Installation and Administration Guide
QAD Planning Portal

78-0929A
QAD Demand Management Engine v5.5
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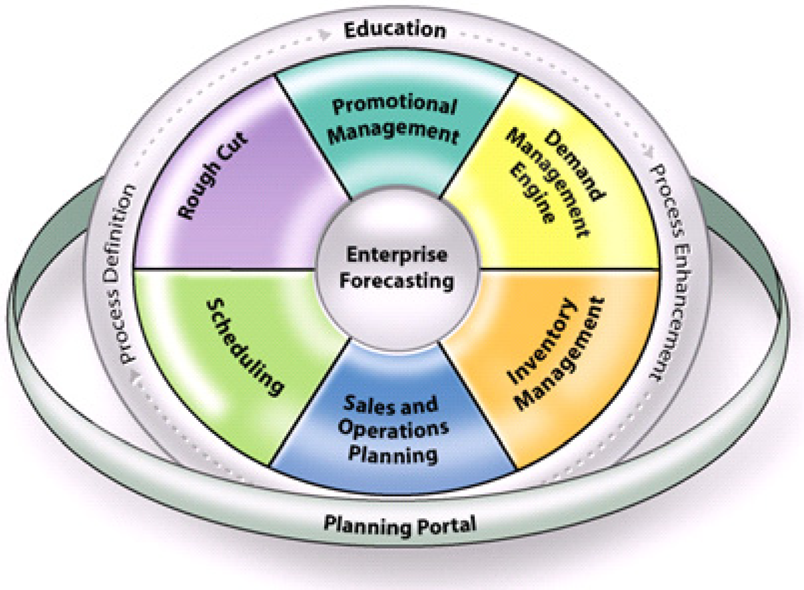
Chapter 1 Introduction

This chapter includes:

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.

The figure below is a depiction of the Atlas Planning Suite. The Planning Portal encompasses the products of the suite.



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 cession)
- Add or Edit Notes

1-2: Logging In

To access the Planning Portal Admin Tool, go to:

Start > Programs > JGS - Atlas Planning Suite > Planning Portal > Planning Portal Admin Tool

You must have a username and password to log into the tool.

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

Table 1-1: Default Username and Password

Log In	Password
Username	fxadmin
Password	fxadmin

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

1-3: Logging Out

If you would like to log out of the application, just close the application and remember that if you got a message to restart IIS you will need to restart IIS (Internet Information Services) before those changes come into effect.

Section 2: Documentation Conventions

2-1: Text

The following table lists text conventions in this user guide.

Table 1-2: 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**.

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

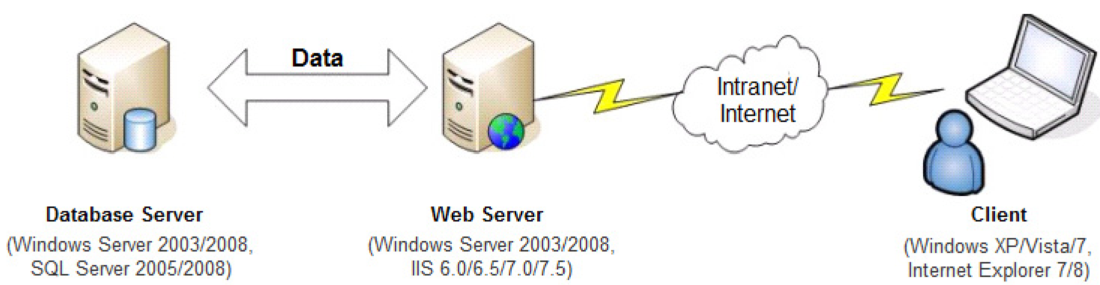
Chapter 2 Installation

This chapter includes:

Section 1: Overview

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

The following chart shows the architecture of the Planning Portal and the software requirements.



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 where the Planning Portal was installed. Since the Admin Tool changes the settings defined in web.config file (Planning Portal configuration file), this needs to be executed locally in the Web Server where the PP is installed.*

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 2003 or 2008 Server. The most current Service Packs are highly recommended.
- SQL Server 2005 or 2008 (the most current service packs are highly recommended). If SQL Server is not installed, the Demand Management Engine provides the option to install SQL Express Edition instead.

2-2-2: Web Server

- Windows 2003/2008 Server. The most current Service Packs are highly recommended.
- IIS 6.0 or greater
- .NET Framework 3.5 (with SP1)
- .NET Framework 2.0 (with SP2)
- ADO 2.8
- Installer 3.5 (SP1)
- Microsoft Excel Primary Interop Assembly (PIA). Must match Office version.

2-2-3: Client Machine

- Windows XP/Windows Vista
- Office 2003/2007/2010 (if you want to export to Excel)
- Internet Explorer 7.0/Internet Explorer 8.0.

Note: *You can download and install .NET 2.0, ADO 2.8, and Installer 3.1 from www.microsoft.com.*

Section 3: Prerequisites

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

- IIS 7.0 or greater
- Windows Installer 3.5 SP1
- Microsoft .NET Framework 3.5 SP1
- Microsoft .NET Framework 2.0 SP2
- Internet Explorer 7 / Internet Explorer 8 (with compatibility mode enabled)

Note: *If IIS is not on the Web Server, but .NET Framework 2.0 already is, you must 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"
```

For a 64-bit version operating system:

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

```
C:\Windows\Microsoft.NET\Framework64\v2.0.50727\
```

- Run the following command:

```
"C:\Windows\Microsoft.NET\Framework64\v2.0.50727\>aspnet_regiis -i"
```

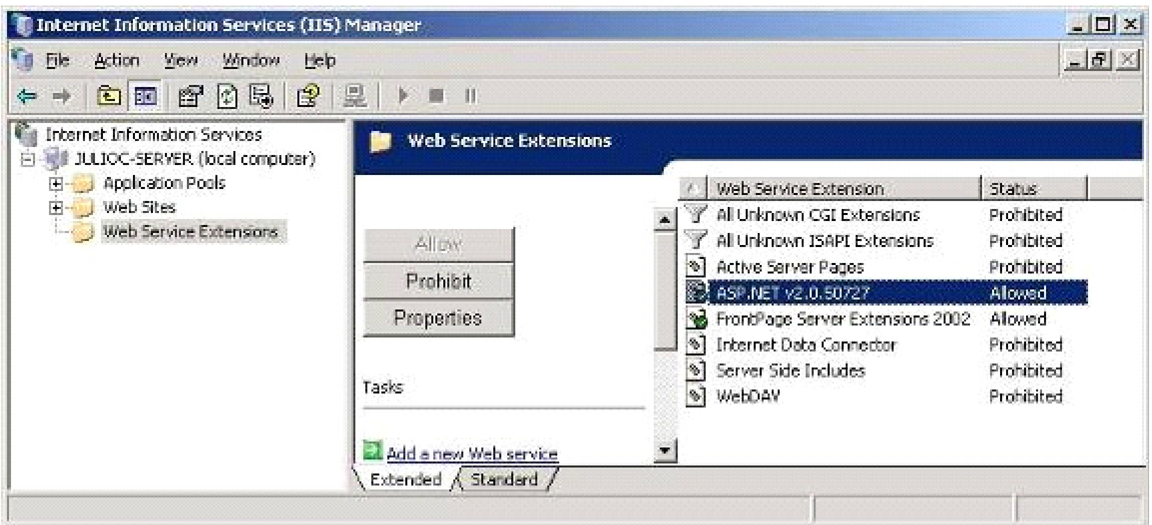
3-1: Microsoft .NET Framework 2.0 (Service Pack 1)

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 select “Allow in the window”.

4. Close the window when finished.

3-2: Configure a JSE as MIME Type

To 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 the **MIME Types** button.
5. Click **New** to add entry.
6. Enter ".jse" in the extension textbox (no quotes).
7. Enter "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 changes.

3-3: Client Computers

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

- Microsoft Internet Explorer 7.0 or Internet Explorer 8.0.
- Macromedia Flash plug-in for Internet Explorer.

3-4: Other Prerequisites

To upgrade the PP database you need the system administrator (sa) account password for the SQL instance being upgraded.

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

This section describes upgrading the PP to a newer version. and the necessary steps to do this.

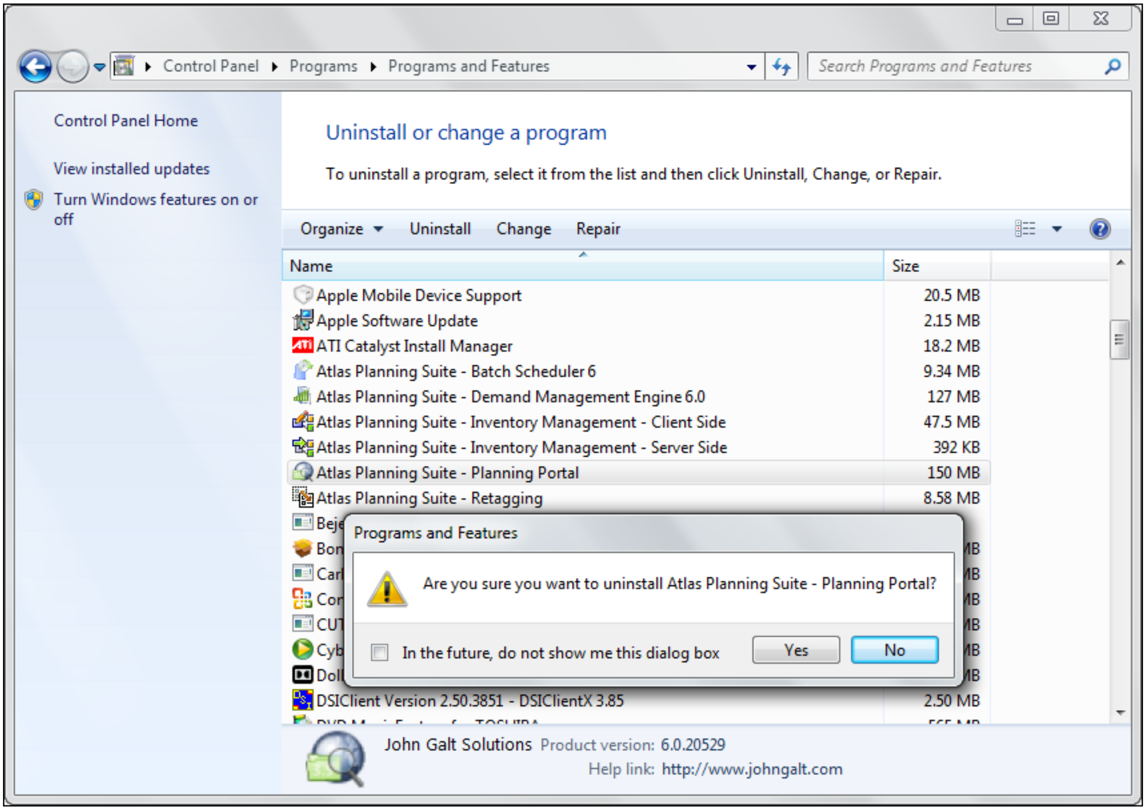
Note: *If you plan on upgrading the PP but keeping all your existing configurations, you need to make sure to save the following files: web.config, CustomSettings.xml and Locale.xml. These files are located in the folder where the PP was installed. This version of the PP can upgrade configurations files from version 3.6.04.26 and higher only; backup the current data and settings if you try to move to this version from any version lower than the mentioned above.*

1. Remove the current version of the Planning Portal.

   Start > Control Panel > Add/Remove Programs.

2. Select **Atlas Planning Suite - Planning Portal**.

The Add/Remove Programs window displays.



3. Click **Uninstall**. You will be prompted to confirm the uninstall request.

4. Click **Yes**.

5. Click **Yes**.

6. 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 user permissions, license key, and custom settings.*

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

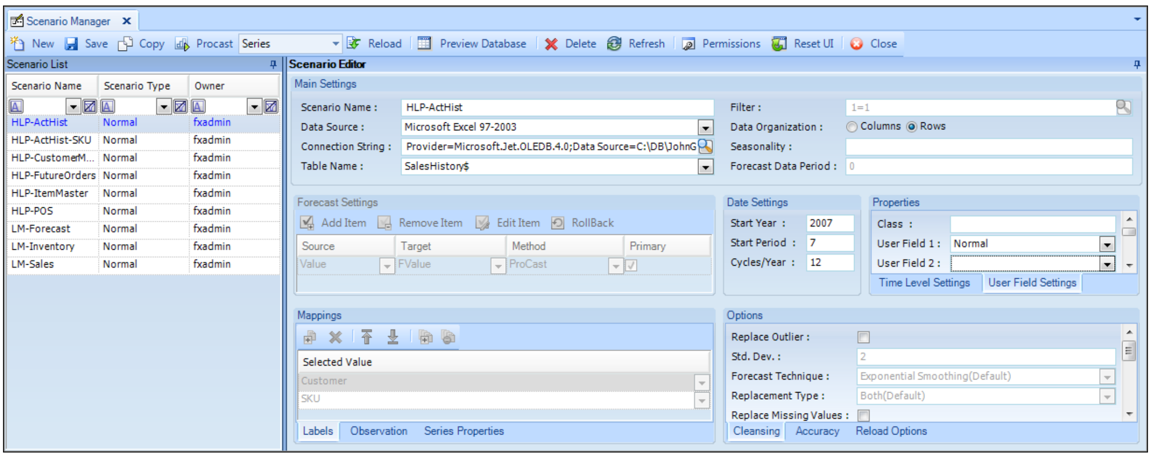
Section 5: DME Admin Settings

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

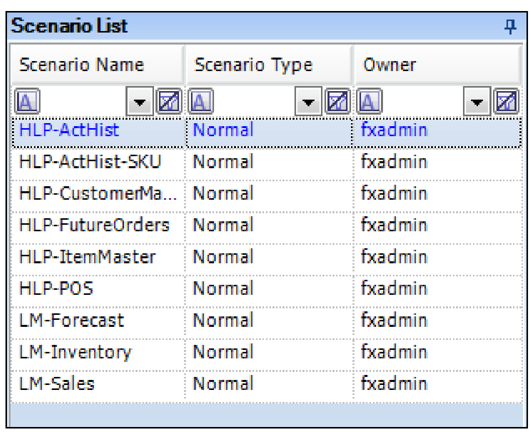
1. Log into the DME Admin Tool.

2. Click the **Scenarios** button in the toolbar.

   The Scenario Manager window displays.

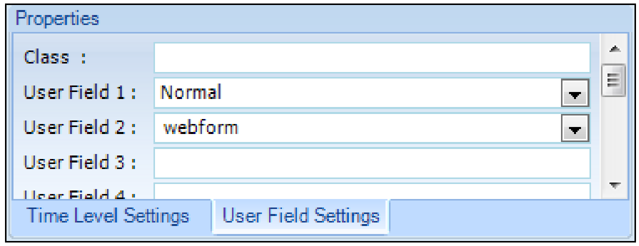


3. Select the scenario to use from the Scenario List in the left panel.



   The Scenario details display in the Scenario Editor panel at the right.

4. In the Properties panel of the Scenario Editor, click the "User Field Settings" tab.



5. Enter or select "WebForm" in User Field 2. This makes the scenario available in the Planning Portal. Only scenarios that have this property set and are Living Master scenarios will be available in the Planning Portal.

6. Click Save.

7. Close the Scenario Manager.

Section 6: Installing the Planning Portal

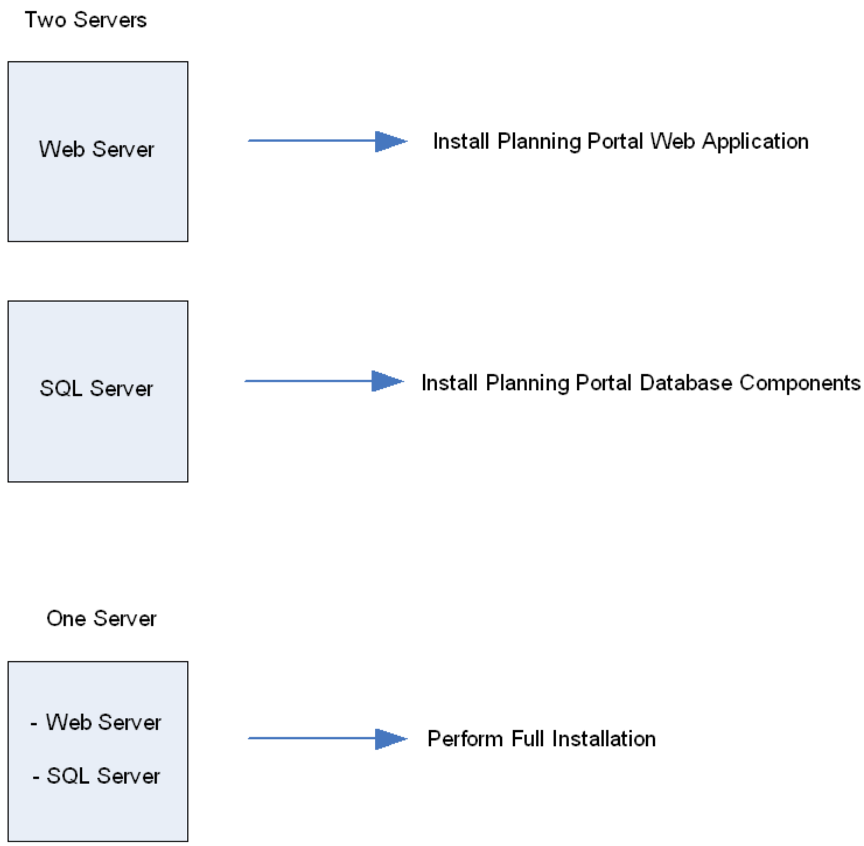
This section details how to install the Planning Portal successfully.

Note: *The Planning Portal installer cannot be installed from a network drive. For security reasons, .NET Framework does not allow an .exe file to run from a network location. The Planning Portal installation files need to be copied locally to the computer where the application will be installed.*

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.

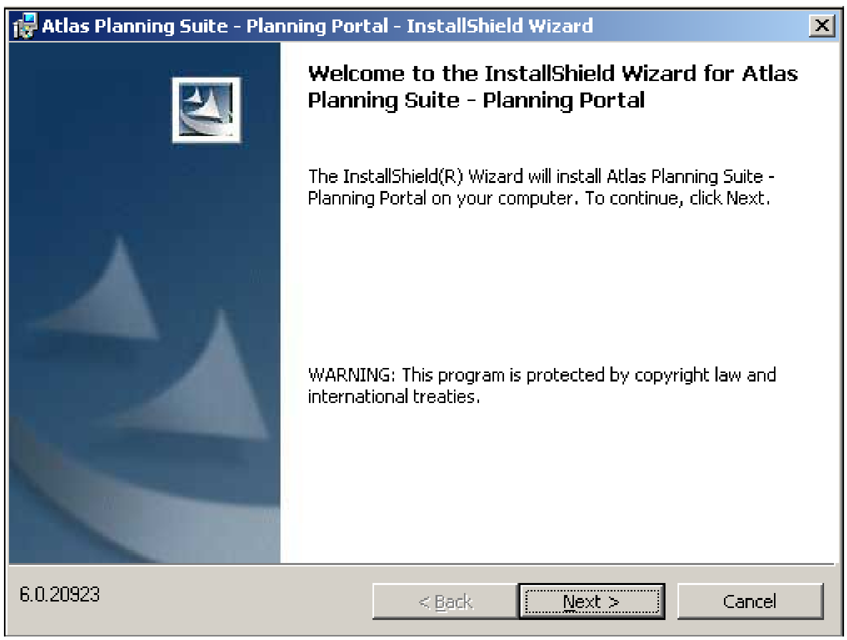
- Demand Management Engine installed.
- A Living Master Scenario (or a default DTL Scenario).

6-3: Installation Process

1. Get the Installation files for the Planning Portal v6. If the file you have is a .zip of .rar file make sure to un-compress the files before installing them.

2. Click on the Setup.exe file.

   The Planning Portal Installation window displays.

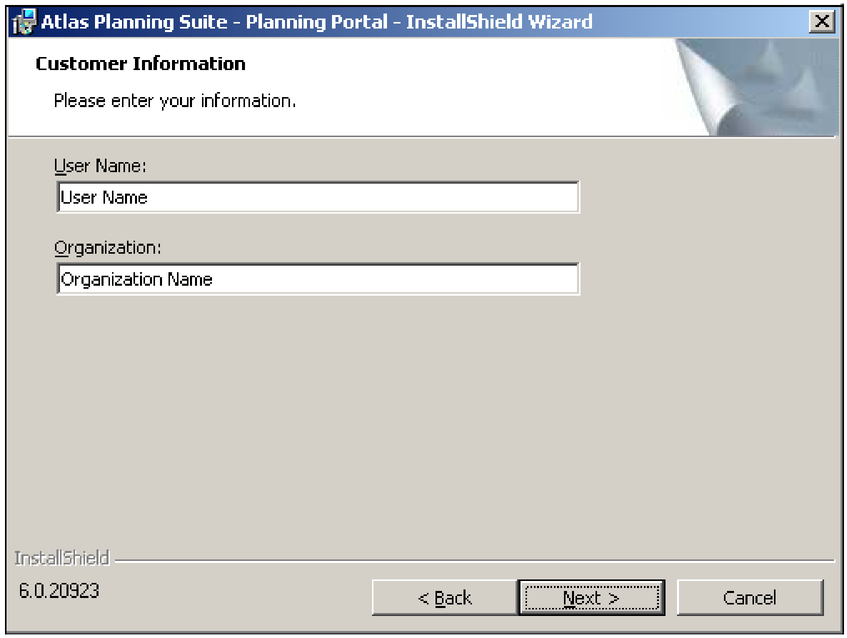


3. Click **Next**.

The Planning Portal License Agreement window displays.

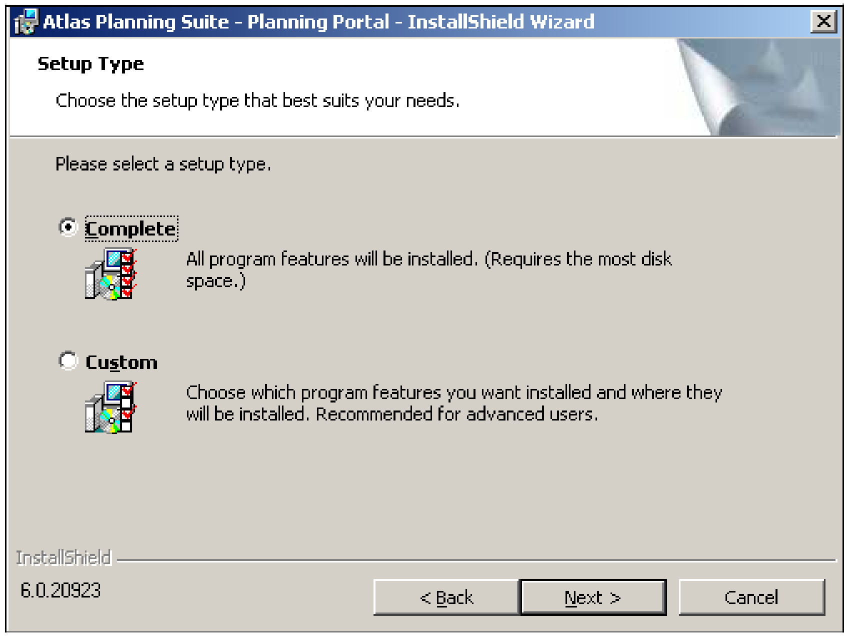
4. After reading the agreement, select the **“I accept the terms in the license agreement”** radio button and click **Next**. Otherwise, click **Cancel** to quit.

The Customer Information window is displayed



5. Enter your **User Name** and **Organization** name in the respective fields and click **Next**.

The Setup Type window is displayed:

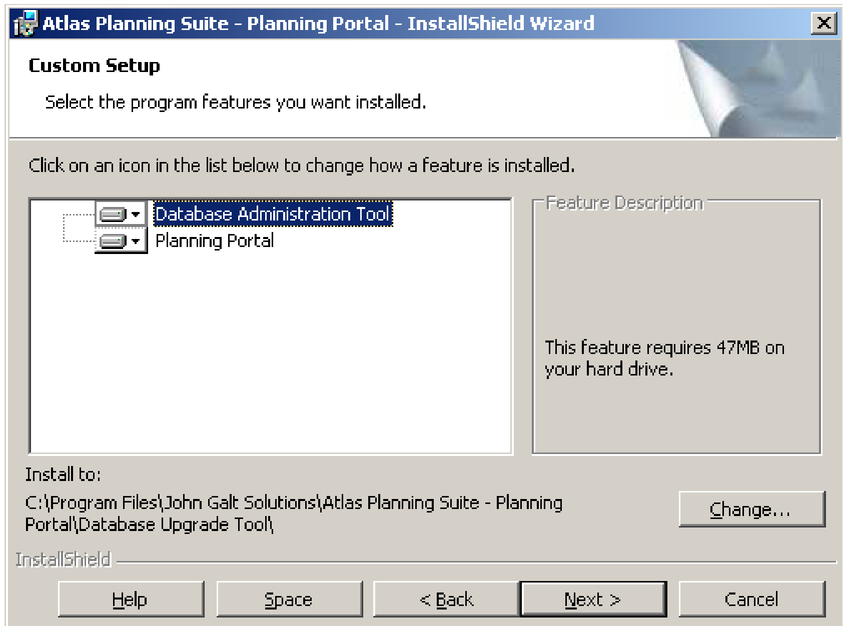


6. There are two types of installations for the Planning Portal, the “Complete” option will install all the available components and the “Custom” option allows you to select which components to install. The following table describes the different components that can be installed for the Planning Portal:

Component	Description
Database Administration Tool	This component updates the Planning Portal Database to the latest version as well as installing necessary components for the DB Server.
Planning Portal	This component contains the actual files to install the Planning Portal in a web server.

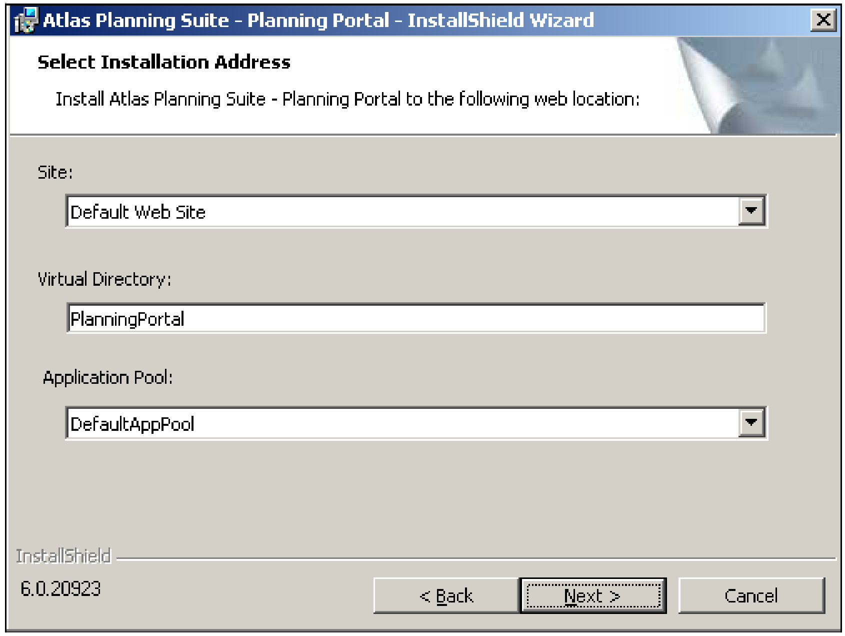
You will probably want to use the **Complete** option when your Web Server and SQL Server are on the same computer, and the **Custom** option when your SQL Server and Web Server are different servers, this way you will be able to only install the Planning Portal component in the Web Server and only the Database Administration tool in the SQL Server.

If you run a **Custom** install, you will be prompted with the following screen to choose the components to install:



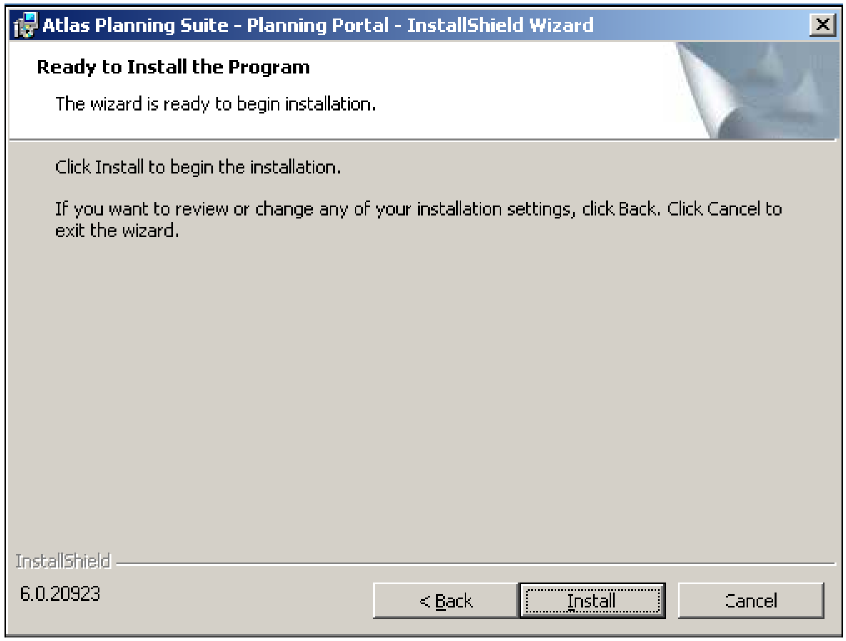
7. Click **Next** to continue the install. If you select the Planning Portal component or a Complete install continue to Step 8; if you only selected to install the Database Administration Tool, skip to step 10.

8. The following screen is the Installation Address. Here you can choose certain options for the Planning Portal component installation:

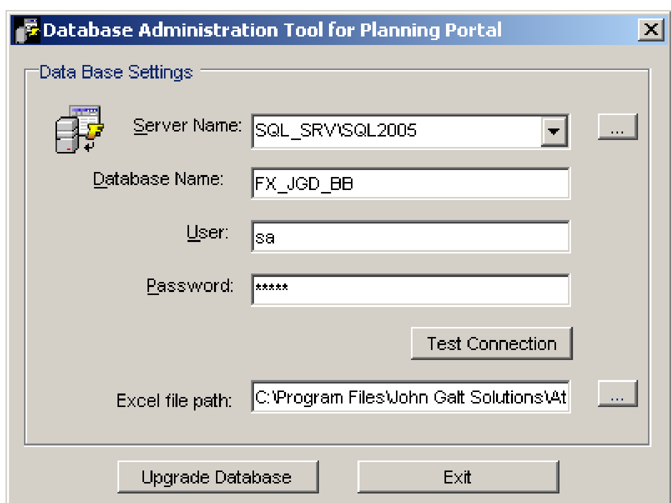


These settings are related to IIS; you are able to setup the **Site** under which to install the Planning Portal, the name of the **Virtual Directory** and the **Application Pool** the Planning Portal will be associated with. Unless you are familiar with these settings use the defaults and click **Next**.

9. The Ready to Install screen will be displayed, if you are sure your settings are correct just click **Install** to continue.



10. If the Database Administration Tool component was selected you will be prompted with the following screen:



In this screen you must provide the information to be used to connect to the database including **Server Name**, **Database Name** and SQL **User** account and **Password** to connect to the database.

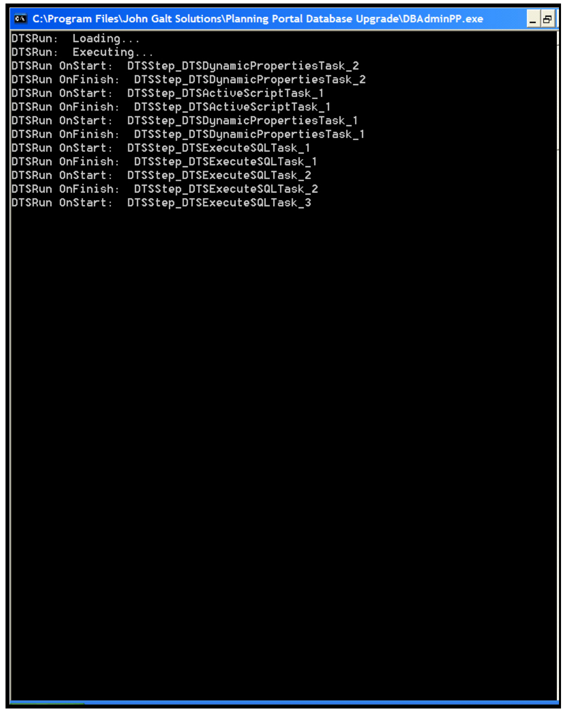
When performing upgrade on the database the system administrator account (“sa”) should be used always. For regular operations for the Planning Portal you can change the SQL account used in the PP Admin Tool.

The **Excel file path** is the path to a file used for the promotions feature, If you are not planning on using this feature the default value is fine.

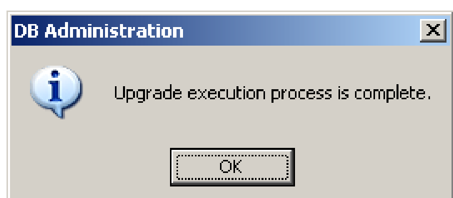
- Month-Week.xls - if your Promotions are run weekly.
- Week-Day.xls - if your Promotions are run daily.

After all the database related information is input you can test your connection by clicking the **Test Connection** button. If the test is successful, click the **Upgrade Database** button to begin the process.

The following window displays while running the upgrade.

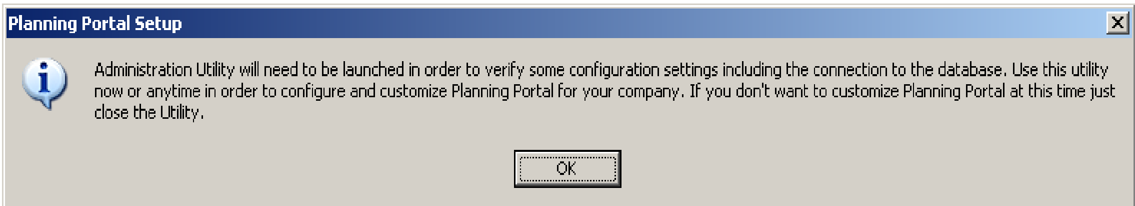


When the process is completed you will see the following message



11. Click **OK**.

If you chose to install the Planning Portal component or a Complete Installation option, the Planning Portal Setup window displays. You can configure the Administration Utility now or at a later time.

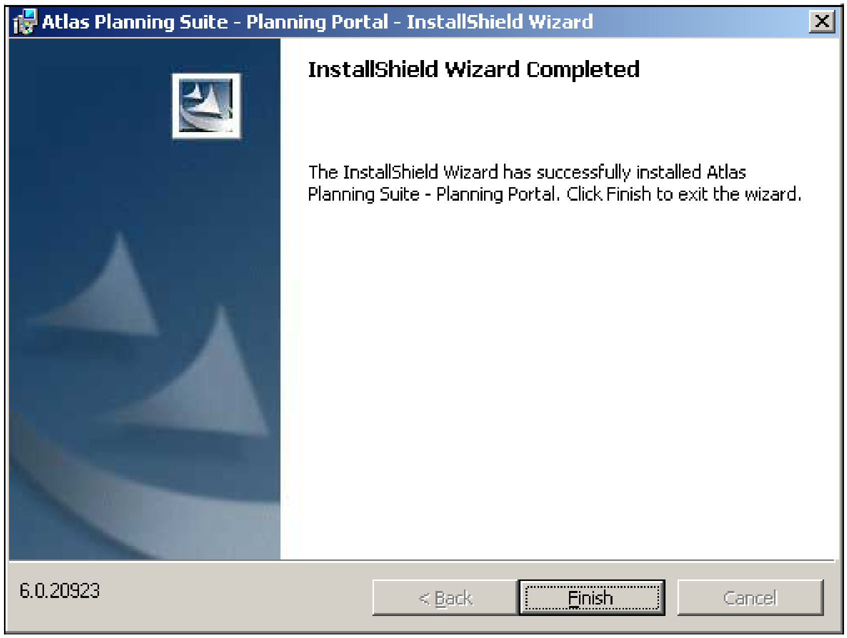


12. Click **OK** to launch the Administration Utility, the PP Admin Tool.

Note: *To configure and customize the Planning Portal later, the Administration Tool can be found at Start > All Programs > JGS - Atlas Planning Suite > Planning Portal > Planning Portal Admin Tool.*

13. The PP Admin tool is launched next, you can now start making changes to your PP installation, import old settings or install a license; you can find more information on how to install a license in the following section.

14. After saving your changes and closing the PP Admin Tool you will have the PP Release Notes file open in your browser and you will see the following screen. The installation is now complete.



6-4: Planning Portal License

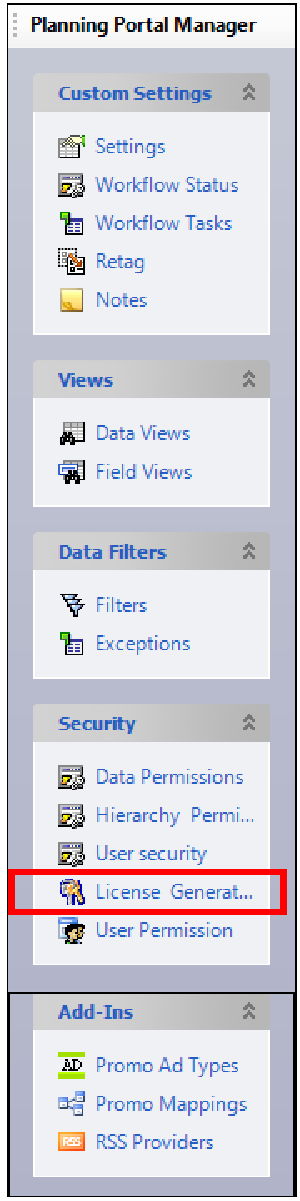
To begin using the Planning Portal, you must create a random serial number and a license key, which is provided by QAD Inc.

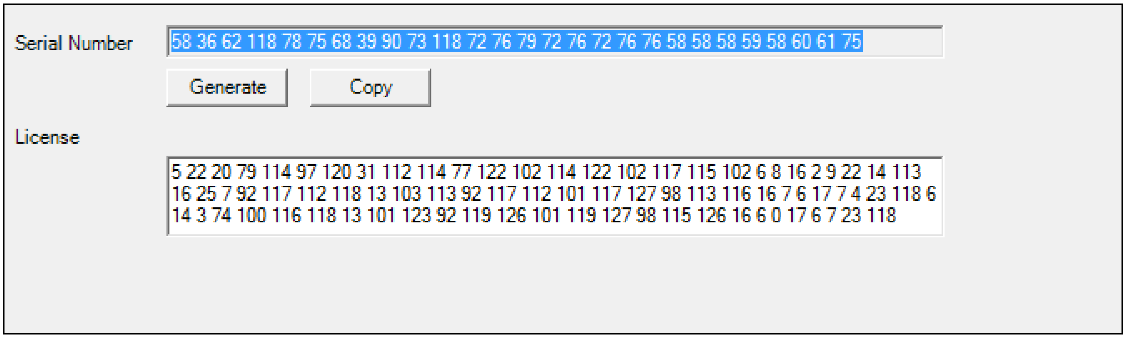
To generate your serial number:

1. Go to **Start > All Programs > JGS - Atlas Planning Suite > 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”.





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 support. You must contact QAD for a license key.

   When you receive the license key, 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.

Note: *If for whatever reason the license for the PP becomes invalid when trying to save a new one you will need to generate a new random serial number.*

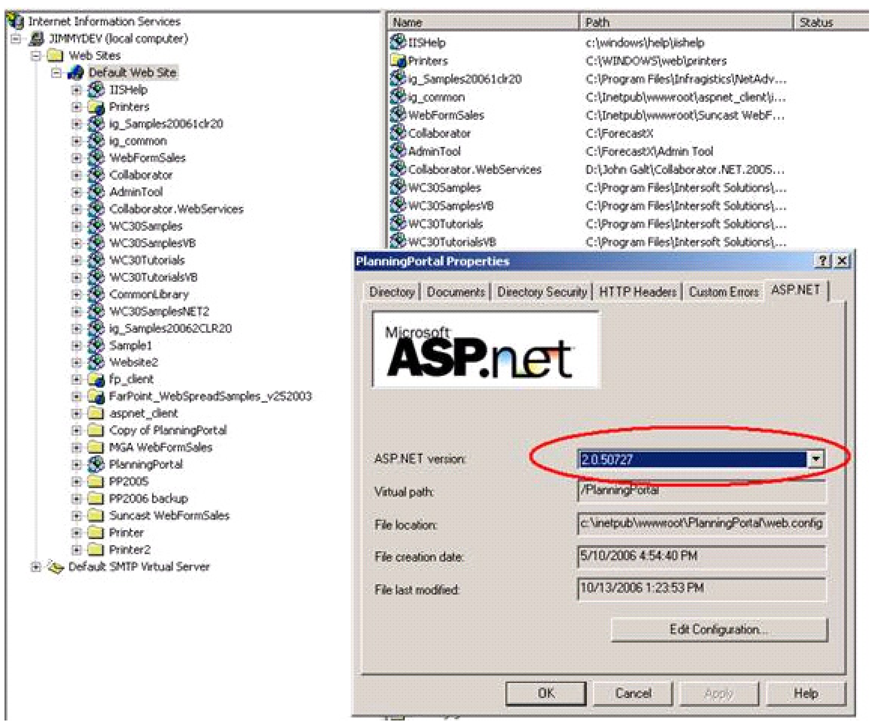
Section 7: Miscellaneous Installation Configurations

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 on 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. If not, select Version 2.0 from the drop-down.



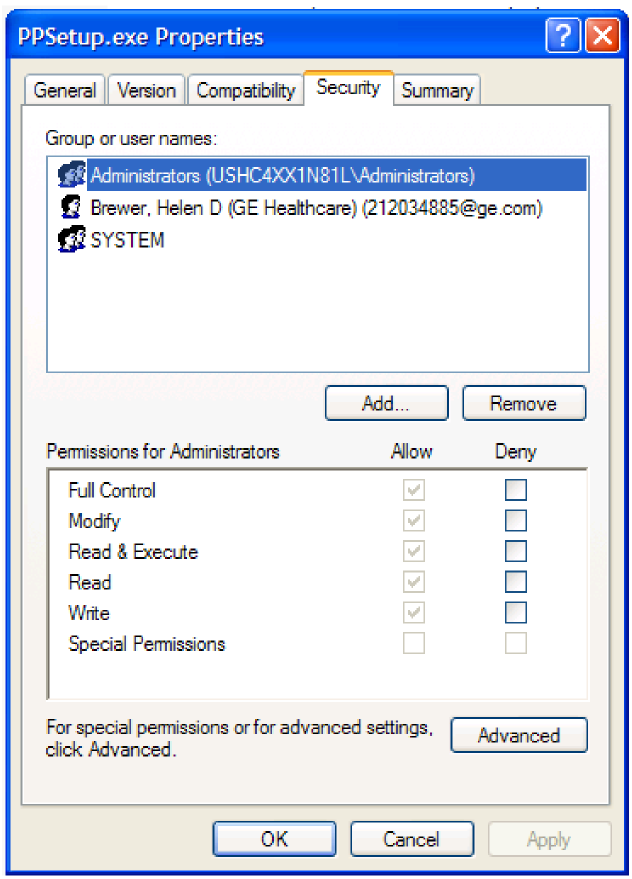
7-2: Write Access to the Planning Portal's Physical Directory

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 click **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.

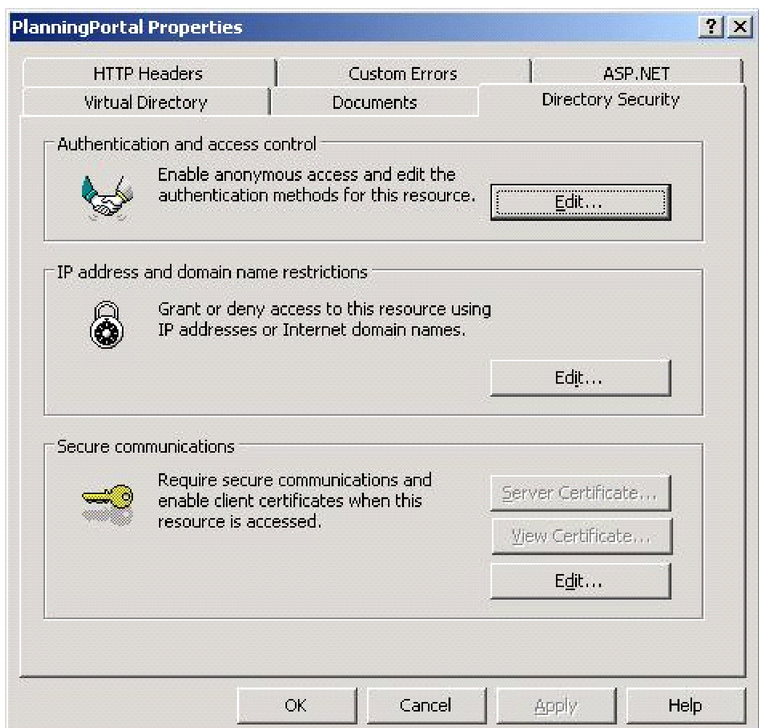
To enable Windows Integrated Authentication:

1. Open Internet Information Services (IIS) Manager.

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

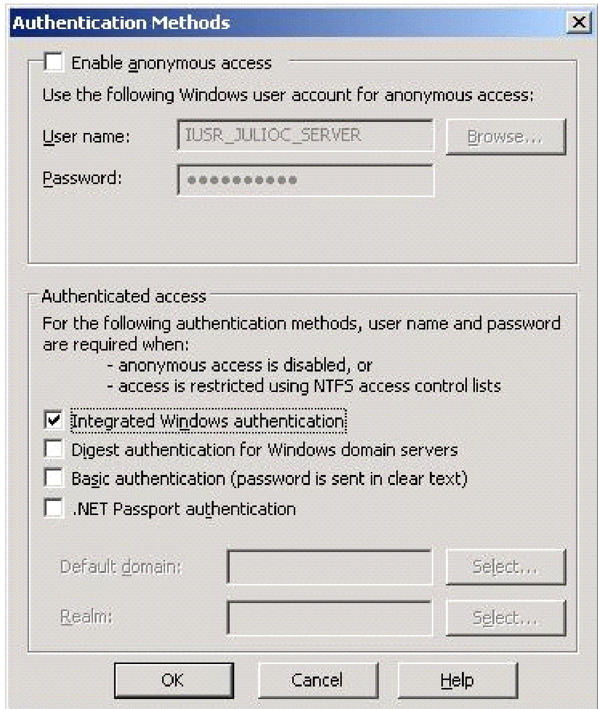
2. Right-click the Planning Portal virtual directory and select "Properties".

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.

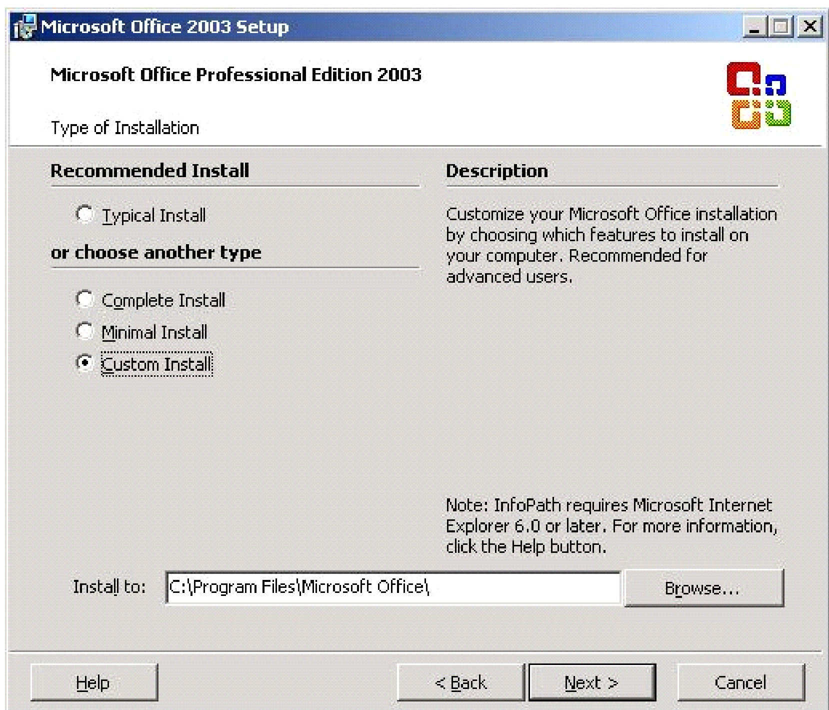
7-4: Excel 2003 Primary Interop Assembly

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.

The primary interop assembly is not installed when performing a default installation of Microsoft Office; a custom installation is required to install it. Below is an example on how to enable this component while installing Microsoft Excel 2003, a similar procedure should be followed when installing Office 2007 or Office 2010:

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

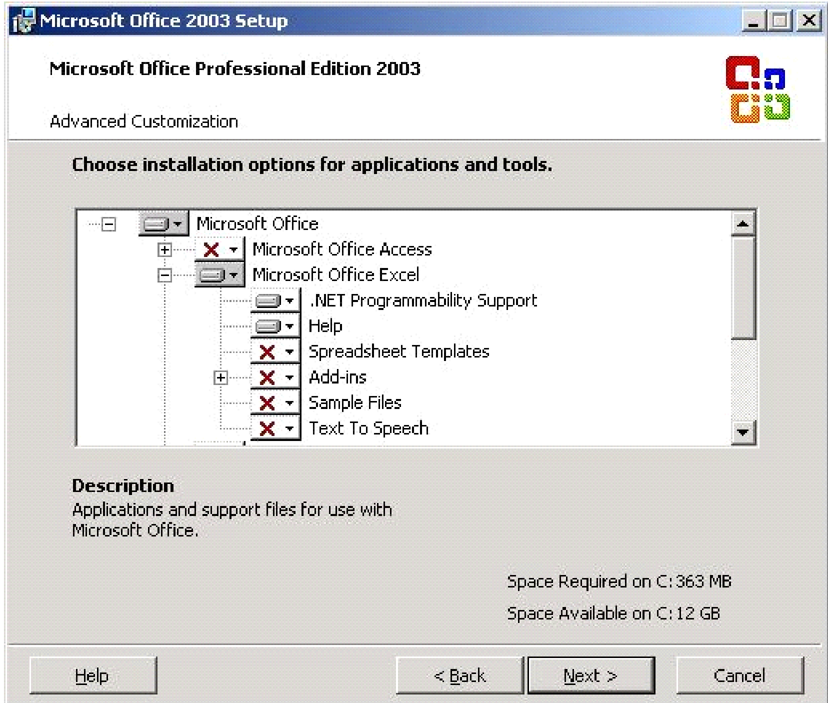
2. Select “Custom Install” and click **Next**.



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**.

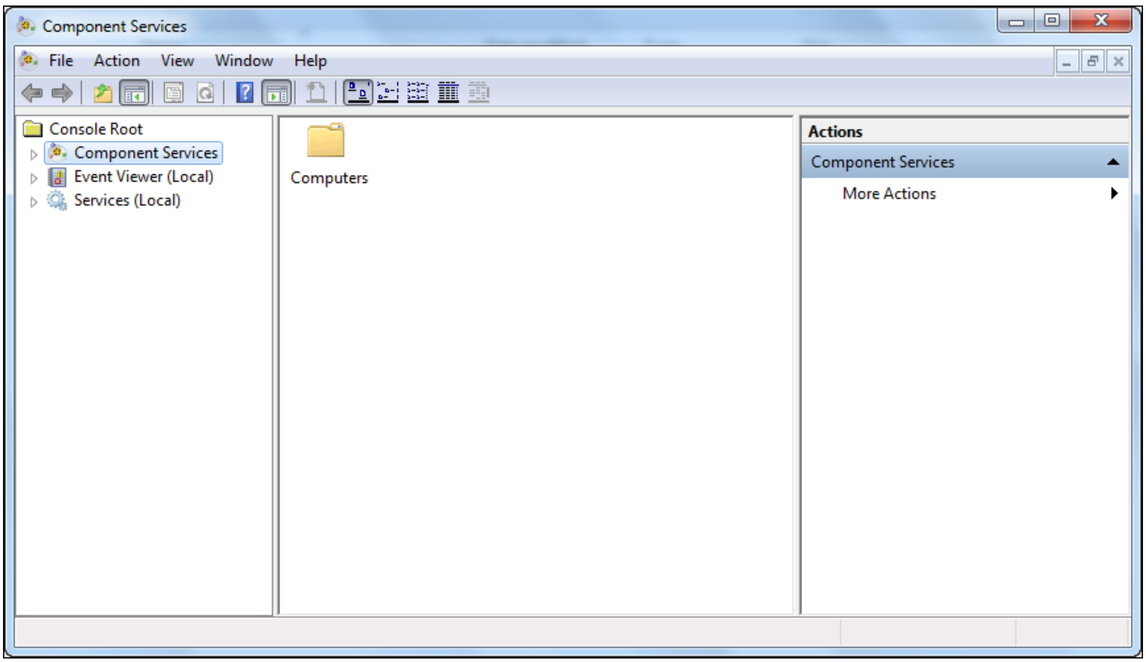
6. Click **Install** in the next window and proceed with the default settings installation.

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.*

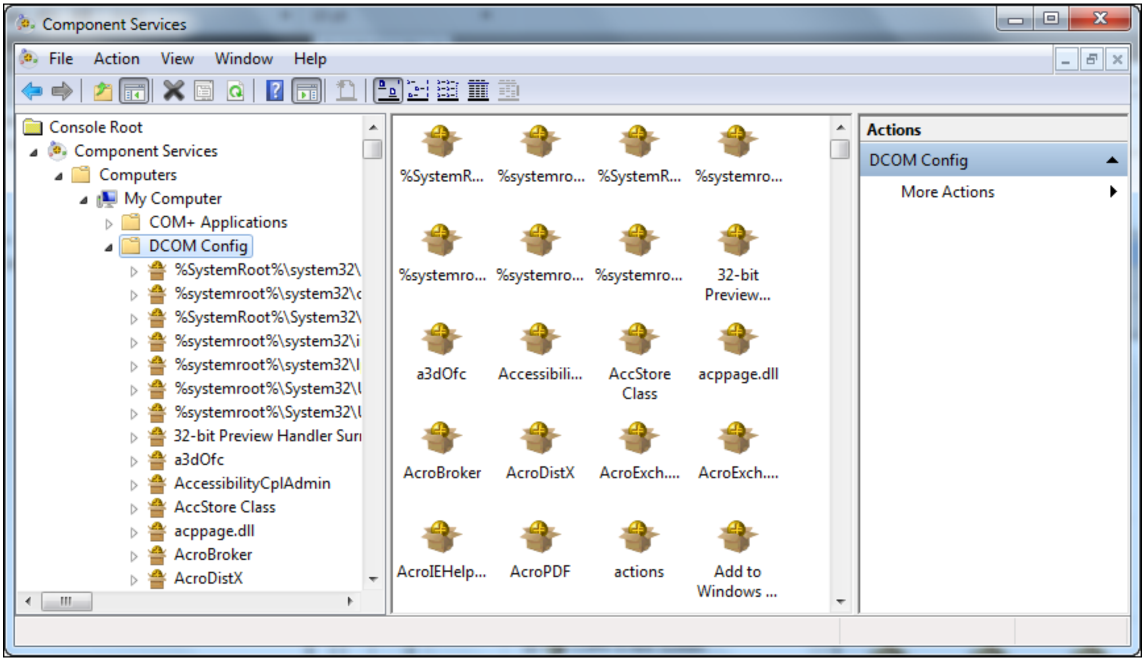
1. Go to **Control Panel > Administrative Tools > Component Services**.

   The Component Services window displays.



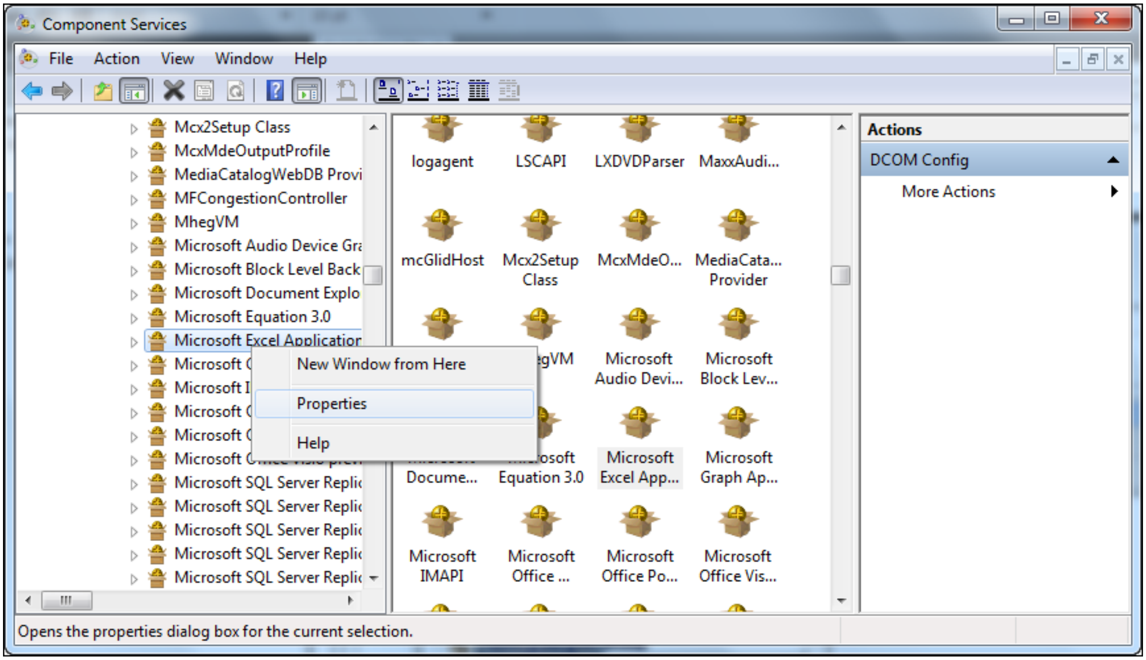
2. Browse to **Component Services > Computers > My Computer > DCOM Config**.

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”.

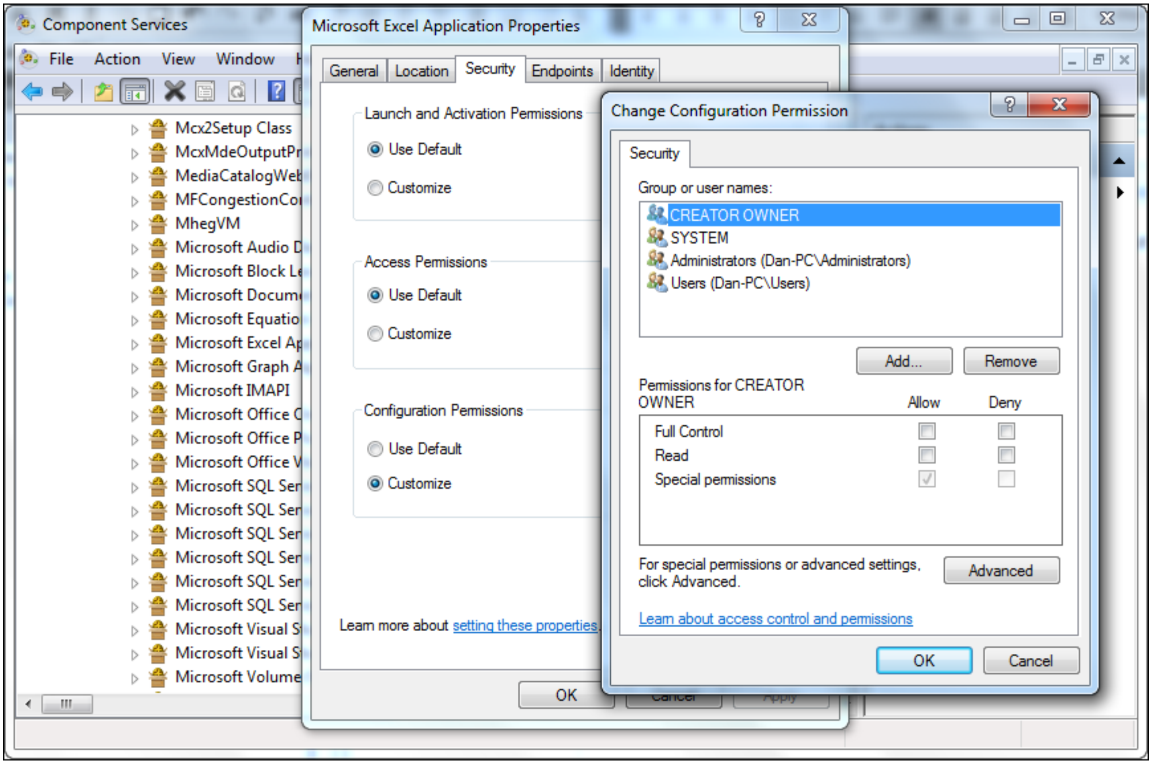


6. Select the **Security** tab and select the “Customize” option under Configuration Permissions.

7. Click the **Edit** button.

8. In the **Change Configuration Permission** window, add the following two accounts: **ASPNET** and **Network Service** (or the account under which the Default Application pool is running) and grant it “**Full Control**” permissions; this applies for Windows XP and Windows

2003 Server. For Windows 7 or Windows 2008 Server you must add the local **Everyone** account and give it **Full Control**.

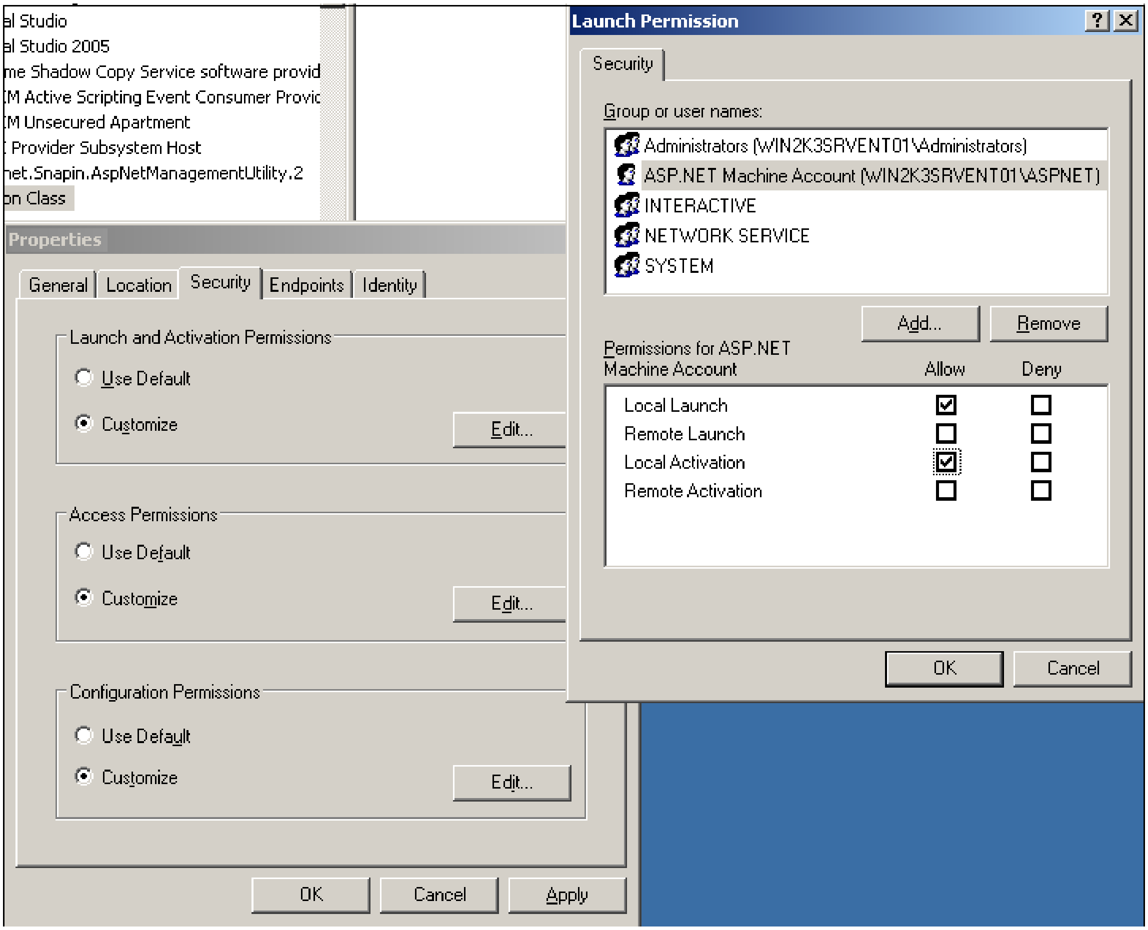


9. Click **OK** to save the permission changes and exit.

10. Select the **Security** tab and select the "**Customize**" option under **"Launch and Activation Permissions"** and **"Access Permissions"** section.

11. In the **Launch Permission** window, add the following two accounts: **ASPNET** and **Network Service** (Or the account under which the Default Application pool is running under) and check the "**Local**

Launch" and "**Local Activation**" permissions under the Allow column.



Chapter 3 Configuration

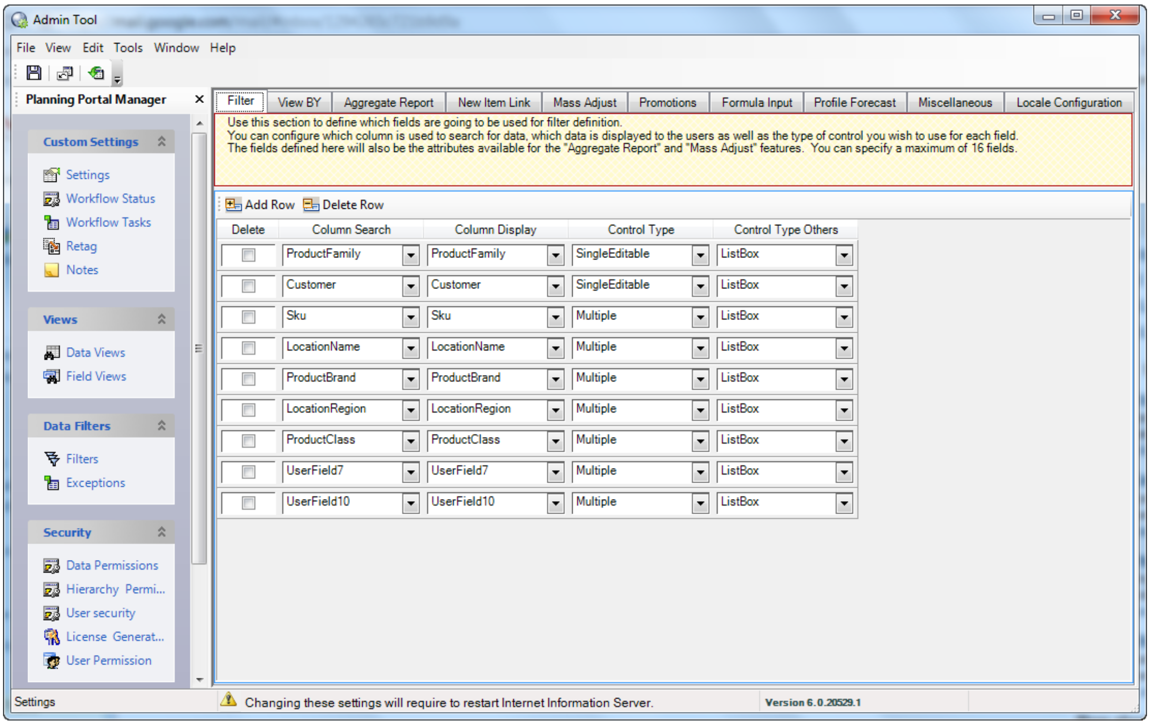
This chapter includes:

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

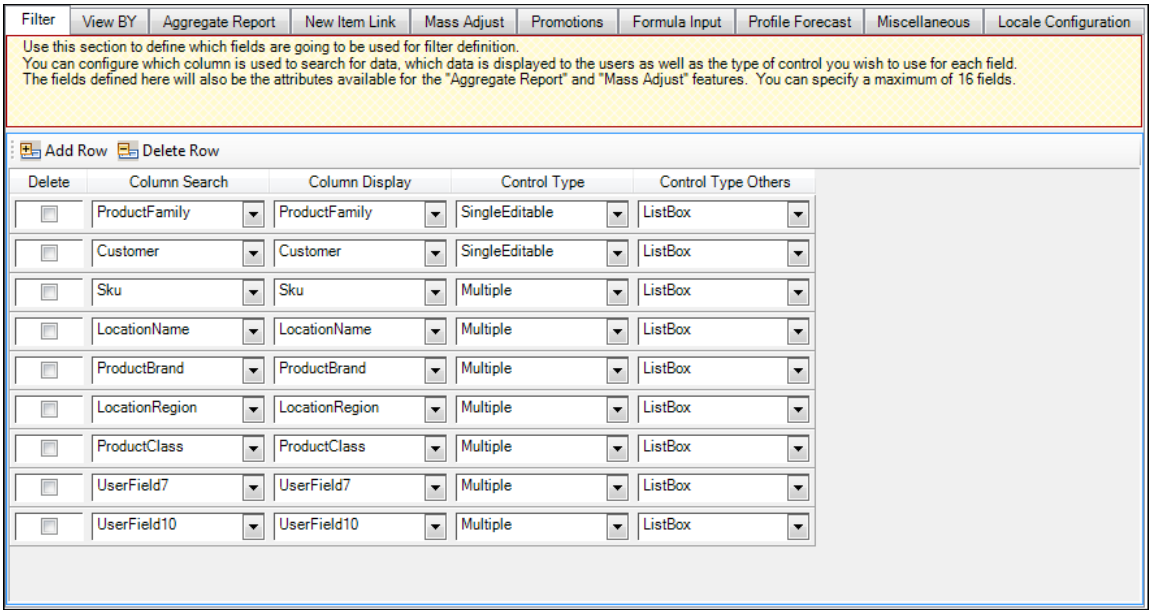
Tab	Description
Filter	Determines which fields are going to be used for filter definition in the Aggregate Report and Mass Adjust features.
View By	Determines which View By fields are available.

Table 3-1: Admin Tool tabs

Tab	Description
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.



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	There are three types of controls: ■ **Multiple -** multiple selection capability. ■ **Single Editable -** choose a field from the list or type in the search criteria. ■ **Text Box -** ability to type in the search criteria.

Configuration	Description
Control Type Others	There are two types of fields: ■ **List Box -** drop-down list of available options. ■ **Web Combo -** combination of drop-down and text box options.

3-1: To Add a Filter

1. Click the 

button.

   A new row is added at the bottom of the list.

3-2: To Delete a Filter

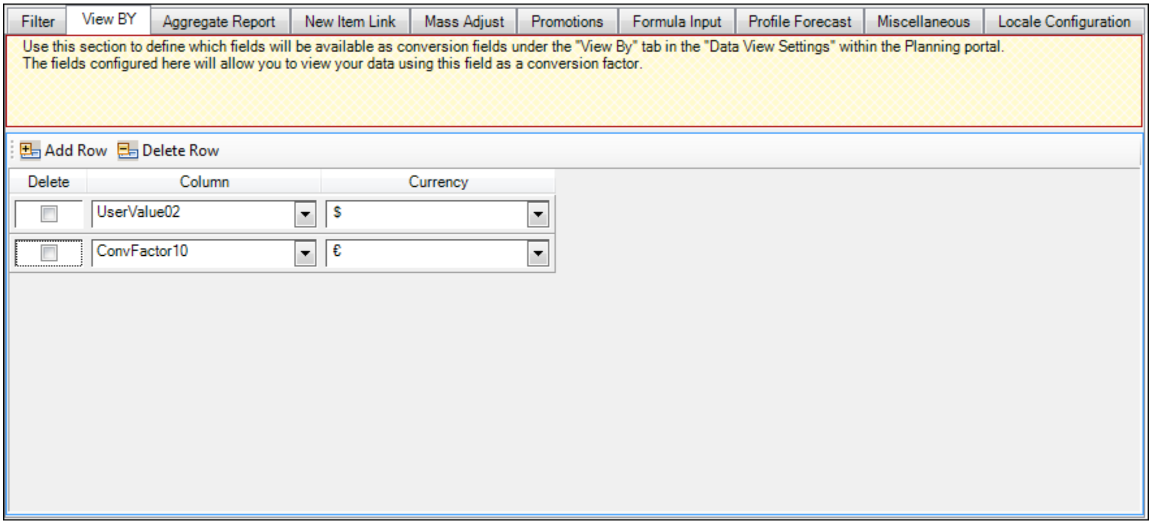
1. Click on the Delete checkbox next to the field and click on the 

button.

   The row is deleted from the list automatically.

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.
Currency	Used to select the financial currency in which the Column value is displayed.

4-1: To Add a Field

1. Click the 

button.

A new row is added 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

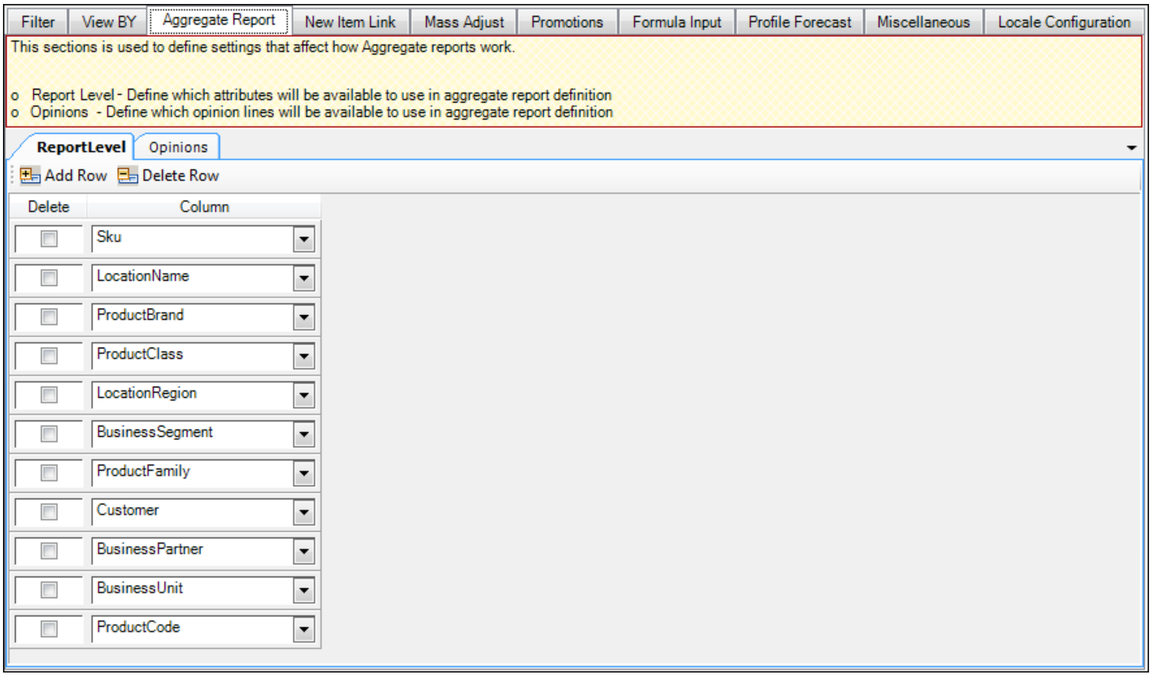
   button.

   The row is deleted from the list automatically.

Section 5: Aggregate Report

5-1: Report Level

The Report Level tab determines which fields are displayed in the Report Level.



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 the 

button.

   A new row is added at the bottom of the list.

5-1-2: To Delete a Field

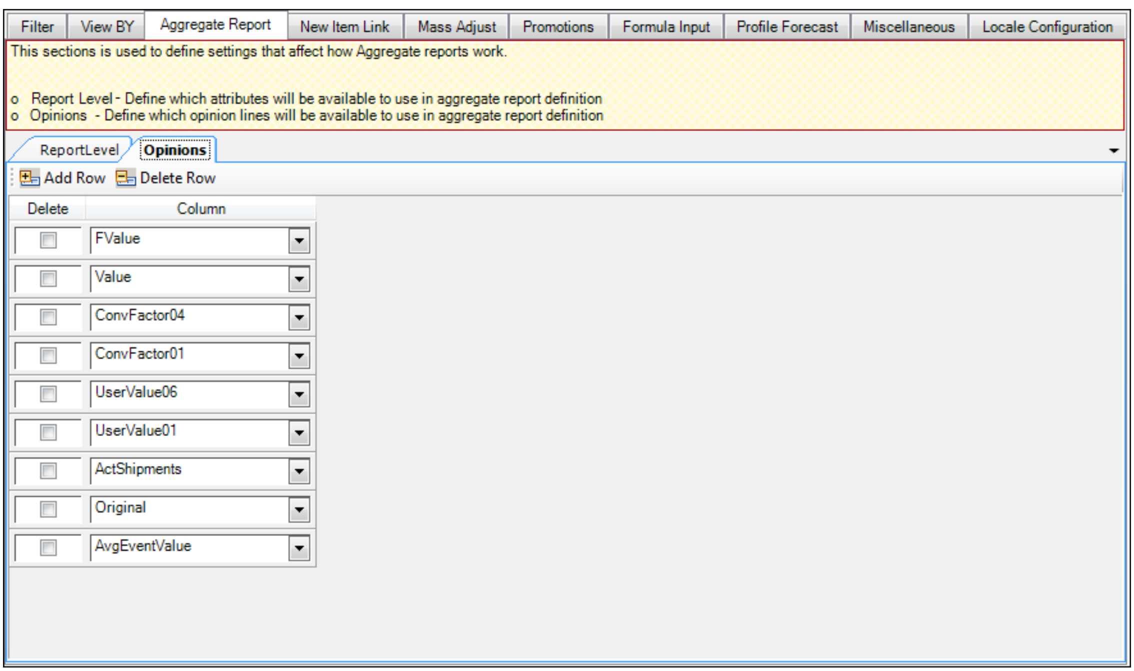
1. Click on the Delete checkbox next to the field and click on the 

button.

   The row is deleted from the list automatically.

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 the 

button.

   A new row is added at the bottom of the list.

5-2-2: To Delete an Opinion

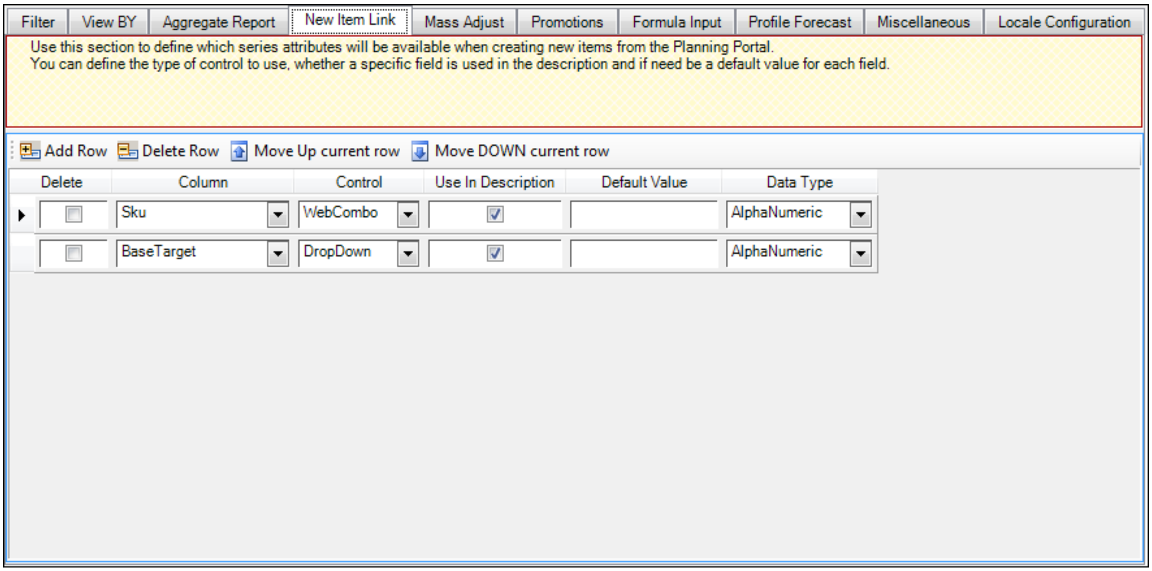
1. Click on the Delete checkbox next to the Opinion Line and click on the 

button.

   The row is then deleted from the list automatically.

Section 6: New Item Link

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



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

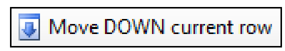
Configuration	Description
Column	Determines which fields are displayed in the New Item feature.
Control	There are three options: ■ **Drop Down -** enables you to select from a list of what is already in that field. ■ **Text Box -** enables you to enter information directly into that field. ■ **Web Combo -** combination of Drop Down and Text Box options.
Use In Description	Determines whether or not the field is used in the description of the new item.

Configuration	Description
Default Value	This is the value selected by default.
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 

or the 

buttons.

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

6-1: To Add a Field

1. Click the 

button.

   A new row is added at the bottom of the list.

6-2: To Delete a Field

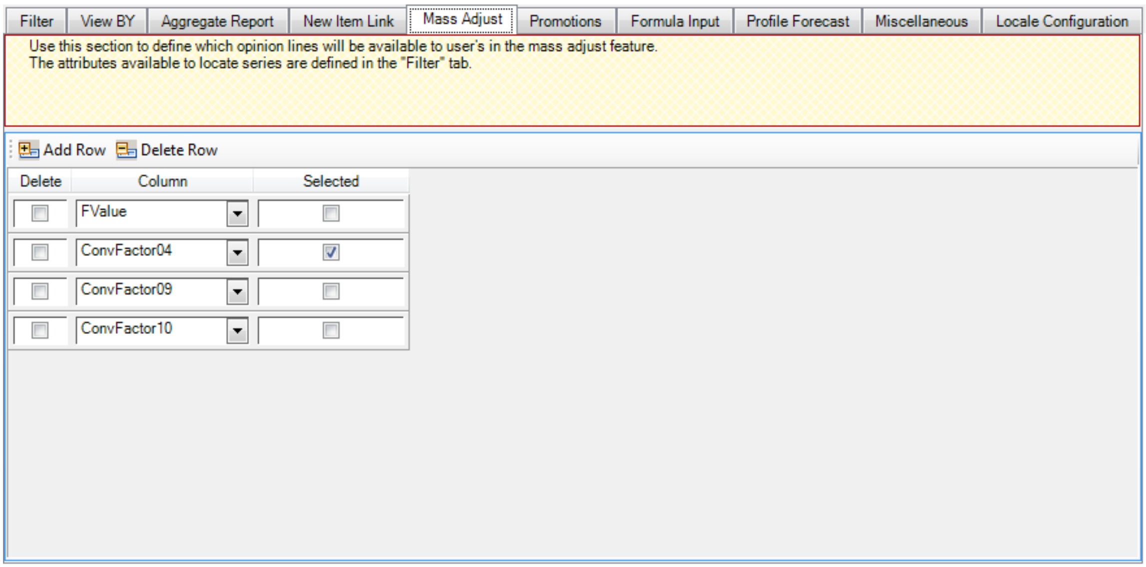
1. Click on the Delete checkbox next to the field and click on the 

button.

   The row is deleted from the list automatically.

Section 7: Mass Adjust

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



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 the 

button.

A new row is added at the bottom of the list.

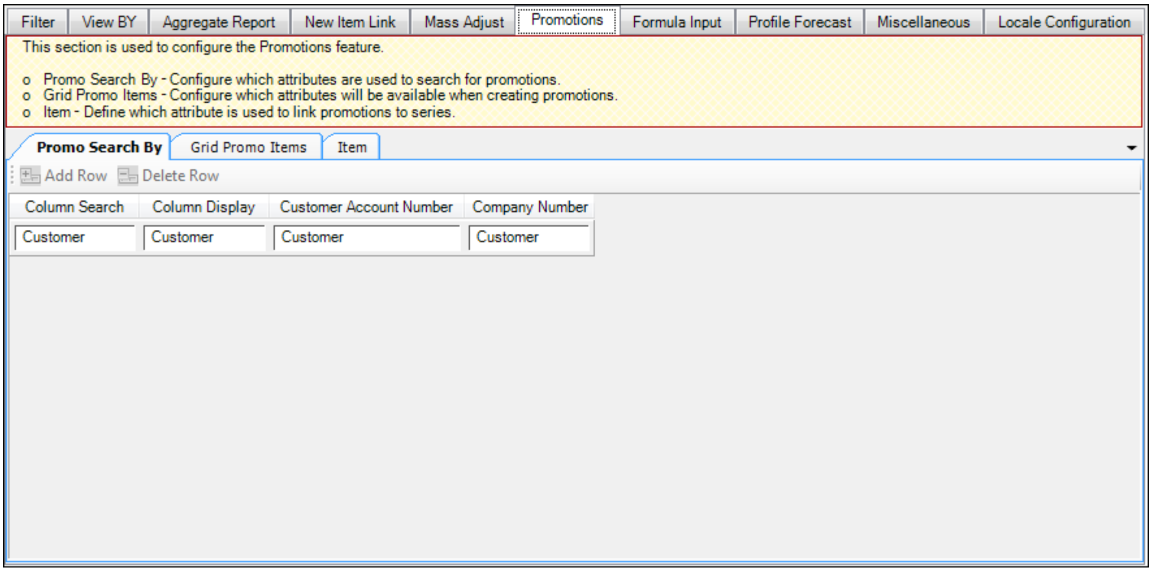
7-2: To Delete an Opinion Line

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

button.

Section 8: Promotions

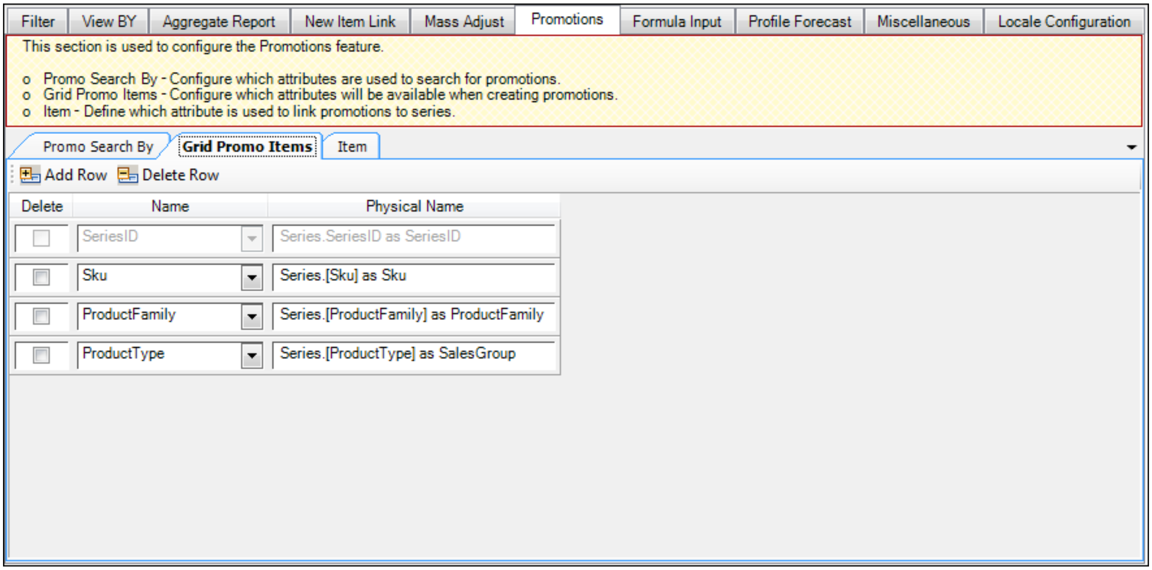
8-1: Promo Search By



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.

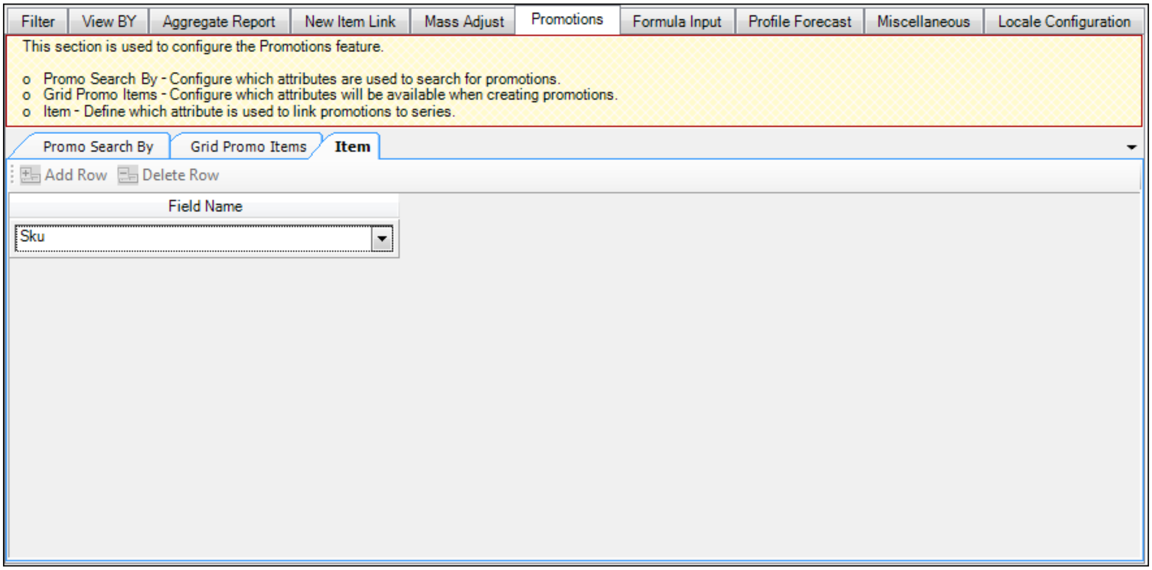
8-2: Grid Promo Items



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.
Physical Name	Sql statement to return labels for the Attributes. (Advanced)

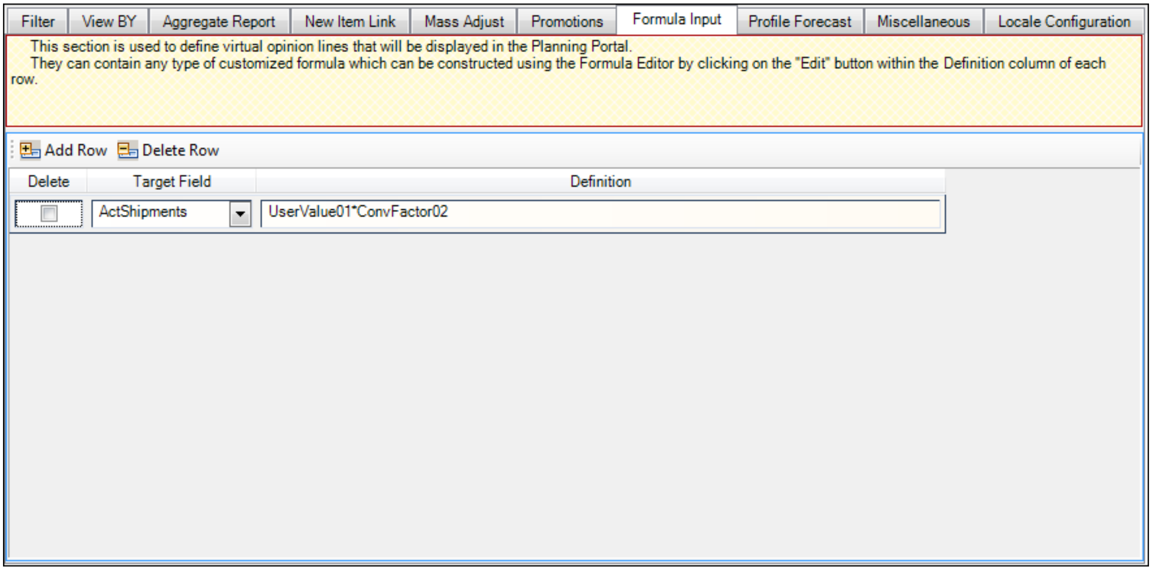
8-3: Item



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



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= Target Field, B+C = definition)

9-1: To Add a New Formula Row

1. Click on the  icon.

   A new row is added to the bottom of the list. To create a formula for this new row see the "To Edit an Existing Formula Row" on page 69 section.

9-2: To Delete an Existing Formula Row

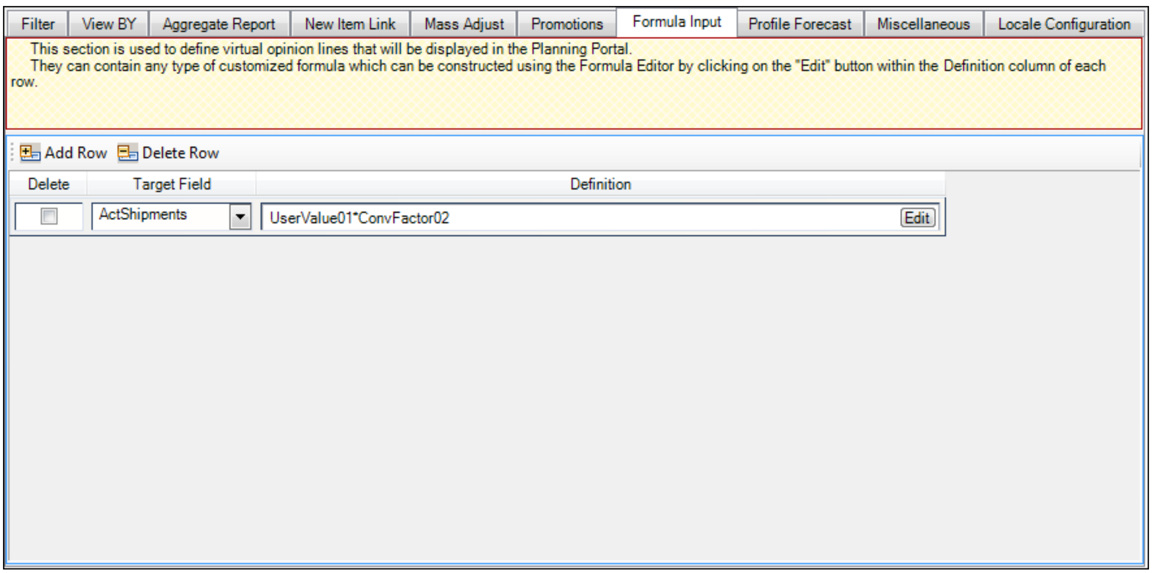
1. Click on the Delete checkbox next to the formula and click the Delete Row button.

   The row is deleted from the list automatically.

9-3: To Edit an Existing Formula Row

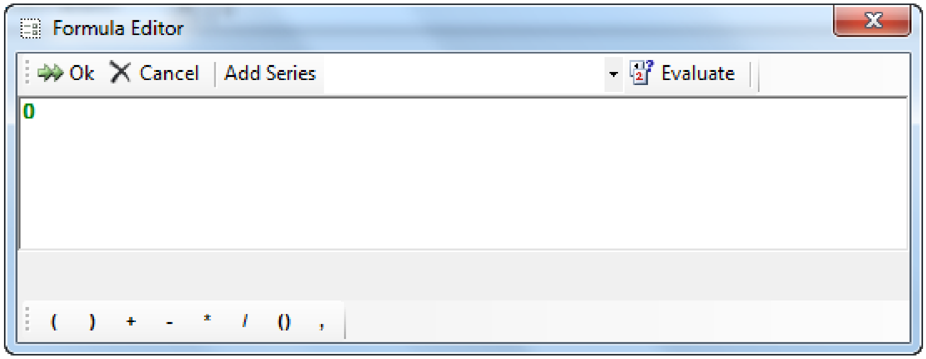
1. Click on the text box you would like to edit.

   The **Edit** button displays in the text box



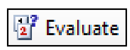
2. Click the Edit button.

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  button.

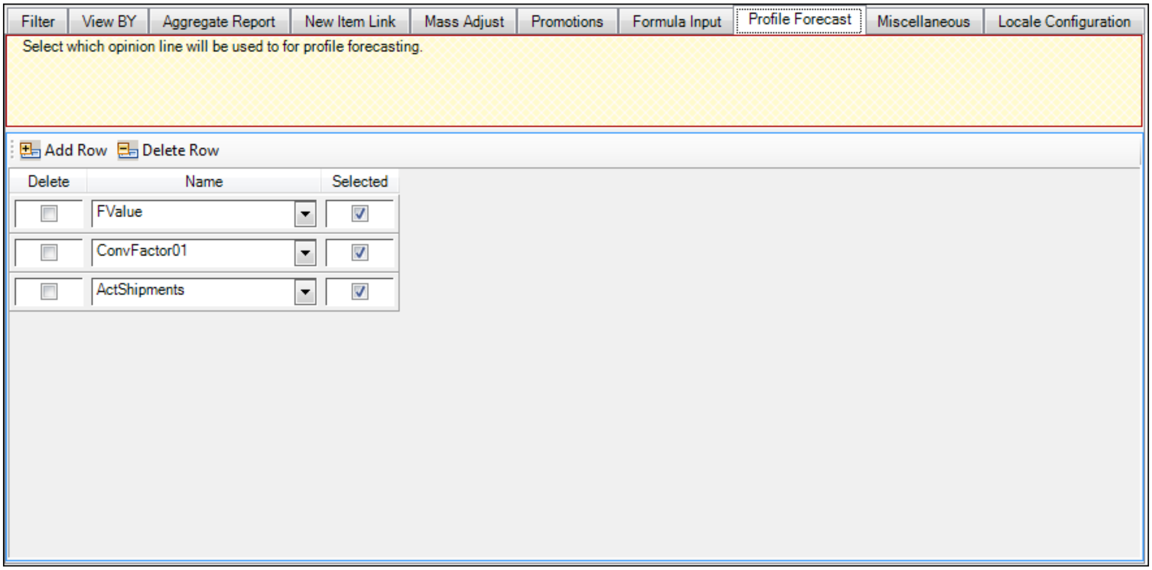
6. Click **OK** when finished.

Note: *The PP Admin Tool allows negative values to start in the formula, but the Planning Portal does support it. The following work around can be used:*

(UserValue01 - UserValue01 - UserValue01) = -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 DME Viewer.



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 New Row

1. Click on the  icon.

   A new row is added to the bottom of the list. To create a formula for this new row see the “To Edit an Existing Formula Row” on page 69 section.

10-2: To Delete an Existing Row

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

button.

The row is deleted from the list automatically.

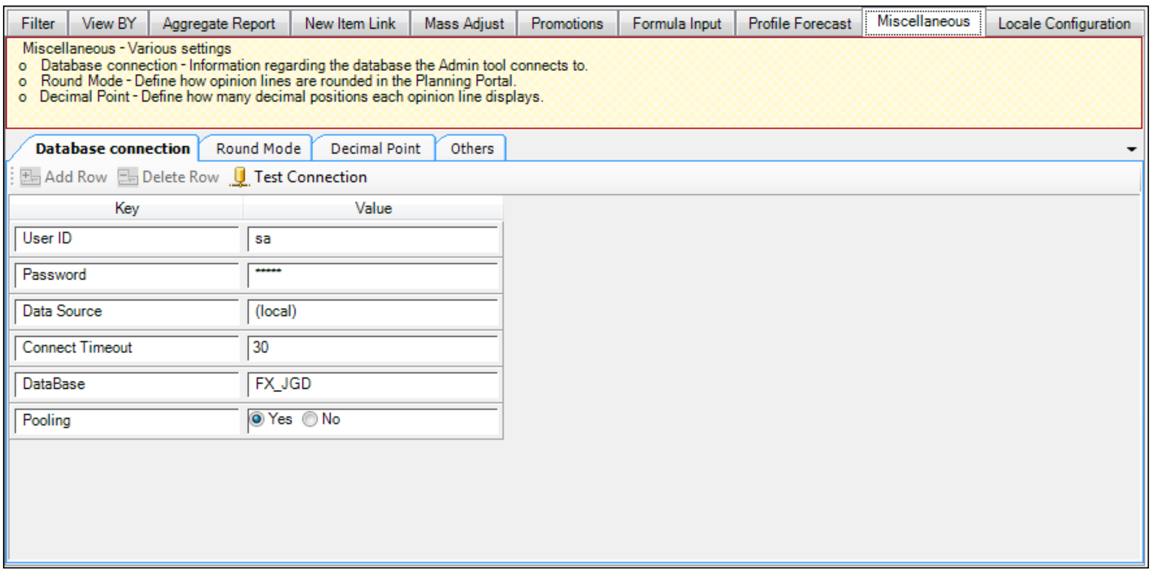
Section 11: Miscellaneous

11-1: Database Connection

The Database Connection tab details the configuration for the database.

You can test the database connection by clicking the 

button.

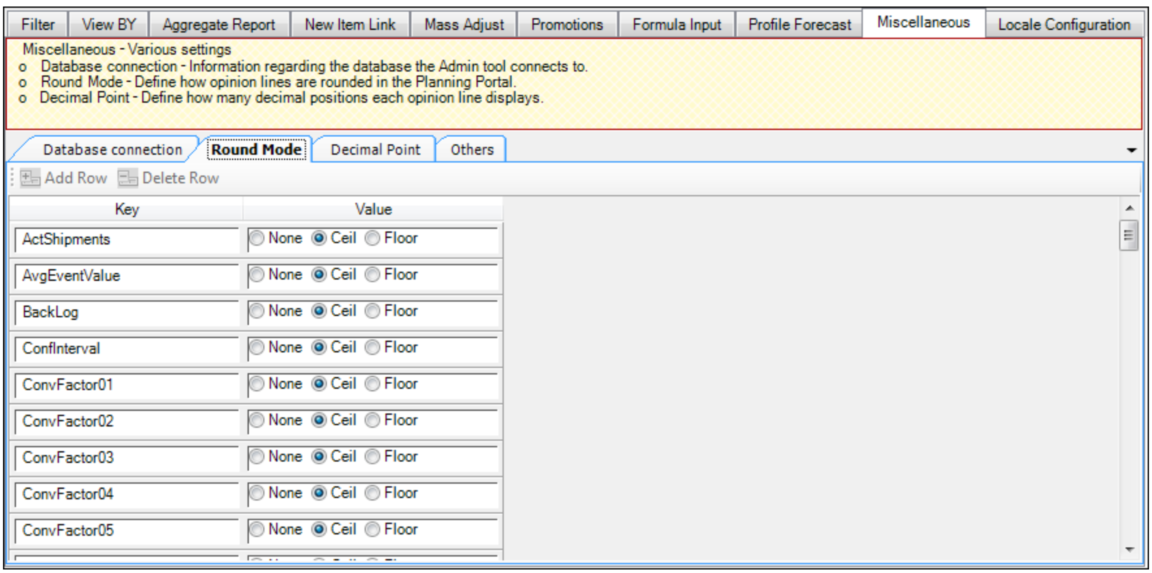


The table below details the types of configurations that can be used:

Key	Description
User ID	Database user's Username
Password	Database user's Password
Data Source	Database server name
Connect Timeout	Amount of time system attempts to connect before disconnecting.
DataBase	Database name

Key	Description
Pooling	Select if you would like to share connections between users (Recommended) (Advanced).

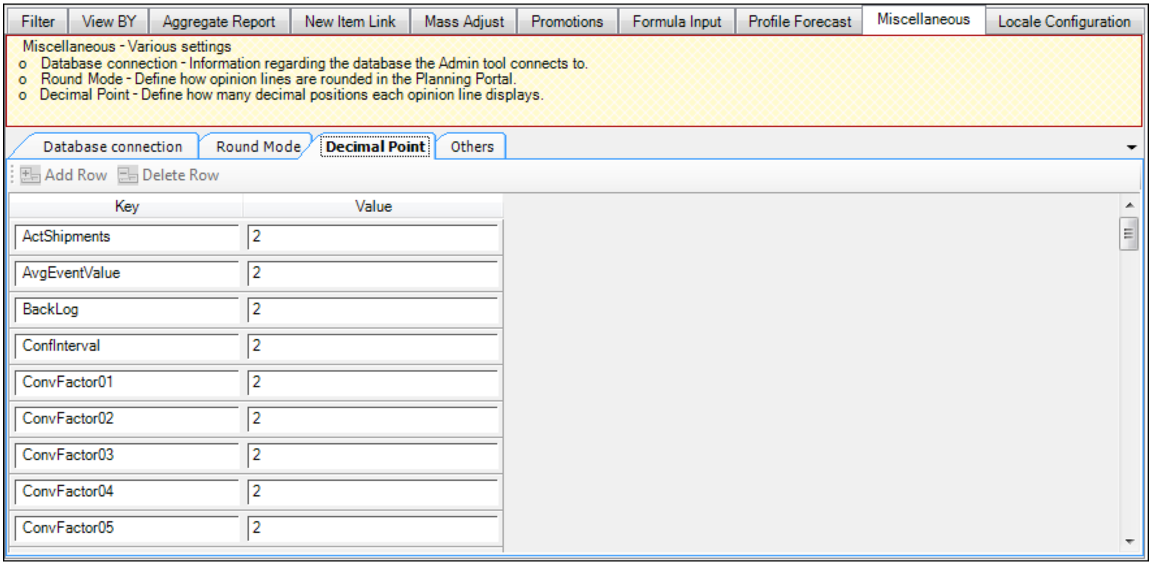
11-2: Round Mode



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

Configuration	Description
Key	Each Opinion Line listed.
Value	■ **None -** Provides the value to the nearest whole number. ■ **Ceil -** Rounds up number to the next whole number. ■ **Floor -** Rounds down number to the next whole number.

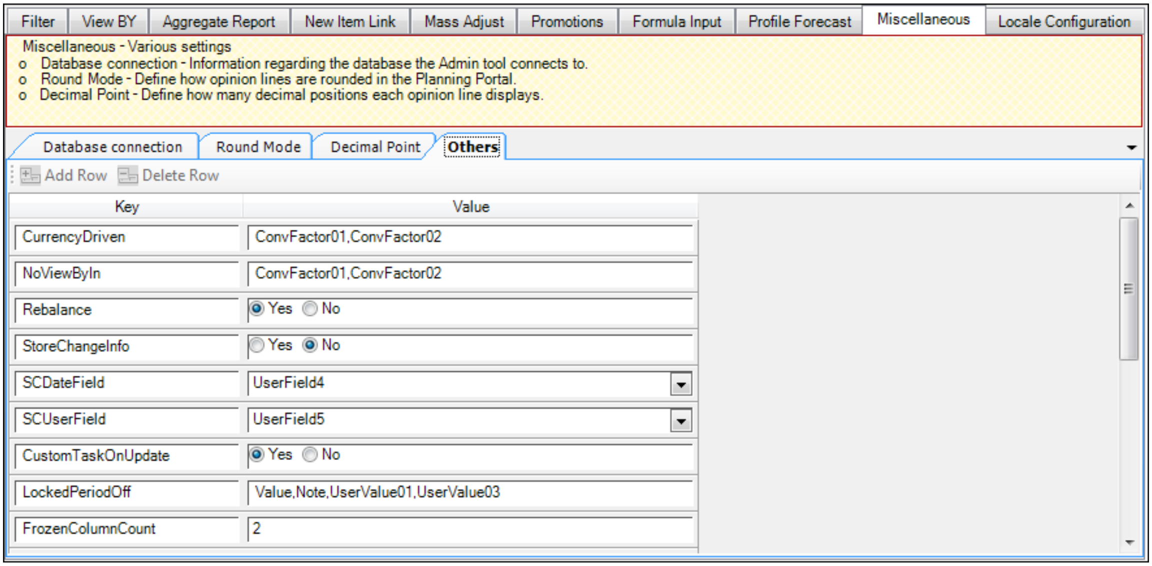
11-3: Decimal Point



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



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

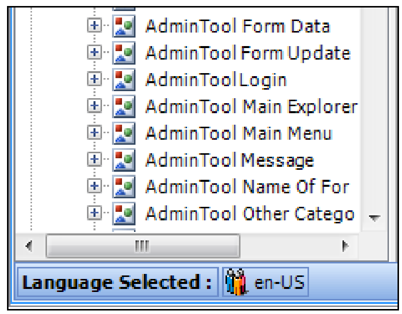
Key	Description
CurrencyDriven	Effected by currency.
NoViewByIn	Determines which fields are not affected by View By (conversion factor).
Rebalance	Causes changes to be distributed throughout if there is a hierarchy.
StoreChangeInfo	Determines if changes are to be tracked.
SCDateField	Field in series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

Key	Description
LockedPeriodOff	Disables the lock of certain fields from the last locked period.
FrozenColumn Count	Number of columns frozen in Detail or Classical views.
Logo Home Page 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.
Classic View Enabled	Radio buttons used to determine if the Classic View is enabled in the Planning Portal.
Summary View Enabled	Radio buttons used to determine if the Summary View is enabled in the Planning Portal.
Detail View Enabled	Radio buttons used to determine if the Detail View is enabled in the Planning Portal.
Summary Rebalanced Enabled	Radio buttons used to determine if the Summary Rebalance feature is enabled in the Planning Portal.
Detail Level Enabled	Radio buttons used to determine if the Detail Level is enabled in the Planning Portal.
Auto Save Enabled	Radio buttons used to determine if the Auto Saving feature is enabled in the Planning Portal.

Section 12: Locale Configuration

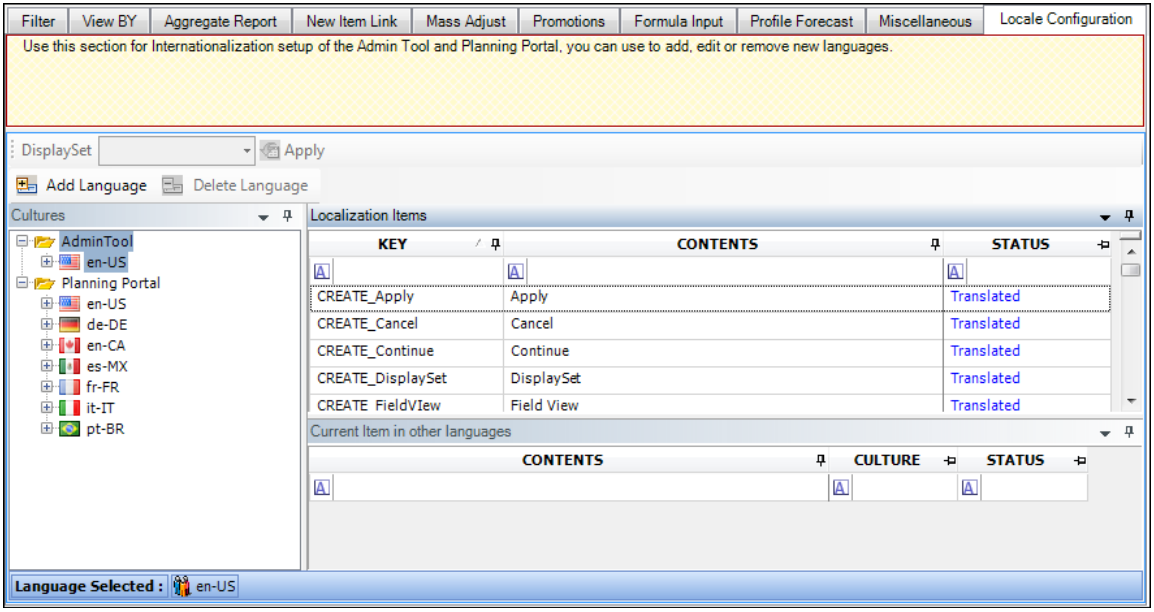
The Locale Configuration feature enables you to configure any localization setting for both the Admin tool and the Planning Portal. You will be able to configure any label within both applications, images and symbols within the tool. It includes support for non english characters from any language for labels, dates, currency symbols and more.

When working with the locale configuration window you can tell which language you are working on by looking at the indicator in the lower left corner of the pane:



Note: *Before making any changes to the locale configuration for the Planning Portal please make sure nobody is accessing the Portal.*

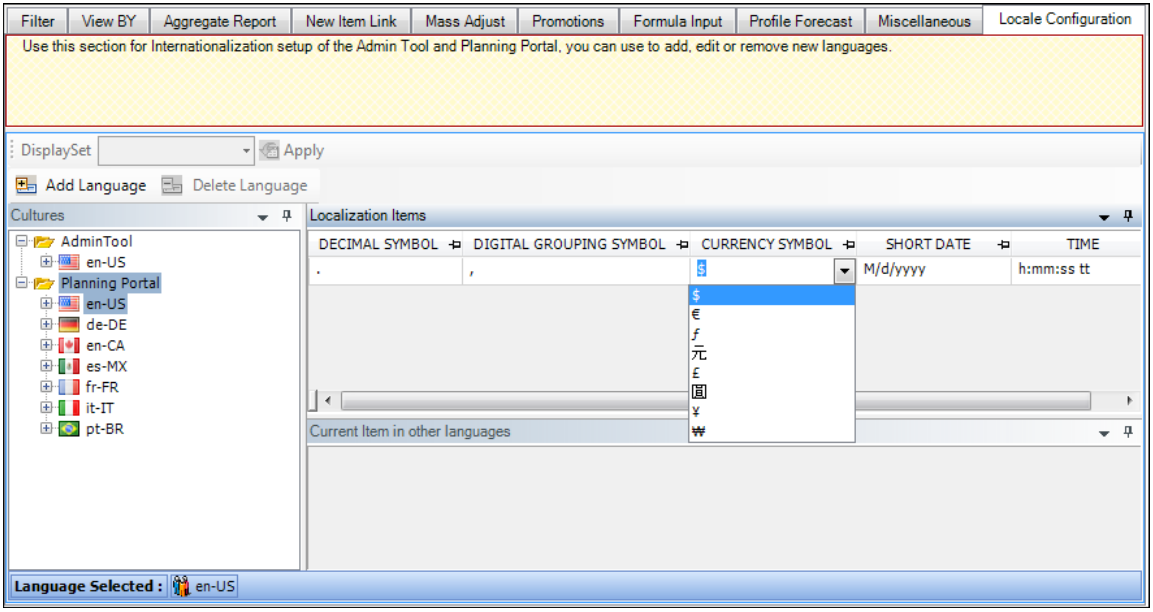
Note: *If you are having problems viewing certain characters like currency symbols in foreign languages you might need to install the MUI (Multilingual User Interface) pack. You can find more information here: http://msdn.microsoft.com/en-us/goglobal/bb688178.aspx*



12-1: Editing Existing Languages

You can edit an existing language by clicking on it's name. Make sure you choose the correct tool, languages under the Admin Tool will only affect this the Admin tool; if you wish to edit any labels or images for the Planning Portal select the appropriate language under the Planning Portal.

1. Click on the Language name to edit miscellaneous settings like the decimal and currency symbol.

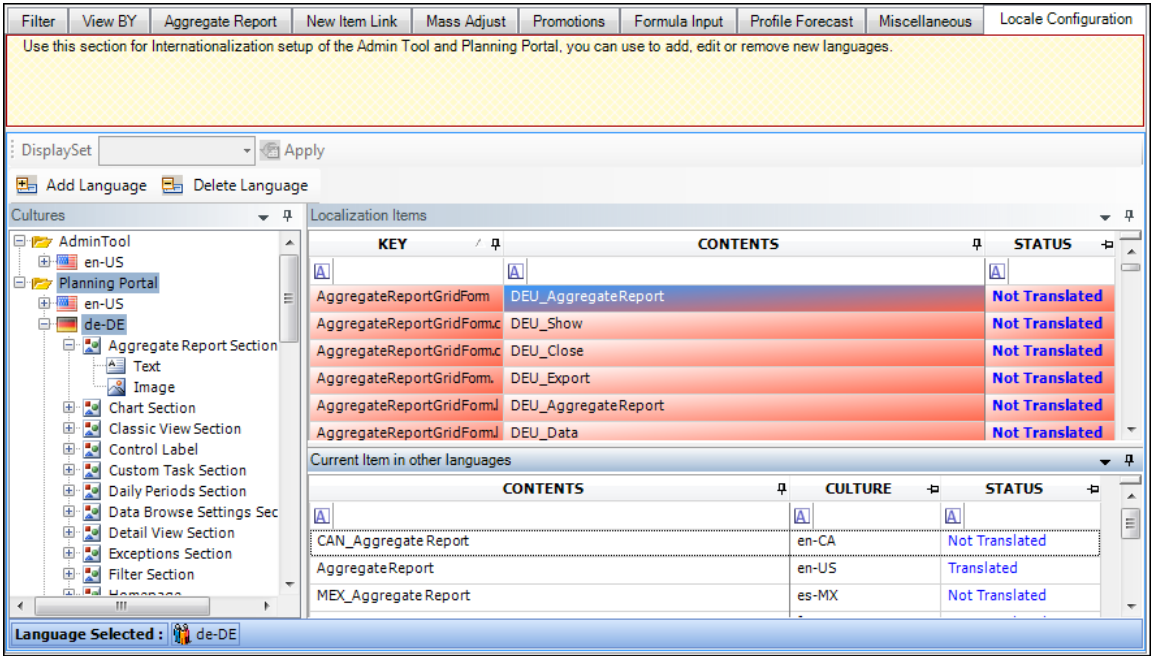


2. You can also change all the labels and images by expanding the language you wish to edit and go into the section you wish to change the Labels or images for.

   You can change a label by editing the **"Contents"** column, after you do so if you are editing a newly created language once you have changed the contents the Status column will change to "Translated" to indicate you have already translated that element. You can change the status of a whole tree section by right selecting the right one and right clicking on **"Text"** section under it and selecting the **"Change Status Translated"** this will set all keys in this group as translated.

   You can also edit the images used by selecting the **"Image"** option under the node you are trying to edit.

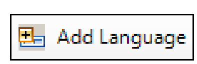
Note: *When changing any of the images remember the new images must be inside the folder where the Planning Portal was installed, this is* *the default location: C:\Inetpub\wwwroot\PlanningPortal\, preferably put your images in the images folder:*



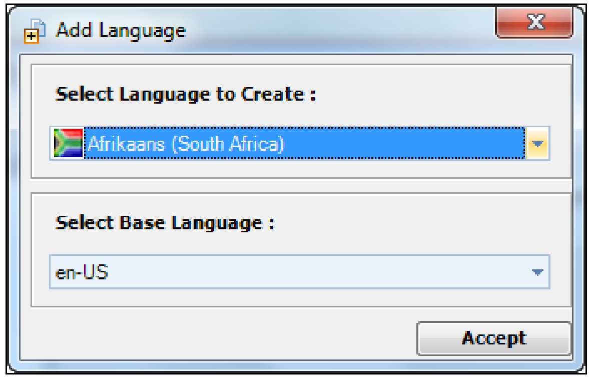
3. After making all the necessary changes you can click the  button to save any changes, and after restarting IIS those changes will affect the Planning Portal.

12-2: Add a New Language

You can create new languages to use in both the Administration Tool and the Planning Portal itself. Make sure you choose the correct tool, languages under the Admin Tool will only affect this the Admin tool; if you wish to edit any labels or images for the Planning Portal select the appropriate language under the Planning Portal.

1. Click on the Planning Portal folder and click the  button.

2. The Add Language window will display. Select the language you wish to add into the tool from the “Select Language to Create” drop-down.



3. Select any language already in Planning Portal to use as a base for the new language.

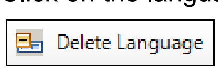
4. Click the “Accept” button

5. After adding you new language it will show up in the list under the application for which you added the new language. Now you can start configuring your new language, for mor information see “Editing Existing Languages” on page 79.

12-3: Delete an Existing Language

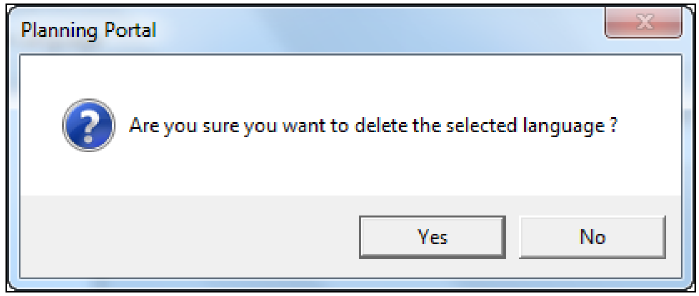
You can delete languages created for both the Administration Tool and the Planning Portal itself. Make sure to select the correct tool from the Cultures tree in the left panel. Languages under the “Admin Tool” branch will only affect the language used in the Admin tool. If you wish to edit any labels or images for the Planning Portal, select the appropriate language under the “Planning Portal” branch of the tree.

Note: *The language en-US (English - United States) cannot be deleted for both the Admin Tool and the Planning Portal.*

1. Click on the language you wish to remove and click the 

button.

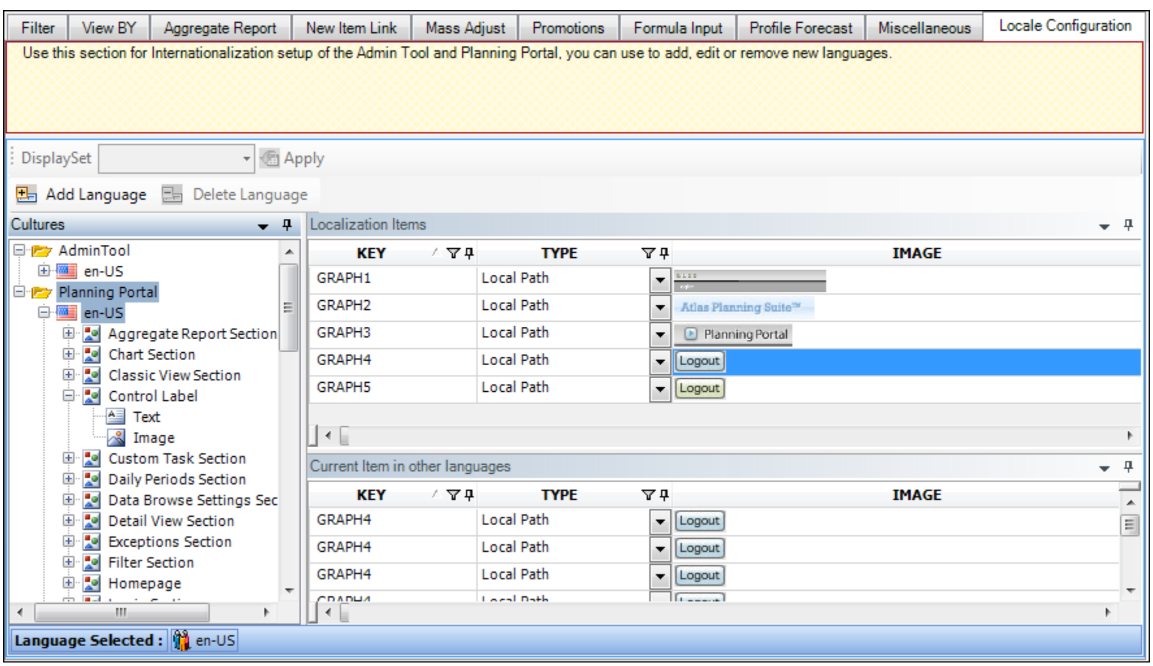
2. A message box is displayed asking you to confirm the deletion. Click "Yes" to delete the currently selected language.



12-4: Images Locale

1. The tree structure for each language contains a listing of the screens available in the application. Expand the node and select the Images option.

   The images available on the selected screen will display in the Localization Items panel to the right.



2. Select the image from the Localization Items list. The corresponding item in other languages will display in the lower panel for reference.

3. Edit the images as necessary.

   The table below details what each text box means.

Text Box	Description
Key	Description of the image.
Type	Drop-down used to select if the image is a Local File or displayed from a URL.
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 column.

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.*

Section 13: Tools

This section describes certain features of the PP Admin Tool that are available under the Tools menu.

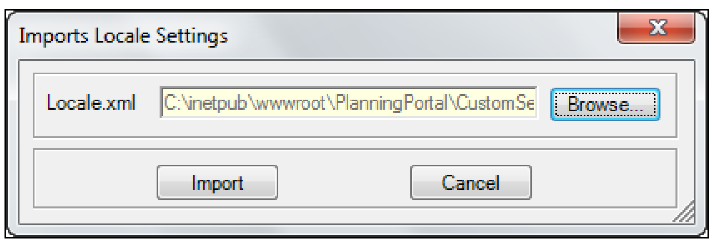
13-1: Restore Default Settings

This option will reset all settings in the PP Admin Tool to the originals, it will be as if you just installed the application and nothing had been customized.

Note: *All system configurations will be lost when using this option, if you have not backed up your system configuration files it will not be possible to go back to your previous settings.*

13-2: Import Locale Settings

If you had created a customized locale setting in a previous version of the PP, after upgrading you will be able to import it back into the application.



Locale setting includes configuration settings for labels, images and other settings related to language configuration in the PP.

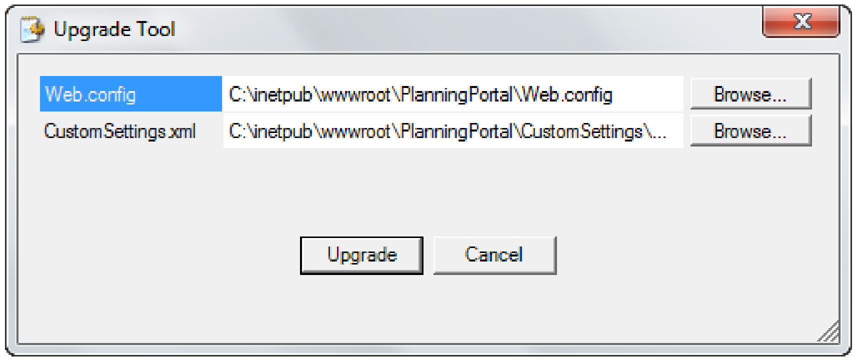
Click the **Browse** button to locate your old “Locale.xml” file which should have been saved before un-installing the previous version of the PP.

Click **Import** to save your changes.

Note: *This version of the PP can upgrade configurations files from version 3.6.04.26 and higher only; backup the current data and settings if you try to move to this version from any version lower than the mentioned above.*

13-3: Upgrade Tool

When performing an upgrade from older version you can reload all you old customized settings, Data Views, Field Views, User permissions and more using this tool.



Click browse to locate your old configuration files: **Web.config** and **CustomSettings.xml**. Then click upgrade to save your changes.

If you have changed the server hardware specifications in anyway you might get an invalid license error and will need to call in to get a new license. For more information on installing a license see 6-4: Planning Portal License36.

Note: *This version of the PP can upgrade configurations files from version 3.6.04.26 and higher only; backup the current data and settings if you try to move to this version from any version lower than the mentioned above.*

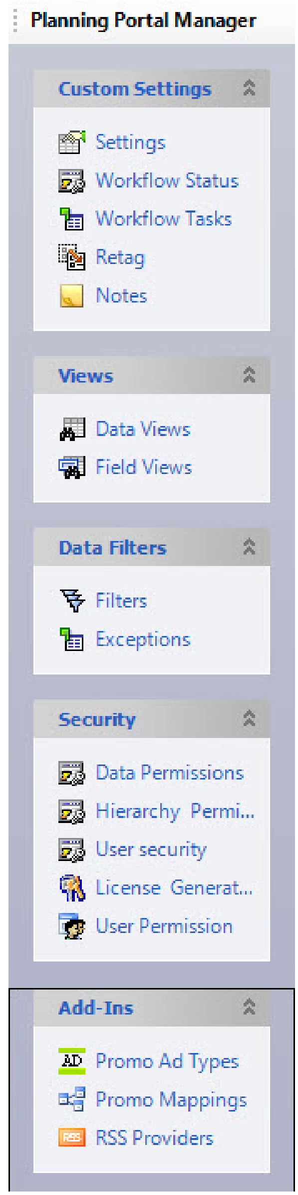
Chapter 4 Advanced Configuration

This chapter includes:

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, Field 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.

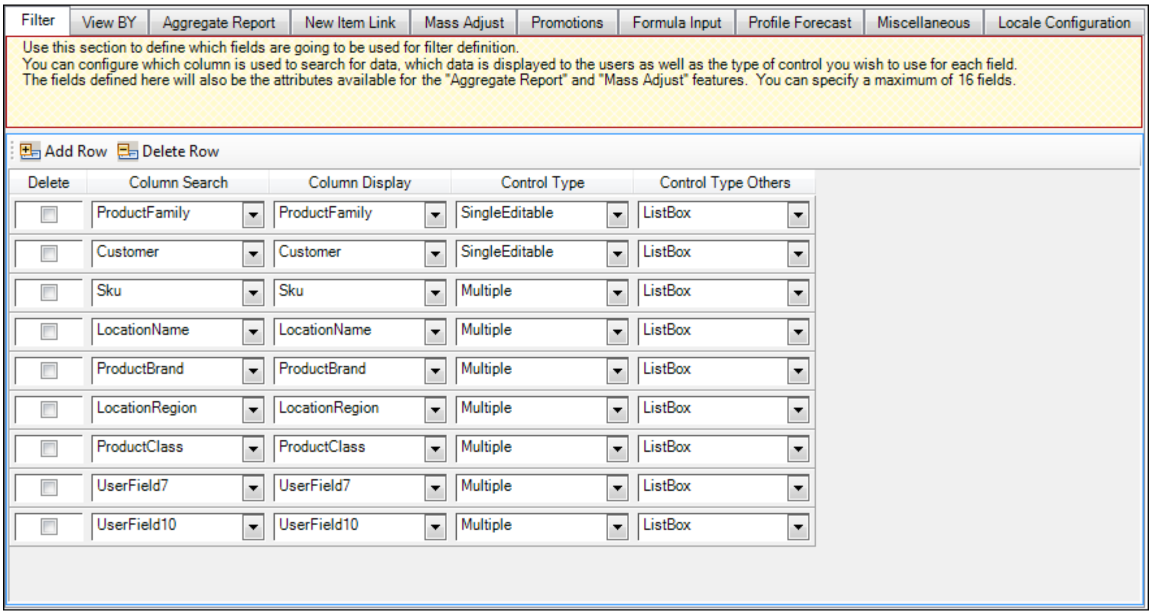
The depiction below is the Planning Portal Manager of the PP Admin Tool.


Planning Portal Manager
Custom Settings
Settings
Workflow Status
Workflow Tasks
Retag
Notes
Views
Data Views
Field Views
Data Filters
Filters
Exceptions
Security
Data Permissions
Hierarchy Permi...
User security
License Generat...
User Permission
Add-Ins
Promo Ad Types
Promo Mappings
RSS Providers

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.

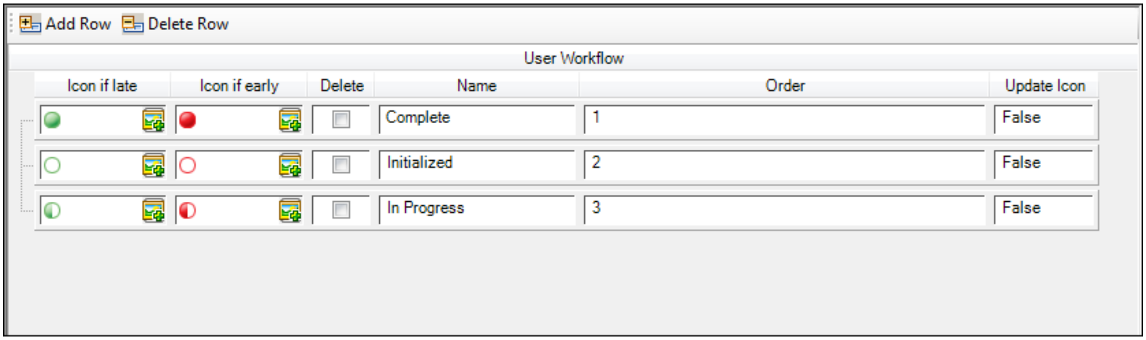


For more information on these tabs, please refer to Chapter 3: "Configuration" on page 51

2-2: Workflow Status

The Workflow feature allows users to communicate their status for the current forecast to others, as well as view the status of other users. This section of the admin tool is used to manage the different statuses available to users for the Workflow feature. The default status options are

“Initialized”, “In Progress”, and “Complete”. Any number of statuses can be added.



The “Icon if Late” and “Icon if Early” columns are used to select the icon that will display for workflow items with this Status in PP. Click the icon to select the graphic to use as the icon representing the Status.

2-2-1: Add a New Status

1. Click the Add Row button.

   A new empty row is added to the bottom of the list.

2. Enter a **Name** and change the **Order** column if it should precede any of the existing ones.

2-2-2: Edit an Existing Status

1. Change the **Name** or **Order** for the record you need to edit and click the button to save your changes.

2-2-3: Delete an Existing Status

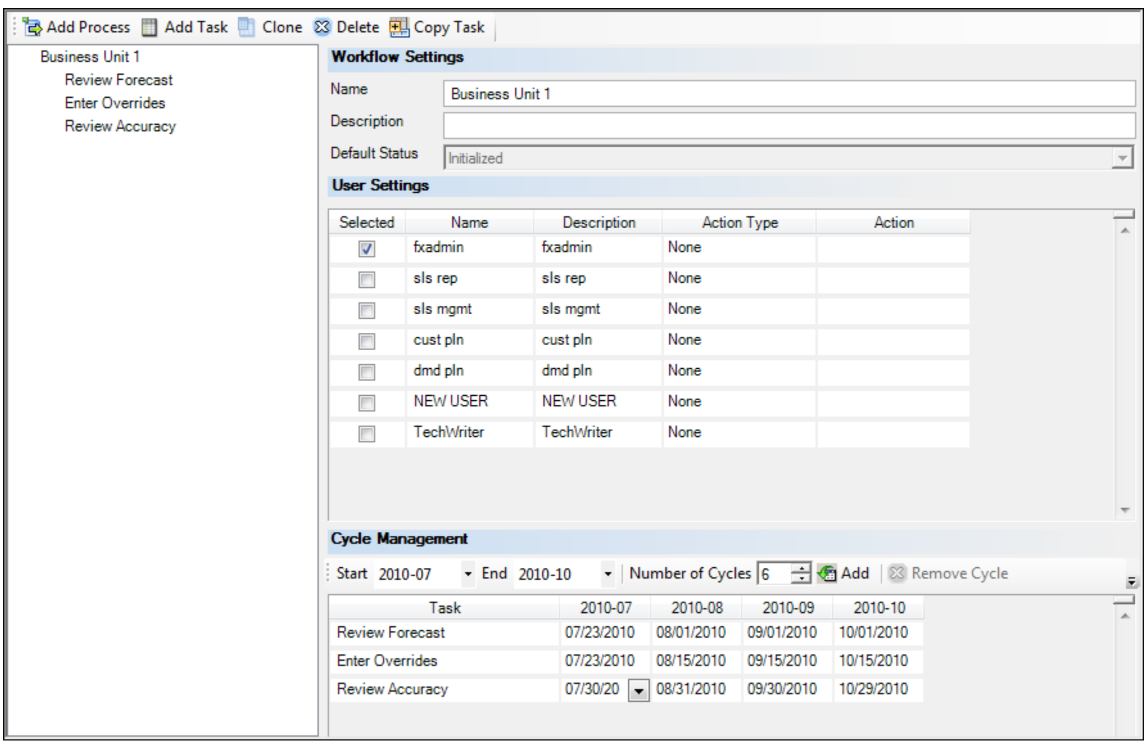
1. Select the checkbox next to the name of the record you wish to delete and click the 

button to remove it.

The selected Status is deleted immediately.

2-3: Workflow Tasks

The Workflow Tasks option allows you to create new processes for the workflow, as well as create the individual tasks in the process. Once the tasks have been created, they can be assigned a due date and then delegated to specific users..

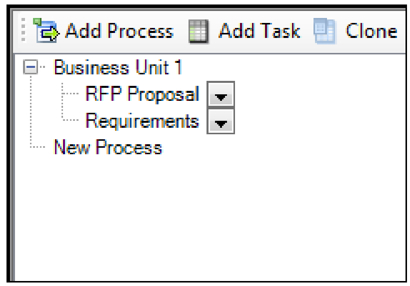


2-3-1: Creating a Process

1. Click the 

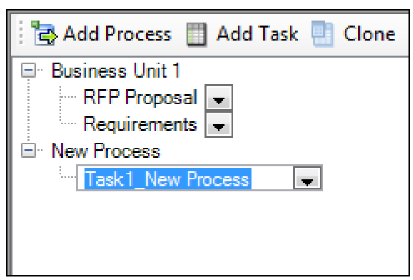
button and a new process is added to the bottom of the tree.

2. Enter a name for the new Process being created.



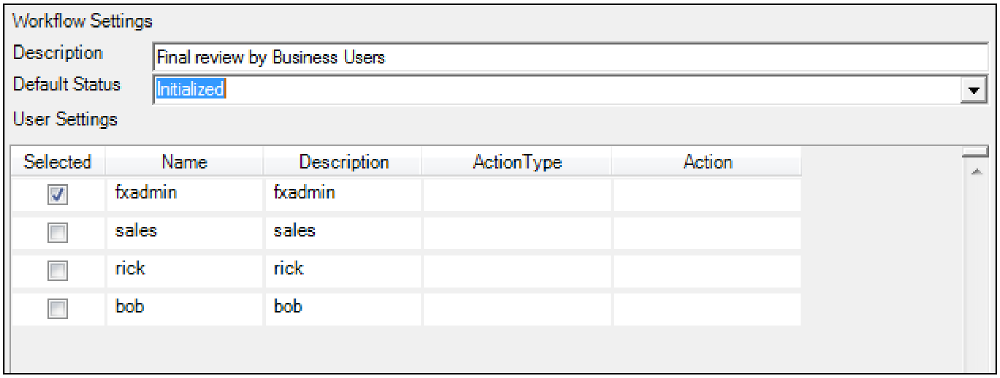
3. Click the 

button. A new task is added to the process.



4. Enter a name for the task being added or click the drop-down arrow to select an existing task.

5. In the Workflow Settings panel, enter a Description for the new task.

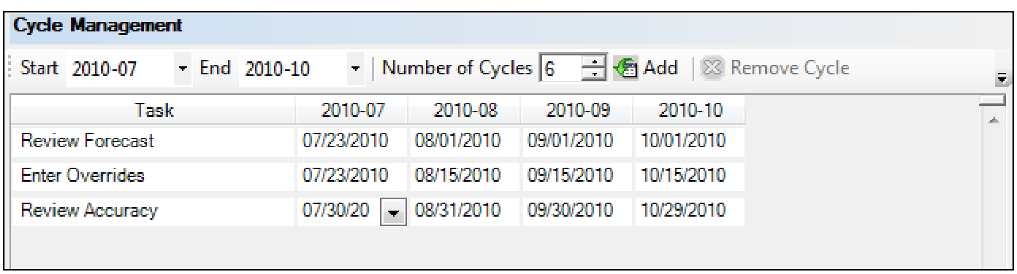


6. Select the Default Status for this task from the drop-down list. The default setting is “Initialized”, but you can select any Workflow Status to assign to this task.

7. In the User Settings table, use the check boxes in the Selected column to indicate the users being assigned to the task.

8. In the Cycle Management panel, use the “Number of Cycles” field to indicate the number of periods to add to this task.

9. Click the **Add** button. The current task is added to the grid below followed by the selected number of monthly periods.



10. The Start and End fields are used to select the range of periods that are displayed in the Cycle Management grid.

11. Click on the field for each period to select the due date for that task.

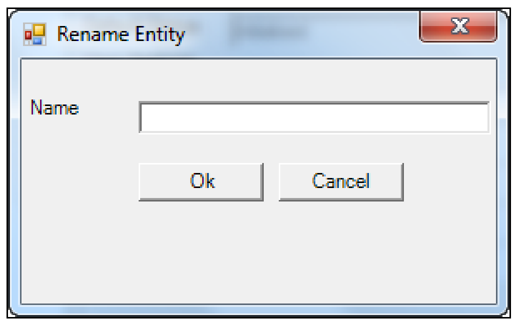
12. Click the **Save** button when finished to assign these tasks to the selected users.

2-3-2: Clone an Existing Process

Cloning allows you to create a copy of an existing process or task to use as a base for a new process. By cloning, you can re-use an existing process without having to recreate it. Once cloned, you can make any necessary changes to the names, tasks, or due dates.

1. Select the process to clone from the tree.
2. Click the 

button.
3. The **Rename Entity** window displays. Enter a name for the new process and click **OK**.



4. The new cloned process is added to the tree and can be modified as necessary.

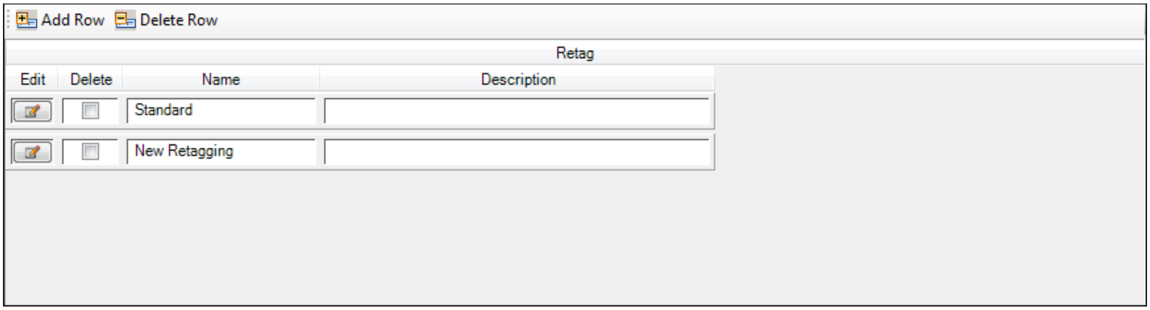
2-3-3: Delete a Process

1. Select the process to delete from the tree.
2. Click the 

button.
3. The selected process and any tasks contained within it are deleted and no longer display in the tree.

2-4: Retag

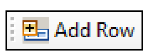
This section of the Admin tools is used to setup Retag settings.



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.

2-4-1: Add a Retag

1. Click the 

button.

   A new row is added to the bottom of the list.

2-4-2: Delete a Retag

1. Select the Delete checkbox next to the row to delete and click on the 

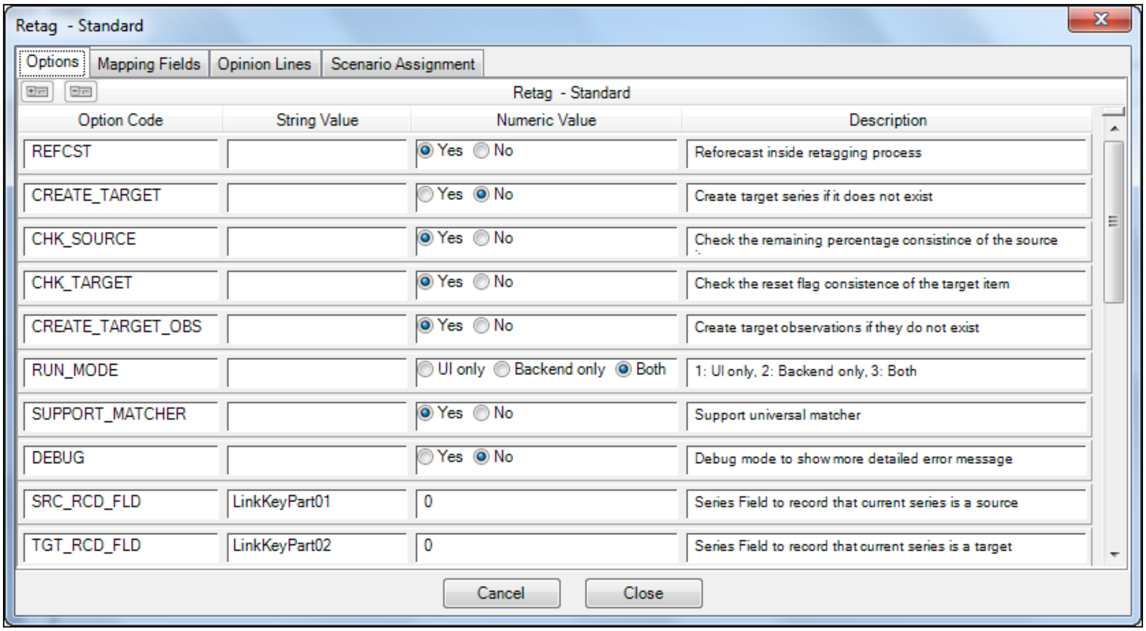
button.

   The row is deleted from the list.

2-4-3: Edit a Retag

1. Click on the  button at the beginning of the row for the Retag you want to edit.

   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_TARGET	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.

Table 4-1: Options tab

Option Code	Description
CREATE_TARGET_OBS	Create target observations if non-existent.
RUN_MODE	Three options: ■ UI only - User Interface ■ Backend only - Backend ■ Both - User Interface and Backend
SUPPORT_MATCHER	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.
REFCST_FLD	Series field to record that the current series needs to be reforecasted.

Table 4-2: Mapping Fields

Column	Description
Retag Field	Uneditable. QAD use only.
Engine Field	Attributes linked.
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: ■ Historic ■ Future ■ Both (historic and future)
Note	Additional notes, if necessary.

3. On 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.

2-5: Notes

Users have the ability to save notes in series while viewing their data with or without hierarchies. This section of the Admin tool has certain settings regarding the Notes feature in the PP.

2-5-1: General

This section contains general settings regarding the notes feature:

Feature	Description
Mandatory note entry before saving changes	When this option is enabled, all users logging into the PP will be required to enter a note whenever they make any changes to any data lines or attributes.

2-5-2: Reason Codes

Whenever users enter a note into the application there are several reasons why this note could have been added. In this section of the Admin Tool you can configure which reasons will be available for the notes feature. Reason codes can be useful for reporting types of notes entered at the series level such as customer information, promotion, product phase out, etc. Upon installation, the only reason available is “Default”, there is no limit to the number of reasons you can define.

2-5-3: Add a New Reason

1. Click the Add New Row button.

   A new empty row displays at the bottom of the list.

2. Enter a **Reason Code.**

2-5-4: Edit a Reason

1. Change the **Reason Code** for the record and click the **Save** button.

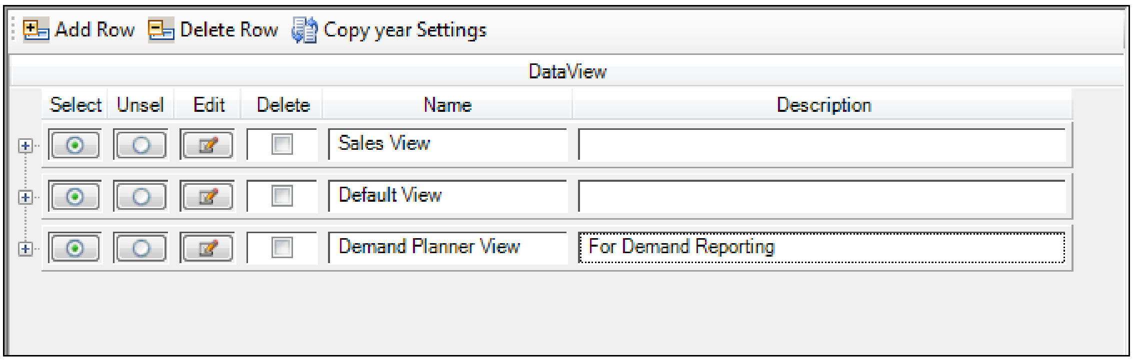
2-5-5: Delete a Reason

1. Enable the checkbox next to the Reason Code of the record you wish to delete and click on the Delete Selected Rows button to remove it.

Section 3: Views

3-1: Data Views

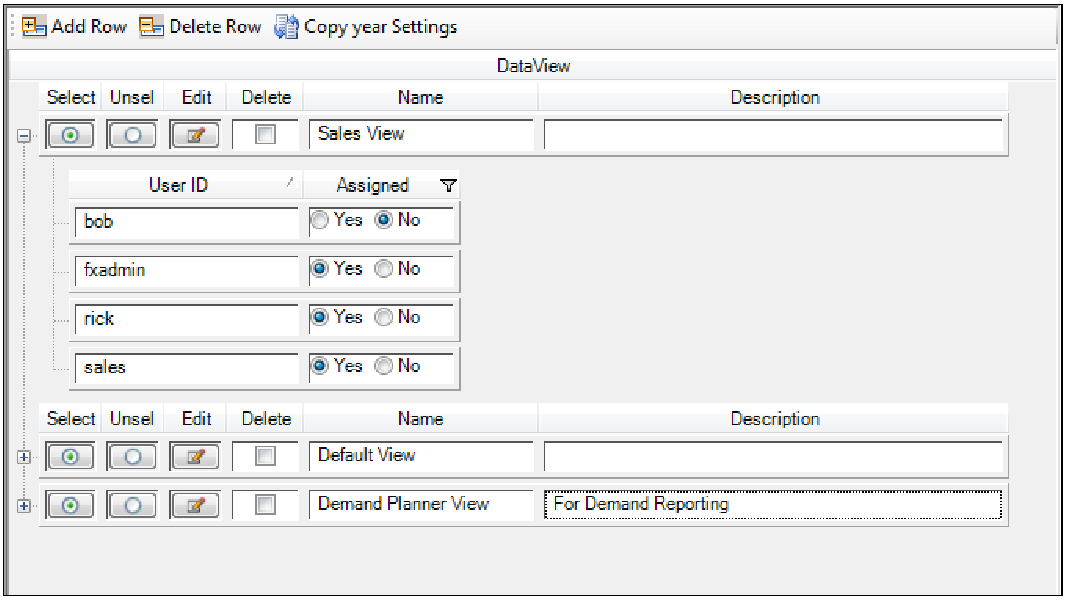
The Data Views feature defines which Opinion Lines are displayed and within which time frame. This section also defines if the data lines will be editable or read-only, the order in which they will be displayed and others.



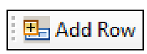
The table below details the types of configurations that can be used:

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

You can expand the Data View using the  button to view which users have access to the Data View or manually assign it to users, for more information on how to assign a Data View to users see "Assign Data View to Users" on page 105.



3-1-1: Add a Data View

1. Click the  button.

   A new row is added to the bottom of the list.

2. After you add the new bucket you can give the Data View a **Name** and a **Description;** after you this you can edit the newly created Data View, more information on how to edit a Data View can be found here "Edit a Data View" on page 102.

3-1-2: Delete a Data View

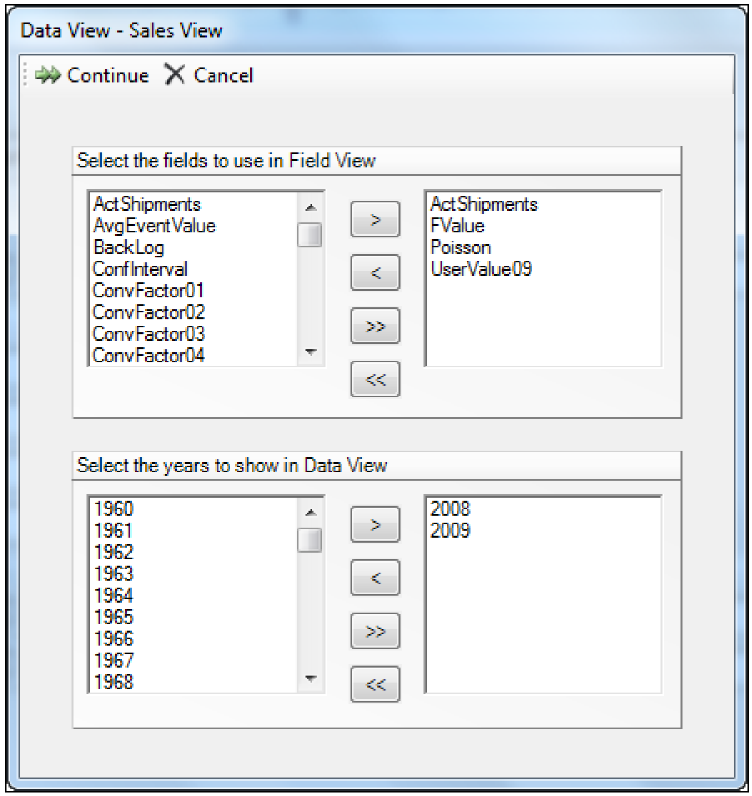
1. Select the **Delete** checkbox next to the Data View name and filter to delete and click the  button.

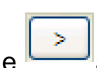
   The selected Data View will be deleted from the list.

3-1-3: Edit a Data View

1. Click on the  button for the record you want to edit.

   The selected Data View window displays.

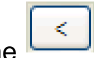


2. Select the fields to be used in Data View and click on the  arrow.

   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 

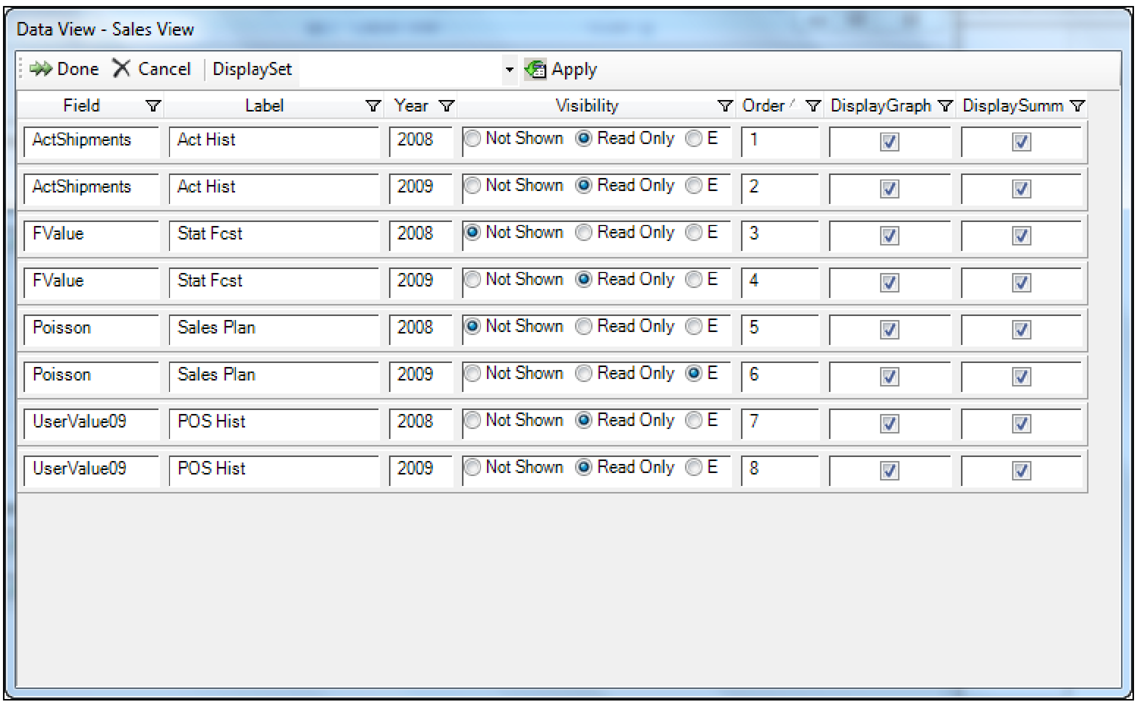
or 

arrows.

5. Click the 

icon.

   The Data View window is displayed.



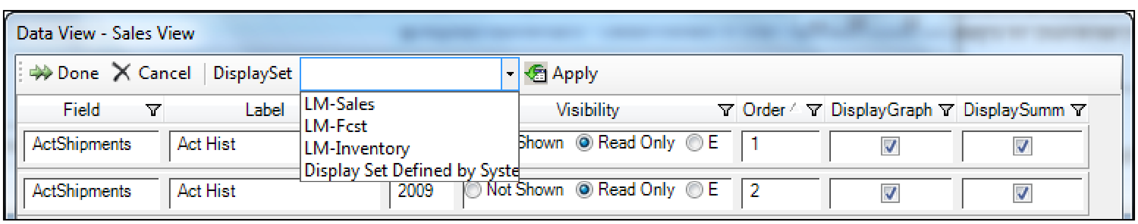
6. Edit as necessary. The table below details each column.

Column	Description
Field	Opinion Line that is selected.
Label	Description of Opinion Line. Changes to reflect display set aliases if a display set is selected.

Column	Description
Visibility	Determines if the display line is shown, Read-Only, or editable.
Order	Determines in what order the Opinion Lines will be displayed in the PP grids.
DisplayGraph	Determines if the Opinion Line displays in Graph View.
DisplaySummary	Determines if the Opinion Line displays in Summary View.

7. You can define the labels for each field manually by changing the **Label** column or you can use a **Display Set** to automatically populate the labels from the Display Set. Pick a Display Set from the drop down list and click on the **Apply** button, all the labels in the Data View will be replaced with the Aliases used in the selected Display Set.

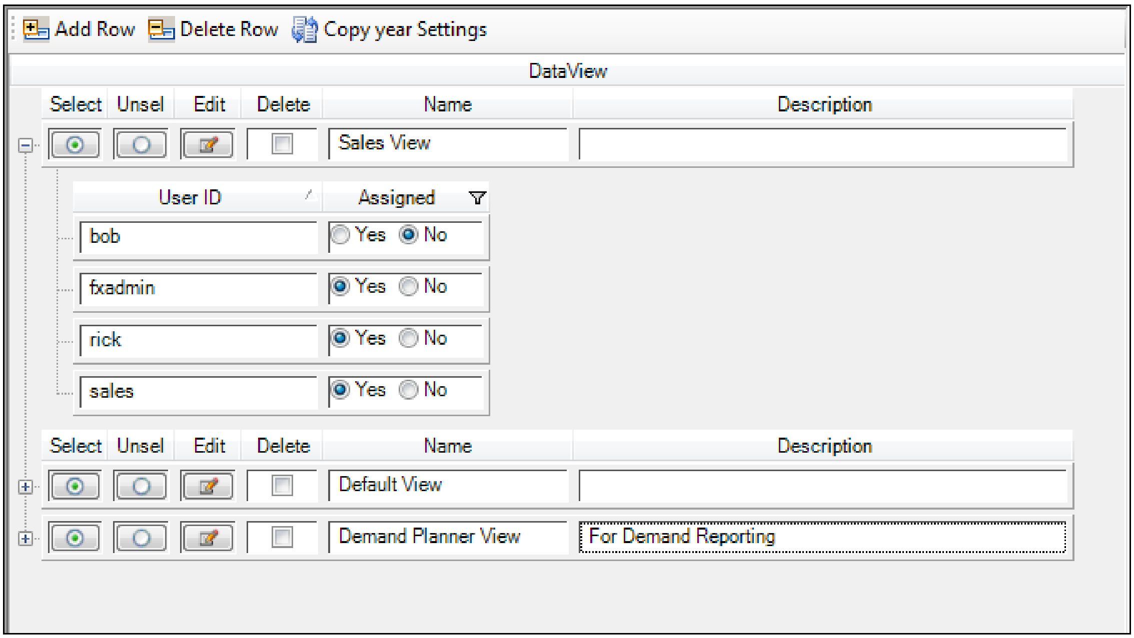
Note: *Display Set and Data Views are not synchronized, if any of the alias in the Display Set change after they have been applied to a Data View you will have to re apply them to the Data View in order to reflect the changes made to the Display Set.*



8. Click **Done** when finished.

3-1-4: Assign Data View to Users

After you have created your Data View you can choose which users will have access to it. You can expand the Data View using the button to view which users have access the Data View as well as change each user's access to the Data View.



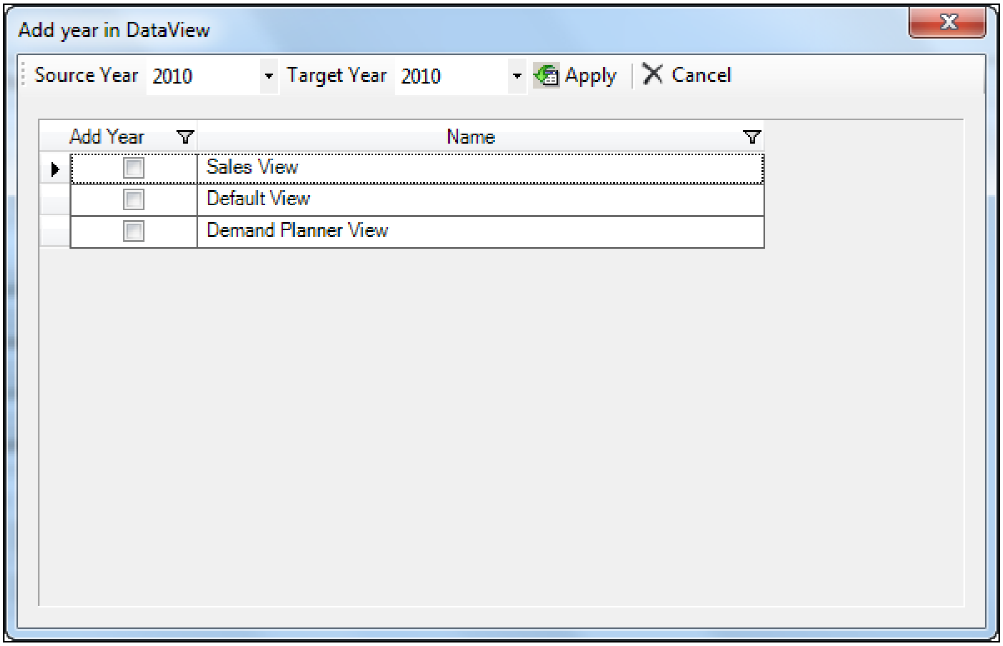
If you would like to give all users access to the Data View, click the button under the **Select** column. Conversely, if you would like to remove all users access to the Data View, click the button.

3-1-5: Copy Year Settings

Date Views must specify which opinion lines or data lines will be available and also a time frame, the specific years for which the data will be displayed; for example a Data View could display data for three years: 2007, 2008 and 2009. If the year 2010 was to be added this would have been a manual process, the copy year feature allows to copy settings for a specific year, let's say 2008 and use it to create settings for a new year like 2010.

Click on the 

button and the **Add year in Data View** window will be displayed

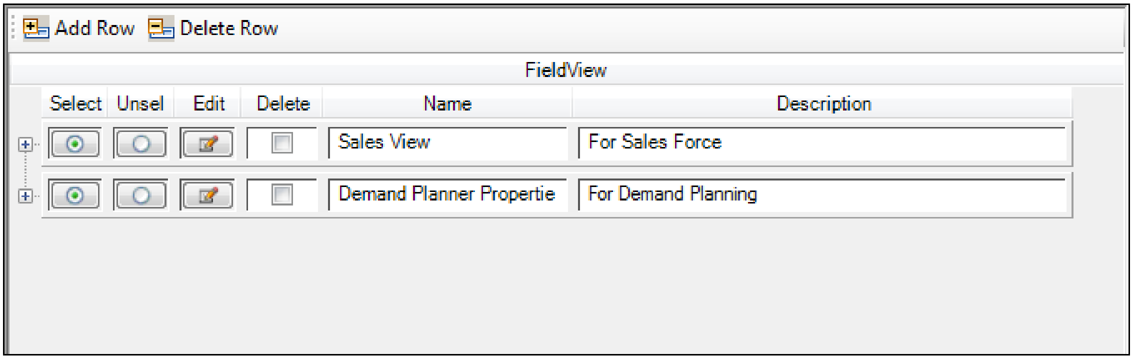


After this you need to pick the **Source Year** and **Target Year** from the drop down list. Enable the check box under the **Add Year** column next to the Data View you wish to add the settings for and click the **Apply** button.

In this example the “Demand Planner View” Data View will be changed, settings for year 2010 will be created using the settings for year 2009 as the template.

3-2: Field Views

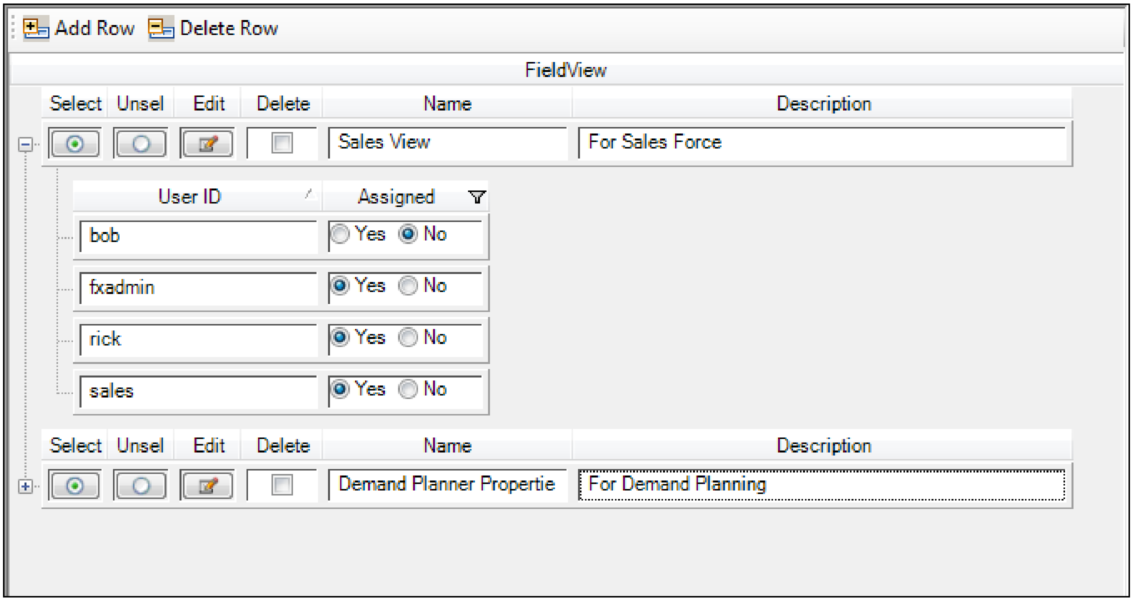
The Field Views feature defines which attributes display in different views. It is also where it is determined if they are editable, Read-Only, as well as in which views available.



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 using the ⊞ button to view which users have access to the Field View or manually assign it to users, for more information on how to assign a Field View to users see “Assign Field View to Users” on page 112



3-2-1: Add a Field View

1. Click on the 

button.

   A new Field View displays at the bottom of the list.

2. Enter a **Name** and optionally a **Description** for the new Field View; after you this you can edit the newly created Field View, more information on how to edit a Field View can be found here “Edit a Field View” on page 109

3-2-2: Delete a Field View

1. Select the **Delete** checkbox next to the Field View name and filter and click the 

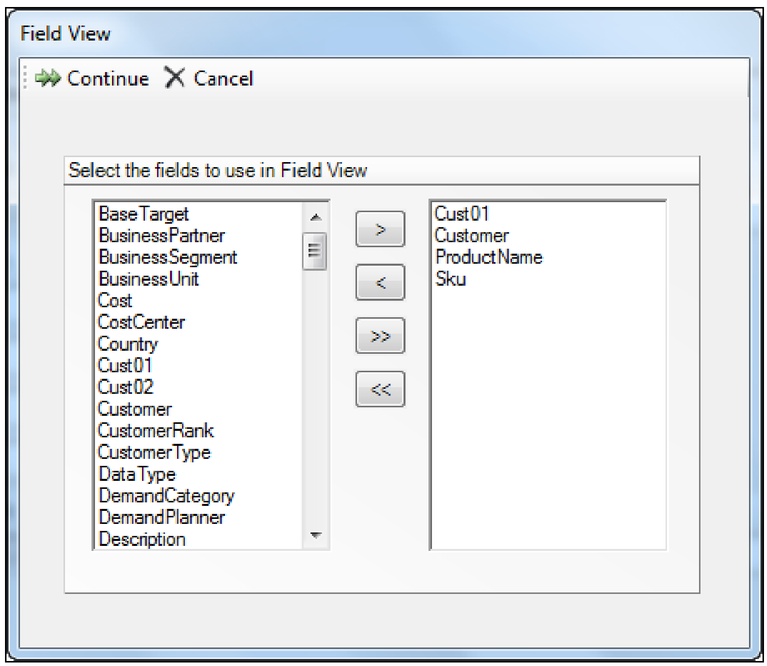
button.

   The selected Field View will be deleted from the list.

3-2-3: Edit a Field View

1. Click on the  icon.

   The selected Field View window displays.



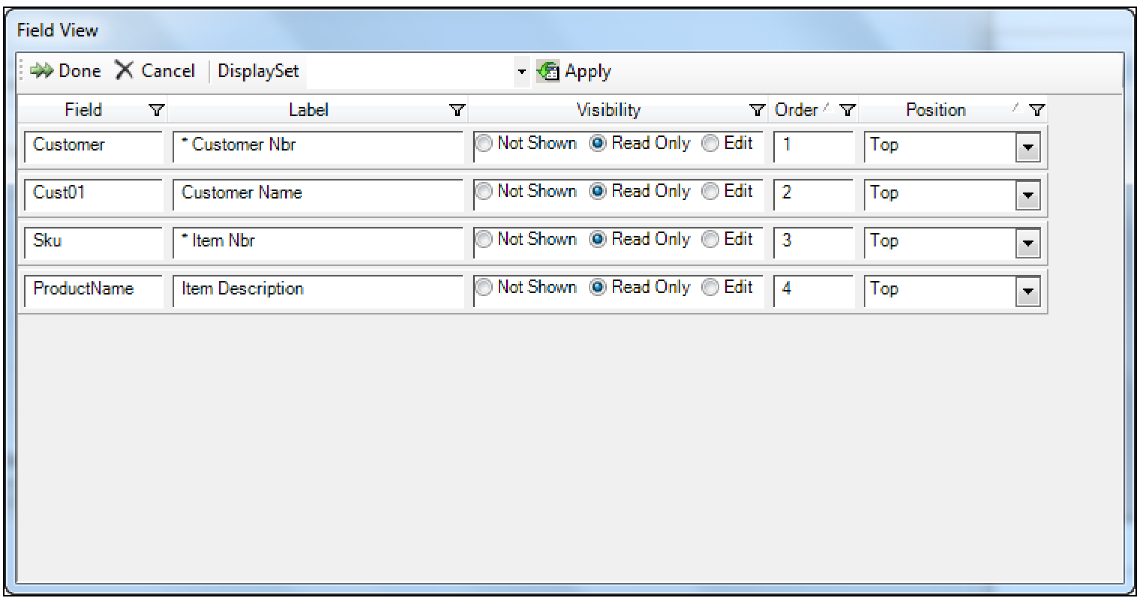
2. Select the fields to be used in Field View and click on the  arrow.

   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  button.

   The Field View window displays.



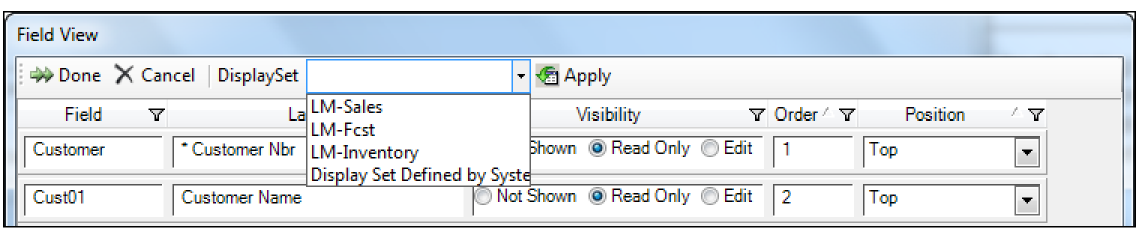
4. Edit as necessary. The table below details each column.

Column	Description
Field	Attribute that is selected.
Label	Description of Attribute. Changes to reflect display set aliases if a display set is selected.

Column	Description
Visibility	Determines if the attribute is shown, Read-Only, or editable.
Order	Determines in what order the attributes are displayed in the PP grids.
Position	Applies to Classic View. Determines where the attribute is displayed in relation to the data. **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.

5. You can define the labels for each field manually by changing the **Label** column or you can use a **Display Set** to automatically populate the labels from the Display Set. Pick a Display Set from the drop down list and click on the **Apply** button, all the labels in the Field View will be replaced with the Aliases used in the selected Display Set.

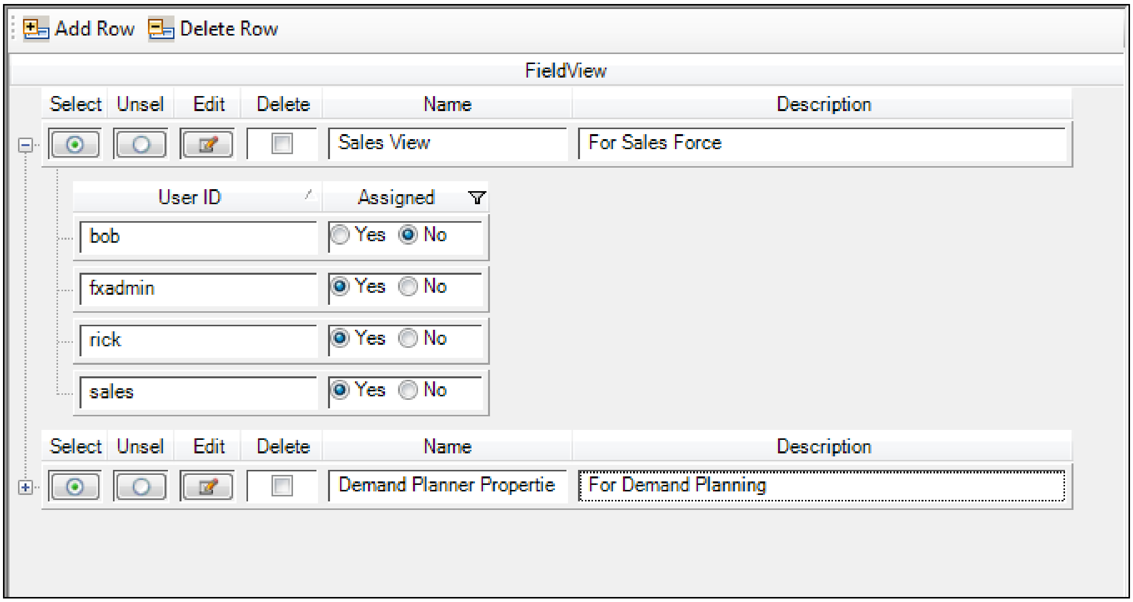
Note: *Display Set and Field Views are not synchronized, if any of the alias in the Display Set change after they have been applied to a Field View you will have to re apply them to the Field View in order to reflect the changes made to the Display Set.*



6. Click **Done** when finished.

3-2-4: Assign Field View to Users

After you have created your Field Views you can choose which users will have access to it. You can expand each Field View using the button to view which users have access the Field View as well as change each user's access to the Field View.



If you would like to give all users access to the Field View, click the button under the **Select** column. Conversely, if you would like to remove all users access to the Field View, click the button.

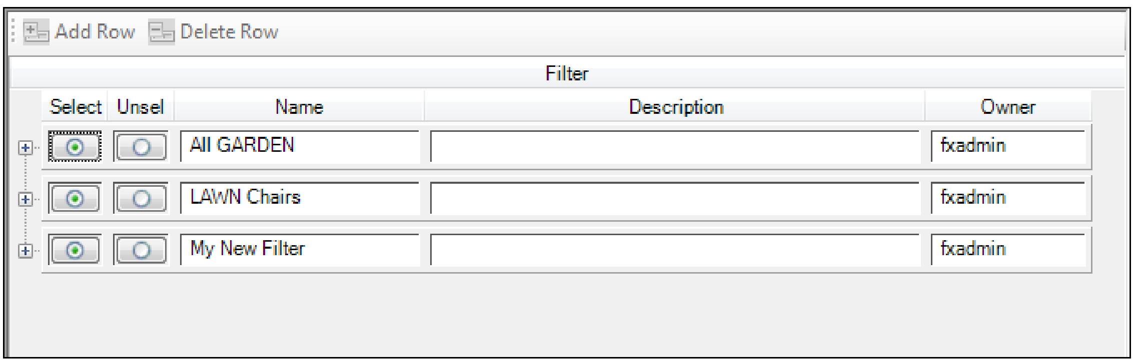
Section 4: Data Filters

This section contains settings and configurations regarding Filters and Exceptions.

4-1: Filters

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

Note: *Filters cannot be created or edited with the PP Admin Tool. Filters must be created in the DME Viewer or Planning Portal.*



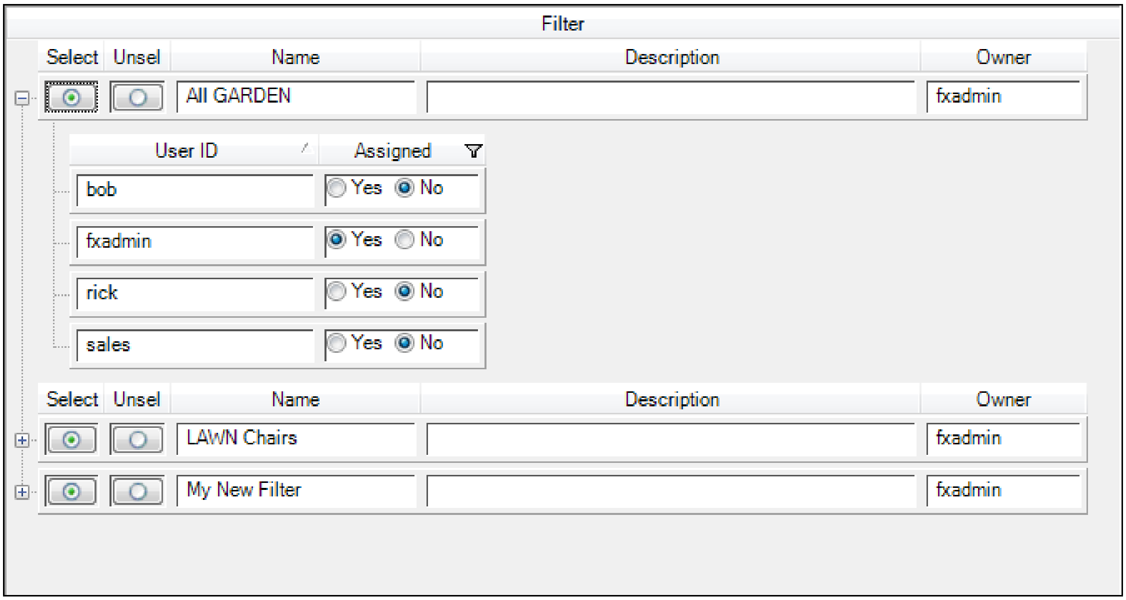
You can expand the Filter using the  button to view which users have access to the it and manually assign it to users, for more information on how to assign a Data View to users see “Assign Data View to Users” on page 105

The table below details the columns that are displayed for each Filter:

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

4-1-1: Assign Filter to Users

You can choose which users will have access to Filters; you can expand each Filter using the  button to view which users have access to it as well as change each user's access to the Filter.

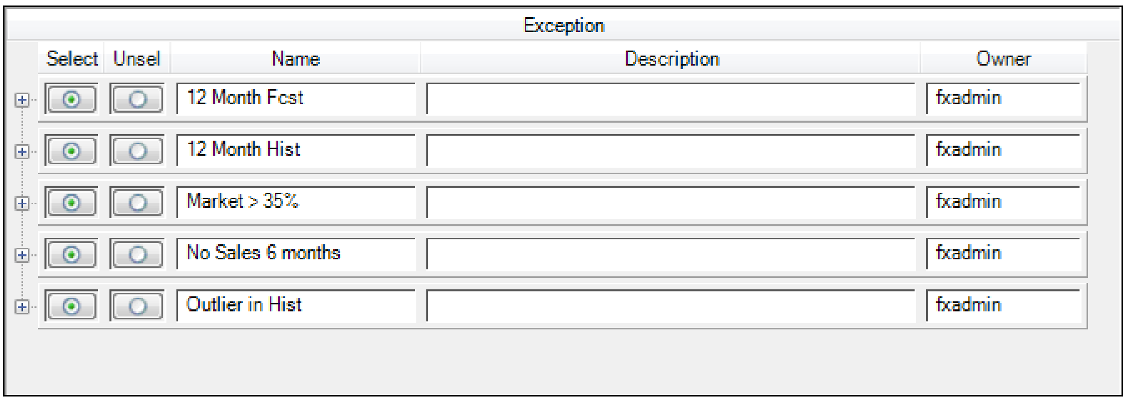


If you would like to give all users access to the Filter, click the  button under the **Select** column. Conversely, if you would like to remove all users access to the Filter, click the  button.

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.

Note: *Exceptions cannot be created or edited with the PP Admin Tool, they must be created in the DME Viewer.*

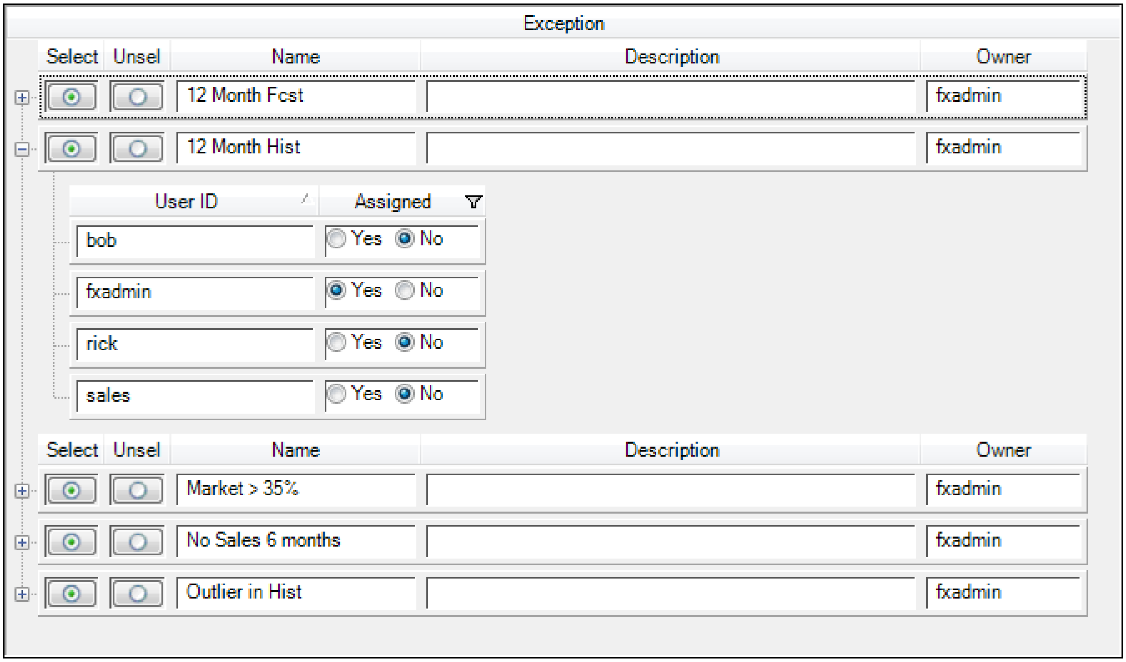


The table below details the columns displayed for created exceptions:

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

4-2-1: Assign Exceptions to Users

You can choose which users will have access to each Exception; you can expand each Exception using the button to view which users have access to it as well as change each user's access to the Exception.

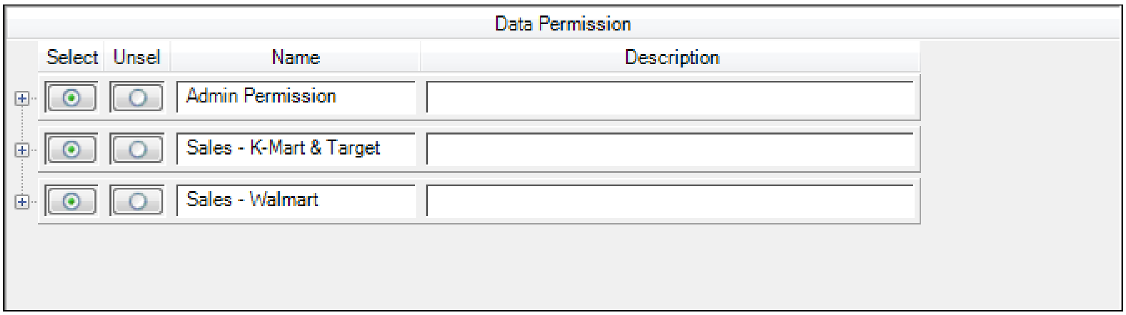


If you would like to give all users access to the Exception, click the button under the **Select** column. Conversely, if you would like to remove all users access to the Exception, click the button.

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.

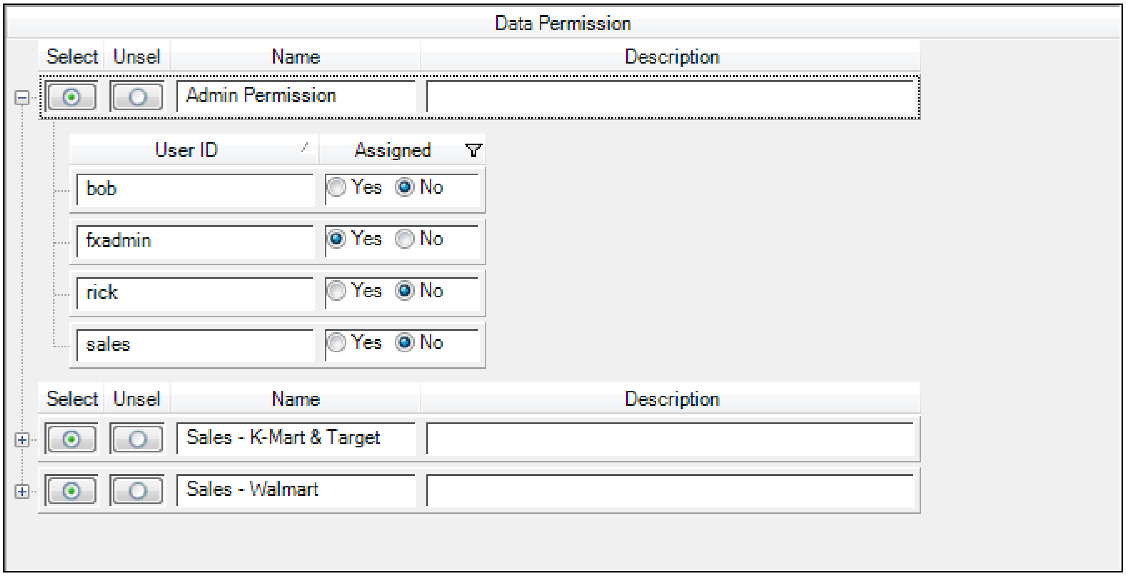


The table below details the types of configurations that can be used:

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: Hierarchy Permission

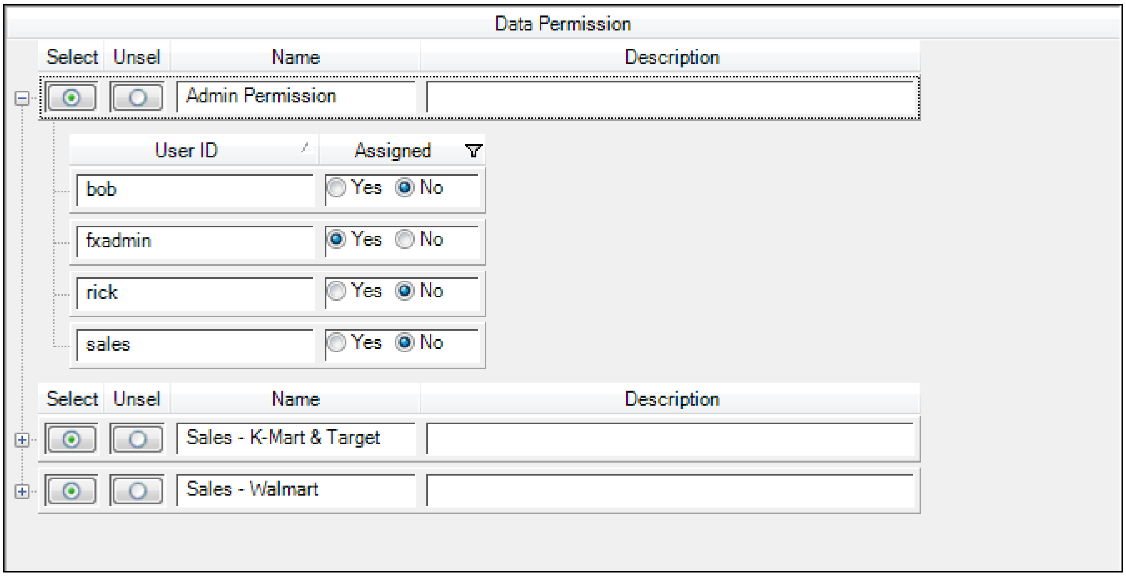
This section of the Admin Tool is used to allow or restrict user's access to hierarchies.

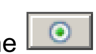
Note: *Only hierarchies applied to scenarios that are available in the PP will be displayed in this section.*

Note: *Only hierarchies that have been applied using the On-fly hierarchy options that contain a valid Base will be displayed. In order to create or recreate a valid base for a hierarchy, the owner of a scenario must log in to the scenario using the On-fly hierarchy options. Then select the "Recreate Base" check box in the DME Viewer using the hierarchy for which they want to recreate the Base.*

5-2-1: Assign Hierarchy to Users

You can choose which users will have access to each Hierarchy; you can expand each Hierarchy using the  button to view which users have access to it as well as change each user's access to the Hierarchy.

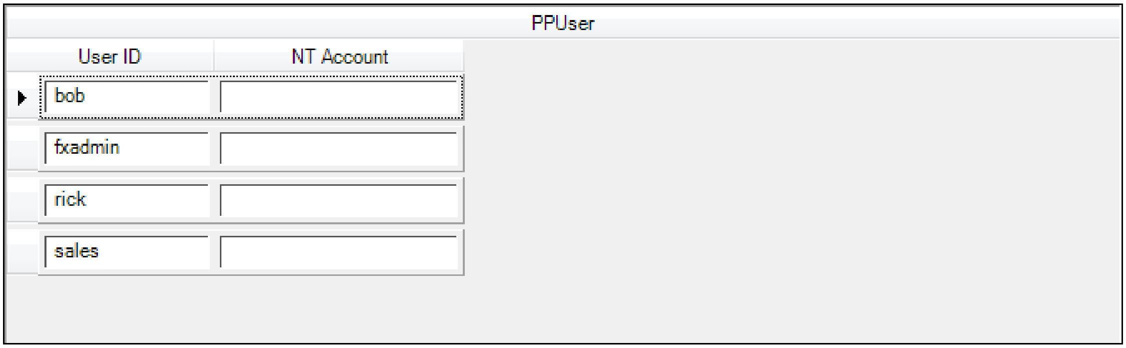


If you would like to give all users access to the Hierarchy, click the  button under the **Select** column. Conversely, if you would like to remove all users access to the Hierarchy, click the  button.

Note: *Besides giving a user access to a hierarchy they will require access to the On Fly hierarchy permission, this can be assigned on the Hierarchy section on User Permission; for more information see* "Hierarchy" on page 125.

5-3: User Security

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

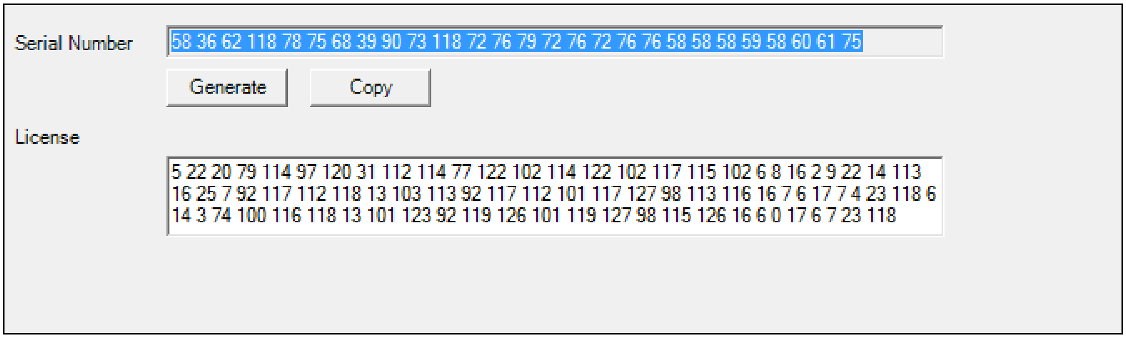


The table below details the types of configurations that can be used:

Configuration	Description
User ID	The User ID used for logging into Planning Portal.
NT Account	The Username used for logging into Windows.

5-4: License Generator

The License Generator generates a random serial number for the Planning Portal after you complete the installation. You must contact QAD for a valid License. Please see See “Planning Portal License” on page 36. for additional information.



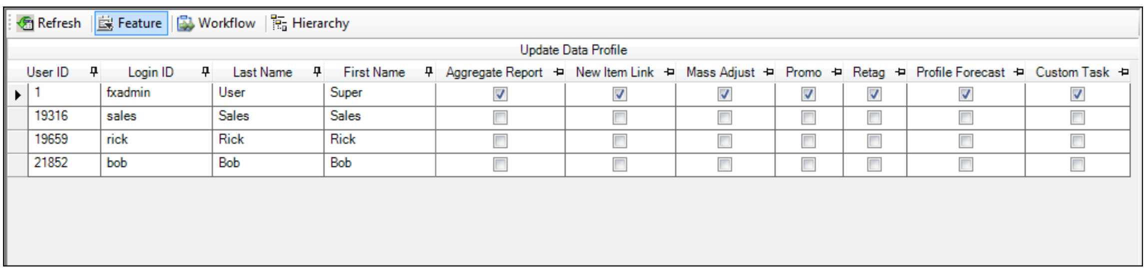
5-5: User Permission

This section is used to define access to different features within the Planning Portal.

5-5-1: Features

This section is used to assign access to the major features of the Planning Portal to each user.

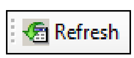
Note: *Certain Planning Portal features might not be available depending on the license type your company purchased.*



The table below details which of the features will be available to each user, to give user access to a feature enable the checkbox for that user under the corresponding column:

Configuration	Description
User ID	Provides the user ID for the particular user.
Login 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 access to the Aggregate Report feature.

Configuration	Description
New Item Link	Determines whether or not the user has access to the New Item Link feature.
Mass Adjust	Determines whether or not the user has access to the Mass Adjust feature.
Promo	Determines whether or not the user has access to the Promotions feature.
Retag	Determines whether or not the user has access to the Retag feature.
Profile Forecast	Determines whether or not the user has access to the Profile Forecast feature.
Custom Task	Determines whether or not the user will be able to run custom tasks from within the Planning Portal.

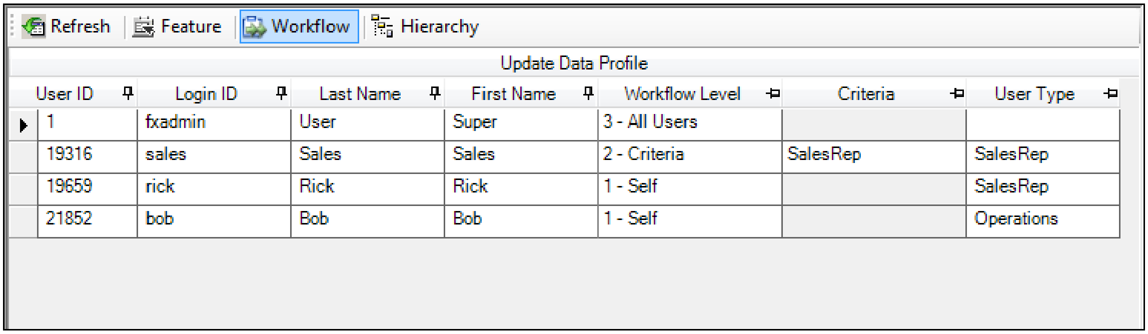
You can save your changes by clicking on the  button. You can also click on the 

button to undo any changes.

5-5-2: User Workflow

The user workflow feature allows users to communicate the status of their forecasting process every step of the way. This section allows you to define what the visibility of those workflow changes will be for every user.

For example, managers will probably need to view the status for groups of people and regular users will only need to view their own changes.



User ID	Login ID	Last Name	First Name	Workflow Level	Criteria	User Type
1	fxadmin	User	Super	3 - All Users		
19316	sales	Sales	Sales	2 - Criteria	SalesRep	SalesRep
19659	rick	Rick	Rick	1 - Self		SalesRep
21852	bob	Bob	Bob	1 - Self		Operations

The table below details the fields available on the Workflow definition screen:

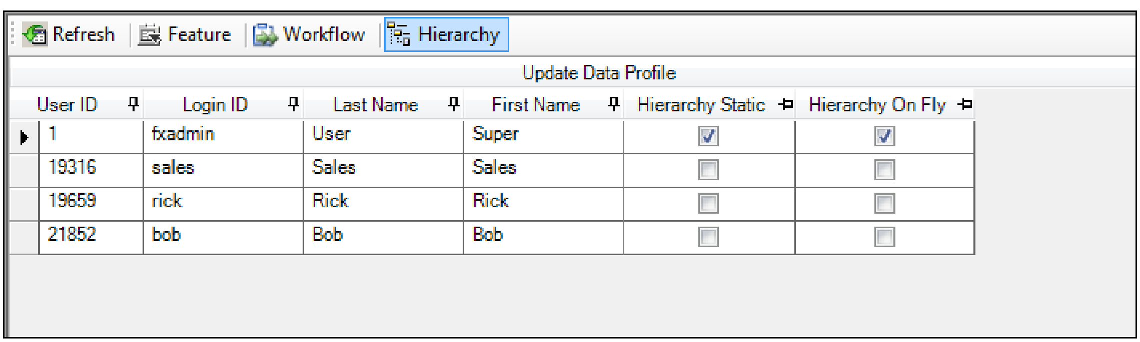
Configuration	Description
User ID	Provides the user ID for the particular user.
Login ID	Provides the user's name for logging into the Planning Portal.
Last Name	Displays the user's last name.
First Name	Displays the user's first name.
Workflow Level	The Workflow level is used to define what the visibility of the workflow status will be for each user. There are three different levels: ■ **All Users -** Gives access to view the workflow status changes for all other users in the system. ■ **Self -** Restricts access to only see a user's own workflow status changes. ■ **Criteria -** Restricts access to view workflow changes for all users of a certain type. A User Type must be specified in the Criteria column for this option.

Configuration	Description
Criteria	This field will only be enabled when the Workflow Level is set to Criteria. Here you can set which User Type the user will have access to. For example a user with a Criteria of “Sales Rep” will be able to view the workflow status changes for all users that belong to the “Sales Rep” type.
User Type	This field will display the User Type to which the user belongs. The User Type can be set by editing the user’s information under the User Management section of the Base Unit.

You can save your changes by clicking on the button. You can click on the Refresh button to undo any changes.

5-5-3: Hierarchy

This Section is used to give user’s access to using the different hierarchy types in the Planning Portal.



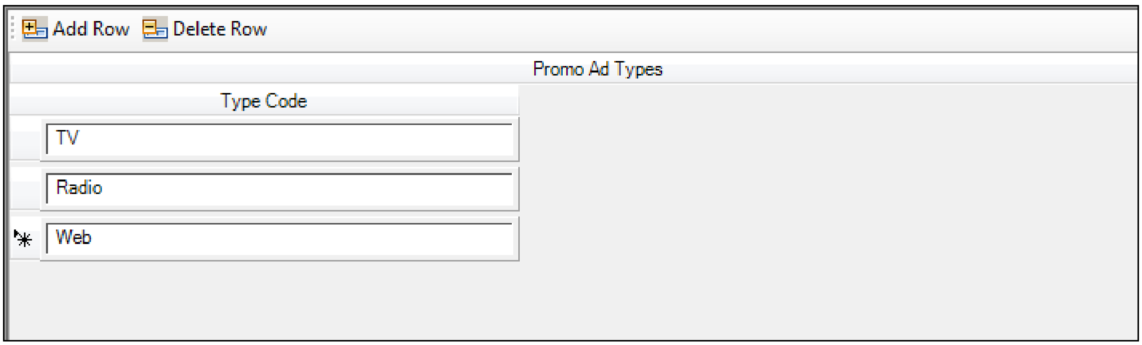
The table below details which of the features will be available to each user, to give user access to a feature enable the checkbox for that user under the corresponding column:

Configuration	Description
User ID	Provides the user ID for the particular user.
Login ID	Provides the user's name for logging in to the Planning Portal.
Last Name	Displays the user's last name.
First Name	Displays the user's first name.
Hierarchy Static	This permission will allow users to apply Static hierarchies inside the Planning Portal. Only the owner of a scenario will be able to apply or remove a static hierarchy in the Planning Portal.
Hierarchy On Fly	This permission will allow users to apply On Fly hierarchies in the Planning Portal. Besides enabling this permission users should be assigned at least one hierarchy, for more information on assigning hierarchies see "Assign Hierarchy to Users" on page 119.

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: Add a Promo Type Code

1. Click on the  button.

   A new row is added to the bottom of the list.

6-1-2: Delete a Promo Type Code

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

   The row is 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	UserValue03	Observations
COMMIT2	UserValue04	Observations
DAYS_IN_CYCLE	1	N/A

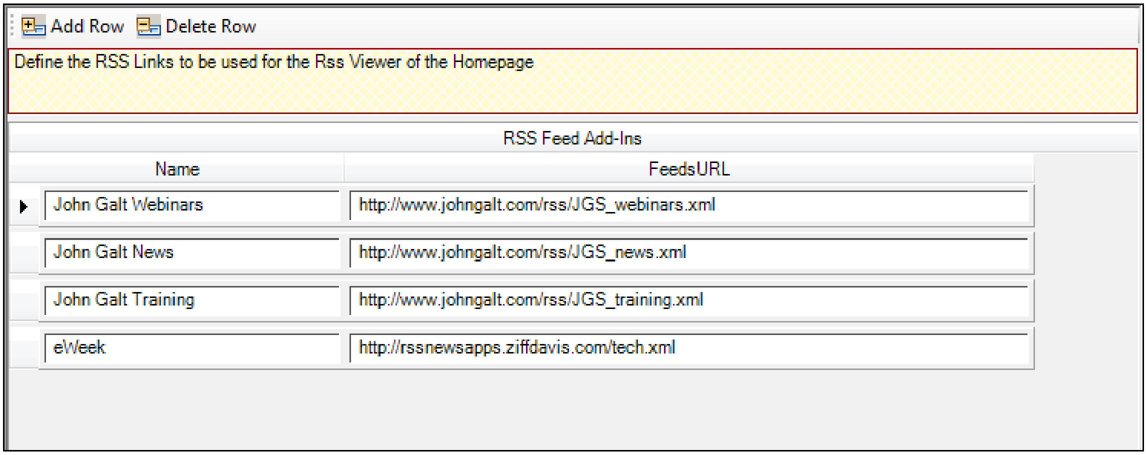
The table below details what each Field Name means. These field names are configured by your System Administrator.

Field Name	Description
CD_SKU_CD	Holds item information. Provides mapping between Promotions and the Atlas Planning Suite applications.
QY_WK_FCT_BASELINE_DMD	Determines which field you retrieve your forecast demand.
QY_WK_AMT_BASELINE_DMD	Determines which field you retrieve your actual demand.
AMT_FCT_PRICE	Determines which field you retrieve your forecast price.

Field Name	Description
AMT_FCT_ DISCOUNT_ PRICE	Determines which field provides your forecasted discount price.
AMT_FCT_ NET_PRICE	Determines which field provides your forecasted net price.
SKU_DESCRI PTION	Definition of the Sku.
KY_CUSTOM ER_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_ CYCLE	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.



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: Add a Feed

1. Click on the 

button.

   A new row is added to the bottom of the list.

6-3-2: Delete a Feed

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

button.

The row is deleted from the list.

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