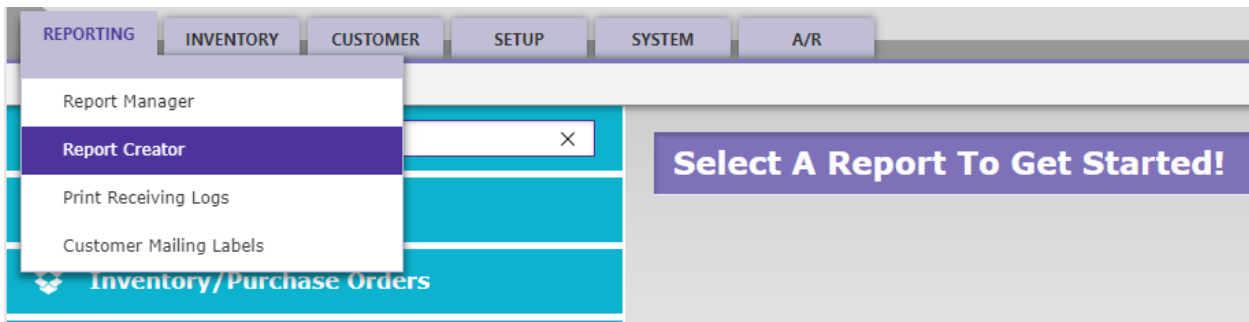


# Exporting Data Out of RICS

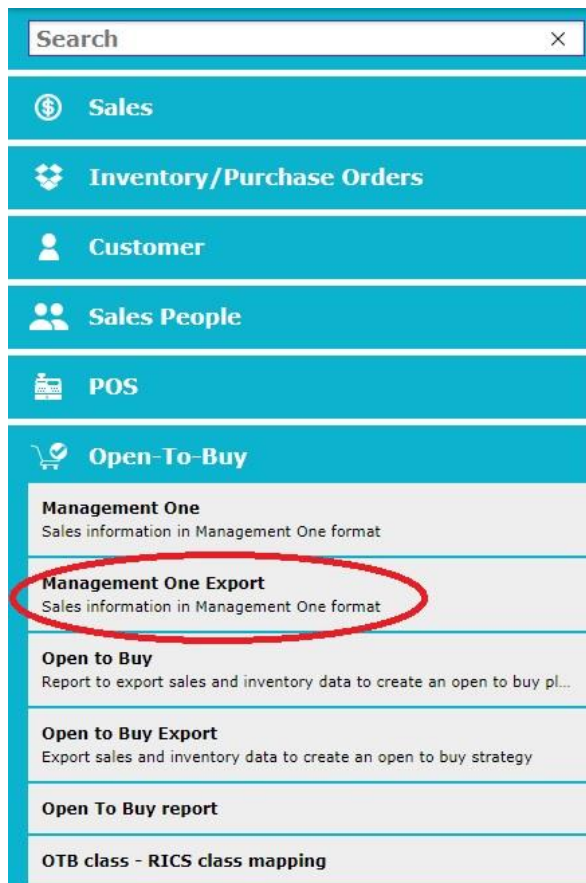
This document outlines how to export RICS to a format that can be uploaded to Retail Orbit. This document assumes that you have already completed the OTB Setup and Class Mapping found in Setup>Manage Stores>OTB Setup.

## Running the RICS OTB Export Report

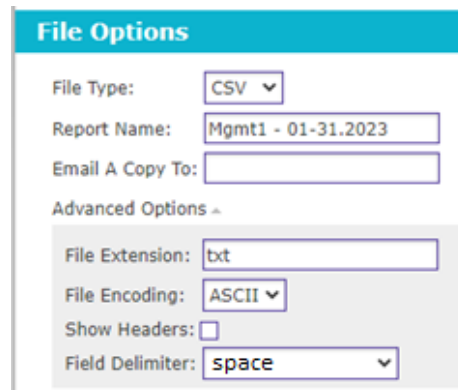
To get started, you will need to go to Reporting>Report Creator as shown below:



From this list of reports you will see that there is an Open-To-Buy option, and if you click on that you will see a report called Management One Export (see below-left):



When you click the Management One Export report, report options will appear on the right-hand side. Give the report a name that makes sense to you (usually recommended to include the date of the export so that you know what data it includes). Under the File Type Options, it should be left as CSV, however, you will need to click **advanced** options so that you can make sure that the file extension is set to txt, and the field delimiter is set to Space. When the File Options are correct, it should look similar to the image below:



Next you will need to set the report options to the date range that you are running the report for. If you were running a report for the current month, you could select "Month To Yesterday" from the Report Period drop-down menu. You can also choose "Selected Dates" if you want to set the time period manually. Warning: You should not have a date range span over multiple periods. This report is meant to generate one file per period, so if you needed to run a large group of time, it should be broken up into separate files per period (i.e. one file for January 1 – 31, and a second file for December 1-31, as these would be the January and December period files). Here is an example of a report being run for the January 2023 time period:

### Report Options

*What period would you like to analyze?*

Report Period:

From  to

Once you have all your settings set, simply click the "Run" button at the bottom of the screen and RICS will generate a report in a format that is uploadable into Retail Orbit. If you want a copy emailed to you when it runs, you can enter an email in the box labelled "Email A Copy To:" in the file options area of the report settings.

The screenshot displays the RICS report generation interface. On the left is a navigation sidebar with the following items: "Management One Export" (Sales information in Management One format), "Open to Buy" (Report to export sales and inventory data to create an open to buy pl...), "Open to Buy Export" (Export sales and inventory data to create an open to buy strategy), "Open To Buy report", "OTB class - RICS class mapping", "File Printouts", and "A/R Reports". At the bottom of the sidebar are "Run" and "Clear" buttons. The main content area is divided into two sections: "Report Options" and "Report Criteria". The "Report Options" section contains the question "What period would you like to analyze?", a "Report Period:" dropdown menu set to "Selected Dates", and a date range "From 1/1/2023 to 1/31/2023". The "Report Criteria" section includes "By Store:" with a "Store Code(s)" input field and an "Exc" checkbox, and "By Store State:" with an "Enter Organization States" input field and an "Exc" checkbox.

If you want a copy emailed to you when it runs, you can enter an email in the box labelled "Email A Copy To:" in the file options area of the report settings. Otherwise the report will generate in, and be accessible by, RICS reporting (in the Report Manager). When the report has completed it should be a text file with Client Code, Class Codes, Period, and Data all separated by a space. The final file should look something like this:

```
ORB999 105 1 2301 1201 -4955 78230 0 0 7014 14480 9444 1015 1040 140 66 RICSSoftware 0 0 0 0 0 0 1
ORB999 105 1 2301 0 0 0 145 300 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
ORB999 105 1 2304 0 0 0 1602 3310 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
ORB999 105 1 2305 0 0 0 1643 3540 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
ORB999 115 1 2301 174 -940 36750 0 0 2965 6070 2366 160 90 4420 2237 RICSSoftware 0 0 0 0 0 0 1
ORB999 115 1 2302 0 0 0 124 225 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
ORB999 125 1 2301 30 -2445 29529 0 0 775 1725 2135 70 1475 0 0 RICSSoftware 0 0 0 0 0 0 1
ORB999 125 1 2304 0 0 0 495 1045 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
ORB999 205 1 2301 2370 6935 84795 0 0 7981 16600 17370 2530 1000 320 161 RICSSoftware 0 0 0 0 0 0 1
ORB999 205 1 2301 0 0 0 106 220 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
ORB999 205 1 2302 0 0 0 290 600 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
ORB999 205 1 2304 0 0 0 2643 5460 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
ORB999 205 1 2305 0 0 0 1468 3160 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
ORB999 215 1 2301 46 560 27330 0 0 869 1720 5179 290 140 170 86 RICSSoftware 0 0 0 0 0 0 1
ORB999 225 1 2301 150 -2394 18363 0 0 0 2500 85 2512 0 0 RICSSoftware 0 0 0 0 0 0 1
ORB999 300 1 2301 1475 -4400 80379 0 0 1651 3500 8078 820 4810 0 0 RICSSoftware 0 0 0 0 0 0 1
ORB999 300 1 2302 0 0 0 62 120 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
ORB999 300 1 2303 0 0 0 2399 5060 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
ORB999 300 1 2304 0 0 0 1212 2530 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
ORB999 310 1 2301 7 -740 10455 0 0 0 228 0 0 0 0 RICSSoftware 0 0 0 0 0 0 1
ORB999 310 1 2303 0 0 0 1204 2590 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 2
```

Should you experience any issues, or just want to test that your export is working, please reach out to the support team by emailing us at [support@retailorbit.com](mailto:support@retailorbit.com). Or if you'd prefer, please feel free to book a shuttle support appointment by going to [retailorbit.setmore.com](http://retailorbit.setmore.com) to book a day/time that works best for you, and we would be happy to have a look at this with you.