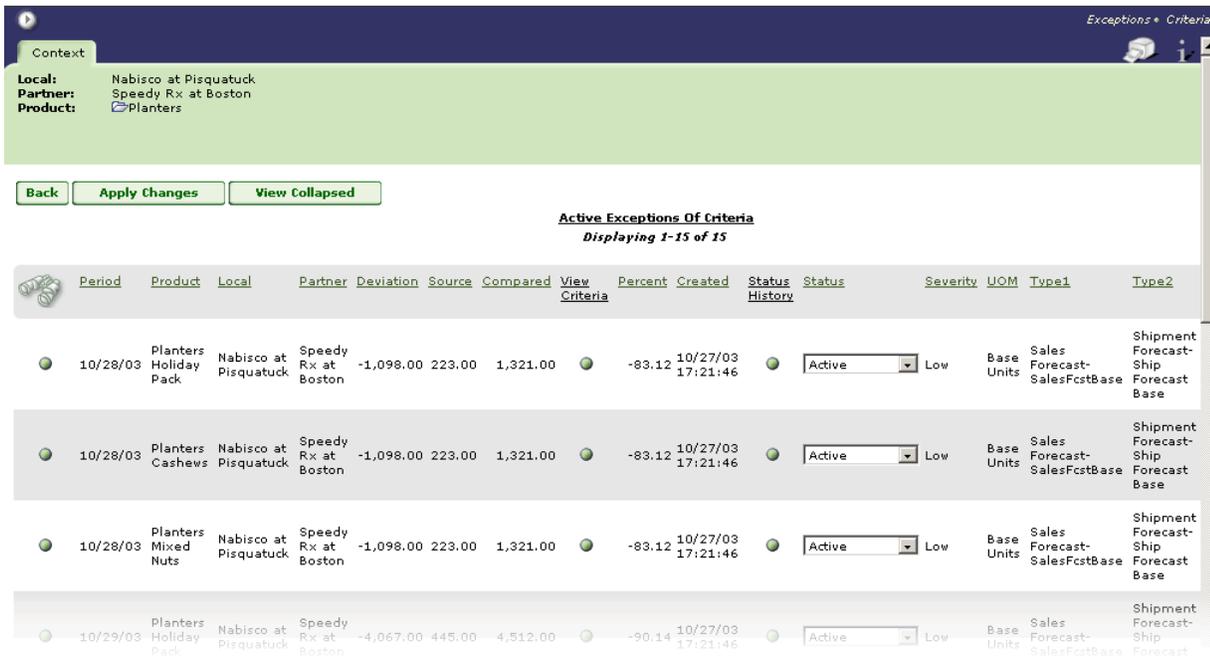
The **Delete** check box is available next to the criteria at or below the current context. Criteria above the current context do not have the **Delete** check box next to them.

Viewing an Exception's Status History from the Active Exceptions Screen

To view the status history of an exception from the **Active Exceptions** screen

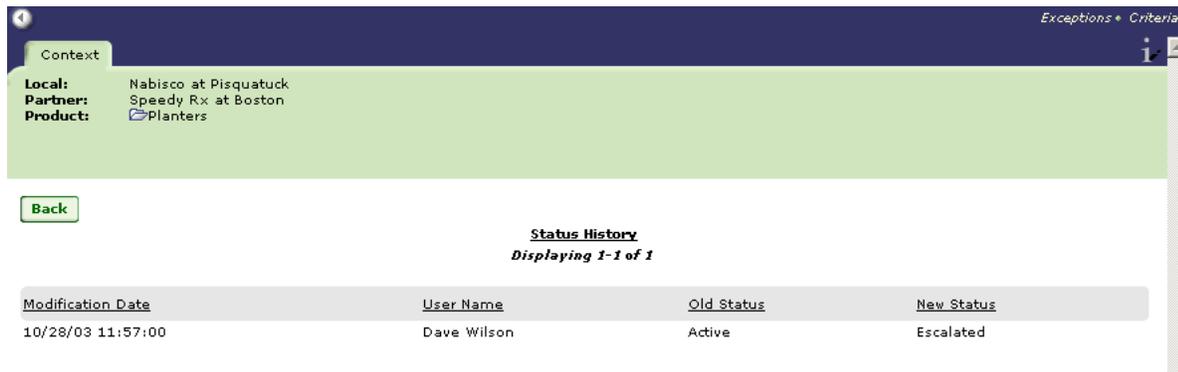
1. Click **Exceptions - Criteria - Individual - List**.
2. Click the number link in the **Active Exceptions** column. This number represents the total of active exceptions contained in that criteria. The Active Exception Criteria screen appears.

Figure 6–14 Active Exception Criteria Screen



- Click the Status History drilldown dot to view the status history of that exception. The Status History screen appears.

Figure 6–15 Status History Screen



- Click **Back** to return to the Active Exceptions List.
- Click **Back** again to return to the Criteria - List screen.

Changing an Exception's Status from the Exception Inbox Screen

To change an exception's status

- Click **Exceptions - Inbox - Individual**.
- Select a status from the **Status** drop-down list.
 - In-Process:

- Resolved
 - Unresolvable
 - Dismiss
 - Escalated
3. Click **Apply Changes**.

Note: If you change an exception's status in the **Exceptions - Criteria drilldown - Active Exceptions link - Active Exception list page**, you must refresh the screen before the new Active Exception Count appears.

Processing Exception Criteria on Demand

Access to this feature: superadmin, admin, manager, and supervisor.

Exception criteria processing occurs as a background task controlled by the Oracle Retail VCC Scheduler (see [Managing the Scheduler](#)). You can, however, process a single exception criterion "on demand" without having to schedule and execute the task through the scheduler. This is called on-demand exception criteria processing. It allows you to process one exception criterion and view the results immediately.

Note: If you create a criterion at the aggregate level that uses a Sum, the criterion is created with a "Pending" status. One must first run "Complete Criteria Creation" through the Scheduler before the criterion becomes "Valid" and available for on-demand processing.

To process a single exception criterion "on demand" without having to schedule and execute the task through the Scheduler

1. Set your context.
2. Click **Exceptions - Criteria - Individual** from the Oracle Retail VCC menu. The individual exception criteria are listed in the **Display** pane.
3. Click the "Process On Demand" radio button next to the exception criteria that you want to process. You may only select one criteria to process at a time.

Figure 6–16 Process On Demand

Displaying 1-1 of 1

Offset	Local	Partner	Product	UOM	Status	Process On Demand	Severity	Medium Severity	High Severity	Trigger Even If Part Of Group	Active Exceptions	Shared With
		Nabisco at Pisquatuck	Speedy Rx at Boston	Planters Units	Base Units	Valid	<input type="radio"/>				15	None

4. Click **Process On Demand**.

Exception Inbox E-Mail Alerts

The number format, date format, time format, time zone and decimal places specified in the Company - General Config - E-mail tab will be applied to the Exception E-mail

Alert. Default E-mail format, visible columns and multi-column sort order rules specified in the Company -Module Config - Exceptions tab will be applied to Exception E-mail Alerts.

In addition to the individual and group exceptions that are displayed in the E-Mail alert, there are links. Both Plain text and HTML formats provide access to the following screens:

- **Inbox** – Opens the Exception Inbox screen that displays the selected context and exceptions.
- **View Exception** – Opens the Exception Detail screen.
- **Group Inbox** – Opens the Group Inbox screen that displays the selected context and exceptions.

These links will return you to different Oracle Retail VCC exception views. You will need to log into the application to view the details for each link if you are not already logged in.

Sample HTML E-Mail Alert

Figure 6–17 Sample HTML E-Mail Alert

Individual Exceptions															
Criteria Name	Severity	Go To	Go To	Product	Local	Partner	Variance	Source	Compared	Percent	Created	Status	UOM	Type1	Type2
I3	Medium	Inbox	View Exception	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	20.0	62.0	42.0	47.62	01/09/03 12:01:20	Active	Base Units	POS Forecast (Units)-POS Forecast (Seas)	POS Forecast (Units)-POS Forecast (Seas)
I3	High	Inbox	View Exception	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	30.0	52.0	22.0	136.36	01/09/03 12:01:20	Active	Base Units	POS Forecast (Units)-POS Forecast (Seas)	POS Forecast (Units)-POS Forecast (Seas)
I3	Medium	Inbox	View Exception	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	20.0	72.0	52.0	38.46	01/09/03 12:01:20	Active	Base Units	POS Forecast (Units)-POS Forecast (Seas)	POS Forecast (Units)-POS Forecast (Seas)
Group Exceptions															
Go To	Criteria Name	Period	Product	Local	Partner	Created									
Group Inbox	CO&PO	01/10/03	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22									
Group Inbox	CO&PO	01/11/03	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22									
Group Inbox	CO&PO	01/12/03	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22									
Group Inbox	CO&PO	01/10/03	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22									
Group Inbox	CO&PO	01/11/03	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22									
Group Inbox	CO&PO	01/12/03	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22									
Group Inbox	CO&PO	01/10/03	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22									
Group Inbox	CO&PO	01/11/03	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22									
Group Inbox	CO&PO	01/12/03	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22									
Group Inbox	CO	-	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:23									
Group Inbox	CO	-	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:23									
Group Inbox	CO	-	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:23									
Group Inbox	PO	01/10/03				01/09/03 12:01:23									
Group Inbox	PO	01/11/03				01/09/03 12:01:23									
Group Inbox	PO	01/12/03				01/09/03 12:01:23									

Sample Text E-Mail Alert

Figure 6–18 Sample Text E-Mail Alert

<p>Individual Exceptions</p> <p>Criteria Name: I3 Severity: Medium View Inbox : https://diana1/estrella/isp/common/frames.do?screen%3DexceptionInbox%26subscreen%3Dindividual_exception_inbox%26location%26partner%3D4%26prodleaf%3Dtrue%26product%3D0125468712 View Exception: https://diana1/estrella/isp/common/frames.do?screen%3DdatastreamsDefaultView%26exceptionId%3D282%26location%3D9%26prodleaf%3Dtrue%26product%3D0125468712 Product: Planters Mixed Nuts Local: Nabisco at Pisquatuck Partner: Speedy Rx at Boston Variance: 20.0 Source: 70.0 Compared: 50.0 Percent: 40.0 Created: 01/09/03 14:04:59 Status: Active UOM: Base Units Type1: POS Forecast (Units)-POS Forecast (Seas) Type2: POS Forecast (Units)-POS Forecast (Seas) Offset: Period: 01/10/03</p> <p>Group Exceptions</p> <p>View Group Inbox : https://diana1/estrella/isp/common/frames.do?screen%3DexceptionInbox%26subscreen%3Dgroup_exception_inbox%26location%26partner%3D4%26prodleaf%3Dtrue%26product%3D0125468712 Criteria Name: Lang-COPO Period: 01/10/03 Product: Planters Mixed Nuts Local: Nabisco at Pisquatuck Partner: Speedy Rx at Boston Created: 01/09/03 12:57:11 Status: Active</p> <p>View Group Inbox : https://diana1/estrella/isp/common/frames.do?screen%3DexceptionInbox%26subscreen%3Dgroup_exception_inbox%26location%26partner%3D4%26prodleaf%3Dtrue%26product%3D0125468712 Criteria Name: Lang-COPO Period: 01/11/03 Product: Planters Mixed Nuts Local: Nabisco at Pisquatuck Partner: Speedy Rx at Boston Created: 01/09/03 12:57:11 Status: Active</p>

Data Stream Exception Criteria Formulas

Oracle Retail VCC generates data stream exceptions based on the specific formula for the data stream exception criteria comparison type you select. Oracle Retail VCC provides one general formula that can be used by each comparison type ("current to current", "current to previous" (default), and "current to threshold" (default)), and three formulas that are only options for the current to current comparison mode.

When you create a data stream exception criterion to compare any two data streams or substreams using the "current to current", "current to previous", or "current to threshold" comparison type, Oracle Retail VCC uses the following formula to calculate exceptions based on **absolute** value:

$$\text{Deviation} = \text{type 1} - \text{type 2}$$

When you create a data stream exception criterion to compare any two data streams or substreams using the "current to current", "current to previous", or "current to threshold" comparison type Oracle Retail VCC uses the following formula to calculate exceptions based on **percentage** value:

Figure 6–19 Formula to Calculate Exceptions Based on Percentage Value

$$\text{Deviation} = \left(\frac{\text{type 1} - \text{type 2}}{\text{type 2}} \right) * 100$$

When you create a "seller to buyer" data stream exception criterion based on the "current to current" comparison type, Oracle Retail VCC uses the following formula to calculate exceptions based on an **absolute** value:

$$\text{Deviation} = \text{seller} - \text{buyer}$$

When you create a "seller to buyer" data stream exception criterion based on the "current to current" comparison type, Oracle Retail VCC uses the following formula to calculate exceptions based on a **percentage** value:

Figure 6–20 Formula to Calculate Exceptions Based on a Percentage Value

$$\text{Deviation} = \left(\frac{\text{seller} - \text{buyer}}{\text{buyer}} \right) * 100$$

When you create a "buyer to seller" data stream exception criterion based on the "current to current" comparison type, Oracle Retail VCC uses the following formula to calculate exceptions based on an **absolute** value:

$$\text{Deviation} = \text{buyer} - \text{seller}$$

When you create a "buyer to seller" data stream exception criterion based on the "current to current" comparison type, Oracle Retail VCC uses the following formula to calculate exceptions based on a **percentage** value:

Figure 6–21 Formula to Calculate Exceptions Based on a Percentage Value

$$\text{Deviation} = \left(\frac{\text{buyer} - \text{seller}}{\text{seller}} \right) * 100$$

When you create a "maximum (buyer, seller) to minimum (buyer, seller)" data stream exception criterion based on the "current to current" comparison type, Oracle Retail VCC uses the following formula to calculate exceptions based on an **absolute** value:

$$\text{Deviation} = \text{max (buyer, seller)} - \text{min (buyer, seller)}$$

When you create a "maximum (buyer, seller) to minimum (buyer, seller)" data stream exception criterion based on the "current to current" comparison type, Oracle Retail VCC uses the following formula to calculate exceptions based on an **percentage** value:

Figure 6–22 Formula to Calculate Exceptions Based on a Percentage Value

$$\text{Deviation} = \left(\frac{\text{max (buyer, seller)} - \text{min (buyer, seller)}}{\text{min (buyer, seller)}} \right) * 100$$

This chapter contains the following topics:

- [Introduction](#)
- [About Reports](#)
- [Common Report Settings](#)
- [Creating Reports](#)
- [Generating Reports](#)
- [Deleting a Report](#)
- [Deleting a Template](#)

Introduction

Oracle Retail VCC allows you to generate various types of reports to show the progress of the collaboration between you and your trading partners.

Reports are created by a superadmin, admin, or manager. The report is scheduled to run through the Oracle Retail VCC Scheduler (See [Managing the Scheduler](#)). The reports continue to run at the frequency you choose until the report is deleted or the Scheduler job is deleted. The time frame for reports rolls forward in time. Sample report screens formats are shown in Appendix F Sample PDF Report Screens.

There are 10 report types:

- See [Comment](#) displays all data stream comments.
- See [Data Change](#) reports Data Stream values for the period selected, and compares them to last period, last week, and the same period last year. The report also includes data stream, local location, partner location and product.
- See [Data Stream](#) report contains no calculations other than summation; it extracts and formats multiple data streams for multiple contexts and multiple periods.
- See [Distributed Exception](#) report shows some or all existing exceptions, depending on the context. You can choose to see all exceptions or only exceptions with a certain status. You may choose to view exceptions of all severities or only exceptions of a particular severity.
- See [Exception Log](#) counts the exceptions under a given context.
- See [Extract](#) creates CSV and pipe (|) delimited reports for data streams. This report can be used to load data back into the Oracle Retail VCC system.

- See [Last Transaction](#). report is used to identify those products that might be purged based on lack of activity. It shows when the last transaction occurred for any given products.
- See [No Transaction](#). report identifies products with no transactions for any data streams.
- See [Promotion Detail](#) provides the details of each promotion.
- See [Promotion Detail](#) displays key promotion item information from multiple promotions.

Note: All of the above reports may not be available to you. Access to each of the reports is determined by the modules your company has purchased, and which ones you have been assigned.

About Reports

Reports are divided into three screens: List, Template, and Create.

Viewing Reports

The **Reports - List** screen allows you to view, sort, and delete the reports you have created.

Figure 7-1 Reports - List screen



- **Delete** – deletes the report when checked and **Apply Changes** is clicked. Click the Delete icon to select/deselect all items on the current page to be deleted. Click the individual check box to select/deselect that item to be deleted.
- **Edit (View)** – displays an editable view of the report when the colored dot below the "Edit" icon is clicked.
- **Override Execute Time** – overrides the execution time for the report when checked and **Process Selected Items** is clicked. Click the Override icon to select/deselect all items on the current page to be overridden. Click the individual check box to select/deselect that item to be overridden.

Reports are executed based on the frequency specified for each report. By selecting **Override Execute Time**, the report is executed the next time the Scheduler task for processing report runs, regardless of the frequency of the report.

- **Name** – the name of the report.
- **Created By** – the user who created the report.
- **Status** – the status of whether the report has been processed: "Need To Deliver", "Delivered", "Active", or "Processed".
- **Last Updated** – the date that the report was last updated.
- **Type** – report type.
- **Location, Partner, Product** – context at which report was created.
- **Process on Demand** – check check boxes to execute the reports selected.
- **Download** – clicking on one of the icons in this column allows for downloading of the report in that specific file format. Formats include: Excel, RTF, CSV, Pipe delimited, and PDF. This column will contain file icons only if the Create screen's "Download" option has been selected from the "Destination" drop-down.

Note: One or more of the columns described above may be hidden depending on your settings in Preferences - Layout - Lists - Reports.

Creating Reports - Templates

The **Reports - Template** screen allows you to view, create, and delete report type templates. These templates can be "plugged into" a report as they are created to save time. Each template and its selections can be saved to different versions of the same base report. This enables each trading relationship to have unique versions of each report based on their business requirements.

In the **Reports - Template** screen you can select an existing template from the drop-down list and view its attributes.

To view a template

1. Click **Reports - Template**.
2. Select an existing template from the **Name** drop-down list.
3. You can create templates by clicking **New**. Creating report templates is the same as creating actual reports, see [Creating Reports](#). The only difference is that a template is not bound to a specific context.

On Reports - Template - Create /Edit screens, the only validations performed are to check the duplicate selection of stream type and subtypes. Context related validations are not performed while creating the report template.

Common Report Settings

Each report is a combination of common and unique settings that you select and save. Each report type can have multiple saved settings that can be named and recalled for editing.

Common settings are described below. Unique settings are described in the procedures for creating the individual reports. Not all reports contain all of the common settings described below, though these settings do appear across multiple reports.

Common settings include:

General Settings

- Report Type – the report type drop-down allows you to choose which type of report to generate.
- Date Format – The **Date Format** lets you choose how dates are displayed in the report from a drop-down list. For example,
 - dd-mon
 - dd-mon-yy
 - dd/mm
 - dd/mm/yy
 - mm/dd
 - mm/dd/yy
 - mon-dd
 - yyyy-mm-dd
 - yyyy.mm.dd
 - yyyy/mm/dd
- Display Period Numbers – check box allows you to display period numbers.
- File Name – filename for the report.
- Number Format – determines how numerical data are displayed in the report from a drop-down list.

Note: If you select the number format, 123.456,789, do not use Microsoft Excel to view reports. Microsoft Excel's proprietary formatting may conflict with this number format and the data will not display as expected.

- Report Name – report title that will display in the report header.
- Decimal Places – maximum decimal places to be allowed in the report. Default is "2".
- Format – Select at least one of the following formats:
 - - Excel
 - - RTF
 - - PDF
 - - PIPE delimited (|), facilitates commas in description fields
 - - CSV (comma separated values)

Note: If the Scheduler and Server are running on different machines, and you want to use the E-mail, FTP, Extract, and Download features, you will need to make sure of the following: a. The directory and directory path (found in VCC Configurations as "Report Directory Path") exist on the Server as well as on the Scheduler machine. b. Once processing is completed, all report files are physically moved to the same directory (from Scheduler machine to Server machine).

- Language – language report will be generated in.
- Destination – a drop-down list allows you to select and save the report's destination type. Options are:
 - E-mail – Provide a valid e-mail addresses to which the report is sent as an e-mail attachment. A single e-mail address or multiple addresses can be entered.
 - FTP – Provide the full path to an FTP server directory (or IP address) and the appropriate ID and password.
 - Extract – Any user can select this option but users under "super_admin" role would be able to provide / override Directory Path. By default the Directory Path display the Path provided in "Report Directory Path" on Client tab in VCC Configuration. Super admin can override this path either by providing an Absolute path or Relative path (relative path should be relative to the "Synkra_Home/server/reportemp" directory) and only those reports that have the overridden path would be extracted to the overridden directory path, all other reports will be extracted to the directory path provided in the VCC Configuration.
 - Download – If the Destination is set to "Download", the user will be able to download reports from the "Download" column on the Reports - List screen. Multiple file formats can be generated for the same report.

To change the report's location from the default directory, use the standard OS syntax:

(current location), ..\<DIRECTORY_NAME>), (move one directory level up) etc. Reports reside on the machine where Scheduler is running.

Note: Reports will not be extracted if the directory path is incorrect.

Figure 7–2 Reports - Create "General" section

The screenshot shows a 'General' configuration section with the following fields and options:

- Report Type: Comment
- Template: None
- * File Name: [Empty text box]
- * Report Name: [Empty text box]
- * Format: Excel RTF CSV Pipe PDF
- Destination: E-mail
- * E-mail Addresses: [Empty text box]; delimited list
- Date Format: mm/dd/yy
- Display Period Numbers:
- Number Format: -123,456.78
- * Decimal Places: 2
- Language: American English

Context Detail Settings

Labels – Each report contains context elements. These are by default the Company, Local, Partner and Product names. However, what is displayed in the report can be

changed in the Context Details section by selecting a combination of names, IDs and URLs from the respective select boxes.

Each of the select boxes allow for multiple selections (Ctrl + click), but will default to "Name". Multiple selections will appear in the appropriate column of the report (Company, Local, Partner or Product columns) separated by a circumflex accent mark (^).

Figure 7–3 Reports - Create "Context Detail" section

Repeat Frequency

- Dates – dates during which the report will be generated. Start Date defaults to the current date, and End Date is optional. A specific time of day can be set, or the report can be run at "Any Time".
- Recurrence – determines the frequency at which the report is generated. The recurrence drop-down includes: Once, Always, Daily, Weekly, and Monthly. If you opt to "Always" run the report, you will not be able to specify a Start Time, since the report will run every time the corresponding scheduler job is run. A perpetually running report can be stopped by supplying an End Date at which it will expire, or by deleting the report from the List.
- Time – the time of day that you wish the report to run. This option does not appear when recurrence is set to "Always". The default setting, "Start Any Time", allows the extraction to occur as soon as the scheduler is run that day. Selecting the "Start At" radio button allows you to specify an exact time of day to run the report.

Note that reports will only be processed when the Scheduler runs.

Figure 7–4 Reports - Create "Repeat Frequency" section

Layout

- Page Size – paper size that the report will be printed on (letter, legal, ledger, banner, large, A4, A3).
- Orientation – printout orientation for the report (portrait, landscape).
- Hide / Show Columns – to display or not to display columns in the report.
- Sort Columns – the order in which the report displays "Visible" columns.
- Group Columns – columns to group in the report.

Figure 7-5 Reports - Create "Layout" section

Layout

Page Size: Orientation:

Hide Columns:

Visible:

- Creator
- Creator Folders
- Creator Company
- Partner
- Partner Folders

Hidden:

Multi-Column Sort Order: **Select:**

- Creator
- Creator Folders
- Creator Company
- Partner
- Partner Folders

Sort Column(s):

Group Columns: **Select:**

- Creator
- Creator Folders
- Creator Company
- Partner
- Partner Folders

Group:

For the following reports, "Multi-Column Sort Order" and "Group Columns" options are not available. For these reports, the column order is the implied sort and grouping order:

- Data Change
- Data Stream
- Exception Log
- Promotion Detail
- Promotion Item

Horizon

- Horizon – fixed or rolling start date, end date, or date span for the reporting period.
- Period Overlay – period overlay to apply to the report, if any.

Figure 7-6 Reports - Create "Horizon" section

Horizon

* Start:

* End:

Period Overlay:

Filter

The report type you select may contain no filter or several types of filters. Many report types have filters that are unique to the data they contain. Filters allow you to return precise report data. Checking a filter check box opens up additional fields in which you can specify creation dates, names, and status, etc.

Figure 7-7 Reports - Create "Filter" section

Filter

Creation Date Exception Status Exception Severity Name

Fixed Rolling Start: End:

Filters you will encounter include

- The Creation Date filter lets you specify a fixed or rolling start and end date that the data was created on.
- The Exception Status filter allows for the selection of specific statuses. These include
 - Active
 - Auto Dismissed
 - Auto Escalated
 - Auto In-Process
 - Auto Incomplete
 - Auto Resolved
 - Auto Unresolvable
 - Dismissed
 - Escalated
 - In-Process
 - Obsoleted
 - Resolved
 - Superseded
 - Unresolvable

You can multi-select Exception Statuses by Shift or Ctrl-clicking in the select box.

- The Exception Severity Filter allows you to generate a report displaying only those exceptions with the desired severity level (Low, Medium, or High). This is useful if you wish to create a report listing of all high severity exceptions. For more information about severity levels, see [Exception Severity Levels](#).
- The Name Filter allows you to filter by exception criteria name. You can type part of the name, the full criteria name, or any combination of characters that appear in the name. Your report will contain all viable matches for the criteria name, so it is best to be as specific as possible. (Entering the letter "t" will fetch all names that contain that letter.) The Name filter is not case sensitive.
- The Revision Status filter allows one or more revision statuses to be selected. Statuses include Accepted, Acknowledged, New, None, Rejected, and Superseded.
- Checking the Reason Code filter check box allows you to select for data that contains reason codes. If there is no reason code, that item will be excluded from the report.
- Checking the Comment filter check box allows you to select for data containing comments. Data lacking a comment will be excluded from the report.
- The Source filter can pull data from specific modules, as well as allowing you to select for the data origination source. Options include choosing whether the data was loaded or entered manually, in addition to selecting for Demand, Supply, Exceptions, and/or Metrics module data. Numbers in parenthesis () to the right of each option are the interger constant codes for the source.

- The Promo Status filter, which appears in the Promotions reports, allows you to filter by promotion status. To specify multiple statuses, use Ctrl or Shift-click. Statuses include
 - Active
 - Cancelled
 - Change Request
 - Completed
 - Expired
 - Modified
 - Modified Acknowledged
 - New, Planned
 - Proposed
 - Proposed Acknowledged
 - Rejected
 - Terminated
- The Data Type filter, which appears in the Promotions reports, allows you to filter your report by the type of data it will contain. To specify multiple data types, use Ctrl or Shift-click while selecting. Options include
 - Actual Lift
 - Actual Sales
 - Average Base Price
 - Average Promo Price
 - Base Sales Forecast
 - DC Order Forecast
 - DSD Order Forecast
 - Forward Buy Forecast
 - Monitor Sales
 - On Hand Inventory
 - Percent Sell
 - Planned Lift
 - Promo Sales Forecast

Note: When the Report has a Period Overlay, is at an Aggregate Context, or includes Data Stream Totals, the filter is in use even if the filter finds only one underlying individual data stream item. However, the reported quantity/count will treat the appropriate Period Overlay, Aggregate Context, or Data Stream Total as if every underlying data stream item qualified for the filter.

Streams

Stream selections vary depending on report type. Some reports will contain up to 10 stream selectors, while others have no streams.

Note that a selection of "both" for the Creator option will make the selection of "local" or "partner" invalid if all other components are the same.

Figure 7–8 Stream Selections Section

Streams	Type	Subtype	Creator	Compare
Stream 1:	Actual "Sales"	ActualSales:Base	Partner	<input type="checkbox"/>
Stream 2:	None	N/A	N/A	<input type="checkbox"/>
Stream 3:	None	N/A	N/A	<input type="checkbox"/>
Stream 4:	None	N/A	N/A	<input type="checkbox"/>
Stream 5:	None	N/A	N/A	<input type="checkbox"/>

Creating Reports

Access to this feature: superadmin and admin.

Many reports share common features and options that are described in Common Report Settings. Details on the following report types will focus solely on characteristics that are unique to each report.

Samples of each report type (generated PDF format) can be found in See [Sample PDF Report Screens](#).

Note: For the Promotion Detail and the Promotion Item Reports: the Total columns for Base Sales Forecast, Promo Sales Forecast, all three Order Forecasts, On hand Inventory and Monetray Sales will be displayed even if you have not selected these columns in the "Data Type" filter.

For Promotion Detail and Promotion Item reports: if the Event, Promotion and Promotion Items fields that are common to report outputs are hidden in the Module Config screen, the report will still be generated with these fields. Hidden fields are not supported for version 6.1.

Comment

The Comment report aggregates and displays all data stream comments. In addition to the common report settings, this report contains a Creation Date Filter and Stream settings.

To create a Comment report

1. Set your context.
2. Select Reports - Create.
3. Configure the General, Context Detail, Repeat Frequency, and Layout sections as described in Common Report Settings.
4. If you wish to Filter your report data by Creation Date, check the Creation Date check box and enter a fixed date, rolling period, or a combination of the two for Start and End.

5. Select up to ten Stream Type(s) and Subtype(s). Select whether the stream types are local or partner from the **Creator** drop-down lists.
6. Click **Save**. The created report appears in the **Reports - List** screen.

Figure 7–9 Streams Selection Sections

Filter			
<input checked="" type="checkbox"/> Creation Date	<input checked="" type="radio"/> Fixed <input type="radio"/> Rolling	Start: <input type="text"/>	End: <input type="text"/>
Streams			
	Type	Subtype	Creator
Stream 1:	Actual "Sales"	ActualSales:Base	Partner
Stream 2:	None	N/A	N/A
Stream 3:	None	N/A	N/A
Stream 4:	None	N/A	N/A
Stream 5:	None	N/A	N/A
Stream 6:	None	N/A	N/A
Stream 7:	None	N/A	N/A
Stream 8:	None	N/A	N/A
Stream 9:	None	N/A	N/A
Stream 10:	None	N/A	N/A

Note: At a folder-level context, Partner comments cannot be reported.

Data Change

To create a Data Change report

1. Set your context.
2. Select Reports - Create.
3. Configure the General, Context Detail, Context Detail, Repeat Frequency, Layout, and Horizon sections as described in Common Report Settings.
4. Select up to five **Stream Type(s)** and **Subtype(s)** from the drop-down lists. Select whether the stream types are local or partner from the **Creator** drop-down lists.

Figure 7–10 Streams Selection Sections

Streams				
	Type	Subtype	Creator	Compare
Stream 1:	Actual "Sales"	ActualSales:Base	Partner	<input type="checkbox"/>
Stream 2:	None	N/A	N/A	<input type="checkbox"/>
Stream 3:	None	N/A	N/A	<input type="checkbox"/>
Stream 4:	None	N/A	N/A	<input type="checkbox"/>
Stream 5:	None	N/A	N/A	<input type="checkbox"/>

5. Click the Compare check box to specify which comparison to show, if any. On a weekly database, you can select from None, Week Ago (prior period), or Year Ago (52 periods ago). On a Daily database, select from None, Yesterday (prior period), Week Ago (7 periods ago), or Year Ago (365 periods ago).
6. Click **Save**. The created report appears in the **Reports - List** screen.

Figure 7–11 Compare Section



Formula (applied to all five streams):

% Change Prior Period = $100 * ((\text{current period} - \text{prior period}) / \text{prior period})$

% Change Year Ago = $100 * ((\text{current period} - \text{year ago}) / \text{year ago})$

Data Stream

A Data Stream report contains no calculations other than summation; it extracts and formats multiple data streams for multiple contexts.

Note: If the specified horizon falls outside of the Period Overlay you select, the report will not be rejected, but will be reported at the period overlay.

If records processed in a report have duplicate UOM or Offset and either of these columns are set to be "Hidden", the Report's generation process will only consider one of the duplicate rows for the column that is set to be visible (i.e. Output will display one record for each Offset or UOM).

To create a Data Stream report

1. Set your context.
2. Select Reports - Create.
3. Configure the General, Context Detail, Repeat Frequency, Layout, Horizon, and Filter sections as described in Common Report Settings.

Figure 7–12 Filter and Stream Selections Sections

Filter

Creation Date

Revision Status

Accepted

Acknowledged

New

None

Rejected

Superseded

Streams

	Type	Subtype	Creator	UOM	Generation Offset	Year Ago
Stream 1:	Actual "Sales"	ActualSales:Base	Partner	Base Units	0	False
Stream 2:	None	N/A	N/A	Base Units	0	False
Stream 3:	None	N/A	N/A	Base Units	0	False
Stream 4:	None	N/A	N/A	Base Units	0	False
Stream 5:	None	N/A	N/A	Base Units	0	False
Stream 6:	None	N/A	N/A	Base Units	0	False
Stream 7:	None	N/A	N/A	Base Units	0	False
Stream 8:	None	N/A	N/A	Base Units	0	False
Stream 9:	None	N/A	N/A	Base Units	0	False
Stream 10:	None	N/A	N/A	Base Units	0	False

4. Select up to ten **Stream Type(s)** and **Subtype(s)** from the drop-down lists. Select whether the stream types are local or partner from the **Creator** drop-down lists. Select the UOM for each stream you have chosen. If you want to include a Generation Offset, enter a number in the text box. This field will automatically default to "0", indicating no offset. For more information on Generation Offset, refer to About Generation Offset. If you want to include Year Ago streams, that is, data streams containing year-ago data for the subtype, select "Yes" in the drop-down.

Note: When selecting a Filter for a Generation Offset stream, the Filter will only be applied if the latest revision of the Data Stream Item qualifies for the Filter.

Distributed Exception

The Distributed Exception report shows some or all existing system exceptions at and below a given context. View all exceptions or only exceptions with a certain status. Also, choose to see exceptions of all severities or only exceptions of a certain severity.

To create a Distributed Exception report

1. Set your context.
2. Select Reports - Create.
3. Configure the General, Context Detail, Repeat Frequency, Layout, and Horizon sections as described in Common Report Settings.
4. Select a Filter if you want to structure your report results based on Creation Date, Exception Status, Exception Severity, and/or Name. For more information on filters, see [Common Report Settings](#).

Figure 7–13 Filter Section

5. Click **Save** and the created report appears in the **Reports - List** screen.

Exception Log

The Exception Log counts exceptions under a given context and groups at the folder level that is one folder above the leaf level.

To create an Exception Log report

1. Set your context.
2. Select Reports - Create.
3. Configure the General, Context Detail, Repeat Frequency, Layout, and Horizon sections as described in Common Report Settings.
4. Select a Filter if you want to structure your report results based on Creation Date, Exception Status, or Exception Severity. For more information on Filters, see [Common Report Settings](#).
5. Click **Save** and the created report appears in the **Reports - List** screen.

Extract

The Extract report replaces the "Data Retrieval - Streams" type of data retrieval. The format is a flat, delimited file that is compatible with the Oracle Retail VCC Integrator for loading back into Xt. Delimiters include CSV (comma separated values), and pipe (|).

To create an Extract file

1. Set your context.
2. Select Reports - Create.
3. Configure the General, Context Detail, Repeat Frequency, Layout, and Horizon sections as described in [Common Report Settings](#).

Figure 7–14 Filter and Stream Selections Sections

Streams	Type	Subtype	Creator	UOM
Stream 1:	Actual "Sales"	ActualSales:Base	Partner	Base Units
Stream 2:	None	N/A	N/A	Base Units
Stream 3:	None	N/A	N/A	Base Units
Stream 4:	None	N/A	N/A	Base Units
Stream 5:	None	N/A	N/A	Base Units
Stream 6:	None	N/A	N/A	Base Units
Stream 7:	None	N/A	N/A	Base Units
Stream 8:	None	N/A	N/A	Base Units
Stream 9:	None	N/A	N/A	Base Units
Stream 10:	None	N/A	N/A	Base Units

4. Select a Filter if you want to structure your report file based on Creation Date, Revision Status, Reason Codes, Comments, or Source. For more information on Filters, see [Common Report Settings](#).
5. Select up to ten **Stream Type(s)** and **Subtype(s)** from the drop-down lists. Select whether the stream types are local or partner from the **Creator** drop-down lists. Choose the UOM from the drop-down for each stream type you select.

If any of the products do not have a Custom UOM defined, the Product is selected at Folder Level (Leaves Only), Custom UOM is selected for a stream, and report output displays Quantity as NULL, then either

Custom UOM is not defined for that Product

OR

Data stream base units value is NULL for that product.

6. Click **Save** and the created report appears in the **Reports - List** screen.

Last Transaction

The Last Transaction report tries to identify those products that should be purged based on sales activity. Note that the report output will display data for each leaf level context if the report is created at folder level.

To create a Last Transaction report

1. Set your context.
2. Select Reports - Create.
3. Configure the General, Context Detail, Repeat Frequency, Layout, and Horizon sections as described in Common Report Settings.
4. Click **Save** and the created report appears in the **Reports - List** screen.

No Transaction

The No Transaction report identifies products that never had any transactions for any data streams.

To create a No Transaction report

1. Set your context.

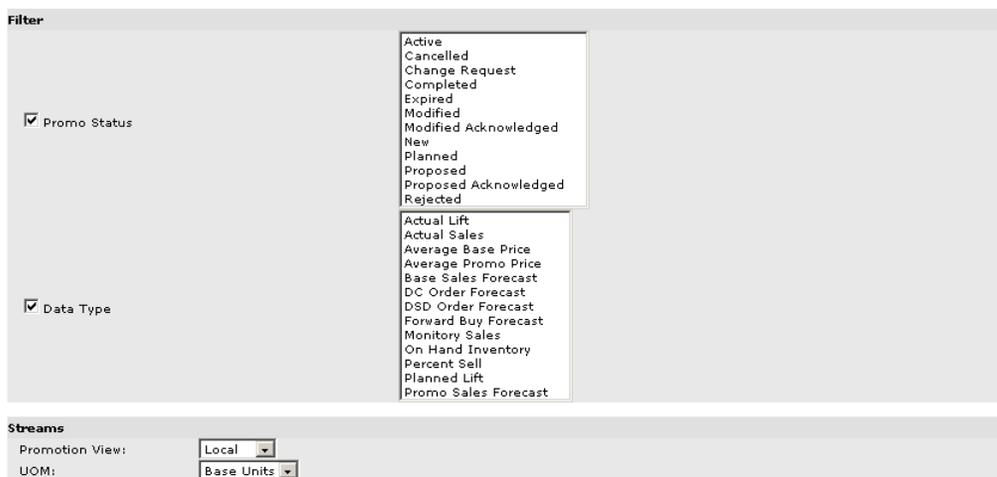
2. Select Reports - Create.
3. Configure the General, Context Detail, Repeat Frequency, Layout, and Horizon sections as described in Common Report Settings.
4. Click **Save** and the created report appears in the **Reports - List** screen.

Promotion Detail

To create a Promotion Detail report

1. Set your context.
2. Select Reports - Create.
3. Configure the General, Context Detail, Repeat Frequency, Horizon, and Filter sections as described in Common Report Settings.

Figure 7–15 Filter and Streams Selections Section



4. Select whether the Promotion View should be "Local" or "Partner" from the drop-down.
5. In the UOM drop-down, select which unit of measure the report should use to display data.
6. Click **Save** and the created report appears in the **Reports - List** screen.

Promotion Details Formula:

$$\text{Planned Lift} = \text{Promo POS FC} / \text{Base POS FC}$$

$$\text{Actual Lift} = (\text{Actual POS} - \text{Base POS FC}) / \text{Base POS FC}$$

$$\% \text{ Sell} = \text{Actual Total POS} / (\text{Base POS FC} + \text{Promo POS FC}) * 100$$

Promotion Item

To create a Promotion Item report

1. Set your context.
2. Select Reports - Create.

3. Configure the General, Context Detail, Repeat Frequency, Layout, Horizon, and Filter sections as described in Common Report Settings.
4. Select whether the Promotion View should be "Local" or "Partner" from the drop-down.
5. In the UOM drop-down, select which unit of measure the report should use to display data.
6. Click **Save** and the created report appears in the **Reports - List** screen.

Promotion Item Report Formula:

Planned Lift = Promo POS FC / Base POS FC

Actual Lift = (Actual POS - Base POS FC) / Base POS FC

% Sell = Actual Total POS / (Base POS FC + Promo POS FC) * 100

Generating Reports

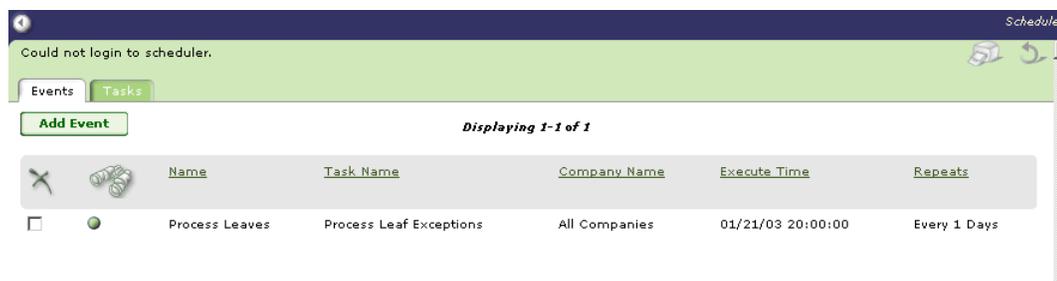
After creating a report, you must process the reports in order to send them. "Send Reports" needs to be run using the Scheduler.

Check the "Process on Demand" check box on the Reports - List screen, and click the "Process Selected Items" button. Next, schedule the "Run Report" task to generate the reports in the Scheduler. Click "Send Reports" to send the reports to the addresses entered for the report, and "Run and Send Report" to generate and send the report through the Scheduler.

To schedule the "Report Usage" task

1. Select **Scheduler - Events**.
2. When the **Scheduler - Events** screen appears, click the Add Event button.

Figure 7-16 Scheduler - Events Screen



3. In the **Scheduler - Add Event** screen enter a name for the event.

Figure 7–17 Add Event Screen

4. Select "Run Reports", "Send Reports", "Run and Send Reports" from the **Task** drop-down list.
 - "Run Reports" processes the reports and displays the HTML through the UI only.
 - "Send Reports" distributes/sends the reports to the destination selected (e.g., e-mail, FTP, and/or extraction).
 - "Run and Send Reports" processes and sends reports simultaneously and displays the HTML through the UI.
5. Enter the date and time for the task to begin running in the **Execute Time** text box. Use the format: mm/dd/yy hh/mm/ss.
6. To repeat the report generation task, check the **Repeats** check box. Enter the frequency that the task is to be repeated in the **Repeats Every** text box and select a time period from the drop-down list. For example, Repeats Every 2 Weeks.
7. Click **Create**.
8. The new event appears in the **Scheduler - Events** screen.

Deleting a Report

To delete a report from the **List** screen

1. Select the "Delete" check box next to the report to be deleted.

Note: Click the Delete icon to select/deselect all items on the current page to be deleted.

2. Click **Apply Changes**.

Deleting a Template

To delete a template from the **Template** screen

1. Select a template from the drop-down list.
2. Click **Delete**.

This chapter includes the following topics:

- [Introduction.](#)
- [Viewing and Editing Metrics](#)
- [Creating Metrics](#)
- [Processing Metrics](#)
- [Metric Types.](#)
- [Access Control](#)
- [Deleting Metrics](#)

Introduction

The Metrics module provides a way to configure and calculate business metrics by performing mathematical operations on existing data streams. The computed results are then stored as a separate data stream.

Viewing and Editing Metrics

The Metrics module has three main screens: List, View/Edit Details, Copy, and Create. The List view is used to view and manage the most important details of each metric. View/Edit is used to edit the specific details of existing metrics. Copy is used to duplicate an existing metric. Create is used to build new metrics.

The list view displays all Metrics that are defined relative to the currently selected context. You can select between "at-and-below" and "at-and-above" the current context in the Context Chooser's Display Mode tab.

The Display Mode tab also contains a Search option, which allows you to search by any of the following criteria:

- Local
- Partner
- Product
- Metric Name
- Metric Type

The list view contains the following data and available actions:

- Delete – Deletes any selected Metrics.

- Override Execute Time – Resets the execution time of any selected Metrics.
- Process on Demand – Processes any selected Metrics.
- View/Edit – Displays a detailed view of the selected Metric.
- Local – The local location for the Metric.
- Partner – The partner location for the Metric.
- Product – A description of the product.
- Metric Type – The type of Metric selected, such as Ratio, Forecast Error, etc.
- Metric Name – User-entered name of the Metric.
- Processing Order – The order (numbers 1-5) assigned for processing. Processing begins with "Processing Order 1" metrics and is completed for all metrics at this level before beginning "Processing Order 2." Processing continues in a stepwise fashion until all metrics have been calculated. This is useful if you want to use the output of one metric as the input for another.
- Last Updated By – The name of the last user who updated the Metric.
- Last Updated – The date and time the metric definition was last updated.
- Last Run – The date and time the metric was last calculated.
- Last Run By – The name of the last user to run processing.
- Status – Status of metric. Status includes both "Active" and "Processed" metrics. When a metric is created, it is assigned an "Active" status. After job processing is completed, status will change to "Processed."
- Sum – If your context contains a folder that you choose to aggregate on, all the leaves under the selected folder will be summed. On the list screen this column can be blank, or will contain either Local, Partner, Product, or a combination of the three.
- Copy – Copy an existing metric. This will take you to a screen duplicating the original metric's settings, where you can name the metric, change the context, make adjustments or save it as is.

Note: One or more of the columns described above may be hidden depending on your settings in Preferences - Layout - Lists - Metrics.

Figure 8-1 Metrics - List - Detail View

Context: Display Mode

Local: Nabisco at Pisquatuck
 Partner: Speedy Rx at Boston
 Product: Planters

Product: [Dropdown] Name GIN LIN Folder [Checked] [Input]

List Create

Displaying 1-2 of 2

Local	Partner	Product	Metric Type	Metric Name	Processing Order	Last Updated By	Last Updated	Process On Demand	Last Run By	Last Run	Status	Sum	Copy
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters Average	Average1	3	Dave Wilson	09/26/03 15:55:00	<input type="checkbox"/>	<input type="checkbox"/>		Active	Product	
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters Average	Average2	3	Dave Wilson	09/26/03 15:58:53	<input type="checkbox"/>	<input type="checkbox"/>		Active	Product	

The Metrics - List - Detail View is used to view and edit the details of each metric.

Note: Metrics - List may contain collaborations that no longer exist. Attempting to access a collaboration that has been removed will result in an "Invalid context" error. To avoid this problem, click the "Set" button after changing your context.

The Detail View allows you to configure the following:

- Metric Name – User-defined name for each metric. The name does not have to be unique.
- Metric Type – Displays a list of available metric types. Some metric types (Simple Math operations, Ratio, Growth, Variability, Weighted Average Forecast Error, Forecast Error, Rolling Error, and Count Missing) require you to choose between a Percent formula or an Absolute formula. If you select one of these metric types, radio buttons will appear after the drop-down.
- Aggregate On – This option will show "None" unless a folder level Metric is being viewed. For any dimension that is un-checked, the metric will be calculated each leaf under the selected folder. For any dimension that is checked, if the "levels below" that dimension is left blank, the metric will be calculated at the selected folder. If the "levels below" control is used, the metric will be calculated at every folder that is the indicated number of levels below the current context in that dimension.
- Treat Null Value as Zero – Check box that allows null values to be treated as zeros.
- Processing Order – The order (numbers 1-5) assigned for processing. Processing begins with "Processing Order 1" metrics and is completed for all metrics at this level before beginning "Processing Order 2", and processing continues in a stepwise fashion until all metrics have been calculated. When using "Process on Demand", the same order also applies. This is useful if you want to use the output of one metric as the input for another.
- Period Overlay – Allows you to select from a list of available company specific fixed period overlays.

- Periods – Select from fixed or rolling periods and enter the Start and End dates or number of periods. When selecting rolling periods, entering a "0" indicates the current period. Use negative numbers for past periods and positive numbers for future periods.
- The Repeat Frequency section configures how often the calculation will be repeated. The default will be today's Start Date, with a recurrence of "once", which means that the calculation will not repeat. If you wish the calculation to repeat, change the Recurrence drop-down to the desired frequency. Other options include: always, daily, weekly, and monthly.
- Streams – Configure the input and output streams and options for each metric. The options available depend on the Metric Type selected.

To Edit or View Metrics Details

1. Select a context.
2. Select Metrics - List. The List screen appears.
3. Click the appropriate colored dot under the binoculars icon to View/Edit pre-existing metrics. The View/Edit screen appears.

Figure 8–2 View/Edit Screen

The screenshot shows the 'View/Edit Metric' screen. At the top, there are 'List' and 'Create' tabs. The main form is divided into several sections:

- Metric Name:** Dave's Metric
- Metric Type:** Simple Math
- Operation Type:** Sum
- Aggregate On:** Product
- Treat Null Value as Zero:**
- Processing Order:** 3
- Period Overlay:** None
- Periods:** Fixed Rolling
- * Start:** 0 *** End:** 1

Repeat frequency

- Dates:** * Start Date: 09/29/03 (mm/dd/yy) Time: (HH:mm) Any Time End Date: (mm/dd/yy)
- Recurrence:** Once

Streams

	Type:	Accumulation Rule:	Subtype:	Creator:
Stream1:	Actual "Sales"	Movement	ActualSales:Base	Partner
Stream2:	None		None	None
Stream3:	None		None	None
Stream4:	None		None	None
Stream5:	None		None	None
Stream6:	None		None	None
Stream7:	None		None	None
Stream8:	None		None	None
Stream9:	None		None	None
Stream10:	None		None	None
Output Stream:	DC Receipts	Movement	DC Receipts	Local

At the bottom, there are 'Save' and 'Cancel' buttons.

4. After you have made your changes, click Save to save and return to the Metric - List screen, or Cancel to return to the list without saving.

Note: Data derived from Metrics calculations can be displayed in Data - View/Edit with a highlight color. To select for this option, see the Preferences - Layout - Table/Graph - Highlight Source screen.

Creating Metrics

To create new metrics

1. Select a context.
2. Select Metrics - Create. The Create screen appears.

Figure 8-3 Create Screen

The screenshot shows the 'Create' screen for a metric. At the top, there are 'List' and 'Create' tabs. The main form is divided into several sections:

- Metric Name:** A text input field.
- Metric Type:** A dropdown menu set to 'Exception Count'.
- Aggregate On:** A checkbox for 'Product'.
- Treat Null Value as Zero:** A checkbox.
- Processing Order:** A dropdown menu set to '3'.
- Period Overlay:** A dropdown menu set to 'None'.
- Periods:** Radio buttons for 'Fixed' and 'Rolling' (selected). Below are input fields for '* Start: 0' and '* End: 1'.
- Repeat frequency:**
 - Dates:** '* Start Date: 09/29/03' (mm/dd/yy), 'Time: (HH:mm)', 'Any Time' (selected), and 'End Date: (mm/dd/yy)'.
 - Recurrence:** A dropdown menu set to 'Once'.
- Output Stream:**
 - Type:** A dropdown menu set to 'DC Receipts'.
 - Accumulation Rule:** A dropdown menu set to 'Movement'.
 - Subtype:** A dropdown menu set to 'DC Receipts'.
 - Creator:** A dropdown menu set to 'Local'.
- Exception Status:** A dropdown menu with options: Active, In Process, Auto In Process, Superceding, Escalated. The 'Active' option is selected.

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

3. Enter the Metric Name. This does not have to be a unique name.
4. Select the Metric Type you would like to use, and if available, whether you wish it to be a percentage or an absolute formula.
5. If you have selected a context that contains folders, you will be offered the option to Aggregate on the folder level(s). Otherwise, for leaf-level contexts, "None" will be displayed.
6. Select the Processing Order you wish to assign the metric. Highest priority processing can be set to one. Five levels of processing are provided, with five being the lowest priority, and three being the default.
7. If you have chosen a Metric Type that contains period overlays, you can select an overlay from the View by Overlay drop-down. When you select an overlay, a check box, "Set Period Range," allows you to specify a fixed or rolling set of periods for your overlay to Begin and End on. Whole period overlays will be used if "Set Period Range" is not checked. When a Begin and End Date are specified, only the intersecting periods will be used. Oracle Retail VCC will default to Base Periods whether or not you have period overlays.
8. Determine whether the metric will occur during a fixed or rolling Period. If the metric should occur during a specific time frame, select the Fixed radio button and enter the "Start" and, optionally, the "End" date. If you want the metric period to more forward relative to the "Start" period specified, select the Rolling radio button, and enter the "Start" and "End" periods. Entering "0" indicates the current period.

9. The Repeat Frequency section configures how often the calculation will be repeated. The default will be today's Start Date, with a recurrence of "once", which means that the calculation will not repeat. If you wish it to repeat, change the Recurrence drop-down to the desired frequency. Other options include: always, daily, weekly, and monthly.
10. Select the Type, Subtype, and (optionally) Creator from the available streams. Your options in this portion of the screen will vary depending on which metric type and streams you have selected.
11. Click Save to create the Metric, or Cancel to return to the Metric - List screen without saving.

Deleting Metrics

To delete a metric

1. Select a context.
2. Select Metrics - List. The List screen appears.

Figure 8-4 List Screen

		Local	Partner	Product	Metric Type	Metric Name	Processing Order	Last Updated By	Last Updated	Process On Demand	Last Run By	Last Run	Status	Sum	Copy
<input checked="" type="checkbox"/>		Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	Average	Average1	3	Dave Wilson	09/26/03 15:55:00	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Active	Product	
<input checked="" type="checkbox"/>		Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	Average	Average2	3	Dave Wilson	09/26/03 15:58:53	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Active	Product	
<input type="checkbox"/>		Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	Exception Count	Dave's Metric	3	Dave Wilson	09/29/03 10:39:15	<input type="checkbox"/>	<input type="checkbox"/>		Active	None	

3. Select the individual check boxes under the Delete icon. Or click the Delete icon to select all metrics for deletion.
4. Click Process Selected Items.

Processing Metrics

Metrics can be "processed on demand," much like Exceptions.

To process Metrics on demand

1. Select a context.
2. Select Metrics - List. The List screen appears.
3. Click the check boxes under the "Process on Demand" column to select the Metrics you wish to process.

Figure 8-5 List Screen

The screenshot shows a web interface with a green header bar containing 'List' and 'Create' buttons. Below the header is a section titled 'Process Selected Items' with a sub-header 'Displaying 1-3 of 3'. The main content is a table with columns: Local, Partner, Product, Metric Type, Metric Name, Processing Order, Last Updated By, Last Updated, Process On Demand, Last Run By, Last Run, Status, Sum, and Copy. Three rows of data are visible, each with a checkbox in the 'Local' column.

Local	Partner	Product	Metric Type	Metric Name	Processing Order	Last Updated By	Last Updated	Process On Demand	Last Run By	Last Run	Status	Sum	Copy
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	Average	Average1	3 Dave Wilson	09/26/03 15:55:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Active	Product	
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	Average	Average2	3 Dave Wilson	09/26/03 15:58:53	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Active	Product	
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	Exception Count	Dave's Metric	3 Dave Wilson	09/29/03 10:39:15	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Active	None	

- Click Process Selected Items.
- You may then view the Monitor screen if you wish to check the progress of your job. In the "Job Name" column, you will see an entry called "Process Metrics On Demand", which indicates that your job has begun processing.

Figure 8-6 Jobs Screen

The screenshot shows the 'Monitor' interface with a green header bar containing 'Jobs', 'Usage', 'Current Connections', and 'Server Locks' tabs. Below the header is a search bar with 'None' selected and a 'Mark entries before' dropdown set to '09/29/03'. The main content is a table with columns: User Name, Company, Job ID, Job Name, Start Time, End Time, and Status. The 'Job Name' column contains the entry 'Process Metrics On Demand', which is circled in red.

User Name	Company	Job ID	Job Name	Start Time	End Time	Status
<input type="checkbox"/>	Dave Wilson	Nabisco	183	Process Metrics On Demand	09/29/03 11:49:51	Active
<input type="checkbox"/>	superuser	Nabisco	182	Extract Users	09/29/03 11:44:49	Completed
<input type="checkbox"/>	Dave Wilson	Nabisco	164	Creating Aggregates	09/19/03 14:10:40	Completed
<input type="checkbox"/>	Dave Wilson	Nabisco	163	Process Reports On Demand	09/18/03 17:08:20	Completed
<input type="checkbox"/>	Dave Wilson	Nabisco	162	Creating Aggregates	09/17/03 17:56:15	Completed
<input type="checkbox"/>	superuser	Nabisco	148	Process Aggregate Actions	09/12/03 14:36:48	Completed
<input type="checkbox"/>	integratoruser	Nabisco	147	Extract Users	09/12/03 14:36:33	Completed
<input type="checkbox"/>	integratoruser	Nabisco	146	Extract Supply Blocked Dates	09/12/03 14:36:18	Aborted
<input type="checkbox"/>	superuser	Nabisco	145	Complete Criteria Creation	09/12/03 14:36:00	Completed
<input type="checkbox"/>	superuser	Nabisco	144	Process Exception Alerts	09/12/03 14:34:47	Completed
<input type="checkbox"/>	integratoruser	Nabisco	143	Extract Supply Blocked Dates	09/12/03 14:34:21	Aborted
<input type="checkbox"/>	superuser	All Companies	142	Process Leaf Exceptions	09/12/03 14:25:51	Completed
<input type="checkbox"/>	superuser	Buyer Local Company	125	Modify Collaborations	09/11/03 10:13:50	Completed
<input type="checkbox"/>	superuser	All Companies	124	Creating Aggregates	09/11/03 10:08:36	Completed
<input type="checkbox"/>	superuser	All Companies	123	Creating Aggregates	09/11/03 10:00:14	Could not obtain lock
<input type="checkbox"/>	superuser	All Companies	122	Creating Aggregates	09/11/03 09:59:12	Completed
<input type="checkbox"/>	superuser	All Companies	121	Process Leaf Exceptions	01/20/03 20:12:21	Completed
<input type="checkbox"/>	superuser	All Companies	116	Process Leaf Exceptions	01/09/03 20:00:00	Completed
<input type="checkbox"/>	superuser	All Companies	115	Process Leaf Exceptions	01/08/03 20:00:00	Completed
<input type="checkbox"/>	superuser	All Companies	114	Process Leaf Exceptions	01/08/03 18:25:19	Completed

- You can click on the Job ID link in the Monitor - Jobs tab to view a detailed log containing the Name, Start and End Time, number of Data Stream Items, Processed and Rejected counts, and Status. If the metric has an output stream that needs to be disaggregated, you may view disaggregation-related messages in case of failure.

Batch Processing

Although Metrics can be scheduled for processing at any desired frequency, each Metric will only process if the specified period has elapsed since the last processing.

If a scheduler job is set to process the metrics, but a metric's repeat frequency specifies processing on a less frequent schedule (once monthly, or weekly, for instance), the scheduled event will pass over this job until the time elapsed coincides with the repeat frequency.

Checking the "Override Execute Time" check box under the clock icon on the Metrics - List screen will cause the selected Metrics to be processed during the next scheduled cycle, regardless of when they were last processed.

Metrics Error Messages

The following table describes the messages you may encounter upon processing Metrics.

Table 8-1 Metrics Error Messages

Error Message	Description
Completed Successfully.	Processing completed successfully. Please check output and the number of items processed.
Output stream not editable by Local Company.	The Output stream type code defined for the metric should be editable by the metric creator company.
Output stream should be a measure stream.	The Output stream type code defined for the metric should be a Measure Stream.
Disaggregation failed for some contexts. Please check the reject details for more information.	Disaggregation failed while trying to disaggregate the output. The reject log will have the disaggregation error message for each of the failed contexts.
Dates do not fall within Period Overlay.	The Begin - End Dates used in the metric are outside of the period overlay. No period overlay items were found within the range specified.
Periods out of range. Please check to see if Current, Begin and End dates are defined in the system.	Current Date may not correspond to any period in the system, or no periods are defined in the system for the Range specified.

Metric Types

The Metrics module allows for the calculation of fourteen fixed business metrics. Some of the metrics are available at leaf-level and folder-level contexts, and some only at folder-level, as shown below. In addition, some metrics can be calculated according to period overlays.

Metric Output

The output of a metric calculation is written to the chosen output stream, which is editable by the company creating the metric. The output will be either at leaf level or at the aggregate level based on the "sum on" option chosen at the time of metric creation as well as the Period option.

If any of the four dimensions (Creator Location, Partner Location, Product, Period) are at a folder level, the output will be written at an aggregate level (for Measure Stream output only).

If a fixed period overlay which has folder period items is used, then the output will be written at folder periods. This applies to all but Balance streams.

Period Overlays with Period Offsets

When Period Overlays have "Period Offsets," the offset refers to the overlay periods, not the base periods. For instance, if you set up a monthly overlay, and specify an offset of "1", then the comparison is "this month to last month".

Table 8–2 Metrics that Calculate on the Basis of Period Overlays

Metric	Description	No. of Input Streams	Available		
			Leaf	Folder	Percent
Average	Averages a single data stream for all leaf values under a selected context.	1			
Count Missing	Counts leaves with missing values	1		✓	✓
Exception Count	Count of exceptions at or below a context	0	✓		
Forecast Error/Accuracy	Forecast error or accuracy between forecast and actual streams.	2	✓	✓	✓
Growth	Difference of B to A, either absolute or percent	1	✓	✓	✓
Inventory Turns/Average Periods Of Supply	Ratio of Annualized Consumption to Inventory. (Consumption is the average across a user-defined range.)	2	✓	✓	
Period to Date	For each base period, the result is the sum of that base period, plus all prior base periods in the overlay period. The sum resets with each overlay period.	1	✓	✓	
Periods of Supply	Number of periods of consumption that the given inventory call Supply.	2	✓	✓	
Perpetual Inventory	The current balance of inventory is maintained daily by adding to the inventory account when goods are received and deducting when they are used.	3	✓	✓	
Rolling Error	MAD of the error over a rolling horizon	2	✓	✓	✓
Simple Math – Sum (+)	Simple math operation types consisting of: sum, ratio, product, and difference.	1	✓		
Simple Math – Ratio (/)	Simple math operation types consisting of: sum, ratio, product, and difference.	2	✓	✓	✓
Simple Math – Product (*)	Simple math operation types consisting of: sum, ratio, product, and difference.	2	✓	✓	
Simple Math – Difference (-)	Simple math operation types consisting of: sum, ratio, product, and difference.	2	✓	✓	
Time Average	Average of a single data stream over a rolling horizon.	1	✓	✓	

Table 8–2 (Cont.) Metrics that Calculate on the Basis of Period Overlays

Metric	Description	No. of Input Streams	Available		
			Leaf	Folder	Percent
Variability	MAD or PMAD of a stream over a rolling horizon.	1	✓	✓	✓
Weighted Average Forecast Error	Weighted average forecast error or accuracy aggregated for all items under a folder.	2		✓	✓

Average

This Metric calculates the average of a single data stream for all leaf values under the selected context, on a period-by-period basis.

If the output stream selected is not a measure stream, a Disaggregation Profile must first be in place for the appropriate context, stream type and period range of the metric.

Table 8–3 Average Metric

Item	Details
Formula	Average of streams for all contexts under folder.
Input	Any
Output	Any streams. If not Measure, an aggregate context will need a disaggregate profile in order to disaggregate.
Leaf	No
Sum	Yes
Overlay	No
Treat Null As Zero Option	Null values will be treated as "0".

Count Missing

This counts all leaves contained in the specified folder that have no value.

Table 8–4 Count Missing

Item	Details
Formula	Result = count (all leaves)- count(all leaves with a value)
% Formula	Result = 100* [count (all leaves)- count(all leaves with a value)]/count(all leaves)
Input Streams	Any one stream
Output Stream	Any stream
Additional Items	N/a
Available at leaf	Yes

Table 8–4 (Cont.) Count Missing

Available at sum	Yes
Available at overlay	No
Null / Zero handling	N/a

Exception Count

This provides a count of exceptions that match selected statuses at and below the selected context.

Table 8–5 Exception Count

Item	Details
Formula	Result = count (exceptions that match a status)
% Formula	n/a
Input Streams	n/a
Output Stream	Any stream
Additional Items	Status selection check boxes: select one or more status from all available exception statuses.
Available at leaf	Yes
Available at sum	No.
Available at overlay	No
Null / Zero handling	N/a

Forecast Error/Accuracy

This Metric calculates forecast error for single periods, either on an absolute or a percentage basis, with forecast accuracy in percentage points.

Table 8–6 Forecast Error

Item	Details
Error Formula	Result = Forecast - Actual If "Absolute Value" is checked, the output will be in positive units.
% Error Formula	Result = 100 * (Forecast - Actual) / Divisor stream (User has the option of picking either Actual Stream or Forecast Stream as the Divisor Stream.) If "Absolute Value" is checked, the output will be in positive units.
% Accuracy Formula	Result = 100 - ABS(% Error)
Input Streams	Any two streams
Output Stream	Any measure stream
Additional Item	Generational offset = # of generations back to take the forecast value. Text entry, restricted to integers ≥ 0 , default = 0 (i.e., current stream).
Absolute Value	Can be used to create output datastream items with an absolute value of the forecast error formula. Not available with Accuracy.
Available at leaf	Yes

Table 8–6 (Cont.) Forecast Error

Item	Details
Available at sum	Yes
Available at overlay	No.
Treat Null as Zero Option	Null values will be treated as "0".

Growth

This metric calculates the growth from one value to another, either based on a period offset, or a generational offset.

Table 8–7 Growth Metric

Item	Details
Formula	Result = (A2 - A1) A2 is the value of the current generation of stream A. A1 is the value of stream A, either the current generation offset by the specified number of periods back, or the value of stream A at the current period, offset by the specified number of generation back. The result goes into the period of A2.
% Formula	Result = 100 * (A2 - A1) / A1
Input Streams	Any one stream.
Output Stream	Any measure stream.
Offset Type	Select field - either Period or Generation
Offset Qty	Text entry box, integer >0, default=1
Available at leaf	Yes
Available at sum	Yes. The inputs are the aggregate values.
Available at overlay	Yes.
Treat Null as Zero Option	If value is null, it will be treated as "0".

Inventory Turns

The term "Inventory Turns" refers to the number of times per year than inventory is "turned over". For example, if your average inventory was worth \$100, and your annual sales were \$600, then you had $\$600/\$100 = 6$ "turns". Likewise, if you had average inventory in a particular month of \$100, and your sales for that month were \$50, your annualized rate of sales for that month was $\$50*12 = \600 , so again your turns are 6. The key concept is that consumption is always adjusted to an annualized basis. So for daily data, the consumption for a period is multiplied by 365, for weekly data, the consumption is multiplied by 52, and so on.

Table 8–8 Inventory Turns

Item	Details
Formula	Result = Average Consumption (annualized) / Inventory (same bucket)
% Formula	n/a
Input Streams	Consumption = any movement stream Inventory = any balance stream

Table 8–8 (Cont.) Inventory Turns

Item	Details
Output Stream	Any measure stream
Available at leaf	Yes.
Available at sum	Yes. The input values are the aggregates.
Report in Overlay	The inventory input is the average of each overlay period. Nulls should be ignored in the average (i.e., if inventory is only reported for one period in the overlay, Xt will use that value, and will not divide by the number of base periods in the overlay period).
Available at overlay	Yes. The input for consumption is the overlay value. The input for inventory is the average of each overlay period.
Treat Null as Zero Option	If value is null, it will be treated as "0".

Average Periods Of Supply

The "Average Periods Supply" metric is a measure of how long the current inventory would last at the periodic consumption rate.

Example: If 4 were the # of periods specified, your past period consumption was 100, 160, 180, 120, and your current inventory is 168; your periods of supply would be 1.27 periods for the current period. This is similar to the "Periods Back" safety stock calculation in the Supply module.

Table 8–9 Average Periods of Supply

Item	Details
Formula	Result = Inventory / Average Consumption
% Formula	n/a
Input Streams	Inventory = any balance stream Consumption = any movement stream
Output Stream	Any measure stream
Additional Item	Text entry - # of periods to average. Use a negative integer for periods back and positive integer for periods forward.
Available at leaf	Yes
Available at sum	Yes. The input values are the aggregates.
Available at overlay	Yes. The input for consumption is the overlay value, the input for inventory is the average of each overlay period.
Null / Zero handling	If inventory = null, treat as zero. If consumption = null or zero, result = zero.

Period to Date

The Period to Date metric calculates that for each base period, the result is the sum of that base period plus all prior base periods in the overlay period.

Table 8–10 Period to Date Metric

Item	Details
Formula	For each base period, the result is the sum of that base period plus all prior base periods in the overlay period.

Table 8–10 (Cont.) Period to Date Metric

Item	Details
% Formula	N/A
Input Streams	Any one stream.
Output Stream	Any balance stream
Available at leaf	Yes
Available at sum	Yes. The input values are the aggregates.
Available at overlay	A fixed overlay must be specified, but the results are written to base periods.
Null / Zero handling	Nulls are always treated as zero.

Periods of Supply

The "Periods of Supply" metric is a measure of how long the current inventory will last given the current consumption forecast. Example: Your forecast consumption for the next four periods is: 100, 160, 180, 120, and your current inventory is 332. The first two periods consume a total of 260, leaving 70 units available for the third period. This covers $70/180 = 0.4$ of the third period. So your "periods of supply" is 2.4. This is similar to the "Periods Forward" safety stock calculation in the Supply module.

Table 8–11 Periods of Supply

Item	Details
Formula	$R = n + \frac{I - \sum_{x=1}^n C_x}{C_{x=1}}$ <p>such that: $\sum_{x=1}^n C_x$ I $\sum_{x=1}^n C_x$</p> <p>where: C_x = Consumption at period x I = current inventory R = Result</p>
% Formula	n/a
Input Streams	Inventory = any balance stream Consumption = any movement stream
Output Stream	Any measure stream
Available at leaf	Yes
Available at sum	Yes. The input values are the aggregates.
Available at overlay	Yes
Report in Overlay	The inventory input is the average of each overlay period. Nulls should be ignored in the average (i.e., if inventory is only reported for one period in the overlay, Xt will use that value, and will not divide by the number of base periods in the overlay period).
Null / Zero Handling	If Inventory = null, result = zero. If Cx = null, treat Cx as a zero.

Perpetual Inventory

The current balance of inventory is maintained daily by adding to the inventory account when goods are received and deducting when they are used. The Perpetual

Inventory metric allows for a company to have more timely and accurate data on inventories, as opposed to only reporting inventory when it is actually counted.

Table 8–12 Perpetual Inventory Metric

Item	Details
Formula	If the prior period has a value in actual inventory, then calculated inventory this period = actual inventory last period - consumption this period + receipts this period. If actual inventory is null for the prior period, then calculated inventory for this period = calculated inventory for the prior period - consumption for this period + receipts for this period. If calculated inventory for the prior period is null, treat as zero.
% Formula	N/A
Input Streams	Actual Inventory – Any one balance stream – Nulls treated as nulls. Consumption – Any one movement stream – Nulls treated as zeros. Receipts – Any one movement stream – Nulls treated as zeros.
Output Stream	Any one balance stream.
Available at leaf	Yes
Available at Overlay	N/A
Available at sum	Yes. Input values are the sum of the leaves.
Null / Zero handling	If inventory = null, treat as zero. If consumption = null or zero, result = zero.

Note: It is possible that the calculated inventory may not match the actual inventory.

Rolling Error

This metric calculates forecast error over a user-defined rolling horizon, using the MAD (Mean Absolute Deviation) or PMAD (Percent MAD) method.

Table 8–13 Rolling Error

Item	Details
Error Formula	$R = \frac{1}{n} \sum_{x=1}^n F_x - \bar{A} $ <p>where: R = result F_x = Forecast at period x A_x = Actual at period x</p>
% Error Formula	$R = 100 \frac{1}{n\bar{A}} \sum_{x=1}^n F_x - \bar{A} $ <p>where: \bar{A} = Average of Datastream A</p>

Table 8–13 (Cont.) Rolling Error

Item	Details
% Accuracy Formula	Result = 100 - % Error
Input Streams	Any two streams
Output Stream	Any measure stream
Generational Offset	# of generations back to take the forecast value. Text entry, restricted to integers ≥ 0 , default = 0 (i.e., current stream).
Rolling Horizon	N in above formula.
Available at leaf	Yes
Available at sum	Yes
Available at overlay	Yes. If an overlay, then the horizon (number of periods to average) is automatically set to the number of periods in each period overlay item.
Treat Null as Zero Option	If value is null, it will be treated as "0".

Simple Math

The Simple Math metric is a collection of the four simple mathematical operators:

- [Sum \(+\)](#)
- [Ratio \(/\)](#)
- [Product \(*\)](#)
- [Difference \(-\)](#)

Difference

The Difference Metric finds the difference between two streams.

Table 8–14 Difference Metric

Item	Details
Formula	Result = A - B
Percent Formula	N/A
Input Streams	Any two stream(s). Streams should use same accumulation rule.
Output Stream	Any stream. Must use same accumulation rule as Input Stream.
Offset Type	N/A
Offset Quantity	N/A
Available at leaf	Yes
Available at sum	Yes. The inputs are the aggregate values.
Available at overlay	Yes. The inputs are the overlay values.
Treat Null as Zero Option	If value is null, it will be treated as "0". If "Treat Null as Zero" is checked, and if either one or both inputs are null, treat null as zero. If unchecked, and if either input is null, then ignore those periods.

Ratio

The Ratio type of Metric calculates the ratio between two values, either as a fraction or a percentage.

Table 8-15 Ratio Metric

Item	Details
Formula	Result = A / B
Percent Formula	Result = 100 * (A / B)
Input Streams	Any one or two stream(s). A = B is permitted, but only if Period Offset or Generation Offset <>0.
Output Stream	Any stream.
Offset Type	Select radio button - period or generational
Offset Quantity	Text entry box - integer >= 0, default = 0
Available at leaf	Yes
Available at sum	Yes. The inputs are the aggregate values.
Available at overlay	Yes. The inputs are the overlay values.
Treat Null as Zero Option	If checked, null values will be treated as zero.

Product

The product metric multiplies data streams together.

Table 8-16 Product Metric

Item	Details
Formula	Result = A * B
Percent Formula	N/A
Input Streams	Any two streams.
Output Stream	Any one stream.
Offset Type	N/A
Offset Quantity	N/A
Available at leaf	Yes
Available at sum	Yes. The inputs are the aggregate values.
Available at overlay	Yes. The inputs are the overlay values.
Treat Null as Zero Option	If checked, null values will be treated as zero.

Sum

The sum metric adds multiple data streams together, on a period-by-period basis. You can select up to 10 stream combinations to create the sum. All input streams will have the same accumulation rule, and the output stream will also have this same accumulation rule. Available only at leaf/base periods.

Table 8-17 Sum Metric

Item	Details
Formula	Sum of 1-10 streams at base periods.
Input	All streams should have the same accumulation rule.

Table 8–17 (Cont.) Sum Metric

Item	Details
Output	Same accumulation rule as the input streams.
Leaf	Yes
Sum	No
Overlay	No
Null / Zero Handling	Nulls will be treated as zeros.

Time Average

The "Time Average" metric is the value of a single data stream averaged over a rolling horizon, with optional data filtering. The filters remove the "H" highest and "L" lowest values in the specified horizon before calculating the average of the remaining values.

Table 8–18 Time Average Metric

Item	Details
Formula	$R_x = \frac{1}{n} \sum_{y=1}^n A_{x+y}$ <p>where: R_x = result at period "x" A_{x+y} = data stream at period "x+y" n = number of period to average</p>
% Formula	N/A
Input Streams	Any one stream.
Output Stream	Any stream.
N	# of periods to average (relative to period x) Could be either leading or trailing.
High Filter = H	H is an integer such that H+L < n
Low Filter = L	L is an integer such that H+L < n
Available at leaf	Yes
Available at sum	Yes. The input values are the aggregates.
Available at overlay	Yes. "n" is automatically set to the number of base periods in each overlay item. (If period overlay is chosen, high and low filter options are not available.)
Treat Null as Zero Option	If checked, null values will be treated as zeros.

Examples:

Table 8–19 Time Average Example

n=3:	R(1)=(A1+A2+A3)/3, R(2)=(A2+A3+A4)/3, ...
n=4:	R(6)=(A6+A5+A4+A3)/4, R(7)=(A7+A6+A5+A4)/4, ...
n=5, H=1, L=1:	For each 5-period window, throw out the highest value and the lowest value, and average the remaining three values.
n=7, H=2, L=0:	For each 5-period window, throw out the two highest values, and average the remaining five values.

Variability

This METRIC measures the period-to-period variability in a data stream, using the Mean Absolute Deviation method (or the Percent Mean Absolute Deviation method). It applies on a rolling basis across some user-defined horizon. For example, if the data stream is: 10, 17, 12, 11, 15, 13, and the horizon is specified as 6, the average is 13, and the MAD is $(3+4+1+2+2+0)/6=2$. In percentage terms, this is $100 * 2/13 = 15.39\%$

Table 8–20 Variability Metric

Item	Details
Formula	$R = \frac{1}{n} \sum_{x=1}^n A_x - \bar{A} $ <p>where: R = result A_x = Data stream A at period x \bar{A} = Average of Data stream A</p>
% Formula	$R = 100 \frac{1}{n} \sum_{x=1}^n A_x - \bar{A} $
Input Streams	Any one stream.
Result Stream	Any measure stream.
Additional Items	Number of Periods To Average: text entry box for number of periods - must be an integer; can go either forward or backward.
Available at leaf	Yes
Available at sum	Yes
Available at overlay	Yes. If at an overlay, the horizon is automatically set to match the number of base periods in each overlay item.
Treat Null as Zero Option	If checked, null values will be treated as zeros.

Weighted Average Forecast Error

This Metric calculates forecast error for single periods, either on an absolute or percentage basis. Available only at folder-level, it creates aggregated error or accuracy for all collaboration items under that folder.

Example: Category X contains two products, A and B. Product A had a forecast of 12 and actual sales of 10. Product B had a forecast of 19 and actual sales of 20. Average forecast error at Category X, using "actual" as the weighting factor, is:

Product A: $\text{abs}(12-10)/10=20\% * 10 = 200\%$

Product B: $\text{abs}(19-20)/20=5\% * 20 = 100\%$

Category X: $(200\% + 100\%) / (10+20) = 300\% / 30 = 10\%$

Table 8–21 Weighted Average Forecast Error

Item	Details
Error Formula	$R_x = \frac{1}{W_x} \sum_{x=1}^n F_x - A_x W$ <p>where: R = result Fx = Forecast for product x Ax = Actual for product x Wx = Weighting Factor for product x</p>
% Error Formula	$R = 100 \frac{1}{W_x} \sum_{x=1}^n \left \frac{F_x - A_x}{D_x} \right W$ <p>where: R = result Fx = Forecast for product x Ax = Actual for product x Dx = Either Forecast or Actual can be selected for the denominator Wx = Weighting Factor for product x</p>
% Accuracy Formula	Result = 100 - % Error
Input Streams	Any two streams
Result Stream	Any measure stream
Additional Item	Generational offset = # of generations back to take the forecast value. Text entry, restricted to integers >= 0, default = 0 (i.e., current stream).
Weighting Basis	Pick either Actual or Forecast
Available at leaf	Yes, when Period Overlay is used.
Available at sum	Yes
Available at overlay	Yes. When using period overlay, computation will be for each base period within the period overlay item and not a SUM on periods.
Treat Null as Zero Option	If checked, null values will be treated as zeros.

Access Control

Access control to the METRIC functions is as follows:

Table 8-22 Access control to the METRIC functions

	Main Menu	Sub Menu	Tabs	Buttons / Other	super-user	Super-Admin	Admin	Manager	Super-visor	Plan-ner	Reviewer
Metrics		List			✓	✓	✓	✓	✓	✓	✓
		Create			✓	✓	✓	✓			
		==>	Delete		✓	✓	✓	✓			
		==>	Process on Demand		✓	✓	✓	✓	✓		
		==>	Override Execute Time		✓	✓	✓	✓	✓	✓	
		==>	Details		Edit	Edit	Edit	Edit	View	View	
		==>	Copy		✓	✓	✓	✓	✓	✓	

METRIC definitions are visible and editable to all users of a local company with the appropriate role and hierarchy permissions. Metric streams are access controlled the same as any other data stream would be.

Preferences

This chapter contains the following sections:

- [Introduction](#)
- [General Preferences](#)
- [Layout](#)
- [Setting Preferences for the User Defined Fields](#)
- [Setting Preferences for Copy Promotions](#)
- [Changing Your Password](#)

Introduction

Any option that you can choose to view, you can set as a personal preference so that it appears by default when you use Oracle Retail VCC. This allows you to personalize Oracle Retail VCC according to your requirements. You can choose the layout you desire and localize the display for your language, number and date format, and time zone. You can even set your home page to display a particular screen within the product. Some of the layout preferences you can configure include

- the general appearance and source indicator for data streams
- display of the period columns in Data screen views
- the look and feel of the Exception - Inbox
- the look and feel of the Exception - Criteria - List view
- the look and feel of the Promotions - List view
- the look and feel of the Extract - List view
- the look and feel of the Metrics - List view

General Preferences

The **General** preferences feature allows you to select the Language, Number Format, Date Format, Time Format, Detected Time Zone, Time Zone, Product Label for Tree Display, Default Context, Default Screen and Themes.

To set the general preferences

1. Select **Preferences - General**. The **General** screen appears.

Figure 9–1 General Screen

The screenshot shows the 'Preferences - General' window with the following settings:

Language:	American English
Number Format:	-123,456.78
Date Format:	mm/dd/yy
Time Format:	HH:mm:ss
Detected Time Zone:	EST
Time Zone:	Use Detected Time Zone
Product Label:	Name
Default Context:	Last Viewed
Default Screen:	Home
Theme:	Tea Leaves

A green 'Set' button is located at the bottom left of the form.

2. Select your Language from the drop-down list.
3. Select your Number Format from the drop-down list.
4. Select your Date Format from the drop-down list.
5. Select your Time Format from the drop-down list.
6. Oracle Retail VCC detects your time zone and displays it as the "Detected Time Zone" (e.g., EST, for Eastern Standard Time). If you wish to use this detected time, select "Detected Time Zone" from the drop-down list. Select your time zone from the drop-down list.
7. Select how you want the Product Labels to display. Click the radio buttons to display product name, GIN (global item number), or LIN (local item number).
8. Select the Default Context you would like to see directly after login. Last Viewed indicates the last context you accessed. All other contexts must be bookmarked through the Context Chooser before they will appear in the default context drop-down list. If you have no contexts bookmarked, the only option will be Last Viewed.
9. Select the Default Screen you wish to see after login. Options will include any viable module screen or subscreen that can be accessed through the menu. Since this is subject to your company configuration and user role, options will vary in the drop-down. The default is Home.
10. Select your color Theme from the drop-down list. You have the choice of "Evening Sky" (default), "Tea Leaves," or "Rocket Fuel." Have fun!
11. Click **Set**.

Layout

Access to these features: superadmin, admin, manager, supervisor, planner, and reviewer.

The **Preferences - Layout** screen controls the content and display of the following Oracle Retail VCC components:

- Data - Table/Graph
- Inbox Filters
- List Screens

Table/Graph Preferences

The Table/Graph preferences allow you to modify the following subscreens:

- [Setting Table/Graph Defaults Preferences.](#)
- [Creating and Editing Period Overlays.](#)
- [Setting Highlight Source Preferences.](#)
- [Creating and Editing Groups.](#)

Setting Table/Graph Defaults Preferences

The Table/Graph **Defaults** screen allows you to set the following items that define how data streams will appear:

- Display Mode. Choose your default display mode from those created in the Data - View/Edit, or use the "Default" display mode, which consist of the following (for details, see [Display Mode](#)):
 - Screen View: Table
 - Period View: Base Period
 - Comparison: Local Curr - Partner Curr
 - UOM: Base Units
 - Group: All
- Stream Period Display (Begin Date or End Date)
- Start Period (Current Period, **n** periods in the past, **n** periods in the future)
- Number of Period Display columns (number of periods that appear per upload)

Note: If you select the "**n** periods at a time with "**n** periods in the past" option in the **Preferences - Data - Defaults** screen and there is no current period, the periods displayed will default to the first period in the data stream. Otherwise, they will be the periods you select.

- Graph Y Axis (Scale to fit, Min, and Max according to the values you enter). This lets you choose the best way to view data streams in graph mode.
- Collapse empty columns (in the past or in the future). Oracle Retail VCC allows you to collapse empty time buckets in table mode to more easily view data without having to scroll to the left or to the right. If there are six or more consecutive empty time buckets across all the data streams being retrieved at a context, those columns can be collapsed so that they will not be displayed. This feature can be used for the following cases:
 - You and your partner collaborate using uniform weekly data on a Oracle Retail VCC database set up with daily time buckets. If there are six or more consecutive empty time buckets across all the data streams being retrieved at a context, those columns are collapsed. Collapsed periods may be in the past or in the future.
 - You and your partner collaborate using daily history information, but have data streams with differing time buckets (daily, weekly, monthly, or quarterly). If there are six or more consecutive empty time buckets in the future across all the data streams being retrieved at a context, those columns are collapsed.

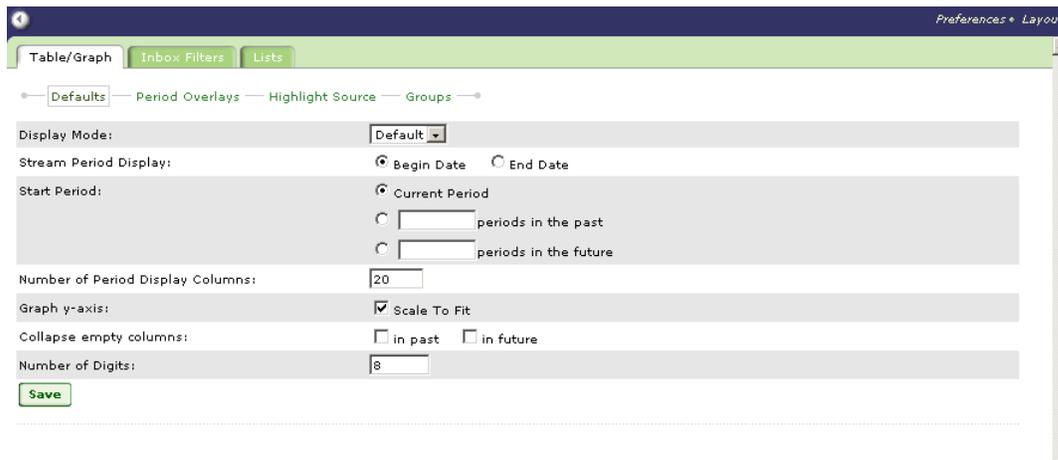
Unlike when you and your partner use uniform data, periods in the past are not collapsed. This prevents "locking out" daily product activity data edits for past periods by inadvertently collapsing them.

- Number of Digits is used to specify the default width of each column in the table view. This does not apply to the data contained in the column, only to the width of the column containing the data. Maximum column width is 22 digits wide.

To set your preferences in **Defaults**

1. Select the **Preferences - Layout- Data - Defaults** subtab. The following screen appears in the **Display** pane.

Figure 9–2 Table/Graph Screen



2. Choose your data stream default settings.
3. Click **Save** and your data stream preferences are set.

Creating and Editing Period Overlays

In Oracle Retail VCC, your data is displayed across time. Depending on how your Oracle Retail VCC database is configured, the data will display in a time series where the base periods are either weekly or daily. Base periods represent the smallest or leaf-level time series "buckets" to contain your data.

A period overlay allows data to be viewed in a time series folder or aggregate-level bucket. For example, if you have a daily database and your sales forecast data for next week shows a value of 10 for each day (bucket), you could create a period overlay named 'Next Week', that includes all of next week's buckets. When you view your Sales Forecast data in this period overlay, it will show the value at 70 (10 x 7).

The available base periods will usually be sorted into a 'hierarchy' or 'tree' (by the Oracle Retail VCC Administrator) consisting of various folder levels like weekly or monthly or quarterly. You can use these categories or you can select individual periods to create your period overlays.

Base Periods is the default view for your data in **Data - View**. The View select box in the **Chooser - Display Mode** allows you to choose your "view" from among Base Periods and any other company- or user-level period overlays that are listed. You can change the default view to one of the period overlays in the **Preferences - Layout - Data - Defaults** screen.

Period overlays allow you to view data from leaf or aggregate contexts (location, partner, product) in a leaf (base periods) or an aggregate (period overlay) time series view.

Company-level period overlays are set up by the Oracle Retail VCC Administrator (**Company - General Config - Period Overlays**). A period overlay created at the company level is available to any of that company's users.

User-level period overlays are created through the (user) **Preferences** menu (**Preferences - Layout - Data - Period Overlays**). A Period Overlay that is created by an individual user can only be accessed by that user.

Period overlays can be created in a fixed, rolling, or telescoping format. These are described below.

Note: For all overlay formats, if the overlay is currently in use, it cannot be deleted.

Creating a Fixed Period Overlay

A fixed **Period Overlay** allows you to group the time periods you select into a single folder to view the accumulated data stream figures for all the fixed time periods within the folder. For example, you could create a period overlay that contains all the summer months in 2001 and call it "Summer 2001." When you apply the overlay to a stream, the stream contains time periods in monthly increments that contain the accumulated weekly data streams for each month.

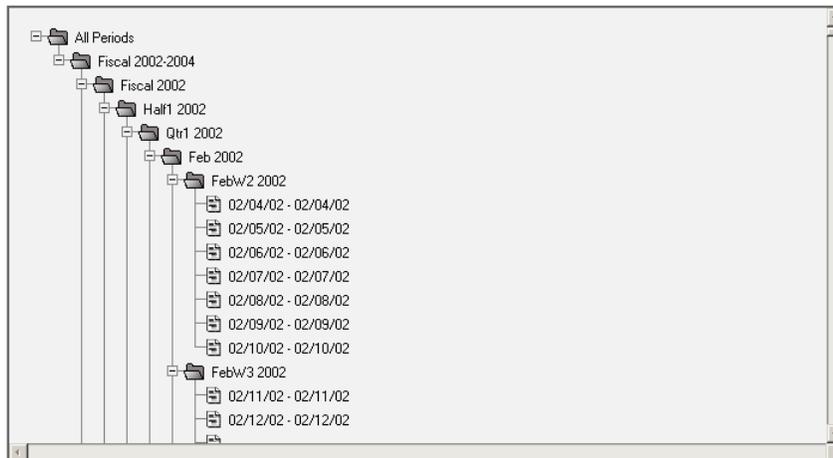
To create a new fixed period overlay

1. Click **Preferences - Layout - Table/Graph - Period Overlay** (for individual user overlays) or click **Company - General Config - Period Overlays** (for company-level overlays). Any existing period overlays are displayed in the **List** screen.

Figure 9–3 *Table/Graph - Period Overlay Screen*



2. Click the **Create** button and the screen to create period overlays appears in the **Display** pane.
3. Enter the period overlay name in the **Name** field (no more than 40 alphanumeric characters) text box. For example, if you highlighted the individual Summer months in a year or Qtr 3, you could call the overlay "Summer 2001."
4. Select the **Fixed** radio button (default). A period tree appears.

Figure 9–4 Period Tree

5. Select the time period(s). Open the period folder only to the level at which you want to create the overlay. For example, if you created categories (not overlays) for each month, and you want to create a period overlay called "Monthly," open the period folder only to the monthly level so the weekly buckets do not display. To create a "Quarterly" period overlay, open the period folder only to the quarterly level. Do not display the monthly or weekly levels.

Select the time periods you want to include in the overlay. To select more than one consecutive period, highlight the first item that you want to include in the overlay and then hold down the "Shift" key to highlight any additional items.

To select more than one non-consecutive period (e.g., Qtr 1 and Qtr 3), highlight the first item that you want to include in the overlay and then hold down the "Ctrl" key to highlight any additional items.

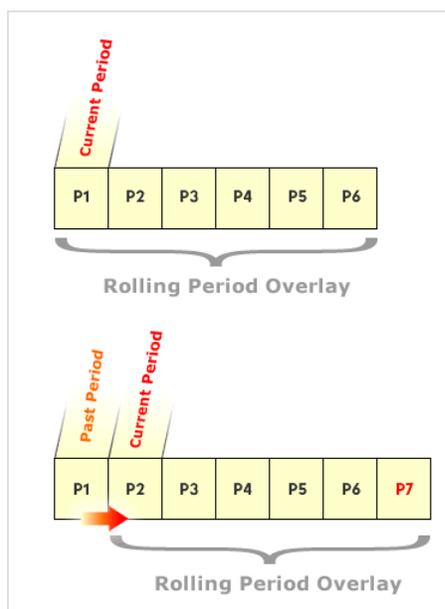
6. Click **Save**. The overlay appears in the **Period Overlays** screen.

Creating a Rolling Period Overlay

A rolling period overlay is not fixed in time but rolls forward with each new stream period and does not become obsolete once the time period passes. For example, starting from the current period, you can aggregate eight periods into a single period overlay. As the current period becomes the past period, you still can apply the period overlay to aggregate eight periods into the future. It rolls forward with time and continues to aggregate the eight future periods.

In the figure below, a rolling period overlay is defined for six time periods (P1 through P6). As P2 becomes the current period and P1 becomes the past period, the overlay moves forward in time to meet the new week, P7.

Figure 9–5 Rolling Period Overlay



To create a rolling period overlay

1. Click **Preferences - Layout - Data - Period Overlay** (for individual user overlays) or click **Company - General Config - Period Overlays** (for company-level overlays).
2. Click the **Create** button and the create period overlay screen appears in the **Display** pane.
3. Select the **Rolling** button, and the rolling period overlay screen appears in the **Display** pane.

Figure 9–6 Rolling Period Overlay Screen

4. Enter a name for the period overlay (no more than 20 alphanumeric characters).
5. Your period overlay begins at the current base period (defined as daily or weekly in your database) unless you specify a reference period number. Entering a start reference directs the period overlay to begin before or after the current base period. To begin the period overlay before the current base period, enter a negative number. To begin after the current base period, enter a positive number. For instance,

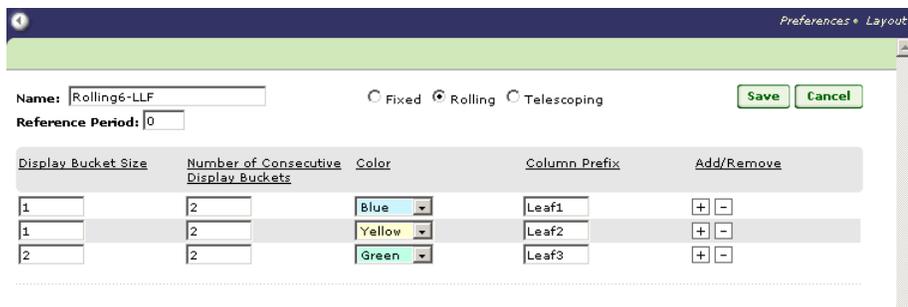
In a daily database: if the current date is 9/7 and the Reference Period number is -3, the Period Overlay will begin on 9/4.

In a weekly database: if the current week begins on 9/7 and the Reference Period number is 3, the Period Overlay will begin on 9/28.

6. Enter the Display Bucket Size (e.g., 1 = Day, 7 = Week, 28 = Month, 365= Year); where 1=Day if your base periods are days, 1= Week if your base periods are weeks, etc.
7. Enter Number of Consecutive Display Buckets.
8. Select a color that you want your rolling period overlay to display. The color you choose is the color that will mark your overlay.
 - Green
 - Blue
 - Yellow
 - Orange
 - Purple
9. Enter a Column prefix. This will display in the data stream table view on the period column heading (e.g., enter "Week" if the overlay is weekly).
10. If you want to show more than one display bucket in the same overlay, click the "+" button and a new display bucket characteristic entry line appears. Enter the characteristics of the new display bucket. To remove a display bucket, click the "-" button.

For example, if you created a rolling period overlay with three bucket display sizes of 1, 7, and 28 that had the number of consecutive display buckets of 7, 4, and 4, your rolling period overlay creation screen would appear as below.

Figure 9–7 Rolling Period Overlay Screen



11. Click **Save**. The new overlay appears in your period overlay list. Once an overlay has been created, it appears in **Period View** under the **Display Mode** tab of the **Context Chooser**. When this overlay is selected, your data stream table view would appear as below.

Figure 9–8 Data Stream Table View

	Leaf1 1	Leaf1 2
Local Curr		
POS Forecast (Base)		
• POS Forecast (Prom)	33.00	44.00
POS Forecast (Seas)		
• POS Forecast (Total)	33.00	44.00
Partner Curr		
POS Forecast (Base)		
POS Forecast (Prom)		
POS Forecast (Seas)		
POS Forecast (Total)		
Local Curr		
Ship Forecast Base		
Ship Forecast Promo		
Ship Forecast Adj		
Ship Forecast Total		
Partner Curr		
Ship Forecast Base		
Ship Forecast Promo		
Ship Forecast Adj		
Ship Forecast Total		
Yr-Ago POS (Base)		

Creating a Telescoping Period Overlay

Telescoping period overlays are similar to rolling period overlays except the time buckets are not fixed. They allow you to specify the number of time buckets in the overlay, but the telescoping period overlay automatically rounds up any extra time buckets in the overlay to get to the next size.

To create a telescoping period overlay

1. Click **Preferences - Layout - Data - Period Overlay** (for individual user overlays) or click **Company - General Config - Period Overlays** (for company-level overlays).
2. Click the **Create** button and the create period overlay screen appears in the **Display** pane.
3. Select the **Telescoping** button, and the telescoping period overlay screen appears in the **Display** pane.

Figure 9–9 Telescoping Period Overlay Screen

Name:
 Fixed Rolling Telescoping
 Save Cancel

Period:
 Reference Period:
 Use existing period labels

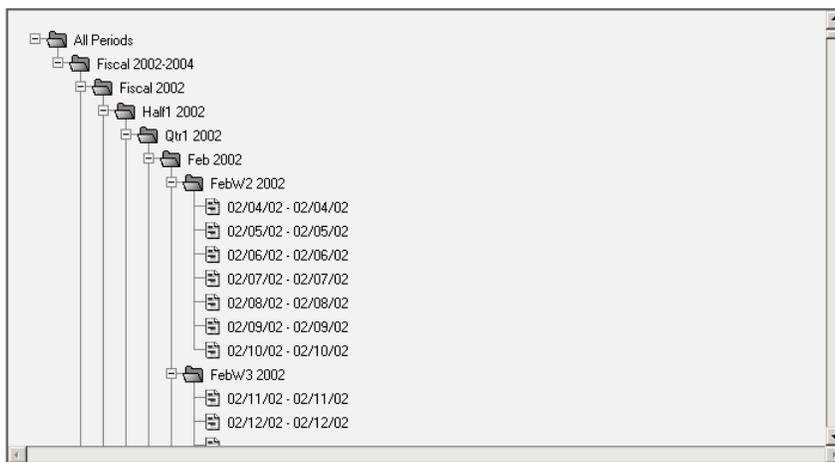
Levels Above Base Periods	Minimum Number of Consecutive Display Buckets	Color	Column Prefix	Add/Remove
<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="Blue"/>	<input type="text" value="N/A"/>	<input type="button" value="+"/> <input type="button" value="-"/>

4. Enter a name for the period overlay (no more than 20 alphanumeric characters).
5. Your period overlay begins at the current base period (defined as daily or weekly in your database) unless you specify a reference period number. Entering a start reference directs the period overlay to begin before or after the current base period. To begin the period overlay before the current base period, enter a

negative number. To begin after the current base period, enter a positive number. For instance, in a daily database: if the current date is 9/7 and the Reference Period number is -3, the Period Overlay will begin on 9/4. In a weekly database: if the current week begins on 9/7 and the Reference Period number is 3, the Period Overlay will begin on 9/28.

6. Uncheck the "Use existing period labels" check box if you do not want to use the existing period labels. You will be prompted to enter a Column Prefix if this box is not checked.
7. Click the **Period** link and the period tree screen appears in the **Display** pane. Select Base Period, a time period folder (cannot select at leaf level), and click the **Close** button in the upper right-hand corner of the period tree screen to continue.

Figure 9–10 Period Tree



8. Enter the "Levels Above Leaf":
 - 0 - leaf level
 - 1 - folder level containing the leaf
 - 2 - next folder level

Note: Levels must be entered in ascending order (i.e., 0, 1, 2 **not** 2, 0, 1).

9. Enter "Minimum Number of Consecutive Display Buckets" that you want to include for each level.
10. Select a color that you want your telescoping period overlay to display. The color you choose is the color that will mark your overlay.
 - Green
 - Blue
 - Yellow
 - Orange
 - Purple

11. If you would like to override the column prefix labels that will be displayed in Data - View/Edit - table view, uncheck the "use existing period labels" check box, and the inaccessible fields that previously read "N/A" will be working text fields.
12. If you unchecked "Use Existing Period Labels", you must enter a Column prefix. This will display in the data stream table view on the period column heading (e.g., enter "Week" if the overlay is weekly). Column Prefix defaults to the existing period labels which are configured in the Company - Master Data - Period tree.
13. If you want to show more than one display bucket in the same overlay, click the "+" button and a new display bucket characteristic entry line appears. Enter the characteristics of the new display bucket. To remove a display bucket, click the "-" button.
14. Click **Save**. The new overlay appears in your period overlay list. Once an overlay has been created, it appears in the **View by Period drop-down** under the **Display Mode** tab of the **Context Chooser**. When this overlay is selected, your data stream table view would appear highlighted as seen below.

Figure 9–11 Data Stream Table View

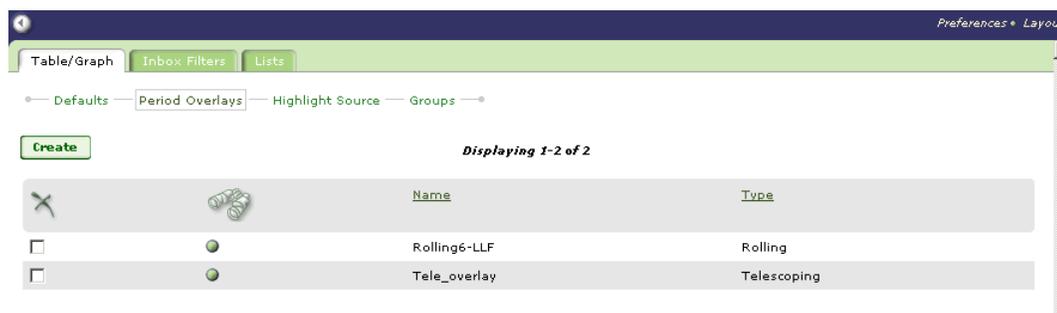
	03/29/03	03/30/03 - 04...	04/06/03 - 04...	04/13/03 - 04...	04/20/03 - 04...	May 2003	Jun 2003	Qtr 3 2003	Qtr 4 2003	Half 2004	Half 2 2004
Local Curr											
• Sales Fost (Base)	33.00	84.00	63.00	112.00	161.00	199.00	171.00			61.00	201.00
• Sales Fost (Prom)											
• Sale Forecast (Sear)			90.00				55.00			90.00	0.00
• Sales Fost (Total)	33.00	84.00	153.00	112.00	161.00	199.00	226.00			151.00	201.00
Partner Curr											
• Sales Fost (Base)											
• Sales Fost (Prom)											
• Sale Forecast (Sear)											
• Sales Fost (Total)											

Editing, Renaming, and Viewing a Period Overlay

To select, delete, view, rename, or create a new period overlay

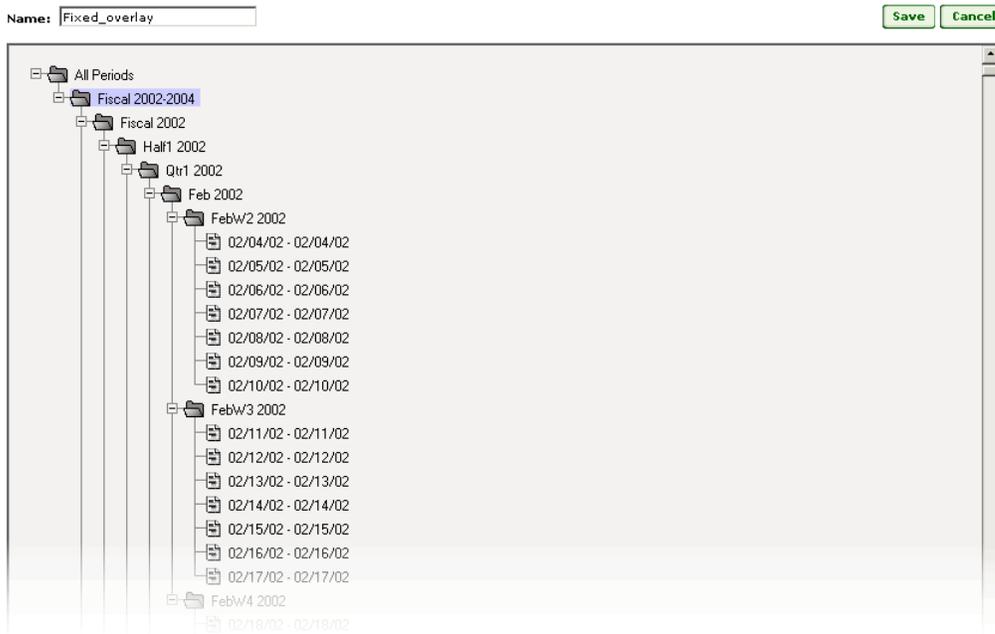
1. Click **Preferences - Layout - Table/Graph - Period Overlay** (for individual user overlays) or click **Company - General Config - Period Overlays** (for company-level overlays).

Figure 9–12 Table/Graph - Period Overlay Screen



2. Click the colored dot next to the overlay you want to view.
 - A fixed overlay is displayed showing its name and a period tree with its period highlighted. You can rename the overlay or change the time period. Click Save to save your edits.

Figure 9–13 Period Tree



- A rolling overlay is displayed showing the display bucket size, number of consecutive buckets, each bucket color, and each bucket's column prefix as it appears in the **Data - View** screen. You can rename the overlay, change the display bucket size, change the number of consecutive display buckets, change the display bucket color, change the column prefix, or add/remove time buckets. Click **Save** to save your edits.

Figure 9–14 Preferences - Layout Screen



- A telescoping overlay is displayed showing the period, levels above leaf, minimum number of consecutive buckets, each bucket color, and each bucket's column prefix as it appears in the **Data - View** screen. You can rename the overlay, change the time period, change the display bucket size, change the number of consecutive display buckets, change the display bucket color, change the column prefix, or add/remove time buckets. Click **Save** to save your edits.

Figure 9–15 Preferences - Layout Screen

The screenshot shows the 'Preferences - Layout' window. At the top, the name is 'Tele_overlay' and the period is 'All Periods'. The reference period is set to '0'. There are 'Save' and 'Cancel' buttons. A checkbox 'Use existing period labels' is checked. Below this is a table with columns: 'Levels Above Base Periods', 'Minimum Number of Consecutive Display Buckets', 'Color', 'Column Prefix', and 'Add/Remove'.

Levels Above Base Periods	Minimum Number of Consecutive Display Buckets	Color	Column Prefix	Add/Remove
0	1	Blue	N/A	+ -
1	1	Yellow	N/A	+ -
2	1	Green	N/A	+ -

3. Click **Cancel** when you are finished viewing the overlay to return to the main **Period Overlay** subtab view, or **Save** to retain any changes you made while on the screen.

Setting Highlight Source Preferences

Highlight Source allows you to color tag data streams to indicate how that number was created. The list below shows the possible data stream sources that can be color-tagged. Each data stream source displays in color

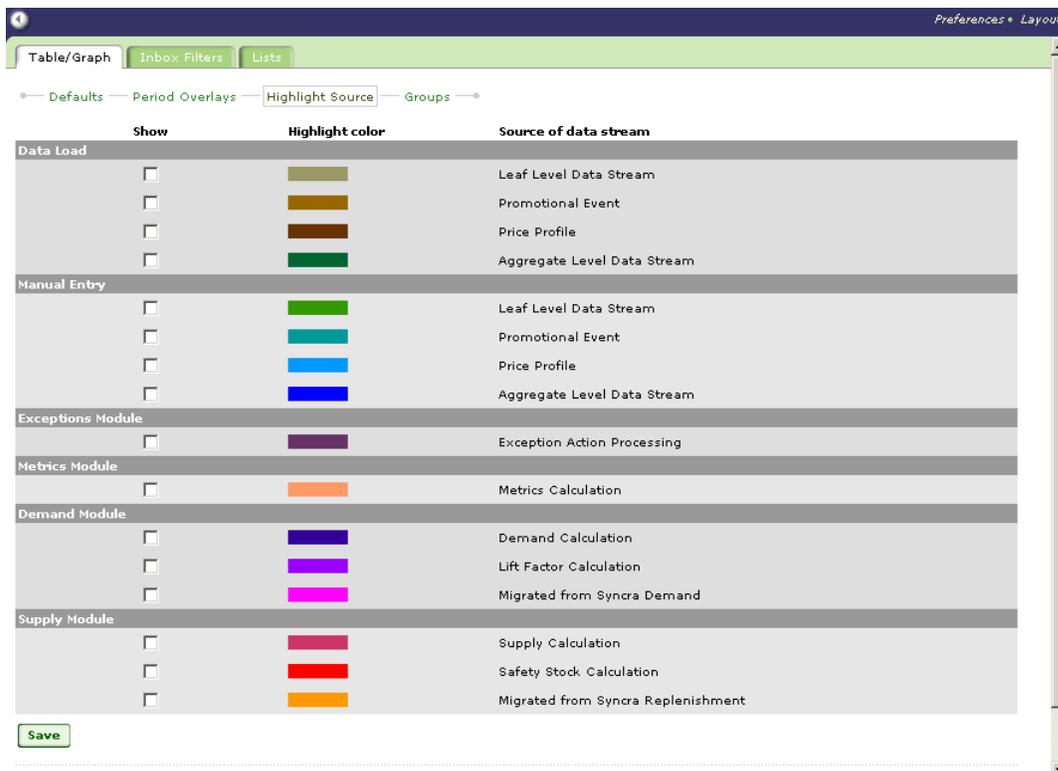
- Data Load
 - Leaf Level Data Stream
 - Promotional Event
 - Price Profile
 - Aggregate Level Data Stream
- Manual Entry
 - Leaf Level Data Stream
 - Promotional Event
 - Price Profile
 - Aggregate Level Data Stream
- Exceptions Module
 - Exception Action Processing
- Metrics Module
 - Metrics Calculation
- Demand Module
 - Demand Calculation
 - Lift Factor Calculation
 - Migrated from Oracle Retail VCC Demand
- Supply Module
 - Supply Calculation
 - Safety Stock Calculation
 - Migrated from Oracle Retail VCC Supply

Note: You will not see the Exceptions Module, Metrics Module, Demand Module, or Supply Module sections in the Highlight Source screen if you do not have access to the appropriate modules.

To highlight data streams

1. Click **Preferences - Layout - Data - Highlight Source**. The Highlight Source screen appears.

Figure 9–16 Highlight Source Screen



2. When the **Highlight Source** screen appears, check the box next to the stream source that you want to highlight.
3. Click **Save**. Now, when a stream is created or changed by a source you chose to highlight, the data will appear in the color code for that source.

Creating and Editing Groups

There are two kinds of data stream groups: company and user-defined.

Company-defined data stream groups are created by an admin user (superuser, server admin, superadmin, or admin) in the **Configuration - Groups** screen for a selected company. The company-defined groups can be viewed, but not modified, by company users. User-defined data stream groups are created and modified by the individual user. A user-defined group can only be viewed by the user who created it.

Groups allow you to combine data stream subtypes that will appear when you select a context. As a user, you may have access to all streams that have been assigned to your company by the superuser or server admin. Some of these streams may not impact

your particular duties and therefore do not need to be accessed by you. This feature lets you combine streams that you need into user-defined groups.

In **Groups** you can

- [Edit Groups](#)
- [Add Groups](#)
- [Remove Groups](#)
- [Previewing Groups](#)

Edit Groups

To edit user-defined groups

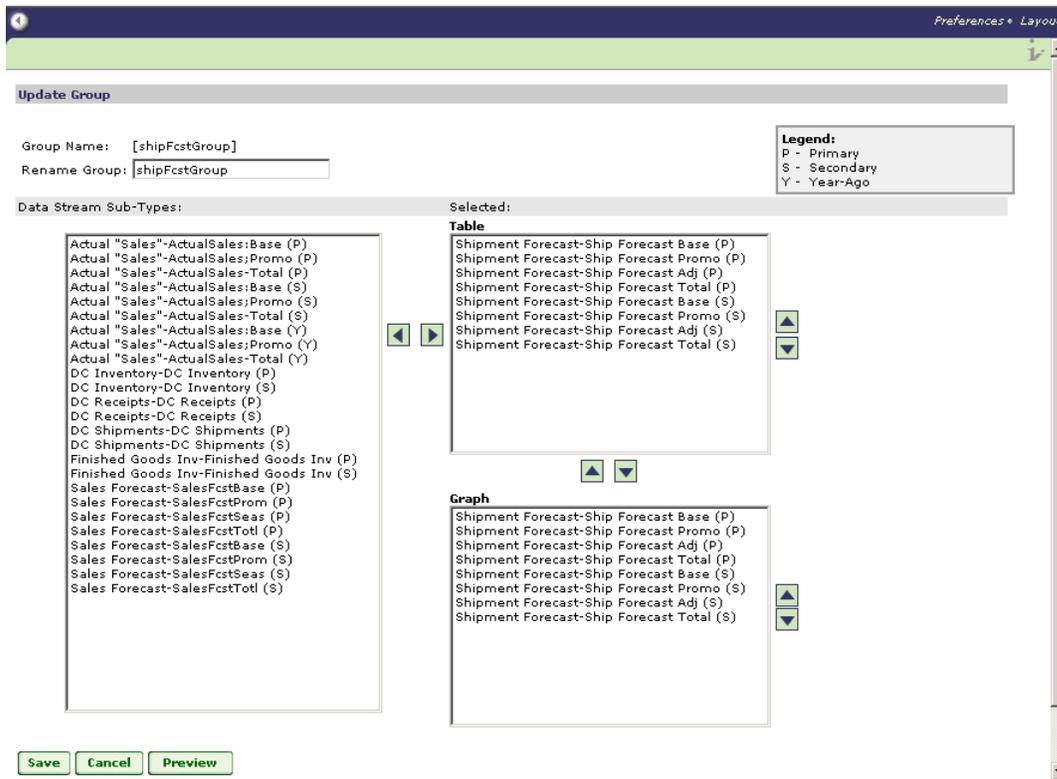
1. Click **Preferences - Layout - Data - Groups** (for individual user groups) or click **Company - General Config - Groups** (for company-level groups). The Groups screen appears.

Figure 9–17 *Groups Screen*



2. Select the group you want to edit. Click **Edit** and the **Edit** pane appears:

Figure 9–18 Edit Pane



Streams can have the designation of Primary, Secondary, and Year-Ago, as shown in the legend. Depending on the comparison type these designations apply to different streams. For example, if the comparison type is

- Local Current to Local Previous, the Primary data stream is your local current data stream and the Secondary data stream is your local previous data stream.
 - Local Current to Partner Current, the Primary data stream is your local current data stream, the Secondary data stream is your partner's current data stream, and the Year-Ago data stream is either your local or your partner's year ago data stream. (Year-Ago streams are only editable by the buyer or seller. Year-Ago streams are not available for streams editable by both.)
 - Partner Current to Partner Previous, the Primary data stream is your partner's current data stream and the Secondary data stream is your partner's previous data stream.
3. In the **Edit** pane, you can rename the group (no more than 40 alphanumeric characters). Use the left/right arrows to select/deselect streams, and/or use the up/down arrows to arrange the order of the streams when they are displayed.

Note: In order for your group to display properly in **Data - View**, for each substream selected, make sure that the selected designations are in this order: primary, secondary and year-ago.

For example, if your group includes stream types sales forecast, actual sales and seller inventory, your ordering of `selected' subtypes should show:

- First: sales base primary, sales promo primary, sales seasonal primary. Then, sales base secondary, sales promo secondary, sales seasonal secondary.

Your ordering of `selected` subtypes should show:

- First: sales base primary, sales promo primary, sales seasonal primary. Then, sales base secondary, sales promo secondary, sales seasonal secondary.
- or,
- Actual sales base primary, Actual sales promo primary
 - Actual sales base secondary, Actual sales promo secondary
 - Actual sales base year-ago, Actual sales promo year-ago
4. Click the "Streams Info" icon to display your company's assigned data streams in a separate browser. For details, see Help - Stream Info in [General Icons](#).
 5. Click **Save** to save the edit(s) and return to the **Groups** subtab. Click **Cancel** to cancel the edit(s) and return to the **Groups** subtab.

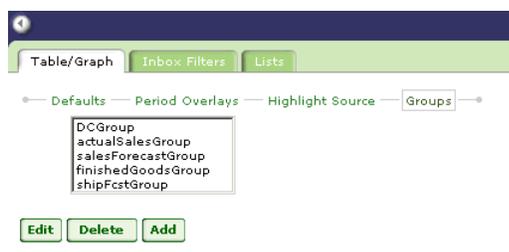
Add Groups

To add groups

1. Click **Preferences - Layout - Data - Groups** (for individual user groups) or click **Company - General Config - Groups** (for company-level groups). The Groups screen appears.

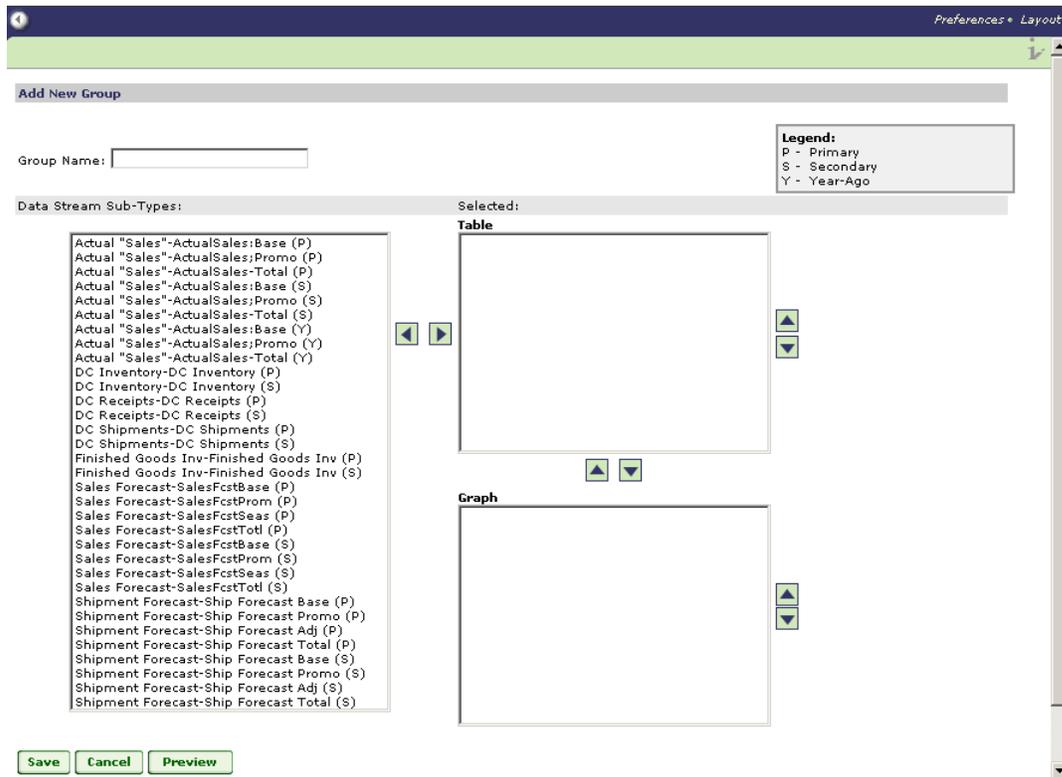
If you have created groups already, they will appear in the list.

Figure 9–19 Groups Screen



2. Click **Add** and the **Add** pane appears:

Figure 9–20 Add Pane



3. In the **Add** pane, enter a name for the new group (no more than 40 alphanumeric characters).
4. Use the left/right arrows to select the streams you want to add to the new group.
5. Use the up/down arrows to arrange the order of the streams when the new group is displayed.
6. The up/down arrows located between the Table and Graph boxes move streams into and out of the Graph select box. This allows you to display groups in the Table that may not appear in the Graph. However, any groups that will be displayed in the Graph must also be displayed in the Table.
7. Click **Save** to save the new group and return to **Groups**. Click **Cancel** to cancel the action and return to **Groups**.

Remove Groups

To remove groups

1. Click **Preferences - Layout - Data - Groups** (for individual user groups) or click **Company - General Config - Groups** (for company-level groups). The Groups screen appears.

Figure 9–21 Groups Screen



2. Select the stream you want to remove.
3. Click **Delete**.

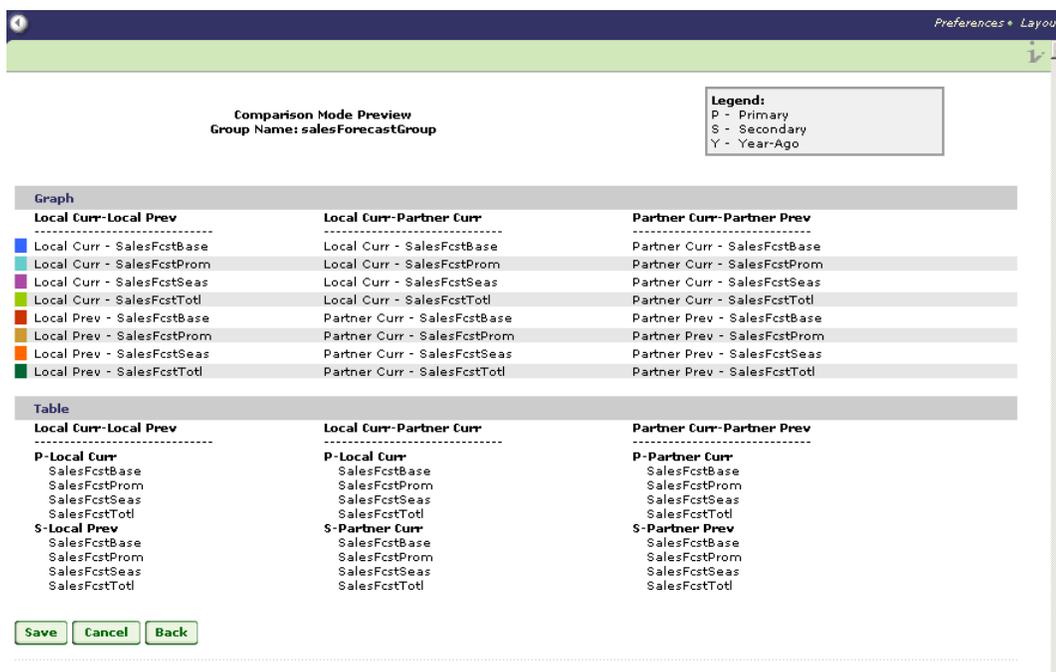
Previewing Groups

Access To This Feature: Superuser, Server Admin, SuperAdmin, Admin

Once you have created groups for your company, you can preview how the groups will appear. To preview your groups

1. Click **Preferences - Layout - Data - Groups** (for individual user groups) or click **Company - General Config - Groups** (for company-level groups). The Groups screen appears.
2. Click the **Groups** tab. The **Groups** screen appears.
3. Select either "Add" or "Edit."
4. Click the **Preview** button. The Preview screen appears showing how the defined group will display in the **Data - View** Table/Graph for three comparison modes.

Figure 9–22 Preview Screen



Setting Inbox Filters Preferences

Filters allows you to create and edit filters to sort the exceptions.

To create or edit an **Inbox Filter**

1. Click **Preferences - Layout - Inbox Filters** and the **Inbox Filters** screen appears.

Figure 9–23 *Inbox Filters Screen*

2. To create a filter, enter a name for the new filter (no more than 20 alphanumeric characters) and check whichever item(s) you want to be included in the filter. Click **Save**.

To edit a filter, select an existing filter from the drop-down list and make the appropriate changes. The following lists the items that can be edited.

- Period (Before, After, or Between a Fixed/Rolling Date/Period)
- Product name
- Local name
- Partner name
- Severity (Low, Medium, or High)
- Percent (<, >, or = and a percentage)
- Deviation (<, >, or =, and a value)
- Created (Before, After, or Between a Fixed/Rolling Date/Period) Sorts by the creation date.
- Status (Active, In-Process, Auto In-Process, Escalated, Auto Escalated, Auto Incomplete, Superseding)
- UOM

- Type 1
- Type 2
- Criteria Name
- Offset (Period Offset or Generation Offset)
- Shared With (select company shared with)

To return a selected existing filter to its pre-edited settings, click **Revert**.

To delete a filter, select an existing filter from the drop-down list and click **Delete**.

3. Click **Save**.

Setting List Screen Preferences

The Lists preferences tab allows you to choose how the following lists will be displayed.

- Demand Policy
- Events
- Events Calendar
- Exception Criteria
- Exception Inbox
- Extracts
- Metrics
- Promotion Items
- Promotion Item Sublist (tabbed view appearing on Events - Overview - Examine Event screen)
- Promotions
- Promotion Sublist (tabbed view appearing on Events - Overview - Examine Event screen)
- Reports
- Supply Policy

You can set the following preferences for how the list screens appear:

- View (Collapsed or Expanded).
- Number of results per page.
- Hide Columns: Sets which columns will appear, in what order, and which are hidden.
- Set the Multi-Column Sort Order: Sets how the items are sorted when you access the Inbox (e.g., items first are sorted by name, then period, partner, product, etc.). You can set as many (or as few) columns to be sorted as you wish.

To set the **Lists** preferences

1. Click **Preferences - Layout - Lists**. Select the list from the drop-down list and that **List Preference** screen appears.

Figure 9–24 List Preferences Screen

2. Select your view: either Collapsed or Expanded. Refer to Table/Graph Preferences for details about collapsed and expanded views.
3. Enter how many results you want to view by page.
4. For the **Exceptions - Inbox** screen, you may select a default filter to sort the entries in the **Exceptions - Inbox**. See [Setting Inbox Filters Preferences](#) for details on how to create an Inbox filter.
5. Use the arrow buttons to order or hide columns.

To order the columns: Scroll up or down the list of Visible columns and select the column you want to move. Click the "up" or "down" arrows to move the selected column to the Visible list. Each click moves the column one position. When saved, the order you choose will be how the columns appear.

To hide a column: Scroll up or down the list of Visible columns and select the column you want to hide. Click the "right" arrow to add the selected column to the Hidden list. When saved, the columns you moved to the Hidden list will not appear in the list.

To show a column that is hidden: Scroll up or down the list of Hidden columns and select the column you want to show. Click the "left" arrow to add the selected column to the Visible list. When saved, the columns you moved to the Visible list will appear in the list.

6. Use the arrow buttons to set the Multi-Column Sort Order.

To add a column to the Multi-Column Sort Order list: Scroll up or down the list of column(s) on the right and select the column you want to sort. Click the "right" arrow to add the selected column(s) to the multi-column sort list. You can add as many columns as you wish. When saved, items in the list will be sorted automatically by the column(s) you selected.

To remove a column from the Multi-Column Sort Order list: Scroll up or down the list of Hidden columns and select the column(s) you want to remove. Click the "left" arrow to move the selected column to the Available list. When saved, items will not be sorted automatically by the column you removed.

7. Click **Save**.

Note: Streams that have been hidden will not appear when they are selected to be part of a group.

If you are using Oracle Retail VCC with daily time buckets rather than weekly, you will see an additional drop-down option when you select the Exception Inbox view. This new drop-down, Period Configuration, allows you choose how you wish periods to be displayed in the Exception Inbox.

The period display options are

- Beginning of Period
- End of Period
- Beginning and end of Period

Figure 9–25 Preferences - Layout Screen

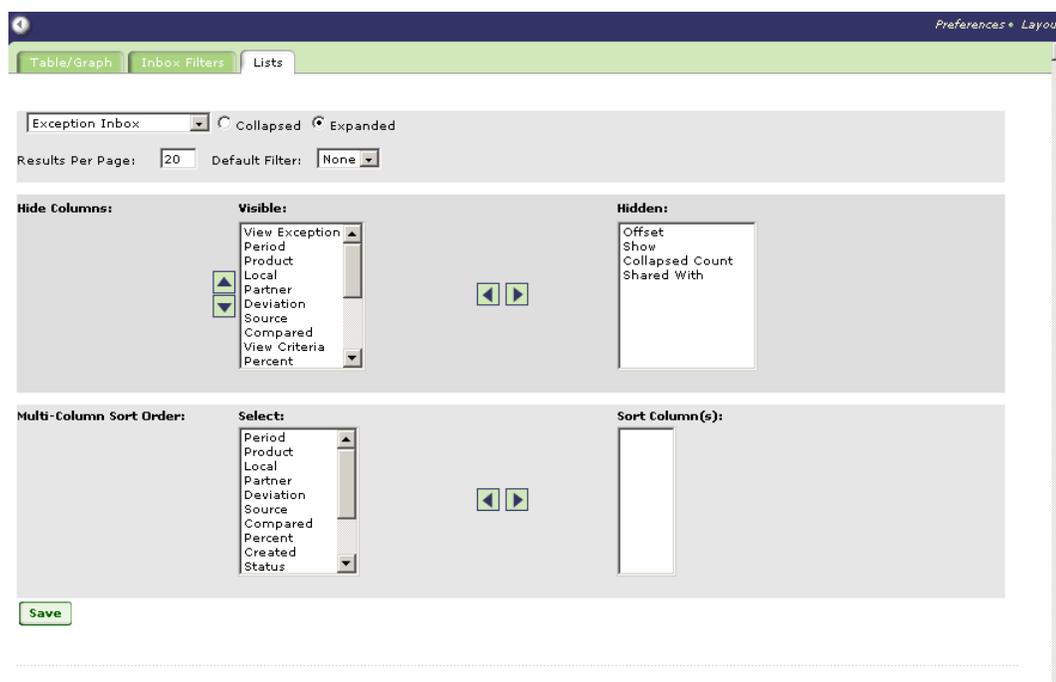
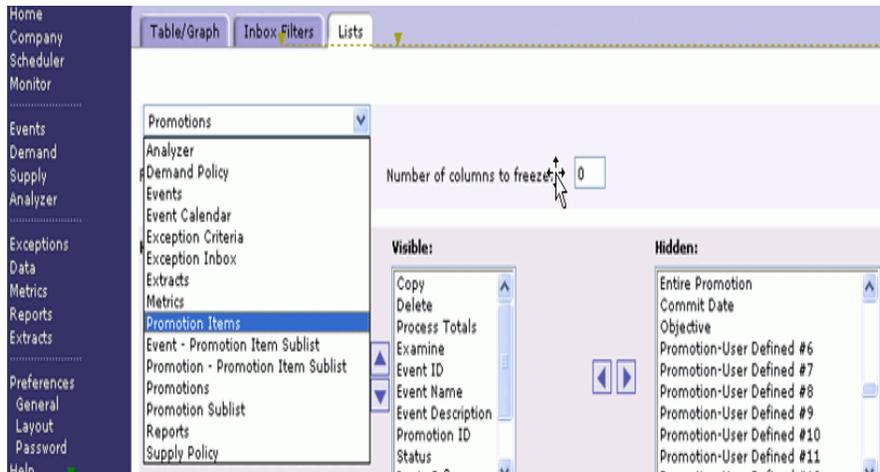


Figure 8-25: Preferences - Layout - Lists screen with the Period Configuration drop-down. This feature is only accessible to users who have daily time buckets rather than weekly.

Setting Preferences for the User Defined Fields

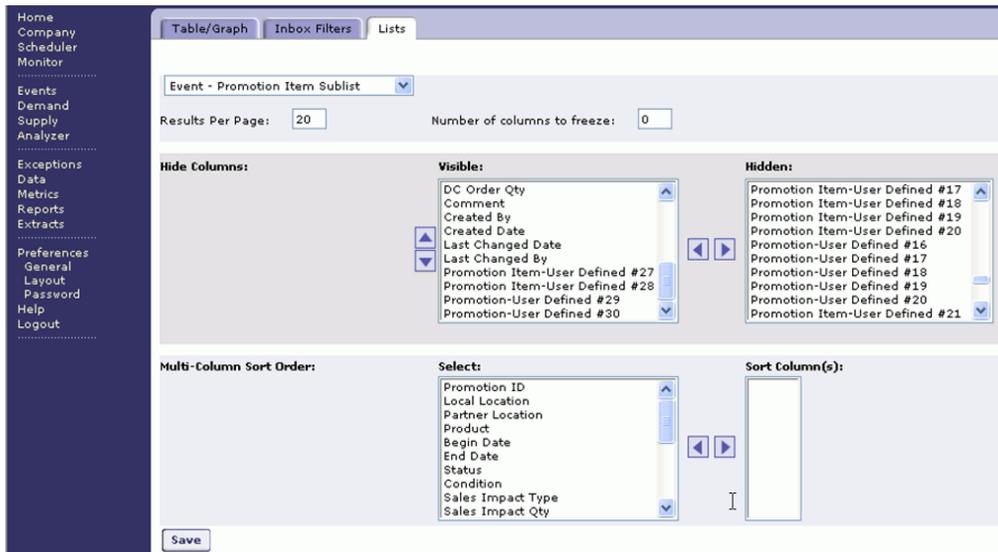
1. Click Preferences - Layout - Lists. Select Promotion Items, Event - Promotion Item Sublist, Promotion - Promotion Item Sublist, Promotions, promotion Sublist from the drop-down list. The appropriate **Preferences** screen appears.

Figure 9–26 Accessing Preferences for UDFs



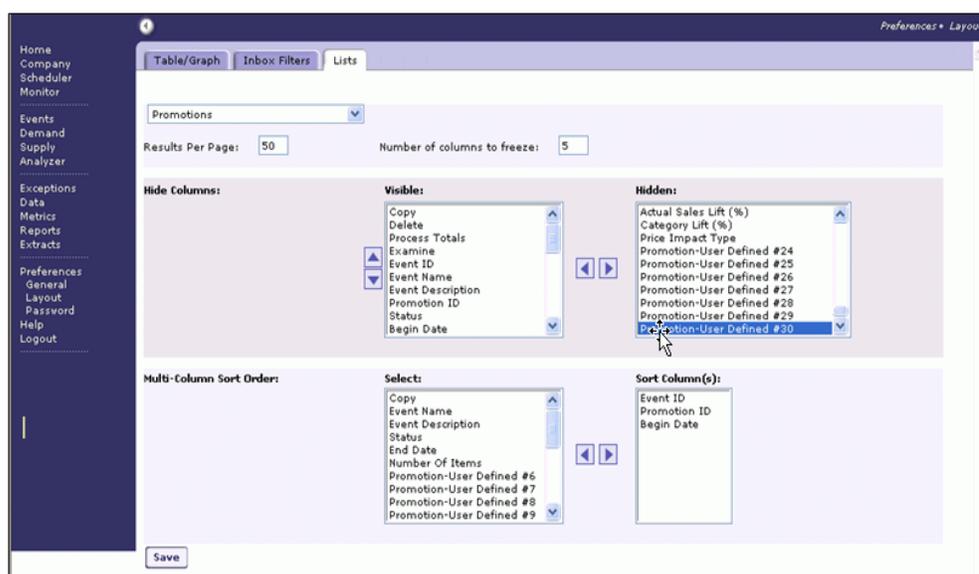
2. The above graphic displays the Preferences List screen options.

Figure 9–27 Setting the UDFs as Visible



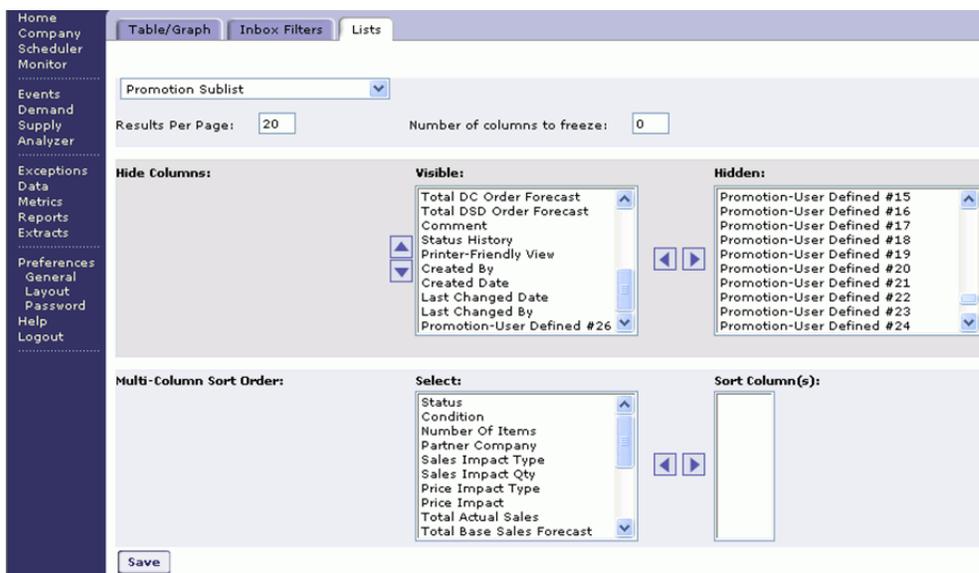
3. Move the desired UDFs to the Visible section. This will allow the user to view the UDFs on the appropriate List screens.
4. Enter the number of results to be displayed by page.
5. Enter the number of columns to freeze.
6. Select the **Save** button to save the changes you have made.

Figure 9–28 Setting the UDFs as Hidden



- To hide the UDFs, move the fields to the Hidden section. The above graphic displays hidden UDF fields.

Figure 9–29 Setting Preferences for the Promotion sublist



- Use the arrow buttons to order or hide columns.

To order the columns: Scroll up or down the list of Visible columns and select the column you want to move. Click the "up" or "down" arrows to move the selected column to the Visible list. Each click moves the column one position. When saved, the order you choose will be how the columns appear.

To hide a column: Scroll up or down the list of Visible columns and select the column you want to hide. Click the "right" arrow to add the selected column

to the Hidden list. When saved, the columns you moved to the Hidden list will not appear in the list.

To show a column that is hidden: Scroll up or down the list of Hidden columns and select the column you want to show. Click the "left" arrow to add the selected column to the Visible list. When saved, the columns you moved to the Visible list will appear in the list.

9. Use the arrow buttons to set the Multi-Column Sort Order.

To add a column to the Multi-Column Sort Order list: Scroll up or down the list of column(s) on the right and select the column you want to sort. Click the "right" arrow to add the selected column(s) to the multi-column sort list. You can add as many columns as you wish. When saved, items in the list will be sorted automatically by the column(s) you selected.

To remove a column from the Multi-Column Sort Order list: Scroll up or down the list of Hidden columns and select the column(s) you want to remove. Click the "left" arrow to move the selected column to the Available list. When saved, items will not be sorted automatically by the column you removed.

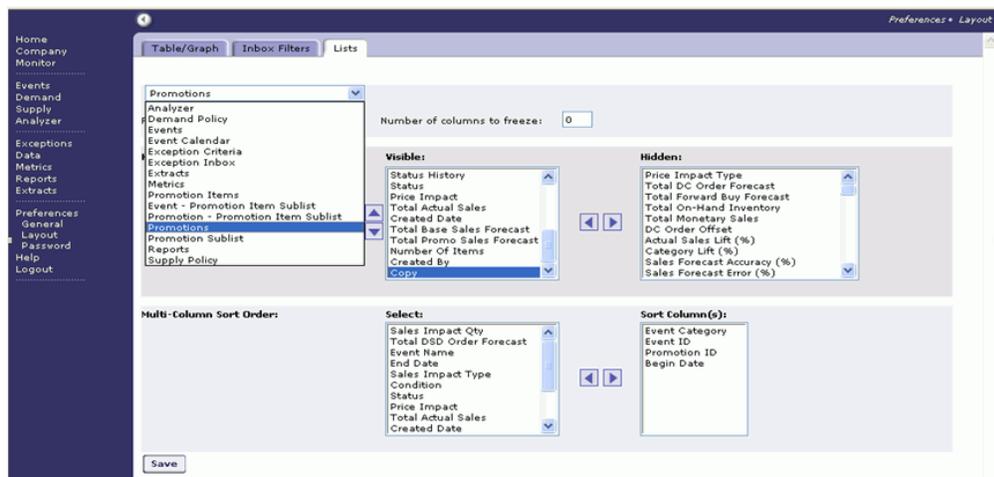
10. Click Save.

Setting Preferences for Copy Promotions

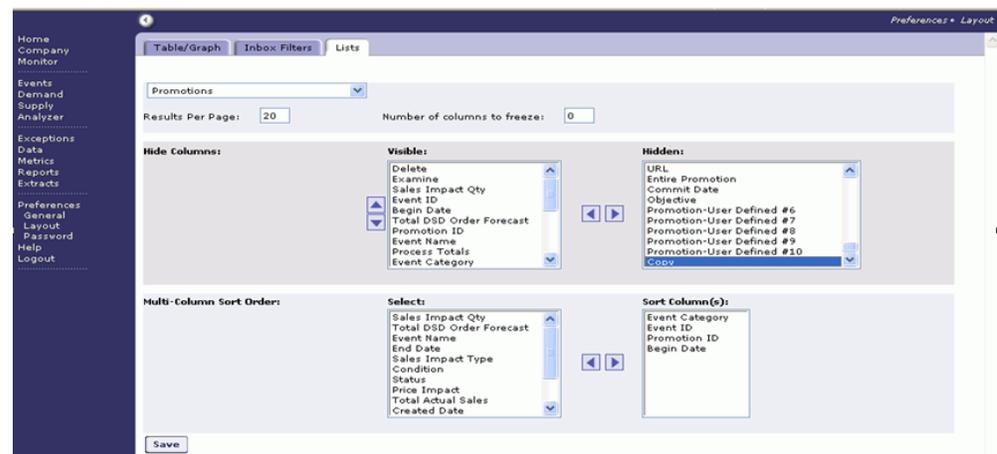
This functionality allows the user to copy a Promotion from one event to another existing event. Validation of the source promotion and target event will occur to successfully execute the copy promotion process.

1. The Copy field is configurable like all other fields in the Promotions List screen. Configurability is set in the Preferences - Layout options.
2. Select the **Preferences - Layout - Lists** tab. Move the "Copy" field to the Visible section. The "Copy" field and copy promotion functionality will then be accessible through the Promotions List screen.

Figure 9–30 Setting preferences for the "Copy" field in the Promotions List screen



3. To hide the "Copy" field, move it to the Hidden section. The graphic below displays the hidden "Copy" field.

Figure 9–31 Setting the "Copy" field preference to Hidden

4. Use the arrow buttons to order or hide the columns.

To order the columns: Scroll up or down the list of Visible columns and select the column you want to move. Click the "up" or "down" arrows to move the selected column to the Visible list. Each click moves the column one position. When saved, the order you choose will be how the columns appear.

To hide a column: Scroll up or down the list of Visible columns and select the column you want to hide. Click the "right" arrow to add the selected column to the Hidden list. When saved, the columns you moved to the Hidden list will not appear in the list.

To show a column that is hidden: Scroll up or down the list of Hidden columns and select the column you want to show. Click the "left" arrow to add the selected column to the Visible list. When saved, the columns you moved to the Visible list will appear in the list.

5. Use the arrow buttons to set the Multi-Column Sort Order.

To add a column to the Multi-Column Sort Order list: Scroll up or down the list of column(s) on the right and select the column you want to sort. Click the "right" arrow to add the selected column(s) to the multi-column sort list. You can add as many columns as you wish. When saved, items in the list will be sorted automatically by the column(s) you selected.

To remove a column from the Multi-Column Sort Order list: Scroll up or down the list of Hidden columns and select the column(s) you want to remove. Click the "left" arrow to move the selected column to the Available list. When saved, items will not be sorted automatically by the column you removed.

6. Click Save.

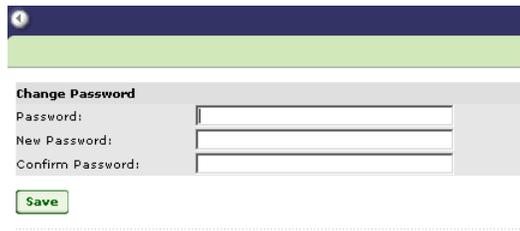
Changing Your Password

The **Password** feature allows you to change your password for Oracle Retail VCC.

To change your password

1. Select **Preferences - Password**. The **Change Password** screen appears.

Figure 9–32 *Change Password Screen*



The screenshot shows a web interface for changing a password. It features a dark blue header bar with a home icon on the left and a light green bar below it. The main content area has a grey background and is titled "Change Password". Below the title are three text input fields: "Password:", "New Password:", and "Confirm Password:". Each field is followed by a small grey box, likely for password strength indicators. At the bottom of the form is a green "Save" button.

2. Enter your current password in the **Password:** text box (40 alphanumeric character limit).

Note: Quotation marks and apostrophes are valid alphanumeric characters for all password fields.

3. Enter your new password in the **New Password:** text box.
4. Reenter your new password in the **Confirm Password:** text box.
5. Click **Save**

Part II

Value Chain Collaboration Modules

The following modules are separately priced options, and access to them as menu items will only appear if you have obtained a license for each.

Part II contains the following chapters:

- [Events](#)
- [Demand](#)
- [An Analyzer](#)
- [Supply](#)

This chapter contains the following topics:

- [Introduction](#)
- [Events](#)
- [Promotions](#)
- [Promotion Items](#)
- [Documents](#)
- [Promotion Status Changes](#)
- [Copy Promotions](#)
- [Viewing the User Defined Fields](#)

Note: The Events module is a separately priced option, and access to it as a menu Item will only appear if you have obtained an Events license.

Introduction

The Event Collaboration module provides visibility and collaboration on Promotions. Promotions are sale occurrences such as introductory offers, seasonal sales, etc. They contain attributes, have a status, and can also contain multiple tactics and Items. Items within a Promotion occur at the collaboration-Item level.

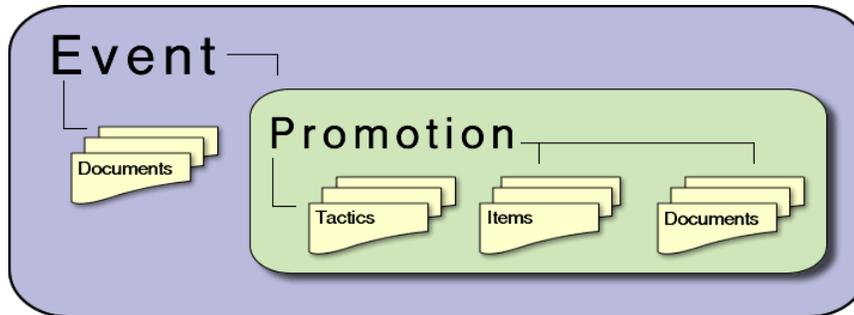
The Events module allows you to:

- Create an Event from scratch, or by copying a previous Event
- Add and remove Products/Locations for the Promotion
- Attach Documents to the Event
- Download Documents attached to the Event
- Change the Promotion Status
- Apply sales and order volume estimates and pricing
- Report on the actual performance of the Promotion vs. plans for it

A Promotion has a status and attributes, and contain tactics (something that contributes to the event, like an ad or a display) and Items (collaboration Items that are included in the Promotion). The tactics and Items also have their own attributes. Some Item attributes are initially populated from the corresponding Promotion attributes.

Although Items within an event occur at the collaboration-Item level, Promotions themselves exist independent of context because many different Items may be tied-in to the same Promotion. For instance, you could have a Holiday Clearance Sale that included both candy and toys. These Items would share the same Promotion (Holiday Clearance Sale), but could exist at different contexts because you may have different partners associated with different Items (candy and toys). Therefore, in order to view all the Items relevant to a particular Promotion, you would need to select a folder-level partner in the Context Chooser when viewing a specific Promotion.

Figure 10–1 Events and Promotions



Note: When selecting from the Partner tree, you may not select a folder that contains locations from more than one company. Attempting to do so will prompt the VCC to display an error message.

Events

The Events - Overview is comprised of three tabbed views:

- [Events Calendar Tab](#)
- [Events List Tab](#)
- [Events Create Tab](#)

Note: Before editing an Event that has been loaded in an Edit Operation using the Integrator, check the Monitor - Job screen to verify that the job is complete before allowing a user to edit the Event. This will avoid creating any data discrepancy.

Check the Monitor - jobs screen to see if the jobs corresponding to that event is completed and then allow the user for editing.

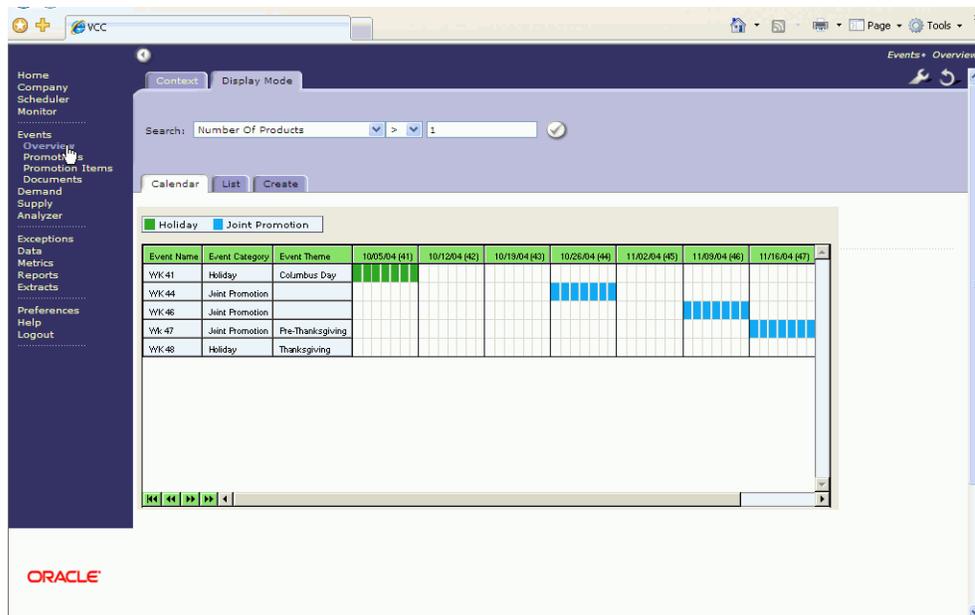
Events Calendar Tab

The Events - Calendar screen provides a calendar view of the Events you have created. The calendar is useful in viewing where Events overlap, and for providing a visual overview of where they begin and end. The calendar also allows you to drill down within each date that contains one or more Promotions in order to view or edit the details of that Promotion.

To edit Events in the calendar:

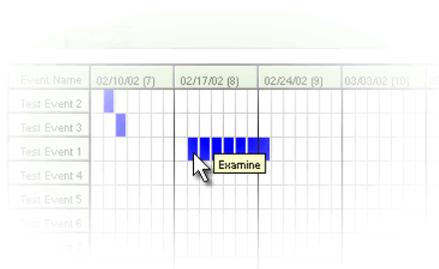
1. Select Events - Overview - Calendar tab. The Events calendar appears. If today's date is included in the range of existing Events, the calendar will open to the current date.

Figure 10–2 Events Calendar



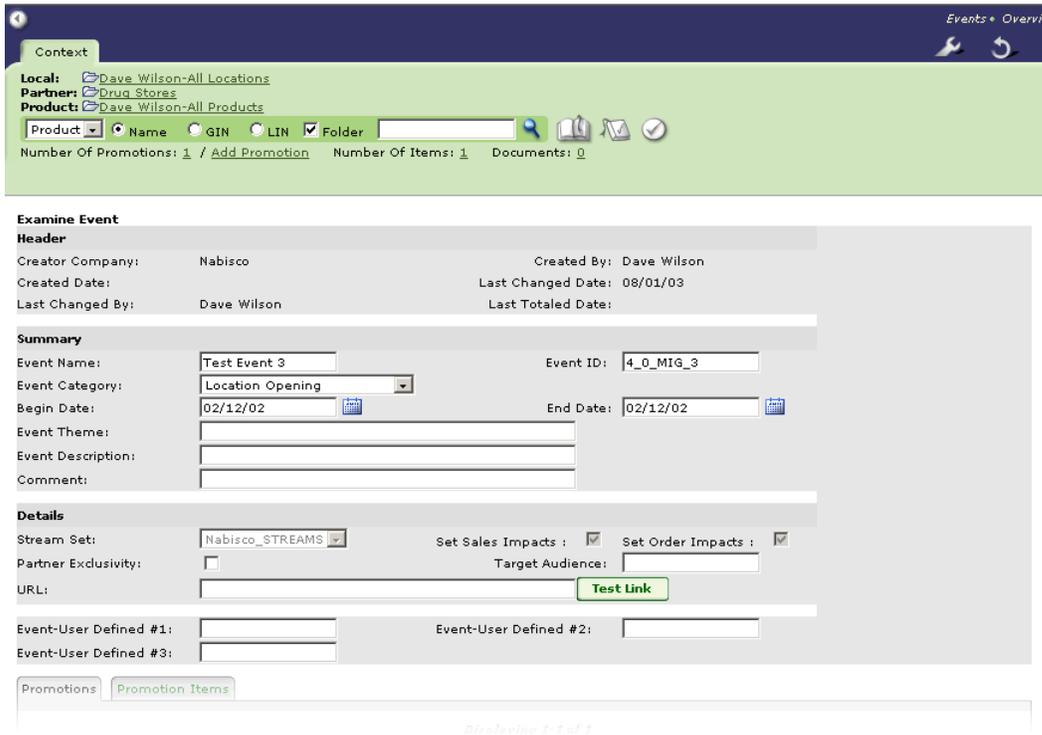
- Clicking in the 'Event ID' and 'Event Name' lists on the left of the calendar will display the first activity planned for the Event name/ID you selected.
2. Click the colored cell for the Event you wish to view. The colors are determined by the 'Event Category', and are configurable by your company administrator.

Figure 10–3 Colored Cells in the Events Calendar



3. The Examine Event screen appears.

Figure 10–4 Examine Event Screen

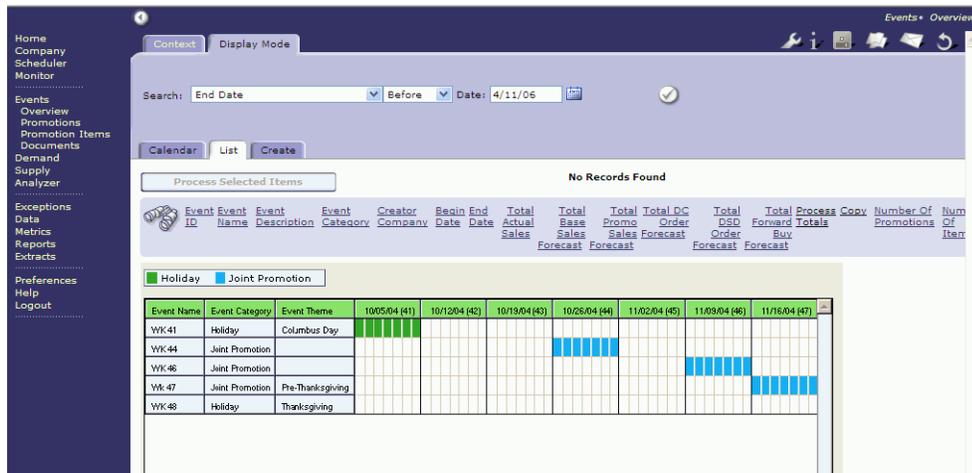


- If you modify the Event, click Save. If you have viewed the Event and wish to return to the calendar without editing, click Cancel.

Events List Tab

Select Events - Overview - List tab. The Events List appears. It contains the following columns:

Figure 10–5 Events List



- Examine – drilldown dot provides a more detailed view of the selected Event.
- Event ID – the ID assigned to the Event.

- Event Name – name of the Event.
- Event Description – optional description entered for the Event.
- Event Category – category the Event belongs to. Category indicates the reason for planning the Event (i.e., Holiday, Price Change, Retailer Promotion, etc.).
- Creator Company – company that created the Event.
- Begin Date – date the Event will begin.
- End Date – date the Event will end.
- Copy – duplicate this Event.
- Number Of Promotions – number of Promotions contained in this Event.
- Number Of Items – total number of Items contained in the Event Promotions
- View/Edit Comment – clicking the drilldown dot enables you to view and edit comments. Grey dots indicate there is not yet a comment created for the Event.
- Delete – allows you to delete Events by checking the check box and then clicking the **'Process Selected Items'** button.
- Printer-Friendly View – view data in format that is suitable for printing.
- Created By - name of user who created the Event.
- Created Date — date the Event was created.
- Last Changed Date — date the Event was last modified.
- Last Changed By — name of user who last updated this Event.
- Number Of Locations — number of locations included in the Event.
- Number Of Partners — number of partners involved in the Event.
- Number Of Products — number of products affected by the Event
- URL — website where Event details can be viewed.
- Set Sales Impacts — Yes or No will be displayed depending on whether or not sales impacts have been set for this Event
- Set Order Impacts — Yes or No will display, depending on whether or not order impacts have been set for this Event.
- Stream Set — stream set used by the Event.
- Last Totaled Date — date data was last totaled.
- Event Theme — Additional descriptive field.
- Target Audience — Event's target audience
- Event - User Defined — One to three custom fields that are company specific.
- Partner Exclusivity — Indicates whether promotion is shared exclusively with one partner company. If selected, the partner added in the first promotion is the only partner allowed for the event.
- Total Crossdock Order Forecast — Allows for total order computation. Computed results display in the Promotion Item - Examine screen. Totals all four order values (DC orders, DSD orders, Crossdock orders and Forward Buy) minus the pre-ordered quantity.

Event Data displayed in the List includes:

- Total Actual Sales
- Total Base Sales Forecast
- Total Promo Sales Forecast
- Total DC Order Forecast
- Total DSD Order Forecast
- Total Forward Buy Forecast
- Process Totals
- Total On-Hand Inventory
- Total Monetary Sales

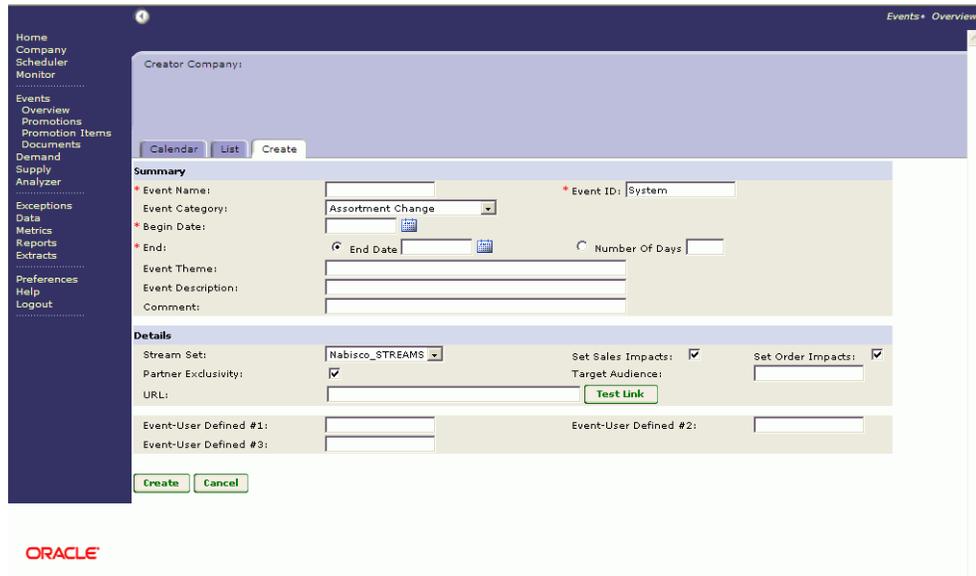
Events Create Tab

An Event must be created before any Promotions, Items, or Documents can be associated with it.

To create an Event:

1. Select Event - Overview - Create. The Create screen appears as shown below:

Figure 10–6 Create Screen



2. Assign a Name to your Event.
3. The Event forms are populated without any predetermined value. This implies that the default value is taken as <space>. As the field is mandatory, the user is compelled to enter the valid event/promotion id.a specific Event ID in the box.
4. Select the Category to include the Event in.
5. Enter the Begin Date, and select when you would like the Event to terminate. The End can be a specific date, or a set Number of Days from the Begin Date you establish.

6. Enter an Event Description, Comment. These fields are optional.
7. Enter the final creation Details by selecting your Stream Set from the drop-down, and checking or unchecking the Impact boxes.
8. If you wish the promotion to be shared only with one partner company, check the Partner Exclusivity check box.
9. Enter a Target Audience (optional), and provide a URL if so desired. Be sure to test any link you provide.
10. Click Create.

Once you have created the Event, you will be directed to the Examine Event screen. This is where you can add Promotions and attach Documents to the new Event. For more information on performing these tasks, see [Adding Promotions](#) and [Attaching Documents to Events and Promotions](#).

Copying an Event

In order to save time, Events can be duplicated to create similar Events. This can be easily done with the Copy icon.

Any Event that appears in the Event - List screen can be copied, and that copy can be modified.

To copy an Event:

1. Select a context.
2. Select Event - List. The List screen appears.
3. Click the copy icon under the Copy column for the Event that you wish to duplicate. The Copy Event screen appears.

Figure 10–7 Copy Event Screen

The screenshot shows the 'Copy Event' screen. At the top, there is a header with 'Events Overview'. Below the header is a green box containing the following information:

- Creator Company: Nabisco
- Last Changed By: Dave Wilson
- Last Changed Date: 10/21/03
- Number Of Promotions: 1
- Number Of Items: 1

Below the green box is the 'Copy Event' form. The form has the following fields and controls:

- Event Name: [Text Input Field]
- Event ID: [Text Input Field containing 'System']
- System Generated Item IDs
- Item ID Prefix: [Text Input Field containing 'Copy of']
- Begin Date: [Date Picker]
- Number Of Days: [Text Input Field]
- End Date: [Date Picker]
- Buttons: [Create] [Cancel]

4. Enter a new name in the Name field, verify Begin Date, and select either the Number of Periods you wish the Event to span, or a specific End Date. If you do not specify an Event ID, the system will provide one for you.
5. Click Create to proceed. The Examine Event screen appears.

6. All of the fields that were filled from the original Event will appear with the same information in the copy. Modify the Event, its Items, and Tactics. For more information on adding and configuring Items, see [Creating Promotion Items](#).

Note: If the dates applied to the original Event do not relate directly to the new copy, some Items may not be included in the copied event. For instance, if the original Event span is 12/16 - 12/22, with Items that begin on dates 12/17, 12/19, 12/21, and the copy specifies a span from 12/16 - 12/18, then the copied Event would only include the first Item.

Promotions

This section details on the following topics:

- [About Promotion Attributes](#)
- [About Promotional Tactics](#)
- [Viewing Promotions](#)
- [Viewing the User Defined Fields](#)
- [Adding Promotions](#)
- [Deleting Promotions](#)
- [Copy Promotions](#)

During the Promotion creation process, you will define the Promotion with specific data such as which partner company you will share the Promotion with, a brief description of the Promotion, how long it should run, which sale category the Promotion falls under (a holiday sale, a regular Promotion, etc.), how much the Promotion will affect the original price of the Item, etc

About Promotion Attributes

The above mentioned terms or descriptors are called Attributes. After you have created a Promotional event, many of its attributes will be visible in the Events - Promotions screen.

The Promotion is also given a Status attribute, which is tracked. This helps determine what stage the Promotion has reached in its life cycle. The behavior of the Promotion changes as its status changes. For more information on Promotion statuses and changing them, see [Changing the Status of a Promotion](#). Promotions can also have external (unique per creator company) IDs which can be used as keys to synchronize events with external system(s).

About Promotional Tactics

A Tactic categorizes the type of Promotion being planned. Examples of tactics are ads, coupons, and rebates. A Promotion may contain no tactic, a single tactic, or multiple tactics.

Tactic attributes enable you to provide more detail on each tactic. They can be accessed and configured at the bottom of the Events - Promotions create and edit screens.

The Tactics section includes options for the following:

- Category

- Tactic
- Value
- Unit-Of-Measure
- Comment
- Begin and End Date

If you are viewing a partner's promotion, and there are no comments in the tactics section, the tactics comment icon will not be clickable.

The Tactics Category drop-down contains the following classifications:

- Ad
- Display
- Consumer Incentive
- Assortment Change
- Location Change
- Packaging
- Trade Funds
- Other

Each Category has its own set of tactics attributes. These attributes further describe the tactic, with the exception of 'Other' and 'Trade Funds'. These two categories only have a Value, Unit-Of-Measure, Begin and End Date, and Comment option when they are selected. Selecting any other tactics from the drop-down will produce a new list that appears in the next drop-down immediately to its right (i.e., when a selection is made in the Category column, the Tactic column becomes active with the appropriate choices). All categories includes a numeric Value, text UOM, Begin Date, End Date, and a text Comment can be entered for every activity. Comments can be up to 255 characters.

The table below shows a list of all the available options that can be selected for a tactic. The Value, Unit-Of-Measure, and Comment fields are always available for each category, regardless of what is selected in the drop-downs.

Table 10–1 Promotion Tactics

Category	Tactic
Ad	Billboard
	Direct Mail Ad
	Direct Mail Blow-In
	Flyer
	Free-Standing Insert
	Handbill
	Internet Ad
	Line Ad
	Magazine Ad
	Mobile Ad
	Newspaper Ad
	Radio Ad
	Retail Circular
	Shelf Talker
	Television Ad
Display	Display (general)
	Dump Bin Display
	End Cap Display
	Floor Stack Display
	In-Store Dispenser
	Module Display
	On-Counter Display
	Rack Display
	Shelf-Extender Display
	Shipper Display
	Transparency
	Temporary Outpost

Table 10–1 (Cont.) Promotion Tactics

Category	Tactic
Consumer Incentive	BOGO/Buy x Get y
	Coupon
	Coupon Book
	Free Item
	Gift with Purchase
	Instant Rebate
	In-Store Sample/Demo
	Mail-In Rebate
	Mailed Samples
	Major Event
	Membership Card
	No Price Change
	Purchase with Purchase
	Other Consumer Incentive
	Scan
	Special EDLP Event
Sweepstakes	
Temporary Price Reduction	
Assortment Change	Product Introduction
	Product Retirement
Location Change	Add Locations
	Drop Locations
Packaging	Bonus Pack
	Co-Branded Item
	In-Pack Item
	Near-Pack Item
	On-Pack Item
Pre-Priced Item	
Trade Funds	N/A
Other	N/A

Additional Categories and Tactics can be added or modified using the Tactics creator. Contact a Oracle Tech Support Executive for more details on adding and modifying Categories and Tactics.

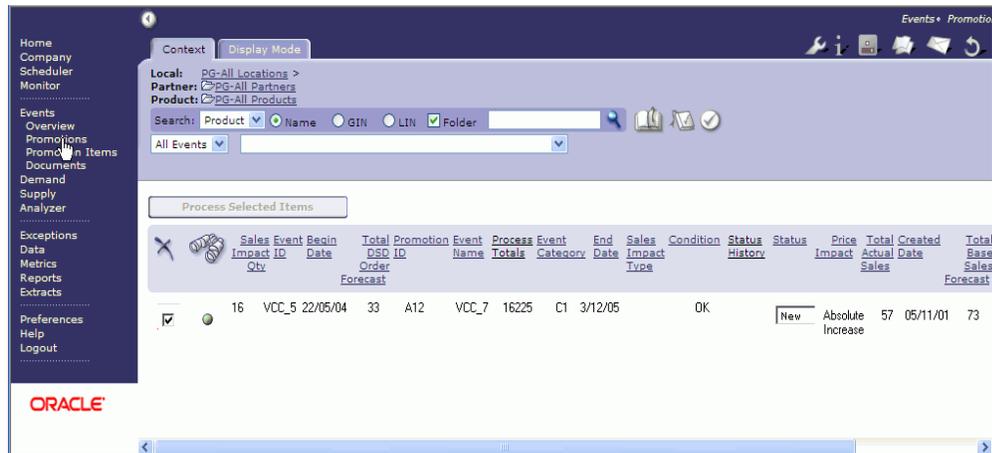
Viewing Promotions

There are three ways in which you can view a list of Promotions:

- A list of Promotions can be access through the VCC menu by selecting **Events - Promotions**. This list will display Promotions regardless of the Event they were created for. The Events - Promotions list is context-specific.
- Any Promotions that exist for an Event can be viewed from within **Events - Overview**. By drilling down to examine the Event, you will see a tabbed view of

both Promotions and Promotion Items that exist for the selected Event. This is useful for finding out which Promotions or Items exist specific to an Event

Figure 10–8 Events - Promotions List



- Similarly, Promotions can be viewed by accessing the **Examine Events** screen, where a 'Number of Promotions' link exists in the Context Chooser area. This number is clickable, and will display a list of Promotions for that Event.

Figure 10–9 'Number of Promotions' Link in the Context Chooser Area



The **Events - Promotions** screen displays the list of attributes and tactics that define each Promotion. In addition to displaying read-only information, this screen also allows you to:

- view a Promotions's history
- delete Promotions
- change the status of a Promotion
- view and add/edit comments for each Promotion
- view/edit the number of Items in each Promotion
- visit a link for each Promotion
- process totals

The initial list view will show the default column option selections and order. You can change the columns that display in the Events - Promotions - List screen by revising selection options in the **Preferences - Layout - Lists - Promotions** screen by selecting the 'Configure List' icon, or by going to the Preferences - General - Layout screen directly. For more information on configuring Lists, see [Setting List Screen Preferences](#).

Promotions List

The Event - Promotions list screen contains many of the same columns that the Event List contains, which can also be applied to the Promotion level. For more details on columns not included in the list below, see column descriptions in the 'Events List Tab'. The following column options and actions are unique to the Promotion List:

Figure 10–10 Columns in the Events - Promotions Tab



- Promotion Category — category the Promotion has been assigned to.
- Partner Company — partner company who is collaborating on the Promotion
- Status — dropdown displays the status of the Promotion. Includes 'Proposed' and 'Cancelled' options.
- Condition — 'OK' displays when Promotion condition is okay
- Status History — Displays a list status modifications that were made to the Promotion, and their dates
- Planned By — name of user who planned the Promotion
- Entire Promotion – yes or no value will display in this column, indicating that the Sales Impact Qty is to be distributed among Items for the entire Promotion period. (Available when Sales Impact Type = Absolute Increase, Absolute Decrease, or Set Value To.) When selecting to disaggregate type and quantity among the entire Promotion, the following rules apply:
 - The new equally distributed Sales Impact Value will apply to all Promotion Items, whether or not they had been previously overridden at the Item level.
 - If there are no Items for this Promotion, the Sales Impact for all Items that are added will be the Sales Impact of the Promotion, equally divided among all the Items. If there are one or more Items for a given Promotion, the Sales Impact for all Items being added will be 0.

Note: If you create an Event with 'Entire Promotion' selected, and later add, edit, or remove Promotion Items, the Promotion's Sales Impact Value will not be automatically readjusted. This may result in some numbers to being out of sync.

Note: After Processing Totals, two kinds of fields will display as empty: (1) Each Stream Set data type that has not been selected to 'Enable Totals' (2) Each Stream Set data type that has null values in the Event date range.

Note: Totals displayed in the Event are the sum of the current value of all items in the Event.

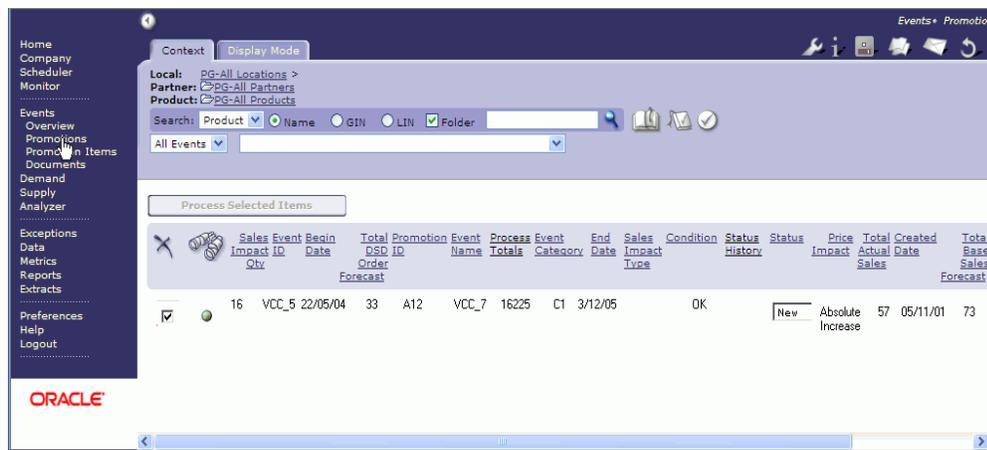
- First Ship Date — first available date product can be shipped.

- Planned Date — date Promotion is planned.
- Proposed Due Date — due date proposed for Promotion.
- Planned Due Date — due date planned for Promotion.
- Partner Promotion ID — collaboration partners ID assigned to the Promotion.
- E-Mail Notification — e-mail addresses of to be sent notification of promotion.
- E-Mail Language — language to be used in e-mail notification.

To View a Promotion:

1. Select your context.
2. Select Events - Promotions - Display, the screen appears as shown below.

Figure 10–11 Events - Promotion Screen



From the Events - Promotions - Display screen, you can view the history of each Promotion.

To View a Promotion's History:

1. Click the colored dot under the Examine History column. The screen that appears will tell you when the Promotion was last modified, the user who modified it, the prior status, and the current or new status.

Figure 10–12 Promotion History



2. Click **Back** to return to the Promotions screen.

You can view and add or edit comments for your Promotion. The Comments are for each event are located under the dialogue bubble icon. Each event will have a white dot if there is no comment. You can click this dot and add a comment; the dot will then change color to indicate it now holds a comment. A comment can be up to 255

characters for each event. Comments can be added, overwritten, and deleted on the Comment screen only.

To add a comment to a Promotion:

1. Select your context.
2. Select the **Events - Promotions - List** screen
3. Click the dot that appears under the **comments icon**. The comment screen appears.
4. Enter your comment in the **Comment** field provided.

Figure 10–13 Events - Promotions - Comment Screen

Author	Comment
Your Comment:	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>
<input type="button" value="Post"/> <input type="button" value="Done"/>	

5. Click **Post** to save your comment, or **Done** to quit without saving and return to the **Events - Promotions** screen.

To access a printer-friendly version of the Promotion you are interested in printing, click the appropriate blue drilldown dot under the Printer Friendly icon. This will display the **Printer-Friendly view** of the Promotion.

Figure 10–14 Printer-friendly View of the Promotion

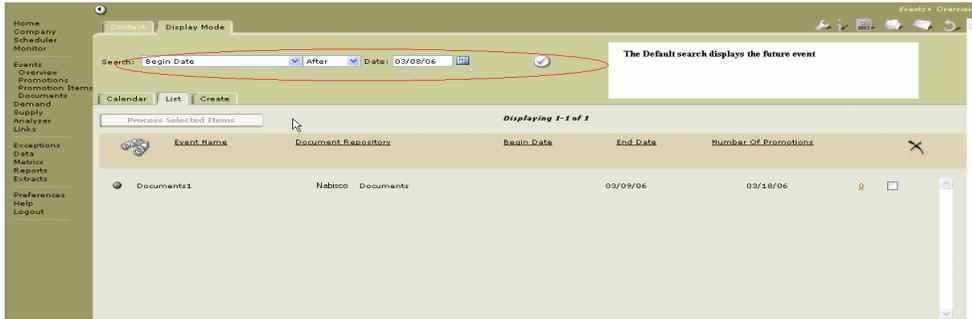
Creator:	Nabisco		
Last Change By:	Dave Wilson		
Last Change Date:	01/13/03 13:59:54		
Number of Locations:	1		
Number of Items:	9		
Promotion			
Name:	test	Promotion Status: Proposed	Promotion ID: VCC 11
Description:	sdfsdf		
Partner Company:	Speedy Rx	Promotion Category: Holiday	
Begin Date:	01/10/03	End Date: 01/15/03	
		Stream Set: fg	
Price Impact Type:	Absolute Decrease	Price Impact Qty: 1,212.00	
Sales Impact Type:	Absolute Increase	Sales Impact Qty: 1,212.00	Entire Promotion: No
URL:			
E-mail Notification:			
E-mail Language:	American English		
Tactics			
No Tactics created.			
<input type="button" value="Print"/> <input type="button" value="Back"/>			

You can then click **Print** to send your data to the printer, or **Back** to return to the List view.

To View a Promotion's Default Screen:

The screen below shows the default view with future events/promotions.

Figure 10–15 Promotions Default Screen



Changing the Status of a Promotion

Promotions have a status. Status can be changed manually or automatically. Any change of status automatically updates the 'last changed by' field to the user who changed the status. The following are the various status states:

Promotions are non-editable by the creator company when the status of the promotion is 'Planned'.

- New – Promotion is in creation process, only visible to creator company, and does not impact promo forecast. All possible changes are allowed.
- Proposed – Effect of Promotion is reflected in the creator's promo forecast stream. Promotion is made visible to partner with status of 'awaiting approval', but does not impact partner forecast stream.
- Planned – Effect of Promotion applied to partner forecast stream.
- Modified – Modified effect of Promotion is reflected in the creator's promo forecast line. Modified Promotional event is made visible to partner, but does not change partner forecast until accepted.
- Change Request – A change is requested - no changes are made to either forecast line. User needs to enter a Promotion-level comment with the requested change.
- Rejected – Effect of Promotions zeroed-out from partner forecast.
- Cancelled – Effect of Promotion zeroed-out from local and partner forecast. No further changes are allowed.
- Completed – End date of an 'accepted' Promotion has passed. No further changes are allowed.
- Expired – End date of a Promotion other than 'accepted' or 'cancelled' has passed. No further changes are allowed.
- Planned Change Request – Once in 'Planned' status, promotions can be set to 'Planned Change Request' by the partner on request from the creator.
- Planned Modified – Creator can make changes, and then set the status to 'Planned Modified'. Partner then reviews the promotion, and then sets it to 'Planned' again.

- Proposed Acknowledged – (Partner)
- Modified Acknowledged – (Local)
- Active – (system)
- Terminated – (Local/Partner)
- Active Modified – (Local)

Note: User cannot edit promotion item detail when promotion is set to an 'acknowledged' status.

Only certain user-initiated changes in status state are allowed, as shown in the three tables below.

Table 10–2 Promotion Status Transitions and Ownership

Change Allowed From	Change To (By Creator)									
	Proposed	Proposed Acknowledged	Planned	Change Requested	Modified	Modified Acknowledged	Active Modified	Rejected	Cancelled	Terminated
New	v	v								
Proposed		v		v				v		
Proposed Acknowledged				v				v		
Planned				v				v		
Active				v		v				v
Change Requested				v						
Modified								v		
Modified Acknowledged				v				v		
Active Modified				v						v

Table 10–3 Promotion Status Transitions and Ownership

Change Allowed From	Change To (By Partner)									
	Proposed	Proposed Acknowledged	Planned	Change Requested	Modified	Modified Acknowledged	Active Modified	Rejected	Cancelled	Terminated
New										
Proposed	v	v	v				v			
Proposed Acknowledged		v	v				v			
Planned				v				v		
Active										v
Change Requested										
Modified				v	v		v			
Modified Acknowledged		v	v				v			
Active Modified										v

Table 10–4 Promotion Status Transitions and Ownership

Change From	Change To (By System)				
	Active	Active Modified	Completed	Expired	Modified
New			v		
Proposed			v	v	
Proposed Acknowledged			v	v	
Planned	v		v		v
Active		v	v		v
Change Requested					v
Modified			v	v	
Modified Acknowledged			v	v	v
Active Modified			v		v

Table 10-5 Promotion Status Transitions for a Planned Promotion

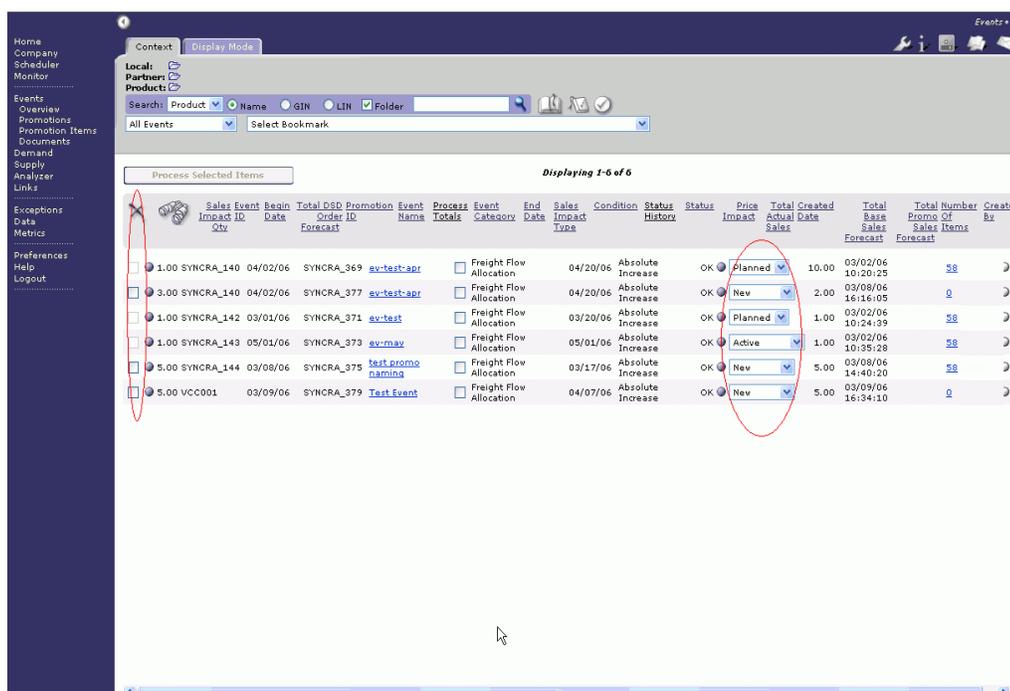
From Status	To Status	Transition Allowed by
Planned	Planned ChangeRequest	Partner
Planned ChangeRequest	Planned Modified	Creator
Planned Modified	Planned	Partner

When the creator company makes modifications to a planned promotion through the VCC Integrator/Loader, the promotion status sets to 'Planned Modified'.

To Delete/Change the Promotions Status

The circled content shows whether the partner can delete and change the promotion status. The delete check boxes are disabled and status change list contains only allowed transitions.

Figure 10-16 Delete/Modify Promotion Status

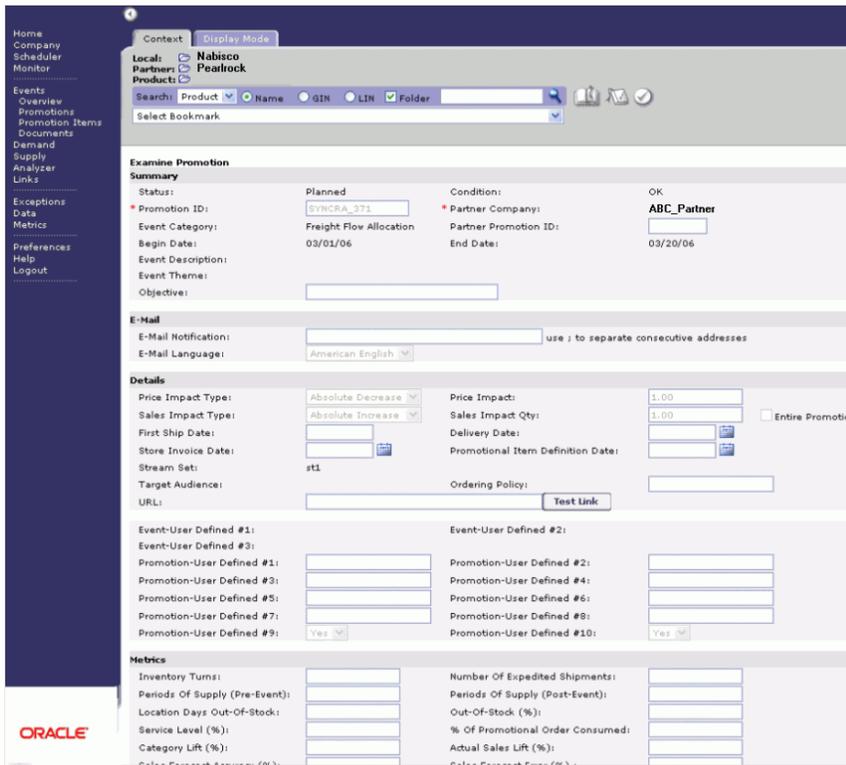


Promotions - Editability

In certain promotion status, the promotion/promotion item is not editable by one partner or both the partners. Thus, the content is grayed out as shown in the following screen view.

In creator editable promotions, promotions can be edited and promotion items can be added, deleted, or modified. In partner editable promotions, only comments can be edited at promotion level.

Figure 10–17 Edit Promotions



While accessing the events/promotion/promotion items screens for view/edit/delete, the UI view should meet the access control criteria as mentioned in Editability Rules in the Table below:

Table 10–6 Edit Rules for Promotion Work Flow

Status	Creator Editable	Partner Editable
New	Y	N
Proposed	Y	N
Planned	N	N
Modified	Y	N
Change_Req	N	Y
Rej	N	N
Cancelled	N	N
Complete	N	N
Expired	Y	N
Prop_Acknowledge	Y	N
Mod_Acknowledge	Y	N
Active	N	N
Terminated	N	N
Non_Local_Planned	Y	N

Table 10–6 (Cont.) Edit Rules for Promotion Work Flow

Status	Creator Editable	Partner Editable
Active_Modified	Y	N

The following general rules apply for the various status states:

- All Promotions are initially created as 'new'.
- The states of 'proposed', 'accepted', 'change requested', 'rejected' and 'cancelled' are all set manually, as per the above table.
- The status of 'modified' is automatically set whenever the Promotion creator saves modifications to an existing Promotion (other than 'new' Promotions, which remain 'new'). Promotion Items are also considered 'Modified' whenever Impact Type or Impact Value are changed.
- The status of 'completed' is automatically set when the end period of a 'accepted' Promotion has passed.
- The status of 'expired' is automatically set when the end period of a Promotion other than 'accepted' or 'cancelled' has passed.
- User cannot edit promotion item detail when promotion is in an 'acknowledged' status

Adding Promotions

It is only possible to add Promotions once an Event has been created, since each promotion is a subset of an Event. Promotions are added to Events through the Events - Overview - Examine Event screen. Creation of promotions can be done immediately after Event creation, or added later by examining the Event you wish to add Promotions to.

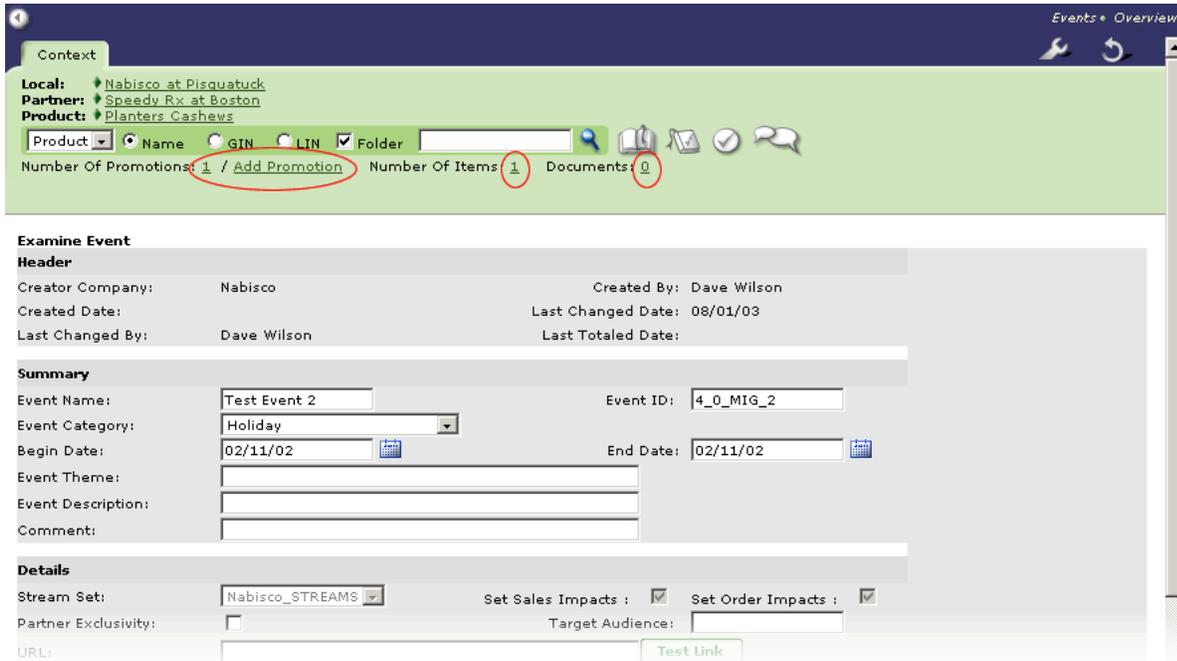
Promotions can be created for any leaf or folder level context. To create an Event, you must first have an available stream set selected. For more information on creating a stream set, see [Mass Entry of Data](#).

Note: If a message displaying 'No stream sets exist. Please create a stream set' appears at the Events - Promotions - Create screen, you must first create a stream set. Event stream sets can be configured by the superuser or server admin in Company - Module Config - Events - Stream Set Configuration.

To create a Promotion:

1. Examine the Event for which you wish to create a Promotion. The Examine Event screen appears.

Figure 10-18 Examine Event Screen



2. The context chooser area on this screen gives you access to Items, Promotions, and Documents associated with this Event. If a Promotion has not been created, Items will not display. If Promotions already exist, the link after 'Number of Promotions' will indicate how many Promotions are attached to the Event at this time. By clicking 'Add Promotion', you can increase that number. Clicking on the numbered link will display the list of Promotions that exist for that Event. Click Add Promotion. The Create Promotion screen appears.

Figure 10–19 Create Promotion Screen

Event ID: 4_0_MIG_3
Event Name: Test Event 3
Event Description:
Creator Company: Nabisco

Summary

Status: Condition: N/A
Promotion ID: Partner Company:
Event Category: Holiday Partner Promotion ID:
Begin Date: 02/12/02 End Date: 02/12/02

E-Mail

E-Mail Notification: use ; to separate consecutive addresses
E-Mail Language:

Details

Price Impact Type: * Price Impact:
Sales Impact Type: * Sales Impact Qty: Entire Promotion
First Ship Date:
Stream Set: Nabisco_STREAMS
User Defined #1: User Defined #2:
URL:
Comment:

Due Dates

	Proposed	Planned	Active (Begin Date)	Completed (End Date)
Milestone Date:	<input type="text"/> <input type="button" value="Calendar"/>	<input type="text"/> <input type="button" value="Calendar"/>	02/12/02	02/12/02
Notification Offset:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3. Select either 'New' or 'Proposed' from the Promotion Status drop-down. New is the default status. For more details on Promotion status, see [Changing the Status of a Promotion](#).
4. Enter a Promotion ID. The Promotion forms are populated without any predetermined value ie. Default value as <space>, as seen in the screenshot above. As this field is mandatory, the user is compelled to enter a valid promotion id. This alphanumeric ID can be used as a key to synchronize the event with external systems. The ID is unique per creator company.
5. Select a Partner Company from the drop-down list of companies available to you. This is the partner location for which the Promotion is defined. It may be at leaf or folder-level, but if at folder-level, must contain only locations from a single company.
6. Enter a Partner Promotion ID, if desired.
7. Specify a list of E-mail Notification recipients (optional). Separate multiple entries with a semi-colon (;).
8. Select the E-mail Language that will be used when E-mail is sent.
9. In the Details section, a Price Impact and Sales Impact Qty must be entered. The default Price Impact Type is 'Absolute Decrease.' The Sales Impact Type defaults to 'Absolute Increase'. If you want the Impact entered to affect the Entire Promotion, check the check box.

Figure 10–20 Create Promotion Screen - Details Section

Note: Price and Sales Impacts both allow you to enter positive, negative, and fractional numbers.

10. Select a First Ship Date that will display the first available date product can be shipped (optional). You can also enter a Delivery Date, Store Invoice Date, and Promotional Item Definition Date, if desired.
11. Enter an Ordering Policy, if any.
12. Enter the URL associated with the new event (optional). This feature is useful if there is an online Promotion with a direct URL that displays the advertised product, etc. Be sure to test the link after pasting it in.
13. Enter a comment for the Promotion (optional).
14. Enter the Due Date information for the Promotion. Select Proposed and Planned Milestone Dates, and enter the number of days to offset notification.
15. Under Metrics, you can assign values to metrics you would like to use during the promotion (optional).

Figure 10–21 Create Promotion Screen - Metrics Section

16. Enter Milestone Dates and Notification Offset in the Due Dates section (optional).

Figure 10–22 Create Promotion Screen - Due Dates Section

17. If you wish to add tactics at this point, click the Add button in the Tactics section. If you do not want to create tactics at this time, click Create to create and return to the List screen, Cancel to return to the List screen without saving, or Create & Add Item to begin adding Items.

After clicking the Add button, the first Tactics row will appear. You can then add Tactics to the Promotion. For more information on Tactics, see [About Promotional Tactics](#).

To create and manage multiple Tactics:

- click the + sign to add each new row of Tactics
- click the - sign to remove any unwanted rows.

Select a Promotion Category from the drop-down (optional). This gives you the option of specifying a categorical reason for the Promotion. 'Holiday' is the default. Options include:

- Holiday
- Inventory Policy Change
- Jointly-Sponsored Retail Promotion
- Labor
- Location Closing
- Location Opening
- Manufacturer Promotion
- Other - Non-Promotional
- Other- Promotional
- Packaging/labeling change
- Price change
- Product Discontinuation
- Product Introduction
- Retailer Promotion
- Seasonal Promotion
- Store Closing Promotion
- Store Opening Promotion
- Store Format Change
- Test Market
- Weather

You can now save the Promotion you created by clicking Create, or Cancel to cancel the Promotion and return to the List. Click Create & Add Item to begin adding Items to the Promotion. For more instructions on how to add Promotion Items, see [Creating Promotion Items](#).

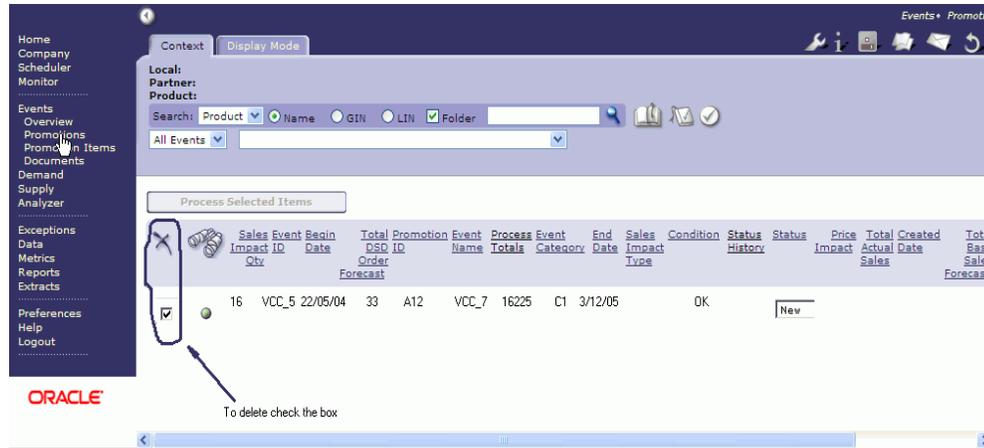
Deleting Promotions

Promotions can be deleted in the Promotions List views. To delete a promotion:

1. Select a context.
2. Access the Promotions List through the Oracle Retail VCC menu (Events - Promotions), or by drilling down to the Promotions List from an Event Examine screen.

3. Check the Promotions you wish to remove in the 'Delete' column.
Deleting a Promotion from the Events - Promotions screen is shown below:

Figure 10–23 Delete a Promotion from the Events - Promotions Screen



4. Check the check box under the Delete icon.
5. Click Process Selected Items.

Note: The Promotion Items list screen will continue to list Items even if the collaboration is removed or deleted for existing Promotion Items. You may wish to delete such Promotion Items. See [User and Role Permissions](#) for Permissions and Accessibility for deleting Promotions and Promotion Items.

Copy Promotions

This option allows the user to copy a Promotion from one event to another existing event . Validation of the source promotion and target event will occur to successfully execute the copy promotion process.

To copy a promotion:

1. Go to Events - Promotion. The screen appears as shown below:
2. Access the Promotions List through the Oracle Retail VCC menu (Events - Promotions), or by drilling down to the Promotions List from an Event Examine screen.
3. Promotion attributes include a configurable 'Copy' field. Click on the 'Copy' button associated with the desired source promotion.

Note: The user cannot sort by the 'Copy' field.

Figure 10–24 Promotions List with the new Copy field and buttons

Total DSD ID	Promotion Name	Process	Event	End Date	Sales Impact	Condition	Status	Price	Total Created	Total Base Sales	Total Number	Created Copy
06 1234	Test1234	<input type="checkbox"/>	Assortment Change	09/21/06	Absolute Increase	Absolute Increase	Late	Modified	135.00	09/14/06 05:30:00	159	mybuy
06	SYNCRA_95 Chalo123	<input type="checkbox"/>	Assortment Change	11/16/06	Absolute Increase	Absolute Increase	Late	New	135.00	10/18/06 05:30:00	159	mybuy
06	SYNCRA_87 mada	<input type="checkbox"/>	Assortment Change	10/20/06	Absolute Increase	Absolute Increase	OK	New	135.00	10/11/06 05:30:00	159	mybuy
06	SYNCRA_97 mysell	<input type="checkbox"/>	Assortment Change	11/28/06	Absolute Increase	Absolute Increase	OK	New	135.00	11/22/06 05:30:00	159	mybuy
06	SYNCRA_13 test12345	<input type="checkbox"/>	Assortment Change	09/29/06	Absolute Increase	Absolute Increase	OK	Change Request	135.00	09/14/06 05:30:00	160	mybuy
06	SYNCRA_57 kb12	<input type="checkbox"/>	Manufacturer Promotion	10/20/06	Absolute Increase	Absolute Increase	OK	New	12.00	10/06/06 05:30:00	0	mybuy
06 1256	oo	<input type="checkbox"/>	Packaging Labeling Change	10/15/06	Absolute Increase	Absolute Increase	Late	New	12.00	10/06/06 05:30:00	0	mybuy
06	SYNCRA_49 oo	<input type="checkbox"/>	Packaging Labeling Change	10/15/06	Absolute Increase	Absolute Increase	OK	New	12.00	10/05/06 05:30:00	0	mybuy
06	SYNCRA_69 oo	<input type="checkbox"/>	Packaging Labeling Change	10/15/06	Absolute Increase	Absolute Increase	OK	New	12.00	10/06/06 05:30:00	0	mybuy
06	SYNCRA_55 OAS	<input type="checkbox"/>	Product Discontinuation	10/27/06	Absolute Increase	Absolute Increase	OK	New	12.00	10/06/06 05:30:00	0	mybuy
06	SYNCRA_51 demo	<input type="checkbox"/>	Retailer Promotion	10/22/06	Absolute Increase	Absolute Increase	OK	New	34.00	10/06/06 05:30:00	0	mybuy

- User can select one source promotion at a time by selecting a 'Copy' button.

Note: 1. Historical and active promotions are valid source promotions.

2. All promotions belonging to the Creator Company are valid source promotions.

- The Copy Promotion-Target Event Search screen appears as shown below.

Figure 10–25 Copy Promotion-Target Event Search Screen

Creator Company: Co1
Promotion ID: BA1 - P/BB 1
Event ID: BA1
Event Name: BA1
Created By: CO_USER
Begin Date: 2007-02-19
End Date: 2007-02-19
Number Of Items: 0

Copy Promotion

* Event Search Criteria :

- After selecting a 'Copy' button, the user will be directed to the 'Copy Promotion-Target Event Search' screen. The source promotion details will be displayed at the top of the screen including the Creator Company, Promotion ID, Event ID, Event Name, Created By, Begin Date, End Date and Number of Items fields.

The target Event search criteria is based on the Event ID, Name and Description fields. The user can enter all or part of an Event ID, Name or Description. When the user selects the Search button, a list of valid target events will be displayed.

If an invalid target event is entered, a message will be displayed stating, 'No records found'.

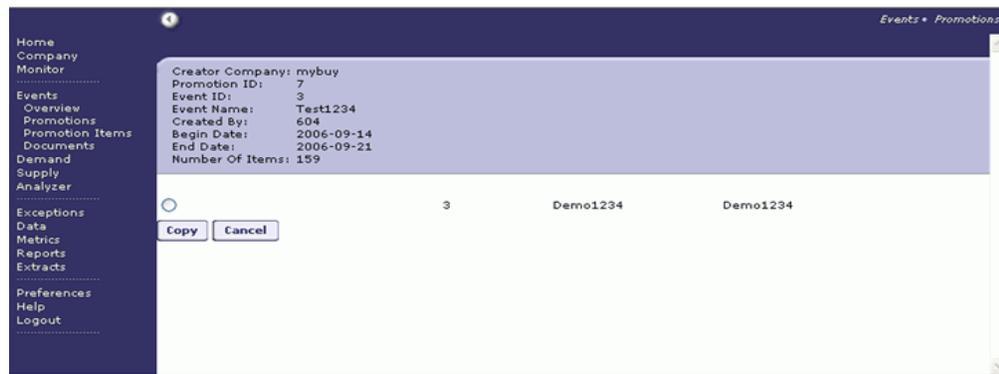
The user can select the 'Search' button to execute the target event search or cancel the copy promotion process by selecting the 'Cancel' button.

User has to keep the following points in mind before he proceeds with the search option.

Note:

- Target events must exist before the copy promotion process begins.
 - Target events must belong to the Creator Company.
 - Target events must have a future start date.
-
-

Figure 10–26 Copy Promotion-Search Result Screen



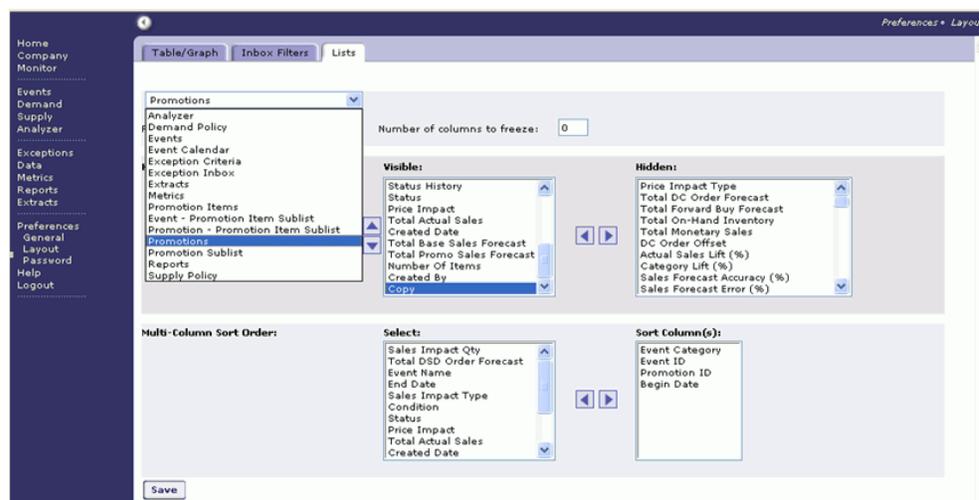
7. After selecting the 'Search' button, a list of valid target events will be displayed. The search results will contain a radio button for selection of a target event. Only one target event can be selected at a time. When the user has selected the desired target event, the 'Copy' button must be selected to execute the copy promotion process.
8. Now, by selecting the 'Copy' button, the user will be directed to the Promotions List screen. The refresh button must be selected, and then the newly created promotion will be displayed in the Promotions List along with the original source promotion.

Note:

- The newly copied promotion's attributes will default to:
 - Promotion ID = system generated ID
 - Start Date and End Date = target event's start date and end date
 - Status = New
 - Create Date = date that the copy promotion process was executed
 - Created By = username of the user that executed the copy promotion process
 - All other attributes will be identical to the source promotion's attributes.
- The newly copied promotion's attributes can be edited by selecting the 'Examine' button on the Promotions List

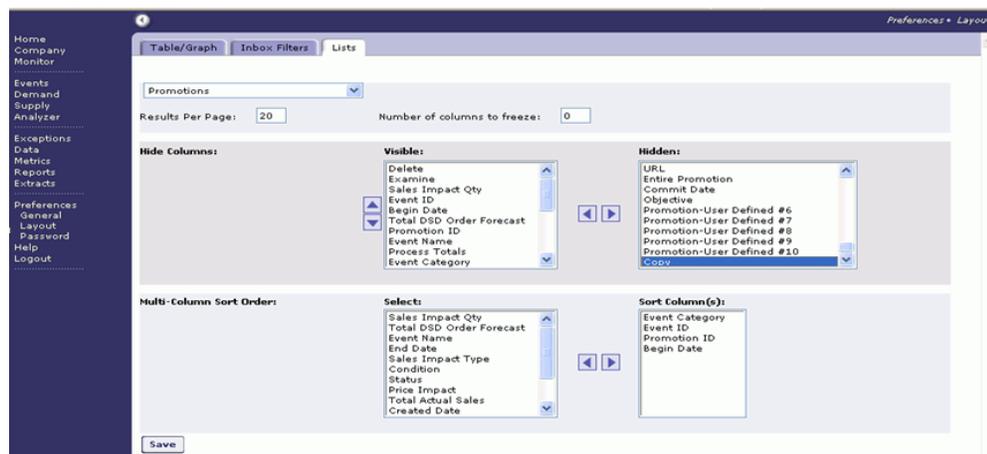
9. The Preferences/Configuration screen will need to be modified to allow the 'Copy' field visible like other fields on the Promotion List screen. In the screenshot below, the 'Copy' field is configured to be visible.

Figure 10–27 Setting the Preferences to the 'Copy' tab in Promotions



10. The user can also opt to hide the 'Copy' field. The screen below shows the 'Copy' field in the Hidden list:

Figure 10–28 Setting the the Copy tab Preference to Hidden



11. The Copy field appears on the Promotions List screen only if it is moved to the 'Visible' section.

Promotion Items

Promotion Items are located at the collaboration level. Only one Promotion Item can be defined for the a given product/location context and period. Promotion Items can be generated for a single-period, or can span multiple contiguous periods. To create and access Promotion Items, a leaf-level location, a partner location, and a product must be selected in the context chooser.

Each Item includes a collection of attributes, such as the price point, sales forecast, and order forecast for the Item. Some of the Event Item attributes will be inherited from the Promotion itself. However, establishing a local value for the attribute can override the inherited Item attributes. This allows pricing, timing, and quantities to vary by location and product.

Note: If 'Entire Promotion' is turned in use, and some Items are deleted, the Sales Impact Qty for the Items will not be re-adjusted.

The Events - Promotion items screen appears as shown:

Promotion Item attributes include:

- Price Impact Type
- Price Impact
- Sales Impact Type
- Sales Impact Qty
- DSD Order Forecast Qty
- DC Order Forecast Qty
- Forward Buy Forecast Qty
- Item Type

The impact of events is applied according to the rules shown in [Rules for Applying Event Impact](#). For absolute impacts, the specified impact is applied uniformly to all Item/time periods specified. For instance, if the you specify an absolute increase of 500 units, 500 is entered in the promo line for all time periods and all Items specified. There is no disaggregation of the entered value.

Table 10-7 Rules for Applying Event Impact

Impact Type	POS FC Impact	Price Impact
Percent Increase	Promo Qty = Base * (Impact QTY) / 100	Promo Price = Base * (1 + Impact QTY/100)
Percent Decrease	Promo Qty = -1 * Base * (Impact QTY) / 100	Promo Price = Base * (1 - Impact QTY/100)
Absolute Increase	Promo Qty = Impact QTY	Promo Price = Base + Impact QTY
Absolute Decrease	Promo Qty = -1 * (Impact QTY)	Promo Price = Base - Impact QTY
Absolute Change	Promo Qty = (Impact QTY) - Base	Promo Price = Impact QTY

Note: If Set Sales Impact and/or Set Order Impacts at Event level are not selected, the forecast for the unselected one will not be generated.

Algorithms for optimizing the timing, pricing, or calculating expected sales for an event are not included.

Viewing Promotion Items

There are two ways in which you can view a list of Promotion Items:

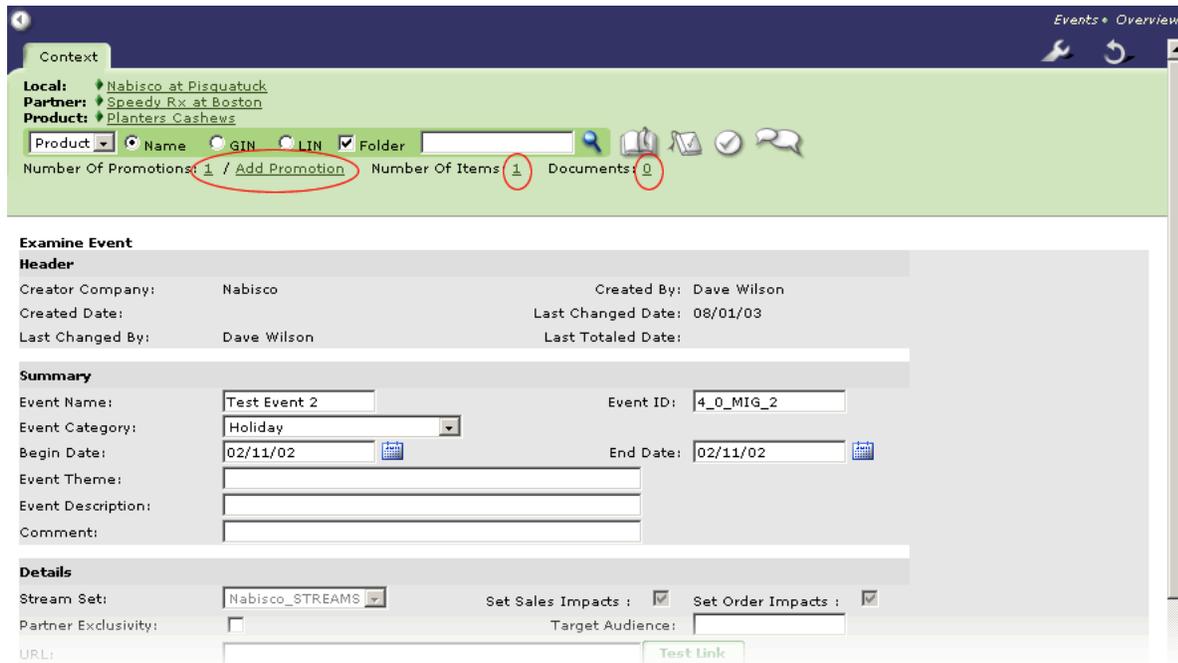
- A list of Items can be accessed through the Oracle Retail VCC menu by selecting Events - Promotion Items. This list will display the Items regardless of the Promotion they were created for. The Events - Promotion Items list is context-specific.

Figure 10-29 Events - Promotion Items List



- Similarly, Promotions can be viewed by accessing the Examine Events screen, where a 'Number of Items' link exists in the Context Chooser area. This number is clickable, and will display a list of Promotions for that Event.

Figure 10-30 'Number of Items' Link in the Context Chooser Area



Events - Promotion Items List

The Promotion Items screen displays a list of the following columns and enables the following actions:

- Delete – select a specific Item for deletion, or select all to delete.
- Examine – view/edit an individual Item's Begin and End Dates, Price and Sales Impact, Item Type, Item ID, and Comment.
- View Data – displays data stream data if all the streams in the stream set are accessible.
- Promotion Name - user defined name for the promotion.
- Event ID – the ID assigned to the Event
- Promotion ID – ID assigned to the Promotion
- Local Location – local location name
- Partner Location – partner name
- Product – product name
- Promotion Item ID – ID number assigned to the Promotion. This ID will be assigned by the system if not specified while creating the Promotion
- Event Name – User defined name of the Event
- Event Category – category the Event belongs to. Category indicates the reason for planning the Event (i.e., Holiday, Price Change, Retailer Promotion, etc.).
- Begin Date – date the Item's Promotion begins
- End Date – date the Item's Promotion ends
- Promotion Status – status of the Promotion for which the Item is a part

- Condition – 'OK' displays when Promotion condition is okay.
- Entire Promotion (hidden)
- Sales Impact quantity (hidden)
- Price Impact Type (hidden)
- Price Impact (hidden)
- DC Order Offset (hidden)
- DC Order quantity (hidden)
- Created By – Name of the User who created the Event (hidden)
- Created Date – Date the Promotion Item was created (hidden)
- Last Changed Date – Date the Promotion Item was last modified (hidden)
- Last Changed By – Name of the User who last modified the Promotion Item (hidden)
- Comment – Item-specific comments can be viewed and edited by clicking the dots in this column. Grey dots indicate that a comment has not yet been made for the Item.
- Promotion Item Type – can be either 'Promoted' or 'Cannibalized.'
- Printer-Friendly View – dots in this column can be clicked to display a screen formatted specifically for printing.
- Overridden – 'Yes' if any of the following fields for that Item are modified: Price Impact Type, Price Impact, Sales Impact Type, Sales Impact Qty are modified.
- Edit All – check boxes allow for selection of Promotion Items in order to change Attributes. Changes will take effect for all the Items selected under 'Edit All'

Note: One or more of the columns seen above may be hidden depending on your settings in Preferences -Layout - Lists - Promotion Items.

You can view, edit, comment on, and delete Items from the Event - Promotion Items screen. The comment column allows you to leave comments on individual Items by clicking on the dot beneath the speech bubble icon. Comment dots will appear white when they are empty. When they contain a comment, they will change color. If you have access rights to delete an Item, the delete column will contain check boxes which you can select for deletion, and then hit the Process Selected Items button.

To view the details for a particular Item, click the drilldown dot under the View/Edit icon.

Creating Promotion Items

Promotion Items can be viewed within the Event - Promotions list screen. They appear under the Number of Items column. If there are any Items for a particular Promotion, the exact number of Items that exist will appear in the column. You may add, edit and examine the Items by clicking on the numeric link. If you add more Items to the Promotion, the number on the List screen will increase, and will decrease if you remove Items. If the number displayed for a Promotion is '0', this indicates that there are no existing Items at present. You can click the '0' link to add Items.

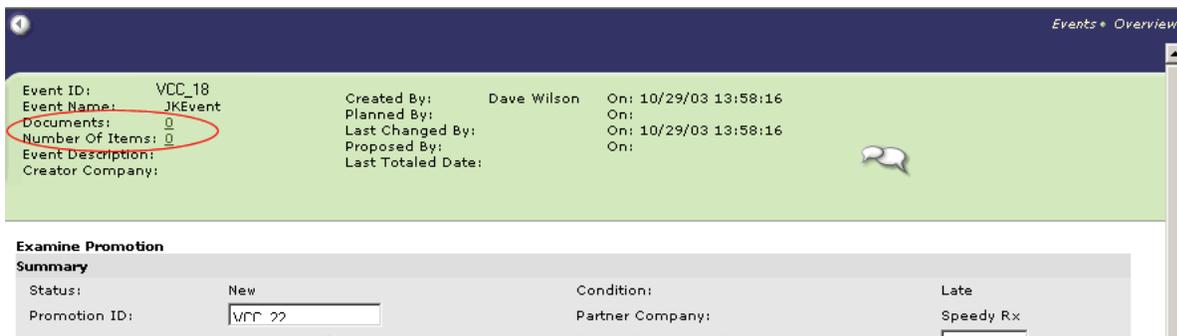
You cannot add Items from the Event level screens. Items are created for and associated with a Promotion, not Events. To view /edit/create items, you must always access them through either the Promotion or the main menu.

Note: After a Promotion Item have been created, if any of its included context items (Local, Partner, Product) are subsequently removed from their Master Data hierarchies and into the Recycle Bin, the Item is removed from the list of Event-Promotion Items. However, the Promotion Item number link will not be adjusted to reflect the reduced count until after the next Master Data Purge.

To add, view or edit Items through the Promotion screens:

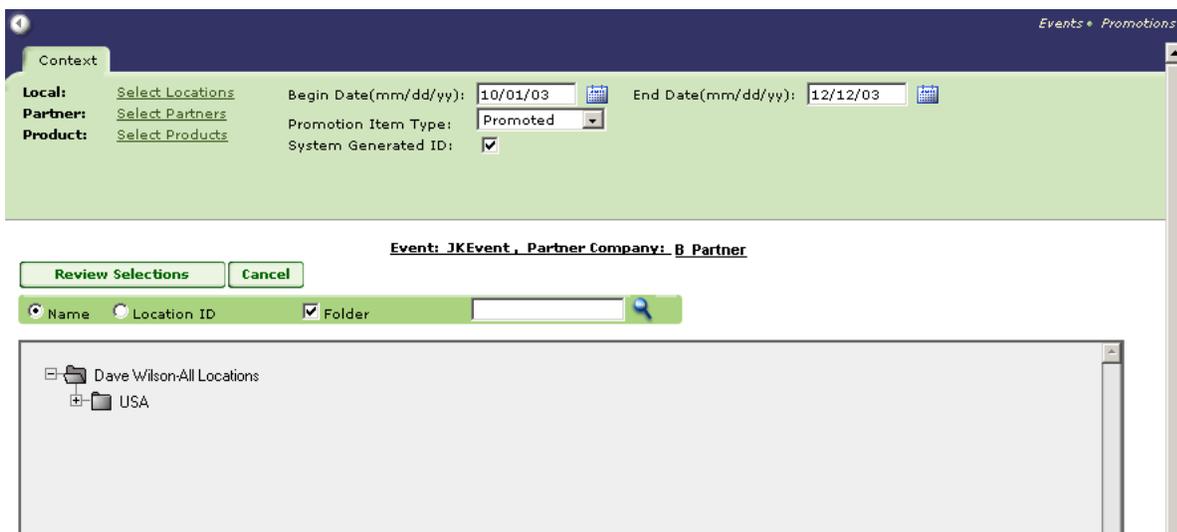
1. Select a context.
2. Drill down to examine the Promotion for which you would like to create Items. The Examine Promotion screen appears. From the Examine Promotion screen, click the Number of Promotions link in the chooser area.

Figure 10–31 Events - Overview Screen - Examine Promotion Section



3. Click the 'Number of Items' link in the chooser area. The tree view appears.

Figure 10–32 Tree View



4. Select the context at which to create the Items.
5. Enter Start and End dates, or leave the default dates.
6. Select the Promotion Item Type from the drop-down. Choices are 'Promoted' and 'Cannibalized'. Cannibalization is used when the forecast for an Item is lowered due to a particular type of Promotion. This could include a substitute item being promoted because a complimentary item is out of stock or discontinued.
7. If you want to create your own ID Prefix for the Items created, uncheck the System Generated ID check box. This allows you to set a Sequence Begin Number (default is '1') and Item ID Prefix, or to Manually enter the ID information for each item. If you uncheck this box
 - Select the Manual radio button, and enter the IDs manually on the next (Item List) screen. The 'Promotion Item ID' column will be left blank, so that you can enter each Item ID yourself.
 - Select the Generated radio button, and enter an Item ID Prefix and/or a Sequence Begin Number.
 - The Item ID Prefix allows you the option of entering your own sequence of 10 alphanumeric characters that will help you customize and identify the Items you create.
 - The Sequence Begin Number allows you to enter up to 5 numeric characters that determine with which number the Item ID sequence will begin. For instance, if you create 3 Items, and have entered 2000 as the Sequence Begin Number, your Items will be numbered: 2000, 2001, and 2002. Each consecutive number will be incremented by 1.

Note: If you have opted to manually assign Promotion Item IDs by unchecking the 'System Generated' check box, you will be required to assign unique alphanumeric Item IDs to each Item prior to clicking the Create button on the Promotion Item List screen.

8. Click Review Selections. The screen which allows you to review Collaboration Item selections appears.

Figure 10-33 Review Collaboration Item Selections



9. Configure the Begin and End Dates, if needed, and remove any unwanted Items in the list by checking the boxes in the Delete Column. Click the Delete button to remove items, or Create to proceed.
10. If date conflicts appear in the Error column during creation, resolve them by deleting unnecessary Items from the list or by changing the date range for that Item. All errors must be resolved prior to creating the Items.

Figure 10–34 Item Errors



Once you are satisfied with the contents of the list, select Create. After Item creation, you can check the Monitor - Jobs screen to verify that the job has been completed.

Note: On the Events - Promotions - List screen, the newly created Promotion will only be visible if the context chooser's product is at folder level, or if Items exist for the Promotion that match the selected product. Because Items are attached to a specific context and Promotions exist independent of context, you may need to select a folder-level product in order to see the newly created Promotions.

Deleting Promotion Items

To delete Promotion Items, select Events - Promotion Items from the menu. Click the Delete check boxes in the list of Items that you would like to remove, and click the 'Process Selected Items' button.

Addition and Deletion of promotion items:

The partners are not allowed to perform add, edit and delete operations on the promotion items while the promotion is in certain statuses like Active, Complete, Planned etc. This is shown in the screen below:

Figure 10-35 Add / Delete Promotion Items

Event ID	Promotion ID	Local Location	Partner Location	Product	Promotion Item ID	Event Name	Event Category	Begin Date	End Date	Status	Condition	Overridden	Entries Promotion	Sales Price Impact	Promote Type
SYNCRA_144	SYNCRA_375	B1-LO South Wales	DYNAMO LAUNDRY POWDER CONC MAT	SYNCRA_585	test promo naming	Freight Allocation	03/08/06	03/17/06	New	OK	No	No	No	5.00	Absolu Decrease
SYNCRA_144	SYNCRA_375	B1-LO Northern Territory	DYNAMO LIQUID MATTIC 70	SYNCRA_586	test promo naming	Freight Allocation	03/08/06	03/17/06	New	OK	No	No	No	5.00	Absolu Decrease
SYNCRA_144	SYNCRA_375	B1-LO South Wales	DYNAMO LAUNDRY POWDER CONC I K	SYNCRA_587	test promo naming	Freight Allocation	03/08/06	03/17/06	New	OK	No	No	No	5.00	Absolu Decrease
SYNCRA_144	SYNCRA_375	B1-LO Victoria	DYNAMO LIQUID REGULAR 200	SYNCRA_588	test promo naming	Freight Allocation	03/08/06	03/17/06	New	OK	No	No	No	5.00	Absolu Decrease
SYNCRA_144	SYNCRA_371	B1-LO Northern Territory	DYNAMO LIQUID REGULAR	SYNCRA_589	test promo naming	Freight Allocation	03/08/06	03/17/06	New	OK	No	No	No	5.00	Absolu Decrease
SYNCRA_144	SYNCRA_375	B1-LO Northern Territory	DYNAMO LIQUID EUCALYPT	SYNCRA_590	test promo naming	Freight Allocation	03/08/06	03/17/06	New	OK	No	No	No	5.00	Absolu Decrease
SYNCRA_144	SYNCRA_375	B1-LO Queensland	DYNAMO LAUNDRY POWDER CONC REG	SYNCRA_591	test promo naming	Freight Allocation	03/08/06	03/17/06	New	OK	No	No	No	5.00	Absolu Decrease
SYNCRA_144	SYNCRA_375	B1-LO South Wales	DYNAMO LAUNDRY POWDER CONC REG	SYNCRA_592	test promo naming	Freight Allocation	03/08/06	03/17/06	New	OK	No	No	No	5.00	Absolu Decrease
SYNCRA_144	SYNCRA_375	B1-LO South Australia	DYNAMO LAUNDRY POWDER CONC REF	SYNCRA_593	test promo naming	Freight Allocation	03/08/06	03/17/06	New	OK	No	No	No	5.00	Absolu Decrease
SYNCRA_144	SYNCRA_375	Coles Queensland	PLAX MOUTHWASH PEPPERMINT	SYNCRA_594	test promo naming	Freight Allocation	03/08/06	03/17/06	New	OK	No	No	No	5.00	Absolu Decrease
SYNCRA_144	SYNCRA_375	B1-LO South Australia	DYNAMO LAUNDRY POWDER CONC REG	SYNCRA_595	test promo naming	Freight Allocation	03/08/06	03/17/06	New	OK	No	No	No	5.00	Absolu Decrease

Table/Graph View in Promotion Items

The Events - Promotion Items list allow you to view both you and your partner's datastream data with the 'View Data' feature. You may also edit your data while in this mode.

To view data:

1. Set your context.
2. Select Events - Promotion Items. The Promotion Item screen appears.
3. Click the drilldown dot under the View Data column. The Table/Graph screen appears.
4. Edit data and click Save. 'Successfully Saved' message appears at the bottom of your display pane.
5. Click Back to return to the Item list.

Documents

Documents are attachments that can be associated with either Events or with Promotions. Documents must be added to one of these levels in order to be accessible for download.

File size limitations for document attachments can be configured by the superuser in the Configuration - General tab. The default maximum file size is 1Mb.

Viewing Documents

Documents attached at the Event level can be viewed by examining the Event, and then examining the number of Documents attached to that Event. You cannot access

Events' documents at the Promotion level, and vice versa (i.e., these uploaded attachments are saved only to an Event, or only to a Promotion, and are mutually exclusive).

You can, however, view both Event level and Promotion level documents at the same time by accessing the Events - Documents list screen.

The columns that appear in the list screen include:

Figure 10–36 Events - Documents List Screen

Event Name	Event Category	Event Theme	10/05/04 (41)	10/12/04 (42)	10/19/04 (43)	10/26/04 (44)	11/02/04 (45)	11/09/04 (46)	11/16/04 (47)
WK-41	Holiday	Columbus Day	■	■	■	■			
WK-44	Joint Promotion					■	■	■	■
WK-46	Joint Promotion						■	■	■
WK-47	Joint Promotion	Pre-Thanksgiving						■	■
WK-48	Holiday	Thanksgiving							■

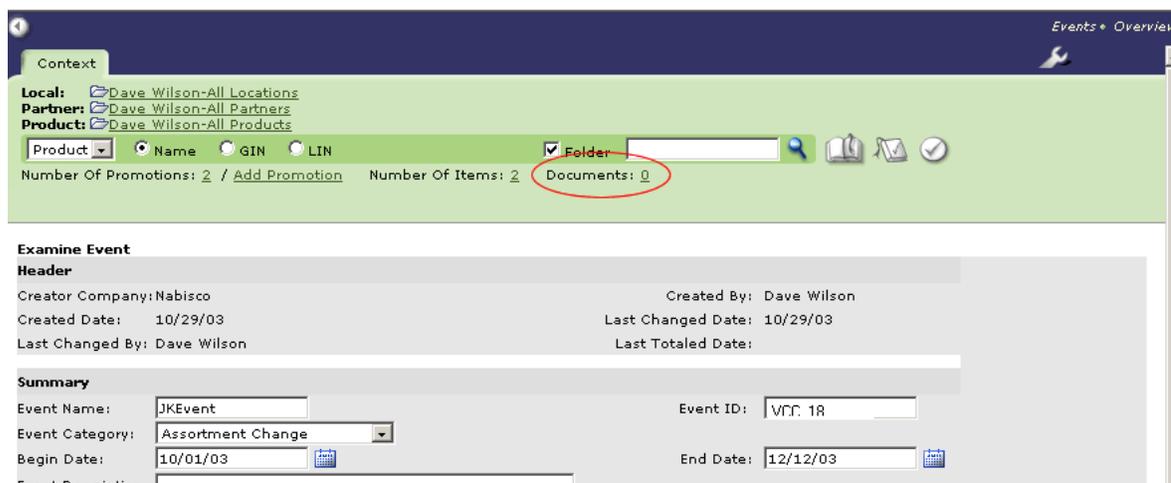
- Delete – remove selected document.
- Download – contains the filename of each attachment. Each filename is a download link.
- Description – optional description of the file.
- Creator Company – company from which the document originates.
- User Name – username of the person who attached the file.
- Event Name – name of the event the document is attached to.
- Event ID – ID of the event the document is attached to.
- Promotion ID – ID of the promotion the document is attached to.
- Upload Date/Time – date and time the document was attached.

Attaching Documents to Events and Promotions

Documents can be attached at either the Event or Promotion level in precisely the same fashion. Once the event or the promotion you would like to create the attachment for is selected

1. Examine the Event or Promotion which you will attach the document to by clicking on the List screen Examine/View/Edit drilldown. The Examine screen appears.
2. Click the Documents link number that appears in the context chooser.

Figure 10-37 'Documents' Link in the Context Chooser Area



If the link reads '0', it indicates that there are no documents attached to the Event or Promotion at this time.

3. Browse for the document you would like to attach, or enter a path for the file.

Figure 10-38 Browse for the Document to Attach



4. Enter a Description for the file (optional).
5. Click Upload.

The new attachment will appear in the upload screen's list, as well as the Events - Documents list screen.

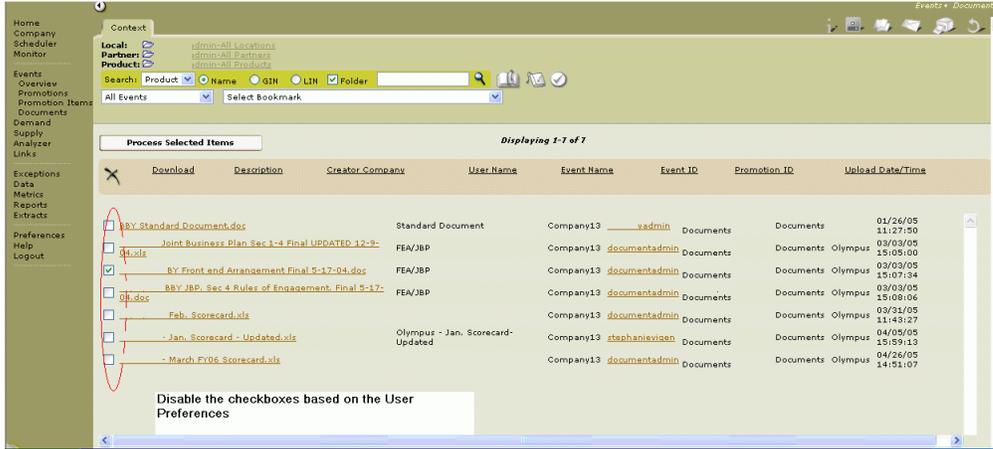
Removing Documents

To delete a document:

1. Select Events - Documents
2. Check the delete check box of the document or documents you wish to remove.
3. Click Process Selected Items.
4. The user can configure VCC to disable documents delete option for collaborative partners. This would disable the collaborative partner from deleting the documents created.

The screen below shows how the user can disable the delete column option to certain documents based on the User preferences.

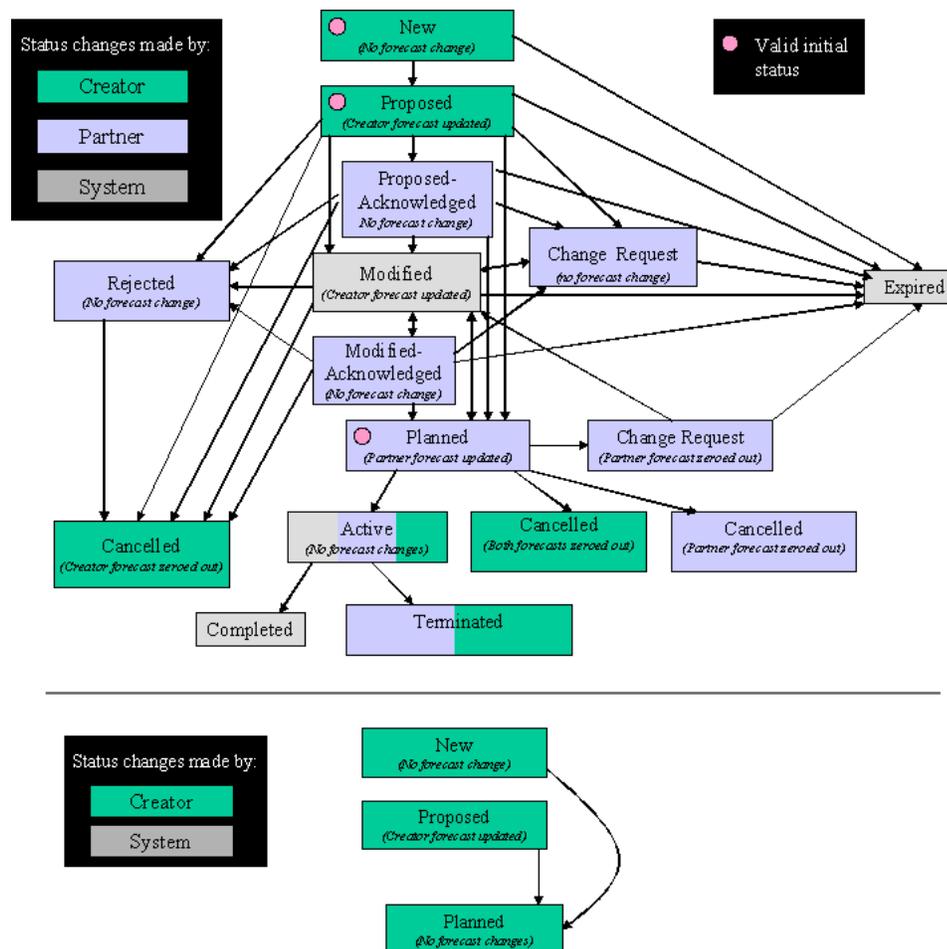
Figure 10–39 Delete a Document



Promotion Status Changes

The figure below illustrates the promotion status lifecycle, with all the The figure at the bottom shows the two additional transitions that are allowed when the partner company is non-local.

Figure 10-40 Promotion Status Changes



Viewing the User Defined Fields

From Release 12.0.2, the VCC application includes 40 additional user defined fields in the Promotions and Promotion-Items modules. These 40 new fields are configurable and allow the user to designate labels, default values and dropdown options. The new user defined fields will behave in the same fashion as the existing 20 user defined fields in the Promotions and Promotion-Items screens.

Promotions

Ten dropdown lists that are configured in the 'Module Configuration' chapter.

- Dropdown fields will be named 'Promotion-User Defined #21' through 30
- For each of the ten dropdown lists, twenty configurable values are provided

Ten dropdown lists that are configured in the 'Module Configuration' chapter

- Text fields will be named 'Promotion-User Defined #11' through 20

Each of the twenty fields will contain an editable Label field, a Show checkbox field and a Mandatory checkbox field.

Changes must be saved to be viewed on other screens.

Promotion Items

Ten dropdown lists that are configured in the 'Module Configuration' chapter.

- Dropdown fields will be named 'PromotionItem -User Defined #21' through 30
- For each of the ten dropdown lists, twenty configurable values are provided.

Ten text fields that are configured in the 'Module Configuration' chapter.

- Text fields will be named 'Promotion Item-User Defined #11' through 20

Each of the twenty fields, provide an editable Label field, a Show checkbox field and a Mandatory checkbox field.

Changes must be saved to be viewed on other screens.

UDF Dropdown Lists

- The default names of the twenty values will be 'Option1' through 20
- For each UDF dropdown value, editable Label fields are provided.
- For each UDF dropdown value, Show checkbox fields are provided.

Changes must be saved to be viewed on other screens.

Accessing the User Defined Fields

Steps to configure the UDFs is explained in the chapter, 'Managing the Company Module Configuration'. The ability to Hide/View these fields can be configured as well. This is explained in the chapter 'Preferences' in the Layout Preferences section.

Configuring the User Defined Fields

1. Select **Company - Module Configuration - Events tab - Labels**. This will allow the user to access the Promotions, Promotion-Items and UDF dropdown lists configuration
2. Configure the Promotion UDFs by selecting the 'Promotions' tab in the Label Type dropdown list.
3. Configure the Promotion-Item UDFs by selecting the 'Promotion-Items' tab in the Label Type dropdown list.
4. Configure the UDF dropdown list values by selecting the UDF field name in the Label Type dropdown list (Ex: Promotion Item-User Defined #21).
5. UDFs are treated in the same fashion as all other fields on the Promotions or Promotion-Items screens.
6. New UDFs will be listed below the existing **ten** UDFs in the User Defined section of the Promotions and Promotion-Items screen.

UDF Text Fields

- Each UDF contains an editable textbox to enter a label. If this field is blank, the default name is displayed (Ex:Promotion Item-User Defined #11).
- Each UDF contains an editable textbox to enter a default value. If this field is blank, the field will be displayed with a null value.
- Each UDF contains a Show checkbox to configure display on the appropriate Create/Edit screen.
- Each UDF contains a Mandatory checkbox to configure required usage on the appropriate Create/Edit screen.

Dropdown List UDFs

- Each UDF contains an editable textbox to enter a label. If this field is blank, the default name is displayed (Ex:Promotion Item-User Defined #21).
- Each UDF will contain a dropdown list with twenty configurable values.
- Each UDF will contain a Show checkbox to configure display on the appropriate create/Edit screen.
- Each UDF contains a Mandatory checkbox to configure required usage on the appropriate Create/Edit screen.

UDF Dropdown List Values

- Each dropdown list value contains an editable textbox to enter a label. If this field is blank, the default name is displayed (Ex: Opton 1).
- Each dropdown list value will contain a Show checkbox to configure display in the dropdown list.

After setting preferences for these fields, they can be viewed in the -Promotions and Promotion-Items create/edit screens as shown below:

Figure 10–41 User Defined Fields in Promotions Module

Field Label	Value	Field Label	Value
Event-User Defined #1:	null	Event-User Defined #2:	null
Promotion-User Defined #1:	null	Promotion-User Defined #2:	null
Promotion-User Defined #3:	null	Promotion-User Defined #4:	null
Promotion-User Defined #5:	null	Promotion-User Defined #6:	null
Promotion-User Defined #7:	null	Promotion-User Defined #8:	null
Promotion-User Defined #9:	Yes	Promotion-User Defined #10:	Yes
Promotion-User Defined #11:	null	Promotion-User Defined #12:	null
Promotion-User Defined #13:	null	Promotion-User Defined #14:	null
Promotion-User Defined #15:	null	Promotion-User Defined #16:	null
Promotion-User Defined #17:	null	Promotion-User Defined #18:	null
Promotion-User Defined #19:	null	Promotion-User Defined #20:	null
Promotion-User Defined #21:	option1 is very big so it may increase window size	Promotion-User Defined #22:	22opt1
Promotion-User Defined #23:	option1	Promotion-User Defined #24:	option1
Promotion-User Defined #25:	option1	Promotion-User Defined #26:	option1
Promotion-User Defined #27:	op1	Promotion-User Defined #28:	option1
Promotion-User Defined #29:	option1	Promotion-User Defined #30:	null

Metrics

Inventory Turns:	<input type="text"/>	Number Of Expedited Shipments:	<input type="text"/>
Periods Of Supply:	<input type="text"/>	Periods Of Supply (Post-Event):	<input type="text"/>

As shown in the graphic above, the labels entered for the User Defined Fields starting from User Defined Field #1, through User #30 is shown.

In the picture below, note that the following user defined fields: #9, #21, #26, #27, #28, #30, #29, #25 are dropdown lists and all the other fields are **Text** fields.

Figure 10-42 User Defined Fields in Promotion Module

These fields are displayed in the columns below in the **Promotions Details Screen**.

Figure 10-43 Promotion screen displaying the UDFs

These fields are displayed in the columns below in the Promotion-Items details screen.:

Figure 10-44 Promotion-Item screen displaying UDFs

Home	Promotion Item-User Defined #1	4444444444444444	BA1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company	Promotion Item-User Defined #2	PI UDF2	BA2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Master Data	Promotion Item-User Defined #3	PI UDF3	BA3	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Aggregates	Promotion Item-User Defined #4	PI UDF4		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Collaborations	Promotion Item-User Defined #5			<input type="checkbox"/>	<input type="checkbox"/>
Price Profile	Promotion Item-User Defined #6			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Roles & Users	Promotion Item-User Defined #7			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Disagg. Setup	Promotion Item-User Defined #8			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Module Config	Promotion Item-User Defined #9		Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
General Config	Promotion Item-User Defined #10		Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Purge Requests	Promotion Item-User Defined #11			<input checked="" type="checkbox"/>	<input type="checkbox"/>
UOM	Promotion Item-User Defined #12			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Scheduler	Promotion Item-User Defined #13	PI UDF13	12345	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Monitor	Promotion Item-User Defined #14	PI UDF14		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Events	Promotion Item-User Defined #15			<input type="checkbox"/>	<input type="checkbox"/>
Demand	Promotion Item-User Defined #16			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Supply	Promotion Item-User Defined #17			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analyzer	Promotion Item-User Defined #18			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Exceptions	Promotion Item-User Defined #19			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data	Promotion Item-User Defined #20			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Metrics	Promotion Item-User Defined #21		editedp2101	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reports	Promotion Item-User Defined #22		p2101	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Extracts	Promotion Item-User Defined #23	UDF#23	p2301	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Preferences	Promotion Item-User Defined #24	UDF#24	p2401	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Help	Promotion Item-User Defined #25	PI UDF25	aa	<input type="checkbox"/>	<input type="checkbox"/>
Logout	Promotion Item-User Defined #26		option1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Promotion Item-User Defined #27		option1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Promotion Item-User Defined #28		option1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Promotion Item-User Defined #29		ha1	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ORACLE

This chapter consists of the following:

- [Introduction](#)
- [Demand Policy Parameters](#)
- [Viewing Demand Policies](#)
- [Creating a Demand Policy](#)
- [Using Interactive Demand](#)
- [Batch Jobs.](#)
- [Using Lift Factors](#)

Note: The Demand module is a separately priced option, and access to it as a menu item will only appear if you have obtained a Demand license.

Introduction

The Demand module creates base forecasts by applying statistical algorithms to historical time series. The module allows you to view and enter overrides to the system-generated forecast prior to saving the forecast. This module also allows you to create batch forecast jobs that can be run on a routine schedule through Scheduler tasks.

Because the Demand module provides time-series based statistical forecasts, it is not appropriate for the following tasks:

- Generating promotional forecasts.
- Providing causal forecasting, like a rise in sales due to coupons.
- Providing order, inventory or price forecasts (order forecasting can be accomplished with Oracle Retail VCC Supply Planning).
- Applying supply chain or business constraints to the statistically generated forecast, such as production capacity limitations.

You begin by selecting an aggregate context or a leaf-level context. If an aggregate context is chosen and no "Sum" is specified, forecasts for all valid leaf level combinations below the aggregates will automatically be generated. This is a powerful feature for forecasting a large number of items, since you will not need to explicitly select every possible combination.

You select the historical date range to serve as the input to the statistical forecast, a future date range for the forecast series, and the forecast method to be used. The Demand module submits historical data from each of the selected contexts to the software forecasting engine (called Geneva, see [Geneva Forecast Engine](#) for details) to generate a forecast. For each historical data series, the forecasting engine preprocesses the data using the specified method. Next, the engine optimizes the forecast model parameters for the selected model and computes the forecasted time series. An expert system is available to create a "best-fit" forecast based on your historical data. When submitting multiple contexts, the expert system optimizes each context individually.

The user-driven forecasting process has the following steps:

- Choose your demand policy contexts
- Choose demand policy parameters
- Submit the job

An alternate process that automates the task of creating forecasts is also available:

- You can create a batch forecast job with preset parameters that can roll forward as time elapses.
- This batch forecast job is scheduled to execute using the Oracle Retail VCC Scheduler.

Demand Policy Parameters

The demand parameters stored in the permanent policy are used to initialize the temporary policy in the interactive forecasting screen. These permanent policies are also used when processing batch forecasts. The parameters include:

- **Method** – The Demand policy uses one of the following methods of time-series statistical forecasting:
 - Expert System (Default) tests each of the other methods against the data set, and automatically selects the forecast model that best fits your actual data. The expert system also automatically optimizes the various parameters required for the best-fit model.
 - Linear Regression measures the long-run trend in the data. All historical data points are given the same weight in predicting the policy.
 - Nonlinear Regression assumes that trends vary over time. The Demand module includes the following Nonlinear Regression transforms:
 - * Nonlinear Regression 1: $x' = \log(x)$; $y' = \log(y)$
 - * Nonlinear Regression 2: $x' = x$; $y' = \ln(y)$
 - * Nonlinear Regression 3: $x' = \log(x)$; $y' = y$
 - * Nonlinear Regression 4: $x' = 1/x$; $y' = 1/y$
 - * Nonlinear Regression 5: $x' = x$; $y' = \ln(y / (K-y))$
 - Single Exponential Smoothing weights recent data more heavily than older data, and also assumes that there is no trend or seasonal pattern in the data.
 - Double Exponential Smoothing adds a trend term.
 - Holt-Winters Exponential adds a seasonal component to the forecast. The Holt-Winters method is sensitive to outliers.

If there is not enough data to calibrate the seasonal factors from Holt-Winters method, the Double Exponential Smoothing method, which is basically the Holt-Winters method without seasonal adjustment, is automatically substituted.

- **Smoothing Pre-Filter** – The smoothing pre-filter is a moving-median type filter that smooths outliers from the input data stream before it is submitted to the forecasting engine.

The median pre-filters are useful for filtering out short events, such as a promotion, or a weather-related event. The number of periods determines how long of an event the filter will remove.

For example, a one-period event, a data stream may look like:

100, 100, 180, 100, 100

- For period 2, a 3-point median would use: 100, 100, 180. The median value is 100.
- For period 3, a 3-point median would use: 100, 180, 100. The median value is 100
- For period 4, a 3-point median would use: 180, 100, 100. The median value is 100.

So it has perfectly smoothed out the outlier.

General rule is the number of points in the filter must be $(1+2x)$ where x is the length of the event you want to filter out. So a three-period median smooths one-period events, a nine-period median smooths four-period events, etc.

- **Seasonal Pre-Filter** – A filter that de-seasonalizes the outliers from the input data stream before it is submitted to the forecasting process. The Demand module includes the following seasonal pre-filters:
 - Moving Periodic Total pre-filters the data by aggregating weekly data into 52 week moving totals. The forecasting engine predicts the moving total of the information and then unravels this aggregate forecast back into weekly buckets.
 - Seasonal Adjustment pre-filter that calculates seasonal factors with less than a complete year of history as well as calculates seasonal factors that are not unduly influenced by outliers caused by trade or consumer promotion.
- **Trials** – The number of times, 1 through 5 (3 is default), that the calculations are performed to generate a forecast. The default number of trials is generally sufficient. A higher number may provide more accurate forecasts but will require more processing time.
- **End of Life** – The policy can specify an end-of-life date, which can be any period in the database. If specified, then the forecast is forced to zero for all periods after the end-of-life date.
- **Use Like Item** – Since historical data is required to generate a forecast, new or replacement SKU's can present a challenge. One way around the problem is to allow the use of history data from a "like item".

For example, "Use like item" = "yes", "End Date" = 9/1/2001, Multiplier = 1.5. Request a forecast using history range from 6/1/2001 to 10/31/2001 Current item is A, "Like Item" is B. The history from item B for the periods 6/1 to 9/1 is multiplied by 1.5, and pre-pended to the history from item A from 9/2 through 10/31, yielding a single composite history stream from 6/1 through 10/31. This

entire composite stream is passed to the forecasting engine, to generate the future forecast for item A.

If "Use Like Item" is set to "No", then "Context", "End Date", and "Multiplier" do not apply.

Match Option

When setting a like-item at an foldercontext by using the "edit all" functionality, or when first creating leaf-level policies at a folder, the "match" option will set that dimension of the like item to match that of the leaf-level policy, while using the other dimensions from the selected like item. For example, consider there were two demand policies under the All Locations, Partner X, Product 1 context:

Location A, Partner X, Product 1

Location B, Partner X, Product 1

The user selects "edit all", and chooses All Locations, Partner X, Product 2 as the like item, and selects "Match Location". The resulting policies are as follows:

Table 11–1 Demand Policies

Policy Context	Like Item
Location A, Partner X, Product 1	Location A, Partner X, Product 2
Location B, Partner X, Product 1	Location B, Partner X, Product 2

Not all combinations of the above selections are valid. For instance,

- If "Expert System" is the method selected, then no selection is allowed for either Smoothing or Seasonal. (The forecasting engine determines them automatically.)
- If Holt-Winters is the method selected, then Seasonal Pre-Filter is automatically set to "None".
- If "disabled" is the method selected, then no other options are available, and this item is not forecast. Batch forecast jobs that contain this item skip it, and if a user enters the interactive forecast screen for this item, they get a message that it has been disabled.

Disabled policies are essentially "saved" or "stored" policies that are inactive until their method is manually changed. This method is useful when large batches of "pending" policies are generated from folder root levels, and then stored until further notice. The disabled method can also be used to avoid the inconvenience of deleting and recreating policies when you wish some policies to be inactive while others are active and being processed in a batch job. With the "disabled" feature, you have a finer degree of control over which policies you wish to affect your data now, and which policies you would like to store until needed.

Advanced Parameters

These advanced parameter can be shown or hid by checking or un-checking the "Advanced" box.

- **Fit Type** – "All Points" calculates the fit against all data points (including any outliers) in the holdout period. "Baseline" calculates the fit against a moving-median smoothed baseline of the data in the holdout period.

- **End-of-Life** – displays the date if end-of-life feature is used, or n/a.
- **Lift Factor** – displays "Yes" if a lift factor is used.
- **Created By** – displays the user name of the creator of the policy.
- **Last Updated** – displays the date and time when the policy was last updated.
- **Process on Demand** – this check box will enable you to generate forecasts for the selected policies. To initiate processing click the "Apply Changes" button.
- **Last Plan** – displays the date that the last demand plan for this policy was run.
- **Last Plan By** – displays the user that ran the last demand plan for this policy.
- **Period Overlay** – displays the period overlay name selected. Default display is "none".

Note: One or more of the columns described above may be hidden depending on your settings in Preferences - Layout - Lists - Demand Policy.

Creating a Demand Policy

Demand policies contain collaboration-specific data relevant to the forecasting process. Demand policies can apply at leaf-level and folder-level collaboration items. You must specify which streams to use in both the demand and lift factor calculations by creating stream sets in **Company - Module Config - Demand**. For details see [Managing Demand Module Stream Set for a Company](#).

When creating Demand policies bear in mind that an aggregate Demand policy cannot be created with a Measure stream for an output stream. Output streams at aggregate level must be disaggregated, and Measure streams are not disaggregated.

To create a Demand policy

1. Set your context.
2. Select **Demand - Policy - Create** and the following screen appears:

Figure 11–2 Demand Policy Screen

The screenshot shows the 'Demand Policy' screen. At the top, the context is set to 'Local: Dave Wilson-All Locations', 'Partner: Wall Drugs at J'ville', and 'Product: Planters Cashews'. Below this, there are radio buttons for 'Name', 'GIN', and 'LIN', and a checked 'Folder' checkbox. The main area contains several sections of settings:

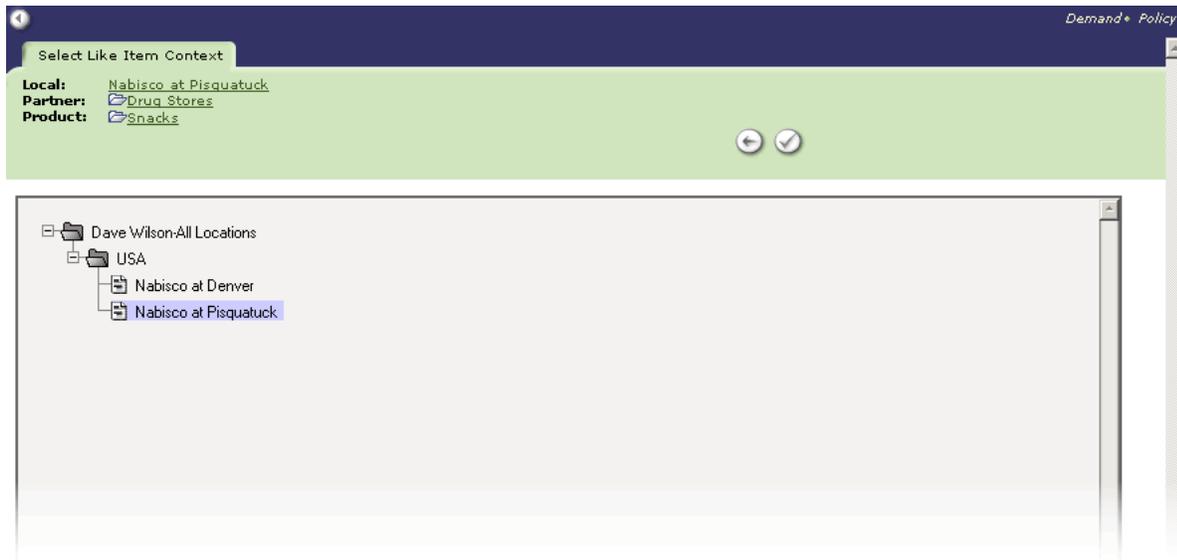
- Aggregate On:** None
- Stream Set Name:** Demand
- Method:** Expert System
- Smoothing Pre-Filter:** Determined By Expert System
- Seasonal Pre-Filter:** Determined By Expert System
- Trials:** 3
- Period Overlay:** None
- End-of-Life Date:** No
- Use Lift Factor:** No
- Use Like Item:** No

At the bottom, there are 'Dates-' settings for 'History' and 'Forecast' with 'Rolling' start and end options. 'Save' and 'Cancel' buttons are at the bottom left.

3. For each context dimension that is at folder level, an **Aggregate On** check box appears giving you the choice of aggregating on that dimension. If you choose not to check any of the boxes, the policy will be created for all leaf-level contexts. If you do not have a folder level selected, "None" will display for Aggregate On. Aggregate On check boxes will not appear for and "All" level (All Locations, All Partners, or All Products), but only at the folder levels beneath it.
4. Select the Stream Set Name for which you want to create the policy from the drop-down list (see [Managing Demand Module Stream Set for a Company](#)).
5. Choose a forecasting method from the **Method** drop-down list.
6. Choose a smoothing pre-filter from the **Smoothing Pre-Filter** drop-down list.
7. Choose seasonal pre-filter from the **Seasonal Pre-Filter** drop-down list.
8. Select the number of trials, 1 through 5 (3 is default), from the **Trials** drop-down list.
9. Select a Period Overlay, if you have previously created one.
10. Choose whether the demand policy will have an end-of-life date by selecting Yes or No from the **End of Life Date** drop-down list. If Yes, select the date from the pop-up calendar, or manually enter the date in the text box.
11. Choose whether the demand policy will use a lift factor by selecting Yes or No from the **Use Lift Factor** drop-down list.
12. Choose whether the demand policy will use a like item by selecting Yes or No from the **Use Like Item** drop-down list.

If you select Yes, click **Select** and choose the like item context.

Figure 11–3 Select Like Item Context Screen



Click the "Apply Changes" icon to set the like item context, or click the "Back to Policy" icon to return to the **Demand - Policy** screen

The like item can be at an aggregate context while the demand policy is at leaf-level, and vice versa.

The Like Item you have selected appears to the right of the drop-down. You can change your selection by clicking the "Select New" button.

Figure 11–4 "Select New" Button



13. If you are using a like item, enter the **Like Item End Date** by selecting the date from the pop-up calendar, or manually enter the date in the text box.
14. If you are using a like item, enter the **Like Item Multiplier** (a decimal number greater than "0").
15. Determine whether the History and Forecast Start and End dates should be Fixed or Rolling by selecting from the drop-downs. If you choose Rolling, enter the number of periods. If you select Fixed, select a date from the calendar.

For a fixed job, the period ranges specified below will be actual periods:

- **History Start** – Any period in database prior to current period. First period of history to use.
- **History End** – Any period in database after History Start, and no later than current period. Last period of history to use.
- **Forecast Start** – Any period in database later than current period. First period of forecast to output.

- Forecast End** – Any period in database later than Forecast Start. Last period of forecast to output.

For a rolling job, history and forecast date ranges are entered as offsets from the date of running the job. If "rolling" is selected, specify how often you want to run the job (e.g., run the job every five days).

- History End** – number of periods back from the period in which the job is run. (Any integer greater than or equal to "0".)
- History Periods** – number of history periods to use. (An integer greater than "0".)
- Forecast Start** – number of periods forward from the period in which the job is run. (An integer greater than "0".)
- Forecast Periods** – number of forecast periods to use. (An integer greater than "0".)

Note: If your start period is rolling, your end period must also be rolling, but you may have a fixed start and a rolling end period.

16. Click **Save**. Your new policies will appear in the List screen.

Figure 11–5 Demand - Policy - List Screen

	Product	Local	Partner	Method	End-Of-Life	Lift Factor	Created By	Last Updated	Process On Demand	Last Plan	Last Plan By	Period Overlay
<input type="checkbox"/>	Planters Holiday Pack	USA	Speedy Rx at Boston	Nonlinear Reg1: $x'=\log(x); y'=\log(y)$	11/30/02 - 11/30/02	Yes	Dave Wilson	10/14/02 16:52:39	<input type="checkbox"/>			None
<input type="checkbox"/>	Planters Cashews	USA	Speedy Rx at Boston	Nonlinear Reg1: $x'=\log(x); y'=\log(y)$	11/30/02 - 11/30/02	Yes	Dave Wilson	10/14/02 16:52:39	<input type="checkbox"/>			None
<input type="checkbox"/>	Planters Mixed Nuts	USA	Speedy Rx at Boston	Nonlinear Reg1: $x'=\log(x); y'=\log(y)$	11/30/02 - 11/30/02	Yes	Dave Wilson	10/14/02 16:52:39	<input type="checkbox"/>			None
<input type="checkbox"/>	Snacks	Nabisco at Pisquatuck	Speedy Rx at Boston	Single Exponential Smoothing		Yes	Dave Wilson	10/14/02 16:53:17	<input type="checkbox"/>			None
<input type="checkbox"/>	Planters Holiday Pack	Nabisco at Denver	Wall Drugs at St. Cloud	Expert System		Yes	Dave Wilson	10/14/02 16:59:07	<input type="checkbox"/>			None
<input type="checkbox"/>	Planters Holiday Pack	Nabisco at Denver	Wall Drugs at J'ville	Expert System		Yes	Dave Wilson	10/14/02 16:59:07	<input type="checkbox"/>			None
<input type="checkbox"/>	Planters Holiday Pack	Nabisco at Denver	Wall Drugs at Redwing	Expert System		Yes	Dave Wilson	10/14/02 16:59:07	<input type="checkbox"/>			None
<input type="checkbox"/>	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	Expert System		Yes	Dave Wilson	10/14/02 16:59:07	<input type="checkbox"/>			None
<input type="checkbox"/>	Planters Cashews	Nabisco at Denver	Wall Drugs at St. Cloud	Expert System		Yes	Dave Wilson	10/14/02 16:59:07	<input type="checkbox"/>			None

Clicking on the View/Edit dot will take you to a screen similar to the Create screen where you may edit the policy options.

Figure 11–6 View/Edit Screen with Editable Policy Options

Aggregate On:	Local	
Stream Set Name:	Demand	
Method:	Nonlinear Reg1: $x'=\log(x)$; $y'=\log(y)$	
Smoothing Pre-Filter:	7-Period Moving Median	
Seasonal Pre-Filter:	Moving Periodic Total	
Trials:	1	
Period Overlay:	None	
End-of-Life Date:	Yes	11/30/02
Use Lift Factor:	Yes	
Use Like Item:	Yes	Nabisco at Pisquattuck-Speedy Rx at Boston-Planters Cashews Select New
* Like Item End Date:	11/30/02	
* Like Item Multiplier:	0.2	
Dates-		
History:	* Start: Rolling -19	* End: Rolling 0
Forecast:	* Start: Rolling 1	* End: Rolling 5
Save Cancel		

Using Interactive Demand

Interactive Demand allows you to modify policy parameters and immediately see the resulting forecast. You can also enter manual overrides to the statistically generated demand policy before saving the forecast.

Note:

If you do not have access to all the streams in the stream set associated with the Demand policy, you are not allowed access to the interactive functionality.

You can edit all the streams as per your access rights and editable rules of the streams in the Demand Interactive screen, but access to the interactive screen is not allowed if you have "Read Only" access to the "Output" (Forecast) stream.

If the output stream is a "measure" stream, and an aggregate Policy is processed through Interactive or Batch, you will get an error message, "No Disag Profile exists for one or more Periods".

The **Demand - Interactive** screen is where the historical and forecast data is displayed and edited. It functions the same as **Data - View/Edit** (in both table and graph mode), with the following exceptions:

- Only streams configured in the "demand stream set" are displayed. This helps limit the vertical size of the window.
- All interactive changes are stored temporarily, until the user chooses **Save All**, **Save Data Stream**, or **Save Policy**.
- Individual cells can be manually "locked" by the user. For instance, they make an override to a forecast value, and then "lock" the cell. If the statistical forecast is re-run, the new results will overwrite all the existing forecast results, except for the "locked" cell(s). Locked cells will be visually highlighted as locked. The user can also manually "unlock" the cell.
- Nulls are treated as follows:

- If there are nulls at the beginning of the series (i.e., the data starts at some point after the specified begin date), the series is truncated so that it starts when the data starts.
- If the nulls are internal to the series, they are converted to zeros before passing the series to the forecasting engine.
- If the nulls are at the end of the series, the nulls are truncated.
- Nulls in lift factors are given the value of "1".
- Nulls are handled the same way for batch forecast jobs.

Context Chooser - Parameter tab contains the date ranges, and the default parameters from the forecast policy. The default parameters can be modified according to the same rules used in the forecast policies. The date range is specified as described under Creating a Demand Policy.

Figure 11-7 Context Chooser - Parameter Tab

- **Method** – enter the method for the policy.
- **Smoothing Pre-Filter** – enter the smoothing pre-filter (if any) for the policy.
- **Seasonal Pre-Filter** – enter the seasonal pre-filter (if any) for the policy.

Note: Demand calculations may ignore your seasonal pre-filter selection (set either in the policy or the Interactive screen's parameter pane). If you recalculate in Interactive, the parameter screen may indicate that no transformation was done, even though you specified a seasonal pre-filter.

After generating a forecast, the Parameters tab also displays the following information:

- **Data Count** – a read-only display containing the total number of Forecast Points Requested, the number of Actual Forecast Points, the number of History Points Requested, and the number of Actual History Points. Actual History Points do not include certain periods with Null values. See [Nulls are treated as follows](#): for information on how Null Points/Periods are treated.

Example:

History data count: 21,19

Forecast data count: 6, 8

- **Completion Status** – a read-only display that shows the completion status of the forecast policy: OK, inadequate history, no history, less than req. history, other.

Context Chooser - Trial Data tab displays the results of the policy run. If a policy has not yet been run for this context during the current session, the values are blank.

Figure 11–8 Context Chooser - Trial Data Tab

Metric	Value	Description
Gamma:	0.0	
Trend Hold:	0.0	
Cyclic Decay:	0.0	
Alpha:	0.0	
Period Overlay:	None	
RMS:	0.0	
MAD:	0.0	
MAPE:	0.0	
Beta:	0.0	
Moving Period Decay:	0.0	
Method:	None	
Smoothing:	None	
Transform:	None	

There are no user actions on this tab - it is for display only. The results include

- Gamma – The seasonal parameter in Holt-Winters
- Trend Hold – The degree to which the trend has held steady in recent periods.
- Cyclic Decay – The degree to which cyclical effects in the data decrease over time.
- Alpha – The level parameter in Single Exponential Smoothing, Double Exponential Smoothing and Holt-Winters Exponential Smoothing.
- Period Overlay – The period overlay name selected. Default is "none".
- RMS (Root Mean Square Error) – A measure of the error between the forecast values and the actual values in the hold-out period - calculated as the square root of the average squared error.
- MAD (Mean Absolute Deviation) – Mean Absolute Deviation - a measure of the error between the forecast values and the actual values in the hold-out period - calculated as the average error in absolute value.
- MAPE (Mean Absolute Percent Error) – A measure of the error between the forecast values and the actual values in the hold-out period - calculated as the average percentage error.
- Beta – The trend parameter in Double Exponential Smoothing and Holt-Winters Exponential Smoothing.
- Moving Period Decay – The degree to which the trend has held steady in recent periods.
- Method – The forecasting method selected (i.e., linear regression, Holt-Winters, etc.) either by the user, or if the user selected "expert", then by the system.
- Smoothing – Type of smoothing used.
- Transform – Seasonal transform used.

To use the Demand Interactive feature

1. Set your context
2. Select **Demand - Interactive** and the following screen appears

Figure 11–9 Demand Interactive Screen

	10/13/03	10/14/03	10/15/03	10/16/03	10/17/03	10/18/03	10/19/03	10/20/03	10/21/03
Local									
SalesFostBase									
SalesFostProm									
Ship Forecast Adj									

3. Make your additions/changes. You can change/add values in the table as well as reconfigure parameters in **Context Chooser - Parameters**.
4. Click the appropriate button:
 - **Save All** – saves the policy and the displayed streams.
 - **Recalculate** – recalculates the data stream values based on your policy and history.
 - **Save Data Stream** – saves the changes to the displayed data streams in the table.
 - **Restore Policy** – resets the settings to match those saved in the permanent policy.
 - **Save Policy** – saves the current settings to the permanent policy.

Additional validations on date ranges include a comparison of the number of data points.

- If number of forecast periods is greater than the number of history periods, no forecast will be generated.
- If number of history periods less than three times the number of forecast periods, a forecast will be generated with a warning. Forecasts are most accurate when the number of history periods is greater than three times the number of forecast periods.
- If history contains nulls, you will receive a warning showing the number of nulls in the history period.
- If your "Forecast Start" date is not the current period, the message, "Warning: Adjusted Forecast Periods.", appears informing you that the forecast was adjusted to accommodate the new range.
- If there is a gap between your "History End" date and the "Forecast Start" date the current period, the message, "Warning: Adjusted Forecast Periods", appears informing you that the forecast was adjusted to accommodate the new range.

- If your history period contains nulls at the beginning or the end, the message, "Warning: Adjusted History Periods.", appears informing you that the history range has been truncated, as described above.
- If your history period contains nulls at the end, the message, "Warning: Adjusted History Periods. Warning: Adjusted Forecast Periods.", appears because the history period end nulls are added to the forecast period and both periods are adjusted.

Below is an example of a warning message in **Demand - Interactive**.

Figure 11–10 Example of a Warning Message in the Demand - Interactive Screen

Warning Message

Warning: Adjusted History periods. Adjusted Forecast periods.

	10/13/03	10/14/03	10/15/03	10/16/03	10/17/03	10/18/03	10/19/03	10/20/03	10/21/03
Local									
SalesFcastBase	15.00	20.00	30.00						
SalesFcastProm									
Ship Forecast Adj									

Any settings that are different than the permanent profile are highlighted as different.

Time-Aggregate Demand Forecasting

Time-Aggregate Demand Forecasting is designed to allow the user to specify time-aggregate granularity forecasting on any Oracle Retail VCC database. When this is specified, the base-period history is aggregated to the specified period overlay prior to being passed to the forecasting engine. The forecasting engine forecasts in terms of the period overlay buckets, and then logic in Oracle Retail VCC allocates the time-aggregate level forecast back into days. This is a useful approach for forecasting items where the history is intermittent, for instance DC withdrawals, which only tend to occur a few times per week or per month.

The period overlay used will have all periods included in the History Begin to Forecast End. The periods in the period overlay and period overlay items must be continuous in order to be used in Demand.

All base periods within period overlay items, where the user has specified history begin date, history end date, forecast begin date, and forecast end date, will be considered for time aggregation. However, forecast data stream items will be generated only at those base periods included in the forecast begin and end dates. If the history end and forecast begin dates fall within the same period overlay item, the history end will be adjusted to the previous period overlay item.

When Lift Factor is used for each time-aggregate bucket, the total history quantity is divided by the average lift factor for that time-aggregate bucket, prior to passing the data to the forecasting engine. For the purposes of calculating the average lift factor, any null values are treated as equal to 1.

If no lift factor is applied, total history quantity at each time-aggregate bucket is used. Nulls in time-aggregated history quantity will be treated the same way as at base periods.

When writing forecast data, the time-aggregate forecast quantity returned from the Geneva engine is divided by the number of base periods in the aggregate bucket.

If lift factor is specified, the forecast at each base period within the period overlay item is the product of the average forecast quantity at that base period multiplied by the lift factor for that base period. If lift factor is not specified, the forecast at each base period within the period overlay item is the average forecast quantity at that base period.

Batch Jobs

Demand Batch Forecast or Lift Factor jobs are used to create automated forecast or lift factor values for multiple demand policies. These jobs are configured through a tabbed screen including List and Create/Edit views.

The **Demand - Batch - List** screen (shown below) lists all batch forecast jobs at and below the currently selected context. The list is sortable by any of the data columns.

Figure 11–11 Demand - Batch - List Screen

Context

Local: Nabisco at Denver
 Partner: Wall Drugs at J'ville
 Product: Planters Holiday Pack

Product Name GIN LIN Folder

List Create

Displaying 1-2 of 2

	Local	Partner	Product	Sum	Type	Created By	Last Run
<input type="checkbox"/>	Nabisco at Denver	Wall Drugs at J'ville	Planters Holiday Pack	None	Demand Forecast	Dave Wilson	
<input type="checkbox"/>	Nabisco at Denver	Wall Drugs at J'ville	Planters Holiday Pack	None	Lift Factor	Dave Wilson	

Delete – deletes the batch forecast job when checked and **Apply Changes** is clicked. Click the Delete icon to select/deselect all items on the current page to be deleted. Click the individual check box to select/deselect that item to be deleted.

Edit (View) – displays an editable view at the context of the selected batch forecast job when the colored dot below the "Edit" icon is clicked.

Override Execute Time – overrides the execution time for batch forecast jobs when checked and **Apply Changes** is clicked. Click the Override icon to select/deselect all items on the current page to be overridden. Click the individual check box to select/deselect that item to be overridden.

Batch forecast jobs are executed based on the frequency you specify for each job. By selecting **Override Execute Time**, the job is executed the next time the Scheduler task for processing batch jobs runs, regardless of the frequency of the job.

Local – local name

Partner – partner name

Product – product name

Sum – sums leaf levels up wherever context was at folder level and "Aggregate On" was checked in the creation screen

Type – type of forecast; either Lift Factor or Demand Forecast

Created By – the user name of the user who created it

Last Run – the last update date and time

Creating Batch Requests

To create a batch forecast job

1. Set your context.
2. Click **Demand - Batch - Create**.
3. Enter the Date(s) and/or Time during which the Batch Request will run.
4. Select the Recurrence from the drop-down. This indicates the amount of time you wish to pass between each scheduled batch job. The default is "Once", which means this job will run only once. Other options include: Always, Daily, Weekly, Monthly.

Figure 11–12 Demand - Batch - Create Screen

The screenshot shows the 'Demand - Batch - Create' screen. At the top, the 'Context' section is highlighted in green. It displays the following information:

- Local:** Nabisco at Denver
- Partner:** Wall Drugs at J'ville
- Product:** Planters

 Below the context information, there are radio buttons for 'Name', 'GIN', and 'LIN', and a checked checkbox for 'Folder'. To the right of the 'Folder' checkbox is a search icon and a folder icon. Below this is a 'List' button and a 'Create' button. The main form area contains:

- Dates-** section with a red asterisk: * Start Date: 10/13/03 (with a calendar icon), Time: (with a clock icon), Any Time (checked), End Date: (with a calendar icon).
- Recurrence:** Once (selected in a dropdown menu).
- Aggregate On:** Product (checked in a checkbox).
- Job Type:** Demand Forecast (selected in a dropdown menu).

 At the bottom of the form are 'Save' and 'Cancel' buttons.

5. If your context has folder-level items, you will see check boxes for "Local", "Partner", or "Product" in the **Aggregate On** area. Aggregating on a context dimension will group into a batch all the policies at (but not below) that context dimension. If you do not check any of the boxes, Oracle Retail VCC will group into a batch all policies at and below the context. What you select here will display in the "Sum" column on the Demand - Batch - List screen.

If you see "None" displayed for the **Aggregate On** option, it is because you have selected a leaf-level context.

6. Select whether you wish the Job Type to be a Demand Forecast job or a Lift Factor job from the drop-down. Lift Factor will only be an option to those users who are using daily time buckets. For more information on Lift Factors, see [Using Lift Factors](#).
7. Click **Save**.

Demand Batch Request

Demand Batch Requests generate Demand forecast streams for every policy qualified by the Demand Forecast request based on "Sum On" attributes.

For each Demand Policy thus qualified, the forecast stream will be computed based on the stream set, the history and forecast dates defined in the policy.

See [Creating a Demand Policy](#) for details on how Demand Batch handles Use Like Item, History and Forecast Dates. Using Interactive Demand describes how Null values will be treated for History and Lift streams.

Lift Factor Batch Request

Lift Factor Batch Requests generate lift factor streams for every policy qualified by the batch Lift Factor request based on "Sum On" attributes.

Only Demand policies which have "Use Lift Factors" checked will be considered.

For each Demand Policy thus qualified, the Lift Factor stream will be computed based on the stream set, the history and forecast dates defined in the policy.

For details on the math involved in computing Lift Factors, see [Using Lift Factors](#).

Running Batch Requests with Scheduler Tasks

Demand Batch Requests can be run with either of the following two Scheduler Tasks:

- Run Demand Batch Requests
- Run Demand & Lift Factor Batch Requests

While running Scheduler Tasks' "Run Demand & Lift Factor Batch Requests", lift factors will be generated before going on to generating forecasts.

Lift Factor Batch Requests can be run with either of the following two Scheduler Tasks:

- Run Lift Factor Batch Requests
- Run Demand & Lift Factor Batch Requests

All completed scheduled tasks create an entry in the **Monitor - Jobs** screen detailing what the job contained, and its completion status.

Clicking on a scheduled task under the Job ID column brings up the job log for that job detailing the parameters (including policies, forecasts, error counts, etc.) that comprise the job. The table below lists the errors that can occur when your job is run.

Table 11–2 Batch Forecast Job Error Conditions

Error Message	Triggered When...
COMPLETION_FAIL_INAD_HIST	The number of history periods is less than the number of forecast periods.
COMPLETION_FAIL_NO_HIST	Either the input stream has no history data, or the input stream of an aggregate policy has no aggregate context data.
COMPLETION_FAIL_OTHER	An unknown error has occurred which doesn't meet one of the defined error conditions, usually during save. To determine the cause of the error, refer to the Demand log file generated in the Log Directory (defined in the VCC Configuration).

Table 11–2 (Cont.) Batch Forecast Job Error Conditions

Error Message	Triggered When...
COMPLETION_FAIL_FORECASTING_DISABLED	The method selected is disabled in the policy.
COMPLETION_FAIL_INVALID_OFFSET	The offset dates of the demand job fall outside the range of periods in the database.
COMPLETION_FAIL_INVALID_STREAMS	Either the demand streams configuration is incomplete in the stream set or there is no lift factor configured, and the policy uses the lift factor.
COMPLETION_FAIL_NO_DISAGG_PROFILE	The output stream does not have a valid disaggregation profile for the policy forecast periods.
COMPLETION_FAIL_PO_ALL_PERIODS_IN_SAME_ITEM	History begin and Forecast begin cannot both be in the same Period Overlay Item.
COMPLETION_FAIL_PO_LEAF_PERIODS_NOT_CONTIGUOUS	Invalid leaves in Period Overlay, either non unique base periods, or non contiguous base periods.
COMPLETION_FAIL_DATES_NOT_IN_PO_RANGE	Period Overlay range is less than the history begin to forecast end.
COMPLETION_FAIL_PO_ITEMS_NOT_CONTIGUOUS	Period overlay items in PO are not contiguous.
COMPLETION_FAIL_INVALID_HIST_START_PERIOD	Invalid History Start Date. History Start specified with 'is_rolling = true' is out of range.
COMPLETION_FAIL_INVALID_HIST_END_PERIOD	Invalid History End Date. History End specified with 'is_rolling = true' is out of range.
COMPLETION_FAIL_INVALID_FORECAST_START_PERIOD	Invalid Forecast Start Date. Forecast Start specified with 'is_rolling = true' is out of range.
COMPLETION_FAIL_INVALID_FORECAST_END_PERIOD	Invalid Forecast End Date. Forecast End specified with 'is_rolling = true' is out of range.

These error conditions can be found under Error Count in the log file. For more details on viewing a Batch Forecast Job Error log, see [Monitoring Oracle Retail VCC Jobs](#).

Using Lift Factors

Lift factors are used to indicate how each period compares to an "average" period. For instance, a popular dinner restaurant is typically busier on Friday and Saturday nights than on Monday and Tuesday nights. If an "average" day has a lift factor of 1.0, the busy days (Friday and Saturday, in this example) might have a lift factor of 1.5, while the slow days (Monday and Tuesday) have a lift factor of 0.7. This indicates that sales on Friday and Saturday are 1.5 times the average, while sales on Monday and Tuesday are 0.7 times the average. Lift factors are stored as a data stream, and can be used on both daily and weekly databases. On weekly databases, the data stream is edited directly. On daily databases, there is an additional interface to provide a convenient way to add, edit, and deploy manually entered lift patterns, as well as a way to calculate day-of-week patterns based on historical data.

Calculated Lift Patterns

Note: Time buckets must be configured for daily, rather than weekly, in order to access this feature.

History

The History selection calculates the lift pattern based on history. For each day, the value is the average for that day of week in the history period compared to all days of the week in the selected input period, according to the following formula:

Figure 11–13 Formula to Calculate History

$$History_{day} = \frac{Count_{all_periods}}{Count_{all_periods=day}} \times \frac{\sum_{all_periods=day} DataValues}{\sum_{all_periods} DataValues}$$

where the history day is equal to the count of all periods divided by the count of all periods equal to day times the sum of data values for all periods equal to day divided by the sum of data values for all periods (see below).

Figure 11–14 Definition of Terms Used in the History Calculation

Count _{all_periods}	= Total number of Days in a given period. Example: In a 7-Day Period, total number of Days = 7
Count _{all_periods = day}	= Total number of Days in a given Period. Example: Total number of Mondays in a 7-Day Period.
$\sum_{all_periods = day} DataValues$	= Data stream values for the number of periods for which History is being calculated. Example: For 2 Periods in a 7-Day Period, total value of 2 Mondays.
$\sum_{all_periods} DataValues$	= Sum of data stream values of all the periods in Count _{all_periods} .

Specifying Lift Patterns

Lift Patterns are specified very much like the way time-only disaggregation is specified, with a few exceptions.

Each week set has a "normalize" check box, which functions as follows: When the box is empty, the values entered in the edit boxes will be saved as-is. When the box is checked, the values entered in the edit boxes will be normalized so that their average is equal to 1.0. This is done by calculating their average, and dividing each number by the average, so that they maintain the same ratio to one another.

If "Normalize" is selected for a lift factor, and the sum of the values in a row total 0.0, the normalized values will be all of the initial values incremented by 1.0. In such an instance, the average will be 1.0.

This feature allows you to enter a week's worth of "actual sales" and then normalize the numbers instead of having to calculate the normalized ratios. For example, if you entered the following actual sales for the week:

Table 11–3 Actual Sales for the Week

M	T	W	T	F	S	S
192	164	157	185	124	329	401

Normalized to

Table 11–3 (Cont.) Actual Sales for the Week

M	T	W	T	F	S	S
0.87	0.74	0.71	0.83	0.56	1.49	1.81

There are cases where you may not want to normalize the values, for instance, a promotion week (shown in bold).

Table 11–4 Promotion Week

0.0	1.2	1.2	1.2	1.2	1.2	1.0
0.0	1.2	1.2	1.2	3.0	3.0	1.0

Finally, there are two date ranges entered on this page. The "Display Period" indicates which weeks to display. Since a database may contain several years' worth of weeks, this allows you to limit the display to the range of interest. Also the "History Period" indicates which periods to use for calculating the lift patterns based on history. The history calculation uses data from the stream set you specify.

To specify a lift pattern

1. Set your context.
2. Click **Demand - Lift Factor**, and the following screen appears.

Figure 11–15 Demand - Lift Factor Screen

3. Choose the Stream Selection set from the drop-down list.
4. Enter the **History Period - Start Date** and **History Period - End Date** in the text boxes, or click the calendar icon next to each box and select the dates from the pop-up calendar if you want to base the lift factors on history.
5. Enter the **Display Period - Start Date** and **Display Period - End Date** in the text boxes, or click the calendar icon next to each box and select the dates from the pop-up calendar.
6. Click **Set**, and the specified Display Periods appear. The first row contains normalized historical data for the history period (if one was selected). The remaining rows contain actual data in lift factor stream cells.

Figure 11–16 Demand Lift Factor Calculation Screen

Stream Set Name: Demand

History Period- Start Date: 05/01/02 (mm/dd/yy) End Date: 10/14/02 (mm/dd/yy)

Display Period- * Start Date: 07/29/02 (mm/dd/yy) * End Date: 10/20/02 (mm/dd/yy)

Start Date	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Normalize
07/29/02	0.22	0.24	1.60	1.60	1.60	1.60	0.15	<input type="checkbox"/>
08/05/02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
08/12/02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
08/19/02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
08/26/02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
09/02/02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
09/09/02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
09/16/02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>

Last Modified By: Dave Wilson Last Modified On: 10/14/02 17:12:37

Save All Periods in Display Range
 Save First Row for All Periods in Display Range
 Save First Row for All Periods

7. Make your modifications/additions.

8. Select the actions to be performed by clicking on one of the following radio buttons:

- Save All Periods in Display Range - this saves the values as shown for the display period. Note that the display period can be longer than what is actually on the screen at one time - you may need to scroll down to see the entire display period.
- Save First Row for All Periods - this copies the values in the first row to every week of the display period, and then saves.
- Save First Row for All Periods in Display Range - this copies the values in the first row to every week in the entire database.

Note: The earliest period that the **Lift Factor** screen will display is the first full week (starting with Monday) that exists in the database. If the database contains a partial week prior to the first full week, the partial week cannot be displayed. However, they can be manually edited from the **Data - View/Edit** screen.

9. Click **Save**.

This chapter consists of the following:

- [Introduction.](#)
- [Creating a Supply Policy.](#)
- [Using Interactive Supply.](#)
- [Using Supply Batch.](#)
- [Using the Safety Stock Feature](#)

Note: The Supply module is a separately priced option, and access to it as a menu item will only appear if you have obtained a Supply license.

Introduction

The Supply module allows customers and buyers to develop supply plans that meet target service levels.

The resupply function compares current inventory to planned consumption and expected receipts to determine supply needs. Ordering rules (from the Supply policies) are applied to generate a set of forecast orders to fulfill this need.

The data for starting inventory, planned consumption, and expected receipts is read directly from the corresponding data streams. The particular streams used are configurable in the **Company - Module Config - Supply** screen by the superadmin or admin.

The Supply module consists of six general areas:

- Policy – Business rules that specify parameters to use in both supply and safety stock calculation. Stored at leaf- or folder-level collaboration item.
- Interactive Planning – Interactive "what-if" supply planning of single collaboration items.
- Batch – Automatic supply planning of multiple items.
- Safety Stock – A utility that calculates the required safety stock.
- Stream Configuration – Specifies which streams to use in both the supply and safety stock calculations (see [Managing Supply Module Stream Set for a Company](#) for details).

- Shipping/Receiving Calendar – Specifies which days are valid for shipping or receiving. This feature is only available when you are using daily time buckets (see [Managing Supply Module Stream Set for a Company](#) for details).

The VCC Supply module is collaborative; both the buyer and seller have access to "what if" planning, commentary, and exception alerts for the products they trade. Graph and table displays provide effective decision support and analysis; users have a view that is customized to fit their company's perspective and their individual access rights.

Creating a Supply Policy

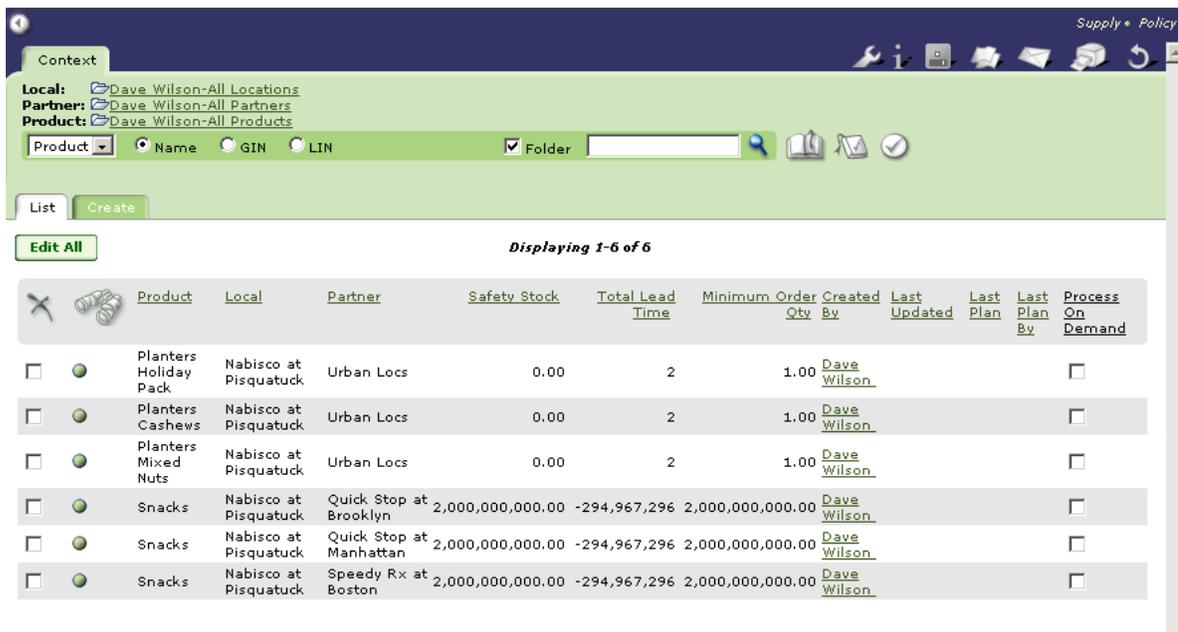
Supply policies contain collaboration-specific data relevant to the resupply calculation. Supply policies can apply at leaf-level and folder-level collaboration items. In order to use an aggregate-level supply policy, disaggregation profiles for each output stream and aggregates for each input stream are required for the period covered by the Plan Horizon.

Here are some specific rules about creating Supply policies:

- An **aggregate** Supply policy cannot be created with a Measure stream for an output stream. Output streams at aggregate level must be disaggregated, and Measure streams are not disaggregated. So, when attempting to save a policy, if the selected stream set has a Measure stream for Projected Inventory, Receipt FC, or Shipment FC, and the context has a sum on any dimension, you will receive an error message.
- Measure streams **cannot** be used as output streams for a leaf-level policy that uses a telescoping overlay, because accumulation across time would be required. However, Measure streams **CAN** be output streams for leaf level policies that do not use a telescoping period overlay because no disaggregation is required.
- Balance streams **cannot** be used for Receipt or Shipment Forecasts for a leaf- or aggregate-level policy that uses a telescoping overlay, because accumulation across time would be required and Balance streams cannot be accumulated across time.

The **Supply - Policy - List** screen (shown below) allows you to view, sort, and delete supply policies you have created at and below the currently selected context.

Figure 12-1 Supply - Policy - List Screen



- **Delete** – deletes the policy when checked and **Delete** is clicked. Click the Delete icon to select/deselect all items on the current page to be deleted. Click the individual check box to select/deselect that item to be deleted.
- **Edit (View)** – displays an editable view of the policy when the colored dot below the "Edit" icon is clicked.
- **Product** – displays the selected product.
- **Local** – displays the selected location.
- **Partner** – displays the selected partner.
- **Safety Stock** – displays the safety stock value if the policy is using fixed safety stock, or the words "from stream" If the safety stock values are coming from a designated stream in the stream set.
- **Total Lead Time** – displays the total order processing time and transit lead time combined.
- **Minimum Order Qty** – displays the minimum number of items that can be ordered.
- **Created By** – the user who created the policy. The user's name is a link. Click the name to Examine User.

Figure 12-2 Examine User



- **Last Updated** – the date that the policy was last updated.

- Last Plan – displays the date that the last supply plan for this policy was run.
- Last Plan By – displays the user that ran the last supply plan for this policy.
- Process on Demand – allows you to immediately process supply jobs. Not available for planners and reviewers.

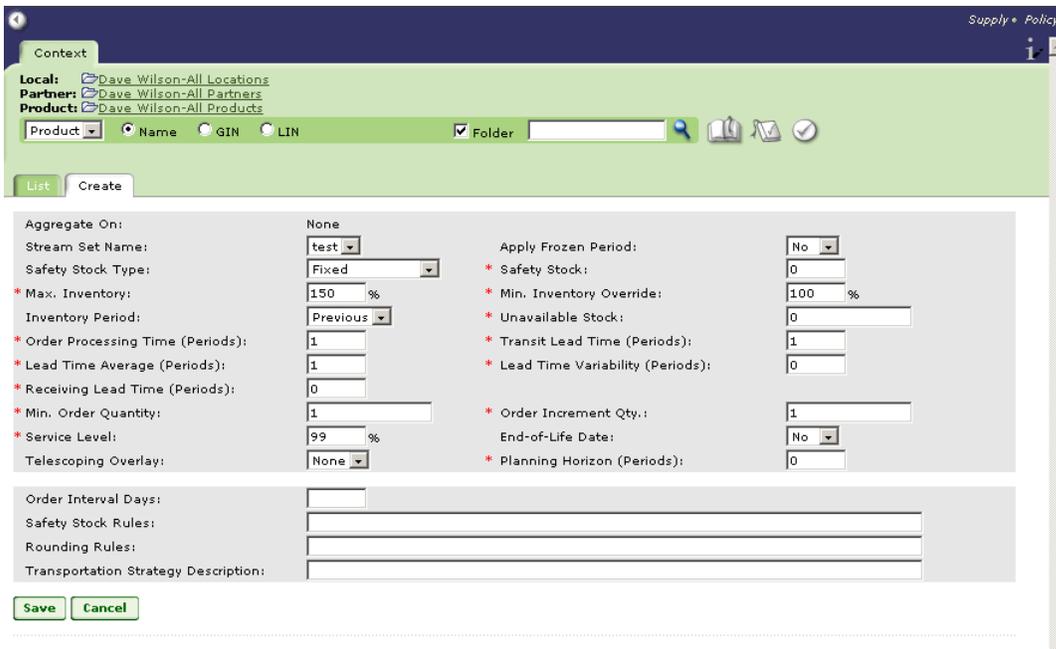
Note: One or more of the columns described above may be hidden depending on your settings in Preferences - Layout - Lists - Supply Policy.

Supply policies can be created at leaf-level and folder-level contexts. When creating/editing at the folder level, an "aggregate on" selector is displayed for each folder-level collaboration item that allows you choose whether the edits apply only to the currently selected folder or to all the contained leaves.

To create a Supply policy

1. Set your context.
2. Click **Supply - Policy - Create** and the following screen appears.

Figure 12–3 Supply - Policy - Create Screen



3. For each context dimension that is at folder level, an **Aggregate On** check box appears. Select the dimension(s) you want to aggregate on by clicking on the check boxes.
4. Select your stream set from the **Stream Set Name** drop-down list. The stream selections referred to are stream sets created in **Company - Module Config - Supply** (see [Managing Supply Module Stream Set for a Company](#) for details).
5. Select "Yes" from the **Apply Frozen Period** drop-down list if you want to take the Total Lead Time (sum of Order Processing Time and Transit Lead Time) into account in the supply calculation. Usually you will want to apply frozen periods.

For example, if you receive an order and your total lead time is 3 days (to process the order and get the physical shipment from here to there), then your customer cannot receive it until three days from now. This three-day period is the "frozen period". It is "frozen" because there is no way to change it. When you run a supply policy, you usually want to apply frozen periods, so that the system will not propose new orders inside the frozen period.

If, however, there is some way to expedite order processing, and your customer was going to be out-of-stock on this key item, you might NOT want to "apply frozen period". In this case Transit Lead Time is still applied, but Order Processing Time is not.

6. Select whether the safety stock type is "fixed" or "stream based" from the **Safety Stock Type** drop-down list. Alternatively, use the safety stock calculator to determine this number.

If you select "Fixed", enter the **Safety Stock** number. This number is the target inventory level for the item in terms of base units.

7. Enter the maximum inventory value in the **Max Inventory** text box. This is a percent value of safety stock to use as the maximum allowable inventory. This is used only to highlight items on the Interactive screen.
8. Enter the minimum inventory override value in the **Min Inventory Override** text box. This is a percent value of safety stock to use as the minimum allowable inventory. Resupply plans will be calculated to keep inventory above this value.
9. Select the inventory period from the **Inventory Period** drop-down list: either "Current" or Previous".
10. Enter the **Unavailable Stock** number. This is the number of inventory items that cannot be used but must be counted as part of the total.
11. Enter the **Order Processing Time** in base periods. This value is the Seller's required internal processing lead-time to get an order in-transit to the buyer.
12. Enter the theoretical **Transit Lead Time** integer in number of base periods. This value is the travel time between the seller location and buyer location. This is the value used in the resupply calculation.
13. Enter the **Lead Time Average** in base periods. This value is the average lead time (time between when you ship it, and when it arrives) over a period range. This is the value used in the safety stock calculation.
14. Enter the **Lead Time Variability** in base periods. This value is the standard deviation of the lead time over a period range. This is used in the safety stock calculation.
15. Enter the **Min. Order Quantity**. This value is the minimum quantity that may be ordered.
16. Enter the **Order Increment Qty**. After the minimum quantity, this value is the increment by which an order quantity may be increased.
17. Enter the **Service Level**. This is the target service level, which is a number from 80.0% to 99.9%, inclusive, expressed as a percentage. This is used in the safety stock calculation.
18. Choose whether you want an end-of-life date for the product by selecting Yes or No from the **End of Life Date** drop-down list. When Yes is selected, a text box appears where you can enter the end-of-life date. You may enter the date manually or by clicking the calendar icon. A pop-up calendar appears from which you can

select and double-click on a day to enter a date. If "Yes" is selected, no orders are created beyond the End of Life date.

19. Enter the **Telescoping Overlay**. None (default), or any telescoping overlay you have created or have access to. If an overlay is used, all results will be placed in the first bucket of each overlay period.
20. Enter the **Planning Horizon** in base periods. This value is the number of periods to perform supply planning. Null is not a valid planning horizon value. The planning horizon must be an integer (0 or greater).
21. The following four text fields are for user information only and are not used for the supply calculation:
 - Enter the **Order Interval Days** (i.e., number of days between orders). This number must be equal to or greater than 0.
 - Enter the **Safety Stock Rules**. This is a textual description of suggested treatment of safety stock (for example, whether minimum days of supply or service level should be used).
 - Enter the **Rounding Rules** (i.e., round up/round down).
 - Enter the **Transportation Strategy Description**, a textual description of suggested transportation strategy (e.g. preferred carrier, customer pickup, etc.).
22. Click **Save** to create the Supply Policy.

Using Interactive Supply

Interactive Supply allows you to create, edit, and view supply plans interactively. The **Supply - Interactive** screen shows the results of the resupply calculations, and allows you to edit a "temporary policy" that supersedes the permanent supply policy values. (Temporary policies are not saved as changes to the permanent profile unless you click the **Save Policy** or **Save All** buttons - they are transient values for the current interactive session only.) The temporary policy is initially populated with values from the permanent supply policy.

Note: If you do not have access to all the streams in the stream set associated with the Supply policy or if you have read-only access to one or more of the input streams, you are not allowed access to the interactive functionality.

When you are using **Supply - Interactive**, the **Context Chooser - Display Mode** screen displays the permanent supply policy values at the start of your interactive session, which can be changed.

Figure 12–4 Permanent Supply Policy Values

Parameter	Value
* Order Proc. Lead Time (Periods):	1
* Min. Order Qty.:	1.00
* Min. Inventory:	100.0%
* Transit Lead Time (Periods):	1
* Order Increment Qty.:	1.00
* Max. Inventory:	150.0%
* Receiving Lead Time (Periods):	0
* Safety Stock:	0.00
* Unavail. Stock:	0.00

- **b** – Percentage of Safety Stock to use as minimum allowable inventory. Number > 0%, < Max, Inventory. expressed as a percentage

- **Max Inventory** – Percentage of Safety Stock to use as maximum desired inventory. Number >100%, expressed as a percentage
- **Order Processing Lead Time** – Seller's required internal processing lead-time to get an order in-transit to the buyer. Integer ≥ 0
- **Transit Lead Time** – Travel time between the seller location and buyer location. Integer ≥ 0
- **Receiving Lead Time** – Time allowed for receiving prior to consumption. For example, if a chemical requires a 2-day quality assurance test after it is received, prior to allowing it to be consumed, the consumption plan is to use it on Wednesday, the material must be received on Monday. These additional 2 days would be the Receiving Lead Time. Integer ≥ 0
- **Min. Order Quantity** – The minimum quantity that may be ordered. Number ≥ 0
- **Order Increment Qty.** – After the minimum quantity, the increment by which that order quantity may be increased. Number > 0
- **Safety Stock** – Target inventory level for the item in terms of base units. If SS Type = "Fixed", then Number ≥ 0 , otherwise n/a
- **Unavailable Stock** – Unusable inventory that must be counted as part of total on hand. Number ≥ 0
- **Apply Frozen Period** – Takes Total Lead Time (sum of Order Processing Time and Transit Lead Time) into account in the supply calculation.

The projected inventory cells in the table are highlighted based on comparing the inventory to certain parameters:

- Blue – Projected ending inventory $<$ min inventory
- Yellow – Projected ending inventory $>$ max inventory
- Red – Projected ending inventory < 0
- Orange – Projected beginning inventory $<$ consumption forecast for the next period
- None – All other

Figure 12–5 Cells in the table highlighted based on the inventory compared to certain parameters

The screenshot shows the 'Supply Interactive' application window. At the top, there are tabs for 'Context' and 'Parameters'. The 'Parameters' section contains several input fields for supply policy settings:

- Order Proc. Lead Time (Periods): 1
- Min. Order Qty.: 1.00
- Min. Inventory: 100.0%
- Apply Frozen Period:
- Transit Lead Time (Periods): 1
- Order Increment Qty.: 1.00
- Max. Inventory: 150.0%
- Receiving Lead Time (Periods): 0
- Safety Stock: 0.00
- Unavail. Stock: 0.00

Below the parameters is a legend for inventory status:

- Inv. < Min. Inv. (Blue square)
- Inv. < Zero (Red square)
- Inv. > Max. Inv. (Yellow square)
- Inv. < Cons. Next period (Orange square)

Below the legend are buttons: 'Save All', 'Recalculate', 'Save Data Stream', 'Restore Policy', and 'Save Policy'. The 'Planning Horizon' is set to 5. The main table displays data for the following dates: 10/18/03, 10/19/03, 10/20/03, 10/21/03, 10/22/03, 10/23/03, 10/24/03, 10/25/03, and 10/26/03. The rows include 'Local', 'Sales Fcst Base', 'Sales Fcst Prom', 'Sales Fcst Seas', 'Ship Forecast Base', 'Ship Forecast Promo', and 'Ship Forecast Adj'. The 'Sales Fcst Base' row shows values: 333.00, 444.00, 555.00, 666.00, 777.00, 888.00. The 'Ship Forecast Base' row shows values: 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00. The 'Ship Forecast Promo' row shows values: 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00. The 'Ship Forecast Adj' row shows values: 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00. The 'Local' row is empty. The table has a 'Table' and 'Graph' view selector at the bottom left.

In addition to editing the values in the temporary profile, you can choose one of the following actions:

- **Save All** – saves the policy and the displayed streams
- **Recalculate** – recalculates the data stream values based on your policy

Note: The output stream values do not automatically recalculate when you open **Supply - Interactive**. To update values based on the current input streams you must click **Recalculate**.

- **Save Data Stream** – saves the changes to the displayed data stream(s) in the table
- **Restore Policy** – resets the settings to match those saved in the permanent policy
- **Save Policy** – saves the current settings to the permanent policy

The supply policy algorithm calculates a receipt forecast, a shipment forecast, and a projected inventory, with the following goals:

- The projected ending inventory for the buyer should be above the minimum safety stock defined in the policy.
- Projected receipt quantities should conform to the minimum and incremental order quantity parameters defined in the policy.
- Projected receipt dates should be allowed by the calendar for the receiving location, if applicable.
- Projected shipping dates should be allowed by the calendar for the shipping location, if applicable.

Note: All the streams in the **Supply - Interactive** screen can be edited as per your access rights and editable rules of the streams.

The calculation is iterative. It begins with the current day and continues forward for the number of days defined in the Plan Horizon parameter of the policy, or until the End-of-Life date occurs.

The calculation is always done at the base time buckets. If an overlay is selected, the base values are first calculated, then summed by an overlay period. The result is placed in the first base-period bucked of each overlay period.

Note: If you edit a stream, you must click **Save** prior to clicking **Recalculate** in order for you edits to be included in the recalculation.

Using Supply Batch

Batch supply jobs allow automated supply for multiple contexts. The **Supply - Batch - List** tab shows all Batch Supply jobs at and below the currently selected context. The list is sortable by any of the data columns.

Figure 12–6 Supply Batch Screen



Supply - Batch - List displays the following columns:

- **Delete** – deletes the supply batch job when checked and **Apply Changes** is clicked. Click the Delete icon to select/deselect all items on the current page to be deleted. Click the individual check box to select/deselect the item to be deleted.
- **Edit (View)** – displays an editable view at the context of the selected supply batch job when the colored dot below the "Edit" icon is clicked.
- **Override Execute Time** – overrides the execution time for the supply batch jobs when checked and **Apply Changes** is clicked. Click the Override icon to select/deselect all items on the current page to be overridden. Click the individual check box to select/deselect the item to be overridden.

Supply batch jobs are executed based on the frequency you specify for each job. By selecting **Override Execute Time**, the job is executed the next time the Scheduler task for processing batch jobs runs, regardless of the frequency of the job.

- **Product** – displays product component of the context.
- **Local** – displays location component of the context.

- **Partner** – displays partner component of the context.
- **Sum** – displays whether the policy is aggregated on a context dimension. If the policy does not aggregate on a dimension, displays "None".
- **Frequency** – displays selected frequency.
- **Created By** – displays the user name.
- **Last Updated** – displays the last update date and time.

To create a batch job

1. Set your context.
2. Click **Supply - Batch - Create**. The following screen appears:

Figure 12–7 Supply - Batch - Create Screen

The screenshot shows the 'Supply - Batch - Create' screen. At the top, there are two tabs: 'List' and 'Create'. Below the tabs is a 'Repeat frequency' section. It contains the following fields and options:

- Dates -**: Start Date: 10/29/03 (mm/dd/yy), End Date: (mm/dd/yy)
- Recurrence:** Monthly (dropdown), * Day (dropdown) of every (dropdown) month(s).
- Time -**: Start Any Time, Start At: (HH:mm)
- Aggregate On:** Local, Partner, Product

At the bottom of the form, there are two buttons: 'Save' and 'Cancel'.

3. Set the **Repeat Frequency**, or how often the batch job is to repeat, by selecting from the Recurrence drop-down. You can select either one-time or repeating calculations.
4. If your context has folder-level items, you will see check boxes for "Local", "Partner", or "Product" in the Aggregate On area. If there are no folder-level items, "None" will be displayed. If "None" is displayed, Oracle Retail VCC will group into a batch all policies (but not below) that context dimension. If you do not check any of the boxes, Oracle Retail VCC will group into a batch all policies at and below the context.
5. Click **Save**.

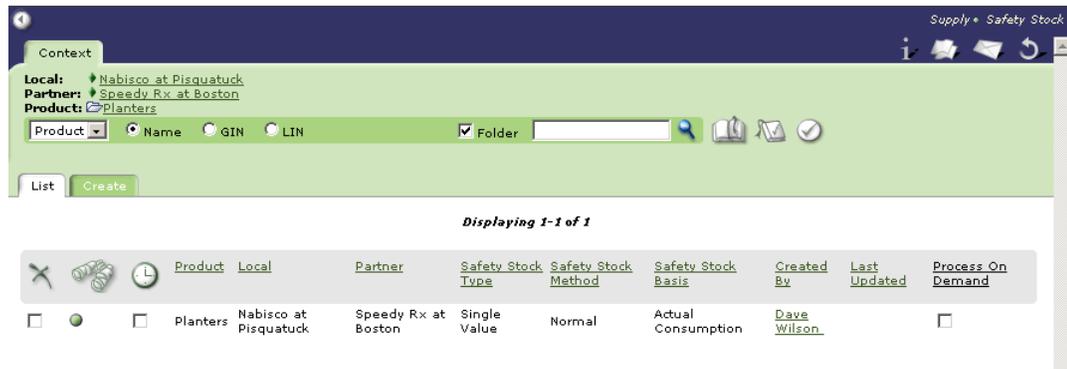
All other required parameters are read from the permanent supply policy. The job is executed by the Scheduler. A completed batch job creates an entry in **Monitor - Jobs**, with details about what the job contained, and the completion status.

Using the Safety Stock Feature

The Safety Stock feature provides an estimate of the inventory required to support a specified service level. For details about safety stock calculation, see [Safety Stock Calculation](#).

The **Supply - Safety Stock - List** screen shows all Safety Stock calculation jobs at and below the currently selected context.

Figure 12–8 Supply - Safety Stock - List Screen



The list can be sortable by any of the data columns. The following default columns are displayed:

- **Delete** – delete button appears if any are checked.
- **Override Execute Time** – overrides the execution time for the safety stock calculation jobs when checked and **Apply Changes** is clicked. Click the Override icon to select/deselect all items on the current page to be overridden. Click the individual check box to select/deselect the item to be overridden.

Safety stock calculation jobs are executed based on the frequency you specify for each job. By selecting **Override Execute Time**, the job is executed the next time the Scheduler task for processing batch jobs runs, regardless of the frequency of the job.

Note: Once a job has been scheduled and processed, you can view the job details in **Monitor Jobs** by clicking in the link for that entry's job ID number. See [Monitoring Oracle Retail VCC Jobs](#) for details.

- **Examine Details** – opens the edit view at the context of the selected Supply policy.
- **Product** – displays product name.
- **Local** – displays local name.
- **Partner** – displays partner name.
- **Safety Stock Type** – displays selected type: single value or time series.
- **Safety Stock Method** – displays selected method: Normal, Poisson, Period Supply - Forward, or Period Supply - Back.
- **Safety Stock Basis** – displays selected basis. Actual Consumption, Forecast Consumption, or Forecast Error.
- **Created By** – displays the creator's user name.
- **Last Updated** – displays the last update date.
- **Process On Demand** – allows you to process immediately an individual Safety Stock calculation job. You can only "Process On Demand" one job at a time. See [Processing Safety Stock Jobs On Demand](#). Not available for planners and reviewers.

Note: Once a job has been processed "On Demand", you can view the job details in **Monitor - Jobs** by clicking in the link for that entry's job ID number. See [Monitoring Oracle Retail VCC Jobs](#) for details.

The job is executed by the scheduler; similar to the way a report request is executed. A completed safety stock calculation job creates an entry in the existing "monitor", with details about what the job contained, and the completion status.

To configure the safety stock calculation

1. Be sure you have created a Stream Set. For details, see [Managing Supply Module Stream Set for a Company](#).
2. Set your context.
3. Click **Supply - Safety Stock Calc - Create**, and the following screen appears:

Figure 12–9 Supply - Safety Stock Calc - Create Screen

4. If your context has folder-level items, set the **Aggregate On** check box for "Local", "Partner", or "Product". If "None" is displayed, it is because your context has no folder-level items, and Oracle Retail VCC will group into a batch all policies at and below the context.

Aggregating on a context dimension groups into a batch all policies at (but not below) that context dimension.

5. Set the safety stock calculation value **Type** from the following radio buttons:

Single Value – calculates a single safety stock value for all future periods. Stored as a single value in the policy.

Time Series – calculates safety stock as a time series for a defined range of future periods. Stored in a stream.

6. Select the safety stock calculation **Method** from the drop-down list.

Normal – assumes deviation follows a normal distribution.

Poisson – assumes deviation follows a Poisson distribution. (Used for slow-moving items.)

Periods Supply - Forward – calculates safety stock as a fixed number of periods of forecast consumption.

Periods Supply - Back – calculates safety stock as a fixed number of periods of actual consumption.

7. Select the safety stock calculation **Basis** from the drop-down list.

Actual Consumption – uses mean and deviation of actual consumption as basis of calculation.

Forecast Consumption – uses mean and deviation of forecast consumption as basis of calculation.

Forecast Error – uses the forecast error as the basis of calculation.

8. In addition to specifying the type/method/basis options, you must specify certain parameters, which vary depending on the options selected. The table below outlines valid combinations, and the required parameters for each. Average Lead Time and Lead Time Standard Deviation are also required parameters where the default values are 1 and 0, respectively.
9. Enter the Repeat Frequency, or how often you wish the job to run. The default is for it to occur only once. If the Recurrence is set to repeat, supply the specifics for how often and when it will run.

Table 12-1 Safety Stock Calculation Parameters

Type	Method	Basis	Parameters
Single Value	Normal	Act. Cons.	History Range
		Forecast Cons.	Forecast Range
		Forecast Error	History Range, Error Estimator
	Poisson	Act. Cons.	History Range
		Forecast Cons.	Forecast Range
	Per Fwd	Forecast Cons.	Forecast Range, Periods Supply
Per Back	Act. Cons.	History Range, Periods Supply	
Time Series	Normal	Forecast Cons.	Forecast Range, Rolling Horizon
	Poisson	Forecast Cons.	Forecast Range, Rolling Horizon
	Per Fwd.	Forecast Cons.	Forecast Range, Periods Supply
	Per Fwd.	Actual Cons.	History Range
	Per Fwd.	Forecast Error	History Range, Error Estimator

Descriptions of the parameters are as follows:

Table 12–2 Description of the Safety Stock Calculation Parameters

Parameter	Description	Allowable Values
History Range	Range of historical data values	One-Time: Any range of periods in the DB prior to the current period. Repeating: Integer number of periods >0
Forecast Range	Range of future forecast data	One-Time Any range of periods in the DB from the current period forward. Repeating: Integer number of periods >0
Error Estimator	Method of estimating the forecast error	MAD = Mean Absolute Deviation, MSE = Mean Square Error
Periods Supply	Target inventory in terms of number of periods	Value > 0.
Rolling Horizon	Number of periods to use in rolling average	Integer number of periods > 0 and < number of periods in the Forecast Range.

10. Click Save.

Time Series, Periods Forward, and Actual Consumption jobs calculate future safety stock values based on automatic Periods of Supply. The Periods of Supply value is computed using the Single Value / Normal / Actual Consumption method.

Figure 12–10 Formula to Calculate Periods of Supply

$$\text{Periods of Supply} = \frac{\text{Safety Stock}}{\text{Average Demand}}$$

Time Series, Periods Forward, and Forecast Error jobs calculate future safety stock values based on automatic Periods of Supply. Periods of Supply value is computed using the Single Value / Normal / Forecast Error method. Formula used is the same as seen above.

Example:

Figure 12–11 Example for Periods of Supply

Service Level	95%	Service Level Factor:	1.6449						
Lead Time Average	3.0	Lead Time Variability:	2.0						
Period	-5	-4	-3	-2	-1	0	1	2	3
POS FC	109	98	91	94	105	104	109	108	102
Actual POS	104	95	92	100	102				
ABS FC Error	5	3	1	6	3				
MAD = (1/5)*sum(ABS FC Error for periods -5 to -1)					3.6				
Mean Demand = avg(Act POS for periods -5 to -1)					98.6				
Sigma-d = 1.25 * MAD					4.5				
Sigma = sqrt(mu-t*sigma-d^2 + mu-d^2 * sigma-t^2)					197.35				
Optimal Safety Stock SS = k * sigma					325				
Days Supply = SS / Mean Demand					3.3				
Future Safety Stock = sum(current + next 2 periods) + 0.3* 4th period						352	350	344	341

Safety Stock Calculation Rules

The following rules apply in the creation of safety stock calculations:

- Matching supply policies should exist in the database for the safety stock job request.
- If the safety stock job is created at an aggregate context by selecting aggregate on "None", it applies to all "at and below contexts".
- For Single Value jobs, the safety stock quantities are written into the supply policy, overwriting any previous value.
- For Time Series Type jobs create safety stock streams based on the edit rules of the safety stock stream selected in the Stream Set.
 - If the policy is at leaf level, the safety stock writes into the stream tables (Based on the Revision History of the safety stock stream).
 - If the Policy is at aggregate level, the safety stock stream is a "Non Measure" stream, and the exact matching disagg profile exists, the safety stock writes into the stream tables (Based on the Revision History of the safety stock stream).
 - If the policy is at an aggregate level, and the safety stock stream is a Local Measure stream, the safety stock writes into the Aggregate table.
 - If the safety stock stream is not a Local stream, then the safety stock records cannot be created. The job errors out.
 - If the job is beyond the End of Life (EOL) period, the safety stock value is zero.
- Nulls at the beginning, end, and in between the data are ignored for computation of Average and Standard Deviation.
- For a Poisson distribution method, the number of trials (x') should not be greater 40 and the computed safety stock quantity is rounded up. Apply this method where the data is very small.

For safety stock formulae descriptions for each type, method and basis, see [Safety Stock Calculation](#).

Processing Safety Stock Jobs On Demand

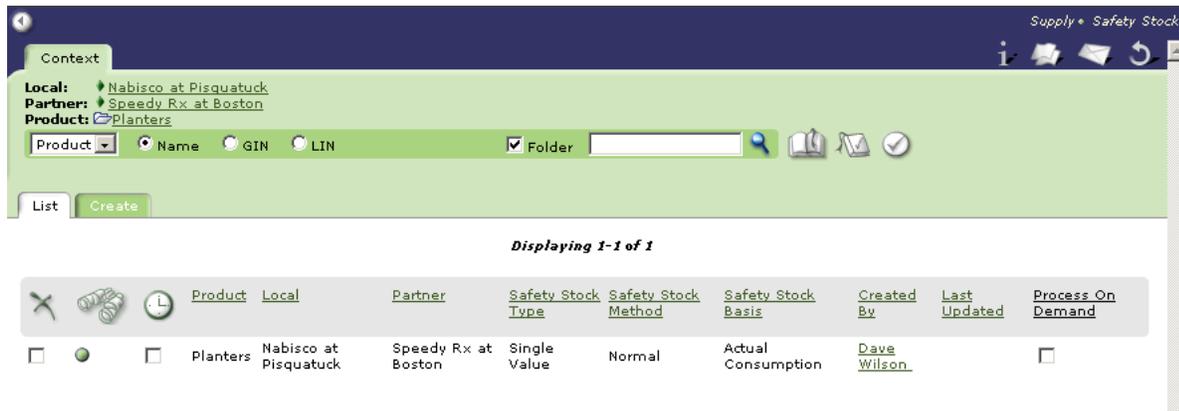
Access to this feature: superadmin, admin, manager, and supervisor.

Safety Stock job processing occurs as a background task controlled by the Oracle Retail VCC Scheduler (see [Managing the Scheduler](#)). You can, however, process a single Safety Stock job "on demand" without having to schedule and execute the task through the scheduler. This is called on-demand Safety Stock job processing. It allows you to process one Safety Stock job and view the results immediately.

To process a single Safety Stock job "on demand" without having to schedule and execute the task through the Scheduler

1. Set your context.
2. Click **Supply - Safety Stock - List** from the Oracle Retail VCC menu.

Figure 12–12 Supply - Safety Stock - List Screen



3. Check the "Process On Demand" box next to the Safety Stock job that you want to process.
4. Click **Process Selected Items**.

Part III

Value Chain Collaboration Administration

Part III consists of the following chapters:

- [Introduction to VCC Administration](#)
- [Server-Level Configuration and Management](#)
- [Managing Company General Information and Preferences](#)
- [Master Data](#)
- [Managing Company Module Configuration](#)
- [Creating Product Price Profiles](#)
- [Managing Company Aggregates](#)
- [Managing Company Data Stream Disaggregation](#)
- [Managing Company Collaborations](#)
- [Managing Roles and Users](#)
- [Managing the Monitor](#)
- [Managing the Scheduler](#)
- [Managing Company Data Purges](#)
- [Managing Company UOM Factors](#)

Introduction to VCC Administration

This chapter includes the following topics:

- [Administration Overview](#)
- [About the Company Chooser](#)
- [Starting and Stopping Oracle Retail VCC.](#)
- [Where To Begin](#)

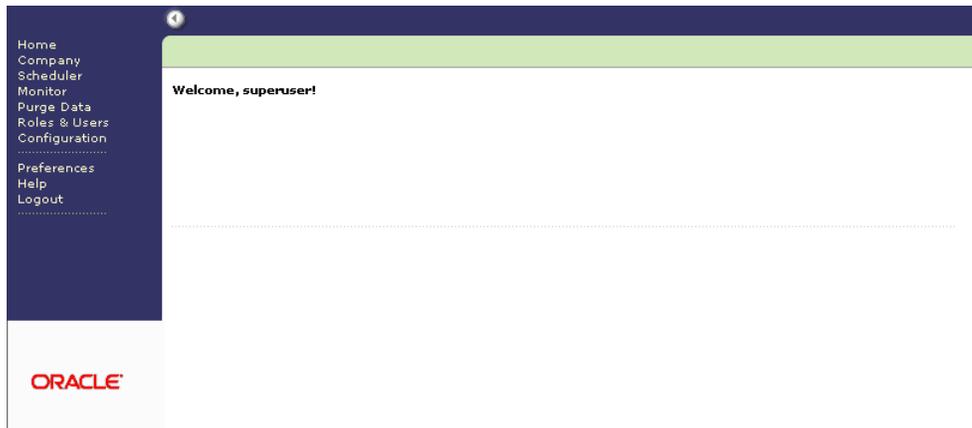
Administration Overview

The Oracle Retail VCC administrator tasks allow you to create and manage the information required by VCC. In most cases, the Integrator is the most efficient way to set up the VCC and enter your data. You then can use the Administrator to verify and edit your data.

There are several administrative roles in Oracle Retail VCC including server admin, superadmin, limited admin, and admin. Each role has specific functions for Oracle Retail VCC configuration and management. (For details on the functions each role can perform, see [Managing Roles and Users](#) or [User and Role Permissions](#).) In addition, a superuser is supplied that allows you to create users and assign them to specific roles.

The Superuser

Oracle Retail VCC is supplied with a superuser account. The user name is "superuser" and the default password is "lemonyellow". The superuser is charged with setting up the overall environment that affects all companies on the server. The superuser screen shown below is the screen every superuser sees when they log in.

Figure 13–1 Superuser Welcome Screen

The superuser role has exclusive access to

- Company creation. The superuser must create all companies that will do business on the server.
- The Configuration screen (not to be confused with the specific Company - Configuration pane) in the Oracle Retail VCC menu allows the superuser to modify attributes of the data streams available to all companies, specify the Oracle Retail VCC program modules that can be used by all companies, set up links that are displayed in the Links menu, specify the language to be used, and configure billing usage report information.
- Time period creation. The superuser must create the time periods to be used by companies on the server.
- Database purge functions. Company administrators can submit purge requests to the superuser to purge their transaction data. The superuser can also purge all master data (hierarchy folders) that has been placed in recycle bins.

The Server Admin

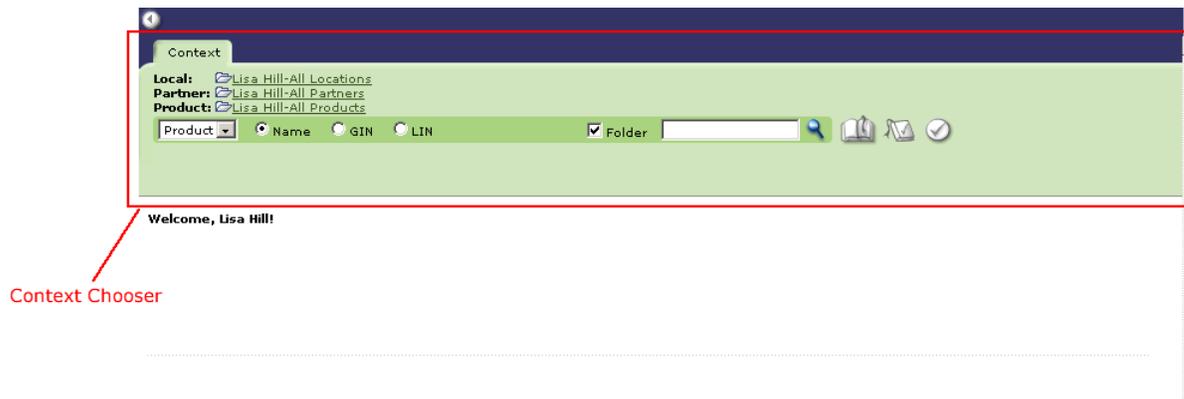
The server admin has the same access rights as superuser, with only one exception. The server admin cannot create other superusers or server administrators. All other roles can be created by the server admin. Refer to The Superuser for full details.

The Integrator User

In addition to the superuser and server admin, an Integrator user role exists with the username "integratoruser" and the default password "pinkrhino". The Integrator user is independent of any company and cannot log in to the Client. The Integrator user is the default user for the VCC Integrator and is allowed to load data for all companies.

The Administrators

There are three types of company-specific administrators in VCC superadmin, limited admin, and admin. The only function to which the superadmin has exclusive access is the VCC Scheduler, which is used to schedule various Oracle Retail VCC jobs that cannot be performed in real time. The screen shown below is similar to the screen a superadmin sees when they log in. for details on the context chooser, see [Context Chooser](#).

Figure 13–2 Context Chooser Area for a Superuser

The functions you can perform as a Oracle Retail VCC company administrator include:

- Editing your local company information including product folders and leaf nodes, location folders and leaf nodes, and trading partner location folders. This is called your master data. You can enter master data using the administrator tasks or the VCC Integrator. In most cases, the Integrator is the most efficient way to enter large amounts of this type of data.
- Creating aggregates. Aggregates allow you to group individual leaf nodes in a hierarchy into a single unit so you can treat the individual leaves in the hierarchy as a unit. For example, if you have a category called "Toothpaste" that has several types of individual toothpaste types in it, you can aggregate it and treat the category as one unit.
- Creating collaboration items between your company and a trading partner company.
- Creating price profiles, which allow you to set the base price for products.
- Managing roles and users for your company.
- Creating disaggregation profiles, which are used to perform disaggregation (the opposite of aggregation). The disaggregation profile allows you to set up the ratios used when allocating an aggregate number across individual leaves.
- Configuring, links, time period overlays, and other general configuration parameters for your company.
- Submitting purge requests that are executed by a superuser or server admin.
- Monitoring job processing.

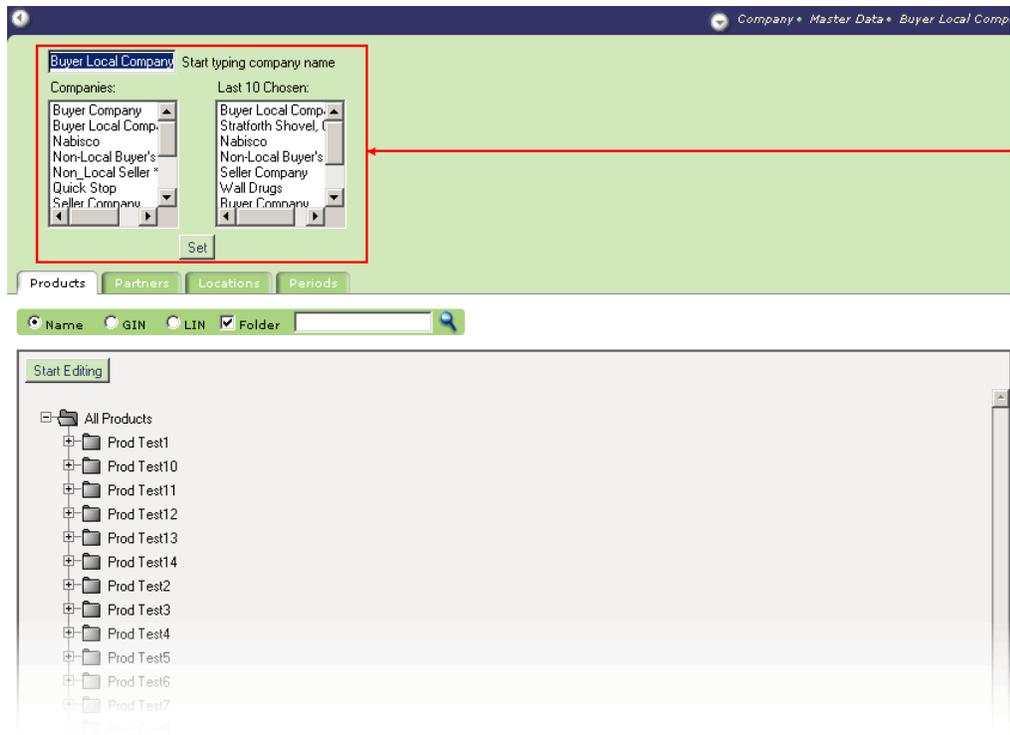
For a complete list of user and role assignments, see [User and Role Permissions](#).

About the Company Chooser

The Company Chooser screen allows you quick access to any company to which you have access so you can edit or administer its information. The Company Chooser screen is available from all administrative screens to a superuser, server admin, or an administrator by clicking the arrow in the top right-hand corner of the screen or by clicking the company name link in the title bar. Superusers and server admins can see their own company and partner companies; the superadmin role, admin role, and the manager role can see only their own company.

For example, in the Master Data screen below, if you click on the arrow in the title bar, the Company Chooser screen appears.

Figure 13–3 Master Data Screen



Note: To print all the data in the printer friendly view you may have to change the browser page setup to landscape by selecting "landscape" from the browser's File - Page Setup menu.

Starting and Stopping Oracle Retail VCC

To start Oracle Retail VCC

1. Select **VCC - VCC Server - Start** from the VCC program group.
2. Enter the following URL in your browser:

http://hostname/Syncra_instance_name/jsp/login.jsp

The following login screen appears:

Figure 13–4 Login Screen

3. In the **login** screen enter "superuser" and the default superuser password (lemonyellow).

You can use the default password initially to log in and then you can change the password. For details on creating new users and roles, see [Managing Roles and Users](#).

4. Click **Login**. The Oracle Retail VCC Home page for the superuser role appears.
5. To exit Oracle Retail VCC, click **Logout**. If you do not log out of Oracle Retail VCC using the **logout** button and your session is idle, your session information is maintained until it expires (the default is 15 minutes). If you return before your session information has expired, Oracle Retail VCC continues your previous session.
6. To stop Oracle Retail VCC, go to the VCC program group and select **VCC - VCC Server - Stop**.

Where To Begin

Before you can begin to import data into Oracle Retail VCC, you must configure VCC and create a basic framework for it that includes creating all companies, creating hierarchy folders and leaf nodes that will contain your data, creating time periods, and users; and other basic configuration information.

These functions are divided between the superuser, super admin, and the administrators (superadmin and admin). The superuser has the responsibility for the overall configuration of Oracle Retail VCC for all companies; the administrators are responsible for company-specific configuration.

To create a framework with Oracle Retail VCC, follow the guidelines below. The steps outlined are not hard and fast rules. As you become familiar with the Administrator, you might choose to perform some actions before or after others. The guidelines are meant to help and give you a basic road map for getting started. They follow the topics detailed in subsequent chapters.

Superuser Responsibilities

On a new VCC installation, the superuser is the only user in the System and it is her responsibility to "set up" VCC and provide the environment in which companies can collaborate. As superuser, your first duties are to

1. Create all trading partner companies that will exist on the server. You can create companies only through the Administrator Create tool.

2. Create users. Company administrators can also create users for their specific companies.
3. Assign the Oracle Retail VCC modules for each company.
4. Configure all data stream types and assign them to specific companies as appropriate.
5. Configure the languages that will be available to user.
6. Configure billing and usage report monitoring.
7. Create server-level links.
8. Execute purge requests (that is, purge data) when submitted by company administrators.

These tasks are further described in See [Server-Level Configuration and Management](#).

Administrator Responsibilities

Administrators (superadmin and admin) are responsible for company-level administration and configuration. They do not have access to any superuser functions. There is no specific order in which initial administrative functions are performed. As a recommendation, you might

1. Configure your company's general preferences. This includes revising a company name and ID, if applicable; managing the automatic creation of collaboration items; managing freeze periods; managing the display period for balance streams.
2. Create users, assign them to roles, and give them access control.
3. Manage company-level links.
4. Manage company period overlays.
5. Configure optional fields for promotional events.
6. Add the products on which you intend to collaborate. You can add them manually or import them in batch mode. Batch mode is the preferred method for large numbers of products. For more information about batch mode loading, see the *Oracle Retail VCC Implementor Guide*.

Once you have added your products, you can create product folders and group the products within them. Specifying folders creates a hierarchy that you can expand and collapse in the VCC Client.

7. Create price profiles for products.
8. Create your company locations and trading partner locations. You can add them manually or import them in batch mode (see the *Oracle Retail VCC Integrator Guide*). For details for adding them manually, see [Managing Company Collaborations](#). Once you have added your company locations, you can create location folders such as "Northeast" and group all northeast locations within that category.
9. Add your trading partners.
10. Create your collaborations. This allows you to specify individual collaborations between your company locations and those of your trading partners, and includes the products contained in each collaboration. Oracle Retail VCC allows you to enter them manually using the Oracle Retail VCC Administrator, or bulk load your collaborations using the Oracle Retail VCC Integrator's Collaboration Parser. For details, see [Creating Collaborations Between Trading Partners with the](#)

[Company Collaborations Screen](#). For details on bulk loading collaborations, see the *Oracle Retail VCC Implementor Guide*.

11. Create aggregates, if applicable. For details, see [Creating a Data Aggregate with the Company - Aggregates - Create Tab](#).
12. Schedule your tasks to execute using the Oracle Retail VCC Scheduler (superadmin only).

Server-Level Configuration and Management

This chapter contains the following topics:

- [About Server-Level Configuration](#)
- [Managing Company Creation](#)
- [Creating a Company with Company - Create](#)
- [About Oracle Retail VCC Program Modules](#)
- [Configuration - Modules Tab](#)
- [About Data Stream Types and Data Streams](#)
- [About Accumulation Rules](#)
- [Configuration - Stream Types Tab](#)
- [Managing Links](#)
- [Managing Users and Roles at the Server Level with the Roles and Users Screen.](#)
- [Managing Data Purging with the Purge Data Screen.](#)
- [Managing Time Periods for All Companies](#)
- [Configuring a Language for Oracle Retail VCC with the Configuration - Language Tab](#)
- [Configuration - General Tab](#)
- [Renaming Labels](#)
- [Setting Export Compression Size](#)
- [Setting the Usage Statistics E-mail Notification in the Billing Tab](#)
- [Purging Transaction Data, the Job Monitor Log File, Current Connections, Event Promotions, Exceptions, Collaboration Item Comments and Master Data.](#)

About Server-Level Configuration

Server-level configuration includes all tasks that must be performed by the superuser or server admin. Server-level configuration tasks affect all companies doing business on the server. A superuser/server admin can perform most functions a company administrator (superadmin and admin) can perform, but a superuser/server admin cannot configure price profiles or disaggregation for a company.

Server-level superuser and server admin tasks include

- Company creation.

- The Configuration screen (not to be confused with the specific **Company - Configuration** pane) in the VCC menu that allows the role to create data streams available to all companies, specify the Oracle Retail VCC program modules that can be used by all companies, create links, specify the language to be used, and configure billing usage report information.
- Time period creation.
- Database purge functions.

Each is described below.

Once you create the companies whose users will log on to this server, company administrators can perform all company specific configuration and management including

1. Defining **master data** for the company, which includes products; your trading partners; your company locations; time periods. You can create master data manually using the administrator tasks, or you can load master data from a file (see the **Oracle Retail VCC Implementor Guide**).
2. Creating collaborations.
3. Creating Price Profiles, which sets the base price for each product.
4. Creating aggregates, if applicable.
5. Creating company roles and users. A superuser/server admin also can create users and assign them to roles for specific companies.

To facilitate information loading, you have the option of loading your product, partner, and location information from a file. If you have a large amount of data to load, you should prepare these files before you begin defining company information. For details see the **Oracle Retail VCC Implementor Guide**.

Managing Company Creation

A superuser or server admin must create all information for all companies using the administrator tasks before you begin using the companies in collaborative relationships.

Once you create companies, you can begin creating the frameworks for the companies you created. When your company or trading partner information changes, you must make the changes using the administrator tasks.

The company information you must define for your company includes

1. Your company name.
2. Whether the company is a **local** company (users of this company log on to this server) or not.
3. Whether your company is a buyer or seller in the collaboration.
4. Your company ID (a DUNS number or any other ID).
5. The name you want to assign to the highest level in your hierarchy (root) for locations, partners, products, and periods.

Creating a Company with Company - Create

Access To This Feature: Superuser, server admin

To create a company

1. Log in as "superuser." You can only create company information if you are logged in as "superuser."
2. Click Company - **Create** from the VCC menu. The **Create Company** screen appears.

Figure 14–1 Create Company Screen

3. From the Local drop-down list, select "Yes" if you are creating a company whose users will log on to this system. Select "No" if you are creating a partner (non-local) company whose data resides on a separate database.
4. In the **Role** field, click **Seller** or **Buyer** depending on your company's role with its partner.
5. Enter the company name in the **Company Name** field.
6. Enter the company ID or DUNS code (DUNS codes are assigned to a company by Dun and Bradstreet) in the **Company ID** field. (DUNS code are in the following format including hyphens: **nn-nnn-nnnn**.) A company ID can be from 1 to 40 alphanumeric characters.
7. Select the the type of Company ID you entered in Step 6 from the ID Type drop-down. Standard options include: GLN, DUNS, DUNS_PLUS_FOUR, SCAC, SELLER_ASSIGNED, BUYER_ASSIGNED, UN_LOCATION_CODE.
8. Assign an alternate company ID in the Alternate ID field (optional). If an Alternate ID is entered, partners will be able to view the ID, though its primary purpose is for internal company use.
9. If you entered an Alternate ID, Select an ID Type from the drop-down.
10. Enter the Location, Partner, Product, and Period Roots, or keep the default roots, "All Locations". Roots are the names assigned to the highest level in the company hierarchy for locations, partners, products, and periods. Keep in mind that you will not be able to assign user access to the company root folder for locations, partners, or products. If you want to assign access to the highest level folder to a user or users, you should create a "dummy" root folder below the default root folder to which you then can assign user access. This will allow you, for example, to create aggregates at the root (All) level that users can view in the Client.

11. Click **Create**. The company name now appears in the **Companies** list within the **Company Chooser** screen and you can configure its master data and other company-related information.
12. To access the newly created company from the **Company Chooser**, click **Company - Master Data** from the VCC menu and then click on the triangle icon in the upper right corner of the screen. The Company Chooser opens. Double click on it to set it as the company on which you are working. You can also
 - Click on a company name, the name is displayed in the text field, click **Set**.
 - Begin typing a name in the company name field, it is highlighted in the **Companies** list, click **Set**.

Once you create a company, company administrators can configure company-specific parameters.

About Oracle Retail VCC Program Modules

Oracle Retail VCC can implement up to nine modules depending on your company's license. The modules include

- Reports – allows you to generate various types of reports to show the nature of the collaboration between you and your trading partners.
- Data – Time series supply chain data. The data can represent various metrics, such as forecast, actual inventory, goods in transit, etc. In addition, the data can be provided on a daily, weekly, or monthly basis. Oracle Retail VCC provides over 100 predefined data streams that you can name and customize according to your needs. Each data stream is comprised of up to 3 substreams and a total substream. You can request new data streams from Oracle Retail VCC, and maintain revision histories for all data streams.
- Events – allows Admin and end users to create Promotions on Products between trading partners.
- Metrics – allow you to track key performance indicators.
- Exceptions – allow you to be notified when a data stream varies beyond user-defined thresholds.
- Extract – allows you to extract information from your database and export it into a third-party application.
- Demand – creates base forecasts by applying statistical algorithms to historical time series.
- Supply – allows customers and suppliers to develop supply plans that meet target service levels.

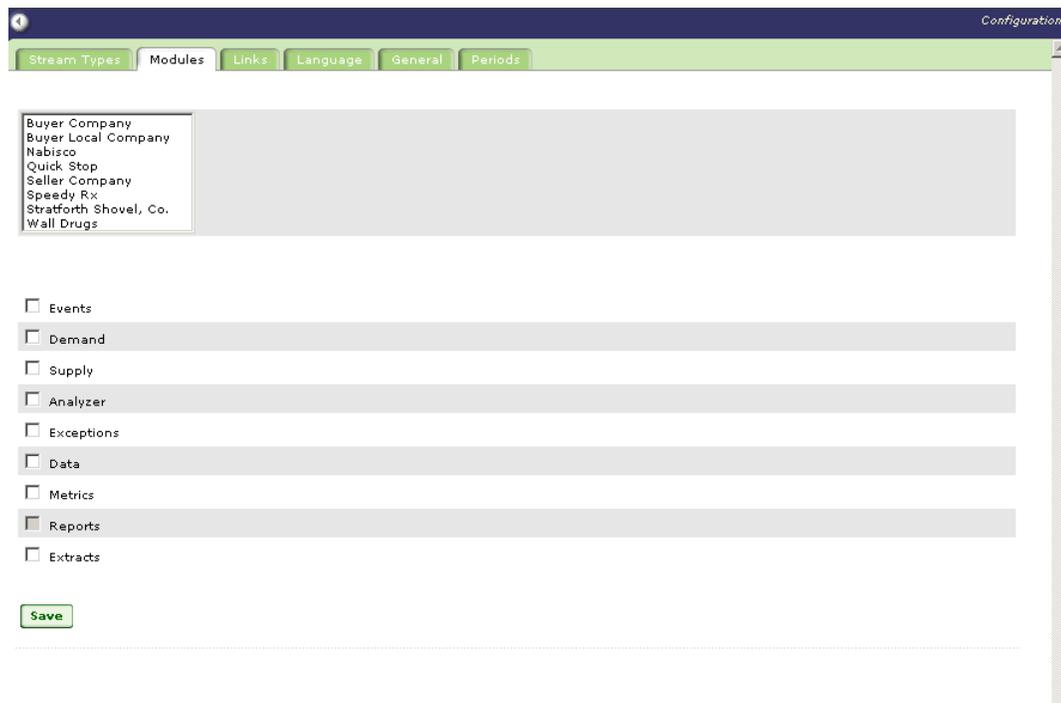
Configuration - Modules Tab

Access To This Feature: Superuser, ServerAdmin

To specify which modules a specific company can use

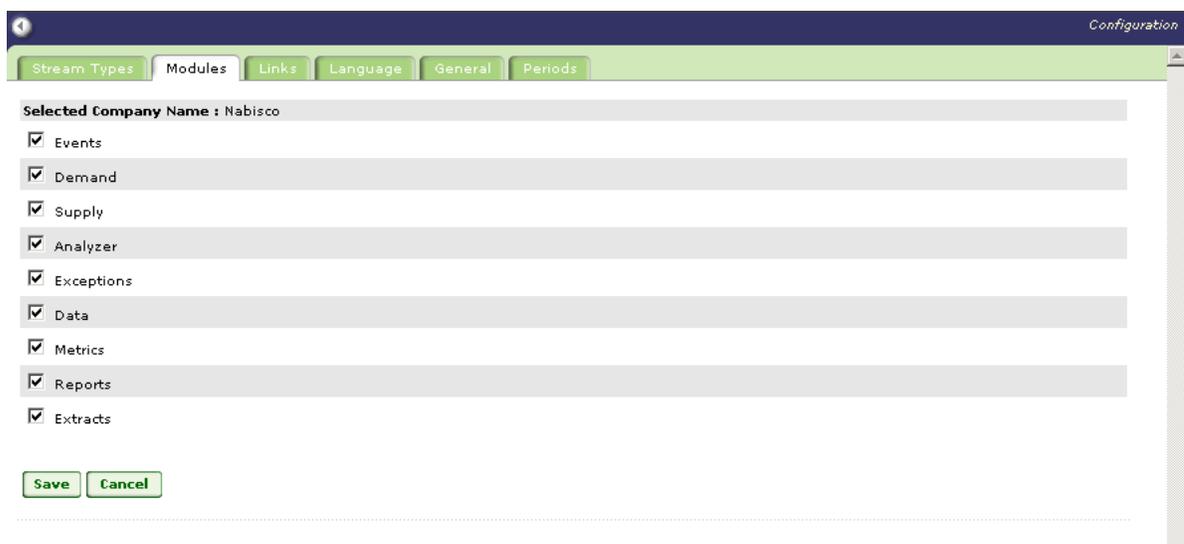
1. As superuser, click **Configuration** from the VCC menu. The **Configuration** screen appears.
2. Click the **Modules** tab. The **Modules** screen appears.

Figure 14–2 Modules Screen



3. Highlight a company or multiple companies for which you want to assign modules.
4. Select the check boxes next to the module you want active for the company.
5. If you select a single company, click the **View Selected** button. The modules assigned to that company appear. You can assign or unassign modules.

Figure 14–3 View and Assign Modules



6. Click **Save**.

About Data Stream Types and Data Streams

A **Data Stream Type** is a configured group of fixed and modifiable attributes that define the way you can view and manipulate data in Oracle Retail VCC. When a Data Stream Type is combined with a set of time-series data, it is called a **Data Stream**.

You can create, view or edit a Data Stream (depending on your role) when

- The agreed-upon time series Period hierarchy is established and available to the trading partner companies.
- The Data Stream module is licensed to the user's company.
- The Stream Type is assigned to the user's company.
- Hierarchies for the context items Product, Partner, and Local are established and available to the administrators in the Master Data screens for each trading partner company.
- Collaborations are established between the user's company's contexts and its trading partners' contexts.
- Access rights to the contexts are assigned to the user.

Oracle Retail VCC provides over 100 data stream types. Each Data Stream Type contains fixed attributes and modifiable attributes. If none of the existing stream types can be modified to meet your requirements, additional stream types can be created.

Fixed attributes include

- Stream Type Code – An ID that allows sorting and helps to identify the stream type/data stream in the database and elsewhere in Oracle Retail VCC.
- Accumulation Rule – Each Stream Type is governed by one of three accumulation rules: Movement, Balance, or Measure. This rule indicates how data in the Data Stream behaves if and when its context and/or time series is aggregated and how that affects the types of exception criteria you can create for it. For details, see [About Accumulation Rules](#).
- Number of Subtypes – Each Stream Type has a fixed number of subtype substreams; either one, two, or three. If there are two or three subtypes, there will be a Total substream included as well.

Modifiable attributes include

- Revision History – Defines whether or not the stream type will maintain a revision history when data is changed in any of the subtypes in the Data - View.
- Edit When – Defines whether or when substreams can be edited in the Data - View. Choose among the options: Never, Past, Future, or Always.
- Edit By – Indicates which trading partner "Status", Buyer or Seller, will be able to create and edit in the Data Stream.
- Name – Name of the stream.
- Description – Description of the stream.

There is a third designation called "Year-ago" that becomes accessible for each substream when the "Edit By" attribute has been defined to be either Buyer or Seller. Under that condition, a check box for Year-Ago will appear next to each substream. If you select the option, then a data stream containing year-ago data for the subtype can be viewed by the end-user.

Note: When established as a trading partner in Oracle Retail VCC, each company is assigned a trading status of either Seller or Buyer depending on its position in collaborations.

About Accumulation Rules

The Accumulation Rule is a fixed attribute of the Stream type that indicates how data in a Data Stream behaves if and when its context and/or time series is aggregated, and how that affects the types of exception criteria you can create for it.

See [Managing Company Aggregates](#) for additional details regarding context aggregates.

There are three accumulation rules that can apply to a Stream Type/Data Stream: Movement, Balance, and Measure.

- A **Movement** stream can accumulate data across context dimensions (product, partner, and local) and across time dimensions (period time series).

View across the context by establishing aggregate streams for combinations of context leaf levels and category levels.

View across time by establishing an overlay of groups of the periods contained in your time series. Period overlays can be used to view across time for leaf or aggregate forecasts.

Any kind of exception criteria can be created for a movement stream.

- A **Balance** Stream can accumulate data across context dimensions (product, partner, and local) but not across time dimensions.

View across the context by establishing aggregate streams for combinations of context leaf and category levels.

When a balance stream is viewed in a period overlay, the value displayed will be the value listed in either the first or the last period contained in the range of the periods specified in the period overlay.

Value entered into Balance Stream Period Overlays will be disaggregated to 1st or last.

The Balance Stream first or last configuration is defined in Company - General Config - Preferences. See [Managing Company General Preferences](#).

Admins override the First/Last configuration in Company - General Config - Stream Type by selecting its "Fill Bucket". The value entered into period overlays will be placed in each underlying period.

A "sum" exception criteria on Periods cannot be created for a balance stream.

Note: Movement and Balance aggregates may be editable if there is a Disaggregation Profile existing for the specified periods or, if no periods for the specified stream type have a Disaggregation Profile, and, the Proportional Disaggregation option is set to Yes (in **Company-General Config-Preferences**). You must also adhere to the current Stream Type configuration attributes for 'Edit By' and 'Edit When'. You can load values manually or can get data using the Integrator.

- A **Measure** stream cannot accumulate data across context dimensions (product, partner, and local) nor across time dimensions (period overlays).

Unlike the aggregates formed for Movement and Balance streams, Measure stream aggregates are not computed by summing the individual items included in the selected aggregate level folder. They are simply values that exist at the folder level.

Measure stream aggregates are editable according to the current Stream Type configuration attributes for "Edit By" and "Edit When." You can enter values manually or by using the Integrator.

Similar to the aggregates stored for Movement and Balance streams, both current and previous values are stored at the aggregate level for Measure streams.

When a Measure stream is viewed in a period overlay, there will be no values displayed.

A "sum" exception criteria on Periods cannot be created for a Measure stream.

Disaggregation profiles cannot be created for Measure streams.

Configuration - Stream Types Tab

Access To This Feature: Superuser, server admin

To modify stream type attributes

1. Click **Configuration** in the VCC menu. The **Configuration** screen appears. (Note that you can click any column heading to sort the list by that attribute.)
2. Click the **Stream Types** tab. The **Stream Types** screen appears listing current data streams. On this screen you can
 - click any column heading to sort the list by that attribute
 - refresh the screen by clicking the refresh icon
 - print the screen by clicking the print icon

Figure 14-4 Stream Types Tab

Stream Name	Stream Type	Accumulation Rule	Revision History	Edit by	Edit When	Substreams
Actual "Sales"	2	Movement	No	Buyer	Past	2
Actual Shipments	43	Movement	Yes	Seller	Past	2
Aged Inventory	104	Balance	Yes	Buyer & Seller	Always	3
Available to Promise	49	Balance	No	Buyer & Seller	Always	1
Average POS	106	Measure	No	Buyer	Past	1
Base Unit Factor	124	Balance	Yes	Buyer & Seller	Future	1
Calculated Stream 1	126	Measure	No	Buyer & Seller	Never	1
Calculated Stream 10	135	Measure	No	Buyer & Seller	Never	1
Calculated Stream 2	127	Measure	No	Buyer & Seller	Never	1
Calculated Stream 3	128	Measure	No	Buyer & Seller	Never	1
Calculated Stream 4	129	Measure	No	Buyer & Seller	Never	1
Calculated Stream 5	130	Measure	No	Buyer & Seller	Never	1
Calculated Stream 6	131	Measure	No	Buyer & Seller	Never	1
Calculated Stream 7	132	Measure	No	Buyer & Seller	Never	1
Calculated Stream 8	133	Measure	No	Buyer & Seller	Never	1
Calculated Stream 9	134	Measure	No	Buyer & Seller	Never	1
Canceled Orders	83	Movement	No	Buyer & Seller	Past	1
Capable to Promise	103	Balance	No	Seller	Always	1
Capacity	52	Movement	No	Seller	Always	1
Category Rank	67	Measure	No	Seller	Future	1

- Click the colored dot under the binocular icon next to the stream type you want to modify (or view). The data stream **View/Edit** screen appears that allows you to change the characteristics of any stream type.

Figure 14-5 Data Stream View/Edit Screen

Examine Stream Type

Type: Actual "Sales"

Name: Actual "Sales" Stream Type: 2

Description: Actual point-of-sale item movement

Sub-Types:	Long Name	Short Name	Show Year Ago	Real Time Export
	ActualSales;Base	ActSales;Bas	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Base point-of-sale item movement			
	ActualSales;Promo	ActSales;Pro	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Promotional point-of-sale item movement			
Total:	ActualSales-Total	ActSales-Tot	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Total point-of-sale item movement			

Accumulation Rule: Movement

Maintain Revision History

Create/Edit By:
 Buyer & Seller Buyer Seller

Streams-View Edit When:
 Never editable
 Editable in the future
 Editable in the past
 Always editable

Assigned To:
 Buyer Company
 Buyer Local Company
 Nabisco
 Quick Stop
 Seller Company

Buttons: Save, Revert, Back

4. Select a stream Type from the pulldown.
5. In the **Name** field, enter a name for the data stream or change the data stream name if required.

The name change is reflected in the Stream Type drop box and anywhere the Stream Type is listed throughout Oracle Retail VCC. DO NOT CHANGE THE MEANING of the stream when changing a stream name. Use the existing subtype descriptions and review the other attributes to discover the purpose of the stream.
6. In the **Description** field, enter a new description name if the current one does not apply.
7. In the **Subtypes** fields, you can enter a new long name, short name and description in the fields provided. For example, if you have a stream type called "Sales," you may want to have a subtype called "Store Sales" and another called "Catalog Sales."

After saving name changes, areas where the stream/substream is listed immediately reflect the revisions.
8. If the data stream subtype supports totals you can rename the **Totals** field by entering an alternate name in the **Totals** field and you can enter a new description name. For example, if you have a stream type called "Sales," a subtype called "Store Sales" and another called "Catalog Sales," you might want to rename the total substream to "Total Sales."
9. Check the **Maintain a Revision History** check box if you intend to keep a record of each time changes are made manually or by 'data loading' to the Data Stream, and/or if you want allow end-user ability to create exception criteria based on a **generational offset**. A generational offset allows end-users to compare a current Data Stream with any with any previously saved Data Stream histories. A list and details of the histories will be accessible in the Revision History screen.
10. In the **Created/Edited by** section, choose the appropriate radio button option. Click **Buyer & Seller** if valid users from both the buyer and the seller trading partner companies can edit in this Data Stream. Click **Buyer** if valid users from only the buyer trading partner companies can edit in this Data Stream. Click **Seller** if valid users from only the seller trading partner companies can edit in this Data Stream.

When either Buyer or Seller is selected, the substreams display an option to establish "Year-Ago" substream designations for the subtypes. Under that condition, a check box for **Year-Ago** appears next to each substream. If you select the option, you can view a data stream containing Year-Ago data for the subtype.
11. In the **Streams-View Edit When** section choose the appropriate radio button option. Click **Never Editable** if editing in the Data - View is not to be allowed under any circumstance for any user. Click **Editable in Future** if editing in the Data - View is only to be allowed in future time periods by valid users. Click **Editable in Past** if editing in the Data - View is only to be allowed in past time periods by valid users. Click **Always Editable** if editing in the Data - View is only to be allowed in both past and future time periods by valid users.
12. The **Assigned to** field, lists the trading partner companies who are assigned this stream.
13. Check the **Real Time Export** box for each data stream that, after changes are made in the **Data - View/Edit** screen, will automatically "export" the changes to a file after you press the **Save** button. The Real Time Export file will be located on the machine where the Server is installed in directory **Integrator\Exports\Realtime**

or in the directory as configured in the **Realtime Export File Path** in **VCC Configurations - Server**.

14. If you want to modify another data stream, select it from the **Type** drop-down list and modify it.
15. Click **Save**.

Assigning Data Streams With Configuration - Stream Types - Assign

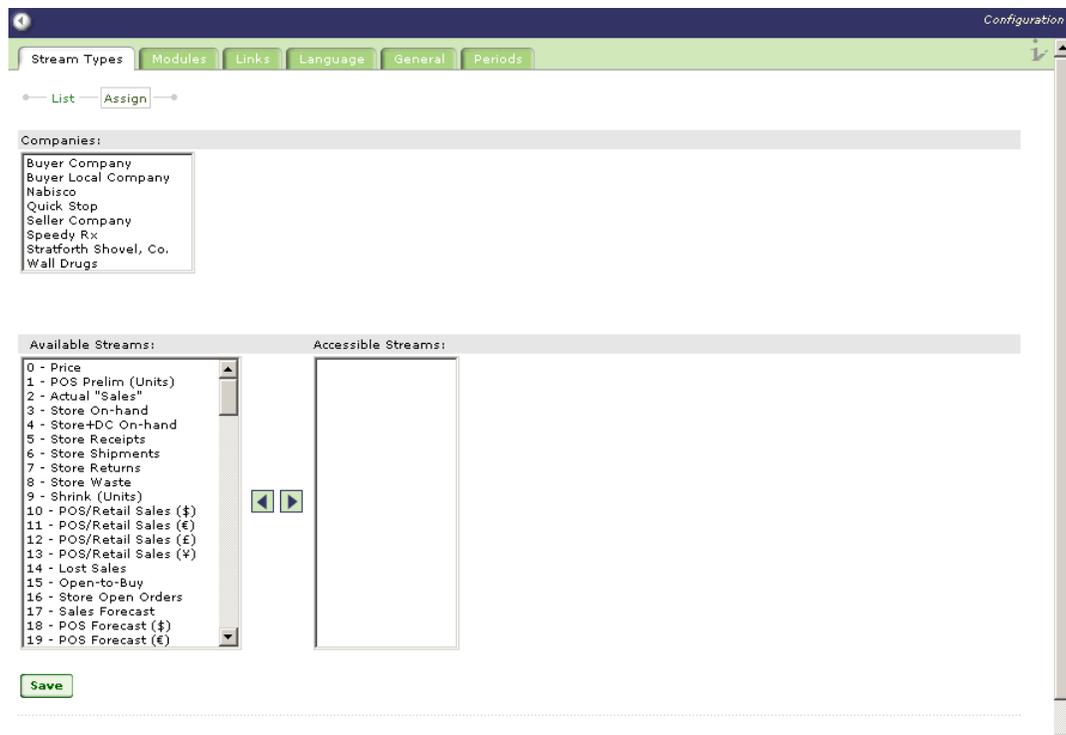
Access To This Feature: Superuser, ServerAdmin

You must assign data streams to a company. When you assign a stream type to a company, a data stream for each subtype becomes available to the end-user in both the primary and secondary designations (where "primary" indicates the first of the two comparators) to allow data streams viewing and editing within the Comparison modes (Local Current to Partner Current; Local Current to Local Previous; and Partner Current to Partner Previous).

To assign data streams to a company

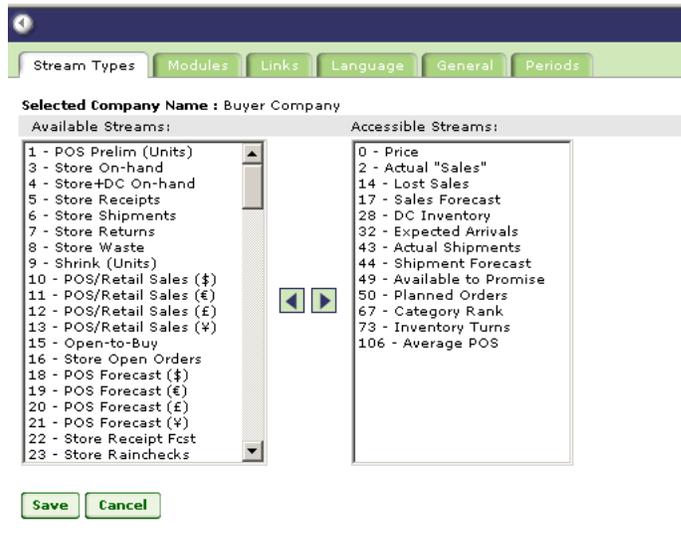
1. As superuser or serveradmin, click **Configuration** in the VCC menu. The **Configuration** screen appears that includes all data streams supported by Oracle Retail VCC.
2. Click the **Stream Types** tab. On the **Stream Types** pane, click **Assign** in the upper right-hand corner. The Assign Streams screen appears.

Figure 14–6 Assign Streams Screen



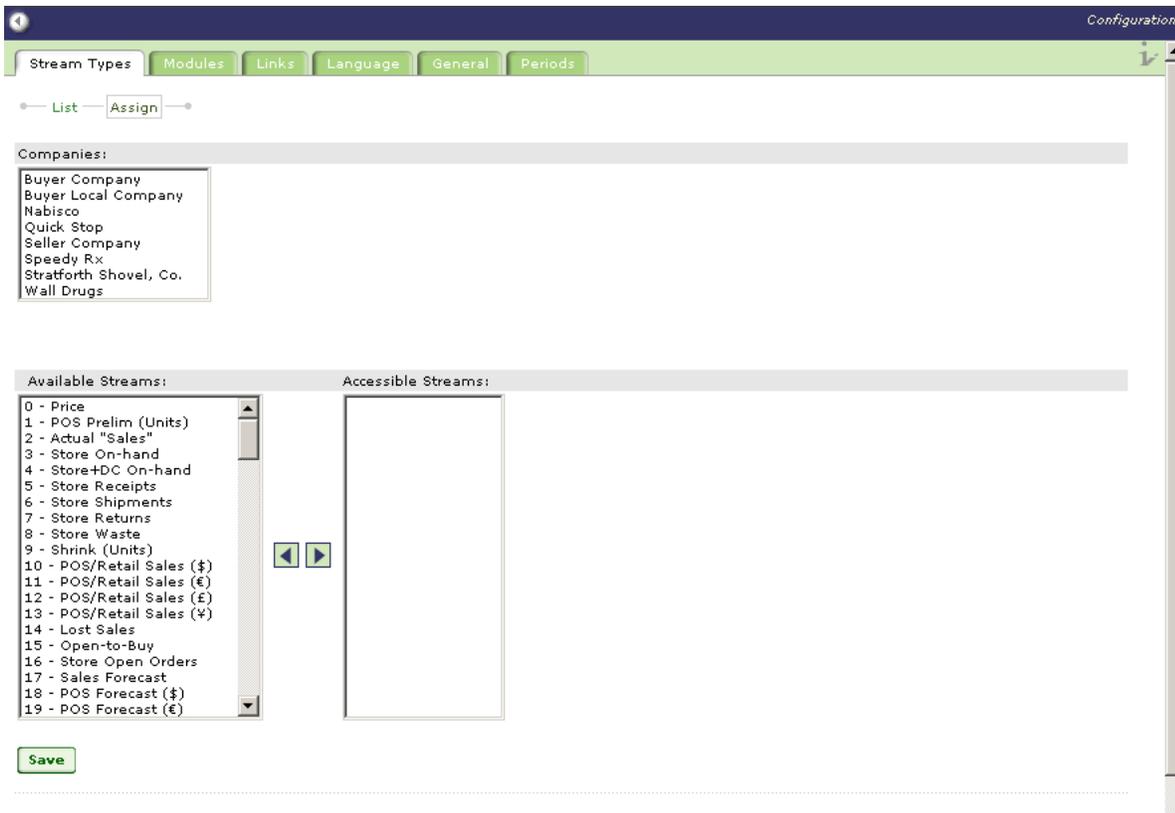
3. Highlight a company or multiple companies (by holding down the Ctrl key and clicking the companies) in the **Company** box and click **View Selected**. (Note that **View Selected** only displays after you have selected a company.)

Figure 14–7 Stream Types Tab



4. Move the streams you want to assign to the company by highlighting a stream in the **Available Streams** box and moving it to the **Accessible Streams** box.
5. Click **Save**. When you view the stream, the company name appears in the **Available Streams** list box.

Figure 14–8 Stream Types Tab - Assign Section



Note: If a stream type is unassigned from a company and/or its users, pre-existing configurations may be affected. For example, if the unassigned stream had been defined for an existing Metrics or Report configuration, it may be replaced by another stream type by default, and results will not be as expected. Administrators should alert end-users to check for and modify their configurations before unassigning a stream type.

Creating Data Stream Types

Access To This Feature: Superuser, ServerAdmin

If the existing stream types are not sufficient, additional stream types can be created. This is accessed through Configuration -> Stream Types -> Create. All the parameters described above can be set for the new stream type. Stream names must be unique, and stream ID's will be automatically assigned by the system. Once a new stream is created, it can be assigned to companies and users in the same way as any other stream.

Managing Links

Access To This Feature: Superuser, Server Admin, SuperAdmin, Admin

A superadmin can create a link for any company on the Server to any Web site, which then appears under **Links** in the VCC menu.

Configuring Links with the Configuration - Links Tab

To create a link for a company

1. Select **Company - Configuration** from the Syncra Xt menu.
2. From the **Configuration** pane, click the **Links** tab. The **Links** screen appears.
3. Select a company from the Company Chooser, if necessary. To add a link, click **Add**. The **Add a New Link** screen appears.

Figure 14–9 Add a New Link Screen

4. In the **Link Name** field, enter a name for the link that will appear under Links in the VCC menu.
5. In the **URL** field, enter the URL for the link.

Be sure you have entered the entire URL (including "http://"); otherwise the link will fail. To avoid problems, click Test Link to make sure the URL you have entered is valid.

6. Click **Save**.

Editing a Link

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

To edit an existing link

1. Select **Company - Configuration** from the VCC menu.
2. From the **Configuration** pane, click the **Links** tab. The **Links** screen appears.

Figure 14–10 Link Screen



3. Select a company from the Company Chooser, if necessary. Highlight the link you want to edit and click **Edit**. The **Update Link** screen appears.

Figure 14–11 Update Link Screen



4. In the **Rename Link** field, enter a new name for the link if required.
5. In the **URL** field, enter the new URL if required.
6. Click **Save**.

Deleting a Link

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

To delete an existing link

1. Select **Company - Configuration** from the VCC menu.
2. From the **Configuration** pane, click the **Links** tab. The **Links** screen appears.

Figure 14–12 Links Screen

3. Select a company from the Company Chooser, if necessary. Highlight the link you want to delete, and click **Delete**.

Hiding Links

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

To hide an existing link or make a hidden link visible

1. Select **Configuration** from the VCC menu to hide links for all companies on the Server; select **Company - Configuration** to hide links for a specific company.
2. From the **Configuration** pane, click the **Links** tab. The **Links** screen appears.

Figure 14–13 Links Screen

3. Select a company from the Company Chooser, if necessary. Highlight the link you want to hide, and click the arrow to move it into the **Hidden** category. To make a hidden link visible, click the arrow to move it into the **Visible** category.

Managing Users and Roles at the Server Level with the Roles and Users Screen

Managing users involves tasks that include:

- [Selecting the Appropriate Tree Display](#)
- [Roles & Users Search](#)
- [Creating Users](#)
- [Setting and Editing User Access Control](#)
- [Examining a User](#)
- [Disabling a User](#)

- [Moving a User to a New Role](#)
- [Changing a User Password](#)
- [Copying a User](#)
- [Designating a System User](#)

Oracle Retail VCC defines the following roles into which you can group users:

- **Serveradmin**– permits access to all administrative functions except creating price profiles and disaggregation profiles. A serveradmin can create companies, create users and assign them to roles at any level, purge data, and access all local trading partners. Username "superuser" is created by default. All other subsequent serveradmin users must be created by the superuser and will have the same privileges as superuser (except creation of user roles at or above serveradmin level).
- **Superadmin**– permits access to all administrative functions. A superadmin, however, cannot create a company or purge data, can only schedule task events, and create price profiles and disaggregation profiles for his own company and roles below his own level.
- **Admin** – permits access to all administrative functions except the Scheduler, creating a company, and purging data. An admin can only create price profiles and disaggregation profiles of his own company and roles below his own level.
- **Supervisor** – In addition to planner and manager privileges, can create users, aggregates, and disaggregation profiles.
- **Manager** – permits read-and-write access to Oracle Retail VCC and allows you to create exception criteria and metrics.
- **Planner** – permits read-and-write access to Oracle Retail VCC to create and edit data streams, and create promotional events. A planner has read-only access to exception criteria and metrics.
- **Reviewer**– permits read-only access to Oracle Retail VCC.

For details on the functions each role can perform, see [User and Role Permissions](#).

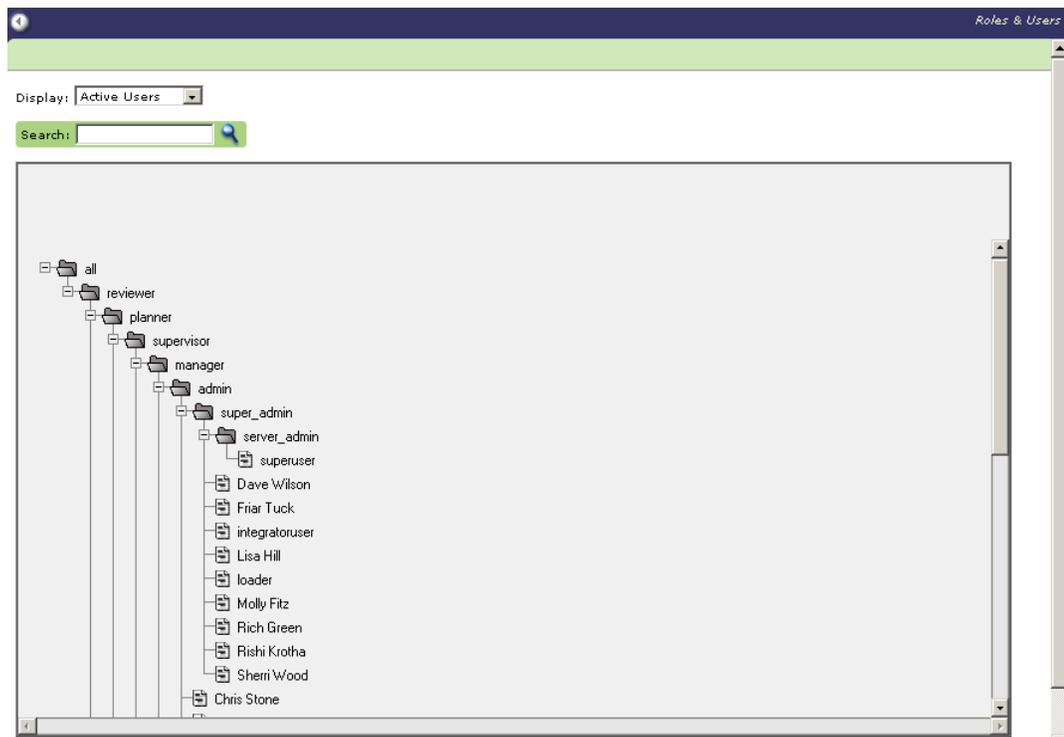
Selecting the Appropriate Tree Display

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

The user tree defaults to show Active Users, which are users who currently have access control and can log in to Oracle Retail VCC. Users who have been disabled will appear in a separate user tree.

In order to access the disabled user tree

1. Select Company - Roles & Users from the menu
2. Choose Disabled Users from the Display drop-down. The Disabled Users tree appears.

Figure 14–14 Disabled Users Tree

For details on how to disable a user, see [Disabling a User](#).

Roles & Users Search

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

Roles & Users Search allows you to find specific users by name. You can find users by entering their username, or by doing a wildcard (*) search on part of their username. For instance, if you know the user's first name is Jane, and would like to see a list of users with the first name of Jane, you would

1. Go to Company - Roles & Users
2. In the Search field, type: Jane*
3. Click the Search button , or hit the Enter key.

If there is only one Jane, the tree will display her information immediately. If there is more than one Jane in the user tree, a list of all the people with the first name of Jane will appear for you to select from.

You can use the asterisk for a wildcard search at any point in a person's name. The following combinations are all viable searches:

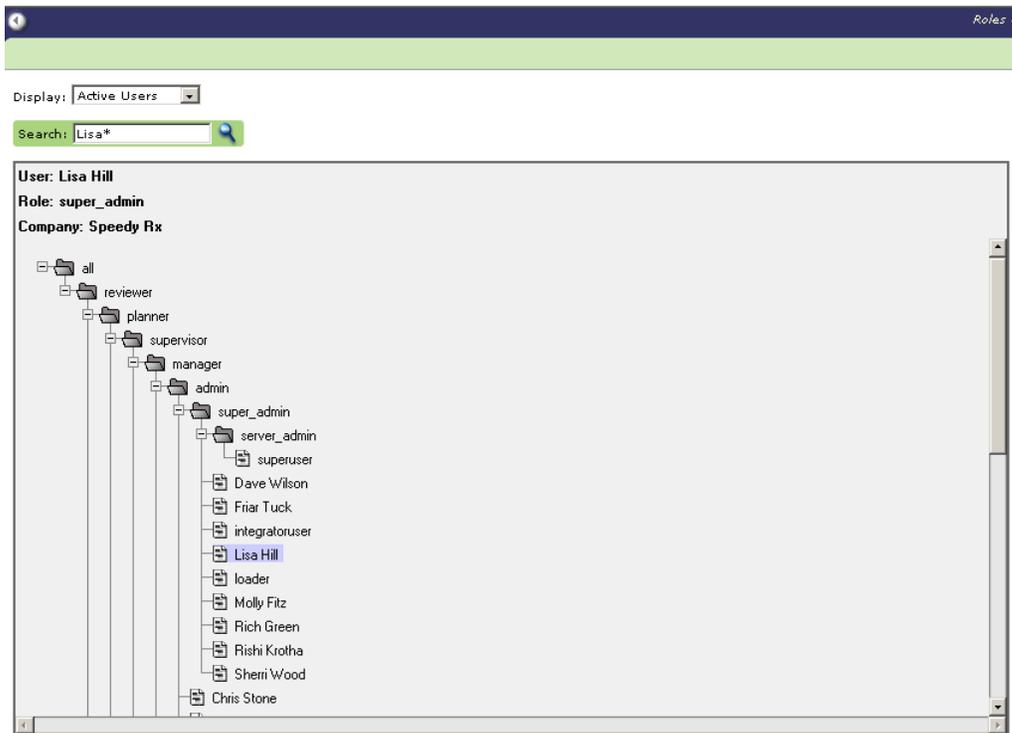
Jane Smith

Jane*

*Smith

Smi

Figure 14–15 Search Users and Roles



Multiple search results are returned on a user search, and a list is then presented with all the users listed who fit the search criteria.

4. Search results will be displayed in a list format, if there are multiple results found. Select the name from the list by clicking on it, and you will be shown a new tree view with the user's name highlighted in the tree hierarchy. Their Name, Role, and Company displayed above the tree. If there are no multiple results found, and only one user who fits the search criteria, there will be no list; you will instead go directly to the tree view with the user name highlighted.

If there is only one search result match, the user tree will appear with the user's name highlighted.

Creating Users

Access To This Feature: Superuser, ServerAdmin

Once you create a new user, you must set the access control for the user. For details on setting the access control for a new user, see [Setting and Editing User Access Control](#).

To create a new user in a specific role

1. Click **Roles & Users** from the VCC menu.
2. Highlight "reviewer," "planner," "supervisor," "manager," "admin," "super_admin," or "server_admin" depending on the role to which you want to assign the user.
3. Right click on the Role folder to access the **Create User** pop-up

Figure 14–16 "Create User" option

4. Left click the **Create User** pop-up. The **Create User** screen appears.

Figure 14–17 Create User Screen

Create User

Role: manager

* User Name:

Real Name:

E-Mail Address:

Telephone Number:

Fax Number:

* Password:

* Confirm Password:

* Company:

Language: American English

5. In the **User Name** field, enter a user name.
6. In the **Real Name** field, enter the user's real name. Enter the user's E-Mail Address, Telephone Number, and Fax Number, if desired. This contact information will appear whenever the username link is clicked and the user is examined. See example below.

Figure 14–18 Examine User

Examine User

User Name: Dave Wilson

Real Name:

E-Mail Address:

Telephone Number:

Fax Number:

Company Name: Nabisco

7. In the **Password** field, enter the password and enter the password again to confirm in the **Confirm Password** field.
8. Select the company to which the user belongs from the **Company** drop-down menu.
9. In the Language field, select the language to which you want to assign the user.
10. Click **Create**. The **Edit Roles & Users** screen appears.

Note: You cannot use the same browser that was used to create a new user to log in as the new user. A new browser (new session) must be opened in order to log in. Wait 50-60 seconds before the new user logs in.

Once a user is created, you will see a reminder to Set Access Control for the users Hierarchy, Stream and Module access. If you do not assign access control, the user is not able to view any data.

Setting and Editing User Access Control

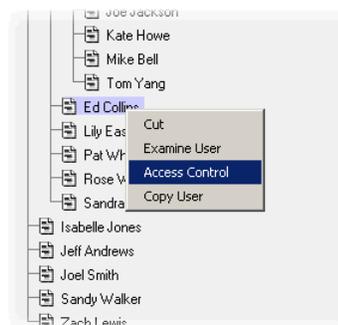
Access To This Feature: Superuser, ServerAdmin

Accessing the User Access Control Screens

All user Access Control are managed through a right-click menu in the Roles & Users screen. To access this screen

1. Select **Roles & Users** from the VCC menu.
2. Highlight the user whom you want to add or change Access Control for and right-click. Select "Access Control" from the menu.

Figure 14–19 Assign User Access Control



3. The Hierarchy Access screen appears by default. This is a tabbed view which allows access to
 - Hierarchy access control
 - Stream access control
 - Module access control

Select the appropriate tab(s) to modify access control for that user.

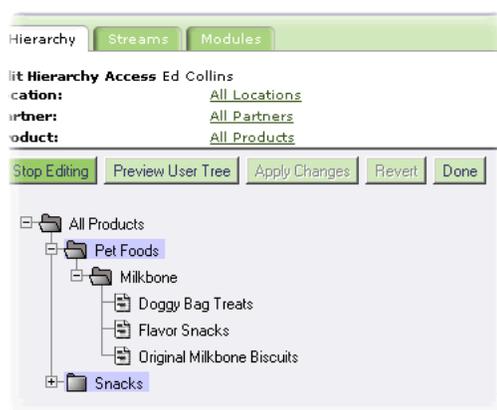
Hierarchy Access

Oracle Retail VCC allows you to grant a user access to any category or leaf-level item in a location hierarchy, partner hierarchy, and/or product hierarchy. You cannot, however, grant a user access to the company root folder for any hierarchy. If you want to do this, when creating the company, you must create a "dummy" root folder and then create the real root folder ("All Products," for example) below it so you can grant users access to the real root folder.

To edit or create hierarchy access control

1. Select the **Edit Hierarchy Access** tab. The Edit Hierarchy Access screen appears.

Figure 14–20 Edit Hierarchy Access Screen



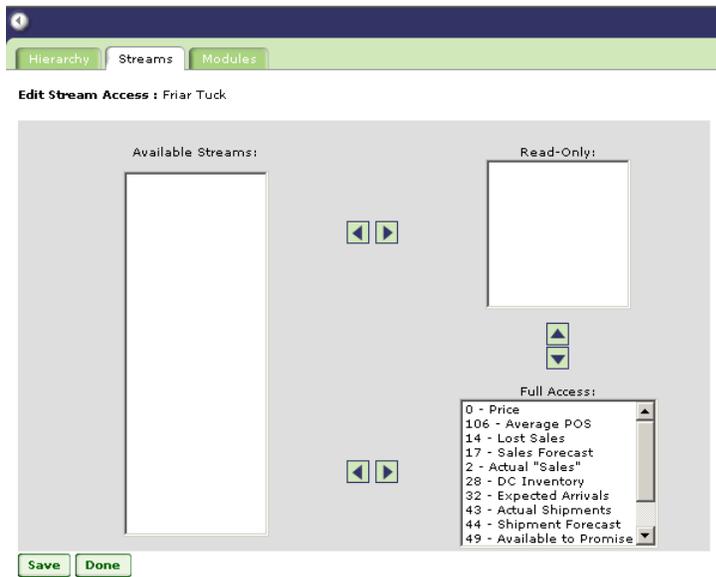
2. Click the **Start Editing** button to begin editing. The **Stop Editing** button appears.
3. Click "All Locations," "All Partners," or "All Products" to assign access to the desired category or folders. Any access rights that the user currently has are highlighted (in purple).
4. Click a location, partner, or product to highlight it and grant access, or click a highlighted location, partner, or product to unassign access.
5. Click **Apply Changes** to commit the changes you have selected. Click **Revert** to return to the user's current access control. Click **Preview User Tree** to verify the new tree.
6. Click **Stop Editing**.
7. Click **Done**.

Stream Access

You can assign a user access to any data stream or streams that have been assigned to the company to which the user belongs. To assign a user access to a data stream or streams

1. Select the Streams tab. The **Edit Stream Access** screen appears.

Figure 14–21 Edit Stream Access Screen



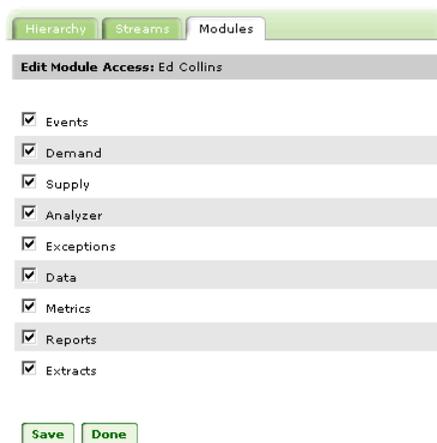
2. Highlight a stream in the **Available Streams** list box and click the left arrow to add it to the **Full Access or Read Only** list box.
3. Click **Save**.

Module Access

Oracle Retail VCC modules can be turned on or off for specific users. To enable or diable a user's access to certain modules

1. Select the Modules tab. The Edit Module Access screen appears.

Figure 14–22 Edit Module Access Screen



2. Enable/disable modules by checking the check boxes.
3. Click **Save** to save changes, **Done** to exit without saving.

Note: To expand or collapse the entire tree, see [Working With Tree Hierarchies](#).

Examining a User

Access To This Feature: Superuser, ServerAdmin

Examining a user allows you to view and update the login status and to change a user's password. To examine a user

1. Select **Roles & Users** from the Administrator main page.
2. Select a user and right-click on the highlighted user.
3. Click **Examine User**. The Examine User screen appears.
4. Click **Done** when you are finished to return to the **Roles & Users** screen.

Disabling a User

Access To This Feature: Superuser, ServerAdmin

To disable a user

1. Select **Roles & Users** from the VCC Administrator main page.
2. Highlight the user you want to disable and right-click on the user. Click "Examine". The user's **Examine User** screen appears.
3. Click the check box next to **Login Allowed** to deselect it.
4. Click **Update User**.
5. Click **Done**.

The user remains in the tree but is not able to log in.

Moving a User to a New Role

Access To This Feature: Superuser, ServerAdmin

To move a user to a new role, you must cut the user and paste the user under the new role.

Note that a user cannot move herself or another user at her own level to a new role.

Changing a User Password

Access To This Feature: Superuser, ServerAdmin

As superuser or server admin, you can change any user password. Any administrative role can change passwords for subordinate roles. All users are allowed to change their own passwords.

To change the password for a user

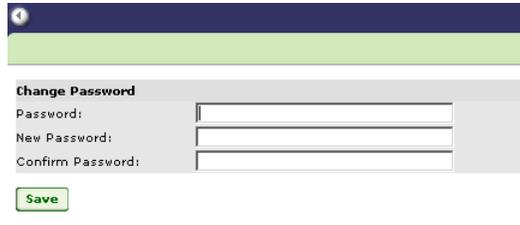
1. Select **Roles & Users** from the VCC menu.
2. Select a user and right-click on the highlighted user.
3. Click "Examine". The **Examine User** screen appears.
4. In the **New Password** field, enter the new password.
5. Reenter the password in the **Confirm Password** field.

6. Click **Update User**.
7. Click **Done**.

To change your own password

1. Select **Preferences - Password** from the VCC menu. The Change Password screen appears.
2. Enter your password in the **Password** field.

Figure 14–23 Change Password Screen



3. Enter your new password in the **New Password** field. Confirm it by reentering it in the **Confirm Password** field.
4. Click **Save**.

Copying a User

Copying a user allows you to create a new user with all the hierarchy access rights and data stream access rights of the user being copied.

To create a new user by copying an existing user

1. Select **Roles & Users** from the VCC menu.
2. Select a user and right-click on the highlighted user. Click on **Copy User**.

Figure 14–24 Copy an Existing User



3. Click on "Copy User." The **Copy User** screen appears.

Figure 14–25 Copy User Screen

The screenshot shows a web form titled "Copy User". The form contains the following fields and values:

- Role:** super_admin
- * User Name:** (empty text input field)
- * Password:** (empty password input field)
- * Confirm Password:** (empty password input field)
- Copy From:** Friar Tuck

At the bottom of the form, there are two buttons: "Create" and "Cancel".

4. In the **User Name** field, enter the new user name.
5. In the **Password** field, enter the new user password.
6. In the **Confirm Password** field, re-enter the user password.
7. Click **Create**.

Designating a System User

To designate a system user, the "System User" check box on the Roles & Users - Examine User screen must be checked.

Note that usage reports will not include users designated as System Users. Users can also be loaded and extracted with System User status. For more information, refer to the Implementor Guide.

Managing Data Purging with the Purge Data Screen

You can purge five types of data:

- Transaction Data – the data substreams loaded into the Oracle Retail VCC database.
- Entries in Monitor – includes Jobs and User Activity purges.
- Event Promotions – event promotions.
- Exception Purge – purges based on status, creation date, period, and inbox type.
- Collaboration Item Comments – context-based collaboration item comments.
- Master Data – any product folders and names, trading partner locations, local company locations, forecast time periods (Time periods cannot be purged. They are hidden from end users when placed in the recycle bin), and period overlays that have been deleted by company administrators and placed in the Oracle Retail VCC recycle bin. Purging master data effectively empties the recycle bin of any master data. Prior to purging master data, you can, if necessary, recover the contents of the Oracle Retail VCC recycle bin.

When company administrators want data stream data purged, they must submit a purge request by selecting **Company - Purge Requests** from the VCC menu. Once a company administrator submits a purge request, it appears in the superuser's and server admin's Purge Data screens. As superuser/server admin, you then can execute the purge requests submitted. To execute a purge request, see [Purging Transaction Data](#).

A purge request specifies the data stream type the company administrator wants to delete (purge) from the database and the time frame (purge date) of the data to be deleted. When you execute the purge request, all data created in the data stream between the dates specified is deleted. Purge requests are not required for Jobs Monitor log purging.

After executing a purge, a log file called **purgedata.log** is created in the [SYNCRA_HOME]\server directory. It contains information about the purge and whether it was successful or not.

Note: If you are unable to restart your server after a Transaction Purge Request fails, it may be a result of purge lock settings. These can be reset by clicking the following executable:
[SYNCRA_HOME]\db\Oracle\script\ReleasePurgeLock.exe

Purging Transaction Data

Access To This Feature: Superuser, ServerAdmin

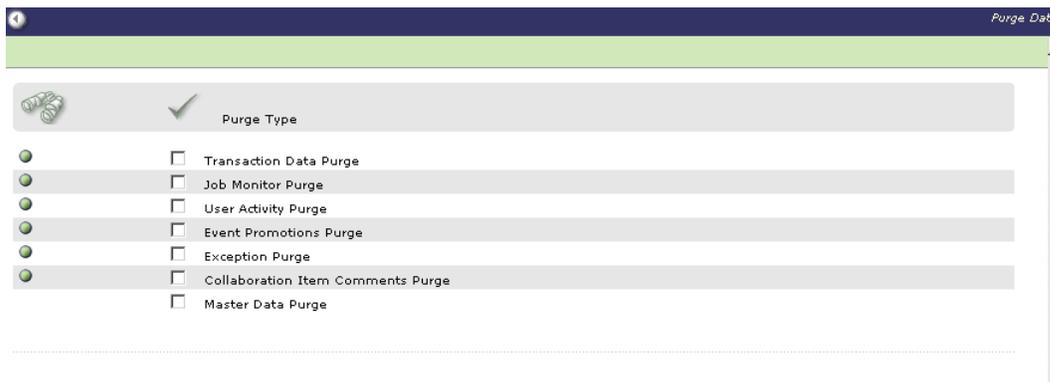
Transaction data is the data contained in a company's data streams. The transactions that appear on the purge transaction data screen are those transactions that were specified in the **Purge Requests** pane.

Prior to purging data, jobs must first be created in Company - Purge Requests. See [Creating Purge Requests](#).

To initiate the purge procedure for purge requests

1. Click **Purge Data** in the VCC menu. The **Purge Type** screen appears.

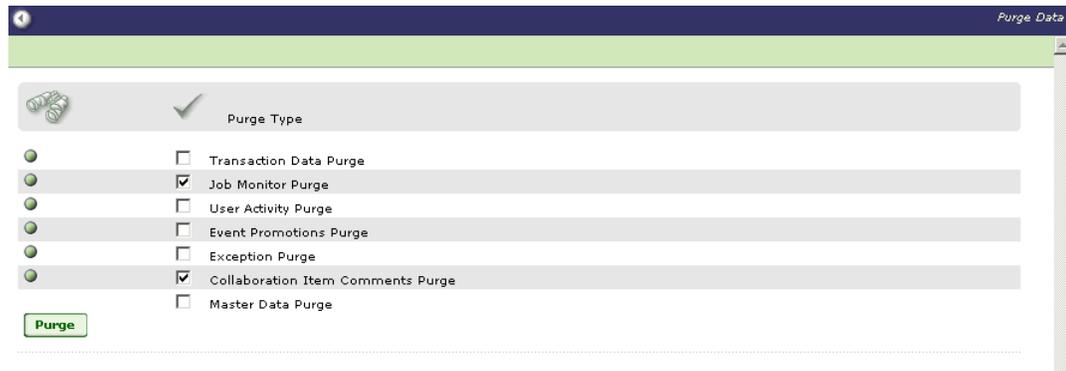
Figure 14–26 Purge Type Screen



2. Click the **Transaction Data Purge** check box. To view all the Transaction purge requests, click the colored dot to view the requests. If you want to delete a purge request without purging any transactions data, click the check box next to the request you want to delete and click the **Delete** button.

Note: You can perform multiple purges simultaneously by checking any or all of the purge types in the **Purge Type** screen.

Figure 14–27 Purge Data Screen



3. Click the **Purge** button on the **Purge Type** screen to purge the transaction data for that request.

Note: You may see an error if the server shuts down during the process of a Transaction Purge or a Master Data Purge: "Error Unmarshalling exception." This error can be ignored, and will not affect the purge in any way.

Purging the Job Monitor

Access To This Feature: Superuser, ServerAdmin

The Job Monitor purge allows you to purge the Job Monitor of all of the jobs or some of the jobs that ran in the VCC Server.

To purge the Job Monitor

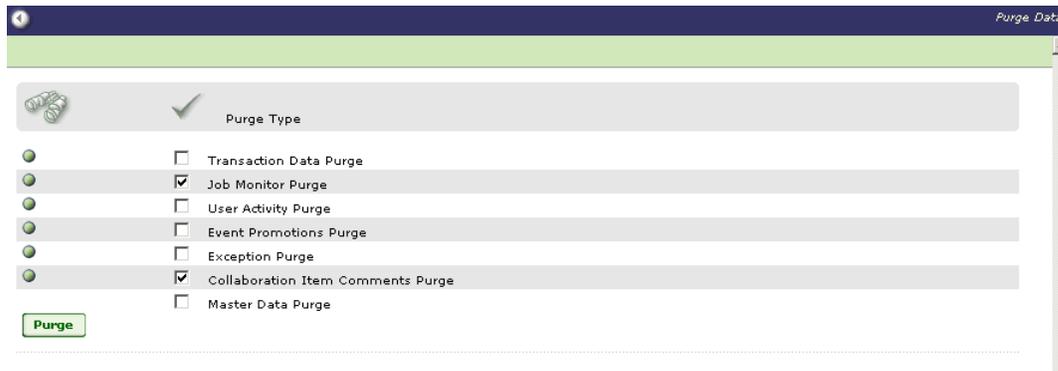
1. Click **Purge Data** in the VCC menu. The **Purge Type** screen appears.
2. Click the colored dot adjacent to the **Job Monitor Purge** check box.
3. In the **Retain n Jobs in Monitor** field, enter the number of most recent jobs to retain after purging. The default is 50000. Click **Save**.

Figure 14–28 Retain n Jobs in Monitor Field



4. Check the **Job Monitor Purge** check box.
5. Click the **Purge** button on the **Purge Type** screen to purge the Job Monitor.

Figure 14–29 Purge Data Screen



Note: Note that you can perform multiple purges simultaneously by checking any or all of the purge types in the **Purge Type** screen.

Purging Master Data

Access To This Feature: Superuser, ServerAdmin

Oracle Retail VCC allows you to empty folders that you have moved to your recycle bin. Company administrators also can place aggregate folders into a recycle bin to be purged. When you (superuser/server admin) purge the recycle bin, all folders and subfolders are purged.

Note: Time periods cannot be purged. They are hidden from end users when placed in the recycle bin.

Placing Periods and Period Folders in the recycle bin removes those periods from the user's view only. It does not remove the Periods for the company. This is because Periods are shared across all companies.

If an item is placed in the recycle bin that has links to folders or leaves in the main parent tree, those relationships will be broken during the purge process. Purging items from the recycle bin will not affect related, linked, or copied items in the parent tree, but will only remove those items placed directly in the recycle bin.

To purge the recycle bin of master data

1. Log in as superuser/serveradmin.
2. Click **Purge Data** from the VCC menu. The **Purge Data** screen appears.
3. Click the **Master Data Purge** check box.

Note that you can perform multiple purges simultaneously by checking any or all of the purge types in the **Purge Type** screen.

4. Click the **Purge** button to purge all data in the VCC recycle bin.

Purging Event Promotions

Event Promotions data includes the information stored in promotion periods, where the product is offered at a changed or reduced price. The items that appear on the

purge event promotions data screen are those transactions that were specified in the **Purge Requests** pane.

Prior to purging data, jobs must first be created in Company - Purge Requests. See [Creating Purge Requests](#).

To initiate the purge procedure for purging event promotions

1. Click **Purge Data** from the VCC menu. The **Purge Data** screen appears.
2. Click the **Event Promotions Purge** check box.

Note that you can perform multiple purges simultaneously by checking any or all of the purge types in the **Purge Type** screen.

3. Click the **Purge** button to purge promotional events.

Purging Collaboration Item Comments

Collaboration Item Comments refers to the data contained in context-level collaboration item comments. The comments that appear on the purge comments data screen are those comments that were specified in the Purge Requests pane.

Prior to purging data, jobs must first be created in Company - Purge Requests. See [Creating Purge Requests](#).

To initiate the purge procedure for purging collaboration item comments

1. Click **Purge Data** from the VCC menu. The **Purge Data** screen appears.
2. Click the **Collaboration Item Comments Purge** check box.

Note that you can perform multiple purges simultaneously by checking any or all of the purge types in the **Purge Type** screen.

3. Click the **Purge** button to purge comments.

Checking the Purge Progress

The Database Administrator can verify the progress of both Master Data and Transaction purges by querying **purge_step** table. The **purge_step** will have the last step number that was successfully completed.

Purge stops if it cannot successfully execute a command. Errors are logged to **purge_data.log** file in [SYNCRA_HOME]\server\ and are also be logged in appropriate **purge_log** table. After correcting the problem, you can restart purge by executing appropriate the **restart** command from sqlplus.

When the restart is performed, purge starts from last unsuccessful command executed.

On successful completion, **purge_step** table will have 0 in the **last_step_executed** column.

After a successful purge completion, run the following analyze schema command as sys

```
Exec dbms_utility.analyze_schema('<SCHEMAOWNER>', 'ESTIMATE', NULL, 35);
```

Table 14–1 Purge

Purge Type	Purge Log Table	Restart Command
Transaction	Purge_log	Exec transaction_purge
Master data	Purge_log	Exec recycle_purge

The tables affected by a transaction purge are

- **AGGREGATES**
- **CURRENT_STREAM**
- **EXCEPTIONS**
- **STREAM**
- **STREAM_ITEM**
- **COMMENTS**

The tables affected by a Master data Purge are

- **AGGCRIT**
- **AGGREGATES**
- **COLLABORATION**
- **COLLABORATION_ITEM**
- **COMMENTS**
- **CONTEXT_COMMENTS**
- **CURRENT_STREAM**
- **DATA_EXTRACT_REQUEST_LIST**
- **DEMAND_JOB_REQ**
- **DEMAND_POLICY**
- **DISAGG_EFFECTIVE_PERIODS**
- **DISAGG_FACTORS**
- **DISAGG_PROFILE**
- **EVENT**
- **EVENT_COMMENTS**
- **EVENT_COMPONENTS**
- **EVENT_ITEM**
- **EVENT_STATUS_HISTORY**
- **EXCPT_CRITERIA**
- **EXCPT_EXCEPTION**
- **EXCEPTION_STATUS_HISTORY**
- **EXCPT_GRP_CRITERIA**
- **EXCPT_GRP_CRIT_DETAIL**
- **EXCPT_GRP_EXCEPTION**
- **GROUP_EXCEPTION_STATUS_HISTORY**
- **LOCATION_SET**
- **LOCATION_SET_NAMES**
- **METRIC**
- **METRIC_PARM**

- PARTNER
- PARTNER_SET
- PARTNER_SET_NAMES
- PRODUCT
- PRODUCT_SET
- PRODUCT_SET_NAMES
- PROFILE
- REP_OUTPUT
- REP_REPORT
- REP_REPORT_PARAMS
- RP_JOB_REQ
- RP_POLICY
- RO_SS_JOB_REQ
- STREAM
- STREAM_ITEM

Managing Time Periods for All Companies

As superuser/server admin, you must create the time periods that will be used by all companies on the server.

You can create time periods in weekly or daily increments for as many periods as required. Once you create the time periods, company-specific administrators can organize them into a hierarchy, for example, of years, months and weeks using the New Category tool.

A period hierarchy contains period master data, which includes

- period name
- begin date
- end date

Company-specific administrators can create **period overlays**. A period overlay allows you to group the time periods you select into a single category allowing you to view the accumulated forecast figures for all the time periods within the category. For example, you can create a period overlay that contains all the months in 2002 and call it "Monthly 2002." When you apply the overlay to a forecast, the forecast contains time periods in monthly increments that contain the accumulated weekly or daily forecasts for each month.

Only superusers, serveradmins, and superadmins can modify periods.

Guidelines for Creating Time Periods

To be effective, the time periods or time buckets must match the business's regular cycle of sales or supply activities. A retailer who runs promotions on a weekly schedule probably forecasts the promotion as a unit aligned by the promotional week. A supplier who makes daily store deliveries forecasts stores in daily time buckets. Account-level forecasts, on the other hand, may be for fiscal months (4 individual

weeks that can be grouped into a monthly period overlay) reflecting the focus of the sales organization on corporate financial targets.

It is recommended that one or both parties in a collaboration change their time buckets to match one another. An alternate method would be to aggregate finer-grained information from one party to a level where it can be compared with the other partner's base data.

Creating Periods: Company - Configuration - Periods Tab

Access To This Feature: Superuser, ServerAdmin

To create the time periods for a data stream manually

1. Select **Configuration** from the VCC menu. The company configuration screen appears.
2. Click the **Periods** tab. Click **Start Editing**. The **Add Periods** screen appears.

Figure 14–30 Add Periods Screen

The screenshot shows a web application window titled 'Configuration'. The 'Periods' tab is selected. Below the tab is a section titled 'Add Periods'. It contains three input fields: 'Start Date' with a date format [YYYY-MM-DD] and values 2004, 12, and 27; 'Number of Periods' with an empty text box; and 'Number of Days/Period' with a drop-down menu showing 'One'. A green 'Create' button is located at the bottom left of the form.

3. In the **Start Date** field, enter the start date for the periods in the format **yyyy-mm-dd** and enter the number of periods you want to create. Note that if periods already exist in the database, the screen opens with the date of the next period to be created displayed. If periods have not been created, the screen displays the date format.
4. In the **Number of Periods** field, enter the number of periods you want to create beginning from the start date you specified.
5. In the **Number of Days/Period** (number of days in a period) drop-down list, the superuser or serveradmin with an established time bucket (e.g., 7 days/period) can add additional buckets of the same size only. Click **Create**. The periods appear under "All Periods."

You set the bucket size for a new database when you add periods for the first time. After that, bucket size cannot be changed. Subsequent period additions will only be allowed for this selected bucket size.

You cannot create periods prior to the first existing date (for example, you cannot create a period for January when the first period is February).

6. Click **Create**.

Creating Time Period Folders

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

Use folders to organize data stream time periods. Time periods in your database can be in either weekly increments or daily increments. No matter which type you use,

you can organize the time increments into weeks, months, and years to create a period category you can expand and collapse.

Note: If your periods include more than one year, the labels for subfolders created under any year should include that year's number. If year labels are not added to subfolders, confusion can result when the same month and different years are selected anytime you use periods; for example, when you create exception criteria or trading partner metrics.

To create a period category

1. Select **Company -Master Data** from the VCC menu.
2. Click the **Periods** tab and highlight any period category where you want to insert a category.
3. Click **Start Editing**. The **Stop Editing** button appears.
4. Right-click the period category and select "New Category" from the pop-up menu. Note that leaf-level periods only display the options "Create Link" and "Cut."
5. **New Category** screen appears.

Figure 14–31 New Category Screen

6. In the **Name** field, enter the new category name; in the **Local ID** field, enter the company local ID if applicable.
7. Click **Create**.

Configuring a Language for Oracle Retail VCC with the Configuration - Language Tab

Access To This Feature: Superuser, ServerAdmin

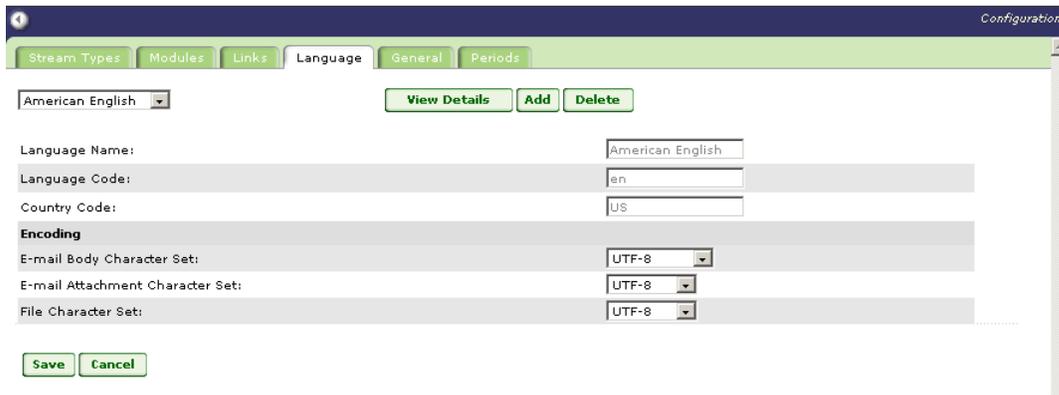
Once the message bundles have been translated in **bundleproperties.jar** and reinstalled, you can add the language by selecting **Configuration** from the VCC menu and clicking the **Language** tab.

In most instances, to change languages you should use a language already available. If you do need to add a language manually, contact Oracle for more information.

To add the language

1. Log in as superuser or serveradmin. Only superuser or serveradmin can add a new language so other users can select it.
2. Select **Configuration** from the VCC menu and then click the **Language** tab. The language screen appears.

Figure 14–32 Language Screen



3. Click **Add**. In the **Language Name** field, enter the name of the new language; in the **Language Code** field (see <http://java.sun.com/products/jdk/1.2/docs/guide/internat/locale.doc.html>), enter the code for the new language; in the **Country Code** field, enter the country code abbreviation. See **CountryCode** abbreviations in column 2a at <http://java.sun.com/products/jdk/1.2/docs/guide/internat/locale.doc.html>
The Language Code and Country Code you use must correspond to codes you used when saving the message bundle files and in the language identifier column of the database files.
4. The Language Encoding section allows the selection of different character sets for use in E-mail, files, and attachments sent through Oracle Retail VCC. For Asian languages, select the appropriate "iso-2022" combination (Japanese = jp, Korean = kr).

Note: If you would like to use the Export Data icon for Korean, you must select "MS949" for both the E-mail Attachment Character Set and File Character Set drop-downs.

5. Click **Save**. The language is added and individual users may select this language from their Preferences -Localization screen.

You can view language pack details by selecting **View Details**. Viewing language details allows you to view the language name, language code, and country code.

Configuration - General Tab

Access To This Feature: Superuser, ServerAdmin

Renaming Labels

In the Labels section of the General tab, you will see a list of Default Labels on the left and on the right a corresponding text box for each label given. The default in each text box will be automatically filled in, but by changing the text in the Custom Labels column, you can rename them.

Note: The label names, like the stream names, are language specific. If you have selected a language in Preferences, create new names, and later switch to another language, you will not see the names stored for the previous language. They can, however, be accessed by switching back to the original language they were created in.

To rename a label

1. Select Configuration in the left menu.
2. Select the General tab. The General configuration screen appears.

Figure 14–33 General Configuration Screen

3. Under the Labels section, highlight the default text (or double-click) in the text box for any given label, and type your desired label name.
4. Click the Save button at the bottom of the screen.

Setting Export Compression Size

Access To This Feature: Superuser, ServerAdmin

File compression is a way of reducing file size, so that download-time for larger files can be shortened.

Setting the Export Compression for files will allow you to determine the format of a file based on file size. Files under the limit will be sent in un-compressed format, files that are above the limit when uncompressed will then be zipped and sent.

The default compression size will be set to 100 Kb.

To change the Export Compression setting

1. Select Configuration from the menu.
2. Select the General tab.

3. Under the Export Compression section, type a new number in the Compress file if greater than text box. Select an increment size from the drop-down list.
Screens that will be affected by the export compression you set will appear to users with the Export Data icon in the upper right part of the screen. Users can open or decompress the zipped files with unzip programs such as WinZip® or PKZIP®.
4. Change the size limit of Events documents by selecting the Reject file if greater than text box and entering a new number. Select the size increment from the drop-down.
5. Click the Save button.

Setting the Usage Statistics E-mail Notification in the Billing Tab

Oracle Retail VCC allows you to send an e-mail message to a user or group of users each time Oracle Retail VCC recalculates usage statistics. To send an e-mail in a foreign language, first ensure the language is loaded for Oracle Retail VCC.

To send an e-mail notification

1. Click **Configuration** in the VCC menu.
2. Click the General tab. The General screen appears.
3. Under the Billing section, in the **E-Mail** list box, enter the e-mail address or addresses (separated by a semicolon) to the users to be notified.
4. Select the Language you wish e-mail to be generated in.
5. Check the check box labeled **Send e-mail every time the Usage Report is run** to send e-mail every time usage statistics are calculated. For a usage report to be calculated, you must schedule the Report Usage task to run at specific intervals. Note that usage reports will not include System Users in the active user count. This setting is configured by the superuser or serveradmin in Roles & Users - Examine User screen by checking the "System User" check box. Users can also be loaded and extracted with System User status. For more information, refer to the Implementor Guide.
6. Click **Save**.

Purging Transaction Data, the Job Monitor Log File, Current Connections, Event Promotions, Exceptions, Collaboration Item Comments and Master Data.

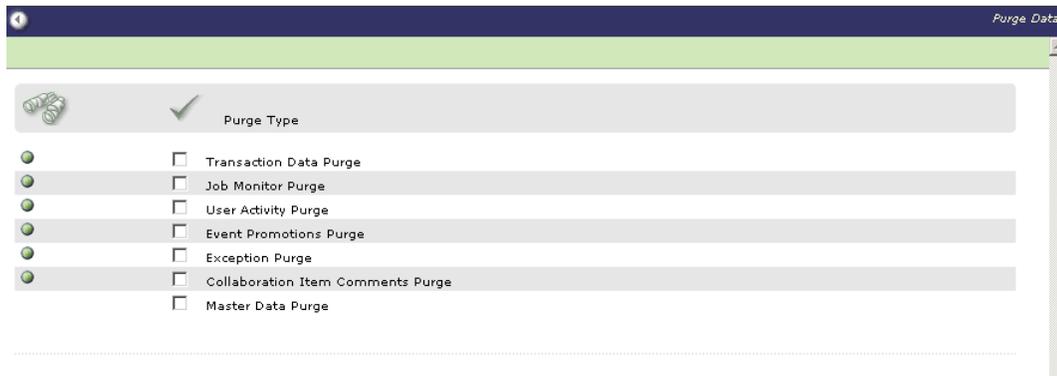
Access To This Feature: Superuser, ServerAdmin

Note: New in 6.1, the User Activity Purge allows you to purge the Current Connections log table.

To view purge requests submitted by administrators and purge data

1. Select Purge Data from the VCC menu. The **Purge Data** screen appears.

Figure 14–34 Purge Data Screen



2. To execute a purge, check the check box next to purge type and click Purge.
3. To view Transaction Data purge requests, click the colored dot next to Transaction Data Purge. A screen displaying all purge requests appears.

Figure 14–35 Purge Data Screen

The screenshot shows the 'Purge Data' screen displaying a table of purge requests. The table has the following columns: Company Name, User, Creation Date, Status, Purge Begin Date, Purge End Date, Purge Begin Offset, Purge End Offset, Is Period Purge, Stream Type, and Purge Type. There are four rows of data, all for 'Nabisco' and 'superuser'.

<input checked="" type="checkbox"/>	Company Name	User	Creation Date	Status	Purge Begin Date	Purge End Date	Purge Begin Offset	Purge End Offset	Is Period Purge	Stream Type	Purge Type
<input type="checkbox"/>	Nabisco	superuser	10/14/02 09:40:09	Submitted	02/04/02	N/A	N/A	12	N	Actual "Sales"	Leaf
<input type="checkbox"/>	Nabisco	superuser	10/14/02 09:40:29	Submitted	02/04/02	N/A	N/A	111	Y	Actual "Sales"	Aggregate
<input type="checkbox"/>	Nabisco	superuser	10/14/02 09:40:00	Submitted	02/04/02	10/14/02	N/A	N/A	N	Sales Forecast	Leaf
<input type="checkbox"/>	Nabisco	superuser	10/14/02 09:40:20	Submitted	02/04/02	10/01/02	N/A	N/A	Y	Sales Forecast	Aggregate

4. To reject a purge request, check the check box next to the request you want to reject, and click **Reject**.

Purging Transaction Data, the Job Monitor Log File, Current Connections, Event Promotions, Exceptions, Collaboration Item

Managing Company General Information and Preferences

This chapter includes the following topics:

- [About Your Company General Information](#)
- [Managing Company General Preferences](#)
- [Managing Groups for a Company](#)
- [Managing Links for a Company.](#)
- [The Period Overlays Tab](#)
- [Using the Real Time Extract Tab](#)
- [Using the Stream Types Tab](#)
- [Configuring E-mail Alerts](#)

About Your Company General Information

Once a superuser or serveradmin creates your company in Oracle Retail VCC, you can begin creating the framework for it. When your company information changes, you must make the changes using the administrator tasks.

The company information you must define for your company includes

1. General company-specific configuration information including Groups, Links, Period Overlays, Real Time Extract, Stream Types and E-mail.
2. **Master data**, which includes products; your trading partners; your company locations; data stream time periods; and period overlays, if applicable. You can create master data manually using the administrator tasks, or you can load master data from a file (see the **VCC Operations Guide**).
3. Collaborations, which are the products you and your trading partner collaborate on.
4. Users and roles.
5. Base Price Profiles for products.
6. Disaggregation, if applicable. For details about disaggregations, see [About Data Stream Disaggregation](#).
7. Aggregates, if applicable. For details about aggregates, see [About Aggregates](#).
8. Data purge. For details about data purging, see [About Data Purge Requests](#).

Managing Company General Preferences

A company's general preferences can be configured by a superuser, serveradmin, or by a company administrator (superadmin or admin). Company general preferences configuration allows you to configure your company to

- Change the company name and/or ID.
- Freeze future periods.
- Set Balance Stream view preferences.
- Set the number of results displayed per page.
- Set the number of decimal places.
- Allow or disallow proportional disaggregation.
- Allow or disallow straight line disaggregation.
- Allow or disallow partner editing of the company calendar.

Company - General Config - General Preferences

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

To configure company general preferences

1. Select **Company - General Config** from the VCC menu. The Company Configuration screen appears.
2. Click the **Preferences** tab.

Figure 15–1 Preferences Tab

The screenshot shows a web interface for configuring company preferences. At the top, there are tabs for 'Preferences', 'Groups', 'Links', 'Period Overlays', 'Real Time Extract', 'Stream Types', and 'E-mail'. The 'Preferences' tab is active. The form contains the following fields and options:

- Name:** Nabisco
- ID:** 10-124-1107
- Alternate ID:** (empty)
- Role:** Seller / Local
- ID Type:** DUNS (dropdown)
- ID Type:** GLN (dropdown)
- Freeze Future Periods:** 0
- Auto Create Collaborations:** Yes (dropdown)
- Display period for Balance Streams:** Last (dropdown)
- Results per page:** 500
- Decimal places displayed:** 2
- Start Day of Week:** Sunday (dropdown)
- Days in 1st Week of Year:** 4 (dropdown)
- Proportional Disaggregation (UI only):**
 - Factor base for Subtype1: None (dropdown)
 - Factor base for Subtype2: None (dropdown)
 - Factor base for Subtype3: None (dropdown)
- Straight Line Disaggregation (Dataload only):**
 - Enable Straight Line: No (dropdown)

A green 'Save' button is located at the bottom left of the form.

The upper section contains the current Name, ID, ID Type, Alternate ID, [Alternate] ID Type, and Role configuration for your company. You can revise the Name and or ID, but the Role configuration is permanently assigned when your company is created.

The lower section contains a set of the following parameters that affect various Oracle Retail VCC features and are applied for every user of your company:

- Allow Partner Company to Edit Calendar: Affects the Shipping/Receiving Calendars in the Supply module. Select "Yes" to allow your partner company to edit your shipping or receiving calendar or "No" to disallow it. Note that either you or your partner may edit the calendar, but not both. If you give your partner permission to edit your calendar, you are not able to make changes, but you can still view.
- Freeze Future Periods: Affects actions in **Data - View/Edit**. In the **Freeze Future Periods** field, enter the number of periods from the current period in which you want to disallow data entry or editing. Enter 0 if you do not want to freeze future periods. When you make a change to this field, it does not take effect until the next logon.
- In the **Auto Create Collaborations** field, select "Yes" if you want collaboration items created by your partner to appear in your collaboration hierarchy. If you select "No," any Collaboration Items created by your partner will not appear in your hierarchy. You must contact the partner manually to determine if new Collaboration Items were created. **This feature applies to trading partners located on the same server machine only.**
- Display period for Balance Streams: Applies when Balance streams are viewed in a period overlay in **Data - View/Edit**. In the **Display period for Balance Streams** field, select "First" to view the value contained in the first period of the period overlay; select "Last" to view the value contained in the last period of the period overlay. Since Balance streams are not accumulated over time, you must select a specific period to display. For details, see [About Accumulation Rules](#).
- Results per page: Applies to aggregate and disaggregate lists. In the **Results per page** field, enter the maximum number of list items that can be displayed per page. The default is 500.
- Decimal places displayed: Affects how numerical values are displayed. In the **Decimal places displayed** field, enter the number of decimal places you want displayed. The default is two decimal places.
- Start Day of Week allows selection of which day to begin the calendar week with. If your business week begins on Wednesday, you have the ability to change the starting weekday that appears in the pop-up calendar.

Figure 15–2 Pop-up Calendar



- Days in 1st Week of Year indicate the number of days that should be counted in the first week of the new year. Setting this option maintains accuracy in the Events calendar, as well as the pop-up calendar used throughout Oracle Retail VCC. Example:

The first week of the new year contains N number of days. N is configurable from 1 - 7. On a Sunday - Saturday week, where January 1st falls on a Thursday, "3" is selected from the Days in 1st Week of Year drop-down. This will sync up the first week of the year with the traditional first day of the year.

Figure 15–3 Pop-up Calendar



If, however, your calendar's Start Day of Week begins on Monday, selecting "7" would result in the calendar seen below. In this calendar, Jan. 1 - 4 are assigned to the prior year, not the new year, as indicated by week number "52" in the lefthand column. The first week of the year doesn't begin until Monday, January 5th.

It is recommended that you ensure the Start Day of Week and Days in 1st Week of Year work in conjunction.

Figure 15–4 Pop-up Calendar



- Allow Proportional Disaggregation (UI only): Select whether the factor for Subtype1, 2, and 3 will be based on "Self," "None," or "Total" from each drop-down.

Self – based on value contained in Subtypes1, 2 and 3
 None – no base factor used
 Total – based on total value of Subtype1, 2 and 3

Proportional disaggregation allows you to enter a value at the aggregate level and allocate it based on the relative proportions of the current leaf values. Proportional Disaggregation has the advantage of not requiring you to maintain disaggregation factors. The calculation is dynamic. This approach also is useful when the ratios among the component values being adjusted are different than the historical demand; for example, during a promotional period. In this case, factors created through an analysis of historical data might not be accurate, and the relative proportions set manually when the promotion was set up should be maintained when changes are made at an aggregate value. Note that if no data exists for a period, the aggregate value is equally allocated across all valid collaboration items under that context. See [Proportional Disaggregation](#) for details.

- Allow Straight Line Disaggregation (DataLoad only): enable Straight Line Disaggregation by selecting "Yes" from the drop-down. Oracle Retail VCC defaults to "No." Straight Line Disaggregation distributes an equal percentage

of a given value among each of the leaves. See [Straight Line Disaggregation](#) for details.

3. Click **Save**.

Managing Groups for a Company

A group is a collection of data stream subtypes to which you assign a group name. For example, you can create a group that includes primary base shipping data streams, primary promotional shipping data streams, and primary total shipping data streams and call it "My Shipments Group." When viewing data streams in Oracle Retail VCC's data stream view, you can select the group, and its components are displayed in either the graph mode or table mode.

For details on how to add, edit, rename, or preview groups, see [Creating and Editing Groups](#).

The "All" group is your initial default group. Unlike other groups you create yourself, the "All" group is preconfigured to include all of the streams assigned to your company. Each time a new stream is assigned to your company, it will be included in the "All" group. Users may be assigned stream access to some or all of the streams in the "All" group. This will be reflected appropriately when users view streams within the "All" group in Data - View/Edit. Administrators can edit the "All" group to suit company requirements.

Managing Links for a Company

A superadmin or an admin can create Web links for his or her own company. A superuser or serveradmin can create links for any company. When you create a link for a company, the link appears under **Links** in the VCC menu. You also, can make links visible or hidden, edit links, and remove links. Links are a convenience and allow you to link to any Web site you might require from the VCC menu.

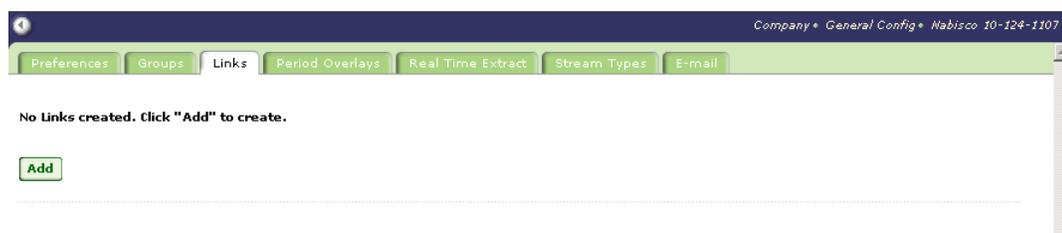
Creating a Company Link with the Company - General Config - Links Tab

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

To create a link for a company

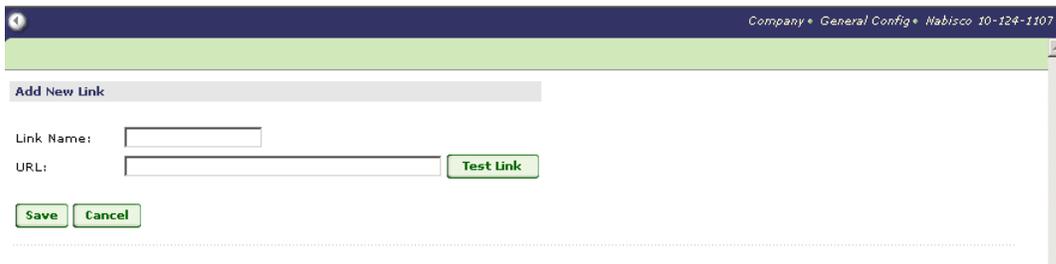
1. Select **Company - General Config** from the VCC menu.
2. From the **Configuration** pane, click the **Links** tab. The **Links** screen appears.

Figure 15–5 Links Screen



3. Select a company from the Company Chooser, if necessary. To add a link, click **Add**. The **Add a New Link** screen appears.

Figure 15–6 Add a New Link Screen



4. In the **Link Name** field, enter a name for the link that will appear under **Links** in the VCC menu.
5. In the **URL** field, enter the URL for the link and click **Test Link** to ensure it works.
6. Click **Save**.

Editing a Company Link

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

To edit an existing link

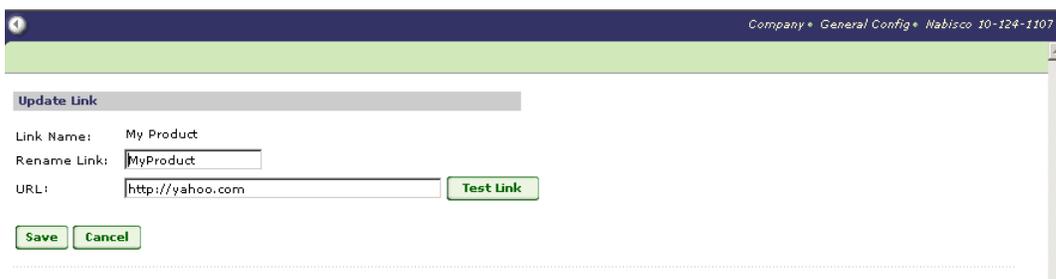
1. Select **Company - General Config** from the VCC menu.
2. From the **Configuration** pane, click the **Links** tab. The **Links** screen appears.

Figure 15–7 Link Screen



3. Select a company from the Company Chooser, if necessary. Highlight the link you want to edit and click **Edit**. The **Update Link** screen appears.

Figure 15–8 Update Link Screen



4. In the **Rename Link** field, enter a new name for the link if required.
5. In the **URL** field, enter the new URL if required.

6. Click **Save**.

Deleting a Company Link

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

To delete an existing link

1. Select **Company - General Config** from the VCC menu.
2. From the **Configuration** pane, click the **Links** tab. The **Links** screen appears.

Figure 15–9 Links Screen



3. Select a company from the Company Chooser, if necessary. Highlight the link you want to delete, and click **Delete**.

Hiding Company Links

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

To hide an existing link or make a hidden link visible

1. Select **Company - General Config** from the VCC menu.
2. From the **Configuration** pane, click the **Links** tab. The **Links** screen appears.

Figure 15–10 Links Screen



3. Select a company from the Company Chooser, if necessary. Highlight the link you want to hide, and click the arrow to move it into the **Hidden** category. To make a hidden link visible, click the arrow to move it into the **Visible** category.

The Period Overlays Tab

Period Overlays can be created and configured both in the Company - General Config - Period Overlays tab, as well as in the client's user Preferences - Layout - Table/Graph

- Period Overlays screen. See [Creating and Editing Period Overlays](#) for more details about using period overlays.

Using the Real Time Extract Tab

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

About Real Time Extracts

Real Time Exports affect both period overlays and stream items. Each stream item in Configuration - Stream Types - View/Edit (superuser/serveradmin only) includes a Real Time Export check box where either a subtype or total stream can be selected. For Period Overlay Extracts, when a change is entered via period overlay, the data extracted applies only to the overlay and does not filter down to base periods.

Real Time Exports always export in UTF-8 encoding. This is not configurable. Files generated from Real Time Export will contain a Creation Date that is in GMT.

You can configure Real Time Extracts in the Company - General Config. - Real Time Extract tab. Extract settings on this screen allow you to specify:

- The file path
- File delimiter
- Precision, by setting the number of decimal places
- Which columns to include
- Column order
- UOM

Note: Comment, Reason, and Revision Status will not be extracted if a Data Stream is saved using either a Period Overlay, or with "Total Stream" selected for Real Time Extract. Additionally, data from Real Time Extract will have a creation date that is in GMT.

Configuring Real Time Extracts

To configure Real Time Extracts

1. Select Company - General Config from the VCC menu.
2. Click the Real Time Extract tab. The Real Time Extract screen appears.

Figure 15–11 Real Time Extract Screen

3. Enter a File Path, if different from the default.
4. Select a File Delimiter. Options are: comma, tab, or other (user specified).
5. If you wish to set data precision, check the Set Precision check box. This will enable the Decimal Places text box where you can enter the number of decimal places that will display.
6. Select a UOM from the drop-down.
7. Hide or show columns by moving items into the "Visible" and "Hidden" select boxes.
8. Click Save.

Be advised that saving Data Streams in the above scenario will result in file extraction of the following:

- Leaf Stream Data
 - - stream subtype leaf period
 - - stream total leaf period
 - - stream subtype period overlay
 - - stream total period overlay
 - - standard UOM will be applied if selected from the General Config - Real Time Extract tab
- Aggregate Stream Data
 - When Product is at aggregate level:
 - * - leaf period stream subtype
 - * leaf period stream total
 - * - period overlay subtype
 - * - period overlay total
 - * - only Base Units' value will be extracted, UOM is not applied.
 - Only Local and/or Partner at aggregate level:

- * - stream subtype leaf period
- * - stream total leaf period
- * - stream subtype period overlay
- * - stream total period overlay
- * - standard UOM will be applied if selected from the General Config - Real Time Extract tab

Using the Stream Types Tab

The Stream Types tab is located under Company - General Config, and allows you to configure some or all of the following options for each stream type:

- Decimal Places
- Apply UOM
- Fill Bucket

To view and configure stream types

1. Select Company - General Config from the VCC menu.
2. Select the Stream Types tab. The Stream Types screen appears.

Figure 15–12 Stream Types Screen

Stream Name	Stream Type	Accumulation Rule	Revision History	Edit by	Edit When	Substreams	Decimal Places	Apply UOM	Fill Buck
Actual "Sales"	2	Movement	No	Buyer	Past	2	2	<input checked="" type="checkbox"/>	
DC Inventory	28	Balance	No	Buyer	Past	1	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DC Receipts	29	Movement	No	Buyer & Seller	Past	1	2	<input checked="" type="checkbox"/>	
DC Shipments	35	Movement	No	Seller	Past	1	2	<input checked="" type="checkbox"/>	
Finished Goods Inv	33	Balance	No	Buyer	Past	1	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Price	0	Measure	No	Buyer & Seller	Future	2	2	<input type="checkbox"/>	
Sales Forecast	17	Movement	Yes	Buyer & Seller	Future	3	2	<input checked="" type="checkbox"/>	
Shipment Forecast	44	Movement	Yes	Buyer & Seller	Future	3	2	<input checked="" type="checkbox"/>	

3. Configure Decimal Places, UOMs, and Fill Buckets for each stream type.
4. Click Save.

Configuring E-mail Alerts

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

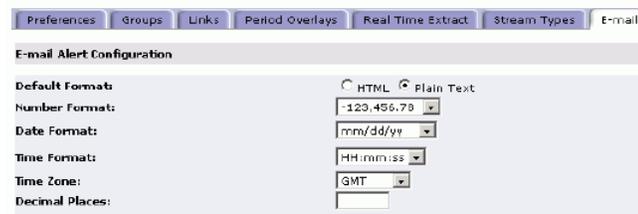
The Company - General Config - E-mail tab allows for the format, and number and localization configurations of e-mail alerts. These settings apply to Exception E-mail Alerts as well as any alerts generated by the Events Module.

To configure E-mail settings

1. Select **Company - General Config** from the VCC menu.

2. Click the **E-mail** tab. The **E-mail Alert Configuration** screen appears.

Figure 15–13 E-mail Alert Configuration Screen



Preferences Groups Links Period Overlays Real Time Extract Stream Types E-mail

E-mail Alert Configuration

Default Format: HTML Plain Text

Number Format: -123.456.78

Date Format: mm/dd/yy

Time Format: HH:mm:ss

Time Zone: GMT

Decimal Places:

3. Default format can be either HTML or Plain Text
4. Localization settings – Number Format, Date Format and Time Format, as well as Time Zone that you wish the e-mail to contain. These drop-downs will appear disabled if you do not have the necessary columns in the "Visible" list.
5. Select the number of Decimal Places you wish the e-mail alerts to contain.
6. Click Save.

This chapter contains the following topics:

- [About Master Data](#)
- [About Entering Master Data](#)
- [Managing Company Locations](#)
- [Managing Company Products](#)
- [Managing Product Hierarchies](#)
- [Guidelines for Creating Product Folders](#)
- [Managing Time Period Hierarchies](#)
- [Managing Company Trading Partners](#)
- [Removing Hierarchy Nodes through the Recycle Bin](#)
- [Managing Master Data Folders](#)
- [About Master Data Hierarchies](#)
- [Working With Tree Hierarchies](#)

About Master Data

A company's master data includes its product hierarchies and leaf nodes, partner hierarchies and leaf nodes, location hierarchies and leaf nodes, and period hierarchies and leaf nodes. It does not include the time-series data associated with leaf nodes, only the hierarchy folder names and leaf names and other leaf-level data such as UOM conversion factors. A superuser can create master data for any company; a superadmin or an admin can create master data for their own company only.

For example, a product hierarchy might contain the topmost folder called "Shampoo." Shampoo could have subfolders called "Normal" and "Extra Body." Each of those subfolders could contain leaf items called "16 ounce" and "24 ounce." All hierarchies are built in this manner: a topmost folder, multiple subfolders, and finally leaf item nodes.

About Entering Master Data

In most instances, you will use the administrator tasks to view and edit your hierarchy folders, but most companies' master data is too voluminous to actually create using the administrator tasks although you can use the administrator tasks to create new

folder. For details on entering master data in bulk mode, see the VCC Operations Guide.

Most often, master data is exported from an existing legacy system using a third-party tool that extracts the data from the legacy system and formats it in the required master data flat-file format for loading. If this is the method you initially used to load your master data, you must always use this method to load any additional master data. Loading additional data using the administrator tasks could cause the primary keys stored in your Oracle Retail VCC database to conflict. Also, if you create a folder using the administrator tasks, you can add children to that folder using the master data hierarchy loader as long as you use the same local ID to reference it.

Managing Company Locations

Oracle Retail VCC allows you to establish a collaboration between your company and a partner. If you and your trading partner have only one location, the collaboration is simple. This is seldom the case. It is more likely that you and your trading partner each have multiple locations, and you want to establish multiple collaborations between multiple locations. To accomplish this, the VCC Client allows you to define location hierarchies for yourself and your trading partners and to create collaborations between any two folders in the location hierarchies. For example, this allows your northeast region to establish a collaboration with your trading partner's Chicago office while your San Francisco office can establish a collaboration with your trading partner's west coast region. Any combination is possible as long as you define the appropriate hierarchies.

The location hierarchies you define with the VCC Administrator appear in the VCC Client locations tree.

Managing Company Products

It is your responsibility to create the products on which you intend to collaborate with your trading partners. This means creating the product folder names and product leaf folder names. The Oracle Retail VCC Client allows you to enter product folders manually or in batch mode through a correctly formatted flat file. For detail on batch mode, refer to the VCC Operations Guide.

Also, for each product you can enter a product price profile that specifies the product price and the time period during which the price is effective. A product can have multiple price profiles for multiple time periods that reflect price changes over the product life cycle. For more information on price profiles, see [Creating Product Price Profiles](#).

The products and product folders you define are displayed in all the views where the product hierarchy is accessed.

Managing Product Hierarchies

A product hierarchy contains product master data, which includes

- **Name** – the name of the product
- **Global Item Number and GIN Type** – the global item number you assign to the product and the type it is (GTIN, UPC, buyer assigned or seller assigned)
- **Local Item Number and LIN Type** – the local item number of the product, and type it is (GTIN, UPC, buy assigned or seller assigned)

- **Unit of measure** – unit of measure used by the product
- **Weight** – product unit weight
- **Volume** – volume of the product
- **Stat Factor (UOM)** – Consolidates many different units of measure (UOM) into a common, single unit of measure. Must be "0" if a common unit-of-measure factor is not provided. This unit-of-measure conversion factor is usually used to reduce a larger number to a smaller one; for example, to reduce cases to individual units (each). If a case has 12 units, the UOM conversion factor would be 12, and the forecast number is multiplied by 12.
- **Units per Load** – allows you to enter a "rough-cut" transportation capacity estimate for this product. This is the number of units expected to be shipped per load for this product. When the Loads UOM is applied to a data stream, each of its values is divided by the maximum load to determine which portion of the load each value represents.
- **URL** – the URL to any link. For example, it can be a URL to a product image or product information.

Guidelines for Creating Product Folders

Products are, for the most part, grouped under product folders for convenience and ease-of-use. Folders help you identify and locate products quickly and easily. For example, if you are a clothing manufacturer, you might construct a product folder containing the folder "Clothing" under which you would create "Shirts," "Pants," "Jackets," etc. Under shirts you might create additional folders for "Casual Shirts," "Dress Shirts," "Polo Shirts." Superusers can create products and product folders for trading partners as long as they are local; superadmin can create products and product folders for her own company as long as it is local. A sample product hierarchy is shown below.

You have the option of creating product folders

- manually by using administrator tasks
- automatically by using the VCC Integrator

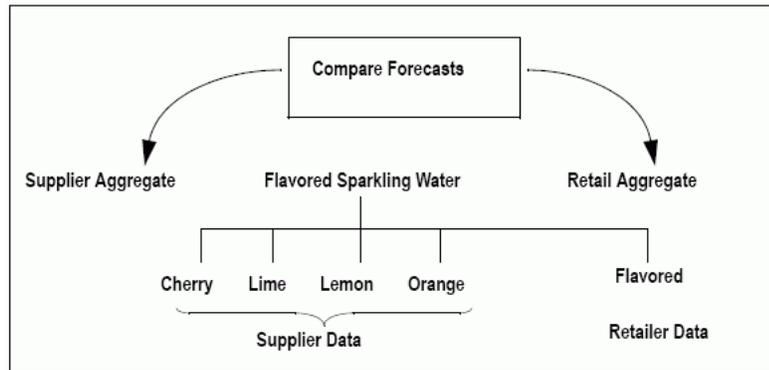
For details on the VCC Master Data Hierarchy loader, see the VCC Operations Guide.

Retailers tend to plan to a greater level of detail by location. It is typical for a retailer to produce store-level forecasts, while it is not the usual practice for suppliers to produce them.

Suppliers plan to a greater level of detail by product. A retailer may plan promotional sales for a product folder, but the supplier needs to know how much of each product in the folder actually needs to be produced. A supplier may have forecasts for multiple generations that it identifies differently, while the retailer continues to assign each generation the same SKU.

To be able to compare forecasts produced at different levels of granularity, create an additional folder in the product or location folder for the higher-level element that is being planned. For example, if a brand offers four varieties of one liter fruit-flavored sparkling water, but the retailer does not forecast each flavor, the supplier can enter forecasts for each flavor, and Oracle Retail VCC aggregates and compares them with the retailer's single-flavored number. The resulting products' folder is shown in the figure below.

Figure 16–1 Resulting Products' Folder



Managing Time Period Hierarchies

The superuser creates (adds) periods that are appended to the root node of a period hierarchy for each company on a hub. Each company's administrator must create and maintain their own company's category (folders), allowing collaborating companies to have different hierarchies. End-users see only their own company's tree.

Managing Company Trading Partners

It is the administrator's responsibility to add the name, DUNS number or company ID, and locations and DUNS plus 4 number, or location ID for each of your trading partners; and also to add the trading partner to your trading partner list. This allows you to configure collaborations between your locations and products, and between those of your trading partners. See [Managing Company Trading Partners](#).

Removing Hierarchy Nodes through the Recycle Bin

Each of the Master Data hierarchies (Products, Locations, Partners, and Periods) includes a Recycle Bin category.

Although nodes cannot be directly deleted from hierarchies, items placed (Cut/Paste) in the Recycle Bin for Products, Locations, Partners, or Periods can no longer be seen in any End User hierarchy view (though associated data remains in the database).

In addition, items placed in the Products, Locations, or Partners Recycle Bins are defined for removal upon the next corresponding Master Data Purge. (After purge, these items are removed from the database.)

Note: The Period Hierarchy Recycle Bin is not affected by Master Data purge. Items placed there will remain.

Managing Master Data Folders

Administrator use folders to manage four different hierarchies:

- Products
- Partners
- Locations

- Periods

These hierarchies can be accessed in the Company - Master Data screen, under their respective tabs.

Administrator options accessed through the hierarchy tree's right-click menu include

- New Category – create new folder.
- Cut – temporarily places the selected folder or item on the clipboard for pasting to a new place in the hierarchy. You can also cut and paste items or folders into the Recycle Bin.
- Copy – allows you to duplicate a folder. When you copy a folder and add leaves to it, the leaves are reflected only in the copied folder and not in the original.
- Paste – used after Cut or Copy to move folders or items to new locations in the hierarchy.
- Create Link – links a folder or folder item in the hierarchy to any other folder or folder item. This allows you to duplicate any folder and its contents, and place it at another location in the hierarchy. The link is similar to a copy, but does not actually copy the information; it creates a link to the original information.

If the folder link you create has leaves, the leaves are also linked. If you create a Link to a folder and add leaves to the link, the added leaves are reflected in both the linked folder and the original folder. When you copy a folder and add leaves to it, the leaves are reflected only in the copied folder not in the original.

- Rename – renames a folder or folder item.

Before attempting to perform any of these operations, ensure that you have loaded your company and have selected the appropriate tab (Products, Partners, Locations, or Periods) from the Company - Master Data screen.

About Master Data Hierarchies

Master Data Search

The Master Data Search toolbar appears under the Master Data Tabs. The Master Data Search allows you to search the Products, Partners, and Locations hierarchy trees by entering attributes to locate a specific folder or leaf node. (No Search options are available on the Period hierarchy.)

The Master Data Search finds the desired folder or leaf by searching on a defined attribute (listed below) entered exactly, or entered as a wildcard search. (To use a wildcard search, enter an asterisk alone, before, or after a known sequence or set of alphanumeric characters.)

If no items are found, "No Records Found" will be displayed, along with instructions for using the wild card search feature.

Table 16–1 Search Attributes For Each Tab/Tree

Tree	Possible Search Attributes
Products	Name, Global ID Number (GIN), Local ID Number (LIN)
Partners	Name, Location ID, Alternate ID, Company Name, Company ID

Table 16–1 (Cont.) Search Attributes For Each Tab/Tree

Tree	Possible Search Attributes
Locations	Name, Location ID, Alternate ID, Company Name, Company ID

*Name search on Folder and Leaf, all others are leaf only.

*If search yields only one result, it will appear highlighted in tree.

*If search yields multiple results, the search list screen opens allowing item selection.

After selection, the item will appear highlighted in the tree.

Tree Behavior

Each of the Master Data hierarchy trees (Products, Locations, Partners, and Periods) have the following standard tree behaviors:

Collapsing and Expanding the Hierarchy Tree

- Ctrl-click the minus sign next to the root node. The whole tree collapses to the root-node level.
- Ctrl-click the plus sign next to the root node. The whole tree expands to the fullest leaf-level degree in all underlying nodes.
- Ctrl-click the minus sign next to a category node. The whole node collapses to the level clicked.
- Ctrl-click the plus sign next to the category node. The whole node expands to the fullest leaf-level degree in the node.

Figure 16–2 Product Tree



Single-Selecting Tree Nodes

- Click on the root, category, or leaf node item to select it. It becomes highlighted. Click again to deselect it.

- After a category item is selected, clicking a leaf item will cause the category item to be deselected.
- After a leaf item is selected, clicking a category item will cause the leaf item to be deselected.
- Within a category, clicking each leaf-level item causes each to be selected in turn.
- Within a higher category, clicking each underlying same-level category causes each to be selected.
- Clicking a category-level after a higher category level is selected will cause the higher category level to be deselected.
- Clicking a category level after a lower category level is selected will cause the lower category level to be deselected.

Multi-Selecting Tree Nodes

- To multi-select leaf-level items, select a leaf-level item within a category and Shift-click on another non-contiguous leaf-level item within the same category. All of the leaf-level items between the two become selected.
- To multi-select same-level category items, select a category-level item that exists within a higher-level category and Shift-click on a non-contiguous category-level item within the same category. All the same-level category items between the two become selected.

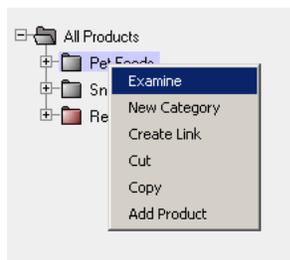
Working With Tree Hierarchies

The Master Data Hierarchies include a right-click menu that provides access to various aspects of tree functionality. Right-clicking on a root, category, or leaf node will display the pop-up menu.

Note: Previous versions of Syncra included an option to "Hide Folder". If a hidden folder is migrated to version 6.0 or later, the hidden folder and its contents are moved to the Recycle Bin of the corresponding hierarchy and will be removed at the next Master Data Purge.

The Start Editing Button and the Right-Click Menu

The tree's right-click menu provides different options depending on whether or not you have clicked the **Start Editing** button, and are in edit-mode, or whether you have decided to **Stop Editing**, and are in examine-mode only. While editing, there are more options than while not editing. If you simply wish to examine a Root, Category, or the Recycle Bin, there is no need to "Start Editing".

Figure 16–3 Right-click Menu

The only level that cannot be examined when not in edit-mode is the leaf nodes on the Period Tree. Also, all local partners' leaf nodes will be read-only while not in edit-mode.

When **Start Editing** has been activated, you are able to examine, create new categories, add products/partners/locations/periods, create links, and cut/copy/paste categories and leaves.

Tree Behavior

Cut and Paste

To utilize Cut and Paste

1. Enable edit-mode by clicking the **Start Editing** button.
2. Select the folders or leaves you wish to Cut and Paste to another folder, then right-click and choose **Cut** from pop-up menu. The selected items are greyed-out to indicate they are ready to be cut from the hierarchy.
3. Click on the folder into which to Paste the cut items and choose Paste from the right-click menu. The items are removed from the original category and placed into new the category.
4. If you decide that you do not want to Paste the selection, disable edit-mode by clicking Stop Editing to restore your selection to its original hierarchy location.

Copy and Paste

You can copy a folder, but cannot directly copy leaf items. If you copy a folder then rename it, it will retain the different names. The underlying leaf items contained in the copied folder behave in the same fashion as a created link. See [Creating Links](#) for more information.

To utilize Copy and Paste

1. Click **Start Editing** to enable edit-mode.
2. Select the folders you wish to Copy and Paste to another folder, then right-click and choose **Copy** from pop-up menu. The selected items become bold to indicate they are ready to be copied.
3. Select the folder into which you will Paste the copied items and choose **Paste** from right-click pop-up menu. The items are copied from the original category and placed into the new category. The copied items will also remain in original category.

Creating Links

This option is similar to Copy and Paste except that this allows the same category and leaves to be represented in more than one position in your hierarchy. If a linked folder or leaf item attribute is revised in one position, the change is reflected in the other position as well.

For example, if you have a category called "Muffins", with leaf items "Bran" and "Banana", you may want the category listed within two upper level categories, "Snacks" and "Baked Goods". If you change the "Banana" name to "Banana Nut" from the "Snacks" category, it will automatically change to "Banana Nut" in the "Baked Goods" category too.

To create a link

1. Select **Start Editing**.
2. Select the folders or leaves for which you wish to create a link.
3. Right-click on the selected leaves and choose Create Link from the pop-up menu. The items become italicized to indicate they are ready to be linked.
4. Click on the folder into which to paste the selected items and choose Paste from Hierarchy menu. The items are copied from original category and placed into the new category. The items also remain in the original category.

To remove linked items and restore the tree to its original hierarchy, Cut and Paste the linked items into their original position.

Creating a New Category

Enable the **Edit**, select the root node or a category node, then choose New Category to add another category (folder) to your hierarchy. The Category node must include a Name and you can also provide a Local ID or one will be auto-supplied by VCC.

Figure 16–4 Create New Category

The image shows a dialog box titled "New Category". It has a dark blue header bar with a left-pointing arrow icon. Below the header is a light green bar. The main content area is white and contains the following elements:

- Title: **New Category**
- Field 1: *** Name:** followed by a text input box.
- Field 2: **Local ID:** followed by a text input box.
- Buttons: **Create** and **Cancel** (both in green buttons).

Examine

Select Examine to View/Edit the current attributes for the node selected. Required fields are marked with an asterisk. If you Examine while the 'Edit' is enabled, see a corresponding "Job" listed in the Jobs Monitor.

Root Node

The Root node is generated during the Create Company process and its label can be revised, but must be included.

Category Node

The Category (folder) node must include a Name and you can also provide a Local ID or one will be auto-supplied by VCC.

Leaf Node - Local Location

The Leaf node displays the current attributes of the item, which are different for Location, Partners, and Products. (There is no Examine at Leaf node in the Periods hierarchy.)

Figure 16–5 Examine Product Screen

The screenshot shows the 'Examine Product' screen with the following data:

Field	Value
Name	Doggy Bag Treats
Global Item Number	0168132113
Local Item Number	NAB0168132113
Unit-of-Measure	EA
Stat Factor	0.50
Units per Load	0.00
Weight	0.00
Volume	0.00
URL	
GIN Status	Update Complete
GIN Type	UPC
LIN Type	SELLER_ASSIGNED

Leaf Node - Partner Location

The Partner leaf attributes are not editable for a 'Local' Partner, but these can be changed for a 'Non-Local' Partner.

Leaf Node - Product

The Product leaf node has special features that, if revised, place an additional listing in the Jobs Monitor.

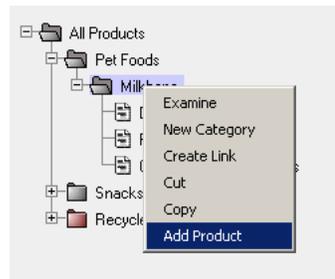
If the Global Item Number is revised, then see the **GIN Status** field in this Examine screen and a new job listing "Replace Product GIN". When the job has completed, the "GIN Status" field will be updated.

If the Stat Factor is updated, then see new job listing "Tag Aggregates/Stat Factor Change".

If the Units Per Load is updated, then see new job listing "Tag Aggregates/ Units Per Load Change".

Adding a Leaf Node

From the right-click pop-up menu, select **Add Product**, **Add Partner**, or **Add Location** to add a new node to the current hierarchy. (There is no Add Leaf node in the Periods hierarchy.) Required fields are marked with an asterisk. A corresponding "Job" is listed in the Jobs Monitor for each edit session used in adding new leaf nodes.

Figure 16–6 Right-click Menu

Adding a Local Location

1. Select **Company - Master Data** from the VCC menu.
2. Select the Location tab
3. Click Start Editing, highlight the category folder under which to place the new Local location.
4. Right-click on the category and select Add Location from the pop-up menu. The Add Location screen appears.

Figure 16–7 Add Location Screen

5. Enter the company Location Name. For example, "My Store at Boston".
6. Enter the company Location ID number and change its type, if desired. Standard options include: GLN (Default), DUNS, DUNS_PLUS_FOUR, SELLER_ASSIGNED, SCAC, BUYER_ASSIGNED, and UN_LOCATION_CODE.

About ID Fields:

- A Location Name, ID or Alternate ID can be any combination of 1 to 40 alphanumeric characters.
 - If you use a DUNS plus 4 number:
 - it must be in the format nn-nnn-nnnn-nnnn
 - the first nine numbers (the DUNS number) must be the same as the DUNS number defined as the parent company ID
 - the last four numbers must be unique
 - you must include the hyphens
7. In the Alternate ID field, enter the company's alternate location ID number and change its type, if desired. Standard options include: GLN (Default), DUNS, DUNS_PLUS_FOUR, SELLER_ASSIGNED, SCAC, BUYER_ASSIGNED, and UN_LOCATION_CODE.

This attribute is a convenience intended primarily for internal company use, though partners will be able to see the Alternate ID if one has been created.

If a unique Alternate ID is not assigned, the system will assume it to be the same as the Location ID.

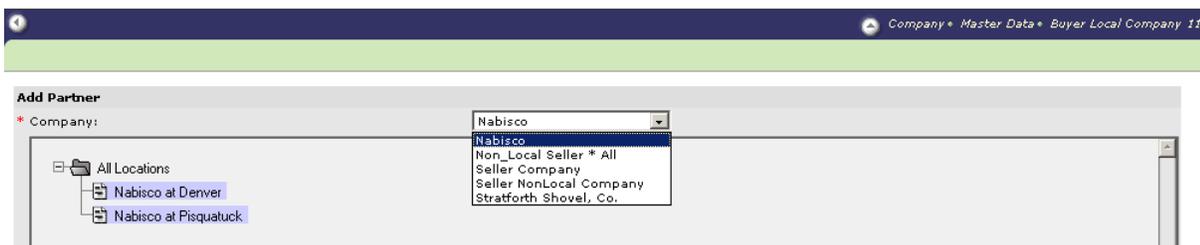
8. Click Create. The new node is added to your highlighted category. Click "Cancel" to return to the tree without adding a new node.
9. Click Stop Editing.

Adding a Partner Location

You can add a Local or Non-Local Trading Partner Location under the "Partner" tab.

1. Select **Company - Master Data** from the VCC menu.
2. Click the **Partners** tab.
3. Click the **Start Editing** button. The **Stop Editing** button appears.
4. Highlight "All Partners" or the appropriate partner folder into which you want to add the new trading partner name and right-click on it.
5. Select **Add Partner** from the pop-up menu. The **Add Partner** screen appears with a list of available partners in the drop-down. The drop-down is organized alphabetically, and the first partner appearing in the list will determine whether the view is Local or Non-Local.
 - Adding a Local partner – when you select a local partner from the drop-down, the following tree appears.

Figure 16–8 Add Partner Tree



Note that if there are no local partners listed, it is because your local partners have not yet added locations to their own Master Data.

- Adding a Non-Local partner – when you select a non-local partner to add, the following fields will be included in the creation process.

Figure 16–9 Add Non-local Partner Tree



- In the **Name** field, enter the company name.
 - In the **Location ID** field, enter the trading partner location ID. The ID can be a DUNS plus 4 numbers in the format nn-**nnn**-**nnnn**-**nnnn**, or any 1-40 alphanumeric characters.
 - Select the Type of location ID from the Type drop-down. Standard options are: GLN, DUNS, DUNS_PLUS_FOUR, SCAC, SELLER_ASSIGNED, BUYER_ASSIGNED, UN_LOCATION_CODE.
 - In the **Company ID** field, enter a company ID. A company ID can be from 1 to 40 alphanumeric characters.
6. Click **Create** to add a partner, or **Cancel** to exit.
 7. Click **Stop Editing** after you have finished adding your partner.

Adding a Product

1. Select **Company - Master Data** from the VCC menu.
2. Select the Product tab
3. Click Start Editing.
4. Highlight the category folder under which the new Product will be created.
5. Right-click on the highlighted category and select Add Product from pop-up menu. The Add Product screen appears.

Figure 16–10 Add Product Screen

The screenshot shows the 'Add Product' screen with the following fields and values:

- Name:** (empty)
- Global Item Number:** (empty)
- Local Item Number:** (empty)
- Unit-of-Measure:** ea
- UOM Stat Labelen_US:** (empty)
- UOM Truckload Labelen_US:** (empty)
- Weight:** (empty)
- Volume:** (empty)
- URL:** (empty)
- GIN Type:** GTIN
- LIN Type:** GTIN

Buttons: Create, Cancel, Test Link

6. Enter the Product Name.
7. Enter the product's GIN (Global Item Number) and select its type from the drop-down.
8. Enter the product's Local Item Number (optional).
9. Enter the product's unit of measure in the UOM field.
10. Enter the product's Stat Factor (optional). A stat factor is a multiplier that you specify as a product attribute that you can use to convert base units to common statistical units. Stat Factors allow you to create a uniform unit of measure across all products by allowing you to multiply the unit of measure for the product by a stat factor that you determine to be appropriate.

There are no hard and fast guidelines for what stat factor to use. This must be determined by your company policy and the factor you determine to be appropriate for your requirements.

Creating a stat factor is particularly useful when aggregating across product lines. Simply aggregating units-of-measure that are different for several products would produce a meaningless aggregate amount.

If you determine an appropriate stat factor for each product and aggregate using the stat factor, the aggregate has meaning for your context.

Do not confuse the stat factor with unit-of-measure conversion which you can specify when loading product information. Unit-of-measure conversion allows you to convert units-of-measure from one unit of measure to another, usually a large number to a smaller number. For example, if you want to create cases to individual units (each) and there are 12 units in a case, the unit-of-measure conversion factor would be 12.

11. Enter the product's maximum Load capacity (optional). The Units per Loads field allows you to enter a "rough-cut" transportation capacity estimate for this product. This is the number of units expected to be shipped per load for this product
12. Enter the product's load Weight (optional).
13. Enter the product's load Volume (optional).
14. Enter a URL to associate with this product (optional).

Note: The URL should appear in the format "http://www.Oracle.com", and not "www.oracle.com". Make sure to begin your links with "http://" and that you test them by clicking on the Test Link button. (Some links may not need "www".)

15. Click Create. The new node is added to your highlighted category. Click "Cancel" to return to the tree without adding a new node.
16. Click Stop Editing.

Managing Company Module Configuration

This chapter includes the following topics:

- [Managing Events Module Configurations](#)
- [Configuring Labels in the Events Module](#)
- [Configuring the User Defined Fields in Promotions and Promotion Items](#)
- [Managing Supply Module Stream Set for a Company](#)
- [Setting and Viewing the Shipping/Receiving Calendar for Supply](#)
- [Managing Demand Module Stream Set for a Company](#)
- [Sample Exception Inbox E-Mail Alerts](#)
- [Configuring E-Mail for the Exception Module](#)

Managing Events Module Configurations

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

Events Stream Set Configuration

With the Company - Module Config - Events - Stream Set Configuration tab you can add, delete, or edit stream sets for the Events module.

To configure Stream Sets:

1. Click **Company - Module Config** in the VCC menu.
2. Pick a company from the **Company Chooser**, if necessary
3. Click the **Events** tab.
4. Select the Stream Set Configuration subtab under Events. The Events - Stream Set Configuration screen appears.

Figure 17-1 Events - Stream Set Configuration screen



- If no Stream Sets are configured, click Add. The Event Stream Set Configuration screen appears.

Figure 17–2 Events - Stream Set Configuration Screen

	I/O:	Type:	Accumulation Rule:	Subtype:	Creator:	Enable Totals:
Base Price:	Input	Price	Measure	Price (Base)	Local	
Promo Price:	Output	Price	Measure	Price (Current)	Local	
Base Sales Forecast:	Input	Calculated Stream 19	Movement	Calculated Str19.1	Local	<input type="checkbox"/>
Promo Sales Forecast:	Output	Calculated Stream 19	Movement	Calculated Str19.1	Local	<input type="checkbox"/>
Actual Sales:	Input	Calculated Stream 19	Movement	Calculated Str19.1	Local	<input type="checkbox"/>
DC Order Forecast:	Output	None		None	Local	<input type="checkbox"/>
DSD Order Forecast:	Output	None		None	Local	<input type="checkbox"/>
Forward Buy Forecast:	Output	None		None	Local	<input type="checkbox"/>
On-Hand Inventory:	N/A	None		None	None	<input type="checkbox"/>
Monetary Sales:	N/A	None		None	None	<input type="checkbox"/>

- Enter a Name for the stream set.
- Select from the Type, Subtype, and Creator drop-downs to configure the new stream set. If an exclamation point appears next to any given option, this indicates that the selection is invalid for your configuration. You can select a different option in the drop-down to correct the problem.
- To enable a **Total** row that will display for each stream type when viewing stream data, click the Enable Totals check box.
- Click Save. The Company - Module Config - Events - Stream Set Configuration screen appears.

The new stream set appears in the select box. It can now be edited or deleted by first selecting the stream set and then the appropriate button.

Configuring Labels in the Events Module

Oracle Retail VCC allows you to tailor custom fields and labels that will appear on the Events module screens if you opt to display them.

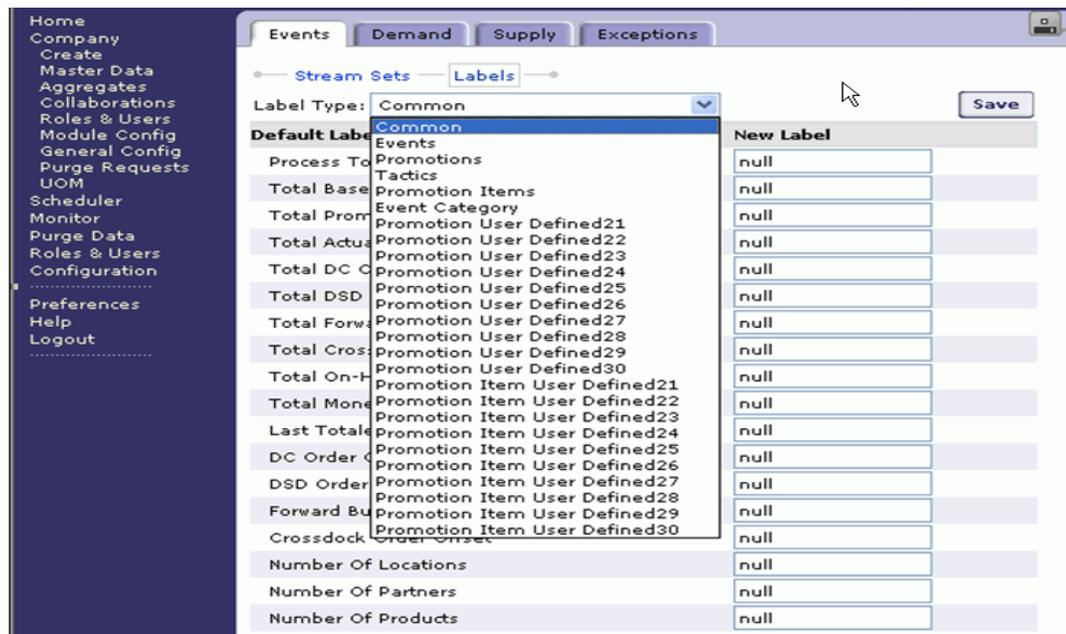
The possible configurations for these fields include

- designating a custom label that will display in conjunction with the text entry box on the screen
- showing the field you have configured, or hiding it from the user altogether
- adding a default value the field will contain

To configure labels and fields

- Select **Company - Module Config** from the VCC menu
- Pick a company from the **Company Chooser**, if necessary
- Click the **Events** tab.
- Select the Labels subtab under Events. The Events - Labels screen appears.

Figure 17-3 Events - Labels Screen



5. The Events Labels comprises of the following Label Types, or categories, within the Events module.
 - Common – Labels that are common throughout the Events module. Changing these labels will make a global Events module change.
 - Events – Labels that appear at the Events level.
 - Promotions – Labels that appear at the Promotions level, on Promotions screens.
 - Tactics – Labels concerning tactics.
 - Promotion Items – Labels appearing at the Promotion Items level.
 - Event Categories - Labels in the **Event Category** enumerated list. This is also used to configure the color-coding of the Event calendar.

Configuring the User Defined Fields in Promotions and Promotion Items

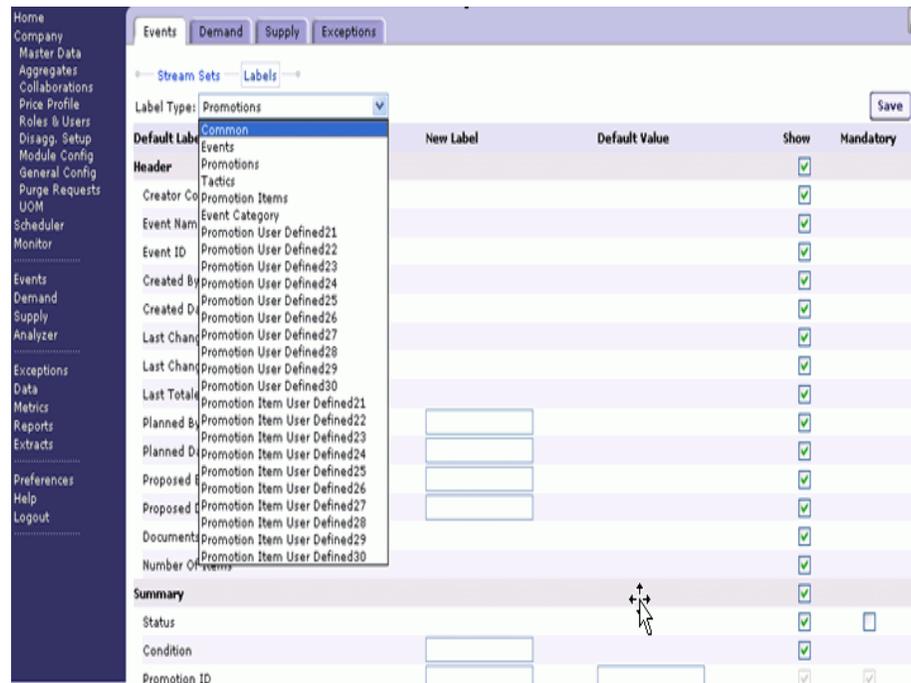
From Release 12.0.2 of VCC onwards, the VCC application includes 20 existing and 40 new user defined fields in the Promotions and Promotion-Items modules. These 60 new fields are configurable and allow the user to designate labels, default values and dropdown options.

Configuring the User Defined Fields

1. Select **Company - Module Configuration - Events tab - Labels**. This will allow the user to access the Promotions, Promotion-Items and UDF dropdown lists configuration.
2. Configure the Promotion UDFs by selecting the "Promotions" tab in the Label Type dropdown list.
3. Configure the Promotion-Item UDFs by selecting the "Promotion-Items" tab in the Label Type dropdown list.

4. Configure the UDF dropdown list values by selecting the UDF field name in the Label Type dropdown list (Ex: Promotion Item-User Defined #21).
5. New UDFs will be listed below the existing ten UDFs in the User Defined section of the Promotions and Promotion-Items screens.

Figure 17-4 Accessing UDF Configuration



Configuring UDFs in Promotions

UDF Text Fields

1. Each UDF contains an editable textbox to enter a label. If this field is blank, the default name is displayed (Ex:Promotion-User Defined #11).
2. Each UDF contains an editable textbox to enter a default value. If this field is blank, the field will be displayed with a null value.
3. Each UDF contains a Show checkbox to configure display on the appropriate Create/Edit screen.
4. Each UDF contains a Mandatory checkbox to configure required usage on the appropriate Create/Edit screen.

Dropdown List UDFs

1. Each UDF contains an editable textbox to enter a label. If this field is blank, the default name is displayed (Ex:Promotion-User Defined #21).

Each UDF will contain a dropdown list with twenty configurable values

2. Each UDF will contain a Show checkbox to configure display on the appropriate Create/Edit screen.

Figure 17-6 Promotion UDFs - continued

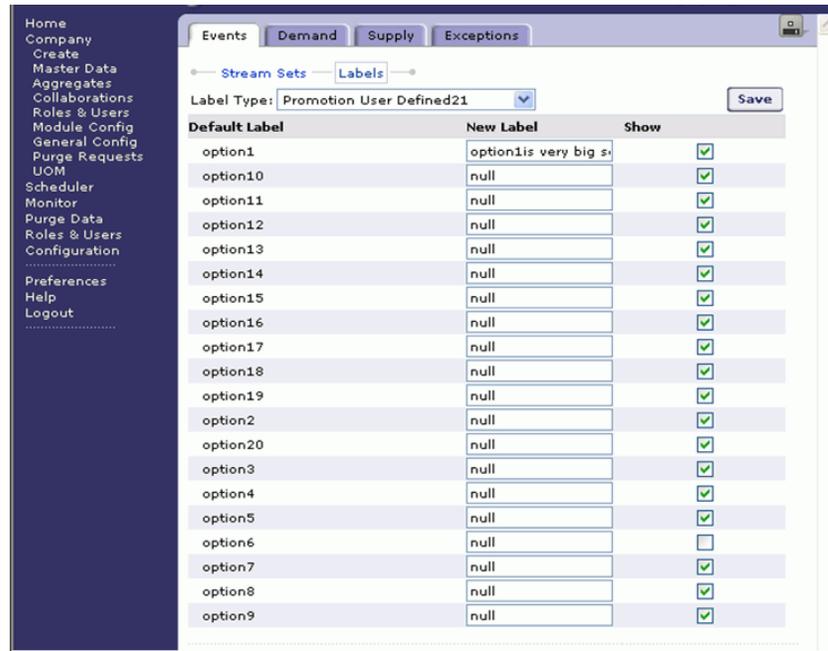
Home	Promotion-User Defined #27	Promotion-User Def	op1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company	Promotion-User Defined #28	Promotion-User Def	option1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Create	Promotion-User Defined #29	Promotion-User Def	option1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Master Data	Promotion-User Defined #30	Promotion-User Def	null	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Aggregates	Metrics				<input checked="" type="checkbox"/>
Collaborations	Inventory Turns	Inventory Turns		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Roles & Users	Number Of Expedited Shipments	Number Of Expedite		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Module Config	Periods Of Supply (Pre-Event)	Periods Of Supply (f		<input checked="" type="checkbox"/>	<input type="checkbox"/>
General Config	Periods Of Supply (Post-Event)	Periods Of Supply (f		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Purge Requests	Location Days Out-Of-Stock	Location Days Out-C		<input checked="" type="checkbox"/>	<input type="checkbox"/>
UOM	Out-Of-Stock (%)	Out-Of-Stock (%)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Scheduler	Service Level (%)	Service Level (%)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Monitor	% Of Promotional Order Consumed	% Of Promotional O		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Purge Data	Category Lift (%)	Category Lift (%)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Roles & Users	Actual Sales Lift (%)	Actual Sales Lift (%)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Configuration	Sales Forecast Accuracy (%)	Sales Forecast Accu		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Preferences	Sales Forecast Error (%)	Sales Forecast Error		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Help	Order Forecast Accuracy (%)	Order Forecast Accu		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Logout	Order Forecast Error (%)	Order Forecast Error		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Due Dates				<input checked="" type="checkbox"/>
	Milestone Date	Milestone Date		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Notification Offset	Notification Offset		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Proposed	Proposed		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Planned	Planned		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Active (Begin Date)	Active (Begin Date)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Completed (End Date)	Completed (End Da		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Tactics				<input checked="" type="checkbox"/>

UDF Dropdown List Values

1. Each dropdown list value contains an editable textbox to enter a label. If this field is blank, the default name is displayed (Ex: Option 1).
2. Each dropdown list value will contain a Show checkbox to configure display in the dropdown list.
3. The UDF dropdown list values will be setup with default values of: "Option1", "Option2", "Option3", etc... through "Option20".
4. The default value of the UDF will be the value listed as Option1.

After setting preferences for these fields, they can be viewed in the Events module - Promotions sections as shown below:

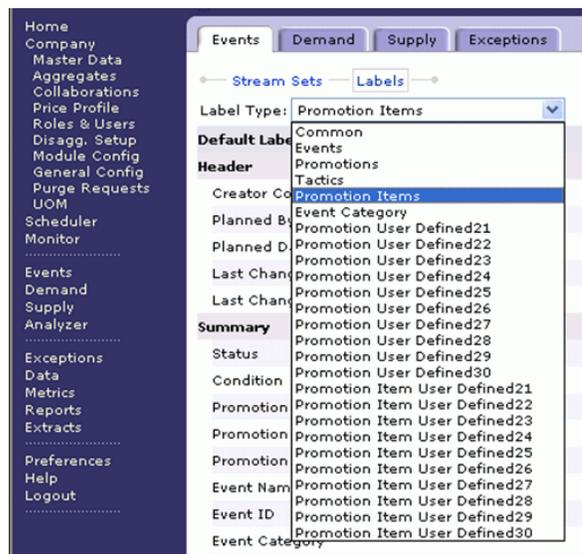
Figure 17-7 UDF Dropdown List Values Configuration



ConfiguringUDFs in Promotion Items

Configuration of UDFs in the Promotion-Items module is exactly the same as configuration of UDFs in the Promotions module. Please see the Configuring UDFs in Promotions section above for details.

Figure 17-8 Accessing the Promotion-Items UDF Configuration



The figure below shows the 30 User defined fields available for the Promotion Items Module.

Figure 17–9 Promotion Item UDF Text Fields

Home	Promotion Item-User Defined #1				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company	Promotion Item-User Defined #2				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Master Data	Promotion Item-User Defined #3				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Aggregates	Promotion Item-User Defined #4				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Collaborations	Promotion Item-User Defined #5				<input type="checkbox"/>	<input type="checkbox"/>
Price Profile	Promotion Item-User Defined #6				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Roles & Users	Promotion Item-User Defined #7				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Disagg. Setup	Promotion Item-User Defined #8				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Module Config	Promotion Item-User Defined #9			Yes ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
General Config	Promotion Item-User Defined #10			Yes ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Purge Requests	Promotion Item-User Defined #11				<input checked="" type="checkbox"/>	<input type="checkbox"/>
UOM	Promotion Item-User Defined #12				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Scheduler	Promotion Item-User Defined #13				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Monitor	Promotion Item-User Defined #14				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Events	Promotion Item-User Defined #15				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demand	Promotion Item-User Defined #16				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Supply	Promotion Item-User Defined #17				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analyzer	Promotion Item-User Defined #18				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Exceptions	Promotion Item-User Defined #19				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data	Promotion Item-User Defined #20				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Metrics	Promotion Item-User Defined #21			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reports	Promotion Item-User Defined #22			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Extracts	Promotion Item-User Defined #23			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Preferences	Promotion Item-User Defined #24			test ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Help	Promotion Item-User Defined #25			option1 ▾	<input type="checkbox"/>	<input type="checkbox"/>
Logout	Promotion Item-User Defined #26			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ORACLE	Promotion Item-User Defined #27			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Promotion Item-User Defined #28			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Figure 17–10 Promotion Item UDF Text Fields - continued

Home	Promotion Item-User Defined #18				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company	Promotion Item-User Defined #19				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Master Data	Promotion Item-User Defined #20				<input checked="" type="checkbox"/>	<input type="checkbox"/>
Aggregates	Promotion Item-User Defined #21			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Collaborations	Promotion Item-User Defined #22			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Price Profile	Promotion Item-User Defined #23			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Roles & Users	Promotion Item-User Defined #24			test ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Disagg. Setup	Promotion Item-User Defined #25			option1 ▾	<input type="checkbox"/>	<input type="checkbox"/>
Module Config	Promotion Item-User Defined #26			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
General Config	Promotion Item-User Defined #27			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Purge Requests	Promotion Item-User Defined #28			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
UOM	Promotion Item-User Defined #29			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Scheduler	Promotion Item-User Defined #30			option1 ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Monitor						
Events						
Demand						
Supply						
Analyzer						
Exceptions						

The remaining User Defined Fields ranging from 21 - 30 is as shown below:

Figure 17–11 UDF Dropdown List Configuration

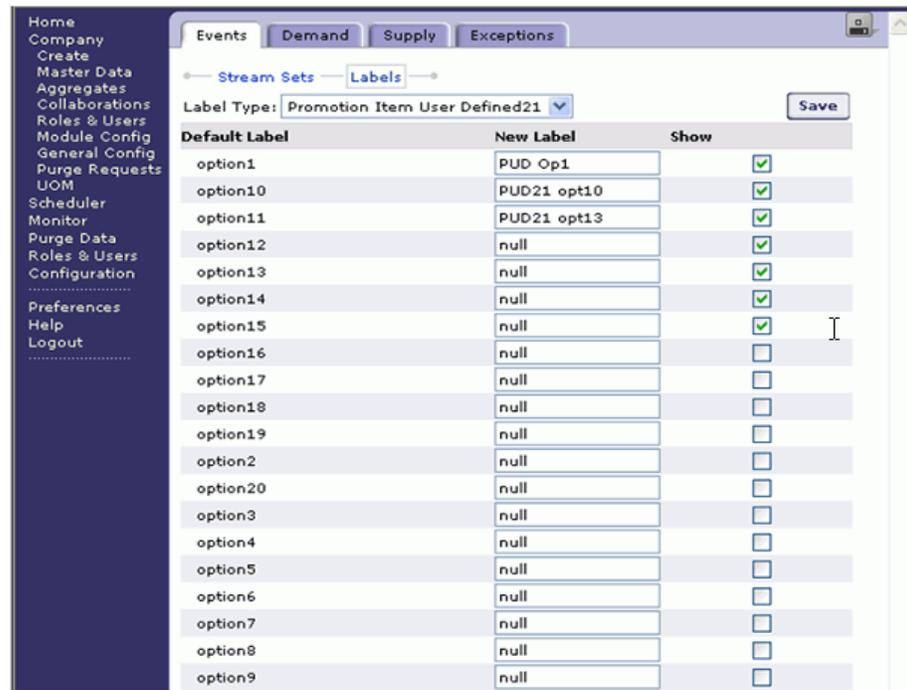
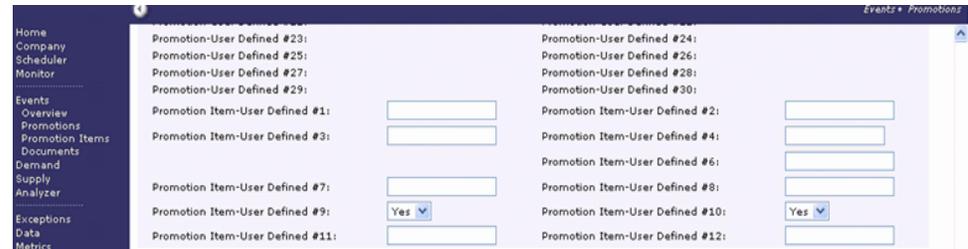


Figure 17–12 UDF fields displayed in the Promotion-Items Create/Edit Screen



Managing Supply Module Stream Set for a Company

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

Supply module configuration allows you to specify the streams used to calculate safety stock, projected inventory, receipt forecasts, and shipment forecasts. To calculate this information you must identify the streams used for your consumption forecast, actual consumption, inventory, safety stock, if it is from a stream, and up to five expected arrival streams. You can create as many stream sets as required for your supply calculations.

Some guidelines for creating stream sets include the following:

- All output streams must be unique.
- At least one output stream must be defined.
- Output streams cannot be the same as any input stream except for the Inventory input stream. The Inventory input stream and output stream can be the same stream.

- Balance and Measure streams cannot be used for the shipment forecast or receipt forecast output streams for policies using telescoping period overlays.
- Measure streams cannot be used as input or output streams for policies at the aggregate level.

To select streams for a Supply calculation:

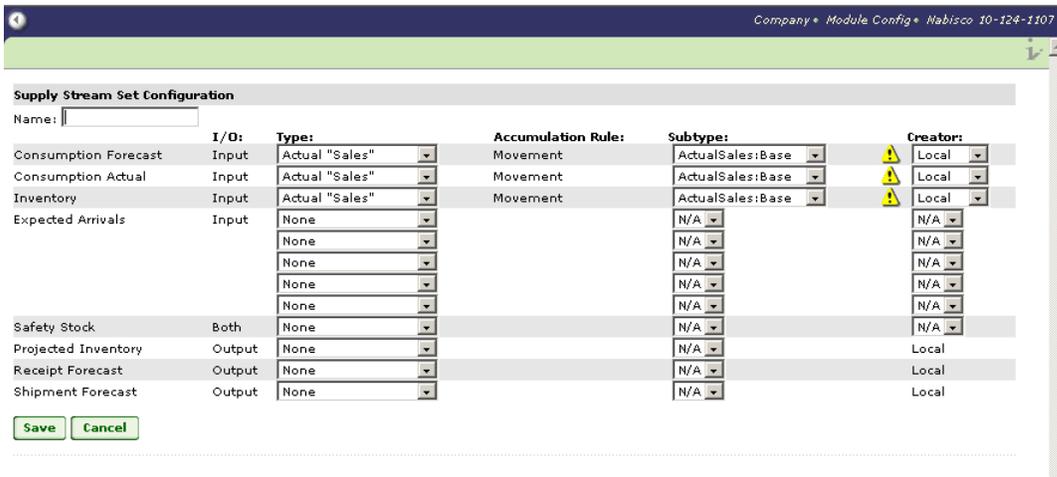
1. Select **Company - Module Config** from the VCC menu and click the **Supply** tab.

Figure 17-13 Company - Module Config Screen



2. Click **Add** to create a new stream set or **Edit** to edit an existing one.

Figure 17-14 Company - Module Config - Edit Screen



3. If you are creating a new stream set for the Supply module, enter its name in the **Name** field. When you are creating the Supply Policy for this module, the stream set name appears in the Supply Policy screen in the **stream set** drop-down list.
4. In the **Consumption Forecast** drop-down list, select the stream, subtype, and creator that you are using as your Consumption forecast.

Note that if a yellow triangle with a black exclamation point appears next to the creator column for a stream, it means you have selected a creator who does not have edit access to the stream. For example, if only a buyer company is allowed to edit a stream and the partner you have selected is the seller company, you must change your creator. Alternately, though less likely, the supervisor for the hub may need to change the configuration for whomever edits that stream.

5. In the **Consumption Actual** drop-down list, select the stream, subtype and creator that you are using as your Consumption Actual stream.

6. In the **Inventory** drop-down list, select the stream, subtype and creator that you are using as your Inventory stream.
7. In the **Expected Arrivals** drop-down list, select the stream, subtype and creator or streams you are using as your Expected Arrivals forecast. You can specify **none** for this field. These streams are used as input to calculate the output streams: Safety Stock, Projected Inventory, Receipt Forecast, and Shipment Forecast.
8. In the **Safety Stock** drop-down list, select the stream, subtype and creator that you are using as your Safety Stock forecast, or select **none**.
9. In the **Projected Inventory** drop-down list, select the stream and subtype that you are using as your Projected Inventory forecast.
10. In the **Receipt Forecast** drop-down list, select the stream and subtype that you are using as your Receipt forecast.
11. In the **Shipment Forecast** drop-down list, select the stream (or streams) and subtype you are using as your Shipment forecast. These streams are used as output from calculations performed on the input streams: Consumption Forecast, Consumption Actual, Inventory, and Expected Arrivals.

The Safety Stock stream is an output stream for the Safety Stock calculation, but an input stream for the Supply Policy calculation.
12. Click Save.

Setting and Viewing the Shipping/Receiving Calendar for Supply

Setting and Viewing the Shipping/Receiving Calendar for Supply

Access To This Feature: Superadmin, Admin, Manager

The shipping/receiving calendar for Supply allows you to block out dates for which you are not available to ship or receive. If you are a seller, you ship goods; if you are a buyer, you receive goods.

You can view your partner's shipping/receiving calendar and view blocked dates; and, if you are using a daily database, the superuser/serveradmin, may give you access to edit your partner's shipping/receiving calendar.

To set shipping/receiving Supply blocked dates

1. Select **Company - Module Config** from the VCC menu and click the **Supply** tab.

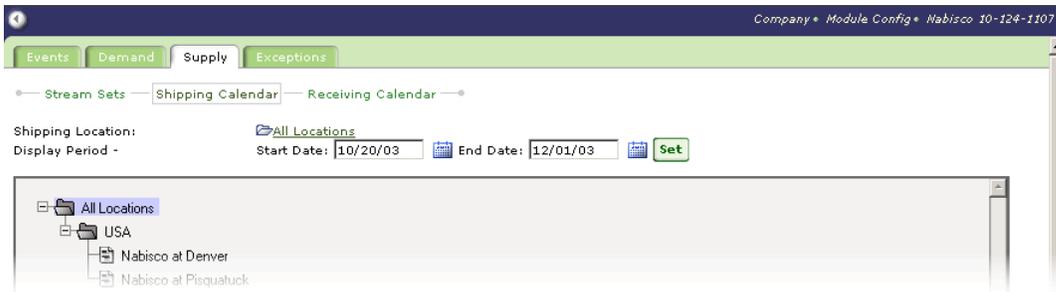
Figure 17–15 *Company - Module Config - Supply Screen*



2. Click **Shipping Calendar** if you are a seller and wish to set blocked dates; or **Receiving Calendar** if you are a buyer and wish to set blocked dates. If allowed, you can set blocked dates for your partner. In this case, if you are a seller, you can select **Receiving Calendar**; if you are a buyer, you can select **Shipping Calendar**.

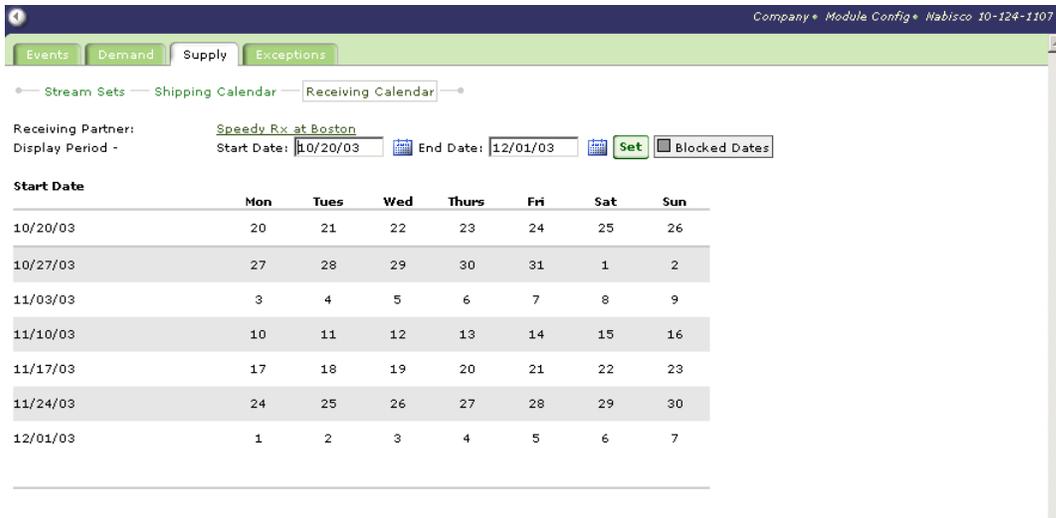
Even if you cannot set blocked dates for your partner, you may view them by clicking the appropriate link.

Figure 17–16 Company - Module Config - Supply - Shipping Calendar Screen



3. If you are a buyer, for a shipping calendar, select a parameter from the partner hierarchy; for a receiving calendar, select a location from the location hierarchy. (If you are a seller, do the reverse.)
4. From the **Display Period** select boxes, select the start and end dates to be displayed. This is for display purposes only. You can change the display setting at any time. The shipping/receiving calendar appears for the date range you selected.

Figure 17–17 Company - Module Config - Supply - Shipping Calendar - Display Periods Screen



5. You now can click on any date to block it. The date is highlighted in grey. (If the date selected is in the first row, the date can act as a base marker for the Save options if you select **Save First Row for All Displayed Periods**.) You have three Save options for the selected date: **Save First Row for All Displayed Periods**, **Save First Row for All Periods**, or **Save Displayed Periods**. If you check the **Save First Row for All Displayed Periods** radio button and click **Save**, all the displayed dates under the selected date are highlighted and marked as blocked. If you select **Save First Row for All Periods**, all periods in the entire database (displayed or not) are highlighted and marked as blocked. If you select **Save Displayed Periods**, only the periods highlighted are marked as blocked.

You can select multiple random dates that are not in a row, save them as **Save Display Periods**, and they will be marked as blocked.

Figure 17–18 Display Period

Start Date	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
01/06/03	6	7	8	9	10	11	12
01/13/03	13	14	15	16	17	18	19
01/20/03	20	21	22	23	24	25	26
01/27/03	27	28	29	30	31	1	2
02/03/03	3	4	5	6	7	8	9
02/10/03	10	11	12	13	14	15	16
02/17/03	17	18	19	20	21	22	23

Managing Demand Module Stream Set for a Company

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

Demand module configuration allows you to specify the streams used to calculate a forecast. To calculate this information, you must first identify the history stream used for your Demand forecast and the output stream for the demand forecast. You can create as many stream sets as required for your Demand calculations.

To select streams for Demand calculation

1. Select **Company - Module Config** from the VCC menu and click the **Demand** tab.
2. Click **Add** to create a new set of Demand stream sets or **Edit** to edit an existing one.

Figure 17–19 Demand Stream Set Configuration Screen

3. If you are creating a new stream set for the Demand module, enter its name in the **Name** field. When you are creating the Demand Policy for this module, the stream set name appears in the Demand Policy screen in the **Stream Set** drop-down list.

Note that if a yellow triangle with a black exclamation point appears next to the creator column for a stream, it means you have selected a creator who does not have edit access to the stream. For example, if only a buyer company is allowed to edit a stream and the partner you have selected is the seller company, you must change your creator. Alternately, though less likely, the supervisor for the hub may need to change the configuration for whomever edits that stream.

4. Select the stream type from the Type drop-down.
5. Select the subtype from the Subtype drop-down.

6. Select whether the Creator is local or partner.
7. Click **Save**.

Configuring E-Mail for the Exception Module

Within Exceptions, during criteria creation, you can elect to send e-mail alerts to specific users when exceptions are triggered by that criteria (for more information on setting up e-mail alerts see <CROSS REF>). The specific format or layout of these e-mail alerts is configurable in the Company - Module Config - Exceptions tab, as seen below.

Figure 17–20 Company - Module Config - Exceptions Screen

The E-mail Alert Configuration section of the Exceptions tab permits the following to be configured:

- Default Format – Select whether you wish the e-mail to be Plain Text or HTML format. See [Sample Exception Inbox E-Mail Alerts](#).
- Hidden Columns – Select which columns you do not want to display in the e-mail by moving column header names from the **Visible** to **Hidden** select box with the left/right arrows.

Note: View Exception, Criteria Name, and Inbox columns cannot be moved to the **Hidden**, and will be visible in all exception e-mail alerts.

- Reorder Columns – Reorder columns by moving selected column headers up or down with the up/down arrows.
- Multi-Column Sort Order – Select which column contents should be sorted in what order. Note that columns must first be in the **Visible** box in order to be appear in the Multi-Column Sort Order **Select** box.

Note: E-mail alerts will contain both Group Exceptions and Individual Exceptions. Most of the E-mail Alert Configuration settings pertain to Individual Exception alerts. Group Exception format will use the same Default Format, and the same localization settings (i.e., Number, Date, Time Formats, and Time Zone). Columns are not sortable or allowed to be hidden for the Group Exceptions displayed in e-mail alerts.

Sample Exception Inbox E-Mail Alerts

Links contained in the HTML and plain text e-mail will return you to VCC's Exception Inbox screen, and Exception Detail views. The Group Inbox links will take you to the Group Inbox screen that displays the selected context and exceptions.

Figure 17-21 Sample HTML E-Mail Alert

Individual Exceptions																
Criteria Name	Severity	Go To	Go To	Product	Local	Partner	Variance	Source	Compared	Percent	Created	Status	UOM	Type 1	Type 2	Offset Period
I3	Medium	Inbox	View Exception	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	20.0	62.0	42.0	47.62	01/09/03 12:01:20	Active	Base Units	POS Forecast (Units)-POS Forecast (Seas)	POS Forecast (Units)-POS Forecast (Seas)	01/12/03
I3	High	Inbox	View Exception	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	30.0	52.0	22.0	136.36	01/09/03 12:01:20	Active	Base Units	POS Forecast (Units)-POS Forecast (Seas)	POS Forecast (Units)-POS Forecast (Seas)	01/12/03
I3	Medium	Inbox	View Exception	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	20.0	72.0	52.0	38.46	01/09/03 12:01:20	Active	Base Units	POS Forecast (Units)-POS Forecast (Seas)	POS Forecast (Units)-POS Forecast (Seas)	01/12/03
Group Exceptions																
Go To	Criteria Name	Period	Product	Local	Partner	Created	Status									
Group Inbox	CO&PO	01/10/03	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22	Active									
Group Inbox	CO&PO	01/11/03	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22	Active									
Group Inbox	CO&PO	01/12/03	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22	Active									
Group Inbox	CO&PO	01/10/03	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22	Active									
Group Inbox	CO&PO	01/11/03	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22	Active									
Group Inbox	CO&PO	01/12/03	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22	Active									
Group Inbox	CO&PO	01/10/03	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22	Active									
Group Inbox	CO&PO	01/11/03	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22	Active									
Group Inbox	CO&PO	01/12/03	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:22	Active									
Group Inbox	CO	-	Planters Holiday Pack	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:23	Active									
Group Inbox	CO	-	Planters Cashews	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:23	Active									
Group Inbox	CO	-	Planters Mixed Nuts	Nabisco at Pisquatuck	Speedy Rx at Boston	01/09/03 12:01:23	Active									
Group Inbox	PO	01/10/03				01/09/03 12:01:23	Active									
Group Inbox	PO	01/11/03				01/09/03 12:01:23	Active									
Group Inbox	PO	01/12/03				01/09/03 12:01:23	Active									

Figure 17-22 Sample Plain Text E-Mail Alert

Individual Exceptions

Criteria Name: I3
Severity: Medium
View Inbox : https://diana1/estrella/jsp/common/frames.do?screen%3Dexceptioninbox%26subscreen%3Dindividual_exception_inbox%26location%3D9%26partner%3D4%26prodleaf%3Dtrue%26product%3D0125468712
View Exception: <https://diana1/estrella/jsp/common/frames.do?screen%3DdatastreamsDefaultView%26exceptionid%3D282%26location%3D9%26partner%3D4%26prodleaf%3Dtrue%26product%3D0125468712>
Product: Planters Mixed Nuts
Local: Nabisco at Pisquatuck
Partner: Speedy Rx at Boston
Variance: 20.0
Source: 70.0
Compared: 50.0
Percent: 40.0
Created: 01/09/03 14:04:59
Status: Active
UOM: Base Units
Type1: POS Forecast (Units)-POS Forecast (Seas)
Type2: POS Forecast (Units)-POS Forecast (Seas)
Offset:
Period: 01/10/03

Group Exceptions

View Group Inbox : https://diana1/estrella/jsp/common/frames.do?screen%3Dexceptioninbox%26subscreen%3Dgroup_exception_inbox%26location%3D9%26partner%3D4%26prodleaf%3Dtrue%26product%3D0125468712
Criteria Name: Lang-COPO
Period: 01/10/03
Product: Planters Mixed Nuts
Local: Nabisco at Pisquatuck
Partner: Speedy Rx at Boston
Created: 01/09/03 12:57:11
Status: Active

View Group Inbox : https://diana1/estrella/jsp/common/frames.do?screen%3Dexceptioninbox%26subscreen%3Dgroup_exception_inbox%26location%3D9%26partner%3D4%26prodleaf%3Dtrue%26product%3D0125468712
Criteria Name: Lang-COPO
Period: 01/11/03
Product: Planters Mixed Nuts
Local: Nabisco at Pisquatuck
Partner: Speedy Rx at Boston
Created: 01/09/03 12:57:11
Status: Active

Creating Product Price Profiles

This chapter contains the following topics:

- [About Product Price Profiles](#)
- [Creating a Product Price Profile with the Company - Price Profile - Create Tab](#)

About Product Price Profiles

A **product price profile** defines the base price of a product for a specific time period for a specific collaboration. You can create multiple profiles for a product reflecting different prices for different time periods. For example, you might want to create a specific price for snow shovels during the winter that differs from the price of snow shovels during the summer. Before creating a price profile, you should define the time periods in your forecast as well as your trading partner and trading partner locations.

A product price profile is always defined in terms of a collaboration between your local company location and your partner's location. You can select any leaf-level location or location folder, and any leaf-level product or product folder, partner location, or partner location folder.

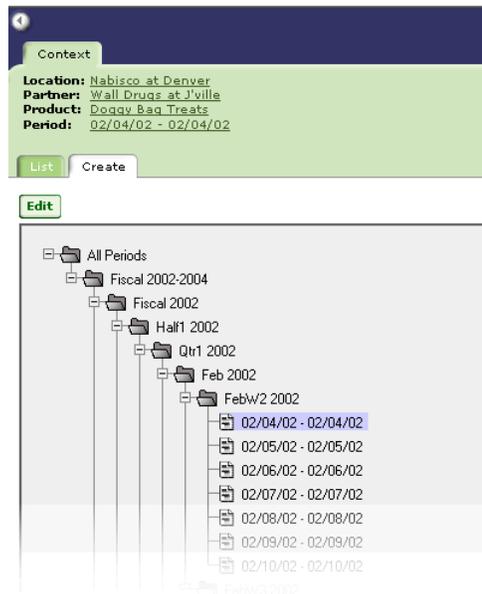
Only users with administrative privileges can create a product price profile. Superusers and ServerAdmins cannot create a price profile because the superuser/serveradmin roles are not associated with any specific company. The superadmin role, however, can create a product price profile only for her own company since a superadmin is always associated with a company.

Creating a Product Price Profile with the Company - Price Profile - Create Tab

To create a product price profile

1. Click the **Company - PriceProfile** in the VCC menu.
2. Click the **Create** tab.

Figure 18–1 Company - PriceProfile - Create Screen



3. Select each context level at which you wish to create price profiles.
4. Click **Edit**.
5. Enter the base price in the **Base Price** field.

Figure 18–2 Base Price Field



6. Click **Set** to set the base price, or click **Cancel** to return to the **List** screen.

Managing Company Aggregates

This chapter contains the following topics

- [About Aggregates](#)
- [Creating a Data Aggregate with the Company - Aggregates - Create Tab](#)
- [Viewing Aggregates with the Company - Aggregates - List Tab](#)
- [Deleting Aggregates with the Company - Aggregates - List Tab](#)

About Aggregates

An **aggregate** is a convenient way of grouping items that allows you to view totals for the items in the group rather than the individual figures for all the items. Rolling up totals is an indispensable way of viewing figures for entire product folders, or viewing the figures for large geographic areas that contain many partner locations or many of your own locations. For example, you can create an aggregate that easily allows you to view the sales figures for a specific product for all your trading partners.

To obtain a data stream total or aggregate, you must indicate to Oracle Retail VCC exactly what it is you are totalling. Oracle Retail VCC operates on contexts that include

- Your location or location category
- Your partner's location or location category
- The products on which you and your partner collaborate
- The time period
- The data stream (except those whose accumulation rule is **measure**.)
- The unit of measure, which can be the base unit of measure, a statistical factor, currency, or loads. To aggregate using statistical units or loads, you must have supplied a statistical factor or a load factor for the product. If you create an aggregate based on currency, there must be a base price established or a promotional price for the time period for which you are aggregating.

To create the aggregate, you must select the context for the aggregate. The combination of selections on these hierarchies creates the aggregate **context**.

When you create an aggregate, you can create the aggregate

- based on the **sum** of all the leaf nodes in the category. This is called **sum**.
- for each and every leaf node in the selected category. This is called any.
- for both sum and any.

By default, the aggregate is created for the sum of all entries in the category if you selected a category.

Clicking on a category changes the category to a specific color. You can change the color of a selection to purple, green, or yellow by successively clicking on it. The meaning of each color is as follows:

- Purple – aggregate on folder
- Green – select individual locations
- Yellow – both

Sum/Any/Both does not apply to time periods. Use the period overlay feature in the data streams view to view data summed across time periods.

Creating a Data Aggregate with the Company - Aggregates - Create Tab

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

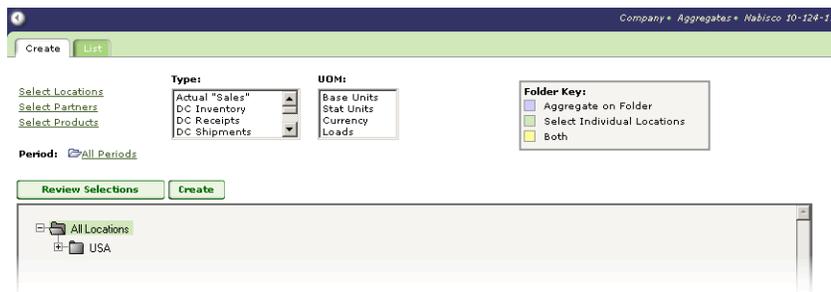
Before you create an aggregate, you should be aware of the following:

- An aggregate must contain at least one category in the context. Every element in the context cannot be at the leaf level.
- You can create aggregates only for the products on which you and your partner collaborate. Oracle Retail VCC automatically determines which of the contexts you select have collaborations. If none of the contexts you select contains a collaboration, you get an error screen message.

To create an aggregate

1. Load the company for which you want to create aggregates using the company chooser (superuser/serveradmin only).
2. Select **Company -Aggregates** from the VCC menu. The aggregates screen appears. Ensure that the **Create** tab is selected to create the aggregate

Figure 19–1 Company -Aggregates- Create Screen



3. From the Type selection box, select the streams for which you want to create the aggregate. (You can select multiple, contiguous data streams using Shift-Click, or multiple, non-contiguous data streams using Control-Click.)
4. From the UOM selection box, select the unit(s) of measure on which you want to aggregate: “Base Units,” “Stat Units,” “Currency,” or “Load.” Multiselection is available

5. Click Select Locations. Select your location or locations. Highlight individual locations to create an aggregate for each location highlighted. Highlight a location category to roll up all the locations under the category into a single aggregate
6. Select "Aggregate on Folder" (purple), "Select Individual Locations" (green), or "Both" (yellow) for the category by clicking on it until it changes to the appropriate color. "Aggregate on Folder" is the default.

Note: Note that you can select multiple folders so be sure to highlight only the category or folders you require.

7. Click Select Partners. Select a partner location or locations. Highlight individual partner locations to create an aggregate for each location highlighted. Highlight a partner location category to roll up all the partner locations under the category into a single aggregate
8. Select "Aggregate on Folder" (purple), "Select Individual Locations" (green), or "Both" (yellow) for the category by clicking on it until it changes to the appropriate color. "Aggregate on Folder" is the default
9. Click Select Products. Select a product or products. Highlight individual products to create an aggregate for each product highlighted. Highlight a product category to roll up all the products under the category into a single aggregate
10. Select "Aggregate on Folder" (purple), "Select Individual Locations" (green), or "Both" (yellow) for the category by clicking on it until it changes to the appropriate color. "Aggregate on Folder" is the default
11. Click All Periods. Select the period category for which you want to create the aggregate. You cannot select a leaf-level period, but all aggregates you create are created on leaf-level periods. For example, if you highlight "March," and there are four weekly periods in March, four aggregates are created, one for each period.

Note: An aggregate does not sum the figures for multiple periods. It sums the figures for the items in the context for each individual period.

12. Click Review Selections. The Selected Aggregations screen appears showing the aggregates you are about to create. Stream types and UOMs are listed at the top of the screen. Each row in the list represents a distinct context, but not a distinct context/stream type/uom. Aggregates will be created for each stream type/uom combination for each context in the list.

Figure 19–2 Selected Aggregations screen

Selected Stream Types : Actual "Sales", DC Inventory, DC Receipts, DC Shipments
 Selected UOMs : Base Units, Stat Units, Currency, Loads,

Start ID: End ID:

Displaying 1-70 of 70

ID	Location	Partner	Product	Period	
1	Nabisco at Pisquatick	Drug Stores	tt	Fiscal 2002-2004	<input type="checkbox"/>
2	Nabisco at Pisquatick	Buyer Non Local Partner1	Planters	Fiscal 2002-2004	<input type="checkbox"/>
3	USA	Drug Stores	Planters	Fiscal 2002-2004	<input type="checkbox"/>
4	USA	Buyer Non Local Partner1	Planters Mixed Nuts	Fiscal 2002-2004	<input type="checkbox"/>
5	USA	Speedy Rx at Boston	tt	Fiscal 2002-2004	<input type="checkbox"/>
6	Nabisco at Denver	Drug Stores	Flavor Snacks	Fiscal 2002-2004	<input type="checkbox"/>
7	Nabisco at Denver	Drug Stores	Original Milkbone Biscuits	Fiscal 2002-2004	<input type="checkbox"/>
8	USA	Buyer Non Local Partner1	Planters Cashews	Fiscal 2002-2004	<input type="checkbox"/>
9	Nabisco at Denver	Wall Drugs at Redwing	Planters	Fiscal 2002-2004	<input type="checkbox"/>
10	Nabisco at Denver	Wall Drugs at St. Cloud	Planters	Fiscal 2002-2004	<input type="checkbox"/>
11	Nabisco at Denver	Drug Stores	Doggy Bag Treats	Fiscal 2002-2004	<input type="checkbox"/>
12	Nabisco at Denver	Wall Drugs at J'ville	Planters	Fiscal 2002-2004	<input type="checkbox"/>
13	Nabisco at Pisquatick	Drug Stores	Planters Mixed Nuts	Fiscal 2002-2004	<input type="checkbox"/>
14	Nabisco at Pisquatick	Speedy Rx at Boston	Planters	Fiscal 2002-2004	<input type="checkbox"/>
15	Nabisco at Denver	Drug Stores	Planters Mixed Nuts	Fiscal 2002-2004	<input type="checkbox"/>
16	Nabisco at Pisquatick	Quick Stop at Manhattan	Planters	Fiscal 2002-2004	<input type="checkbox"/>

If there are no valid aggregates to be created, an error screen appears.

Note: You can also create aggregates without Reviewing Selections by clicking the "Create" button on the Company - Aggregates - Create screen.

- Click the check box in the "Delete" column next to any aggregate you do not want to create and click Delete or enter the Start ID and End ID in the Mark Entries field to mark entries to be deleted.

Note: You can select/deselect all the aggregates on the page by clicking the "Check" icon at the top of the "Delete" column. You can sort the list by any of the underlined column headings.

- Click Back if you want to return to the previous screen to change your selections.

- Click Create if you are ready to proceed.

You can view created aggregates by clicking the **List** tab or in the data streams view screen.

Viewing Aggregates with the Company - Aggregates - List Tab

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

To view the aggregates you have created

- Select your company (superuser/serveradmin only).
- Select **Company - Aggregates** from the VCC menu and click the **List** tab. Set the context for the aggregates you want to view by selecting the location, partner, and product.

3. Select the type of data streams you wish to view in the Type selection box. The Type selection box allows multiple data streams, or a specific set of data streams, to be selected.
4. Select the units of measure you wish to display in the UOM selection box. The UOM selection box allows one or multiple UOMs to be chosen for display.
5. If you wish to see a list of aggregates **at and below** the Location/Partner/Product folder, check the At and below Location/Partner/Product check box.
6. Click the **Set** button. If aggregates are available for the selected context, they appear in a list.

The aggregates can be displayed either **at and below** the location/partner/product or **at** the location/partner/product context. Multi-selecting on the Type and UOM options gives you the ability to limit the list to only aggregates of a specific UOM or a specific set of UOMs. The list may be sorted by location, partner, product, type, number of aggregates or UOM by clicking on the appropriate column header.

The Company - Aggregates - List screen displays a list of items that are unique at the Local, Partner, Stream Type, Product, and UOM combination level. Periods can be viewed by drilling down through the number link located in the **Number Of Aggregates** column. The number link indicates the number of periods you will see upon drilling down. It is also possible to delete aggregates from this screen.

The total number of items displayed in the list can not exceed 50,000. However, it is possible to set the number of items to be displayed per page. This is configured in the **Results per page** field on the **Company - General Config - Preferences** screen.

Deleting Aggregates with the Company - Aggregates - List Tab

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

To delete aggregates in the list

1. Select your company (superuser/serveradmin only).
2. Select **Company - Aggregates** from the VCC menu and click the **List** tab. Set the context for the aggregates you want to view by selecting the location, partner, and product.
3. Select the type of data streams you wish to view in the Type selection box. The Type selection box allows multiple data streams, or a specific set of data streams, to be selected.
4. Select the units of measure you wish to display in the UOM selection box. The UOM selection box allows one or multiple UOMs to be chosen for display.
5. If you wish to see a list of aggregates **at and below** the Location/Partner/Product folder, check the At and below Location/Partner/Product check box.
6. Click the Set button after choosing your context.
7. If aggregates are available for the selected context, they appear in a list.

To delete specific aggregates under a context you may

8. Check each aggregate you want to delete, or enter a range by entering the ID of the first aggregate you want to delete in the **Start ID** text box and the ID of the last aggregate you want to delete in the **End ID** text box. Click the **Mark Entries** button. Check marks are automatically placed in the delete column for all the aggregates with IDs in the range specified.

9. Click the **Delete** button.

You can select/deselect all the aggregates on the page by clicking the icon at the top of the Delete column. Clicking the Delete button will eliminate all the selected aggregates for that particular page.

You may only select up to 1000 items for deletion at any given time.

Note: Aggregates associated with disaggregation profiles or exception criteria cannot be deleted. They display without a check box in the delete column.

Exporting Aggregates

Aggregates can be exported using the Export Data icon. This is located on the Company - Aggregates - List screen. By selecting this icon, you export Aggregate definitions in the following order:

Creator company Id, Creator Location Id, Partner company Id, Partner Location Id, Global Item Number, Period Begin, Period End, Stream Type code, UOM, Creator Aggregate type, partner aggregate type, product aggregate type

The file you export will resemble the following sample:

```
111,111- 001,111,PartLoc_Test1,Prod_Test1,20020120,20041225,5,1,0,1,1
111,Loc_Test1,111,PartLoc_Test1,Prod_Test1,20020204,20020331,2,1,1,1,1
111,Loc_Test1,111,PartLoc_Test1,Prod_Test1,20020204,20020331,5,1,1,1,1
111,Loc_Test1,111,PartLoc_Test1,Prod_Test1,20020204,20020210,15,1,1,1,1
```

Managing Company Data Stream Disaggregation

This chapter contains the following topics:

- [About Data Stream Disaggregation](#)
- [Profile-Based Disaggregation](#)
- [Proportional Disaggregation](#)
- [Straight Line Disaggregation](#)
- [About Disaggregation Profiles](#)
- [Configuring Disaggregation Factors](#)
- [Configuring Time-Only Disaggregation with the Company - Disagg. Setup - Time Only Subtab](#)
- [Daily Allocation with the Company - Disagg. Setup - Daily Allocation Tab](#)
- [Listing, Viewing, and Editing Disaggregation Profiles with the Company - Disagg. Setup - List Tab](#)

About Data Stream Disaggregation

Oracle Retail VCC provides three methods for data stream disaggregation

- Profile-based disaggregation
- Proportional disaggregation
- Straight Line disaggregation

Each is described below.

Profile-Based Disaggregation

Profile-based disaggregation allows you to select multiple dimensions in a context and time. The disaggregation factors indicate the fraction of the total value that is to be applied to the context. The factors are applied to the data sequentially to create the disaggregated values.

For example, if you want to convert weekly-level data to daily data you can create **disaggregation factors** for each distribution center (East .3, West .2 North .28, South .22) and for each day (Monday .1, Tuesday .14, Wednesday .12, etc.). If the input value is 40 then the east receives 12 which is further disaggregated into 1.2 for Monday, 1.68 for Tuesday, etc.

This frees you from the task of updating hundreds or even thousands of individual data stream items each time the data stream for a category changes. Moreover, the disaggregation (or allocation) of a single value for a category into individual leaf items is applicable only to the context (product, location, and partner) you specify.

You can enter data streams using any of the usual data entry methods – manually or bulk loading using the VCC Integrator – and Oracle Retail VCC automatically allocates the correct values to each of the leaf items in the hierarchy. Prior to entering your data stream data, however, you must define the disaggregation profile that tells Oracle Retail VCC how to allocate the data among the leaf items in a category. For details about the disaggregation profile, see [About Disaggregation Profiles](#)

Data stream disaggregation provides the following benefits

- Allows you to allocate values from higher level folders to leaf items without having to change each leaf item individually.
- Allows you to collaborate with trading partners who use leaf-level forecasts even though your forecasts are not entered at their level of detail (sometimes called the **level of abstraction**).
- Allows you to disaggregate on a **time only** basis taking data that are based on a weekly schedule and disaggregating it into daily data. This allows you to collaborate with partners who forecast on a daily basis. This feature is available only if your forecasts are based on daily time periods.
- Disaggregation profiles are easy to set up.

The ability to enter a single value for a category, and to calculate and assign values to all leaf items in a hierarchy provides increased flexibility when you are comparing data streams with a trading partner. Often, trading partners operate at different **levels of abstraction**. For example, one trading partner may provide values at the product category level while another provides forecasts at the product leaf level. The data stream disaggregation feature makes it easy for a trading partner who only provides data streams at the category level to assign forecast values to leaf items, and then compare them with a trading partner who uses a leaf-level method.

For example, you have a product category called **All Natural Potato Chips**. The forecast value for it is 100. You collaborate with your trading partner on this item, but your trading partner further refines the **All Natural Potato Chips** category into several leaf items: **16 oz. potato chips**, **32 oz. potato chips**, and **Jumbo Pack**. Your problem is to take the forecast value for the entire category (100), which represents an aggregate value for all subfolders, and to allocate it among the leaf items so you can collaborate with your partner on individual product items such as **Jumbo Pack**. Once you have defined the disaggregation profile for the product category, Oracle Retail VCC calculates and assigns the appropriate values for you.

On the other hand, data stream aggregation allows a trading partner who uses the leaf-level forecasting method to roll-up (total or aggregate) individual forecast values for any category and compare them with a trading partner who forecasts at the category level.

Data stream disaggregation and aggregation provide the complete solution to allow trading partners with different forecast methods to synchronize their methods quickly and easily, and to collaborate.

Proportional Disaggregation

Proportional disaggregation does not employ disaggregation profiles. To use proportional disaggregation, data must already exist for the selected context. Equal distribution is performed if data does not exist for the selected context.

Proportional disaggregation compares the aggregate value for a specific context with a new aggregate value for the context. It then determines the percent change between the old value and the new value, and changes each leaf value in the context by the same percentage increase or percentage decrease as the aggregate. For example, if the original aggregate value is 10 and the new value is 15, the percent change is 50% and all leaf items are increased by 50%.

Straight Line Disaggregation

Straight Line Disaggregation distributes an equal percentage of the given Value among each of the leaves. For example, if SpeedyRx had selected a context that resembled the tree below, and they wished to allocate each type of Snack evenly by period across all locations, they would see a distribution similar to the one in See [Straight Line Disaggregation](#) below.

Figure 20–1 North East - SpeedyRx - Snacks

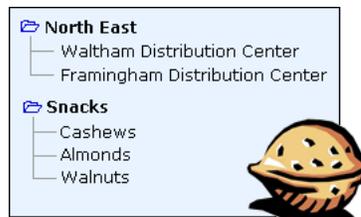


Table 20–1 Straight Line Disaggregation

Periods:	Sept. 1-7	Sept. 8-14	Sept. 15-21
Value:	600	492	300
Waltham - SpeedyRx - Cashews	100	82	50
Waltham - SpeedyRx - Almonds	100	82	50
Waltham - SpeedyRx - Walnuts	100	82	50
Framingham - SpeedyRx, Cashews	100	82	50
Framingham - SpeedyRx - Almonds	100	82	50
Framingham - SpeedyRx - Walnuts	100	82	50

In the example above, each week in September has a designated forecast value to be distributed amongst the leaves in equal parts.

In order to apply Straight Line Disaggregation to your collaboration profiles, you must first enable it.

To enable Straight Line Disaggregation.

1. Click on Company in the menu.
2. Select General Config. The Preferences tab view appears.
3. Change the drop-down called **Enable Straight Line Disaggregation** to yes.
4. Click Save.

You may then create a new Disaggregation Profile in Company - Disagg. Setup - Create which uses Straight Line Disaggregation.

The following tables illustrate the options available for each method when contexts are at various levels of leaf and folder:

Figure 20–2 Context and Period are at aggregate levels. Although only one of them needs to be at aggregate level, choosing to have both at aggregate level is also a possibility

key:		UI Aggregate On			Dataload Aggregate On		
profile	Profile	Context	Period		Context	Period	
straightline	StraightLine		Wk->Day	Other->Day		Wk->Day	Other->Day
proportional	Proportional	profile	profile		profile	profile	
begin/end	Begin/End	proportional	proportional	proportional	straightline	straightline	straightline
	Not Allowed						

Figure 20–3 If Context is at aggregate-level and Period is at leaf-level, you should read the table below as if the Period coluns did not exist

key:		UI Aggregate On			Dataload Aggregate On		
profile	Profile	Context			Context		
straightline	StraightLine						
proportional	Proportional	profile			profile		
begin/end	Begin/End	proportional			straightline		
	Not Allowed						

Figure 20–4 If the Period is at aggregate-level and Context is at leaf-level, you should read the table as if the Context column did not exist

key:		UI Aggregate On			Dataload Aggregate On		
profile	Profile		Period			Period	
straightline	StraightLine		Wk->Day	Other->Day		Wk->Day	Other->Day
proportional	Proportional		profile		profile		
begin/end	Begin/End		proportional	proportional	straightline	straightline	
	Not Allowed						

About Disaggregation Profiles

Note: When you create a disaggregation profile, the associated aggregates are created as well; that is, aggregates are created for the same location/partner/product context and stream_type for each period in the effectivity period of the disaggregation profile. This is specifically for use by the Demand module.

A data stream disaggregation profile is a set of **factors** you enter for a specific context (product, partner, or location category), time period, and stream type and subtype that permits any value entered for a category to be allocated (disaggregated) among leaves in it. The disaggregation factor is a percent of the total aggregate value for the category in the context. For example, if a product category has two leaves and you enter a disaggregation factor of .5 for each, when you load a forecast value of 100 for the category each leaf is allocated 50.

For disaggregation profiles based on existing data for the period, if you subsequently change any leaf-level quantity in the period range used for the disaggregation profile calculation, new disaggregation factors/ratios are calculated for the other product leaves. For example, if you change one of the two leaves in the previously mentioned example to 60, the aggregate total for the category becomes 110. The disaggregation profiles are recalculated as $50/110 = .454$ and $60/110 = .545$ when you run the recalculation tool.

The context (location, partner, product), stream type and subtype and the disaggregation factors are referred to as the disaggregation **profile**. A profile is only valid for the specified time period or **effective date**.

You can develop disaggregation profiles in any one of the following ways:

- manually
- computed – based on existing data

Manually entered disaggregation profiles are appropriate for new products, or for special events that do not reflect historical behavior. More frequently, however, you want to utilize automated factors based upon historical analysis of forecast behavior. Historical analysis takes the historical values for any data stream type you choose by context or period, sums the data for each item, and derives the percentage of each item relative to the category that contains it. Oracle Retail VCC allows you to generate disaggregation profiles based on a data stream's history.

For details on creating disaggregation profiles, see [Configuring Disaggregation Factors](#)

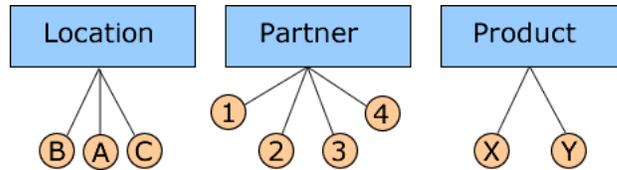
Configuring Disaggregation Factors

Access To This Feature: SuperAdmin, Admin, Manager

1. Select **Company - Disagg. Setup** from the VCC menu. The disaggregation screen appears.
2. Select the Create tab. This screen will show the Context Based subtab as selected.
3. The Manual Entry radio button will also be selected by default. When you enter disaggregation profiles manually, you must enter a numeric value or a percent value for each leaf in the hierarchy context (location, partner, product) you select.

For example, if your context resembled the one below, you might have up to twenty four Collaboration Items.

Figure 20–5 Manual Disaggregation Factors



B - 1 - X B - 2 - X B - 3 - X B - 4 - X
 B - 1 - Y B - 2 - Y B - 3 - Y B - 4 - Y
 A - 1 - X A - 2 - X A - 3 - X A - 4 - X
 A - 1 - Y A - 2 - Y A - 3 - Y A - 4 - Y
 C - 1 - X C - 2 - X C - 3 - X C - 4 - X
 C - 1 - Y C - 2 - Y C - 3 - Y C - 4 - Y

Any value entered for disaggregation at the aggregate context would be multiplied by the factors assigned to each of the partner leaves to determine what value to assign to each leaf-level context. If you enter a zero value for one of the factors, zero is multiplied by the disaggregation value, and the result would be that zero is the value assigned to that leaf.

Note: Note that the **Time Only** subtab and the **Daily Allocation** tab appear only if your base time periods are daily.

For Manual Entry disaggregation

1. Choose one or more Type/Sub-Type(s) from the selection box by holding down the Ctrl key and clicking on individual types, or by holding down the Shift key and selecting multiple types. Note that measure streams cannot be disaggregated so they are not included in the drop-down list.
2. Select the context (Location, Partner, Product, Period) on which you want to disaggregate. Note that one of location, partner, or product must be at the folder level and the other two must be at the leaf-level since disaggregation progresses from the folder level to the leaf level and you cannot disaggregate on two folders at once. You cannot use the root folder for any of these three dimensions to create a disaggregation profile. If you select a Partner category, all the leaf partners in the category with whom you collaborate are assigned a disaggregation value based on the factor.

Figure 20–6 For Manual Entry Disaggregation

The screenshot displays the Oracle Retail VCC configuration interface for manual entry disaggregation. At the top, there are tabs for 'List', 'Create', and 'Daily Allocation'. Below the tabs, there are radio buttons for 'Context Based' and 'Time Only', and a 'Create' button. The main configuration area is divided into two sections: 'Factor Type' and 'Aggregate Target Type-Subtype'. The 'Factor Type' section has two radio buttons: 'Manual' (selected) and 'Computed'. The 'Aggregate Target Type-Subtype' section has a list box containing the following items: 'Actual "Sales"-ActualSales:Base', 'Actual "Sales"-ActualSales;Promo', 'DC Inventory-DC Inventory', 'DC Receipts-DC Receipts', and 'DC Shipments-DC Shipments'. Below these sections is a tree view of locations, starting with 'All Locations', which is expanded to show 'USA', which is further expanded to show 'Nabisco at Denver' and 'Nabisco at Piquatuck'.

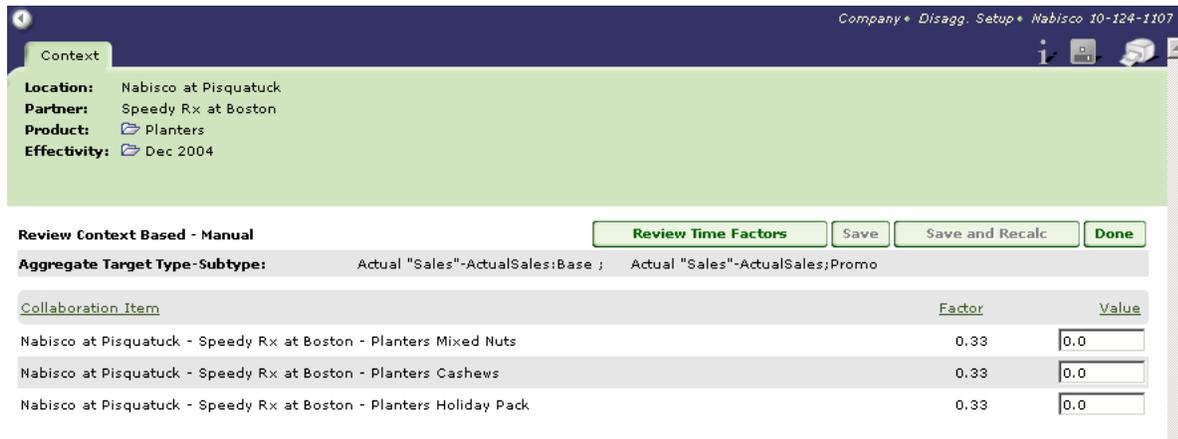
Oracle Retail VCC will automatically calculate the appropriate disaggregation factors for a context based on the historical data for the context.

To configure disaggregation automatically for a context

For disaggregation based on Computed Data

1. a. Choose one or more Type/Sub-Types from the selection box by holding down the Ctrl key and clicking on individual types, or by holding down the Shift key and selecting multiple types.
2. Select specific Source Data from the Type and Sub-Type drop-downs below, and whether or not the dates should encompass a fixed or rolling time period. Note that measure streams cannot be disaggregated so they are not included in the drop-down list.
3. Select the context (Location, Partner, Product, Period) on which you want to disaggregate. Note that one of location, partner, or product must be at the folder level and the other two must be at the leaf-level since disaggregation progresses from the folder level to the leaf level and you cannot disaggregate on two folders at once. You cannot use the root folder for any of these three dimensions to create a disaggregation profile. If you select a Partner category, all the leaf partners in the category with whom you collaborate are assigned a disaggregation value based on the factor.
4. Click the Create button. The screen displaying the requested Collaboration appears.

Figure 20–7 Screen Displaying the Requested Collaboration



5. Reviewing the collaboration allows you the option of entering a new Value for each collaboration item.

For Computed data

1. You may check the Override check box. The Override check box allows you to enter a new number in the text box displayed under the New Value column.
2. When you are finished reviewing the collaboration, hit Save to save and view the collaborations or Done to exit to the List screen without saving. If you check the Override check box, enter a new value, and wish to recalculate based on that new number, click the Save and Recalc button. You may also review time factors from this screen by clicking on the Review Time Factors button.

For Manually entered data

1. Factors that will allocate evenly across all leaves are automatically supplied. You may edit those factors for the folder dimension as required. This can be changed by typing a new value into the text field.
2. Click Save and Recalc or Save.
3. Click Done to return to the list screen.

Configuring Time-Only Disaggregation with the Company - Disagg. Setup - Time Only Subtab

Access To This Feature: SuperAdmin, Admin, Manager

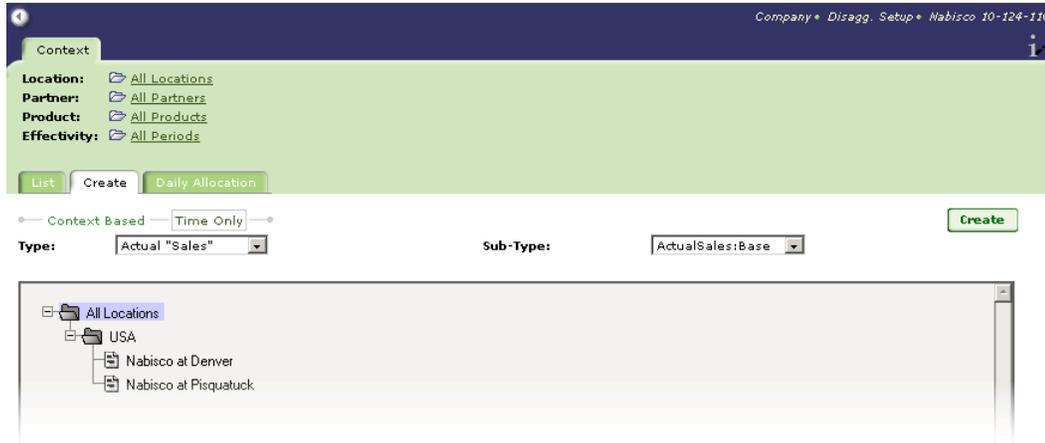
Note: Time buckets must be configured for daily, rather than weekly, UOMs in order to access this feature.

Time-only disaggregation allows you to disaggregate weekly time buckets into daily time buckets. It is available only if your base time periods are daily. A disaggregation profile must have been previously created for the context to access time-only disaggregation. Create profiles from the **Time Only** subtab when you and your trading partner collaborate at leaf-level contexts, but your trading partner generates data in weekly time buckets and you generate data in daily time buckets.

To configure time-only disaggregation

1. Select **Company - Disagg. Setup** from the VCC menu. The disaggregation screen appears.
2. Click the **Time Only** subtab. The **Time Only** disaggregation screen appears.

Figure 20–8 Time Only Disaggregation Screen



3. In the **Time Only** screen, select a context at any level on each dimension (more than one can be at the folder level). A Time-Only profile will be created for each leaf-level collaboration contained in the context you choose. Select a stream type and subtype. Select a context for which you want to assign the same daily allocation profiles for each week. Click **Create**.
4. For each time period, select the daily allocation disaggregation profile you want to use.

Figure 20–9 Time Period for the Daily Allocation Disaggregation

Aggregate Target Type-Subtype: Actual "Sales" - ActualSales:Base Save Done

Begin Periods:	02/04/02	02/11/02	02/18/02	02/25/02
Profile:	Standard	Standard	Standard	Standard
Day 1	0.20	0.20	0.20	0.20
Day 2	0.20	0.20	0.20	0.20
Day 3	0.20	0.20	0.20	0.20
Day 4	0.10	0.10	0.10	0.10
Day 5	0.10	0.10	0.10	0.10
Day 6	0.10	0.10	0.10	0.10
Day 7	0.10	0.10	0.10	0.10

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38

5. Click Save.

Daily Allocation with the Company - Disagg. Setup - Daily Allocation Tab

Access To This Feature: SuperAdmin, Admin, Manager

Note: Time buckets must be configured for daily, rather than weekly, UOMs in order to access this feature.

The Daily Allocation screen allows you to specify how your daily data stream is structured. It lets you specify how to allocate data across the week. You can use the daily allocation setup profiles you create, when creating disaggregation profiles for databases that use daily time buckets. The Daily Allocation profile you create appears in the drop-down list of profiles that appears when setting up a disaggregation profile for a company that uses a database based on daily time buckets.

To specify a data stream daily allocation structure

1. Select **Company - Disagg. Setup** from the VCC menu.
2. Click the **Daily Allocation** tab. The **Daily Allocation** screen appears.

Figure 20–10 Daily Allocation Screen

The screenshot shows the 'Daily Allocation' screen with a green header bar containing 'List', 'Create', and 'Daily Allocation' tabs. Below the header, there are two dropdown menus: 'Profile:' set to 'Standard' and 'Default Daily Allocation:' set to 'Standard'. A table displays allocation factors for each day of the week:

Day 1:	0.20
Day 2:	0.20
Day 3:	0.20
Day 4:	0.10
Day 5:	0.10
Day 6:	0.10
Day 7:	0.10

At the bottom of the screen, there are three buttons: 'New', 'Edit', and 'Save'.

3. Click **New**. In the **Name** field, enter the name for this daily allocation profile.

Figure 20–11 Daily Allocation - Create Profile Screen

The screenshot shows the 'Create Profile' screen with a green header bar containing 'List', 'Create', and 'Daily Allocation' tabs. Below the header, there is a 'Create Profile' section with a 'Name:' label and an empty text input field. Below this, there are seven rows, each with a 'Day' label and an empty input field for the allocation factor:

Day 1:	<input type="text"/>
Day 2:	<input type="text"/>
Day 3:	<input type="text"/>
Day 4:	<input type="text"/>
Day 5:	<input type="text"/>
Day 6:	<input type="text"/>
Day 7:	<input type="text"/>

At the bottom of the screen, there are two buttons: 'Cancel' and 'Save'.

4. Enter the new allocation factors for each weekday and click **Save**. You can use the daily allocation setup profiles you create, when creating disaggregation profiles for databases that use daily time buckets.
5. When you select a Default Daily Allocation from the drop-down, it will appear by default each time you enter the Daily Allocation screen.
6. You can edit a profile by selecting it in the drop-down menu and clicking **Edit**.

Figure 20–12 Daily Allocation - Edit Screen

The screenshot shows the 'Daily Allocation - Edit Screen' interface. At the top, there are three tabs: 'List', 'Create', and 'Daily Allocation', with 'Daily Allocation' being the active tab. Below the tabs is a section titled 'Edit Profile'. The 'Name' field is set to 'Standard'. There are seven rows for 'Day 1' through 'Day 7', each with a corresponding input field containing values: Day 1 (0.20), Day 2 (0.20), Day 3 (0.20), Day 4 (0.10), Day 5 (0.10), Day 6 (0.10), and Day 7 (0.10). At the bottom of the form are two buttons: 'Cancel' and 'Save'.

Listing, Viewing, and Editing Disaggregation Profiles with the Company - Disagg. Setup - List Tab

Access To This Feature: SuperAdmin, Admin, Manager

To delete or edit an existing profile

1. Select **Company - Disagg. Setup** from the VCC menu.
2. Click the **List** tab. The disaggregation profiles defined are displayed.

Figure 20–13 Disaggregation Profiles Display

The screenshot shows the 'Disaggregation Profiles Display' interface. At the top, there is a 'Context' section with links for 'All Locations', 'All Partners', and 'All Products'. Below this is a navigation bar with 'List', 'Create', and 'Daily Allocation' tabs, with 'List' being the active tab. The main area displays a table of disaggregation profiles. The table has the following columns: Location, Partner, Product, Effectivity Period, Type, Sub-Type, User, Creation Date, Factor Type, and Process On Demand. The table contains 10 rows of data, with the first 9 rows having a checkmark in the 'Process On Demand' column and the 10th row having a checkbox.

	Location	Partner	Product	Effectivity Period	Type	Sub-Type	User	Creation Date	Factor Type	Process On Demand
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	10/01/04 - 10/07/04	Actual "Sales"	ActualSales:Base	Dave Wilson	10/15/03 14:06:54	Manual	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	10/01/04 - 10/07/04	Actual "Sales"	ActualSales;Promo	Dave Wilson	10/15/03 14:06:54	Manual	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	10/01/04 - 10/07/04	DC Shipments	DC Shipments	Dave Wilson	10/15/03 14:06:54	Manual	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	10/01/04 - 10/07/04	Finished Goods Inv	Finished Goods Inv	Dave Wilson	10/15/03 14:06:54	Manual	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	10/01/04 - 10/07/04	Inventory (Proj)	Inventory (Proj)	Dave Wilson	10/15/03 14:06:54	Manual	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	10/01/04 - 10/07/04	Shipment Forecast	Ship Forecast Base	Dave Wilson	10/15/03 14:06:54	Manual	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	10/01/04 - 10/07/04	Shipment Forecast	Ship Forecast Promo	Dave Wilson	10/15/03 14:06:54	Manual	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	10/01/04 - 10/07/04	Shipment Forecast	Ship Forecast Adj	Dave Wilson	10/15/03 14:06:54	Manual	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Nabisco at Pisquatuck	Speedy Rx at Boston	Planters	10/01/04 - 10/07/04	Supplier Inv (Units)	Supplier Inv (Units)	Dave Wilson	10/15/03 14:06:54	Manual	<input checked="" type="checkbox"/>
<input type="checkbox"/>	USA	Drug Stores	Pet Foods	02/04/02 - 12/26/04	Sales Forecast	SalesFcstBase	Dave Wilson	10/17/03 17:47:19	Computed	<input type="checkbox"/>

3. To delete a disaggregation profile, click the check box next to the profile and click the **Delete** button.

4. To edit an existing profile, click the colored dot next to the profile. The screens used to create the profile are displayed. Click the **Edit** button. Make any edits necessary in the same manner you would if you were creating the profile and click **Done**.

Figure 20–14 Create Profile Screen

Context

Location: Nabisco at Pisquatuck
Partner: Speedy Rx at Boston
Product: Planters
Effectivity: Disagg Week

Edit Context Based - Manual Review Time Factors Save Save and Recalc Back

Aggregate Target Type-Subtype: Actual "Sales" - ActualSales:Base

Factor Type: Manual Computed

Source Data: Type: Actual "Sales" Sub-Type: ActualSales:Base Source is: Partner

Source Time Type: Fixed Rolling

Source Time Range: Start Date: (mm/dd/yy) End Date: (mm/dd/yy)

Repeat frequency

Dates- * Start Date: 10/20/03 (mm/dd/yy) Time: (HH:mm) Any Time End Date: (mm/dd/yy)

Recurrence: Once

Collaboration Item	Factor	Value
Nabisco at Pisquatuck - Speedy Rx at Boston - Planters Mixed Nuts	0.33	0.0
Nabisco at Pisquatuck - Speedy Rx at Boston - Planters Cashews	0.33	0.0
Nabisco at Pisquatuck - Speedy Rx at Boston - Planters Holiday Pack	0.33	0.0

The number of items displayed on the disaggregation list page is controlled by The **Results per page** field under the **Company Preferences** screen.

Managing Company Collaborations

This chapter contains the following topics:

- [About Collaborations](#)
- [Creating Collaborations Between Trading Partners with the Company Collaborations Screen](#)

About Collaborations

Oracle Retail VCC allows you to bulk load your collaborations using the VCC Integrator, or to enter them manually using Oracle Retail VCC administrator tasks. For details on bulk loading collaborations, see the Oracle Retail VCC Implementor Guide.

Collaboration is central to Oracle Retail VCC. You can configure VCC to manage collaborations between any company location in your location hierarchy with any trading partner location. This chapter describes how to add collaborations using the VCC administrator tasks and how to add the products required for a specific collaboration.

If you want collaboration items created by your partner to appear in your collaboration hierarchy, see [Company - General Config - General Preferences](#).

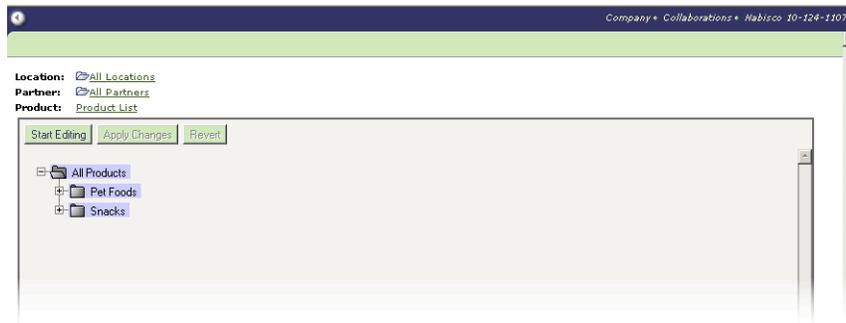
Creating Collaborations Between Trading Partners with the Company Collaborations Screen

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

To create a collaboration manually using the VCC administrator tasks

1. Click the **Company - Collaborations** from the Oracle Retail VCC menu. The **Company Collaboration** screen appears.
2. Select your company from the Company Chooser.

Figure 21–1 Company Collaboration Screen



3. Click **AllPartners** and select the leaf-level partner or partner category location for the collaboration. At the **All Partners** level, all company products are highlighted no matter what the collaborations are. So, when creating or removing collaborations, you must select a lower context. If you add a new partner to a partner category that was previously a collaboration partner category, you must create the collaboration item for the new partner.
4. Click **AllProducts** and select the leaf-level product or product category. If you add a new product to a product category that was previously a collaboration product category, you must create the collaboration item for the new product.
5. Click the **Start Editing** button. The **Stop Editing** button appears.
6. Highlight the items on which you want to collaborate.
7. Click **Apply Changes** to create the collaboration or **Revert** to return to the last state at which **Apply Changes** was selected.
8. Click **Stop Editing**

Note: Any collaborations created when both root nodes (All Partners/All Locations) are selected will be ignored. The changes will appear to be applied when you click **Apply Changes**, but when you click **Stop Editing** the tree will revert to its previous state. You must have one non-root node selected in order to add collaborations.

Also see Company - General Config - General Preferences for information on the Auto Create Collaborations feature. Selecting this option gives your trading partners permission to create collaborations that will appear in your hierarchy.

Managing Roles and Users

This chapter includes the following topics:

- [About Roles and Users](#)
- [An Overview of Oracle Retail VCC Roles](#)
- [Selecting the Appropriate Tree Display](#)
- [Roles & Users Search](#)
- [Creating a New User for a Company with the Company - Roles and Users Screen](#)
- [Copying a User](#)
- [Setting or Editing User Hierarchy Access Rights with the Company - Roles and Users Screen](#)
- [Access Control](#)
- [Assigning Modules to the Users](#)
- [Disabling a User with the Company - Roles and Users Screen](#)
- [Moving a User to a New Role with the Company - Roles and Users Screen](#)
- [Changing a User Password with the Company - Roles and Users Screen](#)

About Roles and Users

Oracle Retail VCC manages read/write access through different levels of security built into the application. These different levels of security are defined by a list of Roles.

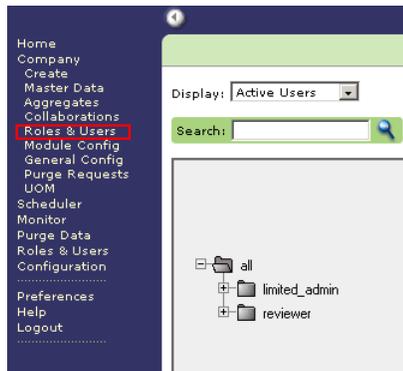
User roles can be viewed and edited through two separate menu options at two different administrative levels:

- See [Company Level Roles & Users](#).
- See [Hub Level Roles & Users](#).

Company Level Roles & Users

The Company - Roles & Users screen displays all user roles for a given company.

Figure 22–1 Company - Roles & Users Screen



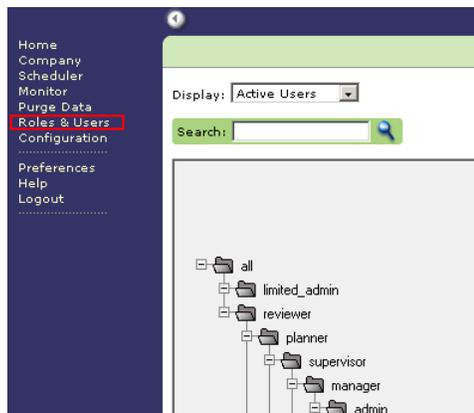
As a company administrator, you can assign users the following roles:

- admin
- manager
- supervisor
- planner
- reviewer
- limited admin

Hub Level Roles & Users

The hub level Roles & Users screen displays all user roles regardless of company. Hub level Roles & Users can only be accessed by superuser and superadmin.

Figure 22–2 Hub Level Roles & Users Screen



Only a superuser or serveradmin can create the user for the superadmin role for a company.

An Overview of Oracle Retail VCC Roles

For details on the functions each role can perform, see <CROSS REF>

- **Superuser** – responsible for setting up all companies on the server, with access to all administrative functions. For more information see <CROSS REF>.

- **Server Admin** – access to all administrative functions except creation of superusers or server administrators.
- **Super Admin** – has exclusive rights to the Oracle Retail VCC Scheduler, is associated with a specific company, and has access to both company-specific administrative tasks as well as client modules.
- **Integrator User** – no access to the client, and not associated with any company. Role exists solely to load data for all companies.
- **Admin** – permits access to all administrative functions except the Scheduler, creating a company, and purging data. An admin can only create price profiles and disaggregation profiles for their own company.
- **Manager** – In addition to all the privileges of the planner role, a manager can create disaggregation profiles, and access the Supply Calender.
- **Supervisor** – In addition to all the privileges of the planner role, a supervisor can create exception criteria and metrics.
- **Planner** – permits read-and-write access to Oracle Retail VCC to create and edit data streams, and create promotional events. A planner has read-only access to exception criteria and metrics. Depending on how VCC is configured, access to partner information, product folders, or specific operations might be restricted by the role or roles to which you belong.
- **Reviewer**– has read-only access to VCC.
- **Limited Admin** – combines admin rights with access to VCC modules.

Selecting the Appropriate Tree Display

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

The user tree defaults to show Active Users, which are users who currently have access rights and can log in to Oracle Retail VCC. Users who have been disabled will appear in a separate user tree.

In order to access the disabled user tree

1. Select Company - Roles & Users from the menu
2. Choose Disabled Users from the Display drop-down. The Disabled Users tree appears.

For details on how to disable a user, see [Disabling a User with the Company - Roles and Users Screen](#)- Roles and Users Screen.

Roles & Users Search

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

Roles & Users Search finds specific users by name. You can find users by entering their full name, or by doing a wildcard (*) search on part of their name. For instance, if you would like to see a list of users with the first name of Jane, you would

1. Go to Company - Roles & Users
2. In the Search field, type: Jane*
3. Click the Search button or hit the Enter key.

If there is only one Jane, the tree will display her information immediately. If there is more than one Jane in the user tree, a list of all the people with the name Jane will appear.

The asterisk can be used for a wildcard search at any point in a person's name. The following combinations are all viable searches:

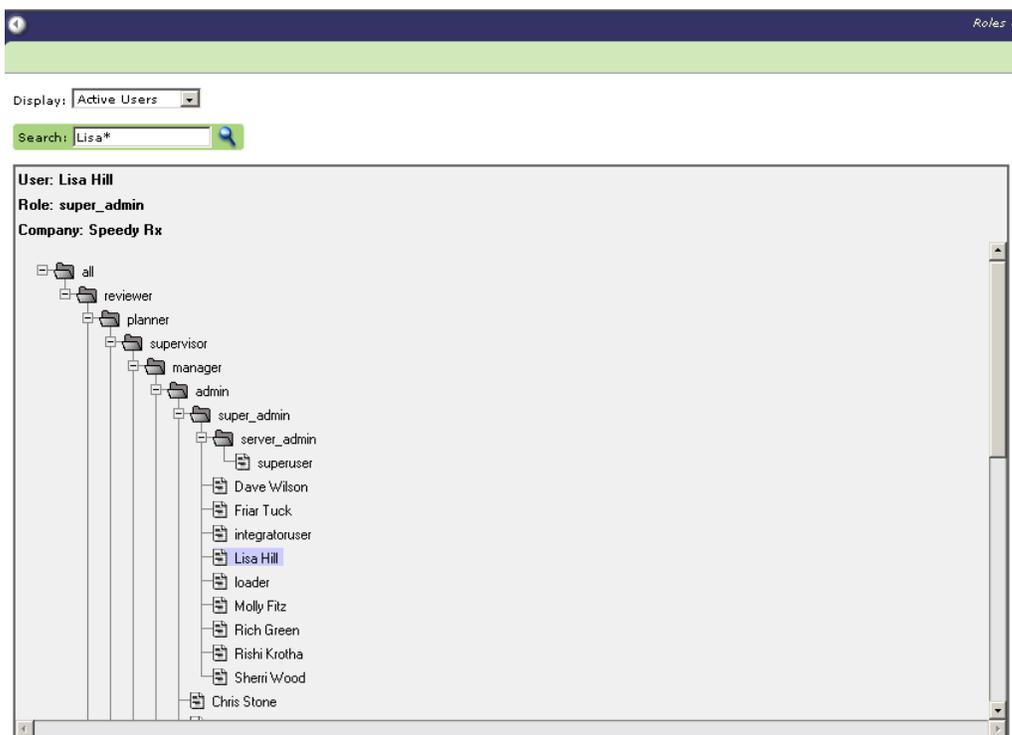
Jane Smith

Jane*

*Smith

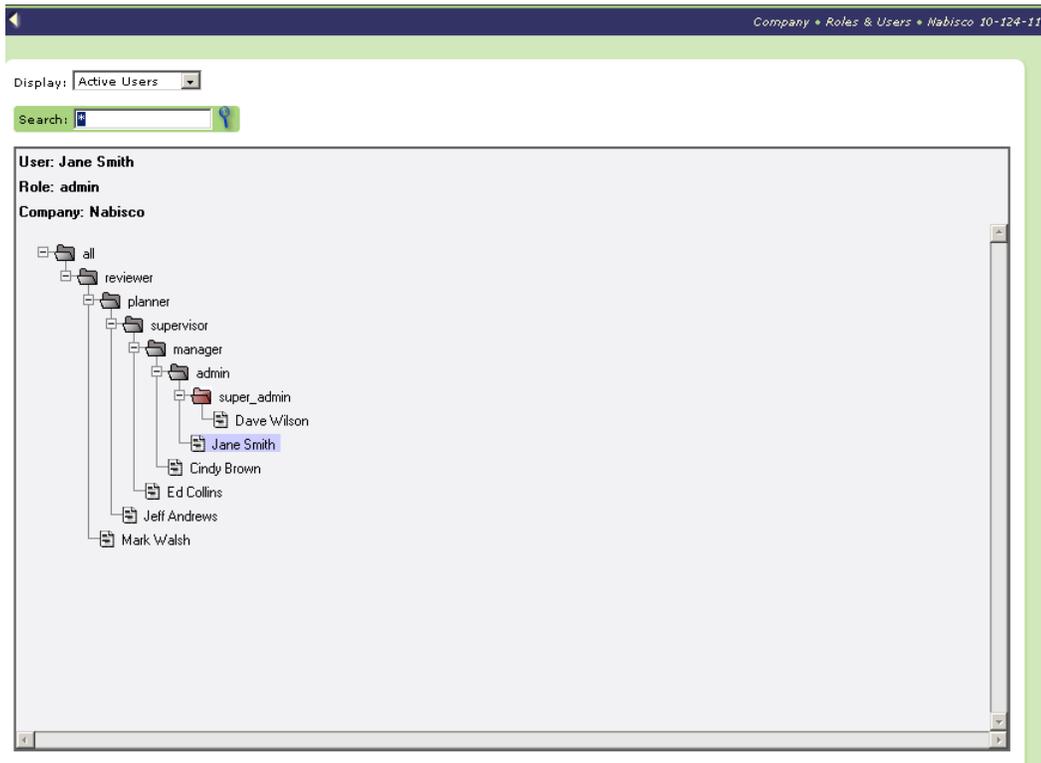
Smi

Figure 22–3 Multiple search results are returned on a user search, and a list is then presented with all the users listed who fit the search criteria



4. Search results will be displayed in a list format, if there are multiple results found. Select the name from the list by clicking on it, and a new tree view with the user's name highlighted in the tree hierarchy will appear. Their Name, Role, and Company displayed above the tree. If there only one user fits the search criteria, VCC will go directly to the tree view with the user name highlighted.

Figure 22–4 If there is only one search result match, the user tree will appear with the user's name highlighted.



Creating a New User for a Company with the Company - Roles and Users Screen

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

Once a new user is created, you must set the access rights for the user. Without access rights, the user is not able to log in since no access is the default for any newly created user. For details on setting the access rights for a new user, see [Setting or Editing User Hierarchy Access Rights with the Company - Roles and Users Screen](#)- Roles and Users Screen.

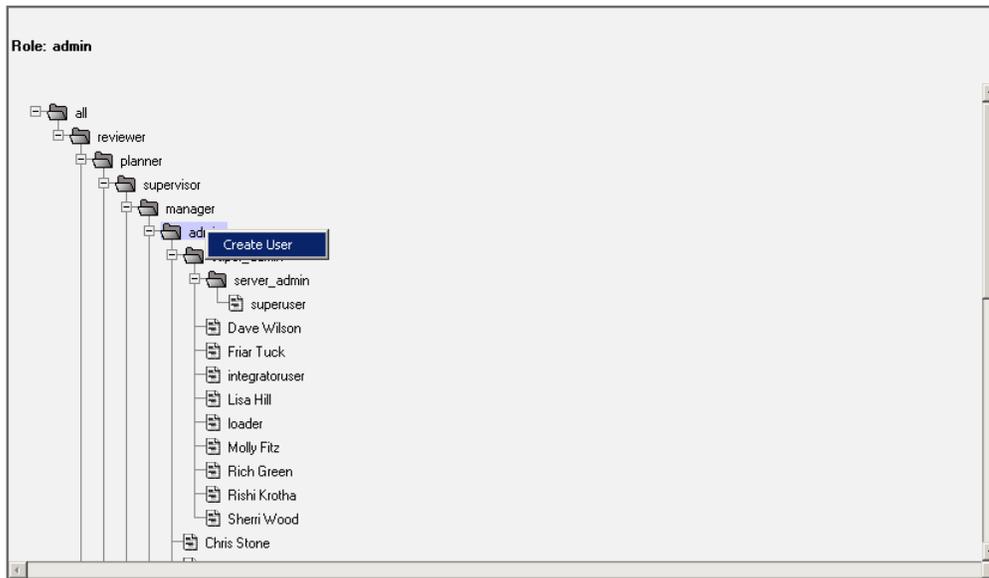
To create users for a company, superusers and serveradmins must have created superadmin and admin user.

Note: Whenever a new user is created, or the Name of an existing user is changed, a 40-50 second wait may be necessary prior to logging in as that user. Be advised that VCC may also require the new user to log in through a new browser session.

To create a new user in a specific role

1. Click **Company -Roles & Users** from the Oracle Retail VCC menu.

Figure 22–5 Oracle Retail VCC Menu



2. Pick a company from the Company Chooser, if necessary.
3. In the **User Name** field, enter the user name.
4. In the **Password** field, enter the password and enter the password again to confirm in the **Confirm Password** field.
5. Click **Create**. The **Edit Roles/Users** screen appears.

Once you create the user, you are directed to the **Edit Hierarchy Access** screen where you must assign access rights for the user. If you do not assign access rights, the user is not able to view any data.

Copying a User

You can create a new user based on an existing users profile and access rights by copying the existing user. Copying a user copies the following attributes:

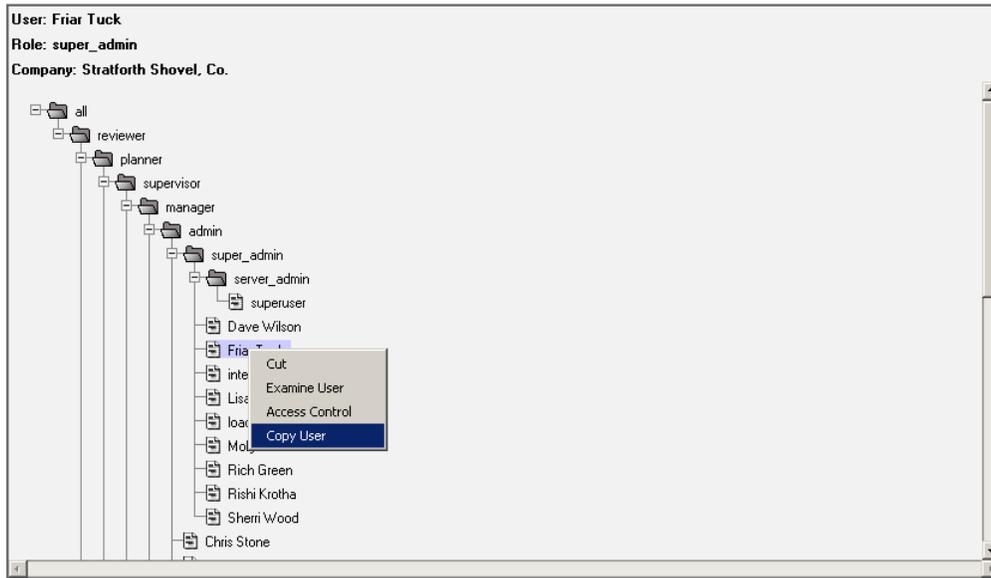
- Role
- Hierarchy Access
- Stream Access
- Preferences
- Groups
- Overlays

It does not copy the display modes of the user.

To create a new user by copying an existing user

1. Click **Company -Roles & Users** from the Oracle Retail VCC menu.
2. Highlight the user you want to copy and right-click on the user.

Figure 22–6 Oracle Retail VCC Menu - Copy User



3. Select **Copy User** from the pop-up menu. The **Copy User** screen appears.

Figure 22–7 Copy User Screen

Copy User	
Role:	super_admin
* User Name:	<input type="text"/>
* Password:	<input type="password"/>
* Confirm Password:	<input type="password"/>
Copy From:	Friar Tuck

4. In the **User Name** and **Password** fields, enter the user name and password for the new user. Confirm the password by entering it again in the Confirm Password field.
5. Click **Create**.

Setting or Editing User Hierarchy Access Rights with the Company - Roles and Users Screen

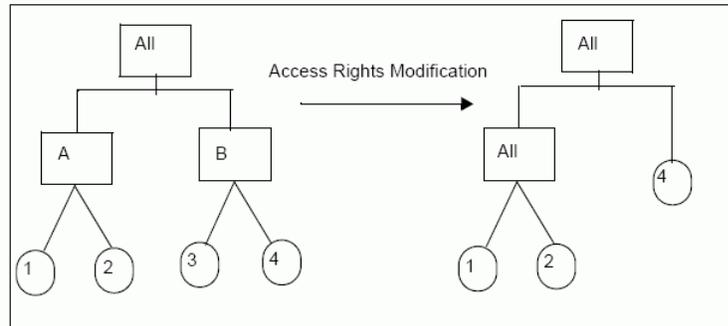
Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

Oracle Retail VCC allows you to grant a user access to any category or leaf-level item in a location hierarchy, partner hierarchy, or product hierarchy. You cannot, however, grant a user access to the company root folder for any hierarchy. If you want to do this, when creating the company, you must create a **dummy** root folder and then create the real root folder (**All Products**, for example) below it so you can grant users access to the real root folder.

For example, if you want to set or change a users access rights to a subset of partner companies, you can do so. If a user's access right had previously encompassed all

partner companies as shown in the figure below, you can select a subset, for example only company 4, the user's access tree would resemble the figure below.

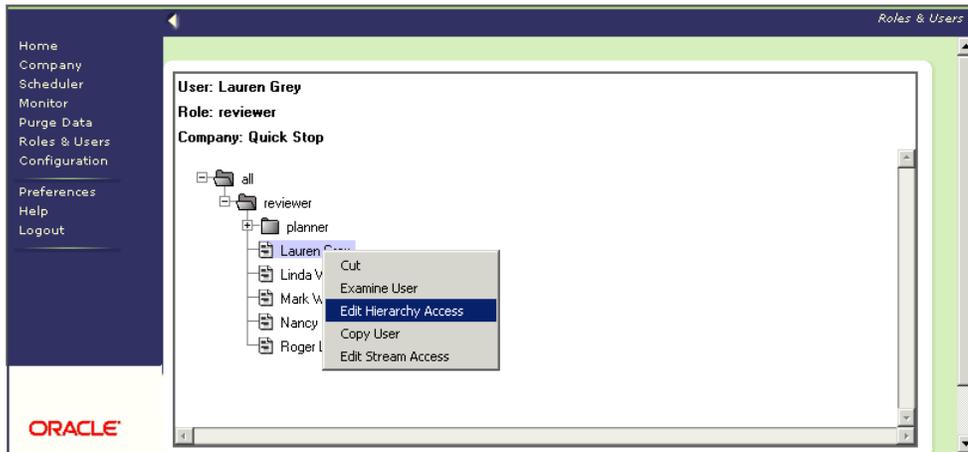
Figure 22–8 User's Access Tree



To create access rights for a user

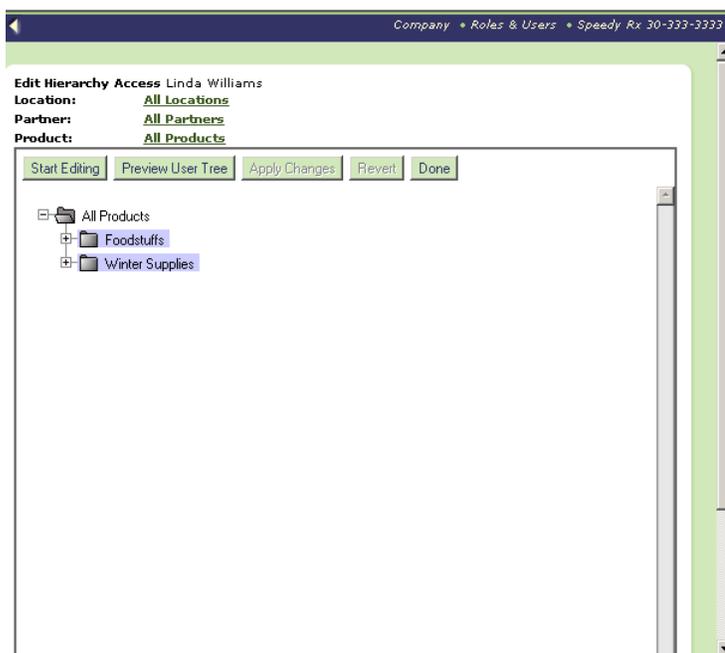
1. Select **Company - Roles & Users** from the Oracle Retail VCC menu.
2. Highlight the user to whom you want to grant access rights and right-click. In the screen below, the user **test** is highlighted.

Figure 22–9 Company - Roles & Users Screen - User Test Highlighted



3. Select **Edit Access Rights** from the pop-up menu. The **Edit Hierarchy Access** screen for the selected user appears.

Figure 22–10 Edit Hierarchy Access Screen



4. Click the **Start Editing** button to begin editing. The green-highlighted **Stop Editing** button appears.
5. Click **All Locations**, **All Partners**, or **All Products** to assign access to the desired category or folders. Any access rights that the user currently has are highlighted (in purple).
6. Click a location, partner, or product to highlight it and grant access, or click a highlighted location, partner, or product to unassign access. For example, to assign the user access rights to the **Northeast** location and all companies in the **Northeast** category, highlight **Northeast**.
7. Click **Apply Changes** to commit the changes you have selected. Click **Revert** to return to the user's current access rights. Click **Preview User Tree** to see the user's access rights.
8. Click **Stop Editing**.
9. Click **Done**.

Access Control

Assigning Users Data Stream Access

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

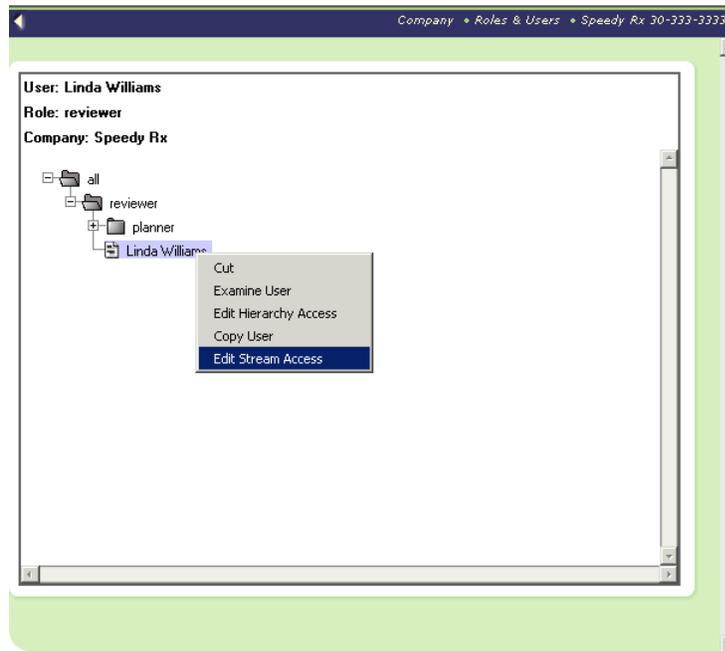
If you do not assign a user to any data streams, the user will have very limited access to VCC features.

To assign a user access to selected data streams for a company:

1. Select **Company - Roles & Users** from the VCC menu.

2. Highlight the user to whom you want to grant access rights and right-click. Select **Edit Stream Access**.

Figure 22–11 Oracle Retail VCC Menu - Edit Stream Access Option



3. The **Edit Stream Access** screen appears. From the Available Streams list box, select the streams you want to assign to the user and add them to either the **Full Access** list or the **Read-Only** list.
4. Click **Save**.

Assigning Modules to the Users

Examining a User with the Company - Roles and Users Screen

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

Examining a user allows you to view and update the user's e-mail address, login status, exception notification settings, and URL and to change a user's password. To examine a user

1. Select **Company - Roles & Users** from the Administrator main page.
2. Select a user and right-click on the highlighted user.
3. Click **Examine**. The user's **Profile** screen appears.

Figure 22–12 User's Profile Screen

The screenshot shows the 'Examine User' screen in the Oracle Roles & Users interface. The left sidebar contains navigation options: Home, Company, Scheduler, Monitor, Purge Data, Roles & Users, Configuration, Preferences, Help, and Logout. The main content area displays the following fields:

User Name:	Lauren Grey
Company Name:	Quick Stop
Login Allowed:	<input checked="" type="checkbox"/>
New Password:	<input type="text"/>
Confirm Password:	<input type="text"/>
Language:	American English

At the bottom of the form are two buttons: 'Update User' and 'Done'.

4. Click **Done** when you are finished to return to the **Edit Roles/Users** screen.

Disabling a User with the Company - Roles and Users Screen

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

To disable a user

1. Select **Company - Roles & Users** from the VCC menu.
2. Highlight the user you want to disable and right-click on the user. Click **Examine**. The user's **Profile** screen appears.

Figure 22–13 User's Profile Screen

This screenshot is identical to Figure 22-12, showing the 'Examine User' screen for user 'Lauren Grey'. The 'Login Allowed' checkbox is checked.

3. Click the check box next to **Login Allowed** to deselect it.
4. Click **Update User**.
5. Click **Done**.

The user is moved to the Disabled Users tree, and is not able to log in.

Moving a User to a New Role with the Company - Roles and Users Screen

To move a user to a new role, you must cut the user and paste the user under the new role.

Note that a user cannot move him/herself or another user at his own level to a new role.

Changing a User Password with the Company - Roles and Users Screen

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

As a company administrator, you can change any user password for your company. Users always have access to change their own passwords.

To change the password for a user

1. Select **Company - Roles and Users** from the VCC menu
2. Select a user and right-click on the highlighted user
3. Click **Examine**. The **Examine User** screen appears.

Figure 22–14 Examine User Screen

The screenshot shows the 'Examine User' interface. On the left is a navigation menu with options: Home, Company, Scheduler, Monitor, Purge Data, Roles & Users (highlighted), Configuration, Preferences, Help, and Logout. The main content area is titled 'Examine User' and contains the following fields:

- User Name: Lauren Grey
- Company Name: Quick Stop
- Login Allowed:
- New Password: [Empty text box]
- Confirm Password: [Empty text box]
- Language: American English (dropdown menu)

At the bottom of the form are two buttons: 'Update User' and 'Done'. The Oracle logo is visible in the bottom left corner of the application window.

4. In the **New Password** field, enter the new password.

Note: Quotation marks and apostrophes are valid alphanumeric characters for all password fields.

5. Reenter the password in the **Confirm Password** field.
6. Click **Update User**.
7. Click **Done**.

To change your own password

1. Select Preferences - Password from the VCC menu. The Change Password screen appears.

Figure 22–15 Change Password Screen

The screenshot displays the 'Examine User' screen within the Oracle Roles & Users interface. The left sidebar contains navigation options: Home, Company, Scheduler, Monitor, Purge Data, Roles & Users (highlighted), Configuration, Preferences, Help, and Logout. The main content area shows the following fields:

User Name:	Lauren
Company Name:	Quick Stop
Login Allowed:	<input checked="" type="checkbox"/>
New Password:	<input type="password"/>
Confirm Password:	<input type="password"/>
Language:	American English

At the bottom of the form, there are two buttons: 'Update User' and 'Done'. The Oracle logo is visible in the bottom left corner of the interface.

2. Enter your password in the Password field.
3. Enter your new password in the **New Password** field. Confirm it by reentering it in the **Confirm Password** field.

Managing the Monitor

This chapter contains the following topics:

- [About the Oracle Retail VCC Monitor](#)
- [Monitoring Oracle Retail VCC Jobs](#).
- [Monitoring Usage Statistics](#).
- [Sending Usage Statistics E-mail Notification](#).
- [Monitoring Current Connections](#)
- [Monitoring Server Locks](#)

About the Oracle Retail VCC Monitor

The Oracle Retail VCC Monitor screens include

- Jobs Monitor – view, filter, sort, or delete the current and completed list of job actions processed through the VCC user interface, Scheduler, and Integrator.
- Usage Monitor – view and evaluate the current collaboration usage statistics for the companies in the hub.
- Current Connections Monitor – observe the activity of users currently logged into Oracle Retail VCC.
- Server Locks Monitor – view and/or reset the currently active global locks or company locks.

Each is described below.

Monitoring Oracle Retail VCC Jobs

Access To This Feature: All

A tab to this screen is available to all users. A read-only view of the Oracle Retail VCC jobs for the user's company will be displayed. Additional functionality in this screen is available to superusers, serveradmins, and superadmins: a superadmin can delete his company's jobs from the list; a superuser/serveradmin can delete jobs for any company in the collaboration in addition to server-wide jobs.

There are three categories of Oracle Retail VCC jobs reported in the Jobs Monitor:

- Integrator loader jobs
- Scheduler event processing jobs
- User-generated jobs

For a complete list of jobs, refer to Appendix **VCC Locks and Jobs**

To monitor VCC jobs

1. Log in as a superuser or serveradmin.
2. Click **Monitor** from the VCC menu.
3. Click the **Jobs** tab. The **Jobs** pane appears, which contains a list of all jobs currently in process or completed. The Jobs List contains the following:
 - **User Name:** Each User Job will display the User Name of the actual user who generated the job. The Loader and Scheduler job use, respectively, **integratoruser**, and **superuser**.
 - **Company:** Name of individual company affected by job, or **All** companies.
 - **Job ID:** The Job ID is automatically generated in sequence by the VCC Server. Each Integrator Job will have a link to a Details page on its Job ID. All Job IDs with a Job Name of Process Leaf Exceptions, Process Aggregate Exceptions or Recalc Aggregates, will contain links while the status is Active. Clicking on the Job ID link will take you to a view of the job's current progress.
 - **Job Name:** Expected Job Names.
 - **Start Time/End Time:** To help differentiate between similarly named Jobs and to establish when results from completed jobs may be expected.
 - **Status:** For all Jobs, the following Statuses could be displayed: Active; Waiting on Lock; Could not obtain lock; Aborted. For Scheduler and User jobs, the completion status is simply **Completed**. For Integrator jobs, completion status could be one of the following: **Completed with no rejects and no errors**; **Completed with rejects and no errors**; **Completed with no rejects and errors**; **Completed with rejects and errors**.

Note: If a job is aborted before completion, its status may continue to be displayed as **Active** until the server is restarted.

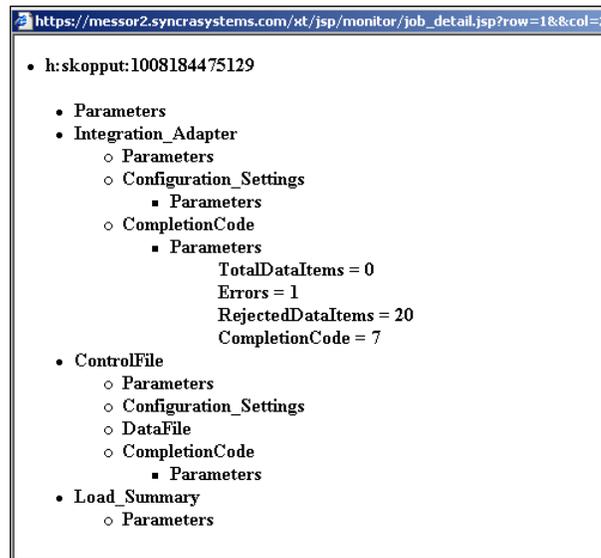
4. Optionally, you can filter the job list by User Name, Company, Job ID, Job Name, Start Date, End Date, or Status. Simply select a filter criteria from the drop-down list and enter the required information for the filter criteria selected. Click the **Apply Changes** icon to see the filtered job list.

Figure 23–1 Jobs Pane

	User Name	Company	Job ID	Job Name	Start Time	End Time	
<input type="checkbox"/>	PG	296749	Modify Product Hierarchy	04/06/06 01:29:56	04/06/06 01:32:41	Completed	
<input type="checkbox"/>	integratoruser	All Companies	232934	Int - Load Master Data	02/20/06 22:52:29	02/20/06 22:52:34	Completed with no reje errors
<input type="checkbox"/>	integratoruser	All Companies	232772	Int - Load Master Data	02/14/06 23:21:22	02/14/06 23:21:34	Completed with no reje errors
<input type="checkbox"/>	integratoruser	All Companies	232755	Int - Load Master Data	02/14/06 04:23:55	02/14/06 04:24:02	Completed with no reje errors
<input type="checkbox"/>	integratoruser	All Companies	232753	Int - Load Master Data	02/14/06 02:34:18	02/14/06 02:34:26	Completed with no reje errors
<input type="checkbox"/>	integratoruser	All Companies	231987	Int - Load Master Data	02/11/06 03:18:25	02/11/06 03:18:29	Completed with no reje errors
<input type="checkbox"/>	integratoruser	All Companies	231978	Int - Load Master Data	02/11/06 03:11:08	02/11/06 03:11:15	Completed with no reje errors
<input type="checkbox"/>	integratoruser	All Companies	231976	Int - Load Master Data	02/11/06 03:09:55	02/11/06 03:09:56	Completed with no reje errors
<input type="checkbox"/>	integratoruser	All Companies	222822	Int - Load Master Data	02/03/06 01:15:10	02/03/06 01:15:14	Completed with reje errors
<input type="checkbox"/>	integratoruser	All Companies	222819	Int - Load Master Data	02/03/06 01:13:56	02/03/06 01:13:58	Completed with no reje errors
<input type="checkbox"/>				02/03/06	02/03/06	Completed with no reje errors	

5. Set job list items for deletion in any of three ways:
 - Click in a check box - see a checkmark appear; see the Delete button appear.
 - Click the X-Mark Icon - see a checkmark appear in all of the check boxes on the page. Click the **Delete** button to remove the checked items.
 - Click the **Mark Entries Before** check box to indicate you are setting a date before which you want to delete all items. You can enter the date directly into the date box (be sure to use the defined date format), or you can click the Calendar icon and select a date from it. Click the **Apply Changes** icon to add the checkmark to the targeted items; click the **Delete** button to remove the checked items.
 - Superusers and serveradmins can delete any job; superadmins can delete jobs for their own companies. Deleted jobs are removed from the user interface view only. To permanently remove jobs from the VCC database, run the Scheduler task **Purge Jobs Monitor**.
6. Integrator jobs and some Scheduler jobs contain additional information. Click the active link under the **Job ID** column. A separate simple browser window opens displaying the first link to the Job details. Click on the first bullet to expand. Click on the sub-bullets to drill to desired information. Be precise when clicking a bullet to expand or contract the XML file. Clicking near the bullet could cause the opposite of the intended action.

Figure 23–2 Job Details Window



7. Click the **Refresh** icon to see End Time and Status Updates.
8. Click on the **Printer -Friendly** Icon to obtain a **Printer-Friendly View** of this screen, or click the Export Data icon to extract the job list as an HTML or CSV file.

Monitoring Usage Statistics

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin, Manager

A tab to this screen is only available to superusers, serveradmins, superadmins, admins and managers. It will not display at all when users in other roles access the Monitor.

For each local company in a collaboration, usage statistics display the number of

- locations
- partners
- products
- aggregates
- single collab items
- shared collab items
- total collab units
- streams
- substreams
- active users
- inactive users
- system users

Additional details are available through links for aggregates and collaboration items. Usage information is initially generated and subsequently updated by executing a

Scheduler event for the Report Usage task. Also, each time this event executes, an e-mail can be sent.

To view company usage statistics

1. Generate the initial Usage Report by using the Scheduler to execute an event for the Report Usage task.

Figure 23–3 Report Usage Task Screen

Company Name	Locations	Partners	Products	Aggregates	Single Collab Items	Shared Collab Items	Total Collab Units	Streams	Substreams	Active Users
Nabisco					1	7	0	0	0	11

2. Click **Monitor** from the VCC menu. The Monitor pane appears.
3. Click the **Usage** tab to display the usage statistics for the companies to which you have access in your database.
4. The Aggregates column and the Shared Collaboration Items column contain hyperlinks that allow you to view the aggregates and the shared collaboration items, respectively.
5. Click the **Refresh** icon to see any changes that have been made since you entered this screen.
6. Click on the **Printer** Icon to obtain a **Printer-Friendly View** of this screen.
7. Click on the **Export** Icon to export the information displayed on the screen. Choose from HTML and CVS file format options.
8. To send an e-mail notification each time the Report Usage event is executed in the Scheduler, see [Sending Usage Statistics E-mail Notification](#).

Superusers and serveradmins have two additional informational items on the screen from the VCC license: maximum number of users, and the maximum number of collaboration units. These numbers are set in the license generated for the hub.

Sending Usage Statistics E-mail Notification

Access To This Feature: Superuser, ServerAdmin

Oracle Retail VCC allows you to send an e-mail message to a user or group of users each time VCC recalculates usage statistics. To send an e-mail in a foreign language, ensure the language is loaded for VCC.

To send an e-mail notification

1. Click **Configuration** in the VCC menu.
2. Click the **General** tab. The General screen appears.

Figure 23-4 General Screen Under Configuration Section

The screenshot shows the 'Configuration' window with the 'General' tab selected. The 'Billing' section at the bottom is highlighted with a red border. It contains the following fields and options:

- Send an E-mail every time the Usage Report is run.
- Language: American English (dropdown)
- E-mail List: mailid@mail.com (text input with a dropdown arrow)
- Use ; to separate consecutive E-mail addresses.

A 'Save' button is located below the Billing section.

3. In the **Billing** section at the bottom of the screen, check the box labeled **Send e-mail every time the Usage Report is run** to send an e-mail each time usage statistics are calculated. For a usage report to be calculated, you must schedule the Report Usage task to run at specific intervals.
4. Select a Language for e-mail recipients from the Language drop-down.
5. In the E-Mail list box, enter the e-mail address or addresses (separated by a semicolon) to the users to be notified.
6. Click **Save**.

Monitoring Current Connections

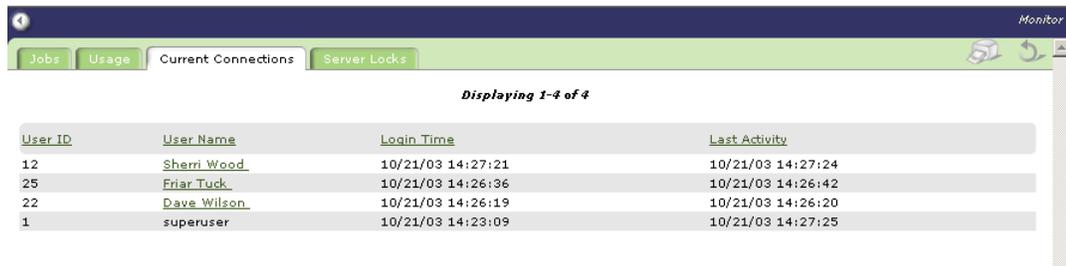
Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

Administrators can monitor the users who are currently logged in to VCC, how long they have been logged in and the time of their last activity.

To monitor user connection time

1. Click **Monitor** from the VCC menu.
2. Click the **Current Connections** tab. The Current Connections pane appears showing the users who are logged in, the date and time they logged in, and the time of the user's last activity.
3. To view details on a specific user, click the user's name in the User Name column.

Figure 23–5 Current Connections Pane



User ID	User Name	Login Time	Last Activity
12	Sheri Wood	10/21/03 14:27:21	10/21/03 14:27:24
25	Friar Tuck	10/21/03 14:26:36	10/21/03 14:26:42
22	Dave Wilson	10/21/03 14:26:19	10/21/03 14:26:20
1	superuser	10/21/03 14:23:09	10/21/03 14:27:25

4. Click the **Refresh** icon to see any changes that have been made since you entered this screen.
5. Click on the **Printer** Icon to obtain a **Printer-Friendly View** of this screen.

Monitoring Server Locks

Access To This Feature: Superuser, ServerAdmin, SuperAdmin

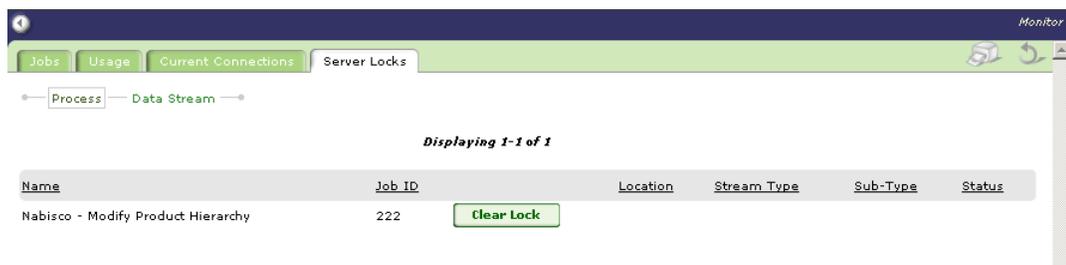
Whenever a task or job requires exclusive access, VCC acquires a lock for it. This lock may block other VCC activity.

For a complete list of server locks, their descriptions, and behavior, refer to [VCC Locks and Jobs](#).

To monitor server locks

1. Select Monitor from the VCC menu.
2. Click the **Server Locks** tab. The Server Locks - Process screen appears.

Figure 23–6 Server Locks - Process Screen



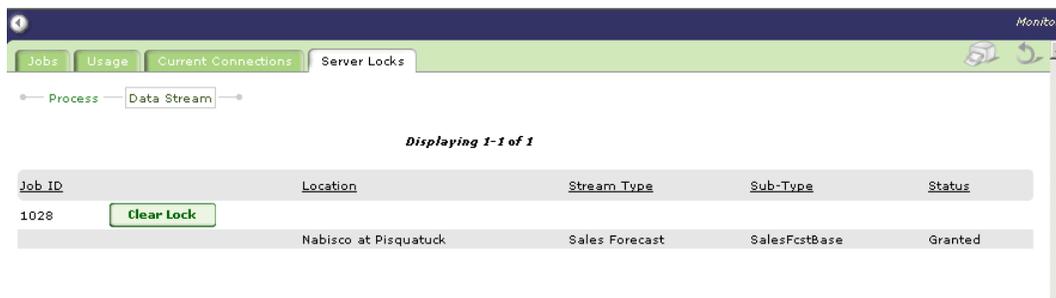
Name	Job ID	Location	Stream Type	Sub-Type	Status
Nabisco - Modify Product Hierarchy	222				

3. Click on the **Refresh** icon. If a job has been completed, the lock will no longer display.
4. If a server lock is retained inadvertently or occurs due to a contention for system resources, you can clear the lock by clicking the Clear Lock button.

Note: Do not clear a lock until you verify that the locked process has terminated by viewing the appropriate log file. Clearing a lock does not halt the activity which generated the lock. Though the lock is no longer listed, it will continue blocking until processing has completed.

You can view, clear, and monitor Data Stream locks in the same way you do Process Server Locks. The Data Stream subtab displays data stream server locks, as seen below.

Figure 23–7 Data Stream Server Locks Pane



Click on the **Printer** Icon to obtain a **Printer-Friendly View** of the screen.

Managing the Scheduler

This chapter includes the following topics:

- [About the Scheduler](#)
- [Working with the Scheduler Interface](#)
- [Working with Scheduler Events](#)
- [Adding an Event](#)
- [Deleting events](#)
- [Working with Tasks](#)
- [Adding a Task](#)
- [Editing a Task](#)
- [Deleting a Task](#)

About the Scheduler

Oracle Retail VCC provides the Scheduler user interface to allow you to instruct the Scheduler Server to execute any predefined Oracle Retail VCC tasks and any Windows or Unix command you specify. These commands are called **Tasks**.

The Scheduler Server processes these commands at a designated execution time. Each task scheduled becomes an **Event**.

Only a superuser, serveradmin, and superadmin have access to the scheduler. A superuser or Server Admin has the option to create an Event for either one company or all companies. A superadmin-created Event will affect only superadmin companies.

You have the option to create/edit new Tasks/commands that the Scheduler will retain for ongoing usage until deleted. Additionally, to facilitate basic processing needs, the Scheduler also includes a number of selectable preloaded Task commands. These preloaded tasks will work in a Windows or Unix environment.

Tasks/commands initiate the execution of defined Processes. You have the option to specify an **Event** to execute a Task at one particular time or at designated time intervals.

The Scheduler log provides a view of the processed Events. This log shows the times the Processes were executed and if any problems occurred in scheduling or processing the Event. The Scheduler log is stored in the **bin** directory of your application server installation.

Some of the tasks require more system processing time to process than others. These tasks acquire system locks to prevent other processes from interfering until the task

process completes. The superuser, serveradmin, and superadmin can see active locks in the Server Locks Monitor (see [Monitoring Server Locks](#)).

The Oracle Retail VCC Scheduler Server reports the ID and processing information for all the preloaded processes to the Jobs Monitor that is available for any user by selecting **Monitor** on the Oracle Retail VCC menu.

Working with the Scheduler Interface

The Scheduler allows you to schedule the execution of VCC predefined tasks. A scheduled task is called an **event**. The Scheduler also allows you to create and schedule any other valid system command.

Note: The Scheduler Server must be running before access is allowed from the user interface.

To access the Scheduler, click **Scheduler** from the VCC menu. If the Scheduler is not running or if there is a problem with the configurations, a message will inform you of this. These issues must be resolved before the **Scheduler** screen will open.

The interface provides these utilities:

- Pause and Resume the Scheduler processing.
- Work with Tasks and Events.

Be aware of all event scheduling and task/command processing recommendations when working with the preloaded tasks.

The Scheduler List screens contain combinations of icons that allow you to

- Refresh the screen to view updates.
- Access a Printer-Friendly view of the current list.
- Eport data as an an HTML file or as a CSV file.

For a detailed explanation of icons and their uses, see [The Oracle Retail VCC User Interface](#).

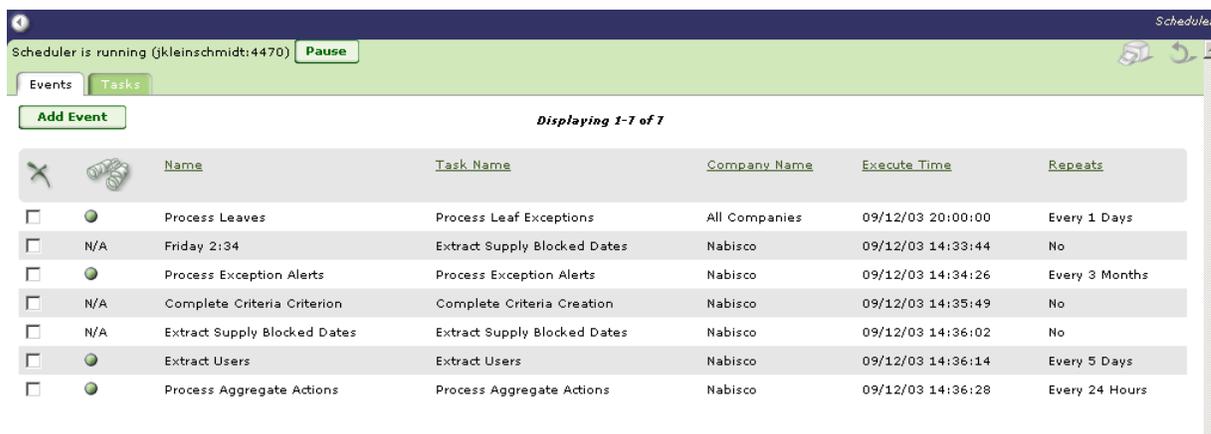
Working with Scheduler Events

Events List

Events allow you to schedule the execution of VCC predefined tasks or other tasks (system commands) that you have created.

Clicking the **Events** tab opens the **Events** window. If there are existing Events they will be listed.

Figure 24–1 Events Window



Scheduler is running (jkleinschmidt:4470) **Pause**

Events **Tasks**

Add Event *Displaying 1-7 of 7*

	Name	Task Name	Company Name	Execute Time	Repeats
<input type="checkbox"/>	Process Leaves	Process Leaf Exceptions	All Companies	09/12/03 20:00:00	Every 1 Days
<input type="checkbox"/>	N/A Friday 2:34	Extract Supply Blocked Dates	Nabisco	09/12/03 14:33:44	No
<input type="checkbox"/>	Process Exception Alerts	Process Exception Alerts	Nabisco	09/12/03 14:34:26	Every 3 Months
<input type="checkbox"/>	N/A Complete Criteria Criterion	Complete Criteria Creation	Nabisco	09/12/03 14:35:49	No
<input type="checkbox"/>	N/A Extract Supply Blocked Dates	Extract Supply Blocked Dates	Nabisco	09/12/03 14:36:02	No
<input type="checkbox"/>	Extract Users	Extract Users	Nabisco	09/12/03 14:36:14	Every 5 Days
<input type="checkbox"/>	Process Aggregate Actions	Process Aggregate Actions	Nabisco	09/12/03 14:36:28	Every 24 Hours

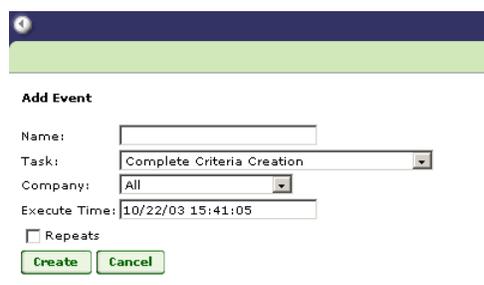
Adding an Event

Access To This Feature: Superuser, ServerAdmin, SuperAdmin

To add an event

1. Click the **Add Event** button. The **Add Event** screen appears.

Figure 24–2 Add Event Screen



Add Event

Name:

Task:

Company:

Execute Time:

Repeats

Create **Cancel**

2. In the **Name** field, enter the name for your Event.
3. In the **Task** field, select a Process to run from the drop-down menu.
4. If you are a superuser or serveradmin, select a specific company from the Company drop-down, or select **All** to schedule an event for all companies.

Figure 24-3 Add Event Screen with selected company name

- The **Execute Time** appears as a date/time combination. The date field initially displays the current date in the default date format dd/mm/yy. You can revise the date format by selecting from options available in **Preferences - General**. The **Time** field always displays the time in military format HH:mm:ss and is not affected by time format changes made in **Preferences - General**.

Note: It is recommended that all installation and user machines be synchronized to avoid apparent discrepancies in reading processing times

In the **Execute Time** field, you can leave the date/time as displayed to schedule the processing to run or begin immediately or you can edit to schedule the processing to begin later. Be sure to revise the date using the current Date Format defined in Preferences - General. Enter the time in the military format: HH:mm:ss.

The **Execute Time** field initially displays the same time as the selected time zone's local time.

- Leaving the **Repeats** box unchecked means that your Event will only execute one time. It will be listed on the **Events** screen only until its processing has completed.

Clicking this check box brings up a field to let you schedule the Event to repeat at designated intervals.

A Repeating Event will remain in the **Events** screen until you delete it.

Once you select an interval type, enter the name for your Event from the Task menu and define how often to run it.

Points to remember

- Allow enough time for each event to process before the next event begins.
- Schedule at times when processing loads are light.
- Click the **Create** button to save the Event. The **Events** screen opens displaying the new Event. The Event created can be edited and deleted.
- Click the **Cancel** button to exit the **Add Event** screen without saving.
- When scheduling events, be aware of the **Repeat Frequency** configured for processing times in Reports, Extracts, Disagg. Setup, Supply Batch, Demand Batch, and Safety Stock screens.

- Processing on a particular feature may or may not occur when a Scheduler Event is executed. Those configuring **Repeat Frequency** for a feature should be aware of scheduled repeating Events affecting the feature.

Deleting events

Access To This Feature: Superuser, ServerAdmin, Superadmin

To delete an Event

1. Click **Scheduler** from the VCC menu.
2. Click the **Events** tab to display all scheduled events.
3. Click the **Delete** check box next to an Event.
4. Click the **Delete Selected** button to delete the checked Event.

Working with Tasks

The VCC Scheduler is preloaded with the tasks (commands) required to facilitate basic VCC processing needs. Ordinarily, you do not have to add new tasks for any VCC processing requirements. You can, however, add any other system task (command) and schedule it for processing using the scheduler.

Note: Superadmin will see list of Tasks associated with company-assigned Modules; Superuser and ServerAdmin will see a list of Tasks associated with Modules licensed to the Hub.

See [Scheduler Task Descriptions](#). lists a brief description of each preloaded Task.

Table 24–1 Scheduler Task Descriptions

Scheduler Tasks	Descriptions
1. Complete Exception Criteria Creation	- Creates a new aggregate stream, or links to an existing aggregate stream. - Changes the aggregate exception criteria 'Status' from Pending to Active .
2. Extract Supply Blocked Dates	- Extracts Supply Blocked Dates from the Oracle Retail VCC Database. - Extracts data to: Syncra\Integrator\Exports\Extraction (Scheduler machine).
3. Extract UOMs	- Extracts the current Unit-of-Measure (UOM) options from the Oracle Retail VCC database. - Extracts data to: Syncra\Integrator\Exports\Extraction (Scheduler machine). - (Or, to directory path configured in the Oracle Retail VCC Integrator UI).
4. Extract Users	- Extracts the current Users from the Oracle Retail VCC database. - Extracts data to: Syncra\Integrator\Exports\Extraction (Scheduler machine). - (Or, to directory path configured in the Oracle Retail VCC Integrator UI).

Table 24–1 (Cont.) Scheduler Task Descriptions

Scheduler Tasks	Descriptions
5. Process Aggregate Actions	- Processes In-Process and Resolution actions for all leaf and aggregate exceptions.
6. Process Aggregate Exceptions	<ul style="list-style-type: none"> - Identifies aggregate data revisions. - Identifies and re-synchs aggregate criteria with any folders marked 'dirty' by hierarchy changes. - Obsoletes any exceptions triggered by items no longer included in folder marked 'dirty' by hierarchy changes. - Identifies any exceptions resulting from the aggregate stream revisions. - Identifies any group exceptions. - Processes Initial actions for all new Aggregate exceptions triggered.
7. Process Exception Alerts	<ul style="list-style-type: none"> - Sends e-mails to supplied e-mail addresses in Exceptions' Send Alert Requests list. - Run this task after processing exceptions through these tasks: · Process Leaf Exceptions · Process Aggregate Exceptions · Process Leaf Actions; Process Aggregate Actions
8. Process Extract Requests	<ul style="list-style-type: none"> - When an extract request has been created in the Extract UI for any/all of the options: <ul style="list-style-type: none"> · Extracts requested data from the VCC Database. · Extracts data to: Syncra \Integrator \Exports \Retrieval (Scheduler machine). · (Or, to the 'File Path' / 'File URL' as configured in VCC Configuration-Client screen.) - If the data_retrieval.log file (generated in Syncra_Home/integrator/logs directory) contains errors like FileNotFound or NoSuchFileOrDirectory, it could mean the following: <ol style="list-style-type: none"> 1. Either the user who is processing the Extract request does not have permission to the Directroy path where the system (integrator) is trying to save the extracted file. 2. The Directory Path where the system is trying to save the extracted file does not exist.
9. Process Leaf Actions	- Processes In-Process and Resolution actions for all leaf exceptions.
10. Process Leaf Exceptions	<ul style="list-style-type: none"> - Identifies leaf stream data revisions. - Identifies and re-synchs the any folders marked 'dirty' by hierarchy changes. - Obsoletes any exceptions triggered by items no longer included in folder marked 'dirty' by hierarchy changes. - Identifies any exceptions resulting from the leaf stream revisions. - Tags any aggregates affected by the leaf stream revisions. - Identifies any group exceptions. - Processes Initial actions for all new Leaf exceptions triggered.

Table 24–1 (Cont.) Scheduler Task Descriptions

Scheduler Tasks	Descriptions
11. Purge Jobs Monitor	<ul style="list-style-type: none"> - Purges all Job Monitor items (included in purge requests for the hub) in the Purge Request screen at the time this task event is executed. - Purges these items up to the "Retain 'N' number" (initial default = 50k) specified in the edit screen for the Purge Jobs Monitor option in the Purge Data screen.
12. Purge User Activity	<ul style="list-style-type: none"> - Purges all current connections (included in purge requests) in the Purge Request screen at the time this task is executed.
13. Recalculate Aggregates	<ul style="list-style-type: none"> - Identifies leaf stream data revisions. - Identifies and recalculates aggregates created on folders that were affected by a hierarchy change. - Tags any aggregates affected by the leaf stream revisions. - Updates the tagged aggregates. Identifies any group exceptions.
14. Recalculate Disaggregation Factors	<ul style="list-style-type: none"> - Recalculates the Profile factors set in Disagg. Profiles. - Computes the proportion to distribute aggregate values among the aggregates' leaves.
15. Recalculate Metrics	<ul style="list-style-type: none"> -Recalculates all Metrics that are check marked in the Run Override column in the Metrics UI at the time this task event is executed. - Also recalculates whenever the Repeat Frequency time has been reached.
16. Report Usage	<p>Whenever this event is executed:</p> <ul style="list-style-type: none"> - Computes the current collaboration usage status and sends it to Monitor-Usage. - Sends copy of usage status to any email addresses supplied in the Configuration-Billing screen when its Send Email check box is checked.
17. Roll Criteria	<ul style="list-style-type: none"> -Roll the Start Date forward, and obsolete the exception (triggered by the first period) for criteria defined with rolling dates. -Roll Criteria defined using Rolling Period Overlays. -Roll Criteria defined using fixed Period Overlays with Rolling Dates.
18. Run And Send Reports	<ul style="list-style-type: none"> - Processes 'flagged' reports (in each format type defined) as created in the Reports UI. (See Run Reports description on this page.) - For each report where Destination = Email, Sends report (in defined formats) to respective email address supplied. - For each report where Destination = FTP, Sends report to the IPAddress/name with Username/Password. <p>(While processing reports, if java.lang.OutOfMemoryError occurs, the <code>java.runtime.params</code> parameter in the <code>ServerCommon.properties</code> file should be modified to increase the JVM size. This file is found in <code>Syncra_Home/lib</code> directory on the server machine.)</p>
19. Run Demand & Lift Factor Batch Requests	<ul style="list-style-type: none"> - Creates a Demand forecast for each Demand Request created since last time this task event was executed. - Calculates Lift Factors for each Lift Factor request created since last time this task event was executed.

Table 24–1 (Cont.) Scheduler Task Descriptions

Scheduler Tasks	Descriptions
20. Run Demand Batch Requests	- Creates a Demand forecast for each Demand Request created since last time this task event was executed.
21. Run Lift Factor Batch Requests	- Calculates Lift Factors for each Lift Factor request created since last time this task event was executed.
22. Run Reports	- Processes all reports that had been 'flagged' at the time this task event is executed. - Reports will be flagged in one of two ways: - The 'Run' schedule defined in the Report UI has been reached. - The Override Run Schedule check box for a Report has been checked in the Report-List screen.
23. Run Safety Stock Batch Requests	- Calculates Safety Stock for each Safety Stock Calc Request created since last time this task event was executed.
24. Run Supply & Safety Stock Batch Requests	- Creates a Supply Plan for each Supply Request created since last time this task event was executed. - Calculates Safety Stock for each Safety Stock Calc Request created since last time this task event was executed. - Also runs if Run Override is performed on a batch job, or if the Repeat Frequency time has been reached.
25. Run Supply Batch Requests	- Creates a Supply Plan for each Supply Request created since last time this task event was executed. - Also runs if Run Override is performed on a batch job, or if the Repeat Frequency time has been reached.
26. Send Promotion Alerts	For any email addresses/notification offsets supplied within any Promotion: - Sends email notification about Status changes to Promotion. - Sends email notification about Milestone Due Date changes to Promotion.
27. Send Reports	For each report where the Report's Destination = E-mail - Sends report (in defined formats) to respective email address supplied. - For each report where Destination = Extract - Extracts data to: Syncra\Integrator\Exports\Retrieval (Scheduler machine). - (Or, to directory path configured in the Report UI.)
28. Update Promotions	- Performs system updates to Promotion Status. - Updates Condition based on Milestone Due Dates.
29. Process Events Totals	- Process the computation of Totals for Events and Promotions.

Adding a Task

Access To This Feature: Superuser, ServerAdmin, Superadmin

You can create a new **task** for any valid Windows or Unix command. The Task/command is listed and remains available until deleted.

Note: Do not use double quotes in task fields. It can cause the Scheduler's List screen **Export Data** icon to extract a file with incorrectly formatted fields for this Task.

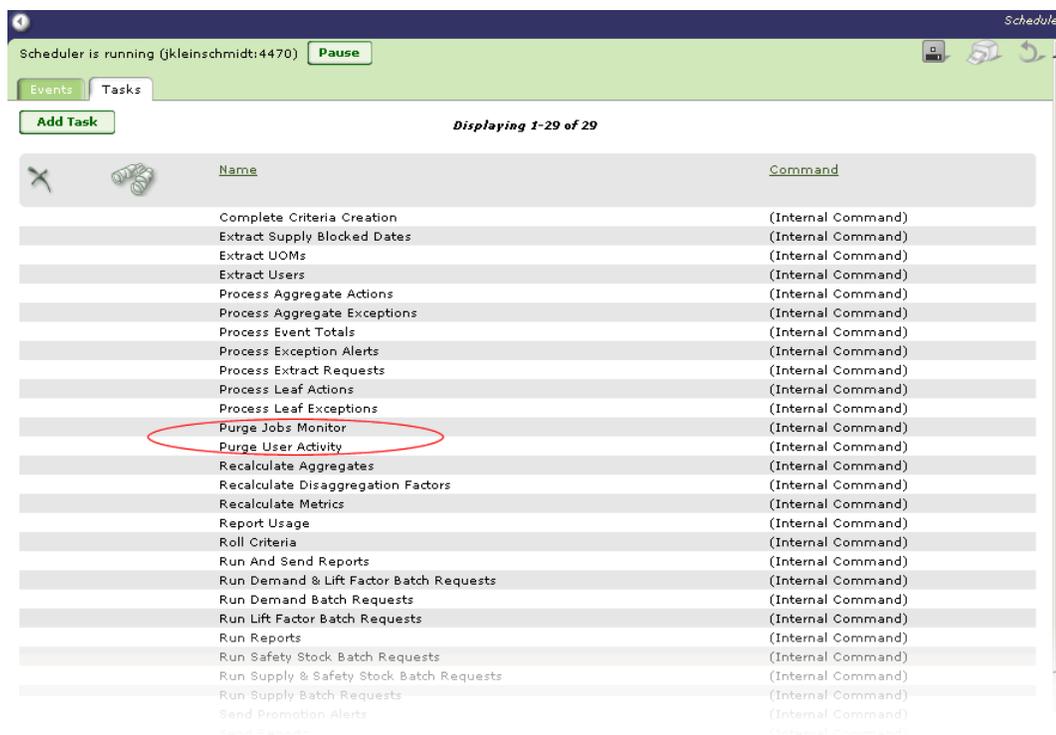
To add a task

Click **Scheduler** from the VCC menu.

1. Click the **Tasks** tab. The **Tasks** screen appears.

Note that there are two types of scheduler task that appear only to superuser and serveradmin roles. These are Purge Jobs Monitor and Purge User Activity, as seen below.

Figure 24–4 Tasks Screen



2. Click the **Add Task** to create a new task.

Figure 24–5 Add Task Screen

Add Task

Name:

Command:

3. In the Name field, enter the task name.
4. In the Command field, enter the task command.

5. The new **task** is listed. It can be selected, edited, and deleted. Click the **Cancel** button to exit this dialog without saving.

Editing a Task

Access To This Feature: Superuser, ServerAdmin, SuperAdmin

User-created Task names and commands can be modified at any time. Preloaded Tasks cannot be changed.

To edit a user-created task

1. Click the **Edit** button (colored dot) next to a task.
2. The **Edit a Task** screen opens and allows you to revise the Task name and command (if allowed).

Figure 24–6 Edit a Task Screen



3. Click **Set** to set the edit or **Cancel** to return to the **Scheduler** screen.

Deleting a Task

Access To This Feature: Superuser, ServerAdmin, SuperAdmin

A user-created **Task** is listed with a **Delete** check box next to it. User-created tasks can be deleted at any time. Preloaded tasks cannot be deleted.

To delete a user-created task

1. Click the **Delete** check box next to the user-created Task.
2. Click the **Delete Selected** button to delete the checked Task.

Managing Company Data Purges

This chapter contains the following topics:

- [About Data Purge Requests](#)
- [Creating Purge Requests](#)

About Data Purge Requests

Oracle Retail VCC allows you to create **purge requests** for a specific company that you then can display and manage in the **Purge Data** pane. A purge request specifies the data stream type you want to delete (purge) from your database and the time frame (purge date) of the data to be deleted.

There are four types of Purge Requests:

- Transaction
- Event Promotions
- Collaboration Item Comments
- Exceptions

For both Transaction and Comments purges, all data in the data stream created before the date specified is deleted when the purge request is executed. Purging Event Promotions does not delete (generated) data contained in the data stream, but purges only the (user-defined) Event Promotion itself.

The Transaction purge type is the default when you enter the Company - Purge Requests screen. Transaction purge will purge all data between the start and end dates or periods you enter in the date/period fields. It is also possible to create a transaction purge request across multiple companies by selecting from the Companies list box (superuser/serveradmin only). Multiple Stream Types can also be selected, and both Leaf and Aggregate purge types can be selected together.

The Event Promotion and Collaboration Item Comments purges allow you to select multiple companies from the select box (superuser/serveradmin), and to enter dates or periods that all related promotions and context comments will be purged between.

Once a purge request is submitted, a superuser or serveradmin can execute the actual purge. Superusers/serveradmins are allowed to purge the following data:

- Transaction
- Job Monitor
- User Activity
- Event Promotions

- Exception Purge
- Collaboration Item Comments
- Master Data

Creating Purge Requests

Access To This Feature: Superuser, ServerAdmin, SuperAdmin, Admin

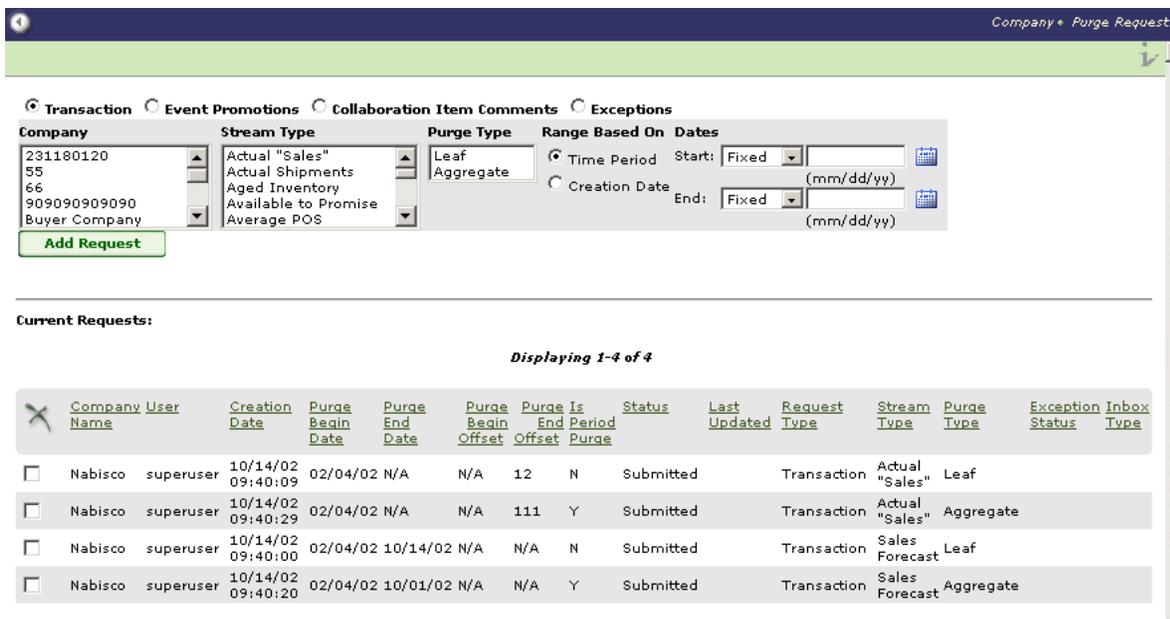
Purging data effectively deletes the transaction data for the data stream from your database. To purge transaction data, you first must create a **purge request**. A purge request specifies the data stream to be purged and the creation dates between which all data is to be purged. Once you have created the purge request, it appears in **Purge Data** screen with all other purge requests where you can start the purge process or reject the request. In addition, any master data (product, partner, or location hierarchy) you cut and paste into the recycle bin can be purged by a superuser/serveradmin. Placing it in the recycle bin effectively submits a purge request similar to a purge request for transaction data.

You can purge data between specific creation dates (static data purge), or you can create a purge request for data that is a specified number of periods old.

To create a Transaction purge request

1. Select **Company - Purge Requests** from the Oracle Retail VCC menu. The **Purge Requests** screen appears.

Figure 25–1 Purge Requests Screen



2. **Transaction** is the default purge request type selected. Other requests include: Event Promotions, Collaboration Item Comments, and Exceptions.
3. Select the company or companies to purge data from in the Company select box (superuser/serveradmin).
4. In the **Stream Type** field, select the data stream type from the multi-select box.
5. In the **Purge Type** field, select the type: **leaf**, **aggregate**, or both.

6. Select a **Range Based On** radio button. Purge request period or date ranges can begin based on either Time Period or Creation Date.
7. If you have selected a **Fixed** start or end date from the Dates/Periods drop-down, enter the dates between which you want all data purged. Dates can be entered in the **mm/dd/yy** format or by clicking the calendar icon and selecting a date (the calendar icon does not apply to rolling horizon data purges).
8. If you are creating a rolling horizon purge request, enter the number of periods in the **Dates/Periods** field.
9. Click **Add Request**. The request appears in the **Current Requests** pane below.

To create Event Promotions or Collaboration Item Comments purge requests, select the appropriate radio button and complete steps 3, 6, and 8 above.

Note: For Event Promotion Purges, a purge request created for a company will also purge events created by non-local partners for that company

To create an Exceptions purge request, complete all the steps above except for step See In the Purge Type field, select the type: **leaf**, **aggregate**, or both... In place of Purge Type, select **Local**, **Read-Only**, or **Both** from the Type drop-down.

Managing Company UOM Factors

This chapter contains the following topics:

- [About UOM Factors](#)
- [Viewing the UOM List](#)
- [Creating New UOM Factors](#)
- [Deleting UOM Factors](#)

About UOM Factors

Unit-of-measure (UOM) factors allow you to visualize the conversion of product quantities between two different UOMs. The UOM List and Create screens in Oracle Retail VCC allow you to add, edit, and delete conversion factors that will affect UOMs. Usually, the conversion factor is used to convert a product UOM such as **Base Units** into a UOM such as **Case**.

For example, a retailer sends you a forecast that uses 6 packs as the unit of measure for soda, and you, as the supplier, need to be able to view the product in 4 different types of packaging: single cans, 6 packs, 12 packs, and cases of 32. Your Base Unit is the individual can, so you would specify a conversion factor of 6, 12, and 32. The conversion factors are multipliers which represent the amount of Base Units required to complete each pack or case.

The "single can" UOM could be called "EA," which represents the Base Unit. The new Units of Measure could be labeled "6-pack," "12-pack," and "Case." If the forecast covers 1000 cans of soda, out of that number they are packaged as follows:

- fifteen cases – conversion factor of 32
- twenty 12-packs – conversion factor of 12
- thirty 6-packs – conversion factor of 6
- forty EA units

Units of Measure, using the conversion factors above, allow you to view data from the perspective of each type of package. You can see how many 6-packs have been forecasted in the Data - View/Edit - Table, which may display thirty 6-packs. If you then want to find out how many individual units that equates to you can change the table view to the EAUOM to find that a total of 180 cans of soda have been forecasted for the retailer using the 6-pack UOM. Units of Measure allow conversion **up** or **down** depending on the business requirement.

Viewing the UOM List

The List screen contains a product-only context selector, and has an at-and-below list.

To access the Company - UOM - List screen

1. Click on Company in the menu.
2. Select UOM. The UOM - List screen appears.

Figure 26–1 UOM - List Screen

Product	Global Item Number	Local Item Number	UOM	Other GIN	Other UOM	Multiplier
Doggy Bag Treats	0168132113	NAB0168132113	EA	0168132113Double	Double	2.00
Original Milkbone Biscuits	0321832138	NAB0321832138	EA	0321832138	sixpacks	6.00
Flavor Snacks	0680684527	NAB0680684527	EA	0680684527Dozens	Dozens	12.00

To change the Product you are viewing UOM factors for

1. Click on the product name. The Product selection tree appears.
2. Choose a new Product.
3. Click Set.

Figure 26–2 Product Selection Tree

Product	Global Item Number	Local Item Number	UOM	Other GIN	Other UOM	Multiplier
product1	0001	prod0001	EA	0001Double	Double	2.00
product2	0002	prod0002	EA	0002SIXPACKS	SIXPACKS	6.00
product3	0003	prod0003	EA	0003TENCASES	TENCASES	10.00

The List screen contains a column of links that will allow you to view and edit specific details for each UOM by clicking on the colored dots under the binoculars column.

UOM properties that can be modified through the List - Detail View include:

- Other GIN – This is the new Global Item Number for the converted product

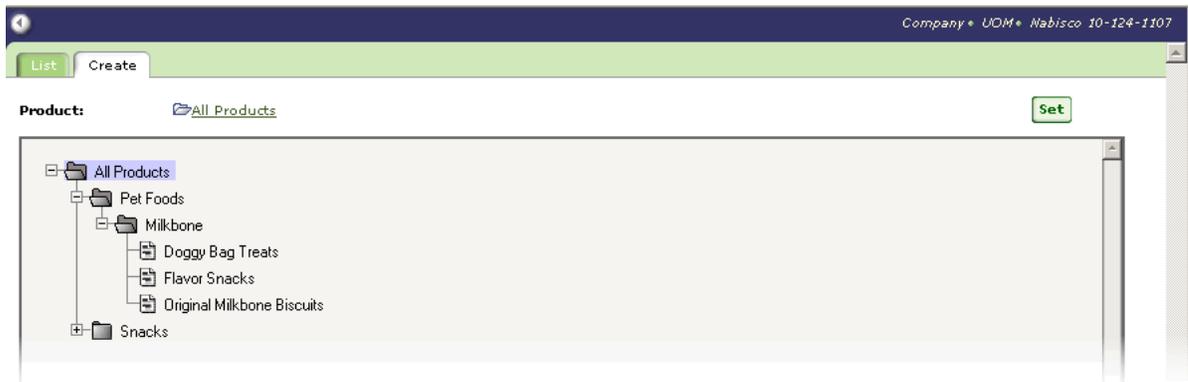
- Other UOM - New check box – Rather than selecting from a pre-existing Other UOM, you can enter a new UOM not already in the list by clicking the check box and entering the name in the text field provided.
- Other UOM – This is the name of the new unit-of-measure into which you are converting the product. It is the name that will appear in the data stream Display Mode tab under UOM. For example, if you are converting from **each** to **case**, this new UOM can be named: **CASE**.
- Multiplier – The conversion factor used to convert the number of individual units into the required unit-of-measure. Example: to convert individual units into SIXPACKS, the multiplier would be "6."

Creating New UOM Factors

To access the UOM Factor creation screen

1. Select Company from the menu.
2. Choose UOM from the Company sub-menu.
3. Select the Create tab. The Product tree appears.

Figure 26–3 Product Tree Screen



4. Select the Product name from the tree that you wish to create new UOM factors for. You cannot create new UOM factors at folder level, and must select a leaf level product.
5. Click the Set button. The Create screen appears.

Figure 26-4 Create Screen

The screenshot shows a web application interface for creating a UOM Factor. At the top right, it displays 'Company * UOM * Nabisco 10-124-1107'. Below this is a navigation bar with 'List' and 'Create' buttons. The main form area contains the following fields:

- Product:** Doggy Bag Treats
- GIN:** 0168132113
- UOM:** EA
- Other GIN:** [Text input box]
- Other UOM:** New [Dropdown menu showing 'Double']
- Multiplier:** [Text input box]

At the bottom of the form are two buttons: 'Save' and 'Cancel'.

6. Enter the Other GIN in the text box. The parameters you enter here must be unique for each company.
7. If Other UOM is new, select the check box and enter the information in the text box.
8. If the Other UOM is not new, select a pre-existing Other UOM from the drop-down.
9. Enter the Multiplier. The multiplier must be a numeric value.
10. Click Save.

Deleting UOM Factors

UOM Factors can be deleted by accessing the Company - UOM - List screen. To delete a UOM Factor

1. Select Company from the menu.
2. Select UOM. The List screen appears.
3. Select the Product name from the Product selector and click Set. The UOM Factors assigned to that Product name appear in the list below.
4. In the Delete column, choose the factors you wish to remove by clicking the check boxes individually, or by clicking on the delete icon which selects all check boxes for delete. The Delete button appears.
5. Click Delete.

Part IV

Appendices

Part IV consists of the following chapters:

- [VCC Supported Platforms](#)
- [User and Role Permissions](#)
- [Browser Settings](#)
- [Sample PDF Report Screens](#)
- [Geneva Forecast Engine](#)
- [VCC Locks and Jobs](#)
- [Safety Stock Calculation](#)
- [Language Encoding for Files Generated](#)
- [Data Stream Type Codes](#)

VCC Supported Platforms

This appendix contains platform support information for English Systems.

Supported Platforms

The diagram below applies to the English OS only. See Platforms supported by Oracle Retail VCC. for additional languages.

Figure A-1 Platforms supported by Oracle Retail VCC

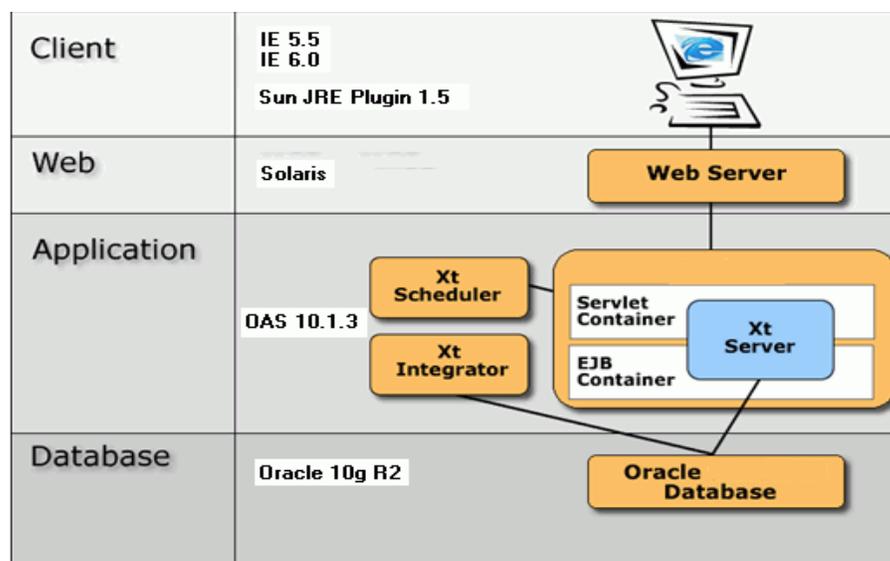


Table A-1 Platforms supported by Oracle Retail VCC

Component	OS	Supporting Software	OS Language
Oracle Retail VCC Database			
	UNIX	Oracle 10g R2	English
	Solaris 8	Oracle 10g R2	English
	Windows 2000 or XP Server	Oracle 10g R2	English, Japanese
Oracle Retail VCC Integrator			
	Solaris 8	Java 2 SDK 1.4.x	English

Table A-1 Platforms supported by Oracle Retail VCC

Component	OS	Supporting Software	OS Language
OLAP Cube Builder	Windows 2000 or XP Server	Java 2 SDK 1.4.x	English, Japanese
	Solaris 8	Java 2 SDK 1.4.x, ActivePerl 5.6.x	English
Oracle Retail VCC Server	Windows 2000 or XP Server	Java 2 SDK 1.4.x, ActivePerl 5.6.x	English, Japanese
	Solaris 8	Java 2 SDK 1.4.x	English
Oracle Retail VCC Scheduler	Windows 2000 or XP Server	Java 2 SDK 1.4.x	English, Japanese
	Solaris 8	Java 2 SDK 1.4.x	English
Web Server	Solaris 8	Web Browser Internet Explorer 5.5, 6.0 and higher Sun JRE plugin 1.5	English
	Windows 2000 or XP Server	Web Browser Internet Explorer 5.5, 6.0 and higher Sun JRE plugin 1.5	English, Japanese
Client	Windows 2000 Pro	IE 5.5, JVM, Acrobat 5.0	English, Japanese, Spanish, French, Korean
	Windows XP Professional	Web Browser Internet Explorer 5.5, 6.0 and higher Sun JRE plugin 1.5 JVM, Acrobat 5.0	English

VCC Database Server

General Requirements for a database server running VCC include:

- UNIX based OS certified with Oracle RDBMS 10g Enterprise Edition (options are AIX5.2, AIX5.3, Solaris 9, and HP-UX 11.11)
- Oracle RDBMS 10g Release 2 Enterprise Edition (minimum 10.2.0.1.0 patchset required) with the following patches and components.

Patches

4516865 (WRONG PERMISSIONS AFTER INSTALLATION IN OH AND SUBSEQUENT DIRECTORIES)

Components:

- Oracle Database 10g
- Oracle Partitioning
- Oracle Net Services
- Oracle Call Interface (OCI)
- Oracle Programmer
- Oracle XML Development Kit

VCC Application Server

General requirements for an application server capable of running the VCC application include:

- UNIX based OS certified with Oracle Application Server 10g 10.1.3. Options include AIX 5.2, AIX 5.3, Solaris 9, and HP-UX 11.11.
- Oracle Application Server 10g 10.1.3 with the following patches:
- 4992357 (ILLEGAL ACCESS ERROR WHEN ATTEMPTING TO LOAD ORACLE.SQL.CHARACTERSET CLASS)
- 4959854 (CANNOT RESTART MDB THROUGH OC4J AS CONSOLE)
- 4645524 (RETEK : RMIINITIALCONTEXTFACTORY DOES NOT WORK PROPERLY WITH GLOBAL JNDI)
- 4619599 (ABILITY TO CONTROL MDBS INITIAL STATE)

Note: This release of VCC is only supported in a managed OC4J instance as part of OracleAS 10g. It is not supported on OC4J standalone

Web Browser and Client requirements

General requirements for client running VCC include:

Client PC requirements

- Operating system is Windows 2000 or XP
- Display resolution: 1024x768
- Processor; minimum 1GHz
- Memory; minimum of 512MBytes
- Networking; Intranet with at least 10Mbps data rate.
- Sun JRE 1.5 32 bit

Browser Requirements

Microsoft Internet Explorer; version 5.5 or higher

B

User and Role Permissions

This appendix provides information on the user roles and permissions.

User Permissions

The following table summarizes the various permission for each VCC user role.

Table B-1 Permissions for Each VCC User Role

Main Menu	Sub Menu	Tabs	Subtabs	Action
Home	NONE	NONE		
Company	↳			
	Create	NONE		
	Master Data	ALL		
	Aggregates	↳		
		Create		
		List		
	Collaborations	NONE		
	Price Profile	ALL		
	Roles & Users	NONE		
	Disagg. Setup	↳		
		List		
		Create	↳	
			Context Based	
			Time Only	Create
		Daily Allocation		New / Edit / Save
	Module Config	↳		

Table B-1 (Cont.) Permissions for Each VCC User Role

Main Menu	Sub Menu	Tabs	Subtabs	Action
		Events	↵	
			Stream Set Configuration	Add / Edit / Delete
			General	
		Demand		Add / Edit / Delete
		Supply	↵	
			Stream Set Configuration	Add / Edit / Delete
			DAILY Db: Shipping Calendar	
			DAILY Db: Receiving Calendar	
		Exceptions		
	General Config	↵		
		Preferences		Save
		Groups		Edit / Add / Delete
		Links		Add / Edit / Delete
		Period Overlays		Create / View / Delete
	Purge Requests			Add / Delete Requests
	UOM	↵		
		List		Set
		Create		Set
Scheduler	NONE	ALL		
Monitor	NONE	↵		
		Jobs		
				Delete
		Usage		
		Current Connections		
		Server Locks		
Purge Data	NONE	NONE		
Roles & Users	NONE	NONE		
Configuration	NONE	↵		

Table B-1 (Cont.) Permissions for Each VCC User Role

Main Menu	Sub Menu	Tabs	Subtabs	Action
		Stream Types	↵	
			List	
			Assign	Save
		Modules		Save
		Links		Save / Edit / Delete / Add
		Language		View Details / Add / Delete
		General		
		Period		Create
Events*	↵			
	Overview	↵		
		Calendar		
		List		
				View
				Edit
				Copy
				Delete
				Change Status
				Status History
				Upload Documents
				Download Documents
		Create	↵	
				Attributes
				Edit Attributes
				Upload, Download Documents
	Promotions	↵		
		Calendar		
		List		
				Edit Items / Copy Event / Change Status / Delete Promotion
				Status History / Add Comment / Examine Promotion
		Create		

Table B-1 (Cont.) Permissions for Each VCC User Role

Main Menu	Sub Menu	Tabs	Subtabs	Action
				View: Attributes / Tactics / Items
				Upload, Download Documents
	Promotion Items			
		List		
				Delete Item
				Edit Item
				Examine
				Edit Item
				View Data
	Documents	↵		
		List		
				View / Edit / Delete
Demand	↵			
	Policy	↵		
		List		
				Delete
				Edit All
				View
				Edit
		Create		
	Interactive	NONE		
	Batch	↵		
		List		
				Apply Changes
				View
				Edit
		Create		
	Lift Factor (weekly DB only)			Edit
				View
Supply	↵			
	Policy	↵		

Table B-1 (Cont.) Permissions for Each VCC User Role

Main Menu	Sub Menu	Tabs	Subtabs	Action
		List		
				Delete
				Edit All
				View
				Edit
		Create		
	Interactive	NONE		
	Batch	↵		
		List		
				Apply Changes
				View
				Edit
		Create		
	Safety Stock	↵		
		List		
				Apply Changes
				View
				Edit
		Create		
Links	NONE	NONE		
Exception	↵			
	Inbox	ALL, but these:		
		Individual		View Comments
				Edit Comments
				Change Status
		Group		View Comments
				Edit Comments
				Change Status
		Read-Only		Delete
				View Comments
	Criteria	↵		
		Individual	↵	
			List	Delete

Table B-1 (Cont.) Permissions for Each VCC User Role

Main Menu	Sub Menu	Tabs	Subtabs	Action
			Create	Create / Advanced
				Apply Changes
				Copy / New / Delete
		Group	↵	
			List	Delete
			Create	
Data	↵			
	View/Edit	NONE		
				Create Aggregates
	Create	NONE		
	Revision History	NONE		
Metrics	NONE	↵		
		List		
				Apply Changes
		Create		
Reports	NONE	↵		
		List		
		Template		
		Create		
Extracts	NONE	↵		
		List		
		Create		
Preferences	↵			
	General	NONE		
	Layout	ALL, but one:		
		Lists		Report
	Password	NONE		
Help	ALL	NONE		
Logout	NONE	NONE		
Home	NONE	NONE		
Company	↵			
	Create	NONE		
	Master Data	ALL		

Table B-1 (Cont.) Permissions for Each VCC User Role

Main Menu	Sub Menu	Tabs	Subtabs	Action
	Aggregates	↵		
		Create		
		List		
	Collaborations	NONE		
	Price Profile	ALL		
	Roles & Users	NONE		
	Disagg. Setup	↵		
		List		
		Create	↵	
			Context Based	
			Time Only	Create
		Daily Allocation		New / Edit / Save
	Module Config	↵		
		Events	↵	
			Stream Set Configuration	Add / Edit / Delete
			General	
		Demand		Add / Edit / Delete
		Supply	↵	
			Stream Set Configuration	Add / Edit / Delete
			DAILY Db: Shipping Calendar	
			DAILY Db: Receiving Calendar	

* Although this table broadly defines Role access and editing privileges, Events module promotion editability may vary depending on the Creator Company and User stream and hierarchy access privileges. For instance, a Creator Company's superadmin can edit any events created by the company's users, while a manager can only edit promotions they create themselves. Likewise, Trading Partners will only be able to view, comment on, and change the promotion status of events not created by them.

Browser Settings

This appendix describes the recommended settings for your Web browser.

Internet Explorer Settings

If you experience browser issues when using Oracle Retail VCC, the following steps will help you configure your Internet Explorer version 5.5 or 6.0 for optimal use.

1. Select **Tools - Internet Options**.
2. Click the **General** tab. In the **Temporary Internet files** section click **Settings**. Under **Check for newer version of stored pages**, select the **Automatically** radio button
3. If you are experiencing problems running Internet Explorer, click the **Advanced** tab. Under **Browsing**, make sure that **Reuse windows for launching shortcuts** is not checked. This will ensure that downloads appear in a new window, and do not interfere with your use of Oracle Retail VCC.

Also under **Browsing**, be sure that the **Display a notification about every script error** check box is likewise not checked

4. Click **OK** to save browser configuration

Sample PDF Report Screens

Reports can be generated in Excel, RTF, CSV, Pipe delimited, or PDF format. The Extract report is a CSV (Microsoft® Excel) file. All remaining sample VCC Reports that follow were generated in PDF format:

- [Comment.](#)
- [Data Stream.](#)
- [Distributed Exception.](#)
- [Extract.](#)
- [Last Transaction.](#)
- [No Transaction.](#)
- [Promotion Detail.](#)

Comment

Figure D-1 Comment Report

Comment Report

Local : Nabisco at Piquatuck
 Partner : Speedy Rx at Boston
 Product : Planters Cashews

Start Date : 10/20/03
 End Date : 11/02/03
 Report Run Date : 10/24/03

Creator	Partner	Product	Stream Type Name	Stream Item Name	Period	# of Periods from Current	Quantity	Comments
Nabisco at Piquatuck	Speedy Rx at Boston	Planters Cashews	Movement17	Movement17-tot	10/20/03 - 10/26/03	0	223.80	This is a Comment
Nabisco at Piquatuck	Speedy Rx at Boston	Planters Cashews	Movement17	Movement17-tot	10/27/03 - 11/02/03	1	228.80	This is a Comment
Nabisco at Piquatuck	Speedy Rx at Boston	Planters Cashews	Movement17	Movement17-1	10/29/03 - 10/26/03	0	15.00	This is a Comment
Nabisco at Piquatuck	Speedy Rx at Boston	Planters Cashews	Movement17	Movement17-1	10/27/03 - 11/02/03	1	20.00	This is a Comment
Nabisco at Piquatuck	Speedy Rx at Boston	Planters Cashews	Movement17	Movement17-2	10/20/03 - 10/26/03	0	6.80	This is a Comment
Nabisco at Piquatuck	Speedy Rx at Boston	Planters Cashews	Movement17	Movement17-2	10/27/03 - 11/02/03	1	6.80	This is a Comment
Nabisco at Piquatuck	Speedy Rx at Boston	Planters Cashews	EA-PK-Measure	EA-PK-Measure	10/27/03 - 11/02/03	1	44.00	This is a Comment
Nabisco at Piquatuck	Speedy Rx at Boston	Planters Cashews	Balance29	DC Receipts	10/20/03 - 10/26/03	0	101.00	This is a Comment
Nabisco at Piquatuck	Speedy Rx at Boston	Planters Cashews	EA-PK-Measure	EA-PK-Measure	10/20/03 - 10/26/03	0	32.00	This is a Comment
Reason	Reason Status							
MULTI	None							
MULTI	None							
Order policy change	None							
Overstock condition	None							
Price change	None							
Product changeover	None							
Production issue	Accepted							
Production issue	Superseded							
Revised promotion	Superseded							

Data Stream

Figure D-2 Data Stream Report

Data Stream Report

Local : Nabisco at Pisquattuck Start Date : 09/29/03
 Partner : Speedy Rx at Boston End Date : 11/02/03
 Product : Planters Cashews Report Run Date : 10/24/03

Creator	Partner	Product	Stream Type Name	Stream Item Name	Unit of Measure	Offset	09/29/03	10/06/03	10/13/03	10/20/03	10/27/03
							+3	+2	+1	0	1
Nabisco at Pisquattuck	Speedy Rx at Boston	Planters Cashews	Movement17	POS Fcst Bas	Base Units	Current	101.00	101.00	101.00	15.00	20.00
Nabisco at Pisquattuck	Speedy Rx at Boston	Planters Cashews	Movement17	POS Fcst Bas	Base Units	Yr-Ago	19.00	19.00			
Nabisco at Pisquattuck	Speedy Rx at Boston	Planters Cashews	Movement17	POS Fcst Pro	Base Units	Current	6.80	6.80	6.80	6.80	6.80
Nabisco at Pisquattuck	Speedy Rx at Boston	Planters Cashews	Movement17	POS Fcst Pro	Base Units	Gen 01					6.80
Nabisco at Pisquattuck	Speedy Rx at Boston	Planters Cashews	Movement17	POS Fcst Pro	Base Units	Yr-Ago					
Nabisco at Pisquattuck	Speedy Rx at Boston	Planters Cashews	Movement17	POS Fcst Sea	Base Units	Current	202.00	202.00	202.00	202.00	202.00
Nabisco at Pisquattuck	Speedy Rx at Boston	Planters Cashews	Movement17	POS Fcst Sea	Base Units	Gen 02					
Nabisco at Pisquattuck	Speedy Rx at Boston	Planters Cashews	Movement17	POS Fcst Sea	Base Units	Yr-Ago					
Nabisco at Pisquattuck	Speedy Rx at Boston	Planters Cashews	Movement17	POS Fcst Tot	Base Units	Current	309.80	309.80	309.80	223.80	228.80
Nabisco at Pisquattuck	Speedy Rx at Boston	Planters Cashews	Movement17	POS Fcst Tot	Base Units	Gen 03					
Nabisco at Pisquattuck	Speedy Rx at Boston	Planters Cashews	Movement17	POS Fcst Tot	Base Units	Yr-Ago	19.00	19.00			

Extract

Figure D-4 Extract

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Lisa Hill	Speedy R	30-333-333	30-333-333	10-124-11C	10-124-11C	1.69E+08	Balance28	DC Invento	10	#####	#####	Base Units		
2	Lisa Hill	Speedy R	30-333-333	30-333-333	10-124-11C	10-124-11C	1.69E+08	Balance28	DC Invento	20	#####	#####	Base Units		
3	Lisa Hill	Speedy R	30-333-333	30-333-333	10-124-11C	10-124-11C	1.69E+08	Balance28	DC Invento	30	#####	#####	Base Units		
4	Lisa Hill	Speedy R	30-333-333	30-333-333	10-124-11C	10-124-11C	1.69E+08	Balance28	DC Invento	40	#####	#####	Base Units		
5	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	101	#####	#####	Base Units		
6	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	6.8	#####	#####	Base Units		
7	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	202	#####	#####	Base Units		
8	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	309.8	#####	#####	Base Units		
9	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	101	#####	#####	Base Units		
10	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	6.8	#####	#####	Base Units		
11	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	202	#####	#####	Base Units		
12	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	309.8	#####	#####	Base Units		
13	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	101	#####	#####	Base Units		
14	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	6.8	#####	#####	Base Units		
15	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	202	#####	#####	Base Units		
16	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	309.8	#####	#####	Base Units		
17	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	15	#####	#####	Base Units This is a C	13	
18	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	6.8	#####	#####	Base Units This is a C	15	
19	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	202	#####	#####	Base Units		
20	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	223.8	#####	#####	Base Units This is a C MULTI		
21	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Balance29	DC Receipt	101	#####	#####	Base Units This is a C	8	
22	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	EA-PK-Me	EA-PK-Me	33	#####	#####	Base Units This is a C	3	
23	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	20	#####	#####	Base Units This is a C	11	
24	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	6.8	#####	#####	Base Units This is a C	17	
25	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	202	#####	#####	Base Units		
26	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	Movement	POS Fcst	228.8	#####	#####	Base Units This is a C MULTI		
27	Dave Wils/Nabisco		10-124-11C	10-124-11C	30-333-333	30-333-333	1.69E+08	EA-PK-Me	EA-PK-Me	44	#####	#####	Base Units This is a C	8	

Last Transaction

Figure D-5 Last Transaction Report

Last Transaction Report

Local : Dave Wils-All Locations Report Run Date : 10/24/03
 Partner : Dave Wils-All Partners End Date : 04/06/03
 Product : Dave Wils-All Products

Creator	Partner	Product	Date Stream	Aggregate Rows	Collaboration Rows	Transaction Rows	Last Transaction Date
		Doggy Bag Treats		0			
		Flavor Snacks		0			
		Original Millstone Substrats		0			
		Flanors Customo		0			
		Flanors Holiday Park		0			
		Flanors Mixed Sub		0			
Habison at Domete	Wall Drugs at Jacksonville	Doggy Bag Treats			2		
Habison at Domete	Wall Drugs at Jacksonville	Doggy Bag Treats	Balance28			209	12/16/02
Habison at Domete	Wall Drugs at Jacksonville	Doggy Bag Treats	Balance29			209	12/16/02
Habison at Domete	Wall Drugs at Jacksonville	Doggy Bag Treats	Movement44			50	02/05/01
Habison at Domete	Wall Drugs at Jacksonville	Doggy Bag Treats	Movement17			680	12/16/02
Habison at Domete	Wall Drugs at Jacksonville	Doggy Bag Treats	Movement2			419	12/16/02
Habison at Domete	Wall Drugs at Jacksonville	Doggy Bag Treats	Trns			316	08/14/01
Habison at Domete	Wall Drugs at Jacksonville	Flavor Snacks			2		
Habison at Domete	Wall Drugs at Jacksonville	Flavor Snacks	Balance28			209	12/16/02
Habison at Domete	Wall Drugs at Jacksonville	Flavor Snacks	Balance29			209	12/16/02
Habison at Domete	Wall Drugs at Jacksonville	Flavor Snacks	Movement44			26	02/05/01
Habison at Domete	Wall Drugs at Jacksonville	Flavor Snacks	Movement17			676	12/16/02
Habison at Domete	Wall Drugs at Jacksonville	Flavor Snacks	Movement2			419	12/16/02
Habison at Domete	Wall Drugs at Jacksonville	Flavor Snacks	Trns			212	08/14/01
Habison at Domete	Wall Drugs at Jacksonville	Original Millstone Substrats			2		
Habison at Domete	Wall Drugs at Jacksonville	Original Millstone Substrats	Balance28			209	12/16/02
Habison at Domete	Wall Drugs at Jacksonville	Original Millstone Substrats	Balance29			209	12/16/02
Habison at Domete	Wall Drugs at Jacksonville	Original Millstone Substrats	Movement44			26	02/05/01
Habison at Domete	Wall Drugs at Jacksonville	Original Millstone Substrats	Movement17			657	12/16/02
Habison at Domete	Wall Drugs at Jacksonville	Original Millstone Substrats	Movement2			419	12/16/02

No Transaction

Figure D-6 No Transaction Report

No Transaction Report

Creator	Partner	Product
Habisco at Denver	Kali Drugs at Jacksonville	Planters Mound Bats
Habisco at Denver	Kali Drugs at Jacksonville	Planters Cashews
Habisco at Denver	Kali Drugs at Jacksonville	Flavor Shakes
Habisco at Denver	Kali Drugs at St. Cloud	Planters Mound Bats
Habisco at Denver	Kali Drugs at St. Cloud	Planters Cashews
Habisco at Denver	Kali Drugs at St. Cloud	Original Mithras Skatole
Habisco at Denver	Kali Drugs at Redwing	Doggy Bag Treats
Habisco at Denver	Kali Drugs at Redwing	Planters Cashews
Habisco at Denver	Kali Drugs at Redwing	Original Mithras Skatole
Habisco at Denver	Kali Drugs at Redwing	Flavor Shakes
Habisco at Denver	Kali Drugs at Redwing	Planters Holiday Pck
Habisco at Pingatuck/Outk Stop at Riverhead		Planters Cashews
Habisco at Pingatuck/Outk Stop at Riverhead		Planters Holiday Pck
Habisco at Pingatuck/Outk Stop at Brooklyn		Planters Cashews
Habisco at Pingatuck/Outk Stop at Brooklyn		Planters Holiday Pck
Habisco at Pingatuck/Outk Stop at Manhattan		Planters Mound Bats
Habisco at Pingatuck/Outk Stop at Manhattan		Planters Holiday Pck
Habisco at Denver	Kali Drugs at Jacksonville	Original Mithras Skatole
Habisco at Denver	Kali Drugs at Jacksonville	Planters Holiday Pck
Habisco at Denver	Kali Drugs at St. Cloud	Doggy Bag Treats
Habisco at Denver	Kali Drugs at St. Cloud	Flavor Shakes
Habisco at Denver	Kali Drugs at St. Cloud	Planters Holiday Pck
Habisco at Denver	Kali Drugs at Riverhead	Planters Mound Bats
Habisco at Pingatuck/Outk Stop at Riverhead		Planters Mound Bats
Habisco at Pingatuck/Outk Stop at Brooklyn		Planters Mound Bats
Habisco at Pingatuck/Outk Stop at Manhattan		Planters Cashews

Promotion Detail

Figure D-7 Promotion Detail Report

Promotion Detail Report

Event ID	Event Name	Event Description	Event Category	Begin Date	End Date	Total Monetary Sales	Total Actual Sales	Total Base Sales Forecast				
VCC_12	Event Report	Event Report Description/Assortment Charge	10/03/03	10/31/03	793.00	793.00	1,181.00					
Total Promo Sales Forecast						Total DC Order Forecast	Total DSD Order Forecast	Total Forward Buy Forecast	Total On-Hand Inventory	Comments	Last Changed By	
102.00						1,181.00		3,030.00			Event Report Comment	2003-10-24 20:29:14
Promotion ID	Status	Total Monetary Sales	Total Actual Sales	Total Base Sales Forecast	Total Promo Sales Forecast	Total DC Order Forecast	Total DSD Order Forecast					
VCC_12	Modified	793.00	793.00	1,181.00	102.00		1,181.00					
Total Forward Buy Forecast		Total On-Hand Inventory	First Ship Date	Last Changed Date	Partner Promotion ID	User Defined #1	User Defined #2					
3,030.00			2003-10-24 16:32:13			User Defined Column 1	User Defined Column 2					
Local	Partner	Product	Begin Date	End Date	Comments	Promotion Item ID	DC Order Forecast	DSD Order Forecast				
Habisco at Pingatuck/Speedy Rx at Boston	Planters Cashews		09/29/03	10/27/03	This is Item Comment	VCC_11	338.00					
Habisco at Pingatuck/Speedy Rx at Boston	Planters Mound Bats		09/29/03	10/27/03	This is Item Comment	VCC_12	585.00					
Habisco at Pingatuck/Speedy Rx at Boston	Planters Holiday Pck		09/29/03	10/27/03	This is Item Comment	VCC_13	339.00					
Forward Buy Forecast	Inventory Sales	On Hand Inventory	Average Base Price	Average Promo Price	Base Sales Forecast	Promo Sales Forecast	Actual Sales	Planned Life				
1,018.00			5.25	-2.15	338.00	34.00	239.00	.10				
1,018.00			5.80	-2.05	605.00	34.00	176.00	.07				
1,018.00			5.75	-1.95	338.00	34.00	378.00	.10				

Promotion Detail Report

Actual Life	Percent Sell
-.03	
-.05	
-.12	
64.25	
32.65	
101.61	

Creation Date	User	Comments	Company
2003-10-24 20:29:14	Dave Wilson	Promotion Level comment. This is the threaded comment.	Habisco

Category	Tactic	Begin Date	End Date	Value	Unit of Measure	Comments
As	Billboard	10/06/03	10/06/03	11	uon1	This is comment for tactic
Display	Display (general)	10/06/03	10/06/03	22	uon2	This is comment for tactic
Consumer Incentive	BCO/Boy x Get y	10/06/03	10/06/03	33	uon3	

Geneva Forecast Engine

This appendix provides information on the Geneva forecasting engine.

How Does Geneva Work?

The Geneva algorithm seeks to optimize forecasts by minimizing a Mean Squared Error (MSE). This is completed by conducting a competition between combinations of data filters and forecasting models, each of which is optimized over its relevant parameter vector. The optimal model is derived by a two-stage optimization process. At one level, different combinations of data filters and models are compared. At another level, each model is optimized according to its own specific parameters, each of which is adjusted to hone the individual method to yield its best results. The competition is conducted by predicting the last data values provided using the data values from time periods prior to the predicted ones.

The top-level competition is between each combination of a specific type of forecasting method used in conjunction with a specific form of the filtered data series. The different forecasting methods include different types of linear and non-linear regression methods and exponential smoothing methods. The different forms of the data series are generated by the application of smoothing functions and deseasonalization functions to the original series. Combinations of these two choices are compared to find the method-series model that gives the best fit over the most recent data.

For each model under consideration, a further optimization is conducted to adjust the model internally to its best state. Each parameter is allowed to range over a set of values as specified by the user or by system defaults. Since all the parameters must be varied concurrently, this generally yields a large number of comparisons even within a specific model. Therefore, although full optimization is a powerful tool, it must be utilized with some care, as the magnitude of operations requested increases multiplicatively with every augmentation to parameter searching.

The candidate data filters used are: no transformation, a moving median filter, a moving periodic total (MPT) filter, an MPT filter of the moving median filtered data, seasonal adjustment of untransformed data, and seasonal adjustment of the moving median filtered data.

The candidate forecasting methods used are: linear regression, five types of non-linear transformation regression, single exponential smoothing, double exponential smoothing with trend damping, and Holt-Winters smoothing with trend damping. The Holt-Winters method incorporates seasonal adjustment and is therefore not valid when used with the MPT filter or with seasonally adjusted data.

The optimization problem can be restated as follows:

1. Find the optimal data filter i^* and optimal method j^* by solving:

$t=n$

$\min E (f(j(i(y_1)))^t - y_t)^2 / v$

$i, j \ t=n-v+1$

where

n = Length of time series

v = Length of holdout period, usually $n/3$

y_1 = Historical data from $t=1$ to $t=n-v$

y = Historical data

$f(j(i(y_1)))$ = Forecast using filter i and method j on input data y_1

- Data Filters

- 1 = No data filtering
- 2 = Moving median of window length w
- 3 = Moving periodic total of cycle length p for original data
- 4 = Moving periodic total of cycle length p for data prefiltered by method 2
- 5 = Seasonally adjusted original data
- 6 = Seasonally adjusted data prefiltered by method 2

- Forecasting Methods

- 1 = Regression
- 2 = Nonlinear Regression 1: $x' = \log(x)$; $y' = \log(y)$
- 3 = Nonlinear Regression 2: $x' = x$; $y' = \ln(y)$
- 4 = Nonlinear Regression 3: $x' = \log(x)$; $y' = y$
- 5 = Nonlinear Regression 4: $x' = 1/x$; $y' = 1/y$
- 6 = Nonlinear Regression 5: $x' = x$; $y' = \ln(y / (K-y))$
- 7 = Single Exponential Smoothing
- 8 = Double Exponential Smoothing
- 9 = Holt-Winters Exponential Smoothing

2. Forecast with optimal filter i^* and optimal method j^* using entire time series y , re-optimize method-specific forecasting parameters.

VCC Locks and Jobs

This appendix contains the following topics:

- [About Locks and Jobs.](#)
- [User Generated Jobs.](#)
- [User Save-Action Locks.](#)
- [Scheduler Jobs.](#)
- [Loader Jobs.](#)
- [Extractor Jobs.](#)

About Locks and Jobs

Jobs and Locks are divided into category Types that are integral to understanding the tables that follow.

Job Types

Each job does one or more of the following:

1. Reads hierarchy – takes a snapshot of current hierarchy before continuing processing
2. Reads data stream – reads information included as of the time processing begins
3. Updates data stream – configures the number of retries
4. Updates hierarchy – updates the hierarchy
5. Extracts data – extracts data from VCC database
6. Other – may read or write to other tables

Lock Types

Each job can activate one or more of the 3 types of lock:

- Company-Self Lock (CSL) – User and Scheduler jobs. This will block the same job for the same company.

Example:

While Scheduler event processing "CompanyA - Recalc Metrics" is active, another attempt to run the same task for the same company is blocked.

- Integrator-Self Lock (ISL) – Integrator Load jobs. This will block the same job for the same Loader type.
- Database STC Lock (DSL) – Database Stream Type Code Locks operate based on load volume. For more information, see "About Load Volume" in the Implementor Guide.

User Generated Jobs

Job Screen Display	Job Type(s)	Lock Type	Job/Lock Trigger (UI Trigger)
Create Aggregates/Create Aggregates on Demand	1, 2	CSL	Click Create in Co-Agg-Review Selections; Click Create Agg-on-Demand from Data Stream > View/Edit; Click Create in Co-Disagg. Setup > Create.
Create Disaggregation Profile	1, 2	Create Aggregates lock	Click "Create" button in Company > Disagg. Setup.
Create/Edit Event	3	CSL, DSL	Click "Save" button in Events-Create screen after creating an Event.
Create Periods	4	None	Click "Save" button in Configuration-Periods screen.
Create Price Profile	1, 3	DSL	Click "Set" button in Company-Price Profiles-Create-Edit screen after entering Base Price.
Delete Aggregates	6	Create Aggregates lock	Click "Delete" or "Delete All" in the Aggregate List screen. Click "Delete" or "Delete All" in an Aggregate's View Period screen.
Modify Access Rights	4	None	Click "Start Editing" button on Roles & Users-Edit Hierarchy Access screen.
Modify Collaborations	1	None	Click "Start Editing" button in Company > Create Collaboration screen.
Modify Location Hierarchy	4	CSL	Click "Start Editing" button on Master Data-Locations.
Modify Product Hierarchy	4	CSL	Click "Start Editing" button on Master Data-Products.
Modify Partner Hierarchy	4	CSL	Click "Start Editing" button on Master Data-Partners.
Modify Period Hierarchy	4	CSL	Click "Save" button in Configuration-Periods.
Process Demand Forecast On Demand	2,3	CSL	Click "Process Selected Items" after checking box for Process on Demand in Demand Policy List.
Process Event Totals on Demand	2	None	Click "Process Selected Items" after checking box for Process Totals in Events-List or in Promotions-List.
Process Exceptions on Demand	1, 2, 3	DSL	Click "Process Selected Items" after checking box for Process on Demand in Exceptions List.

Job Screen Display	Job Type(s)	Lock Type	Job/Lock Trigger (UI Trigger)
Process Lift Factor on Demand	1, 2, 3	DSL	Click "Save" after clicking "Set" in Lift Factor screen.(Only available for Daily database).
Process Metrics on Demand	1, 2, 3	DSL	Click "Process Selected Items" after checking box for Process on Demand in Metrics List.
Process Reports on Demand	1, 2	None	Click "Process Selected Items" after checking box for Process on Demand in Reports List screen.
Process Safety Stock on Demand	1, 2, 3	DSL	Click "Process Selected Items" after checking box for Process on Demand in Supply Stream Set-List.
Process Supply Policies on Demand	1, 2, 3	DSL	Click "Process Selected Items" after checking box for Process on Demand in Supply Policy List.
Purge Collab. Item Comments	6	None	Click "Purge" button in Purge Data screen after selecting "Collab. Items Comments Purge" check box.
Purge Events	6	None	Click "Purge" button in Purge Data screen after selecting "Events Purge" check box.
Purge Exceptions	6	None	Click "Purge" button in Purge Data screen after selecting "Exceptions Purge" check box.
Purge Jobs Monitor	6	None	Click "Purge" button in Purge Data screen after selecting "Jobs Monitor Purge" check box.
Purge Master Data	6	None	Click "Purge" button in Purge Data screen after selecting "Master Data Purge" check box.
Purge Transaction Data	6	None	Click "Purge" button in Purge Data screen after selecting "Transaction Purge" check box.
Replace Product GIN	6	None	Click "Save" after changing GIN in Product Examine screen. (Click "Start Editing" not required here. No job if other than GIN is changed.)
TagAggregates/Stat Factor Change	1, 2	None	Click Save in Master Data - Product - Examine after making change to Stat Factor.
TagAggregate/Units Per Load Change	1, 2	None	Click Save in Master Data - Product - Examine after making change to Units Per Load.
Update Disaggregation Factors	1, 2	None	Click "Process on Demand" in Co-Disagg. Setup-List-Edit screen after selecting check box for "Computed Factors" profile orClick Save & Recalc in Review or Edit screen after entering new value for checked override for "Computed Factors" profile.

User Save-Action Locks

Save Data Stream Screen	Job Type	Lock Type	Lock Trigger (UI Trigger)
Save data stream in Data-Mass Entry	3	DSL	Click "Save" button after entering data.
Save data stream in Data-View Edit	3	DSL	Click "Save" button after entering data.
Save data stream in Demand-Interactive	3	DSL	Click "Save" or "Save All" button after entering data.
Save data stream in Demand-Lift Factor	3	DSL	Click "Save" on a Lift Factor Set-up.
Save data stream in Event-Promotion Item-View Data	3	DSL	Click "Save" button after entering data.
Save data stream in Supply-Interactive	3	DSL	Click "Save" or 'Save All' button after entering data.
Save data stream in Supply-Safety Stock	3	DSL	Click Process on Demand on a Safety Stock "Time Series" listing.

Scheduler Jobs

Job Screen Display	Job Type	Lock Type	Job/Lock Trigger (Execute a task event through the Scheduler)
Complete Exception Criteria Creations	1, 2	CSL	Complete Exception Criteria Creation
Extract Collaboration Items	5	None	See Job ID 1115
Extract Demand Policy	5	None	See Job ID 1115
Extract Disagg. Factors	5	None	See Job ID 1115
Extract Disagg. Profile	5	None	See Job ID 1115
Extract Events	5	None	See Job ID 1115
Extract Exception Criteria	5	None	See Job ID 1115
Extract Exceptions	5	None	See Job ID 1115
Extract Collaboration Products	5	None	See Job ID 1115
Extract Master Data	5	None	See Job ID 1115
Extract Metrics	5	None	See Job ID 1115
Extract Price Profile	5	None	See Job ID 1115
Extract Supply Blocked Dates	5	None	Extract Supply Blocked Dates
Extract Supply Policy	5	None	See Job ID 1115

Extract UOMs	5	None	Extract UOMs
Extract Users	5	None	Extract Users
Process Aggregate Actions	3	CSL	Process Aggregate Actions
Process Exception Alerts & Send Exception Alerts	6	None	Process Exception Alerts and Send Exception Alerts. If recipient e-mail address is supplied in Exception - Criteria - Create and sender e-mail address is supplied in VCC Config - Server - Messaging, also see Send Exception Alerts.
Process Aggregate Exceptions	1, 2, 3	CSL	Process Aggregate Exceptions
Process Extract Requests	5	None	Process Extract Requests with no pending requests. When pending requests are in Extract Module, also see job entry for Process Extract Requests: Extract Collaboration Items Extract Collaboration Products Extract Demand Policy Extract Disagg. Factors Extract Disagg. Profile Extract Events Extract Exception Criteria Extract Exceptions Extract Master Data Extract Metrics Extract Price Profile Extract Supply Policy
Process Leaf Actions	1, 2, 3	CSL	Process Leaf Actions
Process Leaf Exceptions	1, 2, 3	CSL	Process Leaf Exceptions
Purge Jobs Monitor	6	None	Purge Jobs Monitor When there are more jobs listed than the Number n to be retained (n defaults to 50k in the UI, and can be modified)
Recalculate Aggregates	1, 2, 3	CSL	Recalculate Aggregates
Recalculate Disaggregation Factors	1, 2	CSL	Recalculat Disaggregation Factors
Recalculate Metrics	1, 2, 3	CSL, DSL	Recalculate Metrics
Report Usage and Send Usage Report	1, 2	CSL	Report Usage ...If recipient e-mail address is supplied and 'Send' check box is checked in Config-Billing, and sender e-mail address is supplied in VCC Configuration-Server-Messaging...also see Send Usage Report
Roll Exception Criteria	1, 2	CSL	Roll Exception Criteria
Run and Send Reports	1, 2	CSL	Run and Send Reports
Run Demand & Lift Factor Batch Requests	1, 2, 3	CSL, DSL	Run Batch Demand & Lift Factor Requests
Run Demand Batch Requests	1, 2, 3	CSL, DSL	Run Batch Demand Requests
Run Lift Factor Batch Requests	1, 2, 3	CSL, DSL	Run Batch Lift Factor Requests
Run Reports	1, 2	CSL	Run Reports

Run Safety Stock Batch Requests	1, 2, 3	CSL, DSL	Run Safety Stock Requests
Run Supply & Safety Stock Batch Requests	1, 2, 3	CSL, DSL	Run Batch Supply Requests
Run Supply Batch Requests	1, 2, 3	CSL, DSL	Run Supply Batch Requests
Send Exception Alerts	6	None	See Job ID 1109
Send Promotion Alerts	6	None	Send Promotion Alerts
Send Reports	6	None	Send Reports
Send Usage Report	6	None	See Job ID 1136
Update Promotion	6	None	Update Promotions

Loader Jobs

Job Screen Display	Job Type	Lock Type	Job/Lock Trigger: Click "Run" button on Integrator - Loader after selecting control file for...
Int - Load Aggregate Definitions	1, 2	Create Aggregates Lock	Aggregate Definitions
Int - Load Aggregate Stream	3	ISL, DSL	Aggregate Stream Data
Int - Load Collaboration Item	6	ISL	Collaboration Item
Int - Load Demand Policy	1	ISL	Demand Policy
Int - Load Demand Stream Set	1	ISL	Demand Stream Set
Int - Load Disagg. Profile	1	Create Aggregates lock	Disagg. Profile
Int - Load Events	3	ISL	Events
Int - Load Event Stream Set	6	None	Event Stream Set
Int - Load Exception Criteria	6	ISL	Exception Criteria
Int - Load Exceptions	6	ISL	Exception
Int - Load Leaf Stream	3	ISL, DSL	Leaf Stream Data
Int - Load Master Data	6	ISL	The desired Master Data files: Location Partners, Products, Periods, User's
Int - Load Metrics	1, 2, 3	ISL	Metrics
Int - Load Multiple	6	ISL	(When multiple control files for different loaders are included in the `run`.)
Int - Load Price Profile	1, 3	ISL, DSL	(Price) Profile Stream Data

Int - Load Supply Blocked Dates	6	ISL	Supply Blocked Dates
Int - Load Supply Policy	6	ISL	Supply Policy
Int - Load Supply Stream Set	6	None	Supply Stream Set
Int - Load UOMs	6	None	UOM
Int - Local Custom Tasks	6	None	Custom Tasks

Extractor Jobs

Job Screen Display	Job Type	Job/Lock Trigger: Click "Run" button on Integrator - Extractor after selecting control file for...
Int - Extract All Stream Changes	5	All Stream Changes
Int - Extract Current Aggregate Stream	5	Current Aggregate Stream
Int - Extract Current Leaf Stream	5	Current Leaf Stream
Int - Extract Manual Stream Changes	5	Manual Stream Changes

Safety Stock Calculation

This appendix describes the safety stock calculations used in the application.

Input Variables

Variable	Units	Symbol	Notes
Service Level	%	SL	Static input, value chosen by user from list.
Average Product Demand	Units per base period		(Consumption) in units per day Calculated, choice of generation basis (Actual, Calculated, or Forecasted) and choice of date range
Standard Deviation of Demand	Units per base period	s(D)	(Consumption) Formula 1, below, is used
Average Order Processing Time	Base period		Defaults to the value specified in the Profile; may be manually edited by the user
Average Transit Time	Base period		Manually input by user.
Average Lead Time	Base period		Average delivery lead time: calculated as sum of Average Order Processing Time and Average Transit Time
Standard Deviation of Lead Time	Base period	s(LT)	Formula 2, below, is used.

Formulae Used

This section includes all the formulae used for VCC demand forecasting.

Standard Deviation Formula

Standard Deviation of demand is calculated as follows.

Figure G-1 Standard Deviation Formula

$$s D = \sqrt{\frac{\sum_{i=1}^n (D_i - \bar{D})^2}{n - 1}}$$

where:

s(D)	Standard Deviation of demand
n	Number of observations
D _i	Each observation of demand
\bar{D}	Mean demand

Combined Standard Deviation of Demand and Lead-Time Formula

Combined standard deviation of demand and lead-time is calculated as follows.

Figure G-2 Combined Standard Deviation of Demand and Lead-Time Formula

$$s D LT = \sqrt{\bar{LT} s D^2 + 2s LT \bar{D}}$$

where:

s(D)	Standard Deviation of demand
\bar{D}	Mean demand
\bar{LT}	Average lead time
s(LT)	Standard deviation of lead time
s(D,LT)	Combined standard deviation

Standard Fill Rate-Driven Safety Stock Calculation Formula

Safety Stock. A standard fill rate-driven safety stock calculation is used; it assumes that the underlying distribution of demand is normal.

Figure G-3 Standard Fill Rate-Driven Safety Stock Calculation Formula

$$SS = k s D LT$$

where:

SS	Safety Stock
----	--------------

where:

K	Safety Stock Factor
s(D,LT)	Combined standard deviation

Note: The "safety stock factor" is calculated as the inverse of the standard normal cumulative distribution, taking the desired service level (SL) expressed as a probability (i.e., 99.9% = .9990)

The following table shows examples of k for various service levels.

Service Level	k
99.9%	3.08
99.0%	2.33
95.0%	1.645
90.0%	1.28

Safety Stock Logic

This section describes the logic used to perform safety stock calculations. Note that some data elements are read from the job, some are read from the Supply policy, and some are read from data streams, as configured in Stream Configuration. If Safety Stock Type = Fixed in the Supply policy, then the output value is saved back to the Safety Stock field in the policy. If Safety Stock Type = Stream, then the safety stock values are calculated out in time to the Planning Horizon specified in the Supply policy, and are populated back into the configured stream. If the Planning Horizon is null, then safety stock is calculated for as many periods as there is forecast data.

Single Value Calculations

The Safety Stock value (or time series) is calculated as follows:

Normal:

Figure G-4 Single Value Calculations

$$SS = k\sigma$$

Item	Description	Source
SS	Safety Stock	Calculated - output of the formula
k	Service Level Factor	The inverse of the standard normal cumulative distribution, taking the desired service level (from the item profile) as a probability. This can be calculated using the inverseNormalCdf method in class VisualNumerics.math.Statistics in the JNL available from Visual Numerics, Inc. Alternatively, a lookup table can be generated using the normsinv() function in Microsoft Excel.

Item	Description	Source
σ	Estimator of Standard Deviation of demand during the lead time	Calculated using the given basis, date range, and error estimator

Sigma in the above equation is calculated as follows:

Figure G-5 Formula to Calculate Estimator of Standard Deviation of Demand

$$\sigma = \sqrt{\mu_t \sigma_d^2 + \mu_d^2 \sigma_t^2}$$

Item	Description	Source
σ	Standard deviation of demand during the lead time	Calculated
μ	Mean demand during the lead time	Calculated
σ_d	Standard deviation of demand during a period	Calculated
σ_t	Standard deviation of lead time (in terms of periods)	Read from Supply Policy
μ_d	Mean of demand during a period – calculated	Calculated
μ_t	Mean lead time (in terms of periods)	Read from Supply Policy

For a basis other than forecast error, the actual standard deviation of the given data stream is used:

Figure G-6 Formula to Calculate Mean of Demand during a period

$$\mu_d = \frac{1}{n} \sum_{i=1}^n D_i$$

Figure G-7 Formula to Calculate Standard deviation of demand during a period

$$\sigma_d = \sqrt{\frac{\sum_{i=1}^n (D_i - \mu_d)^2}{n-1}}$$

Item	Description	Source
σ_d	Standard deviation per period	Calculated
i	time period i	Counter
n	number of time periods	Calculated
D_i	Demand at period i (either actual or forecast)	Read from current_stream
μ_d	Mean demand for a period	Calculated

If the forecast error is chosen as the basis, then you are allowed to pick the estimator used, either MAD or MSE

For MAD:

Figure G-8 Formula to Calculate MAD

$$\sigma_d = 1.25 \times MAD$$

$$MAD = \left(\frac{1}{n}\right) \sum_{i=1}^n |F_i - D_i|$$

Item	Description	Source
MAD	Mean square error per period	Calculated
i	time period i	Counter
n	number of time periods	Calculated
F_i	Forecast at period i	Read from current_stream
D_i	Demand (actual or forecast) at period i	Read from current_stream

For MSE:

Figure G–9 Formula to Calculate MSE

$$\sigma_d = \sqrt{MSE}$$

$$MSE = \left(\frac{1}{n}\right) \sum_{i=1}^n (F_i - D_i)^2$$

Item	Description	Source
σ_d	Standard deviation per period	Calculated
MSE	Mean square error per period	Calculated
i	time period i	Counter
n	number of time periods	Calculated
F_i	Forecast at period i	Read from current_stream
D_i	Demand (actual or forecast) at period i	Read from current_stream

Poisson

For a Poisson distribution, the equation must be solved iteratively:

$SS = x' - \mu$, such that x' satisfies:

Figure G–10 Poisson Formula

$$\mu = \mu_d \mu_t$$

$$SL = \sum_{x=x'}^{\infty} \frac{e^{-\mu} \mu^x}{x!}$$

Item	Description	Source
SS	Safety Stock	Calculated

Item	Description	
SL	Service Level, expressed as a Probability (i.e., 95% Service Level would be expressed as 0.95)	Read from Supply Policy
μ	Mean demand during the lead time	Calculated
μ_d	Mean demand for a period	Calculated
μ_r	Mean lead time (in terms of periods)	Read from Supply Policy
x'	Reorder Point	Calculated

For example, given:

Mean demand = 2 units per day

Mean lead time = 3 days

Desired Service Level = 85%

Then:

Figure G-11 Example for Poisson Formula

$$\mu = \mu_d \mu_r = 1.5 \text{ units/day} + 3 \text{ days} = 4.5 \text{ units}$$

$$\text{SL} - 85\% = 0.85$$

So, find the next highest x that most closely satisfies:

Figure G-12 Formula that Calculates Highest Reorder Point

$$f(x) = 0.85 = \sum_0^x \frac{e^{-4.5} 4.5^x}{x!}$$

Solving, we find $f(6) = 0.8311$, $f(7) = 0.9134$, so we choose 7, therefore:

Figure G-13 Safety Stock Formula Example

$$SS = x' - \mu = 7 - 4.5 = 2.5 \rightarrow \text{round up to 3 units.}$$

Periods Forward

Periods forward calculates the sum of the specified number of periods forward from the given period. For instance, if the number of periods of supply were specified as four, then the safety stock for each period is the sum of demand for the next four periods.

Figure G–14 Periods Forward Formula

$$SS = \sum_{i=1}^n F_i \times \text{NumberPeriodsForward}$$

Item	Description	Source
SS	Safety Stock	Calculated
F_i	Forecast at period i	Read from current_ stream
n	Number of periods forward	Specified in SS job

Periods Back

"Periods back" is the average demand per period times the specified number of periods.

Figure G–15 Periods Back Formula

$$SS = \sum_{i=1}^n D_i \times \text{NumberPeriodsSupply}$$

Item	Description	Source
SS	Safety Stock	Calculated
D_i	Demand at period i	Read from current_ stream
n	Number of periods of supply	Specified in SS job
μ_d	Mean demand per period, for the given range	Calculated

Time - Series Calculation

Time-series calculations work similar to the above, but add the element of a rolling horizon. Consider the following example:

User selects: Time Series. Normal. Forecast Consumption, for forecast periods 1 through 10, with a 5-period rolling horizon. For period 1, use the above equations with a range of periods from 1-5 as the input. For period 2, use the above equations with a range of periods from 2-6 as the input, for period 3, use the above equations with a range of periods from 3-7 as input, etc.

For Time Series Period Forward calculations: For each period in the forecast range, the safety stock equals the sum of the forecasts for the next n periods, where n is the "Periods of Supply".

So, if the period of supply is 4 the safety stock for

- 1. period 1 is the sum of the forecasts for periods 1 through 4
 - 2. period 2 is the sum of the forecasts for periods 2 through 5
 - 3. period 3 is the sum of the forecasts for periods 3 through 6
- ...until you are out of the specified forecast range.

Safety Stock Constants

The following are safety stock constants defined for supply policies.

Method values from rp_ss_job_requests table */

Description	Constant Number
G_SS_NORMAL	0
G_SS_POISSON	1
G_SS_PER_FORWARD	2
G_SS_PER_BACK	3

Basis values from rp_ss_job_request table */

Description	Constant Number
G_SS_ACTUAL	0
G_SS_FORECAST	1
G_SS_MAD	2
G_SS_MSE	3

SS_type Values from rp_policy table */

Description	Constant Number
G_SS_FIXED	0
G_SS_TIME_SERIES	1

STC_TYPE Values in rp_streams table */

Description	Constant Number
G_RP_CONSUMP_FORE	0

Description	Constant Number
G_RP_CONSUMP_ACT	1
G_RP_INVENTORY	2
G_RP_EXPECTED_ ARRIVALS	3
G_RP_SAFETY_STOCK	4
G_RP_PROJECTED_INV	5
G_RP_RECEIPT_FC	6

Language Encoding for Files Generated

This appendix lists the locations where the language settings are configured.

Language Setting Locations

The following table shows which features can be configured for Language, and where to configure them.

Feature	Configured in...
Export Data using Export button on UI	Configuration - Language - File Character Set
Extracts Module	Oracle Retail VCC Extracts - Create screen
Integrator Extracts	Integrator Extractor Configuration
Exceptions Email Alert	1. Configuration - Language - Email body Character Set. 2. Configuration - Language - Email attachment Character Set.
Promotion Email Alert	1. Configuration - Language - Email body Character Set. 2. Configuration - Language - Email attachment Character Set.
Reports Email	1. Configuration - Language - Email body Character Set. 2. Configuration - Language - Email attachment Character Set.
Reports Download	Configuration - Language - File Character Set
Reports Extracts	Configuration - Language - File Character Set
Reports FTP	Configuration - Language - File Character Set
Integrator Loaders	Integrator Loader Configuration
Real Time Export	Not configurable. UTF-8 encoding will be used.

Data Stream Type Codes

This appendix lists the data stream type codes.

Data Stream Types

The following is a list of data stream type codes:

Table I-1 Stream Type Codes

Stream Code	Description
0	Price
2	Actual "Sales"
3	Store On-hand
4	Store+DC On-hand
5	Store Receipts
6	Store Shipments
7	Store Returns
8	Store Waste
9	Shrink (Units)
10	POS/Retail Sales (\$)
11	POS/Retail Sales (i)
12	POS/Retail Sales (£)
13	POS/Retail Sales (¥)
14	Lost Sales
15	Open-to-Buy
16	Store Open Orders
17	Sales Forecast
18	POS Forecast (\$)
19	POS Forecast (i)
20	POS Forecast (£)
21	POS Forecast (¥)
22	Store Receipt Fcst
23	Store Rainchecks

Table I-1 (Cont.) Stream Type Codes

Stream Code	Description
24	Locations Stocked
25	Locations Promoted
26	Locations Planned
27	DC Withdrawals
28	DC Inventory
29	DC Receipts
30	DC Receipt Fcst
31	DC Withdrawal Fcst
32	Expected Arrivals
33	Finished Goods Inv
34	Mfg Consumption
35	DC Shipments
36	Unloaded Quantity
37	Unavailable Stock
38	Quality Hold
39	Safety Stock Thresh
40	Raw Matl Inv (Units)
41	Mfg Consumption Fcst
42	Work in Process
43	Actual Shipments
44	Shipment Forecast
45	Scrap Quantity
46	Consignment Inv
47	RMA/RTV Inventory
48	Supplier Inv (Units)
49	Available to Promise
50	Planned Orders
51	Customer Allocation
52	Capacity
53	Mfg Org Fcst
54	Logistics Org Fcst
55	Sales Org Fcst
56	Finance Org Fcst
57	Marketing Org Fcst
58	Planning Org Fcst
59	Working Forecast
60	Consumer Inv (Units)

Table I-1 (Cont.) Stream Type Codes

Stream Code	Description
61	Consumer Inv (Days)
62	Items Processed
63	Items Rejected
64	Downtime
65	Collaboration Units
66	Gross Margin (%)
67	Category Rank
68	Category Share (%)
69	POS Forecast Error %
70	Receipt Fcst Error %
71	Fill Rate (%)
72	Sales Growth Rate %
73	Inventory Turns
74	RDC Availability (%)
75	Store In-Stock (%)
76	Store Out-of-Stock %
77	Shrink (%)
78	Retail DC Stockout %
79	Store Inv (Days)
80	Raw Mat Inv (Days)
81	Raw Mat Inv (Weeks)
82	On-Time Delivery (%)
83	Canceled Orders
84	Emergency Orders
85	Store Orders Placed
86	RDC Orders Placed
87	Unit Cost (Standard)
88	Unit Cost (Actual)
89	Shipments (\$)
90	DC Inventory (Days)
91	DC Inventory (Weeks)
92	Open Order Qty (\$)
93	Inventory at Cost
94	Store Inv (Weeks)
95	Store Inventory (\$)
96	GMROII (%)
97	GMROII Forecast (%)

Table I-1 (Cont.) Stream Type Codes

Stream Code	Description
98	Store Markdowns (\$)
99	Store Markdown %
100	Lead Time (Days-Avg)
101	Lift Factor
102	Inventory (Proj)
103	Capable to Promise
104	Aged Inventory
105	Shipment Fcst Calc
106	Average POS
107	Order Forecast
108	Cust Allocation Fcst
109	Cross-Docking Fcst
110	Forward Buy Fcst
111	Inventory Target
112	Inventory Target (Max)
113	Upside Percentage
114	Downside Percentage
115	Past Due Demand
116	Cumulative Quantity Received
117	Cumulative Quantity Consumed
118	Cumulative Demand
119	Upside Demand
120	Downside Demand
121	Channel Demand
122	Seasonal Demand
123	Committed Quantity
124	Base Unit Factor
125	Promo Unit Factor
126	Calculated Stream 1
127	Calculated Stream 2
128	Calculated Stream 3
129	Calculated Stream 4
130	Calculated Stream 5
131	Calculated Stream 6
132	Calculated Stream 7
133	Calculated Stream 8
134	Calculated Stream 9

Table I-1 (Cont.) Stream Type Codes

Stream Code	Description
135	Calculated Stream 10
136	DSD Receipt Fcst
137	Lost Sales %
138	Locations Stocked 2
139	Average POS 2
140	Calculated Stream 11
141	Calculated Stream 12
142	Calculated Stream 13
143	Calculated Stream 14
144	Calculated Stream 15
145	Calculated Stream 16
146	Calculated Stream 17
147	Calculated Stream 18
148	Calculated Stream 19
149	Calculated Stream 20
150	POS/Cost (\$)
151	Store Mrkdwn (Units)
152	Store Shpmnt (Cost)
153	Store Shpmnt (Ret)

Glossary

English Term	Function/Module	Definition
administrator (admin)	Role and Users	A type of user role that has access to all administrative functions except the Scheduler, creating a company, and purging data. An admin can only create price profiles and disaggregation profiles for her own company.
aggregate	General	The sum of items in a category (Local, Partner, Product, or Time Period) in a given context. For example, a user can aggregate all data in a product category as one number.
Alpha	Demand	The level parameter in Single Exponential Smoothing, Double Exponential Smoothing and Holt-Winters Exponential Smoothing.
Balance Stream	General	A data stream that measures counts of inventory, open orders or other quantities that are reported as an ending balance. Balance Streams can be aggregated across products and locations, but not time.
base forecast	General	The projection of future demand or supply, not including any special one-time events (such as promotions). Depending upon the situation, the base forecast may or may not include a seasonal profile (which tracks the typical variation of demand at different times of the year).
base price	General	A price of a product for a specific time period for a specific collaboration, not including any one-time changes (such as a promotion)
Beta	Demand	The trend parameter in Double Exponential Smoothing and Holt-Winters Exponential Smoothing.
buyer	General	A company that is operating in the role of receiving products from one or more trading partners.
collaboration	General	A trading relationship between a specific buyer location and seller location, over which information about products may be exchanged in Oracle Retail VCC.
Collaboration Units	General	A count of a company's utilization of Oracle Retail VCC, measured by the number of buyer location/seller location/product combinations (collaboration items) that are being collaborated upon.

English Term	Function/Module	Definition
Collapsed View	Exception	A display mode for the exception inbox where exceptions with the same value for certain fields are displayed as a single line item ("collapsed").
Commitment Report	Report	Report that provides a daily snapshot of yesterday's actual sales vs. one week ago, yesterday's actual orders vs. one week ago, the current forecast for today and a snapshot of how much inventory is in the store.
context	General	The combination of Local Location, Partner Location, Product, and Time Period that is used to view data streams.
Context Chooser	General	The Context Chooser is a pane in the main Oracle Retail VCC interface that allows users specify the data view. The specification identifies which data to display by context (I.e., local location, partner location, product) and data stream, as well as format (comparison type, UOM, expand by mode).
Cyclic Decay	Demand	The degree to which cyclical effects in the data decrease over time.
Daily Allocation	Disaggregation	A specification of the proportion of weekly data that is attributed to each daily time bucket during the week during the data disaggregation process.
Extract	General	A tool that allows the user to retrieve data stored the VCC Server's database as a delimited file. Data types included stream data as well as other types such as hierarchies, etc.
Data Stream	General	Time series supply chain data. The data can represent various metrics, such as forecast sales, actual inventory, goods in shipment, etc. In addition, the data can be provided on a daily, weekly, or monthly basis.
Data Stream Sub-Types	General	A data stream that is a component of a major data stream. For example, the "Actual POS" data stream has three sub-types, "Base POS," "Promotional POS," and "Total POS."
Data Stream Type	General	A configured group of fixed and modifiable attributes that define the way data in a VCC data stream can be viewed and manipulated.
Demand Policy	Demand	Business rules that specify collaboration-specific data relevant to the resupply calculation
disaggregation	Disaggregation	A method that allows the user to convert data entered at an aggregate (category) level into estimated values at a more detailed level.
Display Mode	General	Display options that are available for any given view of the data.
Distributed Exceptions Report	Report	Report that shows some or all existing system exceptions at and below a given context.
Event	General	1) An execution of a task (both VCC defined and system tasks) in the Scheduler. 2) A promotional event

English Term	Function/Module	Definition
Event Plan Report	Report	Report that provides detail of planned promotions by manufactures and retailers and the discrepancies between the promotions.
Event Sales Forecast By Ship-To Report	Report	Report that provides a quick summary of promotion sales forecast by week and retailer.
exception	Exception	An alert triggered by the deviation of a data stream from another data stream or from a constant threshold by more than a specified tolerance. Exceptions indicate misalignment of demand and/or supply.
exception criteria	Exception	User-defined rules that govern how data streams are compared, and when exceptions should be generated.
Exception Inbox	Exception	Summary view in which users review and manage exceptions
Exception Log Report	Report	Report that provides a summary for products that have promotions planned in the future.
Exception severity level	Exception	A level assigned to help prioritize exceptions.
Exception Summary Report	Report	Report that counts exceptions under a given context and groups at the folder level that is one folder above the leaf level.
Filter	General	A set of user-specified values that restrict which items appear in a list view, such as the exception inbox. The list item will only appear if it matches the filter specification.
Fixed Period Overlay	General	A period overlay that shows data streams summed for a specific period (Jan. 4, 2002 through Feb. 5, 2002, for example).
Forecast Accuracy Report	Report	Report that shows whether forecast accuracy has or has not improved over time at both leaf and aggregate levels.
Forecast Accuracy Summary By Product Type Report	Report	Report that tracks forecast accuracy trends
Forecast Error Report	Report	Report that shows whether forecast error has or has not improved over time at both leaf and aggregate levels.
forecast method	Demand	The model used to generate a statistical forecast.
Frozen Periods.	General	A period in the future in which data entry or editing is disallowed. Companies utilize a frozen period to prevent changes to a forecast in periods where changes would have no effect on delivery or execution of the plan. For example, if transportation time of a shipment is a week, the first future week of the forecast should be frozen, because goods covered by the forecast within that period may have already shipped.
Gamma	Demand	The seasonal parameter in Holt-Winters

English Term	Function/Module	Definition
Generational Offset	General	A offset that allows users to compare a current Data Stream with a previously saved generation of the same Data Stream.
Geneva Forecast Engine (Geneva)	Demand	A comprehensive library of more than 500 different combinations of data transformations and statistical methods.
group	General	A named set of data streams that can be displayed together in the grid or graph.
Group Exception	Exception	An exception generated from a Group Exception Criterion.
Group Exception Criteria	Exception	An exception criterion that is composed of more than one Individual exception criterion grouped together by a Boolean expression. Group criteria allow users to set up compound rules that more closely match their business needs.
Hierarchy	General	A tree-like taxonomy composed of leaf-nodes and categories. Categories can contain leaf-nodes and other categories. In VCC, there are four primary master data hierarchies: product, partner, location, and period.
Individual Exception	Exception	An exception generated from an Individual Exception Criterion
Individual Exception Criteria	Exception	A rule for triggering an exception, based upon the comparison of a data stream with another data stream or a constant threshold. Individual exception criteria can be used as part of a Group Criteria
Inventory Levels	Scorecard	The average in-stock quantities for the period specified
Inventory Turns/Period of Supply Report	Report	Report that shows how inventory turns have or have not improved over time at both leaf and aggregate levels for both the buyer and the seller.
Last Transaction Report	Report	Report that identifies those products that might be purged based on sales activity.
Leaf	General	A specific data object in the dimension of product, partner, location, or period hierarchy. Unlike categories (folders), leaves cannot have child objects.
Lift	Promotion	The impact of a promotion, expressed as the positive deviation from the base forecast
lift factor	Demand	Factor that indicates how each period compares to an "average" period.
Load	General	A transportation unit of capacity
Local	General	Local location of your organization/business, which can include specific stores, warehouses, distribution centers, factories, etc., or logical regions, tiers, or other location categories that contain many specific locations.
Local Current - Local Previous	General	Comparison of your current data with your previous data.

English Term	Function/Module	Definition
Local Current - Partner Current	General	Comparison of your current data with your partner's current data.
Local Part Number (LPN)	General	A company-specific identifier for a product, part or material.
location	General	A company's place of operation, which can include physical locations such as stores, as well as logical locations, such as regions. Used to specify Local and Partner.
Manager	Role and Users	A type of user role where in addition to all the privileges of the Planner role, she can create users, aggregates, and disaggregation profiles.
Master Data	General	Data that describes the characteristics of products, locations, companies, and periods that controls how Oracle Retail VCC processes data streams.
Mean Absolute Deviation (MAD)	Demand	A measure of the error between the forecast values and the actual values in the hold-out period
Mean Absolute Percent Error (MAPE)	Demand	A measure of the error between the forecast values and the actual values in the hold-out period - calculated as the average percentage error.
Measurement Stream	General	A data stream that measures key performance indicators or ratios that cannot be aggregated.
median	Demand	A specific type of demand policy filter that employs a median number.
minimum order quantity	Supply	The minimum number of items that can be ordered.
Modules	General	Related groups of screens and features that can be enabled or disabled in Oracle Retail VCC, based upon a company's license or usage preference.
Movement Stream	General	A data stream that measures a flow of material or value through a location during a period, which can be aggregated across products, locations, and periods.
Moving Period Decay	Demand	The degree to which the annual trend has held steady in recent periods.
No Sell Report	Report	Report that identifies products that never had any transactions for any data streams
order processing time	Supply	The Seller's required internal processing lead-time to get an order in-transit to the buyer.
Partner	General	Partner location of their organization/business, which can include specific stores, warehouses, distribution centers, factories, etc., or logical regions, tiers, or other location categories that contain many specific locations.
Partner Current - Partner Previous	General	Comparison of partner's current data with partner's previous data.
Performance Report	Report	Report that shows metrics in terms of product availability and product waste

English Term	Function/Module	Definition
period overlay	General	An aggregate time series. For example, a user can create a monthly overlay that will total all weekly data into a set of monthly totals. Period overlays are flexible; they can include time periods of varying lengths, and can be for a fixed timeframe, or on a rolling basis.
Periods supply	Supply	A measure of the number of periods of demand that could be supplied by the given inventory.
plan horizon	Supply	The number of days to perform supply planning.
Planner	Role and Users	A type of user role where she has read-and-write access to Oracle Retail VCC to create and edit data streams, and create promotional events. A planner has read-only access to exception criteria and metrics.
Point-of-Sales (POS)	General	Measurement of quantity or value of units sold to the consumer in stores.
Poisson distribution	Supply	A probability density function that models the number of outcomes obtained in a specified interval of time. Used to calculate safety stock for slow moving items.
Primary	General	The local value in a local-to-partner comparison, or the current value in a current-to-previous comparison.
promotion	Promotion	Stimulating demand by advertising, displaying, and/or reducing the price of a product.
promotional event	Promotion	A period in which a promotional advertisement, display, and/or price reduction is offered.
supply policy	Supply	Business rules that specify parameters to use in both supply and safety stock calculation.
Reviewer	Role and Users	A type of user role that has only read access to VCC
Rolling Period Overlay	General	A period overlay that shows data streams summed from the present period onwards (for example, the next 4 weeks are aggregated into a monthly number).
Root Mean Square Error (RMS)	Demand	A measure of the error between the forecast values and the actual values in the hold-out period - calculated as the square root of the average squared error.
safety stock	Supply	The minimum inventory level for a product that is required to maintain a specified service level.
safety stock calculator	Supply	A utility that calculates the required safety stock.
scenario planning	Supply	Interactive "what-if" supply planning of single collaboration items.
Scheduler	Scheduler	A Oracle Retail VCC facility that allows users to execute any predefined VCC tasks or any Windows or Unix command on a one-time or periodic basis.
Scorecard	Scorecard	A set of key performance measures, including goals and results achieved.

English Term	Function/Module	Definition
Seasonal forecast	General	A factor that describes the deviation of the forecast for a given period from the average across all periods, based upon period (seasonal) effects.
Seasonal Pre-Filter	Demand	A filter that smooths seasonal outliers from the input data stream before it is submitted to the forecasting process.
Secondary seller	General	The partner value in a local-to-partner comparison, or the previous value in a current-to-previous comparison.
service level	General	A company that is operating in the role of supplying products to one or more trading partners.
shipping/receiving calendar	General	The percent of time that sufficient inventory exists to meet demand.
shipping/receiving calendar	Supply	Specifies which days are valid for shipping or receiving.
Smoothing Pre-Filters	Demand	A median type filter that smooths outliers from the input data stream before submittal to the forecasting engine.
statistical forecast	Demand	A forecast of future values generated by fitting a statistical model to actual historical values.
Stream	General	Another name for a data stream.
Stream Data	General	The values in a data stream
stream item type	General	The identifier for a substream (component stream) in a data stream
stream set	Supply	Sets of streams that specifies which streams to use in demand, supply and safety stock calculations
Substreams	General	Another name for a data stream subtype
Super Admin	Role and Users	A user role that has access to all administrative functions.
supervisor	Role and Users	A user role that, in addition to all the privileges of the Planner role, can create exception criteria and metrics.
VCC Integrator	General	A facility in Oracle Retail VCC that maps, validates and loads data into a VCC database.
Task	Scheduler	A command executed by the Scheduler.
telescoping overlay	General	Similar to a rolling period overlay. This type of overlay automatically rounds up any extra time buckets in the overlay to get to the next size.
Threshold	Exception	A value, specified in an exception criterion, that is used as the point of comparison for determining whether an exception has occurred.
time bucket	General	A period of time in which quantities of data should be summed up. For example, if you are creating a period overlay for weekly data, then you specify a bucket size of 4 to total 4 weeks of data for each column that you are creating.
transit lead time	Supply	The travel time between the seller location and buyer location.

English Term	Function/Module	Definition
Trend Hold	Demand	The degree to which the periodic trend has held steady in recent periods.
trials	Demand	The number of times a statistical model is calculated to optimize the model's parameters.
unavailable stock	Supply	The number of inventory items that cannot be used but must be counted as part of the total.
Unit of Measure (UOM)	General	The scalar type used to measure quantities of the item (e.g., kilograms, meters, ""each,"" ""truck load,"" etc.)
Usage Report	General	A report of the current consumption of collaboration units that is visible in the Oracle Retail VCC usage monitor.
Deviation	Exception	The amount a source data stream varies from its comparison. The comparison could be another data stream or a fixed threshold.
Volatility	Scorecard	The percentage difference between the high values and low values for a selected stream within a period range collected for a context.

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