Leading in a Time of Crisis – How to Utilize Oracle RPAS Cloud Edition What-If Scenarios
PURPOSE STATEMENT

This document provides recommendations on how to utilize the inherent What-If Scenario functionality available in the Retail Predictive Application Server Cloud Edition (RPAS CE). This training includes suggestions on managing multiple forecasting scenarios and is intended solely to enable you to maximize your RPAS CE solution during this difficult time.

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HOW TO UTILIZE WHAT-IF SCENARIOS

We understand many RPAS CE customers are experiencing challenges managing projections and forecasts during this unprecedented era in Retail. Depending on the impact to your business, the Oracle Retail team recommends RPAS CE users review, assess and employ What-If Scenario functionality as needed during and after the health crisis period.

1. **What-If Scenario Objectives:** This functionality enables strategic planning capability with multiple renditions of plans/forecasts while keeping the primary plan intact. Additional plan versions (scenarios) are created to simulate different outcomes for comparison and review. What-If Scenarios maintains a primary plan/forecast while preparing a stretch plan to quickly react to the ever-changing business trends. The primary plan (*Master Scenario*) is the only rendition that can be committed to the database. The other scenarios do not have commit functionality; this prevents you from accidently committing the wrong values of various stretch plans to the database. This base RPAS CE functionality is available for any workspace in your configuration.

   - Each scenario is a distinct and separate copy; modifications to data in one scenario does not impact the others. This allows you to develop multiple outcomes plans with different and varied approaches.

   - Multiple scenarios may be viewed and analyzed simultaneously. Three (3) scenarios are available at one time including the Master Scenario.

   - The biggest difference in functionality between What-If Scenarios and creating multiple workbooks of the same dataset is that with What-If Scenarios only the Master Scenario can be committed. Other What-If Scenarios are working copies and must be promoted for action items (Application Actions and/or Commit) to be enabled. These ensures the database is only updated with deliberate intent and you do not accidently commit a ‘copy’ of a working plan.

2. **What-If Scenario Training:** What-If Scenario functionality is utilized in the following manner:
A. **Create a What-If Scenario**
   
   I. Build or open an existing workspace to provide the copy of the data set.
   
   II. Click on the **Scenario tab** in the View Management Drawer.
   
   III. Click on the gear setting beside Initial copy and select **Duplicate**.
   
   IV. Name the new What-If Scenario to indicate the intent of this stretch plan (i.e. Open May wk 1, Open May wk 4). The new What-If Scenario workspace builds.
   
   V. Open new scenario by clicking on the workspace name hyperlink (i.e. Open May wk 1) or by clicking on the gear setting and selecting **Open** or **Open in new tab**.
   
   VI. Repeat steps 3-7 to create a secondary What-If Scenario as desired.
   
   VII. Multiple What-If Scenarios may be opened at the same time for comparison and review.
   
   ➢ **Best Practice** is to rename the Master Scenario (Initial) to indicate the intent of this copy (i.e. Original Forecast).
   
   ➢ *The opened workspaces will be a concatenation of original source copy + user defined label.*
   
   Or
   
   VIII. What-If Scenarios may also be created via the ‘+’ icon in the bottom of the scenario section and executing steps 4-8.
   
B. **Open existing What-If Scenario**
   
   I. Open an existing workspace that includes the previously created What-If Scenarios.
   
   II. Click on the **Scenario tab** in the View Management Drawer.
   
   III. Click on the workspace name hyperlink or click gear setting beside the What-If scenario name and select **Open** or **Open in new tab**.
IV. Multiple What-If Scenarios may be opened at the same time for comparison and review.

- The Master Scenario (primary copy) is indicated by green circle icon.

C. What-If Scenario on Dashboard page

I. What-If Scenarios are also available on the home page of Dashboard under Recent Plans.

II. Click on the down arrow (carrot) under the workspace. All available scenarios are displayed with the Master scenario indicated by green circle icon. The last opened date and time for the workspace is displayed.

III. Click on the workspace name hyperlink for an individual scenario or click gear setting beside initial workspace name and select Open or Open in new tab. Workspaces may be launched into a new browser tab.

D. Promoting a What-If Scenario

I. Only the Master Scenario has Commit functionality enabled. When you determine that a stretch rendition (What-If Scenario) is the appropriate plan to be committed to the database, that What-If Scenario must be promoted.

II. Click on the Promote Scenario button at the bottom of the Action Tray.
III. A notification displays allowing you to Dismiss notification or Undo the promotion.
- Select ‘Dismiss’ to promote What-If Scenario to Master Scenario. The previous Master Scenario becomes an alternate What-If Scenario.
- Select ‘Undo’ for the current Master Scenario to remain.

IV. You must execute Commit to copy the new Master Scenario values to the database.

3. **What-If Scenario Considerations:** Remember the following details:

   - There is a maximum of three (3) scenarios, including Master Scenario. Once the limit is reached the ‘+’ icon and Duplicate functionality are not enabled.

   - Recap of What-If Scenario gear setting functionality:
     - **Duplicate** – only enabled if the three (3) scenarios are not already created.
     - **Rename** – user labels scenario by detailing the scenario intent.
     - **Delete** – removes scenario workspace copies. Master Scenarios may not be deleted.
     - **Open** – opens What-If Scenario workspace.
     - **Open in new tab** - open What-If Scenario workspace in new browser tab (functionality for dual monitors).

   - What-If Scenarios are workspaces and will be included in all typical workspace/workbook purges executed for RPAS CE solution. Frequently, workspaces/workbooks are purged every weekend to prevent stale hierarchies to be included in workspaces. If analysis results are required past the purge time frame, best practice is to export values of desired scenarios KPIs.

The Oracle Retail team is here to help and is standing by its customers and solutions during these difficult and challenging times. If you have any questions regarding this bulletin, or the RPAS CE platform, please feel free to email us at retail-central-consulting_ww@oracle.com and one of our specialists will be in contact with you.
Managing your forecast through the health crisis
June, 2020
Author: Guiming Miao
Contributing Authors: Oracle Retail Consulting