Demantra

Platform

COLLABORATOR WORKBENCH USER'S GUIDE

Version 7.0.2

CREATE DEMAND. MANAGE DEMAND. FULFILL DEMAND.

Collaborator Workbench User’s Guide
Version 7.0.2
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Collaborator Workbench User's Guide

Contents

Preface

This preface includes the following sections:

About This Manual

This manual, the *Collaborator Workbench User's Guide*, describes how to use Collaborator Workbench and Demantra Anywhere (remote login for Collaborator Workbench).

Note These products require separate licenses, and you may not have access to both of them.

It includes the following information:

- Basic introduction
- Managing tasks and performing collaborative tasks
- Using the Members Browser
- Customizing Collaborator Workbench for your own needs, including creating content panes
- Logging in remotely, via Demantra Anywhere, which provides access to most of the same features

Other User Manuals

Most Demantra customers use Collaborator Workbench together with other Demantra Web-based products, so you will probably also use one of the following manuals:

- *Demand Planner Web User's Guide*
- *Promotions Effectiveness User's Guide*
- *Demantra Settlement Management User's Guide*
- *TPMO User's Guide*

Depending upon your needs, you might also use the manuals for the desktop-based products:

- *Demand Planner User's Guide*
- *Demand Replenisher User's Guide*

For the System Administrator

Manual	Contents
Demantra Spectrum Administrator's Guide	• Overview of administrative tasks • Creating users and groups of users; maintaining security of menu items • Managing workflow instances • Managing the worksheets • Maintaining the database and using the Scheduler to schedule database procedures; wrapping database procedures • Using the desktop BLE user interface and defining safety stock • Configuring the menus and links in Collaborator Workbench • Upgrading the Demantra Spectrum license • Troubleshooting appendix

Other Documentation

The Demantra Spectrum documentation includes other manuals, mainly for use by people implementing a Demantra Spectrum solution:

Manual	Contents
Demantra Spectrum Release Notes	• New and changed features • Defects fixed in this release • Known defects in this release • Late-breaking information, as needed
Demantra Spectrum Installation Guide	• Hardware and software prerequisites • Running the Demantra Spectrum installer • Upgrading from a previous release • Starting the server and logging on • Initiating the Citrix Metaframe Server, if you use this product • Uninstalling Demantra Spectrum • Tips on configuration settings and on Tomcat (for demos)
Demantra Spectrum Concepts	• Detailed discussion of basic Demantra Spectrum concepts • Separate chapters with further conceptual details on configuring series, levels, worksheets, and so on • Overview of the implementation tools and process • Tips on information needed to hand off the solution to users and administrators
TPMO Demo Script	Standalone document to get readers acquainted with the TPMO application.
Demantra Spectrum Consultant's Guide	Information on configuring everything apart from the Analytical Engine.

Manual	Contents
Analytical Engine Guide for Demand Planning	Information on configuring the Analytical Engine, for use with Demand Planner Web, Demand Planner, and Demand Replenisher.
Analytical Engine Guide for Promotions Effectiveness	Applies to Promotions Effectiveness. Same general contents as *Analytical Engine Guide for Demand Planning*.
Demantra Spectrum Reference Guide	Provides reference material on the following: • Demantra Spectrum URLs • Parameters • Database procedures • Base data fields • Functions and operators used in server and client expressions • Theoretical forecast models • Workflow step types • Glossary

Location of HTML and PDF Manuals

All Demantra Spectrum manuals are available in PDF format, within the directory *Demantra_root*/**Documents**. To read a PDF file, use Adobe Acrobat version 4.0 or higher. These files are formatted for double-sided printing and contain color graphics (which can be printed in color or in black and white).

Most of the manuals are also available in HTML format, as follows:

Help Title	Contents
User Help	HTML versions of the following: • *Demand Planner Web User's Guide* • *Promotions Effectiveness User's Guide* • *Demantra Settlement Management User's Guide* • *Collaborator Workbench User's Guide* • Member Management and Chaining Management chapters from *Demand Planner User's Guide* • *Demantra Spectrum Administrator's Guide* • Combined glossary and index
Offline Help	Condensed version of the preceding, covering only the topics that apply to working offline.
Consultant Help	HTML versions of the following: • *Demantra Spectrum Concepts* • *Demantra Spectrum Installation Guide* • *Demantra Spectrum Consultant's Guide* • *Analytical Engine Guide for Demand Planning* • *Analytical Engine Guide for Promotions Effectiveness* • *Demantra Spectrum Administrator's Guide* • *Demantra Spectrum Reference Guide* • Combined glossary and index
Demand Planner Help	HTML version of the *Demand Planner User's Guide*.

Help Title	Contents
Demand Replenisher Help	HTML version of the *Demand Replenisher User's Guide*.

Each help file is contained in a subdirectory of *Demantra_root*/**Documents**. Each of these directories contains the file **helpset.htm**. To open the help, open that file from an internet browser.

In this release, there is no HTML version of the TPMO documentation.

For Customer Support

For customer support, call 1-866-Demantra (x501) or send email to **support@demantra.com**.

1 Getting Started with Collaboration

This chapter provides a quick introduction to Collaborator Workbench. It includes the following sections:

Note Collaborator Workbench requires another license in addition to Demand Planner Web, Promotions Effectiveness, and Settlement Management.

First-Time Logon

The first time you log onto Collaborator Workbench, Demantra Spectrum typically downloads and installs software. This operation is quick and occurs only once for each machine you use.

1. Open Microsoft Internet Explorer.
2. Enter the URL supplied by your system administrator. This URL probably has the following format:

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

   For example:

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

   Tip Your Windows **Start** menu may also include an option for starting Collaborator Workbench, which you can use instead.

3. In the **Log On** dialog box, enter your user name and password.
4. Click **Login**.
5. If the toolbar includes a link labeled **Click here to install Java Web Start**, click that link.

Next Demantra Spectrum prompts you to install JRE.

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

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

   Demantra Spectrum displays a dialog box that asks if you want to trust the signed application distributed by Demantra. The dialog box is slightly different depending on the setting of **client.activationMethod**.

   Note This dialog box is sometimes displayed as soon as Collaborator Workbench comes up. In other cases, you do not see it until you click a worksheet name.

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

Logging into Collaborator Workbench

If you have already performed the one-time setup (see “First-Time Logon” on page 1), then log on as follows.

To log into Collaborator Workbench

Your Windows Start menu may include a link to Collaborator Workbench. If so, use that. If not:

1. Open Microsoft Internet Explorer.
2. Enter the URL supplied by your system administrator. This URL probably has the following format:

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

   For example:

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

3. In the **Log On** dialog box, enter your user name and password.
4. Click **Login**.

   Collaborator Workbench comes up, displaying your personal page.

Tip

- You can use the following URL to bypass the login page:

  http://*server name/virtual directory***/portal/directLogin.jsp?user=***current user***&pass=***password*

  For example:

  http://frodo/demantra/portal/directLogin.jsp?user=dp&pass=dp

See also

"A Brief Tour of Collaborator Workbench" on page 4
"Logging Off" on page 10

Illegal Characters in Demantra Spectrum

Within Demantra Spectrum, do not use the following special characters:

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

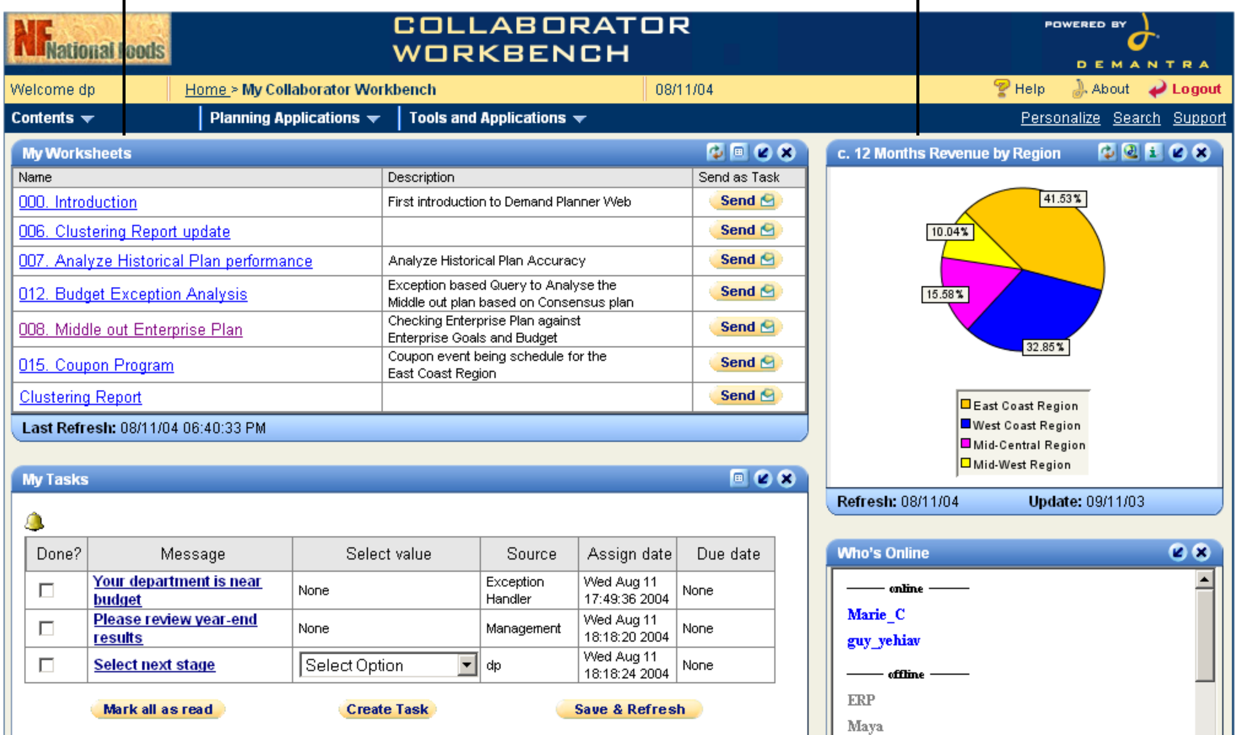
If you use these characters, unexpected results may occur.

A Brief Tour of Collaborator Workbench

Depending on how Collaborator Workbench is configured, it can include some or all of the elements shown in the following figure. You can configure all these elements for your own needs. For example, only a single content pane is shown here, but you can add as many as you need.

Worksheets you often use

Summary data (content) for a worksheet



Tasks currently assigned to you

Status of other users

Menus

Collaborator Workbench includes the following menus:

- The **Contents** menu lists all the content panes to which you have access and lets you create additional ones; see “Displaying a Content Pane” on page 27 and “Creating and Redefining Content Panes” on page 43.

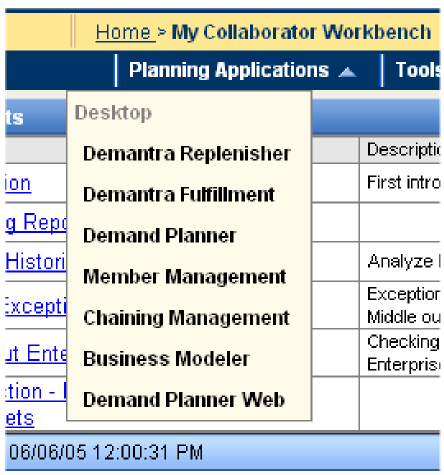
- Depending on how it has been configured, the **Planning Applications** and **Tools and Applications** menus may include links to the following tools:

Tool	For information
Demand Planner	*Demand Planner User's Guide*
Member Management	*Demand Planner User's Guide*
Chaining Management	*Demand Planner User's Guide*
Settlement Management	*Demantra Settlement Management User's Guide*
Business Modeler	*Demantra Spectrum Consultant's Guide*

You may or may not be able to use these tools, depending upon your permissions.

To access a menu item

1. Click the menu title. Then Collaborator Workbench displays the menu items in a small pop-up box.



2. Click the item you want.

To hide the menu

- Click the menu title again.

Or click another menu title, to open a different menu instead.

Links

The **Personalize** link brings up a wizard for customizing Collaborator Workbench; see "Configuring Your Default Layout" on page 38.

The other links vary from implementation to implementation and are not documented here.

My Worksheets

My Worksheets lists some or all of the worksheets to which you have access, specifically, the following worksheets:

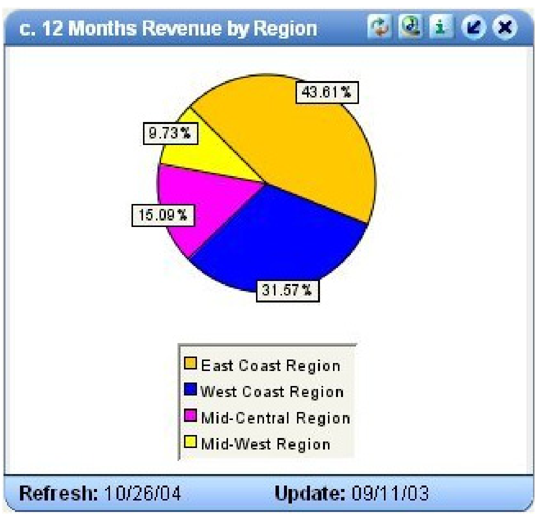
- Private and public worksheets that you own.
- Public worksheets where you and the owner are in the same collaborative group.

In **My Worksheets**, you can do several things:

- Click a worksheet to open it. For information on using worksheets, see the *Demantra Settlement Management User's Guide*, *Demand Planner Web User's Guide*, or *Promotions Effectiveness User's Guide*.
- Refresh the list of worksheets, by clicking the refresh button.
- Specify which worksheets to display in this pane; see "Configuring My Worksheets" on page 40.
- Send a worksheet as a task to another Collaborator Workbench user; see "Creating and Sending a Task" on page 16.

Content Panes

Collaborator Workbench often includes *content panes*, sometimes called *content* for short. A content pane displays a graphical view of data associated with a worksheet, to provide you with current, at-a-glance information that meets your needs, as in the following example.



You can display content in formats such as the following:

- Members Browser, which is a collapsible tree hierarchy of data levels
- Tabular format
- Chart formats including line, bar, and pie charts
- Calendar format

For more information, see “Using Content Panes” on page 19 and “Types of Content Panes” on page 21.

My Tasks

My Tasks lists tasks that have been assigned to you within Collaborator Workbench.

In Collaborator Workbench, a *task* is a unit of work associated with a worksheet, which in turn corresponds to a set of data. A task can come either from another user or from automated processes that have been set up especially for your enterprise. When you receive a task, your goal is to open the associated worksheet, examine the data, adjust or approve it as necessary, and then mark the task as done. Then Collaborator Workbench automatically continues with the needed follow-up processes.

In **My Tasks**, you can do several things:

- Click a task to open it. Then see “Managing Tasks” on page 11.
- Specify how many tasks to display and how to sort them. See “Configuring My Tasks” on page 39.

Who’s Online

Who’s Online shows the status of other users of Collaborator Workbench who belong to the same collaborative groups as you.

To send an email to a contact

- In the **Who’s Online** pane, double-click the name of the contact that you want to send an email to.

  The email application opens with a new message to the contact.

Note If you do not have an email application installed, then you will receive an error message when you try to send a message to another user.

See also

“Managing the Collaborator Workbench Page” on page 7
“Opening a Worksheet in Collaborator Workbench” on page 8
“Personalizing Collaborator Workbench” on page 37

Managing the Collaborator Workbench Page

The Collaborator Workbench page includes a set of panes, each of which you can hide or display as follows.

To minimize a pane

Click the minimize button in the upper right of the pane.

The pane is then hidden apart from its title bar.

To restore a minimize pane

Click the restore button in the upper right of the pane.

To refresh the data in a pane

Click the refresh button in the upper right of the pane.

Not all panes include this feature; **Who's Online** and **My Tasks** are automatically updated with changes. The other panes are updated only when you specifically refresh them.

To close a pane

Click the close button in the upper right of the pane.

To redisplay a pane, see “Personalizing Collaborator Workbench” on page 37

Opening a Worksheet in Collaborator Workbench

When you open a worksheet from within Collaborator Workbench, you launch Settlement Management, Demand Planner Web, or Promotions Effectiveness, whichever you are licensed to use.

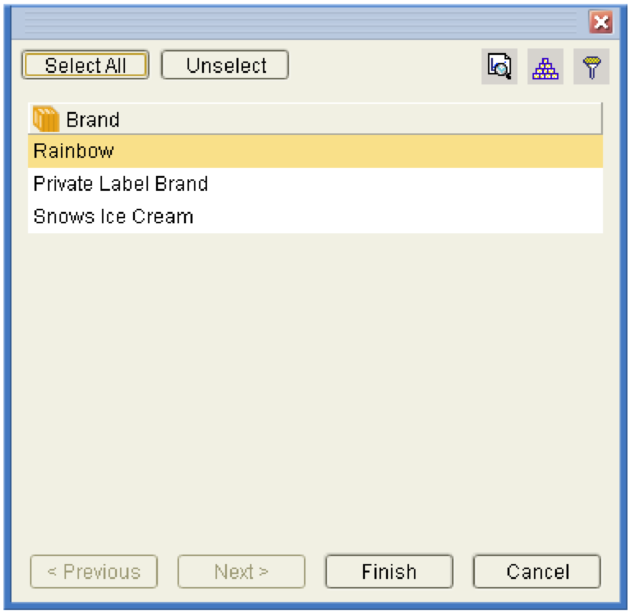
To display My Worksheets

If Collaborator Workbench does not currently display **My Worksheets**, do the following:

1. Click the **Personalize** link in the upper right of Collaborator Workbench.
2. Click the check box next to **My Worksheets** and then click **Next**.
3. Click **Next** again and then click **Finish**.

To open a worksheet

1. Click a worksheet within **My Worksheets**. Or click the Open button on the upper right of a content pane.
2. Depending on how the worksheet was configured, you may now be prompted to filter the data. In this case, one or more selection pages are displayed when the worksheet is opened, as follows:



   a. On each selection page, select one or more choices or click **Select All** to select the whole list.

   b. Click **Next** or click **Finish**.

   For information on using a worksheet, see the *Demand Planner Web User's Guide* or *Promotions Effectiveness User's Guide*.

To run or rerun a worksheet

Depending on how Demantra Spectrum was configured, it may or may not automatically run the worksheet that you open.

- Within the worksheet, click **Data** > **Rerun**.

See also

"Configuring My Worksheets" on page 40

Typical Use of Collaborator Workbench

With Collaborator Workbench, the overall workflow would typically be as follows:

1. Log onto Collaborator Workbench, as in “Logging into Collaborator Workbench” on page 2.
2. Open a worksheet, as in “Opening a Worksheet in Collaborator Workbench” on page 8. When you open a worksheet, you automatically open Settlement Management, Promotions Effectiveness, or Demand Planner Web, whichever you are authorized to use.
3. View **My Tasks**. Each task includes a link to a worksheet that you open and work with as described previously. Open the worksheet and make changes or review the data as necessary. Then mark the task as **Done** so that the automated workflow can continue.

   See “Managing Tasks” on page 11.
4. Send tasks to other users, as necessary.
5. Log off Collaborator Workbench.

Outside of Collaborator Workbench, you usually receive tasks via the email system that your enterprise uses. The email message includes a link to a worksheet that you open and work with as described previously.

Logging Off

If you log off from Collaborator Workbench, you are automatically logged off from Settlement Management, Promotions Effectiveness, or Demand Planner Web, if you had launched that.

To log off from Collaborator Workbench

Do any of the following:

- Click **Logout**.
- Click **Home**.
- Close the browser.

2 Managing Tasks

This chapter describes how to view, work with, and create tasks in Collaborator Workbench. It includes the following sections:

Note Collaborator Workbench requires another license in addition to Settlement Management, Promotions Effectiveness, or Demand Planner Web.

About Tasks

In Collaborator Workbench, tasks enable you to send work items to other users, to share information and to interact with the automated demand chain processes. Tasks appear in the **My Tasks** module. A task usually corresponds to a worksheet that you send to another user or receive from another user. The task also can include a short message, links to Web sites, and attached files.

Note When you receive a task, you might also receive an email notification in your email system, if the sender has selected this as an option.

The underlying Workflow Engine also sends tasks, generally to alert you of exceptions, provide forecasts, or communicate messages and information during appropriate circumstances.

Types of Tasks

There are three types of tasks:

- User tasks, which are sent to bring information to the attention and treatment of individual users.
- Selection tasks, which present a list of options for you to choose among. Each choice directs the Workflow Engine to continue in a different way.
- Group tasks, which are sent for the attention and treatment of all users from a specific group defined in the workflow instance. Each user in the group receives the task. Users can respond individually to the task.

Only the Workflow Engine can send a selection task or group task; that is, your implementors have set up workflows to include such tasks, to meet the needs of your organization.

Task Timeout Procedures

Tasks that are sent to you by the Workflow Engine may also have a timeout period. This means that if you do not mark the task as done before the due date, then the task will expire or *time out*. Then the Workflow Engine continues with an alternative procedure.

User Tasks and Selection Tasks

A user task times out if the user does not mark the task as done before the response period has ended. The timeout procedure for a user task is as follows:

1. The user is sent an email notification that the task has timed out.
2. The task is removed from the user’s task list.
3. The Workflow Engine continues with an alternative procedure that has been defined within the workflow for this circumstance.

Group Tasks

A group task times out if one or more of the users in the group do not mark the task as done before the response period has ended. The timeout procedure for a group task is as follows:

1. A user who is responsible for the relevant task receives an email message notification of all the users within the group that have not marked the task as done. For example, this may be the group manager, or a supporting job function.
2. The task stays in the **My Tasks** module of the users who have not marked it as done.
3. The Workflow Engine continues with an alternative procedure that has been defined within the workflow for this circumstance.

Task Timeout Alert

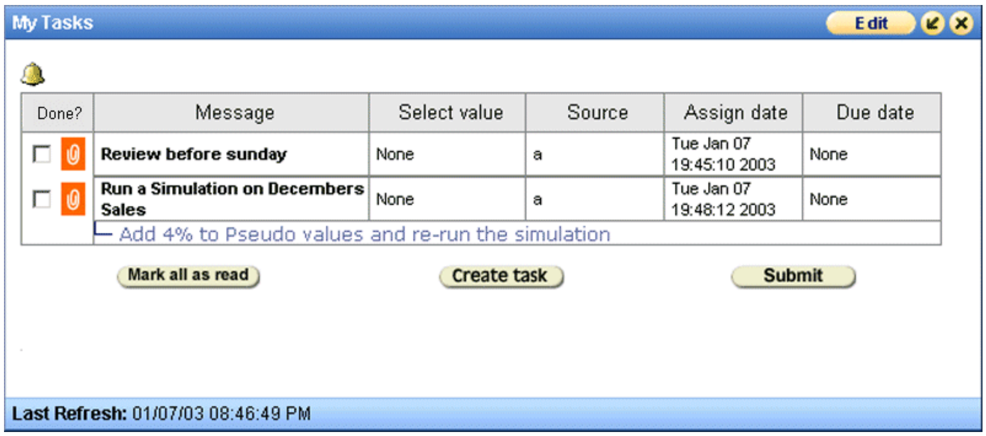
If you see that a task due date is written in red text, then that is an indication that the response period has nearly ended and the task is going to time out fairly soon.

See also

“Viewing Tasks Assigned to You” on page 13
“Addressing a Task” on page 15
“Creating and Sending a Task” on page 16

Viewing Tasks Assigned to You

In Collaborator Workbench, a *task* is a unit of work, usually associated with a worksheet. A task can come either from another user or from automated workflows that have been set up especially for your enterprise. All unaddressed tasks assigned to you are listed in a module called **My Tasks**, which looks like the following:



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

To refresh My Tasks

- Click **Save & Refresh** in the **My Tasks** module.

  Any changes made in **My Tasks** are communicated to the Collaborator Workbench engine.

  The date and time of your last **My Tasks** refresh is shown in the lower right corner of the **My Tasks** display.

The **My Tasks** module is initialized when it is first displayed, but it is not automatically updated when new tasks arrive. Also, when you make changes in this module, they are not immediately communicated to the Collaborator Workbench engine.

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

To view all assigned tasks

The **My Tasks** module does not necessarily display all your tasks. To check for additional tasks:

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

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

To display My Tasks

If Collaborator Workbench does not currently display **My Tasks**, do the following:

1. Click **Personalize.**
2. Click the check box next to **My Tasks** and then click **Next**.
3. Click **Next** again and then click **Finish**

See also

"About Tasks" on page 11
"Configuring My Tasks" on page 39
"Opening a Task" on page 14
"Addressing a Task" on page 15

Opening a Task

When you are sent a task, it brings with it information that is relevant to you. The information may be a Collaborator Workbench worksheet, a Demantra Spectrum component worksheet, a link to another Web site, or an attachment. You should view all the information that is sent with the task before you respond.

For each task, **My Tasks** includes the following information:

- The **Message** field. This can contain a link to a Web site or a worksheet.
- An **Assign Date** field that shows when the task was sent to you.
- **A Due Date** field that shows the date by which the task should be completed, if applicable. If you do not complete a task by its due date, Demantra Spectrum automatically continues with actions as specified by your implementors.

Note	If a task due date is displayed in red, the response period for that task has nearly ended and the task is going to time out fairly soon.

- A **description** field that describes more details about the task.
- The **Attachment** button that indicates that a file has been attached to the task. The suitable application for viewing the attachment is started in a separate window.

To open a task

- Click the task link in the **My Tasks** module.

  A new browser window opens with the link destination.

The task link can be a Web page that contains more information about the task that you are viewing. If the link is to a worksheet, then Demand Planner Web or the Demantra Spectrum component will open without requiring a separate login.

To view an attachment to a task

- Click the Attachment button beside the task.

  The attachment opens with the appropriate application in a new window or a message box appears asking if you want to open the attachment from its source or save it.

See also

“Addressing a Task” on page 15

Addressing a Task

In general, you address a task in two stages:

1. Examining the associated worksheet and editing or approving data as appropriate. How you do this depends upon your organizational needs.
2. Marking the task as done so that the Workflow Engine can continue with the workflow.

Note When you receive a task, the Workflow Engine waits until the task status has been changed to **Done** before continuing with the workflow instance. It is therefore very important that you mark tasks as done after you have attended to the task requirements.

To mark a task as done

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

1. First:
   - For a regular task, click the check box to the left of the task.
   - For a selection task, select the appropriate response from the dropdown list in the **Select value** column. The check box next to the task is automatically checked.
2. Click the **Save & Refresh** link at the bottom of the task list.

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

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

To cancel the done status

If you have not yet refreshed the **My Tasks** list, you can cancel your change:

- For a regular task, clear the check box next to the task whose status you want to change from done incomplete.
- For a selection task, use the dropdown box to select a response from the list.

To mark all tasks as read

- Click **Mark Tasks as Read**.

  The bold emphasis is removed from the text in the list. This does not occur automatically when a task is marked as Done.

See also

"Opening a Task" on page 14

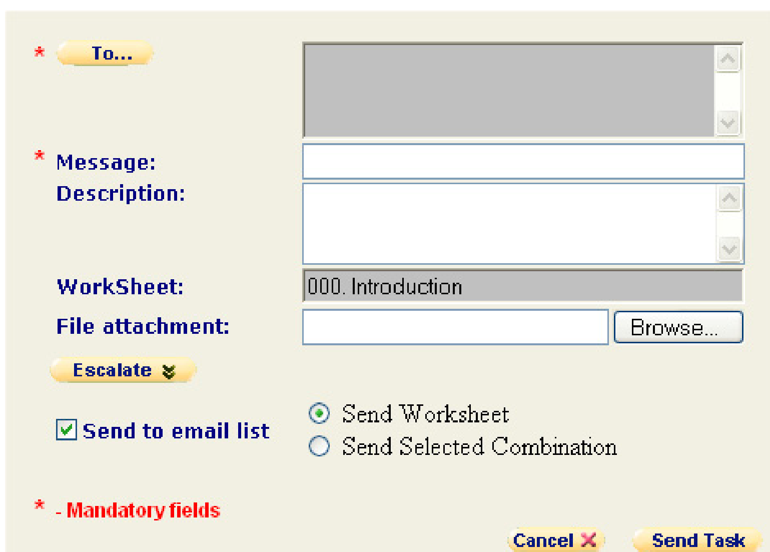
Creating and Sending a Task

Depending on how your Collaborator Workbench has been configured, you may be able to create tasks.

To create and send a task

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

   The **Send Task to User** dialog box appears.



2. Click **To.....** and select the users and/or groups to receive the task.
3. In the **Message** field, type a short text message.

   This will be the task message that the recipient sees. The worksheet that you are sending will be added automatically as a link from the **Message** text.
4. In the **Description** field, type a short description.

   This description will be displayed below the task message in the recipient's **My Tasks** module.
5. To link the task subject line to a Web page, enter the full path to the file in **URL** field.

   Note You must enter the full URL, including server name and directory hierarchy. The **http://** part will be added automatically if omitted.
6. To attach a file to the task, enter the path to the file in the **File Attachment** field or use the **Browse** button to find it.
7. To ensure that this task is completed by a specific time, click **Escalate** and then provide the following information:

Due Date	Date and time by which this task must be completed
Alert Time	Date and time at which an alert will be displayed
To	Additional email addresses
8. To send an email notification to the recipient of the task, select the **Send email list** check box. (Depending on how your system has been configured, this option may not be available.)
9. Click either **Send Worksheet** or **Send Selected Combination** to specify whether to filter the worksheet. If you click **Send Selected Combination**, the worksheet is filtered to the combination that you are currently viewing; otherwise, the entire worksheet is sent.
10. Click **Send Task**.

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

Resolving a Failed Task

When a workflow fails, the Workflow Engine automatically sends a selection task to user who initiated that workflow. This task provides options for continuing. (The Workflow Engine also sends email to the person who initiated that workflow.)

To resolve a failed task

1. Within **My Tasks**, find the failed task, which is displayed with the options to **Retry**, **Continue**, or **Abort**.
2. Try to identify the cause of the failure.

   A failure can happen for a variety of reasons, for example, an invalid worksheet or user, a database communication error, the Web server being down, or failure of an invoked external application. Check for such error conditions.
3. Specify how to proceed.
   - If you have corrected the underlying problem and you want to rerun the step that failed, click **Retry**.
   - If you have corrected the underlying problem and have performed the failed step manually, click **Continue**.
   - If you want to cancel execution of this workflow instance, click **Abort**.
4. Click the **Save & Refresh** link at the bottom of the task list.

If you cannot determine the cause, gather as much related information as possible, and contact Demantra Customer Support.

3 Using Content Panes

A content pane displays read-only data from a worksheet. Content panes give you ready access to key information. This chapter describes how to display, create, and manage these panes. It includes the following sections:

Note Collaborator Workbench requires another license in addition to Settlement Management, Promotions Effectiveness, or Demand Planner Web.

Overview of Content Panes

In addition to core items (**My Tasks**, **My Worksheets**, and **Who's Online**), you usually display some *content panes* (or *content*) within Collaborator Workbench.

A content pane displays a graphical view of data associated with a worksheet, to provide you with current, at-a-glance information that meets your needs. You can display content in formats such as the following:

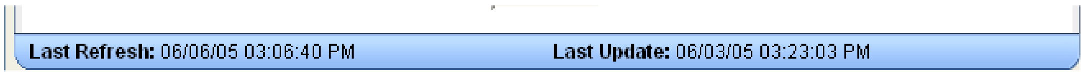
- Members Browser, which is a collapsible tree hierarchy of data levels
- Tabular format
- Chart formats including line, bar, and pie charts
- Calendar format

You use content panes to view simultaneously many presentations of demand chain information. Each content pane can be filtered to suit your needs. And you can make content panes made available to other users so that you can share your work with your enterprise partners.

Refresh and Update Dates

The bottom of each content pane shows two dates:

- **Last Refresh** is the last date and time when data was reloaded into this pane. Unlike the core panes (**My Worksheets**, **My Tasks**, and **Who's Online**), a content pane is updated only when you refresh the pane. See "Refreshing a Content Pane" on page 29.
- **Last Update** is the last date and time when this content pane was redefined.



Worksheets and Content Panes

Worksheets and content panes are related to each other. All content panes are available as worksheets, but not all worksheets are available as content panes. Part of the definition of a worksheet includes a check box that enables the worksheet to be displayed as a content pane; if this check box is enabled, it is possible to specify what the content pane looks like.

See "Creating and Redefining Content Panes" on page 43.

For information on the worksheets to which you have access, see "My Worksheets" on page 6.

Editing Data in Content Panes

The data in the pane is read-only (except for in a Members Browser). In order to edit the data, you must open the worksheet associated with it.

See also

"Displaying a Content Pane" on page 27
"Configuring Your Default Layout" on page 38
"Opening the Associated Worksheet" on page 29

Types of Content Panes

This section provides an overview of the types of content panes and allowed variations. Any content pane can include filtering and exceptions.

Members Browser Content Pane

A Members Browser is a collapsible tree hierarchy of data levels, like the following example:

You use this content pane for the following general purposes:

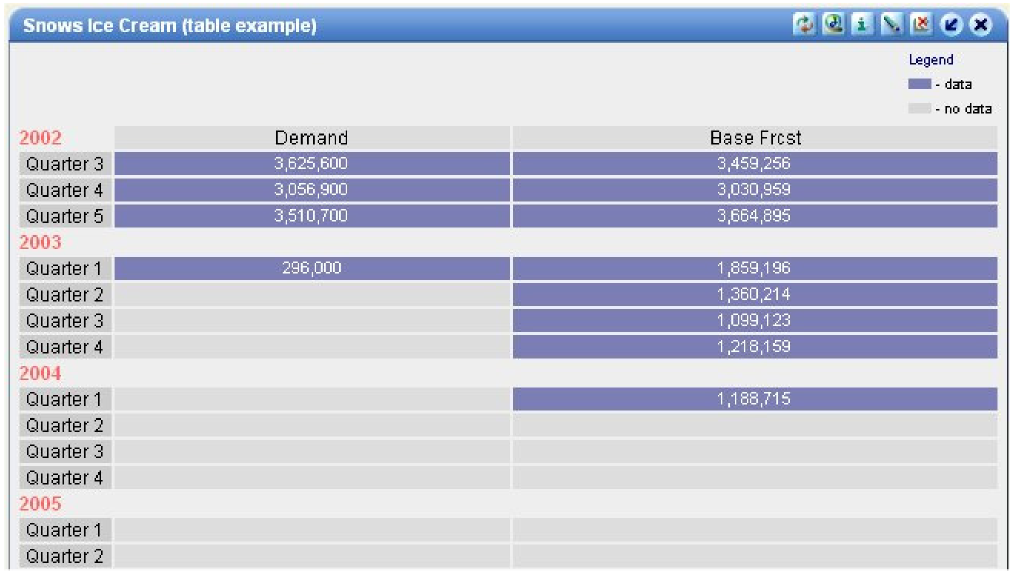
- To launch worksheets
- To view the attributes of a member.
- To create, edit, and delete members.
- To perform additional operations on members, as defined within your implementation.

See “Using a Members Browser Content Pane” on page 31.

Note This is the only type of content pane where you can make changes. The other content panes are purely informational.

Table Content Pane

A content pane can display data in a tabular format, like the following example:



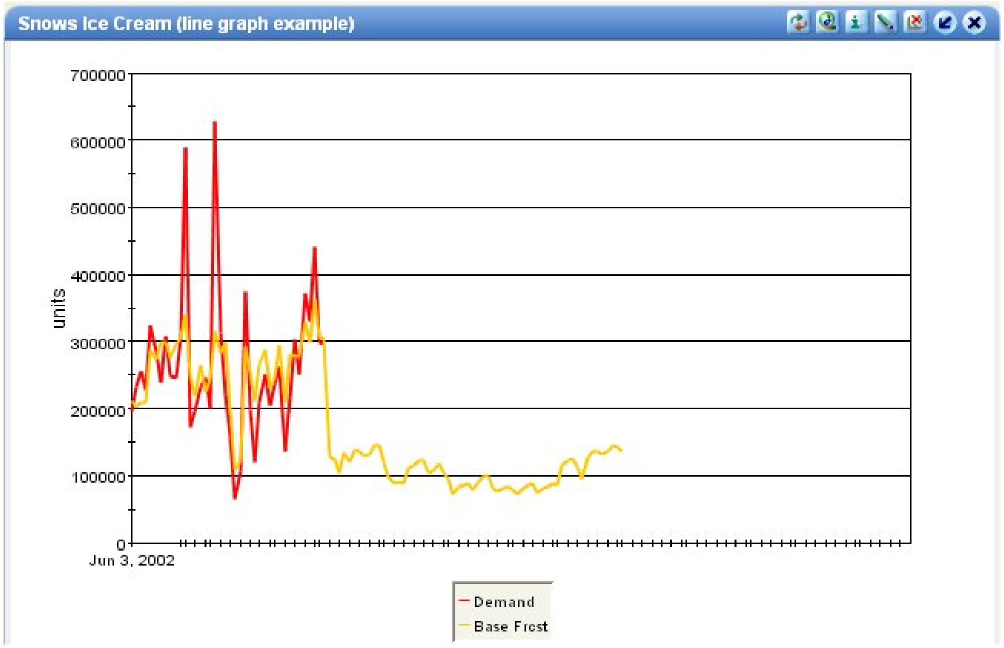
2002	Demand	Base Frcst
Quarter 3	3,625,600	3,459,256
Quarter 4	3,056,900	3,030,959
Quarter 5	3,510,700	3,664,895
2003		
Quarter 1	296,000	1,859,196
Quarter 2		1,360,214
Quarter 3		1,099,123
Quarter 4		1,218,159
2004		
Quarter 1		1,188,715
Quarter 2		
Quarter 3		
Quarter 4		
2005		
Quarter 1		
Quarter 2		

Here the data is filtered to show a single brand (Snows Ice Cream) and is aggregated across that brand and all locations. In a case like this, it is helpful to use the title of the content pane to indicate how the data is filtered.

A table-style content pane cannot display data in crosstab format; that is, it cannot list SKUs or stores across the x- or y-axis. In contrast, a table in a worksheet can display data in that format.

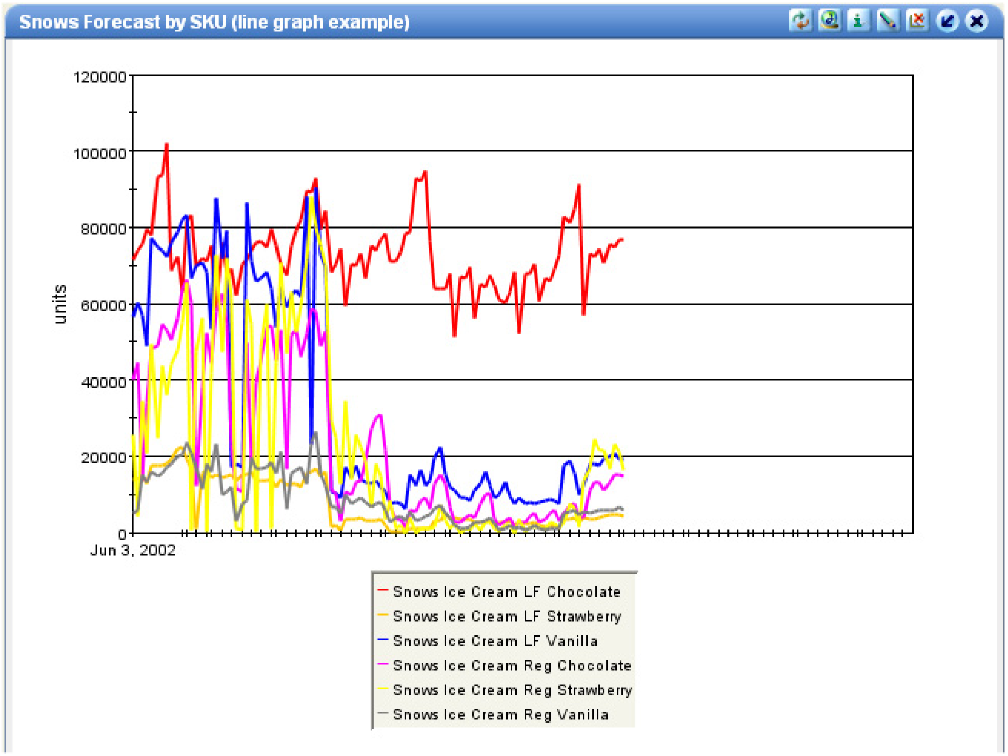
Line Chart Content Pane

A content pane can display data in a line chart. A couple of variations are possible. You can display multiple series for a single member or a single combination, as follows:



Here each line represents a series. The data is filtered to show a single brand (Snows Ice Cream) and is aggregated across that brand and all locations. In a case like this, it is helpful to use the title of the content pane to indicate how the data is filtered.

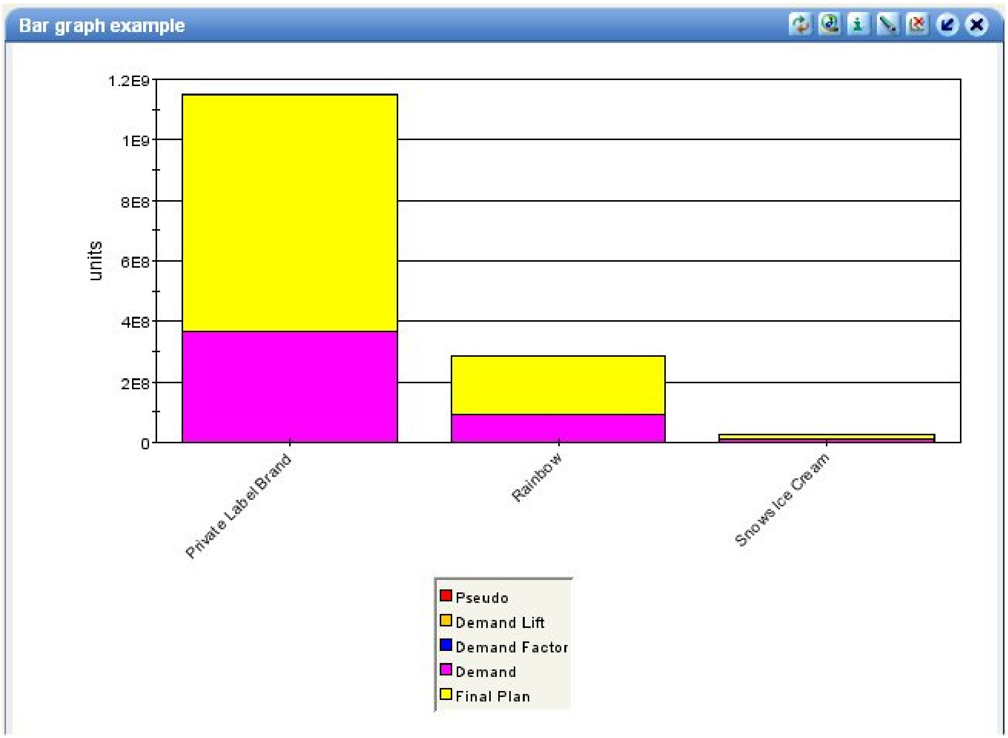
Alternatively, you can display a single series for multiple members or combinations, as follows:



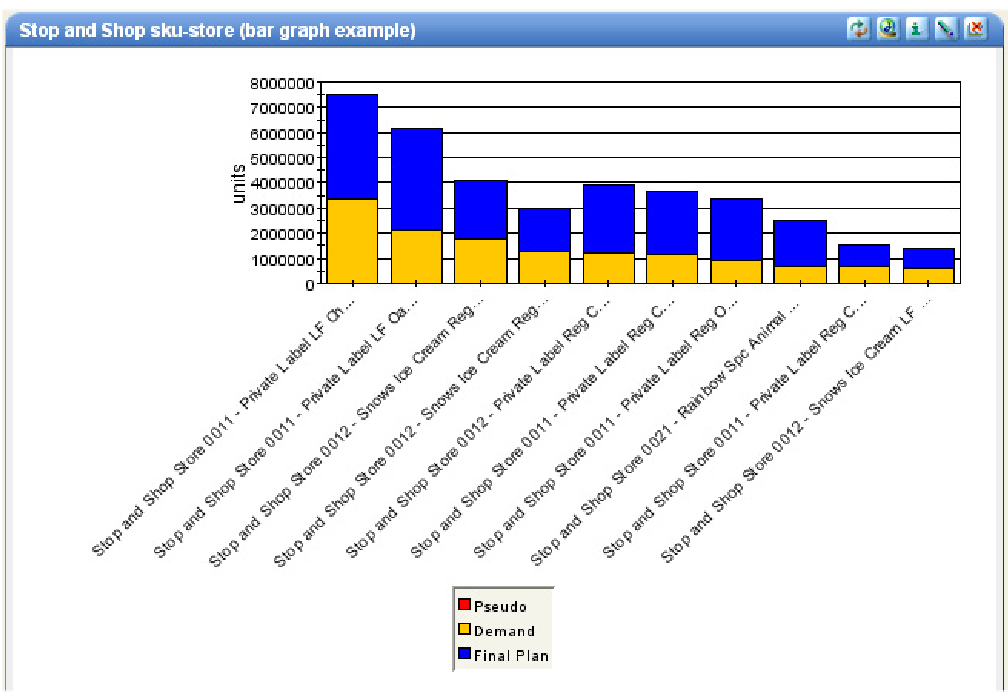
Here each line represents the forecast for a single SKU, aggregated across all locations where that SKU is sold. Alternatively, the chart could show a single line for each SKU at each store; other variations are possible. To show data separately for multiple items or multiple locations, you can include only one series.

Stacked Bar Chart Content Pane

A content pane can display data in a stacked bar chart, as in the following example:



In a content pane of this type, each series is shown in a separate color, chosen by the system. Each member or each combination is shown as a separate bar. In the preceding example, data is shown for three brands, and the chart has three bars. In contrast, in the next example, data is shown for ten SKU-store combinations.

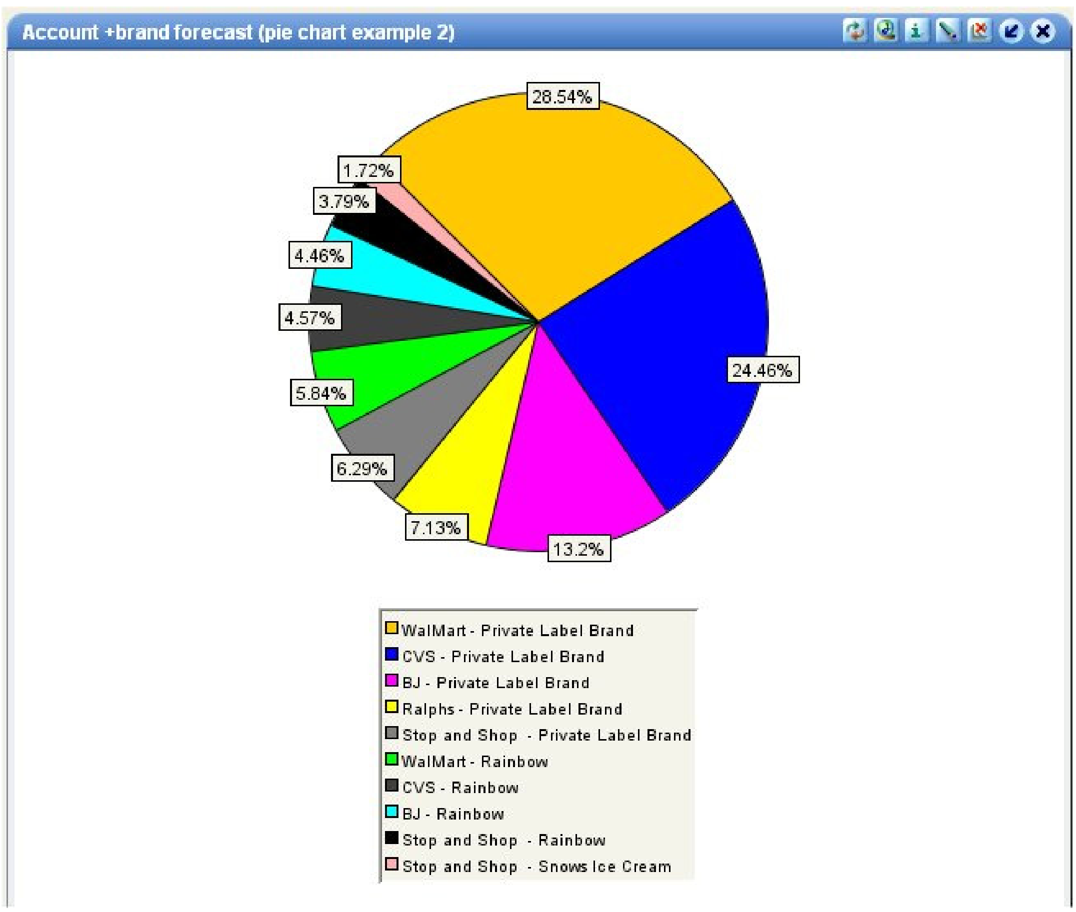


Filtering of Stacked Bar Charts

Because of the limitations of screen space, Demantra Spectrum automatically applies a filter to any stacked bar chart. By default, it displays the top ten members (or combinations) that have the highest demand.You can configure this filter to choose, for example, the five stores with the lowest return rates, if your system contains such data.

Pie Chart Content Pane

A content pane can display data in a pie chart, as in the following example:



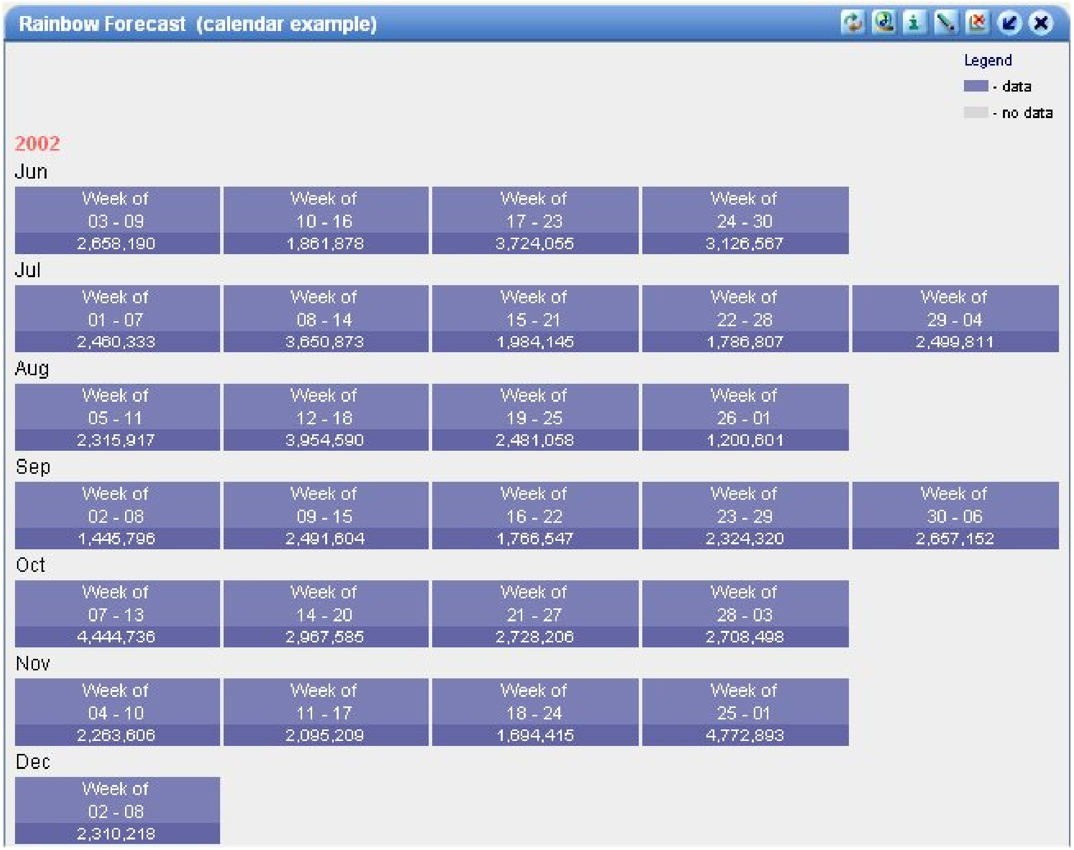
Within a content pane, a pie chart works as follows:

- Only one series may be displayed (it is helpful to include the series name in the title of the content pane).
- You can include any number of aggregation levels. The pie chart displays one wedge for each resulting combination. Colors are chosen by the system.

Within worksheets, pie charts are more somewhat flexible, because more screen space is available.

Calendar Content Pane

A content pane can display a calendar that shows the values of one series, as in the following example:



For this type of content pane, you include a single series, whose values are shown for each time bucket in the calendar. Depending on your implementation, you can choose the size of time bucket to use: week, month, quarter, and so on. It is helpful to use the title of the content pane to indicate which series is displayed and how that is filtered.

Displaying a Content Pane

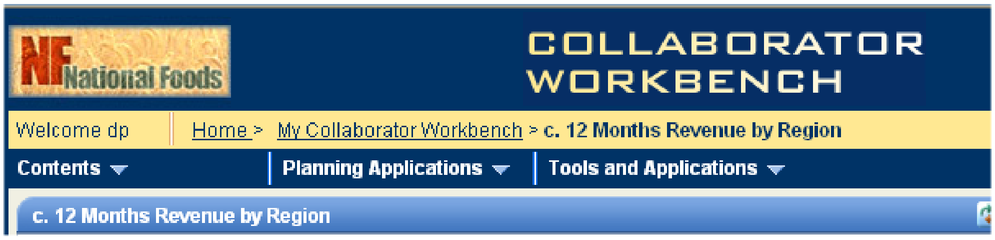
You can display a content pane in either of two ways:

- By temporarily displaying the pane without affecting your default layout.
- By changing your default layout to include the content pane.

To temporarily display a content pane

You can temporarily display a content pane without changing your default layout.

1. Click the **Contents** menu and then click the name of the worksheet, from the list of available content panes.
2. Collaborator Workbench displays the selected content in the wide area (the left side), in place of any other panes in that area.



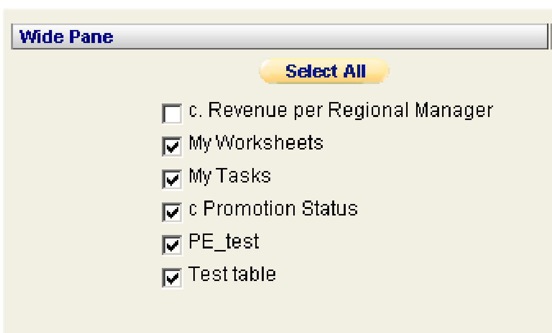
Note the change in the title bar. Also note that the narrow area is left as is.

3. To restore your default layout, click the **My Collaborator Workbench** link in the title bar.

To change your default layout to display a content pane

1. Click the **Personalize** link.

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



2. Click the check box next to the content pane you want to display.

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

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

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

4. Click **Next**.

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

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

See also

“Overview of Content Panes” on page 19
“Creating and Redefining Content Panes” on page 43
“Opening the Associated Worksheet” on page 29

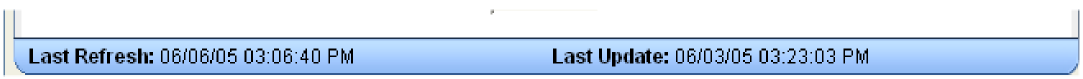
Refreshing a Content Pane

When you first display a content pane, it contains the most recent data. However, after that, the data is static and does not refresh automatically. Also note that the content panes are *not* refreshed when you use the browser’s refresh function.

To refresh a content pane

- Click the **Refresh** button at the top of the content pane.

  The content pane reloads with the most recent data, and Demantra Spectrum changes the **Last Refresh** date.



Opening the Associated Worksheet

Each content pane is associated with a corresponding worksheet. If you need to edit the data, you must open the worksheet to do so, because the content pane is read-only.

To open a worksheet associated with a content pane

- Click the open button in the upper right of the pane.

See also

Demand Planner Web User’s Guide
Promotions Effectiveness User’s Guide

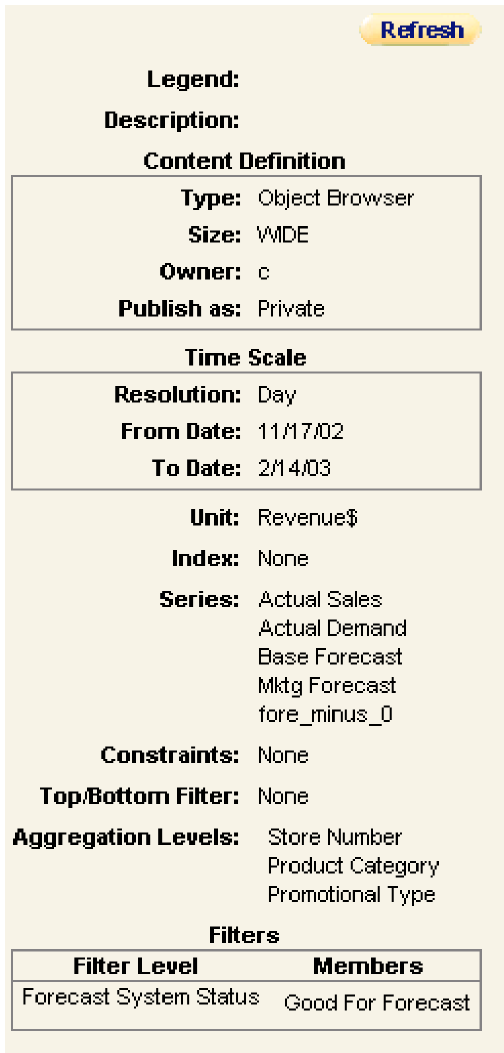
Viewing the Definition of a Content Pane

The **Info** page displays information about the worksheet whose results are currently being displayed in a content pane.

To view content Info

- Click the information button in the upper right of the content pane.

  The **Info** page appears.

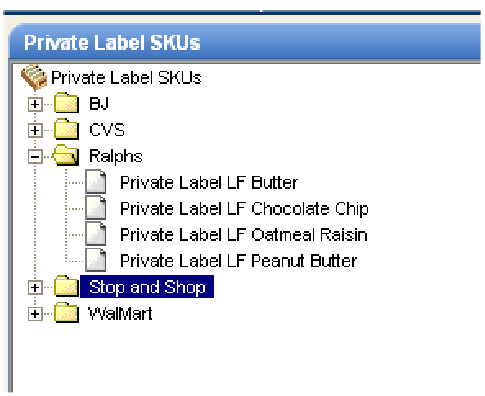


4 Using a Members Browser Content Pane

You can use a Members Browser to maintain the members of the levels, launch worksheets, and perform other operations.

Introduction to the Members Browser

A content pane may include the Members Browser, which looks like the following:



You use this content pane for the following general purposes:

- To launch worksheets
- To view the attributes of a member.
- To create, edit, and delete members.
- To perform additional operations on members, as defined within your implementation.

These options are available on the right-click menu.

Launching a Filtered Worksheet

Depending on how your system has been configured, you may be able to open a worksheet from within a Members Browser; the worksheet is filtered to show only data relevant to the member from which you started.

The specific options are usually different for each aggregation level in your system.

To open a member in a worksheet

Do one of the following in a Members Browser:

- Right-click the member and then select **Open**. In this case, you are using the default worksheet associated with this level.
- Right-click the member and then select **Open With** and then select a worksheet.

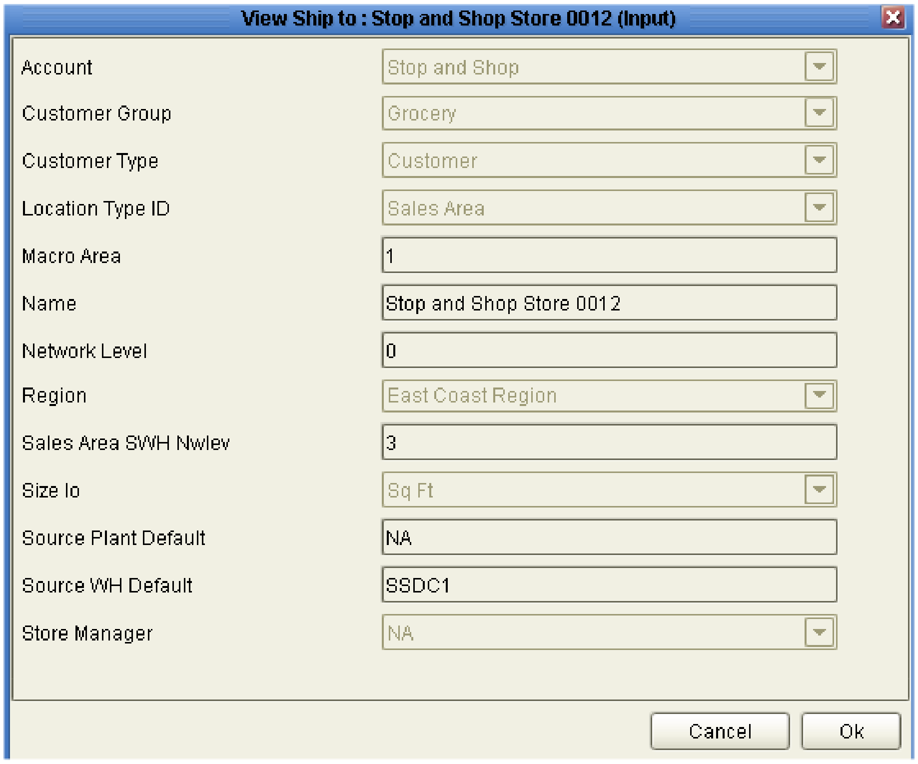
The worksheet appears in a new window.

Viewing the Attributes of a Member

To view the attributes of a member

1. In a Members Browser, do the following:
2. Right-click a member and click **View** (for example, View Ship to).

Demantra Spectrum displays a dialog box like the following:



The attributes shown in red are required. These include the **Name** attribute and all immediate parents of this member.

About Creating, Editing, and Deleting Members

For any level, most or all members are defined by data that is imported into Demantra Spectrum. For example, the brands in your system are defined by the imported sales records, which include information about the brand of each item that is sold. The imported data specifies the attributes of the existing members.

Depending on your authorization, you might be able to edit or delete existing members and add new members of a given level. Permission is set separately for each level and potentially for each user.

If you make any of these changes, you should be aware of how Demantra Spectrum interacts with your corporate systems. Demantra Spectrum periodically imports data about sales, items, and locations from your other systems. Each time data is imported into your system, the changes you have made to the levels are overwritten, depending on the kind of change.

- You should edit or delete existing members only if you are expecting the same change to occur in the imported data, and you need to see the change right away within Demantra Spectrum for some reason.
- If you add members, they will be kept when data is imported.

Creating a Member

To create a member

1. Do one of the following within a Members Browser:
   - Right-click an existing object and then select **New** (for example, New SKU).
   - Right-click the blank area and then select the appropriate option.

   Demantra Spectrum displays a window where you specify the name of the new member, as well as its parent levels and other attributes.
2. For **Name**, specify a unique name.
3. The rest of the fields prompt you for values of attributes associated with this level; the fields shown in red are required. The specific attributes you see depend upon your configuration.
4. Click **Create**.

Note You cannot see the new member in the Members Browser, because the Members Browser displays only item-location combinations that exist and that have sales.

Modifying a Member

You can modify a member by changing its name, the parent members to which it belongs, and any visible attributes.

To modify a member

1. In a Members Browser, do the following:
2. Right-click a member and click **Edit** (for example, Edit SKU). Then make changes as needed; see “Creating a Member” on page 34 for details.
3. Click **Finish**.

See also

“About Creating, Editing, and Deleting Members” on page 33

Deleting a Member

To delete a member

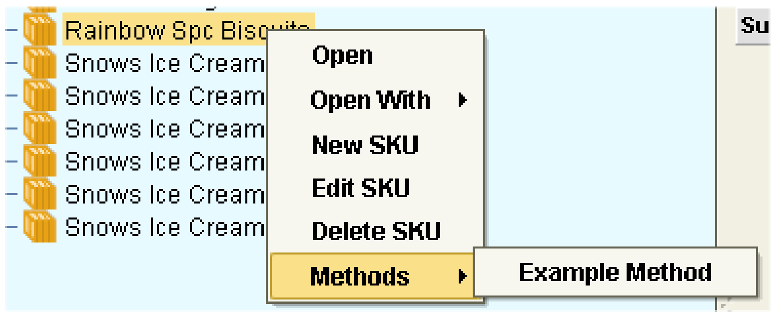
1. In a Members Browser, right-click a member and click **Delete** (for example, Delete SKU).
2. Demantra Spectrum prompts you to confirm the action. Click **Yes** or **No.**

See also

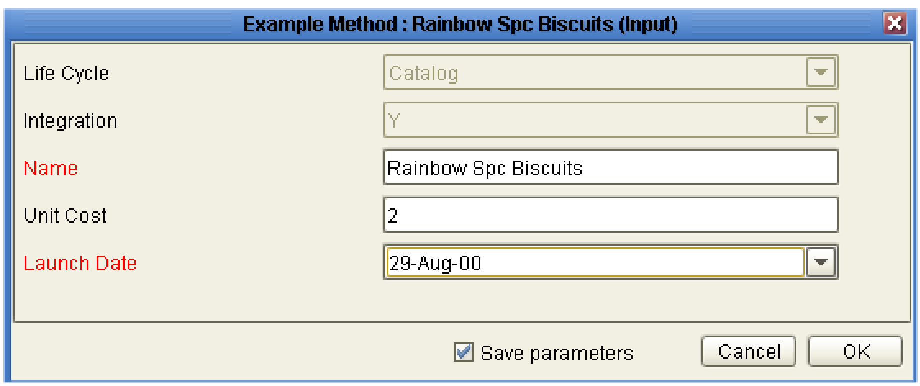
"About Creating, Editing, and Deleting Members" on page 33

Using Other Right-Click Menu Options

Depending on your implementation, the right-click menu may include a **Methods** submenu that includes additional options created by your implementors:



When you click one of these options, Demantra Spectrum displays a dialog box like the following:



Click the **Save parameters** check box if you want to save the attribute changes to the database when the method is run.

For information on any such menu items, please contact your implementors or your designated Demantra Spectrum system administrator.

5 Personalizing Collaborator Workbench

This chapter describes how to personalize your Collaborator Workbench page. It includes the following sections:

See Also

"Creating and Redefining Content Panes" on page 43.

Note Collaborator Workbench requires another license in addition to Settlement Management, Promotions Effectiveness, or Demand Planner Web.

Overview

You can set up Collaborator Workbench to display any information you want to see. You can specify which modules you want to see and open as many modules as you like, each module showing different information. By positioning required modules in the wide and narrow panes you will be able to view information that is important to you together on one page.

You can configure the position of a modules on the Web page and also the way the information contained in the modules is presented. You can configure **My Tasks** and **My Worksheets** to specify which worksheets are shown and how many tasks are be listed.

Configuring Your Default Layout

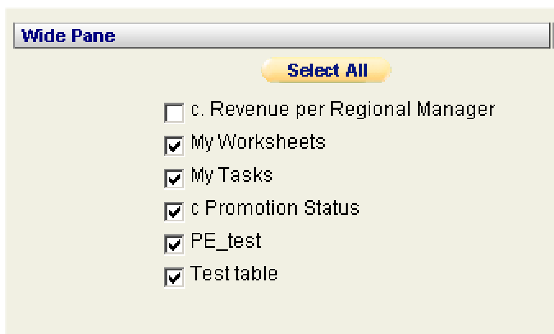
The Collaborator Workbench page includes a wide pane and a narrow pane, and each pane has a possible set of modules that it can display. You choose the modules and their display order, top to bottom.

Note Your choices here affect your default layout in both Collaborator Workbench and Demantra Anywhere.

To personalize your default layout

1. Click the **Personalize** link.

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

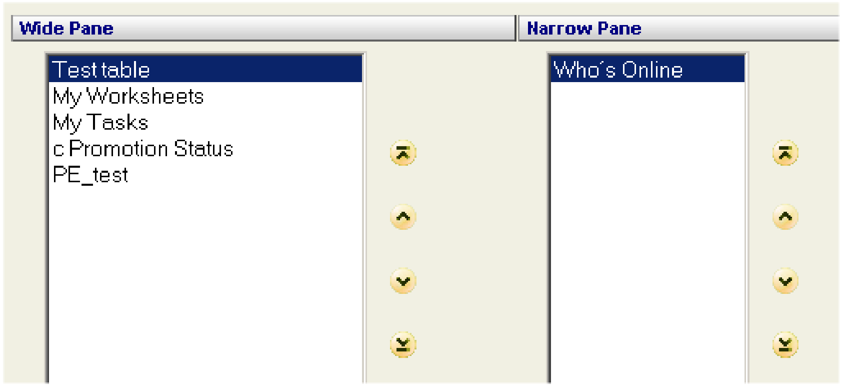
   These lists include the following:

   - **My Tasks** and **My Worksheets**, which can be displayed only in the wide pane.
   - **Who's Online**, which can be displayed only in the narrow pane.
   - Worksheets that have been defined as content and to which you have access. When a worksheet is defined as content, it is defined as belonging to the wide pane or the narrow pane. If you own the worksheet, you can change this; see "Creating and Redefining Content Panes" on page 43.

2. In each list, use the check boxes to select or deselect the modules that you want to see.

3. Click **Next**.

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



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

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

5. Click **Next**.

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

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

Configuring My Tasks

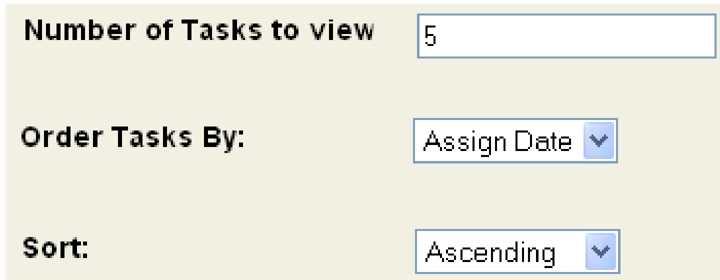
You can configure the number of tasks to appear in **My Tasks**. You can order tasks by the different task fields and decide how many tasks you would like displayed. In this way you can, for instance, show the last few tasks that you have been sent, or the oldest ones.

To configure My Tasks

1. If Collaborator Workbench is not currently displaying **My Tasks**, then display it as described in “Configuring Your Default Layout” on page 38.

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

Collaborator Workbench displays a page like the following:



3. In the **Number of Tasks to View** field, type the maximum number of tasks that you want to see in **My Tasks**.
4. From the **Order Tasks by list, select** the field that you want to list the tasks by.
5. From the **Sort** dropdown menu, select the sorting order that you want for the tasks. Task fields can be listed in either ascending or descending order.
6. Click **Finish**.

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

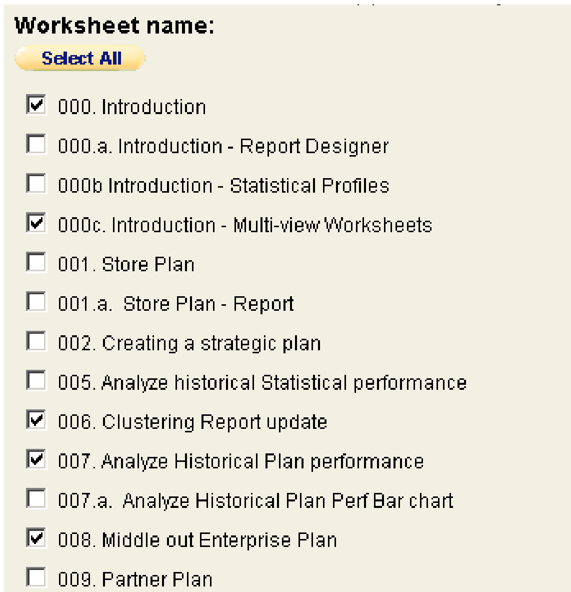
Configuring My Worksheets

You can configure how many and which worksheets are shown in **My Worksheets**.

To configure My Worksheets

1. If Collaborator Workbench is not currently displaying **My Worksheets**, then display it as described in “Configuring Your Default Layout” on page 38.
2. In **My Worksheets** module, click the personalize button in the upper right corner.

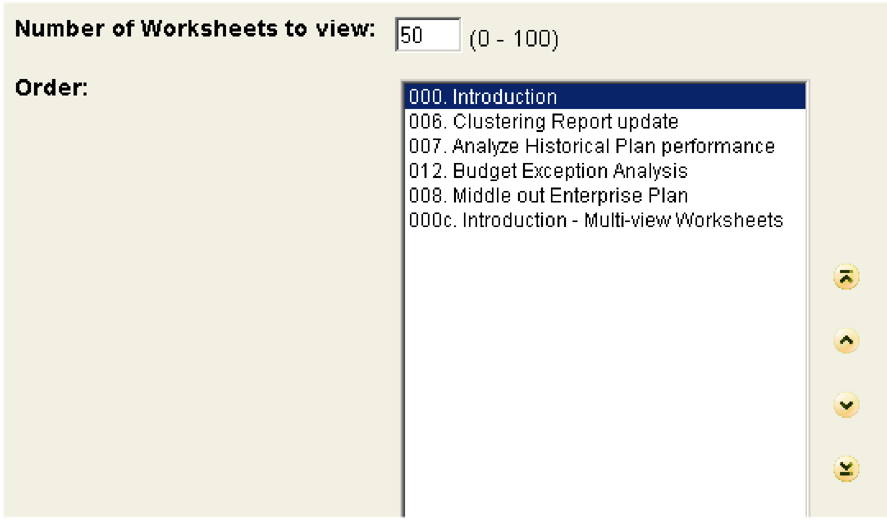
Collaborator Workbench displays a list of all available worksheets. This includes all worksheets you own and all public worksheets.



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

4. Click **Next**.

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



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

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

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

6 Creating and Redefining Content Panes

This chapter describes how to create and redefine content panes. It includes the following sections:

Creating or Editing Content Panes

To create a new content pane

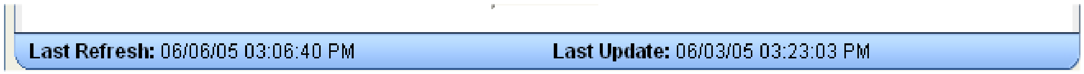
- Click **Contents** > **New...**

To edit an existing content pane

1. Display the content pane in Collaborator Workbench; see “Displaying a Content Pane” on page 27.

2. At the top of the pane, click the Edit button.
3. Make changes in the content pane editor; see “Introduction to the Content Pane Editor” on page 44.
4. Click **Save**.

When you change the definition of a content pane, Demantra Spectrum changes the **Last Update** date for that content pane.



Introduction to the Content Pane Editor

The content pane editor is the same tool that you use to create worksheets (in Demand Planner Web, for example), and some of the options apply only to worksheets, as noted in this documentation.

The content pane editor has a set of buttons on the left, which you use to open different pages with different purposes:

Button	Purpose	For details, see...
Display	Specify basic information about the content pane.	“Configuring the Basics” on page 46
Series	Select series to include.	“Selecting Series on a Content Pane” on page 48
Time	Specify time resolution of content pane and span of time to consider.	“Specifying the Time Resolution and Time Span” on page 50
Aggregation Levels	Optionally specify aggregation levels to include, which controls which members and combinations are displayed.	“Specifying Aggregation Levels” on page 52
Filters	Optionally filter the data in the content pane.	“Filtering the Content” on page 57
Exceptions	Optionally apply exception filters to further filter the worksheet.	“Applying Exception Filters” on page 58
Layout Designer	*Does not affect the content pane* (affects only worksheets).	

Here you have the following options:

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

Rules of Types of Content Panes

Depending on the format of the content pane, you may or may not be able to select multiple series and levels. The following table summarizes the applicable rules for each type of content pane.

Type	Aggregation levels	Series
Members Browser	Select any number of levels.	Select one series (required for technical reasons; it is ignored).
Table	Do not select any levels.	Select any number of series.
Line chart	Variation 1: Do not select any levels.	Select any number of series.
	Variation 2: Select any number of levels.	Select only one series.
Bar chart	Select any number of levels.	Select any number of series.
Pie chart	Select any number of levels.	Select one series.
Calendar	Do not select any levels.	Select one series.

Also:

- For all types of content panes, there are no restrictions on the options on the Time, Filters, or Exceptions screens.
- The Layout screen has no effect on any content pane.
- For content panes that permit multiple levels, the Aggregation screen controls the order in which the levels are used. (For worksheets, the order of the levels here is ignored, because the Layout screen is used.)

Working with Lists

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

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

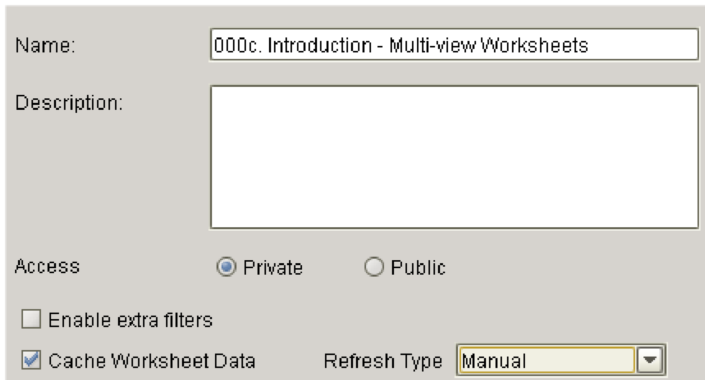
- To move all elements from one list to the other, click one of the double arrow buttons, as appropriate.
- To move a single element from one list to the other, click the element and then click one of the single arrow buttons, as appropriate. Or double-click the element.
- To move several adjacent elements,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

Configuring the Basics

To configure basic information for a content pane

1. Start the content pane editor; see “Creating or Editing Content Panes” on page 43.

   The first screen lets you specify the following basic information:



Name	The title to use for this content pane.See “Tips for titles of content panes” on page 47.
Description	Applies only to worksheets.
Access	Select **Private** or **Public**. Private is for your use only. Public content panes are available to all users in the group.
Enable Extra Filters	Applies only to worksheets.
Cache Worksheet Data	Applies only to worksheets.

2. Check **Content** and then complete the following fields:

Display Format	Specifies the display format to use. See “Types of Content Panes” on page 21.
Location	Select **Wide Pane** or **Narrow Pane** to determine where the content pane will be displayed in Collaborator Workbench.

Top/Bottom Filter

(Only for bar charts.) Specifies how to filter the members or combinations for display in the bar chart (to save space, not all members are shown). See "Filtering of Stacked Bar Charts" on page 26.

- Use the dropdown menu to specify whether the filter should apply to the top-ranked or to bottom-ranked members.
- In the input field, specify the number of members to be included.
- For **Criteria Series**, select the series that Demantra Spectrum should use to rank the members. (This does not control the order in which they are displayed in the chart.)

Note: If multiple items have identical values, all of them are displayed, and they collectively count as 1 towards the total. For example, suppose top values were 200, 150, 150, 100, and 50. If you specified Top/Bottom filter as three, you would see a total of four items: both the 150 items, in addition to the 200 and 100 items.

Tips for titles of content panes

To save space, the content panes do not include as many labels as you see in worksheets. The following table summarizes what is shown in each kind of content pane and provides suggestions for titles that provide the missing information; your actual needs may vary.

Type	Labels displayed in the pane	Suggestions for pane title
Members Browser	Names of the level members. For example, if you display SKUs and stores, the SKU and store names are shown.	
Table	Name of each series.	A useful title would indicate how these series are aggregated and filtered.
Line chart with multiple series	Name of each series.	A useful title would indicate how these series are aggregated and filtered.
Line chart with a single series	Name of each member or combination, as appropriate.	A useful title would indicate the name of the series.
Bar chart	Name of each series. Name of each member or combination, as appropriate.	

Type	Labels displayed in the pane	Suggestions for pane title
Pie chart	Name of each member or combination, as appropriate.	A useful title would indicate the name of the series.
Calendar	Name of each time bucket.	A useful title would indicate the name of the series.

Selecting Series on a Content Pane

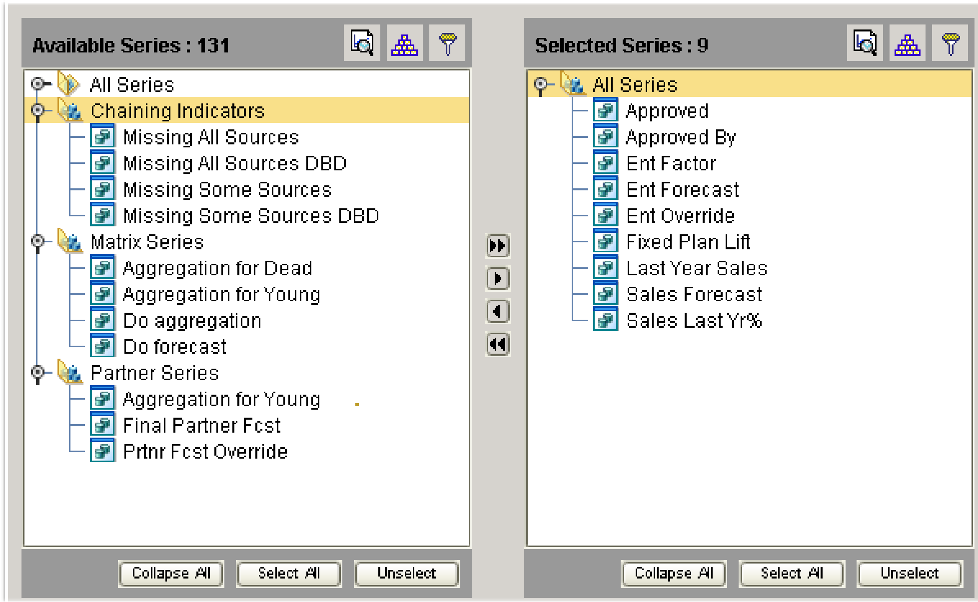
For technical reasons, every content pane must include at least one series. Depending on the format of the content pane, you may or may not be able to select multiple series. The following table summarizes the applicable rules

Type	Series
Members Browser	Select one series (it is ignored).
Table	Select any number of series.
Line chart	• If you plan to select any levels, select only one series. • Otherwise, select any number of series.
Bar chart	Select any number of series.
Pie chart	Select one series.
Calender	Select one series.

To specify the series on a content pane

1. Start the content pane editor; see “Creating or Editing Content Panes” on page 43.
2. Click **Series**.

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



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

4. Remove any series from the **Selected Series** list that you do not want to include on the worksheet.

Notes You cannot remove a series from a worksheet if that worksheet uses it as the Criteria Series for bar chart content. See Step 2 on page 46.

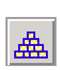
Currently, Collaborator Workbench chooses the color to use for each series in the graphs.

Managing the Series Lists

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

Note This section applies only to the series page of the content pane editor.

To sort a list of series



1. Click the Sort button.

   The **Sort** dialog box is displayed.

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

3. Click **OK**.

To filter a list of series

1. Click the Filter button.

   The Filter page appears.
2. Click **Add**.
3. Click the arrow to the right of the operator box and select an operator from the dropdown list.
4. In the number box, enter the value by which to filter the list.
5. (Optional) You may filter further by using the **AND** relationship.
6. Click **OK**.

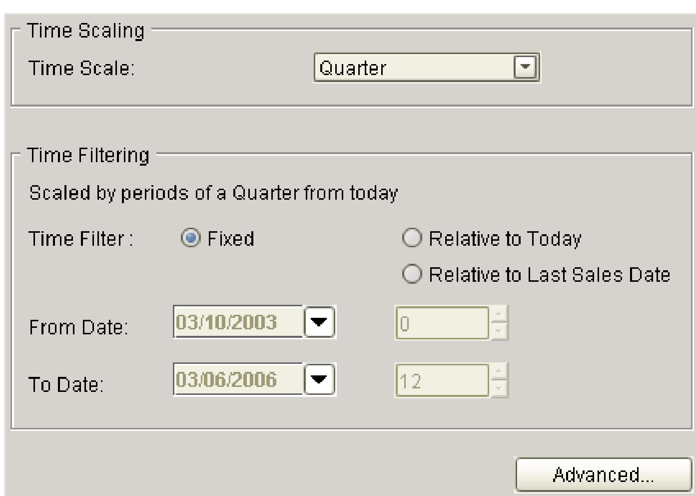
To find a series

1. Click the Find button.

   The **Find** dialog box appears.
2. In the **Find where** box, select the name of the list to search.
3. In the **Find what** box, type name of the series.
4. Select **Up**, **Down** or **All** to determine the direction of the search.
5. (Optional) Select one or more of the check boxes:
   - **Whole Word: Search for the exact match of a word.**
   - **Match Case: Search for the exact match of a word (case sensitive).**
6. Click **Find Next** to begin (or continue) searching.

Specifying the Time Resolution and Time Span

You use the **Time** dialog box to specify the time resolution of the content pane and to decide the span of time to which the content pane applies.

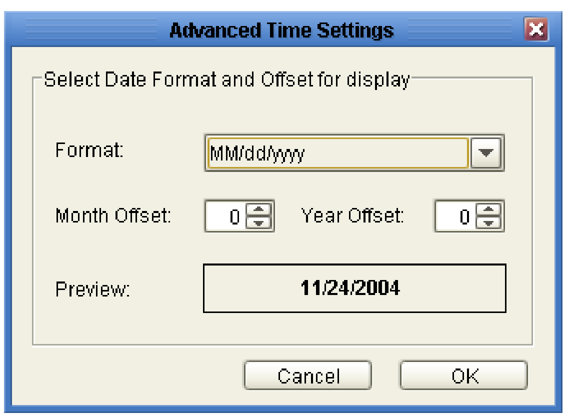


To specify time criteria

1. Start the content pane editor; see "Creating or Editing Content Panes" on page 43.
2. Click **Time**.
3. In the **Time Scale** box, specify the time resolution of the content pane. The data in the content pane is aggregated to this time resolution. That is, this option specifies the period of time that each data point in the content pane represents.
4. In the **Time Filter** box, specify the time period to which the content pane applies:
   - **Fixed** if you always want the content pane to show a specific time range, regardless of the current date.
   - **Relative to Today** if you always want the content pane to show a time range relative to today.
   - **Relative to Last Sales Date** if you always want the content pane to show a time range relative to the last sales date in the loaded data.
5. In the **From Date** and **To Date** boxes, enter values depending on the time filter you have chosen, as follows:

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

6. To control how dates are displayed in the content pane, click the **Advanced** button, which brings up the following dialog box:



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

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

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

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

c. Click **OK**.

Note

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

Specifying Aggregation Levels

Depending on the format of the content pane, you may or may not be able to select levels; this in turn controls which members and combinations are displayed in the pane. The following table summarizes the applicable rules.

Type	Aggregation levels
Members Browser	Select any number of levels.
Table	Do not select any levels.
Line chart	• If you plan to select more than one series, do not select any levels. • If you plan to select only on series, select any number of levels.
Bar chart	Select any number of levels.
Pie chart	Select any number of levels.
Calender	Do not select any levels.

If you do not specify any aggregation levels in a worksheet, the data is completely aggregated across all items and locations (but of course, it may be filtered; you can filter any kind of content pane).

To specify the aggregation levels in a content pane

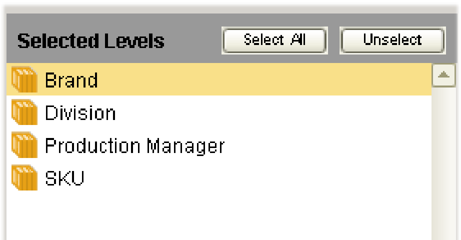
1. Start the content pane editor; see “Creating or Editing Content Panes” on page 43.
2. Click **Aggregation**.

The system displays the **Available Levels** and **Selected Levels** lists.

3. Move all aggregation levels that you want into the **Selected Levels** list, using any of the techniques in “Working with Lists” on page 45.

Note For content panes that permit multiple levels, this screen controls the order in which the levels are used. (For worksheets, the order of the levels here is ignored, because the Layout screen is used.)

4. Remove any unwanted levels from the **Selected Levels** list.



See also

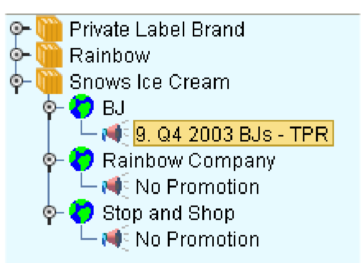
“Using the Advanced Selection Options” on page 53
“Changing the Overall Scale or Unit of Measure” on page 55

Using the Advanced Selection Options

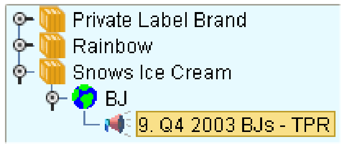
By default, if a content pane includes a promotion level, the pane selects all the following combinations:

- Combinations that have both sales data and promotions
- Combinations that have sales data, but no promotions
- Combinations that have promotions, but no sales data

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

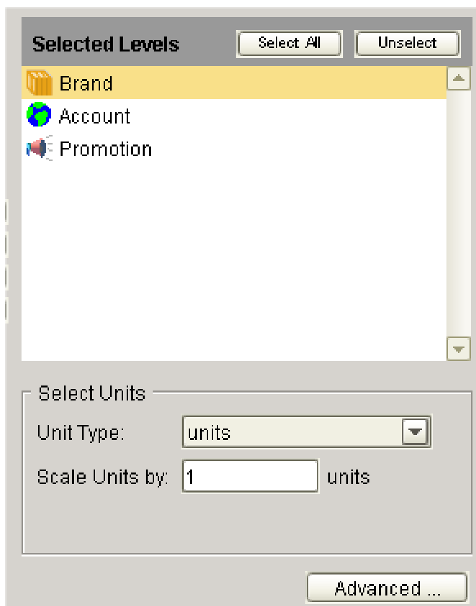


You can exclude some of these combinations. For example, you might want the pane to include only the combinations that have both sales and promotions, as follows:

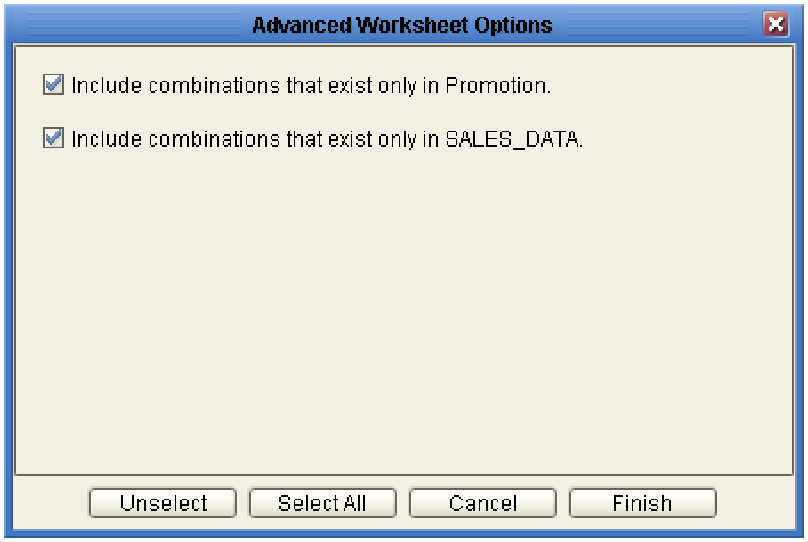


To exclude combinations that are normally included

1. Start the content pane editor; see “Creating or Editing Content Panes” on page 43.
2. Click **Aggregation**.
3. Make sure that the worksheet includes at least two levels, one of which should be a promotional level. When you do so, the screen displays an **Advanced** button in the lower right.



4. Click **Advanced**. Demantra displays a dialog box with additional options.



Include combinations that exist only in Promotion	This option selects combinations that have associated promotions, even if they do not have sales data.
Include combinations that exist only in SALES_DATA	This option selects combinations that have sales data, even if they do not have any associated promotions.

5. To exclude the combinations you do not want to see, click the checkboxes as needed.

See also

"Specifying Aggregation Levels" on page 52

Changing the Overall Scale or Unit of Measure

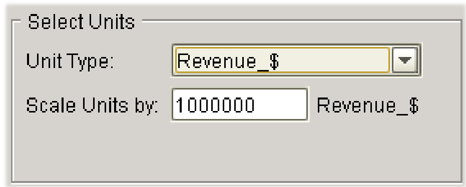
Any given content pane uses a single overall scaling factor and a single unit of measure. You can change either or both of these. When you make this change, the displayed values for most or all of the series are changed.

Note	This change affects only the series that are scaled. Not all series are scaled. For example, a series defined as a percentage is probably not scaled.

To change the overall scaling factor

1. Start the content pane editor; see "Creating or Editing Content Panes" on page 43.
2. Click **Aggregation**.

The Levels page includes a section where you specify the overall scale of the content pane, as well as its units of measure.



3. In the **Scale Units by** box, specify the factor by which all numbers in the content pane are to be divided (for display purposes).

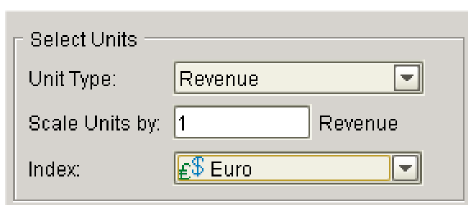
   For example, if you specify a factor of 1000, the displayed data will divided by 1000. So the number 96,000 will be displayed as 96. The vertical axis of the graph is updated to show the factor in parentheses.

To change the unit of measure

1. Start the content pane editor; see “Creating or Editing Content Panes” on page 43.
2. Click **Aggregation**.
3. In the **Unit Type** box, select the unit of measure to display in the worksheet results.

   For example, our items are bottles, and suppose that a case that contains six bottles. If you display the content pane with cases instead, the system will display the number of bottles divided by six.

4. If the **Index** box is displayed, choose an index from the dropdown list.



The **Index** menu lists all the time-dependent indexes and exchange rates that are associated with this unit. Each index or exchange rate is a time-varying factor that the content pane can use. When you select an index, the content pane will automatically multiply all monetary series by the factor for each date. For example, if you choose Consumer Price Index (CPI) as the index, the system will calculate all monetary quantities with relation to the CPI.

Note These indexes and exchange rates are generally imported from other systems. The set available to you depends upon your implementation.

See also

“Specifying Aggregation Levels” on page 52

Filtering the Content

You can filter any kind of content pane. You specify the scope of the content pane by filtering the data that it displays, so that it displays only selected members of specific aggregation levels. These aggregation levels do not have to be the same as the aggregation levels you display in the worksheet.

This filter is applied in addition to any filters associated with your user access.

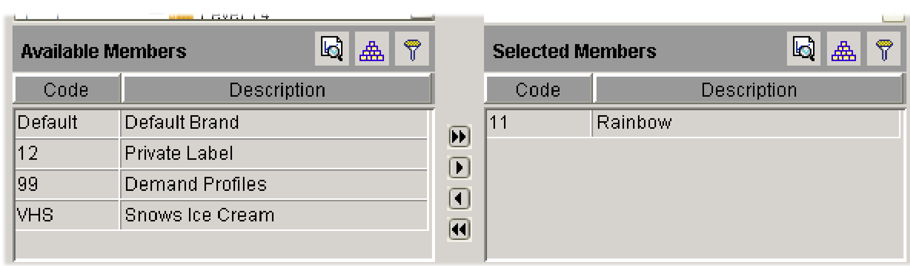
In contrast to an exception filter ("Applying Exception Filters" on page 58), this type of filter is static and behaves the same no matter how the data changes.

To filter data

1. Start the content pane editor; see "Creating or Editing Content Panes" on page 43.
2. Click **Filters**.

   The system displays the **Available Filter Levels** and **Selected Filter Levels** lists.
3. Find the aggregation level at which you want to filter data and move it from the **Available Filter Levels** list into the **Selected Filter Levels** list, using any of the techniques in "Working with Lists" on page 45.
4. In the **Available Members** list, find a member that you want to include in the content pane and move it into the **Selected Members** list, using any of the techniques in "Working with Lists" on page 45.

   At this stage, the content pane includes *only* data for this member. (Before you applied a filter at this level, the content pane could theoretically include any member of this level.)
5. Continue to move members from the **Available Members** list into the **Selected Members** list, until the latter list includes all the members you want.



To filter data further

Once you have applied a filter as described above, the content pane contains only those combinations that are associated with the members you specified. You can further filter the data in exactly the same way. Also see "Applying Exception Filters" on page 58.

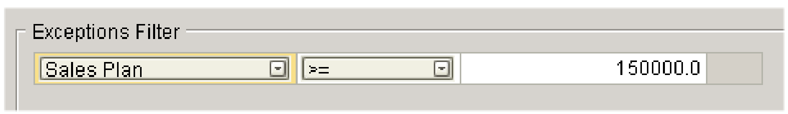
Managing the List of Members

Depending on how your system has been configured, it might contain a very large number of members. If so, you might want to sort or filter the list or search it. For information, see “Managing the Series Lists” on page 49.

Applying Exception Filters

You can apply an exception filter to any kind of content pane. If you do so, Demantra Spectrum checks the values of the data and displays only the combinations that meet the exception criteria. In contrast to an explicit filter (“Filtering the Content” on page 57), this type of filter is dynamic and can behave differently as the data changes.

Specifically, you define an exception condition that consists of a series, a comparison operator, and a value, for example:

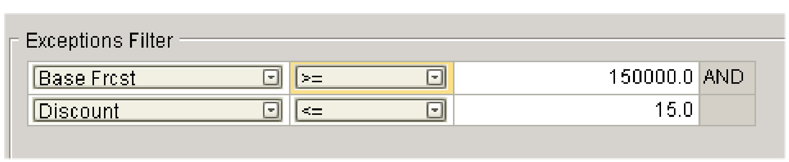


When you open the content pane, Demantra Spectrum checks each combination in the content pane. For each combination, if the condition is met for *any* time in the worksheet date range, Demantra Spectrum displays that combination. For example, the content pane shows combinations that have Sales Plan values greater than or equal to 150000, within the time range included in the worksheet.

If the condition is not met at any time for any of the worksheet combinations, Demantra Spectrum shows the worksheet as empty. That is, if all values in the Sales series are less than 15000 for all combinations, the worksheet comes up empty.

Note If the worksheet includes a promotion level or a promotion series, the behavior is slightly different. In this case, the Members Browser or dropdown list does initially show all combinations. When you click display a combination to display it, the worksheet then checks for exceptions.

You can apply multiple exceptions. When you do so, you can relate them to each other via logical AND or logical OR relationships. For example:



To apply an exception filter

1. Start the content pane editor; see “Creating or Editing Content Panes” on page 43.
2. Click **Exceptions**.

   The Exceptions Filter page appears.
3. Click **Add**.

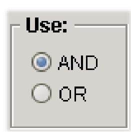
4. In the first box in the new row, select a series from the dropdown list.

Note Typically only some series are available for exceptions. If you do not see a series you need, contact your Demantra Spectrum administrator or your implementors.

5. In the second box, select an operator from the dropdown list.
6. In the third box, type or choose a value.

   - For a numeric series, type a number.
   - For a dropdown series, choose one of the allowed values of this series.
   - For a string-type series, type any string. You can use the percent character (%) as a wildcard.
   - For a date-type series, type a date or use the calendar control to choose a date.

7. (Optional) You can apply additional exceptions. Select the **AND** or the **OR** radio button to specify that the relationship between the exceptions.



To delete an exception filer

- Click the exception and then click **Delete**.

See also

"Filtering the Content" on page 57

Sharing Content Panes

In general, any content pane is one of the following:

- Private—available only to you
- Public—available to other users as well.

In either case, the original creator of a pane owns it and only that person can change it.

When you do share content panes, however, you should consider data security. Demantra Spectrum automatically prevents any user from seeing data for which he or she does not have permissions. If you build a content pane with data that other users do not have permissions to view, then those users will see an empty content pane. Similarly, if a user has partial permissions for the data, then the content pane will open with only those results that are permitted.

See also

"Configuring the Basics" on page 46

Deleting Content Panes

You can delete a content pane if you are its owner.

To delete a content pane

1. Display the content pane in Collaborator Workbench.

2. Click the Delete button.

   Demantra Spectrum prompts you to confirm the deletion.

3. Click **Yes** or **No**.

7 Logging in Remotely

By using Demantra Anywhere, you can access worksheets remotely and perform many of the same tasks described earlier in this manual. This chapter includes the following sections:

Notes

- Demantra Anywhere uses a separate license.
- Demantra Anywhere does not enable you to work offline. That is, you have access to the data only while you are actually logged on. For information on taking a worksheet offline, see the *Demand Planner Web User's Guide*, *Promotions Effectiveness User's Guide*, or *Demantra Settlement Management User's Guide*.

Introduction to Demantra Anywhere

In contrast to the other Demantra Spectrum products, Demantra Anywhere is a true thin Web client and does not require an applet. You can use it to access Demantra Spectrum functionality from remote machines, including handheld devices.

On the other hand, Demantra Anywhere provides less functionality than the other products. It does not show graphs, it does not display any subtabs of a worksheet, and it displays dropdown menus instead of a Members Browser. Other differences are listed below.

Data Availability in Demantra Anywhere

Demantra Anywhere treats data in the same way as other Demantra Spectrum products:

- Information in Demantra Spectrum is secured, and different users have permission to view different data. For details, see the *Demantra Spectrum Administrator's Guide*.
- The changes you make are not always visible immediately. See the *Demand Planner Web User's Guide* or the *Promotions Effectiveness User's Guide*.
- The same tips for session management apply to Demantra Anywhere.
  - Your session expires if you do not refresh the page periodically. Be sure to refresh the page so that you do not lose data. To do so, click **Data** > **Rerun**. If

you just mark check boxes or make selections, those actions do not reset the expiration counter.

- If you try to refresh the page after your session has expired, an error message informs you that the session has expired. Any work that was done since the last refresh will be lost. An automatic logoff is performed and a page opens with a link to return you to the login page.
- Depending on how your system was configured, new data might be available throughout the day. The data is not automatically loaded into your worksheet because that could disrupt your work. To get the latest data, click **Data** > **Rerun**.

Collaboration Features in Demantra Anywhere

- If you have a license for Collaborator Workbench, Demantra Anywhere provides all the options that Collaborator Workbench provides.
- If you do not have a license for Collaborator Workbench, Demantra Anywhere does not support any of the options of Collaborator Workbench. For example, it does not include **My Tasks** or **Who's Online**.

Worksheet and Content Features in Demantra Anywhere

The following table summarizes the features in Demantra Anywhere that relate to worksheets and content panes.

Feature	Availability in Demantra Anywhere
Worksheet elements	• If the worksheet includes subtabs, Demantra Anywhere does not display them. • Worksheet includes dropdown lists instead of a Members Browser, no matter how the worksheet is defined. • You use dropdown menus to access each view of a multi-view worksheet. • The graph is not shown. • Worksheet table cannot use crosstab layout (no levels on the axes).
Menu bar	Not available. Instead use the icons in the toolbar.
Right-click menus	Browser menu options only.
Opening and running worksheets	• Can open and close worksheets. • Can rerun currently open worksheet. • Cannot view worksheet definition. • Cannot take worksheets offline or bring back online.
Managing the screen	• If you open multiple worksheets, each is opened in a separate browser. • Cannot resize different worksheet areas (for example, the table). • Cannot resize table columns.

Feature	Availability in Demantra Anywhere
Members Browser content pane	Available as in Collaborator Workbench.
Editing data	• Can edit one cell at a time. • Can copy and paste data from cell to cell, one cell at a time. • Can reset manual changes. • Can save data. • Cannot undo. • Cannot change the automatic recalculation setting.
Printing	Can print the data that is currently displayed.
Exporting data	Not available.
Notes	• Can view notes. • Cannot edit or create notes. • Cannot alter note permissions.
Creating and redefining worksheets and content panes	Not available.
Running simulations	Not available.

Other Features in Demantra Anywhere

The other features in Demantra Anywhere behave the same as in Collaborator Workbench:

- Menus
- **Personalize** link (note that your choices here affect both your view of both Collaborator Workbench and Demantra Anywhere)

Logging Onto Demantra Anywhere

Demantra Anywhere requires a license, and you use a different login page depending on whether you also have a license for Collaborator Workbench. Also, the appearance of the Demantra Anywhere page depends on whether you have a license for Collaborator Workbench.

To log onto Demantra Anywhere

1. Open Microsoft Internet Explorer.
2. Enter the URL supplied by your system administrator.
    - If you have a license for Collaborator Workbench, this URL probably has the following format:

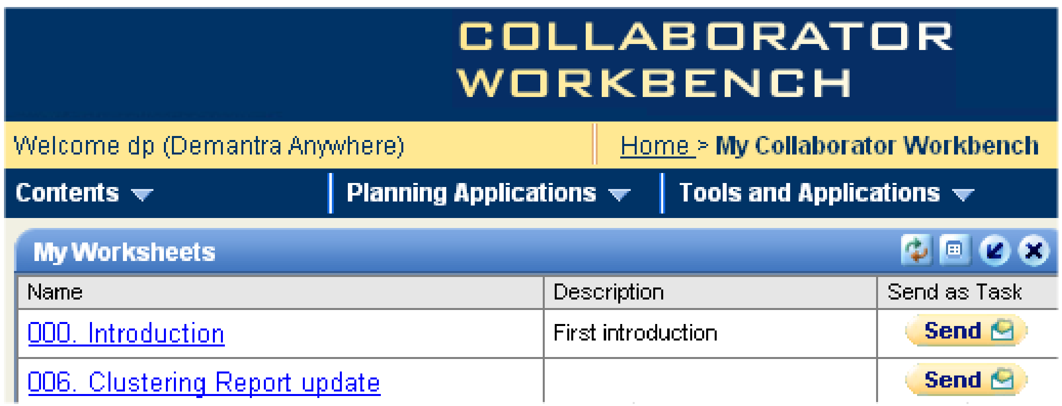
      http://*server name/virtual directory***/portal/remoteloginpage.jsp**
      For example:
      http://frodo/demantra/portal/remoteloginpage.jsp

- If you do *not* have a license for Collaborator Workbench, this URL probably has the following format instead:

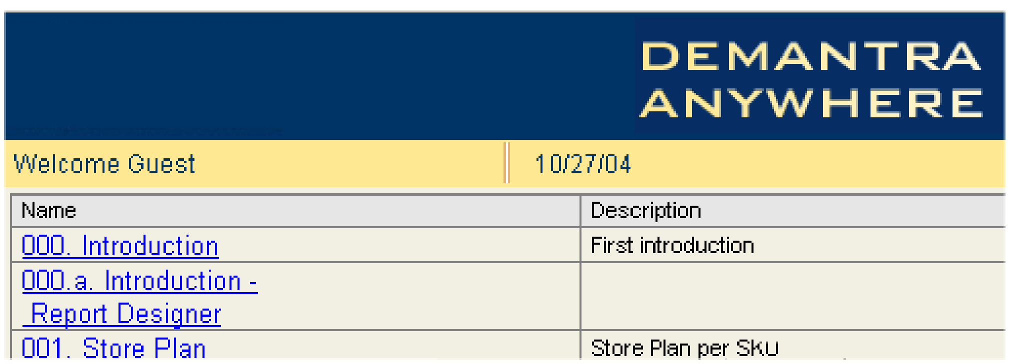
  http://*server name/virtual directory***/portal/anywhereLogin.jsp**
  For example:
  http://frodo/demantra/portal/anywhereLogin.jsp

3. In the login dialog box, enter your user name and password.
4. Click **Login**.

If you do have a license for Collaborator Workbench, Demantra Anywhere page looks very much like the Collaborator Workbench page. The words “Demantra Anywhere” appear next to your user name in the yellow bar to remind you that you have logged in remotely.



If you do not have a license for Collaborator Workbench, the Demantra Anywhere page looks like this:



See also

“A Brief Tour of Collaborator Workbench” on page 4
“Introduction to Demantra Anywhere” on page 61

Opening a Worksheet in Demantra Anywhere

To open a worksheet

- Click the name of the worksheet.

To run or rerun a worksheet

Depending on how Demantra Spectrum was configured, it may or may not automatically run the worksheet that you open.

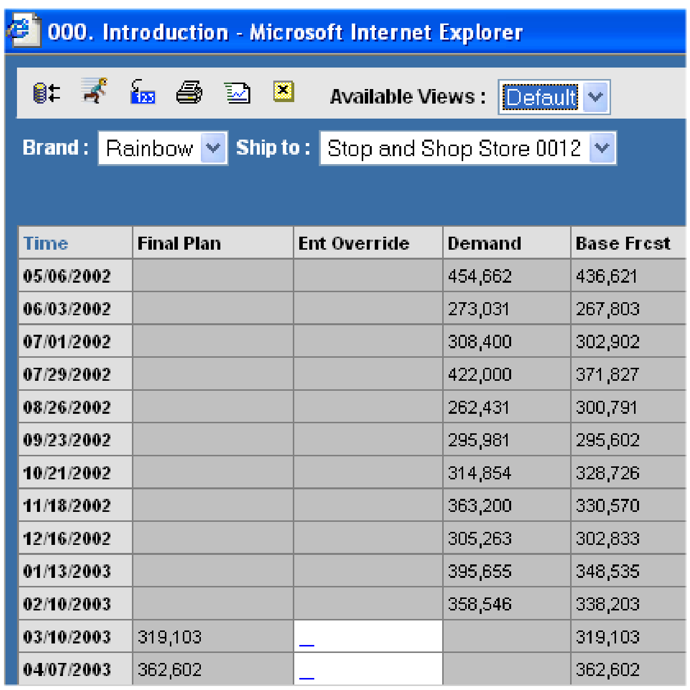
- Within the worksheet, click **Data** > **Rerun**.

See also

"Opening a Worksheet in Collaborator Workbench" on page 8

Using Worksheets in Demantra Anywhere

Within Demantra Anywhere, you can access any public worksheet created in Demantra Spectrum, but the worksheets have a simplified appearance, like this:



Time	Final Plan	Ent Override	Demand	Base Frcst
05/06/2002			454,662	436,621
06/03/2002			273,031	267,803
07/01/2002			308,400	302,902
07/29/2002			422,000	371,827
08/26/2002			262,431	300,791
09/23/2002			295,981	295,602
10/21/2002			314,854	328,726
11/18/2002			363,200	330,570
12/16/2002			305,263	302,833
01/13/2003			395,655	348,535
02/10/2003			358,546	338,203
03/10/2003	319,103			319,103
04/07/2003	362,602			362,602

To select a worksheet view

- Select the view from the **Available Views** dropdown list.

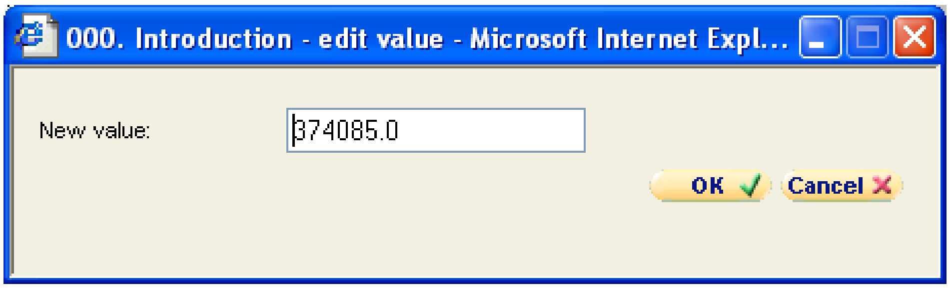
To select a different combination to display

- Select level members from the level dropdown lists (for example, Brand or Ship to).

To edit worksheet data

1. Click an editable cell.

   A small editing page appears.



2. Type in the new value and click **OK**.

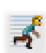
To save data

- Click the Update Data button.

To reset manual changes since the last time you saved data

- Click the Reset Manual Changes button.

To rerun the worksheet



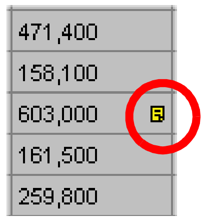
- Click the Rerun Worksheet button.

To print the currently displayed data

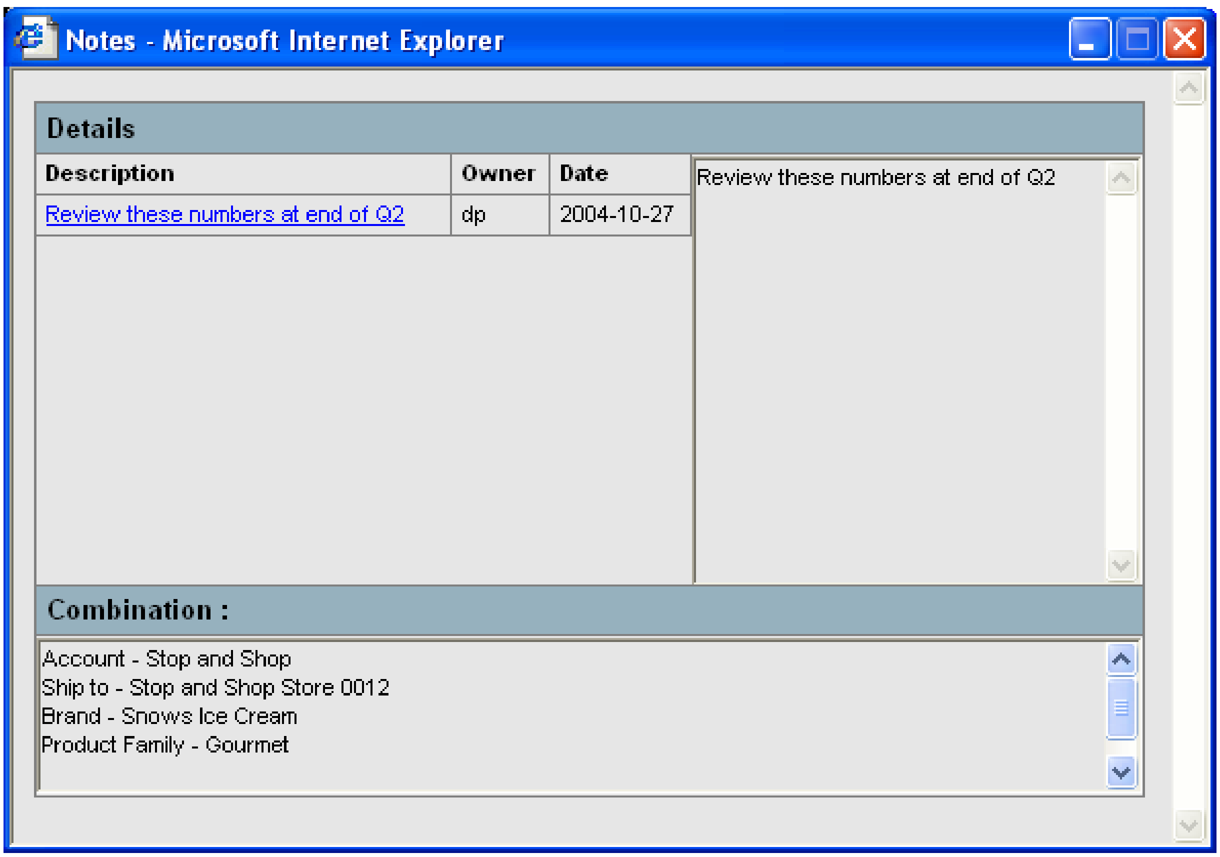
- Click the Print button.

To view a note

1. Click the note icon within the cell.



The **Note** page appears, displaying a list of all the notes. This list indicates the date of each note, as well as who entered it. The **Combination** field shows the item-location combinations to which the currently selected note belongs.



2. To see the note details, click **Description**.
3. To close the **Note** page, click the X in the upper right corner.

Glossary

4-4-5 calendar

A calendar that consists of financial quarters, in which each quarter consists of a “month” of exactly four weeks, followed by a “month” of exactly four weeks, followed by another “month” of exactly five weeks. In practice, 4-4-5 calendars vary slightly from company to company.

active combination

Item-location combination that is neither dead nor young; see *prediction status*.

advanced analytics

The process of specifying engine models and engine parameters for different *combinations* within the *forecast tree*, rather than using the global settings.

aggregation

The process of adding up or otherwise determining a useful summary of a set of related data. For example, you might add up the sales for all the products in a product group and arrive at an aggregated number for the entire product group. Aggregation does not always mean simple addition; you can aggregate data in other ways.

allocation

The general process of dividing a limited amount included in a data series on a product or location group level, to a product or location item level by using the proportions mix of group/items of a different data series.

To perform allocation, you use Allocation Management (within Demand Planner).

A/P department

Accounts payable department, the department that receives bills and is responsible for paying them.

approved trade

In general, this refers to *settlements* that have been matched to *promotions* and that have approved by a user with sufficient authority. See also *unapproved trade*.

A/R department

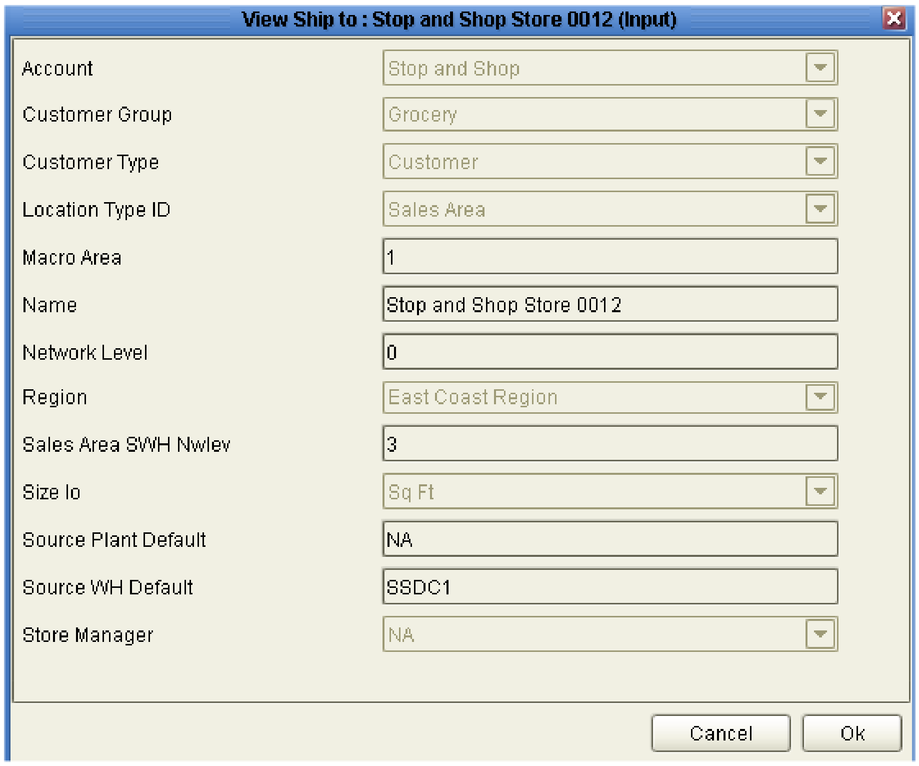
Accounts receivable department, the department that sends bills as needed and receives all payments.

attachment

A file, typically in JPEG or PDF format, that you include within a *note*, as supplemental information. You generally use attachments to provide *proof of performance*.

attribute

A descriptive property associated with the level (and stored internally in the table associated with the level). For example, a Ship To member might have the following attributes:



Apart from the **Name** attribute, the attributes shown in red are all parents of this member. They are shown in red because they are required.

You use attributes in several different ways:

- To provide extra information to describe members of the level. You can view and edit this information.
- To provide a further subdivision of the level data. To do this, you add an attribute to a level and select an option to create it as a child level. For example, suppose you create an attribute called ABC. If ABC can have the values A, B, or C, and if you create this attribute as a level, then the ABC level would have three members: A, B, and C. The member A, for example, would consist of all the data that had the A value for this attribute, within the parent level.
- For the purpose of exporting or importing data.
- To describe *promotions*. Promotion attributes are converted into *promotional causal factors*. Applies only to Promotions Effectiveness.

batch mode

A mode in which you can run the Analytical Engine. In this mode, the Analytical Engine uses the entire forecast tree. See also *simulation mode*.

base time buckets

The *time buckets* in which data is stored in Demantra Spectrum. Each base time bucket contains data corresponding to one *base time unit*. Users can view data aggregated into larger time buckets as well.

base time unit

The smallest possible *time unit* in your Demantra Spectrum implementation. The base time unit determines the *time resolution* of your system.

billback

Request for credit on invoice, due to a *promotion*.

broker

An outside party who negotiates promotional agreements between a manufacturer and the retailers. Applies to Settlement Management.

cannibalization

Reduced demand of an existing product caused by a new product introduction or by the increased demand of an existing product due to corporate strategies like promotions. Although cannibalization typically refers to negative effects only, sales interactions like switching of accounts, brands, products, or channel could be either positive or negative. Applies to Promotions Effectiveness.

causal factor

Additional information that can explain historical data so that you can improve forecast quality (for example: price, CPI, weather, and so on). Specifically, a causal factor is a time-varying quantity (such as a series) that affects demand. Demantra Spectrum provides the following general kinds of causal factors:

- A local causal factor depends on the time, location, and item being sold. For example, it can be a specific discount in a specific store.
- A global causal factor depends only on the time, for example, a holiday. See *global factor*.
- Promotional causal factors, which apply to different items, locations, and promotions. These causal factors are available only for Promotions Effectiveness.

You configure causal factors in the Business Modeler. Demantra Spectrum uses this information to better understand the sales history and make more accurate predictions.

chaining

The general process of associating historical patterns of existing series with other series found in a new product or location, with the goal of predicting for the new product or location. To perform chaining, you use Chaining

Management (within Demand Planner). You copy data from selected sources to the target combinations.

chargeback

A request sent to the customer for payment, typically when a *deduction* is denied.

check request

A request that a *CSD representative* sends to the company's *A/P department*.

claim

A kind of *settlement*, specifically a request from a customer for payment. In these cases, the customer has run the promotion and is requesting to be reimbursed, based on an agreement between you and the retailer. If you approve the claim, you request for your A/P department to send a check to this customer or to the broker, as applicable.

client expression

Calculates data at a given level, referring to other data at the same level. You use client expressions to calculate numbers that cannot be calculated by aggregation from lowest-level data.

A client expression takes precedence over a *server expression*.

Normally, you use a server expression to retrieve data for the series at the lowest aggregation level. For higher aggregation levels, Demantra Spectrum automatically aggregates the results of the server expression. In cases where that aggregation is not suitable, you use a client expression that explicitly uses the data associated with the higher aggregation level.

combination

The combination of an item member (from any hierarchy level) and a location member (from any hierarchy level). Each of the following is a combination:

- Chocolate cookies (at all stores)
- Chocolate cookies at the Fair Haven store
- All cookies at Better Stores, Inc.

The word *combination* can also refer to the data associated with that combination, for example, all sales of chocolate cookies at the Fair Haven store.

combination level

A level that contains time-*independent* data for combinations. Sometimes called *matrix level*.

combination series

More often called *matrix series*.

competitive item group (CI)

A set of items within an *influence range (IR)*. Typically an influence range includes two CIs: "us" and "them." For example, an influence range could consist of two CIs: one for Acme carbonated beverages ("us") and one for

Brand X and Brand Y carbonated beverages (“them”). See also *item group*. Applies only to Promotions Effectiveness.

competitive location group (CL)

A set of locations within an *influence range (IR)*. Each CL typically corresponds to a single competitive distribution channel. See also *location group*. Applies only to Promotions Effectiveness.

combination-selection list

Drop-down list at the top of a worksheet, equivalent to the *Members Browser*. A worksheet may have several of these, and you use them to specify which item-location combination the worksheet should display.

component

A subdivision of the Demantra Spectrum data. Each component includes the following items:

- One or more series of data, organized into specific levels.
- Units of measure.
- Optional indexes and exchange rates.
- An owner, who can add additional users.

content pane, content

Pane within Collaborator Workbench that displays a graphical view of data associated with a worksheet, to provide you with current, at-a-glance information that meets your needs. You can display content in many formats such as the following:

- Members Browser, which is a collapsible tree hierarchy of data levels
- Tabular format
- Chart formats including line, bar, and pie charts
- Calendar format

crosstab

A worksheet that has been configured with levels on the x-axis and/or y-axis.

CSD representative

A member of the customer service department. The primary users of Settlement Management are CSD representatives.

dead combination

Combination for which sales are not recent enough to be used for prediction. See also *prediction status*.

deduction

A kind of *settlement*, specifically a short payment on an invoice. In these cases, the customer has run the promotion and has made a short payment on an invoice. By permitting this short payment, you are reimbursing the customer for running the promotion.

dimension

Perspective from which a large volume of complex and interrelated data can be viewed and analyzed. Each dimension organizes data in one or more hierarchies of *levels*, allowing you to view the data in different ways. Your Demantra Spectrum application can have any number of dimensions, which you define in the Business Modeler. See also *level hierarchy*.

engine profile

A set of engine parameters with specific values and a profile name. For use only with the Promotions Effectiveness engine.

exception

If you attach an exception to a worksheet, Demantra Spectrum checks the values of the worksheet data and displays only the combinations that meet the exception criteria.

Specifically, you define an exception condition that consists of a series, a comparison operator (such as equals or greater than), and a value, for example:

Sales > 150000

When you open the worksheet, Demantra Spectrum checks each combination in the worksheet. For each combination, if the condition is met for *any* time in the worksheet date range, Demantra Spectrum displays that combination. For example, the worksheet shows combinations that have Sales values greater than 150000, within the time range included in the worksheet.

If the condition is not met at any time for any of the worksheet combinations, Demantra Spectrum shows the worksheet as empty. That is, if all values in the Sales series are less than or equal to 15000, the worksheet comes up empty.

You can attach multiple exceptions to a worksheet. When you do so, you can relate them to each other via logical AND or logical OR relationships.

fictive

Placeholder. For example, when you first create a member using Member Management, that member is not yet associated with any sales data and is therefore a fictive member.

filtering

The process of limiting the scope of data. Demantra Spectrum provides two general types of filters, each of which allows only certain data to be displayed or otherwise used.

The more common filters are combination filters. For this type of filter, you specify the following:

- An aggregation level. You can filter data at any level in any dimension.
- Members of that aggregation level that are allowed through the filter; other members are not included.

The net result is that a filter allows Demantra Spectrum to display only certain item-location combinations.

In a few places, Demantra Spectrum provides a different type of filter, a value-specific filter that allows only data that contains certain values.

forecast

Predictions about future sales of items at various locations, as a function of time. The forecast is based upon the demand, which in turn is based upon the historical data. The length of time that the forecast spans is called the *forecast horizon*.

The Analytical Engine creates the forecast, either as the result of the batch forecast, or when a user runs and approves a simulation.

forecast model

Mathematical model used to predict forecast. Demantra Spectrum provides about a dozen forecast models that are in common industry use. To create its forecast, the Analytical Engine tests each model, sees how well it fits the historical data, and uses a weighted combination of the results from all the models.

forecast node

Node within the forecast tree.

forecast tree

A single hierarchy of forecast data, the forecast tree is made up of item-location combinations at different aggregate levels. Each node in this tree represents a time-based series that is subject to forecast. The forecast tree does not need to contain all possible combinations, only those that are relevant to the forecasting process.

general attribute

See *attribute*.

general level

An aggregation level that stores *time-dependent* data for a *combination*. For example, a promotion is generally associated with one or more items at one or more locations, and is associated with specific dates. Demantra Spectrum stores the data for this promotion as a general level.

global factor

A causal factor that depends only on the date of the sale. A global factor affects all items and locations in the system. For example, global oil prices have an impact on the sales of automobiles. The effect is widespread but changes with time. The effect occurs at all locations where the automobile is sold, and for all models being sold.

Another possible global factor is a holiday, if all locations in your solution follow the same holidays.

group

Set of users who can work together via Collaborator Workbench. A user can belong to multiple groups.

Membership in a group also controls access to the Workflow Editor; see *Demantra Spectrum Administrator's Guide*.

historical data

In general, this is the record of sales of different items at all locations, for months or years in the past. For each sale, you must know the location of the sale, the product code, price, and quantity. You also typically know information about causal factors (such as holidays and promotions) that may have affected the sales volume. Demantra Spectrum also uses information about returns, inventory levels, and orders.

index

A financial measure used to normalize prices over time. An example is the Consumer Price Index (CPI).

influence group (IG)

A set of item-location combinations in which all items belong to the same *item group* and all locations belong to the same *location group*. Within a given *influence groups*, the influence groups mutually interact. By identifying the influence groups, you determine the coarseness or generalization of causality. Applies only to Promotions Effectiveness.

influence range (IR)

Level within the forecast tree that controls how far the Analytical Engine looks for influence when a promotion is run. The influence ranges control how far the Analytical Engine looks for influence when a promotion is run. This determines the breadth of the causality. An influence range consists of multiple *influence groups*. Applies only to Promotions Effectiveness.

item

One of the dimensions by which you view data. Other typical dimensions are location and time. Each dimension consists of one or more hierarchies of data, allowing you to view data organized in different ways. For example, if you are forecasting demand for muffins, the item dimension could contain a product group hierarchy and a flavor hierarchy.

item group

A set of items within a *competitive item group (CI)*. For example, within the Acme CI, the item group I1 might consist of orange-flavored soft drinks. Another item group, I2, might consist of colas. Applies only to Promotions Effectiveness.

level

An aggregation of data. For example, the Color level might consist of the sales data aggregated by the color of the items. Each level consists of members. The Color level would have one member for each color.

Levels allow you to view the data in different ways. Demantra Spectrum supports the following types of levels:

Item levels organize data in ways that reflect product properties such as product family, color, style, and so on. Each member of an item level represents time-dependent data aggregated according to some attribute of the items being sold.

Location levels group and aggregate data according to characteristics of the locations where you sell. For example, location levels could describe geography or types of stores.

Combination (or matrix) levels group and aggregate data according to characteristics of the item-location combinations. These are less common than item and location levels.

Time levels group and aggregate data by sales date. Normally you use a time level in place of the time axis.

Promotion levels group and aggregate data by sales promotions. Depending on how your system is implemented, you may have a hierarchy of promotional levels (to organize the promotions), and the higher levels might use different icons.

Unlike other kinds of levels, promotion levels can be displayed within a Gantt chart. Promotion levels are available only with Promotions Effectiveness.

Settlement levels, which are used only by Settlement Management. In general, a settlement is an outstanding sum of money that needs to be resolved, related to a promotion. If you use a settlement level in a worksheet, you cannot use levels from any other hierarchy in that worksheet.

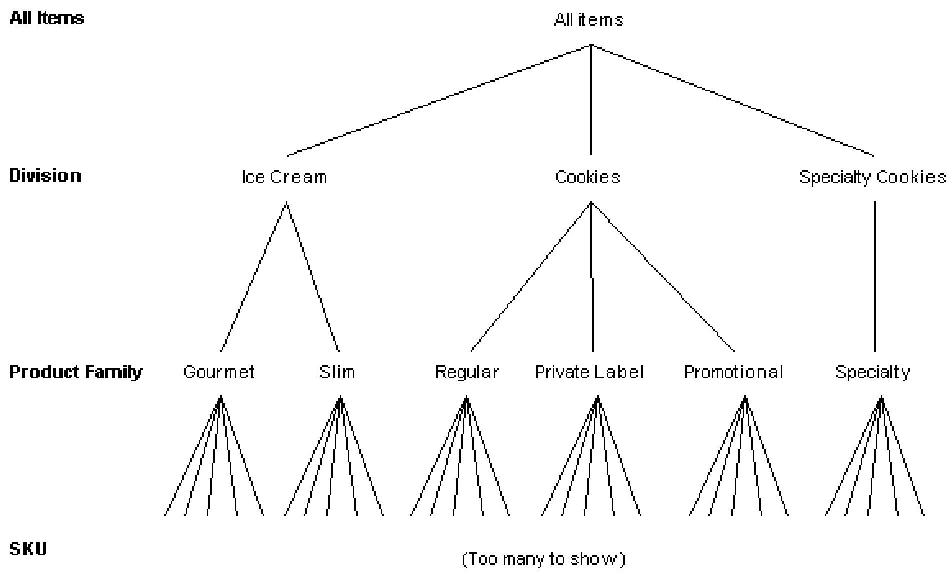
Check request levels, which are used only by Settlement Management. A check request is an instruction to send a check to a customer or designated third party. Check requests are exported to the accounting systems that actually perform them.

Item and location levels are the most common.

Levels are organized into *hierarchies*, and each level can have *attributes*.

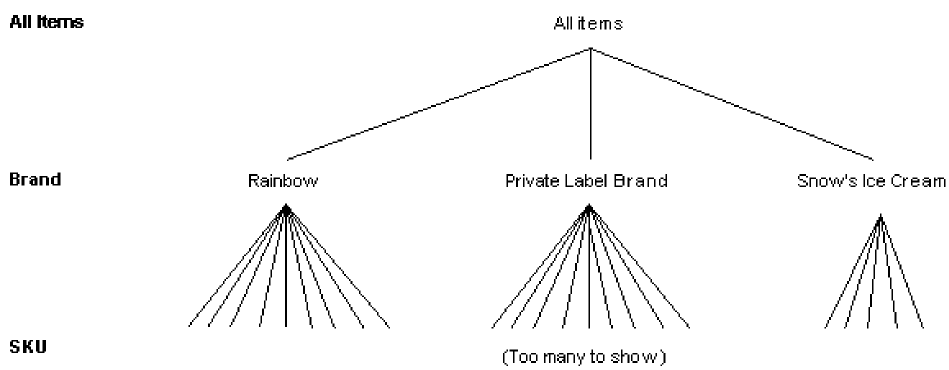
level hierarchy

Each level can belong within any number of independent hierarchies, each of which represents a different way of aggregating data. For example, the SKUs could be organized into product families, which in turn could be organized into divisions as follows, as follows:



In this example, Division, Product Family, and SKU are all levels in Demantra Spectrum.

The SKUs could also be organized into brands as follows:



Note that this hierarchy is independent of the product family hierarchy. That is, there is not necessarily any relationship between brands and product families. Nor is there any relationship between brands and divisions.

Given these relationships, a member can have parents. For example, consider the SKU member Rainbow LF Chocolate Chip. This SKU might have the following parents:

- Regular (parent of this SKU within the product family level)
- Rainbow (parent of this SKU within the brand level)

level series

A series that is associated with a specific level. Each data point in the series corresponds to a given member of that level. Data for this series is stored in the table associated with the level.

live combination

Item-location combination that is neither dead nor young; see *prediction status*.

location

A dimension by which you view data. Other typical dimensions are item and time. Each dimension consists of one or more hierarchies of data. For example, the location dimension could be broken down into country and then into states and towns.

location group

A set of locations within a *competitive location group (CL)*. Applies only to Promotions Effectiveness.

matrix level

See *combination level*.

matrix series

A series that consists of time-independent data for each item-location combination. This data is stored in **mdp_matrix**.

member

An element of a *level*. Each level contains one or more members. For example, at the city level, members may include Paris and London.

Each member corresponds to a set of sales data. Each member has properties that apply to the sales data at that level, such as unit, description, and an identifying code.

There are several types of member

Real	Member that was created by import and that has sales data. Most members are real.
New	Member that was created by import but that does not yet have sales data. When sales data is loaded for this member, it will become real.
User-defined or *fictive*	Member that you have created via one of the following: • Members Browser in a Web-based worksheet. • Member Management in Demand Planner and Demand Replenisher. When this member is loaded via import, it will become new or real, depending on whether it has sales data.

member management

The process of creating, editing, and deleting level *members*.

Members Browser

A collapsible tree hierarchy of item and location levels. Within a Promotions Effectiveness worksheet, you use the Members Browser to specify which item-location combination the worksheet should display.

method

An action that can be performed for a specific member within a worksheet. Methods appear as options within the right-click menu. A method is associated with a specific level and may be available only within a specific worksheet or within all worksheets.

model

Mathematical model that the Analytical Engine uses when creating a forecast.

note

A comment that you attach to data in a worksheet. A note is generally associated with specific items and locations, on one or more dates. A note can include an *attachment*.

off-invoice settlement

A kind of *settlement* that represents the case where the customer was billed a lower amount (that is, “off invoice”) for the products, as compensation for running the promotion.

outlier

An atypical observation, generally infrequent; a data point that does not appear to follow the characteristic distribution of the rest of the data. Outliers may reflect genuine properties of the underlying phenomenon (variable), or may be caused by measurement errors or other anomalies that should not be modeled.

Some of the Demantra Spectrum forecast models automatically identify and exclude outliers, and Demantra Spectrum indicates when that occurs. You can manually identify outliers as well.

POS data

Point-of-sale data.

prediction status

When generating forecasts, the engine considers the prediction status of each item-location combination. Prediction status is one of the following:

Status	Description
Young	Sales for this combination are too new to be used for prediction.
Dead	Sales for this combination are not recent enough to be used for prediction.
Live	Neither young nor dead. Also called *active*.
Create Zero Forecast	A user has specified this prediction status manually for this item-location combination, and this status means that this combination should have a forecast consisting of zero values.

The Analytical Engine ignores any young or dead combinations.

program group

A collection of menu items, typically related to each other in some way. You create program groups so that you can easily control access to all the menu items in the group. Demantra Spectrum provides several predefined program groups, for convenience.

proof of performance

Also known as POP. A document that shows that the retailer did run the promotion as required by agreement. POP is usually required before you can approve a settlement. You generally use an *attachment* to provide proof of performance.

promotion

A marketing event associated with specific items at specific locations during a specific time. You generally run promotions in order to increase demand.

promotion series

A series that consists of data for each promotion at each item-location combination, at each time bucket.

promotional causal factor

A set of time-varying data associated with specific items at specific locations during a specific time. Applies only to Promotions Effectiveness.

proport

Mechanism that Demantra Spectrum uses for splitting aggregated data across the corresponding lowest-level members. Demantra Spectrum splits data on many occasions, including the following:

- When the Analytical Engine generates a forecast at an aggregated level
- When data is imported at an aggregated level
- When users edit aggregated data
- When users perform chaining at an aggregated level.

proportions

Split proportions used by the *proport* mechanism.

sales series

A series that consists of time-dependent data for each item-location combination. That is, each data point in the series corresponds to a given item-location combination at a given point in time. This type of series is the most common type by far.

seasonality

If historical data has a regular pattern of observations above and below a trend, the data is said to be seasonal. Seasonality is generally observed in data compiled on a less than annual basis (for example, quarterly or monthly).

series

Usually, a time-dependent set of data. For example, sales data and the forecast are both series. Although most series are time-dependent, Demantra Spectrum supports other types of special-purpose series: *matrix series* and *level series*.

A series can be defined by a *server expression*, a *client expression*, or both. In general, the definition of a series describes how data for that series should be calculated at any aggregation level.

- Some series are calculated by aggregated data from the lowest level stored in the database. Data can be aggregated in various ways, for example by totalling it, or by taking the maximum or the minimum value. To see data changes in this kind of series, you must rerun the worksheet.
- Some series are calculated at the level of the worksheet, using data currently available at the worksheet level. Data changes are available immediately.

Also, when you edit data for a series, Demantra Spectrum calculates the values for the lowest level and writes that to the database. This means that worksheets run more quickly at lower levels than at higher levels.

server expression

The SQL expression that calculates the series data at any level by aggregating the associated lowest-level data. A very common server expression has the following form:

sum (*table_name.update_column_name***)**

Here *table_name.update_column_name* is the table and column that stores data for this series. The server expression often includes the unit of measure in which results are expressed.

A *client expression* takes precedence over a server expression.

settlement

An agreement between a manufacturer and a retailer in which the retailer runs a specified promotion (to boost sales of a specific product or products) and the manufacturer agrees to compensate the retailer for this action. In some cases, this agreement is negotiated by a third party, namely, a broker.

See *claim*, *deduction*, and *off-invoice settlement*.

simulation

A ‘what if’ scenario in which a user may manipulate measure data (such as History) and examine the way in which the changes affect related measure data (such as Forecasts).

simulation mode

A mode in which you can run the Analytical Engine. In this mode, you perform evaluate a scenario, to see what might happen in a given situation. In contrast to batch mode, you use only a small part of the forecast tree and a comparatively small set of data series.

splitting

In general, *splitting* refers to the general process of dividing an aggregated amount into appropriate parts. See *proport*.

switching effect

Generic term for the effect that a sale for a given item-location combination can have on sales for another item-location combination. Applies only to Promotions Effectiveness.

task

A unit of work shown in the **My Tasks** module. A task generally consists of a request for a specific user or set of users to review a given *worksheet*; the task has a subject line, a description, and a message; it can include a Web link, as well as an attached file. Each task has a status and sometimes a timeout period. After you address the task, you should mark it as done so that the Workflow Engine can continue with the next steps in the workflow.

(The workflow can also send email to a task recipient, via the external email system, but that email has no direct effect on the workflow.)

Depending on how Collaborator Workbench has been configured, users may also be able to create tasks and send them to other users.

time

A dimension by which you view data. Other typical dimensions are item and location.

time bucket

Depending on context, this phrase refers to any of the following:

- The *base time buckets*.
- A specific period of time corresponding to a time unit (the week of 1/3/05).
- The data associated with that period of time (the data associated with the week of 1/3/05). If you consider a set of series as a spreadsheet, with time as the horizontal axis, then a time bucket is a vertical slice of the data.
- A *time unit* (a week).

time level

A level that aggregates data across time. Depending on your system, time levels are configured to enable you to analyze data by the specific month of the year, day of the week, and so on.

time resolution

In general, time resolution specifies the amount of visible detail for time-dependent data. Specifically, it refers the time unit by which this data is grouped, for example, by months or weeks. See also *time unit*.

time unit

A unit of time in Demantra Spectrum, such as day, week, month, and others, including the months of a *4-4-5 calendar*.

The *base time unit (or minimum time unit)* is the smallest length of time that your data model represents. This can be either a day, a week, or a month, by default; smaller buckets are possible but require custom work. The size of the base time unit determines the *maximum possible time resolution* of your model.

trend

The long-term behavior of data, over time.

unapproved trade

In general, this refers to *settlements* that have been matched to *promotions* and that have not yet approved. See also *approved trade*.

unresolved trade

In general, this refers to *settlements* that are either new or in progress.

waterfall chart

A chart or table that displays both the current version and past versions of the same data.

workflow

An automated sequence of steps, some automatic and some that require user input. A typical workflow sends tasks to users (to appear in **My Tasks** module) in response to conditions within the demand chain process.

worksheet

A set of data retrieved from the Demantra Spectrum database. In a worksheet, you specify information such as following:

- At least one series to retrieve from the database
- The levels of aggregation to view in the worksheet
- Optional filtering to set the scope of the worksheet

A worksheet can be public (shared with other Demantra Spectrum users) or private. Only the owner of a worksheet can edit it.

A worksheet is also known as a *query.*

x-axis

The horizontal axis of a worksheet graph and correspondingly, the vertical axis of a worksheet table.

y-axis

The vertical axis of a worksheet graph and correspondingly, the horizontal axis of a worksheet table.

young combination

Item-location combination for which sales are too new to be used for prediction. See also *prediction status*.

zero history

Historical data consist of zero sales. You usually create zero history for combinations you create via Member Management, so that there are placeholder records that you can edit.

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