PCSM: Excel with Strategy Management

PCSM User Group Webinar

PCSM User Group Webinar Series

Excel with Strategy Management

The Aim of the Webinar Series

- The PCSM webinars should help you to **become a confident PCSM user** managing your decision strategies in a safe and secure way.
- You will get insight into **best practices** on how to work in the best way possible with PCSM.
- Furthermore, you will learn about the **business value** of advanced functionalities and new features of new releases.

Your hosts

- Gottfried Steiner – Senior Business Consultant
- Rumi Pasaoglu – Business Solutions Analyst

For future webinars:

- Guest speakers – to be announced depending on content

Next Topics

- Understand PCSM building blocks
- Effective approaches to assure quality of your strategies
- How new PCSM features can help you

Share your thoughts - give feedback!

Please let us know which PCSM topics you would like to see covered. We will take this into account for planning the next Webinar sessions. Please submit your ideas and proposed topics via the **survey** to which you will be invited after the webinar.

You missed a webinar?

No Problem.

- The Webinar recordings and the presentations will be made available to you via the Webinar landing page:

  http://go.experian.com/PowerCurve-Webinars-CEE-2019

- Any issues with accessing the landing page?
  Please get in contact with

  federica.tasselli@experian.com

Any Questions?

Use the chat function during the Webinar

- Provide your questions and comments in the chat window.
- We will select the most frequent and most relevant questions and answer them at the end of the session.

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Top 10 Tips & Tricks to Master PCSM

April 17th, 2019

Top 10 tips and trick to master PCSM

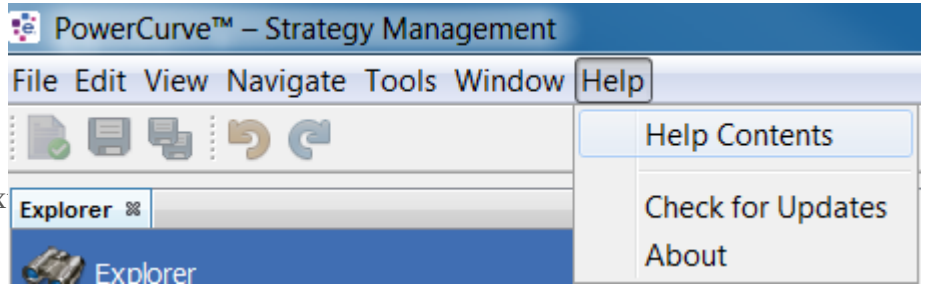
- ✓ **Help** – Get your PCSM questions answered immediately
- ✓ **Favourites** – Fast and easy access to frequently used components
- ✓ **Bookmarks** (pins) – Mark your areas of work to follow-up later on
- ✓ **Navigation** – Get an overview of the components used to build up an object
- ✓ **Where used** – Quickly find all places where a component or field is used
- ✓ **Draft splits** – Sketch a segmentation tree and fill in details later
- ✓ **Class set intervals** – Manage your changes on class sets
- ✓ **Validate** – Ensure technical correctness of your components and strategies
- ✓ **Test** (interactive) – Ensure the component is correct
- ✓ **Annotate** – Comment your components on the fly with sticky notes
- ✓ **Printable Doc** – Generate component and strategy documentation (e.g. in PDF)

#0 – HELP!

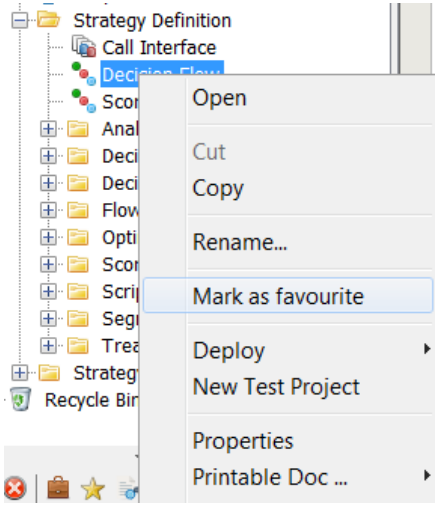
You want to know more about any feature or functionality in PCSM? Help! Help! Help!

Help explains in full detail how each functionality works and provides step-by-step instructions.

Use it frequently – it will help to solve many of your questions. Access it via the main menu bar.



#1 - Favourites



Marking a component as Favourite

You are in most cases always working on the same components? Mark them as your favourites and retrieve them quickly.

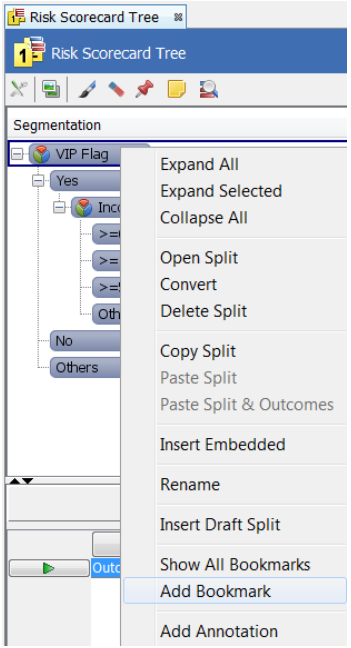
Any component can be marked as a favourite in the Explorer window.

Favourites can be viewed in one place by using the Explorer view bar, making them easier to locate. This means that the user can select components used on a regular basis as favourites.

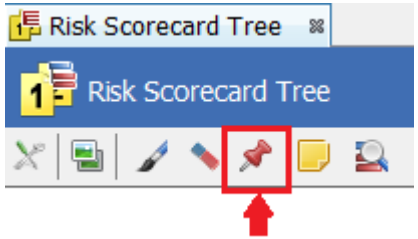
Marking a component as favourite helps locating the components in a quicker and simplier way.

Favourite view - Click on this icon from Explorer view bar to display only those components that the user has marked as favourite.

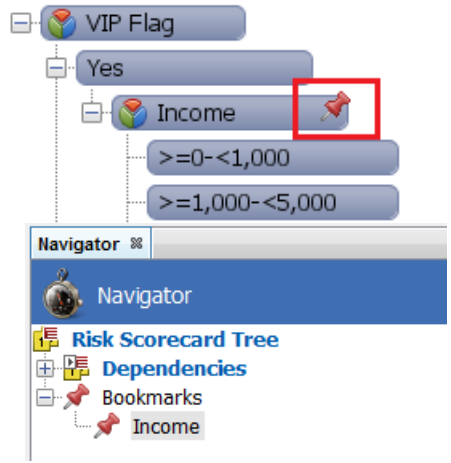
#2 – Bookmark (Pins)



Segmentation menu window



Component Toolbar



During a review you want to mark your places where you have revert to later on for changes?

Use Bookmarks to pin your work for easy retrieval later on.

Bookmarks can be added to split headers in the tree. When the contents of the tree are displayed in the Navigator, all the bookmarks are displayed separately.

Bookmark Pins can be added by either:

- *From Segmentation menu window*
- *From Component toolbar*

Clicking on a bookmark in the Navigator window will open the tree in the Tree editor at that point in the tree, giving the user quick access to a specific split header in the tree.

#3 - Navigation

Navigator window

If the Navigator window has been closed, it can be reopened at any time from Window option in the Main menu bar.

You want to quickly get an overview on which components are re-used in your component under consideration/change?

Use the Navigator to get a list of all used components and access to them.

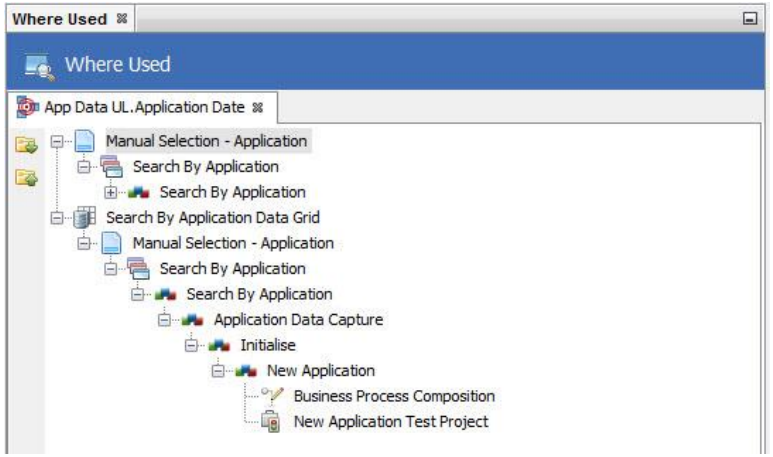
The Navigator window is housed in the Explorer area of the User Interface. By default on opening the software the Navigator window will be displayed on the left hand side of the interface beneath the Explorer window.

The Navigator window displays the contents of a selected component and its dependencies.

The Navigator window is populated when the user left clicks on a component in the Explorer window or when the user opens a component in the Main editor.

Components that have been moved to the Recycle Bin can also be viewed in the Navigator window.

#4 – Where Used



Where Used Window

Embedded components will not be displayed in the Where Used window.

You are not sure where/how a component is used and want to make sure to avoid unintended side effects?

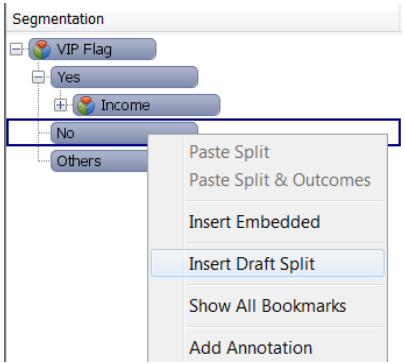
Where Used points you to all relevant objects.

Where Used displays all components that have references to a selected component or characteristic.

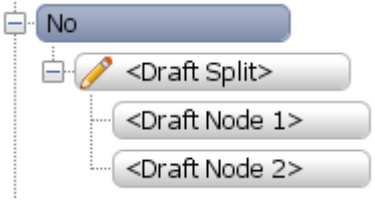
In large solutions with multiple users modifying content, a Where Used query can be used to carry out impact analysis to assess which components are referencing (and so may be affected by changes to) a given component, enabling the user to access them and synchronise changes.

For the components that have been moved to the Recycle Bin, the user can use the Where Used option to display all of the components that have references with the selected components.

#5 – Draft Splits



Insert Draft Split



Draft Split View

You have to introduce a new split in your segmentation tree, but the split component still need to be built?

Use Draft Splits to continue with building up your segmentation tree without interruption and replace them later with split objects.

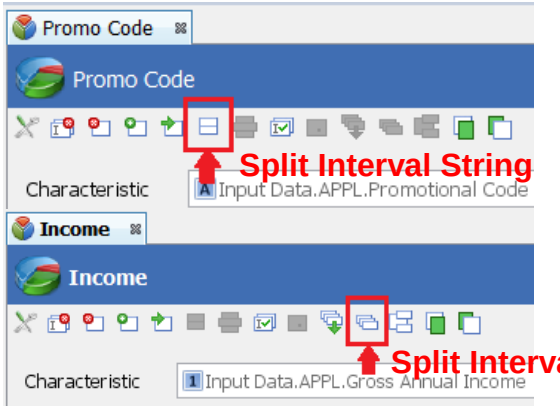
A Draft Split is a split that is not based on any pre-defined characteristic or rule, it is simply an outline of a split that could be created using a boolean expression, class set, matrix or segmentation tree.

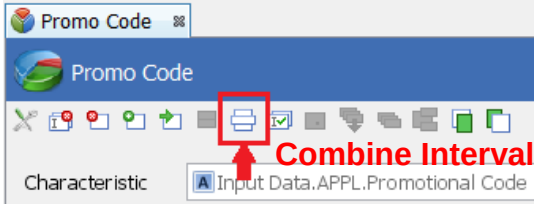
A draft split is created without the need for these characteristics to exist in your system.

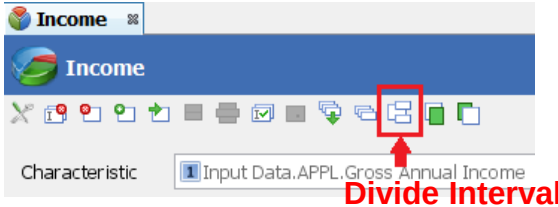
You can define the name of split headers and leaf nodes and add additional leaf nodes and draft splits as required.

A Draft Split can be added to other draft splits in the Segmentation tree.

#6 – Manage Class Sets







You often have to make changes to your existing class sets?

Use Class Set functionalities to make changes to your class sets faster and easier.

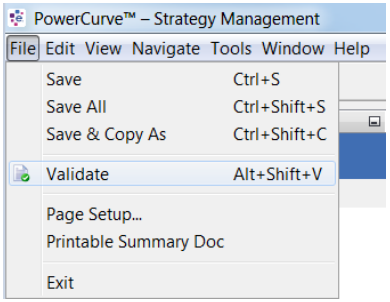
Split Interval – Split an existing interval into 2 or more. (String and Numeric Fields)

Combine Interval – Combine two or more intervals into a single one. (String Fields)

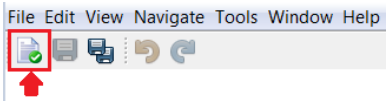
Divide Interval - If you have an interval with a numeric range it is possible to divide this interval into multiple intervals each with the same width. If the selected width does not allow the operation to be performed evenly then the width of the last interval will be smaller to fit the original interval width. (Numeric Fields)

The class set editor uses the ranges of the original interval to produce the names for the new intervals.

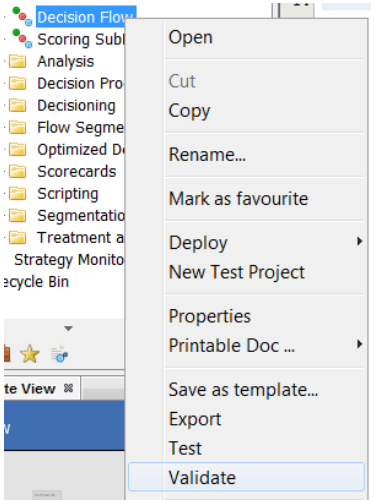
#7 – Validate



From the Main menu



From the Main toolbar



In the Explorer window

You are not sure if your components are technically correct?
Use Validate before each test run and each deployment.

Validation is a service that carries out a check on the technical validity of a Solution, a Folder or a Component and its contents.

Validation will then call the publishing/references service to make sure that there are no broken references or missing publishing rules within.

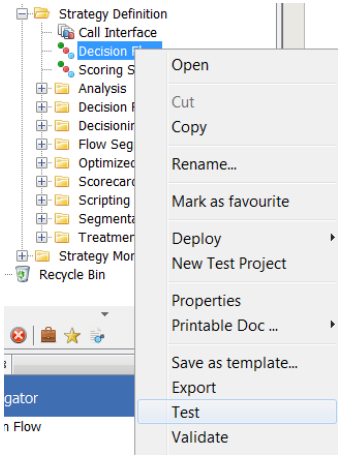
Validation can be done in different ways;

- *From the Main menu*
- *From the Main toolbar*
- *In the Explorer window*

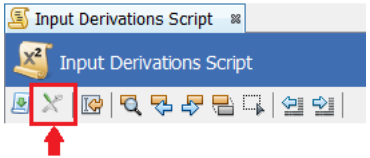
The user may validate a component from the Main menu and from the Main tool bar.

Validation on a Solution or a Folder must be carried out from the Explorer window.

#8 – Test (Interactive, Component)



In the Explorer window



From Component toolbar

You want to ensure that you did a correct implementation/change of your object or strategy?

Use Test to check if you get expected results and understand how the component works.

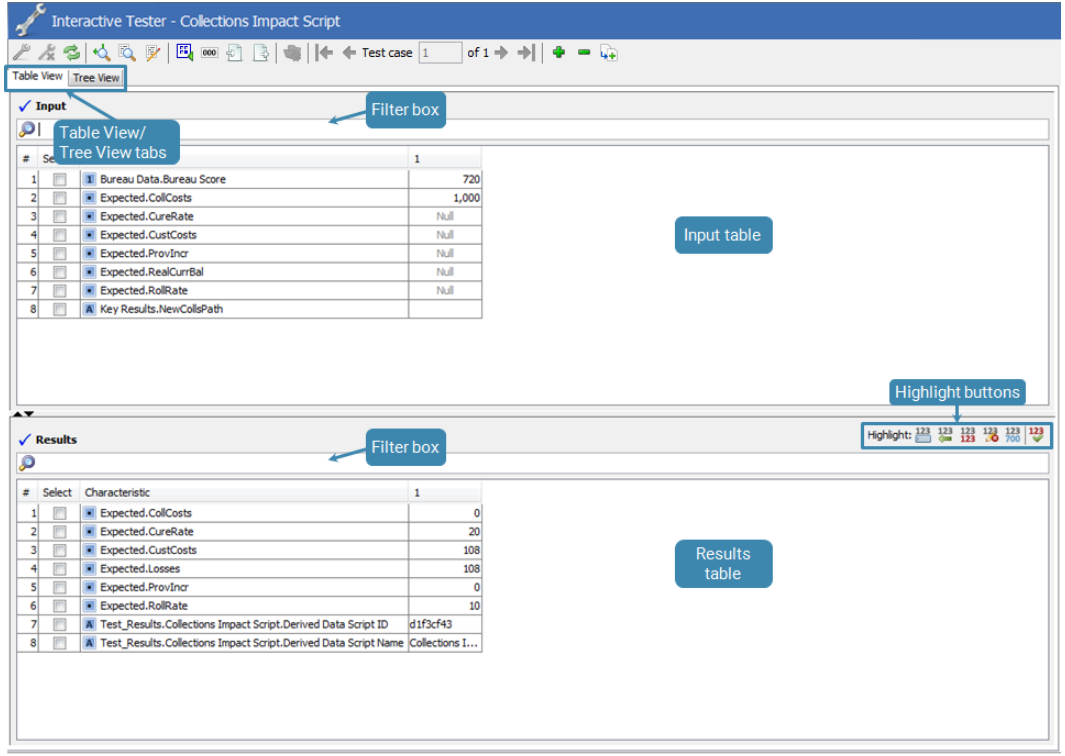
The Interactive Tester enables users to execute test cases manually on a component or a number of components. Users can define and test a component and review the results; if a user has activated the Tester from within the component editor, it allows users to make the appropriate changes to the component and re-test it without having to close the component editor, as the Interactive Tester is a separate editor.

Testing can be done either:

- *In the Explorer window*
- *From the Component toolbar*

Test cases are manually entered or imported into the Interactive Tester editor, where they can be reviewed and edited. They are then executed against the selected component(s) and can be compared with previous values or against expected results.

#8 – Test (Interactive, Component)



Interactive Tester editor

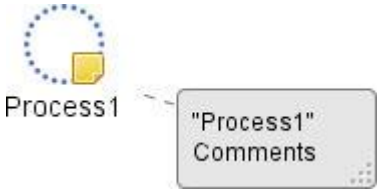
There are two types of views for Input Data in the Interactive Tester editor:

- **Table View** - displays flat data models containing static and dynamic arrays where the characteristics are listed with their full path names.
- **Tree View** - displays data models containing static and dynamic arrays where the characteristics are displayed under their respective parent element and modify the model structure by adding dynamic array elements.

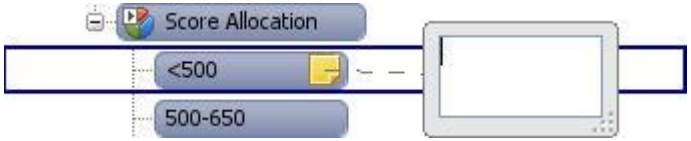
Results Table: The Results Table is populated with output characteristics and test cases containing values obtained as a result of testing.

The Results Table contains the same columns as the Input Table. The Results values are read only.

#9 – Annotate



Annotation on a node in decision process flow.



Annotation on a node of segmentation tree.

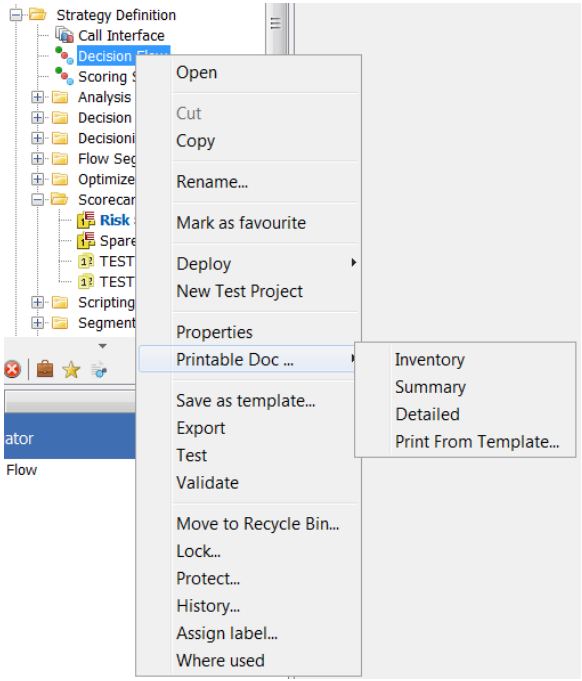
You wonder what you or your colleague had in mind when building or changing some parts of the strategy?

Annotate helps you to remember and understand quickly!

Annotation can be added to any node in the decision process flow or within the editor as "floating" annotation, or to any node of segmentation tree and is used to provide additional information to the user without affecting the functionality.

When annotation has been applied and is hidden the user can move their mouse over the annotation icon in the editor and the information contained it will be displayed as a tool tip.

#10 – Printable Doc …



Generate Printable Document

You are asked to share some components with your colleagues or other departments, but they have no access to PCSM?

Generate documents via Printable Doc … and distribute them e.g. as PDFs.

The user can produce an Inventory, Summary, Detailed or Print From Template printable document from the software and Save the document in PDF format.

- **Inventory** printable document contains the selected component; giving the Component type, Component name, Shared revision, User revision, Modified status, Update date and time and the Last author.
- **Summary** printable document contains the selected component; giving Component name, Shared revision, User revision, Type, Modified status, Updated date and time and the Last author. The printable document will also contain details of the selected component's contents.
- **Detailed** printable document containing the selected component; giving Component name, Shared revision, User revision, Type, Modified status, Updated date and time and the Last author. The printable document will also contain details of the selected component's contents. It will also include details of the referenced and embedded content.

Even though most used format is PDF, the printing output type can be PDF, MS Office, HTML document or a physical printer.

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