



QAD Enterprise Applications  
Enterprise Edition

# **Training Guide**

# **Demand Management 6.1 Planning**

# **Portal**

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# **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

### Planning Portal

- Provides the foundation for capturing input and taking the planning process to the next level: collaboration
- Gives sales forecasters the relevant supply chain information without overwhelming them with data
- Enables the team to interact with the forecast, demand plan, and manage inventory from remote sites via the internet



## Meet With Customers

### Meet With Customers

- The Planning Portal allows you to meet with customers, show them their sales history and their current forecast
- If a customer is planning a promotion, or other major changes in their purchasing plans, a salesperson can record the new information into the Planning Portal and it will immediately upload to the main system
- If you have a customer that prefers to enter their own forecast, you can give them access to the Planning Portal on their system
- All they will need is Internet Explorer

DM 6.1 Users

DM 6.1 Users				
	Typical User	Responsibility	Typical Access	Access to Data
Demand Planning	Demand Planner	Develop & Manage Demand Plan	Viewer	Living Master Scenario
	Eastern Region Manager	Manage & Approve Eastern Region Demand Plan	Viewer	Detailed Scenarios ABC, XYZ
Sales	Salesman #1	Develop Forecast for Customers A, B, C	Portal	
	Salesman #2	Develop Forecast for Customers X, Y, Z	Portal	
Marketing - PG's 1 & 2	Marketing Mgr. A	Manage & Approve Product Groups 1 & 2	Viewer	Detailed Scenarios PG's 1 & 2
	Product Mgr #1	Develop Forecast for Product Group 1	Viewer or Portal	
	Product Mgr #2	Develop Forecast for Product Group 2	Viewer or Portal	Detailed Scenarios PG 1 PG 2
	Marketing Mgr. B	Manage & Approve Product Groups 3 & 4	Viewer	Detailed Scenarios PG's 3 & 4
Product Mgr #3	Develop Forecast for Product Group 3	Viewer or Portal		
Marketing - PG's 3 & 4	Product Mgr #4	Develop Forecast for Product Group 4	Viewer or Portal	Detailed Scenarios PG 3 PG 4

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

### Planning Portal – Main Features

- **Configurable Home Page**
  - My Shortcuts / My View
  - My Reports
  - My Notes
  - My Charts
  - My Workflow
- **Data Browsing:** Detail and Summary views
- **Exceptions**
- **Tools:**
  - Field View & Data View
  - Custom Tasks
  - New Item Link
- **Mass Adjust**
- **Retagging**
- **Profile Forecast**

These features will be covered in later sections



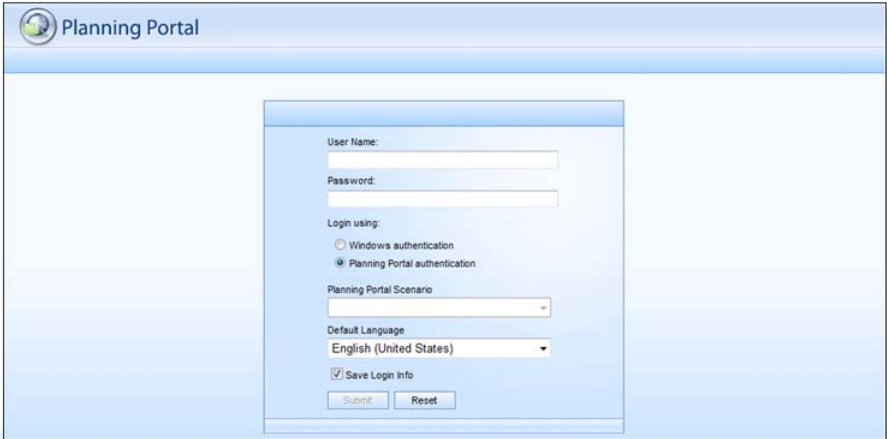
DM-PP-O-05

Logging in to Planning Portal

## Logging in to Planning Portal

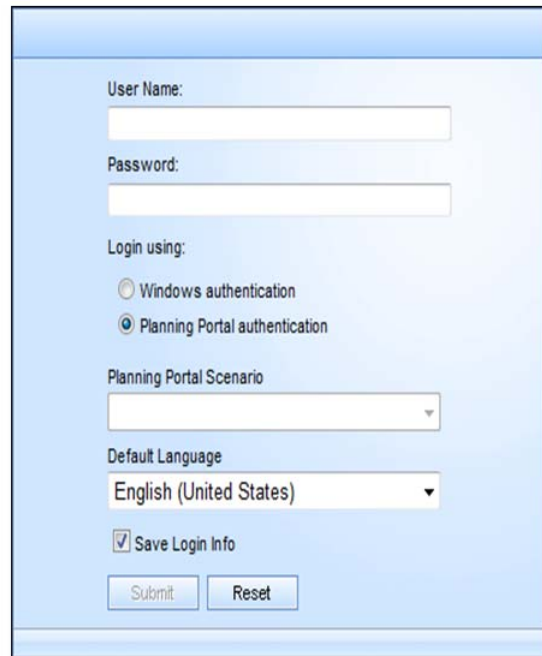
- To log into the Planning Portal you must use **Internet Explorer** to go to the following address:

<http://localhost/PlanningPortal/Viewer.aspx>



## 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



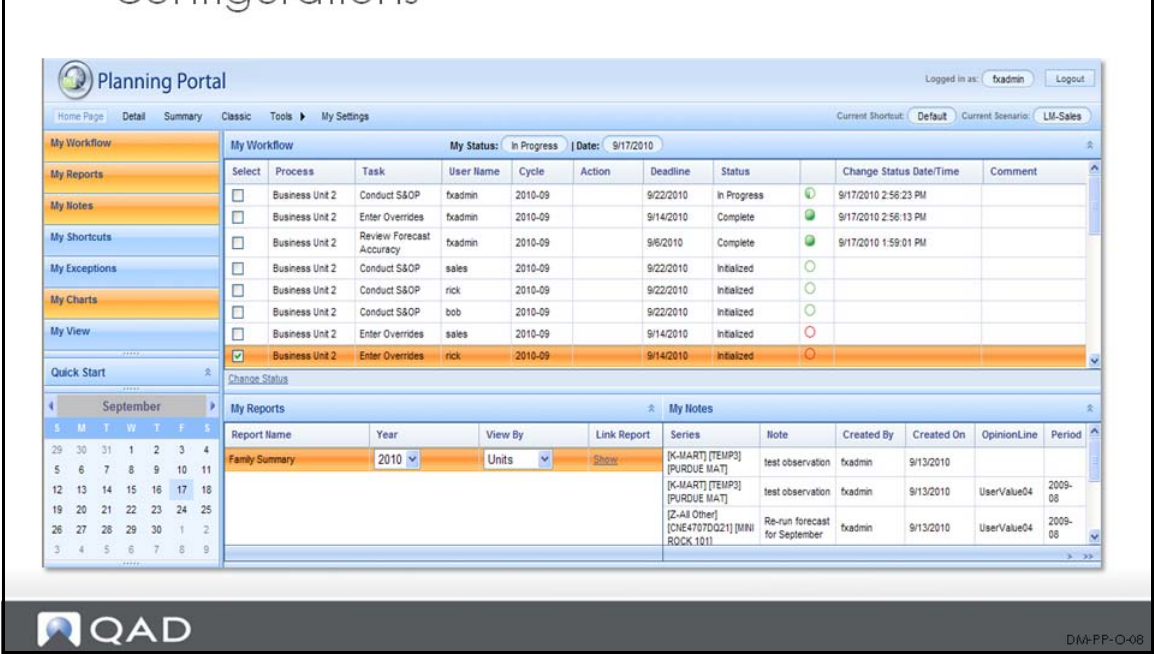
The screenshot shows a login form with the following fields and options:

- User Name:** A text input field.
- Password:** A text input field.
- Login using:** Two radio button options:  Windows authentication and  Planning Portal authentication.
- Planning Portal Scenario:** A dropdown menu.
- Default Language:** A dropdown menu with "English (United States)" selected.
- Save Login Info
- Submit** and **Reset** buttons.

Home Page

# Home Page

- The Home Page displays with your custom configurations



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

### Planning Portal - Recap

- Provides the foundation for capturing input and collaborating with customers
- Gives sales forecasters the relevant supply chain information without overwhelming them with data
- Enables the team to interact with the forecast, demand plan, and manage inventory from remote sites via the internet

Chapter 2

# Home Page

## Home Page - Overview

### Home Page – Overview

- The Home Page is always the first page displayed when you open the Planning Portal
- The Home Page is easily configurable to display the information most commonly used by each user
- Some Home Page options can be set by the User, some options will be determined by the Administrator

## Planning Portal – Home Page

# Planning Portal – Home Page

- When logging in to the Planning Portal, the Home Page will display by default

Planning Portal

Logged in as: fxadmin Logout

Home Page Detail Summary Classic Tools My Settings

Current Shortcut: Edge Family Current Scenario: LM-Forecast State: LM-Sales - Family / Group

My Workflow My Status: In Progress | Date: 8/10/2010

Select	Task	User Name	Cycle	Action	Deadline	Status	Change Status Date/Time	Comment
<input type="checkbox"/>	Enter Overrides	fxadmin	2010-08		8/11/2010	In Progress	8/10/2010 2:14:44 PM	
<input type="checkbox"/>	Review Forecast Accuracy	fxadmin	2010-08		8/6/2010	Complete	8/10/2010 2:13:19 PM	
<input type="checkbox"/>	Conduct S&OP	fxadmin	2010-10		10/19/2010	Initialized		
<input type="checkbox"/>	Conduct S&OP	sales	2010-10		10/19/2010	Initialized		
<input type="checkbox"/>	Conduct S&OP	rick	2010-10		10/19/2010	Initialized		
<input type="checkbox"/>	Conduct S&OP	bob	2010-10		10/19/2010	Initialized		
<input type="checkbox"/>	Enter Overrides	fxadmin	2010-10		10/12/2010	Initialized		
<input type="checkbox"/>	Enter Overrides	sales	2010-10		10/12/2010	Initialized		

Change Status

My Reports

Report Name	Year	View By	Link Report
Summary by Family	2010	Units	Show

August

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

QAD

DA-HP-030

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 Activation Bars

- The bars at the right allow you to select which panels are displayed on the **Home Page**
- Click any of the bars to display the corresponding panel on your Home Page. If the bar is selected, it will display in orange
- To remove a panel, click the bar again and it will display in blue again
- You can display as many panels as you would like and they are displayed on the Home Page in the same order as the bars



## Home Page - Customization

### Home Page - Customization









- Most of these panels are for display only, but Planning Portal does allow you to customize the information displayed in each panel
- Customization is done from the **My Settings** tab which is discussed in a later module
- The **Quick Start** bar does not display a panel on the Home Page, but will display quick reference links and access to the Planning Portal user guides when selected



## Home Page – My Workflow

### Home Page – My Workflow

- The My Workflow panel allows the status of the current tasks to be viewed for all users

My Workflow								
			My Status: In Progress		Date: 8/10/2010			
Select	Task	User Name	Cycle	Action	Deadline	Status	Change Status Date/Time	Comment
<input type="checkbox"/>	Enter Overrides	fxadmin	2010-08		8/11/2010	In Progress	 8/10/2010 2:14:44 PM	
<input type="checkbox"/>	Review Forecast Accuracy	fxadmin	2010-08		8/6/2010	Complete	 8/10/2010 2:13:19 PM	
<input type="checkbox"/>	Conduct S&OP	fxadmin	2010-10		10/19/2010	Initialized		
<input type="checkbox"/>	Conduct S&OP	sales	2010-10		10/19/2010	Initialized		
<input type="checkbox"/>	Conduct S&OP	rick	2010-10		10/19/2010	Initialized		
<input type="checkbox"/>	Conduct S&OP	bob	2010-10		10/19/2010	Initialized		
<input type="checkbox"/>	Enter Overrides	fxadmin	2010-10		10/12/2010	Initialized		
<input type="checkbox"/>	Enter Overrides	sales	2010-10		10/12/2010	Initialized		

[Change Status](#)



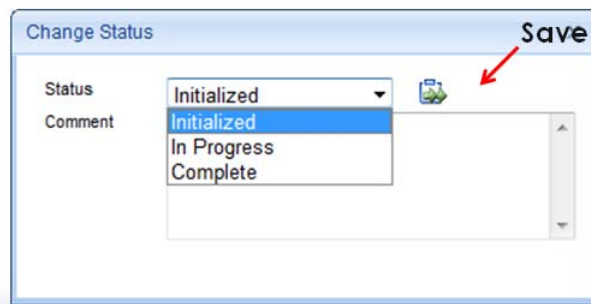
DVA-HP-060

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

## Home Page – My Workflow

- To change the status for the current forecast period, click one or more boxes under the "**Select**" column and click the "**Change Status**" link at the bottom of the panel
- The **Change Status window** displays, allowing you to select a new status for your forecast
- Click the "**Save**" icon to change the status



- 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

### Home Page – My Reports

- The **My Reports** panel displays parameter selection for two types of reports
  - Aggregate reports you created under **My Settings > My Reports**
  - Reports published by the DME Super User

Report Name	Year	View By	Link Report
Exceptions Report	2010 ▼	Units ▼	<a href="#">Show</a>
Family Report	2010 ▼	Units ▼	<a href="#">Show</a>
Forecast Variance Report	2010 ▼	Units ▼	<a href="#">Show</a>

- 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 Notes

- The **My Notes** panel displays all notes assigned to the current user
- Users can set the criteria for which notes are displayed in this panel in the **My Settings** section







Serie	Note	Created By	Created On	OpinionLine	Period
[K-MART] [ZJCMKD786A] [A-4 MAT]	Target is adding a lot more	sales	10/12/2009		
[K-MART] [CR35058] [PURDUE MAT]	Target is adding a lot more	sales	10/12/2009		
[K-MART] [CR47692] [BLOOMINGTON MAT]	Target is adding a lot more	sales	10/12/2009		
[K-MART] [FCADBRALIDANIF]					

- If all the available Notes cannot be viewed in the panel, click the linked arrows in the bottom right corner of the panel to view the next page

## Home Page – My Shortcuts

### Home Page – My Shortcuts

- The **My Shortcuts** panel displays saved groups of settings that can be used for specific data scenarios that you may view frequently
- A shortcut allows you to select criteria such as scenario, field view, and date range, and then save this combination of settings

My Shortcuts 				
Name	Load	Type	Last View	Delete
Default	<a href="#">Go</a>	Detail	8/6/2010	
Edge Family	<a href="#">Go</a>	Detail	8/6/2010	
Glove Family	<a href="#">Go</a>	Detail	8/6/2010	

- 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

### Home Page – My Exceptions

- The **My Exceptions** panel displays a list of exceptions available to the current user
- Exceptions enable users to select items based on the numerical information stored in **Observations**

Exceptions Name	Refresh Exception
12 Month Fcst	<a href="#">Refresh</a>
12 Month Hist	<a href="#">Refresh</a>
Fcst vs. Actual	<a href="#">Refresh</a>
Market > 35%	<a href="#">Refresh</a>
No Sales 6 months	<a href="#">Refresh</a>



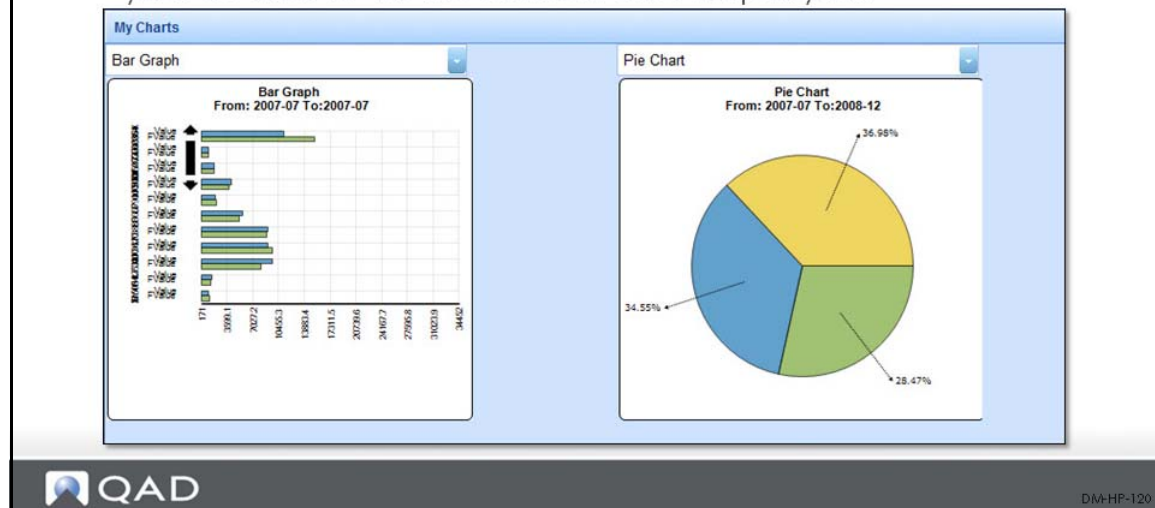
DA-HP-110

- 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

### Home Page – My Charts

- 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



- 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

- **My Shortcut Editor** displays options that allow you to configure settings that define how data is displayed on screen
- The **My View** panel can be accessed from the **Home Page, Detail View, Summary View, and Classic View** screens
- The criteria in **My Shortcut Editor** can be populated in the My Settings section
- Some options in the **My Shortcut Editor** panel are assigned by your Administrator

The screenshot shows the 'My Shortcut Editor' dialog box with the following settings:

Property	Value
Shortcut	S&OP Summary
Type	Summary
Filter	(None)
Exception	(None)
Mode	On Fly
Hierarchy	LM-Sales - Customer/ABC
Show Hierarchy	<input checked="" type="checkbox"/>
Level	LM-Sales-2 (Customer Na
Conversion	Units
Field View	Aggregate View
Cmd Bar Show	<input type="checkbox"/>
Data View	Sales View
Sort By	* Customer Nbr
Order	Asc Desc (Desc selected)
Calendar Jump	0
Start Date	Jan
End Date	Dec

## 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

Property	Value
Shortcut	S&OP Summary
Type	Summary
Filter	(None)
Exception	(None)
Mode	On Fly
Hierarchy	LM-Sales - Customer/ABC
Show Hierarchy	<input checked="" type="checkbox"/>
Level	LM-Sales-2 (Customer Na)
Conversion	Units
Field View	Aggregate View
Cmd Bar Show	<input type="checkbox"/>
Data View	Sales View
Sort By	* Customer Nbr
Order	<input type="radio"/> Asc <input checked="" type="radio"/> Desc
Calendar Jump	0
Start Date	Jan
End Date	Dec

## 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

The screenshot shows the 'My Shortcut Editor' dialog box with the following settings:

- 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

## 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

The screenshot shows the 'My Shortcut Editor' dialog box with the following settings:

Field	Value
Shortcut	S&OP Summary
Type	Summary
Filter	(None)
Exception	(None)
Mode	On Fly
Hierarchy	LM-Sales - Customer/ABC
Show Hierarchy	<input checked="" type="checkbox"/>
Level	LM-Sales-2 (Customer Na
Conversion	Units
Field View	Aggregate View
Cmd Bar Show	<input type="checkbox"/>
Data View	Sales View
Sort By	* Customer Nbr
Order	Asc Desc
Calendar Jump	0
Start Date	Jan
End Date	Dec

## 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

Field	Value
Shortcut	S&OP Summary
Type	Summary
Filter	(None)
Exception	(None)
Mode	On Fly
Hierarchy	LM-Sales - Customer/ABC
Show Hierarchy	<input checked="" type="checkbox"/>
Level	LM-Sales-2 (Customer Na
Conversion	Units
Field View	Aggregate View
Cmd Bar Show	<input type="checkbox"/>
Data View	Sales View
Sort By	* Customer Nbr
Order	<input type="radio"/> Asc <input checked="" type="radio"/> Desc
Calendar Jump	0
Start Date	Jan
End Date	Dec

## 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

The screenshot shows the 'My Shortcut Editor' dialog box with the following settings:

Property	Value
Shortcut	S&OP Summary
Type	Summary
Filter	(None)
Exception	(None)
Mode	On Fly
Hierarchy	LM-Sales - Customer/ABC
Show Hierarchy	<input checked="" type="checkbox"/>
Level	LM-Sales-2 (Customer Na
Conversion	Units
Field View	Aggregate View
Cmd Bar Show	<input type="checkbox"/>
Data View	Sales View
Sort By	* Customer Nbr
Order	Asc Desc
Calendar Jump	0
Start Date	Jan
End Date	Dec

## Home Page – My Shortcut Editor

- **Data View** - Enables you to select the Data View from the options available. This controls the attributes that show on the view
- **Order** - Enables you to sort your data in ascending or descending order based on the selected data field
- Select a field from the drop-down and use the radio buttons to change the sort order

The screenshot shows the 'My Shortcut Editor' dialog box with the following settings:

- 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

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

## Home Page – My Shortcut Editor

- **Calendar Jump** - Enables you to set everything to a month offset
  - Use the negative values to indicate historical data
- **Start Date** - The first period to include in the view
- **End Date** - The final period to include in the view
- Click the **Save** button to save any changes made to the current shortcut
- Click the **Save As** button to save the current settings as a new shortcut

Property	Value
Shortcut	S&OP Summary
Type	Summary
Filter	(None)
Exception	(None)
Mode	On Fly
Hierarchy	LM-Sales - Customer/ABC
Show Hierarchy	<input checked="" type="checkbox"/>
Level	LM-Sales-2 (Customer Na
Conversion	Units
Field View	Aggregate View
Cmd Bar Show	<input type="checkbox"/>
Data View	Sales View
Sort By	* Customer Nbr
Order	<input type="radio"/> Asc <input checked="" type="radio"/> Desc
Calendar Jump	0
Start Date	Jan
End Date	Dec



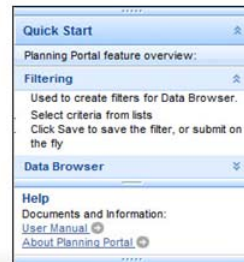
DM-HP-200

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

## Home Page – Quick Start

### Home Page – Quick Start

- The **Quick Start** button at the bottom of the list is used to access the PP Quick Start Guide
- Clicking this bar does not add a panel to the home page, but instead will expand to display a list of links to different PP features
- This list includes brief overviews of different functionality within PP, as well as links to online versions of the PP User Guides



## Home Page – Recap

### Home Page – Recap

- The Home Page is always the first page displayed when you open the Planning Portal
- The Home Page is easily configurable
- Some Home Page options can be set by the User, some options will be determined by the Administrator

Chapter 3

# **My Settings**

## My Settings - Overview

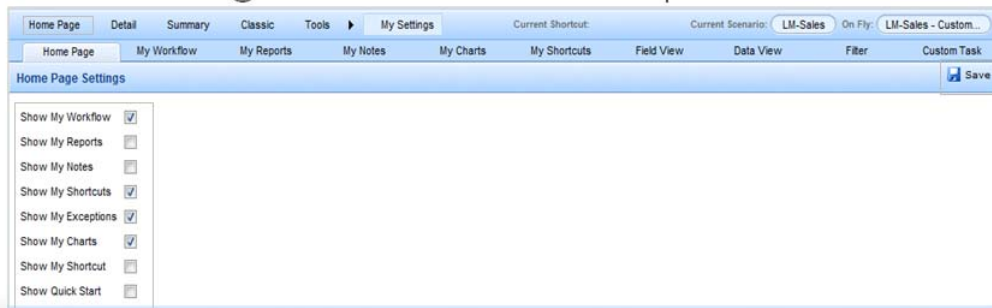
### My Settings - Overview

- 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

## 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



## My Workflow Tab

### My Workflow Tab

- The **My Workflow** tab is used to show which columns will show up in the Workflow on the Home Page.
- **Workflow** allows the user to update status and see important tasks that they need to accomplish.

The screenshot shows the 'My Workflow' tab selected in the navigation menu. Below the menu is the 'Workflow Settings' section, which includes the following options:

- Workflow Show User:**  My Tasks,  All Tasks
- Workflow Show Cycle:**  Current,  All
- Workflow List Field:**
  - Process
  - Task
  - User Name
  - Cycle
  - Action
  - Deadline
  - Status
  - Status Change Date
  - Comment



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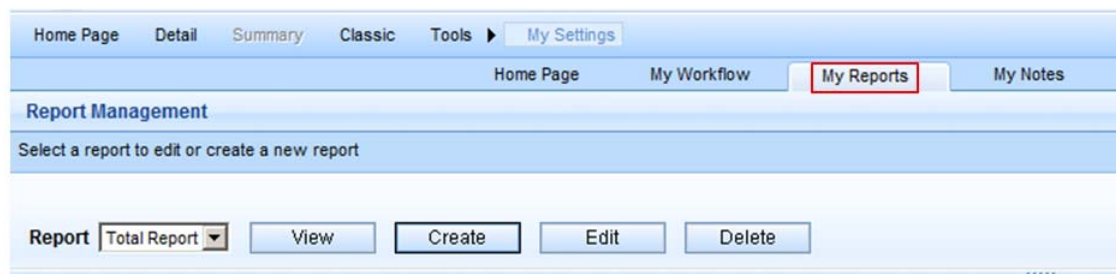
My Tasks vs. All – use this to display all tasks or only your tasks.

- 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

### My Reports Tab

- The **My Reports** tab is where users can create reports
  - Reports are to allow users to see their data in different units of measure and/or different levels of details

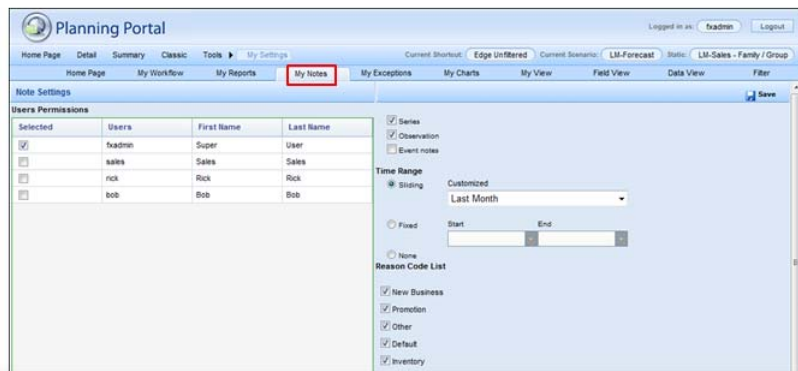


- View – Run the report and view the results
- Create – Define a new report
- Edit – Edit an existing report
- Delete – Delete a report

## My Notes Tab

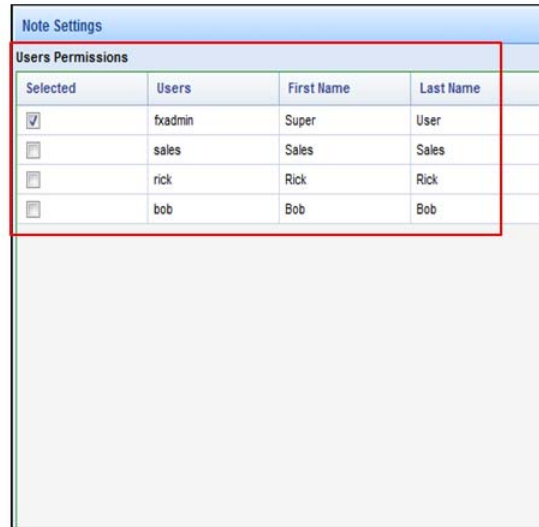
### My Notes Tab

- 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



## 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



Note Settings			
Users Permissions			
Selected	Users	First Name	Last Name
<input checked="" type="checkbox"/>	fxadmin	Super	User
<input type="checkbox"/>	sales	Sales	Sales
<input type="checkbox"/>	rick	Rick	Rick
<input type="checkbox"/>	bob	Bob	Bob

## 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

The screenshot shows the 'My Notes Tab' configuration interface. It features a 'Save' button in the top right corner. Below it, there are three checked checkboxes: 'Series', 'Observation', and 'Event notes'. The 'Time Range' section has a radio button for 'Sliding' selected, with a 'Customized' dropdown menu set to 'Last Month'. There are also radio buttons for 'Fixed' and 'None'. The 'Reason Code List' section has five checked checkboxes: 'New Business', 'Promotion', 'Other', 'Default', and 'Inventory'.

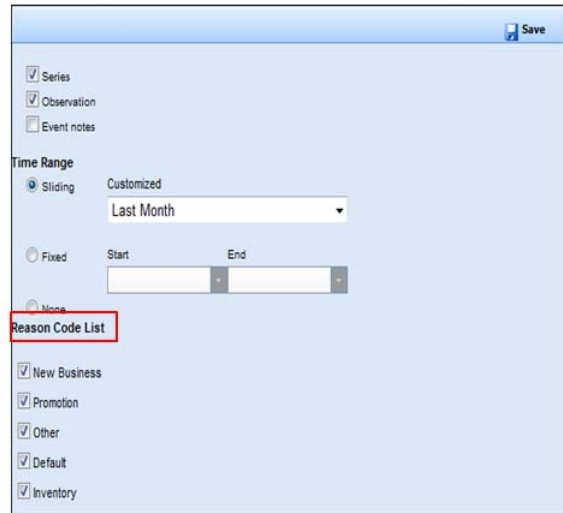
## My Notes Tab

- 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

The screenshot shows the 'My Notes Tab' settings interface. At the top right is a 'Save' button. Below it are three checked checkboxes: 'Series', 'Observation', and 'Event notes'. The 'Time Range' section is highlighted with a red box and contains three radio button options: 'Sliding' (selected), 'Fixed', and 'None'. Under 'Sliding', there is a 'Customized' label and a dropdown menu showing 'Last Month'. Below the dropdown are 'Start' and 'End' labels with corresponding input fields. The 'Reason Code List' section below has five checked checkboxes: 'New Business', 'Promotion', 'Other', 'Default', and 'Inventory'.

## 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



The screenshot shows a configuration window for the 'My Notes Tab'. At the top right is a 'Save' button. Below it are three checked checkboxes: 'Series', 'Observation', and 'Event notes'. The 'Time Range' section has a radio button for 'Sliding' (selected) and a dropdown menu set to 'Customized' with 'Last Month' selected. Below this are 'Fixed' and 'None' radio buttons, and a date range selector with 'Start' and 'End' fields. A red box highlights the 'Reason Code List' label. At the bottom are five checked checkboxes: 'New Business', 'Promotion', 'Other', 'Default', and 'Inventory'.

## My Charts Tab

### My Charts Tab

- The My Charts tab is used to configure the different types of graphical representations of the data you can display on the Home Page

The screenshot shows the 'My Charts' configuration page in the Planning Portal. The interface includes a 'Chart List' on the left and 'Chart Settings' on the right. The 'Chart Settings' section is currently configured for a 'Column' chart. The 'Opinion Lines' table lists several data series: 'The Future Value', 'Value', 'ConvFactor04', 'ConvFactor01', and 'UserValue06'. The 'Date Range' is set to 'Fixed' for '2007-07', and the 'Group By' is set to 'Series Attribute' with 'Sku' as the attribute. The 'Default Views' are set to '(None)'. The 'My Charts' tab in the top navigation bar is highlighted with a red box.



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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)

Chart Settings

Name

Description

Type **Column**

Opinion Lines	Selected	Opinion Line
<input type="checkbox"/>		The Future Value
<input type="checkbox"/>		Value
<input type="checkbox"/>		ConvFactor04
<input type="checkbox"/>		ConvFactor01
<input type="checkbox"/>		UserValue06

Date Range

Start End

Fixed 2007-07 2007-07

Sliding Historical Forecast

Group By  Series Attribute  Period  None

Series Attribute Sku

Default Views (None)

# 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

Selected	Opinion Line
<input type="checkbox"/>	The Future Value
<input type="checkbox"/>	Value
<input type="checkbox"/>	ConvFactor04
<input type="checkbox"/>	ConvFactor01
<input type="checkbox"/>	UserValue06

Date Range: Start: 2007-07, End: 2007-07

Group By:  Series Attribute,  Period,  None

Series Attribute: Skus

Default Views: (None)

## 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

Selected	Opinion Line
<input type="checkbox"/>	The Future Value
<input type="checkbox"/>	Value
<input type="checkbox"/>	ConvFactor04
<input type="checkbox"/>	ConvFactor01
<input type="checkbox"/>	UserValue06

## My Shortcuts Tab

### My Shortcuts Tab

- The **My Shortcuts** panel is used manage shortcuts
- This is the **only place** to **delete** a shortcut
- Other than the delete option, this view is the same as the My Shortcut Editor on the Home Page

The screenshot displays the 'My Shortcuts' tab in a software application. The interface is divided into two main sections: a list of shortcuts and a configuration panel for the selected shortcut.

**My Shortcuts List:**

Shortcut Name	Delete Shortcut
Default	
Sales Detail	
S&OP Detail	
Marketing Detail	
Current shortcut	
A Rank Summary View	
Product Summary	
S&OP Summary	

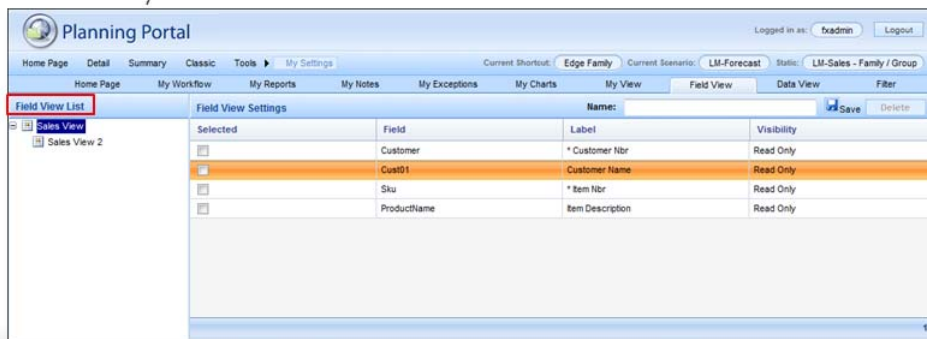
**My Shortcut Editor Configuration:**

- Shortcut: Current shortcut
- Type: Detail
- Filter: (None)
- Exception: (None)
- Mode: On Fly
- Hierarchy: LM-Sales - Customer/ABC
- Show Hierarchy:
- Level: LM-Sales-2 (Customer Na
- Conversion: Units
- Field View: ---Customer
- Cmd Bar Show:
- Data View: Sales View
- Sort By: Customer Name
- Order:  Asc  Desc
- Calendar Jump: 0
- Start Date: Jan
- End Date: Dec

## Field View Tab

### Field View Tab

- The **Field View** tab displays the settings for any current views to which you have access
- You can also use this tab to create your own custom **Field Views**
- These custom views will display in the **Field View drop-down** of the **My View** panel and can be used to filter your data



DM-MS-1.60

- 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

### Create a Field View

1. Select an existing view from the **Field View List** panel at the left
2. The **Field View Settings** panel to the right displays the list of available fields to use

The screenshot shows the 'Planning Portal' interface. At the top, there are navigation tabs: Home Page, Detail, Summary, Classic, Tools, and My Settings. Below these are sub-tabs: Home Page, My Notes, My View, Field View, Data View, Chat, and Exception. The 'Field View' tab is active. On the left, the 'Field View List' panel shows a tree view with 'Sales View' selected. In the center, the 'Field View Settings' panel displays a table of available fields. On the right, there is a 'Name:' text input field and a 'Save' button. Red arrows and boxes highlight these elements: 1 points to 'Sales View', 2 points to the 'Field View List' header, 3 points to the 'Selected' column checkboxes, 4 points to the 'Name:' field, and 5 points to the 'Save' button.

Selected	Field	Label	Visibility
<input type="checkbox"/>	Customer	* Customer Nbr	Read Only
<input type="checkbox"/>	Cust01	Customer Name	Read Only
<input type="checkbox"/>	Sku	* Item Nbr	Read Only
<input type="checkbox"/>	ProductName	Item Description	Read Only

- 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

### Data View Tab

- The **Data View** tab displays the settings for any current views to which you have access
- You can also use this tab to create your own custom **Data Views**
- These custom views will display in the **Data View drop-down** of the **My View panel** and can be used to filter your data

Selected	Field	Label	Year	Visibility	Display Graph	Display Summary
<input type="checkbox"/>	ActShipments	Act Hist	2008	Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	ActShipments	Act Hist	2009	Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	FValue	Stat Fcat	2009	Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Poisson	Sales Plan	2009	Editable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	UserValue09	POS Hist	2008	Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	UserValue09	POS Hist	2009	Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



DAM-MS-180

- 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

### Create a Data View

1. Select an existing view from the **DataView List** panel at the left
2. The **DataView Settings** panel to the right displays the list of available fields to use

The screenshot shows the 'Data View Settings' panel with the following table:

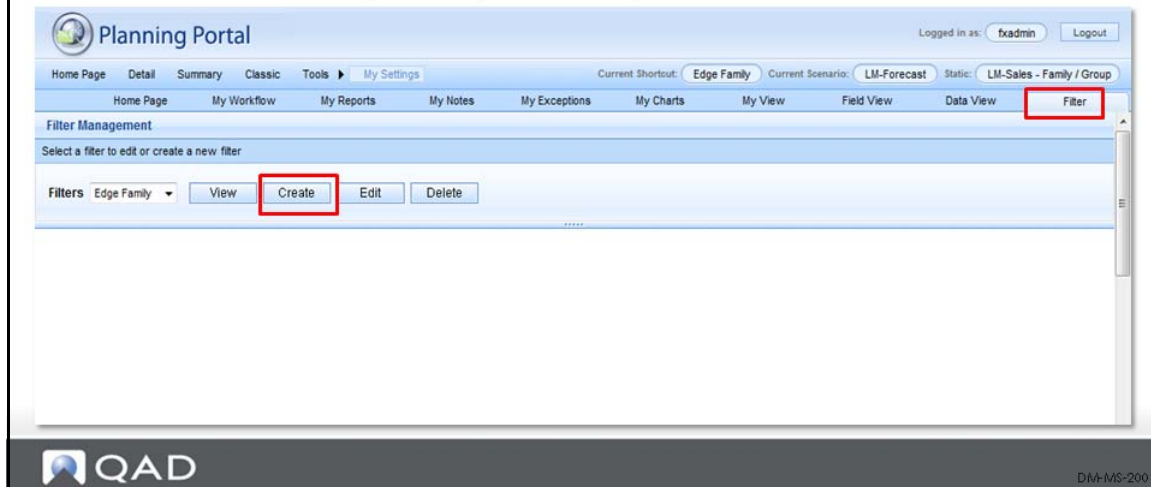
Selected	Field	Label	Year	Visibility	Display Graph	Display Summary
<input type="checkbox"/>	ActShipments	Act Hist	2008	Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	ActShipments	Act Hist	2009	Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	FValue	Stat Fcst	2009	Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Poisson	Sales Plan	2009	Editable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	UserValue09	POS Hist	2008	Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	UserValue09	POS Hist	2009	Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- 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 Summary 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

### Filter Tab

- The **Filter tab** allows you access to view, create, edit or delete filters that can be applied to your data
- Once created, these filters can be selected in the **My Views** section, allowing you to apply these filters without having to repeatedly enter the criteria



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

The screenshot shows a web form for configuring a filter. At the top, there is a text input field for 'Filter Name' containing 'My New Filter'. Below it is a 'Description' field with a drop-down arrow. The 'Definition' section contains a list of fields, each with a drop-down arrow: 'ProductFamily', 'Customer', 'Sku', 'LocationName', 'ProductBrand', 'LocationRegion', 'ProductClass', 'UserField7', and 'UserField2'. At the bottom of the form are two buttons: 'Save' and 'Submit', both of which are highlighted with a red rectangular border.

## 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

Chapter 4

# **My Workflow**

## My Workflow – Overview

### My Workflow – Overview

- The **My Workflow** panel shows a list of tasks with deadlines by user
- The configuration in PP Admin controls what each user will see
- Users can update status for one or more tasks at a time
- Tasks can displayed so that only the individual assigned the task can view it, or so that everyone in the group can see it

## My Workflow – Home Page

### My Workflow – Home Page

- The **My Workflow** panel shows a list of tasks with deadlines by user

Select	Process	Task	User Name	Cycle	Action	Deadline	Status
<input type="checkbox"/>	S&OP	Update Marketing Plan	fxadmin	2011-03		3/3/2011	Initialized
<input type="checkbox"/>	S&OP	Check Assumptions	fxadmin	2011-03		3/4/2011	Initialized
<input type="checkbox"/>	S&OP	Build Demand Plan	fxadmin	2011-03		3/11/2011	Initialized
<input type="checkbox"/>	S&OP	Conduct Pre-S&OP	fxadmin	2011-03		3/11/2011	Initialized
<input type="checkbox"/>	S&OP	Revise Assumptions and Plans	fxadmin	2011-03		3/16/2011	Initialized

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

- To update status for a task, check the box under the **Select** column and click **Change Status**
- Select the new status in the drop down box, enter a **comment** and press the arrow icon

The screenshot shows a table titled "My Workflow" with the following data:

Select	Process	Task	User Name	Cycle	Action	Deadline	Status
<input checked="" type="checkbox"/>	S&OP	Update Marketing Plan	fxadmin	2011-03		3/3/2011	Initialized
<input checked="" type="checkbox"/>	S&OP	Check Assumptions	fxadmin	2011-03			
<input checked="" type="checkbox"/>	S&OP	Build Demand Plan	fxadmin	2011-03			
<input type="checkbox"/>	S&OP	Revise Assumptions and Plans	fxadmin	2011-03			
<input type="checkbox"/>	S&OP	Build Supply Plan	fxadmin	2011-03		3/18/2011	Initialized

The "Change Status" dialog box is open over the "Build Demand Plan" row, showing:

- Status: Complete
- Comment: Finished tasks 3/11

A "Change Status" button is located at the bottom left of the table.

## 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
<input type="checkbox"/>	S&OP	Update Marketing Plan	fxadmin	2011-03		3/3/2011	Complete	3/25/2011 11:14:33 AM	Finished tasks 3/11
<input type="checkbox"/>	S&OP	Check Assumptions	fxadmin	2011-03		3/4/2011	Complete	3/25/2011 11:14:33 AM	Finished tasks 3/11
<input type="checkbox"/>	S&OP	Build Demand Plan	fxadmin	2011-03		3/11/2011	Complete	3/25/2011 11:14:33 AM	Finished tasks 3/11
<input type="checkbox"/>	S&OP	Revise Assumptions and Plans	fxadmin	2011-03		3/16/2011	Initialized		
<input type="checkbox"/>	S&OP	Build Supply Plan	fxadmin	2011-03		3/18/2011	Initialized		

## Update Status Graphics

### Update Status Graphics

- The graphic field next to **Status** will change based on the combination of Deadline and Status
  - For the status icon, green is for a future deadline; red is for past due
    - Initialized tasks are open circles, In Progress half full, Complete are full circles

My Workflow										
			My Status: In Progress		Date: 3/25/2011					
Select	Process	Task	User Name	Cycle	Action	Deadline	Status		Change Status Date/Time	Comment
<input type="checkbox"/>	S&OP	Revise Assumptions and Plans	fxadmin	2011-03		3/16/2011	In Progress		3/25/2011 11:18:16 AM	
<input type="checkbox"/>	S&OP	Build Supply Plan	fxadmin	2011-03		3/18/2011	In Progress		3/25/2011 11:17:44 AM	
<input type="checkbox"/>	S&OP	Conduct Pre-S&OP	fxadmin	2011-03		3/25/2011	In Progress		3/25/2011 11:18:53 AM	Moved Pre-S&OP due to schedule conflict.
<input type="checkbox"/>	S&OP	S&OP Meeting	fxadmin	2011-03		3/28/2011	Initialized			

## My Settings - My Workflow

### My Settings - My Workflow

- Under the **My Settings** tab, there is an option to select **My Workflow**
- Here you can change the cycles and the fields that appear on the Home Page

The screenshot shows the 'My Settings' page for 'My Workflow' in the QAD Planning Portal. The page has a navigation menu on the left with options like 'My Reports', 'My Notes', 'My Shortcuts', 'My Exceptions', 'My Charts', and 'My View'. The main content area displays a table of workflow tasks. The 'My Settings' tab is highlighted in the top navigation bar. The table has columns for 'Select', 'Process', 'Task', 'User Name', 'Cycle', 'Action', 'Deadline', and 'Status'. The tasks listed are all for 'S&OP' and are performed by 'fxadmin'.

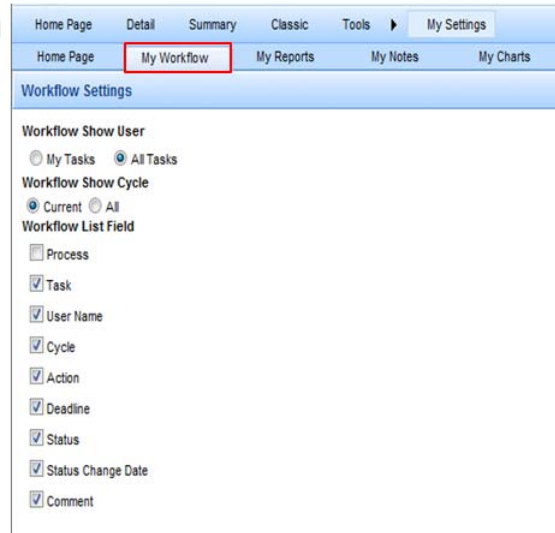
Select	Process	Task	User Name	Cycle	Action	Deadline	Status
<input type="checkbox"/>	S&OP	Update Marketing Plan	fxadmin	2011-03		3/3/2011	Init
<input type="checkbox"/>	S&OP	Check Assumptions	fxadmin	2011-03		3/4/2011	Init
<input type="checkbox"/>	S&OP	Build Demand Plan	fxadmin	2011-03		3/11/2011	Init
<input type="checkbox"/>	S&OP	Conduct Pre-S&OP	fxadmin	2011-03		3/11/2011	Init
<input type="checkbox"/>	S&OP	Revise Assumptions and Plans	fxadmin	2011-03		3/16/2011	Init

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## My Settings - My Workflow Tab

### My Settings - My Workflow Tab

- The **My Workflow** tab is used to show which columns will show up in the Workflow on the Home Page
- **Workflow** allows the user to update status and see important tasks that they need to accomplish



DM-MW-060

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

### My Settings - My Workflow Initial Setup

- The Workflow fields shown below are all selected by default and can be removed by un-selecting them and pressing the Save icon on the right











The screenshot shows the 'Workflow Settings' dialog box. The 'Workflow Show Cycle' section has 'All' selected. The 'Workflow List Field' section has the following fields checked: Process, Task, User Name, Cycle, Action, Deadline, Status, Change Status Date/Time, and Comment. The 'Save' button is highlighted in red.

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
<input type="checkbox"/>	 Build Supply Plan	2011-03		3/18/2011	In Progress		3/25/2011 11:17:44 AM	
<input type="checkbox"/>	 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.
<input type="checkbox"/>	 S&OP Meeting	2011-03		3/28/2011	Initialized			
<input type="checkbox"/>	 Update Marketing Plan	2011-04		4/3/2011	Initialized			
<input type="checkbox"/>	 Check Assumptions	2011-04		4/4/2011	Initialized			
<input type="checkbox"/>	 Build Demand Plan	2011-04		4/11/2011	Initialized			
<input type="checkbox"/>	 Conduct Pre-S&OP	2011-04		4/14/2011	Initialized			

## My Reports - Workflow

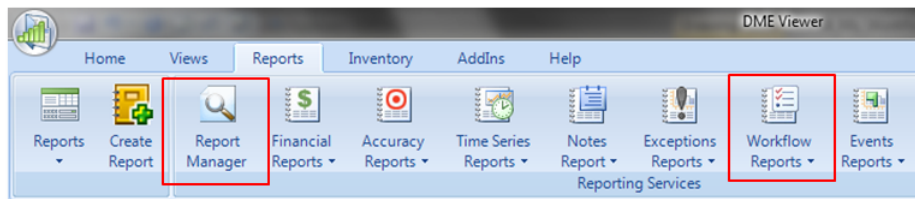
### My Reports - Workflow

- The **My Reports** panel has a default report called **Workflow**
- The information is updated real-time and the report contains all users so planners can see the status for the whole process

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	On Hold		

## 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



## My Workflow - Recap

### My Workflow - Recap

- The My Workflow panel shows a list of tasks with deadlines by user
- 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



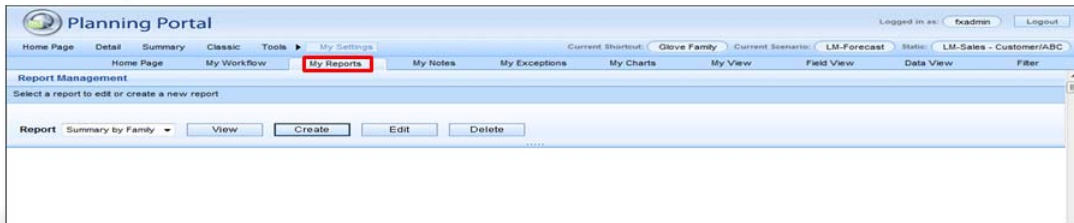
Chapter 5

# **My Reports**

## My Reports – Overview

### My Reports – Overview

- Planning Portal allows users to create their own custom reports
- Custom reports are created through the interface on the **My Reports tab** in the My Settings section
- You can save custom report criteria to run on demand, as well as edit or delete existing reports



## 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

## Creating a Report

# Creating a Report

- After clicking the Create button, a series of criteria fields are displayed below the buttons

The screenshot displays the 'Report Management' interface. At the top, it says 'Select a report to edit or create a new report'. Below this, there is a dropdown menu for 'Report' set to 'Summary by Family', and four buttons: 'View', 'Create' (highlighted with a red box), 'Edit', and 'Delete'. Underneath, there is a 'Report Name' field containing 'Summary by Family'. The main area is divided into six criteria fields, each with a blue header and a white body containing 'All Available': 'ProductFamily', 'Customer', 'Sku', 'LocationName', 'ProductBrand', and 'LocationRegion'.

## Creating a Report

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

The screenshot displays a configuration window for creating a report. It features five dropdown menus for selecting filter criteria, each with a blue header and a white body containing the text 'All Available'. The dropdowns are arranged in two columns: the left column contains 'ProductBrand', 'ProductClass', and 'UserField2'; the right column contains 'LocationRegion' and 'UserField7'. The background of the window is a light blue gradient.

## 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

The screenshot displays the 'Report Level' configuration interface. The 'Report Level' section on the left contains a list of 11 items, each with a checkbox and a numbered drop-down menu. The 'Options' section on the right contains a list of 10 items, each with a checkbox. The 'Calendar Jump' section at the bottom right has a single drop-down menu. A 'Save' button is located at the bottom center of the interface.

Report Level	Options
<input type="checkbox"/> Stu	<input checked="" type="checkbox"/> The Future Value
<input type="checkbox"/> LocationName	<input checked="" type="checkbox"/> Value
<input type="checkbox"/> ProductBrand	<input type="checkbox"/> ConvFactor04
<input type="checkbox"/> ProductClass	<input type="checkbox"/> ConvFactor01
<input type="checkbox"/> LocationRegion	<input type="checkbox"/> UserValue06
<input type="checkbox"/> BusinessSegment	<input type="checkbox"/> UserValue01
<input checked="" type="checkbox"/> ProductFamily	<input type="checkbox"/> ActShipments
<input type="checkbox"/> Customer	<input type="checkbox"/> Original
<input type="checkbox"/> BusinessPartner	<input type="checkbox"/> AvgEventValue
<input type="checkbox"/> BusinessUnit	
<input type="checkbox"/> ProductCode	

Calendar Jump: 0

Save

## Creating a Report

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

The screenshot displays a report configuration window with two main sections: 'Report Level' and 'Opinions'. The 'Opinions' section is highlighted with a red box.

**Report Level**

<input type="checkbox"/> Sku	1
<input type="checkbox"/> LocationName	2
<input type="checkbox"/> ProductBrand	3
<input type="checkbox"/> ProductClass	4
<input type="checkbox"/> LocationRegion	5
<input type="checkbox"/> BusinessSegment	6
<input checked="" type="checkbox"/> ProductFamily	7
<input type="checkbox"/> Customer	8
<input type="checkbox"/> BusinessPartner	9
<input type="checkbox"/> BusinessUnit	10
<input type="checkbox"/> ProductCode	11

**Opinions**

- The Future Value
- Value
- ConvFactor04
- ConvFactor01
- UserValue06
- UserValue01
- ActShipments
- Original
- AvgEventValue

**Calendar Jump**

0

Save

## Creating a Report

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

The screenshot displays a configuration window for creating a report. It is divided into two main sections: 'Report Level' and 'Opinions'. The 'Report Level' section contains a list of 11 items, each with a checkbox and a dropdown menu. 'ProductFamily' is selected with a checkmark and set to '7'. The 'Opinions' section contains a list of 8 items, each with a checkbox. 'The Future Value' and 'Value' are selected with checkmarks. Below the 'Opinions' section is a 'Calendar Jump' dropdown menu, which is highlighted with a red box and currently shows '0'. At the bottom right of the window is a 'Save' button, also highlighted with a red box.

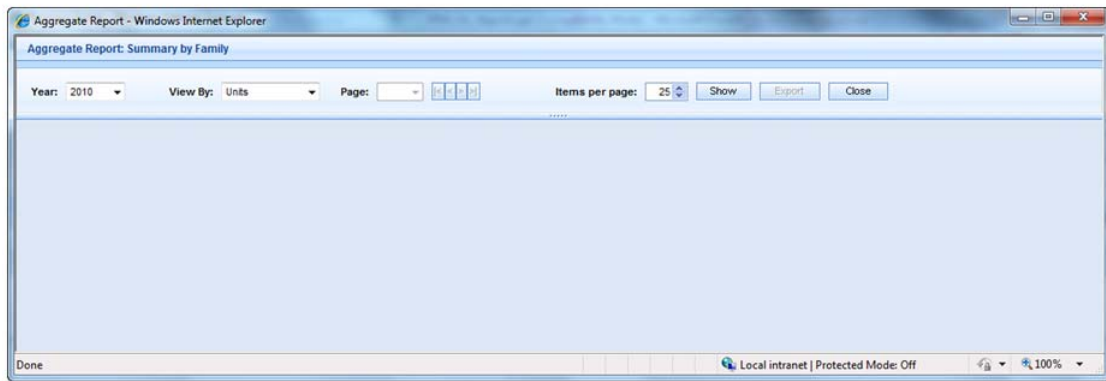
Report Level	Opinions
<input type="checkbox"/> Sku	<input checked="" type="checkbox"/> The Future Value
<input type="checkbox"/> LocationName	<input checked="" type="checkbox"/> Value
<input type="checkbox"/> ProductBrand	<input type="checkbox"/> ConvFactorG4
<input type="checkbox"/> ProductClass	<input type="checkbox"/> ConvFactorG1
<input type="checkbox"/> LocationRegion	<input type="checkbox"/> UserValue06
<input type="checkbox"/> BusinessSegment	<input type="checkbox"/> UserValue01
<input checked="" type="checkbox"/> ProductFamily	<input type="checkbox"/> ActShipments
<input type="checkbox"/> Customer	<input type="checkbox"/> Original
<input type="checkbox"/> BusinessPartner	<input type="checkbox"/> AvgEventValue
<input type="checkbox"/> BusinessUnit	
<input type="checkbox"/> ProductCode	

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

## 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



## 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

## 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

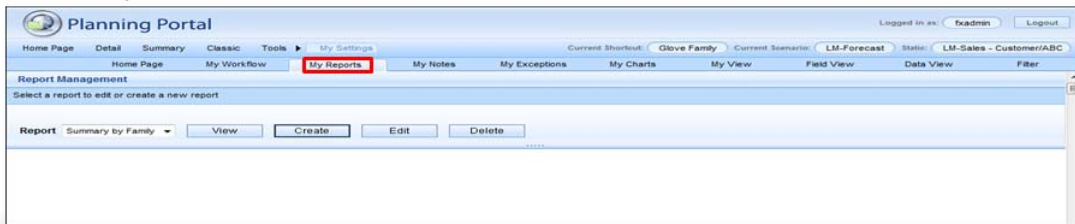
Year: 2009 View By: Units Page: 1 Items per page: 25 Show Export Close

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

## My Reports – Review

### My Reports – Review

- Planning Portal allows users to create their own custom reports
- Custom reports are created through the interface on the **My Reports tab** in the My Settings section
- You can save custom report criteria to run on demand, as well as edit or delete existing reports



Chapter 6

# My Charts

## My Charts

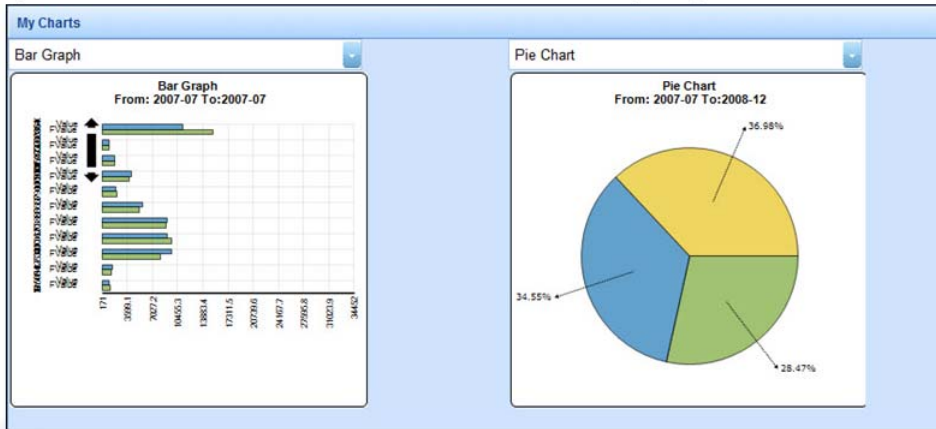
### My Charts

- 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

## My Charts Home Page

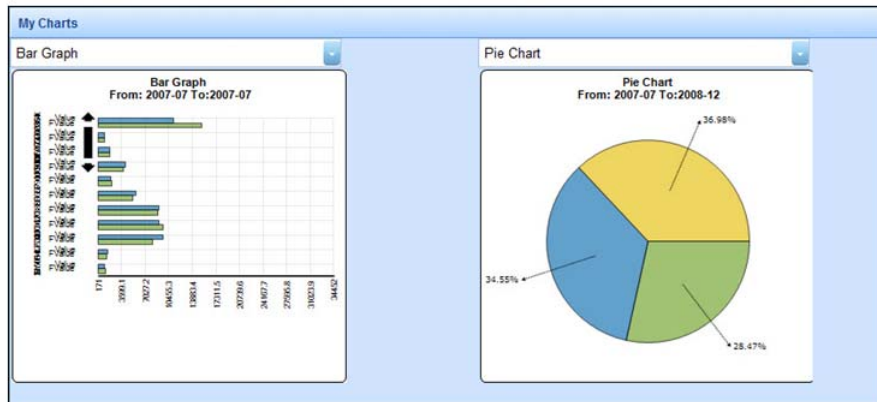
### My Charts Home Page

- 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



## 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

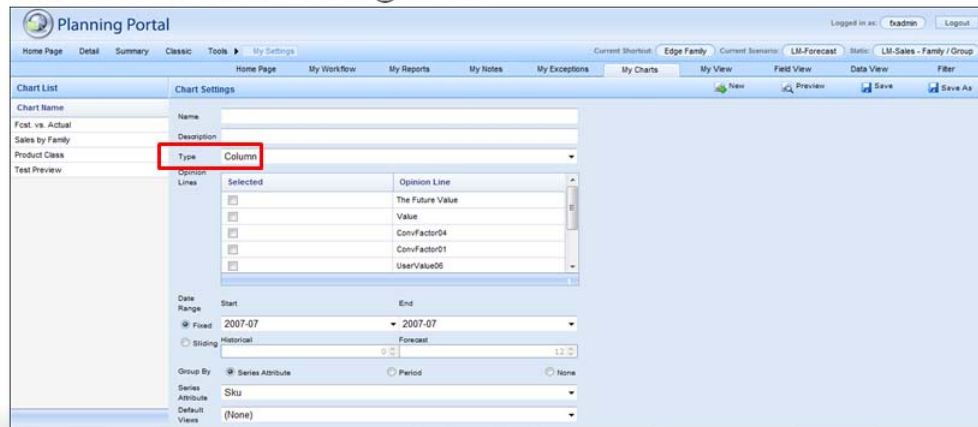
- The **My Charts** tab in the My Settings module is used to configure the charts that display on the Home Page

The screenshot shows the 'My Charts' configuration page in the Planning Portal. The page is titled 'Planning Portal' and shows the user is logged in as 'tadmin'. The navigation menu includes 'Home Page', 'My Workflow', 'My Reports', 'My Notes', 'My Exceptions', 'My Charts' (highlighted with a red box), 'My View', 'Field View', 'Data View', and 'Filter'. The 'My Charts' section is active, showing a 'Chart List' on the left and 'Chart Settings' on the right. The 'Chart Settings' section includes fields for 'Name', 'Description', 'Type' (set to 'Column'), 'Opinion Lines' (a table with columns 'Selected' and 'Opinion Line'), 'Date Range' (Start: 2007-07, End: 2007-07), 'Group By' (Series Attribute), 'Series Attribute' (SKU), and 'Default Views' (None).

Selected	Opinion Line
<input type="checkbox"/>	The Future Value
<input type="checkbox"/>	Value
<input type="checkbox"/>	ConfFactor04
<input type="checkbox"/>	ConfFactor01
<input type="checkbox"/>	UserValue06

## 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



## Customizing the My Charts Panel

- Opinion Lines
- Date Range
- Fixed range Vs. Sliding range
- Group By
- Series Attribute
- Default View

**Chart Settings**

Name:

Description:

Type: Column

**Opinion Lines**

Selected	Opinion Line
<input type="checkbox"/>	The Future Value
<input type="checkbox"/>	Value
<input type="checkbox"/>	ConvFactor04
<input type="checkbox"/>	ConvFactor01
<input type="checkbox"/>	UserValue06

Date Range: Start: 2007-07 End: 2007-07

Fixed  Sliding

Historical Forecast

Group By:  Series Attribute  Period  None

Series Attribute: Sku

Default Views: (None)



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- 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

Chapter 7

# Detail View

## Detail View - Overview

### Detail View - Overview

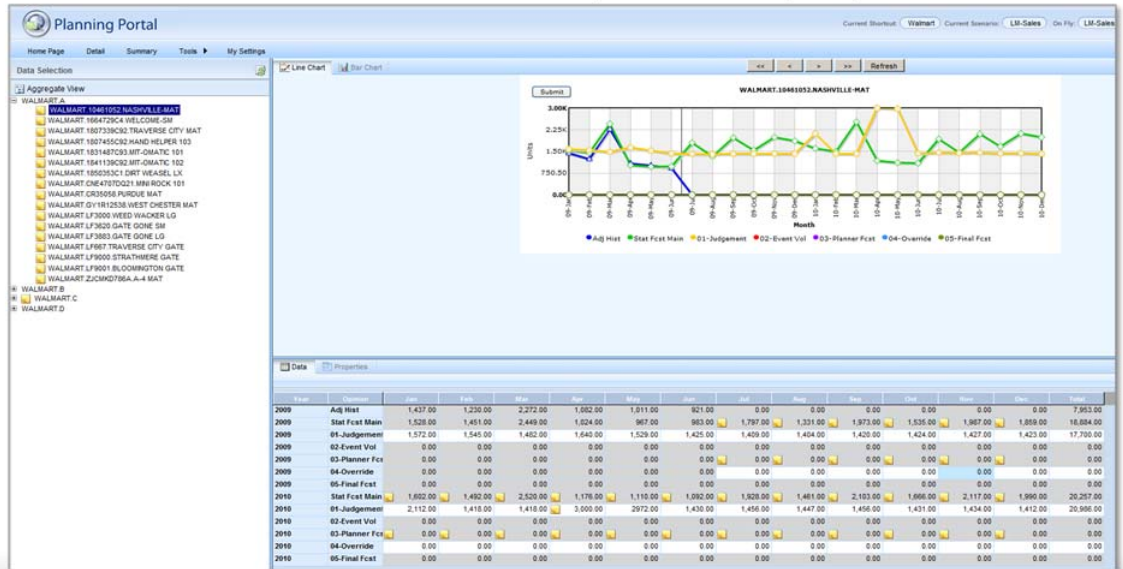
- The **Detail View** mimics the look and feel of the DME Viewer
- From the **My View** panel, you can choose whether or not to view the hierarchy (default value is "Yes")
- Left-side panel displays the hierarchy tree
- Upper panel displays a graph (either Line or Bar)
- Lower panel displays the data in a grid
  - To access the **Detail View**, click the **Detail tab** at the top of the Planning Portal



Detail View

# Detail View

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



















DW-DV-030

## Detail View – Data Selection

### Detail View – Data Selection

- In the **Aggregate View** section in the left-hand pane, click on the "+" icon to expand the list
- You can also temporarily hide the Series panel by clicking the **Display/Hide Series** icon above the Data panel
  - Click the icon again to show the Series

Data Selection 16 records found.	
	Description
	[1649492C2] [HAND HELPER 101]
	[1807455C92] [HAND HELPER 103]
	[1818402C2] [MEGA POT]
	[1825181C91] [DIRT WEASEL 101]
	[1830606C94] [FLORAL POT]
	[1831487C93] [MIT-OMATIC 101]
	[1836542C1] [MIN POT]
	[1840078C1] [DIRT WEASEL 102]
	[1840773C1] [DIRT WEASEL 103]
	[1841139C92] [MIT-OMATIC 102]
	[1850353C1] [DIRT WEASEL LX]
	[GE37] [MCKOY SPADE]
	[GEH5054] [MIT-OMATIC LX]
	[KR062430B] [PEACHES SPADE]
	[ZBJ52772] [LOGAN SPADE]
	[ZJB235101G] [ADDISON SPADE]

## 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.



Year	Option	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	2,448.00	1,024.00	987.00	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

## Data Tab

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

Year	Option	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	2,448.00	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

## Properties Tab

### Properties Tab

- Click the **Properties tab** to view the properties for the current selection
- You cannot edit the information displayed on the Properties tab

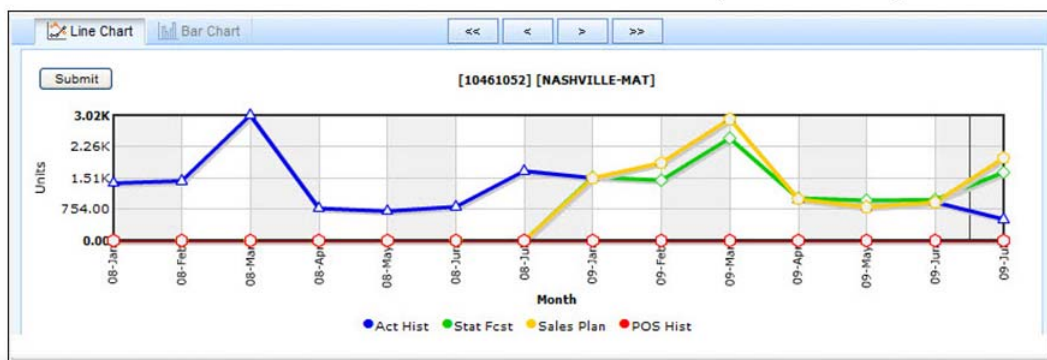


Field	Value
* Customer Nbr	
Customer Name	
* Item Nbr	1841139C92
Item Description	MIT-OMATIC 102

## Graph View

### Graph View

- The graph in the top panel of the screen shows a graphical representation of the current data
- You can modify any opinion line that is editable in the graph by clicking and dragging the lines to adjust the value
  - Click **Submit** when finished to save your changes



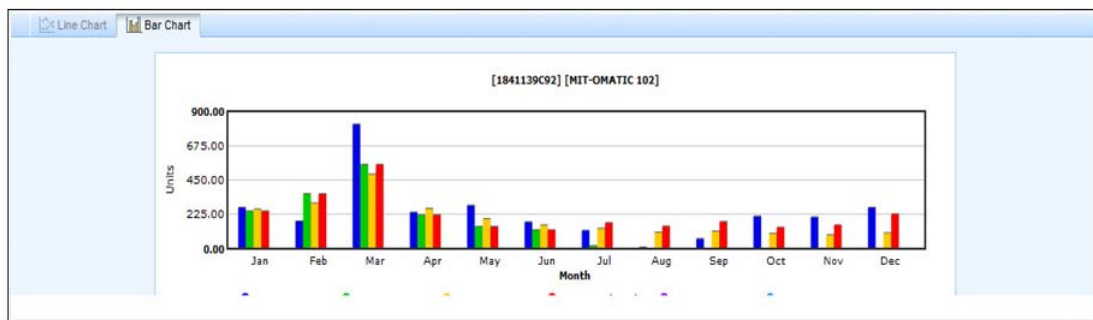
DM-DV-060

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

### Bar Charts

- The data can also be viewed in bar graph form by clicking on the **Bar Chart tab**
- Just as with the **Line Chart tab**, you can modify any opinion line that is editable in the graph by clicking and dragging the bars to adjust the value



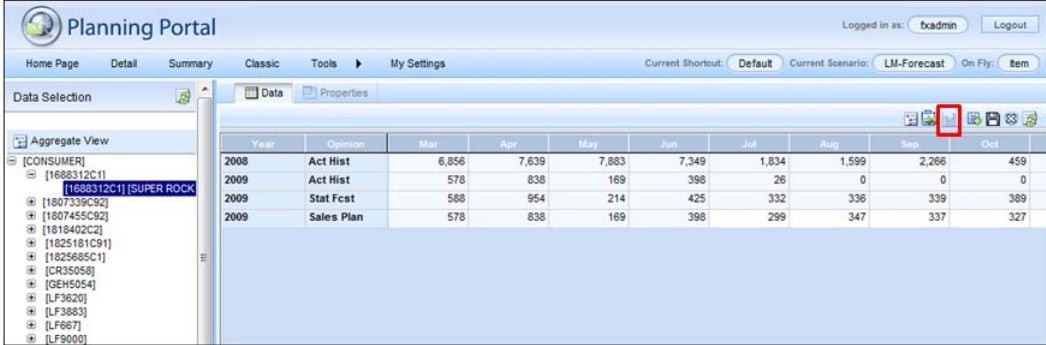
DM-DV-090

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

- Planning Portal also allows you to hide the Charts and only display the Data tab 



The screenshot shows the Planning Portal interface. The top navigation bar includes "Home Page", "Detail", "Summary", "Classic", "Tools", and "My Settings". The current scenario is "LM-Forecast" and the on-fly item is "Item". The "Data Selection" pane on the left shows a tree view with "Aggregate View" expanded, listing various consumer items. The "Data" tab is selected, and a red box highlights the "Data" icon in the top right corner of the data selection area. The main data table displays the following information:

Year	Option	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
2008	Act Hist	6,856	7,639	7,883	7,349	1,834	1,599	2,266	459
2009	Act Hist	578	838	169	398	26	0	0	0
2009	Stat Fcst	588	954	214	425	332	336	339	389
2009	Sales Plan	578	838	169	398	299	347	337	327

## 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

The screenshot shows the Planning Portal interface. The top navigation bar includes 'Home Page', 'Detail', 'Summary', 'Classic', 'Tools', and 'My Settings'. The user is logged in as 'fxadmin'. The 'Data Selection' panel on the left shows a tree view with 'Aggregate View' expanded, listing various consumer categories. The main 'Data' panel displays a table with columns for Year, Opinion, and months from Mar to Oct. A red box highlights the 'Display/Hide Detail Charts' icon in the top right corner of the Data panel.

Year	Opinion	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
2008	Act Hist	6,856	7,639	7,883	7,349	1,834	1,599	2,266	459
2009	Act Hist	578	838	169	398	26	0	0	0
2009	Stat Fcst	588	954	214	425	332	336	339	389
2009	Sales Plan	578	838	169	398	299	347	337	327


## Adding Notes in Detail View

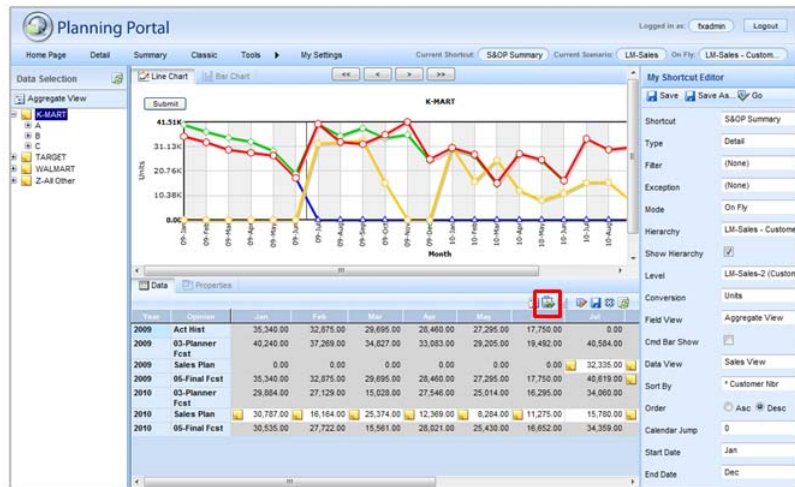
### Adding Notes in Detail View

- You can add notes to a series in the **Detail view** by clicking the **Notes icon** 
- If a note has already been added to a series, this icon  is displayed next to the series name
- Place your cursor over the icon to view a tool tip of the last note added or click on the icon to view a detailed list of the notes history

## Updating Data Settings in Detail View

### Updating Data Settings in Detail View

- The My Shortcuts icon  above the Data panel displays the shortcut panel and allows you to update the settings for the data displayed



## Updating Data Settings in Detail View

### Updating Data Settings in Detail View

- Make your changes to the parameters and click the **Go** button
- The data in the **Detail view** is updated and the graphs are refreshed
- If you want to save the selections as a new or existing shortcut, click the **Save** or **Save As** buttons
- Click the **My Shortcut Editor** icon again to hide the panel

## 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



Chapter 8

# Summary View

## Summary View - Overview

### Summary View - Overview

- The **Summary View** allows you to view data meeting your criteria in a Spreadsheet format
- You can use the buttons at the top of the screen to toggle an item between **Summary View** and **Detail View** without reloading
- You can make changes in **Summary View**, which will be transmitted to the **Demand Management Engine**
- The **Summary View** allows you to export the data to Excel

## Summary View

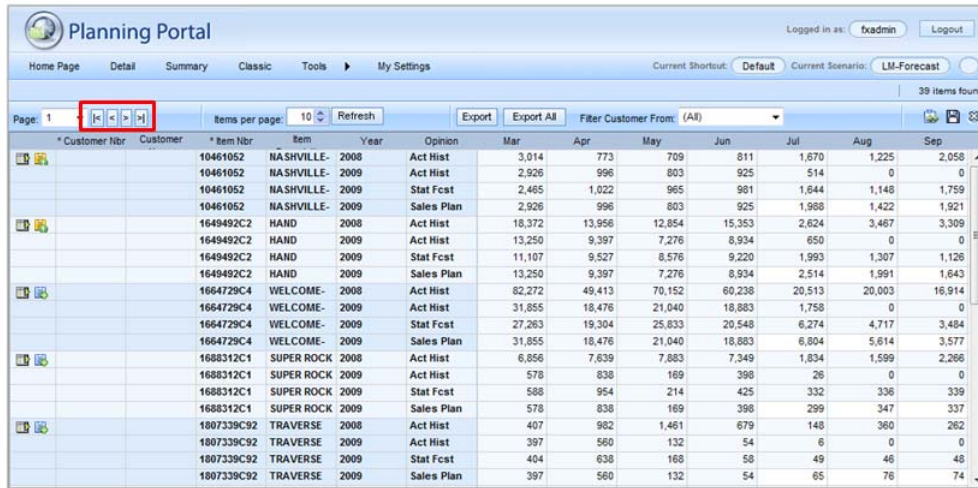
### Summary View

- To access the Summary View, click the Summary tab at the top of the Planning Portal



## 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 Fcat			2,465	1,022	965	981	1,844	1,148	1,759
10461052	NASHVILLE-	2009	Sales Plan			2,926	996	803	925	1,988	1,422	1,921
1648492C2	HAND	2008	Act Hist			18,372	13,956	12,854	15,353	2,624	3,467	3,309
1648492C2	HAND	2009	Act Hist			13,250	9,397	7,276	8,934	650	0	0
1648492C2	HAND	2009	Stat Fcat			11,107	9,527	8,576	9,220	1,993	1,307	1,126
1648492C2	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 Fcat			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 Fcat			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 Fcat			404	638	168	58	49	46	48
1807339C92	TRAVERSE	2009	Sales Plan			397	560	132	54	65	76	74

## 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

* Customer Nbr	* Item Nbr	Year	Opinion	Jan	Feb	Mar	Apr	M
99999	10461052	2009	Adj Hist	270.00	270.00	400.00	440.00	
99999	10461052	2009	Stat Fcst Main	276.00	258.00	334.00	367.00	
99999	10461052	2010	Stat Fcst Main	334.00	325.00	420.00	453.00	
99999	10461052	2010	04-Override	0.00	0.00	0.00	1,000.00	
99999	1649492C2	2009	Adj Hist	64,950.00	51,325.00	53,500.00	47,850.00	4
99999	1649492C2	2009	Stat Fcst Main	45,464.00	51,139.00	61,434.00	68,383.00	5
99999	1649492C2	2010	Stat Fcst Main	43,588.00	41,596.00	47,285.00	49,091.00	4
99999	1649492C2	2010	04-Override	0.00	0.00	0.00	1,500.00	

## Summary View – Detail View

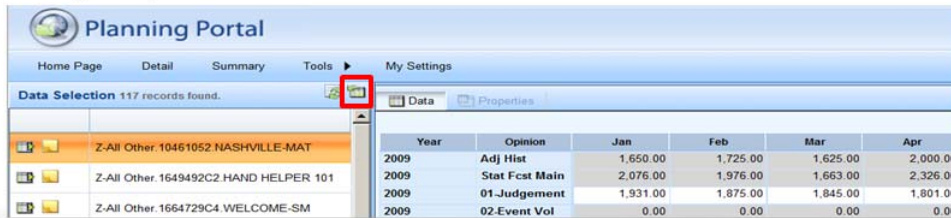
### Summary View – Detail View

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

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



Year	Opinion	Jan	Feb	Mar	Apr
2009	Adj Hist	1,650.00	1,725.00	1,625.00	2,000.00
2009	Stat Fcst Main	2,076.00	1,976.00	1,663.00	2,326.00
2009	01-Judgement	1,931.00	1,875.00	1,845.00	1,801.00
2009	02-Event Vol	0.00	0.00	0.00	0.00

## Summary View - Export

### Summary View - Export

- The Summary View allows you to export data to Microsoft Excel
- Click the Export button to export the selected data or click Export All to export all items to Excel

Planning Portal

Logged in as: fadmin Logout

Home Page Detail Summary Classic Tools My Settings

Current Shortcut: Default Current Scenario: LM-Forecast

39 items found

Page: 1 Items per page: 10 Refresh Export Export All Filter Customer From: (All)

* 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



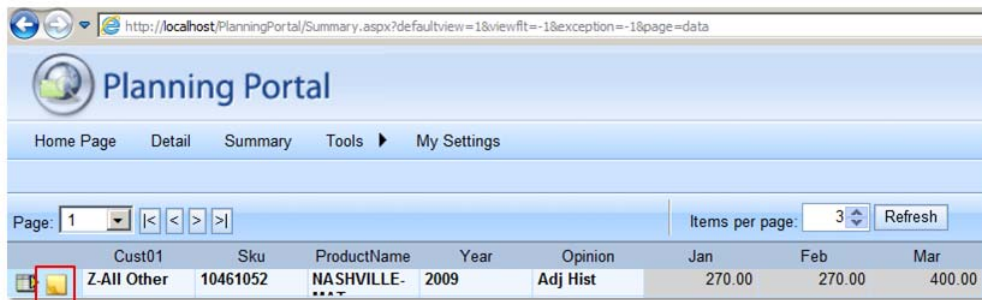
DVA-SV-070

- 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

### Summary View – Notes

- PP also provides the ability add notes to a series in the Summary View by clicking on  the Note icon
- Once a note has been added to a series, the Note icon  will display next to the series (see below at left)



The screenshot shows the Planning Portal interface. The browser address bar displays `http://localhost/PlanningPortal/Summary.aspx?defaultview=1&viewfit=-1&exception=-1&page=data`. The page title is "Planning Portal" and the navigation menu includes "Home Page", "Detail", "Summary", "Tools", and "My Settings". Below the navigation is a pagination control showing "Page: 1" and "Items per page: 3" with a "Refresh" button. The main data table has the following structure:

	Cust01	Sku	ProductName	Year	Opinion	Jan	Feb	Mar
	Z-All Other	10461052	NASHVILLE-	2009	Adj Hist	270.00	270.00	400.00



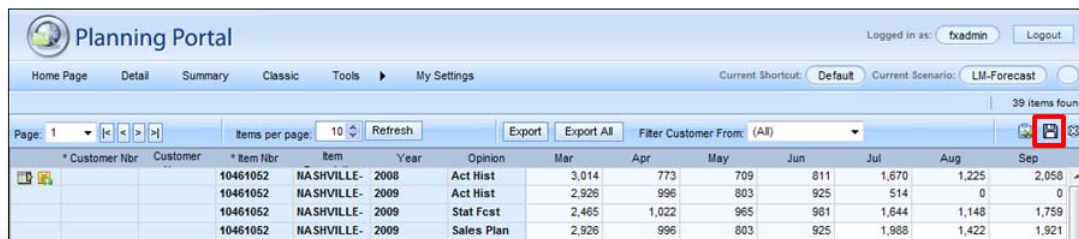
DM-SV-060

- 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

### Making Changes in Summary View

- The Summary View allows to manually update any value in the grid by clicking in an enabled cell to manually
- Click the **Save** icon when finished to save your changes
  - You must save your changes before refreshing the data or exiting the page or you will lose your changes



Planning Portal

Logged in as: fxadmin Logout

Home Page Detail Summary Classic Tools My Settings

Current Shortcut: Default Current Scenario: LM-Forecast

39 items found

Page: 1 Items per page: 10 Refresh Export Export All Filter Customer From: (All)

* 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	1,844	1,148	1,759
		10461052	NASHVILLE-	2009	Sales Plan	2,926	996	803	925	1,988	1,422	1,921

## Summary View - Recap

### Summary View - Recap

- The **Summary View** allows you to view data meeting your criteria in a Spreadsheet format
- In the **Summary View**, you can sort the data by column or adjust the column width as needed
- Attributes are frozen on the left when the scroll bar is moved
- You can use the buttons at the top of the screen to toggle an item between **Summary View** and **Detail View** without reloading
- The **Summary View** also allows you to export the data to Excel

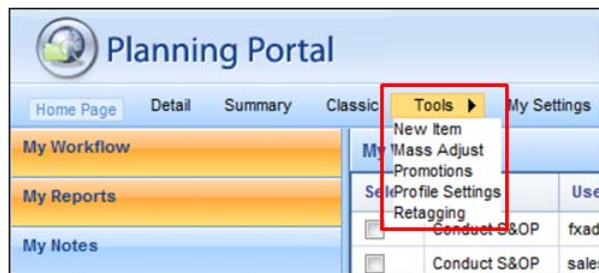
Chapter 9

# Tools Menu

## Tools Menu Overview

### Tools Menu Overview

- This section details the features available on the **Tools menu** in the Planning Portal
  - These options are based on user account privileges and may not be available to all users
  - Your System Administrator can configure your user permissions in the PP Admin Tool and grant you access to these features



DM-TM-020

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.

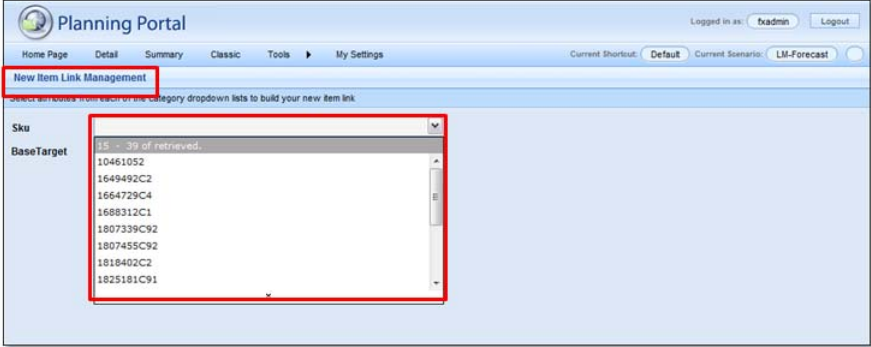
#### Retagging

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

New Item

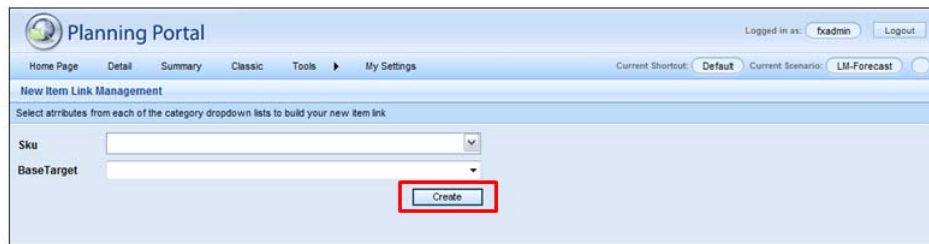
# New Item

- 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



## 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



The screenshot shows the 'New Item Link Management' interface in the Planning Portal. At the top, it says 'Logged in as: fadmin' and 'Logout'. Below that are navigation tabs: 'Home Page', 'Detail', 'Summary', 'Classic', 'Tools', and 'My Settings'. There are also 'Current Shortcut: Default' and 'Current Scenario: LM-Forecast' options. The main heading is 'New Item Link Management' with a sub-instruction: 'Select attributes from each of the category dropdown lists to build your new item link'. Below this, there are two dropdown menus labeled 'Sku' and 'BaseTarget'. A red rectangular box highlights the 'Create' button located at the bottom right of the form area.

Mass Adjust

# Mass Adjust

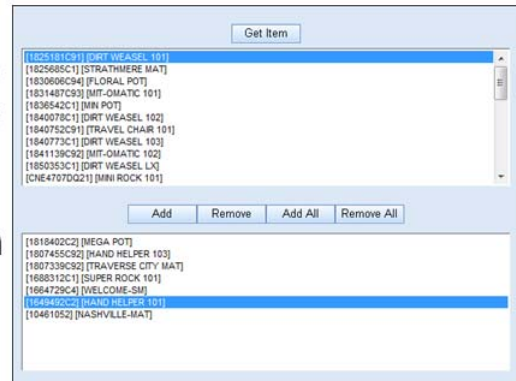
- The **Mass Adjustment Management** page consists of three different features
  - Filter a series
  - Select individual series to adjust
  - Perform the adjustment



## Selecting Filter Criteria

### Selecting Filter Criteria

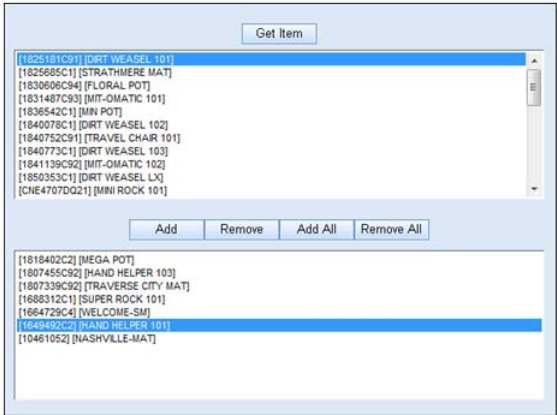
- Select the **filter criteria** you would like to use from each **Field View** selection box
- To select multiple options from one category, press the Ctrl key while selecting each option
- Click the **Get Item** button below the selection boxes
- A list of all of the items meeting your selected criteria are listed in the text box below the button



### Mass Adjustment

## Mass Adjustment

- **Select** the series you want to use from the list and move them below by clicking on the **Add** or **Add All** buttons
- The selected series are moved to the lower text box
- The selected series will be part of the **Mass Adjustment**
- To **remove** a selected series or all selected series, use the **Remove** and **Remove All** buttons



## Mass Adjustment Options

**Mass Adjustment Options**

1 **Direction**  Increase  Decrease

2 **Adjusted By**  Percentage  Amount

3 **Amount**

**Opinion Line**

- The Future Value
- ConvFactor04
- ConvFactor09
- ConvFactor10

4

**Start Date** 09 - Jul **End Date** 10 - Dec

5

**Kit Adjust:**

**Reason for Mass Adjust:**

QAD DMA-TM-060

- 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

### Kit Adjust

- In the **Kit Adjust** section, click the **Open** button to expand the field



DMA-TM-090

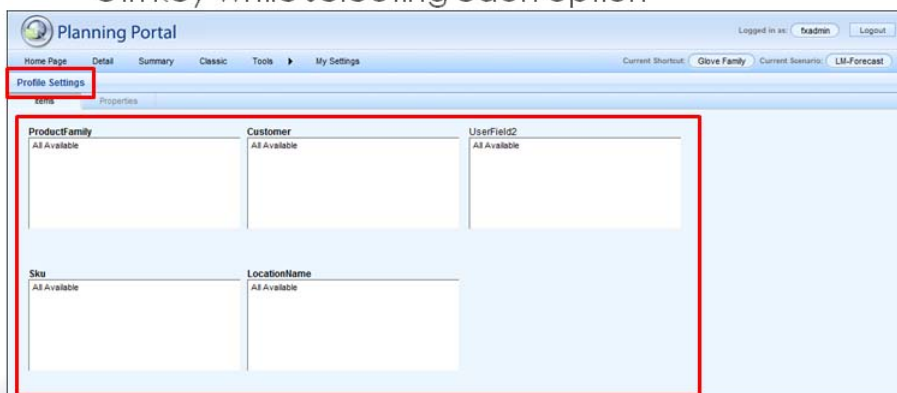
This feature enables you to set specific values for certain periods. There is one field for each period within the date range you specified in the Start Date and End Date fields.

- 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

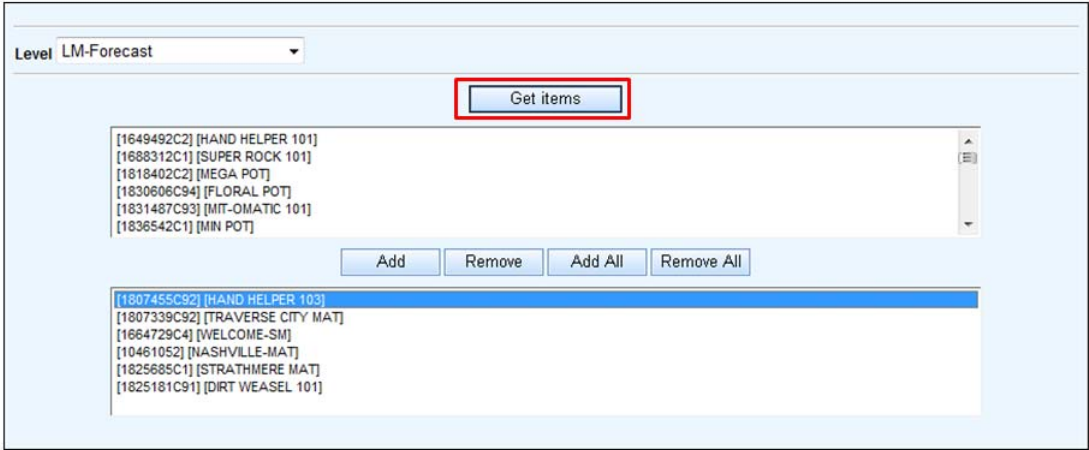
- The **Profile Settings** feature is used to configure the **Profile Forecast**
  - Select the criteria you would like to include in the forecast from each selection box
    - To select multiple options from one category press the Ctrl key while selecting each option



Profile Settings – Get Item

# Profile Settings – Get Item

- Click the **Get Item button** below the selection boxes
  - A list of all of the items meeting your selected criteria are listed in the text box below the button



## Adding Profile Settings

### Adding Profile Settings

- Select the items you want to use from the list and click on the **Add** or **Add All** buttons to move them to the lower text box
  - The items you are add will be part of your profile
  - To remove a selected series or all selected items, use the **Remove** and **Remove All** buttons

Level: LM-Forecast

Get items

[1649492C2] [HAND HELPER 101]  
[1688312C1] [SUPER ROCK 101]  
[1818402C2] [MEGA POT]  
[1830606C94] [FLORAL POT]  
[1831487C93] [MIT-OMATIC 101]  
[1838542C1] [MIN POT]

Add Remove Add All Remove All

[1807455C92] [HAND HELPER 103]  
[1807339C92] [TRAVERSE CITY MAT]  
[1864729C4] [WELCOME-SM]  
[10461052] [NASHVILLE-MAT]  
[1825685C1] [STRATHMERE MAT]  
[1825181C91] [DIRT WEASEL 101]

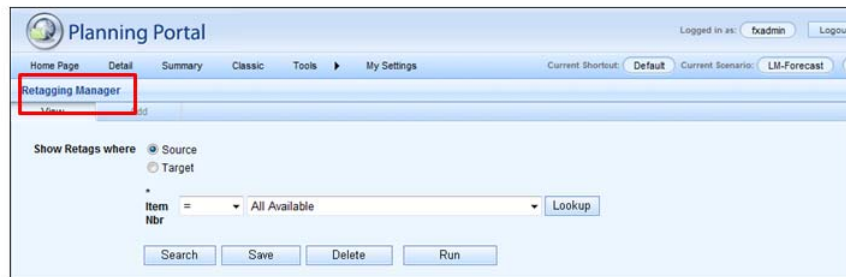
## Profile Settings – Properties Tab

- 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



Retagging – View Tab

# Retagging – View Tab

- **To find retags:** Select criteria and click **Search**
- **To run retags:** Select the **Retag check box** for the retag you want to run and click **Run**
- **To delete:** Select the **Delete check box** for the retag to remove and click **Delete**

Planning Portal

Logged in as: fxadmin Logout

Home Page Detail Summary Classic Tools My Settings Current Shortcut: Default Current Scenario: LM-Forecast Static: LM-Sales - Customer/ABC

Retagging Manager

View Add

Show Retags where  Source  Target

\* Item Nbr = All Available Lookup

Search Save Delete Run

Mapping ID	Data Range	Dates	* Item Nbr	Remain/Alloc %	Rfcst.	Reset	Retag	Delete
1	History	Start 4/17/2010	Source 1831487C93	100.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1		End 5/1/2010	Target 1807455C92	100.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Retagging – Add Tab

### Retagging – Add Tab

- The **Add tab** enables you to tag information from an old series to the corresponding fields in a new series

The screenshot shows the 'Retagging Manager' application window with the 'Add' tab selected. The interface is divided into several sections:

- Date Range:** A dropdown menu set to 'Retag historical data only'.
- Start Date:** A date selection field.
- End Date:** A date selection field.
- Source:** A dropdown menu for '\* Item Nbr'.
- Target:** A dropdown menu for '\* Item Nbr'.
- View Buttons:** Two 'View' buttons are positioned below the source and target dropdowns.
- Retain and Allocate:** Two input fields, both set to '100', with labels '% after retagging.' and '% to new product.' respectively.
- Checkboxes:** Four checkboxes are present: 'Reforecast source series.', 'Reforecast target series.', and 'Reset target series.' (all checked), and one unchecked checkbox.
- Save Button:** A 'Save' button is located at the bottom center.

The QAD logo is visible in the bottom left corner, and the document ID 'DMA-TM-1.60' is in the bottom right corner.

### 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