

# **Oracle® Retail Plan**

Administration Guide

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# Contents

<b>Preface</b> .....	vii
Audience .....	vii
Documentation Accessibility .....	vii
Related Documents .....	viii
Conventions .....	viii
 <b>1 Managing User Accounts</b>	
<b>Overview of User Management</b> .....	1-1
About User Account Roles .....	1-1
About Hierarchy Levels .....	1-2
About Assigning Roles and Hierarchies .....	1-2
<b>User Account Roles</b> .....	1-2
User Management Roles .....	1-2
Plan Roles .....	1-3
<b>Managing User Accounts</b> .....	1-3
Starting User Management .....	1-3
Changing the Password for the Default User Account .....	1-4
Creating a User Account .....	1-5
Assigning Roles and Hierarchy Levels to a User Account .....	1-6
Modifying User-Related Information .....	1-7
Modifying Role and Hierarchy Assignments .....	1-7
Removing User Accounts .....	1-8
Locking and Unlocking User Accounts .....	1-9
Resetting User Password .....	1-9
<b>Working with the User Management User Interface</b> .....	1-10
Sorting Columns .....	1-10
Rearranging Columns .....	1-10
Hiding Columns .....	1-11
Printing and Exporting User Account Information .....	1-11
<b>Troubleshooting User Management Errors</b> .....	1-12
Unable To Perform Request: System Error .....	1-12
User Cannot Log In .....	1-12
 <b>2 Managing Business Rules</b>	
About Business Rules .....	2-1

<b>Plan Business Rules .....</b>	<b>2-2</b>
<b>Understanding the Business Rule Management User Interface .....</b>	<b>2-3</b>
Business Rules Filters Panel.....	2-3
Business Rules Grid Panel .....	2-4
<b>Locating Your Business Rules.....</b>	<b>2-4</b>
Browsing Through the Hierarchies .....	2-4
Expanding the Hierarchies Within the Grid .....	2-5
Finding a Hierarchy Entity .....	2-6
<b>Modifying the Business Rule Settings.....</b>	<b>2-8</b>
<b>Copying the Business Rule Settings.....</b>	<b>2-9</b>
<b>Removing the Business Rule Settings .....</b>	<b>2-9</b>
<b>Viewing the History of All the Business Rule Modifications.....</b>	<b>2-10</b>
About the Business Rule History Screen .....	2-10

### 3 Managing Store Sets

<b>Understanding Store Sets and Subsets .....</b>	<b>3-1</b>
<b>Accessing the Store Set Management Utility.....</b>	<b>3-1</b>
<b>Working with the Store Set Management User Interface.....</b>	<b>3-2</b>
Creating New Store Sets.....	3-2
Copying the Selected Store Set.....	3-3
Renaming the Selected Store Sets .....	3-3
Merging the Selected Store Sets .....	3-4
Removing the Selected Store Sets .....	3-4
Viewing Other Store Sets .....	3-4
Printing and Exporting the Store Set Information .....	3-6
Sorting the User Account Information.....	3-6
Customizing the Columns .....	3-7
Finding Stores .....	3-7
<b>Managing Subsets .....</b>	<b>3-8</b>
Creating a New Subset .....	3-8
Adding Stores to a Subset .....	3-9
Renaming the Selected Subsets .....	3-9
Combining the Selected Subsets .....	3-9
Removing the Selected Subsets .....	3-10
Changing the Store Set Type to Static .....	3-10
Filtering the Subsets.....	3-10
Customizing the Table.....	3-11
Printing or Exporting Information .....	3-11

### 4 Managing Reports

<b>Accessing the Reports.....</b>	<b>4-1</b>
Report Data .....	4-1
<b>Creating Reports.....</b>	<b>4-2</b>
<b>Post-Installation Configuration.....</b>	<b>4-3</b>
<b>Merchant Desktop Administration.....</b>	<b>4-6</b>
Getting Started with Views and Their Elements .....	4-7
Updating the “Unassigned View” Message.....	4-7

About Views, Screens, and Components.....	4-7
Good Practices .....	4-8
Copy the Sample Views, Screens, or Components .....	4-8
Lock Views, Screens, or Components until You Are Ready to Share Them .....	4-8
Test Your Views, Screens, or Components with Test User Accounts .....	4-9
Understanding Updates .....	4-9
Forcing Updates .....	4-9
Modifying and Deploying Sample Views and Their Elements.....	4-9
Creating and Deploying Views and Their Elements .....	4-11
Creating a Component .....	4-11
Creating a Screen.....	4-11
Adding Components to a Screen .....	4-12
Creating a View .....	4-12
Adding Screens to a View .....	4-13
Assigning a View to a User.....	4-13
Screen Administration.....	4-14
Create Screen .....	4-16
Copy Screen .....	4-20
Edit Screen .....	4-20
Delete Screen.....	4-22
View Administration .....	4-23
Assign View .....	4-24
Create View.....	4-24
Copy View.....	4-25
Edit View .....	4-26
Delete View .....	4-27
Component Administration .....	4-27
Create Component.....	4-29
Copy Component.....	4-32
Delete Component .....	4-32
Unassigned View .....	4-32
Alerts Component.....	4-33
HTML Component .....	4-33
HTTP Links Component.....	4-34
News Feed Component.....	4-35
Product Links Component .....	4-36
Report Component .....	4-38
Graph Component.....	4-38
Filter Component .....	4-39
Parameters Common to All Component Screens.....	4-41
<b>Personalizing Merchant Desktop.....</b>	<b>4-44</b>
About Personalization .....	4-44
Personalization Privileges.....	4-45
Personalizing Your View .....	4-45
Personalizing Screens .....	4-46
Personalizing Components.....	4-48
About Views .....	4-49

About Screens .....	4-49
Screen Types .....	4-50
About Components.....	4-50
Component Types.....	4-50
News Feed Component Type.....	4-50
HTTP Links Component Type.....	4-51
HTML Component Type .....	4-52
Report Component Type .....	4-52
Graph Component Type .....	4-53
<b>Troubleshooting.....</b>	<b>4-54</b>

## **Index**

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# Preface

This guide enables you to perform the following administration tasks:

- Managing user accounts
- Managing business rules
- Managing store sets

## Audience

This guide is intended for Plan administrators and assumes that you are familiar with the following:

- Security (access control, permissions, and authorization)
- Retail domain metrics and terminology
- Any company-specific policies, such as your naming conventions for merchandise and location hierarchies, naming conventions, and business practices

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**Note:** This guide describes the default implementation and default on screen labels. Your company may have customized the labels. In those situations, the screen labels on your user interface may not match the screen labels described in this guide.

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## Related Documents

For more information about using Plan, see the following documents:

- *Plan Installation Guide*
- *Plan Configuration Guide*
- *Plan Operations Guide*
- *Plan User Guide*

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	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.

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# Managing User Accounts

Each person using the Oracle Retail application needs a user account with specific permissions, which determine what specific tasks that person can perform. This chapter includes the following sections:

- [Overview of User Management](#)
- [User Account Roles](#)
- [Managing User Accounts](#)
- [Working with the User Management User Interface](#)
- [Troubleshooting User Management Errors](#)

## Overview of 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 *Plan Configuration Guide*. This guide assumes that most of your user accounts have already been created, by means of the Bulk Loader.
- If you need to add or modify **one or two** user accounts, use the User Management user interface as described in this chapter.

User account permissions consists of a combination of specific *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. Plan 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 *Plan 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

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**Important:** Setting the location hierarchy level below the chain level is not supported in Plan and may result in unpredictable behavior.

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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-location hierarchy combination, you do so by specifying the roles and their associated hierarchies. For example, to assign 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

## User Account Roles

Plan ships with the following types of user account roles:

- [User Management Roles](#)
- [Plan Roles](#)

## User Management Roles

User Management roles enable you 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 on, 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 on, the User Management link opens to a password management dialog box.

The application 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 the 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](#).
- 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.

## Plan Roles

Plan comes with the following default 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

The User Management user interface enables you to add, modify, or remove user accounts. It also enables you to assign or modify the hierarchy levels assigned to a user account.

This section describes how you can effectively use the User Management user interface to manage the user accounts. It includes the following tasks:

- [Starting User Management](#)
- [Changing the Password for the Default User Account](#)
- [Creating a User Account](#)
- [Assigning Roles and Hierarchy Levels to a User Account](#)
- [Modifying User-Related Information](#)
- [Modifying Role and Hierarchy Assignments](#)
- [Removing User Accounts](#)
- [Locking and Unlocking User Accounts](#)
- [Resetting User Password](#)

### Starting User Management

The User Management utility is available after you have installed the application, and it is accessible via the application main menu.

To access the User Management utility for the first time, use the default user name and the associated password to log on to the application. This user account is a special

account that provides access to all the User Management functions, and provided to you during the implementation.

After you log on for the first time, you can create accounts for the additional users who need access to the User Management utility. In addition, you might want to change the *root* user account password. For more information, see [Changing the Password for the Default User Account](#).

To manage user accounts:

1. Open a browser and enter the application URL, similar to the following:

`https://servername:portnumber/plan/PlanLogin.do`

**Table 1–1    Servername and Portnumber Description**

Where	Is
servername	The name of the application server where the application is installed.
portnumber	The port number that the application server uses for the application.

The **login** screen appears.

2. Enter the root user name and password, and click **Login**.

The **main menu** appears with the **User Management** link.

3. Click the **User Management** link.

The Manage Users screen appears with a list of user accounts. For information about creating user accounts, see [Creating a User Account](#).

To quit User Management, click the **Close** link. The main menu appears.

## Changing the Password for the Default User Account

When you first access the User Management utility, you must use the default user account already set up for you. For security reasons, you must change the password associated to this account.

To change the password for the root account:

1. On the **Manage Users** screen, select **Change Password** from the **Action** list, and then 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

You must create a user account for each user who needs access to the application. For each user account, you must then assign one or more roles that determine what products and features a user can access.

There are two ways to create user accounts:

- If you need to create multiple user accounts all at once, use the User Management Bulk Loader utility. For more information, see the section *Understanding the User Management Bulk Loader Utility* in the *Plan 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. On the **Manage Users** screen, select **Add New User** from the **Action** list, and then click **Apply**.

The **Add New User** dialog box appears.

2. Complete the **Add New User** dialog box fields, as shown in the following table:

**Table 1–2 User Account Elements**

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.
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	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 you have created the user account, the next step is to assign the appropriate permissions as described in [Assigning Roles and Hierarchy Levels to a User Account](#).

## 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 [Overview of User Management](#).

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**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 *Plan Configuration Guide*.

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To assign roles to a user account:

1. From the **Manage Users** screen, select the user account to which you want to assign roles.
2. From the **Action** list, select **User Roles**, and then click **Apply**.  
The **Role Assignment for username** screen appears.
3. From the **Action** list, select **Add Role Assignment**, and then 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 Plan, see [User Account Roles](#). 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 hierarchy levels you want this user to be able to access.

To navigate down the hierarchy, hover your mouse pointer over the right arrow in the hierarchy. Keep navigating until the target level appears, and then click it.

**Figure 1–1 Assigning Hierarchy Levels to the Role**

Role	Merchandise	Location
PRICE_APPROVER	◀ DIVISION: 32 ▶	◀ DISTRICT: 100070 ▶

- To navigate down a hierarchy, use the right arrow.
- To navigate up a hierarchy, use the left arrow.

Role	Hierarchy
Business Rule Manager	The hierarchy levels determine the items and pricing groups for which a user can view/update business rules.
Plan	The entire location hierarchy is within the scope of every action.

6. After 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](#).
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.

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**Note:** If you assign different roles within the same hierarchy levels, the role with the most privileges takes precedence. For example, if you assign a read-only role **and** a power user role for the same hierarchy, the power user role for that hierarchy is used when the user logs on.

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## Modifying User-Related Information

Modifying user-related information involves changing 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 the employee has been reassigned to other tasks.

If you want to change the **permissions** associated with a user account, see [Modifying Role and Hierarchy Assignments](#).

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**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 *Plan Configuration Guide*.

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To modify a user account:

1. On the **Manage Users** screen, select the user account you want.
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 the 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

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**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 *Plan Configuration Guide*.

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To modify a role:

1. From the **Manage Users** screen, select 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 any of the following:

To	Do this
Assign a role	<ol style="list-style-type: none"> <li>1. From the <b>Action</b> list, select <b>Add Role Assignment</b>, and then click <b>Apply</b>. For a list of available roles, see <a href="#">User Account Roles</a>.</li> <li>2. On the <b>Add Role Assignment</b> dialog box, select a role and its associated hierarchy levels, and click <b>Done</b>.</li> </ol>
Change the hierarchy levels	<ol style="list-style-type: none"> <li>1. Select the roles for which you want to change the hierarchy levels. For information about hierarchy levels, see <a href="#">About Hierarchy Levels</a>.</li> <li>2. From the <b>Action</b> list, select <b>Edit Role Assignment</b>, and then click <b>Apply</b>.</li> <li>3. On the <b>Edit Role Assignment</b> dialog box, select the new hierarchy levels. (Alternatively, you could select a new role and keep the hierarchy levels.)</li> </ol>
Remove a role	<ol style="list-style-type: none"> <li>1. Select the roles you want to remove.</li> <li>2. From the <b>Action</b> list, select <b>Delete Role Assignment</b>, and then click <b>Apply</b>. The role is removed immediately.</li> </ol> <p><b>Caution:</b> There is no undo, and there is no confirmation dialog box.</p>

4. When the screen reflects the changes, click **Done**.

The change take effect the next time the user logs on.

## Removing User Accounts

Removing a user account makes the user name and password invalid for logging on, but it preserves the user name and other elements for reports and historical data. You may want to remove an user account when the assigned user moves to a different position or no longer needs access.

When you remove a user account, that account is preserved in the database for reports and historical data, but the account can never be activated again. Use caution when removing a user account.

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**Important:** Removing 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](#). If you want to reassign a user account to another person, see [Modifying User-Related Information](#).

---

To remove a user account:

1. On the **Manage Users** screen, select the user accounts you want to remove.
2. From the **Action** list, select **Inactivate User**, and then click **Apply**.  
A confirmation dialog box appears.
3. Click **Yes** to remove the user account.

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.

## Locking and Unlocking User Accounts

Use the *Lock and Unlock Accounts* features to control user access to the application. Locking an user account restricts access to the software temporarily, and the account can be unlocked with all the access privileges assigned to the user restored.

To lock a user account:

1. On the **Main Menu**, click the **User Management** link.
2. On the **Manage User** screen, click the check box next to the user account you want.
3. From the **Action** list, select **Lock Account**, and then click **Apply**.

A confirmation dialog box appears.

4. Click **Yes**.

To unlock a user account:

1. On the **Main Menu**, click the **User Management** link.
2. On the **Manage User** screen, click the check box next to a locked user account you want.
3. From the **Action** list, select **Unlock Account**, and then click **Apply**.

A confirmation dialog box appears.

4. Click **Yes**.

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**Note:** An user account gets locked after a specific number of attempts to log in to the software. Use the *Unlock Accounts* feature to unlock the accounts. Users will then need to change their passwords to log in to the software.

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## Resetting User Password

Use the *Expire User Password* feature to reset the password for the user account you want. Once done, the user will need to define a new password and then log in to the software.

To reset a user password:

1. On the **Manage User** screen, click the check box next to the user account you want.
2. From the **Action** list, select **Expire User Password**, and then click **Apply**. A confirmation dialog box appears.
3. Click **Yes**.

## 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 then click **Apply**.

The **Customize Table** dialog box appears.

2. On the **Sort Table** tab, enter a sort criteria in the following manner:

- 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 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 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

You can rearrange the columns on the following User Management screens:

- Manage Users
- Role Assignments for username

To rearrange the columns:

1. From the **Action** list, click **Modify Columns**, and then click **Apply**.

The **Customize Table** dialog box appears.

2. On the **Change Columns** tab, 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.

## Hiding Columns

You can hide columns on the following User Management screens:

- Manage Users
- Role Assignments for username

To hide (or show) columns:

1. From the **Action** list, click **Modify Columns**, and then click **Apply**.  
The **Customize Table** dialog box appears.
2. On the **Change Columns** tab, 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.

## 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 Microsoft 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](#)).

To print or export user account information:

1. From the **Action** list on the screen you want, select **Print or Export**, and then 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 indicate the number of rows and

the columns, which helps you to estimate how long the print or export process will take.

2. Do one of the following:

To	Do This
Print the user data on the screen (not the screen itself)	Click <b>Print</b> and complete the resulting print dialog box as you normally would.
Export the data to a Microsoft Excel spreadsheet	<ol style="list-style-type: none"> <li>1. Click <b>Send to Excel</b>.</li> <li>2. On the resulting Save As dialog box, enter a file name and click <b>Save</b>. An <b>Export Complete</b> message appears along with the path and file name of the Excel file, and the Excel file opens.</li> </ol>

## Troubleshooting User Management Errors

This section enables you to troubleshoot the following user account management errors:

- [Unable To Perform Request: System Error](#)
- [User Cannot Log In](#)

### 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 Plan 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.

---

## Managing Business Rules

Business rules specify the constraints that an application uses when performing calculations, forecasts, and other automated processing.

This chapter contains the following sections:

- [About Business Rules](#)
- [Plan Business Rules](#)
- [Understanding the Business Rule Management User Interface](#)
- [Locating Your Business Rules](#)
- [Modifying the Business Rule Settings](#)
- [Copying the Business Rule Settings](#)
- [Removing the Business Rule Settings](#)
- [Viewing the History of All the Business Rule Modifications](#)

### About Business Rules

Business rules are applied to items, not to the pricing groups. Instead, business rules apply for each item regardless of membership in a pricing group. When items in the same pricing group have differing out dates, target sell throughs, salvage values, and so on, the final value is derived by rules set during the implementation.

---

**Note:** Although business rules are applied to items instead of pricing groups, typically business rules are set at higher levels in the merchandise hierarchy than the item level.

---

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

## Plan Business Rules

The following table describes the business rules shipped along with the Plan application:

**Table 2–1 Plan Business Rules**

Name	Description
AUR_ADJUSTMENT_PCT	<p>The average unit retail discount percent. Used in the display of new plans.</p> <p>Default Label: Average Unit Retail Discount Percent</p> <p>Default Value: 12</p>
ANNUAL_BASICS_PLAN_MIN	<p>Optional. The minimum annual receipt quantity. Used to calculate the minimum value for new basic items and to validate basic items.</p> <p>Default Label: Annual Basics Plan Minimum</p> <p>Default Value: 12</p>
SAFETY_STOCK	<p>The additional time, in days, to stock an item so that it is not out-of-stock.</p> <p>Default Label: Safety Stock</p> <p>Default Value: 14</p>
TOLERANCE_PCT	<p>The acceptable variance, expressed as a percent, from the Store Financial Plan.</p> <p>Default Label: Tolerance Pct</p> <p>Default Value: .1</p>
OOS_VALID_DAYS_OF_MONTH	<p>Optional. List of days that are valid as out-of-stock days.</p> <p>Default Label: Out Of Stock Valid Days of Month</p> <p>Default Value: 1,15</p>
PRODUCT_GROUP_ATTR	<p>Indicates whether or not Product Groups are auto-generated or not. If auto-generated, also indicates which merchandise column is the source.</p> <p>Default Label: Product Group Attribute</p> <p>Default Value: None (not auto-generated)</p>

## Understanding the Business Rule Management User Interface

This section provides an overview of the Business Rule Management user interface.

To access the Business Rule Management utility:

- From the main menu, click **Business Rule Management**.

The Business Rules screen appears.

**Figure 2–1 Business Rules Screen**

The Business Rules Manager screen has the following panels:

- Filters Panel – enables you to quickly navigate to any hierarchy level.
- Grid Panel – displays the business rules.

### Business Rules Filters Panel

The Filters panel enables you to quickly navigate to any hierarchy. The Filters panel is collapsible; once you find the hierarchy you want, you can close the Filters panel to make more room for the display of your business rules.

To close the Filters panel, click the double left-arrow (<<) button. To later display the Filters panel, click the double right-arrow (>>) button.

The following table describes the fields that appear in the Filters panel:

**Table 2–2 Business Rules Filters Panel Fields**

Field	Description
<b>Merchandise and Location Sections</b>	
Browse	Use the Browse button to navigate to the hierarchy level you want.

**Table 2–2 (Cont.) Business Rules Filters Panel Fields**

Field	Description
Find	Specify the hierarchy level you want, and click Filter.
Attributes Section	Select the attributes that you want to use to filter within the current hierarchy levels. <ul style="list-style-type: none"> <li>■ To filter using no attributes, select the blank line.</li> <li>■ To filter using all the attributes, select <b>Any</b>.</li> </ul>
<b>Show Rules Section</b>	
Higher levels with rules	Select this filtering rule to display inherited business rules (rules, set at the higher levels in the hierarchy, inherited by an item at a lower level).
Only filtered level	Select this filtering rule to display the business rules at a specific level. The Business Rules screen displays the rules at the item level in the Merchandise and Location hierarchy. Rows that precede this level do not appear.
Set the table levels in the View option	Select this filtering rule to display the levels at which rule values can be updated.

## Business Rules Grid Panel

The Business Rules Grid panel displays the business rules based on the filters that you have set up in the Filters panel. The panel displays a grid that provides information from the top level of both the Merchandise and Location hierarchy, including all the attributes. The following table describes the border and shading features used in the grid:

Feature	Description	Indicates
Border	Black border	You can edit the value.
	Gray border	You cannot edit the value.
Cell color	Green cell	The rule value has been edited.
	Normal cell	The rule value has not been edited.
Text color	Black text	The rule value has been set at this level.
	Gray text	The rule value has been inherited.

## Locating Your Business Rules

Business rules may be set on one or more levels in the hierarchies. There are several ways to locate your business rules:

- [Browsing Through the Hierarchies](#)
- [Expanding the Hierarchies Within the Grid](#)
- [Finding a Hierarchy Entity](#)

## Browsing Through the Hierarchies

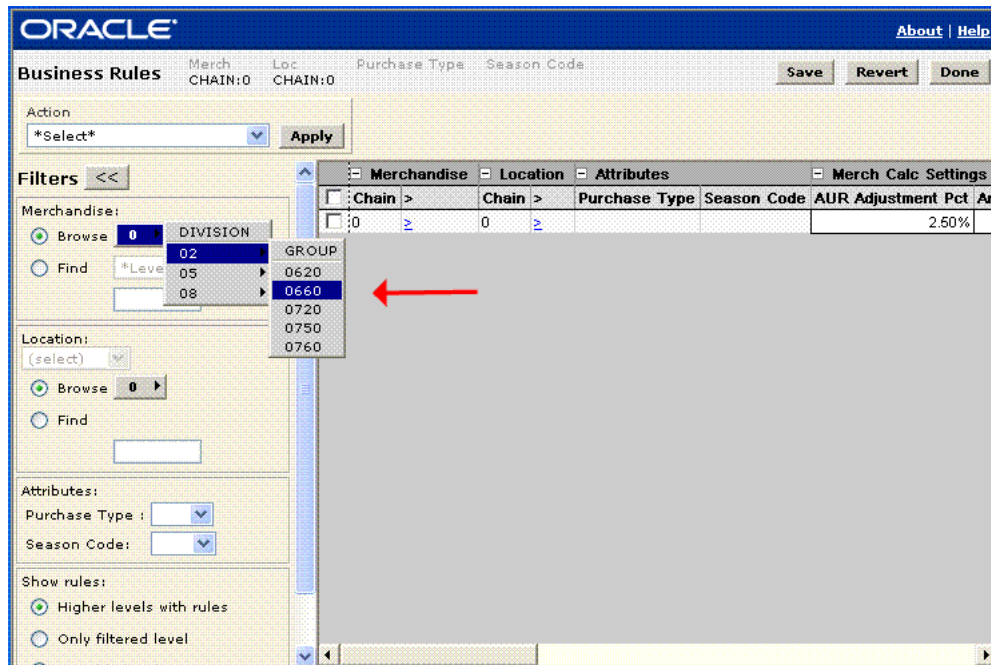
The Business Rule Management user interface enables you to select a node in the Merchandise and Location hierarchies by using expandable menus. This section helps you to use the expandable menus to effectively navigate through the hierarchies.

To navigate through the hierarchies:

1. On the Filters panel, under **Merchandise** or **Location**, click **Browse**.
2. Move the mouse pointer over the right arrow, next to Browse, to navigate through the hierarchy levels.
3. Move the mouse pointer through each successive right arrow till you reach the hierarchy level you want.

The following figure shows an example of an expanded Merchandise hierarchy level:

**Figure 2–2 Browsing through Hierarchies**



4. Once you reach the level and node you want, click it.
5. Click the **Filter** button.

The Business Rules Grid panel (right pane) updates to reflect the hierarchy level you selected.

To traverse back up the hierarchy, move the mouse pointer over the left arrow of the selected hierarchy level, and navigate back to the hierarchy level you want.

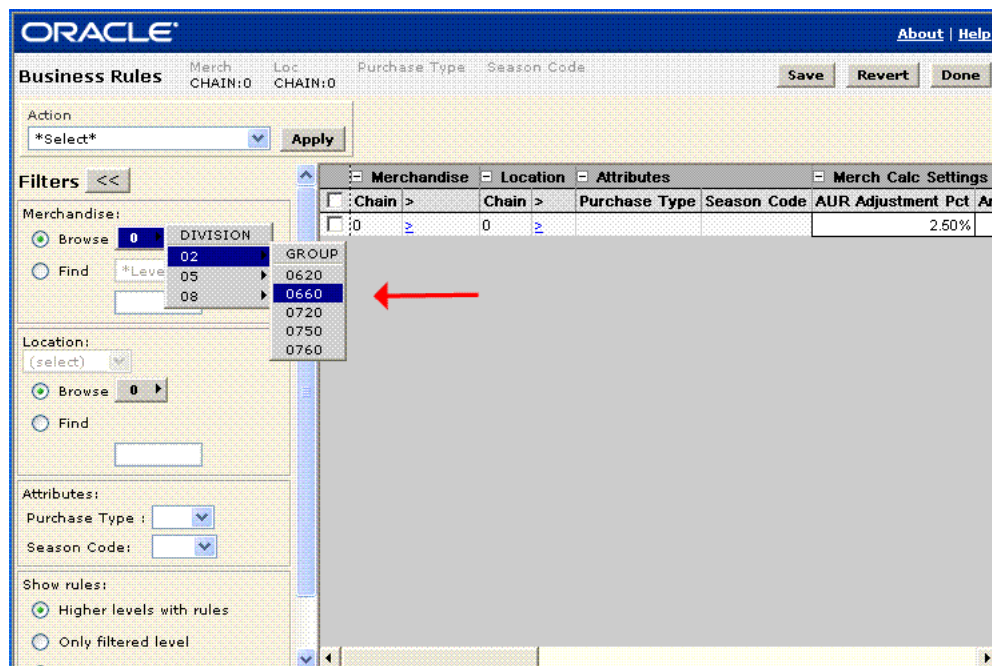
## Expanding the Hierarchies Within the Grid

To expand the hierarchies within the grid:

- In the hierarchy grid, click the blue angle bracket next to the hierarchy level.  
The grid now displays an additional column that contains the next level (for example, Department and all of its nodes Dept. 001, Dept. 002, Dept. 003, and so on). Repeat this step until you expand the hierarchy to the levels you want.

The following figure shows an example of an expanded merchandise hierarchy using this method:

Figure 2–3 Expanding the Hierarchies



## Finding a Hierarchy Entity

You can use the Find feature to navigate to a node (an entity on a hierarchy). Common examples of node identifiers are style, product, or store code, and so on.

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., and so on.

To find a hierarchy entity:

1. On the Filters panel, under **Merchandise** or **Location**, click **Find**.
2. From the **Find** list box, select the level you want. For example, the Find list box for *merchandise* may include Style and Product. The Find list box for *stores* may include Region and Store.

**Figure 2–4 Finding a Hierarchy Entity**

**Business Rules** Merch CHAIN:0 Loc CHAIN:

Action:  **Appl**

**Filters** <<

Merchandise:

☐ Browse  **>**

☒ Find  **>**

DEPARTMENT  
SUB-DEPARTMENT

Location:

**>**

☐ Browse  **>**

☒ Find

Attributes:

Purchase Type :

Season Code:

Show rules:

☒ Higher levels with rules

☐ Only filtered level

3. In the text box, enter the identifier for the node (for example, style, product, region, store, and so on).
4. Click **Filter**.

If the node exists, it appears in the grid pane. Otherwise, a message appears indicating that the node could not be found.

## Modifying the Business Rule Settings

To modify the business rules:

1. Access the **Business Rule Management** utility. For more information, see [Understanding the Business Rule Management User Interface](#).
2. On the **Business Rules** screen, scroll horizontally to find the business rule you want.

**Figure 2–5** *Changing a value in a category*

Merch Calc Settings			
AUR Adjustment Pct	Annual Basics Plan Min	Safety Stock	Tolerance Pct
3.00%	12	14	10.00%

3. Modify the business rule value:
4. When you have changed the business rule values as necessary, click **Save**.

When you modify the business rule settings, any changes you make are inherited by the lower levels in the hierarchies.

---

**Note:** The rule values may be null only if that was set as the default value during implementation. To specify a null value, enter NONE.

---

## Copying the Business Rule Settings

You can copy the business rules settings from one (or more) hierarchy level/ attribute combination to another.

---

---

**Note:** Any changes that you make are inherited by the lower levels in the Merchandise and Location hierarchies. There may be some restrictions on the rules that you can copy or paste.

---

---

To copy the business rule settings:

1. On the Business Rules screen grid, use the check box next to each rule to select one or more rule sets that you want to copy.
2. From the **Action** list, select **Copy rule values**, and click **Apply**.  
The **Copy Business Rules** dialog box appears.
3. On the **Copy Business Rules** dialog box, clear the check boxes for the rule values you do not want to copy, and then click **Copy**.
4. On the Business Rules screen grid, locate and select the rule set you want to update with the copied values.
5. From the **Action** list, select **Paste rule values**, and click **Apply**.

The new business rule settings take effect immediately.

## Removing the Business Rule Settings

When you delete a business rule setting,

- The rule is not deleted from the Business Rule Management utility. Only the specified values (for a particular level) are removed.
- The values in the inherited levels are replaced with the default values that were set during implementation.

---

---

**Note:** To remove the rule values, you must have the appropriate access privileges to edit the rule values. The following border shades indicate the access privileges for a rule:

- A black cell border indicates that the rule value can be modified.
  - A gray cell border indicates that the rule value cannot be modified.
- 
- 

To delete a business rule setting:

1. On the Business Rules screen grid, navigate to the rules that you want to delete.
2. To delete a single rule, select the rule you want, and click **Delete**.

Or

To delete multiple rules, select the rules you want.

From the **Action** list, select **Delete selected rules**, and click **Apply**.

---

**Note:** A pale green shade in the cell indicate that the rule values were removed.

---

3. Click **Save**.

## Viewing the History of All the Business Rule Modifications

At any time, you can review the history of all the modifications made to a business rule. The number of prior weeks of history available in the application is determined during the implementation.

To view the business rule history:

1. Access the Business Rules Management utility. For more information, see [Understanding the Business Rule Management User Interface](#).
2. On the Business Rules screen grid, select the levels you want to review.
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 you want, 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 on a particular date, enter the date you want in both the text boxes.

5. Click **View**.

The Business Rule History screen appears with the history for the specified rule at the hierarchy levels.

6. If you want to print or export the rule history, select **Print or Export** from the **Action** list, and then click **Apply**.
7. When you are finished, click **Done** to return to the Business Rules screen.

## About the Business Rule History Screen

The Business Rule History screen is organized by Merchandise and Location hierarchy levels and then by date, with the newest date at the top of each merchandise or location grouping and the oldest date at the bottom of each merchandise or location grouping. This enables you to view how a value was modified over time.

On this screen,

- The Start Dt and End Dt columns show the time period for which the business rule and its value are effective. This can help you to determine if one or more weekly optimizations that have been affected by a particular business rule.
- The User column displays the user name of the person who made the change.

---

## Managing Store Sets

The Store Set Management Utility enables you to view and change the store set settings. It also enables you to modify the stores and subsets included in a store set. This chapter describes the tasks that you can perform to manage the store sets and subsets. It includes the following sections:

- [Understanding Store Sets and Subsets](#)
- [Accessing the Store Set Management Utility](#)
- [Working with the Store Set Management User Interface](#)
- [Managing Subsets](#)

### Understanding Store Sets and Subsets

A store set is a collection of stores and can 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 a user-specific attribute.

Store sets are classified in the following manner:

- Dynamic store sets are created and maintained by using filters. They are automatically updated whenever they are used, as the filters are re-applied or as the attributes change. You can change the store set type from Dynamic to Static to prevent automatic updates of the store set. If you manually assign a store to a store set, the store type is automatically set to Static.
- Static store sets can be created manually or by using filters. They are not automatically updated; they can only be changed by deliberate user action.

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

### Accessing the Store Set Management Utility

You can access the Store Set Management utility from the application main menu. Ensure that your user account includes the appropriate roles that are necessary to access the Store Set Management utility.

To access the Store Set Management utility:

- On the **Main Menu**, click **Store Set Management**.

The **Store Set Library** screen appears, with a list of the stores you can access. This library provides a point of access to all the actions on the store sets.

### Store Set Library Grid

The following table describes the fields that appear on the Store Set Library grid:

**Table 3–1** *Fields that appear on the Store Set Library Grid*

Field	Description
Name	Name of the store set.
# Subsets	Number of subsets assigned to the store set.
Created By	User ID of the user who created the store set.
Date Created	Date when the user created the store set.
Last Used	Date when the store set was last accessed by an user.
Type	Type of the store set (Static or Dynamic).

## Working with the Store Set Management User Interface

The Store Set Management user interface enables you to add, modify, or remove store sets, as also the associated stores or subsets. It also enables you to manage the subsets in a store set.

This section describes how you can effectively use the Store Set Management user interface to manage store sets and subsets. It includes the following tasks:

- [Creating New Store Sets](#)
- [Copying the Selected Store Set](#)
- [Renaming the Selected Store Sets](#)
- [Merging the Selected Store Sets](#)
- [Removing the Selected Store Sets](#)
- [Viewing Other Store Sets](#)
- [Printing and Exporting the Store Set Information](#)
- [Sorting the User Account Information](#)
- [Customizing the Columns](#)
- [Finding Stores](#)

### Creating New Store Sets

Use the *New Store Set* feature to create new store sets. You can create new store sets to customize the store sets that you use.

To create new store sets:

1. On the **Main Menu**, click **Store Set Management**.

The **Store Set Library** screen appears.

2. From the **Action** list, select **New Store Set**, and then click **Apply**.

A new store set named *NewStoreSet* is created and added to the **Store Set Library**.

For information on renaming the store set, see [Renaming the Selected Store Sets](#).

## Copying the Selected Store Set

You can copy a store set to create a foundation for building a new store set.

You can add subsets to the copied store set, or remove stores from the subset to create a new store set, defined by setting filters in the **Filters** tab.

To copy a selected store set:

1. On the **Main Menu**, click **Store Set Management**.  
The **Store Set Library** screen appears
2. Select the check box next to the store set you want.
3. From the **Action** list, select **Copy Selected Store Set**, and then click **Apply**.

---

---

**Note:** You can copy only one store set at a time.

---

---

A new store set named *Copy of store\_set\_name* is created and added to the **Store Set Library** screen.

For information on renaming the new store set, see [Renaming the Selected Store Sets](#).

## Renaming the Selected Store Sets

Use the *Rename Selected Store Set* feature to change the name of a store set.

To rename a selected store set:

1. On the **Main Menu**, click **Store Set Management**.  
The **Store Set Library** screen appears.
2. Select the check box next to the store set you want.
3. From the **Action** 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 **Rename**.

---

---

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

---

---

## Merging the Selected Store Sets

You can combine two existing store sets to create a new store set. The merged store sets continue to exist independently. You can merge only two store sets at a time.

---

---

**Note:** Merged stores sets are Static store sets.

---

---

To merge two existing store sets:

1. On the **Main Menu**, click **Store Set Management**.  
The **Store Set Library** screen appears.
2. Select the check boxes next to the two store sets you want to merge.
3. From the **Action** list, select **Merge Selected Store Sets**, and click **Apply**.

The selected store sets are merged and displayed on the **Store Set Library** screen, with the name *Store\_Set\_Name\_1-Store\_Set\_Name\_2*.

For information on how to rename the new store set, see [Renaming the Selected Store Sets](#).

To merge another store set with the merged store sets, repeat steps 2 and 3.

---

---

**Note:** Only two store sets can be merged at a time.

---

---

## Removing the Selected Store Sets

Use the *Remove Selected Store Sets* feature to remove a store set from the database. Once removed, you cannot retrieve that store set.

---

---

**Note:** The store sets created by a user can be deleted or removed from the application only by that user. The administrative also cannot remove the store sets created by another user.

---

---

To remove the selected store set:

1. On the **Main Menu**, click **Store Set Management**.  
The **Store Set Library** screen appears.
2. Select the check box next to the store set you want.
3. From the **Action** list, select **Remove Selected Store Set**, and click **Apply**.

The store set is deleted from the database.

## Viewing Other Store Sets

Use the *View Other Store Sets* feature to view all the store sets created by other users in the application. You can also search and add other store sets into your user login.

---

---

**Note:** You can view all the store sets in the database. However, you cannot delete or modify any of the store sets created by the other users.

---

---

To view the other store sets:

1. On the **Main Menu**, click **Store Set Management**.

The **Store Set Library** screen appears.

2. From the **Action** list, select **View Other Store Sets**, and click **Apply**.

The **View Other Store Sets** screen appears.

3. Enter the user name in the **User Name** field

Or

Enter the store set name in the **Store Set Name** field.

---

**Note:** You can enter the user name and the store set name to find the store set.

---

4. Click **Find**.

5. The store set(s) that match your search criteria are displayed in the list.

The store set(s) appear in the library with the name of the user who created the store set, the store set ID, the date when it was created, the date when it was last used, and the type of store set.

You can add this store set in the **Store Set Library** by clicking on **Add Store Sets** button on the top panel. The following figure shows the **View Other Store Sets** window with the search results.

**Figure 3–1 View Other Store Sets Screen**

The screenshot shows the Oracle Store Set Library interface. At the top, there's a blue header with the Oracle logo and the breadcrumb 'Store Set Library > View Other Store Sets'. Below the header, there's a section titled 'View Other Store Sets' with two input fields: 'User Name:' and 'Store Set Name:', each followed by a text box. To the right of these fields is a 'Find' button. Above the 'Find' button are two more buttons: 'Add Store Sets' and 'Cancel'. Below the search fields, there's a yellow banner that says 'Choose one or two store sets to include in your store base:'. Underneath this banner is a table with the following data:

<input checked="" type="checkbox"/>	id	Name	# Subsets	Created By	Date Created	Last Used	Type
<input checked="" type="checkbox"/>	221	Jack	2	vinod	07/25/2006	07/25/2006	Static

To add the store set to the Store Set Library:

1. Select the check box next to the store set that you want to add to your **Store Set Library**.
2. Click **Add Store Sets** on the top panel of the screen.

## Printing and Exporting the Store Set Information

Use the *Print or Export* feature to print or export the information that appears on the Store Set Library grid. When you print or export the information:

- Only the visible columns are printed or exported. For example, if you choose to hide some columns (see [Customizing the Columns](#)), the data in those columns are excluded in the output.
- The information is printed or exported in the current sort order. (To change the sort order, see [Sorting the User Account Information](#).)

---

**Note:** You can export the information in the Microsoft Excel (.xls) format.

---

To print or export the store set information:

1. From the **Action** list on the screen you want, select **Print or Export**, and then click **Apply**.

The **Print or Export** dialog box appears with a reminder that only the visible data (not the data in the hidden columns) will be printed or exported. The dialog box also includes a count of the rows and the columns. This can help you decide how long the print or export process will take.

2. Do one of the following:

**Table 3–2** *Printing and Exporting User Account Information*

To	Do This
Print the user data on the screen (not the screen itself)	<ol style="list-style-type: none"> <li>1. Click <b>Print</b>.</li> <li>2. Enter the appropriate print parameters in the <b>Print</b> dialog box that appears.</li> </ol>
Export the data to a Microsoft Excel spreadsheet	<ol style="list-style-type: none"> <li>1. Click <b>Send to Excel</b>. The <b>Save As</b> dialog box appears.</li> <li>2. Type a file name, and click <b>Save</b>. An Export Complete message appears along with the path and file name of the file, and the Microsoft Excel file opens.</li> </ol>

## Sorting the User Account Information

Use the *Sort Table* feature to sort the store set information that appears on the Store Set Library grid.

To sort the store set information:

1. From the **Action** list, select **Sort Table**, and click **Apply**.  
The **Customize Table** dialog box appears.
2. On the **Sort Table** tab, enter a sort criteria in the following manner:
  - 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 a descending order (Z - A or 10 - 1).
  - c. If you want 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 sort criteria, click **\*Select\*** from the list boxes.

---

- When the list boxes and sort order reflect the way you want the data to be sorted, click **Done**.

## Customizing the Columns

Use the *Modify Columns* feature to customize (rearrange or hide) the columns that appear on the Store Set Library grid.

To customize the columns:

- From the **Action** list, select **Modify Columns**, and click **Apply**.  
The **Customize Table** dialog box appears.
- On the **Change Columns** tab, do one of the following:

**Table 3–3 Customizing Columns**

To	Do this
Hide a column	<ol style="list-style-type: none"> <li>In the <b>Visible Columns</b> list, select the column that you want to hide.</li> <li>Click the left arrow to move the column to the <b>Hidden Columns</b> list.</li> </ol>
Show a hidden column	<ol style="list-style-type: none"> <li>In the <b>Hidden Columns</b> list, select the column that you want to make visible.</li> <li>Click the right arrow to move the column to the <b>Visible Columns</b> list.</li> </ol>
Change the column order	<ol style="list-style-type: none"> <li>In the <b>Visible Columns</b> list, select the column whose position you want to change.</li> <li>Click the up or down arrow until the column is in its target location.</li> </ol>

- When the **Customize Table** dialog box reflects your settings, click **Done**.

## Finding Stores

You can search for a specific store in the application by using the **Stores** tab on the **Store Set** screen.

To find a store:

- On the **Main Menu**, click **Store Set Management**.  
The **Store Set Library** screen appears.
- Select the store set in which you want to search for the store.  
The **Store Set** screen appears with three tabs - **Subsets** (default), **Filters**, and **Stores**.
- Select the **Stores** tab.
- From the **Action** 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 is displayed in color red at the top of the list.

## Managing Subsets

A subset is a group of stores, grouped because of a similar attribute or characteristic. There can be many stores in a subset and multiple subsets assigned to a store set.

This section describes how you can effectively manage subsets. It includes the following tasks:

- [Creating a New Subset](#)
- [Adding Stores to a Subset](#)
- [Renaming the Selected Subsets](#)
- [Combining the Selected Subsets](#)
- [Removing the Selected Subsets](#)
- [Changing the Store Set Type to Static](#)
- [Filtering the Subsets](#)
- [Customizing the Table](#)
- [Printing or Exporting Information](#)

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**Note:** As a common user, the functionality of using **Store Set Management** is limited. You can only customize a table and print or export information.

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### Creating a New Subset

Use the *New Subset* feature to create a new subset in a store set with different stores.

To create a new subset:

1. On the **Main Menu**, click **Store Set Management**.

The **Store Set Library** screen appears.

2. Select the store set in which you want to add a new subset.

The **Store Set** screen appears, with three tabs—**Subsets** (default), **Filters**, and **Stores**.

3. From the **Action** list, select **New Subset**, and click **Apply**.

The new subset is displayed in the grid with the name *New SubSet*. If you have already created a subset with that name, the new subset gets named as *New SubSet1*. You can change the name of the subset to an appropriate name. For information on how to change the name of the subset, see [Renaming the Selected Subsets](#).

## Adding Stores to a Subset

To add or replace the stores in a store subset:

1. On the **Main Menu**, click **Store Set Management**.  
The **Store Set Library** screen appears.
2. Select the store set to which you want to add the stores.  
The **Store Set** screen appears, with three tabs: **Subsets** (default), **Filters**, and **Stores**.
3. On the **Subsets** tab, select the check box next to the subset you want.
4. In the text box to the right, enter the store IDs of the stores.
5. Click **Add stores to Selected Subset**.
6. If you want to replace the existing stores in the subset, select the **Replace Existing Stores** check box.
7. When finished, click **Done**.

## Renaming the Selected Subsets

Use the *Rename Selected Subsets* feature to change the name of a newly added or an existing subset to an appropriate name.

To rename a selected subset:

1. On the **Main Menu**, click **Store Set Management**.  
The **Store Set Library** screen appears.
2. Select the store set that contains the subset you want.  
The **Store Set** screen appears, with three tabs: **Subsets** (default), **Filters**, and **Stores**.
3. On the **Subsets** tab, select the subset you want.
4. From the **Action** list, select **Rename Selected Subsets**, and click **Apply**.  
The **Rename Subsets** window appears.
5. Enter the new subset name in the **Rename Subset** field, and click **Rename subset**.

## Combining the Selected Subsets

You can combine two or more existing subsets that belong to one store set.

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**Note:** You can combine only two subsets at a time.

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To combine two selected subsets:

1. On the **Main Menu**, click **Store Set Management**.  
The **Store Set Library** screen appears.
2. Click the store set name and select the store set, which contains the two subsets you want to combine.  
The **Store Set** screen appears, with three tabs: **Subset** (default), **Filters**, and **Stores**.

3. Select the two subsets that you want to combine by selecting the check box next to the two subsets.
4. Click **Apply**.  
A confirmation message appears. When you combine two subsets, the store set is made static.
5. Click **OK**.  
The new subset is displayed on the grid, with the new name being a combination of the names of the two subsets.

## Removing the Selected Subsets

Use the *Remove Selected Subsets* feature to remove subsets from the store set. Once removed, you cannot retrieve any information on the subset.

To remove selected subsets from a store set:

1. On the **Main Menu**, click **Store Set Management**.  
The **Store Set Library** screen appears.
2. Select the store set that contains the subset you want.  
The **Store Set** screen appears, with three tabs: **Subsets** (default), **Filters**, and **Stores**.
3. Select the subset that you want to remove, and then click **Apply**.  
A confirmation message appears.
4. Click **OK**.

## Changing the Store Set Type to Static

To change the store set type to Static:

1. On the **Main Menu**, click **Store Set Management**.  
The **Store Set Library** screen 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.

## Filtering the Subsets

You can create Dynamic store sets by using the **Filters** tab in the **Store Set** window. Dynamic store sets are created and maintained by using filters and are automatically updated whenever they are being used, as the filters are re-applied or as the attributes change.

Use the **Filters** tab to create and delete filters. Filtering the subsets will enable you to move stores from one subset to another, based on the filter that you create and apply.

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**Note:** To effectively use the Filter feature, you must have at least two subsets in a store set.

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To create a new filter:

1. From the **Store Set Library**, select a store set with at least two subsets.
2. Select the store set for which you want to create the filters.  
The **Store Set** screen appears with three tabs - **Subsets**, **Filters**, and **Stores**.
3. Select the **Filters** tab.  
The **Filters** tab appears.
4. From the **If this is true:** field values, select a field value that you want to use as a filter.
5. From the **Operator** list, select the operator that is associated with the column field value:
  - 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, appropriate to the filter that you have chosen.
7. Click **Add**.
8. Click **Apply Filter**.
9. If the filter returns acceptable results, click **Done** to save the filter and exit.

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 **Reorder Subsets**.  
The **Reorder Store Sets** window appears.
2. Select the subset that you want to move, and use the up or down arrows to change its position.
3. Click **Reorder Subsets**.

## Customizing the Table

You can change the display of the subsets listed within the **Store Set** screen by using the **Customize Table** option. For information on how to customize a table, see [Sorting the User Account Information](#) and [Customizing the Columns](#).

## Printing or Exporting Information

You can print the information displayed on the screen or export the information to a Microsoft Excel spreadsheet. For information on how to print or export data, see [Printing and Exporting the Store Set Information](#).



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## Managing Reports

The Merchant Desktop reporting system uses the MicroStrategy Web Universal platform, and enables you to create reports required by your business. Users can then copy the reports you create, modify them, and save them to their own directories.

This chapter includes the following sections:

- [Accessing the Reports](#)
- [Creating Reports](#)
- [Post-Installation Configuration](#)
- [Merchant Desktop Administration](#)
- [Personalizing Merchant Desktop](#)

Your access to MicroStrategy Web Universal is seamless. Once you log on to Merchant Desktop, you are logged on to MicroStrategy Web Universal platform.

When you access reports or graphs, click the MicroStrategy help icon for information on how to subscribe to reports, customize and save reports, and so on.

### Accessing the Reports

Merchant Desktop provides you with the following ways to access the 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.

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**Note:** 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.

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To create reports:

1. Click the Reporting tab.

The Reporting screen appears with MicroStrategy Web Universal options.

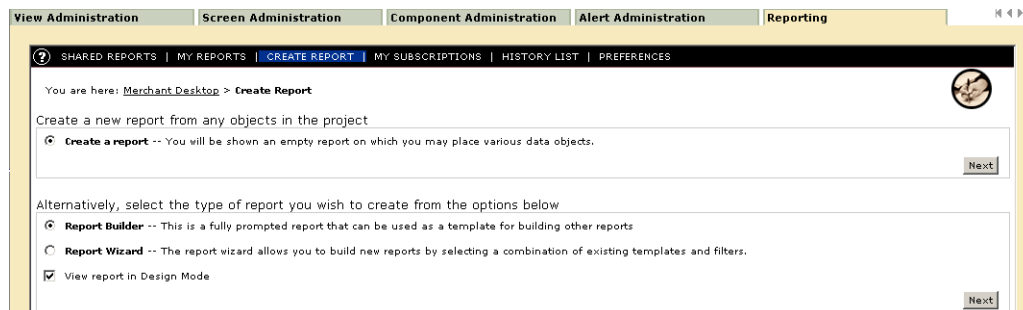
**Figure 4–1 Reporting Screen**



2. Click the Create Reports icon.

The MicroStrategy Web Universal Create Report screen appears.

**Figure 4–2 Create Reports Screen**



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:

- a. 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.
  - b. 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
  - c. To remove any attribute or metric that you have added to the report, right click it and select Remove From Grid.
  - d. 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.

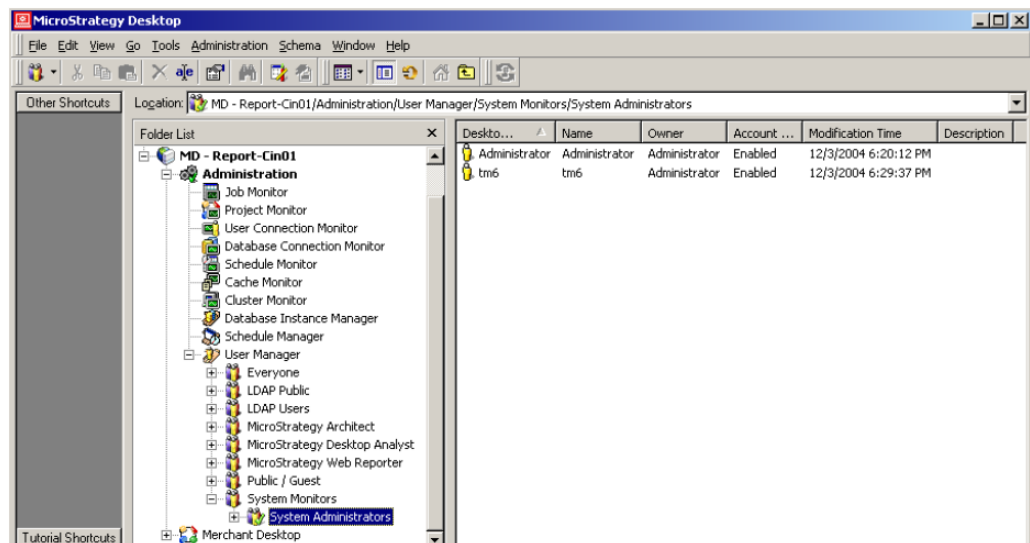
## Post-Installation Configuration

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.

**Figure 4–3 MicroStrategy Desktop Screen**



2. Copy a user with the role of MD\_ADMINISTRATOR from the Everyone group to the System Administrators group.

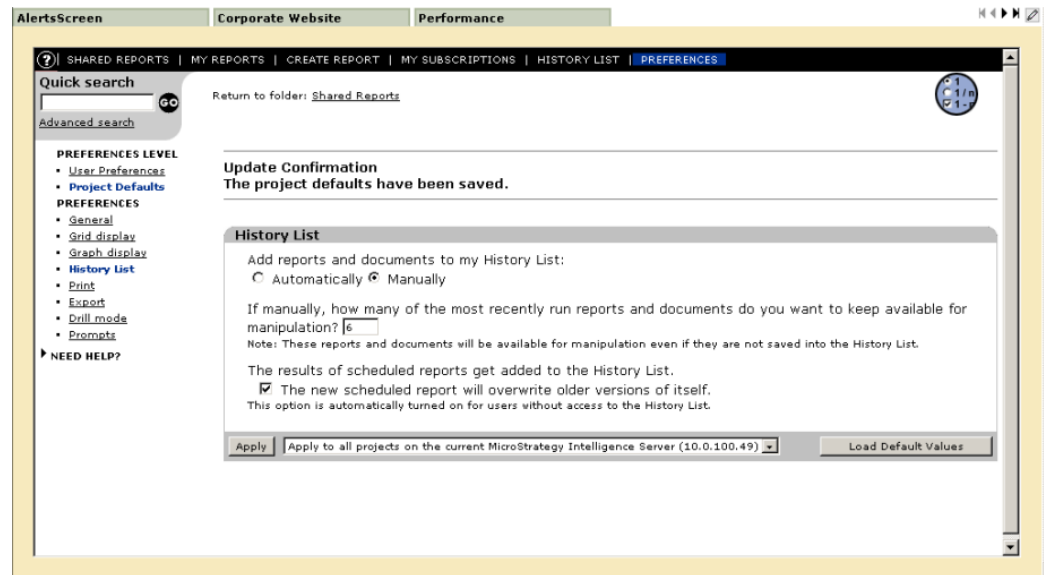
3. Open a new browser window, type in the Merchant Desktop URL, and log in as the user you just copied in the MicroStrategy Desktop.

The following screen appears:

**Figure 4–4 Merchant Desktop Screen**

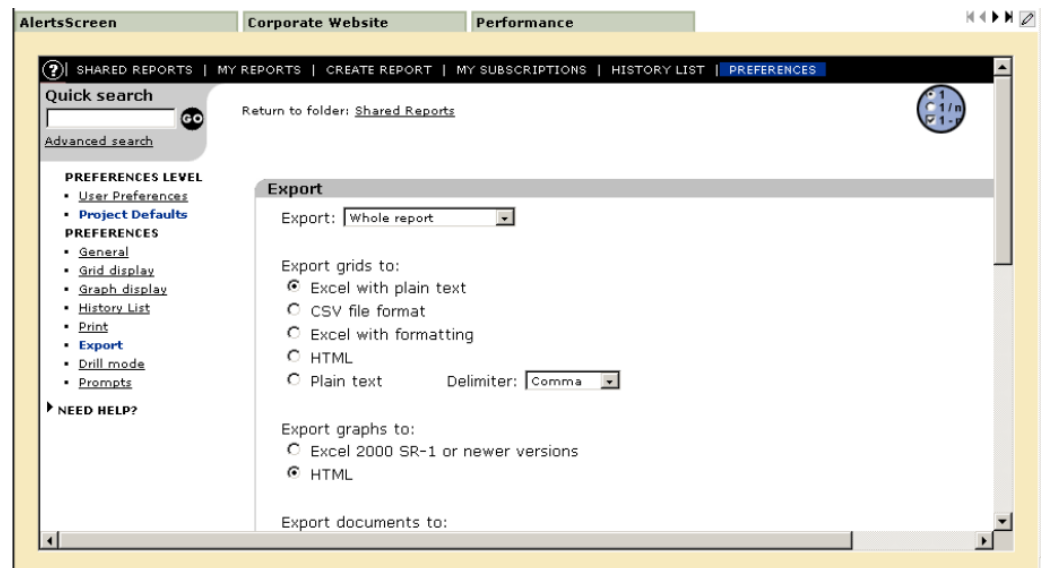


4. Click the Preferences button or link.
5. On the left-hand side of the screen, locate the Preferences Level menu and then click the Project Defaults option.
6. Still on the left-hand side of the screen, locate the Preferences menu and then click the History List option.
7. Make sure the Manually option 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.

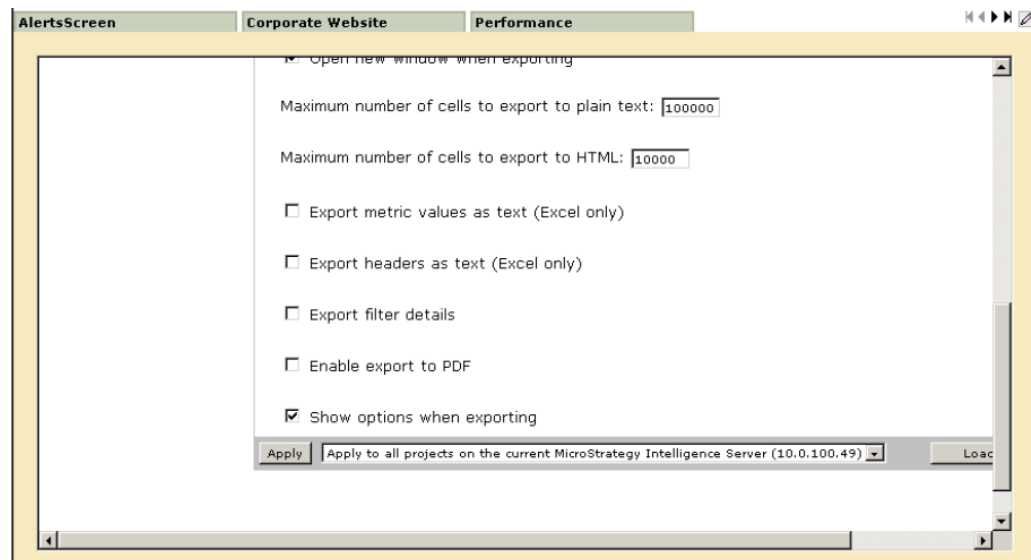
**Figure 4–5 Merchant Desktop - Update Confirmation Screen**

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.

**Figure 4–6 Merchant Desktop - Export Screen**

10. Scroll down to the bottom of the screen and uncheck the Enable export to PDF option, as in the example below.

**Figure 4–7 Enable export to PDF Option**

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

Following is a high-level list of Merchant Desktop administration tasks. You can perform these tasks after a successful installation of Merchant Desktop.

- Managing user accounts - Depending on your implementation of Merchant Desktop and Price, the user accounts may already be created for you by Oracle Retail 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 E-mail address or something else, see [Updating the "Unassigned View" Message](#).
- 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](#) to understand the effect of updates you make.
- 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.

- Managing desktops - This task involves making sure end user browsers are set up correctly. See the [Checking Your Merchant Desktop Browser Settings](#) in the [Plan User's Guide](#). 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](#). 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](#).
- Start from scratch and create all of your own components, screens, and views. See [Creating and Deploying Views and Their Elements](#).

## 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:

../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.

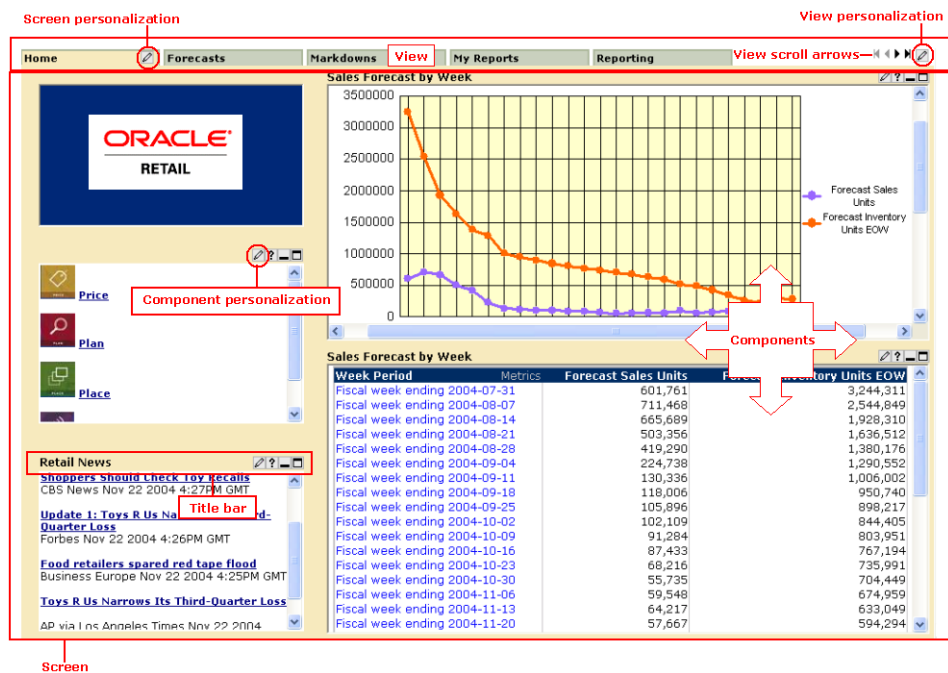
The new HTML is available as soon as the file is copied.

## 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.

Below is a sample view that would be deployed to a user. It has five screens (Home, Forecasts, Markdowns, My Reports, and Reporting), and the Home screen has five components. The pencil buttons indicate that this view is for a power user.

**Figure 4–8 Merchant Desktop Screen Components**

## Good Practices

- Copy the Sample Views, Screens, or Components
- Lock Views, Screens, or Components until You Are Ready to Share Them
- Test Your Views, Screens, or Components with Test User Accounts

### 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 [Creating a User Account](#).
- To assign a view to a test user account, see [Assigning a View to a User](#).

## 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 4-1 Understanding Updates**

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"> <li>■ Updates to the changed screen, such as switching component positions or replacing components</li> <li>■ 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.</li> </ul> <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.

## 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 [Creating a User Account](#).
2. Assign a sample view to one of the user accounts you just created. See [Assigning a View to a User](#).

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](#)
  - [Adding Screens to a View](#)
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:
  - a. Switch to the browser window where you are logged on as an administrator.
  - b. Make the change(s).
  - c. Switch back to the test user account browser window.
  - d. Click the changed view, screen, or component to see the change.

---

**Note:** 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.

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9. When you are satisfied with the view, assign it to users as explained in [Assigning a View to a User](#).

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](#) 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.

1. Create one or more components. See [Creating a Component](#).
2. Create one or more screens. See [Creating a Screen](#).
3. Add one or more components to each screen. See [Adding Components to a Screen](#).
4. Create one or more views. See [Creating a View](#).
5. Add one or more screens to each view. See [Adding Screens to a View](#).
6. Assign each view to one or more users. See [Assigning a View to a User](#).

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.

When the Create Component screen reflects the setting you want, click the Save button.

The Component Administration screen appears, and the new component appears in alphabetical order in the ID column.

## 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 (see on page 4-11), and click the Save button.

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.

## 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](#) 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 except for the Alert component. You can add only one Alert component per screen.
- 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.

## 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 screen 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 the Save button.

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.

## 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.

## 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.

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**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.

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- 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.

## 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
- 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.

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**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 4–2 Screen Types**

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.
Performance	<p>The Performance screen is a special screen type that consists of the <a href="#">Filter Component</a>.</p> <p>The Filter component provides the merchandise, location, and time hierarchies by which you can dynamically update special reports and graphs. (You must create a series of filters for any reports or graphs that you want to interact with the Filter component.)</p> <p>The Filtered Report and Filtered Graph components are designed to display the special reports and graphs and to interact with the merchandise, location, and period trees provided by the Filter component.</p> <p>For each Performance screen, you can select a variety of pre-defined screen layouts, and you add any component. For example, even though only the Filtered Report and Filtered Graph components interact with the Filtered component, you might want to add a web site or news feed to the Performance screen.</p>
Top/Bottom	<p>The Top/Bottom screen type provides a quick and easy way for users to access the top or bottom n percent of a variety of metrics. For example, you could select to view the bottom 20% of styles (from the merchandise hierarchy) by GM % across sales to date (STD) for Department N.</p> <p>The Top/Bottom screen consists of four filter prompts (merchandise level, ranking, merchandise grouping, and time). After users have made a selection for each filter, they click the Execute Report button.</p> <p>You cannot customize the Top/Bottom screen except for its display name and description.</p>
Reporting	<p>The Reporting screen provides access to the MicroStrategy Web Universal application and to the reports and graphs that have been supplied with Oracle Retail Price, Plan, Place, or Promote products or that you have created.</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).

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**Note:** 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.

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**Table 4–3 Select Layout**

Layout name	Representation	Type							
Layout 1	<table><tr><td>1</td><td>4</td><td>5</td></tr><tr><td>2</td><td colspan="2" rowspan="2">6</td></tr><tr><td>3</td></tr></table>	1	4	5	2	6		3	Fixed layout
1	4	5							
2	6								
3									
Layout 1 Inverted	<table><tr><td>1</td><td>2</td><td>4</td></tr><tr><td colspan="2" rowspan="2">3</td><td>5</td></tr><tr><td>6</td></tr></table>	1	2	4	3		5	6	Fixed layout
1	2	4							
3		5							
		6							
Layout 2	<table><tr><td>1</td><td rowspan="4">5</td></tr><tr><td>2</td></tr><tr><td>3</td></tr><tr><td>4</td></tr></table>	1	5	2	3	4	Fixed layout Note: Cell 1 is 16% high, Cell 2 is 17% high, and Cells 3 and 4 are 33% high.		
1	5								
2									
3									
4									
Layout 2 Inverted	<table><tr><td rowspan="4">1</td><td>2</td></tr><tr><td>3</td></tr><tr><td>4</td></tr><tr><td>5</td></tr></table>	1	2	3	4	5	Fixed layout Note: Cell 2 is 16% high, Cell 3 is 17% high, and Cells 4 and 5 are 33% high.		
1	2								
	3								
	4								
	5								
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" rowspan="2">4</td></tr><tr><td>2</td></tr><tr><td>3</td><td>5</td><td>6</td></tr></table>	1	4		2	3	5	6	Fixed layout
1	4								
2									
3	5	6							
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								

**Table 4–3 (Cont.) Select Layout**

Layout name	Representation	Type									
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											
One Column	<table><tr><td>1</td></tr><tr><td>2</td></tr><tr><td>...</td></tr></table>	1	2	...	Open layout You can add as many rows as necessary, limited only by the memory available on your computer.						
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	...	...	Open layout You can add as many rows as necessary, limited only by the memory available on your computer.			
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	...	...	...	Open layout You can add as many rows as necessary, limited only by the memory available on your computer.
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.
- 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.

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---

**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.

---

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**Table 4–4 Available Components list box and screen layout**

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"> <li>■ To remove a component, click the X in the upper-right corner of that component’s cell</li> <li>■ To add a component, click it in the list box on the left and drag it to its target location</li> </ul>
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>
Edit the component	<p>Click the pencil button and complete the resulting component screen. Note the following:</p> <ul style="list-style-type: none"> <li>■ 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.</li> <li>■ 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.</li> </ul>

## 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 Oracle Retail product suite and to whom you can assign the view.

An \* (asterisk) preceding the user name indicates that the 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, e.g., Oracle RetailBlue.

### 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.

### 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, e.g., Oracle RetailBlue.

**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.

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---

**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](#) screen.

**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.

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**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.

#### Display Name:

Optional. This text appears in the title bar of the component.

- The display name 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.

#### Description:

Optional. This text is for internal use only. Use it to type any information that would help you to identify this component 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:** The ID, display name, and description appear on administration screens to help you distinguish between the different components that you create. They also appear on user screens.

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#### Padding Width:

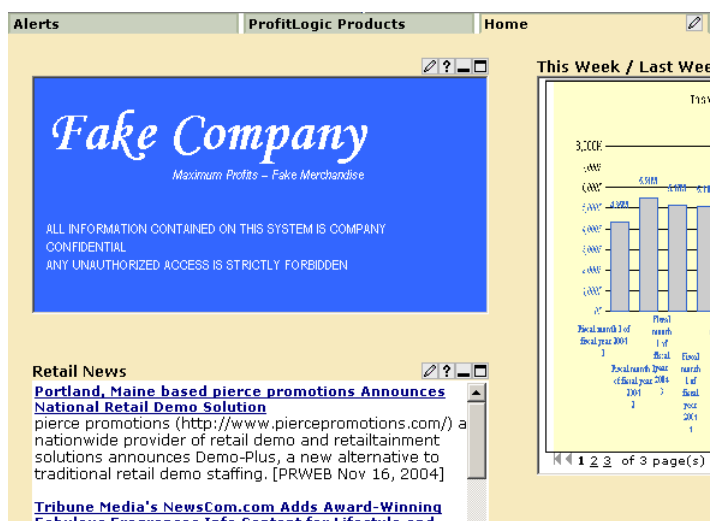
This option determines the amount of padding (spacing) around each component, and thus, in combination with the other components, the amount of spacing between components.

Select one of the options described in the following table. An example of the Thin and Thick options appears after the table.

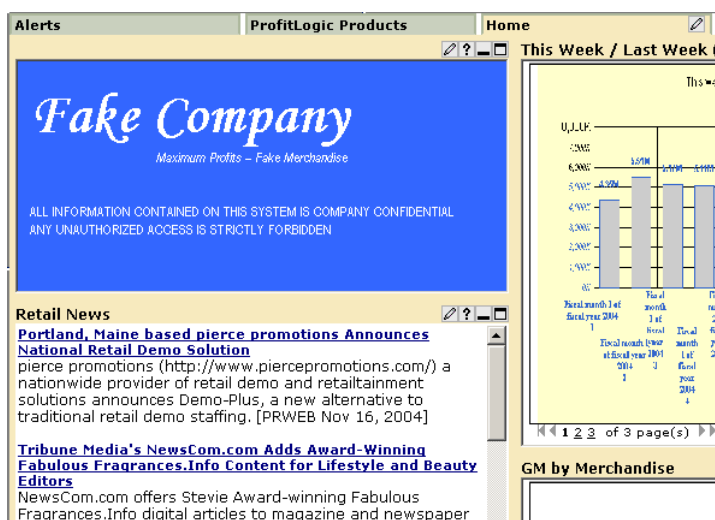
**Table 4–5 Padding Width Options**

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.

**Figure 4–9 Padding Width – Thick Option**



**Figure 4–10 Padding Width – Thin Option**



### 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:**

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 4–6    Component Types**

<b>Component</b>	<b>Description</b>
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.
Product Links	Provides links to Oracle Retail products such as Price, Plan, Place, and Promote
Filtered Graph	Displays a single graph that will update dynamically based on merchandise, location, and period hierarchy selections from the Filter component
Graph	Displays a single graph or chart. Several graphs are supplied with Merchant Desktop. For a list of the available graphs, see <a href="#">Graph Component</a> .
Filtered Report	Displays a single report that will update dynamically based on merchandise, location, and period hierarchy selections from the Filter component
Report	Displays a single report. You can select any of the reports supplied with Merchant desktop, or any reports 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.

### **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 the 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**

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 Oracle Retail products, news feeds, web sites, and a variety of reports and graphs.

Following is an example of a view.

**Figure 4–11 Unassigned View**

## Alerts Component

For information on the parameters that are common to all components, see [Parameters Common to All Component Screens](#).

### Alert Filter:

Select the default filter that will determine the display of alerts on the users alerts component window.

**Table 4–7 Alert Filter**

Filter	Description
Show Open	Displays the alerts for which users have not yet taken an action (such as updating an item in a Price worksheet).
Show All	Displays all alerts - open, closed, and hidden.
Hidden	Displays the alerts users previously selected to hide (i.e., because they were not interested in that alert at that time).

- If you select the Allow Personalization check box, users can change this filter as necessary.
- If you clear the Allow Personalization check box, the filter you select here determines the only view of alerts that users can access.

---

**Note:** You can add only one Alerts component to a screen.

---

Visible Rows: Enter the number of rows that you want to constitute a page in the Alerts component window. Users can navigate through the Alerts component by paging up and down, or by clicking links to go directly to the first page or the last page.

- If you are adding the Alerts component to Layout 9 (full screen), adding 200 visible rows is approximately a page at a resolution of 1280 x 1024.
- If you are adding the Alerts component to any of the fixed layouts, adding 4 to 8 visible rows is approximately a page for a height that is 33% of the screen (the smaller the width, the fewer rows you can view at a time because the text within the cells wraps), and adding 12 to 15 rows is approximately a page for a height that is 50% of the screen. Again, these estimates apply to a resolution of 1280 x 1024.

Note that longer alert descriptions and longer hierarchy level names may result in text wrapping, which causes fewer rows to be visible at a time.

## HTML Component

For information on the parameters that are common to all components, see [Parameters Common to All Component Screens](#).

**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](#).

**HTTP Links Component**

For information on the parameters that are common to all components, see [Parameters Common to All Component Screens](#).

**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 in the upper right of the information box.

**Figure 4–12 Link Information Box**

Link:  Allow Personalization ☒

Link Name:  check boxes

Link Description:

Link Image:  ☒

- 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

For information on the parameters that are common to all components, see [Parameters Common to All Component Screens](#).

### 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 4–8 News Feed and Description**

News (RSS) Feed	Description
eMediaWire Retail Industry News	<a href="http://www.emediawire.com/">http://www.emediawire.com/</a> eMediaWire™ is a newswire service of PRWeb™.
PRWeb Retail Industry News	<a href="http://www.prweb.com">http://www.prweb.com</a> 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.
Yahoo Business	<a href="http://news.yahoo.com">http://news.yahoo.com</a> 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 4–9 Display Types**

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.

**Product Links Component**

For information on the parameters that are common to all components, see [Parameters Common to All Component Screens](#).

**Show Description:**

This is the descriptive text that appears beneath each actual product link. This parameter applies to all of the product links in this component.

- Select On to display text beneath all of the product links.

- Select Off to hide the text beneath all of the product links.

**Tool Tip:**

This is the URL that you enter for Link (below). It appears in a yellow box when you hover (hold the mouse pointer over) the link name.

- Select On to display the hover text for all of the product links.
- Select Off to hide (not display) the hover text for all of the product links.

**Show Image:**

This option determines whether or not the product logos appear in the component window.

- Select On to show the product logo for each link you have elected to display (Show option in the link information box, explained next).
- Select Off to hide the product logo for each link you have elected to display (Show option in the link information box, explained next).

**Link Information Box****Link:**

Enter the destination URL of the product exactly as you would if you were entering access the product directly from browser window. You must include the `http://` or `https://`.

Example: `https://yourcompanyname.p4p.companydomain.com`

**Link Name:**

Enter the text that will become the link to the destination URL. In most cases, you will probably enter the name of the product, such as Oracle Retail Price or Oracle Retail Place.

**Link Description:**

Enter the text that appears directly below the link name (if Show Description is set to On). If your users are very familiar with Oracle Retail products, you might want to omit this. Otherwise, you might want to enter text that describes the product or what you can do with it. For example, for a Oracle Retail Price link you might enter something similar to the following:

“Markdown optimization software”

or

“Access to worksheets and pricing groups”

**Show:**

Use this option to determine whether or not the product link information appears in the component window. For example, if Oracle Retail Promote is not installed at your site, select Hide.

- Select Show to make this product link information appear in the component window.
- Select Hide to prohibit this product link information from appearing in the component window.

## Report Component

For information on the parameters that are common to all components, see [Parameters Common to All Component Screens](#).

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.

**Figure 4–13 Selected Report**



### 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

For information on the parameters that are common to all components, see [Parameters Common to All Component Screens](#).

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.

**Figure 4–14 Selected Graph****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.

---

**Filter Component**

The Filter component is a special type of component that is provided for use on the Performance screen type. The Filter component provides the merchandise, location, and period hierarchies by which you can dynamically update specified graphs and reports (typically those on the Performance screen). The graphs and reports that interact with the Filter component are provided by the following components:

- [Filtered Report Component](#)
- [Filtered Graph Component](#)

The only parameters you can change on the Filter component are those that are common to all components, such as title and padding around the component window. For information on these parameters, see [Parameters Common to All Component Screens](#).

**Filtered Report Component**

The Filtered Report component is designed to be used with the [Filter Component](#) on the Performance screen type. It updates dynamically based on selections from the Filter component merchandise, location, and period hierarchies.

For information on the parameters that are common to all components, see [Parameters Common to All Component Screens](#).

The currently selected reported 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.

**Figure 4–15 Selected Report**



#### **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 in the component window.

#### **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 component.

---

**Note:** You cannot close a folder or any of its parent folder if it contains the selected report.

---

#### **Filtered Graph Component**

The Filtered Graph component is designed to interact with the [Filter Component](#) on the Performance screen type. It updates dynamically based on selections from the Filter component merchandise, location, and period hierarchies.

For information on the parameters that are common to all components, see [Parameters Common to All Component Screens](#).

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.

**Figure 4–16 Selected Graph****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 component.

---

**Note:** You cannot close a folder or any of its parent folders if it contains the selected report.

---

**Parameters Common to All Component Screens**

All components provide the following parameters, which affect the title bar, component window padding and height, and which parameters you want users to be able to customize.

**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.

**Display Name:**

Optional. This text appears in the title bar of the component.

- The display name 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.

**Description:**

Optional. This text is for internal use only. Use it to type any information that would help you to identify this component 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.

**Padding Width:**

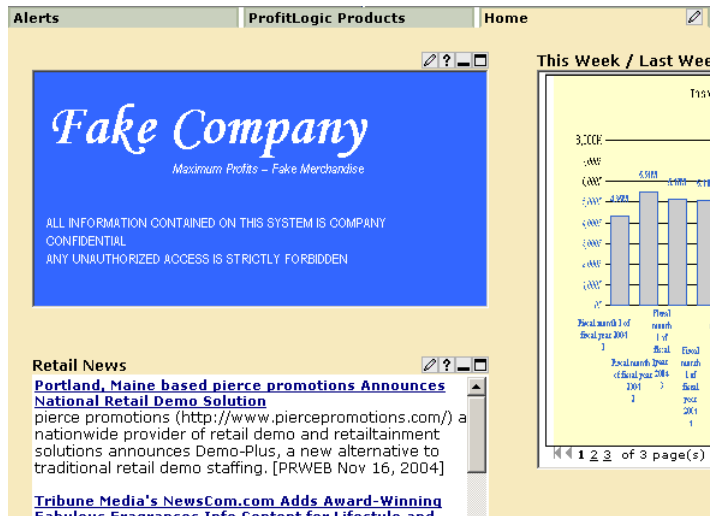
This option determines the amount of padding (spacing) around each component, and thus, in combination with the other components, the amount of spacing between components.

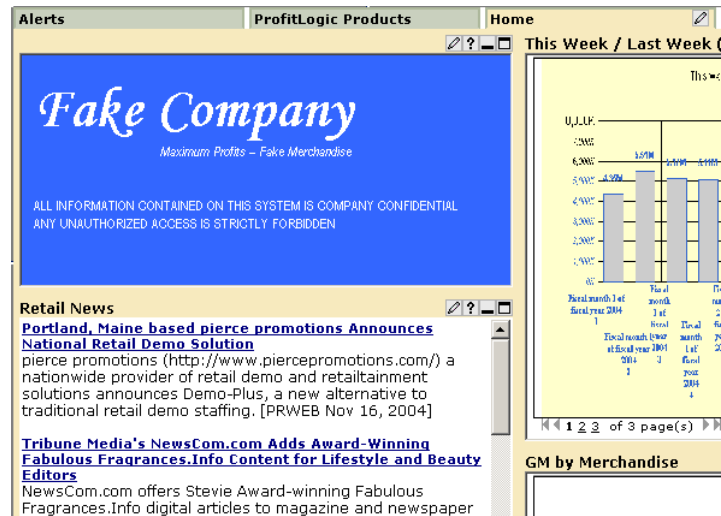
Select one of the options described in the following table. An example of the Thin and Thick options appears after the table.

**Table 4–10** *Padding Width Options*

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.

**Figure 4–17** *Padding Width – Thick Option*



**Figure 4–18 Padding Width – Thin Option****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:**

The title bar is the top row of the component window, which displays the pencil, help, minimize, and maximize buttons.

- Select **Show** to display the title bar.
- Select **Hide** to show only the border of the component window with no title bar.

**Allow Personalization:**

This check box determines whether or not users can change the corresponding parameter value and therefore override your entry.

- If you want users to be able to change this value, select the **Allow Personalization** check box.

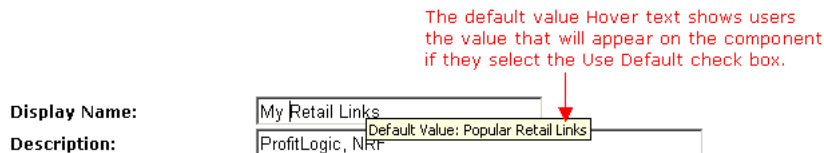
For example, if you want users to be able to change your display name of Popular Retail Links to something else, click the **Allow Personalization** check box. When users click the pencil button to edit the component, the **Display Name** parameter appears with your title as the default text. Users can then enter and save new text. In addition, users can select whether or not they want to receive updates from you for this component:

- If users select the **Use Default** check box for this parameter, they will receive any change you make to that parameter. If you make the change while users

are logged on to Merchant Desktop, the change becomes effective the next time they log on.

- If users clear the Use Default check box for this parameters, they will not receive any updates until they clear the Use Default check box. In part, the Use Default check box acts as a toggle that lets users switch between their entries and your entries. The entries you make as an administrator appear in hover text for each parameter.

**Figure 4–19 Default Hover Text**



- If you do not want users to be able to edit this parameters, clear the Allow Personalization check box.
  - When the Allow Personalization check box is cleared, the corresponding component does not even appear on the component personalization screen; users will not see that parameter.
  - When all of the Allow Personalization check boxes are cleared, the pencil button does not even appear in the component window title bar; users will not be able to access the component personalization screen.

## 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:

**Figure 4–20 User View**



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 4–11    *Personalizing Your View***

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"> <li>■ Screen order determines the order of the tabs from left to right.</li> <li>■ Home screen determines which of those tabs is in the foreground when you log on.</li> </ul> <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:

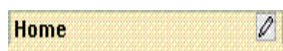
- Screen name - The text that appears on each screen tab and the corresponding personalization screen. Rename a screen when you want different text to appear on the screen tab.
- Screen layout - The order and position of the components
- Components - The number and type of components that appear on the 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:

**Figure 4–21 Personalizing Your Screen**



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 4–12 Personalization Screen Fields**

To	Do this
Change the screen name	Enter new text in the Display Name text box. The text on the screen tab as well as the title bar of the personalization screen update with this text.

**Table 4–12 (Cont.) Personalization Screen Fields**

<b>To</b>	<b>Do this</b>
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"> <li>■ 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</li> <li>■ As you drag the component across the layout, a red outline indicates where you can "stop" or "drop" that component.</li> </ul> <p>A displaced component moves to the open spot left by the moved component</p>
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"> <li>■ To remove a component, click the X in the upper-right corner of that component's cell</li> <li>■ To add a component, click it in the list box on the left and drag it to its target location</li> </ul> <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 4–13** *Screen Types*

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

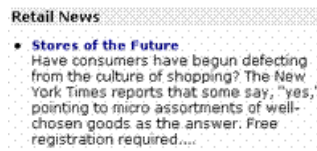
### Component Types

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](#)
- [HTTP Links Component Type](#)
- [HTML Component Type](#)
- [Report Component Type](#)
- [Graph Component Type](#)

### News Feed Component Type

The news component is designed to display retail and other news headlines as RSS (Rich Site Summary or Really Simple Syndication) feeds.

**Figure 4–22 News Feed Component Type**

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 4–14 Messages - News Feed Component**

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.

**Figure 4–23 HTTP Links Component Type**

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.

**Figure 4–24 HTML Component Type**



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.

**Figure 4–25 Report Component Type**



While the Reporting screen (see "[Screen Types](#)") 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](#)").

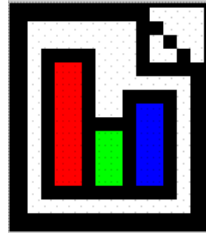
Note: This section describes the function of the Report component, not its contents. If you are unsure about the contents, see the administrator.

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.

**Figure 4–26 Graph Component Type**

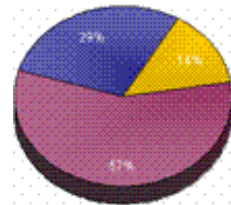


While the Reporting screen (see "[Screen Types](#)") provides access to all graphs and reports, you may want to set up a component for a specific graph that you have customized. For that case, Merchant Desktop provides you with this Graph component (as well as a "[Report Component Type](#)").

## Pie Charts

MicroStrategy comes with the ability to create Pie charts and display them through the Merchant Desktop.

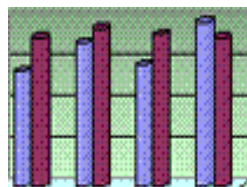
**Figure 4–27 Pie Charts**



## Bar and Line Charts

MicroStrategy comes with the ability to create line and Bar Charts that may be displayed through the Merchant Desktop.

**Figure 4–28 Bar and Line Charts**



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.

## Troubleshooting

Following are problems and solutions for the Merchant Desktop feature.

**Table 4–15 Troubleshooting for Merchant Desktop**

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.	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.  If the Use Default check box does not appear on your screens, the administrator has turned that option off.
The administrator made some changes to the view, screens, or components, but I didn't receive the changes.	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.  If the check boxes are selected, try quitting all of the open browser windows and then logging in to Merchant Desktop again.
I hid the title bar on a component. How do I get it back?	If the pencil button is not available, you must ask an administrator to do this for you.  To show a hidden title bar: <ol style="list-style-type: none"> <li>1. For the screen that contains the component with the hidden title bar, click the screen tab and corresponding pencil button.</li> <li>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.</li> <li>3. On the component personalization screen, select the Show option and click the Save button.</li> <li>4. On the Screen Personalization screen, make any other changes necessary and then click the Save button.</li> </ol> <p>The screen appears, and the title bar is back on the component window.</p>

**Table 4–15 (Cont.) Troubleshooting for Merchant Desktop**

<b>Problem</b>	<b>Solution</b>
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.
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.	This can occur in the following circumstances: <ul style="list-style-type: none"> <li>■ The MicroStrategy Intelligence Server and Web Universal application are not available.</li> <li>■ The password you are using is invalid, or your user name and password are not in the MicroStrategy users database.</li> </ul> In both of these cases, notify the administrator.
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.	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.  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.
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.

**Table 4–15 (Cont.) Troubleshooting for Merchant Desktop**

<b>Problem</b>	<b>Solution</b>
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.
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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# Index

## A

---

about  
    store sets, 3-1  
    subsets, 3-1  
accessing reports, 4-2  
adding  
    screens to views, 4-46  
    tabs to view, 4-46  
alert component  
    limit of one per screen, 4-12  
assign view screen, 4-24  
assigning  
    components to screens (administrators), 4-12  
    screens to views (administrators), 4-13  
    users to views (administrators), 4-13

## B

---

business rule history screen, 2-10  
business rule management  
    browsing hierarchies, 2-4  
    copy rule settings, 2-9  
    expand hierarchies, 2-5  
    filters panel, 2-3  
    find hierarchy entity, 2-6  
    grid panel, 2-4  
    modify rule settings, 2-8  
    remove rule settings, 2-9  
    user interface, 2-3  
    view rule modification history, 2-10  
business rule settings  
    copy, 2-9  
    modify, 2-8  
    remove, 2-9  
business rules  
    about, 2-1

## C

---

changing colors (see changing skins)  
changing skins, 4-46  
color schemes (see skins)  
colors, changing (see skins)  
component administration screen, 4-27  
components

    assigning to screens (administrators), 4-12  
    changing colors (see changing skins)  
    composed of, 4-50  
    creating (administrators), 4-11  
    customizing, 4-49  
    defined, 4-50  
    HTTP links, 4-51  
    links to web sites, 4-51  
    list of types, 4-50  
    news feed, 4-51  
    placement related to screen layout, 4-48  
    renaming, 4-49  
    repositioning, 4-48  
    RSS feeds, 4-51  
copy component screen, 4-32  
copy screen screen, 4-20  
copy view screen, 4-25  
create component screen, 4-29  
create screen screen, 4-16  
create view screen, 4-24  
creating  
    components (administrators), 4-11  
    screens (administrators), 4-11  
    views (administrators), 4-12  
customizing components  
    general procedure, 4-49

## D

---

delete component screen, 4-32  
delete screen screen, 4-22  
delete view screen, 4-27  
drag and drop  
    component positions, 4-48

## E

---

edit screen, 4-20  
edit view screen, 4-26  
error in RSS news feed, 4-51  
Errors  
    The Web Server encountered an unknown runtime error, 4-55  
    This page cannot be displayed, 4-55  
errors  
    error parsing RSS news feed, 4-51

- RSS news feed, 4-51
  - too much data to download, 4-51
- excel
  - exporting user account information, 1-11
- export to pdf (microstrategy administrators), 4-3
- exporting user account information, 1-11

## H

---

- history list (microStrategy administrators), 4-3
- HTTP Links component, 4-51

## L

---

- layouts
  - changing, 4-17
  - list, 4-17
  - maximum number of components, 4-11
- library grid, 3-2
- location hierarchy
  - changing levels of access, 1-7

## M

---

- merchandise hierarchy
  - changing levels of access, 1-7
- microstrategy
  - export to pdf (administrators), 4-3
  - history list (administrators), 4-3
- MicroStrategy screen
  - can't log on, 4-55

## N

---

- news component, 4-51

## P

---

- parsing RSS news feed, 4-51
- passwords
  - case-sensitive, 1-4
  - changing for root user account, 1-4
  - changing for user accounts, 1-7
- printing
  - user account information, 1-11

## R

---

- removing
  - screens from view, 4-46
- renaming
  - components, 4-49
- renaming screens, 4-47
- renaming tabs, 4-47
- reordering
  - screens in view, 4-46
  - tabs in view, 4-46
- Reporting
  - access time is very slow, 4-55
  - MicroStrategy log on screen appears, 4-55
- reporting

- accessing, 4-2
- reporting screen type, 4-16, 4-50
- Reports take a long time to appear, 4-55
- repositioning components, 4-48
- RSS feeds
  - component, 4-51

## S

---

- screen
  - screen administration, 4-14
- Screen Administration screen, 4-14
- screens
  - adding to views, 4-46
  - assign view, 4-24
  - assigning components (administrators), 4-12
  - assigning to views (administrators), 4-13
  - changing colors (see changing skins)
  - component administration, 4-27
  - copy component, 4-32
  - copy screen, 4-20
  - copy view, 4-25
  - create component, 4-29
  - create screen, 4-16
  - create view, 4-24
  - creating (administrators), 4-11
  - delete component, 4-32
  - delete screen, 4-22
  - delete view, 4-27
  - edit screen, 4-20
  - edit view, 4-26
  - layouts and component placement, 4-48
  - removing from view, 4-46
  - renaming, 4-47
  - reordering, 4-46
  - reporting type, 4-16, 4-50
  - setting home screen, 4-46
  - top/bottom type, 4-16
  - view administration, 4-23
- setting home screen, 4-46
- skins
  - changing, 4-46
  - changing on view, 4-45
- spreadsheet
  - exporting user account information, 1-11
- store set information
  - customize columns, 3-7
  - export, 3-6
  - print, 3-6
  - sort, 3-6
- store sets
  - about, 3-1
  - add other store sets, 3-5
  - copy selected, 3-3
  - create, 3-2
  - find, 3-7
  - library grid, 3-2
  - merge, 3-4
  - remove, 3-4
  - rename, 3-3

- view other stores, 3-4
- store sets library grid, 3-2
- store sets management
  - accessing, 3-1
- subsets
  - about, 3-1
  - add stores, 3-9
  - change to static type, 3-10
  - combine, 3-9
  - create, 3-8
  - filter, 3-10
  - remove, 3-10
  - rename, 3-9
- subsets information
  - customize columns, 3-11
  - export, 3-11
  - print, 3-11

## T

---

- tabs
  - adding to views, 4-46
  - removing from view, 4-46
  - renaming, 4-47
  - reordering, 4-46
- This page cannot be displayed, error, 4-55
- top/bottom screen type, 4-16

## U

---

- unassigned view message
  - customizing, 4-7
- user account roles
  - about, 1-1
- user accounts
  - changing assigned hierarchy levels, 1-7
  - changing user name and password, 1-7
  - creating for all Oracle Retail products, 1-5
  - determining product access, 1-6
  - inactivating, 1-8
  - locking, 1-9
  - modifying, 1-7
  - resetting password, 1-9
  - roles, assigning, 1-6
  - roles, changing, 1-7
  - roles, concepts about, 1-2
  - roles, place, 1-3
  - roles, user management, 1-2
  - unlocking, 1-9
- user management
  - assigning roles to user accounts, 1-6
  - changing password for root user account, 1-4
  - creating user accounts, 1-5
  - default user account, 1-3
  - deleting user accounts, 1-8
  - exporting, 1-11
  - hiding columns, 1-11
  - inactivating user accounts, 1-8
  - locking user accounts, 1-9
  - logging on for the first time, 1-3

- modifying user accounts, 1-7
- printing, 1-11
- rearranging columns, 1-10
- removing user accounts, 1-8
- resetting user password, 1-9
- roles for user accounts, 1-2
- root user name, 1-3
- sorting information, 1-10
- starting, 1-3
- unlocking user accounts, 1-9

- users
  - assigning to views (administrators), 4-13
  - receiving unassigned view message, 4-6

## V

---

- view
  - changing skins, 4-45
  - history of rule modifications, 2-10
- view administration, 4-23
- viewing reports, 4-2
- views
  - adding screens, 4-46
  - adding tabs, 4-46
  - assigning screens (administrators), 4-13
  - assigning users (administrators), 4-13
  - changing skins, 4-46
  - creating (administrators), 4-12
  - customizing unassigned view message, 4-7
  - removing screens, 4-46
  - removing tabs, 4-46
  - reordering screens, 4-46
  - reordering tabs, 4-46
  - setting home screen, 4-46

## W

---

- Web Server encountered an unknown runtime error, error, 4-55
- web sites
  - component, 4-51

