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EnterpriseOne Supply Chain Planning Demand Management 8.12.1 Consensus Conference Room Implementation Guide

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EnterpriseOne Supply Chain Planning Demand Management 8.12.1 Consensus Conference Room Implementation Guide
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Contents

About This Documentation Preface

JD Edwards EnterpriseOne implementation guides provide you with the information that you need to implement and use JD Edwards EnterpriseOne applications from Oracle.

This preface discusses:

- JD Edwards EnterpriseOne application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common fields in implementation guides.

Note. Implementation guides document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common fields for the section, chapter, implementation guide, or product line. Fields that are common to all JD Edwards EnterpriseOne applications are defined in this preface.

JD Edwards EnterpriseOne Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use JD Edwards EnterpriseOne applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using JD Edwards EnterpriseOne menus, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your JD Edwards EnterpriseOne applications most effectively.

Application Fundamentals

Each application implementation guide provides implementation and processing information for your JD Edwards EnterpriseOne applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals implementation guide. Most product lines have a version of the application fundamentals implementation guide. The preface of each implementation guide identifies the application fundamentals implementation guides that are associated with that implementation guide.

The application fundamentals implementation guide consists of important topics that apply to many or all JD Edwards EnterpriseOne applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals implementation guides. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your Implementation Guides Library. You'll find a variety of useful and timely materials, including updates to the full line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guides CD-ROM.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your implementation guide CD-ROM, Oracle makes JD Edwards EnterpriseOne documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of JD Edwards EnterpriseOne documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
Implementation guides support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in implementation guides:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and JD Edwards EnterpriseOne or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).

Typographical Convention or Visual Cue	Description
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

Implementation guides contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the JD Edwards EnterpriseOne system.

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

Implementation guides provide cross-references either under the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in implementation guides:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in implementation guides:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about implementation guides and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Fields Used in Implementation Guides

Address Book Number — Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant ID, participant number, and so on.

As If Currency Code — Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code enables you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.

Batch Number Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).

Batch Date Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.

Batch Status Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:

Blank: Batch is unposted and pending approval.

A: The batch is approved for posting, has no errors and is in balance, but has not yet been posted.

D: The batch posted successfully.

E: The batch is in error. You must correct the batch before it can post.

P: The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to *E*.

U: The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.

Branch/Plant Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.

Business Unit Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.

Category Code Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.

Company Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.

Currency Code Enter the three-character code that represents the currency of the transaction. JD Edwards EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.

Document Company Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.

If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you

can assign the original document number or the system can assign it through the Next Numbers program.

Document Type

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. JD Edwards EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and **Fiscal Year**

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

EnterpriseOne Demand Management Consensus Conference Room Preface

This preface discusses:

- Related documentation.
- Typographical Conventions and Visual Cues.

Note. This Implementation Guide documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or Implementation Guide.

Related Documentation

This section discusses how to:

- Obtain documentation updates
- Order printed documentation

Obtaining Documentation Updates

The EnterpriseOne Demand Management Consensus Conference Room Implementation Guide provides you with information about how to implement and use the EnterpriseOne Consensus Conference Room system. Additional essential information describing deployment and supplemental third-party software options resides in the Supply Chain Planning Hardware and Software Requirements Guide. You should be familiar with the contents of this guide.

Ordering Printed Documentation

You can order printed, bound volumes of the complete Oracle documentation that is delivered on the User Guides CD-ROM. Oracle makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order the documentation in the following ways:

- Electronic mail: appsdoc_us@oracle.com
- FAX: 650–506–7200 Attn: Oracle Sales and Operations Planning Manager
- Postal Service:

  Oracle Sales and Operations Planning Manager

  Oracle Corporation

  500 Oracle Parkway

  Redwood Shores, CA 94065

  USA

If you would like a reply, please give your name, address, telephone number, and electronic mail address (optional).

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions
- Visual cues

Typographical Conventions

The following table contains the typographical conventions that are used in Implementation Guides:

Typographical Convention or Visual Cue	Description
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Implementation Guides contain the following visual cues.

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A note that is preceded by Important! is crucial and includes information that concerns what you must do for the system to function properly.

Note. Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Note. Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about Implementation Guides and other Oracle reference and training materials. Please send your suggestions to:

Oracle Demand Management Consensus Conference Room Documentation Manager

Oracle Corporation

500 Oracle Parkway

Redwood Shores, CA 94065

USA

Or email comments to: appsdoc_us@oracle.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

CHAPTER 1

Getting Started with EnterpriseOne Consensus Conference Room

This chapter provides an overview of EnterpriseOne Consensus Conference Room and discusses:

- EnterpriseOne Demand Management business processes.
- EnterpriseOne Demand Management integrations.
- EnterpriseOne Demand Management implementation.

EnterpriseOne Demand Management Overview

EnterpriseOne Demand Management is a collaborative application in which forecasts from different users (called forecast versions) are compared and reconciled at different levels of abstraction and completeness. The collaborative environment is valuable when you need to calculate product demand that reveals customer patterns, market behavior, and forecasting similarities and differences among users.

EnterpriseOne Demand Consensus consists of the Design Studio and the Consensus Conference Room. Both components of EnterpriseOne Demand Consensus are connected to a database that stores model information and forecast data. The demand model contains data for forecasting and for the business model. The business model contains specific structural information about a business.

Using a centralized database, interaction between the components of EnterpriseOne Demand Consensus can occur seamlessly and in real time. A variety of users, such as sales and marketing personnel, can add forecast data into the same centrally controlled forecast model, and then to compare forecast data. Other features such as exception handling and reconciliation let users check forecast data for errors and anomalies, and combine all of the forecast data into one enterprise forecast.

Design Studio

The Design Studio is a desktop workspace where you create, customize, and maintain demand model information. The Design Studio is connected to a database where model information and forecast data is stored. The demand model contains data for forecasting and for the business model. The business model contains specific structural information about a business. You can use the Design Studio to configure demand model information and allow the information to be used with other EnterpriseOne and external applications.

You can create a new model or modify an existing demand model by sorting, classifying, and assigning properties. When the information about the demand model is defined, it is then configured into an aggregated hierarchical structure that defines the relationships between the units in the hierarchy.

Consensus Conference Room

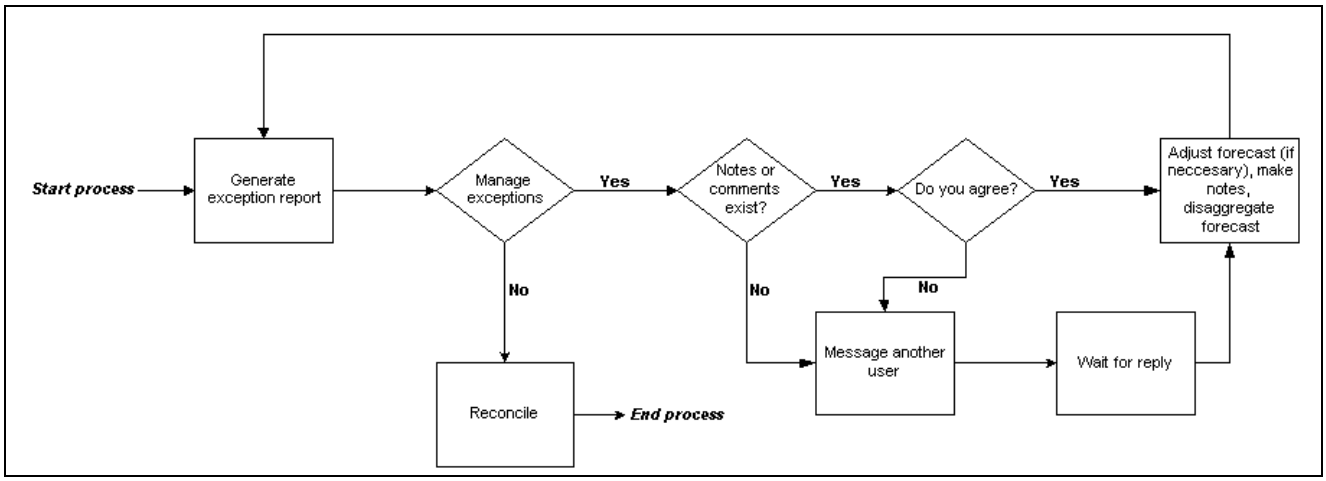
The Consensus Conference Room is a Web-based collaborative application in which you can compare and reconcile forecasts from different users (called forecast versions) at different levels of abstraction and completeness.

The Consensus Conference Room enables various users to compare forecast data for the same product, location and channel where potential exists for demand (called the demand point). When users compare multiple forecast data for the same demand point, they can correct with minimum effort any errors or miscommunications that might occur.

As you use the Consensus Conference Room, you will be able to recognize when forecast data is inaccurate or flawed. Using the collaborative forecasting process, you access data easily, identify inaccuracies, and manage these inaccuracies in forecast data across multiple business units.

EnterpriseOne Demand Management Business Processes

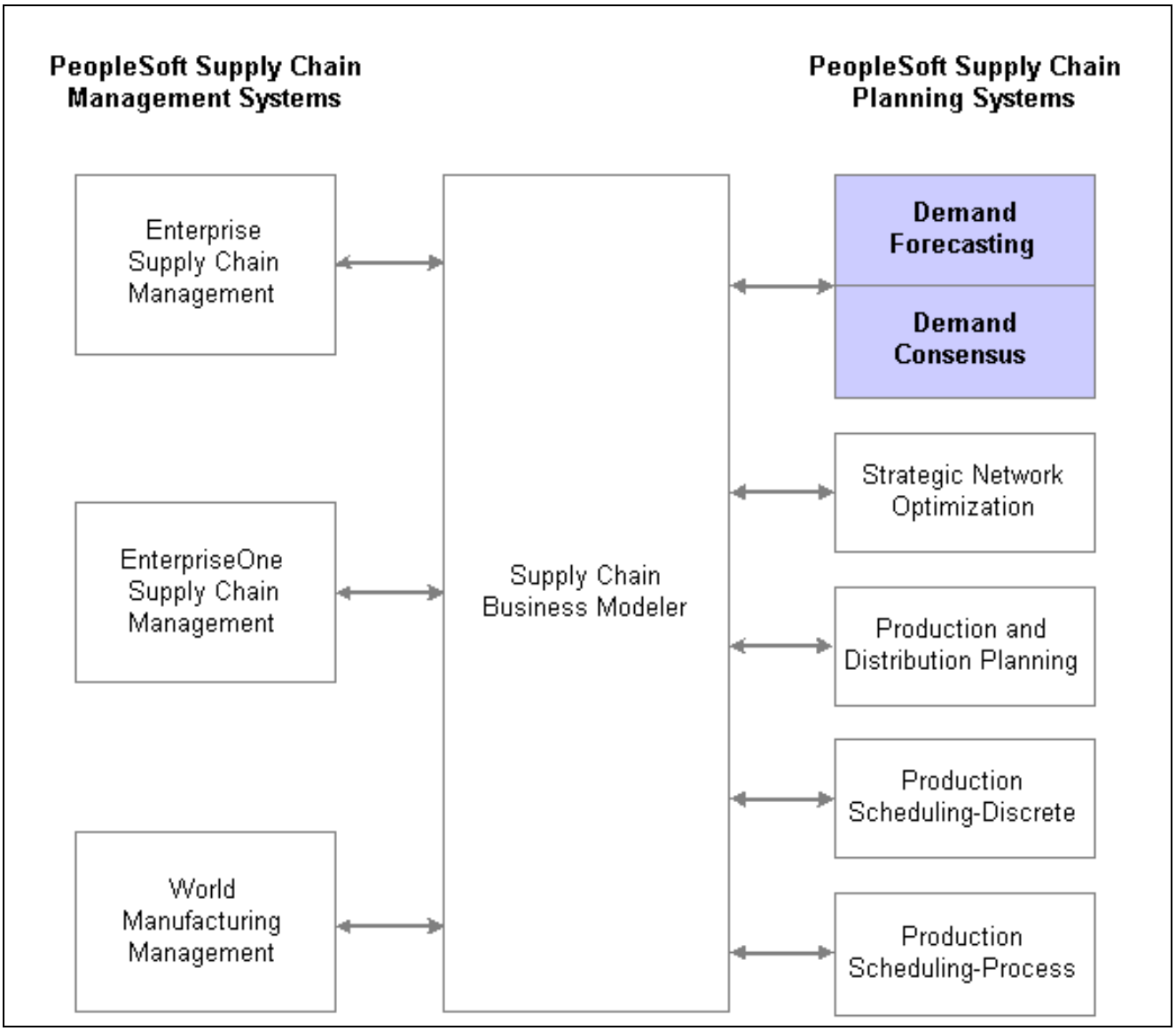
This process flow illustrates the Demand Management process:



EnterpriseOne Demand Forecasting business process flow

EnterpriseOne Demand Management Integrations

EnterpriseOne Demand Management can integrate with other EnterpriseOne Supply Chain Management and EnterpriseOne Supply Chain Planning systems through the EnterpriseOne Supply Chain Business Modeler application. The following diagram shows how EnterpriseOne Demand Management integrates with other applications through EnterpriseOne Supply Chain Business Modeler:



EnterpriseOne Demand Management integrations

Using EnterpriseOne Supply Chain Business Modeler, you can transfer supply chain data from EnterpriseOne Supply Chain Management systems into EnterpriseOne Demand Management. You can then use Demand Management to create enterprise demand forecasts and inventory safety targets based on the data.

After creating forecasts in EnterpriseOne Demand Management, you can use EnterpriseOne Supply Chain Business Modeler to transfer the plans to another EnterpriseOne Supply Chain Planning system for further refinement or to a EnterpriseOne Supply Chain Management system for further refinement or implementation.

EnterpriseOne Supply Chain Management Systems

EnterpriseOne Supply Chain Management systems, such as Enterprise Supply Chain Management, EnterpriseOne Supply Chain Management, and World Manufacturing Management, provide EnterpriseOne Supply Chain Business Modeler with the supply chain data that EnterpriseOne Demand Management uses to generate accurate forecasts. The data includes information about items, branches, inventory policies, and manufacturing processes.

After EnterpriseOne Demand Management creates optimal forecasts using the data, you can transfer the forecasts through EnterpriseOne Supply Chain Business Modeler to a EnterpriseOne Supply Chain Management system for further refinement or implementation.

EnterpriseOne Sales and Operations Planning

Using EnterpriseOne Supply Chain Business Modeler, you can transfer supply chain data from EnterpriseOne Demand Management to EnterpriseOne Sales and Operations Planning.

EnterpriseOne Strategic Network Optimization

Using EnterpriseOne Supply Chain Business Modeler, you can transfer demand forecasts from EnterpriseOne Demand Management into EnterpriseOne Strategic Network Optimization. You can then use Strategic Network Optimization to create inventory build targets and sourcing recommendations based on the data.

After creating supply chain plans in EnterpriseOne Strategic Network Optimization, you can use EnterpriseOne Supply Chain Business Modeler to transfer the plans to another EnterpriseOne Supply Chain Planning system for further refinement or to a EnterpriseOne Supply Chain Management system for further refinement or implementation.

EnterpriseOne Production and Distribution Planning

Using EnterpriseOne Supply Chain Business Modeler, you can transfer supply chain plans from EnterpriseOne Demand Management into EnterpriseOne Production and Distribution Planning. You can then use EnterpriseOne Production and Distribution Planning to create net deployment requirements and net production requirements based on the data.

After creating supply chain plans in EnterpriseOne Production and Distribution Planning, you can use EnterpriseOne Supply Chain Business Modeler to transfer the plans to another EnterpriseOne Supply Chain Planning system for further refinement or to a EnterpriseOne Supply Chain Management system for further refinement or implementation.

EnterpriseOne Order Promising

Using EnterpriseOne Supply Chain Business Modeler, you can transfer supply chain data from a EnterpriseOne Supply Chain Management system to create a model in EnterpriseOne Order Promising.

EnterpriseOne Production Scheduling - Discrete and EnterpriseOne Production Scheduling - Process

Using EnterpriseOne Supply Chain Business Modeler, you can transfer supply chain plans from EnterpriseOne Demand Management into EnterpriseOne Production Scheduling - Discrete and EnterpriseOne Production Scheduling - Process. The EnterpriseOne Supply Chain Planning production scheduling applications can then produce optimal production schedules for meeting the production targets.

Supplemental information about third-party application integrations is located on the EnterpriseOne Customer Connection website.

EnterpriseOne Demand Management Implementation

The EnterpriseOne Demand Management implementation process can be divided into the following steps:

- Installing EnterpriseOne Demand Management.
- Importing data into EnterpriseOne Demand Management.

- Creating a demand model.
- Adding forecast versions and assigning permissions.
- Importing products, locations, and channels into a demand model.
- Reviewing forecast data.
- Managing exceptions.
- Disaggregating the forecast.
- Reconciling the forecast.

Installing EnterpriseOne Demand Management

Step	Reference
Install EnterpriseOne Demand Management.	Installation Guide.

Importing Business Model Data into EnterpriseOne Demand Management

Step	Reference
Import data.	"Importing and Exporting Data", *Design Studio Implementation Guide*.

Creating a Demand Model

Step	Reference
Create a demand model.	"Creating a Demand Model", *Design Studio Implementation Guide*.

Adding Forecast Versions and Assigning Permissions

Step	Reference
Add a forecast version.	"Working with Forecast Versions", Adding a Forecast Version, *Design Studio Implementation Guide*.

Importing Products, Locations, and Channels into a Demand Model

Step	Reference
Import products.	"Introducing New Products into Demand Points", "Importing Products", *Design Studio Implementation Guide*.
Import locations.	"Introducing New Products into Demand Points", "Importing Locations", *Design Studio Implementation Guide*.

Step	Reference
Import channels.	"Introducing New Products into Demand Points", "Importing Channels", *Design Studio Implementation Guide*.
Identify new demand points.	"Introducing New Products into Demand Points", "Identifying New Demand Points", *Design Studio Implementation Guide*.

Reviewing Forecast Data

Step	Reference
Add your name to the review list.	"Reviewing Forecast Data", "Adding Your User Name to the Review List", *Consensus Conference Room Implementation Guide*.
Email or message other Consensus Conference Room users.	"Reviewing Forecast Data", "Emailing Other Stakeholders from Within the Consensus Conference Room", *Consensus Conference Room Implementation Guide*. "Reviewing Forecast Data", "Messaging Another Consensus Conference Room User", *Consensus Conference Room Implementation Guide*.

Managing Exceptions

Step	Reference
Create an exception report.	"Managing by Exception", "Adding an Exception Report Using the Exception Report Wizard", *Consensus Conference Room Implementation Guide*.
View the exceptions.	"Managing by Exception", "View Exceptions", *Consensus Conference Room Implementation Guide*.

Disaggregating the Forecast

Step	Reference
Set the disaggregation options.	"Working with Forecast Data in the Workshop", "Setting the Options for Disaggregation", *Consensus Conference Room Implementation Guide*.
Disaggregate the forecast.	"Working with Forecast Data in the Workshop", "Disaggregating Forecast Data", *Consensus Conference Room Implementation Guide*.

Reconciling the Forecast

Step	Reference
Set the parameters to reconcile the forecast.	"Reconciliation", "Setting Up Reconciliation Parameters", *Consensus Conference Room Implementation Guide*.
Generate a reconciled forecast.	"Reconciliation", "Generating a Reconciled Forecast", *Consensus Conference Room Implementation Guide*.

See Also

About This Documentation, "About This Documentation Preface""About This Documentation Preface," page xi

CHAPTER 2

Understanding the Consensus Conference Room

This chapter provides an overview of the Consensus Conference Room and discusses the Consensus Conference Room user interface.

Consensus Conference Room Overview

Before stakeholders can use the Consensus Conference Room, the administrator must start the Forecast Server and the Batch Server.

The Forecast Server communicates between the Consensus Conference Room and the Object Database. The Forecast Server is connected to one demand model in the database at a time. Multiple forecast servers can be run on different communication ports in order to spread the handling of requests across processes and not overburden any single forecast server.

The Batch Server manages large amounts of forecast data, handles queuing and calculation of long jobs without affecting other applications.

Note. When you start the servers, the system opens a console window and runs a script. Do not close the window.

Once the servers are started, you can log in to the Consensus Conference Room from the Start menu of your computer. Logging out of the Consensus Conference Room occurs within the application menu.

A centrally located Web page allows users to log in to the Consensus Conference Room at any time or at any location, provided they have fulfilled all of the system requirements and have access permissions. If you log in to the Consensus Conference Room and a period of time lapses before any activity occurs, you are automatically logged out and you need to login again. Also, if you bookmark a Web page for easy access later on, you cannot access that page without first entering your login information.

If you cannot log in to the Consensus Conference Room, contact your Consensus Conference Room system administrator.

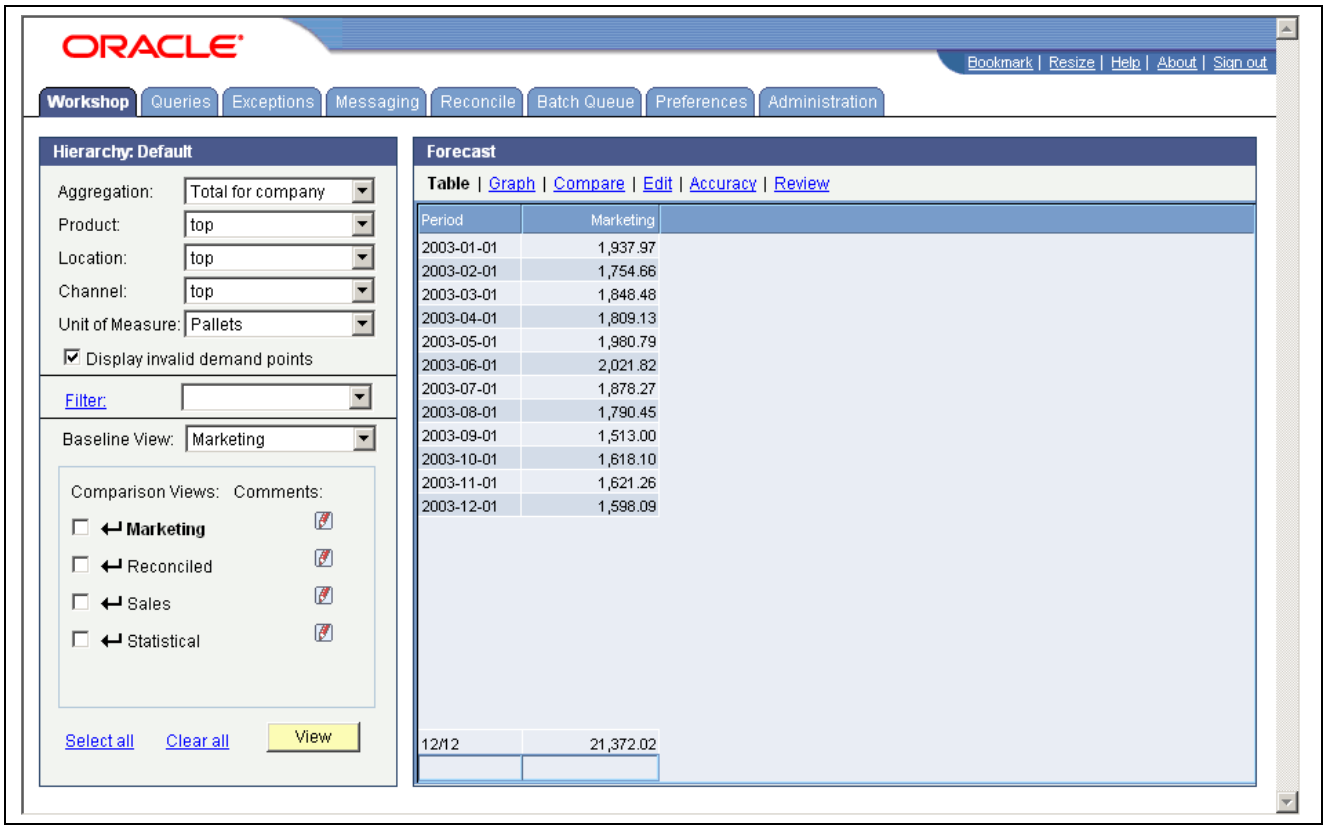
Initially, the Demand Management system administrator configures your account permissions, but you can:

- Modify your user profile settings on the My Account page.
- Change your password on the My Account page.

Alternately, if you have access to the machine that Demand Management is installed on, you can change your account permissions, including your password, by accessing the User Manager application.

Consensus Conference Room User Interface

This screen shows the components of the Consensus Conference Room user interface:



Consensus Conference Room User Interface

This table describes the various components of the Consensus Conference Room interface:

Component	Description
Bookmark	Allows users to create a bookmark to a page.
Resize	Provides two sizes for viewing the page.
Help	Provides documentation about features and tasks.
About	Displays product version information and patch history.
Sign out	Closes the active page and returns to the login screen.
Consensus Conference Room Main menu tabs	Provides access to all of the Consensus Conference Room functions.
Select View	Provides access to available forecast versions and annotations.
Workshop	Provides access to forecast data, navigation tools and the Workshop submenu.

Component	Description
Workshop Submenu	Provides table, graph, compare, edit, review and print functions.
Forecast	Displays forecast data for selected forecast versions.
Unit of Measure	Displays the current unit of measure.
Filter Bar	Filters data in a column.
Sum Bar	Calculates totals of items that appear in a column.
Default	Displays how data was aggregated for the current demand point.
Demand Point	Selects one of each product, location, and channel in the aggregation hierarchy structure.

Consensus Conference Room Main Menu

The Consensus Conference Room Main menu provides access to all of the Consensus Conference Room functions. You can access features and commands by clicking among the categories in the menu.

Workshop Submenu

This table describes the various views that are available from the Workshop submenu:

View	Description
Table	Displays a tabular view of the selected forecast data.
Graph	Displays a chart of the selected forecast data.
Compare	Displays the selected forecast data in a comparison table. Displays the percentage difference between different forecast versions. From this view you can print an Enterprise Forecast Report.
Edit	Displays the Edit page. From this page, you can modify and fix demand point quantities.
Accuracy	Displays the selected forecast data in a comparison table, as well as the percentage difference between forecast data. From this view you can print an Enterprise Forecast Report.
Review	Displays the Review page, where you can read and review specific demand point forecast data.

Forecast

The Forecast area of the Workshop page displays forecast data for specific forecast versions. Using the submenu, you can select among tabular, graphical, and comparative views to review forecast data. You can edit forecast data and review data for other forecast versions. You can also compare accuracy between forecast versions and sales history data.

Sum Bar

The Sum Bar appears at the bottom of the table in both table and compare modes. It adds the value of each item in the column and shows the sum at the bottom of the column in the sum field. For example, suppose that the time bucket measurement is in months. Under the time series column, the number of monthly time bucket units is added together, and the total number (12, one for each month) appears at the bottom in the sum field.

This feature is useful when you need to compare the total units of measure between forecast versions. The total number for the units that are shown in the Sum Bar is useful because it reveals whether user data is similar or dramatically different. The Sum Bar does not total Percentage columns.

Filter Bar

The Filter Bar appears at the bottom of the table below the Sum Bar. The Filter Bar allows you to specify criteria by which to filter data.

Select View

The Select view provides you with a list of forecast versions that hold forecast data for different users. You can select one or more forecast versions depending upon the number of forecast versions to which you have read- and write-access. The forecast version that is displayed in the drop-down list is the baseline forecast version to which other forecast versions are compared, which provides a baseline for comparison. In the Select view you can add comments about the select demand point display.

Baseline View

The forecast version that is displayed in the drop-down list is the baseline forecast version to which other forecast versions are compared.

Forecast Version

A forecast version is a copy of the business model that contains specific forecast data that you and other stakeholders can use to view, compare, and upload forecast data. Depending upon the permissions that are granted, the stakeholder can read, write, and reconcile data into a forecast version in the Select view.

You can view forecast data for a forecast version using one of the Workshop submenu table modes:

- Table
- Compare
- Edit
- Accuracy
- Review

For each table view, each column in the table represents a different forecast version. From the list of list of forecast versions in the Select view, the baseline forecast version always displays first. If you are viewing data data in the Demand Point Accuracy View, the sales history displays first in the table.

At the top of the graph, the name of each forecast version appears, and beside each name is a box that contains a specific color that identifies that forecast version. The color in the box matches the color of the line in the graph window. By clicking the name of the forecast version at the top of the graph, you can highlight the corresponding line in the Forecast. All values for the corresponding graph appear when rolling the pointer over the forecast version name.

The Select View contains an icon for comments that, when clicked, provides space for commenting about the select demand point displayed.

See Also

Using the Filter Bar

Unit of Measure

The Unit of Measure component displays the currently selected unit of measure used in the business model. All other available units of measure appear in the drop-down list.

Demand Point

The demand point component allows you to select a demand point by specifying the product, location, and channel for the selected aggregation level in the aggregation hierarchy.

Default Level

The Default level displays the granularity of forecast data for the current demand point. It indicates how the data is aggregated along the demand point dimension.

CHAPTER 3

Working with the Consensus Conference Room

This chapter discusses how to:

- Start and stop the Forecast Server.
- Start and stop the Batch Server.
- Log into the Consensus Conference Room.
- Change your account permissions.
- Customize table and graph modes.
- Select the unit of measure.
- Select a forecast version from the select view.

Starting the Forecast Server

To start the forecast server, do one of the following:

- In UNIX, at the command line prompt type this command:

  path/common/start/run_dm_start_forecast_server

  Where *path* is the directory path where the application is installed (for example, */opt/SCP/8.12.1/)*.
- In Windows, click the Start button and select Programs, EnterpriseOne Supply Chain Planning 8.12.1, Demand Management, Start Forecast Server.

Note. If the demand model does not contain any business models, the StartForecastServer command fails.

Starting the Batch Server

To start the batch server, do one of the following:

- In UNIX, type this command at the command line prompt:

  path/common/start/run_dm_start_batch_server

  Where *path* is the directory path where the application is installed (for example, */opt/SCP/8.12.1/*).
- In Windows, click the Start button and select Programs, EnterpriseOne Supply Chain Planning 8.12.1, Demand Management, Start Batch Server.

Stopping the Forecast Server

To stop the forecast server, do one of the following:

- In UNIX, type this command at the command line prompt:

  path/common/start/run_dm_stop_forecast_server

  Where *path* is the directory path in which the application is installed (for example, */opt/SCP/8.12.1/*).
- In Windows, click the Start button and select Programs, EnterpriseOne Supply Chain Planning 8.12.1, Demand Management, Stop Forecast Server.

Stopping the Batch Server

To stop the batch server:

1. Do one of the following:
2. In UNIX, type this command at the command line prompt:

   path/common/start/run_dm_stop_batch_server

   Where *path* is the directory path in which the application is installed (for example */opt/SCP/8.12.1/*).
3. In Windows, click the Start button and select Programs, EnterpriseOne Supply Chain Planning 8.12.1, Demand Management, Stop Batch Server.
4. Type your user name and press Enter.
5. Type your password and press Enter.
6. Select one of the domains for which you want to stop the Batch Server, and then press Enter:
   - Demand Consensus.
   - Demand Forecast.
   - Demand Consensus and Demand Forecasting.

Logging In to the Consensus Conference Room

To log in to the Consensus Conference Room:

1. In your Web browser's address bar, type the URL that is supplied by your system administrator.
2. Complete these fields:
   - User ID
   - Password
3. After you log in for the first time, change your password on the My Account page.
4. Click Login.

Changing Your Account Permissions

This sections explains how to:

- Change user profiles.
- Change passwords.

Changing User Profiles

Access the My Account page.

To change your user profile:

1. Complete these fields:
   - Email Address
   - Description
   - Full Name
   - Telephone
   - Mobile
   - Fax
2. Click Update.

Changing Passwords

Access the My Account page.

To change your password:

1. Complete these fields:
   - New Password

     The new password, which must be eight to 16 characters long.
   - Confirm Password

     Re-type the new password.
2. Click Update.

Customizing Table and Graph Modes

Different stakeholders might want to view data in a particular way. To display forecast data in the way in which you want to view it, you can customize the table and graph mode elements to change the view.

Sizing Column Widths

The column widths of individual columns can be adjusted to better display data. Reducing the width of a column allows more columns to be seen at one time. Enlarging the width of a column shows the full content of the column.

To size column widths:

1. Select the line between column headings.
2. Drag the arrow to a new position.

Sorting View Orders

By default, the data in sort view is sorted alphanumerically in ascending order by the contents of the first column. The view can be customized to a different sort order if required.

To sort view orders:

1. Click the heading of the column with data that you want to sort.
2. Click again on the same column heading to return the sort order to its original ascending order.

To compare multiple forecasts:

1. Select a forecast version that you want to view from the Baseline View.
2. Select all of the forecast versions that you want to view by choosing the option that is next to the forecast version.
3. Click the View button.

Using the Filter Bar

Tables in the Consensus Conference Room can contain large amounts of forecast data. Filtering this data using selected criteria is helpful. The filter bar uses several different criteria to filter data in table or compare mode. When highlighting a row that contains dates and numbers in the table, these same values also appear in the filter bar. You can filter a column by entering a date or value in the filter bar. All of the values that match the value in the filter bar appear in the table column. For example, if you highlight a row that contains the value 50,000 and click 50000 in the filter bar, all of the values in the column that match 50000 appear. To return to the normal view, click the filter bar again.

Use the command to filter the information that you want to view. For example, under the sales column, if you wanted to see all of the sales figures that are greater than 50,000, you enter the command 50000>.

Note. Always place the filter criteria at the end of the command. For example, type 2000>.

Use these criteria to filter data:

Criteria	Function
>	Lists any value that is greater than the value that you specify.
>=	Lists any value that is greater than and equal to the value that you specified.

Criteria	Function
<	Lists any value that is less than the value that you specified.
< =	Lists any value that is less than and equal to the value that you specified.
<>	Lists any values that are greater or less than the value that you specified (specify the number on either side outside of the bracket - for example, 5<>).
*	Lists all values that match. For example, 5* returns all of the numbers that start with the number 5.

To filter data in table or compare mode:

1. Select one of these view modes from the submenu:
   - Table
   - Compare
2. In the Forecast view, click in a cell to highlight a row.
3. Click in the filter bar for the column with the criteria that you want to use to filter the data.

   Note. You must backspace over existing data to enter filter criteria for the column.

4. Enter one of the allowable filter criteria in a filter column.
5. Press Enter.

To turn off filter criterion temporarily, click the filter criterion in the filter bar once.

To remove filter criterion:

1. In the Forecast view, select the filter criterion in the filter bar.
2. Press the backspace key until the criterion has been removed.
3. Press Enter.

Customizing the Graph Mode

You can use the graph scroll bar at the bottom and side of the graph to view data that is outside of the viewable horizon. When data appears outside of the graph window, slide the horizontal scroll bar left along the X-axis of the graph to expose graph data that is hidden. Sliding the vertical scroll bar along the Y-axis of the graph exposes graph data that is above or below the graph window.

See Also

Viewing Forecast Data in Compare View

Selecting Workshop Parameters for Time Series Data

Time series data is represented by values situated during a particular period or points in time. The Consensus Conference Room displays several different types of times series data:

- Historical Forecast

  As the horizon is advanced, forecast values are stored as forecast history for an associated stakeholder forecast version. The historical forecast is compared to the actual Sales History to determine the accuracy of the forecast. This forecast can be viewed in the Graph view.

  The accuracy view displays the percentage difference between stakeholder forecasts and actual sales.

- Sales History

  Sales history is used to generate statistical forecasts and to determine forecast accuracy by comparing historical data with forecast data that is projected for the future.

- Effective Dating

  Effective dates indicate when demand points are available or unavailable in the forecasting process. Knowing the effective start and end dates helps to assure demand planners that forecasting data is valid.

By configuring these parameters, you can view and edit the time series data:

- Unit of measure
- Forecast version
- Aggregation levels default level
- Demand point

See Also

Creating Forecast Versions, *Design Studio Implementation Guide*

Selecting the Unit of Measure

Different company areas track products by using different measuring schema. For example, the marketing department might compile forecast data using dollars, while the sales department might compile forecast data using pallets as a unit of measure. To compare both sales and marketing forecast data, one common unit of measure must be chosen.

If several forecast versions contain data that is displayed in different units of measure, the data cannot be compared. The system will convert values to the same base unit of measure to enable comparison of values. Unit of measure conversion occurs at the lowest aggregation level in the demand model. Changes to forecast data that is in any unit of measure at the lowest aggregation levels are propagated to forecast data in all units; they are then aggregated to higher levels in the aggregation hierarchy.

To compare forecast data that is at the same level of aggregation, you must select a common unit of measure that other forecast versions are also using. Data must be aggregated to the lowest level for Demand Consensus to convert unit of measure values to one value.

To select the unit of measure:

Select the unit of measure with which you want to compare data from the Unit of Measure drop-down list.

Selecting a Forecast Version from the Select View

A forecast version is a copy of the business model that contains specific forecast data that you and other stakeholders can use to view, compare, and upload forecast data. Depending upon the permissions that are granted, the stakeholder can read, write, and reconcile data into a forecast version. Some stakeholders might not want to share sensitive forecast data with other stakeholders in the Consensus Conference Room.

In the Consensus Conference Room, the Select view contains all of the forecast versions that you have read access to in the Consensus Conference Room. The forecast version that appears in the drop-down list is called the Baseline view. This forecast version is used to as a benchmark to compare all other forecast version data.

The system administrator creates a secure environment in the Consensus Conference Room by setting permissions for all users, user forecast versions, and their associated demand points. If you do not have the permissions to view, edit, or reconcile a particular demand point, this message appears in the Consensus Conference Room:

Warning message indicating that the user does not have forecast permissions

Selecting the Baseline View Forecast Version

Depending upon the permissions that are granted to you by the system administrator, you can view your own forecast version and at least one other forecast version. If multiple forecast versions are available to you in the Select view, you can select which forecast version is the baseline for comparison with all other forecast versions.

Changing the baseline forecast version allows you to use different forecast versions as the benchmark for forecast data comparison. This ability provides you with different perspectives on the forecast data.

Note. Only use the forecast version that is assigned to you as the baseline forecast version for editing data into the Consensus Conference Room.

To select the baseline view forecast version:

1. Select the name of the forecast version that you want as the baseline forecast version from the drop-down list in the Select View.
2. Click View.

Forecast Version Status

Each forecast version contains specific forecast data values for which a stakeholders has permissions. During the consensus process, forecast data values can change from their original values either by a system process, such as disaggregation, or by a manual intervention, such as when a user edits a specific forecast value in the aggregation hierarchy. When forecast data values change in a forecast version, the system places a status symbol next to the name of the forecast version. This table describes the various status symbols:

Symbol	Description	
ICON	Saved	Forecasts become saved when a forecast provider undertakes one of these actions: • Types a forecast value directly into the Edit page. • Uploads data into the database using the Excel Client Saved forecast data does not change when lower-level forecast values are changed.
ICON	Disaggregated	When a forecast provider saves forecast data, and disaggregates the forecast data, the values below the change are disaggregated.
ICON	Aggregated	When forecast data has a status of aggregated, forecast values are calculated from the sum of the forecast values at lower aggregation levels. If any of the child forecast values change, then the aggregated forecast also changes.

To select a forecast version:

1. Select one of the sub-menu choices.
2. Click the option beside the forecast version name for which you want to view data.

   Alternatively, you can select all of the forecast versions by clicking Select all.
3. Click View.

To deselect a forecast version:

1. Select one of the sub-menu choices.
2. Click the option beside the forecast version name that you want to deselect.

   Alternatively, you can deselect all of the selected forecast version by clicking Clear all.
3. Click View.

CHAPTER 4

Working with Filters

This chapter provides an overview of filters and discusses how to:

- Work with filters
- Create custom filters.
- Use filter permissions.

Understanding Filters

Filters can be created and applied to the product, location, and channel drop-down lists in the Workspace page. Filters can be very useful when a model contains many product, channel, and location elements because they allow you to define which values are displayed and which are hidden in these drop-down lists. Filters are user-based and can only be applied by those who have the appropriate access rights. A filter is applied regardless of the current aggregation hierarchy level at which you are browsing. For example, if you create a filter to view North American locations, you will only see North American countries at the country level and North American regions at the region level.

Working with Filters

This section discusses how to:

- Create and save filters.
- Apply and unapply filters.
- Edit filters.
- Rename filters.
- Delete filters.

Windows Used to Work with Filters

Form Name	Navigation	Usage
Filters	Select the Filters link in the Workspace page.	Select a filter to edit, rename or delete.
Search	In the Filter drop-down list, select (Custom...). You can also access the Search window by clicking the New button or the Edit button in the Filters window.	Create filters or edit the rules in existing filters.

Creating and Saving Filters

Access the Filters window.

To create and save a filter:

1. Click the New button.
2. To add a new product rule, click the + Add Product Rule button.

   A new product rule is created, and all of the Product properties defined in the model are populated in the drop-down list on the left.
3. In the drop-down list on the left, select a Product property.
4. In the drop-down list on the right, select one of the following:
   - is equal to
   - is not equal to
   - contains
   - does not contain
5. In the blank field, enter a property value. If you click the icon to the right of this field, a list of all available property values is displayed.
6. Click the + icon to add an OR statement to the product rule.
7. Click the + Add Product Rule button to add an AND statement to the product rule.
8. To add a new location rule, click the + Add Location Rule button.

   A new location rule is created, and all of the Location properties defined in the model are populated in the drop-down list on the left.
9. In the drop-down list on the left, select a Location property.
10. In the drop-down list on the right, select one of the following:
    - is equal to
    - is not equal to
    - contains
    - does not contain

11. In the blank field, enter a location value. If you click the icon to the right of this field, a list of all available location values is displayed.
12. Click the + icon to add an OR statement to the location rule.
13. Click the + Add Location Rule button to add an AND statement to the location rule.
14. To add a new channel rule, click the + Add Channel Rule button.

    A new channel rule is created, and all of the Channel properties defined in the model are populated in the drop-down list on the left.
15. In the drop-down list on the left, select a Channel property.
16. In the drop-down list on the right, select one of the following:
    - is equal to
    - is not equal to
    - contains
    - does not contain
17. In the blank field, enter a channel value. If you click the icon to the right of this field, a list of all available channel values is displayed.
18. Click the + icon to add an OR statement to the channel rule.
19. Click the + Add Channel Rule button to add an AND statement to the channel rule.
20. In the Filter Name field, enter a name for the filter.
21. Click the Add Filter button.

Applying and Unapplying Filters

Access either the Scenarios workspace or the Forecast workspace.

All the filters that you have the right to apply are listed in the Filters drop-down list. To apply a filter, select it from the Filter drop-down list.

Note. After you apply a filter, the data that is displayed in the main Forecast Studio workspace does not change. What changes are the lists of items displayed in the Product, Location, and Channel drop-down lists, which depends on the filter parameters that have been specified in the selected filter.

To apply a different filter, select a different filter in the Filter drop-down list.

To remove a filter:

1. Click the Filter drop-down list button.
2. Instead of selecting a filter, select the blank line above the (Custom...) filter.

   This removes all filters. The Product, Location, and Channel drop-down lists are repopulated with all items in those categories.

See Also

Using Filter Permissions

Deleting Filters

Editing Filters

Access the Filters window.

To edit filters:

1. In the Filter Names list, select the filter that you want to edit.
2. Click the Edit button.

   The Search window is displayed.
3. Make the appropriate changes to the filter in the Search window.
4. Close the Search window by clicking the OK button.
5. Select another filter to edit, or click the Close button.

Renaming Filters

Access the Filters window.

To rename filters:

1. In the Filter Names list, select the filter that you want to rename.
2. Click the Rename button.
3. Rename the filter in the Filter Names list.
4. Click Enter on the keyboard.
5. Select another filter to rename, or click the Close button.

Note. Since filters can be made available globally, filter names must be unique in a demand model.

Deleting Filters

Access the Filters window.

To delete a filter:

1. In the Filter Names list, select the filter that you want to delete.
2. Click the Delete button.
3. In the confirmation window, click Yes to confirm the deletion.

Creating Custom Filters

Access either the Scenarios workspace or the Forecast workspace.

Custom filters are filters that are not permanent and are not saved when you close out of Forecast Studio. Custom filters can be useful when you want to quickly create and apply a filter.

To create a custom filter:

1. In the Filter drop-down list, select (Custom...)

The Search window is displayed.

2. To add a new product rule, click the + Add Product Rule button.

   A new product rule is created, and all of the Product properties defined in the model are populated in the drop-down list on the left.

3. In the drop-down list on the left, select a Product property.
4. In the drop-down list on the right, select one of the following:
   - is equal to
   - is not equal to
   - contains
   - does not contain
5. In the blank field, enter a property value. If you click the icon to the right of this field, a list of all available property values is displayed.
6. Click the + icon to add an OR statement to the product rule.
7. Click the + Add Product Rule button to add an AND statement to the product rule.
8. To add a new location rule, click the + Add Location Rule button.

   A new location rule is created, and all of the Location properties defined in the model are populated in the drop-down list on the left.

9. In the drop-down list on the left, select a Location property.
10. In the drop-down list on the right, select one of the following:
    - is equal to
    - is not equal to
    - contains
    - does not contain
11. In the blank field, enter a location value. If you click the icon to the right of this field, a list of all available location values is displayed.
12. Click the + icon to add an OR statement to the location rule.
13. Click the + Add Location Rule button to add an AND statement to the location rule.
14. To add a new channel rule, click the + Add Channel Rule button.

    A new channel rule is created, and all of the Channel properties defined in the model are populated in the drop-down list on the left.

15. In the drop-down list on the left, select a Channel property.
16. In the drop-down list on the right, select one of the following:
    - is equal to
    - is not equal to
    - contains
    - does not contain
17. In the blank field, enter a channel value. If you click the icon to the right of this field, a list of all available channel values is displayed.

18. Click the + icon to add an OR statement to the channel rule.
19. Click the + Add Channel Rule button to add an AND statement to the channel rule.
20. Click the Apply Filter button.

    You can save a custom filter by entering a name in the Save as field before clicking the Apply Filter button.

Using Filter Permissions

Before users can apply, edit, or create filters, they must be granted the appropriate rights. These rights apply to specific filters, not all existing filters. Contact your system administrator for more information about filter permissions.

See Also

Granting Access to Filters

CHAPTER 5

Working with Aggregation Hierarchies

This chapter provides an overview of aggregation and discusses how to:

- Work with aggregation hierarchies.
- Select demand points from the aggregation hierarchy.

Understanding Aggregation

Aggregating information allows you to see the total forecast or sales history for a set of demand points in a demand model. Aggregation automatically calculates the value for a demand point by summarizing the associated values from the demand points in the aggregation level immediately below. The values immediately below can be either saved (uploaded - manually edited) or aggregated (system-generated). Drill-down and roll-up operations move down and up, respectively, through the aggregation hierarchy. A user can navigate to more levels of detail by using drill-down operations. Roll-up operations show a summarized level of information.

You can view a single or multiple aggregation hierarchies for the same demand model in the Consensus Conference Room. Different aggregation hierarchies provide a customized view of demand point data that resides at a specific level in the aggregation.

Navigating to Aggregation Levels

Aggregation levels exist with an aggregation hierarchy. Viewing data using different levels of aggregation provides you with a way to view data in a more meaningful way. As a stakeholder, you are concerned with only some of the data contained in the demand model. For example, you might be interested in data for a particular sales region or you might want to view data by product only. Using the aggregation levels you can select which aspects of the demand model you want to view and work with the data at this aggregation level.

Aggregation levels also makes the consensus process easy for stakeholders by providing each user the same view of forecast data. The forecast data held in a forecast version is structured from a high level of aggregation to a low level of aggregation. Those demand points at the high level of aggregation hold little detail, while those demand points at the low level of aggregation hold the most detail.

You can move up and down the aggregation hierarchy to a specific demand point. Moving to a higher level of aggregation reveals the summed value of all of the levels that are below. Moving to a lower level of aggregation reveals the values of the levels below that also create the summed value.

See Also

Viewing Forecast Data in Compare View

Selecting Demand Points

The aggregation hierarchy defines the structure of the demand model. At the lowest level of the hierarchy are demand points (coordinates) for each location where you sell a product into a channel. Higher levels in the aggregation hierarchy are defined by selecting a product level, a location level, and a channel level.

Successively higher aggregation levels are built from successively higher product, location, and channel levels. At each aggregation level, you obtain aggregation points that are at the point where all values from the product, location, and channel levels intersect. (Each level has fewer aggregation points than the one below it). The demand at any aggregation point is calculated by aggregating the demand from the next lower aggregation level.

An aggregation point is a demand point that appears in the aggregation hierarchy. All aggregation points are demand points, but all demand points are not aggregation points. The difference is subtle: an aggregated value can be calculated in many ways, depending on how you define your different hierarchies. The cross product of all points in the product hierarchy, location hierarchy, and channel hierarchy define all of the possible demand points.

For example, a model can contain this data:

- Product: Recreation/Bicycles/Mountain Bikes.
- Location: Canada/Vancouver/Bike Sport 3.
- Channel: Independent.

When the aggregation levels are specified in the Design Studio and saved to the database, you can navigate to this same point in the Consensus Conference Room by using the Default level dialog box. By using the product, location, and channel control, you can show product, location, and channel information for specific demand points.

The combination of product, location, and channel creates a demand point (coordinate) where potential for demand exists. Start at the top of the aggregation hierarchy and follow the path downward until you reach the point that has a unique place within the aggregation hierarchy-in this case, the bottom level.

Note. The slash that appears before any of the product, location, and channel fields acts as a place holder for any folders that are part of the navigation path, but are too long to appear in the field.

Working with Aggregation Hierarchies

This section discusses how to:

- Set the aggregation hierarchy.
- Navigate to an aggregation level.

Windows Used when Working with Aggregation Hierarchies

Form Name	Navigation	Usage
Consensus Conference Room Workshop	Click Hierarchy	Displays the Hierarchy page, which contains details about the aggregation hierarchy in the demand model that you are working with.
Consensus Conference Room Workshop	Click Table	Displays the Table view, which displays a tabular view of the selected forecast data.
Consensus Conference Room Workshop	Click Preferences	Displays the Preferences page, where you can change the viewing and disaggregation options.

Setting the Aggregation Hierarchy

Access the Hierarchy page.

Multiple aggregation hierarchies allow you to access several different views of the entire demand model including a view of only those demand points that you want included in your forecast data. You can set the aggregation hierarchy in the Consensus Conference Room, and then you can view the forecast data for the aggregation hierarchy in the Consensus Conference Room.

To set the aggregation hierarchy:

1. Select the option beside the aggregation hierarchy that you want to view.
2. Click Select.

Navigating to an Aggregation Level

Access the Hierarchy page.

To navigate to an aggregation level, select an aggregation level from the Default level list.

If you are at the top level, you cannot move up a level. If you are at the bottom level, you cannot move down a level.

Selecting Demand Points from the Aggregation Hierarchy

This section explains how to:

- Select an aggregation level from the Default Level list.
- Set display types for demand points.
- Select aggregation levels.
- Select demand points on the current aggregation level

Selecting Aggregation Levels from the Default Level List

To select a demand point in the aggregation hierarchy, specify one of each:

- Product
- Location
- Channel

The system displays data for the aggregation level and demand point that you specified.

If you are at the top level, you cannot move up a level. If you are at the bottom level, you cannot move down a level.

Note. You can view demand points that do not have forecast data by selecting the Display invalid demand points check box in the Workshop page.

Setting Display Types for Demand Points

Access the Preferences page.

To set the display type for demand points:

1. Select Display invalid demand points.

   Demand points that do not have forecast data will display in the Consensus Conference Room as unavailable.
2. Click Set Options.

Selecting Aggregation Levels

To select an aggregation level, select the aggregation level from the Default Level list on the Workshop page. For example, select top/country/business unit.

The corresponding available product, location, and channel appear in the product, location, and channel control lists.

Selecting Demand Points on the Current Aggregation Level

Access the Table view.

To select a demand point on the current aggregation level, select each of these options:

- A product or product group.
- A location or location group.
- A channel or channel group.

Note. You can view demand points that do not have forecast data by setting the Display invalid demand points option in the Option page.

CHAPTER 6

Working with Demand Point Comments

This chapter provides an overview of demand point comments and discusses how to:

- Create demand point comments.
- View demand point comments.

Understanding Demand Point Comments

Demand point comments inform stakeholders about changes, problems, and issues that occur during the consensus process. A stakeholder can navigate to a specific demand point for a particular forecast version and create an entry that contains valuable information. Any stakeholder who has access to a forecast version can view existing information and create new entries.

You can create a comment for any demand point and any forecast version that you can view in the Consensus Conference Room. An entry contains information such as the name of the forecast version, the path, the name of the stakeholder who created the entry, the subject, the date and time, and the message.

Note. You can add or view demand point comments only if you have write or read permissions to specific demand points. Any comments that are added to demand points in the Forecast Studio are visible in the Consensus Conference Room.

See Also

Working with Notes and Comments, *Forecast Studio Implementation Guide*

Creating Demand Point Comments

Select an aggregation level from the default level list.

To create a demand point comment:

1. Navigate to the demand point for which you want to add a comment, and specify each of these options:
   - Product
   - Location
   - Channel
2. Select a forecast version, and click the Comments icon beside the forecast version for which you want to create a comment.

3. Complete these fields:
   - Subject
   - Body
4. Click Add.

Note. This feature does not support HTML in the message or body of this message. The system converts these characters into safe characters when used to create a comment:

< > (angle brackets)

; (semicolon)

(quotation mark)

However, if you type a URL into the body of the message, the system automatically converts it into a link.

Viewing Demand Point Comments

Select the aggregation level from the default level drop-down list.

To view a demand point comment

1. Specify each of the following options:
   - Product
   - Location
   - Channel
2. Click the Comments icon beside the forecast version for which you want to view the comment.

See Also

Working with Effective Dates, *Design Studio Implementation Guide*

CHAPTER 7

Displaying Effective Dates

This chapter provides an overview of effective dates and discusses how to:

- Set the display type for effective dates.
- View demand points with effective dates.

Understanding Effective Dates

Effective dates indicate when demand points are available or unavailable in the forecasting process. Knowing the effective start and end dates of demand points helps you to assure that forecasting dates are valid.

The forecast data that falls before the start effective data is forecast history. The forecast data that postdates the end effective date is new information that is input by stakeholders.

To view effective date periods for demand point data in the Consensus Conference Room, specify whether to display the effective dates in either the Table view or the Graph view. The Table view displays demand points that fall outside of effective dates as highlighted values. The Graph view displays demand points (that fall within effective dates) between two vertical lines.

Setting the Display Type for Effective Dates

Access the Preferences page.

To set the display type for effective dates:

1. Select one or both of these options:
   - Display effective dates in table view
   - Display effective dates in graph view
2. Click Set Options.

Viewing Demand Points with Effective Dates

Select a forecast version from the Select View, and then click View.

To view demand points with effective dates in Table view:

1. From the Default level list, select the aggregation level for the demand point for which you want to view effective dates.
2. Specify each of the following:
   - Product
   - Location
   - Channel
3. Click Table.

See Also

Viewing Forecast Data in Table View

Viewing Demand Points with Effective Dates in Graph View

To view demand points with effective dates in Graph view:

1. From the Default level list, select the aggregation level for the demand point for which you want to view effective dates.
2. Specify each of the following:
   - Product
   - Location
   - Channel
3. Click Graph.

CHAPTER 8

Viewing Time Series Data

This chapter provides an overview of the time series view and discusses how to view forecast data.

Understanding the Time Series View

The Workshop enables you to view, compare, and edit time series data from multiple stakeholders for a specific demand point by using different viewing modes.

To view the time series data, you can select views:

- Table view.
- Graph view.
- Compare view.

The table mode and compare mode have similar interfaces. You can also view data in table format using the accuracy and review tabs.

If you have access to other forecast versions, and data was uploaded by another user to the same demand point, you can view and compare the data by using the view and compare modes, respectively.

When viewing forecast data in the Table view, a time series appears in the first column, followed by selected forecast version data in the preceding columns. Forecast data in table mode shows information about the forecast such as the number of time buckets and values.

If the Baseline forecast version and sales forecast version are selected, the second column contains the Baseline forecast version data, and the third column contains the sales data. If the Baseline forecast version is the only forecast version that is selected, you cannot see any of the other forecast date for any other forecast version.

In some cases, specific units of measure are assigned to demand points. If you access any demand points that contain invalid units of measure, an error message appears.

See Also

Editing and Saving Forecast Data

Viewing Time Series Data

This section discusses how to:

- View forecast data in table view.

- View forecast data in graph view.
- View forecast data in compare view.

Windows Used to View Time Series Data

Form Name	Navigation	Usage
Consensus Conference Room Workshop	Click Table	Displays the Table view, which presents a tabular view of the selected forecast data.
Consensus Conference Room Workshop	Click Graph	Displays the Graph view, which displays a chart of the selected forecast data.
Consensus Conference Room Workshop	Click Compare	Displays the Compare view, which displays the selected forecast data in a comparison table as the percentage difference between different forecast versions.

Viewing Forecast Data in Table View

Access the Table view.

To view time series data in Table view:

1. Select the forecast version that you want to compare.
2. Click Table.

Viewing Forecast Data in Graph View

Access the Graph view.

To view time series data in Graph view:

1. Select the forecast version that you want to compare.
2. Click Graph.

Viewing Forecast Data in Compare View

Access the Compare view.

To select the demand point that you want to view on the current aggregation level

To view forecast data in Compare view:

1. Select the forecast version that you want to compare.
2. Click Compare.

CHAPTER 9

Working with Forecast Data

This chapter provides an overview of forecast data, and discusses how to:

- Work with forecast data.
- Review forecast data.

Understanding Forecast Data

This section discusses:

- Forecast data edits and saves.
- Fixed data points.
- Resetting the data series.
- Forecast disaggregation and balancing.
- Overriding forecast data.
- Reviewing forecast data.

Forecast Data Edits and Saves

When creating an enterprise forecast that is based on collaborative data, adjustments need to be made to some values in the data prior to creating the enterprise forecast. These adjustments are often required due to promotions or exception management.

Use the Edit page to change forecast data by:

- Changing a value for a particular date.
- Clearing forecast data at a specific demand point.
- Fixing data points.
- Saving disaggregated and balanced forecast data to the database.
- Resetting a data series.
- Overriding forecast data.
- Disaggregating forecast data.

Fixed Demand Points

There are times that you may want to lock in or “fix” demand quantities for specific demand points to protect them during balance and disaggregation. For example, you may be providing a set number of promotional items to a customer, and that number will not be changing. Another example would be when you have more demand than you can fulfill due to supply constraints. In this case, you may commit to provide specific quantities to a demand point and need to lock it in.

Note. Fixing demand points should be used sparingly so that you can fully take advantage of the disaggregation and balance capabilities for generating demand forecasts. It is recommended that demand point fixing occur at lower aggregation levels rather than higher ones because fixing makes data editing and model maintenance more restrictive.

To fix demand points, you must first specify that the aggregation hierarchy is “fixable”. Only one aggregation hierarchy in your demand model is fixable at a time and must be set in the Design Studio. If you do not establish the Fixing Hierarchy in the Design Studio, all Fixed check boxes in Workshop Edit page are not selectable. Similarly, if you have set the Fixing Hierarchy and you switch to a different aggregation hierarchy that is not "fixable" in the Preferences tab, all Fixed check boxes are not selectable in the Workshop Edit page.

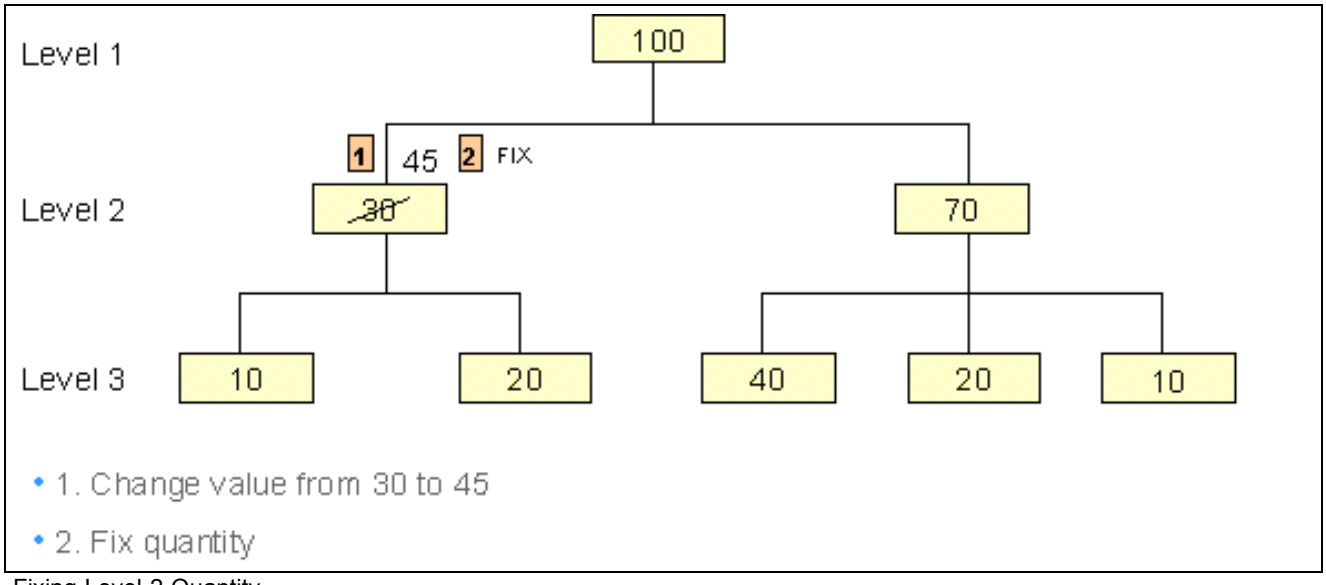
Within the Workshop workspace, you can modify and fix future demand for a hierarchy level. In the preferences, you can specify how disaggregation and balance will proceed considering the fixed demand points. Directly fixed demand points appear in green cells; indirectly fixed demand points appear in red cells. Directly fixed demand points can be unfixed, which has the effect of unfixing any dependent demand points.

Fixing a demand point has a number of implications depending on what hierarchical level is fixed. There are a couple of scenarios detailed below.

Demand fixed at a middle level indirectly fixes the sub-pyramid below

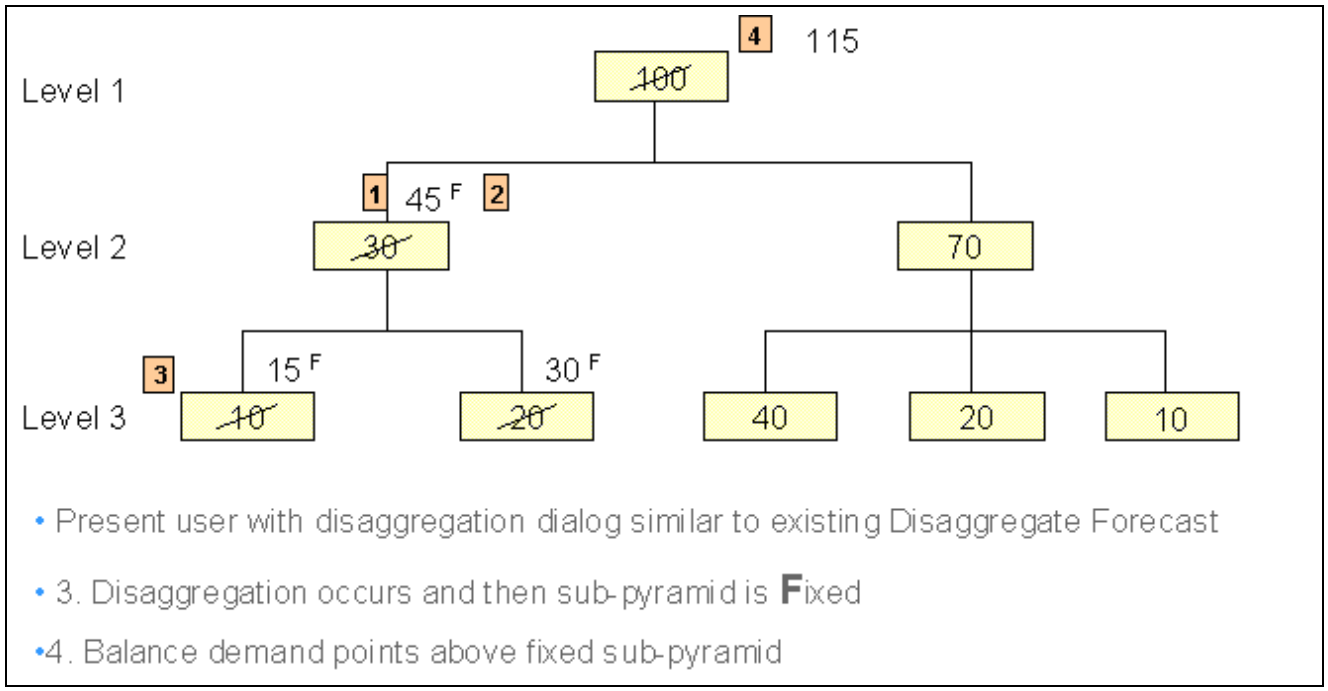
A balanced hierarchy is maintained by fixing demand points below the fixed demand point at the time of fixing. Demand points that are fixed directly are displayed on the screen in green. Demand points that are fixed indirectly are displayed on the screen in red.

For example, in the following example, a quantity above the leaf level is changed form 30 to 45 and fixed.



Fixing Level 2 Quantity

Upon top-down disaggregation, the quantities below the modified demand point change from 10 and 20 to 15 and 30 respectively and become fixed. The parent of the modified demand point is balanced and becomes 115.

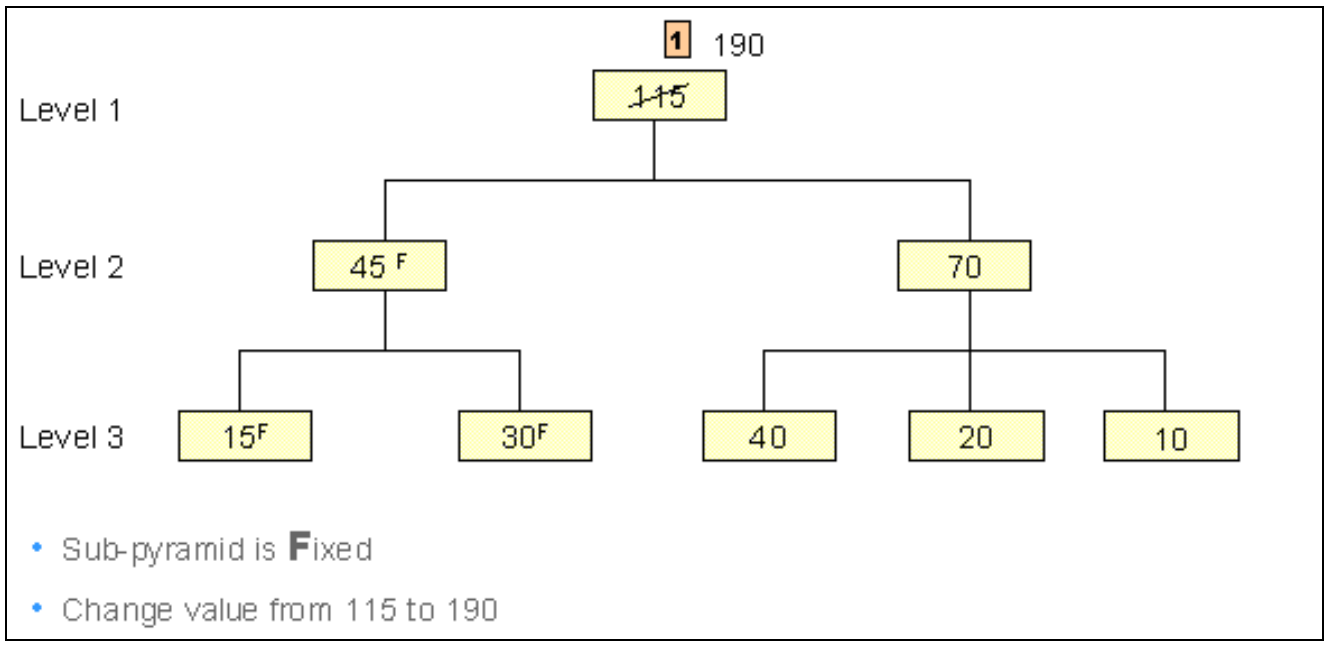


Level 1 Quantity changes to 115

Disaggregating around a fixed demand point

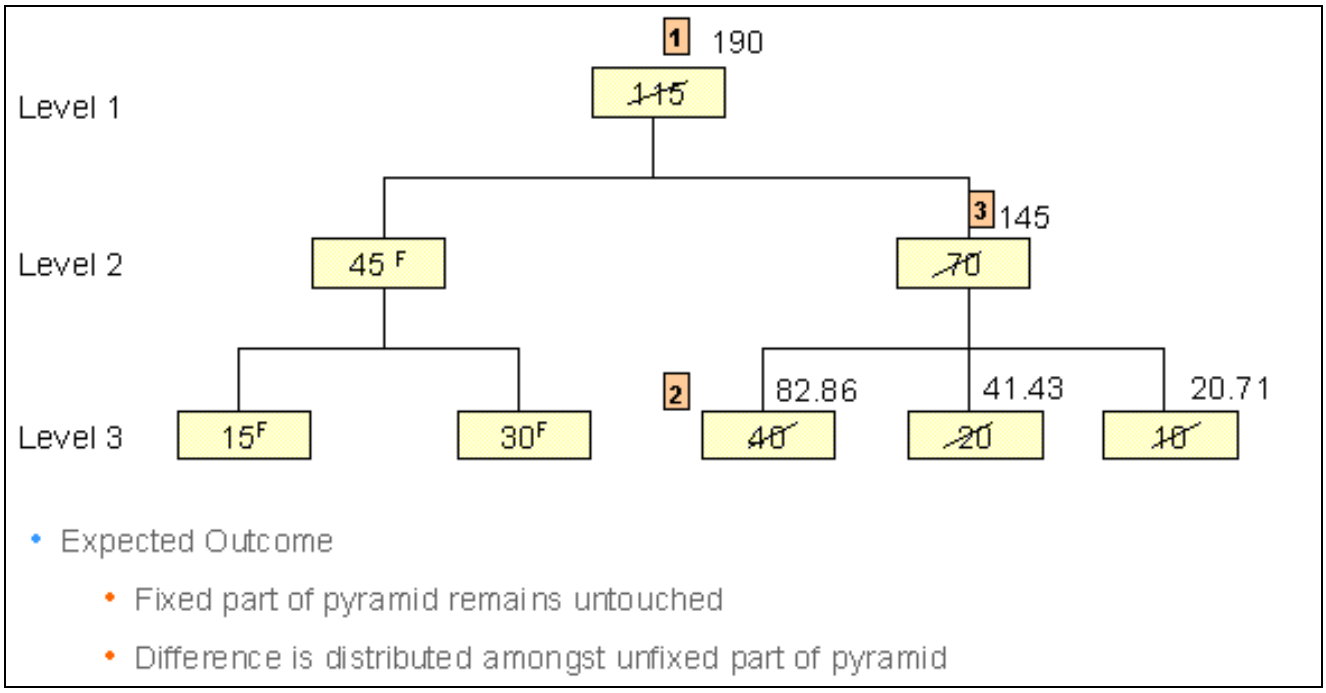
Disaggregation does not modify fixed demand point quantities. Instead, upon disaggregation, changes are made to the unfixed demand points within the same sub-pyramid.

In the following example, the quantity of a demand point was changed to 45 and fixed. The leaf demand points below it are also fixed. The demand point above this fixed point is changed from 115 to 190.



Level 2 and 3 demand points fixed

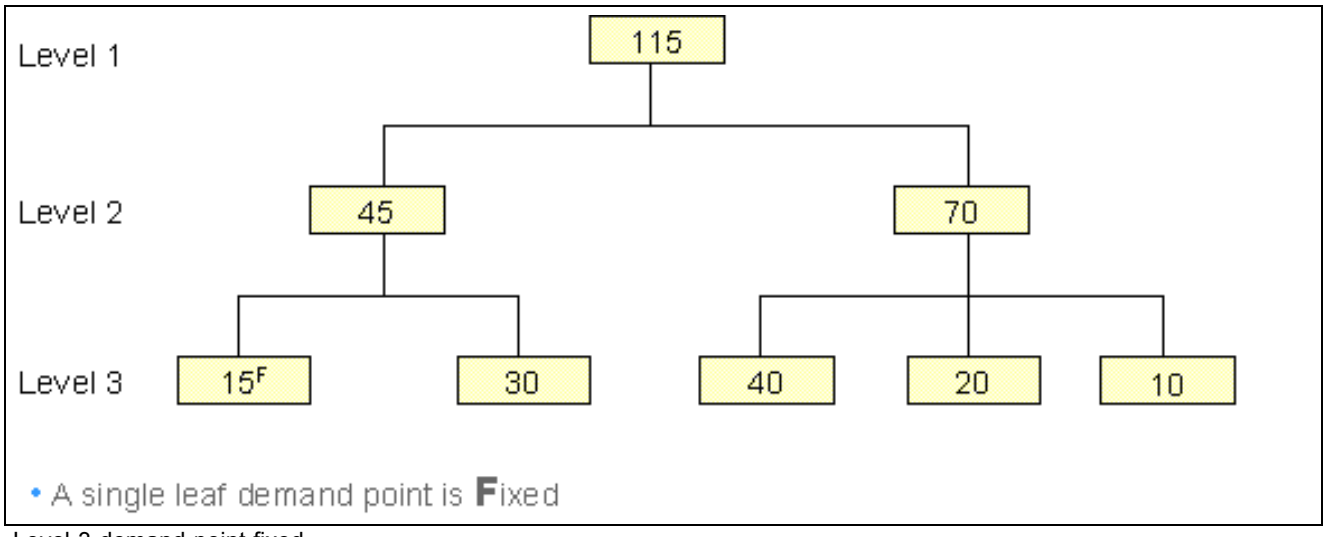
Upon top-down disaggregation, the fixed sub-pyramid remains unchanged and the change allocated to the unfixed demand points below:



Quantities distributed among unfixed demand points

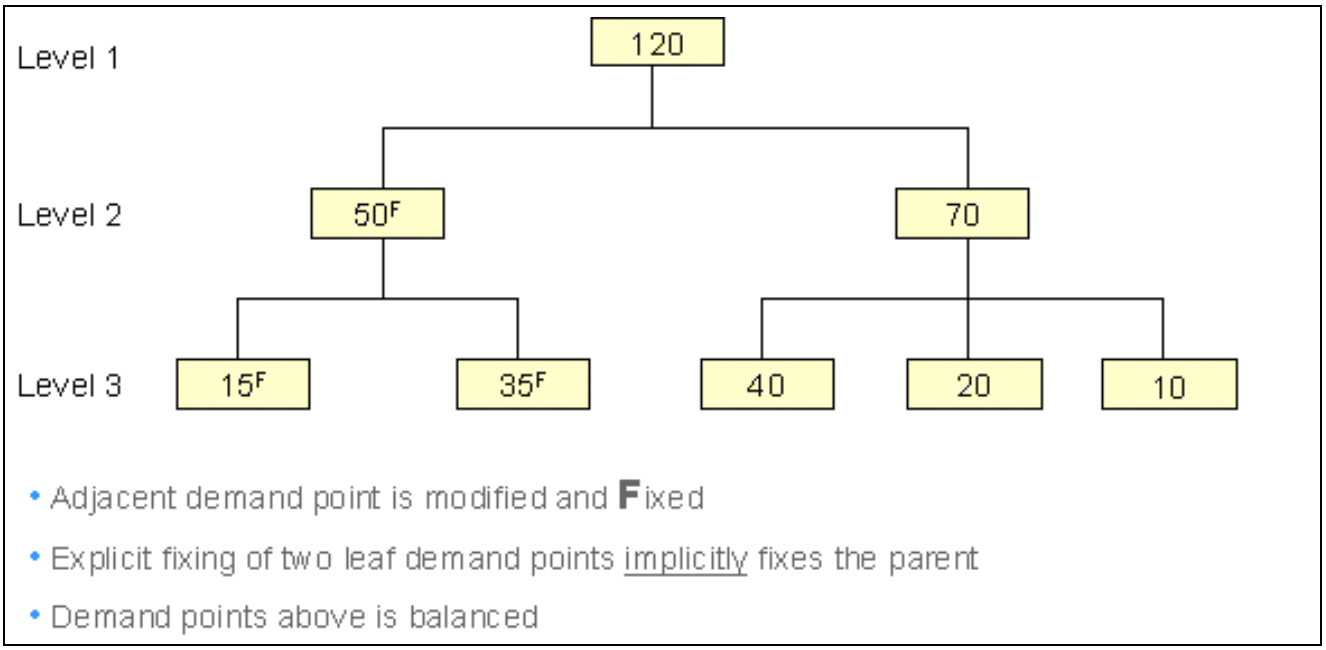
Indirect demand point fixing

Fixing a demand point can potentially cause another demand point to be fixed in another aggregation hierarchy even though only one aggregation hierarchy is "fixable".



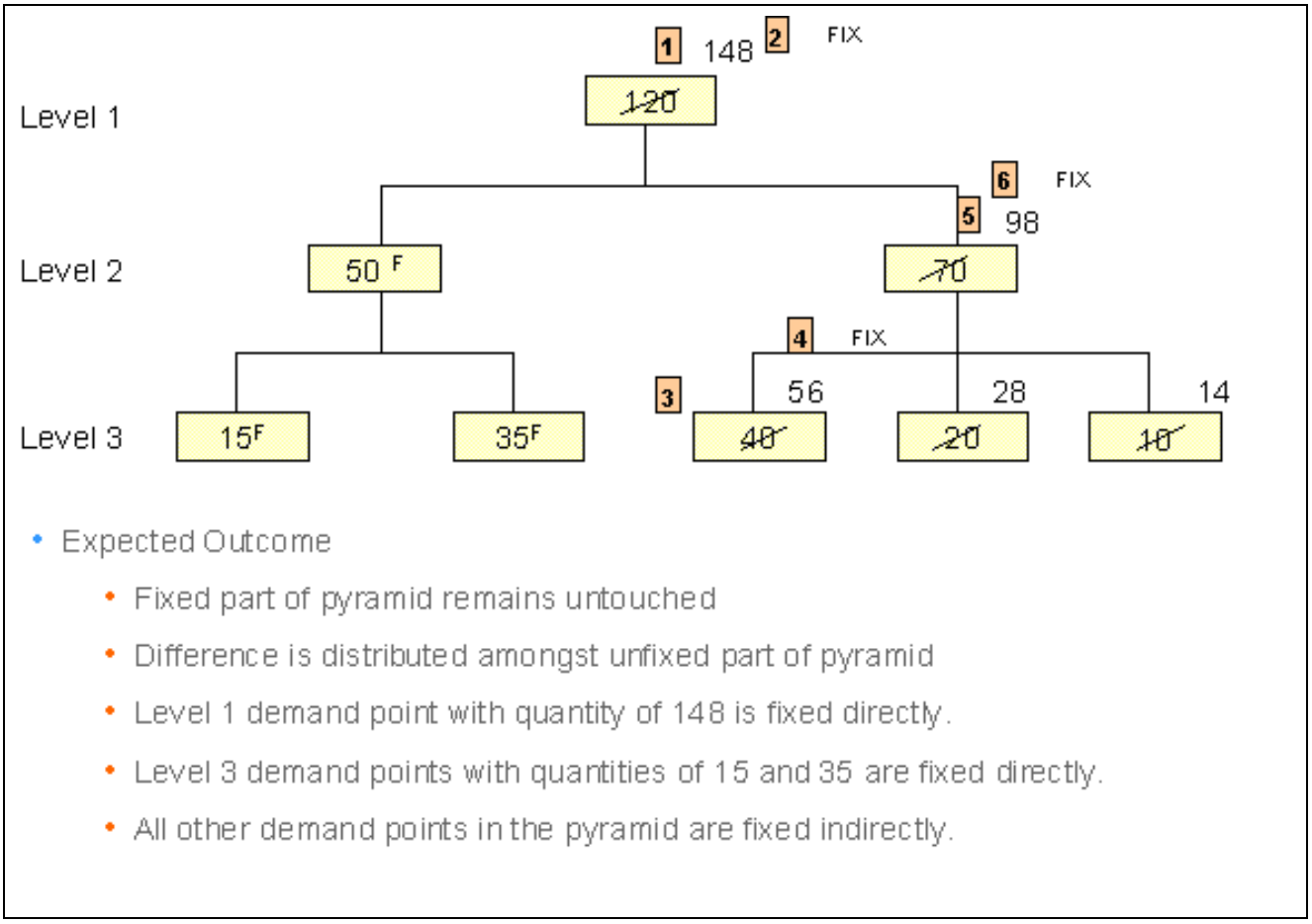
Level 3 demand point fixed

The adjacent demand point is changed from 30 to 35 and fixed. By directly fixing the adjacent demand point, the parent demand point with only these two children becomes fixed indirectly. Prior to fixing the parent indirectly, its quantity is balanced (from 45 to 50).



Second level 3 demand point is fixed, indirectly fixing the level 2 demand point

Using this pyramid, the quantity of 120 at Level 1 is modified from 120 to 148 and fixed. Disaggregation method is bottom-up.

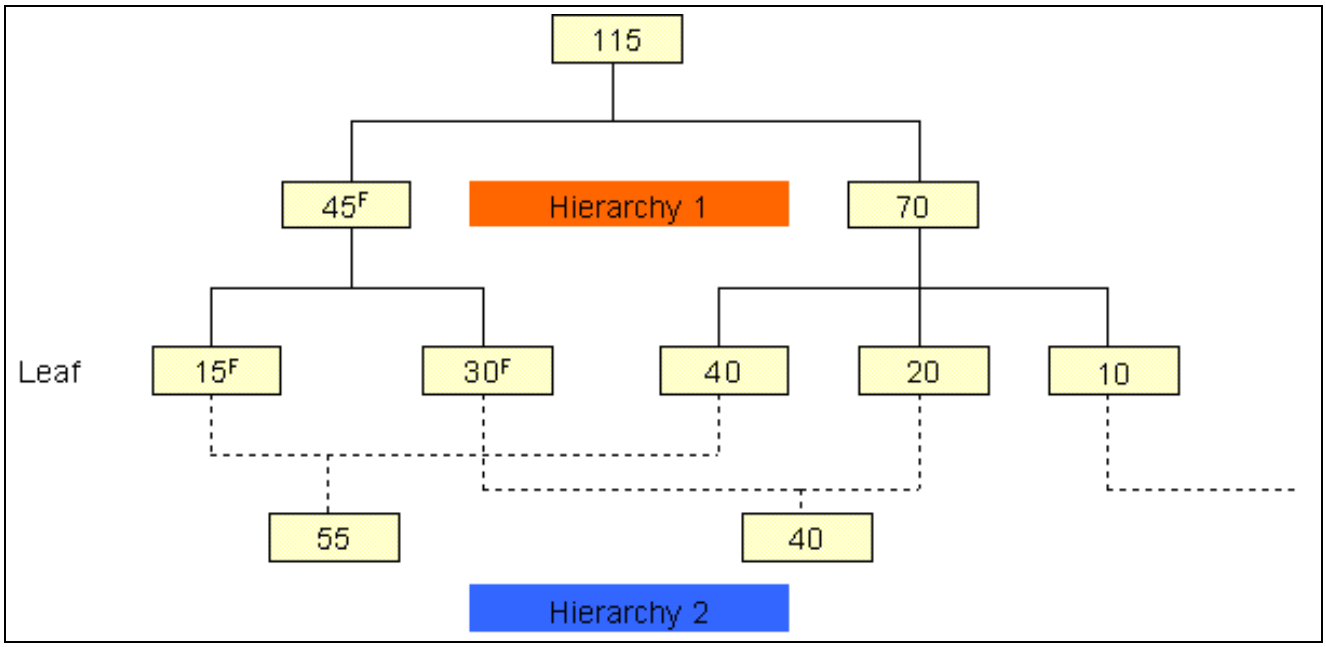


Level 1 fixed in addition to Level 3 and indirectly, Level 2

In the above example, the entire pyramid is fixed where three demand points are fixed directly and all others indirectly.

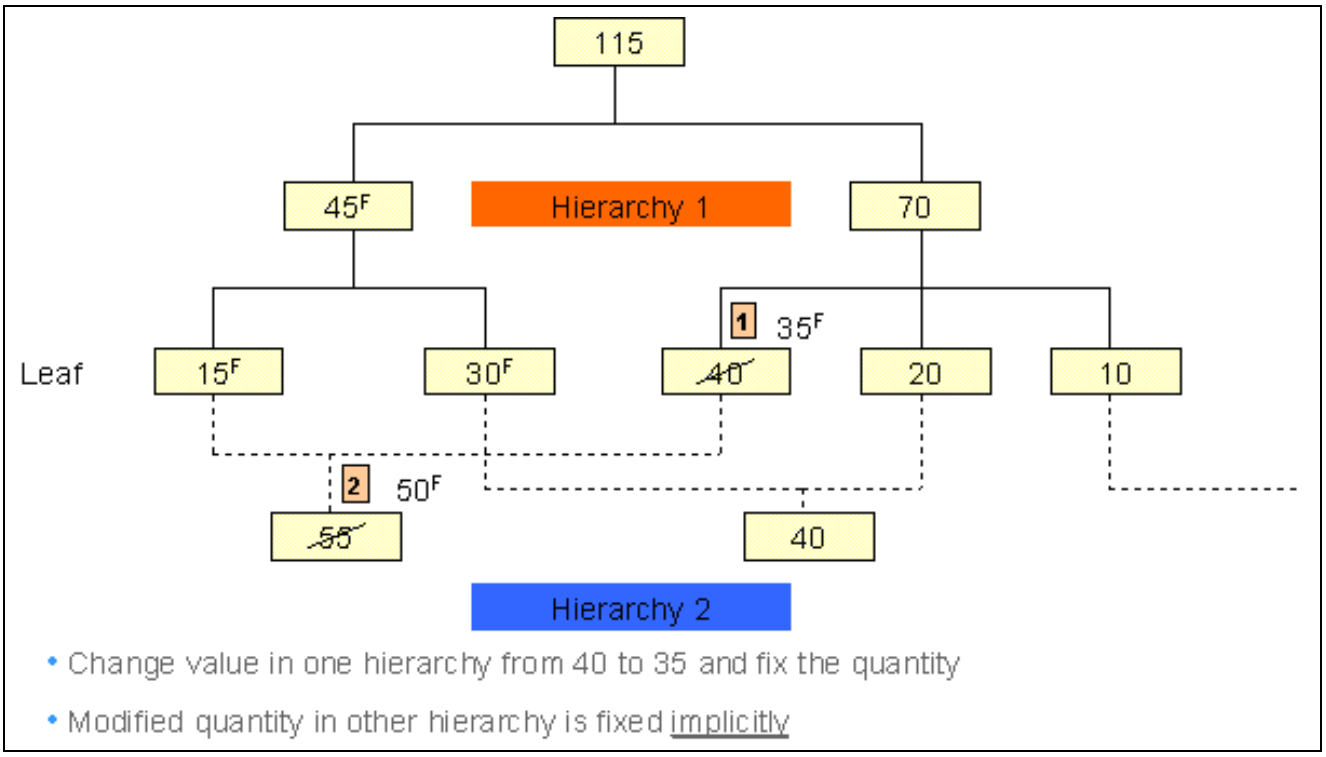
Indirect demand point fixing in multiple hierarchies

Fixing a demand point can potentially cause another demand point to be fixed in another aggregation hierarchy. In the following example, there are two aggregation hierarchies that aggregate differently from the leaf level. There is a fixed sub-pyramid in one hierarchy. The dotted lines represent aggregation levels in the other aggregation hierarchy.



Two aggregation hierarchies

A demand point in the first hierarchy is changed from 40 to 35 and fixed. By directly fixing this demand point, a parent demand point in another aggregation hierarchy becomes fixed indirectly.

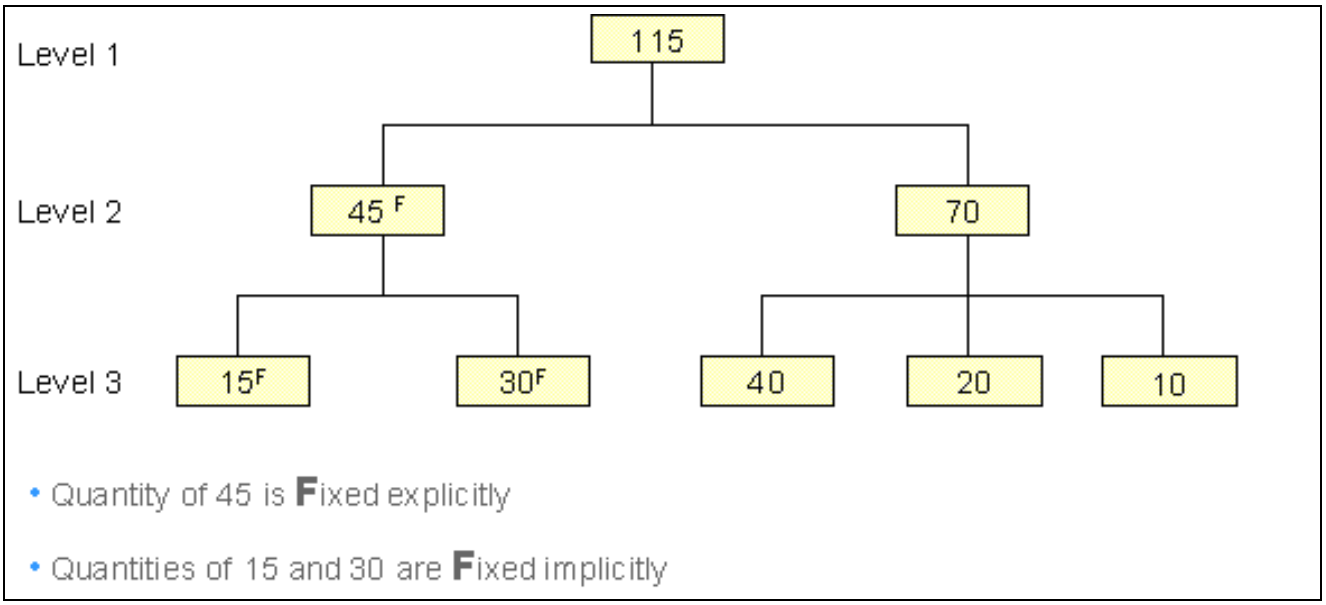


Fixing demand point in one hierarchy indirectly fixes demand points in other hierarchy

Unfixing a fixed demand point

Demand points can be unfixed. Directly fixed demand points can be unfixed directly whereas implicitly fixed demand points cannot be unfixed.

In the following example, there is a fixed sub-pyramid where a demand point with quantity of 45 was fixed in a particular period and its children fixed indirectly. The user wants to increase the quantity from 45 to 60. In order to change the quantity, the user must first unfix the demand point in that period, make the edit and then refix the quantity. Since the demand point was fixed directly, it is possible to unfix the demand point directly, edit, and refix. There is no need for any special user notification.



Level 2 fixed directly, Level 3 fixed indirectly

In the same example, the user wants to adjust the leaf-level quantity from 15 to 30 units instead of revising at the next level up. In this case, the demand point was fixed indirectly as a consequence of the fixing of the demand point at a higher level. When the user tries to unfix the demand point with the quantity of 15, they are unable. If a user does not have access to a demand point that has caused one of their demand points to be fixed indirectly, they will need to notify the user with access to the fixed demand point in order to unfix. Once unfixed, the user can change the volume mix and notify the other user that the changes have been made.

Resetting a Data Series

You can reset your data series back to that found in the database at any time before the data is saved.

Forecast Disaggregation and Balancing

When saving your forecast, Demand Consensus automatically disaggregates and balances your forecast quantities based on your preferences.

Disaggregating forecasts enables you to compare forecast data that was forecasted at a higher level with another user's data that was forecasted at a lower level of abstraction.

You can disaggregate a forecast in three ways:

- Using the system profile.
- Using the current forecast version profile, in top-down mode.
- Using the current forecast version profile, in bottom-up mode.

Disaggregation Using the System Profile

Disaggregating a forecast using the system profile causes the Consensus Conference Room to distribute forecast data upwards according to the underlying pattern in the current forecast version. To perform the disaggregation, the Consensus Conference Room copies leaf demand points from the system profile into the working profile. The values and forecasts in the system profile replace those in the working profile. Only leaf demand points from the system profile are used in disaggregation.

The value in each time bucket adds up to the value of the top-level forecast, and all existing proportions remain intact after disaggregation. These proportions are taken from the system forecast version.

You can disaggregate with the system profile if little or no data is at the lowest level of the current forecast version. In the Consensus Conference Room, the name of the system profile appears in parentheses beside this option.

In addition, any negative values are treated as 0 in the working profile. Negative values retain their original values in the system profile.

Top-Down Disaggregation Using the Current Profile

Top-down disaggregation distributes the forecast data downwards from the highest aggregation level according to the underlying pattern in the current forecast version. The value in each time bucket adds up to the value of the parent forecast.

If there are no forecasts at the lower levels of aggregation, the Consensus Conference Room creates forecasts at those levels and then performs the disaggregation. If some of the demand points at the lower levels have forecasts and others do not, the values being pushed down from the top are split between the demand points that have forecasts. The demand points without forecasts are ignored.

All fixed points beneath the top level are overwritten, except for leaf demand points. If there are missing values, then the top value is evenly distributed at the lowest level. In addition, missing values at the lowest level of aggregation are ignored.

Depending on the quality of your data, however, disaggregation may not work exactly in this manner. Several special cases can affect results, including these:

- When the parent forecast has a missing value in a time bucket, this value is forced downwards to all children regardless of the values that they previously had.
- If all children in a particular bucket have a value of 0, the value of the parent forecast is distributed evenly among them.
- All missing values are considered missing as long as at least one value in the pyramid is greater than 0.
- If all values below the parent forecast are missing, then the Consensus Conference Room registers them as missing.
- Negative values are treated as 0.
- If some child demand points have missing values and others have data, the Consensus Conference Room only disaggregates the demand points that contain data.

Bottom-Up Disaggregation Using the Current Profile

Bottom-up disaggregation distributes forecast data upwards from the lowest aggregation level according to the underlying pattern in the current forecast version. Leaf-level demand points are copied from the system profile into the working profile. The values that were originally in the working profile at the leaf level are ignored.

Depending on the quality of your data, however, disaggregation may not work exactly in this manner. Several special cases can affect results, including these:

- If all child demand points in a particular bucket have missing values, they are assigned equal values so that their sum is equal to the value of the parent forecast.
- A forecast is created for any demand points that do not have a forecast associated with them.
- All negative values are treated as 0.
- When some of the demand points in a time bucket have missing values, those demand points are ignored.

More Information About Disaggregation

Regardless of the disaggregation option that you use, the changes that result from disaggregation are propagated to all units of measure that apply at the level of disaggregation. All fixed demand points demand points become unfixed, and the changes are displayed in the Table view.

You disaggregate forecasts by using the Disaggregate Forecast(s) dialog box. On the Disaggregate Forecast(s) dialog box, you select the options to use when disaggregating a forecast:

- Forecast version
- Unit of measure
- Aggregation level
- Forecast version profile

You can also specify whether to leave a forecast in the fixed state. By default, the Consensus Conference Room leaves forecasts that are fixed in the same state after disaggregation. Forecasts that are not fixed remain unfixed. Generally, you fix forecasts after disaggregation, because any forecast that is not fixed is not taken into account during the reconciliation process.

Balancing

You have an option in the Preferences page to balance your forecast above the current demand point after disaggregation. If you do not select this option, values above the current demand point are not aggregated after disaggregation.

Overriding Forecast Data

Forecast data for current and future periods can be automatically modified using the Range Edit option. You can override the current data using the following options:

- Absolute

  This is a value that the Consensus Conference Room adds to the current value in the Time Series table. For example, if the Sales History field contains the value 533.71 and you type 23.29 in the Override field, the value in the Adjusted History field becomes 557.

- Relative

  The system uses the percentage difference. You specify this amount by using a decimal. For example, to specify a 10 percent difference, you type 1.1.

- Replace

  The system uses the value that is specified in the Override field instead of the current value.

Reviewing Forecast Data

If you have read access for a forecast version in the Consensus Conference Room, you can read and review specific demand point forecast data. Reviewing forecast data in the consensus process is an important step to ensure that stakeholders view forecast data. The review list tracks stakeholders who have reviewed the forecast data and records the dates when the forecast data was reviewed.

If a user edits forecast data in the Consensus Conference Room that already has review flags attached to it, when the forecast data is saved, the user IDs in the Review list are removed.

For example, if a user reviews a forecast at a higher level, and subsequently lower level or child values are changed and aggregate up to formulate new forecast numbers at the higher aggregation level, then the Review list is cleared as new numbers invalidate the old Review list by the stakeholders. If a stakeholder reviews a forecast at a higher level in the hierarchy, this review information does not automatically propagate downwards to child forecast values.

Message Another Stakeholder

Forecast data that is not aligned with other stakeholder forecast data could be incorrect and might need adjustment. Before making changes to forecast data, you can message another stakeholder to verify that the data values that they uploaded into the Consensus Conference Room are correct.

You can email another stakeholder without exiting the Consensus Conference Room by using the messaging feature in the Consensus Conference Room. The Consensus Conference Room system administrator initially sets a stakeholder profile for each stakeholder in the Consensus Conference Room that includes email information. You can change your email address in the My Account page.

Using the email links that are found in the Messaging page, you can contact another stakeholder at times when decisions must be made about changing forecast data. For example, if you need more information about a value that appears in another forecast version, you can email the owner of the data and ask for clarification.

Stakeholders of the same conference room can send information to each other by using the email link that is provided. For example, if you notice a discrepancy in the data that you are viewing, you could send an email link to the owner of the data. When the stakeholder clicks on the link, he or she logs into the Consensus Conference Room and goes directly to the page in the specific data where the discrepancy lies.

Email Other Stakeholder

Forecast data that is not aligned with other stakeholder forecast data could be incorrect and in need of revision. Before revising forecast data, you can query another stakeholder to verify that the data values that they uploaded into the Consensus Conference Room are correct.

You can email another stakeholder without exiting the Consensus Conference Room by using the messaging feature in the Consensus Conference Room. The Consensus Conference Room system administrator initially sets a stakeholder profile for each stakeholder in the Consensus Conference Room that includes email information. You can change your email address in the My Account page.

Using the email links that are found on the Messaging page, you can contact another stakeholder when timely decisions must be made about changing forecast data. For example, if you need more information about a value that appears in the Exception Report, you can email the owner of the data and ask for clarification. When you use the messaging page, the default mail client opens with the Subject field populated. If you have clicked the Insert link to a recent page, the link to the last visited page appears in the body of the email.

Stakeholders of the same conference room can send information to each other by using the email link that the system provides. For example, if you notice a discrepancy in the data that you are viewing, you could send an email link to the owner of the data. When the stakeholder clicks on the link, the system logs the stakeholder into the Consensus Conference Room and goes directly to the page in the specific data where the discrepancy exists.

See Also

Selecting Demand Points from the Aggregation Hierarchy

Changing Your Account Permissions

Working with Forecast Data

This section discusses how to:

- Edit and save forecast data.
- Fix data points.
- Clear fixed data points.
- Override forecast data.
- Reset a data series.
- Set options for disaggregation and balancing.

Windows Used to Work with Forecast Data

Form Name	Navigation	Usage
Consensus Conference Room Workshop	Click Edit.	Displays the Edit page, where you can change and fix forecast information. The system anchors the columns for the Period and for the forecast version (such as marketing, sales, or statistical) that you specified as your baseline view. If you specified the Sales History option on the Preferences page, it also appears as an anchored column. The baseline view forecast version column contains time series values that you can edit.
Consensus Conference Room Workshop	Click Preferences.	Displays the Preferences page, where you can change the viewing and disaggregation options.

Editing and Saving Forecast Data

Access the Edit page.

To edit and save forecast data:

1. Select a demand point, click the text, and then highlight the value in the field.
2. Type a new value.
3. Click Save to disaggregate and balance.

Note. If you edit and save forecast data that contains a null value, it appears as a hyphen (-).

Fixing Data Points

Access the Edit page.

To fix data points:

1. Do one of the following to fix data points:
   - For an individual data point, click the Fixed checkbox.
   - For all demand points, click Select All.
2. Click Save to disaggregate and balance. The fixed point is displayed in a green cell. Dependent demand points that are fixed indirectly are now displayed in a red cell.

Clearing Fixed Data Points

Access the Edit page.

To clear fixed data points:

1. Do one of the following to clear fixed data points:
   - For an individual data point, unselect the Fixed checkbox..
   - For all demand points, click Clear All.
2. Click Save to disaggregate and balance.

Overriding Forecast Data

Access the Edit page.

To override existing forecast data:

1. Click the Range Edit button.

   The Override Edit dialog appears.
2. In the Start Period drop-down list box, specify the beginning planning period for the data you want to edit.
3. In the End Period drop-down list box, specify the ending planning period for the data you want to edit.
4. In the Override Type field, select one of the following:
   - Absolute

     This is a value that the Consensus Conference Room adds to the current value in the Time Series table. For example, if the Sales History field contains the value 533.71 and you type 23.29 in the Override field, the value in the Adjusted History field becomes 557.
   - Relative

     The system uses the percentage difference. You specify this amount by using a decimal. To specify a 10 percent difference, for example, you type 1.1.
   - Replace

     The system uses the value that is specified in the Override field instead of the current value.
5. In the Override field, enter the amount of the override. All current and future periods in the range are modified.
6. Click Save to disaggregate and balance.

Resetting a Data Series

Access the Edit page.

To reset a data series, click Reset. The forecast data is returned to its original state before your modifications.

Setting Options for Disaggregation and Balancing

Access the Preferences page.

To set the options for disaggregation and balancing:

1. Select one of these disaggregation options:
   - Use the system-defined profile when disaggregating.
   - Use the baseline profile with top-down mode when disaggregating.
   - Use the baseline profile with bottom-up mode when disaggregating.
2. If you want to balance your forecast after disaggregation, select the balance forecasts above the current demand point option. Otherwise, values above the current demand point are not aggregated after disaggregation.
3. Click Set Options.

Reviewing Forecast Data

This section discusses how to review forecast data.

Windows Used to Review Forecast Data

Form Name	Navigation	Usage
Consensus Conference Room Workshop	Workshop menu, Review	Displays the Review page, where you can read and review specific demand point forecast data.
Consensus Conference Room Workshop	Click Exceptions	Displays the Exceptions page, where you can message other Consensus Conference Room users.

Adding Your User Name to the Review List

Access the Review list.

To add your user name to the review list:

1. Navigate to the demand point that you want to review.
2. Ensure that the data is correct and click Review.

Removing Your User Name from the Review List

Access the Review list.

To remove your user name from the review list:

1. Navigate to the demand point that you want to view.
2. Under Username, click your name.
3. Click Reset.

Emailing Other Stakeholders

Access the Exceptions page.

To email a stakeholder from within the Consensus Conference Room:

1. Select the report that you want to view.
2. Click the link for the exception that you want to edit.
3. Select Messaging.
4. Click the option next to the name of the person whom you want to contact.
5. To insert a link in the email, from your last visited page in the Consensus Conference Room, click the Insert link to recent page option.
6. Click Draft Message.

Messaging Users in the Consensus Conference Room

Access the Exceptions page.

To message another user in the Consensus Conference Room:

1. Select Messaging from the Main menu.
2. Select one of these options:
   - The option beside the name of the person whom you want to contact.
   - Select All to select all users in the list.
   - Clear All to deselect any previously selected user.
3. To insert a link in the email, from your most recently visited Workshop table, graph, or compare page in the Consensus Conference Room, click the Insert Link to Workshop Table option.

   To preview the page before sending the email, click the Preview link.
4. Click Draft Message.

Note. If users have not filled their email address in the My Account page, the option beside their name in the list is disabled.

These characters are not supported:

" (quotation marks)

| (vertical bar)

/ (slash)

+ (plus sign)

CHAPTER 10

Working with Forecast History Data

This chapter provides an overview of forecast history data, and discusses how to:

- View forecast history data.
- Use forecast history data views.

Understanding Forecast History Data

Forecast history is past information about a company, used to help forecast the company's future. As the forecast history horizon rolls forward, forecast data that resides before of the horizon date is considered forecast history. Comparing forecast history data to sales history data (actuals) is particularly useful. For example, you can determine whether:

- The forecast is accurate.
- Changes have occurred in the forecasting patterns.
- Potential problems exist in the forecasting process.

Within the Consensus Conference Room you can view forecast history data in the graph and the table view. You can also edit the forecast history data if you possess administrative privileges. You can determine forecast accuracy by comparing the difference between forecast history and sales history (actuals). You can also create Accuracy Reports in the Consensus Conference Room.

Viewing Forecast History Data

You can view forecast history data In the Consensus Conference Room from either the Table, Compare or Graph view The Table and Compare views allows you to view forecast history in table format in either the Table or the Compare view In the Consensus Conference Room. The Table view displays forecast history data for a demand point. The Compare view displays forecast history data for all selected forecast versions in the conference room. The Graph view displays forecast history data in a graphical view. This provides a visual display of forecast data for either a single forecast version or multiple forecast versions in the conference room.

Window Used when Working with Forecast Data

Form Name	Navigation	Usage
Consensus Conference Room Workshop	Click Preferences.	Displays the Preferences page, where you can change the viewing and disaggregation options.

See Also

Demand Automation Shell

Table and Compare Views

You can view forecast history data for a forecast version in the Table view and in the Compare view. The forecast history data and corresponding forecast data appear in the table view and compare view for a demand point. If the forecast history start and end dates are outside of the forecast horizon date, values for demand points appear as missing values. The system displays missing values in the Table view as dashes (-).

Graph View

You can view forecast history data for a forecast version in graph view. The graph view displays forecast history and other forecast data for selected forecast versions in a graphical format. Each forecast version has a color assigned to its corresponding line in the graph. If the forecast history start and end dates are outside of the forecast horizon date, values for demand points appear as missing values.

Setting the Display Type for the Forecast History Data

Access the Preferences page.

To set the display type for forecast history data:

1. Select either or both of these options:
   - Display forecast history in table/compare view
   - Display forecast history in graph view
2. Click Set Options.

Using Forecast History Data Views

This section discusses how to view forecast history data in the following views:

- Table view.
- Graph view.
- Compare view.

Viewing Forecast History Data in the Table View

Access the main Workshop page.

To view forecast history data in Table view:

1. Select a forecast version for which you want to view data from the Select View.
2. Click Table.

Viewing Forecast History Data in Graph View

Access the main Workshop page.

To view forecast history data in Graph view:

1. Select a forecast version for which you want to view data from the Select View.
2. Click Graph.

Viewing Forecast History Data in Compare View

Access the main Workshop page.

To view forecast history data in Compare view:

1. Select a forecast version for which you want to view data from the Select View.
2. Click Compare.

CHAPTER 11

Viewing Comparative Sales History

This chapter provides an overview of the comparative view of sales history and discusses how to work with comparative views in sales history.

Understanding the Comparative View of Sales History

Production demand is difficult to forecast using only current forecast data because past factors have a direct impact on sales data. Sales history data, consisting of data for events such as trade promotions, historical out-of-stocks, seasonality, and market trends, impact the validity of forecast data.

Sales history is used to determine demand point accuracy by comparing historical data with forecast data that is projected for the future. Historical data is valuable information, especially in a collaborative environment because it can help to determine consistencies and inconsistencies in the forecast as supplied by each stakeholder. Spikes and valleys in the data indicate that some type of event has occurred. You can determine which of these events directly impacts the forecast data of specific users and decide how to handle the data.

When comparing forecast data for a time series, sales history can reveal additional information that helps to determine if user data is accurate. Often a user sees forecast data that is based on patterns from previous years. If a sales history pattern shows an increase in product sales for a particular period, the user must be aware that this pattern might not always fall in the same time period every year; therefore, it cannot be captured as seasonal data.

You can import existing sales history data into a forecast version in the Consensus Conference Room and use it to compare current forecast data in other forecast versions. You can view the data in either graph mode or table mode.

Sales history data will be re-bucketized to have the same time bucket as the current forecast data that already exists in the Consensus Conference Room, such as daily, weekly, or monthly buckets. You might have to use the scrolling feature in graph mode if the sales history's start date occurs before any forecast data and large gaps are between the demand points.

Aggregated Values

If you clear, save, and then reset forecast values, you see the aggregated value instead of the saved value. If no values exist below where you reset, you see an empty field or a field that contains a dash symbol. For example, if you have a value of 20 for the time bucket 2004-08-02 and you clear data for the data point directly above 2004-09-02, the value 20 now appears as the aggregated value for 2004-09-02. If no aggregated values are beneath the point where you reset data, the values in time series fields display as a dash (-).

See Also

Selecting the Baseline View Forecast Version

Demand Point Accuracy View

The Demand Point Accuracy View allows stakeholders to compare sales history data to forecast history data for a demand point. Each forecast version contains forecast history data that is compared to sales history data. When you view the forecast history data in the Accuracy page, the sales history data always appears as the first time series in the table.

The system compares forecast history data to the sales history data and displays the percentage difference in a separate column. This comparison occurs for each forecast version that you specified in the Accuracy page.

Note. Upon generation, the Demand Point Accuracy View does not include forecast versions that do not have any associated forecast history data.

When you view forecast history data in the Consensus Conference Room, ensure that the unit of measure for each forecast version matches the unit of measure for the demand point data that you are viewing.

Working with Comparative Views in Sales Histories

This section discusses how to:

- View sales history data in table mode.
- View sales history data in graph mode.
- Reset aggregated values.
- View forecast data in the Demand Point Accuracy View.
- Print the demand point accuracy View.

Windows Used to View Comparative Sales History

Form Name	Navigation	Usage
Consensus Conference Room Workshop	Click Preferences	Displays the Preferences page, where you can change the viewing and disaggregation options.
Consensus Conference Room Workshop	Click Accuracy	Displays the Accuracy view, which displays the selected forecast data in a comparison table, as well as the percentage difference between forecast data.

Viewing Sales History Data in Table Mode

Access the Preferences page.

To view sales history in table mode:

1. Select Display sales history in table view on the Preferences page.
2. Click Set Options.

3. Select a forecast version that you want to view from the Select View.
4. Click Table.

   In the table view, data is displayed in two columns:

   - One column represents the historical data
   - One column represents the forecast version data.

   Note. Depending upon the historical data start, and end date, values for some demand points might be missing. The table mode shows these missing values as dashes (--).

Viewing Sales History Data in Graph Mode

Access the Preferences page.

To view sales history in graph mode:

1. Select Display sales history in graph view on the Preferences page.
2. Click Set Options.
3. Select a forecast version that you want to view from the Select View.
4. Click Graph.

Resetting Aggregated Values

Access the Edit page.

To reset aggregated values:

1. Select a level from the Default Level list.
2. Specify each of the following:
   - Product
   - Location
   - Channel
3. To reset the entire time series for the specified demand point, click Reset.

Viewing Data in the Demand Point Accuracy View

Access the Accuracy view.

To view forecast data in the Demand Point Accuracy View:

1. Navigate to the aggregation level and demand points for which you want to view data.
2. From the Select view, specify:
   - The forecast versions for which you want to view data.
   - The Baseline view.
3. Click View.

Note. If you clear the Baseline option in the Accuracy page, forecast history data for a baseline forecast version does not appear.

Printing from the Demand Point Accuracy View

Access the Accuracy view.

To print the Demand Point Accuracy View:

1. Select Print from the submenu.

   The Demand Point Accuracy View appears in a new browser form.
2. Select Print From the File menu.

CHAPTER 12

Working with the Forecast Accuracy Report

This chapter discusses how to work with forecast accuracy report.

Understanding the Forecast Accuracy Report

This section provides an overview of the forecast accuracy report, and discusses:

- Forecast accuracy report.
- Forecast accuracy report definition.

Forecast Accuracy Reports

Defining a forecast accuracy report allows you to compare the deviation between your forecast and actual demand. You can also use the report to compare the results generated with the various goodness of fit statistics. The report enables you to isolate where strengths and weaknesses in the forecasting process of your enterprise exist, and the demand points or products on which you need to focus more attention.

You should run a report when you have a clear idea of what your actual sales are, which can be over the space of several months or even over several forecasting periods. You can also run the report at regular intervals during a forecasting horizon. You might discover, for example, that forecasts generated at the beginning of a forecasting horizon are less accurate than those generated towards the middle in the horizon. With a forecast accuracy report, you can isolate the best level to forecast. Then you can use this knowledge to improve your forecasting processes.

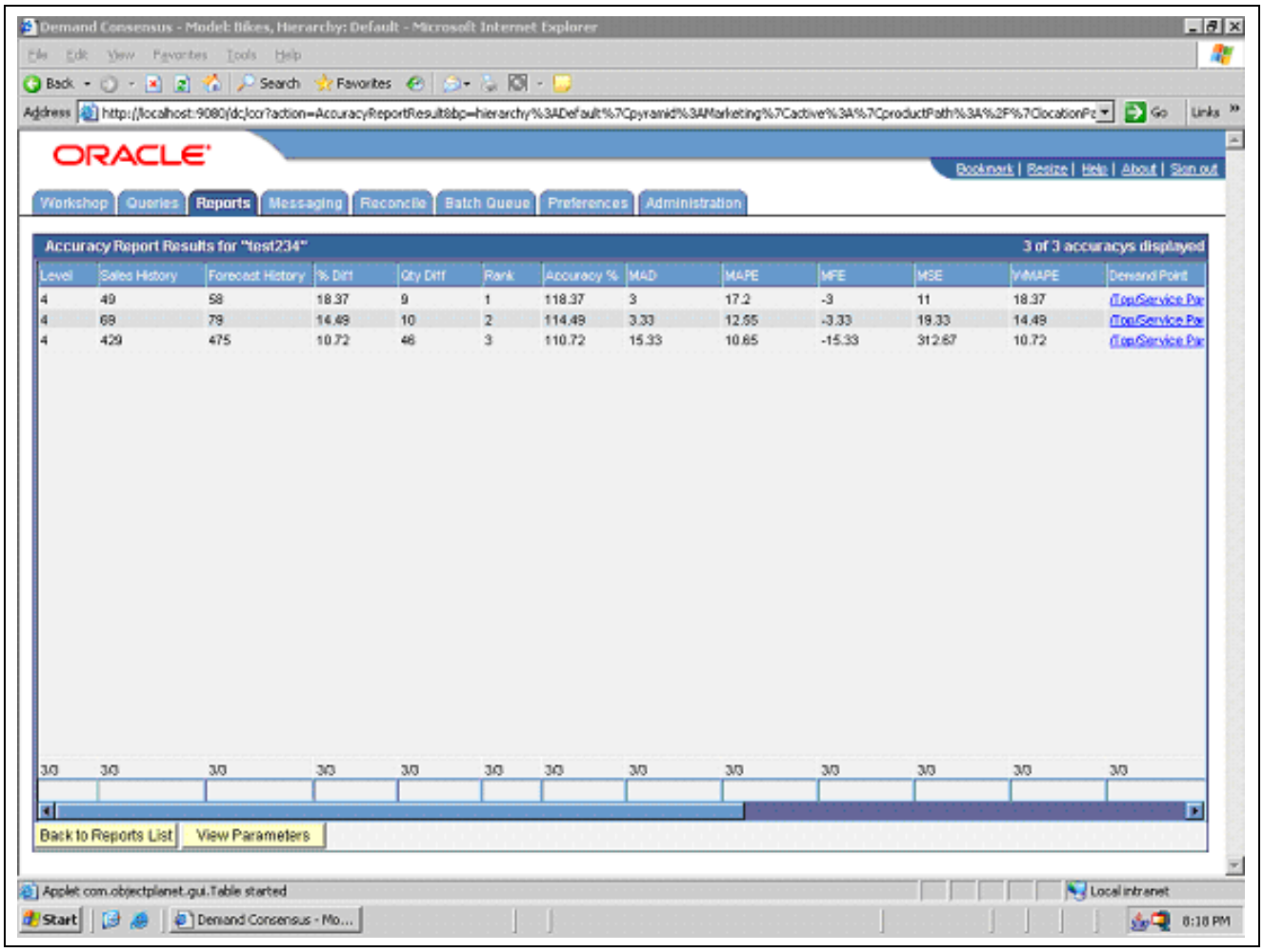
The report displays this information about the forecast:

- Demand point data, which consists of product, location, and channel information

  You can specify the demand points to include in the report.
- The goodness of fit statistics for the forecast
- Compares sales history to forecast history information

Note. If specific units of measure have been assigned to demand points, the demand points that do not use those units of measure do not appear in the accuracy report. Instead, those demand points are listed as "undefined" in the report.

This sample shows a forecast accuracy report:



Forecast Accuracy Report

Column Headings	Description
Level	The aggregation level where /Top/Top/Top is Level 0.
Sales History	Actual sales quantity.
Forecast History	Historical forecast quantity.
% Diff	(Sales History-Forecast History)/Sales History
Qty Diff	Sales History-Forecast History Negative value indicates that actual sales were less than forecast.
Rank Accuracy %	100—(% Difference); if | % Difference | > 100, then Accuracy % = 0
MAD	Mean Absolute Deviation [Σ | (Sales History- Forecast History |] / N where N is the number of periods in the period range

Column Headings	Description
MAPE	Mean Absolute Percent Error [Σ (| (Sales History-Forecast History) | / Sales History]) / N) * 100
MFE	Mean Forecast Error [Σ (Sales History-Forecast History)] / N
MSE	Mean Squared Error [Σ (Sales History-Forecast History)^2] / N
WMAPE	Weighted Mean Absolute Percent Error [Σ ([| (Sales History-Forecast History) | /Sales History] * 100 * Sales History) / Σ Sales History Weighted MAPE is essentially the same as MAPE except the ratio of (Sales History/Σ Sales History) is included in the calculation.
Demand Point	Product, Location and Channel combination.
Forecast Version	Forecast version that is compared with actual sales.

You can sort the report to focus on problem areas by clicking on the report column headings. You can filter the report using the filter bar.

See Also

Assigning Units of Measure to Demand Points, *EnterpriseOne Design Studio Implementation Guide*

Accuracy Report Workflow

You can control all aspects of the accuracy report from the Accuracy Page, accessible from the Reports page. You can perform these tasks to create and manage an exceptions report:

- Create the accuracy report.
- Edit the accuracy report parameters.
- Submit the accuracy report.

After you submit an accuracy report, you can click on the link for the report, which returns you to the Accuracy page. After you review the differences, you can access the appropriate page in the Consensus Conference Room and edit values, mark the demand point data as reviewed, or email another user about the data.

Accuracy Report Wizard

When you add an accuracy report, you can define the parameters that the system uses to generate the report. You can use the Accuracy Report wizard to add the accuracy report. The Accuracy Report wizard guides you through these ordered steps that are required to create a report:

- Specifying the report name and unit of measure.

- Specifying forecast versions and demand point set.
- Specifying the statistical measures.
- Choosing the period range and display options.
- Generating the report.

Note. The accuracy reports you create will be based on the forecast versions and demand point sets that you have permission to view or edit.

View an Accuracy Report's Parameters

You can view a summary of the parameters that were used to generate an exception report. Viewing the accuracy report properties gives you information about how the accuracy report is configured. For example, it provides specific values for these parameters:

- Unit of measure.
- Comparison forecast versions.
- Demand point set selected.
- Statistical measures selected.
- Period range and view options.
- Viewing results.

Edit an Accuracy Report

You can select an existing report from the Accuracy page and edit its parameters. When you edit the parameters of an existing report, you change how you compare the percentage of deviation between forecast and actual demand information, which, in turn, affects the results of the report.

If you want to save the report parameters to run at a later date, you should create a new accuracy report and name it differently.

Report Submission

After you have defined an accuracy report, the system tracks it in the Accuracy page until you delete it. Submitting the report generates an accuracy report based on criteria specified in the Accuracy Wizard pages.

When you submit the accuracy report, the job status is available in the Batch Queue page. All report jobs submitted by all users in a conference room appear in the Batch Queue page. When the report job completes, the Reports List page displays this information:

- The name of the report.
- The job ID of the report.
- The status of the report.
- The number of accuracies generated for the report.
- The date and time that the report was last submitted.

Creating and Managing Accuracy Reports

This section discusses how to:

- Add an accuracy report using the Accuracy Report wizard.
- View accuracy report results and properties.
- Edit accuracy report parameters.
- Delete an accuracy report.
- Submit an accuracy report.
- Review demand point data from an accuracy report.

Window Used to Manage Accuracy Reports

Form Name	Navigation	Usage
Consensus Conference Room, Reports tab	Click Accuracy	Create and manage accuracy reports.

Adding Accuracy Reports using the Accuracy Report Wizard

Access the Accuracy page.

To add an accuracy report:

1. Click the Add Report button
2. On the Enter Report Name and Unit of Measure screen, complete these fields:
   - Report Name. The report name must be unique.

     Note. These characters are not supported in the exception report name:

     " (quotation mark)

     | (vertical bar)

     / (forward slash)

     + (plus sign)

   - Unit of Measure
   - Click Next.
3. On the Enter Comparison Views screen, complete these fields:
   - Comparison Views. Choose the forecast versions to compare with the sales history. Only the forecast versions that you have permission to view or edit are visible.
   - Demand Point Set, if you want to limit the number of demand points being compared. Only the demand point sets that you have permission to view or edit are visible.
4. Click Next.

5. On the Select Statistical Measures screen, select the statistical measure(s) to include in the report. Valid options are:
   - MAD
   - MAPE
   - MFE
   - MSE
   - WMAPE
6. Click Next.
7. On the Options screen, complete these fields:
   - First period to include
   - Last period to include
   - Maximum number of results
   - Rank accuracy
8. Click Generate.

Viewing Accuracy Report Results

Access the Accuracy page.

To view the results of an accuracy report:

1. Click the link of the report that you want to view.
2. Click the link for the demand point that you want to review from the Demand Point column.

Viewing Accuracy Report Properties

Access the Accuracy page.

To view accuracy report parameters:

1. Click the option beside the report for which you want to view its properties.
2. Click View Parameters.

Editing Accuracy Report Parameters

Access the Accuracy page.

To edit the accuracy report parameters:

1. On the Accuracy page, click the option next to the report that you want to edit.
2. Click Edit Parameters.
3. Change any of the parameters in any of the steps in the Wizard.

   You can click Next to skip any step of the Wizard.
4. Click Generate to update the accuracy report.

Deleting Accuracy Reports

Access the Accuracy page.

To delete an accuracy report:

1. Click the option beside the report that you want to delete.
2. Click Delete Report.
3. Click Yes to delete the report.

Submitting Accuracy Reports

Access the Accuracy page.

To submit an accuracy report:

1. Click the option next to the report that you want to submit.
2. Click Submit Report.

Reviewing Demand Point Data

Access the Accuracy page.

To review demand point data from an accuracy report:

1. Click the link of the report that you want to review.
2. Click the link for the demand point that you want to review from the Demand Point column.
3. Review the demand point accuracy using the Accuracy, Table and Graph pages..

Note. You can filter on the Accuracy Results page by inputting filter criteria in the filter bar. You can sort by clicking on a column heading.

CHAPTER 13

Working with Exception Reports

This chapter provides an overview of exception reports and discusses working with exception reports.

Understanding Exception Report Management

This section discusses:

- Exception report management.
- The exception report wizard.
- Viewing exception reports.
- Editing exception reports.
- Submitting exception reports.

When you compare forecast data from multiple sources, discrepancies in the data are likely. Sometimes, the discrepancies are large enough to provide incorrect perceptions about demand patterns. Exception handling warns you about discrepancies that occur in forecast data.

One of the main causes of exceptions is inaccurate forecast data. To create an enterprise forecast that contains meaningful data, you must consider all of the exceptions. If the origin of these exceptions is not understood, changes to the data can result in even more discrepancies. Demand Consensus compares multiple forecast data, using threshold values at different levels of aggregation, and generates a report that lists exceptions. For each level of aggregation, you can specify the threshold percentage and quantity at which you want the system to report the forecast versions exceptions.

The report shows the baseline forecast version and the total number of exceptions. The report also provides a sum of the exceptions in addition to other information about the exceptions.

Exceptions Workflow

You can control all aspects of the exception report from the Exceptions Page, accessible from the Reports page. You can perform these tasks to create and mange an exceptions report:

- Create the exceptions report.
- Edit the exceptions report parameters.
- Submit the exceptions report.

After you submit an exceptions report, you can click on the link for the report, which returns you to the Exceptions page. After you review the differences, you can access the appropriate page in the Consensus Conference Room and edit values, mark the demand point data as reviewed, or email another user about the data. To make the forecast data as accurate as possible, you must minimize the number of exceptions that are returned. Generally, the top level does not return many exceptions, but any exceptions that occur at this level are typically more serious than those at lower levels.

For example, you select the forecast versions with forecast data that you want to compare for a specific level of aggregation. You also select the threshold level for each aggregation level. Assume that the first level is Top/Top/Top. This level refers to all products, locations, and channels for the Demand Model. The last level might be Product-Top-Bikes-Mountain Bikes/Location-Top-Europe/Channel-Top. In this example, for each level of aggregation, you can attach a percentage threshold value and a threshold quantity. For the first level, you might specify five percent with a quantity of 1000, and for the last level, you might specify 10 percent with a quantity of 100.

Analyzing the threshold values that you use is important. You could receive a large number of exceptions for a particular level of aggregation that satisfies the maximum number of results fields that you set, but only exceptions from the first level of aggregation might appear. If the maximum number of results only shows for one level of aggregation, no exceptions for other levels appear in the report.

Exception Report Wizard

When you add an exception report, you can define the parameters that the system uses to generate the exceptions. You can use the Exception Report wizard to add the exception report. The Exception Report wizard guides you through these ordered steps that are required to create a report:

- Specifying the report name, baseline view, and unit of measure.
- Specifying forecast versions and demand point set.
- Specifying threshold values and levels.
- Choosing the period range and display options.
- Generating the report.

Note. The exception reports you create will be based on the forecast versions and demand point sets that you have permission to view or edit.

View an Exception Report's Parameters

You can view a summary of the parameters that were used to generate an exception report. Viewing the exception report properties gives you information about how the exception report is configured. For example, it provides specific values for these parameters:

- Baseline.
- Unit of measure.
- Comparison forecast versions.
- Percentage and absolute threshold values.
- Viewing results.

Edit an Exception Report

You can select an existing report from the Exception page and edit its parameters. When you edit the parameters of an existing report, you affect how forecast information is processed, which, in turn, affects the results of the report.

If you want to save the report parameters to run at a later date, you should create a new exceptions report and name it differently.

Report Submission

After you have defined an exception report, the system tracks it in the Exceptions page until you delete it. Submitting the report generates exceptions based on scenarios created in the Exception Wizard pages.

When you submit the exception report, the job status is available in the Batch Queue page. All report jobs submitted by all users in a conference room appear in the Batch Queue page. When the report job completes, the Exception Report page displays this information:

- The name of the report.
- The job ID of the report.
- The status of the report.
- The number of exceptions generated for the report.
- The date and time that the report was last submitted.

Creating and Managing Exception Reports

This section discusses how to:

- Add an exception report using the Exception Report wizard.
- View exception report results and properties.
- Edit exception report parameters.
- Delete an exception report.
- Submit an exception report.
- Edit demand point data in an exception.

Window Used to Manage Exception Reports

Form Name	Navigation	Usage
Consensus Conference Room, Reports tab	Click Exceptions	Create and manage exception reports.

Adding Exception Reports using the Exception Report Wizard

Access the Exceptions page.

To add an exceptions report:

1. Click the Add Report button
2. On the Enter Report Name, Baseline View and Unit of Measure screen, complete these fields:
   - Report Name. The report name must be unique.

     Note. These characters are not supported in the exception report name:

     " (quotation mark)

     | (vertical bar)

     / (forward slash)

     + (plus sign)

   - Baseline View
   - Unit of Measure
   - Click Next.
3. On the Enter Comparison Views screen, complete these fields:
   - Comparison Views. Choose the forecast versions to compare with the baseline view. Only the forecast versions that you have permission to view or edit are visible.
   - Demand Point Set, if you want to limit the number of demand points being compared. Only the demand point sets that you have permission to view or edit are visible.
4. Click Next.
5. On the Enter Threshold Values screen, select the aggregation level(s) to include in the report. You may also specify the threshold percentage and threshold quantity by level for the selected unit of measure.
6. Click Next.
7. On the Options screen, complete these fields:
   - First period to include
   - Last period to include
   - Maximum number of results
8. To hide multiple exceptions, click the Hide multiple exceptions option. When selected, only those exceptions with the largest absolute percentage difference from one demand point are displayed.
9. Click Generate.

Viewing Exception Report Results

Access the Exceptions page.

To view the results of an exception report:

1. Click the link of the report that you want to view.
2. Click the link for the exception that you want to view from the Demand Point column.

Viewing Exception Report Properties

Access the Exceptions page.

To view exception report parameters:

1. Click the option beside the report for which you want to view its properties.
2. Click View Parameters.

Editing Exception Report Parameters

Access the Exceptions page.

To edit the exception report parameters:

1. On the Exceptions page, click the option next to the report that you want to edit.
2. Click Edit Parameters.
3. Change any of the parameters in any of the steps in the Wizard.
   You can click Next to skip any step of the Wizard.
4. Click Generate to update the exception report.

Deleting Exception Reports

Access the Exceptions page.

To delete an exception report:

1. Click the option beside the report that you want to delete.
2. Click Delete Report.
3. Click Yes to delete the report.

Submitting Exception Reports

Access the Exceptions page.

To submit an exception report:

1. Click the option next to the report that you want to submit.
2. Click Submit Report.

Editing Demand Point Data in Exceptions

Access the Exceptions page.

To edit demand point data in an exception:

1. Click the link of the report that you want to edit.
2. Click the link for the exception that you want to view from the Demand Point column.
3. Click Edit.
4. Select a field next to a time series that you want to edit, and then enter a new value.
5. Click Save.

Note. You can filter on the Exceptions Results page by inputting filter criteria in the filter bar. You can sort by clicking on a column heading.

CHAPTER 14

Understanding Reconciliation

This chapter discusses reconciliation.

Reconciliation

This section provides an overview of reconciliation and discusses:

- Reconciliation methods.
- Local reconciliation settings.
- Global reconciliation settings.
- Weighting categories.

EnterpriseOne Demand Consensus provides a working space for multiple stakeholders to share and compare forecast data. Often when forecast data from multiple stakeholders is compared, inaccuracies are identified in stakeholder data. These inaccuracies, if unresolved, can affect the overall quality of the forecast data.

The reconciliation process provides an opportunity for demand planners or stakeholders to compare forecast data using only those values that are given a high rating of accuracy. Forecast versions contain specific demand point data which are categorized by a weighting category group. The groups have weightings applied to them, which reveals the relative accuracy of the forecast data in the past.

For example, some forecasts could have more significance than other data because of the accuracy of the data. Stakeholders that have greater percentage weightings attached to their forecast versions essentially have a higher priority attached to their data in the reconciliation process. Their data can override another user's forecast data because their data is historically more accurate than other user's data.

The system steps you through setup parameters that are used in the reconciliation process. You must specify parameters such as unit of measure, weightings, and the start and end dates for forecast data that is to be included in the reconciliation process.

After the Reconciliation report is set up and generated, and held in the Batch Queue page until the system uses the report data to complete the reconciliation process.

Reconciliation Methods

The Consensus Conference Room reconciliation process provides two methods in which to reconcile forecast data:

- Local
- Global

The local method of reconciliation uses relative weights assigned to different stakeholders to give forecast data more or less importance in the calculating process. This method of reconciliation checks demand points one at a time without considering the entire demand model. Typically, this method of reconciliation is much faster than the global method, but the results are not as accurate.

The global method of reconciliation is a least square algorithm regression function that calculates forecast versions and their weightings, related forecast data, levels of aggregation and their deviation in the model concurrently. The results returned by the algorithm are consistent from the demand points at the top of the aggregation hierarchy to demand points that reside at the bottom of the aggregation hierarchy.

Local Reconciliation Settings

Local reconciliation combines the weighted averages for forecast versions into one enterprise forecast. The weighted average method determines the average amount of importance of a user's forecast data, compared to other forecast data for a specific demand point over a given time period. Local reconciliation can be an interim solution that compares specific demand points and forecast data until a global reconciliation is performed.

Based on historical data and occurrences, forecast data in forecast versions is valued with a relative weighting of importance. If a user consistently provides inaccurate forecast data, you might apply a lower weight to that weighting category to reduce its overall importance.

Example: Local Reconciliation

This example assumes that the sales department has three forecast versions that contain data for a specific demand point that is aggregated at different levels in the hierarchy. To consolidate the data into one forecast version, the sales manager can reconcile the data by using the local reconciliation option. The sales forecast versions have these values:

Forecast Version	Relative Weight	Forecast Amount
Sales	50	500
Sales1	60	600
Sales2	70	700

To calculate the weighted average for the three forecast versions, you multiply the price of each product by its weight and calculate the sum for all the products. You then divide the product sum value by the sum of the weightings for all of the forecast versions, as shown below:

Forecast Version	Forecast Amount	*	Weight	=	Total
Sales	500	*	50	=	2500
Sales1	600	*	60	=	3600
Sales2	700	*	70	=	4900
Total			180		11000

Weighted average = sum total $ / sum volume 11000/180 = 611.

When you reconcile by using the local reconciliation option, all of the values that are saved at lower levels are automatically aggregated. Lower levels that are not saved do not aggregate and are not summarized to the top-level demand point.

After local reconciliation is finished processing demand points, you can view the results from the Workshop page. Demand point values that were previously saved are not overridden in the target forecast version during the reconciliation process. An asterisk next to a forecast version name in the reconciliation table indicates that values are original uploaded values.

Global Reconciliation Settings

The global method of reconciliation calculates forecast versions and their weightings, related forecast data, levels of aggregation and their deviation in the model concurrently. The result of this calculation is that every solution returned by this algorithm is always consistent from the top of your forecasting tree down to the bottom and large exceptions across the aggregation hierarchy are smoothed intelligently.

This reconciliation process results in accurate data for which most inconsistencies have been eliminated. In the global reconciliation process, each saved demand point is calculated and those that fall outside the mean average are identified as being inaccurate and are eliminated. The global reconciliation process can take considerable time to process, but the results are more accurate than those produced by local reconciliation process.

Weighting Categories

Weighting categories are set by the demand planner using these methods:

- Weighting category accuracy report.
- Demand Automation Shell commands.

After the weighting categories values are calculated, the results are used to determine forecast data accuracy during the reconciliation process.

Weighting Category Accuracy Report

In the Design Studio, demand planners can assign weighting categories to demand point data and calculate and assign a weighting to each stakeholder's forecast data. The weighting category accuracy report displays the weighting categories for demand points. The report displays the weighting category, assigned weight, MAPE and the tracking signal. The tracking signal is based on the ratio of the cumulative sum of error between forecast history and actuals to the Mean Absolute Deviation (MAD). Different types of measurements are used to determine how the results of a forecast fit within the upper and lower control limits. Consistent negative or positive growth of the tracking signal indicates that your forecasts are trending too low or too high and that they should be reviewed.

Reconciliation Weighting Demand Automation Shell Commands

You can use the `calculate_weights` Demand Automation Shell command to calculate a reconciliation weighting for a single or group of forecast versions.

When using the `calculate_weights` Demand Automation Shell command, you set parameters in the command; when you do so, the application calculates weights by using weighted least squares regression logic. The logic compares these parameters for all forecast versions:

- Forecast data compared to sales actuals.
- A specific time period of comparison.
- A specific demand point.

Applying this logic, the system continues to compare the parameters that are listed above for each demand point for the entire demand model. Global reconciliation uses weighted least squares regression logic that calculates weightings for forecast versions based on sales actuals, for each demand point in the demand model.

When the reconciliation process begins in the Consensus Conference Room, the weights previously determined by the Demand Automation Shell `calculate_weights` command are entered in the Reconciliation Wizard. The application logic calculates the values for each demand point by using the weightings and actuals for each forecast version.

See Also

Setting Up Reconciliation Parameters Using the Wizard

CHAPTER 15

Reconciling Forecasts

This chapter discusses how to reconcile forecasts.

Reconciling Forecasts

This section discusses how to:

- Set up forecast reconciliation parameters.
- Generate a reconciled forecast.

Window Used to Reconcile Forecasts

Form Name	Navigation	Usage
Consensus Conference Room Workshop	Click Reconcile	Displays the Reconcile page.

Setting Up Forecast Reconciliation Parameters

Access the Reconcile page.

To select the forecast version:

1. Select the forecast version that will hold the reconciled forecast data.
2. Click Next.
3. Select one of these options:
   - The option beside the forecast versions that will reconcile into the reconciliation forecast version
   - Select All
   - Clear All
4. Click Next.
5. Complete these fields:
   - Reconciliation Method
   - Unit of Measure
   - From Date

- Through Date

Note. The reconciliation period includes the specific date range that you selected. For example, within a 12-month horizon, you might want to reconcile months 1-3 with one set of parameters and months 4-12 with another set of parameters.

6. Click Next.

Generating a Reconciled Forecast

Access the Reconcile page.

To generate a reconciled forecast:

1. Highlight the value in the field and enter a new value.
2. Review the summary of selected parameters.

   If you want to make a change, use the "Back" button in your browser to return to a previous page. Any missing values in the data are not considered in the reconciliation logic.
3. Click Generate to start the reconciliation process.

Note. Ensure that the Batch Server is started so that the reconciliation job can run.

CHAPTER 16

Working with Queries

This chapter provides an overview and discusses how to use queries.

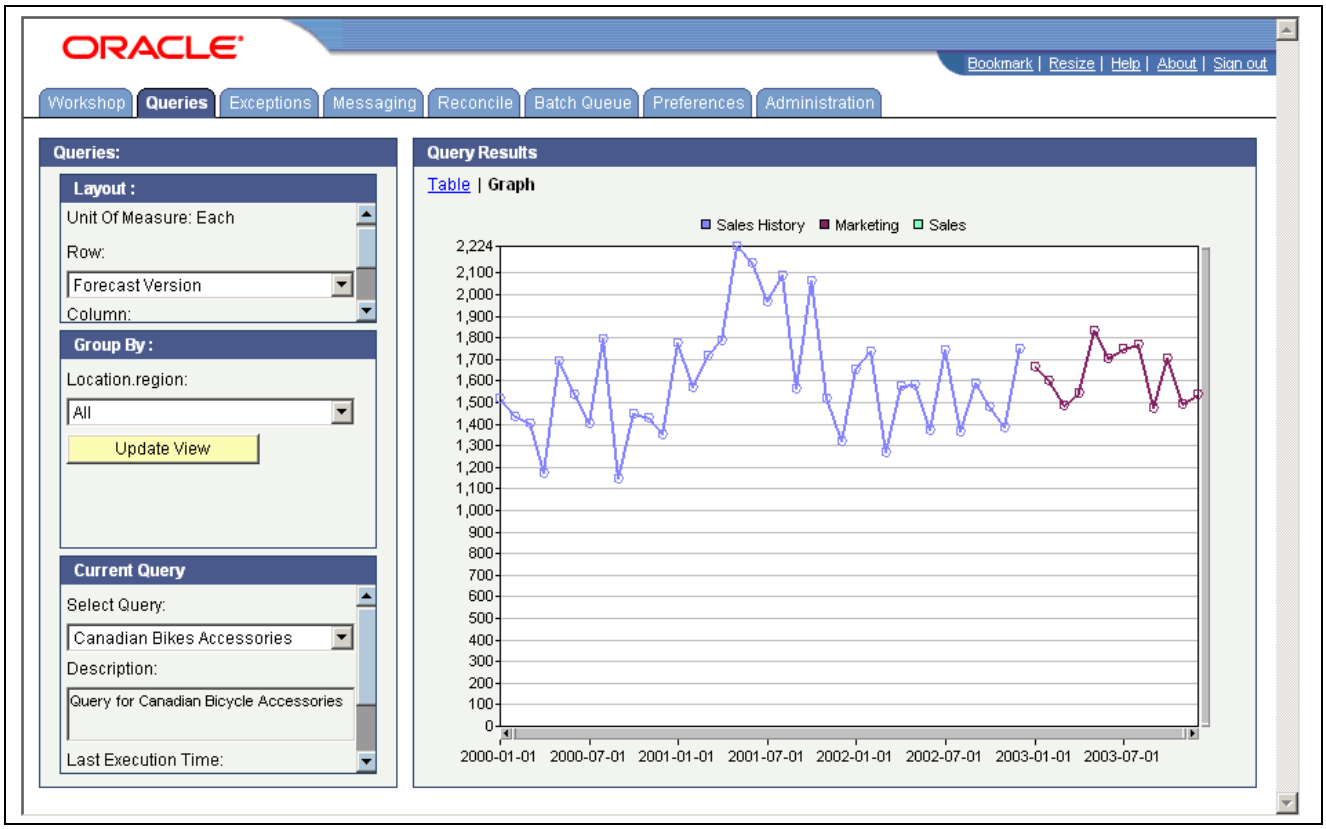
Understanding Queries

Using queries, you can use any criteria to search the database for items. These “ad hoc” queries are based on individual properties that exist in the demand model but that might not exist together in any single aggregation hierarchy.

You can use ad hoc queries to view or edit a forecast for a product or a group of products based on the properties that you specify. For example, you can create a query to report on a single SKU for all independent channels in a particular region. When you run the query, the forecasts for the queries that you define appear in the Table and Graph views of the Forecast Studio.

When a property that is used by a query is renamed in the Design Studio, the change is automatically propagated to the query. However, you must reopen the demand model in the Forecast Studio to refresh the property names with the updated values.

Ad hoc queries are created in Forecast Studio, and are viewed and executed from the Consensus Conference Room, primarily for reporting purposes. You can display query results in either graph or table format.



Example query result

See Also

Working with Queries, *Demand Management 8.12.1 Forecast Studio Implementation Guide*

Working with Queries

This section explains how to execute and view ad hoc queries.

Window used to Work with Queries

Form Name	Navigation	Usage
Queries	From the CCR homepage, click Queries.	Work with queries.

Executing Queries

Access the Queries page.

To execute queries:

1. From the Select Query drop-down list box, choose the query that you want to execute.
2. Click Execute.

Customizing Query Results

By default, the Consensus Conference Room displays query results for all groups in graphical format.

Access the Queries page and execute a query.

To customize query results:

1. To display query results for a specific group element, do the following:
   - From the Group By drop-down list box, choose the group element on which you want to filter query results.
   - Click Update View.
2. To change the layout of your query results , do the following:
   - From the Row and Column drop-down list boxes, choose the data that you want to display.
   - Click Configure View.

CHAPTER 17

Working with the Batch Queue

This chapter provides an overview of the batch queue and discusses how to use the batch queue.

Understanding the Batch Queue

The Batch Queue manages large amounts of forecast data without affecting other components or applications. For example, when a user submits a reconciliation report job, the Batch Queue manages the report job while the user continues to perform other tasks, such as viewing sales history data in the Consensus Conference Room.

By default, the Batch Queue page refreshes every ten seconds, to indicate the status of the jobs in the queue.

Batch Queue Status

After you submit a job, the Batch Queue displays the job ID, the job status the owner of the job and the date submitted. The available job status types are:

- Failed

  The job did not successfully run and did not generate output.

- Execute

  The job successfully ran and generated output.

- Pending

  The job was submitted and is waiting in the queue to run.

Multiple users can submit the same type of exception report or reconciliation report at the same time. The jobs reside in the queue with the status of pending until they run.

Deletion of Failed Jobs in the Batch Queue

You delete failed jobs from the Batch Queue to clear submitted jobs that did not successfully complete from the Batch Queue. After you delete a failed job from the Batch Queue, the associated report and its parameters remain in either the Exception or the Reconciliation page, depending upon the type of report that was submitted.

Disable the Auto-Refresh Feature in the Batch Queue

The Batch Server automatically refreshes every ten seconds. This enables you to view any jobs that were submitted from users of the same conference room. You can disable this feature.

Note. If the auto-refresh feature is disabled, you can enable it by clicking the Batch Queue tab from the main menu.

Using the Batch Queue

This section discusses how to:

- Monitor job progress in the Batch Queue.
- Delete failed jobs in the Batch Queue.
- Disable the auto-refresh feature in the Batch Queue.

See Also

Starting the Batch Server

Window Used when Using the Batch Queue

Form Name	Navigation	Usage
Consensus Conference Room Workshop	Click Batch Queue	Displays the Batch Queue page, which lists running and failed batch jobs.

Monitoring Job Progress in the Batch Queue

Access the Batch Queue page.

To monitor job progress in the Batch Queue, review these fields:

- Job ID
- Status
- Owner
- Submitted

Deleting Failed Jobs in the Batch Queue

Access the Batch Queue page.

To delete failed jobs in the Batch Queue:

1. Select the option next to the job that you want to delete.
2. Click Delete Failed Jobs.

Disabling Auto-Refresh in the Batch Queue

Access the Batch Queue page.

To disable the auto-refresh feature for the Batch Queue, select Stop Auto-Refresh on the Batch Queue page.

CHAPTER 18

Enterprise Forecast Report Management

This chapter provides an overview of Enterprise Forecast report management, and discusses how to:

- Generate an Enterprise Forecast report.
- Email an Enterprise Forecast report.

Understanding Enterprise Forecast Report Management

The print feature in the sub menus of the Workshop Forecast page enables you to generate an Enterprise Forecast report from the Accuracy and Compare modes. The report appears in a browser window from which you can select to print or email the report.

The Accuracy mode allows you to view forecast version history compared with sales history data. You can better understand the similarities and differences between the forecast data and actuals. The Compare mode allows you to view forecast version baseline data compared with forecast version data. You can better understand the baseline forecast version data compared with future forecast values.

You can generate and print an Enterprise Forecast report when you are viewing forecast data in the Accuracy and Compare pages. When generating and printing a report from either the Accuracy or Compare page, the Enterprise Forecast report captures the current forecast data from the page in which you are working.

The Enterprise Forecast report also displays:

- The report generation data.
- The name of the users who generated the report.
- Demand point location.
- Demand point annotations, if any exist.

If an Enterprise Forecast Report is generated and minimized, and a new demand point annotation is added to a forecast version, close the initial Enterprise Forecast Report window and generate a new one to view the report with the additional annotation.

Using your default email client, you can send the Enterprise Forecast report by page or email link. If you send the report using the page option, the receiver of the message can immediately view the report. If you send the report by email link, the receiver of the message must log into the application to view the report.

Generating Enterprise Forecast Reports Using the Accuracy Page

This section discusses how to generate an Enterprise Forecast Report using the Accuracy page.

Windows Used When Generating an Enterprise Forecast Report Using the Accuracy Page

Form Name	Navigation	Usage
Consensus Conference Room Workshop	Click Accuracy	Displays the Accuracy page, which displays the selected forecast data in a comparison table, as well as the percentage difference between forecast data. From this view you can print an Enterprise Forecast Report.
Consensus Conference Room Workshop	Click Compare	Displays the Compare page, which displays the selected forecast data in a comparison table. Displays the percentage difference between different forecast versions. From this view you can print an Enterprise Forecast Report.

Generating an Enterprise Forecast Report

Access the Accuracy page.

To generate an Enterprise Forecast report using the Accuracy page:

1. Select the baseline forecast version that you want to compare to sales history data from the Baseline view.
2. Select the forecast versions that you want to compare to Sales History data from the Comparison views.
3. Click View.
4. Select Print.

Generating an Enterprise Forecast Report Using the Compare Page

Access the Compare page.

To generate an Enterprise Forecast report using the Compare page:

1. Select the baseline forecast version from the Baseline view.
2. Select the forecast versions from the Comparison views.
3. Select Print.

Emailing Enterprise Forecast Reports

Access the Enterprise Forecast Report.

To email an Enterprise Forecast report:

1. Click File, and then select Send.
2. From the Send menu, select one of the following options:
   - Page by Email
   - Link by Email

   Your default email client opens. If you selected Page by email, the report page is embedded in the message body. If you selected Link by email, a URL link to the report appears.
3. In the To field, type the name or select the name from the drop-down list of the person to whom you are sending the message.
4. Type a message in the body of the message.
5. Click Send.

Glossary of JD Edwards EnterpriseOne Terms

activity	A scheduling entity in JD Edwards EnterpriseOne tools that represents a designated amount of time on a calendar.
activity rule	The criteria by which an object progresses from one given point to the next in a flow.
add mode	A condition of a form that enables users to input data.
Advanced Planning Agent (APAg)	A JD Edwards EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML.
application server	A server in a local area network that contains applications shared by network clients.
as if processing	A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.
alternate currency	A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction. In JD Edwards EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.
as of processing	A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various JD Edwards EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.
back-to-back process	A process in JD Edwards EnterpriseOne Supply Management that contains the same keys that are used in another process.
batch processing	A process of transferring records from a third-party system to JD Edwards EnterpriseOne. In JD Edwards EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than JD Edwards EnterpriseOne to JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to JD Edwards EnterpriseOne.
batch server	A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.
batch-of-one immediate	A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks. See also direct connect and store-and-forward.
business function	A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-JD Edwards EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules,

	and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.
business function event rule	See named event rule (NER).
business view	A means for selecting specific columns from one or more JD Edwards EnterpriseOne application tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.
central objects merge	A process that blends a customer's modifications to the objects in a current release with objects in a new release.
central server	A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical JD Edwards EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.
charts	Tables of information in JD Edwards EnterpriseOne that appear on forms in the software.
connector	Component-based interoperability model that enables third-party applications and JD Edwards EnterpriseOne to share logic and data. The JD Edwards EnterpriseOne connector architecture includes Java and COM connectors.
contra/clearing account	A general ledger account in JD Edwards EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in JD Edwards EnterpriseOne Financial Management.
Control Table Workbench	An application that, during the Installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.
control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
cost assignment	The process in JD Edwards EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.
cost component	In JD Edwards EnterpriseOne Manufacturing, an element of an item's cost (for example, material, labor, or overhead).
cross segment edit	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.
database server	A server in a local area network that maintains a database and performs searches for client computers.
Data Source Workbench	An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the system-release number data source. It also updates the Data Source Plan detail record to reflect completion.

date pattern A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.

denominated-in currency The company currency in which financial reports are based.

deployment server A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.

detail information Information that relates to individual lines in JD Edwards EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).

direct connect A transaction method in which a client application communicates interactively and directly with a server application.

See also batch-of-one immediate and store-and-forward.

Do Not Translate (DNT) A type of data source that must exist on the iSeries because of BLOB restrictions.

dual pricing The process of providing prices for goods and services in two currencies.

edit code A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.

edit mode A condition of a form that enables users to change data.

edit rule A method used for formatting and validating user entries against a predefined rule or set of rules.

Electronic Data Interchange (EDI) An interoperability model that enables paperless computer-to-computer exchange of business transactions between JD Edwards EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.

embedded event rule An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.

Employee Work Center A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages.

enterprise server A server that contains the database and the logic for JD Edwards EnterpriseOne.

EnterpriseOne object A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects.

EnterpriseOne process A software process that enables JD Edwards EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. JD Edwards EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.

Environment Workbench An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the system-release number data source. It also updates the Environment Plan detail record to reflect completion.

escalation monitor A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.

event rule A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.

facility An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a "business unit."

fast path A command prompt that enables the user to move quickly among menus and applications by using specific commands.

file server A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network users request files and make changes to these files.

final mode The report processing mode of a processing mode of a program that updates or creates data records.

FTP server A server that responds to requests for files via file transfer protocol.

header information Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.

interface table See Z table.

integration server A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.

integrity test A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.

interoperability model A method for third-party systems to connect to or access JD Edwards EnterpriseOne.

in-your-face-error In JD Edwards EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.

IServer service This internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client.

jargon An alternative data dictionary item description that JD Edwards EnterpriseOne appears based on the product code of the current object.

Java application server A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence.

JDBNET A database driver that enables heterogeneous servers to access each other's data.

JDEBASE Database Middleware A JD Edwards EnterpriseOne proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.

JDECallObject An API used by business functions to invoke other business functions.

jde.ini A JD Edwards EnterpriseOne file (or member for iSeries) that provides the runtime settings required for JD Edwards EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running JD Edwards EnterpriseOne. This includes workstations and servers.

JDEIPC Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

jde.log The main diagnostic log file of JD Edwards EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of JD Edwards EnterpriseOne.

JDENET A JD Edwards EnterpriseOne proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all JD Edwards EnterpriseOne supported platforms.

Location Workbench An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the system data source.

logic server A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when JD Edwards EnterpriseOne software runs.

MailMerge Workbench An application that merges Microsoft Word 6.0 (or higher) word-processing documents with JD Edwards EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.

master business function (MBF) An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.

master table See published table.

matching document A document associated with an original document to complete or change a transaction. For example, in JD Edwards EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.

media storage object Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.

message center A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user.

messaging adapter An interoperability model that enables third-party systems to connect to JD Edwards EnterpriseOne to exchange information through the use of messaging queues.

messaging server A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.

named event rule (NER) Encapsulated, reusable business logic created using event rules, rather that C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.

nota fiscal In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.

nota fiscal factura In Brazil, a nota fiscal with invoice information.

See also *nota fiscal.*

Object Configuration Manager (OCM) In JD Edwards EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.

Object Librarian A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of JD Edwards EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.

Object Librarian merge A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.

Open Data Access (ODA) An interoperability model that enables you to use SQL statements to extract JD Edwards EnterpriseOne data for summarization and report generation.

Output Stream Access (OSA) An interoperability model that enables you to set up an interface for JD Edwards EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.

package JD Edwards EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snapshot of the central objects on the deployment server.

package build A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in JD Edwards EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build.

Consider the following context: "Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions." The process of creating a package build is often referred to, as it is in this example, simply as "a package build."

package location The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.

Package Workbench An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the system-release number data source. It also updates the Package Plan detail record to reflect completion.

planning family A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.

preference profile The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.

print server The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.

pristine environment A JD Edwards EnterpriseOne environment used to test unaltered objects with JD Edwards EnterpriseOne demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

processing option A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.

production environment A JD Edwards EnterpriseOne environment in which users operate EnterpriseOne software.

production-grade file server A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.

program temporary fix (PTF) A representation of changes to JD Edwards EnterpriseOne software that your organization receives on magnetic tapes or disks.

project In JD Edwards EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.

promotion path The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):

11>21>26>28>38>01

In this path, *11* equals new project pending review, *21* equals programming, *26* equals QA test/review, *28* equals QA test/review complete, *38* equals in production, *01* equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.

proxy server A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.

published table Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

publisher The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

pull replication One of the JD Edwards EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers using JD Edwards EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.

QBE An abbreviation for query by example. In JD Edwards EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.

real-time event A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when certain transactions occur.

refresh A function used to modify JD Edwards EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.

replication server A server that is responsible for replicating central objects to client machines.

quote order In JD Edwards Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

	In JD Edwards Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
selection	Found on JD Edwards EnterpriseOne menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
Server Workbench	An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the system-release number data source. It also updates the Server Plan detail record to reflect completion.
spot rate	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
Specification merge	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification	A complete description of a JD Edwards EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
Specification Table Merge Workbench	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
store-and-forward	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
subscriber table	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
supplemental data	Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs. For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across JD Edwards EnterpriseOne systems.
table access management (TAM)	The JD Edwards EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
Table Conversion Workbench	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.
table conversion	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.
table event rules	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although JD Edwards EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
terminal server	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

three-tier processing The task of entering, reviewing and approving, and posting batches of transactions in JD Edwards EnterpriseOne.

three-way voucher match In JD Edwards Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.

transaction processing (TP) monitor A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.

transaction set An electronic business transaction (electronic data interchange standard document) made up of segments.

trigger One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.

triggering event A specific workflow event that requires special action or has defined consequences or resulting actions.

two-way voucher match In JD Edwards Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.

User Overrides merge Adds new user override records into a customer's user override table.

variance In JD Edwards Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.

In JD Edwards EnterpriseOne Project Costing and JD Edwards EnterpriseOne Manufacturing, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.

Version List merge The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.

visual assist Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.

vocabulary override An alternate description for a data dictionary item that appears on a specific JD Edwards EnterpriseOne form or report.

wchar_t An internal type of a wide character. It is used for writing portable programs for international markets.

web application server A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.

web server A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.

Windows terminal server A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows

terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

workbench A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the JD Edwards EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of JD Edwards EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench.

work day calendar In JD Edwards EnterpriseOne Manufacturing, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.

workflow The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.

workgroup server A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.

XAPI events A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and then calls third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when the specified transactions occur to return a response.

XML CallObject An interoperability capability that enables you to call business functions.

XML Dispatch An interoperability capability that provides a single point of entry for all XML documents coming into JD Edwards EnterpriseOne for responses.

XML List An interoperability capability that enables you to request and receive JD Edwards EnterpriseOne database information in chunks.

XML Service An interoperability capability that enables you to request events from one JD Edwards EnterpriseOne system and receive a response from another JD Edwards EnterpriseOne system.

XML Transaction An interoperability capability that enables you to use a predefined transaction type to send information to or request information from JD Edwards EnterpriseOne. XML transaction uses interface table functionality.

XML Transaction Service (XTS) Transforms an XML document that is not in the JD Edwards EnterpriseOne format into an XML document that can be processed by JD Edwards EnterpriseOne. XTS then transforms the response back to the request originator XML format.

Z event A service that uses interface table functionality to capture JD Edwards EnterpriseOne transactions and provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested to be notified when certain transactions occur.

Z table A working table where non-JD Edwards EnterpriseOne information can be stored and then processed into JD Edwards EnterpriseOne. Z tables also can be used to retrieve JD Edwards EnterpriseOne data. Z tables are also known as interface tables.

Z transaction Third-party data that is properly formatted in interface tables for updating to the JD Edwards EnterpriseOne database.

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