

**Oracle® Retail Clearance Optimization Engine**

Administration Guide

Release 14.0

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Oracle® Retail Clearance Optimization Engine Administration Guide, Release 14.0

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- Does the structure of the information help you with your tasks?
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- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

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# Preface

This guide enables you to perform the following administration tasks:

- Managing user accounts
- Managing business rules
- Manage seasonality overrides
- Managing pricing groups

## Audience

This guide is intended for Clearance Optimization Engine 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, the following documents are available in the Oracle Retail Clearance Optimization Engine Release 14.0 documentation set:

- *Oracle Retail Clearance Optimization Engine Configuration Guide*
- *Oracle Retail Clearance Optimization Engine Data Model*
- *Oracle Retail Clearance Optimization Engine Grid Designer User Guide*
- *Oracle Retail Clearance Optimization Engine Grid Designer Online Help*
- *Oracle Retail Clearance Optimization Engine Implementation Guide*
- *Oracle Retail Clearance Optimization Engine Installation Guide*
- *Oracle Retail Clearance Optimization Engine Online Help*
- *Oracle Retail Clearance Optimization Engine Operations Guide*
- *Oracle Retail Clearance Optimization Engine Release Notes*

or in the Oracle Retail Analytic Parameter Calculator Markdown Optimization documentation set:

- *Oracle Retail Analytic Parameter Calculator Markdown Optimization Configuration Guide*
- *Oracle Retail Analytic Parameter Calculator Markdown Optimization Installation Guide*
- *Oracle Retail Analytic Parameter Calculator Markdown Optimization Release Notes*
- *Oracle Retail Analytic Parameter Calculator Markdown Optimization User Guide*

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- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

## Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 14.0) or a later patch release (for example, 14.0.1). If you are installing the base release and additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

## Improved Process for Oracle Retail Documentation Corrections

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This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

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[http://www.oracle.com/technology/documentation/oracle\\_retail.html](http://www.oracle.com/technology/documentation/oracle_retail.html)

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

## Conventions

The following text conventions are used in this document:

<b>Convention</b>	<b>Meaning</b>
<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.
monospace	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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# Getting Started

This chapter provides an orientation to Clearance Optimization Engine (COE) and contains the following sections:

- [About Clearance Optimization Engine](#)
- [Checking Your Browser Settings](#)
- [Logging on to Clearance Optimization Engine](#)

## About Clearance Optimization Engine

The Clearance Optimization Engine (COE) provides the What If RMI interface that Item Planning Configured for COE can access using the RPAS special expression. This allows the IP application to produce in-season price recommendations and forecasts that account for planned promotions and future markdowns in the product life cycle. The forecast includes a sales plan and an optimal price plan.

COE produces its recommendations during the weekly model run. The results of the model run are stored in the database. These results can be extracted using the sendback files. They are then available for use by IP.

Users have the ability to perform real-time What-If scenarios from within Item Planning and alter plans in order to see the results of those changes. The changes include planning a markdown, changing future prices, changing an order, changing the exit date, changing the salvage value, and changing the sell-through target.

Business rules can also be imported from Item Planning into COE in a format that follows the COE standard interface. This load occurs weekly. The following business rules listed in [Table 1-1, "Business Rule Mapping Between COE and Item Planning"](#), can be imported.

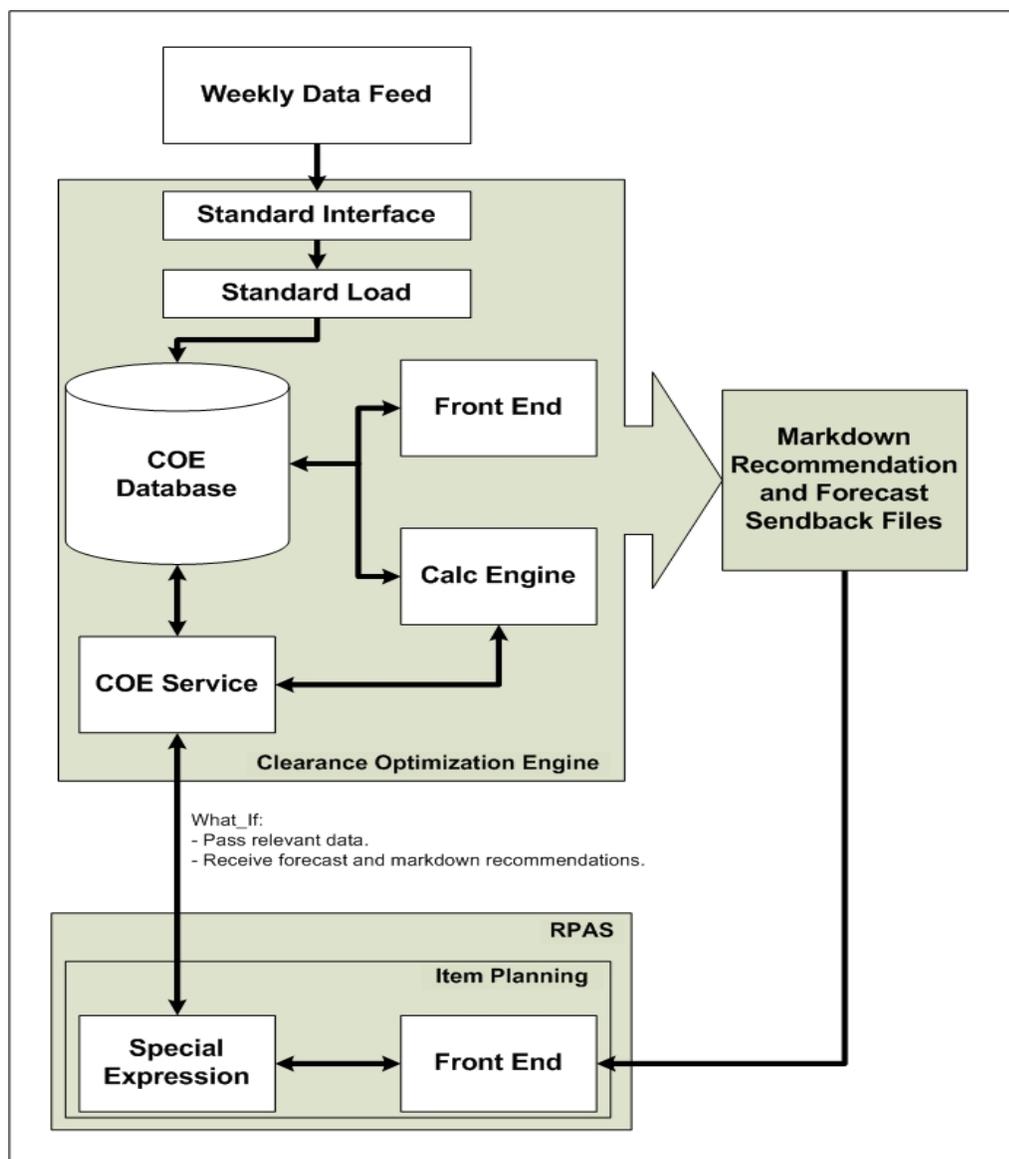
**Table 1-1 Business Rule Mapping Between COE and Item Planning**

COE Business Rule	RPAS Business Rule
Outdate	Exit Date
Planned Start Date	Start Sell Date
Sell Through Target	Sell Thru %

COE provides a sendback functionality that makes the model run results available to the Item Planning application.

The relationship between COE and Item Planning is shown in [Figure 1-1, "Relationship Between COE and Item Planning"](#).

**Figure 1-1 Relationship Between COE and Item Planning**



## Checking Your Browser Settings

Clearance Optimization Engine provides a Web-based user interface for some of the administrative features, such as User Management, Business Rules Management, Seasonality Manager, and Pricing Groups Management. You can access the application using the following Microsoft Internet Explorer versions:

- Microsoft Internet Explorer 7 running on Microsoft Windows XP Professional Service Pack 3, with Microsoft Office Professional Edition 2003.
- Microsoft Internet Explorer 8 (32-bit) running on the following operating system versions:
  - Microsoft Windows XP Professional Service Pack 3, with Microsoft Office 2003 Professional Edition 2003.
  - Microsoft Windows 7 Service Pack 1 (64-bit), with Microsoft Office Professional Edition 2007.

This section describes the browser settings for both versions of Microsoft Internet Explorer. It includes the following topics:

- [Setting Up Internet Explorer](#)
- [Setting Up Internet Explorer 8](#)
- [Setting Up Internet Explorer 9](#)

## Setting Up Internet Explorer

Complete the following steps:

- **Configure Internet Explorer's Security Settings**—add the COE URL to the appropriate zone (Local intranet or Trusted sites) to ensure that the COE application will use the appropriate security settings. For more information, see [Configuring Internet Explorer's Security Settings](#).
 

**Important:** Do not use the Internet zone to configure browser settings for COE. Use only the Local intranet zone or the Trusted sites zone, as explained in [Configuring Internet Explorer's Security Settings](#).
- **Adjust Internet Explorer's Language Settings**—if you are using a different language on your computer, you can adjust Internet Explorer to also use the same language. For more information, see [Adjusting Internet Explorer's Language Settings](#).
- **Review Cache Settings**—the default cache setting for Internet Explorer is Automatic, and normally these settings do not need to be adjusted. However, if you do want to check your cache settings, refer to [Reviewing Internet Explorer's Cache Settings](#).
- **Install and Register ActiveX components**—install and register the ActiveX components on your computer to access the COE application URL. For more information, see [Installing and Registering ActiveX Components](#).

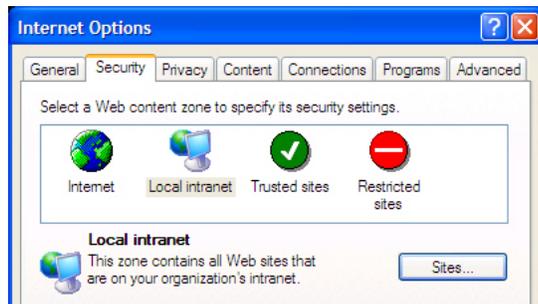
### Configuring Internet Explorer's Security Settings

To configure Internet Explorer for COE:

1. Open Internet Explorer.
2. From the Tools menu, select **Internet Options**.
3. From the **Internet Options** dialog box, click the **Security** tab.

- From the **Security** tab, click **Local intranet**, or, if you have been instructed to do so by your Systems Administrator, **Trusted sites**, and then click the **Sites** button.

**Figure 1–2 Internet Options Dialog Box**

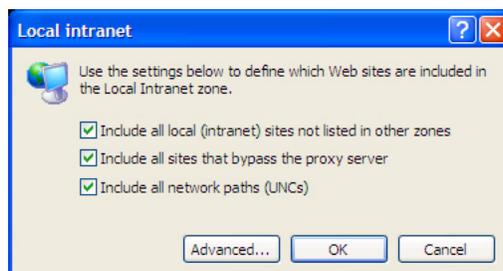


**Important:** Do not select Internet unless you have been instructed to do so by the administrator. In most cases, the COE application will be available on your company’s intranet or on a Oracle Retail trusted site.

If you selected Local intranet, go to step 5. If you selected Trusted sites, go to step 6.

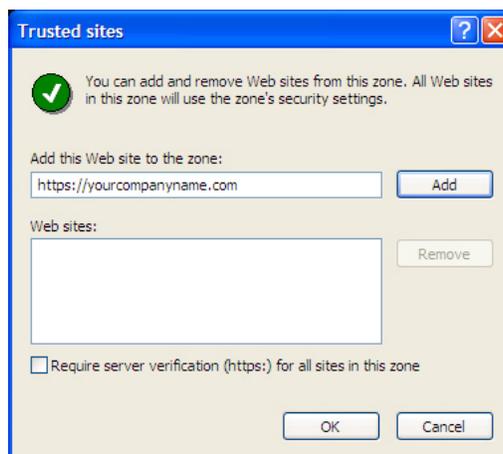
- On the Local Intranet dialog box, click the **Advanced** button, as in the following example:

**Figure 1–3 Local Intranet Dialog Box**



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

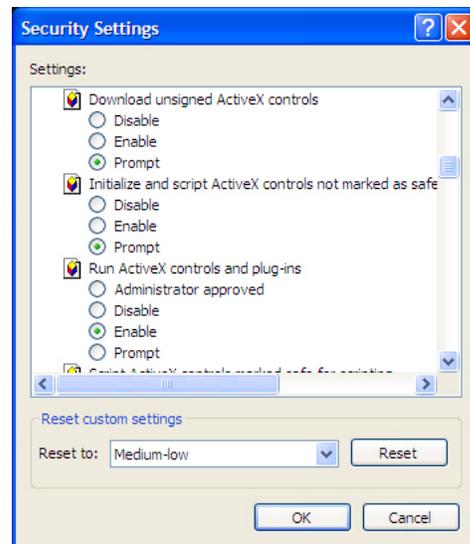
**Figure 1–4 Internet Explorer Trusted Sites**



To do so, type the COE URL in the **Add this Web site to the zone** text box. Click **Add**. When the URL appears in the Web sites list, click **OK**.

7. If the **Local Intranet** dialog box from step 5 is still open, click **OK** to close it.
8. Based on the selection your made in step 4, from the **Security Tab** of the **Internet Options** dialog box, select either **Local intranet** or **Trusted sites**. Click the **Custom Level** button.
9. The **Security Settings** dialog box opens.

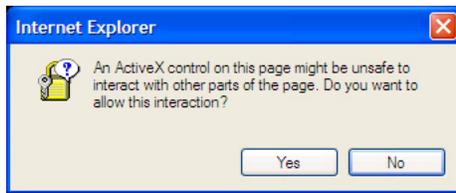
**Figure 1–5 Internet Explorer Security Settings**



10. Make sure the following commands are set to Prompt or Enable:
  - Download signed ActiveX controls
  - Run ActiveX controls and plug-ins
  - Script ActiveX controls marked safe for scripting
  - File download
  - Active scripting
  - Allow script-initiated windows without size or position constraints
  - Initialize and script ActiveX controls not marked as safe—a Microsoft ActiveX® control is required each time you export to Excel. While this ActiveX control is signed, it is not marked as safe (meaning that it could potentially be used to do unsafe things). If you set this option to Prompt, you will be prompted each time you select the COE Export action.
  - Click **OK**.

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

**Figure 1–6 Active X Warning**



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

### Adjusting Internet Explorer’s Language Settings

To adjust the language settings for Internet Explorer, do the following:

1. From Internet Explorer, select **Tools - Internet Options**.
2. Click the **Languages** button located across the bottom of the window.
3. Click the **Add** button to add another language. Select your desired language from the list, and click **OK**.
4. To remove a language, click once onto a language from the list of existing languages, and click **Remove**.
5. Click **OK** to exit the Languages dialog box.
6. From the Internet Options window, click **Apply** to apply your changes. Click **OK** to exit.

---

**Note:** The COE application supports seventeen languages: English, German, Spanish, French, Italian, Russian, Japanese, Korean, Portuguese, simplified Chinese, Taiwan Chinese, Croatian, Dutch, Greek, Hungarian, Polish, Swedish, and Turkish.. To change language settings, ensure that your Web browser settings and Windows control panel settings are set to the same language. For more information, see the COE Configuration Guide.

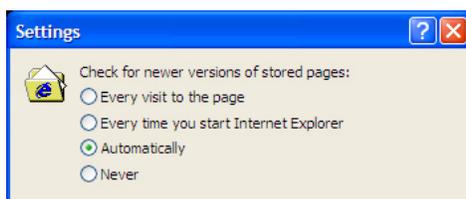
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### Reviewing Internet Explorer’s Cache Settings

To review Internet Explorer’s cache settings:

1. From the **Tools** menu, select **Internet Options**.
2. From the **Internet Options** dialog box, select the **General** tab.
3. From the **Temporary Internet Files** section of the screen., click the **Settings** button.
4. On the **Settings** dialog box, select **Automatically**, if it is not selected already, and click **OK**. An example is listed below:

**Figure 1–7 Internet Explorer Temporary Internet File Settings**



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**Note:** You can also select Every visit to the page.

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

### Installing and Registering ActiveX Components

You must install and register the COE ActiveX components (included in the COE Installation CD) on your computer to access the application URL.

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**Note:** ActiveX components may not download or install properly, even if all of the browser security settings are correct due to firewall or destination directory restrictions. This may result in a white (blank) Internet Explorer screen when you attempt to access the COE login screen.

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To install and register the COE ActiveX components:

1. From the COE Installation CD, extract the **ActiveXInstaller.zip** contents to a directory on your computer. By default, the contents get stored in a **PLActiveXInstaller** folder.
2. In the **PLActiveXInstaller** folder, double-click the **ActiveXWrapper.html** file.  
This opens the Web browser and downloads and installs the required components. A message appears when the ActiveX installation is complete.
3. Close the browser window. You can now try accessing the COE application URL.

You can also manually register the ActiveX components using the following procedure:

1. Navigate to the following location in the **PLActiveXInstaller** folder:  
`PLActiveXInstaller\activex\components\plWebUI\`
2. Extract the **PLWebUI.cab** contents to a directory on your computer. The following files are extracted:
  - **PLWebUI.inf**
  - **PLWebUI.ocx**
3. From a command prompt, run the following command:

```
regsvr32 PLWebUI.ocx
```

## Setting Up Internet Explorer 8

To configure Internet Explorer 8 for COE:

1. Open Internet Explorer.
2. From the **Tools** menu, select **Internet Options**.
3. From the **Internet Options** dialog box, click the **Security** tab.
4. From the **Security** tab, click **Local intranet**, or, if you have been instructed to do so by your Systems Administrator, **Trusted sites**, and then click the **Sites** button.

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

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If you selected Local intranet, go to step 5. If you selected Trusted sites, go to step 6.

5. On the **Local Intranet** dialog box, click the **Advanced** button.
6. On the resulting **Local intranet** or **Trusted sites** dialog box, add the COE URL if it is not already listed.  
  
To do so, type the COE URL in the **Add this Web site to the zone** text box. Click **Add**. When the URL appears in the Web sites list, click **OK**.
7. If the **Local Intranet** dialog box from step 5 is still open, click **OK** to close it.
8. Based on the selection your made in step 4, from the **Security Tab** of the **Internet Options** dialog box, select either **Local intranet** or **Trusted sites**. Click the **Custom Level** button.
9. The **Security Settings** dialog box opens.
10. From the default Internet Explorer settings, ensure that the following options are set to **Prompt** or **Enable**:
  - **Automatic prompting for ActiveX controls**
  - **Allow previously unused ActiveX controls to run without prompt**
  - **Allow script-initiated windows without size or position constraints**
11. Ensure that the **Only allow approved domains to use ActiveX without prompt** option is set to **Disable**.
12. Click **OK**.
13. In case you have Pop-up Blocker enabled, add the host name from the COE URL as an exception using the following steps:
  - a. On the **Internet Options** dialog box, click the **Privacy** tab.
  - b. On the **Privacy** tab, in the **Pop-up Blocker** section, click **Settings**.
  - c. On the **Pop-up Blocker Settings** dialog box, enter the host name in the **Address of website to allow** field, and click **Add**.
  - d. Click **Close**.
14. On the Internet Options dialog box, click **OK** to return to the browser.

## Setting Up Internet Explorer 9

To configure Internet Explorer 9 for Markdown Optimization:

1. Open Internet Explorer.
2. From the **Tools** menu, select **Internet Options**.
3. From the **Internet Options** dialog box, click the **Security** tab.
4. From the **Security** tab, click **Local intranet**, or, if you have been instructed to do so by your Systems Administrator, **Trusted sites**, and then click the **Sites** button.

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

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If you selected Local intranet, go to step 5. If you selected Trusted sites, go to step 6.

5. On the **Local Intranet** dialog box, click the **Advanced** button.
6. On the resulting **Local intranet** or **Trusted sites** dialog box, add the Markdown Optimization URL if it is not already listed.  

To do so, type the Markdown Optimization URL in the **Add this Web site to the zone** text box. Click **Add**. When the URL appears in the Web sites list, click **OK**.
7. If the **Local Intranet** dialog box from step 5 is still open, click **OK** to close it.
8. Based on the selection your made in step 4, from the **Security Tab** of the **Internet Options** dialog box, select either **Local intranet** or **Trusted sites**. Click the **Custom Level** button.
9. The **Security Settings** dialog box opens.
10. From the default Internet Explorer settings, ensure that the following options are set to **Prompt** or **Enable**:
  - **Automatic prompting for ActiveX controls**
  - **Allow previously unused ActiveX controls to run without prompt**
  - **Allow script-initiated windows without size or position constraints**
11. Ensure that the **Only allow approved domains to use ActiveX without prompt** option is set to **Disable**.
12. Click **OK**.
13. In case you have Pop-up Blocker enabled, add the host name from the Markdown Optimization URL as an exception using the following steps:
  - a. On the **Internet Options** dialog box, click the **Privacy** tab.
  - b. On the **Privacy** tab, in the **Pop-up Blocker** section, click **Settings**.
  - c. On the **Pop-up Blocker Settings** dialog box, enter the host name in the **Address of website to allow** field, and click **Add**.
  - d. Click **Close**.
14. On the Internet Options dialog box, click **OK** to return to the browser.

## Logging on to Clearance Optimization Engine

Before you access Clearance Optimization Engine for the first time, do the following:

- Check your settings for Microsoft Internet Explorer. For details, see [Checking Your Browser Settings](#).

To access Clearance Optimization Engine:

1. Open Internet Explorer.

- In the **Address** field, enter the Clearance Optimization Engine URL for your company, and press Enter.

**Figure 1–8 Internet Explorer—Address Field**



**Note:** Make sure you use https (instead of just http).

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

**Figure 1–9 Internet Explorer—Security Warning Dialog Box**



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

The Microsoft Common Dialog control is downloaded to your computer and appears in the Downloaded Program Files directory.

You are also asked to install the Microsoft XML Parser as follows:

**Figure 1–10 Internet Explorer—Security Warning Dialog Box**



- On the login screen, enter your username and password in the appropriate fields. Click the **Login** button.

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

If you forget your password, contact your Clearance Optimization Engine administrator to get a new password.

When you successfully enter your username and password, the Clearance Optimization Engine Main Menu appears.



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## Managing Users

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" on page 2-1
- "User Management Roles" on page 2-2
- "Managing User Accounts" on page 2-2
- "Working with the User Management User Interface" on page 2-9
- "Troubleshooting User Management Errors" on page 2-12

### Overview of User Management

The User Management utility enables you to create, modify, and deactivate 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 application 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. Each application comes with a set of default user account roles. If you need to add user account roles or modify the actions available for user account roles, use the Bulk Loader XML files as described in the application *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

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:

```
MDO_SUBMITTER - Merchandise Department 314 and Location Chain
MDO_SUBMITTER - Merchandise Department 327 and Location Chain
```

## User Management Roles

Along with the application user account roles, the Oracle Retail applications ship with the User Management roles that 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.

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**Important:** This section describes the roles required for user management. For more information on your application user account roles, refer to the chapter *User Management* in the application's *Configuration Guide*.

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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 will not appear on the Main Menu.

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](#)" on page 2-1.
- **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.

## 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"](#) on page 2-3
- ["Changing the Password for the Default User Account"](#) on page 2-3
- ["Changing Your Password"](#) on page 2-4
- ["Creating a User Account"](#) on page 2-4
- ["Assigning Roles and Hierarchy Levels to a User Account"](#) on page 2-5
- ["Modifying User-Related Information"](#) on page 2-6
- ["Modifying Role and Hierarchy Assignments"](#) on page 2-7
- ["Removing User Accounts"](#) on page 2-8
- ["Locking and Unlocking User Accounts"](#) on page 2-8
- ["Expiring the User Accounts"](#) on page 2-9
- ["Replacing User Roles"](#) on page 2-9

## Starting User Management

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

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**Note:** Without loading the hierarchies, although users can be created, no roles can be assigned.

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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, it is recommended that you change the *root* user account password. For more information, see ["Changing the Password for the Default User Account"](#) on page 2-3.

To manage user accounts:

1. In the Web browser, enter the application URL to log on to the application. For more information on the application URL, see the application User's Guide.
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"](#) on page 2-4.

To quit User Management, click the **Logout** link.

## 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.

## Changing Your Password

Once you log in to the application, you can change your password at any given time

To change your password:

1. From the **Main Menu**, click **Change Password**.

The **Set Password for user: username** dialog box appears.

2. Complete the **Set Password for user: username** dialog box as follows:

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

- a. In the **Old Password** text box, type your existing password.
  - b. In the **New Password** text box, type your new password. You can use any combination of letters, numbers, and symbols, up to 50 characters.
  - c. In the **Confirm New Password** text box, type your new password again.
3. Click **Done**. Your password is changed to the new password. You must use this password the next time you want to log into the application.

## 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 *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 2–1 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 25 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 25 characters (letters, numbers, and symbols) long. For example, Secret, secret, and SECRET are all considered to be unique.
First Name	Required, 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	Required, 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.
Employee ID	Optional, up to 10 numbers. The employee ID is available for your internal use.
Title	Optional, up to 50 characters. Helps you to identify the person assigned to a user name.
Email	Optional. The e-mail address associated with the user account.

**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"](#) on page 2-5.

## Assigning Roles and Hierarchy Levels to a User Account

Each user account must have one or more roles associated with the applicable hierarchies. For information about roles and hierarchies, see ["Overview of User Management"](#) on page 2-1.

To assign roles to a user account:

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**Note:** You can assign multiple roles to a user at the same time.

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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 or roles you want to assign to this user account. For details on the default roles supplied, see "[User Management Roles](#)" on page 2-2. Note that your implementation may have additional customized roles as well.

To select multiple roles, with the **CTRL** key pressed on your keyboard, select the roles you want in the **Role** list box.

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 2–1 Edit/Role Assignment Screen**



- To navigate down a hierarchy, use the right arrow.
  - To navigate up a hierarchy, use the left arrow.
6. After you have selected the role or roles and any applicable hierarchy levels, click **Done**.

The **Role Assignment for: <username>** screen updates with the role and hierarchy levels added.

If an error message appears instead, see "[Troubleshooting User Management Errors](#)" on page 2-12.

7. 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](#)" on page 2-7.

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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 *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 *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. 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 Management Roles</a>" on page 2-2.</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>" on page 2-1.</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>

To	Do this
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 enables you to remove the user from the list. You may want to remove a user account when the assigned user moves to a different position or no longer needs access. The removed users can not be re-activated.

When you remove a user account, that account is preserved in the database for reports and historical data. Use caution when removing a user account.

---

**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](#)" on page 2-7. If you want to reassign a user account to another person, see "[Modifying User-Related Information](#)" on page 2-6.

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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 **Remove User**, and then click **Apply**.  
A confirmation dialog box appears.
3. Click **Yes** to remove the user account.  
The user account is removed from the list. 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 **Manage Users** screen, click the check box next to the user account you want.
2. From the **Action** list, select **Lock Account**, and then click **Apply**.  
A confirmation dialog box appears.
3. Click **Yes**.

To unlock a user account:

1. On the **Manage Users** screen, click the check box next to a locked user account you want.
2. From the **Action** list, select **Unlock Account**, and then click **Apply**.  
A confirmation dialog box appears.
3. Click **Yes**. The Set Unlock Password for users dialog box appears.
4. Set the new password and click **Done**.

## Expiring the User Accounts

Use the *Expire User Account* feature to force the user to reset the password associated with the user account. The expired user account can be re-activated by the user by resetting the password associated with the user account.

To expire the user account:

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

## Replacing User Roles

Use the Replace Roles feature to replace the existing roles and scope of a single or multiple user accounts with roles and scope of the user account you want.

To replace the user roles:

1. On the **Manager Users** screen, click the check box next to the user accounts you want. Roles and scope associated with these user accounts will be replaced.
2. From the **Action** list, select **Replace Roles**, and then click **Apply**. The **Replace Roles** dialog box appears.
3. On the **Replace Roles** dialog box, from the **Replace Roles from User** drop-down list, select the relevant user account. Roles and scope associated with this user account will be applied to the user accounts selected in step 1.
4. Click **Done**.

## Working with the User Management User Interface

The User Management user interface enables you to work with the user accounts you have created as follows:

- ["Sorting Columns"](#) on page 2-10
- ["Filtering by Columns"](#) on page 2-10
- ["Rearranging Columns"](#) on page 2-11
- ["Hiding Columns"](#) on page 2-11
- ["Printing and Exporting User Account Information"](#) on page 2-12

## 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.

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**Note:** To remove one or more sort criteria, click **\*Select\*** from the list boxes.

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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.

## Filtering by Columns

To filter data by column heading:

1. From the **Action** list box, click **Filter Table**, and click **Apply**.

The **Customize table** dialog box opens with the **Filter Table** tab displayed.

2. Add a filter as follows:

1. Click **Add Filter**. A new **\*Column\*** list appears.
2. For multiple filters, select either of the logical operators: AND or OR.
3. From the **\*Column\*** list, select the column you want to filter by.
4. In the middle list box, select an operator (less than, less than or equal to, equal to, greater than, greater than or equal to, like or not like).
5. In the text box, type a value appropriate for the data you want to filter. Wildcards can be used.

3. Repeat step 2 until you have added the necessary number of filters, and then click **Done**. (The check boxes to the left of the **\*Column\*** lists are only used with the Delete Selected Filter(s) button.)

The Customize Table dialog box closes, and the Manage Users dialog box appears with data based on the filters you defined. In addition, the following message appears at the top of the screen:

This table has been filtered. Not all rows are visible.

To remove one or more of the filters, click the check box next to the filter(s) you want to remove. Click **Delete Selected Filter(s)**, and then click **Done**.

## 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" on page 2-11), 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 not exported or printed.)
- Information is printed or exported in the current sort order. (To change the sort order, see "Sorting Columns" on page 2-10).

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" on page 2-12
- "User Cannot Log In" on page 2-12

### Unable To Perform Request: System Error

The following error message can occur in a variety of circumstances:

Unable to perform request due to system error

#### Solution

Perform the following:

- Verify that the network is not having problems.
- Verify that the User Management database is available.

### User Cannot Log In

A user reports that their username and password combination is no longer working.

**Solution**

Log in problems are usually due to case-sensitivity issues. To solve this problem, perform the following:

- Make sure that the user has not selected the Caps Lock key.
- If you have recently changed their password or username, it is possible that Internet Explorer is storing the former password. This can occur when the only change in the user name or password is case.



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## 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" on page 3-1
- "Understanding the Business Rule Property Manager User Interface" on page 3-1
- "Locating Your Business Rules" on page 3-3
- "Modifying the Business Rule Settings" on page 3-6
- "Copying the Business Rule Settings" on page 3-8
- "Removing the Business Rule Settings" on page 3-8
- "Viewing the History of All the Business Rule Modifications" on page 3-9

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**Important:** For more information on the business rules set up for your application, refer to the chapter *Business Rule Manager* in the application's *Configuration Guide*.

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### 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-thrus, salvage values, and so on, the final value is derived by rules set during the implementation.

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**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.

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### Understanding the Business Rule Property Manager User Interface

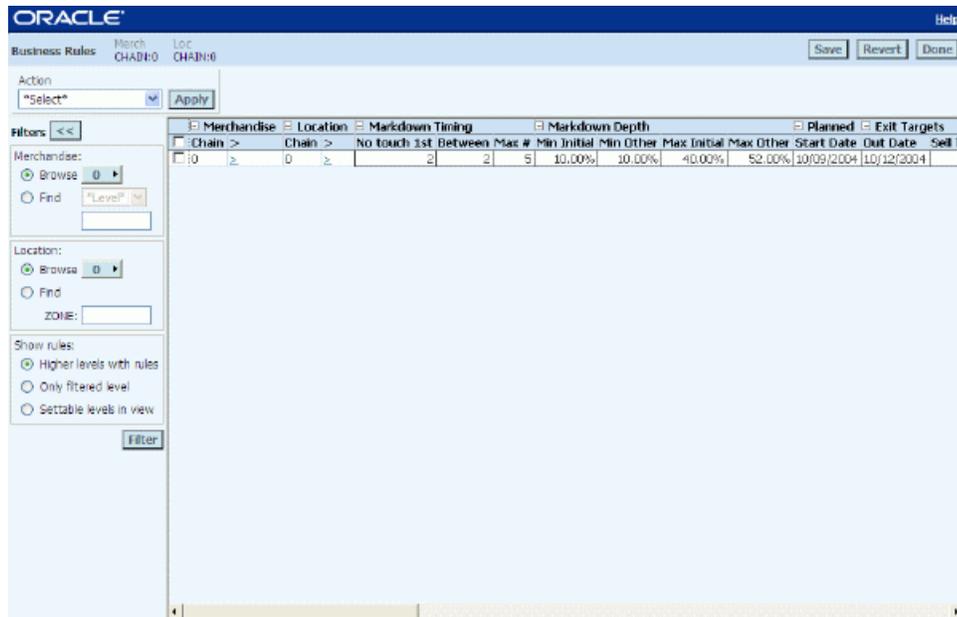
This section provides an overview of the Business Rule Property Manager user interface.

To access the Business Rule Property Manager utility:

- From the main menu, click **Business Rule Property Manager**.

The Business Rules screen appears.

**Figure 3–1 Business Rules Screen**



The Business Rules Manager screen has the following panels:

- Filters Panel – enables you to quickly navigate to any hierarchy level. See "Business Rules Filters Panel" on page 3-2.
- Grid Panel – displays the business rules. See "Business Rules Grid Panel" on page 3-3.

## 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 3–1 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.
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).

**Table 3–1 (Cont.) Business Rules Filters Panel Fields**

Field	Description
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	Blue 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"](#) on page 3-3
- ["Expanding the Hierarchies Within the Grid"](#) on page 3-4
- ["Finding a Hierarchy Entity"](#) on page 3-5

## Browsing Through the Hierarchies

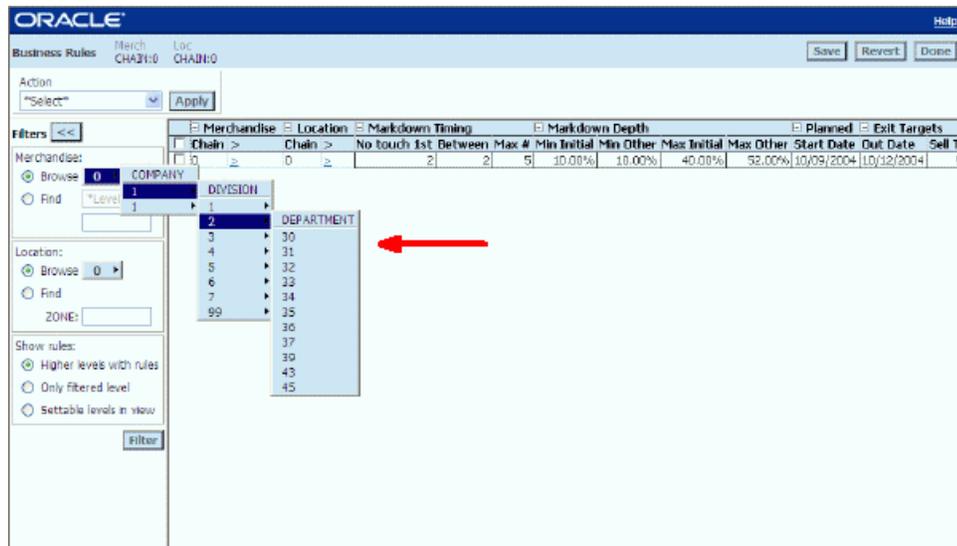
The Business Rule Property Manager user interface enables you to select a node in the Merchandise and Location hierarchies by using expandable menus. This section helps you to use the expandable menus to effectively navigate through the hierarchies.

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 3–2 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.

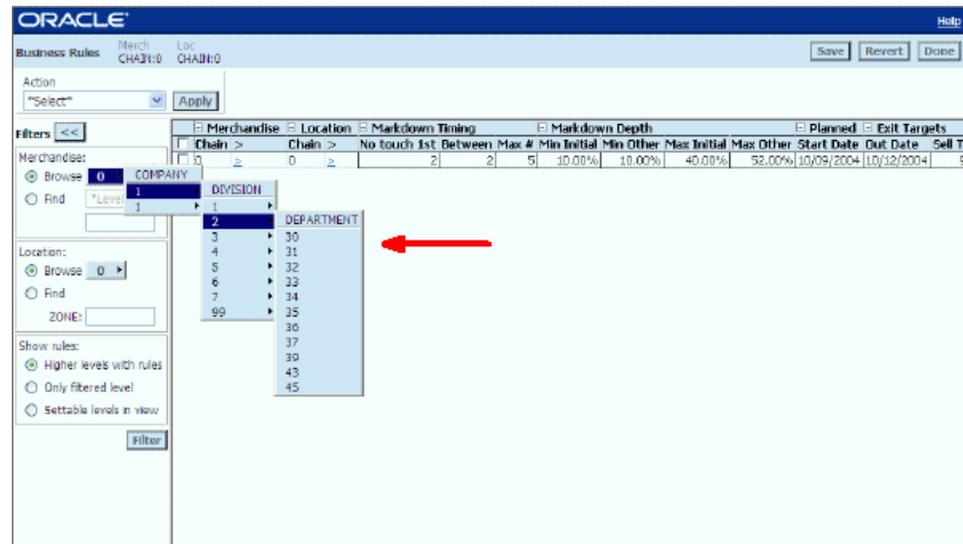
### Expanding the Hierarchies Within the Grid

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 3-3 Expanding the Hierarchies



## Finding a Hierarchy Entity

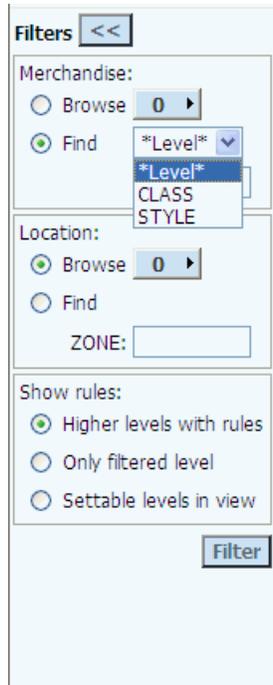
You can use the Find feature to navigate to a node (an entity on a hierarchy). Common examples of node identifiers are style, product, or store code, and so on.

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 3–4 Finding a Hierarchy Entity**



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

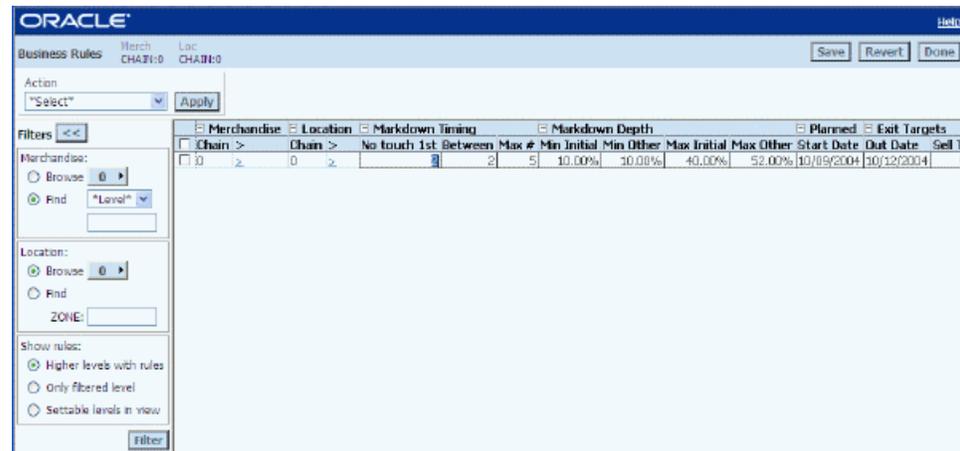
If the node exists, it appears in the grid pane. Otherwise, a message appears indicating that the node could not be found.

## Modifying the Business Rule Settings

To modify the business rules:

1. Access the **Business Rule Property Manager** utility. For more information, see ["Understanding the Business Rule Property Manager User Interface"](#) on page 3-1.
2. On the **Business Rules** screen, scroll horizontally to find the business rule you want.

Figure 3-5 Changing a value in a category



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 and the changes are not at the lowest intersection level, you are prompted to confirm if the changes should apply to the child levels of the hierarchy. If you click **Yes**, then the changes apply to the child levels. If you click **No**, then the changes do not apply to the child levels.

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**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.

---

## Modifying Planned Start Date or Out Date

To set the Planned Start Date or the Out Date to a value of NULL at the item level:

1. Access the **Business Rule Property Manager** utility. For more information, see "Understanding the Business Rule Property Manager User Interface" on page 3-1.
2. On the **Business Rules** screen, scroll horizontally to find the Planned Start Date or Out Date that you want to change.
3. Delete the existing date for the Planned Start Date or Out Date.
4. Type NONE (all caps) in the field.
5. When you have changed the business rule values as necessary, click **Save**.

To set the Planned Start Date or the Out Date to a value of NULL at the CHAIN CHAIN level:

1. Access the **Business Rule Property Manager** utility. For more information, see "Understanding the Business Rule Property Manager User Interface" on page 3-1.
2. On the **Business Rules** screen, scroll horizontally to find the Planned Start Date or Out Date that you want to change.
3. Delete the existing date for the Planned Start Date or Out Date.
4. When you have changed the business rule values as necessary, click **Save**.

When you modify the business rule settings and the changes are not at the lowest intersection level, you are prompted to confirm if the changes should apply to the

child levels of the hierarchy. If you click **Yes**, then the changes apply to the child levels. If you click **No**, then the changes do not apply to the child levels.

## Copying the Business Rule Settings

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

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**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.

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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 Property Manager 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.

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**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**.

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

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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 Property Manager User Interface](#)" on page 3-1.
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.



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## Seasonality Manager

This chapter contains:

- "Overview of the Seasonality Manager" on page 4-1
- "Seasonality Manager Screen" on page 4-2
- "Selecting Current Curves" on page 4-3
- "Selecting New Curves" on page 4-4
- "The Override Process" on page 4-4
- "Removing Overrides" on page 4-6
- "Working with Graphs" on page 4-7
- "The Analytical Refresh and Purges" on page 4-8
- "Archives and Reporting" on page 4-8

### Overview of the Seasonality Manager

Seasonality curves, which are produced by the APC MDO, are a set of weekly demand parameters that represent seasonal variations in the demand for merchandise. They represent effects that are not accounted for in the application general forecasting model. Seasonality curves are mapped to specific items based on merchandise, location, and season code. The APC MDO generates flat files for the demand parameters and mappings of those parameters that are loaded into the application as part of the standard load.

The Seasonality Manager allows users with appropriate permissions to override the mappings of seasonality curves assigned to a specified node (merchandise/location/season code). The override mapping replaces the mapping provided by the APC MDO. The override mapping affects present and future items at or below the level of the override. The following permissions apply:

- PRICE\_SEASONALITY\_VIEW – can view seasonality curves but cannot override or change mappings.
- PRICE\_SEASONALITY\_EDIT – can edit seasonality curves in order to override or change mappings. This permission only applies to hierarchies that the user has permissions to edit.

The two general situations in which a user might decide to override a seasonality curve are:

- A user from past experience knows that some seasonality curve assignments are in error. For example, the user may have noticed that last year certain merchandise

was recommended for a markdown too early because the seasonality curve was not correct.

- A user sees that an item has been unexpectedly marked down. The user goes to What-If and looks at the Base Forecast Profile and sees that the underlying seasonality shows a level of seasonal demand that is not warranted. In this case, the user may choose a new seasonality curve for a single item or a smaller subset of items.

The seasonality override persists until the next analytical refresh, at which point the override is purged from the system. The override information is archived in SEASONALITY\_MAPS\_OVR\_ARCH\_TBL. Custom reports can be written against this table to show users which nodes have over-rided seasonality curves.

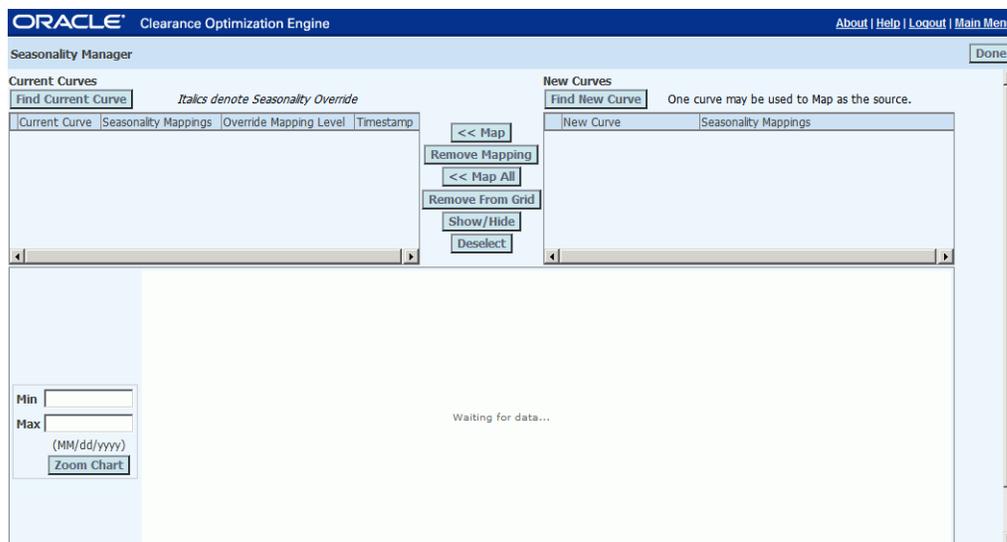
## Seasonality Manager Screen

This section provides an overview of the Seasonality Manager user interface.

To access the Seasonality Manager utility:

From the Main Menu, click **Seasonality Manager**.

**Figure 4–1 The Seasonality Manager Screen**



The Seasonality Manager screen allows users to browse and override the mappings of seasonality curves to any node specified by the merchandise and location hierarchies and the season code. The Seasonality Manager screen consists of three main areas: Current Curves, New Curves, and Chart. Nodes (each row in the grid represents a node) selected in the Current Curves grid display the current seasonality curve associated with the node. Nodes in the New Curve grid can be used to override the seasonality curve of selected nodes in the Current Curves grid.

The Current Curves grid displays descriptive information about the current seasonality curves for each specified node. For each node, the grid displays the descriptive name of the node itself, the name of the seasonality mapping for the curve, and, if a new seasonality curve has been mapped to the current curve, the grid also contains the override level of the new mapping and the timestamp for the mapping event. Each seasonality curve has a unique color associated with it, which is displayed in the left-most column. This color is the color that is used in the chart to graph the

seasonality curve. Once an overriding seasonality is mapped to the selected node, the text of the seasonality mapping, override level, and timestamp changes from a plain font to an italic font to indicate that an overriding seasonality is in force.

The New Curves grid displays descriptive information about new seasonality curves for specific nodes that can be used to override the current curves. For each node, the grid displays the name of the curve and the name of the seasonality mapping for the curve. The seasonality mappings displayed in this grid always reflect the original mappings provided by the APC MDO. Each seasonality curve has a color associated with it, which is displayed in the left-most column. This color is the color that is used in the chart to graph the seasonality curve. These colors are assigned randomly to particular seasonality curves. Any nodes in either grid that share the same seasonality curve will display the same color, but those colors may vary within or between sessions.

The Chart area provides a visual representation of selected seasonality curves. Each curve is the same color as the color associated with that curve in the grids. The curves are graphed using the Seasonality Index as the y axis and Time as the x axis. The Zoom feature allows you to define the time span that is used in the chart.

Here is a list of the Seasonality Manager screen buttons and their functionality:

**Table 4–1 Seasonality Manager UI Buttons**

Button Name	Button Functionality
Find Current Curve	Use to access the Select Nodes hierarchy selector that is used to select the nodes that may require a seasonality override.
Find New Curve	Use to access the Select Nodes hierarchy selector that is used to select the nodes with seasonality curves that may be suitable for overriding nodes in the Current Curve grid.
Map	Use to map or override the seasonality curve of the selected node in the New Curves grid to the selected node or nodes in the Current Curves.
Remove Mapping	Use to remove the seasonality curve override mapping from the selected node or nodes in the Current Curves grid.
Map All	Use for bulk overrides that match according to season code.
Remove From Grid	Use to remove the selected nodes from the Seasonality Manager display.
Show/Hide	Use to either show or hide (toggle) the selected curve or curves in the chart.
Deselect	Use to remove the highlighting from a selected node in the grid.
Zoom Chart	Use to inspect a portion of the chart for a different period of time.
Done	Leaves the Seasonality Manager to return to the Main Menu.

## Selecting Current Curves

A user may want to view the seasonality curves for a group of merchandise at a specific location. Using the hierarchy selector, it is possible to select a merchandise/location/season code node at any level of the hierarchy. In practice, the node selected will be the node that represents a group of merchandise that a user is concerned about the performance of.

The hierarchy selector interface has the following features:

- The user selections in the hierarchy tree are saved between screen sessions.

- The Season Code list does not display if a client does not use multiple season codes.
- Use **Clear All** to clear all the selected nodes in either hierarchy.

To select a node to view in the grid:

1. Click **Find Current Curve**.
2. In the Select Nodes screen, select one or more nodes from the merchandise hierarchy level, the location hierarchy level, and the season code at the level of the hierarchy you are interested in.
3. Click **Done**.
4. The curves selected are listed in the Current Curves grid.
5. To remove a curve from the grid, select it and click **Remove From Grid**.
6. Additional curves can be selected and displayed.

## Selecting New Curves

New curves are used to override existing curves. You use the New Curve functionality to select and view candidate nodes and their seasonality curves. If you find an appropriate curve, you can select it as the override curve.

To select a node to view:

1. Click **Find New Curve**.
2. In the Select Nodes screen, select the merchandise hierarchy level, the location hierarchy level, and the season code at the level of the hierarchy you are interested in.
3. Click **Done**.
4. The curves selected are listed in the New Curves grid.
5. To remove a curve from the grid, select it and click **Remove From Grid**.
6. Additional curves can be selected and displayed.

## The Override Process

Once the seasonality curves you have selected are displayed in the grid, you can select the appropriate override curve.

The choice of override curve is based on the assignment level of existing seasonality curves and on an assessment of which node is badly mapped. By looking at particular items, you can see the level of the merchandise/location hierarchies that seasonalities are assigned. The Seasonality Mapping node shows how high the APC MDO assignment for seasonality curves is made. Depending on the scope of nodes that are assigned a specific seasonality curve, you may choose to override at the topmost level or at a lower level in the hierarchy. For example, if seasonalities are assigned at the class level but only one sub-class does not fit that assigned curve, you might map (override) seasonalities for the specific sub-class.

When evaluating seasonality curves, use the following criteria:

**Shape.** Choose the curve that best represents the seasonal demand for a class of merchandise and region.

**Assignment level.** Choose a curve that is associated with a specific class of merchandise in a specific region instead of a more general curve at the Chain or Division level. The decision should be based on a determination of where in the hierarchy the assigned seasonality curve does not fit, and which new seasonality curve would most reflect the actual cadence of the node.

**Proper time frame.** Clients have seasonality curves that can span particular time frames, such as two years or five years.

Overrides apply to the parent node selected and any children of that parent node. If new items are added to a node after the override is applied, the new items also have the new seasonality curve. Overrides can be nested, and the override that applies to a node is the most specific one. Only one curve can be selected to override, but the override can be mapped to more than one curve at a time.

There are two types of overrides: Map, which maps one override to one or many nodes, and Map All, which is used for bulk overrides between nodes that have the same season code.

Season codes are retailer-specific codes that can be used to help map an item's seasonality. For example, a retailer may have four season codes (Spring, Summer, Fall, and Winter) and the seasonality assignment may be based on the merchandise class, location, and season code.

**Map.** The Map functionality is used to map a single seasonality curve you have selected in the New Curve grid as an override to the existing seasonality curves of selected nodes in the Current Grid.

To map an override:

1. Highlight the node or nodes you want to override in the Current Curve grid. To select or deselect all the nodes displayed in the grid, click the upper left corner.
2. Highlight the single node you want to use as the override in the New Curve grid. To select or deselect all the nodes displayed in the grid, click the upper left corner.
3. Click **Map**.
4. The node in the Current Curve grid now has entries for Seasonality Mappings and Timestamp, and these two entries to the grid appear in italics. The color identifying the seasonality curve is now the color of the node selected in the New Curve grid.

**Map All.** The Map All functionality involves the mapping of each node in the Current Curve grid entirely on the basis of the season codes. Each curve to be overridden must map uniquely to one new curve for each season code. Use this feature when you want to map one class of merchandise to another class without mapping each season code one at a time.

In the following example, Map All is successful because there is a one to many relationship between the season codes. Each curve to be overridden on the left can be mapped to only one curve on the right, based on the season code.

Merchandise	Location	Season Code		Merchandise	Location	Season Code
Slacks	Southeast	SPRING		Capri	Northwest	SPRING
Slacks	Southeast	SUMMER		Capri	Northwest	SUMMER
Slacks	Southeast	AUTUMN	<<Map All	Capri	Northwest	AUTUMN
Slacks	Southeast	WINTER		Capri	Northwest	WINTER

In the next example, Map All is *not* successful because there is a one to many relationship between the season codes. Each curve to be overridden on the left can be mapped to more than one curve on the right, based on the season code.

Merchandise	Location	Season Code		Merchandise	Location	Season Code
Slacks	Northwest	2004-01		Capri	Northwest	2004-01
Slacks	Northwest	2004-04		Capri	Northwest	2004-04
Slacks	Northwest	2004-08	<<Map All	Capri	Northwest	2004-08
Slacks	Northwest	2004-12		Capri	Northwest	2004-12
Slacks	Southeast	2004-01		Capri	Southeast	2004-01
Slacks	Southeast	2004-04		Capri	Southeast	2004-04
Slacks	Southeast	2004-08		Capri	Southeast	2004-08
Slacks	Southeast	2004-12		Capri	Southeast	2004-12

To map all:

1. Map All attempts to map each node in the Current Curve grid, whether or not it is selected, to one in the New Curve grid, based on season code alone. Typically, you click **Find Current Curves** and select a merchandise node, a location node, and the **All** season code selector to populate the Current Curve grid.
2. Click **Find New Curves** and select a merchandise node, a location node, and the **All** season code selector to populate the New curve grid with items that have preferable seasonality curves.

Now you have an equal number of rows in each grid – one row for each season code.

3. Click **Map All**.
4. All curves in the Current Curve grid now have entries for Seasonality Mappings and Timestamp, and these two entries to the grid appear in italics. The Seasonality Mapping identifies the curve that the user selected as the override curve. The Timestamp identifies the date of the override. The color identifying the seasonality curve is now the color of the new seasonality curve.

## Removing Overrides

An override must be removed at the same node that the override was originally assigned to. The override cannot be removed at a lower level than the level it was set at. If you want to keep a override at a child node, you must first remove the override from the parent node to which it was originally assigned and then map the override to the child node.

To remove an override:

1. In the Current Curve grid, highlight the curve or curves whose override you want to remove.
2. Click **Remove Mapping**. The override is removed and the UI no longer displays the Seasonality Mapping or Timestamp for the selected curves.

## Working with Graphs

The seasonality curves listed in the grids can be displayed in the Chart. The Zoom feature can be used to select a specific period of time to view.

Note that the number of curves you choose to display at the same time in the graph impacts both the performance of the chart and your ability to distinguish specific curves. If you choose to display a large number of curves at the same time, performance will slow and curves may overlap.

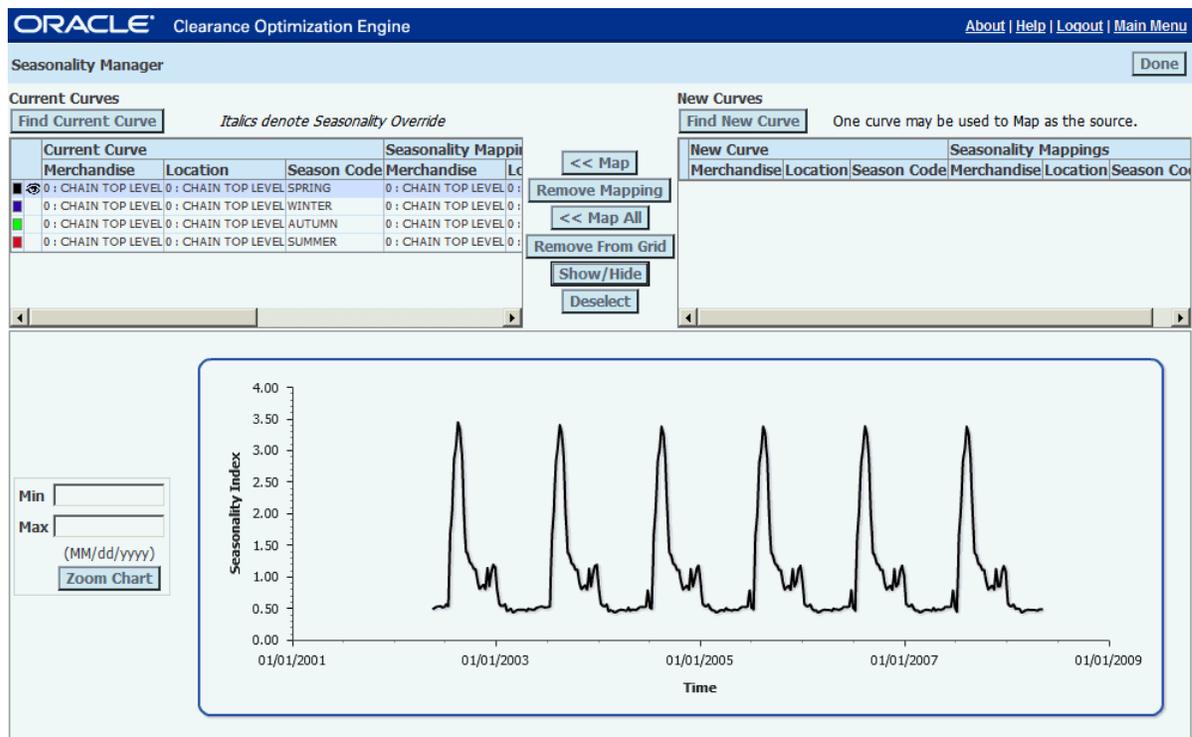
To display a curve or curves in the chart:

1. Select the curve or curves in either or both grids that you want to view.
2. Click **Show/Hide** to display the selected curves in the graph.

An eye graphic appears in the grid next to any curve that is displayed in the grid.

The curve of the same color as the color associated with that curve in the grid appears in chart.

**Figure 4–2** Graphs Displayed in the Seasonality Manager Grid



3. Click **Show/Hide** to remove the selected curves from the grid. The selected curves are removed from the graph and the eye graphic disappears.

To use the zoom feature:

1. Display the curve or curves you want to see in the chart, as described in the previous procedure.
2. In the Min field, enter the beginning date in the locale-appropriate format for the portion of the curve you want to see.

3. In the Max field, enter the ending date in the locale-appropriate format for the portion of the curve you want to see.
4. Click **Zoom Chart**. The new curves appear in the graph. Note that the time scale has changed.
5. To return to the original time scale and see the entire curve, blank out the Min field and the Max field and click **Zoom Chart**.

## The Analytical Refresh and Purges

When analytical refreshes of the analytical data produced by the APC MDO occur, they are provided to the application as part of the weekly data feed. Not every data feeds contains updates to the seasonality curves. Seasonality curves are generally updated once a year. When an analytical refresh does occur, any seasonality curve overrides that users have implemented through the Seasonality Manager are purged from the system. This is necessary in order to prevent problems that might occur as a result of changes (additions, deletions, or modifications) that Analytical Services has made to the seasonality curve. Users are informed that an analytical refresh and purge has occurred during the login procedure via the following message:

Since you last logged in, Analytical Parameters have been refreshed. In particular, Seasonalities have been refreshed, and any existing Seasonality Mapping Overrides that have been set via Seasonality Manager have been removed from the system.

## Archives and Reporting

If the Seasonality Override table is purged as a result of an analytical refresh, the data from this table is written to SEASONALITY\_MAPS\_OVR\_ARCH\_TBL in order to archive it. Custom reports can be written using this table.

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## Managing Pricing Groups

Pricing groups are sets of items that are grouped together by style, color, vendor, a combination of these, or by any other merchandise attributes that are meaningful for your company. You can take the same markdown for an entire pricing group or you can take different markdowns for each item. The outdate, target sell through, and salvage value are derived (via an inference rule set during the implementation) from the individual item properties.

The Clearance Optimization Engine includes a Pricing Group Manager that allows you to create and manage the pricing groups. This chapter describes how you can create and manage the pricing groups, and includes the following sections:

- "Creating New Pricing Groups" on page 5-1
- "Adding Items to Pricing Groups" on page 5-3
- "Removing Items from Pricing Groups" on page 5-4
- "Changing Pricing Group Names" on page 5-4
- "Deleting Pricing Groups" on page 5-5
- "Managing Information in the Pricing Groups Manager" on page 5-5

### Accessing the Pricing Group Manager

You can access the Pricing Group Manager from the Clearance Optimization Engine Main menu.

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**Important:** The Pricing Group Manager is accessible to users that have specific pricing group actions assigned to their user accounts. To access the Pricing Group Manager, ensure that your user account is assigned one of the following roles:

- PRICING\_GROUP\_EDIT – allows you to create, edit, or delete pricing groups.
  - PRICING\_GROUP\_VIEW – allows you to view the pricing groups (read-only)
- 
- 

## Creating New Pricing Groups

To create a new pricing group:

1. From the **Main Menu**, click **Pricing Group Manager**.

The **Pricing Group Manager** screen appears.

- On the **Pricing Groups** tab, from the hierarchy list boxes, select the areas to which you want to add this pricing group, and click **Show**.

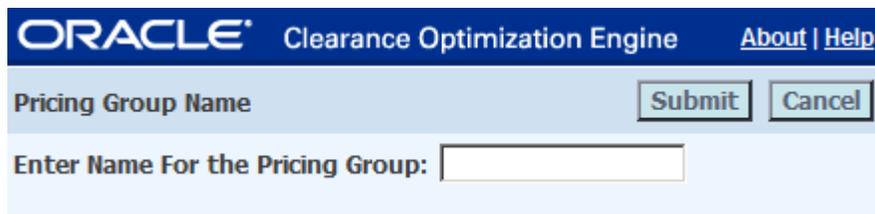
**Note:** In case there are many results for your selection, the Quick Filter will appear. The Quick filter enables you to further drill down and select the information you want to view. For more information, see “Filtering Data” on page 5-13.

The current data view updates with the pricing groups in the selected hierarchy levels.

- From the **Action** list box, click **Create Pricing Groups**, and click **Apply**.

The **Pricing Group Name** dialog box appears.

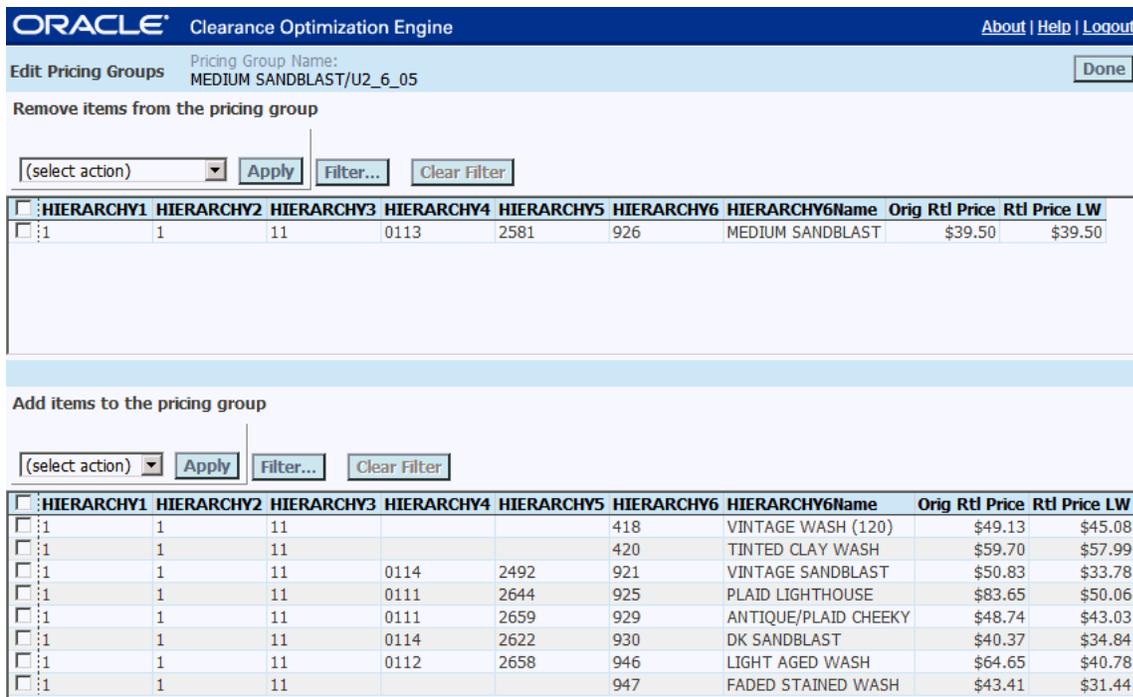
Figure 5–1 Pricing Group Name Dialog Box



- Enter a name for this pricing group (up to 50 characters using letters, numbers, spaces and dashes), and click **Submit**.

The **Edit Pricing Groups** screen appears with the new pricing group name at the top of the screen, as in the following example:

Figure 5–2 Edit Pricing Group Screen



- In the bottom portion of the **Edit Pricing Groups** screen, select the check box for each item you want to add to the pricing group. From the **Actions** list box, select **Add Items**, and click **Apply**.

The item(s) you selected now appear in the top portion of the Edit Pricing Groups screen, where you can remove them from the pricing group if necessary.

- When you are finished adding items to this pricing group, click **Done** to save your changes and to return to the Pricing Group Manager screen.

## Adding Items to Pricing Groups

To add items to a pricing group:

- From the **Main Menu**, click **Pricing Group Manager**.

The **Pricing Group Manager** screen appears.

- On the **Pricing Groups** tab, from the list boxes, select the hierarchy levels to display pricing groups (or items) and click **Show**.

- For the pricing group (or item) to which you want to add items, click the **edit** link. The edit link usually appears in the last column.

The **Edit Pricing Groups** screen appears.

**Figure 5–3 Edit Pricing Groups Screen**

The screenshot shows the Oracle Clearance Optimization Engine interface. At the top, it says 'ORACLE Clearance Optimization Engine' with links for 'About | Help | Logout'. Below that, the 'Edit Pricing Groups' section shows the 'Pricing Group Name' as 'MEDIUM SANDBLAST/U2\_6\_05' and a 'Done' button. There are two sections: 'Remove items from the pricing group' and 'Add items to the pricing group'. Each section has a '(select action)' dropdown, 'Apply', 'Filter...', and 'Clear Filter' buttons. The 'Remove items' section contains a table with one row:

<input type="checkbox"/>	HIERARCHY1	HIERARCHY2	HIERARCHY3	HIERARCHY4	HIERARCHY5	HIERARCHY6	HIERARCHY6Name	Orig Rtl Price	Rtl Price LW
<input type="checkbox"/>	1	1	11	0113	2581	926	MEDIUM SANDBLAST	\$39.50	\$39.50

The 'Add items' section contains a table with 10 rows of items:

<input type="checkbox"/>	HIERARCHY1	HIERARCHY2	HIERARCHY3	HIERARCHY4	HIERARCHY5	HIERARCHY6	HIERARCHY6Name	Orig Rtl Price	Rtl Price LW
<input type="checkbox"/>	1	1	11			418	VINTAGE WASH (120)	\$49.13	\$45.08
<input type="checkbox"/>	1	1	11			420	TINTED CLAY WASH	\$59.70	\$57.99
<input type="checkbox"/>	1	1	11	0114	2492	921	VINTAGE SANDBLAST	\$50.83	\$33.78
<input type="checkbox"/>	1	1	11	0111	2644	925	PLAID LIGHTHOUSE	\$83.65	\$50.06
<input type="checkbox"/>	1	1	11	0111	2659	929	ANTIQUÉ/PLAID CHEEKY	\$48.74	\$43.03
<input type="checkbox"/>	1	1	11	0114	2622	930	DK SANDBLAST	\$40.37	\$34.84
<input type="checkbox"/>	1	1	11	0112	2658	946	LIGHT AGED WASH	\$64.65	\$40.78
<input type="checkbox"/>	1	1	11			947	FADED STAINED WASH	\$43.41	\$31.44

- In the bottom portion of the **Edit Pricing Groups** screen, click the check box of each item you want to add to this pricing group.

- From the **Actions** list box, select **Add Items** and click **Apply**.

The item(s) you selected now appear in the top portion of the **Edit Pricing Group** screen (as in the example below).

- When you are finished adding items to this pricing group, click **Done** to save your changes and to return to the **Pricing Groups Manager** screen.

## Removing Items from Pricing Groups

To remove items from a pricing group:

- From the **Main Menu**, click **Pricing Groups Manager**.  
The **Pricing Groups Manager** screen appears.
- On the **Pricing Groups** tab, from the **Hierarchy** list boxes, select the hierarchy levels to display pricing groups (or items), and click **Show**.
- For the pricing group from which you want to remove items, click the **edit** link.  
The edit link usually appears in the last column.  
The **Edit Pricing Groups** screen appears.

Figure 5–4 Edit Pricing Groups Screen

The screenshot shows the Oracle Clearance Optimization Engine interface. At the top, it says 'ORACLE Clearance Optimization Engine' with links for 'About | Help | Logout'. Below that, the title is 'Edit Pricing Groups' and the 'Pricing Group Name' is 'MEDIUM SANDBLAST/U2\_6\_05'. There is a 'Done' button in the top right.

The main section is titled 'Remove items from the pricing group'. It contains a dropdown menu with '(select action)', an 'Apply' button, a 'Filter...' button, and a 'Clear Filter' button.

<input type="checkbox"/>	HIERARCHY1	HIERARCHY2	HIERARCHY3	HIERARCHY4	HIERARCHY5	HIERARCHY6	HIERARCHY6Name	Orig Rtl Price	Rtl Price LW
<input type="checkbox"/>	1	1	11	0113	2581	926	MEDIUM SANDBLAST	\$39.50	\$39.50

Below this is the 'Add items to the pricing group' section, which also has a dropdown menu with '(select action)', an 'Apply' button, a 'Filter...' button, and a 'Clear Filter' button.

<input type="checkbox"/>	HIERARCHY1	HIERARCHY2	HIERARCHY3	HIERARCHY4	HIERARCHY5	HIERARCHY6	HIERARCHY6Name	Orig Rtl Price	Rtl Price LW
<input type="checkbox"/>	1	1	11			418	VINTAGE WASH (120)	\$49.13	\$45.08
<input type="checkbox"/>	1	1	11			420	TINTED CLAY WASH	\$59.70	\$57.99
<input type="checkbox"/>	1	1	11	0114	2492	921	VINTAGE SANDBLAST	\$50.83	\$33.78
<input type="checkbox"/>	1	1	11	0111	2644	925	PLAID LIGHTHOUSE	\$83.65	\$50.06
<input type="checkbox"/>	1	1	11	0111	2659	929	ANTIQUE/PLAID CHEEKY	\$48.74	\$43.03
<input type="checkbox"/>	1	1	11	0114	2622	930	DK SANDBLAST	\$40.37	\$34.84
<input type="checkbox"/>	1	1	11	0112	2658	946	LIGHT AGED WASH	\$64.65	\$40.78
<input type="checkbox"/>	1	1	11			947	FADED STAINED WASH	\$43.41	\$31.44

- In the top portion of the **Edit Pricing Groups** screen, click the check box of each item you want to remove from this pricing group.
- From the **Actions** list box, select **Remove Items**, and click **Apply**.  
The item(s) you selected now appear in the bottom portion of the Edit Pricing Groups screen, where you can add them to other pricing groups if necessary.
- When you are finished removing items from this pricing group, click **Done** to save your changes and to return to the **Pricing Groups Manager** screen.

## Changing Pricing Group Names

To change a pricing group name:

1. From the **Main Menu**, click **Pricing Groups Manager**.  
The **Pricing Groups Manager** screen appears.
2. On the **Pricing Groups** tab, from the **Hierarchy** list boxes, select the hierarchy levels to display pricing groups (or items), and click **Show**.
3. For the pricing group whose name you want to change, click the **edit** link. The edit link usually appears in the last column.
4. From the **Action** list box, select **Edit Pricing Group Name**. Click **Apply**.  
The **Pricing Group Name** dialog box appears.
5. Type a new name for this pricing group, and click **Submit**. The name can be up to 50 characters. Valid characters are letters, numbers, spaces, and dashes (-).  
The name of the pricing group is updated and appears at the top of the **Edit Pricing Groups** screen.
6. Click **Done** to return to the **Pricing Groups Manager** screen.

## Deleting Pricing Groups

To delete a pricing group:

1. From the **Main Menu**, click **Pricing Groups Manager**.  
The **Pricing Groups Manager** screen appears.
2. On the **Pricing Groups** tab, select the hierarchy levels for the pricing group you want to delete, and click **Show**.
3. For the pricing group you want to delete, click the **delete** link. The delete link is in the last column in the same row as the pricing group.
4. A confirmation dialog box appears asking if you want to delete this pricing group. Click **OK** to delete the pricing group.

The pricing group is removed from the list of pricing groups. Note, however, that the items in the pricing group are not deleted; they are still available to be added to other pricing groups, if necessary.

## Managing Information in the Pricing Groups Manager

This chapter describes the tasks you can perform to manage the information that appears in the Pricing Groups Manager. It includes the following sections:

- ["Displaying Columns"](#) on page 5-6
- ["Hiding Columns"](#) on page 5-7
- ["Reordering Columns"](#) on page 5-8
- ["Creating Columns"](#) on page 5-8
- ["Editing Columns"](#) on page 5-10
- ["Deleting Columns"](#) on page 5-11
- ["Sorting Data"](#) on page 5-12
- ["Filtering Data"](#) on page 5-13
- ["Exporting Data"](#) on page 5-15
- ["Printing Data"](#) on page 5-16

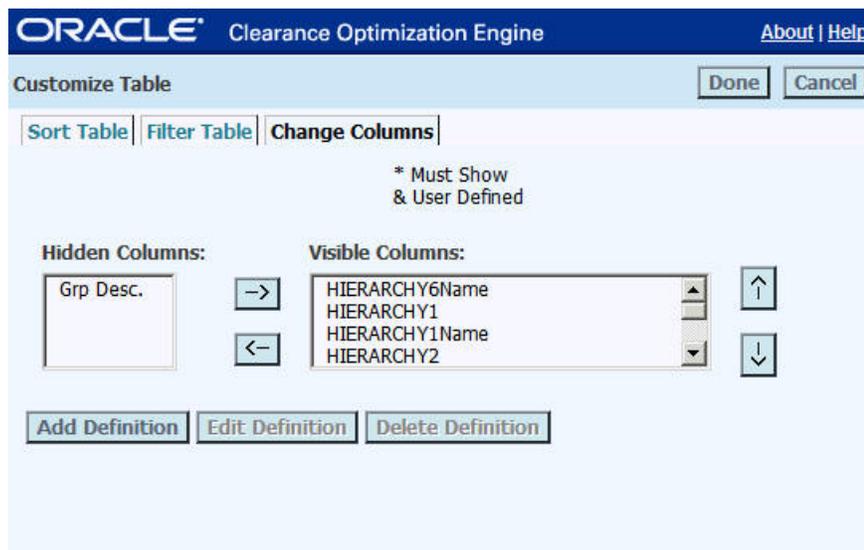
## Displaying Columns

You can display existing, previously defined columns. If you want to create a column, see "Creating Columns" on page 5-8. You can also adjust the width of columns and the height of rows. See "Adjusting Column Width" on page 5-6 and "Adjusting Row Height" on page 5-7.

To display a column on a worksheet:

1. From the Action list box, select **Modify Columns**, and click **Apply**.  
The **Customize Table** dialog box appears.

**Figure 5-5** *Customize Table Dialog Box*



2. From the **Hidden Columns** list box, click the name of the column you want to display on your worksheet.  
If no columns are listed in the **Hidden Columns** list box, all of the columns defined for this worksheet are already visible.
3. When the column you want to display is selected, click the right arrow button to move the column to the **Visible Columns** list box.  
The column is added to the bottom of the **Visible Columns** list.
4. If you want to reposition the column, click the column name, and click the up arrow button to move the column up or the down arrow button to move the column down.
5. Repeat steps 3 through 5 until you have added and repositioned all of the necessary columns. Click **Done** when you are finished.  
The **Customize Table** dialog box closes and the worksheet updates with the columns you just added.

### Adjusting Column Width

To increase or decrease the width of a column:

1. Locate a column. Hover the mouse over the left or right edge of the column. A vertical line with arrows appears.

2. While the arrows are displayed, click, hold, and drag the mouse left or right to increase or decrease the width of the column.

### Adjusting Row Height

To adjust the height of a row:

1. Locate a row. Hover the mouse over the top or bottom edge of the row. A horizontal line with arrows appears.
2. While the arrows are displayed, click, hold, and drag the mouse up or down to increase or decrease the height of the row.

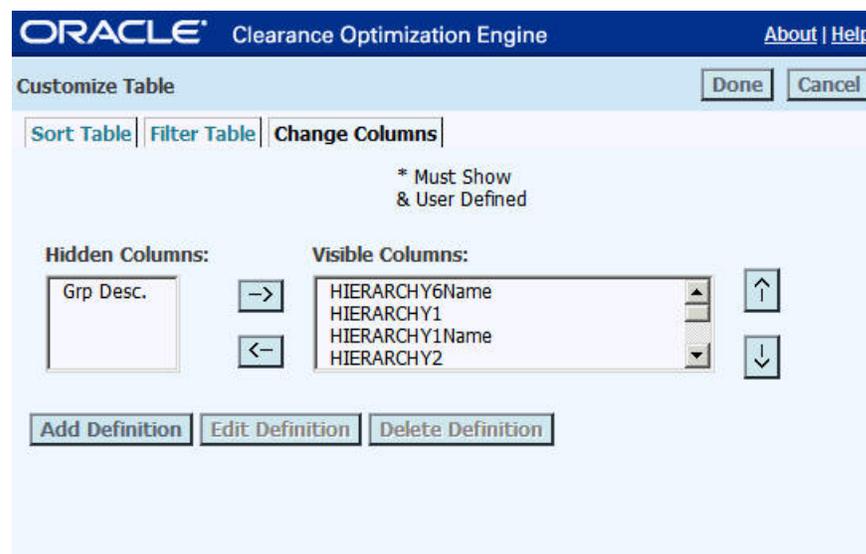
## Hiding Columns

Hiding columns is a convenient way to customize your worksheets to show only the data you are interested in. You can hide almost all columns except for those designated by an asterisk ( \* ) on the Customize Table dialog box.

To hide columns on a worksheet:

1. From the Action list box, click **Modify Columns**, and click **Apply**.  
The **Customize Table** dialog box appears.

**Figure 5-6** Customize Table—Hiding Columns



2. From the **Visible Columns** list box, click the name of the column you want to remove from your worksheet.  
You cannot hide columns designated with an asterisk ( \* ).
3. When the column you want to hide is selected, click the left arrow button to move the column to the **Hidden Columns** list box.
4. Repeat steps 3 and 4 until you have listed all of the columns you want to hide, and then click **Done**.

The **Customize Table** dialog box closes and the worksheet updates without the columns you just hid.

## Reordering Columns

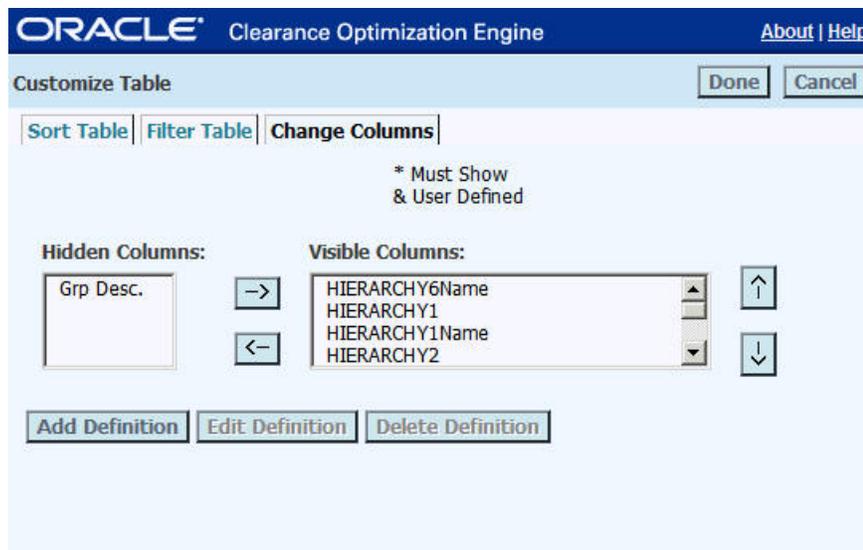
You can customize all of your worksheets by positioning the columns in the order that is most relevant to you.

To reorder columns on your worksheet:

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

The **Customize Table** dialog box appears.

**Figure 5-7** *Customize Table—Reordering Columns*



2. In the **Visible Columns** list box, click the name of the column you want to reposition on your worksheet.
3. When the column you want to reposition is selected, click the up arrow button to move the column up in the list, or click the down arrow button to move the column down in the list.
4. Repeat steps 3 and 4 until the columns are listed in the order you want, and then click **Done**.

The **Customize Table** dialog box closes and the worksheet updates with the new order of columns.

## Creating Columns

If you want a value that is not already provided by the existing columns, you can create a new column that produces a value from one or more columns. For example, you may want the value of total inventory for a given item or pricing group. In this case, you could create a new column called Total Inventory that sums the values of the On Hand inventory column and the On Order inventory column.

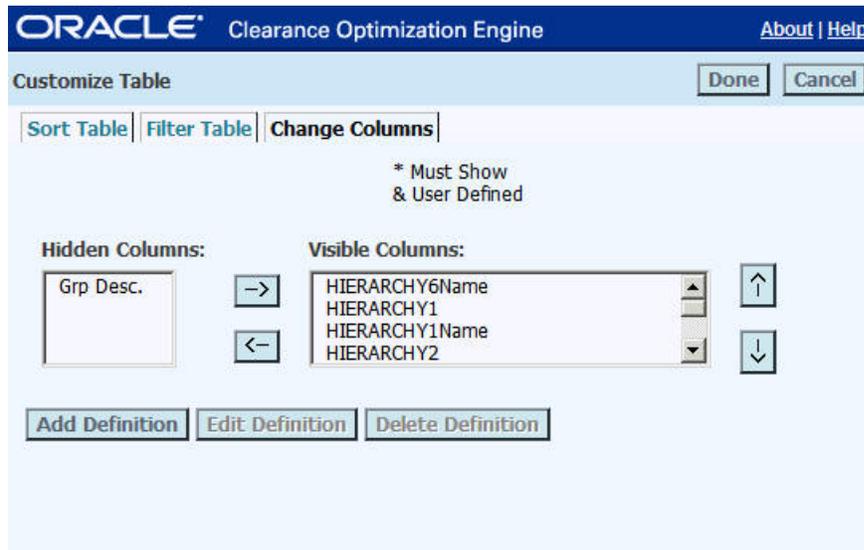
The columns you add are available to your user account only; they are not available to other users. In addition, the columns you add are specific to worksheet types.

To create a column:

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

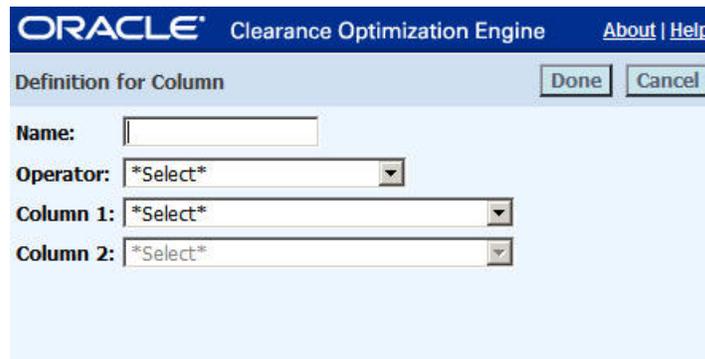
The **Customize Table** dialog box appears.

Figure 5–8 Customize Table—Creating Columns



2. Click **Add Definition**. The **Definition for Column** dialog box appears.

Figure 5–9 Definition for Column Dialog Box



3. Complete the following:
  - **Name**—enter the name of the column as you want it to appear on the worksheet. The size of the worksheet column will expand to fit the name. Use only letters and digits. Spaces and special characters are not allowed.
  - **Operator**—select one of the following operators:
    - Sum of 2 columns to add two columns. For example, you might want to add the On Hand inventory column and the On Order inventory column to show the total of all inventory that will be available for selling.
    - Difference of 2 columns to subtract one column from another. For example, you might want to see the difference between the Orig. Price column and the Rec. Price column to show the dollar amount by which the item has been reduced.
    - Ratio of 2 columns to divide two columns. For example, you might want to divide the On Hand inventory column by the On Order inventory column to produce a ratio of how much inventory is in stock to how much inventory you expect to arrive.

- Cumulative sum of a column to show running (or incremental) totals. For example, you may want to see how the value of on hand inventory increases for each pricing group.
  - **Column 1**—select the column appropriate for the column list you selected. Select only columns with numerical data. Text based columns cannot be calculated.
  - **Column 2**—If you selected Cumulative sum of a column as the operator, Column 2 is disabled. Otherwise, select the column appropriate for the type of operation you selected.
4. When the definition for your new column is complete, click **Done**.  
The **Definition for Column** dialog box closes, and the column you just created appears in the **Hidden Columns** list. The column name is preceded by an ampersand ( & ) to indicate that it is a user-defined column.
  5. In the **Customize Table** dialog box, select the column in the **Hidden Columns** list, and click the right arrow button to move it to the **Visible Columns** list.  
The column is added to the bottom of the Visible Columns list.
  6. If necessary, reposition the new column by clicking the up and down arrows, and then click **Done**.  
The Customize Table dialog box closes and the worksheet updates with the column you just created. The column is populated automatically.

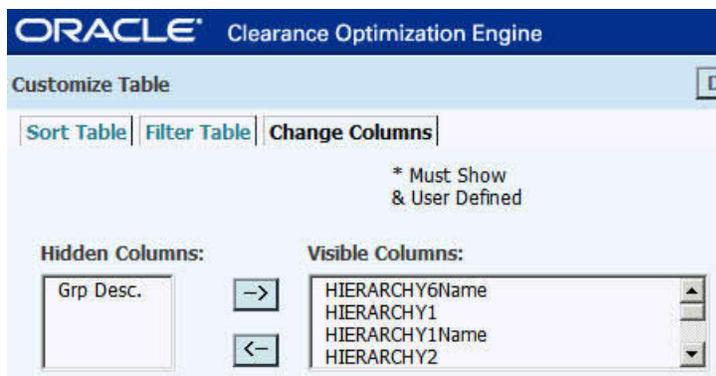
## Editing Columns

You can edit only columns that you have created. These columns, referred to as user-defined columns, are designated with an ampersand ( & ) after the column name within the Customize Table dialog box. You cannot edit the existing columns supplied by Clearance Optimization Engine.

To edit a column:

1. From the **Action** list box, click **Modify Columns**, and click **Apply**.  
The **Customize Table** dialog box appears.

**Figure 5–10 Customize Table—Editing Columns**

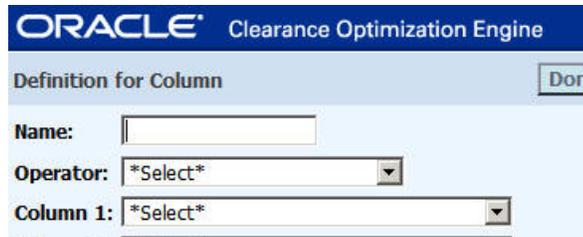


2. In the **Hidden Columns** list box or the **Visible Columns** list box, select the column you want to modify. You can edit only those columns whose names are preceded by an ampersand (&).

3. Click **Edit Definition**.

The **Definition for Column** dialog box appears.

**Figure 5–11 Definition for Column Dialog Box**



4. Update the **Definition for Column** dialog box as necessary.

5. When your changes are complete, click **Done**.

The **Definition for Column** dialog box closes, and the updated column remains in its original position on the **Customize Table** dialog box.

6. If necessary, move or reposition the column on the **Customize Table** dialog box, and click **Done**.

The **Customize Table** dialog box closes, and the worksheet updates with the column you just modified.

## Deleting Columns

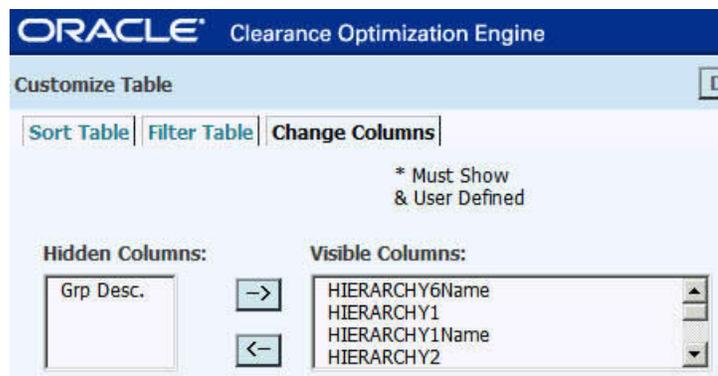
You can only delete columns that you have created. These columns, referred to as user-defined columns, are designated with an ampersand ( & ) after the column name within the **Customize Table** dialog box.

To delete columns:

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

The **Customize Table** dialog box appears.

**Figure 5–12 Customize Table—Deleting Columns**



2. In the **Hidden Columns** list box or the **Visible Columns** list box, select the column you want to delete. You can delete only those columns whose names are preceded by an ampersand (&).

3. Click **Delete Definition**.

A confirmation dialog box appears.

4. Click **OK** to delete the column.

The column is removed from the Customize Table dialog box. If you want to use this column again, you must recreate it.

## Definition for Column Dialog Box

Use the Definition for Column dialog box to create a new user-defined column or to modify an existing user-defined column.

Field	Description
Name text box	<p>Enter the name of this column as you want it to appear on the worksheet. The size of the worksheet column will expand to fit the name.</p> <p>Use only letters and digits in the column name. Do not use spaces or special characters.</p>
Operator list box	<p>Select one of the following:</p> <ul style="list-style-type: none"> <li>■ Sum of 2 columns to add two columns. For example, you might want to add the On Hand inventory column and the On Order inventory column to show the total of all inventory that will be available for selling.</li> <li>■ Difference of 2 columns to subtract one column from another. For example, you might want to see the difference between the Orig. Price column and the Rec. Price column to show the dollar amount by which the item has been reduced.</li> <li>■ Ratio of 2 columns to divide two columns. For example, you might want to divide the On Hand inventory column by the On Order inventory column to produce of ratio of how much inventory is in stock to how much inventory you expect to arrive.</li> <li>■ Cumulative sum of a column to show running (or incremental) totals. For example, you may want to see how the value of on hand inventory increases for each pricing group.</li> </ul>
Column 1 list box	<p>Select the column appropriate for the operator that you selected. Make sure that you select only columns with numerical data; for example, the Status and Description columns cannot be calculated.</p>
Column 2 list box	<p>If you selected Cumulative sum of a column as the operator, the Column 2 list box is disabled. Otherwise, select the column appropriate for the type of operation you selected.</p>

## Sorting Data

Sorting data allows you to display data in a specific order, such as highest to lowest gross margin and lowest to highest opportunity cost.

To sort data:

1. From the Action list box, click **Sort Table**, and click **Apply**.

The **Customize Table** dialog box, **Sort Table** tab appears.

Figure 5–13 Customize Table—Sort Table Tab

2. Enter sort criteria as follows:
  - a. Select a column from the first list box. This column becomes the primary sort column for the worksheet.
  - b. For that column, select a sort order, either ascending order (A - Z or 1 - 10) or descending order (Z - A or 10 - 1).
  - c. If you want the worksheet to be sorted by additional columns, select a column and sort order for the remaining two list boxes.
3. When the list boxes and sort order reflect the way you want the worksheet to be sorted, click **Done**.

The **Customize Table** dialog box closes, and the worksheet is updated to display data in the sort order you selected.

To remove one or more of the sort criteria, click **\*Select\*** from the list boxes and then click **Done**.

## Filtering Data

Filtering allows you to display a subset of data that meets the criteria you define (such as Current Retail > \$10.00). You can filter by item and grouping attributes or by using multiple criteria. For more information on filtering, see the following:

- "Using the Quick Filter Option" on page 5-13
- "Filtering by Columns" on page 5-14
- "Filtering by Merchandise Hierarchy" on page 5-15

### Using the Quick Filter Option

Filter data using the Quick Filter option located next to the Action menu. To use the Quick Filter, complete the following steps:

1. Click the **Filter** button located next to the Action drop-down list.
2. From the sliding panel, use the drop down lists to select a region, hierarchy level, or enter details for a specific item.

3. After selecting your filters, click **Apply**. The worksheet appears with the filter options selected. Click **Close** to close the sliding panel.

**Clearing Worksheet Filters** After filtering worksheet data, you may wish to remove the filters and return to the original, unfiltered worksheet.

To clear a worksheet filter, complete the following steps:

1. From the worksheet, select the **Clear Filters** button located next to the Action menu.
2. The worksheet is returned to its original state.

### Filtering by Columns

To filter data by column independent of the merchandise hierarchy:

1. From the **Action** list box, click **Filter Table**, and click **Apply**.

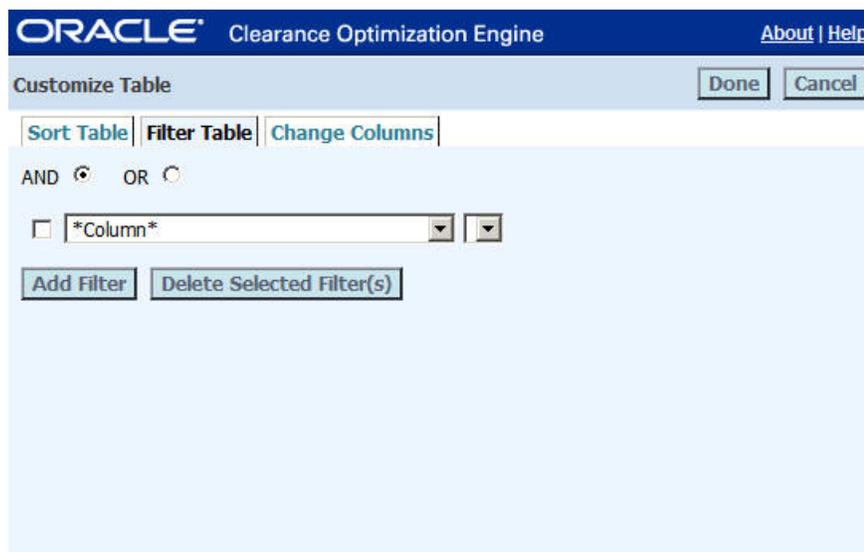
---

**Note:** The Filter Table action is not available on all worksheets.

---

The **Customize table** dialog box opens with the **Filter Table** tab displayed.

**Figure 5–14 Customize Table - Filter Table**



2. Add a filter as follows:
  - a. Click **Add Filter**. A new **\*Column\*** list appears.
  - b. From the **\*Column\*** list, select the column you want to filter by.
  - c. In the middle list box, select an operator (less than, less than or equal to, equal to, greater than, greater than or equal to).
  - d. In the text box, type a value appropriate for the data you want to filter.
3. Repeat step 3 until you have added the necessary number of filters, and then click **Done**. (The check boxes to the left of the **\*Column\*** lists apply only to the Delete Selected Filter(s) button; they do not affect which filters are used on the current grid.)

The Customize Table dialog box closes, and the worksheet appears with data based on the filters you defined. In addition, the following message appears at the top of the screen:

This table has been filtered. Not all rows are visible.

To remove one or more of the filters, click the check box next to the filter(s) you want to remove. Click **Delete Selected Filter(s)**, and then click **Done**.

### Filtering by Merchandise Hierarchy

To filter data by the merchandise hierarchy:

1. From the merchandise hierarchy drop-down lists, select **Class**, **Sub Class**, and **Item** (or whatever the equivalent is for your implementation), depending on the level of data you want to display.
2. When the merchandise hierarchy filters reflect the level of data you want to display, click **Show**.

The worksheet appears with only the merchandise that meets the criteria you selected.

## Exporting Data

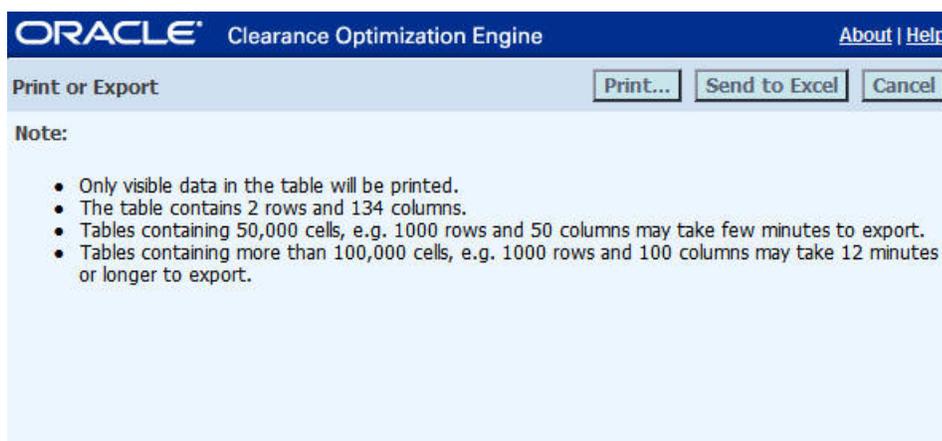
You can export data from most of the worksheets or maintenance grids into Microsoft Excel 2000 or newer.

To export data from worksheets:

1. On the screen, filter the worksheet or merchandise grid, expand/collapse rows, and show /hide columns to reflect the data you want to export. Only visible data is exported.
2. From the Action list box, click **Print or Export** and click **Apply**.

The following appears:

**Figure 5–15 Print or Export Screen —Exporting Data**



3. Click **Send to Excel**.

A message box appears with an Export Complete message followed by the path and file name of the Excel file. Additionally, an Excel spreadsheet file with the exported data opens in a new browser window.

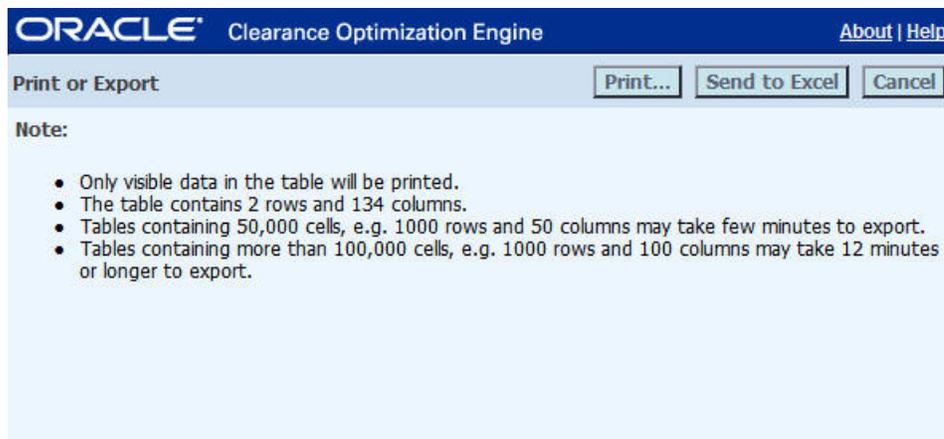
## Printing Data

To print a worksheet:

1. On the screen, filter the worksheet, merchandise, or business rules grid to reflect the data you want to print. Only visible data is printed.
2. From the Action list box, click **Print or Export**, and click **Apply**.

The following appears:

**Figure 5–16 Print or Export Screen—Printing Data**



3. Click **Print**.

A print dialog box appears. This dialog box is part of your operating system and not Clearance Optimization Engine.

4. Adjust the options on the dialog box as necessary, and click **OK**.

## Customize Table Dialog Box

The Customize Table dialog box appears when you select the Sort Table, Modify Columns, or Filter table actions from any worksheet.

When you sort, modify columns (i.e., change column order or add new columns) or filter, your changes stay in effect until you change them.

The Customize Table dialog box consists of the following tabs:

- Sort Table tab
- Change Columns tab
- Filter Table tab - appears on Customize Table db only when filtering is available

### Sort Table Tab

Use this tab to set a sort order for the grid on the current screen.

For each grid, you can select up to three columns by which you want to sort. The first column you select is the primary sort column, meaning that the grid is sorted by this column first. The remaining two columns are the secondary and tertiary sort columns, meaning that after the grid is sorted by the primary column, it is sorted by the secondary column (if you selected one), and the tertiary column (again, if you selected one).

You can sort by one, two, or three columns. Each of the Sort by and Then by lists contain all of the columns that are on the selected screen.

**Sort by:** This is the primary sort column. If you plan to sort by one column only, you must select the column from this list.

**Then by:** These lists are the secondary and tertiary sort columns.

**A - Z and 1 - 100:** This option sets an ascending sort order (e.g., alphabetical order) for the corresponding column.

**Z - A and 100 - 1:** This option sets descending sort order (e.g., reverse alphabetical order) for the corresponding column.

### Change Columns Tab

Use this tab to change the number and order of the columns that are available on the current screen.

**Hidden Columns:** This list contains columns that are available for the current screen but that you have elected to hide. These columns remain hidden unless you move them to the Visible Columns list.

**Visible Columns:** This list contains the columns that appear on the current screen.

**Sort buttons:** Use the arrow buttons that appear within the dialog box to hide or show columns and to change the order in which columns appear on the current screen.

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#### Note:

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To move one column at a time, click the column name and then click the button that represents the direction in which you want to move the column.

To move multiple columns at a time:

- Adjacent columns - Click the first column you want to select, press the Shift key, and then click the last column you want to select. Then, release the Shift key and click the button that represents the direction in which you want to move the columns.
- Nonadjacent columns - Click a column and press and hold the Ctrl key as you select other columns. Then, release the Ctrl key and click the button that represents the direction in which you want to move the columns.

**Add Definition button:** Click this button to display the "[Definition for Column Dialog Box](#)" on page 5-12 from which you can add a new column. For step-by-step instructions, see "[Creating Columns](#)" on page 5-8.

**Edit Definition button:** Click this button to display the "[Definition for Column Dialog Box](#)" on page 5-12 from which you can change the definition of the selected user-created column.

- This button is available only when you first click a user-created column.
- User-created (same as user-defined) columns are marked with an ampersand (&).

**Delete Definition button:** Click this button to delete the selected user-created column. A confirmation dialog appears asking you to confirm that you want to delete this column.

Caution: There is no undo feature, so make sure you want to delete the column before clicking OK. If you delete the column and later decide that you want to use it, you must recreate it.

### **Filter Table Tab**

Use this tab to display only those rows of data that you are interested in. For step-by-step instructions, see "[Filtering Data](#)" on page 5-13.

Column list: Select the column whose data you want to filter. All of the columns for the current grid appear in this list. When you select a column, the following occurs:

- The next list populates with the operators (e.g., is equal to, or <, +) appropriate to the data in the column.
- A text box appears for you to enter a value appropriate to the data you want to filter.

Add Filter button: Click this button to display the Column list and corresponding check box and filters list.

Delete Selected Filter(s) button: Click this button to delete the filter(s) whose check boxes you have selected. There is no undo feature, so make sure you want to delete the filter before clicking the Delete Selected Filter(s) button. There is no confirmation message, and if you delete the filter and then decide that you want to use it, you must recreate it.

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