Navigation for Analyzing

- 1. Navigation Options
  - 1.1 Dependency View
  - 1.2 List
  - 1.3 Details
- 2. Navigation by Object
  - 2.1 Data field
    - i. Dependency View for complete analysis
    - ii. List for data flows only
  - 2.2 Calculation
    - i. Dependency View for complete analysis
    - ii. List for data flows only
  - 2.3 View
  - 2.4 Archives
  - 2.5 Master Table
  - 2.6 Condition
- 3. Detailed Analysis by Object
  - 3.1 Data field
  - 3.2 Calculation
    - i. Properties
    - ii. Configuration
    - iii. Display Text

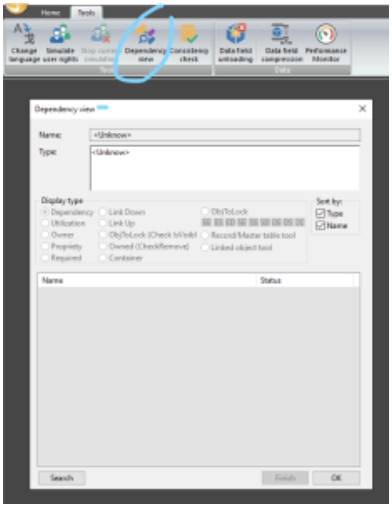
1. Navigation Options

When navigating in the tool, we need to analyze flows and interdependence between objects. We have at least three ways to accomplish this analysis.

1.1 Dependency View

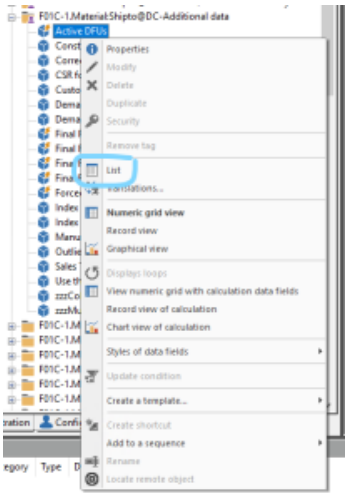
The dependency view is the more complete navigation option.

- You can use its "Search" function to find an object for which we know the name or the record ID.
- You can use the different display types to see all object properties and all possible links with other objects.



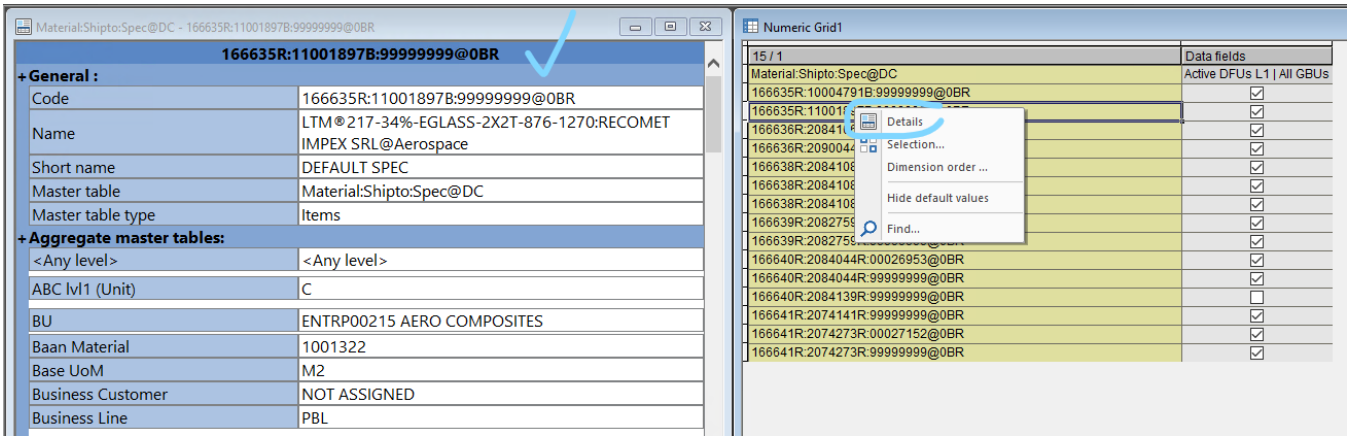
1.2 List

The list is the most dynamic navigation option: depending on the object you're analyzing, it will be the only way to get interdependences or it will give you only partial information.



1.3 Details

The Details is useful when you would like to see all information related to a record: it prevents having to open the hierarchy. It synchronizes by clicking on the record.



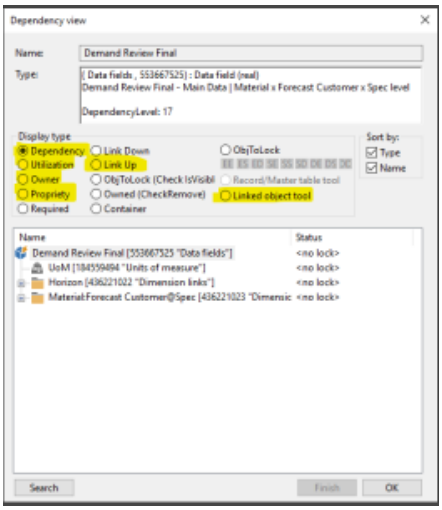
2. Navigation by Object

2.1 Data field

For data fields, either Dependency View or List works: it depends what you want to analyze.

i. Dependency View for complete analysis

- Dependency: UoM and dimensions
- **Utilization: related calculations and archives**
- Owner: related data table
- Propriety: record ID
- Required: N/A
- Link Down: N/A
- **Link Up: related calculations, archives, views, workspaces, mappings**
- ObjToLock: N/A
- Owned: N/A
- Contained: N/A
- ObjToLock: N/A
- **Linked Object Tool: action in sequence**



ii. List for data flows only

The list option will help to visualize only related calculations:

- IN = the data field is an input to the calculation
- OUT = the data field is an output of the calculation

Main Data | Material x Forecast Customer x Spec level - Demand Review Final

IN/OUT	Name	Description	Tags	Modified	Model	Execution type	Active	Rules	Calculation
IN	Export | 010. BW - Exported Data | 004. Dyna...			02/03/2022 14:28:13 PM	U99 - Export - OUT	Automatic	True	Multiple assignment (n -> n)	User defined
IN	Export | 010. BW - Exported Data | 001. Dyna...			02/03/2022 14:27:08 PM	U99 - Export - OUT	Automatic	True	Multiple assignment (n -> n)	User defined
IN	500. Main Data | Material x Forecast Custo...			03/03/2022 12:24:17 PM	y. GBU - AERO - DP	Automatic	True	Multiple assignment (n -> n)	User defined
OUT	500. Main Data | Material x Forecast Custo...			03/03/2022 10:15:44 AM	y. GBU - AERO - DP	Automatic	True	Assignment	User defined

Note: the different icons below tell us what the type of data fields is.

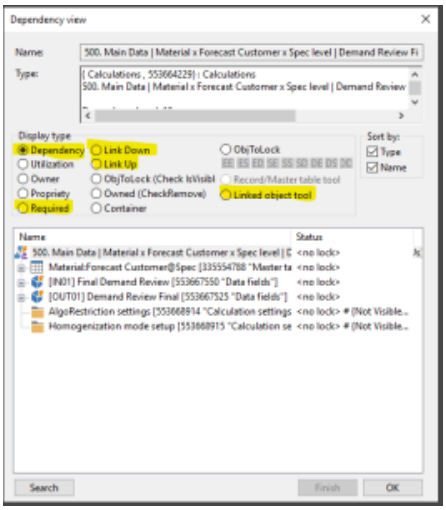
- The first one is blue: it means it is fed with a manual calculation and/or available for manual inputs;
- The second one is blue with a lightning meaning that it is fed with an automatic calculation (at least for partial selection).

2.2 Calculation

For calculations, either Dependency View or List works: it depends what you want to analyze.

i. Dependency View for complete analysis

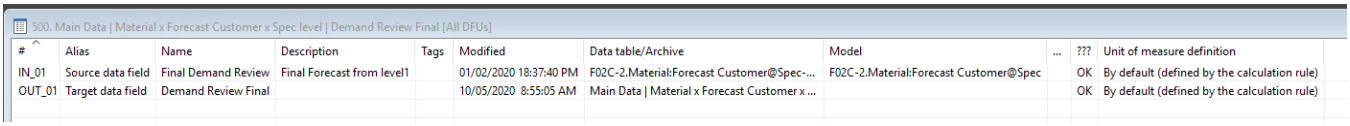
- **Dependency: inputs and outputs, dimension**
- Utilization: related model
- Owner: N/A
- Propriety: N/A
- Required: calculation rule
- Link Down: inputs and outputs
- Link Up: N/A
- ObjToLock: N/A
- Owned: N/A
- Contained: N/A
- ObjToLock: N/A
- **Linked Object Tool: link to shortcuts or sequences**



ii. List for data flows only

The list option will help to visualize only related data fields:

- IN_xx = the calculation is using the data field as source
- OUT_xx = the calculation is using the data fields as target.



#	Alias	Name	Description	Tags	Modified	Data table/Archive	Model	...	???	Unit of measure definition
IN_01	Source data field	Final Demand Review	Final Forecast from level1		01/02/2020 18:37:40 PM	F02C-2.Material:Forecast Customer@Spec-...	F02C-2.Material:Forecast Customer@Spec		OK	By default (defined by the calculation rule)
OUT_01	Target data field	Demand Review Final			10/05/2020 8:55:05 AM	Main Data | Material x Forecast Customer x ...			OK	By default (defined by the calculation rule)

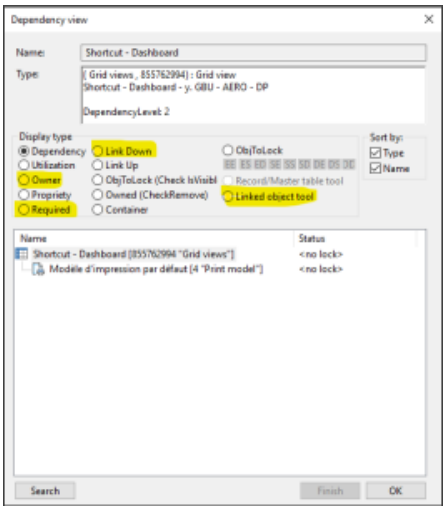
Note: the different icons below tell us what is the type of calculations.

- The first one is blue, with a purple person, red bottleneck, lightning : it is a extra automatic calculation, with filters.
- The second one is grey: the calculation is deactivated.
- The third one is blue with a lightning: it is an automatic core model calculation.
- The fourth one is blue: it means it is a manual core model calculation.

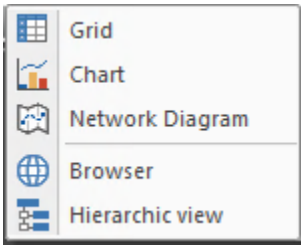
2.3 View

For Views, the only solution is Dependency View:

- Dependency: N/A
- Utilization: N/A
- Owner: linked model
- Propriety: N/A
- **Required: linked dimensions, conditions, data fields, UoM and conversions**
- Link Down: linked data fields, UoM and conversions
- Link Up: N/A
- ObjToLock: N/A
- Owned: N/A
- Contained: N/A
- ObjToLock: N/A
- **Linked Object Tool: linked to Web Workspace and/or shortcuts**



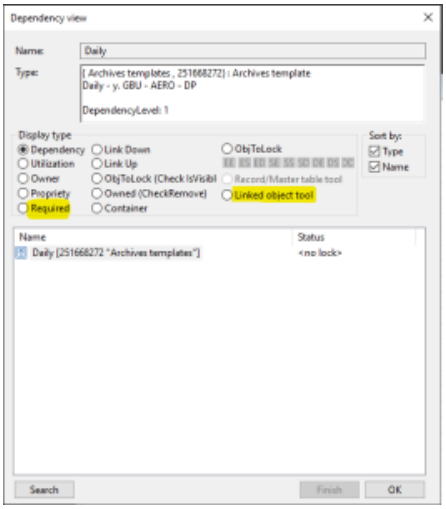
Note: the different icons below tell us what is the type of view.



2.4 Archives

For Archives, the preferred solution is Dependency View:

- Dependency: N/A
- Utilization: N/A
- Owner: N/A
- Propriety: N/A
- **Required: Dimension, related condition, linked data field, linked model**
- Link Down: N/A
- Link Up: N/A
- ObjToLock: N/A
- Owned: N/A
- Contained: N/A
- ObjToLock: N/A
- **Linked Object Tool: part of sequence**



Note: archives icon is identical to data field one but in purple.

2.5 Master Table

For Master Table, the preferred solution is List: it is possible to select and extract the whole list. It will give you all the related objects, classified by type.

Note: the different icons below tell us what is the type of master tables.

- The first one is a regular master table: fed by Interfaces or manually;
- The second one is a cross hierarchy: records are created by crossing data from other master tables.

2.6 Condition

For conditions, the preferred solution is List: it is possible to select and extract the whole list. It will give you all the related objects, classified by type.

Note: the different icons below tell us what is the type of conditions.

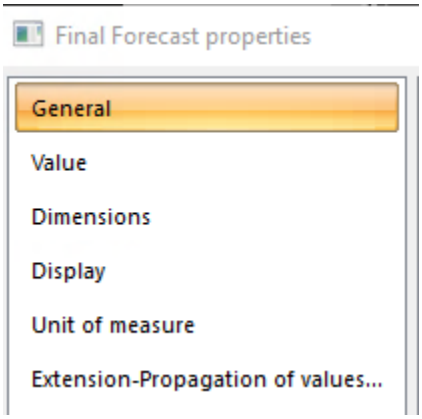
- The first one is a manual condition: fed by interfaces or manually;
- The second one is calculated automatically: with selection mask or specific rule.

3. Detailed Analysis by Object

3.1 Data field

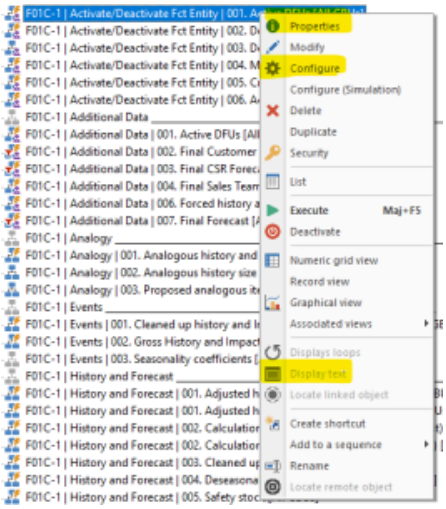
To analyze how a data field is configured, we go to Properties:

- General: Name, Description
- Value: type, default value, back up to server
- Dimensions: dimensions (selected on data table selection), aggregation and proration rules
- Display: digit precision, annotation
- Unit of Measure: UoM type and UoM selection
- Extension-Propagation of values: past and future period values



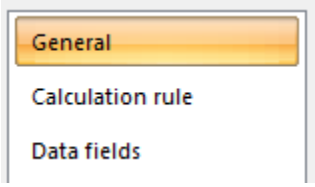
3.2 Calculation

To analyze how a calculation is configured, we go to Properties, Configure and Display Text if the calculation rule is a rule base.



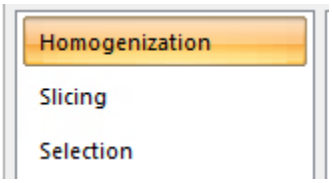
i. Properties

- General: Name, Description
- Calculation Rule: execution type, rule
- Data fields: inputs and outputs with dimensions and UoM homogenization



ii. Configuration

- Homogenization: N/A
- Slicing: N/A
- Selection: filter on related dimensions



iii. Display Text

By clicking on Display Text, a new window opens with the rule base.