

# ***Planning Portal Super User Guide***

**Planning Portal 4.0**  
**Rev 1**

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# Table of Contents

## Table of Contents 3

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<b>Chapter 1 Introduction</b>	<b>7</b>
Overview	7
Planning Portal Highlights	8
Logging In	8
Logging Out	9
Documentation Conventions	9
Text	9
Screen Captures	10
Acronyms and Abbreviations	10
Software License; Intellectual Property	10
Preamble	10
License Grant	11
Restrictions	11
Ownership of Media	11
<hr/>	
<b>Chapter 2 Installation</b>	<b>14</b>
Overview	14
Requirements	14
Hardware	15
Software Media	16
Prerequisites	17
Microsoft .NET Framework 2.0	18
Configure a JSE as MIME Type	19
Client Computers	20

---

Upgrading from an Older Version of the Planning Portal . . . . .	20
Base Unit Settings . . . . .	23
Installing the Planning Portal . . . . .	24
Installation Options/Architecture. . . . .	25
Prerequisites . . . . .	25
Installation Process . . . . .	26
Planning Portal License . . . . .	39
Miscellaneous Installation Configurations . . . . .	41
Using .NET 2.0. . . . .	41
Write Access to the Planning Portal's Physical Directory. . . . .	42
Setting Up Integrated Windows Authentication . . . . .	43
Excel 2003 Primary Interop Assembly . . . . .	46
Enable the Planning Portal to launch Microsoft Excel on the Server .	49

---

**Chapter 3 Configuration 54**

Overview . . . . .	54
Admin Tool at a Glance . . . . .	55
Filter . . . . .	57
To Add a Filter . . . . .	57
To Delete a Filter . . . . .	58
View By . . . . .	58
To Add a Field . . . . .	58
To Delete a Field . . . . .	59
Aggregate Report. . . . .	59
Report Level. . . . .	59
Opinions . . . . .	60
New Item Link . . . . .	62
To Add a Field . . . . .	63
To Delete a Field . . . . .	63
Mass Adjust . . . . .	64
To Add an Opinion Line . . . . .	64

---

To Delete an Opinion Line . . . . .	.64
Promotions . . . . .	.65
Promo Search By . . . . .	.65
Grid Promo Items . . . . .	.65
Item . . . . .	.66
Formula Input . . . . .	.67
To Add a Row . . . . .	.67
To Delete a Row . . . . .	.68
To Edit a Row . . . . .	.68
Profile Forecast . . . . .	.70
To Add a Row . . . . .	.70
To Delete a Row . . . . .	.70
Miscellaneous . . . . .	.71
Database Connection . . . . .	.71
Round Mode . . . . .	.72
Decimal Pt . . . . .	.73
Others . . . . .	.73
Locale Configuration . . . . .	.75
To Add a Row . . . . .	.76
To Delete a Row . . . . .	.76
Symbols Locale . . . . .	.76
Labels Locale . . . . .	.77
Images Locale . . . . .	.80

---

**Chapter 4 Advanced Configurations 83**

Overview . . . . .	.83
Custom Settings . . . . .	.84
Settings . . . . .	.84
Retag . . . . .	.85
Views . . . . .	.89
Data Views . . . . .	.89

---

Field Views . . . . .	93
Hierarchy Management . . . . .	98
Custom Tasks . . . . .	100
User Permissions . . . . .	100
Data Filters . . . . .	102
Filters . . . . .	102
Exceptions . . . . .	103
Security . . . . .	104
Data Permissions . . . . .	104
User Security . . . . .	106
License Generator . . . . .	106
User Permission . . . . .	106
Add-Ins . . . . .	108
Promo Ad Types . . . . .	108
Promo Mappings . . . . .	108
RSS Providers . . . . .	110

Index 1

---

# Chapter 1 Introduction

## **This chapter includes:**

Section 1: Overview .....	7
Section 2: Documentation Conventions .....	9
Section 3: Acronyms and Abbreviations .....	10
Section 4: Software License; Intellectual Property .....	10

## **Section 1: Overview**

The most important part of the planning process is getting feedback from external participants to develop a better understanding of demand. Sharing information and managing Exceptions is the key to developing a productive relationship with customers and suppliers to develop a demand-driven supply chain. The Planning Portal provides the foundation for capturing input to take the planning process to the next level. It is directly integrated into the Demand Management Engine so existing configurations are leveraged to a maximum benefit.

### **1-1: Planning Portal Highlights**

- Supports different Views, including hierarchies
- Makes changes to the forecast
- Add Sales Promotions
- Add New Item(s)
- Retag Items (Item super session)
- Add or Edit Notes

### **1-2: Logging In**

To access the Planning Portal Admin Tool, go to:

Start > Programs > QAD Demand Management > Planning Portal Admin Tool

You must have a username and password to use the Planning Portal Admin Tool and do not need a separate username and password.

You can change your password in the Base Unit when you log in.

Table 1-1: Default Username and Password

Log In	Password
Username	default username
Password	default password

**Note:** *Usernames and passwords are case-sensitive.*

### 1-3: Logging Out

If you would like to log out of the application, close all web browsers. Make sure you click Save to prevent losing any content you added.

## Section 2: Documentation Conventions

### 2-1: Text

The following table lists text conventions in this user guide.

Table 1-2: Text Convention Descriptions

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

## 2-2: Screen Captures

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

## Section 3: Acronyms and Abbreviations

**Table 1-3:** Acronyms and Abbreviations used in this Manual

Term	Definition
DME	Demand Management Engine
PP	Planning Portal
DB	Database
IIS	Internet Information Services
OL	Opinion Line

## Section 4: Software License; Intellectual Property

### 4-1: Preamble

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## Chapter 2      Installation

### **This chapter includes:**

Section 1: Overview .....	14
Section 2: Requirements .....	14
Section 3: Prerequisites .....	17
Section 4: Upgrading from an Older Version of the Planning Portal ..	20
Section 5: Base Unit Settings .....	23
Section 6: Installing the Planning Portal .....	24
Section 7: Miscellaneous Installation Configurations .....	41

### **Section 1: Overview**

This chapter details the installation procedure for the Planning Portal application. Please follow the instructions carefully to ensure a successful installation.

### **Section 2: Requirements**

As mentioned above, the installation process for the Planning Portal is automated. However, there are certain hardware and software requirements necessary to ensure the application installs successfully.

## 2-1: Hardware

The list below details the required hardware to install the Planning Portal.

Table 2-1: Database Server Hardware Requirements

Hardware	Minimum	Recommended
CPU	Dual 850 MHz Pentium III	Quad 2.2 GHz Xeon Processors
RAM	2GB RAM	4GB RAM
Hard Disk	Ultra SCSI - II, RAID 5 hard drive controller.  One to three 36GB Hard Drives	Ultra SCSI - II internal and additional RAID 5 Hard Drive controller.  Mirrored volume for system and temp files (36GB each drive).  Two RAID 5 Data volumes with three drives minimum (36 GB each drive).

Table 2-2: Web Server Hardware Requirements

Hardware	Minimum	Recommended
CPU	Dual 850 MHz Pentium III	Quad 2.2 GHz Xeon Processors
RAM	2GB RAM	4MB RAM

Table 2-2: Web Server Hardware Requirements

Hardware	Minimum	Recommended
Hard Disk	Ultra SCSI - II, RAID 5 hard drive controller.  1 - 3 36GB Hard Drives	Ultra SCSI - II internal and additional RAID 5 Hard Drive controller.  Mirrored volume for system and temp files (36GB each drive).  One RAID 5 Data volumes on separate controller channels with 3 drives minimum (36 GB each drive).

**Note:** *The PP Admin Tool has to run on the same computer with the Planning Portal. Since the Admin Tool changes the settings defined in web.config file (Planning Portal configuration file), this needs to be executed in the Web Server.*

Table 2-3: Client Machine Hardware Requirements

Hardware	Minimum	Recommended
CPU	Pentium III - 500 MB	Pentium IV- 2.0 GB Pentium M - 1.2 GHZ
RAM	256 MB	512 MB
Hard Disk	10G	10G

## 2-2: Software Media

### 2-2-1: Database Server

- Windows 2000 Server or Windows 2003 Server. The most current Service Packs are highly recommended.

- SQL 2005 Enterprise Edition (the most current service packs are highly recommended). If SQL Server is not installed, the Demand Management Engine provides the option to install MSDE instead.

### **2-2-2: Web Server**

- Windows 2000 Server or Windows 2003 Server. The most current Service Packs are highly recommended.
- IIS 6.0 or greater
- .NET 2.0 or greater
- ADO 2.8
- Installer 3.1
- Microsoft Excel 2003 Primary Interop Assembly (PIA)

### **2-2-3: Client Machine**

- Windows 2000/Windows XP
- Office 2000 or greater (if you want to export to Excel)
- Internet Explorer 6.0 or higher.

**Note:** *You can download and install .NET 2.0, ADO 2.8, and Installer 3.1 from [www.microsoft.com](http://www.microsoft.com).*

## **Section 3: Prerequisites**

The list below details the prerequisites prior to beginning the installation.

- IIS 5.1 or greater
- Windows Installer 3.1
- Microsoft .NET Framework 2.0

- Microsoft Excel 2003 Primary Interop Assembly (PIA)

**Note:** *If IIS is not on the Web Server, but .NET Framework 2.0 already is, then do the following:*

- Install IIS. Go to the DOS prompt and change the directory to:

```
C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727>
```

- Run the following command:

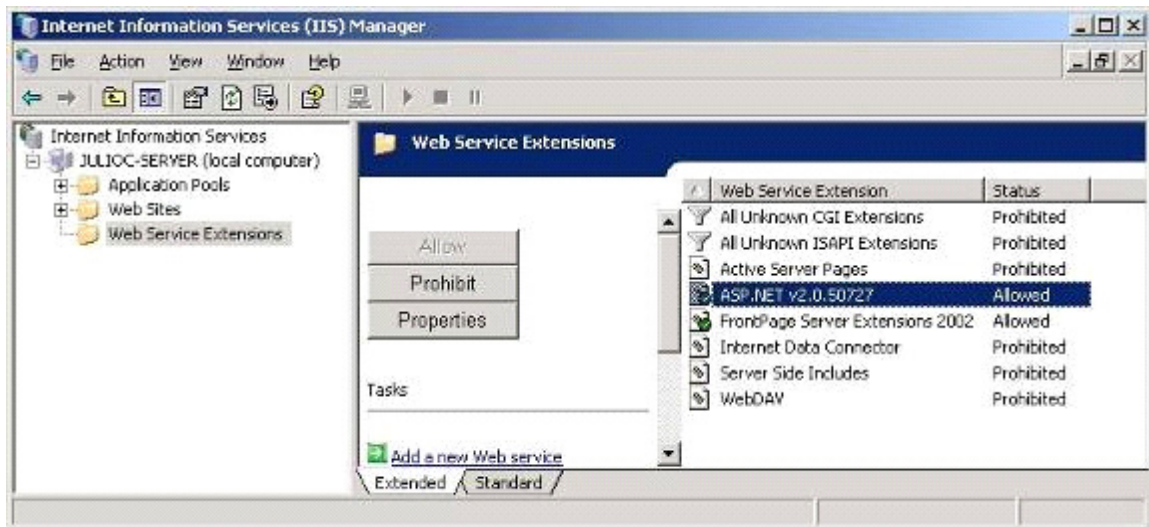
```
"C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727>aspnet_regiis -i"
```

### **3-1: Microsoft .NET Framework 2.0**

You must verify that ASP.NET 2.0 can run on the web server; this can be done by finding it in web server extensions.

1. Go to My Computer > Program Files > Windows > Internet Information Services (IIS) Manager.
2. Click on Web Service Extensions under your computer.

The Web Service Extensions window displays to the right as shown below.



3. Right-click on ASP .NET v2.0 50727 and click on Allow in the window.
4. Close the window when finished.

### 3-2: Configure a JSE as MIME Type

You must configure a JSE as a MIME Type.

1. Go to My Computer > Program Files > Windows > Internet Information Services (IIS) Manager.
2. Right-click on the SERVERNAME (local computer) node.
3. Click on Properties.
4. Click on the MIME Types button.
5. Click New to add entry.
6. Type **.jse** in the extension textbox.

7. Type **application/x-javascript**.
8. Click OK to close the dialog box.
9. Click OK to close the Property dialog box.
10. Right-click on the SERVERNAME (local computer).
11. Select All Tasks.
12. Click Restart IIS... to apply the change made.

### **3-3: Client Computers**

Client computers require the following software media to ensure the Planning Portal is used optimally:

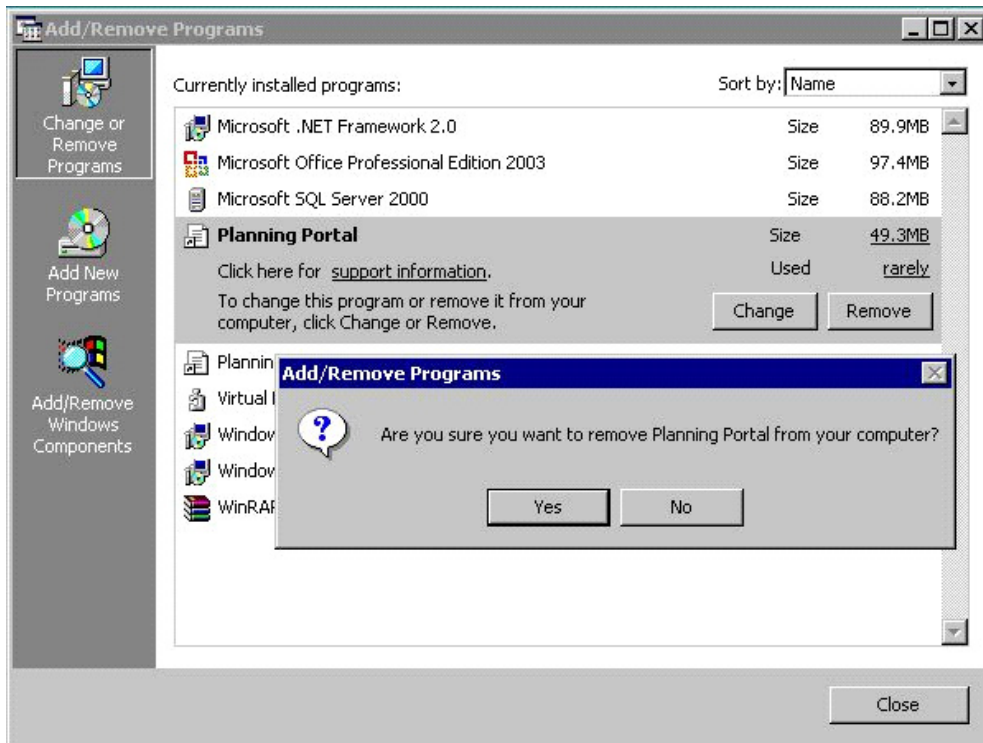
- Microsoft Internet Explorer 6.0.
- Microsoft Hotfix for Internet Explorer (KB 923996). Please download this hotfix from this location:<http://intersoftpt.com/TDN/Downloads/WindowsXP-KB923996-v2-x86-ENU.zip>.
- Macromedia Flash plug-in for Internet Explorer.

## **Section 4: Upgrading from an Older Version of the Planning Portal**

1. Remove the current version of the Planning Portal.  

Start > Control Panel > Add/Remove Programs > Planning Portal.
2. Click on Remove.

The Add/Remove Programs window displays.

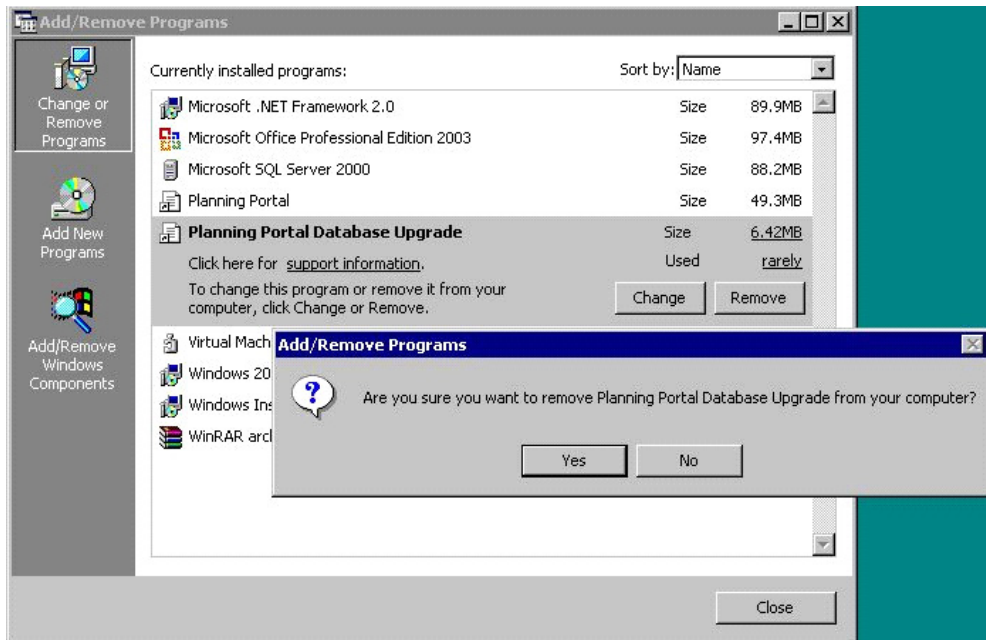


3. Click Yes.
4. Remove the Planning Portal Database Upgrade Tool.

Start > Control Panel > Add/Remove Programs > Planning Portal Database Upgrade.

5. Click on Remove.

The Add/Remove window displays.




6. Click Yes.
7. Install the latest version of the Planning Portal as detailed in [Section 6: Installing the Planning Portal](#).

**Note:** *When performing a new installation, the installer deletes all the user permissions, retags, reports, license key, and custom settings. The installer for this version does not support upgrading from previous versions of the Planning Portal. Backup the current data and export to the new version manually.*

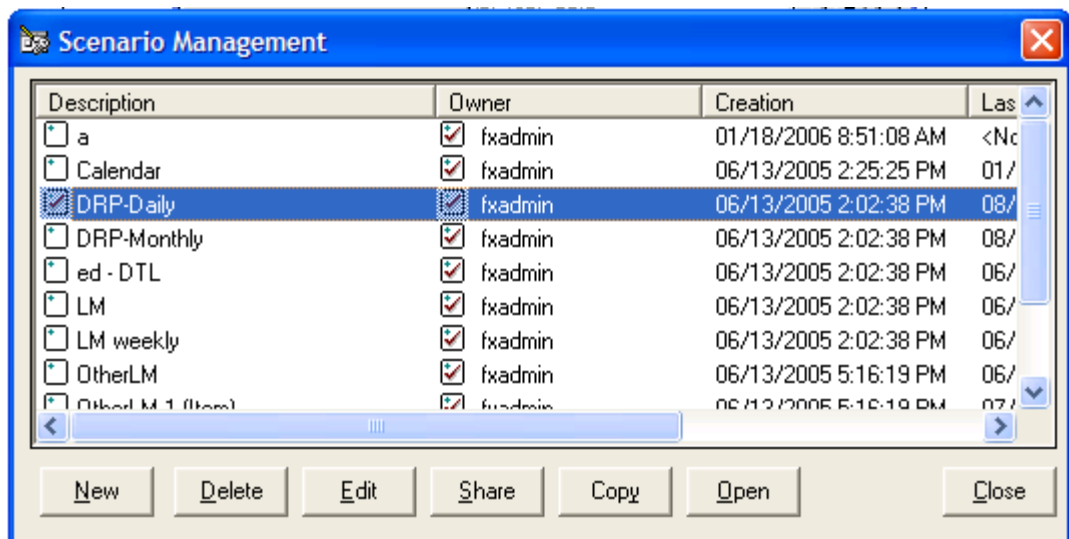
**Note:** *Field View and Data View created in earlier Planning Portal versions do not work in the new version. The migration process needs to be done manually.*

## Section 5: Base Unit Settings

You must edit the Living Master scenario that is to be used with the Planning Portal.

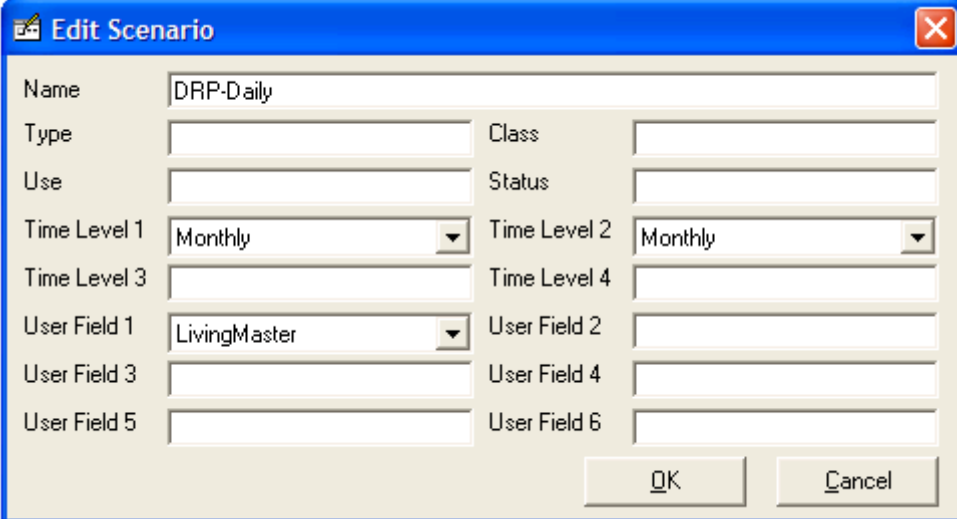
1. Log into the Base Unit.
2. On the Data Capture tab, go to Scenario Management by clicking on the  icon next to Scenario.

The Scenario Management window displays.




3. Select the scenario to be used and click Edit.

The Edit Scenario window displays.



Name	DRP-Daily		
Type		Class	
Use		Status	
Time Level 1	Monthly	Time Level 2	Monthly
Time Level 3		Time Level 4	
User Field 1	LivingMaster	User Field 2	
User Field 3		User Field 4	
User Field 5		User Field 6	

OK Cancel

4. Type in WebForm in User Field 2.
5. Click OK.
6. Close the Scenario Management window.
7. Save your changes in the Base Unit window by clicking on the  icon at the bottom.

## Section 6: Installing the Planning Portal

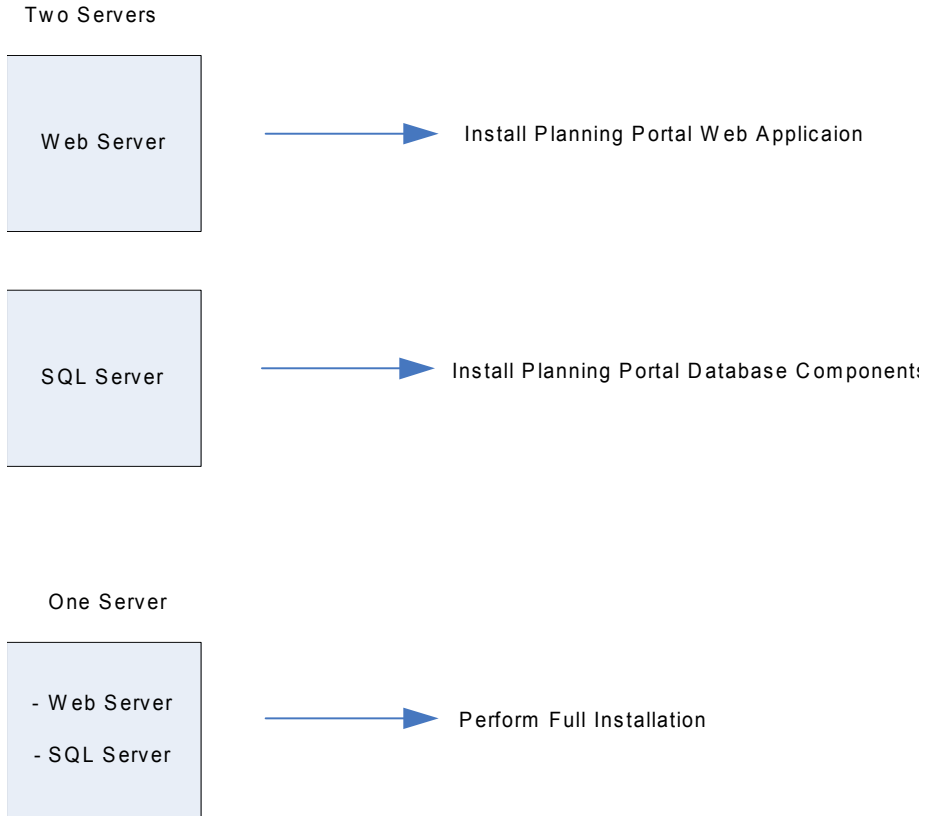
This section details how to install the Planning Portal successfully.

**Note:** *The Planning Portal installer does not allow installation when using Network Places. For security reasons, .NET Framework does not allow an .exe file to run from a network location. The Planning Portal needs to be installed directly from the hard drive.*

## 6-1: Installation Options/Architecture

There are two different ways to install the Planning Portal. Depending upon your network configuration, you can install the application on either one server or two.

The illustration below depicts the two ways to install.



## 6-2: Prerequisites

The list below details the prerequisites prior to beginning the installation.

- Demand Management Engine installed.
- A Living Master Scenario (or a default DTL Scenario).

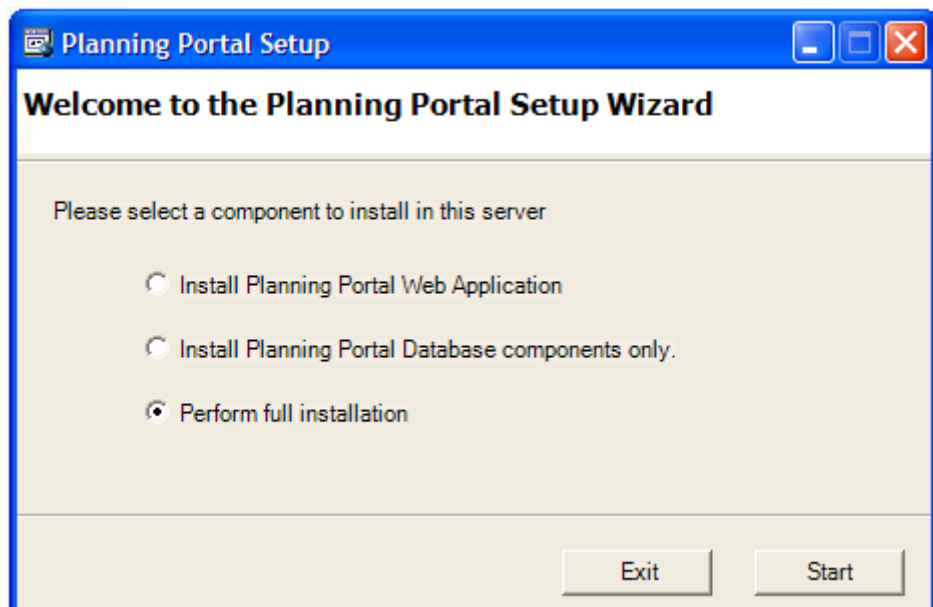
### 6-3: Installation Process

1. Contact QAD Inc. Services Team for the installation file.  
The table below details the files needed.

Description	
DB Folder	Installs the database for the PP.
PP Folder	Installs the application.
PPSetup.exe	Runs the installation.

2. Click on the PPSetup.exe file.

The Planning Portal Setup window displays.



The following table details the three types of installations.

Description	
PP Web Application	Use this option for installation on the Web Server, if the Web Server and Sql Server are on different computers.
PP DB Components	Use this option for installation on the Sql Server if the Web Server and Sql Server are on different computers.
Full Installation	Use this option if the Web Server and Sql Server are on the same computer.

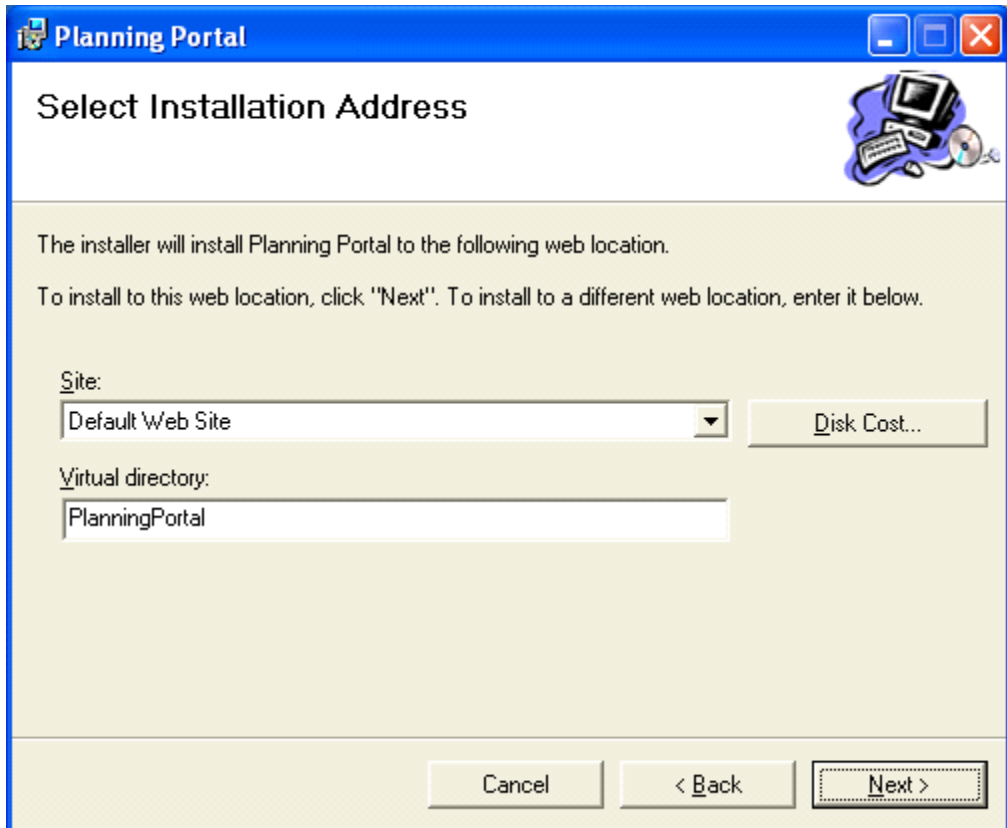
3. Click Start.

The Planning Portal Setup Wizard window displays.



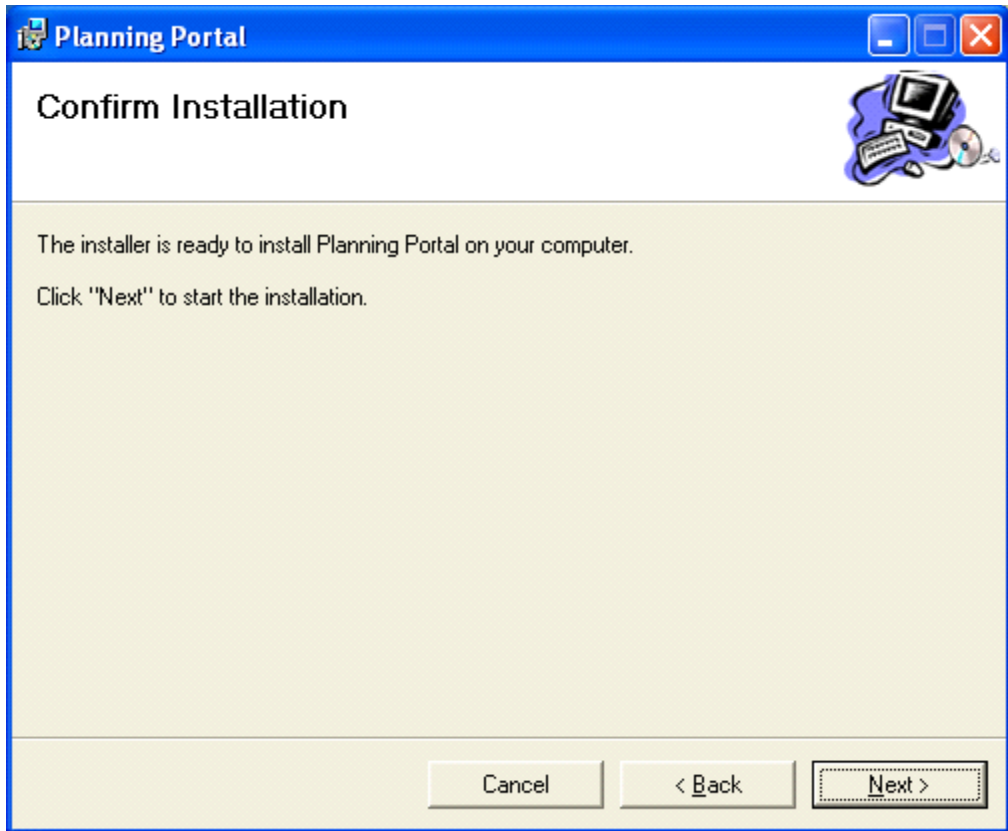
4. Click Next.

The Select Installation Address window displays.



5. Select the website and virtual directory where you would like to install Planning Portal and click Next.

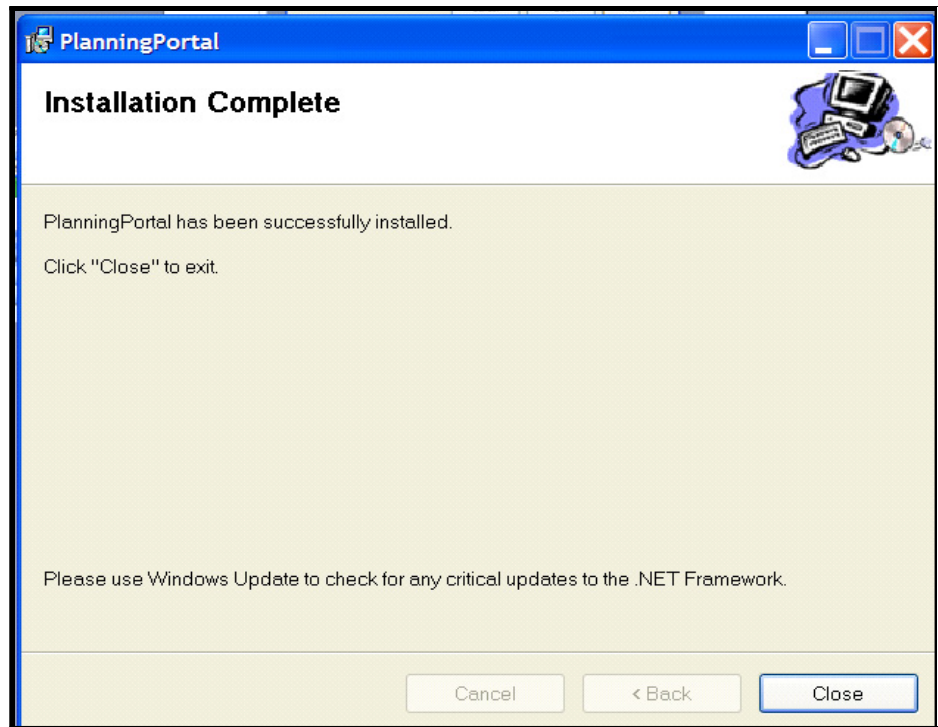
The Confirm Installation window displays.



6. Click Next to begin the installation.

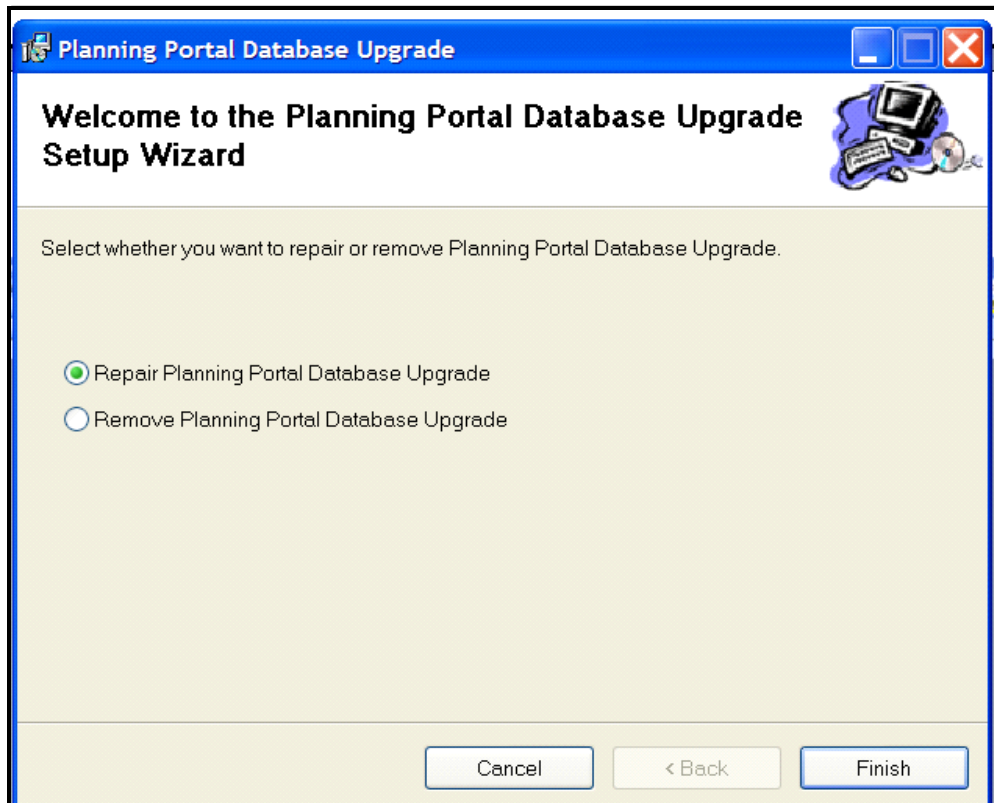
The Planning Portal is then installed. The installation takes approximately two minutes.

7. After the installation is complete, the Installation Complete window displays.



8. Click Close.

If you had chosen the option Install the Planning Portal Database components only or Full Installation, then the following window displays.



9. Select Repair Planning Portal Database Upgrade.

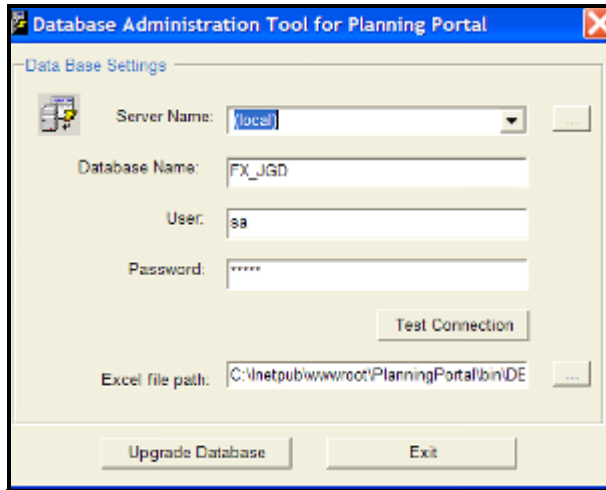
10. Click Finish.

If you had chosen the option Install the Planning Portal Database components only, then the following window displays.

**11.** Leave the default Folder as is and ensure that Everyone is selected.

**12.** Click Next.

The Planning Portal Database is then installed. After the installation is complete, the Planning Portal Admin tool window displays.



The table below details the information needed.

Description	
Server Name	Type in the name of the server.
Database Name	Type in FX_JGD or your designated database name.
User	Type in the default username - <b>sa</b> . It is recommended that the System Administrator username is always used.
Password	Type in the default password - <b>sa</b> .

13. Click the Test Connection button.

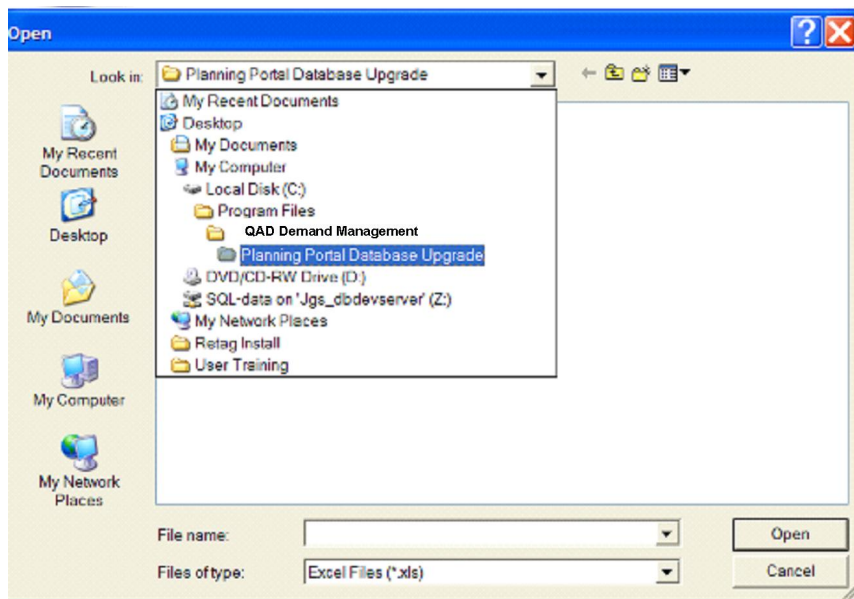
The DB Administration window displays if connection is successful.



14. In the Excel file path textbox, click Browse.

The Excel file path will default to:

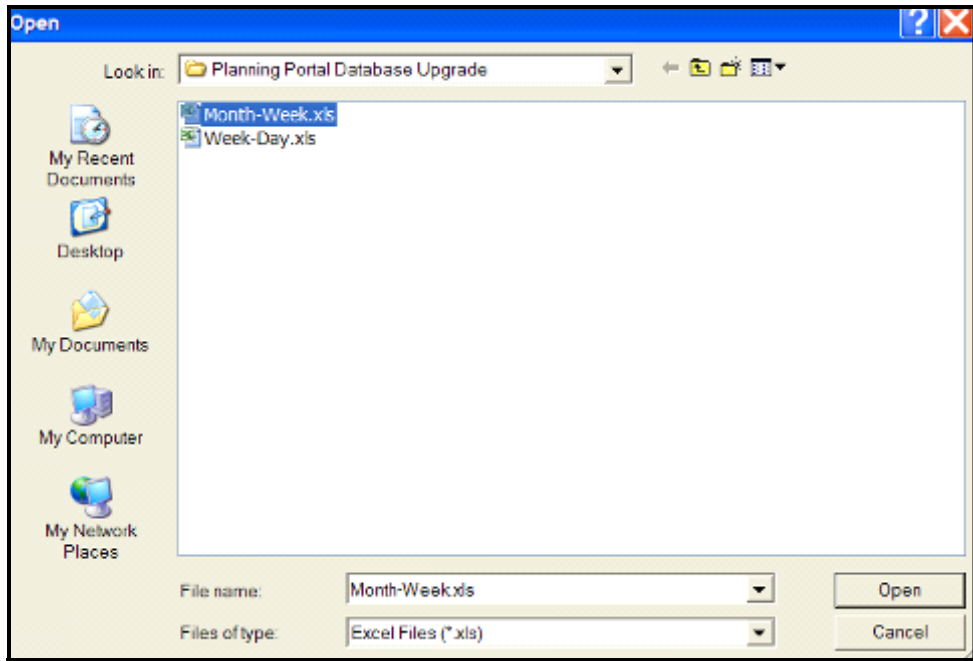
C:/Program Files/QAD Demand Management/Planning Portal Database Upgrade/



15. In the Planning Portal Database Upgrade folder, select one of the two Excel file options.

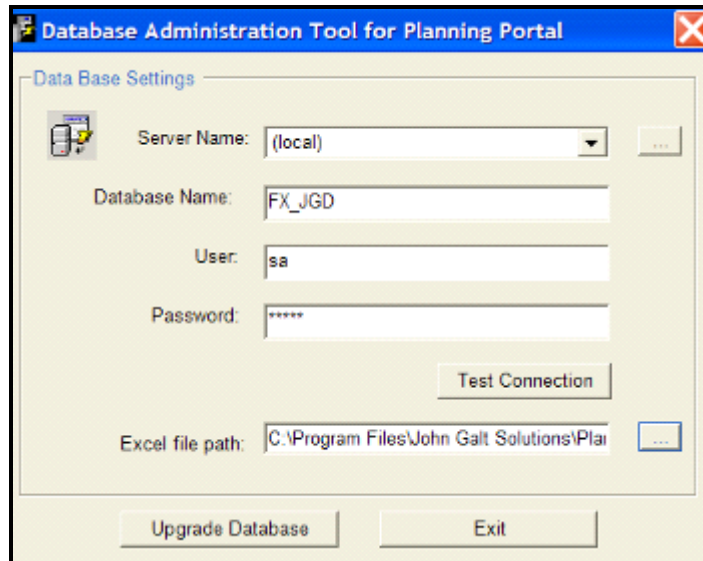
- Month-Week - if your Promotions are run weekly.

- Week-Day - if your Promotions are run daily.



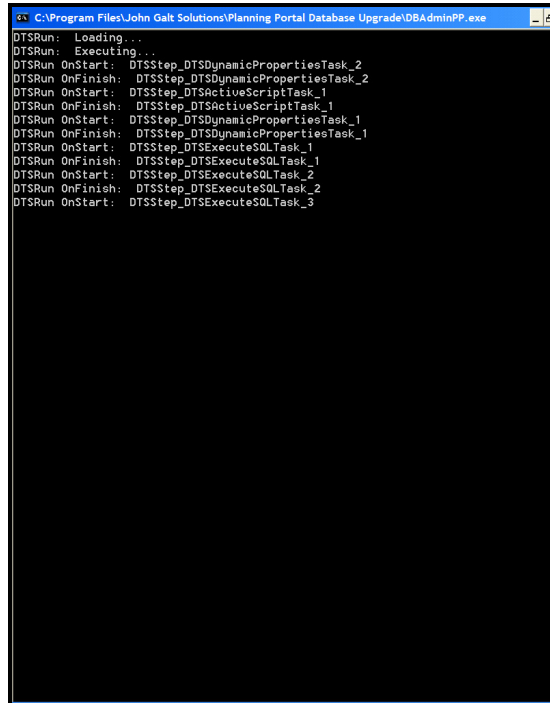
16. Click Open.

The Excel file path is now populated.



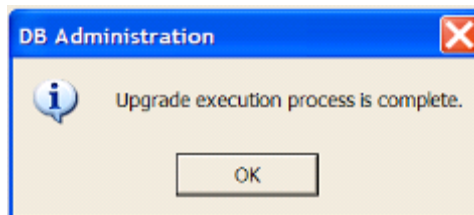
17. Click the Upgrade Database button.

The following window appears and a DTSRun program is run.



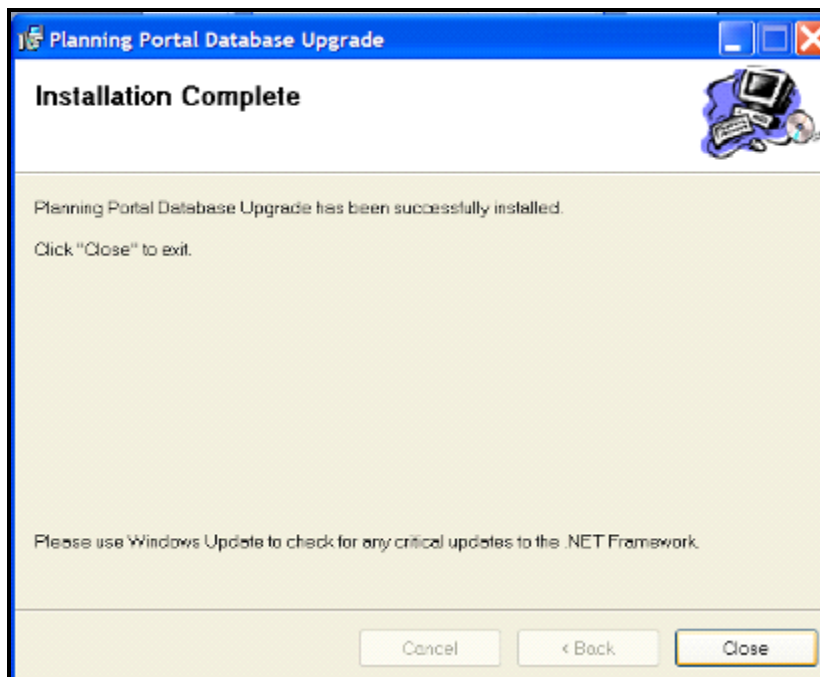
```
C:\Program Files\John Galt Solutions\Planning Portal Database Upgrade\DBAAdminPP.exe
DTSRun: Loading ...
DTSRun: Executing ...
DTSRun OnStart: DTSStep_DTSDynamicPropertiesTask_2
DTSRun OnFinish: DTSStep_DTSDynamicPropertiesTask_2
DTSRun OnStart: DTSStep_DTSActiveScriptTask_1
DTSRun OnFinish: DTSStep_DTSActiveScriptTask_1
DTSRun OnStart: DTSStep_DTSDynamicPropertiesTask_1
DTSRun OnFinish: DTSStep_DTSDynamicPropertiesTask_1
DTSRun OnStart: DTSStep_DTSExecuteSQLTask_1
DTSRun OnFinish: DTSStep_DTSExecuteSQLTask_1
DTSRun OnStart: DTSStep_DTSExecuteSQLTask_2
DTSRun OnFinish: DTSStep_DTSExecuteSQLTask_2
DTSRun OnStart: DTSStep_DTSExecuteSQLTask_3
```

The DB Administration window opens and confirms the upgrade was successful.



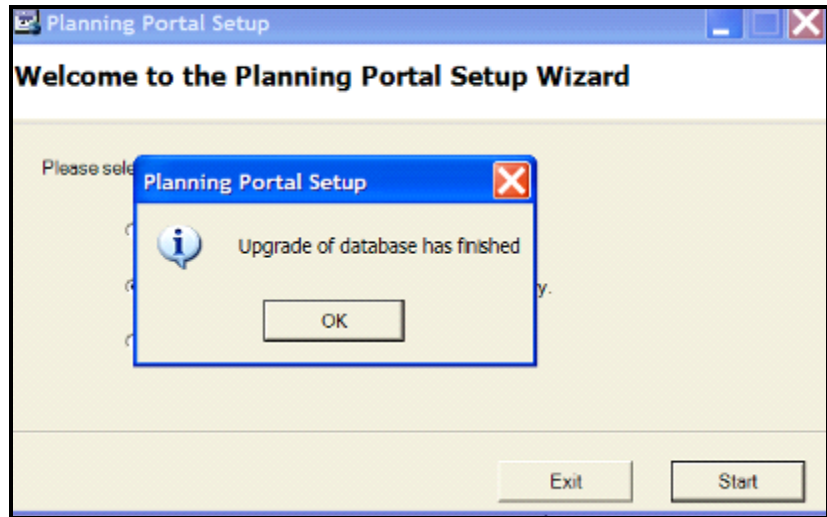
18. Click OK.

The Installation Complete window displays.



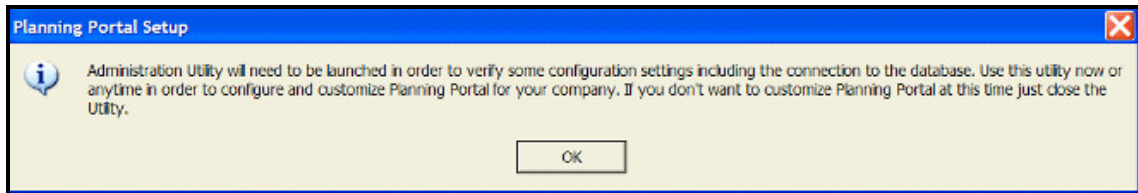
**19.** Click Close.

The Planning Portal Setup window displays.



20. Click OK.

If you chose either Install Planning Portal Web Application or Full Installation installation option, the Planning Portal Setup window displays. You can configure the Administration Utility now or at a later time.



21. Click OK to launch the Administration Utility.

**Note:** *To configure and customize the Planning Portal later, the Administration Tool can be found at Start > All Programs > QAD Demand Management > Planning Portal Admin Tool.*

## 6-4: Planning Portal License

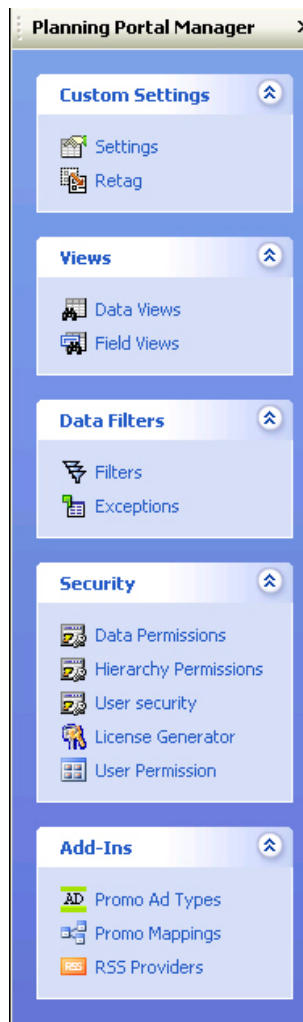
To begin using the Planning Portal, you must create a random serial number and a license key, which is provided by QAD Inc.

To generate your serial number:

1. Go to Start > All Programs > QAD Demand Management > Planning Portal Admin Tool.

The PP Admin Tool displays.

2. In the Planning Portal Manager in the left-hand pane, go to Security and click License Generator.



The screenshot shows a web-based interface with a light beige background. At the top, there is a text input field labeled "Serial Number" containing the alphanumeric string "118 95 89 66 73 62 82 82 59 68 50 59 70 118 75 76 79 51 76 72 76 76 58 58 58 58 60 78 50". Below this field are two buttons: "Generate" and "Copy". Below the buttons is a text input field labeled "Licence" which is currently empty.

3. Click Generate to generate a random serial number.
4. Click Copy to copy the serial number to your clipboard and send the serial number to QAD Inc. support email. You must contact QAD Inc. for a license key.

When you receive the license key from QAD Inc., repeat steps [1](#) and [2](#) and paste your license key in the License field.

5. Go to File > Save to save your serial number.
6. Close the Admin Tool.

## Section 7: Miscellaneous Installation Configurations

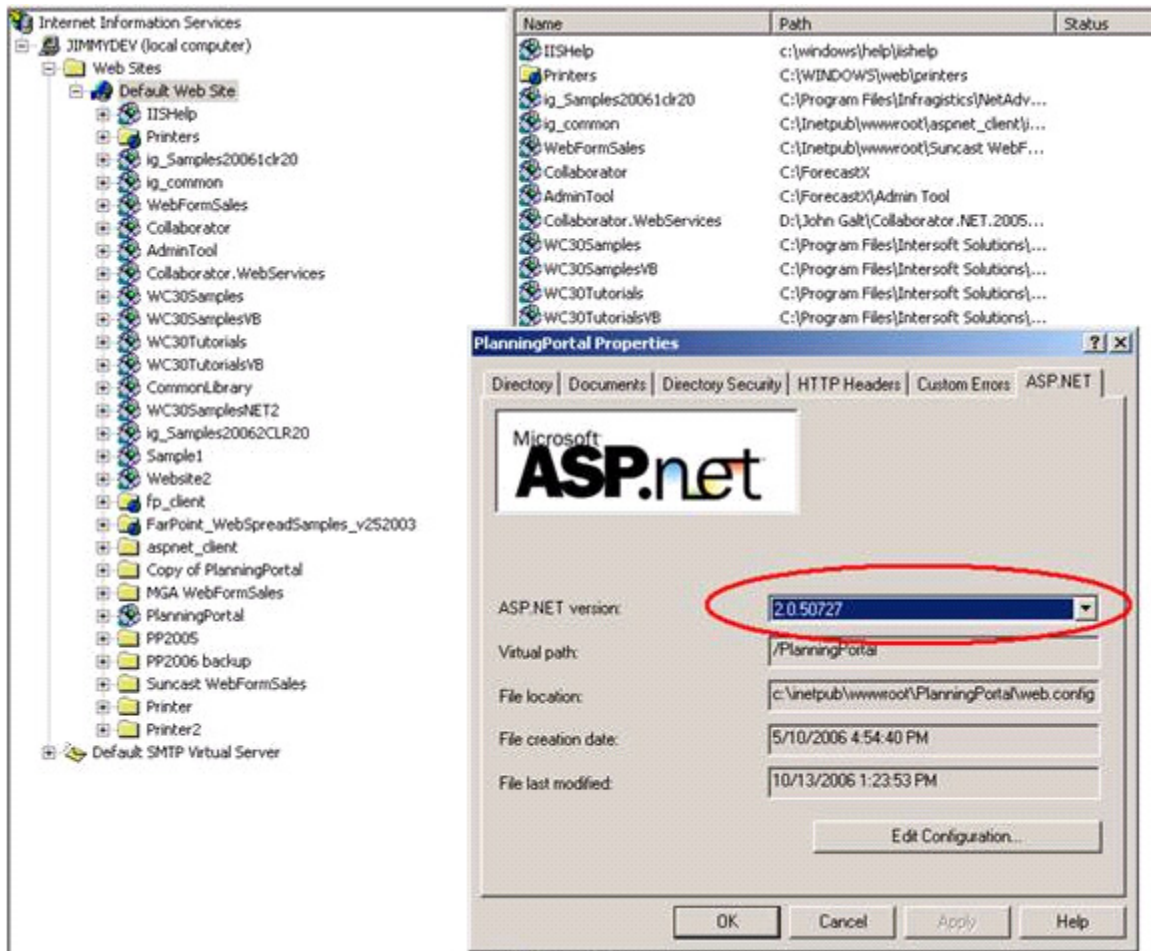
The sections below detail additional configurations for installing the Planning Portal successfully.

### 7-1: Using .NET 2.0

Ensure the Planning Portal is using .NET 2.0.

1. Open Internet Information Services.
2. Right-click over the Planning Portal virtual directory or the virtual directory that is used by the Planning Portal.

3. Click on ASP.NET.
4. Verify that .NET 2.0 version is selected. Otherwise, select that version to be used by the Planning Portal.



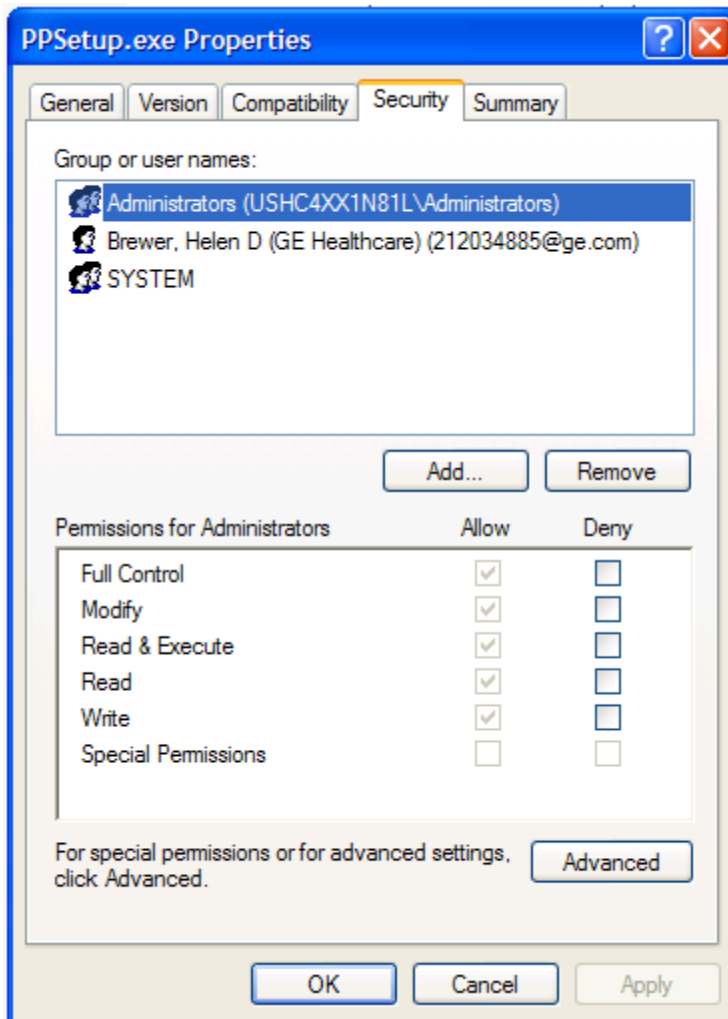
## 7-2: Write Access to the Planning Portal's Physical Directory

To enable Write access, you must select the Write permission to the Network Service account in the security properties of Planning Portal's physical directory.

1. Go to Planning Portal > PP Installation > App.

2. Right-click on PPSetup.exe and select Properties.

The PPSetup.exe Properties window displays.



3. Select the user you want to grant write access and click on the Allow checkbox.
4. Click Apply and then OK.

### 7-3: Setting Up Integrated Windows Authentication

The Planning Portal is designed to authenticate users either with Planning Portal Authentication or with Windows Integrated Authentication. The Windows Integrated Authentication feature depends on a similar setting of Internet Information Services.

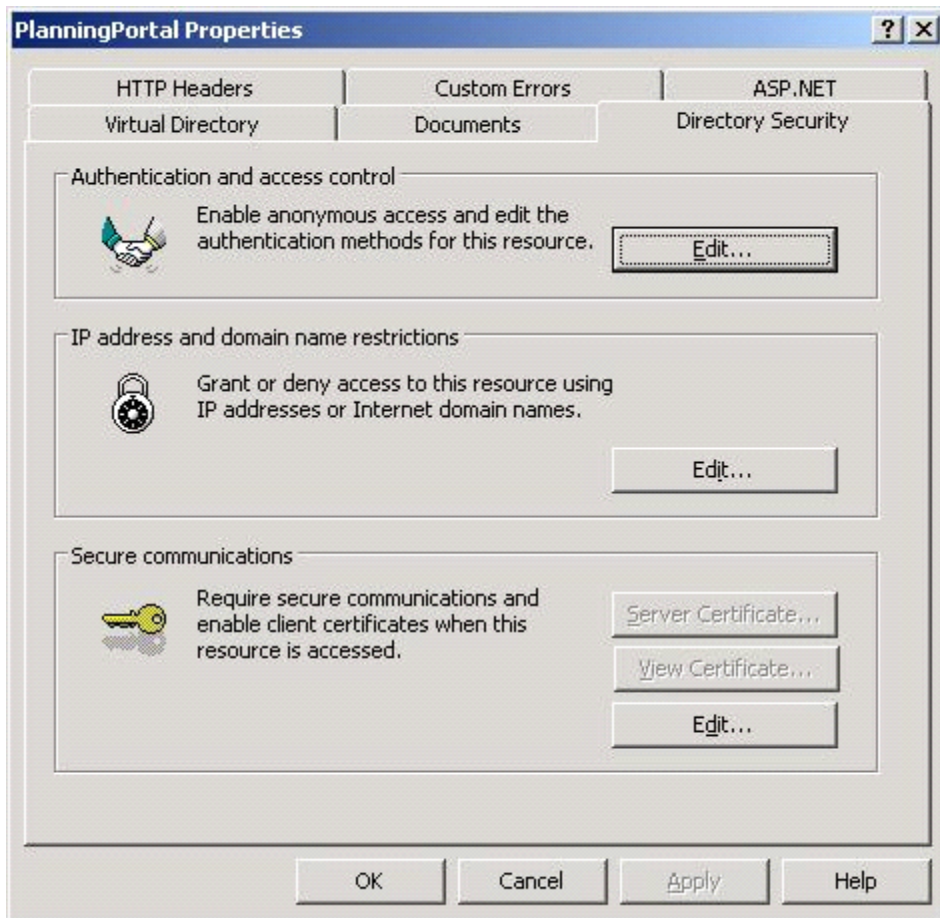
To enable Windows Integrated Authentication:

1. Open Internet Information Services (IIS) Manager.

`Start > My Computer > C:drive > Windows > IIS  
Manager.`

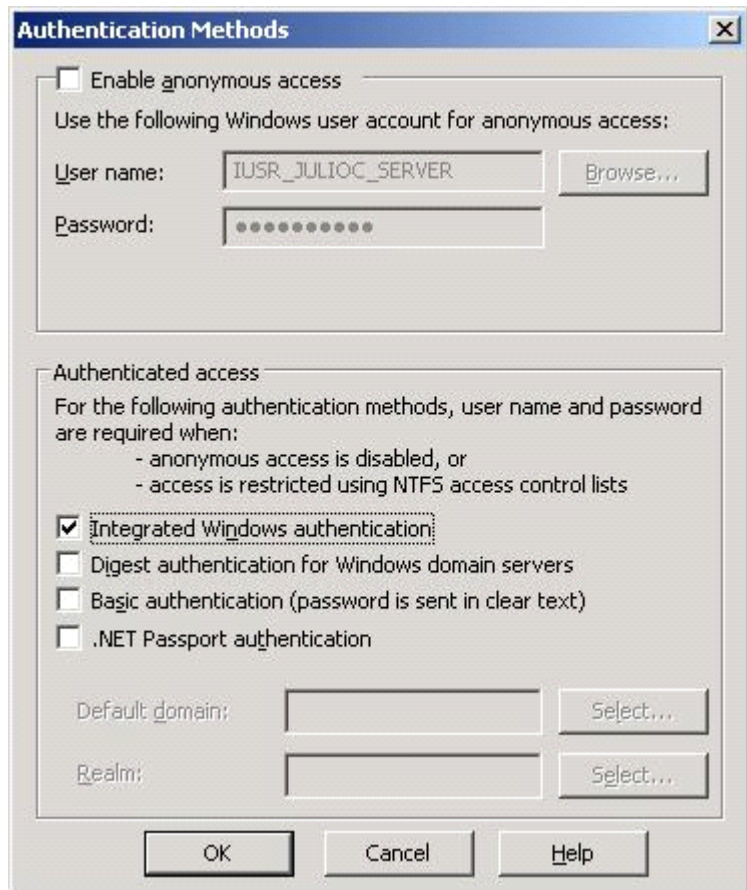
2. Right-click the Planning Portal virtual directory and choose Properties.

The PlanningPortal Properties window displays.



3. Select the Directory Security tab and click the Edit button in the "Authentication and access control" area.

The Authentication Method window displays.



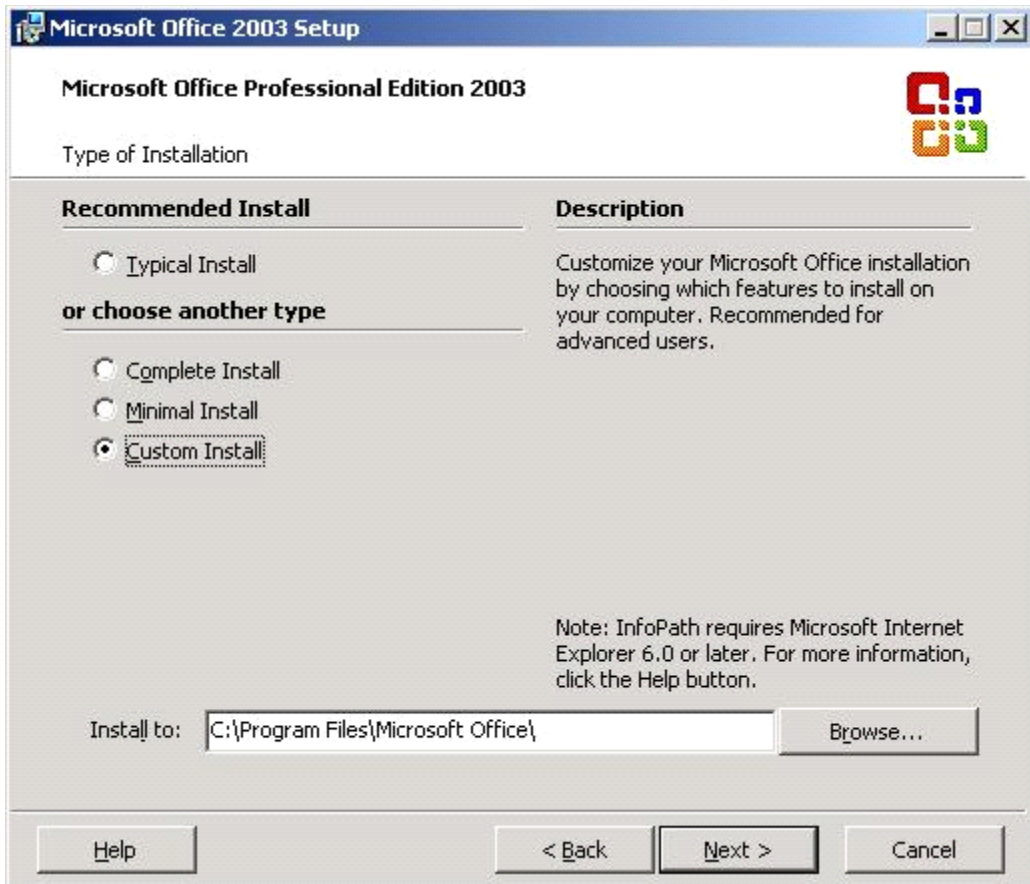
4. Uncheck the "Enable anonymous access" checkbox and check the Integrated Windows Authentication checkbox.
5. Click OK and close the window.

#### 7-4: Excel 2003 Primary Interop Assembly

The Excel 2003 Primary Interop Assembly (PIA) is a required DLL that enables the Planning Portal to send data and charts to Microsoft Excel. The PIA must be installed on the Web Server if you want to export data to Excel in the Classic View.

To install Microsoft Excel 2003 Primary Interop Assembly:

1. Start the Microsoft Office 2003 Install Wizard and click through the default selections until you reach the Type of Installation window dialog step.
2. Select Custom Install and click Next.

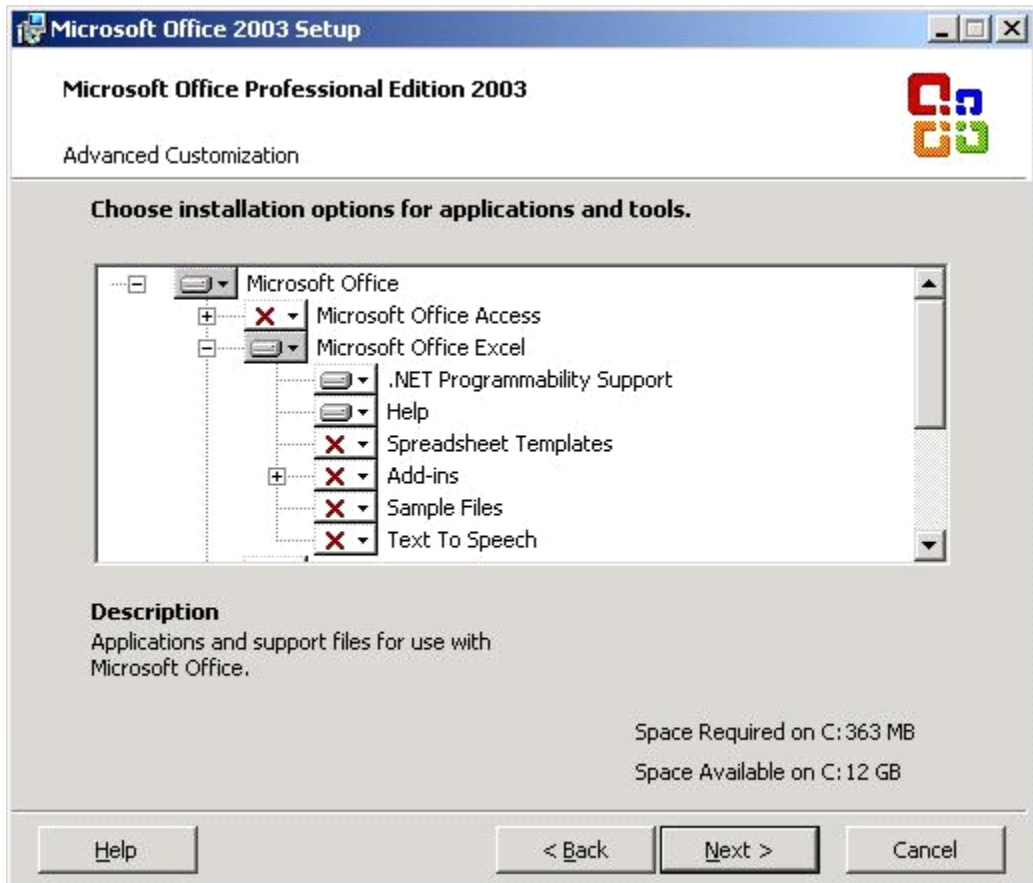


The Custom Setup window displays.



3. Select Choose advanced customization of applications and click Next.

The Advanced Customization window displays.



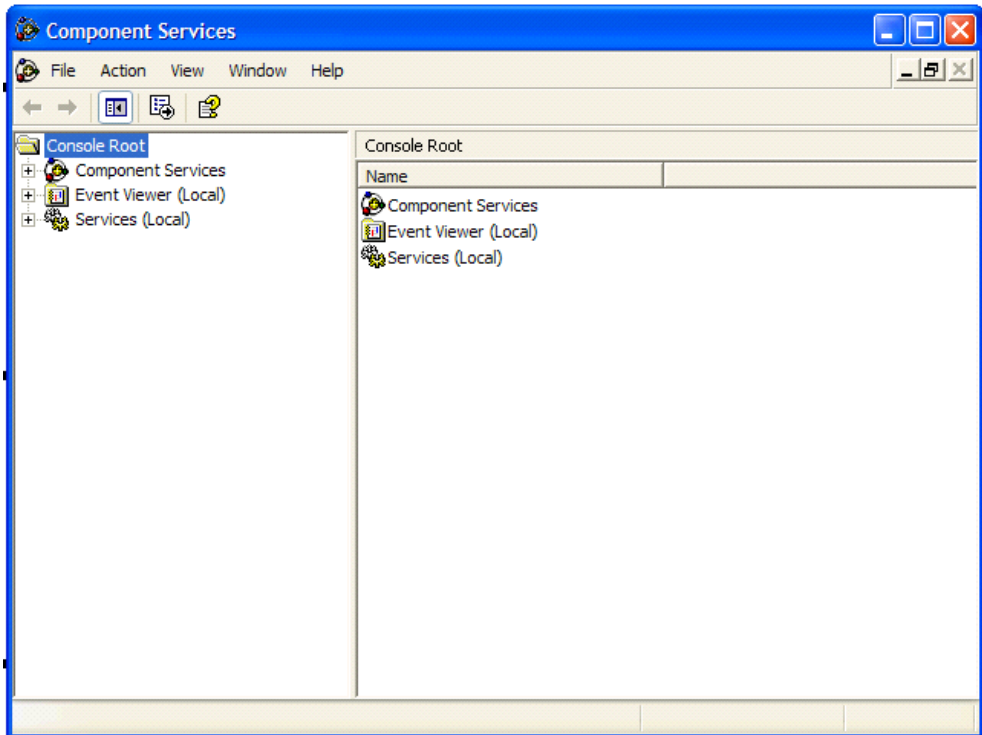
4. Expand the Microsoft Office Excel subtree and include .NET Programmability Support as a component to be installed.
5. Click Next.
6. Click Install in the next window and proceed with the default settings installation.

### 7-5: Enable the Planning Portal to launch Microsoft Excel on the Server

**Note:** *This procedure only applies to Windows Server 2003 installations that include Windows Server 2003 Service Pack 1.*

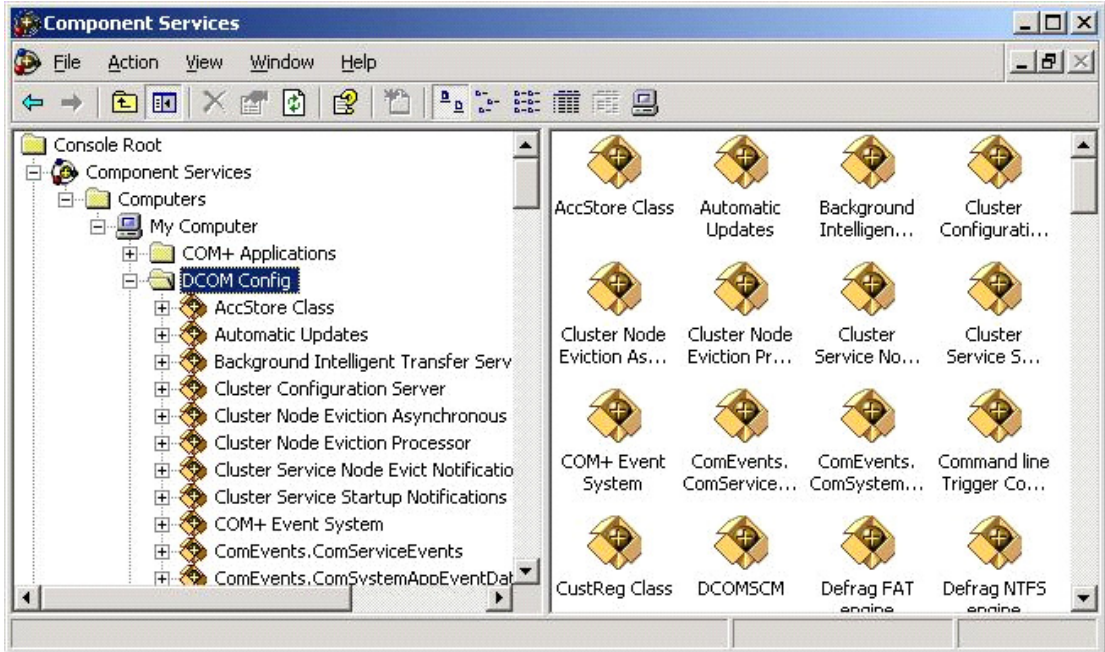
1. Go to Control Panel > Administrative Tools > Component Services.

The Component Services window displays.



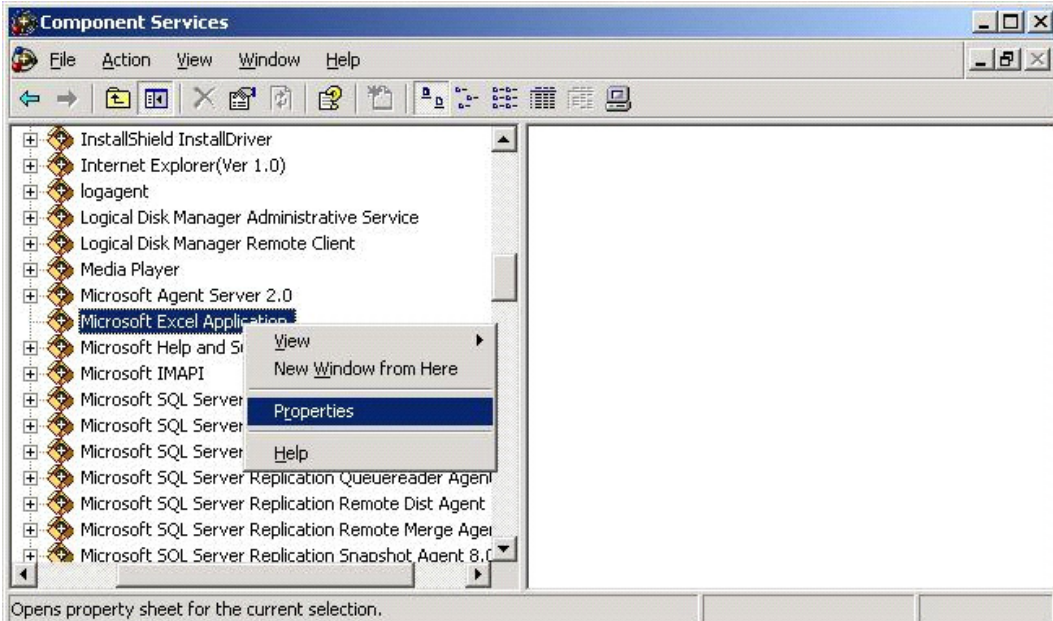
2. Go to Component Services > My Computer > DCOM Config.

3. Click on DCOM Config.



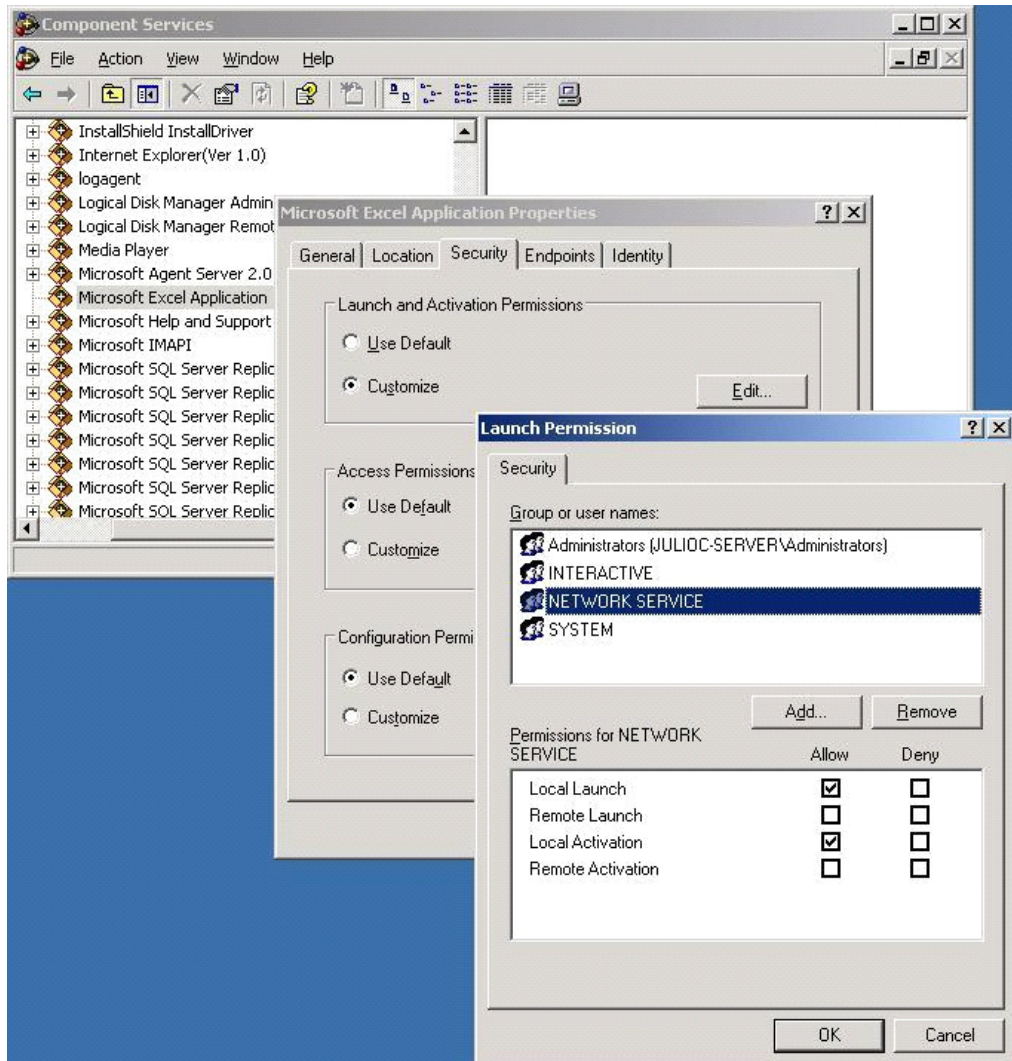
4. Scroll down until you find the Microsoft Excel Application node.

5. Right-click the Excel node and click Properties.



6. Select the Security tab and click Customize under Launch and Activation Permissions.
7. Click Edit to Launch and Activation Permissions option.

- In the Launch Permission window, add the Network Service account and grant it Local Launch and Local Activation permissions.



- Click OK.

---

## Chapter 3 Configuration

### This chapter includes:

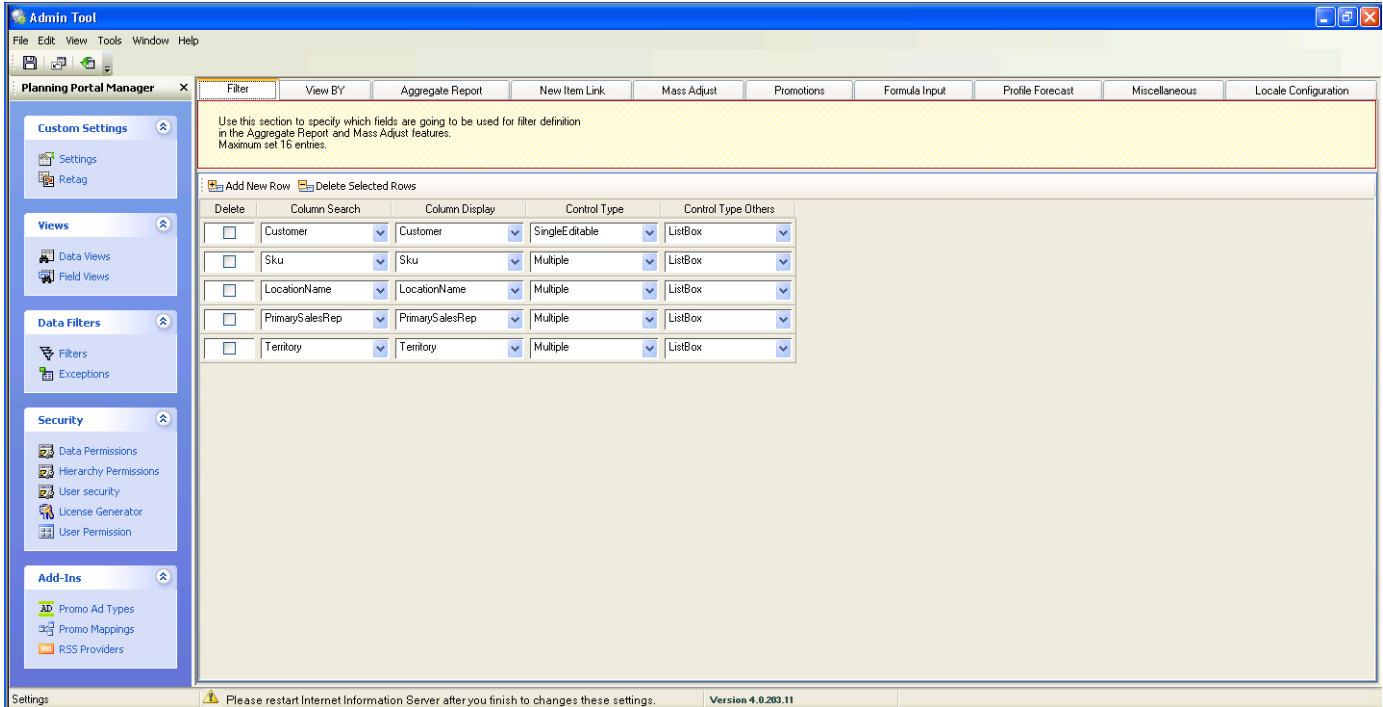
Section 1: Overview	54
Section 2: Admin Tool at a Glance	55
Section 3: Filter	57
Section 4: View By	58
Section 5: Aggregate Report	59
Section 6: New Item Link	62
Section 7: Mass Adjust	64
Section 8: Promotions	65
Section 9: Formula Input	67
Section 10: Profile Forecast	70
Section 11: Miscellaneous	71
Section 12: Locale Configuration	75

### Section 1: Overview

The features detailed in this chapter are displayed from the Custom Settings > Settings feature in the Planning Portal Manager in the left-hand pane.

## Section 2: Admin Tool at a Glance

The Admin Tool enables you to configure and customize the Planning Portal for end-users. The window below is the main page of the Admin Tool.



The following table details briefly each tab and the features of the Planning Portal Manager in the left-hand pane.

Table 3-1: Admin Tool tabs

Tab	Description
Filter	Determines which fields are going to be used for filter definition in the Aggregate Report and Mass Adjust features.
View By	Determines which View By fields are available.
Aggregate Report	For Opinions, determines which Opinion Lines are used in the Aggregate Report.
New Item Link	Determines which fields are used when creating a new item.
Mass Adjust	Determines which Opinion Lines are used in the Mass Adjust.
Promotions	Determines the configuration in Promo Note for both Promo Search By and Item.
Formula Input	Determines which formulas can be used in the Data Browser.
Profile Forecast	Determines which Opinion Lines are affected in the Profile Forecast.
Miscellaneous	For DB connection, determines the type of database connection is used. For Round Mode, determines how a number will be rounded. For Decimal Pt, provides how many decimal points for the data. For Other, provides additional information for data.
Locale Configuration	Determines the language for text, images, and labels.

## Section 3: Filter


Filters provide the ability to select items based on series attributes, as well as provide users the ability to manage, control and identify forecasts. The Filter tab enables you to determine which fields are used for the Filter definition in the Aggregate Report and Mass Adjust features.

Delete	Column Search	Column Display	Control Type
<input type="checkbox"/>	ProductClass	ProductClass	Multiple
<input type="checkbox"/>	Customer	Customer	SingleEditable
<input type="checkbox"/>	Sku	Sku	Multiple
<input type="checkbox"/>	Region	Region	Multiple

The table below details the types of configurations that can be used:

Configuration	Description
Column Search	Attributes that can be used for the filter.
Column Display	Description of the Attribute.
Control Type	<p>There are three types of controls:</p> <ul style="list-style-type: none"> <li>■ Multiple - multiple selection capability.</li> <li>■ Single editable - choose a field from the list or type in the search criteria.</li> <li>■ Text box - ability to type in the search criteria.</li> </ul>

### 3-1: To Add a Filter

1. Click on the  icon.

A new row displays at the bottom of the list.

### 3-2: To Delete a Filter

1. Click on the Delete checkbox next to the field and click on the



icon.

The row is then deleted from the list.

## Section 4: View By

The View By tab enables you to multiply the Opinion Lines by a conversion factor.

The table below details the type of configuration that can be used:

Configuration	Description
Column	Names of Opinion Lines that can be used as a conversion factor.

### 4-1: To Add a Field

1. Click on the  icon.

A new row displays at the bottom of the list.

### 4-2: To Delete a Field

1. Click on the Delete checkbox next to the field and click on the

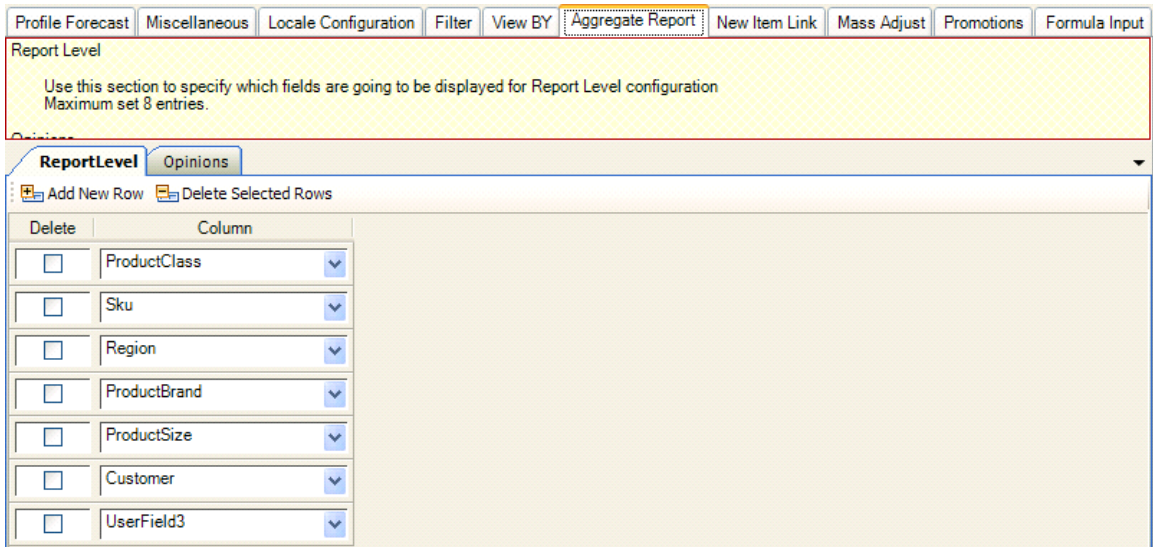


The row is then deleted from the list.

## Section 5: Aggregate Report

### 5-1: Report Level


The Report Level tab determines which fields are displayed in the Report Level. You can have up to eight fields listed.



The table below details the type of configuration that can be used:

Configuration	Description
Column	Determines which fields are displayed in the Report Level.

**5-1-1: To Add a Field**

1. Click on the  icon.

A new row displays at the bottom of the list.

**5-1-2: To Delete a Field**

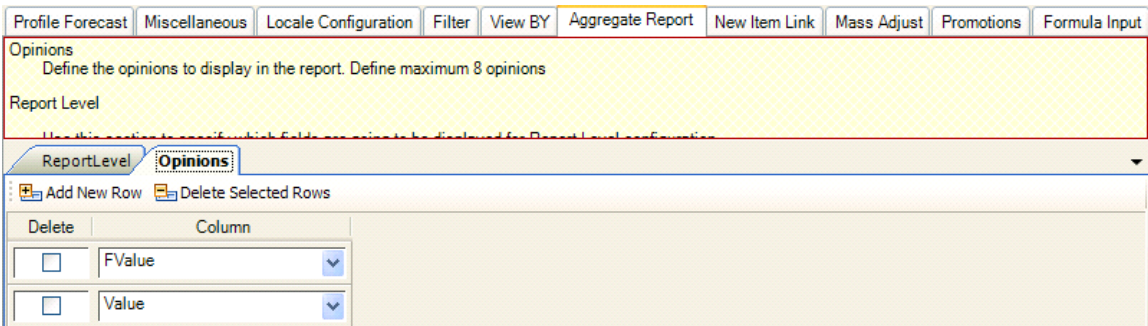
1. Click on the Delete checkbox next to the field and click on the



The row is then deleted from the list.

**5-2: Opinions**

The Opinion tab determines which Opinion Lines are displayed in the report. You can have up to eight Opinions Lines listed.




The table below details the type of configuration that can be used:

Configuration	Description
Column	Determines which Opinion Lines are displayed in the report.


---

### 5-2-1: To Add an Opinion

1. Click on the  icon.

A new row displays at the bottom of the list.

### 5-2-2: To Delete an Opinion

1. Click on the Delete checkbox next to the Opinion Line and click on the  icon.

The row is then deleted from the list.

## Section 6: New Item Link

The New Item Link tab determines which fields are used for the New Item Creation feature.

Profile Forecast Miscellaneous Locale Configuration Filter View BY Aggregate Report **New Item Link** Mass Adjust Promotions Formula Input

Define the fields to be use for new item creation

Delete	Column	Control	Use In Description	Default Value	Data Type
<input type="checkbox"/>	Sku	WebCombo	<input checked="" type="checkbox"/>		AlphaNumeric
<input type="checkbox"/>	ProductClass	DropDown	<input checked="" type="checkbox"/>		AlphaNumeric
<input type="checkbox"/>	ProductFamily	WebCombo	<input checked="" type="checkbox"/>		AlphaNumeric
<input type="checkbox"/>	Customer	WebCombo	<input type="checkbox"/>		AlphaNumeric
<input type="checkbox"/>	Price	WebCombo	<input type="checkbox"/>	2300	Numeric
<input type="checkbox"/>	Region	WebCombo	<input type="checkbox"/>		AlphaNumeric
<input type="checkbox"/>	ProductSize	TextBox	<input type="checkbox"/>		AlphaNumeric

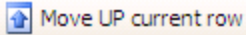
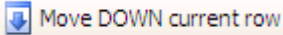
The table below details the types of configurations that can be used:

Configuration	Description
Column	Determines which fields are displayed in the New Item feature.
Control	<p>There are three options:</p> <ul style="list-style-type: none"> <li>■ Drop down - enables you to select from a list of what is already in that field.</li> <li>■ Text box - enables you to type in information in that field.</li> <li>■ Web Combo - combination of Drop down and Text box options.</li> </ul>
Use In Description	Determines whether or not the field is used in the description of the new item.
Default Value	This is the value selected by default.

Configuration	Description
Data Type	Determines if the field is a numeric or alpha-numeric value.


You can organize the fields to display in a certain order.

1. Select one of the fields in the list.

2. Click on the  Move UP current row or the  Move DOWN current row icons.


The row is then moved up or down, respectively, in the list.

### 6-1: To Add a Field

1. Click on the  icon.

A new row displays at the bottom of the list.

### 6-2: To Delete a Field

1. Click on the Delete checkbox next to the field and click on the  icon.

The row is then deleted from the list.

## Section 7: Mass Adjust


The Mass Adjust tab determines which Opinion Lines are used in the Mass Adjust feature.

Delete	Column	Selected
<input type="checkbox"/>	Value	<input type="checkbox"/>
<input type="checkbox"/>	FValue	<input checked="" type="checkbox"/>

The table below details the types of configurations that can be used:

Configuration	Description
Column	Determines which Opinion Lines are displayed in the mass adjust.
Selected	Check if the Opinion Line is selected by default.

### 7-1: To Add an Opinion Line

1. Click on the  icon.

A new row displays at the bottom of the list.

### 7-2: To Delete an Opinion Line

1. Click on the Delete checkbox next to the Opinion Line and click on the

 icon.

The row is then deleted from the list.

## Section 8: Promotions

### 8-1: Promo Search By

Define the configuration for the Promo Note feature

**Promo Search By** | Grid Promo Items | Item

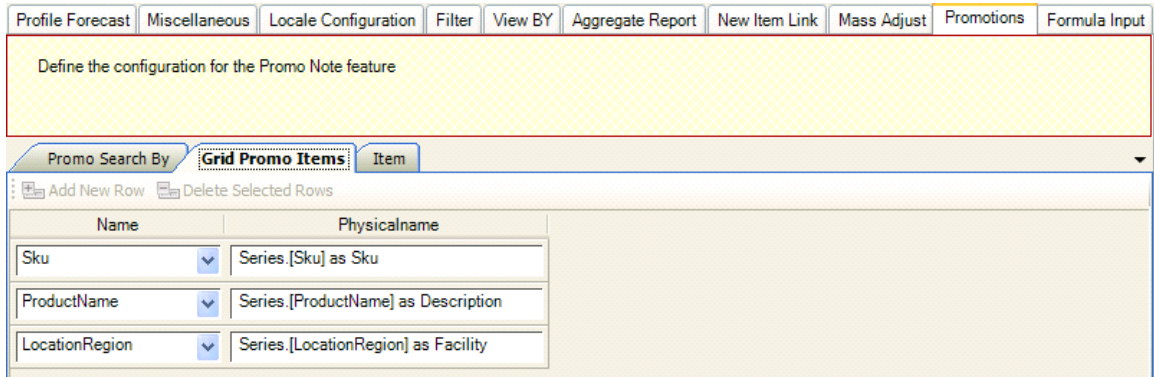
Add New Row | Delete Selected Rows

Column Search	Column Display	Customer Account Number	Company Number
Customer	Customer	Customer	LocationRegion

The table below details the types of configurations that can be used:

Configuration	Description
Column Search	Selects which column to search.
Column Display	Indicates description for the column displayed.
Customer Account Number	Displays customer account number.
Company Number	Displays company ID number.

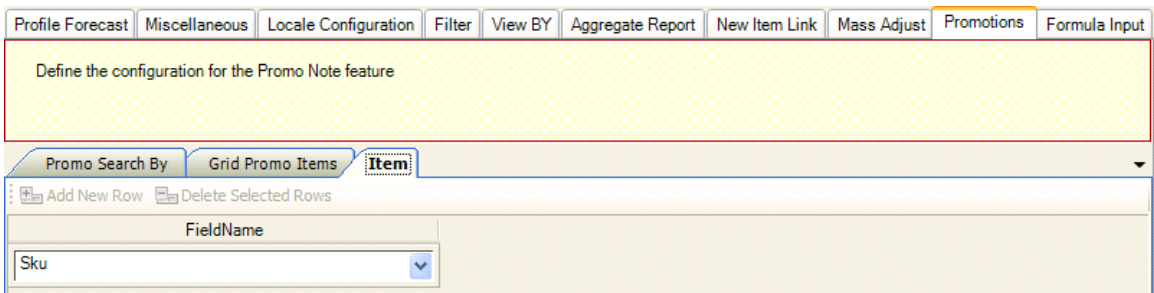
### 8-2: Grid Promo Items



The table below details the type of configuration that can be used:

Configuration	Description
Name	Three columns of Attributes that are used in combination to uniquely identify a series.
PhysicalName	Sql statement to return labels for the Attributes. (Advanced)

### 8-3: Item



The table below details the type of configuration that can be used:

Configuration	Description
Field Name	Field that holds the item code.


## Section 9: Formula Input

Delete	Target Field	Definition
<input type="checkbox"/>	UserValue01	(1+ConvFactor01/100)*FValue

The table below details the types of configurations that can be used:

Configuration	Description
Target Field	Determines where the results are displayed.
Definition	Determines the text of the formula (i.e., $A = B + C$ ; $A = \text{Target Field}$ , $B+C = \text{definition}$ )

### 9-1: To Add a Row

1. Click on the  icon.

A new row displays at the bottom of the list.

### 9-2: To Delete a Row

1. Click on the Delete checkbox next to the field and click on the

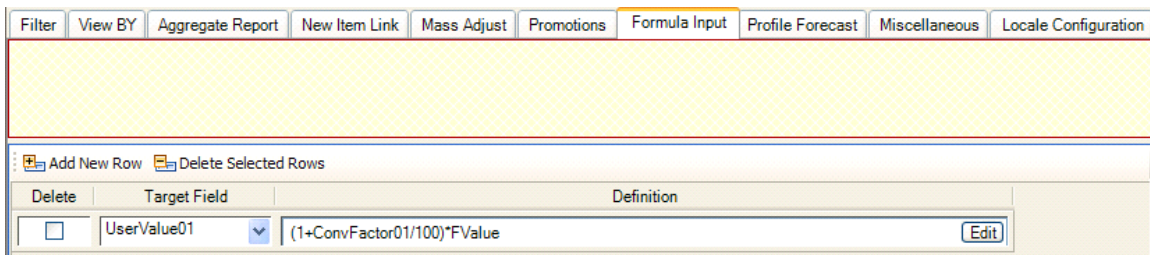


The row is then deleted from the list.

### 9-3: To Edit a Row

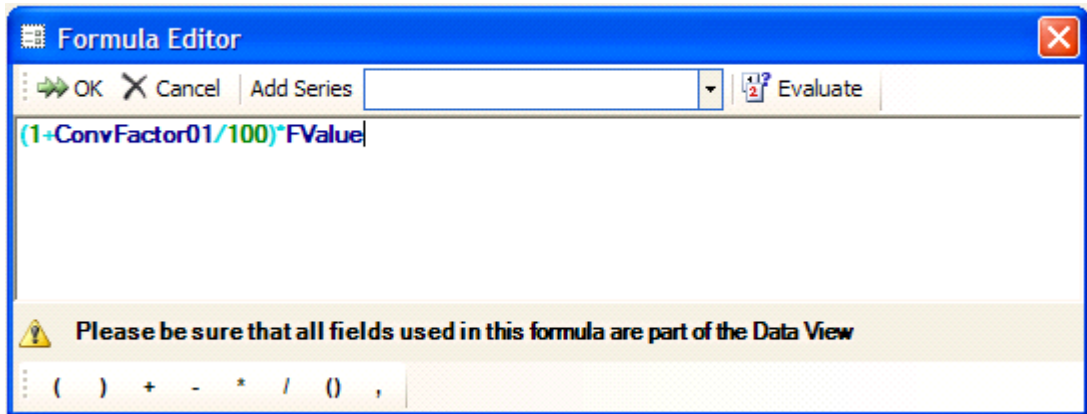
1. Click on the text box you would like to edit.

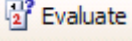
The Edit button displays in the textbox.



2. Click the **Edit** button.

The Formula Editor displays.



3. From the Add Series drop down, select the series you would like to edit.
4. Make your edits as necessary.
5. Click the  Evaluate button.
6. Click OK when finished.

**Note:** *The PP Admin Tool allows negative values to start in the formula, but the Planning Portal does not support it. The following work around can be used:*

$(\text{UserValue01} - \text{UserValue01} - \text{UserValue01}) = -\text{UserValue01}$

## Section 10: Profile Forecast


The Profile Forecast feature enables you to apply a predefined lifecycle curve to data. This feature is configured in the Base Unit/ Viewer.

Delete	Name	Selected
<input type="checkbox"/>	FValue	<input checked="" type="checkbox"/>
<input type="checkbox"/>	UserValue01	<input type="checkbox"/>
<input type="checkbox"/>	UserValue02	<input type="checkbox"/>
<input type="checkbox"/>	UserValue03	<input checked="" type="checkbox"/>

The table below details the types of configurations that can be used:

Configuration	Description
Name	Select the Opinion Line to be used.
Selected	Select if the Opinion Line is selected by default.

### 10-1: To Add a Row

1. Click on the  icon.

A new row displays at the bottom of the list.

### 10-2: To Delete a Row

1. Click on the Delete checkbox next to the field and click on the

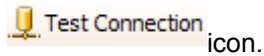
 icon.

The row is then deleted from the list.

## Section 11: Miscellaneous

### 11-1: Database Connection

The Database Connection tab details the configuration for the database. You can test the database connection by clicking on the



Profile Forecast | Miscellaneous | Locale Configuration | Filter | View BY | Aggregate Report | New Item Link | Mass Adjust | Promotions | Formula Input

---

**Database connection:** Round Mode | Decimal Point | Others

Add New Row
 Delete Selected Rows
 Test Connection

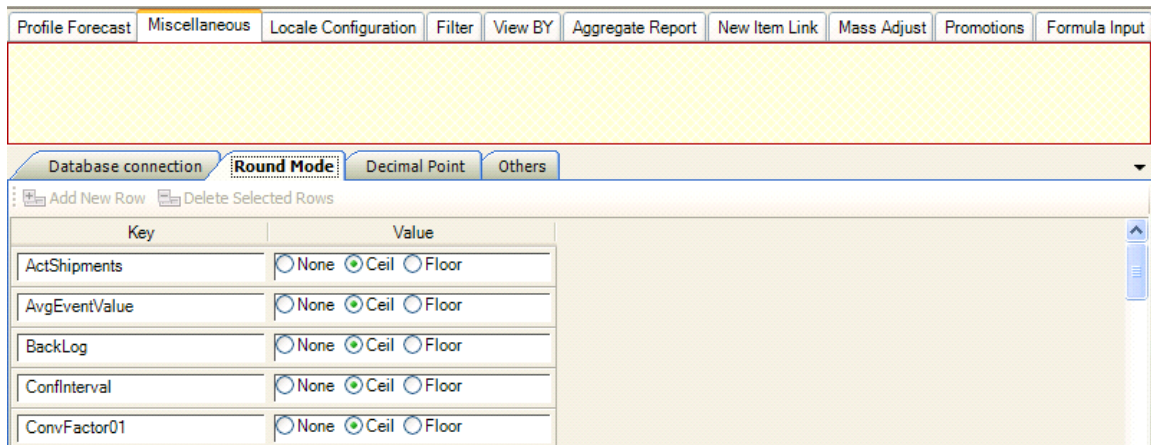
Key	Value
user id	sa
password	*****
data source	(local)
Connect Timeout	30
database	FX_JGD_VW
Pooling	<input checked="" type="radio"/> Yes <input type="radio"/> No

The table below details the types of configurations that can be used:

Key	Description
User ID	Database user's Username
Password	Database user's Password
Data Source	Database server name

Key	Description
Connect Timeout	Amount of time system attempts to connect before disconnecting.
Database	Database name
Pooling	Select if you would like to share connections between users (Recommended) (Advanced).

### 11-2: Round Mode



The table below details the types of configurations that can be used:

Configuration	Description
Key	Each Opinion Line listed.
Value	<ul style="list-style-type: none"> <li>■ None - Provides the value to the nearest whole number.</li> <li>■ Ceil - Rounds up number to the next whole number.</li> <li>■ Floor - Rounds down number to the next whole number.</li> </ul>

## 11-3: Decimal Pt

Key	Value
ActShipments	2
AvgEventValue	2
BackLog	2
ConflInterval	2
ConvFactor01	2

The table below details the types of configurations that can be used:

Configuration	Description
Key	Each Opinion Line listed.
Value	Number of decimal points displayed.

## 11-4: Others

Profile Forecast | Miscellaneous | Locale Configuration | Filter | View BY | Aggregate Report | New Item Link | Mass Adjust | Promotions | Formula Input

---

Database connection | Round Mode | Decimal Point | **Others**

Key	Value
CurrencyDriven	ConvFactor01,ConvFactor02
NoViewByIn	ConvFactor01,ConvFactor02
Rebalance	<input checked="" type="radio"/> Yes <input type="radio"/> No
StoreChangeInfo	<input type="radio"/> Yes <input checked="" type="radio"/> No
SCDateField	UserField4 <input type="button" value="v"/>
SCUserField	UserField5 <input type="button" value="v"/>
CustomTaskOnUpdate	<input checked="" type="radio"/> Yes <input type="radio"/> No
LockedPeriodOff	Value,Note,UserValue01,UserValue03
FrozenColumnCount	2
LogoHomePagePath	images/default-logo.gif
Microsoft.Office.Interop.Excel	<input type="radio"/> Yes <input checked="" type="radio"/> No

The table below details the types of configurations that can be used:

Key	Description
CurrencyDriven	Effected by currency.
NoViewByIn	Determines which fields are not affected by View By (conversion factor).
Rebalance	Causes changes to be distributed throughout if there is a hierarchy.
StoreChangeInfo	Determines if changes are to be tracked.
SCDateField	Field in series that holds the date when changes were made.
SCUserField	Field in series that holds the username who made the changes.

Key	Description
CustomTaskOn Update	Enables execution of the custom code when data changes (Advanced).
LockedPeriodOff	Disables the lock of certain fields from the last locked period.
FrozenColumnCount	Number of columns frozen in Detail or Classical views.
LogoHomePage Path	Enables you to customize your company's logo for the Getting Started page.
Microsoft.Office.Interop.Excel	Enables users to export data to Excel in Detail View from the Data Browser.

## Section 12: Locale Configuration

The Locale Configuration feature enables you to configure the language of the text, symbols and images for the User Interface of the PP.


The screenshot shows the 'Locale Configuration' tab selected in a software interface. Below the tab is a yellow grid area labeled 'Configure locale settings'. Below that is a table with columns for LanguageName, LanguageCode, IsoCode, and three Edit buttons (Symbols, Labels, Images). The table lists several languages including English, Spanish, French, German, Italian, and Portuguese.

LanguageName	LanguageCode	IsoCode	Edit	Edit	Edit
English - United	USA	en-US	Symbols	Labels	Images
Spanish - Mexico	MEX	es-MX	Symbols	Labels	Images
English - Canada	CAN	en-Ca	Symbols	Labels	Images
Français - LaFran	FRA	fr-FR	Symbols	Labels	Images
Deutsch - Deutsc	DEU	de-DE	Symbols	Labels	Images
Italiano - Le'Italia	ITA	it-IT	Symbols	Labels	Images
Brasil - Portugu	BRA	pt-BR	Symbols	Labels	Images

The table below details the types of configurations that can be used:

Configuration	Description
Language Name	Determines the language used for the Planning Portal.
Language Code	Defines the country for the language.
IsoCode	Defines the International Standard Code for the language.
Edit	<ul style="list-style-type: none"><li>■ Symbols - Changes symbols to the localized language.</li><li>■ Labels - Opens a text box where text can be edited from English to the localized language.</li><li>■ Images - Enables images to be edited to the localized language.</li></ul>

### 12-1: To Add a Row

1. Click on the  icon.

A new row displays at the bottom of the list.

### 12-2: To Delete a Row

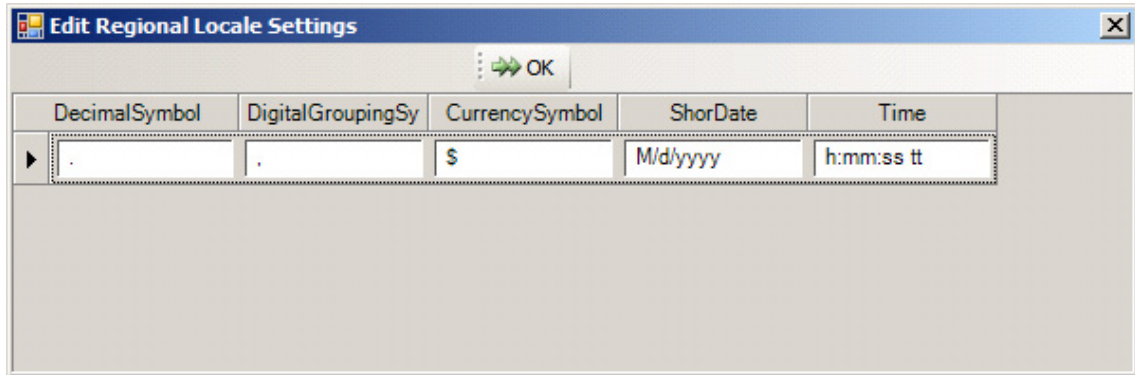
1. Highlight the Locale Setting and click on the  icon.

The row is then deleted from the list.

### 12-3: Symbols Locale

1. Click the Symbols button in the Edit column of the language you would like to translate to from English.

The Edit Regional Locale Settings window displays.



2. Type the translated symbols in the text boxes.

The table below details what each text box means.

Description	
DecimalSymbol	Input how decimal should be replaced.
DigitalGroupingSy	Input how comma separator for numbers should be replaced.
CurrencySymbol	Choose appropriate currency symbol.
ShorDate	Choose how dates are formatted. Default is M/D/YYYY.
Time	Choose how time is formatted. Default is h:mm:ss tt.

#### 12-4: Labels Locale

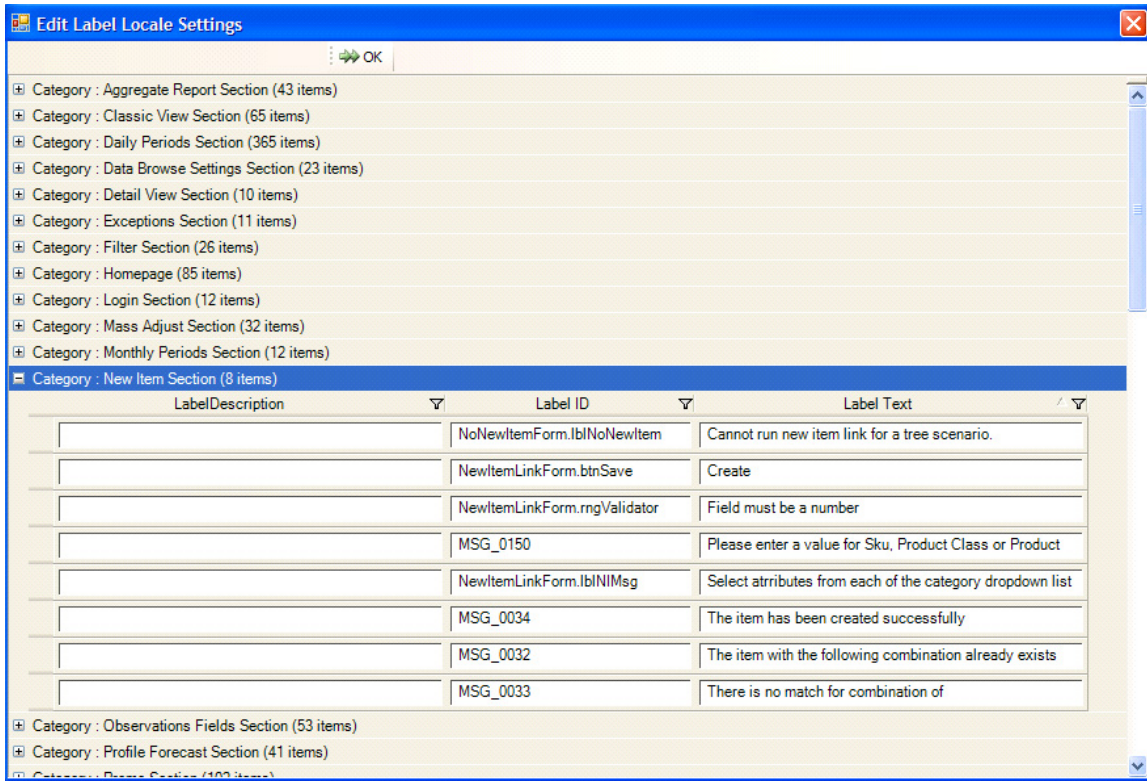
1. Click the Labels button in the Edit column of the language you would like to translate to from English.

The Edit Label Locale Settings window displays.



2. Click on the + to view a specific Category.

The Category expands.



3. Edit the labels as necessary.

The table below details what each text box means.

Description	
LabelDescription	Description for your reference.
LabelID	Label ID. Do not edit.
LabelText	Translate text into target language.

**Note:** *In the Categories Observations Field Section and Series Fields Section, when expanded a Display Set box displays at the top. At that point, you can input a Display Set.*

4. Click OK when finished.

## 12-5: Images Locale

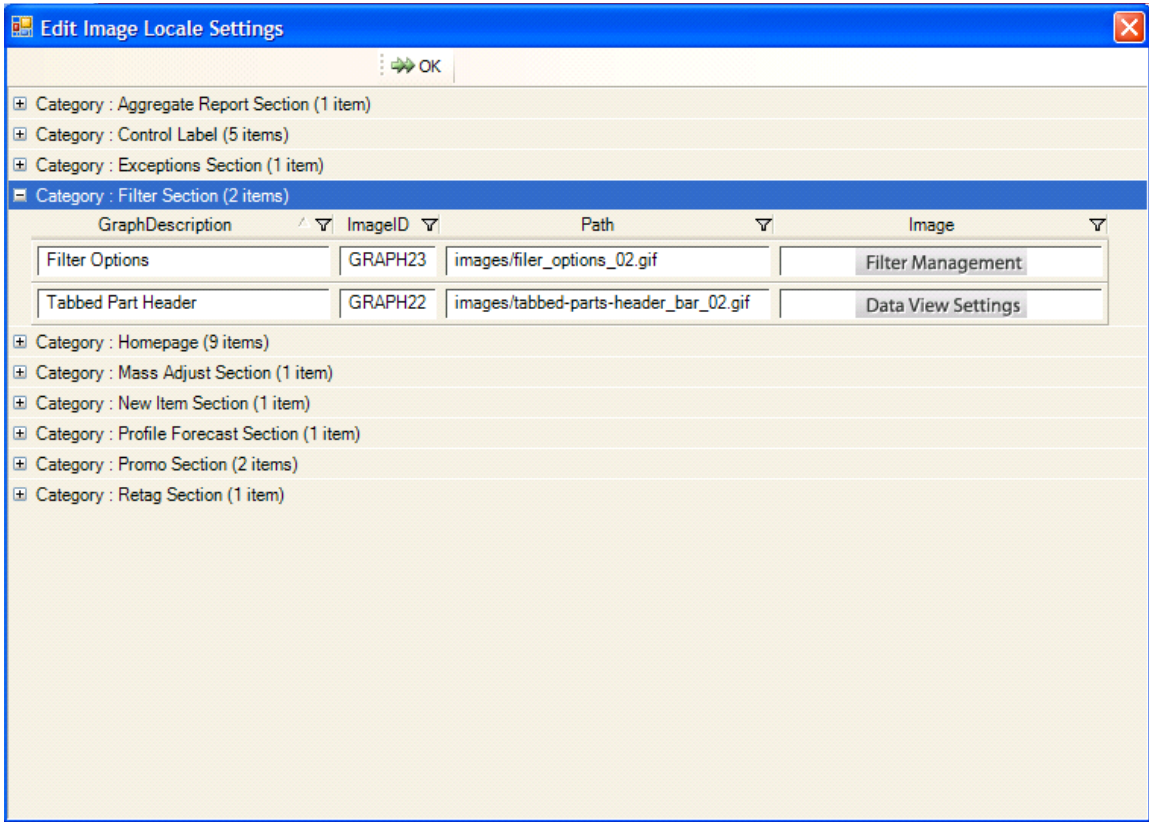
1. Click the Images button in the Edit column of the language you would like to translate to English.

The Edit Image Locale Settings window displays.



2. Click on the + to view a specific Category.

The Category expands.



3. Edit the images as necessary.

The table below details what each text box means.

Description	
GraphDescription	Description of the image.
ImageID	Unique ID number assigned to the image.
Path	Name of the image file.
Image	Preview of the image.

4. The images are then saved in the following folder:

c:\inetpub\wwwroot\planningportal\images

5. Thereafter, you can add them in the Path text box.

A preview of the updated image automatically displays in the Image text box.

**Note:** *All Planning Portal applications must be closed when saving. Saving changes in the PP Admin Tool does not always refresh immediately in the Planning Portal. Please restart the Internet Information Server in order to ensure changes take effect.*

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## Chapter 4      **Advanced Configurations**

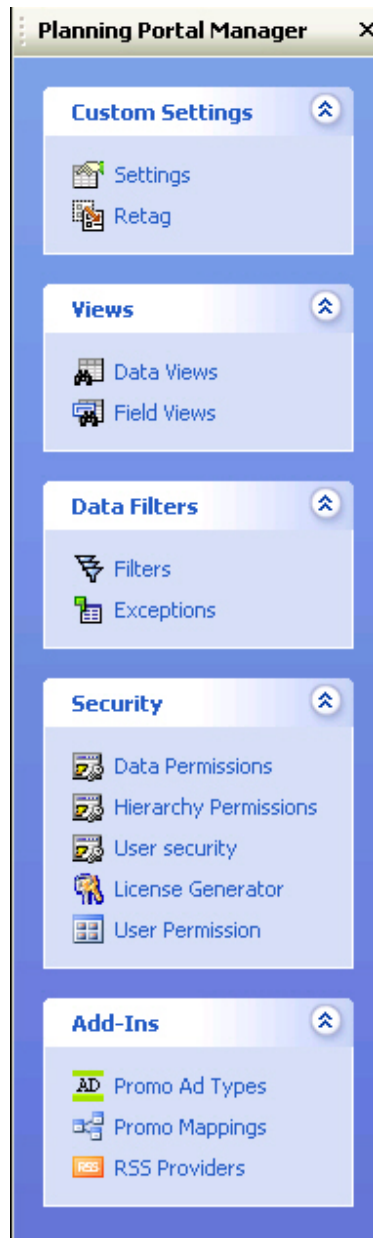
### **This chapter includes:**

Section 1: Overview .....	83
Section 2: Custom Settings.....	84
Section 3: Views .....	89
Section 4: Data Filters.....	101
Section 5: Security .....	103
Section 6: Add-Ins.....	107

### **Section 1: Overview**

The Planning Portal Manager is located on the left-hand pane in the Planning Portal Admin Tool. The features listed in the PP Manager are used to configure users' settings, Data Views, Filter Views, Data Filters, Security access, and additional links. The sections in this chapter detail each feature, as well as how to configure each user's access/privileges of the Planning Portal.

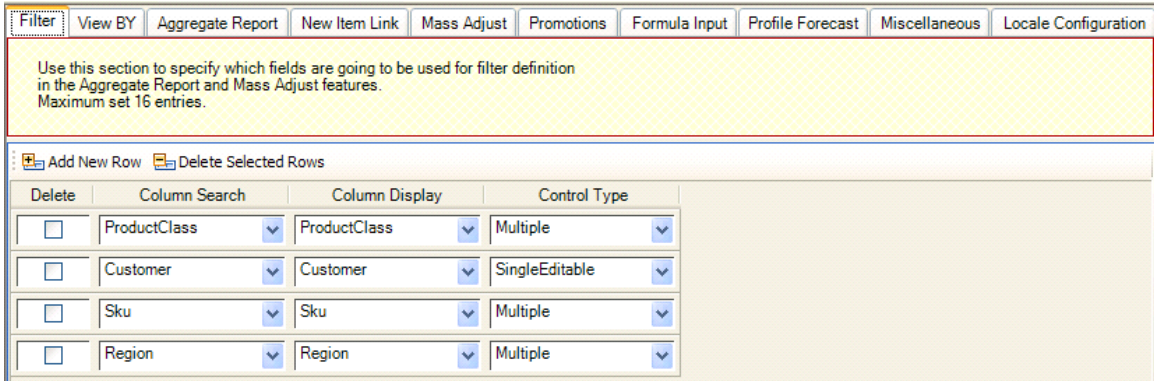
The depiction below is the Planning Portal Manager of the PP Admin Tool.



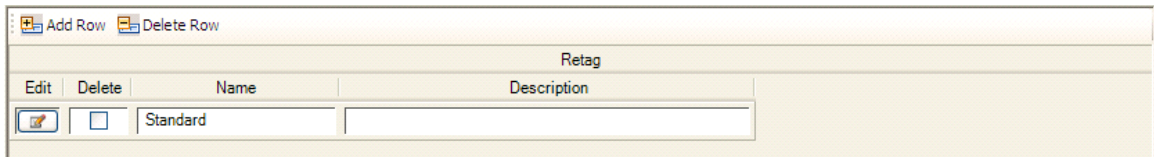
## Section 2: Custom Settings

### 2-1: Settings

The Settings feature enables you to configure the Planning Portal for users by accessing the tabs at the top of the window. The depiction below is an example of the Filter feature when clicking on Settings.




## 2-2: Retag



The table below details the types of configurations that can be used:

Configuration	Description
Name	Name of Retag configuration used.
Description	Defines the Retag configuration used.

### 2-2-1: To Add a Row

1. Click on the  icon.

A new row displays at the bottom of the list.

**2-2-2: To Delete a Row**

1. Click on the Delete checkbox next to the filter and click on the



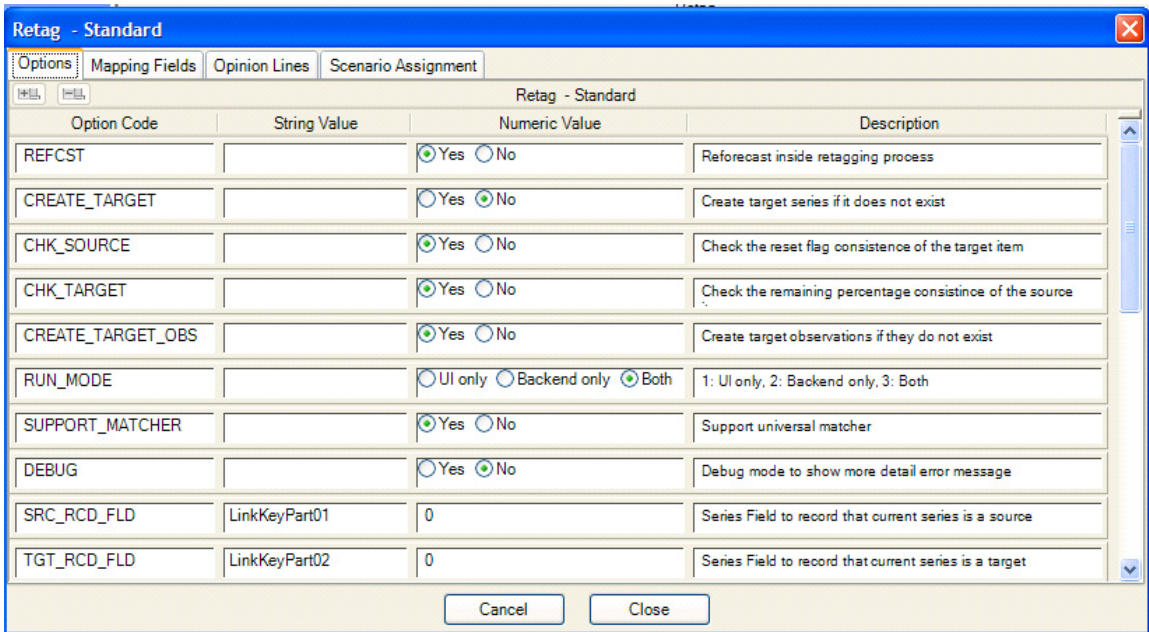
icon.

The row is then deleted from the list.

**2-2-3: To Edit a Row**

1. Click on the  icon.

The edit window displays with the Options tab active.



2. Make edits as necessary. The tables below detail what each tab's information means.

Table 4-1: Options tab

Option Code	Description
REFCST	Reforecast inside the retagging procedure.
CREATE_TARG ET	Create a target series if one is non-existent.
CHK_SOURCE	Check the reset flag consistency of the target item.
CHK_TARGET	Check the remaining percentage consistency of the source.
CREATE_TARG ET_OBS	Create target observations if non-existent.
RUN_MODE	Three options: <ul style="list-style-type: none"> <li>■ UI only - User Interface</li> <li>■ Backend only - Backend</li> <li>■ Both - User Interface and Backend</li> </ul>
SUPPORT_MAT CHER	Support universal matcher.
DEBUG	Provides a more detailed error message.
SRC_RCD_FLD	Series field to record that the current series is a source.
TGT_RCD_FLD	Series field to record that the current series is a target.

Table 4-2: Mapping Fields

Column	Description
Retag Field	Uneditable. QAD Inc. use only.
Engine Field	Attributes linked.


Table 4-2: Mapping Fields

Column	Description
Used	Select if used in Retagging.
Source Field	Reference purposes, if necessary.
Note	Additional notes, if necessary.

Table 4-3: Opinion Lines

Column	Description
OL Name	References label name.
Engine Field	Opinion Line
BK Engine Field	Backup field for Retagging where data is saved.
Hist Future	What Retagging affects: <ul style="list-style-type: none"> <li>■ Historic</li> <li>■ Future</li> <li>■ Both (historic and future)</li> </ul>
Note	Additional notes, if necessary.

3. Under the Scenario Assignment tab, select which scenarios are to

use this retag by clicking on the  icon.

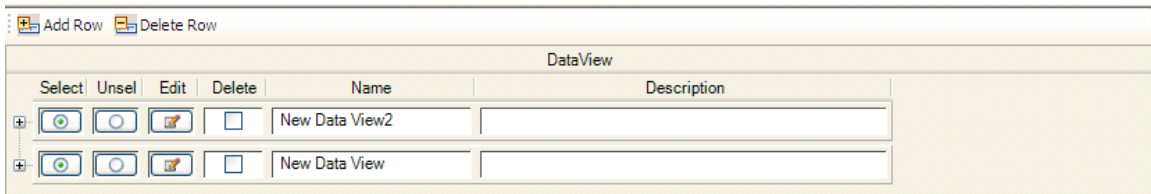
Alternatively, click on the  icon to remove the scenario.

4. Click Close when finished.

## Section 3: Views


### 3-1: Data Views

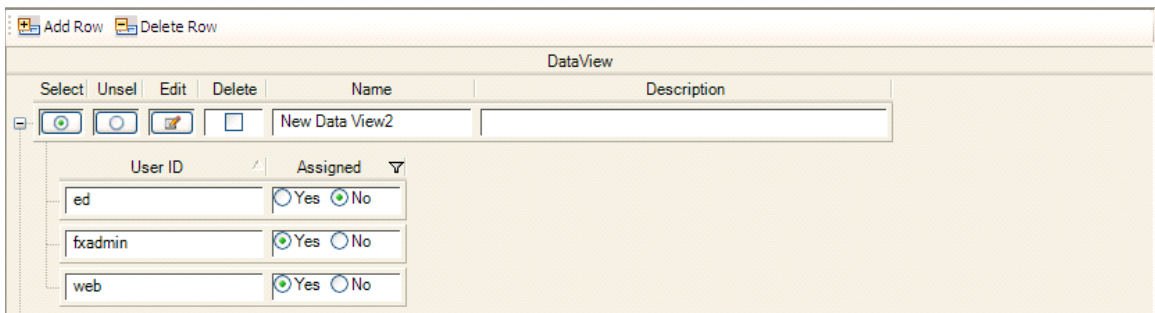
The Data Views feature defines which Opinion Lines are shown in which year. Also determines if they can be edited or Read-Only, as well as which views available.




The table below details the types of configurations that can be used:

Configuration	Description
Name	Determines the name of the configured View.
Description	Defines View configuration.

You can expand the Data View row to edit users' information by clicking on the  icon. Each user has a User ID.




### 3-1-1: To Add a Row

1. Click on the  icon.


A new row displays at the bottom of the list.

### 3-1-2: To Delete a Row

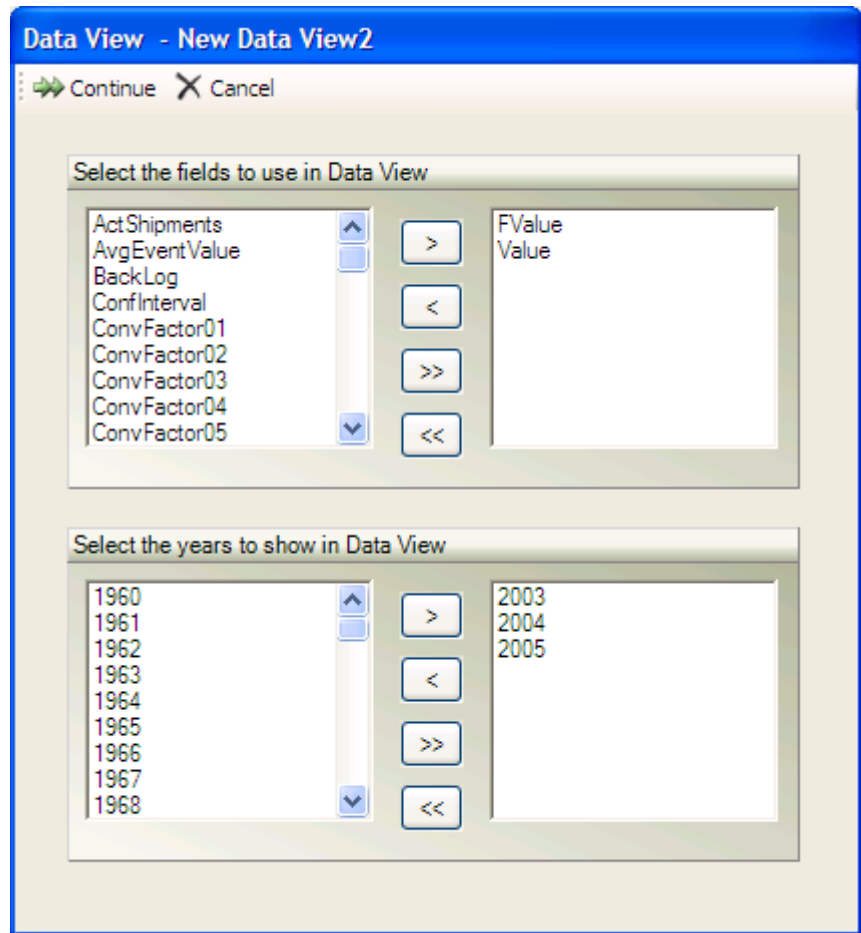
1. Click on the Delete checkbox next to the filter and click on the  icon.

The row is then deleted from the list.

### 3-1-3: To Edit a Row

1. Click on the  icon.

The selected Data View window displays.






2. Select the fields to be used in Data View and click on the  arrow.

To remove fields to be used in Data View, click on the  arrow. To

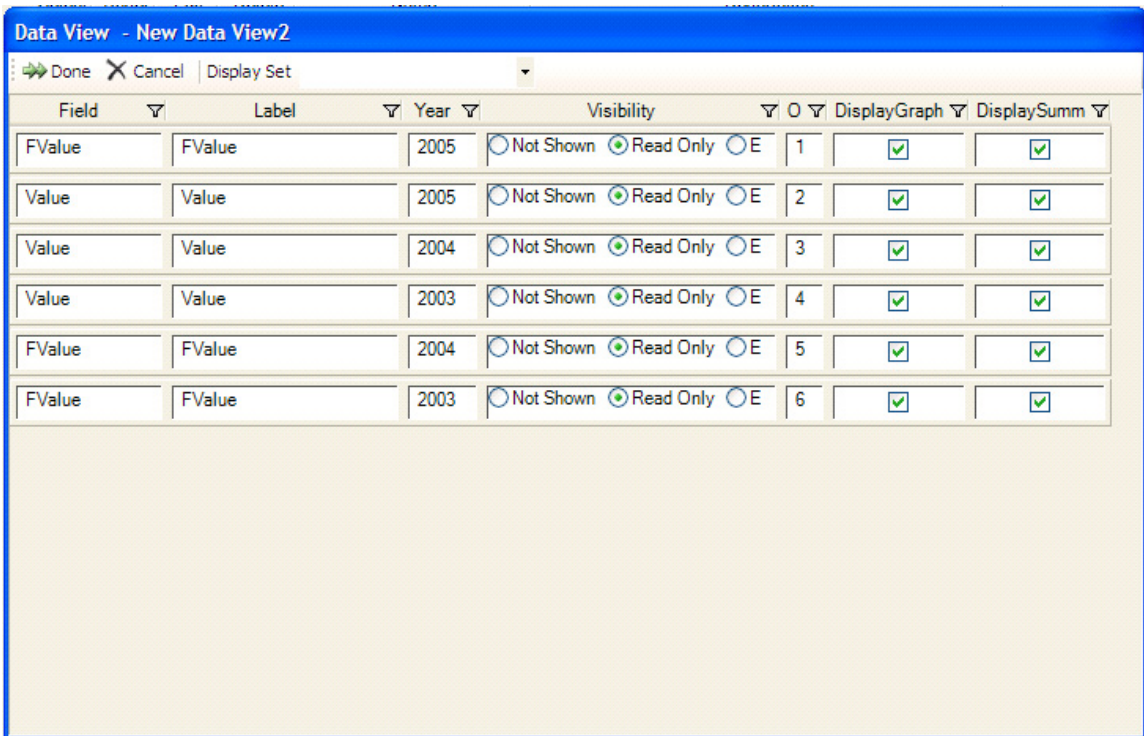
select all fields from the list, click on the  or  arrows.

3. Select the years to be displayed in Data View and click on the arrow.

4. To remove the years to be used in Data View, click on the  arrow. To select all years from the list, click on the  or  arrows.

5. Click the  icon.

The Data View window is displayed.

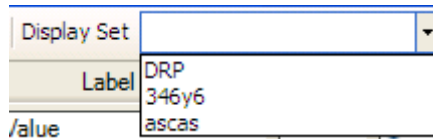


6. Edit as necessary. The table below details each column.

Column	Description
Field	Opinion Line that is selected.

Column	Description
Label	Description of Opinion Line. Changes to reflect display set aliases if a display set is selected.
Visibility	Determines if the display line is shown, Read-Only, or editable.
Order	Determines in what order the Opinion Lines display.
DisplayGraph	Determines if the Opinion Line displays in Graph View.
DisplaySummary	Determines if the Opinion Line displays in Summary View.

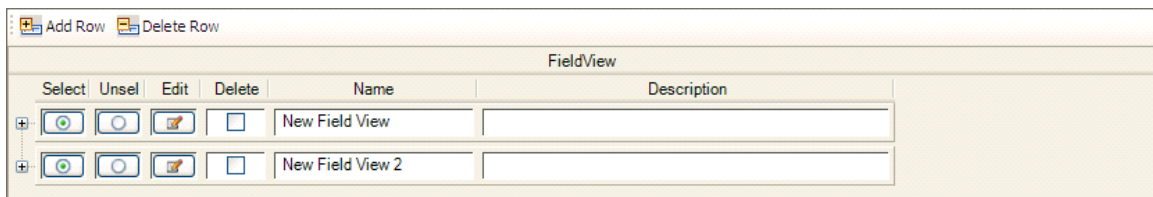
- Click the Change button next to the Display Set and select which Display Set to use. When applied, it uses the predetermined aliases as labels in the Data View.



- Click Done when finished.

### 3-2: Field Views

The Field Views feature defines which attributes display in different views. It is also where it is determined if they are editable, Read-Only, as well as in which views available.



The table below details the types of configurations that can be used:


Configuration	Description
Name	Determines which field is used in the Field View.
Description	Defines the field used.

You can expand the Field View row to edit users' information by clicking

on the  icon. Each user has a User ID.



### 3-2-1: To Add a Row

1. Click on the  icon.

A new row displays at the bottom of the list.


### 3-2-2: To Delete a Row

1. Click on the Delete checkbox next to the filter and click on the

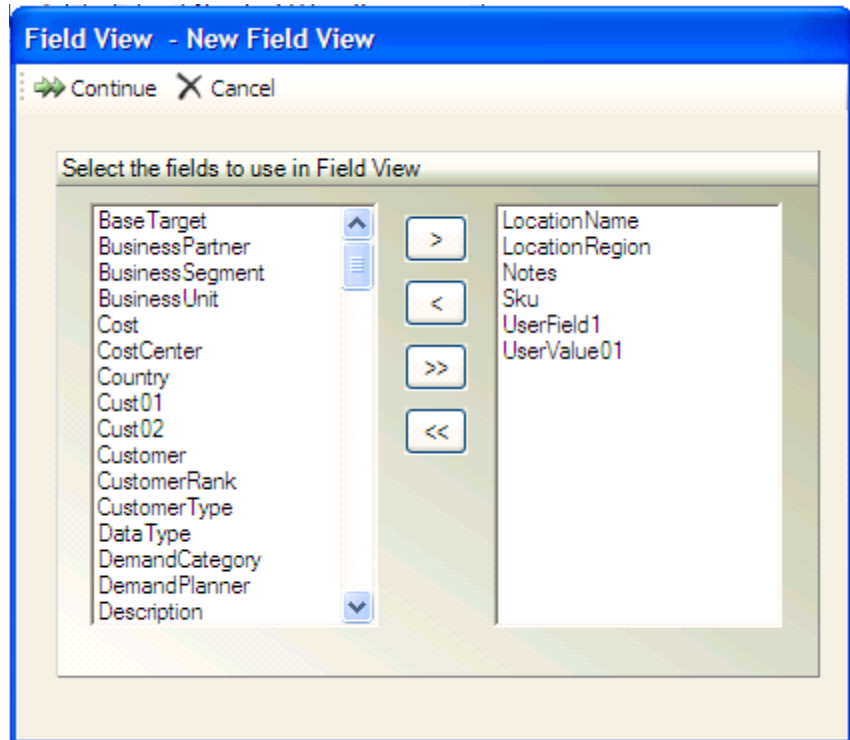
 icon.


The row is then deleted from the list.

**3-2-3: To Edit a Row**



1. Click on the  icon.

The selected Field View window displays.



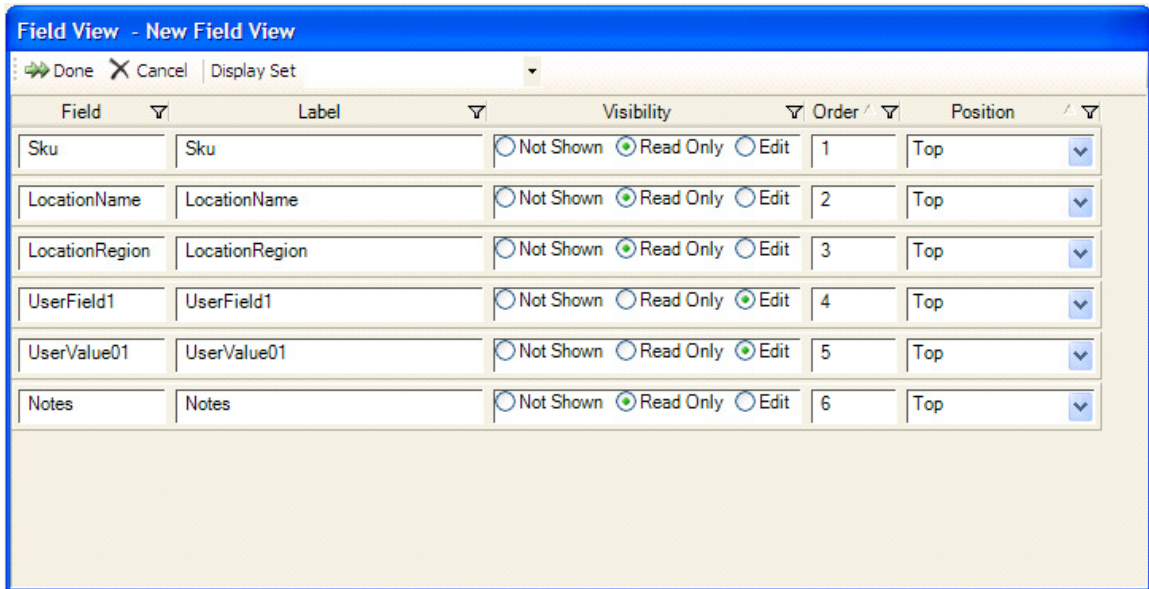
2. Select the fields to be used in Field View and click on the  arrow.

To remove fields to be used in Field View, click on the  arrow. To

select all fields from the list, click on the  or  arrows.

3. Click the  icon.

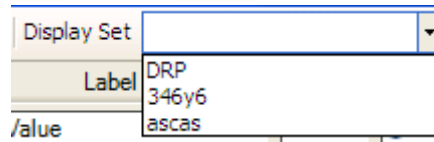
The Field View window displays.



4. Edit as necessary. The table below details each column.

	Description
Field	Attribute that is selected.
Label	Description of Attribute. Changes to reflect display set aliases if a display set is selected.
Visibility	Determines if the attribute is shown, Read-Only, or editable.
Order	Determines in what order the attributes display.
Position	Applies to Classic View. Determines where the attribute is displayed in relation to the data.

5. Click the Change button next to the Display Set and select which Display Set to use. When applied, it uses the predetermined aliases as labels in the Data View.



6. Click Done when finished.

**Note:** *The PP Admin Tool enables configuring the position of Field Views to the top, left, right and bottom. However, in Detail View, the Field View displays at the top only.*

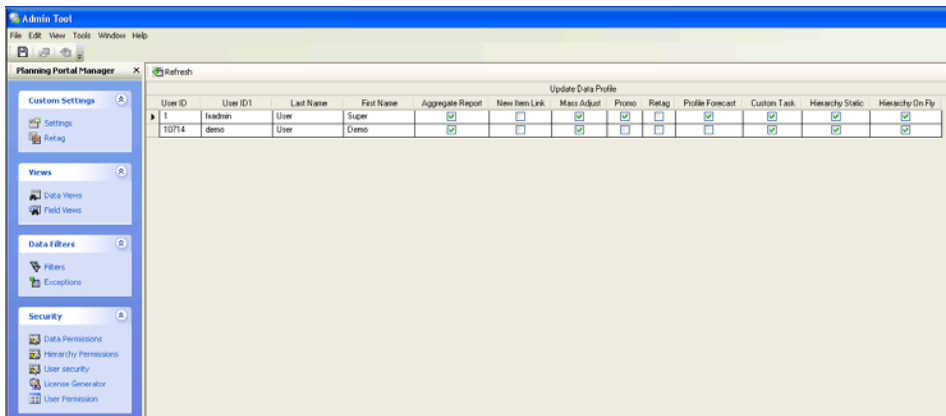
## 3-2: Hierarchy Management

Hierarchy Management allows users to apply hierarchies created within the Demand Management Engine to various levels in their Detail view within the Planning Portal. Hierarchies available will be either the static hierarchy currently applied in the Demand Management or must be created by selecting On Fly.

### 3-2-1: User Permissions

All users who wish to utilize hierarchies within the Planning Portal, MUST have been granted the appropriate User Permissions within their User Profile in the Planning Portal Admin Tool. In most cases, this will only be updated by the Demand Management System Administrator.

To assign hierarchy permissions, log into the Admin Tool, select user permissions from the menu on the right and select whether On Fly and/or Static hierarchy usage is allowed for the User ID.



### Setting Hierarchy User Permissions

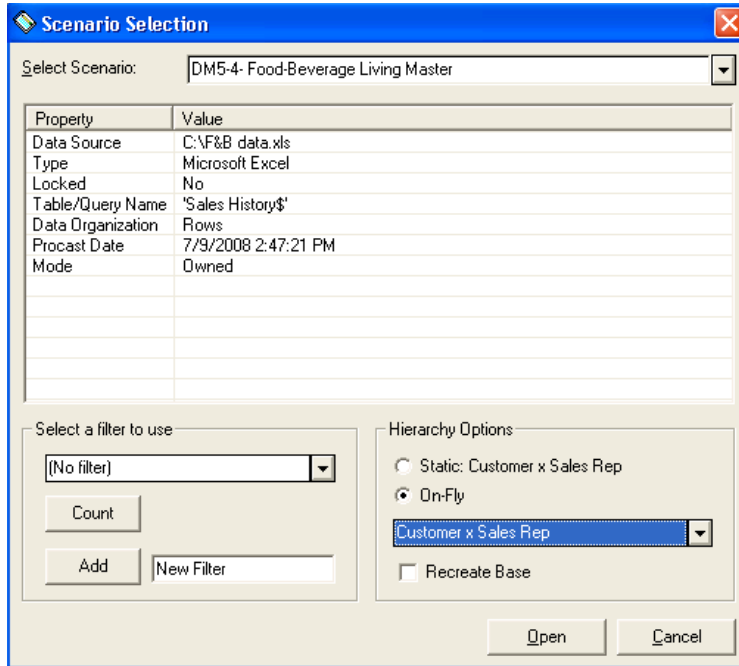
### 3-2-3: On Fly Hierarchies

The Hierarchies that will be available in the list to assign to users are hierarchies that have already been applied to Living Master Scenarios with the On Fly option by the owner, generally fxadmin. The Living Master scenario must also be a scenario that is available in the Planning Portal.

#### 3-2-3-1: Assigning On Fly Hierarchy Permissions

The first step in making an on fly hierarchy available for use within the Planning Portal is to have it available as On Fly within the Demand Management Engine.

Log into the Demand Management and choose the related Living Master. Before Opening, choose the On Fly radio button and use the down arrow below to select the hierarchy which you wish to make available as On Fly in the Planning Portal. Open the scenario.

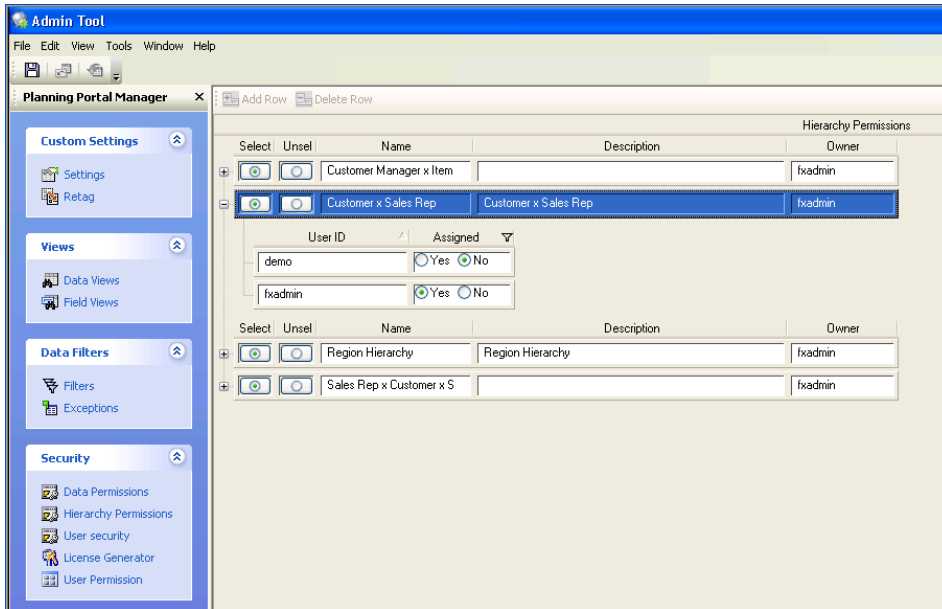


### Choosing On Fly Hierarchy at Log In

Once the hierarchy has been identified as On Fly within the Demand Management Engine, it will now appear in the Planning Portal Admin Tool as available to assign permissions. Appropriate security is required to assign hierarchies. In most cases this will be your designated system administrator.

- ▲ Users must have correct permissions
- ▲ Permissions are configured in security

Must have the “Hierarchy On Fly” option enabled



### Hierarchy Permissions

To assign a hierarchy to a user, expand the hierarchy using the '+' sign and select "Yes" next to the User IDs you want to tie to each hierarchy.

### 3-3: Custom Tasks

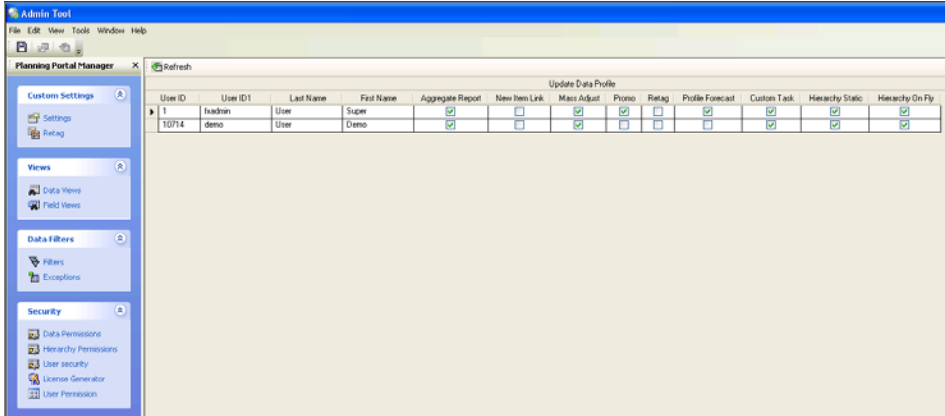
Custom tasks automate standardized processes, can perform customized calculations, and generate new data series. Traditionally, this capability had only existed in the Demand Management Engine. Custom Task can now be handled within the Planning Portal. Users have the ability to:

- Execute Custom Tasks defined in the Demand Management Engine
- Define the values in the arguments used in each Custom Task

#### 3-3-1: User Permissions

All users who wish to utilize custom tasks within the Planning Portal, MUST have been granted the appropriate User Permissions within their User Profile in the Planning Portal Admin Tool. In most cases, this will only be updated by the Demand Management System Administrator.

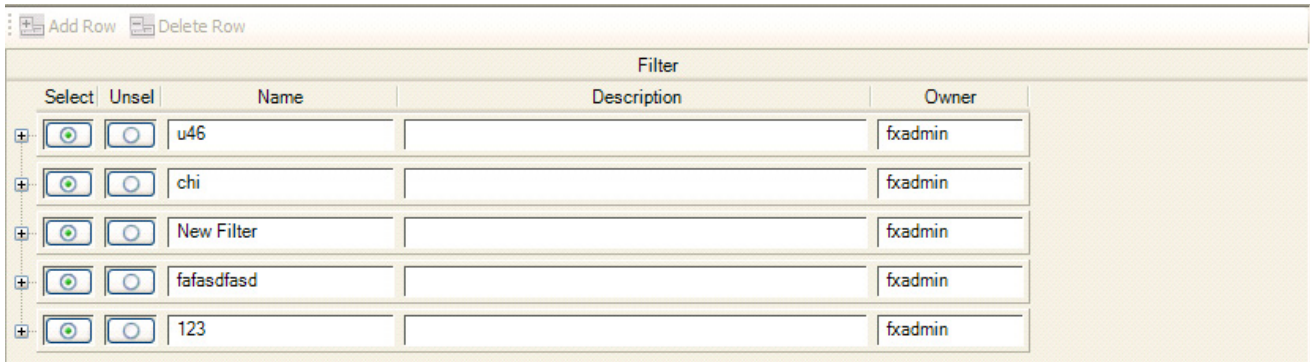
To assign custom task permissions, log into the Admin Tool, select user permissions from the menu on the right and select whether On Fly and/or Static hierarchy usage is allowed for the User ID.



## Section 4: Data Filters

### 4-1: Filters

The Filters feature enables you to limit the displayed series with attributes that meet a defined criteria.



You can expand the Filter row to edit users' information by clicking on the icon. Each user has a User ID.

The table below details the types of configurations that can be used:

Configuration	Description
Name	Determines the filter used in the data.
Description	Defines the filter used.
Owner	Defines the user who owns the filter.

You can expand the Filter row to edit users' information. Each user has a User ID.

Select	Unsel	Name	Description	Owner
<input checked="" type="radio"/>	<input type="radio"/>	u46		fxadmin

User ID	Assigned
ed	<input type="radio"/> Yes <input checked="" type="radio"/> No
fxadmin	<input checked="" type="radio"/> Yes <input type="radio"/> No
web	<input type="radio"/> Yes <input checked="" type="radio"/> No

## 4-2: Exceptions

The Exceptions feature enables you to limit displayed series and to select series with observational data that meet a defined criteria. You must add Exceptions from the Viewer for users to be able to run Exceptions.

Select	Unsel	Name	Description	Owner
<input checked="" type="radio"/>	<input type="radio"/>	uh		fxadmin
<input checked="" type="radio"/>	<input type="radio"/>	ab		fxadmin
<input checked="" type="radio"/>	<input type="radio"/>	try me		fxadmin

The table below details the types of configurations that can be used:

Configuration	Description
Name	Determines the name of the Exception used.
Description	Defines the Exception.
Owner	Owner of this Exception.

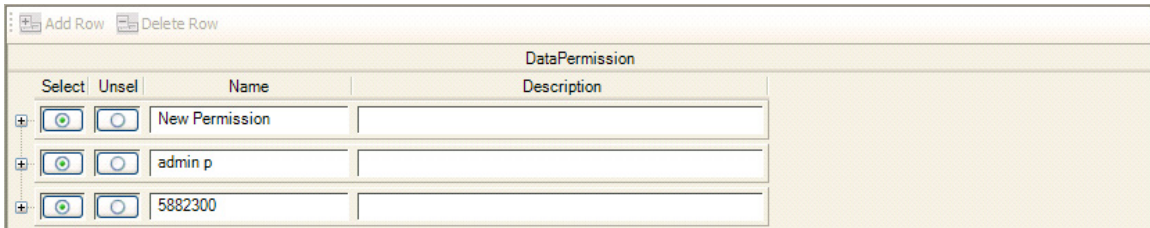
You can expand the Exception row to edit users' information. Each user has a User ID.

The screenshot shows a web application interface for configuring an Exception. At the top, there are buttons for 'Add Row' and 'Delete Row'. Below that is a table titled 'Exception' with columns for 'Name', 'Description', and 'Owner'. A row is selected with 'uh' in the Name field and 'fxadmin' in the Owner field. Below the table, there is an expanded view of the 'Assigned' users, showing a list of 'User ID' and 'Assigned' (Yes/No) for users 'ed', 'fxadmin', and 'web'. The 'fxadmin' user is selected.

## Section 5: Security

### 5-1: Data Permissions

The Data Permissions feature grants specific privileges to users who are related to a specific scenario or fields within a scenario.

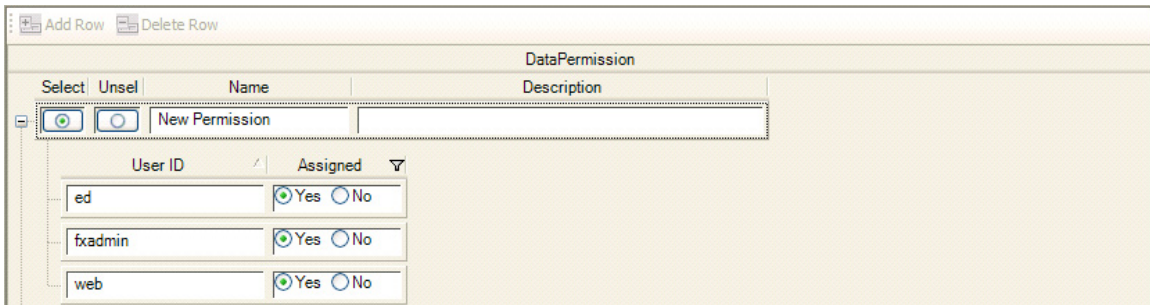


The table below details the types of configurations that can be used:

Configuration	Description
Name	Name of Data Permission selected.
Description	Description of selected Data Permission.

**Note:** *A user can be assigned to one Data Permission only. If another Data Permission is assigned to a user, then the previous Data Permission is removed from that user.*

You can expand the Data Permission row to edit the information. Each user has a User ID.



**Note:** *It is highly recommended to specify which scenarios are visible. This is done in the Permission Definition in the DME Viewer.*

## 5-2: User Security

The User Security feature enables you to determine each user's User Name for both logging into the Planning Portal and Windows.

PPUser	
User Name	NT Account
ed	
fxadmin	
web	

The table below details the types of configurations that can be used:

Configuration	Description
User Name	User's Username for logging into Planning Portal.
NT Account	User's Username for logging into Windows.

## 5-3: License Generator

The License Generator generates a random serial number for the Planning Portal after you complete the installation. You must contact QAD Support for a valid License. Please see [See "Planning Portal License" on page 39.](#) for additional information.

Serial Number: 36 61 118 95 89 66 73 62 82 82 59 68 50 59 70 118 75 76

Licence: 5 22 23 79 99 115 126 114 20 105 105 9 110 1 4 108 68 120 102 6 24 23 75 102 115  
126 113 20 96 106 17 118 10 17 121 69 97 112 8 14 2 76 117 102 113 99 3 104 120 0  
127 0 17 123 73 97 113 6@86 70 69 18 57 52

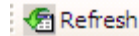
## 5-4: User Permission

Update Data Profile									
User ID	User Name	Last Name	First Name	Aggregate Report	New Item Link	Mass Adjust	Promo	Retag	Profile Forecast
1	fxadmin	User	Super	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1884	web	user	web	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4543	ed	fred	ed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The table below details to which features the user has privileges, as well as user information:

Configuration	Description
User ID	Provides the user ID for the particular user.
User Name	Provides the user's name when logging into the Planning Portal.
Last Name	Displays the user's last name.
First Name	Displays the user's first name.
Aggregate Report	Determines whether or not the user has Aggregate Report feature privileges.
New Item Link	Determines whether or not the user has New Item Link feature privileges.
Mass Adjust	Determines whether or not the user has Mass Adjust feature privileges.
Promo	Determines whether or not the user has Promotions feature privileges.
Retag	Determines whether or not the user has Retag feature privileges.
Profile Forecast	Determines whether or not the user has Profile Forecast feature privileges.

After you edited the user permission information, click on the

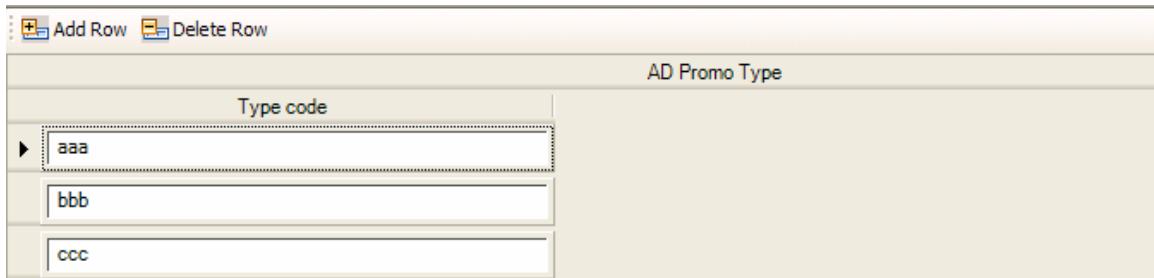


icon to undo any changes.


## Section 6: Add-Ins

### 6-1: Promo Ad Types

The Promo Ad Types feature is used to advertise for Promotions. In the Type code text box, you can type in up to 10 characters.




#### 6-1-1: To Add a Row

1. Click on the  icon.

A new row displays at the bottom of the list.

#### 6-1-2: To Delete a Row

1. Click on the Type code text box and click on the  icon.

The row is then deleted from the list.

### 6-2: Promo Mappings

The Promo Mappings feature is used to map Promotions to the database.

Promo Mappings		
Field Name	Source Field	Source Table
CD_SKU_CD	Sku	Series
QY_WK_FCT_BASELINE_DMD	Original	Observations
QY_WK_ACT_BASELINE_DMD	Value	Observations
AMT_FCT_PRICE	Price	Series
AMT_FCT_DISCOUNT_PRICE	Price	Series
AMT_FCT_NET_PRICE	Price	Series
SKU_DESCRIPTION	ProductName	Series
KY_CUSTOMER_CD	Customer	Series
COMMIT1		N/A
COMMIT2		N/A
DAYS_IN_CYCLE	1	N/A
KEY_FIELD1	Customer	Series
KEY_FIELD2	LocationRegion	Series
KEY_FIELD3		
LINK_FIELD	UserField3	Series

The table below details what each Field Name means. These field names are configured by your System Administrator.

Field Name	Description
CD_SKU_CD	Holds item information. Provides mapping between Promotions and the QAD Demand Management applications.
QY_WK_FCT_B ASELINE_DMD	Determines which field you retrieve your forecast demand.
QY_WK_AMT_B ASELINE_DMD	Determines which field you retrieve your actual demand.
AMT_FCT_PRIC E	Determines which field you retrieve your forecast price.

Field Name	Description
AMT_FCT_DISC OUNT_PRICE	Determines which field provides your forecasted discount price.
AMT_FCT_NET _PRICE	Determines which field provides your forecasted net price.
SKU_DESCRIP TION	Defintion of the Sku.
KY_CUSTOME R_CD	Customer ID.
COMMIT1	Determines if price is increased by number of units.
COMMIT2	Determines if price is increased by amount of unit.
DAYS_IN_CYCL E	Determines the days in a cycle.
KEY_FIELD1	Provides additional information to make a series unique. (i.e., there may be more than one series.)
KEY_FIELD2	Provides additional information to make a series unique. (i.e., there may be more than one series.)
KEY_FIELD3	Provides additional information to make a series unique. (i.e., there may be more than one series.)
LINK_FIELD	Provides the link between series table and Promotions table.

### 6-3: RSS Providers


The RSS Providers feature enables you to configure the PP by linking external web sites to the Home page.

RSS Feed Add-Ins	
Name	FeedsURL
▶ Devices & Diagnostics	http://www.fdanews.com/rss/feed?rssId=11
Food & Drug	http://www.fdanews.com/rss/feed?rssId=17
eWeek	http://rssnewsapps.ziffdavis.com/tech.xml

The table below details the types of configurations that can be used:

Configuration	Description
Name	Provides the name of the URL to which the RSS Viewer is linked.
Feeds URL	Provides the URL address for the website that is linked to the RSS Provider.

### 6-3-1: To Add a Row

1. Click on the  icon.

A new row displays at the bottom of the list.

### 6-3-2: To Delete a Row

1. Click on the Delete checkbox next to the filter and click on the



icon.

The row is then deleted from the list.

# Index

---

## Symbols

.NET 2.0 41

---

## A

Acronyms and Abbreviations 10  
Add-Ins 107  
Admin Tool 55  
Aggregate Report 56, 106  
attributes 93

---

## B

Base Unit 9  
Base Unit/ Viewer 70

---

## C

Classic View 96  
Client Computers 20  
Client Machine 17  
Connect Timeout 72  
CurrencyDriven 74  
Custom Settings 84  
CustomTaskOnUpdate 75

---

## D

Data Filters 83, 101  
Data Permission 104  
Data Permissions 103

---

Data Source 71  
Data Views 83, 89  
Database 72  
Database Connection 71  
Database Server 16  
Decimal Pt 73  
Demand Management Engine 7, 10  
DisplayGraph 93  
DisplaySummary 93  
Documentation Conventions 9

---

## E

Edit 76  
Excel 2003 Primary Interop Assembly (PIA)  
46  
Exception 103  
Exceptions 7, 102

---

## F

Field 92, 96  
Field View 95, 96  
Field Views 93  
Filter 56, 57, 102  
Filter Views 83  
Filters 101  
Formula Editor 69  
Formula Input 56, 67  
FrozenColumnCount 75

---

---

**G**

Grid Promo Items 65

---

**I**

Installation Process 26  
Intellectual Property 10  
Internet Information Services 10, 41  
Inventory Management 8  
Inventory Management Tool 10  
IsoCode 76  
Item 66

---

**L**

Label 93, 96  
Language Code 76  
Language Name 76  
License Generator 105  
Locale Configuration 75  
LockedPeriodOff 75  
Logging In 8  
Logging Out 9  
LogoHomePagePath 75

---

---

**M**

Mass Adjust 56, 64, 106  
Microsoft.Office.Interop.Excel 75  
Miscellaneous 56, 71

---

**N**

New Item Creation 62  
New Item Link 56, 62, 106  
NoViewByIn 74  
NT Account 105

---

**O**

Opinion 60  
Opinion Line 10, 93  
Opinion Lines 60, 64, 89  
Order 93, 96  
Others 73

---

**P**

Password 71  
Planning 83  
Planning Portal 7, 14  
Planning Portal Admin Tool 83  
Planning Portal Authentication 44  
Planning Portal Database components 31, 32  
Planning Portal Highlights 8  
Planning Portal Manager 56, 83  
Planning Portal's Physical Directory 42  
Pooling 72

---

Position 96  
PPSetup.exe 26, 43  
Profile Forecast 56, 70, 106  
Promo 106  
Promo Ad Types 107  
Promo Mappings 108  
Promo Search By 65  
Promotions 56, 65

---

## R

Rebalance 74  
Report Level 59  
required hardware 15  
Retag 85, 106  
Round Mode 72  
RSS Providers 110

## S

---

SCDateField 74  
Scenario Assignment 88  
Screen Captures 10  
SCUserField 74  
Security 103  
Security access 83  
Software License 10  
Software Media 16  
StoreChangeInfo 74

## U

---

User ID 71, 106  
User Name 106  
User Permission 105  
User Security 105

## V

---

View By 56, 58  
Visibility 93, 96

## W

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Web Server 17  
Windows Integrated Authentication 44

