Industry-specific

QAD SOLUTIONS

Manufacturing Applications

Installation Guide

QAD Planning Portal

QAD

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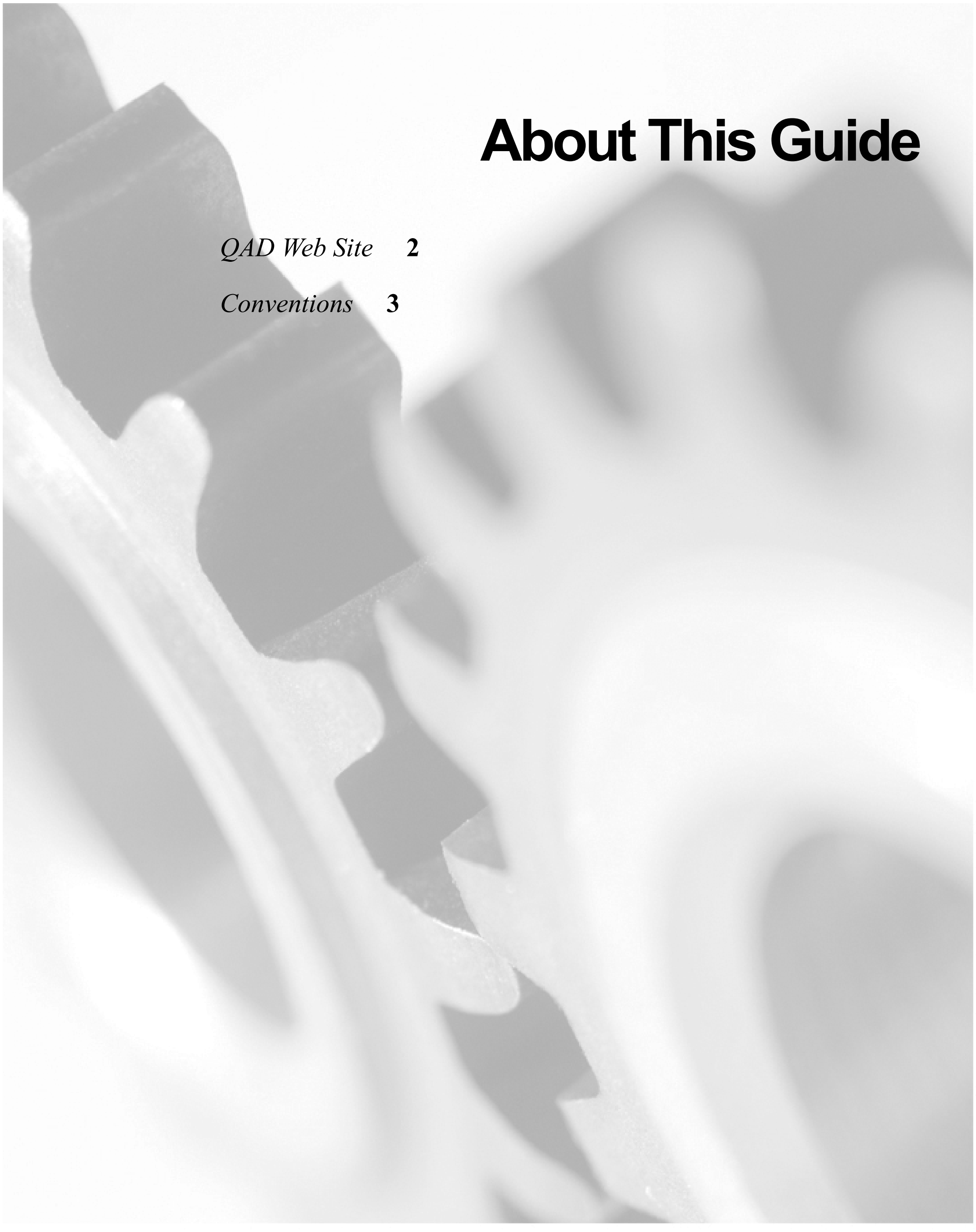
Contents

QAD



About This Guide

This guide describes the installation and configuration of the Planning Portal, which provides Web access for viewing data generated in QAD Demand Management.

For information on the QAD Demand Management Engine, see *User Guide: QAD Demand Management*.

QAD Web Site

The QAD Web site provides a wide variety of information about the company and its products. You can access the Web site at:

http://www.qad.com

For MFG/PRO users with a QAD Web account, product documentation is available for viewing or downloading at:

http://support.qad.com/

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

Most user documentation is available in two formats:

- Portable document format (PDF). PDF files can be downloaded from the QAD Web site to your computer. You can view them with the free Adobe Acrobat Reader. A link for downloading this program is also available on the QAD Web site.
- HTML. You can view user documentation through your Web browser. The documents include search tools for easily locating topics of interest.

Features also include an online solution database to help users answer questions about setting up and using QAD products. Additionally, the QAD Web site has information about training classes and other services that can help you learn about QAD applications.

Conventions

This document uses the text or typographic conventions listed in the following table.

If you see:	**It means:**
`monospaced text`	A command or file name.
`italicized monospaced text`	A variable name for a value you enter as part of an operating system command; for example, *`YourCDROMDir`*.
`indented` `    command line`	A long command that you enter as one line, although it appears in the text as two lines.
Note	Alerts the reader to exceptions or special conditions.
Important	Alerts the reader to critical information.
Warning	Used in situations where you can overwrite or corrupt data, unless you follow the instructions.

Chapter 1

Preliminaries

This section describes preliminary activities for the QAD Planning Portal installation and configuration.

Prerequisites

For a successful installation of QAD Planning Portal, the following must be installed on the Web server:

- IIS 5.1or greater
- Microsoft .NET Framework 1.1

Planning Portal supports IIS 5.1 to 6.0 and .NET Framework 1.1.

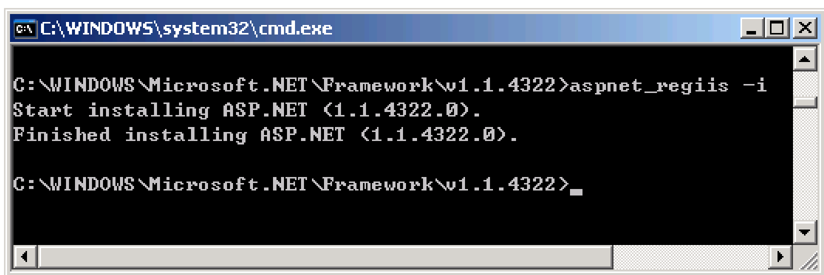
Reinstalling ASP.NET

If IIS was installed after .NET, you need to reinstall ASP.NET.

1 Navigate to the .NET folder in Windows.

2 Execute the reinstallation task for ASP.NET: `aspnet_regiis -i`

Fig. 1.1
Reinstall ASP.NET



Backing up Custom Settings

If you are upgrading your version of Planning Portal, it is necessary to save your existing Planning Portal configuration and custom settings in advance. After you remove and then reinstall Planning Portal, you need to restore the custom settings.

1 Create a backup of `Web.Config` and `CustomSettings.xml`:

```
C:\Program Files\Inetpub\wwwroot\
PlanningPortal\Web.config
```

```
C:\Program Files\Inetpub\wwwroot\
PlanningPortal\CustomSettings\CustomSettings.xml
```

2 Remove the current version of the Planning Portal using Add or Remove Programs in the Control Panel.

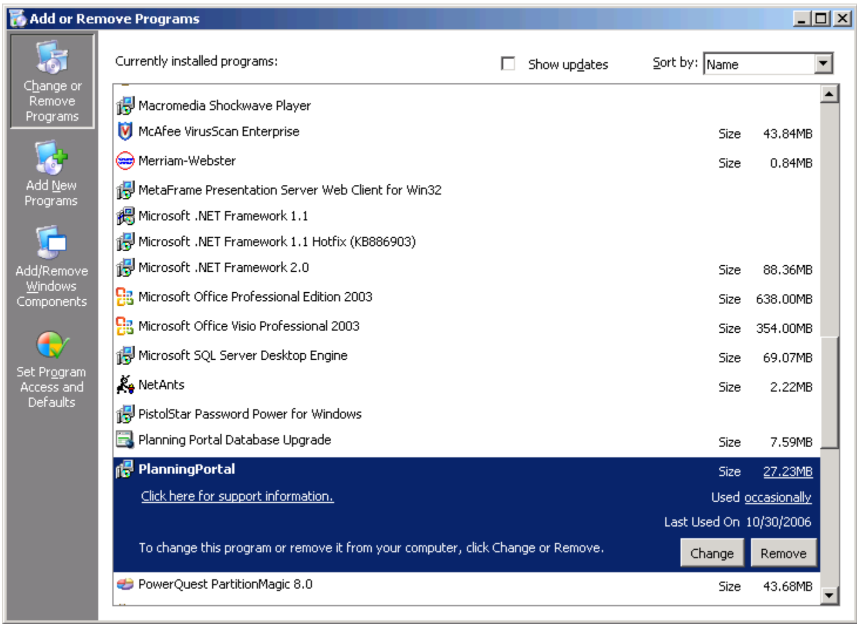


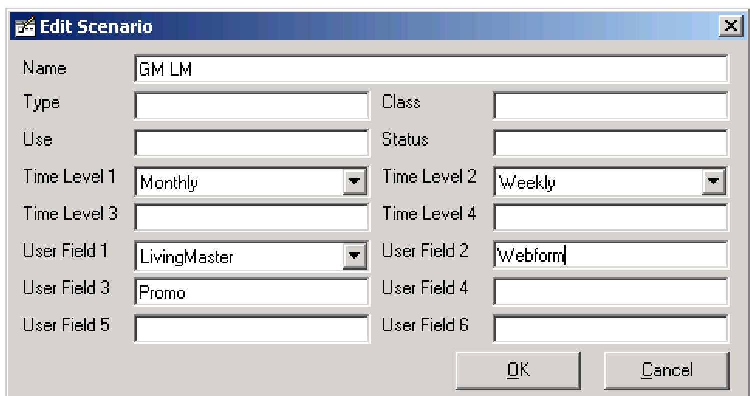
Fig. 1.2 Add/Remove Programs

Updating Scenario for Portal

Before you can use the Planning Portal with the QAD Demand Management Engine, you must update the scenarios so that they can be accessed through the portal. See *User Guide: QAD Demand Management* for details.

1. In the Base Unit of the Demand Management Engine, go to Scenario Management and edit the living master scenario that will be used for the Planning Portal. Enter `Webform` in User Field 2.

Fig. 1.3
Base Unit



2. Click OK to save the changes.

Chapter 2

Installation

This section describes how to install the Planning Portal.

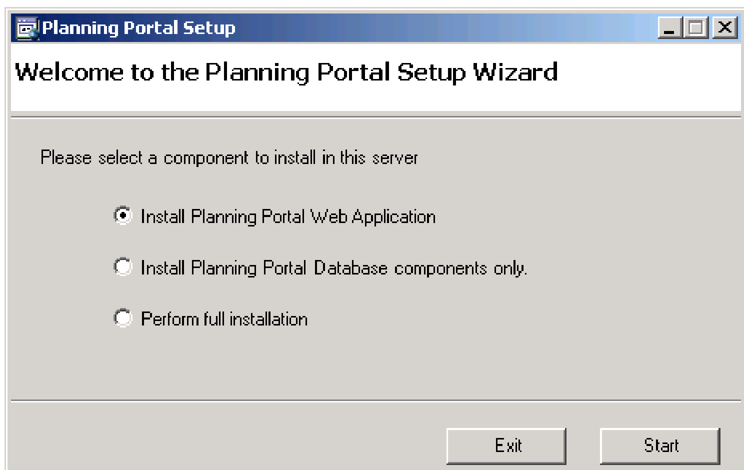
Installing the Web Application

1 On the installation CD, navigate to the Planning Portal directory.

2 On the computer where the Web server is running, double-click `PPSetup.exe` to display the Planning Portal Setup wizard.

- When the Web server and SQL server are on different computers, select Install Planning Portal Web Application.
- When the Web server and SQL server are on one computer, select Perform Full Installation.

Fig. 2.1
Planning Portal Setup, Install Planning Portal Web Application



3 Click Start.

4 Follow the wizard instructions until the Confirm Installation window is displayed.

5 Click Next to start the installation; it takes about two minutes.

6 Click Close.

The next step depends on whether the Web server and SQL server are on the same computer:

- **If the Web server and SQL server are on the same computer:** When the Web application installation is complete, as a continuation of the full installation, the wizard displays the Planning Portal Database Upgrade window. Follow the steps in "Completing Database Upgrade" on page 12.
- **If the Web server and SQL server are on different computers**: When the Web application installation is complete, follow the steps in "Installing Database Components" on page 11. You need install the Portal database components into the SQL server running on another computer.

Installing Database Components

1. On the computer where the SQL server is running, double-click `PPSetup.exe` to display the Planning Portal Setup Wizard.
2. Select Install Planning Portal Database components only; then click Start.

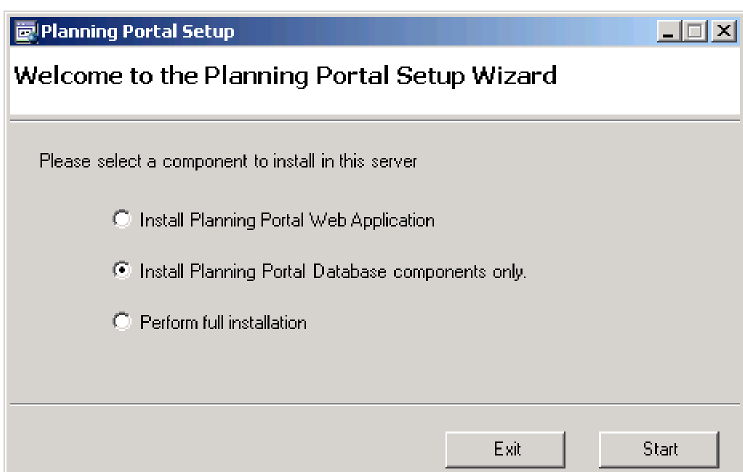


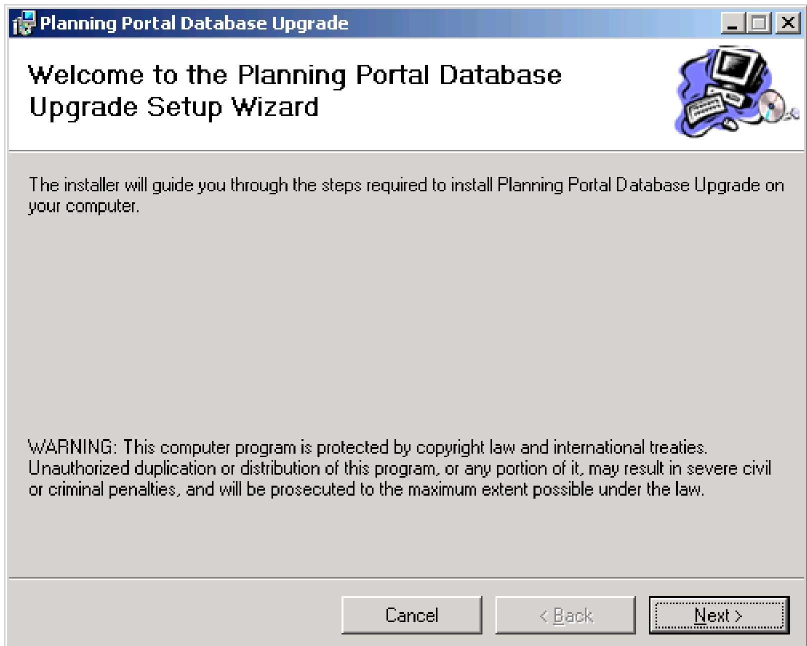
Fig. 2.2 Planning Portal Setup, Install Planning Portal Database Application

When installation is complete, the Planning Portal Database Upgrade window is displayed. To complete the database upgrade, follow the steps in "Completing Database Upgrade" on page 12.

Completing Database Upgrade

1 Click Next.

Fig. 2.3
Upgrade Portal Database



2 The Wizard prompts you for the installation folder.

a Specify the folder to install the Portal database upgrade components:

`C:\Program Files\QAD\Planning Portal Database Upgrade\`

b Select Everyone for the upgrade to be available to everyone who uses the computer.

c Click Next.

When the upgrade is complete (about one minute), the Database Administration Tool window is displayed.

Database Administration Tool

1 Enter field values.

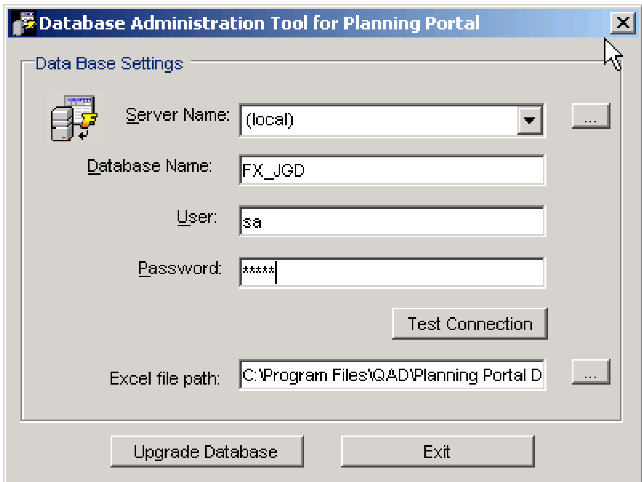


Fig. 2.4 Database Administration Tool

Server Name. Enter the database server name.

Database Name. Enter `FX_JGD` or your designated database name.

User. Enter `sa`. Always use `sa` or any other `dbo` account.

Password. Enter the `sa` or `dbo` account password.

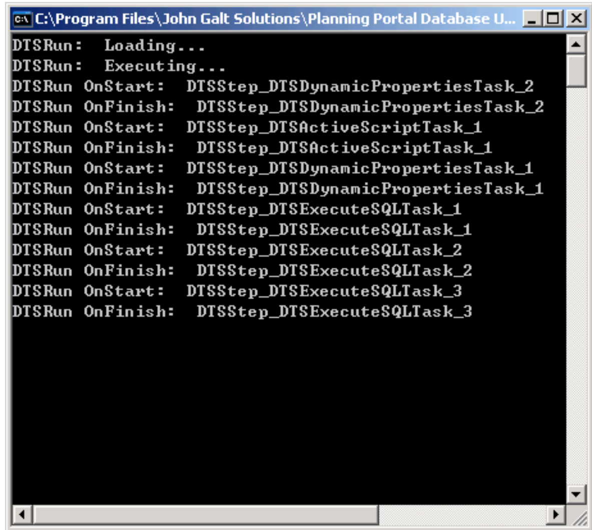
2 Click Test Connection. When the Database Administration window displays the message `Connection OK`, click OK.

3 Use the browse button to locate the directory for the MS Excel files. Accept the default path.

4 Select one of the Excel files: `Month-Week.xls` or `Week-Day.xls`.

5 Click Upgrade Database to open a window where the `DTSRun` program executes.

Fig. 2.5
DTSRun



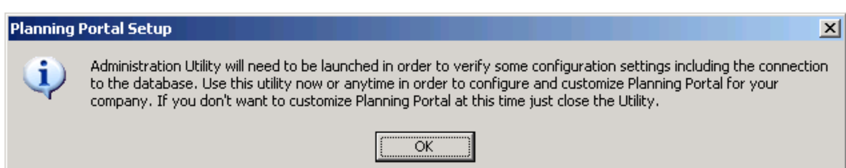
6 When the DB Administration window displays the message `Upgrade execution process is complete`, click OK.

7 When the Planning Portal Database Upgrade window displays the message `Installation Complete`, click Close.

Portal Admin Tool

When the Portal database upgrade is finished, a dialog box regarding the administration tool is displayed.

Fig. 2.6
Administration Utility



Click OK to open Admin Tool for configuring and customizing the Planning Portal.

To configure and customize the Planning Portal at a later date, close the window. The utility is in Program Files:

```
C:\Program Files\Inetpub\wwwroot\
PlanningPortal\bin\AdminTool.exe
```

See these sections for information on using the tool:

- "Settings Configuration" on page 19
- "Retag Configuration" on page 31
- "User Assignments" on page 37

Restoring Custom Settings

When you are upgrading your version of the Planning Portal, after its reinstallation, restore the backup of the `Web.Config` and `CustomSettings.xml` files to the following locations:

```
C:\Program Files\Inetpub\wwwroot\
PlanningPortal\Web.config
```

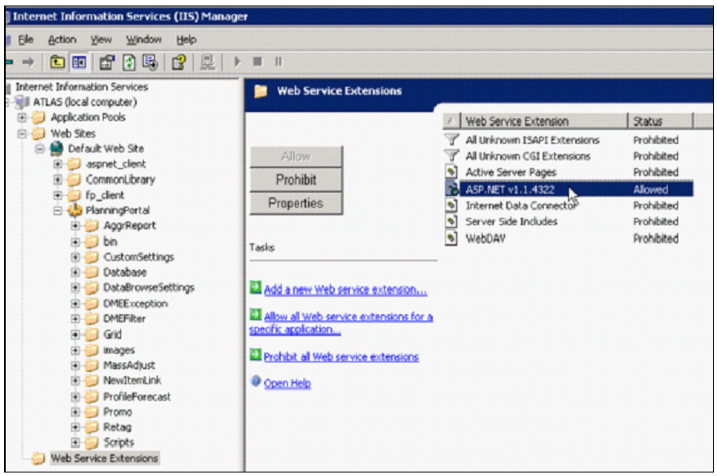
```
C:\Program Files\Inetpub\wwwroot\
PlanningPortal\CustomSettings\CustomSettings.xml
```

Instructions for Windows Server 2003

When you are installing Planning Portal on Windows Server 2003 as the Web server, follow these additional verification and configuration steps after the installation wizard completes:

1. Verify that ASP.NET v1.1.x is allowed to run on the Web server. Find it in Web server extensions.

Fig. 2.7
Web Server Extensions



2. The ASP.NET (Asp.net worker process) account on the local machine needs to be set to Full Control of the Planning Portal folder.

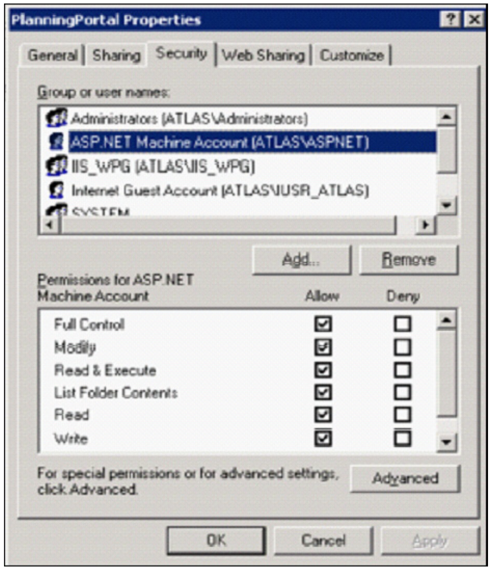


Fig. 2.8
Planning Portal Folder

3 Configure a JSE as MIME type:

a Open Internet Information Services (IIS) Manager.

b Right click on the SERVERNAME (local computer) node.

c Click on Properties.

d Click on the MIME Types button.

e Click New to add entry.

f Enter `.jse` in the extension text box.

g Enter `application /x-javascript`.

h Click OK to close the dialog box.

i Click OK to close the Property dialog box.

j Right click on the SERVERNAME (local computer).

k Select All Tasks.

l Click Restart IIS… to apply the change.

Once these elements are in place, you can proceed with the configuration of the Planning Portal.

Chapter 3

Settings Configuration

This section provides configuration information for many of the Planning Portal settings. See “Retag Configuration” on page 31 and “User Assignments” on page 37 for additional configurations.

Introduction

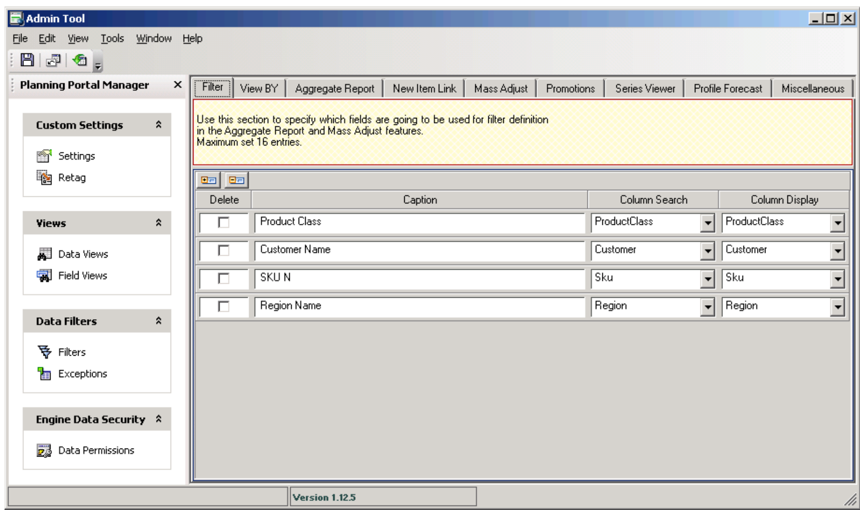
The Admin Tool lets you configure and customize the Planning Portal. For convenience, create a shortcut to the Admin Tool on the desktop.

Starting the Admin Tool

1. Double-click `AdminTool.exe`. The Admin Tool is located in:

```
C:\Program Files\Inetpub\
wwwroot\PlanningPortal\bin\AdminTool.exe
```

Fig. 3.1
Admin Tool



2. Set up a custom configuration for the following features of the Planning Portal:

   - Filter See page 22
   - View By See page 22
   - Aggregate Report See page 23
   - New Item Link See page 23
   - Mass Adjust See page 24
   - Promo Note See page 24
   - Series Viewer See page 28.

- Profile Forecast See page 28.
- Miscellaneous See page 29.
- Retag Configuration See page 31.
- User Assignments See page 37.
    - Data Views and Field Views
    - Filters and Exceptions
    - Data Permissions

Interface

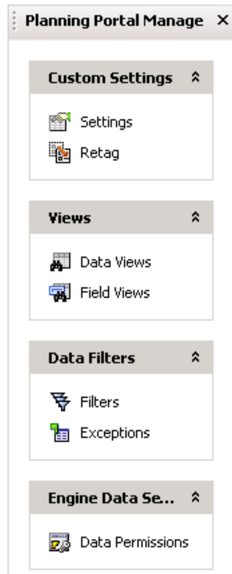
In addition to the tabs for various settings, the Admin Tool screen has a menu bar, a tool bar, and a task panel. Some actions are available as both menu choices and icons.

Table 3.1
Menu and Tool Bar Choices

Menu	Menu Choices	Tool Icon
File	Save	
	Exit	
Edit	Undo	
	Add New Row	
	Delete Selected Row	
View	Task Panel	
	Tool Bar	
Tools	Restore Default Settings	
	Import Display Set	
Window	Custom Settings	
	Data View	
	Filter	

Use the choices in the task panel to open screens for maintaining the Planning Portal features.

Fig. 3.2
Task Panel



Settings

Click Settings in the task panel to display the maintenance screen with tabs for configuring the Planning Portal settings.

Filter

On the Filter tab, specify which fields to use for filter definition in Aggregate Report and Mass Adjust features. Also, define the default filter definition structure for creating filters. The maximum number of fields allowed is 16.

View By

On the View By tab, specify which fields are available. The default is NET Revenue (ConvFactor01) and Gross Revenue (ConvFactor02). In the Planning Portal, UNITS is also available and cannot be removed. There is no maximum number of fields.

Aggregate Report

On the Report Level subtab, specify which fields to display for report-level configuration. Up to eight fields can be used. These are the default fields:

- Product Class
- SKU
- Region
- Product Brand
- Product Size
- Customer Name
- Index

On the Opinions subtab, specify which fields to display for selection during report configuration. Up to eight fields can be used; the defaults are Forecast and History.

New Item Link

Specify the fields to have available when defining new items. These fields display on the New Item tab in the Planning Portal. There are seven default fields:

- SKU Number
- Product Class
- ProductFamily
- Customer Name
- Price (default is 2300)
- Region
- Product Size

When adding a new field, Use In Description and Default Value are optional. The following fields are required:

- Caption
- Column: Series attribute from drop-down list
- Control: Text box or drop-down list

- Data Type: Alphanumeric or numeric

Mass Adjust

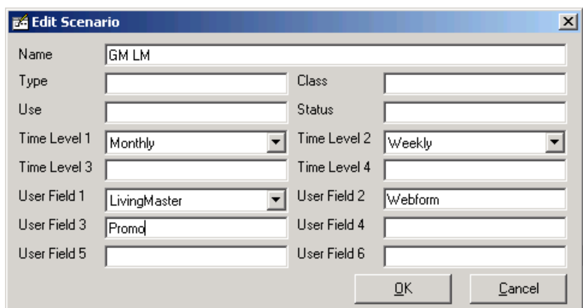
Specify which opinion lines (observation fields) are available in the Mass Adjustment Manager for adjusting multiple series. The defaults are Sales FC and History.

Promo Note

To enable promotion, you must update the scenario in the QAD Demand Management Engine.

In the Base Unit, go to Scenario Management and edit the Living Master that will be used for the Planning Portal. Enter Promo in User Field 3; then save the changes.

Fig. 3.3
Living Master: Promotions



There are six subtabs for promotion settings. Use them to define the configuration for promotion notes.

- Promo Search By
- Promo Properties Labels
- Grid Promo Notes List
- Grid Promise Dates
- Get Promo Items
- Item

Each subtab is described below.

Promo Search By

In the Promo Search By subtab, define the search options for promotion notes in the Planning Portal.

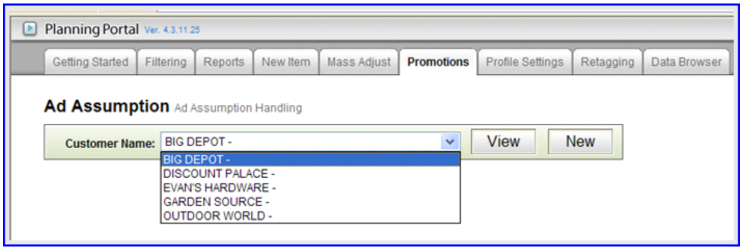


Fig. 3.4 Promotion Notes List

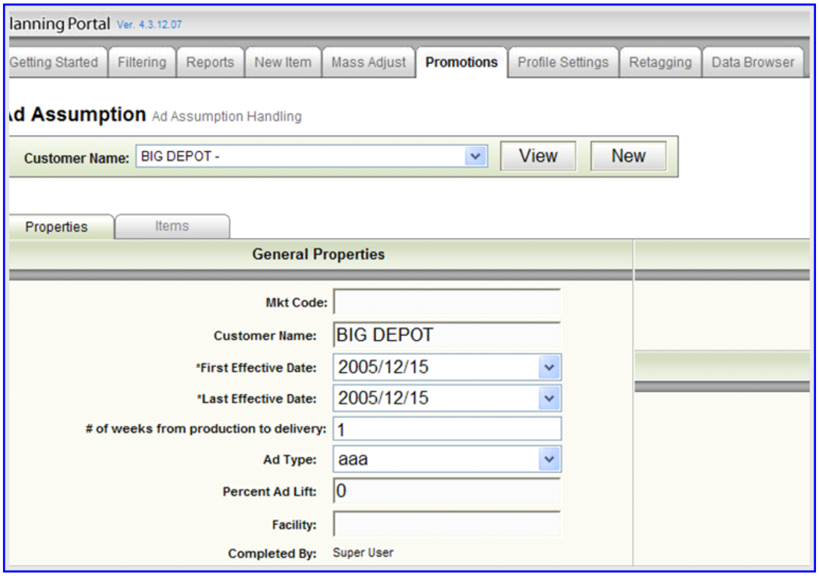
These are the default values:

- Caption: Customer Name
- Column Search: Customer
- Column Display: Cust01
- Customer Account Number: Customer
- Company Number: LocationRegion

Promo Properties Labels

Use the Promo Properties Labels subtab to define the labels for the Properties subtab on the Promotions tab.

Fig. 3.5
Properties Subtab Labels



The default values are:

- Customer Name
- Mkt. Code
- *First Effective Date
- *Last Effective Date
- # of weeks from production to delivery
- Ad Type
- Percent Ad Lift
- Facility
- Completed By

Grid Promo Notes List

Use the Grid Promo Notes List subtab to define the promotion notes list section of the Promotions tab in the Planning Portal.

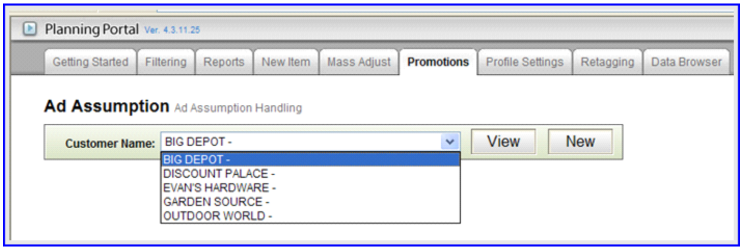


Fig. 3.6
Properties Notes List

The default values are:

- Name: PromoNotesList
- Caption: Ad Assumption
- Alignment: no default value

Grid Promise Dates

Use the Grid Promise dates to define the Promise Dates section of the Promotions tab in the Planning Portal. The default values are:

- Name: PromiseDates
- Caption: Promise Dates
- Alignment: no default value

Grid Promo Items

Use the Grid Promo Items subtab to define the Items section of the Promotions tab in Planning Portal. The default values are:

- Name: PromoItems
- Caption: Items
- Alignment: no default value

Item

Use the Item subtab to specify field names for items.

Series Viewer

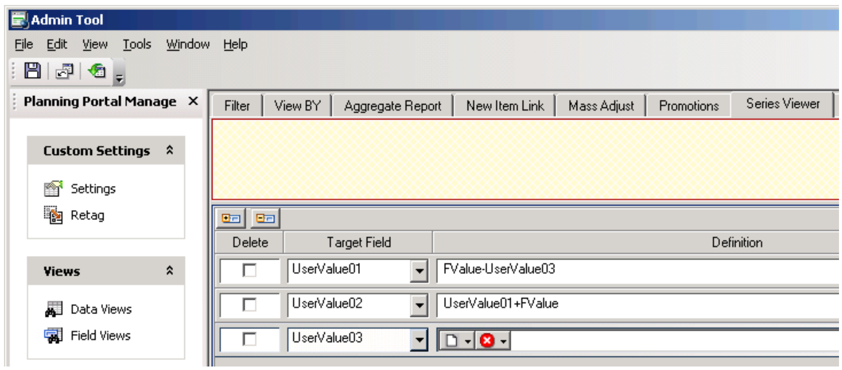
Use the Series Viewer tab to define calculations that display in the Planning Portal.

Example

`UserValue01` = `FValue` minus `UserValue03`

`UserValue02` = `UserValue01` plus `Fvalue`

Fig. 3.7
Series Viewer Tab



1. Click Add a Row to add a calculation.
2. Select a target field for the calculation.
3. Click in the Definition field.
4. Select values for the first term, operator, and second term.
5. Click Save.

Profile Forecast

Use the Profile Forecast tab to define the fields that display in the Affected Data Fields section of the Profile Settings tab in the Planning Profile.

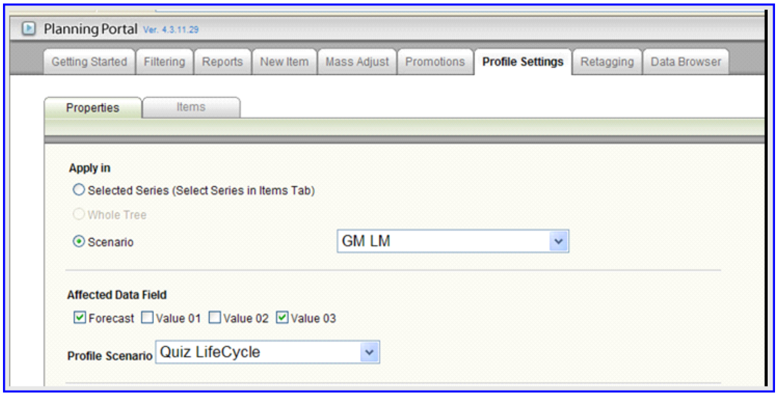


Fig. 3.8 Affected Data Fields

For each field, select an opinion from the Name drop-down list, enter a Caption alias, and select the Selected check box to enable the selection.

Miscellaneous

Database Connection

Use the Database Connection subtab to update the database connection for the Planning Portal. It defaults to the setting configured during installation.

Round Mode

Use the Round Mode subtab to set the opinion line rounding mode in the Planning Portal. Select from the following modes.

- None: No rounding action.
- Ceil: Rounds to the nearest whole number; this is the default.
- Floor: Rounds down.

Decimal Point

Use the Decimal Point subtab to set the decimal point value for the Planning Portal opinion lines. All opinion lines default to two places after the decimal point.

Others

Use the Others subtab to set these values:

CurrentDriven. Specify the field to hold the currency.

NoViewByIn. Specify the fields that are not affected by the view; for example, price.

Rebalance. Specify whether to rebalance the tree when a change of data has been made.

StoreChangeInfo. Specify whether to store information (who, when) about changes made in the opinion line data.

SCDateField. Specify the field to hold the date for when the user made a change.

SCUserField. Specify the field to hold the name of the user making a change.

CustomTaskOnUpdate. Specify whether to call a custom task when a user makes a change in the Planning Portal opinion lines.

LockedPeriodOff. Specify which fields are not affected by the locked period feature.

Chapter 4

Retag Configuration

This section describes how to configure automated processes that copy or move one series to another.

Introduction

Retagging automates processes in which one series is copied or moved to another series. Applications for this process include phasing out one product in favor of another or introducing a product similar to one that already exists. You can also use it to merge products together, split them apart, or combine customers.

The task copies part or all of an opinion line (observation field) from one series to another so you can base the forecast for one item on the history from another item.

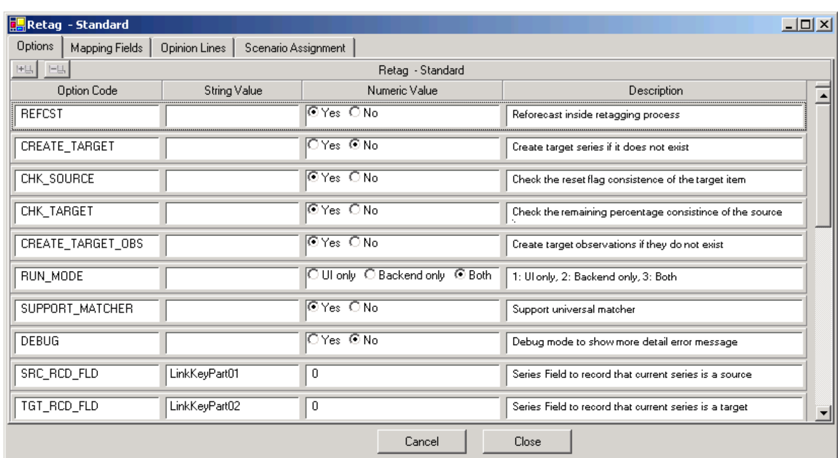
Each retagging task contains a source series, a target series, a start date, an end date, a remaining percentage, and an allocation percentage. The task copies the data from the source to the target for dates within the specified range; it then multiplies the source data by the remaining percentage and the target by the allocation percentage.

Options

In Admin Tool, click the Retag icon under Custom Settings to display defined retag configurations. Click the Edit icon to create or update a retag configuration.

Use the Options tab to specify basic information for the retag configuration.

Fig. 4.1
Retag Edit



REFCST. Reforecast during retagging process. Defaults to No. If reforecast is enabled, the task recalculates the statistical forecast for the series that are affected.

CREATE_TARGET. Create target series if it does not exist. Defaults to No. If enabled, the task creates the target series if it does not exist.

CHK_SOURCE. Check the remaining percentage consistency of the source item. Defaults to Yes. If enabled, the task checks the source series for consistency. For example, if the same series is specified as a source twice but with different remaining percentages, CHK_SOURCE issues a warning.

CHK_TARGET. Check the reset flag consistency of the target item. Defaults to Yes. If enabled, the task checks the target series for consistency.

CREATE_TARGET_OBS. Create target observations if they do not exist. Defaults to Yes. If enabled, the task creates any observation periods in the target series that are present in the source but not in the target. For example, if the source series has history going back to 2004-02, but the target history goes back to only 2004-06, the task creates observations for 2004-02 through 2004-05.

RUN_MODE. Specify where retagging can run.

UI only	(1) Runs from the user interface.
Back end only	(2) Runs from a custom task or other back-end process.
Both	(3) Runs from both.

SUPPORT_MATCHER. Support the universal matcher—the asterisk (*). Defaults to Yes. If enabled, this allows the use of the universal matcher operator.

DEBUG. Specify which debug messages to display. Defaults to No. If enabled, the log shows a more detailed error message.

SRC_RCD_FLD. Specify the series field that indicates to the process that the current series is a source. Defaults to LinkKeyPart01. After retagging, the field value is Yes if the series is a source; otherwise, it is No.

TGT_RCD_FLD. Specify the series field that indicates to the process that the current series is a target. Defaults to LinkKeyPart02. After retagging, the field value is Yes if the series is a target, otherwise, it is No.

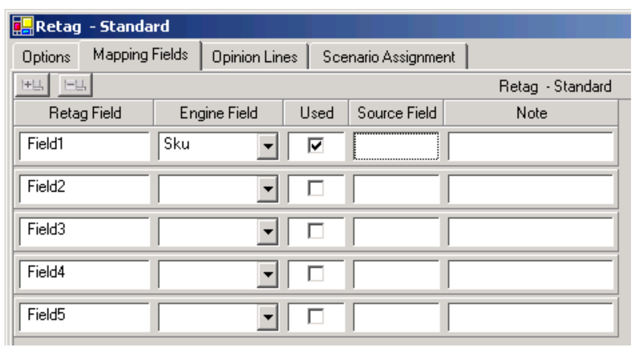
REFCST_FLD. Specify the series field that indicates to the process that the series needs to be reforecasted if reforcasting is enabled. Defaults to ReportCode. Be sure to set this to a field that you are not otherwise using.

Mapping Fields

In Retag – Standard, the Mapping Fields tab contains up to five key fields that link the source series with the target series. Use fields that uniquely identify the source and target series in the scenario. Enter the field name from the series table in EngineField; then select Used. The SourceField and Note columns are for reference only.

Add a Row and Delete a Row are not available in the Mapping Fields tab.

Fig. 4.2
Mapping Fields



Opinion Lines

In Retag – Standard, the Opinion Lines tab specifies which opinion lines are affected by retagging.

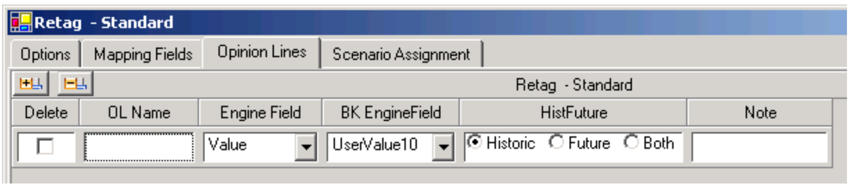


Fig. 4.3
Opinion Lines

Field Descriptions

OL Name. This is for reference only.

Engine Field. Select an opinion from the Engine Field. This is the name of the field in the Observations table.

BK EngineField. Select a backup field for an opinion line.

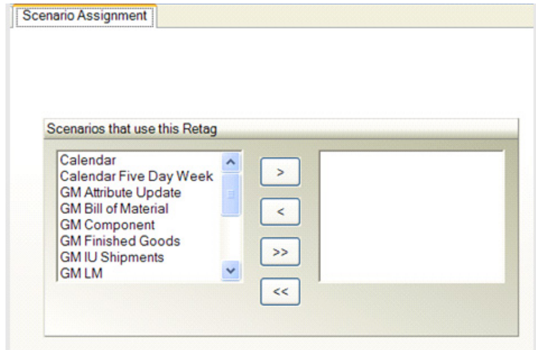
HistFuture. Defaults to Both. Select Historic to affect historical periods only; select Future to affect forecast periods only.

Scenario Assignment

In Retag – Standard, the Scenario Assignment tab specifies the scenarios to use this retag configuration

To assign the configuration to a scenario, select the scenario from the Available column on the right and use the arrow button to move it to the Selected column on the left. To deassign a scenario from the configuration, select it in the Selected column and use the arrow button to move it to the Available column.

Fig. 4.4
Scenario Assignment



Chapter 5

User Assignments

This section describes how to assign users to views, filters, exceptions, and data permissions.

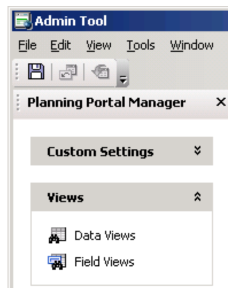
Views

Data Views

Data Views determine which opinion lines (fields) are available in the Planning Portal to view and edit.

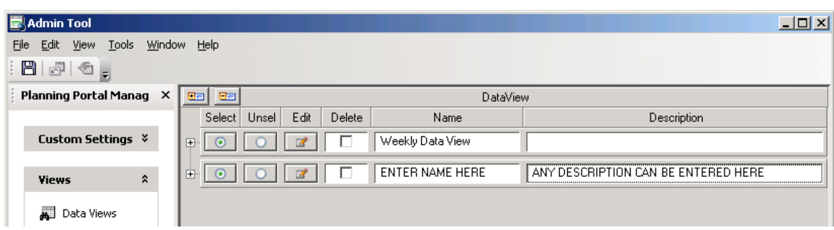
1 Select Data Views in the Views window.

Fig. 5.1
Views Menu



2 Click the Add Row icon to open a new row.

Fig. 5.2
New Data Row



3 Enter a name and description.

4 Click the Edit icon to open the screen.

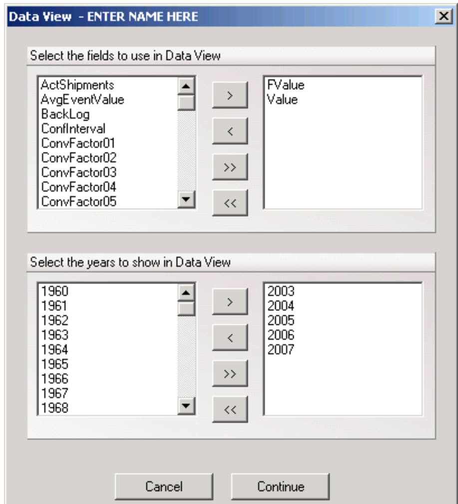


Fig. 5.3
Data View

5 Select the fields (opinion lines) to view in the Planning Portal. There is no limit to the number of selected fields.

Note The physical names of the fields appear in the Available Fields column.

6 Select the years to view in the Planning Portal.

7 Click Continue to configure the selected opinion lines.

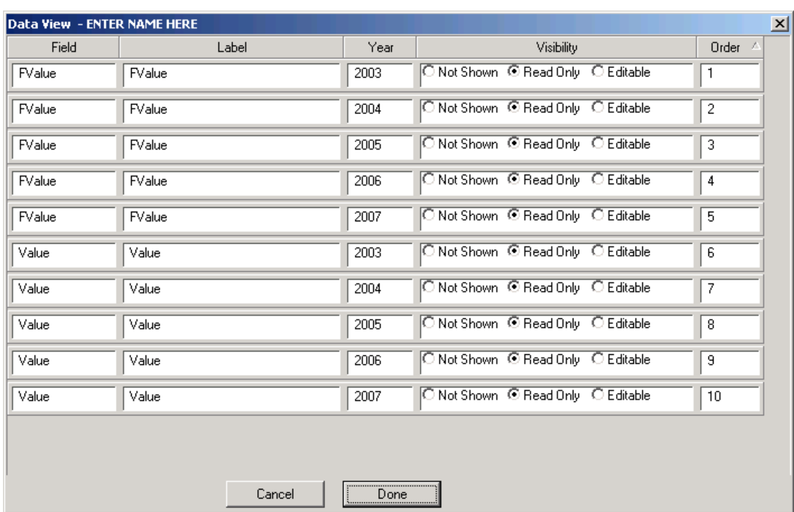


Fig. 5.4
Configure Lines

Label. Enter a label for the opinion line, such as Forecast for FValue fields and History for Value fields.

Visibility. Indicate the visibility and editing settings for each line.

Not Shown	The line is not viewable in the Planning Portal.
Read Only	The line is not editable. This is the default.
Editable	The opinion line can be modified in the view.

Order. Indicate the order in which the line appears in the Planning Portal.

8 Click Done

Field Views

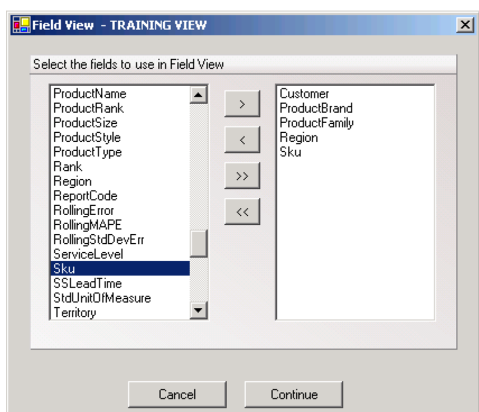
Field Views determine which series attributes are available for filtering data in the Planning Portal.

1 Select Field Views in the Views window.

2 Click Add a Row

3 Enter a name and description; then click Edit.

Fig. 5.5
Edit Field View



4 From the Available fields, select series attributes to make them available as filters in the Planning Portal.

5 Click Continue to configure the selected attributes.

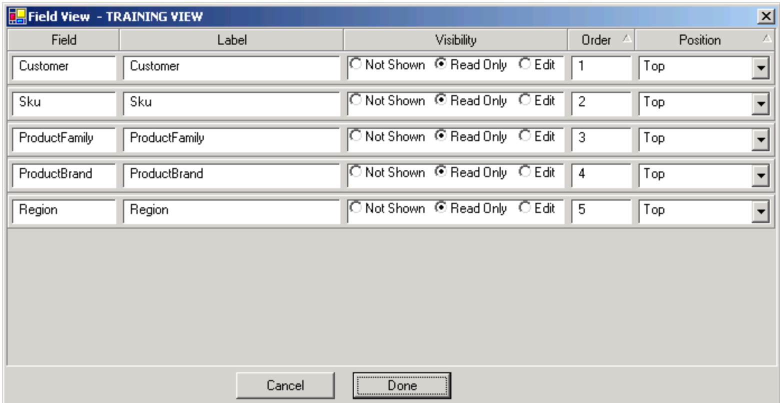


Fig. 5.6 Configure Attributes

Label. Enter a label for the attribute field that matches your business terminology, such as Product Group for ProductFamily.

Visibility. Indicate the visibility and editing settings for each attribute field.

Not Shown	The field is not viewable in the Planning Portal.
Read Only	The field is not editable. This is the default.
Editable	The attribute field can be modified in the view.

Order. Indicate the order in which the field appears in the Planning Portal.

Position. Select where in the Planning Portal the attribute is to display.

Filters and Exceptions

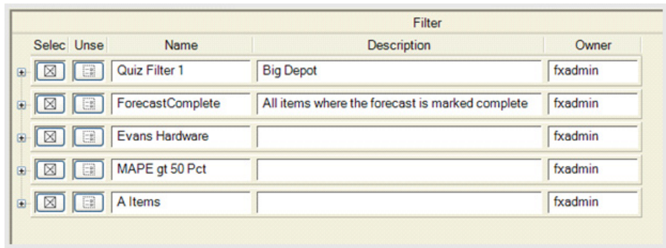
With filters and exceptions, users can view the same data series from multiple perspectives for a variety of reasons. Filters select items based on series attributes. Exceptions select items based on numerical information that is stored in observations.

In the Planning Portal, update user assignments for filters and exceptions defined in Demand Management. Only users assigned to filters or exceptions can use them.

Filters

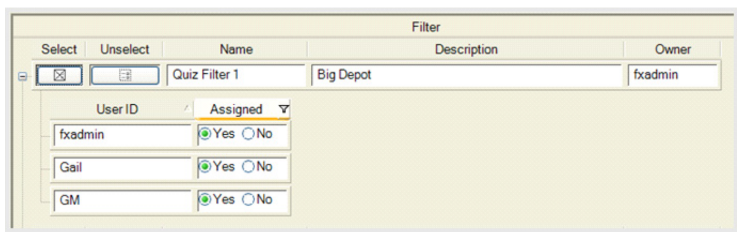
Choose Data Filters|Filters to configure filter assignments. The screen displays the filters available from Demand Management.

Fig. 5.7
Filters



1 Click the tree expansion (+) icon for a filter to update the user assignments.

Fig. 5.8
Filter Assignments



2 For each user, select Yes or No; then save.

Exceptions

Choose Data Filters|Exceptions to configure exception assignments. The screen displays the exceptions available from Demand Management.

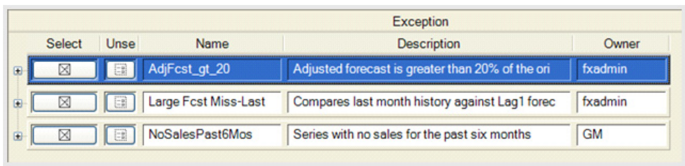


Fig. 5.9
Exceptions

1 Click the tree expansion (+) icon for an exception to update the user assignments.

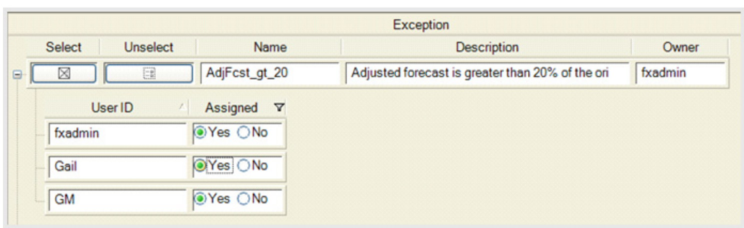


Fig. 5.10
Exception Assignments

2 For each user, select Yes or No; then save.

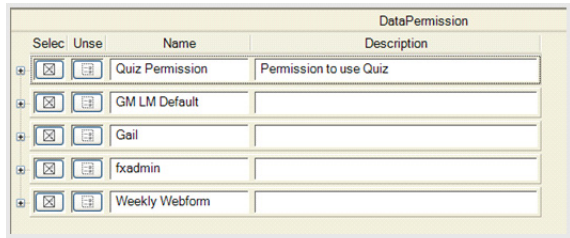
Data Permissions

In order to retrieve data from Living Master scenarios, users must be assigned to one of the data permissions defined in Demand Management.

Note A user can be assigned to only one data permission. If a user with a previous permission assignment is given a new assignment, the user loses the previous permission and acquires the new permission.

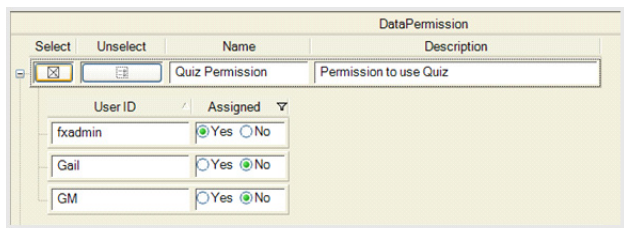
Use Engine Data Security|Data Permission to update user assignments. The screen displays the data permissions available from Demand Management.

Fig. 5.11
Data Permissions



1 Click the tree expansion (+) icon for permission to update the user assignments.

Fig. 5.12
Permission Assignments



2 For each user, select Yes or No; then save.

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