QAD Enterprise Applications
Enterprise Edition

Training Guide

Demand Management 6.1 Planning Portal

70-3251-6.1
QAD Enterprise Applications 2012
Enterprise Edition
February 2012

DemandManagementPlanningPortal_TG_v6.1.pdf/m3w/mdf

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Contents

Change Summary

The following table summarizes significant differences between this document and the last published version.

Date/Version	Description	Reference
February 2012	Demand Management 6.1 Planning Portal TG Initial Publication	

About This Course

Course Description

QAD designed this course to cover the basics of preparing to set up and use the QAD Demand Management (DM) program. The course includes hands-on activities and exercises that allow students to practice key concepts and processes in DM.

Course Objectives

By the end of this class, students will:

- Understand the importance of Demand Management in a business enterprise
- Recognize the impact of forecast errors on inventory levels and customer service
- Analyze some key business decisions before setting up DM
- Determine business requirements for setting up and using DM
- Understand the relationships of components in the DM program & Planning Portal
- Set up DM to best match the business rules of an organization

Audience

- DM technical support
- Appropriate business managers
- Implementation consultants and members of implementation teams
- Key end users

Prerequisites

- Demand Management User Learning Path
- Practical Guide to Business Forecasting (available April 15, 2012)

Course Credit and Scheduling

QAD designed this course to take 32 hours.

System Requirements

This course uses the QAD Enterprise Applications Enterprise Edition database. See the title page for the exact database title. Whether you are studying this material in a classroom or as a self-study exercise, this is launched in a virtual environment management system. QAD instructors will prepare classroom environments. If you encounter questions or problems on QAD software that are not addressed in this book, several resources are available.

Virtual Environment Information

Enterprise Edition 2011 Add-Ons r02, 10USACO

QAD Resources

If you encounter questions or problems on QAD software that are not addressed in this book, several resources are available.

Product Help

All QAD products ship with integrated help systems. A properly installed QAD application will display help when you press the Help key (F1), or access it through the menu. The help covers the normal use of the product.

QAD Web Resources

The QAD website provides product and company overviews. The Print Solution option on the opening page provides a means of compiling desired content into a document specialized to your industry, business implementation, and needs.

http://www.qad.com/

From QAD's main site, you can access QAD's Learning or Support sites.

QAD Learning Portal for Training Opportunities

To view available training courses, locations, and materials, use the QAD Learning Portal. Choose Learning under the Global Services tab to access this resource.

QAD Support for Product Documentation and the QAD Knowledgebase

To access release notes, user guides, installation and conversion guides by product and release, visit the Support website. Support also offers an array of tools depending on your company's maintenance agreement with QAD. These include the Knowledgebase and direct links to QAD Support experts.

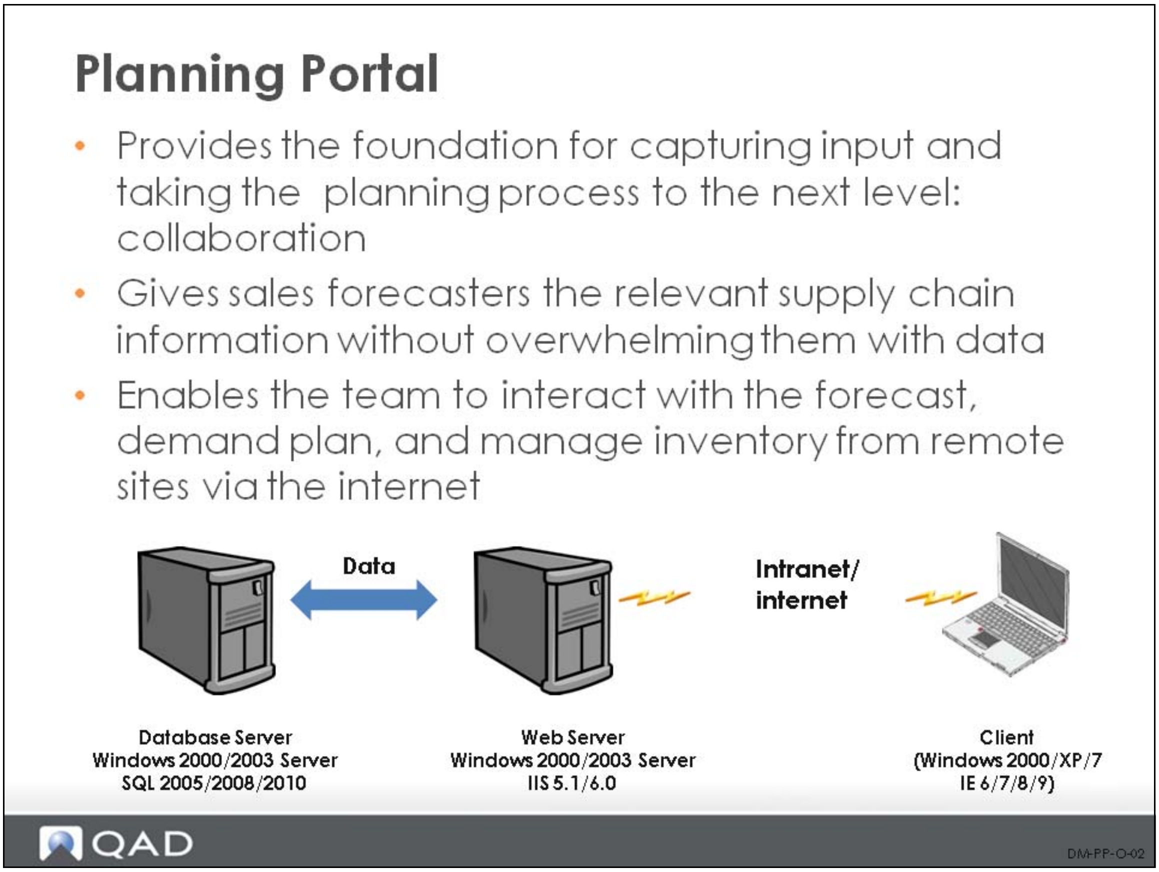
Choose Support under the Global Services tab.

Any QAD customer can register for a QAD web account by accessing the Support web site and clicking the Accounts link at the top of the screen. Your customer ID number is required. Access to certain areas is dependent on the type of agreement you have with QAD.

Chapter 1

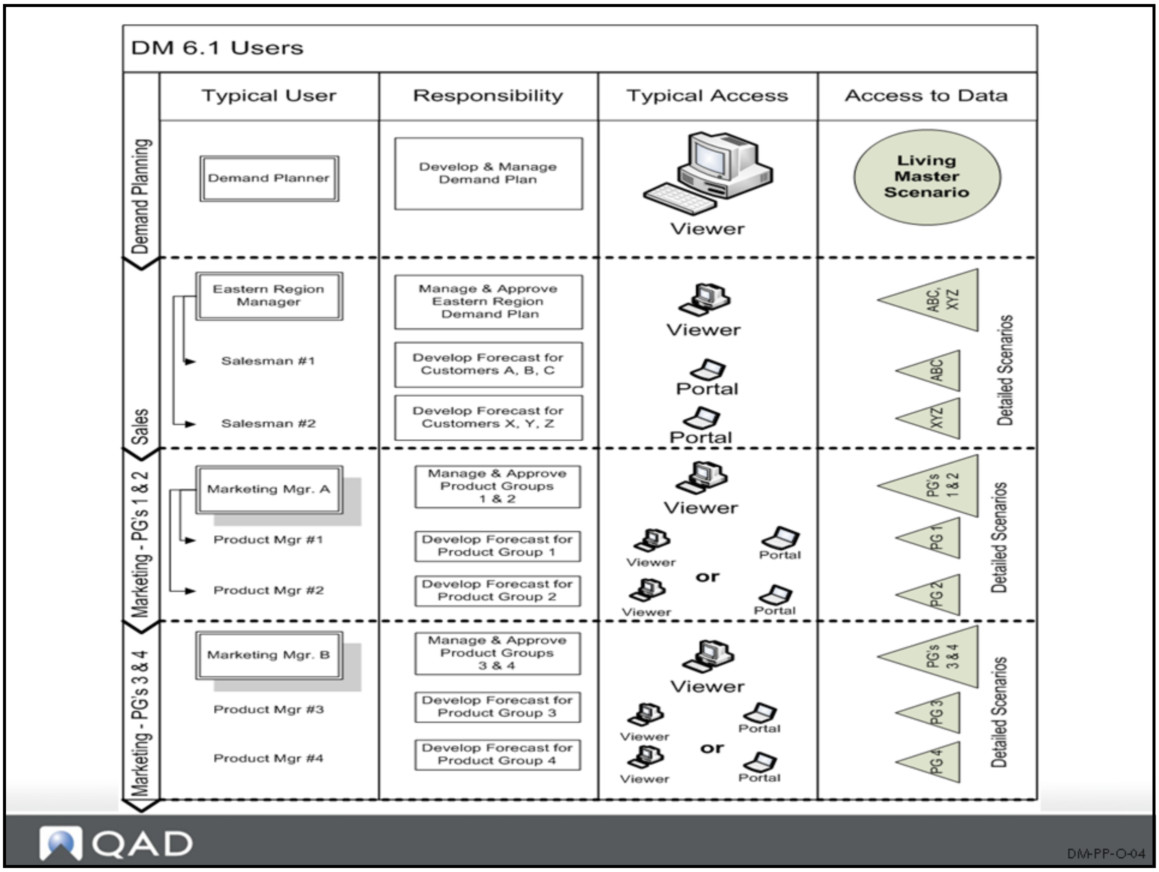
Planning Portal Overview

Planning Portal



Meet With Customers

DM 6.1 Users



Typical Users – Demand Planners, Sales Forecasters, Materials Managers, Supply Chain Managers.

- Responsibility – prepare & manage forecasts and forecasting process
- Typical System Access – Viewer
- Data Access – Living Master

Typical Users – Sales Managers, Marketing Managers, Regional Sales & Marketing Managers, Key Account Managers.

- Responsibility – manage and approve forecasts for their areas of responsibility
- Typical System Access – Viewer
- Data Access – Detailed Scenarios of their areas of responsibility

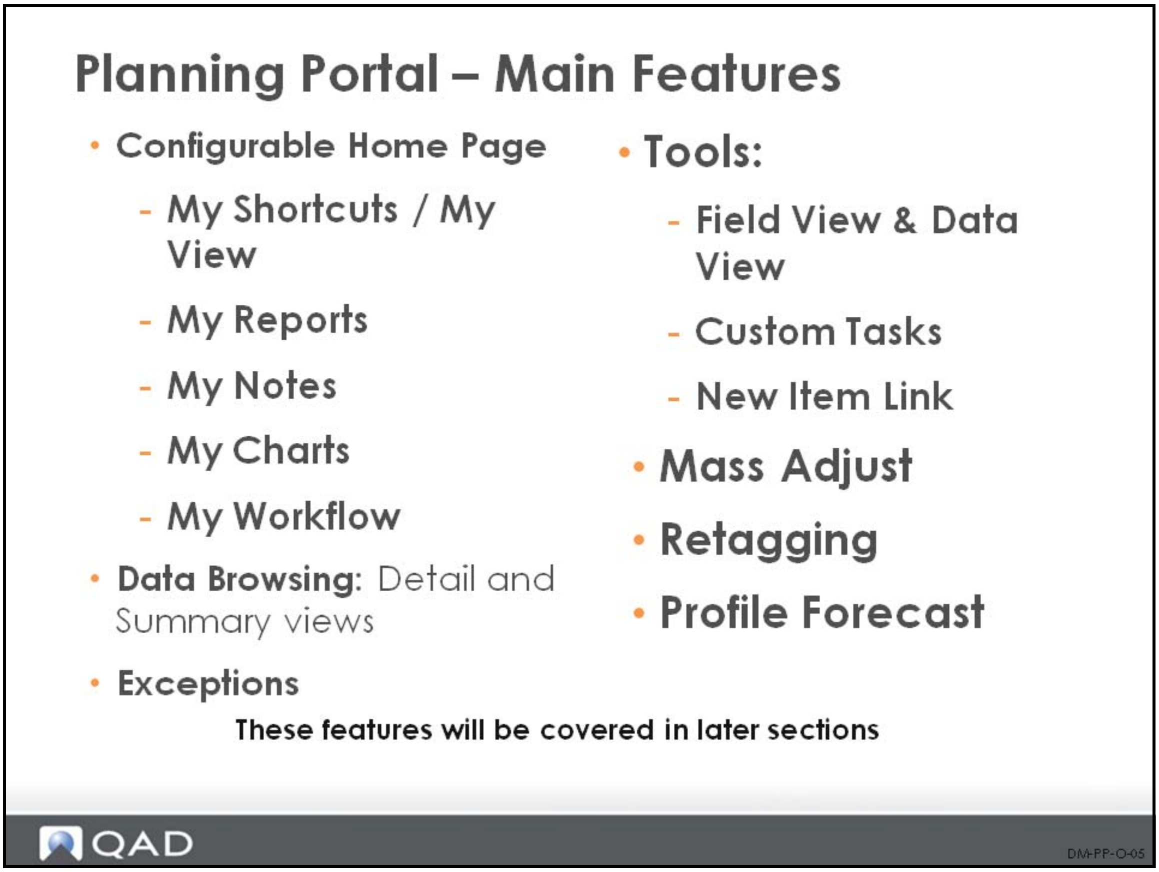
Typical Users – Field Sales, Product Managers, New Product Managers.

- Responsibility – input business intelligence including customer forecasts, promotional calendar, new product introduction schedule for their areas of responsibility
- Typical System Access – Portal or Viewer
- Data Access – Detailed Scenarios of their areas of responsibility

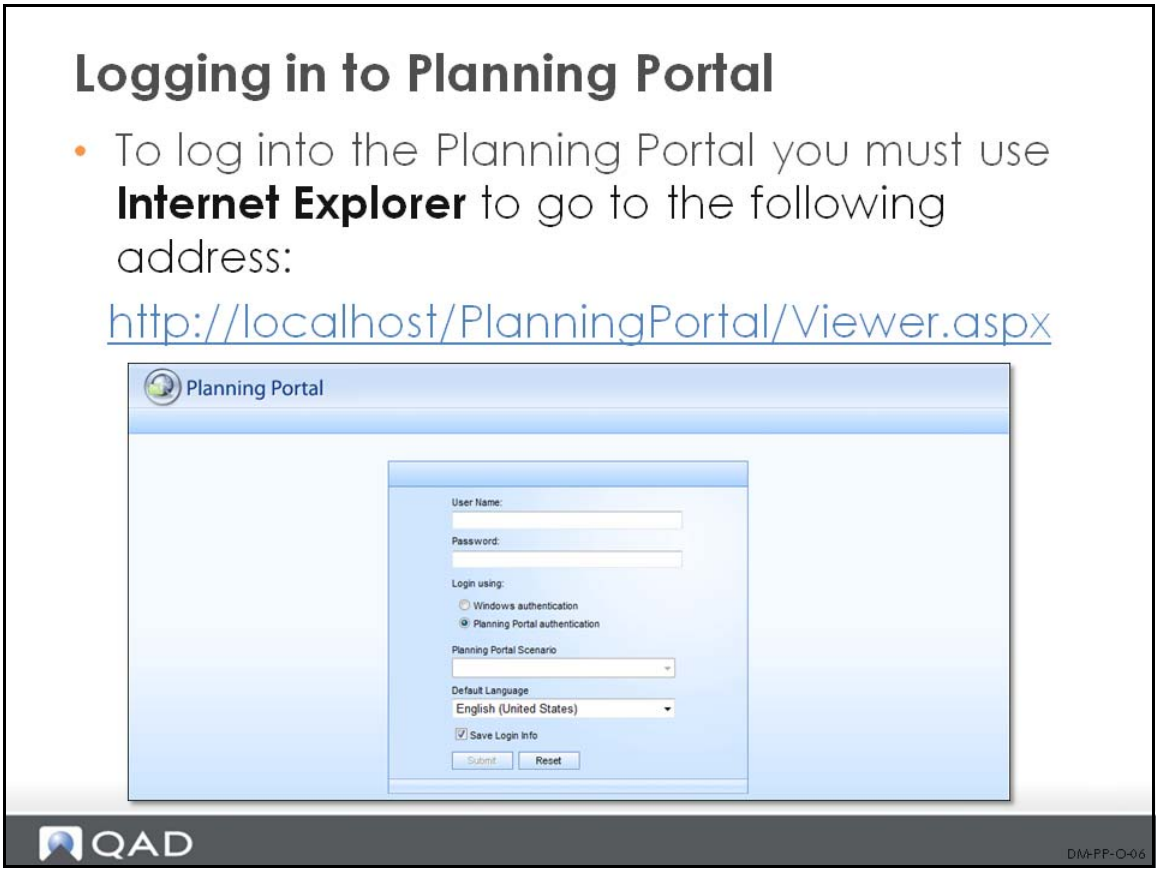
Typical Users – Customers.

- Responsibility – input collaborative customer forecasts
- Typical System Access – Portal
- Data Access – Detailed Scenarios of their company

Planning Portal – Main Features

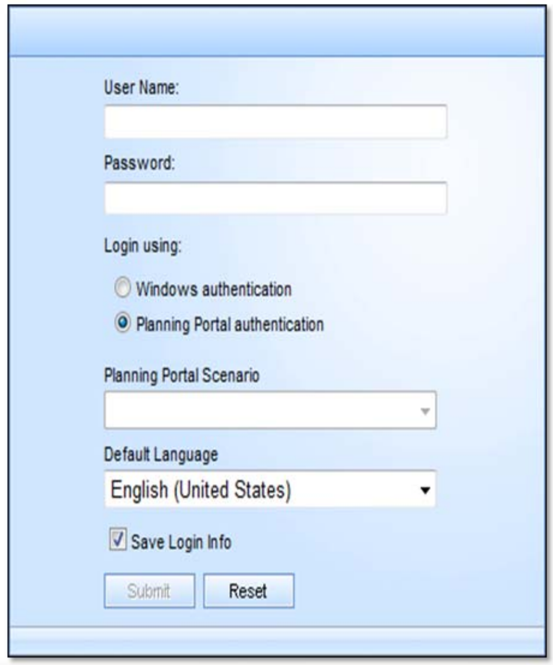


Logging in to Planning Portal



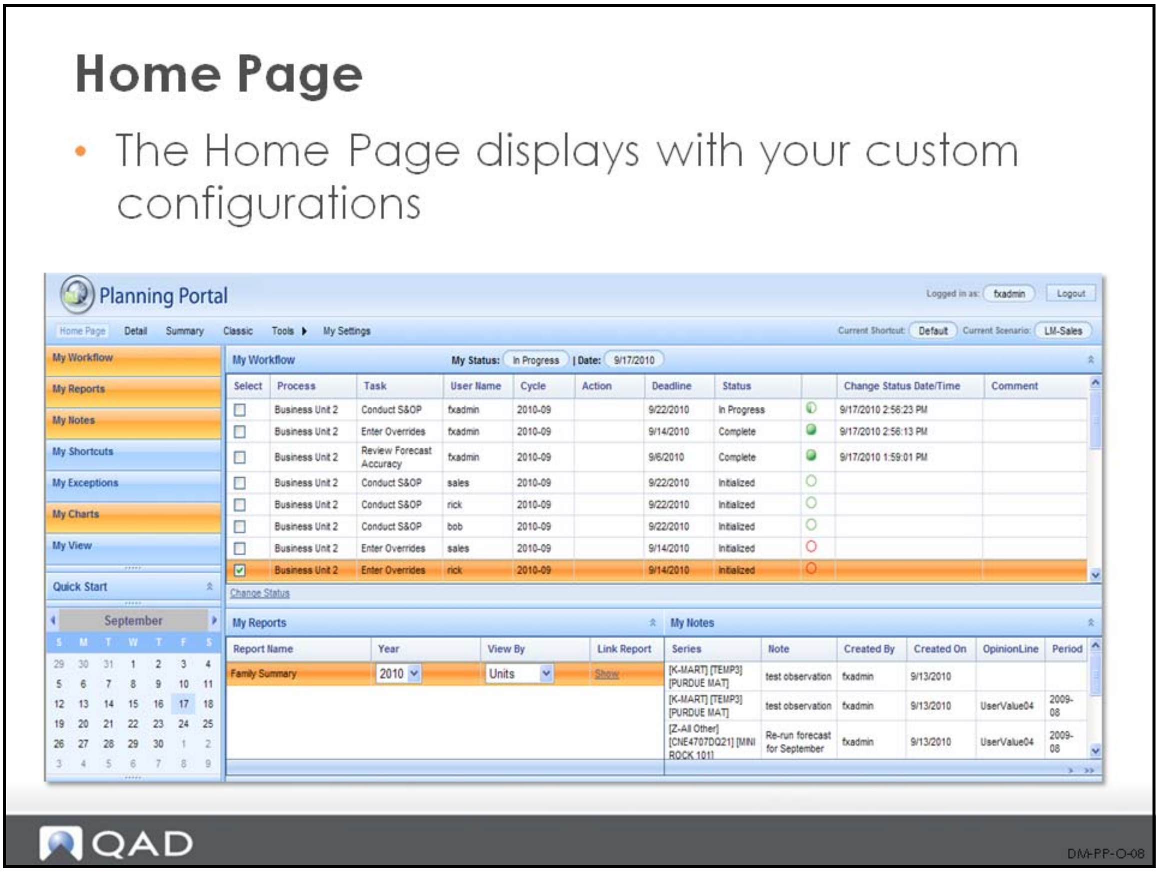
Logging in to Planning Portal

- You can log in using either your **PP User Name and Password** or your **Windows account authentication**
- Select the **Scenario** to use with your account from the drop-down list
- Select the **Default Language** to use in the Planning Portal interface
- Click **Submit** to enter the Planning Portal



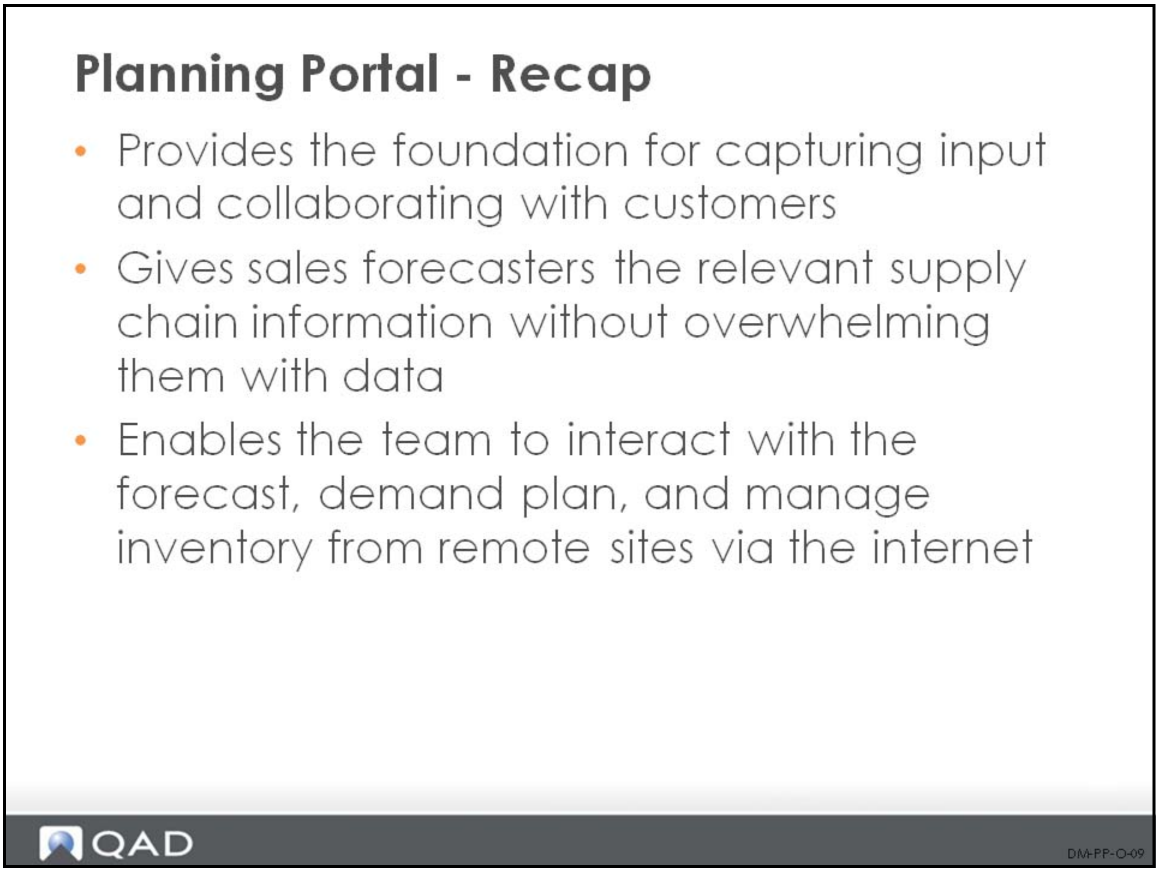
QAD DM-PP-O-07

Home Page



For more info on the panels and data displayed on the Home Page, please refer to the PP03 Home Page training module. For more information on customizing the Home Page, refer to PP02 My Settings training module.

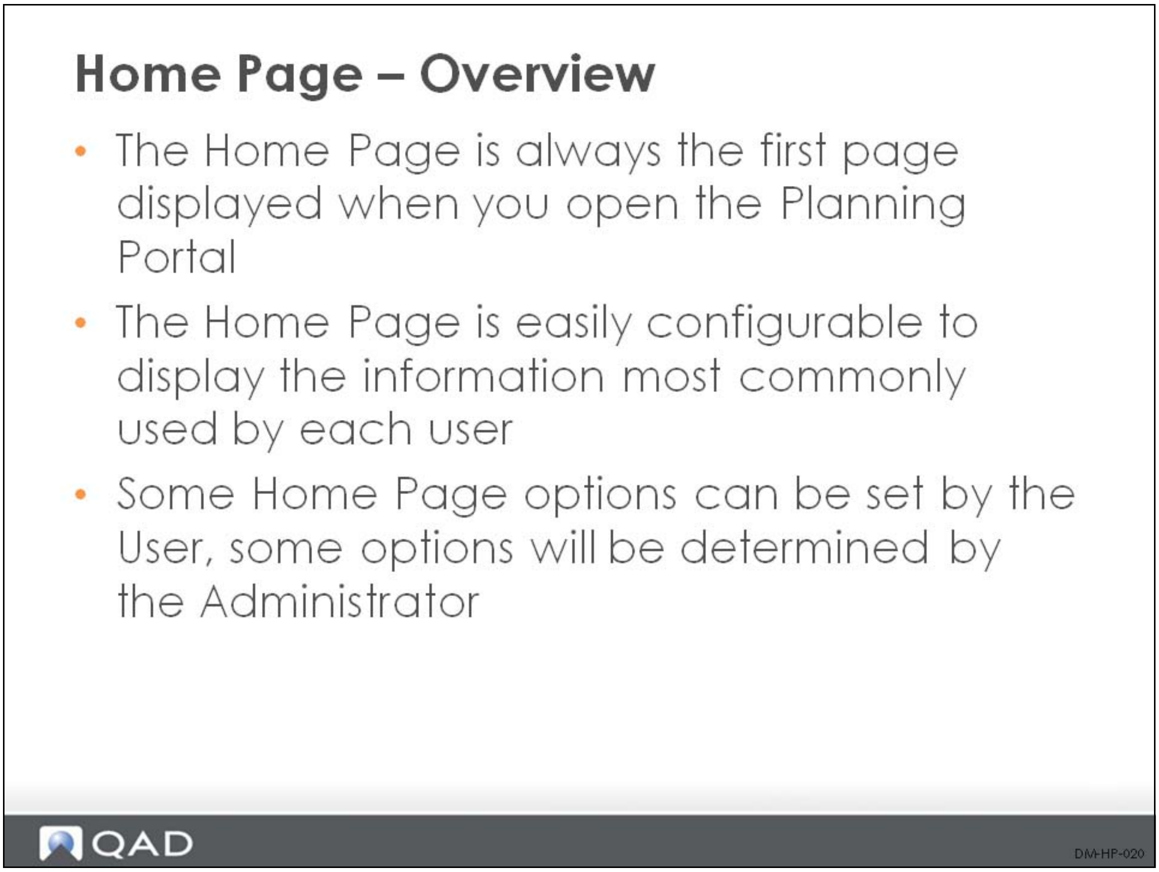
Planning Portal - Recap



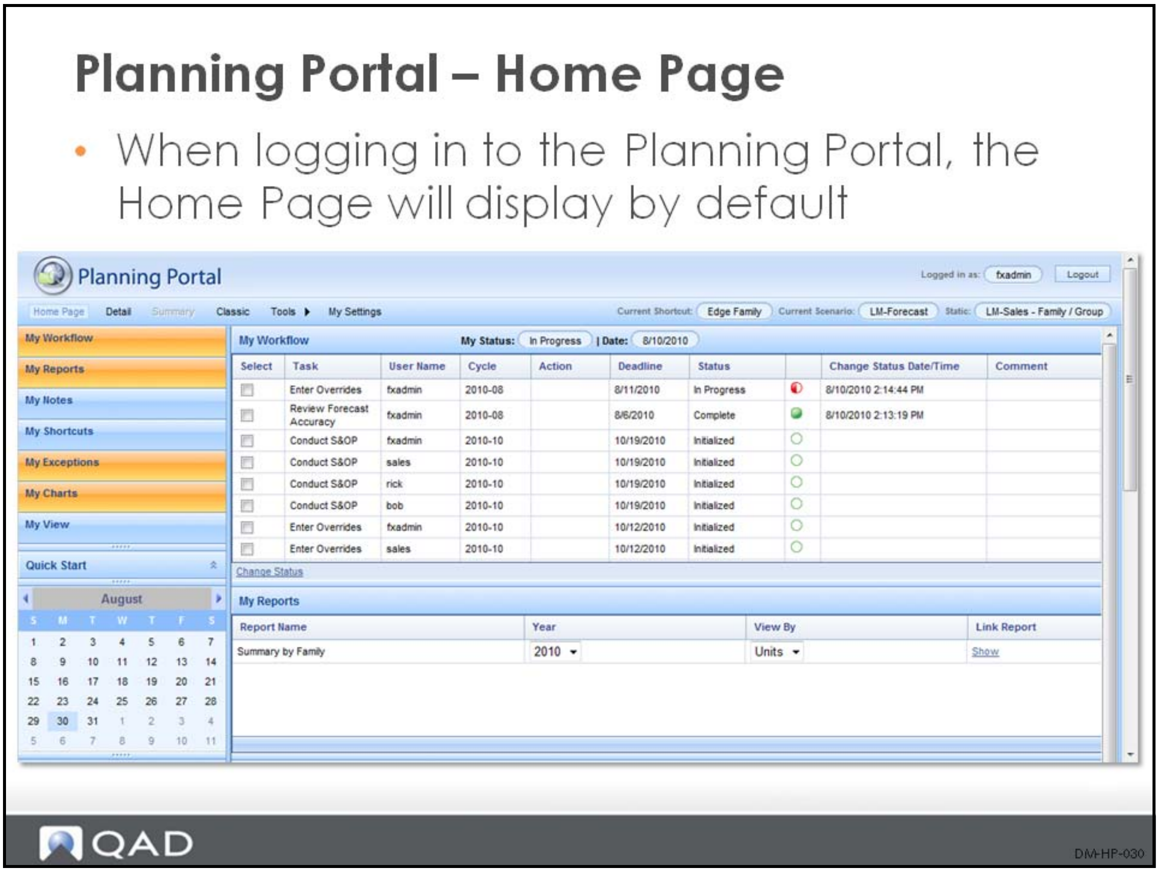
Chapter 2

Home Page

Home Page - Overview

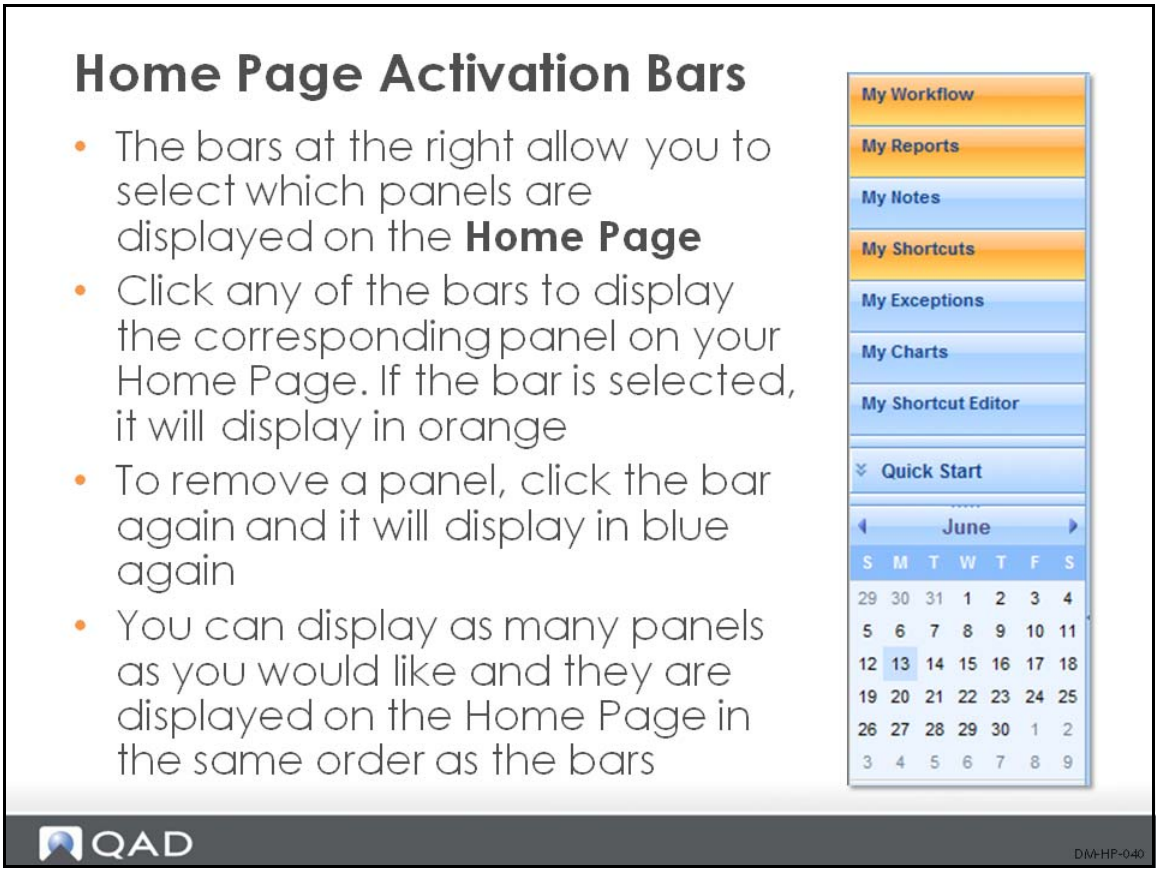


Planning Portal – Home Page

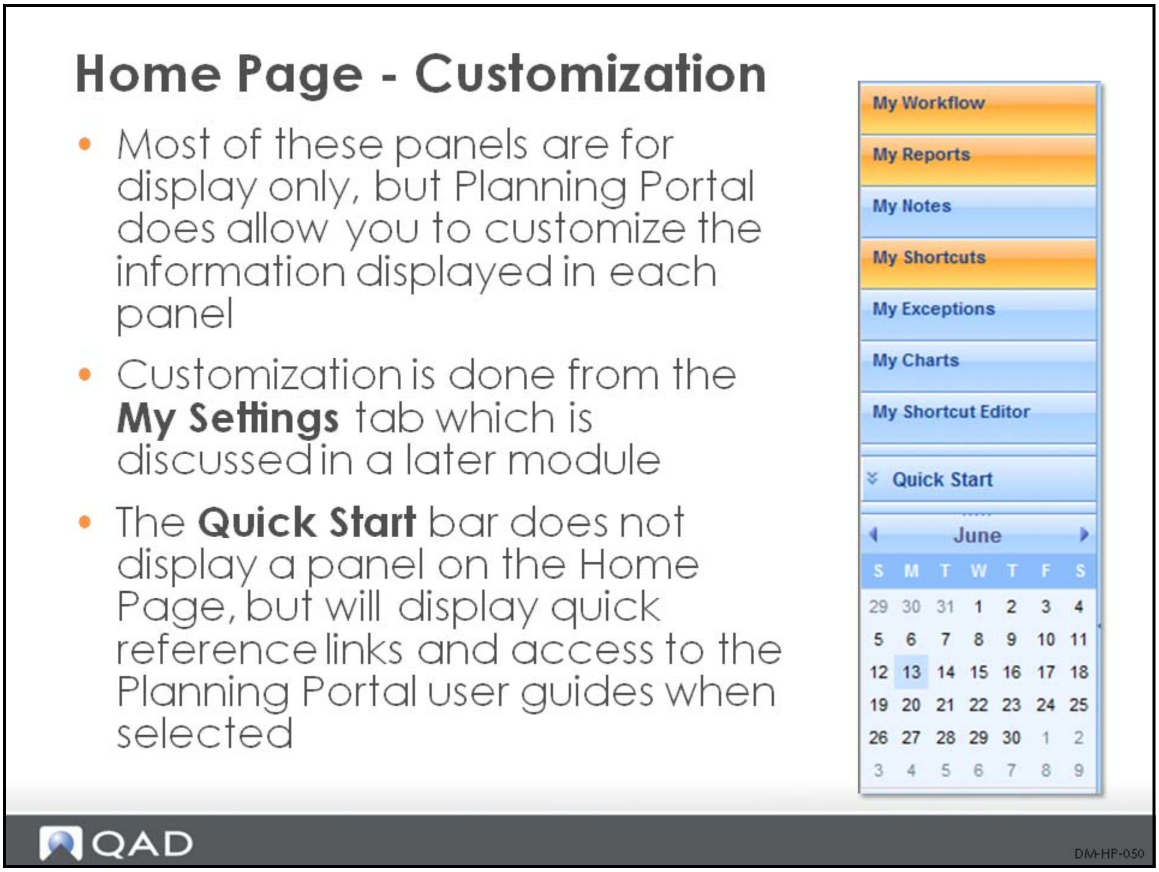


The Home Page can be customized using the buttons on the left to indicate the panels to display. Selected panels display in orange.

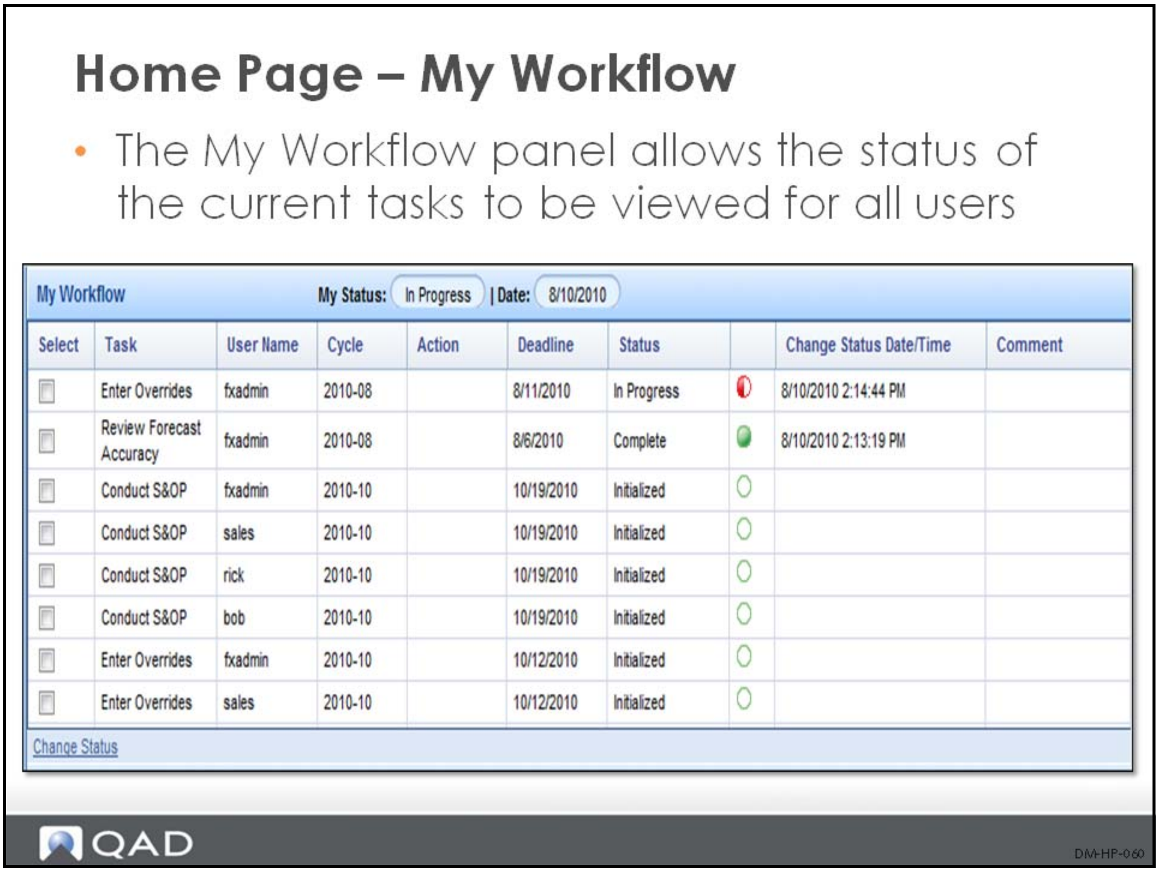
Home Page Activation Bars



Home Page - Customization

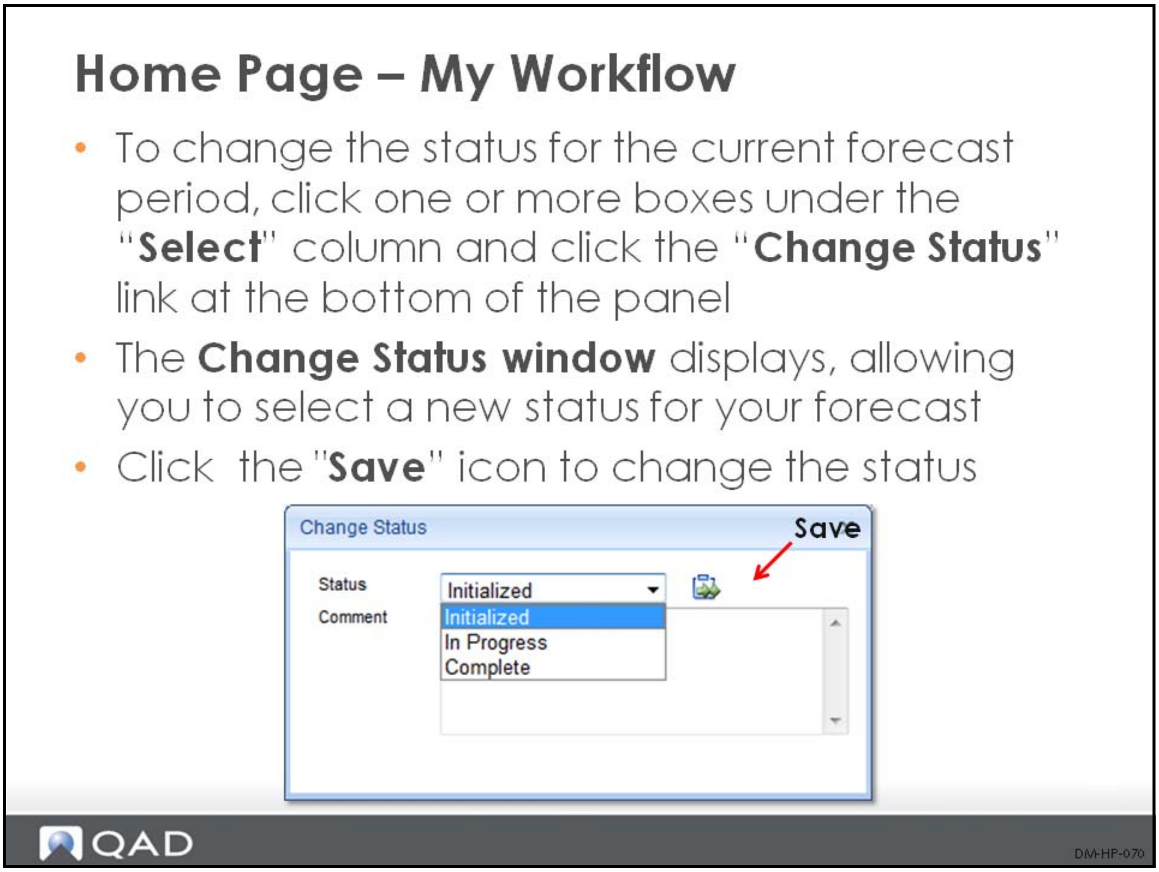


Home Page – My Workflow



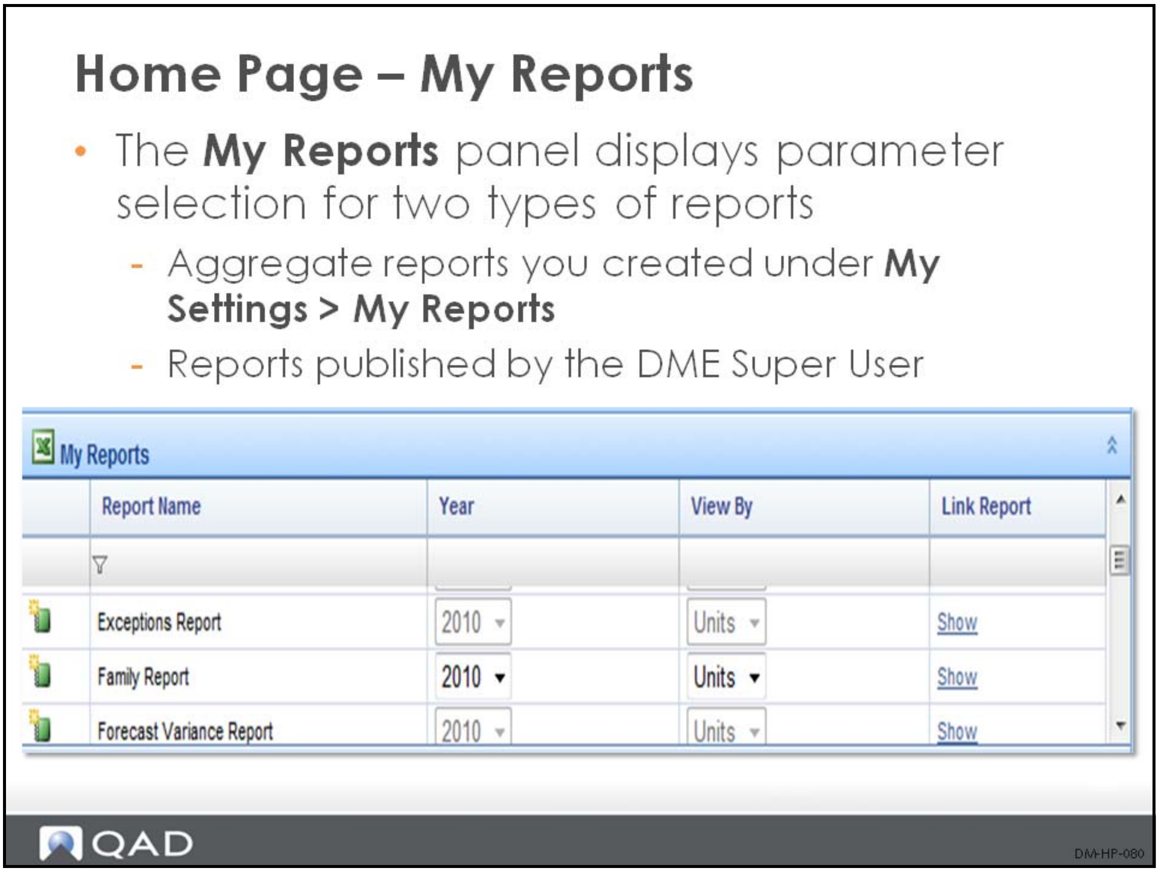
If all the available users cannot be viewed in the panel, click the linked number in the bottom right corner of the panel to view the next page.

- The toolbar shows the status for the current user
- The status options available and permissions to view other users' status are configured in the Planning Portal Admin tool



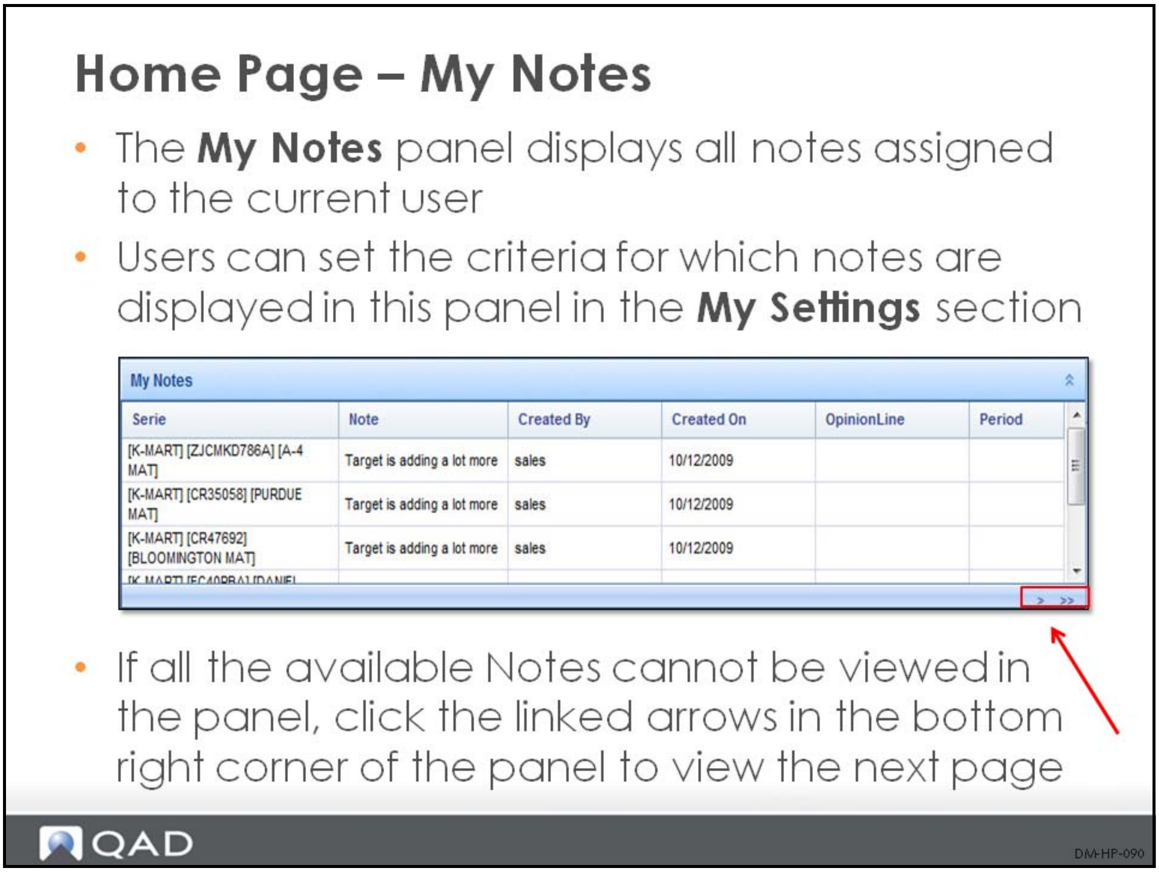
- Add any comments and click the Save icon next to the drop-down
- The status is updated and displays on the My Workflow panel

Home Page – My Reports

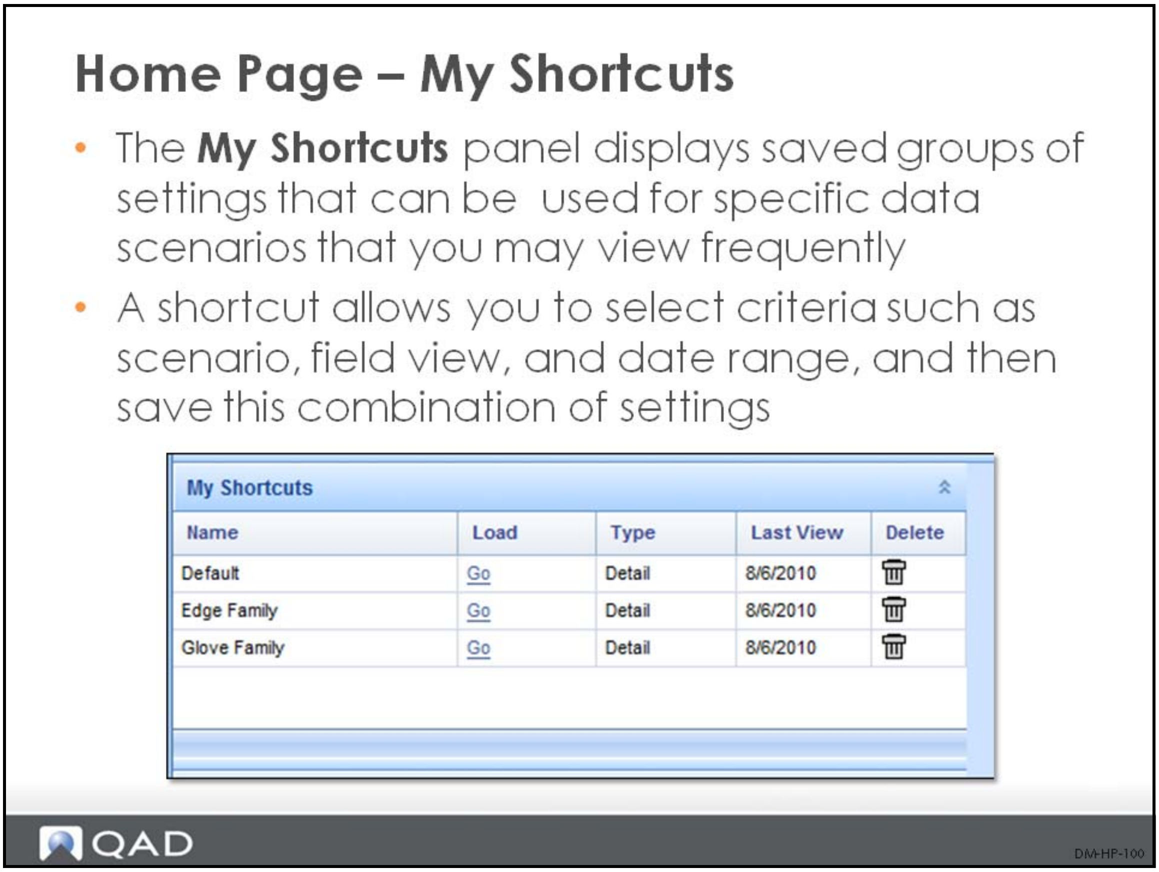


- Use the drop-downs to change the Aggregate report criteria
- Click the “Show” link in the Link Report column to generate and view the report

Home Page – My Notes

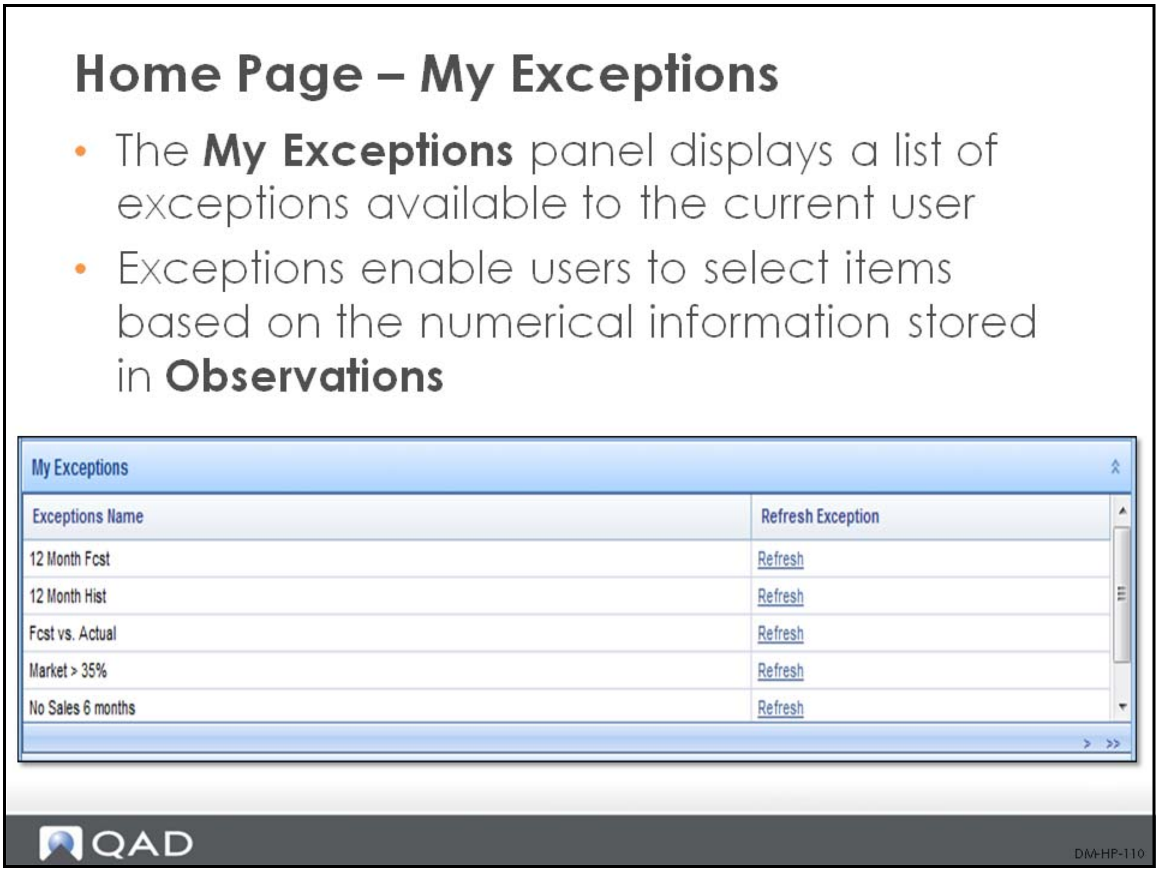


Home Page – My Shortcuts



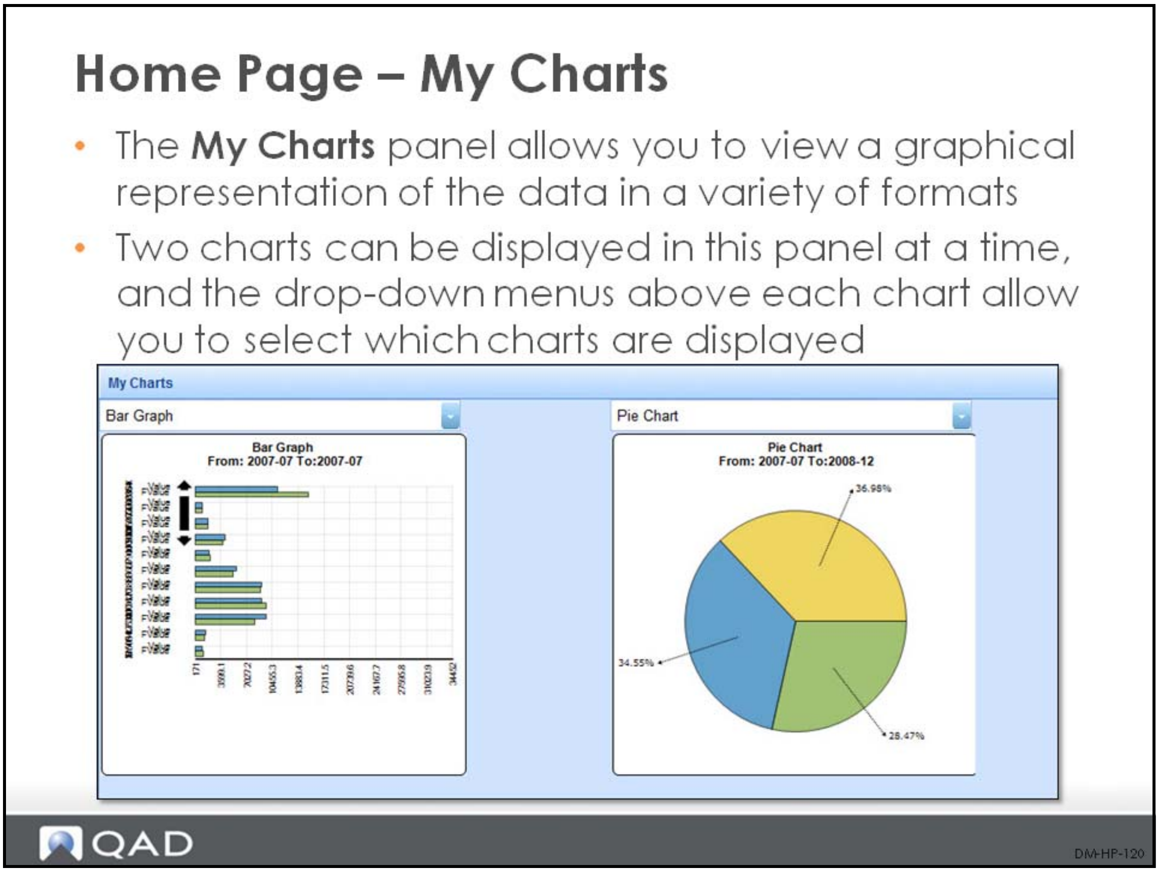
- Shortcuts are created using My Views portion of the Home Page
- Click the “Go” link in the Load column to run the shortcut and display the data in the selected view

Home Page – My Exceptions



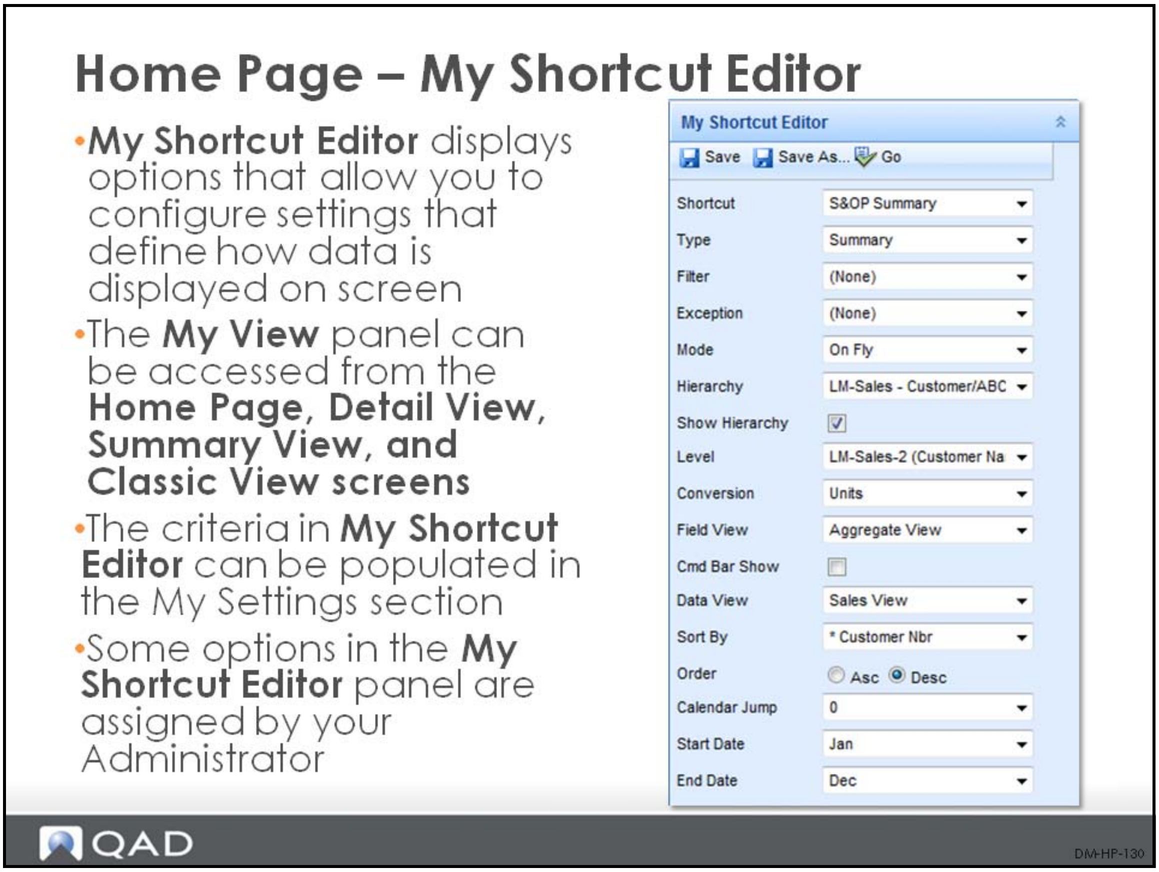
- Exceptions are created in the My Settings portion of Planning Portal
- Click the “Refresh” link in the Refresh Exception column to apply the exception in the selected view

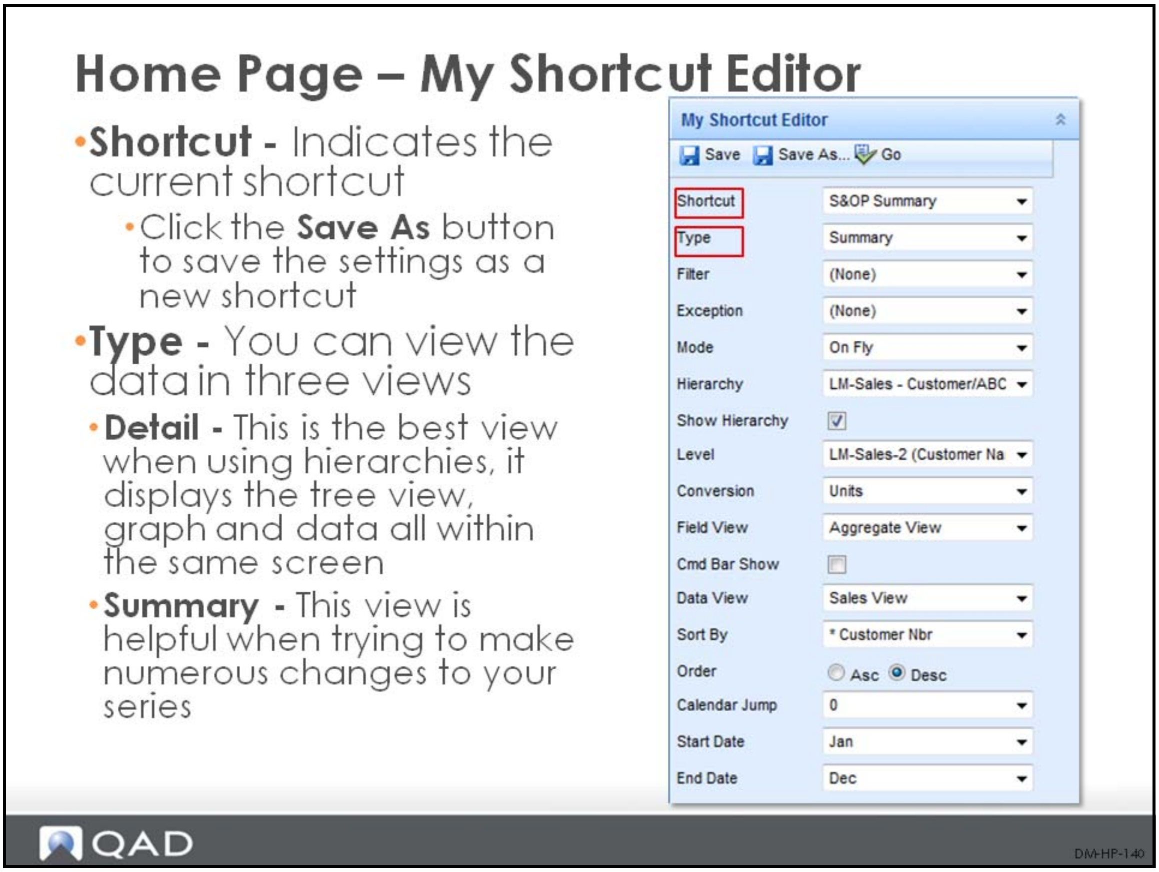
Home Page – My Charts



- If the user only has one chart created, it will display in the My Charts panel twice
- The criteria and settings for these charts can be selected in the My Settings portion of Planning Portal

Home Page – My Shortcut Editor




Home Page – My Shortcut Editor
•Shortcut - Indicates the current shortcut
•Click the Save As button to save the settings as a new shortcut
•Type - You can view the data in three views
•Detail - This is the best view when using hierarchies, it displays the tree view, graph and data all within the same screen
•Summary - This view is helpful when trying to make numerous changes to your series
My Shortcut Editor
Save
Save As...
Go
Shortcut
S&OP Summary
Type
Summary
Filter
(None)
Exception
(None)
Mode
On Fly
Hierarchy
LM-Sales - Customer/ABC
Show Hierarchy
Level
LM-Sales-2 (Customer Na
Conversion
Units
Field View
Aggregate View
Cmd Bar Show
Data View
Sales View
Sort By
* Customer Nbr
Order
Asc
Desc
Calendar Jump
0
Start Date
Jan
End Date
Dec
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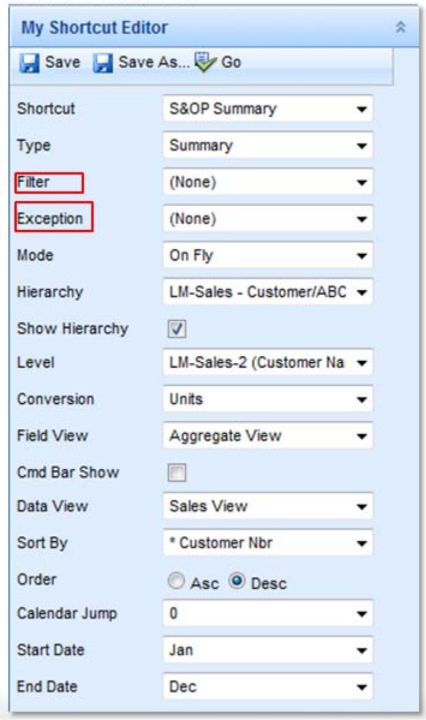
DM-HP-140

Home Page – My Shortcut Editor

- **Filter -** Select the filter (optional) to apply to this view
  - Only currently saved filters will display in the drop-down and new filters cannot be added here
- **Exception -** Select the exception (optional) to apply to this view when it is displayed
  - Only currently saved exceptions will display in the drop-down and new exceptions cannot be added here



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Home Page – My Shortcut Editor

- **Mode -** Use this field to select the type of Hierarchy to apply if any
  - **None -** Do not apply a hierarchy
  - **On Fly -** On Fly hierarchies are the preferred way of aggregating your data
    - Use this option to apply hierarchies quickly and view data at higher levels
  - **Static -** Static hierarchies are usually applied within the DME Viewer
    - If a scenario has a static hierarchy applied to it, you can use this option to view the aggregated data
- Depending on the permissions assigned to your user account, hierarchies may not be available

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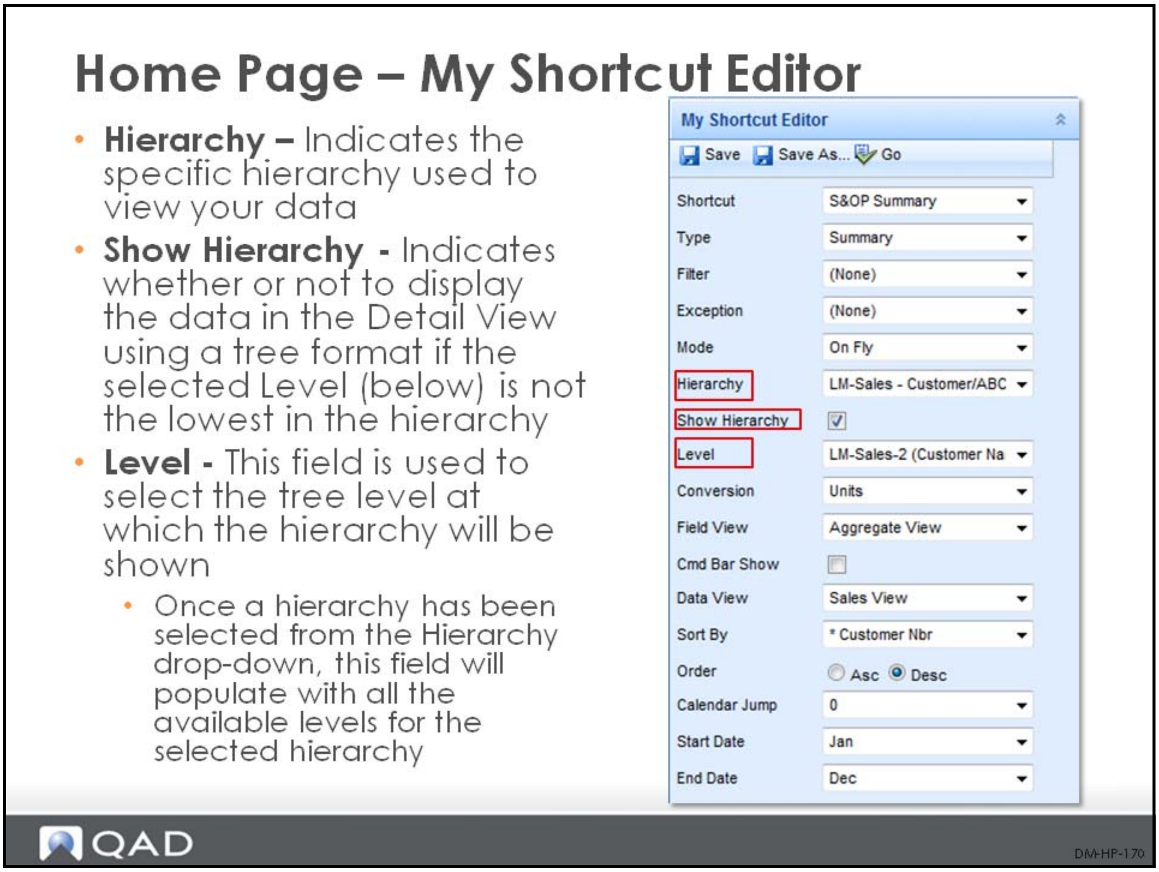
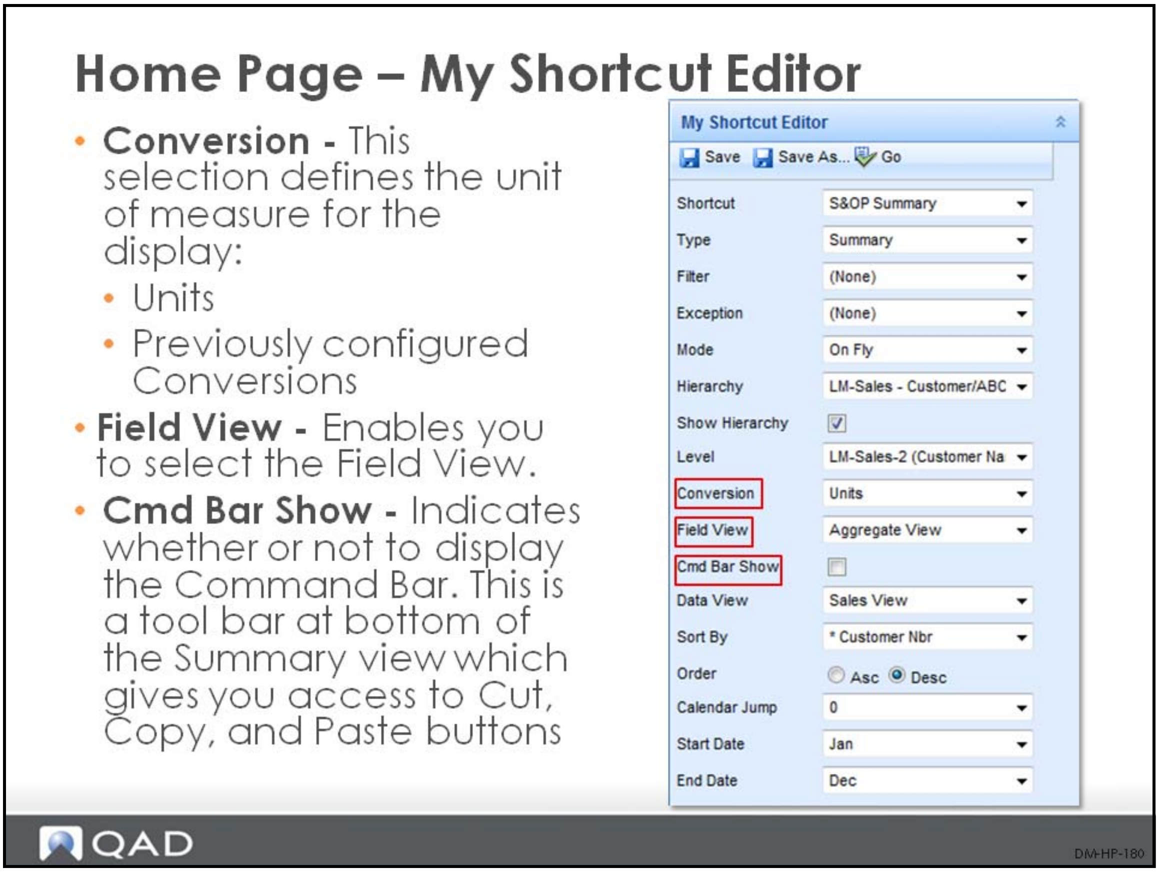
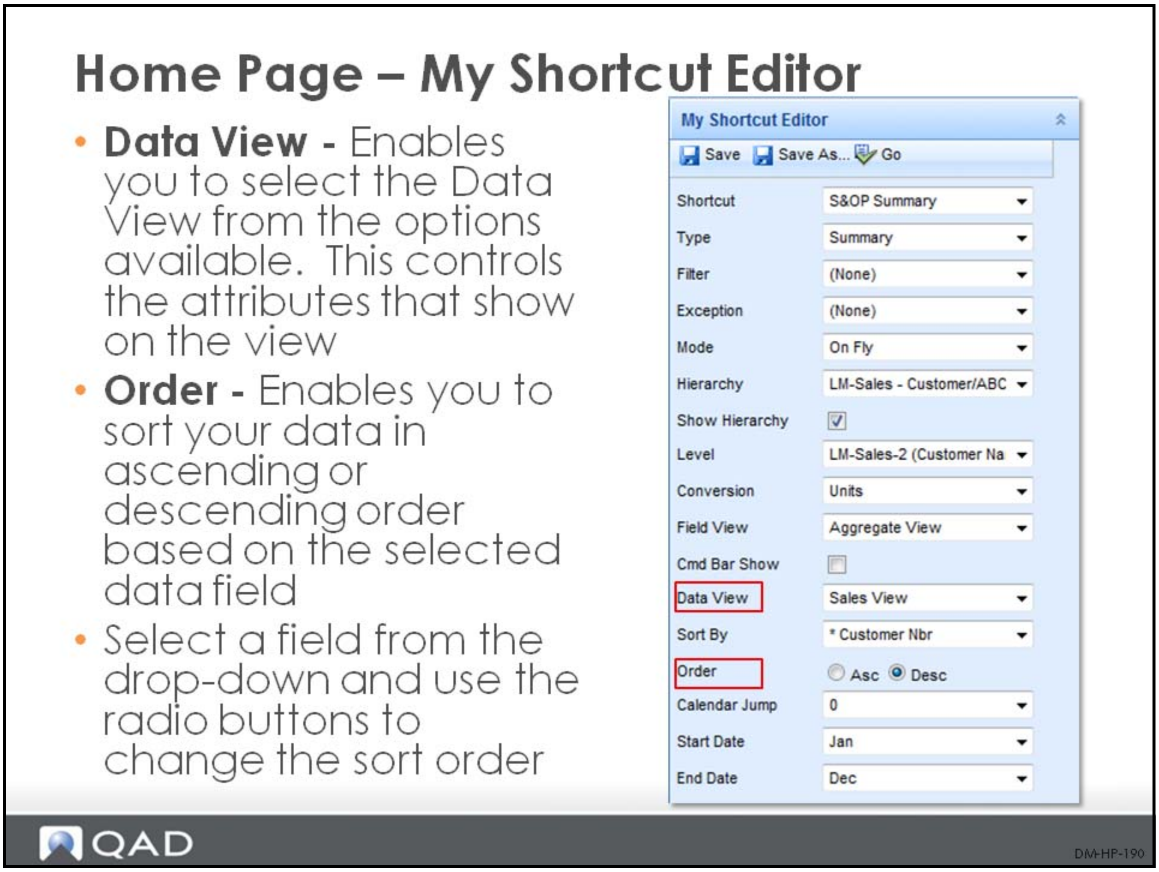
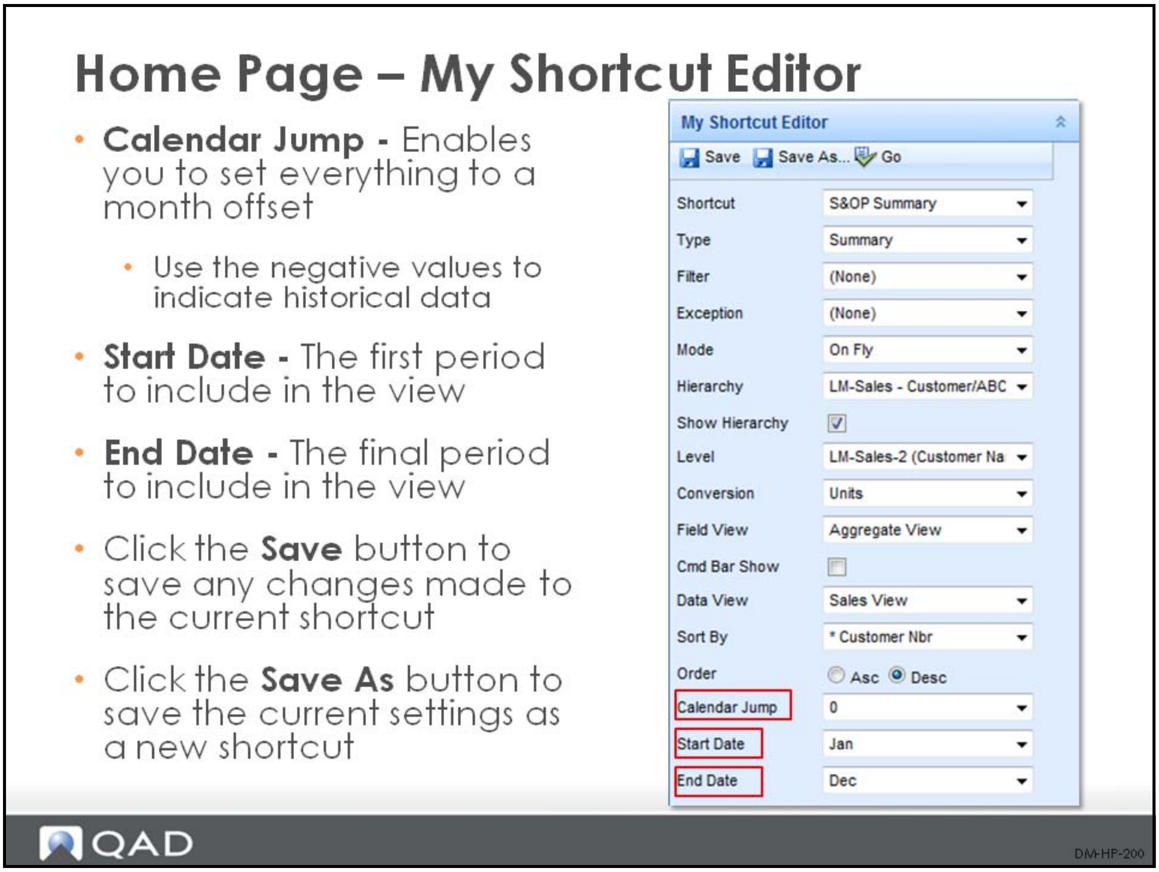

Home Page – My Shortcut Editor
• Hierarchy – Indicates the specific hierarchy used to view your data
• Show Hierarchy - Indicates whether or not to display the data in the Detail View using a tree format if the selected Level (below) is not the lowest in the hierarchy
• Level - This field is used to select the tree level at which the hierarchy will be shown
• Once a hierarchy has been selected from the Hierarchy drop-down, this field will populate with all the available levels for the selected hierarchy
My Shortcut Editor
Save
Save As...
Go
Shortcut
S&OP Summary
Type
Summary
Filter
(None)
Exception
(None)
Mode
On Fly
Hierarchy
LM-Sales - Customer/ABC
Show Hierarchy
Level
LM-Sales-2 (Customer Na
Conversion
Units
Field View
Aggregate View
Cmd Bar Show
Data View
Sales View
Sort By
* Customer Nbr
Order
Asc
Desc
Calendar Jump
0
Start Date
Jan
End Date
Dec
QAD
DM-HP-170


Home Page – My Shortcut Editor
Conversion - This selection defines the unit of measure for the display:
Units
Previously configured Conversions
Field View - Enables you to select the Field View.
Cmd Bar Show - Indicates whether or not to display the Command Bar. This is a tool bar at bottom of the Summary view which gives you access to Cut, Copy, and Paste buttons
My Shortcut Editor
Save
Save As...
Go
Shortcut
S&OP Summary
Type
Summary
Filter
(None)
Exception
(None)
Mode
On Fly
Hierarchy
LM-Sales - Customer/ABC
Show Hierarchy
Level
LM-Sales-2 (Customer Na
Conversion
Units
Field View
Aggregate View
Cmd Bar Show
Data View
Sales View
Sort By
* Customer Nbr
Order
Asc
Desc
Calendar Jump
0
Start Date
Jan
End Date
Dec
QAD
DM-HP-180

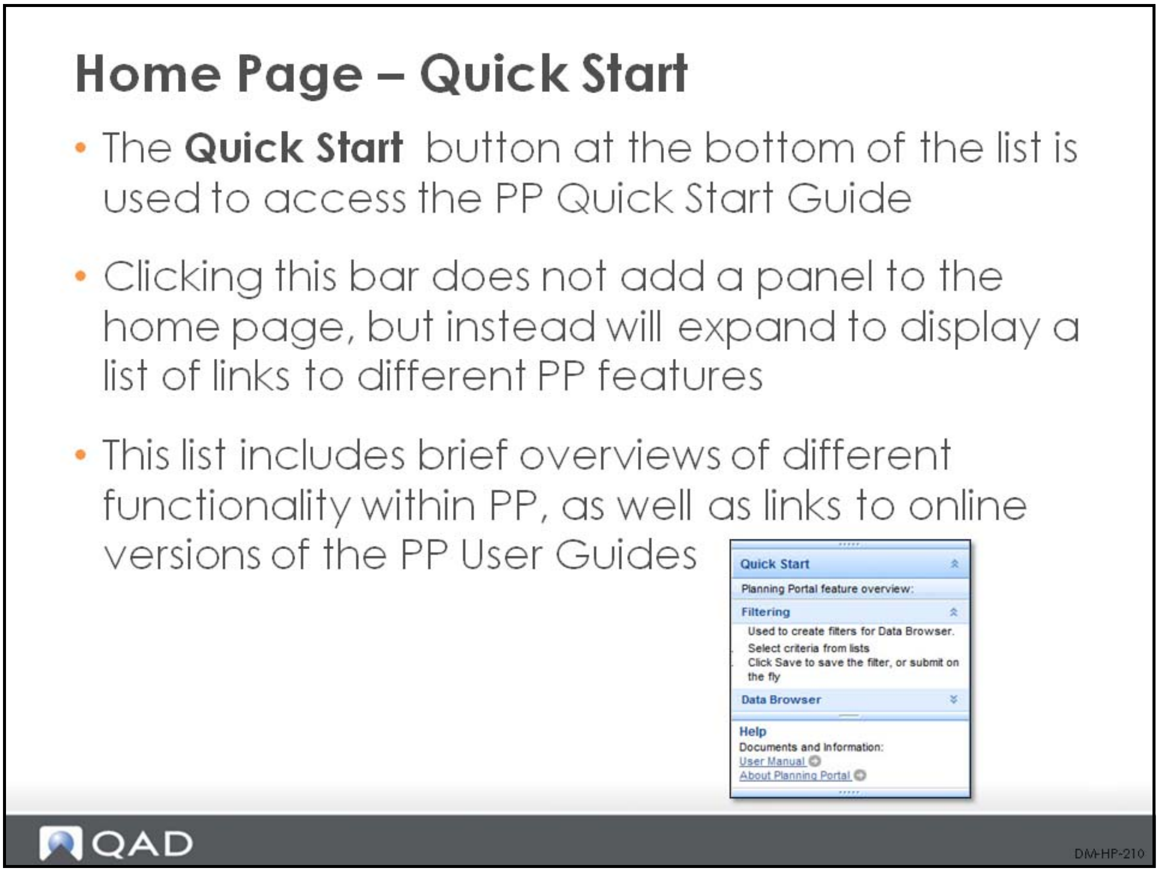


Data Views are assigned by your administrator and can be created on the My Settings page.

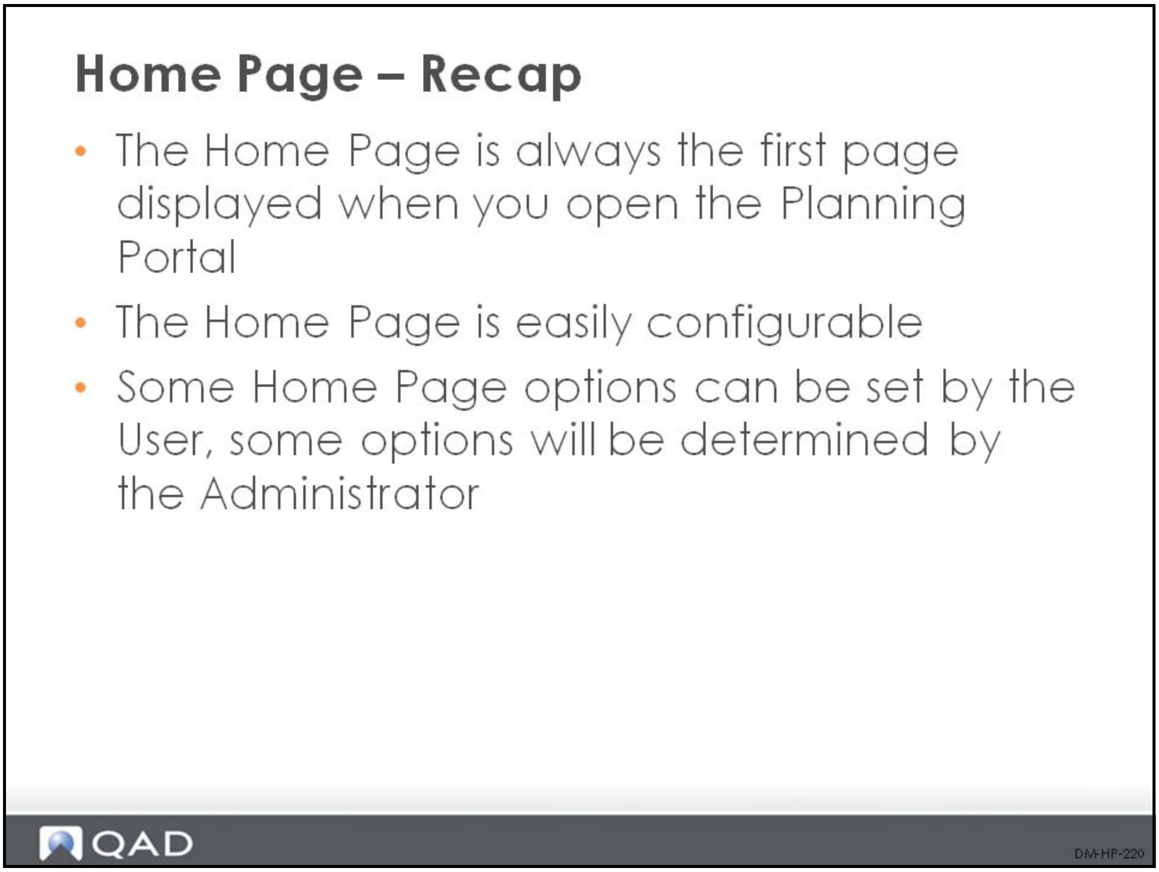


Data Views are assigned by your administrator and can be created on the My Settings page.

Home Page – Quick Start



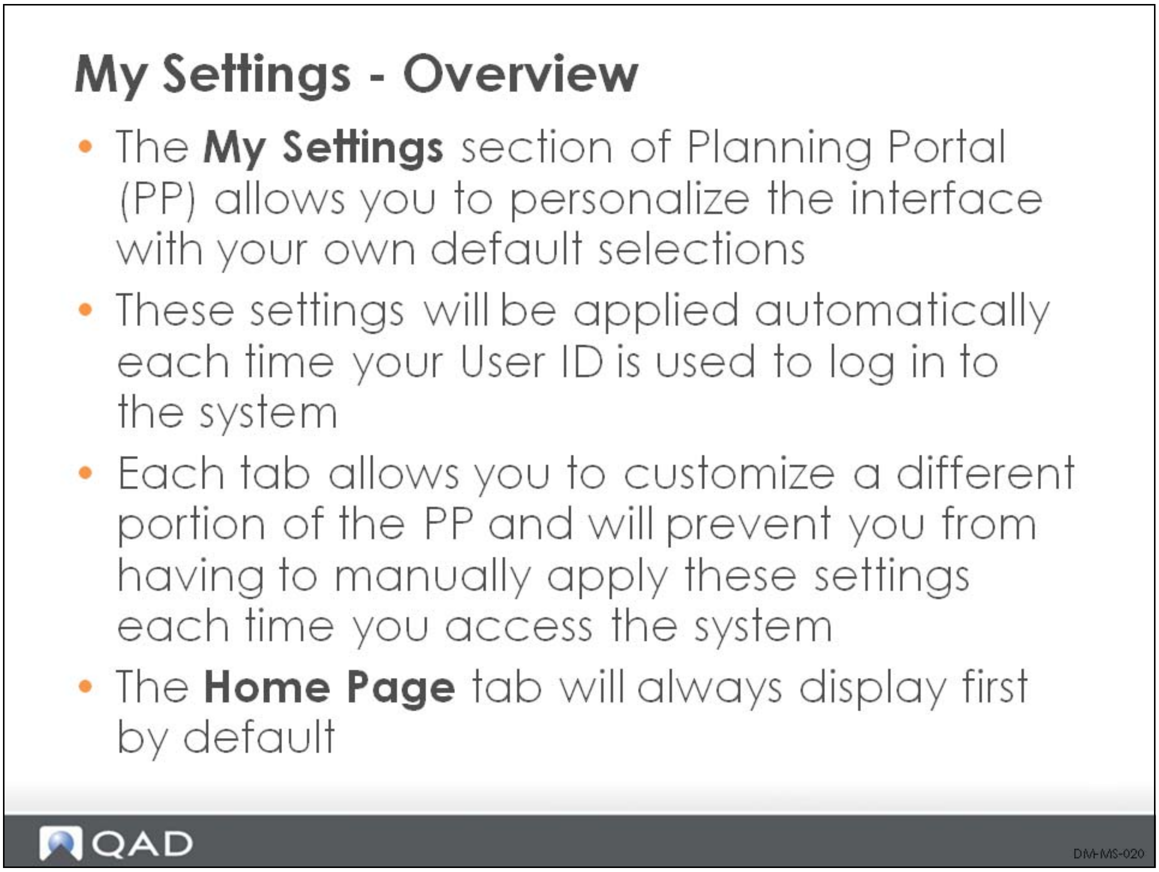
Home Page – Recap



Chapter 3

My Settings

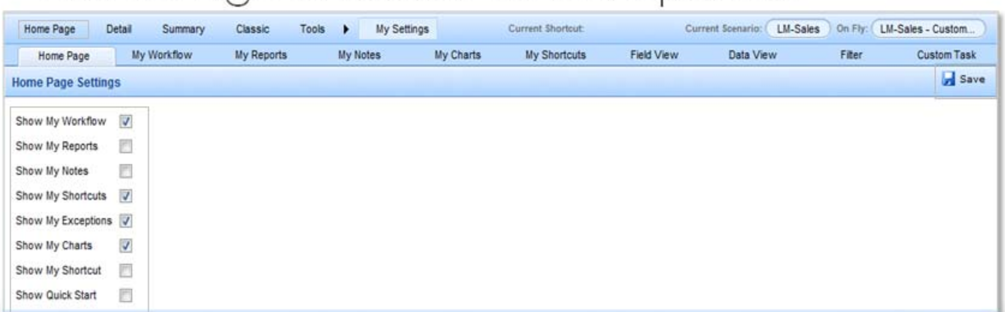
My Settings - Overview



Home Page Tab

Home Page Tab

- The **Home Page** tab allows you select which panels are displayed by default when logging into PP
- Use the check boxes to select which panels to display and click **Save**
- You will still be able to click the bars on the Home Page to add or remove panels



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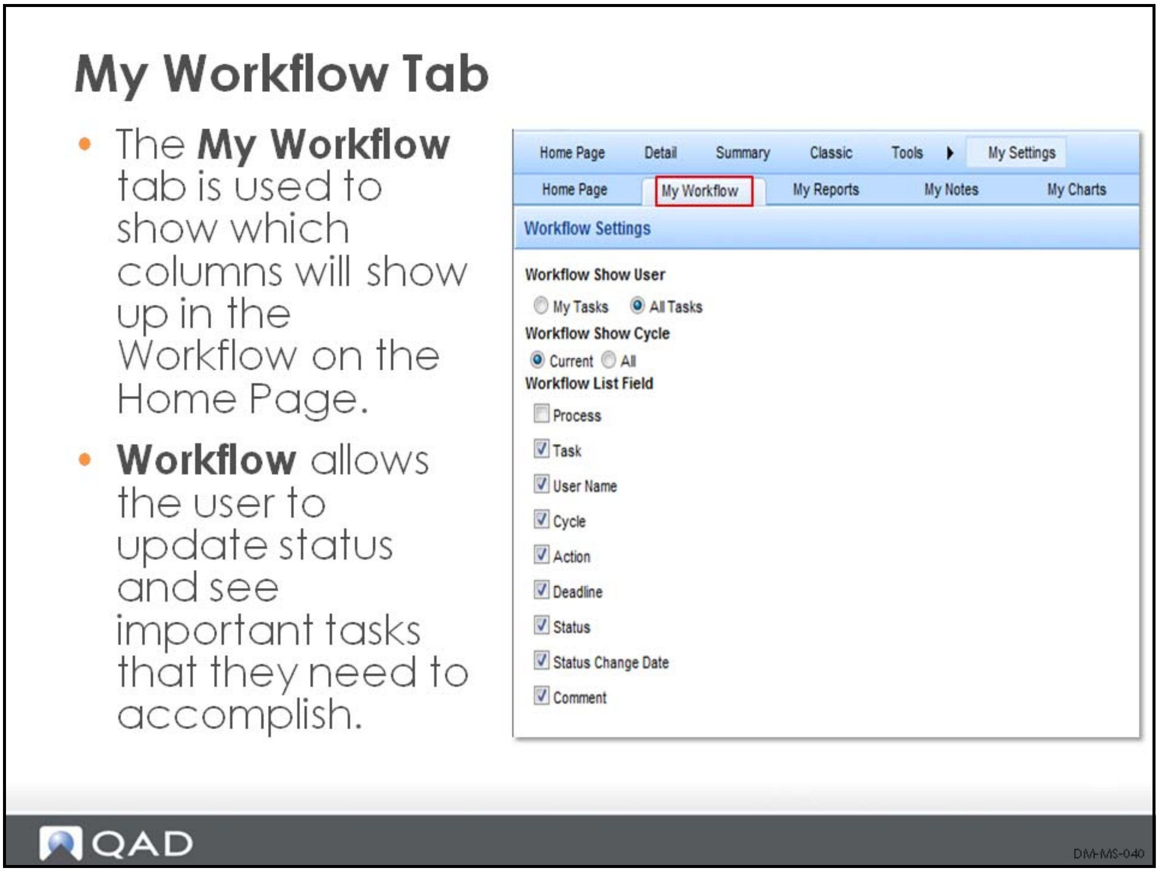
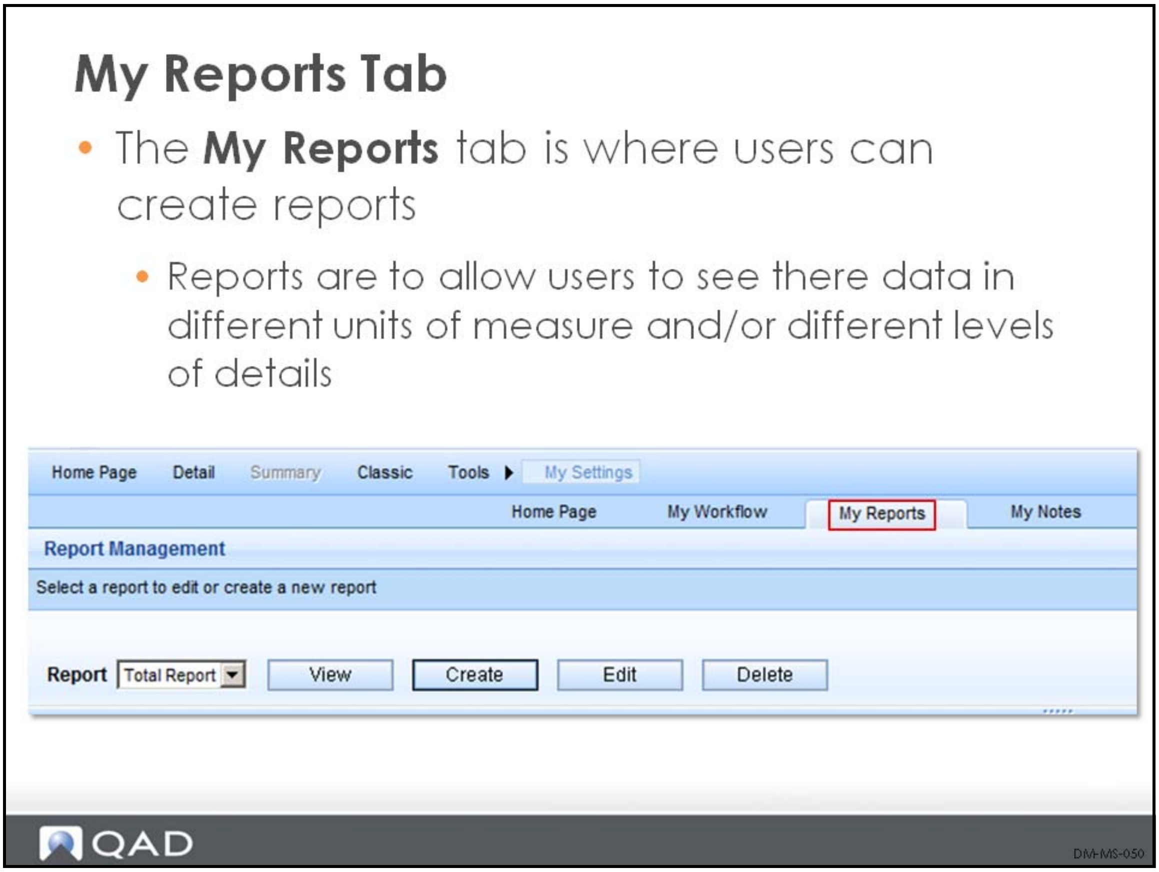
My Workflow Tab



My Tasks vs. All – use this to display all tasks or only your tasks.

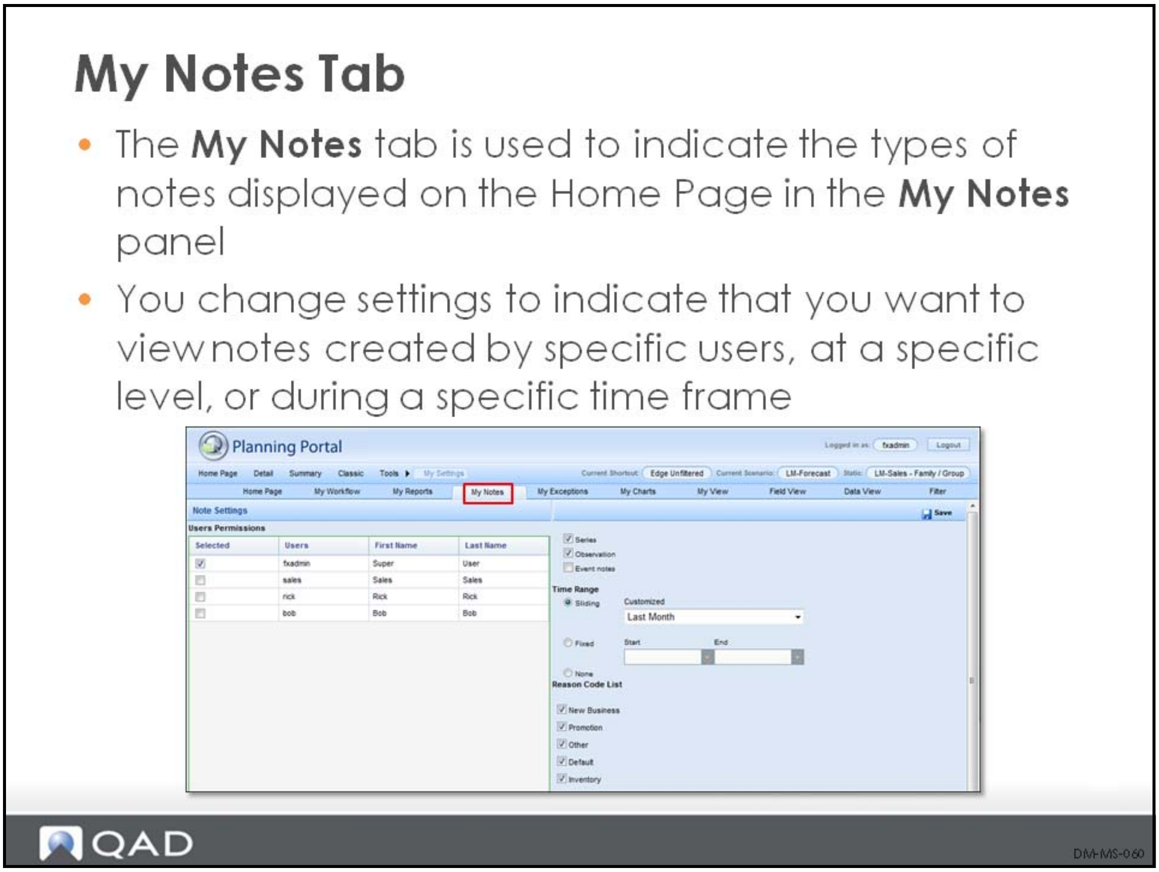
- Current vs All
  - Current will show tasks and process that are due for this cycle
  - All will show all tasks and processes that a user can see regardless of cycle
- Workflow List Field
  - Process is the group of one or more tasks
  - Task is the task description for the user
  - User Name is the user the task is assigned to
  - Cycle is the period the task is due
  - Action – Actions the user needs to take
    - Options are: Reports, Shortcuts, Exceptions, None
  - Deadline – specific date when the task is due
  - Status – The user will assign the status of the task from the Home Page
  - Select – Use this check box to select the rows for “Change Status”

My Reports Tab



- View – Run the report and view the results
- Create – Define a new report
- Edit – Edit an existing report
- Delete – Delete a report

My Notes Tab


My Notes Tab
The **My Notes** tab is used to indicate the types of notes displayed on the Home Page in the **My Notes** panel
You change settings to indicate that you want to view notes created by specific users, at a specific level, or during a specific time frame
Planning Portal
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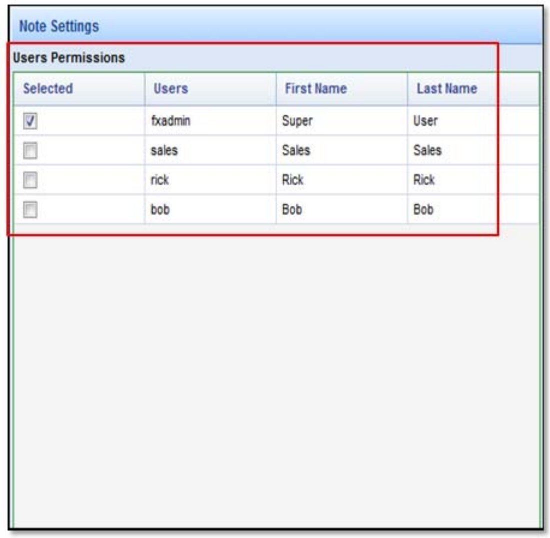
DM-MS-060

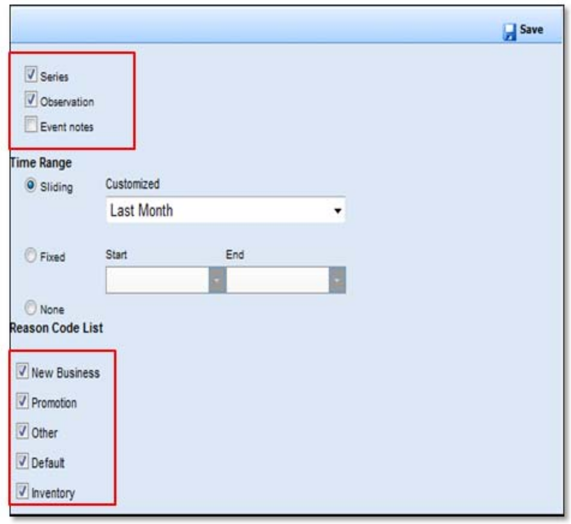
My Notes Tab

- The left-hand panel displays the **User Permissions** section where you can select which users' notes you want to see
- Use the check boxes in the **Selected** column to indicate the individual users who created the notes that will be displayed on your Home Page



My Notes Tab

- Use the criteria in the right-hand panel to indicate the specific types of notes you want to display
- The check boxes at the top of the section indicate if you want to **view notes** entered at the **Series or Observation** level, and if **Event Notes** should be shown
- **Multiple check boxes can be selected** simultaneously



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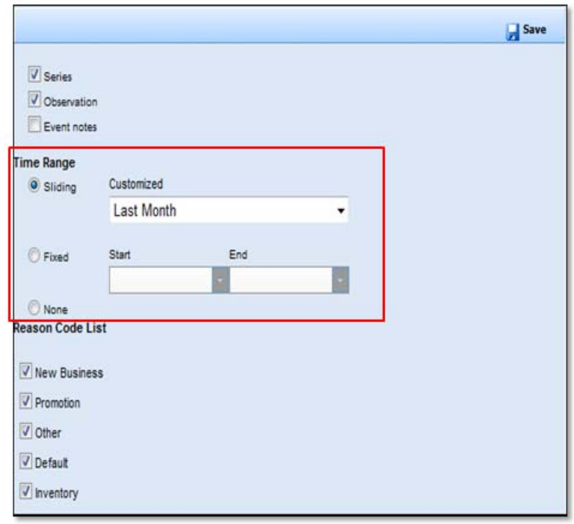
DM-MS-080

My Notes Tab

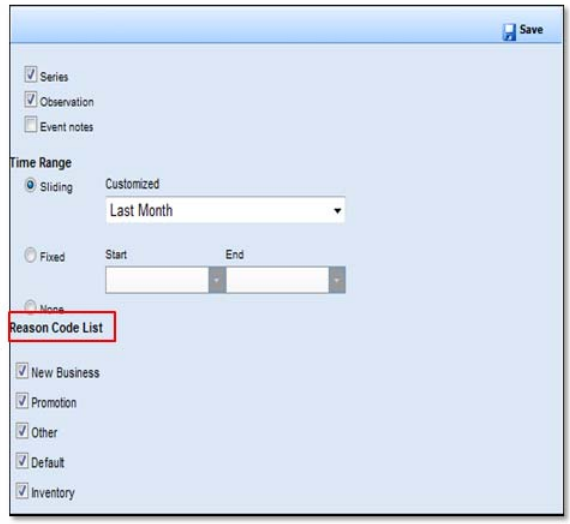
- In the Time Range section, select a date range and only notes entered during the specified time frame will display:
  - **Sliding:** A set time frame such as Today, Yesterday, Last Week, or Last Month
    - The dates covered by these time frames will always be re-calculated for the current date
  - **Fixed:** Indicate the start and end dates for the range in MM/DD/YYYY format
  - **None:** Include all notes regardless of when they were created



DMI-MS-090

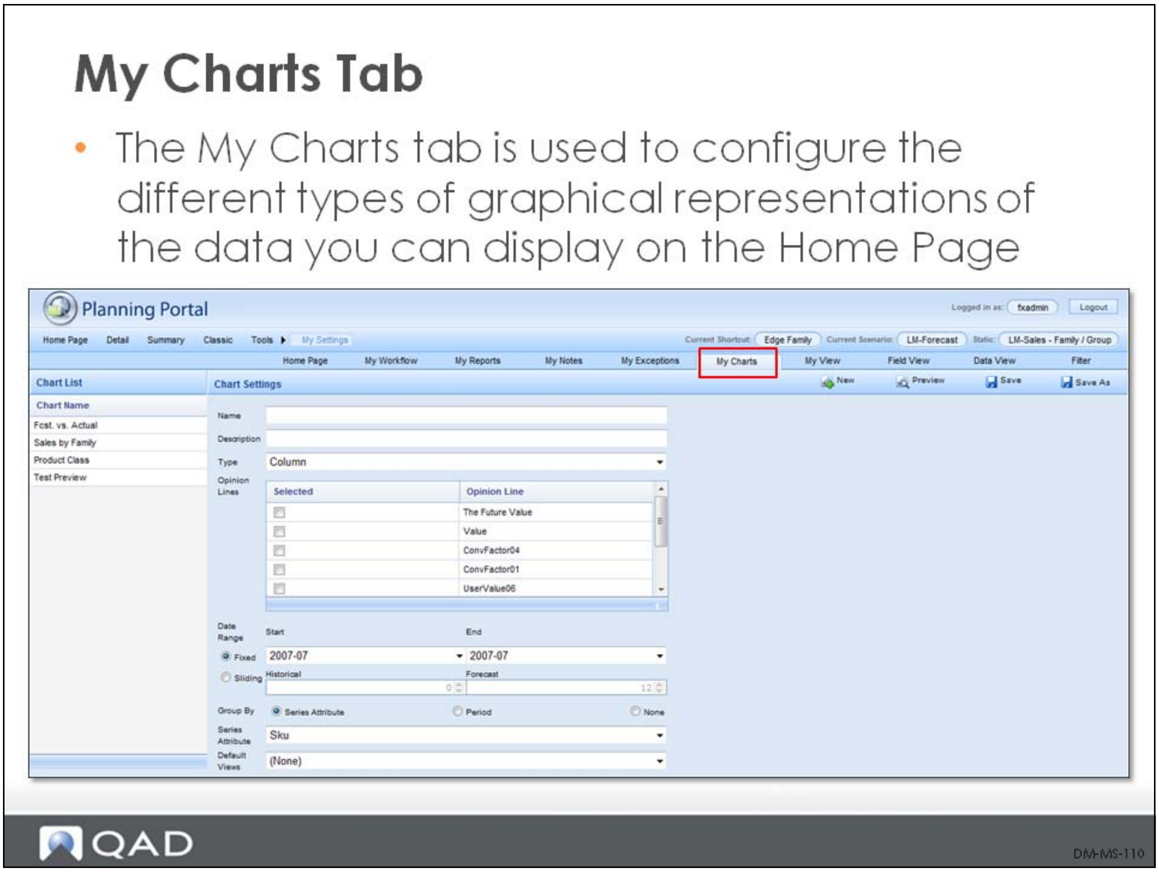
My Notes Tab

- The **Reason Code List** allows you to view notes that were entered for a specific reason.
- Possible options are New Business, Promotion, Other, Default, and Inventory
- Only notes assigned the selected Reason Codes will display in the My Notes section of the Home Page
- The Reason Codes are configured in PP Admin and is selected from the drop-down list on the Editor Tab when the note is being created



DM-MS-100

My Charts Tab

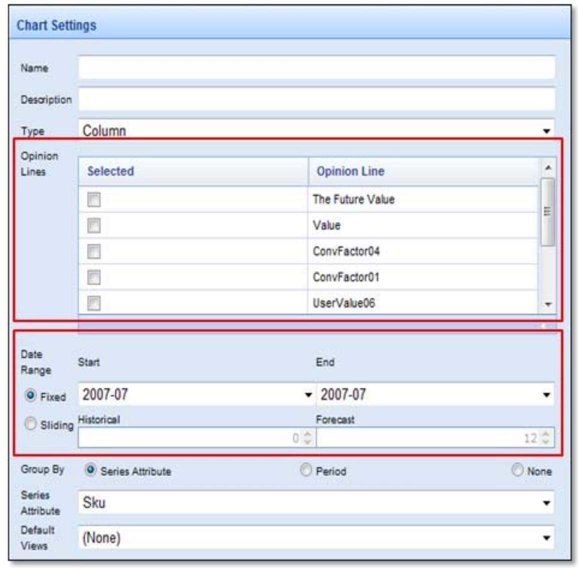


There are eight different types of charts and graphs that you can display on the My Charts panel:

- Column
- Stacked Column
- Bar
- Stacked Bar
- Line
- Pie
- Doughnut
- Concentric Doughnut

My Charts Tab

- In the **Opinion Lines** section, use the check boxes to select the lines you want to use to generate the charts
- In the **Date Range** field, set the time frame for the data used to generate the chart
  - Choose either a **Fixed** range (specific start and end dates) or a **Sliding** range (for example, a six month range that varies based on the current date)



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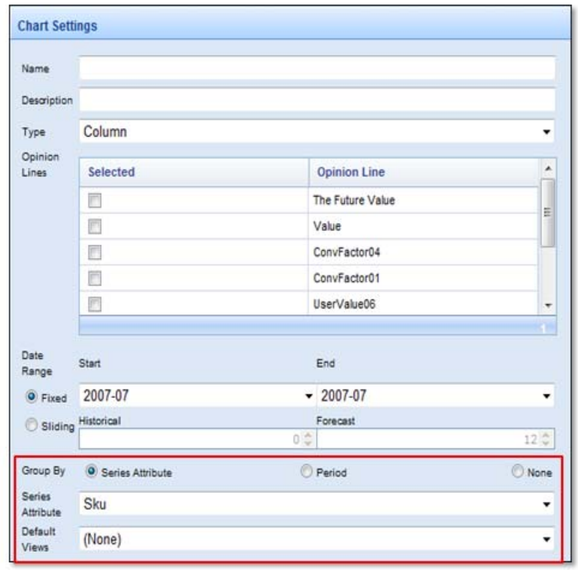
DM-MS-120

My Charts Tab

- Use the **Group By** radio buttons to indicate whether the data is sorted based on either the Series Attribute or the time Period
- The **Series Attribute** drop-down allows you to choose a specific attribute to group by
  - This field is only active if the Series Attribute option is selected in the Group By field
- The **Default View** drop-down is used to apply a custom view to the data when creating the chart



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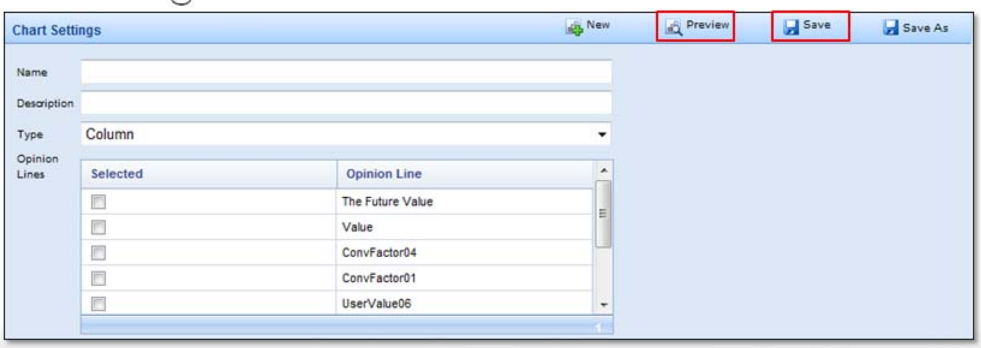
DM-MS-130

My Charts Tab

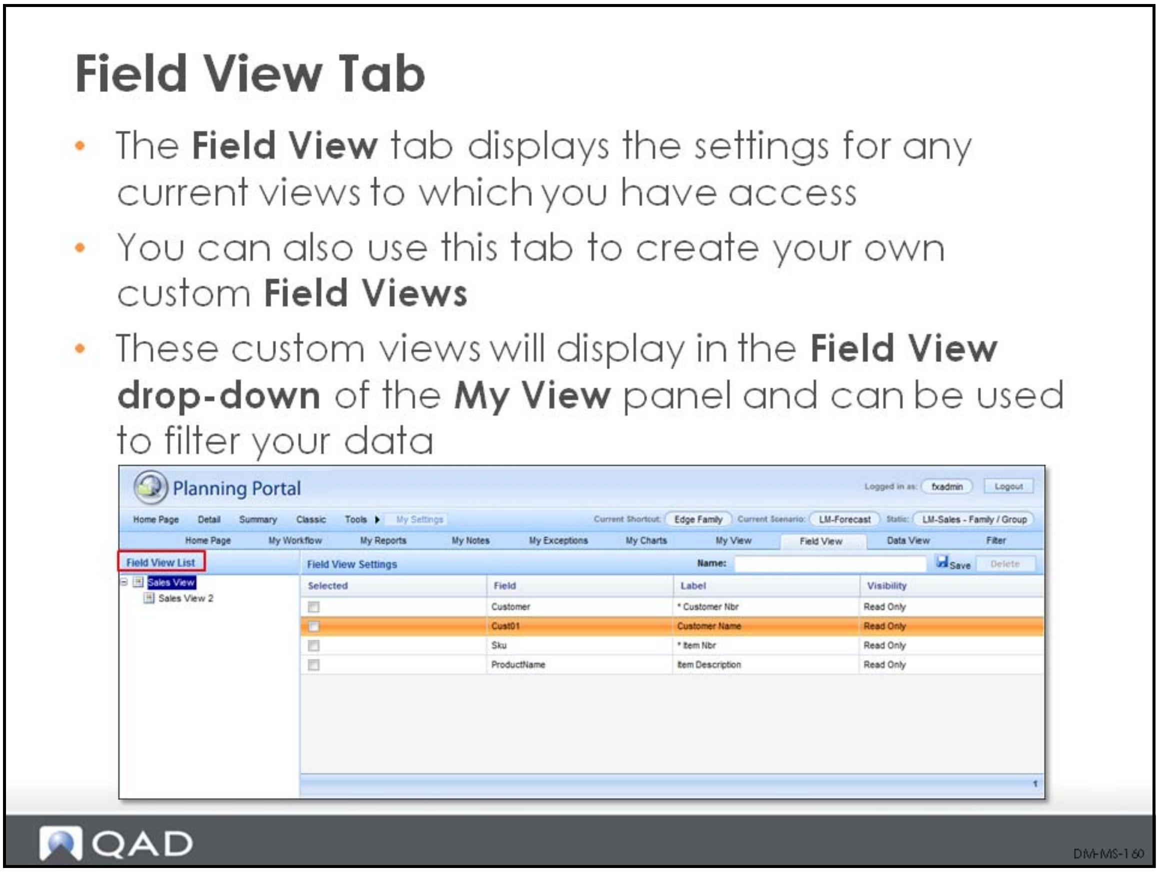
- Click the **Save** button to save the chart and add it to the Chart List at the left
- Click the **Preview** button in the Chart Settings section to preview the chart in a separate browser window
- Once a chart has been saved, it can be selected from the drop-down list in the My Charts panel of the Home Page



DM-MS-140

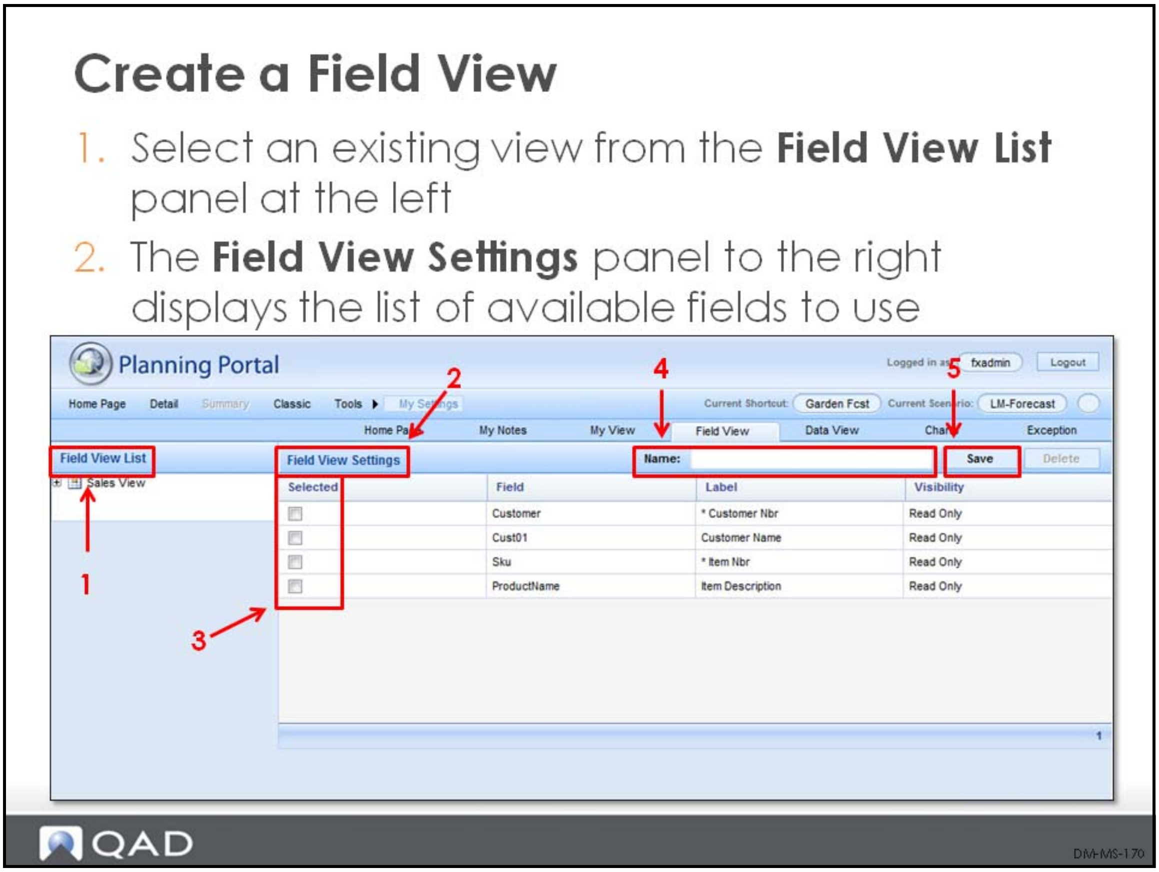
My Shortcuts Tab

Field View Tab



- System administrators can grant permission to use other Field Views and give you access to series attributes
- Field Views are extensive and show a lot of data that may need to be filtered further
- Creating a Field View allows you to define the exact data lines and attributes you want to focus on
- Use the check boxes in the Selected column to choose the fields to include in the view

Create a Field View



1 The new view is saved and added to the tree in the Field View List.

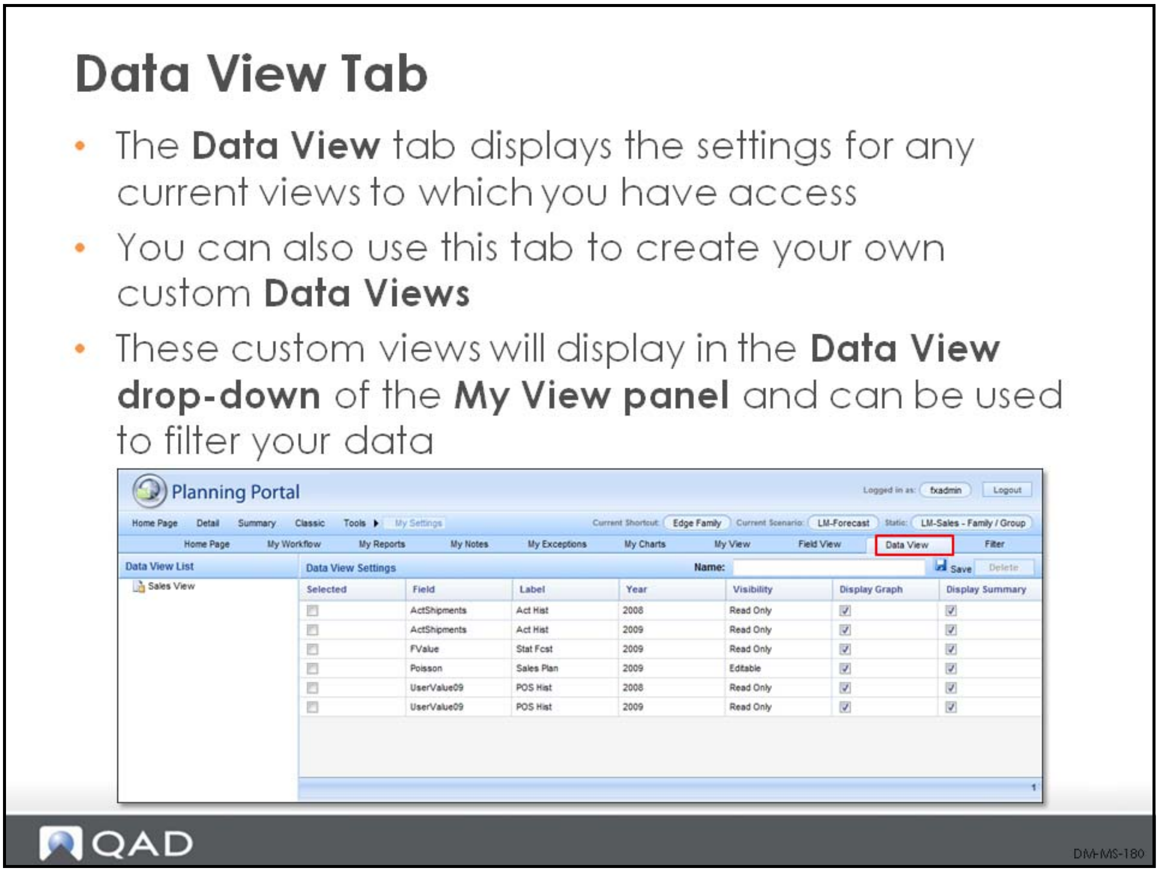
2 The new view can now be selected from the Field View drop-down on the My View panel and applied to your data.

3 Use the check boxes in the Selected column to choose the fields to include in the view.

4 Enter a descriptive title for this new view in the Name field above the Field View Settings.

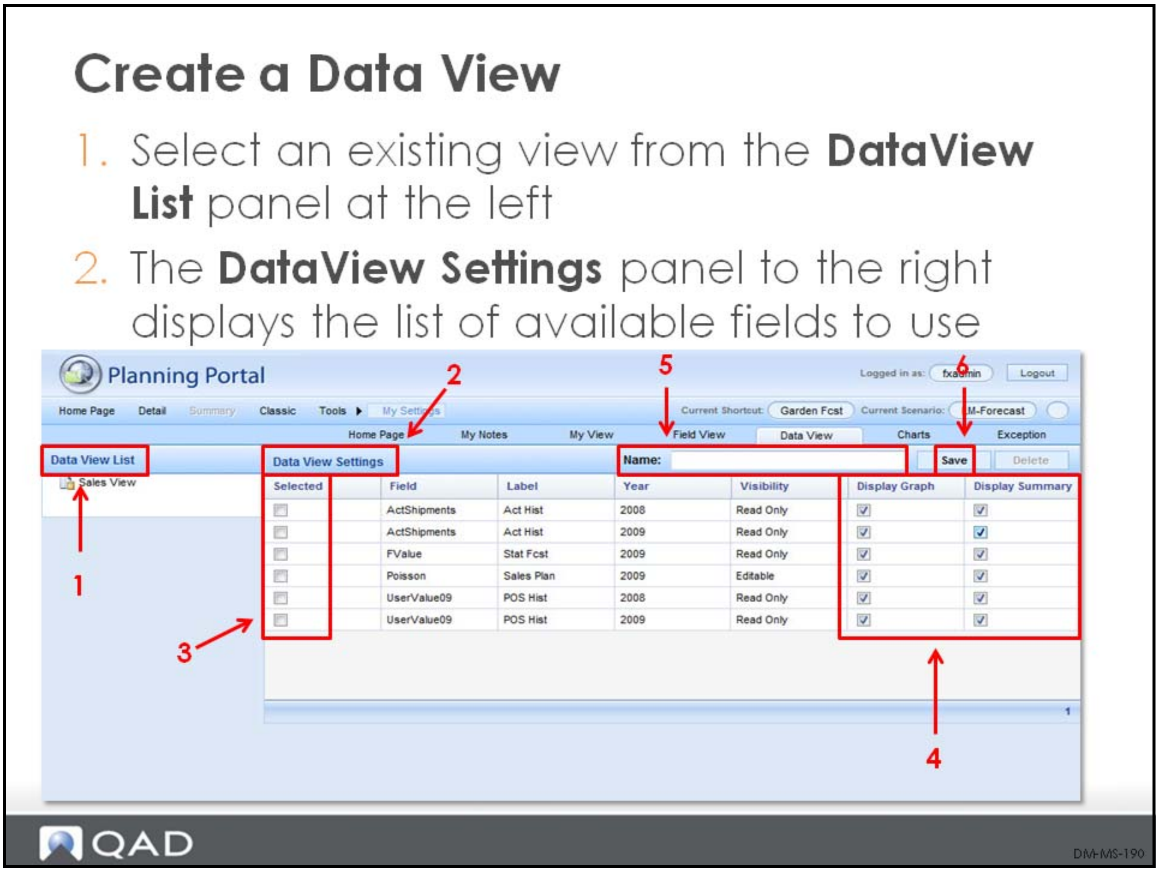
5 Click the Save button.

Data View Tab



- System administrators can grant permission to use other Data Views and give you access to series attributes.
- Data Views are extensive and show a lot of data that may need to be filtered even further.
- Creating a Data View allows you to define the exact data lines and attributes you want to focus on.
- Use the check boxes in the Selected column to choose the fields to include in the view.

Create a Data View



1 The new view is saved and added to the tree in the Data View List.

2 The new view can now be selected from the Data View drop-down on the My View panel and applied to your data.

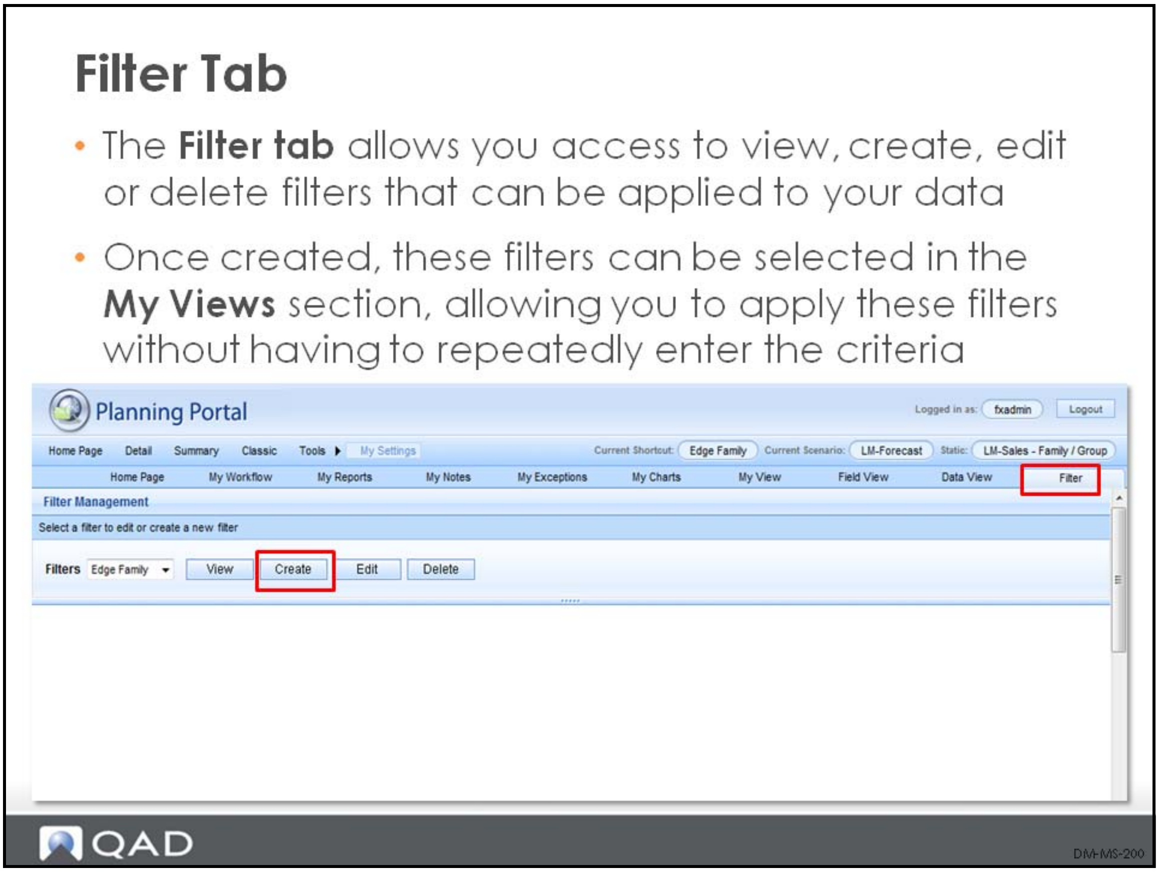
3 Use the check boxes in the Selected column to choose the fields to include in the view.

4 Use the check boxes in the Display Graph and Display Summery columns to indicate if the selected data lines will be available in the Graph and Summary sections.

5 Enter a descriptive title for this new view in the Name field above the Data View Settings.

6 Click the Save button.

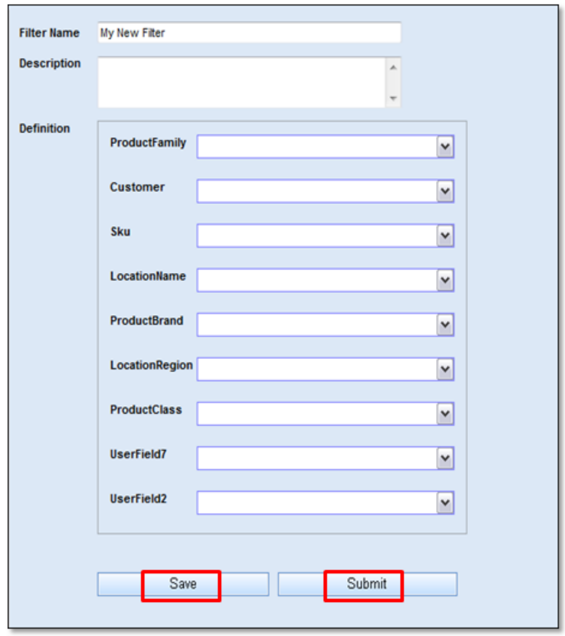
Filter Tab



Click the Create button to display the filter criteria fields below the drop-down and buttons.

Filter Tab

- Click the **Create** button to display the filter criteria fields below the drop-down and buttons
- Use the fields in the **Definition** section to select the criteria for this filter
- The available options in these fields are configured by the System Administrator
- Click **Save** to save the filter or click **Submit** to execute without saving



DM-MS-210

My Settings – Review

My Settings – Review

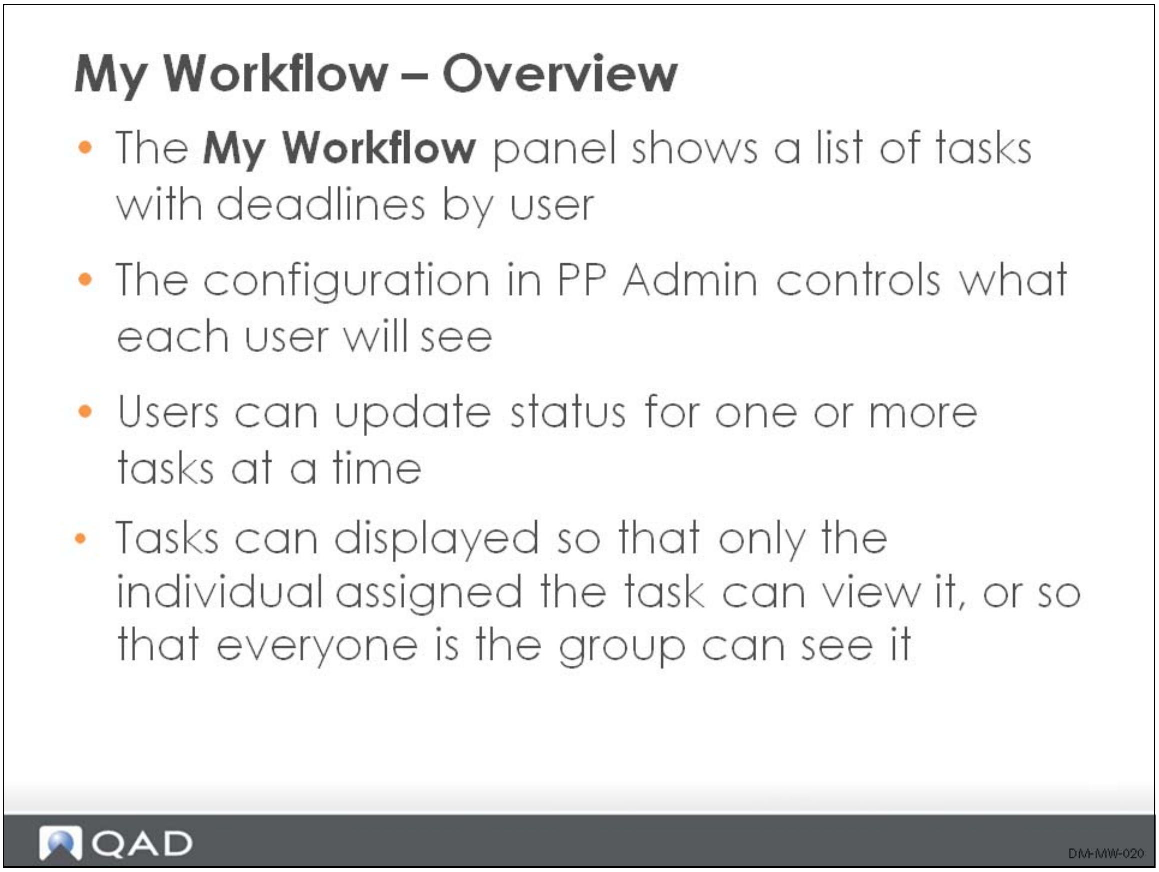
- The **My Settings** section of Planning Portal (PP) allows you to personalize the interface with your own default selections
- These settings will be applied automatically each time your User ID is used to log in to the system
- Each tab allows you to customize a different portion of the PP and will prevent you from having to manually apply these settings each time you access the system
- The **Home Page** tab will always display first by default

QAD DM-MS-220

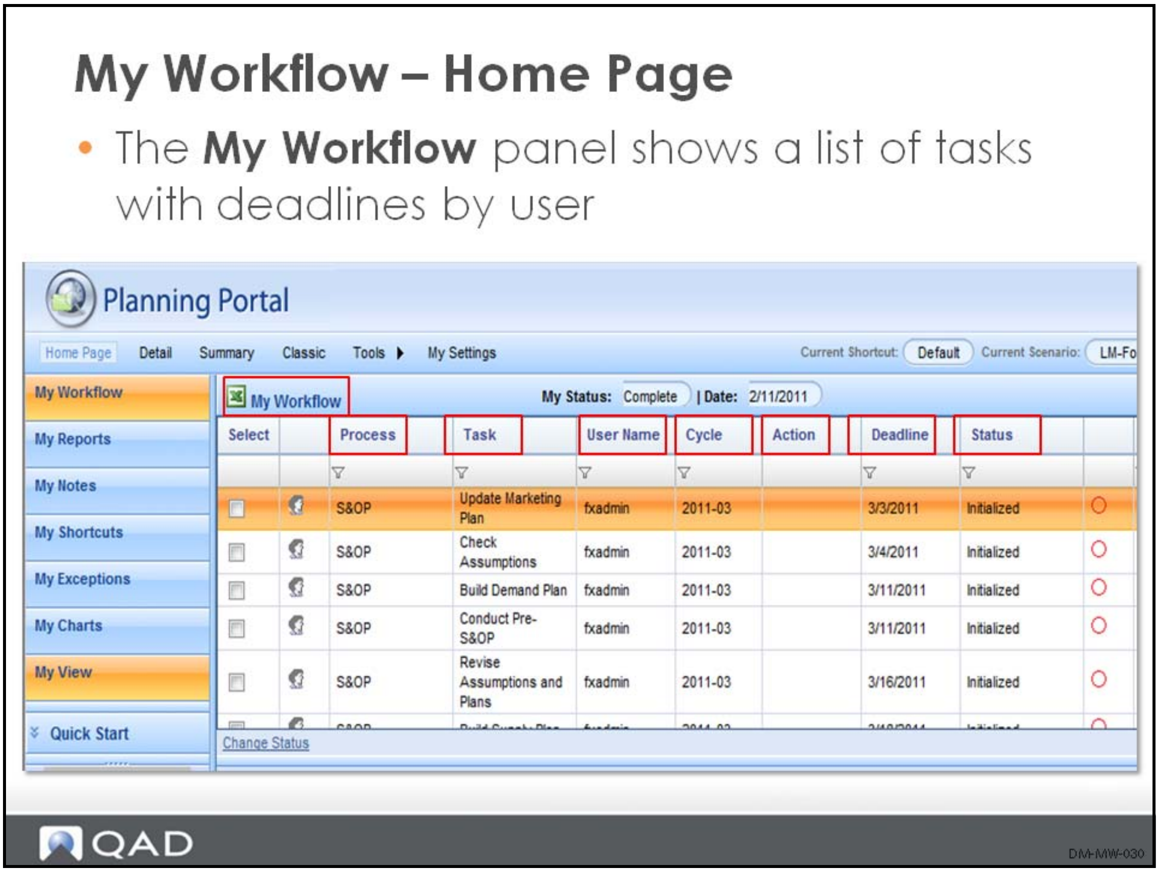
Chapter 4

My Workflow

My Workflow – Overview



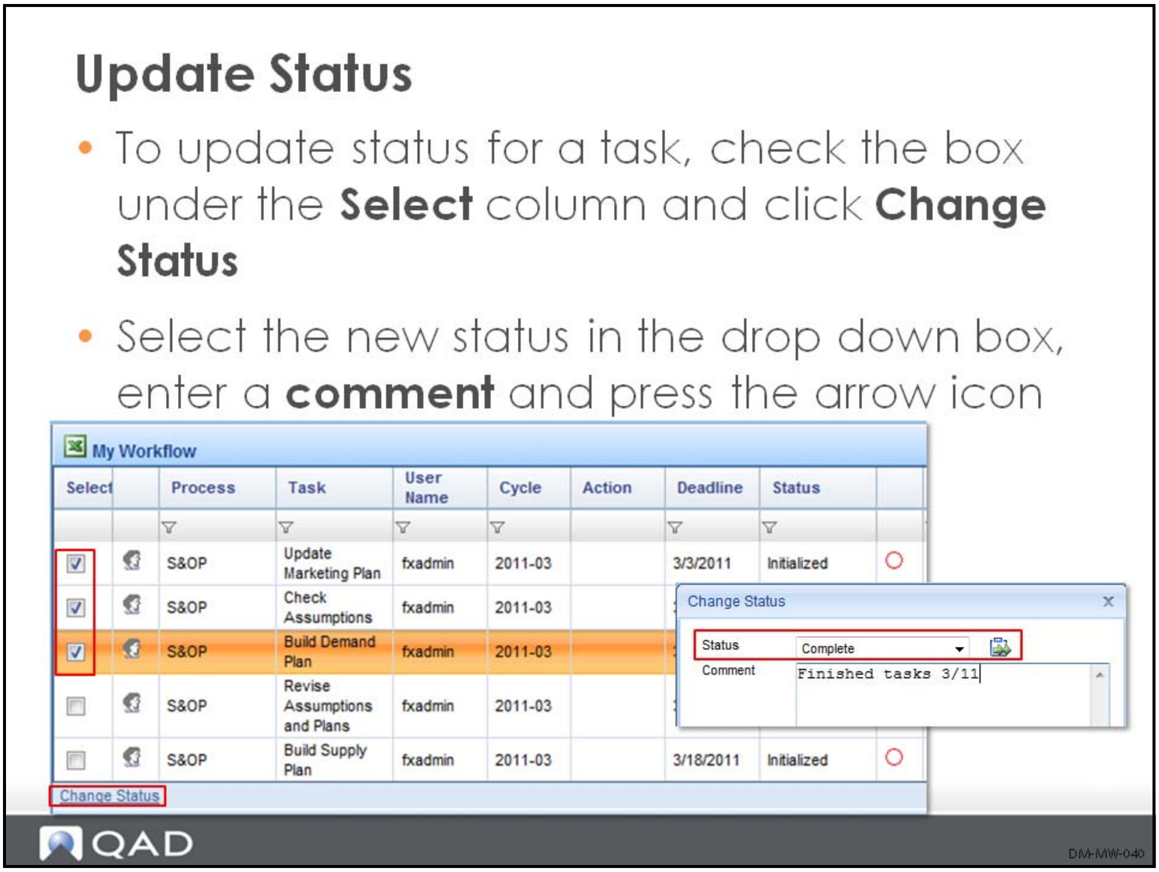
My Workflow – Home Page



The configuration in PP Admin controls what each user will see:

- Users can update status for one or more tasks at a time
- Users can add or remove fields under My Settings
- Workflow reports can be accessed from PP or DME
- The Administrator will configure PP Admin with the Processes and Tasks that will be assigned to each user
    - In this example there are six tasks under the S&OP process
- Some users may have access to see only their User Name and others could have access to a group of people and their tasks
- The Cycle refers to the monthly or weekly period for the process
- The Action column can be configured with links to Reports, Views, or Exceptions
- The Deadline is set by Task and Cycle by the Super User
- The default Status options are Initialized, In Progress, and Complete
    - These options can be modified in PP Admin.
- The graphic field next to Status will change based on the combination of Deadline and Status
- When you change the status the Date/Time will be updated and there is an option to save a Comment as well

Update Status



Update Status

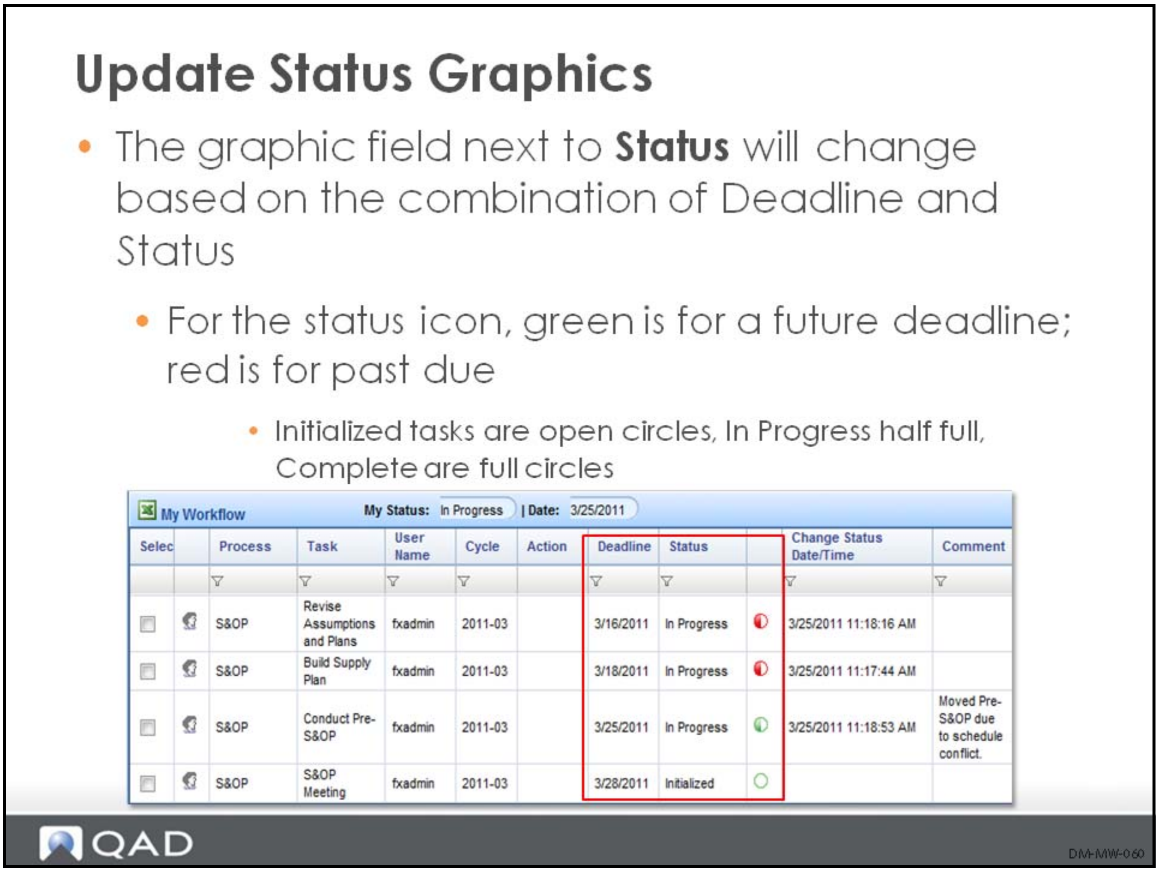
- The Status field is updated as well as the Date/Time and Comment for the three tasks selected

My Workflow My Status: Complete | Date: 3/25/2011

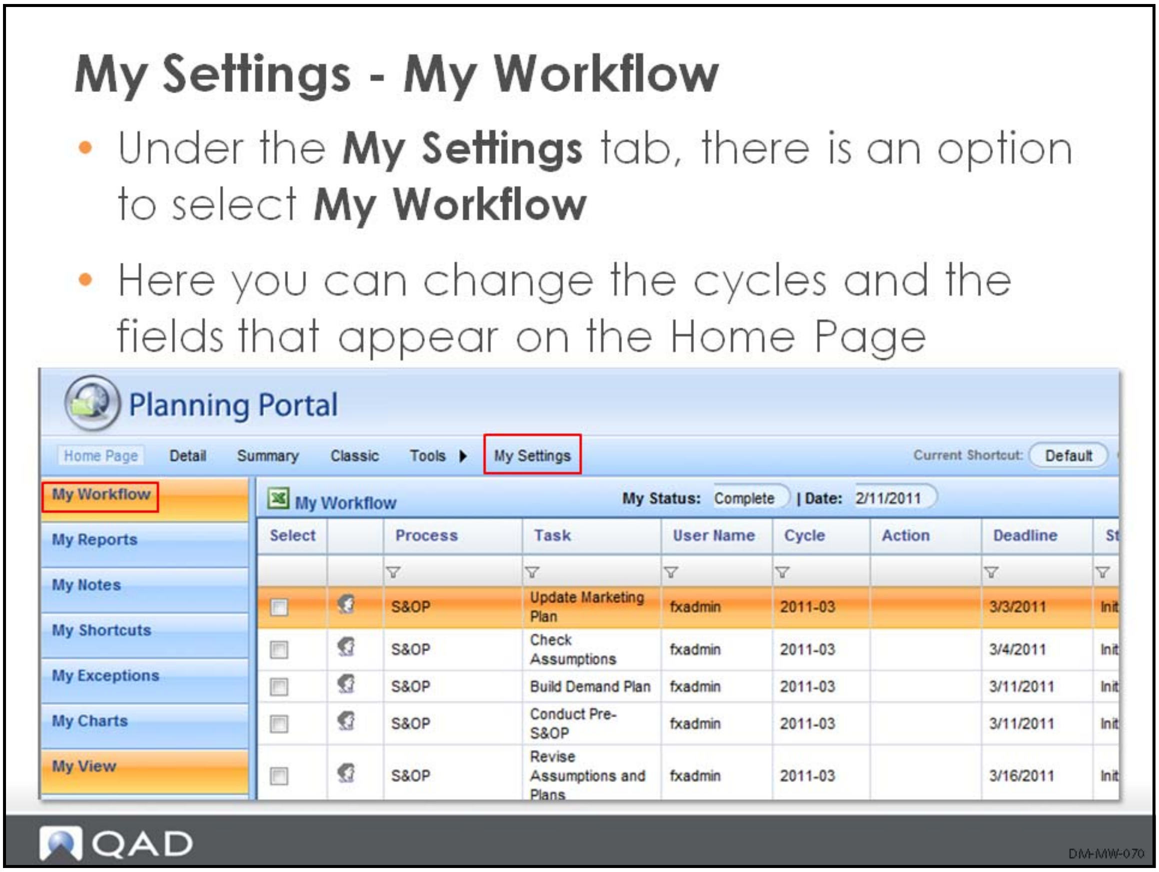
Select		Process	Task	User Name	Cycle	Action	Deadline	Status		Change Status Date/Time	Comment
		S&OP	Update Marketing Plan	fxadmin	2011-03		3/3/2011	Complete		3/25/2011 11:14:33 AM	Finished tasks 3/11
		S&OP	Check Assumptions	fxadmin	2011-03		3/4/2011	Complete		3/25/2011 11:14:33 AM	Finished tasks 3/11
		S&OP	Build Demand Plan	fxadmin	2011-03		3/11/2011	Complete		3/25/2011 11:14:33 AM	Finished tasks 3/11
		S&OP	Revise Assumptions and Plans	fxadmin	2011-03		3/16/2011	Initialized			
		S&OP	Build Supply Plan	fxadmin	2011-03		3/18/2011	Initialized			

QAD DM-MW-050

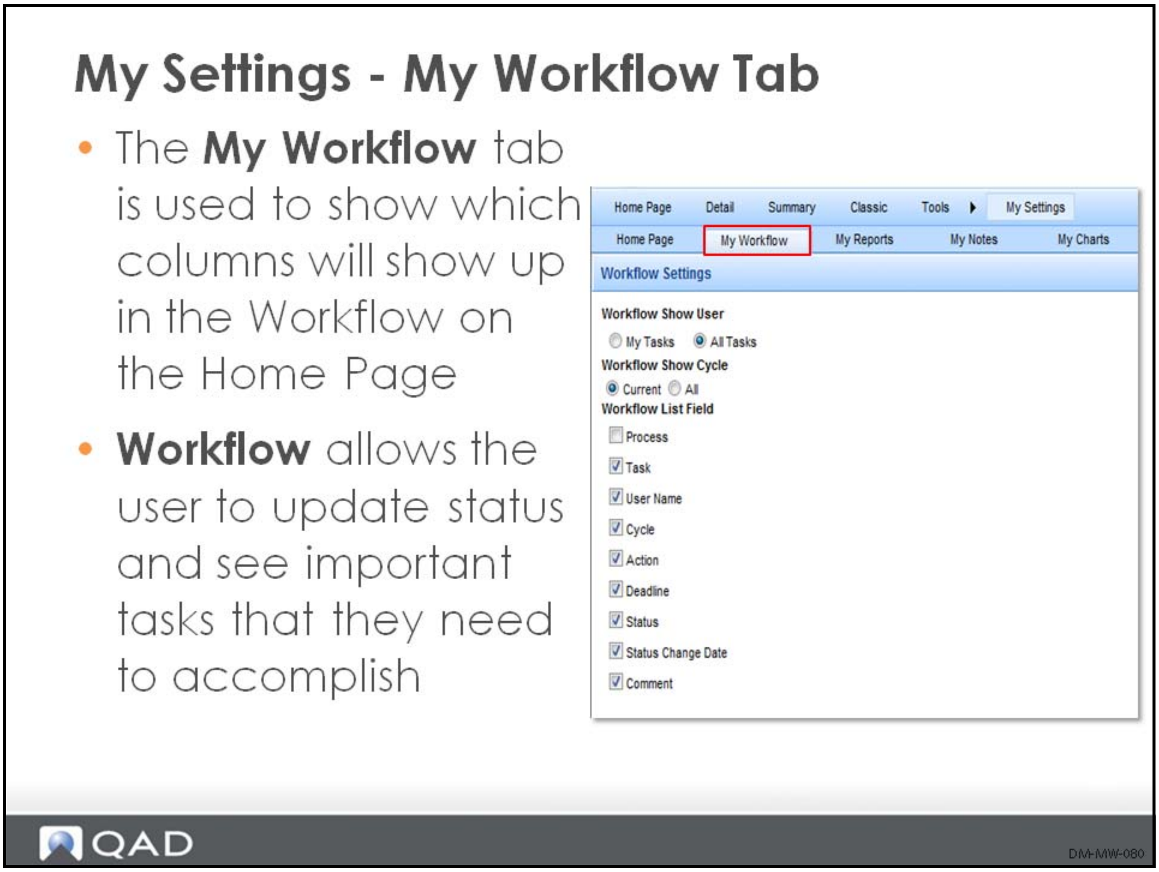
Update Status Graphics



My Settings - My Workflow



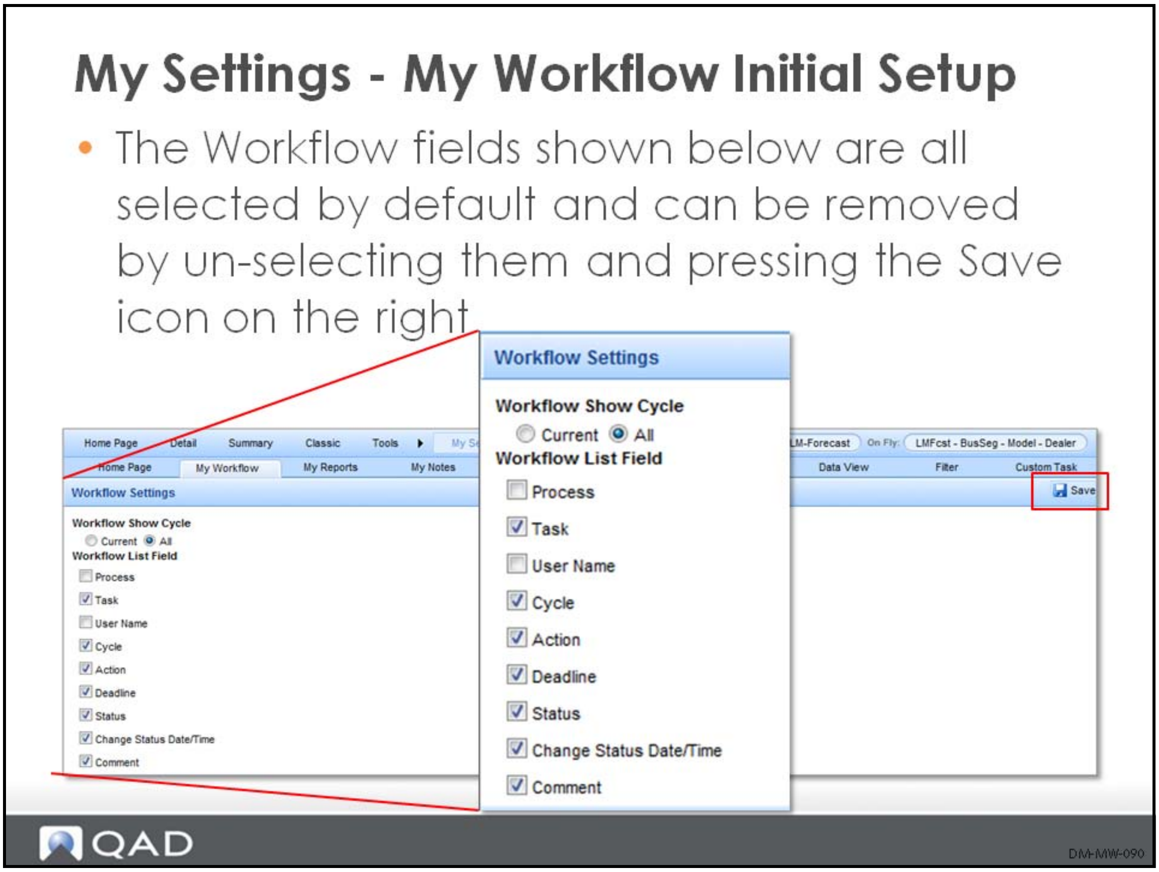
My Settings - My Workflow Tab



My Tasks vs. All – use this to display all tasks or only your tasks:

- Current vs All
  - Current will show tasks and process that are due for this cycle
  - All will show all tasks and processes that a user can see regardless of cycle
- Workflow List Field
  - Process is the group of one or more tasks
  - Task is the task description for the user
  - User Name is the user the task is assigned to
  - Cycle is the period the task is due
  - Action – Actions the user needs to take
    - Options are: Reports, Shortcuts, Exceptions, None
  - Deadline – specific date when the task is due
  - Status – The user will assign the status of the task from the Home Page
  - Select – Use this check box to select the rows for “Change Status”

My Settings - My Workflow Initial Setup



The default setting for Cycle is "Current" and the other option is "All." The current cycle is determined by the current date and where it falls in the demand periods.

My Settings - My Workflow Example

My Settings - My Workflow Example

- In this example we set the Cycles to "All" and removed Process and User Name
- Now the view shows the next cycle's tasks and no longer has the process and user name columns

Select		Task	Cycle	Action	Deadline	Status		Change Status Date/Time	Comment
		Build Supply Plan	2011-03		3/18/2011	In Progress		3/25/2011 11:17:44 AM	
		Conduct Pre-S&OP	2011-03		3/25/2011	In Progress		3/25/2011 11:18:53 AM	Moved Pre-S&OP due to schedule conflict.
		S&OP Meeting	2011-03		3/28/2011	Initialized			
		Update Marketing Plan	2011-04		4/3/2011	Initialized			
		Check Assumptions	2011-04		4/4/2011	Initialized			
		Build Demand Plan	2011-04		4/11/2011	Initialized			
		Conduct Pre-S&OP	2011-04		4/14/2011	Initialized			

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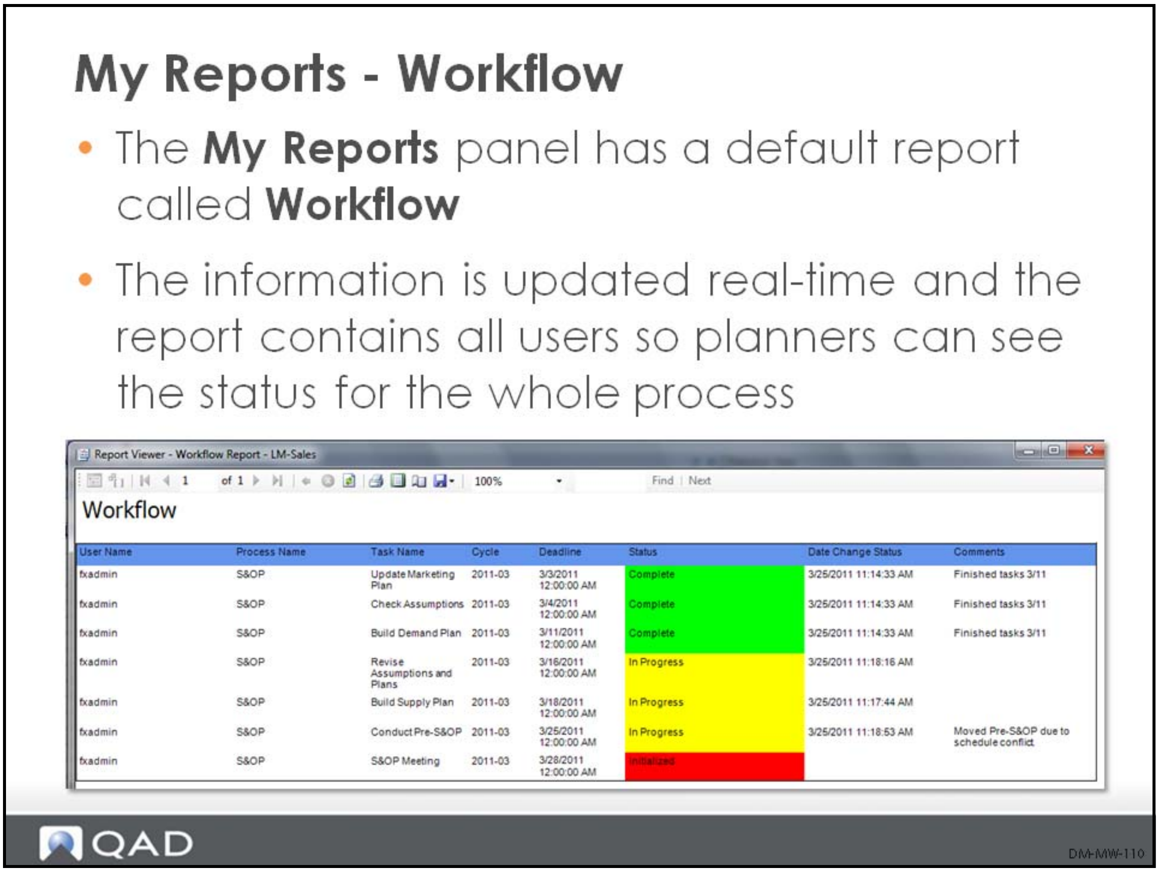
DM-MW-100

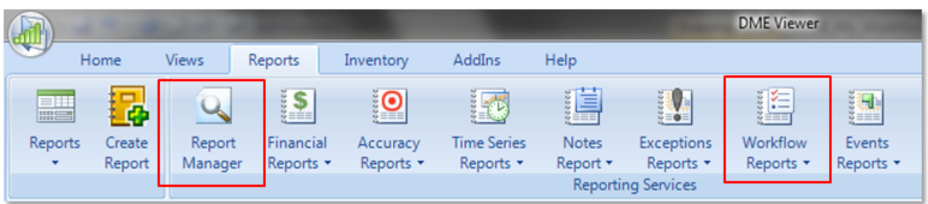
My Reports - Workflow



User Name	Process Name	Task Name	Cycle	Deadline	Status	Date Change Status	Comments
fxadmin	S&OP	Update Marketing Plan	2011-03	3/3/2011 12:00:00 AM	Complete	3/25/2011 11:14:33 AM	Finished tasks 3/11
fxadmin	S&OP	Check Assumptions	2011-03	3/4/2011 12:00:00 AM	Complete	3/25/2011 11:14:33 AM	Finished tasks 3/11
fxadmin	S&OP	Build Demand Plan	2011-03	3/11/2011 12:00:00 AM	Complete	3/25/2011 11:14:33 AM	Finished tasks 3/11
fxadmin	S&OP	Revise Assumptions and Plans	2011-03	3/16/2011 12:00:00 AM	In Progress	3/25/2011 11:18:16 AM	
fxadmin	S&OP	Build Supply Plan	2011-03	3/18/2011 12:00:00 AM	In Progress	3/25/2011 11:17:44 AM	
fxadmin	S&OP	Conduct Pre-S&OP	2011-03	3/25/2011 12:00:00 AM	In Progress	3/25/2011 11:18:53 AM	Moved Pre-S&OP due to schedule conflict
fxadmin	S&OP	S&OP Meeting	2011-03	3/28/2011 12:00:00 AM	Initialized		

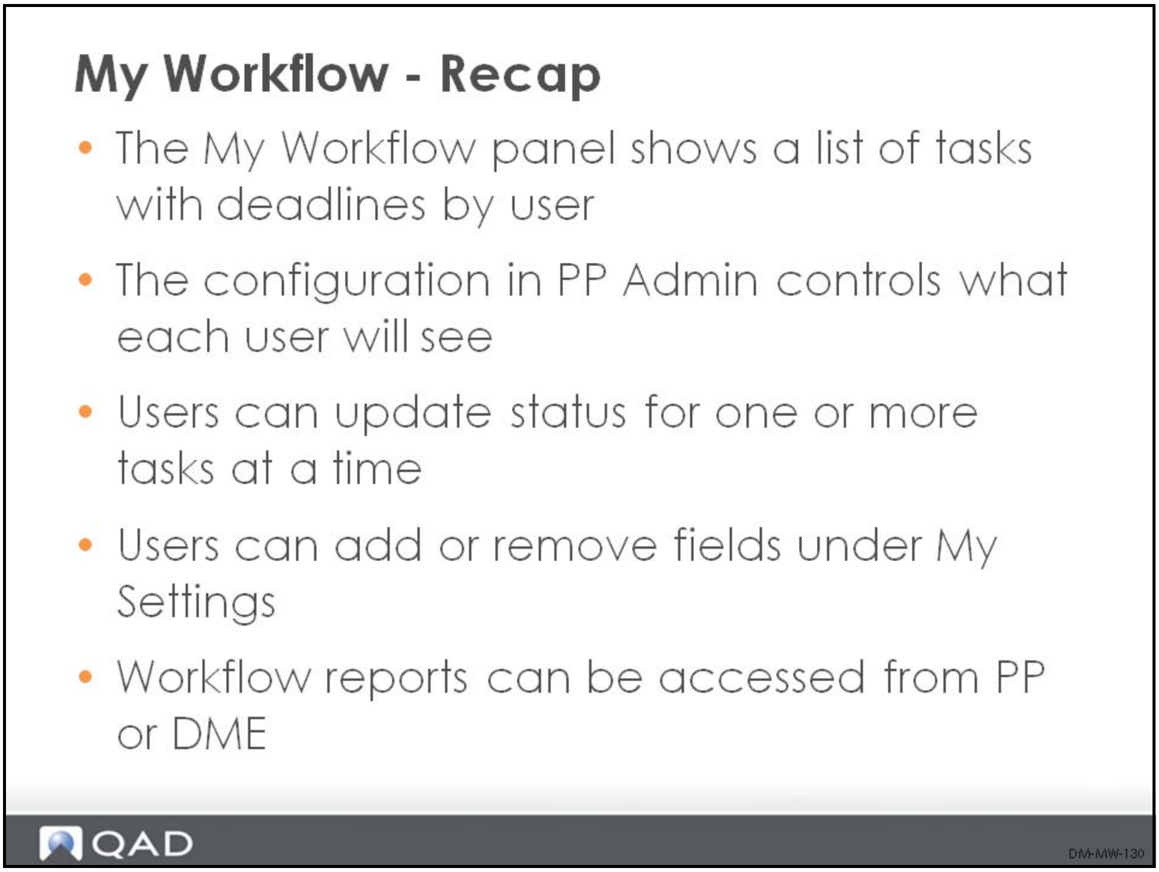
My Reports – Workflow

- The **Workflow** report is also accessible from DME under the **Workflow Reports icon** on the **Reports menu**
- Access for reports in DME and PP is controlled using the Report Manager
    - See the Report Configuration chapter for more information



DM-MW-120

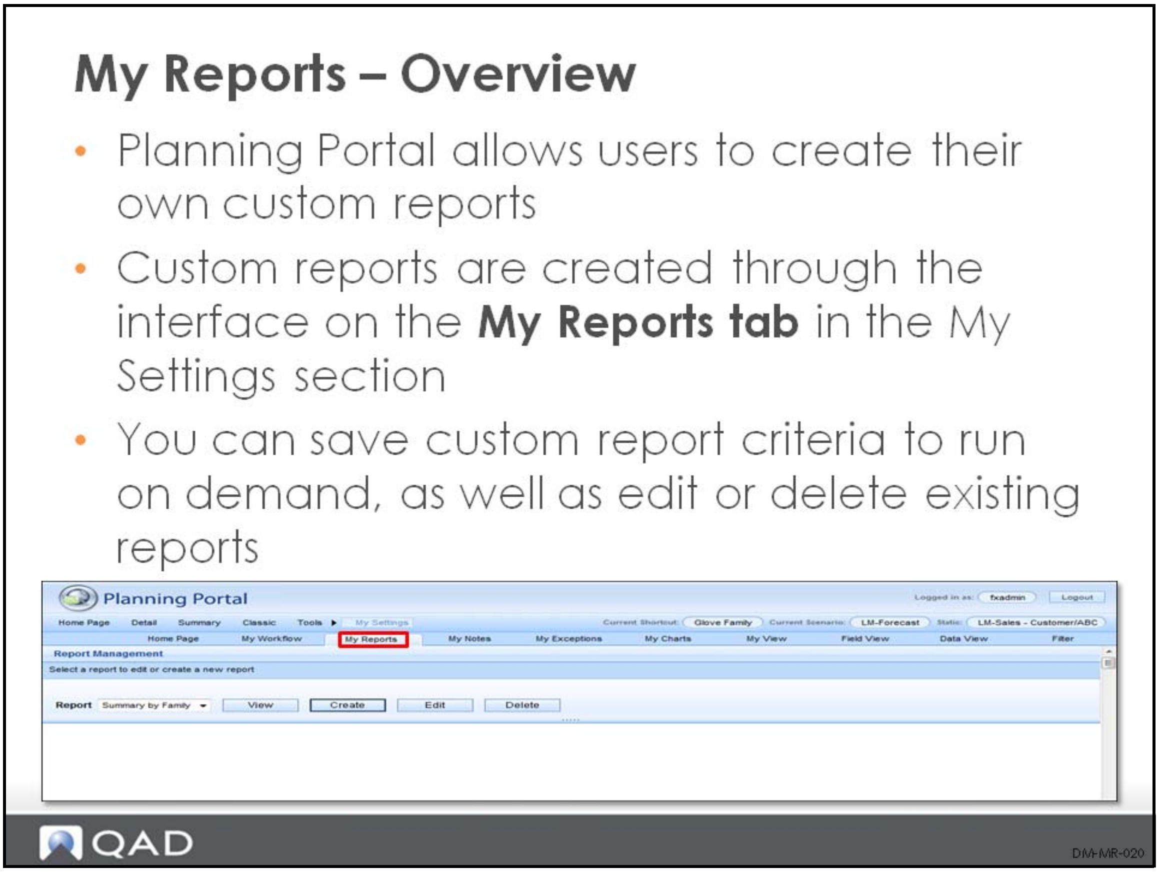
My Workflow - Recap



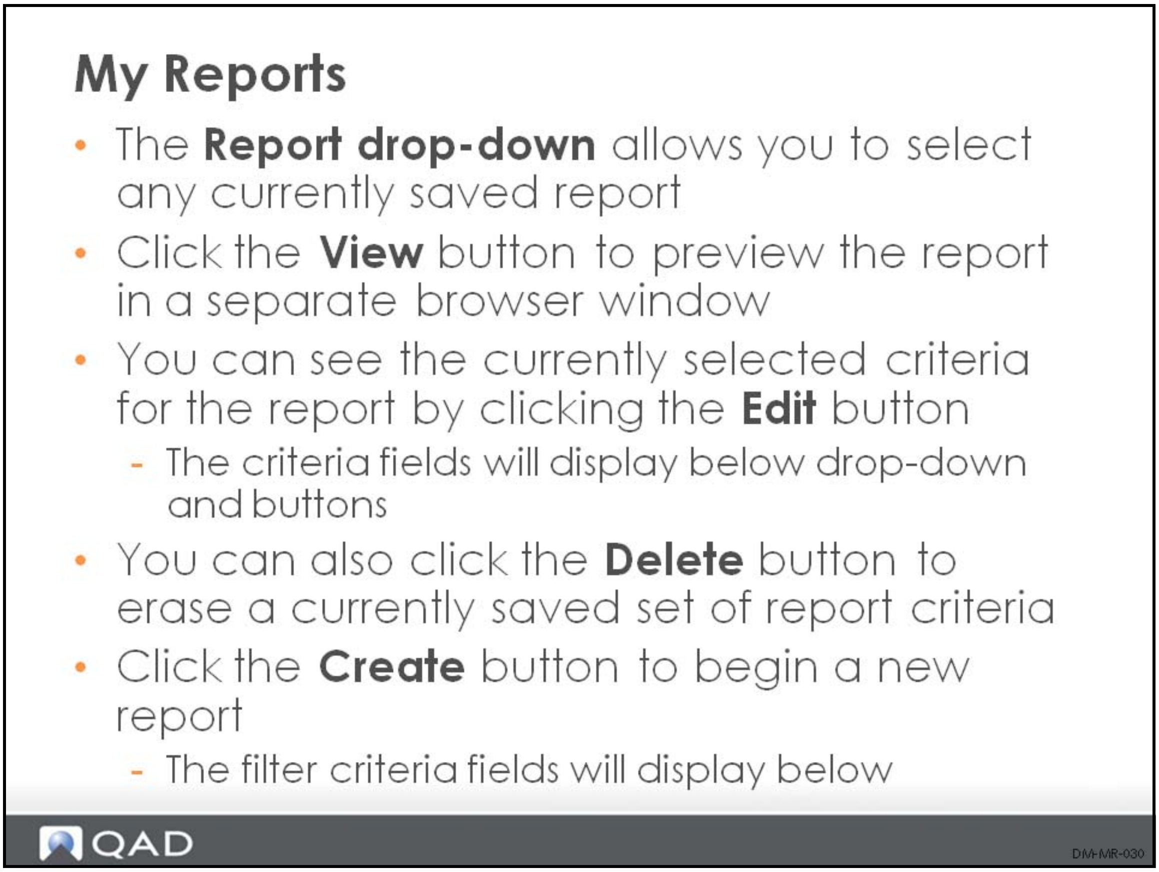
Chapter 5

My Reports

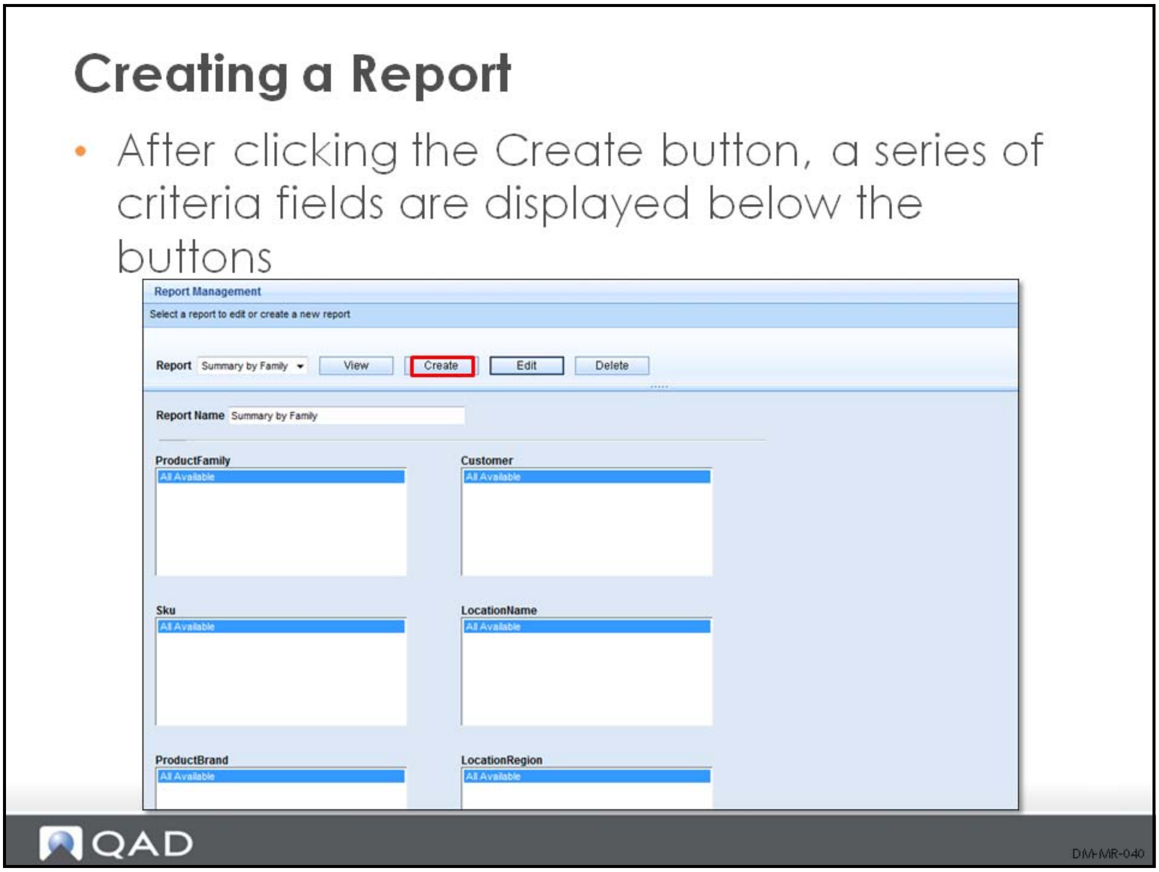
My Reports – Overview



My Reports

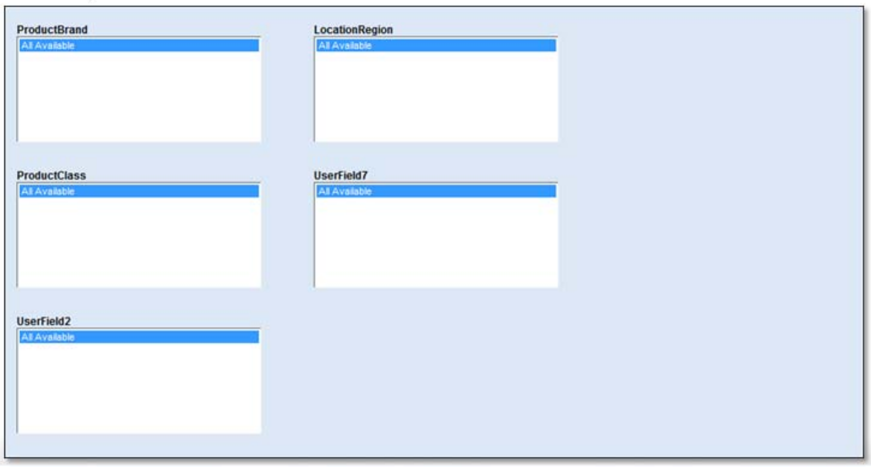

My Reports
The Report drop-down allows you to select any currently saved report
Click the View button to preview the report in a separate browser window
You can see the currently selected criteria for the report by clicking the Edit button
The criteria fields will display below drop-down and buttons
You can also click the Delete button to erase a currently saved set of report criteria
Click the Create button to begin a new report
The filter criteria fields will display below
QAD
DM-MR-030

Creating a Report



Creating a Report

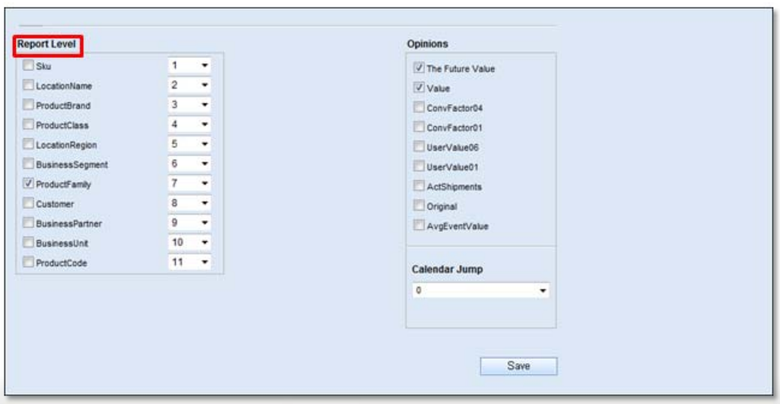
- Select criteria from the different fields to create your custom report
- The available filter criteria are configured by the System Administrator



DM-MR-050

Creating a Report

- In the **Report Level** area, select one or more Report Level options that you have configured
  - Use the numbered drop-downs to organize the order in which the options display from left to right



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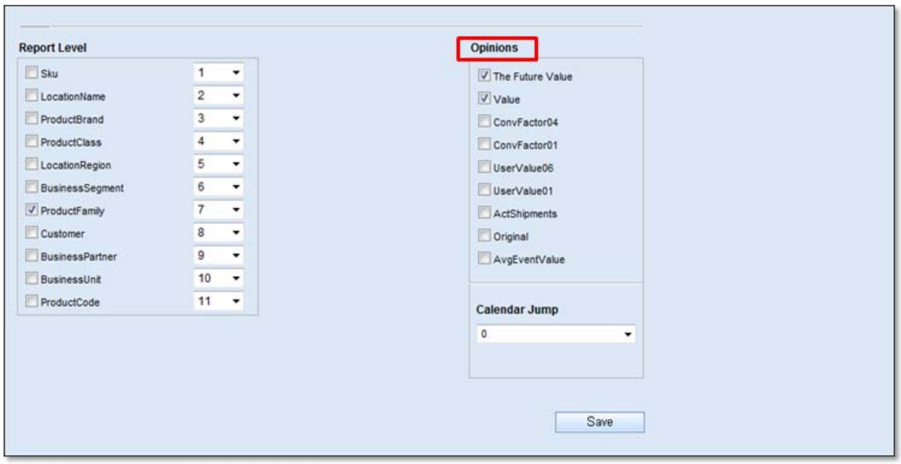
DM-MR-060

Creating a Report

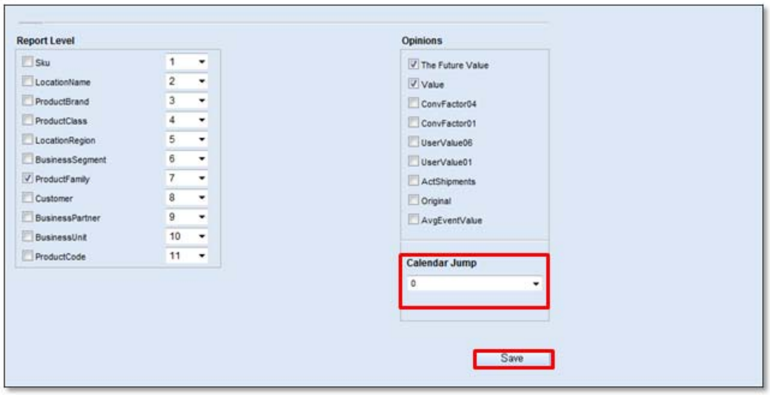
- In the **Opinions** section, use the check boxes to select the Opinion Lines you want to use in the report



DM-MR-

Creating a Report

- The Calendar Jump field allows you to indicate the month at which you want your data to begin



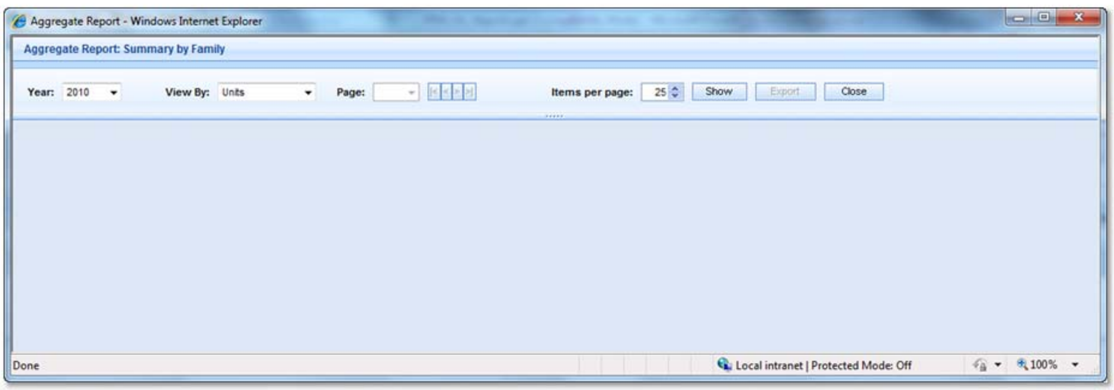
- Click the Save button when finished
  - The report can now be added to display in the My Reports panel on the Home Page

DM-MR-070

Previewing a Report

Previewing a Report

- Select the report you want to preview from the Report drop-down
- Click the View button
  - A separate browser window opens and allows you to select additional criteria for the report



DMI-MR-080

Previewing a Report

- Select the year from the **Year** drop down box
- Select the viewing criteria from the **View By** drop down box
- Click the **Show** button to display the report

Aggregate Report: My New Report

Year: 2009 View By: Units Page: 1 |< < > >| Items per page: 25 Show Export Close

Sku	LocationNa	Opinion	Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1649492C2		The Future Va	2009	1,993.00	1,307.00	1,126.00	501.00	271.00	376.00	222.00	922.00	1,840.00
1649492C2		Original	2009	2,548.00	1,775.00	1,593.00	868.00	558.00	752.00	494.00	1,339.00	1,993.00
1649492C2		UserValue01	2009	2,250.00	1,837.00	1,674.00	913.00	606.00	850.00	582.00	1,706.00	2,951.00
1807455C92		The Future Va	2009	533.00	501.00	481.00	393.00	330.00	340.00	306.00	469.00	628.00
1807455C92		Original	2009	680.00	680.00	680.00	680.00	680.00	680.00	680.00	680.00	680.00
1807455C92		UserValue01	2009	680.00	680.00	680.00	680.00	680.00	680.00	680.00	680.00	680.00
1818402C2		The Future Va	2009	92.00	32.00	44.00	33.00	58.00	33.00	118.00	20.00	24.00
1818402C2		Original	2009	42.00	39.00	36.00	33.00	30.00	27.00	24.00	21.00	17.00
1818402C2		UserValue01	2009	42.00	39.00	36.00	33.00	30.00	27.00	24.00	21.00	17.00

QAD DM-MR-090

Previewing a Report

- Use the **Page** field to scroll through the Report Data
- The **Items per Page** field allows you to select how many records are shown on each page of the report
  - Click the Export button to save the report data as an Excel spreadsheet

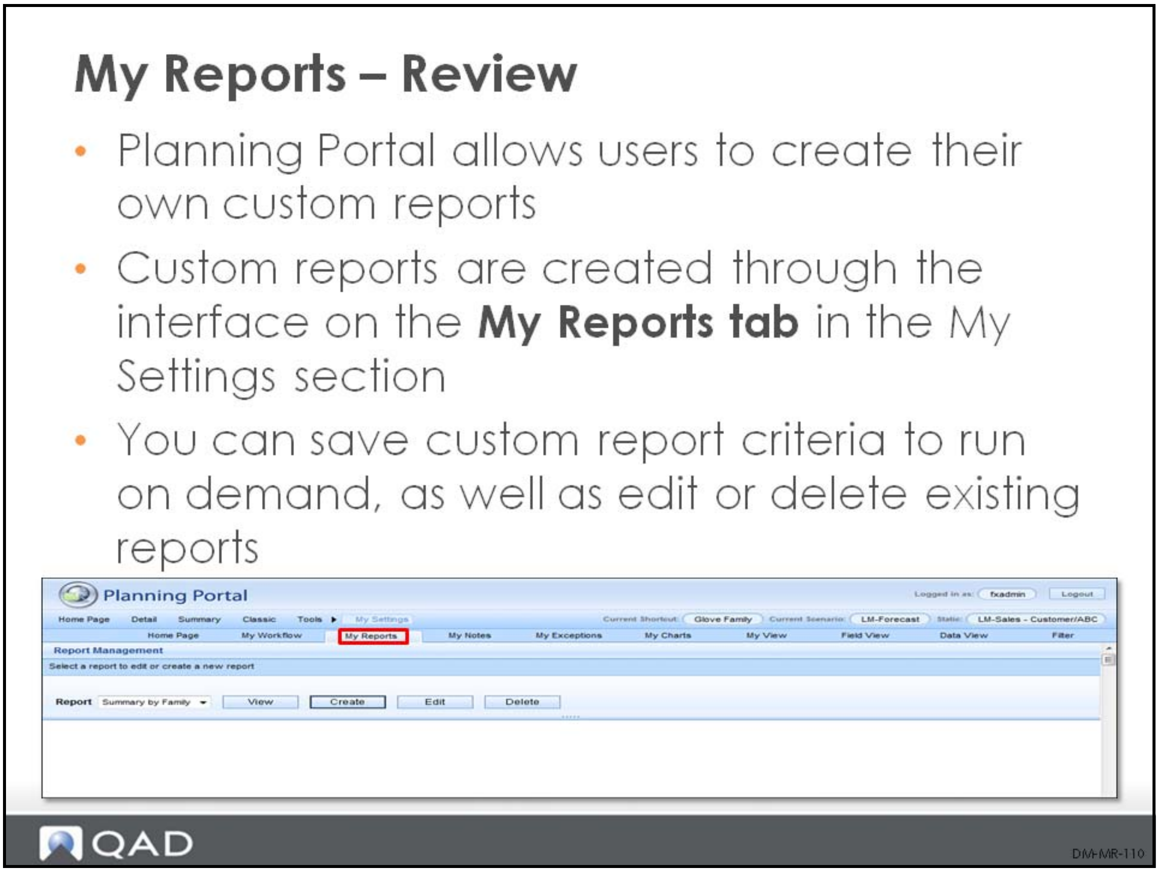
Aggregate Report: My New Report

Year: 2009 View By: Units Page: 1 |< < > >| Items per page: 25 Show Export Close

Sku	LocationNa	Opinion	Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1649492C2		The Future Va	2009	1,993.00	1,307.00	1,126.00	501.00	271.00	376.00	222.00	922.00	1,840.00
1649492C2		Original	2009	2,548.00	1,775.00	1,593.00	868.00	558.00	752.00	494.00	1,339.00	1,993.00
1649492C2		UserValue01	2009	2,250.00	1,837.00	1,674.00	913.00	606.00	850.00	582.00	1,706.00	2,951.00
1807455C92		The Future Va	2009	533.00	501.00	481.00	393.00	330.00	340.00	306.00	469.00	628.00
1807455C92		Original	2009	680.00	680.00	680.00	680.00	680.00	680.00	680.00	680.00	680.00
1807455C92		UserValue01	2009	680.00	680.00	680.00	680.00	680.00	680.00	680.00	680.00	680.00
1818402C2		The Future Va	2009	92.00	32.00	44.00	33.00	58.00	33.00	118.00	20.00	24.00
1818402C2		Original	2009	42.00	39.00	36.00	33.00	30.00	27.00	24.00	21.00	17.00
1818402C2		UserValue01	2009	42.00	39.00	36.00	33.00	30.00	27.00	24.00	21.00	17.00

QAD DM-MR-100

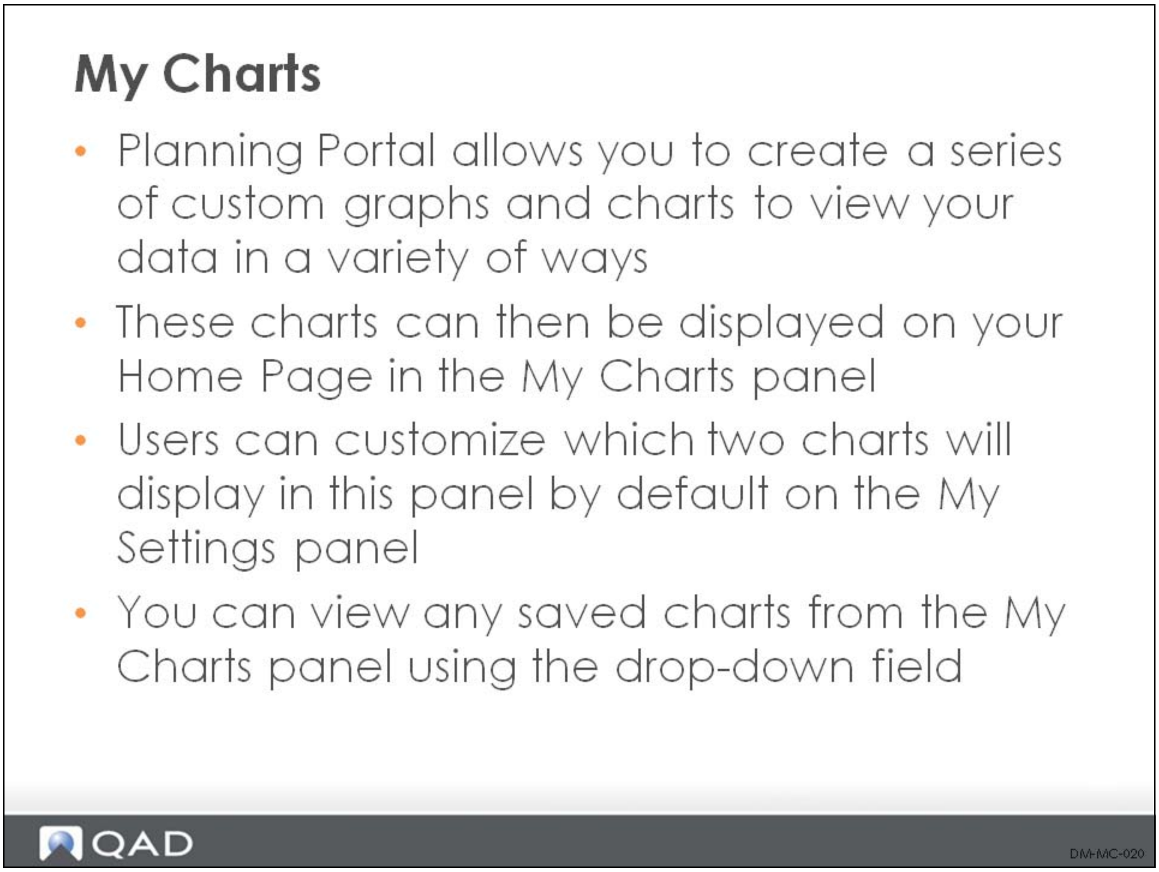
My Reports – Review



Chapter 6

My Charts

My Charts


My Charts
• Planning Portal allows you to create a series of custom graphs and charts to view your data in a variety of ways
• These charts can then be displayed on your Home Page in the My Charts panel
• Users can customize which two charts will display in this panel by default on the My Settings panel
• You can view any saved charts from the My Charts panel using the drop-down field
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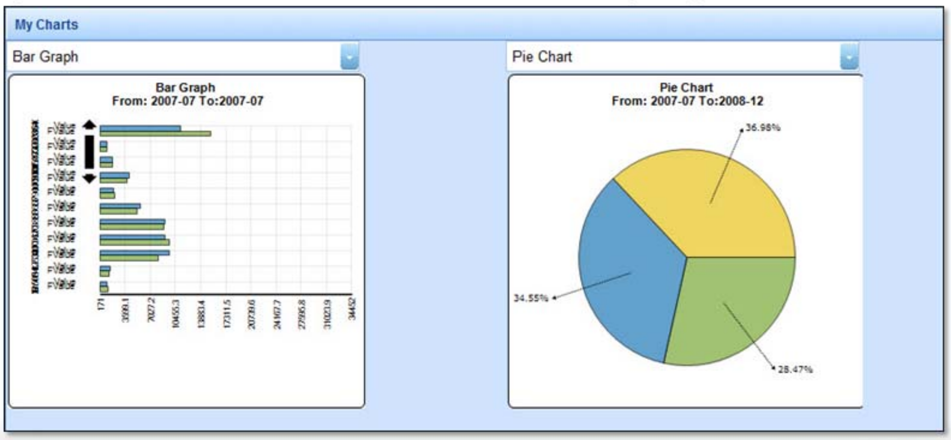
DM-MC-020

My Charts Home Page

My Charts Home Page

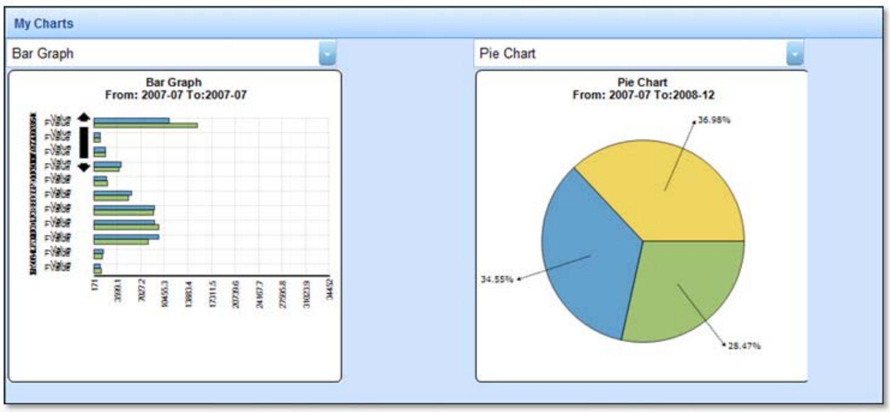
- The **My Charts** panel allows you to view a graphical representation of the data in a variety of formats
- Two charts can be displayed in this panel at a time, and the drop-down menus above each chart allow you to select which charts are displayed



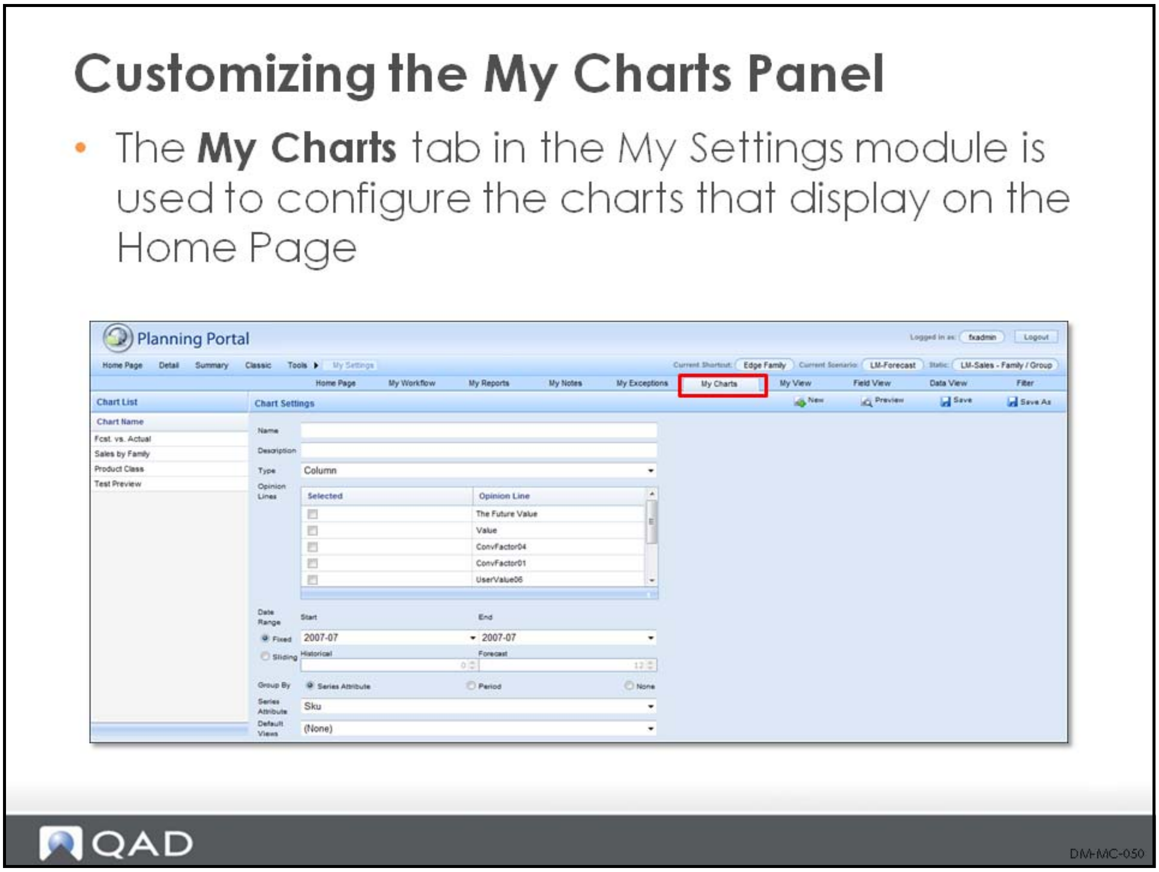
DM-MC-030

My Charts Home Page

- If the user only has one chart created, it will display in the My Charts panel twice
- The criteria and settings for these charts can be selected in the My Settings portion of Planning Portal

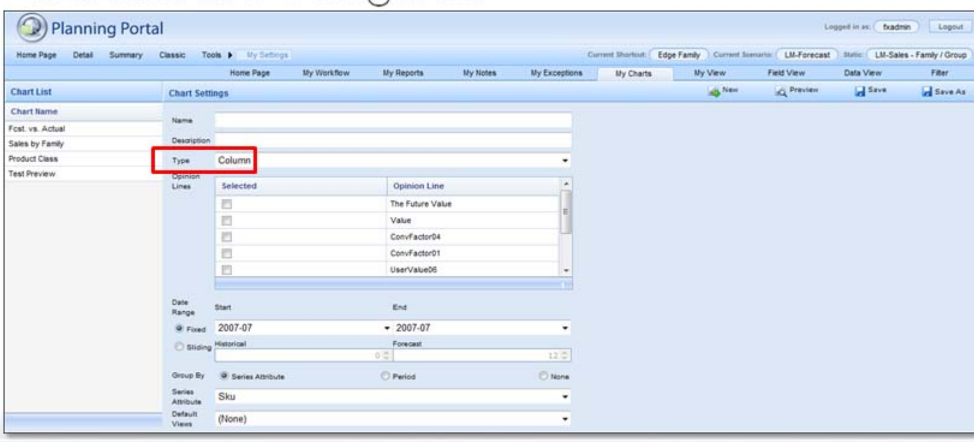


Customizing the My Charts Panel

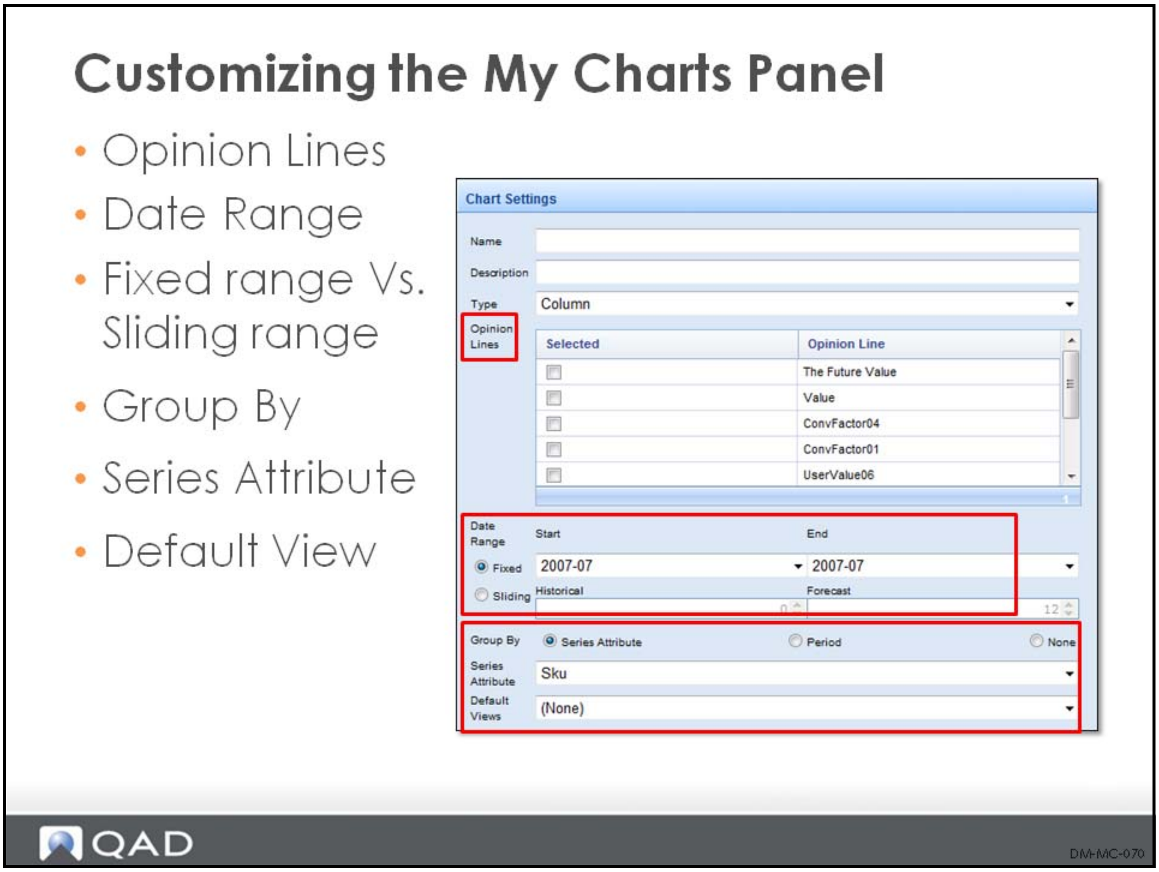


Customizing the My Charts Panel

- There are eight different types of charts and graphs that you can display on the **My Charts** panel: Column, Stacked Column, Bar, Stacked Bar, Line, Pie, Doughnut, and Concentric Doughnut



DM-MC-060



- In the Opinion Lines section, use the check boxes to select the lines you want to use to generate the charts
- In the Date Range field, set the time frame for the data used to generate the chart
  - Choose either a Fixed range (specific start and end dates) or a Sliding range (for example, a six month range that varies based on the current date)
- Use the Group By radio buttons to indicate whether the data is sorted based on either the Series Attribute or the time Period
- The Series Attribute drop-down allows you to choose an a specific attribute to group by. This field is only active if the Series Attribute option is selected in the Group By field
- The Default View drop-down is used to apply a custom view to the data when creating the chart

My Charts - Recap

My Charts - Recap

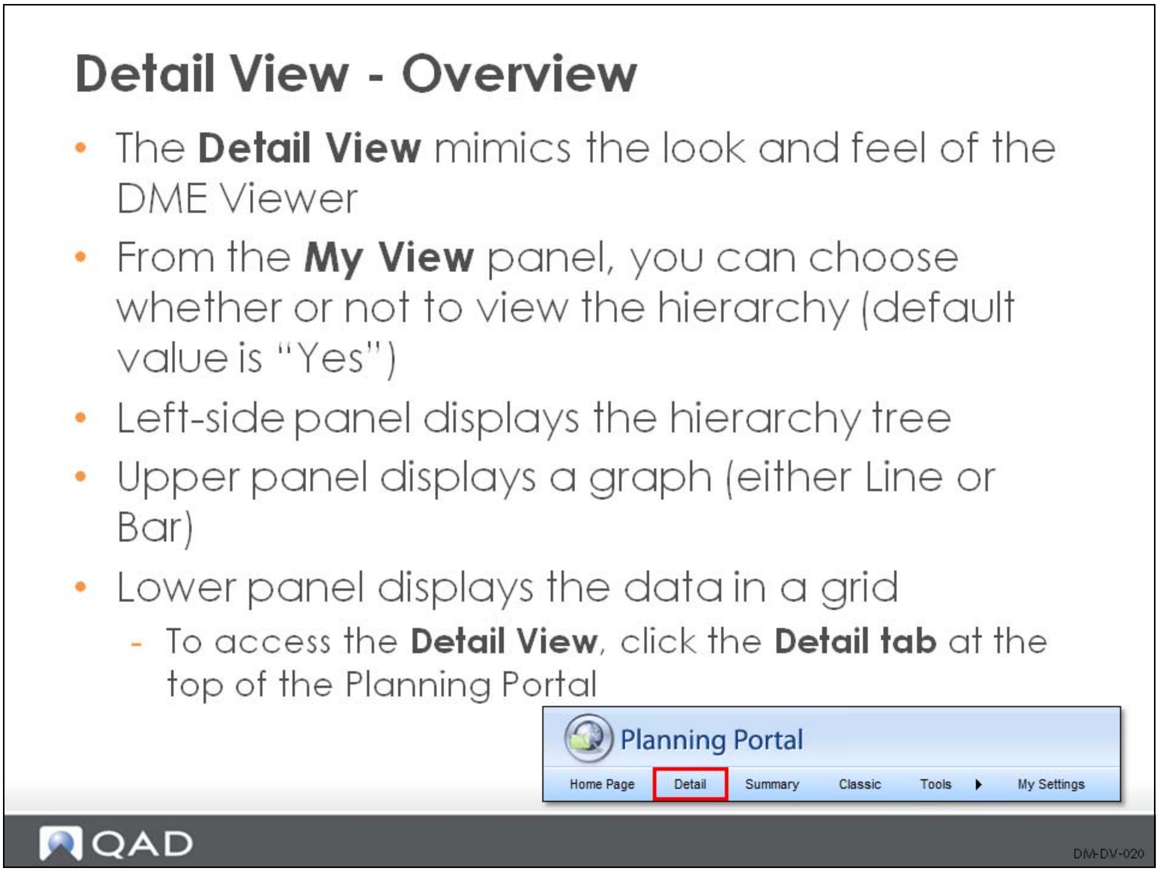
- Planning Portal allows you to create a series of custom graphs and charts to view your data in a variety of ways
- These charts can then be displayed on your Home Page in the **My Charts** panel
- Users can customize which two charts will display in this panel by default on the **My Settings** panel
- You can view any saved charts from the My Charts panel using the drop-down field

QAD DM-MC-080

Chapter 7

Detail View

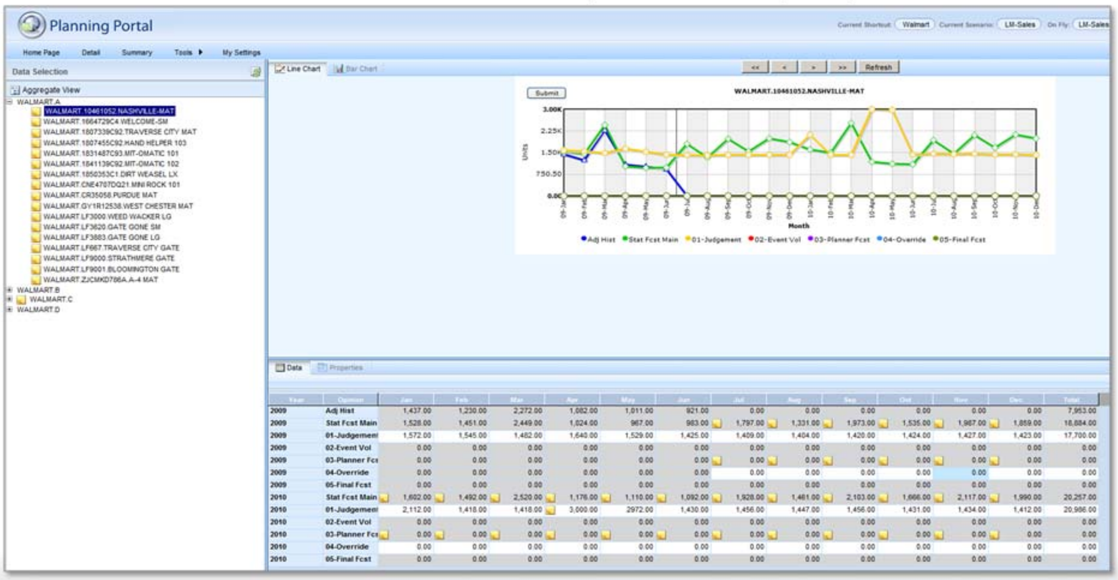
Detail View - Overview



Detail View

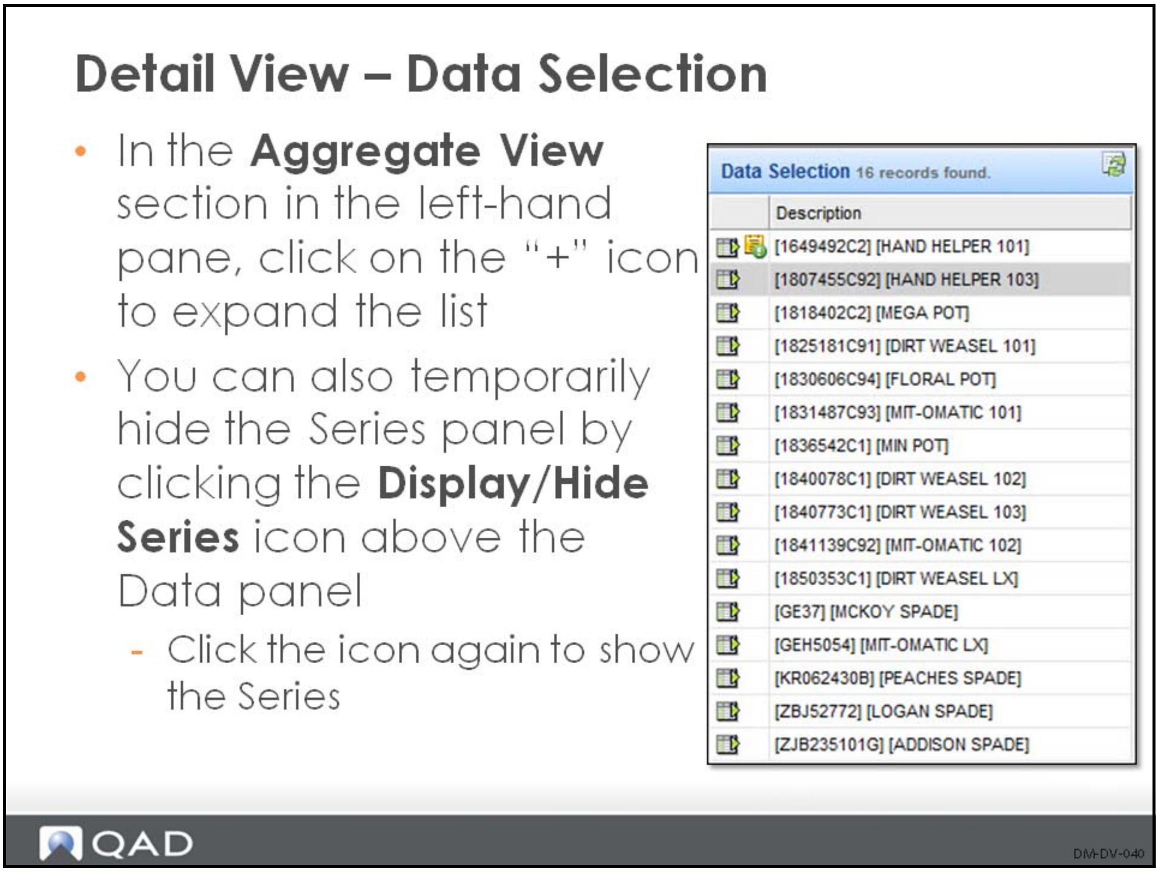
Detail View

- The **Detail View** allows you to view individual items with the hierarchy tree displayed

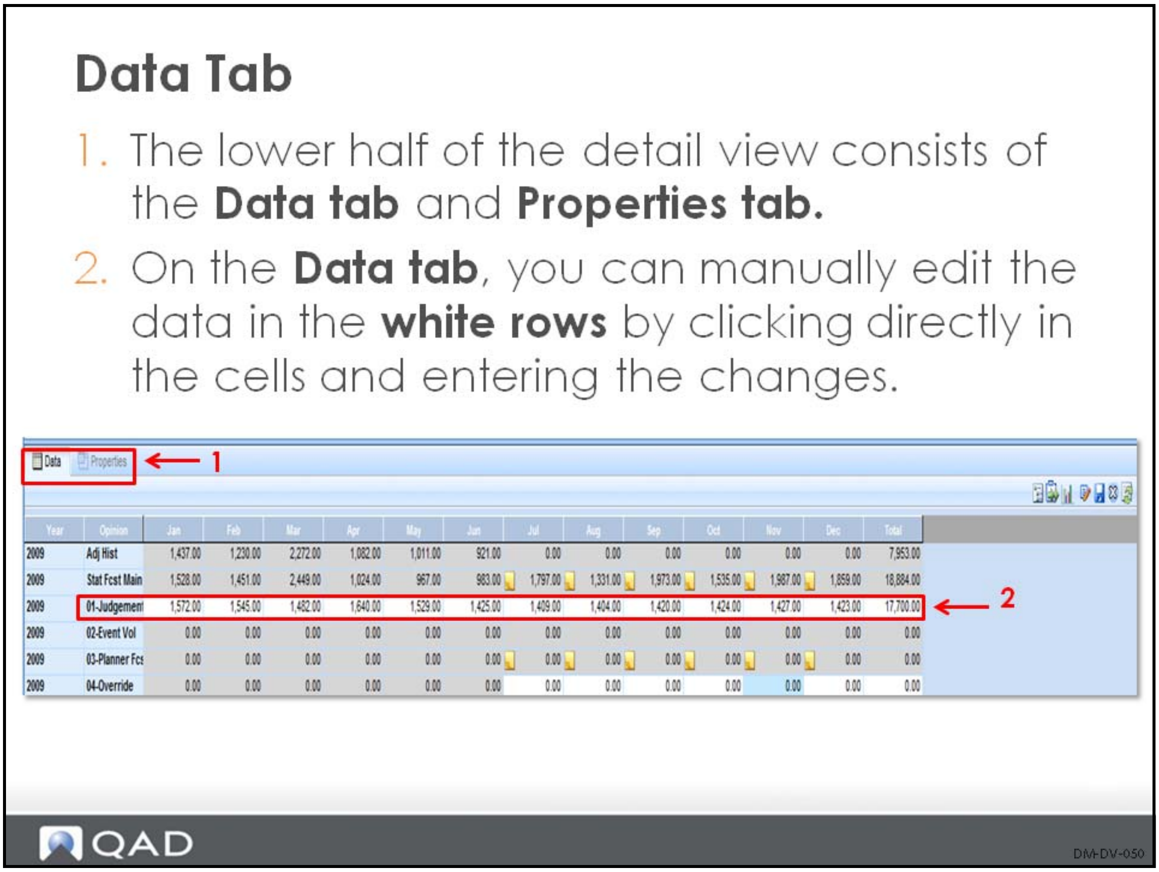


DM-DV-030

Detail View – Data Selection

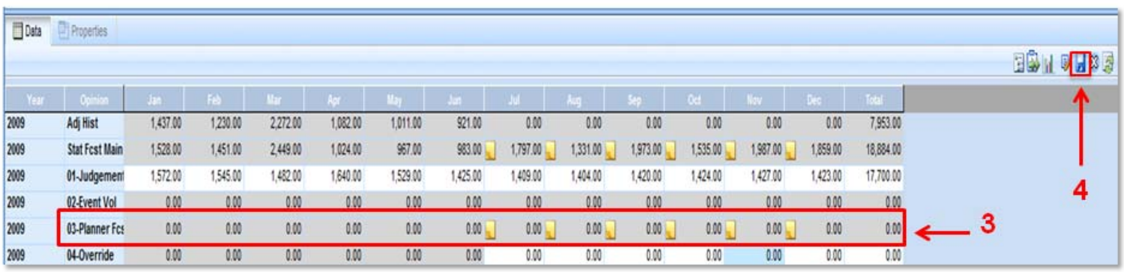


Data Tab


Data Tab
1. The lower half of the detail view consists of the **Data tab** and **Properties tab.**
2. On the **Data tab**, you can manually edit the data in the **white rows** by clicking directly in the cells and entering the changes.
Data
Properties
1
Year Opinion Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Total
2009 Adj Hist 1,437.00 1,230.00 2,272.00 1,082.00 1,011.00 921.00 0.00 0.00 0.00 0.00 0.00 0.00 7,953.00
2009 Stat Fcst Main 1,528.00 1,451.00 2,449.00 1,024.00 967.00 983.00 1,797.00 1,331.00 1,973.00 1,535.00 1,987.00 1,859.00 18,884.00
2009 01-Judgemen 1,572.00 1,545.00 1,482.00 1,640.00 1,529.00 1,425.00 1,409.00 1,404.00 1,420.00 1,424.00 1,427.00 1,423.00 17,700.00
2
2009 02-Event Vol 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
2009 03-Planner Fcs 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
2009 04-Override 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00
QAD
DM-DV-050

Data Tab

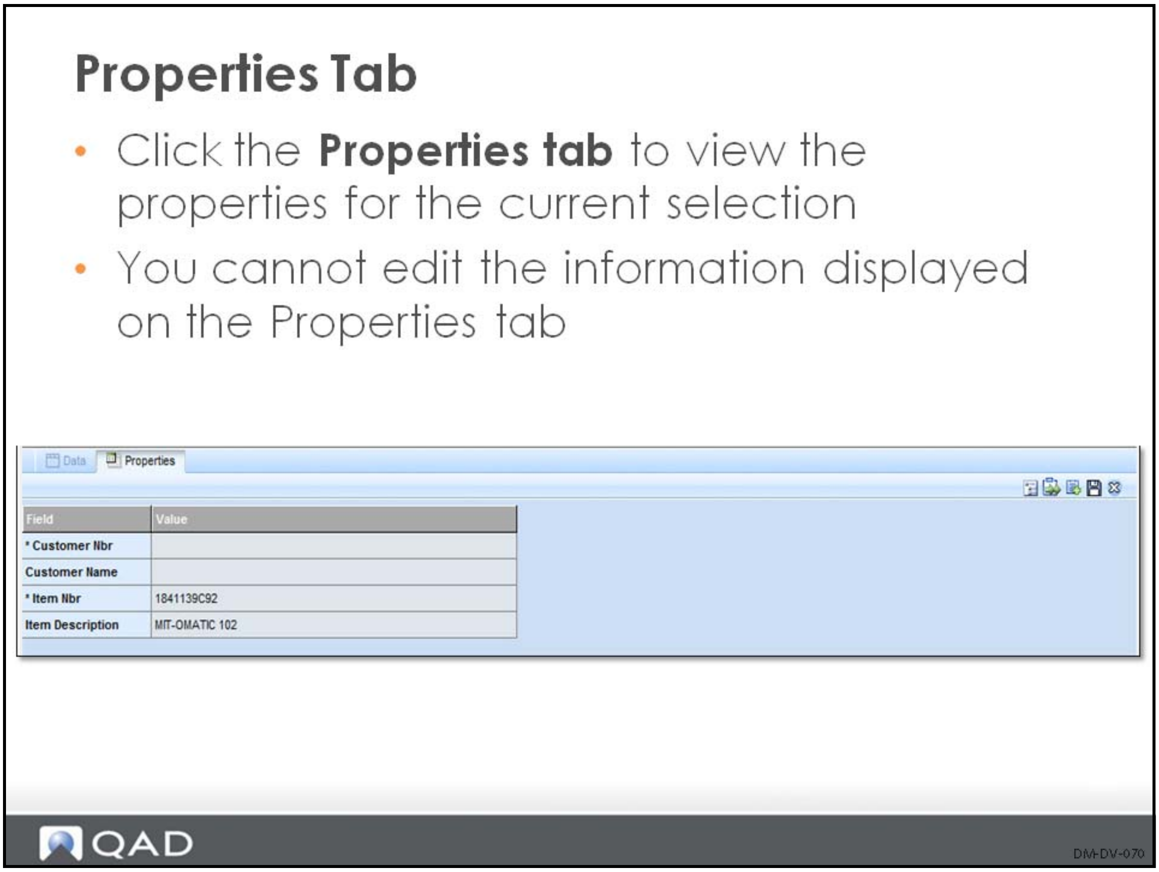
3. You **cannot** make changes in the **grayed-out rows.**
4. Click the **Save icon** when finished to save your changes.



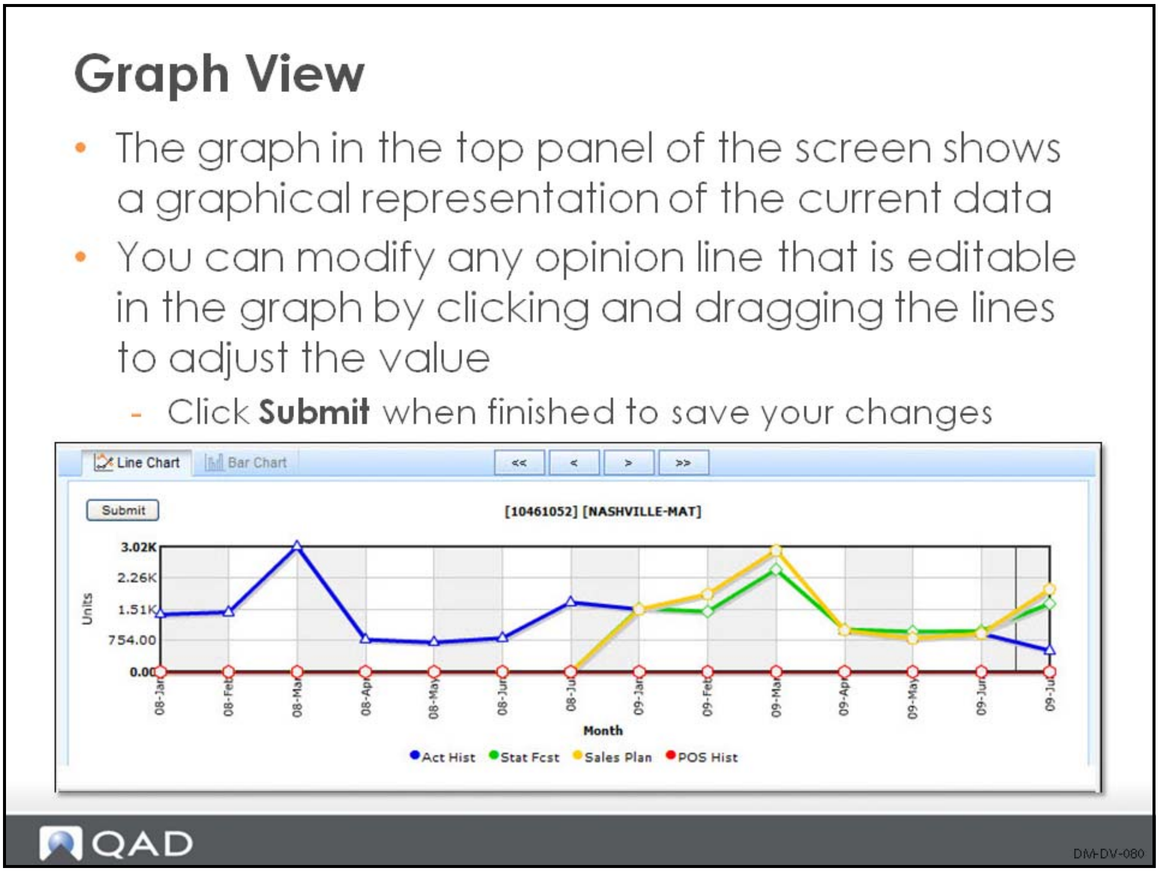
Year	Opinion	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2009	Adj Hist	1,437.00	1,230.00	2,272.00	1,082.00	1,011.00	921.00	0.00	0.00	0.00	0.00	0.00	0.00	7,953.00
2009	Stat Fcst Main	1,528.00	1,451.00	2,449.00	1,024.00	967.00	983.00	1,797.00	1,331.00	1,973.00	1,535.00	1,987.00	1,859.00	18,884.00
2009	01-Judgement	1,572.00	1,545.00	1,482.00	1,640.00	1,529.00	1,425.00	1,409.00	1,404.00	1,420.00	1,424.00	1,427.00	1,423.00	17,700.00
2009	02-Event Vol	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2009	03-Planner Fcs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2009	04-Override	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

QAD DM-DV-060

Properties Tab

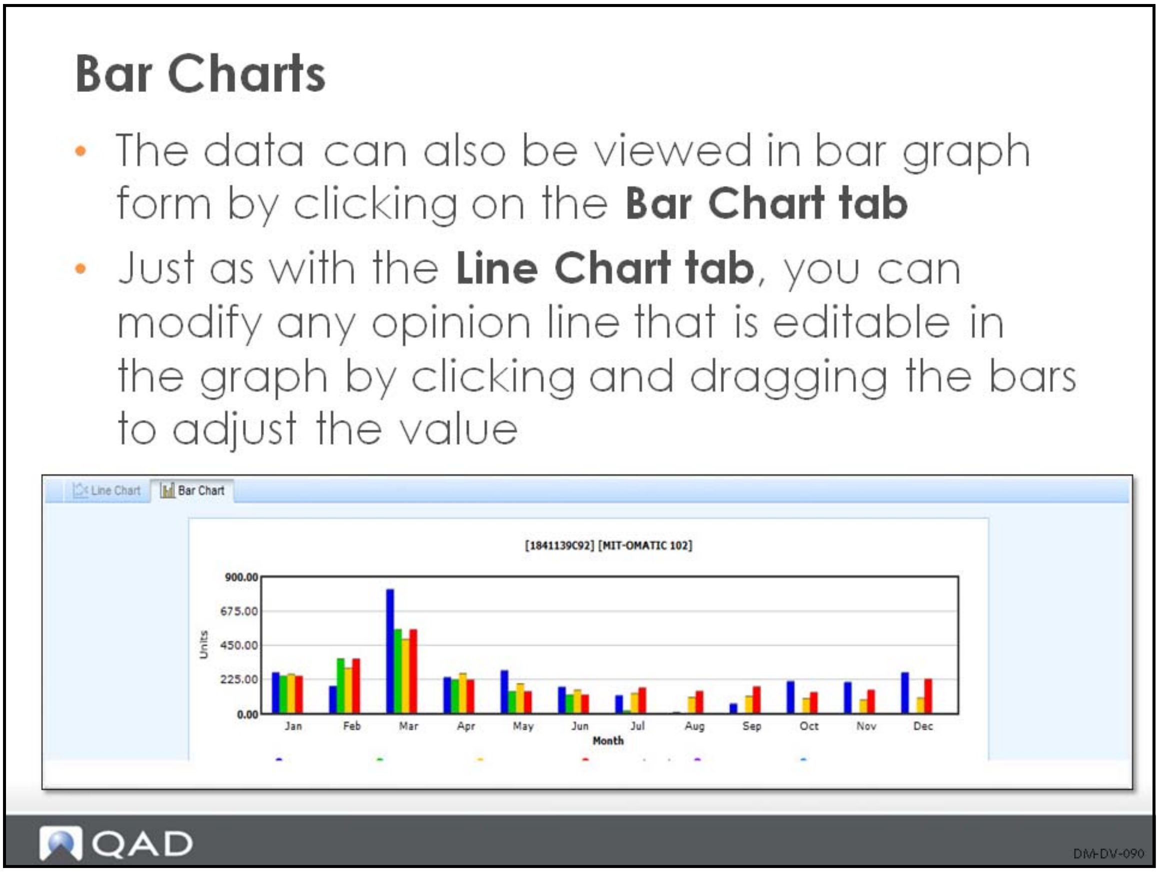


Graph View



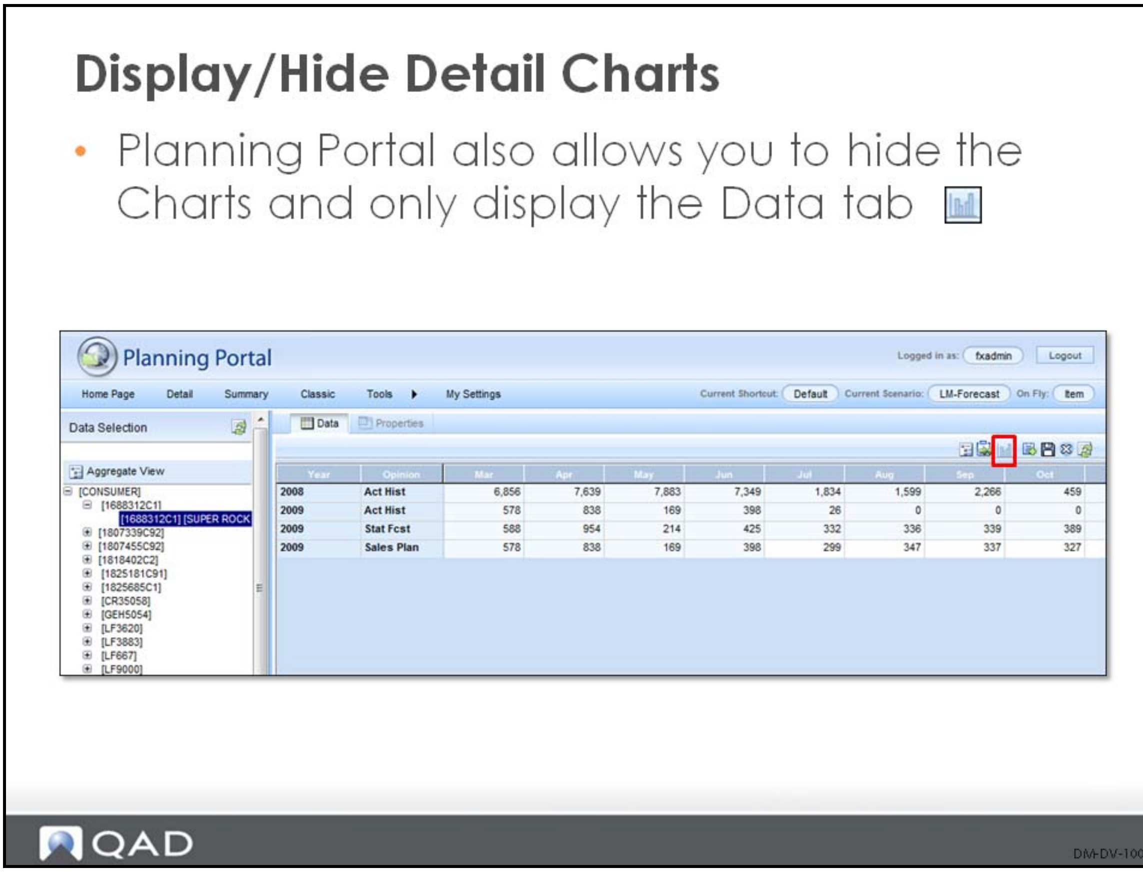
To determine if an opinion line is editable, look at the Data Tab. If the observation is in a white cell, it can be modified. If the observation is in a grayed-out cell, it cannot be modified.

Bar Charts



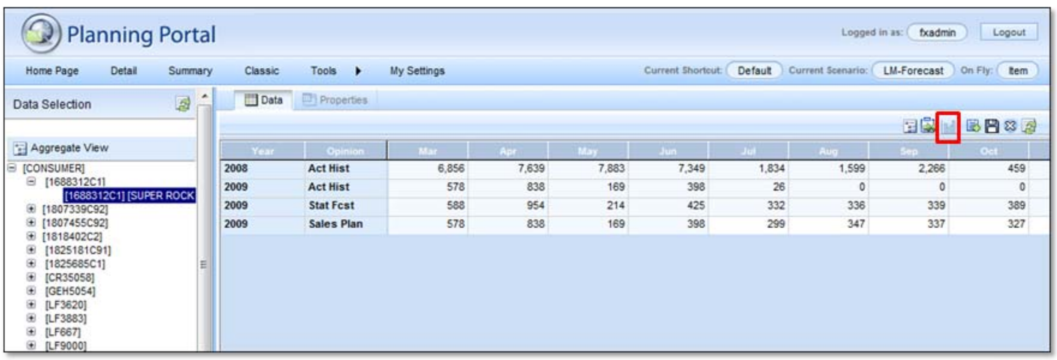
To determine if an opinion line is editable, look at the Data Tab. If the observation is in a white cell, it can be modified. If the observation is in a grayed-out cell, it cannot be modified.

Display/Hide Detail Charts



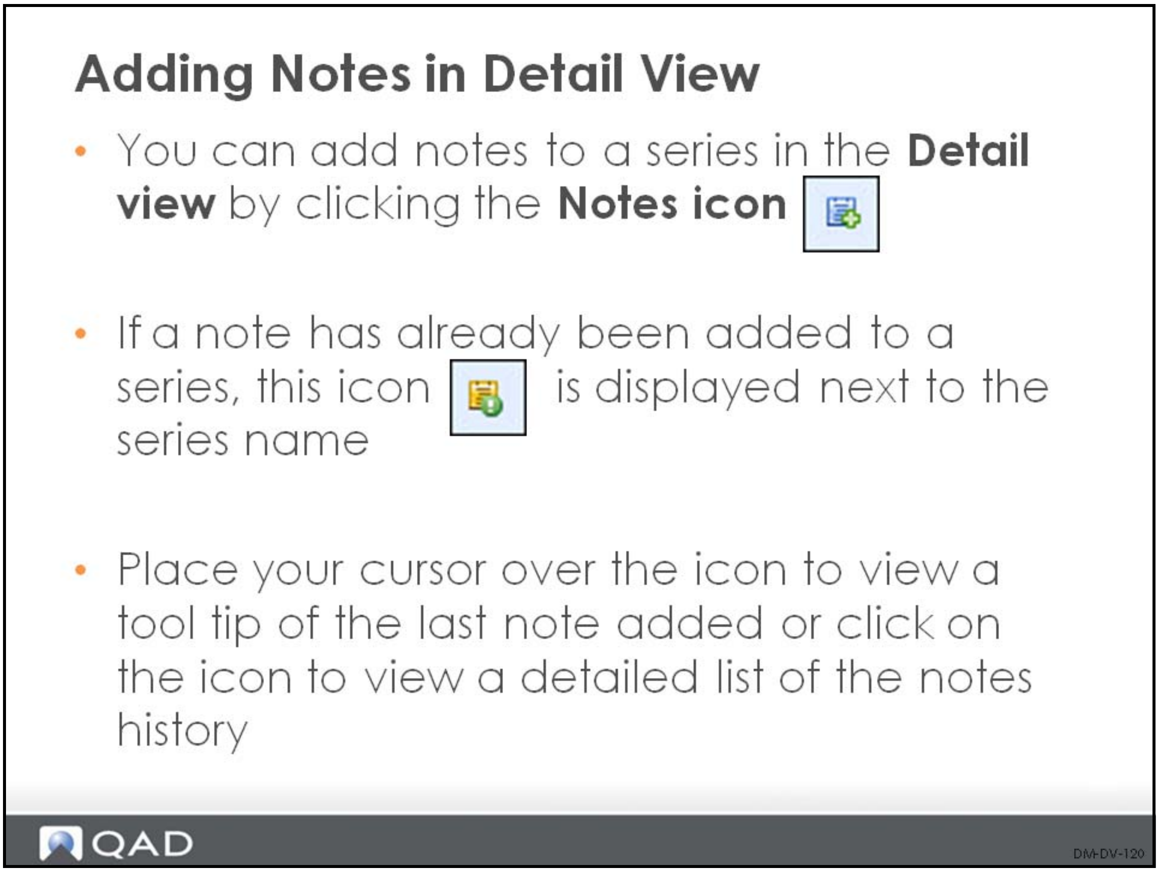
Display/Hide Detail Charts

- Click the **Display/Hide Detail Charts icon** above the Data panel and the graphs will no longer display and the Data panel is moved to the top of the screen
  - Click the icon again to display the graphs

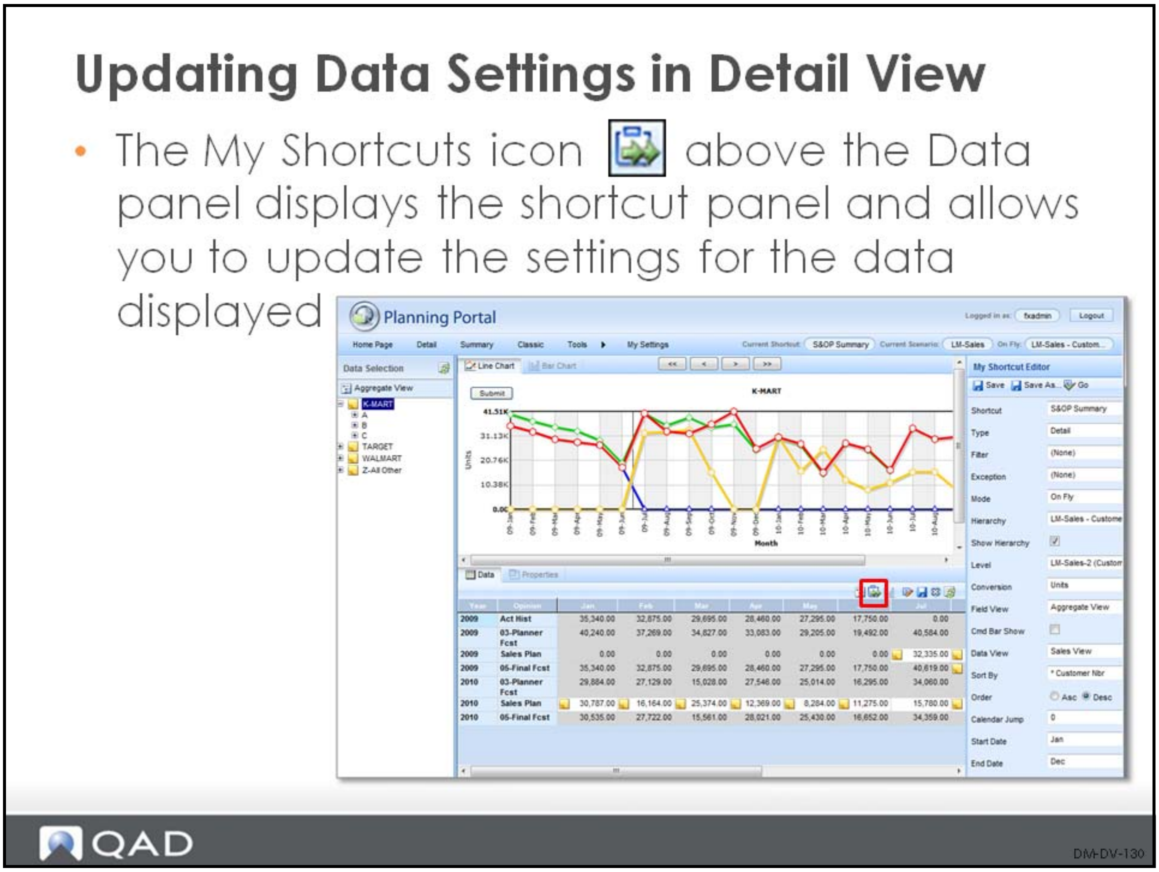


DM-DV-110

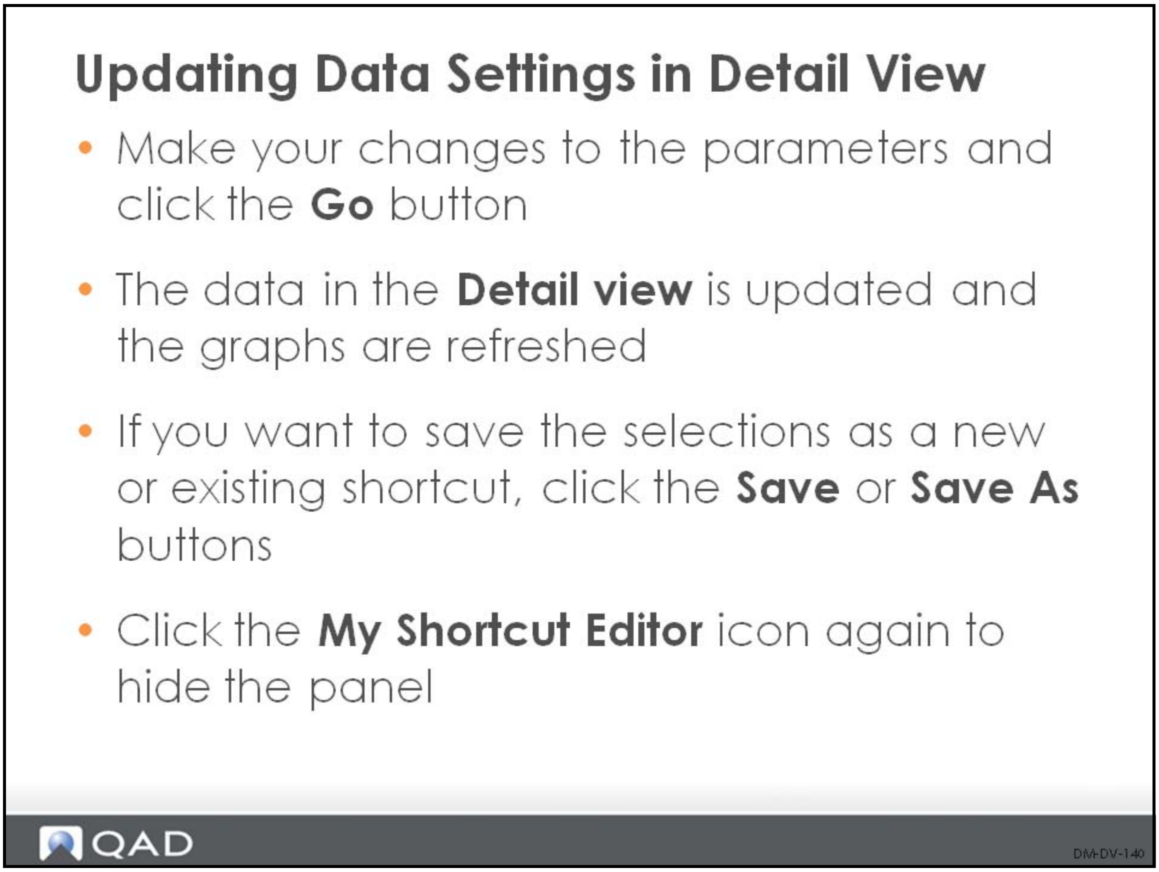
Adding Notes in Detail View



Updating Data Settings in Detail View



Updating Data Settings in Detail View



Detail View - Review

Detail View - Review

- The **Detail View** mimics the look and feel of the DME Viewer
- From the **My View** panel, you can choose whether or not to view the hierarchy
- Left-side panel displays the hierarchy tree
- Upper panel displays a graph (either Line or Bar)
- Lower panel displays the data in a grid
- You can make changes directly into the Planning Portal

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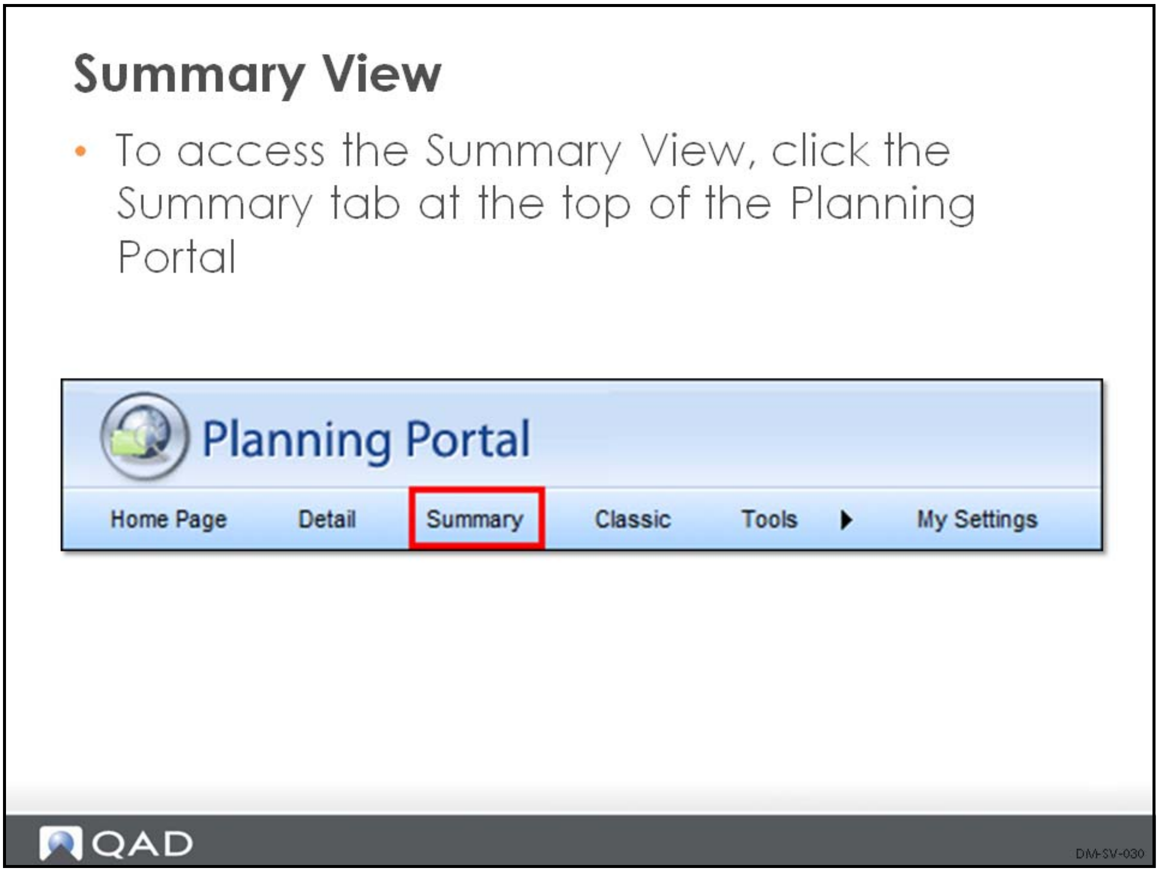
Chapter 8

Summary View

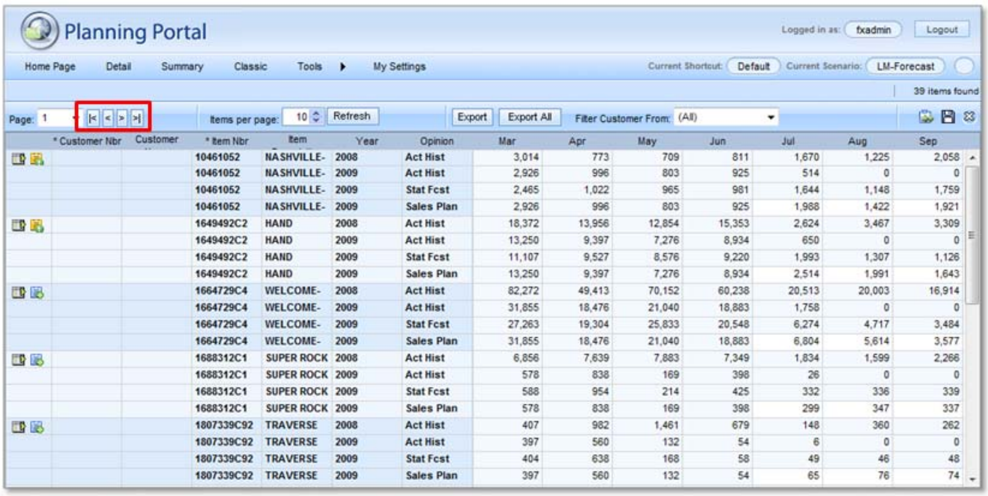
Summary View - Overview

Summary View



Summary View

- Use the |< < > >| buttons to scroll through the pages of the Summary View, or use the Page drop-down to select a specific page to view



* Customer Nbr	Customer	* Item Nbr	Item	Year	Opinion	Mar	Apr	May	Jun	Jul	Aug	Sep
		10461052	NASHVILLE-	2008	Act Hist	3,014	773	709	811	1,670	1,225	2,058
		10461052	NASHVILLE-	2009	Act Hist	2,926	996	803	925	514	0	0
		10461052	NASHVILLE-	2009	Stat Fcst	2,465	1,022	965	981	1,644	1,148	1,759
		10461052	NASHVILLE-	2009	Sales Plan	2,926	996	803	925	1,988	1,422	1,921
		1649492C2	HAND	2008	Act Hist	18,372	13,956	12,854	15,353	2,624	3,467	3,309
		1649492C2	HAND	2009	Act Hist	13,250	9,397	7,276	8,934	650	0	0
		1649492C2	HAND	2009	Stat Fcst	11,107	9,527	8,576	9,220	1,993	1,307	1,126
		1649492C2	HAND	2009	Sales Plan	13,250	9,397	7,276	8,934	2,514	1,991	1,643
		1664729C4	WELCOME-	2008	Act Hist	82,272	49,413	70,152	60,238	20,513	20,003	16,914
		1664729C4	WELCOME-	2009	Act Hist	31,855	18,476	21,040	18,883	1,758	0	0
		1664729C4	WELCOME-	2009	Stat Fcst	27,263	19,304	25,833	20,548	6,274	4,717	3,484
		1664729C4	WELCOME-	2009	Sales Plan	31,855	18,476	21,040	18,883	6,804	5,614	3,577
		1688312C1	SUPER ROCK	2008	Act Hist	6,856	7,639	7,883	7,349	1,834	1,599	2,266
		1688312C1	SUPER ROCK	2009	Act Hist	578	838	169	398	26	0	0
		1688312C1	SUPER ROCK	2009	Stat Fcst	588	954	214	425	332	336	339
		1688312C1	SUPER ROCK	2009	Sales Plan	578	838	169	398	299	347	337
		1807339C92	TRAVERSE	2008	Act Hist	407	982	1,461	679	148	360	262
		1807339C92	TRAVERSE	2009	Act Hist	397	560	132	54	6	0	0
		1807339C92	TRAVERSE	2009	Stat Fcst	404	638	168	58	49	46	48
		1807339C92	TRAVERSE	2009	Sales Plan	397	560	132	54	65	76	74

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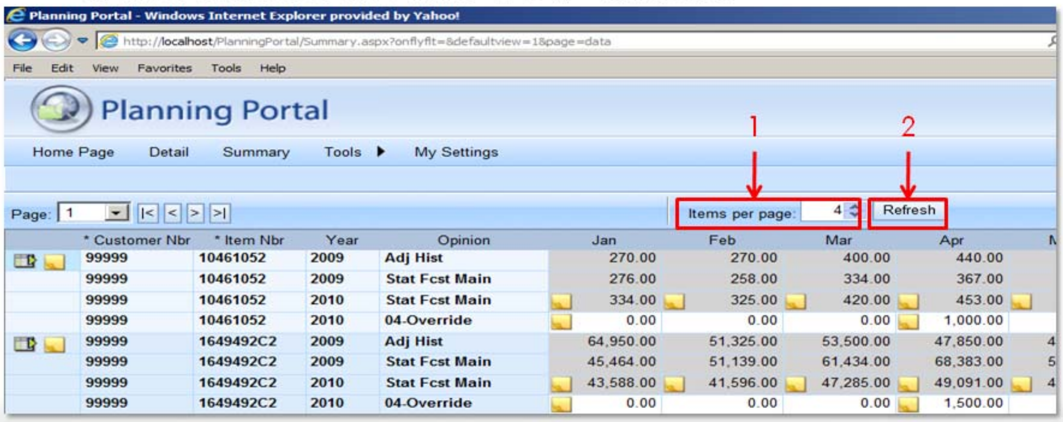
Summary View - Display

Summary View - Display

1. The Items per page drop-down to indicate the number of records to display on this View
2. Click the Refresh button after making changes to any of the settings to update the data based on the new criteria



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Summary View – Detail View

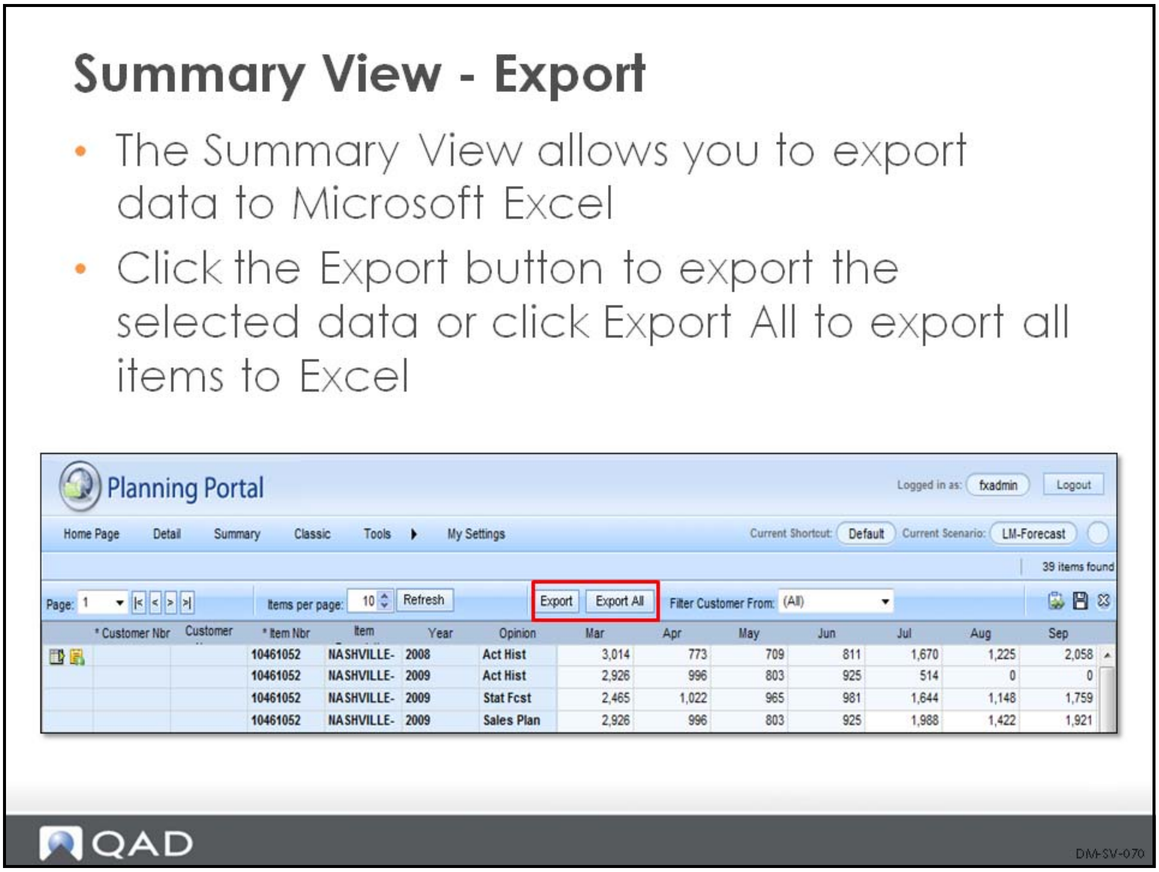
Summary View – Detail View

- Click the icon next a series to view it in the Detail View

- To return to Summary View, click the icon in the Data Selection heading. This icon will not display in the standard Detail View

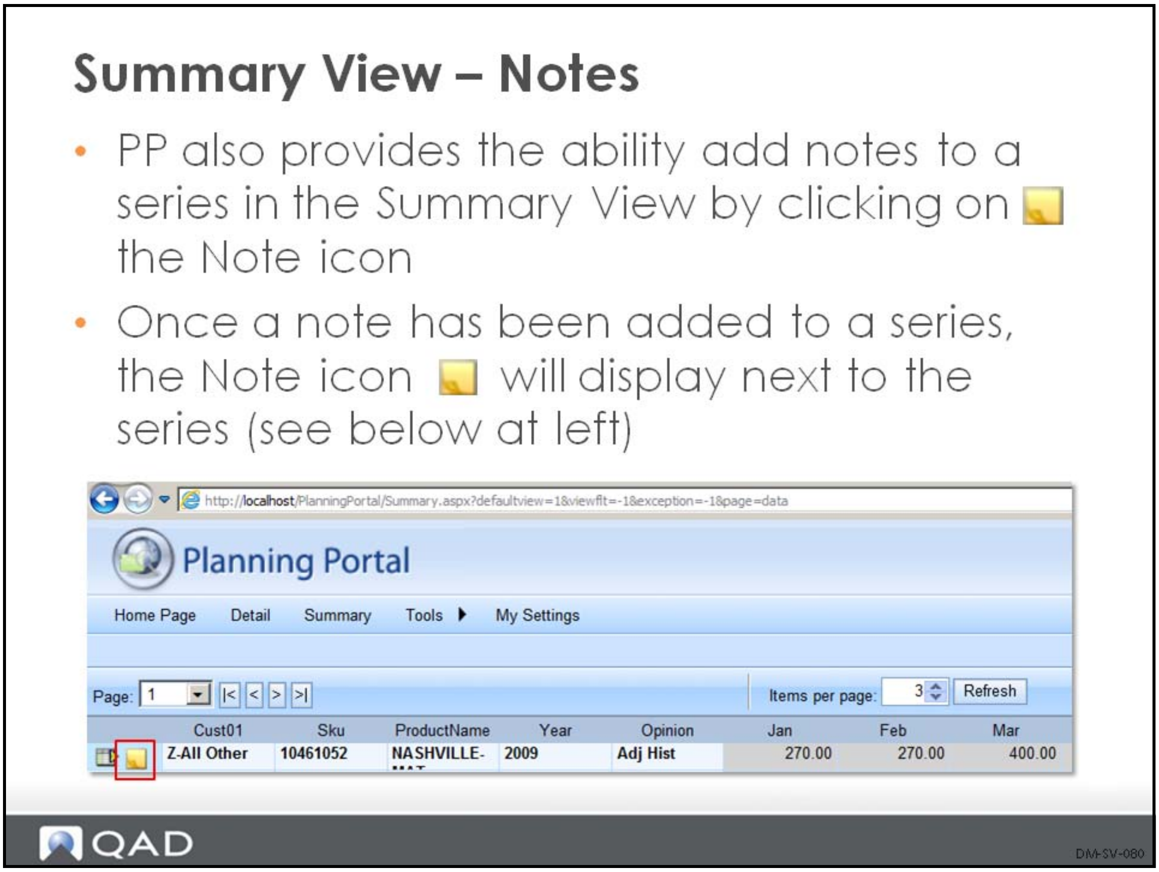
DM-SV-060

Summary View - Export



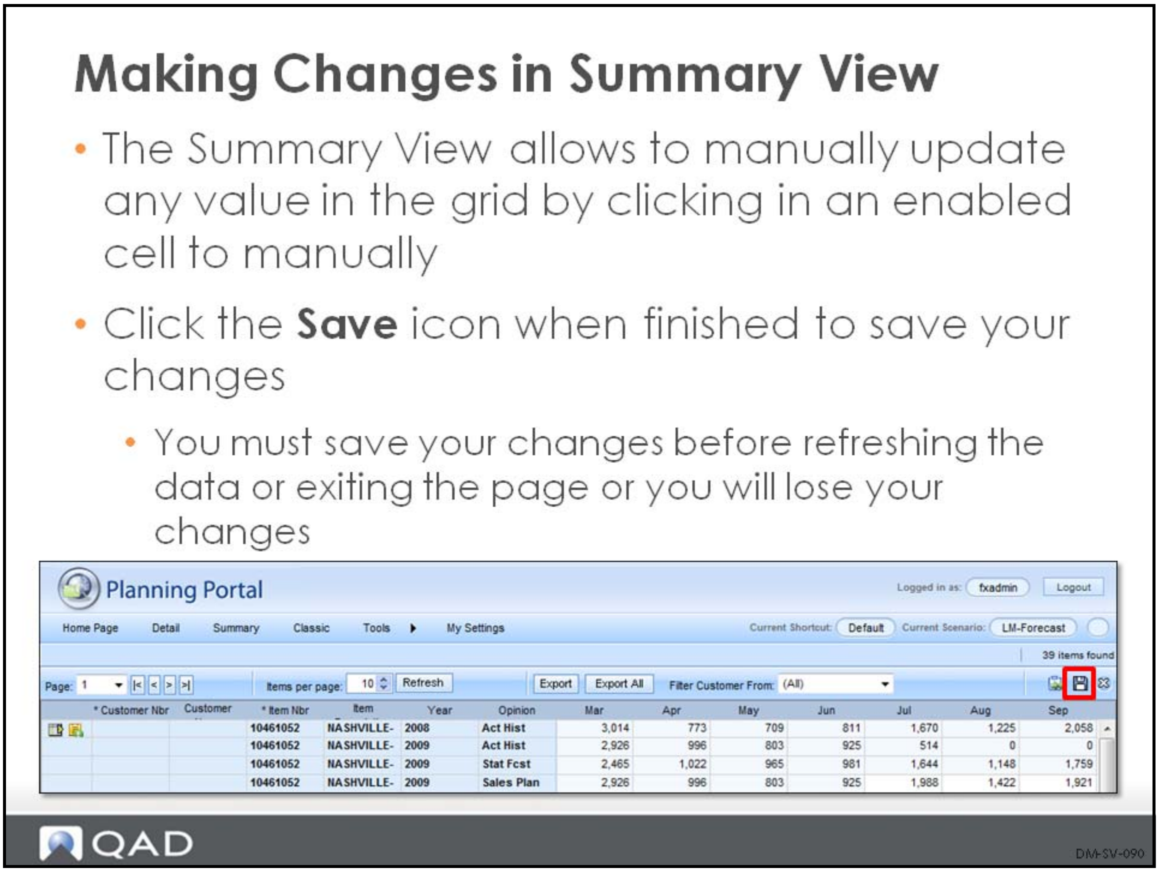
- After exporting, you can make edits or reformat the data if the cells in Excel are number formatted to “General”
- In a scenario with Daily Observations, the Excel file does not export all columns
  - This is an Excel limitation, as it only supports 256 columns

Summary View – Notes

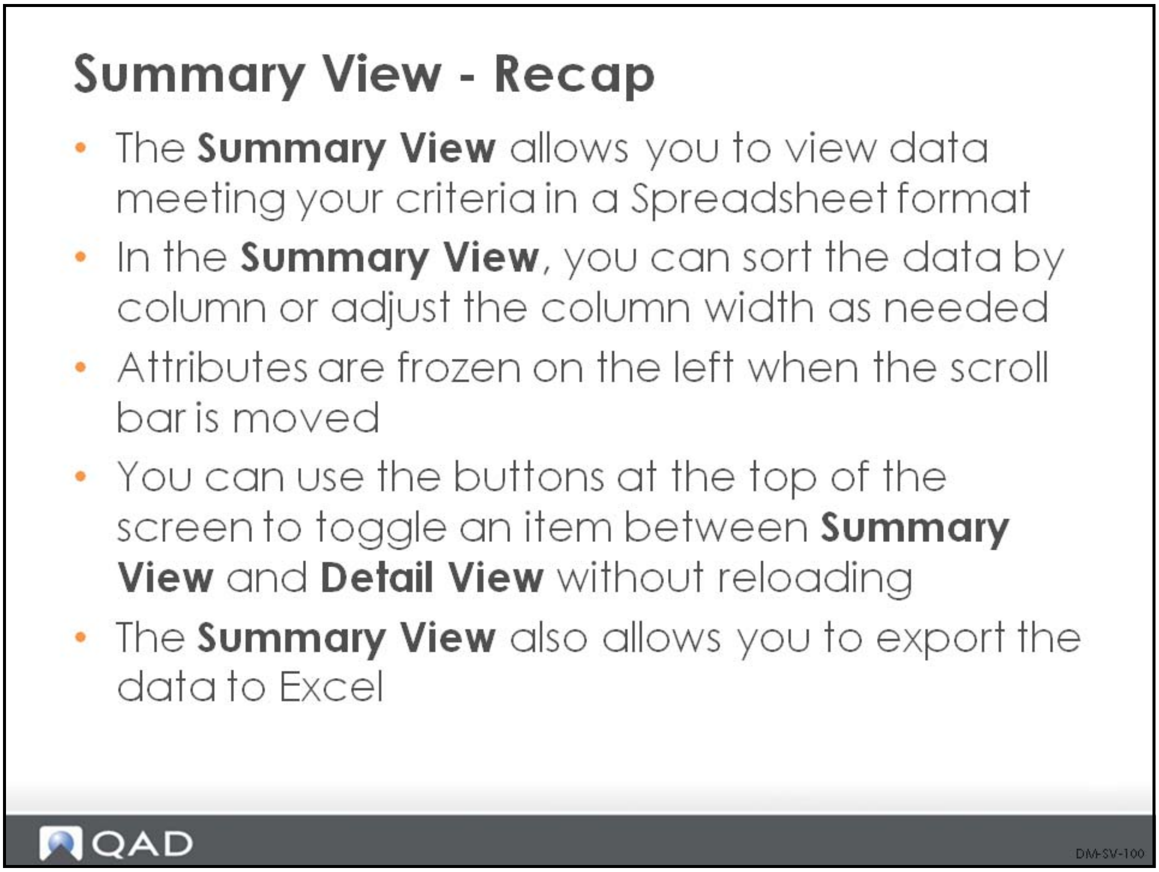


- Hover the cursor above the Note icon to display a tool tip with the last note added
- Click on the Note icon to view a detailed notes history for this series

Making Changes in Summary View



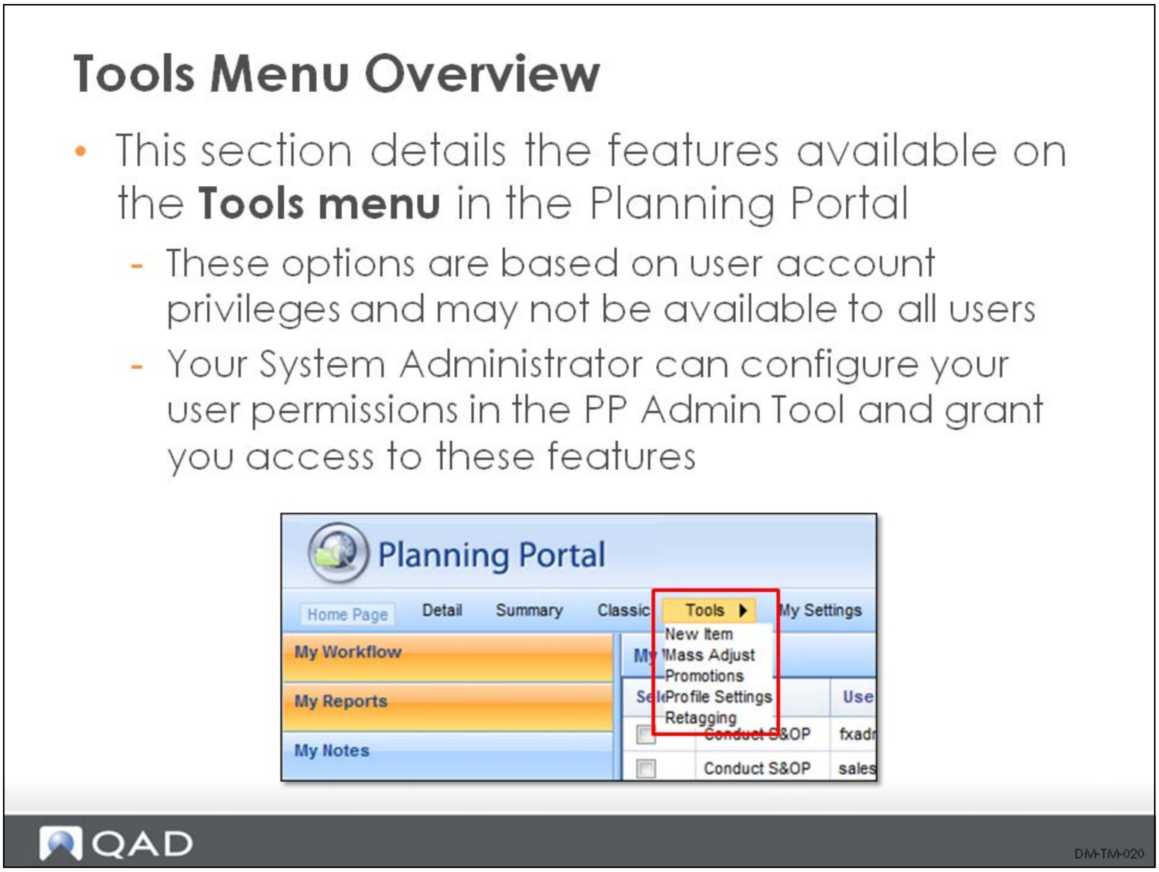
Summary View - Recap



Chapter 9

Tools Menu

Tools Menu Overview



The following options are included in the Tools menu and will be covered in this training module:

New Item

When a new series is forecasted, it can be added in the New Item tab by entering the SKU number and selecting the item's Attributes from a drop-down list.

Mass Adjust

Apply Forecast adjustments to multiple series.

Promotions

This feature has been discontinued.

Profile Settings

Apply a pattern to a series forecast to compensate for either predictable growth or a decrease in a product's demand.

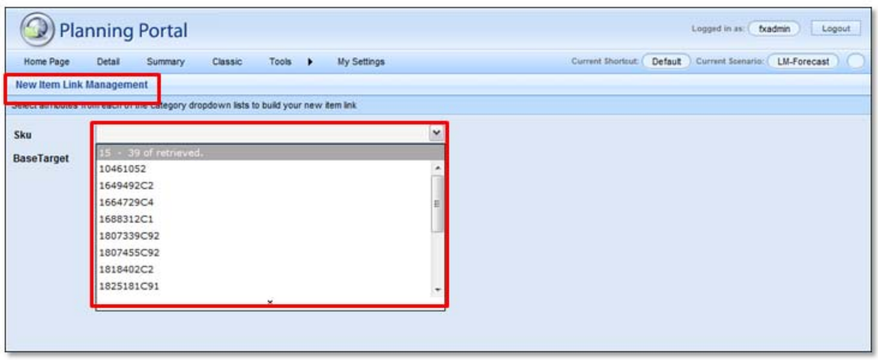
Retagging

Copy history, forecast, or any other Opinion Line from an old series to a new series.

New Item

New Item

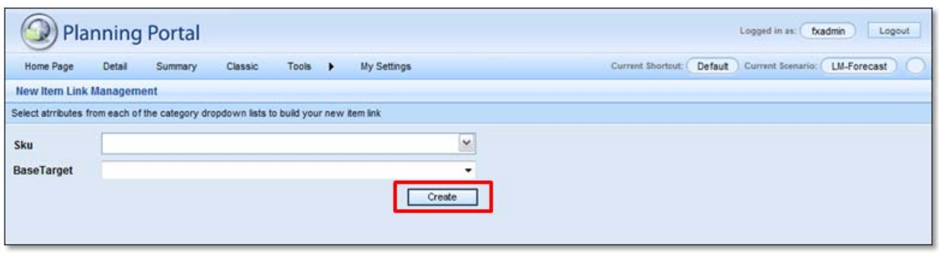
- The **New Item Link Management** screen enables you to create a new series in the Planning Portal
- Use the available drop-down lists to select the options for your new series



DM-TM-030

New Item

- Once your selections have been made, click the **Create** button
  - The "**New Item has been created successfully**" message displays when finished
- Planning Portal will display an error message if the series you are trying to create already exists



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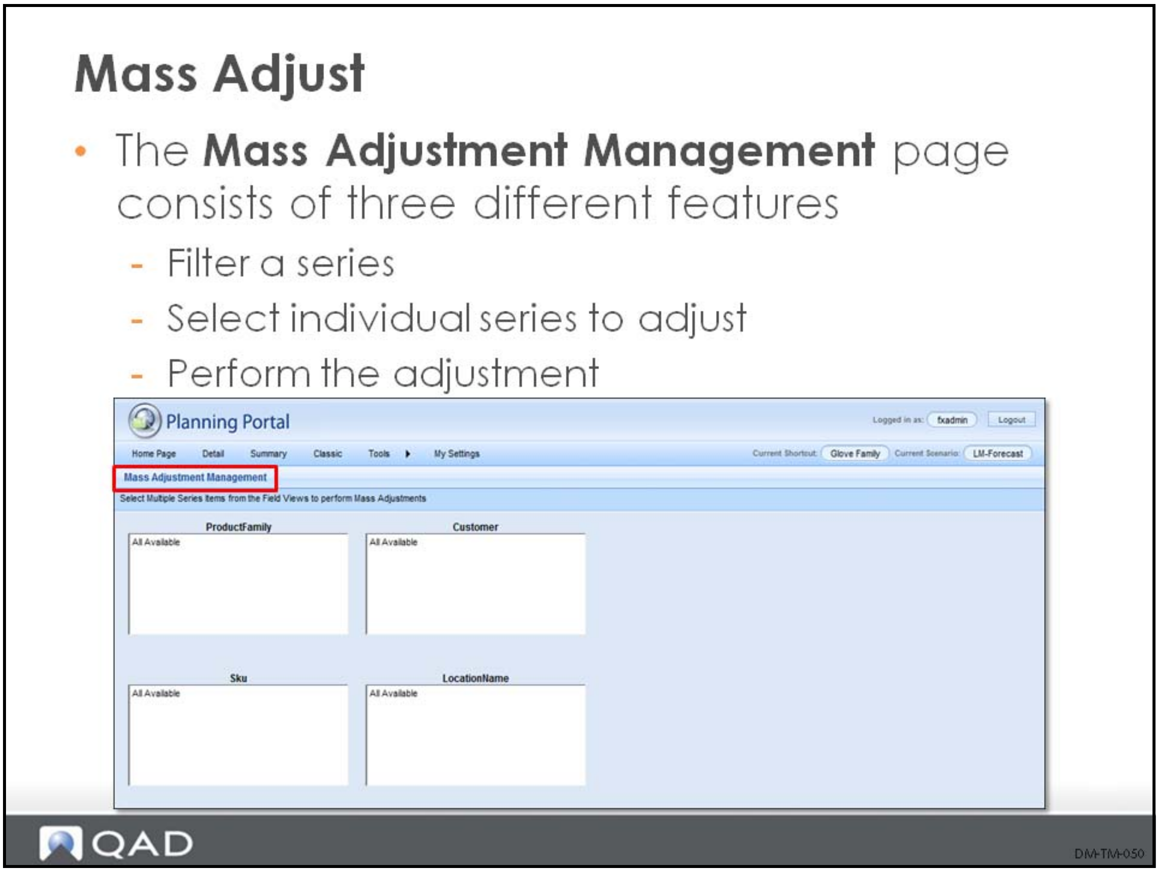
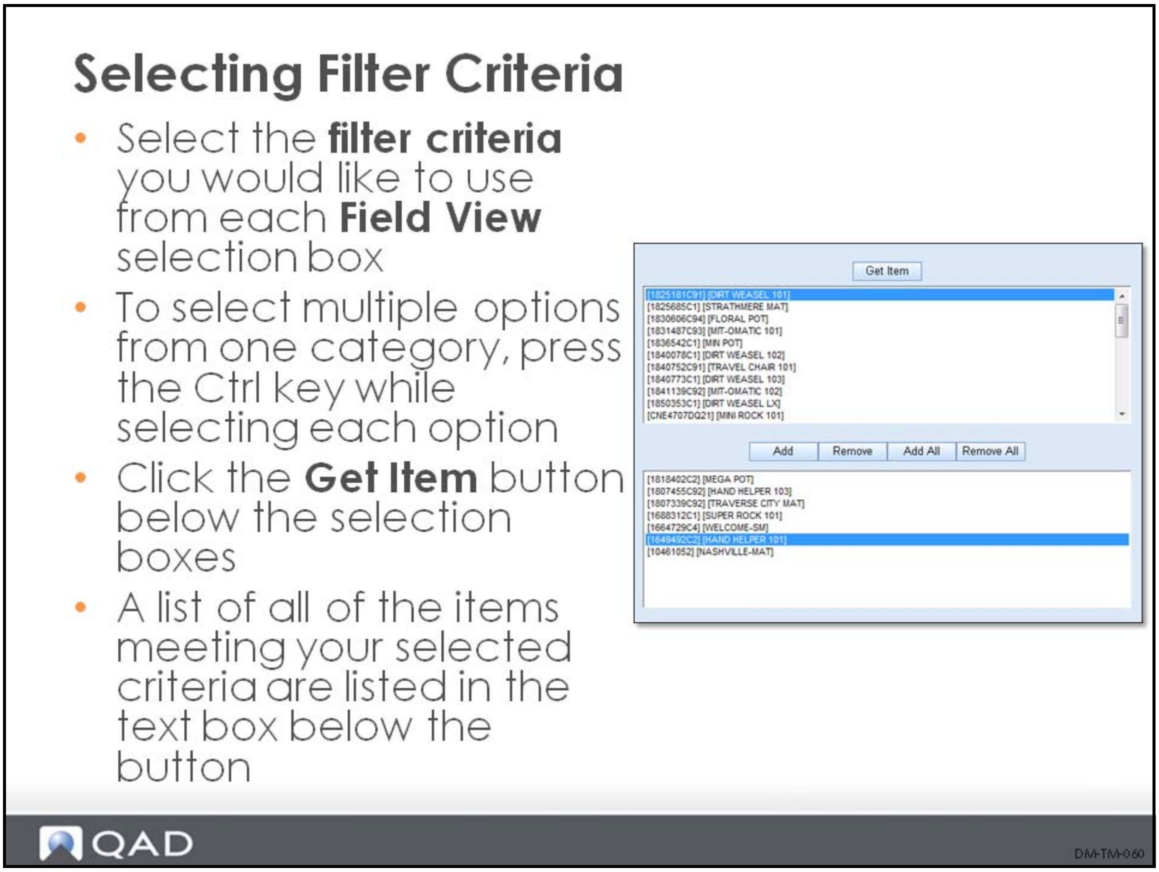
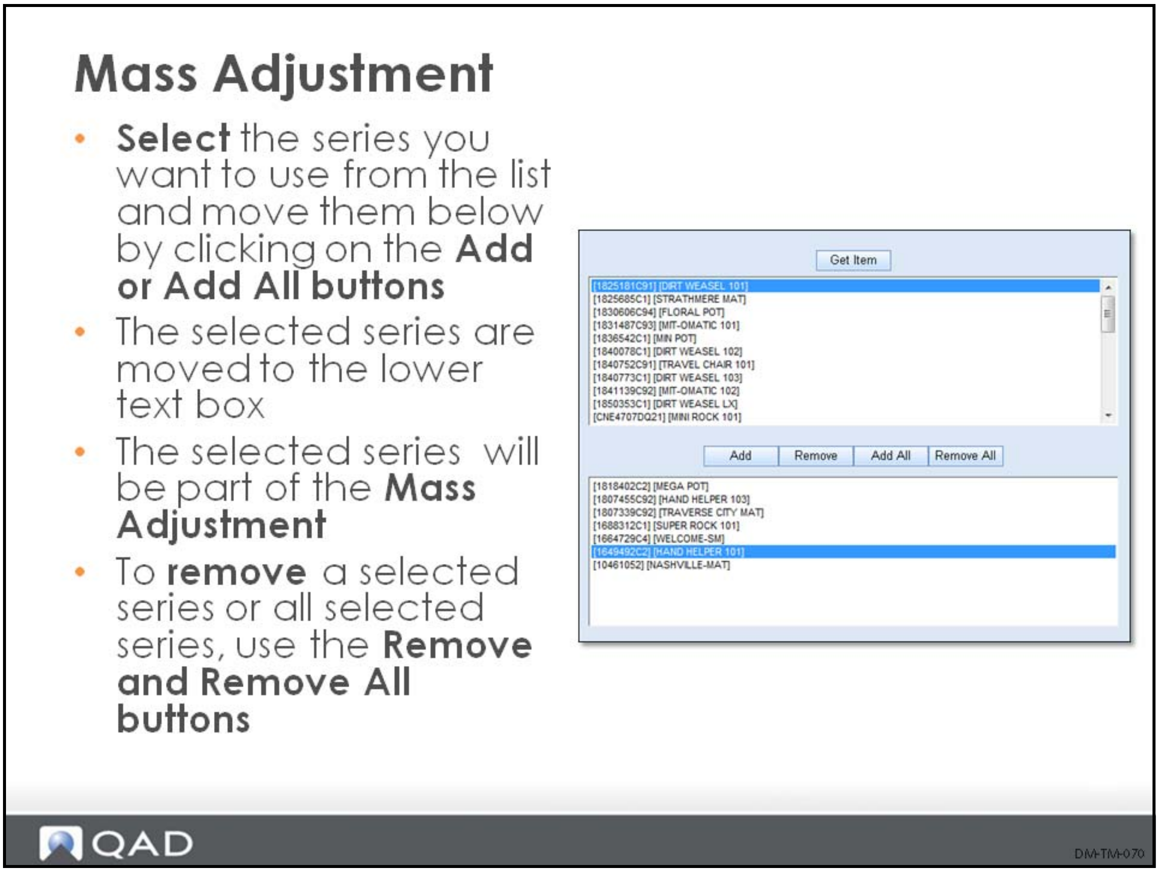
Mass Adjust


Mass Adjust
The Mass Adjustment Management page consists of three different features
Filter a series
Select individual series to adjust
Perform the adjustment
Planning Portal
Logged in as: fxadmin
Logout
Home Page
Detail
Summary
Classic
Tools
My Settings
Current Shortcut: Glove Family
Current Scenario: LM-Forecast
Mass Adjustment Management
Select Multiple Series Items from the Field Views to perform Mass Adjustments
ProductFamily
All Available
Customer
All Available
Sku
All Available
LocationName
All Available
QAD
DM-TM-050

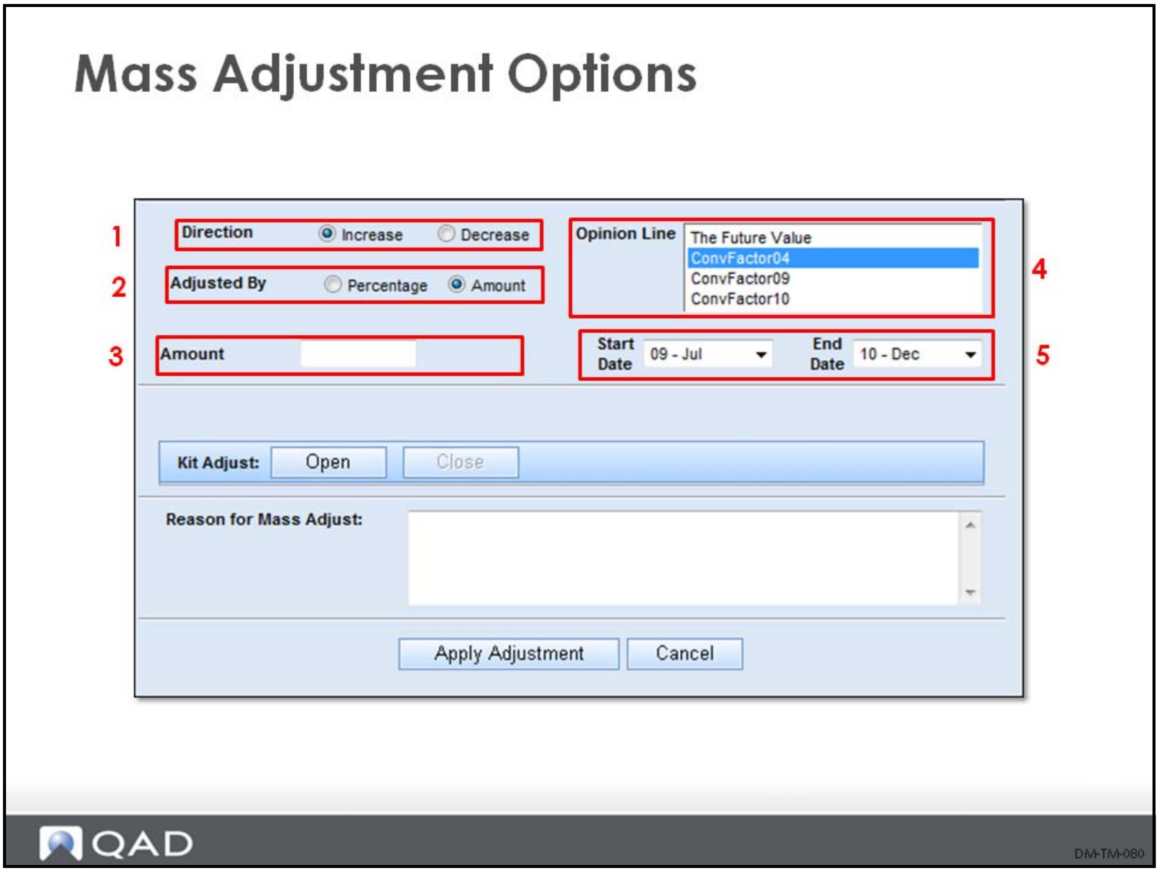
Selecting Filter Criteria



Mass Adjustment



Mass Adjustment Options



1 The Direction radio buttons indicate whether you want to Increase or Decrease the value of the opinion line.

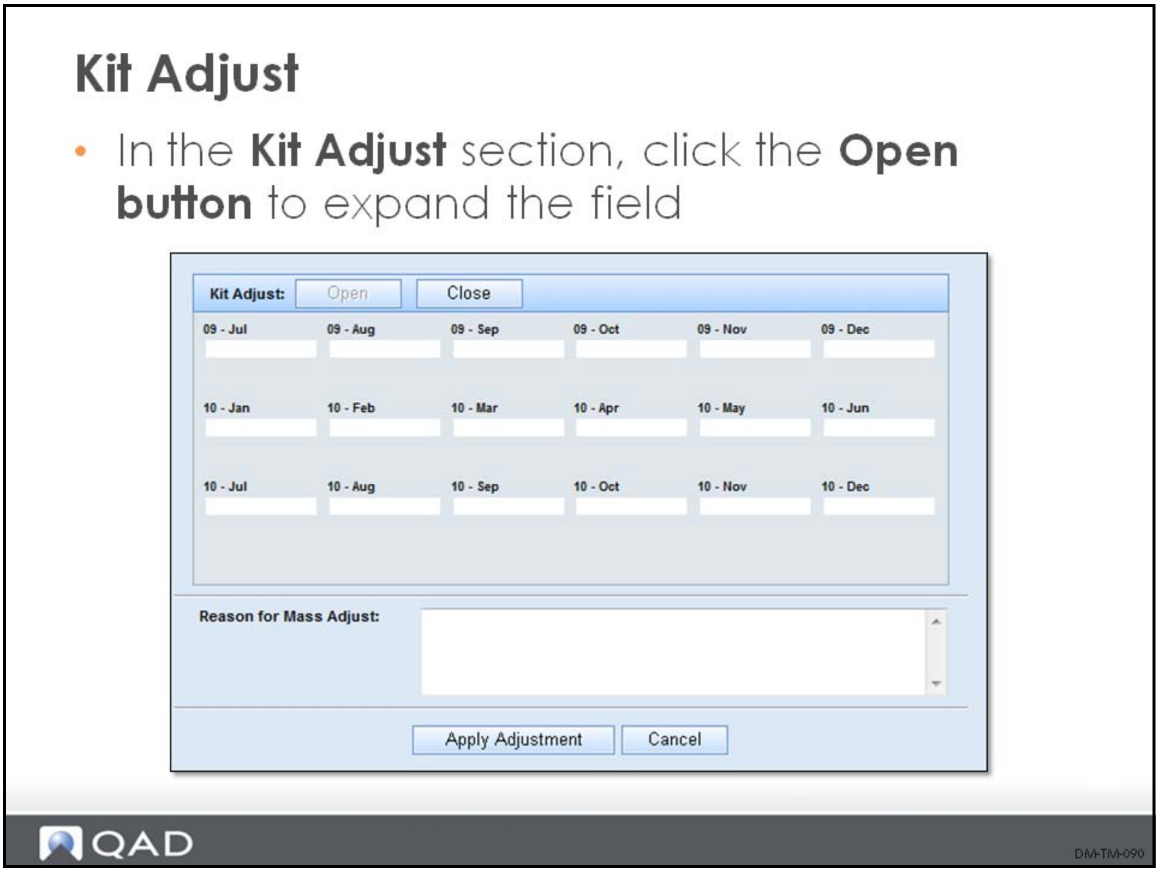
2 The Adjusted By field indicates whether you want to adjust by either a set Percentage or a specific Amount.

3 Enter the value for the amount or the percentage you are adjusting in the Amount field.

4 In the Opinion Line field, select the lines on which to perform the adjustment.

5 Use the Start Date and End Date fields to select the date range you would like to use in the adjustment.

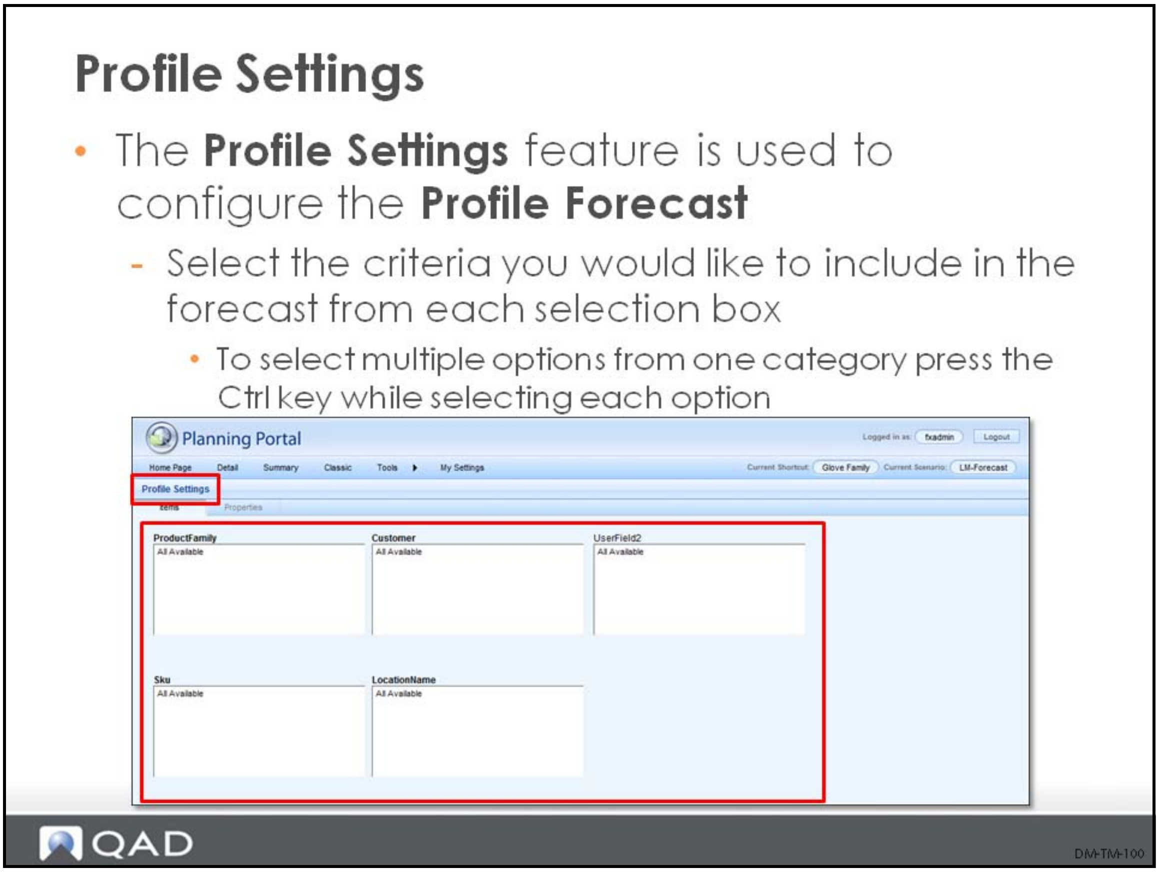
Kit Adjust



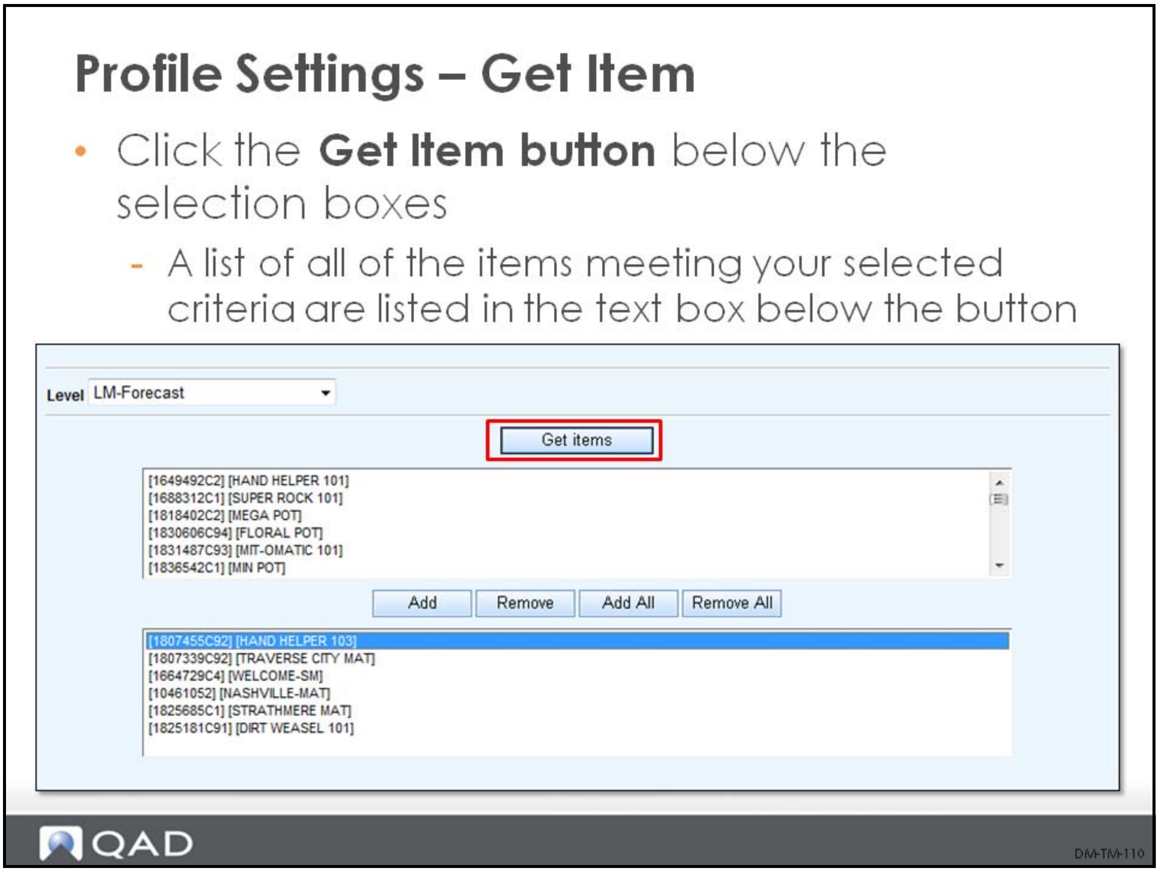
This feature enables you to set specific values for certain periods. There is one field for each period within the date range you specified in the Start Date and End Date fields.

- You must enter a value in each of these periods. If any fields are blank, you will get an error message
- In the Reason for Mass Adjust text box enter a description for the reason this Mass Adjustment is being performed
- Click the Apply Adjustment button when finished
  - The adjustment is applied to the selected series

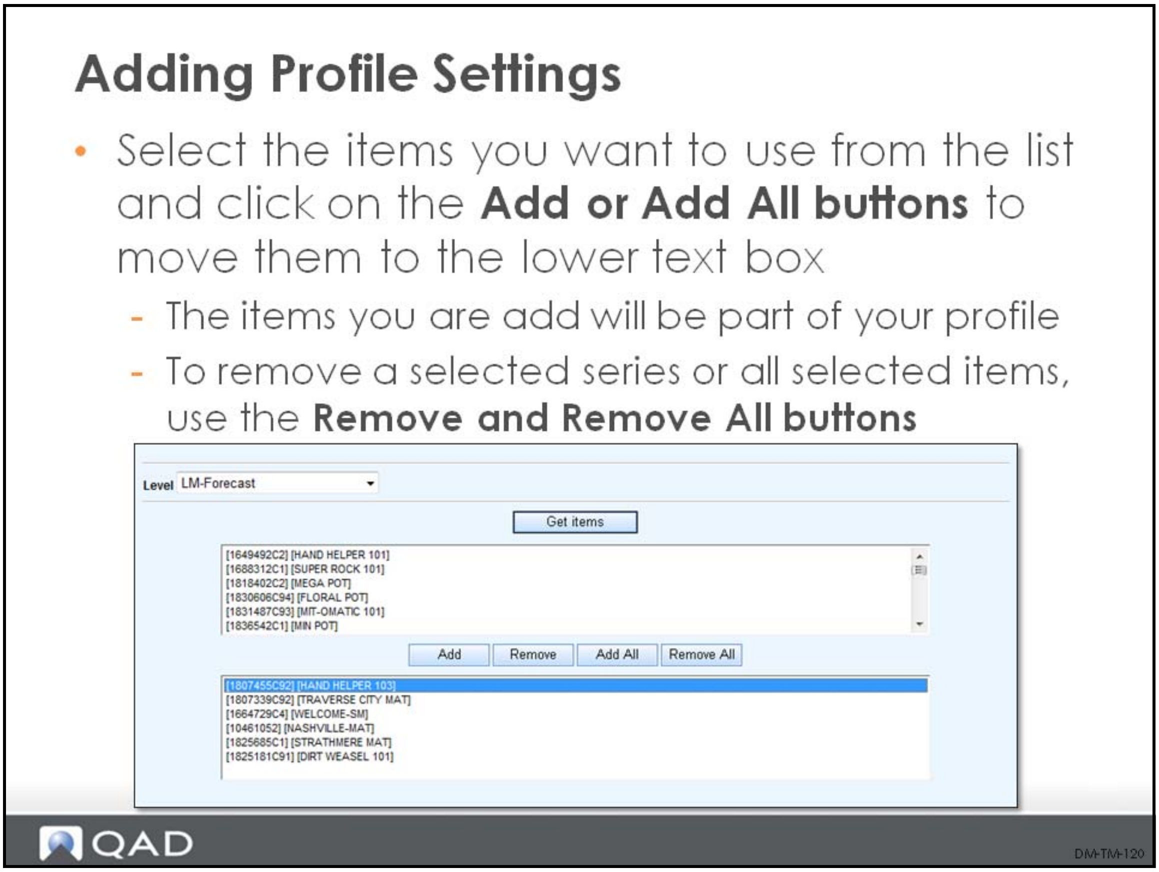
Profile Settings



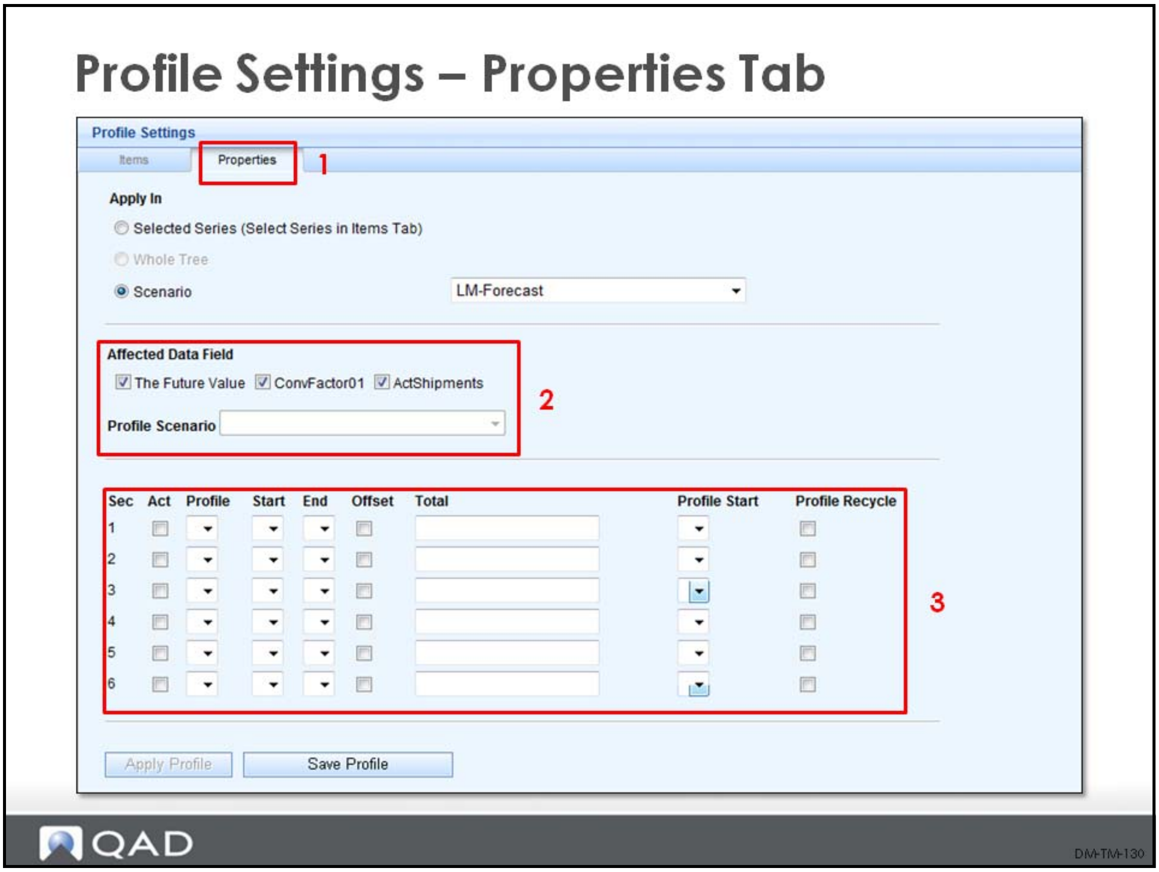
Profile Settings – Get Item



Adding Profile Settings



Profile Settings – Properties Tab



1 The Apply In field allows you to select where the profile is applied:

- Selected Series - Series you have selected from the Items tab
- Whole Tree - Scenario in addition to everything in the hierarchy
- Scenario - Entire Scenario. Use drop-down to the right to indicate which scenario

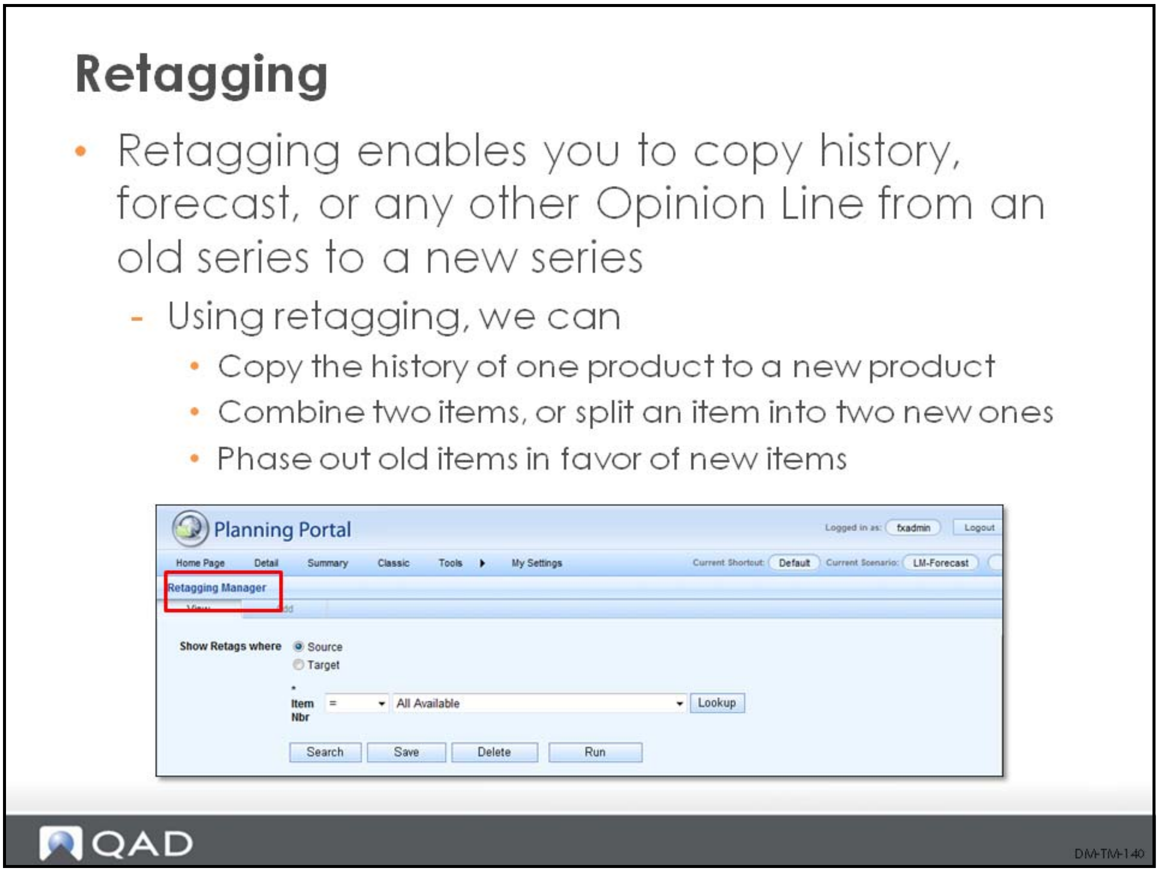
2 Use the check boxes in the Affected Data Field section to select from the available opinion lines.

- The opinion lines available here are configured by the System Administrator
- The Profile Scenario drop-down allows you to specify which scenario will contain the profile

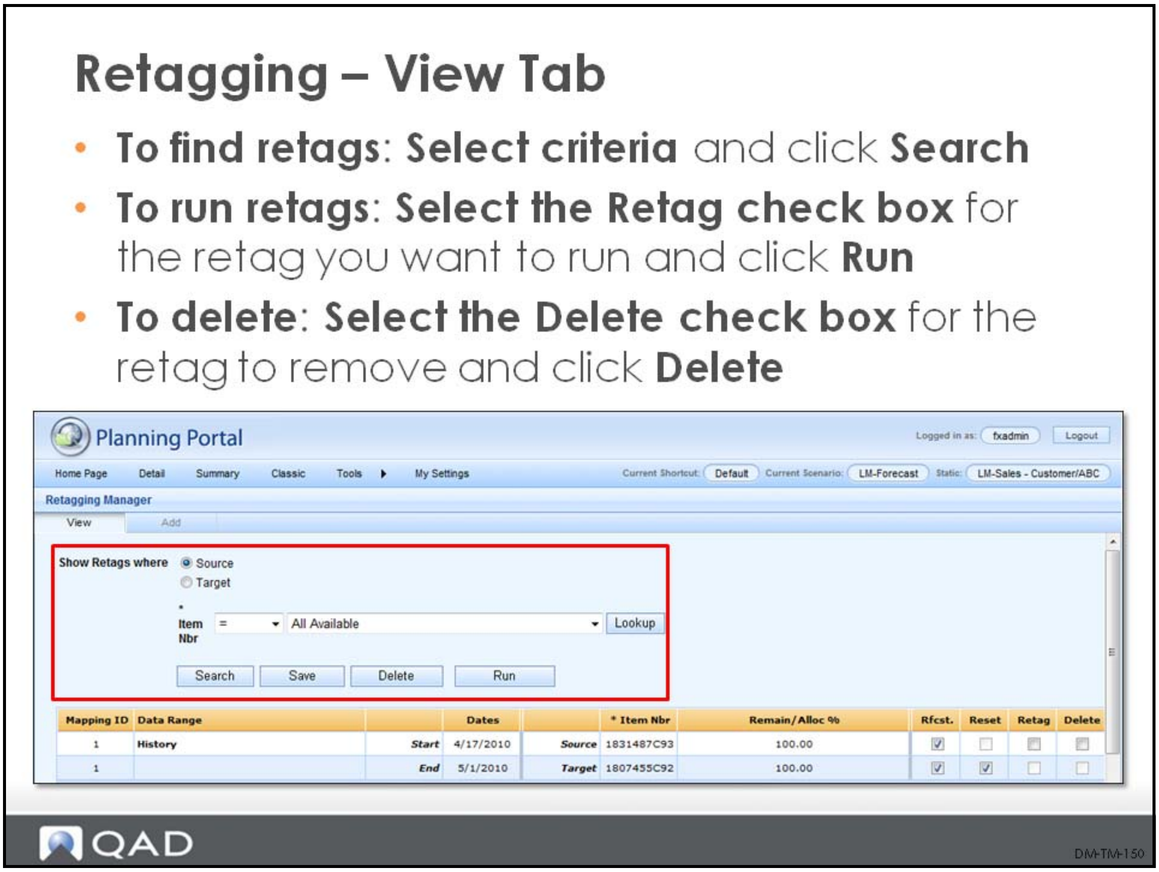
3 In the table at the bottom of the screen, select a Profile from the drop-down box for each row. There is one series listed for each series in your profile scenario.

- Specify the date range for this profile using the Start and End fields
- Check the Offset box if you want it to offset to the Profile Start
- Enter the value to apply across the selected range in the Total field
- The Profile Start date indicates the date this profile becomes active
- Check the Profile Recycle box if you want the profile to cycle over the date range
- Click the Apply Profile button to apply this profile to the selected items
- Click the Save Profile button to save these settings for future use

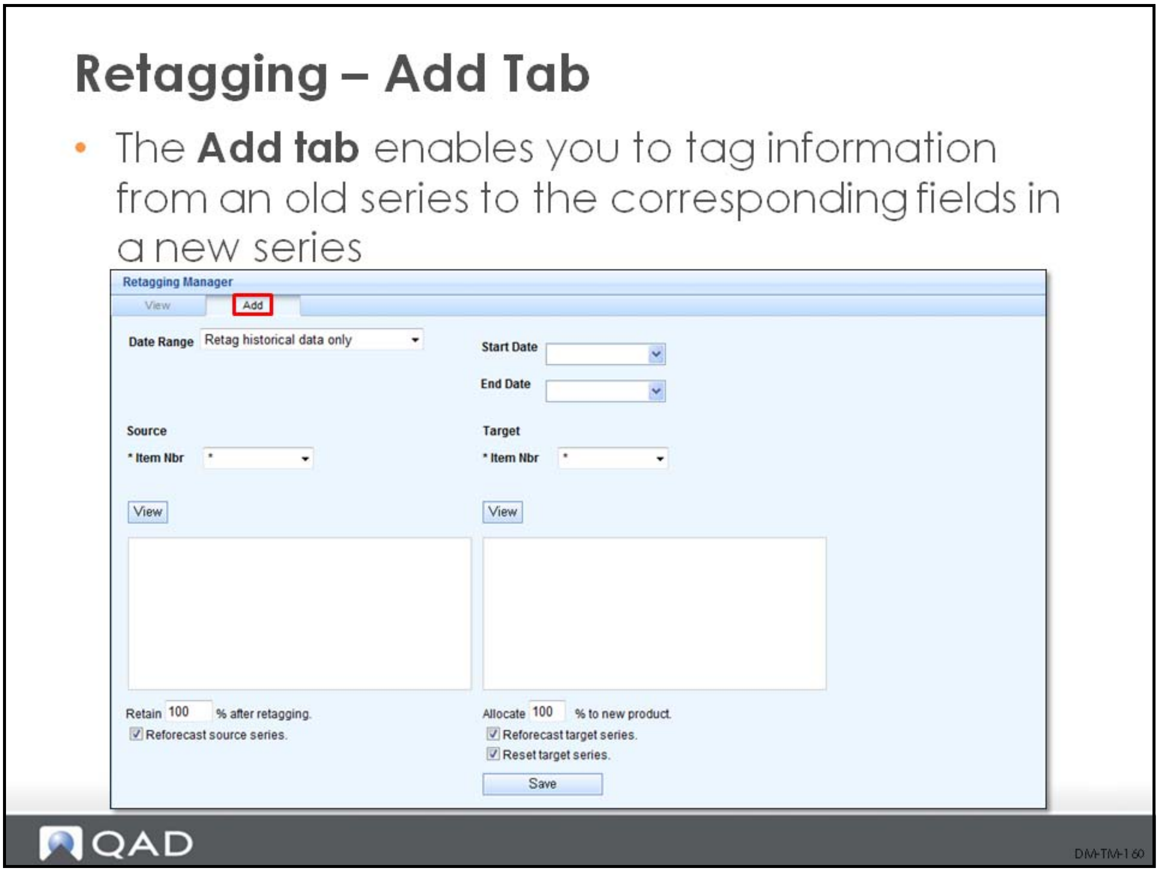
Retagging


Retagging
Retagging enables you to copy history, forecast, or any other Opinion Line from an old series to a new series
Using retagging, we can
Copy the history of one product to a new product
Combine two items, or split an item into two new ones
Phase out old items in favor of new items
Planning Portal
Logged in as: fxadmin
Logout
Home Page
Detail
Summary
Classic
Tools
My Settings
Current Shortcut: Default
Current Scenario: LM-Forecast
Retagging Manager
Show Retags where
Source
Target
Item Nbr
=
All Available
Lookup
Search
Save
Delete
Run
QAD
DM-TM-140

Retagging – View Tab



Retagging – Add Tab



Retagging – Add Tab

- Specify source and target fields
    - Use * to match multiple series
- Set date range, and whether to use history, forecast, or both
- Set the Retain% and Allocate%
    - Retain: Percentage of source series to retain after retagging
    - Allocate: Percentage of source series to add to target series
- Enable reforecast of source and target series, if desired
- Enable target reset, if desired
    - Set target to “0” before retagging
    - Click the Save button when finished