

Oracle® Retail Plan Pre-Season 2.5
User Guide

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Preface

Audience

This document is intended for users and administrators of the Oracle Retail Plan Pre-Season application.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at

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Related Documents

For more information, see the following documents in the Oracle Retail Plan Pre-Season 2.5 documentation set:

- *Oracle Retail Plan Pre-Season Installation Guide*
- *Oracle Retail Plan Pre-Season Configuration Guide*
- *Oracle Retail Plan Pre-Season Operations Guide*
- *Oracle Retail Plan Pre-Season Online Help*
- *Oracle Retail Plan Pre-Season Release Notes*

Conventions

The following text conventions are used in this document:

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

Getting Started

Welcome to Oracle Retail Plan, a web-based tool designed to help you create, forecast and manage merchandise planning easily and more effectively. The Oracle Retail Plan tool may be used to support the entire planning process from historical analysis to mock item planning, plan refinement and in-season tracking.

About Oracle Retail Plan:

The foundation of Oracle's Retail Plan solution is advanced forecasting and optimization analytics that drive better, faster decisions. Oracle Plan provides integrated Assortment and Item Planning, automating the flowcharting process and enabling merchants to tailor assortments to local demand. Additionally, Plan supports in-season planning and is integrated with Allocation Optimization to ensure that merchant's assortment strategy is effectively executed to the stores.

To maximize the analytic potential of the Plan application, Oracle Analytic Insights; including Optimized History, Optimized Size Profiles and Optimized Pre-Pack Configurations, will provide insight into missed historical opportunities in terms of sales and gross margin at all levels of the merchandise and location hierarchies. Furthermore, these analytics will provide predictive recommendations for how to maximize future performance through informing a range of strategic, tactical and operational decisions - from informing what the driving parameters for a given assortment should be with Optimized History to automatically executing on the assortment with optimized size profiles and pre-packs.

This user guide is designed to help you understand the Plan solution and how to make it work for you. This chapter includes the following topics:

- ["Checking Your Plan Browser Settings"](#) on page 1-1
- ["Checking Your Merchant Desktop Browser Settings"](#) on page 1-4
- ["Logging on to Plan"](#) on page 1-5
- ["Logging on to Merchant Desktop and Plan"](#) on page 1-7
- ["Changing Your Password"](#) on page 1-10
- ["Understanding the Plan User Interface"](#) on page 1-11
- ["Understanding the Merchant Desktop User Interface"](#) on page 1-13

Checking Your Plan Browser Settings

Plan is a web application that runs in the Microsoft® Internet Explorer web browser, version 6.0 or newer.

Important - In addition to the Internet Explorer web browser, your PC must be set up with Microsoft Excel 2000 or newer if you want to export Plan data or access Plan standard reports.

Before you attempt to access Plan, check your browser settings for the following:

Note - If you are using the Merchant Desktop feature, there are additional browser setting you must check as explained in "[Checking Your Merchant Desktop Browser Settings](#)" on page 1-4.

- Security settings for Plan URL - Add the Plan URL to the appropriate zone (Local intranet or Trusted sites) to ensure that the Plan application will use the security settings for this zone.

Important: Do not use the Internet zone to configure browser settings for Plan. Use only the Local intranet zone or the Trusted sites zone, as explained in the following table.

Table 1-1

If	Configure browser settings for
Plan is installed and hosted by your company	Local intranet zone Note: The default security settings for the Local intranet zone are not sufficient. Therefore, make sure that you adjust the security settings as explained in the following procedure.
Plan is installed and hosted by Oracle	Trusted sites zone When Oracle hosts Plan for you, Internet security settings apply by default, and these settings are not sufficient for Plan. Therefore, add the Plan URL to the list of Trusted sites. Even though the default security settings for Trusted sites may be sufficient for Plan, it is highly recommended that you check them as explained in the following procedure.

- Scripting - Typically, the Internet Explorer default settings are sufficient. However, it is a good idea to check scripting options for the Plan-specific zone (Local intranet or Trusted sites) as outlined in the following procedure. Scripting is required for most Plan functions, including reporting.

To configure Internet Explorer for Plan:

1. Start Internet Explorer as you normally do.
2. From the Tools menu, select Internet Options.
3. On the Internet Options dialog box, click the Security tab
4. On the Security tab, click Local intranet, or, if you have been instructed to do so by the administrator, Trusted sites, and then click the Sites button.

Important: Do not select Internet unless you have been instructed to do so by the administrator. In most cases, the Plan application will be available on your company's intranet or on a Oracle trusted site.

If you selected Local intranet, go to step 5. If you selected Trusted sites, go to step 6. (The Local Intranet dialog box in step 5 does not appear when you select Trusted sites.)

5. On the Local intranet dialog box, click the Advanced button (as in the following example).

6. On the resulting Local intranet or Trusted sites dialog box, add the Plan URL if it is not already listed.

To do so, type the Plan URL in the Add this Web site to the zone text box (similar to the following example) and click Add. When the URL appears in the Web sites list, click OK.

7. If the Local Intranet dialog box from step 5 is still open, click OK to close it.
8. On the Internet Options dialog box, Security tab, select Local intranet or Trusted sites and then click the Custom Level button.
9. On the Security Settings dialog box, make sure the following commands are set to Prompt or Enable, and then click OK.

The Prompt setting provides a message box each time Internet Explorer encounters the specified command (e.g., Download signed ActiveX controls).

The Enable setting bypasses the message box and instead performs the specified command without notifying you.

In general, you could select Prompt for the download options because the downloads typically occur one time. For the running and scripting options, however, you could select Enable because those commands occur frequently. (If you would set these options to Prompt, you might have to respond to a message box several times in one Plan session.)

- Download signed ActiveX controls
- Run ActiveX controls and plug-ins
- Run ActiveX controls marked safe for scripting
- File download
- Active scripting
- Initialize and script ActiveX controls not marked as safe - A Microsoft ActiveX® control is required each time you export to Excel. While this ActiveX control is signed, it is not marked as safe (meaning that it could potentially be used to do unsafe things). If you set this option to Prompt, you will be prompted each time you select the Plan Export action.

The following example uses the Prompt setting for the Initialize and script ActiveX controls not marked as safe command.

The following example shows the prompt that appears when there is a request from an application to use an ActiveX control that is not marked as safe.

10. On the Internet Options dialog box, click OK to return to the browser.

What to Do Next

If you are using the Merchant Desktop feature, see "[Checking Your Merchant Desktop Browser Settings](#)" on page 1-4.

See "[Logging on to Plan](#)" on page 1-5.

Cache Settings

In most cases, you do not need to check your cache settings. The Internet Explorer default cache setting is Automatic, which is sufficient for Plan. The Automatic setting ensures that Internet Explorer checks for updates to the Plan software. If you do want to check your cache settings, use the following procedure.

To check Internet Explorer cache settings:

1. From the Tools menu, select Internet Options.
2. On the Internet Options dialog box, General tab, Temporary Internet Files section, click the Settings button.
3. On the Settings dialog box, select Automatically if it is not a selected already, and click OK

Note: You can also select Every visit to page.

4. On the Internet Options dialog box, click OK to return to the browser.

Checking Your Merchant Desktop Browser Settings

The following sections pertain to the optional Merchant Desktop feature. If your company is not using Merchant Desktop, these sections do not apply to you. I

Important: The optimum resolution for viewing Merchant Desktop screens is 1280 x 1024 or 1280 x 960. If you are using a laptop or other device that does not permit resolution that high, however, you may need to set the resolution to something like 1024 x 768. The optimum number of colors is True Color (32 bit).

In addition, your computer must meet the following requirements to use Merchant Desktop:

- Internet Explorer 6.0 or newer
- Java™ Runtime Environment (JRE) 1.4.2 or newer
- Java scripting enabled
- Cookies enabled

Because you will be accessing Plan from the same browser, make sure that you also check the browser setting for Plan as explained in "[Checking Your Plan Browser Settings](#)" on page 1-1.

Java Runtime Environment (JRE)

If you are not using the enhanced reporting feature, which provides the MicroStrategy Web Universal application through Merchant Desktop, please skip this section.

The Java 2 Standard Edition JRE 1.4.2 or higher is required for viewing the hierarchical trees (similar to the tree in Windows explorer) from which you select reports, graphs, and levels of the merchandise and location hierarchies, and time periods.

If you don't have the JRE installed, you may be prompted to install it when you first access a Merchant Desktop reporting component. Follow the steps below to download (if necessary) and install JRE.

To download JRE 1.4.2:

1. Start Internet Explorer and enter the following URL:
`http://java.sun.com/j2se/1.4.2/download.html`
2. In the J2SE v 1.4.2_nn JRE section, click the Download J2SE JRE link.
3. On the download screen, click the download icon for one of the Windows platform files. (Both files install the correct JRE.)

4. Answer the prompts as you normally do when downloading files from the Internet.

To install JRE 1.4.2:

1. If Merchant Desktop did not prompt you to download and install the JRE:
Double-click the file you downloaded in the previous procedure.
j2re-1_4_2_04-windows-i586-p.exe (or newer version if available)
or
j2sdk-1_4_2_04-windows-i586-p-iftw.exe (or newer version if available)
2. Respond to each of the installation wizard screens.
For the set up type, accept the default, which is Typical.
3. After the install is complete, restart your computer.
4. Start Internet Explorer and select Tools menu > Internet Options.
5. On the Internet Options dialog box, click the Advanced tab and scroll down to the Java (Sun) section.
6. Verify that Use Java 2 v1.4.2_nn... option is selected.
When your computer has successfully restarted, and the Java option is selected, see "[Logging on to Merchant Desktop and Plan](#)" on page 1-7.

Logging on to Plan

If you are using Plan without the Merchant Desktop feature, follow the instructions in this section. If you are using Merchant Desktop with Plan, follow the log on instructions in "[Logging on to Merchant Desktop and Plan](#)" on page 1-7.

Before you access Plan for the first time, do the following:

- Check your settings for Microsoft Internet Explorer. For details, see "[Checking Your Plan Browser Settings](#)" on page 1-1.
- Obtain the following from the Plan administrator:
The Plan URL (uniform resource locator); the URL is sometimes referred to as the "web address." This is what you will enter from your Internet browser to access Plan. The URL will look similar to the following:
`https://yourcompanyname.p4p.Oracle.com`
- A username and password. You will enter your username and password on the Plan login screen.

To access Plan

1. Start Internet Explorer as you normally do.
2. In the Address field, enter the Plan URL for your company and press Enter.

If you have not downloaded the Microsoft Common Dialog control yet, a prompt appears asking you to do so. Otherwise, the Plan login screen appears.

To avoid further prompts of this security warning, click the Always trust content from Microsoft Corporation check box and click the Yes button.

The Microsoft Common Dialog control is downloaded to your computer and appears in the Downloaded Program Files directory. After you click Yes, the Plan login screen appears.

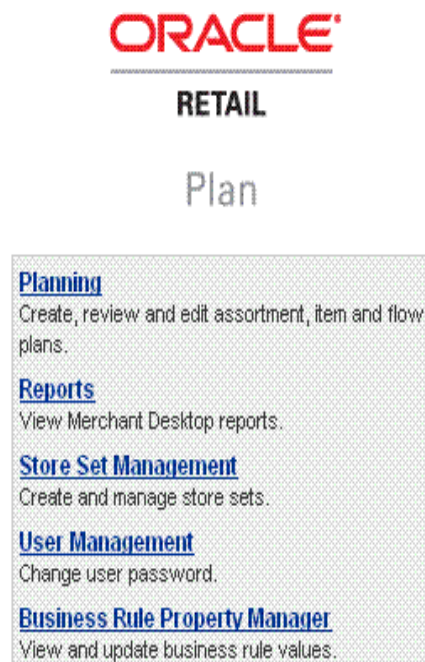
3. On the Plan login screen, enter your username and password in the appropriate fields and then click the Login button.

Your username and password are case-sensitive. If you are unable to log in, check your keyboard to make sure that the Caps Lock key is not selected.

If you forget your password, contact the Plan administrator to get a new password.

When you successfully enter your username and password, the Plan Main Menu appears as in Figure 1-1.

Figure 1-1



What to Do Next

For information on how to use the Plan user interface, see "[Understanding the Plan User Interface](#)" on page 1-11. Otherwise, select any of the following links from the Main Menu, depending on what you want to accomplish:

- Planning - Create, review, and edit Assortment, Item, and Flow plans.
- Reports - View Merchant Desktop Reports. See [Chapter 11, "Reports"](#).
- Store Set Management - Create and Manage Store Sets. See [Chapter 4, "Using the Store Set Management Utility"](#).
- User Management - Change User Password. See "[Changing Your Password](#)" on page 1-10.
- Business Rule Property Manager - View and Update Business Rule Settings. See [Chapter 13, "Managing Business Rules"](#).

- Administration - View and Refresh application configuration settings. Updates are transient within the application server, and are not persisted. See your System Administrator for assistance.

You can return to the Main Menu by clicking the Main Menu link in the upper-right of most Plan screens.

Understanding Time-outs

Important: After you are logged on, Plan will time out after one hour of inactivity on the server. This means that although you may be working with worksheets, the time-out message could still appear because the server is inactive when you are manipulating worksheets. Therefore, it is recommended that you save your work regularly.

If your session does time out, a message appears warning you the session is going to time out.

When this occurs, click OK. The Login screen appears and you must enter your username and password again.

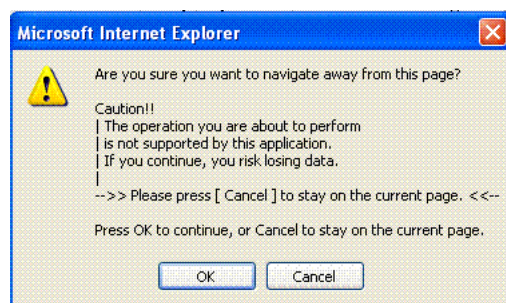
Additionally, the Business Rules Property Manager utility, Store Set utility and Administration utility (not available to most users) have separate time-outs. Thus, if you access either of these utilities and then leave them inactive, similar time-out messages will appear.

Understanding Navigation

While you use Plan, always use the Plan buttons, menus, and links to navigate from screen to screen. For example, when you are finished with a Worklist and want to return to the Plan Library screen, click the Done button rather than clicking the X or the Back button in the upper-right corner of the Internet Explorer window.

If you do click the X or Back button, the following warning appears.

Figure 1–2



Click Cancel on this dialog box and then navigate from the Plan screen using the Plan buttons or links.

Logging on to Merchant Desktop and Plan

The following sections pertain to the optional Merchant Desktop feature. If your company is not using Merchant Desktop, these sections do not apply to you.

Before you access Merchant Desktop or Plan for the first time, make sure you have checked your browser settings as explained in the following sections:

- ["Checking Your Plan Browser Settings"](#) on page 1-1.
- ["Checking Your Merchant Desktop Browser Settings"](#) on page 1-4.

To log on to Merchant Desktop and Plan

1. Start Internet Explorer as you normally do.

Note: Do not open a new window for Merchant Desktop via File > New Window. Only one Merchant Desktop user should be logged on a computer at a time. Otherwise, unpredictable results can occur.

2. In the Address field, enter the URL for your company and press Enter.

If you have not downloaded the Microsoft Common Dialog control yet, a prompt appears asking you to do so. Otherwise, the Plan login screen appears.

To avoid further prompts of this security warning, click the Always trust content from Microsoft Corporation check box and click the Yes button.

The Microsoft Common Dialog control is downloaded to your computer and appears in the Downloaded Program Files directory. After you click Yes, the Plan login screen appears.

3. On the login screen, enter your username and password in the appropriate fields and then click the Login button.

Your username and password are case-sensitive. If you are unable to log in, check your keyboard to make sure that the Caps Lock key is not selected.

When you successfully enter your username and password, Merchant Desktop appears with the view (default screen and horizontal row of available screens) that the administrator has assigned to you. (The view and administrative rights assigned to your login name determine what is displayed.)

If the administrator has not yet assigned a view to you, the Unassigned View Screen appears with a message to contact the administrator.

In most cases, your assigned view will be customized for your company and possibly for your department.

4. If you also want to access Plan, scan your Merchant Desktop screens to locate the Oracle component window.
5. On the Oracle products component window (which may be named differently at your site), click the Plan link.

The Plan Main Menu appears. When you log on to the Merchant Desktop, your username and password are automatically verified against the Oracle products at your site; therefore, you do not have to log on to Plan separately.

To exit Plan and return to Merchant Desktop, click the Close link in the upper-right of any Plan screen.

What to Do Next

For information on how to use Merchant Desktop, see ["Understanding the Merchant Desktop User Interface"](#) on page 1-13. In addition:

- To customize your view of Merchant Desktop, see [Chapter 12, "Personalizing Merchant Desktop"](#).
- To access enhanced reports, see [Chapter 11, "Reports"](#).

For information on how to use Plan, see "[Understanding the Plan User Interface](#)" on page 1-11. Otherwise, major Plan concepts are explained in the following chapters in this Guide:

- [Chapter 6, "Setting Up Items"](#)
- [Chapter 7, "Buy Parameters"](#)
- [Chapter 9, "Pack Optimization"](#)
- [Chapter 10, "Submitting Items"](#)

Getting Help

While you are in the Merchant Desktop user interface, you can access help at any time by clicking the help icon or by clicking the Help link in the upper-right of the Merchant Desktop screen.

Likewise, to access Plan help, click the Help link in the upper-right of any Plan screen.

Instead of a Logout link, the Plan screen displays a Close link.

Click Close to exit Plan and return to Merchant Desktop.

Understanding Navigation

In general, use the Merchant Desktop screen tabs to navigate from screen to screen instead of using the browser's back and forward buttons. No error message appears if you attempt to do so, but it is good practice to always use the Merchant Desktop tabs, links, and buttons instead of those provided by the browser.

For Plan, always use the Plan buttons, menus, and links to navigate from screen to screen. For example, when you are finished with a worksheet and want to return to the Worksheet Summaries screen, click the Done button rather than clicking the X in the upper-right corner of the Internet Explorer window. If you do click the X, the following warning appears.

Figure 1-3



When this occurs, simply click Cancel and then navigate via the Plan user interface.

Understanding Time-outs

Merchant Desktop and Plan have independent time-outs. Thus, if you work only in Plan for a long time, a time-out message for Merchant Desktop may appear. Likewise, if Plan is open and you work in Merchant Desktop for a long time, a time-out message for Plan may appear.

Merchant Desktop Time-outs

Important: After you are logged on, Merchant Desktop will time out after approximately 20 minutes of inactivity. This is independent of any Plan activity. Therefore, it is recommended that you save your work regularly.

A message appears to warn you five minutes before the time-out occurs, giving you the opportunity to save your work.

When this message appears, click OK.

- If your session has not timed out yet, you can continue working.
- If your session has timed out, the login screen will appear when you first attempt to navigate or perform another action on the screen.

Plan and Related Time-outs

Important: After you are logged on, Plan will time out after 20 minutes of server inactivity. Thus, although you may be working with items, the time-out message could still appear because the server is inactive when you are performing various tasks. Therefore, it is recommended that you save your work regularly.

A message appears five minutes before the time-out occurs, giving you the opportunity to save your work.

If your session does time out, you will receive a message notifying you the session has timed out.

When this message appears, click OK.

The Login screen appears and you must enter your username and password again.

Additionally, the Business Rules Property Manager utility and the User Management utility (not available to most users) have separate time-outs. Thus, if you access either of these utilities from Plan and then leave them inactive, similar time-out messages will appear.

Changing Your Password

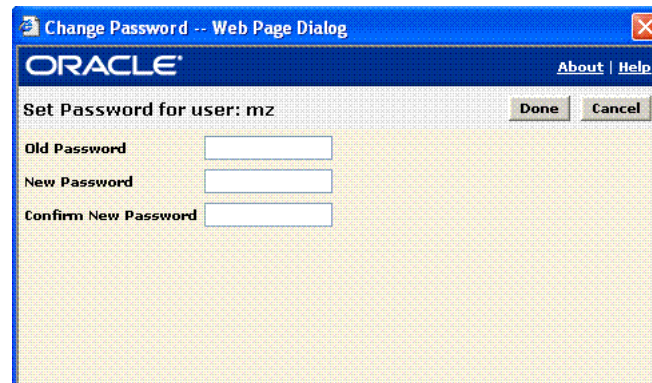
After you log in to Plan for the first time, it is a good idea to change your password from the one given to you by the administrator.

Note: If you forget your password, contact your system administrator to get a new password.

To change your password:

1. From the Main Menu, click the User Management hyperlink.

The following Change Password dialog screen appears, as in Figure 1-4.

Figure 1–4

2. Navigate to the Old Password field.

Enter your current password in the field.

Important: All passwords are case-sensitive. Make sure that the Caps Lock key is not selected.

3. In the New Password field, enter a new password.

You may use any combination of letters, numbers, and symbols, up to 50 characters.

4. In the Confirm New Password field, retype the new password.

5. Click the Done button.

If the new password does not match the confirmation password, an error message appears. Click OK on the error message dialog box and complete the New Password and Confirm New Password text boxes again.

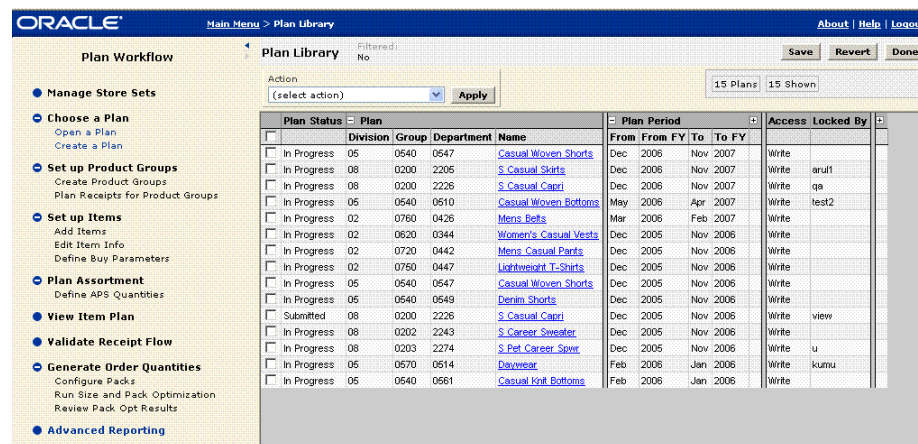
Otherwise, the dialog box closes and the above screen appears. There is no confirmation message.

Your password is changed to the new password you entered. You must use this password the next time you want to log into Plan.

Understanding the Plan User Interface

The following illustration shows features common to most Plan screens.

Note: Although your Plan screens will have the same features, the column names and metrics are typically customized for each site. Therefore, your screens may display column headings and metrics that do not appear in the screen captures.

Figure 1–5 Plan User Interface**Table 1–2 Plan User Interface Descriptions**

Screen area	Description
Plan Workflow Bar	This area to the left of most planning screens is an optional navigational tool. Close the Workflow bar by selecting the left arrow in the upper right corner of the Workflow Bar.
Main Screen Area	<p>Located to the right of the Workflow Bar. In this case, the Plan Library screen. Most Main screens include the following sections:</p> <p>Title Section - includes the gray bar across the top of the screen.</p> <p>Action Section - includes an Action button and other task related buttons.</p> <p>Grid Section - includes columns and rows. Usually columns may be expanded or collapsed</p>
General Links	<p>Located at the top of a main screen and may include some or all of the following links:</p> <p>About - Shows the version number, build number, date, time, and status of Plan.</p> <p>Help - Opens a browser that displays the online help system. When you click the Help link, a File Download dialog box may appear, asking if you would like to open the file or save it to your computer. It is recommended that you click Open to use the help system from its current location.</p> <p>Logout - Click this link to end your Plan session.</p>
Screen name	All screens are referred to by a screen name, usually located in the upper left corner of the screen.
Command buttons	The names of the buttons vary slightly from screen to screen, but in general most screens provide a Save button and a Done button. It is important to regularly save your changes, especially if a time out message appears.
Hyperlinks	<p>Navigate the Workflow Bar or most screens using hyperlinks. Hyperlinks take you to other screens within the Plan application.</p> <p>Most hyperlinks are colored dark blue and are underlined for emphasis.</p>

Table 1–2 (Cont.) Plan User Interface Descriptions

Screen area	Description
Action list	<p>An Action list contains actions you may perform on the current screen. Some actions require that you select one or more items first, and other actions apply to all of the data on the screen.</p> <p>After you select an action, click the Apply button.</p>
Tabs	<p>From some screens you may perform additional actions using tabs to selected the task.</p> <p>Tabs may be found in the Customize Table section of the Action drop-down lists, if available.</p>
Scroll Bar	Use the Scroll Bar located at the bottom and sides of the most screens. This will expand the view of information on the screen.
Summary metrics and status	These are customized to reflect the metrics that are most important to your company.

Understanding the Merchant Desktop User Interface

The following sections pertain to the optional Merchant Desktop feature. If your company is not using Merchant Desktop, these sections do not apply to you.

Your Merchant Desktop may display additional names and metrics that do not appear in the screen captures in this help guide.

Note: The pencil buttons for personalizing the view, screens, or components, appear only if the administrator has given your user account those permissions.

Table 1–3 Merchant desktop values

Feature	Description
View	<p>The row of screen tabs from which you can access each screen</p> <p>Click the pencil button at the end of the row to display the View Personalization screen, from which you can change the names and order of the screens and add additional screens.</p>
Screen	<p>For the selected screen tab, the collection of the individual component windows</p> <p>Click the screen name on each tab to display that screen.</p> <p>Click the pencil button next to the screen name to display Screen Personalization, where you can change the screen name and position and types of components.</p>
Component	<p>Within a screen, each individual window, typically with a border and title bar. However, component windows can be customized to hide the title bar.</p> <p>If available, click the pencil button in the title bar of each component to display the Component Personalization screen, where you can change the title bar name and modify component contents and display.</p>

Table 1–3 (Cont.) Merchant desktop values

Feature	Description
Title bar	<p>For each component, the text that identifies the component and the personalize, help, minimize, and maximize buttons.</p> <p>Note: Title bars may not be available depending on how the administrator has set up Merchant Desktop.</p>
Component title bar buttons	<ul style="list-style-type: none"> - Pencil button that displays the component personalization screen where you can change component contents or component parameters such as show /hide title bar. If this button does not appear, the administrator has disabled that feature. - Help button that displays help for that component - Minimize button that hides the component contents (not the title bar). The minimize function is intended for you to temporarily hide a component. Therefore, the component is minimized only until you click another screen. If you do not want a component to appear at all, remove it via Screen Personalization or ask the administrator to remove it for you. - Maximize button that expands the component to fill the screen. The maximize function is intended for you to temporarily expand a component for easier viewing. Therefore, the component is maximized only until you click another screen. If you want the component to appear on its own screen so that is always enlarged, ask the administrator to add this screen for you. - Restore button that returns the component to its original state after it has been minimized or maximized.
View scroll arrows (grayed out in the picture above)	<p>From left to right, the scroll arrows display the tabs as follows - the first tab in the series, the next tab to the left in the series, the next tab to the right in the series, and the last tab in the series.</p> <p>Gray indicates that the arrow is disabled because there are no tabs to display in that direction.</p> <p>The number of tabs displayed at one time depends on the length of each tab name, the amount of space available on the screen, and the screen resolution. When there are more tabs than can fit in a view, you must use the scroll arrows to display the other tabs.</p> <ul style="list-style-type: none"> ■ When scrolling is in effect, the position of the selected tab is not static - as you click the right arrow to display the next tab in the series, the selected tab moves one position to the left. Thus, it is possible for the selected tab to scroll out of sight even though the contents of that tab (the corresponding screen) remains visible. ■ When scrolling is not in effect, all tabs are visible at all times.
General links (not pictured above)	<p>About - Shows the version number, build number, date, time, and status of Merchant Desktop.</p> <p>Help - Opens a browser window that displays the online help system.</p> <p>Logout - Ends your Merchant Desktop session and displays the login screen.</p>

Using the Workflow Bar and Plan Library

The Plan Workflow, also called the Plan Workflow Bar, is an optional, navigational aid that may display on almost any screen within the planning process of the application. The sequence of screens listed within the Workflow Bar display a typical planning process that may be followed when using the application.

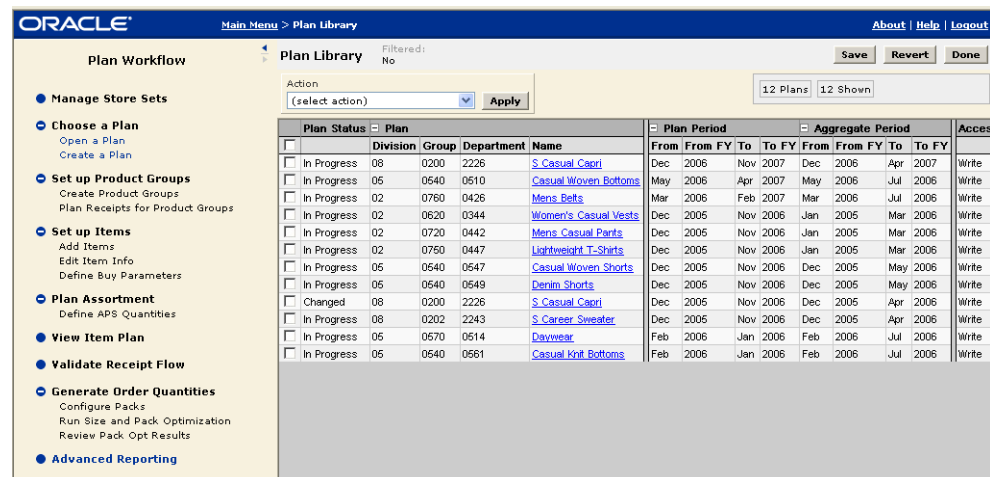
This chapter section contains the following topics:

- ["Understanding the Workflow Bar and Library Screen"](#) on page 2-1
- ["Using the Plan Workflow Bar Hyperlinks"](#) on page 2-3
- ["Identifying the Plan Library Screen Layout"](#) on page 2-5
- ["Create a Plan from the Plan Library"](#) on page 2-8
- ["Delete a Plan from the Plan Library"](#) on page 2-8
- ["Publish Selected Plans to RDM"](#) on page 2-8
- ["Customize Table"](#) on page 2-9
- ["Print or Export"](#) on page 2-11

Understanding the Workflow Bar and Library Screen

The Plan Workflow Bar is an optional navigational aid, when selected may appear automatically on the left side of any planning screen. When you access the Planning section of the application, the first screen visible is the Plan Library screen.

Click the expand button, located in the upper left corner of the Plan Library screen. The Workflow Bar will appear and share the left side of the Library screen.

Figure 2–1 The Workflow Bar and Library Screen

You may collapse (hide) the Workflow Bar by clicking on the arrows located in the top right of the bar.

The Workflow Bar lists a sequence of available screens arranged in such a way as to mimic a typical planning process within the application. You may navigate using the hyperlinks within the Workflow Bar, or using the Plan Library screen, go directly to a plan and navigate screen by screen to perform related tasks.

Use the Plan Workflow Bar to:

- visualize, from beginning to end, all screens used when navigating through an example planning process
- click on an available hyperlink to access screens, perform tasks and actions
- quickly navigate to planning screens within the application

The purpose of the Plan Library screen is to allow users to create, delete and access plans. As the name of the screen implies, this is your first point of access to the library of plans. All plans for which you have access to edit or view will be listed within the Plan Library screen.

Use the Plan Library screen (or navigate using the Workflow Bar) to:

- access plans listed in the library
- create new plans or delete plans
- access the Plan Worklist screen

Plan level security is configured by department within the administration section of the application. See your plan administrator if you have questions about your level of access within the Plan Library screen.

Accessing the Workflow Bar and Plan Library

To access the Workflow Bar and Plan Library screen:

1. Log into Plan using your user id and password.
2. From the Main Menu, select the Planning option
3. The Plan Library screen will appear.

Click the expand arrow in the upper left of the screen to access the Workflow Bar. When expanded the Workflow Bar will appear sharing the left side of the Plan Library screen.

Note: The Plan Workflow Bar may be expanded or collapsed. To do this:

In the upper left corner of the Plan Library screen (or any planning screen), locate a small arrow pointing right/left.

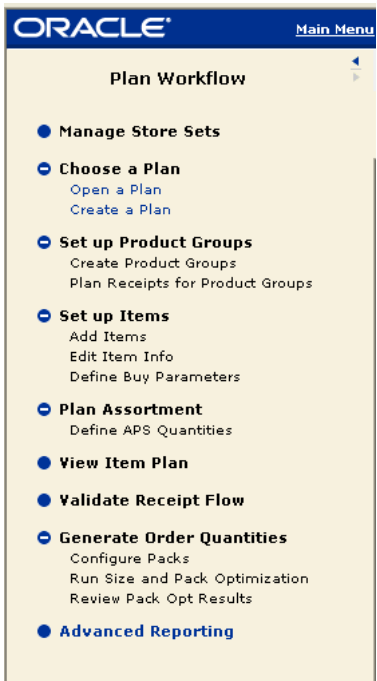
Click the right arrow to display the Workflow Bar.

Click the left arrow to hide the Workflow Bar.

Using the Plan Workflow Bar Hyperlinks

The Plan Workflow Bar will display from top to bottom on the far left side of almost any screen within the Plan application. It is clearly identified by a light color background with an expandable list of screen topics in dark type. If you display the Workflow Bar from a screen that permits access to additional screens, then those screen topics will be available hyperlinks within the Bar. Hyperlinks are identified in dark blue colored text. Single click on the hyperlink text to access the screen. There may be multiple hyperlinks listed, depending from which screen you choose to display the Workflow Bar.

Figure 2–2 The Plan Workflow Bar



The Plan Workflow Bar lists the planning screens available within the application. Depending on the screen the Workflow Bar is sharing, different hyperlinks will be available. The following table identifies all of the screen titles listed in the Workflow Bar and a brief description of each:

Table 2–1 Plan Workflow Bar Hyperlinks

Hyperlink Name	Description
Manage Store Sets	<p>The Store Set Library screen appears. Use this screen to create new store sets, copy sets, rename existing sets, merge and add other users' sets.</p> <p>To learn how to Manage Store Groups, see Chapter 4, "Using the Store Set Management Utility".</p>
Choose a Plan	<p>Select an existing plan and go to the Plan Library.</p> <p>For detailed information on the Plan Library, see "Understanding the Workflow Bar and Library Screen" on page 2-1.</p>
Set Up Product Groups	<p>A group of merchandise may have a large budget and an extensive list of items. In order to more easily manage these items:</p> <p>Assign items to each group and make these groups available to plans.</p> <p>Create Product Groups based on product attributes (create product group screen).</p> <p>Spread/allocate percentages of your budget to particular groups and/or hold budget in reserve for use later in the planning period.</p> <p>For detailed information on Plan Setup actions, see Chapter 5, "Using the Plan Setup Section".</p>
Set Up Items	<p>The Worklist screen allows you to perform all actions needed to successfully set up items to be used optimally within the Plan application. Add and Edit items and their associated details. Define buy parameters and related actions.</p> <p>For more information on how to Set Up Items, see Chapter 6, "Setting Up Items".</p>
Plan Assortment	<p>The Assortment View displays all the items contained in your plan with data on planned receipts by subset/store grade. Information may be viewed at the item or color level and you can choose to view data by particular subclasses and subsets. This is the area in which you can manually define and edit receipt quantities for the AP data segment.</p> <p>To learn about the Assortment View, see Chapter 8, "Using Plan Review".</p>
View Item Plan	<p>The Item View displays sales, receipts, inventory, and detailed metrics by week for a particular item, color, or group of items, such as class or subclass.</p> <p>For detailed information on the Item View, see "Understanding Item View" on page 8-12.</p>
Validate Receipt Flow	<p>The Flow View shows the receipt flow plan for all items in the plan by week. Compare quantities planned for the data segments and compare them to financial planning constraints set for the class and subclass by month.</p> <p>To understand the Flow View, see "Understanding Flow view" on page 8-17.</p>
Generate order Quantities	<p>From this link you are able to:</p> <p>Configure packs, run pack optimization and review pack optimization results.</p> <p>For detailed instructions and information on Generating Order Quantities, see Chapter 9, "Pack Optimization".</p>

Table 2–1 (Cont.) Plan Workflow Bar Hyperlinks

Hyperlink Name	Description
Advanced Reporting	These are the reports available through the Merchant Desktop. See Chapter 11, "Reports" .

Identifying the Plan Library Screen Layout

Figure 2–3 The Plan Library Screen

The screenshot shows the Oracle Plan Library screen. At the top, there's a navigation bar with 'Main Menu > Plan Library' and links for 'About', 'Help', and 'Logout'. Below the navigation bar, there's a 'Plan Library' section with a 'Filtered: No' indicator and buttons for 'Save', 'Revert', and 'Done'. An 'Action' dropdown menu is set to '(select action)' with an 'Apply' button. To the right, it shows '12 Plans' and '12 Shown'. The main part of the screen is a table with columns: Plan Status, Plan (Division, Group, Department, Name), Plan Period (From, From FY, To, To FY), Aggregate Period (From, From FY, To, To FY), Access, Locked By, and Plan Updater (Auto-Update, Last Updated). The table lists 12 plans, each with a checkbox, status, and various details.

The Plan Library screen is organized into the following three sections:

1. **Title Section** - lists informational fields and screen action buttons.
2. **Action Section** - an action drop down field lists available actions that may be taken while accessing the Plan Library screen.
3. **Plan Library Grid** - the columns on the Plan Library grid provide information about each of the plans listed.

1. Title Section:

There are three informational fields listed within the Title Section of the Plan Library screen:

Figure 2–4 Title Section of the Plan Library Screen

This screenshot shows the top portion of the Oracle Plan Library screen, focusing on the title section. It includes the Oracle logo, the navigation bar 'Main Menu > Plan Library', and links for 'About', 'Help', and 'Logout'. Below this, the 'Plan Library' header is visible, showing 'Filtered: No' and buttons for 'Save', 'Revert', and 'Done'. The 'Action' dropdown is also visible, set to '(select action)' with an 'Apply' button.

- Screen Title: Plan Library
- Filtered: Identifies with a Yes or No if a Filter has been applied.

You may apply filters from the Action drop-down field.

To do this:

Select the Customize Table option from the drop-down list. From the pop-up screen, select the Filter Tab. For details on setting and deleting filters see: ["Customize Table"](#) on page 2-9 of this user guide.

- # Plan # Shown: Located below the three action buttons and report the following metrics about the plans listed on the Plan Library screen:

The first field (# Plans) lists the number of plans within the Plan application.

The second field (# Shown) lists the number of plans displayed on the Plan Library screen.

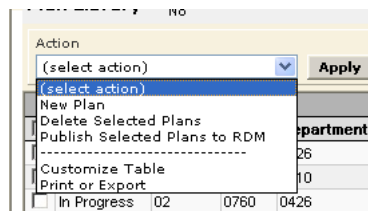
Also within the Title Section of the Plan Library screen are three buttons. These buttons allow for the following actions to be applied to the whole Plan Library screen.

- Save: Saves any changes made from the Plan Library screen.
- Revert: If you have made changes to the Plan Library screen, before saving them, you can use the Revert button to ignore the changes made and refresh the screen to the same data before making changes.
- Done: Allows you to exit out of the screen without saving any changes.

2. Action Section:

The Action drop-down field, located directly below the screen title, works in conjunction with plans listed within the Plan Library grid. Select one or more plans listed within the grid, choose an action from the list of available actions from the Action drop-down field, then click the Apply button. Whatever action selected will be applied to the plan(s) selected.

Figure 2–5 Action Drop-Down Field



The following is a list of actions available from the Action drop-down list:

- New Plan:
Using the New Plan option from the Action drop-down list, you may create new plans within the Plan application. To Create a New Plan using this option, see ["Create a Plan from the Plan Library"](#) on page 2-8.
- Delete Selected Plan:
Using the Delete Selected Plans option, in conjunction with the selection box listed as the first column within the Library grid, you may delete one or many existing plans. To Delete Selected Plans, see ["Delete a Plan from the Plan Library"](#) on page 2-8.
- Customize Table:
The display of information on the Plan Library screen may be altered using the following three Tab options: Sort, Filter and Change. Each of these options are explained in detail in ["Customize Table"](#) on page 2-9.
- Print of Export:
Information may be printed or exported to an excel spreadsheet. Follow the procedure illustrated in ["Print or Export"](#) on page 2-11.

3. Plan Library Grid:

The following table describes the columns within the Plan Library Grid:

Table 2–2 Plan Library Grid Columns

Column Heading	Description
Selection Box	Check this box to select one or more plans listed.
Plan Status	<p>The Plan Status column displays the status of the plan. The status is derived based on the lowest valued item within the plan.</p> <p>In Progress is the default status indicating that the plan is currently under development.</p> <p>Ready indicates that the plan has been completed and is ready to be reviewed by another user.</p> <p>Validated indicates that the plan has undergone validation and is prepared to be submitted.</p> <p>Submitted indicates the plan has been submitted to other downstream systems.</p> <p>Changed indicates a plan has been submitted and now it is being edited.</p>
Plan	<p>The various columns within the Plan group columns may vary depending on how your company implemented Oracle Plan. You may see the following columns:</p> <p>The Division columns provide detailed descriptive information about your company and a level in the merchandise hierarchy.</p> <p>The Group may be a numeric code identifying another level of the merchandise hierarchy.</p> <p>The Department may be a numbered code identifying the department level within your company's merchandise hierarchy.</p> <p>The Name is the Plan name. The name is a hyperlink to open the plan and access the Plan Worklist screen.</p>
Plan Period	<p>The Plan Period columns provide information about the effective dates for each plan.</p> <ul style="list-style-type: none"> ■ FY is the plan's fiscal year. ■ From is the date from which the plan period begins. ■ To is the date on which the plan period ends.
Aggregate Period	Time frame that stores are available to the plan and indicates to which volume group they belong.
Access	<p>The Access field displays your access rights to a specific plan. Write access enables you to edit the plan. Read-Only access lets you review the plan. Locked access means another user currently has access to that plan. Only one user may have write access to a plan at any time.</p>
Plan Updater	These columns contain dates last updated by the plan update process.

Note: Auto-Update Check Box: select this box to tell the nightly Plan update process to include this plan in its updating processes.

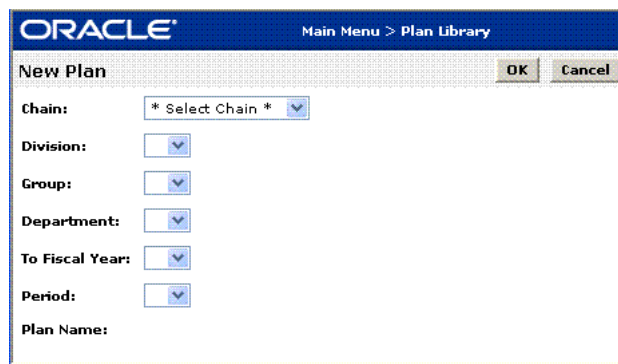
You may notice some delay accessing your plan due to the update process.

Create a Plan from the Plan Library

The **New Plan** option within the Action drop-down field will allow you to create plans. This newly created plan will then be listed on the Plan Library screen.

1. From the Main Menu, select the Planning hyperlink. The Plan Library will display.
2. Navigate to the Action drop-down field. From the drop-down list provided select: New Plan.
3. Click the Apply Button.
4. The following New Plan pop-up screen will appear:

Figure 2–6 New Plan Pop-up screen



Fill in the necessary information using the drop-down fields.

5. When complete, select the OK button. This saves the newly created plan.

Delete a Plan from the Plan Library

The **Delete Selected Plans** option within the Action drop-down field will allow you to delete one or many plans listed on the Plan Library screen.

1. From the Main Menu, select the Planning hyperlink.
The Plan Library displays.
2. Navigate to the bottom of the Library screen where all the plans are listed. Decide which plan(s) you want to delete. Navigate to the Selection Box directly to the left of the Plan name.
3. Click the Selection Box in front of the plan to select the plans.
4. Navigate to the Action drop-down field. From the drop-down list provided select: Delete Selected Plans
5. Click the Apply Button.

Notice the plan(s) selected will not be listed on the Plan Library screen.

Publish Selected Plans to RDM

The Publish Selected Plans to RDM option within the Action drop-down field will allow you to publish plan information to a system outside of Oracle Plan.

1. From the Main Menu, select the Planning hyperlink.
The Plan Library displays.

2. Navigate to the bottom of the Library screen where all the plans are listed. Decide which plan(s) you want to Publish. Mouse to the Selection Box directly to the left of the Plan name.
3. Click the Selection Box in front of the plan to select the plans.
4. Navigate to the Action drop-down field. From the drop-down list provided select: Publish Selected Plan
5. A pop-up will appear asking you to confirm you wish to Publish.
Click the OK Button.

Customize Table

Using the Customize Table option, you may change the display of Plans listed within the Plan Library screen. Do this in the following ways:

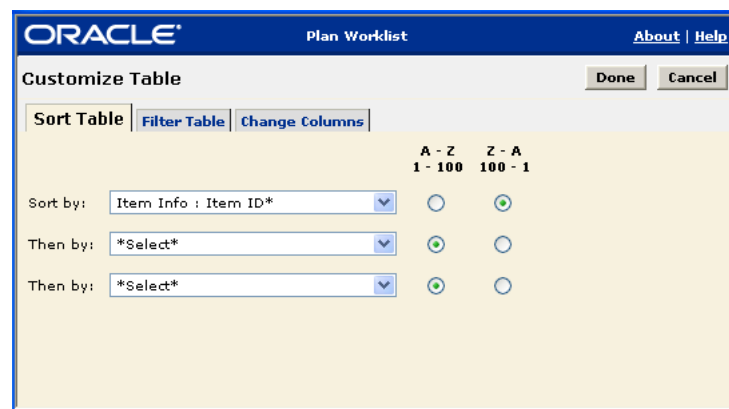
Sort the display by up to three options. Each of the options may be ordered in ascending/alphabetical or descending/reverse alphabetical order.

You have the option to select which columns to show or hide and rearrange the vertical layout of the columns. **Note that column names preceded by an asterisk are required columns** and cannot hide.

You may also create filters to limit certain information from the display of the Library screen.

1. From the Main Menu, click Planning.
The Plan Library appears.
2. Locate the Action drop-down field. From the list, select Customize Table and click the Apply button.
The Customize Table pop-up screen appears:

Figure 2-7 Customize Table Pop-Up



3. Three Tabs are visible on the Customize Table pop-up screen:
 - Sort Table** - allows you to sort three fields in the grid. Select A-Z, 1 - 100 for ascending and Z - A, 100 - 1 descending.
 - Filter Table** - Filter the items in the grid by a field or fields and their values that you apply.
 - Change Columns** - allows you to hide/display move columns in the Library Grid.

4. Decide if you would like to Sort, Filter or Change Columns within the Library Grid.

To Sort

Sort using the first tab on the Customize Table screen. There are three drop-down fields to choose from, these are the three sort options available.

For each field you select to sort, you may choose:

Ascending/alphabetical (A -Z / 1 - 100) or descending/reverse alphabetical order (Z - A / 100 - 1). This defines the initial sort options for the screen.

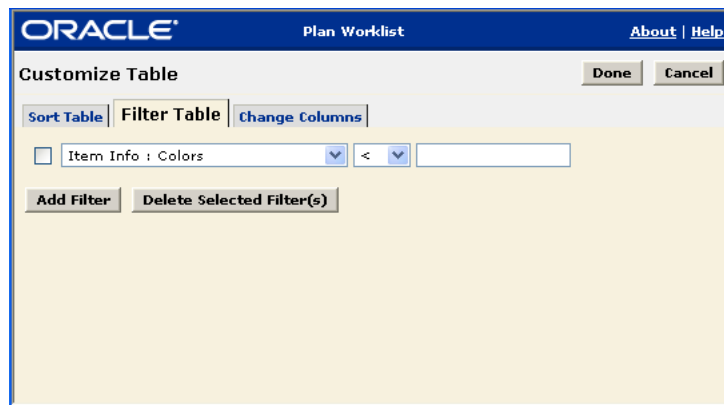
Use the drop down lists and round radio buttons to make your selections.

Click the Done button.

To Filter

Select the Filter tab. The Filter screen will display:

Figure 2–8 Filter Tab



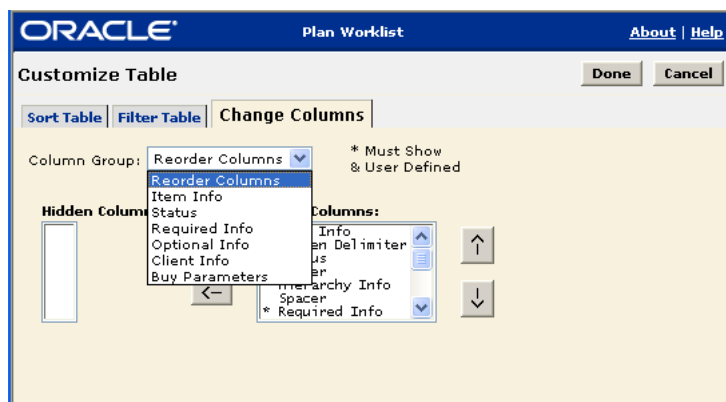
1. From the first drop-down field, a drop-down list will display.
All available fields to filter will be in the drop-down list.
2. Click on a field from the list that you wish to filter.
Move to the next drop-down field. Click on the down arrow to view the options in the drop-down list:
< (less than), <= (less than and equal to), = (equal to), >= (greater than and equal to), > (greater than), is equal to (enter a word, not a number), is not equal to (enter a word, not a number).
3. In the last box, enter the corresponding value (either a number or a word value).
4. Click the Add Filter button.
To delete, select the filter(s) you want to delete by using the selection box to the far left. All filters are visible from the Filter tab.
Click the Delete Selected Filter(s) button.
5. Continue to add Filters in this manner. When all Filters have been added, click the Done Button.

6. Notice the Filtered display field within the Title Section of the Plan Library screen will now display: Yes.

To Change Columns

Select the Change Columns Tab. The Change Columns screen displays:

Figure 2–9 Change Columns Tab



1. Click the down arrow of the Column Group drop-down field. The following options are in the drop-down list:

Reorder Columns - allows you to hide/un-hide and move a group of columns to the left or right in the grid.

Allows you to select a key field within a group of columns so you may select more fields listed within the Column box. You will be able to hide or un-hide, move right or left, the items selected.

Note: To Hide a column - you may only select fields in the Column box that are available to be hidden (do not have an * asterisk).

2. Navigate to the Columns box. Select a field to move.

Use the UP arrow button to move a field UP in the Columns box, this moves the column in the Library Grid to the left.

Use the Down arrow button to move a field DOWN in the Columns box, this moves the column in the Library Grid to the right.

Use the LEFT arrow button (arrow points to the Hidden Columns box), to move a field into the Hidden Columns box, this hides the column in the Library Grid.

Use the Right arrow button (arrow points to the Columns box), to move a field from the Hidden Columns box into the Columns box, this displays the column in the Library Grid.

3. Click the Done Button.

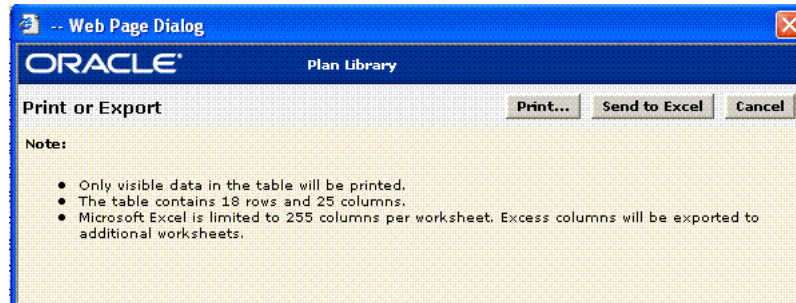
Print or Export

1. From the Main Menu, click Planning.
The Plan Library appears.

2. Navigate to the Action drop-down field.
3. From the Action list, click the down arrow. From the list, select the Print or Export option. Click the Apply button.

The Print or Export dialog appears:

Figure 2–10 Print Dialog



4. Click the Print button to whole Items Grid with all of the items in the Plan.
BE CAREFUL OF THE ORIENTATION OF THE PAPER WHEN PRINTING.
5. Click the Send to Excel button. Navigate to a local drive to save your file.
Follow your local print dialog pop-up directions
Save the file in Excel for future use or to manipulate further.

Using The Plan Worklist

Once a Plan is created, the next step in the planning process is to develop an assortment skeleton by adding 'mock' items to the plan. Use the Plan Worklist screen to manage all activities related to the items within a plan, view important metrics and navigate to important setup activities.

This chapter section contains the following topics.

- ["Identifying Plan Data Segments"](#) on page 3-1
- ["Understanding the Purpose of the Plan Worklist"](#) on page 3-2
- ["The Plan Worklist Screen Layout"](#) on page 3-2

Identifying Plan Data Segments

Since the Plan Worklist screen is the center point of contact when creating a plan, it is important to mention that the data within a plan may be organized and created for different purposes.

The Plan application has three data segments: AP (Assortment Plan), Need and LSP (Last Submitted Plan).

The item information entered on the Plan Worklist through the Plan Setup screens are common to all data segments; however, each segment has its own receipt quantities which are accessed using the Plan Review screen.

- AP is the assortment plan of record. Upon submit, its information will be sent to other down stream systems (if configured to do so). AP Receipt quantities may be derived by a number of methods including: manual input, calculation tools, or by copying other segments.
- Need is a plan based on the bottom-up forecast generated by the system. After you enter item information on the Plan Worklist and complete all calculation parameters for an item, triggering the generation of a forecast, the Need segment will auto calculate. This data segment can be modified only by altering the calculation parameters, and thus changing the forecast.
- LSP is the last submitted plan. When an item is submitted, its AP segment is copied to LSP. This version of the LSP now becomes the AP that was last submitted.

Each screen accessed from the Plan Review section: Assortment View, Item View and Flow View will allow you to view all data segments maintained within the application.

Understanding the Purpose of the Plan Worklist

The Plan Worklist screen is the central point of contact for managing, viewing and navigating to all planning activities within a plan.

The purpose of this screen is to:

1. Navigate to the Plan Setup section to access Store Sets, Product Groups and, if necessary, allocate budget or reserve dollars across Product Groups within a plan. For more information on the Plan Setup section of the application see [Chapter 5, "Using the Plan Setup Section"](#).
2. Develop an assortment skeleton by adding 'mock' items to a plan and manage all activities related to the items within a plan. See [Chapter 6, "Setting Up Items"](#) about managing items within a plan

The Plan Worklist screen is also where you can access buy parameters. See [Chapter 7, "Buy Parameters"](#).

3. Navigate to the Plan Review section and view data for planned receipts by Store Set/Store Grade, detailed metrics relating to sales, receipts, and inventory. Also view the receipt flow plan for all items in the plan by week. For detailed information about the Plan Review section of the application see [Chapter 8, "Using Plan Review"](#).

The Plan Worklist Screen Layout

Once you access the Plan Worklist, you may notice that the screen can be divided into four specific sections:

Figure 3–1 Plan Worklist Screen

1. Title Section - This section spans the top of the Plan Worklist screen, directly beneath the Oracle heading. It includes informational fields and screen action buttons.
2. Plan Setup - This section is located in the upper left, gray, shaded box, labeled Plan Setup. This gray box includes three hyperlinks to various setup screens.
3. Plan Review - This section is located in the upper right, gray, shaded box, labeled Plan Review. This gray box includes three hyperlinks to various views within the application.
4. Item Setup - Located in the bottom half of the Plan Worklist screen and includes an Action drop-down field, a Product Groups drop-down show field, copy and paste buttons, display fields and the Item Grid.

The Item Grid is Located within the lower section of the Item Setup section of the Plan Worklist screen. This section contains item, hierarchy, required, optional and

client information, item status, buy parameters and pack configuration columns. To view this section in its entirety, please use the scroll bar on the bottom of the screen, then expand all the columns in the grid.

Title Section

There are eight informational fields listed within the Title Section of the Plan Worklist screen. The display and location of these fields cannot be changed and are a permanent part of the screen.

Figure 3–2 Title Section of the Plan Worklist Screen



Table 3–1 Title Section Fields

Field	Description
Plan Worklist	Screen title
Dept Name	The department's name for which this plan applies.
Dept	The department, may be a numeric code, for which this plan applies.
Period	The date range this plan is eligible to be
Store Set	The name of the Store Set that has been assigned to this plan. For procedures on assigning Store Sets to a Plan, see Chapter 4, "Using the Store Set Management Utility" .
Store Period	The date range stores are eligible for this plan.
Plan Status	The Plan's status is derived based on the lowest value of any item in the Plan: In Progress - default status indicating that the Plan is currently under development Ready - completed and is ready to be reviewed by another user Validated - items have undergone validation and prepared to be submitted Submitted - saved to the database Changed - once submitted, must be in Changed status in order to edit
Filtered	Indicates with Yes or No if the Plan has any previously applied filters. For procedures on setting table filters, see "Customize Table" on page 2-9. For procedures on how to set a Product Group filter see, "Product Groups Drop-Down Field and Show Button" on page 3-6.

Also within this section of the screen are three buttons. These buttons allow for the following actions to be applied to the whole Plan Worklist screen.

Table 3–2 Title Section Buttons

Button Name	Description
Save	Use this button to save any changes made to the database and remain on the screen
Revert	Discards any changes made to the screen and reverts to the last saved state. The user remains on the current screen, and the data refreshes.
Done	Use this button when you are finished with any actions on the screen and wish to exit out of the current screen. If you have made changes to the screen, you are prompted to save your changes.

Plan Setup Section

The Plan Setup Section of the Plan Worklist screen facilitates access to various plan setup actions. See Table 1-3 for hyperlinks and descriptions.

Figure 3–3 Plan Setup Section

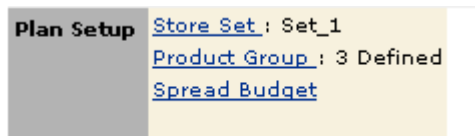


Table 3–3 Plan Setup Hyperlinks

Hyperlink	Description
Store Set	<p>A Plan may include many stores. In order to manage these stores, you may need to create smaller groups of stores, called subsets. A subset could be a group of stores that share a similar characteristic, such as: climate, fashion segment or region. View, Print or Export Store Sets from this hyperlink.</p> <p>For information on using the Store Sets within the Plan Setup section of the Worklist screen see Chapter 5, "Using the Plan Setup Section".</p> <p>Go to the Store Set Management utility for details and procedures on how to Create, Edit, Delete, Merge, Copy and View Store Sets, see Chapter 4, "Using the Store Set Management Utility".</p>
Product Group	<p>Use Product Groups to manage similar types of items. Product Groups allow you to assign items to a Product Group - based on a common attribute such as style, fashion segment or region.</p> <p>Create, View, Edit, or Delete a Product Group from the Plan Setup Section. See Chapter 5, "Using the Plan Setup Section".</p> <p>Assign Product Groups to individual items from the Items Grid using the drop-down list. For procedures see Chapter 6, "Setting Up Items".</p> <p>Filter the view of items on the Plan Worklist by applying the Product Group show filter, see "Product Groups Drop-Down Field and Show Button" on page 3-6.</p>
Spread Budget	<p>This hyperlink allows you to assign budget dollars (or reserve budget) across one or all Product Groups assigned to items in your plan.</p> <p>For information and Procedures on using this hyperlink, see Chapter 5, "Using the Plan Setup Section".</p>

Plan Review Section

The Plan Review section includes hyperlinks to three views which allow you to manage and track your plans. In each view, you may access and view AP, LSP and Need data segments and other important information.

Figure 3–4 Plan Review Section



Table 3–4 Plan Review Hyperlinks

Hyperlink	Description
Assortment View	Displays all the items contained in your plan with data on planned receipts by Store Grade and Store Subsets. Information may be viewed at the item and color level by specific Product Groups and Subsets. This is the area in which you may define and edit receipt quantities for the AP data segment. For more information see "Understanding Assortment View" on page 8-4.
Item View	This hyperlink displays Sales, Receipts, Inventory and detailed matrix by week for a particular item, color or group of items such as class or product group. See "Understanding Item View" on page 8-12.
Flow View	This hyperlink shows the receipt flow plan for all items in the plan by week. Compare them to the top down financial planning constraints set for the class and Product Group by month. See "Understanding Flow view" on page 8-17.

Item Setup Section

The Item Setup Section includes a mixture of the following types of fields, buttons and most notably the Item Grid:

- Action drop-down field
- Product Groups drop-down show field
- Copy and Paste buttons
- Display fields
- Items Grid

Figure 3–5 Item Setup Section

The screenshot shows the 'Item Setup' window. At the top, there's an 'Action' dropdown menu with '(select action)' selected, an 'Apply' button, and a 'Product Groups' dropdown set to 'All'. To the right, it says '2 Items 0 Items Actualized'. Below these are 'Copy from Selected' and 'Paste to Selected' buttons. The main area contains a table with columns: Item ID, Description, Purch Type, Colors, Status, Actualize, AP, Sub-Department, Class, Sub-Class, Product Group, Cost*, Retail*, IMU, Pack*, Min*, Pres, and Min. Two items are listed: Item 3 (skirt) and Item 1 (short).

Action Drop-Down Field

The Action drop-down list on the Plan Worklist screen is used to execute actions for creating, reviewing and modifying item data. Table 1-5 lists the Action drop-down list field options that are available from the Item Setup section of the Plan Worklist screen:

Figure 3–6

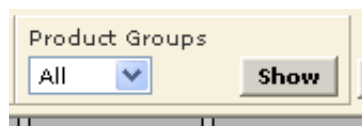
The screenshot shows the 'Action' dropdown menu open. The options listed are: (select action), Add Items, Change Selected Status, Submit Selected Items, Delete Selected, Validate Items, Request a Forecast, Customize Table, and Print or Export. The 'Apply' button is visible to the right of the dropdown.

Table 3–5 Action Drop-Down Field Options

Action Drop Down Options	Descriptions
Add Items	Select this option to add mock or real items to your Plan. The Add items pop-up window appears and prompts you to enter a number of new style-level item rows. When the Add item button
Change Selected Status	After selecting an item for the Plan Worklist Grid, you may change items' AP status: In Progress - item is currently being planned and is not complete. Ready - item is ready to be planned. Validated - item has been actualized and confirmed to be a valid item. Changed - once an item has been submitted, assign Changed status to make further edits.
Submit Selected Items	After an item or group of items, have been: actualized, planned, pack optimizations complete, and all checks have been done and are correct, you may submit items to the database. When correctly submitted, the item status will be: S (Submitted).
Delete Selected	Remove selected items from the Plan. Use this option in conjunction with the selection box, located in the first column of the Items Grid.
Validate Items	Compare actual items to the item master to check for any discrepancies/errors.
Request a Forecast	Re-Forecasts a selected item based on current Buy Parameters. If the forecast is currently complete or pending, a printable window with errors and status of any pending forecast requests will appear.
Customize a Table	Hide/Show columns, sort columns and filter columns Using the Workflow Bar and Plan Library, Customize Table. See " Customize Table " on page 2-9.
Print or Export	Print a grid or export the grid to Excel. See " Print or Export " on page 2-11.

Product Groups Drop-Down Field and Show Button

Filter the Item data located in the Items grid by a Product Group assigned to the plan. Using the Product Groups drop-down field, you can apply a filter to display a Product Group's items within the Plan Worklist Screen.

Figure 3–7 Product Groups Drop-Down Field

If the Worklist screen already has a Product Group Filter applied you will see the indicator Yes located in the Title section of the Plan Worklist screen. Follow these steps to create a Product Group filter:

1. From the Items Set-up Section within the Plan Worklist screen, navigate to the Product Groups drop-down field.
2. Click the down arrow located to the right of the field. Select an available Product Group from the drop-down list.
Important - To display all Product Groups and get rid of the filter, select the ALL option.
3. Click the Show Button located to the right of the Product Groups field. Notice the Items Grid will only contain items that belong to the selected Product Groups

Note: To take off a Product Group filter, navigate to the Product Group drop-down field, select ALL from the list of options. This will display all items within the Worklist and remove the filter.

4. Notice within the Title section of the Worklist screen, under the Filter display field the word Yes, is displayed.

Copy and Paste Buttons

Copy item information from one item to another by using the Copy/Paste Buttons. Selecting the Copy button will launch a Copy Items pop-up screen prompting you to select item information from various columns.

From the Worklist screen, navigate to the Items grid. Select the item you wish to copy:

1. Select the item to copy by clicking inside the selection box in front of the item to copy. You may only copy one item at a time.
2. Click the Copy button, the following Copy Item pop-up screen will appear:

Figure 3–8 Copy Item Pop-Up Screen

Copy Item [Copy] [Cancel]

Select the fields to copy from the chosen item to the destination items.

<input checked="" type="checkbox"/> Item Info	<input checked="" type="checkbox"/> Hierarchy Info	<input checked="" type="checkbox"/> Required Info	<input checked="" type="checkbox"/> Optional Info	<input checked="" type="checkbox"/> Client Info	<input type="checkbox"/> Buy Parameters
<input checked="" type="checkbox"/> Description	<input checked="" type="checkbox"/> Sub-Department	<input checked="" type="checkbox"/> Product Group	<input checked="" type="checkbox"/> Brand	<input checked="" type="checkbox"/> Fabric	<input type="checkbox"/> Like Item
<input checked="" type="checkbox"/> Purch Type	<input checked="" type="checkbox"/> Class	<input checked="" type="checkbox"/> Cost*	<input checked="" type="checkbox"/> Vendor	<input checked="" type="checkbox"/> Fit	<input type="checkbox"/> Store Base
	<input checked="" type="checkbox"/> Sub-Class	<input checked="" type="checkbox"/> Retail*	<input checked="" type="checkbox"/> Collection	<input checked="" type="checkbox"/> Rise/Sleeve	<input type="checkbox"/> Store Flow
		<input checked="" type="checkbox"/> Pack*	<input checked="" type="checkbox"/> Size Range	<input checked="" type="checkbox"/> Fabric Characteristics	<input type="checkbox"/> Pricing Plan
		<input checked="" type="checkbox"/> Min*	<input checked="" type="checkbox"/> Floor Set	<input checked="" type="checkbox"/> Reg/Petite/Tall	<input type="checkbox"/> DC Flow
		<input checked="" type="checkbox"/> Pres Min*	<input checked="" type="checkbox"/> Color Family	<input checked="" type="checkbox"/> Lifestyle	
			<input checked="" type="checkbox"/> Season Code	<input checked="" type="checkbox"/> Features	
			<input checked="" type="checkbox"/> Vendor Style	<input checked="" type="checkbox"/> Neck	
			<input checked="" type="checkbox"/> Prod Type	<input checked="" type="checkbox"/> Theme Code	
			<input checked="" type="checkbox"/> Origin Ind	<input checked="" type="checkbox"/> Theme Name	
			<input checked="" type="checkbox"/> Alloc Flag		
			<input checked="" type="checkbox"/> Attribute 1		
			<input checked="" type="checkbox"/> Attribute 2		
			<input checked="" type="checkbox"/> Attribute 3		
			<input checked="" type="checkbox"/> Attribute 4		
			<input checked="" type="checkbox"/> Attribute 5		
			<input checked="" type="checkbox"/> Notes		

3. Click inside the boxes in front of the information you wish to copy.

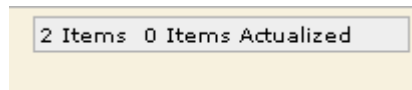
Note: Click the selection box located in the column heading to select all information in the list.

4. When all information has been selected to copy, click the Copy button.
5. Navigate to the item in the Items grid you wish to paste the selected Copy information.
6. Select the item. Click the Paste button.

Display Fields

Located to the right of the Copy and Paste buttons are two numeric display fields:

Figure 3–9 Display Fields



The display fields communicate important metrics about the items within the plan selected:

- number of items included in the plan
- number of actualized items in the plan

Items Grid

The Item Grid Section includes item information displayed within a grid (columns and rows).

Columns contain information about the items. Columns are grouped into heading categories which may be expanded + or collapsed -, use the expand/collapse buttons located within the grid.

Rows contain all of the items within your plan.

Table 3–6 Items Grid

Column Heading Categories	Description
Item Info	The item information columns include the following columns: expand/collapse, Item ID #, Description, Type, Colors
Status	Actualize items and access AP information from the Status columns.
Hierarchy Info	The hierarchy columns include three client specific levels within your company that is appropriate when creating Plans.
Required Info	These fields are specific to your company and how you do business.
Optional Info	These fields are specific to your company and business.
Client Info	These fields are specific to your business.
Buy Parameters	The buy parameters columns include the following: Like Items, Store Base, DC Flow, Store Flow, Pricing Plan and Forecast.
Pack Configurations	If the item is actual, click on the available hyperlink to view and edit pack configurations.

Use the expand buttons to view all the columns in a column category. For detailed procedures and information on working with items in plans, see [Chapter 6, "Setting Up Items"](#) and [Chapter 10, "Submitting Items"](#).

Using the Store Set Management Utility

A store set is a collection of stores and may be divided into one or more subsets. A subset contains a group of stores that share a characteristic, such as region, climate, fashion segment, ad designation, or user-specific attribute.

This chapter illustrates how to perform the following actions to store sets:

- ["Understanding Store Sets and Subsets"](#) on page 4-1
- ["Creating New Store Sets"](#) on page 4-3
- ["Renaming Store Sets"](#) on page 4-4
- ["Merging Store Sets"](#) on page 4-4
- ["Copying a Store Set"](#) on page 4-3
- ["Removing Store Sets"](#) on page 4-4
- ["Viewing Other Store Sets"](#) on page 4-5
- ["Customizing a Table"](#) on page 4-5
- ["Printing or Exporting"](#) on page 4-8

Also within this chapter is important information on managing subsets. The following topics are discussed:

- ["Adding Stores to a Store Subset"](#) on page 4-9
- ["Deleting a Store Subset"](#) on page 4-10
- ["Filtering Subsets"](#) on page 4-11
- ["Changing the Store Set Type to Static:"](#) on page 4-13

Understanding Store Sets and Subsets

A store set is a collection of stores. Store sets are divided into one or more subsets. A subset contains a group of stores that share a characteristic, such as region, climate, fashion segment, ad designation, or user-specific attribute. A store can only be a member of one subset in a given store set. However, stores can be in more than one store set.

Store sets are either static or dynamic:

- Store sets are used to facilitate store assignments for assortment planning.
- Static store sets are not automatically updated.
- Manually assigning store to a subset will change a dynamic store set to static.

- Store sets cannot be changed from static to dynamic.

Identifying the Store Set Library Screen Layout

The Store Set Library contains a list of all store sets your user account is able to access. This library provides a point of access to all actions within the store set screens.

The Store Set Library contains two sections:

- Action drop-down field
- Store Set grid

Figure 4–1

<input type="checkbox"/>	Name	# Subsets	Created By	Date Created	Last Used	Type
<input type="checkbox"/>	USA Niagara Falls	1	mz	03/10/2006	03/10/2006	Dynamic
<input type="checkbox"/>	K1 StoreSet	2	root	03/06/2006	03/06/2006	Static
<input type="checkbox"/>	FASHION_SEG	1	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	STORE_AD_GROUP	2	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	STORE_SSC	2	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	CLIMATE	1	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	STORE_STATE	11	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	ALL	2	root	02/26/2006	02/26/2006	Dynamic

1. Action Drop-Down Field

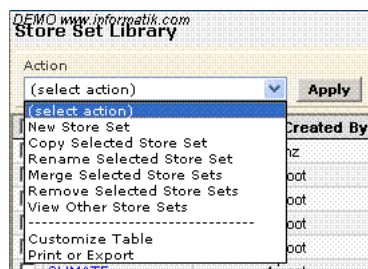
The Action Drop Down field within the Store Set Library contains the following drop-down options:

- New Store Set
- Copy Selected Store Set
- Rename Selected Store Set
- Merge Selected Store Set
- Remove Select Store Set
- View Other Store Set

The following figure 13-2 illustrates the Store Set Library Action Drop-Down list:

To view your own Store Sets, Subsets and Stores:

Figure 4–2



2. Store Set Library Grid

The following list identifies the columns in the grid and their definitions:

- Name - the name of the Store Set
- # Subsets - the current number of Subsets assigned to the Store Set
- Created By - the user id of the user that created the Store Set
- Date Created - the date the user created the Store Set
- Last Used - the most recent date the Store Set was accessed by a user
- Type - Static or Dynamic, see ["Changing the Store Set Type to Static:"](#) on page 4-13

Figure 4-3

<input type="checkbox"/>	Name	# Subsets	Created By	Date Created	Last Used	Type
<input type="checkbox"/>	USA Niagara Falls	1	mz	03/10/2006	03/10/2006	Dynamic
<input type="checkbox"/>	K1 StoreSet	2	root	03/06/2006	03/06/2006	Static
<input type="checkbox"/>	FASHION_SEG	1	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	STORE_AD_GROUP	2	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	STORE_SSC	2	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	CLIMATE	1	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	STORE_STATE	11	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	ALL	2	root	02/26/2006	02/26/2006	Dynamic

Using the Store Set Action Field Options

Once you access the Store Set Library, use the Action drop-down field and list of options to perform various tasks.

Creating New Store Sets

Store sets can make your work easier by grouping like stores together. Select the New Store Set option to create a new Store Set:

1. From the Main Menu, click Store Set Management.
The Store Set Library appears.
2. From the Action drop-down list, select the New Store Set option and click Apply.
A new store set named NewStoreSetn is created and added to the Store Set Library.

For information on how to rename the store set, see ["Renaming Store Sets"](#) on page 4-4

Copying a Store Set

You may copy a store set to create a foundation for building a new store set. Add or remove stores or subsets from the store set you copy to create a store set defined by whatever filters you choose.

1. From the Main Menu, click Store Set Management
The Store Set Library appears
2. Click the check box in front of the store set you want to copy.

3. From the Action list, select Copy Selected Store Set and click Apply.

Note: Only one store set may be copied at a time.

A new store set named Copy of store_set_name is created and added to your Store Set Library. For information on how to rename the new store set, see

Renaming Store Sets

Once you have created a store set, you may change the name automatically assigned by Plan to give it a more meaningful name.

1. From the Main Menu, click Store Set Management.
The Store Set Library screen appears.
2. Click the check box of the store set whose name you are changing.
3. From the Action drop-down list, select Rename Selected Store Set and click Apply.
The Rename Store Set screen appears.
4. Enter the new name for the store set and click the Rename button.

Note: Only letters, digits, a space or "_" are valid characters available for naming or renaming a store set or subset.

Merging Store Sets

You may blend existing store sets to create a new store set. The store sets you merge continue to exist independently. You can merge two or more store sets together - only two at a time.

Important - Merged Store Set will be Static Store Sets.

1. From the Main Menu, click Store Set Management.
The Store Set Library appears.
2. Click the check box of the two store sets you want to merge.
3. From the Action list, select Merge Selected Store Sets and click Apply.

The Store Sets you selected are merged and appear on the Store Set Library with the name Store_Set_Name_1-Store_Set_Name_2. The original store sets are unaffected. For information on how to rename the new store set, see

To merge another store set with the store set you just created by merging, repeat steps 3 and 4. Only two store sets may be merged at a time.

Removing Store Sets

Once you remove a store set, you cannot retrieve it. You must recreate the store set if you change your mind.

1. From the Main Menu, click Store Set Management.
The Store Set Library appears.
2. Click the check box of the store set you want to remove.
3. From the Action list, select Remove Selected Store Set and click Apply.

The store set is deleted.

Viewing Other Store Sets

1. From the Main Menu, click Store Set Management.
The Store Set Library screen appears.
2. From the Action drop-down list, select View Other Store Sets and click the Apply button.
The View Other Store Set screen appears.
3. Either enter the user name in the User Name field and/or enter the Store Set name in the Store Set Name field.
4. Click the Find button.
5. The Store Set(s) that match the User Name and/or Store Set name will appear in the list.

Note: This allows you to see Store Sets created by other users within the Plan application.

The store set(s) appear in your library with the name of the original creator.

For information on how to rename the store set, "[Renaming Store Sets](#)" on page 4-4.

Customizing a Table

Using the Customize Table option, you may change the display of Store Sets listed within the Store Set Library screen. Do this in the following ways:

Sort the display by up to three options. Each of the options may be ordered in ascending/alphabetical or descending/reverse alphabetical order.

You have the option to select which columns to show or hide and rearrange the vertical layout of the columns. Note that column names preceded by an asterisk are required columns and cannot hide.

You may also create filters to limit certain information from the display of the Store Set Library screen.

1. From the Main Menu, click Store Set Management.
The Store Set Library appears.
2. Locate the Action drop-down field. From the list, select Customize Table and click the Apply button.
The Customize Table pop-up screen appears:

Figure 4-4 Customize Table Pop-Up

- Three Tabs are visible on the Customize Table pop-up screen:

Sort Table - allows you to sort three fields in the grid. Select A-Z, 1 - 100 for ascending and Z - A, 100 - 1 descending.

Filter Table - Filter the items in the grid by a field or fields and their values that you apply.

Change Columns - allows you to hide/display move columns in the Library Grid.

- Decide if you would like to Sort, Filter or Change Columns within the Library Grid.

To Sort

Sort using the first tab on the Customize Table screen. There are three drop-down fields to choose from, these are the three sort options available.

For each field you select to sort, you may choose:

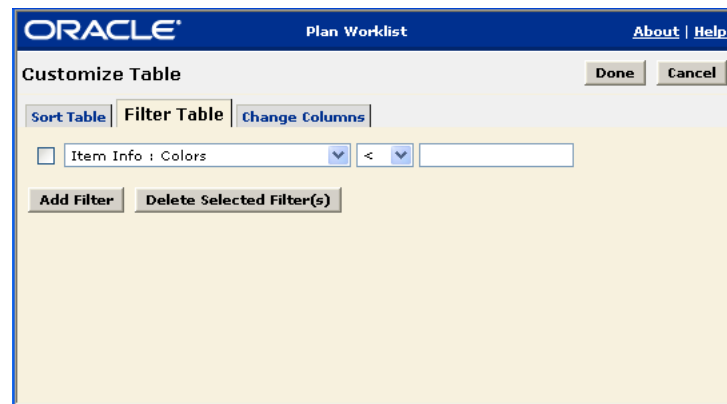
Ascending/alphabetical (A -Z / 1 - 100) or descending/reverse alphabetical order (Z - A / 100 - 1). This defines the initial sort options for the screen.

Use the drop down lists and round radio buttons to make your selections.

Click the Done button.

To Filter

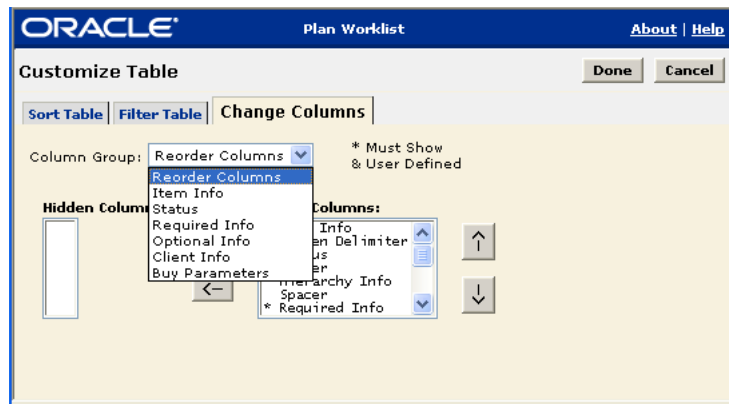
Select the Filter tab. The Filter screen will display:

Figure 4–5 Filter Tab

1. From the first drop-down field, a drop-down list will display.
All available fields to filter will be in the drop-down list.
2. Click on a field from the list that you wish to filter.
Move to the next drop-down field. Click on the down arrow to view the options in the drop-down list:
< (less than), <= (less than and equal to), = (equal to), >= (greater than and equal to), > (greater than), is equal to (enter a word, not a number), is not equal to (enter a word, not a number).
3. In the last box, enter the corresponding value (either a number or a word value).
4. Click the Add Filter button.
To delete, select the filter(s) you want to delete by using the selection box to the far left. All filters are visible from the Filter tab.
Click the Delete Selected Filter(s) button.
5. Continue to add Filters in this manner. When all Filters have been added, click the Done Button.
6. Notice the Filtered display field within the Title Section of the Plan Library screen will now display: Yes.

To Change Columns

Select the Change Columns Tab. The Change Columns screen displays:

Figure 4–6 Change Columns Tab

1. Click the down arrow of the Column Group drop-down field. The following options are in the drop-down list:
 Reorder Columns - allows you to hide/un-hide and move a group of columns to the left or right in the grid.
 Allows you to select a key field within a group of columns so you may select more fields listed within the Column box. You will be able to hide or un-hide, move right or left, the items selected.

Note: To Hide a column - you may only select fields in the Column box that are available to be hidden (do not have an * asterisk).

2. Navigate to the Columns box. Select a field to move.
 Use the UP arrow button to move a field UP in the Columns box, this moves the column in the Library Grid to the left.
 Use the Down arrow button to move a field DOWN in the Columns box, this moves the column in the Library Grid to the right.
 Use the LEFT arrow button (arrow points to the Hidden Columns box), to move a field into the Hidden Columns box, this hides the column in the Library Grid.
 Use the Right arrow button (arrow points to the Columns box), to move a field from the Hidden Columns box into the Columns box, this displays the column in the Library Grid.
3. Click the Done Button.

Printing or Exporting

You can print a store set.

1. From the Main Menu, click Store Set Management.
 The Store Set Library appears.
2. Click the name of the store set you want to print.
 The Store Set screen appears, with the Subsets tab displayed.
3. Select the Stores tab.
4. From the Action list, select Print and click Apply.

The Print dialog box appears.

5. Click Print to print the list of stores.

Understanding Store Subsets

A Store Set is a collection of subsets. A subset is a grouping of stores, often grouped on a similar attribute or characteristic. There may be many stores in a subset and multiple subsets assigned to a store set.

In order to view subset information you need to know the store set the subset belongs to. If this is not known, use the Find search option "[Finding a Store](#)" on page 4-13.

Adding Stores to a Store Subset

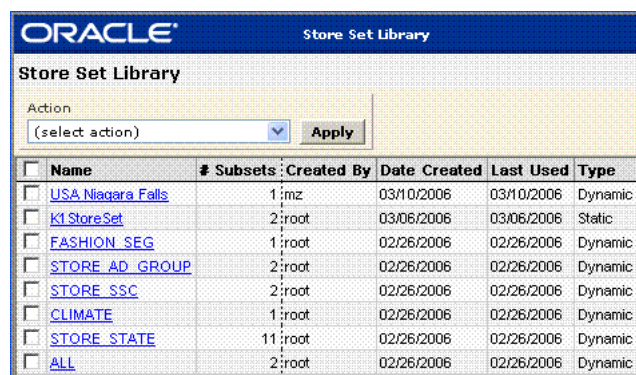
You can add stores to a store subset or replace the existing stores in a store set with different stores.

To add or replace stores in a store subset:

1. From the Main Menu, click Store Set Management.

The Store Set Library appears.

Figure 4–7



<input type="checkbox"/>	Name	# Subsets	Created By	Date Created	Last Used	Type
<input type="checkbox"/>	USA Niagara Falls	1	mz	03/10/2006	03/10/2006	Dynamic
<input type="checkbox"/>	K1 StoreSet	2	root	03/06/2006	03/06/2006	Static
<input type="checkbox"/>	FASHION_SEG	1	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	STORE_AD_GROUP	2	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	STORE_SSC	2	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	CLIMATE	1	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	STORE_STATE	11	root	02/26/2006	02/26/2006	Dynamic
<input type="checkbox"/>	ALL	2	root	02/26/2006	02/26/2006	Dynamic

2. Click in the selection box of the name of the store set that you want to add stores to.

The Store Set screen appears, with three tabs: Subsets, Filters, and Stores.

Note: The Subsets tab contains a list of the names of the subsets in the store set.

Figure 4–8 Subsets Tab

ORACLE Store Set Library > Store Set

Store Set: USA Niagara Falls Store Set Type: Dynamic Done

Subsets Filters Stores

Action: (select action) Apply

Name	# Stores
Niagara Falls	366

List stores to be added to selected subset.

Add Stores to Selected Subset

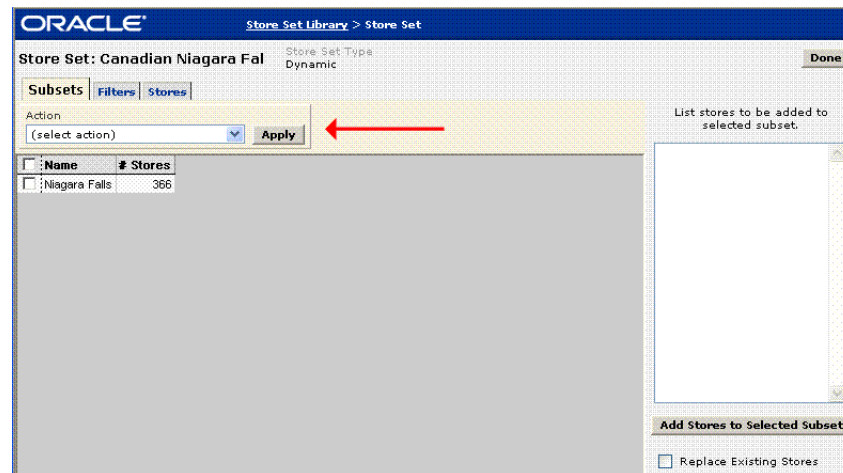
☐ Replace Existing Stores

3. From within the Subsets tab, click inside the selection box in front of the name of the subset.
Enter the Store IDs of the new stores into the text box.
Note: Enter Store IDs one at a time.
4. If you want to replace the existing stores in the subset, select the Replace Existing Stores check box.
5. Enter the new Store ID and click the Add Stores to Selected Subset button.
6. When finished, click the Done button.

Deleting a Store Subset

Once you delete a store subset, you cannot undo the action. You must recreate the store subset if you change your mind.

1. From the Main Menu, click Store Set Management.
The Store Set Library appears.
2. Click the name of the store set that contains the subset(s) you want to delete.
The Store Set screen appears with the Store Set tab visible.
3. Click the check box(es) of the store subset(s) you want to delete.

Figure 4–9

4. From the Action list, select Remove Selected Subsets and click Apply.
The subsets you selected are deleted.

Filtering Subsets

From the Store Set: subsetname screen are three tabs. Use the Filters tab to create and delete filters. Filtering subsets will help you to move stores from one subset into another based on a filter you create and apply.

Note: You must have at least two Subsets created in order to use the Filtering Subsets functionality properly.

To create a new filter:

1. From the store set library, select a store set with at least two subsets.
2. Click on the store set. The Store Set screen appears with three tabs visible at the top of the screen.
3. Select the Filter tab. A similar Filter tab screen will appear:

Figure 4–10 Store Set Screen and Filter Tab

If this is true:		Invalid Date	Add	Clear	Place store in this group	# Stores
If	Open Dt	=	Invalid Date mm/dd/yyyy	<input type="checkbox"/>	NewSubSet	0
Otherwise	Remaining stores				Niagara Falls	366

4. From the field values drop-down, select a field value you want to use as your filter.
5. From the operator drop-down field, select the operator that is associated with the column field value, either:
 - is equal to or is not equal to
 - is among or is not among
 - <, <=, =, >, or >=
6. Enter a variable, such as a numeric value or a state name, as appropriate to the filter you choose.
7. Click the Add button.

To remove a specific filter:

1. Select the check box in front of the Clear field for the filter.
2. Click Clear.

To re-order the subsets:

1. Click the Reorder Subsets button.
2. Highlight the subset you want to move and use the up arrow or down arrows to change its position.
3. Click Reorder.
8. Click the Apply Filter button
9. If the filter returned acceptable results, click the Done button to exit out of the screen and save the filter.

Changing the Store Set Type to Static:

Dynamic store sets are created and maintained by means of filters and are automatically updated whenever they are being used, as the filters are re-applied or as attributes change.

For example, if stores are grouped in subsets that are defined by a square footage range, and the range attribute filters were updated or a store's square footage changed, then the stores would be re-assigned to new store sets.

Static store sets may be created manually or by using filters. They are not updated automatically; they can only be changed by deliberate user action.

You have the ability to change the store set type from dynamic to static to prevent automatic updates of the store set. In addition, if you manually assign a store to a store set, its type is automatically Static.

1. From the Main Menu, click Store Set Management.

The Store Set Library appears.

2. Click the name of the store set.

The Store Set screen appears, with the Subsets tab displayed.

3. From the Action list, select Change Store Type to Static and click Apply.

The Store Set Type is changed to Static.

Finding a Store

You can use the Find Store functionality to search for a specific store in the Stores tab of the Store Set screen.

To find a store:

1. From the Main Menu, click Store Set Management.

The Store Set Library appears.

2. Click the name of the store set you are interested in finding.

The Store Set screen appears.

3. Select the Store tab.

4. From the Action drop-down list, select Find Store and click Apply.

The Find Store dialog box appears.

5. Enter the ID for the store you want to find and click OK.

The store you are searching for appears at the top of the list and is highlighted in RED.

Using the Plan Setup Section

The Plan Setup Section of the Worklist screen is designed to facilitate some of the setup activities relating to managing a plan. Use this section of the Worklist screen to access information about store sets, subsets and stores assigned to a plan. Also, create product groups to filter plans and assign them to individual items within a plan. Finally, assign budget or reserve budget dollars for future use. You can do this here by allocating budget to store subsets across one or many product groups.

In order for a plan to be considered "complete" (and before you create a forecast) you must set up product and store groupings as described in this section.

This chapter contains the following topics:

- ["Understanding Store Sets, Subsets and Stores"](#) on page 5-1
- ["Accessing and Viewing Store Sets, Subsets and Stores"](#) on page 5-2
- ["Assigning a Primary Store Set to a Plan"](#) on page 5-4
- ["Exporting or Printing Subset Metric Information"](#) on page 5-4
- ["Understanding Product Groups"](#) on page 5-5
- ["Creating a Product Group"](#) on page 5-5
- ["Deleting a Product Group"](#) on page 5-6
- ["Understanding Spread Budget"](#) on page 5-7
- ["Showing Subsets and Allocating Budget Across Product Groups"](#) on page 5-9
- ["Allocating Reserve Budget"](#) on page 5-10

Understanding Store Sets, Subsets and Stores

A plan may contain many items that may be managed more efficiently by grouping similar items into smaller groups. Store sets are simply a group of smaller grouped stores (called subsets). Store sets are assigned to plans in order to assist you in managing items within your plan.

A store set is a group of stores that share a common characteristic, for example: a region, climate, fashion segment, ad designation, or some other attribute. A store can only be a member of one subset in a given store set. However, stores may be in more than one store set.

Subsets are created, edited, deleted and assigned to store sets using the store set manager utility within the Plan application. If you do not have access to the store set manager option within Plan, see your Plan Administrator. For information on the store set manager utility, see [Chapter 4, "Using the Store Set Management Utility"](#).

From the Plan Worklist screen use the following hyperlinks to perform the associated tasks:

- Store Set - View and access store sets, subsets and stores. Also assign a primary store set to a plan. See, "[Accessing and Viewing Store Sets, Subsets and Stores](#)" on page 5-2., for procedures.
- Product Groups - Create/Delete a Product Group. See, "[Creating a Product Group](#)" on page 5-5 and "[Deleting a Product Group](#)" on page 5-6.
- Spread Budget - Show subsets, Allocate Budget and Reserve Budget dollars. See, "[Showing Subsets and Allocating Budget Across Product Groups](#)" on page 5-9 and "[Allocating Reserve Budget](#)" on page 5-10 for detailed procedures.

Accessing and Viewing Store Sets, Subsets and Stores

Many stores may be included in a subset. Multiple subsets may be assigned to a store set. When you access a plan, you can see the store set assigned to the plan to the right of the store set hyperlink.

Use the store set hyperlink to discover which subset(s) and stores are assigned to the store set.

To View and Access store set, subset and store information:

1. From the Plan Main Menu, select the **Planning**
The **Plan Library** screen displays.
2. Locate the Plan name you want to access from the Plan Library columns grid located on the lower portion of the screen.
3. Click the Plan Name hyperlink.
The Plan Worklist screen displays.
4. Locate the Plan Setup section in the upper left corner.

Click the **Store Set** hyperlink.

The Primary Store Set screen appears.

Store Set	Created By	Subset	# Eligible Stores
Climate_Winter	mz	ALL	71
blilly_storeSet	root	RemainingSubset	0
kumu_storeSet	root		
testset-Winter	mz		
testset	mz		
Climate	root		
Winter	mz		
Tanya_StoreSet	qa		
ALL	root		

Table 5–1 Primary Store Set Fields

Field Name	Definition
Primary Store Set	
Dept. Name	Name of your company's department
Dept.	Numeric code for your company's department
Period	Time frame the plan is valid
Store Set	Name of the primary store set applied to the plan
Store Period	Time frame stores are available to the plan and volume group

Table 5–1 (Cont.) Primary Store Set Fields

Field Name	Definition
Plan Status	<p>The Plan's status is derived based on the lowest value of any item in a plan:</p> <p>In Progress - default status indicating the plan is currently under development</p> <p>Ready - plan is completed and ready to be reviewed</p> <p>Validated - plan has undergone validation and is now ready to be submitted</p> <p>Submitted - plan has been saved to the database</p> <p>Changed - plan has been submitted and now in changed status to make further edits</p>
Filtered	<p>Indicates with a Yes or No if a Customize Table and/or Product Group filter have been applied. For procedures on how to select and delete a Customize Table filter, see "Customize Table" on page 2-9.</p> <p>For procedures on how to set a Product Group filter, see "Product Groups Drop-Down Field and Show Button" on page 3-6.</p>

- Navigate to the store sets box, click the **Store Set** name that you want to view.
When you click a store set name, the list of available subsets changes according to the store set selected.
- View the list of subsets in the subsets box. Click on the subset you wish to view, the following subset metrics screen will appear:

Figure 5–1

The screenshot shows a web browser window titled 'DEMO www.informatik.com Web Page Dialog'. The Oracle logo is at the top left, and the navigation path 'Main Menu > Plan Library > Plan Worklist' is at the top right. Below the navigation path, the title 'Subset "AD"' is displayed. To the right of the title are buttons for 'Export', 'Print', and 'OK'. The main content is a table with the following columns: Store #, Store Shopping Center, City, State, Financial \$, and Store Grade. The table contains 10 rows of data.

Store #	Store Shopping Center	City	State	Financial \$	Store Grade
2200	PEN CENTRE	St. Catharines	ON	140772.00	4
2201	SOUTHCENTRE MALL	Calgary	AB	136894.00	4
2202	SOUTHGATE S.C.	Edmonton	AB	243113.00	3
2203	GUILDFORD TOWN CENTR	Surrey	BC	170236.00	4
2204	MAYFAIR SHOPPING CTR	Victoria	BC	232193.00	3
2205	CHAMPLAIN PLACE	Dieppe	NB	114671.00	4
2206	MASONVILLE PLACE	London	ON	133303.00	4
2207	PDG/PACIFIC CENTRE	Vancouver	BC	269933.00	3
2208	PROM. DE LA CATHEDR	Montreal	QC	207367.00	4
2209	PLACE STE-FOY	Ste-Foy	QC	197912.00	4

View subset and store information from this subset pop-up screen. Notice the metric information is displayed within a grid.

Note that the column headings are the metric headings and the row contents are the metric contents.

Table 5–2 Subset Metrics

Metric Heading	Metric Definition
store #	Your company has given a specific store code. This will be listed in the Store # column.

Table 5–2 (Cont.) Subset Metrics

Metric Heading	Metric Definition
Store Shopping Center	The name of the Shopping Center where the store is located.
City	The City of the store
State	The State of the store
Financial \$	Budget for the store
Store Grade	Analytical optimized ranking using various attributes for each store.

- Click the **OK** button when you are ready to navigate away from the subsets metrics pop-up screen.

Assigning a Primary Store Set to a Plan

When you access the Plan Worklist, you may see a store set assigned to the plan.

If a store set is assigned to a plan, the name of the store set will be displayed to the right of the store set hyperlink.

If no store set has been assigned, you may access the store set hyperlink and assign a store set from the store set box.

- From the Plan Worklist, navigate to the Plan Setup Section.
- Click on the Store Set hyperlink
- The Primary Store Set screen will appear. Navigate to the store set box.
- Click on the name of the store set you would like to assign to the plan.
View the subsets assigned to the store sets.
- Click the OK button
- The store set will now be assigned to the plan.

Exporting or Printing Subset Metric Information

To export to Excel or print subset metric information:

- Navigate to the Plan Set Up section of the Plan Worklist screen.
- Click the Store Set hyperlink.
- From the Primary Store Set screen, click the store set name located in the store sets box.
- Notice the list of available subsets change according to the store set selected.
- Click the subset name you want to print or export.

The subset pop-up screen appears with subset metrics.

- Click the **Export** button located on the upper right of the subset pop-up screen.
- Follow the pop-up screen's instructions for export

Figure 5–2

Store #	Store Shopping Center	City	State	Financial \$	Store Grade
2200	PEN CENTRE	St. Catharines	ON	140772.00	4
2201	SOUTHCENTRE MALL	Calgary	AB	136894.00	4
2202	SOUTHGATE S.C.	Edmonton	AB	243113.00	3
2203	GUILDFORD TOWN CENTR	Surrey	BC	170236.00	4
2204	MAYFAIR SHOPPING CTR	Victoria	BC	232193.00	3
2205	CHAMPLAIN PLACE	Dieppe	NB	114671.00	4
2206	MASONVILLE PLACE	London	ON	133303.00	4
2207	PDG/PACIFIC CENTRE	Vancouver	BC	269933.00	3
2208	PROM. DE LA CATHEDR	Montreal	QC	207367.00	4
2209	PLACE STE-FOY	Ste-Foy	QC	197912.00	4

6. To print the subset metrics as you see them in the subset pop-up screen:
 - Click the **Print** button located to the upper right of the subset pop-up screen.
 - Follow the Print pop-up screen's instructions to print from your local printer.
7. To exit out of the subset pop-up screen, click the **OK** button.

Understanding Product Groups

Use product groups to help manage your plan budget of a large set of merchandise. When product groups are assigned to items you can allocate budget dollars across all or some product groups to better manage your merchandise. Also use product groups from the Worklist screen to filter the view of items in a plan.

From the Product Group hyperlink you can create a Product Group and then designate percentages of your plan budget for each Product Group.

Use the Spread Budget hyperlink from the Create Product Group screen or navigate directly from the Spread Budget hyperlink.

Use product groups to do the following:

- Create and/or delete product groups
- Filter the view of Items within a Plan. You may do this from the Item Setup section within the Plan Worklist screen.
- Assign product groups to individual Items within a Plan. Do this from the Item Grid within the Worklist screen.
- Manage large groups of items with similar characteristics by assigning product groups to each Item.
- Allocate budget dollars and/or set aside reserve dollars by Product Group by using the Set Product Groups/Reserve% Action button
- Set Product Group Reserve%

Creating a Product Group

To create a Product Group:

1. From the Plan Setup section, click the Product Groups hyperlink.

The Create Product Groups screen appears.

Use the Name box to create Product Group names. Once a Product Group name is created, you may use the Set Product Group/Reserve% button to assign budget dollars to the new Product Group.

Also, this Product Group name now appears on the drop-down list within the Item Set-Up section of the Plan Worklist screen and within the Item Grid section (within the Required Info columns) of the same screen.

The following Action Buttons are located on the Create Product Groups screen:

Table 5–3 Action Buttons

Action Button	Description
Set Product Groups/Reserve%	Assign budget dollars to a reserve category or various product groups by store grade and subset
OK	Applies any updates or changes made to the screen
Cancel	Exit out without applying or saving changes
More Product Groups	Creates additional lines within the Name box so you are able to create more Product Group names
Delete Selected	Used in conjunction with the Name box and the selection box directly in front of the name. Deletes a Product Group from the Name box.

- In the Name box, enter the name of the product group you want to create.
You can add as many product groups as needed.
If you need to enter product groups, click the More Product Groups button. Additional fields appear below the existing ones.
- After you have entered names for all of the product groups you need, click OK.
Your product groups are saved.

Deleting a Product Group

To delete a Product Group:

- From the Plan Setup section, click the **Product Groups** hyperlink.
The Create Product Groups screen appears.

2. Navigate to the Name box, locate the selection box to the left of the name of the Product Group you want to delete.
3. Click inside the selection box. After selecting all of the product groups you want to delete, click the **Delete** Selected button.

Note: Items previously contained in a deleted Product Group are automatically re-assigned to the other available product groups within that Plan.

4. Click the **OK** button.

The selected product groups are deleted.

Understanding Spread Budget

You can now manage a plan's financial budget to a level of detail never available before. By allocating dollars to subsets and then dividing the budget across product groups, you can control your budget down to the smallest groupings possible.

Each store's financial budget is spread across the various product groups based on the percentage values indicated within the subset/store grade intersections identified on the Setup Product Group Percent screen.

In addition to assigning budget dollars to various product groups, you are able to set aside financial dollars for future use. Use the Reserve bucket for cases where late developing product exists or opportunistic buys might become available.

Use the Spread Budget hyperlink to:

- Show subsets and Allocate Budget Dollars Across Product Groups
- Allocate Reserve Dollars

Figure 5–3

Product Group	Total %	Total \$	Total by Volume Group for ALL													
			VG1(4)		VG2(8)		VG3(25)		VG4(31)		VG5(29)		VG6(42)		VG7(1)	
			%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store
Total VG \$		10877357		140794		113287		102193		82068		63682		47463		
Reserve	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
Total Less Reserve	100.0	10877357	100.0	140794	100.0	113287	100.0	102193	100.0	82068	100.0	63682	100.0	47463	100.0	
girls	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
teens	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
Other	100.0	10877357	100.0	140794	100.0	113287	100.0	102193	100.0	82068	100.0	63682	100.0	47463	100.0	

The Setup Product Group Percent screen is organized into three sections:

- Titles Section
- Store Set drop-down field and Show button Section
- Boxes Section

1. Title Section:

The title section displays across the top of the Setup Product Group Percent screen. Table 1-5 lists the fields in the Title section:

Table 5–4 Title Section Field Definitions

Field Name	Definition
Screen title	Setup Product Group Percent screen
Dept. Name	Your company's department name
Dept.	Your company's department code
Period	Time frame the plan is valid
Store Set	The name of the Store Set applied to the Plan
Store Period	Time frame stores are available to the plan and volume groups
Plan Status	<p>The Plan's status is derived based on the lowest value of any item in a plan:</p> <p>In Progress - default status indicating the plan is currently under development</p> <p>Ready - plan is completed and ready to be reviewed</p> <p>Validated - plan has undergone validation and is now ready to be submitted</p> <p>Submitted - plan has been saved to the database</p> <p>Changed - plan has been submitted and now in changed status to make further edits</p>
Filtered	<p>Indicates with a Yes or No if a Customize Table and/or Product Group filter have been applied. For procedures on how to set and delete a Customize Table filter, see "Customize Table" on page 2-9.</p> <p>For procedures on how to set a Product Group filter, see "Product Groups Drop-Down Field and Show Button" on page 3-6.</p>

2. Store Set drop-down field and Show button and Display fields Section:

This section includes a Store Set drop-down field, Show button, and four display fields:

- Store Set drop-down field and Show button - select the subset from the drop down list. Once selected, click the Show button and you are now able to view important budget information for the selected store set according to the available product groups listed in the product group box. You are also able to allocate budget against this subset using the boxes section.
- Display Fields - In the upper right corner of the screen (under the Action buttons), there are four numeric display fields.

Total/Plan - Dollar value for the budget of this plan

Total/Stores - Total count of stores in the plan.

Subset Name (picked from the Store Set Show field)/Plan - Dollar value for that subset.

Subset Name (picked from the Store Set Show field)/Stores - Total count of stores for that subset

3. Box Sections:

This section is located within the lower half of the Setup Product Group Percent screen. Navigate to the white shaded fields to enter percentages.

Notice you are allowed to enter percentages to be applied against reserve and/or product groups.

For more details on how to use these fields, see the following procedures, ["Showing Subsets and Allocating Budget Across Product Groups"](#) on page 5-9.

Showing Subsets and Allocating Budget Across Product Groups

Within a Plan, there may be multiple subsets assigned to the primary Store Set. Follow these procedures to show one or all and then allocate budget dollars to all store sets across product groups:

1. From the Plan Setup section of the Worklist screen, click the **Spread Budget** hyperlink.

The **Setup Product Group Percent** screen appears:

Figure 5-4 The Setup Product Groups Percent Screen.

ORACLE

Main Menu

>

Plan Library

>

Plan Worklist

Help

|

Logout

Setup Product Group Percent

Dept Name:

Casual Knit Bottoms

Dept:

561

Period:

Feb-Jan, 2006

Store Set:

ALL

Store Period:

Feb-Jul, 2006

Plan Status:

In Progress

Filtered:

No

Save

Revert

Done

Store Set

ALL

Show

Plan

Stores

Total: \$10,877,357

152

ALL: \$10,877,357

152

Product Group	Total		Total by Volume Group for ALL												
	%	\$	VG1(4)		VG2(8)		VG3(25)		VG4(31)		VG5(29)		VG6(42)		VG
			%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	
Total VG \$		10877357		140794		113287		102193		82068		63682		47463	
Reserve	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Total Less Reserve	100.0	10877357	100.0	140794	100.0	113287	100.0	102193	100.0	82068	100.0	63682	100.0	47463	100.0
girls	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
teens	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Other	100.0	10877357	100.0	140794	100.0	113287	100.0	102193	100.0	82068	100.0	63682	100.0	47463	100.0

2. Navigate to the Store Set drop-down field.
3. Click the drop-down arrow located to the right of the Store Set drop-down field.

The subsets assigned to the store set display as the drop-down list.

4. Select the **All** Subset option (this will show all subsets).

To show one subset, select the one you are interested in Showing from the list. See Figure 6-6.

Click the **Show** button.

Figure 5-5

ORACLE

[Main Menu](#)
[Plan Library](#)
[Plan Worksheet](#)

[Help](#)
[Logout](#)

Setup Product Group Percent

Dept Name:

Lightweight T-Shirts

Dept:

447

Period:

Dec, 2005-Nov, 2006

Store Set:

STORE_STATE

Store Period:

Jan, 2005-Mar, 2006

Plan Status:

In Progress

Filtered:

No

Save

Revert

Done

Store Set

QC

▼

Show

Plan

Stores

Total: \$6,366,670

32

QC: \$1,805,806

8

QC

▼

AB

ON

NS

NB

BC

Group

Total

%

\$

Total by Volume Group for QC

VG2(1)

VG3(3)

VG4(4)

%

Avg \$ per Store

%

Avg \$ per Store

%

Avg \$ per Store

1805806

288001

256885

186788

Reserve

0.0

0

0.0

0

0.0

0

0.0

0

Total Less Reserve

100.0

1805806

100.0

288001

100.0

256885

100.0

186788

Other

100.0

1805806

100.0

288001

100.0

256885

100.0

186788

Note: By selecting and showing the ALL option from the Store Set drop-down list you are now able to allocate budget across all subsets equally by selected product groups.

5. Navigate to the **Total by Volume Group** box.

Enter the budget dollars for all store sets by entering percentages for one or all of the product groups listed on the screen. You must enter the amount as a percent. Once you type in the percentage, the system automatically calculates:

- Total percent
- Total dollars

6. Enter 0% in the Reserve field within the Total by Volume Group box if you do not want to set aside a percentage of your budget for future use.

Enter 0% in any of the product groups listed for which you do not want to allocate budget dollars.

When finished entering the percentages across one or all of the product groups, click the **SAVE** button.

These dollar values are now allocated to the relevant product groups and Items.

7. Click the **Done** button to return to the Plan Worklist screen.

Allocating Reserve Budget

Due to the need to put aside budget for future use, you may be interested in using the Reserve Dollars option within the Setup Product Group Percent screen. Follow these procedures to allocate reserve dollars to a selected plan:

1. From the Plan Setup section of the Worklist screen, click the **Spread Budget** hyperlink.

The Setup Product Group Percent screen appears.

2. Navigate to the Store Set drop-down field.
3. Click the drop-down arrow located to the right of the Store Set drop-down field.
The subsets assigned to the store set will display as the options in the list.
4. Click either a specific subset from the list or select All for all subsets. Click the Show button.

Note: By selecting and showing the ALL option from the Store Set drop-down list shows budget dollars for all store sets and their subsets. Selecting a subset from the list shows specific subset information.

5. Navigate to the Total by Volume Group box and locate the Reserve% field. This is the field used to set aside budget dollars for reserve.

Enter the amount as a whole percent. Once you type in the percentage, the system automatically calculates:

- Total percent
- Total dollars

Figure 5–6

ORACLE® Main Menu > Plan Library > Plan Worklist

Setup Product Group Percent Dept Name: Lightweight T-Shirts Dept: 447 Period: Dec, 2005-Nov, 2006 Store Set: STORE_STATE

Store Set:

Product Group	Total		Total by Volume Group for QC					
	%	\$	VG2(1)		VG3(3)		VG4(4)	
			%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store
Total VG \$		1805806		288001		256885		186788
Reserve	0.0	0	0.0	0	0.0	0	0.0	0
Total Less Reserve	100.0	1805806	100.0	288001	100.0	256885	100.0	186788
Other	100.0	1805806	100.0	288001	100.0	256885	100.0	186788

6. Enter 0% in the Reserve field within the Total by Volume Group box if you do not want to set aside a percentage of your budget for future use.

Enter 0 or a percentage in any of the product groups listed if you do or do not want to allocate budget dollars across that Product Group.

When finished entering the percentages within the Reserve% field, click the **SAVE** button.

The reserve dollar values are now allocated to the associated product groups and Items.

7. Click the **Done** button.

The Plan Worklist screen appears.

Setting Up Items

The **Item Setup** section on the **Plan Worklist** screen contains a list of valid actions that you can perform on an item or group of items from the selected plan. The screen provides descriptive data about every item contained in the plan and allows you to add, delete, validate, or copy and paste item attributes.

Plan Worklist Dept Name: Casual Woven Shorts Dept: 547 Period: Dec, 2006-Nov, 2007 Store Set: ALL Store Period: Dec, 2006-May, 2007 Plan Status: In Progress Filtered: No Save Revert Done

Plan Setup [Store Set: ALL](#) **Plan Review** [Assortment View: 3 Items](#)
[Product Group: 2 Defined](#) [Item View: Available](#)
[Spread Budget](#) [Flow View: Available](#)

Item Setup

Action: ((select action)) Apply Product Groups: All Show Copy from Selected Paste to Selected 3 Items 2 Items Actualized

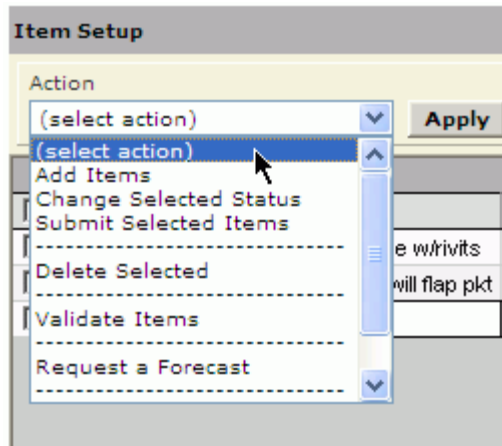
Item Info				Status	Hierarchy Info			Required Info			
Item ID*	Description	Purch Type	Colors	Actualize AP	Sub-Department	Class	Sub-Class	Product Group	Cost*	Retail*	IM
208013	Stretch twill skoote whirvits	F	3	Actual	01 Core Casual	03 Skorts	01 Stretch Twill	test	11.25	39.99	71
644490	short ctn peach twill flap pkt	F	4	Actual	01 Core Casual	01 Structured	06 Other	test	8.55	34.99	76
afd	afdf	F	0	Mock	01 Core Casual	02 Pullons	06 Sugar Bag	test	12.00	23.00	47

This chapter includes the following sections:

- Using Action list
- Using Product Group show
- Using Copy from Selected / Paste to Selected buttons
- Using Display Box
- Understanding Item Grid

Using the Action List

The **Action** drop-down list on the **Item Setup** section enables you to execute actions for creating, reviewing, and modifying item data. You can select an item or a group of items from your worklist, select an action you wish to perform, then click **Apply** to proceed with the desired task.



The **Actions** drop-down list includes:

- Add Items
- Change Selected Status
- Submit Selected Items
- Delete Selected
- Validate Items
- Request a Forecast
- Customize Table
- Print or Export

Adding Items

Once you have created a plan, the next step is to add items to the **Plan Worklist**. The **Add Items** screen develops an assortment of items by adding mock items to the plan at the style or color level.

To add items to the worklist:

1. On the **Main Menu**, click **Planning**.
The **Plan Library** screen appears.
2. Click the name link of a plan to select from **PlanLibrary**.
The **Plan Worklist** comprising of **Plan Setup**, **Plan Review** and **Item Setup** sections appear.
3. Click the down arrow on the **Action** drop-down list of **Item Setup**, select **Add Item**, and click **Apply**.
The **Add Items** pop-up screen appears.

4. Click **Cancel** to exit out of the **Add Items** pop-up screen if you do not wish to add any items.
5. Enter the number of items you want to add in the **Number of items to be added to plan** field, then click **Add Items**.

One blank row will display for each new item you added in the **Plan Worklist**.

6. Enter the appropriate data in the various fields of the grid for each new item.
The fields to be entered are Item ID, Description, Purch Type, Colors, Hierarchy Info, and Required Info (IMU column in Required Info is a calculated field).

Note: The Required Info fields are configurable as per user requirements.

After entering the required information, click **Save**. The new entries are added to your **Plan Worklist** and you may continue working. If you are finished working with your **Plan Worklist**, click **Done**.

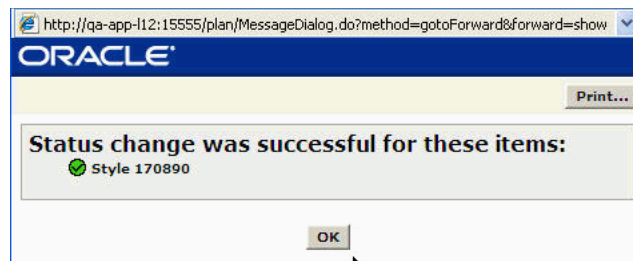
Changing Selected Item Status

You can change the status of items in your plan after you finish making any additions or modifications and you are satisfied with the parameters.

To change the status of selected items in your plan:

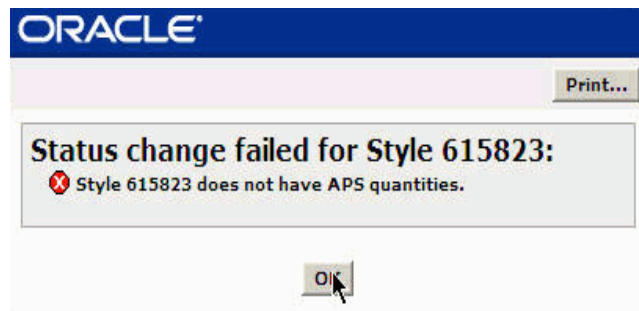
1. On the **Main Menu**, click **Planning**.
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.
The **Plan Worklist** of the plan you selected appears.
3. Click the checkbox of the item(s) you want to change status.
4. Click the down arrow on the drop-down **Action** list, select **Change Selected Status**, then click **Apply**.
The **Change Status** window appears.

5. Click the down arrow on the **New AP Status** drop-down list, select a new AP status from the following choices:
 - **No Change** indicates that no changes have been made.
 - **In Progress (I)** indicates that the item is being edited and is not yet complete.
 - **Ready (R)** indicates the item is ready for review.
 - **Validated (V)** indicates that the item data is completed validated.
 - **Changed** indicates the Submitted Items status is changed.
6. When you have finished, click **Change Status**.
 If the change was successfully done, a pop-up window appears displaying that the change was done successfully.



The item's status is changed to the current status in the **Status** column.

If there are validation errors, a pop-up window displays change status request failed validation and the reasons for it as shown in the figure below.



7. Click **OK** and complete the required criteria to change status.

Status change requests can be implemented only when all required criteria on the **Plan Worklist** has been entered properly. If no failures are reported, the change is recorded in the **Status** column.

Submitting Selected Items

You can submit item(s) after all the required criteria is completed without any validation errors. After you have successfully submitted the item, the status is changed to **Submitted** and the item is eligible to interface with external systems. If there are validation errors, the item can not be submitted and a pop-up message appears displaying the reason for the failure.

The AP data segment is read-only for the submitted item, and the LSP or Last Submitted Plan data segment is overwritten with the current AP quantity.

If you wish to make any changes to a submitted item, you must change the item's status to **Changed** to bring the AP segment back to an editable status.

To submit an item:

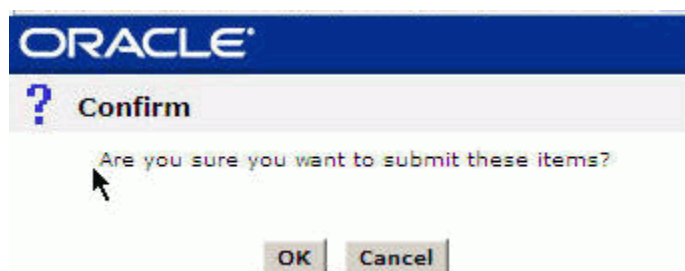
1. On the **Main Menu**, click **Planning**.

The **Plan Library** screen appears.

2. Click the name link of a plan to select it from the **Plan Library**.

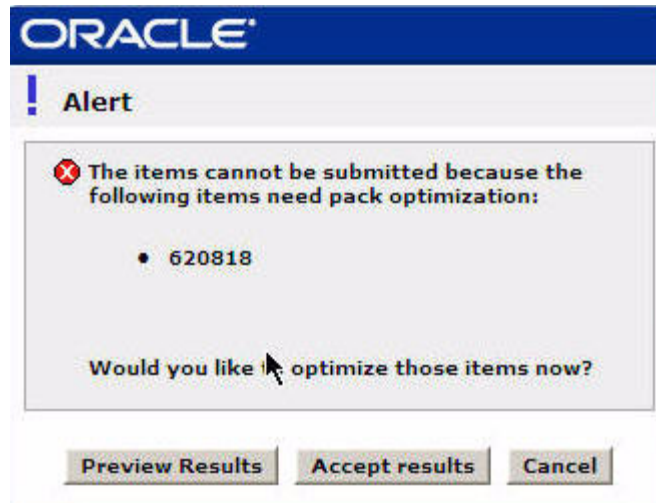
The **Plan Worklist** of the plan you selected appears.

3. Click the checkbox of the item(s) you want to submit.
4. Click the down arrow on the drop-down **Action** list, select **Submit Selected Items**, and click **Apply**. A confirmation pop-up window appears.



5. Click **OK** to submit the item(s) or click **Cancel** to revert the action.

If there are no validation errors, the item(s) is submitted. If there are validation errors, like pack optimization or buy parameters not completed, an alert pop-up window displaying the reason for the validation failure appears.



6. Click **Accept Results** to optimize the items or **Cancel** to revert.

Clicking **Accept Results** overwrites the AP quantities with results of pack optimization. Clicking **Preview Results** runs pack optimization and allows you to see the results in the AP view prior to overwriting the AP quantities. Pack optimization results must be accepted before an item can be submitted. After you submit the item, the status is changed to **Submitted** and the item is eligible to interface with external systems.

Deleting Selected Items

You can delete item or items from the **Plan Worklist**.

To delete items from your Plan Worklist:

1. On the **Main Menu**, click **Planning**.
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.
The **Plan Worklist** of the plan you selected appears.
3. Click the checkbox next to the item(s) whose status you want to delete.
4. Click the down arrow on the **Action** drop-down list, select **Delete Selected**.
A warning prompt appears asking to confirm your request.
5. Click **Ok** to confirm to delete the selected items. The items are deleted from the **Plan Worklist**. Or, click **Cancel** to cancel your request.

Validating Items

The Common Item Setup (CIS) system, which contains the master list of products, must be consistent with the plan. The **Validate Item** function validates the actualized items with the item setup information.

To validate the consistency of information related to actualized items on the Plan Worklist:

1. On the **Main Menu**, click **Planning**.

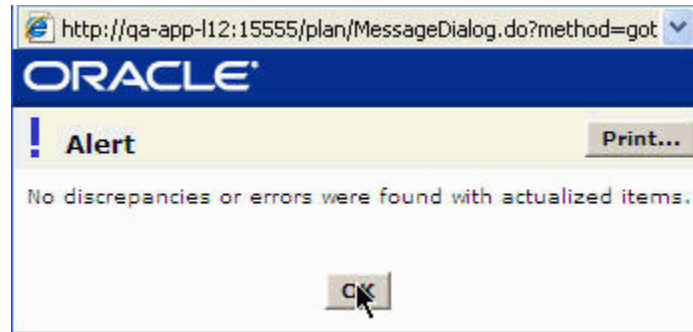
The **Plan Library** appears.

2. Click the name link of a plan to select it from the **Plan Library**.

The **Plan Worklist** screen appears.

3. Click the checkbox next to the item(s) for which you wish to validate the items.
4. Click the down arrow on the **Action** drop-down list, select **Validate Item**, and click **Apply**.

If there are no discrepancies or errors, a pop-up window appears on the screen informing that there are no errors in the actualized items.



5. Click **OK** or **Print** to print the report.

Requesting Forecast

You can generate /regenerate a forecast for a selected item based on buy parameters. The Request Forecast popup window shows details of forecast request, any errors, and status of any pending forecast requests for the item.

To request a forecast for selected items:

1. On the **Main Menu**, click **Planning**.

The **Plan Library** screen appears.

2. Click the name link of a plan to select it from the **Plan Library**.

The **Plan Worklist** screen appears.

3. Click the checkbox next to the item(s) for which you wish to generate the forecast.
4. Click the down arrow on the **Action** drop-down list, select **Request a Forecast**, then click **Apply**.

The pop-up window displays the forecast request, any errors, or status of any pending forecast.

ORACLE Main Menu > Plan Library > Plan Worklist

Request Forecast	Dept Name:	Dept:	Period:	
	Basic T-Shirts	802	11, 2006-10, 2007	Print OK

A forecast request has not been sent for the following item(s)

- Item 615823: buy parameters are incomplete

- Click **OK** to continue, or click **Print** to print the report.

If the selected item already has a generated forecast, a pop-up window informs that a forecast may not be necessary for this item.

ORACLE Main Menu > Plan Library > Plan Worklist

Request Forecast	Dept Name:	Dept:	Period:	
	Mens Casual Pants	442	Dec, 2005-Nov, 2006	Print Run Forecast Cancel

A forecast request may not be necessary for the following item(s). If you wish to re-run the forecast anyway, please select the item(s) and click Run Forecast.

☐ Item 1 has a valid forecast from 3/23/06 5:33 PM.

- If you wish to re-run the forecast, select the item and click **Run Forecast**.

While the system generates the forecast, the status of the **Forecast** column is displayed as **Pending**. After generating the forecast, the **Forecast** column status changes to **Complete**.

Customizing Table

The customize table functionality allows you to customize display of data in the **Plan Worklist** screen. You can perform multiple sorts, show /hide columns, re-order columns and filters.

To customize the table:

- On the **Main Menu**, click **Planning**.
The **Plan Library** screen appears.
- Click the name link of a plan to select it from the **Plan Library**.
The **Plan Worklist** screen appears.
- Select the item for which you wish to modify the table.
- In the **Item Setup** section, click the down arrow on the **Action** drop-down list, select **Customize Table**, and click **Apply**.

The Customize Table screen appears.

5. Select from the **Sort Table**, **Filter Table**, or **Change Columns** to customize your table.
 - **Sort Table** - You can sort in ascending or descending order and in different column orders.
 - **Filter Table** - You can filter column data by setting your criteria, add a new filter or delete an existing filter. Any number of filters can be added.
 - **Change Columns** - You can re-order columns, hide/show columns, or move/up any existing column. Columns that have stars (*) cannot be hidden.
6. Click **Done** to save the changes, or click **Cancel** to revert the changes.

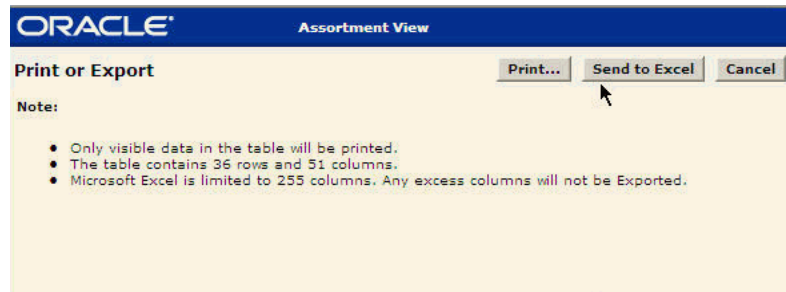
Printing / Exporting Data

You can print or export the item data using the **Print or Export** functionality.

To print or export data:

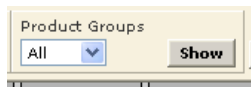
1. On the **Main Menu**, click **Planning**.
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.
The **Plan Worklist** screen appears.
3. Select the item for which you wish to print or export data.
4. In the **Item Setup** screen, click the down arrow on the **Action** drop-down list, select **Print or Export**, then click **Apply**.

The Print or Export window appears noting the number of columns and rows that are visible.



5. Click **Print** if you wish to take a print document of the screen, or, click **Send to Excel** if you wish to send the data to an Excel sheet.
6. Click **Cancel** to revert.

Using Product Group Show



The product group **Show** section of the **Item Setup** screen enables you to filter the item data based on product groups in the plan setup. You can choose to display in the grid the various defined product groups for the selected items in the plan.

The product groups are user-specific and can be defined during the Plan setup level.

Using Copy from Selected / Paste to Selected Buttons

The **Copy from Selected / Paste to Selected** buttons on the **Item Setup** section allows you to copy the selected item attributes and paste the attributes to destination item(s). This helps to avoid duplication of adding item attributes to the newly created items. If the items are similar, the attributes can be easily copied from the existing items.

Coping from Selected Items

The **Copy from Selected** button enables you to copy the item attributes like item information, hierarchy, client information or the buy parameters of the chosen items to the destination items from the **Copy Item** pop-up window.

ORACLE Main Menu > Plan Library > Plan Worklist

Copy Item Copy Cancel

Select the fields to copy from the chosen item to the destination items.

<input checked="" type="checkbox"/> Item Info	<input checked="" type="checkbox"/> Hierarchy Info	<input checked="" type="checkbox"/> Required Info	<input checked="" type="checkbox"/> Optional Info	<input checked="" type="checkbox"/> Client Info	<input type="checkbox"/> Buy Parameters
<input checked="" type="checkbox"/> Description	<input checked="" type="checkbox"/> Sub-Department	<input checked="" type="checkbox"/> Product Group	<input checked="" type="checkbox"/> Brand	<input checked="" type="checkbox"/> Fabric	<input type="checkbox"/> Like Item
<input checked="" type="checkbox"/> Purch Type	<input checked="" type="checkbox"/> Class	<input checked="" type="checkbox"/> Cost*	<input checked="" type="checkbox"/> Collection	<input checked="" type="checkbox"/> Fabric Characteristics	<input type="checkbox"/> Store Base
	<input checked="" type="checkbox"/> Sub-Class	<input checked="" type="checkbox"/> Retail*	<input checked="" type="checkbox"/> Color Family	<input checked="" type="checkbox"/> Features	<input type="checkbox"/> Store Flow
		<input checked="" type="checkbox"/> Pack*	<input checked="" type="checkbox"/> Floor Set	<input checked="" type="checkbox"/> Fit	<input type="checkbox"/> Pricing Plan
		<input checked="" type="checkbox"/> Min*	<input checked="" type="checkbox"/> Notes	<input checked="" type="checkbox"/> Lifestyle	<input type="checkbox"/> DC Flow
		<input type="checkbox"/> Pres Min*	<input checked="" type="checkbox"/> Season Code	<input checked="" type="checkbox"/> Neck	
			<input checked="" type="checkbox"/> Size Range	<input checked="" type="checkbox"/> Reg/Petite/Tall	
			<input checked="" type="checkbox"/> Supplier	<input checked="" type="checkbox"/> Rise/Sleeve	
				<input checked="" type="checkbox"/> Theme Code	
				<input checked="" type="checkbox"/> Theme Name	

To copy from selected items:

1. On the **Main Menu**, click **Planning**.
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.
The **Plan Worklist** screen appears.
3. Click the checkbox next to the item for which you wish to copy the item attributes.
You can only copy from a single item or color. If you have selected two items, a pop-up alert window suggests selecting only one item and trying again.
4. Click the **Copy from Selected** button.
The **Copy Item** pop-up window appears displaying the item data that can be copied to other items.
5. Select the fields by checking the checkbox.
6. Click **Copy**. Or, if you wish to revert the changes, click **Cancel**

Pasting to Selected Items

The **Paste to Selected** button is the next step to **Copy from Selected**. The item information copied is pasted to selected items.

To paste to selected items:

1. On the **Main Menu**, click **Planning**.
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.
The **Plan Worklist** screen appears.
3. Click the checkbox next to the item for which you wish to paste the copied item attributes.
4. Click the **Paste to Selected** button.
The copied fields are copied to the destination items.

Using Display Box

The display box on **Item Setup** displays the total number of items and the number of actualized items in the Plan.

Understanding Item Grid

Item View grid has columns

Table 6–1 *Item grid fields and description*

Column Heading	Description
Item Info	
Item ID	Actual or mock item number
Description	Item description
Type	Displays the item type - <ul style="list-style-type: none"> ■ F - Fashion ■ B - Basic ■ V - VMI
Colors	Number of item colors in the plan and the number (for example 12) hyperlinks to Color pop-up to add colors.
Status	
Actualize	Mock or actual item
AP	Item Status: <ul style="list-style-type: none"> ■ I - In Progress ■ R - Ready ■ V - Validated ■ S - Submitted ■ C - Changed
Hierarchy Info	
Sub-Department	Sub-departments within the plan department
Class	Class within the Sub-Department. You must select Sub-Department first.
Subclass	Sub-Class within the Class. You must select Class first.
Required Info	
Product Group	Product group of the item.
Cost	Initial Cost of the item.
Retail	Initial Retail cost of the item.
IMU	Calculated value based on Cost and Retail (1 - Cost/Retail).
Pack	Approximate size of an average prepack for an item.
Min	Minimum receipt quantity per store for an item for the plan period. Min is for all stores, but can be set at a store grade or the primary store set level on the Assortment View .

Table 6–1 (Cont.) Item grid fields and description

Column Heading	Description
Pres Min	Presentation Minimum. It refers to the initial presentation quantity to support the item setup stores. Pres Min is for all stores, but can be set at the store grade or the primary store set level on the Assortment View .
Optional Info	
Brand	Brand name of the item.
Supplier	Supplier for the item.
Collection	Name of the collection of the item.
Size Range	Current distinct size ranges for a department.
Floor Set	Current distinct size ranges for a department.
Color Family	Color group of the item.
Season code	Indicates the fiscal month when you want to start selling the item. Need default values for Season code: Spring, Summer, Fall Holiday, Carry Through.
Attributes 1-5	User Defined Attribute used for sorting, filtering, and mix reporting.
Notes	Need default values for notes
Client Info	
Fabric	Fabric value as determined by user.
Fit	Fit value as determined by user.
Rise/Sleeve	
Fabric Characteristic	Any specific information about the fabric.
Reg/Petite/Tall	
Lifestyle	
Features	
Neck	
Theme Codes	Collection of items to be planned and displayed together.
Theme Name	
Buy Parameters	
Like Item	Indicates if the Like item is set for the item.
Store Base	Indicates if the eligible stores for the plan are selected.
Store Flow	Indicates if the store item flow is defined.
Pricing Plan	Indicates if the pricing strategy for the item is done.
DC Flow	Indicates if the DC flow is completed.
Forecast	Indicates the forecast status for the item <ul style="list-style-type: none"> ■ Completed ■ Pending ■ Failed ■ Invalid

Table 6–1 (Cont.) Item grid fields and description

Column Heading	Description
Pack Configs	Indicates if the Pack configuration for the item is completed or not. Only if the items are actualized, you can view the pack configuration of the item by clicking on the View status in the Pack Configs column.

Buy Parameters

Buy Parameters helps you define merchandising, forecast, and flow parameters that drive the bottom up forecast and receipt flow for an item or a group of items.

This chapter describes how you can define Buy Parameters for a planned item, and preview the forecast results using the Calculate What-If feature.

To access the Buy Parameters screen:

- On the Plan Workflow bar, click Define Buy Parameters in the Set up Items section.

The Buy Parameter screen appears with the following tabs:

- Like Item
- Store Clusters
- Store Flow
- Pricing Plan
- DC Flow

Like Item Tab

Use the Like Item tab to associate an item(s) to an item or a group of items with similar characteristics. This action in turn helps you drive the product lifecycle curve (PLC) for the forecast. You can select the like item based on the items past performance at stores.

The forecast for an item consists of the following elements:

- Shape (product lifecycle curve) – select a like item to drive the product lifecycle curve.
- Scale (magnitude of demand) – adjust like item parameters to adjust overall sales volume.

Like Item Screen

Here are the fields that appear on the Like Item tab:

Table 7–1 Like Item Tab Fields

Field	Description
Like Item	The identification number of the Like item.
Description	The description of the Like item.
Item Info Section	
Group [Department]	The identification number of the department.
Subdepartment	The identification number of the subdepartment.
Purch Type	Indicates the purchase type, where: <ul style="list-style-type: none"> ■ K - Key ■ F - Fashion ■ B - Basic

Table 7-1 (Cont.) Like Item Tab Fields

Field	Description
Retail	The retail price of the item.
Cost	The cost price of the item.
IMU	Indicates the initial markup unit (IMU) for the item. IMU is the ratio of retail price to the cost price of the item.
Season Code	Indicates the fiscal month when you want to start selling the item.
Floor Set	The identification number of the sub-season (such as early spring or late spring) when you want to introduce the item on the floor.
Size Range	Indicates the size of the item.
Vendor	Indicates the name of the vendor.
Vendor Style	The identification number of the style that the vendor specifies for the item.
Prod Type	Indicates the product group.
Origin	Indicates the origin of the item (Domestic or Import).
Alloc	Indicates an automated replenishment of the item.
#Stores	Number of stores with sales or receipts.
Receipts Section	
Rcpt Units	Receipt units for the item in the allocated stores.
Avg Rcpt Units	Average receipt units in each store.
Rcpt \$	Receipt value (in dollars) for the item in the allocated stores.
Avg Rcpt \$	Average receipt value (in dollars) for the item in each store.
Receipt AUR	Average unit retail (AUR) for the item. AUR, a widely used performance metric, indicates the average price at which an item is sold.
Sales Section	
Sales Units	Number of units sold in the allocated stores.
Avg Sales Units	Average number of units sold in each store.
Sales \$	Sales (in dollars) for the item in the allocated stores.
Avg Sales \$	Average sales (in dollars) for the item in each store.
Markdowns Section	
MD \$	Markdown (in dollars) in the store.
Avg MD \$	Average markdown (in dollars) in the allocated stores.
Perm MD \$	Permanent markdown (in dollars) in the store.
Avg Perm MD \$	Average permanent markdown (in dollars) in the allocated stores.
POS MD \$	Markdown (in dollars) at the point of sale (POS).
Avg POS MD \$	Average markdown (in dollars) at the point of sale (POS) at the allocated stores.

Table 7–1 (Cont.) Like Item Tab Fields

Field	Description
Perm MD Sales Section	
Perm MD Sales Units	Number of units sold with permanent markdown at the store.
Avg Perm MD Sales Units	Average number of units sold with permanent markdown at the allocated stores.
Perm MD Sales \$	Sales (in dollars) for the item in the store, after the permanent markdown.
Avg Perm MD Sales \$	Average sales (in dollars) for the item in the allocated stores, after the permanent markdown.
POS Sales Section	
POS Sales Units	Number of units sold at the point of sale.
Avg POS Sales Units	Average number of units sold at the point of sales in the allocated stores.
POS Sales \$	Sales (in dollars) for the item at the point of sale.
Avg POS Sales \$	Average sales (in dollars) for the item at the point of sales in the allocated stores.
Gross Profit Section	
GP \$	Gross profit for the item at the store.
Avg GP \$	Average gross profit for the item at the allocated stores.
GP%	Percentage of gross profit for the item.
Lifecycle Section	
First Rcpt Dt	Date of the first receipt.
Planned OOS Dt	Planned out of stock date for the item.
Selling Weeks	Number of weeks the item sold.
Aggregation Dates Section	
Start	Date when the aggregation starts.
End	Date when the aggregation ends.
Style	Enter a weight (at item or color level) for the Like item based on the similarity between the planned item and liked item. Forecast generates at the item or color level, based on the level at which you map the like item. If you choose to develop a color-level forecast for any of the colors, you must map each color of the planned item to a like color from history.

Accessing the Like Item Tab

To access the Like Item tab:

1. On the **Main Menu**, click **Planning**. The **Planning Library** screen appears.
2. In the **Plan** section, under **Name**, click the plan you want. The **Plan Worklist** screen appears.
3. In the **Buy Parameters** section, click the value in the **Like Item** field for the item you want. The **Like Item** tab appears on the **Buy Parameters** screen.

Adding Like Items

To add like items for a planned item:

1. On the **Like Item** tab, select **Add Like Item** in the **Action** field.
2. Click **Apply**. The **Add Like Item** screen appears.
3. In the **Find Item** section, select an applicable search criterion.
4. Click **Find**. Records of items that match your search criteria display in the **Search Results** section.
5. Select the like item you want, and then click **Add Selected Like Item** button.
6. On the **Like Item** grid, you can now associate the like item information at the item or the color level.
7. If you add more than one like item, you can weigh each like item proportionately based on the similarity between the like items and planned item. For example, you might want to think that this year's Capri pants will sell 80% like last year's Capri pant and 20% like another pant style.
8. Once you weigh the planned item based on the like items, you can scale the item's sales forecast up or down based on the expected performance and the past performance of the like item. To scale the item's sales forecast, enter an applicable value in the **Adjust Sales Volume** field.

Important: In the **Adjust Sales Volume** field, a value 100 indicates that the item will sell the same as the previous year's volume of a like item. A value 125 indicates that the item will sell 25% more than last year's sales volume of a like item. A value 75 indicates that the item will sell 25% less than last year's sales volume of a like item.

9. Click **Save**.

Removing Like Items

To remove the like items:

1. On the **Like Item** grid, select the items you want.
2. Under **Action**, click **Remove Selected Like Item**, and then click **Apply**.

Store Base Tab

Use the Store Base tab to determine the stores eligible for the forecast. You can set a planned store base for an item based on whether the item is targeted for all stores, specific store grades, specific store subsets, or an intersection of store grades and store subsets.

Store Base Tab Screen

ORACLE

Main Menu > Plan Library > Plan Worklist > Buy Parameters

About | Help | Logout

Buy Parameters

Dept Name: Denim Shorts

Dept: 549

Period: Dec, 2005-Nov, 2006

Store Set: ALL

Store Period: Dec, 2005-May, 2006

Filtered: No

Calculate What-If

Save

Revert

Done

Edit Selected

Show All

Item Info

Item ID

Description

Purch Type

Colors

Buy Parameters

Like Item

Store Base

Store Flow

Pricing Plan

DC Flow

Forecast

1001

Item1

F

2

done

done

done

done

done

Complete

Like Item

Store Base

Store Flow

Pricing Plan

DC Flow

Storesets

ALL

Show

Set to AP Store Base

Item ID

Description

Need

AP Stores

Need

AP Stores

Need

AP Stores

STORES

Store Subset ALL

1001 Item1

VG6(2)

VG7(43)

VG8(106)

151

Store Subset RemainingSubset

1001 Item1

VG6(0)

VG7(0)

VG8(0)

0

Here are the fields that appear on the Store Base tab:

Table 7-2 Store Base Tab Fields

Field	Description
Item ID	The identification number of the item.
Description	The description of the item.
Need	Number of eligible stores that will receive the item.
AP Stores	Number of stores that have AP quantities (specified in the active plan).
STORES	Number of eligible stores in the store subset.

Accessing the Store Base Tab

To access the Store Base tab:

1. On the **Main Menu**, click **Planning**. The **Planning Library** screen appears.
2. In the **Plan** section, under **Name**, click the plan you want. The **Plan Worklist** screen appears.
3. In the **Buy Parameters** section, click the value in the **Store Base** field for the item you want. The **Store Base** tab appears on the **Buy Parameters** screen.

Setting Up Stores to Receive Items

To set up stores to receive items:

1. On the **Store Base** tab, click the check box next to the item for store grades you want. To view the number of stores you select, see the **STORES** field.

Or

To select all stores in a store subset, click the check box next to the store subset you want.

Or

To select the stores, store grades, or intersection of store grades and store subsets with AP quantities (set in Assortment View), click **Set to AP StoreBase**.

2. Click **Save**.

Store Flow Tab

Use the Store Flow tab to define the selling period for an item. You can set the in store dates and out of stock dates for the item you want in all stores or set specific dates by store subsets. You can also define the frequency of store deliveries to drive the receipt plan.

The Store Flow algorithm determines the coverage period for each delivery based on the delivery frequency. For each delivery, the algorithm sums up the weeks of supply needed for the coverage period, the safety stock (set up in the Business Rule Process Manager), and the minimum presentation quantity.

Store Flow Screen

Here are the fields that appear on the Store Flow tab:

Table 7–3 Store Flow Tab Fields

Field	Description
Item ID	The identification number of the item.
Description	The description of the item.
In Stores	Date when the item will be in stores.
Out of Stock	Date when the item will go out of stock.
Last Receipt Date	Date after which the store will not receive any more receipts from the distribution center.

Accessing the Store Flow Tab

To access the Store Flow tab:

1. On the **Main Menu**, click **Planning**. The **Planning Library** screen appears.
2. In the **Plan** section, under **Name**, click the plan you want. The **Plan Worklist** screen appears.
3. In the **Buy Parameters** section, click the value in the **Store Flow** field for the item you want. The **Store Flow** tab appears on the **Buy Parameters** screen.

Setting Up a Selling Period for an Item

To set up a selling period for an item:

1. On the **Store Flow** tab, select the delivery period in the **Deliveries** field.
2. For each item or item color type, enter applicable dates in the **In Stores**, **Out of Stock**, and **Last Receipt Date** fields.

Printing or Exporting Store Flow Information

To print or export the information on the Store Flow tab:

- In the **Action** field, click **Print or Export**.

Pricing Plan Tab

Use the Pricing Plan tab to define the pricing strategy of an item or a group of items, and then derive forecast to observe the sales lift and gross margin impact from planned promotions and markdowns.

If you do not want to add any pricing events, click the Pricing Plan Complete check box to indicate that the pricing plan is complete (required to generate the forecast). You can now preview the forecast results, and then generate the forecast.

Pricing Plan Tab Screen

The Pricing tab consists of the following two frames:

- Add Promotion or Markdown
- Pricing Plan Grid

Here are the fields that appear on the Add Promotion or Markdown frame:

Table 7–4 Add Promotion or Markdown Frame Fields

Field	Description
Choose	Select whether you want to add a promotion or a markdown.
Required Fields Section	
Type	Select the type of promotion or markdown.
Ad Name	Type a name for the promotion.
Start	Select an applicable start date for the promotion.
End	Select an applicable end date for the promotion.
Amount	Type the amount or percentage waived.

Table 7–4 (Cont.) Add Promotion or Markdown Frame Fields

Field	Description
Apply To Section	
Ad Group	Select the stores by advertisement group you want for the plan.
Colors	Select the colors you want to include in the promotion.
Optional Fields Section	
Ad Emphasis	Select the type of publicity.
Media Type	Select the medium for the promotion.
Page Indicator	Indicates the place (front or back of a page) where you want to print the information on the promotion.

Note: The **Apply To** and **Optional Fields** sections appear when you choose to add a promotion.

Here are the fields that appear on the Pricing Plan Grid:

Table 7–5 Pricing Plan Grid Fields

Field	Description
Type	Indicates the type of promotion.
Period Section	
Start	Date when the promotion starts.
End	Date when the promotion ends.
Name	Name of the promotion.
Details Section	
Amount	Indicates the amount or percentage waived for the promotion.
Offer	Indicates the type of waiver.
Ad Group	Indicates the stores by advertisement group for the plan.
Emphasis	Indicates the colors you want to include in the promotion.
Media	Indicates the medium of promotion.
Page	Indicates the place (front or back of a page) where you want to print the information on the promotion.
Style Section	
Price	Price of the item after the promotion.
Colors	Price of the colors (of the item) after the promotion.

Note: The AUR adjustment factor (appears on the right hand corner of the Pricing Plan frame) is configured to account for point-of-sale (POS) promotions, employee discounts, or any other unplanned discounts taken directly at the POS terminal. This factor affects the sales and gross margin metrics. You can configure this factor in the Business Rule Processing Manager (BRPM) module.

Accessing the Pricing Plan Tab

To access the pricing plan tab:

1. On the **Main Menu**, click **Planning**. The **Planning Library** screen appears.
2. In the **Plan** section, under **Name**, click the plan you want. The **Plan Worklist** screen appears.
3. In the **Buy Parameters** section, click the value in the **Pricing Plan** field for the item you want. The **Pricing Plan** tab appears on the **Buy Parameters** screen.

Adding Promotional Events and Markdowns

To add promotional events and markdowns:

1. On the **Pricing Plan** tab, under the **Add Promotion or Markdown** frame, select **Promotion or Markdown** in the **Choose** field.
2. Enter applicable information in the **Required fields** section.
3. You can also enter additional information on the promotion in the **Optional fields** section.
4. Click **Add Pricing Event**. The promotion or markdown event appears in the **Pricing Plan** grid.
5. Repeat steps 1-4 to add more promotional events and markdowns.

Note: If no pricing plan applies to the item, click the **Pricing Plan Complete** check box.

6. Click **Save**.

DC Flow Tab

Use the DC Flow tab to define the number of deliveries to the distribution center (DC) based on the recommended receipt flow. Once you set the other buy parameters, click the Recalculate button to generate optimal shipment dates for each shipment. This also generates a new forecast. You can accept these dates or select the AP User-Defined radio button, and enter the dates you want.

The DC Flow algorithm uses the sum of all store flow needs by week, adds transit time by store/merchandise, and then calculates the optimal number and frequency of deliveries as well as the quantity for each delivery.

DC Flow Tab Screen

Here are the fields that appear on the DC Flow tab:

Table 7–6 DC Flow Tab Fields

Field	Description
Maximum Number of Deliveries	Maximum number of deliveries for the item to the distribution center.
Need System Optimized	Delivery dates set based on the expected forecast for the item.
AP System Optimized	Delivery dates set based on the active plan for the item.
AP User Defined	Delivery dates you want to set for the item.

Accessing the DC Flow Tab

To access the DC Flow tab:

1. On the **Main Menu**, click **Planning**. The **Planning Library** screen appears.
2. In the **Plan** section, under **Name**, click the plan you want. The **Plan Worklist** screen appears.
3. In the **Buy Parameters** section, click the value in the **DC Flow** field for the item you want. The **DC Flow** tab appears on the **Buy Parameters** screen.

Setting Up Deliveries from the Distribution Center

To set up deliveries from the distribution center:

1. On the **DC Flow** tab, enter the number of deliveries in the **Maximum Number of Deliveries** field.
2. Under **AP User-Defined**, enter the deliveries dates you want.

Or

To set up deliveries based on the optimal dates (calculated based on the parameters such as store flow needs and transit time information on the Item View screen), click **Recalculate**.

What-If Calculations

Before you save the buy parameters and generate a forecast, you can use the What-If feature to preview the results for the item based on the sales, receipt, inventory, gross margin by week and month.

Use the Data field to display and compare the need forecast with the actual plan (AP), last submitted plan (LSP), or like item last year (LILY). The AP column displays information based on the AP quantities you have set up in the Assortment View.

What-If Screen

ORACLE® Main Menu > Plan Library > Plan Worksheet > Buy Parameters													
What-If													
Action				Data									
(select action)				Need									
Apply				Show									
Fiscal Week	Sales		Store Receipts		Mark Down			Gross Profit	BOH	Sell Through			
	Need	Need	Need	Need	Need	Need	Need	Need	Need	Need	Need	Need	
	Sales U	Receipt U	Receipt \$	Perm MD\$	POS MD\$	Total MD\$	MD IND	GP%	BOH U	%ST U	%ST \$		
Total	2654	2654	66362	0	1844	1844		58.9	0	100	97.2		
Dec	0	0	0	0	0	0		0.0	0	0	0.0		
44	0	0	0	0	0	0		0.0	0	0	0.0		
45	0	0	0	0	0	0		0.0	0	0	0.0		
46	0	0	0	0	0	0		0.0	0	0	0.0		
47	0	0	0	0	0	0		0.0	0	0	0.0		
48	0	0	0	0	0	0		0.0	0	0	0.0		
Jan	571	1544	38600	0	353	353		59.0	0	37	36.1		
49	79	921	23025	0	48	48		59.0	0	9	8.4		
50	91	0	0	0	56	56		59.0	842	18	18.0		
51	147	0	0	0	90	90		59.0	751	34	33.6		
52	254	623	15575	0	160	160		59.0	604	37	36.1		
Feb	897	437	10925	0	562	562		59.0	973	74	72.3		
1	280	0	0	0	173	173		59.0	973	55	53.7		
2	220	0	0	0	139	139		59.0	694	69	67.6		
3	209	437	10925	0	131	131		59.0	474	65	63.0		
4	189	0	0	0	119	119		59.0	702	74	72.3		
Mar	658	563	14080	0	602	602		58.6	513	84	81.2		
5	172	0	0	0	106	106		59.0	513	83	80.7		
6	135	327	8169	0	84	84		59.0	341	77	75.0		
7	129	0	0	0	81	81		59.0	533	82	80.4		
8	118	0	0	0	265	265 POS		56.4	404	88	85.1		
9	105	236	5911	0	66	66		59.0	287	84	81.2		
Apr	348	105	2618	0	216	216		59.0	418	93	90.8		
10	110	0	0	0	68	68		59.0	418	88	85.4		
11	91	0	0	0	56	56		59.0	308	91	88.9		
12	89	105	2618	0	56	56		59.0	217	91	88.6		

Here are the fields that appear on the What-If screen:

Table 7-7 What-If Screen Fields

Field	Description
Fiscal Week	Fiscal week numbers grouped according to the calendar months.
Sales Section	
Sales U	Sales units for the item in the week.
Store Receipts Section	
Receipt U	Receipt units for the item in the week.
Receipt \$	Receipt amount for the item in the week.
Mark Down Section	
Perm MD \$	Amount of permanent markdown in the week.
POS MD \$	Amount of markdown at the point of sale (POS).

Table 7–7 (Cont.) What-If Screen Fields

Field	Description
Total MD\$	Amount of markdown in the week.
MD IND	Indicates the type of markdown.
Gross Profit Section	
GP%	Percentage of gross profit in the week.
BOH	
BOH U	Beginning On Hand (BOH) units for the week.
Sell Through Section	
%ST U	Percentage of sell through units.
%ST \$	Percentage of sell through dollars.

Previewing a Forecast

To preview a forecast:

- Once you set up the buy parameters, click **Calculate What-If**. The **What-If** window appears.

Note: Once the **What-If** screen is open, you can continue to make changes to the buy parameters. Each time you update the buy parameters, click **Recalculate** (on the What-If screen) to see the updated information.

Extending Time Period

Use the Extend Time Period feature to extend the time period for the forecast and observe the effect on the sales, receipts, and inventory.

To extend the time period:

1. On the **What-If** screen, under **Action**, click **Extend Time Period**.
2. Click **Apply**. The **Extend Time Period** window appears.
3. Enter the applicable start and end dates for the extended period, and then click **OK**.

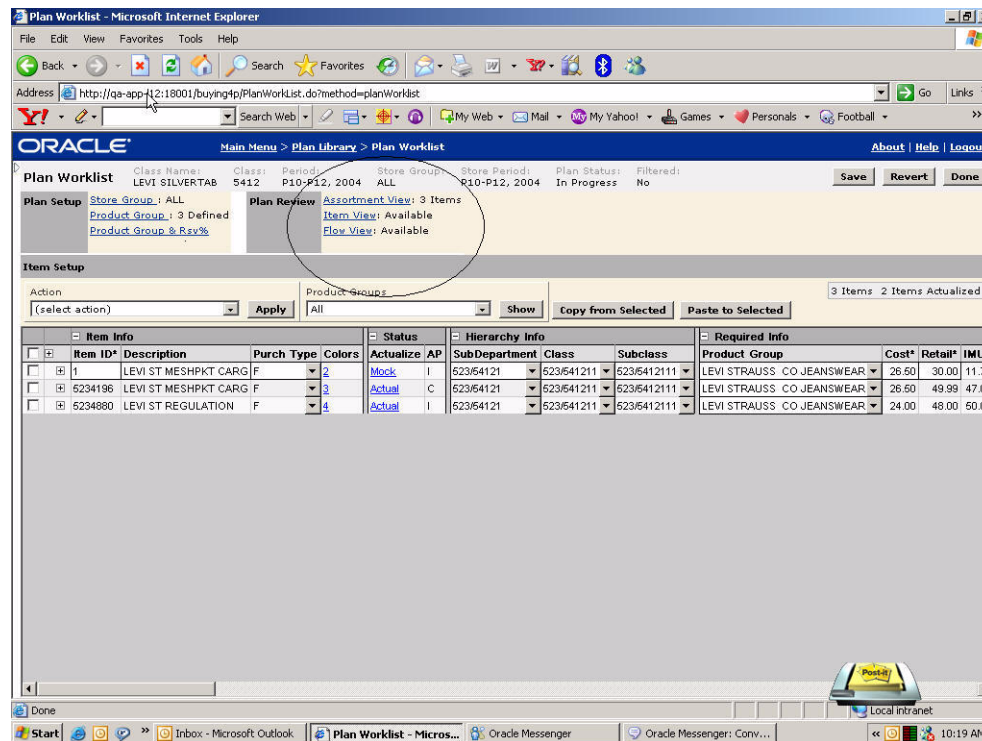
Using Plan Review

The **Plan Review** screen on **Plan Worklist** is a compilation of **Assortment View**, **Item View**, and **Flow View**. The **Plan Review** screen enables you to manage and track plans by access the three views from **Plan Review**.

In the **Assortment View**, you can access and view Active Plan (AP), Last Submitted Plan (LSP), and Need data segments. In the **Item View**, you can view AP, LSP, Like Item Last Year (LILY), and Need data segments, and in the **Flow View**, you can only view the AP data segment.

The different data segments in the Plan application are:

- **Active Plan** or AP - this data segment is the official plan of record populated by the user and represents the data that is submitted to the supplier to determine the purchase quantity of the merchandise.
- **Need** - the data segment is derived by the item's forecast generated by the system. The Need segment is not editable, but can be modified by changing the buy parameters and regenerating a forecast.
- **Last Submitted Plan** or LSP - this data segment represents the last AP that was submitted. You can compare an updated AP segment with the LSP to review any changes to the last plan set to Purchasing.
- **Like Item Last Year** or LILY - This data segment refers to previous year's like item.



The **Assortment View** link displays all the items contained in the plan. The items are grouped by primary store set/volume group. You can view the planned receipts at the item or color level and view data by particular subclasses and subsets in the assortment view. You can manually define and edit receipt quantities for the AP segment.

The **Item View** link displays sales, receipts, inventory, and detailed metrics by week for a particular item, color, or group of items, such as class or subclass. You can view the AP, Need, LILY, and LSP data segments within the screen.

The **Flow View** link shows the receipt flow plan for all items in the plan by week. You can compare the quantities planned for the AP segment and compare them to the top-down financial planning constraints set for the class and subclass by month.

Understanding the Common Sections and Actions Groups

There are common components and actions groups that can be accessed from the Assortment view, Item view, and the Flow view. The common sections and actions groups of the Plan Review screen are:

- Title
- Tabs
- Customize Table
- Print or Export

Understanding the Title section

The **Title** section is a common component to all the main Plan pages. The screen has pre-populated informational fields listed on top of every screen. It displays the information of the selected plan from of the Plan Worklist screen.

The display and location of the Title section fields cannot be changed or moved from the screen.

Table 8–1 Title fields of the Plan Review screen

Field Name	Description
Assortment Planning	Screen title.
Dept Name	Merchandise description for the plan.
Dept	Department ID.
Period	Period of the plan.
Store Group	Name of the store group applied to the Plan.
Store Period	
Plan Status	<p>The Plan's status is derived based on the lowest value of any Item in the Plan:</p> <ul style="list-style-type: none"> ■ In Progress - default status indicating the plan is under development. ■ Ready - plan has been completed and is ready to be reviewed. ■ Validated - plan has undergone validation and is ready to be submitted. ■ Submitted - plan has been submitted to the database.
Filtered	Indicates with a Yes or No , if a filter has been applied to the current screen.

Using the Common Tabs

The Tab section on the **Assortment View**, **Item View** and **Flow View** tab contains links to other view screens on the **Plan Worklist**. Select the item name from the **Plan Worklist** window and click on any of the view from the **Plan Review** section to view the selected items in the desired screen.

Customizing Table

The **Customize Table** functionality is common to all the three views in the **Plan Worklist** window. It allows you to customize display of data in certain screens in the **Assortment**, **Item**, and **Flow** views. You can perform multiple sorts, show/hide columns, re-order columns and filters.

To customize the table:

1. On the Main Menu, click Planning. The Plan Library screen appears.
2. Click the name link of a plan to select it from the **Plan Library**. The **Plan Worklist** of the plan you selected appears.
3. In the **Plan Review** links, click the desired view screen. The selected view screen appears.
4. Click the down arrow on the **Action** drop-down list, select **Customize Table**, then click **Apply**. The **Customize Table** screen appears.

The screenshot shows the 'Customize Table' dialog in Oracle Assortment View. The 'Sort Table' tab is selected. It contains three rows for sorting criteria: 'Calculation Info : Pack Size', 'Attributes : Collection', and 'Item ID'. Each row has radio buttons for ascending (A-Z) and descending (Z-A) sorting, and radio buttons for column order (1-100 and 100-1). The 'Done' and 'Cancel' buttons are at the top right.

5. Select from the **Sort Table**, **Filter Table**, or **Change Columns** to customize your table.
 - **Sort Table** - You can sort in ascending or descending order and in different column orders.
 - **Filter Table** - You can filter column data by setting your criteria, add a new filter or delete an existing filter. Any number of filters can be added.
 - **Change Columns** - You can re-order columns, hide/show columns, or move/up any existing column. Columns that have stars (*) are displayed by default.
6. Click **Done** to save the changes, or click **Cancel** to revert the changes.

Printing or Exporting data

You can print your data or export the data to an excel sheet.

To print or export data:

1. On the **Main Menu**, click **Planning**. The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**. The **Plan Worklist** of the plan you selected appears.
3. In the **Plan Review** links, click the desired view screen. The selected view screen appears.
4. Click the down arrow on the **Action** drop-down list, select **Print or Export**, then click **Apply**. The **Print or Export** window appears noting the number of columns and rows that are visible.
5. Click **Print** if you wish to take a print document of the screen, or click **Export** if you wish to send the data to an Excel sheet.

Understanding Assortment View

The **Assortment View** screen displays planned receipts of merchandise at the item and color level by volume groups and subsets for the designated plan period. The display also provides top-down financial budget data at the total and volume groups/subset levels for the designated plan period and shows how the assortment plan compares to budget constraints.

[illegible]

- **Manual** is default calculation method for the Assortment Plan. You can enter data to generate average per store (APS) quantities so that every store within a volume group receives the same quantity.
- **Calc %** spreads the top-down financial budget at the class or subclass level down to units based on various user inputs.
- **Spread Item Total** calculation spreads a specific number of units as entered by the user at the item/chain level to stores given a defined store cluster.
- **Copy Need to AP** enables you to use the receipt quantities derived through the bottom-up or the Need data segment for the AP.

1. On the **Main Menu**, click **Planning**. The **Plan Library** appears.
2. Click the name link of a plan to select from the **Plan Library**. The **Plan Worklist** of the plan you selected appears.
3. In the **Plan Review** links, click **Assortment View**. The **Assortment View** tab appears on the screen.

Understanding Title section

The Assortment View tab has three buttons, which allows the following actions to be applied to the complete **Assortment view** screen.

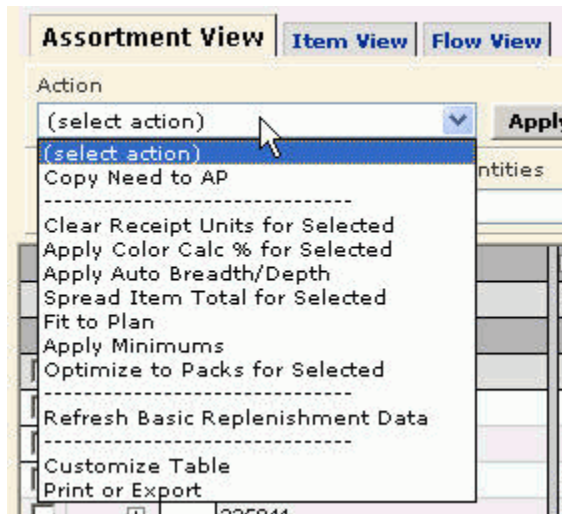
Table 8–2 Title section buttons

Button Name	Action
Save	Use this button to save any changes made to the database.
Revert	Use this button to discard any changes made to the screen and revert to the last saved state.
Done	Use this button when you are finished with any action on the screen and wish to exit out of the current screen.

This view also has the pre-populated informational fields that are common to all the three screens in the **Plan Worklist** window. Refer [Understanding the Common Sections and Actions Groups](#) for details.

Using the Action List

The **Action** drop-down list on the **Assortment View** tab includes actions that enable you to modify your assortment plans. You can select an item or a group of items from the grid, select an action you wish to perform on the selected merchandise, and click **Apply** to proceed with the desired task.



The actions on the drop-down list include the following functionality:

- Copy Need to AP
- Clear receipt units for selected
- Apply Color Calc% for selected
- Apply Auto Breadth/Depth
- Spread Item total for Selected
- Fit to Plan
- Apply Minimums

- Optimize to Packs for Selected
- Refresh Basic Replenishment data - Not for the current release
- Customize Table
- Print or Export

Copying Need to AP

The **Copy Need to AP** functionality from the **Action** drop-down menu copies the Need segment by store for the plan period to the AP data segment based on the item's generated forecast for the selected items. APS quantities for each volume group/subset are then recalculated and displayed in the grid, and they are available for manual edit.

To copy an item's need data to AP:

1. On the **Main Menu**, click **Planning**.
The **Plan Library** screen appears.
2. Select the plan from the **Plan Library**.
The Plan Worklist of the selected plan is displayed.
3. In the **Plan Review** links, click **Assortment View**.
The Assortment View tab is displayed.
4. Click the checkbox next to the item description to select an item whose need you want to copy.
5. Click the down arrow on the **Action** drop-down list, select **Copy Need to AP**, then click **Apply**.
The detailed receipt data by store is copied to the AP and displays in the **APS** receipts by volume groups column.

Clearing Receipt Units for Selected

The **Clear Receipts Unit for Selected** functionality clears the receipt units from the AP data segment.

To clear receipts units for selected:

1. On the **Main Menu**, click **Planning**. The **Plan Library** screen appears.
2. Select the plan from the **Plan Library**. The **Plan Worklist** of the selected plan is displayed.
3. In the **Plan Review** links, click **Assortment View**. The **Assortment View** tab is displayed.
4. Click the checkboxes next to item descriptions to apply Clear receipts units.
5. Click the down arrow on the **Action** drop-down list and select **Clear Receipts unit for selected**, then click **Apply**.
The Receipt item units are deleted from the **Store Receipts** column.

Applying Color Calc% for Selected

The **Apply Color Calc % for Selected** functionality spreads the total quantity of item at the style level down to color/store/week level. This supports the development of style/color quantities and achievement of the assortment strategy's color mix.

To apply color calc % for selected:

1. On the **Main Menu**, click **Planning**.
The **Plan Library** screen appears.
2. Select the plan from the **Plan Library**.
The **Plan Worklist** of the selected plan is displayed.
3. In the **Plan Review** links, click **Assortment View**.
The **Assortment View** tab is displayed.
4. Click the checkboxes next to item descriptions to apply color calc %.
5. Enter the Calc% for each item in the **Calculation Info** column.
6. Select the **Apply Color Calc %** from **Action** drop-down list.
7. Click **Apply**.

This will spread the total quantity at the style level down to the style/color level.

Applying Auto Breadth/Depth

Once the AP plan is set, you can tailor buy quantities by store sets and volume groups as per their merchandising strategy. You can edit APS quantities for all stores, by volume groups or store set by adjusting buy quantities for each item/color by chain, climate, volume groups, etc. The adjustment will not overwrite store level demand, it will scale up or down the store level demand by manipulating the average.

The Apply Auto Breadth/Depth functionality calculates the optimal depth and breadth of the assortment plan, based on the financial budget dollars available by store at the Department or Sub-Department level, the Min for each item, the retail price, and the percent of contribution each item in the assortment.

To apply auto breadth/depth:

1. On the **Main Menu**, click **Planning**.
The **Plan Library** screen appears.
2. Select the plan from the Plan Library.
The **Plan Worklist** of the selected plan is displayed.
3. In the **Plan Review** links, click **Assortment View**.
The **Assortment View** tab is displayed.
4. Click the checkboxes next to item descriptions to apply auto breadth/depth.
5. Enter the ratio or % contribution into the **Calc %** field.
6. Select the **Apply Auto Breadth/Depth** from **Action** drop-down list.
7. Click **Apply**.

This will effectively spread the financial receipt budgets to each store based on what each store can afford.

Spreading Item Total for Selected

Spread Item Total for selected spreads the total chain receipt units in the AP data segment for an item to stores using the financial budget per store as a spread metric.

Fitting to Plan

The **Fit to Plan** functionality automatically reconciles the total item receipt quantities to individual store level financial plans within the specified Financial Plan Tolerance, by scaling the assortment plan item quantities up or down by store. This function adjusts receipt quantities in the AP data segment to match the overall department budget by store to ensure that each store is within its defined tolerance level as configured in Business Rules Process Management.

Applying Minimum

The assortment **MIN** is a constraint set by the user, indicating the quantity for an item in units that must be achieved at the store level. The **Apply Minimums** functionality ensures that every item and store combination is receiving at least the minimum units and adjusts the stores that are receiving less than the minimum units.

The **MIN** is set at the Chain, subset, or subset/volume group level. This feature uses the chain level values set on the **Plan Worklist**, unless the subset or volume group values have been specified in the assortment view, in which case it uses the values set at the lower level.

If no **Mins** are set at the color level, the system assumes a color minimum equal to the pack size and calculates units as a total percentage of the item.

To apply minimums to the subset /volume group level:

1. On the **Main Menu**, click **Planning**.
The **Plan Library** appears.
2. Click the name link of a plan to select it from the **Plan Library**.
The **Plan Worklist** of the plan you selected appears.
3. In the **Plan Review** links, click **Assortment View**.
The **Assortment View** tab appears.
4. Click the checkbox next to the item description to select an item to which you want to apply minimums.
5. Click the down arrow on the **Action** drop-down list, select **ApplyMinimum**, then click **Apply**. The AP table adjusts to display the Min inputs.

Optimizing to Packs for Selected

Optimize to Packs enable you to convert selling units to ordering units by applying pack constraints. The optimization process first applies size profiles to break item and color information down to SKU and then rounds SKU store-level receipt units based on available pack configurations.

Pack optimization occurs upon item submittal and you can execute pack optimization at any point in the planning process.

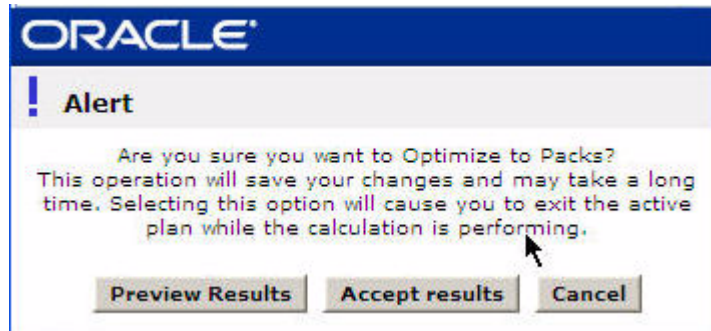
To optimize plan quantities to pack configurations:

1. On the **Main Menu**, click **Planning**.
The **Plan Library** appears.
2. Click the name link of a plan to select it from the **Plan Library**.
The **Plan Worklist** of the plan you selected appears.
3. In the **Plan Review** links, click **Assortment View**.

The **Assortment View** tab appears.

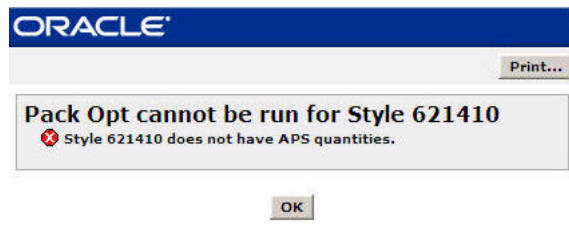
4. Click the checkbox next to the item description to select an item or items that you want to optimize to packs.
5. Click the down arrow on the **Action** drop-down list, select **OptimizetoPacks**, then click **Apply**.

A pop-up alert window appears confirming to optimize the packs.



6. Click **Preview Results** to view the pack optimization. Or **Accept Results** to accept the pack optimization results.

If there is a validation error, another pop-up window appears displaying the reason for failure for pack optimization.



7. Click **OK** and set the APS quantities in the **Assortment View**. Follow from step 1 to step 5 to regenerate pack optimization.

The system logs you out of the plan while it executes the Optimize to Packs calculation and the plan is locked. You may re-enter the plan from the Plan Library on a read-only basis until the calculation is complete.

Once the calculation is complete, you may enter the plan with write access. The receipt quantities shown on the **Assortment View** or the relevant items are updated based on the results of the pack optimization calculation. The **P-OPT** column within the **Assortment View** is updated with a 'D' to indicate optimization calculation is complete.

Using Show button

The **Show** section of the Assortment Planning screen enables you to display the filter data as set by you. The **Show** drop-down list has five options to select the drop-down values to view the data at different levels of details.

To view the data, select from the drop-down values of the following fields and click the **Show** button to refresh the **Assortment View** grid:

Table 8–3 Show section fields and description

Fields	Description
Storesets	Use the Storesets drop-down list to flip the view by changing the store set from the default primary store set to the selected store set. The storeset list can be configured using the Store Management link on the Main Menu.
Subsets	Use the Subsets drop-down list to filter the assortment view by any subset of a selected store set.
Quantities	Use the Quantities drop-down list to select any combination of APS, Min, or Pres Min to display in the Assortment View grid.
Data	Use the data drop-down list to select any combination of AP, Need, or LSP data segments to display in the Assortment View grid.
Product Group	Use the product group to filter Assortment View by any product group.
Show	After drop down values are chosen, click the Show button to refresh the Assortment View grid.

Understanding Assortment Tab Grid

Table 8–4 Assortment view tab fields

Column Heading	Description
Expand/Collapse	Use the collapse/expand functionality by row, controlled by clicking [-] or [+], to view different cuts of data at the item or color level.
Hide/Show	Use the hide/unhide functionality available by column grouping to expand or collapse sections in the Assortment View screen.
Seq	Sequence displays the item's place in the assortment sequence.
Item ID	Item identification number.
Item Information	Provides item details. Description - brief explanation of the item/color. Purchase Type - displays the item type, can be customized For example- F (Fashion), B (Basic) AP - displays the Item's Status: <ul style="list-style-type: none"> ■ I - In Progress ■ R - Ready ■ V - Validated ■ S - Submitted ■ C - Changed P-OPT - displays the pack optimization status. D indicates that the optimization is complete. Colors - displays the number of planned colors in the item.
Attributes	Client Configurable

Table 8–4 (Cont.) Assortment view tab fields

Column Heading	Description
Calculation Info	<p>Displays data that affects calculations, including:</p> <p>Source - indicates calculation method for item's averages per store (APS) quantities. The default value is Manual, but can be overridden with Calc %, Spread, or Need.</p> <ul style="list-style-type: none"> Manual - user-generated APS Need - copied from the forecast data segment Spread - spread item total Calc% - item calc % <p>Pack Size - lowest pack size associated with the item.</p> <p>Min - the minimum quantity of item stores (optional at volume grade and store subset) must receive on average in order to be eligible for that item. Validation will fail if the quantity is less than the minimum specified.</p> <p>Pres Min - minimum number of units needed in stores to support item or color presentation for the last receipt date. The default value is entered in Plan Worklist, but can be overridden at the volume grade or store subset in the Assortment View screen.</p> <p>Calc % - percent contribution to apply to each item within the assortment or color within a particular item. The % value is used in various Assortment Planning calculations.</p> <p>Cost - wholesale cost of an item. It is read-only in the Assortment View.</p> <p>Retail - displays the item's retail price.</p> <p>IMU - initial markup percentage of an item.</p>
All XXX	APS for each data segment, where XXX is the total number of stores.
Volume Grades	APS for all stores within a volume group, display can be set to AP/ Need/LSP data segments and Min and Pres Min from the Quantities drop-down list.
Store Receipts	<p>Displays the average receipt quantities per store.</p> <ul style="list-style-type: none"> Receipts Units - total receipt units. % Receipts Units - receipt unit percent contribution to Plan. Receipts \$ - total receipt value of the merchandise in Dollars % Receipts \$ - receipt Dollars percent contribution to Plan.
# Stores	Number of stores in the set carrying the item.

Understanding Item View

The **Item View** screen displays an item or group of items and their metrics by week. The **ItemView** screen provides you the visibility to planned sales, receipt, inventory, gross margin and key metrics by week and month.

The system creates item plans by week based on forecasted or adjusted buy quantities and sales curves. The system also creates optimal product store and DC flow plans based on forecasted sales, delivery frequency, flow dates, and various other data input in the plan.

- The **Plan Library** screen appears.

- The **Plan Worklist** of the plan you selected appears.

- If you did not select an item prior to entering the **Item View**, or if you wish to change the selected items, you can use the **Edit Selected** and **Show All** buttons to switch items.

- You can review the product flow plan contribution for each item by season, month, or week for open-to-buy and feasibility analysis. You can select an item or group of items on the **Assortment view** or the **Item Workplan** and click the **Item View** to display the flow chart for the selected items.

- Selected Items to Edit
- Action drop-down list
- Show
- Grid

Selecting Items to Edit

The **Select Items to Edit** option displays the information of the selected item/items from the **Plan Worklist** screen or Assortment View tab. It is read only section. If you have selected multiple items, the **Item View** tab will display all the items and item related information like Item Info, Status, Required Info, Optional Info, and Buy Parameters.

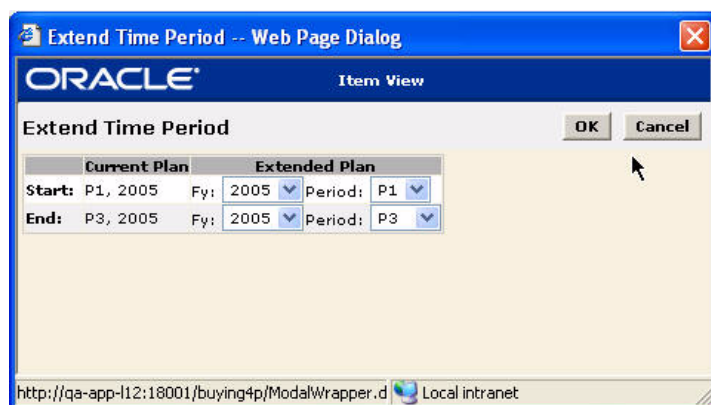
If you have not selected an item prior to entering the **Item View**, or if you wish to change the selected items, you can use the **Edit Selected** and **Show All** buttons to switch items.

Using Action list

The **Action** drop-down lists on the **Item View** tab enables you to extend time period for the planned items and copy need to AP. You can select an item or a group of items from the Plan Worklist or Select Items to Edit, select an action you wish to perform on the selected items, then click **Apply** to proceed with the desired task.

Extending Time Period

The **Extend Time Period** functionality allows you to extend the time period for the selected item or items to financial periods prior to or after the plan period.



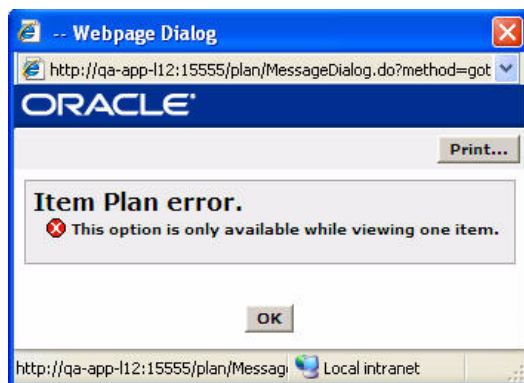
To extend time period:

1. On the **Main Menu**, click **Planning**.
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.
The **Plan Worklist** of the plan you selected appears.
3. Click the checkbox of an Item for which you would like to extend the time period and click **Item View** tab.
Alternatively, you can select the item from **Select items to Edit** and click **Edit Selected**.
4. Click the down arrow on the **Action** drop-down list, select **Extend Time Period**, then click **Apply**.
The **Extend Time Period** pop-up window appears.
5. Change the dates in the **Extended Plan** Start and End dates and click **OK**.

Copying Need to AP

The **Copy Need to AP** feature copies the forecasted need data segment to the AP data Segment. The functionality enables you to use the receipt quantities derived through the Need data segment for the AP data segment. Refer [Copying Need to AP](#) to know how to copy need to AP.

If no item is selected from the Plan Worklist, a pop-up window displays the error that this option is available only while viewing one item.



Click OK. Select one item from the Plan Worklist and click Item View tab. Select Copy Need to AP from the Action drop-down list and click Apply. The Need receipt quantities gets copied to the AP segment.

Using Show button

This section of the **Item View** screen enables you to display the filter item data as set by you. To view the data, select from the **following Data** drop-down values and click **Show** to refresh the **Item View** grid:

- Need
- Lily
- AP
- LSP

Understanding Item View Grid

The Item View grid displays data relative to the selected item or group of items from the Select Item to Edit section for the data segments selected in the Data drop-down list. All columns in the Item View grid is replicated for each data segment selected from the Data drop-down list.

The Item View grid contains following columns:

Table 8–5 *Item View grid fields and description*

Fields	Description
Fiscal week	Planned fiscal week of the item.

Table 8–5 (Cont.) Item View grid fields and description

Fields	Description
Store Receipts	<p>Displays the actual receipt quantities for all stores as per data segment selected in the Data drop-down list.</p> <ul style="list-style-type: none"> ■ Receipts Units - total receipt units by time period. ■ % Receipts Units - receipt unit percent contribution to Plan. This field is editable for the AP segment and allows to alter the receipt flow ■ Receipts \$ - total receipt value of the merchandise in dollars by time period. ■ % Receipts \$ - receipt dollars percent contribution to Plan.
DC Receipts	<p>Displays the total DC receipts as per data segment selected in the Data drop-down list.</p> <ul style="list-style-type: none"> ■ DC Receipt Unit - total DC receipt units by time period. ■ DC Receipts \$ - total DC receipt dollars by time period.
Sales	<ul style="list-style-type: none"> ■ Sales U - total sales units by time period. ■ % Sales U - percentage of sales units by time period. ■ Sales \$ - total sales dollars by time period. ■ % Sales \$ - percentage of sales in dollars by time period.
BOH	<ul style="list-style-type: none"> ■ BOH U - beginning on hand units for a time period. ■ BOH \$ - beginning on hand Dollars for a time period.
EOH	<ul style="list-style-type: none"> ■ EOH U - ending on hand units for a time period. ■ EOH \$ - ending on hand Dollars for a time period.
Mark Down	<p>Markdown planned for the item.</p> <ul style="list-style-type: none"> ■ PermMD\$ - permanent markdown dollar totals per time period taken for selected item or items. ■ POS MD\$ - point of sale markdown dollar totals per time period taken at the register for selected item or items. ■ Total MD\$ - mark down in Dollars. ■ MD % - mark down in percentage. ■ MD IND - markdown indicator shows the most significant pricing event that was in effect that week determined by order of precedence.
Avg Unit	<p>Displays the average retail quantities per store.</p> <ul style="list-style-type: none"> ■ Sales AUR - average unit retail for a time period. ■ AUC - average unit cost for a time period.
Gross profit	<ul style="list-style-type: none"> ■ GP \$ - gross profit Dollars by time period [Unit Sales * (AUR - AUC)]. ■ GP % - gross profit percentage by time period [(AUR / AUC) - 1]. ■ GPROI - Gross Profit Return on Investment.
Sell through	<ul style="list-style-type: none"> ■ % ST \$ - % sell through in Dollars. ■ % ST U - % sell through in units.
Turn Over	<ul style="list-style-type: none"> ■ TO \$ - turn over Dollars. ■ TO U - turn over units.

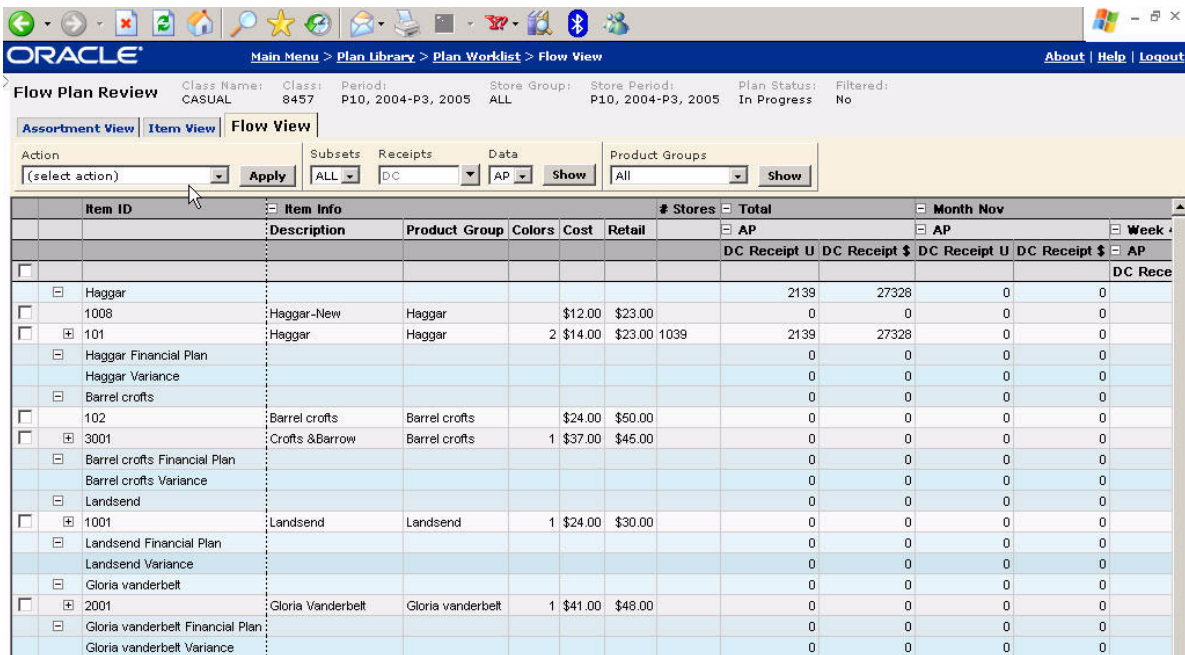
Table 8–5 (Cont.) Item View grid fields and description

Fields	Description
Num Stores	<ul style="list-style-type: none"> WOS - weeks of supply ST w/ Inv - # of stores with inventory for a time period. ST w/ Rec - # of stores with receipts for a time period.

Understanding Flow view

The **Flow View** tab displays how the AP or Need receipt quantities are planned to flow by week throughout the relevant plan period. The screen enables a comparison of those receipt plans to the top-down financial plan. The totals are then broken down over time based on the forecast engine's sales curve and receipt flow parameters, including the In Store Date, Out Date, Break Date, Delivery Frequency, Safety Stock, etc. Data presented in the view is read only, but can be updated by adjusting each item's calculation parameters or the overall planned receipt quantities in the **Assortment View**.

The **Flow View** shows the whole plan at a chain level by weeks. The **Flow View** can be seen in the context of the receipt data for some of DC and Store. The receipt flow can be filtered based on Product Groups available in the plan or subsets available in the primary store set.



The screenshot shows the Oracle Flow View interface. At the top, there's a navigation bar with 'Main Menu > Plan Library > Plan Worklist > Flow View'. Below this, a 'Flow Plan Review' section displays metadata: Class Name: CASUAL, Class: 8457, Period: P10, 2004-P3, 2005, Store Group: ALL, Store Period: P10, 2004-P3, 2005, Plan Status: In Progress, Filtered: No. The 'Flow View' tab is selected, showing a table with columns: Item ID, Item Info (Description, Product Group, Colors, Cost, Retail), # Stores, Total, and Month Nov (AP, DC Receipt U, DC Receipt \$, DC Receipt U, DC Receipt \$, AP, Week). The table lists items like Haggar, Haggar-New, Haggar, Haggar Financial Plan, Haggar Variance, Barrel crofts, Barrel crofts Financial Plan, Barrel crofts Variance, Landsend, Landsend Financial Plan, Landsend Variance, Gloria vanderbelt, Gloria vanderbelt Financial Plan, and Gloria vanderbelt Variance. Each item row shows its associated receipt data across different metrics.

To view the Flow View tab:

- On the **Main Menu**, click **Planning**.
The **Plan Library** appears.
- Click the name link of a plan to select it from the **Plan Library**.
The **Plan Worklist** of the plan you selected appears.
- In the **Plan Review** links, click **Flow View**.

The **Flow View** tab appears. You can also click the Flow View tab from any of the Plan Review screens. The Flow View tab appears.

Note: The AP data segment leverages the sales curve from the forecast to calculate Receipt flow by item/color, even if APS values are manually input or created using top-down tools. Therefore, you must set all calculation parameters for an item in order to see its Receipt flow.

The **Flow View** tab consists of the following sections:

- Action drop-down list
- Show
- Flow View Grid

Using Action List

The **Action** drop-down list on the **Flow View** tab has links to customize table and print or export options. Refer [Customizing Table](#) and [Printing or Exporting data](#) to know more on the topics.

Using Show button

The **Show** button of the **Flow View** screen displays the receipt item data as set by you. To view the data, select from the **Show** drop-down values of the following fields and click **Show** to refresh the **Flow View** grid:

Table 8–6 Show drop-down values and description

Fields	Description
Subsets	Use to display data for subsets in the main storeset for the plan.
Receipts	Use to filter data to view flow from/to on a weekly basis by receipts to the store or the DC.
Data	Use to display data segments in the grid.
Product Group	Use to filter data by any existing product group in the plan.

Using Flow View Grid

Table 8–7 Flow View grid fields and descriptions

Fields	Description
Expand/collapse	Use the collapse/expand functionality by row, controlled by clicking [-] or [+], to view different cuts of data at the item or color level.
Item ID	Item identification number from Plan Worklist.
Item Info	<ul style="list-style-type: none"> ■ Description - brief explanation of the item/color. ■ Product Group- product group of the item. ■ Color displays the number of planned colors in the item. ■ Cost - the wholesale cost of an item. ■ Retail - displays the item's retail price.

Table 8–7 (Cont.) Flow View grid fields and descriptions

Fields	Description
# Stores	Number of stores in the set carrying the item.
Total	<p>Store receipts</p> <ul style="list-style-type: none"> ■ Receipts Units - store receipt units. ■ % Receipts Units - store receipt unit percentage to the total store receipts for the plan period. ■ Receipt \$ - store receipt Dollars. ■ % Receipt \$ - store receipt Dollars percentage to the total store receipts for the plan period. <p>DC Receipts</p> <ul style="list-style-type: none"> ■ DC Receipts Units - distribution center receipt units. ■ % DC Receipts Units - distribution center receipt Dollars. <p>Receipts details for the month and weeks.</p>

Pack Optimization

The pack optimization process helps you identify the best pre-pack configuration and match the configuration with the store-level demand to determine the best possible pack quantities for an order.

The next step in the planning process, after you set up style and color level information for an item, is to generate optimal order quantities. This chapter describes how you can generate the optimal packs and order quantities for the items you want.

You must complete the following steps to generate optimal order quantities:

- Actualize items
- Select pre-defined packs
- Generate optimized packs

Actualize Items

Items are actualized to map it or link it to the configured prepacks. You can do this by assigning an item identification number to the mock item. This maps the key item information, as well as supports its integration with the purchase order management, and in-season plan management.

To actualize an item:

1. On the **Plan Worklist**, in the **Item ID** column (**Item Info** section), type the actual identification number for the item you want.
2. In the **Actualize** column, click **Mock**.

Note: If the colors of the mock item in the plan do not match the colors of the actual item (in the Item Master), an **Actualize Item** window appears where you can map each color of the mock item to the colors of the actual item. Once you map the colors, click **Add Selected Colors to Plan**.

3. Click **Save**.

In the Action drop-down list, use the Validate Item Data option to validate that the item's information synchronizes with the information in the Item master.

Selecting Pre-defined Packs

For each item, the pack configurations are defined based on the analytic insight, optimized size profiles, and escalation logic during implementation. Once you actualize an item, you can view and select the pre-defined optimal packs for the item. You can also set up delivery of specific configurations over different time intervals.

To view and select the pre-defined packs:

1. On the **Plan Worklist**, in the **Pack Configs** column, click **View**. The **Pack Configs** screen appears with all packs selected.
2. On the **Pack Configs** grid, clear the check box next to the pre-packs or loose sizes you want to exclude in the order quantities.
3. Click **Save**.
4. Click **Done**.

To select packs for specific shipping dates:

1. On the **Pack Configs** screen, in the **Add ship-to-store date** field, select a date you want.
2. Click **Add date**. The **Pack Configs** screen appears with an additional column for the ship-to-store date you selected.
3. In the **ship-to-store date** column, select the check boxes for the packs you want to be shipped on the delivery date.
4. Click **Save**.
5. Click **Done**.

Pack Configs Screen

Here are the fields that appear on the Pack Configs screen:

Table 9–1 Fields on the Pack Configs Screen

Field	Description
Add ship-to-store date	Select an applicable date when you want the packs to be shipped to the store.
Pack ID	The identification number of the pre-pack.
Pack Contents	Contents of the pack based on the various attributes for the item. For example, loose sizes and fabric of a trouser.
Pack Units	Number of units in the pack.
Defined By	The source of the pack. For example, analytical services (AS) or client.
Start of Time	Date that represents the beginning of the life cycle. If no other dates are added, this column represents the selections for the entire item life cycle. If you add a ship-to-store date, this column represents the pack selection for the beginning of the item's life cycle till the ship-to-store date.

Optimizing Packs

Once you select the pre-defined pack configurations, you must now optimize the packs for the item.

To optimize the packs:

1. On the **Assortment View**, select the item you want.
2. In the **Action** drop-down list, click **Optimize to Packs for Selected**.
A confirmation message appears.
3. To preview the pack optimization results, click **Preview Results**.

Or

To accept the pack optimization results without reviewing the results, click **Accept Results**.

Important: You have restricted (read-only) access to the plan till the pack optimization process completes. Once the optimization process starts, the Plan Library screen appears, and the plan gets locked by the Pack-Opt process.

4. Once the process is complete, click the plan, and navigate to the **Assortment View** for the item.

Note: On the Assortment View, the P-OPT column displays the pack optimization status for the item, where:

- D – Done
 - P – Preview
-
-

5. To preview the pack optimization results, in the **Action** drop-down list, click **Review Pack Opt Results**. The Assortment View now appears with additional **Pack Opt** columns that display the pack optimization results against the AP quantities.
6. To accept the pack optimization results, in the **Action** drop-down list, click **Accept Pack-Opt Results**.

Or

To continue working with plan without using the pack optimization results, in the **Action** drop-down list, click **Hide Pack-Opt Results**.

Validate Quantities

You can validate the pack optimization results using the following Merchant Desktop reports:

- PO Detail report – displays the SKU and Pack level chain detail for an item. Both mock and actualized items are available for reporting within and across plans.
- Pre-Allocation Detail report – displays the SKU and Pack level detail by store for an item.

For more information, refer to the Merchant Desktop user's guide.

Submitting Items

Item submittal is an important step in finalizing the item plan. By submitting the item, you can process the item plan data to an external system to create purchase orders.

In order to submit an item, the following item information must be complete and validated:

- Valid color-level with AP/APS quantities
- Valid ID #
- Actualized item
- Buy parameters
- Pack optimization
- Generated forecast

You can submit item(s) after all the required criteria is completed without any validation errors. If there are validation errors, the item can not be submitted and a pop-up message appears displaying the reason for the failure.

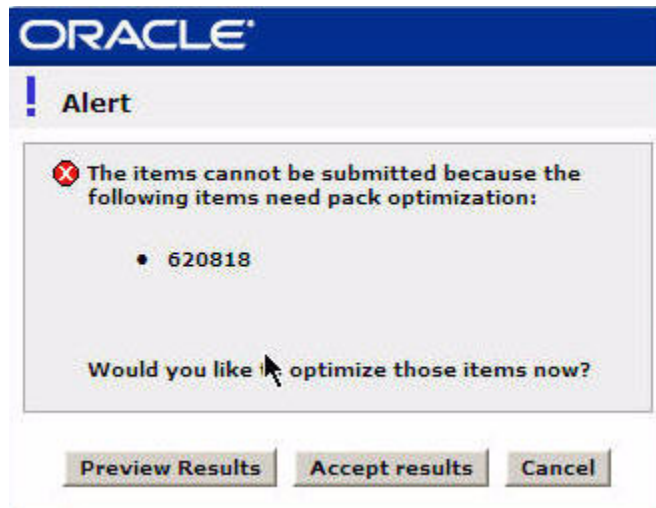
To submit an item:

1. On the **Main Menu**, click **Planning**. The Plan Library screen appears.
2. Click the name link of a plan to select it from the Plan Library. The Plan Worklist of the plan you selected appears.
3. Click the checkbox of the item(s) you want to submit.
4. Click the down arrow on the drop-down Action list, select **Submit Selected Status**, and click **Apply**. A confirmation pop-up window appears.



5. Click **OK** to submit the item(s) or click **Cancel** to revert the action.
If there are no validation errors, the item(s) is submitted.

If there are validation errors, like pack optimization or buy parameters not completed, an alert pop-up window displaying the reason for the validation failure appears.



6. Click **Accept Results** to optimize the items or **Cancel** to revert.

Clicking **Accept Results** overwrites the AP quantities with results of pack optimization. Clicking **Preview Results** runs pack optimization and allows you to see the results in the AP view prior to overwriting the AP quantities. Pack optimization results must be accepted before an item can be submitted.

The AP data segment is read-only for the submitted item, and the LSP or Last Submitted Plan data segment is overwritten with the current AP quantity.

Note: If you wish to make any changes to a submitted item, you must change the item's status to C (Changed) to bring the AP segment back to an editable status.

After you submit the item, the item status is changed to S (Submitted) and the item is eligible to interface with external systems.

Next Steps

Once all planning actions are complete, you can view reports that are available through the Merchant Desktop. These predefined reports are supplied to the Desktop by MicroStrategy.

Using Microstrategy, you can view and change the display of the information presented in reports.

See "[About Merchant Desktop Reports](#)" for general information on reports.

See "[Reports Supplied by Merchant Desktop](#)" for a list of default reports supplied with Merchant Desktop.

See "[Accessing Reports](#)" on how to access reports within MicroStrategy.

This section includes the following information:

- [About Merchant Desktop Reports](#) on page 11-1
- [Understanding Metrics in Reports](#) on page 11-2
- [Reports Supplied by Merchant Desktop](#) on page 11-3
- [Metrics Supplied with Merchant Desktop](#) on page 11-4
- [Accessing Reports](#) on page 11-9
- [About Privileges](#) on page 11-10
- [Opening MicroStrategy Reports](#) on page 11-10
- [Sharing MicroStrategy Reports](#) on page 11-11

11.1 About Merchant Desktop Reports

Merchant Desktop is a flexible reporting tool used to access and display reports and data you may use to analyze pre-season assortment planning information. This detailed reporting system is provided by MicroStrategy Web Universal. Only administrators and report administrators have the ability to create original reports, however; you may have the ability to personalize reports if access is granted. See ["Personalizing Merchant Desktop"](#) on page A-61 for information.

The administrator has assigned you a view within the Merchant Desktop. This view is the combination of tabs, screens, and components you are able to access when you log in to Merchant Desktop.

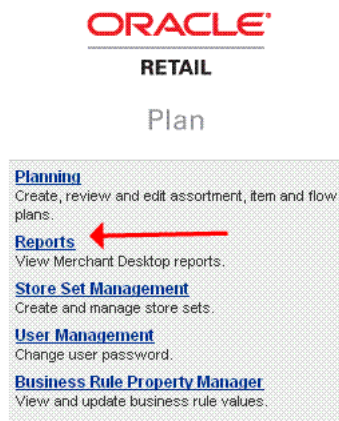
11.1.1 Accessing Reports

Once your plan is complete and all plan actions are done, access the Reports option from the Main Menu to view predefined reports.

To access the Predefined Reports:

1. From the Main Menu, select Reports.

If you do not have access and you need assistance, contact your system administrator.

Figure 11–1 Reports Option

2. Accessing the Reports link from the Main Menu will take you directly into the Plan MicroStrategy Reports.
3. View and manipulate the reports that are available to your user ID account.

11.1.2 Predefined Reports

You may have been assigned a view that includes some (or all) of the predefined report types. The following is a list of the predefined reports that may be displayed as tabs within your Merchant Desktop view:

- Financial Reports
- Attribute Mix Reports
- Item by Time Reports

If access is granted, you may be able to personalize these reports within the Merchant Desktop.

11.1.3 MicroStrategy Reports

Along with the predefined reports, the administrator may have assigned you a Reports tab in your view. This Report tab will take you directly to the MicroStrategy reporting system.

11.2 Understanding Metrics in Reports

Within Merchant Desktop (and all throughout the Plan application) are field labels that organize the presentation of information and calculations.

Metrics may be field headings (labels) and the field contents that display hyperlinks, numbers, dates and other results and calculations.

Attributes are listed on the left side of reports. In each report, there is a metric heading labeled: Metrics. Attributes are listed to the left of this field and may contain hyperlinks, numbers, dates and other results and calculations (depending on the type of Attribute).

Attributes and Metrics are configured during system set-up and reflect your company's unique business.

- Hyperlinks to pop up screens with additional information about the Metric and Attribute
- Hyperlinks to more detailed information (drill-down to more details and another screens)
- Attribute and Metric Results or Calculations (number, percentage, date or other characters)

[illegible]

The following reports may be available to you as a part of your default view within Merchant Desktop:

Table 11–1

Report	Description
Financial Report	<p>Financial Reports allow the user to view for sales, receipts, gross margin by a selected time frame within various merchandise hierarchy levels.</p> <p>For Post Mortem, the sales and receipt inventory may be either the actual sales and inventory and/or optimized sales and inventory data.</p> <p>The data may be rolled up and drilled down to review metrics at various levels of the Merchandise Hierarchy.</p>
Attribute Mix Report	<p>Attribute Mix reports allow the user to view the percent contribution of sales and receipts by attribute for selected merchandise hierarchy levels.</p> <p>For Post Mortem, the sales and receipt inventory may either be the actual sales and inventory and/or optimized sales and inventory data.</p> <p>The data can be rolled up and drilled down to review percent contribution and other attributes and metrics within various levels of the Merchandise Hierarchy.</p>
Item by Time	<p>Item by Time Reports allow the user to view item details over a specified period of time.</p> <p>For Post Mortem, the sales and receipt inventory can either be the actual sales and inventory and/or optimized sales and inventory data.</p> <p>The data can be rolled up and drilled down to review metrics at various levels of the Location and Merchandise Hierarchy.</p>
Purchase Order Report	<p>This report allows the user to view the output of the pack optimization process in a format that enables them to enter data into a purchase order management system.</p> <p>In this report, the elements you need to create a purchase order include, DC Receipt Date, Vendor, Receipt Units by SKU, Total Units Per Pack by SKU, and Total Number of Packs.</p>
Store Allocation Report	<p>This report allows the user to view the output of the pack optimization process in a format that enables them to view store-level shipment information.</p> <p>Use this report to review the store allocation strategy or to create purchase orders with store-level information.</p> <p>The elements you need to validate allocations or to create a store-level purchase order are Store Receipt Date, Vendor, Receipt Units by SKU, Total Units Per Pack by SKU, and Total Number of Packs.</p> <p>The report data can be rolled up and drilled down to review Location Hierarchy</p>

11.4 Metrics Supplied with Merchant Desktop

The following table lists a subset of the metrics listed within your reports. Metrics are listed in alphabetical order.

Table 11–2

Metric	Metric Meaning	Metric Calculation
# of Customer Choices	Color Count	# of COLORS w/ BOH > 0

Table 11-2 (Cont.)

Metric	Metric Meaning	Metric Calculation
# of Selling weeks	Number of weeks an item has been selling to date	If EOH > 0 OR Sales > 0 then (System Date - First Receipt date) in weeks, rounded up; Else 0
# of Styles	Style Count	# of STYLEs w/ BOH > 0
% GP \$	Gross Profit \$ % Contribution to Total	GP\$/Total GP \$
% Receipt \$	Store Distributions \$ % Contribution to Total	Receipt \$/ Total Receipt \$
% Receipt U	Store Unit Distributions % Contribution to Total	Receipt U/ Total Receipt Units
% Sales \$	Sales \$ % Contribution to Total	Sales \$ / Total Sales \$
% Sales U	Sales Unit % Contribution to Total	Sales U / Total Sales Units
% ST U	Unit Sellthru %	LTD Sales Units / (LTD Receipt Units)
ADJ GP %	Gross Profit % Adjusted with terms for domestic items	((ADJ_IMU * 100) - ((WeekTY Total MD% + Shrink%)) * (1-ADJ_IMU))
ADJ IMU	Markup adjusted with terms for Domestic items	If Domestic (Retail - Cost*0.86) / Retail, else IMU
ASR	Average Selling Price	Sales \$ / Sales U
AUC	Weighted Average Cost	WeekTY COST
AVG INV \$	Store Average \$ Inventory	(SUM[WeekTY BOH_DLRS] + MonthTY EOH_DLRS) / (# of weeks + 1)
AVG INV \$ @ Cost	Store Inventory Weighted Average cost	(SUM[WeekTY BOH_UNITS * COST] + MonthTY EOH_UNITS * COST) / (# of weeks + 1)
AVG INV U	Store Average Unit Inventory	(SUM[WeekTY BOH_UNITS] + MonthTY EOH_UNITS) / (# of weeks + 1)
BOH \$	Store \$ Inventory at Beginning of the week (DC not included)	BOH U * CurrentPermPrice
BOH U	Store Unit Inventory at Beginning of the week (DC not included)	BOH U
Current Retail	Current Item Price	Current Retail
EOH \$	Store \$ Inventory Week ending (DC not included)	EOH U * CurrentPermPrice
EOH U	Store Unit Week ending Inventory (DC not included)	EOH U
First Receipt Date	Earliest date at which inventory was received	First week where EOH > 0 OR Sales > 0

Table 11-2 (Cont.)

Metric	Metric Meaning	Metric Calculation
FRESH STK	% of the new 6 weeks Receipts to total On Hand Inventory on Hand	SUM n: 1 to 6 [Week -n Receipt U]/ current EOH
GP \$	Gross Profit \$	GP \$ {Derived for Optimized History: (GP% / 100) * WeekTY Sales \$}
GP \$ % Diff TY to OPT	OPT Gross Profit \$ % Change to TY Actual Gross Profit \$	((OPT GP \$/ TY GP \$) - 1) * 100
GP %	Gross Profit %	GP\$ / WeekTY Sales \$ * 100 {Derived for Optimized History: ((IMU * 100) - ((WeekTY Total MD% + Shrink%)) * (1-IMU))}
GPROI	Gross Profit Return on Investment	SUM[WeekTY GP_DLRS] / AVG_INV_DLRS_COST
IMU	Weighted Markup %	(Retail - AUC) / Retail
Initial Retail	Original Item Price	Original Retail
LTD Rcpt \$	LTD Store \$ Distributions	Sum([Ltd Rcpt Amt ToDate])
LTD Rcpt U	LTD Store Unit Distributions	Sum([Ltd Rcpt Units ToDate])
LTD Sales \$	LTD Sales \$	Sum([Ltd SlS Amt ToDate])
LTD Sales U	LTD Unit Sales	Sum([Ltd Rcpt Units ToDate])
MD Sales \$	Permanent Markdown \$ Sold	MD Sales \$ {Derived for Optimized History: If Retail < Initial Retail, then = Sales \$, else 0}
MD Sales \$ % to Total	Permanent Markdown \$ Sold % Contribution to Total	MD Sales \$/Total Sales \$
MD Sales U	Permanent Markdown Units Sold	MD Sales U {Derived for Optimized History: If Retail < Initial Retail, then = Sales U, else 0}
NORM CHK	Normalized Checkout %	(1-(((EOH)/(LTD Receipt Units)) ^ (1/# of Weeks))) * 100
Out Date	The date when the item should be sold out.	Out Date
Perm MD \$	Permanent Inventory devaluation Amount	Perm MD \$ {Derived for Optimized History: BOH U * (Retail[Week-1] - Retail)}
POS MD \$	Inventory devaluation Amount of units sold at Promo price	POS MD \$ {Derived for Optimized History: (Sales U * Retail) - Sales \$}

Table 11-2 (Cont.)

Metric	Metric Meaning	Metric Calculation
POS Sales \$	\$ Sold at Promo & Employee Discount price	POS Sales \$ {Can't derive for Optimized history unless we use TY % and assume constant}
POS Sales \$ % to Total	Promo \$ Sold at Promo & Employee Discount price % Contribution to Total	POS Sales \$/Total Sales \$
POS Sales U	Units Sold at Promo & Employee Discount price	POS Sales U {Can't derive for Optimized history unless we use TY % and assume constant}
Receipt \$	Store \$ Distributions	Receipt U * Retail
Receipt \$ % Diff TY to OPT	OPT Receipt \$ % Change to TY Actual Store Distributions	((OPT Receipt \$/ TY Receipt \$) -1) * 100
Receipt U	Store Unit Distributions	Receipt U
Receipt U % Diff TY to OPT	OPT Receipt Unit % Change to TY Actual Store Distributions	((OPT Receipt U/ TY Receipt U) -1) * 100
Reg Sales \$	Reg Priced \$ Sold	Net Sales \$ - POS Sales \$ - MD Sales \$ {Can't derive for Optimized history unless we use TY % and assume constant}
Reg Sales U	Reg Priced Units Sold	Net Sales U - POS Sales U - MD Sales U {Can't derive for Optimized history unless we use TY % and assume constant}
Sales \$	Net \$ Sales	Net Sales \$
Sales \$ % Diff TY to OPT	OPT Sales \$ % Change to TY Actual Sales	((OPT Sales \$/ TY Sales \$) - 1) * 100
Sales U	Net Sales Units	Net Sales Units
Sales U % Diff TY to OPT	OPT Sales U % Change to TY Actual Sales	((OPT Sales U/ TY Sales U) - 1) * 100
Stores w/ Inv	Number of Stores with Inventory	# of Stores w/ BOH > 0
Stores w/ Rec	Number of Stores with Receipt U	# of Stores w/ Receipt U > 0
TO \$	\$ Turn over ratio	SALES_DLRS / AVG_INV_DLRS_RTL
TO U	Unit Turn over ratio	SALES_UNITS / AVG INV U
Total MD \$	Tot Inventory Devaluation--POS MD \$ + Perm MD \$	POS MD \$ + Perm MD \$
WOS	Weeks of Supply	EOH/SALES_UNITS
Sales Budget \$	Sales Budget	Dept Sales Budget \$

Table 11-2 (Cont.)

Metric	Metric Meaning	Metric Calculation
Sales Budget \$ % Diff	Percent difference between the Sales dollars and the Sales budget dollars	Dept Sales Budget \$
LY Sales U	Last Year Sales Units	Time shift Sales U 52 weeks into future
LY Sales \$	Last Year Sales Dollars	Time shift Sales \$ 52 weeks into future
Receipt Budget \$	Receipt Budget Dollars	Dept Receipt Budget \$
Receipt Budget \$ % Diff	Difference between the Receipt Dollar and the Receipt Budget Dollars	$((\text{Dept Receipt \$} / \text{Dept Receipt Budget \$}) - 1) * 100$
Budgeted IMU	Budgeted Initial Markup	Dept IMU Budget
Budgeted GP \$	Budgeted Gross Profit Dollars	Dept GP \$ Budget
Budgeted GP %	Budgeted Gross Profit Percentage	Dept GP % Budget
Budgeted GPROI	Gross Profit Return on Investment	Dept GPROI Budget
Budgeted Perm MD \$	Budgeted Permanent Markdown Dollars	Dept MD \$ Budget
Budgeted POS MD \$	Budgeted POS Markdown Dollars	Dept Promo \$ Budget
ST AVG INV \$ @ Cost	Stores Average Inventory Dollars at Cost	$(\text{SUM}[\text{weekly BOH_UNITS} * \text{COST}] + \text{Monthly EOH_UNITS} * \text{COST}) / (\# \text{ of weeks} + 1)$
ST AVG INV U	Units	$(\text{SUM}[\text{weekly BOH_UNITS}] + \text{Monthly EOH_UNITS}) / (\# \text{ of weeks} + 1)$
ST AVG INV \$	Stores Average Inventory Dollars at Retail	$(\text{SUM}[\text{weekly BOH_DLRS}] + \text{Monthly EOH_DLRS}) / (\# \text{ of weeks} + 1)$
Store GPROI	Stores Gross Profit Return on Investment	$\text{SUM}[\text{weekly GP_DLRS}] / \text{AVG_INV_DLRS_COST}$
Store TO U	Store Turnover Units	$\text{SALES_UNITS} / \text{AVG INV U}$
Store TO \$	Store Turnover Dollars	$\text{SALES_DLRS} / \text{AVG_INV_DLRS_RTL}$
Item Status	Indicates whether an item is in regular, POS, or markdown status	
POS BOH U	POS Beginning on Hand Units	
POS BOH \$	POS Beginning on Hand Dollars	
POS EOH U	POS Ending on Hand Units	

Table 11-2 (Cont.)

Metric	Metric Meaning	Metric Calculation
POS EOH \$	Point of Sale Beginning On Hand Dollars	
MD BOH U	Markdown Beginning On Hand Units	
MD BOH \$	Markdown Beginning On Hand Dollars	
MD EOH U	Markdown Ending On Hand Units	
MD EOH \$	Markdown Ending On Hand Dollars	
Reg BOH U	Regular Beginning On Hand Units	
Reg BOH \$	Regular Beginning On Hand Dollars	
Reg EOH U	Regular Ending On Hand Units	
Reg EOH \$	Regular Ending On Hand Dollars	
DC Receipt Units	Distribution Center Receipt Units	DC Receipt Units
DC Receipt \$	Distribution Center Receipt Dollars	DC Receipt Units * Initial Retail
Pack Desc	Prepack or Loose description for a Pack ID	
Number of Packs	Number of Packs on the shipment for a given Pack ID	
Units Per Pack	Number of units (of all SKUs) in the Pack	
Total Receipt Units	Total # of Units received for a given Pack ID / Shipment	Number of Packs * Units Per Pack
Total Retail	Total Receipt \$ for a given Pack ID / Shipment	Total Receipt Units * Initial Retail
Total Cost	Total Cost \$ for a given Pack ID / Shipment	Total Receipt Units * Cost
Item Size	Item Size of a SKU within the Pack ID	
Quantities by Size	# of units for an individual SKU within the Pack	Inside Units

11.5 Accessing Reports

Merchant Desktop provides you with a variety of ways to access both the predefined reports and the MicroStrategy reports. See ["Opening MicroStrategy Reports"](#) on page 11-10.

You may be able to access reports that are displayed on or within a screen or tab. Access these reports by clicking directly on the tab (the name of the tab differs according to your set up) that contains the correct name of the report you want to view.

If you have access to the Reports tab (these are the MicroStrategy reports) displayed within your view, you can:

- View, modify the display, and copy the reports in the folder called Shared reports (if you have such privileges).
- Access your My Reports folder, from which you may view, modify, and create as many additional folders as necessary (if you have such privileges).
- Access MicroStrategy's online help system, by clicking on the Help icon from the MicroStrategy report screen.

See your Desktop administrator or a Reports administrator to change your assigned privileges.

11.6 About Privileges

The Merchant Desktop reporting system is provided by MicroStrategy Web Universal. Although you will always access reports (and graphs) from Merchant Desktop, the application that provides them is MicroStrategy Web Universal. Once you log on to Merchant Desktop, you are also logged on to MicroStrategy Web Universal.

To access the MicroStrategy Reports, select the Reporting tab from your Merchant Desktop view. MicroStrategy Web Universal appears within the Merchant Desktop Reporting screen.

- Administrators have all access to Merchant Desktop administration tools and MicroStrategy web professional privileges.
- Report Administrators have personalization privileges in the Merchant Desktop and Micro strategy web professional privileges.

Most of the time, you won't notice a difference between Merchant Desktop and MicroStrategy Web Universal. The biggest difference is probably in the help systems. Therefore, when you access reports or graphs from the Report tab, click the MicroStrategy help icon for information on how to share reports, customize reports, etc.

11.7 Opening MicroStrategy Reports

You may open reports only if the administrator has assigned the Reporting tab (screen) to your user account.

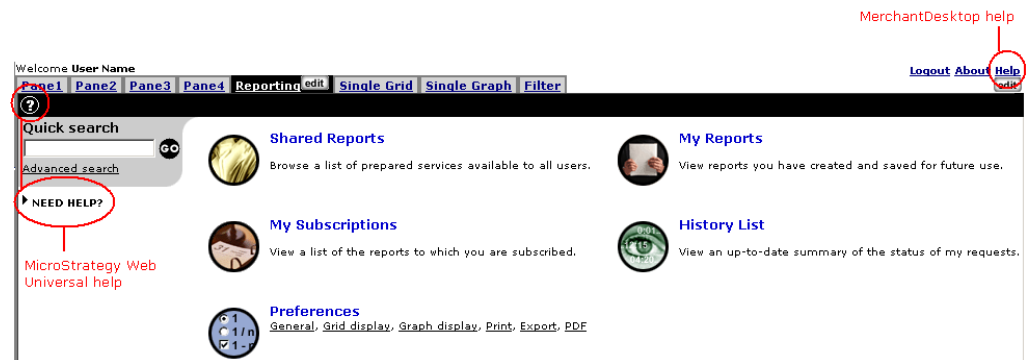
Note: The reporting system is provided by MicroStrategy Web Universal. When you access the Report tab, click the MicroStrategy help icon for information on how to subscribe to reports, customize reports, etc.

To access reports:

1. From your Merchant Desktop, click the Reporting tab.

Note: The first time you access reporting or any report or graph, there may be a delay before the actual MicroStrategy reporting screen appears. If this is especially slow, inform the administrator.

The Reporting screen appears with MicroStrategy Web Universal options.



2. From the report options that appear, click one of the following links to access reports:
 - Shared Reports - A list of reports created by administrators and other users that they have elected to share with other Merchant Desktop users
 - My Reports - A list of reports that you have created
 - My Subscriptions - A list of reports that you have scheduled to be executed, typically on a recurring schedule
 - History List - Depending on how the administrator has configured reporting, every report you have executed appears here, or only those reports you have selected for the history list appear here
3. Double-click the report you want to open. For information on navigating through reports, use the MicroStrategy help.

Note: If opening reports or drilling through reports is especially slow, inform the administrator.

11.8 Sharing MicroStrategy Reports

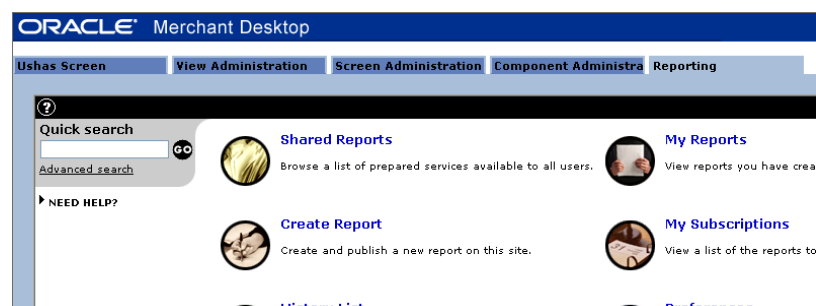
All users may share reports if given the Reports option by your Merchant Desktop administrator or Report administrator.

Note: The reporting system is provided by MicroStrategy Web Universal. When you access reporting, click the MicroStrategy help icon for information on how to subscribe to reports, customize reports, etc. It is recommended that you read the MicroStrategy help and any printed manuals thoroughly before modifying reports.

11.8.1 To Share Reports

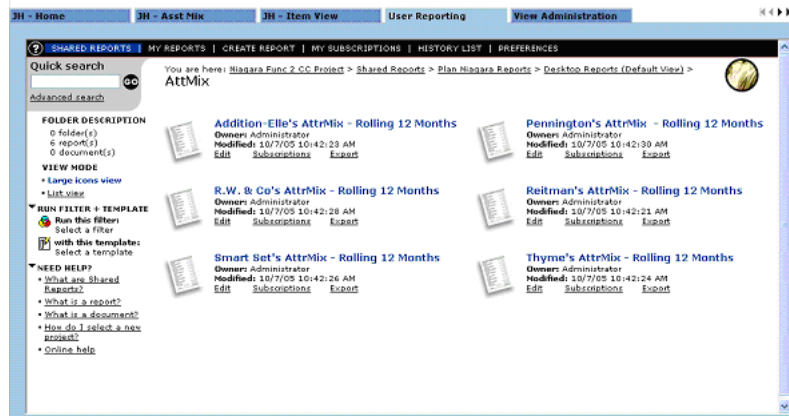
1. Click the Reporting tab.

The Reporting screen appears with MicroStrategy Web Universal options:



- Click the Shared Reports icon.

The MicroStrategy Web Universal Shared Report screen appears:



- Select an available report in the list. Click Next.
- Locate the MicroStrategy help in the lower left side of the Shared Reports screen, and click Help for further instructions on how to share reports in MicroStrategy.

Application Administration

The following sections contain information for Plan and Merchant Desktop administrators or users with certain privileges.

For information on managing Business Rules and users accounts, refer to:

- [Managing Business Rules](#) on page A-1
- [Managing User Accounts](#) on page A-14

For information on managing Merchant Desktop and MicroStrategy reports, refer to:

- [Report Administration](#) on page A-26
- [Merchant Desktop Administration](#) on page A-30
- [Personalizing Merchant Desktop](#) on page A-61
- [Troubleshooting](#) on page A-71

Managing Business Rules

Business rules specify the business constraints that Oracle Plan applies when performing calculations, forecasts, and other automated processing.

This chapter will help you to understand the concept of business rules and how to use the Business Rules Property Manager utility within the Oracle Plan application. The following topics are discussed:

- ["Understanding Business Rules"](#) on page A-2
- ["Explaining the Business Rules Property Manager Utility"](#) on page A-2
- ["Supported Business Rules"](#) on page A-3
- ["Accessing the Business Rule Property Manager Utility"](#) on page A-4
- ["Using the Filters"](#) on page A-6
- ["Adding Business Rules"](#) on page A-9
- ["Modifying Business Rule Settings"](#) on page A-9
- ["Copying Business Rule Settings"](#) on page A-11
- ["Deleting Business Rule Settings"](#) on page A-11
- ["Viewing Business Rule History"](#) on page A-13

Understanding Business Rules

Working with your company, Professional Services develops an understanding of your business rules (operational constraints that affect your important planning decisions). These business rules determine which data is needed for Plan calculations, and how the data should be displayed. Professional Services enter this data into Plan and configure it to assist you in making planning decisions within the context of your business rules.

The Following are some of the concepts related to business rules:

- How do business rules relate to actualized and mock Items?
- How do hierarchies and inheritance work with business rules?

Once Plan is installed, the Plan administrator must configure the business rule definitions and then load them into Plan.

How Do Business Rules Relate to Actualized and Mock items?

Within the Plan application, relevant business rules are similarly applied to actualized and mock items.

How Do Hierarchies and Inheritance Work with Business Rules?

Business rules and their default settings are determined during implementation. Each business rule setting is defined at the chain level (i.e., the top level of both the merchandise and location hierarchies) with optionally one or two attributes. (For example, if one of the attributes is a season code, some items in the early fall season might have different business rule settings than the same items in the late fall season.) In short, each business rule setting applies to a unique merchandise-location hierarchy level and attribute combination.

This inheritance is applied top to bottom from level to level. For example, assume your company is using a 10-level hierarchy with level 1 being the top (or chain level). When you change a rule setting at level 4, levels 5 through 10 inherit that setting. If later you change a rule setting at level 6, levels 7 through 10 inherit that new setting, but all of the levels above retain their settings.

Finally, if you decide to remove the setting at level 4, levels 4 through 5 inherit the setting from the next highest level. On the other hand, levels 6 through 10 retain their setting because they were explicitly set to a new value. Once you explicitly change a setting, that value is retained for that level (and the levels below it) until you change or remove it.

In summary, when you change or remove a rule setting at any level except for the top (chain) level, the levels below the changed level - up to the first level that was changed previously from the default - inherit the new setting. Settings above the changed level remain the same.

The rule value and the specific merchandise-location hierarchy and attribute(s) combination is called a rule instance. Values are set at points on the merchandise and location hierarchies, with the optional use of attributes, and an inheritance order defined

Explaining the Business Rules Property Manager Utility

The Business Rules Property Manager (BRPM) enables you to view and change business rule settings. Business rules can be configured in Plan to provide flexibility in flow plan calculations.

Business rules are usually set by administrative users. Most rules in Plan are set once and then not changed again. They can be set at any intersection of the merchandise hierarchy and location hierarchy. Lower levels of the hierarchy inherit values set at higher levels unless a specific value for that level is specified in the BRPM.

Use the BRPM to do the following:

- View current business rule setting for specified items. See ["Using the Filters"](#) on page A-6.
- Adding Business Rules See, ["Adding Business Rules"](#) on page A-9
- View an audit trail of which business rules were changed and when. See, ["Viewing Business Rule History"](#) on page A-13.

Supported Business Rules

Oracle Plan is configured with six default business rules accessible through the Business Rules Property Manager.

The business rules managed by business rule property manager are listed in the following Table. You may view and change these settings only if your user account has been assigned the rights to do so.

Each business rule has a default setting that is applied to the top of the merchandise and location hierarchies and to all attributes. The items in the Plan Worklist screen and merchandise and location hierarchy levels assigned to you inherit those top-level rule settings unless you change them.

Note the following:

- The business rules are sorted by category (Attributes, Merchandise Calculation Settings, Plan Management). When in the BRPM, scroll to the right to view all categories and the specific rules in each category.
- All business rule names may be customized, so the rule names that appear on your screens may not match those in the table below.
- Two Plan business rules are optional, ANNUAL_BASICS_PLAN_MIN and OOS_VALID_DAYS_OF_MONTH.

The following Table contains important information regarding the six default business rules that are part of the Oracle Plan application.

Table A-1 Default Business Rules

Name and UI Display	Description
AUR_ADJUSTMENT_PCT Average Unit Retail Discount Percent	The average unit retail discount percent. Used in the display of new plans. Default Value: 12
ANNUAL_BASICS_PLAN_MIN Annual Basics Plan Minimum	The minimum annual receipt quantity. Used to calculate the minimum value for new basic items and to validate basic items. An optional business rule. Default Value: 12
SAFETY_STOCK Safety Stock	The additional time, in days, to stock an item so that it is not out-of-stock. Default Value: 14

Table A-1 (Cont.) Default Business Rules

Name and UI Display	Description
TOLERANCE_PCT Tolerance Pct	The acceptable variance, expressed as a percent, from the Store Financial Plan. Default Value:.1
OOS_VALID_DAYS_OF_MONTH Out Of Stock Valid Days of Month	List of days that are valid as out-of-stock days. An optional business rule. Default Value: 1,15
PRODUCT_GROUP_ATTR Product Group Attribute	Indicates whether or not Product Groups are auto-generated or not (the default). If auto-generated, also indicates which merchandise column is the source. Default Value: None

Accessing the Business Rule Property Manager Utility

This section provides an overview of the Business Rule Property Manager security, navigation, and filters.

Security and the Business Rule Property Manager

You may access Business Rule Property Manager rule settings only if:

- Your user account has been assigned the appropriate rights to do so
- The administrator allows the business rule value to be changed at the levels permitted within your user account

Accessing the Business Rule Property Manager:

To begin using the Business Rule Property Manager, log in to the Plan application and proceed in the following way:

- From the Plan main menu click directly on the business rule property manager link.

This opens the business rules screen at the top level of both the merchandise and location hierarchy, including all attributes, see the following figure below:

Figure A–1 Business Rule Property Manager

Once you access the business rules screen, you may view, add, change, or remove business rules only if your user account has been assigned the rights to do so and only at the levels of the merchandise and location hierarchies assigned to your user account.

The left pane of the business rules property manager provides navigation and filters, explained in the following table. The right pane shows the currently selected filters and the business rules that apply to the selected hierarchy levels.

Table A–2 Using Navigation and Filters

To	Do this
Display the next level of either hierarchy	<p>Hover the mouse pointer over each solid right arrow until the next hierarchy level appears. To select a node from a particular level, click that node and then click Filter.</p> <p>For more details, see "Using the Filters" on page A-6.</p>
Display a specific item or store	Select the Find option, enter the item or store identifier, and then click Filter.
Filter the hierarchy levels by attributes	<p>In the Attributes section, select the attribute by which you want to filter the current hierarchy levels.</p> <ul style="list-style-type: none"> To filter with no attributes, select the blank line. To filter by all attributes, select Any. <p>Note: The attributes are unique to your company, so if you have questions about the attributes, see the administrator or an Oracle Professional Services representative.</p>

Table A–2 (Cont.) Using Navigation and Filters

To	Do this
Display inherited business rules (i.e., those set at higher levels in the hierarchy that items created at lower levels inherit)	In the Show Rules section, select the Higher levels with rules option and click Filter.
Display only the filtered level (also called rule set) instead of the filtered level and the rows that precede it	In the Show Rules section, select the Only filtered level option and click Filter. This opens the Business Rules screen at the item level in the merchandise and location hierarchy.
From within the current view, to display only the level(s) at which rule values can be edited	In the Show Rules section, select the Set table levels in view option and click Filter.
Close the Filters section to make more room for the display of business rules	Click the double left-arrow (<<) button. To later display this section, click the double right-arrow (>>) button.

Using the Filters

Business rules may be set on one or more levels in the hierarchies. You can view business rules that are set on a specific hierarchy levels by:

- Browsing through the hierarchies
- Expanding the hierarchies within the grid (right pane)
- Navigating directly to a node in the merchandise or location hierarchy

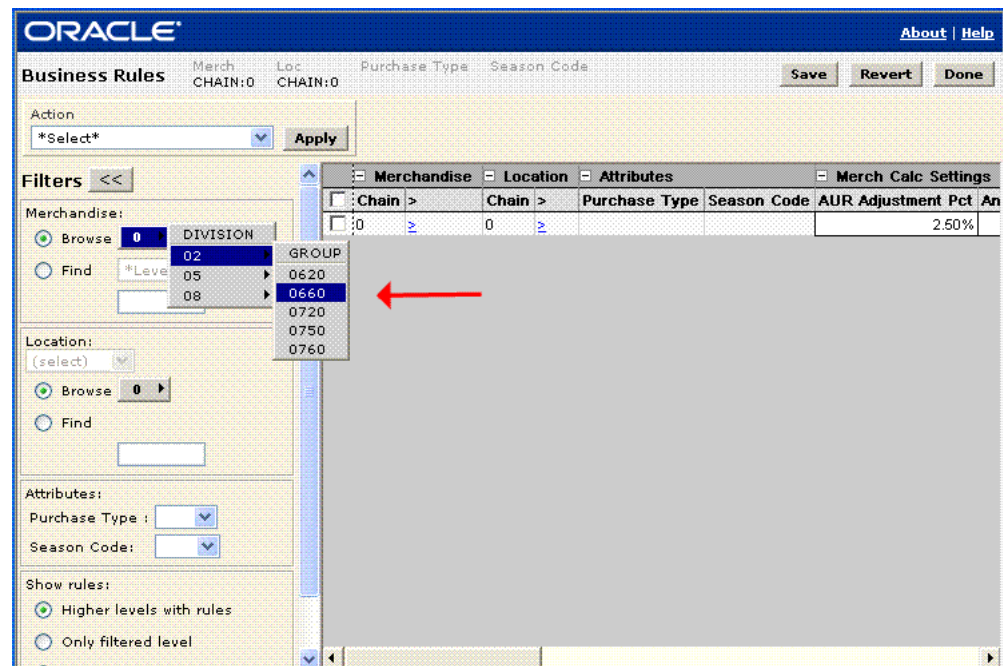
Browsing through the Hierarchies

To navigate through the merchandise or location hierarchies:

1. Click the Browse radio button.
2. Move the mouse pointer to the right arrow next to Browse:
The pointer becomes a hand and the next level of the hierarchy appears.
3. Move the mouse pointer to each successive right arrow until you reach the target hierarchy level.

Following is an example of an expanded merchandise hierarchy using this method.

Figure A-2



4. When you reach the target level and node, click it.
5. Click the Filter button:
The business rule property manager grid (right pane) updates to reflect your hierarchy selection.
6. To traverse back up the hierarchy, hover the mouse pointer over the left arrow of the selected hierarchy level and select a hierarchy level, as in this example.

Expanding the Hierarchies within the Grid

An alternate method to traversing the hierarchies is to expand the hierarchies levels within the grid (right pane).

To expand the hierarchies within the grid:

1. In the merchandise or location hierarchy section of the grid, click the blue angle bracket.
The grid expands by adding a column to show the next level (e.g., Department) and all of its nodes (e.g., Dept. 001, Dept. 002, Dept. 003, etc.).
2. Repeat step 1 until both the merchandise and location hierarchies are expanded to the levels you want.
3. Following is an example of an expanded merchandise hierarchy using this method.

Figure A-3

The screenshot shows the Oracle Business Rules application window. The title bar includes 'ORACLE' and 'About | Help'. The main window has a 'Business Rules' tab and a 'Merch' tab. The 'Merch' tab is active, showing a hierarchy of 'Merchandise' and 'Location'. The 'Merchandise' section is expanded, showing a list of 'DIVISION' and 'GROUP' nodes. A red arrow points to the '0660' node in the 'GROUP' list. The 'Location' section is also expanded, showing a list of 'Chain' nodes. The 'Attributes' section is expanded, showing a list of 'Purchase Type' and 'Season Code' nodes. The 'Merch Calc Settings' section is expanded, showing a list of 'AUR Adjustment Pct' and 'An' nodes. The 'Show rules' section is expanded, showing a list of 'Higher levels with rules' and 'Only filtered level'.

As you expand the hierarchies, observe that the cell borders and text may become gray or black, depending on where the value was set and whether or not you can edit the value at that level. (For more information on Modifying Business Rules, See ["Modifying Business Rule Settings"](#) on page A-9.)

Navigating Directly to a Node in the Merchandise or Location Hierarchy

Rather than browsing through the hierarchies, you can use the find feature to go directly to a node in the merchandise or location hierarchy. A node is an entity on a hierarchy. For example, on the department level of the merchandise hierarchy, some nodes might be Men's Dept., Women's Dept., Children's Dept., Housewares Dept., Sporting Goods Dept., etc.

To use the find feature, you must know the node identifier (e.g., the style, product, or store code or name or whatever is defined for your company).

To navigate directly to a node in the merchandise or location hierarchy:

1. Click the Find radio button.
2. If applicable, from the list box, select what you want to find. For example, the Find list box for merchandise might include Style and Product. The Find list box for stores might include Region and Store.

Figure A-4 The Find Radio Button

The screenshot shows the 'Business Rules' window with tabs for 'Merch' and 'Loc'. The 'Merch' tab is active, showing 'CHAIN:0'. The 'Action' dropdown is set to '*Select*' with an 'Apply' button. The 'Filters' section has a '<<' button and a list of filters. Under 'Merchandise:', the 'Find' radio button is selected, and a dropdown menu is open showing options: '*Level*', 'DEPARTMENT', and 'SUB-DEPARTMENT'. Below this, the 'Location:' dropdown is set to '(select)', and the 'Find' radio button is also selected. The 'Attributes:' section has 'Purchase Type' and 'Season Code' dropdowns. The 'Show rules:' section has 'Higher levels with rules' selected.

3. In the text box, enter the identifier for the node you selected to find in step 2 (e.g., style, product, region, store, etc.).
4. Use the scroll bar to locate the Filter button below the Filters section. Click the Filter button.
5. If the business rule property manager locates the node, the right pane updates with the match. Otherwise, a message appears indicating that the node could not be found.

Adding Business Rules

The set of business rules available in business rule property manager and the levels at which you can manage them are configured during your company's implementation of Plan. While you may change existing business rule settings on different levels in the merchandise and location hierarchies (depending on the business rule property manager role and hierarchy levels assigned to your user account), you cannot add new business rules to the system. If you think a new business rule needs to be added, see the Plan administrator or an Oracle professional services representative.

Otherwise, you can manage business rules as follows:

- To change the values of existing business rules see, ["Modifying Business Rule Settings"](#) on page A-9.
- To copy business rule values and paste them to another portion of the merchandise and location hierarchy (and optionally an attribute), see ["Copying Business Rule Settings"](#) on page A-11.

Modifying Business Rule Settings

You may modify business rule settings if:

- Your user account has been assigned the rights to do so
- Your user account has rights to the merchandise and location hierarchy levels you need to access

- The rule is allowed to be modified. Depending on the implementation at your site, the administrator may prohibit one or more rules from being changed. In addition, the administrator may also limit rules from being changed at specific hierarchy level and optionally attribute combinations.

Before you modify business rule settings, make sure you understand that lower levels in the merchandise and location hierarchies inherit the changes you make at higher levels. See "Rule Settings and Inheritance" on page 173 for details.

Note: Rule values may be null only if that was set as the default value during Plan implementation. To enter null value, type NONE in place of the value.

To modify business rules:

1. Access Business Rule Property Manager. (If you are unsure of how to do this, see ["Accessing the Business Rule Property Manager Utility"](#) on page A-4.)
2. On the Business Rules screen, scroll horizontally to find the business rule whose value you want to change.

Figure A-5 Changing a value in a category

The screenshot shows the Oracle Business Rules interface. The top navigation bar includes 'About' and 'Help' links. Below the navigation bar, there are tabs for 'Business Rules', 'Merch CHAIN:0', 'Loc CHAIN:0', 'Purchase Type', and 'Season Code'. On the right side of this bar are 'Save', 'Revert', and 'Done' buttons. The main interface is divided into two panels. The left panel contains search and filter options: an 'Action' dropdown set to '*Select*' with an 'Apply' button; radio buttons for 'Browse' and 'Find' (selected) with a search box containing '*Level*'; a 'Location' section with a '(select)' dropdown, 'Browse' radio button, and 'Find' radio button with a search box; an 'Attributes' section with 'Purchase Type' and 'Season Code' dropdowns; and a 'Show rules' section with radio buttons for 'Higher levels with rules' (selected), 'Only filtered level', and 'Settable levels in view'. A 'Filter' button is at the bottom of the left panel. The right panel displays a table titled 'Merch Calc Settings'. The table has columns: 'Action', 'AUR Adjustment Pct', 'Annual Basics Plan Min', 'Safety Stock', and 'Tolerance Pct'. The first row shows a value of '3.00%' in the 'AUR Adjustment Pct' column, '12' in 'Annual Basics Plan Min', '14' in 'Safety Stock', and '10.00%' in 'Tolerance Pct'. The table is partially obscured by a gray area.

3. If applicable, modify the business rule value:

The black and gray borders and text indicate the following:

- A black border indicates an "edit box", meaning that you can edit the value in this cell. A gray border indicates that you cannot edit the value (as determined by the implementation of Plan at your company).
 - Black text indicates that the value was set at this level; gray text indicates that the value was inherited.
4. When you have changed the business rule values as necessary, click Save.

Reminder: Lower levels of the hierarchies inherit values from the higher levels.

Copying Business Rule Settings

Copy business rules settings so that you may paste them to another hierarchy level/attribute combination.

Note the following:

- You may access only the levels of the hierarchy that are assigned to your user account.
- There may be some restrictions on the rules you can copy or paste.
- Copying business rule settings is actually a two-phase process - copying the settings and then pasting them to another hierarchy level / attribute combination.

Before you copy business rule settings, make sure you understand that lower levels in the merchandise and location hierarchies inherit the changes you make at higher levels. For details, see ["Understanding Business Rules"](#) on page A-2.

To copy business rule settings:

1. Access Business Rule Property Manager. (If you are unsure of how to do this, see ["Accessing the Business Rule Property Manager Utility"](#) on page A-2.)
2. Use the filter options to navigate to the rule set, which is the set of rule values assigned to a specified merchandise and location hierarchy level and optionally an attribute, whose rule values you want to copy. (If you are unsure how to do this, see ["Using the Filters"](#) on page A-6.)
3. Select a rule set by clicking the left most check box for the row that contains the rule set.
4. From the Action list, select Copy rule values and click Apply.

The Copy Business Rules dialog box appears.

5. On the Copy Business Rules dialog box, clear the check box for the rules whose current values you do not want to copy and then click Copy.
6. Use the filter options to navigate to the rule set you want to update with the copied values.

Reminder: When you update values at higher levels, the lower levels inherit those values.

7. Click the check box next to the rule set and from the Action list, select Paste rule values and click Apply.

Provided the rules are allowed to be updated, the rule set is updated with the copied values.

The business rule settings you pasted take effect immediately.

Deleting Business Rule Settings

Delete a business rule setting when you want to remove the setting for that level (merchandise/location hierarchy and attribute combination) and let that level inherit the setting from the next higher level. Likewise, levels below the level from which you delete a setting will also inherit the new setting unless they already have a value that is set explicitly. (For more information, see ["How Do Hierarchies and Inheritance Work with Business Rules?"](#) on page A-2.)

Deleting the setting for a business rule does not remove the business rule from the Business Rule Property Manager, and it does not delete the rule from Plan.

You can delete business rule settings in the following ways:

- One Rule Setting at a Time
- Multiple Rule Settings at a Time

Note: When you delete top-level rule values, those values are replaced with the default values set during Plan implementation. Rule values can be null only if that was set as the default value during Plan implementation. To enter a null value, type NONE in place of the value.

One Rule Setting at a Time

To delete one business rule setting at a time:

1. Access Business Rule Property Manager.
2. Use the filter options to navigate to the rule set, which is the set of rule values assigned to a specified merchandise and location hierarchy level and optionally an attribute, whose rule values you want to delete. (If you are unsure how to do this, see ["Using the Filters"](#) on page A-6.)
3. Click in the cell of the rule whose value you want to delete and press the Delete key.

Note: Values are removed only if the rule is allowed to be edited at that level. (A black cell border indicates an edit box; a gray cell border indicates a rule value that cannot be edited.)

Cells whose rule values were removed are updated in a pale green shade.

4. Do one of the following:
 - Click Save to update the pale green cells to the default rule values
 - Enter one or more values and then click Save.

The Business Rules screen updates with the inherited values.

Multiple Rule Settings at a Time

To delete one business rule setting at a time:

1. Access Business Rule Property Manager.
2. Use the filter options to navigate to the rule set, which is the set of rule values assigned to a specified merchandise and location hierarchy level and optionally an attribute, whose rule values you want to delete. (If you are unsure how to do this, see ["Using the Filters"](#) on page A-6.)
3. Select a rule set by clicking its left most check box.
4. From the Action list, select Delete selected rules and click Apply.

The Delete Business Rules dialog box appears.

5. On the Delete Business Rules dialog box, clear the check box for the rules whose current values you want to retain and then click Delete.

Note: Values are removed only if the rule is allowed to be edited at that level. (A black cell border indicates a rule value that can be edited; a gray cell border indicates a rule value that cannot be edited.)

Cells whose rule values were removed are updated in a pale green shade.

6. Do one of the following:
 - Click Save to update the pale green cells to the default rule values.
 - Enter one or more values and then click Save.

Viewing Business Rule History

View the history of business rule changes when you are interested in an audit trail of what changes were made when. You may also view a business rule value that was in effect for a particular item on a particular date.

To view business rule history:

1. Access Business Rule Property Manager.
2. Use the filter options to navigate to the merchandise and location hierarchy levels you are interested in. (If you are unsure how to do this, see ["Using the Filters"](#) on page A-6.)
3. From the Action list, select View rule history and click Apply.

The Business Rule History dialog box appears.

4. From the Rules list box, select the rule whose history you want to view, and in the Changes between text boxes, enter the dates for which you want to view the history.

To view a business rule value that was in effect for a particular date, enter the target date in both date text boxes (i.e., enter the target date as both the start date and the end date). The result is all the rule values that would apply via inheritance. The value on the target date is the one with the highest precedence.

The number of weeks available to you is dependent on how Plan is configured for your company.

5. Click View.

The Business Rule History screen appears with the history for the specified rule at the hierarchy levels you selected in step 2.

This screen is organized by merchandise and location hierarchy levels and then by date, with the newest date at the top of each merchandise/location grouping and the oldest date at the bottom of each merchandise/location grouping. Thus, by viewing from bottom to top, you can see how a value was modified over time.

- The Start Dt and End Dt columns show you the range of time for which the business rule and its value were effective. This can help you to determine if one or more weekly optimizations were affected by a particular business rule.
 - The User column displays the user name of the person who made the change.
6. To print or export the rule history, from the Action list select Print or Export and then click Apply. Otherwise, click Done to return to the Business Rules screen.

Managing User Accounts

This section includes the following information:

- [About User Management](#) on page A-14
- [Plan User Account Roles](#) on page A-15
- [Managing User Accounts](#) on page A-17
- [Working with the User Management User Interface](#) on page A-22
- [Troubleshooting User Management Errors](#) on page A-24

Important: If you are using Merchant Desktop and MicroStrategy, ensure that MicroStrategy has been installed and the RMIServer service running before creating user accounts. For information about installing MicroStrategy, see the *Installation Guide*. For information about Merchant Desktop and MicroStrategy user account integration, see [Merchant Desktop Roles](#) on page A-15.

About User Management

The User Management utility enables you create, modify, and inactivate user accounts. User accounts enable you to provide user-specific access control permissions.

There are two ways to manage user accounts:

- If you need to manage multiple user accounts all at once, use the Bulk Loader as described in the *Configuration Guide*.
- If you need to add or modify one or two user accounts, use the User Management user interface as described in this section.

The Oracle Retail Plan access control permissions consists of a combination of *roles* (the scope of actions a user can perform) and *hierarchy levels* (the scope of business data a user can access). You can assign as many roles and hierarchy levels to a user account as necessary.

About User Account Roles

A *role* specifies the scope of actions a user is allowed to perform. Each Oracle Retail application comes with a set of default user account roles. If you need to add user account roles or modify the actions available for user account roles, use the Bulk Loader XML files as described in the *Configuration Guide*.

About Hierarchy Levels

A *hierarchy level* defines the scope of business data a user has permissions to access. Hierarchy level consists of the combination of the following:

- Location Hierarchy
- Merchandise Hierarchy

About Assigning Roles and Hierarchies

Important: Setting the location hierarchy level below the Chain level is not supported in the Plan application and may result in unpredictable behavior.

If you assign the top level of both the merchandise and location hierarchies to a role, the user has access to all hierarchy levels for that role.

If you want the user to have access to a specific merchandise hierarchy, you do so by specifying the roles and their associated hierarchies. For example, to assign a user permissions to submit for only Departments 314 and 327 for all locations, you would add two "submit" roles to the user account and assign a specific merchandise hierarchy to each role, as shown below:

PLAN_SUBMITTER - Merchandise Department 314 and Location Chain

PLAN_SUBMITTER - Merchandise Department 327 and Location Chain

- [Plan User Account Roles](#)
- [Managing User Accounts](#)
- [Working with the User Management User Interface](#)

Plan User Account Roles

Plan ships with the following types of user account roles:

- [User Management Roles](#)
- [Merchant Desktop Roles](#)
- [Plan Roles](#)

User Management Roles

User Management roles enable the Plan administrators to add, modify, and remove user accounts. Review the list below to determine which User Management roles to assign a user. For example, you may want to assign one user the ability to create user accounts but assign a different user the ability to assign roles to those accounts.

When a user who has been assigned User Management roles logs in, the User Management link on the main menu opens to the User Management utility. When a user who has not been assigned User Management privileges logs in, the User Management link opens to a password management dialog box.

Plan comes with the following User Management roles:

- UM_USER_ADMIN - This role allows creating new user accounts. It does not allow assigning roles.
- UM_ROLE_ASSIGNER - This role allows assigning roles to existing user accounts. It does not allow creating or deleting user accounts. A person who uses this role must understand the available merchandise and location hierarchies as described in [About Hierarchy Levels](#) on page A-14.
- UM_READ_ONLY_ADMIN - This role has privileges to view the list of users and their access permissions. This role does not allow adding, modifying, or deleting user accounts.

Merchant Desktop Roles

Merchant Desktop comes with the following set of business-related roles:

- MD_USER - This role has read-only access to the view and all of the screens and components it contains. It also includes access to the MicroStrategy reporting application.

Assign this role when you want to ensure that a user cannot make any changes and that they always receive updates from you.

- MD_POWER_USER - This role has rights to personalize views, to create and remove screens and components, and to set individual parameters as allowed by the Merchant Desktop administrator. This role has access to the MicroStrategy reporting application. Power users can copy and modify reports, but they cannot create reports.

Assign the power user role when you want to allow a user to make changes. However, be aware that to ensure that their changes are preserved, you cannot automatically update some elements of their view or screens.

- MD_ADMINISTRATOR - This role has all rights to create, modify, and remove views, screens, components, and reports. This role has rights to set permissions for several parameters for power users.

The administrator role includes full access to the MicroStrategy reporting application. Only administrators can create reports.

- MD_REPORT_ADMIN - Supplied by Oracle Professional Services. This role has the same permissions as the MD_POWERUSER role plus MicroStrategy permissions. This additional level of permissions provides a more intuitive and flexible interface for creation of reports. The Report Tab is available to these users.

Merchant Desktop and MicroStrategy User Integration Because of the relationship between Plan User Management and the MicroStrategy, be aware of the following:

- As long as the RMIServer service is running while you are creating user accounts, any Plan user account that you create that includes a Merchant Desktop role is *automatically* imported into the MicroStrategy users database.

As a result, use Plan User Management—not MicroStrategy—when managing user accounts.

- Any changes you make to the MicroStrategy users database are not imported back to the Plan User Management user database.

As a result, use Plan User Management—not MicroStrategy—when managing user accounts.

- The user names that you create in Plan are case-sensitive, but the MicroStrategy user names are not.

For example, Plan treats "Admin" and "admin" as two unique user accounts. However, MicroStrategy treats them as the same user name and expects the same password for both of these user accounts.

If you add a new account whose user name differs only in case to an existing user name, the MicroStrategy password for that duplicate name is changed to match that of the new user.

As a result, avoid using upper-case and lower-case to differentiate between user names.

Plan Roles

Plan comes with the following set of business-related roles:

- PLAN_BIZADMIN
 - Read, write, create, delete, submit, and publish a plan to the Retail Data Mart in advance of the nightly batch process.
 - Perform and save What-If calculations.
 - Modify business rule properties.

- PLAN_SYSADMIN
 - Read, write, create, delete, submit, and publish a plan to the Retail Data Mart in advance of the nightly batch process.
 - Perform and save What-If calculations.
- PLANNER
 - Read, write, create, and delete a plan.
 - Perform and save What-If calculations.
- PLAN_VIEWER
 - View-only access to a plan.
 - Perform What-If calculations but cannot save them.

Managing User Accounts

You manage user accounts by means of an administrative user account. When you log into the application using the root account, the User Management utility is automatically available.

To manage user accounts:

1. Open a browser and enter the application URL, similar to the following.

`https://servername:portnumber/plan/PlanLogin.do`

The login screen appears.

2. Enter the root user name and password and click **Login**.

The application main menu appears with the User Management link.

3. Click the **User Management** link.

The Manage Users screen appears with a list of any user accounts that have already been created.

For information about creating user accounts, see [Creating a User Account](#) on page A-18.

To quit User Management, click the **Close** link. The application main menu appears.

Changing the Password for the root Account

The root account has a default password. For security reasons, you may want to change the password.

To change the password for the root account:

1. From the Manage Users screen, Action list, select **Change Password** and click **Apply**.

The Set Root Password for user: root dialog box appears.

2. In the **Old Password** text box, enter the existing password, and in the **New Password** and **Confirm New Password** text boxes, enter the new password you want.

Reminder: Passwords are case-sensitive.

3. When the dialog box is complete, click **Done**.

You must use the new password the next time you attempt to log on using the root account.

Creating a User Account

Each person logging into Plan needs a user account. Each user account has specific access control permissions that determine what task a user can perform.

There are two ways to create user accounts:

- If you need to create multiple user accounts all at once, use the Bulk Loader as described in the *Configuration Guide*.
- If you need to add or modify one or two user accounts, use the User Management user interface as described in this section.

To create a user account:

1. From the Manage Users screen, Action list, select **Add New User** and click **Apply**.
The Add New User dialog box appears.
2. Complete the **Add New User** dialog box fields as shown in the following table.

Field	Description
User Name	Required. The user name must be unique for each user. The user name is case-sensitive and can be up to 50 characters (letters, numbers, and symbols) long. For example, Buyer, buyer, and BUYER are all considered to be unique. In general, avoid using upper and lower case to differentiate between accounts. This is especially important if you are using Merchant Desktop and MicroStrategy. For more information, see Merchant Desktop Roles on page A-15.
Password	Required. The password is associated with the user name, and both are required to log on. The password is case-sensitive and can be up to 50 characters (letters, numbers, and symbols) long. For example, Secret, secret, and SECRET are all considered to be unique.
First Name	Optional, up to 50 characters. Helps you to identify the person assigned to a user name. For example, if your user names are generic labels (such as WomensBuyer001 and MensBuyer300), this information enables you to identify which employee is assigned to a specific user name.
Last Name	Optional, up to 50 characters. Helps you to identify the person assigned to a user name.
MI (middle initial)	Optional, 1 character. Helps you to identify the person assigned to a user name.
Title	Optional, up to 50 characters. Helps you to identify the person assigned to a user name.
Employee ID	Optional, up to 10 numbers. The employee ID is available for your internal use.

3. When the fields are complete, click **Done**.

The Manage Users screen appears with the user name and related identifiers added.

Now that the user account is created, you must assign the appropriate access control permissions as described in [Assigning Roles and Hierarchy Levels to a User Account](#) on page A-19.

Assigning Roles and Hierarchy Levels to a User Account

Each user account must have one or more role associated with the applicable hierarchies. For information about roles and hierarchies, see [About User Management](#) on page A-14.

Important: If you are using Merchant Desktop, see [Merchant Desktop Roles](#) on page A-15.

Note: You can only add user roles one at a time from the graphical user interface. For instructions on how to add multiple roles all at once, see information about the Bulk Loader as described in the *Configuration Guide*.

To assign roles to a user account:

1. From the Manage User screen, click the check box next to the user account to which you want to assign roles.
2. From the Action list, select **User Roles** and click **Apply**.
The Role Assignment for username screen appears.
3. From the Action list, select **Add Role Assignment** and click **Apply**.
The Add Role Assignment dialog box appears.
4. From the **Role** list box, select the role you want to assign to this user account. For details on the default roles supplied with the application, see [Plan User Account Roles](#) on page A-15. Note that your implementation may have additional customized roles as well.
5. For any business-related role (any role except for User Management roles) specify the Chain levels for the Location hierarchy and any appropriate level for the Merchandise hierarchy.

To navigate down the hierarchy, hover your mouse pointer over the right arrow in the Merchandise or Location hierarchy. Keep navigating until the target level appears, and then click it.

Role	Merchandise	Location
MD_USER	◀ DIVISION: 32 ▶	◀ DISTRICT: 100070 ▶

- To navigate down a hierarchy, use the right arrow.
 - To navigate up a hierarchy, use the left arrow.
6. When you have selected the role and any applicable hierarchy levels, click **Done**.
The Role Assignment for username screen updates with the role and hierarchy levels added.
If an error message appears instead, see [Troubleshooting User Management Errors](#) on page A-24.
 7. Repeat steps 3 through 6 to add as many roles as necessary. When you are finished adding roles, click **Done** to return to the Manage Users screen.

Note: If you add different roles that have the same hierarchy levels, the level with the most privileges is used when the user logs on. For example, if you add a read-only role and a power user role for the same hierarchy, the role with the most privileges takes precedence.

Modifying User-Related Information

Modifying a user account involves changing the information associated with the user name, password, first name, and last name. Typically, you would modify a user account in a situation where the required activities remain the same, but personnel have been reassigned to other tasks.

If you want to change the access control permissions associated with a user account, see [Modifying Role and Hierarchy Assignments](#) on page A-20.

Note: You can only modify user accounts one at a time from the graphical user interface. For instructions on how to modify multiple accounts all at once, see information about the Bulk Loader as described in the *Configuration Guide*.

To modify a user account:

1. On the Manage Users screen, click the check box next to the user account you want to modify.
2. From the Action list, select **Edit Existing User** and click **Apply**.
The Edit User screen appears.
3. Change the field values as necessary.
4. Click **Done**.

The Manage Users screen appears with the updated information.

Changes to a user account are effective the next time the user attempts to log on.

Modifying Role and Hierarchy Assignments

For each user account, you can do the following:

- Add or remove roles
- Change the hierarchy levels associated with a specific role

Note: You can only modify roles and roles assignments one at a time from the graphical user interface. For instructions on how to add multiple roles all at once, see information about the Bulk Loader as described in the *Configuration Guide*.

To modify a role:

1. From the Manage Users screen, click the check box next to the user account whose roles or hierarchy levels you want to modify.
2. From the Action list, select **User Roles** and click **Apply**.
The Role Assignment for username screen appears.
3. From the Action list, select **User Roles** and click **Apply**.

Do one of the following.

To	Do this
Assign a role	<p>From the Action list, select Add Role Assignment and click Apply. For a list of available roles, see Plan User Account Roles on page A-15.</p> <p>On the Add Role Assignment dialog box, select a role and its associated Merchandise and Location hierarchy levels.</p> <p>Click Done.</p>
Change the hierarchy levels	<p>Click the check box next to the role for which you want to change the hierarchy levels. For information about hierarchy levels, see About Hierarchy Levels on page A-14.</p> <p>From the Action list, select Edit Role Assignment and click Apply.</p> <p>On the Edit Role Assignment dialog box, select the new Merchandise and Location hierarchy levels. (Alternatively, you could select a new role and keep the hierarchy levels.)</p>
Remove a role	<p>Caution: There is no undo, and there is no confirmation dialog box.</p> <p>Click the check box next to the role you want to remove.</p> <p>From the Action list, select Delete Role Assignment and click Apply. The role is removed immediately.</p>

If you need to add more roles and hierarchy levels, repeat step 3.

4. When the Role Assignment for username screen reflects your requirements, click **Done**.

The change take effect the next time the user logs on.

Inactivating User Accounts

Inactivating a user account makes the user name and password invalid for logging on.

When you inactivate a user account, that account is preserved in the database for reports and historical data, but the account can never be reactivated. Use caution when inactivating a user account.

Important: Inactivating a user account is permanent. There is no undo function. If you decide later that you need this account, you must create a new one.

If you simply want to remove access to a product or to an area of the hierarchies for a specific user account, see [Modifying Role and Hierarchy Assignments](#) on page A-20. If you want to reassign a user account to another person, see [Modifying User-Related Information](#) on page A-20.

To inactivate a user account:

1. On the Manage User screen, click the check box next to the user account you want to inactivate.
2. From the Action list, select **Inactivate User** and click **Apply**.

A confirmation dialog box appears.

3. If you want to inactivate this user account, click **Yes**.

The Manage Users screen appears, and the number 2 appears in the Active column, indicating that this user account is inactive. If anyone attempts to use this account, the login will fail.

Working with the User Management User Interface

The User Management user interface enables you work with the user accounts you have created as follows:

- [Sorting Columns](#)
- [Rearranging Columns](#)
- [Hiding Columns](#)
- [Printing and Exporting User Account Information](#)

Sorting Columns

You can sort the data displayed on the following User Management screens:

- Manage Users
- Role Assignments for username

To sort the user and user roles data displays:

1. From the Action list, select **Sort Table** and click **Apply**.

The Customize Table dialog box, Sort Table tab appears.

2. Enter sort criteria as follows:

- a. Select a column from the first list box.

This column becomes the primary sort column for the data display.

- b. For that column, select a sort order, either ascending order (A - Z or 1 - 10) or descending order (Z - A or 10 - 1).

- c. If you want the to sort the data by additional columns, select a column and sort order for the remaining two list boxes.

Note: To remove one or more of the sort criteria, click ***Select*** from the list boxes.

3. When the list boxes and sort order reflect the way you want the data to be sorted, click **Done**.

The Customize Table dialog box closes, and the data display is updated to the sort order you selected. The sort order remains in effect until you next change it.

- [Rearranging Columns](#)
- [Hiding Columns](#)
- [Printing and Exporting User Account Information](#)

Rearranging Columns

You can rearrange and hide columns on the following User Management screens:

- Manage Users
- Role Assignments for username

To rearrange columns:

1. From the Action list box, click **Modify Columns** and click **Apply**.
The Customize Table dialog box, Change Columns tab appears.
 2. In the Visible columns list box, select the column whose position you want to change.
 3. Click the up or down arrow until the column is in its target location.
 4. Repeat steps 2 and 3 as many times as necessary.
 5. When the Customize Table dialog box reflects your settings, click **Done**.
The Customize Table dialog box closes and the screen updates with your modifications.
- [Sorting Columns](#)
 - [Hiding Columns](#)
 - [Printing and Exporting User Account Information](#)

Hiding Columns

You can hide columns on the following User Management screens:

- Manage Users
- Role Assignments for username

To hide (or unhide) columns:

1. From the Action list box, click **Modify Columns** and click **Apply**.
The Customize Table dialog box, Change Columns tab appears.
 2. Do one of the following:
 - To hide a column:
In the Visible Columns list box, select the column you want to hide.
Click the left arrow to move the column to the Hidden Columns list box.
 - To show a column:
In the Hidden Columns list box, select the column whose position you want to change.
Click the right arrow to move the column to the Visible Columns list box.
 3. Repeat step 2 as many times as necessary.
 4. When the Customize Table dialog box reflects your settings, click **Done**.
The Customize Table dialog box closes and the screen updates with your modifications.
- [Sorting Columns](#)
 - [Rearranging Columns](#)
 - [Printing and Exporting User Account Information](#)

Printing and Exporting User Account Information

When you print or export information:

- Only visible columns are printed or exported.

For example, if you chose to hide some columns (see [Hiding Columns](#)), the data in those columns is not included in the print out or the Excel file. (Likewise, data that is filtered out or hidden in a collapsed row is exported or printed.)

- Information is printed or exported in the current sort order. (To change the sort order, see [Sorting Columns](#) on page A-22).

To print or export user account information:

- From the Action list on the screen you want to print, or from which you want to export, select Print or Export and click **Apply**.

The Print or Export dialog box appears with a reminder that only the visible data will be printed or exported. The dialog box also indicates the number of rows and the columns, which helps you to estimate how long the print or export process will take.

- Do one of the following:

To	Do This
Print the user data on the screen (not the screen itself)	Click Print and complete the resulting print dialog box as you normally would.
Export the data to a Microsoft Excel spreadsheet	Click Send to Excel. On the resulting Save As dialog box, enter a file name and click Save. An "Export Complete" message appears along with the path and file name of the Excel file, and the Excel file opens automatically.

- [Sorting Columns](#)
- [Rearranging Columns](#)
- [Hiding Columns](#)

Troubleshooting User Management Errors

This section enables you to troubleshoot user management errors as follows:

- [MicroStrategy Users Licenses Exceeded](#) on page A-24
- [MicroStrategy Users Table General Failure](#) on page A-25
- [MicroStrategy Failure Connecting to the Remote Registry](#) on page A-25
- [Unable To Perform Request: System Error](#) on page A-25
- [User Cannot Log In](#) on page A-25

MicroStrategy Users Licenses Exceeded

When you attempt to add a Merchant Desktop role to a user account, the following message appears:

Unable to update the MicroStrategy Users table: licenses exceeded.

This error can occur when you have not updated the usermanagement.properties file for the number of MicroStrategy licenses you are using.

Solution

Correct this problem as follows:

- Open the usermanagement.properties file.

```
<INSTALL_BASE>\config\usermanagement\ usermanagement.properties
## MicroStrategy user limit microstrategy.users.max=0
```

2. Change the microstrategy.users.max value to the number of user licenses you have purchased.
3. Save the file and restart your application server.

MicroStrategy Users Table General Failure

When you attempt to add a Merchant Desktop role to a user account, the following message appears:

Unable to update the MicroStrategy Users table: General failure.

This error can occur for several reasons, mainly in the following categories. It occurs when you the string is built and posted to the MicroStrategy server. Check the following:

- ###MerchantDesktop Report Server rmiHost=ReportingServerName rmiPort=44499# In most cases, rmiHost and reportServer should be the same reportServer=ReportingServerName administratorName=administrator administratorPassword= mdProject=Merchant Desktop
- There is a mismatch between the hierarchy level names that User Management is using and those that are defined in Merchant Desktop.
- The MicroStrategy server is down.

MicroStrategy Failure Connecting to the Remote Registry

When you attempt to add a Merchant Desktop role to a user account, the following message appears:

MicroStrategy Integration: General failure connecting to the remote registry.

Solution

This error can occur when the RMIServer service is not running.

- Make sure you have installed the MicroStrategy User Management Integration Server as described in the *Installation Guide*.
- Once the MicroStrategy User Management Integration Server is installed, verify that the RMIServer service is running. (On the MicroStrategy server, select Start > Settings > Control Panel > Administrative Tools > Services.)

Unable To Perform Request: System Error

The following error message can occur in a variety of circumstances:

Unable to perform request due to system error

Solution

Perform the following:

- Verify that the network is not having problems.
- Verify that the User Management database is available.

User Cannot Log In

A user reports that their username and password combination is no longer working.

Solution

Log in problems are usually due to case-sensitivity issues. To solve this problem, perform the following:

- Make sure that the user has not selected the Caps Lock key.
- If you have recently changed their password or username, it is possible that Internet Explorer is storing the former password. This can occur when the only change in the user name or password is case.
- If you added a Merchant Desktop account whose user name differs only in case to an existing user name, the MicroStrategy password for that "duplicate" name is changed to match that of the new user. See [Merchant Desktop and MicroStrategy User Integration](#) on page A-16.

Report Administration

This section includes the following information:

- [About Reports](#) on page A-26
- [Creating Reports](#) on page A-27
- [Post-Installation Configuration](#) on page A-28

About Reports

The Merchant Desktop reporting system is provided by MicroStrategy Web Universal, and only Merchant Desktop administrators and Report administrators can create reports. Users can copy the reports you create, modify them, and save them to their own directories.

Your access to MicroStrategy Web Universal is seamless. Once you log on to Merchant Desktop, you are logged on to MicroStrategy Web Universal., which appears within the Merchant Desktop Reporting screen.

When you access reports or graphs, click the MicroStrategy help icon for information on how to subscribe to reports, customize and save reports, etc.

Accessing Reports

Merchant Desktop provides you with a variety of ways to access reports.

- Reporting screen that displays the Share and My Reports folders
- A screen that is named for a specific report
- A component within a screen

Only a Merchant Desktop administrator or Report administrator can create reports for the Share folder, but you can access every report in this folder.

- Administrators have all access to the Merchant Desktop and MicroStrategy web professional privileges.
- Report administrators have personalization privileges within the Merchant Desktop and MicroStrategy web professional privileges.

From these shared reports, you can create your own copy of a report and save it to a folder called My Reports. Within your My Reports folder, you can create as many additional folders as necessary.

Report Data

Because MicroStrategy desktop caches reports, daily (or weekly) updates to the RDM may not be reflected in the reports until users re-execute the report. The other option is to purge the MicroStrategy cache. For instructions, see the MicroStrategy documentation.

Creating Reports

You can create reports only if you have Merchant Desktop administrator privileges or Report administrator privileges.

Note: The reporting system is provided by MicroStrategy Web Universal. When you access reporting, click the MicroStrategy help icon for information on how to subscribe to reports, customize reports, etc. The procedure below is provided solely to give you the very high level steps to get you started, and it documents only one way to create reports. It is recommended that you read the MicroStrategy help and any printed manuals thoroughly before creating or modifying reports.

To create reports:

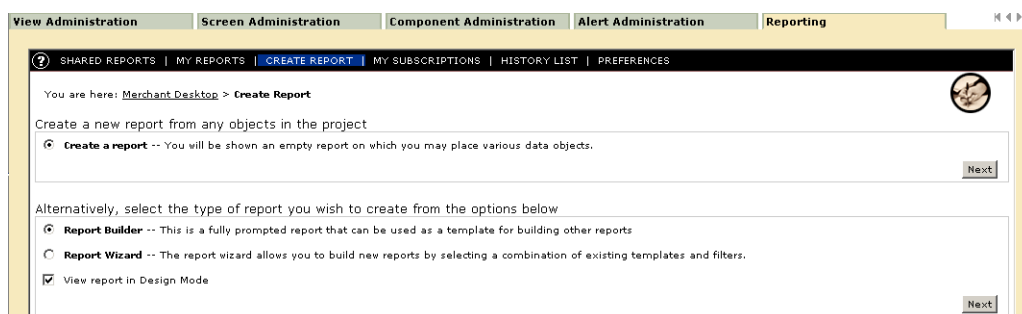
1. Click the Reporting tab.

The Reporting screen appears with MicroStrategy Web Universal options.



2. Click the Create Reports icon.

The MicroStrategy Web Universal Create Report screen appears.



3. Select the Create a report option and click Next.

A blank report screen appears.

On the Design Mode: Blank Report screen, do the following:

1. Select the hierarchy level by which your report will be organized - Schema Objects > Attributes. In the list of attributes, click the page icons until the

Location Hierarchy or Product Hierarchy selections appear. Click the hierarchy level name and it will appear as a column in the report.

2. Select the metrics for which you want information - Public Objects > Metrics. From the list of folders, select the type of metrics you want to view, page through the metrics until you find the metric you want, and click it to place it in the report
3. To remove any attribute or metric that you have added to the report, right click it and select Remove From Grid.
4. To change column positions, click and drag.
4. Click the Save Report button.
5. From the Autostyle list box, click any style.

When you are creating and modifying reports, attributes, and filters, please note the following:

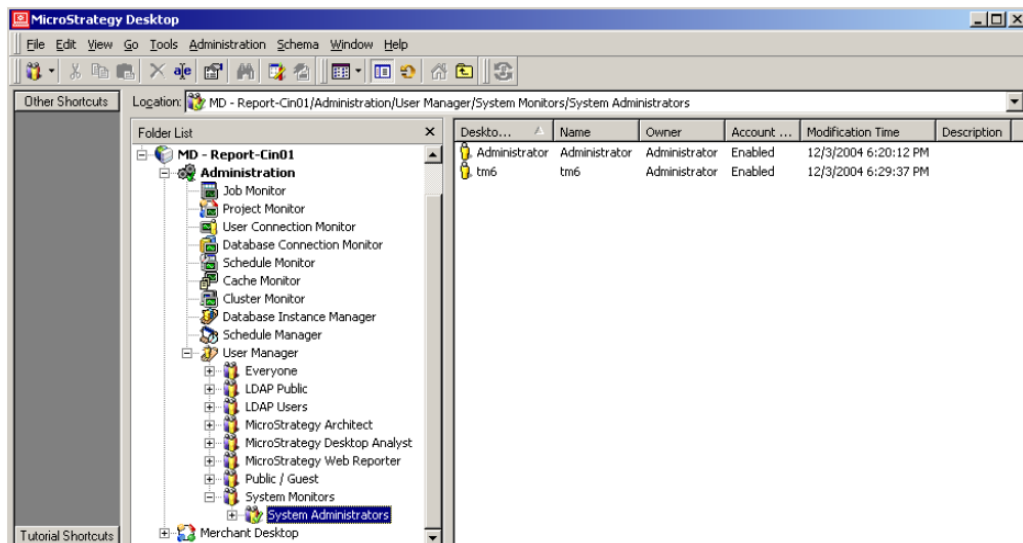
- Do not change the names of the hierarchy attributes (e.g., Product Hierarchy1, Product Hierarchy2, etc.). Doing so will break the filters.

Post-Installation Configuration

MicroStrategy provides an export to PDF option, but it is not supported on all of the Merchant Desktop platforms. Therefore, after Merchant Desktop installed, follow this procedure to ensure that the export to PDF is not available to users. In addition, this procedures explains how to set the history list option.

1. Start the MicroStrategy Desktop application.

The MicroStrategy Desktop application screen appears.

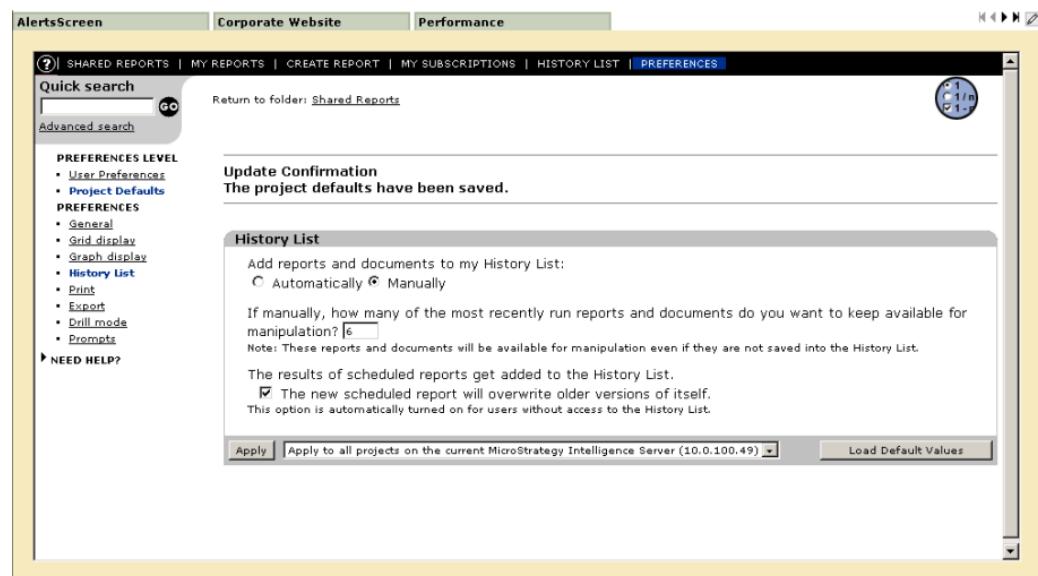


2. Copy a user with the role of MD_ADMINISTRATOR from the Everyone group to the System Administrators group.
3. Open a new browser window, type in the Merchant Desktop URL, and log in as the user you just copied in the MicroStrategy Desktop.

The following screen appears:

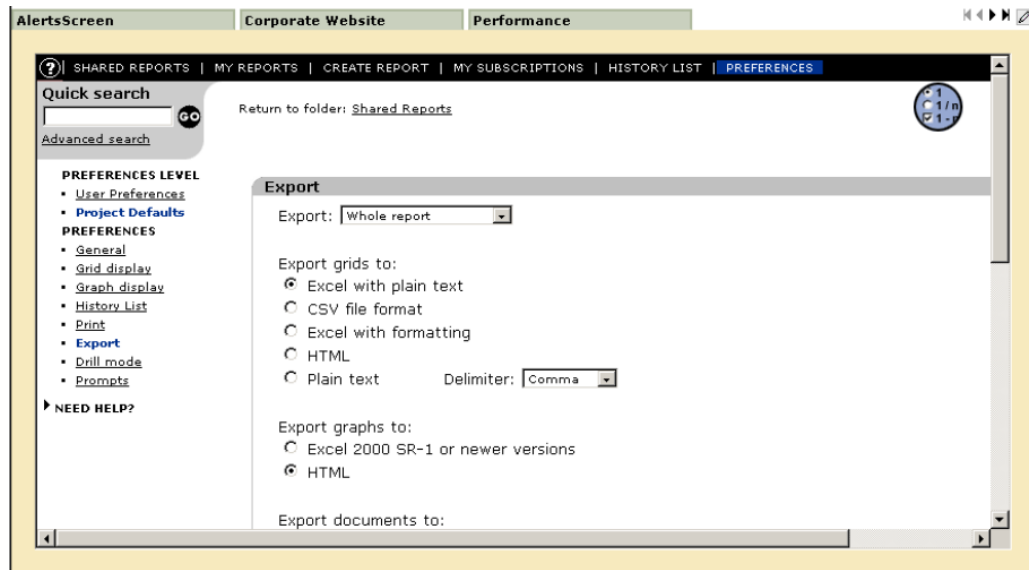


4. Click the Preferences button or link.
5. On the left-hand side of the screen, locate the Preferences Level menu and then click the Project Defaults option.
6. Still on the left-hand side of the screen, locate the Preferences menu and then click the History List option.
7. Make sure the Manually option is selected, and change the value of the number of reports you want to display for manipulation to at least 6, as in the following example.

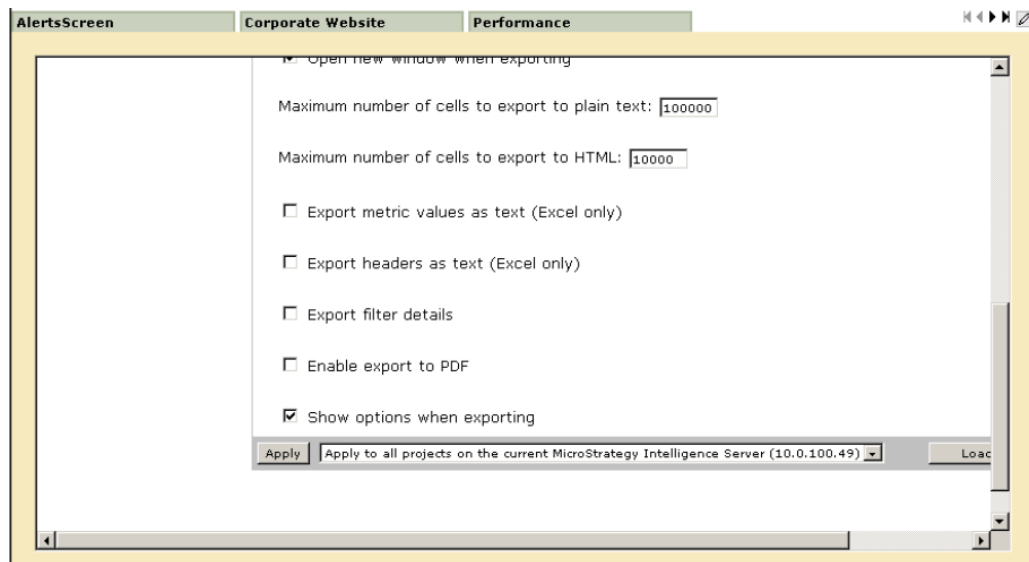


8. Click the Apply button at the bottom left of the screen.
9. Again on the left-hand side of the screen, locate the Preferences menu and then click the Export option.

The following screen appears.



10. Scroll down to the bottom of the screen and uncheck the Enable export to PDF option, as in the example below.



11. Click the Apply button at the bottom left of the screen.
12. Log out of Merchant Desktop.
13. Go back to MicroStrategy Desktop and remove the user that you added in step 2 from the System Administrators group.

Users will now have a history list of at least 6 reports (depending on the value you entered), and the Export to PDF option will not be available to users.

Merchant Desktop Administration

This section includes the following information:

- [Administration Tasks](#) on page A-31
- [Good Practices](#) on page A-33

- [Understanding Updates](#) on page A-33
- [About Views, Screens, and Components](#) on page A-34
- [Modifying and Deploying Sample Views and Their Elements](#) on page A-34
- [Creating and Deploying Views and Their Elements](#) on page A-35
- [Creating a Component](#) on page A-36
- [Creating a Screen](#) on page A-36
- [Adding Components to a Screen](#) on page A-37
- [Creating a View](#) on page A-37
- [Adding Screens to a View](#) on page A-38
- [Assigning a View to a User](#) on page A-39
- [Screen Administration](#) on page A-39
- [Create Screen](#) on page A-41
- [Copy Screen](#) on page A-44
- [Edit Screen](#) on page A-45
- [Delete Screen](#) on page A-47
- [View Administration](#) on page A-47
- [Assign View](#) on page A-48
- [Create View](#) on page A-49
- [Copy View](#) on page A-50
- [Edit View](#) on page A-50
- [Delete View](#) on page A-51
- [Component Administration](#) on page A-52
- [Create Component](#) on page A-53
- [Copy Component](#) on page A-56
- [Delete Component](#) on page A-56
- [Unassigned View](#) on page A-56
- [HTML Component](#) on page A-57
- [HTTP Links Component](#) on page A-57
- [News Feed Component](#) on page A-58
- [Report Component](#) on page A-60
- [Graph Component](#) on page A-60

Administration Tasks

Following is a high-level list of Merchant Desktop administration tasks. You may perform these tasks after a successful installation of Merchant Desktop.

- Managing user accounts - Depending on your implementation of Merchant Desktop, the user accounts may already be created for you by Oracle professional services. You can use the User Management utility to add, modify, or inactivate (remove) user accounts.

When users log on and no view is assigned to them, the following message appears:

Either the View you have been assigned is empty or you are not currently assigned a view. Please contact your administrator for assistance.

If you want to customize this message to include a name, phone number, or email address or something else, see ["Updating the "Unassigned View" Message"](#) on page A-32.

- Managing views screens, and components - This task involves several procedures, and there are several ways to get started as explained in [Getting Started with Views and Their Elements](#). After you have assigned views to users, see ["Understanding Updates"](#) on page A-33.
- Managing reports - This task involves using the MicroStrategy Desktop or Web Universal application to create reports, or to modify any of the reports and graphs that are supplied with Merchant Desktop. See [Chapter 13, "Report Administration"](#).
- Managing desktops - This task involves making sure end user browsers are set up correctly. See ["Checking Your Merchant Desktop Browser Settings"](#) on page 1-4. Use these settings on the administrative computer as well.

Getting Started with Views and Their Elements

If you are not yet sure what "views" are or what a Merchant Desktop screen or component is, see ["About Views, Screens, and Components"](#) on page A-34. Otherwise, there are a few ways for you to get started:

- Copy the sample views, screens, and components supplied with Merchant Desktop and modify them as you want before you deploy them to users. See ["Modifying and Deploying Sample Views and Their Elements"](#) on page A-34
- Start from scratch and create all of your own components, screens, and views. See ["Creating and Deploying Views and Their Elements"](#) on page A-35

Updating the "Unassigned View" Message

To customize the message that appears when users log on and no view is assigned to them (or the view has no screens), follow these steps:

1. Retrieve the UnassignedUser.html file from one of the following locations, depending on which application server your site is using. If your application server is installed to a different location, use that path instead.

WebLogic:

```
../ProfitLogic/modules/MerchantDesktop/MerchantDesktop.ear/dashboard.war/html/UnassignedUser.html
```

WebSphere:

```
../WebSphere51/installedApps/servername/MerchantDesktop.ear/dashboard.war/html/UnassignedUser.html
```

2. Modify the HTML using a text or HTML editor.

An alternative is create a new HTML file using an HTML editor, but you must name it with the same name and capitalization: UnassignedUser.html

3. Copy the new or updated file to the same location in step 1.

The new HTML is available as soon as the file is copied.

Good Practices

- ["Copy the Sample Views, Screens, or Components"](#) on page A-33
- ["Lock Views, Screens, or Components until You Are Ready to Share Them"](#) on page A-33
- ["Test Your Views, Screens, or Components with Test User Accounts"](#) on page A-33

Copy the Sample Views, Screens, or Components

If there is more than one administrator using Merchant Desktop, copy the sample views, screens, or components instead of making changes directly to them. (All samples begin with a "pl - " prefix.) This preserves the original sample views, screens, and components for all other administrators.

For example, the samples are available to all administrators by default. Thus, if you and a few other administrators happen to edit the same screen at the same time, only the last-saved version is preserved. Therefore, it is possible for your changes to be lost. You can avoid this scenario if you copy and rename samples before making changes to them.

Lock Views, Screens, or Components until You Are Ready to Share Them

When you copy a sample or create a new view, screen, or component, make sure that the Allow All Administrators To Access check box is not selected (this is the default). As long as that check box is not selected, other administrators cannot see or change views, screens, or components that you have created. This is helpful when you are in the process of setting up views, screens, and components.

When you are finished setting up your views, screens, and components and you want to share them with other administrators, simply make a copy first and then select the Allow All Administrators To Access check box. Your original copy is then preserved but other administrators can still access the views, screens, or components that you want to share.

Test Your Views, Screens, or Components with Test User Accounts

It is recommended that you assign the sample views to a test user account rather than to your own account. As an administrator, you have special privileges that standard users and power users do not have, and this can affect the functionality of the view, its screens, and its components. When you log on with a test user account, you can see the view exactly the way that users will.

- To create two user accounts (e.g., one standard user and one power user) for testing purposes, see the User Management online help.
- To assign a view to a test user account, see ["Assigning a View to a User"](#) on page A-39

Understanding Updates

After assigning views to users, it's likely that you will change the views by adding new screens, updating components, etc. For standard users, the changes appear automatically the next time users click the affected element (view, screen, or component) or the next time they log on.

To preserve changes that power users have made, however, administrator updates do not affect power users' views or screens. The following table summarizes the differences for standard users and power users.

Table A–3

User account type	Effect of administrative updates
Standard user - read-only with no personalization privileges	Users will automatically receive all of your changes the next time they click the affected element (view, screen, or component), or they will receive the changes the next time they log on.
Power user - personalization (read-write) privileges for views, screens, or components on a per parameter basis determined by administrative settings.	<p>After a power user customizes a view, screen, or component, the following administrative updates have no effect:</p> <ul style="list-style-type: none"> ■ Updates to the changed screen, such as switching component positions or replacing components ■ Updates to the user view, such as the order of screens and setting the home screen. However, new screens are added to the end of the view. <p>Administrative updates to component parameters (such as show/hide title bar, HTML or HTTP source, etc.) are effective as long as the power user has selected the corresponding Use Default check box.</p>

Forcing Updates

You can force updates to power users. However, you must be aware that forcing updates to power users overwrites all of the personalizations that they have made. Once you have forced an update, there is no way to retrieve the power user's personalizations.

Caution: Forcing an update overwrites all personalizations that the power user has made. If you do need to force an update, unassign the view from the power user and then reassign it.

About Views, Screens, and Components

A view is the collection of screens and their components that appear on each user's Merchant Desktop. You can create the views, screens, and components in any order, but it is helpful if you understand how they relate to each other:

- Components are the building blocks of screens, and they contain the actual content. They appear as individual windows on each screen.
- Screens are the building blocks of views, and they serve as containers for components.
- Views are the "packages" that hold the screens (basically, a row of screen tabs). Views are what you deploy to Merchant Desktop users.

Modifying and Deploying Sample Views and Their Elements

If you don't want to start from scratch as explained in *Creating and Deploying Views and Their Elements*, you can start by using the sample views, screens, and components supplied with Merchant Desktop.

1. If you haven't already done so, create one or two test user accounts so that you can review the samples.

See the User Management online help for information.

2. Assign a sample view to one of the user accounts you just created.

See ["Assigning a View to a User"](#) on page A-39.

All sample views are named with a "pl - " prefix. Sample views are provided for common roles in retail organizations, such as Buyers and GMMs.

3. Open a new browser window (do not open a browser window by selecting File > New > Window) and log on with the user account to which you just assigned the view.
4. Review the screens and components on this view to familiarize yourself with what you like and what you want to change.
5. If you are the only administrator and you are not concerned about preserving the samples as they are, you can modify them directly. This allows you to use the views as they are without having to assign newly created or copied screens, and to use the screens without having to add newly created or copied components.

If there are other administrators and you want to preserve the samples, make a copy of what you want to change first. To make a copy of a view, screen, or component, click the Copy link on the corresponding View, Screen, or Component Administration screen.

6. Modify and save each view, screen, or component as necessary.

Explanations of each parameter are in the online help. (Click the help button in the title bar of the screen.)

7. If you copied components, add them to screens, and if you copied screens, add them to a new or copied view. See the following:
 - ["Adding Components to a Screen"](#) on page A-37
 - ["Adding Screens to a View"](#) on page A-38
8. Test the view by assigning it to one of your test user accounts, opening a new browser instance, and logging on as that user. If you want to update a parameter:
 1. Switch to the browser window where you are logged on as an administrator.
 2. Make the change(s).
 3. Switch back to the test user account browser window.
 4. Click the changed view, screen, or component to see the change.

Note: You must open separate instances of the browser by starting Internet Explorer. Opening a browser window via File > New > Window will not work because then two instances of the browser are sharing one Merchant Desktop session.

9. When you are satisfied with the view, assign it to users as explained in ["Assigning a View to a User"](#) on page A-39.

Explanations of each parameter are in the online help. (Click the help button in the title bar of the screen.)

10. After you assign views to users, see ["Understanding Updates"](#) on page A-33 to understand which updates affect power user accounts. Standard user accounts receive all administrative updates.

Creating and Deploying Views and Their Elements

If you want to start from scratch, here is a comprehensive and sequential list of all of the tasks involved in creating your own components, screens, and views and deploying them to users.

- Create one or more components. See ["Creating a Component"](#) on page A-36

- Create one or more screens. See ["Creating a Screen"](#) on page A-36
- Add one or more components to each screen. See ["Adding Components to a Screen"](#) on page A-37
- Create one or more views. See ["Creating a View"](#) on page A-37
- Add one or more screens to each view. See ["Adding Screens to a View"](#) on page A-38
- Assign each view to one or more users. See ["Assigning a View to a User"](#) on page A-39

All of these procedures assume you are logged on to Merchant Desktop with full administrative privileges.

Creating a Component

A component is a window that can be placed on Merchant Desktop screens. Depending on the type of component you create, you can add a variety of information from sources such as HTML pages, web sites, news feeds, Oracle Retail products, and reports.

To create a component:

1. From the list of screens at the top of the Merchant Desktop, click the Component Administration link.

The Component Administration screen appears.

2. Click the Create Component link.

The Create Component screen appears.

3. Complete the Create Component screen.

4. When the Create Component screen reflects the setting you want, click Save.

The Component Administration screen appears, and the new component appears in alphabetical order in the ID column.

What to do next

Add the component to a screen, as explained in ["Adding Components to a Screen"](#) on page A-37.

Creating a Screen

A screen is a container for components. It consists of a name and a layout.

Depending on the layout, some screens can be assigned a maximum of six components. The one-column, two-column, and three-column open layouts can be assigned as many components as you want.

To create a screen:

1. From the list of screens at the top of the Merchant Desktop, click the Screen Administration link.

The Screen Administration screen appears.

2. Click the Create Screen link.

The Create Screen screen appears.

3. Complete the ["Create Screen"](#) on page A-41, and click Save.

The Screen Administration screen appears, and the new screen appears in alphabetical order in the ID column. You (and end users) cannot view it, however, until you add the screen to a view and then assign the view to a user.

What to Do Next

Add components to the screen, as explained in ["Adding Components to a Screen"](#) on page A-37.

Adding Components to a Screen

Screens are the containers for components. Each screen consists of a layout and a type that determine how many components and what type of components you can add to the screen.

To add components to a screen:

1. From the list of screens at the top of the Merchant Desktop, click the Screen Administration link.

The Screen Administration screen appears.

2. In the ID column, click the name of a screen.

The Edit Screen screen appears.

3. From the list of available components, click and drag a component to the screen layout.

The component ID is highlighted in green (meaning "go") when you select it, and the target cell outline turns red (meaning "stop" or "drop") when you can release the mouse to place the component.

- You can move the components to any cell in the layout.
- You can add the same component more than one time.
- You can remove a component from the layout by clicking the X in the upper-right corner.
- You can leave a cell blank.
- You can reposition components by clicking and dragging the component to another cell. If the cell is occupied, that component automatically moves to the next available space, or it switches places with the moved component.

Note: You can add unlimited components only to the one-column, two-column, and three-column layouts. For the other layouts, the maximum number of components is six, and you can leave a layout cell blank.

4. When the Edit Screen screen appears with the selections you want, click the Save button.

What to Do Next

Add the screen to a view, as explained in ["Adding Screens to a View"](#) on page A-38

Creating a View

A view is a list of one or more screens that users are allowed to access. When users log on to Merchant Desktop, the view appears immediately after a successful login. For each view, you must select a skin (color scheme) and a home screen (the screen that will have the focus when users first log on).

Each user can be assigned only one view.

To create a view:

1. From the list of screens at the top of the Merchant Desktop, click the View Administration link.
The View Administration screen appears.
2. Click the Create View link.
The Create View appears.
3. Complete the Create View with the internal ID and description.
The user sees only the description. The ID and description appear on administration screens to help you distinguish between the different views that you create.
4. When the Create View screen reflects the setting you want, click Save.
The View Administration screen appears, and the new view appears in alphabetical order in the ID column. Before you and users can access it, you must assign screens to the view and then assign the view to users.

What to Do Next

Add screens to the view, as explained in ["Adding Screens to a View"](#) on page A-38.

Adding Screens to a View

You can add as many screens as you want to a view. If you plan to add several screens to a view, consider making the screen names as short as possible. Each screen name appears on the tabs in the view, so making the screen names short will help to minimize the amount of horizontal scrolling users must do to see all of the screen tabs in the view.

To assign a screen to a view:

1. Select View Administration.
The View Administration screen appears.
2. Click the name of the view to which you want to assign the screen you just created.
The Edit View screen appears.
3. From the Available Screens list, select the screen you just created.
To select multiple screens, click a screen name, press and hold the Ctrl key, and click the names of the other screens you want to add.
4. When you have selected the screen(s) you want to assign to this view, click the Add button.
The screen name(s) move to the Screens In View list.
5. When the Screens In View list reflect all of the screens you want to add, click the Save button.
The View Administration screen appears.

What to Do Next

Assign the view to a user, as explained in ["Assigning a View to a User"](#) on page A-39.

Assigning a View to a User

You can assign only one view to a user name. If a UserView1 is assigned to a user name and you then assign UserView2 to that same user name, UserView2 will become the default Merchant Desktop the next time that user logs on.

To assign a view to a user:

1. If the View Administration screen is not displayed, select it from the list of screens.
The View Administration screen appears.
2. For the view to which you just assigned the new screen, click the Assign link.
The Assign View appears.
3. From the Available Users list, select one or more user names to assign to this screen list.

An * (asterisk) preceding the user name indicates that user is already assigned a view. The assigned view appears in (parentheses) after the user name.

Important: If a user is already assigned to a view, assigning another view overrides the existing view. The next time that user logs on, the new view appears on the Merchant Desktop.

To select multiple users, click a name, press and hold the Ctrl key, and click the names of the other users you want to add.

4. When you have selected the user(s) to whom you want to assign the view, click the Assign button.
The user name(s) move to the Users Assigned This View list.
5. Make sure you have selected the correct user names, and when the Assign View screen appears with the selections you want, click the Save button.

The default screen of the Merchant Desktop appears.

What to Do Next

There is nothing else you need to do with the view or its elements. The view will appear to each of the assigned users the next time they log on.

Screen Administration

The Screen Administration screen lists sample screens supplied with Merchant Desktop (denoted by the "pl - " prefix) and those created by you and other administrators. Screens created by other administrators appear only when those administrators have selected the Allow All Administrators To Access check box for one or more screens.

All of the screens on this list can be assigned to one or more views. Use the Screen Administration screen as a starting place to do the following:

- Create a screen
- Create a screen
- Copy a screen
- Delete a screen
- Edit a screen
- Show or hide screens to/from users' and other administrators' lists of screens

Create Screen link:

Click this link to open Create Screen, which will let you create a screen that you can add to a view

Allow All Users To Add check box:

This check box determines whether or not the screen appears on the View Personalization screen in the list of screens that users can add to their view.

- Select this check box to hide this screen name from users.
- Clear this check box to allow this screen name to appear to users.

Allow All Administrators To Access check box:

This check box determines whether or not the screen ID will appear on the Screen Administration screen of all other administrators.

- Select this check box to hide this screen ID from other administrators. This effectively secures and preserves the screen you created - no other administrators can change it.
- Select this check box to show this screen ID to other administrators. Use this option when you want to share a screen with other administrators. This means that the screen is available for copying, editing, or deleting by other administrators, and that when one administrator makes a change, all administrators receive that change. If multiple administrators are editing the same screen at the same time, only the last-saved version is preserved.

Note: If you want to preserve your screen but still make it available to other administrators, make a copy of it first and then select the Allow All Administrators To Access check box.

ID column:

Each screen name in the ID column is a link to the Edit Screen where you can modify all of the screen settings except for layout (e.g., one, two, or three columns, etc.). Currently, you cannot modify the layout. If you want a different layout for a screen, you must recreate it.

Screens with the "pl - " prefix are samples supplied with Merchant Desktop. To preserve these screens for other administrators, copy them before modifying them.

Description column:

This column displays the descriptive text you entered on the Create Screen or Edit Screen screens. To change the description, click the screen name and enter a new description on the Edit Screen.

Copy link:

Click this link to open the Copy Screen, where you can copy all of a screen's settings (including layout and components) to a new screen.

Delete link:

Click this link to remove this screen from the Merchant Desktop system.

Caution:

There is no undo function. If you delete a screen and later want to use it, you must recreate it. Deleting a screen has the following effects:

- Removes the screen ID from Screen Administration for you and all administrators.
- Removes the screen from any view to which it is currently assigned. The next time users access this view, the screen tab will no longer be available.

Create Screen

Use this screen to enter the parameters that will determine the default layout and components.

Select Screen Type:

Select one of the following screen types:

Table A–4

Screen type	Description
Standard	The Standard screen is the most flexible of all of the screen types. For each standard screen, you can select a variety of pre-defined screen layouts, and you can add all of the components.
Reporting	<p>The Reporting screen provides access to the MicroStrategy Web Universal application and to the reports and graphs that have been supplied with Merchant Desktop.</p> <p>You cannot customize the Reporting screen except for its display name and description.</p>

ID:

Required. The ID appears on Screen Administration, in Available Screens / Screens In View list boxes (for both administrators and users), and on the Screen Personalization screen (for users).

- The ID can be a maximum of 30 characters. If you attempt to type more than 30 characters, the characters do not appear in the text box.
- If you leave the Display Name text box blank, the ID automatically becomes the display name. You can change this later.
- The ID must be unique in the entire Merchant Desktop system. Therefore, if another administrator created a screen with the ID of Regional Graphs, you would not be able to create a screen with the same ID.
- Letter case (uppercase and lowercase) is not considered unique. Therefore, Regional Graphs, regional graphs, and REGIONAL GRAPHS are all considered to be the same ID.

Display Name:

Required. The display name appears on Screen Administration (for administrators) and on the screen tab in views (for users).

- The display name can be a maximum of 255 characters, although it is good practice to use shorter names to prevent horizontal scrolling. If you attempt to type more than 255 characters, the characters do not appear in the text box.
- If you leave the Display Name text box blank, the ID automatically becomes the display name. You can change this later.

Description:

Optional. Use it to type any information that would help you to identify this screen in a list.

- The description can be a maximum of 255 characters. If you attempt to type more than 255 characters, the characters do not appear in the text box.

Note:

Users see the display name on each screen tab and the ID, display name, and description on the Screen Personalization screen. The ID, display name, and description appear on administration screens to help you distinguish between the different screens that you create.

Select Layout:

Select one of the following layouts, which determines the number of components and where you can place them on screens. Note that there are two types of layouts in the list:

- Fixed layouts - These layouts can contain from one to a set number of components. Their names begin with "Layout", and the maximum number of components is the highest number in the thumbnail representations (see the table below).
- Open layouts - These layouts can contain an unlimited number of components. They are named One Column, Two Column, and Three Column.

For example, Layout 8, which has three columns, can hold only three components (i.e., one row of three components). The Three Column layout, on the other hand, has three columns but can hold an unlimited number of components (i.e., there can be several rows of components).

Important: You cannot switch to a different layout after a screen is created. Therefore, make sure you know which layout you want before you create the screen. Otherwise, if you do want to switch to a different layout, you must create a new screen.

Table A–5

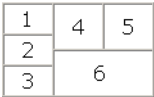
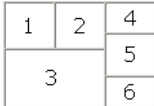
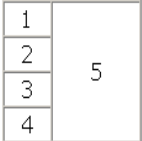
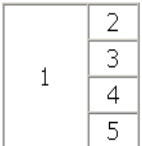
Layout name	Representation	Type
Layout 1		Fixed layout
Layout 1 Inverted		Fixed layout
Layout 2		Fixed layout Note: Cell 1 is 16% high, Cell 2 is 17% high, and Cells 3 and 4 are 33% high.
Layout 2 Inverted		Fixed layout Note: Cell 2 is 16% high, Cell 3 is 17% high, and Cells 4 and 5 are 33% high.

Table A-5 (Cont.)

Layout name	Representation	Type							
Layout 3	<table><tr><td>1</td><td>2</td><td>3</td></tr><tr><td colspan="3">4</td></tr></table>	1	2	3	4			Fixed layout	
1	2	3							
4									
Layout 3 Inverted	<table><tr><td colspan="3">1</td></tr><tr><td>2</td><td>3</td><td>4</td></tr></table>	1			2	3	4	Fixed layout	
1									
2	3	4							
Layout 4	<table><tr><td>1</td><td colspan="2">4</td></tr><tr><td>2</td><td rowspan="2">5</td><td rowspan="2">6</td></tr><tr><td>3</td></tr></table>	1	4		2	5	6	3	Fixed layout
1	4								
2	5	6							
3									
Layout 4 Inverted	<table><tr><td colspan="2">1</td><td>4</td></tr><tr><td rowspan="2">2</td><td rowspan="2">3</td><td>5</td></tr><tr><td>6</td></tr></table>	1		4	2	3	5	6	Fixed layout
1		4							
2	3	5							
		6							
Layout 5	<table><tr><td>1</td><td rowspan="2">4</td></tr><tr><td>2</td></tr><tr><td>3</td><td>5</td></tr></table>	1	4	2	3	5	Fixed layout		
1	4								
2									
3	5								
Layout 5 Inverted	<table><tr><td>1</td><td>3</td></tr><tr><td rowspan="2">2</td><td>4</td></tr><tr><td>5</td></tr></table>	1	3	2	4	5	Fixed layout		
1	3								
2	4								
	5								
Layout 6	<table><tr><td>1</td><td>2</td></tr><tr><td>3</td><td>4</td></tr></table>	1	2	3	4	Fixed layout			
1	2								
3	4								
Layout 7	<table><tr><td>1</td></tr><tr><td>2</td></tr></table>	1	2	Fixed layout					
1									
2									
Layout 7 Inverted	<table><tr><td>1</td><td>2</td></tr></table>	1	2	Fixed layout					
1	2								
Layout 8	<table><tr><td>1</td><td>2</td><td>3</td></tr></table>	1	2	3	Fixed layout				
1	2	3							
Layout 8 Inverted	<table><tr><td>1</td></tr><tr><td>2</td></tr><tr><td>3</td></tr></table>	1	2	3	Fixed layout				
1									
2									
3									
Layout 9	<table><tr><td>1</td></tr></table>	1	Fixed layout						
1									

Table A-5 (Cont.)

Layout name	Representation	Type									
One Column	<table><tr><td>1</td></tr><tr><td>2</td></tr><tr><td>...</td></tr></table>	1	2	...	<p>Open layout</p> <p>You can add as many rows as necessary, limited only by the memory available on your computer.</p>						
1											
2											
...											
Two Column	<table><tr><td>1</td><td>2</td></tr><tr><td>3</td><td>4</td></tr><tr><td>...</td><td>...</td></tr></table>	1	2	3	4	<p>Open layout</p> <p>You can add as many rows as necessary, limited only by the memory available on your computer.</p>			
1	2										
3	4										
...	...										
Three Column	<table><tr><td>1</td><td>2</td><td>3</td></tr><tr><td>4</td><td>5</td><td>6</td></tr><tr><td>...</td><td>...</td><td>...</td></tr></table>	1	2	3	4	5	6	<p>Open layout</p> <p>You can add as many rows as necessary, limited only by the memory available on your computer.</p>
1	2	3									
4	5	6									
...									

Allow Personalization check box:

As with all administration screens, this entry determines whether or not users can modify the corresponding value.

- Select this check box if you want to display this entry on the user personalization screens so that users can change it. For example, if you select the Allow Personalization check box for the Display Name, the Display Name text box appears on user personalization screens and users can change it to whatever they want.

If you later make changes to this entry, the end user screen is updated only if the user has selected to display the default values set by you.

- Clear this check box if you want to hide this entry on the user personalization screens so that users cannot change it. For example, if you clear the Allow Personalization check box for the Description, the Description text box does not even appear on user personalization screens.

Copy Screen

Use this screen to copy and rename an existing screen. This allows you to create a new screen by using all of the settings from another screen. After you create a screen by copying, you can then modify any of the settings except for the layout type.

ID:

Required. The ID appears on Screen Administration, in Available Screens / Screens In View list boxes (for both administrators and users), and on the Screen Personalization screen (for users)

- The ID can be a maximum of 30 characters. If you attempt to type more than 30 characters, the characters do not appear in the text box.
- The ID must be unique in the entire Merchant Desktop system. Therefore, if another administrator created a screen with the ID of Regional Graphs, you would not be able to create a screen with the same ID.

- Letter case (uppercase and lowercase) is not considered unique. Therefore, Regional Graphs, regional graphs, and REGIONAL GRAPHS are all considered to be the same ID.

Screen IDs Already in Use By You:

This list box displays the IDs of screens you created previously, and it is provided for your convenience so that you don't duplicate one of your own screen IDs. Screen IDs created by other administrators, however, do not appear in this list. Therefore, it is possible to duplicate another administrator's screen ID. When this occurs, an error message appears.

Edit Screen

Use this screen to modify settings for existing screens. The only aspect of a screen that you cannot change is the layout. If you want a different layout, you must create a new screen.

ID:

Required. The ID appears on Screen Administration, in Available Screens / Screens In View list boxes (for both administrators and users), and on the Screen Personalization screen (for users).

- The ID can be a maximum of 30 characters. If you attempt to type more than 30 characters, the characters do not appear in the text box.
- The ID can be a maximum of 30 characters. If you attempt to type more than 30 characters, the characters do not appear in the text box.
- If you leave the Display Name text box blank, the ID automatically becomes the display name. You can change this later.
- The ID must be unique in the entire Merchant Desktop system. Therefore, if another administrator created a screen with the ID of Regional Graphs, you would not be able to create a screen with the same ID.
- Letter case (uppercase and lowercase) is not considered unique. Therefore, Regional Graphs, regional graphs, and REGIONAL GRAPHS are all considered to be the same ID.

Display Name:

Required. This text appears on the tab of each screen in the view.

- The display name can be a maximum of 255 characters, although it is good practice to use shorter names to prevent horizontal scrolling. If you attempt to type more than 255 characters, the characters do not appear in the text box.
- If you leave the Display Name text box blank, the ID automatically becomes the display name. You can change this later.

Description:

Optional. Type any information that would help you to identify this screen in a list.

- The description can be a maximum of 255 characters. If you attempt to type more than 255 characters, the characters do not appear in the text box.

Note: Users see the display name on each screen tab and the ID, display name, and description on the Screen Personalization screen. The ID, display name, and

description appear on administration screens to help you distinguish between the different screens that you create.

Allow Personalization check box:

As with all administration screens, this entry determines whether or not users can modify the corresponding value.

- Select this check box if you want to display this entry on the user personalization screens so that users can change it. For example, if you select the Allow Personalization check box for the Display Name, the Display Name text box appears on user personalization screens and users can change it to whatever they want.

If you later make changes to this entry, the end user screen is updated only if the user has selected to accept updates from the administrator.

- Clear this check box if you want to hide this entry on the user personalization screens so that users cannot change it. For example, if you clear the Allow Personalization check box for the Description, the Description text box does not even appear on user personalization screens.

Available Components list box and screen layout:

Lists all of the components that can be added to the screen in this format - ID (Display Name). When you click a component name, the name is highlighted in green, indicating "go" to the screen layout.

Note: The Available Components list box and screen layout are not applicable to all screen types (e.g., Top/Bottom) and therefore may not appear.

Table A-6

To	Do this
Add components	As you drag the component from the available component list across the layout, a red outline, indicating "stop", indicates where you can place ("drop") that component. When you place or drop the component, the displaced component moves down or across to the next spot.
Change the number of components	<p>Note: You can add unlimited components only to the one-column, two-column, and three-column layouts. For the other layouts, the maximum number of components is indicated by the number of cells, and you can leave a layout cell blank.</p> <ul style="list-style-type: none"> ■ To remove a component, click the X in the upper-right corner of that component's cell ■ To add a component, click it in the list box on the left and drag it to its target location
Change the type of components	<p>Note: Some screens have restrictions on the types of components you can add to them. For example, you can add only the Filter component, Filtered Report component, and Filtered Graph component to the Performance screen.</p> <p>Select the new component type from the list box and drag it to its target location.</p>

Table A-6 (Cont.)

To	Do this
Edit the component	<p>Click the pencil button and complete the resulting component screen. Note the following:</p> <ul style="list-style-type: none"> ■ The change(s) to the component is saved when you click the Save button on the component screen. Thus, the change is made even if you click Cancel on the Edit Screen. ■ Clicking the pencil button in the screen layout is the same as clicking the component ID on the Component Administration screen. Thus, you are changing your version of the component, which updates that component on all of your screen layouts.

Delete Screen

Use this screen to verify that you actually want to delete the specified screen.

Caution: There is no undo function. If you delete a screen and later want to use it, you must recreate it. In addition, deleting a screen removes it from the entire Merchant Desktop system. This means that that screen is deleted from all administrators as well as users.

Before you delete a screen, review the list of users whose views currently use the screen.

- Click Yes to do the following:

Remove the screen ID from the Screen Administration screen for you and all administrators

Remove the screen from any view to which it is currently assigned. When the impacted users next log on, their assigned view will appear minus this deleted screen.

- Click No to retain the screen.

View Administration

The View Administration screen lists sample views supplied with Merchant Desktop (denoted by the "pl - " prefix) and those created by you and other administrators.

Views created by other administrators appear only when those administrators have selected the Allow All Administrators To Access check box for one or more views.

All of the views on this list can be assigned to one or more users. Use the View Administration screen as a starting place to do the following:

- Create a new view
- Edit a view
- Copy a view
- Delete a view
- Assign a view to a user
- Show or hide a view to/from other Merchant Desktop administrator view lists

Create View link:

Click this link to display the Create View Administration screen.

Allow All Administrators To Access check box:

This check box determines whether or not the view will appear on the View Administration screen of all other administrators.

- Select this check box to hide this view name from other administrators. This effectively secures and preserves the view you created - no other administrators can change it.
- Select this check box to show this view name to other administrators. Use this option when you want to share a view with other administrators. This means that the view is available for copying, editing, or deleting by other administrators, and that when one administrator makes a change, all administrators receive that change. If multiple administrators are editing the same view at the same time, only the last-saved version is preserved.

Note: If you want to preserve your view but still make it available to other administrators, make a copy of it first and then select the Allow All Administrators To Access check box.

ID column:

Each view ID is a link to the Edit View screen where you can modify which parameters users can edit, which screens appear in the view, and which skin (color scheme) will be applied to the view.

Views with the "pl - " prefix are samples supplied with Merchant Desktop. To preserve these views for other administrators, copy them before modifying them.

Description column:

This column displays the descriptive text you entered on the Create View or Edit View screens. To change the description, click the view name and enter a new description on the Edit View screen.

Copy link:

Click this link to open the Copy View screen, where you can copy all of a view's settings to a new ID.

Delete link:

Click this link to remove this view from the Merchant Desktop system.

Caution: There is no undo function. If you delete a view and later want to use it, you must recreate it. Deleting a view has the following effects:

- Removes the view ID from the View Administration screen for you and all administrators.
- Removes the view from all user accounts to which it is currently assigned. The next time affected users log on to Merchant Desktop, the unassigned view message will appear.

Assign link:

Click this link to display the Assign View screen where you can assign the selected view to, or unassign a view from, one or more users.

Assign View

Use the Assign View screen to assign views to one or more users. Users cannot view any screens you create until you assign the corresponding view to their user name.

View Being Assigned:

This is the internal name of the view that you are assigning. You cannot change the view name on this screen.

Available Users:

These are the users defined to the Merchant Desktop and to whom you can assign the view.

An * (asterisk) preceding the user name indicates that that user is already assigned a view. The assigned view appears in (parentheses) after the user name.

Important: Users can be assigned only one view at a time. If you assign this view to users with existing assignments, this view will overwrite that view, including any personalizations users have made.

Users Assigned This View:

These users have already been assigned this view.

Create View

Use the Create View screen to create the list of screens that users are allowed to access.

ID:

Required. This ID is for internal use only. It will appear on the View Administration screen, but it will not be visible to end users.

- The ID can be a maximum of 30 characters. If you attempt to type more than 30 characters, the characters do not appear in the text box.
- The ID must be unique in the entire Merchant Desktop system. Therefore, if another administrator created a view with an ID of Girls Division Buyers, you would not be able to create a screen with the same ID.
- Letter case (uppercase and lowercase) is not considered unique. Therefore, Girls Division Buyers, girls division buyers, and GIRLS DIVISION BUYERS are all considered to be the same ID.

Description:

Optional. Type any information that would help you to identify this screen in a list.

- The description can be a maximum of 255 characters. If you attempt to type more than 255 characters, the characters do not appear in the text box.

Note: Users see the description only on the View Personalization screen.

Skin:

Select a skin (color scheme) to apply to the entire view, which includes the tabs, screens, and components. A skin is similar to a Windows "scheme" in that it determines the colors of the tabs and title bars.

Each skin name includes the predominant color.

Allow Personalization check box:

As with all administration screens, this entry determines whether or not users can modify the corresponding value.

- Select this check box if you want to display this entry on the user personalization screens so that users can change it. For example, if you select the User Editable

check box for the Display Name, the Display Name text box appears on user personalization screens and users can change it to whatever they want.

If you later make changes to this entry, the end user screen is updated only if the user has selected to accept updates from the administrator.

- Clear this check box if you want to hide this entry on the user personalization screens so that users cannot change it. For example, if you clear the User Editable check box for the Description, the Description text box does not even appear on user personalization screens.

Clear this check box if you want to hide this entry on the user personalization screens so that users cannot change it. For example, if you clear the User Editable check box for the Description, the Description text box does not even appear on user personalization screens.

Copy View

Use the Copy View screen to copy and rename an existing view. This allows you to use all of the settings you previously created.

ID:

Required. This ID is for internal use only. It appears on the View Administration screen, but it is not visible to end users.

- The ID can be a maximum of 30 characters. If you attempt to type more than 30 characters, the characters do not appear in the text box.
- The ID must be unique in the entire Merchant Desktop system. Therefore, if another administrator created a view with an ID of Girls Division Buyers, you would not be able to create a view with that same ID.
- Letter case (uppercase and lowercase) is not considered unique. Therefore, Girls Division Buyers, girls division buyers, and GIRLS DIVISION BUYERS are all considered to be the same ID.

View IDs Already In Use By You:

This list box displays the IDs of views you created previously, and it is provided for your convenience so that you don't duplicate one of your own view IDs. View IDs created by other administrators, however, do not appear in this list. Therefore, it is possible to duplicate another administrator's view ID. When this occurs, an error message appears.

Edit View

Use the Edit View screen to create the list of screens that users are allowed to access.

ID:

Required. This ID is for internal use only. It appears on the View Administration screen, but it is not visible to end users.

- The ID can be a maximum of 30 characters. If you attempt to type more than 30 characters, the characters do not appear in the text box.
- The ID must be unique in the entire Merchant Desktop system. Therefore, if another administrator created a view with an ID of Girls Division Buyers, you would not be able to create a screen with the same ID.

- Letter case (uppercase and lowercase) is not considered unique. Therefore, Girls Division Buyers, girls division buyers, and GIRLS DIVISION BUYERS are all considered to be the same ID.

Description:

Optional. Type any information that would help you to identify this screen in a list.

- The description can be a maximum of 255 characters. If you attempt to type more than 255 characters, the characters do not appear in the text box.

Note: Users see the description only on the View Personalization screen.

Skin:

Select a skin to apply to the entire view, which includes the tabs, screens, and components. A skin is similar to a Windows "scheme" in that it determines the colors of the tabs and title bars. Each skin name includes the predominant color.

Allow Personalization check box:

As with all administration screens, this entry determines whether or not users can modify the corresponding value.

- Select this check box if you want to display this entry on the user personalization screens so that users can change it. For example, if you select the User Editable check box for the Display Name, the Display Name text box appears on user personalization screens and users can change it to whatever they want.

If you later make changes to this entry, the end user screen is updated only if the user has selected to accept updates from the administrator.

- Clear this check box if you want to hide this entry on the user personalization screens so that users cannot change it. For example, if you clear the User Editable check box for the Description, the Description text box does not even appear on user personalization screens.

Available Screens list:

Lists all of the screens that can be added to the view in this format - ID (Display Name). To add a screen, click the screen name and then click the Add button. You can add the same screen multiple times.

Screens in View list:

These are the screens that will appear to end users. The top screen in the list appears first (left most) in the view, and the bottom screen in the list appears last (right most) in the view.

To change the order of the screens, click a screen name and then click the Top, Up, Down, or Bottom buttons until the screen name is in the target position.

Delete View

Use this screen to verify that you actually want to delete the specified view.

Caution: There is no undo function. If you delete a view and later want to use it, you must recreate it. In addition, deleting a view removes it from the entire Merchant Desktop system. This means that that view is deleted from all administrators as well as users.

Before you delete a view, review the number and list of users currently assigned to it.

- Click Yes to do the following:
 - Remove the view ID from the View Administration screen for you and all other administrators.
 - Remove the view from the users accounts in the Impacted Users list. Unless you assign another view to these users, the next time they log on, the Unassigned User message will appear.
- Click No to retain the view.

Note: If you simply want to remove a view from one or more users but otherwise keep it to assign later, use the Unassign button on the Assign View.

Component Administration

The Component Administration screen lists sample components supplied with Merchant Desktop (denoted by the "pl - " prefix) and those created by you and other administrators. Components created by other administrators appear only when those administrators have selected the Allow All Administrators To Access check box for one or more components.

All of the components on this list can be assigned to one or more screens.

Use the Component Administration screen as a starting place to do the following:

- Create a component
- Copy a component
- Delete a component
- Edit a component
- Show or hide components to/from users' and other administrators' lists of component

Create Component link:

Click this link to open the Create Component screen, which will let you create a new component.

Allow All Users To Add check box:

This check box determines whether or not the component appears on the Screen Personalization screen in the list of components that users can add to their screen.

- Select this check box to hide this component name from users.
- Clear this check box to allow this component name to appear to users.

Allow All Administrators To Access check box:

This check box determines whether or not the component ID will appear on the Component Administration screen of all other administrators.

- Select this check box to hide this component ID from other administrators. This effectively secures and preserves the component you created - no other administrators can change it.
- Select this check box to show this component ID to other administrators. Use this option when you want to share a component with other administrators. This means that the component is available for copying, editing, or deleting by other administrators, and that when one administrator makes a change, all

administrators receive that change. If multiple administrators are editing the same component at the same time, only the last-saved version is preserved.

Note: If you want to preserve your component but still make it available to other administrators, make a copy of it first and then select the Allow All Administrators To Access check box.

ID column:

Each component ID is a link to the Edit Component screen where you can modify all of the component settings.

Components with the "pl - " prefix are samples supplied with Merchant Desktop. To preserve these components for other administrators, copy them before modifying them.

Description column:

This column displays the descriptive text you entered on the Create Component or Edit Component screens. To change the description, click the component name and enter a new description on the Edit Component screen.

Copy link:

Click this link to open the Copy Component screen, where you can copy all of a component's settings to a new component.

Delete link:

Click this link to remove this component from the Merchant Desktop system.

Caution: There is no undo function. If you delete a component and later want to use it, you must recreate it. Deleting a component has the following effects:

- Removes the component ID from the Component Administration screen for you and all administrators.
- Removes the component from any screen to which it is currently assigned. The next time users access this screen, the component will no longer appear. Instead, a blank appears in the cell formerly occupied by that component.

Create Component

Use this screen to enter the parameters that will determine the type of component and its default window parameters such as title bar, padding, and window size.

ID:

Required. The ID appears on the Component Administration screen, in the Available Components list boxes (for both administrators and users), on the screen layouts, and on component edit screens (for both administrators and users).

- The ID can be a maximum of 30 characters. If you attempt to type more than 30 characters, the characters do not appear in the text box.
- The ID must be unique in the entire Merchant Desktop system. Therefore, if another administrator created a component with the ID of Web Sites for Buyers, you would not be able to create a screen with the same ID.
- Letter case (uppercase and lowercase) is not considered unique. Therefore, Web Sites for Buyers, web sites for buyers, and WEB SITES FOR BUYERS are all considered to be the same ID.

Height:

Height applies only to component windows in the 1-, 2-, and 3-column layouts. If the component window is in a fixed layout (such as Layout 1, Layout 1 Inverted, etc.), the height of the component window is set in the screen layout and you cannot change it. You can set the height in pixels or percent, as follows:

- **Pixels** - In general, a pixel is one tiny square of an image on your monitor, and the exact size of the pixel depends on the resolution of your monitor. Because of this, you may need to experiment with the number of pixels you enter. Enter pixels in whole numbers.
- **Percent** - Type the percentage of the screen that you want the component window to use. Enter the percents in whole numbers.

Title Bar:

Select **Show** to display the title bar and **Hide** to show only the border of the component window with no title bar or **Edit**, **help**, **minimize**, or **maximize** buttons.

Select Component Type list box: Select one of the following component types.

Table A-8

Component	Description
HTML	Displays HTML or any web site within the component window
HTTP Links	Displays links to any web site or HTML page. The web site or HTML appears in a separate browser window
Newsfeed	Displays RSS (Rich Site Summary or Really Simple Syndication) feeds.
Graph	Displays a single graph or chart. Several graphs are supplied with Merchant Desktop. For a list of the available graphs, see "Graph Component" on page A-60.
Report	Displays a single report. You can select any of the reports supplied with Merchant desktop (see "Reports Supplied by Merchant Desktop" on page 11-3)

Allow Personalization check box:

As with all administration screens, this entry determines whether or not users can modify the corresponding value.

- Select this check box if you want to display this entry on the user personalization screens so that users can change it. For example, if you select the Allow Personalization check box for the Display Name, the Display Name text box appears on user personalization screens and users can change it to whatever they want.

If you later make changes to this entry, the end user screen is updated only if the user has selected to accept updates from the administrator.

- Clear this check box if you want to hide this entry on the user personalization screens so that users cannot change it. For example, if you clear the Allow Personalization check box for the Description, the Description text box does not even appear on user personalization screens.

Copy Component

Use this screen to copy and rename an existing component. This allows you to create a new component by using all of the settings from another component. After you create a component by copying, you can then modify any of the settings.

ID:

Required. This is for internal use only. It will appear in the list of components you can modify, but it will not be visible to end users.

- The ID can be a maximum of 30 characters. If you attempt to type more than 30 characters, the characters do not appear in the text box.
- The ID must be unique in the entire Merchant Desktop system. Therefore, if another administrator created a component with the ID of Web Sites for Buyers, you would not be able to create a screen with the same ID.
- Letter case (uppercase and lowercase) is not considered unique. Therefore, Web Sites for Buyers, web sites for buyers, and WEB SITES FOR BUYERS are all considered to be the same ID.

Component IDs Already In Use By You:

This list box displays the IDs of components you created previously, and it is provided for your convenience so that you don't duplicate one of your own component IDs. Component IDs created by other administrators, however, do not appear in this list. Therefore, it is possible to duplicate another administrator's component ID. When this occurs, an error message appears.

Delete Component

Use this screen to verify that you actually want to delete the specified component.

Caution: There is no undo function. If you delete a component and later want to use it, you must recreate it. In addition, deleting a component removes it from the entire Merchant Desktop system. This means that that component is deleted from all administrators as well as users.

Before you delete a component, review the list of users whose screens currently use the component.

- Click Yes to do the following:
 - Remove the component ID from the Component Administration screen for you and all administrators.
 - Remove the component from any screen to which it is currently assigned. The next time users access this screen, the component will no longer appear. Instead, a blank appears in the cell formerly occupied by that component.
- Click No to retain the component.

Unassigned View

This appears to be a USER screen, not an ADMIN screen. Find out how admins update this message and then, if appropriate, move this topic to the User Guide as a Help Only conditionalize text.

Use this screen to customize the title and message that you want to appear to users who have not been assigned a view. A user's assigned view determines what appears

immediately after they log on to Merchant Desktop. If they are not assigned a view yet, this component appears with the following default message:

Either the View you have been assigned is empty or you are not currently assigned a view. Please contact your administrator for assistance.

Only an administrator can assign a view to you. A view consists of a row of tabs. Each tab provides access to a screen, each of which contains one or more components. The individual components contain content such as links to news feeds, web sites, and a variety of reports and graphs.

HTML Component

Source: Enter the path and file name of an HTML page or web site that you want to display in this component. If you want to display the HTML page or web site in a separate browser window, use the HTTP links component. See "[HTTP Links Component](#)" on page A-57

HTTP Links Component

Show Description:

This is the descriptive text that appears beneath each actual HTTP link. This parameter applies to all of the HTTP links in this component.

- Select On to display text beneath all of the HTTP links.
- Select Off to hide the text beneath all of the HTTP links.

Tool Tip:

This is text that appears in a yellow box when you hover (hold the mouse pointer over) the link. The default hover text is the URL you enter for Link. This parameter applies to all of the HTTP links in this component.

- Select On to display the hover text for all of the HTTP links.
- Select Off to hide (not display) the hover text for all of the HTTP links.

Show Image:

This is an optional graphic that appears to the left of the link name. This parameter applies to all of the HTTP links in this component.

- Select On to display the image you enter for Link Image (explained below in "[Adding and Removing Links](#)".). When you select On, you must supply a graphic image for each link you create. Otherwise, a missing graphic image appears.
- Select Off to hide the image, if you have entered one, or, if you have omitted one, to hide the missing graphic image.

Allow Add / Remove Links:

Use this parameter to determine whether or not users can remove and/or add additional links to the links you supply. Users can still change the links unless you also select the Allow Personalization check boxes for each link.

- Select On to show the Add Link button and the remove button that users can click to remove (delete) links.
- Select Off to hide the Add Link button and the Remove button that users can click to remove (delete) links.

Adding and Removing Links

You can add as many links as you want.

- To remove a link from this component, click the Remove button in the upper right of the information box.

Link		<input type="button" value="X"/>
Link:	<input type="text" value="http://www.profitlogic.com"/>	<input type="checkbox"/>
Link Name:	<input type="text" value="ProfitLogic corporate web site"/>	<input type="checkbox"/>
Link Description:	<input type="text" value="Current product information and retail news"/>	<input type="checkbox"/>
Link Image:	<input type="text" value="images/bullet.gif"/>	<input type="checkbox"/>

- To add an additional link to this component, click the Add Link button. A new link information box appears with the following fields:

Link:

Enter the destination URL exactly as you would if you were entering it into a browser address box. You must include `http://`.

Link Name:

Enter the text that will become the link to the destination URL. For example, if you add a URL to `http://www.nrf.com`, you might type the following for the link text:

The National Retail Federation

Link Description:

Enter the text that appears directly below the link name (if Show Description is set to On) to further describe the purpose of or information provided by the link. For example, for a link named The National Retail Federation, you might type the following description:

Retail trade association

Link Image:

Enter the path and file name of the image that you want to appear to the left of the link. If you do not want to include images, leave this field blank and select Off for Show Image.

News Feed Component

Source: Type the URL of the site that provides the RSS news feed you want to view. You must create a new component for each RSS news feed. Popular retail news feeds are listed in the following table.

Table A–9

News (RSS) Feed	Description
eMediaWire Retail Industry News	http://www.emediawire.com/ eMediaWire™ is a newswire service of PRWeb™.
PRWeb Retail Industry News	http://www.prweb.com PRWeb™ is a free online press release distribution service. You can distribute press releases here, or you can subscribe to press releases from a variety of categories from in several different languages.

Table A–9 (Cont.)

News (RSS) Feed	Description
Yahoo Business	http://news.yahoo.com Yahoo!® Business offers a variety of RSS feeds in all areas of business.

Display:

This entry determines how you want the news feeds to appear in the component, as follows:

Table A–10

Display type	Description
Static	Shows all of the headlines (and first sentences, if selected) at one time. If the component window is not large enough, a vertical scroll bar appears.
Fading	Shows one headline (and first sentences, if selected) at a time, fading from white (invisible) to gray to full black and then starting again with the next headline, cycling through the number of headlines you selected for links shown.
Horizontal Scrolling	Shows headlines (and first sentences, if selected) starting from the right and moving from right to left within the width of the component window.
Vertical Scrolling	Shows headlines (and first sentences, if selected) starting from the bottom and moving to the top, scrolling within the height of the component window.

Headline Summary:

This is typically the first line of the story, but it can vary by the host news feed web site.

- Select On to display the first sentence of the story. The sentence appears directly below the headline for static, fading, and vertical displays, and it appears directly to the right of the headline for horizontal displays.
- Select Off to hide the first sentence of the story and instead display only the headline.

Speed:

Applies only to fading, vertical, and horizontal displays. The speed value is ignored for the static display.

- The speed value is number of seconds, and it must be a whole number greater than 0.
- A lower number slows the display, and a higher number speeds up the display.
- For fading displays, the number of seconds determines how slowly or quickly the fade cycles from invisible to full black.
- For vertical and horizontal displays, the number of seconds determines how slowly or quickly the scrolling occurs.

Links Shown:

Enter the number of headlines you want to appear in the component. Each headline is a link to the actual story on the site that is hosting the RSS news feed.

Report Component

The currently selected report is highlighted in the reports tree. The structure of the tree matches the directory structure in the MicroStrategy Web Universal reporting application for storing your reports.

- If no report is selected (the tree is collapsed and no report name is highlighted in white), navigate through the tree until you find the report you want to display. Click the report name to select the report.
- To change the report that appears in this component, navigate through the tree and click a different report name.

**Expand To Full Width:**

Select the option that determines how report pages are displayed relative to the space available. Multi-page reports will still provide paging icons.

- Select Yes to cause the report to expand to fill the space available, even if the report is a very short one with a few columns and a few rows.
- Select No to display the report in its intended size. For very small reports, this may result in extra white space on the screen.

Selected Report:

Use this tree as you would use the Windows Explorer tree.

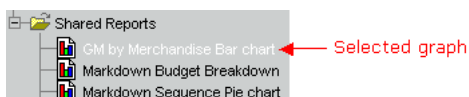
- Click + to expand a folder
- Click - to collapse (close) a folder
- Click the report name to select that report for display on this screen.

Note: You cannot close a folder or any of its parent folders if it contains the selected report.

Graph Component

The currently selected graph is highlighted in the graphs tree. The structure of the tree matches the directory structure in the MicroStrategy Web Universal reporting application for storing your graphs and reports.

- If no graph is selected (the tree is collapsed and no graph name is highlighted in white), navigate through the tree until you find the graph you want to display. Click the graph name to select the graph.
- To change the graph that appears in this component, navigate through the tree and click a different graph name.



Fit To Window:

Select the option that determines how graph pages are displayed relative to the space available. Multi-page graphs will still provide paging icons.

- Select Yes to cause the graph to expand or shrink to fit in the space available, even if the graph is a very small one or a very large one.
- Select No to display the graph in its intended size. For very small graphs, this may result in extra white space on the component window. For very large graphs, this may result in scroll bars on the component window because the graph is larger than the available space.

Selected Graph:

Use this tree as you would use the Windows Explorer tree.

- Click + to expand a folder
- Click - to collapse (close) a folder
- Click the graph or chart name to select it for display on this screen.

Note: You cannot close a folder or any of its parent folders if it contains the selected report.

Personalizing Merchant Desktop

Merchant Desktop is the assortment execution solution that uses advanced analytical insights (optimized history) and actual sales data to support your pre-season (post mortem) assortment planning process. The reports and data presented through this interactive tool may assist you in making strategic, tactical, operational, and in some cases, predictive decisions and recommendations.

When you first access your Merchant Desktop, the system administrator will have created a view and some screens for you. You may personalize those screens and create new ones depending on the access rights assigned to your user account.

To get started with Merchant Desktop, try these topics:

- [About Personalization](#)
- [Personalizing Your View](#)
- [Personalizing Screens](#)
- [Personalizing Components](#)
- [About Views](#)
- [About Screens](#)
- [About Components](#)

About Personalization

When you first log on to the Merchant Desktop, a view with one or more screens and components appears. This view is created for you by the administrator. Depending on the privileges assigned to your user account, you may be able to personalize the following:

- Component position and type
- Screen tab names and order, along with adding new screens

- The color scheme or "skin" of the view, which affects each screen and component
- Different aspects of each component, depending on the component type, such as the title bar of each component or the padding around it.

Personalization Privileges

Pencil buttons denote personalization. When you click a pencil button, the corresponding personalization screen appears.

- If no pencil buttons appear, you have a standard user account, and the administrator has denied all personalizing. In this case, you will find that the view, screens, and/or components are updated with a new look or new information each time the administrator makes updates.
- If the pencil button appears, possibly in some places but not others, you have a power user account, and the administrator has allowed you to personalize only some elements.

It is possible, however, for the administrator to remove the view of one or more screens.

- If some parameters are missing when you compare a personalization screen to the help, the administrator has prohibited the missing parameters from being changed. You may change any of the available parameters.

Personalizing Your View

You must have a power user account to make any changes. If no pencil buttons are available when you log on to Merchant Desktop, you most likely have a standard user account.

Your view is the row of tabs shown below:



As long as the administrator has given you privileges to do so, you can personalize your view as follows:

- Add one or more screens
- Remove one or more screens
- Reorder the screens
- Change the skin (color scheme)

To personalize your view:

1. At the right end of the row of screen tabs, click the pencil button.

If the pencil button is not available, the administrator has prohibited changes to the view. Otherwise, the View Personalization screen appears.

2. Complete the View Personalization screen as follows:

Notes:

- If one of the parameters listed below is missing from the screen, the administrator has prohibited that parameter from being changed.
- If the parameter appears but is grayed out and you can't edit it, clear the Use Default check box. That will allow you to change the parameter, but it will not allow you to receive updates from the administrator for that parameter.

Table A-11

To	Do this
Add a screen	In the Available Screens list, click the screen name and then click the Add button. The screen name moves to the Screens In View list.
Remove a screen	In the Screens In View list, click the screen name and then click the Remove button. The screen name is removed from the list.
Reorder the screens	In the Screens In View list, click a screen name and then click the Top, Up, Down, or Bottom buttons to move the screen name to its target position.
Change the skin	<p>Change skins when you want to adjust the dominant color scheme of your view, screens, and components.</p> <p>You can select skins from those provided by the administrator.</p> <p>From the Skin list box, select the name of a skin. Each skin name includes the predominant color.</p> <p>The color scheme of the skin you selected is applied to all of the screen tabs and all of the component title bars.</p>
Set the home screen	<p>From the Home Screen list box, select the name of the screen that you want to have the focus when you first log on. Setting the default home screen is different from setting screen order.</p> <ul style="list-style-type: none"> ■ Screen order determines the order of the tabs from left to right. ■ Home screen determines which of those tabs is in the foreground when you log on. <p>For example, you could set the first (left most) screen to be the home screen, or you could set the third screen to be the home screen.</p>

3. When the View Personalization screen reflects the changes you want, click the Save button.

The updates are effective immediately.

Personalizing Screens

You must have a power user account to make any changes. If no pencil buttons are available when you log on to Merchant Desktop, you most likely have a standard user account.

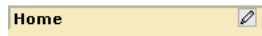
You may personalize screens to the extent permitted by the administrator. Following is a list of the changes you may make:

- Screen name - The text that appears on each screen tab and the corresponding personalization screen. Rename a screen when you want different text to appear on the screen tab.
- Screen layout - The order and position of the components
- Components - The number and type of components that appear on the screen

To personalize a screen:

1. Click the tab of the screen you want to personalize.

The screen appears, and a pencil button appears next to the name of the screen, as in this example:



2. Click the pencil button.
The Personalization screen appears.
3. Complete the Screen Personalization Screen as follows.

Notes:

- If one of the parameters listed below is missing from the screen, the administrator has prohibited that parameter from being changed.
- If the parameter appears but is grayed out and you can't edit it, clear the Use Default check box. That will allow you to change the parameter, but it will not allow you to receive updates from the administrator for that parameter.

Table A-12

To	Do this
Change the screen name	<p>Enter new text in the Display Name text box.</p> <p>The text on the screen tab as well as the title bar of the personalization screen update with this text.</p>
Change the position of components	<p>You can change the order and position of components within the confines of the assigned screen layout type. For example, if the screen is assigned a two-column layout, you cannot change that to a three-column layout.</p> <p>If you need a different layout, such as more columns or a different arrangements of rows and columns, request that from the administrator.</p> <p>Finally, if the layout is a 1-, 2-, or 3-column open layout, you can add as many components as necessary, limited only by the memory available to your browser.</p> <p>In the layout, click the name of the component you want to move and drag it to the target location.</p> <ul style="list-style-type: none"> ■ When you click the name of a component, it is highlighted in green indicating that you can "go" or "drag" the component to a cell in the layout ■ As you drag the component across the layout, a red outline indicates where you can "stop" or "drop" that component. <p>A displaced component moves to the open spot left by the moved component</p>

Table A-12 (Cont.)

To	Do this
Change the number of components	<p>Note: You can add unlimited components only to the one-column, two-column, and three-column layouts. For the other layouts, the maximum number of components is from one to six. You can leave a layout cell blank.</p> <ul style="list-style-type: none"> ■ To remove a component, click the X in the upper-right corner of that component's cell ■ To add a component, click it in the list box on the left and drag it to its target location <p>You can add multiple copies of a component to one screen.</p>
Change the type of components	<p>Note: Some screens have components added to them by default.</p> <p>Select the new component type from the list box and drag it to its target location.</p>
Edit the component	<p>Click the pencil button and complete the resulting component screen.</p> <p>To save the change to the component, you must click Save both on the component screen and on the Screen personalization screen.</p>

4. Click the Save button.

The changes you made are effective immediately.

Personalizing Components

You must have a power user account to make any changes. If no pencil buttons are available when you log on to Merchant Desktop, you most likely have a standard user account.

You may personalize components to the extent permitted by the Desktop administrator. In addition, the features you may personalize depend on the component type. In general, you may change the following:

- Rename the title that appears in the title bar, or simply hide it
- Adjust the spacing between components
- Change the content of a component
- Change the look or behavior of the content

To personalize a component:

1. On the component you want to personalize, click the pencil button.

A screen that corresponds to the component type appears. This screen is titled the same as the component.

2. Complete the screen. The parameters differ depending on the component type:

- HTML Component screen
- HTTP Links Component screen
- News Feed Component screen
- Graph Component screen

- Report Component screen
3. When the screen reflects your choices, click Save. The changes take effect immediately.

About Views

A view is the collection of screens and their components that appear on each user's Merchant Desktop. The administrator creates the views, screens, and components in any order, but it is helpful if you understand how they relate to each other:

- Components are the building blocks of screens, and they contain the actual content. They appear as individual windows on each screen.
- Screens are the building blocks of views, and they serve as containers for components.
- Views are the "packages" that hold the screens (basically, a row of screen tabs). Views are what an administrator assigns to Merchant Desktop users.

About Screens

Screens are the containers for components (each within its own window). Essentially, screens provide layout while component windows provide content. On the Merchant Desktop, screens are identified by the row of tabs that appear near the top of the screen. Each screen consists of the following:

- A type (Standard or Reporting)
- A layout (such as one column, two column, etc.)
- One or more components

Screen Types

Table A-13

Screen type	Description
Standard	The Standard screen is the most flexible of all of the screen types, and it allows you to add all of the component types.
Reporting	The Reporting screen provides access to reports and graphs that have been supplied with Merchant Desktop.

About Components

Components are boxes of content that are placed in a screen. Components are similar to the windows you are familiar with in the Windows operating system—you may resize them, minimize them, maximize them, change their position, and close them.

Each component belongs to a parent (or owner) screen. Thus, you may access and view that component only from that parent screen. Because of this ownership, the administrator may or may not allow you to customize each component.

The same component may appear multiple times on one screen, and it may appear on multiple screens.

On the Merchant Desktop, components are identified by borders and controls such as a pencil button and an X in the upper-right corner. Component windows consist of the following:

- Properties that are common to all components, such as:
 - A type, which determines the content and properties you can set
 - A title bar description
 - A size and position in its parent (owner) screen
 - A skin (color scheme) inherited from its parent (owner) screen
- Properties that are unique to each component, such as scrolling patterns for the news feed component or specific URLs for the HTTP links component

Component Types

Each component type determines the content you may add as well as the properties you may set. Merchant Desktop provides the following component types:

- [News Feed Component Type](#) on page A-67
- [HTTP Links Component Type](#) on page A-68
- [HTML Component Type](#) on page A-68
- [Report Component Type](#) on page A-68
- [Graph Component Type](#) on page A-69
- [Parameters Common to All Component Personalization Screens](#) on page A-69

News Feed Component Type

Retail News

• Stores of the Future

Have consumers have begun defecting from the culture of shopping? The New York Times reports that some say, "yes," pointing to micro assortments of well-chosen goods as the answer. Free registration required....

The news component is designed to display retail and other news headlines as RSS (Rich Site Summary or Really Simple Syndication) feeds.

To pause the scrolling or fading, simply place the mouse pointer on the text. When you move the pointer, the text begins scrolling or fading again.

When you click any of the listed story titles, a new browser window opens with the text of the story.

Table A-14

If this message appears	Do this
Error parsing RSS NEWS FEED. Bad XML File.	Wait until the host site updates its XML file. The XML file contains the contents of the news feed.
Error in RSS News Feed.	Wait until the host site updates its XML file. The XML file contains the contents of the news feed.
Too much data to download.	Decrease the number of links displayed and/or hide the summaries/first sentences. (Click the pencil button and complete the resulting News Component Feed screen). This message appears when the XML contains greater than 10,000 characters for display.

Note: This section describes the function of the News Feed component, not its contents. If you are unsure about the contents, see the administrator.

Otherwise, to change the appearance or contents of this News Feed component, click the pencil button in the title bar and you will see the News Feed Component screen. If the pencil button is not present in the title bar, the administrator has prohibited this component from being changed.

HTTP Links Component Type



The HTTP Links component displays links to any web site. For example, you may want to display links to competitors' web sites, or you may want to display links to sites that you access often throughout the day.

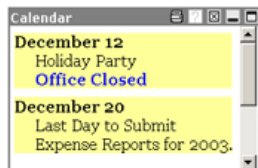
When you click a link, a new browser window opens. To return to Merchant Desktop, do any of the following:

- Close the browser window that just opened.
- Press Alt+Tab until the Internet Explorer Merchant Desktop icon is selected.

Note: This section describes the function of the HTTP Links component, not its contents. If you are unsure about the contents, see the administrator.

Otherwise, to change the appearance or contents of this HTTP Links component, click the pencil button in the title bar and you will see the HTTP Components screen. If the pencil button is not present in the title bar, the administrator has prohibited this component from being changed.

HTML Component Type



The HTML component displays information that originates in HTML format. It is intended for displaying corporate calendars, promotional event dates, company intranets, etc.

Note: This section describes the function of the HTML component, not its contents. If you are unsure about the contents, see the administrator.

Otherwise, to change the appearance or contents of this HTML component, click the pencil button in the title bar and you will see the HTML Component screen. If the pencil button is not present in the title bar, the administrator has prohibited this component from being changed.

Report Component Type



The Report component provides you with a single report specific to your company's data.

While the Reporting screen (see ["Screen Types"](#) on page A-66) provides access to all graphs and reports, you may want to set up a component for a specific report for which you have created custom filters. For that case, Merchant Desktop provides you with this Report component (as well as a ["Graph Component Type"](#) on page A-69).

Note: This section describes the function of the Report component, not its contents. If you are unsure about the contents, see the administrator.

To change the appearance or contents of this Report component, click the pencil button in the title bar and you will see the Reports Component screen. If the pencil button is not present in the title bar, the administrator has prohibited this component from being changed.

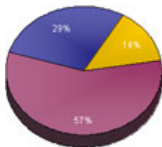
Graph Component Type



The Graph component provides you with various graphical visual aids you may personalize to your company's data.

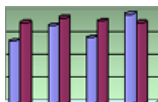
While the Reporting screen (see ["Screen Types"](#) on page A-66) provides access to all graphs and reports, you may want to set up a component for a specific graph that you have customized. For that case, Merchant Desktop provides you with this Graph component (as well as a ["Report Component Type"](#) on page A-68).

Pie Charts



MicroStrategy comes with the ability to create Pie charts and display them through the Merchant Desktop.

Bar and Line Charts



MicroStrategy comes with the ability to create line and Bar Charts that may be displayed through the Merchant Desktop.

Note: This section describes the function of the Graph component, not its contents. If you are unsure about the contents, see the administrator.

To change the appearance or contents of this Graph component, click the pencil button in the title bar and you will see the Graph Component screen. If the pencil button is not present in the title bar, the administrator has prohibited this component from being changed.

Other

MicroStrategy comes with various types of Graphs you may access through the Merchant Desktop. To explore your options, go to the Reports Tab and click on the Preferences option and the Graph display hyperlink. Follow the Micro Strategy Help.

Parameters Common to All Component Personalization Screens

All components provide the following parameters, which affect the title bar, component window padding and height, and whether or not you want to use administrator default settings.

Note: If any of the parameters listed below are missing from the screen, the administrator has prohibited that parameter from being edited.

Display Name: Type the text that you want to appear in the title bar of the component window, up to 50 characters.

Description: Type any notes or information that you want to remember about this component. This information appears only on the user personalization screens - it does not appear on the component window itself. The maximum number of characters allowed is 255.

Padding Width: This option determines the amount of padding (spacing) around each component, and thus, in combination with the other components, the amount of spacing between components.

Select one of the options described in the following table.

Table A-15

Option	Description
Thin	Approximately 5 pixels around each component window, resulting in approximately 10 pixels between components.
Medium	Approximately 10 pixels around each component window, resulting in approximately 20 pixels between components.
Thick	Approximately 20 pixels around each component window, resulting in approximately 40 pixels between components.

Height: Height applies only to component windows in the 1-, 2-, and 3-column layouts. If the component window is in a fixed layout (such a Layout 1, Layout 1 Inverted, etc.), the height of the component window is set in the screen layout and you cannot change it. You can set the height in pixels or percent, as follows:

- **Pixels** - In general, a pixel is one tiny square of an image on your monitor, and the exact size of the pixel depends on the resolution of your monitor. Because of this, you may need to experiment with the number of pixels you enter. Enter pixels in whole numbers.
- **Percent** - Type the percentage of the screen that you want the component window to use. Enter the percents in whole numbers.

Title Bar: The title bar is the top row of the component window, which displays the pencil, help, minimize, maximize, and, when applicable, restore buttons.

- Select **Show** to display the title bar.
- Select **Hide** to show only the border of the component window with no title bar. If you later want to Show the title bar, follow this procedure:

To show a hidden title bar:

1. For the screen that contains the component with the hidden title bar, click the screen tab and corresponding pencil button
2. On the Screen Personalization screen in the graphic of the screen layout, click the pencil button of the component whose title bar you want to show.
3. On the component personalization screen, select the **Show** option and click the **Save** button.
4. On the Screen Personalization screen, make any other changes necessary and then click the **Save** button.

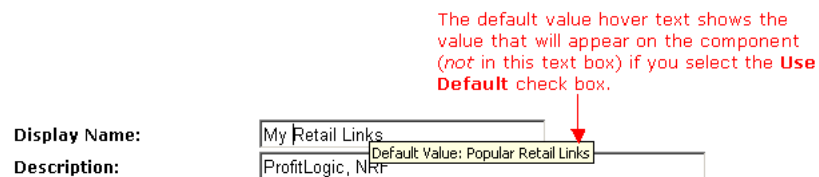
The screen appears, and the title bar is back on the component window.

Use Default: This check box determines whether or not you want to use the entry set by the administrator:

- If you want your changes to be in effect, regardless of any changes the administrator makes to this component parameter, clear the Use Default check box. When you select the Use Default check box, the parameter is disabled. To enable it for editing, you must clear the Use Default check box.

For example, if you add your favorite retail web site to an HTTP links component and the administrator adds a new one, the component will not display the new site until you clear the Use Default check box.

To determine what the administrator's default value is before you clear the Use Default check box, hover (place the mouse pointer over) the parameter. The hover text that appears displays the administrator's default value.



- If you want the component to display all of the changes the administrator makes to this particular parameter, select the Use Default check box.

In this case the parameter would be automatically updated for you each time the administrator made a change.

Troubleshooting

This section includes the following information:

- [Merchant Desktop Problems and Solutions](#) on page A-71

Merchant Desktop Problems and Solutions

Following are problems and solutions for the Merchant Desktop feature.

Note: At the end of the table are several blank spaces for you to record problems and solutions specific to your company and customized implementation.

Table A-16

Problem	Solution
I can't change anything, and there are no pencil buttons.	This occurs when your user account is assigned a read-only role that prohibits any changes. If you want to be able to customize some Merchant Desktop features, ask the administrator to update your user account.
The help lists some options that don't appear on my screens.	The help system shows all of the available Merchant Desktop options, but your user account may be prohibited from using those options. When this is the case, the option does not appear in the user interface. For example, if your user account prohibits adding web sites to the HTTP links component, the Add button does not appear on the HTTP links personalization screen.
There are some changes on my Merchant Desktop view, screen, or component that I didn't make.	<p>When this occurs, most likely Merchant Desktop is configured so that you automatically receive updates from the administrator. To avoid this, clear the Use Default check box (the "default" is any change the administrator makes). You must do this for each parameter that you do not want to be updated. If later you do want the administrator updates, select the Use Default check box.</p> <p>If the Use Default check box does not appear on your screens, the administrator has turned that option off.</p>
The administrator made some changes to the view, screens, or components, but I didn't receive the changes.	<p>Check the settings for the Use Default check boxes. For each parameter, you can receive updates from the administrator only if the check boxes is selected.</p> <p>If the check boxes are selected, try quitting all of the open browser windows and then logging in to Merchant Desktop again.</p>
I hid the title bar on a component. How do I get it back?	<p>If the pencil button is not available, you must ask an administrator to do this for you.</p> <p>To show a hidden title bar:</p> <ol style="list-style-type: none"> 1. For the screen that contains the component with the hidden title bar, click the screen tab and corresponding pencil button. 2. On the Screen Personalization screen in the graphic of the screen layout, click the pencil button of the component whose title bar you want to show. 3. On the component personalization screen, select the Show option and click the Save button. 4. On the Screen Personalization screen, make any other changes necessary and then click the Save button. <p>The screen appears, and the title bar is back on the component window.</p>
I can't scroll to all of the prompts on the Top/Bottom screen	If you have a scroll wheel on your mouse, use that to scroll down on the screen. Otherwise, use the horizontal scroll bar to scroll to the right until the MicroStrategy vertical scroll bar appears.
Only one of my fading news feeds shows news, but the other one is blank	Replace one of the fading news feed components with a different news feed display, such as static. Currently, you can have only one fading news feed per screen.

Table A-16 (Cont.)

Problem	Solution
I clicked a tab and the screen components are taking a long time to load, but when I click a different tab to go to another screen, that screen won't appear	This situation can occur when the screen you are accessing has multiple MicroStrategy reports and/or graphs. Sometimes you must wait until the reports or graphs have loaded before you can navigate to another screen.
My password is no longer working	Passwords are case-sensitive, so make sure that the Caps Lock is off. In addition, if the administrator has changed your password or user name recently, it's possible that Internet Explorer is using the wrong stored password. This can occur when the only change in the user name or password is case.
Everything was working fine, but then I clicked a link and this message appeared: This page cannot be displayed	When this message appears, quit the browser and then start it again and access Merchant Desktop. If that does not solve the problem, the server may be down. Inform the administrator.
A MicroStrategy log on screen appears instead of the reporting screen, and when I attempt to use the log on screen, nothing happens.	<p>This can occur in the following circumstances:</p> <ul style="list-style-type: none"> ■ The MicroStrategy Intelligence Server and Web Universal application are not available. ■ The password you are using is invalid, or your user name and password are not in the MicroStrategy users database. <p>In both of these cases, notify the administrator.</p>
The following Job Expired message appears when I attempt to access a report or graph: The results for this report are no longer available. Please submit the request again.	This is a MicroStrategy error message. When it occurs, click the Re-Execute Report button. Typically the report will update when you click this button.
Accessing the Reporting screen or any screen that contains a report or graph takes a long time.	The slow access time should occur only the first time you access reporting. All subsequent times should be much quicker.
The following message appear when I am using MicroStrategy, particularly the Top/Bottom screen: The Web Server encountered an unknown runtime error.	This is a MicroStrategy error message. When it occurs, click the Top/Bottom tab in the Merchant Desktop view. This refreshes the screen, and you can then select your filters and execute your report.
When a graph first appears, it fits in the component window, but when I drill down or navigate to a different page, the graph becomes larger than the component window.	<p>This is a known issue with the MicroStrategy Web Universal application. When it occurs, you must navigate to a different screen and then back to the screen that contains the graph.</p> <p>If you find this happens too frequently, ask the administrator to place the graphs in larger component windows. In some cases, you might even want one graph per screen, depending on the complexity of the graph.</p>
I drilled down through a graph or report, but now I can't drill back up.	In MicroStrategy reports and graphs, there is no way to drill back up. Instead of re-executing the graph or report, MicroStrategy recommends using the browser back button.
Some folders in the Selected Report or Selected Graph tree won't close.	You cannot close the folder (or the parent folder) that contains the selected report.

Table A-16 (Cont.)

Problem	Solution
I want to select a report or graph for one of the report or graph components, but there are no folders under the Please Select a Report folder.	This occurs when the MicroStrategy Intelligence Server and Web Universal application are not available. It can also occur when your user name is not in the MicroStrategy user database. Notify the administrator.
I want to change the type of layout of a screen but can't find a way to do it in the user interface.	It is currently not possible to change the layout of a screen. Instead, you must create a new screen.
For components in open layouts (i.e., 1-, 2-, and 3-column), very large height parameters cause unpredictable window sizes.	Ultimately, the effects of height and width are controlled by the browser, not by Merchant Desktop. If the browser window sizing is not working as you expect, try decreasing the height of component windows.

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