

## **Oracle® EnterpriseOne Supply Chain Planning**

Demand Consensus 8.12.1

Resources Integration Guide

March 2007

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# WORKING WITH THE EXCEL CLIENT

This guide contains an overview, and explains how to:

- Download the Microsoft XML parser.
- Download the Excel Client.
- Load the Excel Client.
- Format the Excel worksheet.
- Import and export forecast data.
- Download and upload forecast data.

## Understanding the Excel Client

Editing data in the Consensus Conference Room and the Forecast Studio is often time consuming because you have access to only a single demand point at one time. The Excel Client is a Microsoft Excel add-in that makes updating forecast data easy. The Excel Client presents the data in multiple demand points in an Excel spreadsheet – a format that is easy to read and edit.

Users who have access to the Consensus Conference Room can make changes to single demand points on the Edit page. Users can also make changes to multiple demand points by downloading data into the Excel Client, configuring the data and then uploading the changed data into the database. Users who are only required to review a particular set of forecast data will find it easier to view and edit that data in the Excel Client.

External users who do not have access to the Consensus Conference Room can be e-mailed a copy of the Excel Client, which they can use to exchange forecast data with the Consensus Conference Room. Using the Excel Client enables users such as account managers, sales representatives, and customers to contribute to the consensus forecast process without having direct access to the Consensus Conference Room.

Demand planners who configure forecast data in EnterpriseOne Demand Forecasting can use the Excel Client to import from and export data to the database. By exporting forecast data into an XML file, the demand planner can view all forecast versions and data for a single demand point. They can work offline in the Excel Client, revise the data, create a forecast report, and then export the data back into the database.

This image shows forecast data that has been imported into Microsoft Excel using the Excel Client:

Product Path	Location Path	Channel Path	Effective From	Effective Through	Forecast Version	Unit of Measure	01/01/2003	02/01/2003	03/01/2003
114 /Recreational/Inline Skates/Powerline, Green	/Canada/Montreal/Bike Sport 1	Independent	01/02/2000	25/12/2003	Sales	Dollars	20142.434	20142.434	20142.434
115 /Recreational/Inline Skates/Powerline, Green	/Canada/Montreal/Outdoor Life 1	Mass Market			Sales	Dollars	8377.566	8377.566	8377.566
116 /Recreational/Inline Skates/Powerline, Green	/Canada/Toronto/Bike Sport 2	Independent	01/02/2000	25/12/2003	Sales	Dollars	8377.566	8377.566	8377.566
117 /Recreational/Inline Skates/Powerline, Green	/Canada/Toronto/Outdoor Life 2	Mass Market			Sales	Dollars	12183.031	12183.031	14010.486
118 /Recreational/Inline Skates/Powerline, Green	/Canada/Vancouver/Bike Sport 3	Independent	01/02/2000	25/12/2003	Sales	Dollars	8621.503	8621.503	8621.502
119 /Recreational/Inline Skates/Powerline, Green	/Canada/Vancouver/Outdoor Life 3	Mass Market			Sales	Dollars	4600	6899.999	5749.999
120 /Recreational/Inline Skates/Powerline, Green	/Germany/Frankfurt/Metro Bike 1	Independent			Sales	Dollars	5016.231	4556.231	3636.231
121 /Recreational/Inline Skates/Powerline, Green	/Germany/Frankfurt/Radsport 2	Independent			Sales	Dollars	6369.068	3302.409	9512.409
122 /Recreational/Inline Skates/Powerline, Green	/Germany/Munich/Metro Bike 2	Independent			Sales	Dollars	396.948	13.615	1163.616
123 /Recreational/Inline Skates/Powerline, Green	/Germany/Munich/Radsport 1	Independent			Sales	Dollars	1246.839	326.839	326.839
124 /Recreational/Inline Skates/Powerline, Green	/United States/Denver/Bikemart 1	Mass Market			Sales	Dollars	6917.319	7387.669	7001.936
125 /Recreational/Inline Skates/Powerline, Green	/United States/Denver/Shopmart 4	Mass Market			Sales	Dollars	2957.823	3417.823	3264.482
126 /Recreational/Inline Skates/Powerline, Green	/United States/San Diego/Bikemart 2	Mass Market			Sales	Dollars	12183.031	12183.031	12183.031
127 /Recreational/Inline Skates/Powerline, Green	/United States/San Diego/Shopmart 2	Mass Market			Sales	Dollars	12183.031	12183.031	12183.031

Forecast data in Microsoft Excel.

*See Also*

Add-In programs for Microsoft Excel, accessible from the Help menu within Microsoft Excel, for more information about add-in programs.

## Window Used When Working with the Consensus Conference Room

Window	Navigation	Description
Resources	Consensus Conference Room main page, Resources	Displays the Resources page, which enables you to download the XML parser and the Excel Client.

## Windows Used When Working with the Excel Client

Window	Navigation	Description
Download Forecasts	Demand Management, Download Forecast	Displays the Download Forecasts dialog box, which enables you to set the parameters to download forecast information from the Consensus Conference Room to an XML file on your local or network drive.
Upload Forecasts	Demand Management, Upload Forecast	Displays the Download Forecasts dialog box, which enables you to set the parameters to upload forecast information in an XML file to the Consensus Conference Room.
Import Forecast	Demand Management, Import Forecast	Displays the Import Forecast dialog box, which enables you to open an XML file on a local or network drive that contains forecast information.
Export Forecast	Demand Management, Export Forecast	Displays the Export Forecast dialog box, which enables you to save forecast information to an XML file on a local or network drive.

## Understanding How to Download the Microsoft XML Parser

The Microsoft XML Parser is a processor that reads an XML document and determines the structure and properties of the data. The parser ensures that forecast data that you download and import into the Excel Client is in the correct format.

You download the Microsoft XML Parser from the Resources page of the Consensus Conference Room. The Resources page indicates the version of the Microsoft XML Parser that is installed on your machine. If the Microsoft XML Parser is not installed on your machine, you can download it from the link provided on the Resources page.

### Task 1: Downloading the Microsoft XML Parser

Access the Consensus Conference Room Resources page.

To download Microsoft XML Parser:

1. Right-click the Microsoft XML parser - Install Version 3 (req'd for Excel add-in) link.

2. Select Save Target As from the shortcut menu to download the file.
3. Open the downloaded file and follow the install instructions in the Setup wizard.

## Task 2: Downloading the Excel Client

Access the Consensus Conference Room Resources page.

To download the Excel Client:

1. Right-click the ForecastWeb Excel Add-In link.
2. Select Save Target As from the shortcut menu to download the file.
3. Open the downloaded file and follow the install instructions in the Setup wizard.

## Task 3: Loading the Excel Client

To load the Excel Client:

1. Start Microsoft Excel.
2. Select Add-Ins from the Tools menu.
3. Click the DM:Forecast Provider Add-In check box.

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### Note

If the DM: ForecastProvider Add-In does not appear in the list, click Browse, navigate to the location where you saved the Excel Client add-in file, and choose it from this location.

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4. Click OK.

# FORMATTING THE EXCEL WORKSHEET

This section contains an overview and explains how to format a worksheet in Excel using the Excel Client.

## Understanding How to Format the Excel Worksheet

After the Excel Client is loaded into Microsoft Excel, you can launch the workbook from the Demand Management menu.

The workbook contains a preformatted sheet with these horizon titles:

- Aggregation Hierarchy
- Time Bucket
- Count
- Start Date
- Forecast Version

Information that you import into the Excel workbook must conform to the ForecastWeb file structure. If the information does not conform to the demand model format, Excel does not import the data. The order of the columns in the worksheet should not be altered. Changing the order of the columns might prevent you from uploading or exporting data.

Forecast data is grouped by demand point and might contain data for multiple forecast versions. Each set of forecast data displays this information:

- Product path and ID.
- Location path and ID.
- Channel path and ID.
- Effective from.
- Effective through.
- Forecast version.
- Unit of measure and value.
- Time series data.

## Task 1:      Formatting the Excel Worksheet

To format the Excel Worksheet, select Format Worksheet from the Demand Management menu.

A blank worksheet opens.

# IMPORTING AND EXPORTING OF FORECAST DATA

This section contains an overview, and explains how to:

- Import forecast data into Excel.
- Export forecast data from Excel.

## Understanding the Import and Export of Data

The ability to import and export forecast data removes many working constraints that demand planners might encounter when working in one application. You can use the import and export features of the Excel Client to work with forecast data outside of Microsoft Excel. For example, exporting forecast data to an XML file allows you to save specific demand point data for multiple forecast versions within one portable file. Working offline allows you to view and compare forecast data, edit the data, and create reports without being connected to the database.

After you finish revising forecast data, you can import the data from the XML file back into the Excel Client. Forecast data in the Excel Client can then be transferred into the Design Studio, Forecast Studio, or the Consensus Conference Room.

## Task 1: Importing Forecast Data

Access the Import Forecast dialog box.

To import forecast data:

1. Complete these fields:
  - Look in
  - File name
  - File type
2. Click Open.

## Task 2:      Exporting Forecast Data

Open the workbook that contains the data that you want to export and then access the Export Forecast dialog box.

To export forecast data:

1.      Complete these fields:
  - Save In
  - File name
  - Save as type
2.      Click Save.

# DOWNLOADING AND UPLOADING FORECAST DATA

This section contains an overview and explains how to:

- Download forecast data.
- Upload forecast data.

## Understanding the Download and Upload of Forecast Data

Configuring forecast data in either the Consensus Conference Room or the Forecast Studio is time-consuming because you can edit forecast data for only one demand point at one time. Working in the Excel Client is a convenient way of viewing and configuring demand points for multiple forecast versions. When you review demand points for multiple forecast versions, you gain a better perspective of forecast data for specific demand points from multiple sources.

You can upload and download forecast data by connecting to the database and transferring data to the Excel Client. You can upload or download only forecast data to which you have permissions. Depending upon your security settings (set by the system administrator), you might not be able to upload or download certain forecast data. Security settings prevent forecast providers and demand planners from viewing and configuring forecast data to which they do not have access.

### *Prerequisites*

Before you can upload and download forecast data, you must ensure that:

- The system administrator has set up your demand point permissions.
- You know the name of the host URL for the forecast server. Contact your system administrator if you cannot connect to the server.
- You know the aggregation hierarchy name, unit of measure, and forecast version name that you want to work with.

## Task 1: Downloading Forecast Data

Begin by opening a formatted worksheet.

Access the Download Forecast dialog box.

To download forecast data:

1. Complete these fields:
  - Username
  - Password
  - Aggregation Hierarchy
  - Forecast Version
  - Unit of Measure
  - Host

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**Note**

All fields are case sensitive.

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2. Click OK.

## Task 2: Uploading Forecast Data

Open the workbook that contains the data that you want to upload and then access the Upload Forecast dialog box.

To upload forecast data:

1. Complete these fields:
  - Username
  - Password
  - Host
2. Click OK.

---

**Note**

When you upload data:

- Missing forecast data is uploaded into the database and appears as *missing*.
- Any user-defined fields that you added to the Excel workbook do not appear in the database when you upload the data.
- If existing data for the same forecast version and demand points have already been uploaded to the Consensus Conference Room and you upload new data, the action overwrites the existing data. If the original data in the Consensus Conference Room has been changed, a symbol appears beside the forecast version name in the Workshop's table, compare, edit, or review views. This symbol indicates

that the data has changed. If data already exists in the Consensus Conference Room and you attempt to upload new data using a different start date, period size, period length, or business model structure, the system redistributes the forecast data into different buckets.

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