
Planning Portal User Guide

Planning Portal 4.0
Rev 1

Published—June 14, 2009

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Chapter 1 Introduction

This chapter includes:

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Section 1: Overview

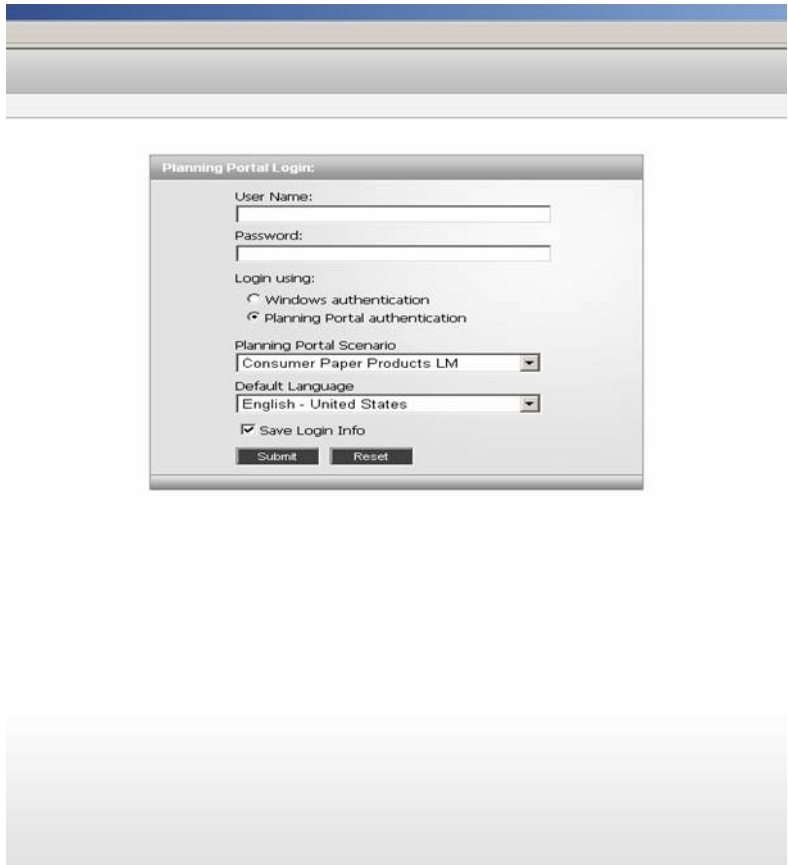
The most important part of the planning process is getting feedback from external participants to develop a better understanding of demand. Sharing information and managing Exceptions is the key to developing a productive relationship with customers and suppliers to develop a demand-driven supply chain. 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)
- 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

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Chapter 2 Using the Planning Portal

This chapter includes:

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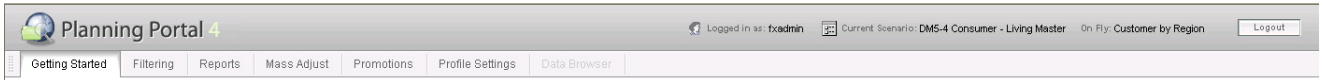
Section 1: Overview

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. |
| 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.

Planning Portal 4 Start Page

The Planning Portal provides "real time" collaboration to identify areas of the business that need forecast adjustments and allows for fast integration into the live demand plan. 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.




Data View Settings


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

View Type Detail ▾

| My Filters | My Reports |
|-------------------------------------|-------------------------------------|
| Select a filter | Select a report |
| (None) ▾ + | 7-Eleven ▾ + |
| Create New Filter + | Create New Report + |

My Exceptions

| Exceptions Name | Refresh Exception |
|---|--|
| Forecast Greater Than Sales |  |

 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. |

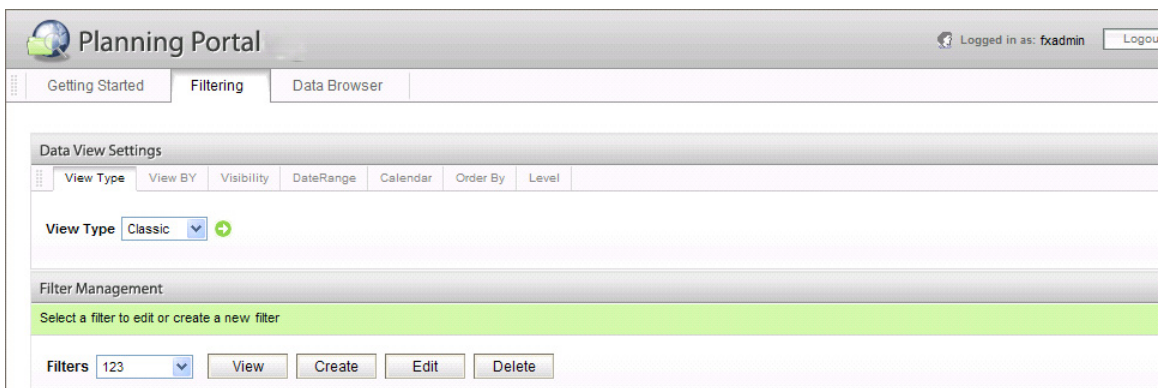
3-2: My Filters

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 [Section5: 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.

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.

| USER | EXCEPTION | SCENARIO | LEVEL |
|------|-----------|----------|-------|
| ed | ab | Calendar | 0 |
| ed | try me | a | 0 |
| ed | uh | Calendar | 1 |

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](#).

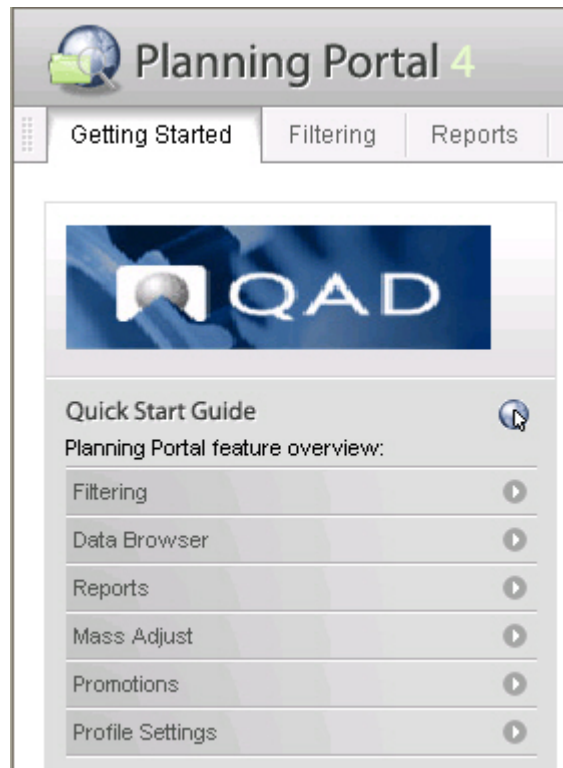
3-5: Miscellaneous Features

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

3-5-1: Planning Portal Quick Start Guide

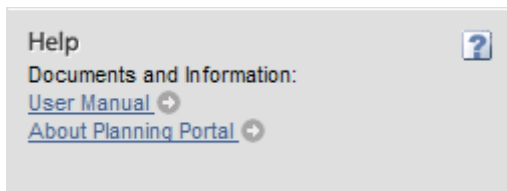
On the top left-side of the Getting Started page, you can access the PP Quick Start Guide by clicking on each of the PP features.

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



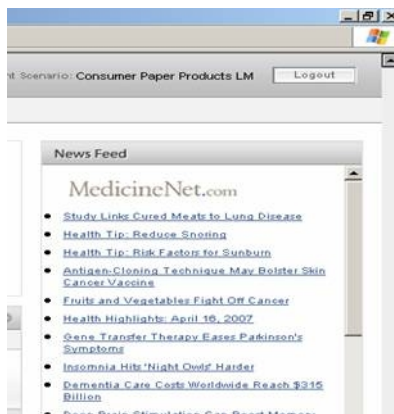
3-5-2: Planning Portal User Guide

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



Planning Portal 4 Logged in as: fxadmin | Current Scenario: DMS-4 Consumer - Living Master | Logout

Getting Started | Filtering | Reports | Mass Adjust | Promotions | Profile Settings | **Data Browser**

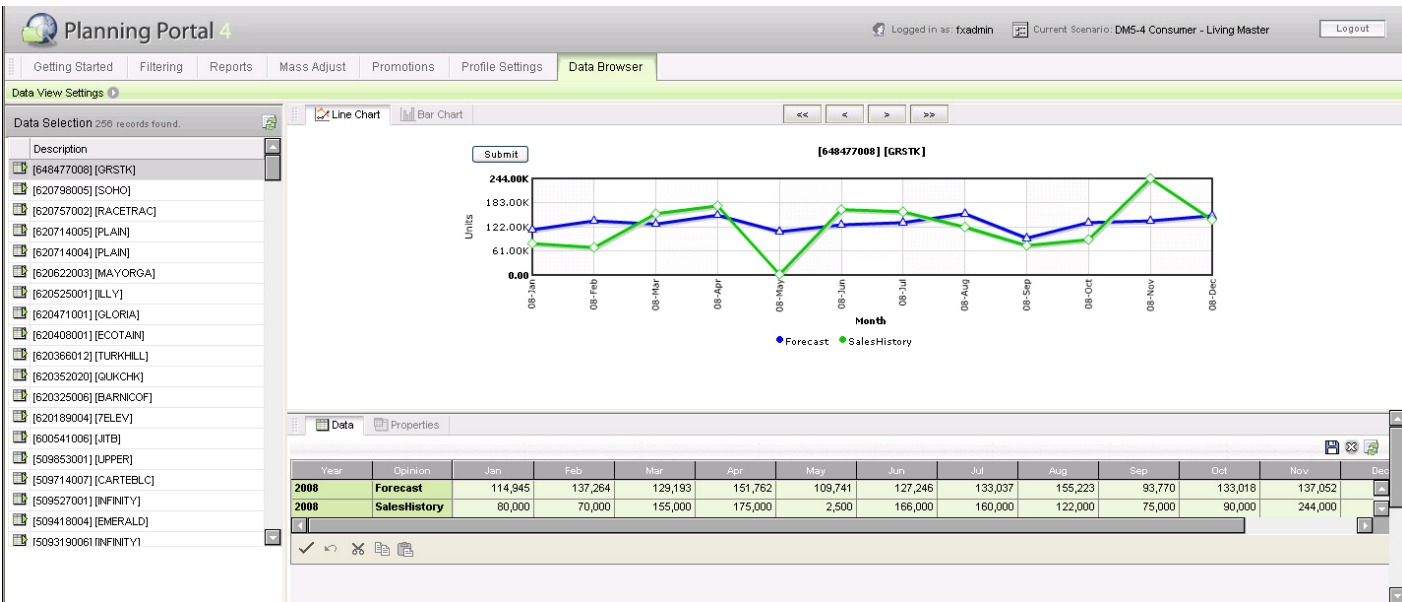
Data View Settings 266 Items found

Page: 1 Items per page: 10 Refresh Export Export All Filter Sku From: (All)

| Part | Site | Customer | PrimarySalesRep | Territory | Desc1 | Year | Opinion | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | No |
|-----------|------|----------|-----------------|-----------|---------|------|---------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|----|
| 648477008 | 031 | GRSTK | Yarmon, Tulin | 115 | RT-48 | 2007 | OriginalStatF | 111,274 | 131,458 | 139,447 | 146,072 | 112,201 | 129,752 | 136,551 | 140,700 | 111,873 | 126,810 | |
| 648477008 | 031 | GRSTK | Yarmon, Tulin | 115 | RT-48 | 2007 | Forecast | 111,274 | 131,458 | 139,447 | 146,072 | 112,201 | 129,752 | 136,551 | 140,700 | 111,873 | 126,810 | |
| 648477008 | 031 | GRSTK | Yarmon, Tulin | 115 | RT-48 | 2007 | SalesInput | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| 648477008 | 031 | GRSTK | Yarmon, Tulin | 115 | RT-48 | 2007 | SalesHistory | 117,500 | 120,000 | 120,000 | 110,000 | 110,000 | 110,000 | 105,000 | 163,000 | 132,500 | 197,000 | |
| 648477008 | 031 | GRSTK | Yarmon, Tulin | 115 | RT-48 | 2008 | OriginalStatF | 114,945 | 137,264 | 129,193 | 151,762 | 109,741 | 127,246 | 133,037 | 155,223 | 93,770 | 133,018 | |
| 648477008 | 031 | GRSTK | Yarmon, Tulin | 115 | RT-48 | 2008 | Forecast | 114,945 | 137,264 | 129,193 | 151,762 | 109,741 | 127,246 | 133,037 | 155,223 | 93,770 | 133,018 | |
| 648477008 | 031 | GRSTK | Yarmon, Tulin | 115 | RT-48 | 2008 | SalesInput | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| 648477008 | 031 | GRSTK | Yarmon, Tulin | 115 | RT-48 | 2008 | SalesHistory | 80,000 | 70,000 | 155,000 | 175,000 | 2,500 | 166,000 | 160,000 | 122,000 | 75,000 | 90,000 | |
| 648477008 | 031 | GRSTK | Yarmon, Tulin | 115 | RT-48 | 2009 | OriginalStatF | 90,975 | 126,611 | 152,980 | 148,671 | 90,975 | 126,611 | 152,980 | 148,671 | 90,975 | 126,611 | |
| 648477008 | 031 | GRSTK | Yarmon, Tulin | 115 | RT-48 | 2009 | Forecast | 90,975 | 126,611 | 152,980 | 148,671 | 90,975 | 126,611 | 152,980 | 148,671 | 90,975 | 126,611 | |
| 648477008 | 031 | GRSTK | Yarmon, Tulin | 115 | RT-48 | 2009 | SalesInput | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| 648477008 | 031 | GRSTK | Yarmon, Tulin | 115 | RT-48 | 2009 | SalesHistory | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| 620798005 | 031 | SOHO | House | 901 | RCDK-20 | 2007 | OriginalStatF | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | |
| 620798005 | 031 | SOHO | House | 901 | RCDK-20 | 2007 | Forecast | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | |
| 620798005 | 031 | SOHO | House | 901 | RCDK-20 | 2007 | SalesInput | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| 620798005 | 031 | SOHO | House | 901 | RCDK-20 | 2007 | SalesHistory | 245,000 | 333,600 | 286,800 | 184,800 | 302,400 | 272,400 | 189,600 | 232,800 | 264,000 | 270,000 | |
| 620798005 | 031 | SOHO | House | 901 | RCDK-20 | 2008 | OriginalStatF | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | |
| 620798005 | 031 | SOHO | House | 901 | RCDK-20 | 2008 | Forecast | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | |
| 620798005 | 031 | SOHO | House | 901 | RCDK-20 | 2008 | SalesInput | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| 620798005 | 031 | SOHO | House | 901 | RCDK-20 | 2008 | SalesHistory | 461,200 | 240,000 | 190,800 | 253,200 | 189,600 | 75,600 | 193,200 | 94,800 | 226,800 | 201,600 | |
| 620798005 | 031 | SOHO | House | 901 | RCDK-20 | 2009 | OriginalStatF | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | |
| 620798005 | 031 | SOHO | House | 901 | RCDK-20 | 2009 | Forecast | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | |



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.



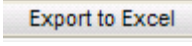
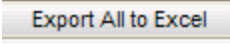
[648477008] [GRSTK]

| Year | Opinion | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|------|--------------|---------|---------|---------|---------|---------|---------|---------|---------|--------|---------|---------|-----|
| 2008 | Forecast | 114,945 | 137,264 | 129,193 | 151,762 | 109,741 | 127,246 | 133,037 | 155,223 | 93,770 | 133,018 | 137,052 | |
| 2008 | SalesHistory | 80,000 | 70,000 | 155,000 | 175,000 | 2,500 | 166,000 | 160,000 | 122,000 | 75,000 | 90,000 | 244,000 | |

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.*

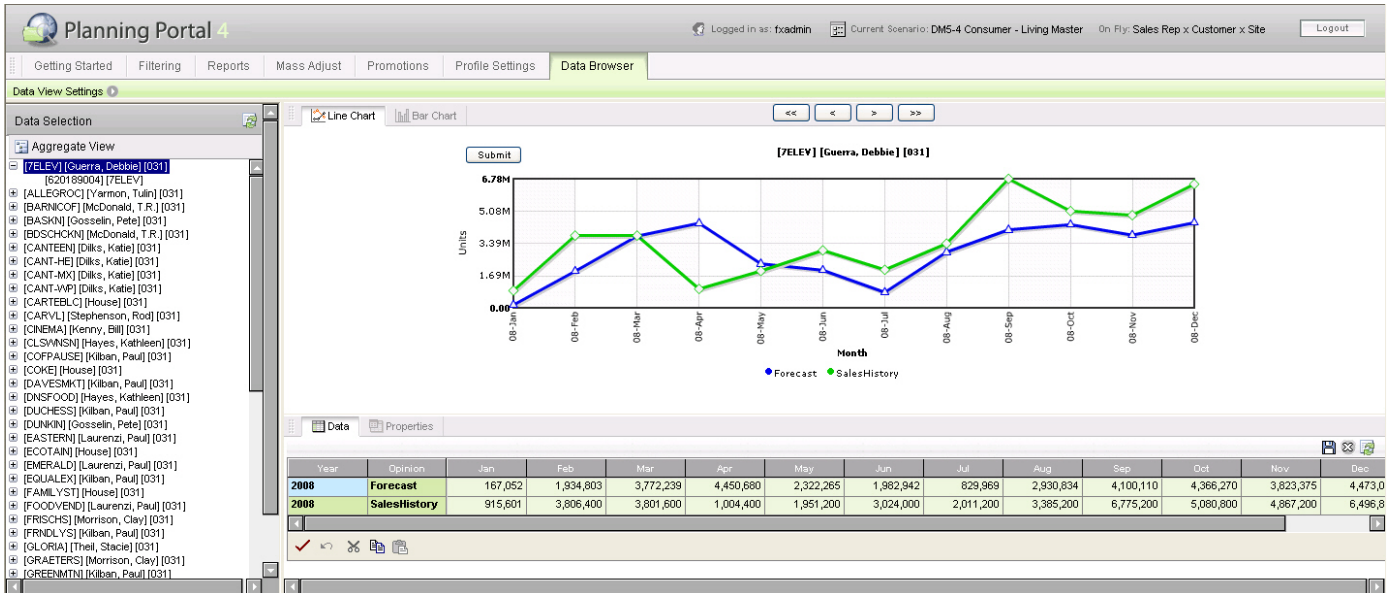
4-2: Detail View


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

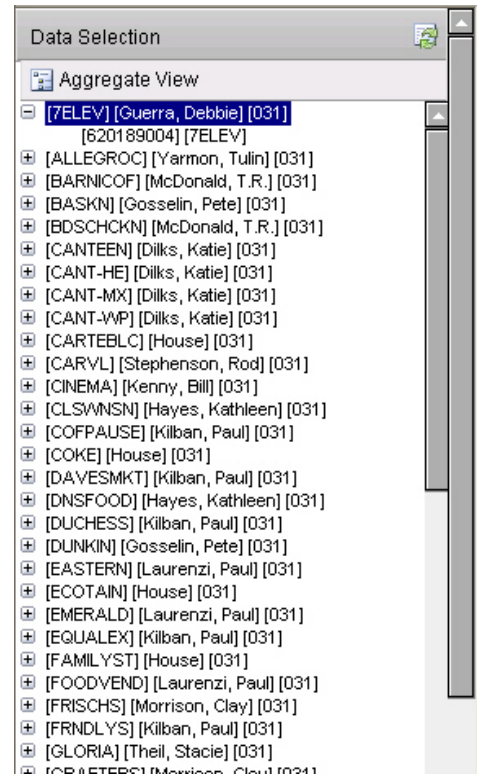
4-2-1: Detail View Highlights


- 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

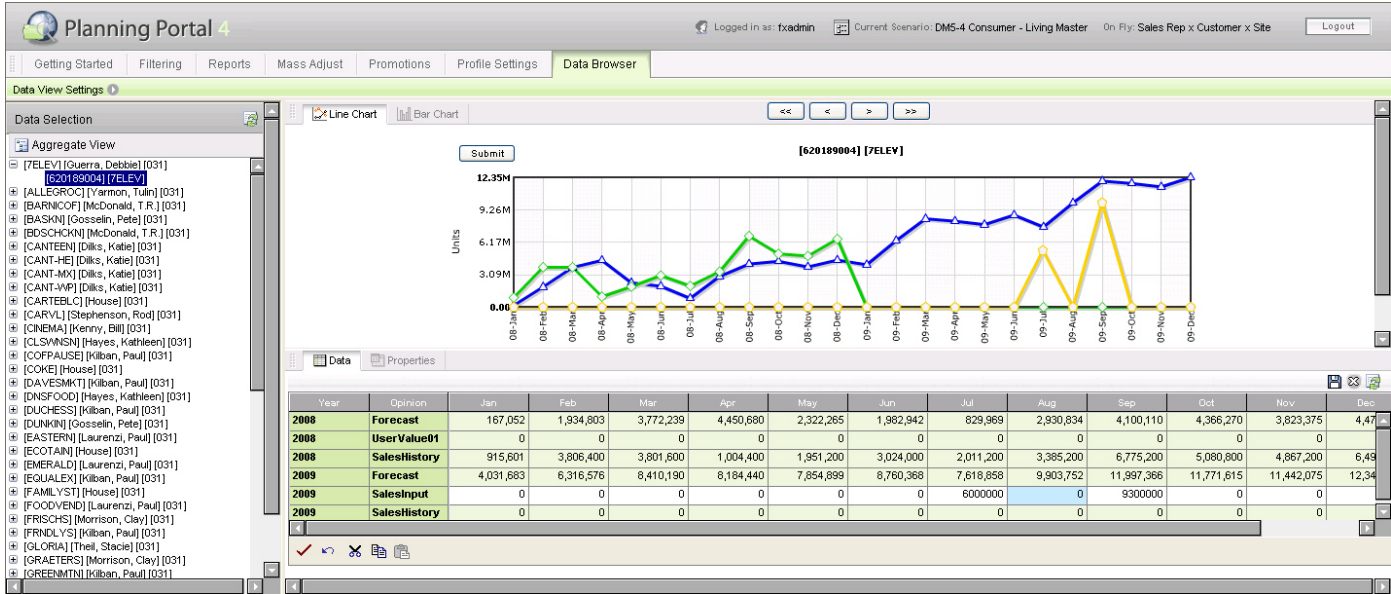


1. In the Aggregate View section in the left-hand pane, click on the  icon to expand the list.



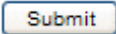
- Click on the  buttons to scroll through the items.

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



[620189004] [7ELEV]

| Year | Opinion | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|------|--------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------|------------|------------|-------|
| 2008 | Forecast | 167,052 | 1,934,803 | 3,772,239 | 4,450,680 | 2,322,265 | 1,982,942 | 829,969 | 2,930,834 | 4,100,110 | 4,366,270 | 3,823,375 | 4,47 |
| 2008 | UserValue01 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2008 | SalesHistory | 915,601 | 3,806,400 | 3,801,600 | 1,004,400 | 1,951,200 | 3,024,000 | 2,011,200 | 3,385,200 | 6,775,200 | 5,080,800 | 4,867,200 | 6,49 |
| 2009 | Forecast | 4,031,683 | 6,316,576 | 8,410,190 | 8,184,440 | 7,654,899 | 8,760,368 | 7,618,858 | 9,903,752 | 11,997,366 | 11,771,615 | 11,442,075 | 12,34 |
| 2009 | SalesInput | 0 | 0 | 0 | 0 | 0 | 0 | 6000000 | 0 | 9300000 | 0 | 0 | 0 |
| 2009 | SalesHistory | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

- 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.

Data Selection

- [-] [7ELEV] [Guerra, Debbie] [031]
 - [620189004] [7ELEV]
- [+] [ALLEGROC] [Yarmon, Tulin] [031]
- [+] [BARNICOF] [McDonald, T.R.] [031]
- [+] [BASKN] [Gosselin, Pete] [031]
- [+] [BDSCHCKN] [McDonald, T.R.] [031]
- [+] [CANTEEN] [Dilks, Katie] [031]
- [+] [CANT-HE] [Dilks, Katie] [031]
- [+] [CANT-MX] [Dilks, Katie] [031]
- [+] [CANT-WVP] [Dilks, Katie] [031]
- [+] [CARTEBLCL] [House] [031]
- [+] [CARVL] [Stephenson, Rod] [031]
- [+] [CINEMA] [Kenny, Bill] [031]
- [+] [CLSWNSN] [Hayes, Kathleen] [031]
- [+] [COFFPAUSE] [Kilban, Paul] [031]
- [+] [COKE] [House] [031]
- [+] [DAVESMKT] [Kilban, Paul] [031]
- [+] [DNSFOOD] [Hayes, Kathleen] [031]
- [+] [DUCHESS] [Kilban, Paul] [031]
- [+] [DUNKIN] [Gosselin, Pete] [031]
- [+] [EASTERN] [Laurenzi, Paul] [031]
- [+] [ECOTAIN] [House] [031]
- [+] [EMERALD] [Laurenzi, Paul] [031]
- [+] [EQUALEX] [Kilban, Paul] [031]
- [+] [FAMILYST] [House] [031]
- [+] [FOODVEND] [Laurenzi, Paul] [031]
- [+] [FRISCHS] [Morrison, Clay] [031]
- [+] [FRNDLYS] [Kilban, Paul] [031]
- [+] [GLORIA] [Theil, Stacie] [031]
- [+] [GRAETERS] [Morrison, Clay] [031]
- [+] [GREENMTN] [Kilban, Paul] [031]

Line Chart

Submit

Units

08-Jan 08-Feb 08-Mar 08-Apr 08-May 08-Jun 08-Jul 08-Aug 08-Sep 08-Oct

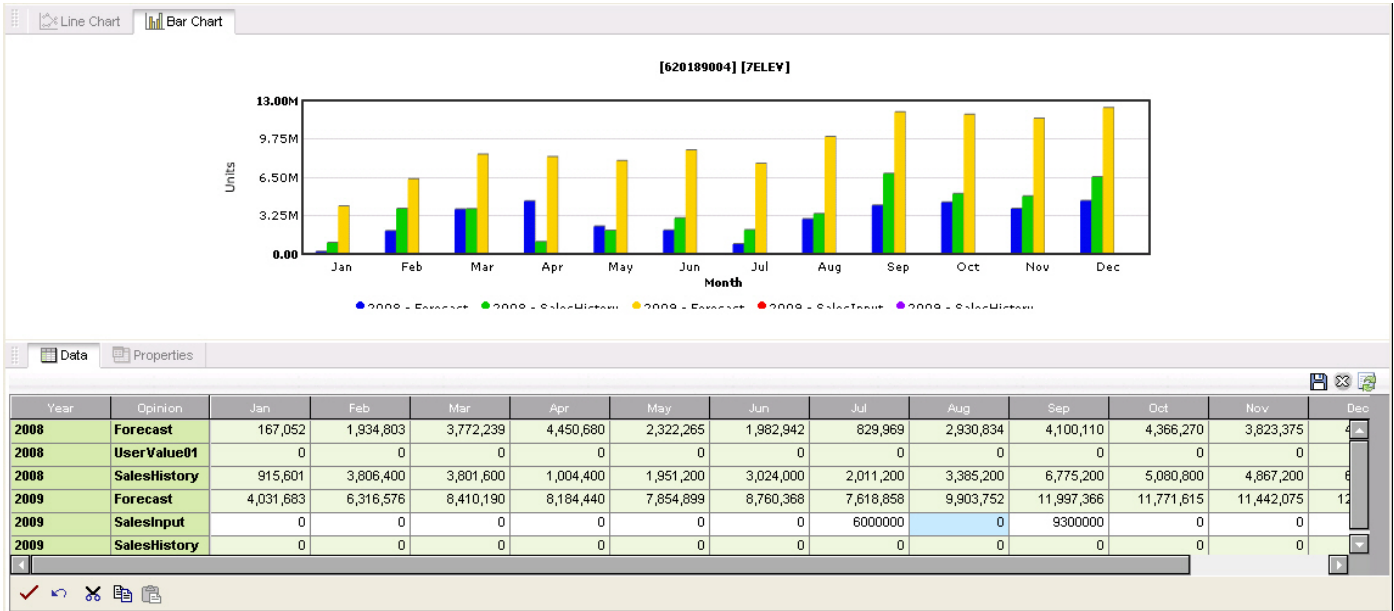
0.00 3.09M 6.17M 9.26M 12.35M


Properties

| Field | Value |
|-----------------|-----------------------|
| Part | 620189004 |
| Site | 031 |
| Customer | 7ELEV |
| PrimarySalesRep | Guerra, Debbie |
| Territory | 210 |
| Desc1 | RCDW-20 7-11 OH THANK |


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 shows the Planning Portal interface in a Microsoft Internet Explorer browser. The page title is "Planning Portal 4". The user is logged in as "tadmin" and the current scenario is "Consumer Paper Products LM". The "Data Browser" tab is active, showing a list of 42 items. Two items are expanded to show their data tables.



Item 1: 100C11416C1b

| Year | Quinon | 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 | 3.00 | 6.00 |
| 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 | | | | 6.00 |
| 2007 | Budget | 1.00 | 0.00 | 33.00 | 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 |

Item 2: 100C11416C1d

| Year | Quinon | 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 | 0.00 | 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 | 16.00 |
| 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 | 8.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 32.00 |
| 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.

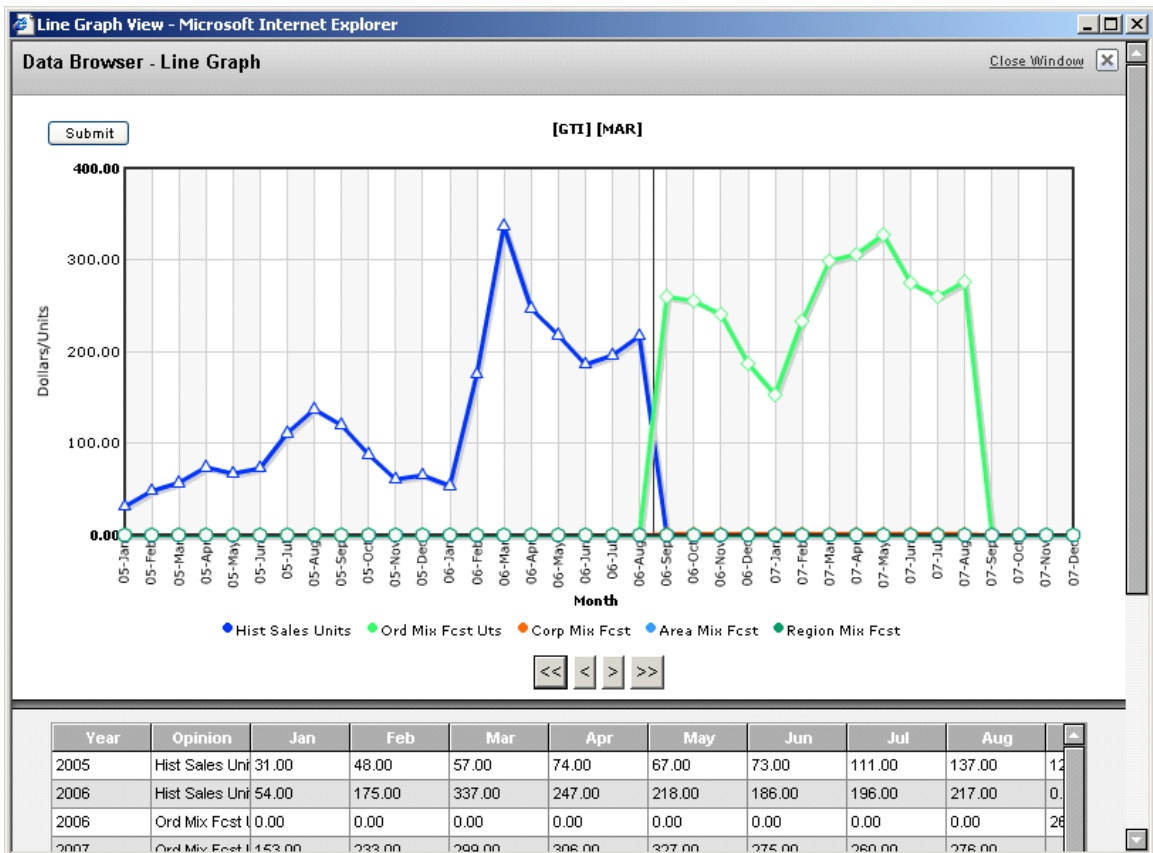
1. Click on the  icons to browse through the data.
2. From the Series Per Page, select how many series you want displayed.
3. To jump to a certain page, select the page number from the Go To Page drop down box.
4. Click on the  icon to refresh your page.

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.*

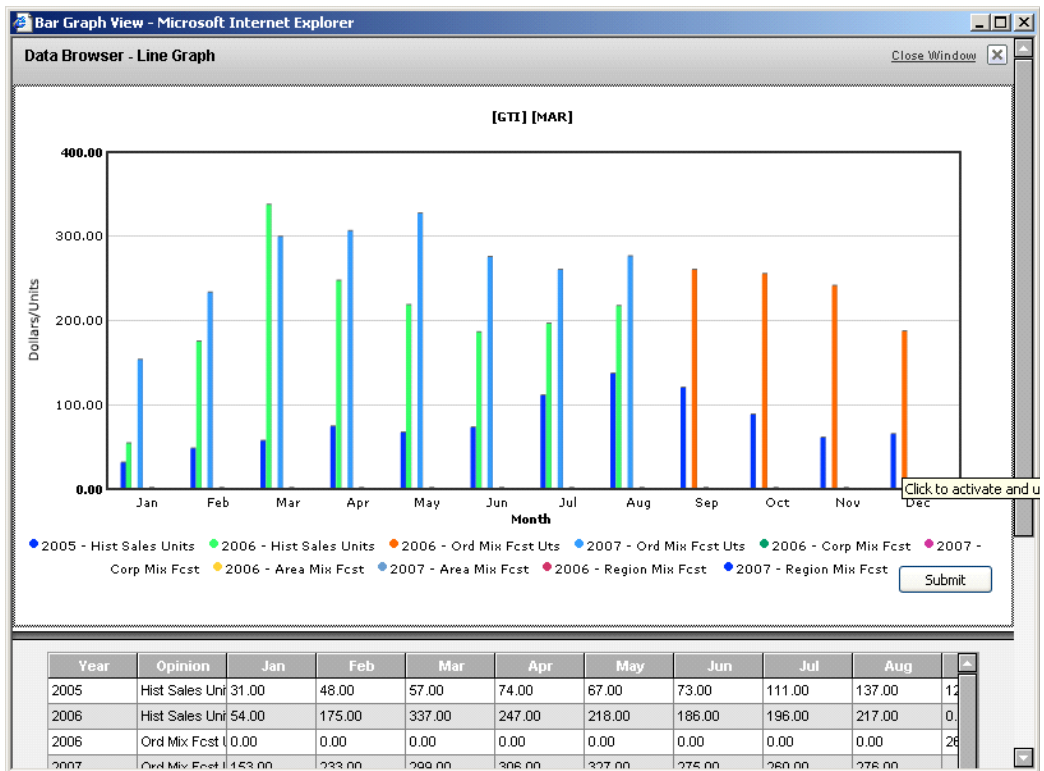
1. In the grid, type in the new value.

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.*

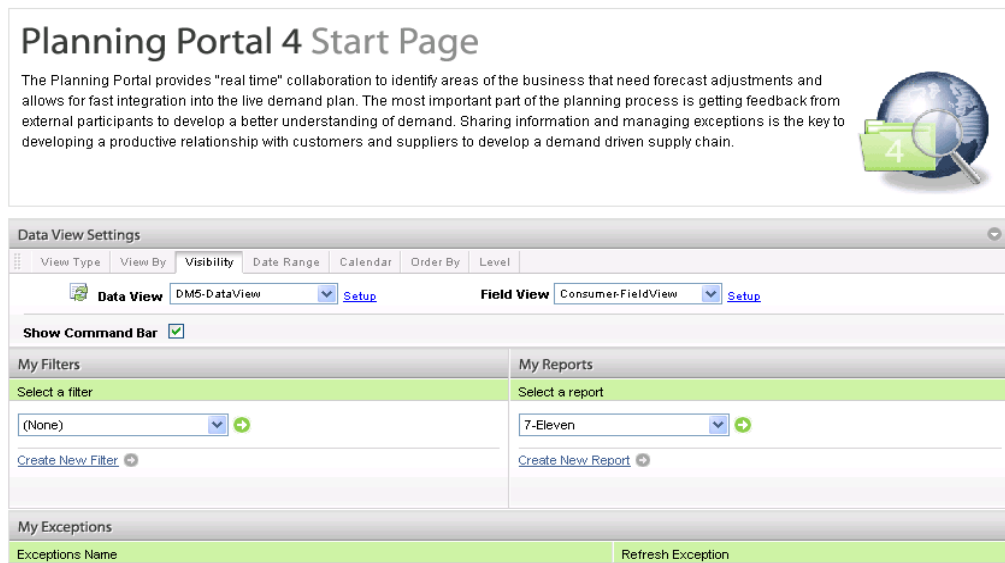
4-4: Data and Field Views - Altering

Because users place great value in the ability to enter as much data as possible without scrolling or using a mouse, new data and user field view functionality was added.

- Ability to select a view assigned by the administrator and create an altered version
- Ability to delete the altered views which has been created by the user.

4-4-1: Data and Field View – Altering: Setup Activities

Data and Field View alterations are accessible through setup activities found in the Planning Portal’s Data View Settings under the Visibility tab.

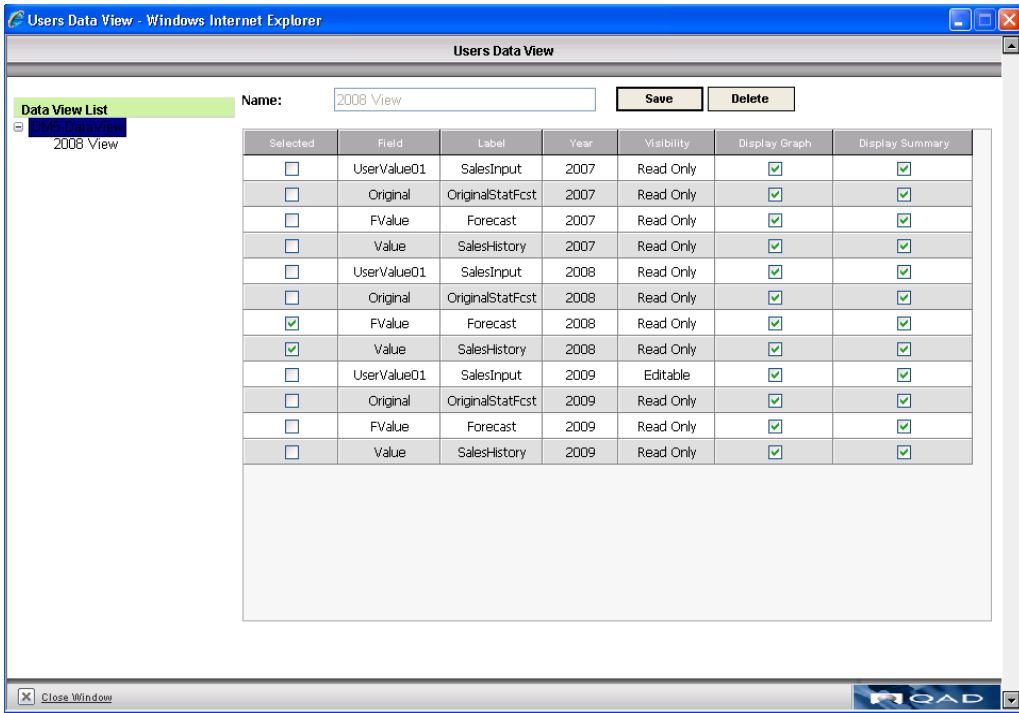


Data and Field View Setup Selection

To change data view settings, select the Setup text to the right of the Data View selector. This carries the user to the Users Data View selection screen. Users have the option to select or turn off available data series fields by year they would like to have appear in the classic, detail or summary views. Data Series must already exist in the Demand Management Engine. Further options exist to turn on or off graphical displays.

Name and save the altered view. It will appear beneath the standard Data View as an optional selection. To delete altered views, highlight the view and select delete.

Please note: The window must be refreshed for the altered data view to appear in the Data View Settings display.

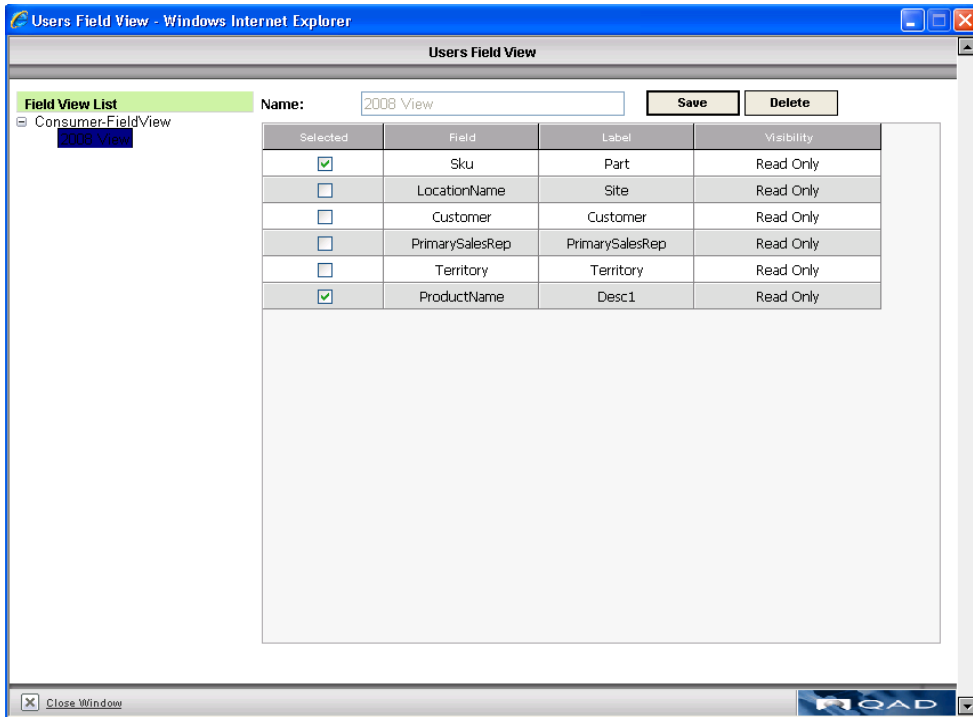


Altering User Data View

To change field view settings, select the Setup text to the right of the Field View selector. This carries the user to the Users Field View selection screen. Users have the option to select or turn off available attributes they would like to have appear in the classic, detail or summary views. Attributes must already exist in the Demand Management Engine.

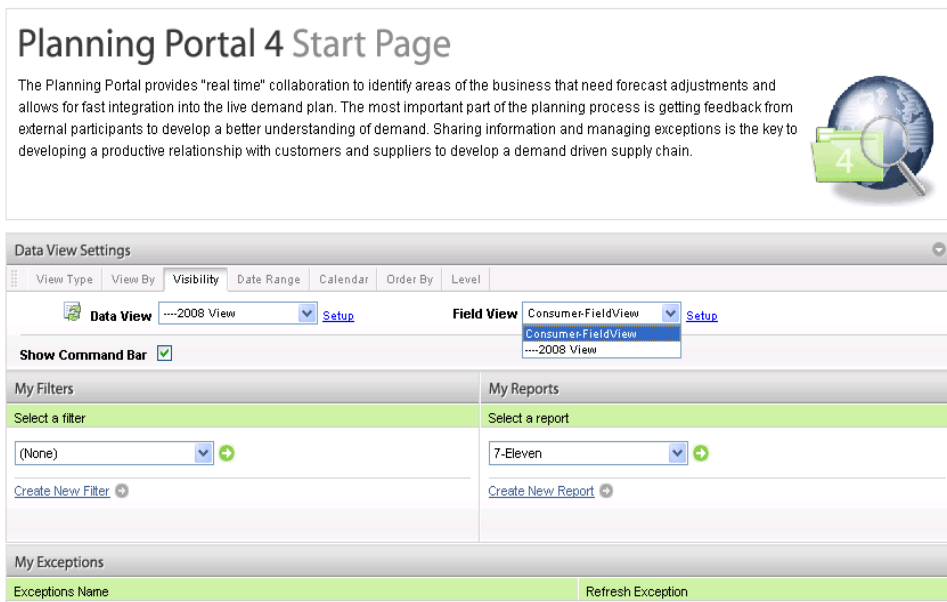
Name and save the altered view. It will appear beneath the standard Field View as an optional selection. To delete altered views, highlight the view and select delete.

Please note: The window must be refreshed for the altered data view to appear in the Data View Settings display.



Altering User Field View

To use the new user data and field views, select the Visibility tab and click on the appropriate Data or Field View pull down arrow. The list of altered views should now be available. If they don't refresh the screen. Different combinations of data and field views can be used to present information in the classic, detail, or summary views as desired. Select the views and choose your required filter or exception.



Selecting Altered Views

Planning Portal 4

Getting Started | Filtering | Reports | Mass Adjust | Data Browser

Data View Settings

Page: 1 | Items per page: 10 | Refresh | Export | Export All | Filter Sku From: (All)

| Prt | Desc1 | Year | Opinion | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
|-----------|---------|------|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------|
| 648477008 | RT-48 | 2008 | Forecast | 114,945 | 137,264 | 129,193 | 151,762 | 109,741 | 127,246 | 133,037 | 155,223 | 93,770 | 133,018 | 137,052 | 150,275 | 1,572,522 |
| 648477008 | RT-48 | 2008 | SalesHistory | 80,000 | 70,000 | 155,000 | 175,000 | 2,500 | 166,000 | 160,000 | 122,000 | 75,000 | 90,000 | 244,000 | 139,500 | 1,479,000 |
| 620798005 | RCDK-20 | 2008 | Forecast | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 2,865,600 |
| 620798005 | RCDK-20 | 2008 | SalesHistory | 481,200 | 240,000 | 190,800 | 253,200 | 189,600 | 75,600 | 193,200 | 94,800 | 228,800 | 201,600 | 231,600 | 238,800 | 2,617,200 |
| 620757002 | RCDK-20 | 2008 | Forecast | 503,411 | 742,886 | 443,271 | 402,648 | 586,020 | 505,794 | 439,196 | 722,915 | 673,213 | 1,039,785 | 1,578,776 | 601,674 | 8,239,585 |
| 620757002 | RCDK-20 | 2008 | SalesHistory | 484,800 | 597,600 | 663,600 | 321,600 | 891,600 | 516,000 | 447,600 | 867,600 | 652,800 | 1,065,600 | 1,280,400 | 816,000 | 8,605,200 |
| 620714005 | RCDW-20 | 2008 | Forecast | 140,381 | 182,965 | 105,606 | 139,213 | 108,810 | 91,793 | 150,003 | 127,806 | 216,588 | 157,802 | 88,206 | 109,802 | 1,618,768 |
| 620714005 | RCDW-20 | 2008 | SalesHistory | 174,000 | 243,600 | 96,000 | 118,800 | 92,400 | 104,400 | 146,400 | 118,800 | 237,600 | 156,000 | 79,200 | 106,800 | 1,674,000 |
| 620714004 | RCDK-20 | 2008 | Forecast | 440,400 | 440,400 | 440,400 | 440,400 | 440,400 | 440,400 | 440,400 | 440,400 | 440,400 | 440,400 | 440,400 | 440,400 | 5,284,800 |
| 620714004 | RCDK-20 | 2008 | SalesHistory | 332,400 | 735,600 | 351,600 | 403,200 | 279,600 | 488,400 | 484,800 | 384,800 | 430,800 | 585,600 | 552,000 | 440,400 | 5,449,200 |
| 620622003 | RCDW-20 | 2008 | Forecast | 168,076 | 126,921 | 111,068 | 48,340 | 166,271 | 140,854 | 123,916 | 60,963 | 187,831 | 115,729 | 120,312 | 56,162 | 1,426,236 |
| 620622003 | RCDW-20 | 2008 | SalesHistory | 109,000 | 128,400 | 116,400 | 58,800 | 224,400 | 0 | 64,800 | 0 | 231,600 | 240,000 | -7,200 | 213,600 | 1,378,800 |
| 620525001 | RCDW-20 | 2008 | Forecast | 212,146 | 233,295 | 247,475 | 260,014 | 266,060 | 271,816 | 279,505 | 275,846 | 276,614 | 271,945 | 275,772 | 279,269 | 3,149,351 |
| 620525001 | RCDW-20 | 2008 | SalesHistory | 447,600 | 240,000 | 216,000 | 96,000 | 144,000 | 240,000 | 0 | 192,000 | 96,000 | 336,000 | 312,000 | 312,000 | 2,631,600 |
| 620471001 | RCDK-20 | 2008 | Forecast | 345,467 | 430,801 | 653,408 | 363,651 | 455,945 | 296,384 | 370,209 | 558,703 | 806,453 | 889,698 | 1,158,762 | 526,202 | 6,855,678 |
| 620471001 | RCDK-20 | 2008 | SalesHistory | 571,200 | 429,600 | 640,800 | 278,400 | 549,600 | 324,000 | 355,200 | 385,200 | 717,600 | 1,064,400 | 884,400 | 524,400 | 6,724,800 |
| 620409001 | RCDK-20 | 2008 | Forecast | 125,413 | 126,916 | 127,467 | 129,590 | 155,745 | 155,415 | 207,382 | 227,065 | 207,000 | 237,519 | 276,720 | 272,010 | 2,248,236 |
| 620409001 | RCDK-20 | 2008 | SalesHistory | 48,000 | 58,800 | 80,400 | 219,600 | 87,600 | 379,200 | 217,200 | 22,800 | 310,800 | 368,400 | 148,800 | 238,800 | 2,180,400 |
| 620366012 | RCDK-20 | 2008 | Forecast | 541,517 | 172,428 | 390,133 | 301,270 | 610,997 | 168,705 | 603,501 | 206,340 | 486,168 | 573,344 | 531,567 | 460,555 | 5,046,521 |
| 620366012 | RCDK-20 | 2008 | SalesHistory | 582,000 | 193,200 | 396,000 | 454,800 | 351,200 | 337,200 | 512,400 | 310,800 | 498,000 | 770,400 | 372,000 | 432,000 | 5,220,000 |
| | | | Total Forecast | 2,838,556 | 2,832,676 | 2,886,821 | 2,475,688 | 3,138,589 | 2,436,887 | 2,885,949 | 3,813,861 | 3,626,637 | 4,096,040 | 4,846,367 | 3,125,449 | 38,387,297 |
| | | | Total SalesHistory | 3,309,200 | 2,936,800 | 2,986,600 | 2,379,400 | 2,822,500 | 2,638,800 | 2,561,600 | 2,478,800 | 3,477,600 | 4,878,800 | 4,897,200 | 3,462,300 | 37,960,200 |

Summary View

Planning Portal 4

Getting Started | Filtering | Reports | Mass Adjust | Data Browser

Data View Settings

Data Browser

Series Per Page: 10 | Go To Page: 1 | 256 items found

| Field | Value |
|-------|---------------------|
| Part | 648477008 |
| Desc1 | RT-48 GREAT STEAK & |

| Year | Opinion | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
|------|--------------|---------|---------|---------|---------|---------|---------|---------|---------|--------|---------|---------|---------|-----------|
| 2008 | Forecast | 114,945 | 137,264 | 129,193 | 151,762 | 109,741 | 127,246 | 133,037 | 155,223 | 93,770 | 133,018 | 137,052 | 150,275 | 1,572,522 |
| 2008 | SalesHistory | 80,000 | 70,000 | 155,000 | 175,000 | 2,500 | 166,000 | 160,000 | 122,000 | 75,000 | 90,000 | 244,000 | 139,500 | 1,479,000 |

| Field | Value |
|-------|-----------------------|
| Part | 620798005 |
| Desc1 | RCDK-20 SOHO RECYCLED |

| Year | Opinion | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
|------|--------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| 2008 | Forecast | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 238,800 | 2,865,600 |
| 2008 | SalesHistory | 481,200 | 240,000 | 190,800 | 253,200 | 189,600 | 75,600 | 193,200 | 94,800 | 228,800 | 201,600 | 231,600 | 238,800 | 2,617,200 |

Classic View

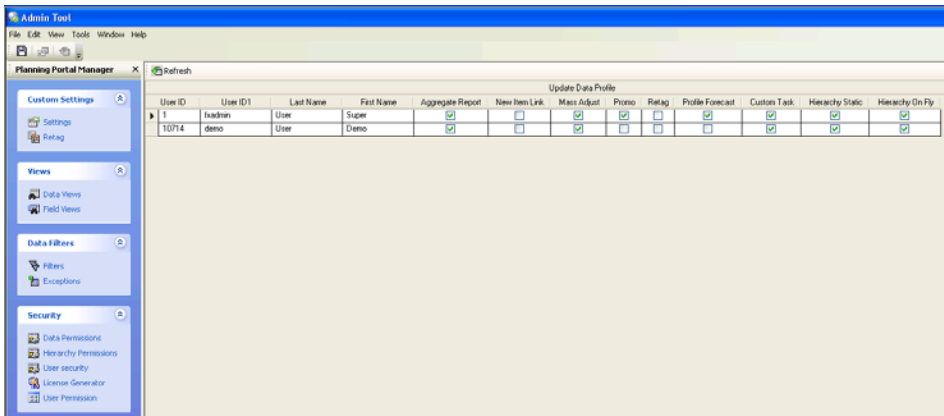
4-5: Hierarchy Management

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

4-5-1: User Permissions

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

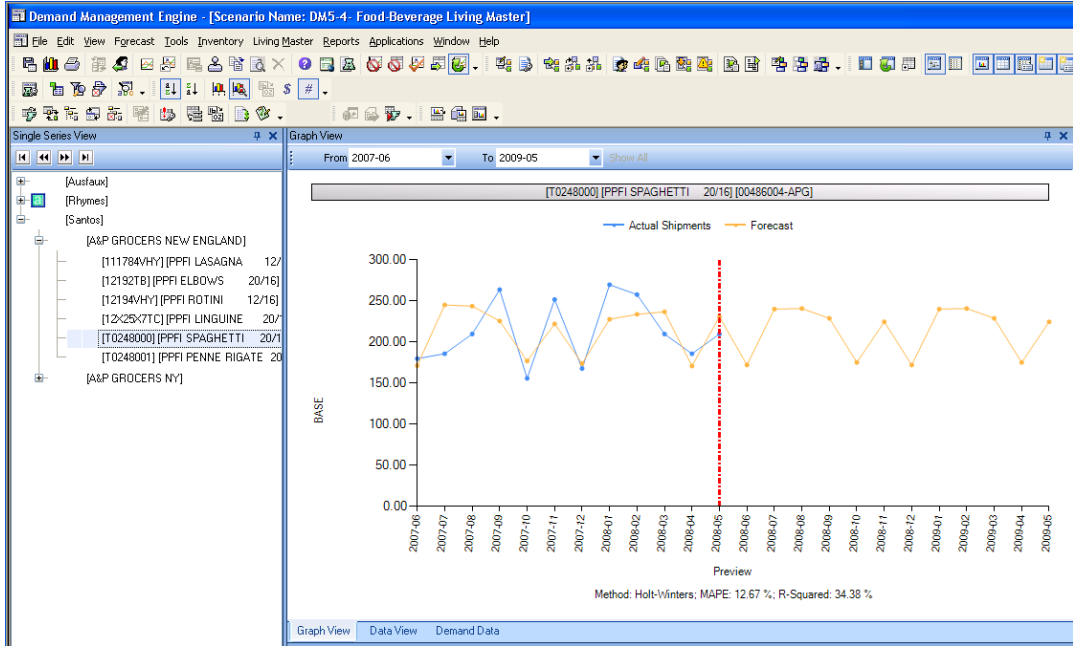
To assign hierarchy permissions, log into the Admin Tool, select user permissions from the menu on the right and select whether On Fly and/or Static hierarchy usage is allowed for the User ID.



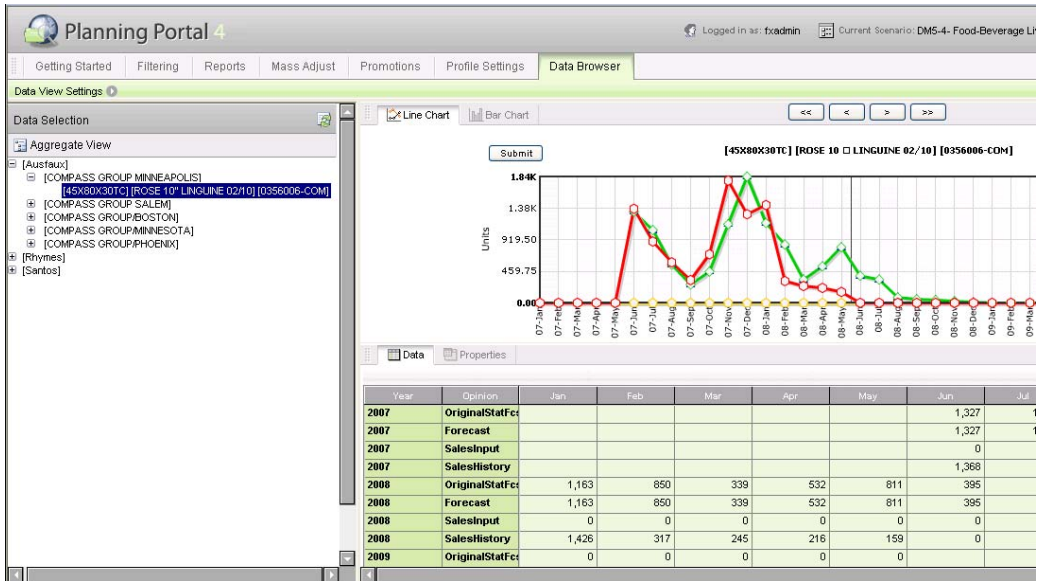
User Permissions

4-5-2: Static Hierarchies

Static hierarchies available within the Planning Portal are those currently applied to the related Living Master in the Demand Management Engine.



Hierarchy Applied in Living Master



To view the existing Living Master hierarchy, select the Level tab within Data View Settings from the pull down, choose Static, select the required Hierarchy from the Hierarchy pull down and choose your appropriate filter or exception.

Planning Portal 4 Start Page

The Planning Portal provides "real time" collaboration to identify areas of the business that need forecast adjustments and allows for fast integration into the live demand plan. 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.



Data View Settings

| | | | | | | |
|------------|---------------------|------------|----------------------|----------|----------|-------|
| View Type | View By | Visibility | Date Range | Calendar | Order By | Level |
| Tree Level | DMS-4- Food-Beverag | Hierarchy | Customer x Sales Rep | Static | | |

Show hierarchical view

The hierarchy applied is visible at the top right in the header of the Planning Portal display.

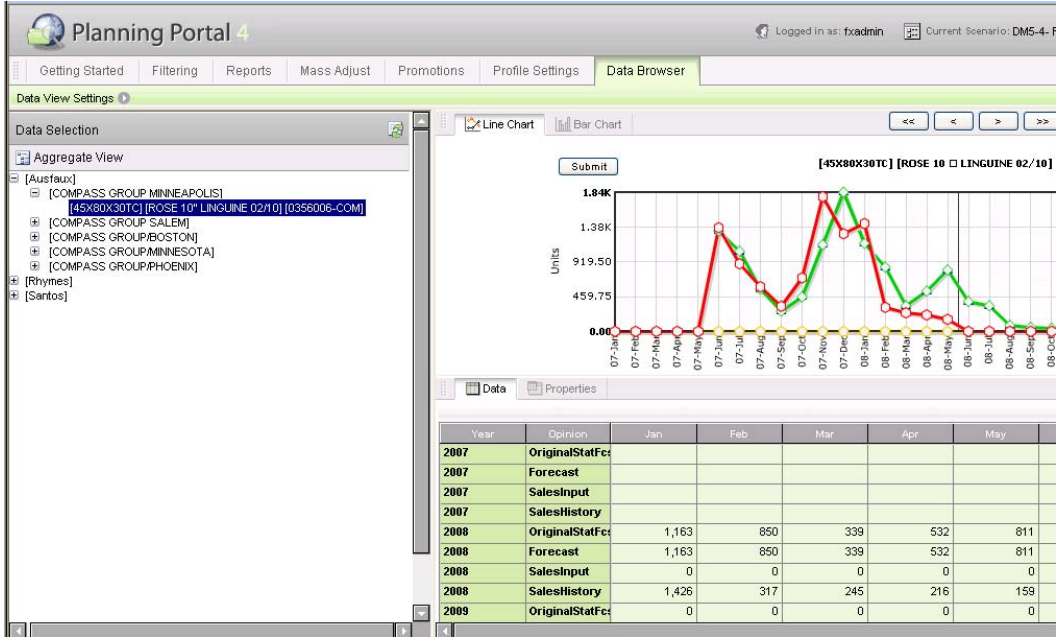
Logged in as: fxadmin Current Scenario: DMS-4- Food-Beverage Living Master Static: Customer x Sales Rep Logout

the business that need forecast adjustments and part of the planning process is getting feedback from ng information and managing exceptions is the key to velop a demand driven supply chain.

News Feed

- FDA**
- [FDA Taking Steps to Improve Contact Lens Safety](#)
- [FDA Advises Consumers Not To Use Certain Zicam Cold Remedies](#)
- [FDA Alerts Patients to Medtronic Pacemaker Recall](#)
- [FDA Warns Web Sites against Marketing Fraudulent H1N1 Flu Virus Claims](#)
- [FDA Requests Labeling Change for Leukotriene Modifiers](#)
- [FDA Issues Public Health Advisory Regarding Levemir Insulin](#)

When the filter or exception has been run, the hierarchy is visible within your Detail View.



Detail View

If the Living Master has no Static hierarchy applied then the option available to users will be:

- No hierarchy: This will load the scenario without any hierarchy.
- On Fly: Selecting this option will load the 'Hierarchy' drop down list with all the available hierarchies for the currently logged in user. Then you will be able to select the desired hierarchy and level from the tree.

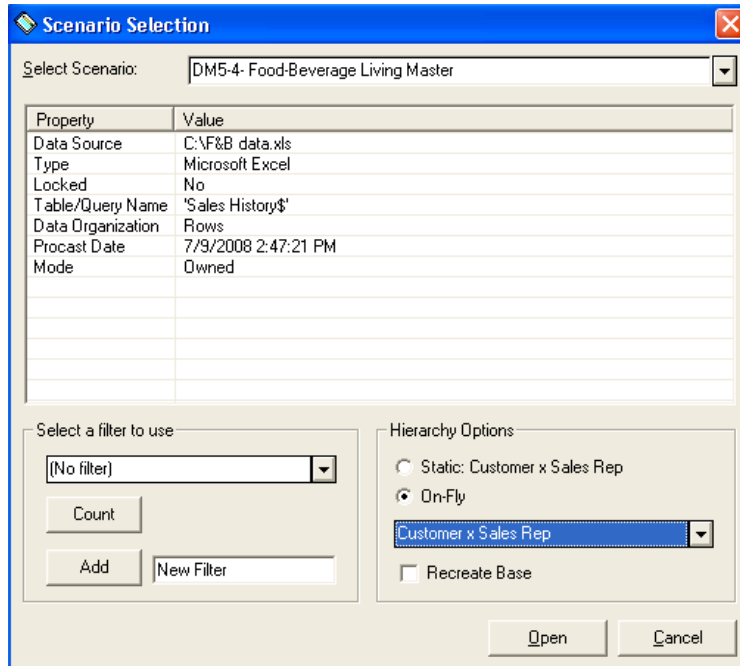
4-5-3: On Fly Hierarchies

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

4-5-3-1: Assigning On Fly Hierarchy Permissions

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

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

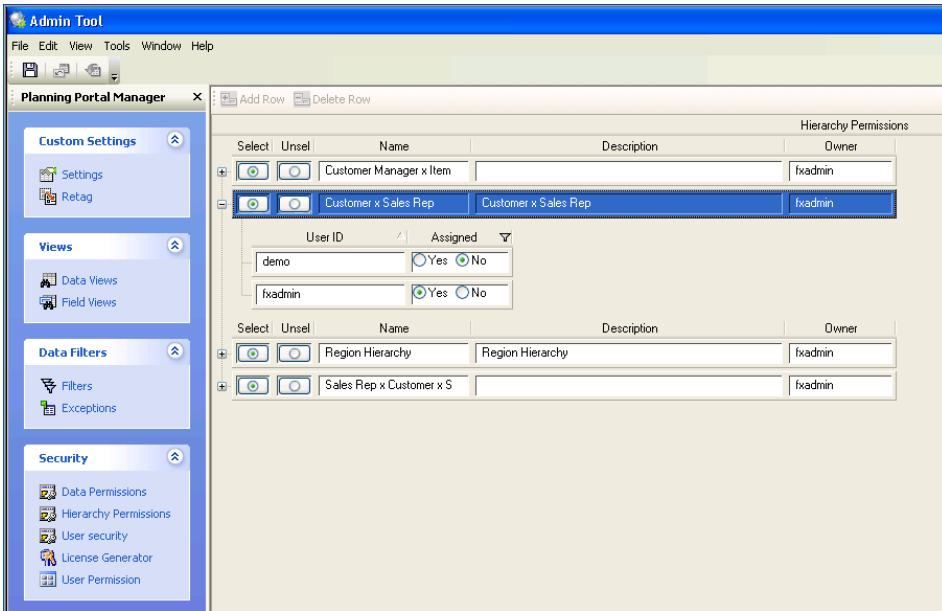


Choosing On Fly Hierarchy at Log In

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

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

Must have the “Hierarchy On Fly” option enabled



Hierarchy Permissions

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

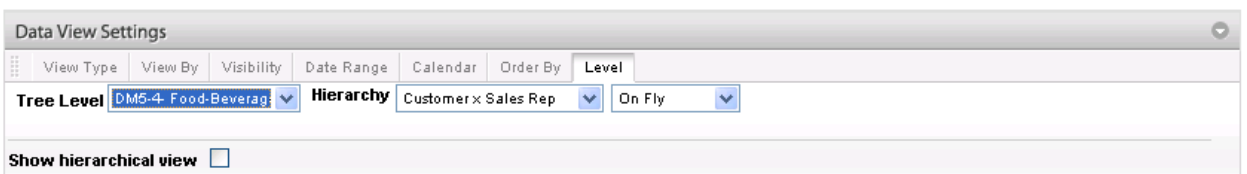
4-5-3-2: Using On Fly Hierarchy

Once the required permissions have been obtained, the On Fly option is visible within the Data View Settings area when you re-log into the system. Now when the Level tab is chosen, you'll be offered the option of displaying views with:

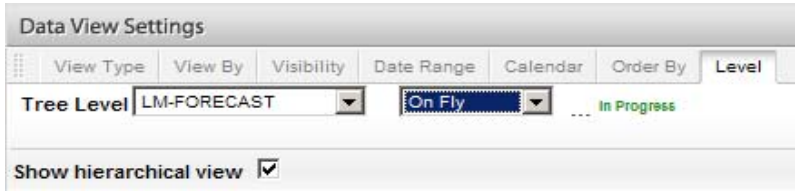
- No Hierarchy
- Static Hierarchy
- On Fly Hierarchy

Planning Portal 4 Start Page

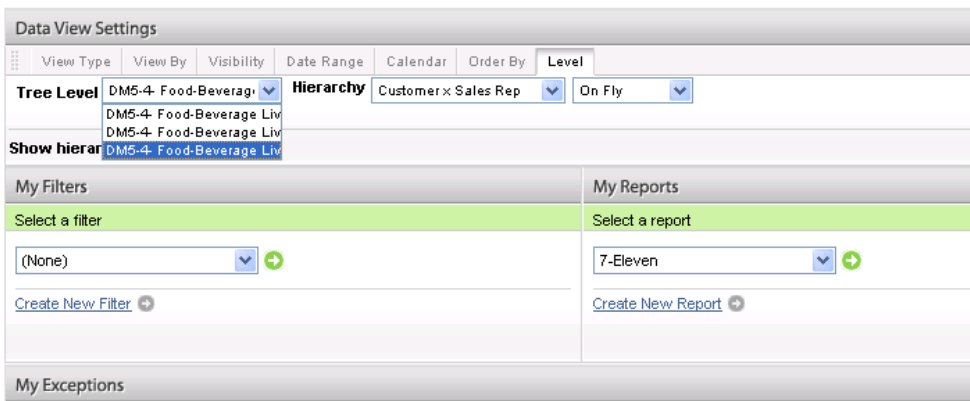
The Planning Portal provides "real time" collaboration to identify areas of the business that need forecast adjustments and allows for fast integration into the live demand plan. The most important part of the planning process is getting feedback from external participants to develop a better understanding 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.



When changing to the On Fly hierarchy, you will notice “In progress ...” displayed briefly to the right of the On Fly selection box. This creates the hierarchy for your data.

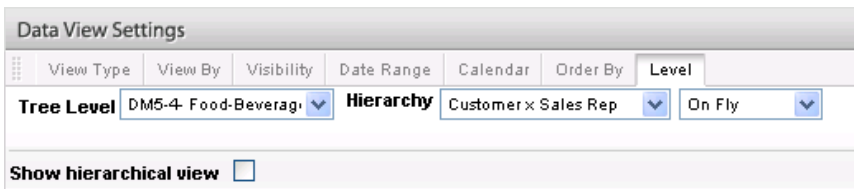


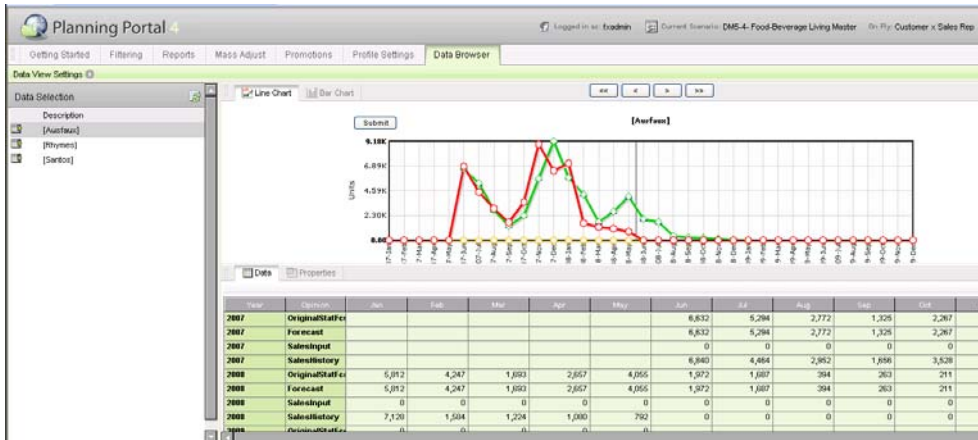
One further task must be completed to view hierarchical data in the required views. In the Tree Level, you will now be able to see the different aggregation levels of your data. Generally, the lowest levels of aggregation appear at the bottom of the pull down and highest levels at the top.



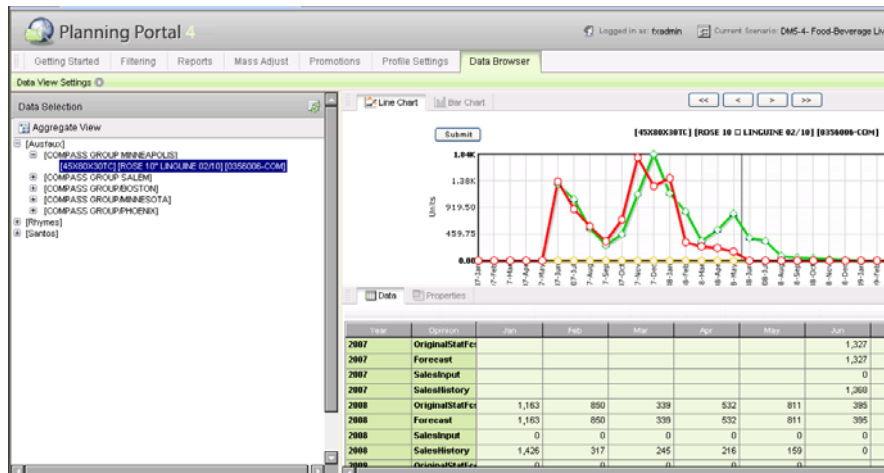
Tree Level Display

If the “Show hierarchical view” is not selected, only the selected level is displayed in the Detail View. Drill downs or ups are not allowed.





Show Hierarchical View Not Selected



Show Hierarchical View Selected

4-6: Custom Tasks

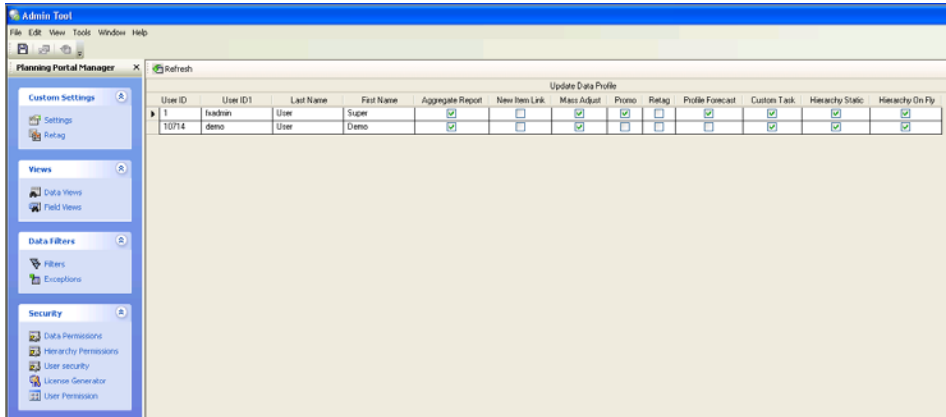
Custom tasks automate standardized processes, can perform customized calculations, and generate new data series. Traditionally, this capability had only existed in the Demand Management Engine. Custom Task can now be handled within the Planning Portal. Users have the ability to:

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

4-6-1: User Permissions

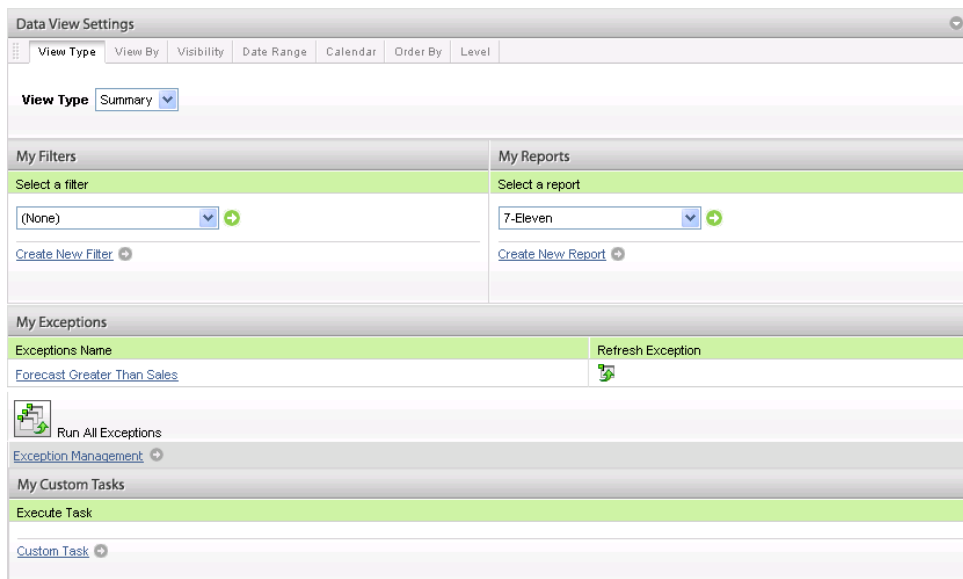
All users who wish to utilize custom tasks within the Planning Portal, MUST have been granted the appropriate User Permissions within their User Profile in the Planning Portal Admin Tool. In most cases, this will only be updated by the Demand Management System Administrator.

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

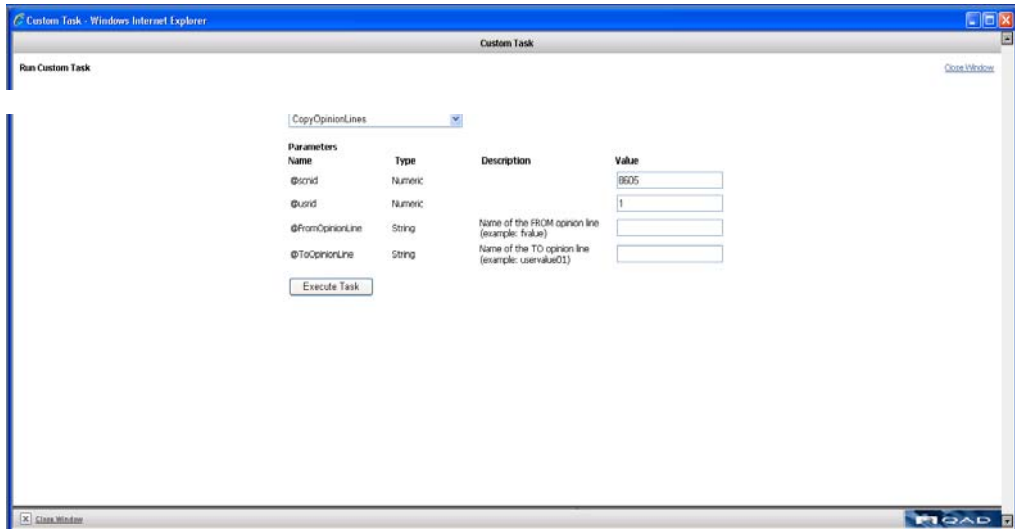


4-6-2: Using Custom Tasks

Upon receiving required approvals, the authorized user will now find a custom task link in the central section of the Planning Portal Start Page.



Select the Custom Task link. Available tasks are displayed for use. Tasks available will vary by implementation. Make required choices and execute the Task.



Section 5: Filtering

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

The screenshot displays the Planning Portal 4 interface. At the top, there is a navigation bar with tabs: Getting Started, Filtering, Reports, Mass Adjust, Promotions, Profile Settings, and Data Browser. The main content area is divided into several sections:

- Quick Start Guide:** A section with a "Planning Portal feature overview:" and a list of features: Filtering, Data Browser, Reports, Mass Adjust, Promotions, and Profile Settings, each with a right-pointing arrow.
- June 2009 Calendar:** A calendar grid for June 2009. The date 17 is circled in red.
- Planning Portal 4 Start Page:** A large heading with a description: "The Planning Portal provides 'real time' collaboration to identify areas of... allows for fast integration into the live demand plan. The most important p... external participants to develop a better understanding of demand. Sharin... developing a productive relationship with customers and suppliers to deve..."
- Data View Settings:** A section with a sub-navigation bar: View Type, View By, Visibility, Date Range, Calendar, Order By, and Level. Below this, the "View Type" is set to "Detail".
- My Filters:** A section titled "Select a filter" with a dropdown menu showing "Ausfaux" and a green plus icon. Below this is a link "Create New Filter" with a plus icon.

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.

5-1: 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.

5-1-1: View Filters

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

The Data Browser window displays with the series.

The screenshot shows the 'Data Browser' window in the Planning Portal 4. The window title is 'Data Browser' and it shows 5 items found. The 'View By' is set to 'Units'. The table displays data for the years 2007, 2008, and 2009, with columns for each month (Jan-Dec) and a 'Total' column. The data is categorized by 'Opinion' (OriginalStatF, Forecast, SalesInput, SalesHistory).

| Year | Opinion | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
|------|---------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| 2007 | OriginalStatF | | | | | | 531 | 424 | 222 | 106 | 182 | 458 | 735 | 2,656 |
| 2007 | Forecast | | | | | | 531 | 424 | 222 | 106 | 182 | 458 | 735 | 2,656 |
| 2007 | SalesInput | | | | | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2007 | SalesHistory | | | | | | 548 | 358 | 237 | 133 | 283 | 713 | 516 | 2,784 |
| 2008 | OriginalStatF | 465 | 340 | 136 | 213 | 325 | 158 | 135 | 32 | 22 | 17 | 11 | 4 | 1,853 |
| 2008 | Forecast | 465 | 340 | 136 | 213 | 325 | 158 | 135 | 32 | 22 | 17 | 11 | 4 | 1,853 |
| 2008 | SalesInput | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2008 | SalesHistory | 571 | 127 | 98 | 87 | 64 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 945 |
| 2009 | OriginalStatF | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2009 | Forecast | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2009 | SalesInput | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2009 | SalesHistory | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

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.

5-1-2: Create Filters

To create a new filter:

1. Click on the Create button.

The Filter Management area expands.

The screenshot shows a web interface titled "Filter Management". At the top, there is a green banner with the text "Select a filter to edit or create a new filter". Below this, there is a "Filters" dropdown menu currently showing "Ausfaux". To the right of the dropdown are four buttons: "View", "Create", "Edit", and "Delete". The "Create" button is highlighted. Below the buttons, the form is expanded to show the details for the selected filter. The "Filter Name" field contains "Ausfaux". The "Description" field contains "Ausfaux" and has two small downward arrows on its right side. The "Definition" section contains five fields: "PrimarySalesRep" (with a dropdown menu showing "Ausfaux;"), "Customer", "Part", "Site", and "Territory", each with a dropdown arrow on its right side. 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.

5-1-3: 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 interface titled "Filter Management". At the top, there is a green banner with the text "Select a filter to edit or create a new filter". Below this, there is a "Filters" dropdown menu currently showing "Ausfaux". To the right of the dropdown are four buttons: "View", "Create", "Edit", and "Delete". The "Edit" button is highlighted. Below the buttons, the form is divided into sections: "Filter Name" with a text box containing "Ausfaux"; "Description" with a text box containing "Ausfaux" and a small downward arrow; and "Definition" which contains a list of fields: "PrimarySalesRep" (dropdown with "Ausfaux;" selected), "Customer" (dropdown), "Part" (dropdown), "Site" (dropdown), and "Territory" (dropdown). 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.

5-1-4: Delete Filters

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

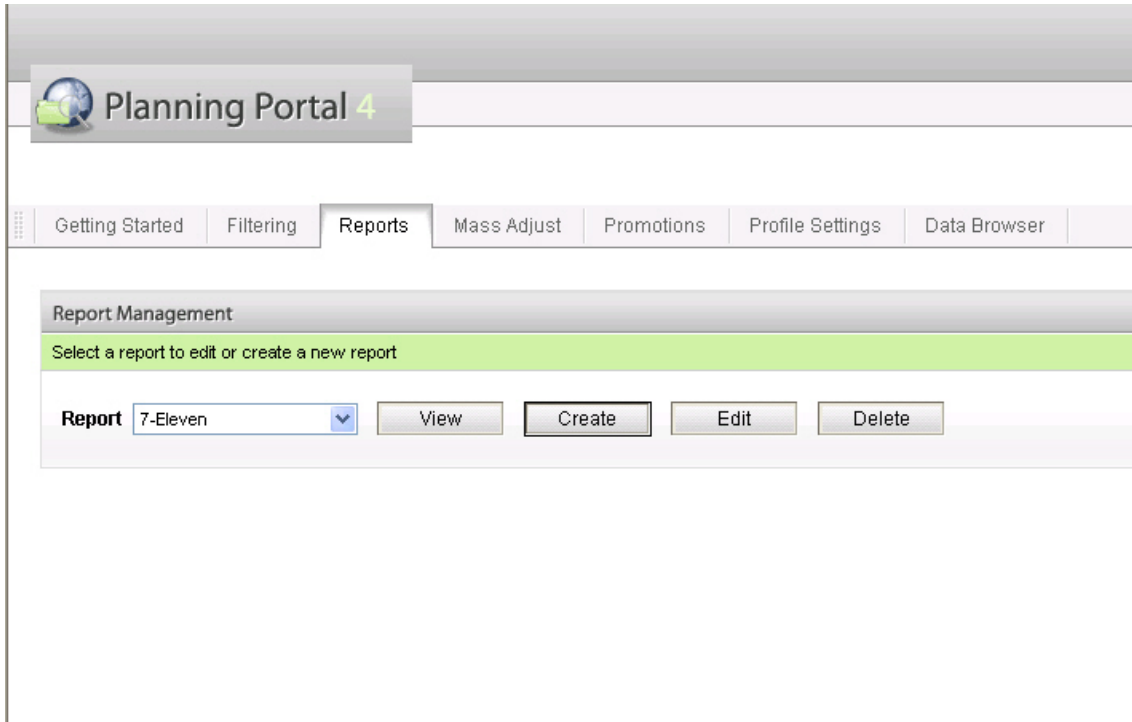
2. Click OK to delete the filter or Cancel.



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..

| Part | Customer | Opinion | Year | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
|-----------|-------------|--------------|------|----------|----------|----------|----------|----------|----------|----------|----------|----------|--------|----------|--------|-----------|
| 111784VHY | A&P GROCERS | Forecast | 2008 | 168.00 | 152.00 | 196.00 | 117.00 | 169.00 | 119.00 | 181.00 | 160.00 | 191.00 | 120.00 | 163.00 | 119.00 | 1,855.00 |
| 111784VHY | A&P GROCERS | SalesHistory | 2008 | 210.00 | 180.00 | 180.00 | 126.00 | 150.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 846.00 |
| 12192TB | A&P GROCERS | Forecast | 2008 | 104.00 | 81.00 | 67.00 | 70.00 | 106.00 | 86.00 | 86.00 | 69.00 | 103.00 | 86.00 | 88.00 | 69.00 | 1,037.00 |
| 12192TB | A&P GROCERS | SalesHistory | 2008 | 114.00 | 102.00 | 90.00 | 66.00 | 90.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 462.00 |
| 12194VHY | A&P GROCERS | Forecast | 2008 | 113.00 | 133.00 | 96.00 | 79.00 | 53.00 | 40.00 | 40.00 | 40.00 | 40.00 | 40.00 | 40.00 | 40.00 | 754.00 |
| 12194VHY | A&P GROCERS | SalesHistory | 2008 | 143.00 | 77.00 | 71.00 | 39.00 | 34.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 364.00 |
| 12X25X7TC | A&P GROCERS | Forecast | 2008 | 68.00 | 75.00 | 52.00 | 39.00 | 25.00 | 22.00 | 22.00 | 22.00 | 22.00 | 22.00 | 22.00 | 22.00 | 413.00 |
| 12X25X7TC | A&P GROCERS | SalesHistory | 2008 | 78.00 | 44.00 | 36.00 | 21.00 | 21.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 200.00 |
| 15182VB-H | A&P GROCERS | Forecast | 2008 | 99.00 | 99.00 | 99.00 | 100.00 | 100.00 | 99.00 | 99.00 | 99.00 | 99.00 | 99.00 | 99.00 | 99.00 | 1,190.00 |
| 15182VB-H | A&P GROCERS | SalesHistory | 2008 | 111.00 | 117.00 | 113.00 | 113.00 | 51.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 505.00 |
| 15191VB | A&P GROCERS | Forecast | 2008 | 75.00 | 76.00 | 116.00 | 66.00 | 62.00 | 66.00 | 79.00 | 77.00 | 110.00 | 69.00 | 55.00 | 66.00 | 917.00 |
| 15191VB | A&P GROCERS | SalesHistory | 2008 | 86.00 | 81.00 | 97.00 | 77.00 | 37.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 378.00 |
| 15192TB | A&P GROCERS | Forecast | 2008 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 504.00 |
| 15192TB | A&P GROCERS | SalesHistory | 2008 | 47.00 | 46.00 | 49.00 | 41.00 | 22.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 205.00 |
| 15233VHY | A&P GROCERS | Forecast | 2008 | 158.00 | 162.00 | 158.00 | 160.00 | 156.00 | 139.00 | 134.00 | 130.00 | 126.00 | 122.00 | 118.00 | 113.00 | 1,676.00 |
| 15233VHY | A&P GROCERS | SalesHistory | 2008 | 196.00 | 160.00 | 189.00 | 155.00 | 84.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 784.00 |
| 15234VB | A&P GROCERS | Forecast | 2008 | 136.00 | 110.00 | 165.00 | 103.00 | 102.00 | 108.00 | 141.00 | 111.00 | 164.00 | 104.00 | 90.00 | 108.00 | 1,442.00 |
| 15234VB | A&P GROCERS | SalesHistory | 2008 | 153.00 | 111.00 | 162.00 | 105.00 | 60.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 591.00 |
| 15235TB | A&P GROCERS | Forecast | 2008 | 65.00 | 66.00 | 65.00 | 67.00 | 64.00 | 58.00 | 57.00 | 56.00 | 55.00 | 53.00 | 52.00 | 51.00 | 709.00 |
| 15235TB | A&P GROCERS | SalesHistory | 2008 | 83.00 | 63.00 | 81.00 | 55.00 | 36.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 318.00 |
| T0248000 | A&P GROCERS | Forecast | 2008 | 228.00 | 234.00 | 238.00 | 171.00 | 232.00 | 173.00 | 241.00 | 242.00 | 230.00 | 176.00 | 225.00 | 173.00 | 2,563.00 |
| T0248000 | A&P GROCERS | SalesHistory | 2008 | 270.00 | 258.00 | 210.00 | 186.00 | 210.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1,134.00 |
| T0248001 | A&P GROCERS | Forecast | 2008 | 165.00 | 182.00 | 116.00 | 85.00 | 59.00 | 49.00 | 49.00 | 49.00 | 49.00 | 49.00 | 49.00 | 49.00 | 950.00 |
| T0248001 | A&P GROCERS | SalesHistory | 2008 | 184.00 | 111.00 | 82.00 | 57.00 | 48.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 482.00 |
| Total | | Forecast | 2008 | 1,421.00 | 1,412.00 | 1,430.00 | 1,099.00 | 1,170.00 | 1,091.00 | 1,173.00 | 1,097.00 | 1,231.00 | 982.00 | 1,043.00 | 951.00 | 14,010.00 |
| Total | | SalesHistory | 2008 | 1,675.00 | 1,350.00 | 1,360.00 | 1,041.00 | 843.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6,269.00 |

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.

Report Management

Select a report to edit or create a new report

Report 7-Eleven

Report Name

Customer

- All Available
- A&P GROCERS NEW ENGLAND
- A&P GROCERS NY
- ALBERTSONS INDIANAPOLIS
- ALBERTSONS/CINCINNATI
- ALBERTSONS/MID-ATLANTIC
- COMPASS GROUP MINNEAPOLIS
- COMPASS GROUP SALEM

Part

- All Available
- 02051VC
- 031061SC
- 031072VTBY
- 033063SC
- 033072VTBY
- 03817-354 N70R
- 03837-354 N70R

Site

- All Available

PrimarySalesRep

- All Available
- Ausfaux
- Rhymes
- Santos

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.

The Report Management area expands.

3.6

The screenshot displays a web-based interface for report management. It is divided into two main sections: 'Report Level' and 'Opinions'.
Report Level: This section contains five rows, each with a checkbox and a dropdown menu. The rows are: Part (checkbox), Site (checkbox), Customer (checkbox), PrimarySalesRep (checkbox), and Territory (checkbox). The dropdown menus are currently set to values 1, 2, 3, 4, and 5 respectively.
Opinions: This section contains three checked checkboxes: Forecast, SalesHistory, and OriginalStatFcst. Below these is a 'Calendar Jump' section with a dropdown menu currently set to 0.
A 'Save' button is located at the bottom right of the interface.

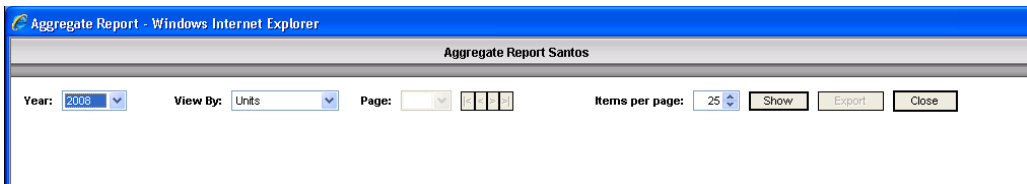
2. Make your edits as necessary.
3. Click Save when finished.

6-4: Aggregate Report – Paging & Reporting Changes

Aggregate Reporting has been enhanced to support paging as exists in the Summary view.

Users can:

- Define the items per page that will be loaded.
- Select the specific page that will be displayed.



Determine Items Per Page in Report Creation

Aggregate reporting improvements also include the following changes in the result display.

- Colorized separation by key grouping in report creation.
- Totals by opinion line at the end of the report.

| Part | Customer | Opinion | Year | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Tot |
|-----------|-----------------|--------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|--------|----------|--------|-----------|----------|
| 111784VHY | ASP-GROCERS NEW | Forecast | 2008 | 169.00 | 152.00 | 196.00 | 117.00 | 169.00 | 119.00 | 191.00 | 160.00 | 191.00 | 120.00 | 163.00 | 119.00 | 1,855.00 |
| 111784VHY | ASP-GROCERS NEW | SalesHistory | 2008 | 210.00 | 180.00 | 180.00 | 126.00 | 150.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 846.00 |
| 12192TB | ASP-GROCERS NEW | Forecast | 2008 | 104.00 | 81.00 | 87.00 | 70.00 | 106.00 | 86.00 | 88.00 | 89.00 | 103.00 | 86.00 | 88.00 | 89.00 | 1,037.00 |
| 12192TB | ASP-GROCERS NEW | SalesHistory | 2008 | 114.00 | 102.00 | 90.00 | 66.00 | 90.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 462.00 |
| 12194VHY | ASP-GROCERS NEW | Forecast | 2008 | 113.00 | 133.00 | 96.00 | 78.00 | 53.00 | 40.00 | 40.00 | 40.00 | 40.00 | 40.00 | 40.00 | 40.00 | 754.00 |
| 12194VHY | ASP-GROCERS NEW | SalesHistory | 2008 | 143.00 | 77.00 | 71.00 | 39.00 | 34.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 364.00 |
| 12K25K7C | ASP-GROCERS NEW | Forecast | 2008 | 68.00 | 75.00 | 52.00 | 39.00 | 25.00 | 22.00 | 22.00 | 22.00 | 22.00 | 22.00 | 22.00 | 22.00 | 413.00 |
| 12K25K7C | ASP-GROCERS NEW | SalesHistory | 2008 | 70.00 | 44.00 | 36.00 | 21.00 | 21.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 200.00 |
| 15182VB-H | ASP-GROCERS NY | Forecast | 2008 | 99.00 | 99.00 | 99.00 | 100.00 | 100.00 | 99.00 | 99.00 | 99.00 | 99.00 | 99.00 | 99.00 | 99.00 | 1,180.00 |
| 15182VB-H | ASP-GROCERS NY | SalesHistory | 2008 | 111.00 | 117.00 | 113.00 | 113.00 | 51.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 505.00 |
| 15191VB | ASP-GROCERS NY | Forecast | 2008 | 75.00 | 76.00 | 116.00 | 66.00 | 62.00 | 66.00 | 79.00 | 77.00 | 110.00 | 89.00 | 55.00 | 66.00 | 917.00 |
| 15191VB | ASP-GROCERS NY | SalesHistory | 2008 | 98.00 | 91.00 | 97.00 | 77.00 | 37.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 379.00 |
| 15192TB | ASP-GROCERS NY | Forecast | 2008 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 42.00 | 504.00 |
| 15192TB | ASP-GROCERS NY | SalesHistory | 2008 | 47.00 | 48.00 | 49.00 | 41.00 | 22.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 205.00 |
| 15233VHY | ASP-GROCERS NY | Forecast | 2008 | 150.00 | 162.00 | 156.00 | 160.00 | 156.00 | 139.00 | 134.00 | 130.00 | 126.00 | 122.00 | 110.00 | 113.00 | 1,676.00 |
| 15233VHY | ASP-GROCERS NY | SalesHistory | 2008 | 186.00 | 180.00 | 188.00 | 188.00 | 84.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 784.00 |
| 15234VB | ASP-GROCERS NY | Forecast | 2008 | 136.00 | 110.00 | 165.00 | 103.00 | 102.00 | 100.00 | 141.00 | 111.00 | 164.00 | 104.00 | 90.00 | 100.00 | 1,442.00 |
| 15234VB | ASP-GROCERS NY | SalesHistory | 2008 | 153.00 | 111.00 | 162.00 | 105.00 | 60.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 591.00 |
| 15235TB | ASP-GROCERS NY | Forecast | 2008 | 65.00 | 66.00 | 65.00 | 67.00 | 64.00 | 58.00 | 57.00 | 56.00 | 55.00 | 53.00 | 52.00 | 51.00 | 709.00 |
| 15235TB | ASP-GROCERS NY | SalesHistory | 2008 | 83.00 | 63.00 | 81.00 | 55.00 | 36.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 318.00 |
| T0240000 | ASP-GROCERS NEW | Forecast | 2008 | 229.00 | 234.00 | 238.00 | 171.00 | 232.00 | 173.00 | 241.00 | 242.00 | 220.00 | 176.00 | 225.00 | 173.00 | 2,562.00 |
| T0240000 | ASP-GROCERS NEW | SalesHistory | 2008 | 270.00 | 258.00 | 210.00 | 186.00 | 210.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1,134.00 |
| T0248001 | ASP-GROCERS NEW | Forecast | 2008 | 165.00 | 182.00 | 116.00 | 85.00 | 89.00 | 49.00 | 49.00 | 49.00 | 49.00 | 49.00 | 49.00 | 49.00 | 950.00 |
| T0248001 | ASP-GROCERS NEW | SalesHistory | 2008 | 184.00 | 111.00 | 82.00 | 57.00 | 48.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 482.00 |
| Total | Forecast | 2008 | 1,421.00 | 1,412.00 | 1,430.00 | 1,099.00 | 1,170.00 | 1,001.00 | 1,173.00 | 1,097.00 | 1,231.00 | 982.00 | 1,043.00 | 951.00 | 14,010.00 | |
| Total | SalesHistory | 2008 | 1,875.00 | 1,380.00 | 1,360.00 | 1,041.00 | 843.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6,289.00 | |

Items Per Page, Page Selection & Display Changes

Section 7: Mass Adjust

The Mass Adjust page consists of three different features:

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

Planning Portal 4

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

Mass Adjustment Management

Select Multiple Series Items from the Field Views to perform Mass Adjustments

Customer

- All Available
- A&P GROCERS NEW ENGLAND
- A&P GROCERS NY
- ALBERTSONS INDIANAPOLIS
- ALBERTSONS/CINCINNATI
- ALBERTSONS/MID-ATLANTIC
- COMPASS GROUP MINNEAPOLIS
- COMPASS GROUP SALEM

Part

- All Available
- 02051YC
- 031061SC
- 031072VTBY
- 033063SC
- 033072VTBY
- 03817-354 N70R
- 03837-354 N70R

Site

- All Available

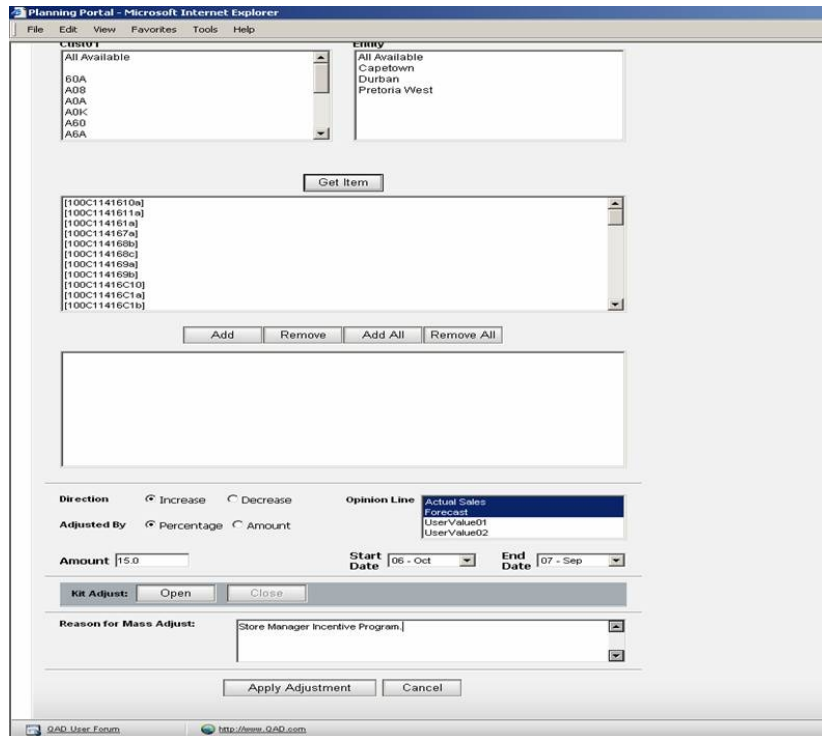
PrimarySalesRep

- All Available
- Ausfaux
- Rhymes
- Santos

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.



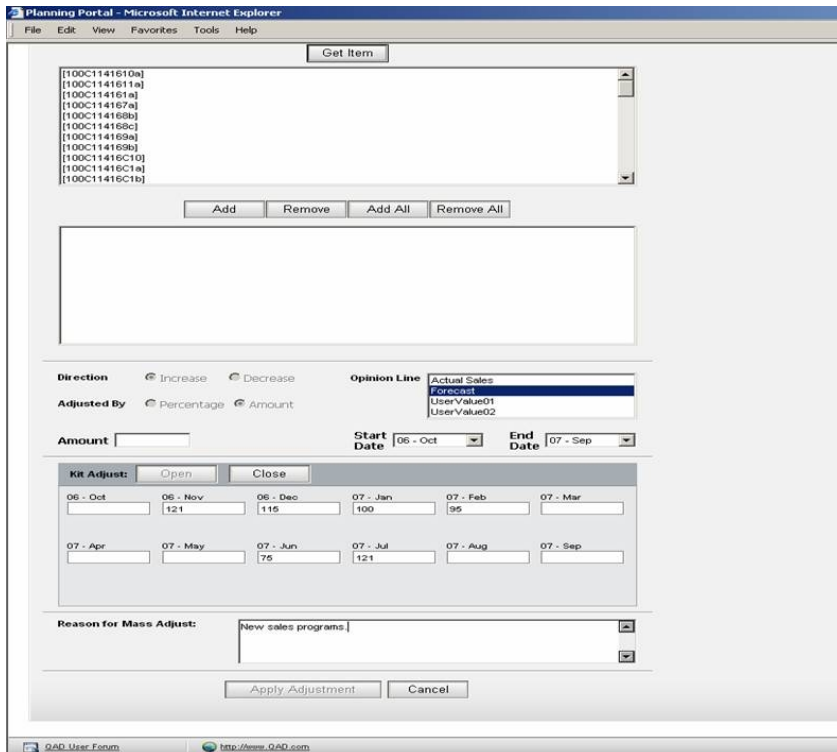
Select the series listed and move them below by clicking on the Add, or Add All buttons. The series you are adding are the series that will be part of your Mass Adjustment.

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 8: Promotions

8-1: 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.

Promotions Management

To create or edit an Ad, select a customer first

Ads: A&P GROCERS NEW ENGLAND - A&P GROCERS NE

Ad Assumption Builder

Properties Items

| General Properties | Administrative |
|---|--|
| <p>Customer Name: A&P GROCERS NEW ENGLAND</p> <p>Mkt Code: A&P GROCERS NEW ENGLAND</p> <p>*First Effective Date: 6/3/2007</p> <p>*Last Effective Date: 6/10/2007</p> <p># of weeks from production to delivery: 1</p> <p>Ad Type: 10% Off</p> <p>Percent Ad Lift: 10</p> <p>Facility: A&P GROCERS NEW ENGLAND</p> <p>Completed By: Super User</p> | <p>Ad Number: 33226</p> <p>Date: 6/17/2009 12:55:15 PM</p> <p>Total Ad Projection</p> <p>Base Line Cases: 0</p> <p>Incremental Cases: 0</p> <p>Total Cases: 0</p> |

The Ad was properly saved.

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.

The screenshot shows the 'Promotions Management' interface. At the top, there is a header 'Promotions Management' and a green bar with the text 'To create or edit an Ad, select a customer first'. Below this, there is an 'Ads' dropdown menu showing 'A&P GROCERS NEW ENGLAND - A&P GROCERS NE' and two buttons: 'View' and 'New'. The main section is titled 'Ad Assumption Builder' and has two tabs: 'Properties' and 'Items', with 'Items' being the active tab. Under the 'Items' tab, there is an 'Item filtering' section. This section contains five dropdown menus: 'Customer' (set to 'A&P GROCERS NEW ENGLAND'), 'Site', 'Territory', 'Part', and 'PrimarySalesRep' (set to 'Santos'). At the bottom of the filtering section, there are two buttons: 'Available Items in the Scenario' and 'Display Items of the Ad'.

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

The Available Items are displayed.

Promotions Management

To create or edit an Ad, select a customer first

Ads **A&P GROCERS NEW ENGLAND - A&P GROCERS NE**

Ad Assumption Builder

Properties **Items**

Item filtering

Customer: Part:

Site: PrimarySalesRep:

Territory:

Available Items

| Part | ProductFamily | ProductType | Set Promo |
|-----------|---------------|-------------|--------------------------|
| 111784VHY | CARB | | <input type="checkbox"/> |
| 12192TB | CARB | | <input type="checkbox"/> |
| 12194VHY | CARB | | <input type="checkbox"/> |
| 12X25X7TC | CARB | | <input type="checkbox"/> |
| T0248000 | CARB | | <input type="checkbox"/> |

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.

Promotions Management

To create or edit an Ad, select a customer first

Ads **A&P GROCERS NEW ENGLAND - A&P GROCERS NE**

Ad Assumption Builder

Properties **Items**

Item filtering

Customer: Part:

Site: PrimarySalesRep:

Territory:

Available Items

| Part | ProductFamily | ProductType | Set Promo |
|------------------|---------------|-------------|-------------------------------------|
| 111784VHY | CARB | | <input checked="" type="checkbox"/> |
| 12192TB | CARB | | <input type="checkbox"/> |
| 12194VHY | CARB | | <input checked="" type="checkbox"/> |
| 12X25X7TC | CARB | | <input checked="" type="checkbox"/> |
| T0248000 | CARB | | <input type="checkbox"/> |

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.

Promotions Management

To create or edit an Ad, select a customer first

Ads

Ad Assumption Builder

Properties Items

| General Properties | Administrative |
|--|---|
| <p>Customer Name: <input type="text" value="A&P GROCERS NEW ENGLAND"/></p> <p>Mkt Code: <input type="text" value="A&P GROCERS NEW ENGLAND"/></p> <p>*First Effective Date: <input type="text" value="6/3/2007"/> ▼</p> <p>*Last Effective Date: <input type="text" value="6/10/2007"/> ▼</p> <p># of weeks from production to delivery: <input type="text" value="1"/></p> <p>Ad Type: <input type="text" value="10% Off"/> ▼</p> <p>Percent Ad Lift: <input type="text" value="10"/></p> <p>Facility: <input type="text" value="A&P GROCERS NEW ENGLAND"/></p> <p>Completed By: Super User</p> | <p>Ad Number: 33226</p> <p>Date: 6/17/2009 12:55:15 PM</p> <hr/> <p>Total Ad Projection</p> <p>Base Line Cases: 0</p> <p>Incremental Cases: 0</p> <p>Total Cases: 0</p> |

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

| General Properties | Administrative |
|---|--|
| Customer Name: A&P GROCERS NEW ENGLAND Mkt Code: A&P GROCERS NEW ENGLAND *First Effective Date: 6/3/2007 *Last Effective Date: 6/10/2007 # of weeks from production to delivery: 1 Ad Type: 10% Off Percent Ad Lift: 10 Facility: A&P GROCERS NEW ENGLAND Completed By: Super User | Ad Number: 33226 Date: 6/17/2009 12:55:15 PM <hr/> Total Ad Projection Base Line Cases: 0 Incremental Cases: 0 Total Cases: 0 |

| Promised Dates | |
|--------------------|----|
| 2007/6/2 Saturday | 12 |
| 2007/6/3 Sunday | 12 |
| 2007/6/4 Monday | 12 |
| 2007/6/5 Tuesday | 12 |
| 2007/6/6 Wednesday | 12 |
| 2007/6/7 Thursday | 12 |
| 2007/6/8 Friday | 12 |
| 2007/6/9 Saturday | 16 |

20. Click on Recalc Dependent Items to recalculate the individual items' Ad Assumptions.

21. Click Commit when finished to save your Promotion to the Living Master.

8-2: 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.

8-3: 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.

8-4: 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

8-5: 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

8-6: 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 9: Profile Settings

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

Planning Portal 4

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

Profile Settings

Items | Properties

Customer

- All Available
- A&P GROCERS NEW ENGLAND
- A&P GROCERS NY
- ALBERTSONS INDIANAPOLIS
- ALBERTSONS/CINCINNATI
- ALBERTSONS/MID-ATLANTIC
- COMPASS GROUP MINNEAPOLIS
- COMPASS GROUP SALEM

Part

- All Available
- 02051VC
- 031061SC
- 031072VTBY
- 033063SC
- 033072VTBY
- 03817-354 N70R
- 03837-354 N70R

Site

- All Available

PrimarySalesRep

- All Available
- Ausfaux
- Rhymes
- Santos

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.

The screenshot shows a software interface with the following elements:

- Territory:** A dropdown menu currently showing "All Available".
- Level:** A dropdown menu currently showing "DM5-4- Food-Beverage Living I".
- Get items:** A button to retrieve data based on the selected filters.
- Buttons:** A row of four buttons: "Add", "Remove", "Add All", and "Remove All".
- Text Area:** A list of five series identifiers: [111784VHY] [PPFI LASAGNA 12/16] [00486004-APG], [12192TB] [PPFI ELBOWS 20/16] [00486004-APG], [12194VHY] [PPFI ROTINI 12/16] [00486004-APG], [12X25X7TC] [PPFI LINGUINE 20/16] [00486004-APG], and [T0248000] [PPFI SPAGHETTI 20/16] [00486004-APG].
- Footer:** "QAD Demand Driven Suite" and "http://www.QAD.com".

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.

Profile Settings

Items Properties

Apply In

Selected Series (Select Series in Items Tab)

Whole Tree

Scenario DM5-4- Food-Beverage Living Master

Affected Data Field

Forecast

Profile Scenario

| Sec | Act | Profile | Start | End | Offset | Total | Profile Start | Profile Recycle |
|-----|--------------------------|---|---|---|--------------------------|---|---|--------------------------|
| 1 | <input type="checkbox"/> | ▼ | ▼ | ▼ | <input type="checkbox"/> | <input style="width: 100%;" type="text"/> | ▼ | <input type="checkbox"/> |
| 2 | <input type="checkbox"/> | ▼ | ▼ | ▼ | <input type="checkbox"/> | <input style="width: 100%;" type="text"/> | ▼ | <input type="checkbox"/> |
| 3 | <input type="checkbox"/> | ▼ | ▼ | ▼ | <input type="checkbox"/> | <input style="width: 100%;" type="text"/> | ▼ | <input type="checkbox"/> |
| 4 | <input type="checkbox"/> | ▼ | ▼ | ▼ | <input type="checkbox"/> | <input style="width: 100%;" type="text"/> | ▼ | <input type="checkbox"/> |
| 5 | <input type="checkbox"/> | ▼ | ▼ | ▼ | <input type="checkbox"/> | <input style="width: 100%;" type="text"/> | ▼ | <input type="checkbox"/> |
| 6 | <input type="checkbox"/> | ▼ | ▼ | ▼ | <input type="checkbox"/> | <input style="width: 100%;" type="text"/> | ▼ | <input type="checkbox"/> |

QAD Demand Driven Suite <http://www.QAD.com>

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.

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