Oracle® Demantra Predictive Trade Planning

User's Guide

Release 7.3

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Part No. E05137-04

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Preface

Intended Audience

Welcome to Release 7.3 of the *Oracle Demantra Predictive Trade Planning User's Guide.*

See Related Information Sources on page xii for more Oracle Applications product information.

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Structure

This chapter describes how to create promotions and make changes if needed, as part of the PMO business process.

Related Information Sources

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Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables

get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Part 1

Introduction and Basics

1

PTP Introduction

This chapter covers the following topics:

- Overview
- Dashboard: Collaborator Workbench
- Predictive Trade Planning Business Processes and Worksheets
- Promotion Modeling and Optimization Business Processes and Worksheets
- Forecasting and Simulation
- Optimization

Overview

Oracle Demantra's Predictive Trade Planning and Trade Promotion Optimization applications provide a complete Predictive Trade Planning (PTP) solution, is a powerful combination of a financial application to manage retailer trade funds coupled with a comprehensive promotion analysis tool specifically targeted at manufacturers for the purpose of better planning trade funds usage. The application considers sales, point of sale (POS), and syndicated data to provide advanced pre and post promotion analysis:

- Historical event evaluation, including detailed analysis of lift components, taking into account both direct and indirect effects
- Base volume forecast by item over time based on past history
- Event planning
- Incremental volume forecast based on user-defined promotional variables and causals (by product, time, price, vehicle, buydown, and so on)
- Detailed fund analysis, including quota versus actuals
- Event optimization taking into consideration a variety of constraints (time, budget,

spend, number of events, and so on)

While Oracle Demantra's PTP solution provides standard, out-of-the-box configuration to achieve this, it also recognizes that every manufacturer manages accounts and trade promotions a bit differently. The application is highly configurable, allowing Oracle Demantra consultants and trained users to tailor them to the customer's needs, both today and as these needs evolve in the future.

Dashboard: Collaborator Workbench

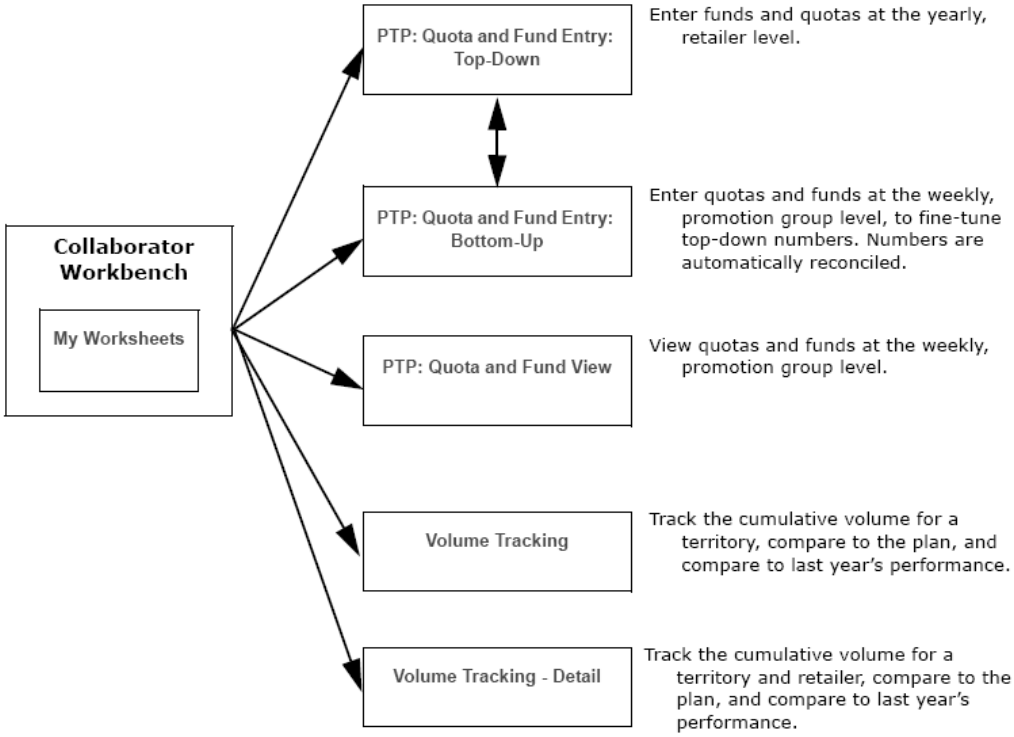
The Collaborator Workbench is the starting point for Oracle Demantra's PTP solution. You log into the application and immediately have access to a number of key performance indicators (KPIs), displayed inside content panes. PTP provides several out-of-the-box content panes, and you can add others.

From Collaborator Workbench, you can launch worksheets and review tasks. Each worksheet is a working environment designed to support specific business processes. In general, you can open worksheets from within Collaborator Workbench or from worksheets that are currently open.

For details, see Opening Worksheets, page 6-9.

Predictive Trade Planning Business Processes and Worksheets

For PTP business processes, you start in the Collaborator Workbench and launch any of the PTP worksheets. The following diagram shows the overall workflow:



PTP includes the following worksheets:

- PTP: Quota and Fund Entry: Top-Down allows headquarters to manage funds, including fund rates and fixed funds as well as sales quotas, at a fairly high level (yearly, for retailers and territories). PTP provides the following standard set of promotion funds: Brand Development Funds (BDF), Market Development Funds (MDF), and slotting funds. In turn, both BDF and MDF include a fixed portion (for fixed funds) and a volume-dependent portion, per common practice.

- PTP: Quota and Fund Entry: Bottom-Up is provided to help you fine-tune quotas and funds, by displaying their breakout, weekly, by promotion group. You can edit values at this level and they are automatically rolled up to the higher level. At all times, upper-level and lower-level numbers are automatically reconciled.

- PTP: Quota and Fund View is a read-only version of the bottom-up entry worksheet. It allows you to view authorized funds against your sales quota.

- Volume Tracking is the central location where product, territory, and account volumes are forecasted and monitored to ultimately feed volume requirements to operations. Fund planning already covered is integrated with volume planning, because forecast volumes drive budgets in live accrual environments and drive spending for case rate allowances and other variable spending deals.

- Volume Tracking - Detail is similar to Volume Tracking, but allows you to drill

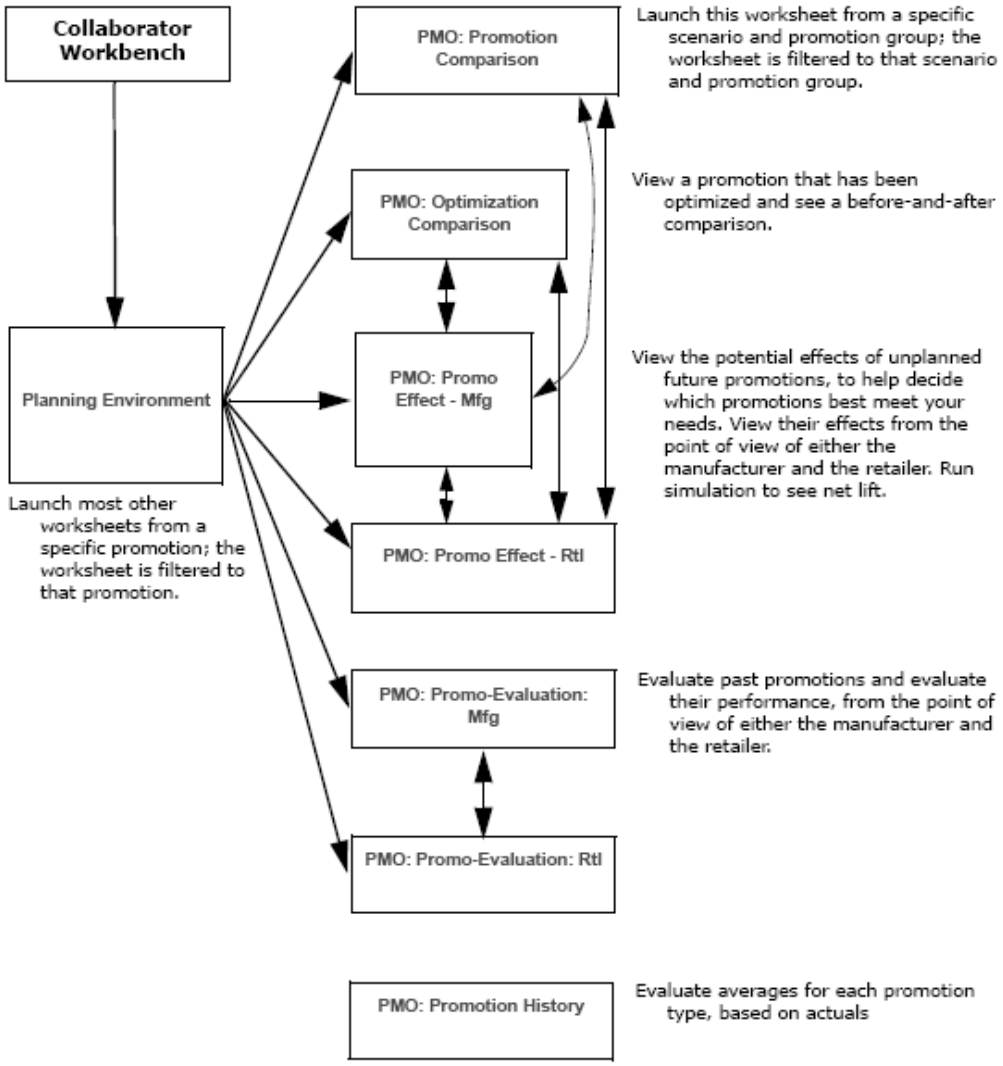
down to the retailer level.

For details, see PTP: Managing and Viewing Quotas and Funds and PTP: Tracking Volume.

Promotion Modeling and Optimization Business Processes and Worksheets

For PMO business processes, you generally start in the Collaborator Workbench, and then open the Planning Environment worksheet. From there, you right-click a promotion and launch any of the PMO worksheets to see data for that promotion. Or, to compare multiple promotions, you right-click a scenario and launch a worksheet to view the promotions in that scenario side-by-side. From within an open worksheet, you can also launch a different worksheet, to look at the same promotion in a different way.

The following diagram shows the overall workflow:



PMO includes the following worksheets:

- Planning Environment is the entry point to both historical and planned event analysis. Event planning consists of creating and managing a calendar of promotional events, and understanding their impact on sales, promotion spending, and profitability, as well as their correlation with sales quotas. The Planning Environment provides all this critical information in one place. See PMO: Planning Promotions - Introduction to the Planning Environment, page 9-1.

- PMO: Promo Effect - Mfg display the effects of future promotions, to show the impact on volume and spending, as well as a breakdown of the event with respect to the sales dollars and profit generated for the manufacturer. See PMO: Examining and Comparing Promotions - Examining Promotions from the Manufacturer's Point of View, page 11-2.

- PMO: Promo Effect - Rtl is similar to the previous worksheet, but shows the breakout of cannibalizing effects as a retailer would view them.

- PMO: Promotion Comparison helps you compare and evaluate multiple promotions in a scenario, so that you can determine how best to spend trade dollars. Typically you create multiple potential promotions in the Sandbox and compare them side by side here. See PMO: Examining and Comparing Promotions - Comparing Promotions in a Scenario, page 11-8

- PMO: Optimization Comparison provides the capability to simultaneously view and compare the results of a promotion before and after running optimization. After comparing, you can accept, reject, or re-optimize the promotion. Once satisfied with the results of a promotion, you can add it to your current plan. See PMO: Simulation and Optimization - Overview, page 11-2.

- PMO: Promo-Evaluation: Mfg and PMO: Promo-Evaluation: Rtl provide a detailed post-promotional analysis of each individual promotion (by compare forecast to actual performance), from the manufacturer's point of view and the retailer's point of view, respectively. Here, you can view the breakdown of each event with respect to the sales dollars and profit generated for the manufacturer and retailer. See
  - PMO: Reviewing Past Performance- Evaluating Performance from the Manufacturer's Point of View, page 12-2.
  - PMO: Reviewing Past Performance- Evaluating Performance from the Retailer's Point of View, page 12-5.

- PMO: Promotion History displays the past averages for each promotion type, in a number of different contexts. See PMO: Reviewing Past Performance - Overview, page 12-1.

Forecasting and Simulation

Typically, the Analytical Engine is run periodically in batch mode, perhaps weekly, to generate a forecast for all items and locations in the system. The forecast data includes total volume, base volume (volume in the absence of promotions), pre- and post-promotional volume, and volume due to cannibalization. This forecast, including the detailed breakdown of promotional effects, is available for future dates and for the past—so that you can better understand promotions that have already run.

Running the Analytical Engine in batch mode may take hours, depending on the volume of data, so PTP also provides the ability to run simulations. You can run a simulation quickly, see the results, and accept or reject them.

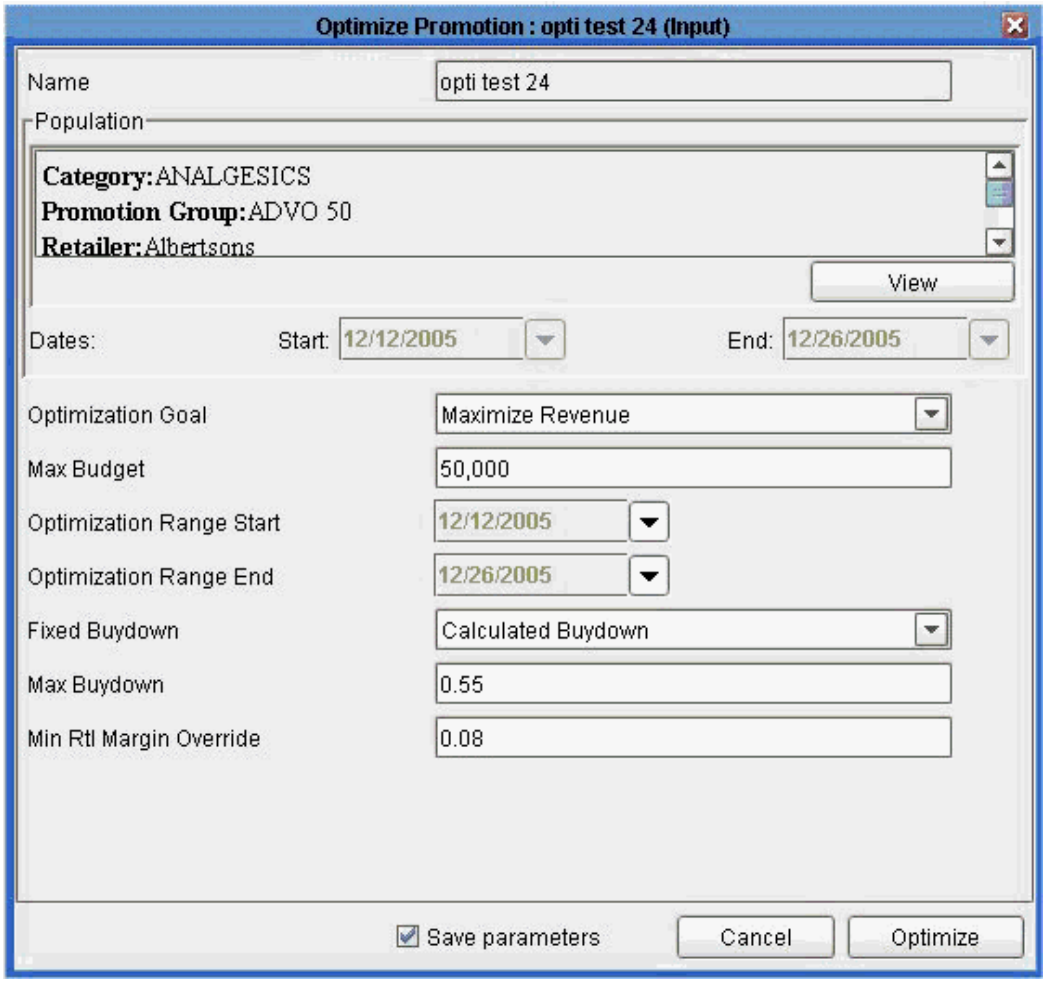
A simulation generates a forecast for a much smaller set of data, typically a single promotion, and provides immediate data for the total volume, base volume (volume in the absence of promotions), pre- and post-promotional volume. Depending on where

you perform a simulation, you may also be able to see cannibalization; this depends on whether the worksheet contains all the data that the Analytical Engine needs to find cannibalization effects.

Optimization

The effectiveness of a promotion depends on many factors, as noted earlier. To help you find the most effective promotion for your needs, PTP provides the ability to optimize a promotion.

The Promotion Optimization module uses the previously stored results of the Analytical Engine and information about past variations in the promotions. You provide a specific goal (optimizing units, revenue, or profit) and constraints (such as minimum retailer margin), and the optimizer determines the best set of promotion properties.


Optimize Promotion : opti test 24 (Input)
Name
opti test 24
Population
Category: ANALGESICS
Promotion Group: ADVO 50
Retailer: Albertsons
View
Dates:
Start: 12/12/2005
End: 12/26/2005
Optimization Goal
Maximize Revenue
Max Budget
50,000
Optimization Range Start
12/12/2005
Optimization Range End
12/26/2005
Fixed Buydown
Calculated Buydown
Max Buydown
0.55
Min Rtl Margin Override
0.08
Save parameters
Cancel
Optimize

2

Predictive Trade Planning Concepts

This chapter covers the following topics:

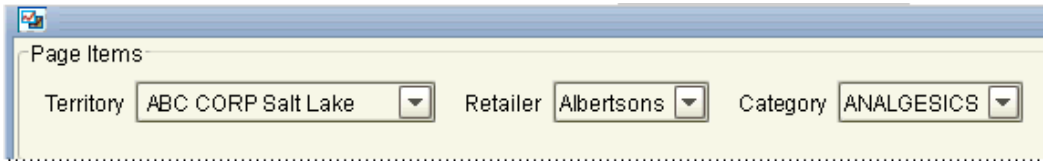
- Worksheet Basics
- PTP Data Hierarchy
- Promotions
- Retailer Profiles
- Funding
- Promotion Costs and Spending
- Volume and Volume Breakdown
- Data Access

Worksheet Basics

This section provides a closer look at the basic data elements in worksheets, introduced previously in "Tutorial: Getting Acquainted with Worksheets."

Levels (Segmentation)

A level lets you aggregate or group data in a worksheet.



For example, if you select a territory, then a retailer, and then a product category to display, the data in the rest of the worksheet is aggregated across this territory, retailer, and category.

Oracle Demantra uses several different kinds of levels:

- Item levels group and aggregate data according to characteristics of the items you sell. For example, PTP item levels include brand, category, and promotion group.
- Location levels group and aggregate data according to the locations where they are sold. For example, PTP location levels include retailer, territory, and so on.
- Promotion levels correspond to promotional events.

In generic terminology, the word *member* refers to a unit within a level. For example, Albertson's is a member of the retailer level.

Series (Measures)

A worksheet table or graph displays series data associated with the current selection.

T1-World Brands Comb - Albertsons - ANALGESICS - EXEDRA 100

Scenarios	Promotion	Start Ship	End Ship	Start Event	# Wks	Veh Type	Veh $	Cons Promo	Shelf Price	Sale Price
Sandbox	Test Opti Scen			04/03/2006	4	FEATURE	$20,000	N/A	$5.89	$4.19
	Test New promotion			02/08/2006	2	FEATURE	$8,000	N/A	$5.89	$5.39
	Test Past End Date			01/09/2006	1	F&D	$0	N/A	$5.89	$0.00
	Test Cannibalization			02/13/2006	1	FEATURE	$5,000	N/A	$5.89	$5.09
	Summary									
Current Year	Fall back pricing	10/10/2005	10/10/2005	10/10/2005	1	F. SHOPPER	$1,250	N/A	$5.89	$5.29
	Hot sales days	08/08/2005	08/08/2005	08/08/2005	1	FEATURE	$2,500	N/A	$5.89	$4.99
	Summary									
Summary										

PTP provides many kinds of series:

- Some series describe properties of item-location combinations; for example, Sales Quota. Others describe properties of promotions; for example, Veh Type.
- Most series have numeric values, but some have string or date values. For some series (like Cons Promo and Veh Type), you choose a value from a dropdown list.
- Some series are editable, some are editable only for specific dates, and some are not editable at all.
- Some are based on imported data.
- Some series are shown in different colors, depending on the data values or on other local conditions. For example, Incr Mfg Prft is shown in red if profit is negative.

PTP Data Hierarchy

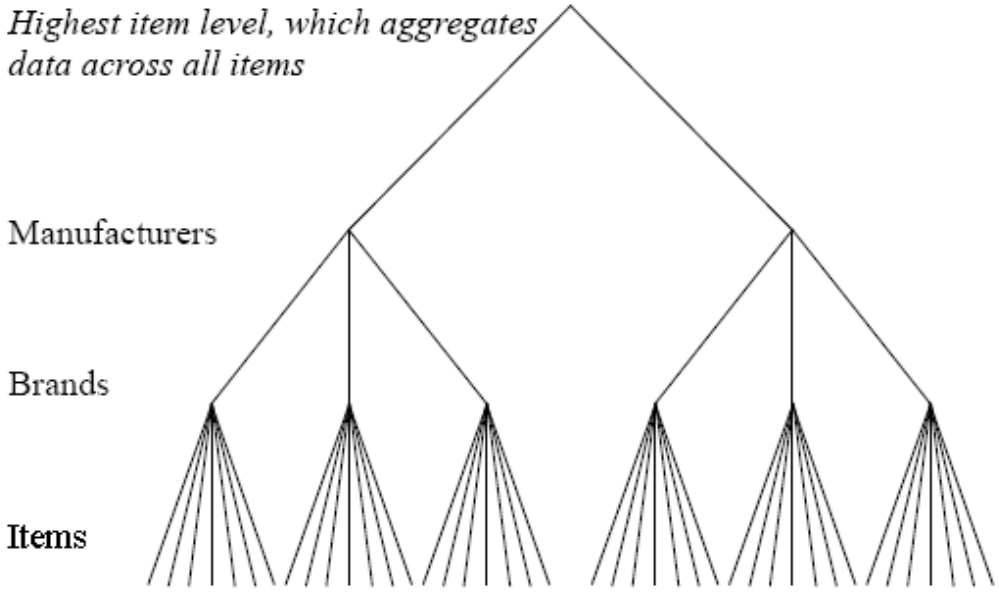
PTP uses specific levels, organized into a flexible set of hierarchies. Some of these levels are not used in PTP worksheets, but are available if needed for reporting. Products are organized into several hierarchies, and locations are organized into another set of hierarchies. This section provides an overview.

Product Hierarchies

The lowest item level is the Item. PTP organizes items into four hierarchies.

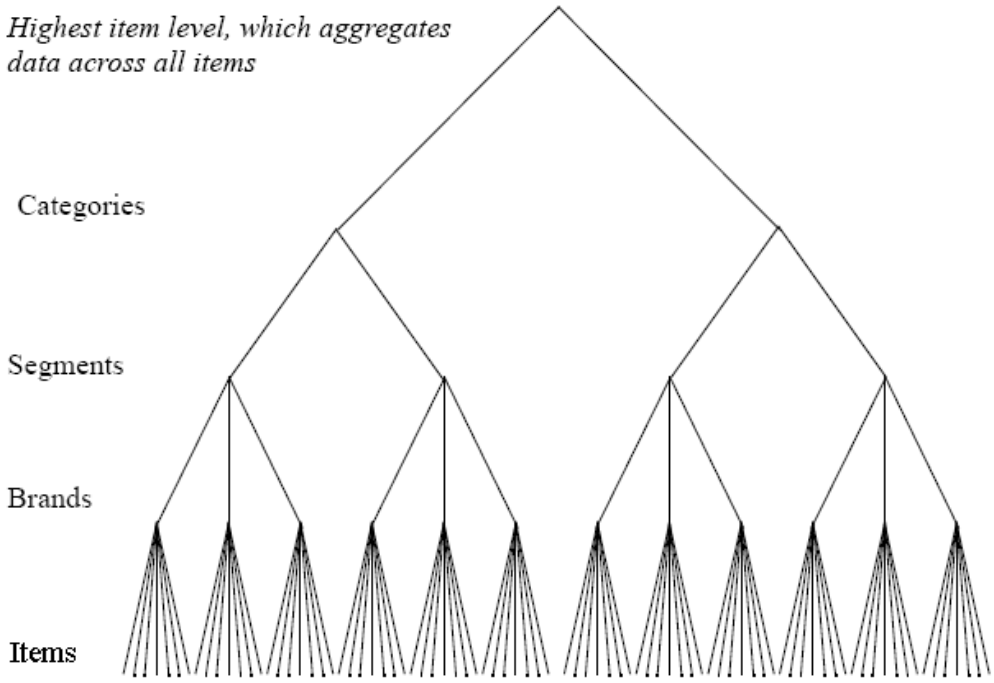
The Manufacturer Hierarchy

In the manufacturer hierarchy, items belong to brands. Brands, in turn, belong to manufacturers.



The Category Hierarchy

In the category hierarchy, items belong to brands, which belong to segments. Segments belong to categories.



The Promotion Group Hierarchy

In the promotion group hierarchy, items are organized into promotion groups. Promotions are usually created at this level, applying to entire sets of items.

The Product Line Hierarchy

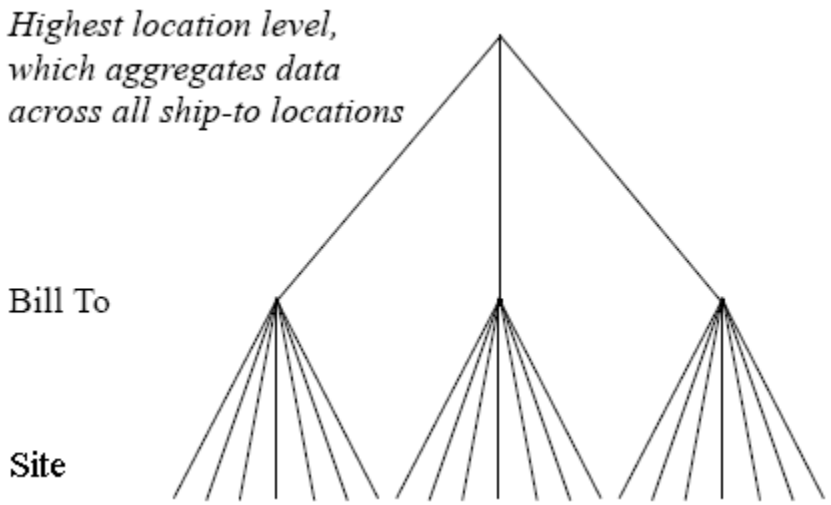
In the product line hierarchy, items are organized into product subgroups, which are organized into product groups, which are organized into product lines.

Location Hierarchies

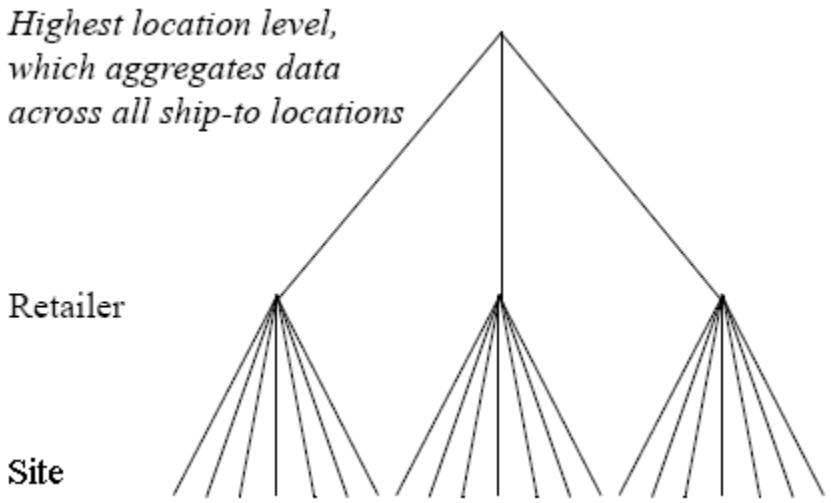
PTP provides two location levels that are both at the same (apparent) lowest level. These levels are Ship To and Territory. Internally, PTP has only one lowest location level, which is a combination of Ship To and Territory, created automatically by Oracle Demantra.

Ship To Hierarchies

Ship To locations are organized by Bill To locations, as follows:

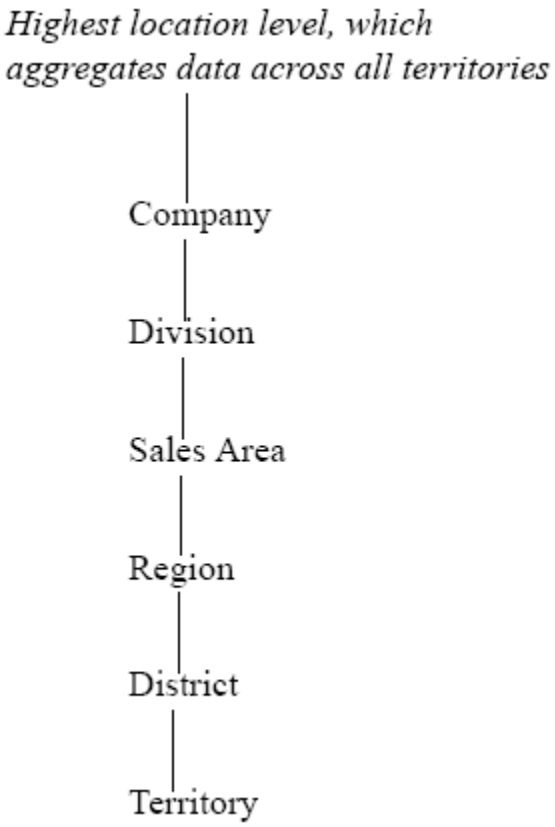


Ship To locations are also organized by retailer.



Territory Hierarchy

The Territory locations are organized in a single, fairly deep hierarchy. Territories are grouped into districts, which are grouped into regions. Regions, in turn, are grouped into sales areas, which are grouped into divisions, which are grouped into companies. The following figure sketches these relationships without indicating the members of each level:



The Territory-Retailer Level

PTP also uses another level, the combined territory-retailer level, for analytic purposes. This level is meant for use only by the Analytical Engine.

Promotions

A promotion is an occurrence that starts at a specific date, has a certain duration, and has a certain time-varying effect on sales. PTP models promotions as another kind of level, as mentioned earlier, so that they can be used in worksheets in all the same ways as item and location levels.

In PTP, you usually create promotions at the retailer-promotion group level. Multiple promotions can be associated with a retailer and promotion group during the same time bucket.

How PTP Uses Promotion Properties

PTP models a common set of promotion properties that are known to affect the impact of promotions. These properties include the following:

- Vehicle type
- Sale price
- Promotion timing and duration

Each of these properties can have a different effect on the forecast or simulations. When the Analytical Engine runs (either in batch mode or simulation mode), it uses mathematical models to determine what effect each property had in the past. It uses this information to predict how each future promotion will behave.

These properties also affect how the Promotion Optimization behaves. See Optimizing a Promotion, page 10-4.

Promotions and Scenarios

Because it is useful to separate tentative promotions from real ones, most PTP worksheets organize promotions into two scenarios: Current Year and the Sandbox. When you create a new promotion, you place it in the Sandbox as long as it is tentative. When the promotion is definite (when mark its status as Planned), then you should move the promotion to the Current Year scenario.

A third scenario, actuals, contains promotions from previous years. These promotions are excluded from most PTP worksheets because they fall outside the span of time used in these worksheets.

Promotion Life Cycle and Status

PTP models a distinct life cycle for every promotion. The Event Status series shows the stage in which a given promotion resides; you can see this series in the Planning Environment and other worksheets. Typically a qualified user changes the status when appropriate.

1. When a promotion is first created, its status is initialized as Unplanned. Unplanned promotions are considered hypothetical and do not have an impact on the promotion funds or the forecast.

2. Typically you run a simulation to see the baseline and incremental volume for the proposed promotion. In addition, the system will calculate measures to be used for the cost benefit review. These include profit for the manufacturer and retailer, available fund balances as well as the proposed cost for the promotion.

3. Once you are ready to use the event in forecasting, you change its status event to Planned. This causes several things to happen:
   - The cost of the promotion is deducted from the available balance of funds.
   - The forecast is updated.

4. The next stage is approved.

5. When you have a firm commitment from the retailer, you move the promotion to the committed stage. When a promotion is marked as committed, PTP takes a snapshot of details of the promotion, for use in later analysis. With this information, it will be possible to compare the total projected sales with the total actual sales, for example.

   Once a promotion has been committed, it is no longer editable.

6. After the promotion runs, the retailer may require payment for the promotion. You can advance the status to Partial Paid or to Paid to record the payment status.

7. Finally, the last stage is closed.

Retailer Profiles

Given that different retailers run different types of events differently, PTP stores retailer profiles that include details such as the following:

- Average everyday selling margin
- Minimum required event margin
- Default vehicle costs for each type of event

When you create a promotion of a given type for a retailer, PTP automatically initializes the vehicle cost as appropriate for that retailer, saving you the work of making a manual adjustment each time. You can override this vehicle cost if necessary.

The other retailer details affect the optimization process, which finds the best possible promotion for a given goal, considering the retailer-specific constraints.

PTP provides default settings that you can use for any retailer, so that you can start by providing details for just a few key retailers, without needing to enter all of them. You can modify these default settings as needed.

Funding

PTP provides the following standard set of promotion funds:

- Brand Development Funds (BDF)
- Market Development Funds (MDF)
- Slotting funds

In turn, both BDF and MDF include a portion for fixed funds and a volume-dependent portion, per common practice. For example, the total authorized BDF fund is computed

as follows:

rate * volume + fixed funds

This means that when the planned volume increases, you accrue funding. That is, the authorized funding also increases.

In the Planning Environment, the Fund Balances window displays a summary of the funds and their balances. To set fund amounts, see PTP: Managing and Viewing Quotas and Funds - Overview, page 7-1.

Promotion Costs and Spending

Following standard practice, PTP models the promotional spend as a combination of fixed spending and per-unit spending. Specifically, apart from slotting costs, the spend for a given promotion is computed as follows:

vehicle costs + volume * buydown

For a given retailer, each vehicle type is assumed to have its own default cost. When you specify the vehicle type for a promotion for a retailer, PTP looks up and displays that cost. You can override this cost if necessary. As part of specifying the promotion details, you also specify the buydown, or discount per promoted unit that will be paid to the retailer (either as billback from the retailer or as an off-invoice settlement with the retailer).

In addition to specifying the promotion cost as described here, you also control how that promotion is to be funded. Specifically, when you mark a promotion as planned, you indicate how to split the cost between MDF and BDF; see Marking a Promotion as Planned, page 9-8.

Volume and Volume Breakdown

In general, PTP volume calculations use actuals for the past and forecasted volume for the future. So to compute volume as needed for total MDF or BDF funds for the year, PTP combines the actuals to date and the forecast.

In addition to providing the overall volume, PTP shows a breakdown of that volume into the following categories:

- Base volume.
- Incremental volume due to a promotion. Part of this incremental volume is due to cannibalization effects. The manufacturer and the retailers have different points of view about cannibalization, as noted below.
- Pre and post-promotional effects. Sales are usually lower just before and after a promotion, as consumers take advantage of the better price during the promotion itself. The Analytical Engine computes the total volume before and after the

promotion, as a result of the promotion, so that you can include this in your overall analysis.

Cannibalization

In addition to computing the incremental volume due to a promotion, the Analytical Engine computes specific cannibalization effects. Cannibalization includes multiple components, and the manufacturer and the retailer have different points of view.

- Product switching, as described in Cannibalization Seen by the Manufacturer, decreased sales due to sales at another retailer.
- Decreased sales of other products of the same brand at the same retailer. For example, sales of Exedra 24 were depressed by the promotion on Exedra 100, at the same retailer.
- Decreased sales of other brands (of the same manufacturer), regardless of retailer. For example, sales of Advo 50 were depressed by the promotion on Exedra 100, which is made by the same manufacturer.

Cannibalization Seen by the Manufacturer

PTP computes cannibalization that is undesirable to the manufacturer.

Lift Decomposition Table - Mfg

Feb End Sale-Albertsons-ANALGESICS

Lift Decomp - Mfg

Albertsons - ANALGESICS - Feb End Sale

Company	Brand	Promotion Group	Ttl Evt $	Incr Evt $	Basc Evt $	Net Incr Evt $	Canbl $	Pre-Post $	Canbl Vol Mfg	Pre-Post Vol
World Brands	EXEDRA	EXEDRA 100	$47,463	$35,545	$11,917	$33,221	$0	$2,324	0	-541
		EXEDRA 24	$0	$0	$0	($195)	$195	$0	-87	0
		EXEDRA 50	$0	$0	$0	($429)	$429	$0	-141	0
		Summary				$32,597	$624	$2,324		
	ADVO	ADVO 50	$0	$0	$0	($2,509)	$2,509	$0	-809	0
	Summary					$30,088	$3,133	$2,324		

This worksheet table shows a promotion group where a promotion was run and all promotion groups that were adversely affected, according to the manufacturer.

The row in blue indicates the promotion group (Exedra 100) on which you ran a promotion. In this row, you can see the total event dollars, incremental event dollars, net incremental event dollars and so on, for the promotion. Note that for Exedra 100, there was zero dollars of cannibalization and $2324 of pre- and post-promotional effect.

On the other hand, examine the other promotion groups here and notice that they were all cannibalized. Of course, for these promotion groups, there was zero direct lift, by definition, as the promotion did not run on them.

Cannibalization Seen by the Retailer

PTP also computes cannibalization that is undesirable to the retailer.

Lift Decomposition Table - Rtl

Feb End Sale-Albertsons-ANALGESICS

Lift Decomp - Rtl

Albertsons - ANALGESICS - Feb End Sale

Company	Brand	Promotion Group	Ttl Evt $ Rtl	Incr Evt $ Rtl	Base Evt $ Rtl	Net Incr Evt $ Rtl	Canbl $ Rtl	Pre-Post $ Rtl	Canbl Vol Rtl	Pre-Post Vol
World Brands	EXEDRA	EXEDRA 100	$58,390	$43,729	$14,661	$40,545	$0	$3,184	0	-541
		EXEDRA 24	$0	$0	$0	($259)	$259	$0	-87	0
		EXEDRA 50	$0	$0	$0	($547)	$547	$0	-141	0
		Summary			$14,661	$39,739	$806	$3,184		
	ADVO	ADVO 50	$0	$0	$0	($3,230)	$3,230	$0	-809	0
	Summary				$14,661	$36,509	$4,036	$3,184		
Global Corp	NOTRIM	NOTRIM 24	$0	$0	$0	($132)	$132	$0	-44	0
Mega Products	TYITOL	TYITOL 50	$0	$0	$0	($521)	$521	$0	-130	0
Summary					$14,661	$35,857	$4,688	$3,184		

This worksheet table shows a promotion group where a promotion was run and all promotion groups that were adversely affected, according to the retailer. As before, the row in blue indicates the promotion group (Exedra 100) on which you ran a promotion.

Notice two promotion groups are listed here that were not seen in the manufacturer version: Notrim 24 and Tyitol 50. These promotion groups represent products that this retailer sells, but that are made by a different manufacturer. To the retailer, it is undesirable to cannibalize these promotion groups.

Data Access

By default, PTP uses a simple security model. Each sales representative has access only to his or her territories. A sales manager has access to all the territories of the representatives that he or she supervises.

3

Logging On and Getting Started

This chapter covers the following topics:

- Initial Logon and Download
- Logging Onto PTP
- Tutorial: Getting Acquainted with Worksheets
- Controlling Synchronization of Embedded Worksheets
- Logging Off PTP
- Ending a Hung Session
- Changing Your Password

Initial Logon and Download

The first time you log onto PTP, Oracle Demantra typically downloads and installs software. This operation occurs only once for each machine you use.

1. Open Microsoft Internet Explorer.

2. Enter the web address supplied by your system administrator. This URL probably has the following format:

   http://*server name*/*virtual directory*/portal/partnerLogin.jsp

   For example:

   http://frodo/demantra/portal/partnerLogin.jsp

   > **Tip:** Your Windows Start menu may also include a shortcut to this URL.

3. Type your name and password and click Login.

Oracle Demantra prompts you to install JRE.

4. When you are prompted to install Sun JRE 1.4.2_10, do so. Choose the Typical installation and accept all the default values, unless otherwise advised by your system administrators.

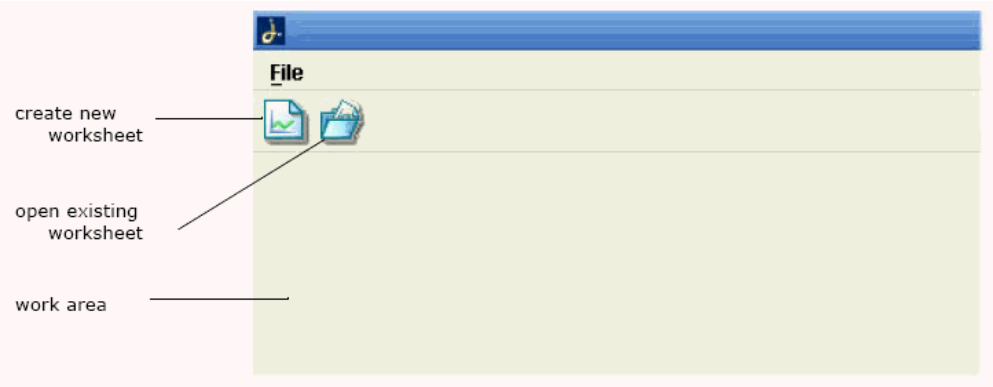
   Note: Oracle Demantra uses Sun JRE 1.4.2_10. If you are prompted to install a later version of JRE, do not do so.

   To prevent Java from searching for updates, open the Java control panel. On the Update tab, make sure to deselect the check box Check for Updates Automatically.

Next, Oracle Demantra displays a dialog box that asks if you want to trust the signed application distributed by Oracle. The dialog box is slightly different depending on your configuration.

5. Click Yes (or Always) or Start, depending on which dialog box is displayed.

   After the initial configuration is completed, Oracle Demantra displays a new browser window. The page contains a menu bar, a tool bar, and a work space that is initially empty.



6. Click File > Open.

7. Click a worksheet in the list and then click Open.

   Now the work area displays a worksheet, and the menu bar and tool bar have many more options.

   See also

   Creating or Editing a Worksheet or Content Pane, page 13-3.

Logging Onto PTP

If you have already performed the initial setup (see Initial Logon and Download, page 3-1), then log on as follows.

To log onto PTP:

1. Open Microsoft Internet Explorer.

2. Enter the web address supplied by your system administrator. This URL probably has the following format:

   http://*server name/virtual directory*/portal/partnerLogin.jsp

   For example:

   http://frodo/demantra/portal/partnerLogin.jsp

   > **Tip:** Your Windows Start menu may also include a shortcut to this URL.

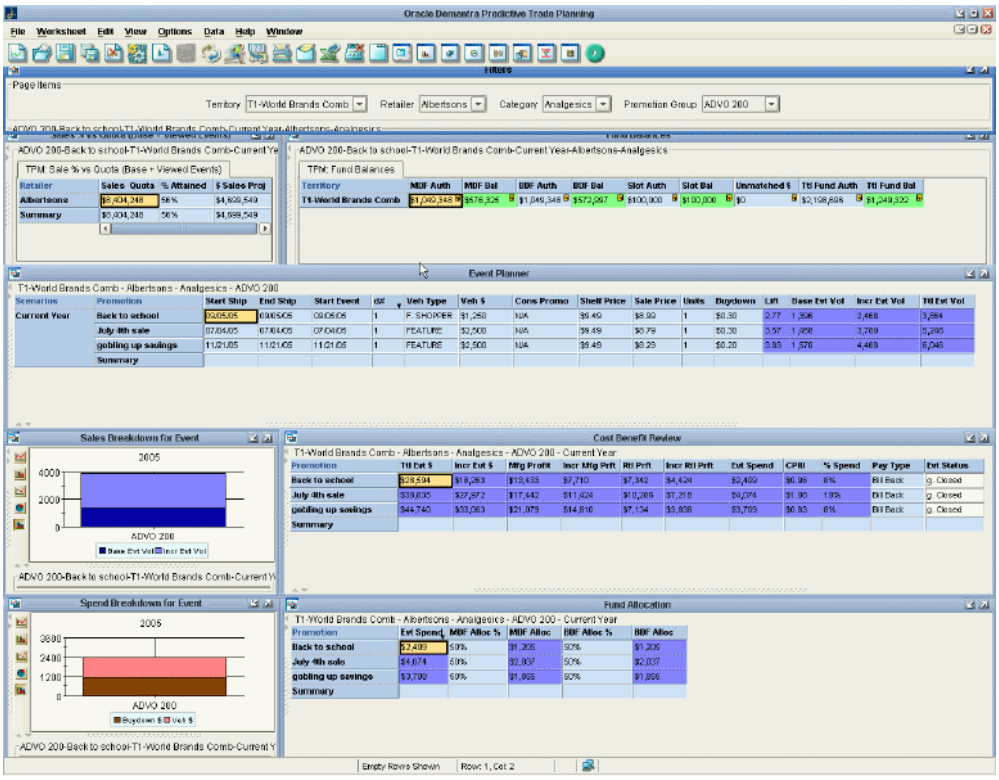
3. Type your name and password, and then click Login.

Tutorial: Getting Acquainted with Worksheets

To view and edit data, you work within an environment called a worksheet. Each worksheet is a working environment designed to support specific business processes. However, all worksheets share certain common characteristics and behavior. This exercise is meant to help you get acquainted with any worksheet.

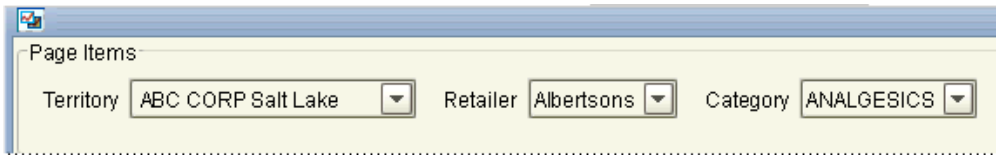
1. In My Worksheets (in Collaborator Workbench), click Planning Environment.

2. If the worksheet does not show data, click Data > Rerun. Or click the Run button.



3. Scan the windows within the worksheet.

   First, most worksheets contain an area that you use to select the data to display. This area is sometimes displayed as a treelike hierarchy).



   When you make a selection here, that changes anything of a lower level that is displayed elsewhere in the worksheet. For example, if you change the selection, you would see different promotions.

   Second, worksheets contain two different kinds of tables, and it is important to know the difference between them. The first kind of table is a normal table.

T1-World Brands Comb - Albertsons - ANALGESICS - EXEDRA 100 - Sandbox

Promotion	Ttl Evt $	Incr Evt $	Mfg Profit	Incr Mfg Prft	Rtl Prft	Incr Rtl Prft
Test Opti Scen	$527,686	$462,021	$92,503	$59,060	$63,241	$38,960
Test Proj	$232,973	$206,148	$108,654	$94,992	-$232,973	-$242,892
Summary						

The other kind of table is an *embedded worksheet* and appears as a tab within a tile. PTP uses embedded worksheets where they are needed for technical reasons.

Presidents sale - ABC CORP Salt Lake - Current Year - Albertsons - AN

Fund Balances

All

Territory	MDF Auth	MDF Bal	BDF Auth	BDF Bal
ABC CORP Salt Lake	$353,841	$257,572	$650,000	
Summary	$353,841	$257,572	$650,000	

Both kinds of tables are labeled to indicate what they contain.

For PTP, there is one behavioral difference between these kinds of tables:

- When you select a row in a normal table, that may affect selections elsewhere in the worksheet. For example, if you click in a promotion row, the worksheet focus moves to that same promotion throughout the worksheet, including the embedded worksheets.

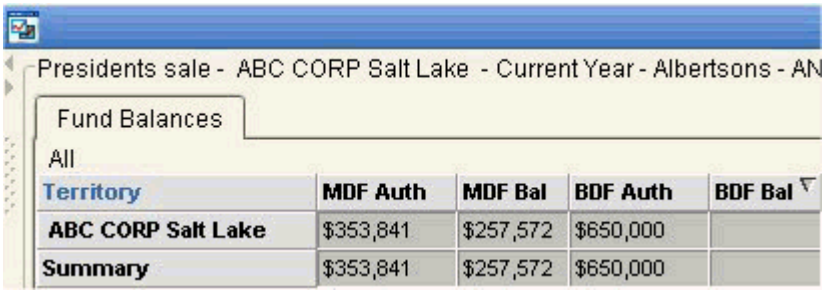
  Note: If you use the keyboard to move within a table, notice that the embedded worksheets are not automatically refreshed, for performance reasons.

- In contrast, when you select a row in an embedded worksheet, that has no effect on the focus in the rest of the worksheet.

A worksheet may also include graphs. Note that even if you click the graphs, it would have no effect on them. Note that you can change the graph style; see Changing the Graph Style

4. Right-click a data cell in one of the tables. Notice that you have options to copy and paste data, to edit multiple cells, and to display associated notes.

5. Right-click a promotion in the non-scrolling part of a worksheet table.



Notice that the right-click menu here provides options for working with promotions. Depending on your permissions, you may be able to do any of the following:

- View promotion attributes in a pop-up dialog box.
- Edit those attributes.
- Create new promotions.
- Copy, paste, or delete promotions.
- Open a promotion in a different worksheet (via the Open or Open With options).

  Note: When you open a worksheet this way, it is filtered to show just the promotion from which you launched it. Notice that the name of the promotion is added to the beginning of the worksheet title.

The right-click menu is also available for scenarios, in worksheets that display scenarios.

Controlling Synchronization of Embedded Worksheets

The embedded worksheets worksheet may or may not be synchronized with the rest of the worksheet. A worksheet runs faster if synchronization is off. On the other hand, you might find it less confusing to keep synchronization switched on. Also note that only promotion status changes have any effect on the data in embedded worksheets.

To control the synchronization:

Do one of the following:

1. Click one of the following toggle buttons in the tool bar.
   - Automatically synchronize the embedded worksheets with the rest of

worksheet

- Synchronize on demand

2. Select Options > Synchronize On Demand or Synchronize Automatically.

Logging Off PTP

To exit PTP

Close the browser window.

Any other open browsers are not affected.

See Ending a Hung Session, page 3-7.

Ending a Hung Session

If your session hangs due to network or other problems, you will not be able to log in again until the session times out. Alternatively, PTP provides a tool that you can use to end that session.

If your permission level is lower than System Manager, your own session is the only session you can see.

To end a hung session:

1. Browse to the following case-sensitive URL:

   http://*server name/virtual directory*/portal/userManagement.jsp

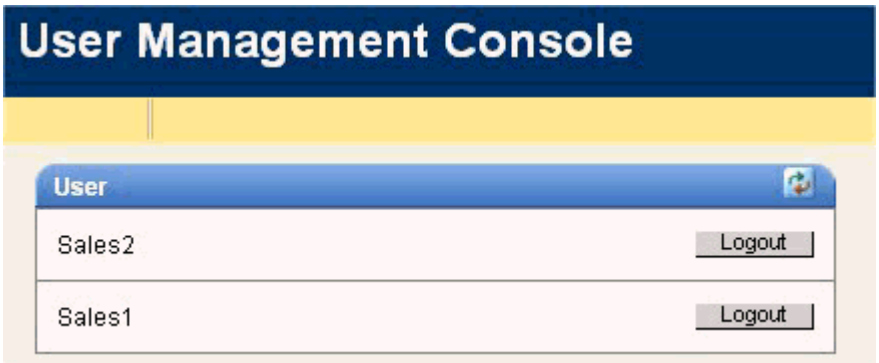
   For example:

   http://frodo/demantra/portal/userManagement.jsp

   A login page appears.

2. Type your username and password and then click Log on.

   Oracle Demantra displays the User Management Console screen.



3. Click Logout in the row corresponding to your user ID.

   A login page appears.

Changing Your Password

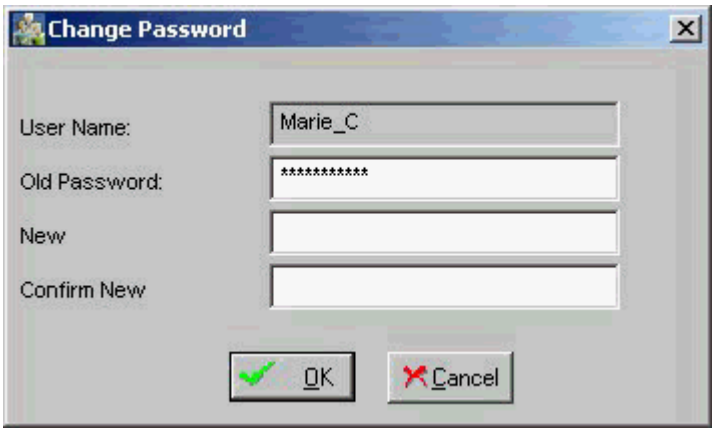
Any user can log into the Business Modeler and change his or her own password. If your permission level is lower than System Manager, your password is the only information you can access.

To change your password:

1. Log into the Business Modeler. If you do not have access to this, contact your Oracle Demantra system administrator.

2. Click Security > Change Password. Or click the Change Password button.

   The Business Modeler displays the Change Password screen.



3. Type your current password in the Old Password field.

4. Type your new password in the New and Confirm New fields.

5. Click OK.

4

Working with Data

This chapter covers the following topics:

- Editing Data
- Saving and Viewing Changes
- Sorting Worksheet Data
- Copying and Pasting Data
- Copying and Pasting to and from Microsoft Excel
- Exporting Data to Microsoft Excel
- Linking Data into Third-Party Reporting Tools (via DOL)
- Printing
- Viewing Notes
- Editing Notes
- Viewing and Managing Attachments to Notes
- Specifying Note Permissions
- Refreshing the Local Worksheet Cache
- Viewing the Audit Trail

Editing Data

This chapter describes the basics of working with data: how to edit data, add notes and attachments, print, exchange data with outside tools, and so on. It includes the following sections:

You can usually edit data in a worksheet, although not all series are editable. Note that within a given worksheet, if some of the tabs or windows show data at a higher aggregation level, the data is not editable in those tabs or windows.

Note: Within Oracle Demantra, do not use the following special characters:

- Single quote (')
- Double quote (")
- Ampersand (&)

If you use these characters, unexpected results may occur.

To change a data value manually

1. Select an editable data cell (white).

   The cell appears contained in a box.

2. Edit the value as needed.

To update multiple cells

1. In the table, select a range of cells.
2. Right-click the selection and then select Edit Cells.

   The Edit Cells dialog box appears.

3. In the dialog box, type a new value and then click OK.

To edit a retailer or a promotion

1. Right-click the retailer or promotion and then select Edit Retailer or Edit Promotion.
2. Edit as needed and then click OK.

   Note: Your changes are saved immediately in this case and cannot be undone.

To undo

Do one of the following:

- Click Edit > Undo.
- Click Data > Reset Manual Changes. This option restores the worksheet data to the

state in which you last saved it.

To redo an action

Click Edit > Redo.

See

- Saving and Viewing Changes, page 4-3
- Copying and Pasting Data, page 4-5

Saving and Viewing Changes

Apart from minor adjustments to the worksheet layout, the changes you make are not saved automatically.

Saving Changes

You save changes to data separately from changes to the worksheet definition:

- To save changes that you have made to the data in the worksheet, including changes to notes, click Data > Save Data. Or click the Save Data button.
- To save changes that you have made to the worksheet definition, click File > Save Worksheet. Or click the Save Worksheet button.
  - If you own the worksheet, this option saves the basic worksheet definition and its initial layout. For information on changing the worksheet definition, see Creating or Editing a Worksheet or Content Pane, page 13-3.
  - If you do not own the worksheet, this option saves only your own layout of the worksheet.

    See Worksheet Definition, Layout, and Local Adjustments, page 5-7.

Controlling the Recalc Option

Usually at least some of the read-only series are computed by means of a local expression. By default, Oracle Demantra recalculates all local series expressions automatically. In some cases, you may want to switch off this automatic recalculation:

To switch the Recalc option off

Click Data > Set Data Recalc Off. Or click the Recalc Off button.

To force calculation while Recalc is off

Click Data > Calculate.

To switch the Recalc option on

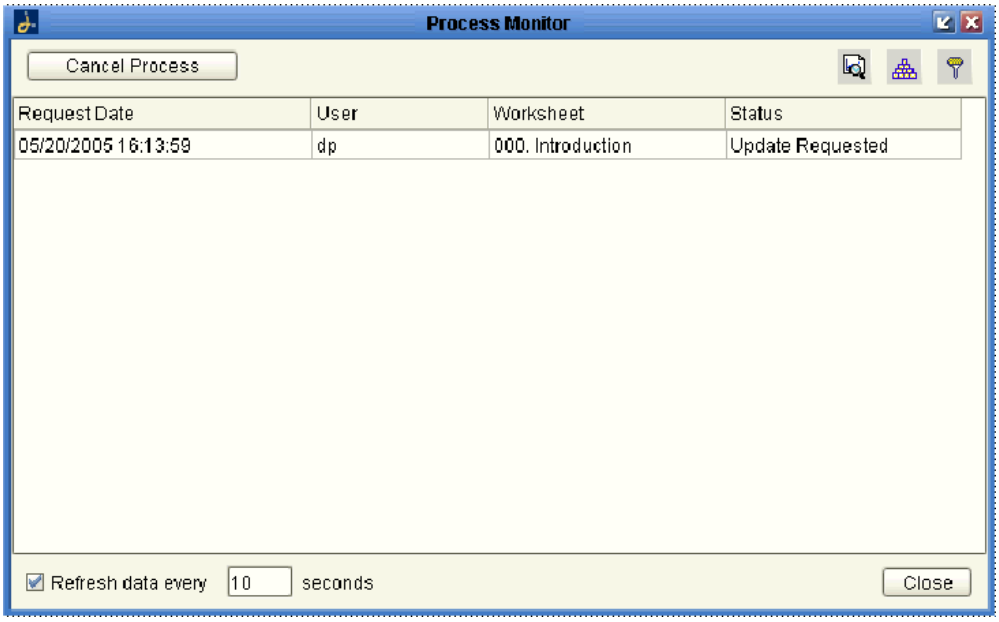
Click Data > Set Data Recalc On. Or click the Recalc On button.

Viewing Pending Changes to Data

To see pending data changes

1. Click Data > Update to save your data changes.

2. Click Data > Process Monitor. Oracle Demantra displays a screen that shows all data saves that are waiting to be processed.



If you are working at a relatively high level, this takes longer to run.

Sorting Worksheet Data

By default, the worksheet table is sorted in ascending order, according to the current contents of the x-axis, which is usually time. You can sort the worksheet table in either ascending or descending order, according to any series that is displayed in the table.

To sort the worksheet table

Click the header of the column by which you want to sort the worksheet.

Oracle Demantra then sorts the entire worksheet table, putting entries in this column in descending order. A downward arrow is added to the column header, to indicate that the table is sorted by this column.

Time	Fixed Plan Lift	Last Year Sale
03/01/2004		475,954
02/02/2004	10,000	372,066
04/05/2004		147,741

To resort in ascending order, click the column header again. Oracle Demantra resorts the table and changes the direction of the arrow.

To restore the default sorting order of the worksheet table

Click View > Reset Table Sort.

Copying and Pasting Data

You can copy and paste data within the worksheet table.

> **Note:** From a worksheet, you can also paste data to different Windows products.

To copy data

1. Within a worksheet, do one of the following:
   - In the table, select a cell whose value you want to copy.
   - To copy values from more than one cell, click the first cell, and then drag the mouse to select all cells you want to include.
2. Right-click and then select Copy. Or click Edit > Copy.

To paste data

1. Do one of the following:
   - In the table, select the cell into which you want to paste the data.
   - To paste values into more than one cell, select the upper left data cell of the block of cells into which you want to paste.
2. Right-click and then select Paste. Or click Edit > Paste.

See

Saving and Viewing Changes, page 4-3

Copying and Pasting to and from Microsoft Excel

You can copy and paste data from a worksheet to Excel and vice versa.

To copy and paste data to Excel

1. Within a worksheet, copy data as described in "Copying and Pasting Data."
2. Start Microsoft Excel, open a worksheet, and select a cell or block of cells.
3. Right-click and then select Paste.

To copy and paste data from Excel

1. Start Microsoft Excel and open a worksheet.
2. Select one or more cells.
3. Right-click and then select Copy.
4. In Oracle Demantra, select the cell or cells into which you want to paste the data.
5. Right-click and then select Paste. Or click Edit > Paste.

See also

Exporting Data to Microsoft Excel, page 4-6

Linking Data into Third-Party Reporting Tools (via DOL), page 4-7

Exporting Data to Microsoft Excel

You can export worksheet data to Excel. Your computer's regional settings can affect the results; see the note.

To export data to Excel

1. Within a worksheet, click File > Export. Or click the Export to Microsoft Excel button.

   An export dialog box appears.

2. Select Current Combination to export data currently displayed, or Entire Worksheet

to export all data from the worksheet.

3. Click OK.

   A Save page appears.

4. Define the location where the worksheet data will be saved and enter a name for the file.

5. Click Save.

Note

When receiving data from an external source, Microsoft Excel uses the Regional Options in the Windows Control Panel to determine whether a given cell should be formatted as Currency or General (as is or text). This means that if you export Oracle Demantra data that is formatted with a currency symbol, and if the Windows Control Panel uses a different currency symbol, those cells will appear in Excel as text values.

If you export to Excel and you receive text values where you wanted currency values, do the following:

1. Open the Windows Control Panel.

2. Double-click Regional and Language Options.

3. On the Regional Options tab, make sure that the Currency setting uses the same currency symbol as Oracle Demantra.

4. Export again from Oracle Demantra.

Later versions of Excel provide an option for converting problematic cells that it recognizes.

See

Copying and Pasting to and from Microsoft Excel, page 4-6

Linking Data into Third-Party Reporting Tools (via DOL), page 4-7

Linking Data into Third-Party Reporting Tools (via DOL)

When you work within a third-party reporting tool, you can import a Oracle Demantra worksheet via Oracle's Dynamic Open Link (DOL) technology. This technology lets you use any reporting tool that can connect to the Oracle Demantra database (which is either Oracle or SQL Server).

Oracle Demantra provides a web page (http://server name/virtual directory/portal/DOL_HTML.htm) to which you can link from your reporting tool, such as Microsoft Excel). Then to access the latest Oracle Demantra data, you can use the

refresh functionality within that reporting tool.

The following steps describe how to link Oracle Demantra data into Excel, as an example.

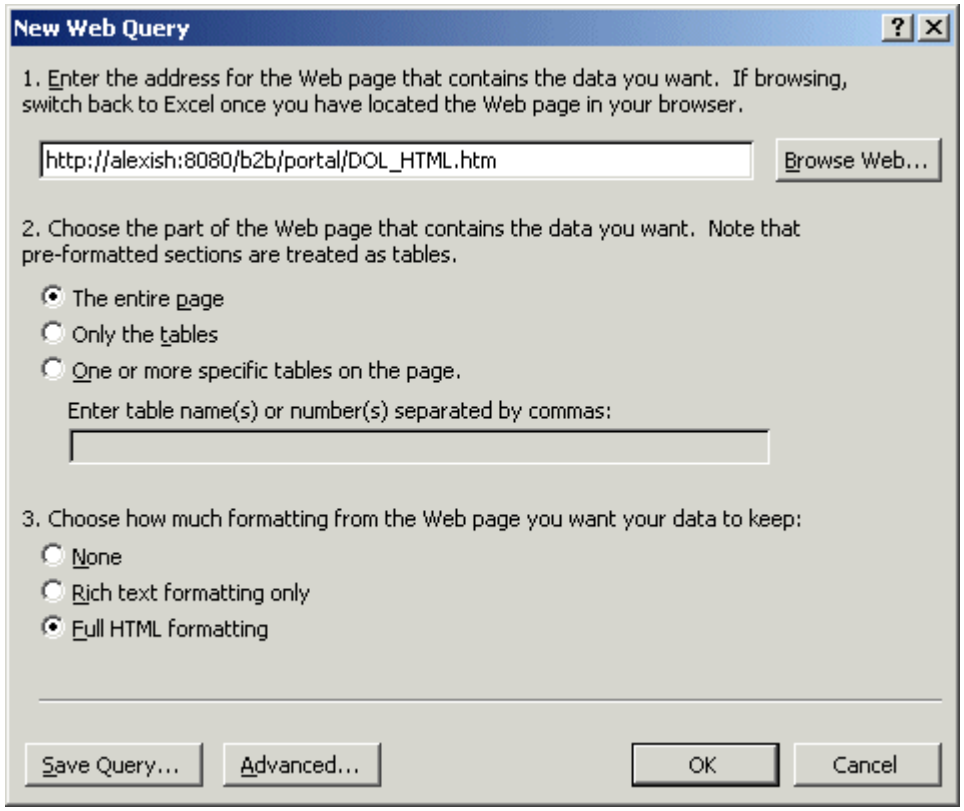
> **Note:** The details here may vary depending on the version of Excel. Consult the Excel documentation for information about "web queries."

To create a worksheet report in Excel

1. In Microsoft Excel, open the Data menu.

2. Click Get External Data and select New Web Query.

   The New Web Query screen appears.



3. Click Browse Web..., which displays a browser.

4. In the address bar, type the following URL and then click Go:

   http://*server name*/*virtual directory*/portal/DOL_HTML.htm

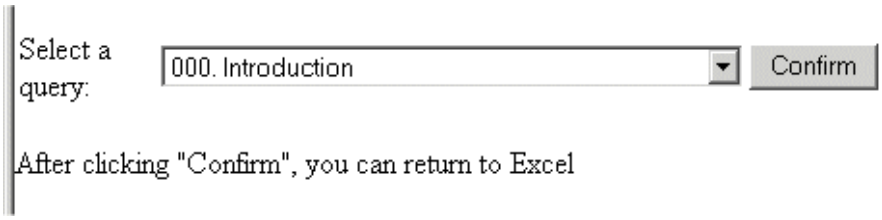
   For example:

http://frodo/demantra/portal/DOL_HTML.htm

A login page appears.

5. Type your Oracle Demantra user name and password and click Login.

   The browser now displays a list of worksheets.



6. Select a worksheet from the dropdown list and click Confirm.

   The worksheet opens in your browser in non-editable HTML format.

7. Optionally close the browser window.

8. Return to Excel, which is still displaying the same dialog box as before.

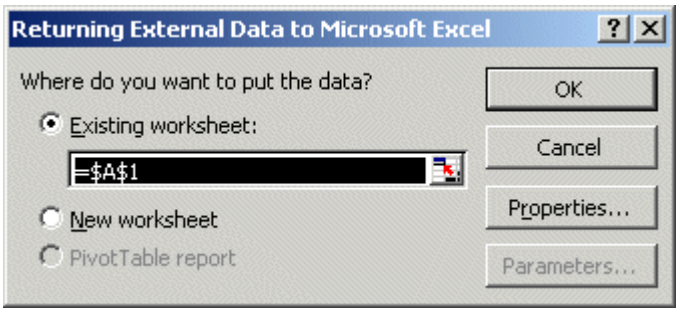
9. For step 2, select The entire page.

10. For step 3, select Full HTML formatting.

    Note: To save the query for repeat use, click Save Query...

11. Click OK.

    Excel asks where to put the data.



12. Make your choice and click OK.

    The Oracle Demantra worksheet opens in Excel.

See

Copying and Pasting to and from Microsoft Excel, page 4-6

Exporting Data to Microsoft Excel, page 4-6

Printing

To print the displayed data

1. Click File > Print. Or click the Print button on the toolbar.

   The Print Settings dialog box appears.

2. Select the required options.

Content selection	Specify whether to print the currently selected item-location combination, all combinations in the worksheet, or the screen.
Layout	Choose portrait or landscape orientation.
Paper	Choose a paper size.
Font	Choose a font size.
Object selection	If this worksheet includes a Gantt chart, this option lets you specify whether to include the Gantt chart in the printout.

3. If this worksheet includes a Gantt chart, optionally click the Gantt Settings tab. On this tab, specify which promotion attributes to include in the print-out.

4. Click OK.

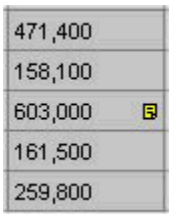
5. Oracle Demantra displays the normal system print dialog box, where you choose the printer to use, the number of copies to make, and so on.

6. Make selections as you would normally do.

7. Click OK.

Viewing Notes

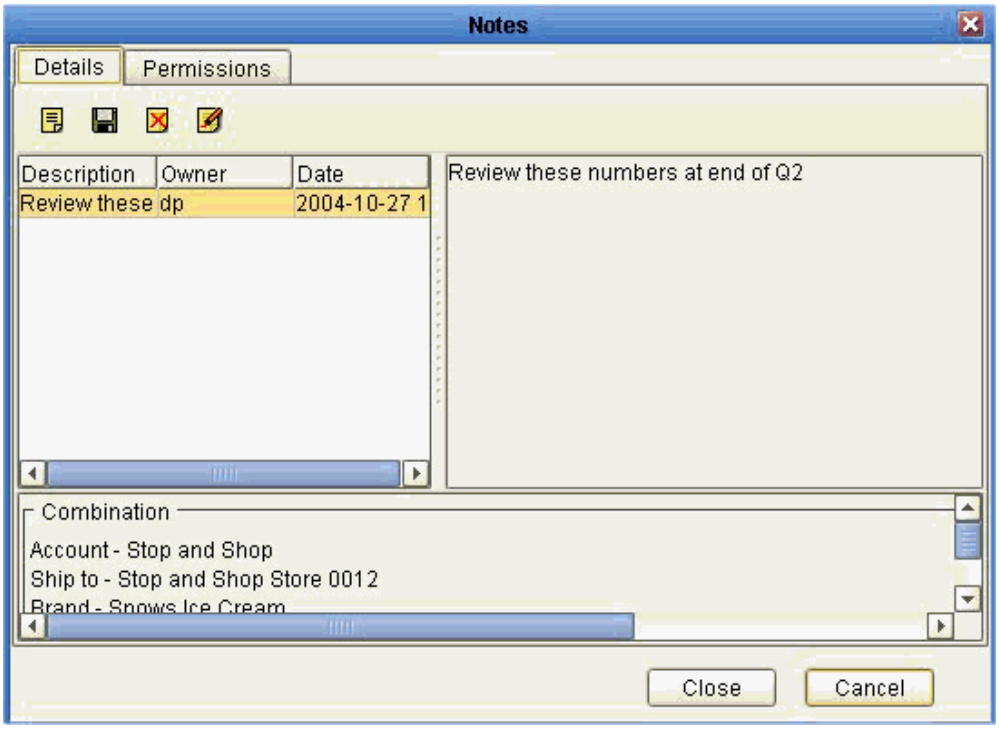
You can add notes to record comments and reminders. You attach the note to combination and date or dates. The worksheet table displays indicator symbols on those dates, generally in only some of the columns (depending on how your system is configured).



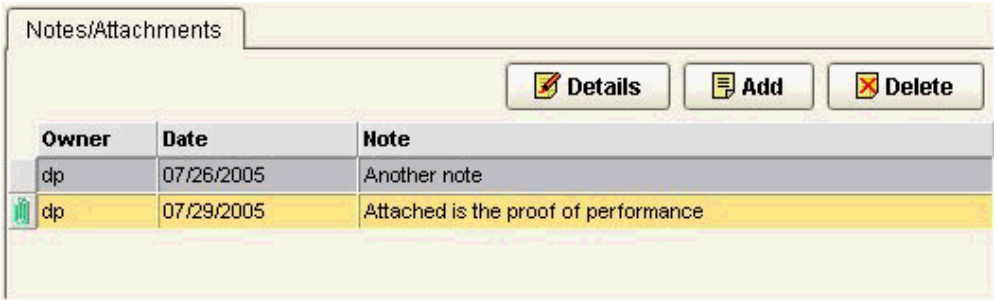
The graph displays an indicator as well.

You can see notes in two different areas:

- In the Notes dialog box.



- In the Notes/Attachments subtab, if this is included in your worksheet. This subtab also displays any associated attachments.



To open the Notes page

Do one of the following:

- In the table, right-click a cell and select Notes... The note will be associated with only this row.
- In the table, select one or more rows, right-click and then select Notes.... The note will be associated with each of the selected rows.
- In the table, double-click the left (non-scrolling) column. (Depending on how Oracle

Demantra is configured, this action may not bring up the Notes page.)

- In the graph, hold the mouse button over a point, right-click and then select Notes...

To display the Notes/Attachments subtab

See

- Specifying the Worksheet Elements in a View, page 13-24
- Editing Notes, page 4-13
- Viewing and Managing Attachments to Notes, page 4-14, and
- Specifying Note Permissions, page 4-16

Editing Notes

First display the Notes page or the Notes/Attachments subtab; see Viewing Notes, page 4-11. In the upper part of the worksheet, click the element to which you want to attach this note.

To add a note

1. If the Note box is gray (uneditable), click the Add button.
2. Type a note in the Note box.
3. If you are working in the Notes/Attachments subtab, you can optionally upload an attachment See Viewing and Managing Attachments to Notes, page 4-14.
4. Click the Save button.

To edit a note

1. Select a note and click the Edit button.
2. Type a note in the Note box.
3. If you are working in the Notes/Attachments subtab, you can optionally upload an attachment See Viewing and Managing Attachments to Notes, page 4-14.
4. Click the Save button.

To delete a note

1. Select a note and click the Delete button.

   The Confirm Delete message box appears.

2. Select one of the following:

   - Partial Deletion (deletes the note only from the current member and date)
   - Total Deletion (deletes the note from all members and dates)

3. Click OK.

4. Click Save.

See

- Viewing Notes, page 4-11
- Specifying Note Permissions, page 4-16

Viewing and Managing Attachments to Notes

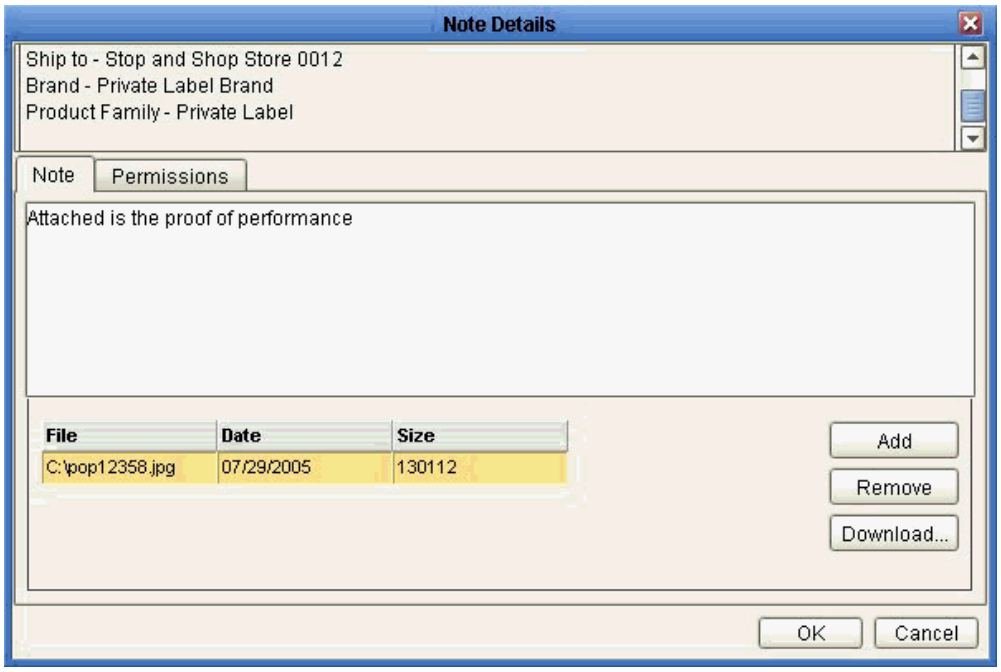
You can attach files to the notes, and Oracle Demantra uploads those files into the database (in compressed form). To view and manage attachments, you work in the Notes/Attachments subtab of your worksheet.

To add an noteattachment to a

1. Click the note.

2. Click Details.

   Oracle Demantra displays the Note Details screen.



3. Click Add.
4. Find the file that you want to attach and then click Open.

   Oracle Demantra uploads a compressed version of the file into the database.
5. Click OK.

To remove an attachment from a note

1. Click the note.
2. Click Details.

   Oracle Demantra displays the Note Details screen:
3. Click the row that lists the attachment and then click Remove.
4. Click OK.

To download an attachment

1. Click the note.
2. Click Details.

   Oracle Demantra displays the Note Details screen.

3. Click the row that lists the attachment and then click Download.
4. Specify the directory and filename for the downloaded file and then click Save.
5. Click OK.

See

- Viewing Notes, page 4-11
- Specifying the Worksheet Elements in a View, page 13-24

Specifying Note Permissions

In general, notes (and their optional attachments) can be viewed by other users. You can specify permissions for the notes, to determine who can read the note and what type of access they are permitted. You can specify permissions for groups or for specific users.

To specify permissions for a note and its attachments

1. On the Details tab, select the note.
2. Click the Permissions tab.
3. Select the User Permissions or Group Permissions tab.
4. For each user or group that should have non-default settings for this note, move that user or group from the left list to the right list (Selected Users or Selected Groups). Use any of the techniques in "Working with Lists."

   Note: Read-only is the default setting for non-selected users or groups.

5. Remove any unwanted users or groups from the right list.
6. Then for each user or group in the right list, do the following:
   1. Click the user or group.
   2. Select a setting from the Permission dropdown list at the bottom of the page. The following options are available:

Read and Write	Enables the user or group to read the notes list, edit notes, and add notes.

Read Only	Enables the user or group to read the notes list.
Not Visible	Makes the note list not visible to this user or group.
Full Control	Enables the user or group to read the notes list, edit notes, add notes, and delete notes.

7. Click Save.
8. Click Close.

Group and user permission priorities

- User permissions take precedence over permissions of any groups the user belongs to.
- If a user belongs to more than one group, the highest level of permissions from the associated groups will be granted.

See Viewing Notes, page 4-11.

Refreshing the Local Worksheet Cache

Depending on the definition of a worksheet, Oracle Demantra may store a local copy of the worksheet data on your machine, for faster performance. Also depending on the worksheet definition, the cache may be refreshed automatically or may require periodic refreshing by you.

To refresh your local worksheet cache

Click Data > Refresh worksheet data cache.

See

- Saving and Viewing Changes, page 4-3
- Configuring the Basics, page 13-4

Viewing the Audit Trail

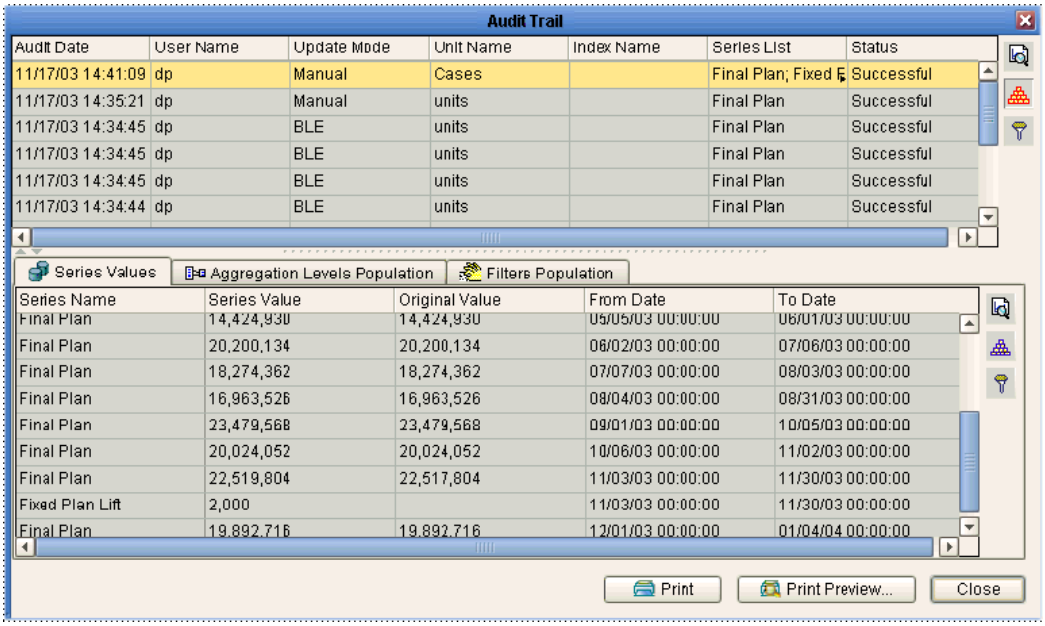
Oracle Demantra automatically records changes in an audit trail. The audit trail includes changes due to edits within worksheets, copy/paste actions, and changes caused by import, and so on.

Note: You can see only changes that were made by you or other users who are in the same collaboration groups as you.

Oracle Demantra provides two ways to view the audit trail:

- You can view the changes that have occurred to the item-location combination that is currently displayed in the worksheet.
- You can create and then execute a profile that specifies a wider set of data: multiple combinations, a wider span of time, and so on.

In either case, the audit trail looks like this:



The top part of the page lists the changes. When you select a row in this table, the bottom part of the page lists details corresponding to that row.

- The Series Values tab displays details on the series that were changed.
- The Aggregate Level Population tab displays the specific aggregation levels to which this change applies. The change could have occurred at a different aggregation level.
- The Filtered Population tab displays the filtering that was used at the time of this change.

Viewing the Audit Trail for a Specific Combination

To view the audit trail for a combination

1. In a given worksheet, select a combination.

2. Click Data > Audit Trail.

   If any changes have occurred to this combination, the Audit Trail screen appears, displaying a table with one row for each recorded change. The following information is displayed:

Audit Date	Date when change was made.
User Name	User who made the change
Update Mode	Indicates the type of change: Manual, BLE (Business Logic Engine) or Integration
Unit Name	Unit of measure that was used at the time of the change
Index Name	Index that was used at the time of the change
Series List	Series affected by the change
Status	In Progress, Fail, or Success

3. To see specific details on this change, click a change in this table and then click the Series Values tab.

   This tab displays the following information:

Series Name	Name of the series that was changed.
Series Value	New value used in this series.
Original Value	Original value in this series.
From Date	First date in the series when the change occurs.
To Date	Last date in the series when the change occurs.

4. To see the specific aggregation levels to which this change applies, click the Aggregate Level Population tab. The change could have occurred at a different aggregation level.

5. To see the filtering that was used at the time of this change, click the Filtered Population tab.

Viewing the Audit Trail for Other Data

An audit trail profile enables you to select a specific portion of the audit trail so that you can view changes that affect more than one combination.

To create or modify an audit trail profile

1. Click File > Audit Trail.

2. Then:

   - To create a new profile, click New.

   - To modify a profile, click an audit trail profile name and click Modify.

   The wizard displays a properties screen.

3. In the Name and Description fields, type a name and optional description.

4. If you want to share this audit trail profile with others, click Public.

5. Click Next.

   The wizard prompts you for information about the changes you want to see.

6. For Source Type, select the check box for each type of change you want to see. Here, BLE represents the Business Logic Engine.

7. For each user whose changes you want to see, move the name from Available Users to Selected Users.

8. Click Next.

   The wizard prompts you for the range of time you are interested in.

9. For Time Filter, select Relative or Fixed, depending on whether you want to define a window of time relative to today.

10. For From Date and To Date, specify a range of dates.

11. Click Next.

The wizard prompts you to specify the aggregation levels you are interested in.

12. For each aggregation level that you are interested in, move that level from Available Filter Levels to Selected Filter Levels.

13. Click Next.

    The wizard prompts you to specify the series you are interested in.

14. For each series that you are interested in, move that series from Available Series to Selected Series.

15. Click OK.

16. Click Close to exit the wizard.

To use an audit trail profile

1. Click File > Audit Trail.

2. Click an audit trail profile.

3. Click Execute.

   Oracle Demantra displays the specified part of the audit trail. See Viewing the Audit Trail, page 4-17.

To delete an audit trail profile

1. Click File > Audit Trail.

2. Click an audit trail profile.

3. Click Delete.

4. Click Yes.

5

Managing the Screen

This chapter covers the following topics:

- Managing Multiple Worksheets
- Managing Worksheet Views
- Managing View Elements
- Changing the Graph Style
- Managing Empty Rows
- Worksheet, Layout, and Data
- Worksheet Definition, Layout, and Local Adjustments

Managing Multiple Worksheets

Within Oracle Demantra, you can open multiple worksheets and display them in tab mode or window mode. In window mode, you can resize, position, minimize, maximize, and tile each window as in other software.

To specify how to display worksheets

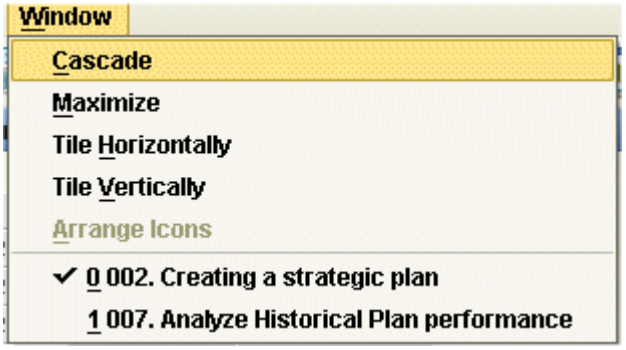
Do one of the following:

- Select Options > Tabs View/Windows View.
- Click the Tabs/Windows toggle button.
  - display worksheets as windows
  - display worksheets as tabs

A worksheet contains views, and these views can be displayed as windows or tabs within the worksheet itself. The Tabs/Windows setting discussed here has no effect on the views.

To view a worksheet that has already been opened

1. In windows view, select the worksheet from the Windows menu.



2. In tabs view, click the tab corresponding to the worksheet.

To close a worksheet

Do one of the following:

- In windows view, click close (X) in the top right corner of the worksheet window.
- In tabs view, click the close symbol (X) on the tab.

See

- Managing Worksheet Views, page 5-2
- Managing View Elements, page 5-3
- Adding and Managing Worksheet Views, page 13-22, and
- Creating or Editing a Worksheet or Content Pane, page 13-3.

Managing Worksheet Views

A worksheet can include multiple *views*, which are displayed as tabs or as windows

within the worksheet window itself.

Each view can have a different set of series and a different layout. Within any given worksheet, you can display the views as tabs or as child windows that you can re-size and reposition.

Depending on the worksheet definition, the views may or may not be synchronized with each other. If they are synchronized, when you edit in one view, that change automatically appears in the other views.

> **Note:** In a given worksheet, if some of the views show data at a higher aggregation level, the data is not editable in those views.

To manage worksheet views

Within any given worksheet, you can display the worksheet views as tabs or as child windows that you can resize and reposition.

- To create, modify, or delete worksheet views, see Adding and Managing Worksheet Views, page 13-22.
- To change how views are shown within the current worksheet, click Options > Tabs Multiview or Options > MDI Multiview, whichever option is displayed. Or click the corresponding toggle button on the toolbar.
  - display views as child windows
  - display views as tabs
- If you are currently displaying views as tabs, you can view one tab at a time. Click the tab of the view you want to view.
- When you are displaying views as subwindows, you can resize, reposition, maximize, and minimize each of these subwindows. Also, the Options menu provides options for tiling and cascading the subwindows.

See

- Managing Multiple Worksheets, page 5-1
- Managing View Elements, page 5-3

Managing View Elements

To hide or re-display elements of a worksheet view

You can hide elements of a worksheet. To do so, use the Options menu. For example, to

hide the graph, click View > Show/Hide Graph.

> **Note:** This menu includes an option to hide the time axis. You typically use this option only if the worksheet also contains time levels. In such a case, it is desirable to hide the time axis, because it is redundant and takes up space on the screen.

Each of these menu items acts as a toggle. To redisplay what you have hidden, click the same menu item again.

To re-size an area in a worksheet view

Drag a divider to the required position.

To expand or contract an area in a worksheet view

There are two snap buttons in the upper left of each worksheet area, one with an up arrow and one with a down arrow. Click the snap button pointing in the required direction.

To re-size a data column

Click the vertical divider between two column headers, and drag it horizontally to the required position.

See

- Managing Multiple Worksheets, page 5-1
- Managing Worksheet Views, page 5-2
- Adding and Managing Worksheet Views, page 13-22

Changing the Graph Style

To change the style of the graph

Click any of the graph style buttons to the left of the graph.

To display only one pie chart

Click View > Show Multiple Pie Charts. This option is a toggle. If you click it again, you redisplay the other pie charts.

Managing Empty Rows

To hide or display empty rows in the worksheet table

Click View >Hide Empty Rows. This option is a toggle. If you click it again, you redisplay the empty rows.

Note: This option does not affect any graphs in the worksheet.

Examples

In some cases, some of the rows of a worksheet table might not contain data, for example:

Cookies - Low Fat

Account	Time	Revenue $	Market Plan $
BJ	03/10/2003	$1,243,435	$1,257,652
	06/09/2003	$1,488,018	$1,771,360
	09/08/2003	$740,175	$901,146
	12/08/2003	$1,031,035	$7,247,500
	03/08/2004	$816,591	$850,507
	Summary	$5,319,254	$12,028,165
Rainbow Company	03/10/2003		$658,800
	06/09/2003		
	09/08/2003		
	12/08/2003		
	03/08/2004		
	Summary		$658,800
Summary		$5,319,254	$12,686,965

Empty Rows Shown | Row: 9, Col: 5

Note that the status bar at the bottom of worksheet indicates that empty rows are currently being displayed.

When you hide empty rows, the result is as follows:

Cookies - Low Fat

Account	Time	Revenue $	Market Plan $
BJ	03/10/2003	$1,243,435	$1,257,652
	06/09/2003	$1,488,018	$1,771,360
	09/08/2003	$740,175	$901,146
	12/08/2003	$1,031,035	$7,247,500
	03/08/2004	$816,591	$850,507
	Summary	$5,319,254	$12,028,165
Rainbow Company	03/10/2003		$658,800
	06/09/2003		
	09/08/2003		
	12/08/2003		
	03/08/2004		
	Summary		$658,800
Summary		$5,319,254	$12,686,965

Empty Rows Shown | Row: 9, Col: 5

Worksheet, Layout, and Data

As you work within Oracle Demantra, it is important to remember that worksheets are different from the data in them. For example, the definition of a worksheet specifies which series to display and how to aggregate those series for that worksheet. But the worksheet definition does not specify the values that the series contain.

Accordingly, the worksheets and their layouts are saved separately from changes to the data.

- To save changes that you have made to the data in the worksheet, including changes to notes, click Data > Save Data. Or click the Save Data button.
- To save changes that you have made to the worksheet definition or to the local layout, click File > Save Worksheet. Or click the Save Worksheet button.
  - If you own the worksheet, this option saves the basic worksheet definition and its initial layout. This affects any users of this worksheet who have not yet saved their own layout for it.
  - If you do not own the worksheet, this option saves only your own layout of the worksheet. This has no effect on any other users.

See

Worksheet Definition, Layout, and Local Adjustments, page 5-7

Saving and Viewing Changes, page 4-3

Worksheet Definition, Layout, and Local Adjustments

As you work with a Oracle Demantra worksheet, you often sort columns, hide or display features, and make various other changes. It is useful to understand how these settings are saved.

Base Oracle Demantra configuration These settings affect all users and all worksheets.	• Display format for each series • Initial display width of series and levels • Colors and graph style for each series • Other display colors (generally dependent on a condition)
Worksheet definition These settings are saved via the File > Save Worksheet menu option. Only the worksheet owner can make these changes.	• Initial number of views within the worksheet and their initial names • Initial elements (Members Browser, table, graph, and so on) in worksheet view • View synchronization setting • Aggregation levels used in worksheet and *initial* level layout; advanced selection options • Series used in worksheet and *initial* series layout • Time aggregation; time span; time formatting • Filtering and exception filtering • Unit of measure used in worksheet; overall scale used in worksheet, if any; index or exchange rate, if any

Layout changes These settings are saved separately for each user if the user clicks File > Save Worksheet. Any user can save these changes, not just the worksheet owner.	• Additional views in the worksheet • New names of worksheet views • *Level layout*: order of levels; placement on axes in each view; whether level is hidden in each view • *Series layout*: order of series; where each series is displayed (table, graph, both) • Hide/show time axis
Local adjustments These settings are saved automatically separately for each worksheet and each user.	• Use of windows or tabs for views within a worksheet • Size and position of the Members Browser, table, graph, and so on in each view • Sorting in the worksheet table • Graph type; legend; grid lines • Hide/show empty rows setting • Activity synchronization setting (Options menu)
Not saved	• Changes to column widths in the worksheet table • Initial view focus; focus in each worksheet view • Expansion state in the Members Browser and Activity Browser • Focus and scroll in all areas • Zoom setting in Gantt

The autorun option (Options menu) is saved separately for each user, but applies to all worksheets that the user sees.

Part 2

PTP and PMO Business Processes

6

Oracle Demantra Dashboard

This chapter covers the following topics:

- Introduction to the Dashboard
- Reviewing Metrics
- Reviewing the Planning Hierarchy
- Editing Retailer Information
- Opening Worksheets
- Managing Tasks
- Creating and Sending a Task
- Personalizing the Dashboard
- Configuring Your Default Layout
- Configuring My Tasks
- Configuring My Worksheets

Introduction to the Dashboard

This chapter introduces the Oracle dashboard: Collaborator Workbench.

Oracle's Collaborator Workbench is the starting point for PTP. This dashboard is designed for use by sales managers. You log into the application and immediately have access to a number of key performance indicators (KPIs). You can also jump directly to TPMO worksheets, which are working environments that support specific business processes; these are described in the following chapters.

To log into the dashboard

1. In Windows, click Start and click Programs.

2. Click Demantra > Demantra Spectrum release > Collaborator Workbench.

3. In the Log On dialog box, enter your user name and password.

4. Click Login.

5. If the toolbar includes a link labeled Click here to install Java Web Start, click that link.

   Next Oracle Demantra prompts you to install JRE.

6. When you are prompted to install JRE, do so. Choose the Typical installation and accept all the default values, unless otherwise advised by your system administrators.

   After you install this software, Collaborator Workbench comes up, displaying your personal page.

At this point, Oracle Demantra might display a dialog box that asks if you want to trust the signed application distributed by Oracle.

> **Note:** In some cases, you do not see this dialog box until you click a worksheet name.

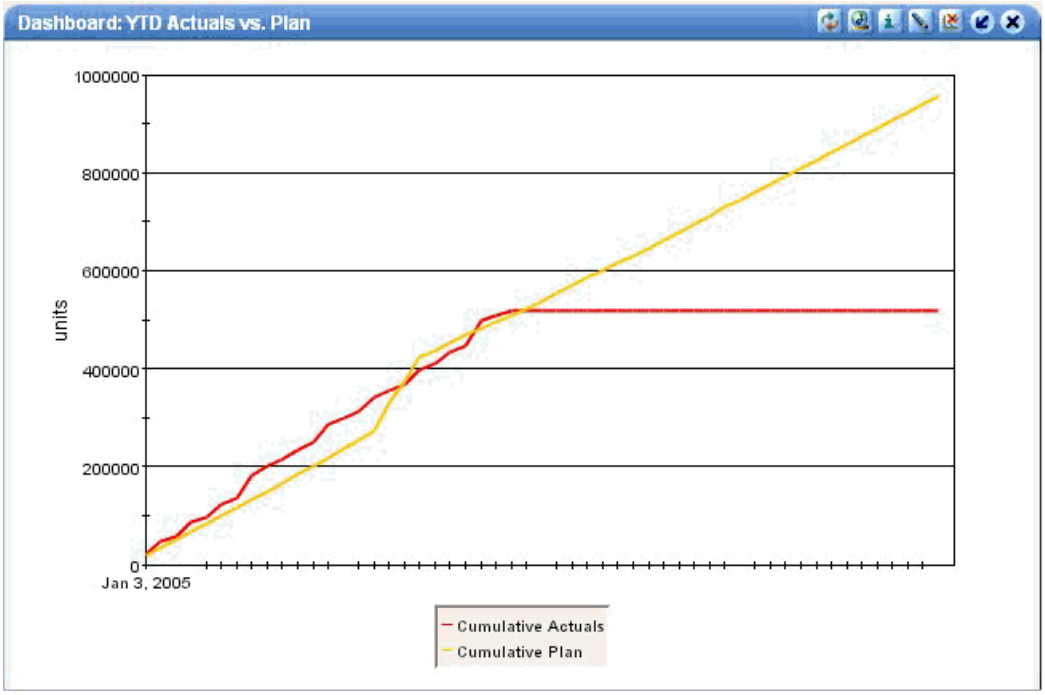
7. Click Yes (or Always) or Start.

Reviewing Metrics

Collaborator Workbench displays summary panes that display critical information and which you can customize to your needs. Initially, it displays the following summary panes.

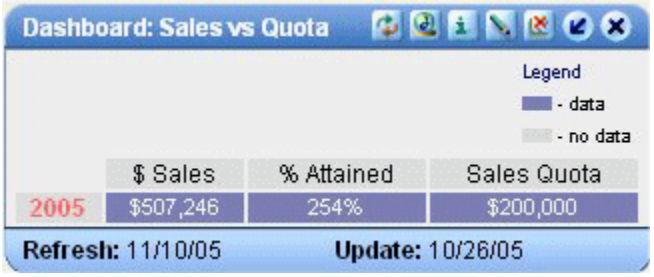
Actuals versus Plan

This summary pane is a graph that shows cumulative actual volume and planned volume.



Sales versus Quota

This summary pane shows current sales compared to the sales quota.

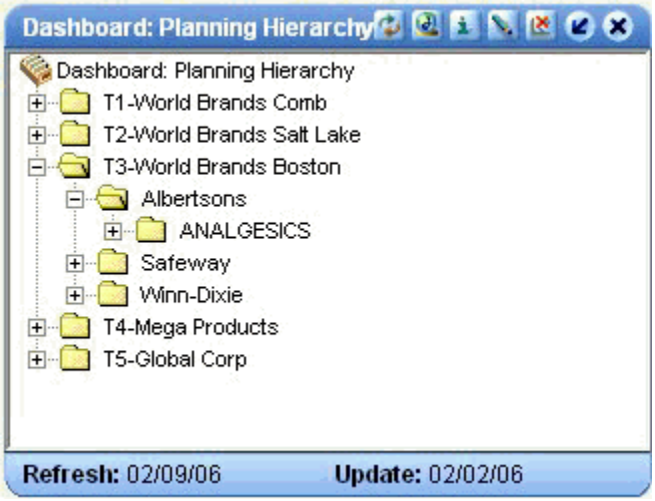


Volume Breakdown

This summary pane displays a table that shows the breakdown of volume into base volume and incremental volume.

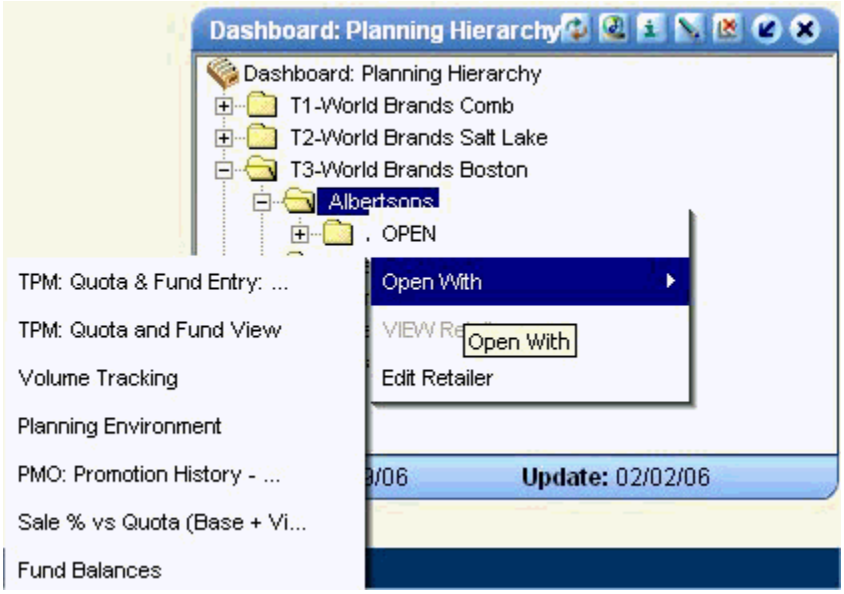
Reviewing the Planning Hierarchy

The Planning Hierarchy is an expandable, treelike view that you can use to navigate the planning hierarchy.



Expand the hierarchy as needed.

You can right-click for more options.



In particular, you can open worksheets that are filtered to the selected retailer (for example). In the case of retailers, you can also view or edit properties of the retailer such as minimum event margin.

Editing Retailer Information

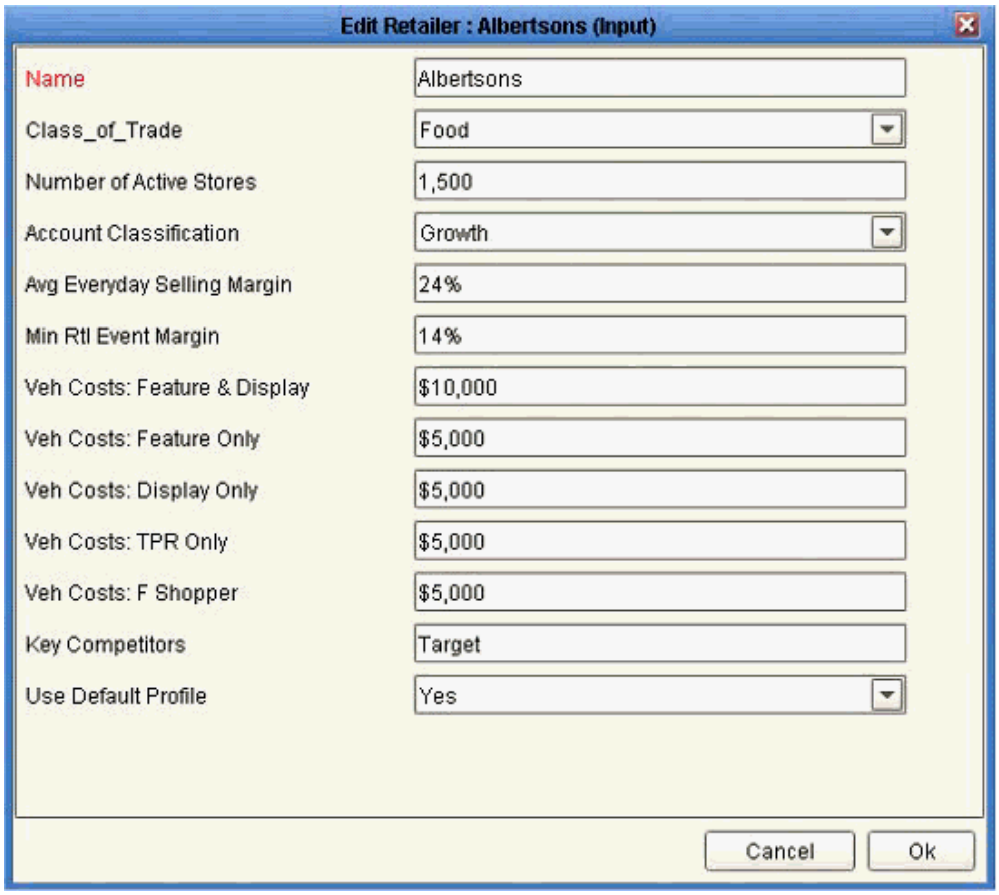
PTP stores basic retailer details so that when you create a promotion, it is automatically specified appropriately for that particular retailer. PTP provides default settings that you can use for any retailer.

Setting a Retailer Profile to the Default

To set a retailer profile to the default settings

1. In the Planning Hierarchy, expand the tree display to the retailer level.
2. Right-click the retailer and click Edit Retailer.

   PTP displays the Edit Retailer screen.



3. Change Use Default Profile to Yes.

   Caution: Do this only if you are certain that you want to change all settings for this retailer.

4. Click OK.

5. Log into the Workflow Manager and run the CopyRetailerDefaults workflow; see Administration - Running Required Workflows, page 14-2.

This workflow checks for any retailers that have been set to use the default profile, and it copies the default details to those retailers.

Editing a Retailer Profile

To edit a retailer profile

1. In the Planning Hierarchy, expand the tree display to the retailer level.

2. Right-click the retailer and click Edit Retailer.

   PTP displays the Edit Retailer screen, as shown in the previous procedure.

3. Set Use Default Profile to No.

   > **Caution:** If you do not set Use Default Profile to No, your changes will be reset to the default.

4. Enter values for the other attributes as follows:

Name	Name of the retailer.
Class_of_Trade	Dropdown list with the following choices: • Food • Drug • Mass • C-Store • Military
Number of Active Stores	Number of active stores that this retailer operates.
Account Classification	Dropdown list with the following choices: • Growth • Holding • Declining
Avg Everyday Selling Margin	Average selling margin, disregarding promotions.
Min Rtl Event Margin	Minimum margin that this retailer must make on an event. Promotion Optimization considers only events that provide at least this much margin.
Veh Costs: Feature & Display	Default cost for an event of type F&D for this retailer.
Veh Costs: Feature Only	Default cost for an event of type Feature for this retailer.

Veh Costs: Display Only	Default cost for an event of type Display for this retailer.
Veh Costs: TPR Only	Default cost for an event of type TPR for this retailer.
Veh Costs: F Shopper	Default cost for an event of type F. Shopper for this retailer.
Key Competitors	A text field where you can list the key competitors of this retailer.

5. Click OK.

Opening Worksheets

Each worksheet is a working environment designed for specific PTP and PMO business processes.

To open worksheets, click My Worksheets, or right-click Planning Hierarchy, or right click an open worksheet.

To open a worksheet

- To open an unfiltered worksheet, click a worksheet listed in My Worksheets.
- To open a worksheet that is filtered to a specific context, right-click a promotion, scenario, retailer, or territory, click Open With, and then click the worksheet name. You can do this within the Planning Hierarchy or within an open worksheet.

  When you open a worksheet this way, it is filtered to show just the object from which you launched it. Notice that the name of the object is added to the beginning of the worksheet title.

  > **Note:** When you first open a worksheet, Oracle Demantra might display a dialog box that asks if you want to trust the signed application distributed by Oracle.
  >
  > Click Yes (or Always) or Start.

See

- Configuring My Worksheets, page 6-15
- Creating and Sending a Task, page 6-10

Managing Tasks

My Tasks lists all tasks that are assigned to you and that you have not yet addressed. For example, if you are a manager, you will receive promotions that require approval.

> **Note:** If a due date is shown in red text, that means the response period has nearly ended and the task is going to time out fairly soon.

To view all assigned tasks

If you have many open tasks, the My Tasks module does not necessarily display all of them. To check for additional tasks:

Click the More link in the bottom right corner of My Tasks.

My Tasks fills the wide pane and shows all current tasks.

To mark a task as done

Before you mark a task as done, make sure that you have reviewed all the relevant information and that you have addressed any concerns or issues. Then do the following:

1. First:
   - Select the appropriate response from the dropdown list in the Select value column. The check box next to the task is automatically selected.
   - If there is no dropdown list, just select the check box to the left of the task.
2. Click the Save & Refresh link at the bottom of the task list.

   The task is removed from My Tasks and the updated task list is shown.

   > **Caution:** If you go to another page or log off without clicking Save & Refresh, then your changes will be lost.

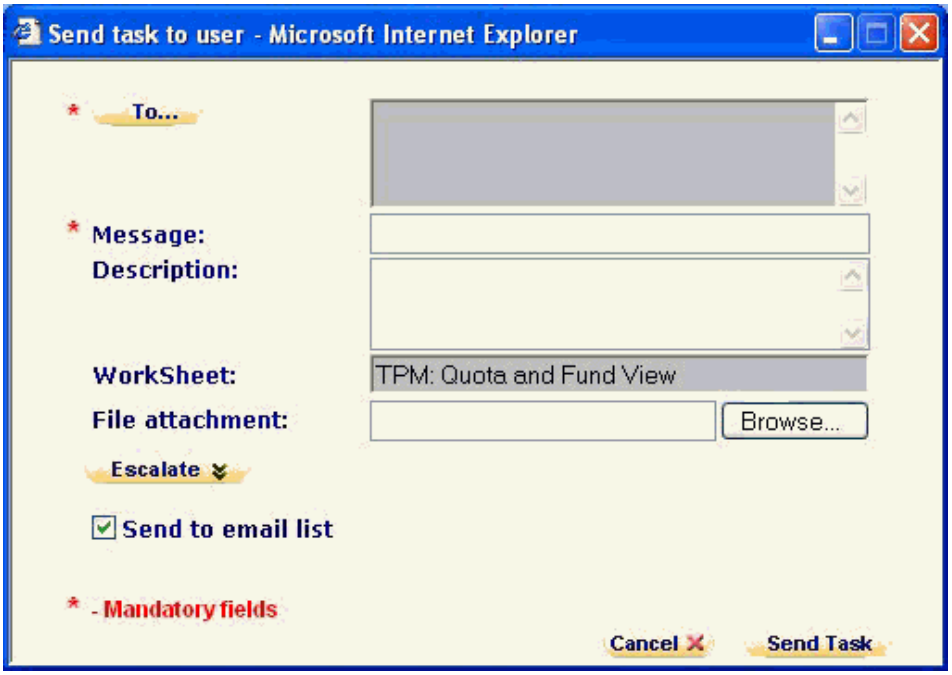
Creating and Sending a Task

To create and send a task

1. Start by doing one of the following:
   - Within My Worksheets, click Send on the worksheet that you want to send.

- Within My Tasks, click Create Task.

  The Send Task to User dialog box appears.



2. Click To..... and select the users or groups to receive the task.

3. In the Message field, type a short text message.

   This will be the task message that the recipient sees. The worksheet that you are sending will be added automatically as a link from the Message text.

4. In the Description field, type a short description.

   This description will be displayed below the task message in the recipient's My Tasks module.

5. To link the task subject line to a Web page, enter the full path to the file in URL field.

   Note: You must enter the full URL, including server name and directory hierarchy. The http:// part will be added automatically if omitted.

6. To attach a file to the task, enter the path to the file in the File Attachment field or use the Browse button to find it.

7. To ensure that this task is completed by a specific time, click Escalate and then

provide the following information:

Due Date	Date and time by which this task must be completed
Alert Time	Date and time at which an alert will be displayed
To	Additional email addresses

8. To send an email notification to the recipient of the task, select the Send email list check box. (Depending on how your system has been configured, this option may not be available.)

9. Click Send Task.

When the recipient next logs in (or refreshes My Tasks), he or she will see the new task.

Personalizing the Dashboard

You can personalize Collaborator Workbench in several different ways:

- Configuring Your Default Layout, page 6-12
- Configuring My Tasks, page 6-14
- Configuring My Worksheets, page 6-15

To add new summary panes, see Creating or Editing a Worksheet or Content Pane, page 13-3.

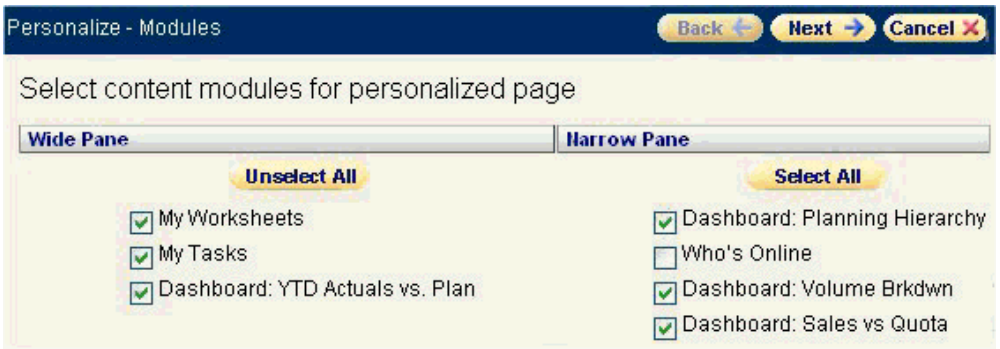
Configuring Your Default Layout

The Collaborator Workbench page includes a wide pane and a narrow pane, and each pane has a possible set of modules that it can display. You choose the modules and their display order, top to bottom.

To personalize your default layout

1. Click the Personalize link.

   The Personalize - Modules page appears. This page contains two lists: one for items that can be displayed in the wide pane and one for items that can be displayed in the narrow pane.

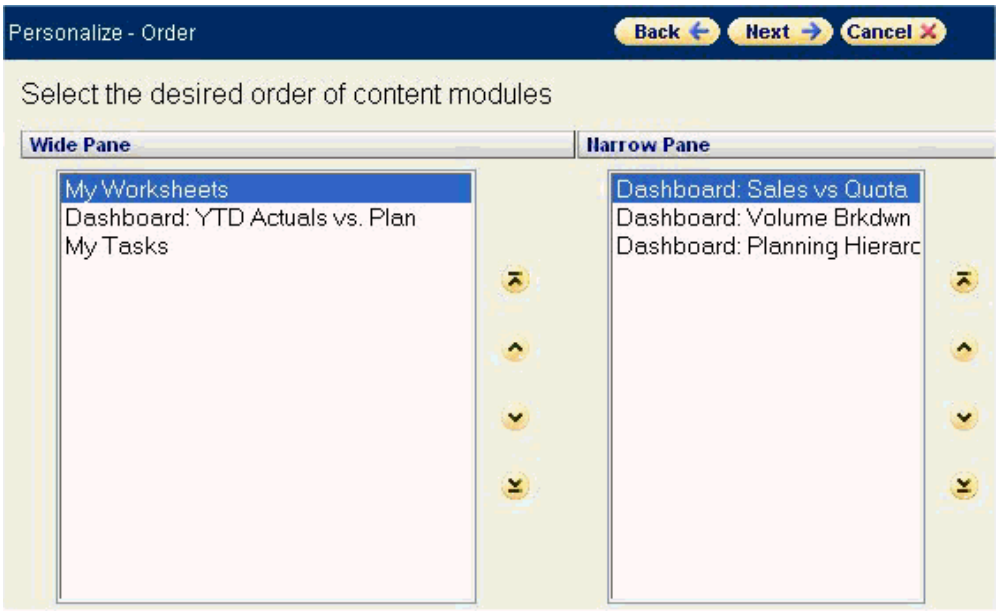


These lists include the following:

- My Tasks and My Worksheets, which can be displayed only in the wide pane.
- Who's Online, which can be displayed only in the narrow pane.
- Worksheets that have been defined as content and to which you have access.

2. In each list, use the check boxes to select or clear the modules that you want to see.
3. Click Next.

   The Personalize - Order page appears. Like the previous page, this page has one list for the wide pane and one for the narrow pane.



4. Select a module and then click the up or down buttons to change its position in the list.

   The order here is the order in which these modules are shown in Collaborator Workbench.

5. Click Next.

   The next page summarizes your choices. You can return to the previous pages to make further alterations.

6. Click Finish to save your changes. Or click Back to go back to the previous pages.

Configuring My Tasks

To configure My Tasks

1. If Collaborator Workbench is not currently displaying My Tasks, then display it as described in "Configuring Your Default Layout".

2. In My Tasks module, click the personalize button in the upper right corner of the pane.

   Collaborator Workbench displays a page like the following:

3. In the Number of Tasks to View field, type the maximum number of tasks that you want to see in My Tasks.

4. From the Order Tasks by list, select the field that you want to list the tasks by.

5. From the Sort dropdown menu, select the sorting order that you want for the tasks. Task fields can be listed in either ascending or descending order.

6. Click Finish.

   My Collaborator Workbench refreshes with My Tasks in the new configuration.

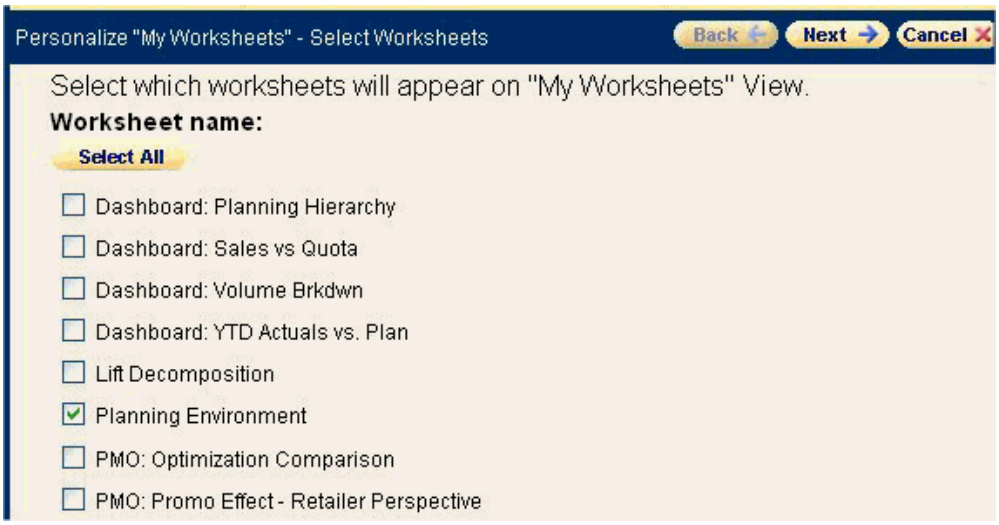
Configuring My Worksheets

To configure My Worksheets

1. If Collaborator Workbench is not currently displaying My Worksheets, then display it as described in "Configuring Your Default Layout".

2. In My Worksheets module, click the personalize button in the upper right corner.

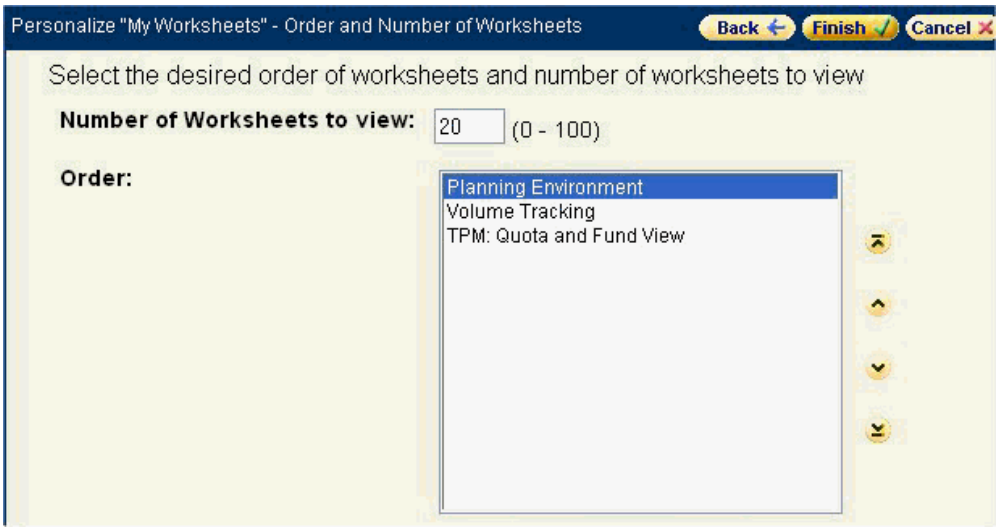
   Collaborator Workbench displays a list of all available worksheets. This includes all worksheets you own and all public worksheets.



3. Select the check box next to worksheet that you want to display.

4. Click Next.

   Collaborator Workbench displays a new page where you specify how many worksheets to display and the display order for the worksheets you have selected.



5. In the Number of Worksheets to View field, type the maximum number of worksheets that you want to see in My Worksheets.

6. In the Order list, click a worksheet and then click the up or down arrows to specify the display order of that worksheet. Repeat as necessary.

7. Click Finish to save your changes.

7

PTP: Managing and Viewing Quotas and Funds

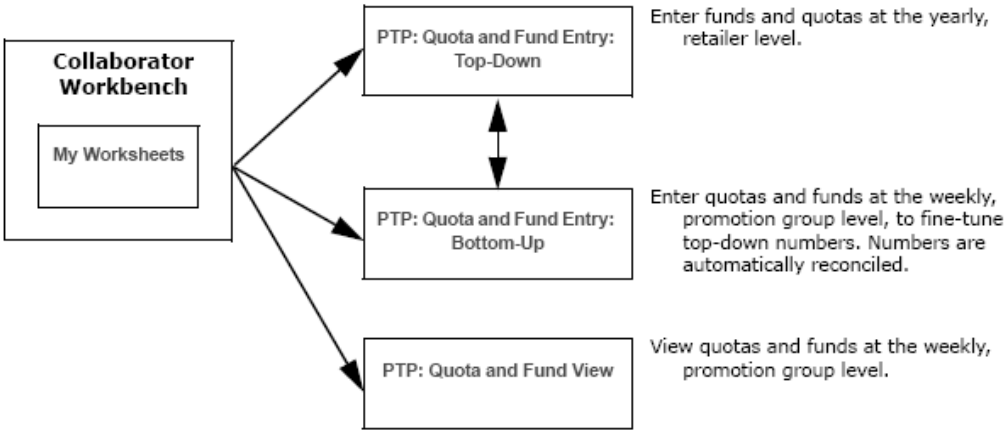
This chapter covers the following topics:

- Overview
- Managing Quotas and Funds at the Retailer Level
- Managing Quotas and Funds at the Promotion Group Level
- Viewing Quotas and Funds
- Reference

Overview

This chapter describes how to manage or view quotas and funds in Oracle Demantra, as part of the PTP business process.

To manage or view quotas and funds, you start in the Collaborator Workbench and launch any of the relevant PTP worksheets.



About Quotas and Funds

Oracle Demantra displays a standard set of promotion funds, which you can view or modify at several different levels, as appropriate, along with the quota (Sales Quota) that they are intended to support.

Available Funds

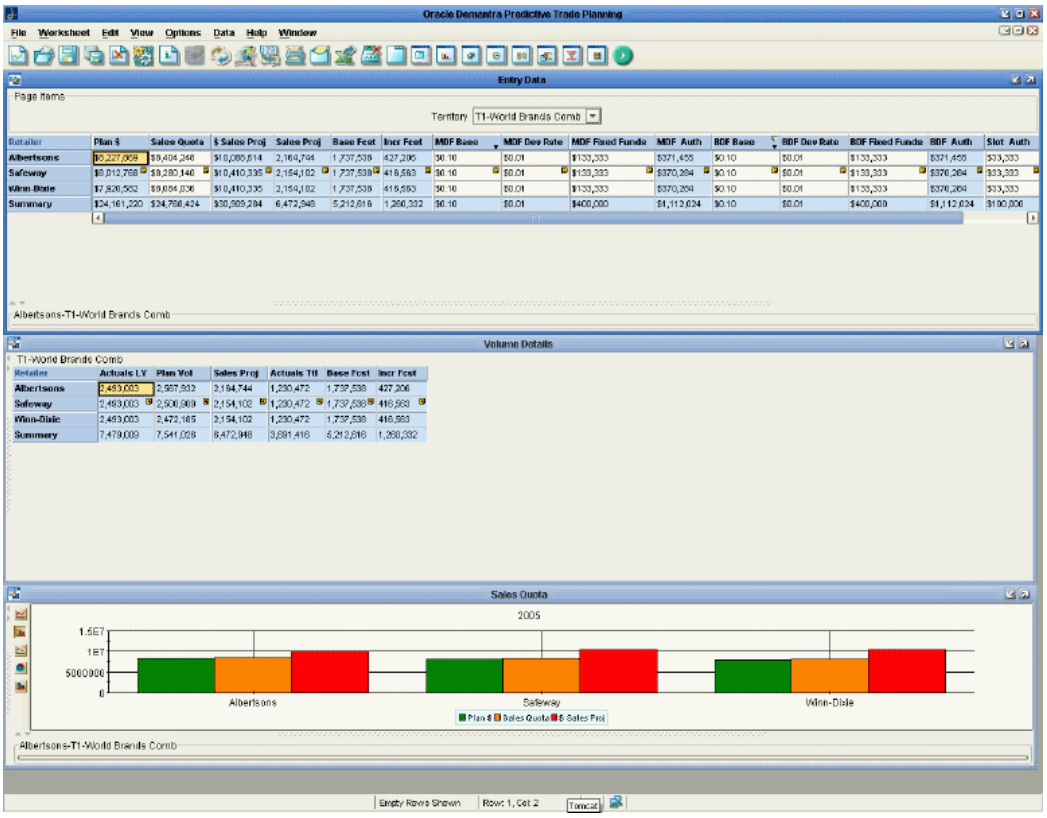
PTP provides the following standard set of promotion funds, broken out as follows:

- Brand Development Funds (BDF): Base rate (BDF Base Rate), development rate (BDF Dev Rate), and fixed funds (BDF Fixed Funds). The total of BDF funds is shown as BDF Auth.
- Market Development Funds (MDF): Base rate (MDF Base Rate), development rate (MDF Dev Rate), and fixed funds (MDF Fixed Funds). The total of MDF funds is shown as MDF Auth.
- Slotting funds (Slot Auth)
- In summary, the total authorized funding (BDF, MDF, and slotting) is shown as Ttl Fund Auth.

As in standard usage, the rates are per unit so that the authorized funding is the volume multiplied by the rate. For example, BDF Auth is computed as follows:

(BDF Base Rate + BDF Dev Rate) * volume + BDF Fixed Funds

You can see or edit these funds on several worksheets. One example (PTP: Quota and Fund Entry: Top-Down) is shown below.



Volume

Because volume affects the use of the funds, PTP also displays the following volume information:

- Actuals Ttl (the past volume)
- Volume Base (the base volume, in the absence of any promotions)
- Uplift (additional volume due to planned promotions)

In general, PTP volume calculations use actuals for the past and forecasted volume for the future. This means that to compute volume as needed for total BDF funds for the year, for example, PTP combines the actuals and the forecast.

Unplanned promotions do not affect volume.

Managing Quotas and Funds at the Retailer Level

Typically, you would start by working top-down, setting quotas and funds at the retailer-territory level.

To manage quotas and funds at the retailer-territory level

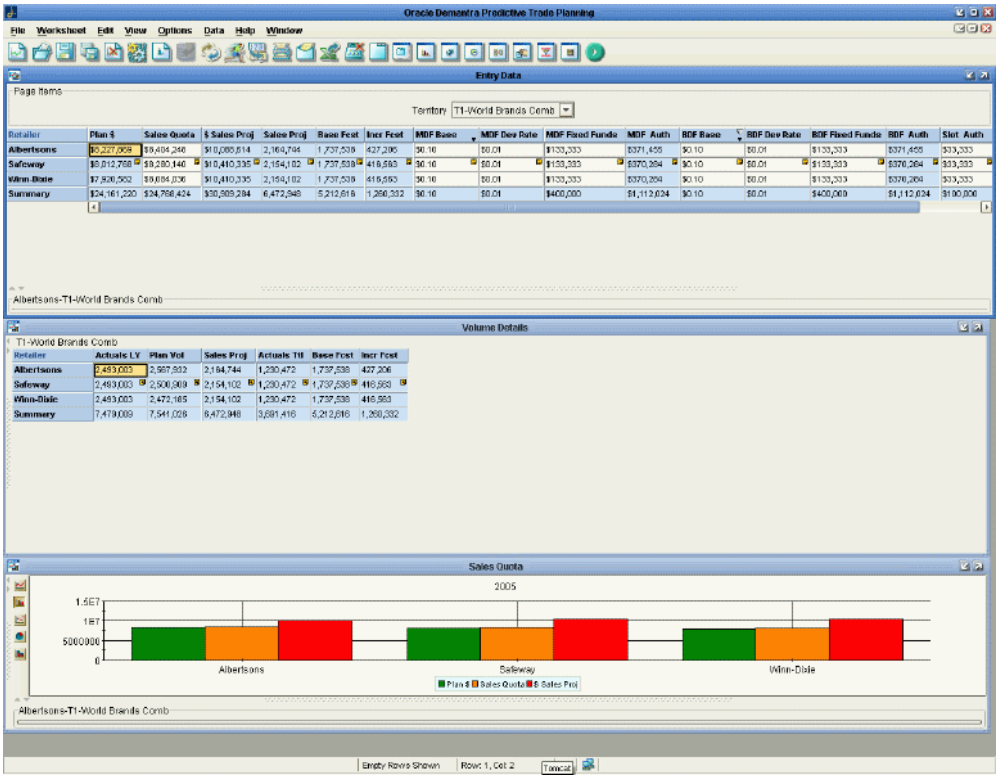
1. Start in Collaborator Workbench.

2. In My Worksheets, click PTP: Quota and Fund Entry: Top-Down.

   Or if a worksheet is currently open, click File > Open. Click PTP: Quota and Fund Entry: Top-Down and then click Open.

3. If the worksheet does not show data immediately, click Data > Rerun. Or click the Run button.

4. At the top of the screen, select the territory to display.



5. In the Entry Data table, edit the quota and fund values as needed. Here you are editing values for the entire year, for a given retailer.

6. Click Data > Save Data. Or click the Save Data button.

Entry Data

Here you enter the funds and quotas. This table shows all the quotas and funds for each retailer, aggregated over the year.

Volume Details

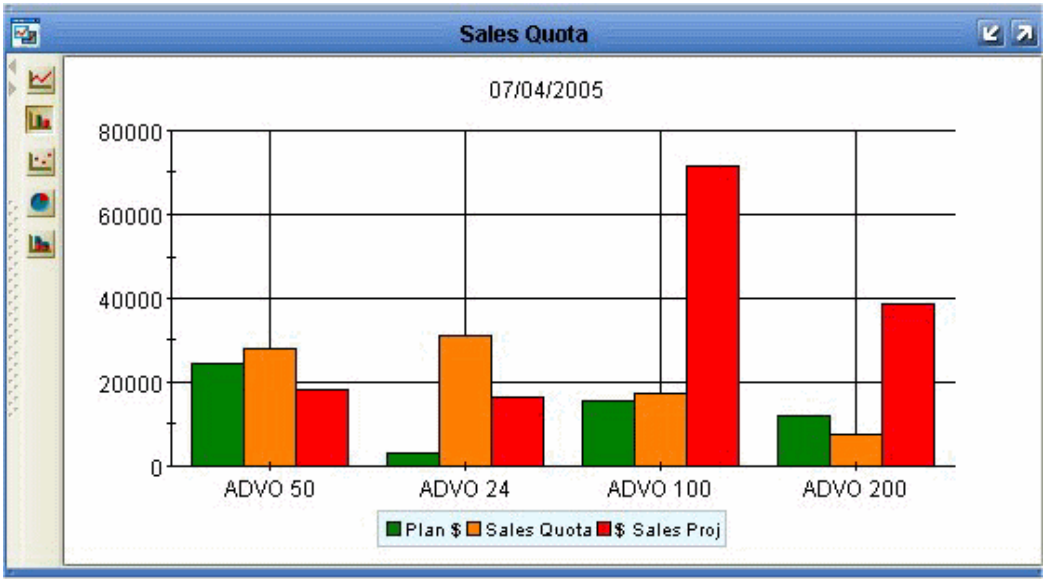
This table summarizes the volume information.

T1-World Brands Comb

Retailer	Actuals LY	Plan Vol	Sales Proj	Actuals Ttl	Base Fcst	Incr Fcst
Albertsons	2,493,003	2,593,003	2,201,506	1,230,472	1,706,149	495,358
Safeway	2,493,003	2,523,003	2,108,485	1,230,472	1,706,149	402,336
Winn-Dixie	2,493,003	2,493,003	2,108,485	1,230,472	1,706,149	402,336
Summary	7,479,009	7,609,009	6,418,476	3,691,416	5,118,446	1,300,030

Sales Quota

This graph shows the plan, the sales quota, and the projection for each retailer.



Possible Actions

In this worksheet, depending on your authorization, you can do the following:

- Edit fund rates, fixed funds, and quotas.
- Use File > Open to access other PTP worksheets. (It is not recommended to open the PMO worksheets this way, because they will not be filtered and will be slow.)

Managing Quotas and Funds at the Promotion Group Level

If you have already set quotas and funds at a high level, you might want to fine-tune

the amounts by adjusting values at the lower levels.

To manage quotas and funds at the promotion group level

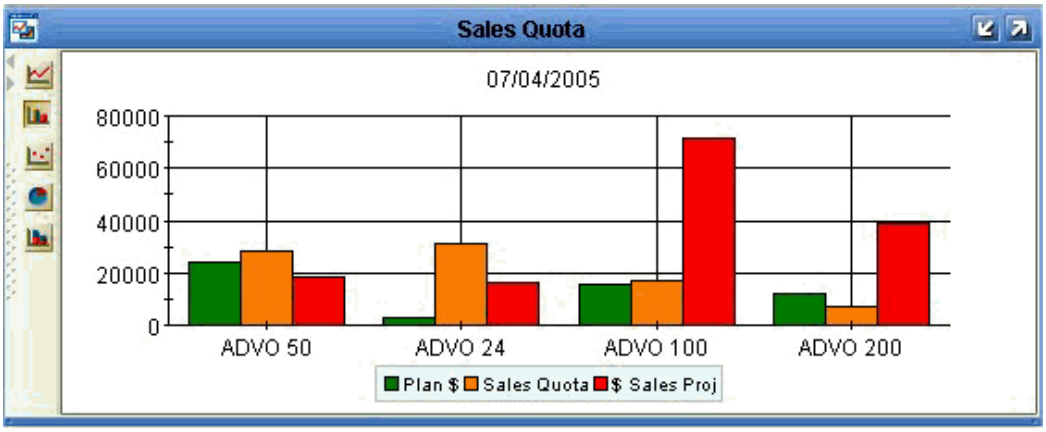
In the table, edit the quota and fund values as needed. You can select and edit multiple cells.

Entry Data

This table shows all the quotas and funds for the selection, by week.

Sales Quota

This graph shows the plan, the sales quota, and the projection for each promotion group.



Possible Actions

In this worksheet, depending on your authorization, you can do the following:

- Edit funds and quotas.
- Use File > Open to access other PTP worksheets. (It is not recommended to open the PMO worksheets this way, because they will not be filtered and will be slow.)

Viewing Quotas and Funds

If you are a sales representative, you can view authorized funds against your sales quota. You use the PTP: Quota and Fund View worksheet, which is a view-only worksheet.

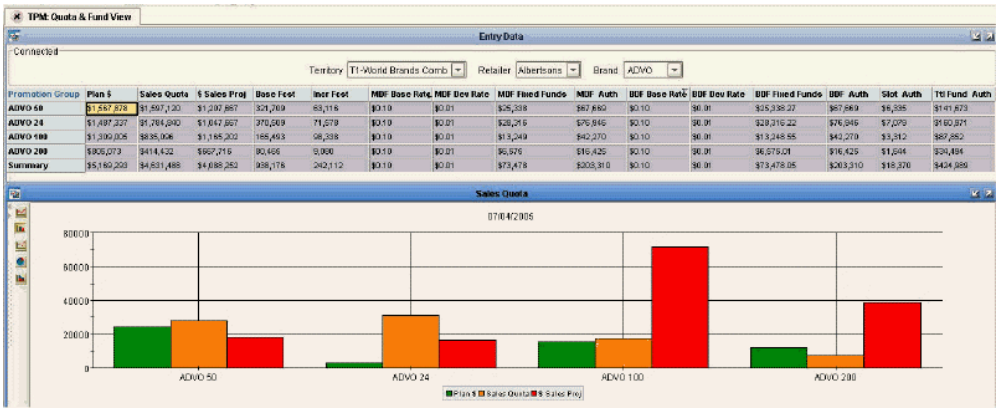
To view quotas and funds

1. In My Worksheets (in Collaborator Workbench), click PTP: Quota and Fund View.

   Or if a worksheet is currently open, click File > Open. Click PTP: Quota and Fund View and then click Open.

2. If the worksheet does not show data immediately, click Data > Rerun.

3. At the top of the screen, select the territory, retailer, and brand to display.



   The table shows all the quotas and funds for each brand, broken down by promotion group. For each promotion group, the quotas and funds are displayed for the entire year.

   The graph below that shows the quota for each promotion group.

Possible Actions

In this worksheet, depending on your authorization, you can do the following:

Use File > Open to access other PTP worksheets.

Reference

PTP: Quota and Fund Entry: Top-Down

This worksheet lets you set quotas and funds at the retailer level.

Basics

Accessing this worksheet	• In My Worksheets (in Collaborator Workbench), click PTP: Quota and Fund Entry: Top-Down. • If a worksheet is currently open, click File > Open. Click PTP: Quota and Fund Entry: Top-Down and then click Open.
Levels you can select	Territory
Levels used in cross tabulation	Retailer
Time aggregation	Yearly

Business Data

View	Series	Description
Entry Data	Plan $	The manufacturer's planned revenue
	Sales Quota	Sales quota (revenue)
	$ Sales Proj	Planned sales dollars: actuals plus forecast
	Sales Proj	Planned sales volume: actuals plus forecast
	Base Fcst	Base volume: actuals plus forecast
	Incr Fcst	Incremental volume: actuals and forecast due only to planned promotions
	MDF Base Rate	Market development fund base rate
	MDF Dev Rate	Market development fund development rate
	MDF Fixed Funds	MDF fixed funds
	MDF Auth	Authorized market development funds, calculated as follows: (base rate + dev rate)*volume + fixed MDF funds

View	Series	Description
	BDF Base Rate	Brand development fund base rate
	BDF Dev Rate	Brand development fund development rate
	BDF Fixed Funds	BDF fixed funds
	BDF Auth	Authorized brand development funds, calculated as follows: (base rate + dev rate)*volume + fixed BDF funds
	Slot Auth	Authorized slotting funds
	Ttl Fund Auth	Total authorized spending, including MDF, BDF, and slotting
Volume Details	Actuals LY	Actual demand one year ago
	Plan Vol	The manufacturer's planned volume
	Sales Proj	Planned sales volume: actuals plus forecast
	Actuals Ttl	Total actual quantity (including both base and incremental volume)
	Base Fcst	Base volume: actuals plus forecast
	Incr Fcst	Incremental volume: actuals and forecast due only to planned promotions
Sales Quota	Plan $	The manufacturer's planned revenue
	Sales Quota	Sales quota (revenue)
	$ Sales Proj	Planned sales dollars: actuals plus forecast

PTP: Quota and Fund Entry: Bottom-Up

This worksheet lets you set quotas and funds at lower levels.

Basics

Accessing this worksheet	• In My Worksheets (in Collaborator Workbench), click PTP: Quota and Fund Entry: Bottom-Up. • If a worksheet is currently open, click File > Open. Click PTP: Quota and Fund Entry: Bottom-Up and then click Open.
Levels you can select	Territory, Retailer, Brand, Promotion Group
Levels used in cross tabulation	None
Time aggregation	Weekly

Business Data

Same as for PTP: Quota and Fund Entry: Top-Down, except that this worksheet does not include a Volume Details area.

PTP: Quota and Fund View

This read-only worksheet lets you view quotas and funds.

Basics

This read-only worksheet lets you view quotas and funds.

Accessing this worksheet	• In My Worksheets (in Collaborator Workbench), click PTP: Quota and Fund View. • If a worksheet is currently open, click File > Open. Click PTP: Quota and Fund View and then click Open.
Levels you can select	Territory, Retailer, Brand
Levels used in cross tabulation	Promotion Group
Time aggregation	Weekly

Business Data

Same as for PTP: Quota and Fund Entry: Top-Down, except that this worksheet does not include a Volume Details area.

8

PTP: Tracking Volume

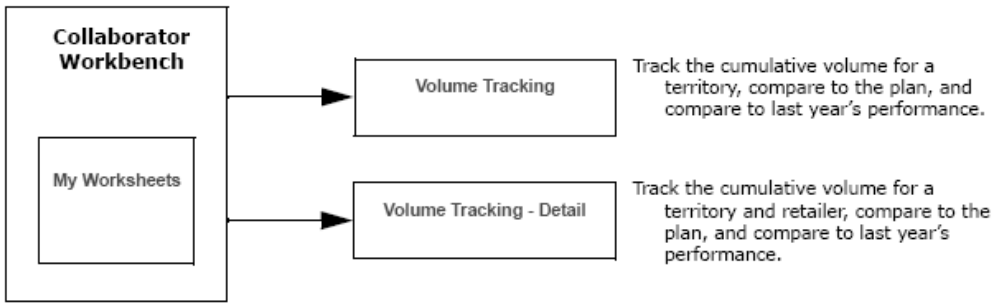
This chapter covers the following topics:

- Overview
- Reference

Overview

This chapter describes how track sales volume, as part of the PTP business process. It includes the following sections.

To track volume, you start in the Collaborator Workbench and launch the Volume Tracking worksheet:



The Volume Tracking report is where product, territory, and account volumes are forecasted and monitored to ultimately feed volume requirements to operations. Fund planning already covered will be integrated with volume planning, because forecast volumes drive budgets in live accrual environments and drive spending for case rate allowances and other variable spending deals.

In the Volume Tracking - Detail report, you can drill down to the retailers of a territory and see the same data.

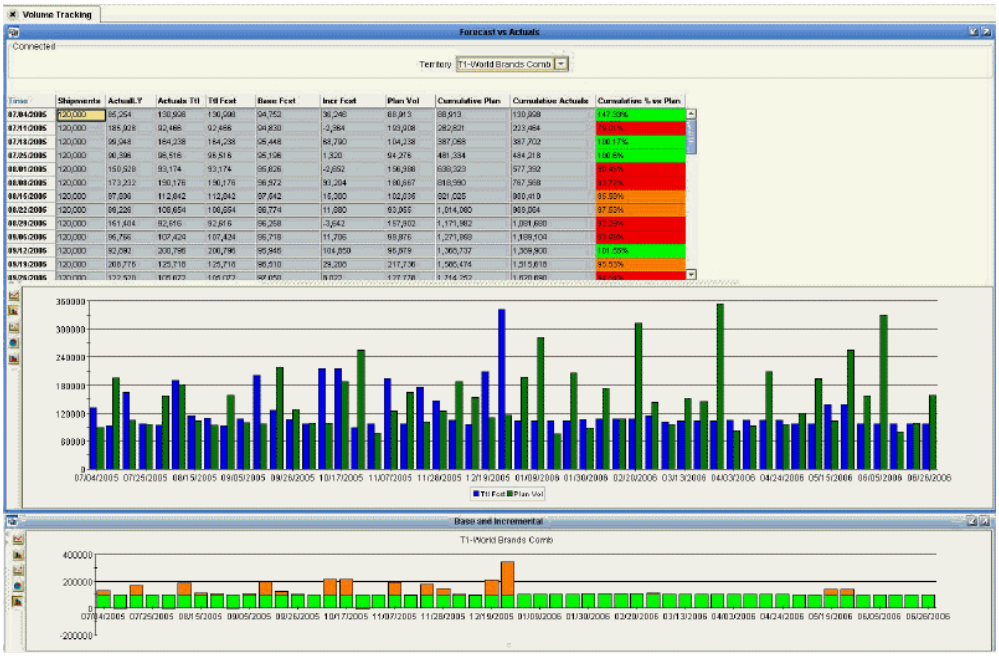
Tracking Volume for Territories

1. In My Worksheets (in Collaborator Workbench), click Volume Tracking

   Or if a worksheet is currently open, click File > Open. Click Volume Tracking and then click Open.

2. If the worksheet does not show data immediately, click Data > Rerun. Or click the Run button.

3. At the top of the screen, select the territory whose volume you want to see.



Volume Tracking Table

The table compares last year's sales to this year's plan, for the selected territory.

Time	Shipments	ActualLY	Actuals Ttl	Ttl Fcst	Base Fcst	Incr Fcst	Plan Vol	Cumulative Plan	Cumulative Actuals	Cumulative % vs Plan
07/04/2005	120,000	85,254	130,998	130,998	94,752	36,246	88,913	88,913	130,998	147.33%
07/11/2005	120,000	185,928	92,466	92,466	94,830	-2,364	193,908	282,821	223,464	79.01%
07/18/2005	120,000	99,948	164,238	164,238	95,449	68,790	104,238	387,059	387,702	100.17%
07/25/2005	120,000	90,396	96,516	96,516	95,196	1,320	94,276	481,334	484,218	100.6%
08/01/2005	120,000	150,628	93,174	93,174	95,826	-2,652	156,988	638,323	577,392	90.46%
08/08/2005	120,000	173,232	190,176	190,176	96,972	93,204	160,667	818,990	767,568	93.72%
08/15/2005	120,000	97,836	112,842	112,842	97,542	15,300	102,035	921,025	880,410	95.59%
08/22/2005	120,000	89,226	108,654	108,654	96,774	11,880	93,055	1,014,080	989,064	97.53%
08/29/2005	120,000	151,404	92,616	92,616	96,258	-3,642	157,902	1,171,982	1,081,680	92.29%
09/05/2005	120,000	95,766	107,424	107,424	95,718	11,706	99,875	1,271,858	1,189,104	93.49%
09/12/2005	120,000	92,892	200,796	200,796	95,946	104,850	96,879	1,368,737	1,389,900	101.55%
09/19/2005	120,000	208,776	125,718	125,718	96,510	29,208	217,736	1,586,474	1,515,618	95.53%
09/26/2005	120,000	122,520	105,072	105,072	97,050	8,022	127,776	1,714,252	1,620,690	94.54%

This table tracks the following on a weekly basis:

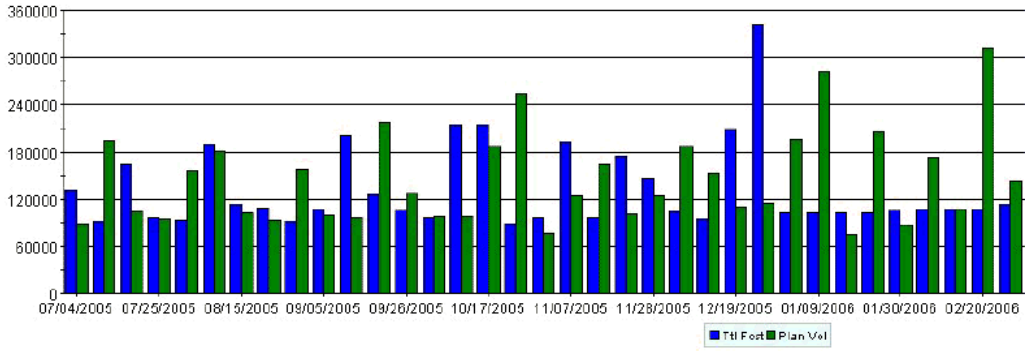
- Last year's shipments
- This year's shipments
- The current year's base volume projection
- The current year's incremental volume projection
- Cumulative % versus your plan

The information here can be updated weekly to give you an up-to-date tally of how you are performing versus your plan. Numbers are highlighted in different colors to give you a quick and easy way to keep abreast of your performance:

- Green is above plan
- Orange is slightly below plan (95-99.99%)
- Red is more than 5% below plan

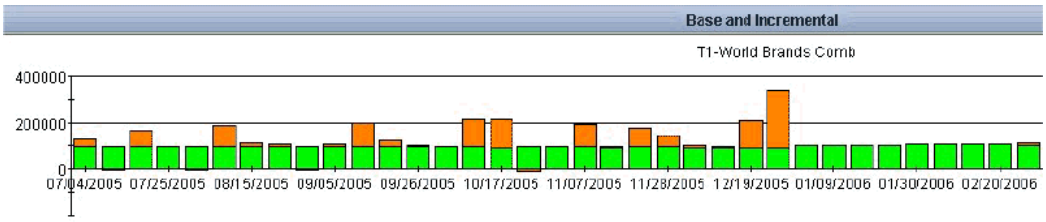
Volume Tracking Graph

The Volume Tracking graph gives you a week-by-week look at the plan and the total forecast.



Base and Incremental Graph

The Base and Incremental graph displays the current year's base and incremental sales.



Possible Actions

In this worksheet, depending on your authorization, you can do the following:

Use File > Open to access other PTP worksheets.

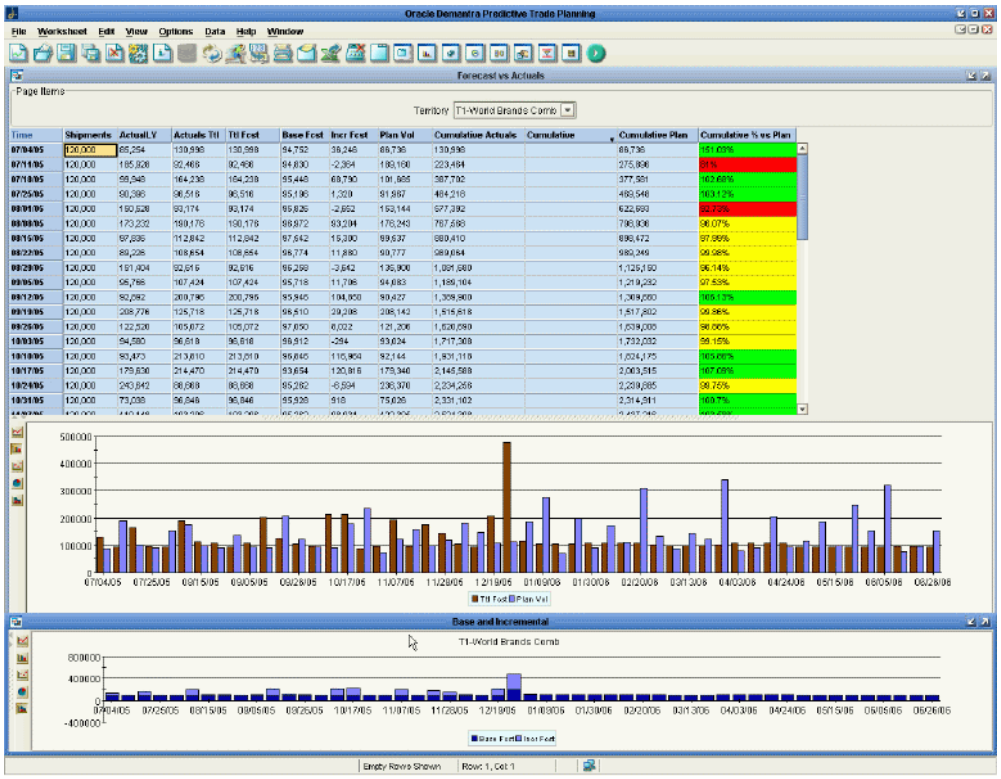
Tracking Volume for Retailers

1. In My Worksheets (in Collaborator Workbench), click Volume Tracking - Detail.

   Or if a worksheet is currently open, click File > Open. Click Volume Tracking - Detail and then click Open.

2. If the worksheet does not show data immediately, click Data > Rerun. Or click the Run button.

3. At the top of the screen, select the territory and then retailer whose volume you want to see.



This worksheet shows the same data as the Volume Tracking worksheet; see Tracking Volume for Territories, page 8-2.

Reference

Volume Tracking

This worksheet compares last year's sales to this year's plan.

Basics

Accessing this worksheet	• In My Worksheets (in Collaborator Workbench), click Volume Tracking. • If a worksheet is currently open, click File > Open. Click Volume Tracking and then click Open.
Levels you can select	Territory

Levels used in cross tabulation	None
Time aggregation	Weekly

Business Data

View	Series	Description
Forecast vs Actuals	Shipments	Historical shipment volume from the manufacturer to the retailers' locations
	ActualLY	Actual demand one year ago
	Actuals Ttl	Total actual quantity (including both base and incremental volume)
	Ttl Fcst	Total volume: base forecast plus incremental forecast
	Base Fcst	Base volume: actuals plus forecast
	Incr Fcst	Incremental volume: actuals and forecast due only to planned promotions
	Plan Vol	The manufacturer's planned volume
	Cumulative Actuals	Total actuals (base plus incremental) cumulative to date
	Cumulative Plan	Cumulative frozen planned volume
	Cumulative % vs Plan	Total cumulative actuals, as a fraction of the plan
Base and Incremental	Base Fcst	Base volume: actuals plus forecast
	Incr Fcst	Incremental volume: actuals and forecast due only to planned promotions

Volume Tracking - Detail

This worksheet compares last year's sales to this year's plan, at a lower level.

Basics

Accessing this worksheet	• In My Worksheets (in Collaborator Workbench), click Volume Tracking - Detail. • If a worksheet is currently open, click File > Open. Click Volume Tracking - Detail and then click Open.
Levels you can select	Territory, Retailer
Levels used in cross tabulation	None
Time aggregation	Weekly

Business Data

Same as in the Volume Tracking worksheet.

9

PMO: Planning Promotions

This chapter describes how to create promotions and make changes if needed, as part of the PMO business process.

This chapter covers the following topics:

- Introduction to the Planning Environment
- Creating a Promotion
- Marking a Promotion as Planned
- Approving a Promotion
- Committing a Promotion
- Marking a Promotion as Partially Paid or Paid
- Closing a Promotion
- Making Other Changes to a Promotion
- Duplicating a Promotion
- Copying and Pasting a Promotion
- Deleting a Promotion
- Reference

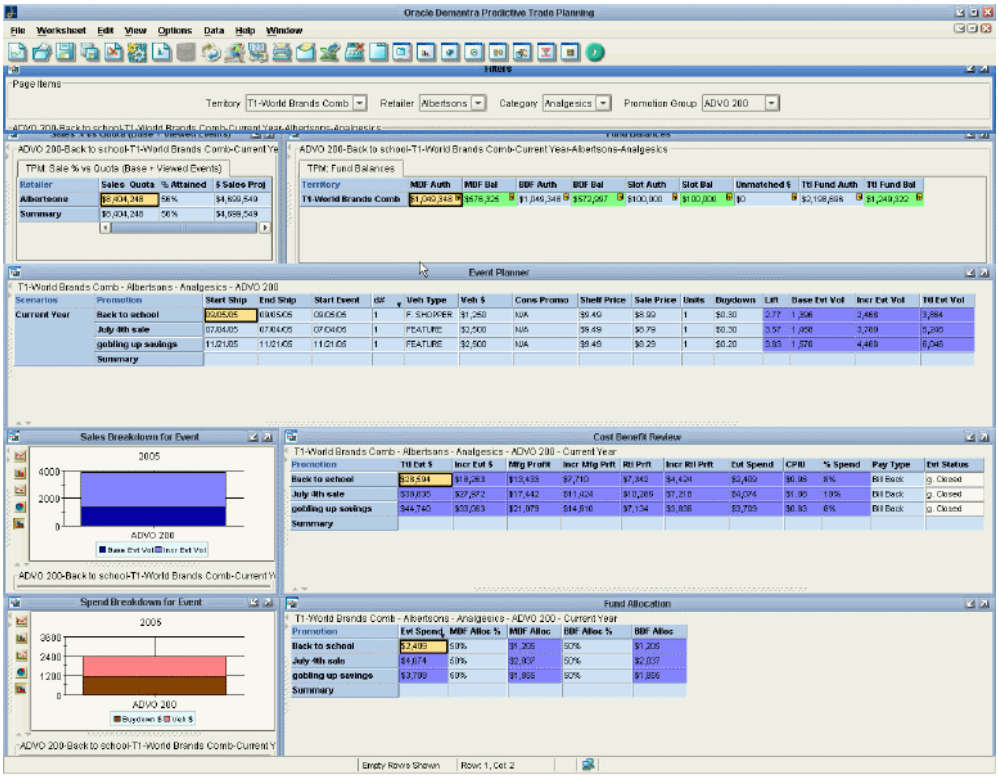
Introduction to the Planning Environment

You plan and manage promotions in the Planning Environment, which is the entry point to both historical and planned event analysis. Event planning consists of creating and managing a calendar of promotional events, and understanding their impact on sales, promotion spending, and profitability, as well as their correlation with sales quotas. Demantra's Planning Environment provides all this critical information in one place.

To open and navigate the Planning Environment

1. In My Worksheets (in Collaborator Workbench), click Planning Environment.

2. If the worksheet does not show data immediately, click Data > Rerun. Or click the Run button.



3. At the top of the screen, select the territory, retailer, category, and promotion group.

4. In the Event Planner window, click a row. Notice the following changes in the rest of the worksheet, depending on the scenario and promotion associated with that row:

   - The graphs below this display graphical information for the promotion.

   - The tables below this display side-by-side details for all promotions within the currently selected scenario.

5. Click a promotion in the Cost Benefit Review or Fund Allocation window. Notice that the same promotion is highlighted throughout the worksheet.

Color Conventions

The Planning Environment uses the following color conventions:

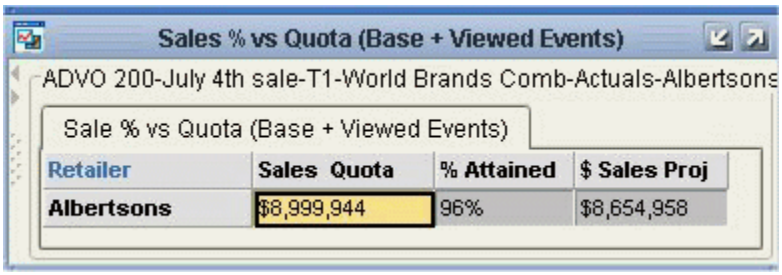
- White indicates editable fields.
- Gray indicates loaded data such as Start Ship and End Ship.
- Blue indicates data that is calculated by PTP, especially by the Analytical Engine.
- Red indicates negative profit numbers.

Also notice that in the Event Planner window, the Evt Status for a promotion may be displayed in different colors, to indicate whether that promotion has been optimized. Here:

- White means that the promotion has not been optimized.
- Yellow means that the promotion has been optimized.
- Green means that the promotion has been optimized and accepted, so that the promotion is using the optimization results.

Sales % vs. Quota

This window shows an analysis of planned sales to sales quota, for the given retailer. This is the total for the retailer. For convenience, the sales projection is also shown.



Fund Balances

This window provides a detailed overview of authorized funds (MDF, BDF, slotting), spend and fund balances to date, for the given territory. This is the total for the territory.

Fund Balances

ADVO 200-July 4th sale-T1-World Brands Comb-Actuals-Albertsons-ANALGESICS

Fund Balances

Territory	MDF Auth	MDF Bal	BDF Auth	BDF Bal	Slot Auth	Slot Bal	Unmatched $	Ttl Fund Auth	Ttl Fund Bal
T1-World Brands Comb	$1,883,756	$1,411,843	$1,883,756	$1,400,508	$0	$0	$0	$3,767,512	$2,812,351

Event Planner

This window shows event details such as the start and end ship dates, vehicle type, vehicle cost, buydown, base volume and incremental volume. Incremental volume is generated by Demantra's comprehensive analytical engine.

Event Planner

T1-World Brands Comb - Albertsons - ANALGESICS - ADVO 200

Scenarios	Promotion	Start Ship	End Ship	Start Event	# Wks	Veh Type	Veh $	Cons Promo	Shelf Price	Sale Price	Units	Buydown	Lift	Base Evt Vol	Incr Evt Vol	Ttl Evt Vol
Actuals	July 4th sale	07/04/2005	07/04/2005	07/04/2005	1	FEATURE	$2,500	N/A	$9.49	$8.79	1	$0.30	3.57	1,468	3,780	5,248
Current Year	Back to school	09/05/2005	09/05/2005	09/05/2005	1	F. SHOPPER	$1,250	N/A	$9.49	$8.99	1	$0.30	2.77	1,396	2,468	3,864
	gobling up savings	11/21/2005	11/21/2005	11/21/2005	1	FEATURE	$2,500	N/A	$9.49	$8.29	1	$0.20	3.63	1,578	4,468	6,046
	Summary															
Summary																

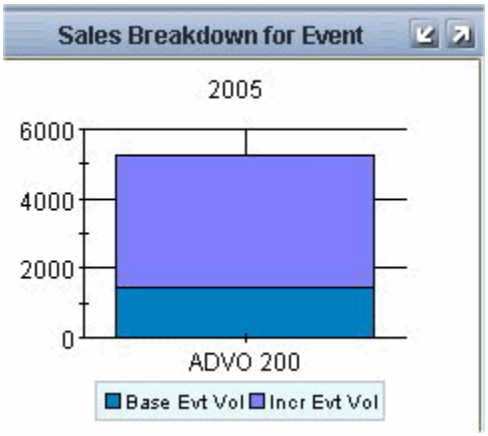
Notice that the events are grouped according to the associated scenario. As noted in "Promotions and Scenarios", the Sandbox scenario contains all the tentative events (unplanned events), and the Current Year scenario contains all the rest. The unplanned events have no impact on budget.

This window is the primary area in which you create or modify promotions.

Also notice that when you select a row in this window, the graphs and tables below are updated to show details depending on the scenario and promotion associated with that row.

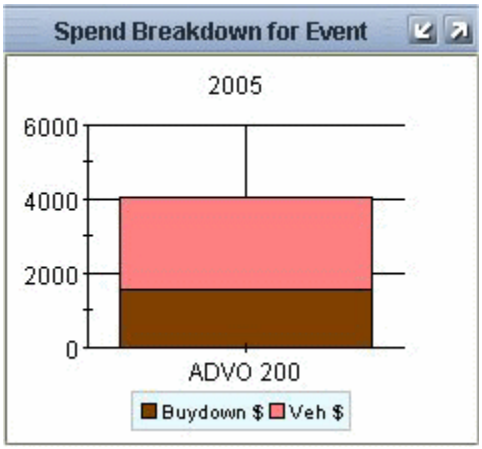
Sales Breakdown for Event

This window graphically shows the sales breakdown for the selected event. The breakdown shows both base and incremental volume.



Spend Breakdown for Event

This window graphically shows the spending breakdown for the selected event. The breakdown shows both vehicle spending and buydown.



Cost Benefit Review

This window presents a detailed cost benefit analysis for each event in the currently selected scenario. Details include profitability metrics from both the manufacturer and retailer's perspective, overall event spend, cost per incremental unit (CPIU), and payment type. Here you can control the status of the event.

Cost Benefit Review

T1-World Brands Comb - Albertsons - ANALGESICS - ADVO 200 - Actuals

Promotion	Ttl Evt $	Incr Evt $	Mfg Profit	Incr Mfg Prft	Rtl Prft	Incr Rtl Prft	Evt Spend	CPIU	% Spend	Pay Type	Evt Status
July 4th sale	$38,835	$27,072	$17,442	$11,424	$10,288	$7,218	$4,074	$1.08	10%	Bill Back	g. Closed

The incremental manufacturing profit is the additional profit that the manufacturer earns because of the promotion, *in addition to the base profit* that would be earned even without a promotion. The incremental retailer profit is analogous.

Fund Allocation

This window displays the allocated funding for each event in the currently selected scenario. Here you allocate the promotional costs between the MDF and BDF funds.

Fund Allocation

T1-World Brands Comb - Albertsons - ANALGESICS - ADVO 200 - Actuals

Promotion	Evt Spend	MDF Alloc %	MDF Alloc	BDF Alloc %	BDF Alloc
July 4th sale	$4,074	50%	$2,037	50%	$2,037

Possible Actions

In this worksheet, depending on your authorization, you can do the following:

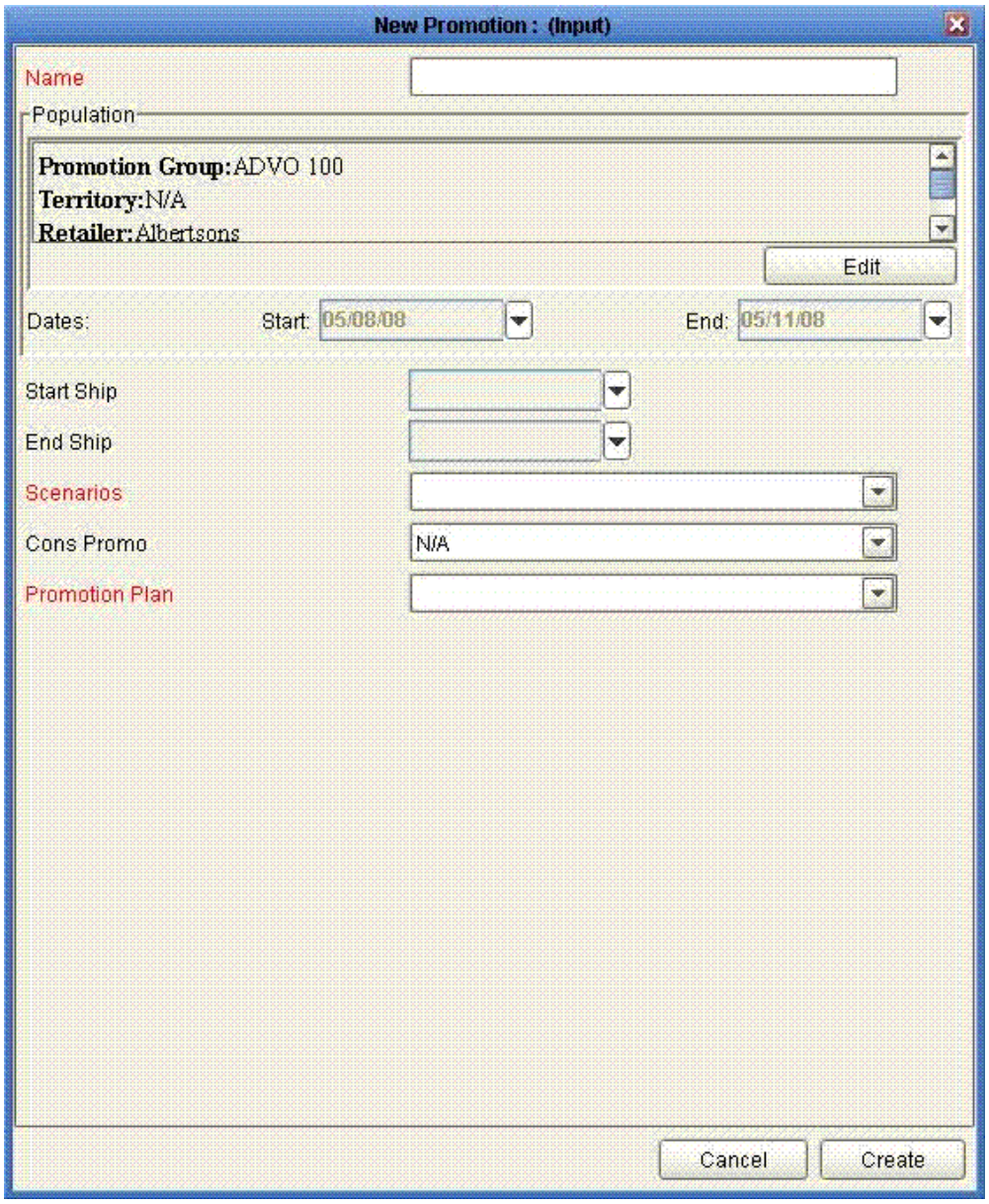
- Edit a promotion, by changing the sale price and other properties. You can also right-click a promotion and select Edit to access other properties.
- Copy and paste promotions. See Copying and Pasting a Promotion, page 9-15.
- Delete promotions. See Deleting a Promotion, page 9-16.
- Run simulations. See Running a Simulation, page 10-3. Note that this worksheet does not contain the data needed to find cannibalization.
- Run optimization. See Optimizing a Promotion, page 10-4.
- Right-click on a promotion and open other worksheets filtered to this promotion. For example, see Examining Promotoins from a Retailer's Point of View, page 11-6 .
- Right-click on a scenario and open the PMO: Promotion Comparison worksheet filtered to that scenario. See Comparing Promotions in a Scenario, page 11-8.

Creating a Promotion

To create a promotion

1. Open the Planning Environment; see "Introduction to the Planning Environment".
2. At the top of the screen, select the territory, retailer, category, and then promotion group with which you want to create the promotion.
3. In the Event Planner window, right-click an existing promotion and then select New Promotion.

   Oracle Demantra displays the following screen.



4. For Name, specify a name for this promotion.

5. The Population area shows the currently selected combinations with which the new promotion will be associated.

   The default combinations are taken from the current selection in the worksheet. To change them, see "To reassign a promotion to a different item or location".

6. The Start and End dates are controlled by default settings. Edit them as needed.

7. Specify values for the other attributes as appropriate:

Start Ship, End Ship	Optionally specify when the product will be shipped for the promotion. You might specify this information later, when the promotion is more certain.
Scenarios	Choose Sandbox.
Cons Promo	Specify the type of consumer overlay, if any. This affects the number of Units. For example, if Cons Promo is a two-for-one deal, then Units becomes 2.

8. Click Create. The new promotion is created and is displayed in the Event Planner window. It has a default cost based on the vehicle type you specified.

9. Specify the Sale Price for use during the promotion.

10. Specify the costs for this promotion:r this promotion:

    1. If the Veh Type is incorrect, change it, save the data and rerun the worksheet. Then PTP puts the default fixed cost for the new vehicle type into the Veh $ series.

    2. Optionally edit Veh $, if the fixed cost for this promotion is different from the default.

    3. For Buydown, specify the discount per promoted unit that will be paid to the retailer.

11. Click Data > Save Data.

Because this promotion is unplanned, it is considered hypothetical and does not have an impact on the promotion funds or on the forecast.

See also

"Duplicating a Promotion"

"Copying and Pasting a Promotion"

Marking a Promotion as Planned

Before you mark a promotion as planned, you may want to run simulation, optimization, or both, as described in "PMO: Simulation and Optimization."

Before marking a promotion as planned, you also generally examine the promotion to be sure you have chosen the best vehicle type and so on. You may want to create several tentative promotions (all in the Sandbox scenario) and view them side by side. See

"PMO: Examining and Comparing Promotions."

To mark a promotion as planned

1. In the Fund Allocation window, change MDF Alloc % as desired. This specifies the percentage of the event that is funded by MDF. Enter 50 for 50%, for example.

   The remainder is automatically funded by BDF, as PTP automatically computes BDF Alloc % and BDF Alloc.

2. In the Cost Benefit Review window, change the Evt Status of the promotion to Planned.

3. Right-click the promotion and then select Edit Promotion.

4. Change Scenarios to Current Year.

5. Click OK.

6. Click another promotion in the worksheet. PTP automatically updates the details for the newly planned promotion. Notice that the promotion now consumes funds and has an impact on sales projections.

Approving a Promotion

To approve a promotion

1. In the Event Planner window, change the Evt Status to Approved.

2. Click Data > Save Data.

3. Rerun the worksheet.

Committing a Promotion

You commit a promotion when you have a firm commitment from the retailer to run the promotion. When you commit a promotion, PTP takes a snapshot of the current state of the promotion, for use in later analysis. The committed promotions are included in all projections. PTP also freezes the promotion at this point, so that you cannot change its properties (apart from advancing the status further).

To commit a promotion

1. In the Event Planner window, change the Evt Status to Committed.

2. Click Data > Save Data.

3. Optionally, to see the projections that PTP has just captured, use the PMO: Promo-Evaluation: Mfg or PMO: Promo-Evaluation: Rtl worksheet. See "PMO: Reviewing Past Performance."

Marking a Promotion as Partially Paid or Paid

To mark a promotion as paid

1. Open the Planning Environment; see "Introduction to the Planning Envirnoment."

2. In the Event Planner window, change the Evt Status to Partial Paid or Paid.

3. Click Data > Save Data.

4. Rerun the worksheet.

Closing a Promotion

To close a promotion

1. Open the Planning Environment; see "Introduction to the Planning Environment".

2. In the Event Planner window, change the Evt Status to Closed.

3. Click Data > Save Data.

4. Rerun the worksheet.

Making Other Changes to a Promotion

This section describes generally how to make other changes to a promotion. You typically make changes in the Planning Environment; see "Introduction to the Planning Environment".

> **Note:** Before you change a promotion, you should change its status back to Unplanned. After making your change, restore the previous status. This procedure ensures that PTP triggers all internal processes as needed.

To modify a promotion

1. In the Event Planner window, edit any details in the row corresponding to the promotion.
2. Click Data > Save Data.
3. If you changed the Veh Type, rerun the worksheet to see the new default cost of this promotion.

To rename a promotion

1. Right-click it and click Edit.
2. Type a new name and click OK.

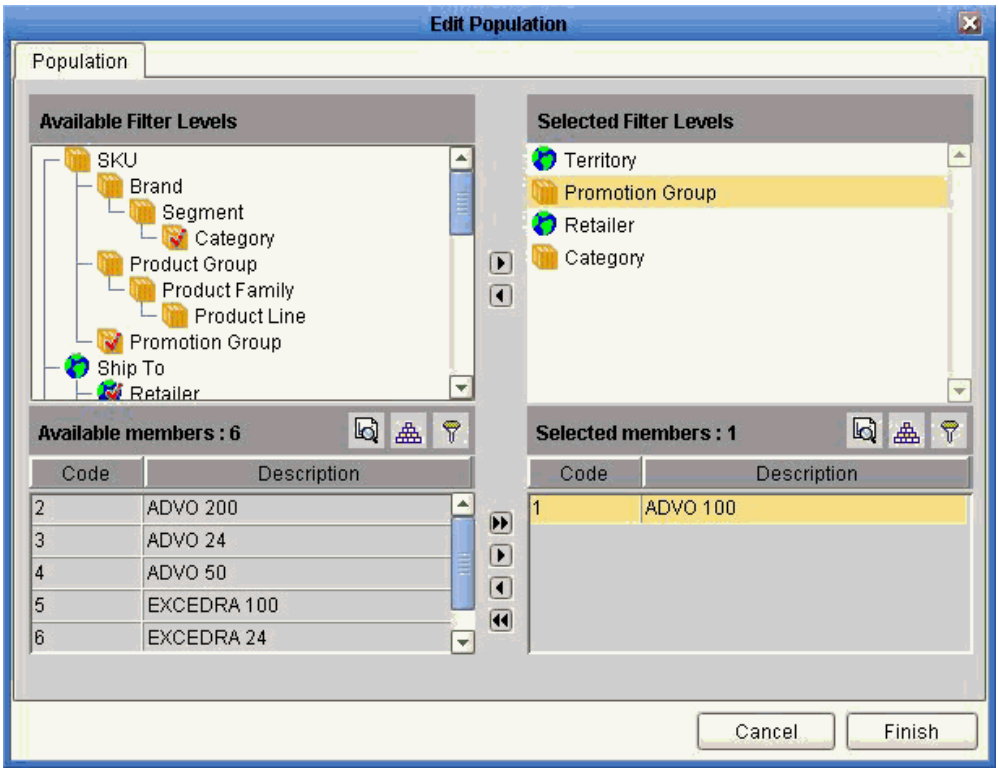
To reassign a promotion to a different item or location

You can reassign an unplanned promotion to associate it with a different territory, retailer, item, or Ship To, as needed.

> **Important:** You must create both a Refresh Population workflow and method before executing this procedure. First, create a Refresh Population workflow that contains only the Refresh Population workflow step. Then create the Refresh Population method on the Promotion level without any input or output arguments and link it to the Refresh Population workflow.

1. Right-click a promotion and click Edit.
2. Click Edit below the Population area.

   The Edit Population dialog box is displayed.



Usually a promotion is associated with a territory, retailer, category, and promotion group.

To change the territory, retailer, category, or promotion group, click that level name in Selected Filter Levels and change the selection displayed in Selected members.

For example, to associate the promotion with a different promotion group:

1. In Selected Filter Levels, click Promotion Group.
2. Then in the Selected members list, double-click the promotion group that you no longer want to use for this promotion. For example, double-click ADVO 100 to remove it from this list.
3. Then in Available members, double-click the promotion group that should be used. This promotion group is then moved to the Selected members list. For example, double-click ADVO 200 to move it to the Selected members list; now the promotion is associated with ADVO 200 instead of ADVO 100.

3. Repeat as necessary.
4. Click Finish to exit this dialog box.
5. Click Finish. The changes are saved.

6. From the TPM: Planning Environment worksheet, right-click on the promotion group you have modified.

7. Choose the Refresh Population method from the menu.

8. Rerun the worksheet to see the changes.

See Also

- "Refresh Population Workflow Step" in the Oracle Demantra Implementation Guide for more information about configuring the Refresh Population workflow step.

- "System Parameters" in the Oracle Demantra Implementation Guide for more information about the CopyPasteIntersect system parameter which determines how volume is distributed when an item is moved from one promotion group to another.

- "Specifying Data Properties of a Series" in the Oracle Demantra Implementation Guide for more information about how to configure the Copy/Paste preservation Type series setting.

Duplicating a Promotion

The Duplicate method enables you to duplicate an existing promotion with the same duration and population (item/location). All attributes and series remain the same as the original except for the name of the promotion, its event status and starting date. If you want to perform a context sensitive copy of a promotion from one account to another and substitute accounts, use the Copy/Paste procedure instead. The Duplicate method only works on the promotion level.

To duplicate a promotion

1. Start in the TPM: Planning Environment worksheet. A list of scenarios and promotions are displayed.

2. Right-click a promotion and choose Duplicate from the methods menu. The Duplicate Promotions form appears.

3. Input the following information about the duplicate promotion:

Field name	Description
Name	The promotion name.

Field name	Description
Event Status	The status of the event. Options include: • a. Unplanned • b. Planned • c. Approved • d. Committed • e. Partial Paid • f. Paid • g. Closed
Start Event	The starting date for the promotion event. A calendar is available to assist you. If you do not specify a starting date for the promotion event, it will default to the date used for the original promotion. **Note:** If you specify the start date of the promotion, the duration of the promotion remains the same as the original promotion.

Note: Only the values of those attributes that appear in the Duplicate Promotions form can be changed during the duplication process. All other attributes remain the same as the original. The fields in the Duplicate Promotions form can be modified in the Business Modeler by the Administrator to include additional attributes except Population. For more information about how to customize the duplicate promotions method, see "Configuring Methods" in the Demantra Implementation Guide. If you want to change the population, create a new promotion or copy and paste a promotion.

4. Check the Save Parameters option if you want to customize the form's defaults.
5. Click Duplicate Promotion. The new promotion appears in the worksheet.

Copying and Pasting a Promotion

Copying and pasting a promotion is another method that can be used to create a new promotion. Copying and pasting a promotion differs from duplicating a promotion because it is context sensitive and allows you to:

- replace the population (for example, copying a promotion from ABC Company to XYZ Company replaces the account).
- change the promotion duration. The data is adjusted to make the new promotion similar to the original promotion.

To copy and paste a promotion

1. You typically start in the Planning Environment; see "Introduction to the Planning Environment".
2. In the Event Planner window, right-click a promotion and click Copy.

   Tip: You can do the same thing in any area of the worksheet that displays promotions.

3. Right-click and then select Paste.

   Oracle Demantra displays a dialog box that asks for details about the copy.

4. Specify one of the following:
   - To shift the dates of the newly copied promotion, specify a number in the Shift By field. The copy will be shifted later in time by the specified amount, but will last for the same length of time. You can use any integer, including negative number or zero.
   - To specify a different start and end date, specify values in the From and To fields.
   - To make the new promotion span the entire length of time used in the worksheet, select Worksheet Derive.
5. Click OK.
6. When prompted for a new promotion name, type the name and click OK.

Deleting a Promotion

To delete a promotion

1. You typically start in the Planning Environment; see "Introduction to the Planning Environment."
2. In the Event Planner window, right-click a promotion and click Delete.

   Tip: You can do the same thing in any area of the worksheet that displays promotions.

3. Oracle Demantra prompts you to confirm the action. Click Yes or No.
4. Rerun the worksheet to see the change.

Reference

Planning Environment

Basics

Accessing this worksheet	• In My Worksheets (in Collaborator Workbench), click Planning Environment. • If a worksheet is currently open, click File > Open. Click Planning Environment and then click Open.
Levels you can select	Territory, Retailer, Category, Promotion Group
Levels used in cross tabulation	Scenario, Promotion
Time aggregation	Yearly

Business Data

View	Series	Description
Sales % vs Quota (Base + Viewed Events)	Sales Quota	Sales quota (revenue)
	% Attained	Percentage of sales quota attained
	$ Sales Proj	Planned sales dollars: actuals plus forecast
Fund Balances	MDF Auth	Authorized market development funds, calculated as follows: (base rate + dev rate)*volume + fixed MDF funds
	MDF Bal	Remaining market development funds, calculated as the authorized MDF less the spent or committed funds
	BDF Auth	Authorized brand development funds+D75
	BDF Bal	Remaining brand development funds, calculated as the authorized BDF less the spent or committed funds
	Slot Auth	Authorized slotting funds
	Slot Bal	Remaining slotting budget, accounting for the part that has been spent
	Unmatched $	Trade spend not yet matched to a promotion.
	Ttl Fund Auth	Total authorized spending, including MDF, BDF, and slotting
	Ttl Fund Bal	Remainder of total authorized spending, after accounting for spending
Event Planner	Start Ship	Date when product will start to ship
	End Ship	Date when shipments will end for the event

View	Series	Description
	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion
	Veh $	Vehicle cost for the promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer
	Sale Price	Sale price per unit at shelf
	Units	Number of units in the deal to the consumer. Usually equal to 1. Use 2 for 2-for-1 sales, for example.
	Buydown	Buydown allowance per unit, discount offered to retailer for running the event
	Lift	Lift factor for the promotion
	Base Evt Vol	Base volume during the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt Vol	Total volume for the promotion
Sales Breakdown for Event	Base Evt Vol	Base volume during the promotion
	Incr Evt Vol	Incremental volume due to the promotion
Cost Benefit Review	Ttl Evt $	Total sales during the promotion, for the manufacturer

View	Series	Description
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Mfg Profit	Manufacturer's profit from the event
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion
	Rtl Prft	Retailer's profit from the event
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Evt Spend	Total planned spending for promotion, sum of buydown, vehicle costs, and slotting
	CPIU	Event cost per incremental unit sold as a result of the promotion.
	% Spend	Event spending, as a percentage of event sales
	Pay Type	Indicates the payment terms between the manufacturer and the retailer for this promotion
	Evt Status	Current status of the promotion
Spend Breakdown for Event	Buydown $	Buydown spend for the promotion
	Veh $	Vehicle cost for the promotion
Fund Allocation	Evt Spend exS	Total planned buydown and vehicle costs for promotion
	MDF Alloc %	Market development funds, as a percentage of total plan spending (excluding slotting costs).

View	Series	Description
	MDF Alloc	Allocated market development funds, based on the percentage set by the planner
	BDF Alloc %	Brand development funds, as a percentage of total plan spending (excluding slotting costs)
	BDF Alloc	Allocated brand development funds, based on the percentage set by the planner

10

PMO: Simulation and Optimization

This chapter covers the following topics:

- Overview
- Running the Analytical Engine in Simulation Mode
- Running a Simulation
- Optimizing a Promotion
- Viewing Optimization Results
- Accepting an Optimized Promotion
- Reference

Overview

Before you mark a promotion as planned (or before you commit a promotion), you may want to run a simulation on it, or run the optimizer, or both. This chapter describes how to perform these tasks. It includes the following sections:

You may also want to examine the promotion in detail or create several tentative promotions (all in the Sandbox scenario) and view them side by side. See PMO: Examining and Comparing Promotions - Comparing Promotions in a Scenario, page 11-8.

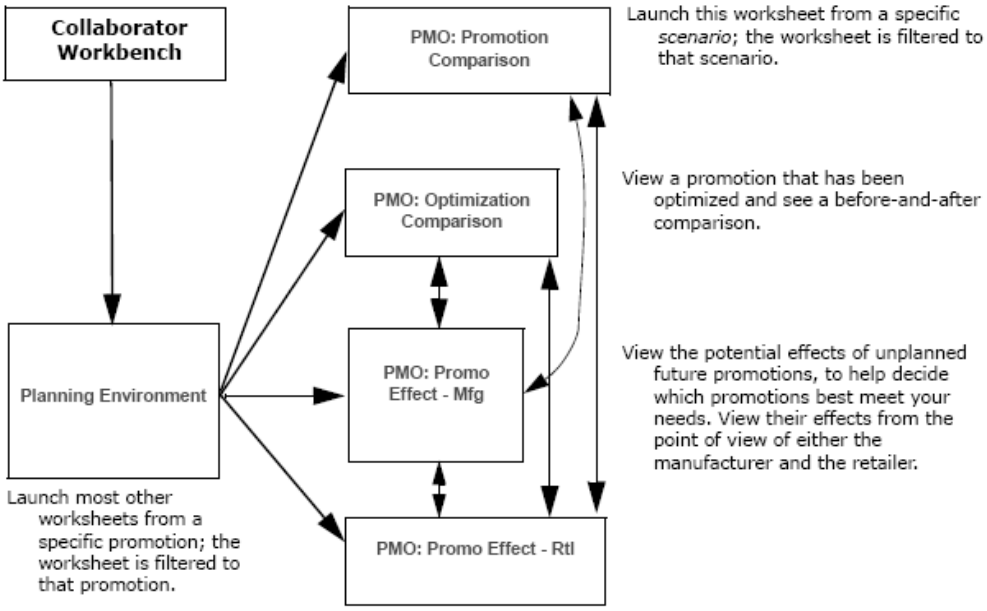
A qualified user or administrator typically runs the Analytical Engine periodically in batch mode to generate a forecast for all items and locations in the system. The forecast data includes total volume, base volume (volume in the absence of promotions), incremental volume, pre- and post-promotional volume, and volume due to cannibalization.

To see an immediate forecast for a newly entered promotion, however, you do not have to wait for the next batch run, You can simply run a simulation, which considers only one promotion. With the forecasted numbers, you can see the effect on quota, accruals, spending, and so on. Likewise, if you change the properties of a promotion, you can run

a simulation to see the resulting forecast.

Also, to help you find the most effective promotion for your needs, PTP provides the ability to optimize a promotion. The Promotion Optimization module uses the previously stored results of the Analytical Engine. You provide a specific goal and constraints, and the optimizer determines the best set of promotion properties. PTP provides a worksheet for viewing the optimized results, which you can then accept, if these results meet your needs.

In principle, you can run simulation or optimization anywhere PTP displays future promotions. Then you can open another worksheet filtered to your promotion to see further details. Or you can first open that worksheet and then run simulation or optimization. Several worksheets are useful for these purposes.



The path you choose depends on what meets your needs at any time, but consider the following general principles:

- If you run a simulation in the Planning Environment or the PMO: Optimization Comparison worksheet, the engine does not have the data needed to see cannibalization, which means that you may need to rerun simulation later in a different worksheet. If you run simulation in the other worksheets (PMO: Promotion Comparison, PMO: Promo Effect - Mfg, and PMO: Promo Effect - Rtl), the Analytical Engine can find cannibalization.

- The PMO: Optimization Comparison worksheet is the only place that displays optimization results.

Note: Before you can perform either simulation or optimization, it

is necessary to run the Analytical Engine in batch mode once in your application. See Running Required Workflows, page 14-2.

Running the Analytical Engine in Simulation Mode

Before you can perform simulations, you must start the Analytical Engine in simulation mode. Note that an error will occur if the Analytical Engine has not been run previously in batch mode.

To run the engine in simulation mode

1. Click Start > Programs.
2. Click Demantra > Demantra Spectrum release > Simulation Engine.

Running a Simulation

You can run a simulation to get a forecast for a promotion, particularly a newly created promotion or a promotion that you have just changed.

Note: The promotion must start in the future.

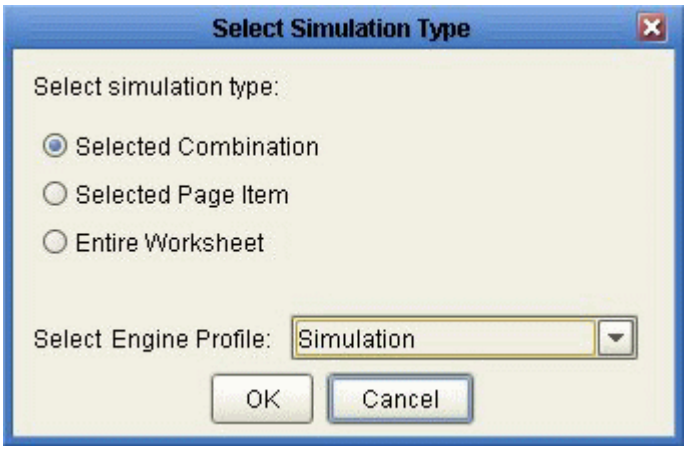
To run a simulation

1. Make sure the Analytical Engine is running in simulation mode; see Running the Analytical Engine in Simulation Mode, page 10-3.
2. Start in the Planning Environment worksheet.
3. Right-click a promotion and launch a worksheet, such as PMO: Promo Effect - Mfg or PMO: Promo Effect - Rtl.

   Note: In principle, you can run a simulation in any worksheet. Note that if you run a simulation in the Planning Environment worksheet, however, the engine does not have the data needed to see cannibalization.

4. Click Data > Run Simulation. Or click the Simulation button.

   The Select Simulation Type page appears.



5. Click Selected Combination.
6. For Select Engine Profile, click Simulation.
7. Click OK.

   Depending on the amount of data in your worksheet, simulation may take a few minutes.
8. When the simulation is complete, Oracle Demantra displays a message. Click OK.
9. Rerun the worksheet.
10. Examine the results.
11. To accept the results, click Data > Accept Simulation.

Optimizing a Promotion

PTP provides an optimizer that you can use to find the best possible promotion to maximize revenue, profit, or units. It considers constraints such as the following:

- Retailer-specific details such as minimum needed retailer event margin. You can override the retailer's default event margin if needed.
- Maximum budget and buydown for this promotion.
- Basics such cost of goods, list price, and so on.

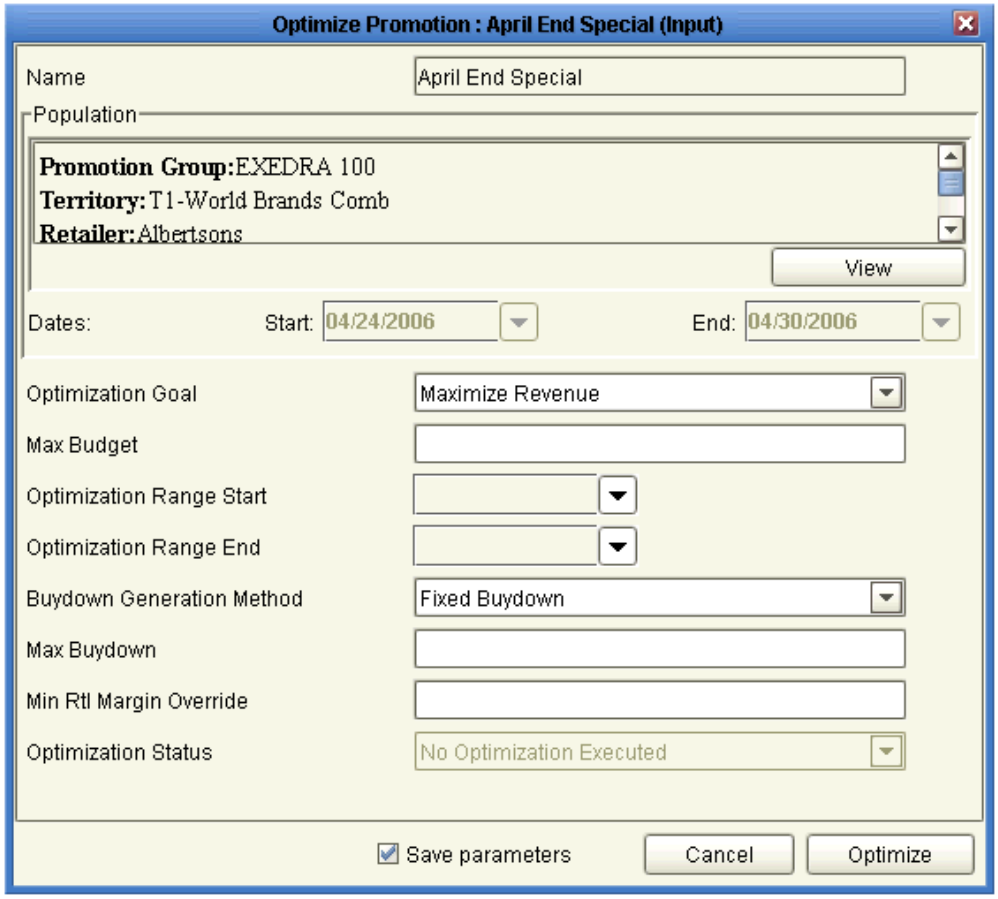
To optimize a promotion

1. You typically start in the Planning Environment or the PMO: Optimization

Comparison worksheet. See Introduction to the Planning Environment, page 9-1 and Viewing Optimization Results, page 10-7.

2. In the Event Planner window, right-click any future promotion and click Methods > Optimize.

   PTP displays the Optimize Promotion dialog box.



3. Specify values for the following parameters:

Optimization Goal	Select one of the following goals for this promotion: • Maximize Revenue • Maximize Profit • Maximize Units

Max Budget	Maximum allowed budget for this promotion. If you leave this unspecified, there is no maximum budget.
Optimization Range Start, Optimization Range End	If these are blank, Promotion Optimization assumes that you want the optimized promotion to fall within the span of time of the original promotion. If you want Promotion Optimization to search for a better time for this promotion, use these parameters to specify the range of time for optimization to consider.
Buydown Generation Method	Specify whether Promotion Optimization should use the buydown that you have already entered or calculate an optimal buydown for this promotion.
Max Buydown	Maximum allowed buydown for this promotion. If Promotion Optimization calculates an optimal buydown, the buydown will not exceed this value.
Min Rtl Margin Override	Minimum margin that the retailer must make on this promotion, as specified in this retailer's profile. Use this parameter to override that value, if needed. Use a value greater than 0 and less than or equal to 1.

4. Click Optimize.

   Now the system will select the promotion parameters (sale price, vehicle type, and so on) that best meet your goal. This is a huge time saver because you do not have to go through all the possible permutations of each promotion in order to find the best one for your goal.

   When optimization is complete, PTP displays a message that indicates the status of the optimization and the number of iterations that it ran. (You may not see this message, depending on how PTP is configured.)

   Then PTP asks if you want to rerun the worksheet.

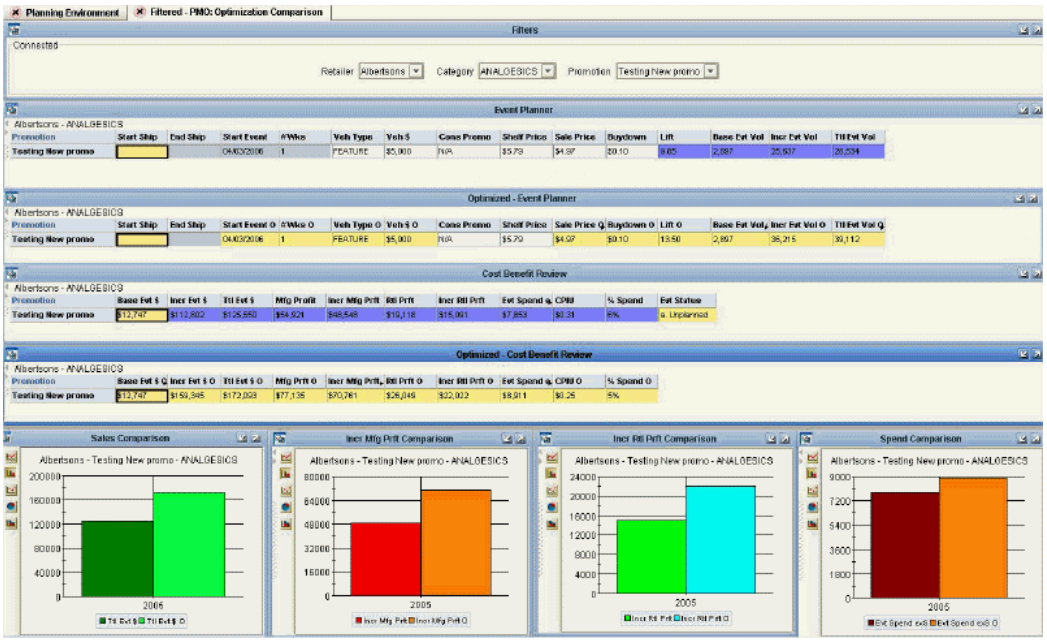
5. Click OK.

6. If you are not yet in the PMO: Optimization Comparison worksheet, right-click the promotion and open that worksheet. See Viewing Optimization Results, page 10-7
   .

Viewing Optimization Results

To view optimization results

If you are not yet in the PMO: Optimization Comparison worksheet, right-click the promotion and click Open With > PMO: Optimization Comparison.



The PMO: Optimization Comparison worksheet provides the capability to view the optimization results (shown in yellow) and compare them to the current state of the promotion, to help you decide if you want to accept this optimization. This worksheet contains the following information.

Event Planner and Optimized Event Planner

These windows provide details of the events, including start and end ship dates, vehicle type, vehicle cost, buydown, base volume and incremental volume. Incremental volume is generated by Oracle Demantra's comprehensive analytical engine.

The Event Planner window shows these details for the actual promotion as it currently is. The Optimized - Event Planner window shows the details of the optimized promotion. If you accept the optimization, these details are moved to the actual

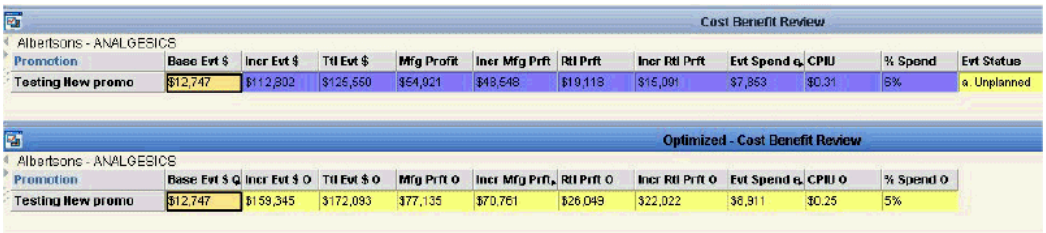
promotion.

Notice that the values are given right below the original values of the promotion to facilitate easy comparison.

If you have not yet optimized this promotion, the Optimized - Event Planner window is empty.

Cost Benefit Review and Optimized - Cost Benefit Review

These windows display a detailed cost benefit analysis, including profitability metrics from both the manufacturer and retailer's perspective, overall event spend, cost per incremental unit (CPIU), and so on. The Cost Benefit Review window displays these details for the actual promotion as it currently is. The Optimized - Cost Benefit Review window shows the details of the optimized promotion. If you accept the optimization, these details are moved to the actual promotion.



Here notice that the color of the Evt Status series (upper window only) indicates the optimization status of this promotion:

- White means that the promotion has not been optimized.
- Yellow means that the promotion has been optimized.
- Green means that the promotion has been optimized and accepted, so that the promotion is using the optimization results.

If you have not yet optimized this promotion, the Optimized - Cost Benefit Review window is empty.

Graphs

This worksheet also provides the following graphs:

- Sales Comparison**:** Compares the total event dollars generated before and after optimization.
- Incr Mfg Prft Comparison**:** Compares the incremental manufacturing profit generated before and after optimization. This is the additional profit that the manufacturer earns because of the promotion, in addition to the base profit that would be earned even without a promotion.

- Incr Rtl Prft Comparison**:** Compares the incremental retailer profit generated before and after running optimization. This is the additional profit that the retailer earns because of the promotion, in addition to the base profit that would be earned even without a promotion.

- Spend Comparison**:** Compares the event spend before and after running optimization.

If you have not yet optimized this promotion, each of these graphs includes only one bar, corresponding to the promotion in its current state.

Possible Actions

In this worksheet, depending on your authorization, you can do the following:

- Edit a promotion, by changing the sale price and other properties. You can also right-click a promotion and select Edit to access other properties.

- Run simulations. See Running a Simulation, page 10-3.

- Run or rerun optimization. See Optimizing a Promotion, page 10-4.

- Use the right-click menu to open other worksheets filtered to this promotion.

Accepting an Optimized Promotion

After you optimize a promotion, you can accept it. You can do this in any worksheet that displays promotions. For example, you can start in the PMO: Optimization Comparison worksheet.

> **Note:** This action has no effect on a promotion that has not been optimized.

To accept an optimized promotion

1. Right-click the promotion and select Methods > Accept Optimization.

   If you accept the optimization, the attributes of the optimized promotion are copied into the original promotion. Also notice that the color of the Evt Status series changes to green, to indicate that optimization has been accepted.

2. Optionally rerun simulation for a new net-lift analysis; see Running a Simulation, page 10-3.

3. Optionally right-click the promotion and launch either PMO: Promo Effect - Mfg or PMO: Promo Effect - Rtl.

See

- PMO: Examining and Comparing Promotions - .Examining Promotions from the Manufacturer's Point of View, page 11-2
- PMO: Examining and Comparing Promotions - Examining Promotions from the Retailer's Point of View, page 11-6.

Reference

PMO: Optimization Comparison

Basics

Accessing this worksheet	Right-click a promotion and click Open With > PMO: Optimization Comparison.
Levels you can select	Territory, Retailer, Promotion
Levels used in cross tabulation	Promotion Group, Scenario
Time aggregation	Yearly

Business Data

View	Series	Description
Event Planner	Start Ship	Date when product will start to ship
	End Ship	Date when shipments will end for the event
	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion
	Veh $	Vehicle cost for the promotion

View	Series	Description
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer
	Sale Price	Sale price per unit at shelf
	Buydown	Buydown allowance per unit, discount offered to retailer for running the event
	Lift	Lift factor for the promotion
	Base Evt Vol	Base volume during the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt Vol	Total volume for the promotion
Optimized - Event Planner	Start Ship	Date when product will start to ship
	End Ship	Date when shipments will end for the event
	Start Event O	Date when optimized promotion starts in stores
	# Wks O	Event length in whole weeks, assuming that each week starts on Monday, for optimized promotion
	Veh Type O	Vehicle type or event type of the optimized promotion
	Veh $ O	Vehicle cost for the optimized promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer
	Sale Price O	Sale price per unit at shelf, for the optimized promotion

View	Series	Description
	Buydown O	Buydown allowance per unit, for optimized promotion
	Lift O	Lift factor for the optimized promotion
	Base Evt Vol O	Base volume for optimized promotion
	Incr Evt Vol O	Incremental volume due to the optimized promotion
	Ttl Evt Vol O	Total volume for the optimized promotion
Cost Benefit Review	Base Evt $	Base sales for the manufacturer, during the promotion
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Mfg Profit	Manufacturer's profit from the event
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion
	Rtl Prft	Retailer's profit from the event
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Evt Spend exS	Total planned buydown and vehicle costs for promotion
	CPIU	Event cost per incremental unit sold as a result of the promotion.
	% Spend	Event spending, as a percentage of event sales
	Evt Status	Current status of the promotion

View	Series	Description
Optimized - Cost Benefit Review	Base Evt $ O	Base sales for manufacturer, for optimized promotion
	Incr Evt $ O	Incremental sales to the manufacturer due to the event, for the optimized promotion
	Ttl Evt $ O	Total sales during the promotion, for the manufacturer (for the optimized promotion)
	Mfg Prft O	Manufacturer's profit from the optimized event
	Incr Mfg Prft O	Incremental profit to the manufacturer due to the optimized promotion
	Rtl Prft O	Retailer's profit from the optimized event
	Incr Rtl Prft O	Incremental profit to the retailer due to the optimized promotion
	Evt Spend exS O	Total planned buydown and vehicle costs for optimized promotion
	CPIU O	Event cost per incremental unit sold as a result of the promotion, for optimized promotion
	% Spend O	Event spending, as a percentage of event sales, for optimized promotion
Sales Comparison	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Ttl Evt $ O	Total sales during the promotion, for the manufacturer (for the optimized promotion)
Incr Mfg Prft Comparison	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion
	Incr Mfg Prft O	Incremental profit to the manufacturer due to the optimized promotion

View	Series	Description
Incr Rtl Prft Comparison	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Incr Rtl Prft O	Incremental profit to the retailer due to the optimized promotion
Spend Comparison	Evt Spend exS	Total planned buydown and vehicle costs for promotion
	Evt Spend exS O	Total planned buydown and vehicle costs for optimized promotion

11

PMO: Examining and Comparing Promotions

This chapter covers the following topics:

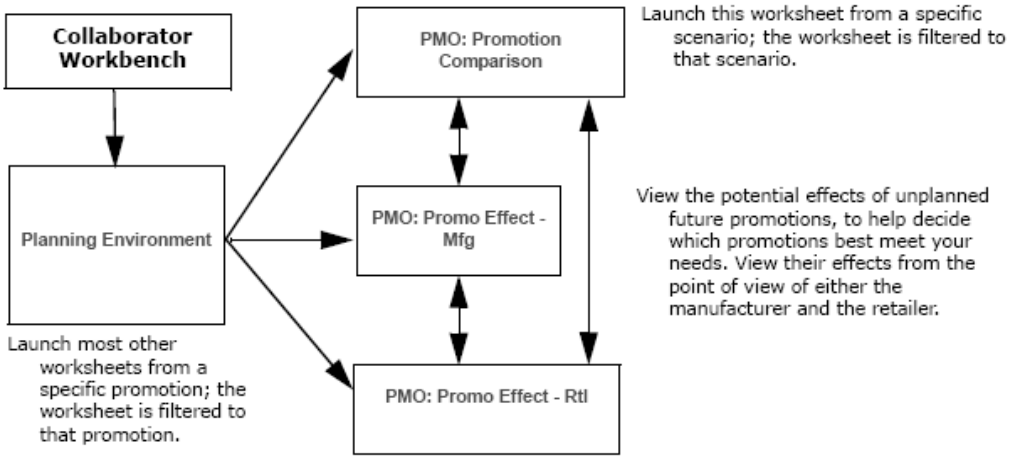
- Overview
- Examining Promotions from the Manufacturer's Point of View
- Examining Promotions from a Retailer's Point of View
- Comparing Promotions in a Scenario
- Reference

Overview

This chapter describes how to examine and compare promotions, to help you choose the best promotion for your needs. It includes the following sections:

Before you mark a promotion as planned (or before you commit a promotion), you generally examine the promotion to be sure you have chosen the best vehicle type and so on.

To evaluate promotions, you generally start in the Planning Environment worksheet. From there, you right-click a promotion and launch any of the relevant PMO worksheets to see data for that promotion.



Or, to compare multiple promotions, you right-click a scenario and launch a worksheet to view the promotions in that scenario side-by-side. As shown here, you can also open one worksheet from another, to look at the same promotion in a different way.

You may also want to run simulation, optimization, or both, as described in "PMO: Simulation and Optimization."

Examining Promotions from the Manufacturer's Point of View

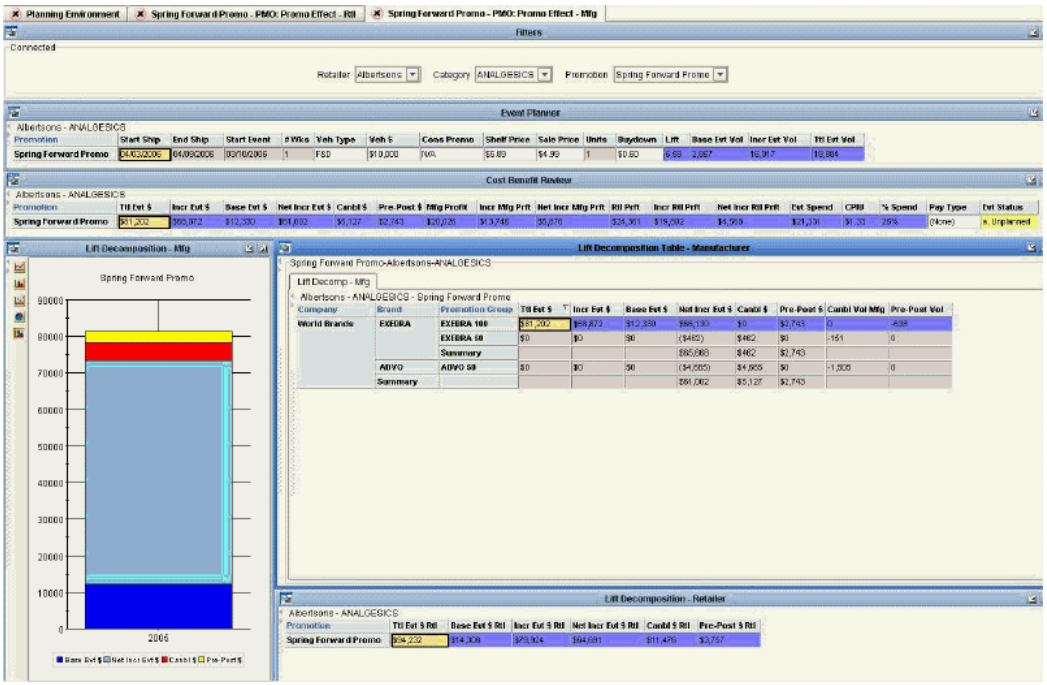
To evaluate a future promotion from the manufacturer's point of view

1. You typically start in the Planning Environment; see Introduction to the Planning Environment, page 9-1.

2. In the Event Planner window, right-click a promotion and click Open With > PMO: Promo Effect - Mfg.

3. If the worksheet does not show data immediately, click Data > Rerun. Or click the Run button.

The system displays the PMO: Promo Effect - Mfg worksheet, filtered to display just the promotion that you right-clicked.



This worksheet includes the following areas.

Event Planner

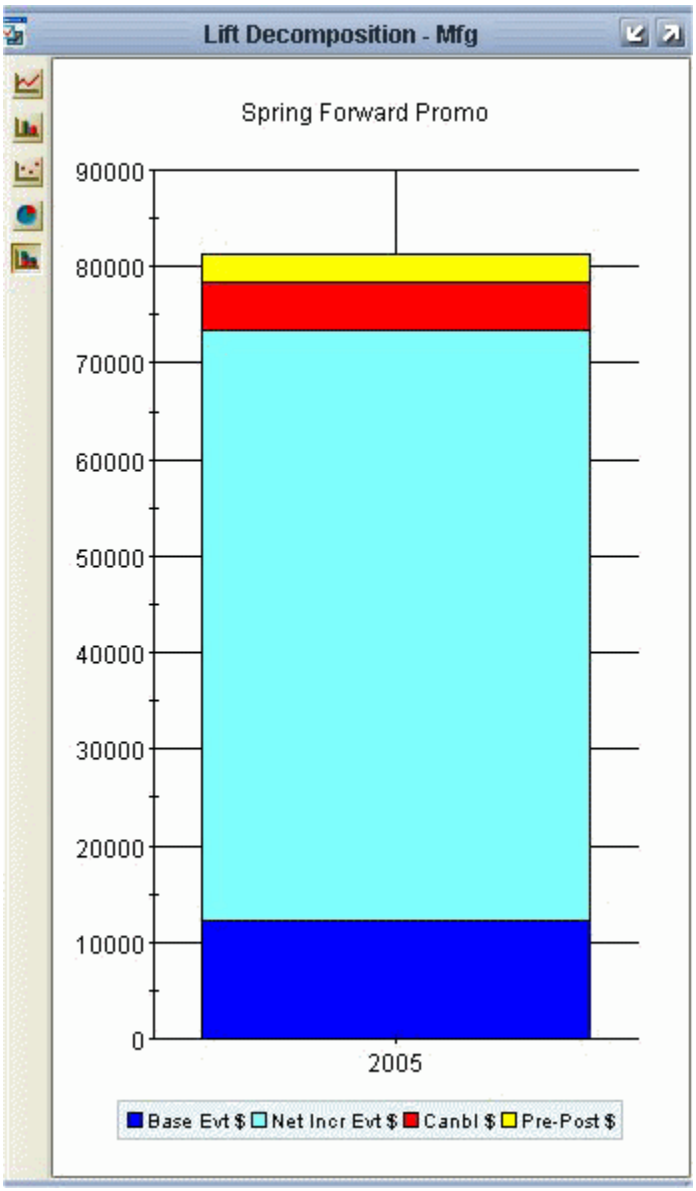
This window is the same as the Event Planner window in the Planning Environment worksheet. It displays details of all events, including start and end ship dates, vehicle type, vehicle cost, buydown, base volume and incremental volume.

Cost Benefit Review

This window is similar to the Cost Benefit Review window in the Planning Environment worksheet. It displays a detailed cost benefit analysis, including profitability metrics, overall event spend, and cost per incremental unit (CPIU).

Lift Decomposition Graph - Manufacturer

This window shows the effects of the promotion, from the perspective of the manufacturer.



Four series are shown here:

- Base Evt $ is the base money earned by the manufacturer over the course of the promotion. This money would have been earned even without the promotion.
- Net Incr Evt $ is the net additional money earned by the manufacturer as a result of the promotion; this accounts for both cannibalization and pre- and post-effects.
- Canbl $ is the money lost by the manufacturer due to cannibalistic effects of the promotion. For display purposes only, this is shown as a positive number so that it can be graphed.

- Pre-Post $ is the money lost by the manufacturer due to decreased sales before and after the promotion. For display purposes only, this is shown as a positive number so that it can be graphed.

The total height of the bar graph indicates how much money the manufacturer received in sales, *if cannibalization and pre- and post-effects were ignored*.

Lift Decomposition Table - Manufacturer

The Lift Decomposition table displays the same numbers as the preceding graph, but displays all promotion groups that were impacted by the selected promotion. Each promotion group is shown as a row; the blue row indicates the promotion group on which the selected promotion actually ran. This table also summarizes the effects across brands, and across companies, for convenient comparison.

Lift Decomposition Table - Manufacturer

Spring Forward Promo-Albertsons-ANALGESICS

Lift Decomp - Mfg

Albertsons - ANALGESICS - Spring Forward Promo

Company	Brand	Promotion Group	Ttl Evt $	Incr Evt $	Base Evt $	Net Incr Evt $	Canbl $	Pre-Post $	Canbl Vol Mfg	Pre-Post Vol
World Brands	EXEDRA	EXEDRA 100	$61,202	$66,872	$12,330	$66,130	$0	$2,743	0	-636
		EXEDRA 50	$0	$0	$0	($462)	$462	$0	-151	0
		Summary				$65,668	$462	$2,743		
	ADVO	ADVO 50	$0	$0	$0	($4,665)	$4,665	$0	-1,505	0
	Summary					$61,002	$5,127	$2,743		

For the promoted promotion group (Exedra 100), you can see the total event dollars, incremental event dollars, net incremental event dollars and so on, for the selected promotion. Note that for Exedra 100, there was zero dollars of cannibalization and $2743 of pre- and post-promotional effect.

On the other hand, examine the other promotion groups and notice that they were all cannibalized. Of course, for these promotion groups, there was zero direct lift, by definition, as the promotion did not run on them.

Here you can see these useful summaries:

- Total for promotion group where the promotion was run.
- Total effect on the brand.
- Total effect on the manufacturer.

Also notice that this table displays cannibalized and pre- and post-event volume, as well.

Lift Decomposition - Retailer

This table summarizes the cannibalization effects as seen by the retailer; see Examining Promotions from a Retailer's Point of View, page 11-6 for details.

Lift Decomposition - Retailer

Albertsons - ANALGESICS

Promotion	Ttl Evt $ Rtl	Base Evt $ Rtl	Incr Evt $ Rtl	Net Incr Evt $ Rtl	Canbl $ Rtl	Pre-Post $ Rtl
Spring Forward Promo	$94,232	$14,308	$79,924	$64,691	$11,476	$3,757

Possible Actions

In this worksheet, depending on your authorization, you can do the following:

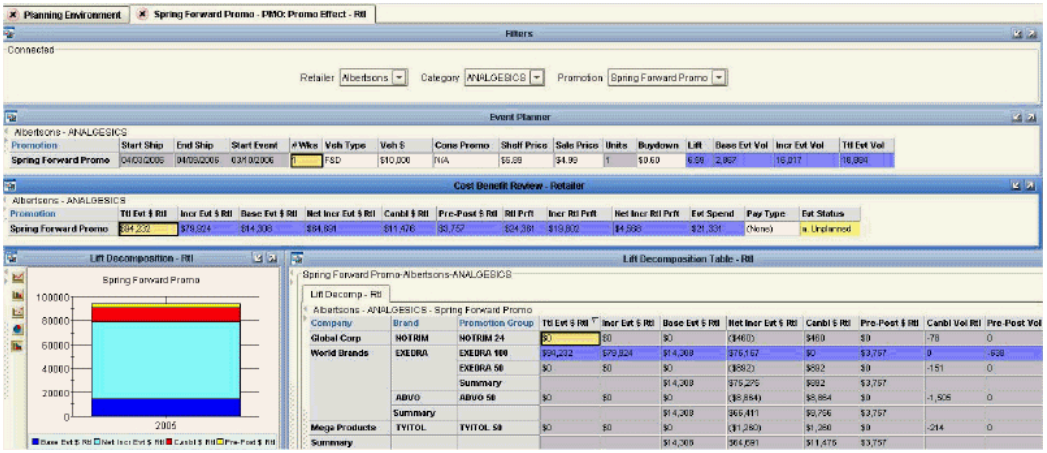
- Edit a promotion, by changing the sale price and other properties. You can also right-click a promotion and select Edit to access other properties.
- Run simulations. See Running a Simulation, page 10-3.
- Run optimization. See Optimizing a Promotion, page 10-4.
- Use the right-click menu to open other worksheets filtered to this promotion. For example, you can open the PMO: Promo Effect - Rtl worksheet to see the retailer's perspective. See Examining Promotions from a Retailer's Point of View, page 11-6.
- View aggregate information for the retailer at the bottom of the screen.

Examining Promotions from a Retailer's Point of View

To evaluate a future promotion from a retailer's point of view

1. You typically start in the Planning Environment; see "Introduction to the Planning Environment.
2. In the Event Planner window, right-click a promotion and click Open With > PMO: Promo Effect - Rtl.
3. If the worksheet does not show data immediately, click Data > Rerun. Or click the Run button.

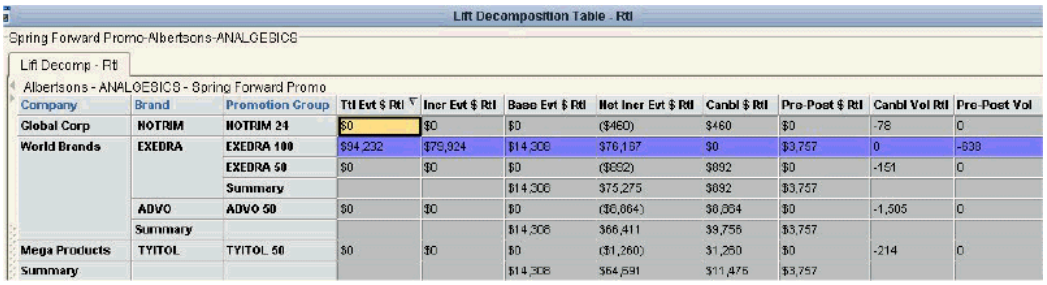
The system displays the PMO: Promo Effect - Rtl worksheet, filtered to display just the promotion that you right-clicked.



This worksheet includes the same areas as the PMO: Promo Effect - Mfg worksheet, but from the retailer's point of view rather than the manufacturer's.

Lift Decomposition Table - Retailer

The Lift Decomposition table displays all promotion groups that were impacted by the selected promotion, from the point of view of the retailer. Each promotion group is shown as a row; the blue row indicates the promotion group (Exedra 100) on which the selected promotion actually ran.



Lift Decomposition Table - Rtl

Spring Forward Promo-Albertsons-ANALGESICS

Lift Decomp - Rtl

Albertsons - ANALGESICS - Spring Forward Promo

Company	Brand	Promotion Group	Ttl Evt $ Rtl	Incr Evt $ Rtl	Base Evt $ Rtl	Net Incr Evt $ Rtl	Canbl $ Rtl	Pre-Post $ Rtl	Canbl Vol Rtl	Pre-Post Vol
Global Corp	NOTRIM	NOTRIM 24	$0	$0	$0	($460)	$460	$0	-78	0
World Brands	EXEDRA	EXEDRA 100	$94,232	$79,924	$14,308	$76,167	$0	$3,757	0	-938
		EXEDRA 50	$0	$0	$0	($892)	$892	$0	-151	0
		Summary			$14,308	$75,275	$892	$3,757		
	ADVO	ADVO 50	$0	$0	$0	($8,864)	$8,864	$0	-1,505	0
	Summary				$14,308	$66,411	$9,756	$3,757		
Mega Products	TYITOL	TYITOL 50	$0	$0	$0	($1,260)	$1,260	$0	-214	0
Summary					$14,308	$64,591	$11,476	$3,757		

Notice two promotion groups are listed here that were not seen in the manufacturer version: Notrim 24 and Tyitol 50. These promotion groups represent products that this retailer sells, but that are made by a different manufacturer. To the retailer, it is undesirable to cannibalize these promotion groups.

Here you can see these useful summaries:

- Total for promotion group where the promotion was run.
- Total effect on the brand.
- Total effect on each manufacturer.

Also notice that this table displays cannibalized and pre- and post-event volume, as well.

Possible Actions

In this worksheet, depending on your authorization, you can do the following:

- Edit a promotion, by changing the sale price and other properties. You can also right-click a promotion and select Edit to access other properties.
- Run simulations. See "Running a Simulation."
- Run optimization. See "Optmizing a Promotion."
- Use the right-click menu to open other worksheets filtered to this promotion. For example, you can open the PMO: Promo Effect - Mfg worksheet to see the manufacturer's perspective. See "Examining Promotions from the Manufacturer's Point of View." .

Comparing Promotions in a Scenario

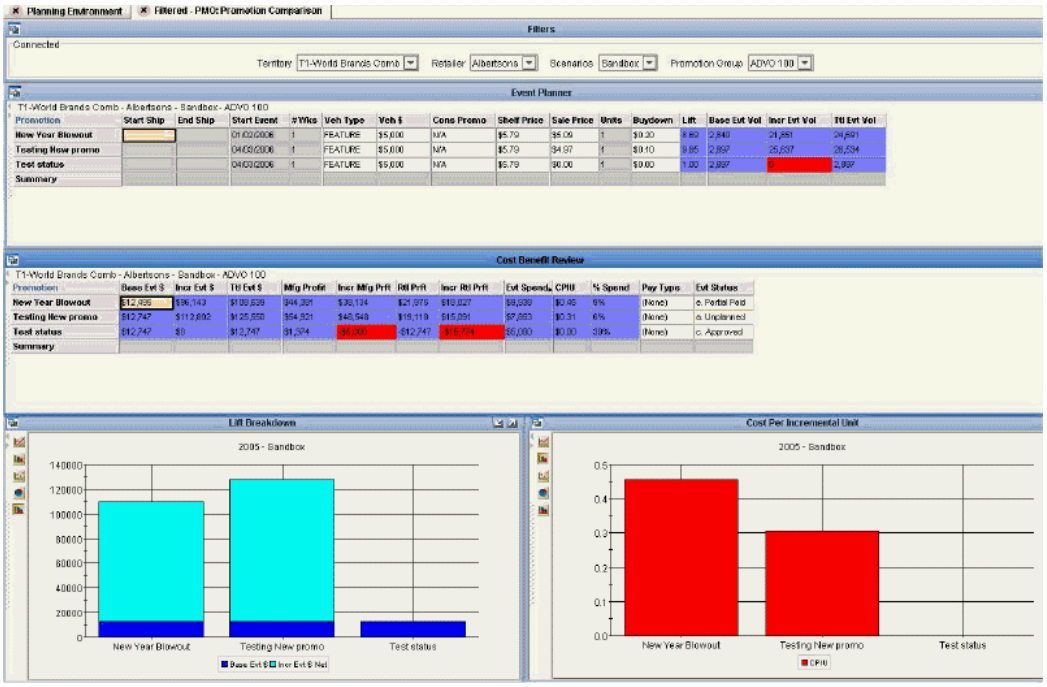
To determine how best to spend trade dollars, you can compare and evaluate multiple promotions in a scenario. Typically you create multiple unplanned promotions in the Sandbox scenario and then open the PMO: Promotion Comparison worksheet to view them side by side.

When you identify the best promotion, you can mark it as planned; see Marking a Promotion as Planned, page 9-8.

To compare promotions

1. You typically start in the Planning Environment; see "Introduction to the Planning Environment."
2. In the Event Planner window, right-click a scenario and click Open.
3. If the worksheet does not show data immediately, click Data > Rerun. Or click the Run button.

This launches the PMO: Promotion Comparison worksheet filtered to show the promotions of that scenario.



Now you can easily compare all events in the selected scenario. The screen now displays the following areas.

Event Planner

This window is the same as the Event Planner window in the Planning Environment worksheet. It displays details of all events, including start and end ship dates, vehicle type, vehicle cost, buydown, base volume and incremental volume. Incremental volume is generated by Oracle's comprehensive Analytical Engine.

Cost Benefit Review

This window is the same as the Cost Benefit Review window in the Planning Environment worksheet. It displays a detailed cost benefit analysis, including profitability metrics from both the manufacturer and retailer's perspective, overall event spend, cost per incremental unit (CPIU), payment type and price analysis (average retail vs. list).

Graphs

This worksheet displays the following graphs:

- Lift Breakdown: each event is shown as a separate bar.
- Cost Per Incremental Unit: each event is shown as a separate bar.

Possible Actions

In this worksheet, depending on your authorization, you can do the following:

- Edit a promotion, by changing the sale price and other properties. You can also right-click a promotion and select Edit to access other properties.
- Create new promotions; see Creating a Promotion, page 9-6.
- Delete a promotion; see Deleting a Promotion, page 9-16.
- Make a copy of a promotion; see Copying and Pasting a Promotion, page 9-15.
- Run simulations. See Running a Simulation, page 10-3.
- Run optimization. See Optimizing a Promotion, page 10-4.
- Right-click a promotion and open another worksheet filtered to that promotion. For example, you can open the PMO: Promo Effect - Rtl worksheet to see cannibalization from the retailer's perspective. See Examining Promotions from a Retailer's Point of View, page 11-6.
- Change the status of a promotion, as described in PMO: Planning Promotions - Introduction to the Planning Environment, page 9-1.

Reference

PMO: Promo Effect - Mfg

Basics

Accessing this worksheet	Right-click a promotion and click Open With > PMO: Promo Effect - Mfg.
Levels you can select	Retailer, Category, Promotion
Levels used in cross tabulation	Promotion
Time aggregation	Yearly

Business Data

View	Series	Description
Event Planner	Start Ship	Date when product will start to ship
	End Ship	Date when shipments will end for the event
	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion
	Veh $	Vehicle cost for the promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer
	Sale Price	Sale price per unit at shelf
	Units	Number of units in the deal to the consumer. Usually equal to 1. Use 2 for 2-for-1 sales, for example.
	Buydown	Buydown allowance per unit, discount offered to retailer for running the event
	Lift	Lift factor for the promotion
	Base Evt Vol	Base volume during the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt Vol	Total volume for the promotion

View	Series	Description
Cost Benefit Review	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Base Evt $	Base sales for the manufacturer, during the promotion
	Net Incr Evt $	Net revenue to the manufacturer, after considering cannibalization and pre- and post-effects
	Canbl $	Cannibalization dollars for the manufacturer
	Pre-Post $	Total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)
	Mfg Profit	Manufacturer's profit from the event
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion
	Net Incr Mfg Prft	Net incremental profit for the manufacturer, after considering cannibalization and pre- and post-effects
	Rtl Prft	Retailer's profit from the event
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
	Evt Spend	Total planned spending for promotion, sum of buydown, vehicle costs, and slotting

View	Series	Description
	CPIU	Event cost per incremental unit sold as a result of the promotion.
	% Spend	Event spending, as a percentage of event sales
Cost Benefit Review	Pay Type	Indicates the payment terms between the manufacturer and the retailer for this promotion
	Evt Status	Current status of the promotion
Lift Decomposition - Mfg	Base Evt $	Base sales for the manufacturer, during the promotion
	Net Incr Evt $	Net revenue to the manufacturer, after considering cannibalization and pre- and post-effects
	Canbl $	Cannibalization dollars for the manufacturer
	Pre-Post $	Total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)
Lift Decomposition Table - Manufacturer	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Base Evt $	Base sales for the manufacturer, during the promotion
	Net Incr Evt $	Net revenue to the manufacturer, after considering cannibalization and pre- and post-effects
	Canbl $	Cannibalization dollars for the manufacturer

View	Series	Description
	Pre-Post $	Total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)
	Canbl Vol Mfg	
	Pre-Post Vol	Total volume before and after the promotion, as a result of the promotion
Lift Decomposition - Retailer	Ttl Evt $ Rtl	Total sales during the promotion, for the retailer
	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Incr Evt $ Rtl	Incremental sales to the retailer due to the event
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre-Post $ Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)

PMO: Promo Effect - Rtl

Basics

Accessing this worksheet	Right-click a promotion and click Open With > PMO: Promo Effect - Rtl.
Levels you can select	Retailer, Category, Promotion
Levels used in cross tabulation	Promotion

Time aggregation	Yearly

Business Data

View	Series	Description
Event Planner	Start Ship	Date when product will start to ship
	End Ship	Date when shipments will end for the event
	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion
	Veh $	Vehicle cost for the promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer
	Sale Price	Sale price per unit at shelf
	Units	Number of units in the deal to the consumer. Usually equal to 1. Use 2 for 2-for-1 sales, for example.
	Buydown	Buydown allowance per unit, discount offered to retailer for running the event
	Lift	Lift factor for the promotion
	Base Evt Vol	Base volume during the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt Vol	Total volume for the promotion

View	Series	Description
Cost Benefit Review - Retailer	Ttl Evt $ Rtl	Total sales during the promotion, for the retailer
	Incr Evt $ Rtl	Incremental sales to the retailer due to the event
	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre-Post $ Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
	Rtl Prft	Retailer's profit from the event
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
	Evt Spend	Total planned spending for promotion, sum of buydown, vehicle costs, and slotting
	Pay Type	Indicates the payment terms between the manufacturer and the retailer for this promotion
	Evt Status	Current status of the promotion
Lift Decomposition - Rtl	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects

View	Series	Description
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre-Post $ Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
Lift Decomposition Table - Retailer	Ttl Evt $ Rtl	Total sales during the promotion, for the retailer
	Incr Evt $ Rtl	Incremental sales to the retailer due to the event
	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre-Post $ Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
	Canbl Vol Rtl	
	Pre-Post Vol	Total volume before and after the promotion, as a result of the promotion

PMO: Promotion Comparison

Basics

Accessing this worksheet	Right-click a scenario and click Open.

Levels you can select	Territory, Retailer, Promotion Group
Levels used in cross tabulation	Scenario, Promotion
Time aggregation	Yearly

Business Data

View	Series	Description
Event Planner	Start Ship	Date when product will start to ship
	End Ship	Date when shipments will end for the event
	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion
	Veh $	Vehicle cost for the promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer
	Sale Price	Sale price per unit at shelf
	Units	Number of units in the deal to the consumer. Usually equal to 1. Use 2 for 2-for-1 sales, for example.
	Buydown	Buydown allowance per unit, discount offered to retailer for running the event
	Lift	Lift factor for the promotion

View	Series	Description
	Base Evt Vol	Base volume during the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt Vol	Total volume for the promotion
Cost Benefit Review	Base Evt $	Base sales for the manufacturer, during the promotion
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Mfg Profit	Manufacturer's profit from the event
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion
	Rtl Prft	Retailer's profit from the event
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Evt Spend exS	Total planned buydown and vehicle costs for promotion
	CPIU	Event cost per incremental unit sold as a result of the promotion.
	% Spend	Event spending, as a percentage of event sales
	Pay Type	Indicates the payment terms between the manufacturer and the retailer for this promotion
	Evt Status	Current status of the promotion

View	Series	Description
Lift Breakdown	Base Evt $	Base sales for the manufacturer, during the promotion
	Incr Evt $ Net	
Cost Per Incremental Unit	CPIU	Event cost per incremental unit sold as a result of the promotion.

12

PMO: Reviewing Past Performance

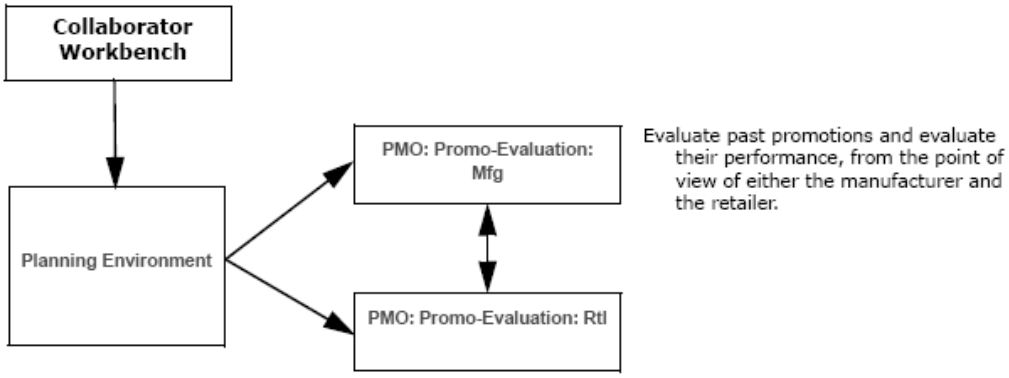
This chapter covers the following topics:

- Overview
- Evaluating Performance from the Manufacturer's Point of View
- Evaluating Performance from a Retailer's Point of View
- Viewing Actual Averages
- Reference

Overview

This chapter describes how to review past performance of your promotions. It includes the following sections:

To review the performance of past promotions, you generally start in the Planning Environment, page 9-1 worksheet. From there, you right-click a promotion and launch any of the relevant PMO worksheets to see data for that promotion.



Once a promotion has been planned and executed, it is useful to evaluate its performance against your original plan. The PMO: Promo-Evaluation: Mfg, page 12-9

and PMO: Promo-Evaluation: Rtl, page 12-9 worksheets provide a detailed post-promotional analysis of each individual promotion (that is, compare forecast to actual performance).

You can view the breakdown of each event with respect to the sales dollars and profit generated for the manufacturer. Depending on the detail of the historical data, a lift decomposition can be provided showing promotional effects such as the following:

- Cannibalization
- Pre and post effects, such as pantry loading

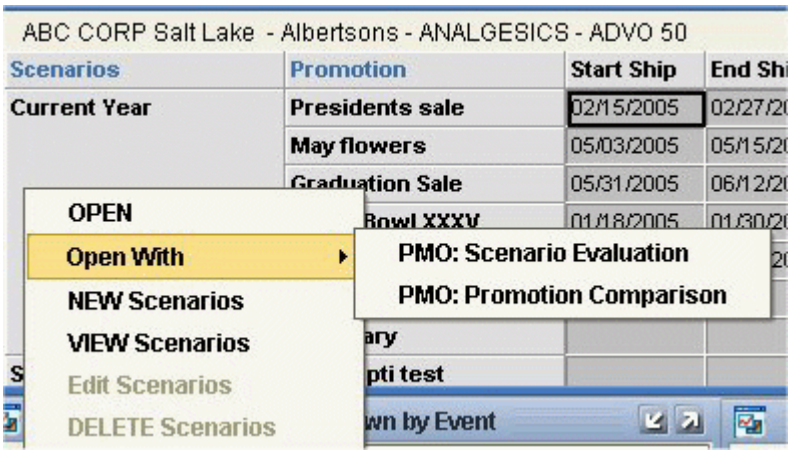
This will enable you to see your true "net lift" and revised financial figures in order to properly evaluate the event's performance and uncover its true profitability.

Evaluating Performance from the Manufacturer's Point of View

To evaluate a past promotion from the manufacturer's point of view

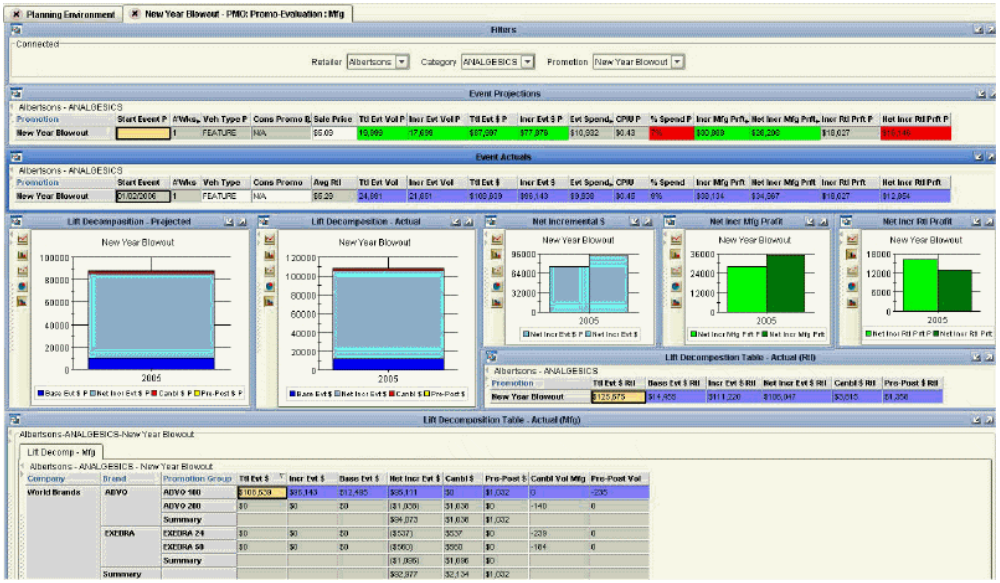
1. You typically start in the Planning Environment; see Introduction to the Planning Environment, page 9-1.

2. In the Event Planner window, right-click a promotion and click Open With > PMO: Promo-Evaluation: Mfg.



3. If the worksheet does not show data immediately, click Data > Rerun. Or click the Run button.

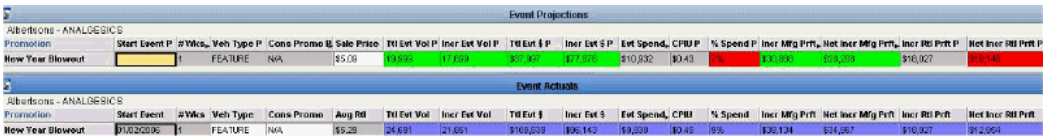
   The system displays the PMO: Promo-Evaluation: Mfg worksheet, filtered to display just the promotion that you right-clicked.



The PMO: Promo-Evaluation: Mfg worksheet includes the following windows.

Event Projections and Event Actuals

These windows compare the projections and the actuals, one directly above the other. Notice that the actuals are displayed mostly in blue.



The Event Projections window displays planned event details, including event start, vehicle type, total planned volume, anticipated manufacturer profit and anticipated spend. For the series in this window, PTP uses colors to indicate deviations between the projections and the actuals:

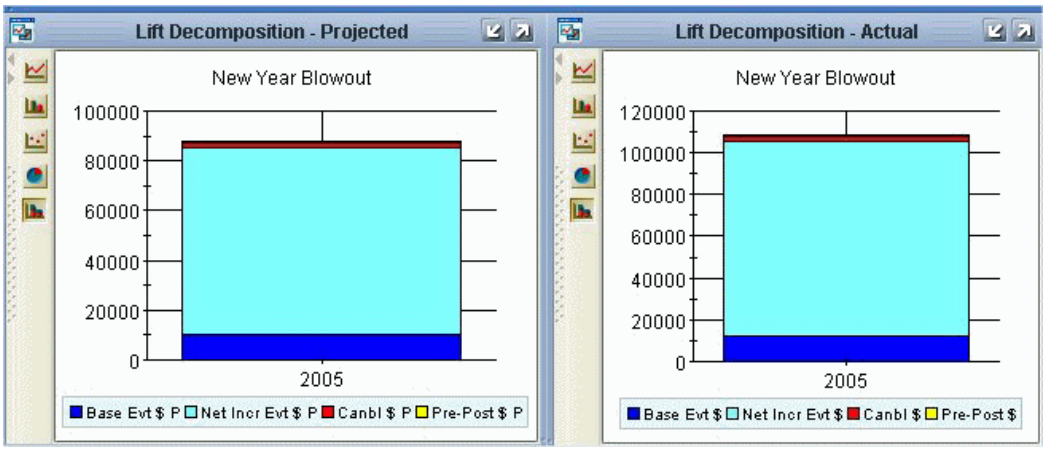
- If the actual value is more than 20% different from the projection in the undesirable sense, the projection is shown in red.
- If the actual value is more than 20% different from the projection in the desirable sense, the projection is shown in green. For example, if the actual profit was 130% of the projected profit, the projection is shown in green.

The Event Actuals window shows the corresponding actuals.

Lift Decomposition Graphs

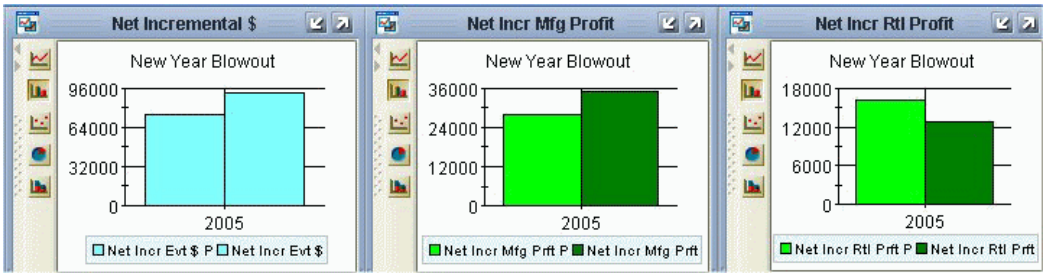
This worksheet also displays lift decomposition graphs showing the projected

breakdown and the actual breakdown.



Net Incremental Graphs

The worksheet includes the following graphs to show the net incremental dollars earned for this promotion; each graph compares the projection to the actual. The first graph shows the net incremental dollars. The second and third graphs show the net incremental profit to the manufacturer and retailer, respectively. The net incremental profit is the net additional profit that is earned because of the promotion, in addition to the baseline profit.



Lift Decomposition Table Actual (Manufacturer)

The lift decomposition table shows the specific breakdown into base, incremental, cannibalization, and pre- and post-effect dollars. This table also shows the net incremental volume for the event. This table applies to the manufacturer's point of view.

Lift Decomposition Table - Actual (Mfg)

Albertsons-ANALGESICS-New Year Blowout

Lift Decomp - Mfg

Albertsons - ANALGESICS - New Year Blowout

Company	Brand	Promotion Group	Ttl Evt $	Incr Evt $	Base Evt $	Net Incr Evt $	Canbl $	Pre-Post $	Canbl Vol Mfg	Pre-Post Vol
World Brands	ADVO	ADVO 100	$108,639	$96,143	$12,495	$95,111	$0	$1,032	0	-235
		ADVO 200	$0	$0	$0	($1,038)	$1,038	$0	-140	0
		Summary				$94,073	$1,038	$1,032		
	EXEDRA	EXEDRA 24	$0	$0	$0	($537)	$537	$0	-239	0
		EXEDRA 50	$0	$0	$0	($560)	$560	$0	-184	0
		Summary				($1,096)	$1,096	$0		
	Summary					$92,977	$2,134	$1,032		

Possible Actions

In this worksheet, depending on your authorization, you can do the following:

Right-click a promotion and open another worksheet filtered to that promotion. For example, you can open the PMO: Promo-Evaluation: Rtl worksheet to see past performance from the retailer's perspective. See Evaluating Performance from a Retailer's Point of View, page 12-5.

Evaluating Performance from a Retailer's Point of View

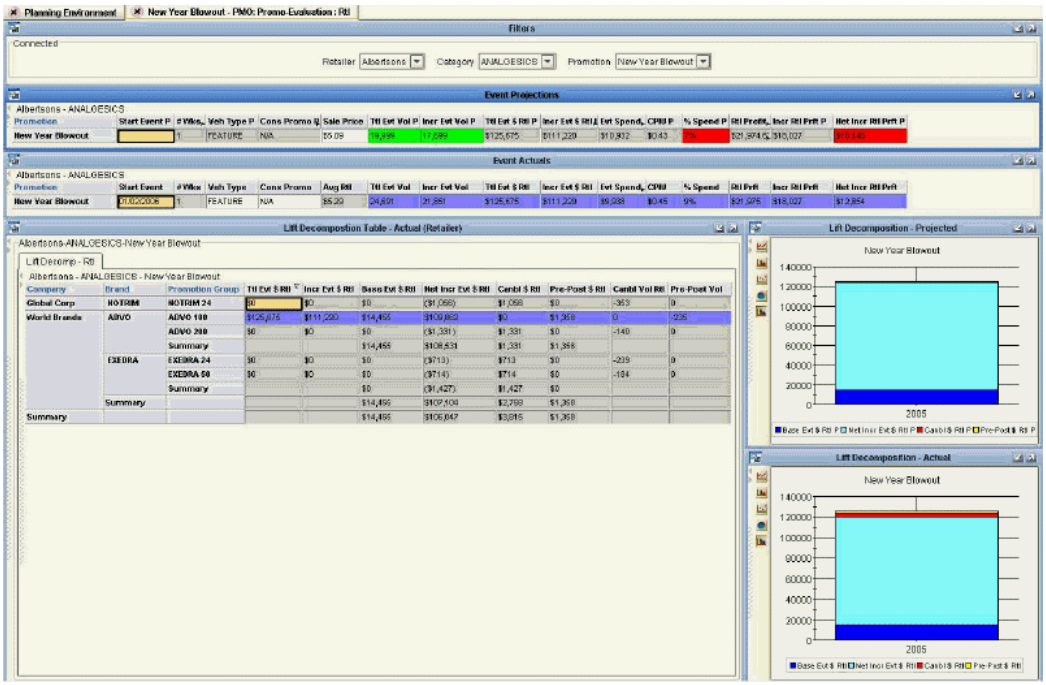
To evaluate a past promotion from a retailer's point of view

1. You typically start in the Planning Environment; see Introduction to the Planning Environment, page 9-1.

2. In the Event Planner window, right-click a promotion and click Open With > PMO: Promo-Evaluation: Rtl

3. If the worksheet does not show data immediately, click Data > Rerun. Or click the Run button.

The system displays the PMO: Promo-Evaluation: Rtl worksheet, filtered to display just the promotion that you right-clicked.



This worksheet contains some of the same areas as the PMO: Promo-Evaluation: Mfg worksheet, but from the retailer's point of view rather than the manufacturer's.

Event Projections and Event Actuals

These windows compare the projections and the actuals, one directly above the other. Notice that the actuals are displayed mostly in blue.

The Event Projections window displays planned event details, including event start, vehicle type, total planned volume, anticipated retailer profit and anticipated spend. For the series in this window, PTP uses colors to indicate deviations between the projections and the actuals:

- If the actual value is more than 20% different from the projection in the undesirable sense, the projection is shown in red.
- If the actual value is more than 20% different from the projection in the desirable sense, the projection is shown in green. For example, if the actual profit was 130% of the projected profit, the projection is shown in green.

The Event Actuals window shows the corresponding actuals.

Lift Decomposition Table - Actual (Retailer)

The lift decomposition table shows the specific breakdown into base, incremental, cannibalization, and pre- and post-effect dollars. This table also shows the net incremental volume for the event. This table applies to the retailer's point of view.

Lift Decompostion Table - Actual (Retailer)

Albertsons-ANALGESICS-New Year Blowout

Lift Decomp - Rtl

Albertsons - ANALGESICS - New Year Blowout

Company	Brand	Promotion Group	Ttl Evt $ Rtl	Incr Evt $ Rtl	Base Evt $ Rtl	Net Incr Evt $ Rtl	Canbl $ Rtl	Pre-Post $ Rtl	Canbl Vol Rtl	Pre-Post Vol
Global Corp	NOTRIM	NOTRIM 24	$0	$0	$0	($1,056)	$1,056	$0	-353	0
World Brands	ADVO	ADVO 100	$125,675	$111,220	$14,455	$109,862	$0	$1,358	0	-235
		ADVO 200	$0	$0	$0	($1,331)	$1,331	$0	-140	0
		Summary			$14,455	$108,531	$1,331	$1,358		
	EXEDRA	EXEDRA 24	$0	$0	$0	($713)	$713	$0	-239	0
		EXEDRA 50	$0	$0	$0	($714)	$714	$0	-184	0
		Summary			$0	($1,427)	$1,427	$0		
	Summary				$14,455	$107,104	$2,758	$1,358		
Summary					$14,455	$106,047	$3,815	$1,358		

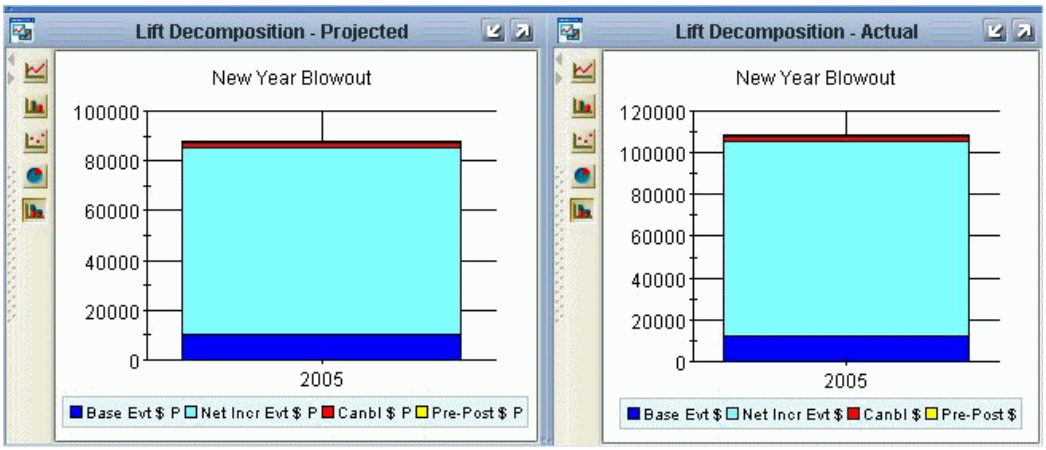
Here you can see these useful summaries:

- Total for promotion group where the promotion was run.
- Total effect on the brand.
- Total effect on each manufacturer.

Also notice that this table displays cannibalized and pre- and post-event volume, as well.

Lift Decomposition Graphs

The worksheet includes two graphs to show the projected lift decomposition and the actual lift decomposition. These are displayed vertically in the worksheet for space reasons. For convenience here, the documentation displays them side by side.



Possible Actions

In this worksheet, depending on your authorization, you can do the following:

Right-click a promotion and open another worksheet filtered to that promotion. For example, you can open the PMO: Promo-Evaluation: Mfg worksheet to see past performance from the manufacturer's perspective. See Evaluating Performance from the Manufacturer's Point of View, page 12-2.

Viewing Actual Averages

It is often useful to review actuals and see average information for different kinds of promotions.

> **Note:** Some of this data is highly aggregated, so some tabs may come up slowly.

To view average history

In My Worksheets (in Collaborator Workbench), click PMO: Promotion History.

The worksheet is displayed as follows:

Unlike other worksheets, this worksheet is designed as a series of tabs, each of which

displays the same averages, for different contexts. For example, on this tab, you select a retailer and category. The table shows averages for that retailer and category. Each row in the table corresponds to a type of promotion, so you see these averages broken out by promotion type.

Each average is computed on a weekly basis. For example, Avg Ttl Evt Vol is the average total event volume for a single week.

Reference

PMO: Promo-Evaluation: Mfg

This worksheet compares projections to actuals for a past promotion, from the point of view of the manufacturer:

Basics

Accessing this worksheet	Right-click a promotion and click Open With > PMO: Promo-Evaluation: Mfg.
Levels you can select	Retailer, Category, Promotion
Levels used in cross tabulation	Promotion
Time aggregation	Yearly

Business Data

View	Series	Description
Event Projections	Start Event P	Projected date when promotion starts in stores
	# Wks P	Projected event length in whole weeks, assuming that each week starts on Monday.
	Veh Type P	Projected vehicle type or event type of the promotion
	Cons Promo P	Projected consumer overlay.

View	Series	Description
	Sale Price	Sale price per unit at shelf
	Ttl Evt Vol P	Projected total volume for the promotion
	Incr Evt Vol P	Projected incremental volume due to the promotion
	Ttl Evt $ P	Projected total sales during the promotion, for the manufacturer
	Incr Evt $ P	Projected incremental sales to the manufacturer due to the event
	Evt Spend exS P	Projected total planned buydown and vehicle costs for promotion
	CPIU P	Projected event cost per incremental unit sold as a result of the promotion.
	% Spend P	Projected event spending, as a percentage of event sales
	Incr Mfg Prft P	Projected incremental profit to the manufacturer due to the promotion
	Net Incr Mfg Prft P	Projected net incremental profit for the manufacturer
	Incr Rtl Prft P	Projected incremental profit to the retailer due to the promotion
Event Projections	Net Incr Rtl Prft P	Projected net incremental profit for the retailer
Event Actuals	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion

View	Series	Description
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Avg Rtl	Average unit retail price at shelf
	Ttl Evt Vol	Total volume for the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Evt Spend exS	Total planned buydown and vehicle costs for promotion
	CPIU	Event cost per incremental unit sold as a result of the promotion.
	% Spend	Event spending, as a percentage of event sales
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion
	Net Incr Mfg Prft	Net incremental profit for the manufacturer, after considering cannibalization and pre- and post-effects
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
Lift Decomposition - Projected	Base Evt $ P	Projected base sales for the manufacturer, during the promotion
	Net Incr Evt $ P	Projected net revenue to the manufacturer

View	Series	Description
	Canbl $ P	Projected cannibalization dollars for the manufacturer
	Pre-Post $ P	Projected total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)
Lift Decomposition - Actual	Base Evt $	Base sales for the manufacturer, during the promotion
	Net Incr Evt $	Net revenue to the manufacturer, after considering cannibalization and pre- and post-effects
	Canbl $	Cannibalization dollars for the manufacturer
	Pre-Post $	Total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)
Net Incremental $	Net Incr Evt $ P	Projected net revenue to the manufacturer
	Net Incr Evt $	Net revenue to the manufacturer, after considering cannibalization and pre- and post-effects
Net Incr Mfg Profit	Net Incr Mfg Prft P	Projected net incremental profit for the manufacturer
	Net Incr Mfg Prft	Net incremental profit for the manufacturer, after considering cannibalization and pre- and post-effects
Net Incr Rtl Profit	Net Incr Rtl Prft P	Projected net incremental profit for the retailer
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
LIft Decompostion Table - Actual	Ttl Evt $ Rtl	Total sales during the promotion, for the retailer

View	Series	Description
(Retailer)	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Incr Evt $ Rtl	Incremental sales to the retailer due to the event
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre-Post $ Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
Lift Decomposition Table - Actual (Mfg)	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Base Evt $	Base sales for the manufacturer, during the promotion
	Net Incr Evt $	Net revenue to the manufacturer, after considering cannibalization and pre- and post-effects
	Canbl $	Cannibalization dollars for the manufacturer
	Pre-Post $	Total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)
	Canbl Vol Mfg	
	Pre-Post Vol	Total volume before and after the promotion, as a result of the promotion

PMO: Promo-Evaluation: Rtl

This worksheet compares projections to actuals for a past promotion, from the point of

view of the retailer:

Basics

Accessing this worksheet	Right-click a promotion and click Open With > PMO: Promo-Evaluation: Rtl.
Levels you can select	Retailer, Category, Promotion
Levels used in cross tabulation	Promotion
Time aggregation	Yearly

Business Data

View	Series	Description
Event Projections	Start Event P	Projected date when promotion starts in stores
	# Wks P	Projected event length in whole weeks, assuming that each week starts on Monday.
	Veh Type P	Projected vehicle type or event type of the promotion
	Cons Promo P	Projected consumer overlay.
	Sale Price	Sale price per unit at shelf
	Ttl Evt Vol P	Projected total volume for the promotion
	Incr Evt Vol P	Projected incremental volume due to the promotion
	Ttl Evt $ Rtl P	Projected total sales during the promotion, for the retailer
	Incr Evt $ Rtl P	Projected incremental sales to the retailer due to the event

View	Series	Description
	Evt Spend exS P	Projected total planned buydown and vehicle costs for promotion
	CPIU P	Projected event cost per incremental unit sold as a result of the promotion.
	% Spend P	Projected event spending, as a percentage of event sales
	Rtl Profit P	Projected retailer's profit from the event
	Incr Rtl Prft P	Projected incremental profit to the retailer due to the promotion
	Net Incr Rtl Prft P	Projected net incremental profit for the retailer
Event Actuals	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Avg Rtl	Average unit retail price at shelf
	Ttl Evt Vol	Total volume for the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt $ Rtl	Total sales during the promotion, for the retailer
	Incr Evt $ Rtl	Incremental sales to the retailer due to the event

View	Series	Description
	Evt Spend exS	Total planned buydown and vehicle costs for promotion
	CPIU	Event cost per incremental unit sold as a result of the promotion.
	% Spend	Event spending, as a percentage of event sales
	Rtl Prft	Retailer's profit from the event
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
Lift Decomposition Table - Actual (Retailer)	Ttl Evt $ Rtl	Total sales during the promotion, for the retailer
	Incr Evt $ Rtl	Incremental sales to the retailer due to the event
	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre-Post $ Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
	Canbl Vol Rtl	

View	Series	Description
	Pre-Post Vol	Total volume before and after the promotion, as a result of the promotion
Lift Decomposition - Projected	Base Evt $ Rtl P	Projected base sales for the retailer, during the promotion
	Net Incr Evt $ Rtl P	Projected net revenue to the retailer
	Canbl $ Rtl P	Projected cannibalization dollars for the retailer
	Pre-Post $ Rtl P	Projected total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
Lift Decomposition - Actual	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre-Post $ Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)

PMO: Promotion History

This worksheet displays the past averages for each promotion type, in a number of different contexts.

Basics

Accessing this worksheet	In My Worksheets (in Collaborator Workbench), click PMO: Promotion History. If a worksheet is currently open, click File > Open. Click PMO: Promotion History and then click Open.

Levels you can select	Different for each tab of this worksheet.
Levels used in cross tabulation	Promotion Type
Time aggregation	Yearly

Business Data

Each view in this worksheet contains the same set of series:

Series	Description
Avg Rtl	Average unit retail price at shelf
Avg % Disc	Average percent discount
Avg B Dwn	Average buydown for the event
Avg Ttl Evt Vol	Average weekly total event volume
Avg Incr Evt Vol	Average weekly incremental event volume
Avg Lift	Average lift factor for promotion
Avg Ttl Evt $	Average weekly total event dollars for manufacturer
Avg Incr Evt $	Average weekly incremental event dollars for manufacturer
Avg Mfg Prft	Average weekly manufacturer profit
Avg Incr Mfg Prft	Average weekly incremental manufacturer profit
Avg Rtl Prft	Average weekly retailer profit
Avg Inc Rtl Prft	Average weekly incremental retailer profit
Avg Rtl Margin	Average retailer event margin
Avg Evt Spend	Average weekly event spend
Avg CPIU	Average cost per incremental unit

Series	Description
Avg % Spend	Average percent spend

Part 3

Advanced Topics

13

Creating Worksheets and Content Panes

This chapter covers the following topics:

- Introduction
- Working with Lists
- Creating or Editing a Worksheet or Content Pane
- Configuring the Basics
- Selecting Series on a Worksheet
- Managing the Series Lists
- Specifying the Time Resolution and Time Span
- Specifying Aggregation Levels
- Using the Advanced Selection Options
- Changing the Overall Scale or Unit of Measure
- Filtering the Worksheet or Content Pane
- Managing the List of Members
- Applying Exception Filters
- Defining the View Layout
- Adding and Managing Worksheet Views
- Specifying the Worksheet Elements in a View
- Displaying an Embedded Worksheet
- Filtering a Worksheet View
- Sharing Worksheet and Content Panes
- Deleting Worksheet or Content Panes
- General Tips on Worksheet Design

Introduction

This chapter describes how to create and redefine worksheets and content panes.

To create or redefine worksheets and content panes, you use the worksheet editor, which is divided into multiple screens. This section provides a quick overview:

Area	Purpose	For details, see
Display	Specify basic information.	Configuring the Basics, page 13-4
Series	Select series to include.	Selecting Series on a Worksheet, page 13-6
Time	Specify time resolution of worksheet or content pane and span of time to consider.	Specifying the Time Resolution and Time Span, page 13-9
Aggregation Levels	Optionally specify aggregation levels to include.	Specifying Aggregation Levels, page 13-11
Filters	Optionally filter the selected combinations.	Filtering a Worksheet View, page 13-26
Exceptions	Optionally apply exception filters to further filter the combinations.	Applying Exception Filters, page 13-18
Layout Designer	Applicable only to worksheets. Define the layout of the worksheet and its views, including the layout of the worksheet tables, the location of each included series, and the graph format.	Defining the View Layout, page 13-20

Within the editor, you have the following options:

- To move to another page, either click a button on the left side of the page or click Previous or Next.
- To exit the worksheet editor and keep your changes, click OK.
- To exit the worksheet editor and discard all changes, click Cancel.

Working with Lists

As you create or edit worksheets and content panes, you will often use pages that present two lists of elements, where you specify your selections. To do so, you move elements from the left list to the right list. The left list always presents the available elements (such as the available series) and the right list always shows your selections.

You can move elements from one list to the other in many equivalent ways, summarized here:

- To move all elements from one list to the other, click one of the double arrow buttons, as appropriate.
- To move a single element from one list to the other, click the element and then click one of the single arrow buttons, as appropriate. Or double-click the element.
- To move several adjacent elements, click the first element, press Shift and click the last element. Then click one of the single arrow buttons, as appropriate.
- To move several elements that are not adjacent, press Ctrl and click each element you want. Then click one of the single arrow buttons, as appropriate.

Creating or Editing a Worksheet or Content Pane

To create a new worksheet or content pane

Click File > New. Or click the New button.

To edit an existing worksheet or content pane

1. Click File > Open. Or click the Open button.
2. Click a worksheet or content pane and click Open.
3. Click the Worksheet menu and select one of the menu items. Or click one of the worksheet buttons on the tool bar.
4. Save your changes to the worksheet definition: To save the new definition, click the Save button. Or click File > Save

   Note: In contrast, the Data > Update option saves the data and notes in the worksheet, not the worksheet definition.

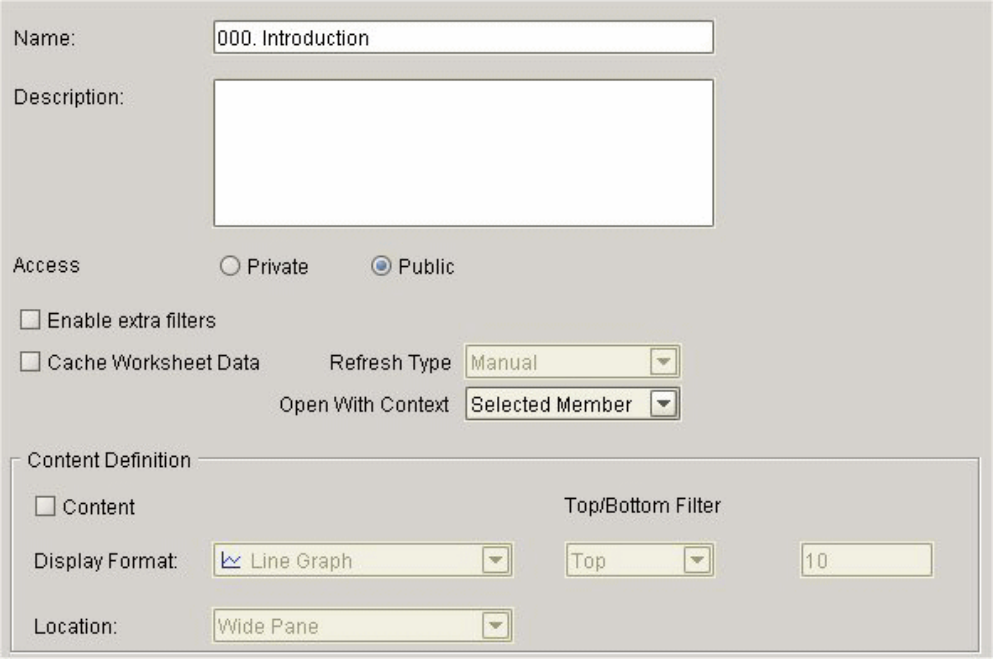
   To save the worksheet with a new name, click the Save As button.

Configuring the Basics

To configure basic information for a worksheet or content pane:

1. Click Worksheet > Display. Or click the Display button.

   The system displays a page where you specify the following basic information



Name	The title to use in the My Worksheets module and in the window title.
Description	Provides optional information to display in My Worksheets. This is especially useful in public worksheets for explaining the purpose of the worksheet to other users.
Access	Select Private or Public. Private is for your use only. Public worksheets and content panes are available to all users in the group.

Enable Extra Filters	This option adds an extra, user-controlled filter to the worksheet. If you select the Enable Extra Filters check box, that means that when you open the worksheet, you can prefilter the data before seeing the worksheet results; this is especially useful for users who use Demantra Anywhere. Normally when you specify aggregation levels to include in the worksheet, as described in "Specifying Aggregation Levels", all members of those levels are available in the worksheet. If you select the Enable Extra Filters check box, that means that when you run the worksheet, Demantra first prompts you to select the members to display for each level. This option has no effect on content panes.
Cache Worksheet Data	Specifies whether Demantra should cache the data for this worksheet, for each user who works with it. If you cache a worksheet, it will run more quickly in general, but the cache will need to be refreshed periodically. Choose one of the following refresh options: • Manual—users will have to manually refresh the cache. • Automatic—Demantra will automatically refresh the cache, as specified by your implementors. In either case, Demantra automatically detects when a cache is out of date and behaves appropriately. Demantra also automatically refreshes the cache when you make certain structural changes to the worksheet.
Open With Context	Specifies how this worksheet should be filtered when a user opens it via the Open or Open With menu options (on the right-click menu). Choose one of the following options: • Selected Member (this will filter the worksheet to the object from which it was launched, aggregating across all combinations associated with that object) • Selected Combination (this will filter the worksheet to the combination from which it was launched)

2. To display the content of this worksheet as a content pane in Collaborator Workbench, check Content and then complete the following fields:

Display Format	Specifies the display format to use. Not all display formats may be possible, depending on the number of levels and series you include. Currently, Collaborator Workbench chooses the color to use for each series, when displaying series in the graph-type content panes.
Location	Select Wide Pane or Narrow Pane to determine where the content pane will be displayed in Collaborator Workbench.
Top/Bottom Filter	(Only for bar chart content panes.) Specifies how to filter the members or combinations for display in the bar chart (to save space, not all members are shown). • Use the dropdown menu to specify whether the filter should apply to the top-ranked or to bottom-ranked members. • In the input field, specify the number of members to be included. • For Criteria Series, select the series that Demantra should use to rank the members. (This does not control the order in which they are displayed in the chart.) **Note:** If multiple items have identical values, all of them are displayed, and they collectively count as 1 towards the total. For example, suppose top values were 200, 150, 150, 100, and 50. If you specified Top/Bottom filter as three, you would see a total of four items: both the 150 items, in addition to the 200 and 100 items. This option does not affect the worksheet.

3. For worksheets only, to specify how the table should appear, see Defining the View Layout, page 13-20.

Selecting Series on a Worksheet

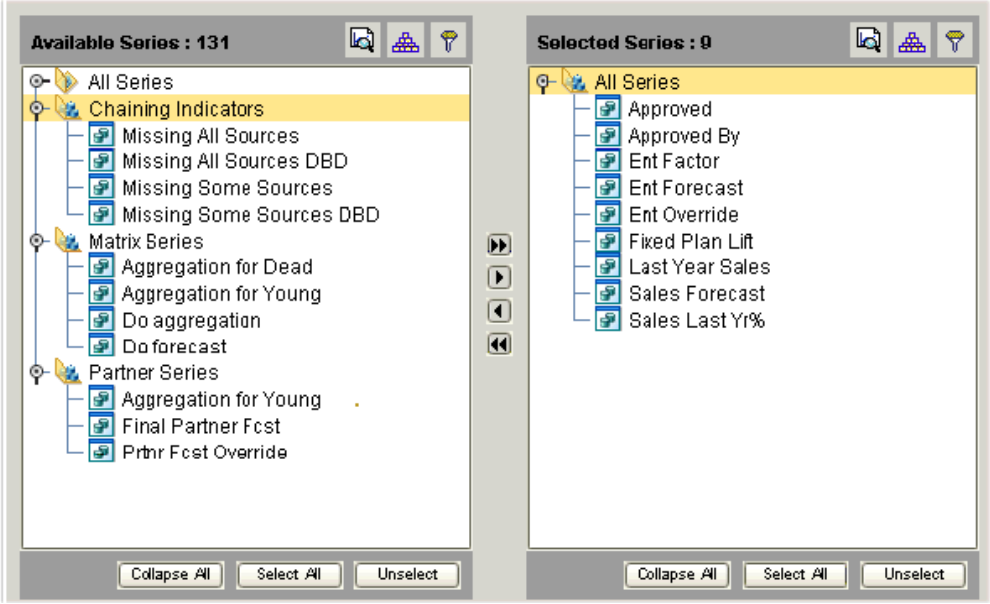
Every worksheet or content pane must include at least one series.

> **Note:** If you use a settlement level in a worksheet or content pane, all series in the worksheet or content pane must refer to tables used by the settlement hierarchy.

To specify the series on a worksheet or content pane:

1. Click Worksheet > Series. Or click the Series button.

   The system displays the Available Series and Selected Series lists. Each list is a collapsible list of series groups and the series in them.



2. Move all series that you want into the Selected Series list. To do so, either double-click each series or drag and drop it. You can also move an entire series group from one list to the other in the same way.

3. Remove any series from the Selected Series list that you do not want to include.

   Note: You cannot remove a series if it is used as the Criteria Series for bar chart content.

   To change the order in which the series are displayed, see Defining the View Layout, page 13-20.

   See Managing the Series Lists, page 13-7.

Managing the Series Lists

You may have a very large number of series, and it can be useful to sort and filter these lists so that you can readily find what you need. The system also provides a search mechanism.

Note: This section applies only to the series page of the worksheet editor (Worksheet > Series).

To sort a list of series:

1. Click the Sort button.

   The Sort dialog box is displayed.

2. Drag the list name from the Available Columns to the Sort Columns. Or double-click the list name in the Available Columns list.

3. Click OK.

To filter a list of series:

1. Click the Filter button.

   The Filter page appears.

2. Click Add.

3. Click the arrow to the right of the operator box and select an operator from the dropdown list.

4. In the number box, enter the value by which to filter the list.

5. (Optional) You can filter further by using the AND relationship.

6. Click OK.

To find a series:

1. Click the Find button.

   The Find dialog box appears.

2. In the Find where box, select the name of the list to search.

3. In the Find what box, type name of the series.

4. Select Up, Down or All to determine the direction of the search.

5. (Optional) Select one or more of the check boxes:

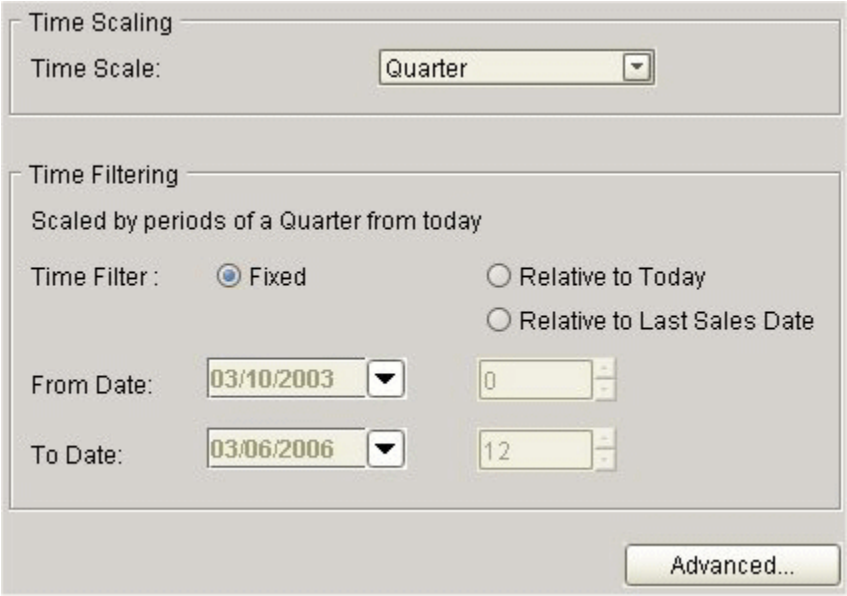
   - Whole Word: Search for the exact match of a word.

   - Match Case: Search for the exact match of a word (case sensitive).

6. Click Find Next to begin (or continue) searching.

Specifying the Time Resolution and Time Span

Each worksheet or content pane selects data for a specified span of time and optionally aggregates it in time. You use the Time dialog box to specify the time resolution and span of time of the results.



To specify time criteria:

1. Click Worksheet > Time. Or click the Time button.

2. In the Time Scale box, specify the time resolution. The data in the worksheet or content pane is aggregated to this time resolution. That is, this option specifies the period of time that each data point in the line graph represents.

3. In the Time Filter box, specify the time period to which the worksheet or content pane applies:

   - Fixed if you always want to show a specific time range, regardless of the current date.

   - Relative to Today if you always want to show a time range relative to today.

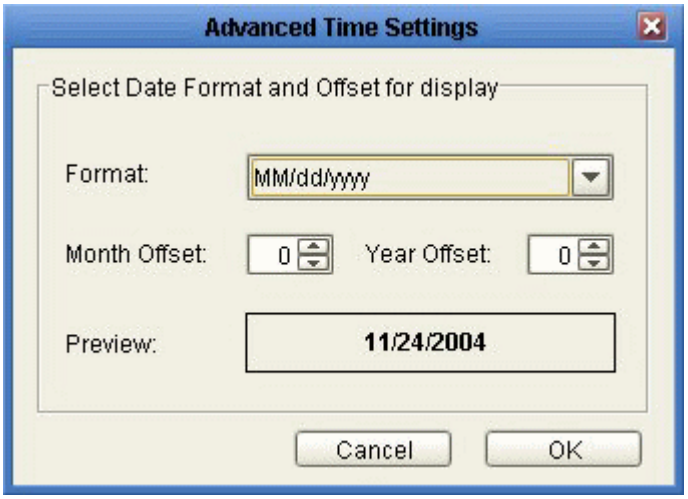
   - Relative to Last Sales Date if you always want to show a time range relative to the last sales date in the loaded data.

4. In the From Date and To Date boxes, enter values depending on the time filter you

have chosen, as follows:

Time Filter	Box	Action
Relative	From Date / To Date	Specify periods in both From and To with the current (computer) date as the reference point. For example: If the Time Scale is Month, and you want to see results starting from six months before today, enter -6 in From Date.
Fixed	From Date	Enter a specific date as a starting point of the results. To enter a date, click the calendar button and select a date.
Fixed	To Date	Specify the number of periods you want to include, starting from the From date.

5. To control how dates are displayed, click the Advanced button, which brings up the following dialog box:



6. In the Format dropdown list, select a display format.

   For example, to add one month to each displayed date, specify 1 for Month Offset.

The Preview field shows what the first time bucket would look like with this format and offset.

7. To offset the displayed dates, optionally specify values for Month Offset or Year Offset.

8. Click OK.

> **Note:** If you change the time scale, the worksheet or content pane might not show exactly the same aggregate numbers, because the cutoff dates would not necessarily be the same. For example, suppose your worksheet is weekly and displays 48 weeks of data. Then supposed you change the worksheet to display quarterly data. A quarter is 13 weeks, and the original span (48 weeks) is not an integer multiple of 13. So the worksheet selects a different amount of data and shows different overall results.

Specifying Aggregation Levels

A worksheet or content pane usually includes aggregation levels. When you use the worksheet or content pane, you can examine data for the item-location combinations associated with those levels.

- If you do not specify any aggregation levels, the data is completely aggregated across all items and locations.
- If you use a settlement level, you cannot use levels from any other hierarchy.

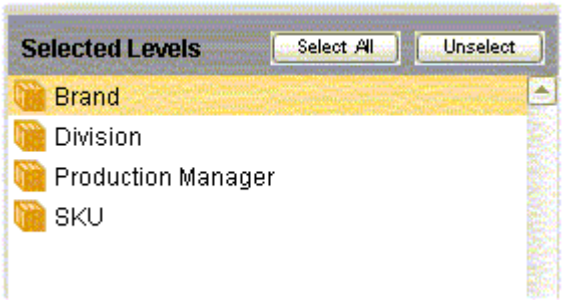
To specify the aggregation levels in a worksheet or content pane:

1. Click Worksheet > Aggregation Levels. Or click the Levels button.

   The system displays the Available Levels and Selected Levels lists.

2. Move all aggregation levels that you want into the Selected Levels list, using any of the techniques in "Working with Lists".

3. Remove any unwanted levels from the Selected Levels list.



For a worksheet, the selected levels will now be used on all views of this worksheet, unless you configure the views otherwise. The layout of the worksheet view controls the order in which the levels are used; see Defining the View Layout, page 13-20.

See also

- Using the Advanced Selection Options, page 13-12
- Changing the Overall Scale or Unit of Measure, page 13-14

Using the Advanced Selection Options

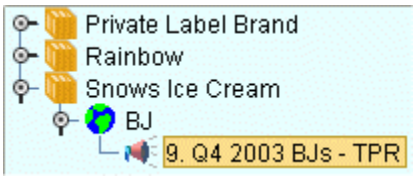
By default, if a worksheet or content pane includes a promotion level, the worksheet or content pane includes all the following types of combinations:

- Combinations that have both sales data and promotions
- Combinations that have sales data, but no promotions
- Combinations that have promotions, but no sales data

The worksheet or content pane displays placeholders for combinations that do not have promotions. For example:

For a worksheet, if you move the promotion level to the worksheet axis (see Defining the View Layout, page 13-20), the table will display a similar placeholder.

You can exclude some of these combinations. For example, you might want a worksheet to include only the combinations that have both sales and promotions, as follows:

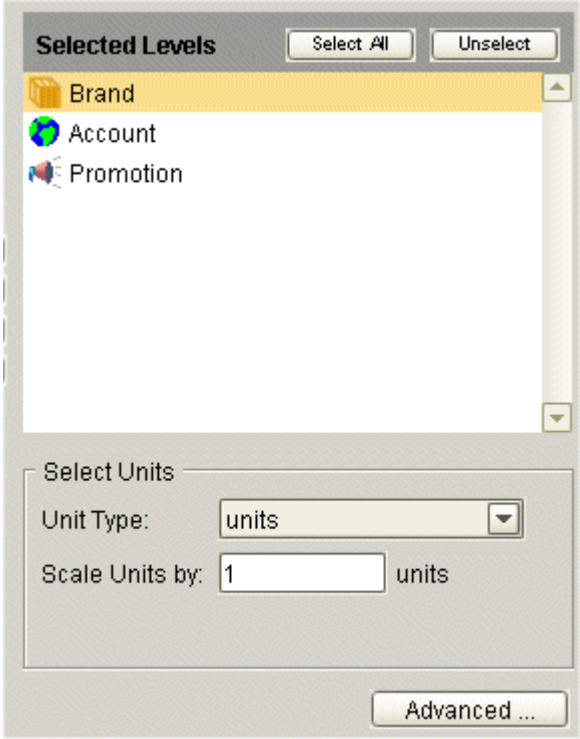


To exclude combinations with partial data:

1. Click Worksheet > Aggregation Levels. Or click the Levels button.

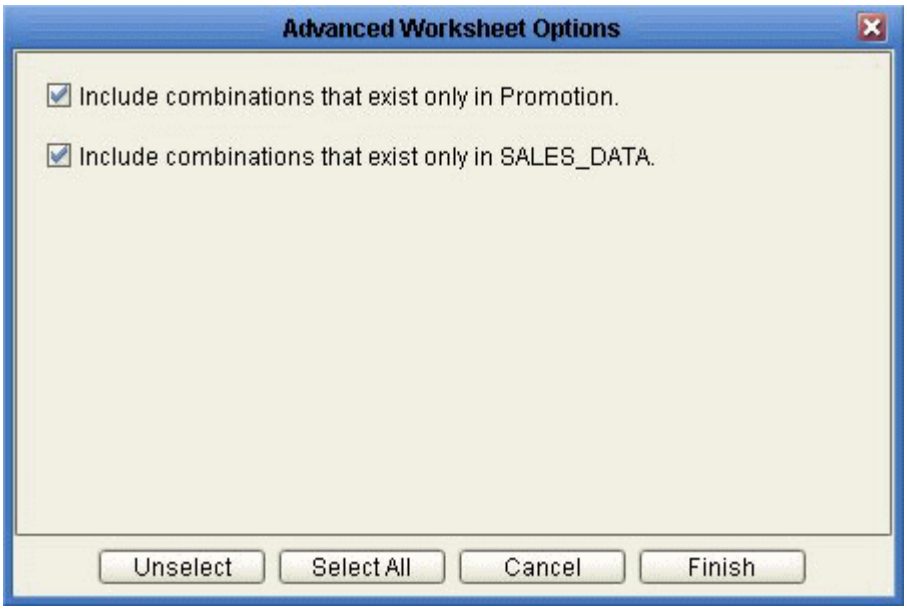
2. Include at least two levels, one of which should be a promotional level.

   When you do so, the screen displays an Advanced button in the lower right.



3. Click Advanced.

   Oracle displays a dialog box with additional options.



Include combinations that exist only in Promotion	This option selects combinations that have associated promotions, even if they do not have sales data.
Include combinations that exist only in SALES_DATA	This option selects combinations that have sales data, even if they do not have any associated promotions.

4. To exclude the combinations you do not want to see, click the check boxes as needed.

   See Specifying Aggregation Levels, page 13-11.

Changing the Overall Scale or Unit of Measure

In addition to levels, series, and filtering, a worksheet or content pane has the following characteristics:

- A single unit of measure. Typically, most series refer to this unit of measure, but there are exceptions such as percentage values. You can switch the unit of measure, and the displayed values are changed accordingly. The units in your system depend upon your implementation but probably include unit count and dollars.

  For monetary units, you can also switch to a different index (such as the Consumer Price Index or CPI) or exchange rate, and the worksheet or content pane automatically multiplies all values accordingly.

- An overall scale. The default value is 1. If the displayed values are all large, it can be useful to re-scale the numbers, for example, to display in amounts of 1000 or 1000000.

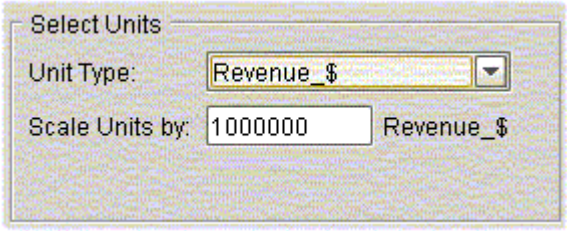
You can change either or both of these. When you make this change, the displayed values for most or all of the series in the worksheet or content pane are changed.

> **Note:** This change affects only the series that are scaled. Not all series are scaled. For example, a series defined as a percentage is probably not scaled.

To change the overall scaling factor:

1. Click Worksheet > Aggregation Levels. Or click the Levels button.

   The Levels page includes a section where you specify the overall scale of the worksheet or content pane, as well as its units of measure.



2. In the Scale Units by box, specify the factor by which all numbers are to be divided (for display purposes).

   For example, if you specify a factor of 1000, the displayed data will divided by 1000. So the number 96,000 will be displayed as 96. The vertical axis of the graph is updated to show the factor in parentheses. For example, if the vertical axis was formerly labeled "units", it will be updated to say "units (1000)" instead.

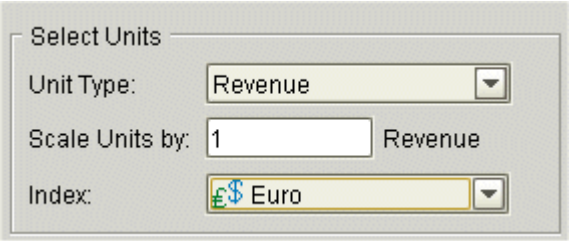
To change the unit of measure :

1. Click Worksheet > Aggregation Levels. Or click the Levels button on the toolbar.

2. In the Unit Type box, select the unit of measure to display in the worksheet or content pane results.

   For example, our items are bottles, and suppose that a case that contains six bottles. If you display the worksheet or content pane with cases instead, the system will display the number of bottles divided by six.

3. If the Index box is displayed, choose an index from the dropdown list.



The Index menu lists all the time-dependent indexes and exchange rates that are associated with this unit. Each index or exchange rate is a time-varying factor that the worksheet or content pane can use. When you select an index, the worksheet or content pane will automatically multiply all monetary series by the factor for each date. For example, if you choose Consumer Price Index (CPI) as the index, the system will calculate all monetary quantities with relation to the CPI.

> **Note:** These indexes and exchange rates are generally imported from other systems. The set available to you depends upon your implementation.

See Specifying Aggregation Levels, page 13-11.

Filtering the Worksheet or Content Pane

Filters control the combinations that you are able to see. Filtering can have multiple sources:

- A given worksheet or content pane may be filtered. For example, worksheet X might show only Brand X, which means that the worksheet would show only combinations related to Brand X.
- Your user ID may be filtered. For example, if you are an account manager, your user ID might give you access only to your accounts. At any level, you would not be able to see combinations associated with other accounts.
- The data that you share with other users (called the component) might also be filtered. Components divide the data for different sets of users.

Demantra automatically combines all the filters. In the preceding example, if the component is not filtered, if you use worksheet X, you can see only data for Brand X at your accounts.

In contrast to an exception filter ("Applying Exception Filters"), this type of filter is static and behaves the same no matter how the data changes.

To apply a filter to a worksheet or content pane:

1. Click Worksheet > Filters. Or click the Filters button.

   The system displays the Available Filter Levels and Selected Filter Levels lists.

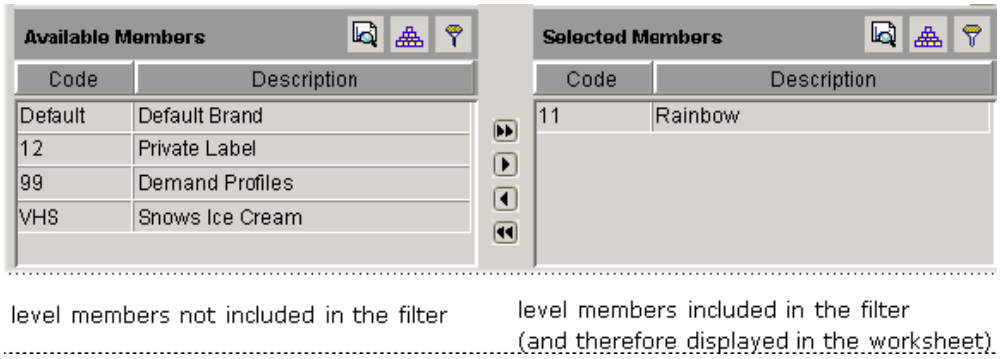
2. Find the aggregation level at which you want to filter data and move it from the Available Filter Levels list into the Selected Filter Levels list, using any of the techniques in "Working with Lists".

   > **Note:** This level does not have to be the same as any of the aggregation levels you display in the worksheet or content pane. In fact, typically you filter using a different level than you use to display.

3. In the Available Members list, find a member that you want to include and move it into the Selected Members list, using any of the techniques in "Working with Lists.".

   At this stage, the worksheet or content pane includes only data for this member. (Before you applied a filter at this level, the worksheet or content pane could theoretically include any member of this level.)

4. Continue to move members from the Available Members list into the Selected Members list, until the latter list includes all the members you want.



To filter data further:

Once you have applied a filter as described previously, the worksheet or content pane contains only those combinations that are associated with the members you specified. You can further filter the data in exactly the same way.

See Applying Exception Filters, page 13-18.

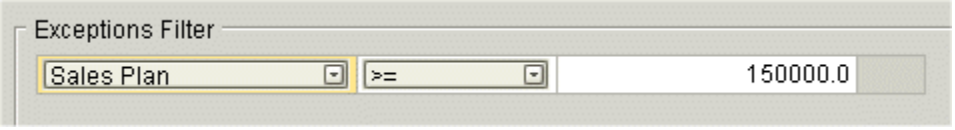
Managing the List of Members

Depending on how your system has been configured, it might contain a very large number of members. If so, you might want to sort or filter the list or search it. For information, see Managing the Series Lists, page 13-7.

Applying Exception Filters

If you attach an exception filter, Demantra checks the values of the data and displays only the combinations that meet the exception criteria. In contrast to an explicit filter, Filtering the Worksheet or Content Pane, this type of filter is dynamic and can behave differently as the data changes.

Specifically, you define an exception condition that consists of a series, a comparison operator, and a value, for example:

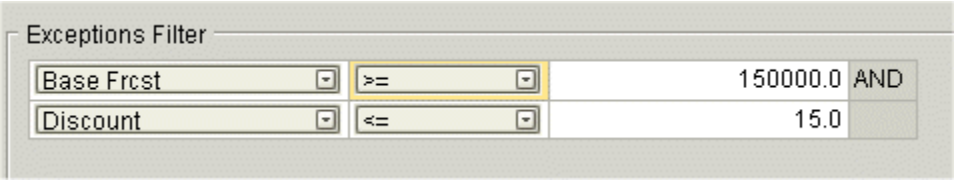


When you open the worksheet, Demantra checks each combination in the worksheet. For each combination, if the condition is met for any time in the worksheet date range, Demantra displays that combination. For example, the worksheet shows combinations that have Sales Plan values greater than or equal to 150000, within the time range included in the worksheet.

If the condition is not met at any time for any of the worksheet combinations, Demantra shows the worksheet as empty. That is, if all values in the Sales series are less than 15000 for all combinations, the worksheet comes up empty.

> **Note:** If the worksheet includes a promotion level or a promotion series, the behavior is slightly different. In this case, the Members Browser or dropdown list does initially show all combinations. When you click display a combination to display it, the worksheet then checks for exceptions.

You can apply multiple exceptions to a worksheet. When you apply multiple exceptions, you can relate them to each other via logical AND or logical OR relationships. For example:



To apply an exception filter:

1. Click Worksheet > Exceptions. Or click the Exceptions button.

   The Exceptions Filter page appears.

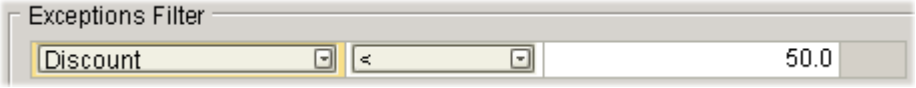
2. Click Add.

3. In the first box in the new row, select a series from the dropdown list.

   Note: Typically only some series are available for exceptions. If you do not see a series you need, contact your Demantra administrator or your implementors.

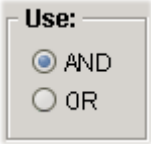
4. In the second box, select an operator from the dropdown list.

5. In the third box, type or choose a value.



   - For a numeric series, type a number.
   - For a dropdown series, choose one of the allowed values of this series.
   - For a string-type series, type any string. You can use the percent character (%) as a wildcard.
   - For a date-type series, type a date or use the calendar control to choose a date.

6. (Optional) You can apply additional exceptions. Select the AND or the OR radio button to specify the relationship between the exceptions.



To delete an exception filter:

1. Click the exception and then click Delete.

   See

   - Filtering the Worksheet or Content Pane, page 13-16.

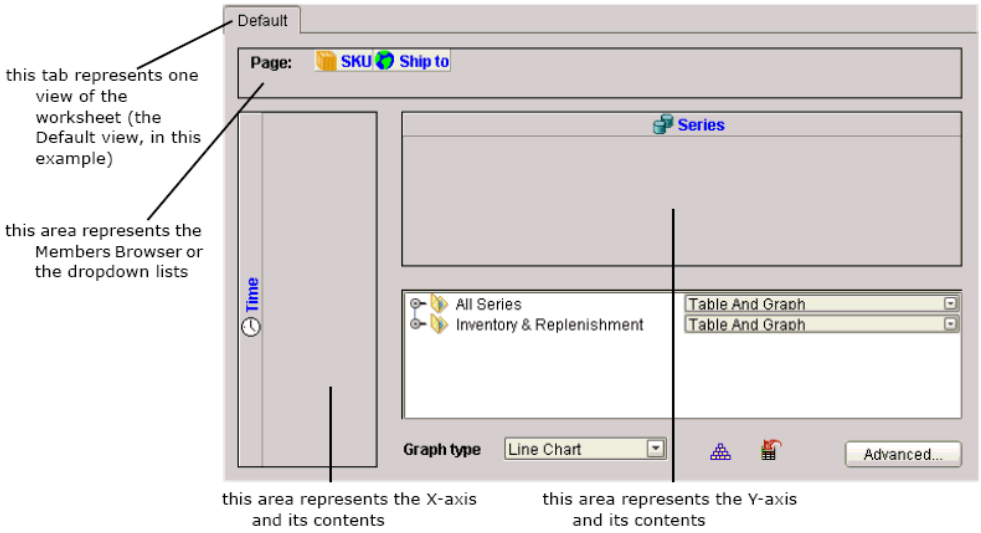
Defining the View Layout

This section applies only to worksheets, not to content panes.

To define the layout of a current view:

1. Click Worksheet > Layout Designer. Or click the Layout Designer button.

   The system displays a page where you specify the layout. This page displays the following areas:



   In addition, this screen displays the following icons:

   - An icon for each aggregation level that you have included in the worksheet. By default, these levels are included in the Members Browser or selector lists.
   - An icon that represents the time axis. By default, time is shown on the x-axis.
   - An icon that represents the series data. Series are shown on the y-axis.

2. To change the worksheet layout, drag the level or time axis icons to the appropriate areas. You cannot move the series icon.

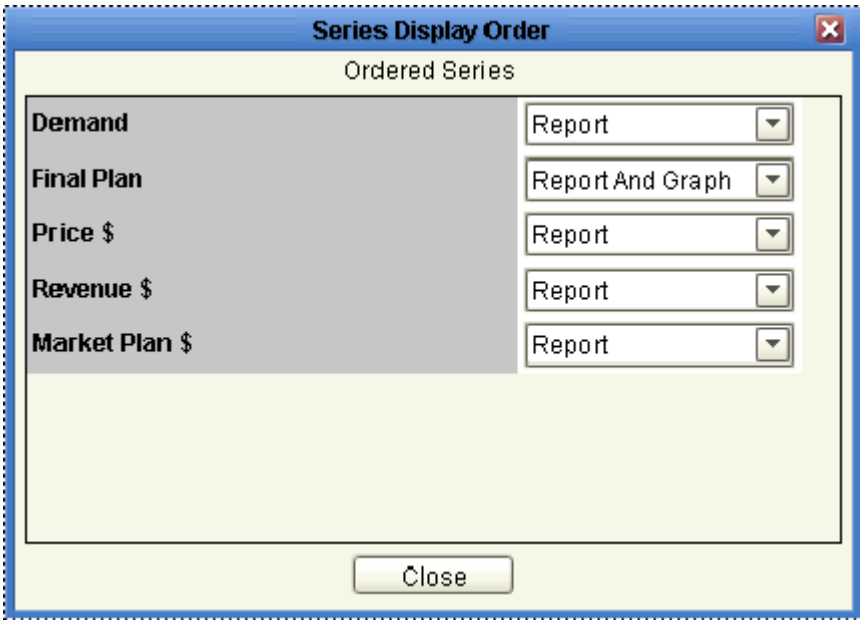
3. To specify the type of graph to use, select a graph type from the Graph Type dropdown list.

4. To specify how to display series in this view:

   1. Click the Sort button.

      The Layout Designer displays a page that shows the order in which this view

currently displays the series.



2. To hide a series in this view, click the None option in the dropdown list to the right of the series name.

3. Otherwise, to specify where to display the data for a series, select one of the following options: Table, Graph, Table and Graph.

4. To move a series up or down in this list, click the series name and drag it up or down.

5. When you are done, click Close.

5. Click Save.

6. Rerun the worksheet to see your changes. To do so, click Data > Rerun.

To specify a cross-tab layout:

1. Drag one or more level icons from the Page Item area to x-axis or y-axis areas.

To specify which levels to use in a worksheet view:

By default, all levels you include in a worksheet are used on all views of the worksheet. Within a multi-view worksheet, you often hide some of the levels in some views, so that each view is aggregated differently.

1. Right-click within the Page area of the Layout Designer.

The system displays a menu like the following:

2. Click Hide level and then click the name of the level to hide.

   When you hide a level, the worksheet automatically aggregates data across members of that level.

   Note: Do not use this option to hide the time axis.

To revert to the default layout of a worksheet view:

1. Click Worksheet > Layout Designer. Or click the Layout Designer button.
2. Click the tab corresponding to the worksheet view you want to reset.
3. Click the Reset button.

   In the default layout, all selected levels are visible and are on the X axis. Also, all series are displayed in the graph and table according to their default definitions.

   See

   - Specifying the Worksheet Elements in a View, page 13-24
   - Displaying an Embedded Worksheet, page 13-25
   - Filtering a Worksheet View, page 13-26

Adding and Managing Worksheet Views

This section applies only to worksheets, not to content panes.

A worksheet can include multiple views, each of which can have a different set of series and a different layout.

To add a worksheet view:

1. Within the Layout Designer, click the Add Worksheet View button.

2. In the popup dialog box, type the name of the new view.

3. Click OK.

To control synchronization between the views:

The views of a worksheet may or may not be synchronized with each other. If they are synchronized, when you edit in one view, that change automatically appears in the other views. Because this can affect performance, sometimes it is best to switch off this synchronization.

Within the Layout Designer, click one of the following buttons, whichever is currently displayed:

- Do not force synchronization between views
- Synchronize data between views

To rename a worksheet view:

1. Within the Layout Designer, click the Rename Worksheet View button.

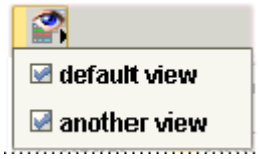
2. In the popup dialog box, type the new name of the view.

3. Click OK.

To enable or disable a worksheet view:

1. Within the Layout Designer, click the Hide/Display button.

2. The Layout Designer displays a popup list of all the views associated with this worksheet. A check mark is displayed next to each view that can currently be displayed.



3. For the view interest, select the check box next to the name of the view.

4. Click elsewhere on the screen to close the list of views.

To delete a worksheet view:

Within the Layout Designer, do one of the following:

- Click the tab that corresponds to the worksheet view. Then click the Delete Worksheet View button.
- Click the Delete All Worksheet View button. Then, at the prompt, click Yes.

See

- Defining the View Layout, page 13-20
- Specifying the Worksheet Elements in a View, page 13-24
- Displaying an Embedded Worksheet, page 13-25
- Filtering a Worksheet View, page 13-26

Specifying the Worksheet Elements in a View

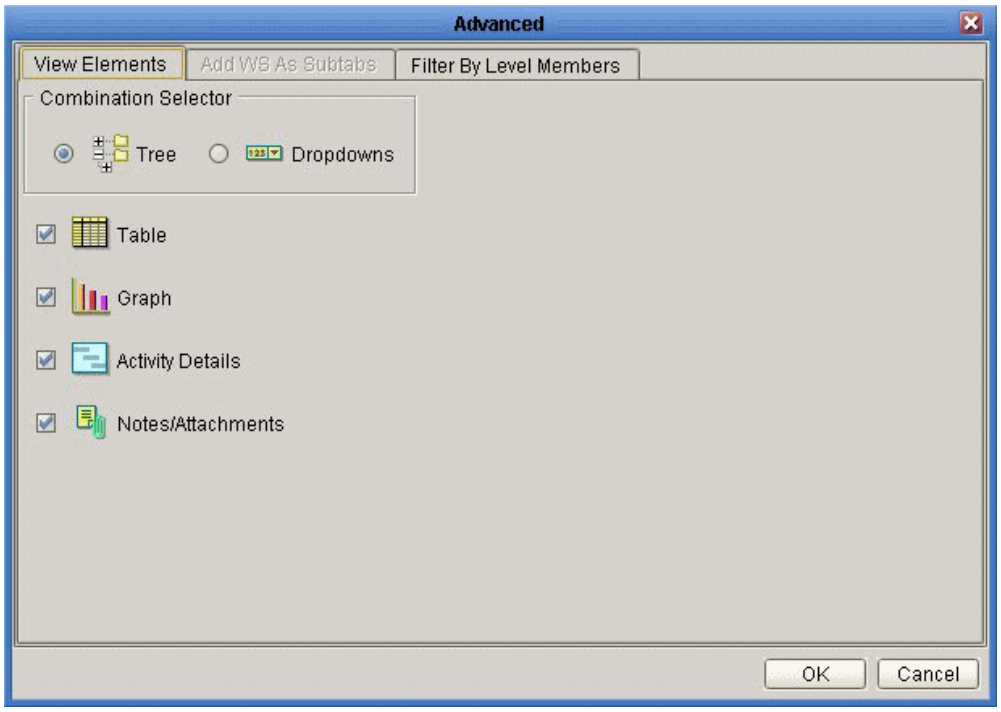
This section applies only to worksheets, not to content panes.

For each worksheet view, you can specify which of the basic worksheet elements are included: the table, the graph, and so on.

To specify the elements to include in a worksheet view:

1. Click Worksheet > Layout Designer. Or click the Layout Designer button.
2. Click the tab corresponding to the worksheet view you want to modify.
3. Click Advanced... in the lower right.

   Demantra displays the following screen:



4. For Combination Selector, click either Tree (to display a Members Browser) or Dropdowns (to display dropdown menus instead).

5. Select the check box next to each element you want to include in this view of the worksheet.

6. Click OK.

Displaying an Embedded Worksheet

This section applies only to worksheets, not to content panes.

You can display embedded worksheets on subtabs within a view. An embedded worksheet can be at a higher aggregation level than the rest of the worksheet, and the worksheet itself remains editable in general.

> **Note:** The choice of worksheets you see depends on the level-worksheet associations that are controlled within the Business Modeler.

To display an embedded worksheet as a subtab within a view:

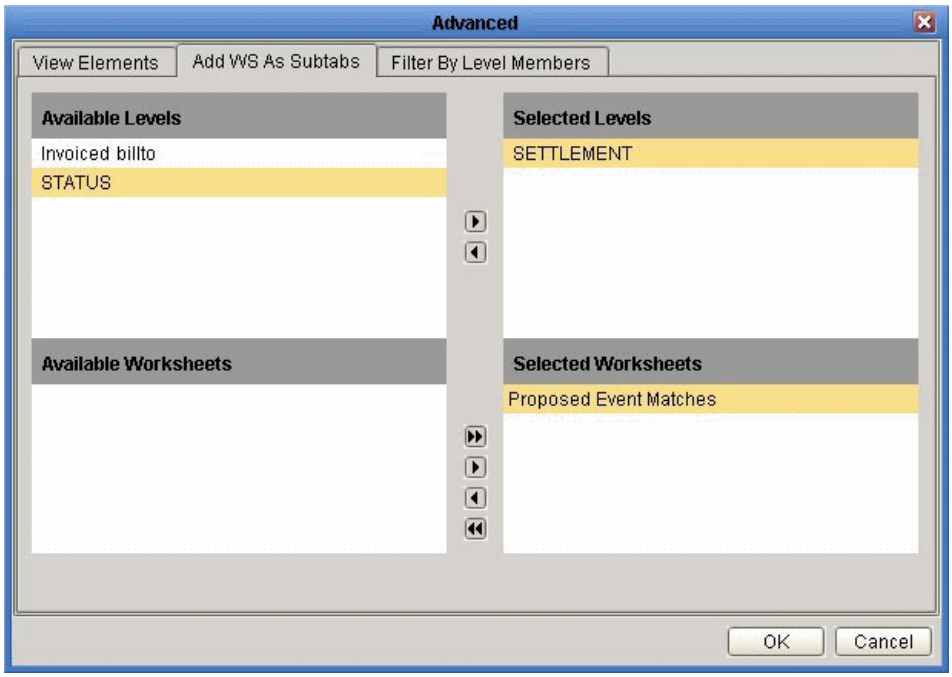
1. Click Worksheet > Layout Designer. Or click the Layout Designer button.

2. Click the tab corresponding to the worksheet view to which you want to add the

sub tab.

3. Click Advanced... in the lower right.
   - Demantra displays the Advanced screen.

4. Click the Add WS As Subtabs tab.
   - Demantra displays a screen like the following:



   Depending on the level that you select, the bottom part of the screen shows different worksheets that you can add as a subtab to this worksheet view.

5. For Selected Levels, select the level that is associated with the worksheet you want. In general, a worksheet is associated with the levels where it makes sense to use it; this is controlled by your system configuration. You can choose any of the levels that are used in this worksheet.

6. For Selected Worksheets, select the worksheets that you want to display as sub tabs within this worksheet view.

7. Click OK.

Filtering a Worksheet View

This section applies only to worksheets, not to content panes.

For each worksheet view, you can filter the view to show a subset of the data in the worksheet.

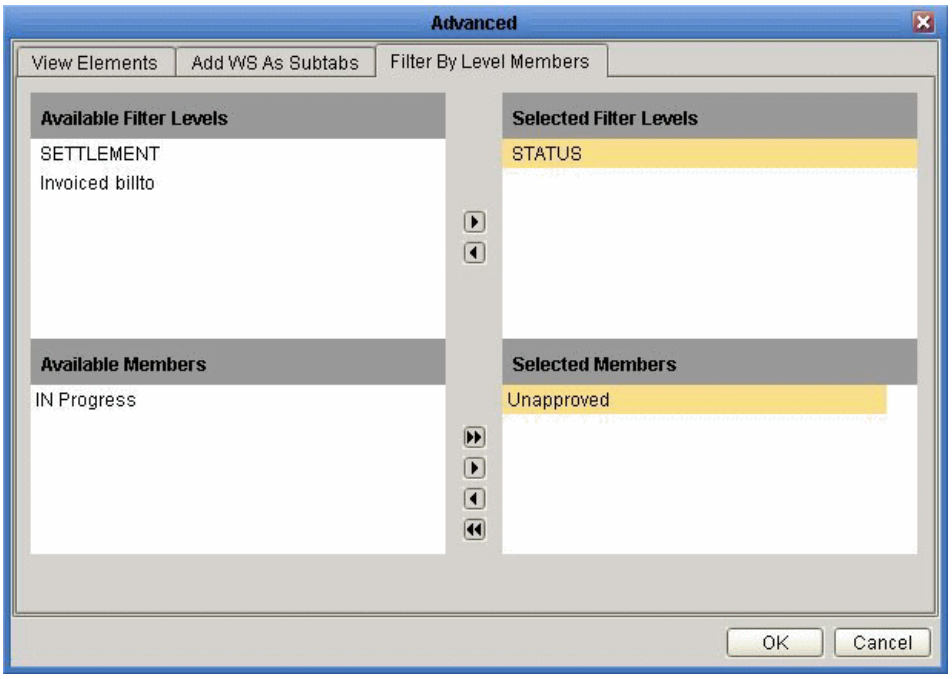
To filter a worksheet view:

1. Click Worksheet > Layout Designer. Or click the Layout Designer button.

2. Click the tab corresponding to the worksheet view you want to filter.

3. Click Advanced... in the lower right.
   - Demantra displays the Advanced screen.

4. Click the Filter By Level Members tab.
   - Demantra displays a screen like the following:



5. For Selected Filter Levels, select the level by which you want to filter this worksheet view. You can choose any of the levels that are used in this worksheet.

6. For Selected Members, select the level members whose data should be displayed in this worksheet view.

7. Click OK.

Sharing Worksheet and Content Panes

In general, any worksheet or content pane is one of the following:

- Private—available only to you
- Public—available to other users as well. (If you are using Collaborator Workbench, this means the worksheet or content pane is available to others users within the collaborative group.)

In either case, the original creator owns it and only that person can change it.

When you do share worksheet and content panes, however, you should consider data security. Demantra automatically prevents any user from seeing data for which he or she does not have permissions. If you build a worksheet or content pane with data that other users do not have permissions to view, then those users will see an empty worksheet or content pane. Similarly, if a user has partial permissions for the data, then the worksheet or content pane will open with only those results that are permitted.

See Configuring the Basics, page 13-4.

Deleting Worksheet or Content Panes

You can delete a worksheet or content pane if you are its owner.

To delete a worksheet or content pane:

1. Open the worksheet or content pane.
2. Click File > Delete. Or click the Delete button.
   - Demantra prompts you to confirm the deletion.
3. Click Yes or No.

General Tips on Worksheet Design

This section applies mostly to worksheets, not to content panes.

- For performance reasons, don't select too much data to view, unless there is no other choice.
- If you receive a message saying "out of memory," try the following techniques to reduce the amount of memory that your worksheet selects:
  - Remove series if possible

    - Reduce the span of time
    - Apply filters

- If you do need to select a large amount of data, use the levels to your advantage. Specifically, use the levels in the Members Browser or selector lists rather than moving them to a worksheet axis. If levels are in the Members Browser or selector lists, each combination in the worksheet is relatively smaller and will load more quickly.
- If you do not plan on working with the Activity Browser, you can switch off the Auto Sync option on the toolbar, and you can also hide the Activity Browser and Gantt chart.
- Remember that you can filter the worksheet by any level, including levels that are not shown in the worksheet. For example, you might want to see data at the region level, but exclude any data that does not apply to the Acme territory. To do this, you would filter the worksheet to include only the Acme member of the Territory level, but you would select data at the Region level.
- A multi-view worksheet is useful in following cases:
    - If you need to edit data at one aggregation level and see easily how that affects higher aggregation levels.
    - If you need to display a large number of series without having to scroll to see each one.

14

Administration

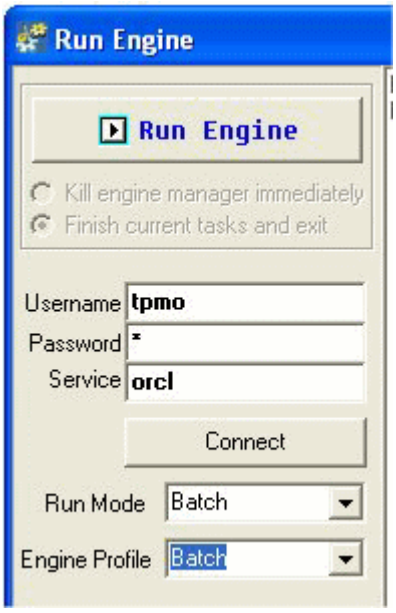
This chapter covers the following topics:

- Running the Analytical Engine
- Running Required Workflows
- Managing the PTP Users

Running the Analytical Engine

You should run the Analytical Engine in batch mode probably about once a week. This generates a forecast for all the data in the system.

1. Click Demantra > Demantra Spectrum release > Engine Administrator.
2. Click File > Run Engine.



3. For Username and Password, enter the username and password of the database user that stores the Demantra data. (In the installer, this user is referred to as the Oracle Database User).

4. For Server, enter the Oracle SID of the database.

5. Click Connect.

6. For Run Mode, click Batch.

7. For Engine Profile, click Batch.

8. Click Run Engine.

   After running the Analytical Engine, you should run the Run App Proc After Batch Engine workflow.

   See Running Required Workflows, page 14-2.

Running Required Workflows

PTP provides several workflows that perform necessary back-end tasks. An administrator will need to run these workflows periodically. To run workflows, you use the Workflow Manager, a Web-based tool that can be accessed only by users with the System Manager permission level.

This section lists these workflows and describes how to run them.

Required Workflows

You should run the following workflows periodically:

Workflow	When to run
CopyRetailerDefaults	Run this each time you edit a retailer to use the default profile and each time you edit the retailer defaults in the Business Modeler.
Run Drop Temps	Run this daily.
Run App Proc After Batch Engine	Run this after you run the Analytical Engine in batch mode.

Logging on to the Workflow Manager

1. Click Demantra > Demantra Spectrum release > Collaborator Workflow.
2. In the Log On dialog box, enter your user name and password.

   The Workflow Manager comes up, displaying a list of workflow schemas.

Starting Workflow Instances

To start a workflow instance

Click Start next to the schema that you want to start.

Viewing Workflow Status

You can view all the status of all public workflow schemas and all private workflow schemas that you created. This means that you can see how many instances of those schemas are running, as well as the status of each instance.

To view overall status of the workflows

The Workflow Manager displays the overall status information for the workflows.

View according to Schema Groups: All

New Modify Delete

Schema ID	Schema name	Owner	Creation Date	Last Modified	Instances	Status	Action			
1	Partner Plan collaboration	dp	Feb 28 20:10:02 2002	Aug 21 16:56:46 2003	0		Edit	Start	Schedule	Delete
2	Space_consumption_Alert	guy_yehiav	Apr 14 21:21:45 2003	May 07 18:05:45 2003	0		Edit	Start	Schedule	Delete
22	Stockout_Alert	guy_yehiav	Apr 14 22:40:47 2003	Sep 22 16:31:00 2003	0		Edit	Start	Schedule	Delete
23	CPFR_Step_1	guy_yehiav	Apr 29 17:46:04 2003	Apr 29 17:46:34 2003	0		Edit	Start	Schedule	Delete
43	Stockout_Alert_Per_Store	guy_yehiav	May 08 13:05:53 2003	May 08 13:05:53 2003	0		Edit	Start	Schedule	Delete
63	Export Dynamic Data	Inv	May 16 09:59:59 2003	May 16 10:00:14 2003	0		Edit	Start	Schedule	Delete

Process Log New Schema Refresh

Each row corresponds to a workflow schema. The Instances column indicates how many instances of this workflow schema are currently running, if any. The Status column uses the following color codes:

Green	The workflow schema is live and you may execute it, creating a workflow instance.
Red	The workflow schema is archived and cannot be executed.
Yellow	There is a data error or other fault within this schema.

To view the currently running instances of a schema

1. Click the Instances link in the row corresponding to that workflow.

   The Workflow Manager lists all the instances of that schema that are currently running.

Process ID	Started at	Initiator	Current step	Action
7	Mon Dec 08 14:53:16 EST 2003	dp	ExportMasterData	Terminate

Back Refresh

2. When you are done, click Back.

Scheduling Workflow Instances

If you are the owner of a workflow, you can schedule an instance to start at a specific time or times. If you are not the owner, you cannot schedule it, although you can start it

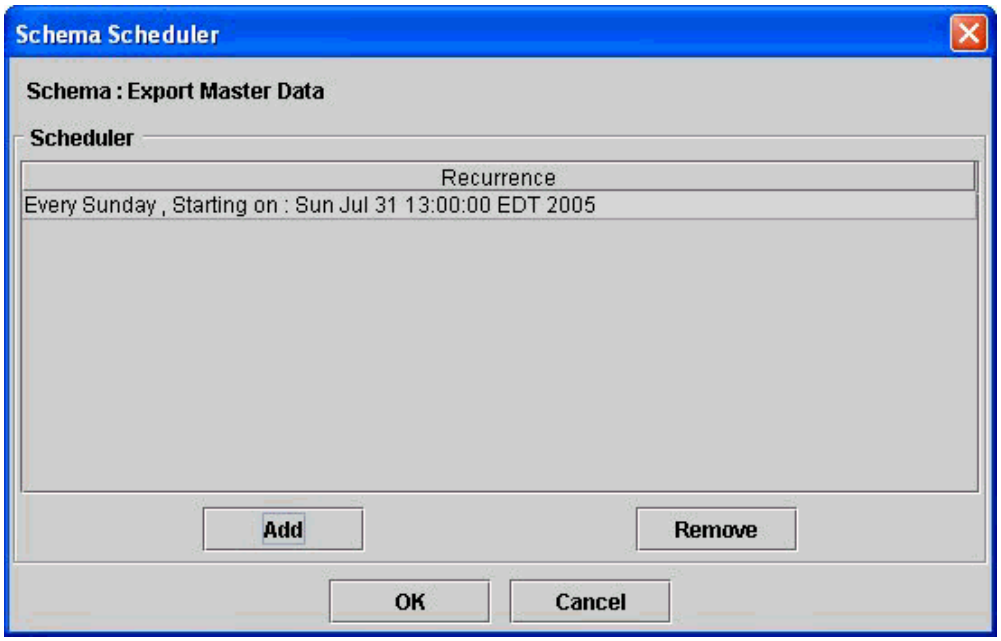
manually, as described in "Starting Workflow Instances".

To schedule a workflow instance

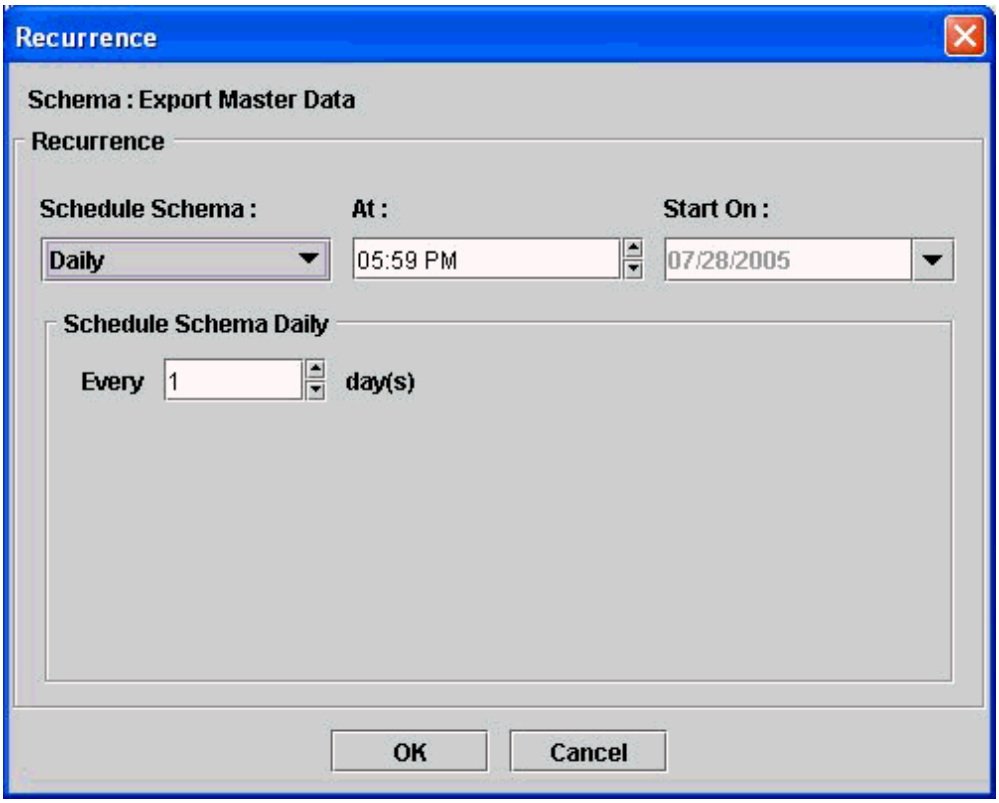
1. If the workflow schema is not visible, use the dropdown menu and select the name of a schema group to which it belongs. Or select All.

2. Click Schedule in the row corresponding to that workflow.

   The system displays the Schema Scheduler page, which lists all the times when Workflow Engine will start an instance of this schema.



3. Click Add.



4. In the Schedule Schema dropdown list, select the option that specifies how often to start an instance of this workflow:
   - Daily
   - Weekly
   - Monthly
   - Once
   - At Startup (This option launches the workflow whenever the Web server is started.)
   - Periodic (in this option, you can start a workflow at periodic intervals (measured in seconds, minutes, hours, days, weeks, months, or years. Note that you cannot choose the starting time.)

   Depending on the choice you make here, the system displays additional scheduling options in the bottom part of the page.

5. In the rest of the page, finish specifying the schedule.

6. Click OK.

To unschedule a workflow instance

1. On the Workflow Management page, click Schedule in the row corresponding to that workflow.

   The system displays the Schema Scheduler page. This page displays one row for each scheduling entry for this workflow.

2. Click the row corresponding to the scheduling entry you want to remove.

3. Click Remove.

Stopping Workflow Instances

You can stop any workflow instance that you started. You cannot stop a workflow instance started by another user.

To stop a workflow instance

1. If the workflow schema is not visible, use the dropdown menu and select the name of a schema group to which it belongs. Or select All.

2. Click the number in the Instances column that corresponds to that workflow.

   The system lists all the instances of that schema.

Process ID	Started at	Initiator	Current step	Action
7	Mon Dec 08 14:53:16 EST 2003	dp	ExportMasterData	Terminate

Back Refresh

> **Note:** Instances that show in red are instances of Fail-To-Execute Step steps. For more information, see the *Oracle Demantra Foundation Implementation Guide*.

3. Click Terminate next to the instance that you want to stop.

4. Click OK.

   The instance is stopped and is removed from the list of instances.

> **Note:** Terminate stops only the workflow instance itself. It does not cancel any work that the instance may have initiated (such as tasks that were sent or requests placed in the Simulation Engine or

Business Logic Engine queues). These items must be cancelled manually.

See the *Oracle Demantra Implementation Guide*

Managing the PTP Users

To manage the PTP users, you use the Business Modeler, a desktop tool that can be accessed only by users with the System Manager permission level. (Other users can log into the Business Modeler, to change their own passwords, but no other options are available to them.)

Logging onto the Business Modeler

Before starting the Business Modeler, make sure that the database is running.

To start the Business Modeler

1. On the Start menu, click Programs.
2. Click Demantra > Demantra Spectrum release > Business Modeler.

   A login window appears.
3. Enter your user name and password.
4. Click Login.

Copying a User

The easiest way to create new users is to copy existing users and edit the details as needed.

To copy a user

1. In the Business Modeler, click Security > Create/Modify User.

   The Create/Modify User dialog box appears.
2. Click the button of the user you want to copy, and then click Create Copy.

   The User Details dialog box appears. Some of the information, such as user name, is blank. Other details, such as the company name, are copied from the original user.
3. Specify the user name and password for the new user.

4. Make other changes as needed.

5. Do one of the following:

   - Click Next to continue editing information for the new user. Demantra initially uses all the same values as for the original user.

   - Click Finish.

Creating or Modifying a User

To create or modify a user

1. In the Business Modeler, click Security > Create/Modify User.

2. Next:

   - To create a new user, click the New User button, and then click OK.

   - To modify a user, click the button of that user then click OK. Or double-click the icon of the user whose details you want to modify.

   The User Details dialog box appears.

3. Specify basic user details as follows:

   1. Under Enter User Details, type the following information in the appropriate boxes (or select from the dropdown lists):

      - The user name, password, permission level, and the language in which the system will be operated.

- The first and last name of the user, the company name, phone and fax number, and the email address.

2. For Permission Level, use System Manager if this user needs access to the Business Modeler and the Workflow Manager. Otherwise, use Supervisor.

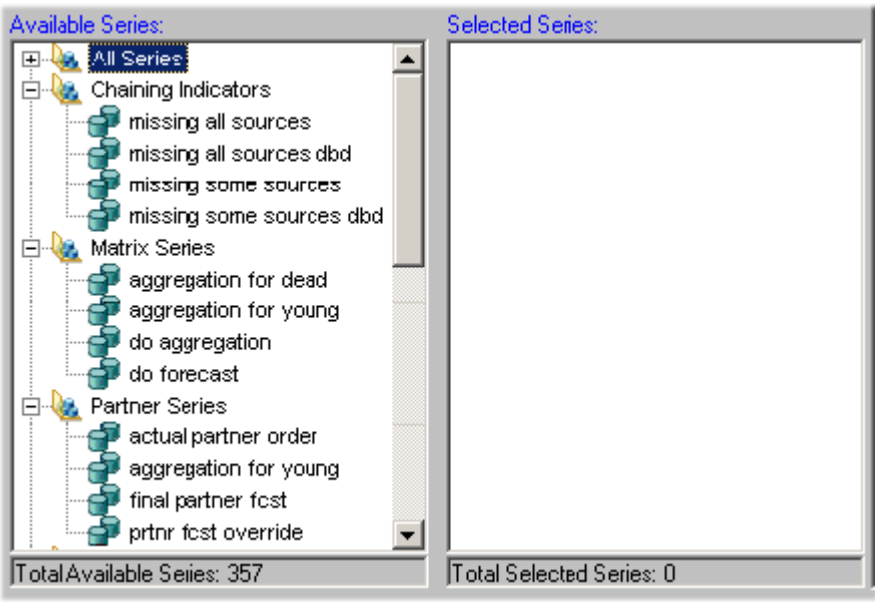
3. Click Next.

The User Modules dialog box appears. Here you specify which Demantra user interfaces this user can access.

Name	Status	Available Named Users	Defined Concurrent Users
Demantra Administrative Tools	☑	9983/9999	9999
Demantra Demand Planner	☑	9982/9999	9999
Demantra Demand Planner Web	☑	9982/9999	9999
Demantra Collaborator Workbench	☑	9981/9999	9999
Demantra Anywhere	☑	9990/9999	9999
Demantra Promotion Effectiveness	☑	9981/9999	9999
Settlement Management	☐	9999/9999	9999
Demantra Promotions Optimization	☐	9999/9999	9999

4. Click the check box next to each module that the user needs to work with. Then click Next.

   The New User - Select User Series dialog box appears. This dialog box allows you to determine what data series will be active for the new user, from the entire set of series in this component. Each list is a collapsible list of series groups and the series in them.



If a series is not active for a user, it is not available when the user creates worksheets and is not viewable in existing worksheets to which the user has access.

5. Specify the series that a user can see, as follows:

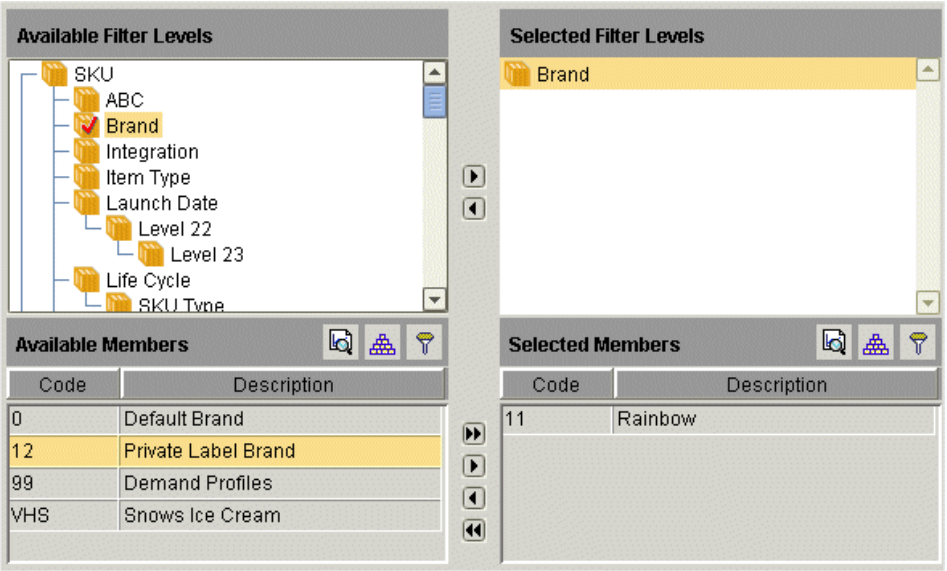
   1. Move all series that you want into the Selected Series list. To do so, either double-click each series or drag and drop it.

   2. Remove any unwanted series from the Selected Series list.

      Note: You can also move an entire series group from one list to the other in the same way.

   3. When you are done specifying series, click Next.

      The New User - Select User Filters dialog box appears. This dialog box lets you filter the data that the user can see; specifically, you control which levels and which members of those levels the user can see.



6. Filter the data that the user can see, as follows:

   1. Click a level in the left side of the dialog box and drag it to the box on the right. Or double-click a level in the left side.

   2. Now specify which members of this level the user can see. To do so, click a member in the list, and then click the right arrow button. Or double-click the member you want to filter out.

      The system moves the selected members to the box on the lower right side. Now the user can see only the selected members of this level. In the preceding example, the user can see only data that is associated with the Rainbow brand.

      Note: The Selected Members list cannot include more than 200 members.

   3. Repeat the preceding steps for each filter you want to add. Each filter automatically limits the choices available in subsequent filters.

   4. When you have appropriately filtered data for the user, click Next.

   The New User - Select User Groups dialog box appears. This dialog box allows you to select the group or groups to which the new user will belong. Members of a group can see each other within Who's Online.

7. Specify the collaboration groups to which a user belongs, as follows:

   1. Move all groups to which the user should belong into the Selected Groups list.

To do so, either double-click each group or drag and drop it.

> **Note:** You can also select and move multiple groups with the standard Ctrl+click or Shift+click actions.

2. Remove any unwanted groups from the Selected Groups list.
3. Click Next.

8. Click Finish.

Deleting a User

To delete a user

1. In the Business Modeler, click Security > Create/Modify User.
2. Click the button of the user you want to delete, and then click Delete.

   A question box appears, asking if you are sure you want to delete the selected user.
3. To delete the selected user, click Yes.

See the *Oracle Demantra Implementation Guide*

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