
Planning Portal User Guide

Planning Portal 3.6
Rev 1

Published—August 7, 2007

Do not duplicate.
Copyright © 2007 by QAD Inc.

Copyright Information

All Licensed Software is protected by the copyright laws of the United States and by applicable international treaties. No rights under copyrights are transferred to Customer, except as specifically provided in the License Grant.

Table of Contents

Table of Contents 3

Chapter 1 Introduction	5
Overview	5
Planning Portal Highlights	6
Logging In	6
Logging Out	8
User Groups	8
Documentation Conventions	8
Text	8
Screen Captures	9
Acronyms and Abbreviations	9
Software License; Intellectual Property	10
Preamble	10
License Grant	10
Restrictions	10
Ownership of Media	11
Note Page	12
<hr/>	
Chapter 2 Using the Planning Portal	13
Overview	13
Planning Portal at a Glance	13
Getting Started	15
Data View Settings	15
My Filters	16
My Exceptions	17
My Reports	20

Miscellaneous Features	20
Data Browser	23
Summary View	23
Detail View	26
Classic View	31
Filtering	36
Data View Settings	36
Filter Management	36
Reports	40
View Reports	41
Create a Report	42
Edit a Report	44
New Item	45
Mass Adjust	46
Promotions	50
Create a New Promotion	50
Updating a Promotion	56
Updating a Promotion Item	57
Deleting a Promotion	57
Deleting a Promotion Item	57
Changing Promotional Percentages	58
Profile Settings	59
Retagging	62
Index 1	

Chapter 1 Introduction

This chapter includes:

Section 1: Overview	5
Section 2: User Groups	8
Section 3: Documentation Conventions	8
Section 4: Acronyms and Abbreviations	9
Section 5: Software License; Intellectual Property	10

Section 1: Overview

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

1-1: Planning Portal Highlights

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

1-2: Logging In

You can access the Planning Portal from the Internet at:



1. Type in your username and password in the appropriate text boxes.

Note: *Usernames and passwords are case sensitive.*

2. Select either “Windows authentication” or “Planning Portal authentication” option under the “Login using:” area.

Planning Portal authentication is used when you want to log into each session. Windows authentication enables you to bypass the login as long as you always close out the application, but do not log out.

3. Check “Save Login Info” if you would like your username and password to be saved. This option is only available if you have selected “Windows authentication”.
4. Click Submit.

You can click on Reset to reset your username and password that has been saved; this is done if you are using a common computer in your office.

Please contact your System Administrator if you forgot or do not have a username and password.

1-3: Logging Out

If you would like to log out of the application, click on the Logout button at the top-right corner of the screen. If you logged in using Windows authentication and want to use the application without logging in, do not log out of the application. Rather, close the application.

Section 2: User Groups

User groups and privileges are dependent upon permissions granted by the System Administrator. The System Administrator configures the Planning Portal for individual users or user groups. Please contact your System Administrator if you have questions about your user privileges.

Section 3: Documentation Conventions

3-1: Text

The following table lists text conventions in this user guide.

Table 1-1: Text Convention Descriptions

	Description
Text represented as a screen display.	This typeface represents displays that appear on your terminal screen, for example: <code>lom></code>
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 .

3-2: Screen Captures

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

Section 4: Acronyms and Abbreviations

Table 1-2: Acronyms and Abbreviations used in this Manual

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

Section 5: Software License; Intellectual Property

5-1: Preamble

Any software provided to the customer is subject to the specific license terms and conditions of the applicable agreement, or shrink-wrap, or click-wrap license.

In the event of any conflict between those specific terms described below, the specific terms will supersede and prevail.

QAD Inc. agrees to those terms and are provided as follows.

5-2: License Grant

QAD Inc. grants to Customer a limited non-transferable license to use the Licensed Software subject to the limitations imposed under this Agreement and to the following:

The Permitted Users shall use the Licensed Software only on the equipment located at the Site. Customer must obtain a supplementary license from QAD Inc. (which QAD Inc. may or may not grant, at its option) before using the Licensed Software.

Customer may make one copy of the Licensed Software in machine-readable form solely for backup purposes and shall reproduce on any such copy the copyright notice and any other proprietary labeling of QAD Inc. that were on the original copy.

Customer shall comply with all restrictions on the use of Licensed Software that Customer is subject to as a licensee or sublicensee of QAD Inc. under the terms of licenses or other agreements or arrangements by QAD Inc. with third parties.

5-3: Restrictions

Except as necessary for Customer to exercise its express rights hereunder, Customer may not itself or allow any third party to (i) make copies of the Licensed Software, (ii) distribute the Licensed Software

to others, (iii) electronically transfer the Licensed Software from one computer to another over a network, or (iv) decompile, reverse engineer, disassemble, or otherwise reduce the Licensed Software to a human perceivable form. CUSTOMER MAY NOT MODIFY, ADAPT, TRANSLATE, RENT, LEASE, LOAN, RESELL FOR PROFIT, DISTRIBUTE, NETWORK, OR CREATE DERIVATIVE WORKS BASED UPON THE LICENSED SOFTWARE OR ANY PART THEREOF.

5-4: Ownership of Media

The media on which the Licensed Software is recorded or fixed is Customer's property. If Customer receives Licensed Software hereunder that renders Licensed Software that Customer has previously received redundant, Customer will return the redundant Licensed Software to QAD Inc. or certify in writing that all copies of such Licensed Software have been erased.

Chapter 2 Using the Planning Portal

This chapter includes:

Section 1: Overview	13
Section 2: Planning Portal at a Glance	13
Section 3: Getting Started	15
Section 4: Data Browser	23
Section 5: Filtering	36
Section 6: Reports	40
Section 7: New Item	45
Section 8: Mass Adjust	46
Section 9: Promotions	50
Section 10: Profile Settings	59
Section 11: Retagging	62

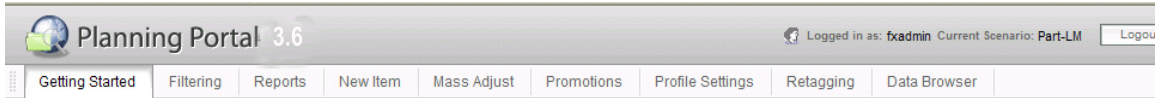
Section 1: Overview

The Planning Portal enables you to access your scenarios remotely from the Internet. You can view, edit and commit any changes to the scenario. This chapter details the Planning Portal's features and how to access them.

Section 2: Planning Portal at a Glance

The toolbar below details the features available in the Planning Portal. By default, the Planning Portal has the Getting Started, Filtering, and Data Browser tabs displayed. Your System Administrator can configure your user permissions and grant you privileges for all tabs, features, of the

Planning Portal. The toolbar also displays the current scenario that is open next to your login username..



The table below describes what each tab means. Each tab is discussed in more detail later in this chapter.

Table 2-1: Planning Portal Tabs

Tab	Description
Getting Started	Home page for the Planning Portal. Can access Data View Settings, My Filters, and My Exceptions.
Filtering	Enable you to limit displayed series with Attributes that meet a defined criterion.
Reports	Enables you to create, view and edit Reports.
New Item	When a new series is forecasted, the series can be added in the New Item area by entering the SKU number and selecting the item's Attributes from the drop down selection.
Mass Adjust	Enables you to make Forecast adjustments to multiple series.
Promotions	Enables you to add sales Promotions to the forecast.
Profile Settings	Enables you to apply a pattern to the forecast of a series to compensate for predictable growth or decrease in a product's demand that is not captured by most statistical forecasting methods.
Retagging	Enables you to copy history, forecast, or any other Opinion Line from an old series to a new series.
Data Browser	Enables you to view filtered data; this is optimal when you want to view a specific set of data.

Section 3: Getting Started

Getting Started is the Home page for the Planning Portal. There are several areas of the page; each is discussed briefly in this section.

Data View Settings

View Type | View By | Visibility | Date Range | Calendar | Order By | Level

My Filters

Select a filter

Casings

Create New Filter

My Reports

Select a report

My New Report

Create New Report

My Exceptions

Exceptions Name	Refresh Exception
aaa	
Default exception	
test 20%	

Run All Exceptions

[Exception Management](#)

3-1: Data View Settings

You can configure your Data View settings in this area. The table below details what each tab means.

Tab	Description
View Type	You can view the Data View in three different ways: <ul style="list-style-type: none">■ Classic■ Detail■ Summary
View By	You can view the Data View in three different ways: <ul style="list-style-type: none">■ Units■ Any Conversion factor already configured <p>For example, if you have a price for an item and would like to view the price in dollars, you can do this by using View By to multiply everything by the price.</p>
Visibility	Enables you to select the Data View and Field View. If you have multiple Data Views or Field Views assigned, you can select a different one. You can also select to display the Command Bar by checking the Show Command Bar text box.
Date Range	Enables you to determine the date range for the data you want to view.
Calendar	Enables you to set everything to a month offset. For example, if you wanted to offset everything and view a March-February year, or a fiscal year, you can use Calendar Jump.
Order By	Enables you to sort your data in ascending or descending order.
Level	Enables you to set the default level of the hierarchy.
My Reports	The My Reports tab displays if a report has been created.

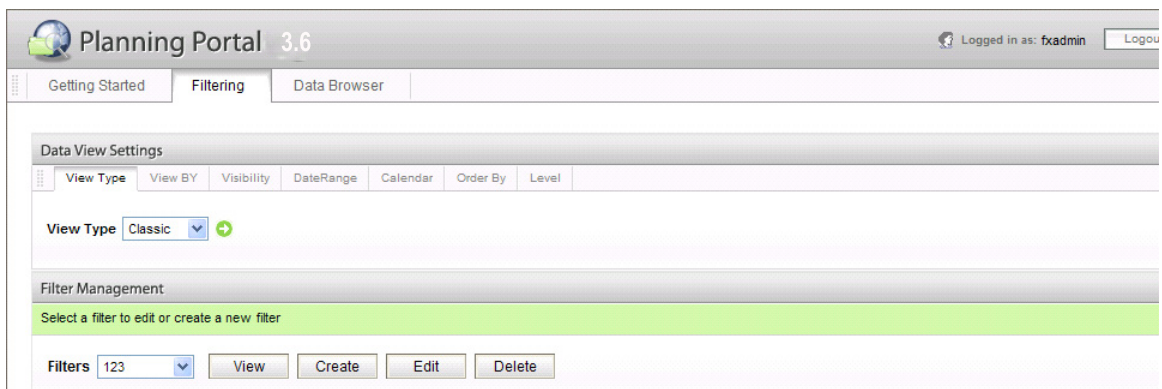
3-2: My Filters

You can select a filter from the drop down list to choose a certain search criteria for your series. Click on the green arrow to display the series in the Data Browser.






For additional information in regard to My Filters, see [Section 5: Filtering](#).

3-3: My Exceptions


Enables you to select items based on the numerical information that is stored in Observations. Your System Administrator must add Exceptions from the Viewer. Users can only run Exceptions. If you are having difficulties running an Exception, please contact your System Administrator.



On the Getting Started page, the Exceptions are listed in the My Exceptions area.

My Exceptions	
Exceptions Name	Run Exception
ab	
try me	
uh	
 Run All Exceptions	
Exception Management 	

Click on the  icon to run an Exception. Alternatively, you can click

on  [Run All Exceptions](#) icon to run all the Exceptions available. You can view your Exceptions in the [Data Browser](#).

3-3-1: Exception Management

The Exception Management link enables you to manage all of the Exceptions available and to assign them to specific users. Exceptions can only be created by the System Administrator in the Viewer. Exceptions

can be assigned in the Planning Portal. After clicking on the link, the Exception Assignment window displays.

Exception Management - Microsoft Internet Explorer

Exception Management

Exception Assignment [Close W](#)

User: ed

Exception Name: ab

Scenario: a

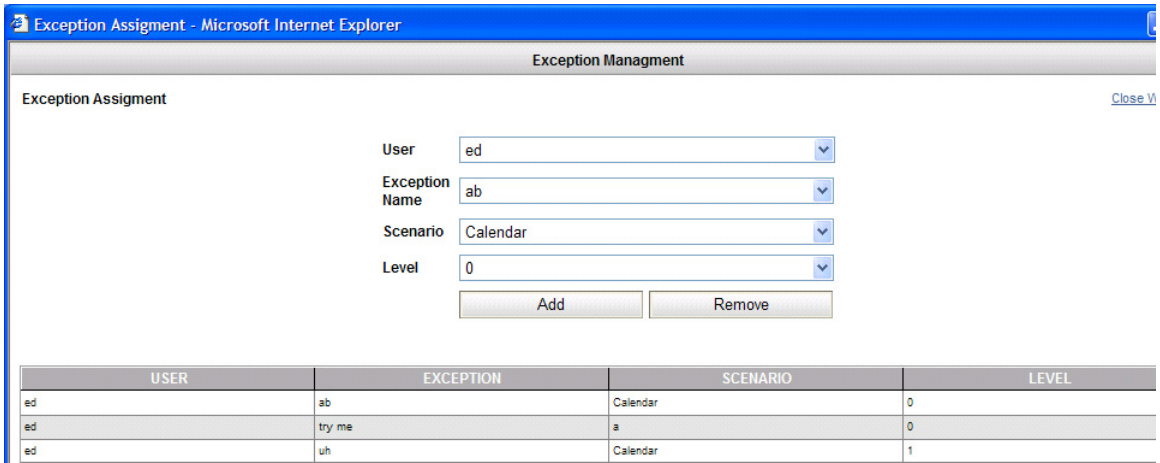
Level: 0

Add Remove

USER	EXCEPTION	SCENARIO	LEVEL
------	-----------	----------	-------

1. From the drop down boxes shown above, select the following criteria for your Exception:
 - User
 - Exception Name
 - Scenario
 - Level (0-8) - It is recommended to run your Exceptions at the lowest level (0).

2. Click Add. The criteria is then listed under the USER, EXCEPTION, SCENARIO, and LEVEL columns.



To remove the criteria, select the criteria you would like to remove from the drop down boxes and click Remove.

The information is then removed from the column.

3. Click Close Window to close out the Exception Management window.

3-4: My Reports

The My Reports area is displayed on the Getting Started page after you create a report and add data. For additional information in regard to creating reports, see [Section 6: Reports](#).

3-5: Miscellaneous Features

The Getting Started page has additional features that are configured by your System Administrator.

3-5-1: Planning Portal Quick Start Guide

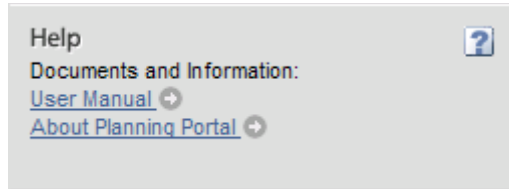
On the top left-side of the Getting Started page, you can access the PP Quick Start Guide by clicking on each of the PP features.

For example, if you click on Filtering, the row expands with additional information:



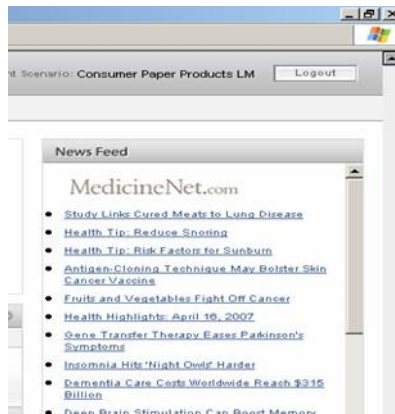
3-5-2: Planning Portal User Guide

On the bottom left-side of the Getting Started page, you can access this guide by clicking on the User Manual link.



3-5-3: News Feed

Also on the right-hand side of the page is the News Feed section, which are web sites that are linked to the Planning Portal and configured by your System Administrator.



Section 4: Data Browser

The Data Browser enables you to view the data you have selected. To change views, go to the View Type tab in Data View Settings.

Data Browser View	Description
Summary View	Focuses on multiple items.
Detail View	Focuses on one item at a time with the hierarchy tree displayed.
Classic View	Focuses on one item at a time.

4-1: Summary View

In Summary View, data for multiple items can be viewed.

4-1-1: Summary View Highlights

- Spreadsheet format
- Columns are adjustable
- Attributes are frozen on the left, when the scroll bar is moved.
- Can toggle an item between Summary View and Detail View
- Export to Excel

4-1-2: Navigating in Summary View

Chapter 2

Planning Portal - Microsoft Internet Explorer

Planning Portal 3.6



Getting Started Filtering Reports Mass Adjust Promotions Data Browser

Data View Settings 42 Items found

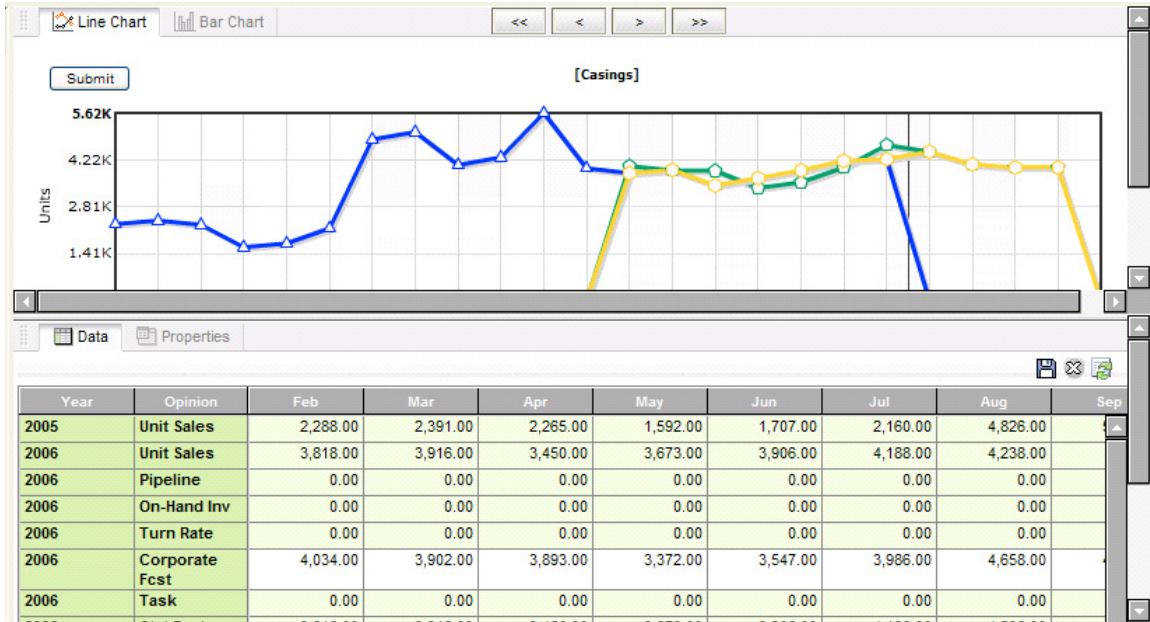
Page: 1



Items per page: 10 Refresh Export to Excel Export All to Excel Filter Skin From: (All)

SKU	Product	Region	Customer	Customer	Shipping Site	Sales Rep	Year	Opinion	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
100C11416C1	Tissue	EASTERN	Pick 'n Pay	A60	Durban	Kristin	2005	Forecast	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	EASTERN	Pick 'n Pay	A60	Durban	Kristin	2005	Budget	1.00	1.00	1.00	0.00	1.00	1.00	1.00	1.00	1.00
100C11416C1	Tissue	EASTERN	Pick 'n Pay	A60	Durban	Kristin	2005	Budget	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	EASTERN	Pick 'n Pay	A60	Durban	Kristin	2005	Sales Rep	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	EASTERN	Pick 'n Pay	A60	Durban	Kristin	2006	Actual Sales	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	EASTERN	Pick 'n Pay	A60	Durban	Kristin	2006	Forecast	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
100C11416C1	Tissue	EASTERN	Pick 'n Pay	A60	Durban	Kristin	2006	Budget	0.00	0.00	0.00	1.00	0.00	0.00	0.00	1.00	0.00
100C11416C1	Tissue	EASTERN	Pick 'n Pay	A60	Durban	Kristin	2006	Sales Rep	0.00	4.00	0.00	4.00	0.00	2.00	4.00	0.00	12.00
100C11416C1	Tissue	EASTERN	Pick 'n Pay	A60	Durban	Kristin	2007	Actual Sales	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	EASTERN	Pick 'n Pay	A60	Durban	Kristin	2007	Forecast	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
100C11416C1	Tissue	EASTERN	Pick 'n Pay	A60	Durban	Kristin	2007	Budget	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	EASTERN	Pick 'n Pay	A60	Durban	Kristin	2007	Sales Rep	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2005	Actual Sales	0.00	4.00	0.00	8.00	4.00	8.00	0.00	0.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2005	Forecast	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2005	Budget	0.00	0.00	36.00	0.00	0.00	0.00	0.00	1.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2005	Sales Rep	0.00	4.00	0.00	0.00	20.00	0.00	8.00	0.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2006	Actual Sales	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2006	Forecast	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2006	Budget	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2006	Sales Rep	0.00	0.00	0.00	4.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2007	Actual Sales	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2007	Forecast	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2007	Sales Rep	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2005	Actual Sales	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2005	Forecast	1.00	1.00	0.00	1.00	1.00	1.00	1.00	1.00	1.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2005	Budget	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2005	Sales Rep	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2006	Actual Sales	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2006	Forecast	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
100C11416C1	Tissue	SOUTHERN	Pick 'n Pay	A6A	Pretoria	Peter Terrio	2006	Budget	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

1. Edit the data in the cells by clicking on the field and making your changes.
2. From the Filter Region From drop down box, you can filter the data by any of the listed Attributes.
3. Click the  icon to save your changes.
4. To view the an item in Detail View, click on the  icon next to the item.

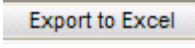
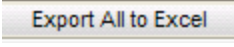
This icon is used to display one item in Detail View.



5. To go back to Summary View, click on the  icon next to the  icon in the Data Selection heading.

Note: *The PP does not show a tree in Summary View. If you want to see the tree, switch to Detail View.*

4-1-4: Export to Excel

1. Click on the  button to export an item to Excel.
2. Alternatively, click on the  button to export all items to Excel. After you export to Excel, you can make edits in Excel. However, ensure that all cells in Excel are number formatted to “General”.

Note: *In a Scenario with Daily Observations, the Excel file does not export all columns. This is an Excel limitation, as it only supports 256 columns.*

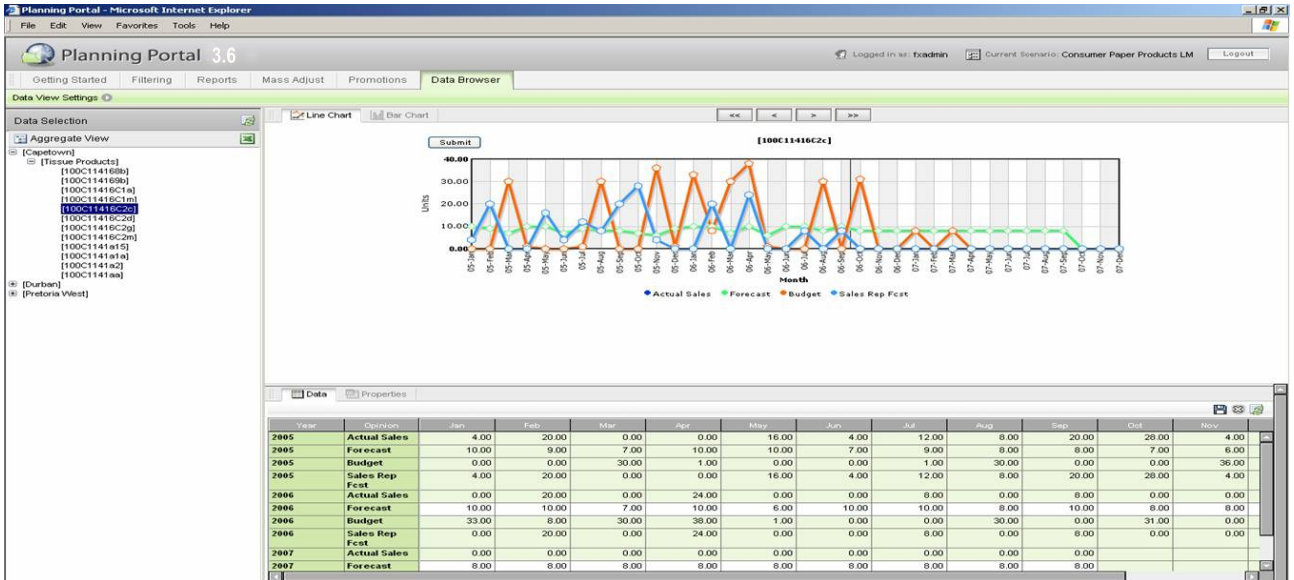
4-2: Detail View


In Detail View, individual items can be viewed with the hierarchy tree displayed.

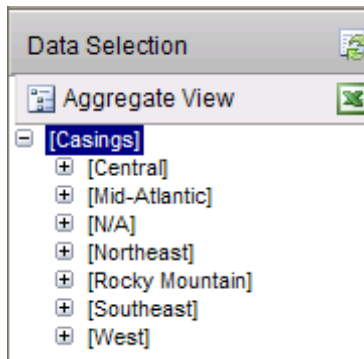
4-2-1: Detail View Highlights


- User Interface mimics the DME Viewer
- From the Level tab, you can choose whether or not to view the hierarchy. (default is Yes).
- Left-side panel displays the hierarchy tree.
- Upper panel displays a graph (either Line or Bar).
- Lower panel displays the data in a grid.

4-2-2: Navigating in Detail View

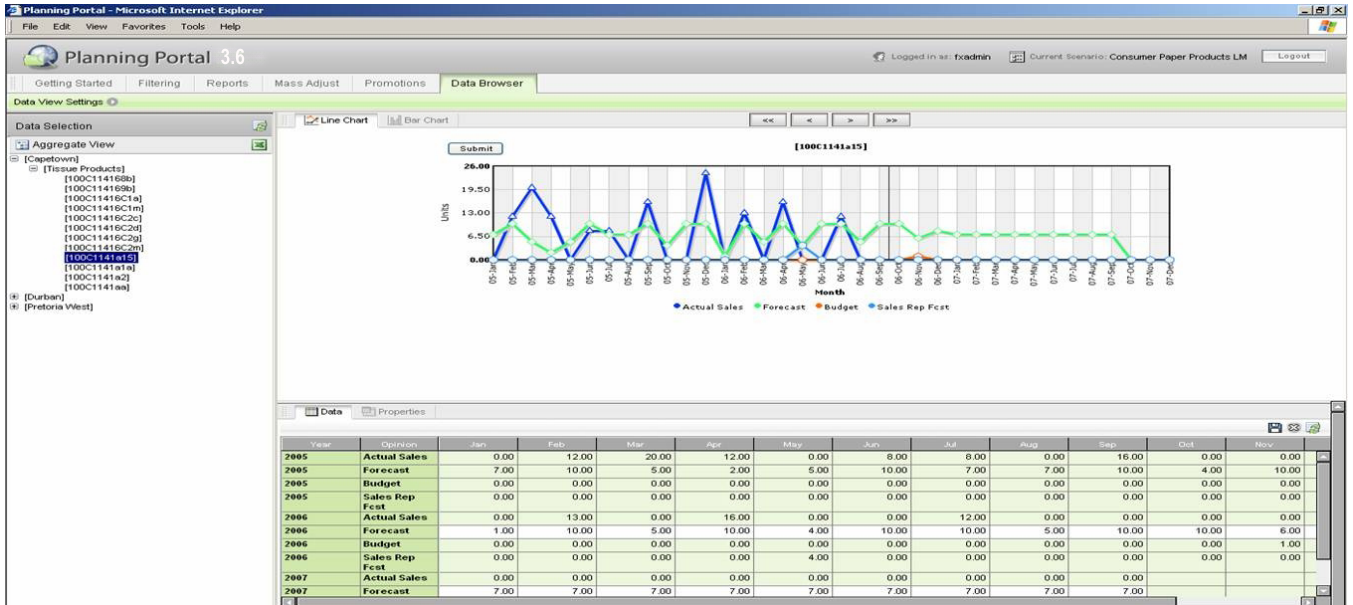


1. In the Aggregate View section in the left-hand pane, click on the  icon to expand the list.



- Click on the  buttons to scroll through the items.

4-2-3: View and Edit an Opinion Line in Detail View



- You can modify any of the lines in the Line Graph by clicking and dragging on the lines. To undo any changes you have made, click the Undo button.

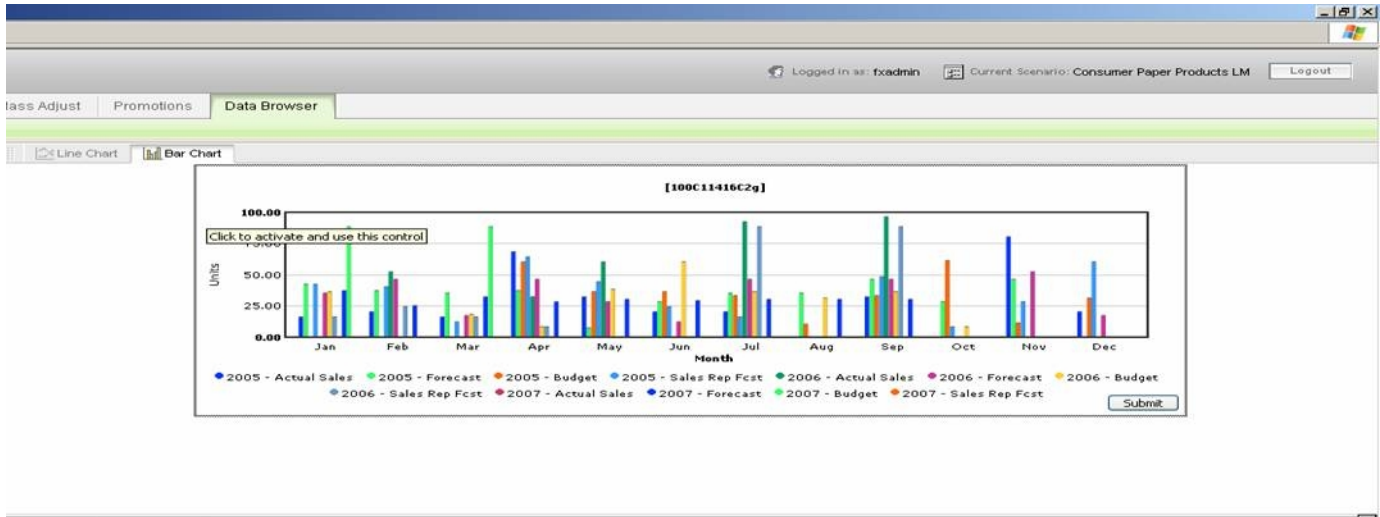
- Click the  button to update your changes.

3. From the Data tab, you can edit the data in the cells.
4. Click on the Properties tab to view the properties. You cannot edit the information displayed.



5. Click on the Bar Chart tab to view the bar chart.


The Bar Chart displays.



6. You can modify any of the lines in the Bar Graph by clicking and dragging on the bar itself to make changes to the forecast. To undo any changes you have made, click the Undo button.

7. Click the  icon when finished.

4-2-4: Export to Excel

1. Click on the  icon to export the data to Excel.

After you export to Excel, you can make edits in Excel. However, ensure that all cells in Excel are number formatted to "General".

Note: The only way to Export to Excel in the Detail View is with the Excel icon, located next to Aggregate View in the left-hand pane. This feature needs to be Enabled by your System Administrator.

4-3: Classic View

In Classic View, data is displayed for individual items.

4-3-1: Classic View Highlights

- Ability to Drill Up or Drill Down in a hierarchy.

4-3-2: Navigating in Classic View



The depiction below is an example of Classic View.

The screenshot displays the Planning Portal 3.6 interface. The main content area is titled 'Data Browser' and shows two data tables. The first table is for Sku 100C11416C1b, and the second is for Sku 100C11416C1d. Both tables show monthly data from 2005 to 2007 for various categories like Actual Sales, Budget, and Sales Rep. The interface includes navigation buttons like 'Back', 'Next', 'Series Per Page', 'Go To Page', and 'Refresh'. There are also options for 'Bar Graph View' and 'Line Graph View'.

Year	Opinion	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2005	Actual Sales	0.00	0.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	16.00
2005	Forecast	1.00	1.00	1.00	0.00	1.00	1.00	1.00	1.00	1.00	1.00	0.00	1.00	8.00
2005	Budget	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2005	Sales Rep	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.00	0.00	0.00	4.00
2006	Actual Sales	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2006	Forecast	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	9.00
2006	Budget	0.00	0.00	0.00	1.00	0.00	0.00	0.00	1.00	0.00	1.00	0.00	0.00	3.00
2006	Sales Rep	0.00	4.00	0.00	4.00	0.00	2.00	4.00	0.00	12.00	0.00	0.00	0.00	26.00
2007	Actual Sales	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2007	Forecast	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	6.00
2007	Budget	1.00	0.00	33.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	34.00
2007	Sales Rep	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Year	Opinion	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2005	Actual Sales	0.00	4.00	0.00	0.00	4.00	8.00	0.00	0.00	0.00	0.00	0.00	4.00	26.00
2005	Forecast	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	18.00
2005	Budget	0.00	0.00	36.00	0.00	0.00	0.00	0.00	1.00	0.00	0.00	30.00	0.00	67.00
2005	Sales Rep	0.00	4.00	0.00	0.00	20.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	24.00
2006	Actual Sales	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.00
2006	Forecast	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	17.00
2006	Budget	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00	0.00	0.00	9.00


The Series fields are on displayed in the Field column and the Opinions are displayed in the Opinion column. You can edit information that is in white text boxes.

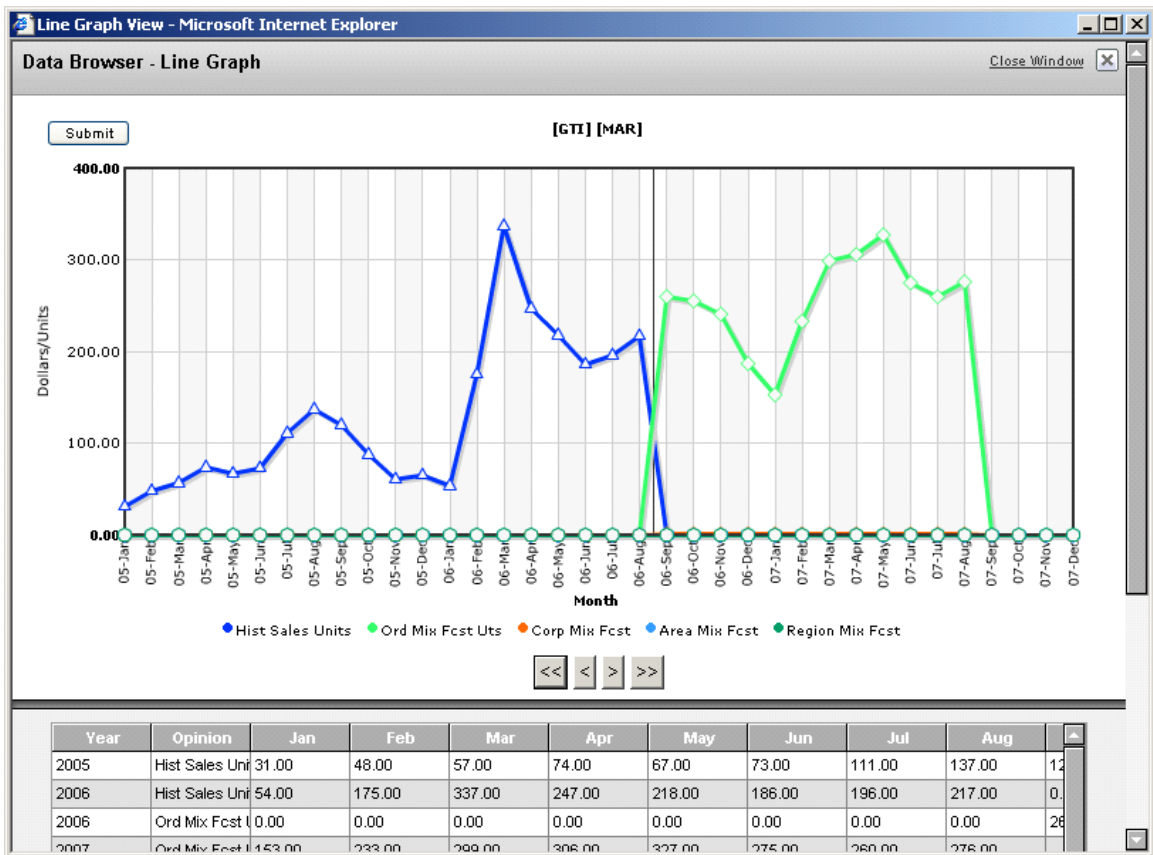
1. Click on the  icons to browse through the data.
2. From the Series Per Page, select how many series you want displayed.
3. To jump to a certain page, select the page number from the Go To Page drop down box.
4. Click on the  icon to refresh your page.

4-3-3: View and Edit an Opinion Line in Classic View

Note: *When the filter/permission applies to a tree, if the lowest level item is selected, then the parent is automatically selected in the tree view of the Detail View. Though it makes the tree consistent, it introduces inconsistencies among the Classic View, Detail View and Summary View; this is by design.*

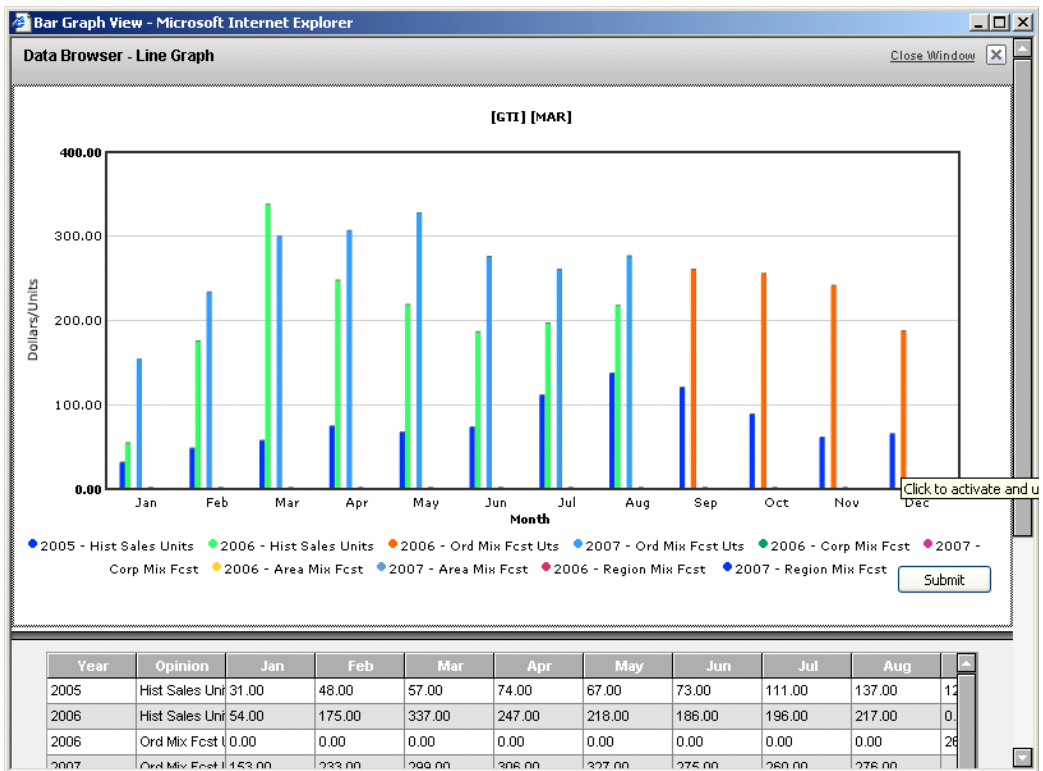
1. In the grid, type in the new value.

2. Click on the [View Line Graph](#)  icon to view in Line Graph view.






You can modify any of the lines in the Line Graph by clicking and dragging on the lines. To undo any changes you have made, click on the Undo button.

- Click on the  icon to view in Bar Graph view.





In the Bar Graph view, you can click and drag on the bar itself to make changes to the forecast. Thereafter, click Submit to update the changes made.

The Data Browser updates the data. By default, the Data Browser displays 10 series per page.

Drill Down  View Bar Graph  View Line Graph  Save Undo

Jun	Jul	Aug	Sep	Oct	Nov
73.00	111.00	137.00	120.00	88.00	61.00
186.00	196.00	217.00	0.00	0.00	0.00
			260.00	255.00	241.00
275.00	260.00	276.00			
0.00	0.00	0.00	1.00	1.00	
1.00	1.00	1.00			

- Click Save to save your changes.

- Click on the  icon to drill down to lower levels of the hierarchy. Alternatively, if you are in a lower level of the hierarchy, click on the  icon.

Drilling Down pushes the information into lower levels of the hierarchy, where you can see greater detail.

Drilling Up pushes the information into the higher levels of the hierarchy, where you can see more consolidated data.

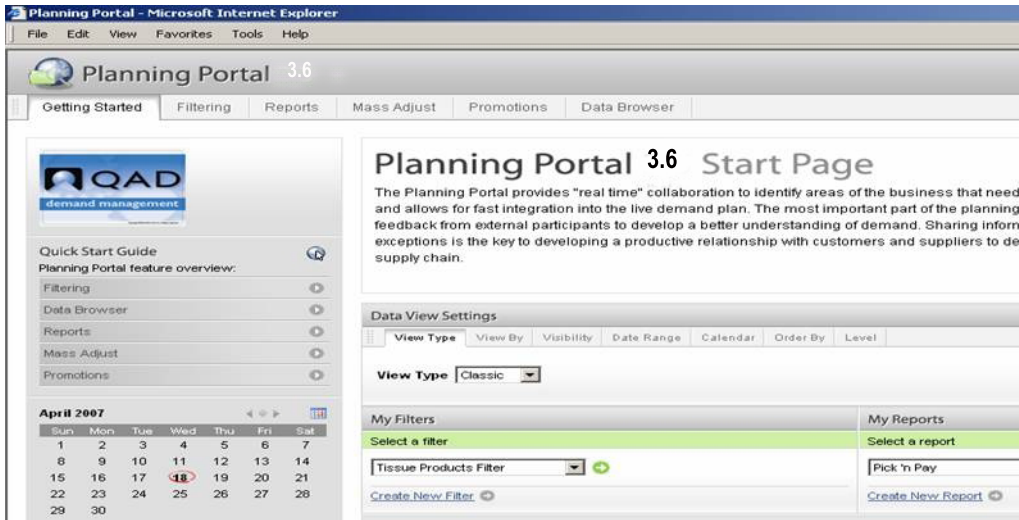
- Click Save when finished. Alternatively, click Undo to undo the changes you made.

Note: *Depending on your settings, your modifications can be automatically rebalanced within the hierarchy. Please see your System Administrator for additional information.*

Note: *If you enter the Classic View from the middle level of the hierarchy, you cannot Drill Up to a higher level.*

Section 5: Filtering

The Filtering tab enables you to view the filters that have been configured by your System Administrator.



5-1: Data View Settings

The Data View Settings area has the same configuration feature as on the Getting Started page. Please see [3-1: Data View Settings](#) for additional information about this feature.

5-2: Filter Management

You can view or edit your filters in the Filter Management area. You can also create a new filter. The filter criteria is configured by your System Administrator.

5-2-1: View Filters

1. Select the filter you want to display and click on the View button.

The Data Browser window displays with the series.

Field	Value
Region	
AreaCode	
AreaName	
Carline	Casings
Change Date	

Year	Opinion	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
2005	Unit Sales	2,120.00	2,288.00	2,391.00	2,265.00	1,592.00	1,707.00	2,160.00	4,826.00	5,057.00	4,056.00
2006	Unit Sales	3,963.00	3,818.00	3,916.00	3,450.00	3,673.00	3,906.00	4,188.00	4,238.00	0.00	0.00
2006	Pipeline	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2006	On-Hand Inv	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2006	Turn Rate	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2006	Corporate	4,492.00	4,034.00	3,902.00	3,893.00	3,372.00	3,547.00	3,986.00	4,658.00	4,467.00	4,080.00
2006	Task	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2006	Stat Fcst	3,963.00	3,818.00	3,916.00	3,450.00	3,673.00	3,906.00	4,188.00	4,238.00	4,467.00	4,080.00
2006	Fwd Plan	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2006	Note										

2. To scroll through the list, click on the Back or Next buttons.
3. To view a specific number of series per page, select the number of series from the Series Per Page drop down box.
4. To jump to a specific page, select the page from the Go To Page drop down box.
5. Click Refresh to update the current page.

5-2-2: Create Filters

To create a new filter:

1. Click on the Create button.

The Filter Management area expands.

The screenshot shows a web form for creating a filter. It has the following sections and fields:

- Filter Name:** A text input field containing "My New Filter".
- Description:** A text input field with two small square buttons (up and down arrows) on the right side.
- Definition:** A container with four fields:
 - ProductClass:** A dropdown menu.
 - LocationRegion:** A dropdown menu.
 - 6-DIGIT:** A text input field.
 - Region:** A dropdown menu.

At the bottom of the form are two buttons: "Save" and "Submit".

2. Type in a name for the new filter in the Filter Name text box.
3. Type in details for the new filter in the Description text box.
4. Select from the System Administrator configured items for the filter.
5. Click Save to save the filter or click Submit to execute without saving.

5-2-3: Edit Filters

1. Select the filter you want to edit and click on the Edit button.

The Filter Management area expands.

The screenshot shows a web form for creating a filter. It is divided into three main sections: 'Filter Name', 'Description', and 'Definition'.
- **Filter Name:** A text input field containing 'My New Filter'.
- **Description:** A text input field with two small square buttons (up and down arrows) on the right side.
- **Definition:** A container box with four fields:
 - **ProductClass:** A dropdown menu.
 - **LocationRegion:** A dropdown menu.
 - **6-DIGIT:** A text input field.
 - **Region:** A dropdown menu.
At the bottom of the form are two buttons: 'Save' and 'Submit'.

2. Type in the name for the new filter in the Filter Name text box.
3. Type in the details in the Description text box.
4. Select from the System Administrator configured items for the filter.
5. Click Save to save the filter or click Submit to execute without saving.

5-2-4: Delete Filters

1. Select the filter you would like to delete and click on the Delete button.

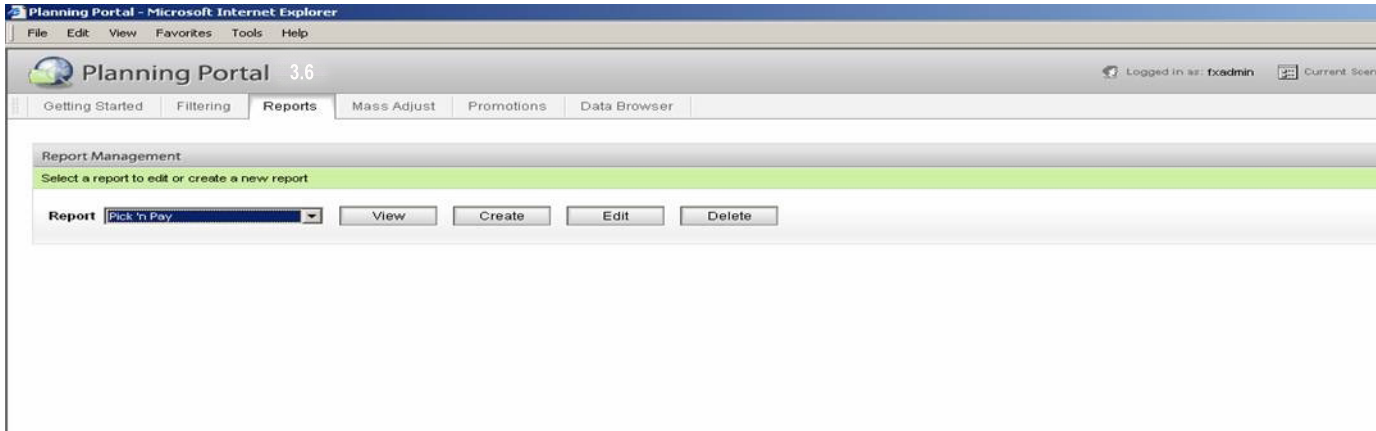
2. Click OK to delete the filter or Cancel.



Section 6: Reports

The Reports page enables you to view the Aggregate Report data, as well as the Opinion Lines. Depending upon how the System Administrator configured the Planning Portal, these features are available from the Reports tab. In addition, if you have already created a report and added data, then the [My Reports](#) feature is also located from the Getting Started page.

The depiction below is the Reports page.



You can view or edit your reports in the Report Management area. You can also create a new report.

6-1: View Reports

1. Select the report you want to display and click on the View button.

The Data Browser window displays with the Aggregate Report..

Aggregate Report - Microsoft Internet Explorer

Aggregate Report Northeast

Year: View By:

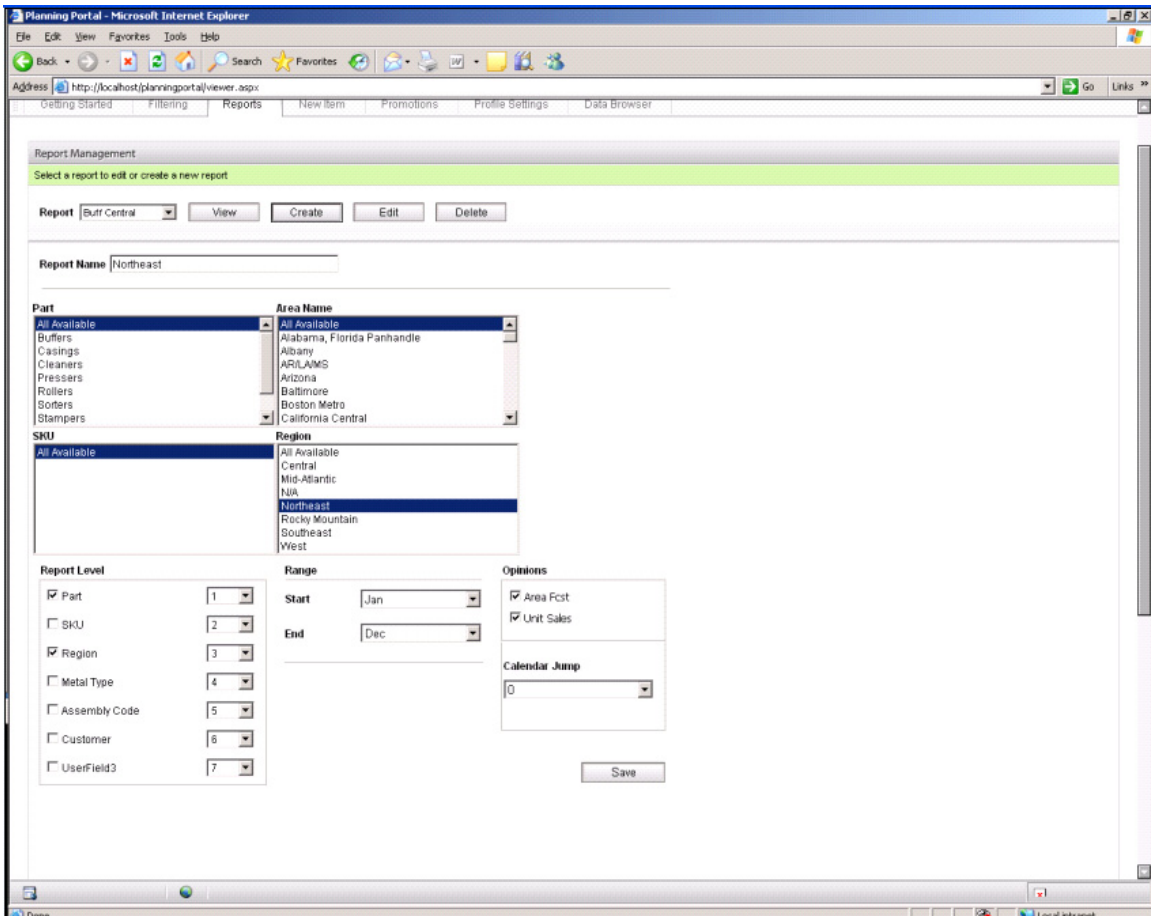
Part	Region	Opinion	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Buffers	Northeast	Unit Sales	2006	10	150	222	206	218	214	228	222	0	0	0	0	1,470
Buffers	Northeast	Area Fost	2006	44	102	175	222	181	226	238	233	194	160	88	72	1,935
Casings	Northeast	Unit Sales	2006	624	749	814	735	735	887	999	867	0	0	0	0	6,410
Casings	Northeast	Area Fost	2006	756	725	738	793	730	737	907	1,120	963	626	775	731	9,801
Cleaners	Northeast	Unit Sales	2006	20	34	28	21	12	151	392	410	0	0	0	0	1,068
Cleaners	Northeast	Area Fost	2006	26	107	56	66	894	107	214	318	294	291	276	276	2,894
Pressers	Northeast	Area Fost	2006	0	0	4	6	1	3	3	0	21	1	20	0	58
Pressers	Northeast	Unit Sales	2006	0	0	1	0	1	1	0	0	0	0	0	0	3
Rollers	Northeast	Unit Sales	2006	57	87	157	189	245	202	219	197	0	0	0	0	1,353
Rollers	Northeast	Area Fost	2006	41	72	117	215	216	229	190	142	113	88	61	71	1,534
Sorters	Northeast	Area Fost	2006	760	1,118	1,195	1,499	1,472	1,486	1,594	1,505	1,464	1,171	1,090	1,245	15,500
Sorters	Northeast	Unit Sales	2006	869	1,103	1,329	1,398	1,503	1,423	1,473	1,674	0	0	0	0	10,772
Stampers	Northeast	Unit Sales	2006	160	179	141	112	80	86	90	117	0	0	0	0	965
Stampers	Northeast	Area Fost	2006	140	158	143	137	106	102	101	87	75	71	58	60	1,238
Switches	Northeast	Area Fost	2006	72	98	223	334	310	251	281	267	268	226	154		2,766
Switches	Northeast	Unit Sales	2006	59	246	368	294	294	209	215	279	0	0	0	0	1,934
Valves	Northeast	Area Fost	2006	39	62	70	92	103	134	156	131	147	169	175	124	1,402
Valves	Northeast	Unit Sales	2006	71	89	101	139	148	141	166	164	0	0	0	0	1,019
Total		Unit Sales	2006	1,870	2,637	3,161	3,094	3,206	3,314	3,792	3,930	0	0	0	0	24,994
Total		Area Fost	2006	1,877	2,442	2,722	3,365	3,883	3,275	3,863	3,816	3,537	3,024	2,771	2,734	37,228

2. Select the viewing criteria from the View By drop down box.
3. Select the year from the Year drop down box.
4. Click on the Show Report button to update your changes.
5. Click the Export to Excel button to export the report to Microsoft Excel.
6. Click on the Close Window button when finished.

6-2: Create a Report

1. In the Report Management area, click on the Create button.

The Report Management area expands.



2. Type in a name for the new report in the Report Name text box.
3. Make your selections from each selection box. These selections are configured by your System Administrator.
4. In the Report Level area, select one or more Report Level options that you have configured. You can organize the options from left to right.
5. In the Opinions area, choose from the Opinion Lines that were configured by your System Administrator.

6. In the Calendar Jump area, select at which month you want your data to begin.
7. Click Save when finished.
8. Click View to view your report.

The Aggregate Report window displays.

Aggregate Report - Microsoft Internet Explorer

Aggregate Report Northeast

Year: View By:

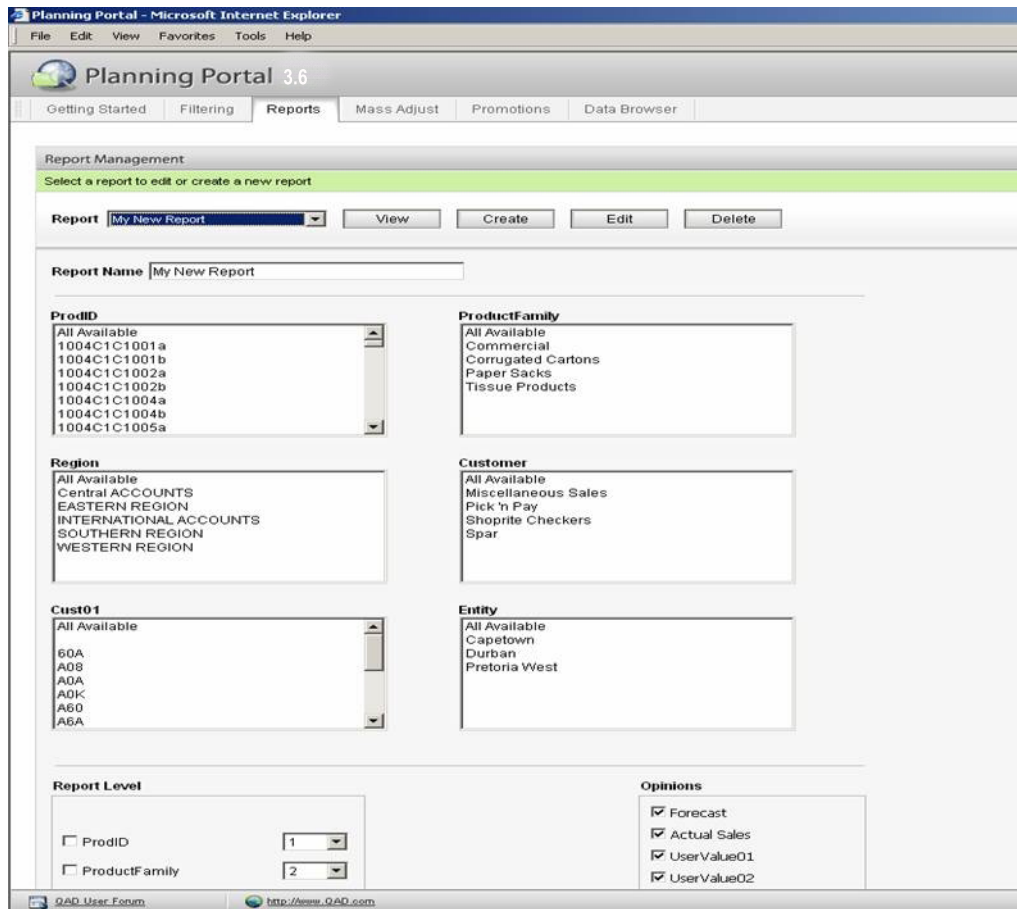
Part	Region	Opinion	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Buffers	Northeast	Unit Sales	2006	10	150	222	206	218	214	228	222	0	0	0	0	1,470
Buffers	Northeast	Area Fost	2006	44	102	175	222	181	226	238	233	194	160	88	72	1,935
Casings	Northeast	Unit Sales	2006	624	749	814	735	735	887	999	867	0	0	0	0	6,410
Casings	Northeast	Area Fost	2006	756	725	738	793	730	737	907	1,120	963	626	775	731	9,801
Cleaners	Northeast	Unit Sales	2006	20	34	28	21	12	151	392	410	0	0	0	0	1,068
Cleaners	Northeast	Area Fost	2006	26	107	56	66	894	107	214	318	294	291	276	276	2,894
Pressers	Northeast	Area Fost	2006	0	0	4	6	1	3	3	0	21	1	20	0	58
Pressers	Northeast	Unit Sales	2006	0	0	1	0	1	1	0	0	0	0	0	0	3
Rollers	Northeast	Unit Sales	2006	57	87	157	189	245	202	219	197	0	0	0	0	1,353
Rollers	Northeast	Area Fost	2006	41	72	117	215	216	229	190	142	113	68	61	71	1,534
Sorters	Northeast	Area Fost	2006	760	1,118	1,195	1,499	1,472	1,486	1,594	1,505	1,464	1,171	1,090	1,245	15,500
Sorters	Northeast	Unit Sales	2006	869	1,103	1,329	1,398	1,503	1,423	1,473	1,674	0	0	0	0	10,772
Stampers	Northeast	Unit Sales	2006	160	179	141	112	80	86	90	117	0	0	0	0	965
Stampers	Northeast	Area Fost	2006	140	158	143	137	106	102	101	87	75	71	56	60	1,238
Switches	Northeast	Area Fost	2006	72	98	223	334	310	251	281	281	267	268	226	154	2,766
Switches	Northeast	Unit Sales	2006	59	246	368	294	264	209	215	279	0	0	0	0	1,934
Valves	Northeast	Area Fost	2006	39	62	70	92	103	134	156	131	147	169	175	124	1,402
Valves	Northeast	Unit Sales	2006	71	89	101	139	148	141	166	164	0	0	0	0	1,019
Total		Unit Sales	2006	1,870	2,637	3,161	3,094	3,206	3,314	3,792	3,930	0	0	0	0	24,994
Total		Area Fost	2006	1,877	2,442	2,722	3,365	3,983	3,275	3,863	3,816	3,537	3,024	2,771	2,734	37,228

9. Click on Show Report to display the report. You can also click on the Export to Excel icon to export the report to Excel.
10. Click on Close Window when finished.

6-3: Edit a Report

1. In the Report Management area, click on the Edit button.

The Report Management area expands.



2. Make your edits as necessary.
3. Click Save when finished.

Section 7: New Item

The New Item feature enables you to create a new series in the Planning Portal. You are able to input what you want for your new series.

To create a new series:

1. From the New Item page, select Attributes from each drop down box that you want to apply to your new series.
2. Click Create.

The screenshot shows the 'Planning Portal 3.6' interface in Microsoft Internet Explorer. The browser's address bar shows 'Planning Portal - Microsoft Internet Explorer'. The page has a navigation menu with tabs: 'Getting Started', 'Filtering', 'Reports', 'New Item', 'Mass Adjust', 'Promotions', 'Profile Settings', 'Retagging', and 'Data Browser'. The 'New Item' tab is active. Below the navigation menu is a section titled 'New Item Link Management' with a green header bar containing the text 'Select attributes from each of the category dropdown lists to build your new item link'. The form contains four dropdown menus: 'ProdID' (selected: B108489C), 'ProductClass', 'ProductFamily' (selected: Commercial), and 'Customer' (selected: Pick 'n Pay'). A 'Create' button is located at the bottom right of the form.

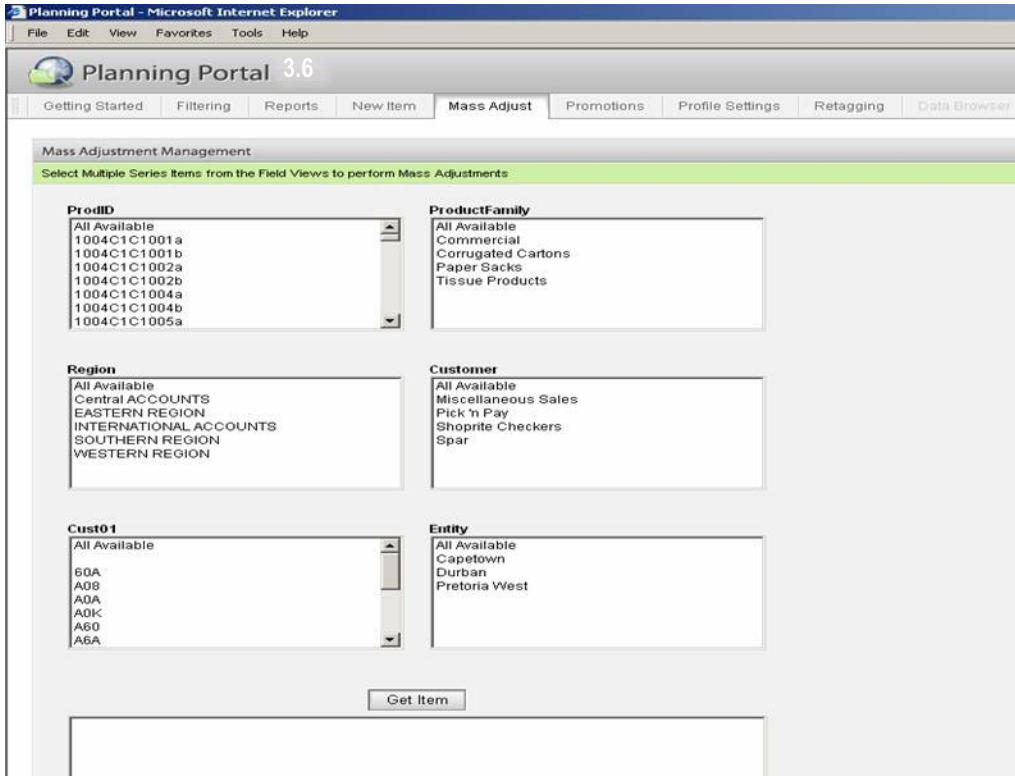
3. The message “New Item has been created successfully” displays when finished.

If the series already exists, you will get an error message.

Section 8: Mass Adjust

The Mass Adjust page consists of three different features:

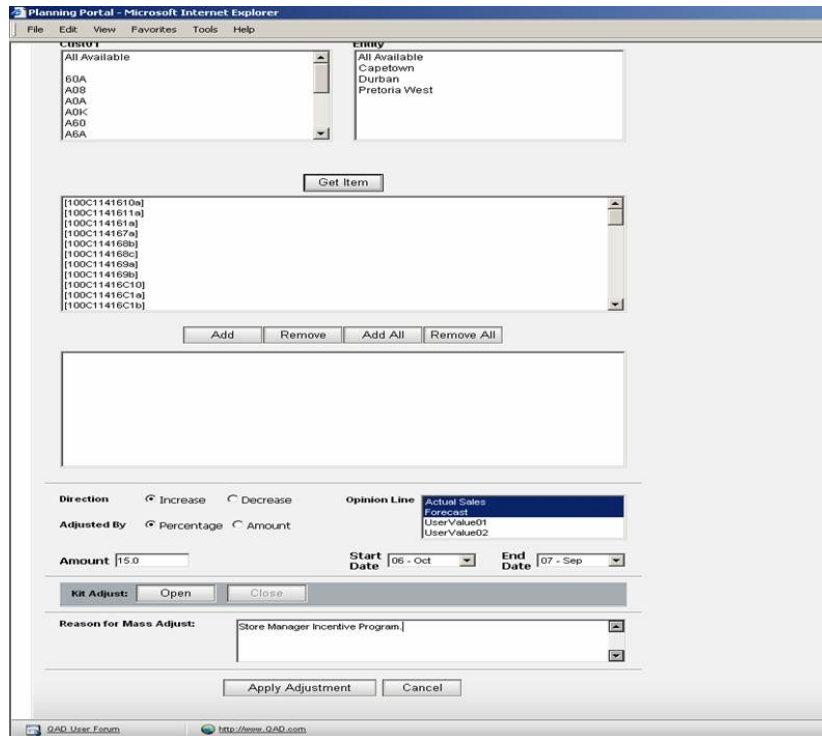
- Filter a series
- Select individual series to adjust
- Perform the adjustment



To filter for a series:

1. Select the filtering criteria you would like to use.
2. Click the Get Item button.

A list of all of the items that fit your filter are listed in the text box.



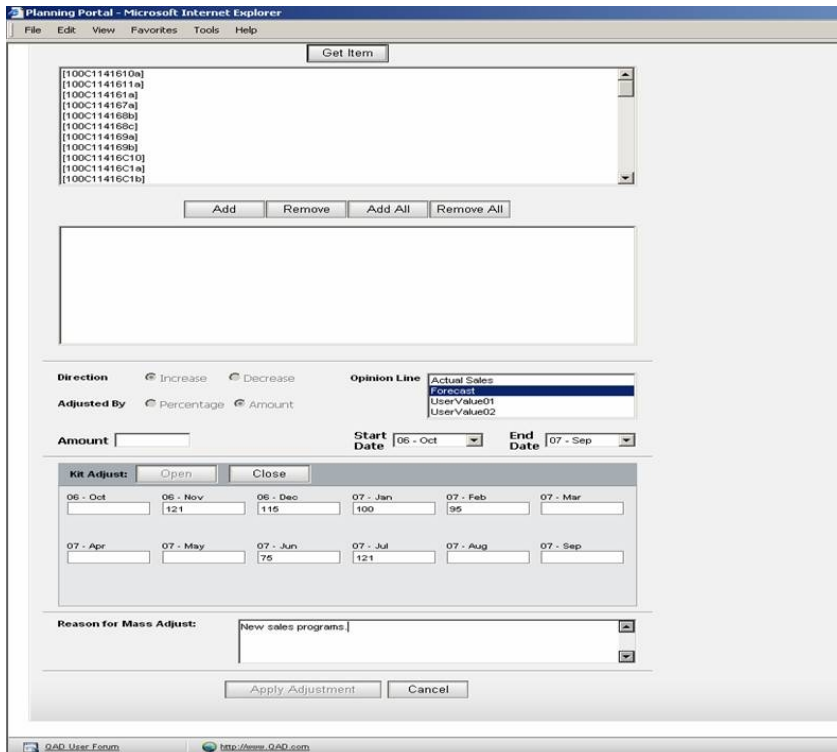
Select the series listed and move them below by clicking on the Add, or Add All buttons. The series you are adding are the series that will be part of your Mass Adjustment.

Alternatively, to remove a series or all series, click on the Remove or Remove All button.

3. In the Opinion Line area, select which Opinion Lines you would like to perform the adjustment.
4. Increase or decrease the value of the opinion line.
5. Select either Percentage or Amount in the Adjusted By area. Type in the numeric value for the amount or the percentage.

6. In the Start Date/End Date area, select the date range you would like to use in the adjustment.
7. In the Reason for Mass Adjust area, type in a description as to why you are performing a Mass Adjustment.
8. In the Kit Adjust area, click Open to open the Kit Adjust feature. This feature enables you to set certain values for certain periods. There is one field for each period within the date range you specified in the Start Date/End Date area. You must fill in each one of these periods. If any are left blank, you will get an error message.

The depiction below is the Kit Adjust feature.



9. Click the Apply Adjustment button when finished.

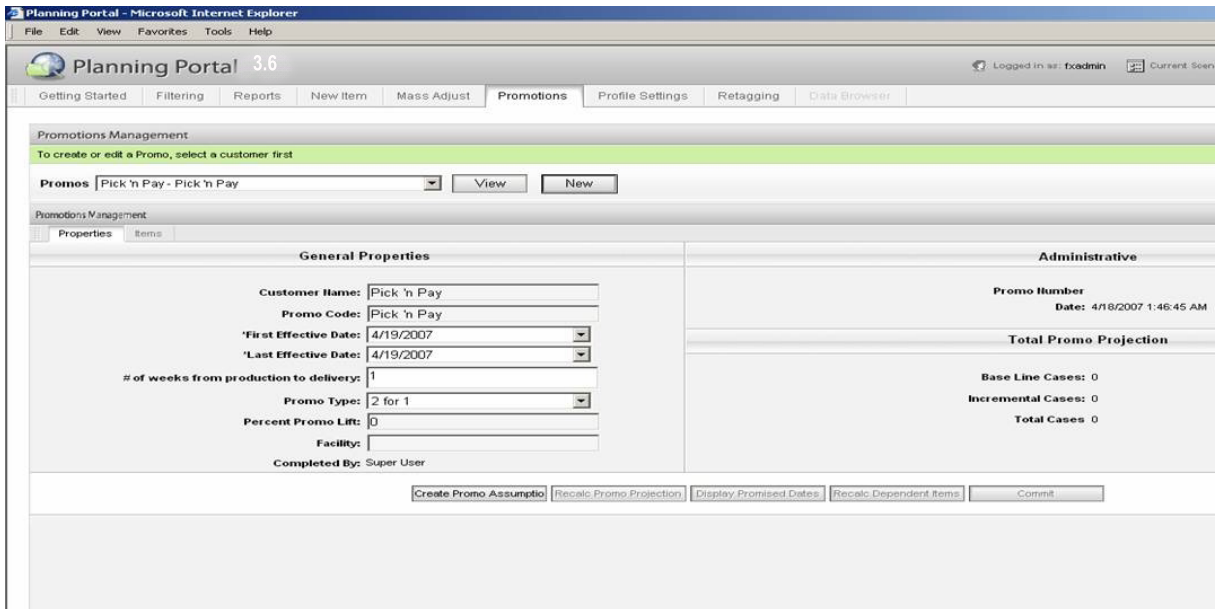
Section 9: Promotions

9-1: Create a New Promotion

To create a new Promotion:

1. From the Promotions page and Properties tab, select the criteria you would like to use from the Ads drop down box.
2. Click on New.

The Ad Assumption Builder displays with the Customer Name, Mkt Code data already entered.



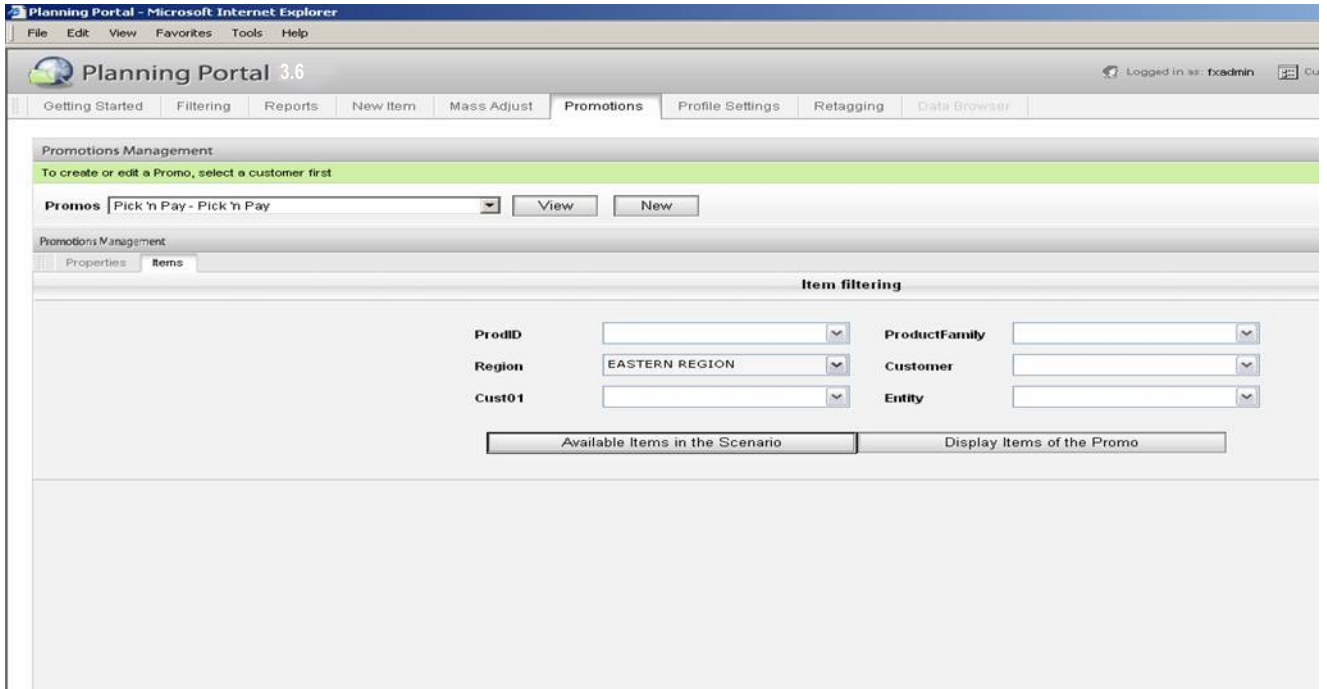
3. In the First Effective Date and Last Effective Date, select a date range.

The # of weeks from production to delivery text box displays the date range in weeks.

4. Select the Ad Type from the drop down box.

5. Type in the Percent Ad Lift.
6. Click Create Ad Assumption.
7. Click on the Items tab.

The depiction below is the Items page.



8. Select the items you want available for your Promotion.
9. Click the Available Items in the Scenario button.

The Available Items are displayed.

Planning Portal - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Planning Portal 3.6

Logged in as: fxadmin

Getting Started Filtering Reports New Item Mass Adjust Promotions Profile Settings Retagging Data browser

Promotions Management

To create or edit a Promo, select a customer first

Promos Pick 'n Pay - Pick 'n Pay View New

Promotions Management

Properties Items

Item filtering

ProdID ProductFamily

Region EASTERN REGION Customer

Cust01 Entity

Available Items in the Scenario Display Items of the Promo

Available Items

Add Items

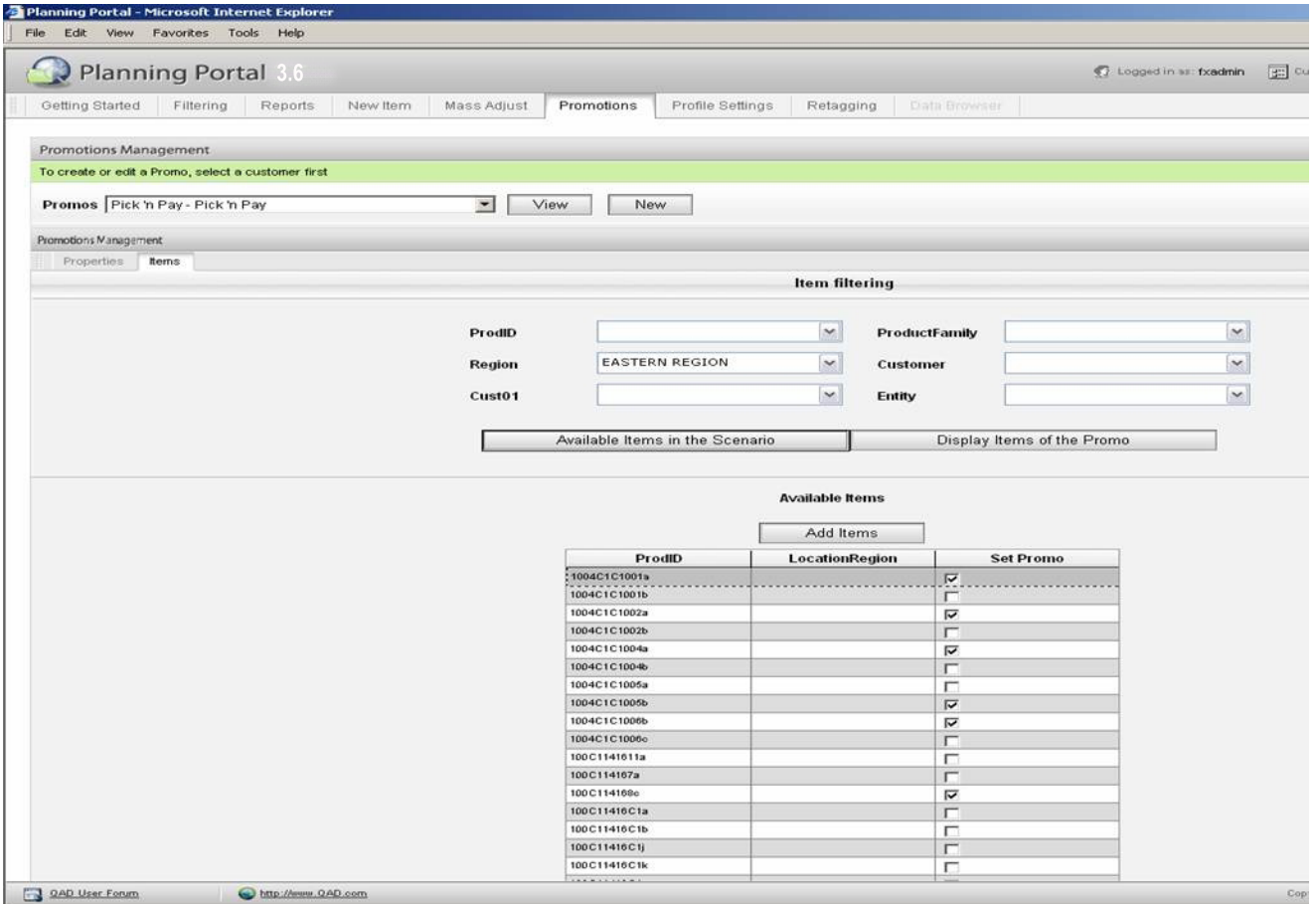
ProdID	LocationRegion	Set Promo
1004C1C1001a		<input type="checkbox"/>
1004C1C1001b		<input type="checkbox"/>
1004C1C1002a		<input type="checkbox"/>
1004C1C1002b		<input type="checkbox"/>
1004C1C1004a		<input type="checkbox"/>
1004C1C1004b		<input type="checkbox"/>
1004C1C1005a		<input type="checkbox"/>
1004C1C1005b		<input type="checkbox"/>
1004C1C1006b		<input type="checkbox"/>
1004C1C1006c		<input type="checkbox"/>
100C1141611a		<input type="checkbox"/>
100C114167a		<input type="checkbox"/>
100C114166c		<input type="checkbox"/>
100C11416C1a		<input type="checkbox"/>
100C11416C1b		<input type="checkbox"/>
100C11416C1j		<input type="checkbox"/>
100C11416C1k		<input type="checkbox"/>

QAD User Forum http://www.QAD.com

10. Select the Items that you would like in your Promotion by checking the Set Promo checkbox.

11. Click Add Items.

12. Click Display Items for the Ad to view the items.



13. Type in the Weekly Promo Amount Demand in the Weekly Promo Amt DMD textbox.

14. Type in the Regular Price amount.

15. Type in the Ad Allowance if you would like to apply a discount.

16. Click Save when finished.

17. Go back to the Properties tab.

18. Click on the Recalc Ad Projection button.

The total Ad Projection is displayed with the changes you had made to the items.

The screenshot shows the Planning Portal 3.6 interface in Microsoft Internet Explorer. The browser title is "Planning Portal - Microsoft Internet Explorer". The page header includes "Planning Portal 3.6" and a user login status "Logged in as: fxadmin". The navigation menu contains "Getting Started", "Filtering", "Reports", "New Item", "Mass Adjust", "Promotions", "Profile Settings", "Retagging", and "Data Browser".

The main content area is titled "Promotions Management" and includes a message: "To create or edit a Promo, select a customer first". Below this, there is a dropdown menu for "Promos" set to "Pick 'n Pay - Pick 'n Pay", with "View" and "New" buttons.

The "Properties" tab is selected, showing two sections:

- General Properties:**
 - Customer Name: Pick 'n Pay
 - Promo Code: Pick 'n Pay
 - First Effective Date: 4/19/2007
 - Last Effective Date: 4/19/2007
 - # of weeks from production to delivery: 1
 - Promo Type: 2 for 1
 - Percent Promo Lift: 0
 - Facility: (empty)
 - Completed By: Super User
- Administrative:**
 - Promo Number: 450558
 - Date: 4/18/2007 11:41:38 PM
 - Total Promo Projection:**
 - Base Line Cases: 0
 - Incremental Cases: 0
 - Total Cases: 0

At the bottom, there are several buttons: "Update Promo Assumptic", "Recalc Promo Projection" (highlighted), "Display Promised Dates", "Recalc Dependent Items", and "Commit". A message below the buttons states: "The Promo was properly saved."

- Click on Display Promised Dates to display your date range into equal percentages.

The screenshot shows the Planning Portal 3.6 interface. The main content area is titled 'Promotions Management' and contains a form for editing a promotion. The promotion is named 'Pick 'n Pay - Pick 'n Pay'. The form is divided into 'General Properties' and 'Administrative' sections. The 'General Properties' section includes fields for Customer Name, Promo Code, First Effective Date, Last Effective Date, # of weeks from production to delivery, Promo Type, Percent Promo Lift, and Facility. The 'Administrative' section includes fields for Promo Number and Date. Below the form are buttons for 'Update Promo Assumpti', 'Recalc Promo Projection', 'Display Promised Dates', 'Recalc Dependent Items', and 'Commit'. The 'Display Promised Dates' button is highlighted, and a table titled 'Promised Dates' is displayed below it. The table has two columns: 'Date' and 'Percentage'. The first row shows '2007/4/18 Wednesday' and '100'. Below the table is a 'Save Percentages' button.

Promised Dates	
2007/4/18 Wednesday	100

- Click on Recalc Dependent Items to recalculate the individual items' Ad Assumptions.
- Click Commit when finished to save your Promotion to the Living Master.

9-2: Updating a Promotion

1. In the Properties tab, click on the Promotion you want to Edit.
2. Change the Date Range or Percent Ad Lift.
3. Recalculate by clicking Recalc Ad Projection.
4. Click Commit to save your changes to the Living Master.

9-3: Updating a Promotion Item

1. In the Items tab, click on the Display Items of the Ad button.
2. Make desired changes
3. Click Save
4. Click Recalc Dependent Items button
5. Click Commit to save your changes to the Living Master.

9-4: Deleting a Promotion

1. In the Promotions tab, click on the Promotion you want to delete.
2. You will have the option to Open or Delete.
3. Click Delete
4. Confirm

9-5: Deleting a Promotion Item

1. In the Promotions tab, click the Items tab
2. Click on the Display Items of the Ad button.
3. Click Remove for the items you want to delete
4. Confirm

9-6: Changing Promotional Percentages

1. In the Promotions tab, click Properties
2. Click in Display Promise Dates
3. Make corresponding changes for percentages
4. Click Save
5. Click Recalc Dependent Items button
6. Recalculate by clicking Recalc Ad Projection

Section 10: Profile Settings

The Profile Settings feature is used to configure the Profile Forecast.

Planning Portal - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Planning Portal 3.6 Logged In as: fxadmin

Getting Started Filtering Reports New Item Mass Adjust Promotions **Profile Settings** Retagging Data Browser

Profile Settings

Items Properties

ProdID

All Available
1004C1C1001a
1004C1C1001b
1004C1C1002a
1004C1C1002b
1004C1C1004a
1004C1C1004b
1004C1C1005a

ProductFamily

All Available
Commercial
Corrugated Cartons
Paper Sacks
Tissue Products

Region

All Available
Central ACCOUNTS
EASTERN REGION
INTERNATIONAL ACCOUNTS
SOUTHERN REGION
WESTERN REGION

Customer

All Available
Miscellaneous Sales
Pick 'n Pay
Shoprite Checkers
Spar

Cust01

All Available
60A
A08
A0A
A0K
A60
A6A

Entity

All Available
Capetown
Durban
Pretoria West

Level Consumer Paper Products LM

Get items

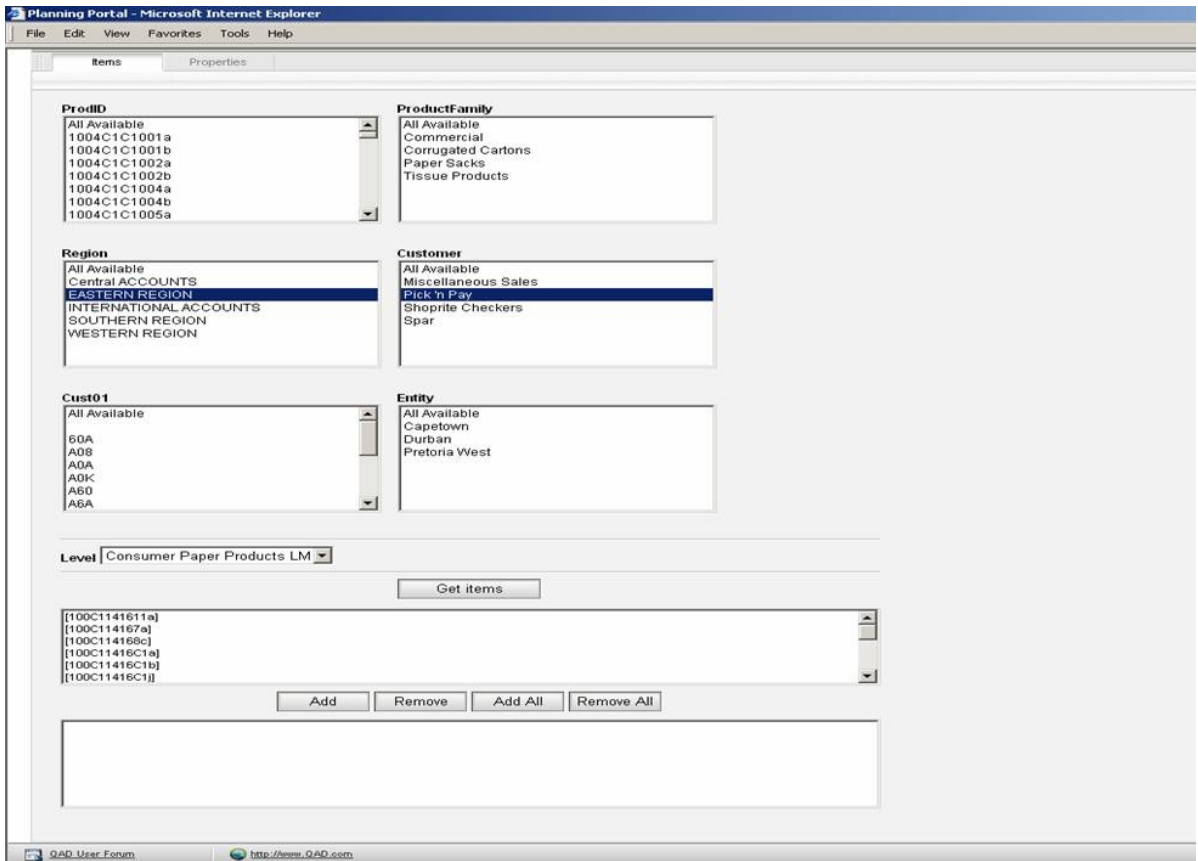
Add Remove Add All Remove All

QAD User Forum http://www.QAD.com

To filter items for a series:

1. Select the filtering criteria you would like to use.
2. Click the Get Items button.

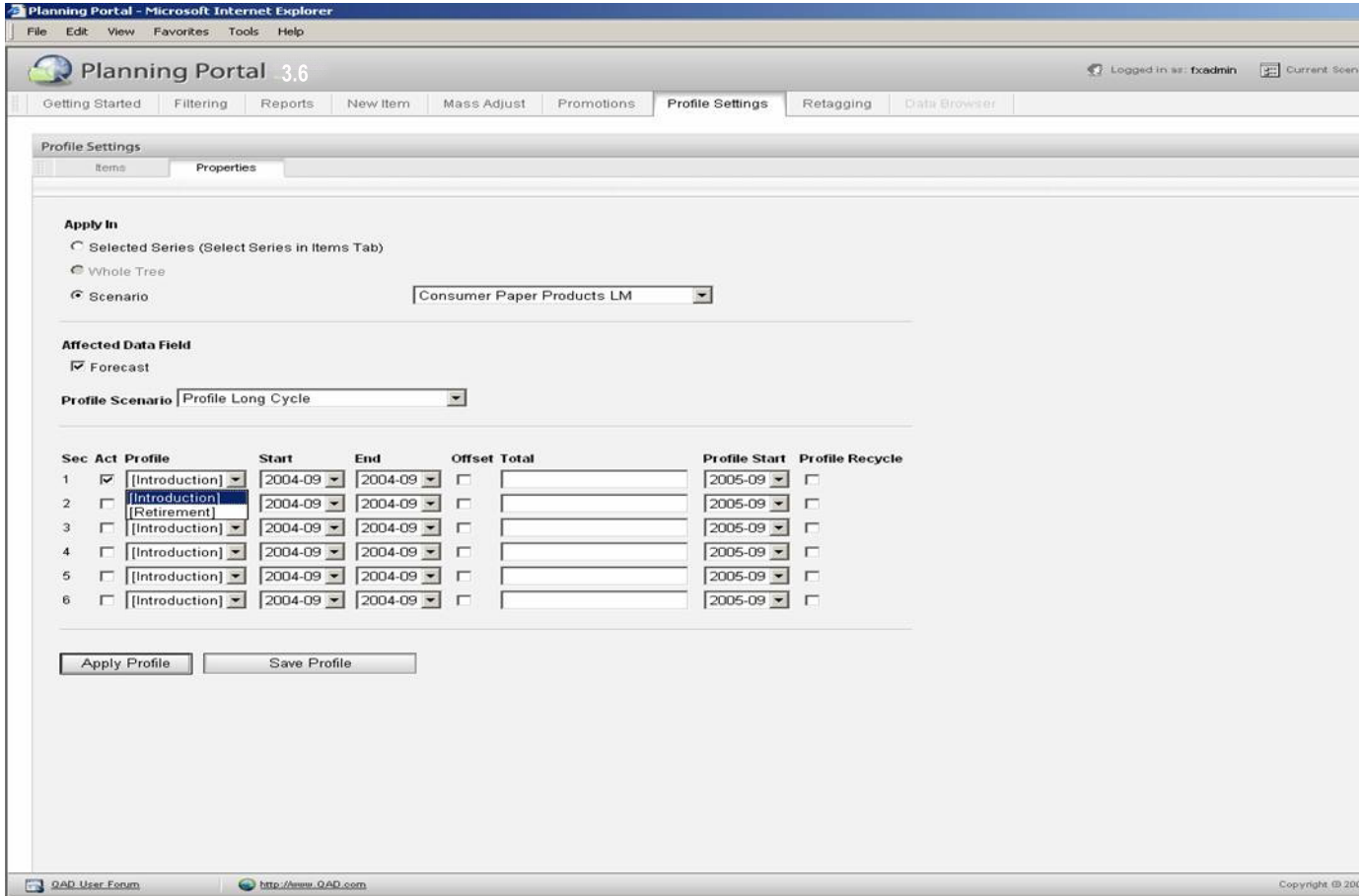
The Items you selected are listed in the textbox below the Get Items button.



3. Select the series listed and move them below by clicking on the Add, or Add All buttons. The series you are adding are the series that will be part of your Profile Forecast.

Alternatively, to remove a series or all series, click on the Remove or Remove All button.

4. Click on the Properties tab.



5. In the Apply In area, select one of the three options:

Description	
Selected Series	Series you have selected from the Items tab.
Whole Tree	Scenario in addition to everything in the hierarchy.
Scenario	Entire Scenario.

6. In Affected Data Field, select from opinion lines configured by the System Administrator.

7. From the Profile Scenario drop down, select which scenario contains the profiles.
8. Select the Profile from the drop-down box; there is one series listed for each series you have in your profile scenario.
9. Specify the date range in the Start/End drop down boxes.
10. Check the Offset box if you want it to offset to the Profile Start.
11. Specify a total in the Total text box if you want it to apply a numeric total across that range.
12. Check Profile Recycle if you want the profile to cycle over the date range.
13. Click Apply to apply settings to the selected items. Click Save to save settings.

Section 11: Retagging

Retagging is not available in the current release of the Planning Portal.

Index

C

Classic View 31

D

Data Browser 23

Demand Management Engine 5, 9

Detail View 26

E

Edit and View an Opinion Line in Summary View 24

Exceptions 5

H

hierarchy tree 26

I

Internet Information Services 9

Inventory Management 6

Inventory Management Tool 9

J

QAD Inc. Online Technical Support 11

L

Logging In 6

Logging Out 8

O

Opinion Line 9

P

Planning Portal 5

Planning Portal Highlights 6

R

Revision History 12

S

Screen Captures 9

Software License 10

System Administrator 8

U

User groups 8

V

View and Edit an Opinion Line in Classic View 32

View and Edit an Opinion Line in Detail View 28

