

# **Oracle® Demantra Predictive Trade Planning**

User's Guide

Release 7.1.1

**Part No. E05137-01**

March 2007

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# Contents

**Send Us Your Comments**

**Preface**

**Part 1 Introduction and Basics**

**1 PTP Introduction**

Overview.....	1-1
Dashboard: Collaborator Workbench.....	1-2
Predictive Trade Planning Business Processes and Worksheets.....	1-3
Promotion Modeling and Optimization Business Processes and Worksheets.....	1-5
Forecasting and Simulation.....	1-7
Optimization.....	1-7

**2 Predictive Trade Planning Concepts**

Worksheet Basics.....	2-1
PTP Data Hierarchy.....	2-2
Promotions.....	2-6
Retailer Profiles.....	2-8
Funding.....	2-8
Promotion Costs and Spending.....	2-9
Volume and Volume Breakdown.....	2-9
Data Access.....	2-11

### **3 Logging On and Getting Started**

Initial Logon and Download.....	3-1
Logging Onto PTP.....	3-3
Tutorial: Getting Acquainted with Worksheets.....	3-3
Controlling Synchronization of Embedded Worksheets.....	3-6
Logging Off PTP.....	3-7
Ending a Hung Session.....	3-7
Changing Your Password.....	3-8

### **4 Working with Data**

Editing Data.....	4-1
Saving and Viewing Changes.....	4-3
Sorting Worksheet Data.....	4-4
Copying and Pasting Data.....	4-5
Copying and Pasting to and from Microsoft Excel.....	4-6
Exporting Data to Microsoft Excel.....	4-6
Linking Data into Third-Party Reporting Tools (via DOL).....	4-7
Printing.....	4-10
Viewing Notes.....	4-11
Editing Notes.....	4-13
Viewing and Managing Attachments to Notes.....	4-14
Specifying Note Permissions.....	4-16
Refreshing the Local Worksheet Cache.....	4-17
Viewing the Audit Trail.....	4-17

### **5 Managing the Screen**

Managing Multiple Worksheets.....	5-1
Managing Worksheet Views.....	5-3
Managing View Elements.....	5-4
Changing the Graph Style.....	5-4
Managing Empty Rows.....	5-5
Worksheet, Layout, and Data.....	5-6
Worksheet Definition, Layout, and Local Adjustments.....	5-7

## **Part 2 PTP and PMO Business Processes**

### **6 Oracle Demantra Dashboard**

Introduction to the Dashboard.....	6-1
------------------------------------	-----

Reviewing Metrics.....	6-3
Reviewing the Planning Hierarchy.....	6-4
Editing Retailer Information.....	6-5
Opening Worksheets.....	6-8
Managing Tasks.....	6-9
Creating and Sending a Task.....	6-9
Personalizing the Dashboard.....	6-11
Configuring Your Default Layout.....	6-11
Configuring My Tasks.....	6-13
Configuring My Worksheets.....	6-14
 <b>7 PTP: Managing and Viewing Quotas and Funds</b>	
Overview.....	7-1
Managing Quotas and Funds at the Retailer Level.....	7-3
Managing Quotas and Funds at the Promotion Group Level.....	7-6
Viewing Quotas and Funds.....	7-7
Reference.....	7-8
 <b>8 PTP: Tracking Volume</b>	
Overview.....	8-1
Reference.....	8-5
 <b>9 PMO: Planning Promotions</b>	
Introduction to the Planning Environment.....	9-1
Creating a Promotion.....	9-6
Marking a Promotion as Planned.....	9-8
Approving a Promotion.....	9-9
Committing a Promotion.....	9-9
Marking a Promotion as Partially Paid or Paid.....	9-10
Closing a Promotion.....	9-10
Making Other Changes to a Promotion.....	9-10
Copying and Pasting a Promotion.....	9-13
Deleting a Promotion.....	9-13
Reference.....	9-14
 <b>10 PMO: Simulation and Optimization</b>	
Overview.....	10-1
Running the Analytical Engine in Simulation Mode.....	10-3
Running a Simulation.....	10-3

Optimizing a Promotion.....	10-4
Viewing Optimization Results.....	10-7
Accepting an Optimized Promotion.....	10-9
Reference.....	10-10

## **11 PMO: Examining and Comparing Promotions**

Overview.....	11-1
Examining Promotions from the Manufacturer's Point of View.....	11-2
Examining Promotions from a Retailer's Point of View.....	11-6
Comparing Promotions in a Scenario.....	11-8
Reference.....	11-10

## **12 PMO: Reviewing Past Performance**

Overview.....	12-1
Evaluating Performance from the Manufacturer's Point of View.....	12-2
Evaluating Performance from a Retailer's Point of View.....	12-5
Viewing Actual Averages.....	12-8
Reference.....	12-9

# **Part 3 Advanced Topics and Reference**

## **13 Creating Worksheets and Content Panes**

Introduction.....	13-2
Working with Lists.....	13-3
Creating or Editing a Worksheet or Content Pane.....	13-3
Configuring the Basics.....	13-4
Selecting Series on a Worksheet.....	13-6
Managing the Series Lists.....	13-7
Specifying the Time Resolution and Time Span.....	13-9
Specifying Aggregation Levels.....	13-11
Using the Advanced Selection Options.....	13-12
Changing the Overall Scale or Unit of Measure.....	13-14
Filtering the Worksheet or Content Pane.....	13-16
Managing the List of Members.....	13-18
Applying Exception Filters.....	13-18
Defining the View Layout.....	13-20
Adding and Managing Worksheet Views.....	13-22
Specifying the Worksheet Elements in a View.....	13-24
Displaying an Embedded Worksheet.....	13-25

Filtering a Worksheet View.....	13-26
Sharing Worksheet and Content Panes.....	13-28
Deleting Worksheet or Content Panes.....	13-28
General Tips on Worksheet Design.....	13-28
<b>14 Administration</b>	
Running the Analytical Engine.....	14-1
Running Required Workflows.....	14-2
Managing the PTP Users.....	14-8
<b>15 PTP Demo Script</b>	
Overall Notes.....	15-1
About World Brands.....	15-2
User IDs and Passwords.....	15-3
Configuring the PTP Demo for Demand Management.....	15-5
PTP: Setting Quotas and Funds.....	15-11
PMO: Creating, Simulating, and Optimizing a Promotion.....	15-15
PMO: Committing a Promotion.....	15-34
PMO: Examining Past Promotions.....	15-35
<b>16 PTP Reference</b>	
Series.....	16-1
Item Levels.....	16-23
Location Levels.....	16-23
Retailer.....	16-24
Promotion Levels.....	16-26
Lookup Tables.....	16-31
Methods.....	16-33
Procedures.....	16-34
Triggers.....	16-35
Workflows.....	16-36
Engine Configuration.....	16-38

## Index





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## **Oracle Demantra Predictive Trade Planning User's Guide, Release 7.1.1**

### **Part No. E05137-01**

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# Preface

## Intended Audience

Welcome to Release 7.1.1 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

- 1 PTP Introduction**
- 2 Predictive Trade Planning Concepts**
- 3 Logging On and Getting Started**
- 4 Working with Data**
- 5 Managing the Screen**
- 6 Oracle Demantra Dashboard**
- 7 PTP: Managing and Viewing Quotas and Funds**
- 8 PTP: Tracking Volume**
- 9 PMO: Planning Promotions**
- 10 PMO: Simulation and Optimization**
- 11 PMO: Examining and Comparing Promotions**
- 12 PMO: Reviewing Past Performance**
- 13 Creating Worksheets and Content Panes**
- 14 Administration**
- 15 PTP Demo Script**
- 16 PTP Reference**

## 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

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## Introduction and Basics





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## 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:

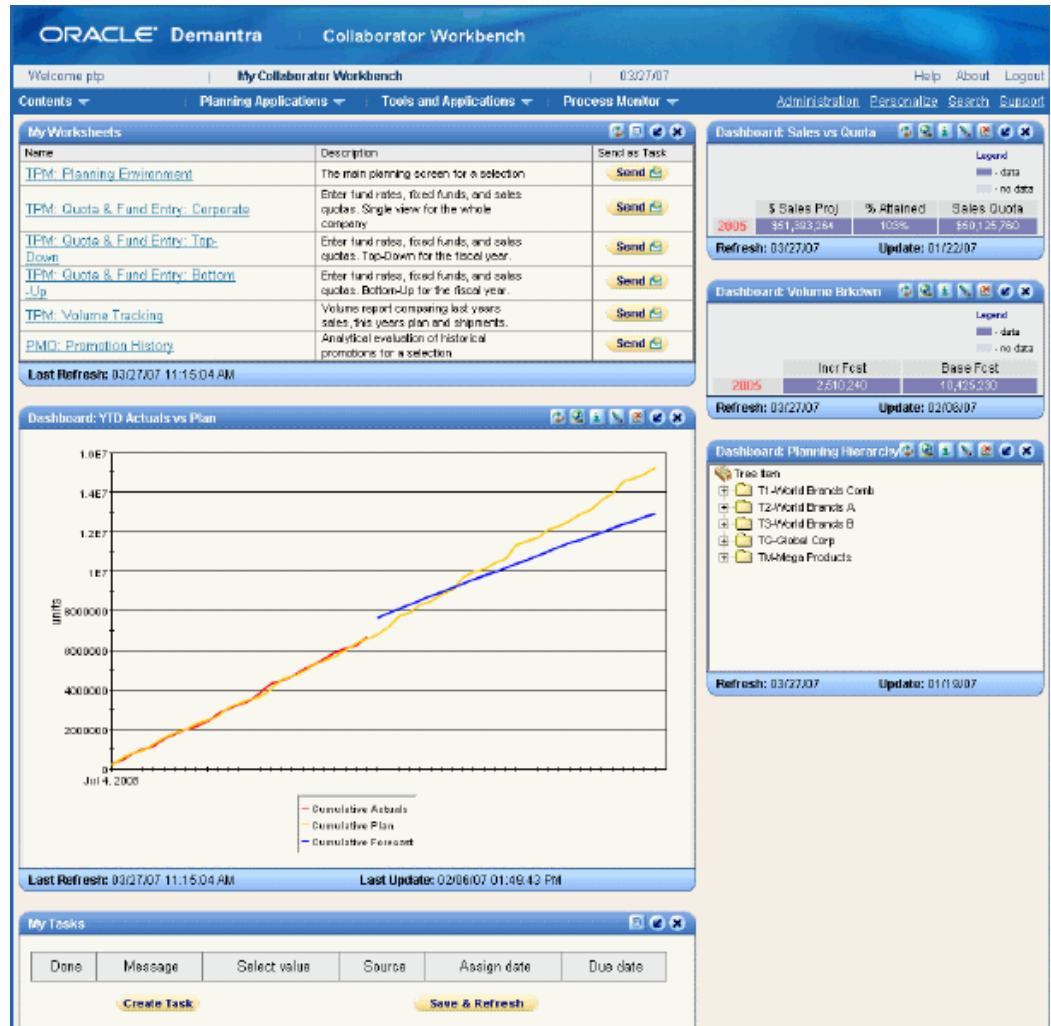
- Historical event evaluation, including detailed analysis of lift components, taking into account both direct and indirect effects
- Base volume forecast by item over time based on past history
- Event planning
- Incremental volume forecast based on user-defined promotional variables and causals (by 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. Collaborator Workbench looks like this:

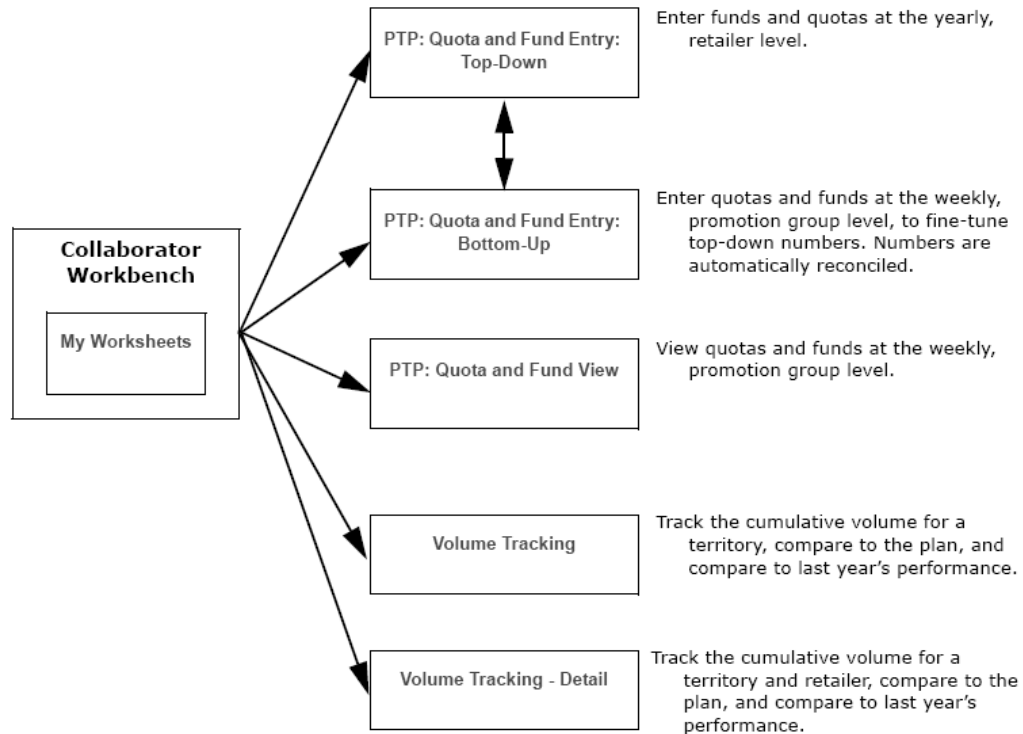


From here, you can launch worksheets and review tasks. Each worksheet is a working environment designed to support specific business processes. In general, you can open worksheets from within Collaborator Workbench or from worksheets that are currently open.

For details, see Oracle Demantra Dashboard.

## 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:



breakout of cannibalization 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
- 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 reoptimize the promotion. Once satisfied with the results of a promotion, you can add it to your current plan. See PMO: Simulation and Optimization.
- 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.
- PMO: Promotion History displays the past averages for each promotion type, in a number of different contexts. See PMO: Reviewing Past Performance.

## 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



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## Predictive Trade Planning Concepts

This chapter covers the following topics:

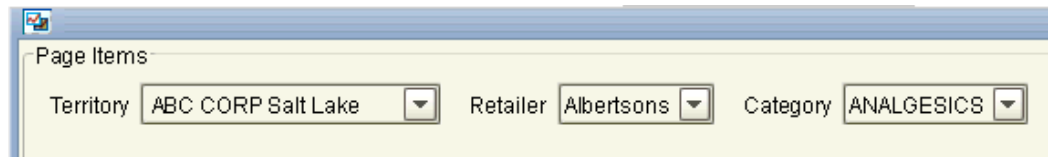
- Worksheet Basics
- PTP Data Hierarchy
- Promotions
- Retailer Profiles
- Funding
- Promotion Costs and Spending
- Volume and Volume Breakdown
- Data Access

### 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. The following example shows part of a worksheet that uses the territory, retailer, and category levels:



The screenshot shows a software interface with a title bar and a section labeled "Page Items". Below this label are three dropdown menus. The first menu is labeled "Territory" and has "ABC CORP Salt Lake" selected. The second menu is labeled "Retailer" and has "Albertsons" selected. The third menu is labeled "Category" and has "ANALGESICS" selected. Each menu has a small downward-pointing arrow on its right side.

Here, 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, for example:

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

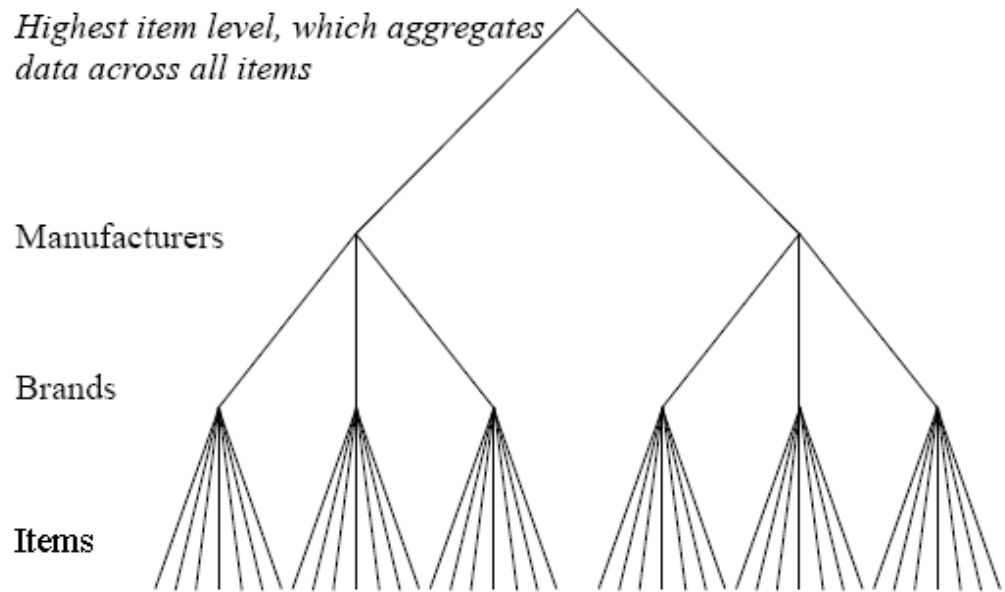
organized into several hierarchies, and locations are organized into another set of hierarchies. This section provides an overview.

### **Product Hierarchies**

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

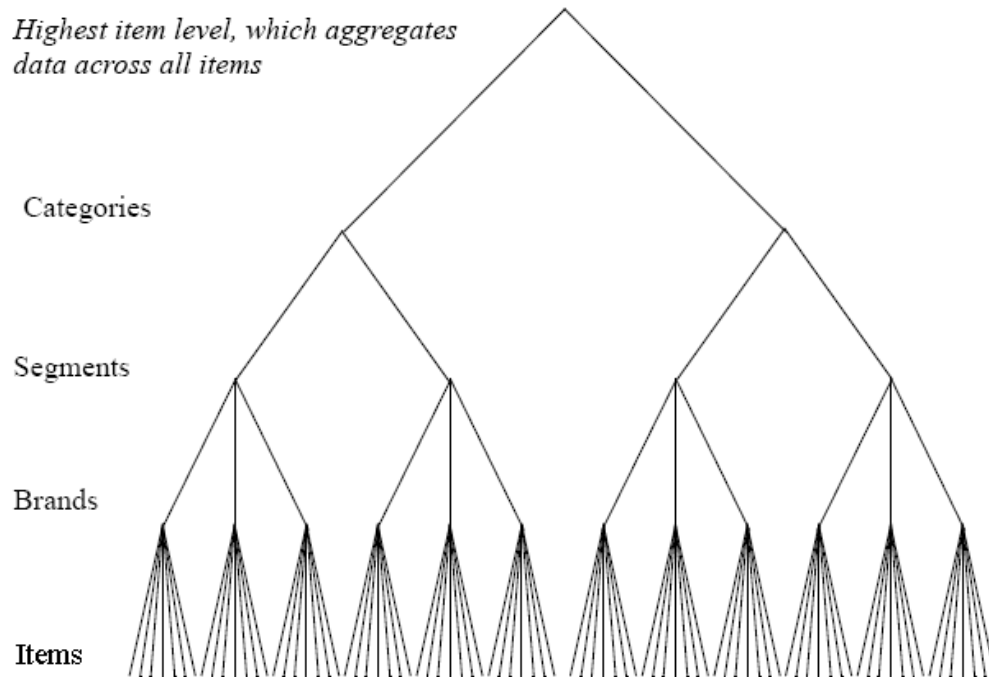
### **The Manufacturer Hierarchy**

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

## The Product Line Hierarchy

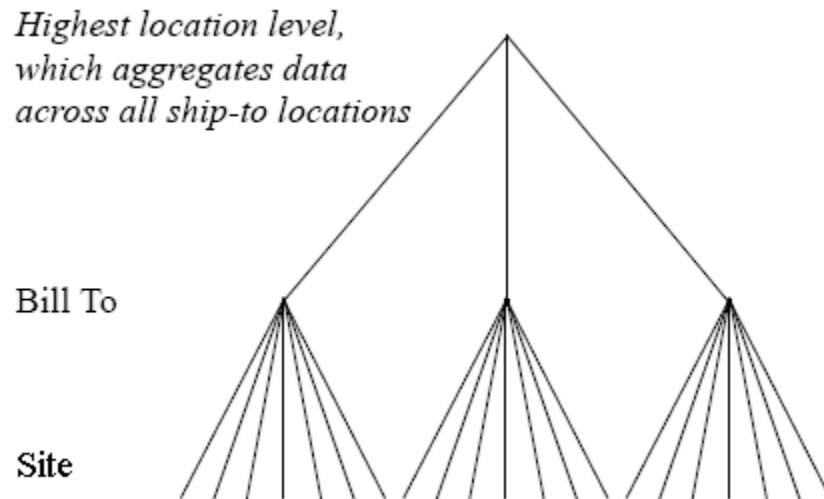
In the product line hierarchy, items are organized into product subgroups, which are organized into product groups, which are organized into product lines.

## Location Hierarchies

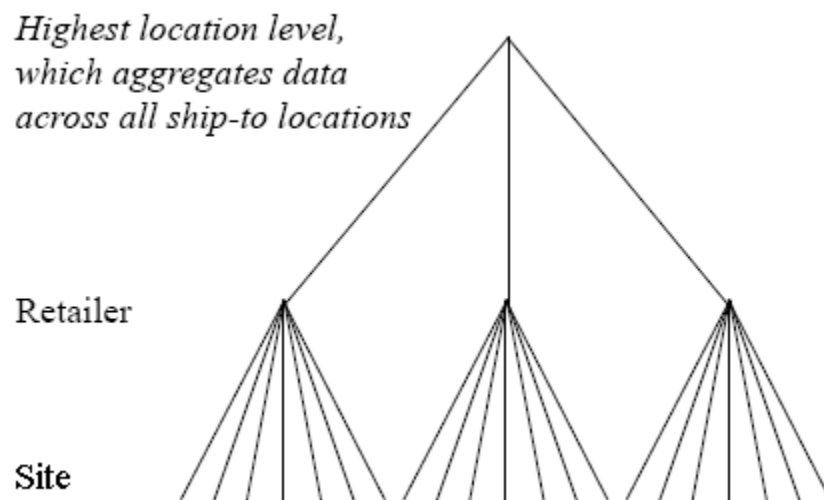
PTP provides two location levels that are both at the same (apparent) lowest level. These levels are Ship To and Territory. Internally, PTP has only one lowest location level, which is a combination of Ship To and Territory, created automatically by Oracle Demantra.

## Ship To Hierarchies

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



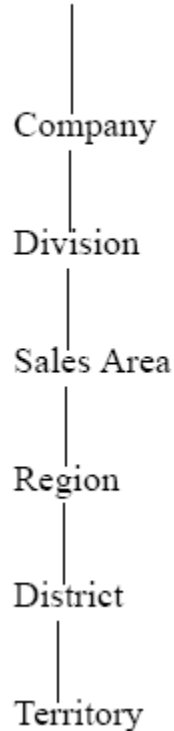
Ship To locations are also organized by retailer.



## 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:

*Highest location level, which  
aggregates data across all territories*



## 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 Optimization.

## 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 Evt 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:

$\text{rate} * \text{volume} + \text{fixed funds}$

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

For specific details on funds, see "About Quotas and Funds".

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

## 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:

$\text{vehicle costs} + \text{volume} * \text{buydown}$

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."

## 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. The following shows an example:

Company	Brand	Promotion Group	Till Evt \$	Incr Evt \$	Base Evt \$	Net Incr Evt \$	Canbl \$	Pre-Post \$	Canbl Vol Mfg	Pre-Post Vol
World Brands	EXEDRA	EXEDRA 100	\$47,493	\$35,545	\$11,517	\$33,221	\$0	\$2,324	0	-541
		EXEDRA 24	\$0	\$0	\$0	(\$165)	\$195	\$0	-87	0
		EXEDRA 50	\$0	\$0	\$0	(\$420)	\$420	\$0	-141	0
		Summary				\$32,507	\$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. The following shows an example:

Feb End Sale-Albertsons-ANALGESICS

Lift Decomo - Rtl

Albertsons - ANALGESICS - Feb End Sale

Company	Brand	Promotion Group	Ttl Ext \$ Rtl	Incr Ext \$ Rtl	Base Ext \$ Rtl	Net Incr Ext \$ Rtl	Canbl \$ Rtl	Pre-Post \$ Rtl	Canbl Val Rtl	Pre-Post Val
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	-.07	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	\$35,657	\$4,666	\$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.



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## 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 Worksheets and Content Panes.

Working with Data

## Logging Onto PTP

If you have already performed the initial setup (see "Initial Logon and Download"), 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`

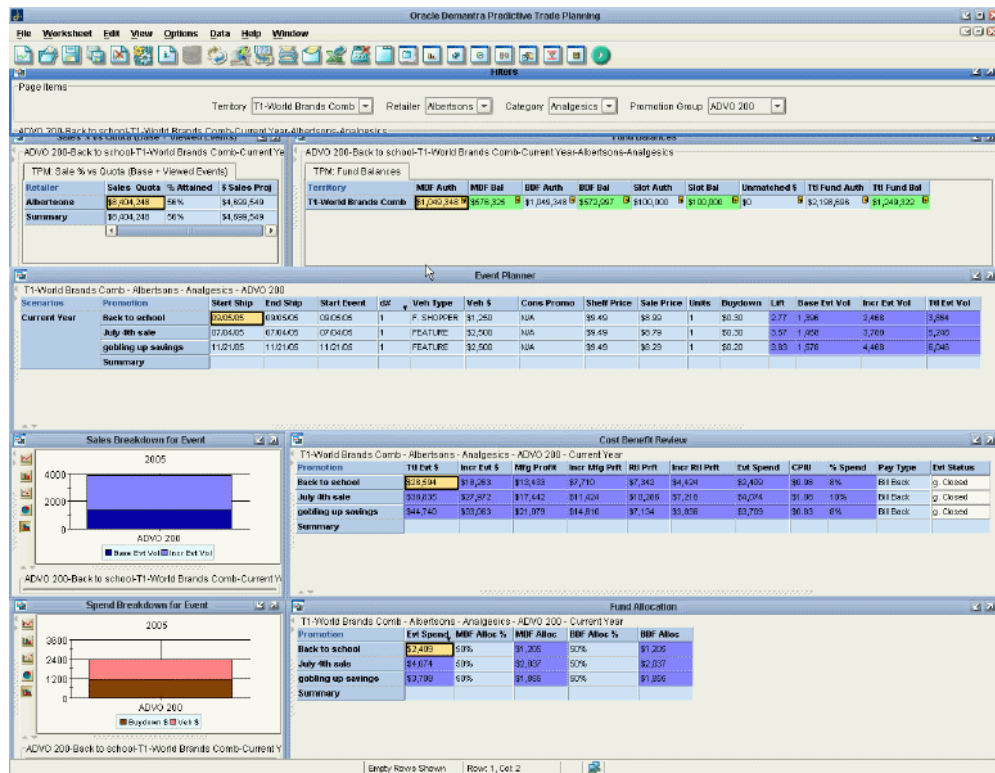
**Tip:** Your Windows Start menu may also include a shortcut to this URL.

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 usually has the following form (or 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 following 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](#).

- 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.
- Right-click a promotion in the non-scrolling part of a worksheet table like this one:

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	

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 also

Ending a Hung Session.

## 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:

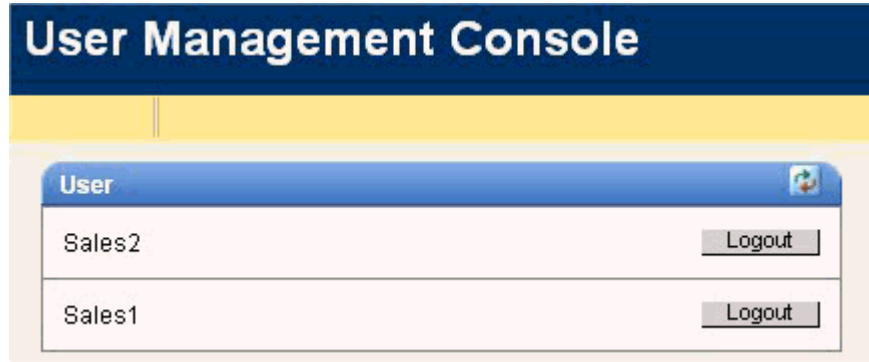
`http://server name/virtual directory/portal/userManagement.jsp`

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 following 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.



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## 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 also**

"Copying and Pasting Data"

"Saving and Viewing Changes"

## **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 Worksheets and Content Panes".
  - If you do not own the worksheet, this option saves only your own layout of the worksheet.

See "Worksheet Definition, Layout, and Local Adjustments".

### **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.

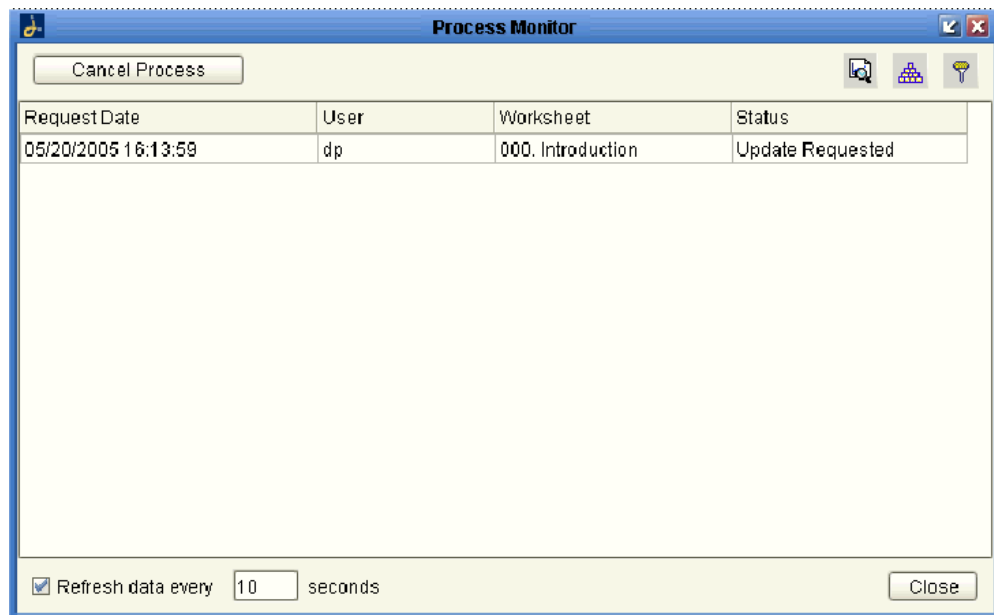
### To switch the Recalc option on

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 Sales
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 also

"Saving and Viewing Changes"

## 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"

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

## 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 also

"Copying and Pasting to and from Microsoft Excel"

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

## 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](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.

**New Web Query**

1. Enter the address for the Web page that contains the data you want. If browsing, switch back to Excel once you have located the Web page in your browser.

2. Choose the part of the Web page that contains the data you want. Note that pre-formatted sections are treated as tables.

☒ The entire page  
☐ Only the tables  
☐ One or more specific tables on the page.

Enter table name(s) or number(s) separated by commas:

3. Choose how much formatting from the Web page you want your data to keep:

☐ None  
☐ Rich text formatting only  
☒ Full HTML formatting

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:

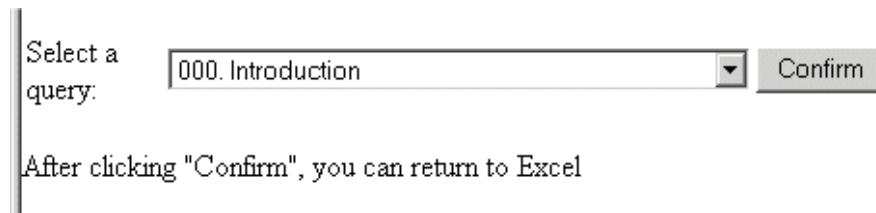
[http://frodo/demantra/portal/DOL\\_HTML.htm](http://frodo/demantra/portal/DOL_HTML.htm)

A login page appears.



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

The browser now displays the following list of worksheets:



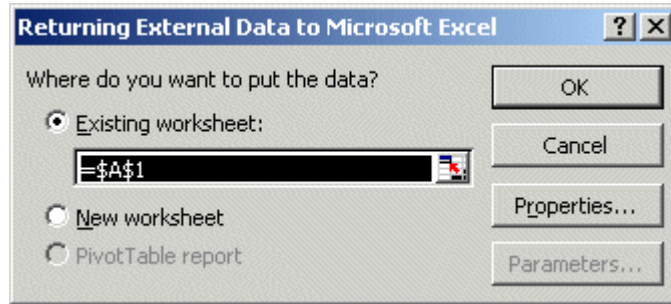
After clicking "Confirm", you can return to Excel

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 also

"Copying and Pasting to and from Microsoft Excel"

"Exporting Data to Microsoft Excel"

## 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.

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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

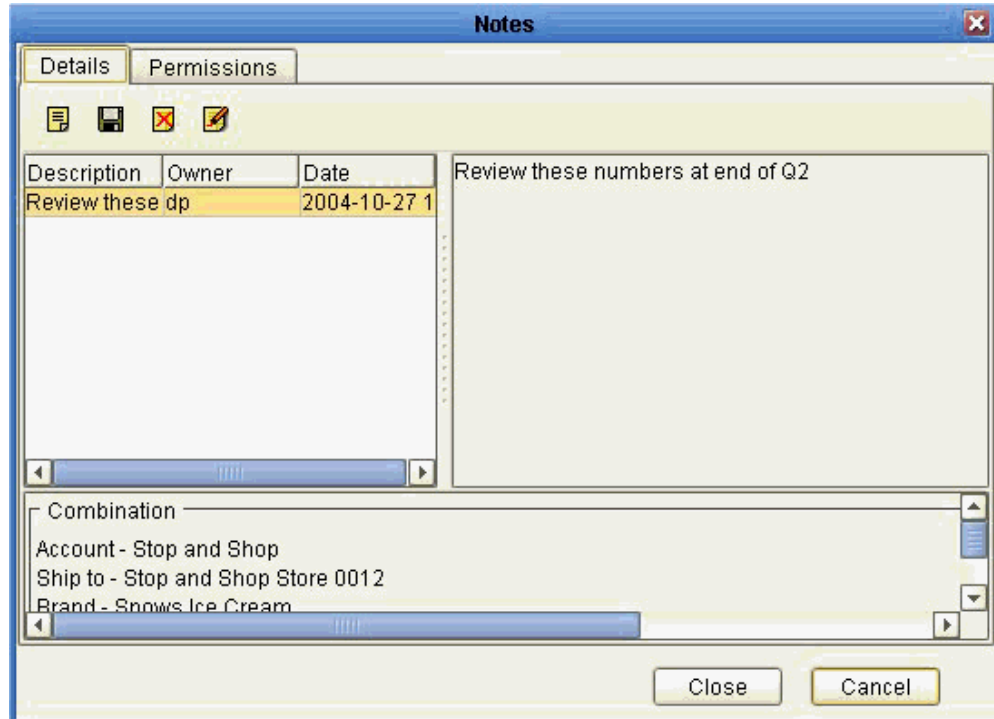
You can add notes to record comments and reminders. You attach the note to combination and date or dates. The worksheet table displays indicator symbols on those dates, generally in only some of the columns (depending on how your system is configured). The following shows an example of the indicator:

471,400	
158,100	
603,000	Ⓜ
161,500	
259,800	

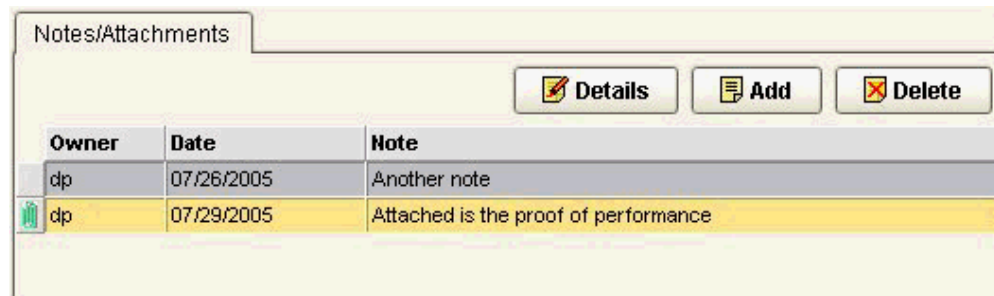
The graph displays an indicator as well.

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."

### See also

"Editing Notes"

"Viewing and Managing Attachments to Notes"

"Specifying Note Permissions"

## Editing Notes

First display the Notes page or the Notes/Attachments subtab; see "Viewing Notes". 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."
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".
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 also**

"Viewing Notes"

"Specifying Note Permissions"

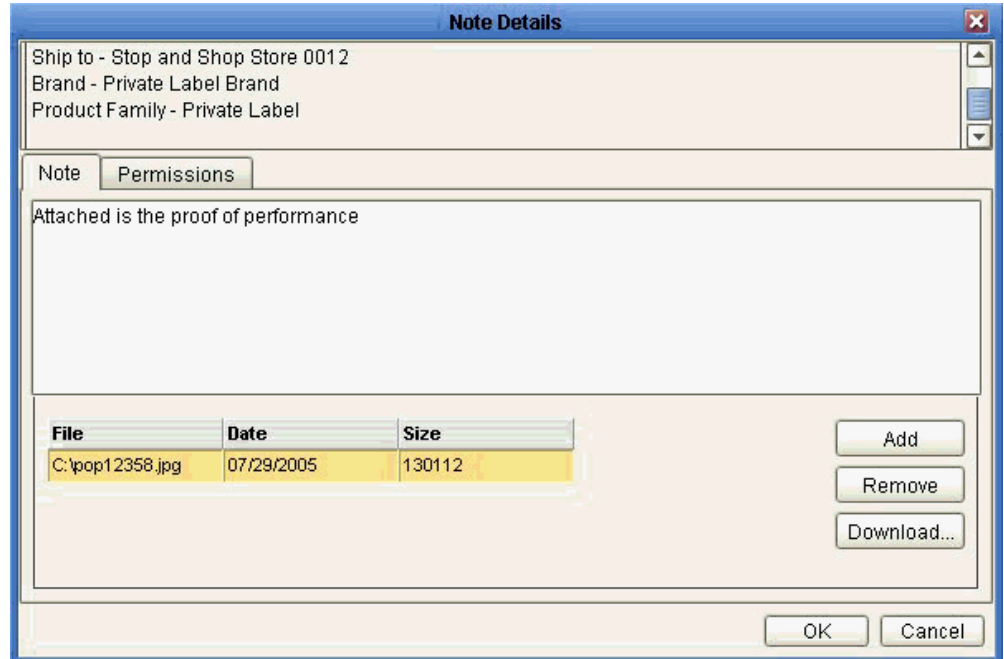
## Viewing and Managing Attachments to Notes

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 attachment 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 also**

"Viewing Notes"

"Specifying the Worksheet elements in a View"

## 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 also

"Viewing Notes".

## 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 also

"Saving and Viewing Changes"

"Configuring the Basics"

## 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:

Audit Date	User Name	Update Mode	Unit Name	Index Name	Series List	Status
11/17/03 14:41:09	dp	Manual	Cases		Final Plan, Fixed F	Successful
11/17/03 14:35:21	dp	Manual	units		Final Plan	Successful
11/17/03 14:34:45	dp	BLE	units		Final Plan	Successful
11/17/03 14:34:45	dp	BLE	units		Final Plan	Successful
11/17/03 14:34:45	dp	BLE	units		Final Plan	Successful
11/17/03 14:34:44	dp	BLE	units		Final Plan	Successful

Series Name	Series Value	Original Value	From Date	To Date
Final Plan	14,424,930	14,424,930	05/05/03 00:00:00	06/01/03 00:00:00
Final Plan	20,200,134	20,200,134	06/02/03 00:00:00	07/06/03 00:00:00
Final Plan	18,274,362	18,274,362	07/07/03 00:00:00	08/03/03 00:00:00
Final Plan	16,963,526	16,963,526	08/04/03 00:00:00	08/31/03 00:00:00
Final Plan	23,479,568	23,479,568	09/01/03 00:00:00	10/05/03 00:00:00
Final Plan	20,024,052	20,024,052	10/06/03 00:00:00	11/02/03 00:00:00
Final Plan	22,519,804	22,517,804	11/03/03 00:00:00	11/30/03 00:00:00
Fixed Plan Lift	2,000		11/03/03 00:00:00	11/30/03 00:00:00
Final Plan	19,892,716	19,892,716	12/01/03 00:00:00	01/04/04 00:00:00

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 for a Specific Combination".

### **To delete an audit trail profile**

1. Click File > Audit Trail.
2. Click an audit trail profile.
3. Click Delete.
4. Click Yes.



---

## 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

This chapter describes how to manage the Oracle Demantra screen in general. It includes the following sections:

**See also**

"Creating Worksheets and Content Panes"

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:

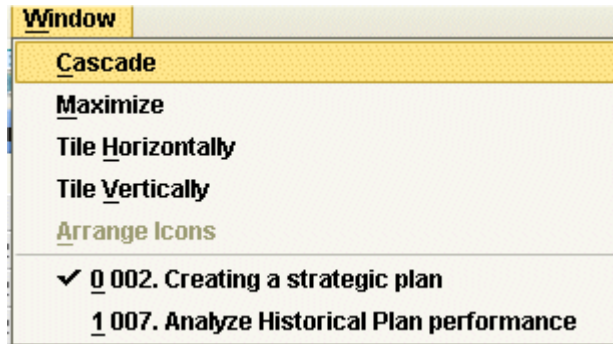
- Select Options > Tabs View/Windows View.
- Click the Tabs/Windows toggle button.
  - display worksheets as windows

- 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 also

"Managing Worksheet Views"

"Managing View Elements"

"Adding and Managing Worksheet Views"

## 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 resize 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".
- 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 also

"Managing Multiple Worksheets"

"Managing View Elements"

## 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 also

"Managing Multiple Worksheets"

"Managing Worksheet Views"

"Adding and Managing Worksheet Views"

## 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 ShownRow: 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 also

"Worksheet Definition, Layout, and Local Adjustments"

"Saving and Viewing Changes"

## 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

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## PTP and PMO Business Processes



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## 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

### 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. Initially, this page looks like this:



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.



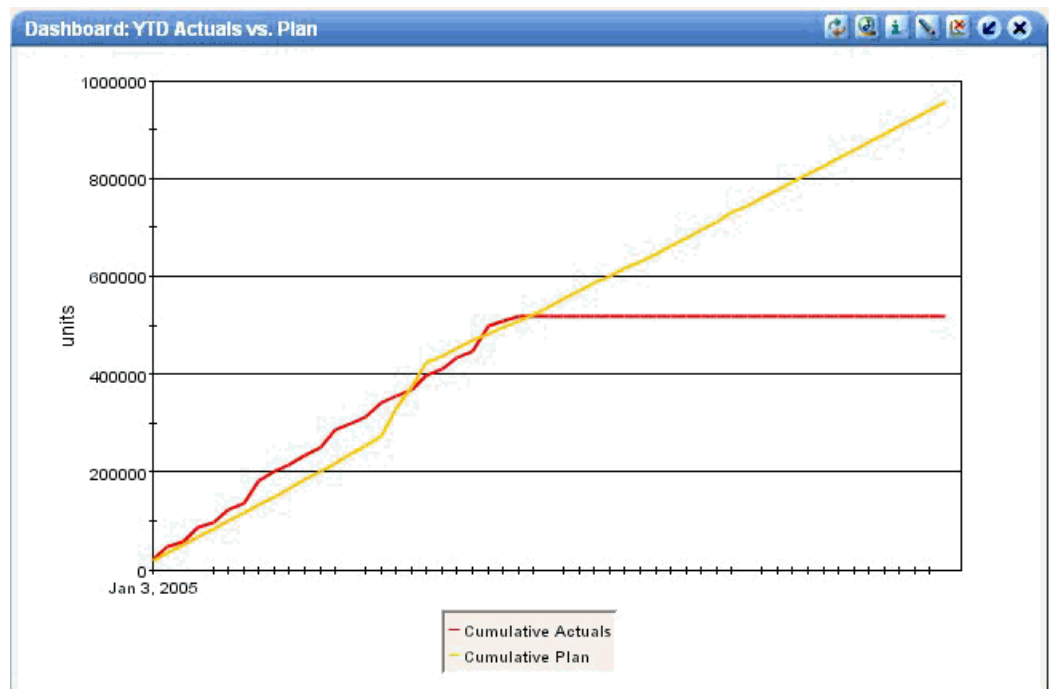
7. Click Yes (or Always) or Start.

## 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.

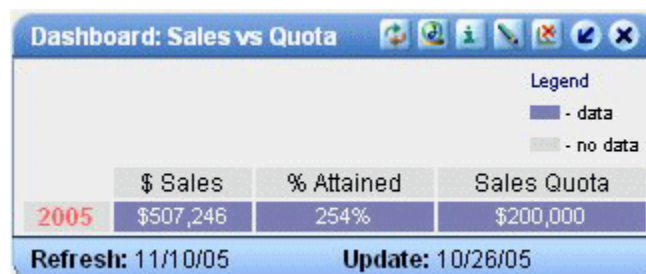
### Actuals versus Plan

This summary pane is a graph that shows cumulative actual volume and planned volume, as follows:



### Sales versus Quota

This summary pane shows current sales compared to the sales quota, as follows:



## Volume Breakdown

This summary pane displays a table that shows the breakdown of volume into base volume and incremental volume, as follows:

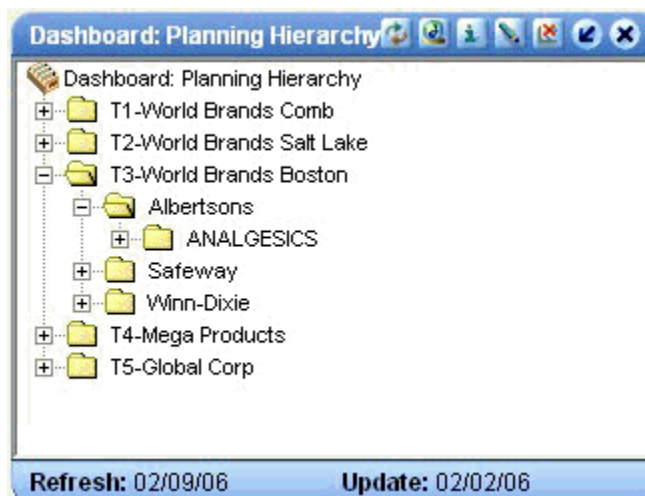


The screenshot shows a window titled "Dashboard: Volume Brkdw". It contains a table with two columns: "Incr Fcst" and "Base Fcst". The row for the year "2005" shows values of 207,744 and 311,224 respectively. A legend indicates that blue shading represents "data" and grey shading represents "no data". The bottom of the window shows "Refresh: 11/10/05" and "Update: 09/07/05".

	Incr Fcst	Base Fcst
2005	207,744	311,224

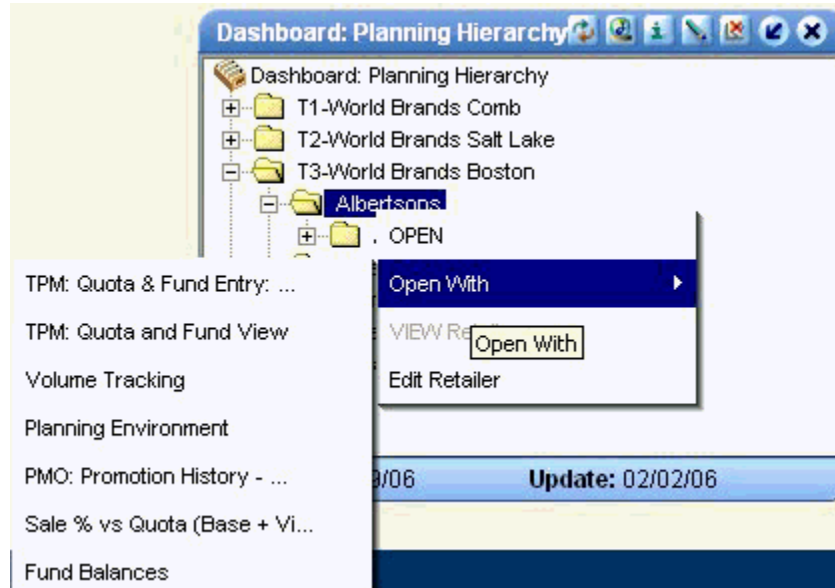
## Reviewing the Planning Hierarchy

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 following screen:

Edit Retailer : Albertsons (Input)	
Name	Albertsons
Class_of_Trade	Food
Number of Active Stores	1,500
Account Classification	Growth
Avg Everyday Selling Margin	24%
Min Rtl Event Margin	14%
Veh Costs: Feature & Display	\$10,000
Veh Costs: Feature Only	\$5,000
Veh Costs: Display Only	\$5,000
Veh Costs: TPR Only	\$5,000
Veh Costs: F Shopper	\$5,000
Key Competitors	Target
Use Default Profile	Yes

Cancel Ok

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 "Adminiatraion".

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:

---

<b>Name</b>	Name of the retailer.
<b>Class_of_Trade</b>	Dropdown list with the following choices: <ul style="list-style-type: none"><li>• Food</li><li>• Drug</li><li>• Mass</li><li>• C-Store</li><li>• Military</li></ul>
<b>Number of Active Stores</b>	Number of active stores that this retailer operates.
<b>Account Classification</b>	Dropdown list with the following choices: <ul style="list-style-type: none"><li>• Growth</li><li>• Holding</li><li>• Declining</li></ul>
<b>Avg Everyday Selling Margin</b>	Average selling margin, disregarding promotions.
<b>Min Rtl Event Margin</b>	Minimum margin that this retailer must make on an event. Promotion Optimization considers only events that provide at least this much margin.
<b>Veh Costs: Feature &amp; Display</b>	Default cost for an event of type F&D for this retailer.
<b>Veh Costs: Feature Only</b>	Default cost for an event of type Feature for this retailer.

---

<b>Veh Costs: Display Only</b>	Default cost for an event of type Display for this retailer.
<b>Veh Costs: TPR Only</b>	Default cost for an event of type TPR for this retailer.
<b>Veh Costs: F Shopper</b>	Default cost for an event of type F. Shopper for this retailer.
<b>Key Competitors</b>	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 also

"Configuring My Worksheets"

"Creating and sending a Task"

## 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"
- "Configuring My Tasks"
- "Configuring My Worksheets"

To add new summary panes, see "Creating Worksheets and Content Panes".

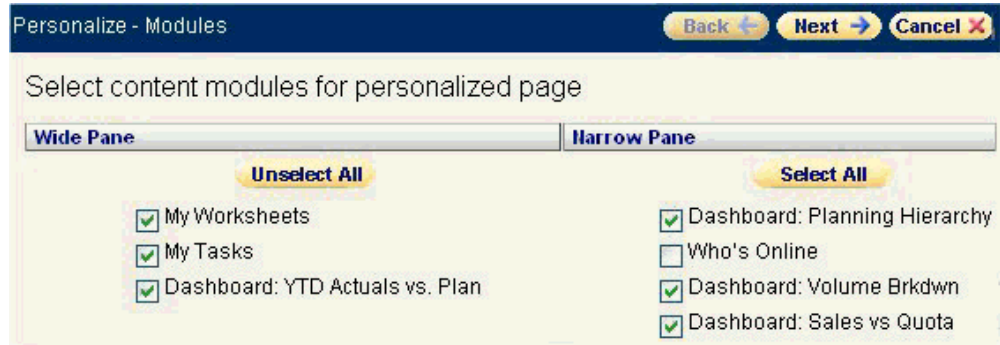
## Configuring Your Default Layout

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.



Personalize - Modules

Back Next Cancel

Select content modules for personalized page

Wide Pane Narrow Pane

Unselect All Select All

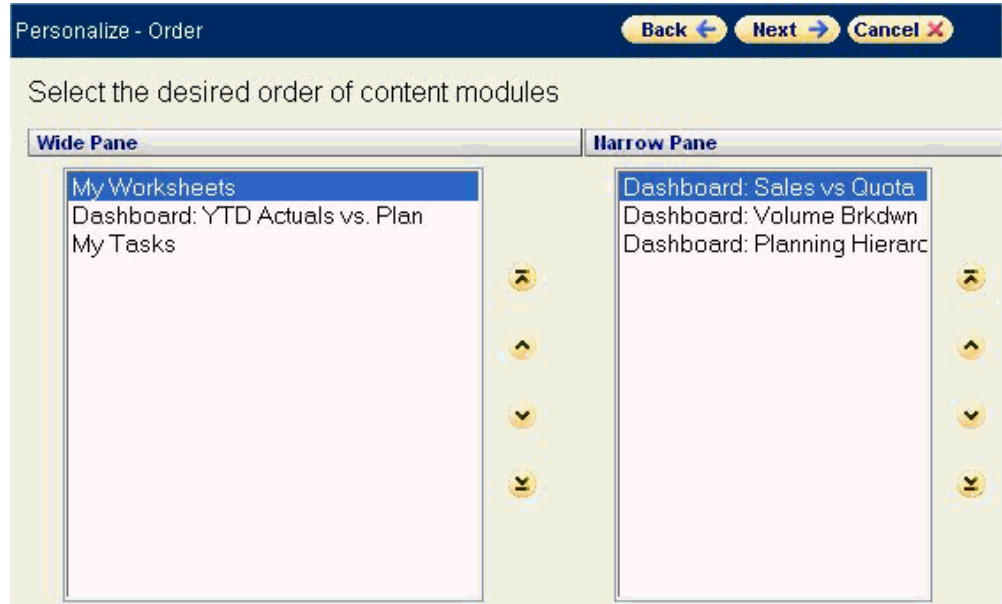
☒ My Worksheets  
☒ My Tasks  
☒ Dashboard: YTD Actuals vs. Plan

☒ Dashboard: Planning Hierarchy  
☐ Who's Online  
☒ Dashboard: Volume Brkdown  
☒ Dashboard: Sales vs Quota

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:

The image shows a configuration panel for 'My Tasks' with a light green background. It contains three settings: 'Number of Tasks to view:' with a text input field containing the number '5'; 'Order Tasks By:' with a dropdown menu showing 'Assign Date'; and 'Sort:' with a dropdown menu showing 'Ascending'.

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.

Personalize "My Worksheets" - Select Worksheets

Back Next Cancel

Select which worksheets will appear on "My Worksheets" View.

**Worksheet name:**

Select All

- ☐ Dashboard: Planning Hierarchy
- ☐ Dashboard: Sales vs Quota
- ☐ Dashboard: Volume Brkdw
- ☐ Dashboard: YTD Actuals vs. Plan
- ☐ Lift Decomposition
- ☒ Planning Environment
- ☐ PMO: Optimization Comparison
- ☐ PMO: Promo Effect - Retailer Perspective

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.

Personalize "My Worksheets" - Order and Number of Worksheets

Back Finish Cancel

Select the desired order of worksheets and number of worksheets to view

**Number of Worksheets to view:** 20 (0 - 100)

**Order:**

- Planning Environment
- Volume Tracking
- TPM: Quota and Fund View

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.



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## PTP: Managing and Viewing Quotas and Funds

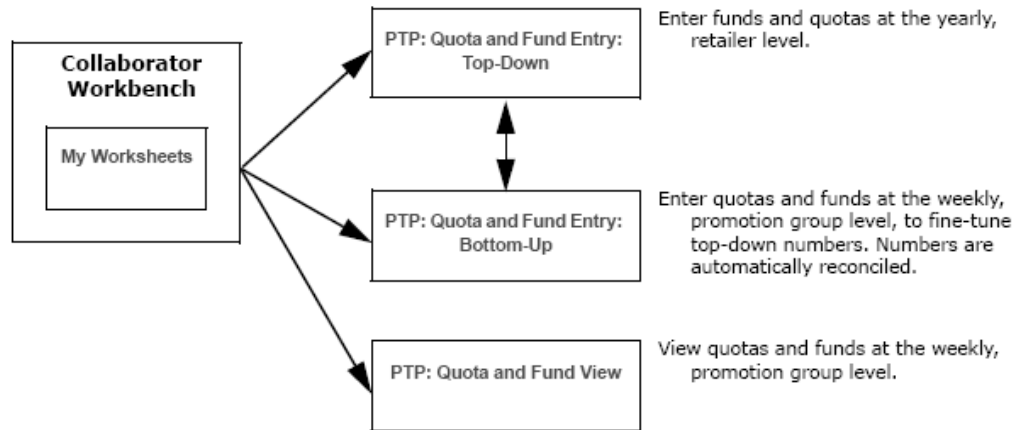
This chapter covers the following topics:

- 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:

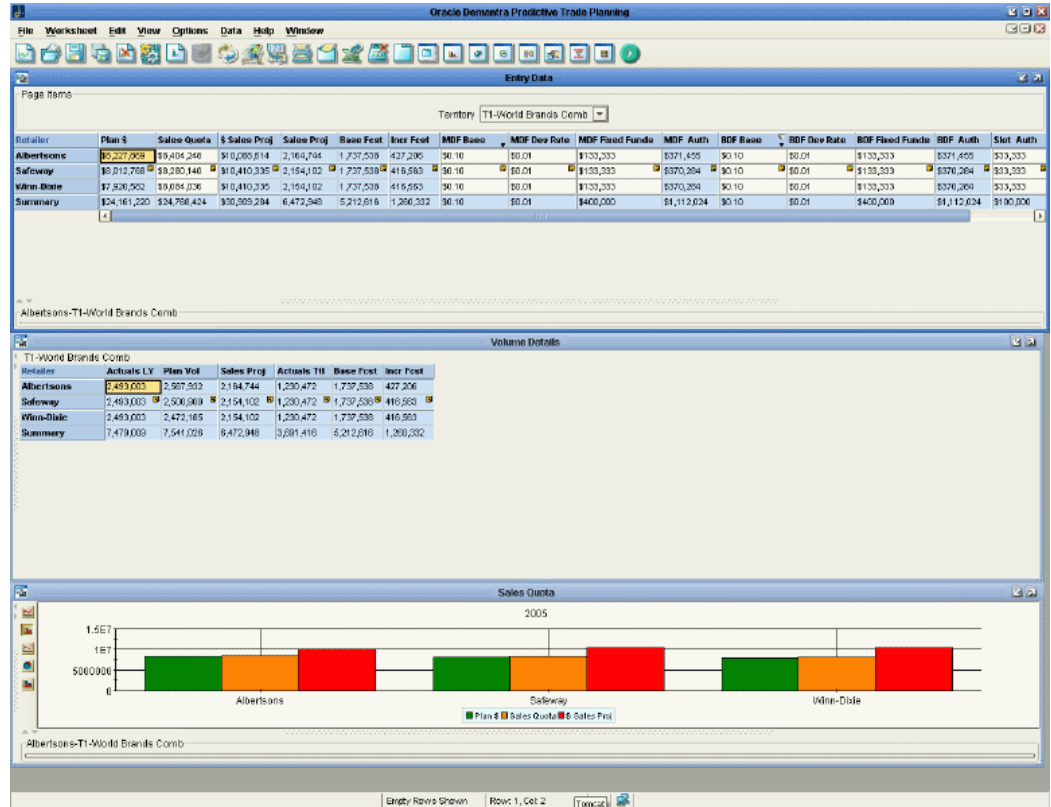
- Brand Development Funds (BDF): Base rate (BDF Base Rate), development rate (BDF Dev Rate), and fixed funds (BDF Fixed Funds). The total of BDF funds is shown as BDF Auth.
- Market Development Funds (MDF): Base rate (MDF Base Rate), development rate (MDF Dev Rate), and fixed funds (MDF Fixed Funds). 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:

$$(\text{BDF Base Rate} + \text{BDF Dev Rate}) * \text{volume} + \text{BDF Fixed Funds}$$

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.

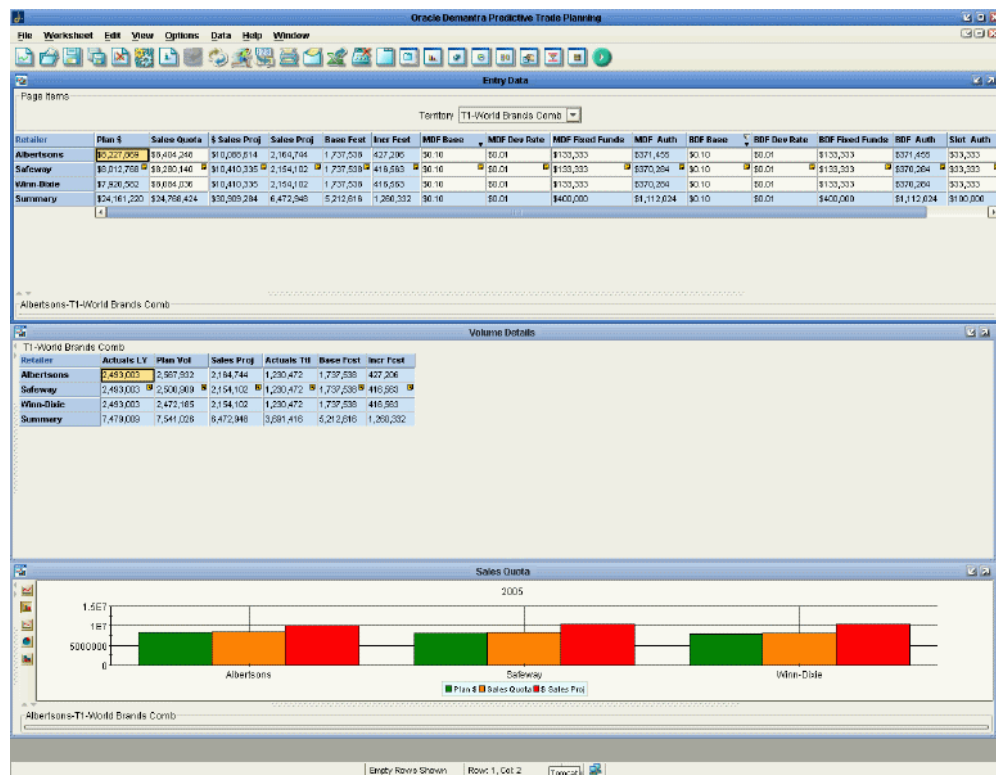
Unplanned promotions do not affect volume.

## 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.

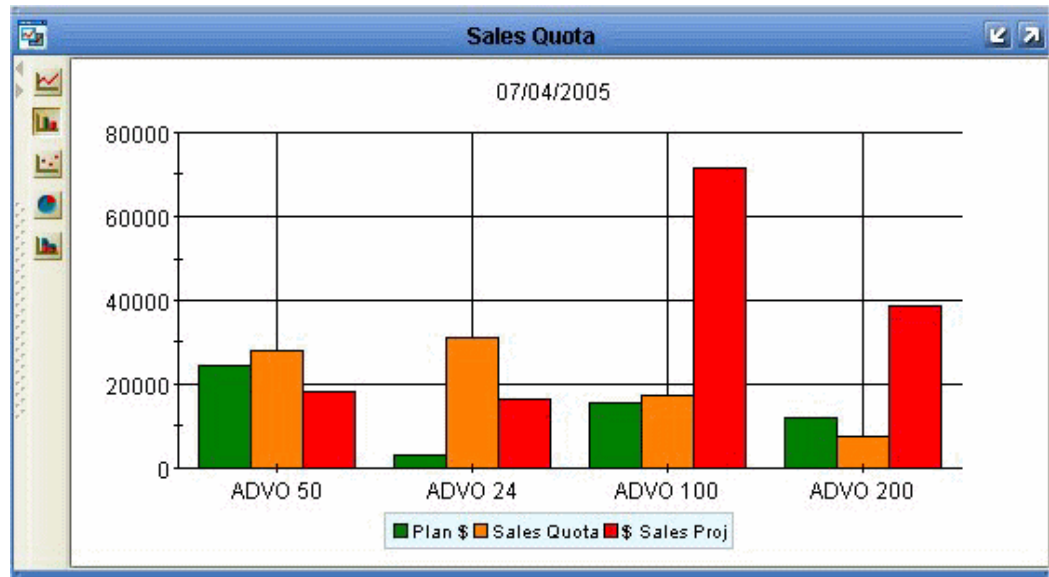
## Volume Details

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.)

### See also

"Working with Data"

## 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

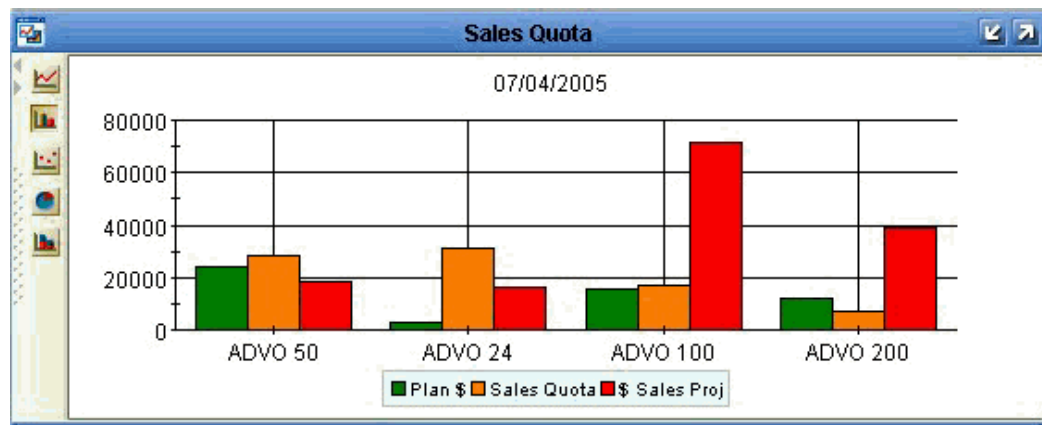
In the table, edit the quota and fund values as needed. You can select and edit multiple cells. See "Editing Data."

### 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.)

### See also

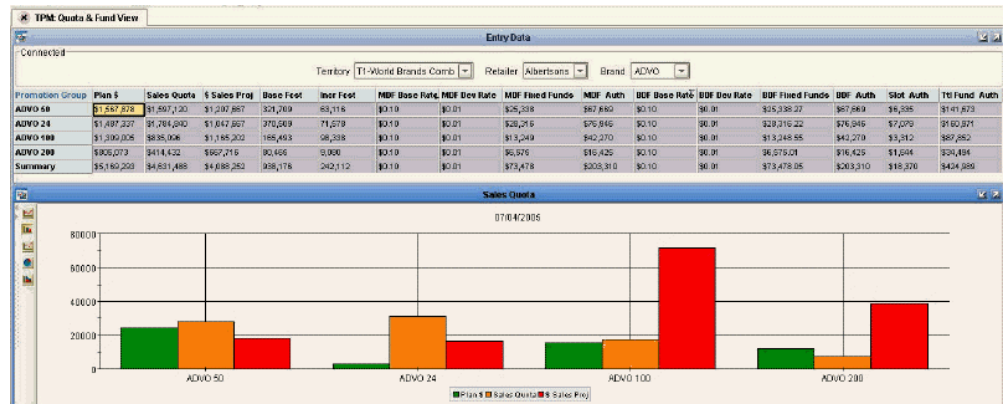
"Working with Data"

## 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	<ul style="list-style-type: none"><li>In My Worksheets (in Collaborator Workbench), click PTP: Quota and Fund Entry: Top-Down.</li><li>If a worksheet is currently open, click File &gt; Open. Click PTP: Quota and Fund Entry: Top-Down and then click Open.</li></ul>
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

<b>View</b>	<b>Series</b>	<b>Description</b>
	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
	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)

View	Series	Description
	\$ 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	<ul style="list-style-type: none"> <li>In My Worksheets (in Collaborator Workbench), click PTP: Quota and Fund Entry: Bottom-Up.</li> <li>If a worksheet is currently open, click File &gt; Open. Click PTP: Quota and Fund Entry: Bottom-Up and then click Open.</li> </ul>
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	<ul style="list-style-type: none"> <li>• In My Worksheets (in Collaborator Workbench), click PTP: Quota and Fund View.</li> <li>• If a worksheet is currently open, click File &gt; Open. Click PTP: Quota and Fund View and then click Open.</li> </ul>
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.



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## PTP: Tracking Volume

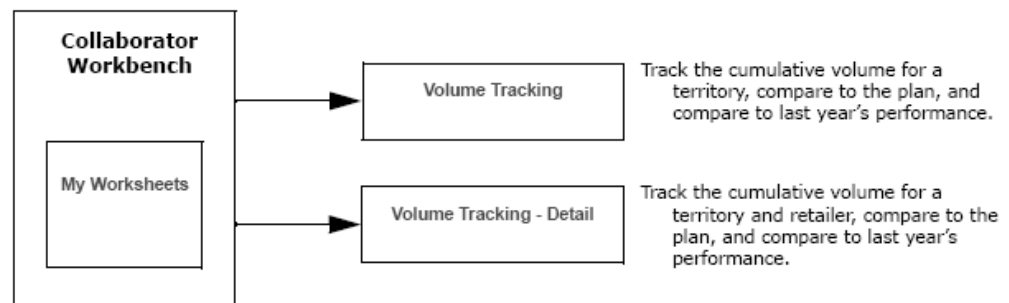
This chapter covers the following topics:

- 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:



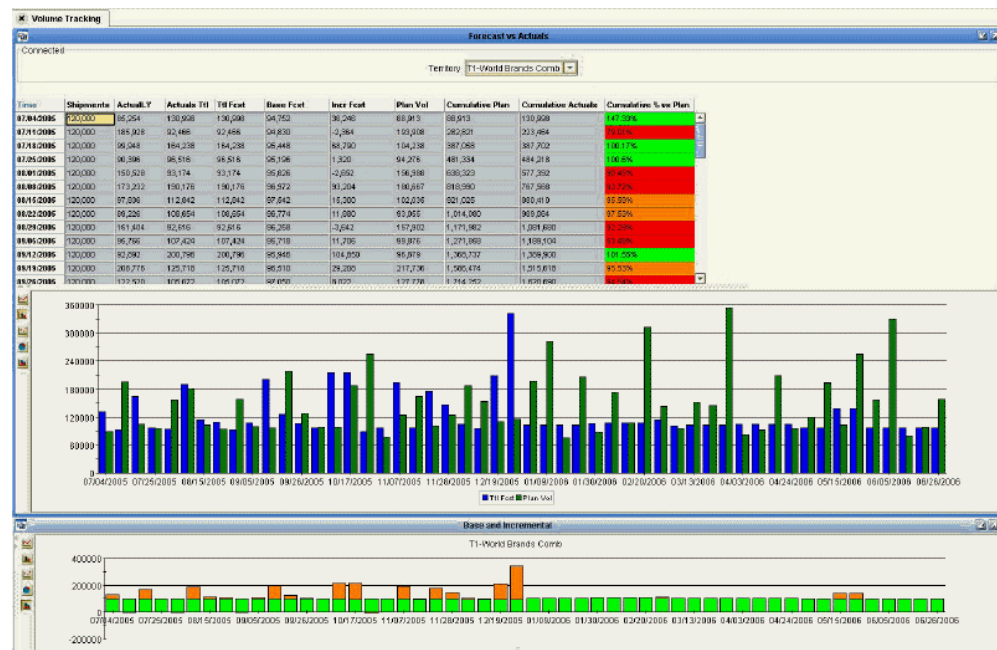
The Volume Tracking report is where product, territory, and account volumes are forecasted and monitored to ultimately feed volume requirements to operations. Fund planning already covered will be integrated with volume planning, because forecast volumes drive budgets in live accrual environments and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

The worksheet looks like this:



## Volume Tracking Table

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

Time	Shipments	Actual LY	Actuals Ttl	Ttl Fcst	Base Fcst	Incr Fcst	Plan Vol	Cumulative Plan	Cumulative Actuals	Cumulative % vs Plan
07/04/2005	120,000	85,254	130,898	130,898	84,752	36,245	86,813	86,813	130,898	147.33%
07/11/2005	120,000	185,928	92,468	92,468	94,830	-2,364	193,908	282,821	223,864	79.01%
07/18/2005	120,000	99,940	164,238	164,238	95,449	68,790	104,238	367,059	307,702	100.17%
07/25/2005	120,000	80,396	95,516	95,516	95,195	1,320	94,276	461,334	464,218	100.8%
08/01/2005	120,000	150,528	93,174	93,174	95,805	-2,652	156,988	638,323	577,392	90.45%
08/08/2005	120,000	173,232	130,176	130,176	96,372	33,204	160,687	816,930	767,568	93.72%
08/15/2005	120,000	97,636	112,842	112,842	97,542	15,300	102,035	921,025	880,410	95.59%
08/22/2005	120,000	89,226	108,854	108,854	96,774	11,880	93,055	1,014,080	989,064	97.53%
08/29/2005	120,000	151,404	92,616	92,616	96,259	-3,642	157,902	1,171,982	1,061,690	90.29%
09/05/2005	120,000	95,766	107,424	107,424	95,718	11,706	98,676	1,271,658	1,169,104	91.49%
09/12/2005	120,000	92,892	200,798	200,798	95,948	104,850	96,879	1,368,737	1,369,900	100.88%
09/19/2005	120,000	209,776	125,718	125,718	96,510	28,208	217,736	1,586,474	1,515,818	95.53%
09/26/2005	120,000	122,520	105,072	105,072	97,050	8,022	122,778	1,714,252	1,620,690	94.54%

This table tracks the following on a weekly basis:

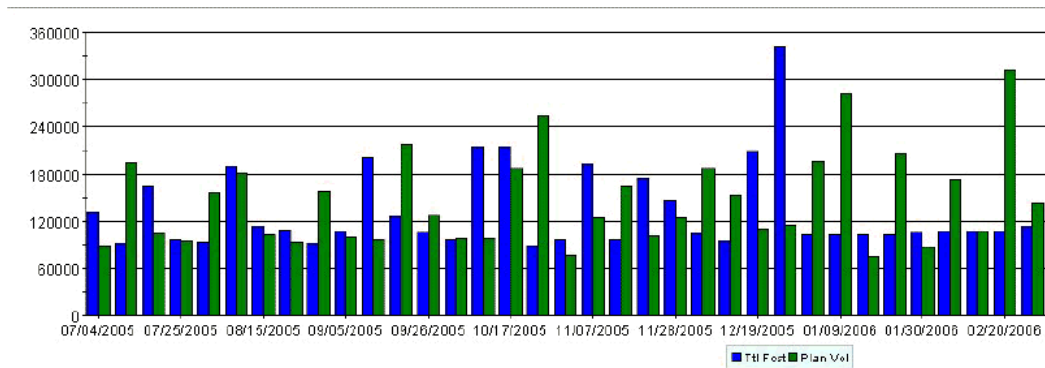
- Last year's shipments
- This year's shipments
- The current year's base volume projection
- The current year's incremental volume projection
- Cumulative % versus your plan

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

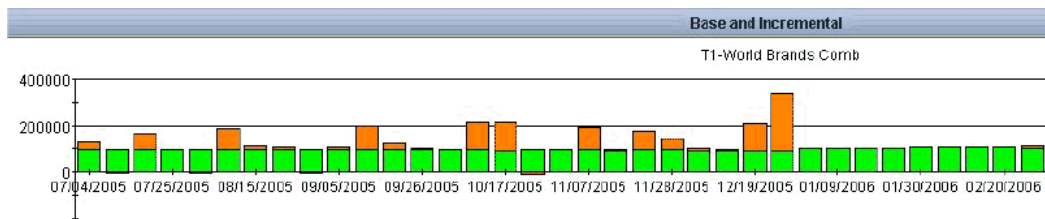
## Volume Tracking Graph

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

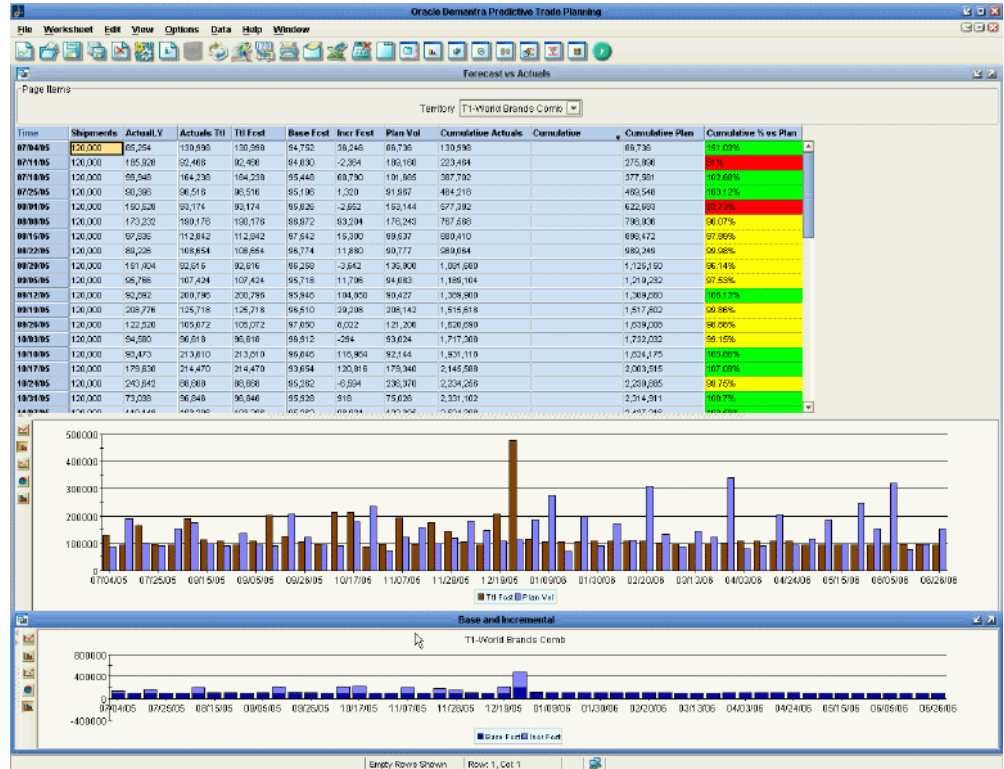
In this worksheet, depending on your authorization, you can do the following:

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.

The worksheet looks like this:



This worksheet shows the same data as the Volume Tracking worksheet; see "Tracking Volume for Territories".

## 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	<ul style="list-style-type: none"><li>• In My Worksheets (in Collaborator Workbench), click Volume Tracking - Detail.</li><li>• If a worksheet is currently open, click File &gt; Open. Click Volume Tracking - Detail and then click Open.</li></ul>
Levels you can select	Territory, Retailer
Levels used in cross tabulation	None
Time aggregation	Weekly

## Business Data

Same as in the Volume Tracking worksheet.



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## PMO: Planning Promotions

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
- Copying and Pasting a Promotion
- Deleting a Promotion
- Reference

### Introduction to the Planning Environment

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

See also

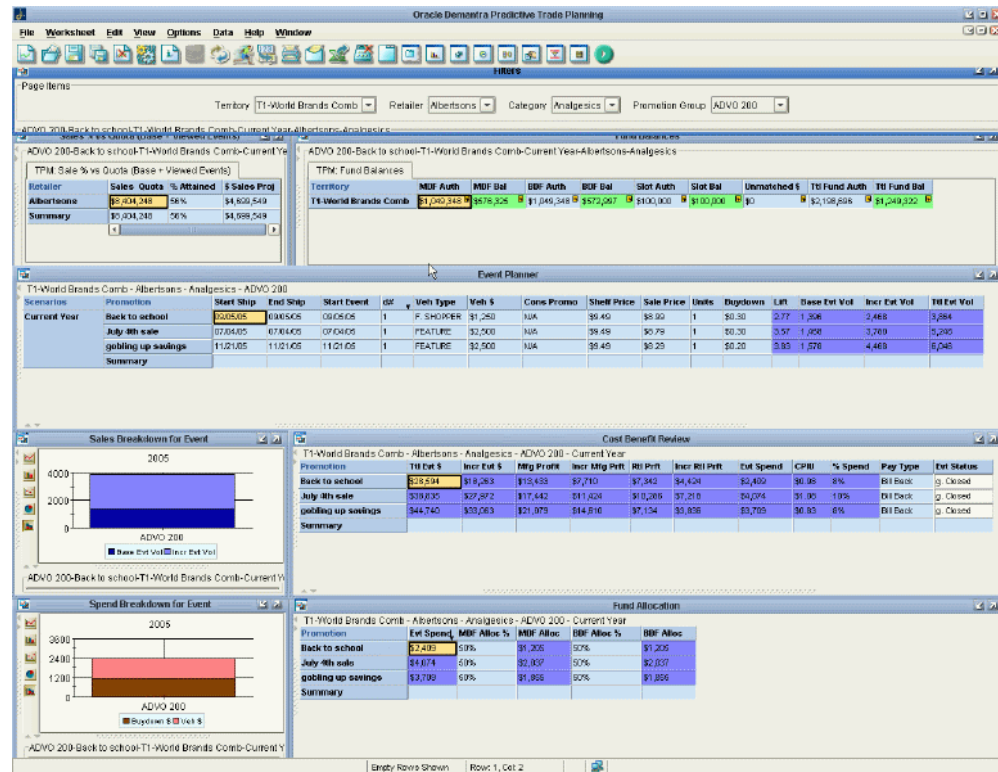
"Promotions"

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.

PTP displays the following screen:



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:

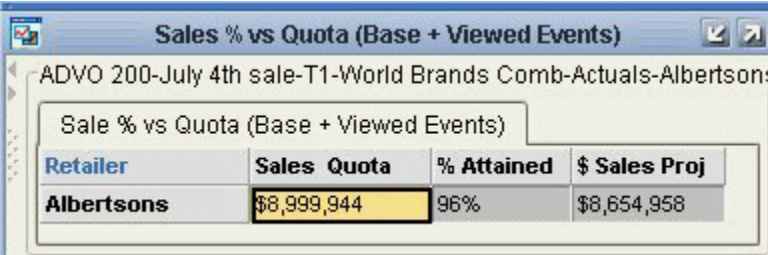
- White indicates editable fields.
- Gray indicates loaded data such as Start Ship and End Ship.
- Blue indicates data that is calculated by PTP, especially by the Analytical Engine.
- Red indicates negative profit numbers.

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.



Retailer	Sales Quota	% Attained	\$ Sales Proj
Albertsons	\$8,999,944	96%	\$8,654,958

## 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	# Veks	Veh Type	Veh \$	Cons Promo	Shelf Price	Sale Price	Units	Buydown	Lift
Actuals	July 4th sale	07/04/2005	07/04/2005	07/04/2005	1	FEATURE	\$2,500	N/A	\$3.48	\$8.79	1	\$0.30	3.57
Current Year	Back to school	08/05/2005	09/05/2005	09/05/2005	1	F. SHOPPER	\$1,250	N/A	\$3.48	\$8.99	1	\$0.30	2.77
	gobling up savings	11/21/2005	11/21/2005	11/21/2005	1	FEATURE	\$2,500	N/A	\$3.48	\$8.29	1	\$0.20	3.83
Summary	Summary												

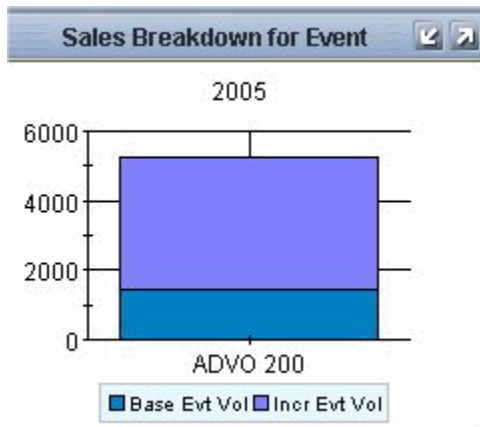
Notice that the events are grouped according to the associated scenario. As noted in "Promotions and Scenarios", the Sandbox scenario contains all the tentative events (unplanned events), and the Current Year scenario contains all the rest. The unplanned events have no impact on budget.

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.

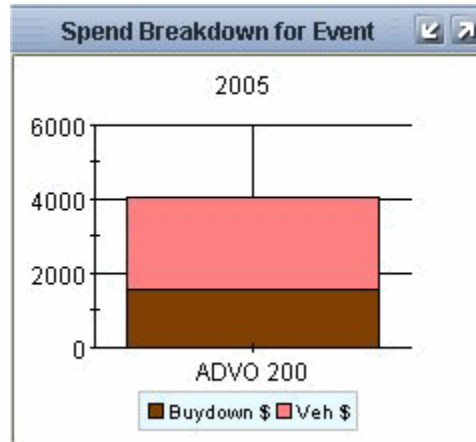
## Sales Breakdown for Event

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 - ADVQ 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	\$38,836	\$27,072	\$17,442	\$11,424	\$10,288	\$7,218	\$4,074	\$1.08	10%	Bill Back	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 - ADVQ 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".
- Delete promotions. See "Deleting a Promotion".
- Run simulations. See "Running a Simulation.. Note that this worksheet does not contain the data needed to find cannibalization.
- Run optimization. See "Optimizing a Promotion"..
- Right-click on a promotion and open other worksheets filtered to this promotion. For example, see "Examining Promotins from a Retailer's Point of View.
- Right-click on a scenario and open the PMO: Promotion Comparison worksheet filtered to that scenario. See "Comparing Promotions in a Scenario".

## 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.



**NEW Promotion : Late season markdown (Input)**

**Name** Late season markdown

**Population**

**Territory:** ABC CORP Salt Lake  
**Promotion Group:** EXCEDRA 24  
**Retailer:** Albertsons

**Edit**

**Dates:** Start: 11/11/2005 End: 11/28/2005

**Start Ship**

**End Ship**

**Scenarios** Current Year

**Vehicle Type** TPR

**Cons Promo** NONE

**Cancel** **Create**

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.
Vehicle Type	Choose a type of promotion that affects demand as closely as possible to the promotion you are creating.

---

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:
  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**

"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 Environment."
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**

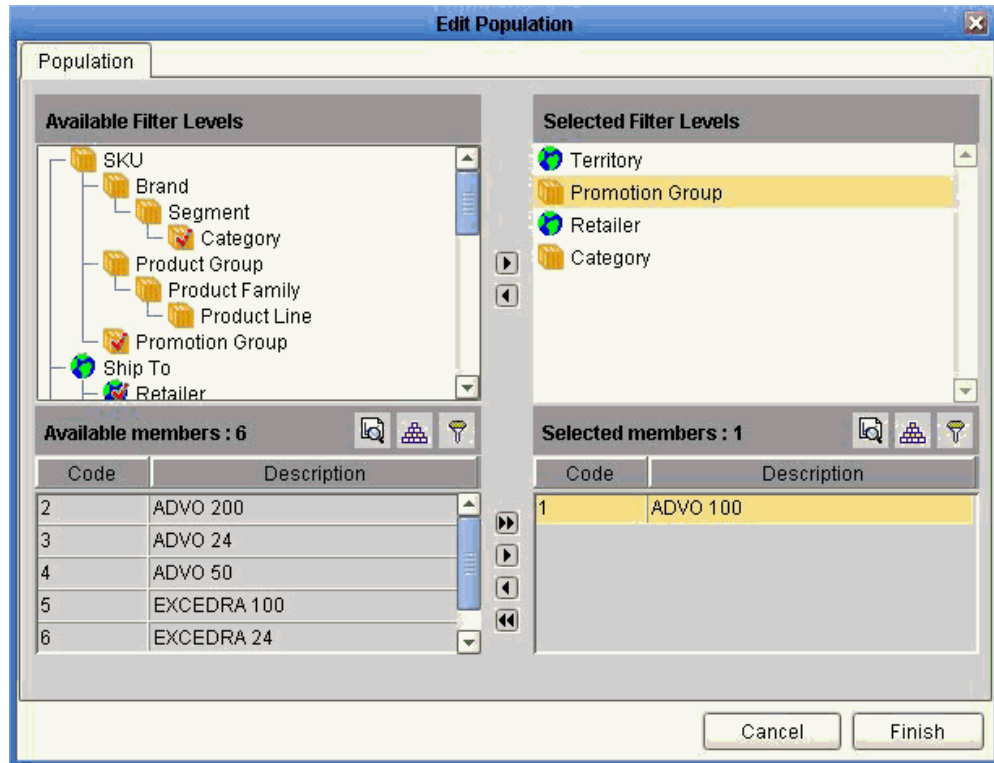
1. Right-click it and click Edit.
2. Type a new name and click OK.

### **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.

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

The following 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. Rerun the worksheet to see the changes.

## Copying and Pasting a 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	<ul style="list-style-type: none"><li>• In My Worksheets (in Collaborator Workbench), click Planning Environment.</li><li>• If a worksheet is currently open, click File &gt; Open. Click Planning Environment and then click Open.</li></ul>
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



<b>View</b>	<b>Series</b>	<b>Description</b>
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
	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

<b>View</b>	<b>Series</b>	<b>Description</b>
	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
	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

View	Series	Description
	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).
	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)

<b>View</b>	<b>Series</b>	<b>Description</b>
	BDF Alloc	Allocated brand development funds, based on the percentage set by the planner

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## 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:

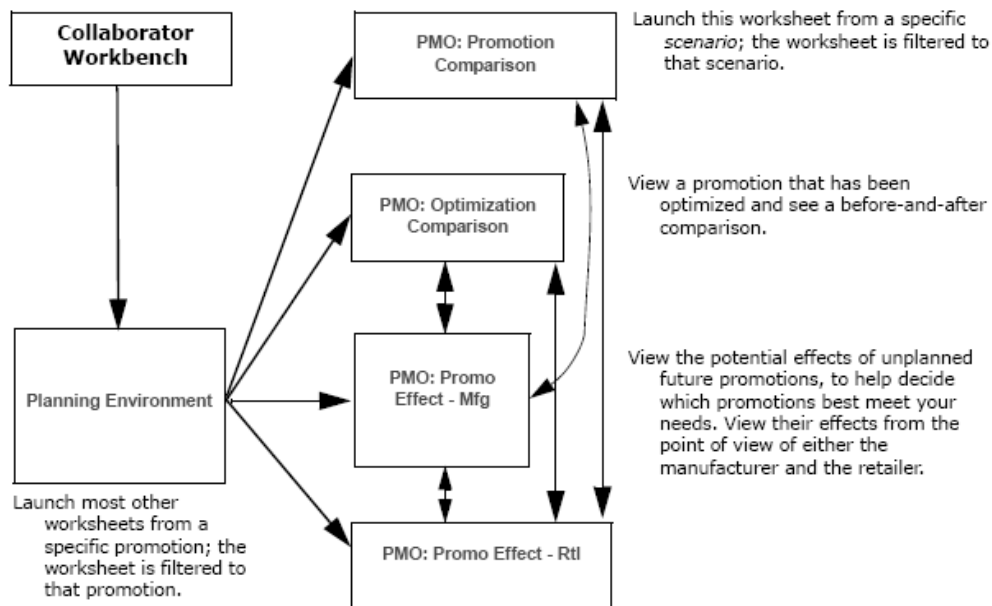
You may also want to examine the promotion in detail or create several tentative promotions (all in the Sandbox scenario) and view them side by side. See "PMO: Examining and Comparing Promotions."

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."

## 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.

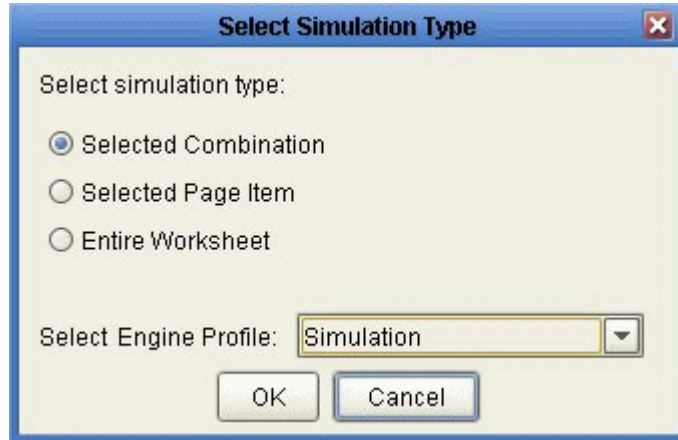
**Note:** The promotion must start in the future.

### To run a simulation

1. Make sure the Analytical Engine is running in simulation mode; see "Running the Analytical Engine in Simulation Mode".
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" or "Viewing Optimization Results".

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

PTP displays the following dialog box:

**Optimize Promotion : April End Special (Input)**

Name: April End Special

Population:

- Promotion Group: EXEDRA 100
- Territory: T1-World Brands Comb
- Retailer: Albertsons

View

Dates: Start: 04/24/2006 End: 04/30/2006

Optimization Goal: Maximize Revenue

Max Budget:

Optimization Range Start:

Optimization Range End:

Buydown Generation Method: Fixed Buydown

Max Buydown:

Min Rtl Margin Override:

Optimization Status: No Optimization Executed

☒ Save parameters Cancel Optimize

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.

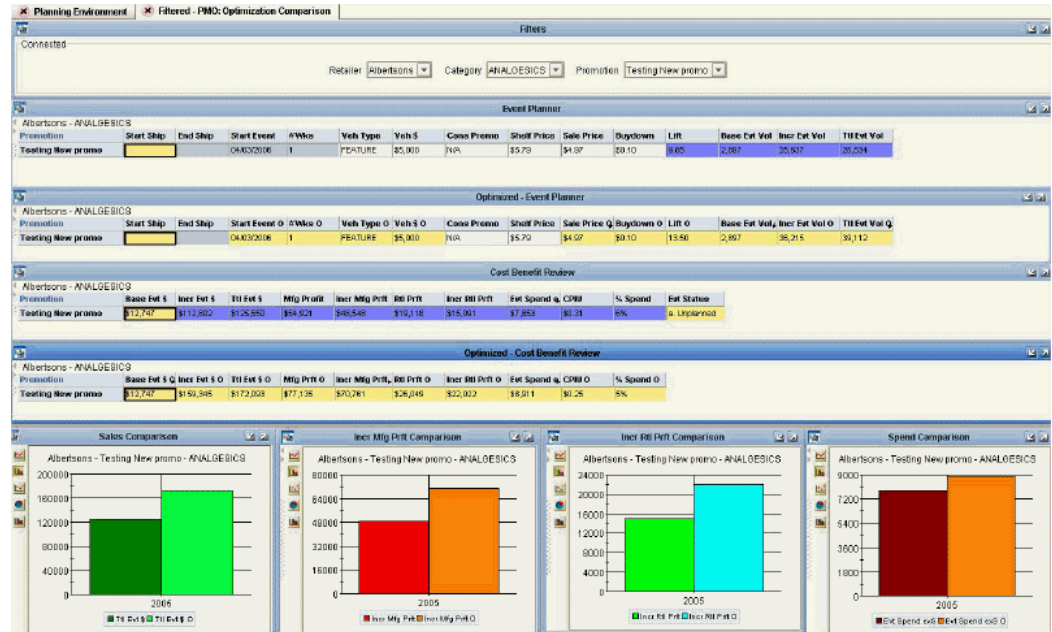
6. If you are not yet in the PMO: Optimization Comparison worksheet, right-click the promotion and open that worksheet. See "Viewing Optimization Results."

# 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 system displays the following:



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.

Event Planner														
Albertsons - ANALGESICS														
Promotion	Start Ship	End Ship	Start Event	#Vols	Veh Type	Veh \$	Cons Promo	Shelf Price	Sale Price	Buydown	Lift	Base Est Vol	Incr Est Vol	Ttl Est Vol
Testing New promo			04/03/2006	1	FEATURE	\$5,000	N/A	\$5.79	\$4.97	\$0.10	8.95	2,697	25,637	28,334

Optimized - Event Planner														
Albertsons - ANALGESICS														
Promotion	Start Ship	End Ship	Start Event	#Vols	Veh Type	Veh \$	Cons Promo	Shelf Price	Sale Price	Buydown	Lift	Base Est Vol	Incr Est Vol	Ttl Est Vol
Testing New promo			04/03/2006	1	FEATURE	\$5,000	N/A	\$5.79	\$4.97	\$0.10	13.56	2,697	38,215	40,912

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.

Cost Benefit Review											
Albertsons - ANALGESICS											
Promotion	Base Evt \$	Incr Evt \$	Ttl Evt \$	Mfg Profit	Incr Mfg Prft	Rtl Prft	Incr Rtl Prft	Evt Spend q	CPIU	% Spend	Evt Status
Testing New promo	\$12,747	\$112,302	\$125,050	\$54,921	\$48,548	\$19,113	\$16,091	\$7,353	\$0.31	5%	Unplanned

Optimized - Cost Benefit Review											
Albertsons - ANALGESICS											
Promotion	Base Evt \$	Incr Evt \$	Ttl Evt \$	Mfg Profit	Incr Mfg Prft	Rtl Prft	Incr Rtl Prft	Evt Spend q	CPIU	% Spend	Evt Status
Testing New promo	\$12,747	\$159,345	\$172,093	\$77,135	\$70,761	\$26,049	\$22,022	\$8,911	\$0.25	5%	

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".
- Run or rerun optimization. See "Optimizing a Promotion".
- 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".
3. Optionally right-click the promotion and launch either PMO: Promo Effect - Mfg or

PMO: Promo Effect - Rtl. See "PMO: Examining and Comparing Promotions".

## 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
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer

View	Series	Description
Optimized - Event Planner	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
	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
	Buydown O	Buydown allowance per unit, for optimized promotion
	Lift O	Lift factor for the optimized promotion

<b>View</b>	<b>Series</b>	<b>Description</b>
Cost Benefit Review	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
	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
Optimized - Cost Benefit Review	Evt Status	Current status of the promotion
	Base Evt \$ O	Base sales for manufacturer, for optimized promotion



View	Series	Description
	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
Incr Rtl Prft Comparison	Incr Rtl Prft	Incremental profit to the retailer due to the promotion

<b>View</b>	<b>Series</b>	<b>Description</b>
	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

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## PMO: Examining and Comparing Promotions

This chapter covers the following topics:

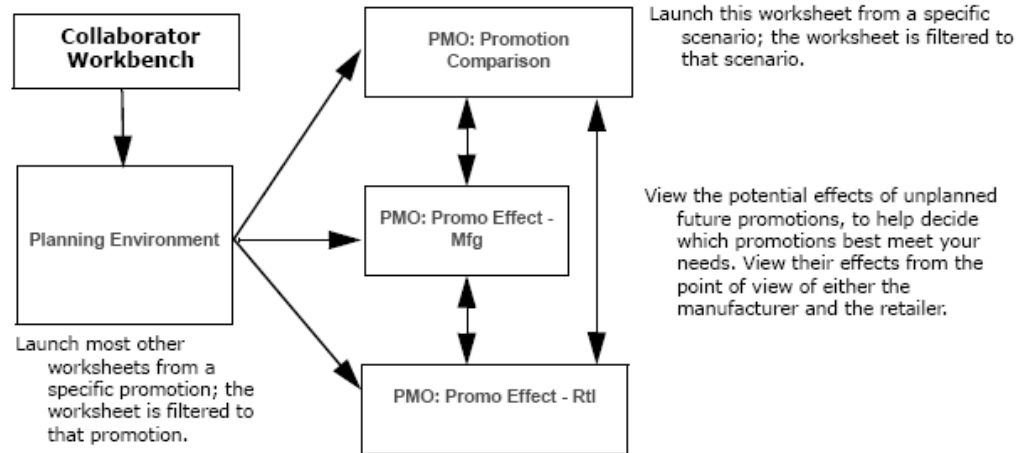
- Overview
- Examining Promotions from the Manufacturer's Point of View
- Examining Promotions from a Retailer's Point of View
- Comparing Promotions in a Scenario
- Reference

### 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.

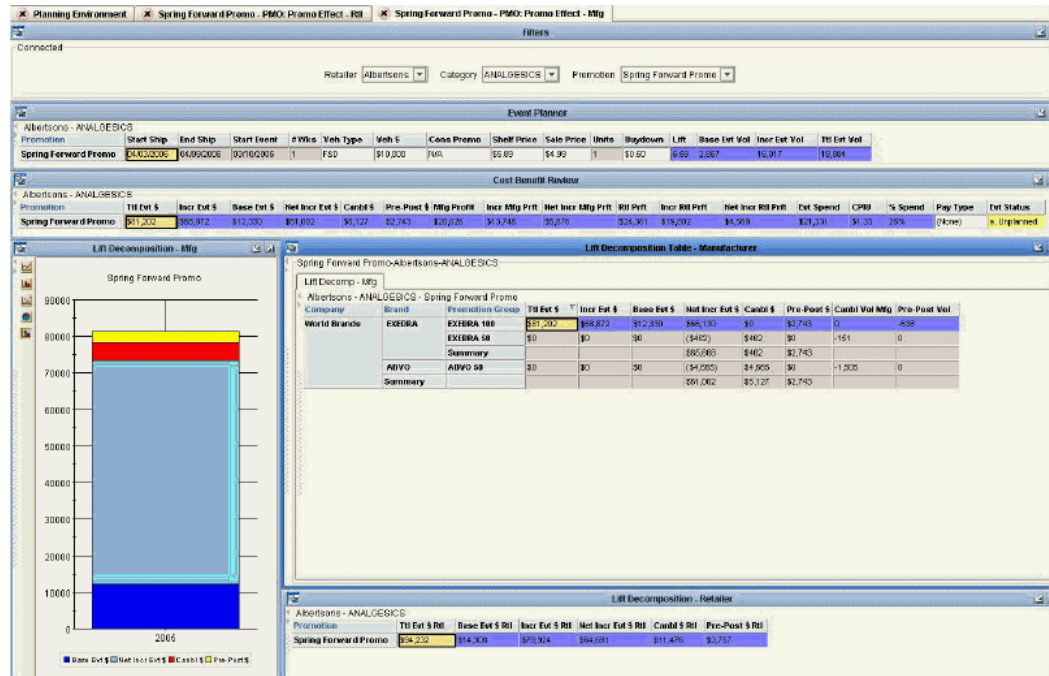
You may also want to run simulation, optimization, or both, as described in "PMO: Simulation and Optimization."

## 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."
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

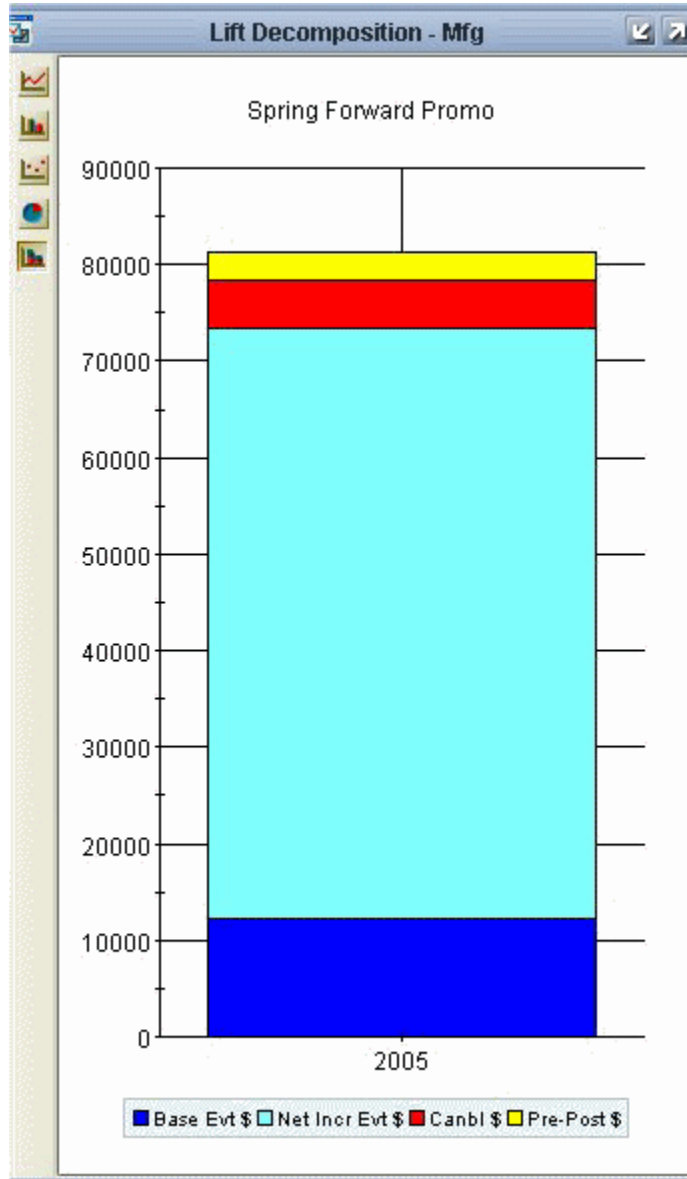
This window is the same as the Event Planner window in the Planning Environment worksheet. It displays details of all events, including start and end ship dates, vehicle type, vehicle cost, buydown, base volume and incremental volume.

## 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; see "Cannibalization" on page 19. 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 Evl \$	Incr Evl \$	Base Evl \$	Net Incr Evl \$	Cnbl \$	Pre-Post \$	Cnbl Vol Mfg	Pre-Post Vol	
World Brands	EXEDRA	EXEDRA 100	\$61,202	\$66,872	\$12,330	\$66,130	\$0	\$2,743	0	-630	
		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" 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."
- Run optimization. See "Optimizing a Promotion."
- 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."
- View aggregate information for the retailer at the bottom of the screen.

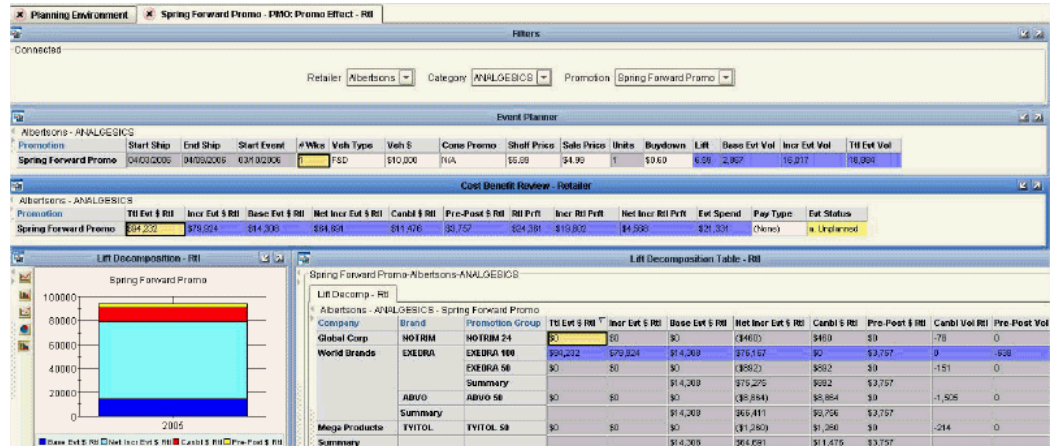
## Examining Promotions from a Retailer's Point of View

### 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										
Company	Brand	Promotion Group	TB Ext \$ Rtl	Incr Ext \$ Rtl	Base Ext \$ Rtl	Net Incr Ext \$ 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	\$76,157	\$0	\$3,757	0	-839
		EXEDRA 50	\$0	\$0	\$0	(\$892)	\$892	\$0	-151	0
		Summary			\$14,308	\$75,275	\$892	\$3,757		
	ADVO	ADVO 50	\$0	\$0	\$0	(\$6,864)	\$6,864	\$0	-1,505	0
Summary					\$14,308	\$66,411	\$9,756	\$3,757		
Mega Products	TYTOL	TYTOL 50	\$0	\$0	\$0	(\$1,260)	\$1,260	\$0	-214	0
Summary					\$14,308	\$64,591	\$11,475	\$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 "Optimizing 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

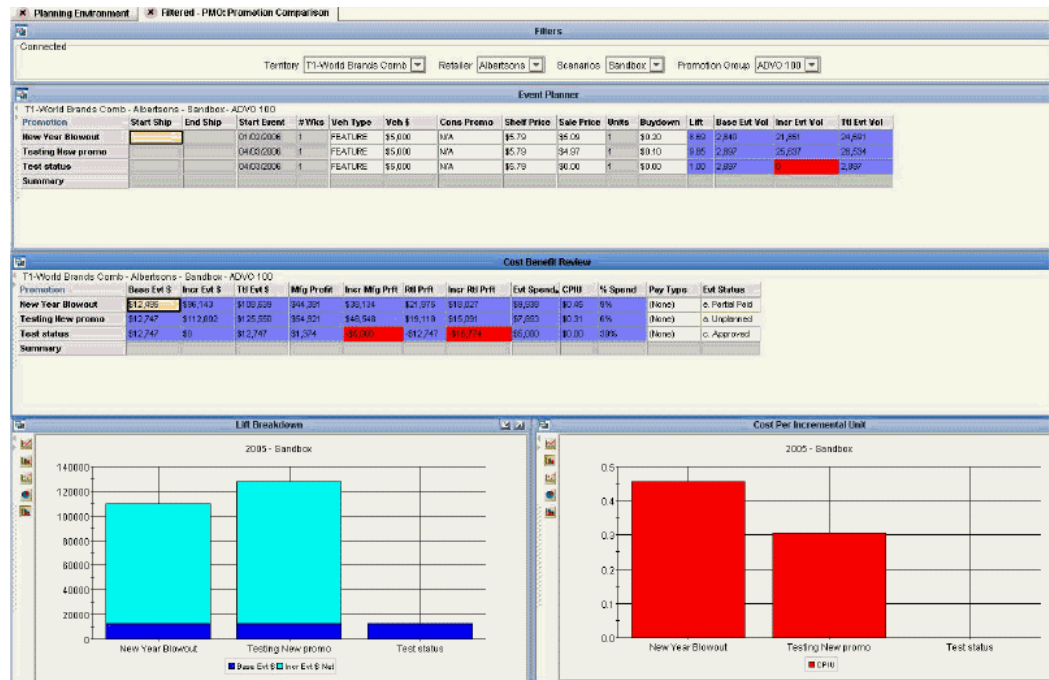
To determine how best to spend trade dollars, you can compare and evaluate multiple promotions in a scenario. Typically you create multiple unplanned promotions in the Sandbox scenario and then open the PMO: Promotion Comparison worksheet to view them side by side.

When you identify the best promotion, you can mark it as planned; see "Marking a Promotion as Planned."

### 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."
- Delete a promotion; see "Deleting a Promotion."
- Make a copy of a promotion; see "Copying and Pasting a Promotion."
- Run simulations. See "Running a Simulation."
- Run optimization. See "Optimizing a Promotion."
- 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."
- Change the status of a promotion, as described in "PMO: Planning Promotions."

## 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

<b>View</b>	<b>Series</b>	<b>Description</b>
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
Cost Benefit Review	Ttl Evt \$	Total sales during the promotion, for the manufacturer

<b>View</b>	<b>Series</b>	<b>Description</b>
	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
	CPIU	Event cost per incremental unit sold as a result of the promotion.

View	Series	Description
	% 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
	Pre-Post \$	Total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)

View	Series	Description
Lift Decomposition - Retailer	Canbl Vol Mfg	
	Pre-Post Vol	Total volume before and after the promotion, as a result of the promotion
	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
Cost Benefit Review - Retailer	Ttl Evt \$ Rtl	Total sales during the promotion, for the retailer

View	Series	Description
	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
	Canbl \$ Rtl	Cannibalization dollars for the retailer

View	Series	Description
Lift Decomposition Table - Retailer	Pre-Post \$ Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
	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
	Base Evt Vol	Base volume during the promotion

View	Series	Description
Cost Benefit Review	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt Vol	Total volume for the promotion
	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
Lift Breakdown	Evt Status	Current status of the promotion
	Base Evt \$	Base sales for the manufacturer, during the promotion

<b>View</b>	<b>Series</b>	<b>Description</b>
	Incr Evt \$ Net	
Cost Per Incremental Unit	CPIU	Event cost per incremental unit sold as a result of the promotion.

---

## PMO: Reviewing Past Performance

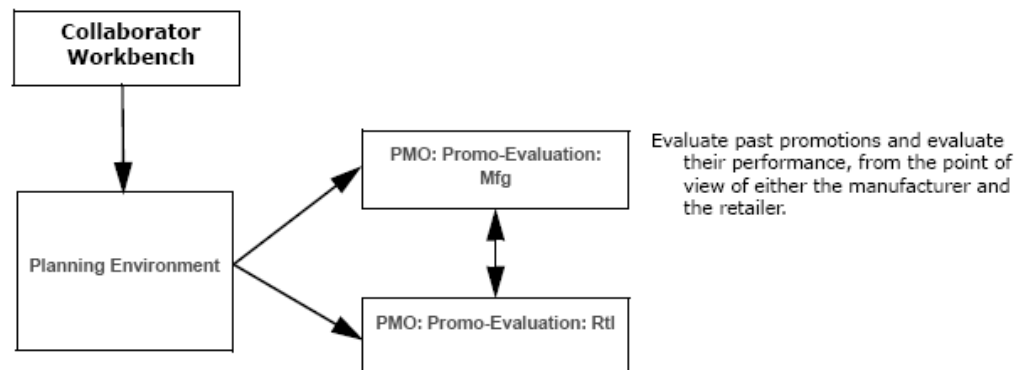
This chapter covers the following topics:

- 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:

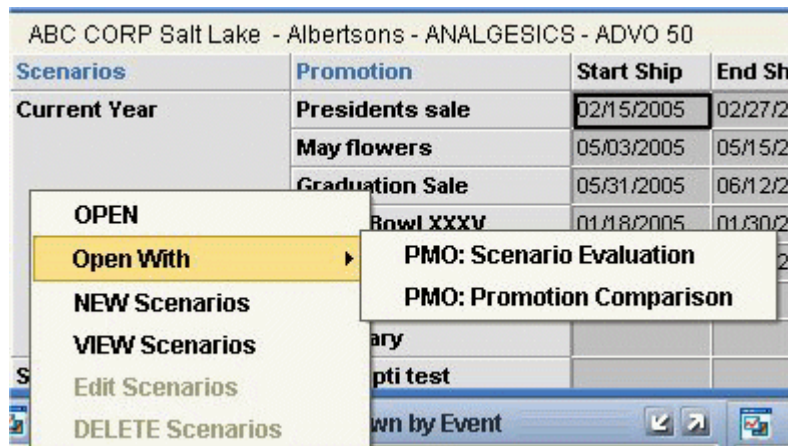
- Cannibalization
- Pre and post effects, such as pantry loading

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

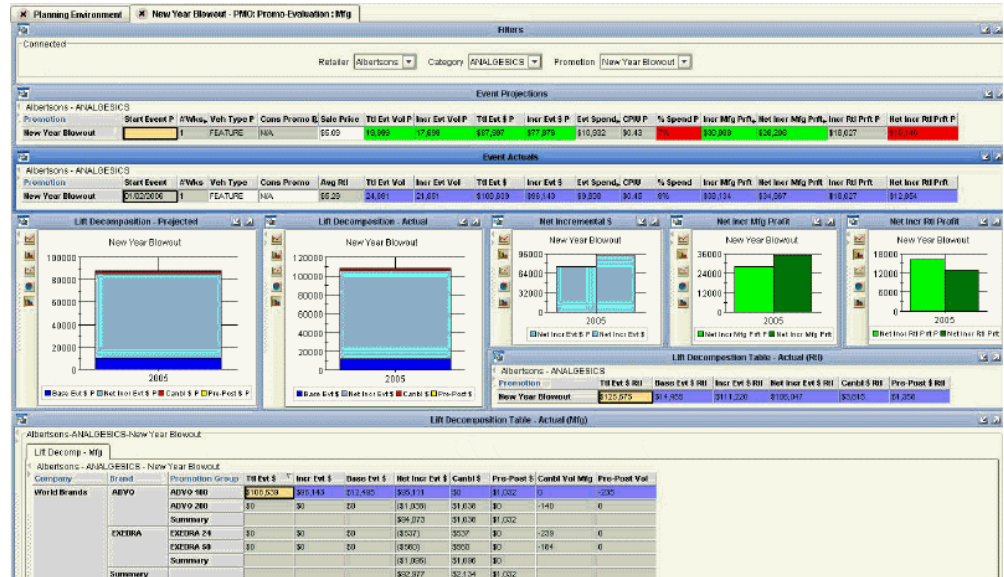
1. You typically start in the Planning Environment; see "Introduction to the Planning Environment."
2. In the Event Planner window, right-click a promotion and click Open With > PMO: Promo-Evaluation: Mfg.



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:

Event Projections														
Albersons - ANALOGICS														
Promotion	Start Event	Weeks	Vehicle Type	Cons Promo	Avg Rtl	TD Est Vol	Iner Est Vol	TD Est \$	Iner Est \$	Est Spend	CPM	% Spend	Iner Mfg Pft	Net Iner Mfg Pft
New Year Blowout	1/1/2006	1	FEATURE	N/A	\$5.00	15,000	17,000	\$75,000	\$85,000	\$10,000	\$0.43	2%	\$10,000	\$10,000

Event Actuals														
Albersons - ANALOGICS														
Promotion	Start Event	Weeks	Vehicle Type	Cons Promo	Avg Rtl	TD Est Vol	Iner Est Vol	TD Est \$	Iner Est \$	Est Spend	CPM	% Spend	Iner Mfg Pft	Net Iner Mfg Pft
New Year Blowout	1/1/2006	1	FEATURE	N/A	\$5.20	24,000	21,000	\$100,000	\$85,000	\$9,000	\$0.45	6%	\$20,000	\$16,000

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:

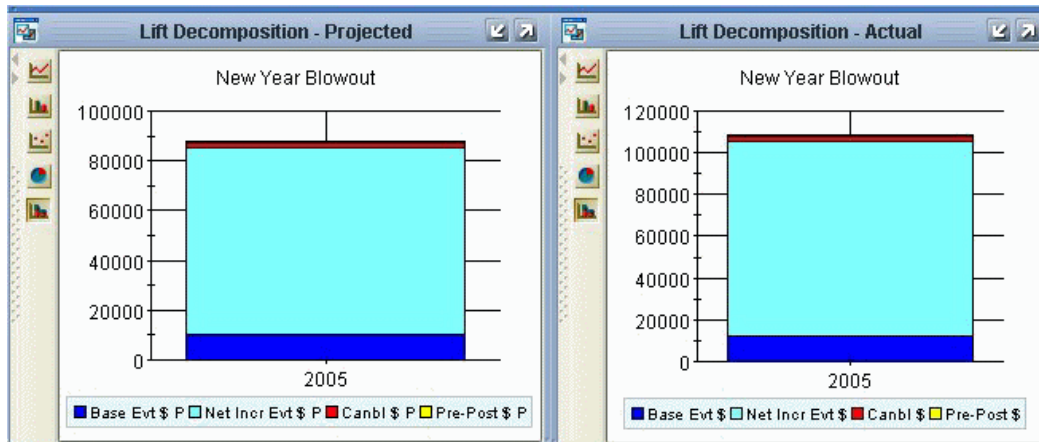
- If the actual value is more than 20% different from the projection in the undesirable sense, the projection is shown in red.
- If the actual value is more than 20% different from the projection in the desirable sense, the projection is shown in green. For example, if the actual profit was 130% of the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

The Event Actuals window shows the corresponding actuals.

## Lift Decomposition Graphs

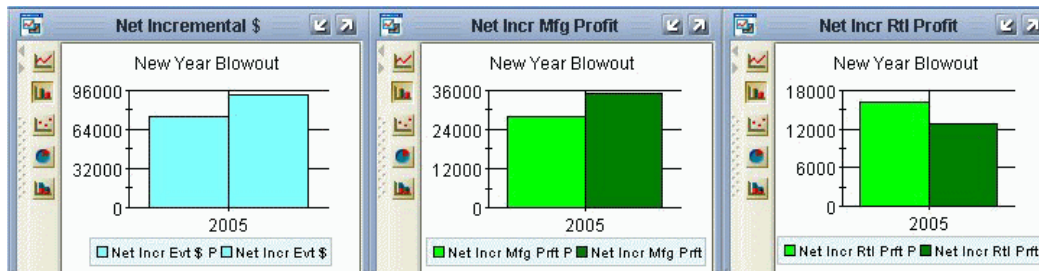
This worksheet also displays lift decomposition graphs showing the projected

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	\$36,143	\$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	-104	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:

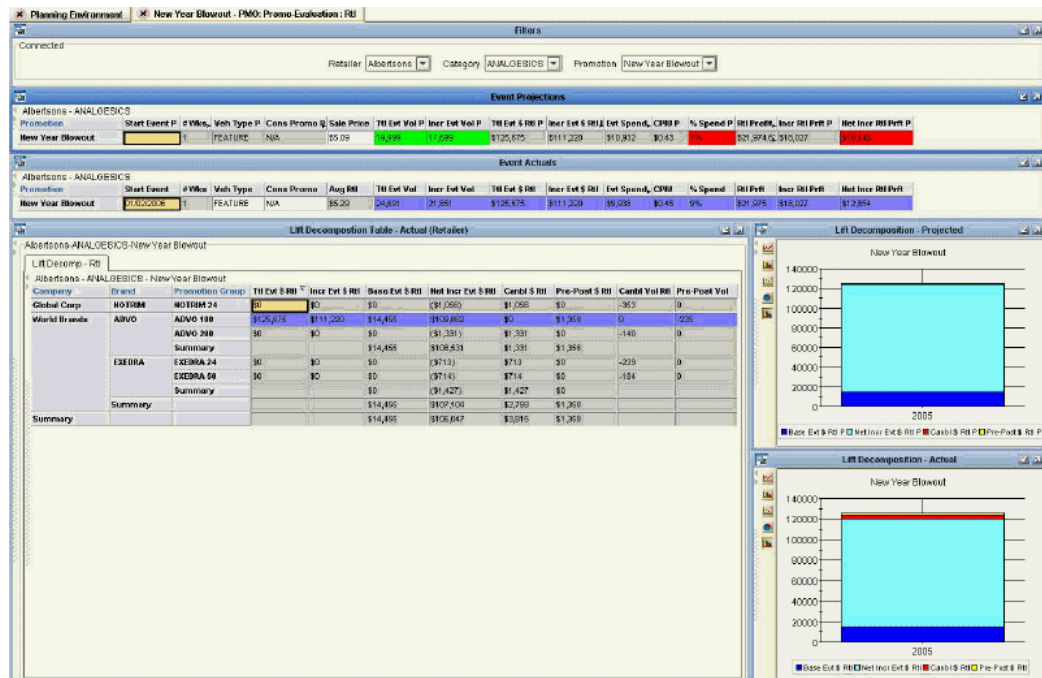
Right-click a promotion and open another worksheet filtered to that promotion. For example, you can open the PMO: Promo-Evaluation: Rtl worksheet to see past performance from the retailer's perspective. See "Evaluating Performance from a Retailer's Point of View."

## 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."
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:

Event Projections															
Albertsons - ANALGESICS		Promotion	Start Event P	#Vols_Veh Type P	Cons Promo	Sale Price	Ttl Est Vol P	Incr Est Vol P	Ttl Est \$ Rtl P	Incr Est \$ Rtl P	Est Spend, CPM P	% Spend P	Rtl Profit_Incr Rtl P	Net Incr Rtl P	
New Year Blowout			1	FEATURE	N/A	\$5.00	19,000	17,686	\$125,675	\$111,220	\$10,832	\$0.43	2%	\$21,874.62 \$18,027	\$15,148

Event Actuals																
Albertsons - ANALGESICS		Promotion	Start Event	#Vols_Veh Type	Cons Promo	Aug Rtl	Ttl Est Vol	Incr Est Vol	Ttl Est \$ Rtl	Incr Est \$ Rtl	Est Spend, CPM	% Spend	Rtl Profit_Incr Rtl P	Net Incr Rtl P		
New Year Blowout			6/12/2008	1	FEATURE	N/A	35.20	24,801	21,881	\$125,675	\$111,220	\$9,088	\$0.45	9%	\$21,875 \$18,027	\$12,854

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 Decomposition Table - Actual (Retailer)										
Albertsons-ANALGESICS-New Year Blowout										
Lift Decomposition - RTI										
Albertsons - ANALGESICS - New Year Blowout										
Company	Brand	Promotion Group	Ttl Eff \$ RTI	Incr Eff \$ RTI	Base Eff \$ RTI	Net Incr Eff \$ RTI	Canbi \$ RTI	Pre-Post \$ RTI	Canbi Vol RTI	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		

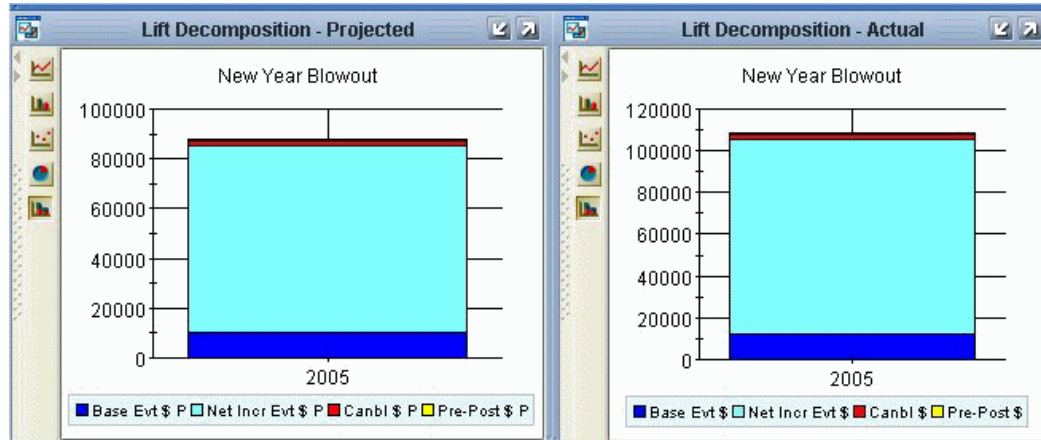
Here you can see these useful summaries:

- 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."

## 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:

Promotion Type	Avg Rtl	Avg % Disc	Avg B Desc	Avg Ttl Evt Vol	Avg Incr Evt Vol	Avg Lift	Avg Ttl Evt \$	Avg Incr Evt \$	Avg Mfg Pct	Avg Incr Mfg Pct	Avg Rtl Pct	Avg Incr Rtl Pct	Avg Rtl Margin	Avg Evt Special	Avg CPB	Avg % Special
FEATURE	\$4.88	12%	\$0.25	21,858	17,713	5.25	\$82,713	\$54,580	\$27,475	\$20,747	\$15,086	\$11,265	24%	\$7,303	\$3.54	11%
F. SHOPPER	\$5.37	11%	\$0.26	11,131	6,576	2.35	\$35,558	\$20,328	\$13,827	\$6,097	\$7,351	\$2,012	25%	\$3,605	\$3.63	11%
F&B	\$3.54	17%	\$0.37	41,229	35,449	9.53	\$125,744	\$110,860	\$40,416	\$40,632	\$24,055	\$19,585	23%	\$17,330	\$3.58	10%
DISPLAY	\$3.35	14%	\$0.25	19,370	15,130	3.10	\$59,078	\$40,046	\$25,083	\$15,047	\$10,853	\$5,412	20%	\$6,092	\$3.46	10%
TPR	\$4.25	9%	\$0.17	24,182	16,134	4.27	\$67,720	\$52,223	\$26,425	\$20,822	\$24,610	\$20,018	38%	\$4,660	\$3.27	7%
Summary	\$4.48	9%	\$0.25	22,178	17,504	4.95	\$69,380	\$54,724	\$27,088	\$20,556	\$17,300	\$12,926	28%	\$7,248	\$3.54	10%

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
Event Projections	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
Lift Decomposition - Actual	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)
	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
Net Incremental \$	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 Decomposition 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
	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.
Event Actuals	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
Lift Decomposition Table - Actual (Retailer)	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
	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	<p>In My Worksheets (in Collaborator Workbench), click PMO: Promotion History.</p> <p>If a worksheet is currently open, click File &gt; Open. Click PMO: Promotion History and then click Open.</p>
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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

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## Advanced Topics and Reference



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## 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"
Series	Select series to include.	"Selecting Series on a Worksheet"
Time	Specify time resolution of worksheet or content pane and span of time to consider.	"Specifying the Time Resolution and Time Span"
Aggregation Levels	Optionally specify aggregation levels to include.	"Specifying Aggregation Levels"
Filters	Optionally filter the selected combinations.	"Filtering the Worksheet or Content Pane"
Exceptions	Optionally apply exception filters to further filter the combinations.	"Applying Exception Filters"
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"

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:

000. Introduction

Description:

Access

☐ Private

☒ Public

☐ Enable extra filters

☐ Cache Worksheet Data

Refresh Type

Manual

Open With Context

Selected Member

Content Definition

☐ Content

Top/Bottom Filter

Display Format:

Line Graph

Top

10

Location:

Wide Pane

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.



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Enable Extra Filters	<p>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.</p> <p>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.</p> <p>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.</p> <p>This option has no effect on content panes.</p>
Cache Worksheet Data	<p>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:</p> <ul style="list-style-type: none"> <li>• Manual—users will have to manually refresh the cache. See "To refresh your local worksheet cache".</li> <li>• Automatic—Demantra will automatically refresh the cache, as specified by your implementors.</li> </ul> <p>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.</p>
Open With Context	<p>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).</p> <p>Choose one of the following options:</p> <ul style="list-style-type: none"> <li>• Selected Member (this will filter the worksheet to the object from which it was launched, aggregating across all combinations associated with that object)</li> <li>• Selected Combination (this will filter the worksheet to the combination from which it was launched)</li> </ul>

---

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	<p>Specifies the display format to use. Not all display formats may be possible, depending on the number of levels and series you include.</p> <p>Currently, Collaborator Workbench chooses the color to use for each series, when displaying series in the graph-type content panes.</p>
Location	<p>Select Wide Pane or Narrow Pane to determine where the content pane will be displayed in Collaborator Workbench.</p>
Top/Bottom Filter	<p>(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).</p> <ul style="list-style-type: none"> <li>• Use the dropdown menu to specify whether the filter should apply to the top-ranked or to bottom-ranked members.</li> <li>• In the input field, specify the number of members to be included.</li> <li>• 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.)</li> </ul> <p><b>Note:</b> 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.</p> <p>This option does not affect the worksheet.</p>

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3. For worksheets only, to specify how the table should appear, see "Defining the View Layout".

## Selecting Series on a Worksheet

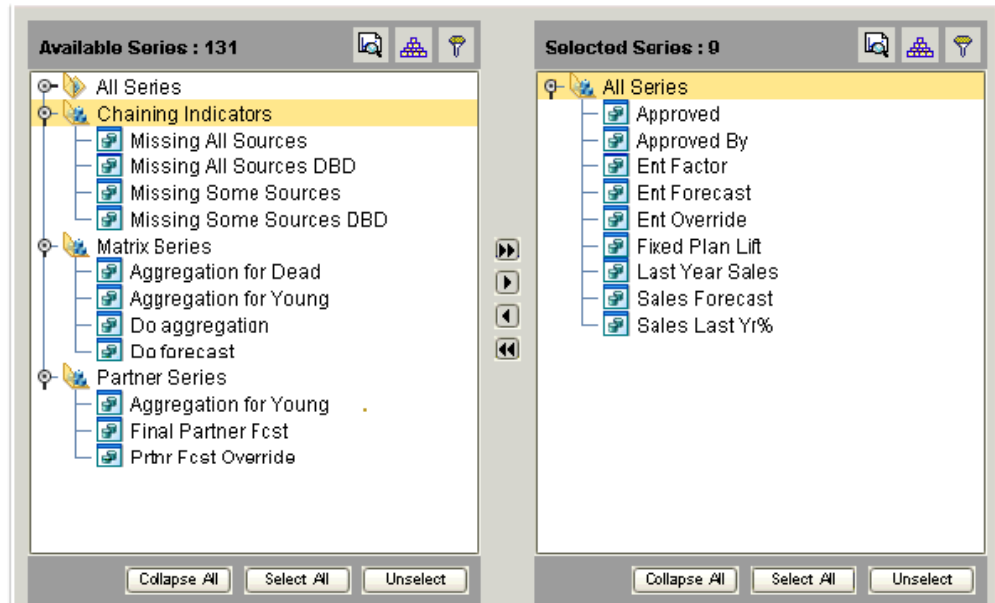
Every worksheet or content pane must include at least one series.

**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".

See "Series (Measures)"

## 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.

The screenshot shows a 'Time' dialog box with two main sections: 'Time Scaling' and 'Time Filtering'. In the 'Time Scaling' section, the 'Time Scale' is set to 'Quarter'. The 'Time Filtering' section is titled 'Scaled by periods of a Quarter from today'. It contains three radio buttons: 'Fixed' (selected), 'Relative to Today', and 'Relative to Last Sales Date'. Below these are two rows of date and count inputs. The 'From Date' row shows '03/10/2003' and a count of '0'. The 'To Date' row shows '03/06/2006' and a count of '12'. An 'Advanced...' button is located at the bottom right of the dialog.

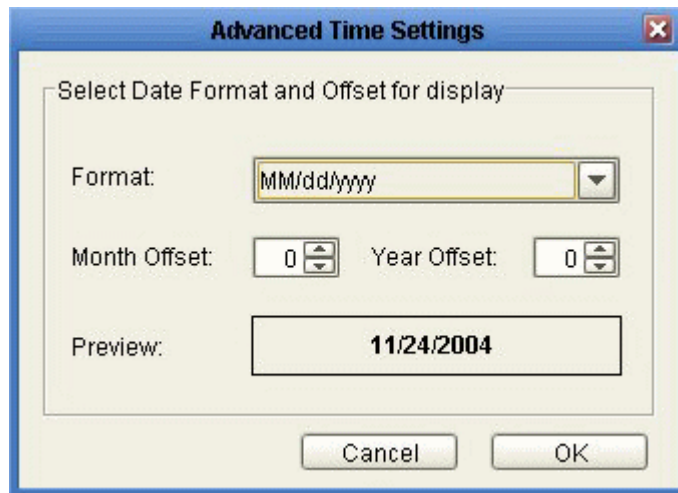
### To specify time criteria:

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.
	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 suppose 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; see "To specify which levels to use in a worksheet view."

The layout of the worksheet view controls the order in which the levels are used; see "Defining the View Layout."

See also

"Using the Advanced Selection Options"

"Levels (Segmentation)"

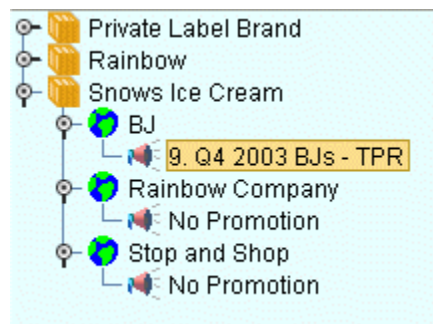
"Changing the Overall Scale or Unit of Measure"

## 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

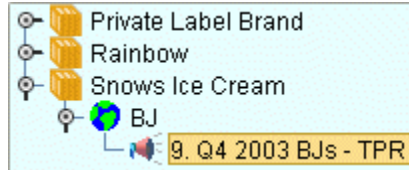
The worksheet or content pane displays placeholders for combinations that do not have promotions. For example:





For a worksheet, if you move the promotion level to the worksheet axis (see "Defining the View Layout"), the table will display a similar placeholder.

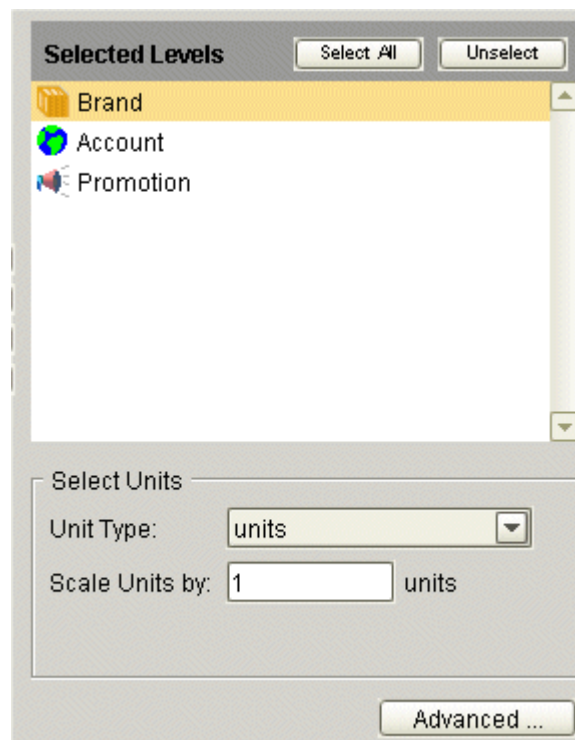
You can exclude some of these combinations. For example, you might want a worksheet to include only the combinations that have both sales and promotions, as follows:



### To exclude combinations with partial data:

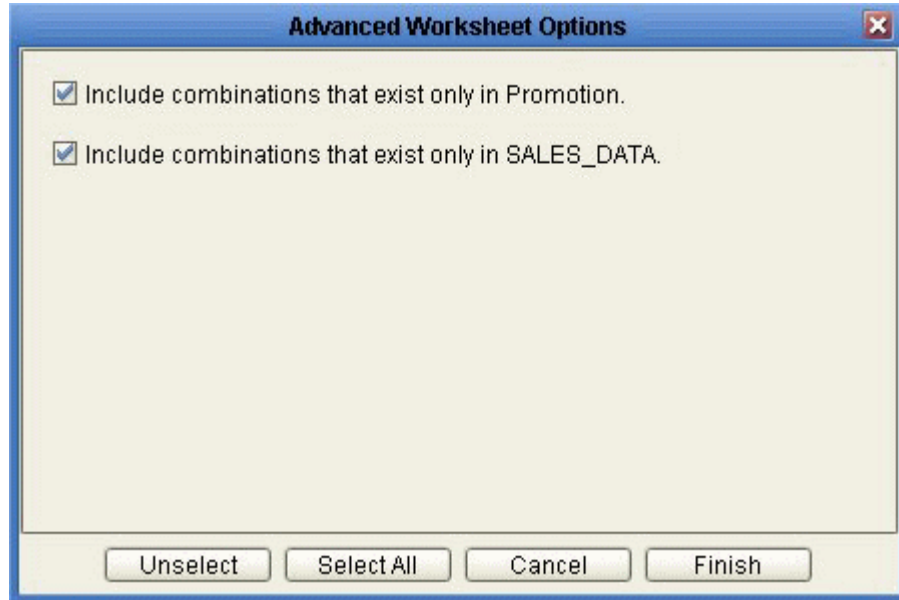
1. Click Worksheet > Aggregation Levels. Or click the Levels button.
2. Include at least two levels, one of which should be a promotional level.

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 also

"Specifying Aggregation Levels"

## 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.

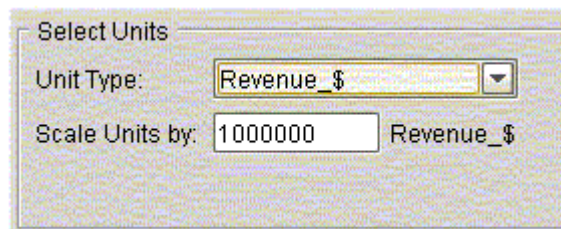
You can change either or both of these. When you make this change, the displayed values for most or all of the series in the worksheet or content pane are changed.

**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.

The image shows a dialog box titled "Select Units". It contains two main sections. The first section is labeled "Unit Type:" and has a dropdown menu currently showing "Revenue\_ \$". The second section is labeled "Scale Units by:" and has a text input field containing the number "1000000". To the right of this input field, the unit "Revenue\_ \$" is displayed.

2. In the Scale Units by box, specify the factor by which all numbers are to be divided (for display purposes).

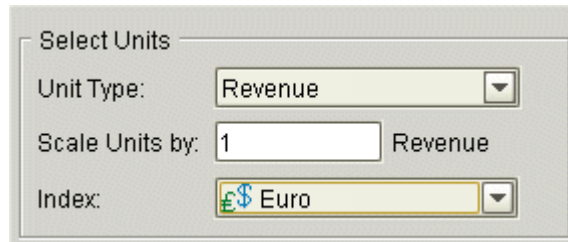
For example, if you specify a factor of 1000, the displayed data will be divided by 1000. So the number 96,000 will be displayed as 96. The vertical axis of the graph is updated to show the factor in parentheses. For example, if the vertical axis was formerly labeled "units", it will be updated to say "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 also

"Specifying Aggregation Levels"

## 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.

Available Members		Selected Members	
Code	Description	Code	Description
Default	Default Brand	11	Rainbow
12	Private Label		
99	Demand Profiles		
VHS	Snows Ice Cream		

level members not included in the filter

level members included in the filter

(and therefore displayed in the worksheet)

**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.

Also see "Applying Exception Filters."

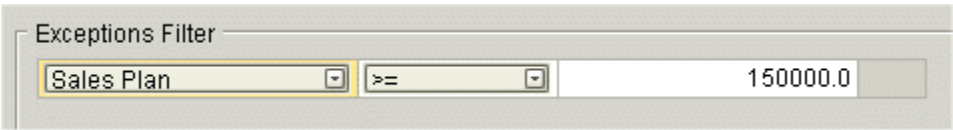
# Managing the List of Members

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."

## 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:

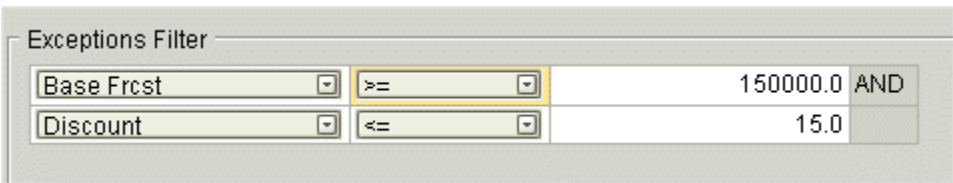


When you open the worksheet, Demantra checks each combination in the worksheet. For each combination, if the condition is met for any time in the worksheet date range, Demantra displays that combination. For example, the worksheet shows combinations that have Sales Plan values greater than or equal to 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.

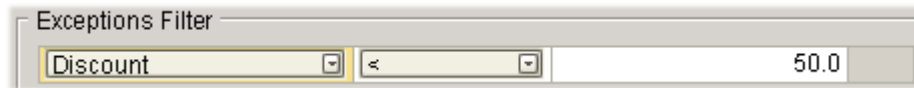
2. Click Add.

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.

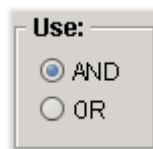
4. In the second box, select an operator from the dropdown list.

5. In the third box, type or choose a value.



The screenshot shows a window titled "Exceptions Filter". Inside, there is a table-like structure with three columns. The first column contains a dropdown menu with "Discount" selected. The second column contains a dropdown menu with "<" selected. The third column contains a text input field with "50.0" entered.

- 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.



The screenshot shows a section labeled "Use:". Below the label are two radio buttons. The first radio button is labeled "AND" and is selected. The second radio button is labeled "OR" and is not selected.

### To delete an exception filter:

1. Click the exception and then click Delete.

See also

"Filtering the Worksheet or Content Pane"

"Series (Measures)"

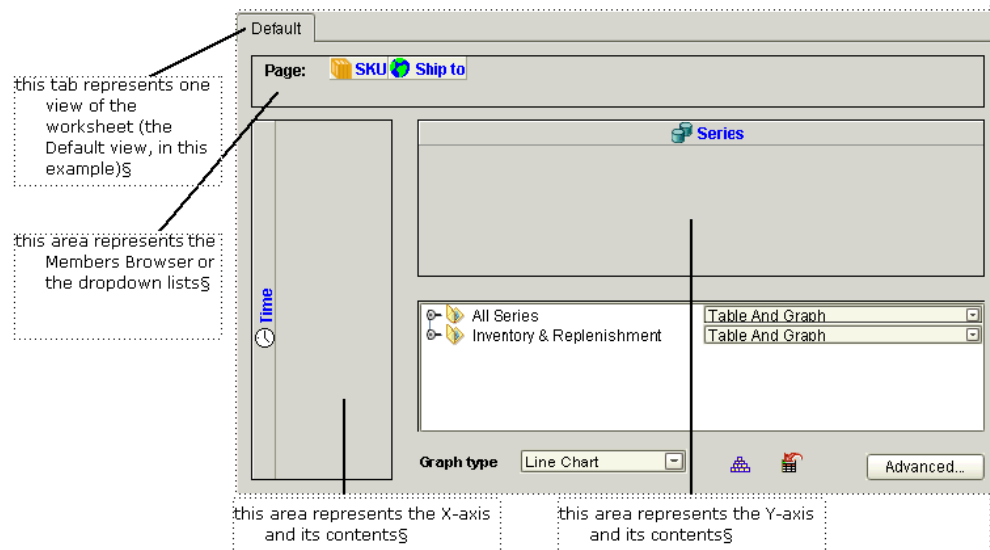
## Defining the View Layout

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:



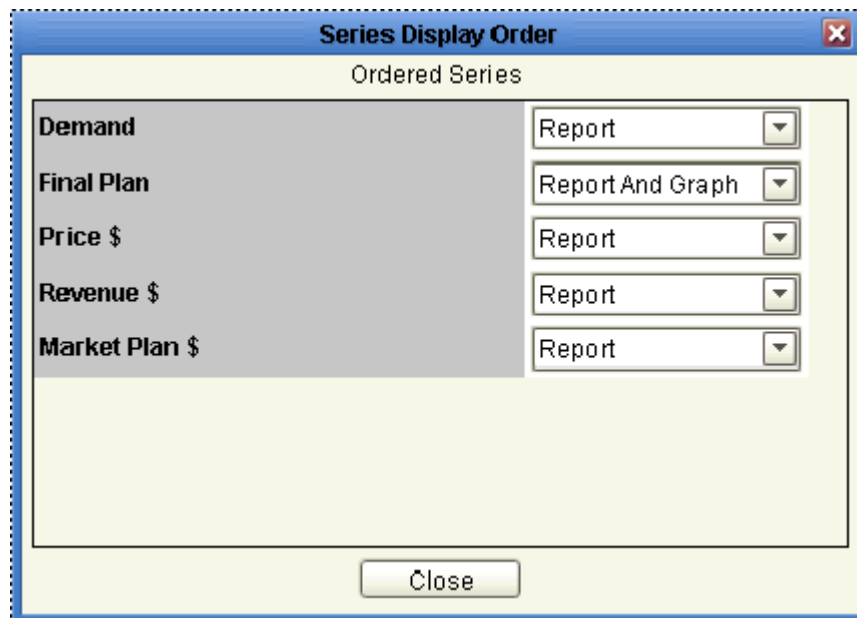
In addition, this screen displays the following icons:

- 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.

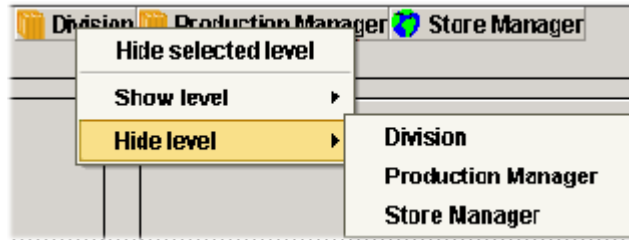
### To specify which levels to use in a worksheet view:

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 also

"Specifying the Worksheet Elements in a View"

"Displaying an Embedded Worksheet"

"Filtering a Worksheet View"

## 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:

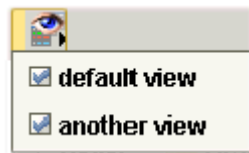
- Do not force synchronization between views
- Synchronize data between views

**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 also

"Defining the View Layout"

"Specifying the Worksheet Elements in a View"

"Displaying an Embedded Worksheet"

"Filtering a Worksheet View"

## Specifying the Worksheet Elements in a View

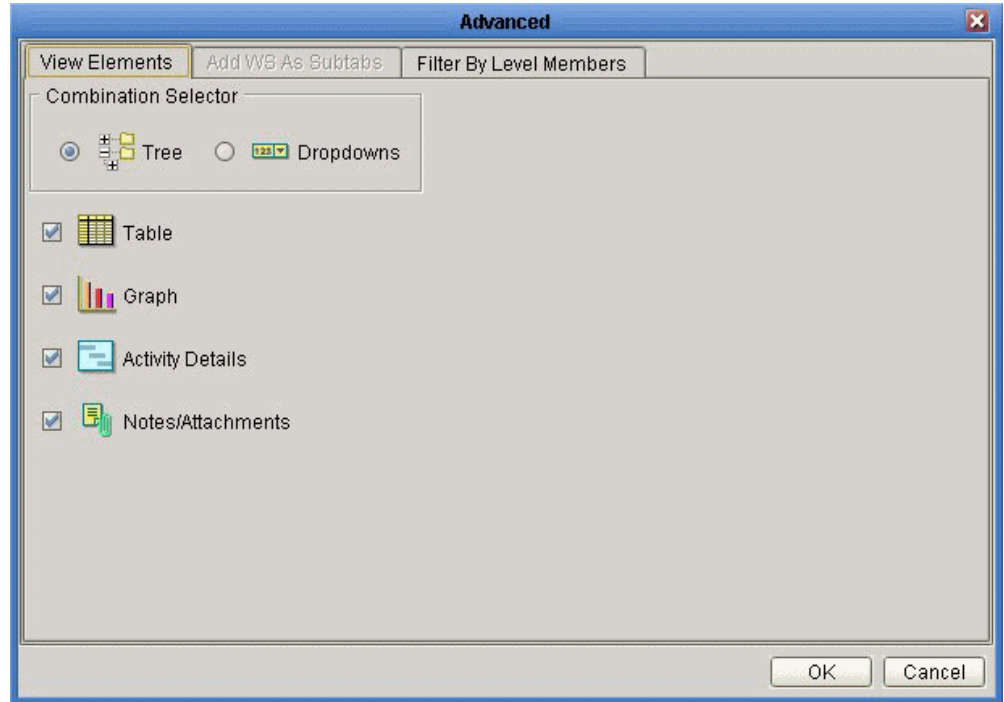
This section applies only to worksheets, not to content panes.

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.

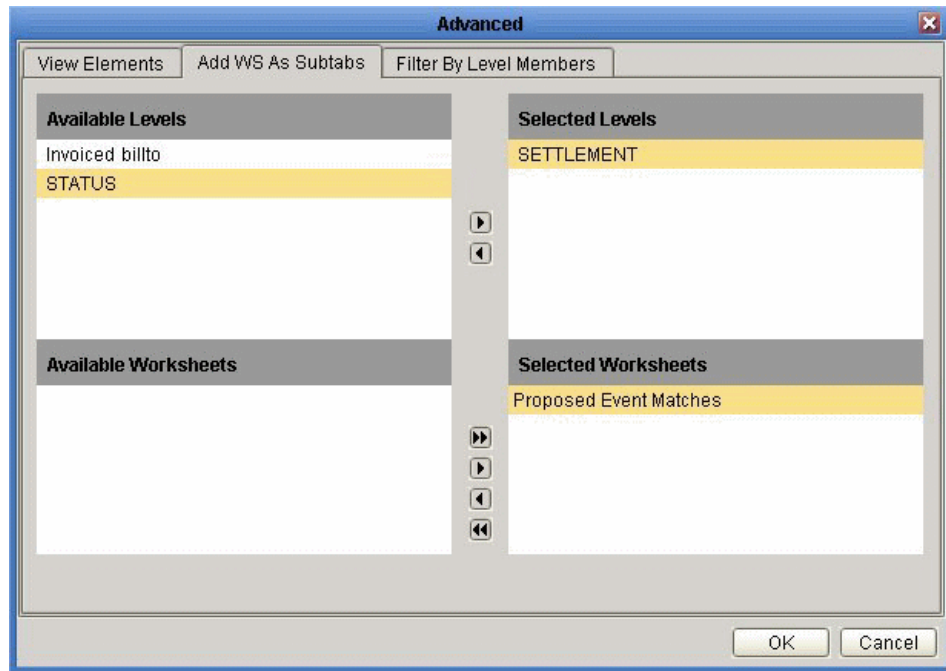
**Note:** The choice of worksheets you see depends on the level-worksheet associations that are controlled within the Business Modeler.

### 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.

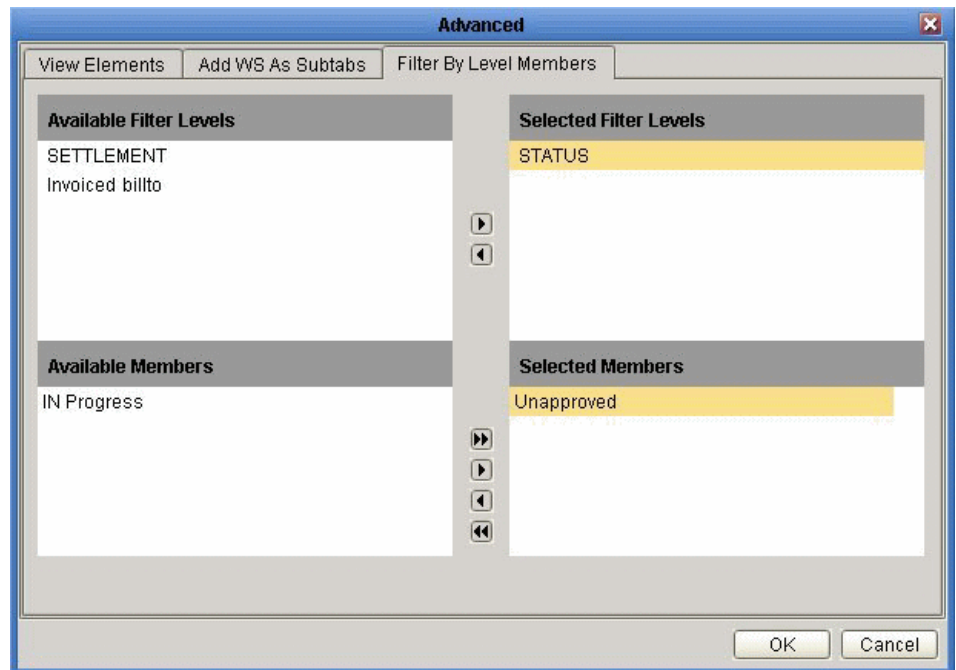
## Filtering a Worksheet View

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 also

"Configuring the Basics"

## 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.



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## Administration

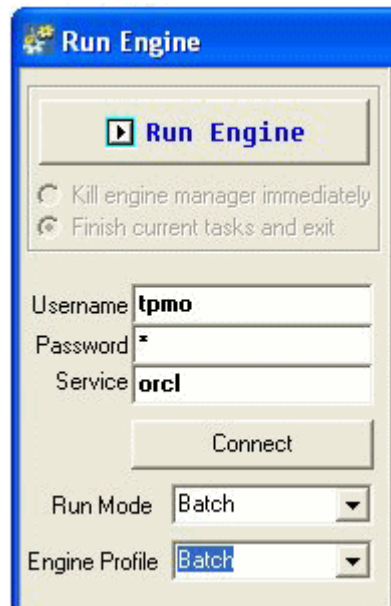
This chapter covers the following topics:

- 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 also

"Required Workflows"

## 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							<a href="#">New</a> <a href="#">Modify</a> <a href="#">Delete</a>			
Schema ID	Schema name	Owner	Creation Date	Last Modified	Instances	Status	Action			
1	<a href="#">Partner Plan collaboration</a>	dp	Feb 28 20:10:02 2003	Aug 21 16:56:46 2003	0	●	<a href="#">Edit</a>	<a href="#">Start</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>
2	<a href="#">Space_consumption_Alert</a>	guy_yehiav	Apr 14 21:21:45 2003	May 07 18:05:45 2003	0	●	<a href="#">Edit</a>	<a href="#">Start</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>
22	<a href="#">Stockout_Alert</a>	guy_yehiav	Apr 14 22:40:47 2003	Sep 22 16:31:00 2003	0	●	<a href="#">Edit</a>	<a href="#">Start</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>
23	<a href="#">CPFR_Step_1</a>	guy_yehiav	Apr 29 17:46:04 2003	Apr 29 17:46:34 2003	0	●	<a href="#">Edit</a>	<a href="#">Start</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>
43	<a href="#">Stockout_Alert_Per_Store</a>	guy_yehiav	May 08 13:05:53 2003	May 08 13:05:53 2003	0	●	<a href="#">Edit</a>	<a href="#">Start</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>
63	<a href="#">Export Dynamic Data</a>	Inv	May 16 09:59:59 2003	May 16 10:00:14 2003	0	●	<a href="#">Edit</a>	<a href="#">Start</a>	<a href="#">Schedule</a>	<a href="#">Delete</a>
							<a href="#">Process Log</a> <a href="#">New Schema</a> <a href="#">Refresh</a>			

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	<a href="#">Terminate</a>
				<a href="#">Back</a> <a href="#">Refresh</a>

2. When you are done, click Back.

## Scheduling Workflow Instances

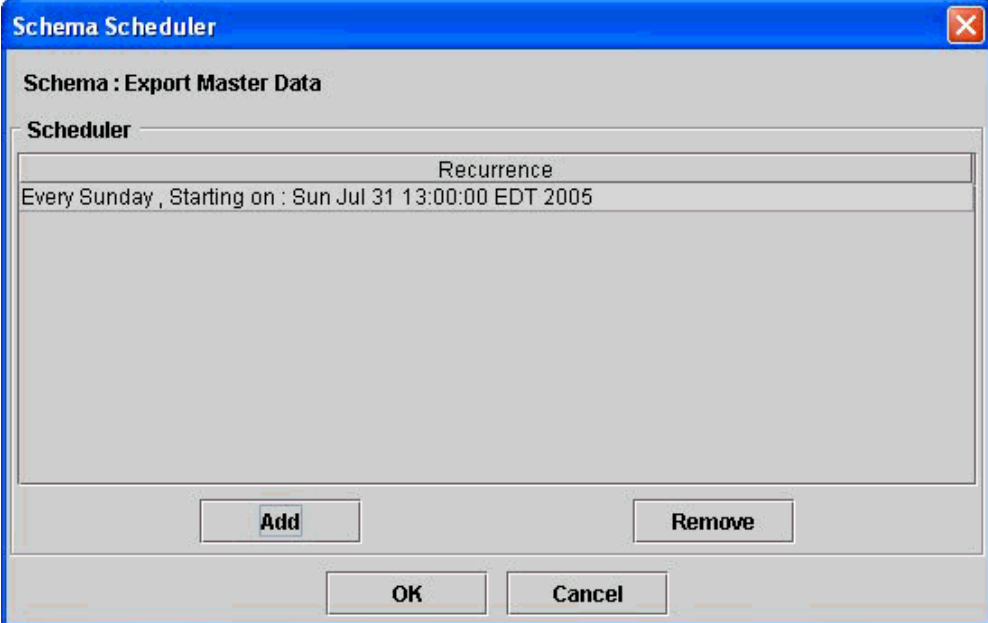
If you are the owner of a workflow, you can schedule an instance to start at a specific time or times. If you are not the owner, you cannot schedule it, although you can start it

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.



The screenshot shows a dialog box titled "Schema Scheduler" with a blue title bar and a red close button. The main content area is titled "Schema : Export Master Data" and contains a section labeled "Scheduler". Inside the Scheduler section, there is a table with two columns: "Recurrence" and "Starting on". The table contains one row with the text "Every Sunday , Starting on : Sun Jul 31 13:00:00 EDT 2005". Below the table, there are two buttons: "Add" and "Remove". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

3. Click Add.

The system displays the following page.

**Recurrence**

Schema : Export Master Data

**Recurrence**

Schedule Schema :      At :      Start On :

Daily      05:59 PM      07/28/2005

**Schedule Schema Daily**

Every 1 day(s)

OK      Cancel

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	<a href="#">Terminate</a>

[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 also

*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.

**Enter User Details**

User :	Jeff_Wilson	Integrate User: <input type="checkbox"/>
Password:	*****	
Permission Level:	Supervisor	
Language:	English	
First Name:	Jeff	
Last Name:	Wilson	
Company Name:	Rory's International	
Phone Number:		
Fax Number:		
E-Mail Address:	jwilson@rorys.com	

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.

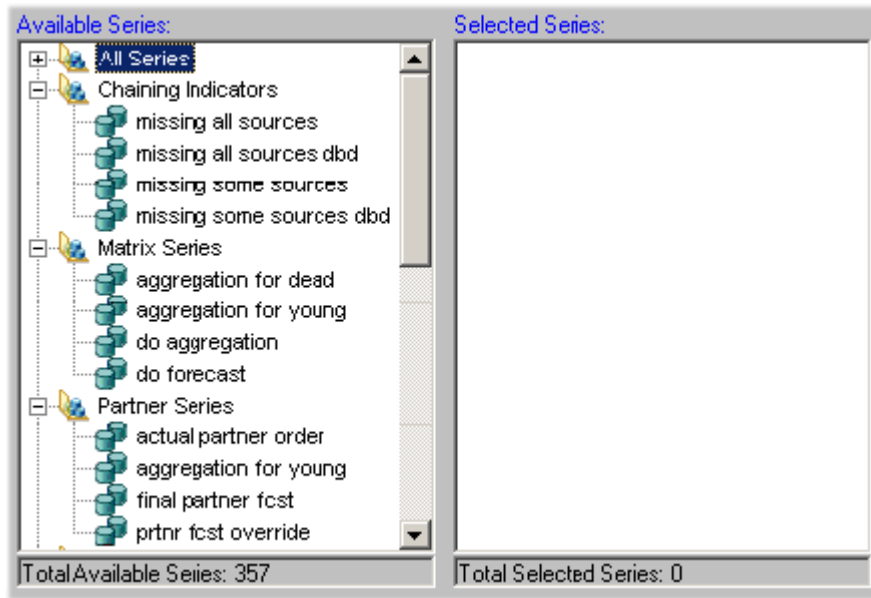
- The first and last name of the user, the company name, phone and fax number, and the email address.
2. For Permission Level, use System Manager if this user needs access to the Business Modeler and the Workflow Manager. Otherwise, use Supervisor.
  3. Click Next.

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	<input checked="" type="checkbox"/>	9983/9999	9999
Demantra Demand Planner	<input checked="" type="checkbox"/>	9982/9999	9999
Demantra Demand Planner Web	<input checked="" type="checkbox"/>	9982/9999	9999
Demantra Collaborator Workbench	<input checked="" type="checkbox"/>	9981/9999	9999
Demantra Anywhere	<input checked="" type="checkbox"/>	9990/9999	9999
Demantra Promotion Effectiveness	<input checked="" type="checkbox"/>	9981/9999	9999
Settlement Management	<input type="checkbox"/>	9999/9999	9999
Demantra Promotions Optimization	<input type="checkbox"/>	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.



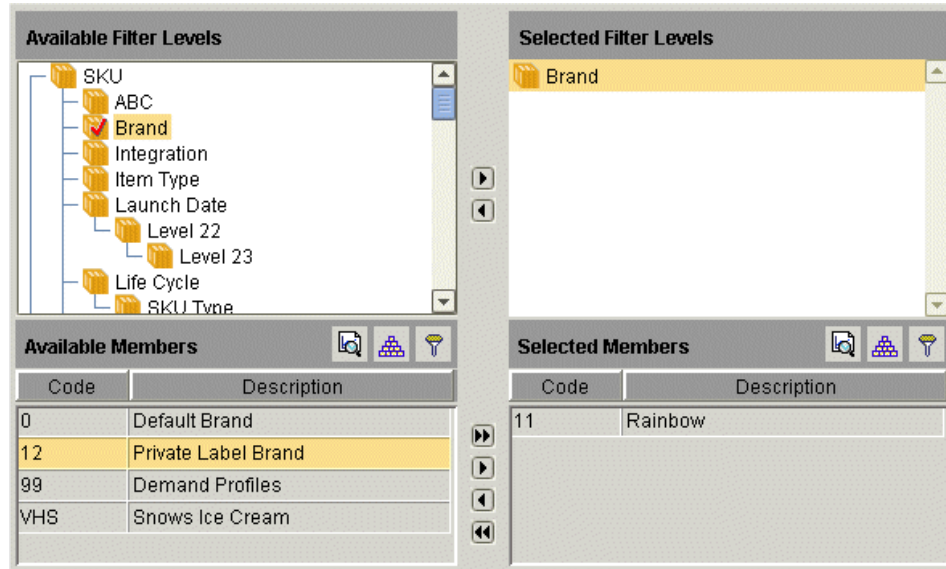
If a series is not active for a user, it is not available when the user creates worksheets and is not viewable in existing worksheets to which the user has access.

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 also

*Oracle Demantra Implementation Guide*





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## PTP Demo Script

This chapter covers the following topics:

- Overall Notes
- About World Brands
- User IDs and Passwords
- Configuring the PTP Demo for Demand Management
- PTP: Setting Quotas and Funds
- PMO: Creating, Simulating, and Optimizing a Promotion
- PMO: Committing a Promotion
- PMO: Examining Past Promotions

### Overall Notes

This chapter provides basic background information on the demo and walks you through all the elements of Oracle's PTP application, using the demo data as the sample.

To use the demo, you must have already started the following:

- Oracle - Always needed.
- Tomcat - Always needed.
- Simulation Engine - Needed if you are running simulations. See "Running the Analytical Engine in Simulation Mode".

In case of problems, see the Troubleshooting chapter in the *Oracle Demantra Implementation Guide*.

## About World Brands

This section introduces the company shown in the demo.

World Brands operates world wide, manufacturing consumer packaged goods and providing them to retailers who run more than 2,300 food and drug stores in more than 31 states coast to coast. The retailers (Albertsons, Safeway, Winn-Dixie, and others) operate food stores, drug stores, combination food and drug stores, and fuel centers.

Competitors to World Brands include Mega Products and Global Corp. World Brands has purchased syndicated data for those customers, and this data is loaded into PTP and available for analysis.

## Products

PTP provides a set of product and location hierarchies intended to suit a variety of organizations. Some of these levels are not used in PTP worksheets, but are available if needed for reporting.

For this demo, we focus on the analgesics that World Brands manufactures. World Brands produces many items in the analgesic category, and these are organized into multiple hierarchies. The demo uses two of these hierarchies.

### The Promotion Group Hierarchy

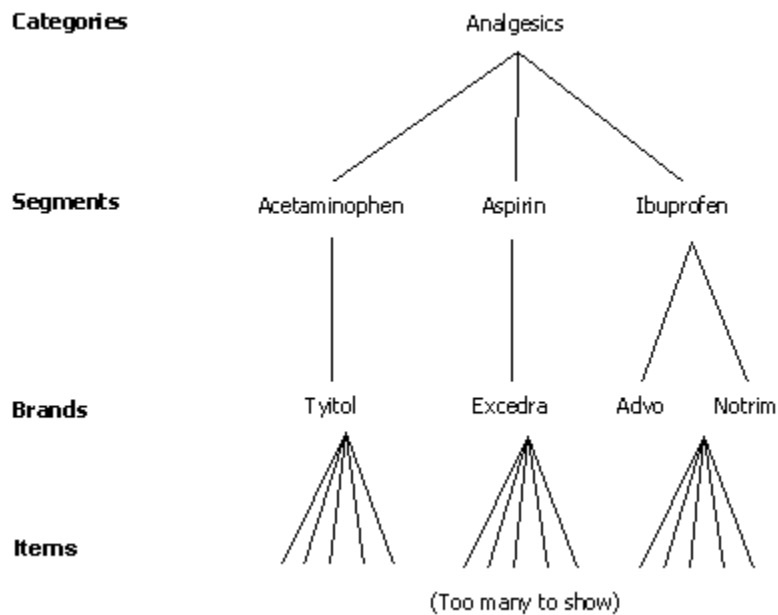
For analgesics, World Brands has about a dozen promotion groups, such as the following examples:

- Advo 100
- Advo 200
- Notrim 100
- Notrim 50

Promotions are usually created at this level, applying to entire sets of items.

### The Category Hierarchy

The analgesic products constitute one category, the only category shown in the demo. The category is subdivided as follows:



World Brands is often interested in viewing data at the brand level.

## Locations

As noted earlier, World Brands sells its products to multiple retailers, and PTP correspondingly displays data at the retailer level. PTP also lets you view the specific ship-to locations for each retailer, if needed.

In addition to being interested in the retailers, World Brands has an independent hierarchy of its own. It is divided into divisions, which consist of sales areas, which consist of regions. In turn, regions consist of districts, which consist of territories. For its own planning purposes, World Brands often likes to view data at the territory level.

PTP models the organization of Mega Products and Global Corp in the same way.

## User IDs and Passwords

The demo provides the following user IDs:

User ID	Password	Data access*	Purpose and notes**
ptp	ptp	all territories	superuser  This user has the System Manager permission level and therefore can log into administrative tools such as the Business Modeler and Workflow Manager.
Mgr1	m1	territories T1 + TG + TM	Manager of Sales1 user
Mgr2	m2	territories T2 + T3 + TG + TM	Manager of Sales2 and Sales 3 users
Sales1	s1	territories T1 + TG + TM	Sales representative for territory T1
Sales2	s2	territories T2 + TG + TM	Sales representative for territory T2
Sales3	s3	territories T3 + TG + TM	Sales representative for territory T3
testmgr1	t	territories T1 + TG + TM	Same as Mgr1
testmgr2	t	territories T2 + T3 + TG + TM	Same as Mgr2
test1	t	territories T1 + TG + TM	Same as Sales1
test2	t	territories T2 + TG + TM	Same as Sales2
test3	t	territories T3 + TG + TM	Same as Sales3

\*Territories TG and TM are the territories of the competitor; all users can view this data.

\*\*Apart from the ptp user, all users have the Supervisor permission level.

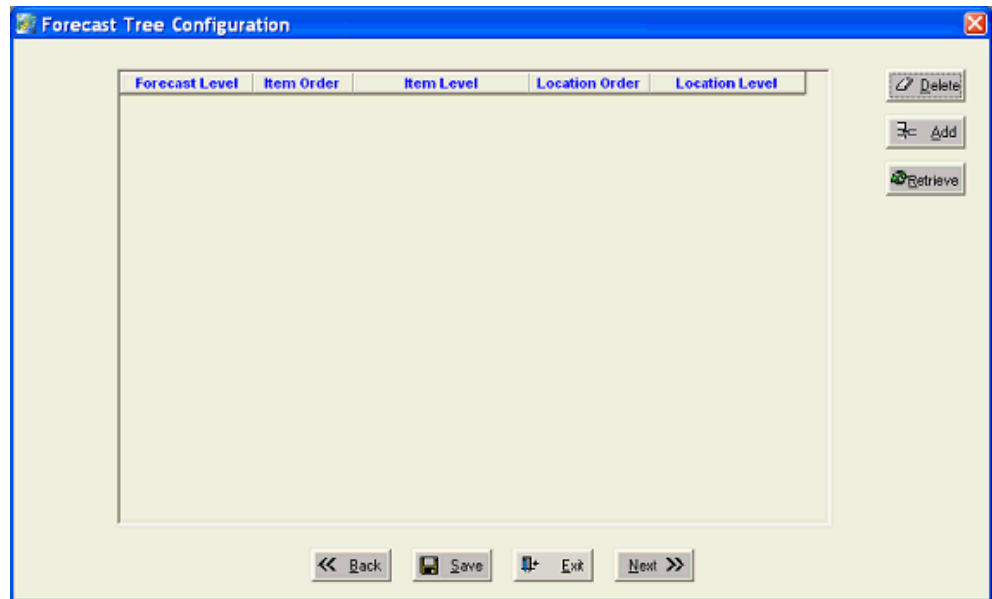
## Configuring the PTP Demo for Demand Management

This topic explains how to enable the analytics required for the PTP demo in the Demand Management application.

### To change the Demand Management model to support the PTP engine:

1. From the Business Modeler, navigate Engine > Forecast Tree.
2. Click Next

The Forecast Tree Configuration window appears.



3. Delete all forecast levels.
4. Click Save, and then click Next.

The Forecast Tree Definition window appears.

**Forecast Tree Definition**

**Items**

**Levels for Item Groups**

Item Level	Join Field
Release Month	t_ep_i_ATT_6_ep_id
Media Type	t_ep_i_ATT_8_ep_id
Product Weight	t_ep_i_ATT_10_ep_id
Product Size	t_ep_i_ATT_9_ep_id
UPC	t_ep_i_ATT_7_ep_id
Rating	t_ep_i_ATT_5_ep_id
Genre	t_ep_i_ATT_3_ep_id
Item Description	t_ep_i_ATT_1_ep_id

Add > < Remove Add All >> << Remove All

**Forecast Order for Items**

Order	Item Level
1	Lowest Item Level
2	Item
3	Product Category
4	Highest Fictive Level

**Location**

**Levels for Location Groups**

Location Level	Join Field
Store Size	t_ep_l_ATT_1_ep_id
Store Classification	t_ep_l_ATT_2_ep_id
Customer Segment	t_ep_l_ATT_4_ep_id
Store Language	t_ep_l_ATT_6_ep_id
Zipcode	t_ep_l_ATT_8_ep_id
City	t_ep_l_ATT_10_ep_id
Store Demographic	t_ep_l_ATT_9_ep_id

Add > < Remove Add All >> << Remove All

**Forecast Order for Location**

Order	Location Level
1	Lowest Location Level
2	Trading Partner Zone
3	Zone
4	Highest Fictive Level

Save Exit Next >>

- Remove all levels from the right panes that are not defined either as the Lowest or the Highest levels.

**Forecast Tree Definition**

**Items**

**Levels for Item Groups**

Item Level	Join Field
Release Month	t_ep_i_ATT_6_ep_id
Media Type	t_ep_i_ATT_8_ep_id
Product Weight	t_ep_i_ATT_10_ep_id
Product Size	t_ep_i_ATT_9_ep_id
UPC	t_ep_i_ATT_7_ep_id
Rating	t_ep_i_ATT_5_ep_id
Genre	t_ep_i_ATT_3_ep_id
Item Description	t_ep_i_ATT_1_ep_id

Add > < Remove Add All >> << Remove All

**Forecast Order for Items**

Order	Item Level
1	Lowest Item Level
2	Highest Fictive Level

**Location**

**Levels for Location Groups**

Location Level	Join Field
Store Size	t_ep_l_ATT_1_ep_id
Store Classification	t_ep_l_ATT_2_ep_id
Customer Segment	t_ep_l_ATT_4_ep_id
Store Language	t_ep_l_ATT_6_ep_id
Zipcode	t_ep_l_ATT_8_ep_id
City	t_ep_l_ATT_10_ep_id
Store Demographic	t_ep_l_ATT_9_ep_id

Add > < Remove Add All >> << Remove All

**Forecast Order for Location**

Order	Location Level
1	Lowest Location Level
2	Highest Fictive Level

Save Exit Next >>

- Add levels Promotion Group, Brand and Category to Forecast Orders for Items, in that order.
- Add levels Territory Retailer and Retailer to Forecast Order for Location, in that order.

**Forecast Tree Definition**

**Items**

**Levels for Item Groups**

Item Level	Join Field
Release Month	t_ep_i_ATT_6_ep_id
Media Type	t_ep_i_ATT_8_ep_id
Product Weight	t_ep_i_ATT_10_ep_id
Product Size	t_ep_i_ATT_9_ep_id
UPC	t_ep_i_ATT_7_ep_id
Rating	t_ep_i_ATT_5_ep_id
Genre	t_ep_i_ATT_3_ep_id
Item Description	t_ep_i_ATT_1_ep_id

Add > < Remove Add All >> << Remove All

**Forecast Order for Items**

Order	Item Level
1	Lowest Item Level
2	Promotion Group
3	Brand
4	Category
5	Highest Fictive Level

**Location**

**Levels for Location Groups**

Location Level	Join Field
Store Size	t_ep_L_ATT_1_ep_id
Store Classification	t_ep_L_ATT_2_ep_id
Customer Segment	t_ep_L_ATT_4_ep_id
Store Language	t_ep_L_ATT_6_ep_id
Zipcode	t_ep_L_ATT_8_ep_id
City	t_ep_L_ATT_10_ep_id
Store Demographic	t_ep_L_ATT_9_ep_id

Add > < Remove Add All >> << Remove All

**Forecast Order for Location**

Order	Location Level
1	Lowest Location Level
2	Territory Retailer
3	Retailer
4	Highest Fictive Level

Save Exit Next >>

8. Click Next.

The Forecast Tree Configuration window appears.

9. Configure the forecast tree as shown in the following screen capture.

**Forecast Tree Configuration**

Forecast Level	Item Order	Item Level	Location Order	Location Level
1	1	Lowest Item Level	1	Lowest Location Level
2	2	Promotion Group	2	Territory Retailer
3	3	Brand	3	Retailer
4	4	Category	3	Retailer
5	5	Highest Fictive Level	4	Highest Fictive Level

Delete Add Retrieve

<< Back Save Exit Next >>

10. Click Save and click Next

The Forecast Tree - Promotion Levels window appears.

11. Configure promotional levels as shown in the following screen capture.

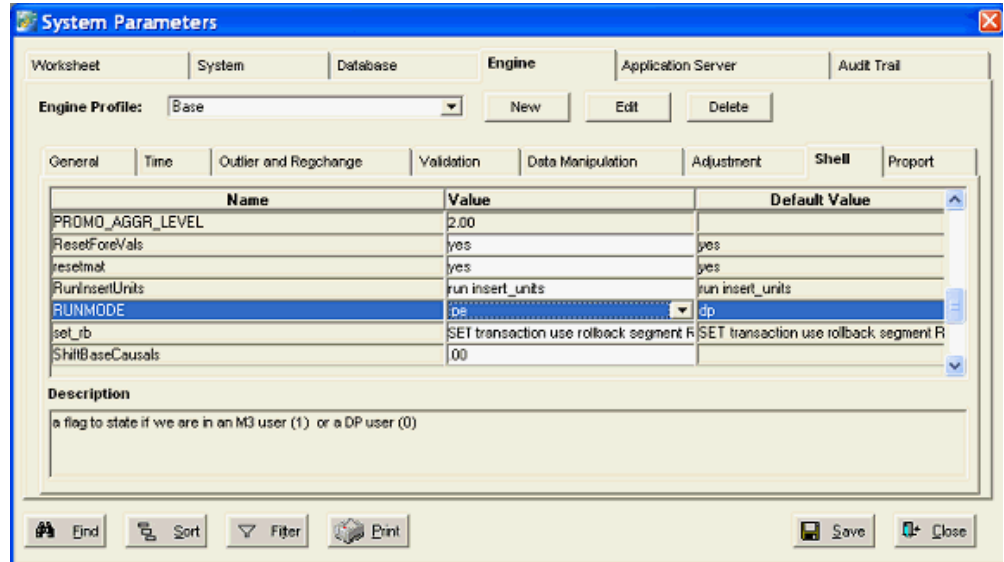
The screenshot shows a window titled "Forecast Tree - Promotions Levels". Inside the window is a table with the following data:

Forecast Level	Item Level	Location Level	Promotion Level Type
1	Lowest Item Level	Lowest Location Level	
2	Promotion Group	Territory Retailer	Lowest Promotion Level
3	Brand	Retailer	Influence Group
4	Category	Retailer	Influence Range
5	Highest Fictive Level	Highest Fictive Level	

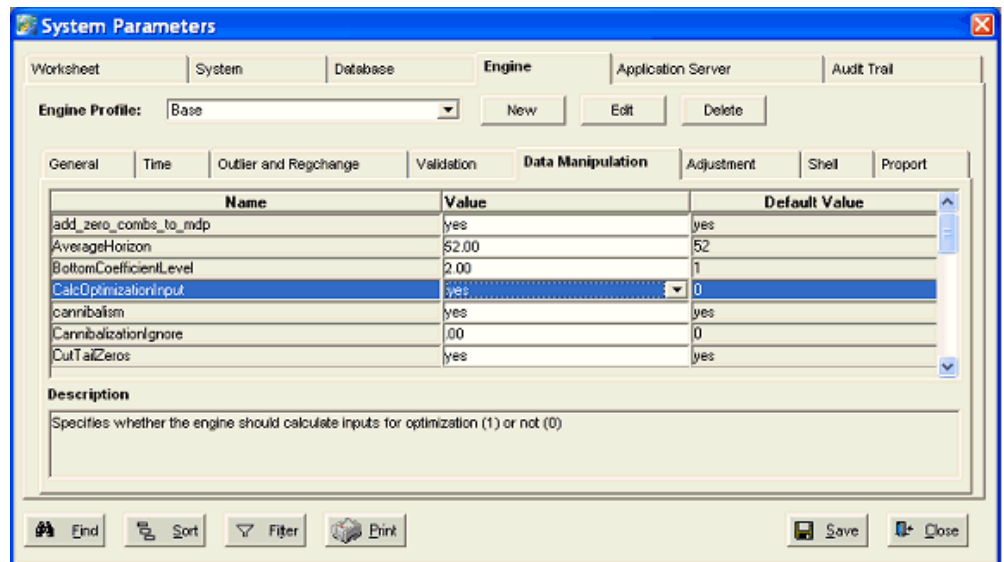
At the bottom of the window, there are four buttons: "<< Back", "Save", "Exit", and "Next >>".

12. Click Save, and then click Exit.
13. Navigate to Parameters > System Parameters.  
The System Parameters window appears.
14. Choose the Engine Tab and the Shell sub-tab.
15. Find Parameter RUNMODE and change the Value to pe from the Default Value dp.

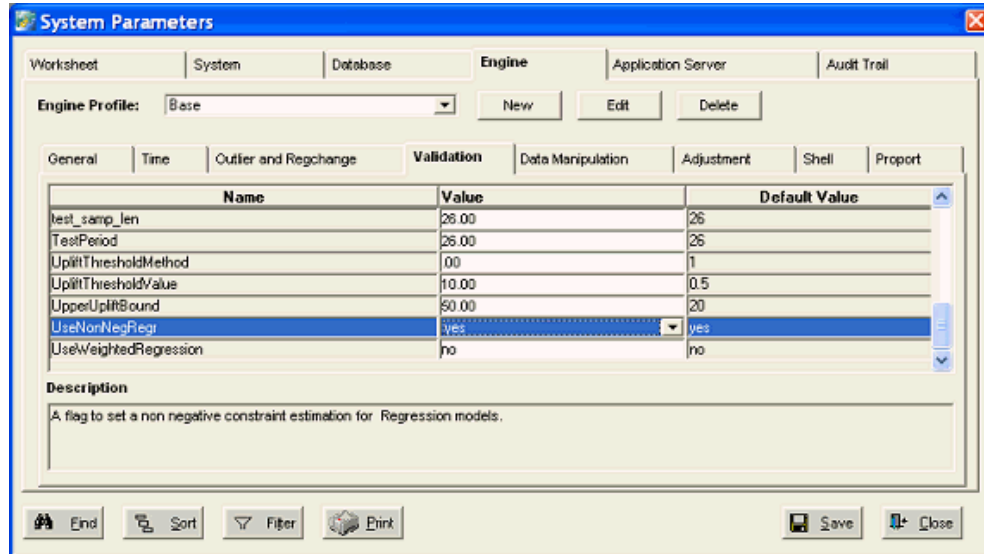




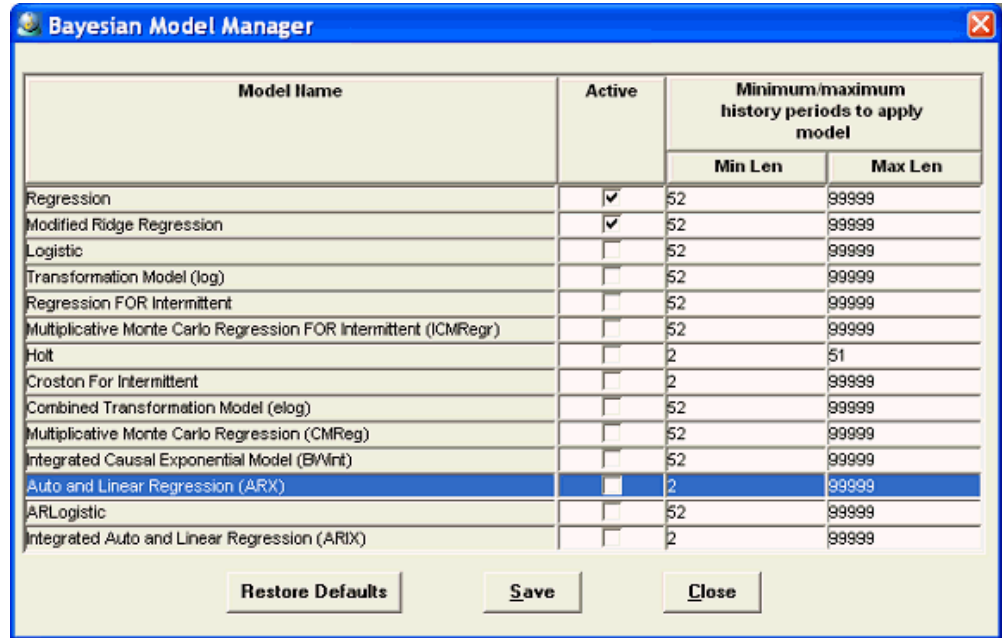
16. In Data Manipulation sub-tab change parameter CalcOptimizationInput to Yes.



17. In the Validation sub-tab change the parameter UseNonNegRegr from no to yes



18. Save and Close
19. From the Business Modeler, navigate Engine > Model Library. Ensure that only Regression and Modified Ridge Regression (if enabled) are active, and all other models are unchecked.



20. Click Save, and then click Close.

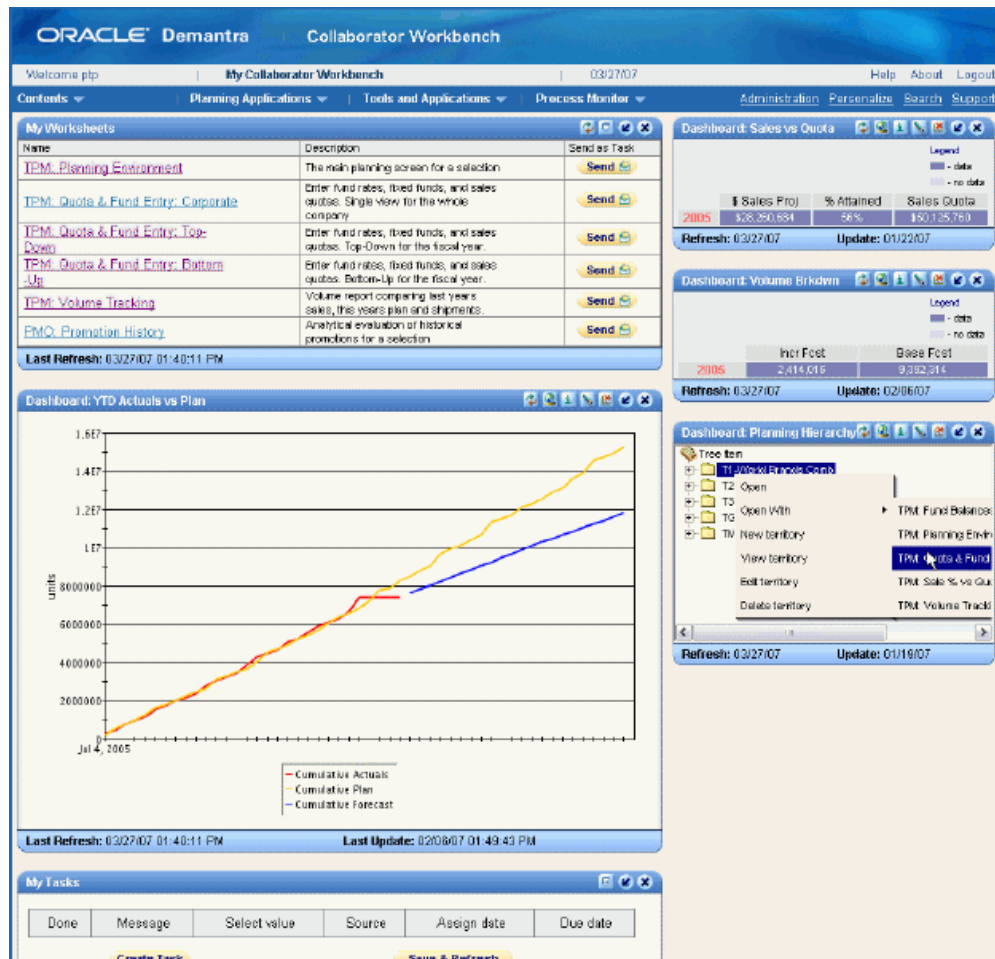
21. Run the Analytical Batch Engine

## PTP: Setting Quotas and Funds

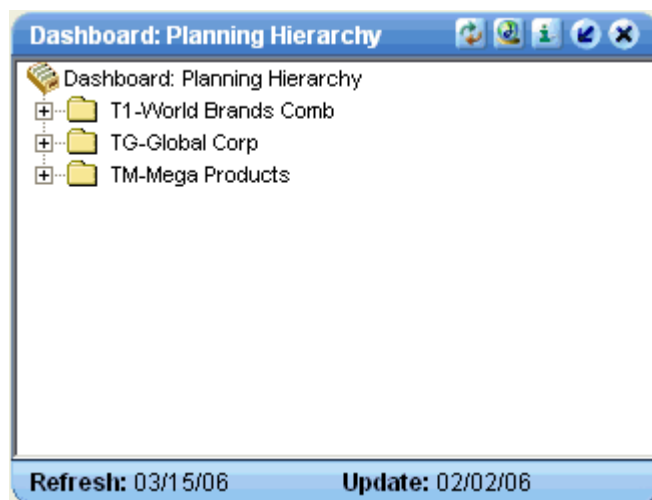
We will start by acting as a sales manager and adjusting some quotas and funds for a territory.

1. In Windows, click Start and click Programs. Then click Demantra > Demantra Spectrum release > Collaborator Workbench.
2. In the Log On dialog box, enter the user name Mgr1 and the password m1.
3. Click Login.

Now the dashboard, Collaborator Workbench, is displayed:

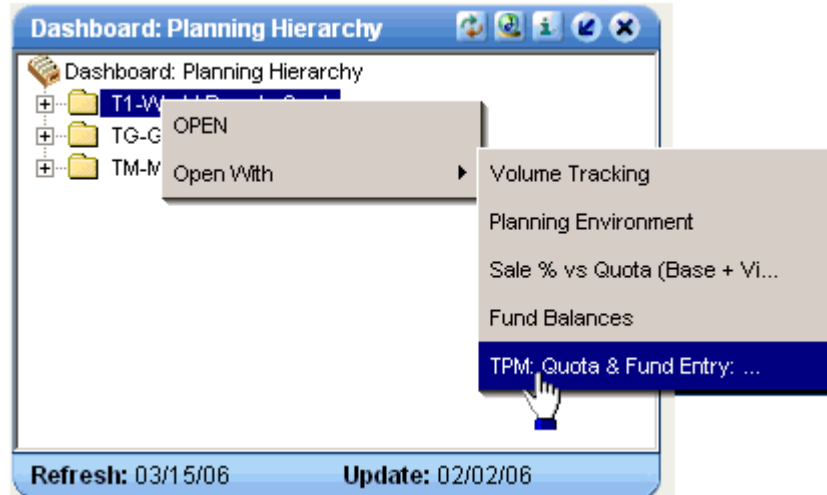


We will look at this screen more closely later. For now, we are interested only in the Planning Hierarchy area:

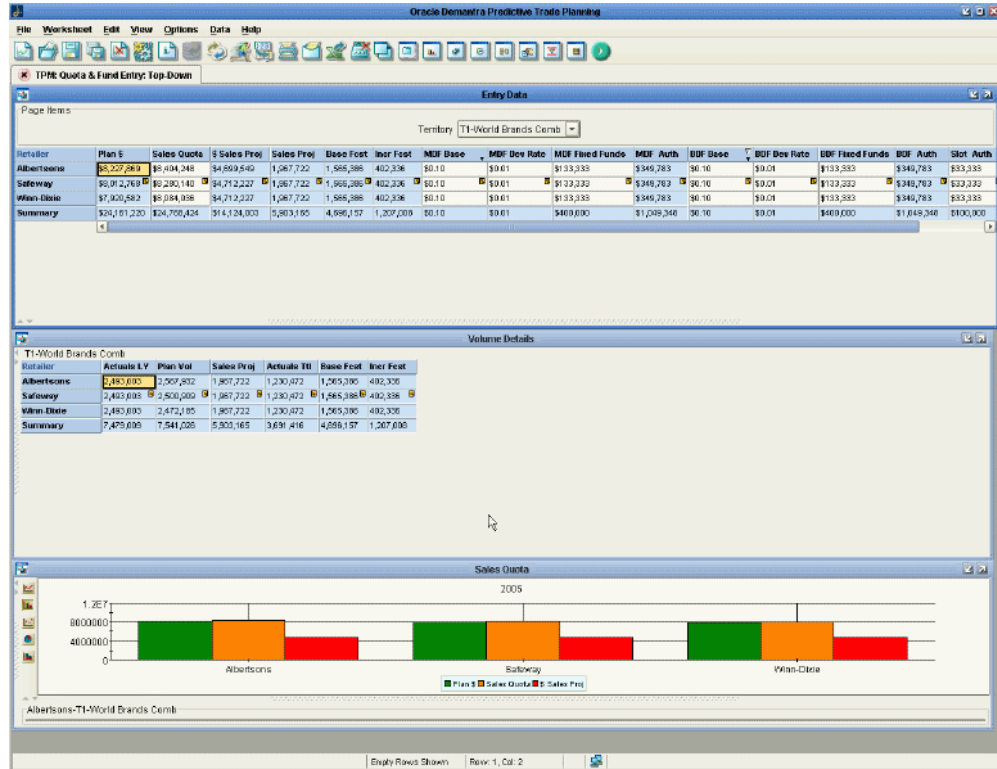


This displays all the territories that Mgr1 has access to view, namely Territory T1 of World Brands, as well as TG and TM, which represent the competitors of World Brands.

4. Right-click T1 and select Open With > PTP: Quota and Fund Entry: Top-Down.



This brings up the following screen:



This worksheet has been filtered to display only the territory we started from, T1. (Notice that the dropdown list includes only this territory. If we had opened the worksheet from My Worksheets instead, then we would have a list of all this user's territories.)

The Entry Data area shows each retailer in this territory with the yearly quota and funds for that retailer. Typically this information is established at the start of a year. (We use this worksheet for top-down data entry; another worksheet is available to fine-tune details at lower levels.)

5. Make the following changes:

For Albertson's, change Sales Quota to 8,500,000.

In the MDF Base Rate column, select the three cells for the three displayed retailers, right-click and select Edit Cells. A small dialog box is displayed. Here, type the value 0.20 and click OK.

Notice that as soon as you change the MDF Base Rate, the values for MDF Auth and Ttl Fund Auth change.

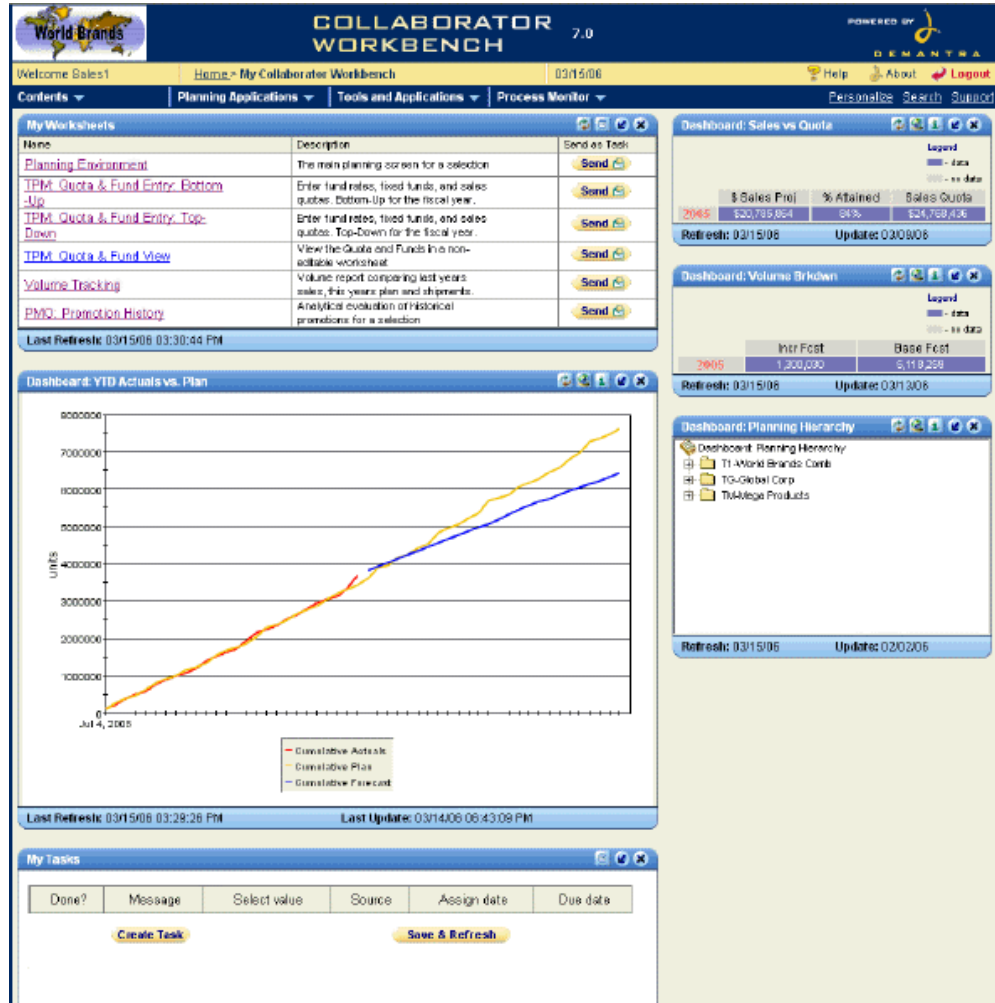
6. Click Data > Save Data. Or click the Save Data button.
7. Optionally log this user out. To do so, go to the Collaborator Workbench and click Log Out.

## **PMO: Creating, Simulating, and Optimizing a Promotion**

In this segment, we will act as the sales representative Sales1, who is responsible for the T1 territory.

1. In Windows, click Start and click Programs. Then click Demantra > Demantra Spectrum release > Collaborator Workbench.
2. In the Log On dialog box, enter the user name Sales1 and the password s1.
3. Click Login.

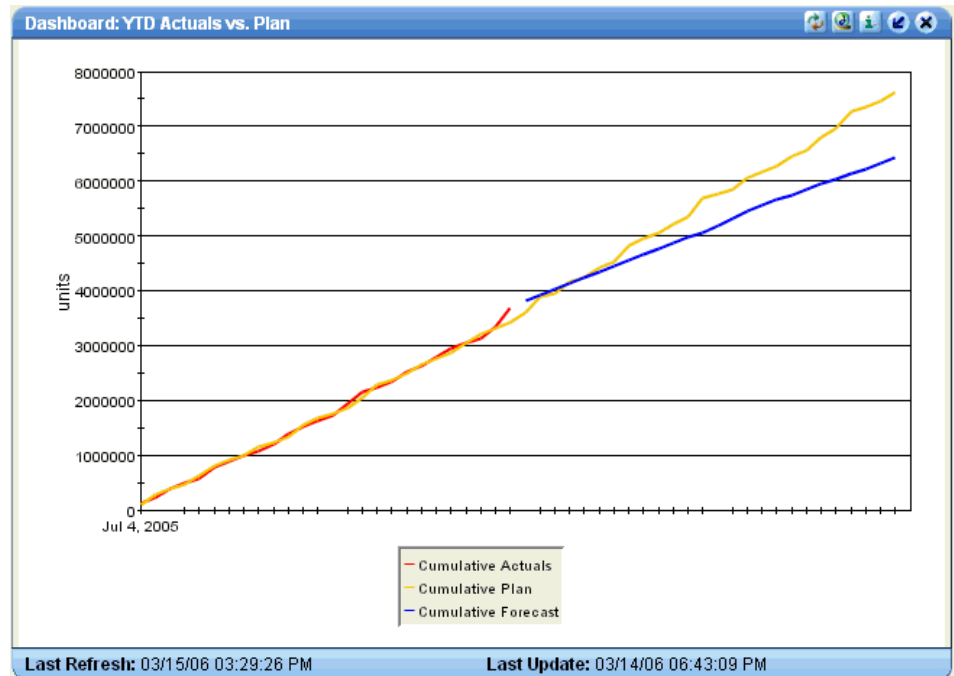
Now the Collaborator Workbench is displayed:



Here, notice the following points:

- This is a personalized page for Sales1. This user can customize it if needed.
- My Worksheets lists worksheets that Sales1 uses often.
- The Planning Hierarchy displays all the territories that Sales1 has access to view, namely Territory T1 of World Brands, as well as TG and TM, which represent the competitors of World Brands.
- The data displayed here is filtered to display data only for this user's territory.
- The Actuals versus Plan window shows how the forecast is tracking, compared to the plan:

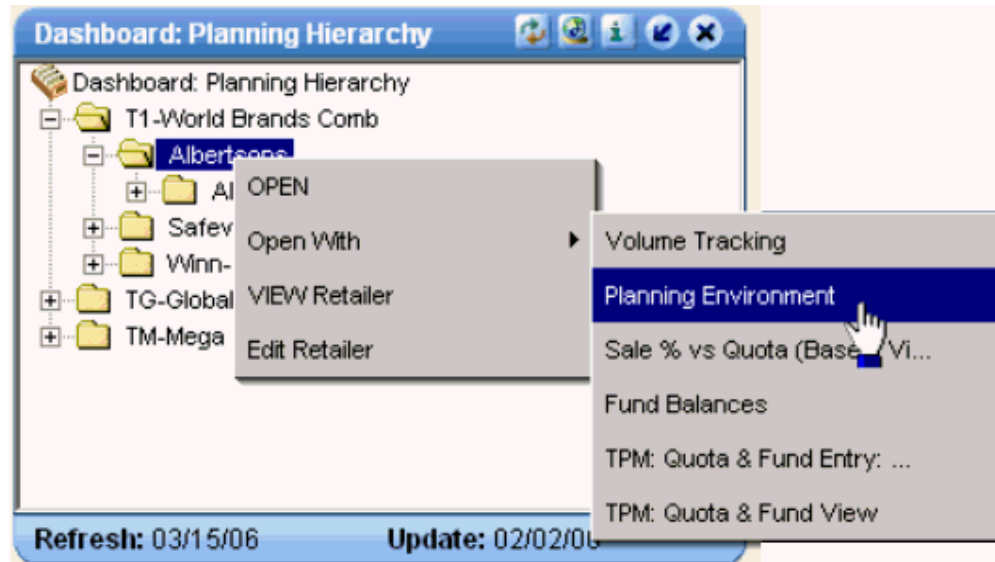




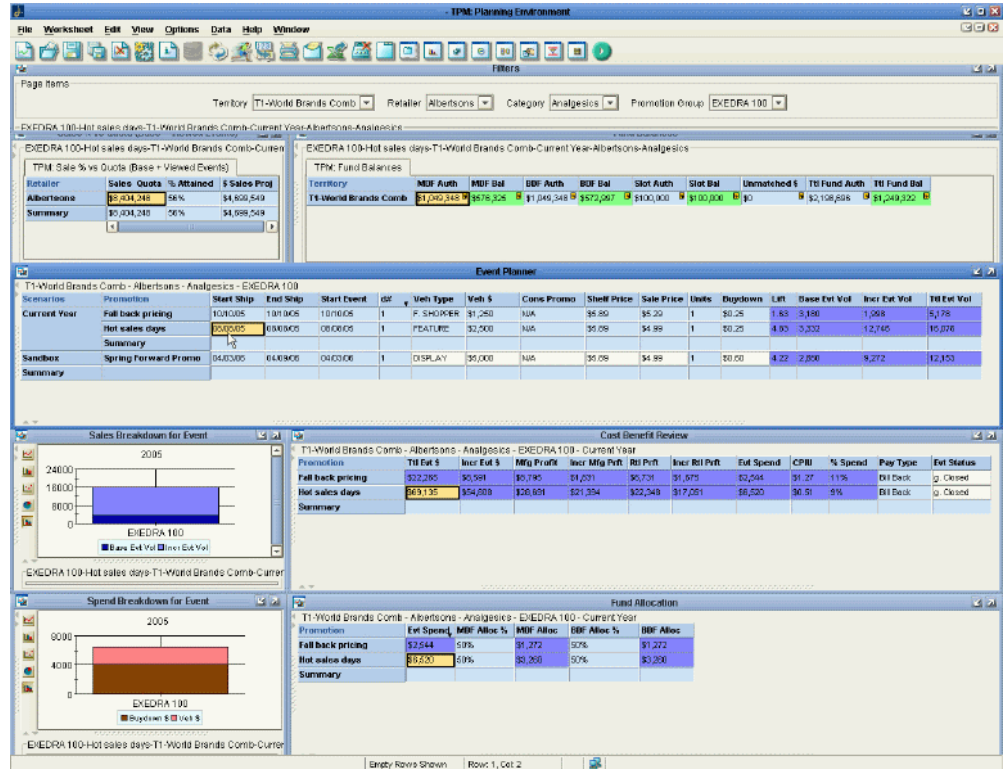
As you can see, the forecasted volume is lower than the plan, so it is necessary to create some promotions to increase the volume.

We will focus on Albertson's for this activity.

4. In the Planning Hierarchy area, expand T1 to display Albertson's.
5. Then right-click Albertson's and select Open With > Planning Environment.



This brings up the Planning Environment, which is the entry point for creating and analyzing promotional events.



Because we opened this worksheet this way, it is filtered to display only data for Albertson's.

6. Notice the following points:

- Sales % vs. Quota displays the quota and sales projections for this retailer.
- Fund Balances displays the funds for the territory T1 (aggregated across all retailers).
- Event Planner and the rest of the windows display data for the currently selected promotion group.

7. At the of the screen, select the Excedra 100 promotion group.

8. In the Event Planner area, right click in the Promotion column. Then click Create Promotion.

A window like the following is displayed:

**NEW Promotion : April End Special (Input)**

Name: April End Special

Population:

- Promotion Group: EXEDRA 100
- Territory: T1-World Brands Comb
- Retailer: Albertsons

Edit

Dates: Start: 04/24/2006 End: 04/30/2006

Start Ship: 04/01/2006

End Ship: 04/30/2006

Scenarios: Sandbox

Vehicle Type: DISPLAY

Cons Promo: N/A

Cancel Create

The name is initially blank. The Population area indicates where the promotion will run, which is by default the same as the currently selected promotion group and retailer. The Dates are initialized according to default configurable values.

9. For Name, type April End Special.
10. Click Start and change it to 4/24/2006.
11. Click End and change it to 4/30/2006.
12. Enter the following other details:
  - Start Ship: 4/1/2006
  - End Ship: 4/30/2006
  - Scenarios: Sandbox
  - Vehicle Type: Display
13. Click Create.

PTP creates this promotion immediately and reruns the worksheet. The Event Planner area displays the new promotion as follows:

Event Planner													
Scenario	Promotion	Start Ship	End Ship	Start Event	#Units	Unit Type	Unit \$	Case Promo	Shelf Price	Sale Price	Units	Buydown	Lift
Current Year	Fall back pricing	10/16/2005	10/16/2005	10/16/2005	1	F-SHOPPER	\$1,250	100	\$5.89	\$5.29	1	\$0.25	1.45
	Hot sales days	03/06/2005	03/06/2005	03/06/2005	1	FEATURE	\$2,500	100	\$5.89	\$4.99	1	\$0.25	4.85
	Summary												
Sandbox	Spring Forward Promo	04/03/2006	04/03/2006	04/03/2006	1	FSD	\$10,000	100	\$5.89	\$4.99	1	\$0.10	6.95
	April End Special	04/03/2006	04/03/2006	04/03/2006	1	DISPLAY	\$5,000	100	\$5.89	\$5.29	1	\$0.10	1.90
	Summary												
Summary													

Notice the following points:

- April End Special has an initial vehicle cost. PTP initialized this based on the vehicle type and the retailer profile for Albertson's.
- The shelf price is the normal shelf price for this promoted group.
- The sale price and the buydown are both initialized as 0.
- The Incr Evt Vol is zero, because we do not yet have a forecast for this new promotion.
- In Sales % vs. Quota, the sales projections for this retailer have not yet changed, for the same reason.

14. Enter the following details for April End Special:

- Sale price: 5.29
- Buydown: 0.10

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

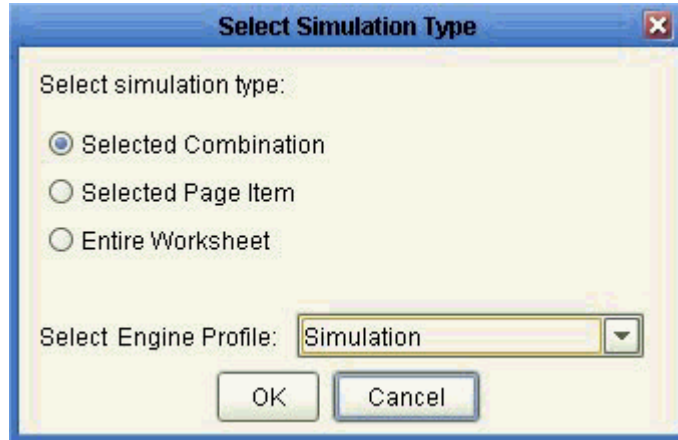
To go further, we need a forecast for this promotion, so we will run a simulation. We can do that any worksheet, but we will not see cannibalization effects if we run the simulation here, because the Analytical Engine doesn't have access to all the data it needs in this worksheet. For now, though, we are interested only in the incremental volume, so we will run the simulation here.

Before we can run a simulation that, we must make sure the Simulation Engine is running so that it can process our request.

16. In Windows, click Start and click Programs. Then click Demantra > Demantra Spectrum release > Simulation Engine.

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

The Select Simulation Type page appears.



18. Click Selected Combination.
19. For Select Engine Profile, click Simulation.
20. Click OK.

Depending on the amount of data in your worksheet, simulation may take a few minutes.

21. When the simulation is complete, Demantra displays a message. Click OK.
22. Rerun the worksheet.

Examine the Event Planner area:

Event Planner													
Scenario	Promotion	Start Ship	End Ship	Start Event	#Wks	Veh Type	Veh \$	Cone Promo	Shelf Price	Sale Price	Units	Buydown	Lift
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	1	\$0.25	1.83
	Hot sales days	09/06/2005	09/06/2005	09/06/2005	1	FEATURE	\$2,500	N/A	\$5.89	\$4.89	1	\$0.25	4.83
	Summary												
Sandbox	Spring Forward Promo	04/03/2006	04/03/2006	04/03/2006	1	FSD	\$10,000	N/A	\$5.89	\$4.89	1	\$0.10	6.55
	April End Special	04/01/2006	04/30/2006	04/24/2006	1	DISPLAY	\$5,000	N/A	\$5.89	\$5.29	1	\$0.10	2.54
	Summary												
Summary													

Notice the following changes:

- The lift for April End Special is 2.54.
- The incremental event volume is 6,066 units.

On the other hand, notice that Sales % vs. Quota and Fund Balances have not been changed. That is because this promotion is still unplanned. We will change its status later and see how that impacts the projections and funds.

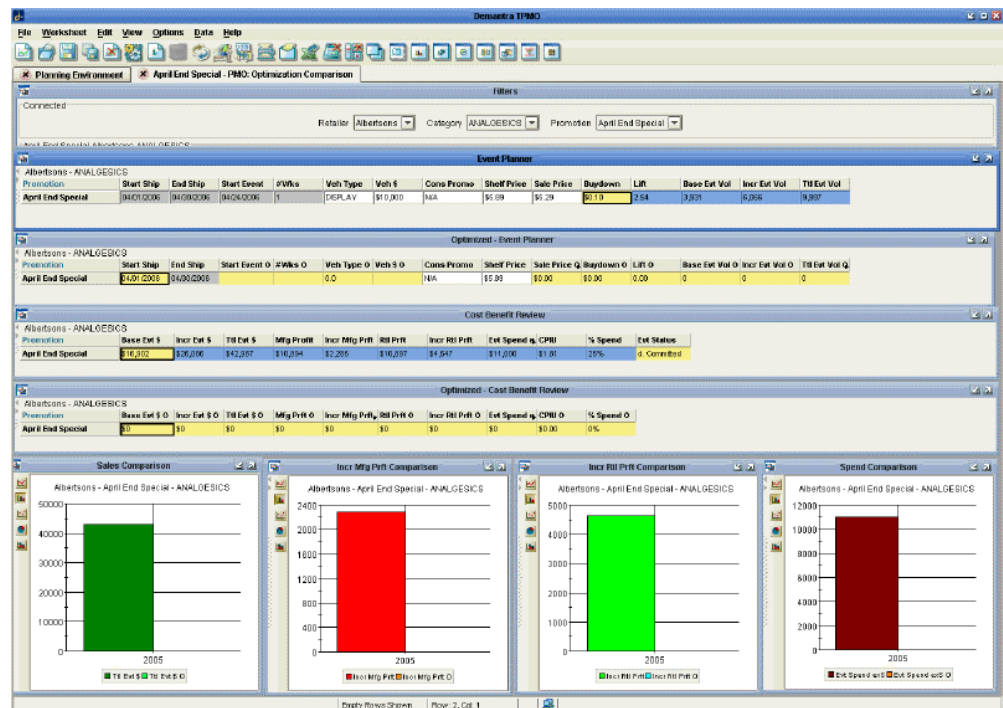
At this point, we could enter a different sale price, vehicle type, or other details and resimulate this promotion, to get a different lift. Rather than doing that repeatedly, however, we will run the optimizer. The best place to perform optimization is the

PMO: Optimization Comparison worksheet, which displays before and after details. So we will drill down to that worksheet.

**Note:** Leave the Planning Environment open, however, because we will return to it.

23. Right-click April End Special and select Open With > PMO: Optimization Comparison.

The system displays the following screen:



This worksheet is meant to display the promotion in its current state, side by side with the optimized version of the promotion. Notice that the optimized version is not present yet.

- The Optimized - Event Planner and Optimized - Cost Benefit Review windows are empty.
  - Each of the graphs shows only one bar, the bar that corresponds to the promotion as it currently is.
24. Right-click the promotion and click Methods > Optimize.
  25. The system displays the following screen, asking for details about how to optimize this promotion:

**Optimize Promotion : April End Special (Input)**

Name: April End Special

Population:

Promotion Group: EXEDRA 100

Territory: T1-World Brands Comb

Retailer: Albertsons

View

Dates: Start: 04/24/2006 End: 04/30/2006

Optimization Goal: Maximize Revenue

Max Budget:

Optimization Range Start:

Optimization Range End:

Buydown Generation Method: Fixed Buydown

Max Buydown:

Min Rtl Margin Override:

Optimization Status: No Optimization Executed

☒ Save parameters

Cancel Optimize

26. For this example, choose the following details:

- Optimization Goal: Maximize Revenue (rather than maximizing units or profit)
- Buydown Generation Method: Fixed Buydown (this will preserve the buydown that we entered previously, rather than calculating a different buydown for this promotion)

27. Click Optimize.

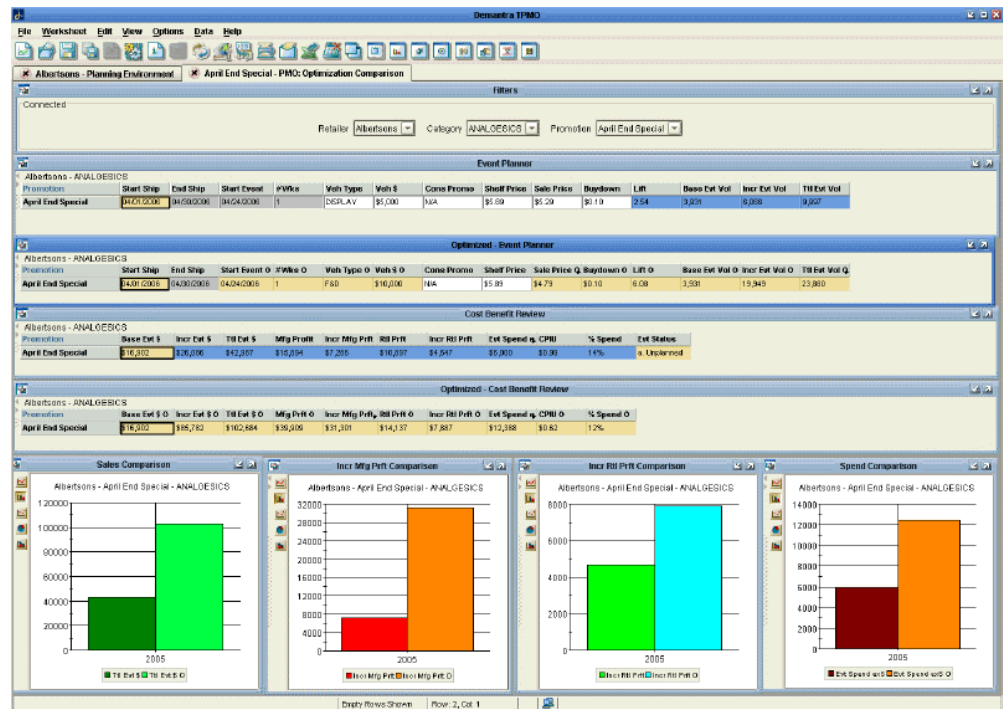
Now the system will select the promotion parameters (sale price, vehicle type, and so on) that best meet this goal.

**Note:** The optimizer considers only variations that are similar to promotions that ran in the past for this promotion group. So if this promotion group has never run a TPR-type promotion, the optimizer will not consider such a variation.

When optimization is complete, PTP displays a message asking if you want to rerun the worksheet.



28. Click OK.



Notice that the optimized promotion is now displayed throughout the worksheet:

- The Optimized - Event Planner and Optimized - Cost Benefit Review windows show details for the optimized version.
- Each of the graphs shows two bars.
- Also notice that the Evt Status is displayed in yellow. This indicates that this promotion has been optimized but not yet accepted. (This color change, for Evt Status, applies in the Planning Environment and all other worksheets, which means that you can tell if optimization has been run, even if that worksheet does not have all the details seen here.)

The optimized version is different from the original in several ways. For example, the sale price and vehicle type are different. The lift for this promotion is much higher, as is the revenue.

29. Compare the cost benefit reviews of the original promotion and the optimized promotion:

Cost Benefit Review											
Albertsons - ANALGESICS											
Promotion	Base Est \$	Incr Est \$	Ttl Est \$	Mfg Profit	Incr Mfg Prft	Rtl Prft	Incr Rtl Prft	Est Spend q, CPM	% Spend	Est Status	
April End Special	\$16,802	\$26,266	\$42,507	\$15,284	\$7,206	\$10,697	\$4,647	\$0.00	\$0.59	14%	Unplanned

Optimized - Cost Benefit Review											
Albertsons - ANALGESICS											
Promotion	Base Est \$ O	Incr Est \$ O	Ttl Est \$ O	Mfg Prft O	Incr Mfg Prft O	Rtl Prft O	Incr Rtl Prft O	Est Spend q, CPM O	% Spend O		
April End Special	\$16,802	\$26,262	\$102,604	\$39,509	\$31,301	\$14,137	\$7,667	\$12,300	\$0.62	12%	

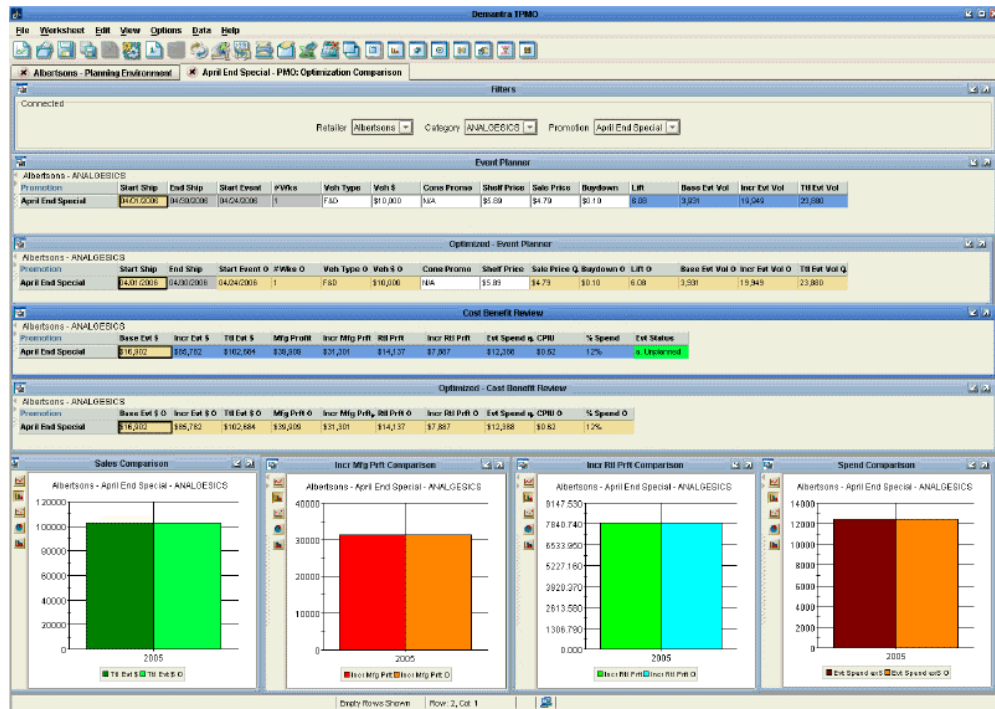
The incremental profit is higher, and the cost per incremental unit and the % spend are both lower.

The optimized version is suitable, so we will accept it.

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

PTP displays a message asking if you want to rerun the worksheet.

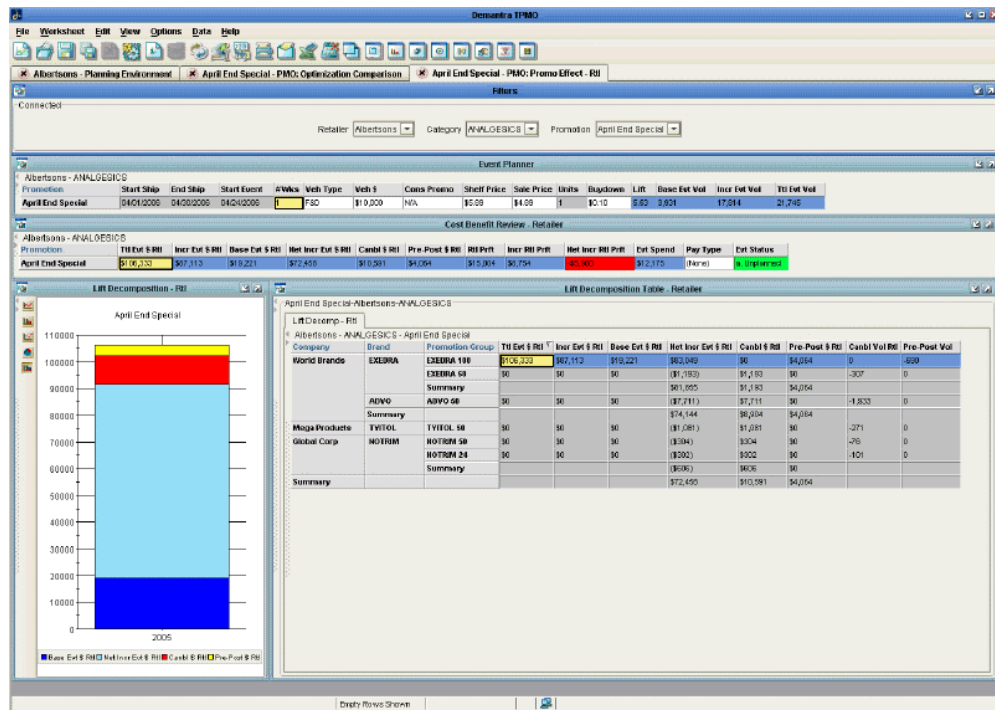
31. Click OK.



Now the attributes of the optimized promotion are copied into the original promotion. Notice the following:

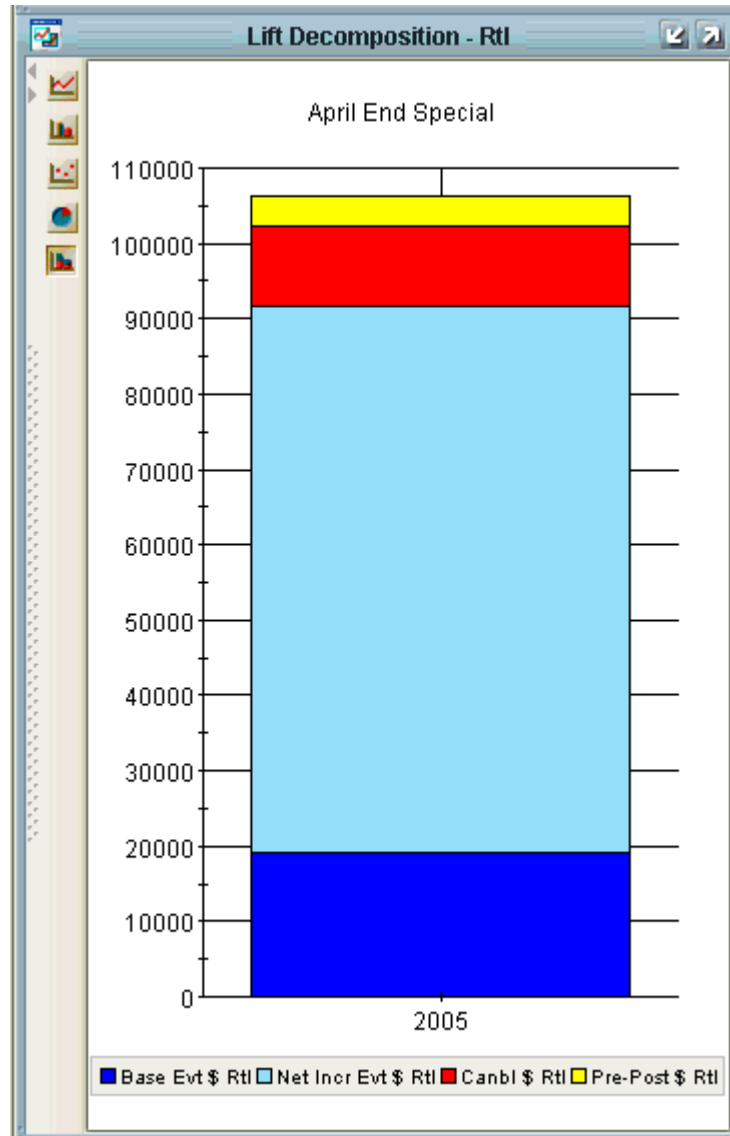
- The Event Planner and Optimized Event Planner windows both show the same values.
- The Cost Benefit Review and Optimized - Cost Benefit Review windows both show the same values.

- In each graph, both bars are the same height.
  - Also notice that the *color* of the Evt Status series changes to green, to indicate that optimization has been accepted.
32. For this example, we would prefer to reduce the price by an even dollar, so we change the sale price to 4.89 and save the change.
- We now should resimulate the promotion, to see how the sale price affects the forecast.
33. Click Data > Run Simulation. Or click the Simulation button.
1. Click Selected Combination.
  2. For Select Engine Profile, click Simulation.
  3. Click OK.
  4. When the simulation is complete, Demantra displays a message. We do not need to rerun this worksheet, because now we are interested in seeing the retailer's point of view, which we see in another worksheet.
34. Right-click the promotion and click Open With > PMO: Promo Effect - Rtl.
- The system displays the following:



Here we are looking at the same event from the point of view of the retailer. Notice the following:

First, the graph decomposes the net lift for the April End Special promotion.



- Base Evt \$ Rtl is the base money earned by the retailer over the course of the promotion. This money would have been earned even without the promotion.
- Net Incr Evt \$ Rtl is the net additional money earned by the retailer as a result of the promotion; this accounts for both cannibalization and pre- and post-effects.
- Canbl \$ Rtl is the money lost by the retailer 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 \$ Rtl is the money lost by the retailer 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 retailer would receive in sales, *if cannibalization and pre- and post-effects were ignored*.

Next, the Lift Decomposition Table - Retailer area show cannibalization effects, as the retailer sees them. The highlighted row shows where our promotion is running. Here you can see the effects on other promoted groups, and you can see the effects summarized by brand and manufacturer.

Lift Decomposition Table - Retailer										
April End Special-Albertsons-ANALGESICS										
Lift Decom - Rtl										
Albertsons - ANALGESICS - April End Special										
Company	Brand	Promotion Group	Ttl Est \$ Rtl	Incr Est \$ Rtl	Base Est \$ Rtl	Net Incr Est \$ Rtl	Cnbl \$ Rtl	Pre-Post \$ Rtl	Cnbl Vol Rtl	Pre-Post Vol
World Brands	EXEDRA	EXEDRA 100	\$106,333	\$87,113	\$10,221	\$83,040	\$0	\$4,064	0	-600
	EXEDRA	EXEDRA 50	\$0	\$0	\$0	(\$1,193)	\$1,193	\$0	-307	0
	ADVO	ADVO 50	\$0	\$0	\$0	(\$7,711)	\$7,711	\$0	-1,933	0
	Summary					\$74,144	\$8,904	\$4,064		
Mcge Products	TYTOL	TYTOL 50	\$0	\$0	\$0	(\$1,031)	\$1,031	\$0	-271	0
Global Corp	NOTRUM	NOTRUM 50	\$0	\$0	\$0	(\$304)	\$304	\$0	-76	0
	NOTRUM	NOTRUM 24	\$0	\$0	\$0	(\$302)	\$302	\$0	-101	0
Summary						\$72,468	\$10,601	\$4,064		

- In the Cost Benefit Review window, the red color for Net Incr Rtl Prft alerts us to the fact that this promotion currently does not make any money for the retailer. Net Incr Rtl Prft considers pre- and post-promotional effects and cannibalization, which together make this promotion unprofitable for the retailer.

Because this promotion is currently unprofitable for the retailer, we could increase the buydown to make it more attractive to the retailer.

### 35. Change Buydown to 0.60.

Notice that the Net Incr Rtl Prft is now positive:

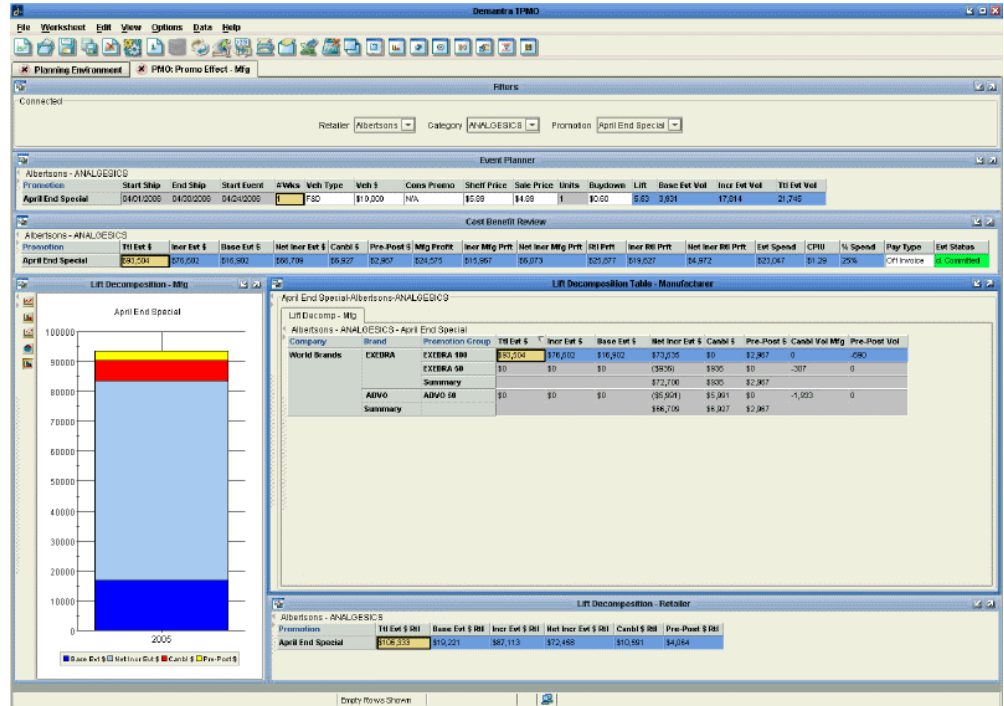
Cost Benefit Review - Retailer										
Albertsons - ANALGESICS										
Promotion	Ttl Est \$ Rtl	Incr Est \$ Rtl	Base Est \$ Rtl	Net Incr Est \$ Rtl	Cnbl \$ Rtl	Pre-Post \$ Rtl	Rtl Prft	Incr Rtl Prft	Net Incr Rtl Prft	Est Spend
April End Special	\$106,333	\$87,113	\$10,221	\$72,468	\$10,601	\$4,064	\$15,004	\$8,754	\$6,250	\$12,175
										(None)
										Is Unprofitable

### 36. Save the change.

Now we should re-examine the promotion from the manufacturer's point of view.

### 37. Right-click the promotion and click Open With > PMO: Promo Effect - Mfg.

The system displays the following:



Notice the following:

- The Cost Benefit Review and Lift Decomposition Table - Manufacturer tables show numbers from the point of view of the manufacturer, rather than the retailer.
- Because consuming sales of the products of other manufacturers is good in this case, that effect is not considered cannibalization and is not shown in the manufacturer's breakouts.
- The graph shows a different breakdown than was displayed for the retailer. The breakdown is different for two reasons. First, the manufacturer has a different definition of cannibalization, as just noted. Second, the cost basis is different for the manufacturer.
- The bottom of the screen shows a summary of the retailer information, for convenience.
- We could have come directly to this screen, bypassing the PMO: Promo Effect - Rtl worksheet. The benefit of the PMO: Promo Effect - Rtl worksheet is that it displays *only* the retailer information, so it is suitable for displaying directly to the retailer.

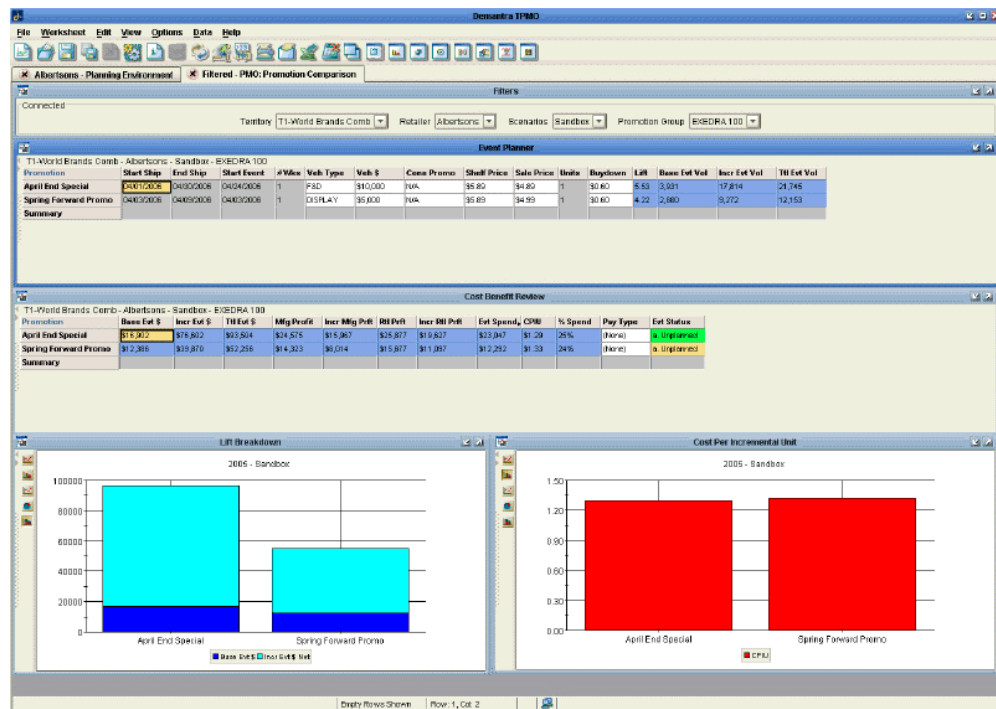
Notice that for the manufacturer, the net incremental profit is still positive, even though the event spending has been increased.

Before we add this promotion to the plan, we might decide to compare it side by side with another promotion.

38. Return to the Planning Environment worksheet and rerun this worksheet.

39. Right-click the Sandbox and click Open.

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



Here we have a side-by-side look at the two unplanned promotions in the Sandbox. The CPIU is similar in both of these, but April End Special makes more money.

At this point, we may have examined this promotion enough to want to add it to the plan. We would also need to specify how to fund it.

40. Return to thePlanning Environment worksheet.
41. In the Fund Allocation window, set MDF Alloc % equal to 85 for April End Special. This means that for 85% of the funding for this promotion will be taken from the total MDF fund. The remaining 15% will be taken from the BDF fund.

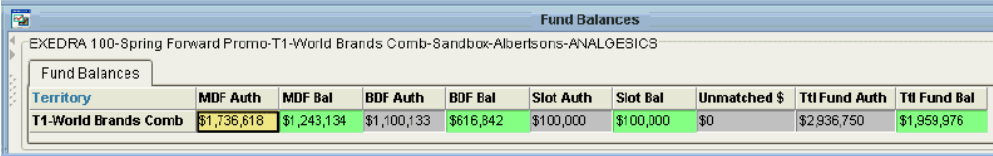
Notice that the Fund Balances window is not yet changed, because this promotion is still unplanned.

42. In the Event Planner area, change Evt Status to Planned.
43. Save the change.



44. Click on another promotion. This causes the embedded worksheets to be refreshed.

Because the promotion is now planned, the cost of the promotion is subtracted from the funds, as specified, and the promotional volume is added to the plans. The Fund Balances window shows the result:



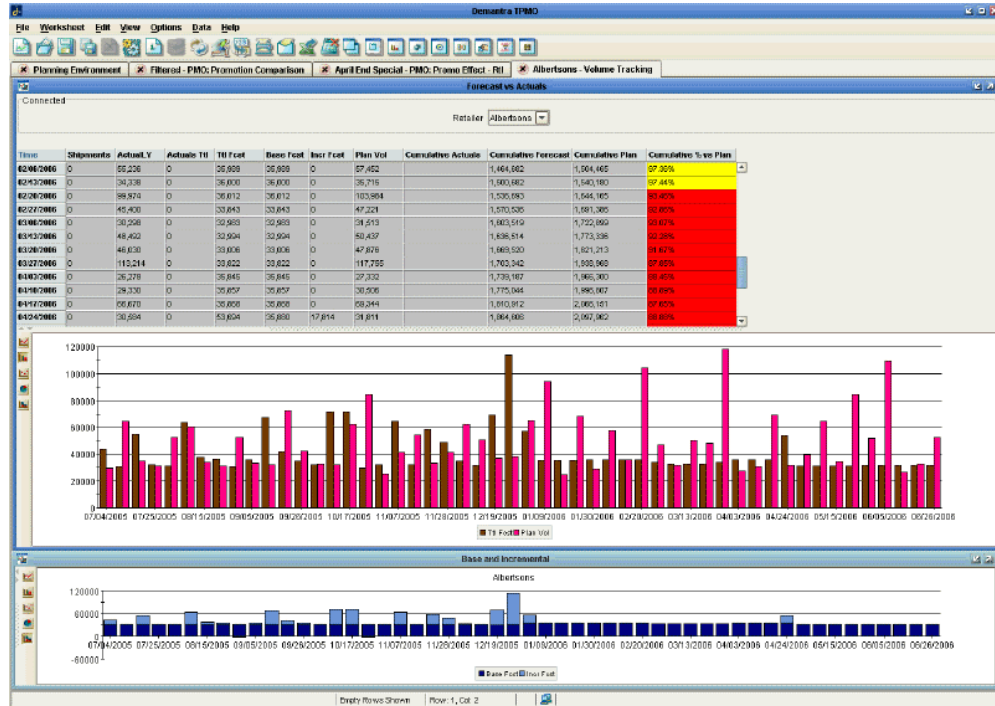
Territory	MDF Auth	MDF Bal	BDF Auth	BDF Bal	Slot Auth	Slot Bal	Unmatched \$	Ttl Fund Auth	Ttl Fund Bal
T1-World Brands Comb	\$1,736,618	\$1,243,134	\$1,100,133	\$616,842	\$100,000	\$100,000	\$0	\$2,936,750	\$1,959,976

The authorized funding was increased, because the volume was increased, and that partly counteracts the cost of the promotion:

- The Ttl Fund Auth increased from \$2,931,050 to \$2,936,750, an increase of \$5700.
- The event itself costs \$23,047.
- The fund balance should be decreased by \$17347, which is \$23,047 less \$5700. If you compare Ttl Fund Bal before and after, you will see that this is the precise difference.

Also, the Sales % vs. Quota window shows the increase in revenue.

45. Optionally, to see the increase in volume, use the Volume Tracking worksheet. To do this, return to the Collaborator Workbench. In My Worksheets, click Volume Tracking.
46. Click Albertson's at the top of the screen.



Notice the slight spike in volume at the time we planned for the April End Special promotion.

At this point, the Sales1 user might need to send this promotion to the manager for approval. To approve the promotion, the manager would simply change the Evt Status to Approved.

The next phase would be to meet with the retailer and negotiate an agreement on this promotion, before committing the promotion. See the next section.

## PMO: Committing a Promotion

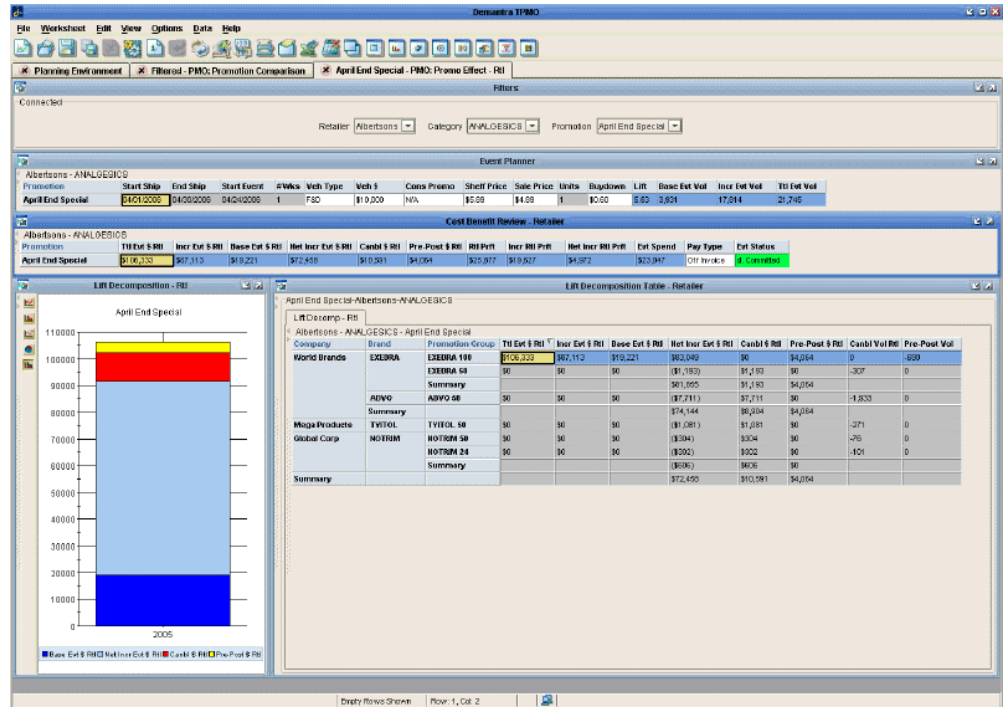
At some point, the sales representative would meet with the retailer, finalize the details of the promotion, and set the pay type for the promotion. The sales representative could show the PMO: Promo Effect - Rtl, showing the cost benefit details to the retailer, make any last changes, and resimulate to update the forecast.

When the sales representative receives a firm commitment to run this promotion, he or she commits the promotion.

1. In the Planning Environment worksheet, right-click the promotion and click Open With > PMO: Promo Effect - Rtl.
2. Change the Pay Type to Off Invoice.

**Note:** This change does not affect the forecast. If we had made a change that affects the forecast, we would need to rerun simulation to get the most current forecast for the promotion.

### 3. Change the Evt Status to Committed.



### 4. Save the changes.

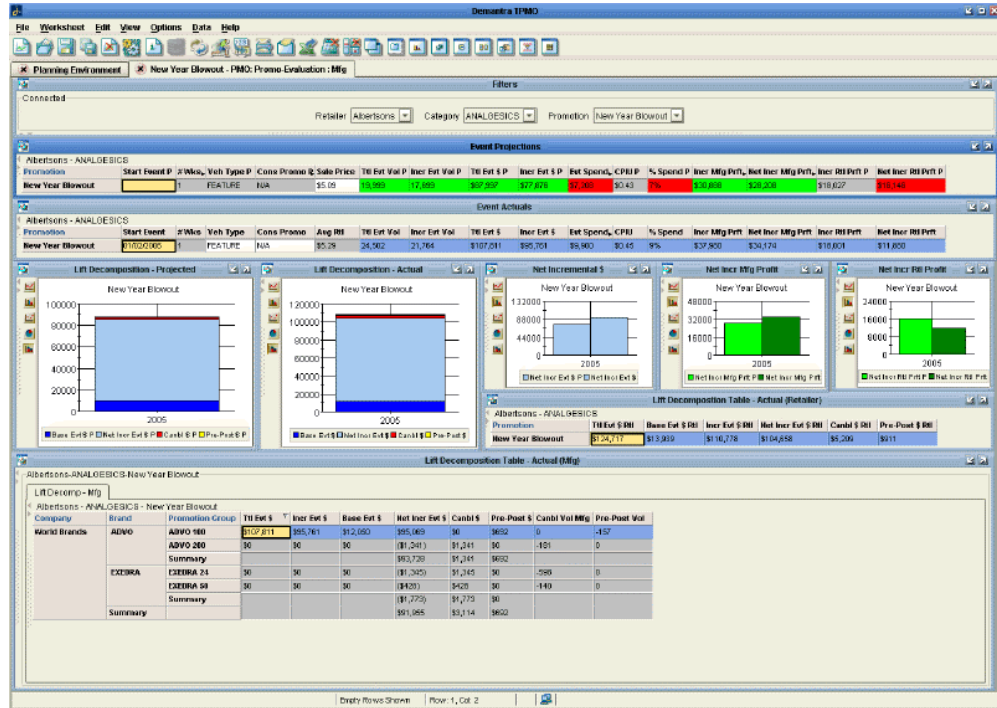
Now PTP takes a snapshot of the planned details of this promotion, creating projections that can be compared later with the actuals.

## PMO: Examining Past Promotions

To understand how PTP uses projections, we will examine a past promotion and see the actuals along with those projections.

1. In the Planning Environment worksheet, click the Advo 100 promotion group.
2. Right-click the New Year Blowout promotion and click Open With > PMO: Promo-Evaluation: Mfg.

The following screen appears:



Notice the color coding used here 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.

A similar worksheet (PMO: Promo-Evaluation: Rtl) is available if we want to examine the actuals from the point of view of the retailer.

It is often useful to review actuals and see average information for different kinds of promotions. PTP provides a worksheet where you can examine the past averages for each promotion type.

3. Click File > Open.
4. Select PMO: Promotion History and then click Open.

The worksheet is displayed as follows:

Worksheet: Demo: a TPMD

File Worksheet Edit View Options Data Help

Planning Environment April End Special - PMO: Optimization Comparison PMO: Promotion History

Connected

Retailer: Albertsons Category: ANALOGES

Promotion Type	Avg Rtl	Avg % Disc	Avg D Desc	Avg Ttl Evt Vol	Avg Incr Evt Vol	Avg Ltt	Avg Ttl Evt S	Avg Incr Evt S	Avg Mfg Pft	Avg Incr Mfg Pft	Avg Rtl Pft	Avg Incr Rtl Pft	Avg Rtl Margin	Avg Evt Spend	Avg CPB	Avg % Spend
FEATURE	\$4.89	12%	\$0.25	21,909	17,713	3.25	\$67,212	\$54,090	\$27,478	\$36,147	\$16,096	\$11,058	24%	\$7,363	\$0.54	11%
F. SMOOTHER	\$5.17	14%	\$0.26	11,551	8,251	3.58	\$35,558	\$26,236	\$15,027	\$16,367	\$7,261	\$5,382	23%	\$3,385	\$0.31	14%
FAO	\$3.54	17%	\$0.37	41,259	36,449	9.53	\$126,744	\$110,080	\$48,416	\$46,832	\$24,085	\$19,586	23%	\$17,336	\$0.58	18%
DISPLAY	\$3.35	14%	\$0.25	19,370	13,130	3.10	\$58,078	\$40,046	\$25,030	\$19,047	\$16,053	\$5,412	20%	\$6,092	\$0.48	10%
TPR	\$4.25	0%	\$0.17	21,182	16,154	4.27	\$67,726	\$52,220	\$26,420	\$26,022	\$24,016	\$26,016	30%	\$4,550	\$0.27	7%
Summary	\$4.49	9%	\$0.25	22,379	17,804	4.05	\$68,190	\$54,724	\$27,099	\$26,016	\$17,106	\$12,036	26%	\$7,249	\$0.54	10%

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.



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## PTP Reference

This chapter covers the following topics:

- Series
- Item Levels
- Location Levels
- Retailer
- Promotion Levels
- Lookup Tables
- Methods
- Procedures
- Triggers
- Workflows
- Engine Configuration

### Series

This chapter provides reference information for PTP series, levels, methods, and so on.

PTP provides the following series:

Series	Table	Purpose	For details, see...
# Wks	promotion	Event length in weeks, assuming that each week starts on Monday. Always rounded up to a whole number of weeks.	

Series	Table	Purpose	For details, see...
# Wks O	promotion_level	Event length in weeks, for optimized promotion.	"Optimizing a Promotion"
# Wks P	promotion_level	<p>Projected event length in weeks, as predicted when the promotion was committed.</p> <p>This series is configured (via a client expression) to have three branches, as follows:</p> <ul style="list-style-type: none"> <li>• If the value of this series is not null, that means Demantra has captured projections for this promotion. So use that value.</li> <li>• If the value is null and if the promotion is Committed, use the value # Wks.</li> <li>• If the value is null and if the promotion is not Committed, use null.</li> </ul>	"Event Projections and Event Actuals"
\$ Sales	sales_data	Annual dollar sales.	
\$ Sales Proj	sales_data	Planned sales dollars: actuals (for past dates) plus forecast (for future dates)	
% ACV ANY PROMO	sales_data	Measures the number of stores that ran any promotion, weighted by store size. Loaded from syndicated data.	
% ACV DISP	sales_data	Measures the number of stores that ran displays, weighted by store size. Loaded from syndicated data.	
% ACV FEAT	sales_data	Measures the number of stores that ran features, weighted by store size. Loaded from syndicated data.	



Series	Table	Purpose	For details, see...
% ACV FEAT&DISPLA Y	sales_data	Measures the number of stores that ran combined features and displays, weighted by store size. Loaded from syndicated data.	
% ACV FREQSHOPPE R	sales_data	Measures the number of stores that ran frequent shopper specials, weighted by store size. Loaded from syndicated data.	
% ACV TPR	sales_data	Measures the number of stores that ran temporary price reductions, weighted by store size. Loaded from syndicated data.	
% Attained	sales_data	Percentage of sales quota attained.	"Sales % vs. Quota"
% Spend	promotion	Event spending (vehicle and buydown), as a percentage of event sales. This is a useful metric of the effectiveness of a promotion; the lower this number, the better.	"Cost Benefit Review"
% Spend O	promotion	Event spending (vehicle and buydown), as a percentage of event sales, for the optimized promotion..	"Optimizing a Promotion"

Series	Table	Purpose	For details, see...
% Spend P	promotion	<p>Projected event spending (vehicle and buy down), as a percentage of event sales, as predicted when the promotion was committed.</p> <p>PTP uses colors to indicate deviations between the projections and the actuals:</p> <ul style="list-style-type: none"> <li>• If the actual value is more than 20% different from the projection in the undesirable sense, the projection is shown in red.</li> <li>• 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.</li> </ul> <p>This series is configured (via a client expression) to have three branches, in the same way as # Wks P.</p>	"Event Projections and Event Actuals"
ActualLY	sales_data	Actual demand one year ago.	
Actuals Base	sales_data	Base number of units sold in the past, if there had been no promotions. Loaded from syndicated data.	
Actuals Incr	sales_data	Incremental number of units sold in the past, due to promotions. Loaded from syndicated data.	
Actuals LY	sales_data	Actual demand one year ago.	
Actuals Ttl	sales_data	Total number of units sold in the past. This includes both base and incremental volume. Loaded from syndicated data.	"About Quotas and Funds"
Avg % Disc	promotion	Average percent discount	"Viewing Actual Averages"

<b>Series</b>	<b>Table</b>	<b>Purpose</b>	<b>For details, see...</b>
Avg % Spend	promotion	Average percent spend	
Avg B Dwn	promotion	Average buy down for the event	
Avg CPIU	promotion	Average cost per incremental unit	
Avg Evt Spend	promotion	Average weekly event spend	"Viewing Actual Averages"
Avg Inc Rtl Prft	promotion	Average weekly incremental retailer profit	
Avg Incr Evt \$	promotion	Average weekly incremental event dollars for manufacturer	
Avg Incr Evt Vol	promotion	Average weekly incremental event volume	
Avg Incr Mfg Prft	promotion	Average weekly incremental manufacturer profit	
Avg Lift	promotion	Average lift factor for promotion	
Avg Mfg Prft	promotion	Average weekly manufacturer profit	
Avg Rtl	promotion	Average unit retail price at shelf. Loaded from syndicated data.	
Avg Rtl Margin	promotion	Average retailer event margin	
Avg Rtl Prft	promotion	Average weekly retailer profit	
Avg Rtl sd	sales_data	Average unit retail price at shelf. Loaded from syndicated data.	
Avg Ttl Evt Vol	sales_data	Average weekly total event volume	"Viewing Actual Averages"
Base Evt \$	promotion	Base sales for the manufacturer, during the promotion.	"Lift Decomposition Table - Manufacturer"

Series	Table	Purpose	For details, see...
Base Evt \$ O	promotion	Base sales for the manufacturer, during the optimized promotion.	"Optimizing a Promotion"
Base Evt \$ P		Projected base sales for the manufacturer, during the promotion.	
Base Evt \$ Rtl	promotion	Base sales for the retailer, during the promotion.	"Lift Decomposition Table - Retailer"
Base Evt \$ Rtl Act	promotion	Base event dollars from a retailer's perspective, as determined by syndicated data.	
Base Evt \$ Rtl P	promotion	Projected base sales for the retailer, during the promotion.	
Base Evt \$ Rtl sd	sales_data	Base event dollars earned by the retailer, as loaded from external systems. By default, this series displays loaded syndicated data.	
Base Evt Vol	promotion	Baseline volume during the promotion.	
Base Evt Vol O	promotion	Baseline volume during the optimized promotion.	"Optimizing a Promotion"
Base Fcst	sales_data	Base volume: actuals (for past dates) plus forecast (for future dates).	
BDF Auth	sales_data	Authorized brand development funds, calculated as follows: (base rate + dev rate) * volume + fixed BDF funds	"About Quotas and Funds"
BDF Alloc	promotion	Allocated brand development funds, based on the percentage set by the planner	"Marking a Promotion as Planned"

Series	Table	Purpose	For details, see...
BDF Alloc %	promotion	Read-only series that indicates how much of event spending (apart from slotting costs) is to be allocated to BDF.  Note that BDF Alloc % + MDF Alloc % = 100%	
BDF Auth	sales_data	Authorized brand development fund, calculated as follows:  (base rate + dev rate) * volume + fixed funds	"About Quotas and Funds"
BDF Bal	sales_data	Remaining (unspent) BDF funds, computed as follows:  BDF Auth - BDF Alloc	
BDF Base Rate	sales_data	Brand Development Fund Base rate -- displayed to the user in the field.	
BDF Dev Rate	sales_data	Brand Development Fund Development rate, entered by corporate HQ.	
BDF Fixed Funds	sales_data	BDF fixed funds	
Buydown	promotion	Buydown allowance or discount per promoted unit that will be paid to the retailer. May be used for either off-invoice or bill back.	"Promotion Costs and Spending"
Buydown \$	promotion	Buy down spend for the promotion, computed as the buy down allowance multiplied by the volume.	
Buydown O	promotion	Buy down spend for the optimized promotion.	"Optimizing a Promotion"
Can Vol Dir			

Series	Table	Purpose	For details, see...
Canbl \$	promotion	Cannibalization dollars for the manufacturer. This considers volume that has been cannibalized from other products.	"Lift Decomposition Table - Manufacturer"
Canbl \$ P	promotion	Projected cannibalization dollars for the manufacturer.	
Canbl \$ Rtl	promotion	Cannibalization dollars for the retailer. This considers volume that has been cannibalized from other products and from other stores of this retailer.	"Lift Decomposition Table - Retailer"
Canbl \$ Rtl P	promotion	Projected cannibalization dollars for the retailer.	
Canbl Vol Mfg	promotion	Cannibalization volume for the manufacturer,	
Canbl Vol Other	promotion	<p>Cannibalization of sales at other stores, as a result of the promotion. This is a negative number that indicates how many fewer units were sold. To the retailer, this is an undesirable effect. To the manufacturer, this effect is neutral, because the manufacturer cares only about net volume.</p> <p>(In Promotion Effectiveness terminology, this is the so-called "store switching" effect.)</p>	
Canbl Vol Own	promotion	<p>Cannibalization of sales of other products by the same manufacturer, as a result of the promotion. This is a negative number that indicates how many fewer units were sold.</p> <p>(In Promotion Effectiveness terminology, this is the so-called "product switching" effect.)</p>	

<b>Series</b>	<b>Table</b>	<b>Purpose</b>	<b>For details, see...</b>
Canbl Vol Rtl	promotion	<p>Cannibalization volume for the retailer.</p> <p>This is the sum of Canbl Vol Other and Canbl Vol Own, both of which are undesirable to the retailer.</p>	
COGS	promotion	Cost of goods, as paid by the manufacturer.	
COGS sd	sales_data	Cost of goods, as paid by the manufacturer.	
Cons Promo	promotion level	<p>Consumer overlay, the deal type as seen by the consumer. For example, buy-1-get-1-free. Controls the number of units in the deal and affects the volume.</p> <p>Uses the Cons_type lookup table; see "Lookup Tables".</p>	
Cons Promo P	promotion level	<p>Projected consumer overlay, the deal type as seen by the consumer, as predicted when the promotion was committed.</p> <p>This is shown in red if the actual deal type was different.</p> <p>This series is configured (via a client expression) to have three branches, in the same way as # Wks P.</p> <p>Uses the Cons_type lookup table; see "Lookup Tables".</p>	"Event Projections and Event Actuals"
CPIU	promotion	Cost per incremental unit sold as a result of the promotion.	
CPIU O	promotion	Cost per incremental unit sold as a result of the optimized promotion.	"Optimizing a Promotion"

Series	Table	Purpose	For details, see...
CPIU P	promotion	<p>Projected cost per incremental unit sold as a result of the promotion, as predicted when the promotion was committed.</p> <p>PTP uses colors to indicate deviations between the projections and the actuals; see "% Spend P".</p> <p>This series is configured (via a client expression) to have three branches, in the same way as # Wks P.</p>	"Event Projections and Event Actuals"
Cumulative % vs Plan	sales_data	Total cumulative actuals, as a fraction of the plan.	
Cumulative Actuals	sales_data	The total actuals (base plus incremental) cumulative to date.	
Cumulative Plan	sales_data	Cumulative frozen planned volume.	
End Ship	promotion level	Date when shipments will end for the event	"Creating a Promotion"
Evt Spend	promotion	Total plan spend (by the manufacturer) for the promotion, sum of buy down, vehicle costs, and slotting.	
Evt Spend exS	promotion	<p>Total planned buy down and vehicle costs for promotion.</p> <p>This spend is split between MDF and BDF funds. To control the split, you set the MDF Alloc % series, which controls how much of the spending is funded by MDF.</p>	
Evt Spend exS O	promotion	Total planned buy down and vehicle costs for optimized promotion.	"Optimizing a Promotion"



Series	Table	Purpose	For details, see...
Evt Spend exS P	promotion	<p>Projected total planned buy down and vehicle costs for promotion, as predicted when the promotion was committed.</p> <p>PTP uses colors to indicate deviations between the projections and the actuals; see "% Spend P".</p> <p>This series is configured (via a client expression) to have three branches, in the same way as # Wks P.</p>	"Event Projections and Event Actuals"
Evt Status	promotion level	<p>Status of the promotion as shown to users. For allowed values, see "Promotion Status".</p> <p>Also, the color of this series indicates the optimization status of this promotion:</p> <ul style="list-style-type: none"> <li>• Yellow means that the promotion has been optimized.</li> <li>• Green means that the promotion has been optimized and accepted, so that the promotion is using the optimization results.</li> <li>• White means that the promotion has not been optimized.</li> </ul>	
Incr Evt \$	promotion	Incremental sales to the manufacturer due to the promotion.	"Lift Decomposition Table - Manufacturer"
Incr Evt \$ Net	promotion	Net incremental sales due to the event.	
Incr Evt \$ O	promotion	Incremental sales to the manufacturer due to the optimized promotion.	"Optimizing a Promotion"

Series	Table	Purpose	For details, see...
Incr Evt \$ P	promotion	<p>Projected incremental sales to the manufacturer, due to the event, as predicted when the promotion was committed.</p> <p>PTP uses colors to indicate deviations between the projections and the actuals; see "% Spend P".</p> <p>This series is configured (via a client expression) to have three branches, in the same way as # Wks P.</p>	"Event Projections and Event Actuals"
Incr Evt \$ Rtl	promotion	Incremental sales to the retailer due to the promotion.	"Lift Decomposition Table - Retailer"
Incr Evt \$ Rtl Act	promotion	Incremental sales to the retailer due to the promotion, as determined by syndicated data.	
Incr Evt \$ Rtl sd	sales_data	Incremental event dollars earned by the retailer, as loaded from external systems. By default, this series displays loaded syndicated data.	
Incr Evt Vol	promotion	Incremental volume due to the promotion.	
Incr Evt Vol Act	promotion	Incremental volume due to the promotion, as determined by syndicated data.	
Incr Evt Vol Fut	promotion	Incremental volume due to the promotion. This series has values for all dates (not just future dates).	
Incr Evt Vol O	promotion	Incremental volume due to the optimized promotion.	"Optimizing a Promotion"

Series	Table	Purpose	For details, see...
Incr Evt Vol P	promotion	<p>Projected incremental volume due to the promotion, as predicted when the promotion was committed.</p> <p>PTP uses colors to indicate deviations between the projections and the actuals; see "% Spend P".</p> <p>This series is configured (via a client expression) to have three branches, in the same way as # Wks P.</p>	"Event Projections and Event Actuals"
Incr Evt Vol sd	sales_data	Incremental event volume, as loaded from syndicated data.	
Incr Fcst	sales_data	Incremental volume: actuals and forecast due only to planned promotions.	
Incr Mfg Prft	promotion	<p>Incremental profit to the manufacturer due to the promotion. Event spending and slotting have been deducted.</p> <p>This profit is in addition to the manufacturer's usual profit and is thus a measure of the value of the promotion.</p> <p>This series is displayed in red if the value is negative.</p>	
Incr Mfg Prft O	promotion	<p>Incremental profit to the manufacturer due to the optimized promotion.</p> <p>This series is displayed in red if the value is negative.</p>	"Optimizing a Promotion"

Series	Table	Purpose	For details, see...
Incr Mfg Prft P	promotion	<p>Projected incremental profit to the manufacturer due to the promotion, as predicted when the promotion was committed.</p> <p>PTP uses colors to indicate deviations between the projections and the actuals; see "% Spend P".</p> <p>This series is configured (via a client expression) to have three branches, in the same way as # Wks P.</p>	"Event Projections and Event Actuals"
Incr Rtl Prft	promotion	<p>Incremental retailer profit due to the promotion, calculated as the incremental volume multiplied by the retailer's margin.</p> <p>This profit is in addition to the retailer's usual profit and is thus a measure of the value of the promotion to the retailer.</p> <p>This series is displayed in red if the value is negative.</p>	
Incr Rtl Prft O	promotion	<p>Incremental retailer profit due to the optimized promotion.</p> <p>This series is displayed in red if the value is negative.</p>	"Optimizing a Promotion"
Incr Rtl Prft P	promotion	<p>Projected incremental retailer profit due to the promotion, as predicted when the promotion was committed.</p> <p>PTP uses colors to indicate deviations between the projections and the actuals; see "% Spend P".</p> <p>This series is configured (via a client expression) to have three branches, in the same way as # Wks P.</p>	"Event Projections and Event Actuals"
incr_vol_no_un plan	promotion	Incremental volume caused only by the planned promotions.	

Series	Table	Purpose	For details, see...
Is_self	promotion	<p>For internal use only. This series indicates whether the promotion and the item-location combination are related:</p> <ul style="list-style-type: none"> <li>• 1 means that the promotion applies to the item-location combination.</li> <li>• 0 means that the promotion applies to some other item-location combination.</li> </ul>	
Lift	promotion	Lift factor for the promotion. This is the event volume divided by the base volume.	
Lift O	promotion	Lift factor for the optimized promotion.	"Optimizing a Promotion"
List Price	promotion	List price, the price charged by the manufacturer to the retailer.	
List Price sd	sales_data	List price, the price charged by the manufacturer to the retailer.	
MDF Auth	sales_data	<p>Authorized market development fund, computed as follows:</p> <p><math>(\text{base rate} + \text{dev rate}) * \text{volume} + \text{fixed funds}</math></p>	
MDF Alloc	promotion	<p>MDF spending that is allocated to fund this event. This is computed as follows:</p> <p><math>\text{MDF Alloc \%} * \text{Evt Spend exS}</math></p>	"Marking a Promotion as Planned"

Series	Table	Purpose	For details, see...
MDF Alloc %	promotion	<p>Editable series that controls how much of event spending (apart from slotting costs) is to be allocated to MDF.</p> <p>Note that BDF Alloc % + MDF Alloc % = 100%</p> <p>Enter 50 for 50%, for example.</p>	
MDF Auth	sales_data	<p>Authorized market development fund, computed as follows:</p> <p>(base rate + dev rate) * volume + fixed funds</p>	"About Quotas and Funds"
MDF Bal	sales_data	<p>Remaining (unspent) MDF funds, computed as follows:</p> <p>MDF Auth - MDF Alloc</p>	
MDF Base Rate	sales_data	Market development fund base rate.	"About Quotas and Funds"
MDF Dev Rate	sales_data	Market development fund development rate.	
MDF Fixed Funds	sales_data	MDF fixed funds.	
Mfg Prft O	promotion	<p>Manufacturer's profit from the optimized event.</p> <p>This series is displayed in red if the value is negative.</p>	
Mfg Profit	promotion	<p>Manufacturer's profit from the event, considering both cost of goods and event spending.</p> <p>This series is displayed in red if the value is negative.</p>	
Mfg Profit Var	promotion		

Series	Table	Purpose	For details, see...
Net Incr Evt \$	promotion	Net revenue from the manufacturer's perspective. This considers the total manufacturer's lift dollars and subtracts costs due to cannibalization and pre- and post-effects.	"Lift Decomposition Table - Manufacturer"
Net Incr Evt \$ Rtl	promotion	Net revenue from a retailer's perspective. This considers the total retailer's lift dollars and subtracts costs due to cannibalization (as seen by the retailer) and pre- and post-effects.	"Lift Decomposition Table - Retailer"
Net Incr Rtl Prft	promotion	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects.	
Optimization Status	promotion level	Indicates the status of any optimization that was run on this promotion. Used in the color expression of the Evt Status series. Not meant for direct use.	
Optimized	promotion	For internal use only. Indicates if optimization was run on this promotion.	

Series	Table	Purpose	For details, see...
Past End Date	promotion level	<p>Not displayed. This internal series is used to check whether a promotion has already occurred. For any promotion, this series equals one of the following values:</p> <ul style="list-style-type: none"> <li>1 means that the promotion is past; specifically, the max_sales_date is equal to or after the end date of the promotion.</li> <li>0 means that the promotion is in the future.</li> </ul> <p>Other series use this series within client expressions that have the following general logic:</p> <p>if past end date = 1, use actuals data; otherwise, use forecast data.</p>	
Pay Type	promotion	Type of settlement arranged with the retailer for this promotion. Indicates the payment terms between the manufacturer and the retailer for this promotion.	
Plan Vol	sales_data	Manufacturer's planned revenue.	
Pre-Post \$	promotion	Total sales made by the manufacturer before and after the promotion, as a result of the promotion. This is shown as a positive number for graphing purposes. These sales, however, are subtracted from the total sales.	"Lift Decomposition Table - Manufacturer"
Pre-Post \$ Rtl	promotion	Total sales made by the retailer before and after the promotion, as a result of the promotion. This is shown as a positive number for graphing purposes. These sales, however, are subtracted from the total sales.	"Lift Decomposition Table - Retailer"



Series	Table	Purpose	For details, see...
Pre-Post Vol	promotion	Total volume before and after the promotion, as a result of the promotion. This is generally a negative number.	"Lift Decomposition Table - Manufacturer"
Rtl Prft	promotion	Retailer's profit from the event.  This series is displayed in red if the value is negative.	
Rtl Prft O	promotion	Retailer's profit from the optimized event.  This series is displayed in red if the value is negative.	"Optimizing a Promotion"
Sale Price	promotion	Sale price per unit at shelf.	
Sale Price O	promotion level	Sale price per unit at shelf, for the optimized promotion.	
Sales Quota	sales_data	Sales quota (revenue).	
Sales Quota	sales_data	Sales quota (revenue).	
Sales Var	promotion		
Shelf Price	promotion	Everyday price to the consumer.  In contrast to the Shelf Price sd series, this series is stored in promotion_data for better performance.	
Shelf Price sd	sales_data	The everyday price to the consumer, as loaded from external systems. This series is stored in sales_data and is mainly for internal use; see Shelf Price.	
Shipments	sales_data	Number of units shipped from the manufacturer to the ship-to destination of the retailer.	

Series	Table	Purpose	For details, see...
Slot Auth	sales_data	Authorized slotting funds.	"About Quotas and Funds"
Slot Bal	sales_data	Remaining slotting budget.	
Start Event	promotion	Date when promotion starts in stores.	"Creating a Promotion"
Start Event O	promotion level	Date when optimized promotion starts in stores.	"Optimizing a Promotion"
Start Event P	promotion level	<p>Projected date when promotion starts in stores, as predicted when the promotion was committed.</p> <p>This series is configured (via a client expression) to have three branches, in the same way as # Wks P.</p>	"Event Projections and Event Actuals"
Start Ship	promotion level	Date when the product will start to be shipped	"Creating a Promotion"
Status	promotion level	For internal use only.	
Ttl Evt \$	promotion	Total revenue during the event, for the manufacturer.	
Ttl Evt \$ O	promotion	Total revenue during the optimized event, for the manufacturer.	"Optimizing a Promotion"
Ttl Evt \$ P	promotion	<p>Projected total revenue during the event, for the manufacturer, as predicted when the promotion was committed.</p> <p>PTP uses colors to indicate deviations between the projections and the actuals; see "% Spend P".</p> <p>This series is configured (via a client expression) to have three branches, in the same way as # Wks P.</p>	"Event Projections and Event Actuals"

Series	Table	Purpose	For details, see...
Ttl Evt \$ Rtl	promotion	Total revenue during the event, for the retailer.	
Ttl Evt Vol	promotion	Total volume for the promotion.	
Ttl Evt Vol O	promotion	Total volume for the optimized promotion.	"Optimizing a Promotion"
Ttl Evt Vol P	promotion	<p>Projected total event volume, as predicted when the promotion was committed.</p> <p>PTP uses colors to indicate deviations between the projections and the actuals; see "% Spend P".</p> <p>This series is configured (via a client expression) to have three branches, in the same way as # Wks P.</p>	"Event Projections and Event Actuals"
Ttl Fcst	sales_data	Total volume: base forecast plus incremental forecast.	
Ttl Fund Auth	promotion	Total authorized spending, including MDF, BDF, and slotting.	"About Quotas and Funds"
Ttl Fund Bal	promotion	Remainder of total authorized spending, after accounting for spending.	
Units	promotion_level	Number of units associated with the consumer deal (Cons Promo). Usually this is 1. This is 2 in the case of 2-for-1 deals.	
Unmatched \$	sales_data	Trade spend not yet matched to an event.	
Uplift	promotion_data		"About Quotas and Funds"
Veh \$	promotion	Vehicle cost for the promotion.	"Promotion Costs and Spending"

Series	Table	Purpose	For details, see...
Veh \$ O	promotion	Vehicle cost for the optimized promotion.	"Optimizing a Promotion"
Veh Type	promotion level	The vehicle type or event type of the promotion.	"Promotion Costs and Spending"
Veh Type O	promotion level	The vehicle type or event type of the optimized promotion.	"Optimizing a Promotion"
Veh Type P	promotion level	Projected vehicle type of the promotion, as predicted when the promotion was committed.  This series is configured (via a client expression) to have three branches, in the same way as # Wks P.	"Event Projections and Event Actuals"
Vehicle Cost DISPLAY	promotion	Vehicle cost for event of type DISPLAY.	
Vehicle Cost F&D	promotion	Vehicle cost for event of type F&D.	
Vehicle Cost F. SHOPPER	promotion	Vehicle cost for event of type F. SHOPPER.	
Vehicle Cost FEATURE	promotion	Vehicle cost for event of type FEATURE.	
Vehicle Cost NATIONAL TV	promotion	Vehicle cost for event of type NATIONAL TV.	
Vehicle Cost TPR	promotion	Vehicle cost for event of type TPR.	
Volume Base	sales_data	Base volume aggregated over sales data.	"About Quotas and Funds"

Series	Table	Purpose	For details, see...
Volume Base Ttl	sales_data	Base volume series used by many other series. This series gives the base volume, if no promotions were run or are run. It checks the value of Past End Date and uses the following logic.  If past end date = 1, use actuals data; otherwise, use forecast data.	
Volume Incr Ttl	promotion_data	Incremental volume series used by many other series. This series gives the incremental volume due to promotions. It checks the value of Past End Date and uses the following logic.  If past end date = 1, use actuals data; otherwise, use forecast data.	

## Item Levels

PTP uses the following item levels:



The most commonly used item level is Promotion Group. Some PTP worksheets use Brand or Segment. The other levels are provided for convenience, so that you can create worksheets aggregated at those levels.

The Manufacturer level is populated via the APPPROC\_MAINTAIN\_TERR\_RETAILER procedure. The rest are created by ep\_load\_main.

## Location Levels

PTP uses the following location levels:



The most commonly used location levels are Territory and Retailer. The Retailer has a set of attributes, described in the following subsection. The other levels are provided for convenience, so that you can create worksheets aggregated at those levels.

The Territory-Retailer level is used by the Analytical Engine. This level is populated via the APPPROC\_MAINTAIN\_TERR\_RETAILER procedure. The rest are created by ep\_load\_main.

Internally, the lowest location level is a combination of Ship To and Territory and is created automatically by Demantra.

## Retailer

This level contains the retailers. It is expected that retailers will be loaded rather than created within PTP. However, users can and should modify attributes of these retailers:

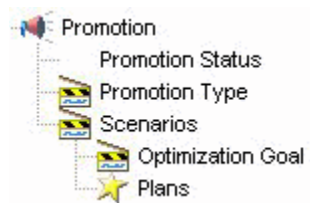
Attribute	Purpose
Account Classification	Dropdown list with the following choices: <ul style="list-style-type: none"><li>• Growth</li><li>• Holding</li><li>• Declining</li></ul>
Avg Everyday Selling Margin	Average selling margin, disregarding promotions.

Attribute	Purpose
Class_of_Trade	<p>Dropdown list with the following choices:</p> <ul style="list-style-type: none"> <li>• Food</li> <li>• Drug</li> <li>• Mass</li> <li>• C-Store</li> <li>• Military</li> </ul>
Event Threshold: Display Only	Minimum number of units that should be sold for an event of type Display.
Event Threshold: F Shopper	Minimum number of units that should be sold for an event of type F. Shopper.
Event Threshold: Feat Display	Minimum number of units that should be sold for an event of type F&D.
Event Threshold: Feature Only	Minimum number of units that should be sold for an event of type Feature.
Event Threshold: Natl TV	Minimum number of units that should be sold for an event of type National TV.
Event Threshold: TPR Only	Minimum number of units that should be sold for an event of type TPR.
Key Competitors	A text field where you can list the key competitors of this retailer.
Min Man Event Margin	
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.
Name	Name of the retailer.
Number of Active Stores	Number of active stores that this retailer operates.

Attribute	Purpose
Ship Timing: Display Stock #Wk	Specifies how much earlier this retailer likes to receive any items to be placed in display stock. Specify as the number of weeks needed before the start of the promotion.
Ship Timing: Displays # Wks	Specifies how much earlier this retailer likes to receive any displays to be placed in the stores. Specify as the number of weeks needed before the start of the promotion.
Ship Timing: Reg Open Stock Wks	Specifies how much earlier this retailer likes to receive any items to be placed in open stock. Specify as the number of weeks needed before the start of the promotion.
Slotting Fees per item	Amount that this retailer charges to place the items on the shelf, per item.
Use Default Profile	Controls whether to update this profile by getting the default values for all these attributes.
Veh Costs: Display Only	Default cost for an event of type Display for this retailer.
Veh Costs: F Shopper	Default cost for an event of type F. Shopper for this retailer.
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: Natl TV	Default cost for an event of type National TV for this retailer.
Veh Costs: TPR Only	Default cost for an event of type TPR for this retailer.

## Promotion Levels

PTP uses the following promotion levels:





The following sections provide details on these levels:

- "Promotion"
- "Promotion Status"
- "Promotion Type"
- "Scenarios"
- "Optimization Goal"
- "Plans"

## Promotion

This level contains the promotions. Users can add, modify, or remove promotions as needed. The following table lists all the attributes of promotions and indicates when these attributes are displayed:

Attribute	When Displayed	Purpose
Approval		
Buydown		Buy down allowance for this promotion. May be used for Off Invoice or Bill back purposes.
Cons Promo	When creating or editing	Consumer overlay. Indirectly specifies the number of units included in the deal to the customer.  Uses the Cons_type lookup table; see "Lookup Tables".
End Ship	When creating or editing	
Event Status	Not used.	Ignore this attribute. It is not used.
Fixed Buydown	When optimizing	Specifies whether Promotion Optimization should use the buydown that you have already entered or calculate an optimal buydown for this promotion.  Uses a lookup table that should not be edited.

Attribute	When Displayed	Purpose
Max Budget	When optimizing	Maximum allowed budget for this promotion.
Max Buydown	When optimizing	Maximum allowed buydown for this promotion. If Promotion Optimization calculates an optimal buydown, the buydown will not exceed this value.
method_status		Uses a lookup table that should not be edited.
Min Rtl Margin Override	When optimizing	<p>Minimum margin that the retailer must make on this promotion. By default, Promotion Optimization considers the retailer's default required minimum margin. Use this parameter to override that value, if needed.</p> <p>Use a value greater than 0 and less than or equal to 1.</p>
Name	When creating or editing	Name of the promotion. Does not have to be unique.
Optimal Budget		
Optimal Lift		
Optimal Price Decrease		
Optimal Profit		
Optimal Revenue		
Optimal Type		Indicates the optimal vehicle type for this promotion. This attribute is a lookup attribute that uses the Promotion Type level.

Attribute	When Displayed	Purpose
Optimization Goal	When optimizing	<p>Select one of the following goals for this promotion:</p> <ul style="list-style-type: none"> <li>• Maximize Revenue</li> <li>• Maximize Profit</li> <li>• Maximize Units</li> </ul> <p>This attribute is a lookup attribute that uses the Optimization Goal level.</p>
Optimization Range End	When optimizing	<p>By default, 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 attributes to specify the range of time for optimization to consider.</p>
Optimization Range Start	When optimizing	
Optimization Status	Never displayed	Status of the optimization process on this promotion. Uses a lookup table that should not be edited.
Population	When creating or editing	Combinations where this promotion will run and dates of the promotion.
Promotion Status	Not used.	Ignore this attribute. It is not used.
Promotion Type1	Never displayed	Current vehicle type for this promotion. This attribute is a lookup attribute that uses the Promotion Type level.
Return on Investment (ROI)		
Scenarios	When creating or editing	Scenario to which this promotion belongs. This attribute is a lookup attribute that uses the Scenarios level.
Start Ship	When creating or editing	

Attribute	When Displayed	Purpose
Status	Never displayed; not used directly	
Vehicle Type	When creating or editing	Type of the promotion. This attribute is a lookup attribute that uses the Promotion Type level.

## Promotion Status

This level contains the PTP promotion statuses.

## Promotion Type

This level contains the promotion types, by default, the following set:

Type	Details
Display	Display Only
F. Shopper	F Shopper
F&D	Feature and Display
Feature	Feature Only
National TV	National TV advertising. If this does not apply, you can use this type as a placeholder for another type, as needed.
TPR	Temporary price reduction only.

Consultants can add other types, but changes are needed in multiple places if this is done. The documentation for this is currently out of scope.

## Scenarios

This level contains the scenarios, which have the following purposes:

- 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.

- Current Year should contain the promotions that are planned for the current fiscal year.
- Sandbox should contain all promotions that are not yet planned.

## Optimization Goal

This level contains the predefined optimization goals. Do not make changes to this level.

## Plans

This level is not used in PTP worksheets.

## Lookup Tables

This section lists the configurable lookup tables used by promotion levels and series.

**Note:** You can change the contents of these table, but you should not change their structure.

## Cons\_type

This table lists types of consumer overlays and for each type, indicates the number of units included in the deal to the consumer. This lookup table is used by the Cons Promo attribute, the Cons Promo series, and the Cons Promo P series. This table has the following structure:

Field	Required?	Data type	Purpose
CONS_TYPE_ID	required	NUMBER(10)	Unique ID for Oracle internal use.
CONS_TYPE_CODE		VARCHAR2(50)	Code for the consumer overlay.
CONS_TYPE_DESC		VARCHAR2(50)	Name of the consumer overlay.
IS_FICTIVE		NUMBER(1)	Leave these null.

Field	Required?	Data type	Purpose
SELF_SHAPE_INDICATOR		NUMBER(5)	
IG_SHAPE_INDICATOR		NUMBER(5)	
OMIT_SEASONAL		NUMBER(5)	
FICTIVE_CHILD		NUMBER(10)	
LAST_UPDATE_DATE		DATE	

## Pay\_Type\_lookup

This table controls the drop-down choices in the Pay Type series. This table has the following structure:

Field	Required?	Data type	Purpose
PAY_TYPE_ID	required	NUMBER(10)	Unique ID for Oracle internal use.
PAY_TYPE_CODE		VARCHAR2(50)	Code for the consumer overlay.
PAY_TYPE_DESC		VARCHAR2(50)	Name of the consumer overlay.
IS_FICTIVE		NUMBER(1)	Leave these null.
SELF_SHAPE_INDICATOR		NUMBER(5)	
IG_SHAPE_INDICATOR		NUMBER(5)	
OMIT_SEASONAL		NUMBER(5)	

Field	Required?	Data type	Purpose
FICTIVE_CHILD		NUMBER(10)	
LAST_UPDATE_DATE		DATE	

## Methods

PTP uses the following custom methods.

### Optimize Promotion

This method uses the Call Promotion Optimizer predefined workflow. The Call Promotion Optimizer workflow consists of three steps:

1. The first step initializes the necessary fields in the database. This step collects arguments, passes them to the APPPROC\_PRE\_OPTIMIZATION stored procedure, and then runs that stored procedure.

**Caution:** You should not change this step.

2. The second step calls the optimizer. This is a custom step that collects arguments and calls the OPL class file, which runs the optimization.

**Note:** You must configure this for your specific installation, as described in Configuring the Optimization Step.

3. The final step cleans up the necessary fields in the database, collects arguments, passes them to the APPPROC\_POST\_OPTIMIZATION stored procedure, and then runs that stored procedure.

**Caution:** You should not change this step.

If the user uses this method, Demantra creates a virtual promotion that the user can display along with the current promotion (in the PMO: Optimization Comparison worksheet).

### Accept Optimization

This method saves the optimized promotion, overwriting the previous details.

Specifically, it copies data from the optimized series to the corresponding standard series, for the selected promotion. For example, it copies data from # Wks O to # Wks.

This method uses the AcceptOptimization predefined workflow. This workflow consists of one step (which calls the APPPROC\_ACCEPT\_OPTIMIZATION procedure).

## Procedures

PTP uses the following custom procedures.

Procedure	Purpose
AP PPROC_ACCEPT_OPTIMIZATION	Used by Promotion Optimization.
APPPROC_BLE_ACTUALS_LY	Updates the ActualLY series.
AP PPROC_BLE_VOLUME_BASE_FUTURE	<p>Updates sales_data.vol_base_ttl, for all dates.</p> <p>For dates in the future, this procedure sets the field equal to the latest base forecast from the engine.</p> <p>For dates in the past, this procedure sets the field equal to the value of sales_data.sdata5, the syndicated base volume.</p>
AP PPROC_BLE_VOLUME_BASE_HIST	<p>Updates sales_data.vol_base_ttl, for dates in the past.</p> <p>This procedure sets the field equal to the value of sales_data.sdata5, the syndicated base volume.</p>
APPPROC_CLEAR_DATA	Clears the sales_data, mdp_matrix, promotion, and promotion_data tables. Called by the Data Loading Wizard.
APPPROC_COPY_DEF_RETAILER	<p>Iterates through all retailers, finds any that have been marked as using the default profile, and copies the default attribute values to each of those retailers.</p> <p>This procedure is also called by the Data Loading Wizard.</p>
APPPROC_DROP_TEMPS	Drops the temporary tables.
AP PPROC_MAINTAIN_TERR_RETAILER	<p>Populates the Manufacturer level and the Territory-Retailer level.</p> <p>This procedure is called by the Data Loading Wizard.</p>



Procedure	Purpose
APPPROC_POST_DATA_LOAD	<p>This procedure completes the last steps needed during data loading:</p> <ul style="list-style-type: none"> <li>• Updates the LAST_DATE_BACKUP parameter in the INIT_PARAMS_0 table to equal the last sales date in the system.</li> <li>• Runs the APPPROC_COPY_DEF_RETAILER procedure.</li> <li>• Runs the APPPROC_MAINTAIN_TERR_RETAILER procedure.</li> <li>• Updates the promotion_data table with values loaded into sales_data.</li> <li>• Updates sales_data .vol_base_ttl according to the sdata5 column that was loaded. This initiates the APPTRIG_VOLUME_BASE_UPDATE_SD trigger; see "Triggers".</li> </ul> <p>This procedure is called by the Data Loading Wizard.</p>
APPPROC_POST_OPTIMIZATION	Used by Promotion Optimization.
APPPROC_PRE_OPTIMIZATION	Used by Promotion Optimization.

Instead of running procedures directly, use the workflows provided by PTP. See "Administration" and "Workflows".

## Triggers

PTP uses the following custom triggers.

Trigger	When activated	Action
A PPTRIG_INSERT_PROMOTION	When inserting promotion	Gets list price, shelf price, and COGs from sales_data and copies them to promotion_data.

Trigger	When activated	Action
A PPTRIG_INSERT_PROMOTION_PAST	When inserting promotion in the past	Updates the following series for this promotion: <ul style="list-style-type: none"> <li>• Avg Rtl sd</li> <li>• Incr Evt Vol Act</li> <li>• Base Evt \$ Rtl Act</li> <li>• Incr Evt \$ Rtl Act</li> </ul>
AP PTRIG_SHELF_PRICE_UPDATE_SD	When updating shelf price on sales_data.	Copies that data into promotion_data.
APP TRIG_VOLUME_BASE_UPDATE_PD	When inserting a promotion	Gets sales_data.volume_base_ttl and updates the field by the same name in promotion_data.
A PPTRIG_VOLUME_BASE_UPDATE_SD	When updating volume_base_ttl in sales_data.	Copies that data into promotion_data

## Workflows

PTP uses the following workflows:

Workflow	When to run	Description
AcceptOptimization	Do not run directly.	Used by the Accept Optimization method.
Call Promotion Optimizer	Do not run directly.	Used by the Optimize Promotion method.  <b>Note:</b> Includes installation-dependent details and must be configured for each installation.

Workflow	When to run	Description
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.	Executes the APPPROC_COPY_DEF_RETAILER procedure.
Create Member	Do not run directly.	Used internally when a user creates a member of a level.
Delete Member	Do not run directly.	Used internally when a user deletes a member of a level.
DoNothing	Do not use.	Do not use.
Edit Member	Do not run directly.	Used internally when a user edits a member of a level.
Import Promo Data	Not required.	Provided for you to use if you want to load data manually rather than using the Data Loading Wizard.
ImportPromotionLevels	Not required.	Provided for you to use if you want to load data manually rather than using the Data Loading Wizard.
Paste Member	Do not run directly.	Used internally when a user pastes a member of a level.
Run App Proc After Batch Engine	Run this after you run the Analytical Engine.	Runs the following required procedures: <ul style="list-style-type: none"> <li>• APPPROC_BLE_ACTUALS_LY</li> <li>• APPPROC_BLE_VOLUME_BASE_FUTURE</li> </ul>
Run Drop Temps	Run this daily.	Executes the APPPROC_DROP_TEMPS procedure.
Run Engine and BLE		Do not use.

Workflow	When to run	Description
runprocsteps	Do not run directly.	Used by the Optimize Promotion method.

## Engine Configuration

This section describes the basic engine configuration in PTP.

### Forecast Tree

The PTP forecast tree is as follows:

Forecast level number	Levels used in this forecast level		Notes
	Item level	Location level	
1	Lowest level	Lowest level	
2	Promotion Group	Territory Retailer	This is also the lowest promotional level (LPL).
3	Brand	Retailer	This is also the influence group level (IGL).
4	Category	Retailer	This is also the influence range level (IRL).
5	Highest fictive level	Highest fictive level	

### Parameter Settings

In PTP, the following parameter values are set for the Analytical Engine:

Setting	Value	Notes	Needed for
COMPETITION_IT EM	352	This is the manufacturer level.	Analytical Engine
COMPETITION_L OCATION	237	This setting refers to the Competition_Location group table, which has only one row. This has the same effect as setting COMPETITION_LOCATION equal to the Retailer level.	
CalcOptimizationI nput	yes		Promotion Optimization
StartAverage	0		
AverageHorizon	52	Specify the length of time, in base time units, to use in calculating the average baseline forecast. Typically one year or half a year is suitable.	
BottomCoefficientL evel	2		
TopCoefficientLev el	3		

## Engine Models

Only the linear models work with Promotion Optimization. Therefore, in the model table in the database, the following models are marked as IS\_OPTIMIZATION=1: R-REGR, M-MRIDGE, and C-CMREG.



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# Index

## A

---

ActualLY, 16-4

actuals

- colors used for deviations, 15-36, 16-4
- compared to projections, 12-3, 12-6
- details for event, 12-3, 12-6
- used in TPMO, 2-9
- versus plan, 6-3

Actuals Base, 16-4

Actuals Incr, 16-4

Actuals scenario, 16-30

Actuals Ttl, 16-4

Actuals versus Plan summary pane, 6-3

aggregation

- introduction, 2-1
- kinds of levels, 2-1

ampersand, in Oracle Demantra Spectrum, 4-2

Analytical Engine

- configuring for optimization, 16-38
- running in simulation mode, 10-3
- typical use, 1-7

applet

- installing, 3-2, 6-2, 6-8

APPPPROC\_COPY\_DEF\_RETAILER, 16-34

APPPPROC\_BLE\_ACTUALS\_LY, 16-34

- running from a workflow, 16-37

APPPPROC\_BLE\_VOLUME\_BASE\_FUTURE, 16-34

- running from a workflow, 16-37

APPPPROC\_BLE\_VOLUME\_BASE\_HIST, 16-34

APPPPROC\_COPY\_DEF\_RETAILER

- running from a workflow, 16-37

APPPPROC\_DROP\_TEMPS, 16-34

- running from a workflow, 16-37

APPPPROC\_MAINTAIN\_TERR\_RETAILER, 16-23, 16-24, 16-34

APPPPROC\_POST\_DATA\_LOAD, 16-35

APPPPROC\_POST\_OPTIMIZATION, 16-35

APPPPROC\_PRE\_OPTIMIZATION, 16-35

APPPPROC\_ACCEPT\_OPTIMIZATION, 16-34

APPTRIG\_INSERT\_PROMOTION, 16-35

APPTRIG\_INSERT\_PROMOTION\_PAST, 16-36

APPTRIG\_SHELF\_PRICE\_UPDATE\_SD, 16-36

APPTRIG\_VOLUME\_BASE\_UPDATE\_PD, 16-36

APPTRIG\_VOLUME\_BASE\_UPDATE\_SD, 16-36

attachment

- adding, 4-14
- downloading, 4-15
- permissions for, 4-16
- removing, 4-15

attribute

- copying from optimized promotion to original promotion, 10-9, 15-26
- editing for retailer, 6-7
- of promotion, reference, 16-27
- of retailer, reference, 16-24
- specifying for promotion, 9-7

audit trail

- defining profile for viewing, 4-20
- for a combination, 4-19
- introduction, 4-17

AverageHorizon parameter, 16-39

Avg Rtl, 16-5

Avg Rtl sd, 16-5

axes of a worksheet, specifying, 13-20

## **B**

---

Base Evt Vol, 16-6

Base Evt Vol O, 16-6

Base Fcst, 16-6

batch run, 14-3

BDF

- introduction, 2-8

- series names, 7-2

- setting fund amounts, 7-3, 7-6

- using fund, 9-8

- viewing fund balances, 9-3

- viewing funds, 7-7

BDF Alloc, 16-6

BDF Auth, 16-6, 16-7

BDF Bal, 16-7

BDF Base Rate, 16-7

BDF Dev Rate, 16-7

BDF Fixed Funds, 16-7

bill-to locations, 2-4

BottomCoefficientLevel parameter, 16-39

brand

- and other levels, 16-23

- introduction, 2-3

budget

- consuming, 9-8

- establishing, 7-3, 7-6

- introduction, 2-8

- series names, 7-2

- viewing, 7-7

- viewing balance, 9-3

Business Modeler, starting, 14-8

Buydown, 16-7

Buydown \$, 16-7

Buydown O, 16-7

## **C**

---

cache, worksheet

- enabling for a worksheet, 13-5

- refreshing manually, 4-17

CalcOptimizationInput parameter, 16-39

Canbl \$, 16-8

Canbl \$ Rtl, 16-8

cannibalization

- introduction, 2-10

manufacturer

- actual, 12-4

- actual versus projected, 12-3

retailer

- actual, 12-7

- actual versus projected, 12-3

categories

- introduction, 2-3

- in World Brands, 15-2

characters to avoid, 4-2

client expressions and recalculation, 4-3

Collaborator Workbench

- adding content panes, 13-5

- introduction, 1-2

- key metrics, 6-3

- logging in, 6-1

- opening worksheets, 6-8

- personalizing, 6-11

combination

- exporting data for, 4-6

- including in worksheet, 13-11, 13-12

companies, 2-5

Cons Promo, 16-9

Cons Promo P, 16-9

content

- adding pane from existing panes, 6-11

- introduction to options, 13-2

- options, 13-5

- predefined summary panes, 6-3

cost benefit review

- for future promotion, 11-3, 11-9

- for optimized promotion, 10-8

- for promotions in selected scenario, 9-5

CPI (Consumer Price Index), 13-14

CPIU

- comparing promotions, 11-9

- how computed, 16-9

CPIU O, 16-9

CPIU P, 16-10

Cumulative Actuals, 16-10

Cumulative Plan, 16-10

Current Year scenario, 2-7, 16-31

## **D**

---

dashboard

- adding content panes, 13-5



- introduction, 1-2
- key metrics, 6-3
- logging in, 6-1
- opening worksheets, 6-8
- personalizing, 6-11
- data
  - copying and pasting with Excel, 4-6
  - copying and pasting within worksheet, 4-5
  - editing, 4-1
  - exporting to Excel, 4-6
  - importing into Excel, 4-7
  - printing, 4-10
  - saving changes, 5-6
- database
  - connecting to via DOL, 4-7
- default
  - combinations for new promotion, 9-7
  - combinations in worksheet, 13-12
  - layout in Collaborator Workbench, 6-11
  - recalculation, 4-3
  - table sort, restoring, 4-4
  - worksheet view layout, 13-20
- demo
  - background of sample company, 15-2
  - user IDs and passwords, 15-3
- districts, 2-5
- divisions, 2-5
- DOL, using, 4-7
- Dynamic Open Link, using, 4-7

## E

---

- email
  - escalating a task, 6-11
  - sending notification of task, 6-9
  - specifying for users, 14-9
- empty rows
  - controlling display, 5-5
  - saving setting, 5-8
- End Ship, 16-10
- ep\_load\_main, 16-23, 16-24
- event
  - accepting optimization, 10-9
  - approving, 9-9
  - closing, 9-10
  - committing, 9-9
  - comparing to other events in scenario, 11-8

- copying and pasting, 9-13
- costs and spending, 2-9
- creating, 9-6
- deleting, 9-13
- evaluating future event, 11-2
- evaluating past event, 12-2, 12-5
- introduction, 2-6
- life cycle, 2-7
- marking as paid, 9-10
- marking as planned, 9-8
- modifying, 9-10
- optimization results, 10-7
- optimizing, 10-4
- projections and actuals, 12-3, 12-6
- reference for attributes, 16-27
- specifying how to fund, 9-8
- Evt Spend, 16-10
- Evt Spend exS, 16-10
- Evt Spend exS O, 16-10
- Evt Spend exS P, 16-11
- Evt Status, 16-11
  - display color, 9-3
- Excel
  - copying data to, 4-6
  - exporting data to, 4-6
  - linking data into via Dynamic Open Link (DOL), 4-7
  - pasting data from, 4-6
- exception filter, applying to worksheet, 13-18
- exchange rate
  - introduction, 13-14
  - used in worksheet, 13-16
- exiting, 3-7
- extra filters option, 13-5

## F

---

- files
  - attaching to a task, 6-10
  - attaching to notes, 4-14
  - downloading from notes, 4-15
- filter
  - adding for when worksheet opens, 13-5
  - adding to worksheet view, 13-26
  - and other performance tips, 13-29
  - at user level, 14-11
  - filtering series in worksheet editor, 13-8

- for bar charts, 13-6
  - introduction, 13-16
- finding elements, 13-8
- fixed funds
  - introduction, 2-8
  - series names, 7-2
- forecast
  - affected by promotions, 2-7
  - and actuals, 7-3
  - and simulation, 10-1
  - and unplanned promotions, 2-7
  - and volume breakdown, 2-9
  - introduction, 1-7
  - viewing, 8-3
- forecast tree and Promotion Optimization, 16-38
- funds
  - introduction, 2-8
  - series names, 7-2
  - setting amounts, 7-3, 7-6
  - using, 9-8
  - viewing, 7-7
  - viewing balances, 9-3

## G

---

- graph
  - adding series to, 13-21
  - changing style, 5-4
  - choosing type, 13-20
  - time resolution of, 13-9
  - viewing note from within, 4-13
- group
  - adding users to, 14-12

## H

---

- Hide Empty Rows, 5-5
- hung session, ending, 3-7

## I

---

- illegal characters, 4-2
- incr\_vol\_no\_unplan, 16-14
- Incr Evt \$, 16-11
- Incr Evt \$ Net, 16-11
- Incr Evt \$ O, 16-11
- Incr Evt \$ P, 16-12
- Incr Evt \$ Rtl, 16-12

- Incr Evt \$ Rtl sd, 16-12
- Incr Evt Vol, 16-12
- Incr Evt Vol Act, 16-12
- Incr Evt Vol Fut, 16-12
- Incr Evt Vol O, 16-12
- Incr Evt Vol P, 16-13
- Incr Fcst, 16-13
- Incr Mfg Prft, 16-13
- Incr Mfg Prft O, 16-13
- Incr Mfg Prft P, 16-14
- Incr Rtl Prft, 16-14
- Incr Rtl Prft O, 16-14
- Incr Rtl Prft P, 16-14
- index (financial)
  - in audit trail, 4-19
  - introduction, 13-14
  - used in worksheet, 13-16
- Is\_self, 16-15
- items, 2-3
- item-type levels, introduction, 2-2

## J

---

- Java
  - preventing updates, 3-2
  - Web Start, 6-2
- JRE, 6-2
  - installing, 3-2

## L

---

- layout, Collaborator Workbench
  - configuring by user, 6-11
  - configuring My Tasks, 6-13
  - configuring My Worksheets, 6-14
- layout, worksheet
  - defining, 13-20
  - saving changes, 5-6, 5-7
  - tips, 13-28
- level
  - adding to worksheet, 13-11
  - in worksheet, 13-11
  - item levels in TPMO, 16-23
  - location levels in TPMO, 16-23
  - on worksheet tab, 13-21
  - promotion levels in TPMO, 16-26
- Lift, 16-15
- lift decomposition, manufacturer

- introduction, 2-10
- projected and actual, 12-3
- lift decomposition, retailer
  - actual, 12-7
  - introduction, 2-11
  - projected and actual, 12-7
- Lift O, 16-15
- links in Collaborator Workbench
  - adding link within a task, 6-10
- List Price sd, 16-15
- location-type levels, introduction, 2-2
- logging off, 3-7
  - if session hangs, 3-7

## **M**

---

- manufacturer
  - and other levels, 16-23
  - incremental profit, 10-8
  - introduction, 2-3
  - maintaining level, 16-34
- MDF
  - introduction, 2-8
  - series names, 7-2
  - setting fund amounts, 7-3, 7-6
  - using fund, 9-8
  - viewing fund balances, 9-3
  - viewing funds, 7-7
- MDF Alloc, 16-15
- MDF Auth, 16-15, 16-16
- MDF Bal, 16-16
- MDF Base Rate, 16-16
- MDF Dev Rate, 16-16
- MDF Fixed Funds, 16-16
- member
  - and Open With context, 13-5
  - introduction, 2-2
- methods, reference information, 16-33
- Mfg Prft O, 16-16
- Mfg Profit, 16-16
- Mfg Profit Var, 16-16
- models for use with Promotion Optimization, 16-39
- My Tasks
  - configuring, 6-11
  - configuring and sorting of number of tasks, 6-13

- refreshing, 6-9
- My Worksheets, 6-8
  - configuring, 6-11
  - configuring list of worksheets, 6-14
  - sending a worksheet as a task, 6-9
  - worksheet descriptions in, 13-4

## **N**

---

- Net Incr Evt \$, 16-17
- Net Incr Evt \$ Rtl, 16-17
- note
  - adding, 4-13
  - adding an attachment, 4-14
  - deleting, 4-13
  - editing, 4-13
  - saving changes, 5-6
  - setting permissions, 4-16
  - viewing, 4-13
- Notes/Attachments subtab, 4-12, 4-14

## **O**

---

- Open With menu
  - introduction, 3-6
  - specifying context for filtering, 13-5
- optimization
  - accepting results, 10-9, 10-9
  - effect on color of Evt Status, 9-3
  - introduction, 1-7
  - performing, 10-4
- Optimization Comparison worksheet, 10-7, 10-10
- Optimized series, 16-17

## **P**

---

- parameters
  - for optimization, 10-5
  - for Promotion Optimization, 16-38
- password, changing, 3-8
- Past End Date, 16-18
- Pay Type, 16-18
- Pay Type series, 16-32
- performance tips for worksheet design, 13-28
- permission level
  - specifying for user, 14-9, 14-9
- permissions in a note, 4-16
- personalization

- My Tasks, 6-13
- My Worksheets, 6-14
  - wide and narrow panes, 6-11
- Planning Environment worksheet, 9-1, 9-14
- Planning Hierarchy summary pane, 6-4, 6-5, 6-6, 6-8, 6-8
- Plan Vol, 16-18
- PMO
  - worksheets of, 1-6
- Pre-Post \$, 16-18
- Pre-Post \$ Rtl, 16-18
- Pre-Post Vol, 16-19
- printing, 4-10
- procedures, reference information, 16-34
- product groups, 2-4
- product lines, 2-4
- product subgroups, 2-4
- profile for selecting parts of audit trail, 4-20
- projections
  - colors used for deviations, 15-36, 16-4
  - compared to actuals, 12-3, 12-6
- Promo Effect - Mfg worksheet, 11-2, 11-10
- Promo Effect - Rtl worksheet, 11-14
- Promo-Evaluation Mfg worksheet, 12-2, 12-9
- Promo-Evaluation Rtl worksheet, 12-5, 12-13
- promotion
  - accepting optimization, 10-9
  - approving, 9-9
  - closing, 9-10
  - committing, 9-9
  - comparing to other promotions in scenario, 11-8
  - copying and pasting, 9-13
  - costs and spending, 2-9
  - creating, 9-6
  - deleting, 9-13
  - evaluating future promotion, 11-2
  - evaluating past promotion, 12-2, 12-5
  - introduction, 2-6
  - life cycle, 2-7
  - marking as paid, 9-10
  - marking as planned, 9-8
  - modifying, 9-10
  - optimization results, 10-7
  - optimizing, 10-4
  - projections and actuals, 12-3, 12-6
  - reference for attributes, 16-27
  - specifying how to fund, 9-8

- specifying how to fund, 9-8
- Promotion Comparison worksheet, 11-8, 11-17
- promotion group
  - and other levels, 16-23
  - creating a promotion for, 9-6
  - introduction, 2-4
  - in World Brands, 15-2
  - specifying quotas and funds, 7-6
- Promotion History worksheet, 12-17
- Promotion Optimization
  - parameters, 16-38

## Q

---

- quota
  - managing, 7-1
  - percent attained, 9-3
  - specifying bottom-up, 7-6
  - specifying top-down, 7-3
  - versus sales, 6-3
  - viewing, 7-7
- Quota and Fund Entry Bottom-Up worksheet, 7-6, 7-10
- Quota and Fund Entry Top-Down worksheet, 7-3, 7-8
- Quota and Fund View worksheet, 7-7, 7-10
- quote marks, in Oracle Demantra Spectrum, 4-2

## R

---

- redo, 4-3
- refreshing, 6-9
- regions, 2-5
- resizing, 5-4
- restoring default table sorting, 4-4
- retailer
  - creating promotion for, 9-6
  - editing profile, 6-5
  - effect on optimization, 10-4
  - evaluating past promotion, 12-5
  - incremental profit, 10-8
  - introduction, 2-5
  - introduction to profiles, 2-8
  - reference for attributes, 16-24
  - retailers for World Brands, 15-2
  - running workflow to copy default profile, 14-3
  - setting quotas and funds for, 7-3
- right-click menu

- and copying data, 4-5
- and editing data, 4-2
- and opening notes, 4-12
- as basic navigation tool, 1-5
- in Planning Hierarchy, 6-4
- introduction, 3-6

Rtl Prft, 16-19

Rtl Prft O, 16-19

Run App Proc After Batch Engine, 16-37

Run Engine and BLE procedure, 14-3

## **S**

---

Sale Price, 16-19

Sale Price O, 16-19

sales areas, 2-5

Sales Quota, 16-19, 16-19

Sales Var, 16-19

Sales versus Quota, 6-3

Sales versus Quota summary pane, 6-3

Sandbox scenario, 2-7, 16-31

- comparing promotions in, 11-8

scenarios

- comparing promotions in, 11-8
- introduction, 2-7
- reference, 16-31

scheduling workflow instances, 14-4

segment

- and other levels, 16-23
- introduction, 2-3

selection task, marking as done, 6-9

series

- available to user, 14-11
- editing data, 4-1
- for lift decomposition, 11-4
- introduction, 2-2
- making available for specific user, 14-10
- reference information, 16-1
- related to funds, 7-2
- related to volume, 7-3
- selecting, 13-7
- specifying display, 13-21

Shelf Price, 16-19

Shelf Price sd, 16-19

Shipments, 16-19

simulation

- accepting, 10-4

- introduction, 1-7
- running, 10-3
- starting Simulation Engine, 10-3
- useful worksheets, 10-2

Slot Auth, 16-20

Slot Bal, 16-20

slotting funds

- introduction, 2-8
- series, 7-2
- viewing balance, 9-3

sorting

- controlling order of series in table, 13-20
- restoring default table sort, 4-4
- saving sort order, 5-8
- series in worksheet editor, 13-8
- sort order in My Tasks, 6-14
- worksheet table, 4-4

special characters (to avoid), 4-2

StartAverage parameter, 16-39

Start Event, 16-20

Start Event O, 16-20

Start Event P, 16-20

starting

- Business Modeler, 14-8
- TPMO, 3-1
- workflow instance, 14-4

Start Ship, 16-20

subtabs of worksheet

- Notes/Attachments, 4-12, 4-14
- other worksheet as subtab, 13-25

summary panes

- Actuals versus Plan, 6-3
- Planning Hierarchy, 6-4, 6-5, 6-6, 6-8, 6-8
- Sales versus Quota, 6-3
- Volume Breakdown, 6-4

Sun JRE, 6-2

synchronization

- between views, 5-3, 5-7, 13-23

syndicated data, 1-1

## **T**

---

tabs versus windows

- for separate worksheets, 5-1
- for worksheet views, 5-3

task

- configuring My Tasks, 6-13

- creating and sending, 6-9
- marking as done, 6-9
- territory
  - introduction, 2-5
  - managing funds and quotas, 7-3
  - tracking volume, 8-2
  - viewing fund balances, 9-3
- Territory-Retailer level
  - maintaining, 16-34
  - purpose, 16-24
- time level and time axis, 5-4
- time resolution, specifying for worksheet, 13-9
- Top/Bottom filter, specifying, 13-6
- TopCoefficientLevel parameter, 16-39
- TPM
  - worksheets of, 1-3
- TPMO, logging on, 3-1
- triggers, reference information, 16-35
- troubleshooting
  - cannot see new promotion, 3-6
- Ttl Evt \$, 16-20
- Ttl Evt \$ O, 16-20
- Ttl Evt \$ P, 16-20
- Ttl Evt \$ Rtl, 16-21
- Ttl Evt Vol, 16-21
- Ttl Evt Vol O, 16-21
- Ttl Evt Vol P, 16-21
- Ttl Fcst, 16-21
- Ttl Fund Auth, 16-21
- Ttl Fund Bal, 16-21

## U

---

- undo, 4-2
- Units, 16-21
- units of measure
  - introduction, 13-14
  - in worksheet, 13-14
- Unmatched \$, 16-21
- Uplift, 16-21
- user
  - access to series, 14-11
  - adding to groups, 14-12
  - changing password, 3-8
  - creating, 14-9
  - deleting, 14-13
  - filtering data, 14-11

- forcing logout, 3-7
- IDs and passwords for the demo, 15-3
- specifying modules, 14-10

## V

---

- Veh \$, 16-21
- Veh \$ O, 16-22
- Vehicle Cost DISPLAY, 16-22
- Vehicle Cost F. SHOPPER, 16-22
- Vehicle Cost FEATURE, 16-22
- Vehicle Cost NATIONAL TV, 16-22
- Vehicle Cost TPR, 16-22
- Veh Type, 16-22
- Veh Type O, 16-22
- Veh Type P, 16-22
- view
  - adding to worksheet, 13-23
  - and worksheet, 5-3
  - defining layout, 13-20, 13-20
  - deleting from worksheet, 13-24
  - enabling or disabling, 13-23
  - hiding worksheet levels, 13-21
  - introduction, 5-3
  - managing elements of, 5-4
  - managing position and size, 5-3
  - renaming, 13-23
  - restoring default layout, 13-22
  - synchronization, 13-23

- volume
  - actual versus plan, 6-3
  - breakdown, 2-9, 6-4, 7-3
  - breakdown week by week, 8-4
  - creating for newly entered promotion, 10-3
  - for past and future, 2-9
  - series, 7-3
  - tracking, 8-1
  - used in accruing funds, 2-8, 7-2
  - week by week, 8-3
  - year on year, 8-2
- Volume Base, 16-22
- Volume Base Ttl, 16-23
- Volume Breakdown summary pane, 6-4
- Volume Incr Ttl, 16-23
- Volume Tracking worksheet, 8-1, 8-2, 8-5

## W

---

Web server, launching workflows when starting, 14-6

Whoxd5 s Online, configuring, 6-11

windows versus tabs

- for separate worksheets, 5-1

- for worksheet views, 5-3

workflow

- email addresses used in, 14-9

- reference information, 16-36

- schema instances

  - launching at Web server start, 14-6

  - scheduling, 14-4

  - starting, 14-3

  - stopping, 14-7

Workflow Manager, logging on, 14-3

worksheet

- adding notes, 4-13

- adding to My Worksheets, 6-14

- closing, 5-2

- copying to Excel, 4-6

- data in, 2-2

- deleting, 13-28

- deleting notes, 4-13

- design

  - adding a subtab worksheet, 13-25

  - aggregating and organizing, 13-11

  - basics, 13-4

  - caching, 13-5

  - exception filter, 13-18

  - filtering individual view, 13-26

  - index used in, 13-14

  - selecting series, 13-7

  - specifying elements to include, 13-24

  - time criteria, 13-9

  - tips, 13-28

  - units of measure, 13-14

  - views in, 13-20

- displaying multiple, 5-1

- editing notes, 4-13

- exporting to Excel, 4-6

- how aggregated and organized, 2-1

- layout, 13-20

- linking via Dynamic Open Link (DOL), 4-7

- notes in, 4-13

- ownership and security, 13-28

- printing, 4-10

- Promotion History, 12-17

- saving definition, 5-6, 5-7

- sending as task to another user, 6-9

- sorting data, 4-4

- specifying note permissions, 4-16

worksheets

- general introduction, 1-3

- Optimization Comparison, 10-7, 10-10

- Planning Environment, 9-1, 9-14

- Promo Effect - Mfg, 11-2, 11-10

- Promo Effect - Rtl, 11-14

- Promo-Evaluation Mfg, 12-2, 12-9

- Promo-Evaluation Rtl, 12-5, 12-13

- Promotion Comparison, 11-8, 11-17

- Quota and Fund Entry Bottom-Up, 7-6, 7-10

- Quota and Fund Entry Top-Down, 7-3, 7-8

- Quota and Fund View, 7-7, 7-10

- Volume Tracking, 8-1, 8-5

World Brands

- introduction to company, 15-2

- users, 15-3

---

## X

x-axis

- and default table sorting, 4-4

- specifying, 13-20

---

## Y

y-axis

- specifying, 13-20

- units and scale, 13-14

