



User Guide

QAD Demand Management Engine

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Change Summary

The following table summarizes significant differences between this document and the version released with QAD Demand Management 5.5.

[illegible]

Chapter 1

Introduction

Overview 2

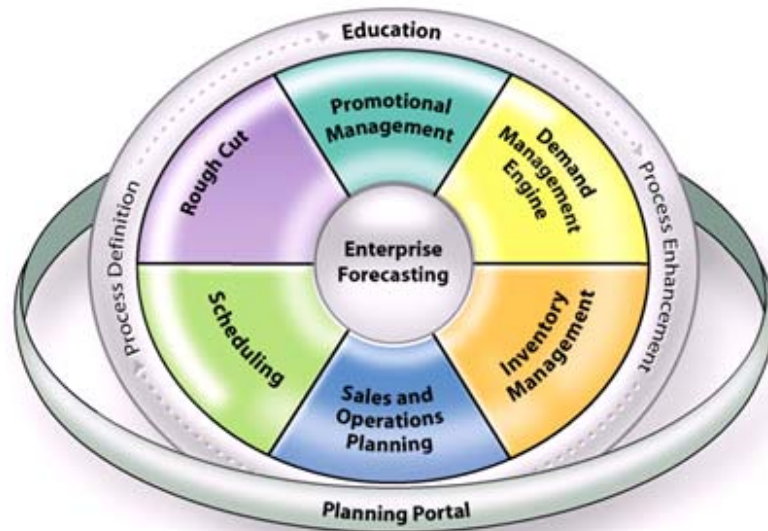
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Overview

The Demand Management Engine (DME) key features include:

- Support localization for currency and numeric values
- Event Manager
- Profile and Life Cycle Forecasting

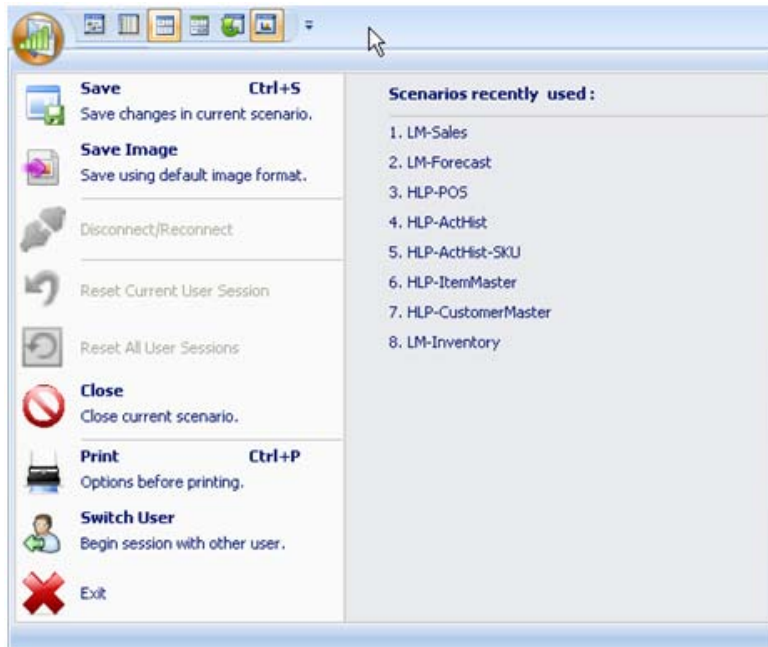


Logging In

You log in to the DME through the Viewer. Usernames and passwords are case-sensitive and assigned by your System Administrator.

Logging Out

If you would like to log out of the application, in the DME Viewer, select **Exit** from the DME menu (the icon in the upper left corner of the window - see below).



Documentation Conventions

Document Standards

The following table lists text conventions in this user guide.

Table 1.1 Text Convention Descriptions

Convention	Description
Text represented as a screen display.	This typeface represents displays that appear on your terminal screen, for example: lom>
Text represented as menu or sub-menu names.	This typeface represents all menu and sub-menu names within procedures, for example: On the File menu, click New .

Screen Captures

The example screens in this guide may not represent what you see on your monitor; use them only as guidelines.

Acronyms and Abbreviations

Table 1.2 Acronyms and Abbreviations used in this Manual

Term	Definition
ANOVA	ANalysis of VAriance
ARIMA	Auto-Regression Including Moving Average
BOM	Bill Of Materials
DF	Degrees of Freedom

Table 1.2 Acronyms and Abbreviations used in this Manual

Term	Definition
PO	Purchase Order
DME	Demand Management Engine
FG	Finished Goods
MAPE	Mean Absolute Percentage Error
MOU	Mass Observation Update
MSU	Mass Series Update

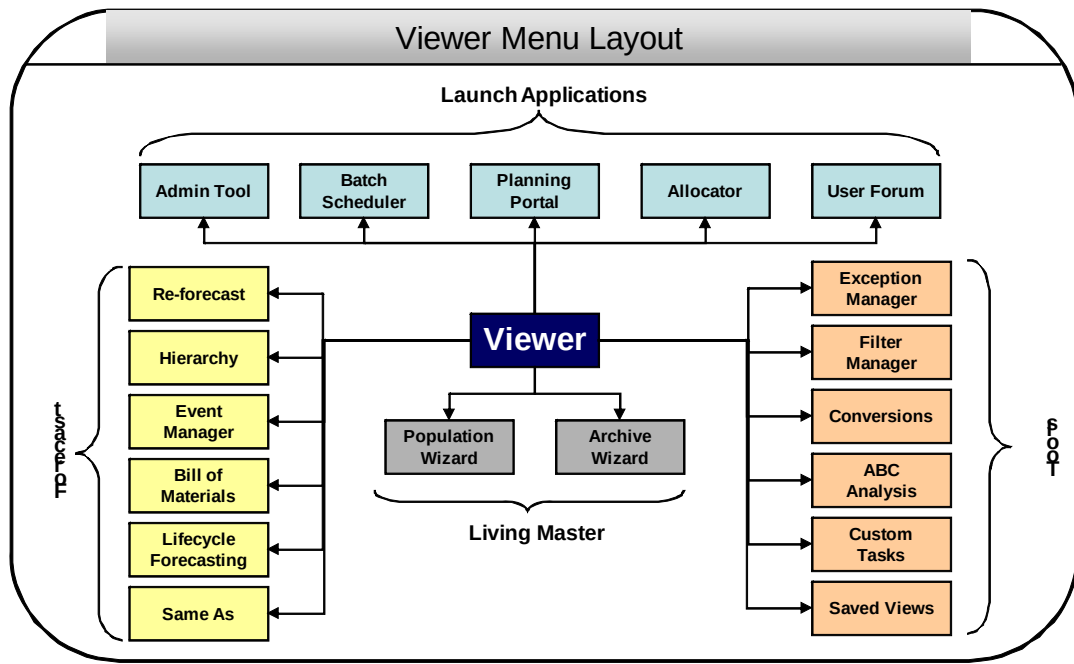
Viewer

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Overview

The Viewer controls and launches all the major features within the Demand Management Engine. The Viewer provides one central location to interact with the forecast.

The illustration below details the major features that are accessed from the Viewer.



The System Administrator is responsible for managing security to prevent users from accessing information or capabilities to which they should not have access. While all users have a similar interface, different aspects of the solution are activated depending on the role that they play within the forecasting process.

Users can perform the following tasks through the Viewer:

- View forecasts and associated data in several different forms.
- Transform or edit parts of the forecast using built-in tools.
- Launch other applications from the Planning Suite such as the Admin Tool, Batch Scheduler, and Planning Portal.

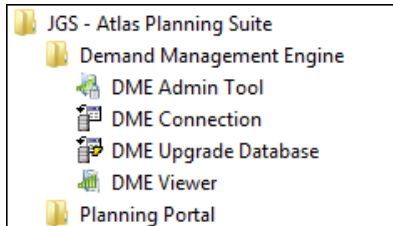
Note Your System Administrator must grant you permissions to use these applications.

The Viewer is the primary user interface for viewing a forecast's results. End users can enter adjustments or notes to track changes. The consensus forecast is visible to users with privileges.

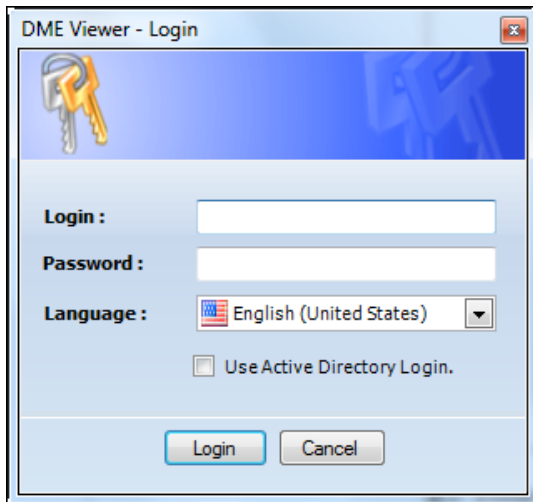
Viewer Management

Login to the Viewer

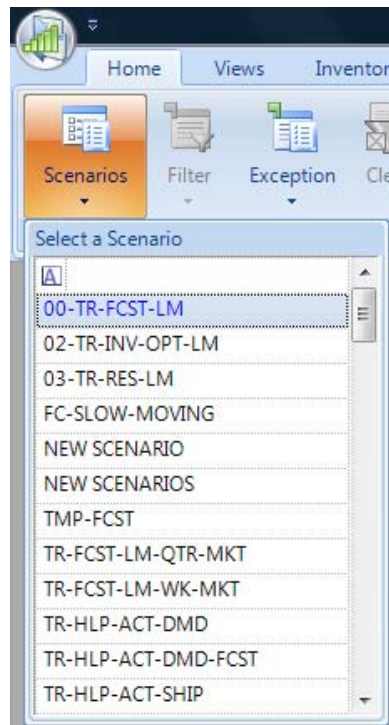
- 1 On your computer, click the **Start** button and go to **All Programs > QAD > Demand Management Engine > DME Viewer**.



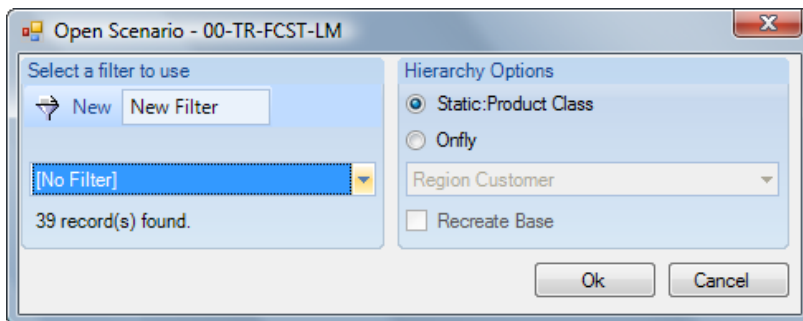
The **DME Viewer - Login** window displays.



- 2 Enter your username and password.
- 3 Use the **Language** drop-down list to select the language in which you want the Viewer to display.
- 4 Click **Login**.
The DME Viewer displays with no scenario loaded.
- 5 In the DME Viewer, click the **Scenario List** button in the ribbon located in the **Home** tab, select the scenario you want to load.



- 6 The Open Scenario dialogue box displays allowing you to filter the data that is displayed in the scenario.



Note To view the content of a Scenario, you must first define it using the Admin Tool. To learn more about defining a Scenario, see Chapter 4 in the Administration Guide.

- 7 Select an existing filter from the drop-down.
- 8 The record count below the filter drop-down updates to show how many Series would be returned by applying this filter to the selected scenario.
- 9 To create a new filter, enter a name for the filter and click the **New** button. For additional information on adding a new filter, please [See “Create a Filter” on page 98](#). If creating a filter directly from the Scenario Selection window, go to Step 3 in the “Create a Filter” section.
- 10 In the Hierarchy Options area, select either:
- **No Hierarchy** - open a scenario using the current state of the scenario.

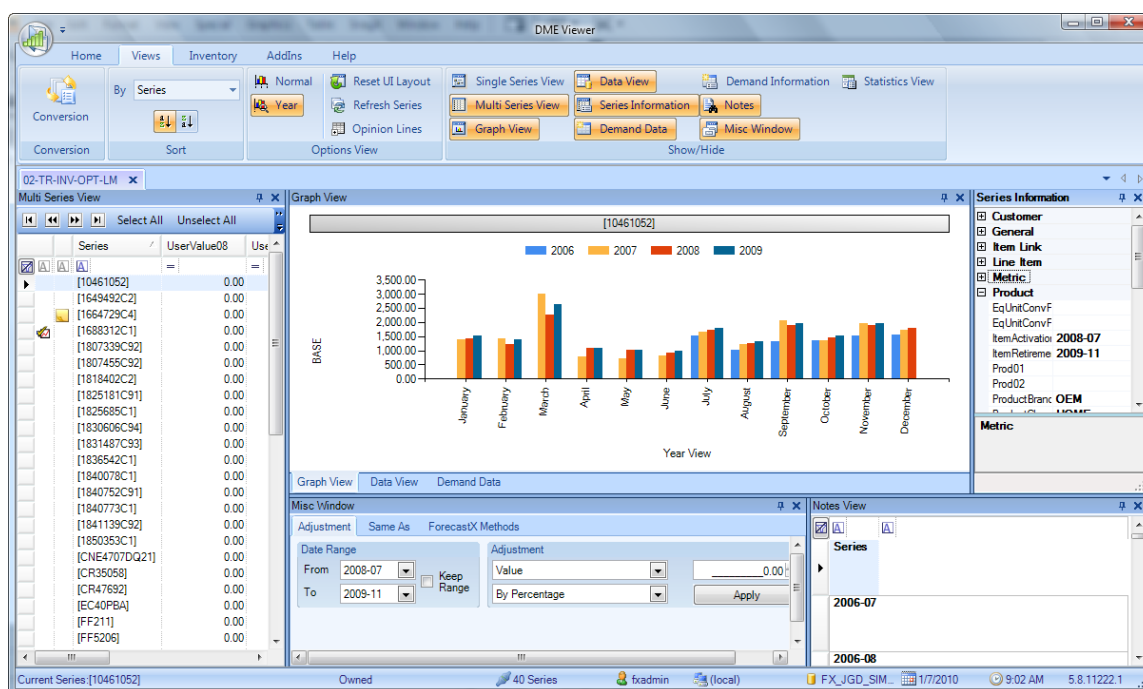
- **On-Fly** - open the Scenario using an On-Fly Hierarchy. For additional information on On-Fly Hierarchy, please [See “On Fly Hierarchies” on page 151](#). This section describes how to make hierarchies available in this drop down list so you can use them when opening scenarios.

Note If a Static Hierarchy has been applied to the Scenario the first option in this section displays the name of the Static Hierarchy that is currently applied to the Scenario. To remove a Static Hierarchy from a Scenario, you must open the Scenario and remove it. For additional information, please [See “Static Hierarchy Management” on page 136](#).

11 Click OK.

Note You can access other applications, including the DME Admin Tool, Batch Scheduler, and Planning Portal from the **Add-Ins** menu.

The selected Scenario is then displayed along with the various views available. You will learn more about each of these windows later in this chapter.



Once logged in, you will see the following information on the status bar on the DME Viewer, they are in listed in the order they are displayed from left to right:

Table 2.1

Field	Description
Current Series	Displays the currently selected series in the Viewer.
Scenario Mode	Displays the Mode in which the scenario was opened; scenarios can have one of three Modes: Owned, Living Master or Shared; for more information on the different available scenario modes and what each one means see Scenario Modes
Series Count	Displays the total number of series in the scenario, if there is a filter applied in the scenario this will reflect the total number of series after the filter has been applied.
User	This field displays the currently logged in user.

Table 2.1

Field	Description
Server	This field displays the server that hosts the DME database the DME Viewer is connected to.
Database	This field displays the database the DME Viewer is connected to.
Date	Displays the current date.
Time	Displays the current time.
Version	Displays the current version and build number of the application.

Scenario Modes

There are three different scenario modes that can be used when opening scenarios. You can see which mode applies to a scenario when opening a scenario. The Mode property in the Scenario Selection window indicates the mode in which the scenario is going to be opened.

Different users might see different modes for the same scenario.

- **Owned:** If a scenario displays this mode in the Scenario Selection window it means the user logged in created it, and that user can perform any operation on that scenario.

DTL Scenarios are owned by their respective users.

- **Living Master:** This mode is used only for living master scenarios when being access by a user other than the owner. Unless a user owns the living master scenario, they need special permission to view these types of scenarios. See the “User Permissions” section of the Administration Guide for more information.

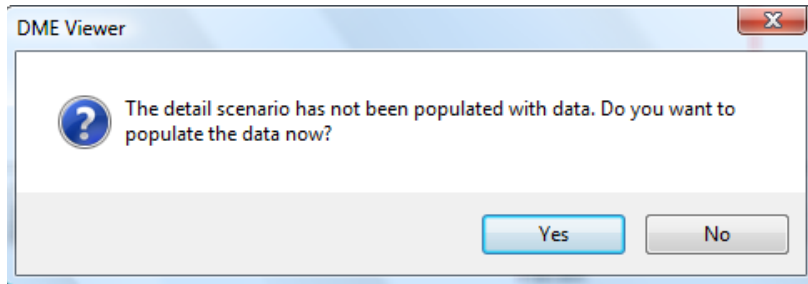
When users access a Living Master, the data they have access to is limited by the Data Domain and Data Permissions assigned to them. For more information on those two configurations, please see the DME Administration Guide.

When accessing a scenario in Living Master mode, users cannot apply Static hierarchies to the scenario; if you need a hierarchy applied you must use an On-Fly hierarchy.

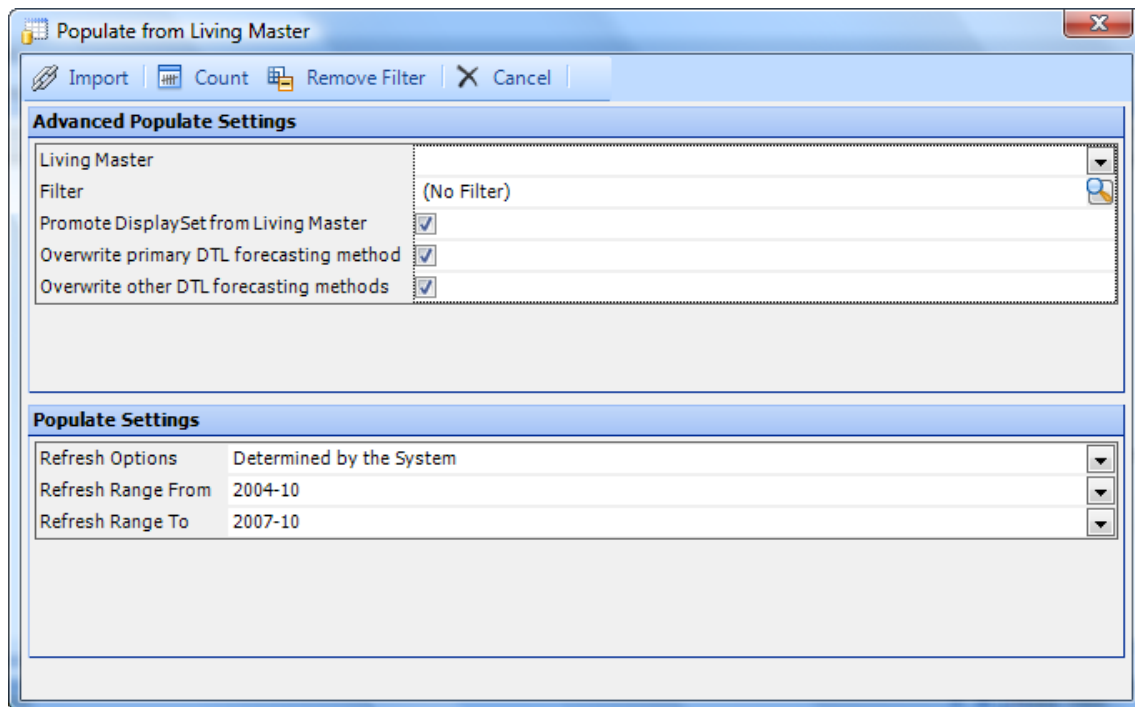
- **Shared:** These are scenarios that have been shared to the user. The operations allowed in these scenarios depend on the permissions a user has been given on shared scenarios. These permissions are set in the Admin Tool. Please see the Administration Guide for more information.

Populate a DTL Scenario

A DTL Scenario is created when a new user is added in the Admin Tool. To retrieve data from a Living Master Scenario, a user must first open the DTL Scenario in the Viewer. When opening the DTL Scenario for the first time, the user is asked if they want to populate the DTL Scenario.



Click **Yes** to open the **Populate from Living Master** window. You can also access this screen by clicking the **Living Master > Population Wizard** button in the **Tools** section of the **Home** menu.



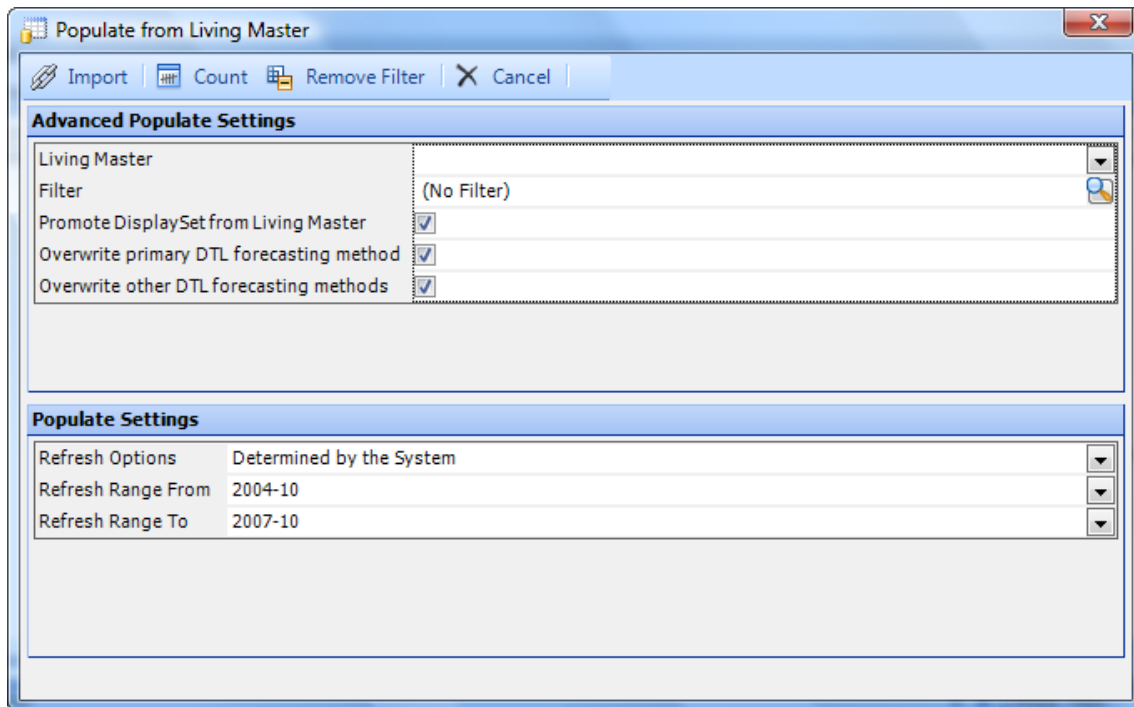
- 1 Select a **Living Master** from the drop-down list to populate your DTL Scenario with series from that Living Master. This field is **required**.
- 2 Select a **Filter** from the drop-down list to limit which series are downloaded from the Living Master Scenario to the DTL Scenario. The available filters have either been created by you or shared with you by another user.
You can create a new filter by typing a name in the text box next to the Add button and then click the **Add** button.
- 3 The record count will refresh to display the number of series that would be returned by applying the selected filter to this Living Master. Remember that the Data permissions assigned to you will affect the data returned from the Living Master. For more information, contact your administrator.

- 4 Select the **Promote Display Set from LivingMaster** checkbox to give the populated DTL Scenario the same Display Set that is applied to the Living Master Scenario. If this option is not selected, the DTL Scenario is either not given a Display Set or uses a Display Set applied to the DTL Scenario by the user.

- 5 Select the **Overwrite Primary DTL forecasting method** checkbox to overwrite the primary forecast setting in the DTL Scenario with the forecast method from the Living Master.
- If this option is checked, the Primary Forecast Setting will be overwritten in the DTL Scenario with the current settings from the Living Master.

- 6 Select the **Overwrite Other DTL forecasting methods** checkbox to overwrite all other forecast settings in the DTL Scenario with the Living Master forecast method.
- If this option is checked every Forecast Setting except the Primary one will be overwritten in the DTL Scenario with the forecast method from the Living Master.

Note Forecast Settings other than the primary will not be displayed in the ForecastX Method tab if the Target opinion line is not currently being displayed in the Graph View, Data View or Demand Data View.



- 7 The Refresh Options drop-down consists of three options:
- **Recreate Target Scenario** - will restore the scenario by removing any changes made to the DTL Scenario.
 - **Refresh Only** - only refreshes the periods and series already in the DTL Scenario.
 - **Determined by the System** - the system will define the best refresh option for you.
- 8 The **Refresh Range** fields are used to define the timeframe you wish to update in your DTL scenario. Any periods outside of this range will not be modified. The first time you populate, the Refresh Range will not have any periods available.

9 Click **Import**.

Commit Changes Back to the Living Master Scenario

To commit changes made to a DTL Scenario back to a Living Master Scenario, you must use the **Commit** feature located in the **Living Master** drop-down in the **Scenarios** section of the **Home** tab in the ribbon. The Commit feature applies the changes from all series with a series status of “Forecast Complete” to the Living Master Scenario.

When committing back changes to the Living Master only series attributes and opinion lines to which the user has permissions will be sent back to the Living Master. If the user has permissions to edit forecast settings these will be sent back to the living master scenario as well. For more information on user permissions see the Administration Guide.

Note Only items marked “Forecast Complete” will be moved back to the Living Master. If no items are marked Forecast Complete, DME will display a message box to notify the user.

Viewer Home Page

The main Viewer window has eight smaller windows that display the forecast data in different manners. If necessary, you can manually change the data on any of these tabs. The following sections describe each tab in additional detail.

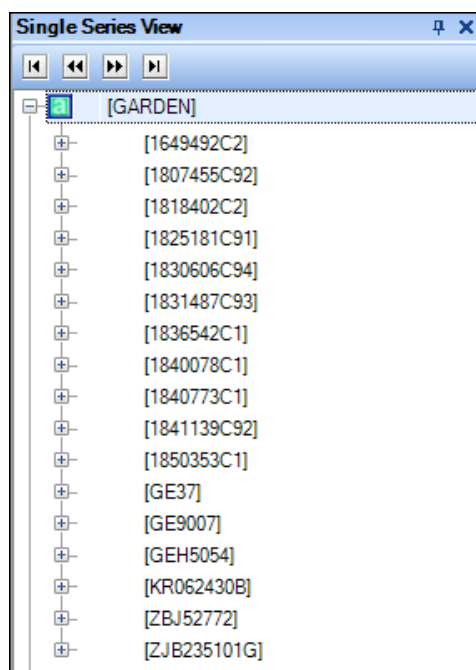
Table 2.2

Window	Description
Graph View	Displays information in graphical form. By default, the Actual Forecast and Adjusted History values are shown, but this setting can be configured.
Data View	Displays information in tabular format. By default, the Actual Forecast and Adjusted History values are shown, but this setting can be configured.
Demand Data	Displays information in a tabular form, including information pertinent to Inventory Management.
Misc Window	Consists of three tabs which provide the ability to adjust your forecast: • Adjustment - select the Date Range for the series. In the Adjustment area, select the Opinion Line to adjust and make your changes. • Same As - select the Method used, as well as which series to use. • ForecastX Methods - allows the user to change the method for one or more series as well as adding new forecast method definitions.
Demand Information	Provides information for the Demand Data and Safety Stock.
Series Information	Displays information on each Series such as Customer, Product, Statistics, and Status.
Graph Filter View	Displays a graphic breakdown of selected attributes that can be used to filter series data.
Notes View	Enables you to add notes to a specific series or to a particular observation which is associated with a single time period.

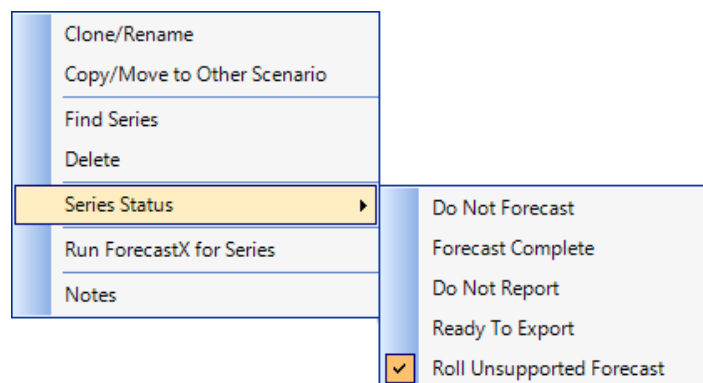
Single Series View

The Single Series View lists all series in the Scenario. Select a series in the left-hand pane to display its information in the main Viewer window.

You can also scroll through the series by using the arrows underneath the column header.



You can change the series' status by right-clicking on a series and selecting the **Series Status** option.



The following table details what each of these menu options mean.

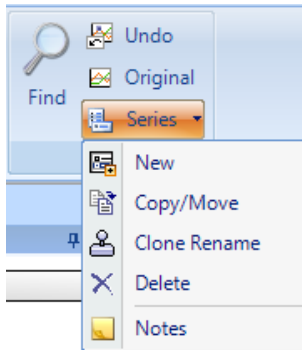
Table 2.3

Option	Description
Clone/Rename	Clone or rename the series.
Copy/Move to Other Scenario	Copy or move this series to another Scenario.
Find Series	Search for a specific series.
Delete	Delete a specific series.
Series Status	View the status of a specific series.

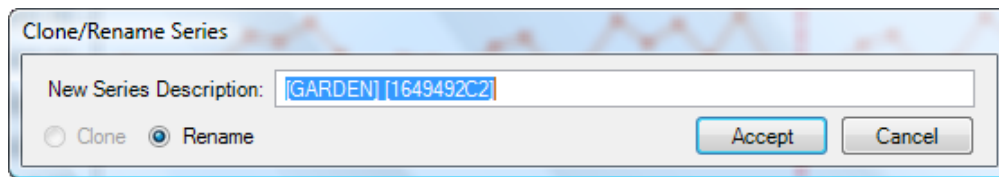
Clone/Rename

You can clone or rename a series from the Single Series View list.

- 1 In the Single Series View window, select a series from the list.
- 2 Right-click on the series and select **Clone Rename** or select the Clone Rename option located in the **Home** tab under the **Edit** Section and click on the **Series** button of the ribbon:



The **Clone/Rename Series** window displays.



- 3 Use the radio buttons to indicate whether you want to Clone or Rename this series.
 - 4 If you want to rename the series, enter the new name for the series in the **New Series Description** textbox.
- Note** Renaming a series will only change the label on the series. You will still need to access the Series Information and change the key fields to new distinct values.

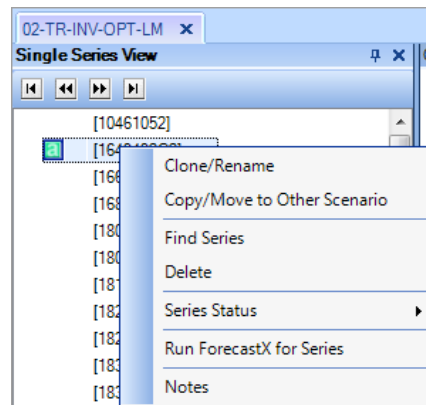
- 5 Click **Accept** when finished.

The series is copied and cloned in the list or renamed.

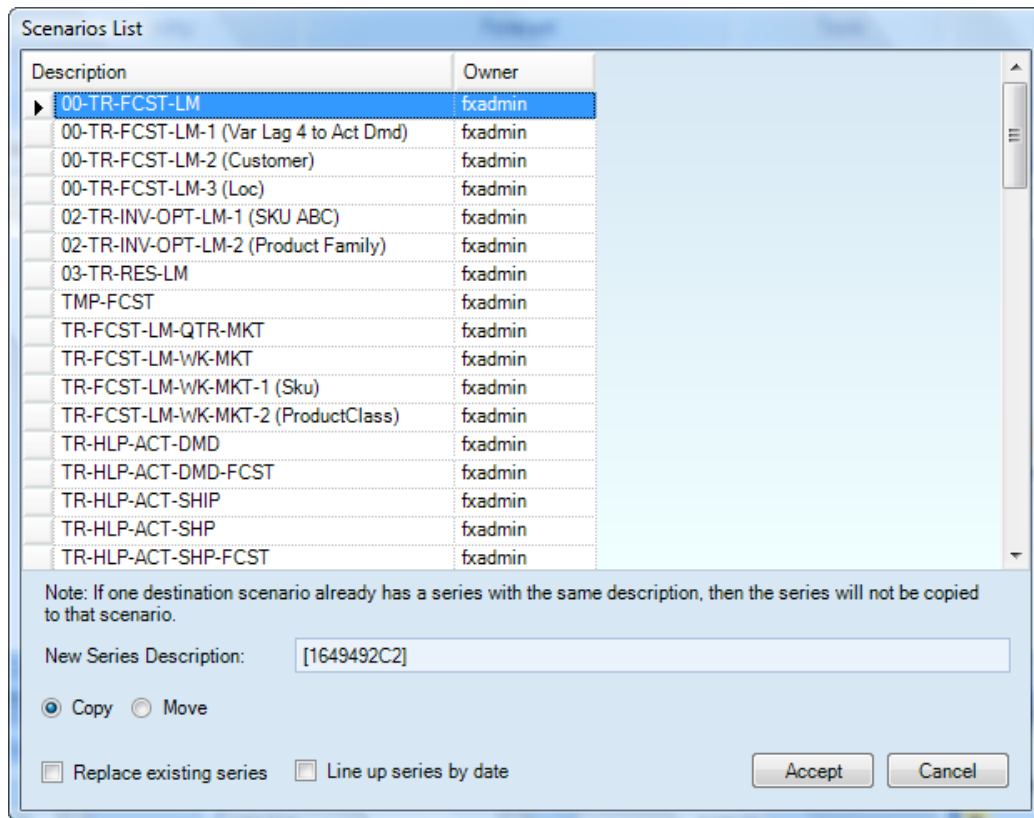
Copy/Move to Other Scenario

You can copy/move a series from the Single Series View list.

- 1 In the Single Series View, select a series from the list.
- 2 Right-click on the series and select the **Copy/Move to Other Scenario** option.



The **Scenarios List** window displays.



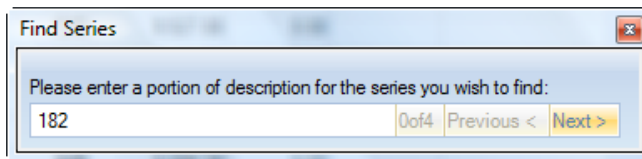
- 3 Select the Scenario from the list to which you would like to copy or move this series.
- 4 The **New Series Description** textbox displays the name of the selected series and can be used to edit the name of the series.
- 5 Use the radio buttons to indicate if you want to **Copy** or **Move** this scenario. If you select Copy, the series will be listed in both the original Scenario and the Scenario selected above. If you select Move, the series will be removed from its original Scenario.
- 6 Select the **Replace existing series** checkbox if there is another series in the Scenario with the same name.

- 7 Select the **Line up series by date** checkbox to organize the series by its date.
- 8 Click **Accept**. The series is then moved or copied.

Find Series

You can search for a series within the Single Series View list as follows:

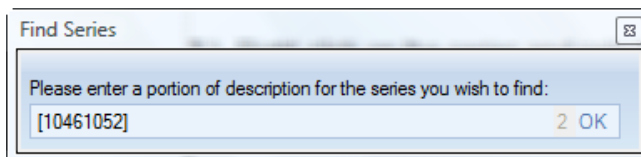
- 1 In the **Single Series View**, select a series from the list.
- 2 Right-click on the series and select the **Find Series** option.
The **Find Series** window displays.



- 3 Enter at least one keyword for your search, as you start typing you will be shown how many matches you have for the keywords typed so far.
- 4 Click **Next** or **Previous** to move through the series matching your key words.
The Viewer displays the first search result in the Graph View and Misc View, as well as selecting the result in the Single Series View, as you click on the “Next >” and “Previous <” buttons, you will be moved to the next or previous series that match your keywords.

While in the Multi series view you can also search for series, but the way the find feature works is slightly different:

- 1 In the **Multi Series View**, select a series from the list.
- 2 Right-click on the series and select the **Find Series** option.
The **Find Series** window displays.

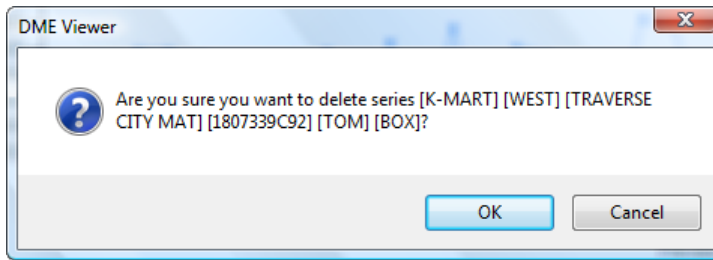


- 3 Enter at least one keyword for your search, as you start typing you will be shown how many matches you have for the keywords typed so far.
- 4 Once you click **OK**, the Multi Series View will be filtered to only display the matching series. To go back to displaying all series you can remove the filter on the Series column on the multi series view using the remove filter button.

Delete

You can delete a series from the Single Series View list.

- 1 In the **Single Series View** window, select a series from the list.
- 2 Right-click on the series you want to delete and select the **Delete** option.
The DME Viewer prompts you to confirm the deletion

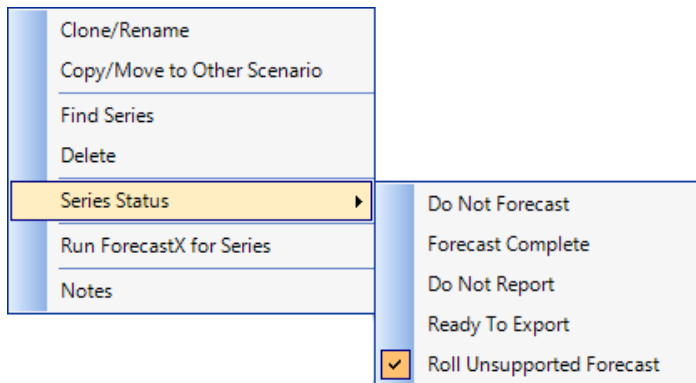


- 3 Click **OK**.

Series Status

You can view the status of a series from the Single Series View list.

- 1 In the **Single Series View**, right-click on a series from the list and select **Series Status**.
The following list of options is displayed:



The following table describes each option.

Table 2.4

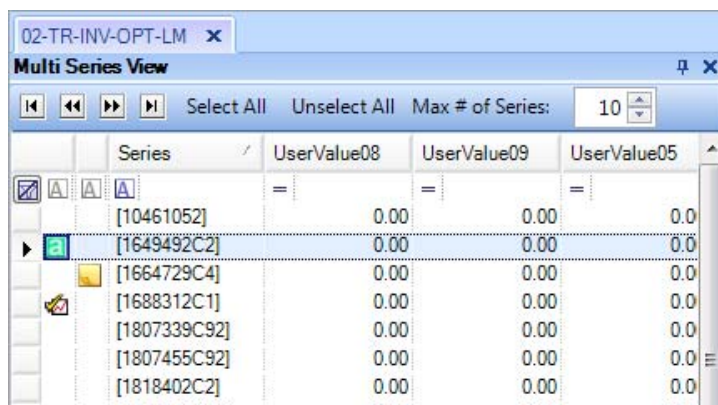
Option	Description
Do Not Forecast	Used to indicate that this series should not be forecasted when the Reforecast operation is run.
Forecast Complete	Used in conjunction with the DTL Scenarios. When committing changes back to the Living Master, only series marked with this flag are sent back to the Living Master. For additional information, please see Populate a DTL Scenario .

Table 2.4

Option	Description
Do Not Report	Used when creating Pivot reports. For additional information, please See “Create Pivot Reports” on page 188.
Ready To Export	Used when creating Pivot reports. For additional information, please See “Create Pivot Reports” on page 188.
Roll Unsupported Forecast	Used with DRP. This flag toggles the “Roll Sales” option. It is used in the DRP process to include any unsupported forecast in the next period’s recommended orders. For additional information, please refer to the Inventory Management User Guide.

Multi Series View

The Multi Series View lists all series in the selected Scenario. Select any series in the left-hand pane to see its information in the main Viewer window. The Single Series View will always display by default when you open the Viewer. To switch to the Multi Series View, go to the **Views** menu and click the **MultiSeries View** button in the **Show/Hide** section. You can use the arrow buttons in the Multi Series View toolbar to scroll through the series.



To select in the Multi Series View, simply click on a series. To select multiple series, press and hold the **Ctrl** key while selecting each series. To select a range of series, click on the first series in the range, press and hold the **Shift** key, and click the last series in the range.

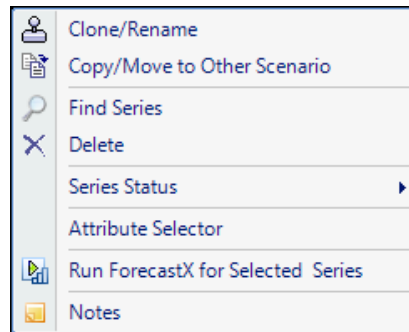
If the Data View pane is displayed while selecting multiple series, each time you select a new series, a new column is added to the Data View named after that series description. This new column displays the data from the first opinion line selected in the Data View. To change the first opinion line in the list see [“Add or Remove Opinion Lines in a View” on page 90.](#)

The **Max # of Series** parameter, determines how many extra columns will be added to the Data View when selecting multiple series. In the above example, only the first 10 series selected will include a column and any series beyond the 10th will not.

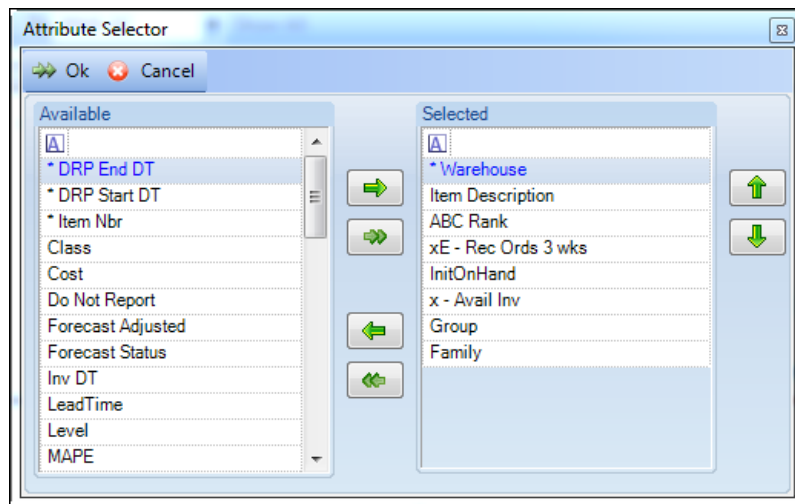
Any Icons in the series, such as notes, events, and series status, will display automatically when the Multi Series View is loaded.

Customizing the Multi Series View

To customize the data displayed by the Multi Series View, right-click on any series and select **Attribute Selector**.



The Attribute Selector window displays:



Select the fields to display from the **Available** list and use the arrow buttons to move them to the **Selected** list. Use the **Up** and **Down** arrow buttons next to the Selected list to change the order in which these fields display.

Click **OK** when finished to save these settings and exit. Click **Cancel** to exit without saving. Once the Opinion Lines or Attributes are added, they can be used to filter the series list.

Summary View

The Summary View allows you to view opinion line data in report format. In this view the series are in rows and the periods are in the columns. You can customize the view by adding or removing attributes and opinion lines.

To switch to the Summary View, go to the Views menu and click the **Summary View** button in the Show/ Hide section. If desired, you can click the right mouse button and select “Hide All But This” to close all other windows.

You can use the From and To drop-downs to indicate the periods that are displayed in the Summary View.

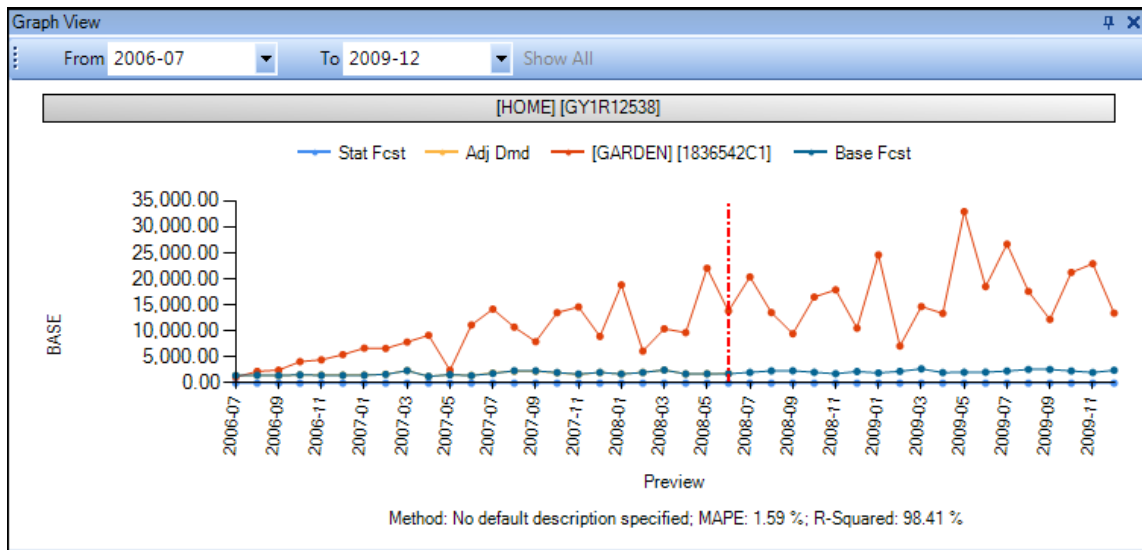
Series	Opinion Lines	2009-23	2009-24	2009-25	2009-26	2009-27	2009-28	2009-29	2009-30
[1688312C1] [SUPER ROCK 101] [vH A]	Stat Fcst Main	874	848	848	848	916	968	968	968
[1664729C4] [WELCOME-SM] [vH B]	Adj Hist								
[1664729C4] [WELCOME-SM] [vH B]	Stat Fcst Main	1,372	1,342	1,342	1,342	1,256	1,191	1,191	1,191
[1664729C4] [WELCOME-SM] [vH A]	Adj Hist								
[1664729C4] [WELCOME-SM] [vH A]	Stat Fcst Main	4,573	4,473	4,473	4,473	4,186	3,970	3,970	3,970
[1649492C2] [HAND HELPER 101] [vH B]	Adj Hist								
[1649492C2] [HAND HELPER 101] [vH B]	Stat Fcst Main	3,041	2,915	2,915	2,915	4,300	5,338	5,338	5,338
[1649492C2] [HAND HELPER 101] [vH A]	Adj Hist								
[1649492C2] [HAND HELPER 101] [vH A]	Stat Fcst Main	10,137	9,716	9,716	9,716	14,332	17,795	17,795	17,795
[10461052] [NASHVILLE-MAT] [vH B]	Adj Hist								
[10461052] [NASHVILLE-MAT] [vH B]	Stat Fcst Main	148	148	148	148	225	282	282	282
[10461052] [NASHVILLE-MAT] [vH A]	Adj Hist								
[10461052] [NASHVILLE-MAT] [vH A]	Stat Fcst Main	495	493	493	493	749	940	940	940
Total By Opinion Lines									
	Adj Hist	0	0	0	0	0	0	0	0
	Stat Fcst Main	100,718	102,200	102,200	102,200	118,457	130,649	130,649	130,649

The Summary View also allows you to manage the series by right-clicking and using the menu to copy, move, clone, delete, rename, and change the status for the selected series. This menu also allows you to enter notes for the series, customize the opinion lines included, save the series as an event, and run the forecast for the selected series.

Series	Opinion Lines	2009-01	2009-02
[10461052] [NASHVILLE-MAT] [vH A]	Value	.00	1,529.00
[10461052] [NASHVILLE-MAT] [vH B]	FValue	.00	7,127.00
[10461052] [NASHVILLE-MAT] [vH C]	Value	.67	1,094.11
[10461052] [NASHVILLE-MAT] [vH D]	FValue	.67	2,574.78
[10461052] [NASHVILLE-MAT] [vH E]	Value	.00	6,343.00
[10461052] [NASHVILLE-MAT] [vH F]	FValue	.00	1,931.00
[10461052] [NASHVILLE-MAT] [vH G]	Value	.67	23,448.61
[10461052] [NASHVILLE-MAT] [vH H]	FValue	.00	2,461.00
[1825685C1] [Value]	Value		
[1825685C1] [FValue]	FValue	3,329.00	3,329.00
[1830606C94] [Value]	Value		
[1830606C94] [FValue]	FValue	4,433.67	4,436.44
[1831487C93] [Value]	Value		

Graph View

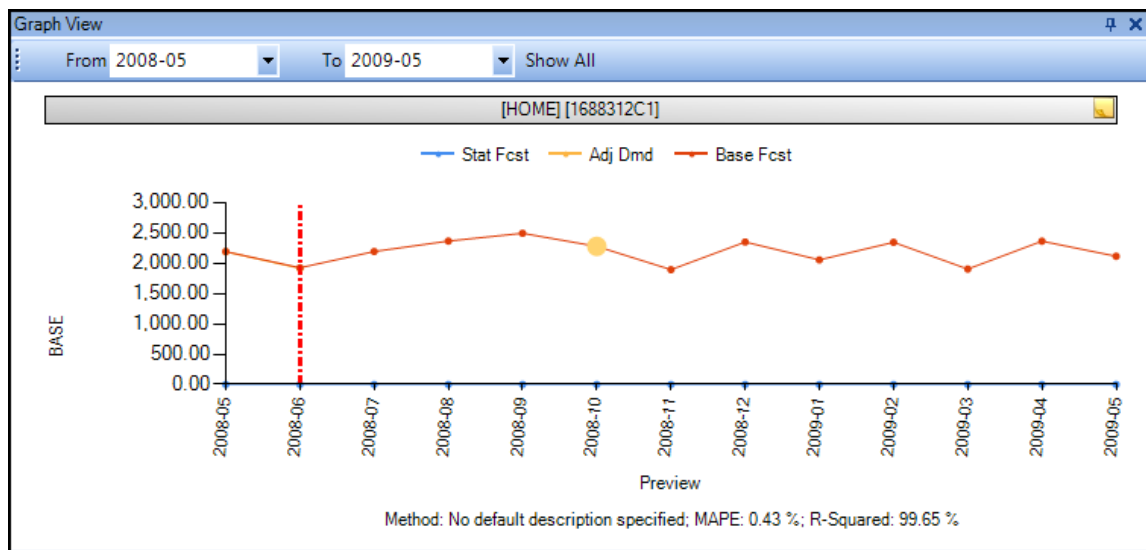
The Graph View is the default view when you open a Scenario for the first time. This view displays the series in a line graph in two modes: Normal view and Year view.



You can adjust the date range of the data displayed by clicking in the graph and dragging to the right or left to select the range or by changing the **From** and **To** dates using the drop-down lists above the graph. These two drop-down lists determine the default data range that is displayed in the graph. To reset the range and display all periods in the graph view, click the **Show All** button.

Use the scroll bar at the bottom of the graph to view entire date range of the data.

When a note is added to an observation point, the graph is updated to show a larger point on the graph, and a note icon displays next to the series name in the header. For example, the following screenshot shows that there has been a note added for October of 2008 for the Forecast line.



Graph View Options

There are additional options from the Graph View window to adjust the view. Right-click on the graph to open the following menu:

From
To
From And To
Min
Max
Chart Type ▶
Select Opinion Lines to Show
Zoom In ▶
Zoom Out
Save
Series Status ▶

The following table details what each option means:

Table 2.5

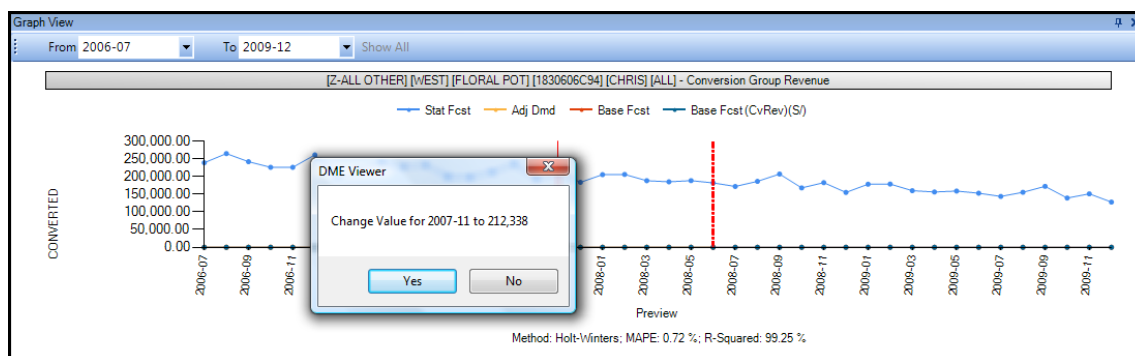
Option	Description
From	Used for the Adjustment section in the Misc Window. When this option is selected, the period you right-clicked on will be set as the “From” period in the Adjustment section.
To	Used for the Adjustment section in the Misc Window. When this option is selected, the period you right-clicked on will be set as the “To” period in the Adjustment section.
From and To	Used for the Adjustment section in the Misc Window. When this option is selected, the period you right-clicked on will be set as the “From” and “To” period in the Adjustment section.
Min	Used for the Adjustment section in the Misc Window, specifically when using the New Product adjustment type. When this option is selected, the Min field for the New Product curve will be set to the value on the graph where you clicked.
Max	Used for the Adjustment section in the Misc Pane, specifically when using the New Product adjustment type. When this option is selected, the Max field for the New Product curve will be set to the value on the graph where you clicked.
Chart Type	Changes the type of chart displayed in the Graph view for all the series. Note: The changes are only applied to the Scenario in which the setting was changed and is not saved after closing the Scenario.
Select Opinion Lines to Show	Used to include new Opinion lines for viewing. Any Opinion Line added in the Graph is also displayed in the Data View. For additional information, please See “Add or Remove Opinion Lines to views” on page 117.
Zoom In	Used to zoom into the graph and focus on a specific area. You can also zoom into the graph by clicking and selecting a range. Once you release the range selection the graph will zoom into that area.
Zoom Out	Used to zoom out when the graph has been zoomed in. This feature changes the zoom view of the graphs in set increments.
Save	Used to save the current graph as an image file.

Table 2.5

Option	Description
Series Status	Used to change the Series status for the current series. For additional information, please see Series Status .

Display Options

You can click on any point on the line graph to view the specific range of data for the graph.



Data View

The Data View is a grid containing all the series, observations and additional indices used in the forecast, including event flags if event modeling is used.

By default the first observation displayed by the Data view is determined by the **History** option just above the grid. If the history option is set to “2”, then there will be two historical periods displayed by default; you can scroll up to see more historical periods. The Historical periods are displayed in regular font, and the future, or forecast, periods are displayed in bold.

Note To customize this view, see [Chapter 3 Customizing the Viewer](#) for additional information.

Data View					
History 2 ☐ Transpose ☐ Export to Excel ☐ Expand/Collapse All					
Series					
Period	Beg Inv	Dep Dmd	Dmd Cvg Tgt	Sample Dmd Tgt	TTL Dmd
2009-05					
2009-06					
2009-07	8,435	0	60		4,083
2009-08	4,353	0	60		2,996
2009-09	1,357	0	60		4,366
2009-10	7,817	0	60		3,673
2009-11	4,144	0	60		4,286
2009-12	6,285	0	60		3,977
2010-01	2,307	0	60		3,577
2010-02	5,270	0	60		3,353
2010-03	1,917	0	60		5,404
2010-04	2,000	0	60		3,025
Data View Graph Data View Statistics View Advanced Statistics View					

By default, the Value and FValue display as the default historical and forecast opinion lines columns in the Data View.

Select the **Transpose** check box to change the orientation of the data and display the months horizontally across the top. Select this check box again to return to the default view.

The screenshot shows the 'Data View' window with the 'Transpose' checkbox checked. The window has a toolbar with 'History' (set to 2), 'Transpose' (checked), 'Export to Excel', and 'Expand/Collapse All'. Below the toolbar is a 'Series' section with a table of data. The table has columns for months from 2009-05 to 2009-12 and rows for various metrics. The 'TTL Dmd' row shows totals for each month.

Period	2009-05	2009-06	2009-07	2009-08	2009-09	2009-10	2009-11	2009-12
Beg Inv			8,435	4,353	1,357	7,817	4,144	6,285
Dep Dmd			0	0	0	0	0	0
Dmd Cvg Tgt			60	60	60	60	60	60
Sample Dmd Tgt								
TTL Dmd			4,083	2,996	4,366	3,673	4,286	3,977

At the bottom of the window are tabs for 'Data View Graph', 'Data View', 'Statistics View', and 'Advanced Statistics View'.

Use the **Expand/Collapse** button to collapse the currently displayed series data. When collapsed, only the totals for each series are displayed. Click the button again to expand the series and view data at the period level.

Once you are finished making any changes to the data, click the **Export to Excel** to save the currently displayed data as a spreadsheet file.

Demand Data

The Demand Data View enables you to perform customized calculations. Generally, these calculations are used to obtain the suggested times and quantities of re-orders, allowing you to develop an inventory replenishment schedule to meet your forecasted demand.

Note To customize this view, see [“Add or Remove Opinion Lines in a View” on page 90](#) for additional information.

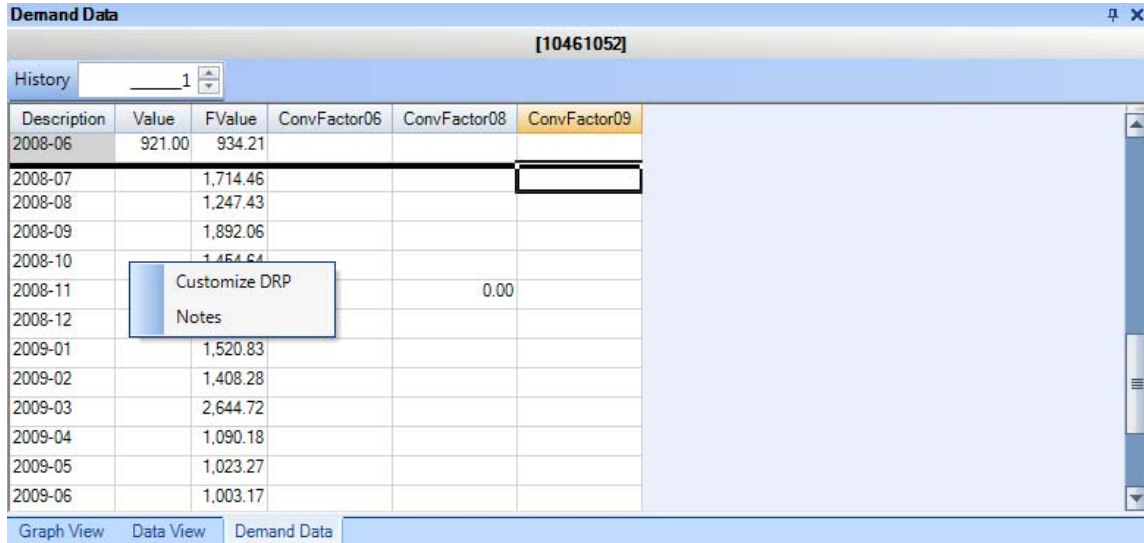
The screenshot shows the 'Demand Data' view window. The title bar indicates '[HOME][1688312C1]'. The window has a 'History' dropdown set to 6. The main table displays data for various periods from 2008-04 to 2009-04. The columns include Description, Base Fcst, Stat SS, Sml SS, End Inv Bgt, End Inv Cons Fcst, and End Inv Pr Cons Fcst. The data shows a clear trend of increasing inventory and forecast values over time.

Description	Base Fcst	Stat SS	Sml SS	End Inv Bgt	End Inv Cons Fcst	End Inv Pr Cons Fcst
2008-04	2,434		0			
2008-05	2,191		0			
2008-06	1,925		0			
2008-07	2,192		0	-2,574	4,556	4,676
2008-08	2,364		0	-5,148	2,194	2,508
2008-09	2,493		0	-7,723	6,537	7,067
2008-10	2,277		0	-10,298	4,196	4,804
2008-11	1,893		0	-12,873	2,085	2,611
2008-12	2,349		0	-15,448	6,546	7,220
2009-01	2,054		0	-18,023	11,036	11,721
2009-02	2,344		0	-20,597	8,597	9,670
2009-03	1,902		0	-23,172	6,461	7,534
2009-04	2,362		0	-25,747	10,784	11,857

At the bottom of the window are tabs for 'Graph View', 'Data View', 'Demand Data', and 'Statistics View'.

The Viewer enables you to customize the Demand Data View by adding Opinion Lines and specifying the order in which those lines display.

- 1 Click the **Demand Data** tab in the Viewer.
- 2 Right-click anywhere in the view and select **Customize DRP**.



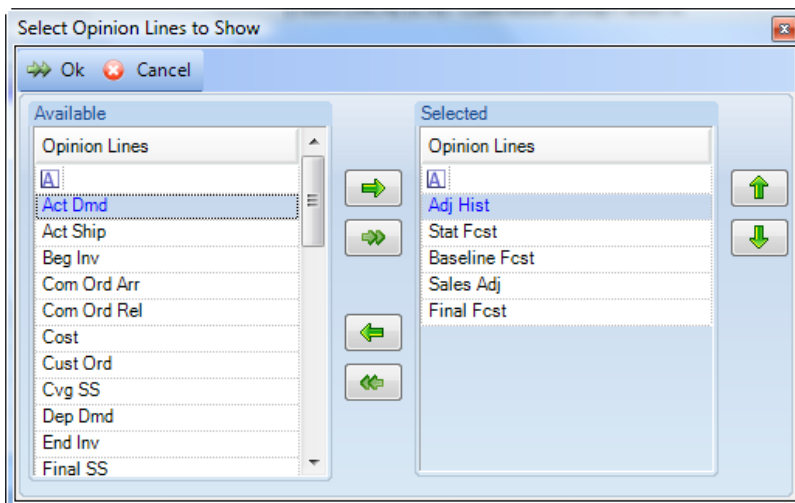
Demand Data [10461052]

History: 1

Description	Value	FValue	ConvFactor06	ConvFactor08	ConvFactor09
2008-06	921.00	934.21			
2008-07		1,714.46			
2008-08		1,247.43			
2008-09		1,892.06			
2008-10		1,454.64			
2008-11				0.00	
2008-12					
2009-01		1,520.83			
2009-02		1,408.28			
2009-03		2,644.72			
2009-04		1,090.18			
2009-05		1,023.27			
2009-06		1,003.17			

Graph View | Data View | Demand Data

The Select Opinion Lines to Show window displays.



- 3 Select the Opinion Lines to display from the **Available** list and use the arrow buttons to move them to the **Selected** list.
- 4 Use the **Up** and **Down** arrow buttons next to the Selected list to change the order in which these lines display.
- 5 Click **Ok**. Your selections now display in the Demand Data View.

Statistics View

The Statistics View allows you to view more detailed information regarding a forecast and select which statistics are displayed. You can also change how you view the statistics by grouping them together based on any column in the Statistics View.

Note Please note that after upgrading from older versions of the DME, your statistics view will not show any statistics until your forecast settings are executed from within the DME Viewer

- 1 In the Viewer, select the **Statistics View** tab at the bottom of the main window.
- 2 The Statistics View displays data relating to the statistics selected for this series.

Statistics View

Drag a column header here to group by that column.

Source	Target	Category	Statistic	Value
Base Fcst	End Inv Bgt			=
Base Fcst	End Inv Bgt	General	MAPE	0.0828
Base Fcst	End Inv Bgt	General	Mean	2,292.6096
Base Fcst	End Inv Bgt	General	R-Square	0.0000
Base Fcst	End Inv Bgt	General	Standard Deviation	224.1139

Graph View Data View Demand Data Statistics View

- 3 To view statistics for multiple forecasts within this series, clear your filter criteria from the top row of the table.

By default, the Statistics View filters the data it displays by matching the Source and Target fields to the selected Forecast Setting in the ForecastX Method pane. If you wish to see all the statistics for all the existing Forecast Settings you can click the icon to remove filters from any or all columns.

Grouping in the Statistics View

You can sort the Statistics View using any column by clicking on the title. Clicking the column title again will reverse the sort order.

Below the statistics is an area that says "Drag a column header here to group by the columns." This allows you to group your statistics by any column from the statistics view. You can drag additional columns to this area to further group and view your statistics.

Statistics View

Target				
Source	Category	Statistic	Value	
 Adj Dmd				
Target : Cons Fcst (4 items)				
Adj Dmd	General	MAPE	0.2180	
Adj Dmd	General	Mean	13,737.4167	
Adj Dmd	General	R-Square	0.0000	
Adj Dmd	General	Standard Deviation	3,080.4678	
Target : End Inv Cons Fcst (4 items)				
Adj Dmd	General	MAPE	0.2126	
Adj Dmd	General	Mean	13,737.4167	
Adj Dmd	General	R-Square	0.0000	
Adj Dmd	General	Standard Deviation	3,080.4678	
Target : Sales Fcst (4 items)				
Adj Dmd	General	MAPE	0.1172	
Adj Dmd	General	Mean	13,737.4167	
Adj Dmd	General	R-Square	0.3514	
Adj Dmd	General	Standard Deviation	3,080.4678	

Graph View

Data View

Demand Data

Statistics View

You can drag the statistics header back to the list view to remove this level of grouping and return the columns to the list view.

Advanced Statistics View

The Advanced Statistics View is used to display additional statistics for complex methods such as Event Model and Regression models.

Note The Advanced Statistics View will only be available when complex forecast methods such as Event Model, Multiple Regression, Polynomial regression, Erlang C, Census X-11, Trend Linear Regression or Stepwise are used and a forecast has been successfully run.

Advanced Statistics View

Opinion Lines

Base Fcst-Multip

Statistics

Anova

Export to Excel File

Anova

Source of variation	SS	df	MS	SEE
Regression	0.00	1.00	0.00	
Error	0.00	22.00	0.00	0.00
Total	0.00	23.00		

Coefficient

Series Description	Included in model	Coefficient	Standard error	T-test	P-value	F-test	Elasticity	Overall F-test
[GARDEN] [1831487C93]	Dependent	0.00	0.00	1,000,000,000,000.00	0.00			1,000,000,000,000.00
End Inv Pr Cons Fcst	No							
Adj Dmd	Yes	0.00	0.00	1,000,000,000,000.00	0.00		1,000,000,000,000.00	

Graph View

Data View

Demand Data

Statistics View

Advanced Statistics View

At the top of this window the following fields and buttons will display:

- **Opinion Lines** - This field will display the opinion line name that holds the forecast and the method used.
- **Statistics** - This drop-down displays all the available statistics for the selected opinion line.
- **Export to Excel File** - Click this button to export this data as an Excel file containing all the current selected statistics.

Misc Window

The Misc Window consists of three different tabs:

- Adjustment
- Same As
- ForecastX Methods

Adjustment Tab

You can adjust the data in any Opinion Line by using the **Adjustment** tab. This tab enables you to change the data of the appropriate observation(s).

- 1 In the **Misc Window**, click the **Adjustment** tab.

- 2 Use the **Date Range** drop-downs to specify the date range for this Opinion Line.

Table 2.6

Date Range	Description
From	The first period on the graph for the change to take effect.
To	The last period on the graph for the change to take effect.

- 3 In the **Adjustment** fields, select which Opinion Line you want to edit using the drop-down list. The following table details each adjustment option:

Table 2.7

Adjustment	Description
By Percentage	Increases or decreases the data by the specified percentage. Use a positive percentage to increase the values and a negative percentage to decrease the values.
By Amount	The specific amount by which to increase or decrease the data. Use a positive percentage to increase the values and a negative percentage to decrease the values.
To Exact Value	Changes the data to a specific value.
New Product	Use this option to introduce or retire a product in the forecast. Indicate whether the product is new or should be retired.
Delete	Used to delete the data selected in the Data Range.

Table 2.7

Adjustment	Description
Range Total	Used to allocate a total within the Date Range fields. DME totals the values in the data range, and then allocates the new volumes based on already established seasonality/patterns, determines the percentage that each value represents of the total, and changes the values by that percentage.

- 4 If you selected “New Product”, the New Product fields display.

The screenshot shows a 'Misc Window' dialog box with the 'Adjustment' tab selected. It has three sub-tabs: 'Adjustment', 'Same As', and 'ForecastX Methods'. Under 'Adjustment', there are 'Date Range' fields (From: 2008-07, To: 2009-12) and a 'Keep Range' checkbox. To the right, there's an 'Adjustment' dropdown set to 'Base Fcst' with a value of 0.00. Below that, a 'New Product' dropdown is selected. An 'Apply' button is to the right. At the bottom, the 'New Product' section has a 'Curve Type' dropdown set to 'Linear', a 'Direction' dropdown set to 'Introductio', and 'Min' (1,690.33) and 'Max' (2,492.70) value fields.

- 5 In the **New Product** area, provide additional information to detail the forecast. The following table details these options.

Table 2.8

Options	Description
Curve Type	Specify the curve type for the new or retired product. • Linear: Linear line used to specify start and end points. • S-Curve: S-shaped pattern used to specify start and end points. • Logarithm: Logarithm curve used to specify start and end points. • Exponential: Exponential curve used to specify start and end points.
Direction	Indicate whether you are introducing or retiring a product. Introduction will cause the curve direction to rise. Retirement causes the curve to fall.
Min/Max	Enter the minimum and maximum values for the selected curve type and direction.

- 6 Click **Apply**.

You can also make the same changes on a graph manually:

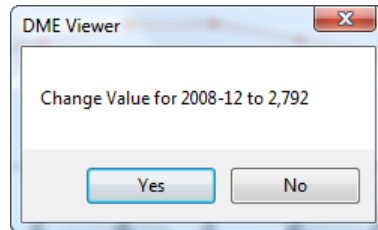
- 1 Right-click on the point on the line where you want the change to begin and select “From”.
- 2 Right-click on the point of the same line where you want the change to end and select “To”.
- 3 On the Adjustment tab, select the *type of adjustment* from the **Adjustment** drop-down list and click **Apply**.

DME applies the specified changes to the graph. Alternatively, click and drag your cursor over the line you want to move.

A dot displays on the line indicating an adjustment has been made.

Note To accurately differentiate which line the cursor is on, the dot displays as a different color when it is over each different type of line.

- 4 Hold down your left mouse button and move the line to the new point on the graph.
A confirmation message displays and asks you to confirm the change.



- 5 Click **Yes** to confirm that you want to make the change.
- 6 To remove the change you made via manual change or the Misc window, select **Undo** on the **Home > Edit** menu.

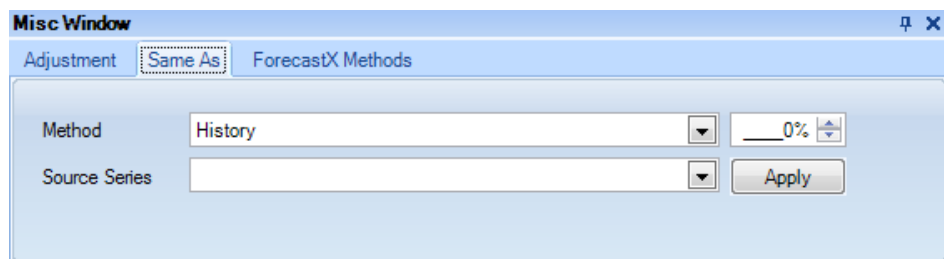
Note Changes can be undone or rolled back to their original status as long as the user has not saved, clicked away from the current series, or changed to another View.

Same As Tab

The Same As tab allows you to change a series' forecast to resemble the forecast of another series. This is done by looking at the source series' History, Seasonality, or both.

- If a scenario has a static hierarchy applied and the “On-fly rebalance” option was enabled in the Hierarchy definition, changing the forecast with the Same As feature will trigger a rebalance.

- 1 In the Misc Window, click on the **Same As** tab.



- 2 In the **Method** drop-down, select either “History
- 3 y”, “Seasonality”, or “Both”. Enter a percentage in the field to the right.
- 4 In the **Source Series** drop-down, select a series from the list.
- 5 Click **Apply**.

ForecastX Methods Tab

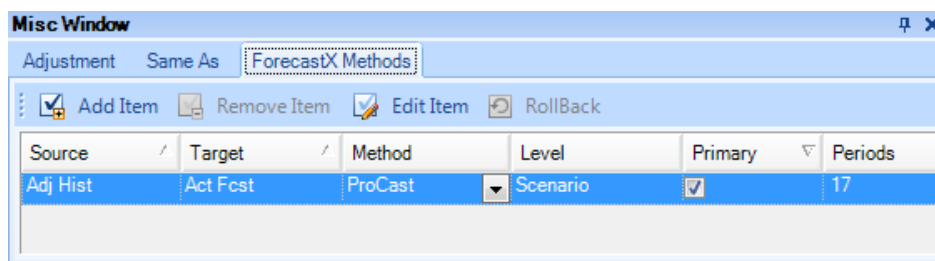
On the ForecastX Methods tab, the DME provides the ability to configure and run multiple forecast configurations. These configurations can be set for all series in a scenario or they can be customized for each series or a group of series. Each one of these configurations is known as a Forecast Setting. The ForecastX Method tab gives you the ability edit existing forecast settings or add new ones.

You can also run all forecast settings for a Series or even multiple Series by selecting them in the Multi Series View panel at the left, right-clicking, and selecting “Run ForecastX for Selected Series”. This will re-run all forecasts within these series.

Additionally, forecasts can be run from the **Home** tab using the **Reforecast** button. To run only selected forecasts from multiple series, you must select them in the Multi Series View and then selecting **Reforecast** on the **Forecast** menu to select which forecasts you want to run.

Note Source and target opinion lines must be displayed in a View to be displayed and used in the Misc Window ForecastX Methods tab.

Depending on the permissions of your user account, you might not have access to all of the features on this tab.



The following fields display on the ForecastX Methods tab:

Table 2.9

Column	Description
Source	This column indicates the Source opinion line for each forecast setting. The opinion line configured here will be the historical data used to generate the forecast.
Target	This column indicates what the Target opinion line is for each forecast setting. The opinion line configured here will be where the forecast data is stored after generating a forecast.
Method	This column will display the forecast method selected for this particular forecast Source and Target.
Level	This column indicates if a forecast setting is set for all series in a scenario or if it is customized for the individual series. There are two possible options: • Scenario - Indicates that this forecast setting is shared will all the other series in the scenario; the configuration for this forecast setting will be the same for all series. • Series - Indicates that this forecast setting has been customized for a particular series. The configuration for this forecast setting could change from series to series which could affect the resulting forecast.

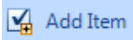
Table 2.9

Column	Description
Primary	This setting will show you if the forecast line is the Primary forecast setting for the scenario. The Primary forecast setting is specified when the scenario is created and configured in the Admin Tool. This setting will always have the Value line as the source and the FValue line as the target. This forecast setting cannot be deleted.
Periods	This column displays the number of forecast periods the forecast setting will populate.

Add a Forecast Setting

In order to add a new forecast setting you must make sure you have the source and target opinion lines included in the Data View or Demand Data View.

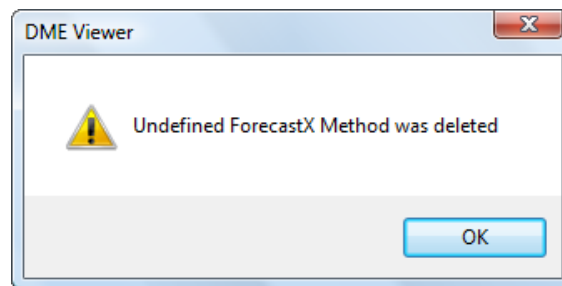
- 1 In the **Misc Window** on the **ForecastX Method** tab, select **Add Item** to create a new Forecast Setting profile.

- 2 Click the  button.

A new forecast setting will display on the ForecastX Method tab with no **Source**, **Target**, or **Method** selected. Select the desired opinion lines and method from the drop-down boxes.

Note You must select **Source** and **Target** opinion lines prior to saving because these two fields cannot be changed once the setting has been saved.

If you move off of this series or switch to other functionality without populating these fields, you will be warned that the new setting was deleted.



Note When a new forecast setting is created, it will stay at the Scenario Level unless it is customized by a user. After the forecast setting is modified it will change to Series Level.

Remove a Forecast Setting

To remove a forecast setting, select the forecast from the ForecastX Methods tab and click the **Remove Item** button.

Please note that the Primary forecast cannot be removed. The Primary forecast is indicated by the selected check box in the Primary column. The Primary forecast setting is specified when the scenario is created and always has the Value line as the source and the FValue line as the target.

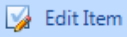
Note Only Scenario level forecast settings can be removed. If a forecast setting has been customized and is displayed as a Series Level forecast setting, then it must be rolled back before it can be removed. See [Rollback a Forecast Setting](#) for more information.

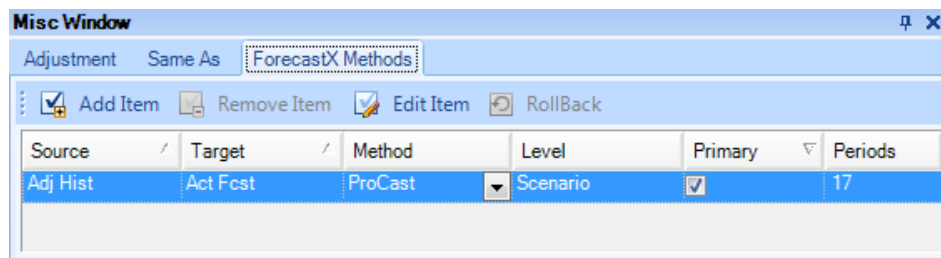
Note When you remove a forecast setting from any series in a scenario, it will be removed from all series in the scenario.

Edit a Forecast Setting

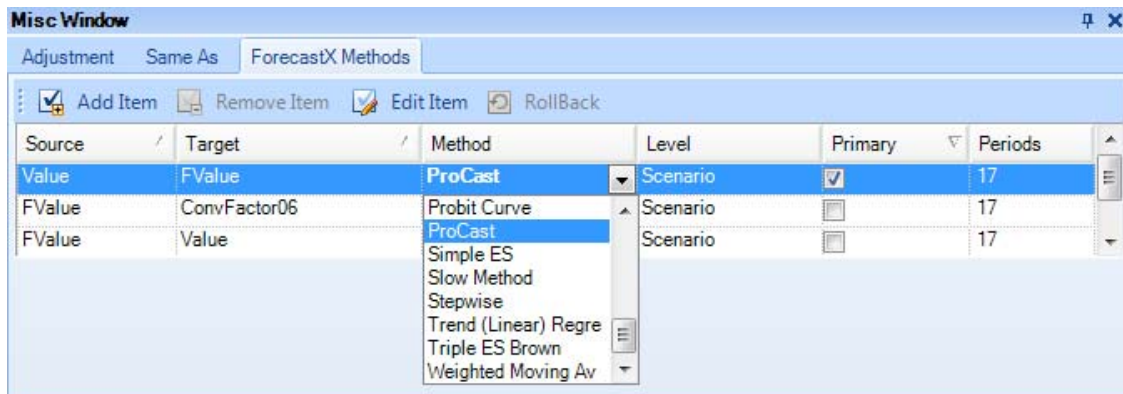
Additional configuration to the initial Forecast Setting can be made through the **Edit Item** option. Making changes to these forecasts will change the Level to “Series” indicating that it is specific to the selected series.

Note You cannot make changes to the Source or Target opinion lines of a Series Level forecast setting.

- 1 On the ForecastX Methods tab, select the forecast you want to modify and click the  button



- 2 Use the Method drop-down to select a new method. This is the quickest way to edit a forecast setting. Some forecast methods, such as Procast, do not require further configuration.



- 3 The DME provides you with the ability to edit any of the parameters supplied to the forecast method or to configure complex methods such as Event Model or Multiple regression. To edit a forecast setting, either double-click on the forecast to edit or select the forecast and click the **Edit Item** button:
- 4 Edit any of settings as necessary. For more information on each of the sections see the **Forecast Settings** section below.

Forecast Settings

The **Forecast Settings** window is used to edit the configurations available for each of your Forecasts.

Note For more information on General, Safety Stock, Confidence Limits, Accuracy, Descriptive, and Regression Table Statistics, please refer to [Chapter 14 - Section 5 of the DME Administration Guide](#).

Select one or more series in the Multi Series View before selecting **Edit Item** to apply changes to all selected series at once.

Forecast Settings

This section contains general settings for the current Forecast configuration:

Table 2.10

Field	Description
Source Opinion Line	This is the opinion line from which the history will be used to create the forecast. This opinion line is a read only setting and cannot be changed in this window. You must select the Source opinion line on the ForecastX Method tab when creating the Forecast setting profile

Table 2.10

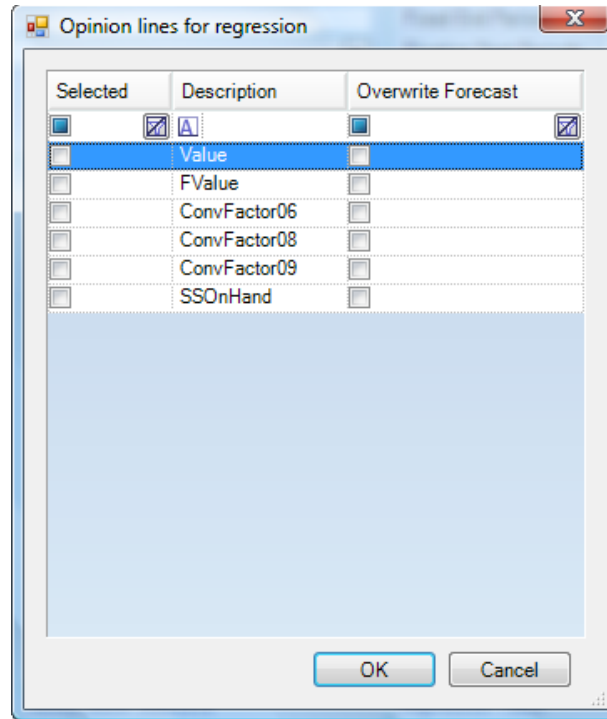
Field	Description
Target Opinion Line	This is the opinion line where the resulting forecast will be saved. Any existing data in the Opinion line will be overwritten. This opinion line is a read only setting and cannot be changed in this window. You must select the Target opinion line on the ForecastX Method tab when creating the Forecast setting profile.
Forecast Method	This field is used to select the Forecast Method you want to use to create your statistical forecast. The method selected here will determine the fields that display in the ForecastX Method Parameter section.
Overwrite History	This setting specifies if historical periods can be overwritten when running the forecast.
Automatic Forecast	This setting is used to specify whether the current forecast setting should be executed when the scenario level forecast is executed. When running a series level forecast this setting is ignored. However, if a forecast for the entire scenario is specified and a particular Forecast Setting has this flag disabled, then it will not be executed and the forecast is not produced.

ForecastX Method Parameters

This section contains the specific parameters that can be configured for each Forecast Method. The parameters available in this section vary based on the Forecast Method selected in the Forecast Settings section.

For more information on each parameter of a particular Forecast Method please see [Chapter 14 - Section 5 of the DME Administration Guide](#).

For complex Forecast Methods such as Census X-11, Event Model, Multiple Regression, Polynomial Regression and Stepwise, additional lines of data may be required for independent variables or event flags. You can select your independent variables or Event Flags directly from other opinion lines. For example, for Event Model you can set your event flags by clicking the  icon in the Opinion Lines field and selecting your opinion lines:



History Range

This section contains information regarding how many historical periods will be used to generate the resulting forecast.

Table 2.11

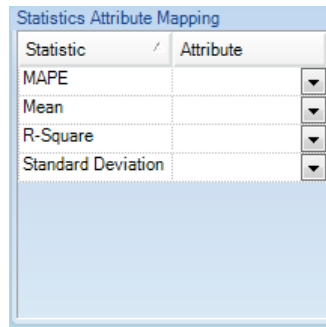
Field	Description
Fixed Periods	Creates a forecast setting that uses the periods specified in the Fixed Start Period and Fixed End Period fields. For example 2008-01 through 2009-12.
Floating Periods	Allows you to configure a forecast setting that will always use a set number of historical periods. For example, if your series has 36 months of history, you can use the last 24 months for a forecast setting by setting the Floating Start Period to 12 and the Floating End Period to 36.

Forecast Range

This section is used to specify how many **Forecast Periods** will be calculated when the forecast is run. This value cannot exceed the number of existing forecast periods for the current series.

Statistics Attribute Mapping

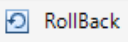
Each forecast you run will generate the statistics you have selected for it viewable in the Statistics view. Any statistics selected for the primary method in FValue display in the Series Information for this method, such as MAPE, Mean, or Standard Deviation. However, you can save other statistics into series properties for the primary method, there are no default attributes mapped to these statistics, so you must use the drop-down lists to assign an attribute for each statistic.



Rollback a Forecast Setting

When Forecast Settings are created they are set at the “Scenario” Level, which indicates that the forecast setting has not been customized. Once the forecast setting is customized, it will be displayed as a “Series” Level forecast indicating that it is specific to an individual series.

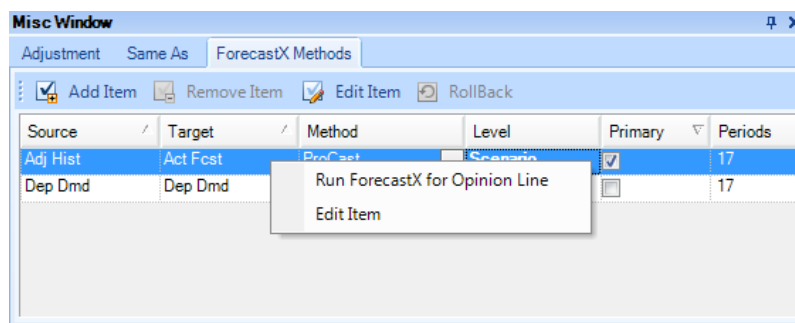
For a Series Level Forecast Setting you can reset all customizations back to the Scenario Level by using the RollBack feature.

- 1 Select the Forecast Setting and click the  RollBack button to restore the original forecast setting configuration and make the selected forecast setting a Scenario Level. This change will only affect the selected series.

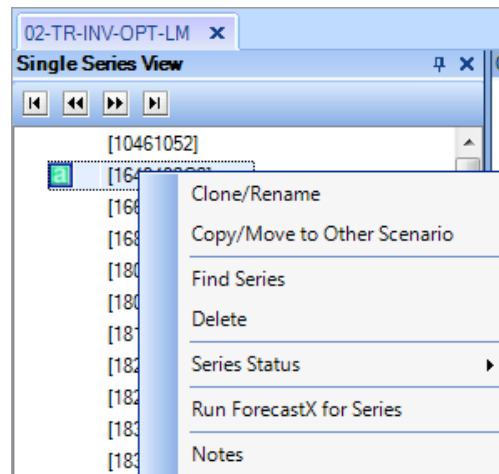
Running a Forecast Setting

After you have configured your forecast settings, you can run them from multiple places in DME.

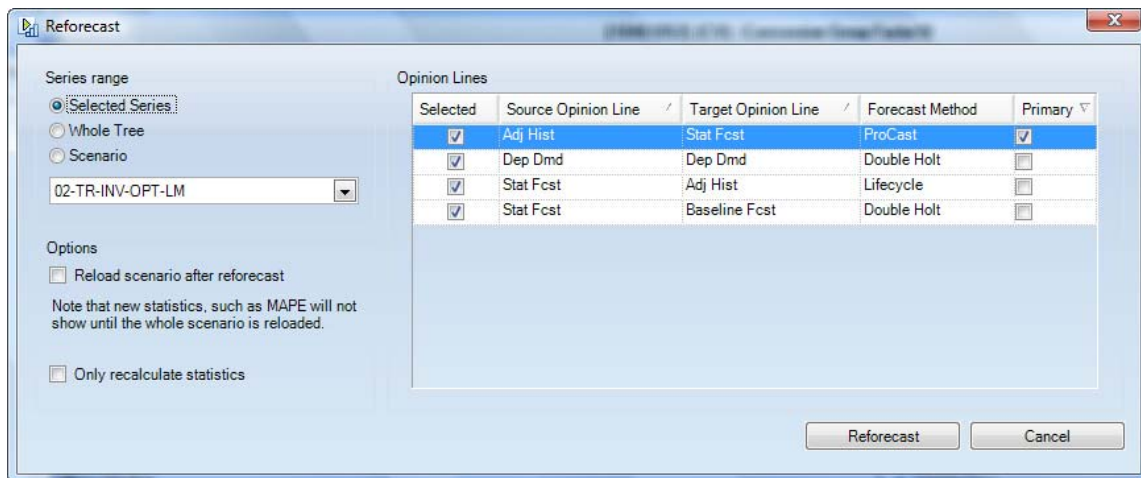
If you right-click on any row in the ForecastX Method tab you will be able to run the selected forecast setting by selecting “Run ForecastX for Opinion Line”. This method will run only the selected forecast for the selected series and opinion line:



You can also run all existing forecast settings for one or more series by selecting them in the Single Series or Multi Series View, right-clicking, and selecting “Run ForecastX for Selected Series”.



Finally, you can run select forecast settings for one or more series by selecting them on the Single Series of Multi Series View and clicking **Reforecast** on the **Forecast** menu. On the Reforecast screen you will be able to select which forecast settings to run by checking the desired profiles from the **Selected** column.



Running a Forecast Using an Original

For the Primary statistical forecast stored in FValue, manual adjustments are made to the opinion line.

Demand Information

The Demand Information displays on the right-side of the Viewer screen by default. This section contains series attributes that are generally used for DRP calculations or Safety Stock.

The Safety Stock section will only display if the Safety Stock option properties have been activated in the Admin Tool for this scenario. See the **Administration Guide** for more details.

The screenshot shows a window titled "Demand Information" with a toolbar at the top. It contains two main sections: "Demand Data" and "Safety Stock".

Demand Data	
InitBackLog	0.00
InitOnHand	7,502.00
LeadTime	58
MaxOrder	21,361.00
MinOrder	13,859.00
OrderMultiple	21,361.00
RollSales	True

Safety Stock	
Include Fcst Values	False
ServiceLevel 50--	90.00
SSLeadTime	0.00

Below these sections is a label "Include Fcst Values" followed by a text field containing "Include Fcst Values". At the bottom left is a "Reset" button.

Unless other values are specified in the Data Demand window, the following default values are used for the custom calculations.

Table 2.12

Textbox	Default Value
Lead Time	Same as the Safety Stock calculation - 2
Maximum Order	1000
Minimum Order	1000
On Hand	200
Order Frequency	0
Order Multiple	100
Include Forecast Values	False

Series Information

The Series Information pane displays series attributes for the data in rows and fields that were mapped (i.e., price, cost, customer) using the Series Properties. If your source data is in columns, you cannot import data to these fields; however, you can still make changes.

The Series Information window contains a group of drop-down lists that enable you to change various data values. To make changes in the Series Properties, simply click on a field and enter the new value.

These fields can be renamed and displayed according to customer requirements. See [“Custom Tasks Management” on page 80](#) for additional information.

The following table describes each group of statistics in this section:

Table 2.13

Feature	Description
Customer	Holds series attributes for customer information.
General	Holds the series attributes of general information about the item, as well as customizable text and numeric fields.
Item Link	Holds series attributes used to link data for different processes.
Line	Holds series attributes regarding the item itself.
Metric	Holds series attributes regarding metrics and other parameters.
Product	Holds product attributes.
Statistics	Contains statistics calculated for each different series. These values are always Read-Only.

Series Status

The series flags in the Status drop-down list enable you to identify particular records that should not be included in the next forecast or are ready to be exported to a report or another system. The table below details the available flag options.

You can change a series status by using these buttons on the **Forecast** section on the **Home** tab in the ribbon.

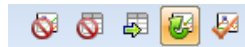


Table 2.14

Option	Description
Do Not Forecast	Use this option to exclude the series from the forecast calculation. If selected, this series will not be included in future forecast runs.
	If grouping is active with the Before Forecast option selected, or if Regression is the selected forecast method, this option is not available.

Table 2.14

Option	Description
Do Not Report 	Select this option to exclude this series from any generated reports.
Ready to Export 	Use this option to indicate that there will be no more changes made to the series and it is ready to be exported to another destination.
Roll Unsupported Forecast 	Used with DRP. This flag toggles the “Roll Sales” option. It is used in the DRP process to include any unsupported forecast in the next period’s recommended orders. For additional information, please refer to the Inventory Management User Guide.
Forecast Complete 	Use this option to indicate that the forecast for this series is complete. It will not be included in any further forecast calculations. The “Do Not Forecast” flag is automatically selected if the “Forecast Complete” flag is activated. Note: Series marked “Forecast Complete” will not receive allocation in Hierarchy rebalancing.

New Series

The New Series feature is used to add a new series to your data. The following configurations need to be set for this feature to work properly:

- The Scenario must have a Display Set applied to it.
- The applied Display Set must have at least one Series Attribute configured in the Label column. This new Label column is used to determine which series attributes are used to form the Description fields for your series and in which order they are displayed.

Note The New series feature is disabled when a scenario has a hierarchy applied.

- 1 On the **Home** tab in the ribbon, go into the **Edit** section, click the **Series** button and choose the **New** option

The **New Series** window displays.

New series

☒ Check Unique Create Cancel

Fields

Alias	Value
Customer	
Loc	
SKU Name	
Sku	
Sales Rep	
Fcst Lvl	

New series options

Copy Obs.	CopyFromSeries	
Value		
Historical Periods	1	
Copy Series Forecasting	☐	

- 2 Provide information to define a new unique series. You can populate the dropdown list with values from all the other existing series by clicking the “...” button.
- 3 Click the **Check Unique** button to confirm that the series is not a duplicate.
- 4 Select which observations will be used for the new series to be created. There are two options:

Table 2.15

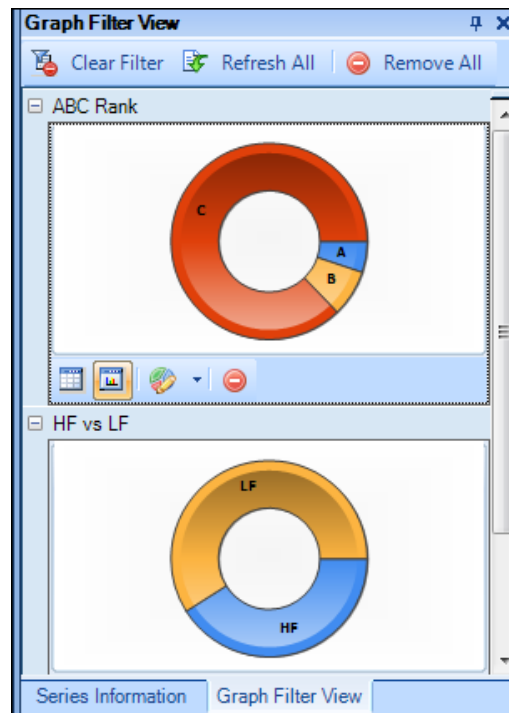
Observation	Description
Copy Obs from Series	You can select another existing series from the scenario and the system will copy the observations from the existing series to the new one.
Historical Periods	The observations in the new series are set to zero. You will need to provide the number of historical periods you want to create for the new series.

- 5 Click **Create**.

Graph Filter View

The **Graph Filter View** panel displays on the right-side of the Viewer screen. Users can choose whether or not this panel is displayed by selecting the corresponding button on the **Views** tab in the **Show/Hide** section.

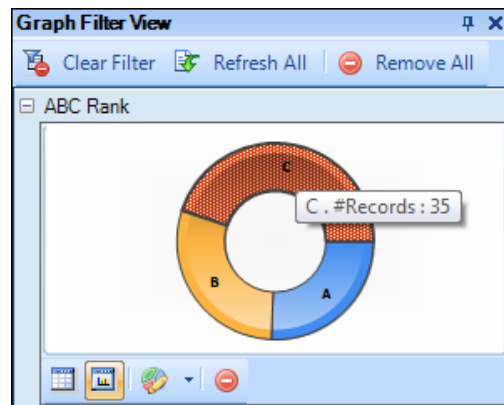
The **Graph Filter View** allows users to create charts that can be used to filter the graphs based on specific attributes, such as ABC or Product Family. These charts also present the user with an analysis of their data by showing the breakdown of series containing each of these individual attributes.



To add attributes to the Graph Filter View, go to the Series Information panel and right-click on the attribute you want to assign. From the right-click menu, select “Add to Graph Filter” and the selected attribute is added.

Series Information	
Inv DT	5/31/2009
Type Demand	F
Type Repl	M
Type SS	C
Metric	
ABC Rank	C
Product	
* DRP End DT	
* DRP Start DT	
Class	GARDEN
Family	GLOVE
Group	
Item Description	MINI GLOVE 101
Type	CONTRACT
Statistics	
MAPE	0.00 %
Mean	0.00
RSqr	0.00 %
Std	0.00
Group	
Group	

Once the attributes are displayed in the Graph Filter View, you can use the graph to see the breakdown of the current series by attribute. Place the cursor over any segment of the graph and a tooltip will display indicating the number of records containing that attribute.



Users can also view the attribute data in table format by selecting the Grid button in the lower left corner of the graph.

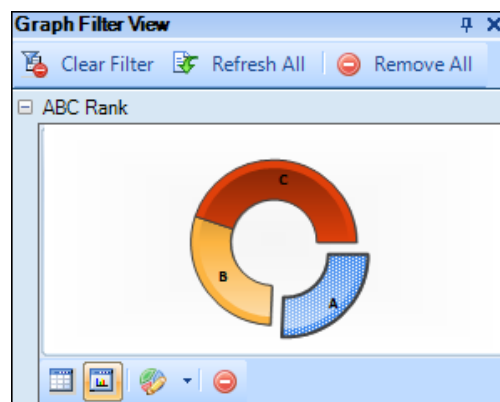
The image shows the same 'Graph Filter View' window, but the donut chart is replaced by a table. The table has two columns: 'Value' and 'Count'. The data is as follows:

Value	Count
A	20
B	23
C	35

The 'Grid' button in the bottom toolbar is highlighted with a red box.

Click the link in the **Count** column will filter the data in the Graph View to only display records containing the selected attribute.

You can also filter the current series data by clicking on any segment of the graph. The data in the Graph View is refreshed to only display records containing the selected attribute.

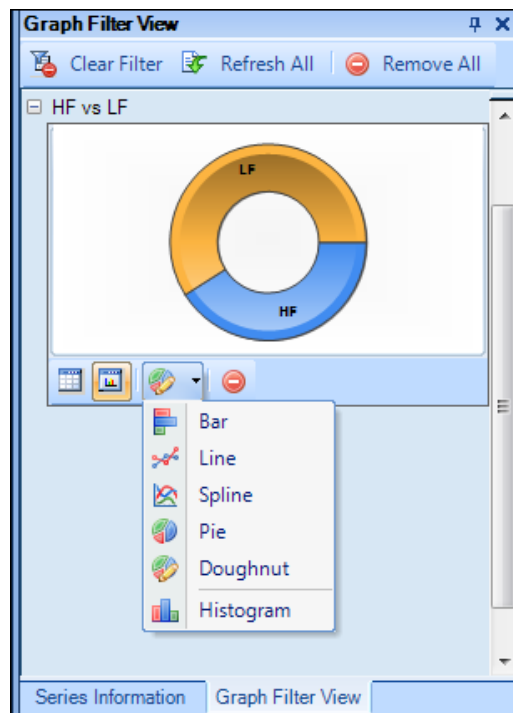


The Series View will also be filtered to only display series containing the selected attribute.

Click the **Clear Filter** button to remove the current filter from the Graph View. The **Refresh All** button will refresh all currently applied graph filters to update them based on any changes made to the current data.

Click the **Remove All** button to remove all the current Graph filters from the view. Click the **Remove** button below any individual graph to remove it from the view.

The Graph Filter View also allows you to change the type of graph used to display the attributes in each filter. Use the Graph Type drop-down at the bottom of the window to select a different graph type and the graph filter is updated automatically.



Notes View

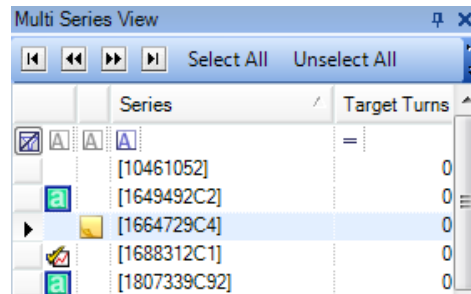
DME allows you to add customized notes to a specific series at either the Series Level or the Observation Level. Notes can be entered at a hierarchy level and are retained in the Notes Editor after the hierarchy is removed at the lowest series level and for the specific hierarchy parent level entered.

There are two types of notes:

- **Series Level** - This is a note that applies to a whole item.
- **Observation Level** - Notes that apply to an item in a particular period and opinion line, such as a note for SKU 123 for May 2008 for the promo adjust opinion line

The presence of existing notes are indicated in several views including indicators on Data and Graph Views, user created views, and the Multi Series View.

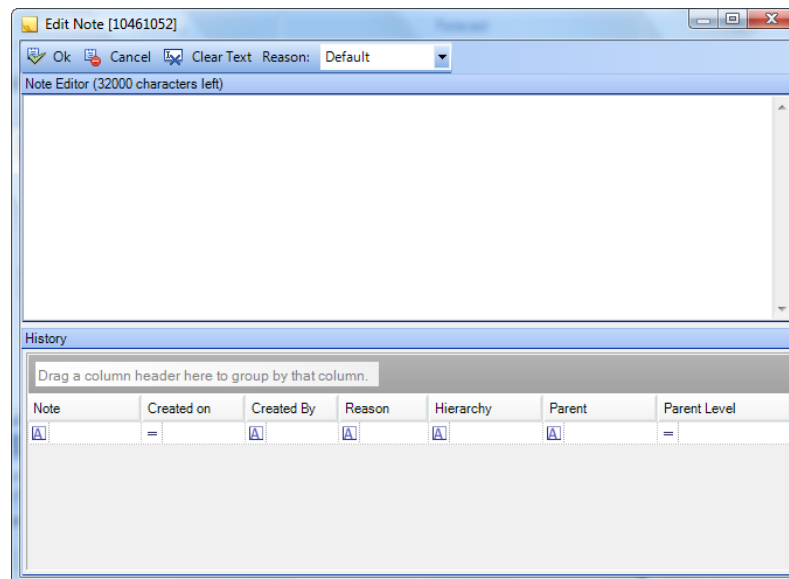
The Multi Series View panel displays an icon next to any series containing a note. This allows you to see which series contain notes and makes it easier to find specific notes within your scenario.



The Notes View and the data grids (Data View and user created views) are synchronized so that when an observation is selected in the grid, the Notes View will display any existing notes for the selected observation.

The Notes selection for viewing and entry are available in most views including the Notes View; as well as the Data View, Graph View, user created views, the Summary View, and the Multi Series View.

You can view an existing note by double-clicking on the note in the Notes View to open the **Edit Note** screen. Double-click on the Note in the History panel to read the full contents.



For Series and Observation Level notes, the Edit Note window shows the history of any note entered for this series, such as the creation date and the user id that created the note. For Observation Level notes, there is no History panel and all notes are entered and stored in the same window. You can filter on the column headings just like you would in the Multi-Series View.

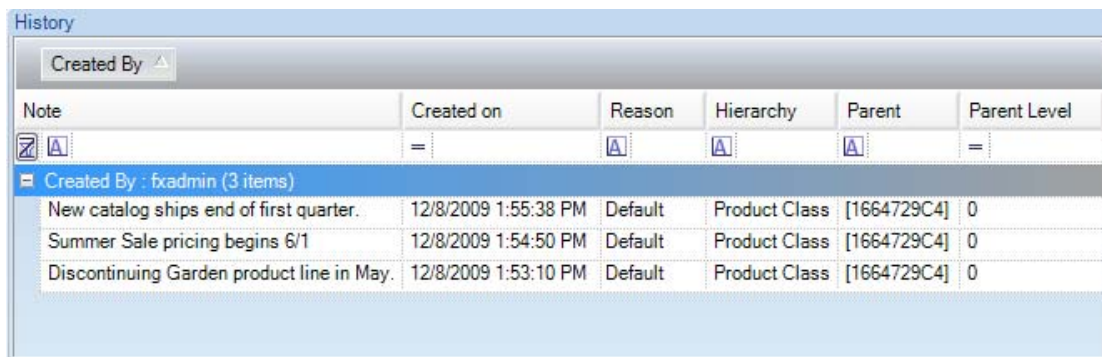
The following table shows the columns that are available in this view:

Table 2.16

Column	Description
Period	For Observation level notes only. Indicates the period for which the note was entered.
Observation Line	For Observation level notes only. Indicates the opinion line for which the note was entered.
Note	This field contains the note that was entered.
Created on	The date and time the note was added.
Created By	The user account where the note was created.
Reason	The reason code that was assigned to the note when it was created.
Hierarchy	Indicates the name of the hierarchy applied to the scenario where the note was entered. This field is blank for series in the lowest level of detail or if the scenario does not have a hierarchy applied.
Parent	Notes added at the Series Level are copied down and saved to lower levels. This field shows the series description of the higher level series to which the note was added before being copied down. If this field matches the description of the current series, this means the note was added at this level.
Parent Level	This field shows the hierarchy level of the parent series where this note was added and then copied down to this level. If this field is "0", it means the note was added at the lowest level (detail level). If this field is "2", it was added two levels above the detail level in the hierarchy.
Last Update	Indicates the date of the last modification/edit to a note.

The History panel also allows you to sort the notes by any column or enter filter criteria to limit the number of notes displayed. For example, you could click the **Created On** column to sort by the date the note was entered or select a name from the **Created By** drop-down to only view notes created by that person.

You will also notice an area that says "Drag a column header here to group by that column." This allows you to group your notes by any column of the history view. You can drag additional columns to this area to further group and sort your notes.



You can drag the notes column boxes back to the list view to remove this level of grouping and restore the column to the list view.

Add a Series Level Note

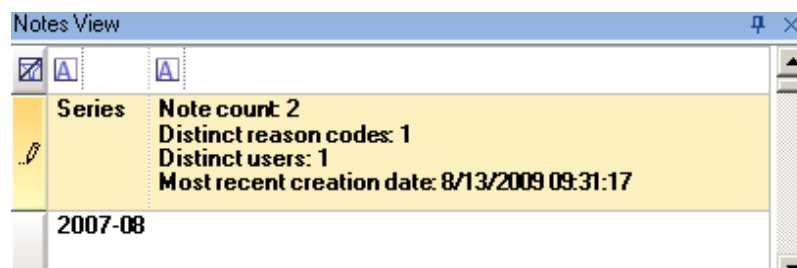
Inserting a note at the Series Level allows you to apply this note across the series. Notes entered in a hierarchy at this level are disseminated to the lowest level of the series, but not to the levels in between. These notes are saved as part of the hierarchy and will be stored even if the hierarchy is removed.

Note If changes are made to the Series Attributes or Hierarchy, notes entered at the aggregate level will only be available in the Notes Editor. However, notes at the lower levels will remain and display the original series attributes.

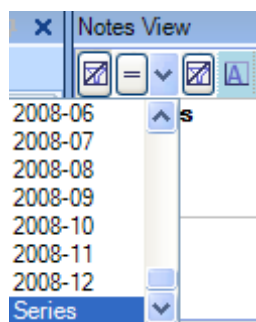
The Series field is located at the top of the Notes View, above the individual Observation Levels. At the lowest level the most recent note will display. If a hierarchy is applied, the Series field in the Notes view will display the following statistics:

Table 2.17

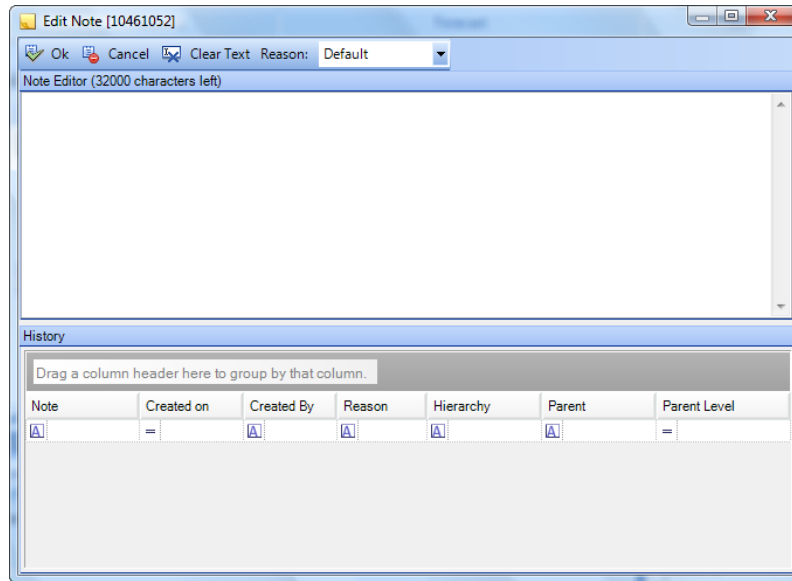
Statistic	Description
Note count	Displays the number of distinct notes for all the notes entered in all the series below the selected series.
Distinct reason codes	Total number of distinct reason codes used for all notes entered in all the series below the selected series.
Distinct users	Shows the number of distinct users who have entered notes in all the series below the selected series.
Most recent creation date	Shows the time and date when the last note was entered.



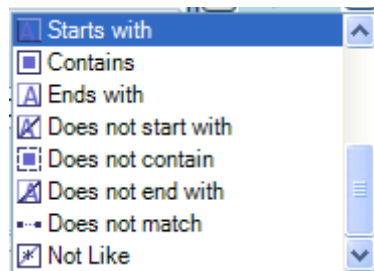
- 1 In the Notes View window, click on the  button, scroll down the list and select “Series”.



- 2 Double-click on the series textbox to open the **Edit Note** window.



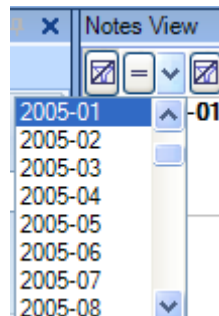
- 3 Enter the body of the note in the **Note Editor** window.
- 4 Select the **Reason** for this note from the drop-down list. Reason codes are customizable and can be set to any value you wish.
- 5 Click **Ok** to save this note and exit the Edit Note window.
- 6 A note icon will now display next to the selected series.
- 7 Click on the  button to display the dropdown list and select one of the options, if necessary.



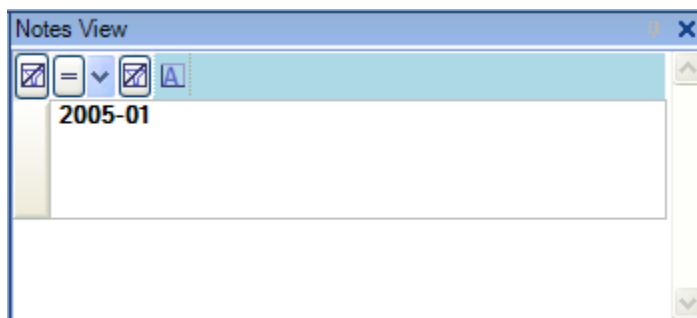
- 8 Click on the  button to apply or remove the filter.

Insert a Note at Observation Level

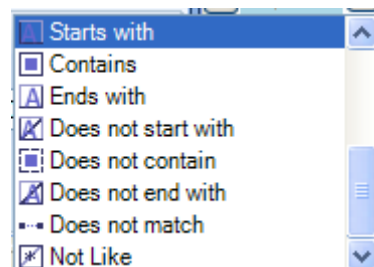
- 1 In the Notes View window, click on the  button and scroll down the list and select one of the dates.



- 2 Enter a *note for this period* of the series.



- 3 Click on the  button to display the drop-down list and select one of the options, if necessary.



- 4 Click on the  button to apply or remove the filter.

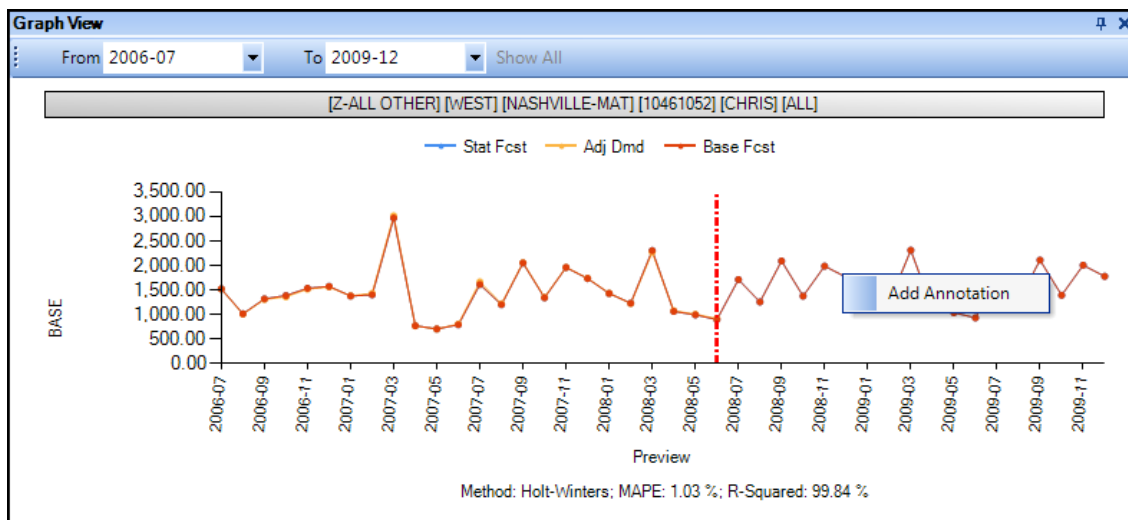
Insert a Note at the Observation Level in Graph View

You can add notes to the first Opinion Line that is displayed in the Graph View by right-clicking on an observation.

To add a new note in the Graph View, right-click on the period to which you want to add the observation and select “Add Annotation”.

In order to get the “Add Annotation” menu option, you need to right-click on the first opinion line in the list of opinion lines shown (see [6-1: Graph View Options](#)) to check the list of opinion lines.

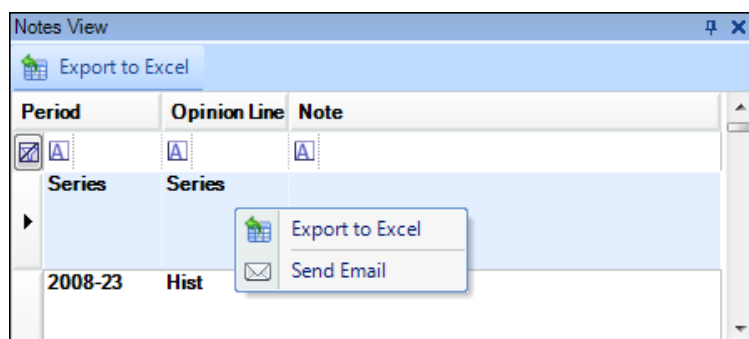
The only case in which the first opinion line in the list is not used is when the first opinion line in the list is ConfInterval. If this opinion line is selected as the first one, the notes can be added by right-clicking on the second opinion line in the list.



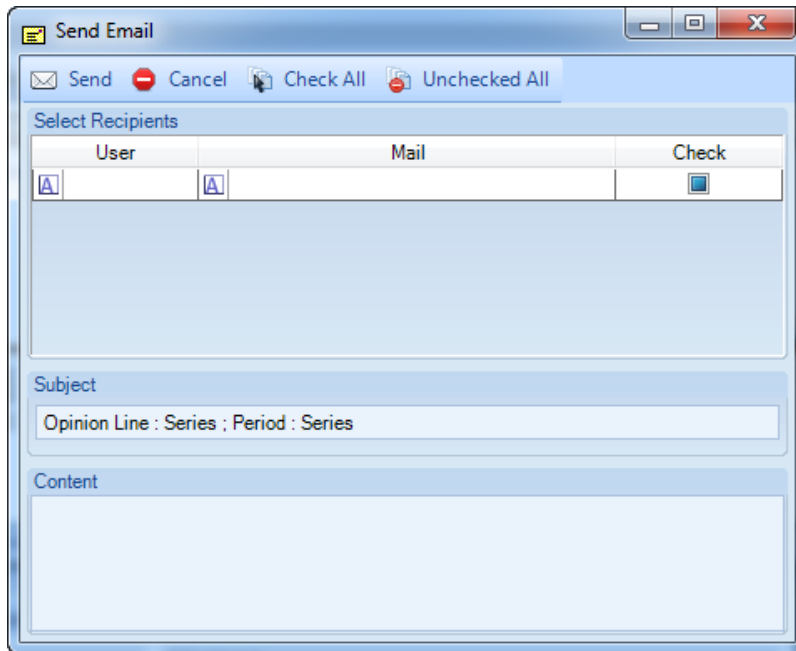
Send Notes to DME User

To enable other users to track notes over a series, you can send the note directly from the Viewer using the DME Email Service.

- 1 Right-click on any Notes period and select **Send Item Notes**



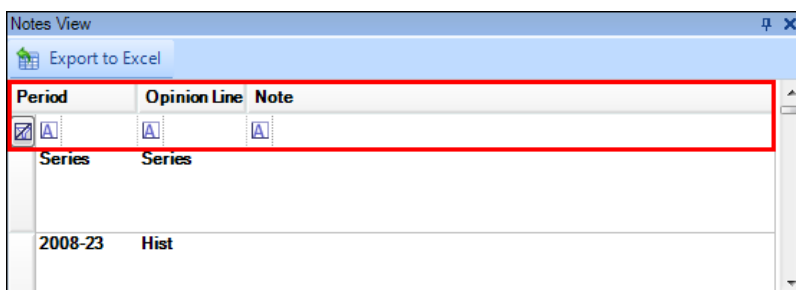
The **Send Email** window displays:



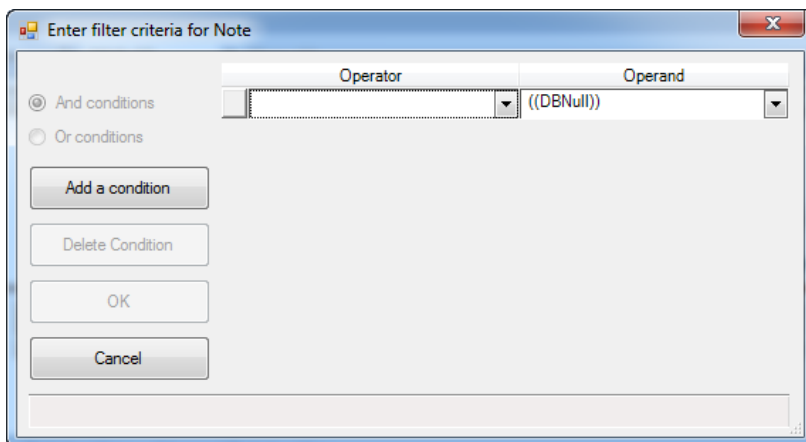
- 2 Select the *users* you want to send the email to in the **Select Recipients** textbox.
The Viewer automatically populates the textbox with the series information in the **Subject** textbox. In the **Content** textbox, the Viewer automatically populates the textbox with the note information in that series.
- 3 You can edit the **Email Subject** and **Content**, if necessary.
- 4 Click **Send**.
Note Email notification must be configured to use this function.

Filtering Notes

You can filter notes by clicking on any of the three drop-down at the top of the Notes View panel. These filters allow you to filter by Period, Opinion Line, or by the contents of the notes.



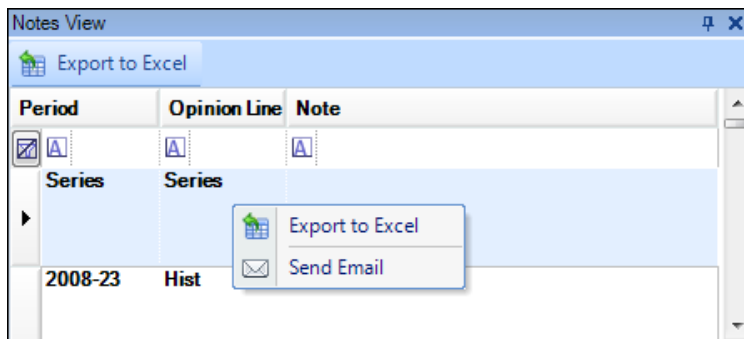
To use the Note filter, select the “Custom” option to open the “Enter filter criteria for Note” screen. This screen allows the user to select multiple criteria when filtering notes.



Click the **Add Condition** button to create additional criteria statements for the filter.

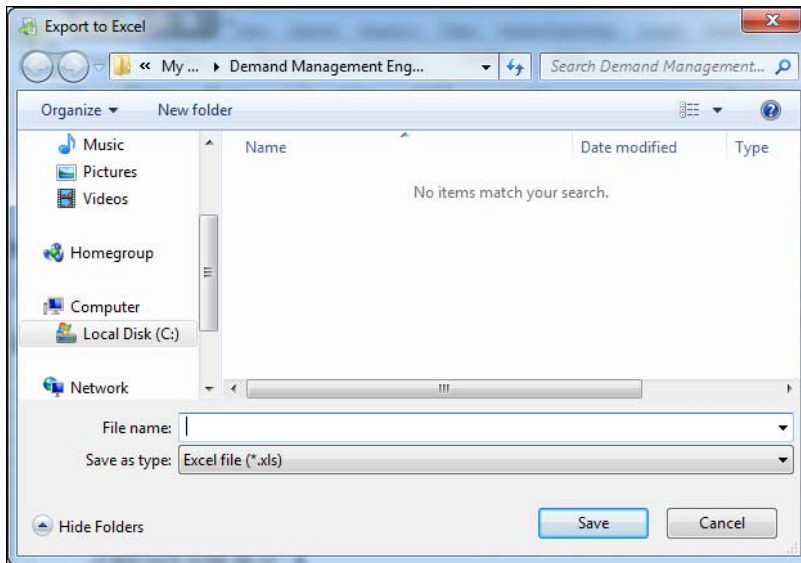
Exporting Notes

- 1 In the Notes View, right-click and select “Export to Excel”.



Note You can also export notes by clicking the Export to Excel button at the top of the Notes View window or on the Edit Note screen.

- 2 In the **Export to Excel** window, select the location on your computer where you want to save the notes as a spreadsheet.

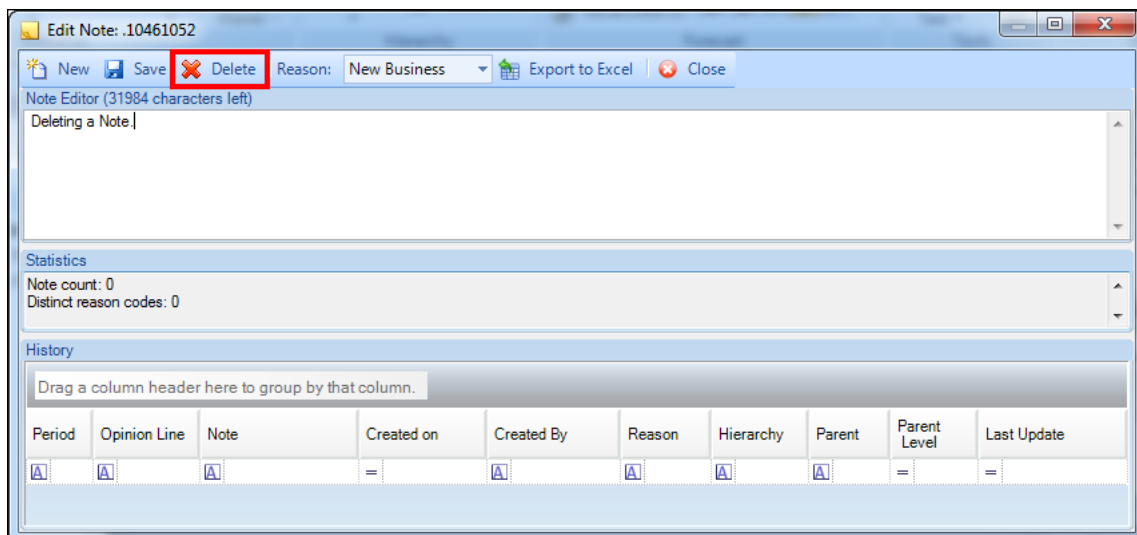


- 3 Enter the name you want to assign to the spreadsheet and click **Save**.

All notes entered for the selected period or series will be exported as a Microsoft Excel spreadsheet.

Deleting Notes

- 1 To delete a note, select it from the Notes View.
- 2 Double-click the note to open the Note Editor window.



- 3 Click the **Delete** button.
- 4 DME will prompt you to confirm the deletion. Click “Yes” and the note will be removed.

Chapter 3

Working in the DME Interface

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Ribbons

This section describes the toolbars in the Viewer and the different operations that can be performed from it.

The Ribbon consists of four tabs: **Home**, **Views**, **Inventory**, **AddIns**, and **Help**, the Inventory tab is an optional install and might not be displayed in your Ribbon. Each tab serves as a menu comprised of smaller sections containing different functionality. These tabs have replaced the drop-down menus in previous versions of DME.

Users can click on the title of each tab to switch to that tab within the Ribbon. Users with a roller wheel on their mouse can also use the wheel to scroll between tabs in the Ribbon.

The Ribbon also contains the **DME Viewer** button in the upper-left corner. Clicking this button opens a drop-down menu containing basic application functions such as Save, Print, or Exit. The DME Viewer button effectively replaces the **File** menu in previous releases of DME.

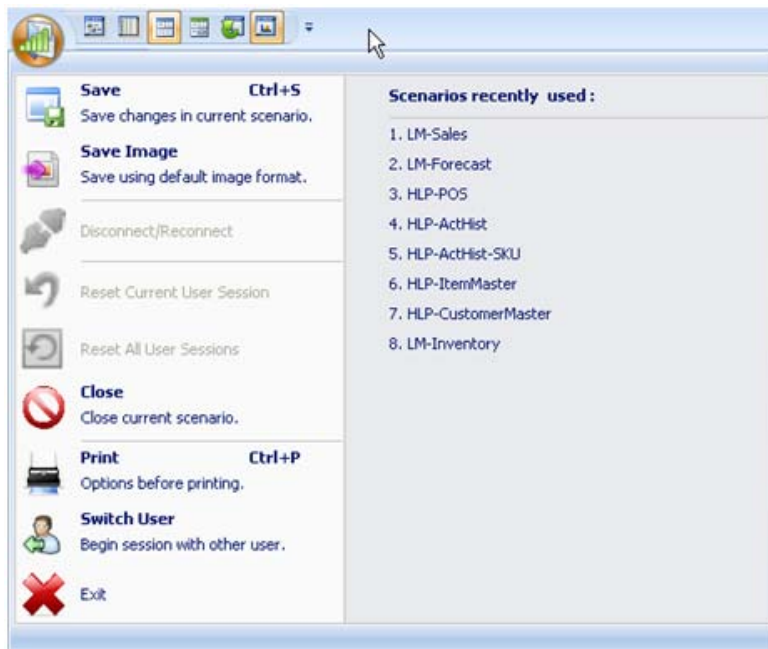
Below we will describe all the available features in the Ribbon with the following format: “*Tab > Section*”. For example, **Home > Scenarios** refers to the **Scenarios** section on the **Home** tab on the Ribbon.

DME Viewer Button

Located in the upper-left corner of the Viewer, this button serves as the “File” menu for the DME and contains basic functions such as Save, Print, and Exit.

Table 3.1

Option	Description
Save	Saves any changes made to the current scenario.
Save Image	Saves the current graph as an image file.
Disconnect/Reconnect	Allows you to either disconnect from or reconnect to the DME server. This option only applies if the Disconnect Mode was enabled during installation.
Close	This option is used to close the current scenario.
Print	This option is used to set printer options and print the current view (Data View, Graph View, etc.).
Logout	This option is used to log out of the current session, and log in as a different user.
Exit	Closes the Viewer as well as any open scenarios.



When you click on the DME Viewer button, the list of **Scenarios recently used** on the right will display the last ten scenarios that a user has opened.

Home > Scenarios

Table 3.2

Option	Description
Scenarios	This option can be used to open additional scenarios.
Filter	This option is used to launch a filter or open the Filter Manager. For more information see “Filter Management” on page 97.
Exception	This option is used to launch exceptions or open the Exceptions Manager. For more information see “Exceptions Manager” on page 108
Clear	This option is used to deactivate a filter or exception if either or both has been applied to the scenario. For more information see “Deactivate a Filter” on page 108
ABC	This option is used to run any defined ABC templates or open the ABC Manager. For more information on creating ABC templates, see “ABC Template Management” on page 121.
The Whole Tree option will only be available when the scenario has a Static Hierarchy applied to it.	
Living Master	This menu contains features that allow you to work with DTL scenarios and how they interact with Living Master Scenarios

Home > Hierarchy

Table 3.3

Option	Description
Hierarchy	This option is used to manage hierarchy structures which are used both for Static and On-Fly hierarchies. You can also apply Static hierarchies and open the Hierarchy Manager from this menu. For more information see “Grouping” on page 135
Remove	This option is used to remove a Static hierarchy from the current Scenario. If a scenario has been opened with an On-fly hierarchy, this option will not remove it. To remove an On-fly hierarchy, close the scenario and re-open it.
Rebalance	This option is used to redistribute changes made in a hierarchy to the other levels. There are two available options: • By Series - Any changes made in that series Level will be pushed to the upper and lower levels. • By Level - Any changes made in the selected level will be pushed to the upper and lower levels starting from that level. Note: When rebalancing a scenario that has both an On-Fly hierarchy and a filter applied to it, the Rebalance operation will only affect records displayed by the filter.

Home > Forecast

Table 3.4

Option	Description
Reforecast	This option is used to recalculate the forecast for an item or group of items based on the changes made to the history. The Whole Tree option will only be available when the scenario has a Static Hierarchy applied to it. Note: When a scenario has a static hierarchy applied to it and the user re-forecasts, the scenario needs to be rebalanced to apply the changes to other levels, whether or not the “On-fly rebalance” option was selected in the hierarchy.
Profile	Allows you create, maintain, and delete profiles used for LifeCycle Forecasting. For more information, see Chapter 9: LifeCycle Forecasting.
Recalculate SS	This option allows users to recalculate Safety Stock.

Table 3.4

Option	Description
Overwrite Adjusted Forecast	This option is used together with hierarchies. Whenever this option is enabled, any changes to the forecast will be overridden by a Rebalance operation. If this field is disabled, observations that have been adjusted will not be changed by rebalancing the tree.
Do Not Forecast	This option is used to set a flag indicating that the series should not be forecasted.
Do Not Report	This option is used to set a flag indicating that the series should not be included in reports.
Ready to Export	This option is used to set a flag that will indicate to the system that a series is ready to be exported for reports.
Roll Unsupported Forecast	This flag is used for the DRP. This flag toggles the “Roll Sales” option. It is used in the DRP process to include any unsupported forecast into the next periods recommended orders. For additional information, please refer to the Inventory Management User Guide.
Forecast Complete	This option is used to set a flag that will indicate to the system that the forecast for that series is finished. Only series that have this flag enabled will be committed back to the Living Master scenario when using the Commit option.

Home > Tools

This menu contains features that allow you to restrict the number of items displayed in the Viewer or change the attributes displayed in them. The following table describes each option:

Table 3.5

Option	Description
Custom Task	This option is used to run any defined custom tasks. For more information see “Custom Tasks Management” on page 80 .
Display Set	Allows you create, maintain, and delete Display Sets.

Home > Edit

This menu gives you options to edit the Status of the series in your scenario, as well as basic operation like Undo, Copy, Find, etc.

Table 3.6

Option	Description
Find	This option is used to find series in the currently selected scenario. The search is case sensitive.

Table 3.6

Option	Description
Undo	This option is used to undo your last changes. There are some operations that cannot be undone, such as: Reforecast, Adjustments to forecast using the Adjust feature, Status changes for multiple series and Copy/Rename/Clone/New Series operations. Note: When this option is used, any changes made before the last time you saved or changed to a different series will be undone.
Original	Used to reset the Forecast opinion line (FValue) to the values in the Original opinion line.
Series	Drop-down list containing the following options.
New	Used to create a new series in this scenario.
Copy/Move	This option is used to Copy or Move one or more series to another scenario. When copying a single series, you can select a new series description. Use the Replace existing series option to overwrite any series with the same description in the target scenario. If the Line up series by date option is used, the observations from the series will be aligned according to the observations dates for the series in the target scenario.
Clone/Rename	This option is used to make a clone of a series or to rename an existing series.
Delete	This option is used to delete the selected series.

Home > Events

The Event Manager in the DME Viewer is the primary source for defining and applying events to series. Using the Event Manager, you can create, remove, display, copy and edit events.

Table 3.7

Option	Description
Event Manager	Click this button to open the drop-down list and select an Event to apply, or to access the Event Manager screen.
Event View	Used to create new events and apply them to one or more series, hierarchy, or scenario.
Event Index	Used to create and apply an event index to one or more series, hierarchy or scenario.
Series View	Allows the user to filter the series displayed to view data, as well as view and apply events.
Lift Analysis	Used when running Event Model. This tab shows the lift factors of history when users select a Lift Type of “Automatic Event Model”.
Margin Analysis	Shows the old and new forecasts, event adjustments, costs, and margins by series for a selected event.
Event Summary	This window shows a summary of multiple events, including the sales before and after the event is applied, along with costs and margins.

Views > Conversion Settings

Table 3.8

Option	Description
Conversion	This options allows you to select a Conversion Group to apply.
Remove	Click this button to remove any Conversions settings that have been applied to the data.
Conversions	Click this button to access the Conversion Editor to create and maintain individual conversions.
Conversion Groups	Accesses the Conversion Group Editor to add or maintain conversion groups.

Views > Sort

Table 3.9

Option	Description
Sort By	In the Multi Series View, this option allows you to select a field by which to sort the series data.
Ascending / Descending	Use these buttons to apply either an ascending or descending sort for the Series; this affects both the Single Series View and Multi Series View whether or not a hierarchy has been applied.

Views > Options View

Table 3.10

Option	Description
Normal/Year	These options allow you to select which method to use for sorting.
Reset UI Layout	Resets user interface to its default display if you have customized the user interface. This drop-down also contains other custom views that you can select such as “Inventory” or “Summary” and restore the view to these layouts.
Refresh Series	Refreshes the current series.
Opinion Line Selector	Opens the “Opinion Line Selector” screen, allowing users to add or remove lines from the current view.

Views > Show/Hide

The **Data Views** drop-down allows users to select custom views to display data in the Viewer. These custom views can also be created and maintained from this drop-down by selecting the **Show Manager** button at the bottom of the list.

The remaining buttons allow you to select which views and information boxes you want to display in the Viewer. Available options are:

Table 3.11

- | | |
|------------------------|----------------------------|
| • Single Series View | • Demand Information |
| • Multiple Series View | • Notes |
| • Summary View | • Misc. Window |
| • Series Information | • Statistics View |
| • Graph Filter View | • Advanced Statistics View |

Click on any of these buttons to add that item to the current view. Selected items will display highlighted in orange. Click a highlighted item again to remove it from the current view.

Reports

The Reports tab is used to create Pivot Reports based off a specific data source and save the report as a template. These templates can then be selected and generated from the drop-down list.

Table 3.12

Option	Description
Reports	Click this button to open the Pivot Report drop-down and select an existing report to generate or use a template to run a custom report.
Create Reports	Click this button to open the Pivot Report window and create a report template to use when generating a report.

Reports > Reporting Services

The Reporting Services section contains a series of standard report templates that can be applied to the current data by selecting the report name from the category's drop-down list.

Table 3.13

Option	Description
Report Manager	Click this button to view the Report Manager screen which is used to create, maintain and delete reports.
Financial Reports	Displays budget in dollars vs. the revenue based on actual sales and forecast.
Accuracy Reports	Reports used to track forecast accuracy.
Time-Series Reports	Similar to the Summary View in DME.
Notes Reports	Reports any notes entered in DME or PP at either the series or observation level.
Exceptions Reports	Shows data that has the exception "No Sales in the last 6 months".
Workflow Reports	Shows details from the Planning Portal Workflow including Process, Task, Deadline, and Status.
Events Reports	Show data for records that have events associated with them.
Various Reports	Miscellaneous reports that do not fit into one of the existing categories.

Add-Ins > System

These are the default applications loaded with the DME. Not all users will have access to these applications.

Table 3.14

Option	Description
Admin Tool	This option allows you to log in to the DME Admin Tool.
Batch Scheduler	This option will open the DME Batch Scheduler. Users might not have rights to use this application and is based on their permissions.

Table 3.14

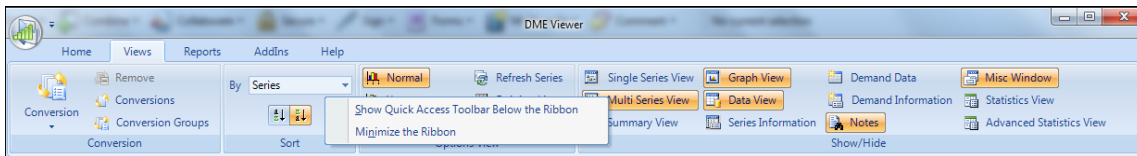
Option	Description
Planning Portal	Launches the Planning Portal application, if it is installed on the user's computer. If not, the Planning Portal can be accessed using the following default web address: http://localhost/planningportal/viewer.aspx
Retagging	This is an add-on to the DME Viewer used to move data within items. This option may not be available in your installation.

Add-Ins > User Define

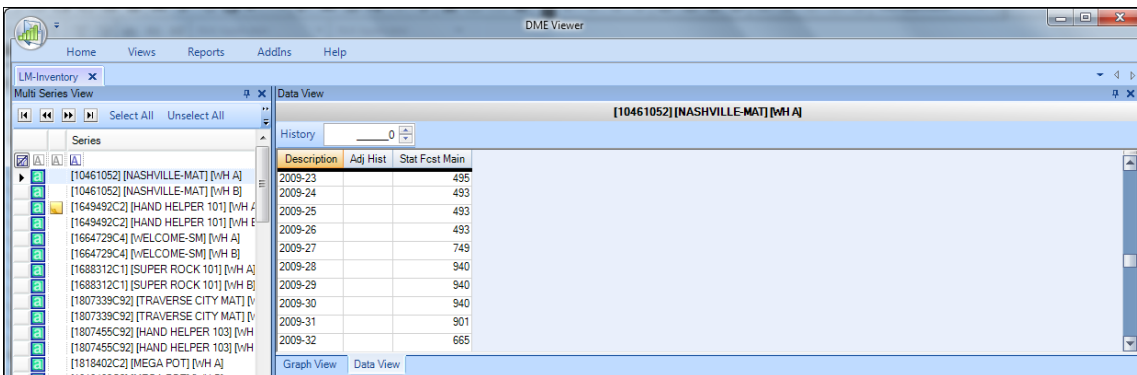
This section allows users to add other applications to the Ribbon for quick access. Click the **Application Manager** button to select the programs you want to add.

Hiding the Ribbon

Users also have the option to hide the Ribbon menus in the Viewer. Right-click on the Ribbon and select “Minimize the Ribbon” from the menu.



The Ribbon will no longer display, but can still be accessed by clicking on the tabs. The Ribbon will display temporarily, but will become hidden again once a selection has been made or the user clicks outside the Ribbon.



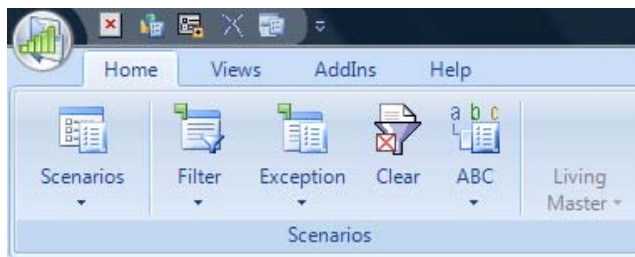
To expand the Ribbon permanently, right click on the menu bar and uncheck the “Minimize the Ribbon” option.

Quick Access Toolbar

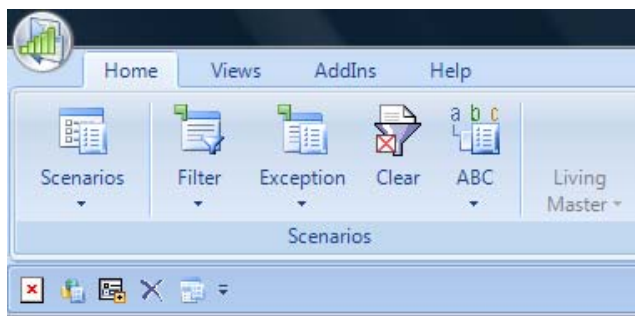
The Quick Access Toolbar allows you to select your most accessed functions and add them so they are always displayed next to the DME Viewer button, these functions will display as icons in the Quick Access Toolbar. Click on an icon in the toolbar to perform that function without using the Ribbon Menu options.

Displaying the Quick Access Toolbar

The Quick Access Toolbar can be displayed above or below the Ribbon. Right-click on the Ribbon and select “Show Quick Access Toolbar Above the Ribbon”. The toolbar now displays above the Ribbon, as shown below.

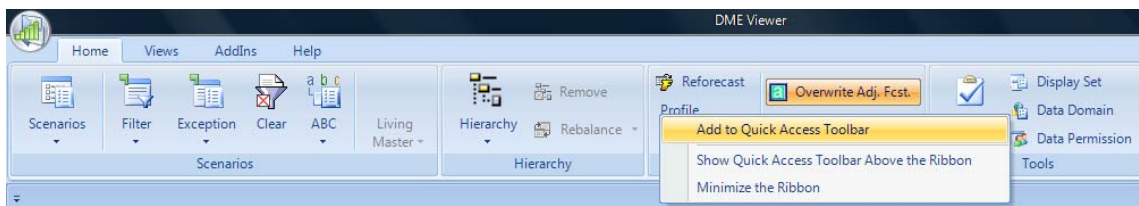


Right-click on the Ribbon Menu again and select “Show Quick Access Toolbar Below the Ribbon”. The toolbar now displays below the Ribbon, as shown below.



Adding items to the Quick Access Toolbar

To add an item to the Quick Access Toolbar, right-click on the function in the Ribbon, select “Add to Quick Access Toolbar” and the item is added as a new icon on the toolbar.



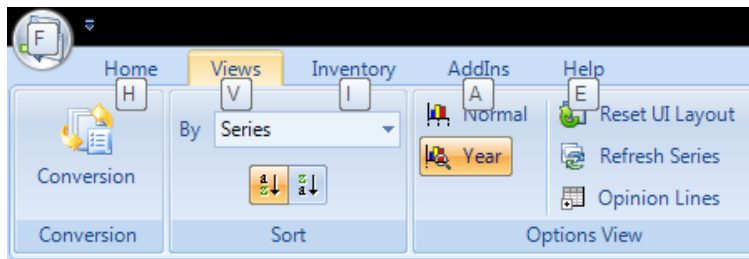
Removing Items from the Quick Access Toolbar

To remove icons from the Quick Access Toolbar, right-click on the icon and select “Remove from Quick Access Toolbar”. The icon is removed.

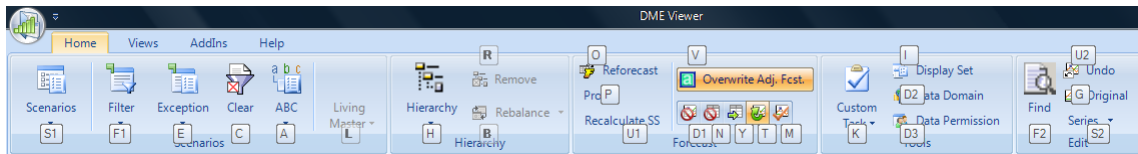
Keyboard Shortcuts

Ribbon

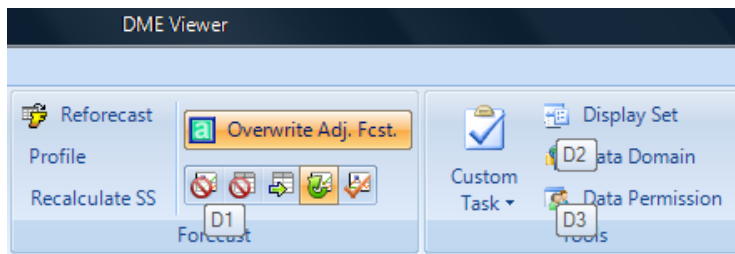
Click the **Alt** key to display a series of shortcuts to each Ribbon. Click the corresponding letter on your keyboard to switch to that menu. For example, in the screenshot below, click “H” to switch to the Home menu.



Once the shortcut has been selected, DME will switch to that Ribbon and display a shortcut for each function on the Ribbon. Press the corresponding key on the key board to perform that function.



Some shortcuts consist of two characters, such as “D1” (Do not Forecast button), “D2” (Data Domain) and “D3” (Data Permissions) in the example above. Click the first letter and any shortcuts that do not begin with that letter will disappear. Click the second number to select the corresponding function.



Click the **Esc** button at any time to remove the shortcut icons.

Functions

The table below details the shortcuts that can be used for features in the Viewer.

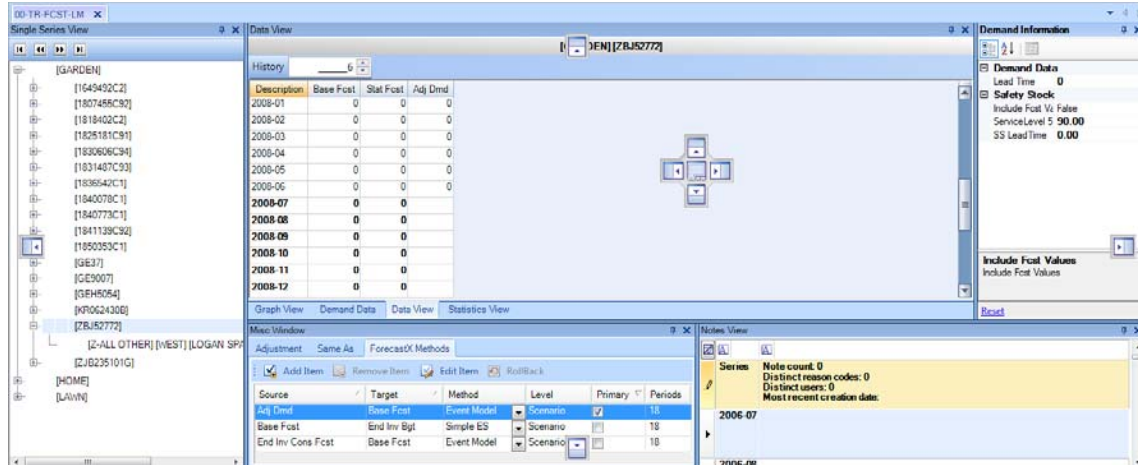
Table 3.15

Shortcut	Description
Alt+N	Select next row (Summary next OL, Detail/Multi next Series)
Alt+P	Select previous row (Summary previous OL, Detail/Multi previous Series)
Ctrl + C	Copy values
Ctrl + E	Expand exception runner
Ctrl + F	Find
Ctrl + L	Expand filter runner
Ctrl + N	Expand scenario runner
Ctrl + P	Print
Ctrl + R	Deactivate filter
Ctrl + S	Save the series values
Ctrl + T	Expand CT runner
Ctrl + V	Paste values
Ctrl + Z	Undo
Ctrl + Shift + A	Show/Hide Advanced Statistics View
Ctrl + Shift + C	Show/Hide Statistics View
Ctrl + Shift + D	Show/Hide Data View
Ctrl + Shift + E	Show/Hide Demand View
Ctrl + Shift + F	Show/Hide Demand Properties View
Ctrl + Shift + G	Show/Hide Graph View
Ctrl + Shift + I	Show/Hide Series Information View
Ctrl + Shift + M	Show/Hide Multi Series View
Ctrl + Shift + N	Show/Hide Notes View
Ctrl + Shift + S	Show/Hide Summary View
Ctrl + Shift + T	Show/Hide Single series view
Ctrl + Shift + W	Show/Hide Misc Window
F5	Refresh the current series
F6	Take focus adjustment tab
F7	Take focus Same As tab
F8	Take focus ForecastX tab
On Manager Screens:	
Ctrl + N	New item
Ctrl+ R	Reset UI
Ctrl + S	Save item
Ctrl + Del	Delete item
F5	Refresh list
On Event Manager screens (when opened and visible):	
F6	Take focus Event View
F7	Take focus Event Index
F8	Take focus Series View
F9	Take focus Lift Analysis
F10	Take focus Margin View
F11	Take focus Summary

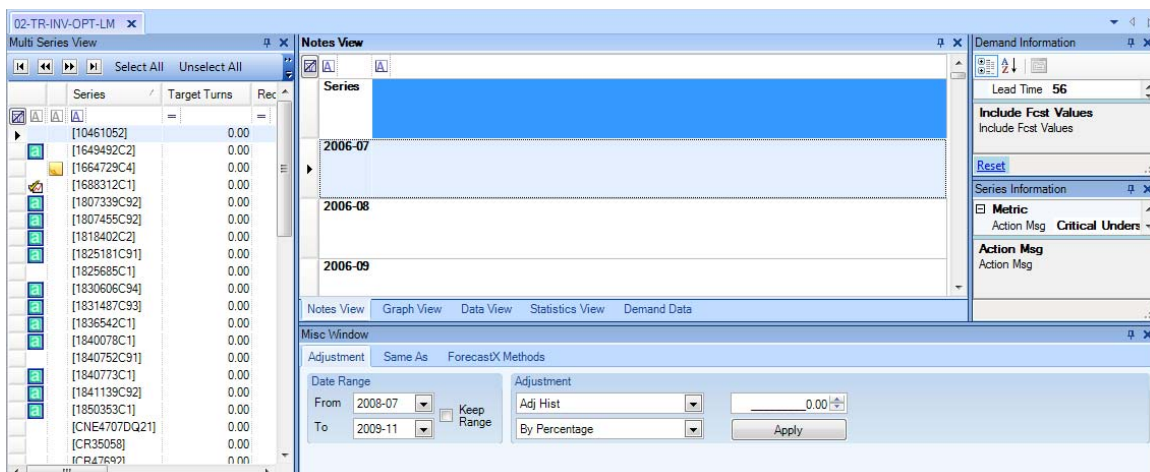
Customizing the Layout

You can arrange the panels in the Viewer in any order. The panes can be moved and configured by clicking on the title bars and dragging them to any location. A layout is only saved when the Scenario is closed.

- 1 Click and hold a view's header with your mouse.
- 2 Move the window slightly.
The Maneuver arrows display in the center of the screen.

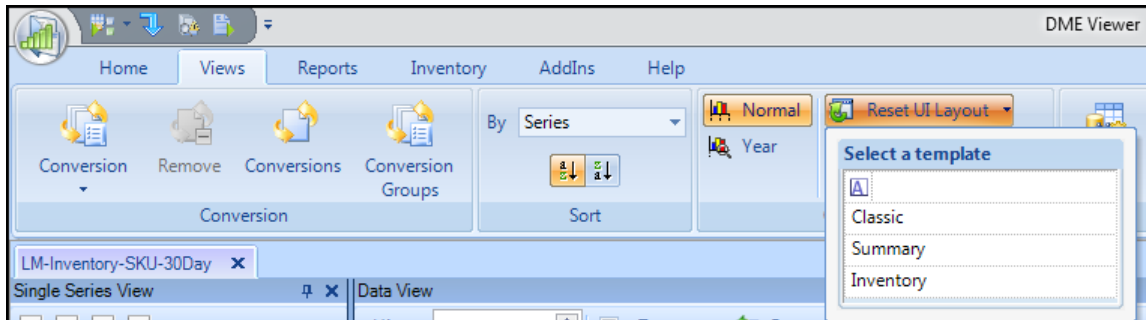


- 3 Move the window to where you would like to place it in the Viewer's user interface.
- 4 As you move the window, the four arrow buttons turn blue and move with the direction you move the window.
- 5 Drop the window to where you would like it displayed in the user interface.
- 6 Dropping the view in the center of the arrows will add the window as a tab page in the main view. In the example below, the Notes View has been added as a tab page.



- 7 Click the **Reset UI Layout** button in the **Options View** section of the **Views** menu to return all windows to their original locations.

The **Reset UI Layout** button also provides a drop-down that allows you to select a custom Data View and restore the view to the selected layout.

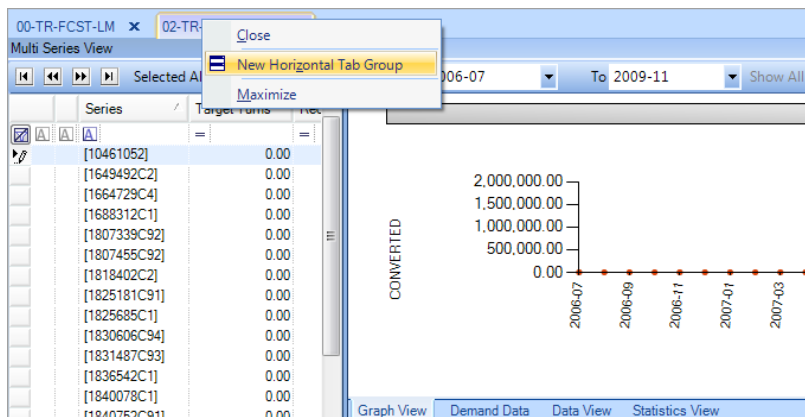


Note For more information on custom Data Views, please refer to [“Views > Show/Hide > Data View”](#) on page 92.

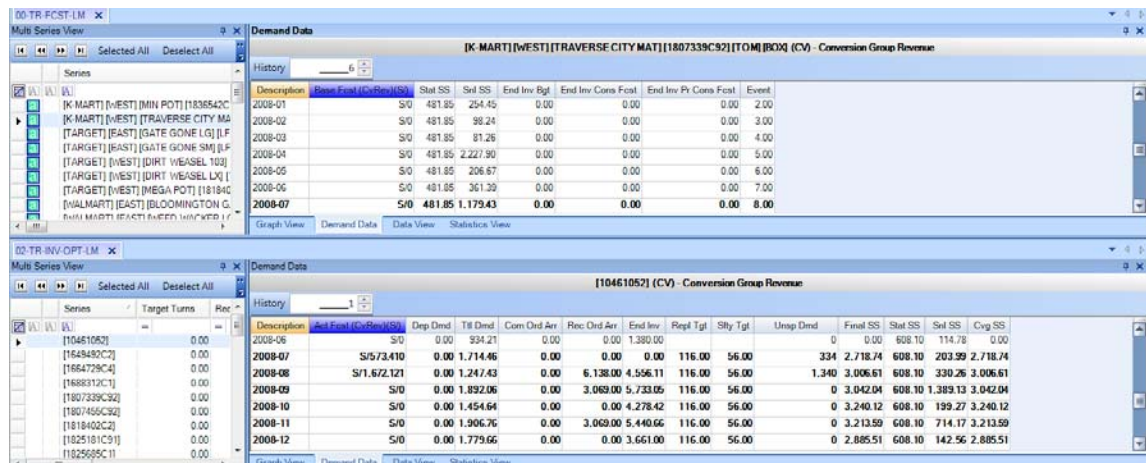
Horizontal Grouping

Users can display multiple Scenarios in the Viewer by using the Horizontal Grouping feature. This feature allows you to view two different Scenarios at the same time.

To group the scenarios, open the scenarios you want view. Right-click on the tab of a Scenario in the Multi Series View and select “New Horizontal Tab Group”.



The two Scenarios now display simultaneously:



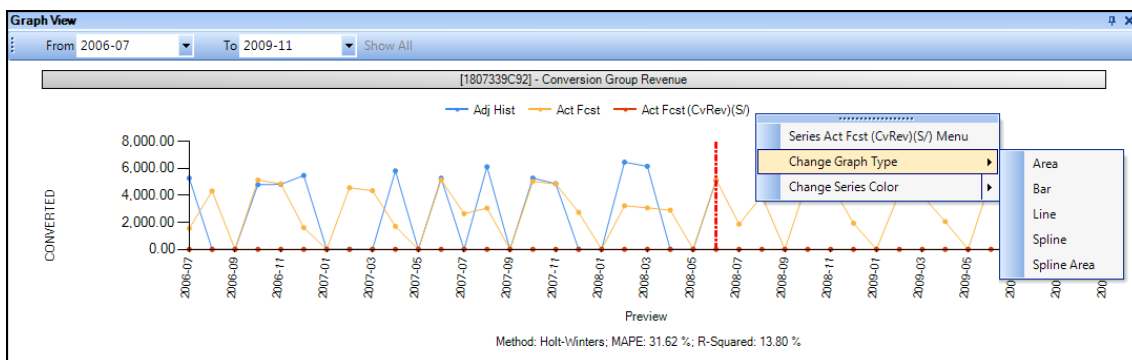
To remove the grouping, right-click on the Scenario tab and select “Move to Previous Tab Group”. The Viewer is returned to the single scenario view.

Customizing the Graph View

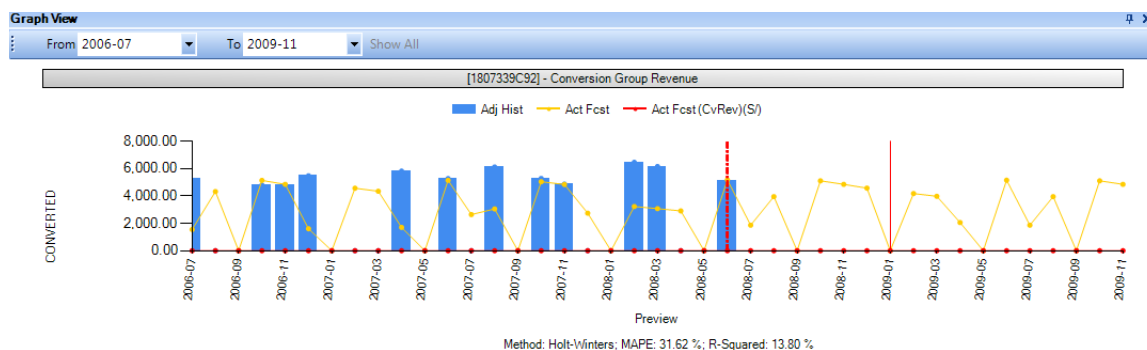
Users have the option to customize how their data is represented in the Graph View. Users can select the type of graph used to display the data, as well as the color scheme used in the graph.

Change Graph Type

To change the type of graph that displays in the Graph View, right-click on the forecast line you want to update in the color legend at the top of the Graph View. From the menu, select “Change Graph Type”.

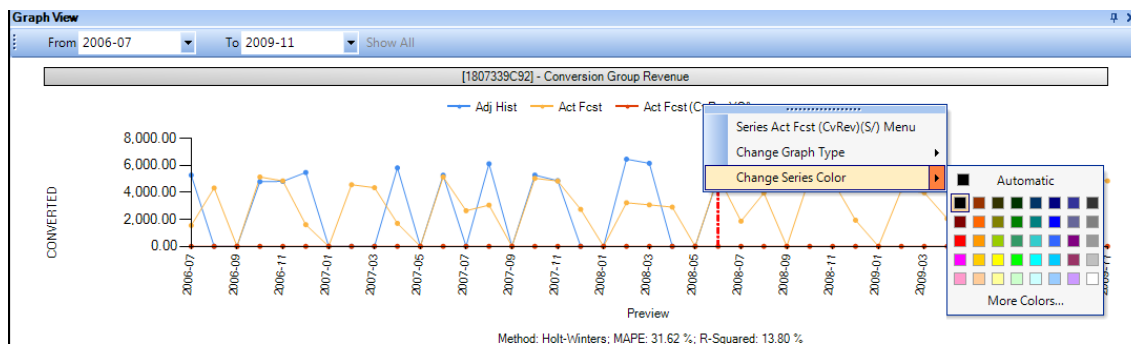


From the list, select the type of graph you want to use to display the line you selected. This graph type will only display for the line you selected when right-clicking. The Graph View can display different types for each line. For example, in the screenshot below, the “Adj Hist” is displayed as a Bar graph, while the “Acct Fcst” is a Line graph.



Change Series Color

To change the color of the lines used in the Graph View, right-click on the forecast line you want to update in the color legend at the top of the Graph View. From the menu, select “Change Series Color”. Use the color palette to select the color you want to use in the graph.



Working with Scenario Tabs

Each open Scenario displays on its own tab in the Series View. Users can click and drag a tab to change the orders of the tabs. Users can also close these tabs by clicking the “X” on each tab or by right-clicking on the tab and selecting “Close”. Users with a roller wheel on their mouse can also click the wheel on a tab to close it.

Customizing the Viewer

Overview 74

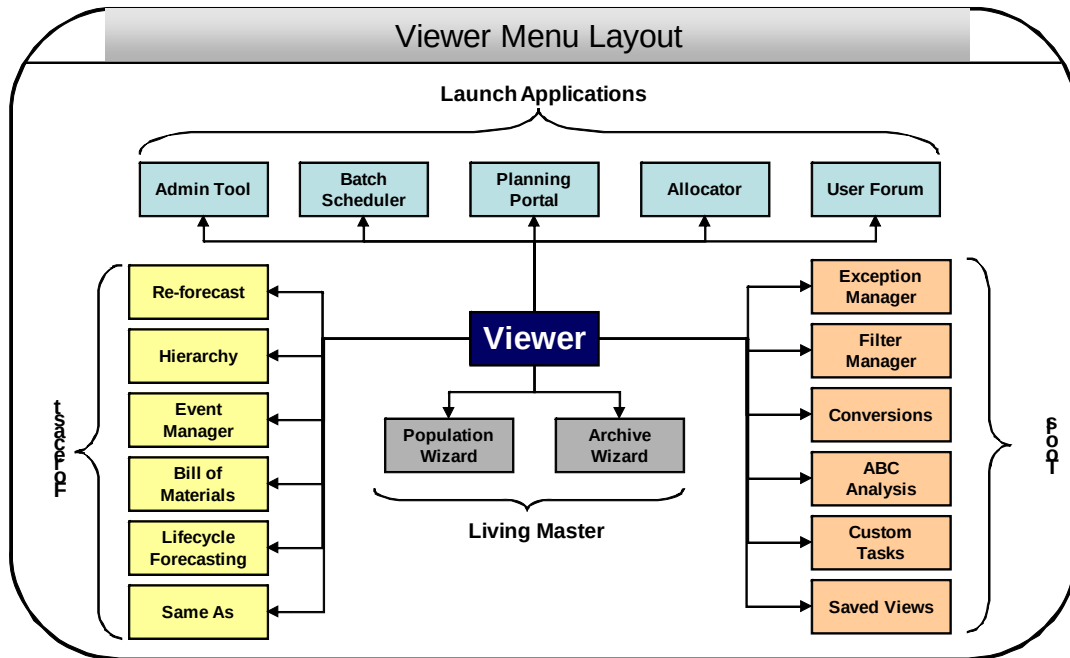
Display Set Management 74

Custom Tasks Management 80

Views Menu 88

Overview

A key benefit of a forecasting process is that it enables you to see information using familiar terms and displaying information on-demand. The Viewer provides the vehicle for making adjustments and interacting with the forecast. A key element in this process is the customization of the labels and field descriptions within the tool. The following illustration details the major options that are available within the Viewer:



This chapter details the customization options available in the DME Viewer through Display Sets and file selection within each of the data analysis views in the tool.

This chapter also details how to customize the Viewer. The Viewer supports high-levels of customization that match a user's needs.

Display Set Management

Using the Display Set function you can customize the following:

- Specify a name (alias) for each Opinion Line or series field.
- Hide an Opinion Line.
- Specify the number of decimal positions.

A Display Set enables you to rename the defined series and Observation Fields. It is a feature in the DME Admin Tool that allows you to share and apply to one or more Scenarios. When you open a Scenario affected by a Display Set, the Viewer displays the aliases instead of the default names.

A Display Set is composed of the following:

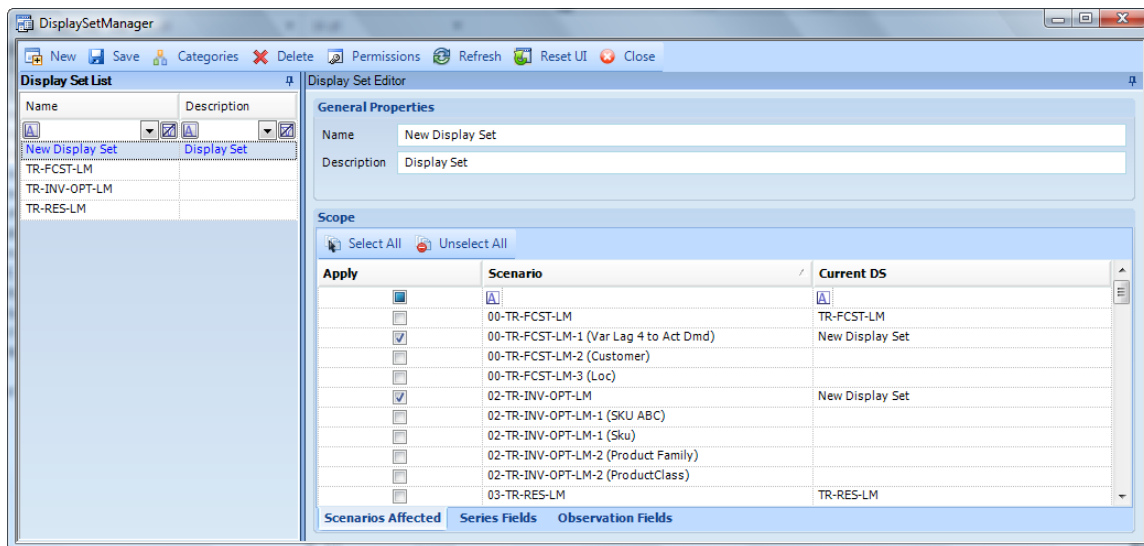
Table 4.1

Component	Description
Name	Name of the current Display Set.
Description	Description of the current Display Set.
Scenarios Affected List	Names of the Scenarios that are affected by the current Display Set.
Series Fields definition	Defines the number of decimal points, the visibility of the fields at series level, and the alias of each series field.
Observations Fields definition	Defines the number of decimal points, the visibility of the fields at Observations level, and the alias of each observation field (Opinion Line).

Create a Display Set

- 1 Click the **Display Set** icon In the **Tools** section of the **Home** menu.

The Display Set Manager window displays.



- 2 Click the **New** button. The fields in the Display Set Editor are cleared for entry.

Display Set Editor

General Properties

Name

Description

Scope

Select All Unselect All

Apply	Scenario	Current DS
☒	A	A
☐	00-TR-FCST-LM	TR-FCST-LM
☐	00-TR-FCST-LM-1 (Var Lag 4 to Act Dmd)	New Display Set
☐	00-TR-FCST-LM-2 (Customer)	
☐	00-TR-FCST-LM-3 (Loc)	
☐	02-TR-INV-OPT-LM	New Display Set
☐	02-TR-INV-OPT-LM-1 (SKU ABC)	
☐	02-TR-INV-OPT-LM-1 (Sku)	
☐	02-TR-INV-OPT-LM-2 (Product Family)	
☐	02-TR-INV-OPT-LM-2 (ProductClass)	
☐	03-TR-RES-LM	TR-RES-LM
☐	FC-SLOW-MOVING	TR-FCST-LM
☐	NEW SCENARIO	
☐	NEW SCENARIOS	

Scenarios Affected Series Fields Observation Fields

There are two main sections to this window:

- General Properties
- Scope - Scenarios Affected, Series Fields, and Observation Fields tabs

3 In the **General Properties** section, enter a **Name** for the Display Set in the textbox.

4 Enter a **Description** for the Display Set in the textbox.

General Properties

Name

Description

5 On the **Scenarios Affected** tab, use the checkboxes in the **Apply** column to select the Scenarios that will be affected by this Display Set.

Scope

Select All Unselect All

Apply	Scenario	Current DS
☒	A	A
☐	00-TR-FCST-LM	TR-FCST-LM
☐	00-TR-FCST-LM-1 (Var Lag 4 to Act Dmd)	New Display Set
☐	00-TR-FCST-LM-2 (Customer)	
☐	00-TR-FCST-LM-3 (Loc)	
☐	02-TR-INV-OPT-LM	New Display Set
☐	02-TR-INV-OPT-LM-1 (SKU ABC)	
☐	02-TR-INV-OPT-LM-1 (Sku)	
☐	02-TR-INV-OPT-LM-2 (Product Family)	
☐	02-TR-INV-OPT-LM-2 (ProductClass)	
☐	03-TR-RES-LM	TR-RES-LM
☐	FC-SLOW-MOVING	TR-FCST-LM
☐	NEW SCENARIO	
☐	NEW SCENARIOS	

Scenarios Affected Series Fields Observation Fields

Note The Current DS column indicates the name of the Display Set to which the Scenario currently belongs. Since a Scenario can only belong to one Display Set, you select a Scenario that is currently part of another Display Set, the Current DS field will be overwritten.

6 In the **Scope** section, click the **Series Fields** tab.

Scope

Select All Unselect All Add Add All

Category	Physical Name	Alias	Active	Dec. Points	Label
Customer	Cust01	City	☒	2	
Customer	Cust02	State	☒	2	
Customer	CustomerRank	CustomerRank	☒	2	
Customer	CustomerType	CustomerType	☒	2	
Customer	LocationCountry	LocationCountry	☒	2	
Customer	LocationName	LocationName	☒	2	
Customer	LocationRank	LocationRank	☒	2	
Customer	LocationRegion	LocationRegion	☒	2	
Customer	LocationState	LocationState	☒	2	
Customer	ParentName	ParentName	☒	2	
Customer	ParentRank	ParentRank	☒	2	
Customer	ParentRegion	ParentRegion	☒	2	

Scenarios Affected Series Fields Observation Fields

- Click the **Add** button to insert a new row in the grid, or click **Add All** to insert all available options.
- Select the **Category** and **Physical Type** from the drop-down lists.
- In the **Alias** column, enter a *new name*.
- Use the **Active** column to select which fields are active.
- Use the drop-down list in the **Dec. Points** column to select the number of decimal positions required. Note that the Decimal Points option is not applicable to string fields.

12 Use the drop-down lists in the **Label** field to specify the order in which these Attributes are used to define the new Series description.

13 Click **Save** to save this new Display Set.

The next time that you open an affected Scenario, you will see that it locks the Display Set as it was defined.

Edit a Display Set

1 On the **Display Set List**, select the *Display Set* you want to modify and click the **Edit** button.

The screenshot shows the 'Display Set Manager' application. On the left is the 'Display Set List' with a table containing 'New Display Set', 'TR-FCST-LM', 'TR-INV-OPT-LM', and 'TR-RES-LM'. The 'New Display Set' is selected. On the right is the 'Display Set Editor' window. It has a 'General Properties' section with 'Name' as 'New Display Set' and 'Description' as 'Display Set'. Below that is the 'Scope' section with a table of attributes. The table has columns: Category, Physical Name, Alias, Active, Dec. Points, and Label. The 'Customer' category is selected, and the table lists attributes like Cust01, Cust02, CustomerRank, CustomerType, LocationCountry, LocationName, LocationRank, LocationRegion, LocationState, ParentName, and ParentRank. The 'Active' column has checkboxes, and the 'Dec. Points' column has values like 2. The 'Label' column has dropdown menus.

2 The **Display Set** tab opens and displays the selected record.

3 Make any necessary changes to the Display Set and click **Save**.

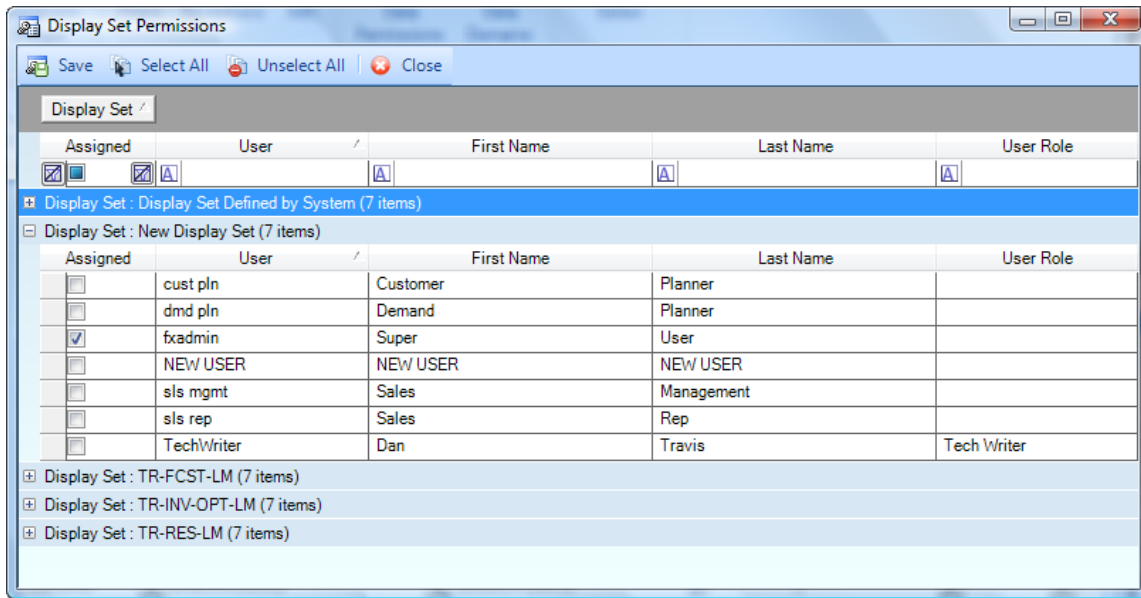
Share a Display Set

You can share a Display Set with other users. Once it is shared, other users can apply it to their Scenarios, but will not be able to modify the Display Set.

Note If a user is populating data from the Living Master Scenario, by default the Display Set from the Living Master is applied to the DTL Scenario and the display set is shared with the user.

1 On the **Display Set Manager**, select the *Display Set* you want to share and click the **Permissions** button.

2 The **Display Set Permissions** window opens.

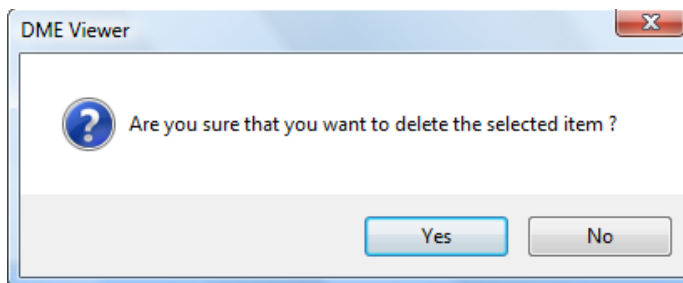


3 Use the **Assigned** checkboxes to indicate the users you want to have access to this Display Set.

4 Click **Save**.

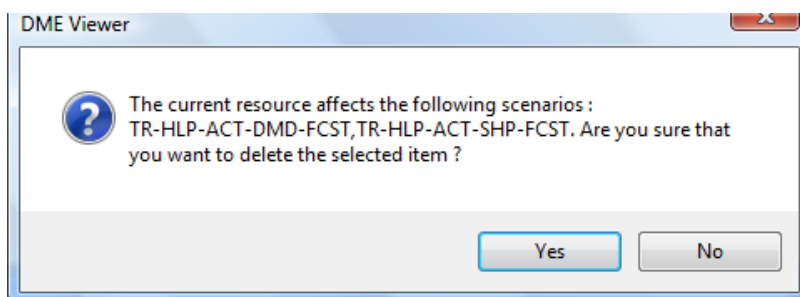
Remove a Display Set

- 1 Select the Display Set you want to remove and select **Delete**.
The following message displays.



- 2 Click **Yes** to delete the Display Set.

If the Display Set currently affects Scenarios, the following message displays asking you to confirm the deletion.

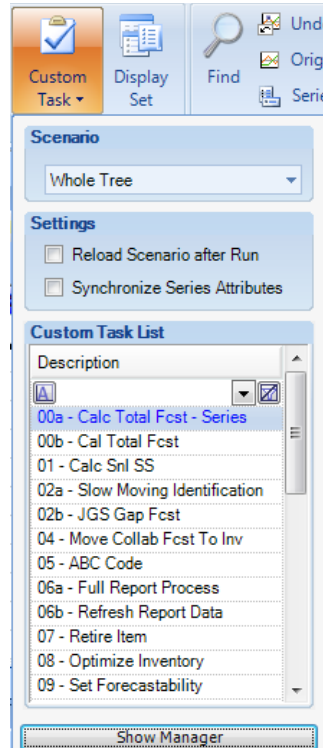


Custom Tasks Management

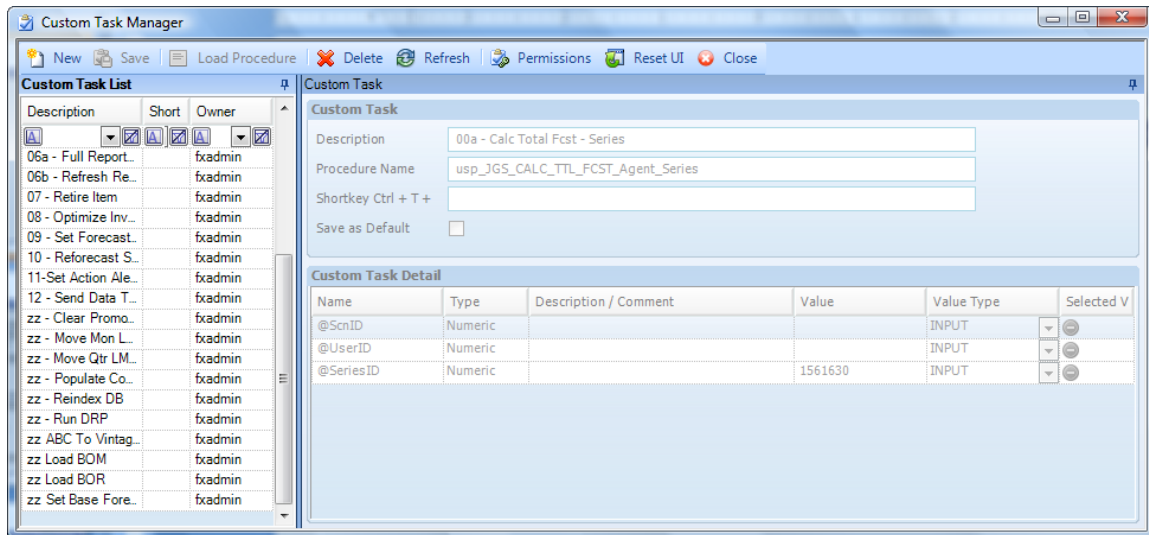
Custom Tasks are special calculations such as an Order Replenishment Calculation. Using the Custom Tasks function in the Viewer, you can create, delete, edit and share custom tasks. Custom Tasks are created and applied from the Viewer.

Create a Custom Task

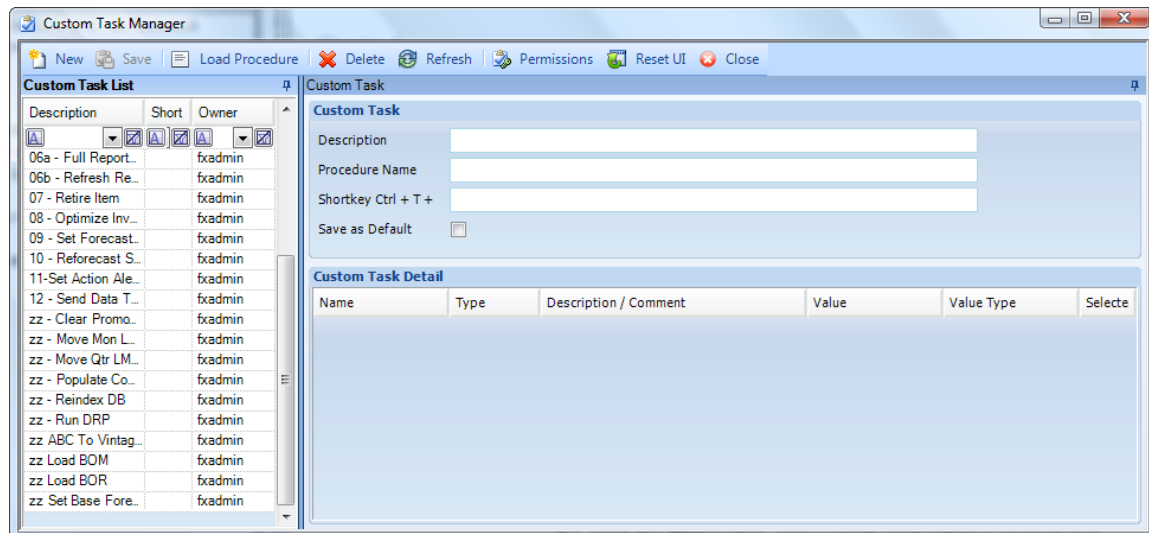
- 1 In the **Tools** section of the **Home** menu, click on the **Custom Task** icon to expand the drop-down menu.



- 2 Click the **Show Manager** button.
The **Custom Task Manager** window displays.



3 Click the **New** button. The Custom Task panel is cleared and activated.



- 4 Enter a **Description** for this task.
- 5 Enter the name of the *stored procedure* you want to use in the **Procedure Name** field.
- 6 The **Shortcut Ctrl + T +** field allows you to create a keyboard shortcut key to apply this task. For example, if you entered C in this field, pressing Ctrl+ T+ C will apply this task.
- 7 Check the **Save as Default** box to enable the parameter values to be used in Hierarchies and Detail Scenarios.
- 8 Click the **Load Procedure** button.

If the stored procedure does not exist in the DME database, an error message displays.

To use a stored procedure in a Custom Task, the following rules apply and all parameter names are case sensitive:

- The first parameter must be “@ScnID” with the **Type** set to “Numeric”. The DME passes the Scenario ID to this parameter automatically when you run the custom task.

- The second parameter must be “@UserID” with the **Type** set to “Numeric”. The DME passes the user ID to this parameter automatically when you run the custom task.
- If you want the DME to pass the series ID of the selected series, add the parameter “@SeriesID” with the **Type** set to “Numeric” in your stored procedure. This parameter can be anywhere in the definition of the stored procedure except the first or second position.
- To run a custom task that only affects the data that is currently displayed in the Viewer, you can use the “@UserSessionID” parameter. For example, you could use this parameter to generate the resulting series from running a filter or an exception.

However, this parameter does require some logic to be included in your Custom task and you must use this new parameter to limit the series used in your custom task to the ones in the dme5SeriesViewer table. For example, performing a JOIN between the Series table and the dme5SeriesViewer table with a WHERE clause of UserSessionID equals @UserSessionID.

* If there are additional parameters in the stored procedure besides @ScnID and @UserID, then you must provide the default values for these parameters.

Custom Task

Custom Task

Description

05 - ABC Code

Procedure Name

USP_ABC_CustomTask

Shortkey Ctrl + T +

Save as Default

☐

Custom Task Detail

Name	Type	Description / Comment	Value	Value Type	Selected
@ScnID	Numeric			INPUT	
@UserID	Numeric			INPUT	
@DataFld	String	Fvalue	Fvalue	INPUT	
@ConvFld	String	ConvFactor10	ConvFactor10	INPUT	
@useConv	Boolean	0	0	INPUT	
@FromDate	String	2004-10	2004-10	INPUT	
@ToDate	String	2007-10	2007-10	INPUT	
@GroupBy	String	sku	sku	INPUT	
@APerc	Numeric	70	70	INPUT	

For parameters other than “@ScnID”, “@UserID”, “@SeriesID” and “@UserSessionID”, you can enter a description to explain the parameters, and set initial values and value lists for these parameters.

- The **Value** field indicates how values for parameters are entered when running the custom task.
 - **INPUT** - The user must enter the value.
 - **LIST** - Select a value from a drop-down list of custom options.
 - **QUERY** - Uses a custom command to query the database and generate a list of values to choose from.

If you select INPUT as the Value for a parameter, you must enter the initial value for that parameter.

- If you selected LIST as the Value for a parameter, click the **Edit List** link that displays in the **Selected Value** column

Custom Task Detail					
Name	Type	Description / Comment	Value	Value Type	Selected V
@ScnID	Numeric			INPUT	
@UserID	Numeric			INPUT	
@Prod_Cycle	String		Prod Cycle	LIST	Edit List
@Svc_Lvl	String		Service Level	LIST	Edit List
@Fcst_Data	String		Forecast	LIST	Edit List
@Hist_Data	String		History	LIST	Edit List
@Update_SS_Calc	String		Safety Stock	LIST	Edit List
@Update_FC_Calc	String		Ttl Fcst Calc	LIST	Edit List
@Update_TL_Calc	String		Ttl SS Calc	LIST	Edit List

11 The **Edit Custom Task Value List Query** window displays.

Parameter Name : @Update_TL_Calc

Add Row

Value	Text
X11Irregular	Ttl SS Calc
*	

Ok

12 Enter a list of values and text in the **Value** and **Text** columns.

The Value column contains the values used to pass to the stored procedure when the custom task runs. The Text column contains the labels for their corresponding values, which are displayed in the drop-down list you see when running a custom task.

13 Click **Ok**.

14 If you selected QUERY as the Value Type for a parameter, click the **Edit List** link that displays in the **Selected Value** column

Custom Task Detail					
Name	Type	Description / Comment	Value	Value Type	Selected Val
@scn	Numeric			INPUT	▼
@usr	Numeric			INPUT	▼
@sd_range	Numeric	Range of standard deviations	2	INPUT	▼
@sd_hit_limit	Numeric	Standard Deviation outside range limit	4	INPUT	▼
@cv_limit	Numeric	Coefficient of Variation limit	0.90	INPUT	▼
@zero_pd_ratio_limit	Numeric	Zero Period ratio limit	0.50	INPUT	▼
@wmape_limit	Numeric	Weighted MAPE limit	0.50	▼ QUERY	▼ Edit Query

The **Edit Custom Task Value List Query** window displays.

Parameter Name :

Query Statement : (Note : Use @UserID to refer to current User,
Use @ScenarioID to refer to current scenario).

SELECT [col1] AS [Value], [col2] AS [Text]
FROM [Table list]
WHERE [Where condition]

/* Insert sentence here */

Ok Cancel

- 15 Enter a query that returns the list of pairs of value and text. Make sure [Value] is unique in the query results.
- 16 Click **Ok**.
- 17 Select a value from the drop-down list or enter a value as the initial value for each parameter except “@ScnID”, “@UserID”, and “@SeriesID”.
- 18 Click **Save Custom Task**.

Edit a Custom Task

- 1 From the **Custom Task Manager** window, select the task you want to modify.
- 2 Click the **Edit** button. The **Custom Task** panel activates and displays the settings for the selected task

Custom Task

Description: 05 - ABC Code

Procedure Name: USP_ABC_CustomTask

Shortkey Ctrl + T +

Save as Default: ☐

Custom Task Detail

Name	Type	Description / Comment	Value	Value Type	Selected
@ScnID	Numeric			INPUT	
@UserID	Numeric			INPUT	
@DataFld	String	Fvalue	Fvalue	INPUT	
@ConvFld	String	ConvFactor10	ConvFactor10	INPUT	
@useConv	Boolean	0	0	INPUT	
@FromDate	String	2004-10	2004-10	INPUT	
@ToDate	String	2007-10	2007-10	INPUT	
@GroupBy	String	sku	sku	INPUT	
@APerc	Numeric	70	70	INPUT	

3 Modify the *Custom Task* and click **Save**.

Delete a Custom Task

1 From the **Custom Task Manager** window, select the task you want to delete.

Custom Task Manager

New Save Load Procedure Delete Refresh Permissions Reset UI Close

Custom Task List

Description	Short	Owner
06a - Full Report...		fxadmin
06b - Refresh Re...		fxadmin
07 - Retire Item		fxadmin
08 - Optimize Inv...		fxadmin
09 - Set Forecast...		fxadmin
10 - Reforecast S...		fxadmin
11-Set Action Ale...		fxadmin
12 - Send Data T...		fxadmin
zz - Clear Promo...		fxadmin
zz - Move Mon L...		fxadmin
zz - Move Qtr LM...		fxadmin
zz - Populate Co...		fxadmin
zz - Reindex DB		fxadmin
zz - Run DRP		fxadmin
zz ABC To Vintag...		fxadmin
zz Load BOM		fxadmin
zz Load BOR		fxadmin
zz Set Base Fore...		fxadmin

Custom Task

Description: 00a - Calc Total Fcst - Series

Procedure Name: usp_JGS_CALC_TTL_FCST_Agent_Series

Shortkey Ctrl + T +

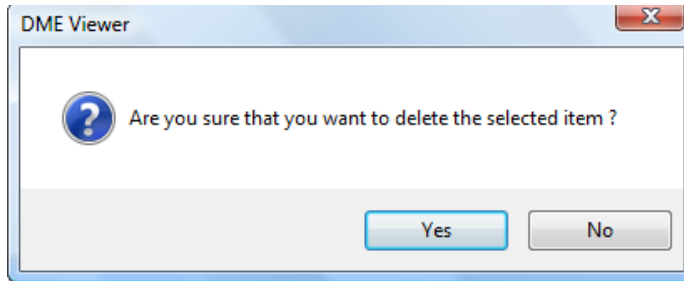
Save as Default: ☐

Custom Task Detail

Name	Type	Description / Comment	Value	Value Type	Selected V
@ScnID	Numeric			INPUT	
@UserID	Numeric			INPUT	
@SeriesID	Numeric		1561630	INPUT	

2 Click the **Delete** button.

3 The confirmation window displays asking you to confirm the deletion.

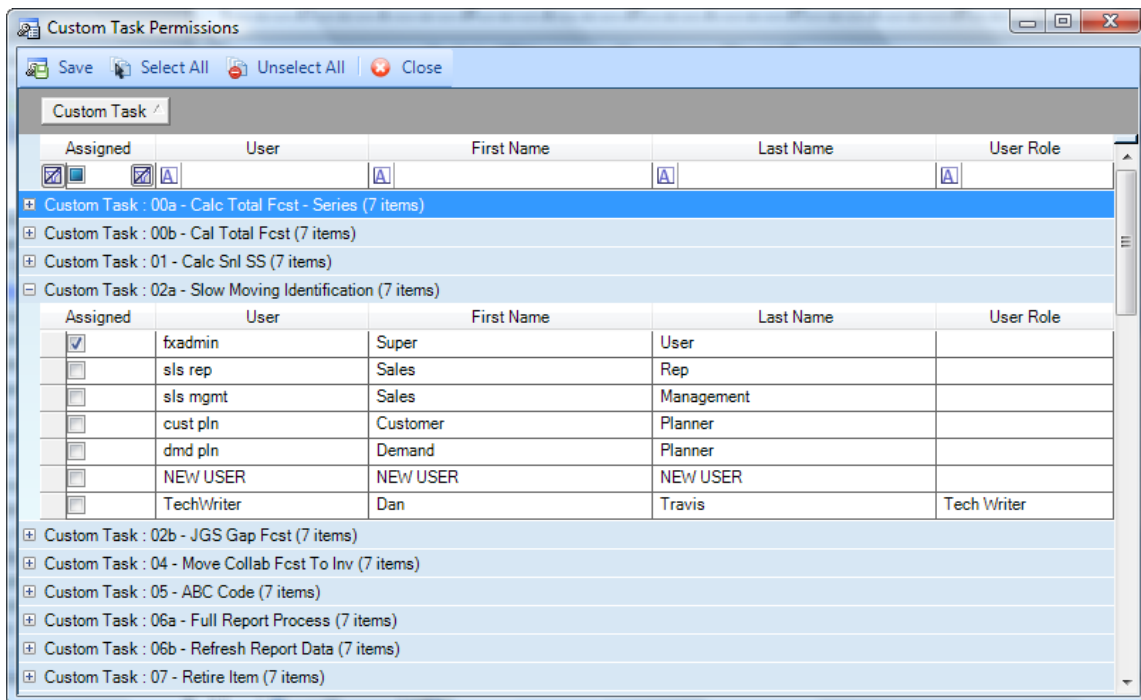


- 4 Click **Yes**.

Share a Custom Task

You can share a Custom Task that you own with other users. Once it is shared, other users can run it in their own Scenario, but they cannot modify the custom task.

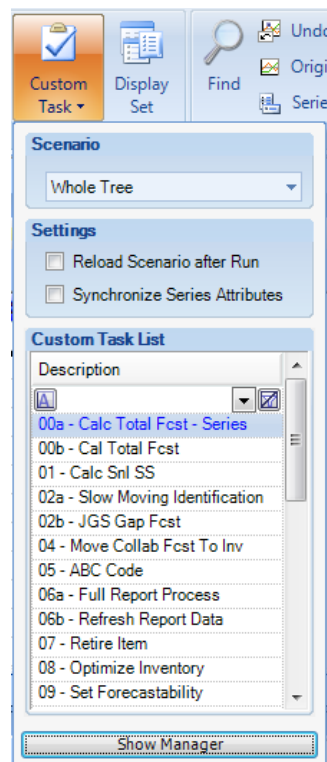
- 1 From the **Custom Task Manager** window, select the task you want to share.
- 2 Click the **Permissions** button. The **Permission Editor** tab displays.



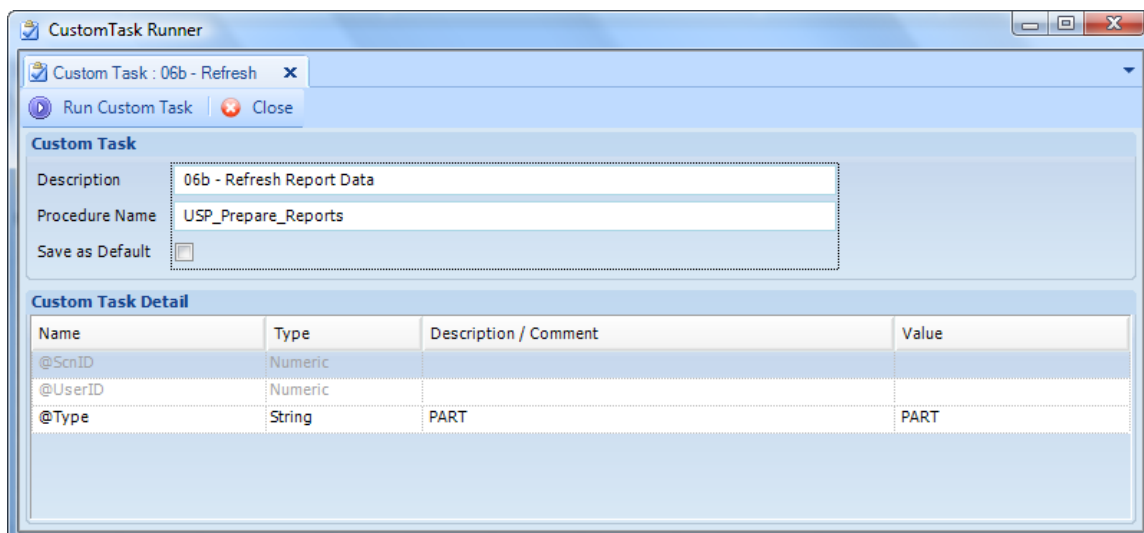
- 3 Use the checkboxes in the **Assigned** column to select the *users you want to share this task with*.
- 4 Click **Save**.

Run Custom Tasks

- 1 In the **Tools** section of the **Home** menu, click on the **Custom Task** icon.



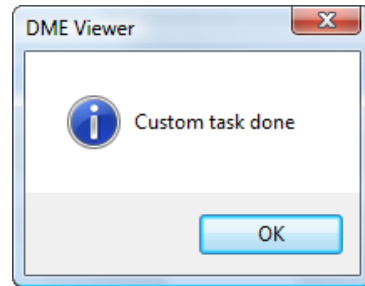
- 2 Select a *custom task* from the drop-down list.
The **Custom Task Runner** displays.



- 3 Make sure a **Value** is entered or selected for each parameter you want to use.
- 4 Click the **Run Custom Task** button.

Note If you want to use these values for other Scenarios, check the **Save as Default** checkbox.

- 5 The DME displays a messaging indicating the task is done.



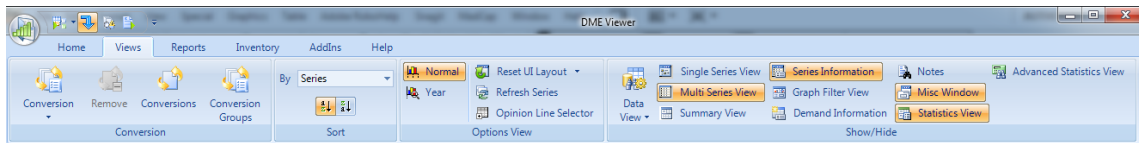
Views Menu

On the Viewer toolbar, the **Views** menu provides additional options for how to customize your information. You can configure the Viewer user interface to have specific information readily viewable and available.

From this menu you can select to display the different panes available to view information.

Note Please remember that the panes in the DME Viewer are all completely dockable. This means you can configure them in any way helps you view your data better, including floating panes or moving panes to different monitors in a dual monitor setup.

From the Viewer toolbar, click the **Views** tab. The following ribbon displays:



The tables below provide detailed information for each feature. Some of these features will be further explained in this section.

Views > Conversion Settings

Table 4.2

Option	Description
Conversion	This options allows you to select a Conversion Group.
Remove	Click this button to remove the Conversion Group currently applied to the view.
Conversions	Accesses the Conversion Editor which allows users to add and maintain conversions.
Conversion Groups	Accesses the Conversion Group Editor which allows users to add and maintain conversion groups.

Views > Sort

Table 4.3

Option	Description
Sort By	In the Multi Series View, this option allows you to select a field by which to sort the series data.
Ascending / Descending	Use these buttons to apply either an ascending or descending sort for the Series; this affects both the Single Series View and Multi Series View whether or not a hierarchy has been applied.

Views > Options View

Table 4.4

Option	Description
Normal/Year	These options allow you to select which method to use for sorting.
Reset UI Layout	Resets user interface to its default display if you have customized the user interface. See “Customizing the Layout” on page 69 for additional information.
Refresh Series	Refreshes the current series.
Opinion Lines	Opens the “Opinion Line Selector” screen, allowing users to add or remove lines from the view.

Refresh Series

To refresh the data in the Viewer after running a process, such as DRP or a custom task, click the **Refresh Series** button. This will refresh any observations, series attributes, or the Series status.

- 1 Click the **Refresh Series** button in the **Options View** section of the **Views** menu.
- 2 You can also press the F5 key on your keyboard.
The data displayed in the panes is refreshed without selecting another series.

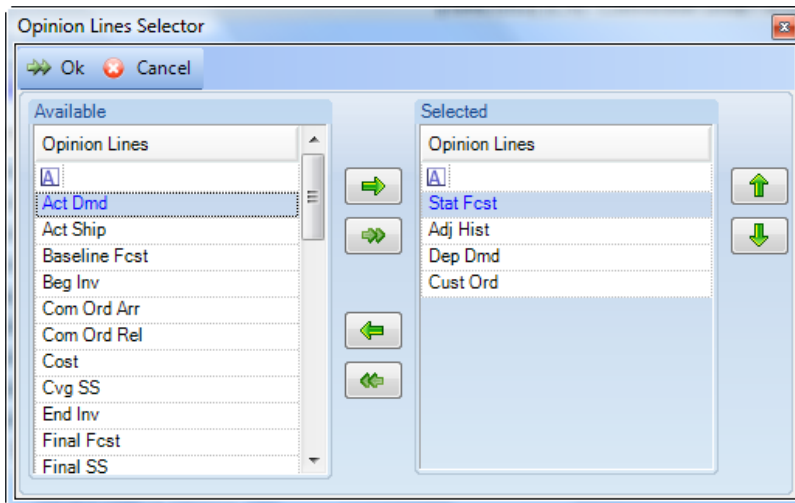
Add or Remove Opinion Lines in a View

There could be up to 24 different types of Opinion Lines on a graph. Each line represents a different data series. You can add or remove Opinion Lines in either the Graph View or Data View.

To select Opinion Lines to display in the Graph View or Data View:

- 1 Right-click in either the Graph View or the Data View and click “Select Opinion Lines to Show”. You can also click the **Opinion Lines** button in the **Options View** section of the **Views** menu.

The **Opinion Lines Selector** displays.



- 2 Select the Opinion Lines to display from the **Available** list and use the arrow buttons to move them to the **Selected** list.
- 3 You can also select lines and use the **Up** and **Down** buttons to change the order in which the lines are displayed.
- 4 Click **Ok** save your changes and return to the Viewer.
Click **Cancel** to exit without saving your changes.

The table below details what each Opinion Line means for the data series.

Table 4.5

Line	Description
Blue	History of the series (default).
Pink	Represents manual adjustments (measurements) made to the graph and displays previous values when changes are made.
Yellow	Forecast of the series (default).
Dotted Red	Represents where the history ends and the forecast starts (default).
Cyan	Represents the upper confidence limit.
Aqua	Represents the lower confidence limit.
Green	Represents safety stock.
Orange	Represents the level of error.

Table 4.5

Line	Description
Tan	Represents the original forecast before any changes are made.

Year

You can view the series data by year by selecting the **Year** option in the **Viewer Settings** section of the **Views** menu.

The column labels will be the Year (2003, 2004, 2005, and 2006) and the row labels depend on the cycle configurations that were previously set. The cycle must be set prior to loading the data for a forecast in order to take effect. If the dates are not set, the DME defaults to the Year View with the cycle set to monthly.

To view Year-to-Year Data:

- 1 Select the **Year** option in the **Viewer Settings** section of the **Views** menu.
- 2 Click a *cell of Historical data* to make changes.

Description	Base Fcst	Stat Fcst	Adj Dmd
2006-07	2,428	0	2,434
2006-08	2,501	0	2,501
2006-09	2,692	0	2,690
2006-10	2,425	0	2,423
2006-11	2,151	0	2,148
2006-12	2,086	0	2,079
2007-01	2,338	0	2,320
2007-02	2,514	0	2,507
2007-03	2,311	0	2,316
2007-04	2,573	0	2,583
2007-05	2,304	0	2,310
2007-06	1,861	0	1,853
2007-07	2,279	0	2,237

The following table details the data for this window.

Table 4.6

Feature	Description
Historical	Select which opinion line is used for past periods. These buckets will be read only.
Forecast	Select which opinion line is used for future periods. These buckets are editable in the list and display with a yellow background.
Start Period	From the drop-down arrow on the right-hand side, select Start Period then select a month from the drop-down list.
Growth Cycle	From the drop-down arrow on the right-hand side, set number of cycles back to compare growth to the current forecast.
Growth	Compare the previous forecast year with the current forecast year.
Min & Max	Minimum and maximum values between all years.

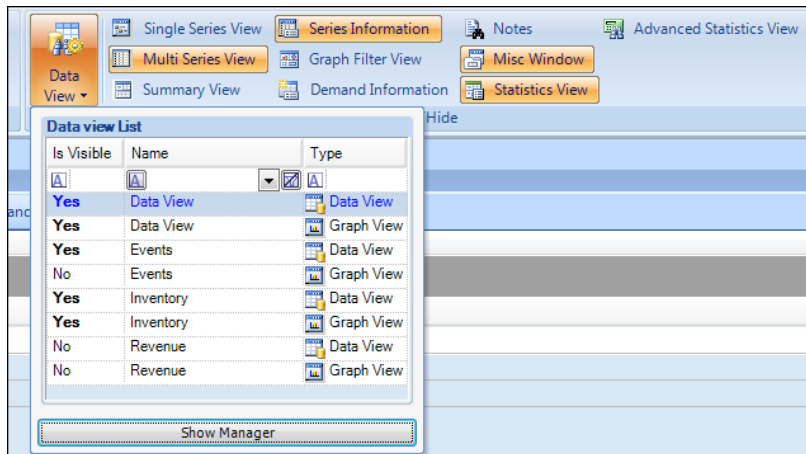
Table 4.6

Feature	Description
Total	Total value for the current year. You can edit the total value and they will be allocated accordingly to the different periods.

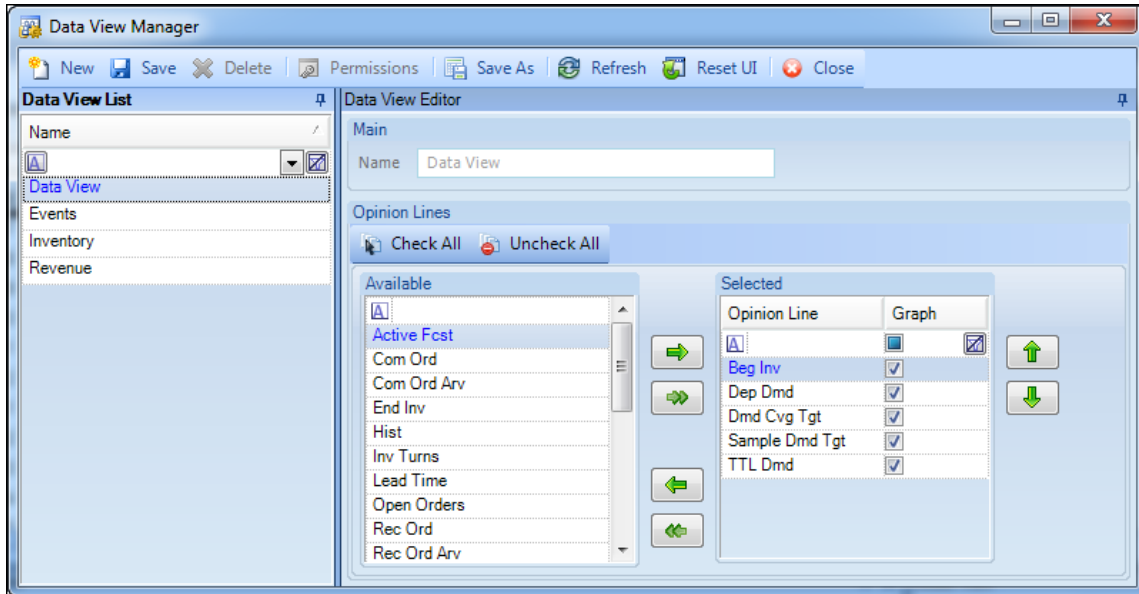
Views > Show/Hide > Data View

The **Data Views** drop-down allows you to select the specific views to include in your display. Each view consists of a Data and Graph View of the data. For each view, users can select the opinion lines that will display and assign them to either the Data or Graph View.

Select a view from the drop-down to add it to the view and change the **Is Visible** setting to “Yes”. Select the view again to remove it from the display.



To create custom views, click the **Show Manager** button at the bottom of the drop-down to access the **Data View Manager** window.



- 1 To create a new Data View, click the **New** button to clear the fields in the **Data View Editor** section for entry.
- 2 In the **Main** section, enter the **Name** of this view. This entry is what will display in the Data View drop-down.
- 3 In the **Opinion Lines** section, select the lines you want to display from the **Available** list.
- 4 Use the arrow buttons in the middle to move the selected lines to the **Selected** list.
- 5 Lines in the **Selected** list will display in the Data View version of the view being created. Select the check box in the **Graph** column to display these lines in the Graph View version of this view.
- 6 Use the **Up** and **Down** arrows to the right of the **Selected** list to choose the order in which these lines will display in the view.
- 7 Click the **Save** button.

Views > Show/Hide

The remaining buttons in this section are used to select which views and information boxes are displayed in the Viewer. Available options are:

Table 4.7

- | | |
|----------------------|----------------------------|
| • Single Series View | • Demand Information |
| • Multi Series View | • Notes |
| • Summary View | • Misc. Window |
| • Series Information | • Statistics View |
| • Graph Filter View | • Advanced Statistics View |

Click on any of these buttons to add that item to the current view. Selected items will display highlighted in orange. Click a highlighted item again to remove it from the current view.

Using Filters and Exceptions

Overview 96

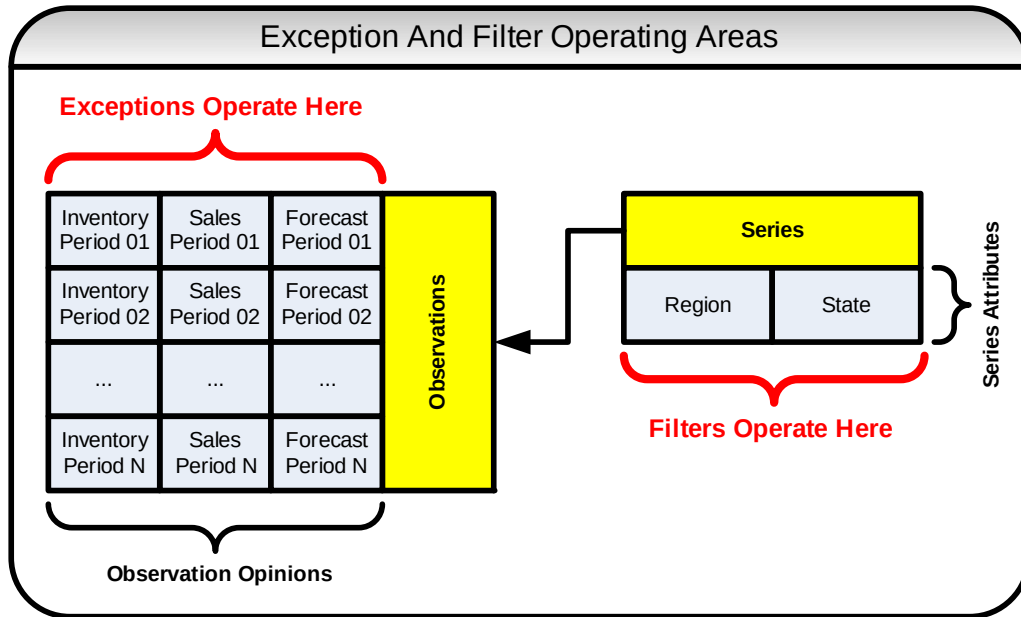
Filter Management 97

Exceptions Manager 108

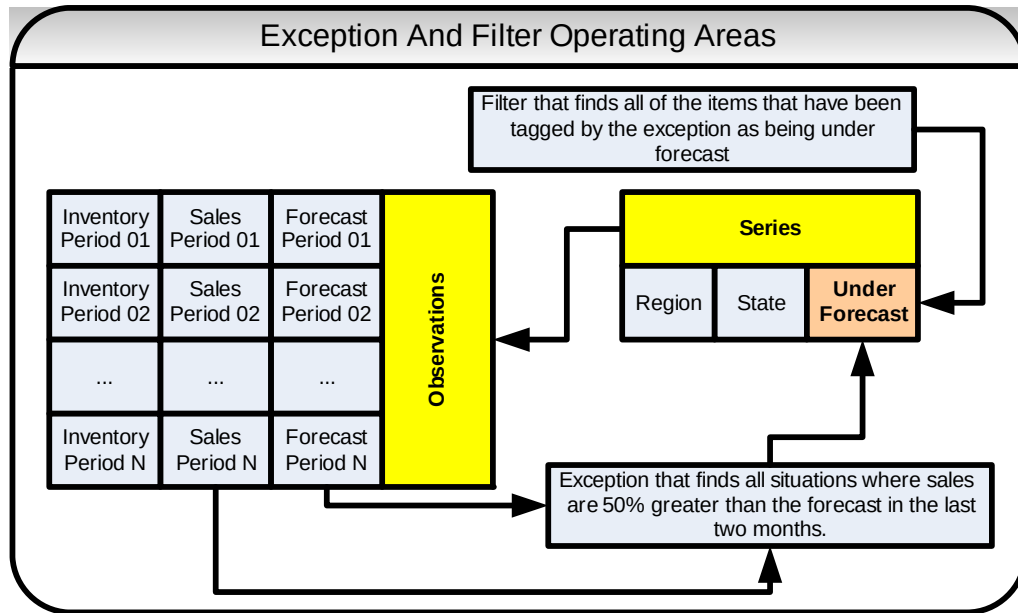
Overview

Filters and Exceptions provide users the ability to manage, control and identify forecasts. Using Filters and Exceptions improves the accuracy of the forecast by focusing on the items that have the greatest impact on the overall results. Filters provide the ability to select the items displayed based on series attributes. Exceptions provide the ability to select items based on the numerical information that is stored in observations. By using these two features within the DME, you can manage the forecast in a very effective manner.

The figure below details how Filters and Exceptions interact:



It is important to note that Exceptions have an additional feature that enables you to update attributes within the series. This way, when an Exception is run, the results of the Exception are stored so that they can be accessed later using a filter. The illustration below details the interaction between Exceptions and Filters.



In this case, the Exception flags the items by setting the series attributes. Once the attribute has been set by the Exception, a filter is then used to select the series at any point in time. If the attribute is made editable, then users are able to replace the flag, which then removes it from the filter so that the item no longer displays. This allows the System Administrator to set Exceptions and allows the users to clear them.

Filter Management

You can specify particular groups or sections of data to view in DME through the use of filters. Filters enable you to perform quick analysis on specific pieces of data.

Each Filter contains a Filter Expression defined by the user. Prior to creating a filter, you must understand how the DME defines that Filter Expression.

When using filters, remember that a user's Data Permissions are taken into account. So if the user does not have access to certain data, that data will not be returned by a filter even if it fits in the parameters of the filter expression.

Filter Expression

A Filter Expression is a combination of fields, operators, and values which indicate to the DME the specific data to display in the Viewer.

A Filter Expression has the format of:

Field Name Logical Operator Data Value

Example 1

In your source data, you want to display only the items that BIG MART purchases in the Midwest.

The filter expression would look like this:

Customer= “BIG MART” AND Region= “Midwest”

In this example, the Field Name is Customer, the operator is = and the Data Value is BIG MART.

Example 2

Your source data lists all employees, their departments, and start dates. You want to know how many people started in the Marketing and Sales departments in the year of 1999. You can build a filter expression that tells the DME to look at dates in 1999 and employees in the Sales or Marketing departments.

The filter expression would look like this:

***Start Date >= ‘%1/1/99%’ AND Start Date <= ‘%12/31/ 1999%’ AND
(Dept = Sales OR Dept = Market)***

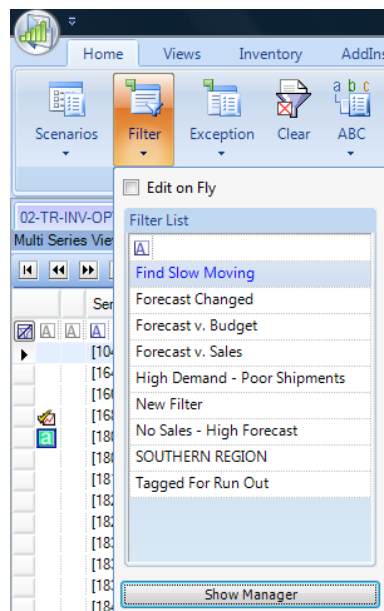
Create a Filter

DME provides two methods for creating a filter expression: Basic Filters and Advanced Filters.

The Basic Filter feature allows you to build your filter expression by using drop-down lists to select your criteria and operators.

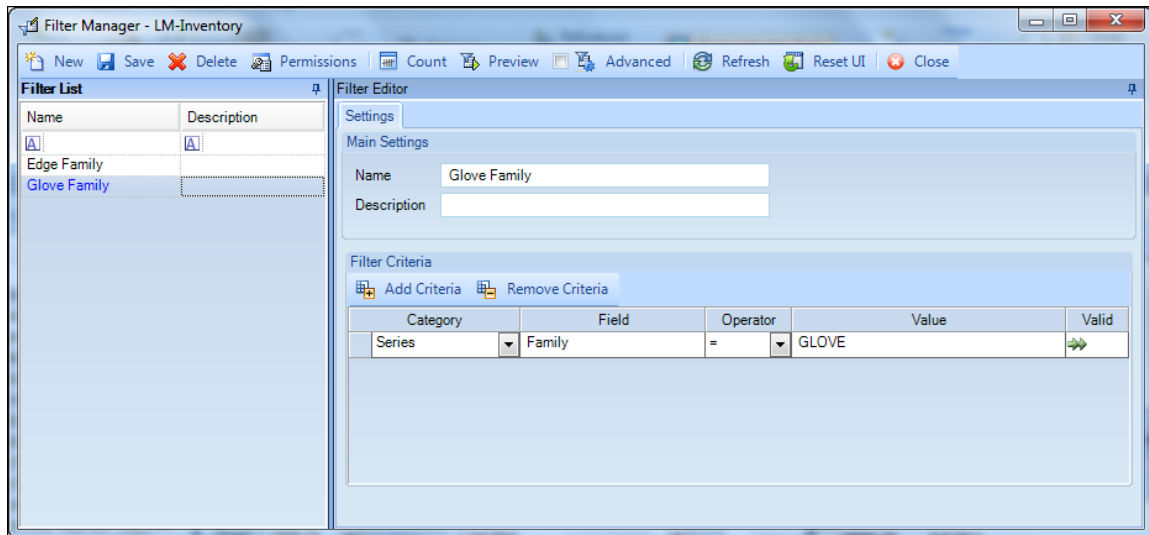
Advanced Filters allow you to manually enter your filter expression as SQL code and provides buttons to insert basic operators such as “AND” or “OR” into your statement. To use the Advanced Filter, select the **Advanced** check box in the toolbar of the Filter Editor.

- 1 On the **Home** tab, click the **Filter** icon to open the drop-down list.

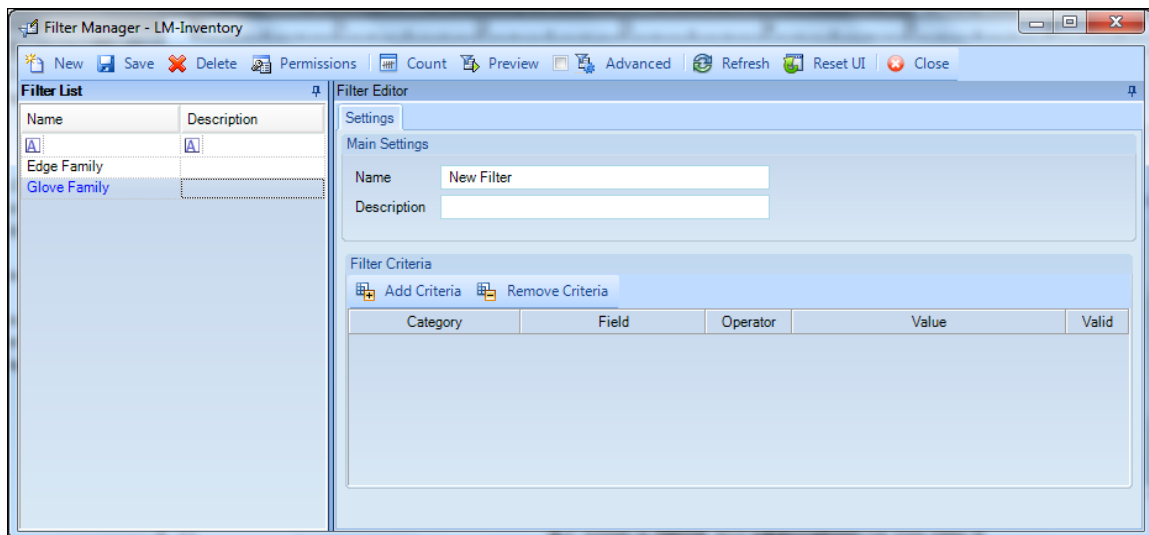


- 2 Click the **Show Manager** button.

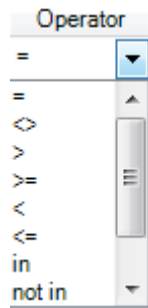
The **Filter Manager** displays.



- 3 Click the **New** button. The fields in the **Filter Editor** are cleared for entry.



- 4 Enter a **Name** and **Description** for this filter.
- 5 Click the **Add Criteria** button. A new row is added to the **Filter Criteria** grid.
- 6 Select the **Category** of this filter from the drop-down list. Possible values are Series, Scenario, Statistics Values, and Custom.
- 7 Use the **Field** drop-down to select the field on which you want filter. The values in the Field drop-down will vary based on the selected Category.
- 8 Click the **Operator** drop-down list and select the operator.

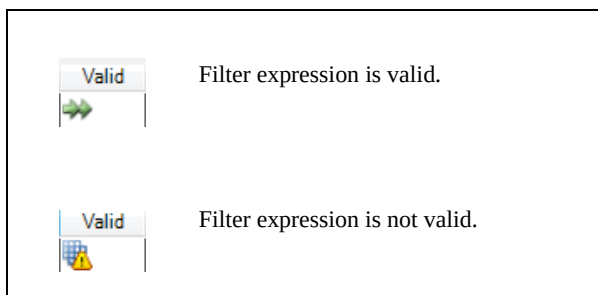


The operators are:

- = Equal to
- <> Not equal to
- > Greater than
- < Less than
- >= Greater than or Equal to
- <= Less than or Equal to
- In (Included in a list of values)
- Not In (Not included in a list of values)
- Like (Any values containing the entered criteria)
- Not Like (Any values containing the entered criteria)

9 Click the **Values** drop-down field. Any values that coincide with the selected Field will display in the Values drop-down list.

10 The **Valid** field will indicate if this filter expression is valid.



11 Click the **Count** button to calculate how many Series would be returned by applying this filter to the current scenario.

12 Click the **Parse Expression** button to verify that the filter expression is valid. If the filter expression is not valid, an error message displays.

13 Click the **Preview** button when you are finished building the expression and the filter results display on a new tab

Filter Editor

Settings Preview

Export to Excel File

Drag a column header here to group by that column.

Description	Rank	Price	Cost	InitBackLog	InitOnHand	MinOrder
[1807455C92]		29.99	0	0	1695	2165
[1818402C2]		0.29	0	0	24636	41519
[1825181C91]		2.83	0	0	3103	4589
[GEH5054]		6.33	0	0	1238	2195
[ZBJ52772]		2.59	0	0	1469	1877
[ZJB235101G]		9.93	0	0	15026	22064

14 Click the **Export to Excel File** button to save these filter results as a spreadsheet.

15 Click **Save** when finished. The filter now displays in the Filter List.

Advanced Filters

In the Filter Editor window, select the **Advanced** check box to switch to the Advanced Filter mode:

- 1 Click the **Add Criteria** button to add a condition and a new row is added to the filter just as it was in the Basic Filter mode.

However, once you select the criteria, it displays as a SQL statement in the Advanced Filter section.

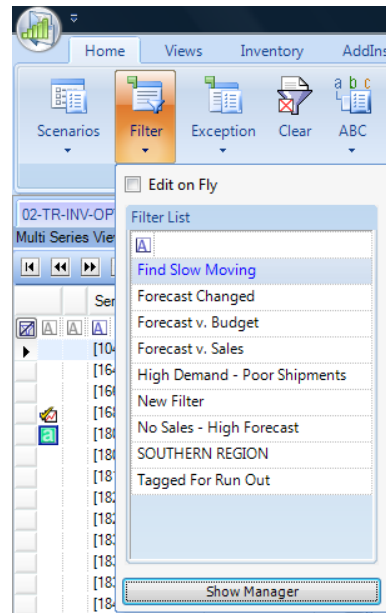
The screenshot shows the 'Filter Editor' window. It has a 'Settings' tab and a 'Main Settings' section with fields for 'Name' (containing 'High Demand - Poor Shipments') and 'Description'. Below this is the 'Advanced Filter' section, which includes buttons for 'Add Criteria', 'AND', 'OR', '(', and ')', and a 'Clear Advance Filter' button. A text area below these buttons contains the SQL statement: `[UserValue03] > 20000 AND [Series].[UserField3] = 'Ships v Demand > 20%'`.

You can use the “AND”, “OR” and parenthesis buttons to add to the SQL statement. You also can manually enter any valid ANSI SQL statements using the columns and data in your data source.

- 2 As you work with your filter, you can still click the **Preview** button to view the resulting data or click **Parse Expression** to see if your filter expression is valid.
- 3 Click the **Save** button when finished.

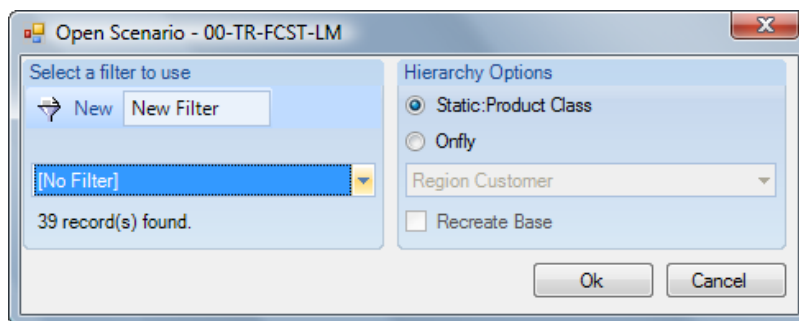
Apply a Filter

You apply a filter to any Scenario, by clicking the **Filter** icon on the **Home** menu to open the drop-down.



After the filter executes, the DME displays the results of the Filter Expression.

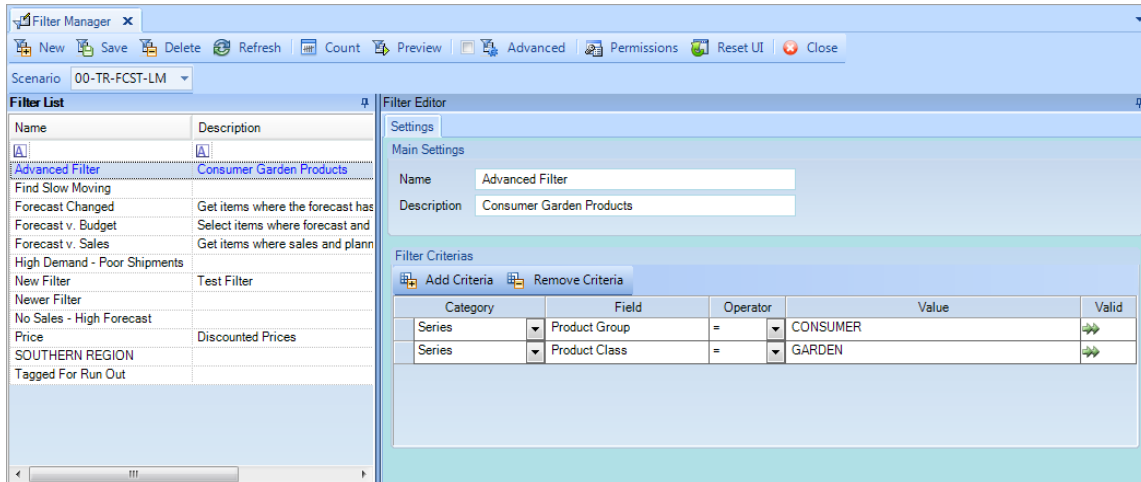
You can also apply a filter when opening a Scenario. The **Open Scenario** window contains a filter drop-down that allows you to apply an existing filter to this scenario.



The record count below the filter drop-down indicates how many records would be returned by applying the selected filter to this scenario.

Edit a Filter

- 1 In the **Filter Manager** window, select the filter to modify.
The filter details display in the **Filter Editor** tab displays.

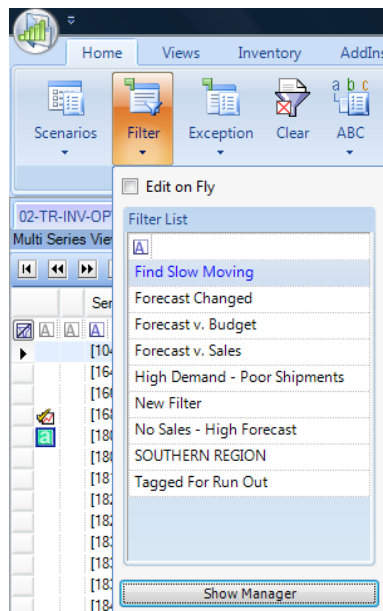


- 2 Make any necessary changes to the filter and click the **Parse Expression** button to make sure the filter expression is valid.
- 3 Click **Save** to update the filter.

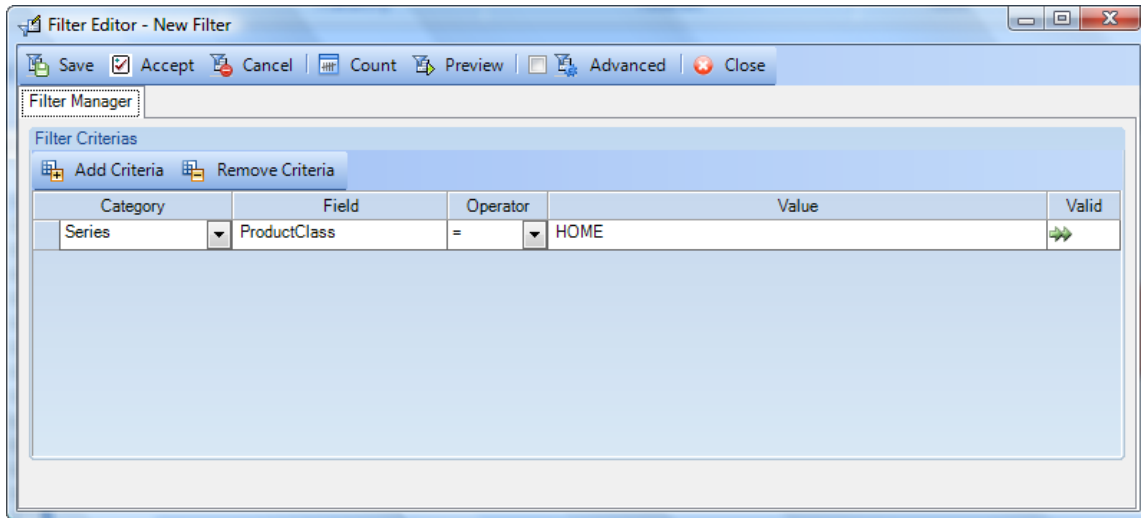
Edit the Filter “On the Fly”

For quick changes, the Filter Expression can be changed on the fly. A user has the option of editing the filter just before it is run in the Viewer. Use the **Edit on the Fly** checkbox on the **Filter** menu to make changes without modifying the original Filter Expression.

- 1 On the **Home** menu, click the **Filter** icon to open the drop-down.



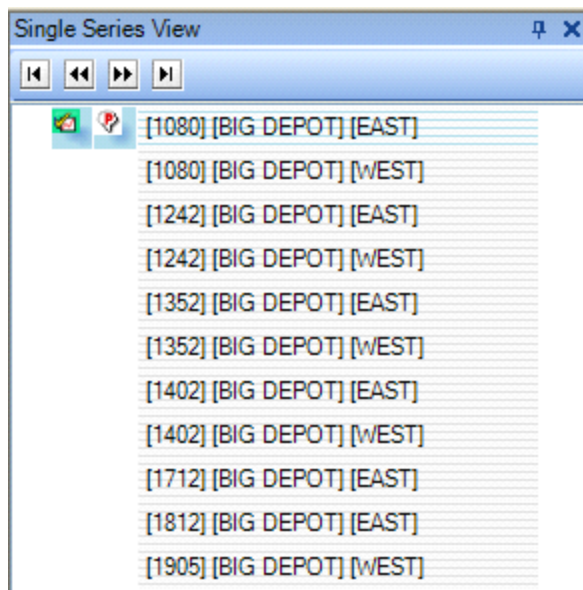
- 2 Select the **Edit on Fly** checkbox and then select the filter you want to edit. The Filter Editor window displays the selected filter.



- 3 Make any necessary changes to the filter criteria.
- 4 Click the **Parse Expression** button to verify that the filter expression is valid.
- 5 Click the **Preview** button to view the filter results.
Note These changes are not saved. The updated Filter Expression is only used for this execution at this point in time. You have to make changes and save them in the original Filter Expression saved in the Viewer.
- 6 Select the **Accept** check box and click **Save** to save this filter with your new criteria.
- 7 Click the **Cancel** button to close the Filter Editor without saving your changes.

Example

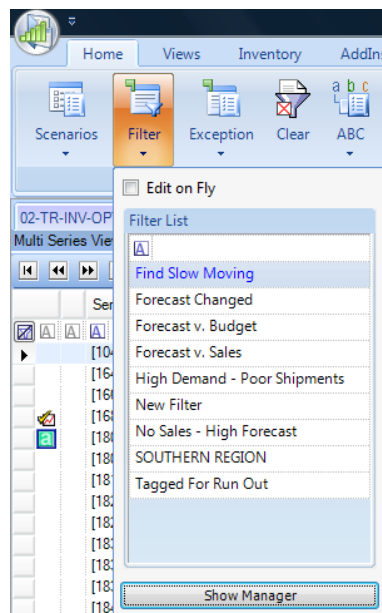
Assume that you have a filter that displays only items where the customer is BIG DEPOT. The following window displays an example of the filtered results in the Single Series View.



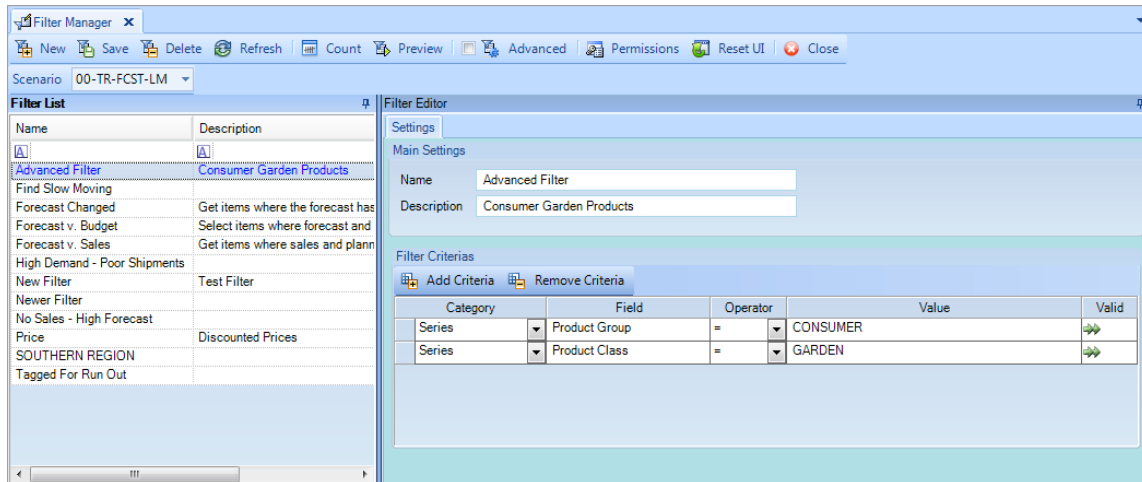
Share a Filter

Users can share filters they have created with other users and allow them to apply the filter to their Scenarios. Users cannot share or edit filters that have been shared them.

- 1 On the **Home** menu, click the **Filter** icon to open the drop-down.

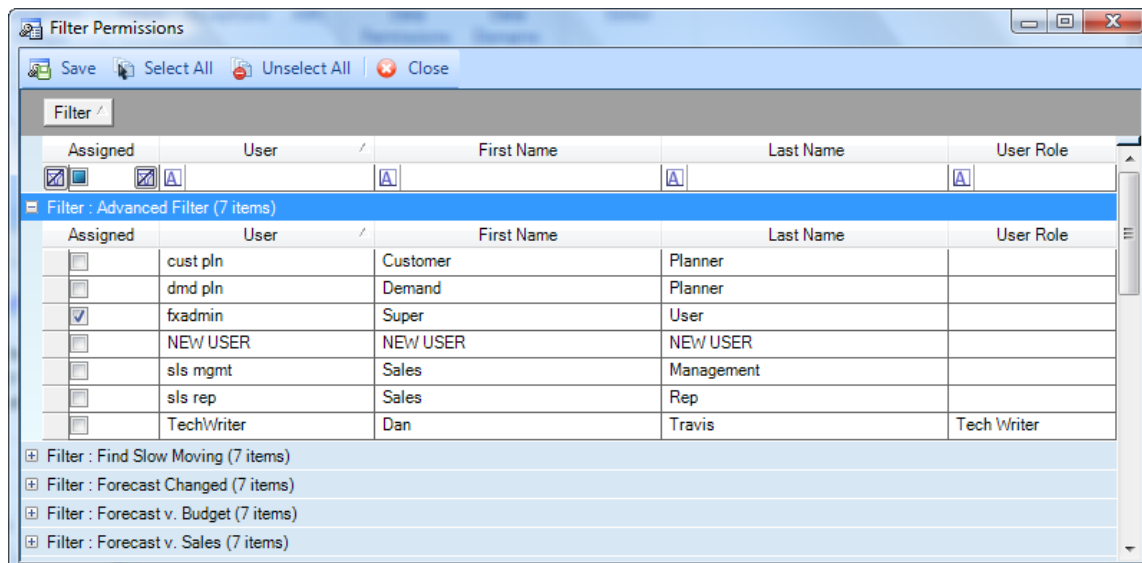


- 2 Click the **Show Manager** button.
The **Filter Manager** window displays.



- 3 Select the filter to share and click the **Permissions** button.

The **Filter Permissions** window displays.



- 4 Use the checkboxes in the **Assigned** column to select the user with whom you want to share this filter.
- 5 Click **Save**. The selected users can now apply your filter to their Scenarios.

Delete a Filter

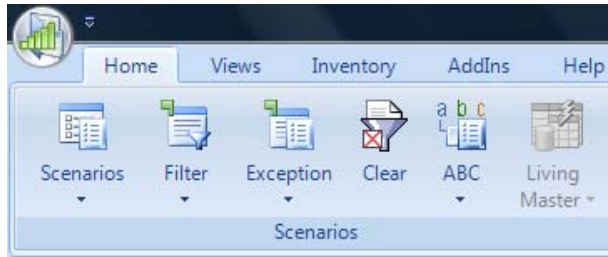
- 1 In the **Filter Manager** window, select the filter to remove and click the **Delete** button.
- 2 The DME will prompt you to confirm the deletion.
- 3 Click **Yes**. The filter is deleted and no longer displays on the Filter List.

Deactivate a Filter

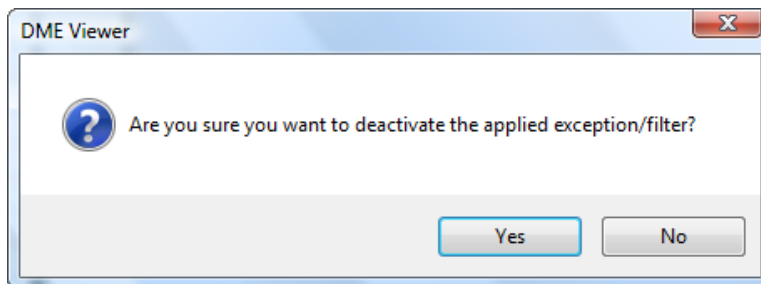
A Scenario is only affected by one filter at a time. To apply another filter, the original filter must be deactivated in order to return the Scenario to the original state.

Note You can use one filter with many Scenarios. However, a Scenario may only have one filter.

- 1 In the **Scenarios** section of the **Home** Ribbon, click the **Clear** button.



- 2 DME asks you to confirm that you want to remove the filter.



- 3 Click **Yes**.

Exceptions Manager

Overview

The term Exception refers to applying a business rule that filters out any items that meet certain criteria.

Exceptions capture abnormal items before the data values reach a certain threshold. You must define Exceptions before each forecast cycle. Identifying and removing exceptions enables you to focus your attention on this specific forecast area.

The Exceptions Manager consists of two tabs: Definition and Preview. The Definitions tab is used to define the characteristics of the Exception, while the Preview tab is used to indicate how the data affected by the Exception is handled by the Viewer.

Main Settings

The **Main Settings** section of the Definitions tab allows you to enter basic information such as the **Name** and **Description** for the Exception being created.

Table 5.1 Main Settings

Field	Description
Name	Name for the Exception being created.
Description	General description of the Exception being created.
Exception Result	Allows you to select one of two options for the output from this exception: • Compute Value: Output the calculated value of the variance or percentage variance to a numeric Series Information field for each matching series. • Exception Name: Output the name of the Exception to a field in the Series Information panel of the Viewer.
Output Field	Used to select the field where the resulting “Compute Value” or “Exception Name” is stored. This information can be viewed in the Series Information panel in the Viewer. The options available in this drop-down list will vary based on the selected Exception Result.
Reset OutPut Field	Indicate whether or not the DME should overwrite existing values in the selected Output Field.

Base Opinion Line

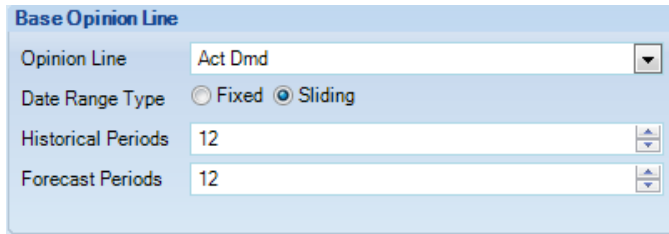
The **Base Opinion Line** section allows you to indicate which existing Opinion Line to use as a base for this exception. Only one base Opinion Line can be selected and this data is compared to the criteria by the Exception calculation.

Date Range Type

Use the **Date Range Type** field to select either a Fixed or Sliding date range. The fields below the radio buttons will change based on your selection.

The “Fixed” option allows you to specify a fixed date range using **Start Period** and **End Period** drop-downs.

The “Sliding” option allows you to set the number of **Historical** and **Forecast Periods** to create the range.



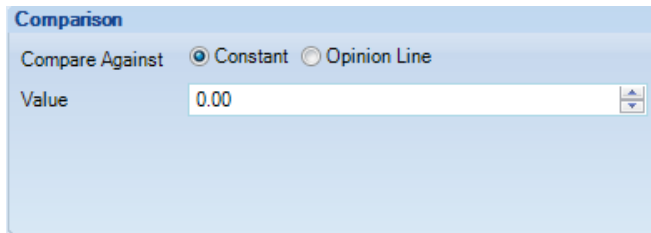
The **Base Opinion Line** window contains the following fields:

- Opinion Line:** A dropdown menu with "Act Dmd" selected.
- Date Range Type:** Two radio buttons, "Fixed" and "Sliding", with "Sliding" selected.
- Historical Periods:** A numeric input field with the value "12".
- Forecast Periods:** A numeric input field with the value "12".

Comparison

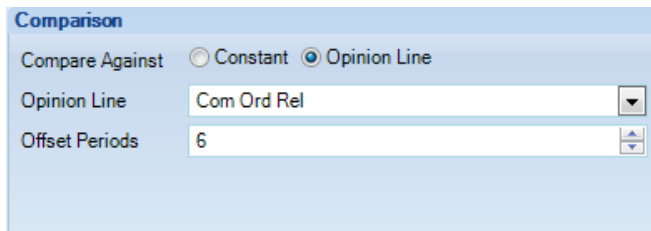
The **Comparison** section uses the **Compare Against** radio buttons to choose the type of comparison. There are two ways to do the comparison and the fields below will change based on your selection.

Select the “Constant” option to display the **Value** field, allowing you to compare against a specific threshold. Using this option will compare the base opinion against the number in the **Value** field.



The **Comparison** window shows the "Constant" option selected under **Compare Against**. The **Value** field is a numeric input field containing "0.00".

Select the “Opinion Line” option to display the **Opinion Line** and **Offset Periods** fields. Using this option compares the Base Opinion Line against another Opinion Line.



The **Comparison** window shows the "Opinion Line" option selected under **Compare Against**. The **Opinion Line** field is a dropdown menu with "Com Ord Rel" selected. The **Offset Periods** field is a numeric input field with the value "6".

The **Offset Periods** field allows you to indicate which periods of the two opinion lines are compared against each other. For example, selecting “6” offset periods allows you to compare the next six periods of the selected opinion line against the previous six periods of the Base Opinion Line.

Exception Definition

The **Exception Definition** section contains information used to define the buckets and comparison methods used in this exception. This section also allows you to create a filter expression to apply to one of the Comparison Methods (“Method inside Buckets” or “Method outside Buckets”).

Table 5.2 Exception Definition

Field	Description
Periods in Bucket	The number of periods in this bucket. A bucket is a logical unit which groups periods together. For example, if the data is monthly, and you specify the number of Periods in the Bucket as “3”, you are grouping your data into 3 month buckets and doing a quarter by quarter comparison.
Method inside Buckets	Select the aggregate methods for grouping the data within a bucket. Possible values are: • Sum - Add all values. • Average - The average of all values. • Min - Select the lowest value. • Max - Select the highest value.
Calculate	Select the comparison method to use in this Scenario. Possible values are: • % Absolute Variance - The difference between the values and the thresholds or another Opinion Line. That difference may be positive or negative. • % Variance - The percentage of the difference between the values and the threshold or another Opinion Line. The equation is: $(a - b)/b \times 100\%$ Where a is the threshold and b is the value of the base line. • Absolute Variance - The absolute difference between the values and the thresholds or another Opinion Line. This difference is always positive. • Variance - The absolute percentage of the difference between the values and the threshold or another Opinion Line.
Method outside Buckets	Select the aggregate method to use for data that is not included in a bucket. Possible values are: • Sum - Add all values. • Average - The average of all values. • Min - Select the lowest value. • Max - Select the highest value.
Condition Type	Defines the expression which compares the Method against the expression.

Design Model Sample Data

The **Design Model Sample Data** panel displays a preview of the Exception based on the current settings. As you enter or change the settings for the Exception, the data in the Design Model will be updated.

The totals for the Base Opinion Line and the Comparison selection are displayed below each row using the selected method. In the example below, these totals are displayed in the “Sum” field. The Design Model panel also includes a total for the Exception with the Calculation applied, as shown below in the “Abs % Variance” field.

Design Model Sample Data												
Monthly	2008-11	2008-12	2009-01	2009-02	2009-03	2009-04	2009-05	2009-06	2009-07	2009-08	2009-09	2009-10
Com Ord Ar	14.00	28.00	42.00	56.00	70.00	84.00	98.00	112.00	126.00	140.00	154.00	168.00
	Sum											1,092.00
UserValue02	29.00	58.00	87.00	116.00	145.00	174.00	203.00	232.00	261.00	290.00	319.00	348.00
	Sum											2,262.00
Abs %Variance											6,844.50	
Result(Sum)											6,844.50	

There is also a grand total for the Exception at the very bottom of the panel that is also based on the selected method. In the example above, this total displays in the “Result (Sum)” field.

The Design Model also provides these totals for each bucket in an Exception. In the example below, the Exception contains three periods per bucket, so the Design Model lists the totals for each bucket.

Design Model Sample Data														
Monthly	2009-11	2009-12	2010-01	2010-02	2010-03	2010-04	2010-05	2010-06	2010-07	2010-08	2010-09	2010-10		
MaxEventValue	8.00	16.00	24.00	32.00	40.00	48.00	56.00	64.00	72.00	80.00	88.00	96.00		
	Avg			16.00	Avg			40.00	Avg			64.00	Avg	
Act Fost	17.00	34.00	51.00	68.00	85.00	102.00	119.00	136.00	153.00	170.00	187.00	204.00		
	Avg			34.00	Avg			85.00	Avg			136.00	Avg	
Abs %Variance			1.62	Abs %Variance			10.12	Abs %Variance			25.92	Abs %Variance		49.00
Result(Avg)												21.67		

Preview

The **Preview** tab allows you to select how data is handled in the Viewer when the Exception is applied. For example, you can choose to display only items meeting the Exception criteria or to display all items while highlighting items meeting the Exception criteria.

Action Profilers

The **Action Profilers** section of the Preview tab consists of four check boxes. The first two check boxes, “Limit List” and “Flag Exception”, are used to indicate what happens when an Exception occurs. Only one of these options can be selected a time.

The second check boxes, “Color” and “Email” are used to indicate how Exceptions are noted. Selecting either of these options will activate the corresponding sections of the screen below. The “Color” and “Email” items can both be selected at the same time.

Email

Table 5.3 Preview Tab - Action Profilers

Action	Description
Limit List	Selecting this option instructs the Viewer to display only items meeting the Exception criteria.
Flag Exception	Selecting this option instructs the Viewer to display all items, but to flag any items meeting the Exception criteria.
Color	Select this option to highlight Exceptions in the Viewer and make them easier to locate.
	Selecting this option will activate the Color section below and allow you to choose the color used to highlight the Exception.
Email	Select this option to send an email to a specified account whenever an Exception occurs.
	Selecting this option will activate the Email section below and allow you to set your email preferences.

The **Email** section allows you to enter the email address and options for sending Exception notifications. This section will only be active is the “Email” option is selected in the Action Profilers section above.

Color

Table 5.4 Preview Tab - Email Options

Field	Description
From	The email address from which the notification will be sent.
To	The email address to which the notification will be sent.
Subject	The default subject line of the email notification.
Include Record Count	Select this option to include the number of records affected by the Exception in the email.
Include Series Detail	Select this option to include the series information for the records affected by the Exception in the email.
Include Definition	Select this option to include a definition of why the Exception occurred.

The **Color** section allows you to choose the color used to highlight Exceptions in the Viewer. Highlighting items affected by the Exception makes the items easier to find. This section will only be active if the “Color” option is selected in the Action Profilers section above.

Users can select different colors to help differentiate between Exceptions to the Opinion Line, Compare Opinion, or Output Field.

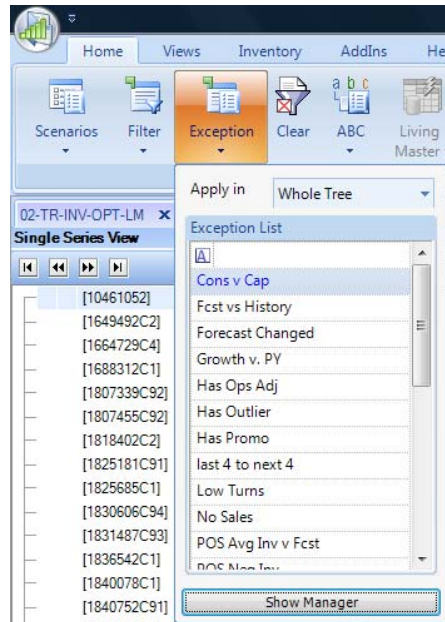
Type	Field	Color
Opinion Line	MaxEventValue	Yellow
Compare Opinion	Act Fcst	Yellow
▶ Output Field	Gen Txt Exception	Yellow

Table 5.5 Preview Tab - Color Options

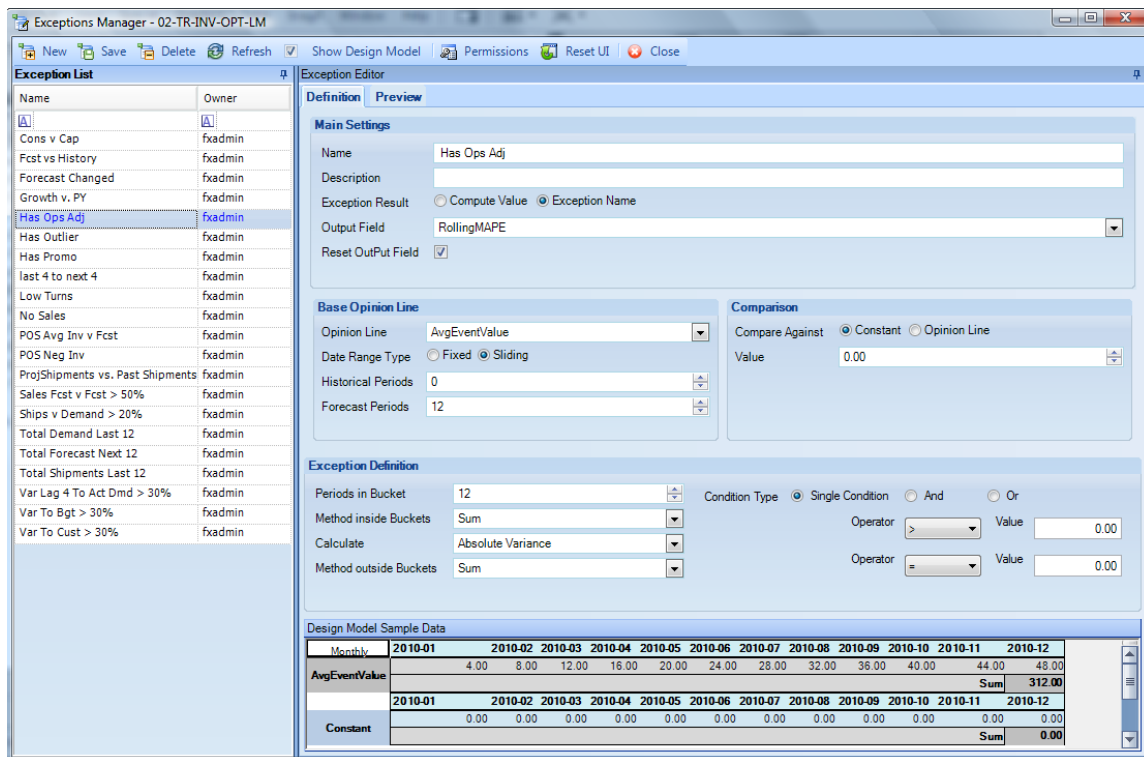
Field	Description
Type	Indicates the object for which you are selecting the highlight. Possible values are Opinion Line, Compare Opinion, and Output Field.
Field	Indicates the currently selected value for each Type on the Description tab.
Color	Drop-down list allowing you to select the color used to highlight the Exception. This drop-down contains three tabs: • Custom - Choose your own color from the palette. • Web - Commonly used colors. • System - Colors used within the system.

Create an Exception

- 1 On the **Home** menu, click the **Exception** icon to open the drop-down.



- 2 Click the **Show Manager** button.
The **Exceptions Manager** window displays.



- 3 Click the **New** button.

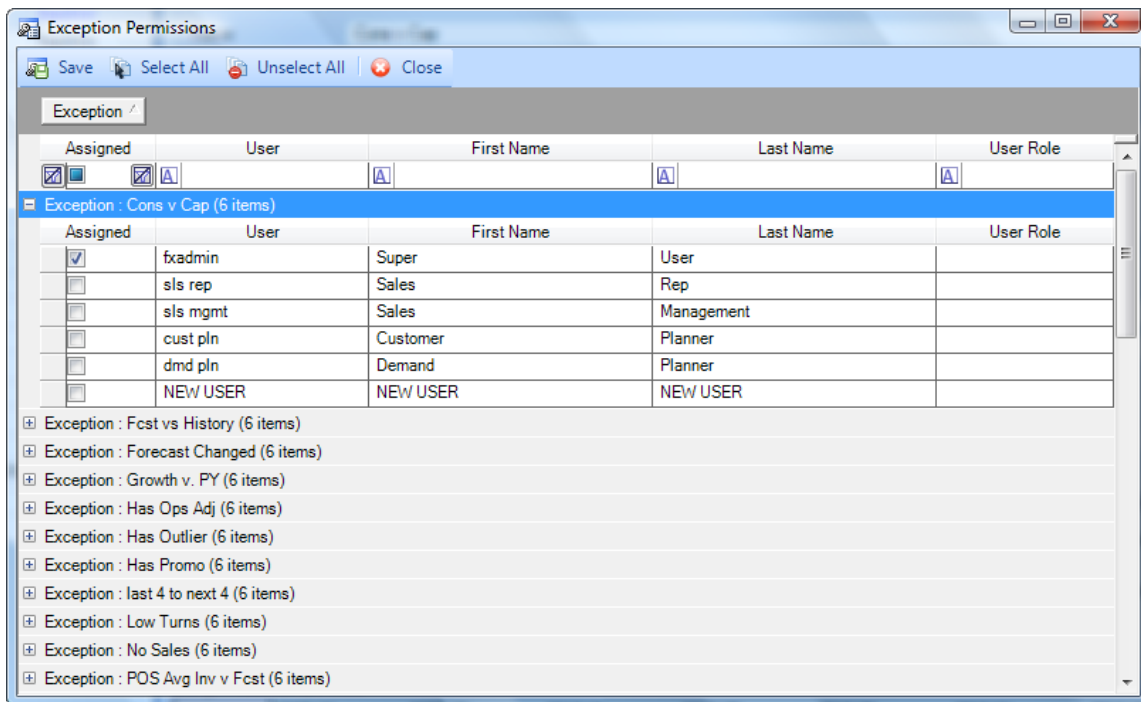
All fields on the **Definition** tab are reset and cleared.

Share an Exception

1 In the **Exceptions List**, select the exception that you want to share.

2 Click the **Permissions** button.

The **Exception Permissions** window displays.



3 Use the checkboxes to select the users with whom the exception will be shared.

4 Click **Save**.

Delete an Exception

1 On the **Exceptions List**, select the exception to delete.

2 Click the **Delete** button.

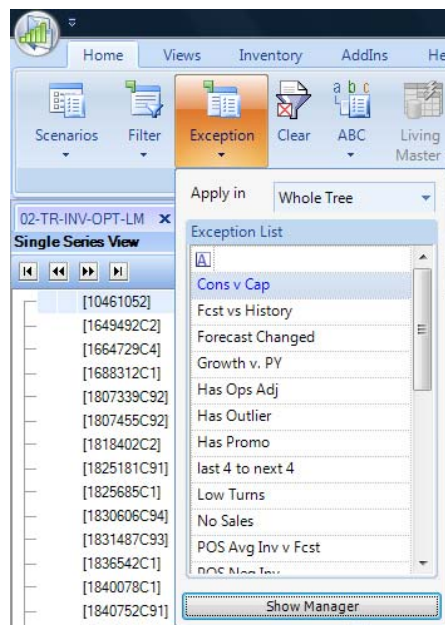
DME will prompt you to confirm the deletion.

3 Click **Yes**.

The Exception is deleted and no longer displays in the Exception List.

Apply an Exception

- 1 On the **Home** tab, click the **Exception** icon to open the drop-down list.



- 2 From the **Apply In** drop-down, select “*Whole Tree*” to apply the exception to every Scenario (levels) in the current hierarchy.
The “*Whole Tree*” option is disabled if there is not a hierarchy applied to current Scenario or if the Scenario has an On-Fly hierarchy applied.
- 3 You can also use the **Apply In** drop-down to select an individual *scenario* and only apply the exception to that one Scenario.
- 4 Select an Exception from the list.
The Exception is automatically applied to the current scenario.

Chapter 6

ABC Analysis

Overview **120**

ABC Template Management **121**

Overview

ABC Analysis enables you to group a set of data into buckets based on the value of the Forecasted items. After the items are tagged and coded, you can filter on the items to focus on those that have the largest impact on the business. The following diagram depicts the methodology for ABC coding items based on Forecast error.

	Shirts		Pants		Shoes	
Date	Actual	Forecast	Actual	Forecast	Actual	Forecast
2003-01	40	44	51	49	1,743	1,764
2003-02	60	62	91	89	1,863	1,868
2003-03	20	21	39	39	1,394	1,447
2003-04	10	10	10	10	14	14
2003-05	10	11	17	16	65	67
2003-06	40	42	64	58	3,695	3,849
2003-07	50	54	69	68	390	396
2003-08	70	75	94	89	1,859	1,884
2003-09	80	95	96	87	6,721	6,752
2003-10	80	84	115	104	1,531	1,552
2003-11	120	127	124	115	2,907	2,960
2003-12	50	59	78	78	6,065	6,085
Total	630	684	849	802	28,247	28,639
Error		(54)		47		(391)
Abs Pct Error		8.53%		5.53%		1.39%
Ranking On Error		B		C		A
Ranking On Abs Pct Error		A		B		C

As depicted in this example, the method by which the ABC Analysis assigns its values impacts the items that would receive the largest amount of review.

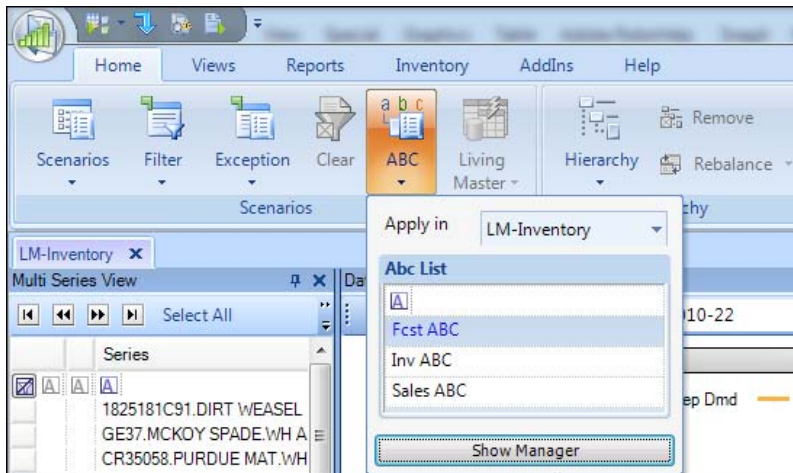
You can view the categorized data by total value and percentage of the total value over a specified time. For example, the items can be categorized as the top percentage of products or A-items, the second percentage of items or B-items, the third percentage of items or C-items, or the bottom-dollar percentage.

The result of the ABC calculation is a field populated with the appropriate ranking; the user may create a filter in order to focus on a particular group of ranked products that require the most attention.

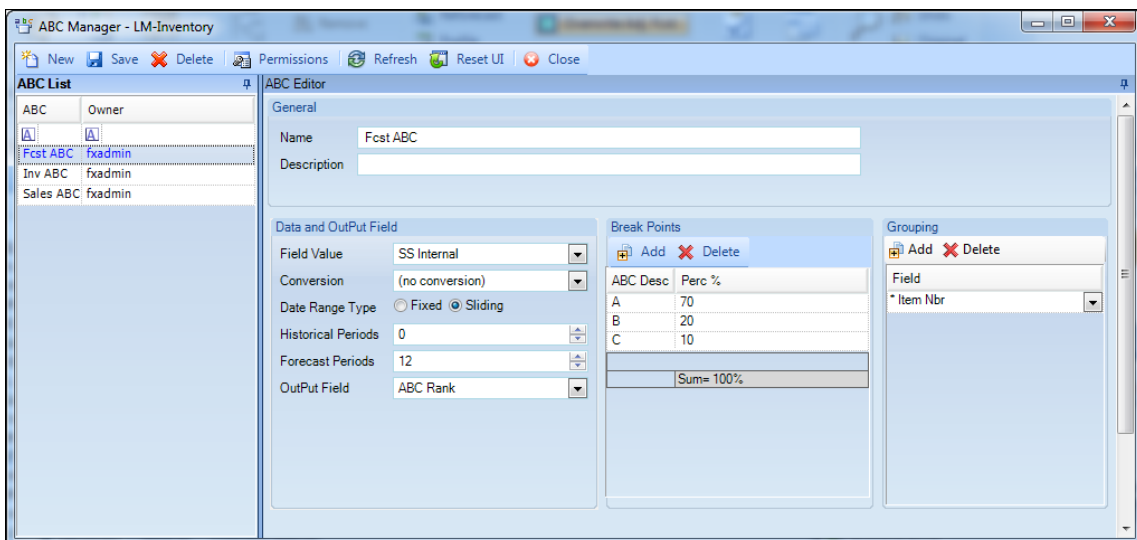
ABC Template Management

Create an ABC Template

- 1 On the **Home** menu, click the **ABC** icon to open the drop-down.



- 2 Click the **Show Manager** button.
The **ABC Editor** window displays.

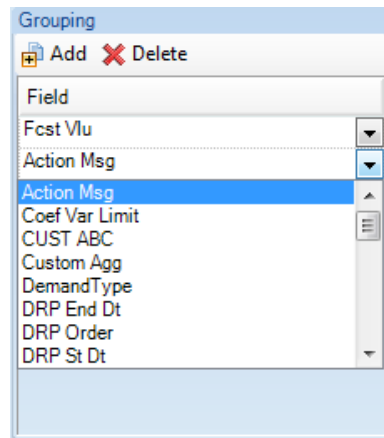


- 3 Click the **New** button. A new template is added to the **ABC List** and the fields in the **ABC Editor** are cleared

- 4 Enter a **Name** and **Description** for this template in the respective text boxes.
- 5 In the **Data and OutPut Field** section, select a data field from the **Field Value** drop-down list. This field is the basis of the ABC calculation.
- 6 Select a *conversion* (or *no conversion*) from the **Conversion** drop-down list. If conversion factors are loaded (i.e., price, units, tons, pallets or others), select the appropriate Opinion Line.
Note If you select a conversion factor other than (no conversion), the ABC template uses the value (Data Field * Conversion) to do the ABC calculation instead of the value in Data Field.
- 7 Select the **Date Range Type** using the “Fixed” and “Sliding” radio buttons.
- 8 Select the months to use for the date range from the **Start Period** and **End Period** fields.
- 9 Select the **Output Field** from the drop-down list.
- 10 In the **Break Points** section, make any necessary changes to default values.

- 11 Click the **Add** button to add another new group and percentage.
- 12 Enter the *group name* in the **ABC Desc** textbox.
- 13 Enter a *percentage* for each group in the **Perc %** textbox.
Note The total of all percentages entered in the Perc % fields must equal 100%.

- 14 In the **Grouping** section, click the **Add** button to insert a new row in the grid below.
- 15 Select the field you want to use to group data in analysis from the drop-down list.



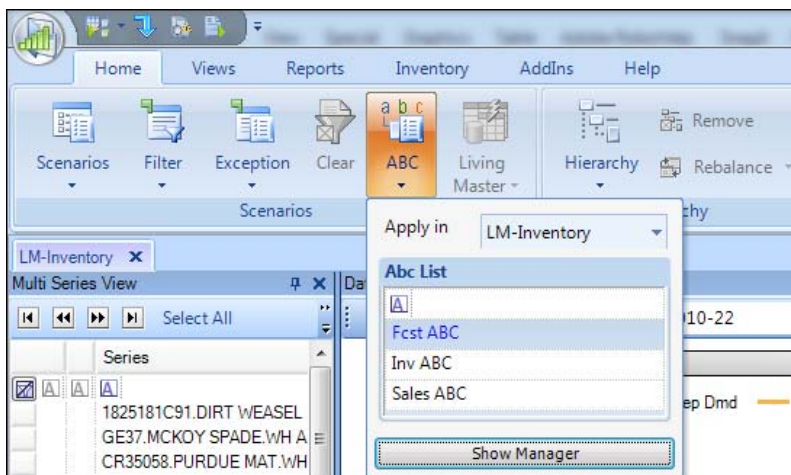
- 16 Repeat these steps to add more fields for grouping.

Note The DME uses these fields as a group and uses each group as a unit in the analysis. All series belonging to the same group will have the same ABC analysis category. For example, if the fields selected from the Grouping drop-down list are “Region” and “Customer”, each Region-Customer combination is given a ranking.

- 17 Click **Save** to save this template.

Run ABC Template

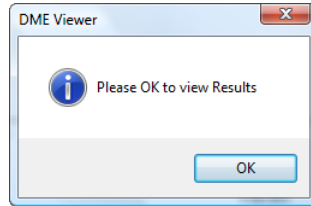
- 1 On the **Home** menu, click the **ABC** icon to open the drop-down.



- 2 From the **Apply In** drop-down, select “*Whole Tree*” to perform the ABC analysis on every Scenario (levels) in the currently applied hierarchy. The “*Whole Tree*” option is disabled if there is not a hierarchy applied to current Scenario or if the Scenario has an On-Fly hierarchy applied.

- 3 You can also use the **Apply In** drop-down to select an individual *scenario* and only apply the ABC analysis to that one Scenario.
- 4 Select the *template* from the **ABC List** drop-down.

When the ABC analysis finishes, the following message displays.



- 5 Click **OK**.

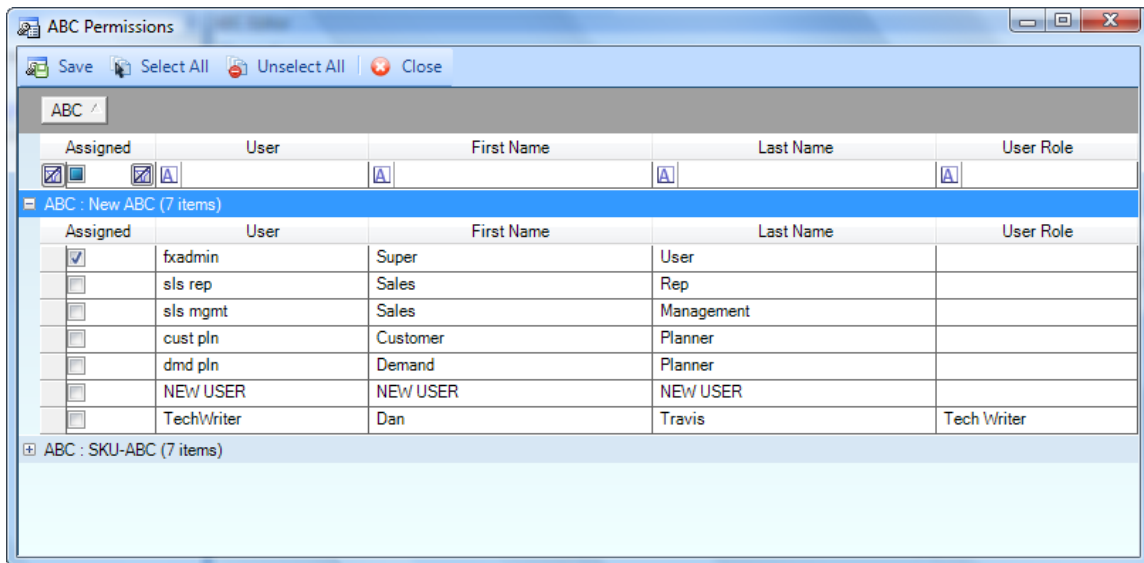
Note When an ABC analysis is run, the current Data Permissions and applied filters are taken into consideration.

Share an ABC Template

After an ABC template is created, you can share it with other users, allowing them apply a similar ranking to their data.

- 1 From the **ABC Editor** window, select the template you want to share and click the **Permissions** button.

The **ABC Permissions** window displays.



- 2 Use the check boxes in the **Assigned** column to select users with whom you want to share the *template*.
Use the **Select All** and the **Unselect All** to check or uncheck all the checkboxes.
- 3 Click **Save**. The selected users can now view the template and apply it to their data.
- 4 Click **Close** to exit the ABC Permissions window.

Using Conversion Factors

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Conversion Management 126

Conversion Groups 128

Overview

The DME provides a function that converts the data into different units of measurement (for example, eaches to cases or units to dollars). In addition, it is possible to create factors that change the total unit sales to average daily sales. This is important because the number of sales days in a month dramatically affects the sales volume. By “normalizing” the raw data to account for the number of sales days, DME can improve the accuracy of the Forecast. The converted data is not saved in the database.

Conversion factors have a very powerful capability in the sense that they are bi-directional. For example, if you are selling 100 units at \$10 to achieve \$1,000 in revenue and you anticipate revenue to increase to \$1,200, you could adjust either units or price to achieve this result. With conversion factors, it is possible to adjust the revenue and have it affect either the units or the price. The results are determined by the way in which the conversion factor is applied. The following table depicts the ways that conversion factors can be used.

Revenue Increase Achieved Through Unit Volume Increase					
Base Number	Conversion Factor	Result	Change	Return To Base	Result
Units	Price	Units * Price	Revenue	(Revenue / Price)	Price
100	\$10	\$1,000	\$1,200	120	\$10

Revenue Increase Achieved Through Pricing Increase					
Base Number	Conversion Factor	Result	Change	Return To Base	Result
Price	Units	Price * Units	Revenue	(Revenue / Units)	Units
\$10	100	\$1,000	\$1,200	\$12	100

In all cases, the number on the left side of the equation serves as the base that is converted by the factor. It is possible to achieve the desired revenue growth through both pricing and unit volume changes.

Conversion Management

Conversions are created and edited using the DME Admin Tool. Once created, they can be used to create Conversion Groups which are applied to Scenarios in the DME Viewer.

Create a Conversion

- 1 Click the **Conversions** button in the **General** section of the **Managers** tab.

The **Conversion Editor** displays.

Conversion	Owner
ForecastCost	fxadmin
Forecast Revenue	fxadmin
Inventory Cost	fxadmin
Inventory Revenue	fxadmin

Main Settings	
Name	Forecast Cost
Factor type	Opinion Lines
Factor	ConvFactor02
Label	Cost
Color	Red
Symbol	\$
Symbol Position	Leading

- 2 Click the **New** button. The fields in the Conversion Editor section are cleared.

The following fields are used to create a conversion:

Table 7.1 New Conversion

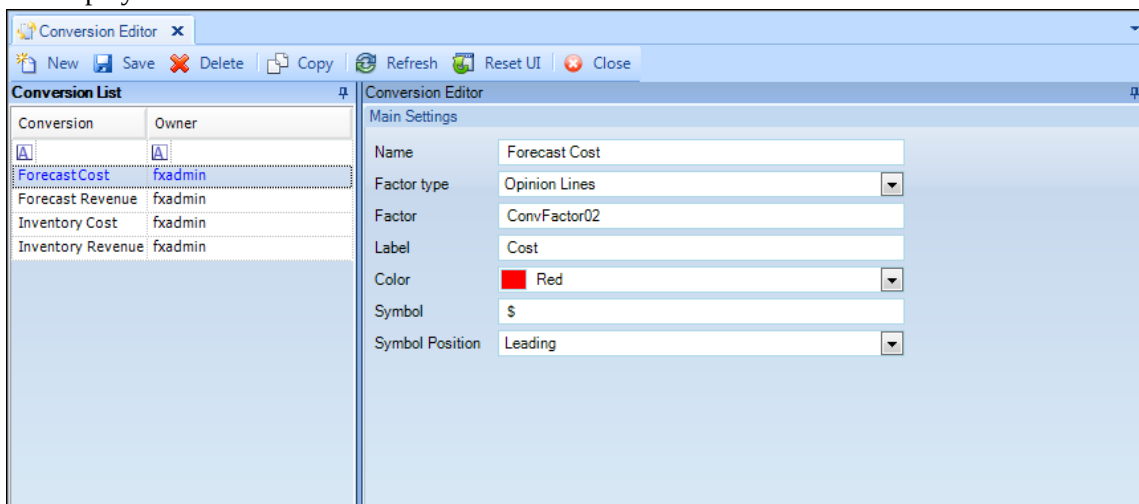
Field	Description
Name	The name for this conversion. Should provide a description of the conversion for easy reference.
Factor Type	Indicates whether this conversion will be applied to an Opinion Line or a Series Attribute.
Factor	Indicates the individual field to which the conversion will be applied. Values in this drop-down list vary based on the selected Factor Type.
Label	A custom name for the selected Factor that displays in the Viewer when this conversion group is applied.
Color	Indicates the color that will display in the column header while the data is converted.
Symbol	Indicates the symbol that will display in the data while it is converted.
Symbol Position	Indicates if the Symbol will display Leading or Trailing the value in the converted opinion line displayed.

- 3 Click **Save** when finished.

Edit a Conversion

- 1 Click the **Conversions** button in the **General** section of the **Managers** tab.

The **Conversion Editor** tab displays. Select the conversion you want to update and the details display in the Conversion Editor section.



The **Conversion Editor** allows you to make updates to any field.

- 2 Click **Save** when finished to save your changes.
- 3 Click the **Close** button to exit the Conversion Editor.

Conversion Groups

Conversion Groups are comprised of one or more conversion factors that can be applied to a Scenario in the Viewer.

Create a Conversion Group

- 1 Click the **Conversion Groups** button in the **General** section of the **Managers** tab.
The **Conversion Group Editor** displays.

The screenshot shows the 'Conversion Group Editor' window. On the left, the 'Conversion Group List' table shows a group named 'Forecast Numbers' owned by 'fxadmin'. The main area is divided into 'Main Settings' and 'Calculations'. 'Main Settings' has a 'Name' field set to 'Forecast Numbers'. 'Calculations' has an 'Add' button and a table with the following data:

Conversion	Opinion Line	Valid
Forecast Revenue	UserValue04	→→
Forecast Cost	UserValue04	→→
Forecast Revenue	ActShipments	→→
Forecast Revenue	UserValue01	→→
Forecast Revenue	UserValue02	→→
Forecast Revenue	UserValue03	→→
Forecast Revenue	FValue	→→

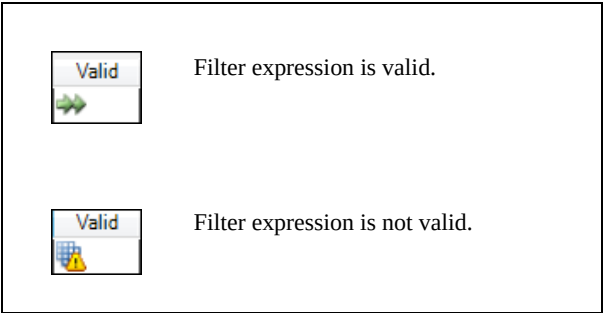
- 2 Click the **New** button. The fields in the Conversion Group Editor are cleared.
- 3 Enter a **Name** for the Conversion Group being created. This name will display in the Conversions drop-down list in the Viewer.
- 4 In the **Calculations** section, click the **Add** button to insert a new row.

The screenshot shows the 'Conversion Group Editor' window after clicking the 'New' button. The 'Conversion Group List' table now shows a new group named 'Conversion Group' owned by 'fxadmin'. The 'Main Settings' section has a 'Name' field set to 'Conversion Group'. The 'Calculations' section has an 'Add' button and a table with the following data:

Conversion	Opinion Line	Valid
Forecast Cost		→→

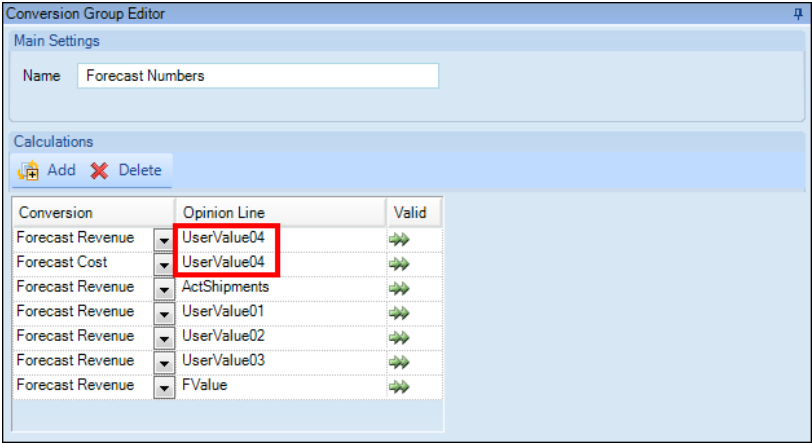
- 5 Use the drop-down lists to select the **Conversion** and the **Opinion Line** to which it will be applied.

The icon in the **Valid** column will indicate whether or not this calculation is valid.



- 6 Repeat these steps for each Conversion you want to add to the Conversion Group.
- 7 Click **Save** when finished.

Note Opinion lines can be used in multiple Conversion Groups since the results are displayed in separate temporary columns. For example, you could display the forecast converted into both cost and price, or pallets and cases.



Edit a Conversion Group

- 1 Click the **Conversion Groups** button in the **General** section of the **Managers** tab.
The **Conversion Group List** tab displays. Select the conversion you want to update and the details display in the Conversion Group Editor.

The screenshot shows the 'Conversion Group Editor' window. On the left is the 'Conversion Group List' pane with a table:

Conversion Group	Owner
[A]	[A]
Forecast Numbers	fxadmin
Inventory Numbers	fxadmin

The main area is titled 'Conversion Group Editor' and contains a 'Main Settings' section with a 'Name' field set to 'Conversion Group'. Below this is a 'Calculations' section with 'Add' and 'Delete' buttons. A table shows the current configuration:

Conversion	Opinion Line	Valid
Forecast Cost		

- 2 The **Conversion Group Editor** section allows you to make updates to any field.

This screenshot shows the 'Conversion Group Editor' window with the 'Main Settings' section. The 'Name' field is set to 'FValue Conversion'. The 'Calculations' section has 'Add' and 'Delete' buttons. The configuration table is as follows:

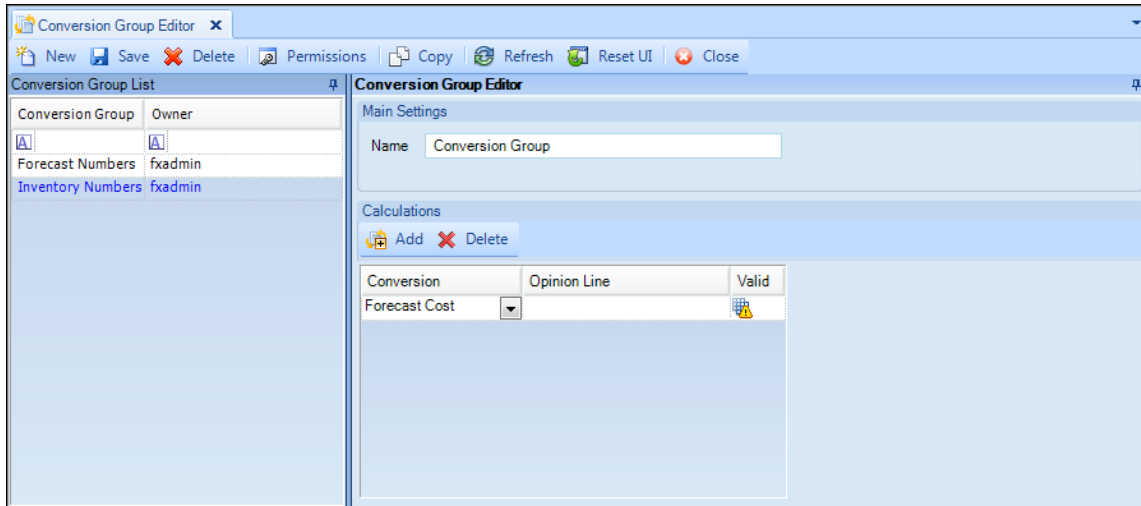
Conversion	Opinion Line	Valid
Conversion Attribute	FValue	→

- 3 Click **Save** when finished to save your changes.
- 4 Click the **Close** button to exit the Conversion Group Editor.

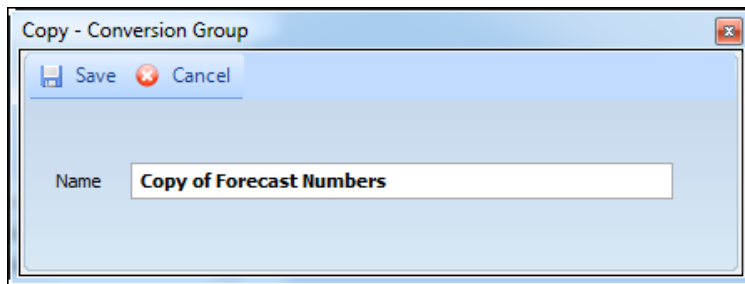
Create a Copy of a Conversion Group

Making a copy of a conversion group allows users to create a new group based on an existing one without having to recreate it.

- 1 Click the **Conversion Groups** button in the **General** section of the **Managers** tab.
The **Conversion Group List** tab displays. Select the conversion you want to make a copy of and the details display in the Conversion Group Editor.



- 2 Click the **Copy** button.
- 3 In the **Copy - Conversion Group** window, enter the name of the new conversion group you are creating.



- 4 Click **Save**. The new conversion group is created and added to the Conversion Group List.
- 5 Select the new conversion group to view the settings in the Conversion Group Editor window.
- 6 Make any necessary changes and click **Save**.

Grant Access to a Conversion Group

You can share a Conversion Group with other users allowing them to use the group, but they will not be able to modify the group.

- 1 Click the **Conversion Groups** button in the **General** section of the **Managers** tab.
- 2 The **Conversion Group List** tab displays. Select the conversion you want to assign permission to and the details display in the Conversion Group Editor.
- 3 Click the **Permissions** button and the **Conversion Permissions** window opens.

Assigned	User	First Name	Last Name	User Role
☐	bob	Bob	Bob	
☒	fxadmin	Super	User	
☐	new	new	new	
☐	rick	Rick	Rick	
☐	sales	Sales	Sales	

☐ Description : Forecast Numbers (5 items)
☐ Description : Inventory Numbers (5 items)

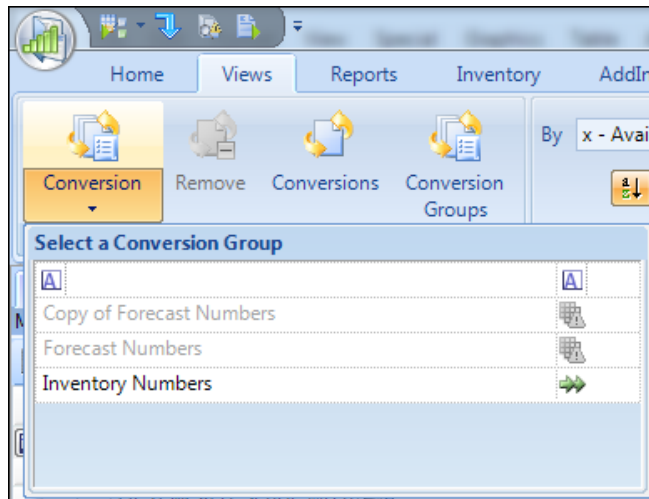
- 4 Use the **Assigned** checkboxes to indicate the users you want to have access to this conversion group.
- 5 Click **Save**.

Apply a Conversion Group

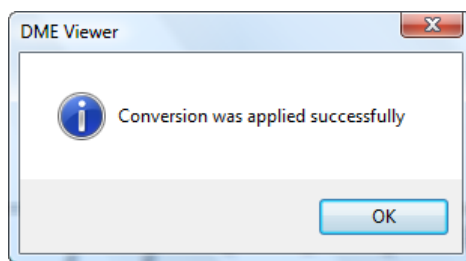
Once a Conversion Group is defined and the data is loaded, it is possible to assign and apply the conversion to Scenarios in the Viewer.

- 1 In the DME Viewer, open a **Scenario**.
- 2 On the **Views** tab, click the **Conversion** button to display the drop-down list

- 3 Select the **Conversion Group** you want to apply:



- 4 DME will ask you to confirm that you want to apply the conversion. Click “Yes” to apply or click “No” to cancel.
- 5 The “Conversion was applied successfully” message displays.



To remove the Conversion Group, click the **Remove** button on the Views ribbon.

Notes

- Users cannot commit DTL scenarios with applied conversion factors. The data must be stored in a consistent unit of measure in the Living Master scenario.
- Conversions can be applied in the Data and user created views, as well as in the Summary View.
- Conversion can be applied while in a hierarchy. Ensure values like price/cost are defined in the Hierarchy manager set up to use a weighted average calculation, otherwise data will not have a value at a hierarchy level.

Grouping

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Static Hierarchy Management **136**

On Fly Hierarchies **151**

Overview

Grouping is sometimes referred to as “Multi-level Forecasting” because it provides a powerful mechanism for Forecasting and planning. The process provides the ability to group information that is by itself erratic, but when combined contains patterns that are often more statistically forecastable. This is often seen in seasonal products or with Distributors with intermittent demand where individual series level patterns appear erratic, but when all of the items at a customer site are taken together, a forecastable pattern can be seen.

Hierarchy Management is a powerful component of the DME that is used for allocating forecast changes among different, aggregation levels. For example, Demand Planners may view and edit data at a Product Family level, while Sales Representative may add input at a Customer level. Hierarchy Management allows for the definition and creation of groupings at different levels for different functionality provided input to the Forecasting process.

In the DME there are two ways to perform grouping.

Table 8.1

Grouping	Description
Bottom-Up Aggregation	Aggregates (sums up) the detailed series to higher levels within a business hierarchy.
Top-Down Grouping	Display of data at a higher level to allow the pattern to emerge and then provides the ability to push the modifications back down on a percentage basis to properly forecast or adjust the lowest level of detail. When higher level information is pushed down into the detail, the forecast is said to be developed top down.

The Hierarchy Manager enables you to look at your data at a higher level, to make changes to the data and allocate the changes down to the detail data. The Hierarchy Manager is available in the Viewer and allows users to dynamically create aggregates and roll up, or down.

Static Hierarchy Management

Overview

Static hierarchies create physical data for each defined grouping level that is stored in the database, until the hierarchy is removed. **On Fly** hierarchies display grouping level totals for use only while the scenario is open. Some DME Viewer functionality require this physical data.

Users can only apply **Static** Hierarchies to scenarios they own. For example, *fxadmin* owns the Living Master, users own their DTL scenarios. Users can not apply a **Static** hierarchy to the Living Master.

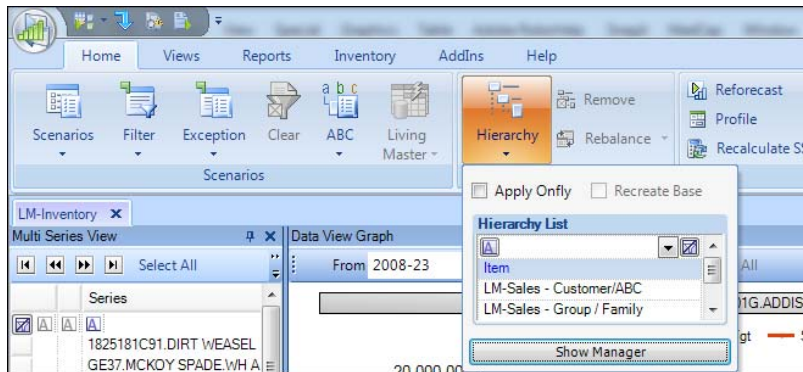
Steps in Defining a Hierarchy Structure

- 6 Define the levels (example: Region – Customer - SKU).
- 7 Determine which Opinion Line and settings that will define the percentage used to push top-level changes down to the detail level.

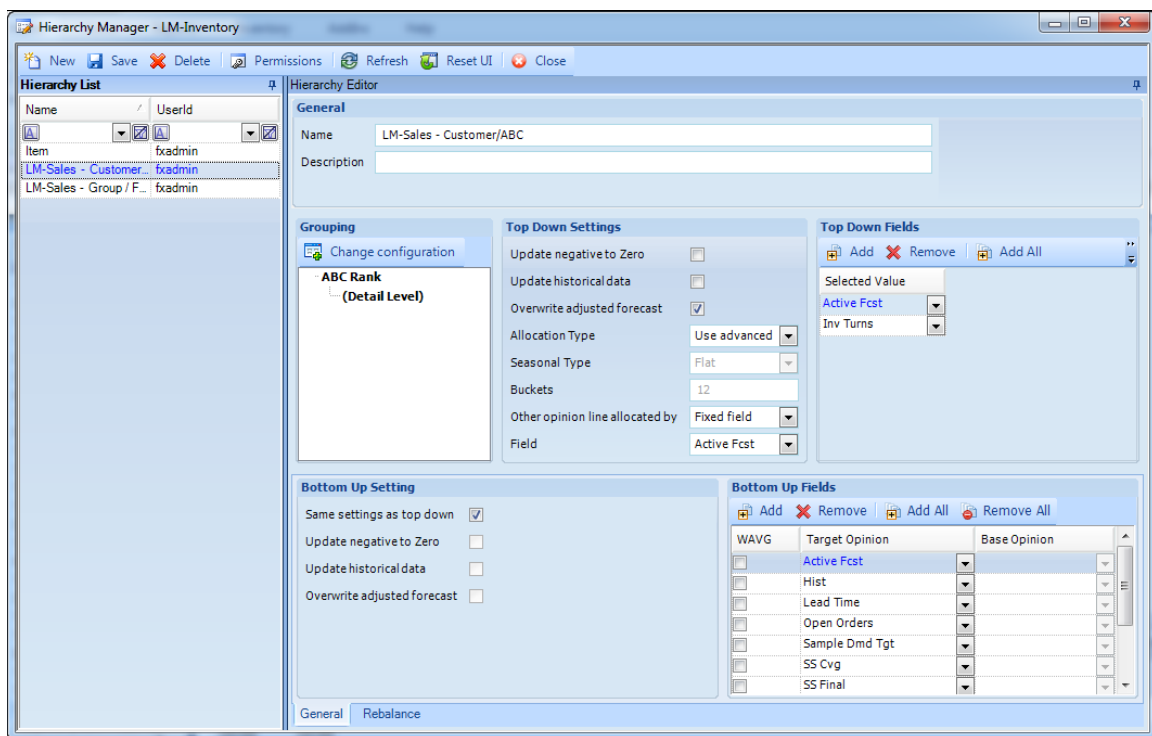
- 8 Determine the Opinion Lines that will have adjustment values pushed down and the Opinions Lines that will have values summed (rolled) up. For example: budget or goal, actual history.

Create a Static Hierarchy

- 1 On the **Home** menu, click the **Hierarchy** icon to open the drop-down.



- 2 Click the **Show Manager** button at the bottom of the drop-down.
The **Hierarchy Manager** window displays.



The following table details how each button is used.

Table 8.2

Button	Description
New	Create a new hierarchy.

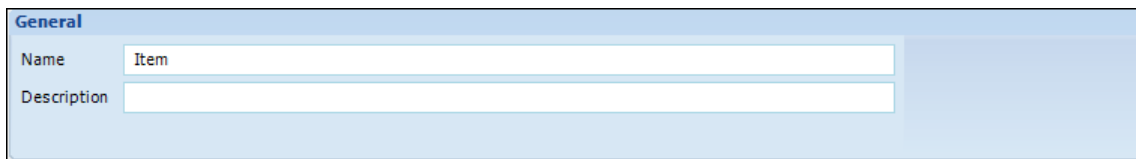
Table 8.2

Button	Description
Save	Saves any changes to the current hierarchy.
Delete	Removes a hierarchy from the available list.
Refresh	Refresh the manager to show new hierarchies.
Reset UI	Returns the interface to its original settings.
Close	Closes the Hierarchy Manager window.

- Click the **New** button. The fields in the **Hierarchy Editor** are cleared and reset.

General

- Enter a *name for the hierarchy* in the **Name** text box

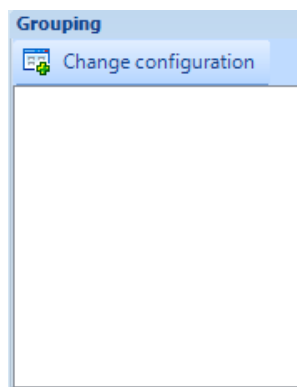


The screenshot shows a window titled 'General' with two text input fields. The first field is labeled 'Name' and contains the text 'Item'. The second field is labeled 'Description' and is currently empty.

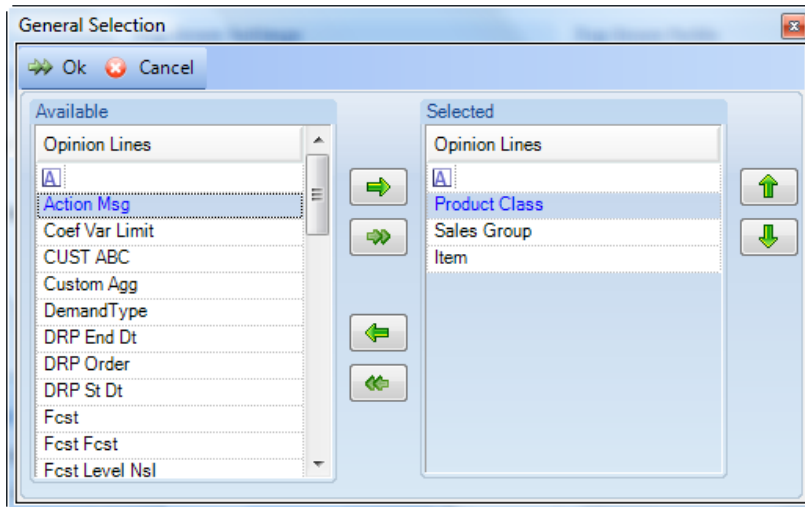
- Enter a brief **Description** of the hierarchy in the text field.
- Click the **Save** button.

Grouping

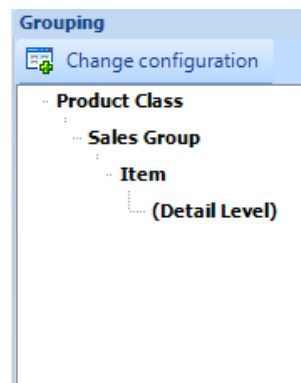
- To define the grouping levels for the hierarchy, in the **Grouping Section**, click the **Change Configuration** button.



The **General Selection** window displays.



- 2 Select the series properties you want to display from the **Available** column and use the arrow buttons in the middle to move them to the **Selected** column.
The double arrow buttons allow you to select or remove all lines.
- 3 Use the **Up** and **Down** arrow buttons at the far right to change the order in which the grouping levels are created.
- 4 Click **Ok**.
The Grouping section displays your hierarchy selections.



In this example the data will group at the Product Class at the highest level, under each Product Class will be the Sales Groups, then the item groups with the lowest level at the Detail level.

Top Down Settings

- 1 In the **Top Down Settings** section, you can configure the following settings to define the percentage used to push down adjustment or forecast allocation:

Update Negative to Zero, Update Historical Data, and Overwrite Adjusted Forecast are advanced features and have the following effects on the forecast.

Table 8.3

Checkbox	Description
Update Negative to Zero	Any negative values in the Top Down Fields are set to zero.
Update Historical Data	If this box is not checked, only future values are updated. Checking this box will allow value changes to allocate to historical periods as well
Overwrite Adjusted Forecast	If checked, any manual adjustments made to the forecast are affected. If unchecked, the manual adjustments remain.
This is effective for the FValue opinion line only.	

- 2 Select the **Allocation Type** to be used from the following options:

Table 8.4

Option	Description
Forecast	This option uses future data to allocate values throughout the hierarchy. This is effective for allocation to the FValue opinion line only.
If this option is selected you can also choose between the two Seasonal options available.	

Table 8.4

Option	Description
Historical	This option uses historical data to allocate values throughout the hierarchy. This is effective for allocation to the FValue opinion line only. If this option is selected, you can choose between two seasonal options to allocate values: • Flat: This option uses a specific number of Periods of data for the allocation. • Seasonal: This option uses a specific number of Buckets of data for the allocation.
Use Advanced Settings	Use this to allow other opinion lines to be used for the allocation percentage to be created. When this option is selected, the Allocation Basic Settings field will be disabled.

3 Use the **Other Opinion Line Allocated By** field to select one of the following:

Table 8.5

Other Opinion Line	Effect	Example
Fixed Field	Allows for the selection of a specific opinion to create the allocation percentage.	For example, the Baseline Forecast could be used to allocate adjustments to the Override or Sales Adjustments make at a family level to the lower level series.
Itself	Will create the allocation percentage from the lower level values in the top down field that has been adjusted,	For example if Override is in the top down list. The values in the lower level series for the Override opinion line will be used to create the percentage to allocate an adjustment made at the Product Class level.

Top Down Fields

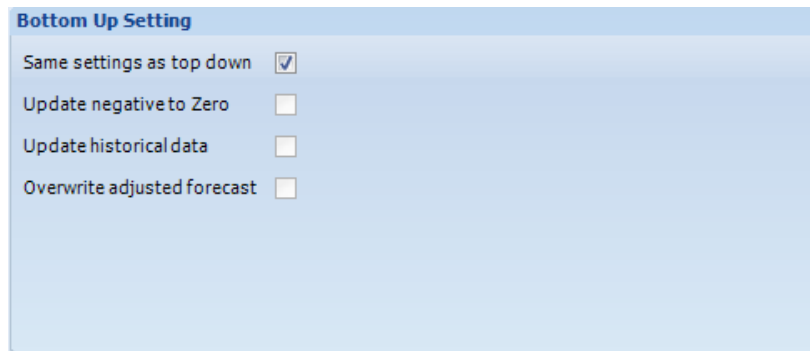
4 In the **Top Down Fields** section, click the **Add** button make changes to the list. A new field will be added to the list.



- 5 Use the drop-down list to select the fields to be added. Only fields that will be edited or adjusted should be in a Top Down configuration.
- 6 To delete a field from the list, select it and click **Remove**.
You can use the **Add All** and **Remove All** buttons to add all available fields or remove all selected fields.

Bottom Up Setting

- 1 In the **Bottom Up Setting** section, you can identify which fields will sum up in the grouping levels of the hierarchy.



- 2 Check **Same Settings as Top Down** box.

When this setting is selected, DME uses the settings you chose in the **Top Down Settings** section for “Update Negative to Zero”, “Update Historical Data”, and “Overwrite Adjusted Forecast”. In addition, series marked as “Do not Forecast” or “Forecast Completed” are not updated.

Uncheck the **Same Settings as Top Down** text box to select different settings than in the Top Down Settings.

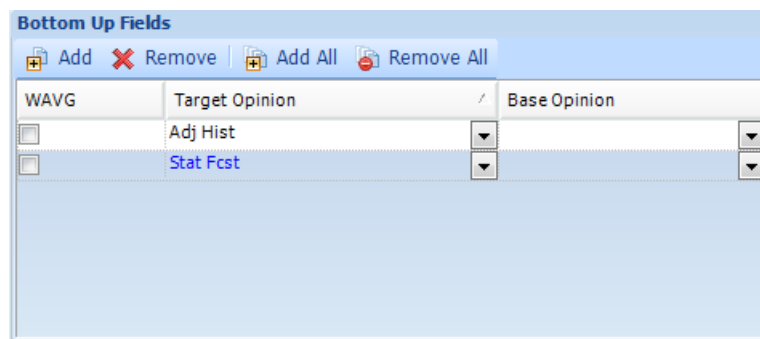
- 3 Use the **Update Negative to Zero**, **Update Historical Data**, and **Overwrite Adjusted Forecast** settings to have the following effects on the forecast:

Table 8.6

Checkbox	Description
Update Negative to Zero	Any negative values in the Bottom Up Fields are set to zero.
Update Historical Data	If unchecked, only future values are updated.
Overwrite Adjusted Forecast	If checked, any manual adjustments made to the forecast (FValue opinion line only) are affected. If unchecked, the manual adjustments remain.

Bottom Up Fields

- 1 In the **Bottom Up Fields** section, click the **Add** button make changes to the list. A new field will be added to the list.



- 2 Use the drop-down list to select the fields to be added.
- 3 To delete a field from the list, select it and click the **Remove** button. You can use the **Add All** and **Remove All** buttons to add all available fields or remove all selected fields.
- Note** Opinion lines not on to this list will not sum up in the grouping levels. Zero values will be displayed, even if data exists at a lower level.
- 4 WAVG is used when values should not be summed, however displayed as a weighted average at a higher level, such as price or cost. Check the **WAVG** box and choose the desired opinion line from the Base Opinion to use when creating the weighting.

Rebalance Tab

At the bottom the Hierarchy Manager screen, you will notice two tabs: **General** and **Rebalance**. The Rebalance tab allows for settings to automate the allocation of adjustments immediately upon entry or on demand by the user.

- 1 Click the **Rebalance** tab.

The screenshot shows the 'Hierarchy Manager - LM-Inventory' application window. On the left is a 'Hierarchy List' pane showing a tree structure with 'LM-Sales - Customer...' and 'LM-Sales - Group / F...' under the user 'fxadmin'. The main area is the 'Hierarchy Editor' with several tabs: 'General', 'Top Down Settings', 'Top Down Fields', and 'Rebalance'. The 'Rebalance' tab is selected and highlighted with a red box. It contains the following settings:

- Activate On-fly Rebalance:** ☒
- On-Demand Rebalance Settings Base Level:** A dropdown menu showing 'ABC Rank'.
- Allow Change Base Level When Static Rebalance:** ☒

At the bottom of the window, there are two tabs: 'General' and 'Rebalance', with 'Rebalance' being the active tab.

- 2 The DME supports two rebalancing methods:

- **Activate On-Fly** – rebalancing is done immediately following any adjustments. **Activate On-Fly** should be checked for any hierarchies used in the Planning Portal.
- **On-Demand** – users can Rebalance by clicking the **Rebalance** button in the **Hierarchy Section** of the **Home** menu. The level indicated in the box will be used as the level for Rebalance by default, however the user can still change the level to initiate the rebalance when selecting from the menu.

This is a close-up of the 'Rebalance' tab settings from the previous screenshot. It shows:

- Activate On-fly Rebalance:** ☐ (unchecked)
- On-Demand Rebalance Settings Base Level:** A dropdown menu showing '(Detail Level)'.
- Allow Change Base Level When Static Rebalance:** ☒ (checked)

- 3 Select the **Allow Change Base Level When Static Rebalance** check box to rebalance with the lowest level of detail.
- 4 Click the **Save** button.

Defining the Level of the Hierarchy to Rebalance:

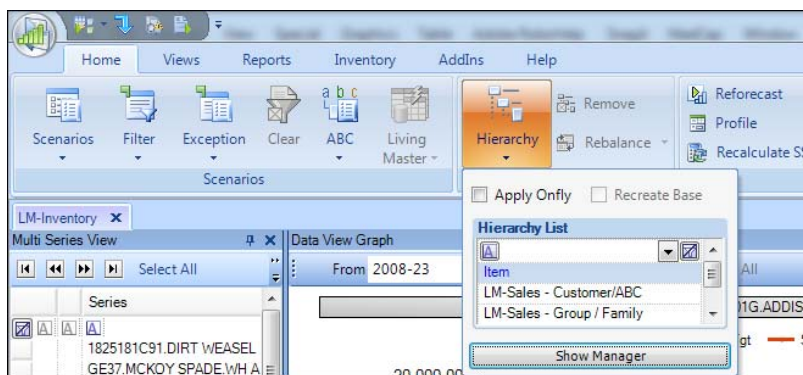
- When making an adjustment at an aggregate level of the Hierarchy, the type of rebalancing or allocation will depend upon the number of Levels within that aggregation or Grouping (tree level) of the Hierarchy.
- When the user chooses to rebalance on demand, they should select the level in which the adjustments are made.

Note Users should not make adjustments at two different levels and then rebalance since one level's changes may erase those made in the other. Users should make all changes in a level and then rebalance before moving to another level.

Edit a Hierarchy

You can edit a hierarchy at any time.

- 1 On the **Home** menu, click the **Hierarchy** icon to open the drop-down.

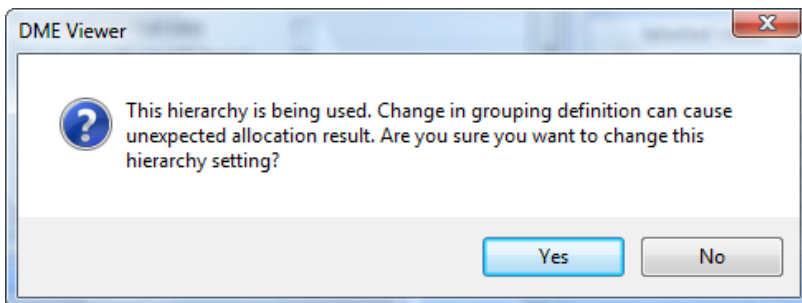


- 2 Click the **Show Manager** button at the bottom of the drop-down.

The **Hierarchy Manager** window displays.

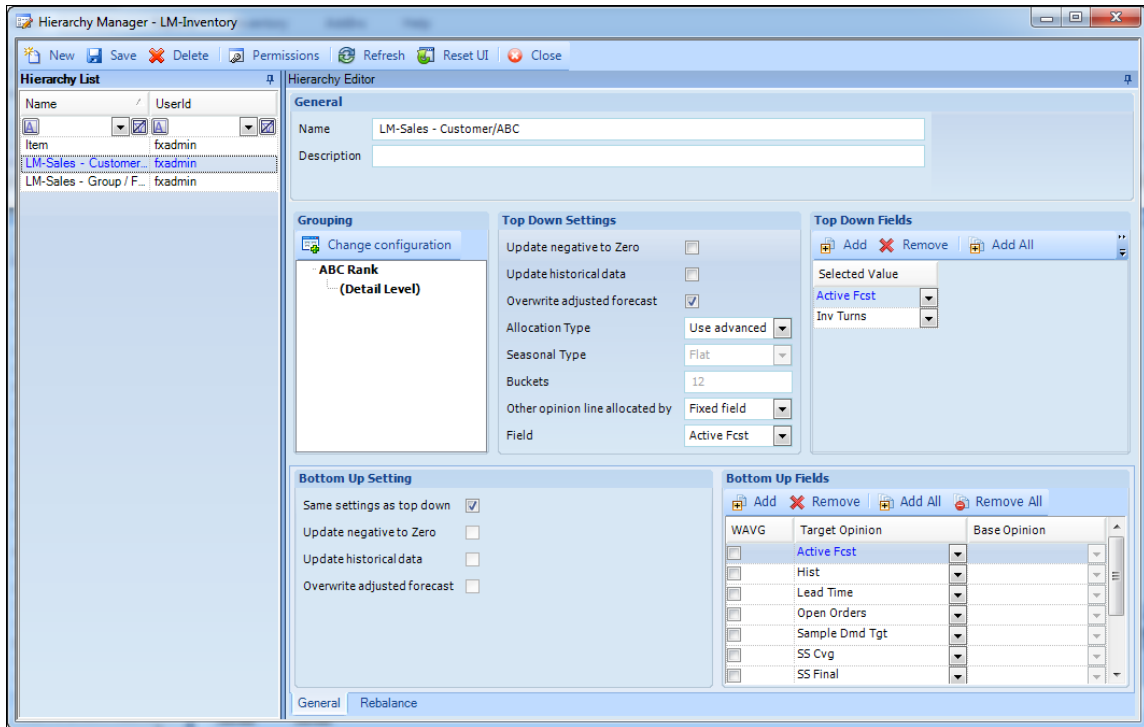
- 3 Select the Hierarchy to update in the Hierarchy List pane and the details for the selected hierarchy display in the Hierarchy Editor.
- 4 Make any necessary changes to the hierarchy and click **Save**.

If the hierarchy has been applied to a Scenario, and you change the Grouping, a confirmation window displays.

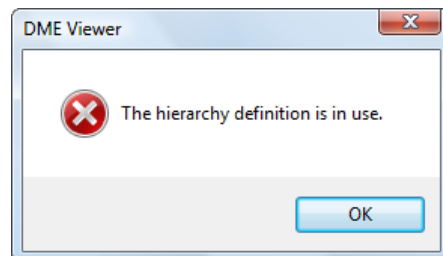


Delete a Hierarchy

- 1 Select the *hierarchy* you want to delete and click **Delete**.



If the hierarchy was applied to a Scenario, the following message displays.



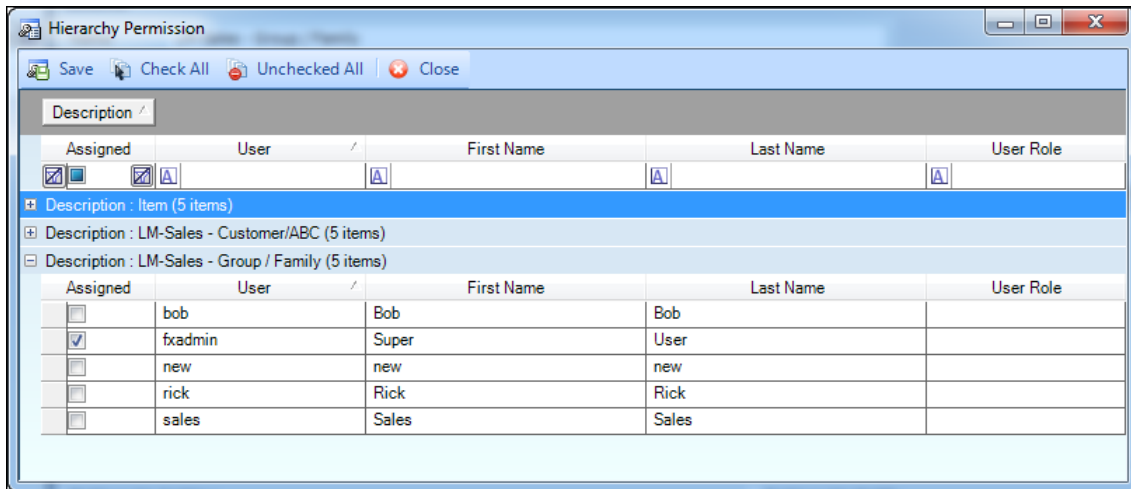
- 2 Click **OK**. The hierarchy is not deleted from the hierarchy list.

Note To delete a hierarchy in use, you must remove it first. See Section [Remove a Hierarchy](#) for information on how to remove a hierarchy.

Share a Hierarchy

You can share a Hierarchy with other users by granting access based on their User ID. Once it is shared, other users can apply the hierarchy to their Scenarios, but will not be able to modify it.

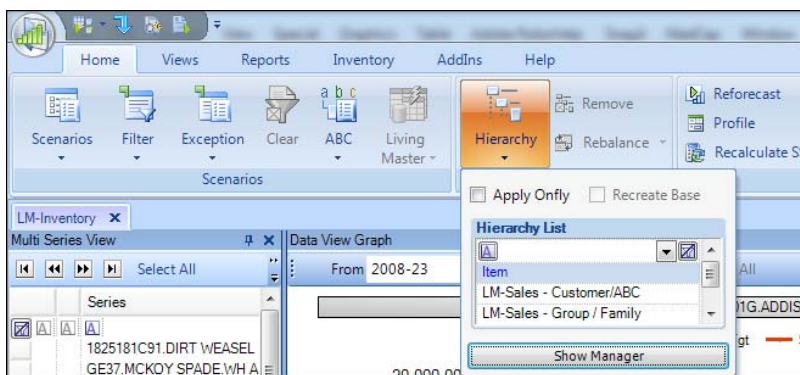
- 1 On the **Hierarchy Manager**, select the *hierarchy* you want to share and click the **Permissions** button.
- 2 The **Hierarchy Permissions** window opens.



- 3 Use the **Assigned** checkboxes to indicate the users you want to have access to this hierarchy.
- 4 Click **Save**.

Apply a Hierarchy to a Scenario

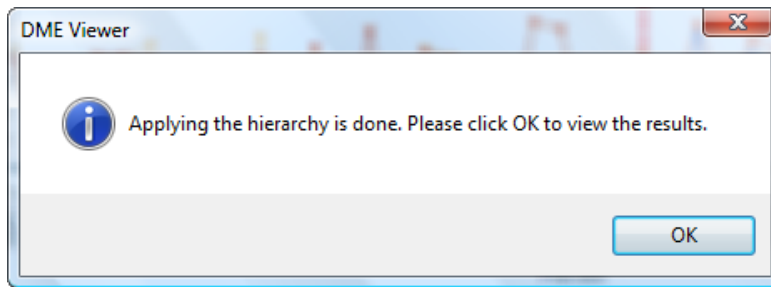
- 1 On the **Home** menu, click the **Hierarchy** icon to open the drop-down.



- 2 Uncheck the **Apply Onfly** box to apply a Static hierarchy. Only the owner of the scenario can apply a static hierarchy. Fxadmin owns the Living Master, users own their DTL scenario.
Many Static hierarchies are defined as part of the forecasting process and are applied to the scenario in the nightly batch jobs. This option allows the hierarchy to be available to users at all times.

- 3 Select the *hierarchy* you want to apply.

After the Viewer applies the hierarchy to the Scenario, the following message displays:



- 4 Click **OK**.

The group level is displayed in the Viewer.

For a Static hierarchy physical data is created in the database that includes a scenario for each grouping level. The new Scenario names are the name of the Scenario appended by “–”, then appended by the level number.

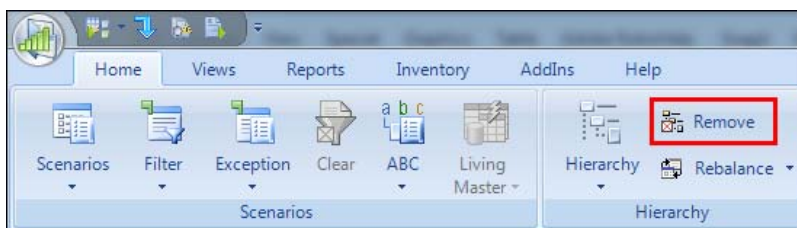
For example, the name of the detail Scenario is “ABC”. The applied hierarchy has three levels, detail level, level 1, and level 2 (its grouping has two fields).

After applying the hierarchy, the Scenario names are the following:

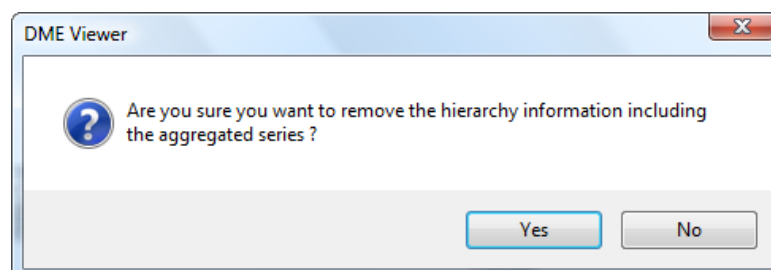
- Scenario ABC is the detail level
- Level 1 Scenario is ABC – 1.
- Level 2 Scenario is ABC – 2.

Remove a Hierarchy

- 1 Click the **Remove** button in the **Hierarchy** section of the **Home** tab in the ribbon.

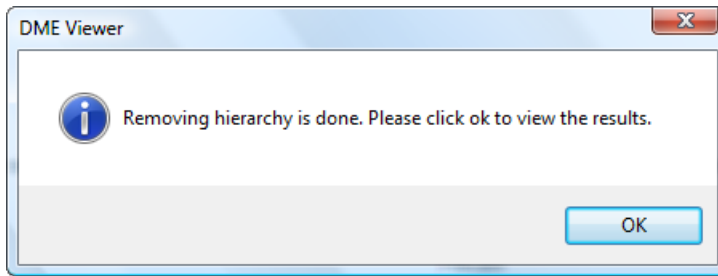


The following message displays.



2 Click **Yes**.

The following message displays when the operation is done



3 Click **OK**.

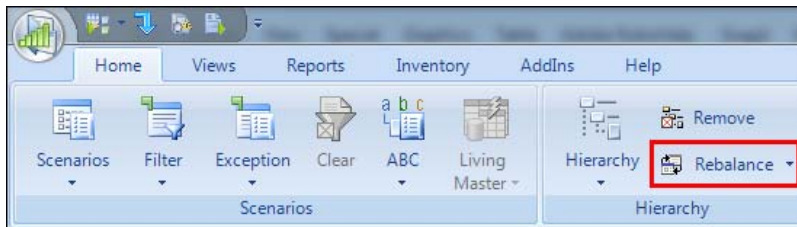
The hierarchy and grouping levels are removed. After removing the static hierarchy, the created data levels are removed from the database.

Make Adjustments to the Forecast

Following any adjustments, if the hierarchy applied to the Scenario has “Activate On-Fly Rebalance” checked, the new values of the series are grouped to series at other levels when the series is saved (explicitly or by moving to other series), and the base level is the level the series belongs to. Otherwise, the new values will not be grouped until you rebalance the tree explicitly.

Rebalance a Hierarchy

- 1 Open a Scenario that has a hierarchy applied.
- 2 Click the **Rebalance** button in the **Hierarchy** menu in the ribbon.

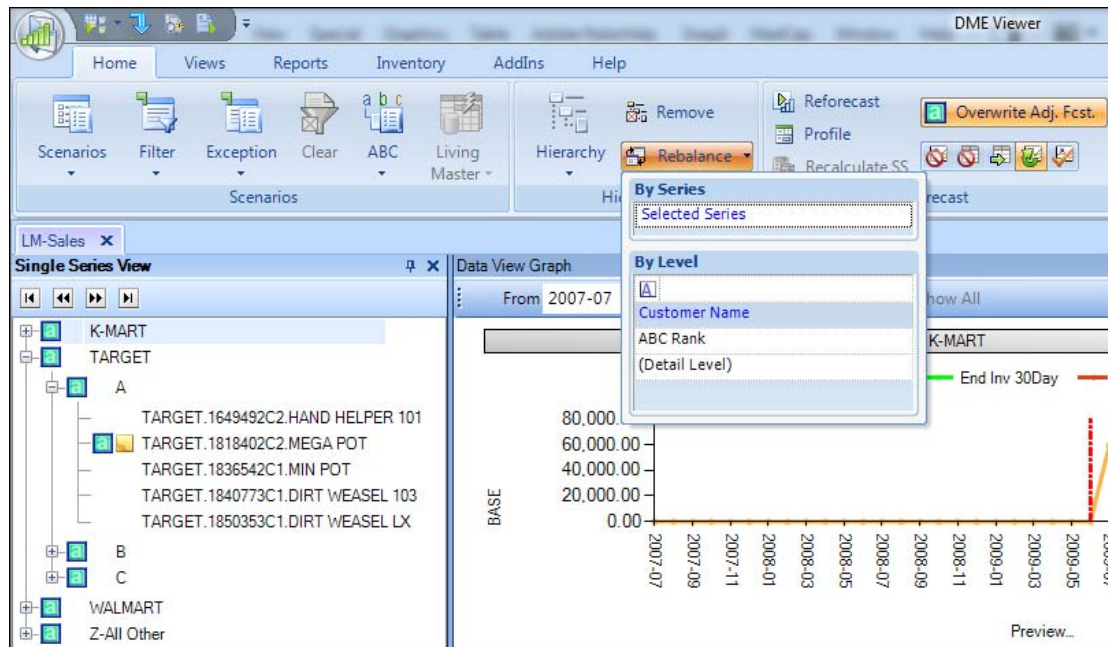


The level to be rebalanced (where the adjustment is made) can be selected from the menu. If you still have the level highlighted where the adjustment has been made, choose “Selected Series”

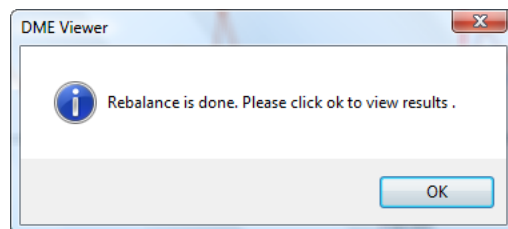
In the example below:

- Customer Name is level 2 (K-MART, TARGET, etc.)
- ABC Rank is level 1 (A, B, C)

- Detail is level 0 (not available for selection in rebalance).



- 3 When the hierarchy is removed, the following window displays if a rebalance is necessary during the removal due to an identified change in values:



- 4 Click **OK**.

On Fly Hierarchies

On Fly hierarchies are different from Static hierarchies and offer the user some key advantages:

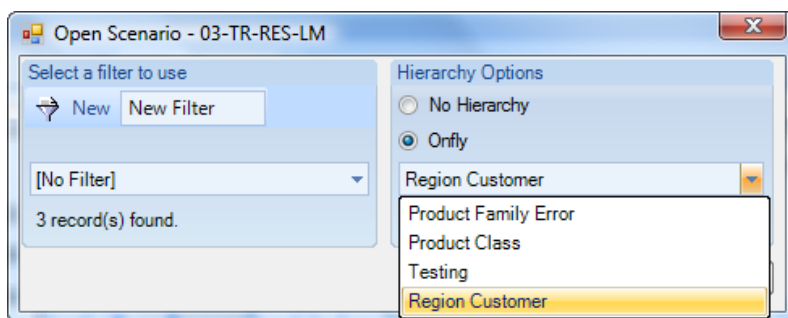
- Improved performance when applying the hierarchy to a scenario. Opening a scenario with an On-Fly hierarchy is much faster than applying a Static hierarchy.
- On Fly hierarchies do not create physical data retained in the database and are removed when the scenario is closed.
- Available for use to users with the Living Master.

Using On Fly Hierarchies

Applying On-Fly uses the same hierarchies as applying as Static.

After creating the hierarchy structure, you can make this new hierarchy available to other users by giving the user permission to use it. Please refer to [“Share a Hierarchy” on page 148](#) to learn how to share hierarchies with other users.

The On-Fly hierarchy can be chosen when logging in to a scenario or while in a scenario.



To open a hierarchy during log in, select the **On-Fly** radio button and select the desired hierarchy from the drop-down list.

Series that have been calculated will refresh the data when the user selects the series level and series that have been calculated will display with the **Description** field in a bold font.

Using On-Fly Hierarchies Without On-Fly Rebalance

When a hierarchy definition does not use the “On-Fly rebalance” option, the user must rebalance the changes they make on the hierarchy. Since aggregated series are not saved to the database, changes in the aggregated levels are lost if you don’t save them and manually rebalance your hierarchy.

Another option is to make your changes to the desired level of the hierarchy and press the refresh key (F5). If there are unsaved changes, you will be prompted to save. You can then rebalance your hierarchy to apply those changes. This message will also be displayed when you try to close a scenario with changes to the aggregate level series.

Limitations with On-Fly Hierarchies

On-Fly hierarchies are available only if your DME database was installed in a SQL 2005 DB engine. If your database is created in a prior version, this option will be disabled.

While using On-Fly hierarchies in the Viewer, there are certain limitations on aggregated series. Any operation can be performed on the detail level series, but since aggregated series are not saved to the database, the following operations cannot be performed:

- Run DRP
- Run Retagging
- Apply events
- Run Exceptions (Exceptions can be run, but is calculated on the lowest level)
- Apply a lifecycle profile
- Run an ABC analysis (ABC analysis can be run, but is calculated on the lowest level)
- The “Allow Change Base Level When Static Rebalance” option is ignored in On-Fly hierarchies. You will be prompted to select the level at which to rebalance.
- Since aggregated series are not saved to the database, they cannot be cloned, renamed, copied, or moved.

- New series are not created while a hierarchy is applied.

Life Cycle Forecasting

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Overview

The DME Life Cycle Forecast feature enables users to predefine the life cycle pattern. With this feature, once a profile has been defined, a forecast can be created based on that profile. A user can define as many “Profiles” as needed.

In order to use lifecycle you must first create at least one profile and then specify the LifeCycle forecast method for one or more series.

When creating or editing profiles there are four panes available and each contains different information:

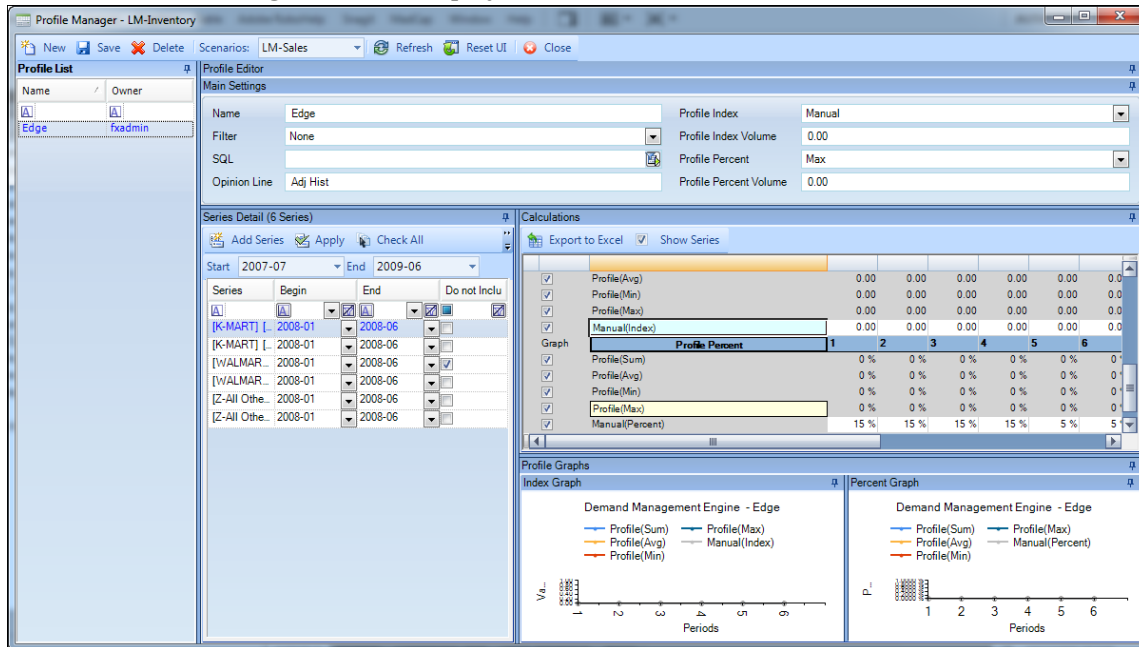
- **Main Settings** - This section is used to specify a name, filter, and the data to use in the profile calculation (Opinion Line). Also allows you to decide which of the available calculations to choose as the final Profile Index and Percent calculation.
- **Series Detail** - This section displays the series that will be included in your calculations as well as the date range used for the calculations. Series can be added using a filter in the Main Settings section or added manually from this section.
- **Calculations** - This section includes a grid that shows the different calculations being performed on the selected data. In order to show calculations for the first time or to refresh changes, you must have at least one series in the Series Detail pane and click the **Apply** button. You also have the ability to export the grid to Microsoft Excel, and hide each individual series from the grid but still have them included in the calculations.
- **Profile Graphs** - This section includes a graph of all the available Index calculations and a graph with each of the available Percent calculations. These graphs help you visualize which of the available calculations (Max, Min, Avg, or Manual) is right for the profile you are creating.

Create a Profile

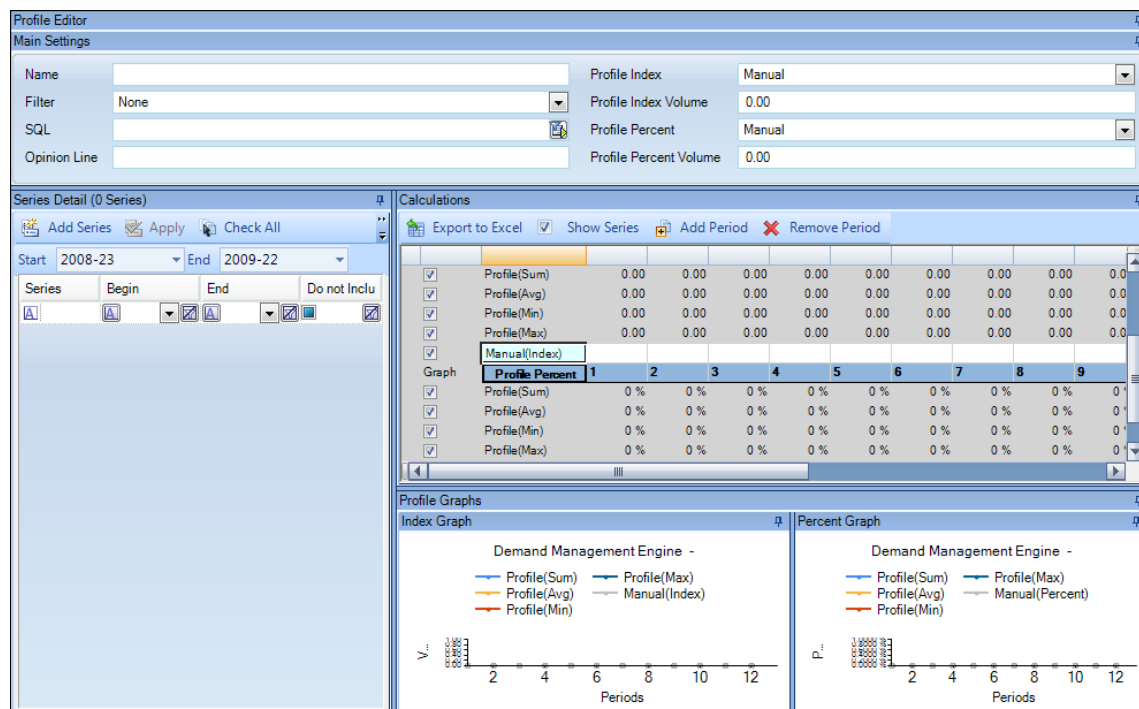
To create a new profile, select one or more items from the scenario that is currently open and based on the data for those series you will choose the best profile from the options available.

- 1 On the **Home** menu, click the **Profile** button in the **Forecast** section.

The **Profile Manager** window displays.



- 2 Click the **New** button. The fields in the **Profile Editor** section are cleared.



Main Settings

This section is used to configure a filter assigned to the profile, which opinion line is used to calculate the profile among others:

3 The **Main Settings** section contains the following options:

Main Settings

Name

New Profile

Filter

Forecast v. Sales

SQL

([Series].[UserField5] = 'Sales Fcst v Fcst > 50%')

Opinion Line

Adj Hist

Profile Index

Avg

Profile Index Volume

4,453.70

Profile Percent

Min

Profile Percent Volume

3,808.00

Table 9.1

Option	Description
Name	Use this field to specify a name for the Profile being created.
Filter	You can add series to the profile manually or you can use this drop-down list to select an existing filter. When you select a filter, any series that meets the filter criteria will be automatically added in the Series Detail pane. The data from the series meeting this filter’s criteria will be used to calculate the profile.
SQL	This field will display the structure of the filter statement selected from the Filter drop-down list above.
Opinion Line	This field is used to select which opinion line or data line is used to calculate the profile. The data in this opinion line for the periods specified in the Series Detail pane will be included for all series that have been selected in the Series Detail pane.

Table 9.1

Option	Description
Profile Index	Specifies which of the available Index calculations will be used as the Profile's Index values. A Profile Index is a curve that is built using the average volume by period. An index of "1" represents the average volume. An index of "1.5" is the average volume plus half the average volume, while an index of ".5" is half the average volume. To use an index, the user must know what they want to use as an average volume per month. When configuring an item to use the Lifecycle forecast method, you will use either an Index or Percent calculation. This option defines what the Index calculation would be for the profile. The results of each of the following calculations can be viewed in the Calculations pane: • Manual - This option allows you to enter a value for each period manually in the Manual (Index) line on the Calculations pane. • Avg - Use the average Index calculation of all the selected series. The total volume for this calculation will be displayed in the Profile Index Volume field in the Main Settings. • Min - Use the minimum Index calculation of all the selected series. The total volume for this calculation will be displayed in the Profile Index Volume field in the Main Settings. • Max - Use the maximum Index calculation of all the selected series. The total volume for this calculation will be displayed in the Profile Index Volume field in the Main Settings. • Specific Series - Once series are added to the Series Detail pane, each of these series will display in this drop-down list. This allows you to use the Index calculation for one specific series instead of the Avg, Min or Max calculations which include all selected series.
Profile Index Volume	This field displays the Total Volume for the selected Profile Index using the selected index type (i.e., Manual, Avg, Min, Max or a specific series). This field is read only.

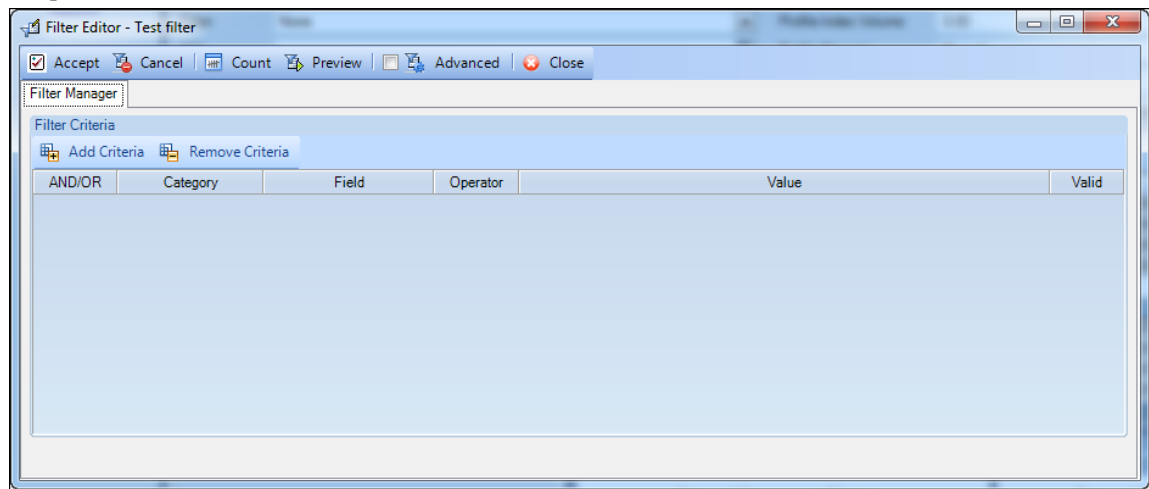
Table 9.1

Option	Description
Profile Percent	Specifies which of the available Percent calculations to use as the Profile's Percent values. A Profile Percent is a curve that is built using the total volume during the periods to which the curve is applied. To use the profile percent, users must know what they want the total volume to be over the periods. For example, if the profile is to be applied over 12 periods and the user chooses a volume of 1000, the volume over the 12 periods will total 1000 when using this profile's curve. When configuring an item to use the Lifecycle forecast method, you will use either an Index or Percent calculation. This option defines what the Percent calculation would be for the profile. The results of each of the following calculations can be viewed in the Calculations pane: • Manual - Enter a value for each period manually in the Manual (Percent) line on the Calculations pane. • Avg - Use the average Percent calculation of all the selected series. The total volume for this calculation will be displayed in the Profile Percent Volume field in the Main Settings. • Min - Use the minimum Index calculation of all the selected series. The total volume for this calculation will be displayed in the Profile Index Volume field in the Main Settings. • Max - Use the maximum Percent calculation of all the selected series. The total volume for this calculation will be displayed in the Profile Percent Volume field in the Main Settings. • Specific Series - Once series are added to the Series Detail pane, each will display in this drop-down. Uses the Percent calculation for a specific series instead of the Avg, Min, or Max calculations which use all selected series.
Profile Percent Volume	This field displays the Total Volume for the selected Profile Percent using the selected index type (i.e., Manual, Avg, Min, Max or a specific series). This field is read only.

Series Detail

In the Series Detail section you can view which are the available

- 4 If you have already added all the series you want by using a filter you can skip to step 7. If you wish to add more series to the **Series Detail** section, click the **Add Series** button.
- The **Filter Editor** window displays and allows you to select the series used to create this profile.

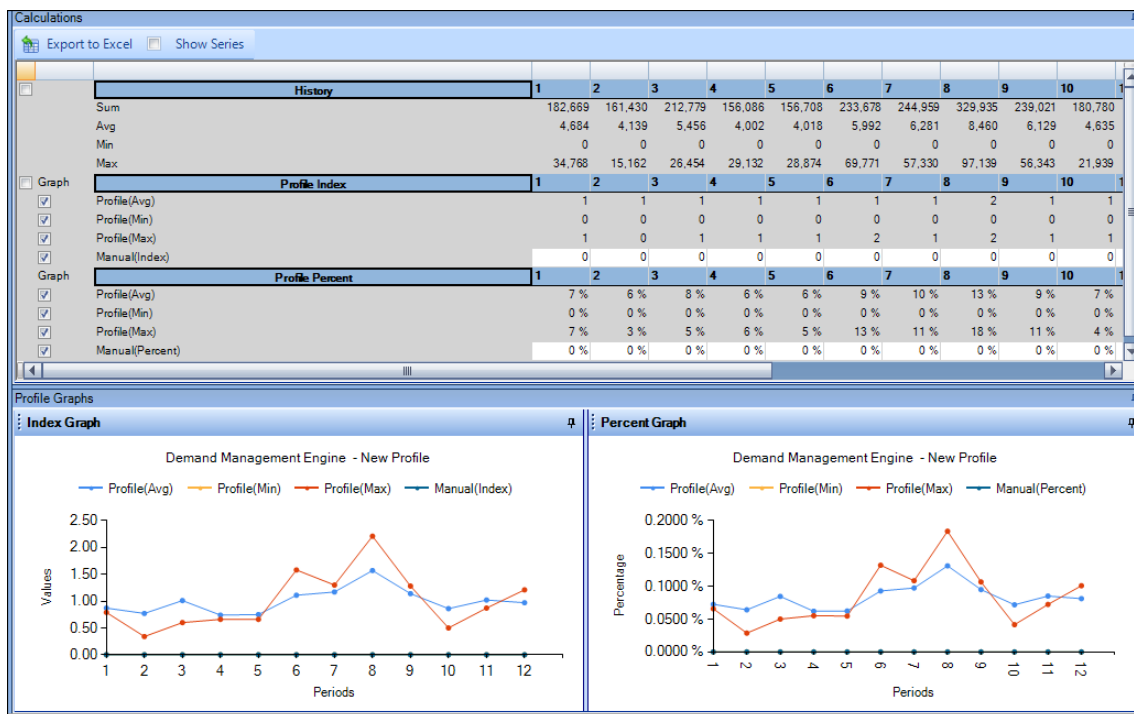


- 5 Click the **Add Criteria** button and select the criterion for the Series you want to use in the profile.
- 6 Click **Accept**.
- The Filter Editor window closes and any series meeting your filter criteria will display in the Series Detail section.

Series	Begin	End	Do not Incl
10461052...	2008-23	2009-22	☒
10461052...	2008-23	2009-22	☐
1649492C...	2008-23	2009-22	☐
1649492C...	2008-23	2009-22	☐
1664729C...	2008-23	2009-22	☐
1664729C...	2008-23	2009-22	☐
1688312C...	2008-23	2009-22	☐
1688312C...	2008-23	2009-22	☐
1807339C...	2008-23	2009-22	☐
1807339C...	2008-23	2009-22	☐
1807455C...	2008-23	2009-22	☐
1807455C...	2008-23	2009-22	☐
1825181C...	2008-23	2009-22	☐
1825181C...	2008-23	2009-22	☐
1825685C...	2008-23	2009-22	☐
1825685C...	2008-23	2009-22	☐
1830606C...	2008-23	2009-22	☐
1830606C...	2008-23	2009-22	☐

- 7 Use the **Start** and **End** drop-downs to indicate the date range of series to display. The range selected here will be applied to every series in the list but can be manually changed for specific series. This range specifies the range of data that is used for the calculations in each series.
- 8 Use the check box in the **Do Not Include** column to indicate any series that should not be included in the profile.
- 9 Click the **Apply** button to update the Calculations pane and include any new series you added or to update the calculations if you changed the range.

The data from the selected series is applied to the **Calculations** and **Profile Graphs** sections of the screen.



Note The Profile Index Volume and Profile Percent Volume fields in the Main Settings section are also populated based on the selected profile.

- 10 Select the **Show Series** check box to display data for the individual series in addition to the Sum, Avg, Min, and Max values.
- 11 The fields in the **Manual (Index)** and **Manual (Percent)** rows are editable. Click on any field in these rows to manually enter values. You can also copy and paste data from other rows into these fields.
- 12 You can also the **Export to Excel** button to save the data in the Calculations section to a spreadsheet.
- 13 Click **Save** when finished.

Applying a Profile

- 1 In the Viewer, open the Scenario that will use the Life Cycle Forecast.
- 2 On the **ForecastX Methods** tab in the **Misc. Window**, select “Lifecycle” as the Method.
- 3 Click the **Edit Item** button.

The **Forecast Settings** window displays.

Profile	Begin Date	End Date	Profile Sta	Profile En	Recycl	Type	Operation	Volume	Valid
New Profile	2008-07	2009-07	1	24	☐	Index	User Overwrite	44.00	

- 4 Click the **Add Item** button in the **Profiles** section to add a profile to this forecast.
- 5 Select the **Profile** to use from the drop-down list.
Note If this field is blank, the UserField1 Attribute of the Profile Scenario is not set to “Profile”.
- 6 Select the **Begin Date** and **End Date** periods to indicate the data range to be forecasted.
Note Users have the ability to apply multiple Profiles to a single Series by selecting start and stop dates that do not overlap one another.
- 7 Use the **Profile Start** field to select the first period within the profile data to use. In most cases, the start period for Profile Series matches the start period for the Series.
- 8 Use the **Profile End** field to indicate the last period of profile data to apply.
- 9 Use the **Recycle** check box to indicate the behavior of the lifecycle forecast when there are not enough data points in the Profile Series.
For example, the data range is two years, but the Profile only has one year of data for the Seasonal pattern:
 - If the Recycle checkbox is not selected, the value for the last period of the remaining periods is reused.
 - If the Recycle checkbox is selected, the values from the beginning of the profile series are used.
- 10 Use the **Type** drop-down to indicate if you are using an Index or Percent profile.
- 11 The **Operation** field indicates the value selected for this Type in the profile record; i.e., Avg., Min, Max, or Sum. This field cannot be edited on this screen.

- 12 The **Volume** field defaults to the value in the Profile Index Volume or Profile Average Volume saved in the profile, but can be edited manually.

Note Click the Show Profile Editor button to view or edit the selected profile.

- 13 Click **Save**. The Forecast Settings window closes.

- 14 On the ForecastX Method tab, right-click on the Lifecycle Forecast and select “Run ForecastX for Opinion Line”.

Using the Event Manager

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Creating Events 167

Event Management 172

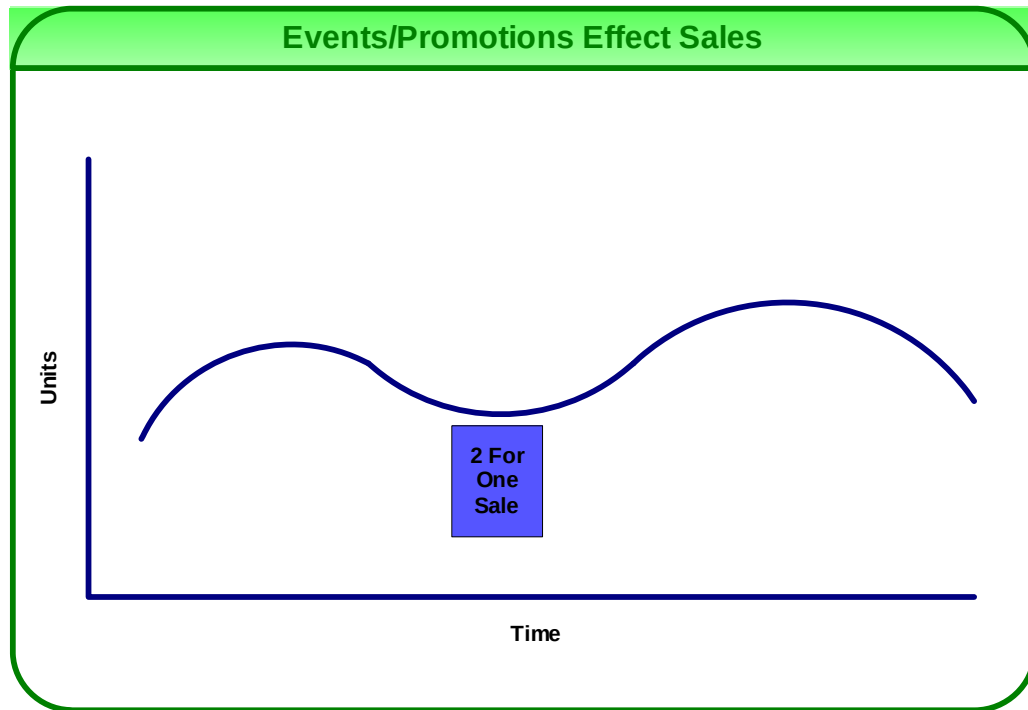
Overview

Events are special situations or actions that can change forecasting behavior. Events could include promotions, a new store start up, a plant shut down or other situations that affect “normal” or base demand.

An event may be applied to any series, and a series may be linked to any number of events at the same time. For example, you could have a newspaper add one week and an in-store promotion another that impact the month’s total demand.

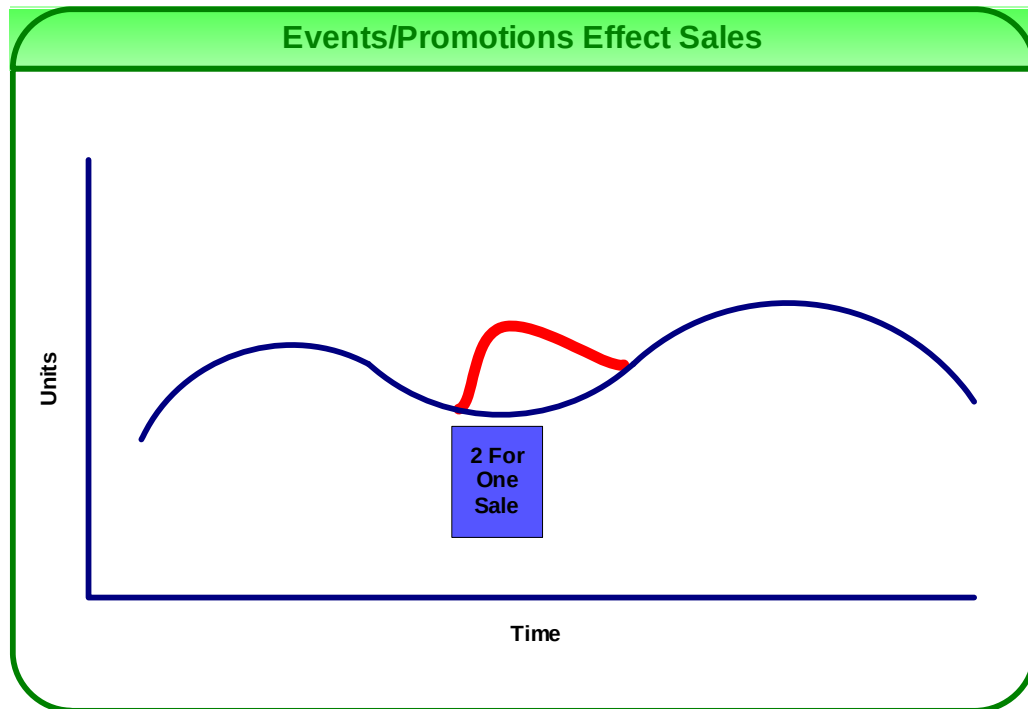
The Event Manager enables users to apply their business knowledge concerning the impact of outside events on the forecast data. By using the Event Manager, you can define, track and apply outside events.

The following figure depicts the Base Forecast prior to the event being applied. This is a typical situation where a Promotion is run during a time when sales are slow. The Event Manager enables you to document the assumptions and the effect of the promotion on the forecast.



In both of these figures, the event has directly changed the calculated forecast. Once the location and timing of the event is placed, then the details of the event must be worked out to quantify the effect and the duration. The Event Manager enables this to take place. When the event is put in place, the adjustment to the forecast can be noted and tracked.

The following figure depicts the effect of the 2-For-One sale on the Forecast.



By tracking and managing the promotion, the Forecasting process begins to track the assumptions and impacts of marketing and business factors to the forecast.

Before moving on, some basic terminology requires definition.

Table 10.1

Term	Description
Lift	The absolute percentage representing the change in the statistical forecast before and after applying the event. This value can also be an amount.
Promotion	A particular set of events that one uses to increase sales over the current sales.
Forecast Layers	The effect of several events.

Creating Events

The purpose of Event Management is to give demand planners a method for marking past and future business events that impact sales. Events can have a positive or negative effect on demand and tracking them can improve forecast accuracy.

The Event Manager screens in DME allow you to make adjustments to a forecast based on an event occurring in future periods, as well as marking a past event, calculating the impact, and then copying that impact to a future period.

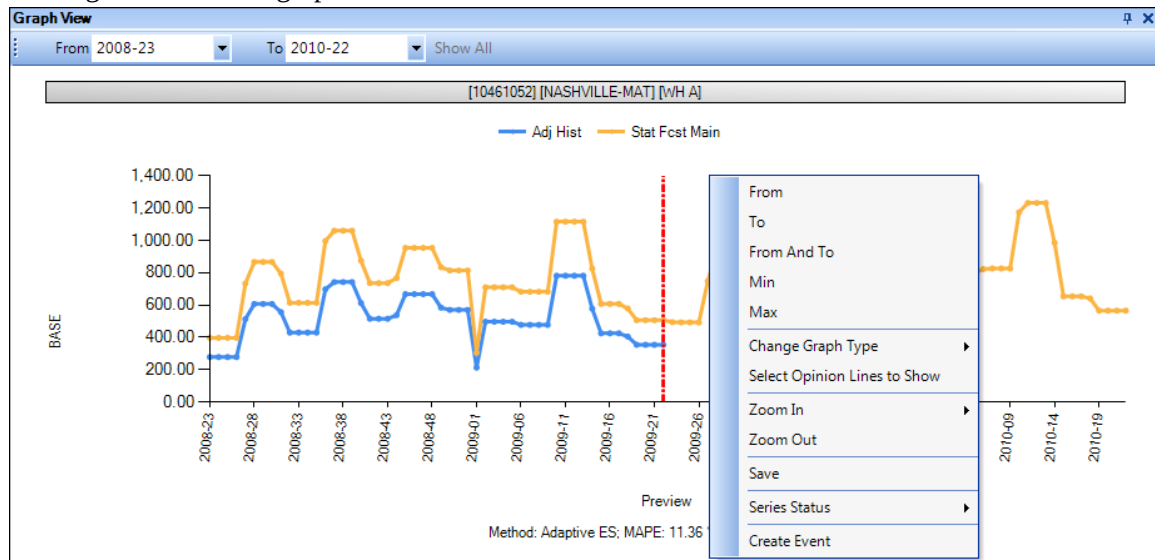
There are multiple ways to access Events in the DME Viewer. For example, the user can create and apply Events in the Graph or Data Views, including user created views. The Event Manager screen allows users to browse existing events, add new events, and analyze the profitability of past and future events.

Creating an Event from the Viewer

The Graph View in the DME Viewer can be used to create Events and apply them to periods.

15 Select one or more series to display in the Viewer.

16 Right-click on the graph and select “Create Event”.



17 The **Event Settings** window displays.

Event Settings - K-MART

Save Close

Main

Event Id 7

Name

Description

Category

Market Spend 0.00

Application Type Additive

Adjustment

Adjustment Percentage

Adj. Value 0.00

Event Dates

Dates

18 The **Event ID** field is system generated and cannot be edited.

19 Enter a **Name** and **Description** for this event.

20 Select a **Category** for this Event from the drop down list.

Event Settings - [10461052]

Save Close

Main

Event Id 6

Name Spring Sale

Description Annual Spring Sale

Category

Categories

Name	Symbol	Color
BOGO		Red
Holiday		Yellow
Price	\$	Green
Promotion		Blue
Sales		Orange

Event Dates

Dates

Event Categories are created in the DME Admin Tool and can be applied to any Event.

21 If desired, enter the **Market Spend** to indicate the cost of the promotion or event.

22 Use the **Application Type** drop-down to indicate if the Event is “Additive” or “Multiplicative”.

Additive will add the amount to the forecast and Multiplicative will create an amount calculated as a percentage of the forecast.

23 In the **Adjustment** section, select the type of adjustment being made in this Event.

Adjustment	
Adjustment	Percentage
Adj. Value	Amount Percentage Statistical

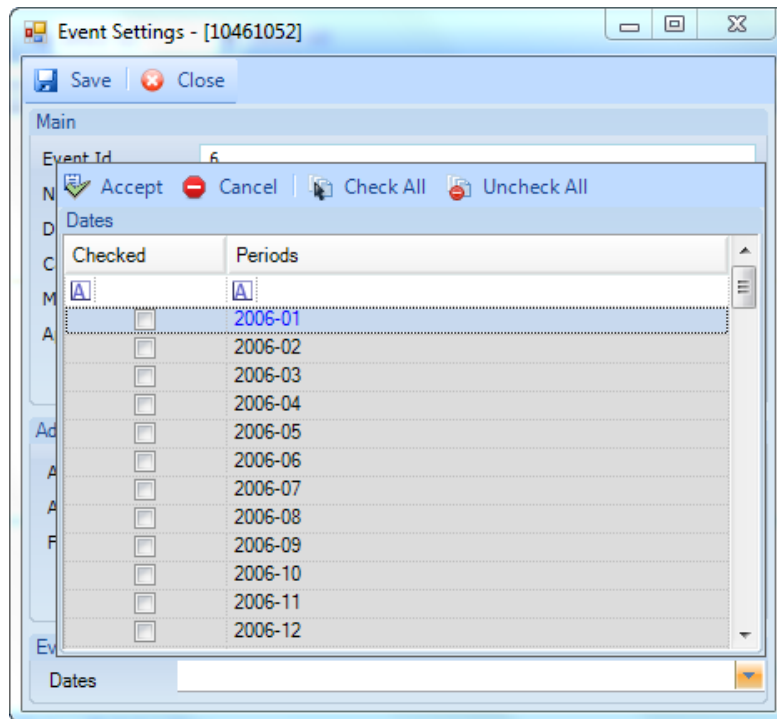
Possible values are:

- **Amount** - add the specified amount to the existing value.
- **Percentage** - adds a percentage of the existing value. Percentage is the Default Value.
- **Statistical** - used to run the Event Model on history data. When using a “Statistical” adjustment, you must select past events.

Note If “Statistical” is selected as the Adjustment type, the “Adj. Value” and “Application Type” fields will become inactive.

24 Use the **Adj. Value** field to indicate the amount of the adjustment.

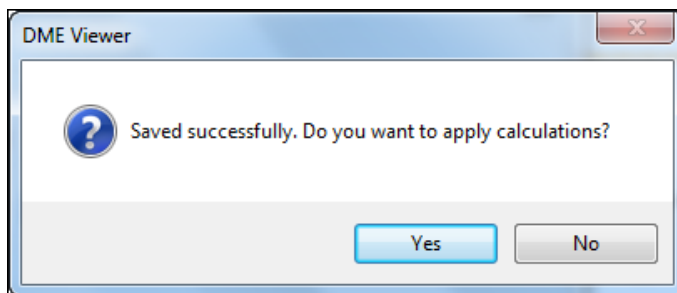
- 25 In the **Event Dates** section, use the Date(s) drop-down to select the dates to which the Event will be applied.



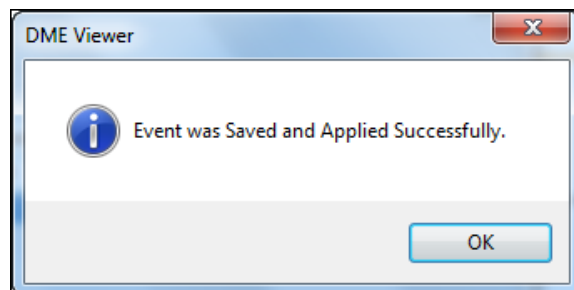
Multiple date values can be selected.

Click the **Accept** button to choose the selected dates.

- 26 Click the **Save** button. The Event is saved and DME will ask you if you want to apply the calculations in this Event.



- 27 Click **Yes** to apply the Event. The DME will confirm that the event was saved and applied.



- 28 The Symbol associated with the selected Event Category will display in the Graph View for the periods selected.

Event Management

The Event Manager in the DME Viewer is the primary source for defining and launching forecasts with events. Using the Event Manager, you can create, remove, display, copy and edit events; as well as review financial results.

Events are assigned to individual series using Event Categories created in the DME Admin Tool. Only the owner who created the event can delete or update it.

Overview

The Event Manager is comprised of two panels: the Event List and the Event Editor. The Events List displays a list of existing events in the left panel. The Event Editor displays in the right panel and is used to create or edit events. On the Event Editor there are six tabs:

- **Event View** – Used to create new events and apply them to one or more series, including selection by filter or for the scenario ([See “Event View Tab” on page 173.](#))
- **Event Index** – Used to create and apply an event index to one or more series, including selection by filter or for the scenario. The Event Index is an opinion line used to indicate multiple events index by period. This index is only used with the statistical event type and the Event Model forecast method. ([See “Event Index Tab” on page 177.](#))
- **Series View** – Allows the user to filter the series displayed to view assigned events, and apply events, to one or more series. ([See “Series View Tab” on page 179.](#))
- **Lift Analysis** - Used when running Event Model. This tab shows the lift factors calculated from history when users select the Statistical type selection. ([See “Lift Analysis Tab” on page 182.](#))
- **Margin Analysis** – Shows the former and new forecasts, event adjustments, costs, and margins by series for a selected event. ([See “Margin Analysis Tab” on page 183.](#))
- **Event Summary** – Shows a summary of multiple events, including sales before and after the event is applied, along with costs and margins. ([See “Event Summary Tab” on page 185.](#))

Event View Tab

- 1 Click the **Event Manager** icon in the toolbar menu and select the Show Manager button from the drop-down.

The **Event Manager** window displays.

Event Manager - 02-LM-Sales

Toolbar: New, Save, Delete, Refresh, Reset UI, Close

Event List

Name	Type	Id	Col
BOGO spring e...	Percentage	17	
Coupon	Statistical	9	
Coupon 2	Amount	11	
Coupon_Copy19	Statistical	10	
Newspaper ad...	Percentage	19	
Promo	Statistical	3	

Event Editor

View | Index | Series View | Lift Analysis | Margin Analysis | Event Summary

Main Settings

Event Id: 17
 Name: BOGO spring event
 Description:
 Category: BOGO
 Market Spend: 0.00
 ApplicationType: Additive

Lift Settings

Lift Settings: Adjustment: Percentage, Adj. Value: 0.10
 Dates: 2008-03 ... 2008-04

Forecast Preview

Scenario Level: Series Applied: Filter: A - LF From: 2009-07 To: 2010-12

Page: 1 of 1 Opinion Line Selector Export to Excel

Series	Opinion Lines	2009-07	2009-08	2009-09	2009-10	2009-11
K-MART.CR35058.PURDUE MAT	Act Hist					
	Stat Fcast Main	905	1038	1156	1104	1149
	01-Judgement					
	02-Event Vol					
K-MART.GY1R12538.WEST CHESTER MAT	Act Hist					
	Stat Fcast Main	0	2	9	5	0
	01-Judgement					
	02-Event Vol					

Existing Events will display in the Event List panel at the left. Selecting an Event from this list will display the details in the Event Editor to the right.

- 2 To create a new Event, click the **New** button on the View tab.

Event Editor

View | Index | Series View | Lift Analysis | Margin Analysis | Event Summary

Main Settings

Event Id: 3 | Category: BOGO
 Name: Promo | Market Spend: 0.00
 Description: | Application Type: Additive

Lift Settings

Lift Settings: Adjustment: Statistical | Adj. Value: 0.00
 Dates: 2009-05

Forecast Preview

Scenario Level | Series Applied | Filter: A - LF | From: 2009-07 | To: 2010-12 | Only Event Dates | Refresh

Page: 1 of 1 | Opinion Line Selector | Export to Excel

Status : Applied | Filter Used : Not used. | 1 record(s) found.

Note The ID field is system-generated and pre-populated. The ID is used for customer reference when there is more than one event assigned to a series. The order of the ID specifies the order of how events are applied.

- 3 In the Main Settings section, enter the **Name** and **Description** in the corresponding textboxes.

Note The Name must be unique for all the events created by this user.

- 4 Use the **Category** drop-down to select the desired Event Category for this configuration.

Event Editor

View | Index | Series View | Lift Analysis | Margin Analysis | Event Summary

Main Settings

Event Id: 3 | Category: BOGO
 Name: Promo | Market Spend: | Application Type: |
 Description: |

Lift Settings

Lift Settings: Adjustment: Statistical | Adj. Value: 0.00
 Dates: 2009-05

Forecast Preview

Scenario Level | Series Applied | Filter: A - LF | From: | To: | Only Event Dates | Refresh

Page: 1 of 1 | Opinion Line Selector | Export to Excel

Status : Applied | Filter Used : Not used. | 1 record(s) found.

- 5 Use the **Market Spend** field, if desired, to indicate the cost of the promotion or event.

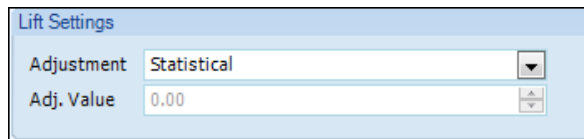
- 6 Select the **Application Type** from the drop-down list.

- 7 In the **Lift Settings** section, use the **Adjustment** drop-down to indicate the type of lift factor. Possible values are:

- **Amount** - add the specified amount to the existing value.
- **Percentage** - adds a percentage of the existing value. Percentage is the Default Value.
- **Statistical** - used to run the Event Model on history data. When using a “Statistical” adjustment, you must select past events.

Note If “Statistical” is selected as the Adjustment type, the “Adj. Value” and “Application Type” fields will be inactive.

- 8 In the **Adj. Value** field, enter the lift factor or amount for the selected Adjustment type.

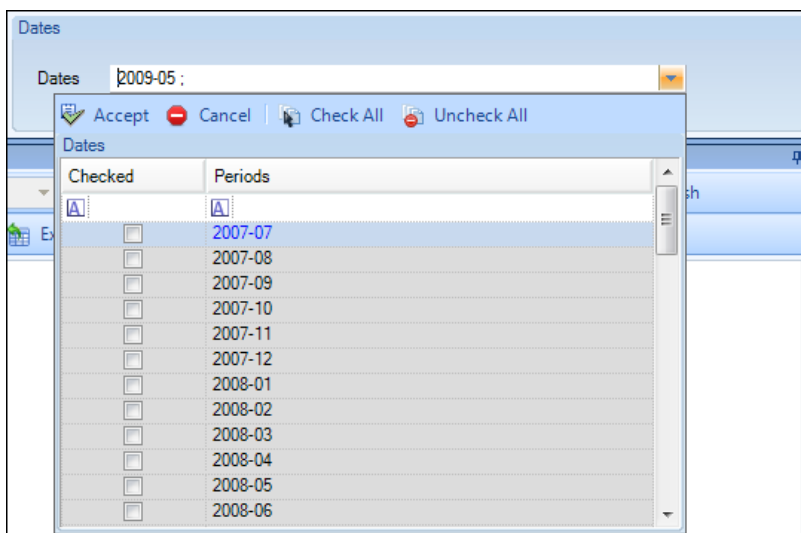


Lift Settings

Adjustment: Statistical

Adj. Value: 0.00

- 9 Click on the **Dates** field and use the drop-down list to select the periods to which this Event will be applied.



Dates

Dates: 2009-05

Accept Cancel Check All Uncheck All

Checked	Periods
☒	2007-07
☐	2007-08
☐	2007-09
☐	2007-10
☐	2007-11
☐	2007-12
☐	2008-01
☐	2008-02
☐	2008-03
☐	2008-04
☐	2008-05
☐	2008-06

Use the check boxes in the **Checked** column to select individual periods, or use the **Check All** button to select all periods. Click the **Accept** button when finished.

- 10 The **Forecast Preview** panel shows the impact of the Event based on the current settings.

The screenshot shows the 'Forecast Preview' window with the following data:

Series	Opinion Lines	2007-08	2008-02	2008-05
CUSTOMER 1.BLEND-106	Act Hist	1902	1716	2124
	Adj Hist	1712	1544	1912
	01-Baseline	1539	1913	1750
	05-Events			
	03-Promo	190	172	212
	04-Consensus Fcst	1730	2084	1962

At the bottom of the window, it states: Status: Not Applied, Filter Used: Not used, 1 record(s) found.

The data impacted by the Event will display in the color corresponding to the selected Category. In the example above, this would be the “2009-03” period highlighted in blue.

- 11 Use the **Scenario Level** to select the series displayed and for which the Event will be applied
 - User Filter - Select Use Filter to select a Filter from the activated drop down to apply to all series within the Filter
 - Selected Series - to show the current highlighted series
 - Select the scenario name to apply to all series in the scenario
- 12 Use the **From** and **To** drop-downs to select the range of periods included in the preview.
- 13 Click the **Only Event Dates** button to show only event dates instead of a date range.
- 14 Click the **Refresh** button to update the preview with any changes.
- 15 Use the arrow keys to scroll through the pages of series in order to preview how this Event will impact the data.
- 16 Click the **Opinion Lines Selector** button to open the selection window and choose the lines to show in the forecast preview.
- 17 When finished, click the **Save** button. The Event is saved and added to the Event List.
- 18 The system will ask if you want the calculations in this event to be applied. Click **Yes** to apply the Event or click **No** to cancel.
- 19 If the Event is applied, the selected data will be updated based on the characteristics of the Event. This includes updating the adjusted history, forecast baseline and re-balancing as needed.

Event Index Tab

The Event Index tab is used to create and apply an event index to one or more series, hierarchy, or scenario. The Event Index is an opinion line used to indicate (the id number of) multiple events over a span of time and is only used with the statistical event type and the Event Model forecast method. You must have Statistical Events already created in order to create an Event Index.

- 1 In the Event Manager window, click the **Index** tab.

View **Index** **Series View** **Lift Analysis** **Margin Analysis** **Event Summary**

Main Settings

Event Id: 8 Category: Index
 Name: Market Spend: 0.00
 Description:

Index Setting

Year	Period 01	Period 02	Period 03	Period 04	Period 05	Period 06	Period 07	Period 08
2007								
2008								
2009								
2010								

Forecast Preview

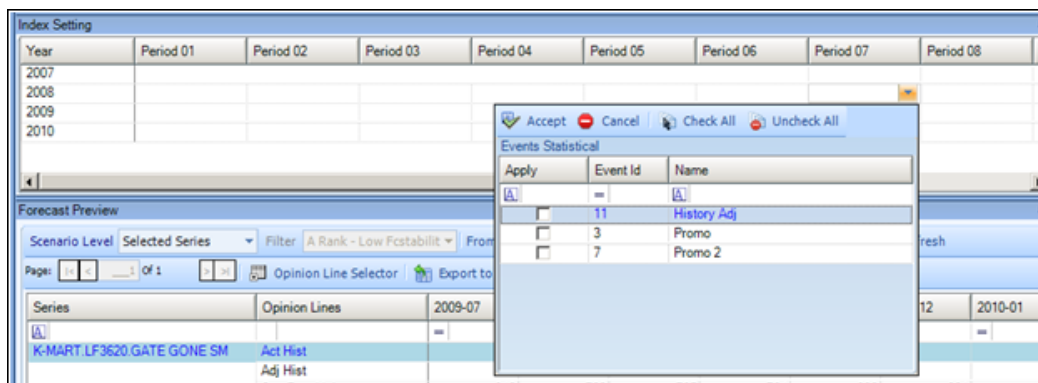
Scenario Level: Selected Series Filter: A - LF From: 2009-07 To: 2010-12 Only Event Dates Refresh

Page: 1 Of 1 Opinion Line Selector Export to Excel

Status : Not Applied Filter Used : Not used.

- 2 Click the **New** button to define a new Index event assignment.
Note The ID field in the Main Settings section is system-generated and pre-populated. and description of the event. The ID is used for customer reference when there is more than one event assigned to a series. The order of the ID specifies the order of how events are applied.
- 3 In the Main Settings section, enter a **Name** and **Description** for the Event in the corresponding textboxes.
- 4 The **Category** field defaults to “Index”.
- 5 Use the **Market Spend** field, if desired, to indicate the cost of the promotion or event.

- 6 The **Index Setting** section allows you to assign statistical events to individual periods. Click on a year and an individual period and use the drop-down to select the Event to assign to this period.



Use the check box in the **Apply** column to select an Event and then click **Accept** to assign it to this period.

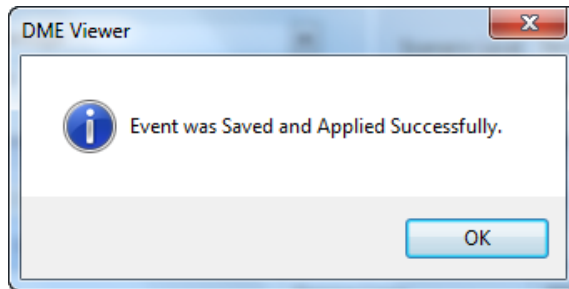
- 7 The **Forecast Preview** panel shows the impact of the Event based on the current settings. Click the **Refresh** button to populate this section based on the settings selected above.

Series	Opinion Lines	2010-03	2010-04	2010-05	2010-06	2010-07	2010-08	2010-09
K-MART.LF3620 GATE GONE SM	Act Hist							
	Adj Hist							
	Stat Fcst Main	277	643	410	200	924	702	71
	01-Judgement	0	0	0	0	0	0	0
	02-Event Vol	0	0	0	0	0	0	0
	03-Planner Fcst	277	643	410	200	924	702	71

The data impacted by the Event will display in the color corresponding to the selected Category. In the example above, this would be the “2009-03” period in yellow.

- 8 In the Forecast Preview section use the **Scenario Level** drop-down to assign the Event to a specific series, Scenario or select “Use Filter” to apply this Event to data meeting the selected filter criteria.
- 9 Use the **Filter** drop-down to select a saved filter to apply to the series in the preview when “Use Filter” is selected in the Scenario level.
- Note** The Filter field will only be active if “Use Filter” is selected from the Scenario Level drop-down.
- 10 Use the **From** and **To** drop-downs to select the range of periods to be included in the preview.
- 11 You can use the arrow keys to scroll through the pages of series to preview of how this Event will impact the data.
- 12 Click the **Opinion Lines Selector** button to open the selection window and choose the lines that will appear in the forecast preview.

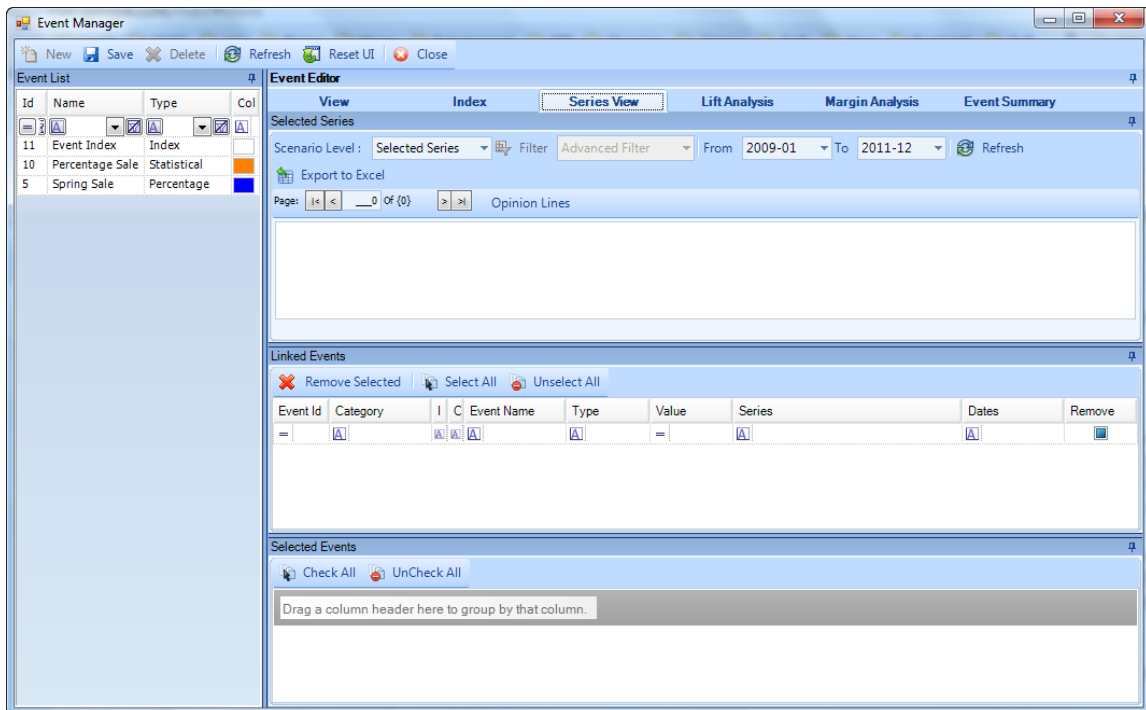
- 13 Click the **Only Event Dates** button to show only event dates instead of all periods in the date range.
- 14 Click the **Refresh** button again to update the preview with any changes.
- 15 When finished, click the **Save** button. The Event is saved and added to the Event List. The following message box will display:



Series View Tab

The Series View tab allows the user select the series to view data, as well as view, remove and apply events.

- 1 In the Event Manager window, click the **Series View** tab.



- 2 In the **Selected Series** section, use the **Scenario Level** drop-down to select the level at which information will be viewed and Event can be applied., such as a Scenario, to Selected Series, or to series meeting filter criteria ("Use Filter").
- 3 The **Filter** drop-down allows you to select a saved filter to apply to the series in the preview. The Event will only be applied to series meeting the selected filter criteria.

Note The Filter field will only be active if “Use Filter” is selected from the Scenario Level drop-down.

- 4 Use the **From** and **To** drop-downs to select the range of periods to be included in the preview.
- 5 Click the **Refresh** button to update the preview.

The screenshot shows the 'Selected Series' window with the following data:

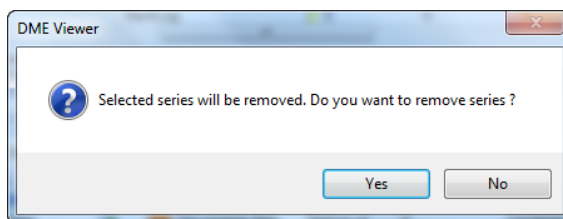
Series	Opinion Lines	2009-04	2009-05	2009-06	2009-07	2009-08	2009-09	2009-10
K-MART.LF3620 GATE GONE SM	Act Hist	625	375	200				
	Adj Hist	625	375	200				
	Stat Fcst Main	680	431	203	1550	1137	1172	
	01-Judgement	0	0	0	0	0	0	0
	02-Event Vol	0	0	0	0	0	0	0
	03-Planner Fcst	594	522	251	1550	1137	1172	

- 6 You can use the arrow keys to scroll through the pages of series and preview how this Event would impact the data.
- 7 Click the **Opinion Lines Selector** button to open the selection window and choose the lines that will appear in the forecast preview.
- 8 Click the **Refresh** button to update the preview with any changes.
- 9 The **Linked Events** section displays a list of the Scenarios and Periods

The screenshot shows the 'Linked Events' window with the following data:

Event Id	Category	I	C	Event Name	Type	Value	Series	Dates	Remove
9	BOGO			Promo Sales	Percentage	25	TARGET.1688312C1 SUPER ROCK 101	2009-10-	☒
11	Price Increase			History Adj	Statistical	0	TARGET.1688312C1 SUPER ROCK 101	2008-09-	☐
7	Promo			Promo 2	Statistical	0	TARGET.1688312C1 SUPER ROCK 101	2008-07 ; 2009-01-	☐

- 10 To remove an event from the series to which they are assigned, select the check box in the Remove column. Click the **Remove Selected** button and DME will ask you to confirm the removal.



Click “Yes” and the selected events are removed.

11 To change the dates for a selected event, click on the **Dates** field.

Selected Series

Scenario Level: Whole Tree Filter: A - LF From: 2010-01 To: 2010-12 Only Event Dates Refresh

Pages: 1 Of 14 Opinion Line Selector Accept Cancel Check All Uncheck All

Series	Opinion Lines	201
	Adj Hist	
	01-Judgement	
	03-Planner Fcst	
WALMART.1825685C1.STRATHMER	Act Hist	

Dates

Checked	Periods
☐	2007-07
☐	2007-08
☒	2007-09
☒	2007-10
☒	2007-11
☒	2007-12
☐	2008-01
☐	2008-02
☐	2008-03
☐	2008-04
☐	2008-05
☐	2008-06

Linked Events

Remove Selected Select All Unselect All

Event Id	Category	I	C	Event Name	Type
=					
9	Promo			Spring Sale	Amount
9	Promo			Spring Sale	Amount
9	Promo			Spring Sale	Amount
9	Promo			Spring Sale	Amount

12 Use the check boxes in the **Checked** column to select additional periods and click **Accept**.

13 Click **Save**. DME will ask if you want to apply the calculations.

14 Click **Yes**. The Event will be calculated and applied to the selected periods.

15 The Event will also be displayed in the **Selected Events** section.

Selected Events

Select All Unselect All

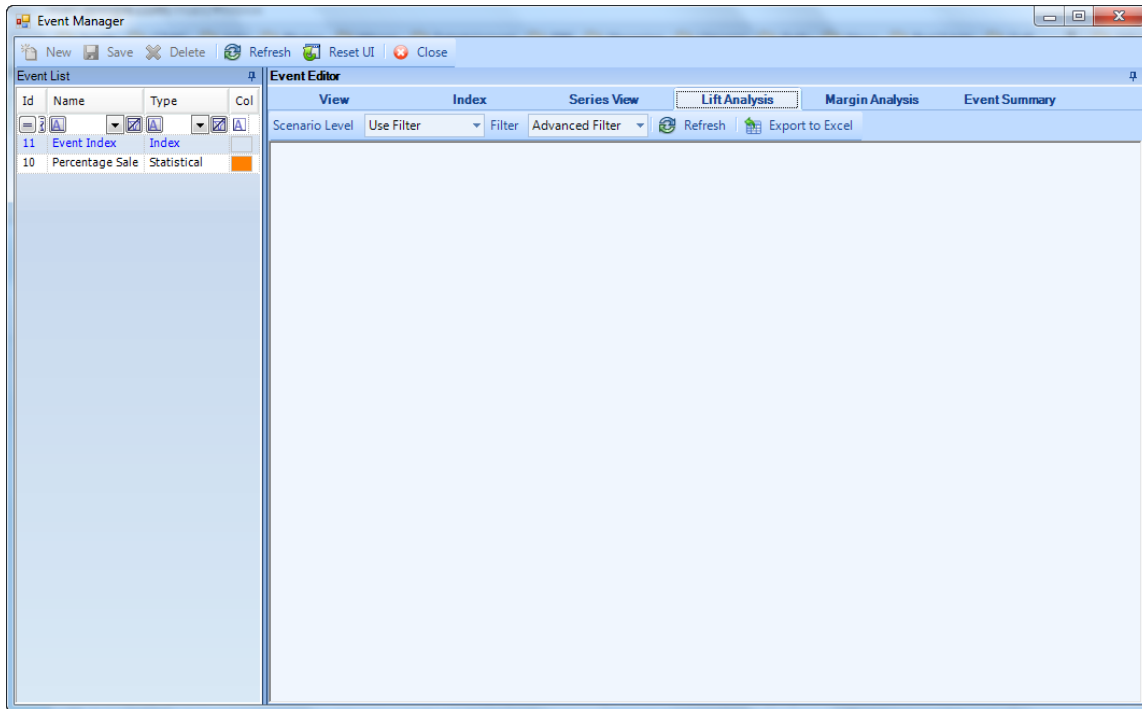
Event Id	Category	I	C	Event Name	Type	Value	Dates	Apply Selected
=						=		
9	Promo			Spring Sale	Amount	12	2007-09 ... 2007-12 :	

16 Use the **Select All** button to select all Events in this panel. Click the **UnSelect All** button to de-select all selected Events.

Lift Analysis Tab

The Lift Analysis tab is used when running Event Model. This tab shows the lift factors for historical periods when statistical events are applied.

- 1 In the Event Manager window, click the **Lift Analysis** tab.



- 2 Use the **Scenario Level** drop-down to indicate the level at which this Event will be applied. You can choose to use Selected Series, a specific scenario, to series meeting filter criteria (“Use Filter”), or use events from the Event List.
- 3 Use the **Filter** drop-down to select a saved filter to apply to the series in the preview.

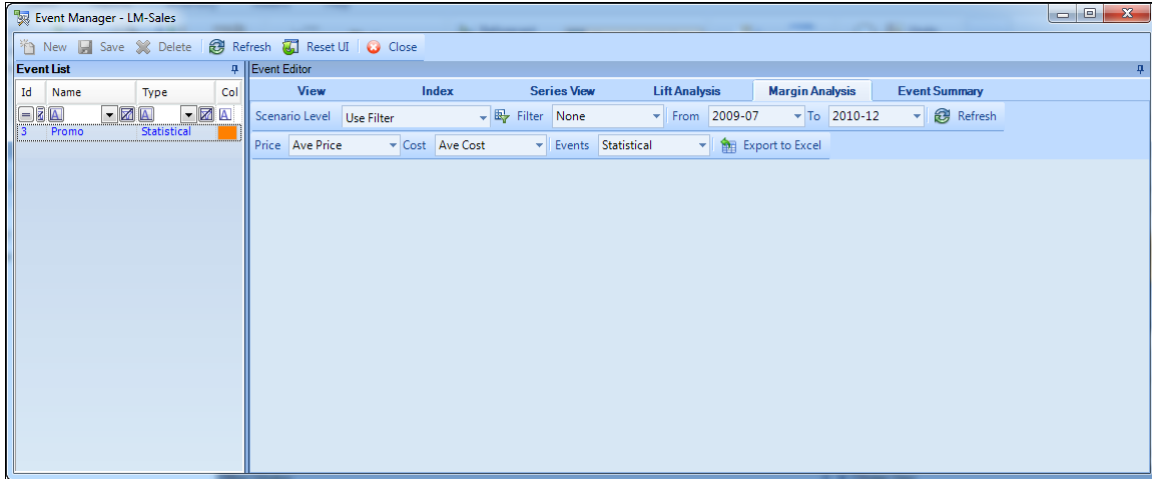
Note The Filter field will only be active if “Use Filter” is selected from the Scenario Level drop-down.
- 4 Click the **Refresh** button to update the view.
- 5 The view displays any series matching the selected criteria and the lift factors that have been calculated.

	2007-10	2007-11	2007-12	2008-01	2008-02	2008-03	2008-04	2008-05
[K-MART] [CR47692] [BLOOMINGTON MAT]	800	2,400	2,200	3,100	1,000	600	1,200	1,600
[K-MART] [EC40PBA] [DANIEL MAT]	19,250	59,375	26,850	13,450	15,575	19,625	24,525	18,350
[K-MART] [FYS206] [MEEDE WACKER SM]	10,175	12,725	9,250	14,575	12,600	12,250	13,500	11,625
[TARGET] [10461052] [NASHVILLE-MAT]	1,363	1,521	1,564	1,385	1,436	3,014	773	700

Margin Analysis Tab

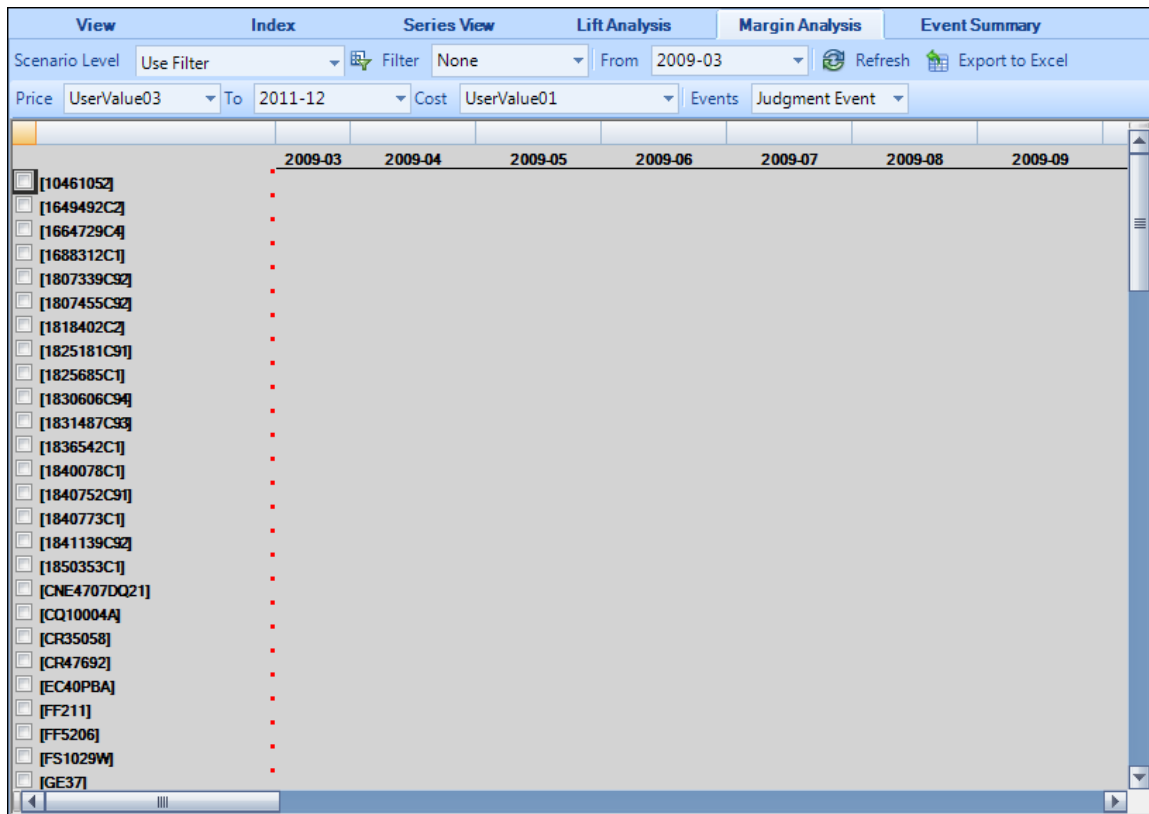
The Margin Analysis tab displays the old and new forecasts, event adjustments, costs, and margins by series for a selected event.

- 1 In the Event Manager window, click the **Margin Analysis** tab.



- 2 Use the **Scenario Level** drop-down to indicate the level at which this Event will be applied. You can choose to use a specific series, scenario, or filter criteria ("Use Filter"), or use events from the Event List.
- 3 Use the **Filter** drop-down to select a saved filter to apply to the series in the preview.
Note The Filter field will only be active if "Use Filter" is selected from the Scenario Level drop-down.
- 4 Use the **From** and **To** drop-downs to select the range of periods to be included in the preview.
- 5 Use the **Price** drop-down to select the opinion line to use as the price.
- 6 Use the **Cost** drop-down to select the opinion line to use as the cost.
- 7 Use the **Events** drop-down to indicate if Judgement Events or Statistical Events should display for the data to review. The events in the Event List panel are updated based on this selection.

- 8 Click the **Refresh** button to update the view and apply these settings to the series selection for view.



- 9 Select the check box for an individual series to expand and view the impact of the events in each period.

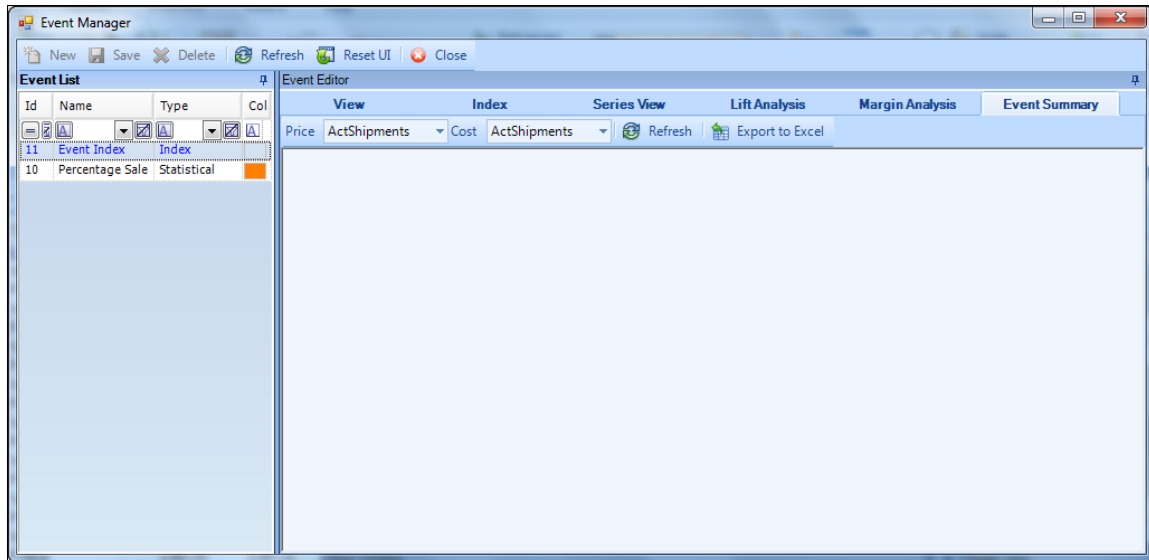
View		Index		Series View		Lift Analysis		Margin Analysis		Event Summary	
Scenario Level		Use Filter		Filter		None		From 2009-03		Refresh Export to Excel	
Price		UserValue03		To 2011-12		Cost		UserValue01		Events Judgment Event	

- 10 Click **Refresh** any time you change selections to update the series data.
- 11 The Totals at the bottom of the screen will also be updated each time the data is refreshed.

Event Summary Tab

The Event Summary Tab shows a summary of multiple events, including the sales before and after the event is applied, along with costs and margins.

- 1 In the Event Manager window, click the **Event Summary** tab.



- 2 Use the **Price** and **Cost** drop-downs to select the opinion lines to use in calculating the effects of the event.
- 3 Click the **Refresh** button. The details for the event are calculated and displayed below.

Event Id	Category	Lift Factor	Old Revenue	New Revenue	Net
22	BOGO	1.25	75,427.96	157,343.75	81,915.79
24	BOGO	1.20	92,838.02	110,576.77	17,938.76
23	Price Increase	0.49	15,386.18	6,567.75	-8,818.43

Demand Management Reports

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Report Manager 201

Overview

There are two different ways the DME runs the Reporting feature:

- A series of Report Templates or pre-defined reports.
- Free-form pivot tables and Excel.

The Predefined Reports are accessed using predefined templates that output data. You can use the Batch Scheduler to run the reports or the Base Unit to run the reports interactively.

When using the Excel based pivot reports, the DME provides wizards that enable you to define reports on the fly or use pre-defined templates that are created by the System Administrator.

The DME also supports customer-specific reporting solutions such as Cognos, Brio, Business Objects or Proclarity. These reporting solutions connect directly to the DME's database and provide additional reporting capabilities.

Create Pivot Reports

To create a Pivot Report, you must have Microsoft Excel 2003® or later installed.

Use one of the following procedures to create a Pivot Report:

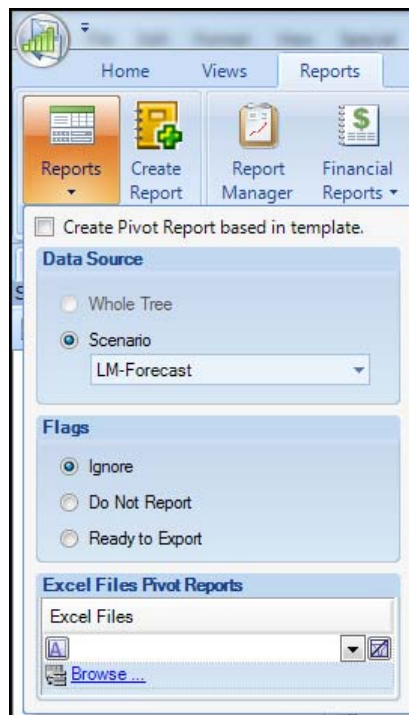
- Open an existing report. You can refresh the report with the current data.
- Create a new report from an existing template in the Template Directory. The current data is used to create the new Scenario.
- Create a new report via Report using the Wizard. The current data is used to create the new Scenario.

The report is created in the DME; this makes the Data Range more manageable. In addition, some security can be applied to the report. Using the assigned permissions, a user can select the data from one of the following:

- Current Scenario.
- All Scenarios visible to the user.

- Specify to ignore, Do Not Report or Ready to Export flag.

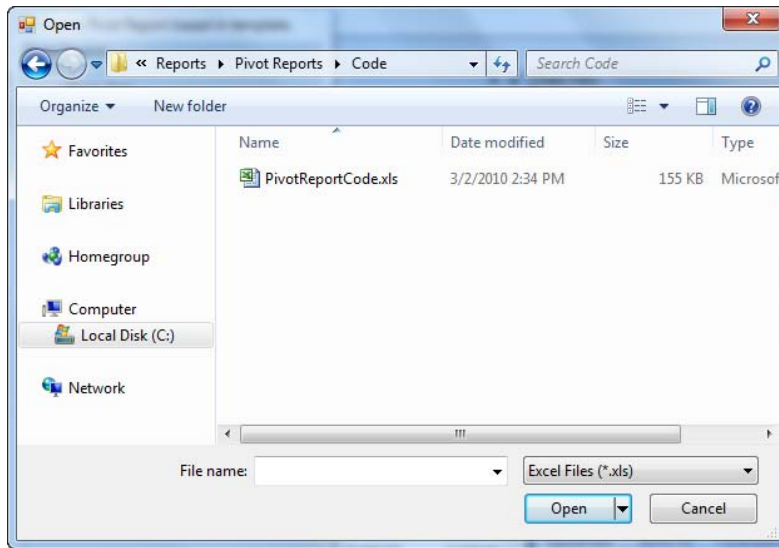
- 1 On the **Reports** tab, click the **Reports** icon to open the drop-down list.



Note When the “Do Not Report” is selected in the Flags area, any series with the Do Not Report series status field set to “True” will not be included in the report.

- 2 Select the **Data Source** to use in generating this report:
 - **Whole Tree** - (default) for applied Hierarchies
 - **Scenario** – select a specific scenario from the drop down list
- 3 Select the appropriate **Flag** to use in the report:
 - **Ignore** – (Default) Ignore all flags in the Demand Management Engine.
 - **Do Not Report** – Ignore all series that are marked “Do Not Report”.
 - **Ready To Export** – Import only those series marked “Ready To Export”.
- 4 Click the **Browse** link at the bottom of the screen to select an Excel report from your hard drive.

The **Open** file window displays.



- 5 Select the *report* and click **Open**.

Once the report is selected, the user has the capability to:

- Refresh existing components.
- Adjust parameter page and data range.

Note You can always refresh a report created from a template or Wizard, and the default location where the reports are stored is C:\Documents and Settings\All Users\Application Data\QAD\Reports\Pivot Reports. The Application Data is a hidden folder by default so if you can't find it in the Windows explorer go to Tools > Folder Options, in the View tab enable the option that says "Show hidden files and folders."

- 6 The report is opened automatically in Microsoft Excel.

Using the Pivot Table Wizard

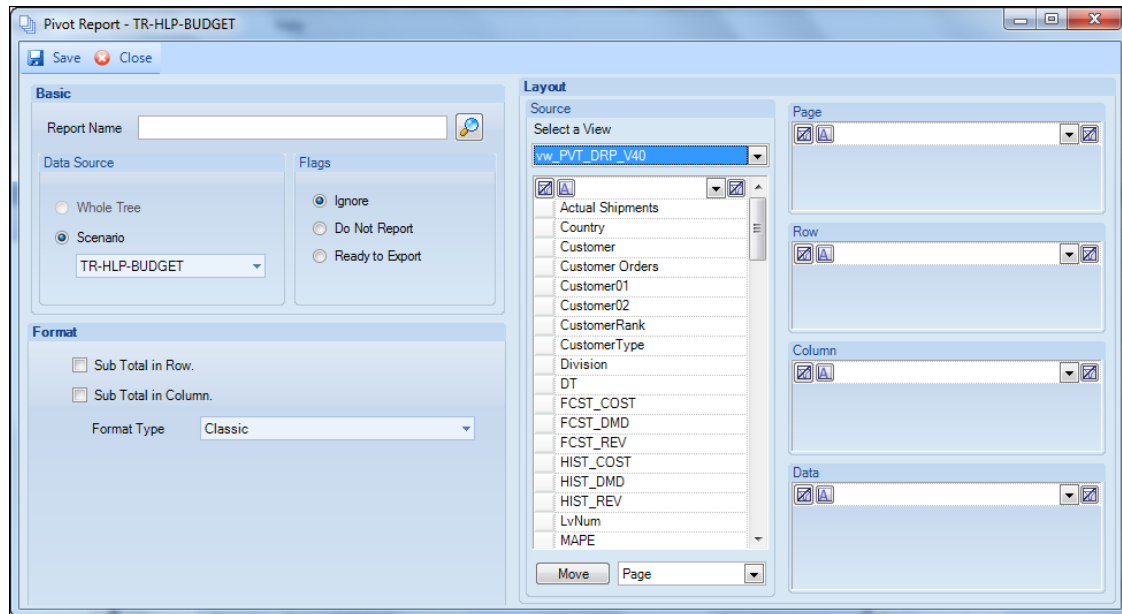
The Pivot Table Wizard requires the following:

- File Name/Path
- Data Source

- Report Type

1 On the **Reports** tab, click the **Create** icon.

The **Pivot Report** window displays.



- 2 In the **Basic** section, enter the **Report Name** or click the  icon to search for an existing report.
- 3 Select the **Data Source** to use in generating the report.
- 4 Select the **Flags** if appropriate.
 - **Ignore** – (Default) Ignore all flags in the Demand Management Engine.
 - **Do Not Report** – Ignore series marked “Do Not Report”.
 - **Ready To Export** – Import only series marked “Ready To Export”.
- 5 In the **Format** section, use the check boxes to indicate where the subtotals are displayed.
- 6 Use the **Format Type** drop-down to select a layout for the report.
- 7 In the **Layout** section, select the fields to use in the report by moving the appropriate fields into the data, column, row, and page fields.
 - The fields used for Data would typically be shipments, orders, and forecast.
 - The fields for column, row and page would be month, year, series attributes such as Customer, Warehouse, or Salesperson.

The layout uses the same user interface as the pivot table field list user interface. If the following conditions are met, there are entries in the View drop-down list.

- Starts with vw_PVT.
- Has a numeric field SeriesID.

A new view is used to support the Advanced Pivot Report. The view includes the following:

- All description fields
- MAPE

- RSqr in the view vw_PVT_VIEW_V29

For data fields, the view includes the following:

- Hist
- Original
- FValue
- UserValue01 to UserValue10

The view also includes the Error and Abs Error between Hist and other data fields.

- 8 After you select the reporting options, click **Save**.

The report is generated within Excel.

UserField1	UserField2	UserField3	01	02	03	04	05	06	07	08	09	10	11	12
EAST	DISCOUNT P	1080	Sum of HIST_DMD	116.8	116.8	116.8	116.9	116.9	116.9	227.8	230.6	233.3	233.3	236
			Sum of MDLD_DMD	244.7543381	251.0820812	254.8744447	257.0982695	253.0496151	231.9160089	332.2705622	369.1779721	389.8911194	397.8252337	405.8917325
		1352	Sum of HIST_DMD	275.8	277.4	277.4	278.1	278.7	280.2	282.9	285.3	284.1	284.8	285.1
			Sum of MDLD_DMD	420.0476795	420.9572732	422.572645	423.4336081	423.4089584	425.1315983	426.5770661	430.215646	432.0070036	431.9849134	432.6920814
		1905	Sum of HIST_DMD	200.9	223.7	223.2	205.5	191.9	228.3	228.1	234.1	199.9	227.6	221.4
			Sum of MDLD_DMD	298.2908935	339.5122235	332.1255748	323.8613007	296.369796	335.4024409	330.6385598	322.7744362	302.7913817	343.3667144	336.7565002
		1912B	Sum of HIST_DMD	274.04	280.37	300.32	316.58	295.91	301.72	333.77	356.22	335.82	320.26	351.46
			Sum of MDLD_DMD	462.3740169	458.1050167	504.1689487	534.8529229	493.6685893	491.0117743	635.6991725	677.5257363	640.8370894	641.6445671	673.0478777
		3059	Sum of HIST_DMD	77.9	105.2	105.9	120.8	105.1	180.9	170.2	167.9	209.4	223.9	228.7
			Sum of MDLD_DMD	176.3434453	208.1688959	241.4208579	241.0702937	234.7553577	260.7907617	209.975014	307.4078453	313.2258739	353.0544472	342.169474
	EVANS HARC	3056	Sum of HIST_DMD	59.19	63.86	63.06	62.13	62.52	64.02	63.75	62.43	62.07	128.34	126.45
			Sum of MDLD_DMD	123.5678564	142.4882718	134.8671062	133.1740874	127.8466041	150.5423331	141.3223969	139.4644453	134.0057483	154.8907135	208.2113613
	OUTDOOR WH	1080	Sum of HIST_DMD	139.05	109.8	139.5	158.55	127.2	117.75	160.65	179.1	185.85	159.9	338.25
			Sum of MDLD_DMD	325.7910691	273.4867185	335.5090454	371.8279745	332.592691	279.0259658	353.6774027	407.3401938	366.0611537	353.4832595	411.542567
		1905	Sum of HIST_DMD	368.85	369.3	369.15	369.6	369.6	369.6	372.75	374.95	374.95	375.75	376.2
			Sum of MDLD_DMD	558.9415405	559.8393038	560.5807383	560.0905523	561.4395449	561.712513	561.9870079	562.2631539	565.8217384	568.2813276	569.3313656
	5265A	268.2	Sum of HIST_DMD	153.6	157.6	157.6	157.6	157.6	157.6	157.6	157.6	157.6	157.6	157.6
			Sum of MDLD_DMD	429.942404	299.4992434	573.5201287	657.7380197	505.7922707	390.2282801	435.5055975	469.7663859	561.3351144	579.6982723	628.0206655
	WEST	BIG DEPOT	1080	Sum of HIST_DMD	1412	1894	2030	2394	1800	1484	1678	1710	1884	1932
			Sum of MDLD_DMD	2168.388889	2935.916322	3140.455652	3705.835594	2821.74463	2389.391608	2713.863384	2738.813381	3001.133436	3143.262079	3527.049469
		1905	Sum of HIST_DMD	1289.8	1644	2174.8	2033.8	2478	1827.2	1534.6	2565.2	2820.8	2567.8	2788.6
			Sum of MDLD_DMD	1841.241589	1623.393453	3237.961565	3119.353134	3864.676094	2834.391352	2405.880129	3942.779212	4383.038255	3875.676236	4186.715073
	EVANS HARC	2839D	Sum of HIST_DMD	96.4	119.2	127.8	146.6	111.2	83.8	92.6	100.8	122.8	129.8	138.2
			Sum of MDLD_DMD	137.9676044	179.4350707	198.5443313	229.0051926	177.4095853	134.7386429	149.8222748	167.2873847	194.0192754	195.2727003	211.2229405
		3059	Sum of HIST_DMD	64.6	87.3	93.1	110.8	81.8	67	76.2	77.7	84.1	87.1	95.4
			Sum of MDLD_DMD	99.63001153	135.7918309	145.6336564	173.6809205	129.9368355	108.2112247	123.8475047	125.3984657	134.7405445	143.3998004	160.2049604
	GARDEN SQ	1352	Sum of HIST_DMD	214	221	221.6	206	186	198	197.6	213	194.2	219.6	218.9
			Sum of MDLD_DMD	321.1959213	333.8476025	335.9295373	314.4322049	281.7124142	303.0593936	304.0742951	322.02031	293.1790545	333.0263535	331.2478016

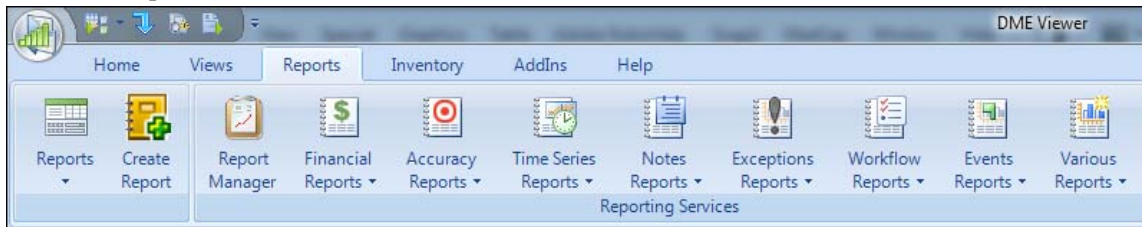
Benefits of Pivot Reports

The benefits of this Pivot Reports include the following:

- Built-in pivot table and other reports.
- Reduces the time required to create a Pivot Report. The Wizard only loads the data necessary for the report.

Reporting Services

The **Reporting Services** section of the **Reports** ribbon allows users to quickly run custom reports on the currently displayed data. The **Reporting Services** section contains a series of different report categories, each with a list of default reports that can be run by selecting the report name from the drop-down list.



Reporting Services will contain eight categories of pre-loaded reports that can be run:

Table 11.1 Standard Reports

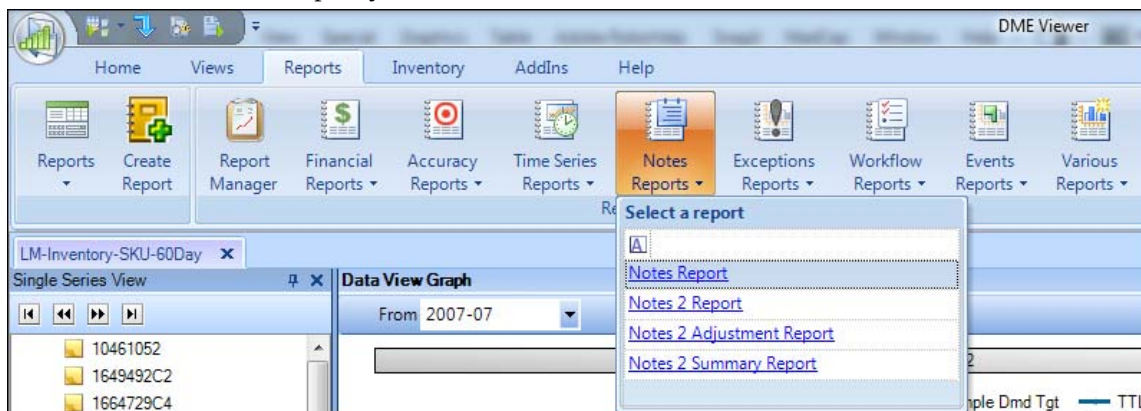
Category	Basic Reports	Description
Financial Reports	Budget Variance Rows	These reports show the budget in dollars vs. the revenue based on actual sales and forecast. The variance is calculated in dollars and percent to help target the largest gaps and drill-down to the details.
	Budget Variance Columns	
	Budget Variance Graph	
Accuracy Reports	Lag 1 Report	These reports are used to track forecast accuracy. There is a standard set of calculations for accuracy including MAPE, Error, Bias, etc. and an important component of these reports is the lag periods. Lags are defined as the number of periods in advance the user wants to “freeze” or store the forecast opinion lines. There are several report formats with different user interactions required, for example, drill down, select starting and ending periods, customer groups or product families. The Lag Reports require a custom table in the database where forecast data will be stored with labels for lag periods and date the forecast was saved.
	Lag 3 Report	
	Lag Waterfall Report	
Time-Series Reports	History vs. Forecast	This report has a similar look and feel as the Summary View in DME. The user should have the ability to select the series to show as well as the opinion lines and date range. There is drill down capability for three series attributes that can be configured.
Notes Reports	Notes	The Notes reports show all the notes entered in DME or PP at either the series or observation level. It also shows any adjustments made to the data including the old and new values by observation. The notes can be filtered by a series attribute, period, or reason code.
	Notes Adjustment	
	Notes Summary	
Exceptions Reports	Exceptions	This report will display any data that has the “No Sales in the last 6 months” exception.

Table 11.1 Standard Reports

Category	Basic Reports	Description
Workflow Reports	Workflow	Report that shows all the detail from the Planning Portal Workflow including Process, Task, Deadline, and Status. Options can be added to group by User or Process or select cycles or date range.
Events Reports	Events	Reports containing data for any records that are currently associated with specific events.
Various Reports	Pacing	The Inventory reports summarize inventory positions over time in dollars or units with beginning and ending inventory, periods of supply, safety stock, and forecast.
	Inventory Dollars	
	Inventory Monthly	
	Inventory DRP	

Running a Report

To run a report, click on the report category to expand the **Select a Report** drop-down list and then click on the name of the report you want to run.



The report is generated automatically for the current scenario and displays in the **Report Viewer** window.

The screenshot shows the 'Report Viewer - Events Report - LM-Sales' window. The window has a header section with filters for Year (2007, 2008, 2009, 2010), Group (CONSUMER, OEM, PROFESS), Origin (Hist, Fcst), and Customer Name (K-MART, TARGET, WALMART). Below the filters is a table titled 'Events Report' with columns: Event Name, Category, Lft Type, Class, Family, Item Description, Opinion, Hist Total, Fcst Total, and Total. The table contains two rows of data: one for 'Price Increase' and one for 'Promo'. Each row has two sub-rows for 'Promo Volume' and 'Event Volume'.

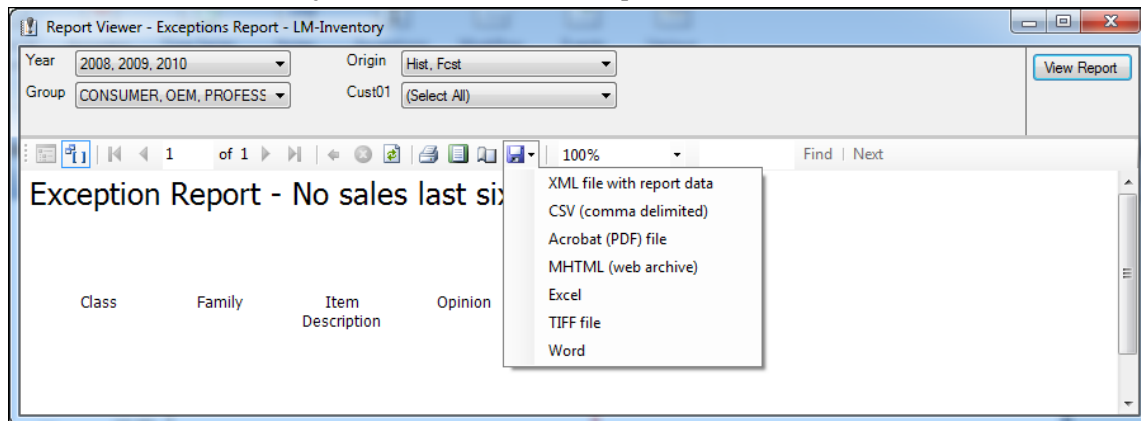
Event Name	Category	Lft Type	Class	Family	Item Description	Opinion	Hist Total	Fcst Total	Total
Price Increase	Price Increase	Amount	GARDEN	SPADE	MCKOY SPADE	Promo Volume	\$ 328,441.44	\$ 251,733.99	\$ 580,175.43
						Event Volume	-	-	-
Promo	BOGO	Statistical	GARDEN	POT	MEGA POT	Promo Volume	\$ 543,126.51	\$ 1,036,591.06	\$ 1,579,717.57
						Event Volume	-	-	-

Many of the reports will contain filter criteria drop-downs at the top of the **Report Viewer** window that allow you to filter the report data on the fly. These fields allow you to select specific criteria to include in the report and click the **View Report** button to refresh the report.

For example, in the screenshot above, users can use the **Year** drop-down to select specific years from which to view events. The Customer Name drop-down allows you to only view events from a specific customer. Users can make selections from multiple filter drop-downs to further narrow the focus of the report.

Note Not all reports will contain filter criteria and the available criteria will be different for each report type.

Once a report has been generated, the report can be printed or exported. Click the **Export** icon to select the format in which you want the data to be exported.



Sample Reports

The following sections provide examples of what the standard reports will look like once they have been generated.

Notes Report

Report Viewer - Notes Report - LM-Sales

1 of 5 100% Find | Next

Notes Report

Series	Scenario	Hierarchy	DT	Opinion Line	Note	Reason Code	User ID	Create DT
[A-4 MAT]	LM-Sales	Hierarchy Level			Test Note 1	Inventory	fradmin	2/2/2010 11:41:23 PM
[A-4 MAT]	LM-Sales	Hierarchy Level			Test Note 2	Inventory	fradmin	2/2/2010 11:41:52 PM
[HAND HELPER 101]	LM-Sales	Hierarchy Level			Made change for Hand Helper - Increase Fcst to 100,000 units	Inventory	fradmin	2/3/2010 11:04:30 AM
[LOGAN SPADE]	LM-Sales	Hierarchy Level			Increased Forecast	Inventory	fradmin	2/3/2010 12:48:30 PM
[LOGAN SPADE]	LM-Sales	Hierarchy Level			Put in note for fcst	Inventory	fradmin	2/3/2010 1:06:29 PM
[MCKDY SPADE]	LM-Sales	Hierarchy Level	2009-09	Stat Fcst Main	Forecast Update	Inventory	fradmin	2/3/2010 1:39:30 PM
K-MART OR36068 PURDUE MAT	LM-Sales	Detail Level			Note	New Business	fradmin	12/3/2010 9:36:27 AM
K-MART GEH5064 MIT-OMATIC LX	LM-Sales	Detail Level			Note	New Business	fradmin	12/3/2010 9:36:43 AM
K-MART GEH5064 MIT-OMATIC LX	LM-Sales	Detail Level			Note	New Business	fradmin	12/3/2010 1:59:34 PM
Z-All Other 1888312C1 SUPER ROCK 101	LM-Sales	Detail Level	2009-07	02-Event Vol	Big Promo	Promotion	fradmin	12/3/2010 2:07:66 PM
TARGET 1888312C1 SUPER ROCK 101	LM-Sales	Detail Level	2009-03	Adj Hist	Big Promo. Reduced Forecast	Other	fradmin	12/8/2010 2:33:32 PM
TARGET 1818420C2 MEGA POT	LM-Sales	Detail Level	2009-05	UserEventValue	Event Note: Promo Category: BOGO. Applied by fradmin on 12/8/2010	Event	fradmin	12/8/2010 3:02:38 PM
K-MART GE9007 CANANDA SPADE	LM-Sales	Detail Level	2009-07	01-Judgement	Adjustment	Adjustment	fradmin	12/27/2010 10:50:24 AM
K-MART GE9007 CANANDA SPADE	LM-Sales	Detail Level	2009-08	02-Event Vol	Adjustment	Adjustment	fradmin	12/27/2010 10:50:26 AM
K-MART GE9007 CANANDA SPADE	LM-Sales	Detail Level	2009-09	01-Judgement	Adjustment	Adjustment	fradmin	12/27/2010 10:50:26 AM
K-MART GE9007 CANANDA SPADE	LM-Sales	Detail Level	2009-09	02-Event Vol	Adjustment	Adjustment	fradmin	12/27/2010 10:50:26 AM

Notes Report 2

Report Viewer - Notes 2 Report - LM-Sales

Group: CONSUMER, OEM, PROFESS Period: (Series Note), 2008-07, 2008-0

Reason Codes: Adjustment, Default, Event, Inv

View Report

Notes Report 2

Series	Opinion Line	Period	User ID	Creation Date	Notes	Old Value	New Value
	05-Final Fcst	2009-10	fxadmin	2/15/2011 3:43:56 PM	Adjustment	\$ 444,453.41	\$ 500,000.00
		2009-11	fxadmin	2/15/2011 3:44:22 PM	Adjustment	\$ 290,000.00	\$ 500,000.00
.10461052	End Inv 30Day - 5 Day Shipment	2009-08	fxadmin	1/3/2011 1:33:27 PM	Adjustment	\$ 136,500.00	-
K-MART	04-Override	2009-12	fxadmin	2/15/2011 3:49:24 PM	Adjustment	-	\$ 25,000.00
		2010-01	fxadmin	2/15/2011 3:50:54 PM	Adjustment	-	\$ 19,000.00
	05-Final Fcst	2009-08	fxadmin	2/15/2011 3:48:41 PM	Adjustment	\$ 31,349.99	\$ 50,000.00
	Sales Plan	2009-07	fxadmin	2/7/2011 12:15:31 PM	Adjustment	\$ 4,718.00	\$ 35,000.00
			fxadmin	2/7/2011 12:19:57 PM	Adjustment	\$ 4,718.00	\$ 35,000.00
		2009-08	fxadmin	2/7/2011 12:15:37 PM	Adjustment	\$ 5,072.00	\$ 35,000.00
			fxadmin	2/7/2011 12:20:05 PM	Adjustment	\$ 5,072.00	\$ 35,000.00
		2009-09	fxadmin	2/7/2011 12:20:18 PM	Adjustment	\$ 5,324.00	\$ 35,000.00
		2009-10	sales	1/13/2011 2:59:55 PM	20 new stores		
		2010-01	fxadmin	2/24/2011 2:31:12 PM	Adjustment	\$ 500.00	\$ 15,000.00
		2010-02	fxadmin	2/24/2011 2:31:20 PM	Adjustment	\$ 600.00	\$ 16,000.00
		2010-03	fxadmin	2/24/2011 2:31:24 PM	Adjustment	\$ 700.00	\$ 17,000.00
		2010-04	fxadmin	2/24/2011 2:31:26 PM	Adjustment	\$ 800.00	\$ 18,000.00
		2010-05	fxadmin	2/24/2011 2:31:27 PM	Adjustment	\$ 900.00	\$ 19,000.00
		2010-06	fxadmin	2/24/2011 2:31:29 PM	Adjustment	\$ 1,000.00	\$ 20,000.00

Notes Report 2 Adjustments

Report Viewer - Notes 2 Adjustment Report - LM-Sales

Group: CONSUMER, OEM, PROFESS Period: (Series Note), 2008-07, 2008-0

Reason Codes: Adjustment, Default, Event, Inv

View Report

Notes Report 2 Adjustments

Series	Reason Code	Opinion Line	Period	User ID	Creation Date	Notes	Old Value	New Value
	Adjustment	05-Final Fcst	2009-10	fxadmin	2/15/2011 3:43:56 PM	Adjustment	444,453.41	500,000.00
			2009-11	fxadmin	2/15/2011 3:44:22 PM	Adjustment	290,000.00	500,000.00
.10461052	Adjustment	End Inv 30Day - 5 Day Shipment	2009-08	fxadmin	1/3/2011 1:33:27 PM	Adjustment	136,500.00	-
K-MART	Adjustment	04-Override	2009-12	fxadmin	2/15/2011 3:49:24 PM	Adjustment	-	25,000.00
			2010-01	fxadmin	2/15/2011 3:50:54 PM	Adjustment	-	19,000.00
		05-Final Fcst	2009-08	fxadmin	2/15/2011 3:48:41 PM	Adjustment	31,349.99	50,000.00
		Sales Plan	2009-07	fxadmin	2/7/2011 12:15:31 PM	Adjustment	4,718.00	35,000.00
				fxadmin	2/7/2011 12:19:57 PM	Adjustment	4,718.00	35,000.00
			2009-08	fxadmin	2/7/2011 12:15:37 PM	Adjustment	5,072.00	35,000.00
				fxadmin	2/7/2011 12:20:05 PM	Adjustment	5,072.00	35,000.00
			2009-09	fxadmin	2/7/2011 12:20:18 PM	Adjustment	5,324.00	35,000.00
			2010-01	fxadmin	2/24/2011 2:31:12 PM	Adjustment	500.00	15,000.00
			2010-02	fxadmin	2/24/2011 2:31:20 PM	Adjustment	600.00	16,000.00
			2010-03	fxadmin	2/24/2011 2:31:24 PM	Adjustment	700.00	17,000.00
			2010-04	fxadmin	2/24/2011 2:31:26 PM	Adjustment	800.00	18,000.00
			2010-05	fxadmin	2/24/2011 2:31:27 PM	Adjustment	900.00	19,000.00
			2010-06	fxadmin	2/24/2011 2:31:29 PM	Adjustment	1,000.00	20,000.00
				sales	1/13/2011 2:59:55 PM	20 new stores		

Notes Report 2 Summary

Report Viewer - Notes 2 Summary Report - LM-Sales

Group: CONSUMER, OEM, PROFESS Period: (Series Note), 2008-07, 2008-0 View Report

Reason Codes: Adjustment, Default, Event, Inv

1 of 5 100% Find | Next

Notes Report 2 Summary

Scenario	Series	Hierarchy	Opinion Line	Period	Reason Code	User ID	Create DT	Last DT Update	Note
LM-Sales	K-MART, EC40PBA, DANIEL MAT	LM-Sales - CustomerIABC	Sales Plan	2010-01	Adjustment	fradmin	2/24/2011 2:09:58 PM	2/24/2011 2:09:58 PM	Adjustment
LM-Sales	K-MART, EC40PBA, DANIEL MAT	LM-Sales - CustomerIABC	Sales Plan	2010-02	Adjustment	fradmin	2/24/2011 2:09:59 PM	2/24/2011 2:09:59 PM	Adjustment
LM-Sales	K-MART, EC40PBA, DANIEL MAT	LM-Sales - CustomerIABC	Sales Plan	2010-03	Adjustment	fradmin	2/24/2011 2:09:59 PM	2/24/2011 2:09:59 PM	Adjustment
LM-Sales	K-MART, EC40PBA, DANIEL MAT	LM-Sales - CustomerIABC	Sales Plan	2010-04	Adjustment	fradmin	2/24/2011 2:24:43 PM	2/24/2011 2:24:43 PM	Adjustment
LM-Sales	K-MART, EC40PBA, DANIEL MAT	LM-Sales - CustomerIABC	Sales Plan	2010-05	Adjustment	fradmin	2/24/2011 2:24:44 PM	2/24/2011 2:24:44 PM	Adjustment
LM-Sales	K-MART, EC40PBA, DANIEL MAT	LM-Sales - CustomerIABC	Sales Plan	2010-06	Adjustment	fradmin	2/24/2011 2:24:48 PM	2/24/2011 2:24:48 PM	Adjustment
LM-Sales	K-MART, EC40PBA, DANIEL MAT	LM-Sales - CustomerIABC	Sales Plan	2010-01	Adjustment	fradmin	2/24/2011 2:40:21 PM	2/24/2011 2:40:21 PM	Adjustment
LM-Sales	K-MART, EC40PBA, DANIEL MAT	LM-Sales - CustomerIABC	Sales Plan	2010-02	Adjustment	fradmin	2/24/2011 2:40:23 PM	2/24/2011 2:40:23 PM	Adjustment
LM-Sales	K-MART, EC40PBA, DANIEL MAT	LM-Sales - CustomerIABC	Sales Plan	2010-03	Adjustment	fradmin	2/24/2011 2:40:25 PM	2/24/2011 2:40:25 PM	Adjustment
LM-Sales	K-MART, EC40PBA, DANIEL MAT	LM-Sales - CustomerIABC	Sales Plan	2010-04	Adjustment	fradmin	2/24/2011 2:40:27 PM	2/24/2011 2:40:27 PM	Adjustment
LM-Sales	K-MART, EC40PBA, DANIEL MAT	LM-Sales - CustomerIABC	Sales Plan	2010-12	Adjustment	fradmin	3/2/2011 5:49:14 PM	3/2/2011 5:49:14 PM	Adjustment

Exception Report

Report Viewer - Exceptions Report - LM-Sales

Year: 2009 Origin: Hist View Report

Group: CONSUMER, OEM, PROFESS Customer Name: K-MART, TARGET, WALMART

1 of 1 100% Find | Next

Exception Report - No sales last six months

Class	Family	Item Description	Opinion	Hist	Total
GARDEN	SPADE	DIRT WEASEL 102	Stat Fcst Main	-	-
		DIRT WEASEL LX	Stat Fcst Main	2	2
LAWN	GATE	STRATHMERE GATE	Stat Fcst Main	1	1

Workflow Report

Report Viewer - Workflow Report - LM-Sales

1 of 1 Find | Next

Workflow

User Name	Process Name	Task Name	Cycle	Deadline	Status	Date Change Status
fxadmin	S&OP	Update Marketing Plan	2011-03	3/3/2011 12:00:00 AM	initialized	
fxadmin	S&OP	Check Assumptions	2011-03	3/4/2011 12:00:00 AM	initialized	
fxadmin	S&OP	Build Demand Plan	2011-03	3/11/2011 12:00:00 AM	initialized	
fxadmin	S&OP	Conduct Pre-S&OP	2011-03	3/11/2011 12:00:00 AM	initialized	
fxadmin	S&OP	Revise Assumptions and Plans	2011-03	3/16/2011 12:00:00 AM	initialized	
fxadmin	S&OP	Build Supply Plan	2011-03	3/18/2011 12:00:00 AM	initialized	
fxadmin	S&OP	S&OP Meeting	2011-03	3/18/2011 12:00:00 AM	initialized	

Events Report

Report Viewer - Events Report - LM-Sales

Year: 2007, 2008, 2009, 2010 Origin: Hist, Fcst
Group: CONSUMER, OEM, PROFESS Customer Name: K-MART, TARGET, WALMART View Report

1 of 1 Find | Next

Events Report

Event Name	Category	Lit Type	Class	Family	Item Description	Opinion	Hist Total	Fcst Total	Total
Price Increase	Price Increase	Amount	GARDEN	SPADE	MCKOY SPADE	Promo Volume	\$ 328,441.44	\$ 251,733.99	\$ 580,175.43
						Event Volume	-	-	-
Promo	BOGO	Statistical	GARDEN	POT	MEGA POT	Promo Volume	\$ 543,126.51	\$ 1,036,591.06	\$ 1,579,717.57
						Event Volume	-	-	-

Inventory Dollars Report

Report Viewer - Inventory Dollars Report - LM-Sales

Year: 2007, 2008, 2009, 2010 Origin: Hist, Fcst View Report

Group: CONSUMER, OEM, PROFESS Customer Name: K-MART, TARGET, WALMART

1 of 1 100% Find Next

Inventory Dollars

Class	Family	Item Description	Opinion	Hist Total	Fcst Total	Total
GARDEN	GLOVE	HAND HELPER 101	Ave Cost	\$ 43	\$ 32	\$ 76
			TTL Revenue	\$ 2,391,128	\$ 406,568	\$ 2,797,696
			TTL Cost	\$ 1,195,564	\$ 203,284	\$ 1,398,848
		HAND HELPER 103	Ave Cost	\$ 1,061	\$ 796	\$ 1,857
			TTL Revenue	\$ 1,262,819	\$ 2,055,239	\$ 3,318,058
			TTL Cost	\$ 620,672	\$ 1,010,144	\$ 1,630,816
		MIT-OMATIC 101	Ave Cost	\$ 10,197	\$ 7,647	\$ 17,844
			TTL Revenue	\$ 8,692,820	\$ 1,589,232	\$ 10,282,053
			TTL Cost	\$ 8,207,729	\$ 1,500,547	\$ 9,708,276
		MIT-OMATIC 102	Ave Cost	\$ 1,927	\$ 1,446	\$ 3,373
			TTL Revenue	\$ 4,012,697	\$ 2,794,117	\$ 6,806,814
			TTL Cost	\$ 2,148,828	\$ 1,496,270	\$ 3,645,097
		MIT-OMATIC LX	Ave Cost	\$ 220	\$ 259	\$ 479
			TTL Revenue	\$ 192,900	\$ 235,158	\$ 428,058
			TTL Cost	\$ 145,970	\$ 177,947	\$ 323,918
	POT		Ave Cost	\$ 2,693	\$ 2,046	\$ 4,739

Inventory Monthly Report

Report Viewer - Inventory Monthly Report - LM-Sales

Year: 2007, 2008, 2009, 2010 Origin: Hist, Fcst View Report

Group: CONSUMER, OEM, PROFESS Customer Name: K-MART, TARGET, WALMART

1 of 1 100% Find Next

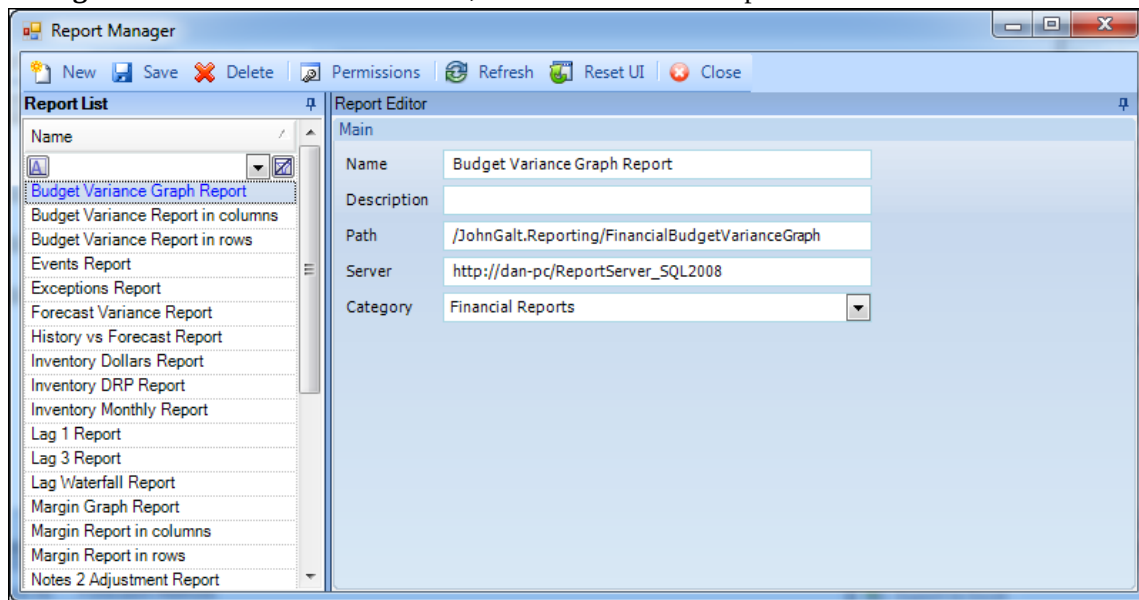
Inventory Monthly

Class	Family	Item Description	Opinion	Hist Total	Fcst Total	Total
GARDEN			OnHand	-	-	-
			04-Override	-	469,442	469,442
			Act Hist	5,712,937	-	5,712,937
			End Inv 60Day - 5 Day Shipment		6,348,805	6,348,805
			End Inv 30Day		3,159,661	3,159,661
			Future Orders	-	54,195	54,195
			High End Fcst	6,281,224	3,886,012	10,167,235
			Stat Fcst 2	-	-	-
			SSOnHand	-	25,874,199	25,874,199
			ErlangC			
HOME			OnHand	-	-	-
			04-Override	-	352,883	352,883
			Act Hist	3,254,877	-	3,254,877
			End Inv 60Day - 5 Day Shipment		1,911,926	1,911,926
			End Inv 30Day		1,130,320	1,130,320
			Future Orders	-	57,343	57,343
			High End Fcst	3,580,365	1,400,615	4,980,980
			Stat Fcst 2	56,032	39,763	95,795
			SSOnHand	-	25,068,503	25,068,503
			ErlangC			

Report Manager

The **Report Manager** button allows users to create custom reports by selecting the source of the report data and then assigning them to a report category. Click this button to view the **Report**

Manager screen which is used to create, maintain and delete reports.



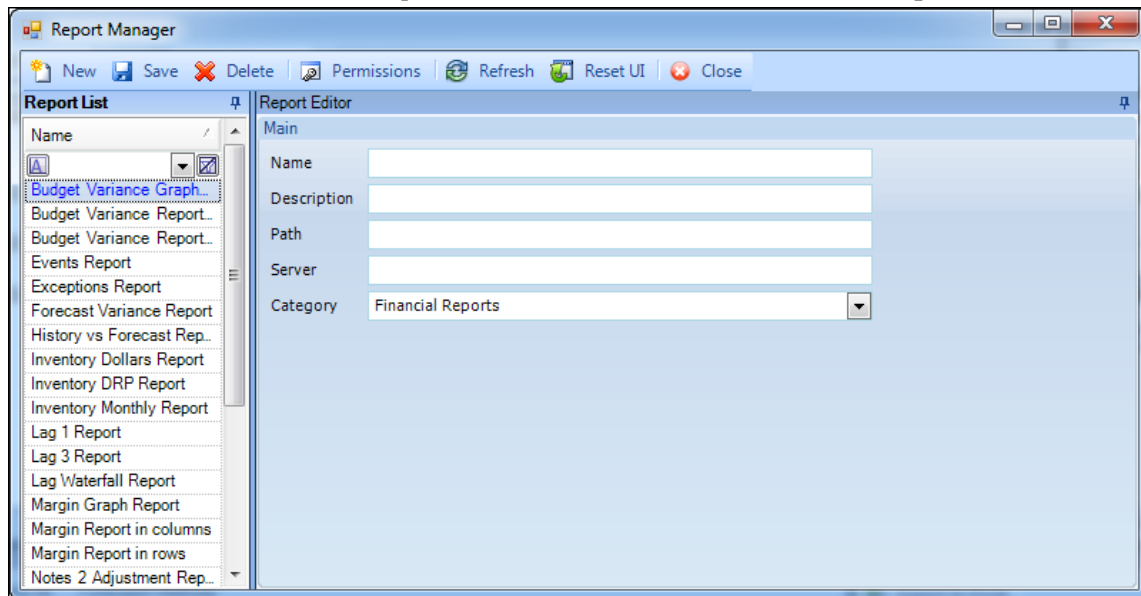
From this screen, users can also assign these custom reports to individual users IDs using the **Permissions** functionality.

To edit an existing report, select it from the **Report List** and make any necessary changes to the values in the **Report Editor** section. Click **Save** when finished to save your changes.

To delete a report, select it from the **Report List** and click the **Delete** button. You will be asked to confirm the deletion. Click “Yes” and the report will be removed from the **Report List** and will no longer display in the report category drop-down.

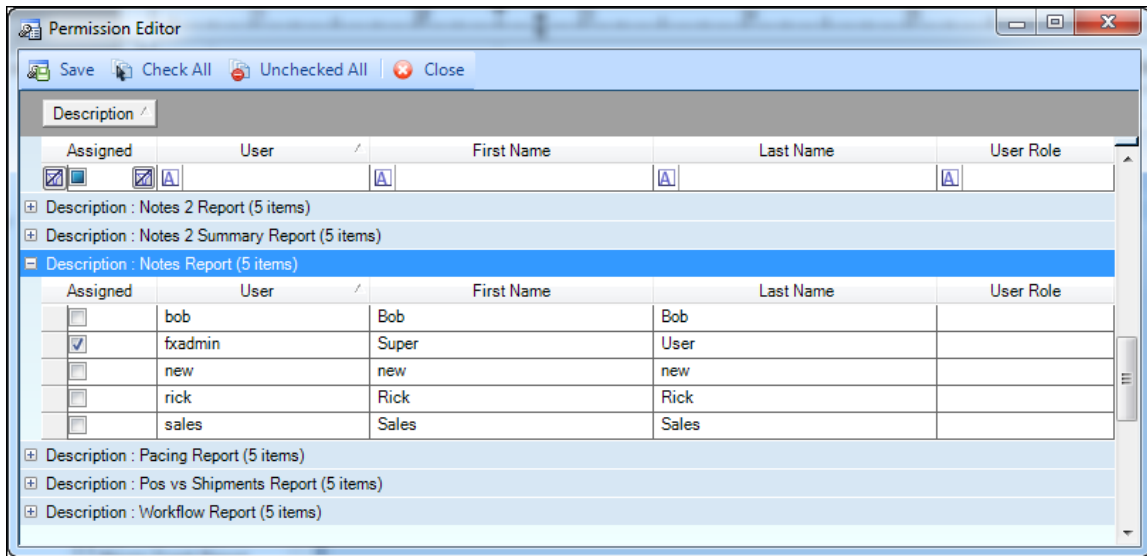
Creating a New Report

- 1 Click the **New** button at the top of the window to clear the fields in the **Report Editor** section.



- 2 Enter the **Name** of this report. This name will display in the **Report List** on the Report Manager screen and in the drop-down of the selected category when running the report.
Note Since the Name assigned to this report will also serve as the drop-down selection used to run the report, it is important to choose a name that is both descriptive and intuitive.
- 3 Enter a **Description** of this report if it requires further notation.
- 4 In the **Path** field, enter the file path to where this report will be stored on your local drive. The default reports are stored in the “/JohnGalt.Reporting/ReportName” location.
- 5 Enter the name and location of the **Server** used to run reports. The default server location should be “http://YOUR-COMPUTER-NAME/ReportServer_SQL2008”.
- 6 Use the **Category** drop-down to select the report category where you want this report to be run from on the Reports ribbon (i.e., “Financial Reports”, “Notes Reports”, etc.).
- 7 Click the **Save** button to create the new report.

- 8 Click the **Permissions** button to assign the report to specific user IDs using the **Permissions Editor** window.

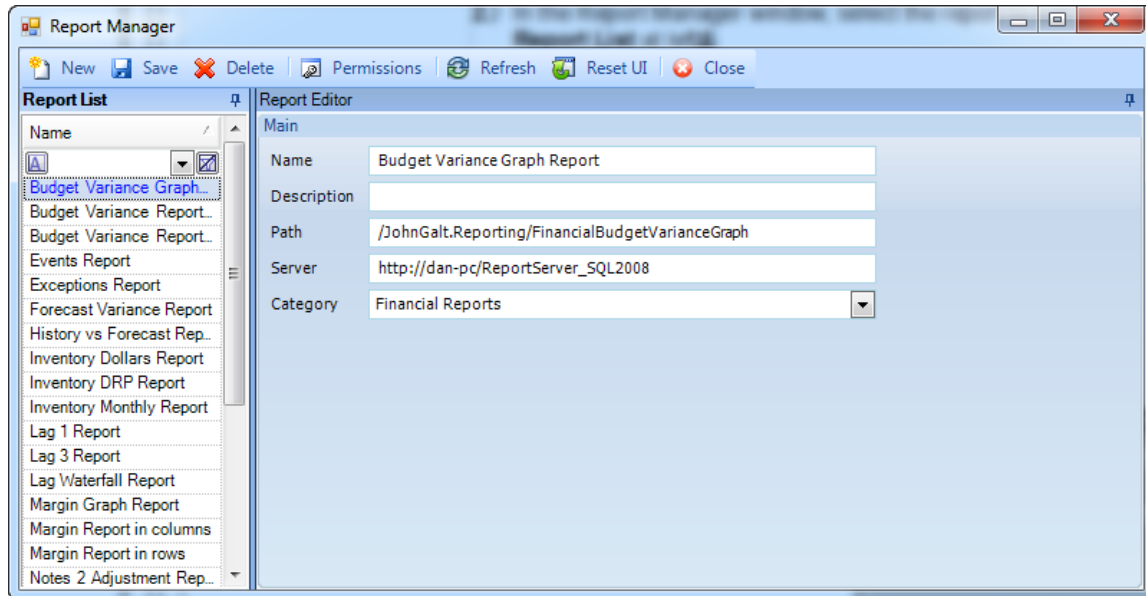


- 9 Use the check boxes in the **Assigned** column to indicate which users will have access to this report.
- 10 Click **Save** when finished to save the permissions.
- 11 Click **Close** to exit the Permission Editor window.

Edit an Existing Report

The Report Manager can also be used to make updates to existing reports, such as changing the category where the report is located.

- 1 Click the **Report Manager** icon on the Reports ribbon.
- 2 In the Report Manager window, select the report to edit from the **Report List** at left.



- 3 Make any necessary updates to the name, description or file location for the report.
- 4 Select a new **Category** to change where the report is selected from on the Reporting Services section of the Reports ribbon.
- 5 Click **Save** to make the updates.
- 6 Click **Close** to exit and return to the Viewer.

Chapter 12

Retagging

Overview 208

Assign Retagging 208

Overview

The Retagging feature in the DME automates the process in which one Series is copied or moved to another Series. Retagging is beneficial when a product is at EOL and the company is introducing a new product to replace it. Or even introducing a product similar to one that already exists. Retagging can also be used to merge products together, split them apart, or combine customers.

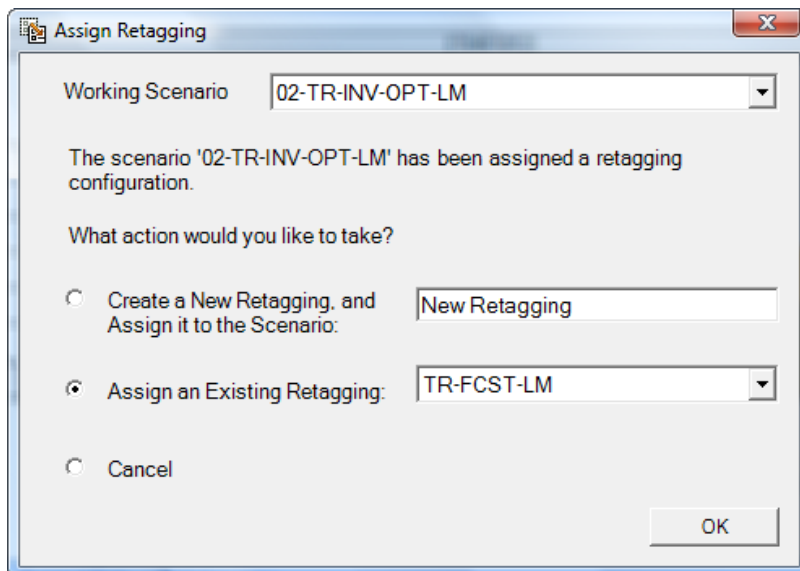
Retagging works by copying part or all of an Opinion Line from one Series to another, which enables the user to base the Forecast on History from another item. Retagging copies the data from the source to the target for dates within the specified range. It then multiplies the source data by the remain percentage.

Each Retag contains:

- Source Series
- Target Series
- Start Date
- End Date
- Remain Percentage

Assign Retagging

- 1 On the **AddIns** ribbon, click the **Retagging** button.
The **Assign Retagging** window displays.

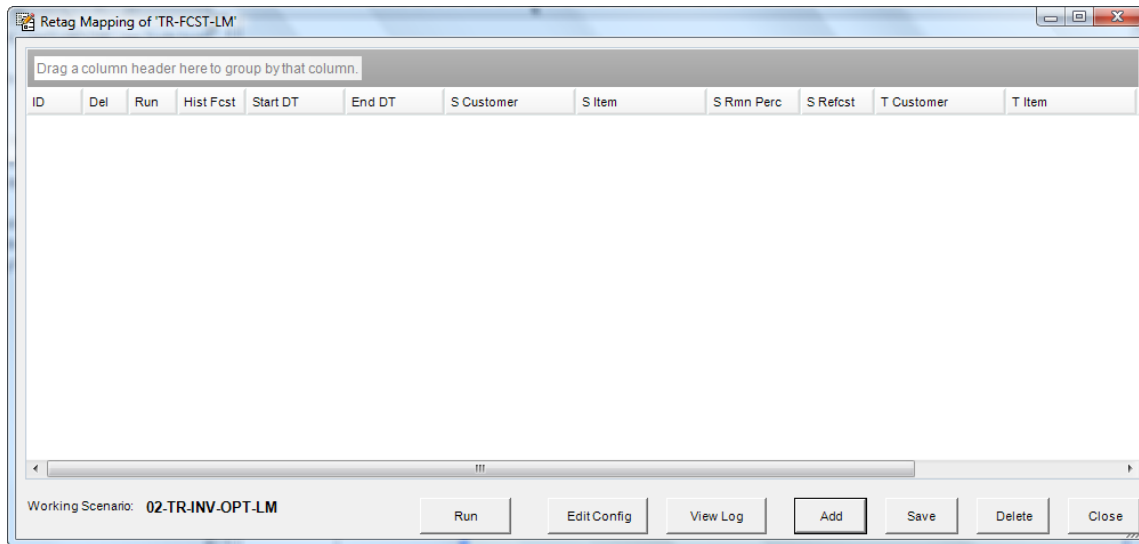


- 2 Select whether to create a new retagging or assign an existing retagging to the Scenario. Select **Cancel** to close the window.

Create a New Retagging

- 1 Select “Create a New Retagging, and Assign it to the Scenario” and enter a name for the new retagging in the field to the right.
- 2 Click **OK**.

The **Retag Mapping** window displays.



The table below details each available column in this window:

Table 12.1

Column	Description
ID	System generated ID used to identify each mapping contained in a Retag configuration.
Del	Select to delete a mapping created for a Retag configuration. Click the Delete button to delete all mappings with this check box selected.
Run	Select this check box to run a mapping. Any mappings with this check box enabled will be executed when the Run button is clicked.
	Note: Prior to running a retag, you must enable the Run checkbox for any mapping you would like to execute.
Hist Fcst	Determines which time periods in a Scenario will be affected by the mapping. There are three available options: • History - Mapping only affects Historical periods in the Scenario. • Future - Mapping only affects Forecast periods in the Scenario. • Both - Mapping affects both Historical and Forecast periods in the Scenario.

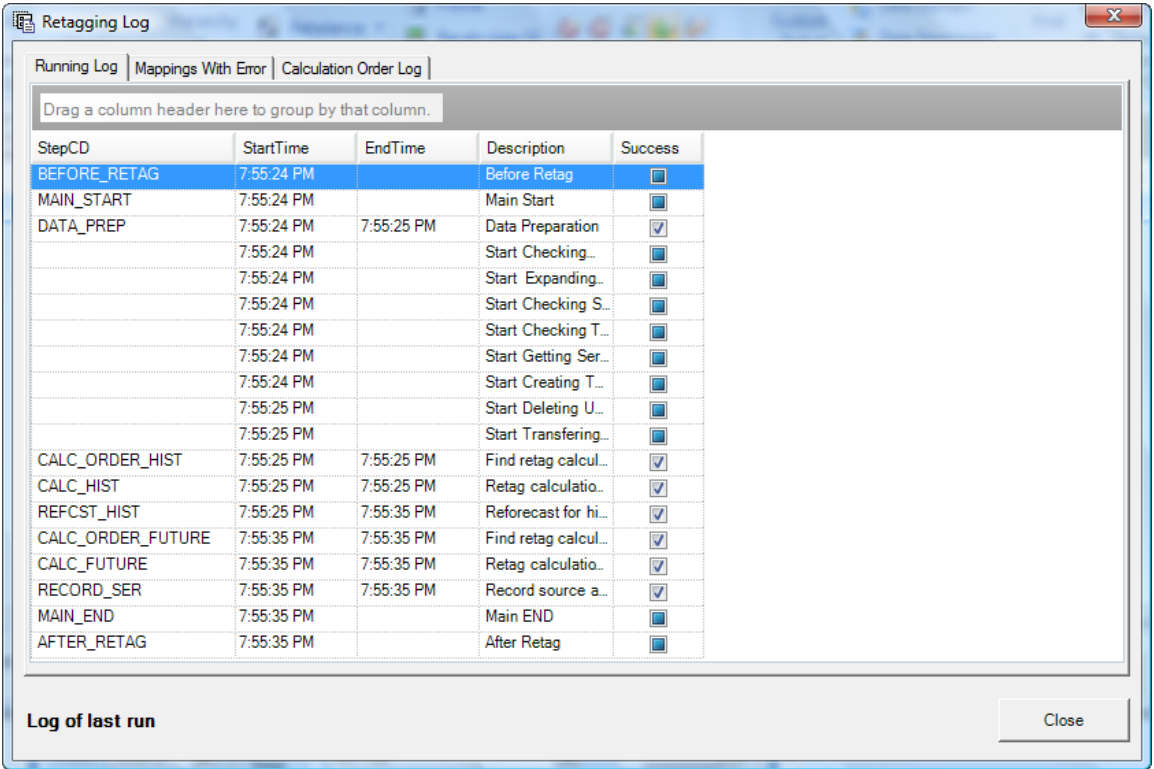
Table 12.1

Column	Description
Start DT	The beginning of the date range for data that will be affected by this mapping. Data from any period before this date will not be affected by this mapping. Note: If a period after this date was not affected by a mapping, check if the period is included in the “His Fcst” option.
End DT	The end of the date range for data that will be affected by this mapping. Data from any period after this date will not be affected by this mapping. Note: If a period before this date was not affected by a mapping, check if the period is included in the “His Fcst” option.
S Customer	Retrieves observations and inserts them in the Target Series. This is the only source field configured by default. Note: The amount of source fields can be configured for each retag. Contact your System Administrator for more information.
S Item	Indicates the source mapping fields. Multiple series can be retagged with one mapping and any two series can be matched.
S Rmn Perc	Specifies what percentage of the original value to leave in the source.
S Refcst	Indicates whether the Source Series should be reforecasted after the mapping has run.
T Customer	Retrieves observations and inserts them in the Target Series. This is the only source field configured by default. Note: The amount of source fields can be configured for each retag. Contact your System Administrator for more information.
T Item	Indicates the Target mapping fields. Multiple series can be retagged with one mapping and any two series can be matched.
T Alloc Perc	Specifies what percentage of the Source Series should be allocated to the Target Series.
T Refcst	Indicates whether the Target Series should be reforecasted after the mapping has run.
T Reset	Specifies whether the system should reset any existing observations in the Target Series before saving information from the Source Series. If unchecked, then the existing values in the Target Series are added to the ones from the Source Series.

- 3 Select the “Run” check box for the mapping and then click the **Run** button at the bottom of the screen.

The Retag Mapping is run and any reforecasting will be performed.

4 Click the **View Log** button to open the **Retagging Log** window.



The following table details what each tab in the Retagging Log window means.

Table 12.2

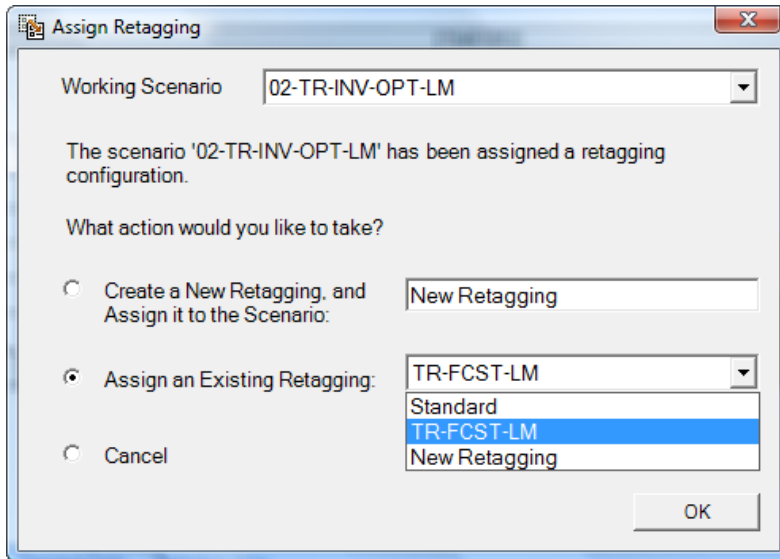
Tab	Description
Running Log	Displays a description of the action that is performed during the Retag.
Mappings With Error	Displays any mappings that failed in the execution.
Calculation Order Log	Displays which series was retagged to which series.

5 Click the **Close** button when finished.

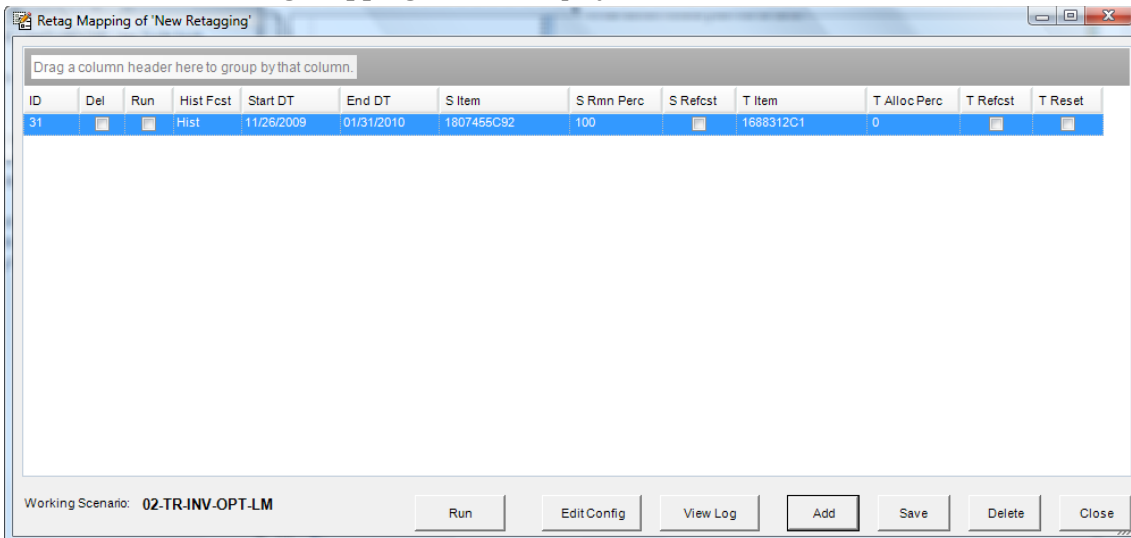
6 On the Retag Mapping screen, click the **Save** button to save your changes.

Assign an Existing Retagging

- 1 Select “Assign an Existing Retagging” and choose a retagging from the drop-down list to the right.



- 2 Click **OK**. The **Retag Mapping** window displays.



Note You can click on the column headings to arrange the retags in ascending or descending order.

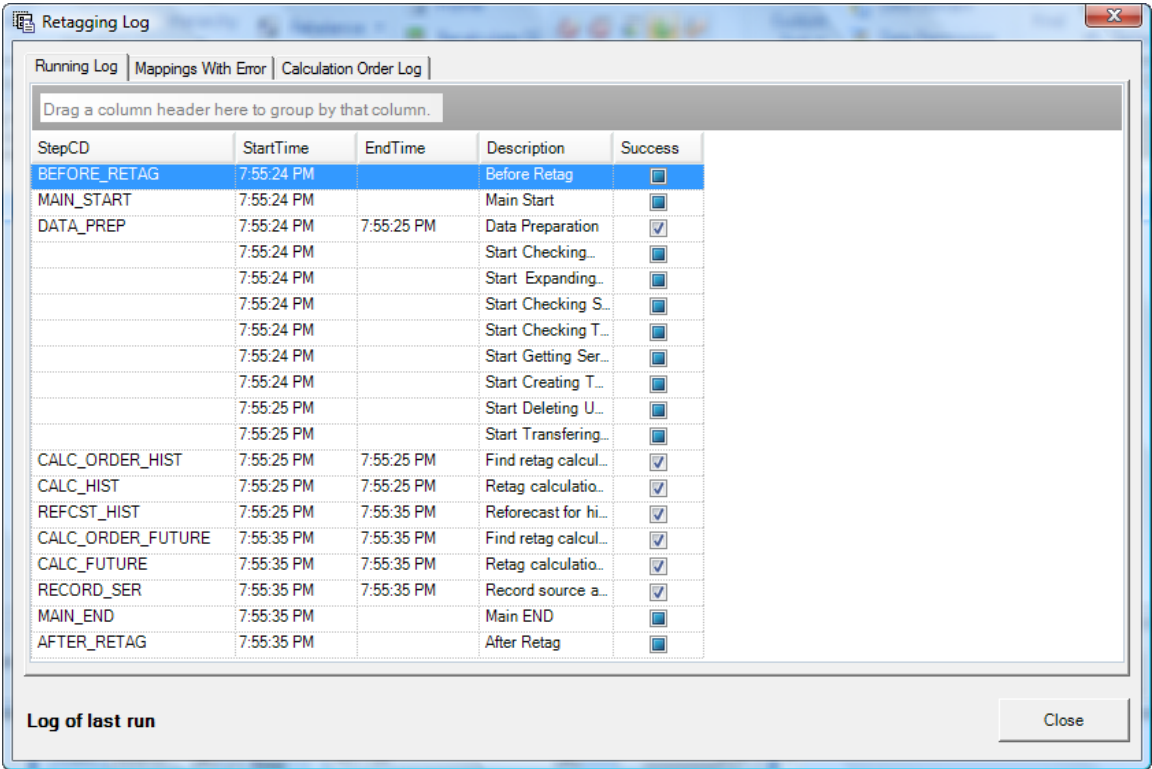
Note You can drag a heading to the grey area to display only that column. You can also add more columns to group the columns in hierarchal order.

See the table in Section [Create a New Retagging](#) for additional information on each of the fields in the Retag Mapping window.

- 3 Select the “Run” check box for the mapping and then click the **Run** button at the bottom of the screen.

The Retag Mapping is run and any reforecasting will be performed.

4 Click the **View Log** button to open the **Retagging Log** window.



The following table describes each tab in the Retagging Log window.

Table 12.3

Tab	Description
Running Log	Displays description of what is performed during the Retag.
Mappings With Error	Displays any mappings that failed in the execution.
Calculation Order Log	Displays which Series was retagged to which series.

- 5 Click the **Close** button when finished.
- 6 On the Retag Mapping screen, click the **Save** button to save your changes.

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