DEMANTRA SPECTRUM RELEASE NOTES

Version 7.0.2

CREATE DEMAND. MANAGE DEMAND. FULFILL DEMAND.

Demantra Spectrum Release Notes
Version 7.0.2
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Demantra Spectrum Release Notes

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Preface

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About This Manual

This manual is intended for use by system implementors, while you implement a Demantra Spectrum solution. For details on this manual, see the following section.

Overview of the Demantra Spectrum Documentation

The Demantra Spectrum documentation is divided into the following categories.

For Use During Installation

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 (used for demos)

For Use During Implementation

Manual	Contents
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.
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

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 levels • Configuring the menus and links in Collaborator Workbench • Upgrading the Demantra Spectrum license • Troubleshooting appendix

For End Users

The following manuals apply to Demantra Web-based products:

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

The following manuals apply to Demantra desktop products:

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

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*.
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 Introduction to Demantra Spectrum

The Demantra Spectrum Application Platform provides a flexible data model on which the comprehensive business logic of our applications resides. This chapter briefly introduces the Demantra Spectrum applications and platform. It is organized into the following sections:

Demantra Spectrum Applications.....1
Basic Products in the Platform.....2
Configuration Tools in the Platform.....5

For further details, see the manual Demantra Spectrum Concepts.

Demantra Spectrum Applications

The Demantra Spectrum application provide out-of-the-box application functionality in three key areas:

- Trade Promotion Management
- Promotion Modeling & Optimization
- Real Time Sales & Operation Planning

These standard out-of-the-box applications can be further tailored to reflect a customer's specific business logic in these business areas.

This release, 7.0.2, includes a combined version of the Trade Promotion Management and Promotion Modeling & Optimization applications (referred to as TPMO).

Demantra's Trade Promotion Management & Promotion Modeling & Optimization (PMO) applications are a powerful combination of a financial application to manage retailer trade funds coupled with a comprehensive promotion analysis tool specifically targeted at manufacturers for the purpose of better planning trade funds usage. The application takes in sales, point of sale (POS), and syndicated data to provide advanced pre and post promotion analysis:

- Historical event evaluation, including detailed analysis of lift components, taking into account both direct and indirect effects
- Base volume forecast by item over time based on past history
- Incremental volume forecast based on user-defined promotional variables and causals (i.e. product, time, price, vehicle, buydown, etc.)

- Detailed fund analysis, including quota versus actuals
- Event optimization taking into consideration a variety of constraints (time, budget, spend, # of events, etc.)

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

See the *TPMO Demo Script* and the *TPMO User's Guide*. The *TPMO Demo Script* contains more details and refers to the sample data set; the *TPMO User's Guide* describes only the base TPMO functionality.

Basic Products in the Platform

The Demantra Spectrum platform provides the following separately licensed Web-based product.

Demantra Settlement Management, New in 7.0

Settlement Management provides a Web-based user interface for viewing the unmatched deductions off invoice and provides means for resolving deductions to promotional activities.

See the *Demantra Settlement Management User's Guide*.

Promotion Optimization

The Promotion Optimization module lets you optimize single promotions and entire promotional calendars. Promotion Optimization is an add-on that works with Promotions Effectiveness. If a user has a license to Promotion Optimization, additional options are available in the right-click menu in a worksheet.

These right-click menu options are configurable. You can specify the optimization goals, the parameters used, as well as the levels at which these options are available. See the *Demantra Spectrum Consultant's Guide*.

Also see the *Promotions Effectiveness User's Guide.*

Promotions Effectiveness

Promotions Effectiveness is a Web-based product that helps you evaluate the effects of marketing promotions. It includes an enhanced data structure and advanced analytics capability to support the planning, optimization and simulation of promotions. Demantra Spectrum gives both manufacturers and retailers the ability to

accurately measure the effectiveness of their promotions. Sales and marketing organizations can measure the impact and ROI of their promotions. Sales and marketing professionals can plan promotions and analyze and optimize their effectiveness.

Demantra Spectrum can distinguish between real lift versus apparent lift caused by consumer pantry loading, product cannibalization, and other factors. Demantra Spectrum's advanced analytics enable organizations to understand the real impact of promotions so they can focus on those that yield the greatest return on investment. The forecast evaluates the effect of promotions and provides an analysis of the interaction between different products and locations.

See the *Promotions Effectiveness User's Guide*.

Demand Planner Web

Demand Planner Web is a configurable Web-based product to help your organization perform demand planning. The system can support multiple demand planners in an organization, and possibly outside the company.

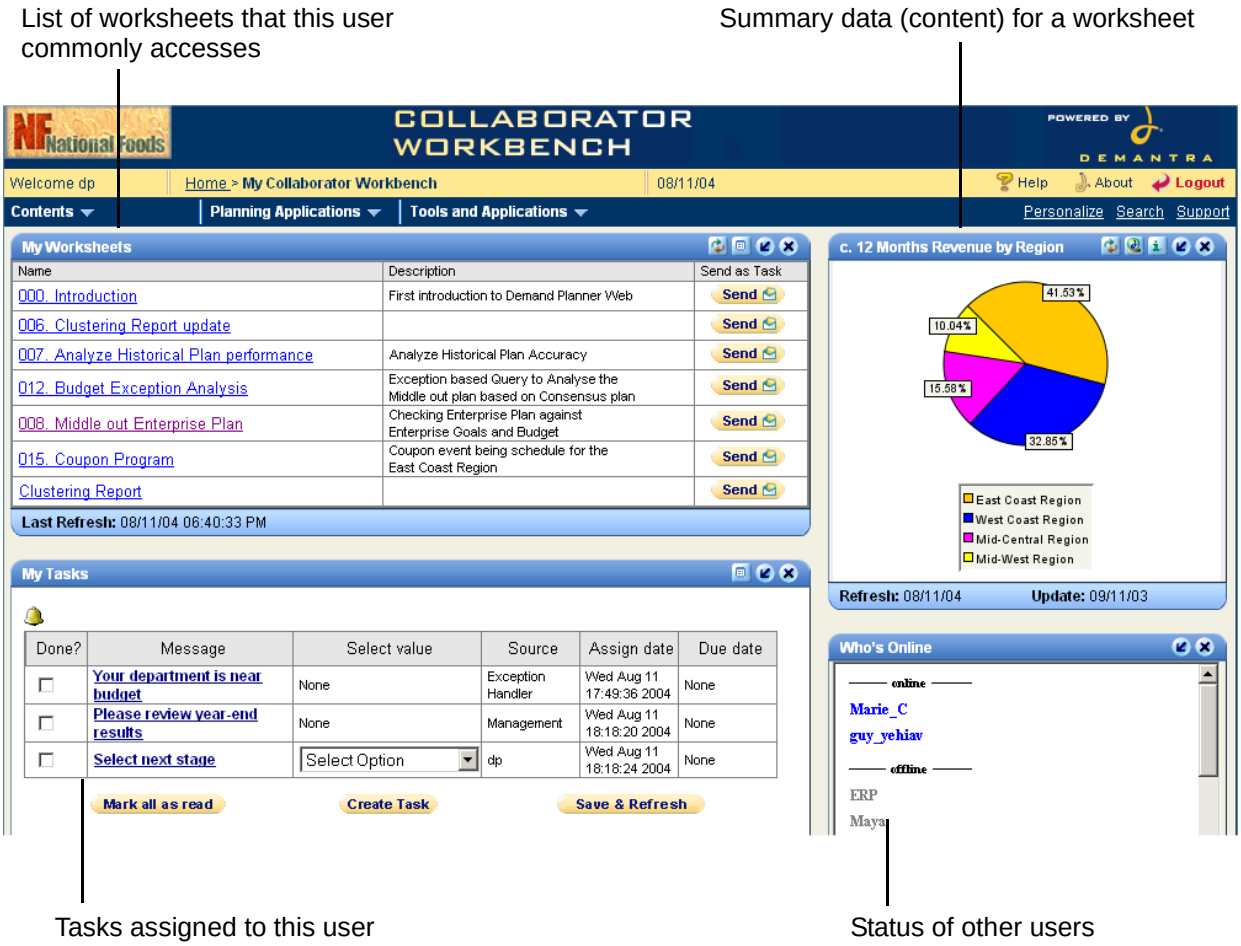
This product provides real-time access to your sales data, organized into hierarchies that reflect the needs of your organization. An underlying spreadsheet provides a set of calculated (and input) values that you can use at any level of the hierarchy; these values include the demand, discounts, various overrides, information about causal factors, and different types of forecasts.

See the *Demand Planner Web User's Guide*.

Collaborator Workbench

Collaborator Workbench is a Web-based collaborative tool that works with Demand Planner Web, Promotions Effectiveness, and Settlement Management. Collaborator Workbench uses workflows configured for your enterprise. A workflow automatically sends worksheets to you and other users at the appropriate times, can react automatically to predefined conditions, and automates tasks such as data import. All data transfer is secure. An additional license is required for the workflow module.

Depending on how Collaborator Workbench is configured, it can include some or all of the elements shown in the following figure. Note that you can configure all these elements for your own needs.



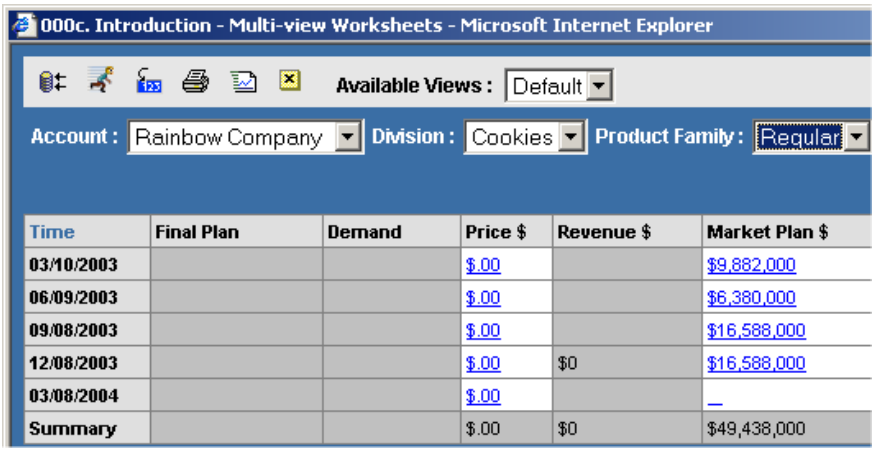
When you log in, you can see the worksheets to which you have access, and you can send worksheets and messages to other users. The net result is that all users participate in performing joint planning, within a single process, eliminating confusion and rework.

See the *Collaborator Workbench User's Guide*.

Demantra Anywhere

Demantra Anywhere is a very thin HTML client that you can use to access worksheets and collaborative functionality, depending on the license. In contrast to the other Web-based applications, Demantra Anywhere does not require an applet.

By using Demantra Anywhere, you can access a thin client version of any public worksheet created in Demantra Spectrum. The worksheets have a simplified appearance, like this:



Time	Final Plan	Demand	Price $	Revenue $	Market Plan $
03/10/2003			$.00		$9,882,000
06/09/2003			$.00		$6,380,000
09/08/2003			$.00		$16,588,000
12/08/2003			$.00	$0	$16,588,000
03/08/2004			$.00		
Summary			$.00	$0	$49,438,000

See the *Collaborator Workbench User's Guide*.

Demand Planner

Demand Planner is the older, desktop-based version of Demand Planner Web. See the *Demand Planner User's Guide*.

Demand Replenisher

Demand Replenisher is a desktop product that helps you perform demand replenishment. It performs basic safety stock calculations and generates a replenishment plan. See the *Demand Replenisher User's Guide*.

Configuration Tools in the Platform

The Demantra Spectrum platform includes the following configuration tools

Tool	Purpose and supported tasks
Business Application Language and the BAL Explorer	• New in 7.0. See "BAL Explorer (New in 7.0)" on page 7.
Engine Administrator	• Run the Analytical Engine
Business Logic Engine	• Evaluate client expressions in the background • Create a process to define safety stock levels, based on your input data

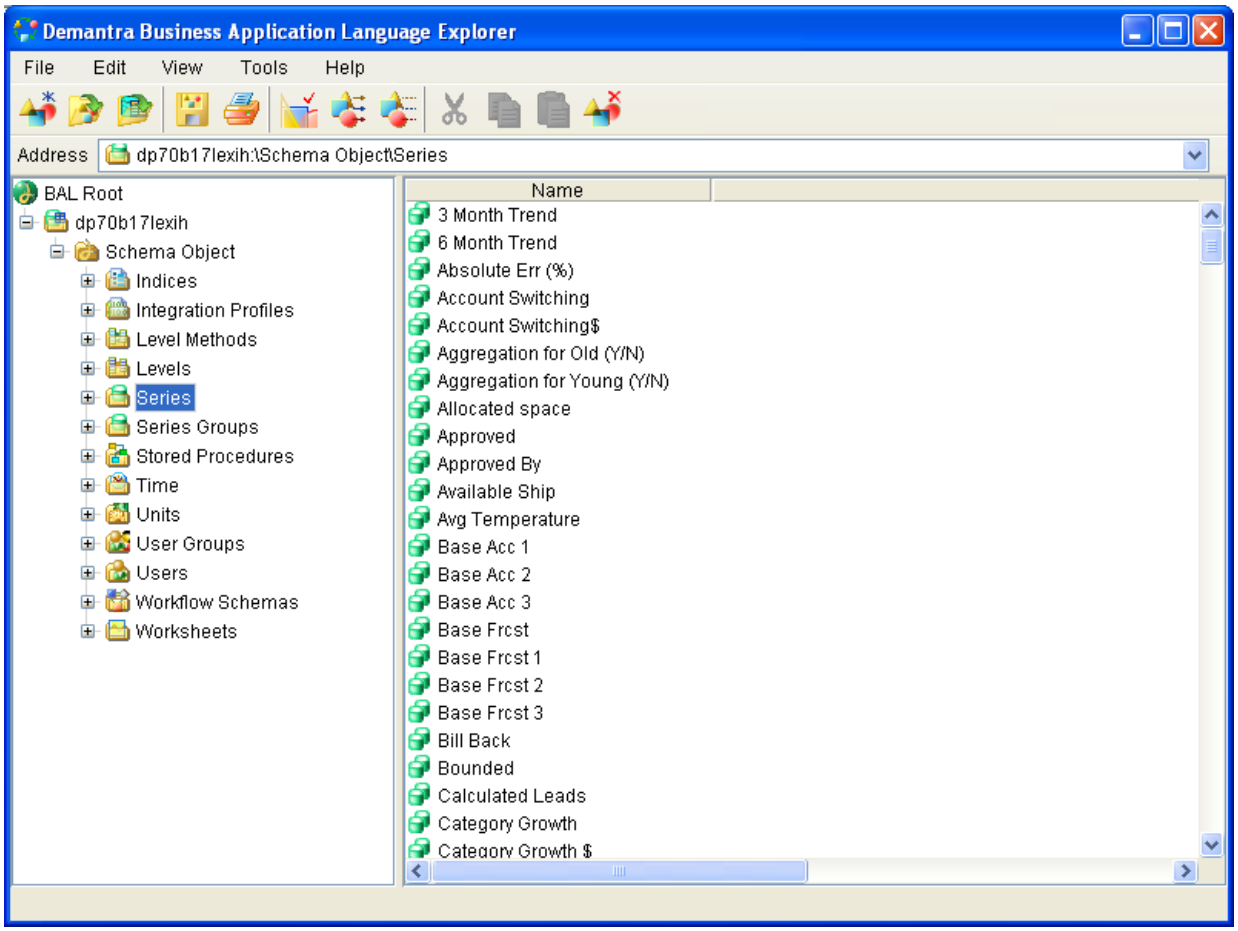
*These tools are Web-based. The others are all desktop-based. Collaborator Workbench and Workflow Manager are also licensed separately from the other tools listed here.

Tool	Purpose and supported tasks
Business Modeler	• Set up the Demantra Spectrum data model • Configure levels • Configure units of measure, financial indexes, and conversion rates for use in series and worksheets • Configure the series and groups of series • Set up integration • Manage the worksheets (queries) • Perform simple edits to the database • Define methods that the user can execute from within worksheets • Use the Constraint Profit Optimization Wizard • Set up causal factors • Set up the forecast tree • Tune the Analytical Engine • Tune the proport mechanism • Create components, or subdivisions of Demantra Spectrum data • Maintain users and groups of users for each component
Collaborator Workbench Administrator*	• Configure menu security throughout the Web-based products. • Configure menus and default content panes in Collaborator Workbench
Workflow Manager*	• Define, start, and manage automated workflows
Scheduler	• Schedule database tasks to run automatically in the background. You can also run database tasks from within a workflow.

*These tools are Web-based. The others are all desktop-based. Collaborator Workbench and Workflow Manager are also licensed separately from the other tools listed here.

BAL Explorer (New in 7.0)

Demantra's Business Application Language (BAL) encapsulates the formal definitions of a Demantra Spectrum solution so that those definitions can be shared readily from one solution to another. You use the BAL Explorer to browse and share these definitions.



The BAL Explorer is designed to enable you to do the following actions:

- Browse the contents of an existing Demantra Spectrum schema *from any release*
- Copy key elements from one schema to another or into a file that can be shared via email
- Compare two Demantra Spectrum schemas.

Note BAL Explorer is packaged and installed separately in this release.

2 New and Changed Features (Since 6.2.4)

For your reference, this chapter describes new and changed features since *6.2.4, up through release 7.0.2.*

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Enhancements to Consultant/Administrator User Interfaces *30*
Changes to the Documentation and Help *31*

For information on features added through release 6.2.4, see the Demantra Spectrum Feature Changes document, which is available through Demantra Customer Support.

Highlights across Releases

The Demantra Spectrum products have been improved and expanded in a wide range of areas in the past releases. The list below includes the most important changes.

General Highlights

Feature	Details	When new
Performance	Several configurable enhancements improve the performance of worksheets that include promotions, worksheet filtering, and server startup. See "Performance and Architecture" on page 15.	7.0.2
Rename when pasting promotion copy	When you copy and paste an individual promotion, you are prompted for the name for the new promotion. If you copy and paste at a higher level, you are prompted for the new name at that level, but all members below that are named **Copy of** *old_name* as in previous releases.	7.0.2
More flexible Java support	You can use either Sun JRE 1.4.2_10 (default) or Sun JRE 1.5_05 on the client machines. This JRE version does not have to be the same as used on the server. Demantra Spectrum provides a new parameter (**client.javaPlugin.version**) to control the JRE version that is used by the client machines. If you do not use the default version, additional manual steps are required after installation.	7.0.2
Improved screen management	Demantra Spectrum now saves the width of each screen element as a fraction of overall screen size, rather than in absolute terms. This means that you can view the same worksheet with different monitors, without needing to adjust widths.	7.0.1
Administrative logout of users	Demantra Spectrum provides a tool that you can use to log out online users whose sessions have hung due to network or other problems. Non-administrative users can log into this tool and end their own sessions; other users are not visible to them.	7.0.1
TPMO	TPMO is new in this release. See "Demantra Spectrum Applications" on page 1. For information on configuring help for TPMO, see "Documentation and Help" on page 48.	7.0
Settlement Management	Settlement Management is new in this release. See "Demantra Settlement Management, New in 7.0" on page 2.	7.0
BAL	Business Application Language and the BAL Explorer are new in this release. Demantra's Business Application Language (BAL) encapsulates the formal definitions of a Demantra Spectrum solution so that those definitions can be shared readily from one solution to another. You use the BAL Explorer to browse and share these definitions. The BAL Explorer is designed to enable you to do the following actions: • Browse the contents of an existing Demantra Spectrum schema *from any release* • Copy key elements from one schema to another or into a file that can be shared via email • Compare two Demantra Spectrum schemas For a view of this tool, see "BAL Explorer (New in 7.0)" on page 7. Note that the BAL Explorer is packaged and installed separately in this release.	7.0

General Highlights

Feature	Details	When new
Analytics	New parameters provide better handling of promotion dates, trend detection, and other analytical considerations. See “New and Changed Engine Parameters” on page 24.	6.2.x, 7.0
Ability to work offline	A user can export a worksheet to an offline folder, continue to work within the same user interface without a network connection, and later synchronize any changes. This is especially useful for users who do not have continual network access but who still need access to Demantra Spectrum data.	7.0
SSL security	Demantra Spectrum now supports SSL security. See the *Demantra Spectrum Installation Guide* for configuration details.	7.0
Engine profiles	Demantra Spectrum now provides *engine profiles*, which are sets of engine parameters with specific values. Demantra Spectrum provides some predefined profiles for different purposes, and you can define additional engine profiles, as needed. Engine profiles are supported only for the PE Analytical Engine.	7.0
Consolidation of administrative tools	The menus from Business Application Modeler and the Security Manager have been moved into the Business Modeler, so that all these setup/administrative functions can be accessed centrally.	7.0
Faster worksheet running	This release uses a new, faster mechanism (incremental loading) when rerunning a worksheet.	7.0
Faster data saves	This release uses a new, faster mechanism for updates (saving data to the database). This mechanism provides benefit especially when users edit highly aggregated data (which then needs to be split to the lowest level).	7.0
Worksheet enhancements	Several enhancements greatly increase the capability and configurability of worksheets. See “Enhancements to the Web Client” on page 22.	7.0
Audit trail	The audit trail has been enhanced in two general ways: • It now accurately captures all manual changes that users make within a worksheet, including changes to **promotion_data** and other level tables. • When a user views the audit trail from within a worksheet, Demantra Spectrum performs the widest search for relevant data, including looking at level tables.	7.0
Date & string series	Demantra Spectrum provides fuller support for data and string series. This includes new copy/paste preservation styles to use with these series. Also, date and string series can be used in worksheet exceptions. However, Demantra Spectrum does not yet provide functions and operators to allow you to write complex expressions using the date and string series. The Business Logic Engine ignores any series whose value is date or string. Non-numeric series are supported only in the Web-based products (that is, not in the desktop Demand Planner).	7.0

Changes to Software Requirements

In release 7.0, we formalized our process by carefully considering our customers' needs and focusing our testing on explicit combinations or *stacks*. Each stack includes an operating system, a database, a Web server, a J2EE server, and a Java version. Please note the following implications:

- Each of these stacks is tested and is formally supported.
- Other combinations may also work but Demantra does not support them.

For information on the stacks, hardware requirements, and the client requirements, see the *Demantra Spectrum Installation Guide*.

Enhancements to All Products

This section describes enhancements that directly affect the types of results you can get from Demantra Spectrum. Unless otherwise noted, these enhancements affect *all* products. These enhancements are organized as follows:

- "Series" on page 13
- "Levels" on page 14
- "Methods" on page 14
- "Integration Capabilities" on page 14
- "Security Model" on page 15
- "Performance and Architecture" on page 15
- "New and Changed Parameters (Non-Engine)" on page 18
- "Removed Parameters" on page 22

Series

A series is a column of data displayed in a worksheet. Consultants define series as needed. The following table lists enhancements to series.

Series

New feature or feature change	When new
Within a client expression, it is now possible to use a simple expression to refer to a different time bucket. For example, the syntax Demand[-1] to refer to the Demand series for the previous time bucket. In the past, only integers or series names were permitted within these brackets. Now you can instead include a simple expression. For example, if you have series A, B, C, and D, the client expression for D could be something like the following: A[B+C] This syntax allows you to create complex expressions from a smaller number of series. For example, suppose you want to know how much inventory your warehouse will contain on a given date. The date is determined relative to today based on both the production lead time and the transportation lead time. That is, you want to know Inventory[Production lead time + Transportation lead time]. In the past, you would have had to create an intermediate series to store Production lead time + Transportation lead time.	7.0
Demantra Spectrum supports new copy/paste preservation styles: • First, the **As Is** style has been renamed to **Most Common**. • The new **As Is** style shifts the data to the new dates but makes no other changes. • The new **None** style means that the data for this series is not copied. Also, Demantra Spectrum provides a separate option to control how data is maintained when a promotion is moved rather than copied. This option uses all the same settings as the copy/paste preservation option.	7.0
Demantra Spectrum provides fuller support for data and string series. This includes new copy/paste preservation styles to use with these series. Also, date and string series can be used in worksheet exceptions. However, Demantra Spectrum does not yet provide functions and operators to allow you to write complex expressions using the date and string series. The Business Logic Engine ignores any series whose value is date or string. Non-numeric series are supported only in the Web-based products (that is, not in the desktop Demand Planner).	7.0

Levels

A level describes how to aggregate series data, within a worksheet or during integration. Each level has members, and a worksheet displays data for those members. Consultants define levels as needed. This table describes enhancements to level definitions.

Levels

New feature or feature change	When new
For each attribute of a level, you can control whether the value of that attribute is copied and pasted when a user copies and pastes a level member.	7.0

Methods

A method is an action that is launched by a user, from the right-click menu in a worksheet. It performs some predefined processing that is specific to the context where the user clicked. Consultants define methods as needed. This table describes enhancements to methods.

Methods

New feature or feature change	When new
A new option allows you to force a save of the worksheet data before running the method itself. Alternatively, you can ask the user if he or she wants to save the data, or you can simply proceed with the method itself.	7.0
Inputs to a method can be mandatory.	7.0
Numerous changes have been made to the passing of arguments to a workflow used as a method. See the *Demantra Spectrum Consultant's Guide* for details.	7.0
A new option specifies whether a method should refresh the members cache.	7.0
A new option specifies whether the workflow of a method should be run asychronously (as in past releases) or synchronously (requiring the user to wait until the workflow is completed).	7.0

Integration Capabilities

The following table describes enhancements to the core integration capabilities of Demantra Spectrum. For *usability* enhancements related to the tools, see "Business Modeler" on page 30.

Integration

New feature or feature change	When new
Integration now works on date and string series, as well as the numeric series that it has always supported.	7.0

Security Model

The Demantra Spectrum data and menus are secured, so that not all users have access to the same data and options. For information, see the *Demantra Spectrum Administrator's Guide* and the *Demantra Spectrum Consultant's Guide*.

The following table lists enhancements to the Demantra Spectrum security model.

Security

New feature or feature change	When new
The separate Security Manager and Business Application Modeler user interfaces have been removed. To administer security, you now use the **Security** and **Component** menus in the Business Modeler.	7.0
Within any component, you can now control access to all menus in the Web-based user interfaces: • The Collaborator Workbench menus • The menu bars within Demand Planner Web, Promotions Effectiveness, and Settlement Management • The right-click menus associated with each level You can control permission at the group level or at the user level. For any given user and menu item, the user receives the most liberal granted permission. You can enable, disable, or completely hide each menu item. Demantra Spectrum also provides a new right-click option to view (rather than edit) properties of a member, so that you can give users read-only access if needed.	7.0
For more convenient security administration, you can define your own program groups and specify security for them. A program group is a collection of menu items, including right-click menus for specific levels, of your choice. Thus you can create a program group that consists of all the delete-type menu items; this enables you to globally restrict access to these menu items.	7.0

Performance and Architecture

The following table lists improvements to Demantra Spectrum architecture and performance:

Performance and Architecture

New feature or feature change	When new
This release provides new internal data structures to improve the performance of worksheets that include promotions (or other general levels that have population attributes). You can control (via the **UseDateRangeMatrix** parameter) whether worksheets use these structures; the system uses them automatically for other purposes. If you enable this option, the largest benefit occurs in cases where promotions are long (and have many rows of data). This is not yet included in the primary documentation.	7.0.2

Performance and Architecture

New feature or feature change	When new
Internal changes have improved the performance when filtering a worksheet. In addition, a new parameter (**MaxAvailableFilterMembers**) specifies the maximum number of members that can be retrieved in the worksheet filter screen. If the user selects more members than allowed, a message asks the user to add further filtering. This is not yet included in the primary documentation.	7.0.2
For better performance, the Application Server used to cache all members of all levels, but this in turn impacted memory requirements. A new caching mechanism allows you to specify the needed caching policy on a level-by-level basis, depending on the size and usage patterns of your levels. This is not yet included in the primary documentation; see “Specifying Level Caching Policies” on page 16.	7.0.2
All system logging has been combined to a single log file to provide better control. Now, by default, the Application Server writes logs into the directory *Demantra_root*/**Collaborator/***virtual_directory*/**portal/logs**. To change the behavior of this logging, edit the file *Demantra_root*/**Collaborator/***virtual_directory*/**portal/conf/logconf.lcf**. The parameter **DebugMode** has been removed.	7.0.2
Demantra Spectrum now supports SSL security.	7.0
A new parameter allows you to use Java Web Start, rather than the Sun Java Plug-in, when launching the Web client (Demand Planner Web, Promotions Effectiveness, or Settlement Management). See “Web client activation” on page 19.	7.0
This release uses a new, faster mechanism (incremental loading) when rerunning a worksheet: the worksheet reloads only the combinations that have changed since the last load into memory. The same mechanism is used for content panes in the Collaborator Workbench.	7.0
This release uses a new, faster mechanism for updates (saving data to the database). This mechanism provides benefit especially when users edit highly aggregated data (which then needs to be split to the lowest level), and it replaces the **MANUALS_INS** procedure. The **MANUALS_INS** procedure is still needed if you are using the desktop products (Demand Planner and Demand Replenisher).	7.0
Demantra Spectrum now provides an option to cache the aggregated data of a worksheet so that the worksheet can be run more quickly. The data cache can be refreshed automatically in the background or manually by the user who is using the worksheet. The cache option is specified separately for each worksheet, so that you can use the most appropriate setting in each case.	7.0

Specifying Level Caching Policies

Because caching is a tradeoff between memory and speed, a new caching mechanism allows you to specify the needed caching policy on a level-by-level basis, depending

on the size and usage patterns of your levels. To specify how to cache a given level, edit the **group_tables_cache** table, as follows:

Field	Purpose
GROUP_TABLE_ID	Specifies the ID of the level, as given in the **group_tables** table.
CACHE_CAPACITY	Specifies the maximum number of members of this level that will be cached at any time, if **CACHE_TYPE** is **LRU**.
CACHE_IS_LAZY	Specifies whether the cache for this level is completely loaded upon server startup: • 0 (cache is loaded on startup) • 1 (cache is not loaded on startup)
CACHE_TYPE	Specifies the caching policy for this level. Use one of the following values: • SIMPLE (the cache is unlimited for this level) • LRU (whenever the server loads a member beyond this limit of **CACHE_CAPACITY**, the least recently used member is flushed from memory.)
CACHE_LOAD_EXTRA_FROM	Used to filter startup initialization. See **CACHE_LOAD_EXTRA_WHERE**.
CACHE_LOAD_EXTRA_WHERE	Used to filter startup initialization. This field and **CACHE_LOAD_EXTRA_FROM** allow you to define SQL criteria for loading the cache. For example, if the company will mostly work on current year promotions then the consultant may add the From part “promotion_dates” and to the Where part “promotion_dates.from_date > ‘1/1/2006’”. In this way the cache will be initially loaded with promotions from 2006. This does not mean that the cache will be in any way limited to 2006 after its initial load.
ENABLE_STATISTICS	Specifies whether the server should collect statistics on use of this cache.
ENABLE_DEBUG	Specifies whether the server should record information for possible use in debugging issues related to this cache.

New and Changed Parameters (Non-Engine)

This section alphabetically lists the most recent new parameters for areas other than the Analytical Engine.

Note The upgrade procedure (used by the installer) does not change the current values of any existing parameters. It may change the default value of an existing parameter, and the *Demantra Spectrum Installation Guide* will specify any suggested parameter changes. The upgrade procedure does add new parameters and set their values.

See also "New and Changed Engine Parameters" on page 24.

New and Changed Non-Engine Parameters

Area	Parameter	Purpose and allowed values*	When
performance	**UseDateRangeMatrix**	See "Performance and Architecture" on page 15,	7.0.2
	MaxAvailableFilterMembers	These are not yet included in the primary documentation.	
JRE	**client.javaPlugin.version**	Specifies the version of the Java plugin to use for all clients. If you change this version, also place the installer for the appropriate JRE into the *Demantra_root*/**Collaborator**/*virtual_directory*/**plugin** directory on the server machine.	7.0.2
Web client	**client.activationMethod** **client.enableOpenNoteWithDoubleClick** **client.JREMaxMemory** **client.lookAndFeel** **client.MaxCombsLoadChunkSize** **client.MaxWorksheetMemoryUse** **client.worksheet.privateAccessType**	These parameters were renamed for consistency with Java naming conventions.	7.0.2
Settlement Management	**SettlementLocationExtension** **SettlementProductExtension**	Specifies the internal identifier of the location-type and product-type levels with which settlements should be associated.	7.0
	DSMPromotionBudgetSeries	Specifies the ID of the promotion budget series to which adjustments will be made when settlements are matched to a promotion.	7.0
	DSMAllShipDateDifference **DSMOIPercentDifference** **DSMOIShipDateDifference** **DSMPEOIAmountSeries** **DSMPEShipDateSeries**	These parameters control how Settlement Management finds promotions to match to a given settlement. See the chapter on configuring Settlement Management in the *Demantra Spectrum Consultant's Guide*.	7.0
	DSMWriteOffThreshold	Specifies the largest settlement amount that is written off automatically.	7.0

*For details, see the *Demantra Spectrum Reference Guide* and the chapter "Fine-Tuning Demantra Spectrum" in the *Demantra Spectrum Consultant's Guide*.

New and Changed Non-Engine Parameters

Area	Parameter	Purpose and allowed values*	When
Worksheet caching	**EnableWorksheetCaching**	Specifies whether Demantra Spectrum can cache the Web worksheets.	7.0
	ManualRefreshAsDefault	Specifies the default setting of the **Refresh Type** caching option in the worksheet designer.	7.0
	WorksheetCachingAsDefault	Specifies the default setting of the **Cache Worksheet Data** check box in the worksheet designer.	7.0
Other performance	**EnableIncrementalLoading**	Enables the Demantra Spectrum incremental loading feature, for faster worksheet reruns.	7.0
	EnableWorksheetCaching	Specifies whether Demantra Spectrum can cache the Web worksheets.	7.0
	client.JREMaxMemory	Maximum amount of memory (in MB) that JRE can use. The Web worksheets (Demand Planner Web, Promotions Effectiveness, and Settlement Management) use JRE.	7.0
	client.MaxCombsLoadChunkSize	Maximum number of combinations to load each time the user clicks the green "load now" button in a worksheet	7.0
Web client activation	**client.activationMethod**	Specifies the technology used to start the Web client (Demand Planner Web, Promotions Effectiveness, or Settlement Management). Use one of the following values: • 0 = use Sun Java Plug-in • 1 = use Java Web Start (recommended) With Java Web Start, you can log into different Demantra Spectrum versions, and Java correctly manages the Demantra Spectrum jar files so that you do not have collisions.	7.0
	javaPlugin.downloadUrl	URL of the folder from which the Java plugin is downloaded. This parameter specified during the installation. The property allows you to direct the plugin download to other locations outside the application folder, if necessary. This approach, however, is not recommended. The default is an empty string, which means that the plugin will be downloaded from the relative location under web application (/plugin directory) using the same protocol that the application uses.	7.0.1

*For details, see the *Demantra Spectrum Reference Guide* and the chapter "Fine-Tuning Demantra Spectrum" in the *Demantra Spectrum Consultant's Guide*.

New and Changed Non-Engine Parameters

Area	Parameter	Purpose and allowed values*	When
Business Logic Engine	**BLEThreadPoolSize**	Number of threads that the Business Logic Engine can use.	6.2.3
	BLETimeOut	Length of time, in milliseconds, before an idle thread (of the Business Logic Engine) times out.	6.2.3
Database connections	**DBIdleTimeOut**	The database connection idle timeout period, in milliseconds.	6.2.2
	DBPort	The port number of the database server.	6.2.2
	MinDBConnections	The minimum number of database connections for the Demantra Spectrum database user.	6.2.2
Worksheet behavior	**AutoRunMode**	If true, a worksheet automatically reruns after any change in its definition. This parameter now applies to worksheets in both the Web and desktop.	6.2
	client.enableOpenNoteWithDoubleClick	Specifies whether users can access the notes dialog box by double-clicking within the worksheet table. In any case, it is always possible to access this dialog box by using the right-click menu, as in Microsoft Excel.	7.0
	Graph.MaxLabelWidth	Maximum width of labels in graphs in the Web-based user interfaces.	6.2.2
	OpenWithContext	Specifies the default setting of the **Open With Context** setting of the worksheet designer (which is new in 7.0). Previously, the worksheet was filtered to show only the level member from which the worksheet was launched. You can now define the worksheet so that it will be filtered instead by the specific combination.	7.0
	client.worksheet.privateAccessType	Specifies the default setting of the public/ private option in the worksheet designer.	7.0
	WorksheetDefaultDateChoiceMethod	Controls the default start date for worksheets, relative to today, or relative to last loaded sales date	7.0
	WorksheetDefaultSpan	Specifies the default length of time for a worksheet, in base time units. Must be an even number, 2 or greater.	7.0

*For details, see the *Demantra Spectrum Reference Guide* and the chapter “Fine-Tuning Demantra Spectrum” in the *Demantra Spectrum Consultant’s Guide*.

New and Changed Non-Engine Parameters

Area	Parameter	Purpose and allowed values*	When
Promotions	**ColorCodingLevel**	**PE only.** Specifies the ID of the level that will be used to color code promotions.	6.2.2
	PromoDefaultSpan	Specifies the default length of time for promotions created within a worksheet.	7.0
	PromoDefaultStart	Specifies the default start date for promotions created within a worksheet. Use one of the following values: • 0=Today • 1=Last loaded sales date • 2=Start date of the worksheet	7.0
Threading	**threadpool.copy_paste.size** **threadpool.copy_paste.timeout** and others	These parameters control the threading mechanisms in Demantra Spectrum. See the chapter "Fine-Tuning Demantra Spectrum" in the *Demantra Spectrum Consultant's Guide*	6.2.3, 7.0
Other	**align_sales_data_levels_in_loading**	Specifies whether to adjust the **sales_data** table for direct use by the engine, in cases where you configured the Analytical Engine to use that table instead of **sales_data_engine**.	6.2
	Rebuild_Sales_Table	Applies only to Oracle. Specifies whether to rebuild the **sales_data** table when executing the **rebuild_tables** database procedure.	6.2
	RestartOnFailureInterval	Specifies how long to wait (in seconds) before retrying a failed process in the Scheduler.	6.2
	Run_full_matrix_proport	Specifies whether to run the proport mechanism on all the item-location combinations, only the new combinations, or only ones that are flagged specifically for proport.	6.1
	update_dead_comb	Specifies whether the **MANUALS_INS** procedure considers dead combinations. (A combination is dead if its **prediction_status** setting is 99).	6.2.5 E
	useGLExceptions	Specifies whether Demantra Spectrum respects worksheet exceptions that refer to promotion series. Normally, you would prefer to respect all worksheet exceptions. However, for promotion-based exceptions, the worksheets do not behave intuitively: the Members Browser displays all the combinations, regardless of whether they meet the given criteria. When the user clicks on a combination that does not meet the criteria, the worksheet *then* displays a message saying that the combination is empty.	7.0

*For details, see the *Demantra Spectrum Reference Guide* and the chapter "Fine-Tuning Demantra Spectrum" in the *Demantra Spectrum Consultant's Guide*.

Removed Parameters

The following is a list of parameters that Demantra Spectrum used in the past but that have since been removed because they are obsolete.

DBdriver
DBServer
DebugMode
DeleteMemberPermission
DeductionMatchPercent
DeductionMatchTimeWindow
dir.html
dir.loginPage
DeductionMatchPercent
DistributedUpdates
exit_sqls
firstdayinweek (replaced by FIRSTDAYINWEEK)
general.userList.worksheets
Job1interval, Job1Statement, Job2interval, Job2Statement
last_date_check
navBarContentProvider.interpriseContent.txt
Notificationstyle
original_Job1Statement
proport_threshold_wk
secondary_start_date
Server.main.login.url
server.servletdir
server.httpPort
SMART_FILTER_ICON
split_time_out
task.message.taskadded
TemplateDirectory
thread_mode
UpdatesProcName
UseMatrixInFilterReplaceParameter
workflow.physicalpath.dtd

Enhancements to the Web Client

Demand Planner Web, Promotions Effectiveness, and the new Settlement Management use a common Web-based applet, with variations that apply according to the users' licenses. The following table describes changes to that applet:

Demand Planner Web, Promotions Effectiveness, and Settlement Management

New feature or feature change	When new
When you copy and paste an individual promotion, you are prompted for the name for the new promotion. If you copy and paste at a higher level, you are prompted for the new name at that level, but all members below that are named **Copy of** *old_name* as in previous releases.	7.0.2
Demantra Spectrum now saves the width of each screen element as a fraction of overall screen size, rather than in absolute terms. This means that you can view the same worksheet with different monitors, without needing to adjust widths.	7.0.1
You can export a worksheet to an offline folder, continue to work within the same user interface without a network connection, and later synchronize any changes. This is especially useful if you do not have continual network access but you still need access to Demantra Spectrum data.	7.0
Several new parameters control the behavior of the worksheet designer. See "Worksheet behavior" on page 20.	varies

Demand Planner Web, Promotions Effectiveness, and Settlement Management

New feature or feature change	When new
The worksheet designer has been enhanced to support Settlement Management. Most of these features are available for all licenses, as follows: • You can now apply a different filter to each view of a worksheet. This way you can subdivide the data in a worksheet into different logical tabs. • The Activity Browser and Gantt chart are now displayed as the **Activity Details** subtab. • Notes can be seen in the **Notes/Attachments** subtab, which also provides the ability to upload attachments into the Demantra Spectrum database. • You can control which elements (table, graph, and so on) are displayed in any worksheet view. This includes the ability to display either the Members Browser or the dropdown selection lists. • For users who have a license to Settlement Management, you can now display a subtab *within* a worksheet view. The subtab can show further details of the level member currently selected in that view; it shows a worksheet associated with that level, using the level-worksheet association defined within the component.	7.0
A worksheet exception filter can now use date and string series, not only numeric series as in the past.	7.0
When a user sends a worksheet as a task to another user, he or she can choose to filter the task to contain just the current combination.	7.0
You can now view the update queue, which shows data save operations that have not yet been processed.	6.2.6

Additional Enhancements to Promotions Effectiveness

The following table lists enhancements that apply only to Promotions Effectiveness.

Promotions Effectiveness User Interface

New feature or feature change	When new
Users can copy and paste promotions within the worksheet table (in addition to doing this within the Activity Browser as before).	7.0
New parameters provide better handling of promotion dates, trend detection, and other analytical considerations. See “New and Changed Engine Parameters” on page 24.	6.2.x, 7.0
New parameters control how the promotion start and end dates are initialized, within the user interface. See “Worksheet behavior” on page 20.	7.0

Enhancements to Analytics

Most, but not all, Demantra Spectrum products use the Analytical Engine, which runs periodically and generates the forecast. It can also be used in simulation mode, to generate a forecast within a worksheet, typically after the user has adjusted the data in that worksheet. Demantra Spectrum has two engine variants: one for demand planning and one for Promotions Effectiveness.

Analytical Engine

New feature or feature change	When new
The new engine includes an internal change that makes the **sales_data_engine** table smaller, resulting in better performance.	7.0
The new engine now uses *engine profiles*, which are sets of engine parameters with specific values. This enables you to switch easily from one engine configuration to another. Demantra Spectrum provides some predefined profiles for different purposes, and you can define additional engine profiles, as needed.	7.0
For the new engine, you can use data in **mdp_matrix** as a local causal factor.	7.0
For the new engine, new parameters in many areas allow you control things such as the following: • Fast simulation • Date handling for causal factors, especially promotional causal factors • Promotion Optimization • Normalizing historical engine results • Nodal tuning • Engine cleaning • Shape modeling • Trend detection, especially when non-negative regression is enabled • Uplift handling • Detection of and warnings for large simulations See “New and Changed Engine Parameters” on page 24.	varies

New and Changed Engine Parameters

This section alphabetically lists the most recent new parameters for the engine, as well as any changes to Demantra Spectrum’s use of parameters. To edit parameters, use the Business Modeler.

Note The upgrade procedure (used by the installer) does not change the current values of any existing parameters. It may change the default value of an existing parameter, and the *Demantra Spectrum Installation Guide* will specify any suggested parameter changes. Of course, the upgrade procedure does add new parameters and set their values.

New and Changed Engine Parameters

Area	Parameters	Purpose and allowed values*	When
Logging	**LogLevel**	Controls the amount of detail that is written into the Analytical Engine log. Use one of the following values: • 1-Critical • 2-Error • 3-Warning • 4-Message (this corresponds to the amount of detail that the log has contained in past releases) • 5-Info • 6-Detail	7.0.1
Model outlier detection	**DetectModelOutliers**	Specifies whether to check for outlier models for each forecast node. Outlier models are models that do not fit well enough. The sensitivity of the test is controlled by the **ModelValidationBound** parameter. See the *Analytical Engine Guide for Promotions Effectiveness*.	7.0
	ModelValidationBound	Specifies the sensitivity of the test used to detect "outlier" models for a given node. Outlier models are models that do not fit well enough.	7.0
Promotional causal factors	**PromotionStartDate**	**PE only.** Earliest date for which promotion data can be considered reliable. The Analytical Engine ignores any promotion data before this date. This parameter applies only to combinations that have promotions.	7.0
	ShiftDynPromoDate	**PE only.** SQL expression that returns the number of days to *add* to the sales date for any given promotion; typically this is a negative number. If this expression is null, then the default promotion dates are used.	6.2.5 E
	ShiftPromoCausals	**PE only.** Specifies the number of base time buckets by which all the promotional causal factors should be shifted; this applies to the causal factors in the **m3_causal_factors** table. Because this setting is global, you might prefer to use **ShiftDynPromoDate**.	6.2.4
	ShiftPromoMaxValue	**PE only.** Specifies the number of additional future time buckets to bring into history, when shifting promotions to the dates given by **ShiftDynPromoDate**. By default, the Analytical Engine considers only historical promotions and ignores any future promotions. If you shift promotion dates, that typically means you need to shift promotions that are planned for the very near future. This parameter specifies how many time buckets of the future the Analytical Engine should consider when it shifts the promotion dates.	6.2.5 E

*For details, see the *Demantra Spectrum Reference Guide* and the *Analytical Engine Guide for Promotions Effectiveness* (or the *Analytical Engine Guide for Demand Planning*).

New and Changed Engine Parameters

Area	Parameters	Purpose and allowed values*	When
Detection of large simulations	**MatrixCombs**	Indicates the number of combinations in the **mdp_matrix** table.	6.2.6
	SimMaxSize	Specifies the threshold size of a simulation that is too large to run. If a user tries to perform a simulation of this size, Demantra Spectrum displays a message and does not attempt the simulation. Specify this as a percentage of the total number of combinations.	6.2.6
	SimWarnSize	Specifies the threshold size of a simulation that is large enough to trigger a warning message to the user. Specify this as a percentage of the total number of combinations.	6.2.6
Engine cleaning	**DeleteIsSelfCondition**	**PE only.** Specifies an additional true/false condition that must be met to delete unneeded records in **promotion_data**.	6.2.5
	DeleteIsSelfRows	**PE only.** Specifies whether the Analytical Engine deletes unneeded **promotion_data** records. A record is considered unneeded if all the following conditions are true: • It is flagged as **is_self** = 0 • All lifts (uplift, pre and post effect, and switching effects) equal 0 • The condition specified by **DeleteIsSelfCondition** is true	6.2.5
	ResetForeVals	Specifies whether to clean current forecast columns from previous values. If you enable this cleaning, there may be an impact on performance.	6.1
Trend detection	**TrendDampPeriod** **TrendDampStep** **TrendModelForShort** **TrendOutlierRatio** **TrendPreEstimation** **TrendShortRatio**	These parameters control trend detection, which also uses the older **TrendPeriod** parameter. See the *Analytical Engine Guide for Promotions Effectiveness*.	6.2.5
Promotion Optimization	**CalcOptimizationInput**	**PO only.** Specifies whether the Analytical Engine should calculate inputs needed for Promotion Optimization.	6.2.4
	AverageHorizon	**PO only.** Specifies the length of time to be used in calculating the average baseline forecast. This window of time starts at the date given by **StartAverage**.	6.2.4
	StartAverage	**PO only.** Controls the starting date of the time span used to calculating the average baseline forecast. You specify this date relative to **last_date**.	6.2.4
	BottomCoefficientLevel	**PO only.** Lowest forecast tree level for which the Analytical Engine will calculate coefficients. Use any forecast tree level between the lowest promotional level and the **InfluenceRangeLevel**, inclusive.	6.2.4
	TopCoefficientLevel	**PO only.** Highest forecast tree level for which the Analytical Engine will calculate coefficients. Use any forecast tree level between **BottomCoefficientLevel** and the **InfluenceRangeLevel**, inclusive.	6.2.4

*For details, see the *Demantra Spectrum Reference Guide* and the *Analytical Engine Guide for Promotions Effectiveness* (or the *Analytical Engine Guide for Demand Planning*).

New and Changed Engine Parameters

Area	Parameters	Purpose and allowed values*	When
Normalization of history	**NormalizationFactor**	**PE only.** Specifies the degree of normalization to perform, if **NormalizeResults** is **yes**.	6.2.3
	NormalizeResults	**PE only.** Specifies whether to normalize the historical engine results so that the observed baseline values are preserved.	6.2.3
Non-negative regression	**UseNonNegRegr**	Specifies whether to use non-negative constraint estimation for all regression-based engine models.	6.2.2
Shape modeling	**ShapeSign**	Specifies the signs for the shape causal factors when using them in non-negative regression. Use one of the following values: • **0** means that after the preliminary estimation, the signs are kept as is. • **1** means that after the preliminary estimation, the shape casual factors are made positive. This parameter is ignored if **UseNonNegRegr** is set to prevent negative coefficients.	6.2.5
	NumShapes	Maximum number of allowed shape causal factors for the engine to use. Use an integer from 0 to 8, inclusive. For Promotions Effectiveness, you can specify the maximum number of shapes for each promotional causal factor, rather than specifying a global maximum. You specify this in the **Promotional Causal Factors** screen in the Business Modeler.	6.2.3
Nodal tuning	**usemodelspernode**	Specifies whether you can specify the forecasting models to use for specific nodes in the forecast tree, via the **File > Analytics** menu option.	6.2.5
	UseParamsPerNode	Specifies whether you can specify the engine parameters to use for specific nodes in the forecast tree, via the **File > Analytics** menu option.	6.2.5
Uplift handling	**LowerUpliftBound**	**PE only.** Specifies the limit beyond which an uplift value is considered "exceptional." This limit is specified as a proportion of baseline. For each model, the Analytical Engine compares the absolute value of the uplift, divided by baseline, to this parameter.	6.2.2
	UpliftThresholdMethod	**PE only.** Specifies how to determine the uplift threshold.	6.2.2
	UpliftThresholdValue	**PE only.** Uplift and cannibalization values lower than this threshold are automatically set to null.	6.2.2
	UpperUpliftBound	**PE only.** Specifies greatest allowed value of uplifts, expressed as a proportion of the baseline.	6.2.2
Proport	**proport_missing**	Specifies how the proport mechanism treats missing dates. Was temporarily named **missing_values**.	6.2.1
	proport_threshold	Used by proport. Specifies the number of individual observations for any given bucket to calculate the proportions for that bucket (P1-P12). If not enough observations are available, the moving average will be used for that bucket. Was called **min_obs_of_individual_p**.	6.2

*For details, see the *Demantra Spectrum Reference Guide* and the *Analytical Engine Guide for Promotions Effectiveness* (or the *Analytical Engine Guide for Demand Planning*).

New and Changed Engine Parameters

Area	Parameters	Purpose and allowed values*	When
Other	**BatchRunMode**	**PE only.** This parameter allows you to disable the Analytical Engine's learning phase (and use previously cached information). This allows you to configure fast simulations that omit cannibalization effects.	7.0
	CannibalizationIgnore	**PE only.** Controls whether the Analytical Engine will calculate switching effects (cannibalization). You can use this parameter to easily switch off that calculation when needed, for example, when running specific simulations.	7.0
	EnableSimGLFilter	**PE only.** Specifies whether simulation should respect or ignore any promotion-level filtering applied to the worksheet. This parameter has no effect if the worksheet does not include a promotional level.	7.0
	ForecastGenerationHorizon	Specifies what data the engine will write to the database. If this parameter is 0, the engine writes the forecast only. If this parameter is a positive integer N, the engine writes the last N historical fit values.	6.0.1
	RemoveResidOutlier	**PE only.** Specifies the percentage of residuals (by number) to remove before validating the fit. The residuals are sorted by size and the largest residuals are removed.	6.2.5 E
	Rebuild_Sales_Table	Applies only to Oracle. Specifies whether to rebuild the **sales_data** table when executing the **rebuild_tables** database procedure.	6.2
	SdeCreateJoin	Specifies whether the Analytical Engine should join **sales_data_engine** (or its synonym) and **mdp_matrix** during its run.	6.2.3
	ShiftBaseCausals	**PE only.** Specifies the number of base time buckets by which the base causal factors should be shifted; this applies to the causal factors in the **causal_factors** table. The default setting (0) is recommended.	6.2.4
	UseExternalSDUpdate	Specifies how to update the **sales_data** table with the current forecast.	6.1
	UseWeightedRegression	Specifies whether the Analytical Engine applies a weight to each observation when fitting each model.	6.2.5
	WriteMissingDatesUplift	**PE only.** Specifies whether to write uplifts for dates that are missing from **sales_data**.	7.0

*For details, see the *Demantra Spectrum Reference Guide* and the *Analytical Engine Guide for Promotions Effectiveness* (or the *Analytical Engine Guide for Demand Planning*).

Enhancements to the Workflow Module

The Workflow module is often used with Collaborator Workbench but is licensed separately. You use the Workflow Manager to define and manage workflows, which can perform automated tasks (such as import and export) and can send tasks to users. For information, see the *Demantra Spectrum Consultant's Guide*. Also see "Integration Capabilities" on page 14.

Workflow

New feature or feature change	When new
The *Workflow Manager Consultant's Guide* has been removed, and its contents have been placed in other manuals: • The introduction and the chapter on creating workflows have been moved into the *Demantra Spectrum Consultant's Guide*. • The chapter on managing workflow instances has been moved into the *Demantra Spectrum Administrator's Guide*. • The reference chapter for workflow step types has been moved into the *Demantra Spectrum Reference Guide*. These changes meet several needs: • Better cross-references between the workflow information and the relevant parts of the Business Modeler, in particular the information on methods. • All on-going, administrative information within a single manual. • All reference documentation within a single manual, for the benefit of advanced users and consultants.	7.0
A new type of workflow step (**DEI Step**) supports integration for Settlement Management. It runs an integration interface defined within the Demantra Enterprise Integrator (powered by Pervasive).	7.0
The right-click menus on all levels are now implemented as predefined workflows that use the following new step types: **Delete Member Step**, **Edit Member Step**, and **Create Member Step**.	7.0
A new type of step (**Worksheet Cache Step**) allows you to refresh the cache of a worksheet. Users can also force a refresh of their caches, as needed. This step type allows you to refresh the caches in the background.	7.0
The scheduling options within Workflow Manager have been expanded to include two new options: • Start a workflow at periodic intervals (measured in seconds, minutes, hours, days, weeks, months, or years) • Start a workflow whenever the Web server is started (note that this option replaces the 6.2.5 enhancement listed below)	7.0
The **Condition Step** has been expanded so that instead of testing a Demantra Spectrum worksheet, you can test an SQL query or a custom Java class.	7.0
Demantra Spectrum now provides a way for you to automatically launch workflows whenever the Web server is started. To do this, you list the workflows within an XML file. For details, see the *Demantra Spectrum Administrator's Guide*.	6.2.5

Enhancements to Consultant/Administrator User Interfaces

This section describes any changes to the back-end user interfaces that are used t o set up a Demantra Spectrum solution. These changes are mainly for the benefit of the consultant.

- "BAL Explorer" on page 30
- "Business Application Modeler" on page 30
- "Business Modeler" on page 30
- "Collaborator Workbench Administration" on page 31
- "Installer" on page 31
- "Security Manager" on page 31

BAL Explorer

The BAL Explorer is new in 7.0. For a view of this tool, see "BAL Explorer (New in 7.0)" on page 7.

Note BAL Explorer is packaged and installed separately in this release.

Business Application Modeler

The Business Application Modeler was a desktop product used primarily by consultants to define the components, in particular, to specify which series and levels they include. As of 7.0, the functionality of this product has been moved into the Business Modeler. For information, see the *Demantra Spectrum Consultant's Guide*.

Business Modeler

The Business Modeler is a desktop product used primarily by consultants to define the data model, configure levels and series, and so on, for use in worksheets. For information, see the *Demantra Spectrum Consultant's Guide*.

Business Modeler

New feature or feature change	When new
You can now delete any kind of level through the Business Modeler.	7.0
The Business Modeler includes functionality that was formerly in the Business Application Modeler and Security Manager.	7.0
The new menu option **Tools > Series Dependencies** displays all the series on which a selected series depends (via its client expression). It also lists all the series whose color expressions, edit-lock expressions, and summary line expressions use the selected series.	7.0
Several configuration options have been added to the **Promotional Causal Factors** screen. Previously, you specified these options through the database.	7.0

Business Modeler

New feature or feature change	When new
For supplementary data import (**Tools > Import File**), the *interface* and *profile* terminology was reversed, to be consistent with the terminology in the integration interfaces. Now a file load interface consists of import profiles.	7.0

Collaborator Workbench Administration

Collaborator Workbench provides tools for administrative tasks.

Collaborator Workbench Administrator

New feature or feature change	When new
userManagement.jsp lets you log out users whose sessions have hung due to network or other problems. This controls sessions in Collaborator Workbench and in the Web client (Demand Planner Web, Promotions Effectiveness, and Settlement Management). Non-administrative users can log into this tool and end their own sessions; other users are not visible to them.	7.0.1
adminLogin.jsp now controls access to menu items in Collaborator Workbench and in the Web client.	7.0

For information, see the *Demantra Spectrum Administrator's Guide*.

Installer

As of 7.0, the Demantra Spectrum installer has been rewritten using new technology, and the screens in it have been reworked.

Security Manager

As of 7.0, users and groups are defined in the Business Modeler, which contains the menus from the now-obsolete Security Manager.

Changes to the Documentation and Help

In addition to ongoing improvements and additions, we have made several important structural changes.

Demantra Spectrum Concepts (7.0.1)

The new manual, *Demantra Spectrum Concepts*, is an expansion of the previous *Getting Started Guide*.

New Feature Flags (7.0)

Because the documentation is undergoing continual improvement in addition to being expanded for new features, all the features that were added in 7.0 have been flagged as new, wherever they appear in the documentation. This includes the parameter reference chapters and the rest of the *Demantra Spectrum Reference Guide*.

This way, the documentation can be used with earlier releases of the software, to take advantage of important rewrites and newly written tips.

New Tips and Troubleshooting Sections (7.0)

The *Demantra Spectrum Installation Guide* contains a new appendix of useful tips, particularly for Tomcat.

The *Demantra Spectrum Administrator's Guide* contains a new appendix that lists possible error conditions, describes their causes, and describes how to solve them. This appendix will be expanded as much as possible in every future release.

Demantra Spectrum Consultant's Guide (7.0)

The new *Demantra Spectrum Consultant's Guide* includes the following three old manuals, combined:

- *Business Modeler Consultant's Guide*
- *Business Application Modeler Consultant's Guide*
- *Workflow Manager Consultant's Guide*

From *Workflow Manager Consultant's Guide*, the chapter on managing workflow instances has been moved into the *Demantra Spectrum Administrator's Guide*. The reference chapter for workflow step types has been moved into the *Demantra Spectrum Reference Guide*.

The *Business Application Modeler Consultant's Guide* was folded into this manual because the Business Application Modeler itself was combined with the Business Modeler. As for the changes to the workflow documentation, these changes meet several needs:

- Better cross-references between the workflow information and the relevant parts of the Business Modeler, in particular the information on methods.
- All administrative information within a single manual.
- All reference documentation within a single manual, for the advanced users and consultants.

The *Demantra Spectrum Consultant's Guide* also contains a new chapter on configuring non-engine parameters, to supplement the *Demantra Spectrum Reference Guide*.

3 Defects Fixed in This Release

This chapter describes the defects that have been fixed in the current version. It includes the following sections:

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Applet and JRE *34*
Audit Trail *34*
Business Logic Engine *34*
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Analytical Engine and Analytics

- (16844) When the new engine was in DP mode, simulations failed because the **PROMO_AGGR_LEVEL** parameter was not set. The simulation failed with the following error:

  0:12 ERROR <IRIS> 0:09 ERROR Unknown Error
  0:12 ERROR <IRIS> 0:09 ERROR Could not create SalesDataEngine table

- (15561, fixed in 6.2.1) A single machine can now run multiple engines with different software versions.
- (15339, fixed in 6.2.1) On SQL Server, the **INSERT_UNITS** procedure never completed.
- (15340 and 15341, fixed in 6.2.1) Performance issues on SQL Server have been addressed. The ProcessTempTable and CreateSalesDataEngine procedures had run very slowly and had generated a large number of locks.
- (14985, fixed in 6.2) The Distributed Engine used to hang on SQL Server.
- (8946, fixed in 6.1.1) The engine generated forecast data for new products only for time buckets where you chained the forecast.

Applet and JRE

- (18693, fixed in 7.0.2) If you accessed the Web client by means of the partner URL (**http://***server name/virtual directory***/portal/partnerLogin.jsp**), the Web applet was started using the wrong JRE plugin.
- (18383, fixed in 7.0.2) If you used a non-default port to download the plug-in, and if you were using JRun or Websphere, the download did not work correctly.

Audit Trail

- (17634, fixed in 6.2.5 patch E) The audit trail did not show the original value for the change you made.
- (Fixed in 6.2.5 patch A) Performance improvements were made to the audit trail.

Business Logic Engine

- (16130, fixed in 6.2.4) The Business Logic Engine did not work when the log was set to off.

Business Modeler

- (17268, fixed in 6.2.5 patch D) An error occurred if you tried to delete a general level through the Business Modeler. The level was only partially deleted.
- (17244, fixed in 6.2.5 patch D) The Business Modeler did not allow you to create a series that referred to a product attribute. The Business Modeler rejected the series during verification.
- (16833, fixed in 6.2.5 patch D) In the Business Modeler, the build new model and rebuild data model options threw errors.
- (9117, fixed in 6.2) If you added new time buckets (with different resolutions), the build model option (in the Data Model Wizard) would remove them without asking. It now leaves them as is.

- (9041, fixed in 6.2) For a series definition, if you changed the selection in the **Data Table** field, Business Modeler automatically removed the existing data from the table where it had been originally stored without warning you or asking for confirmation. Business Modeler then created a new, empty column in the newly selected table.
- (8752, fixed in 6.2) When the Constraint Profit Optimizer encountered a carton with zero volume, it hung and never continued to the next member.
- (926, fixed in 6.2.3) An error occurred if you tried to create an integration interface on a promotion level.

Collaborator Workbench

- (14949, fixed in 6.2.4) A worksheet could not include an apostrophe (‘) in its name. If it did, you were unable to open the worksheet from Collaborator Workbench.
- (14220, fixed in 6.2.3) For a given user, if you specify the planning environment for a user as desktop, the user was not able to access worksheets through Collaborator Workbench.

Documentation and Help

- (16897, fixed in 6.2.5) In the Web client, the Help file links did not work.

Exceptions

- (16542, fixed in 6.2.5) When a worksheet included a Members Browser, the exception mechanism didn’t work as expected. All combinations were shown, not just the ones that meet the exception criteria.
- (14588, fixed in 6.2.4) If a worksheet includes general levels and an exception filter, the worksheet filters were disregarded. Now if the worksheet includes a promotion level or a promotion series, exception filtering behaves slightly differently from usual. 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. This is documented in the user guides.
- (14516, fixed in 6.2.4) A worksheet exception did not return the correct combination when using series based on a general level.

Installer and Upgrade

- (18586, fixed in 7.0.1) The upgrade added a new option (Synchronous WF) to the level methods. For all level methods, the upgrade incorrectly set this option on (rather than off), so that the behavior of your methods was changed.
- (15427, fixed in 6.2.1) When the installer created the database user for Demantra Spectrum data, it did not give DBA access to that new user, although it should have done so.
- (9200, 9201, 9192; fixed in 6.2) Issues with the upgrade have been resolved.

Integration and Data Loading

- (18883, fixed in 7.0.1) If you tried to import an promotion with no population, Demantra Spectrum wrote all the imported promotions into an error table. It now writes the error if needed, and proceeds to import the other promotions correctly.
- (18576, fixed in 7.0.1) Rerunning an open worksheet did not show new data that existed as a result of the import data process, even if that new data was imported after the worksheet was first opened.
- (17267, fixed in 7.0.1) It is now possible to do an incremental export of a level. Previously this functionality was unavailable.
- (17243, fixed in 6.2.5 patch D) When you used an integration interface for a general level, it loaded the parent levels by their internal ID instead of by their codes. The internal IDs are for Demantra Spectrum only and are not meant to be used by external systems.
- (17115, fixed in 6.2.5 patch D) There were problems loading fictive members via integration.
- (17042, fixed in 7.0.1) Incremental data export had exported all data, rather than just the changed data.
- (17069, fixed in 7.0) It had not been possible to import promotion series aggregated only at the promotion level, using matrix (stored) proportions.
- (16560, fixed in 7.0.1) In the Integration Interface Wizard, if you made certain changes to an existing integration interface, the changes were not saved correctly and an error message was displayed.

- (16406, 16392, 16366, fixed in 7.0.1) Several bugs had prevented integration from working correctly on SQL Server.
- (16375, fixed in 7.0.1) On SQL Server, the procedure **MANUALS_POPULATE_INS** ran with errors and did not write the correct values to the database.
- (14988, fixed in 6.2) The ep_load_locations procedure threw an error.
- (14705, fixed in 6.2.1) It is now possible to update general level series via integration.
- (14620, fixed in 6.2) When you import data via integration, it is aggregated in the same direction (backwards or forwards) as chosen in the Data Model Wizard. The default direction is backwards. (Data imported via integration used to be aggregated forwards.)
- (14511, fixed in 6.2.4) When importing general levels, the performance was not good.
- (9235, fixed in 6.2) Bugs in manuals_populate_ins, manuals_ins_integration and dynamic_sync have been fixed.
- (9216, fixed in 6.2) Integration Interface for export did not work.
- (8976, fixed in 6.2) The item and location hierarchy values in mdp_matrix were not updated to reflect the actual loaded values.
- (8942, fixed in 6.2) In some cases, mdp_add failed after loading new data and an error occurs.
- (8992, fixed in 6.2) Integration used to fail if you used Code instead of Description.
- (8797, fixed in 6.2) MDP_ADD with MDP_LOAD_ASSIST failed when parameter **add_zero_combs_to_mdp** is set to 0.
- (8668, fixed in 6.2) The **ep_load_sales** procedure failed in cases of very large number (millions) of rows.
- (8629, fixed in 7.0) When you ran integration for general level series, the series were not updated if you specified matrix proportions.
- (8329, fixed in 6.1) The **ep_load_sales** procedure took an unnecessarily long time.

Members Browser and Properties Window

- (16269, fixed in 6.2.4) In a member properties window, the properties were sorted by internal identifier. Now they are sorted alphabetically.
- (14486) In the Members Browser, when you deleted a member, sometimes the member was not immediately removed.

- (14288, fixed in 6.1) When you created a new member, you were not able to specify its attributes as long values; if you did, it was not possible to save the new member.
- (Fixed in 6.2.3) The Member Properties dialog box displayed the **Code** field, which is for Demantra Spectrum internal use only. This field is no longer visible.

Member Management and Chaining

- (17057, fixed in 6.2.5 patch C) It was not possible to enter chaining factors greater than 999.99%.
- (16395, fixed in 6.2.5 patch C) Chaining Management did not behave correctly when filters were used in the chaining operation.
- (16332, fixed in 6.2.4) When trying to move a member from one combination to another, the database update was incorrect.
- (15274, fixed in 7.0.2) On SQL Server, errors occurred when you create a new combination while you filter on matrix members within Member Management.
- (9290, fixed in 6.2.1) Chaining now works for filtered levels (levels that are created with an **extra join** statement). This includes levels such as Plant and Sales Area in the National Foods demo.
- (9280, fixed in 6.2) Chaining performance has been improved for large data sets.
- (9265, fixed in 6.2) On SQL Server, the filter in Member Management did not work.
- (9217, fixed in 6.2) An error occurred when trying to delete a newly added member.
- (8188, fixed in 6.1) Previously, when a target had more than one source for the same combination and when item or location population is SOURCE, the values would be doubled. The chaining is now performed correctly.
- The splitting mechanism in the Chaining Management has been fixed. Previously, the system ignored members at the aggregated level that did not have dates, and the proportion that was supposed to be assigned to the children was not assigned to them (and was not assigned elsewhere, either).

Notes and Attachments

- (18714, fixed in 7.0.2) In some cases, when you downloaded an attachment, Demantra Spectrum downloaded the file with a generic file type (File). In order to use the file, you had to rename it, to change its file extension.
- (14961, fixed in 6.2.4) It was not possible to close the notes screen after creating a new note, saving it, editing it and saving it again.
- (14752 and 9237, fixed in 6.2) The performance of notes has been improved.

- (14677, fixed in 7.0.1) On SQL Server, the note screen was not closed after you edited a note and tried to close this screen.

Other

- (15345, fixed in 6.2.1) Filtering matrix levels was very slow on SQL Server.
- (14920, fixed in 6.2) SQL Server locking issues have addressed.
- (9177, fixed in 6.2) SQL Server performance issues have been addressed.

Promotions, Activity Browser, and Gantt Chart

- (18985, fixed in 7.0.2) If you copied and pasted a scenario (or other aggregate promotional level), and if you did this in any location other than the Activity Browser, the promotions within that scenario were not copied.
- (17239, fixed in 6.2.5 patch D) When a promotion attribute was changed, an internal flag should have been set, to indicate that the promotion had been edited. This flag was not set.
- (17223, fixed in 6.2.5 patch D) Promotion dates were shifted one week internally.
- (17211, fixed in 6.2.5 patch C) It was not possible to make edits to promotion data rows that correspond to pre- or post-promotion effects (that is, rows where is_self=0).
- (17209, fixed in 6.2.5 patch C) For your convenience, a new procedure (**DELETE_INVALID_GL_POPULATION**) checks the **promotion_data** table for invalid records and deletes them.
- (17207, fixed in 6.2.5 patch C) The action of copying and pasting a promotion created the wrong records internally.
- (17145, fixed in 6.2.5 patch C) In certain rare cases, data changes to promotions were not saved correctly.
- (16835, fixed in 6.2.5 patch D) It was not possible to change the population for an existing promotion.
- (16688, fixed in 6.2.4) Promotions Effectiveness crashed when a user selected more than one cell and then right clicked.
- (16525, 6.2.4) Multiple promotions with the same name are now supported.
- (16490, fixed in 6.2.4) When you copy and paste a promotion, the population attribute of the promotion is now copied as well.
- (16354, fixed in 6.2.4) A worksheet that included a promotion level now displays only dates that are associated with promotions.
- (15136, fixed in 6.2) The Activity Browser did not include a scroll bar in cases where it should have.

- (15086, fixed in 6.2) Cancelling a copy of a promotion did not entirely cancel the action.
- (14746, fixed in 6.2.4) Copying at the scenario level was very slow due to several unnecessary internal steps. The performance has been improved.
- (14704, fixed in 6.2.3) When the integration, or a user, created a promotion for dates that did not yet exist in **sales_data**, no rows were created in **promotion_data**. When these records were later added to **sales_data**, the **promotion_data** table was not automatically synchronized.
- (14175, fixed in 6.2) Worksheets were not filtered correctly for promotions and promotion dates. The result of the worksheet also showed combinations and promotions that did not fall within the filtered combinations and the selected dates.

Scheduler

- (16353, fixed in 6.2.4) The Scheduler did not release all the threads that it was using. Eventually this used up all of the server resources.
- (8757, fixed in 6.1) On SQL Server, if you scheduled a job to run any time the next day or later onwards, Scheduler did not execute the job.

Security

- (19029, fixed in 7.0.2) If you disabled the Edit menu, users could still cut, copy, and paste, by means of the standard Ctrl-x, Ctrl-c, and Ctrl-v keystrokes.
- (Fixed in 6.2.5 patch A) With SSL security, a login timing problem occurred. Note that SSL security is not fully supported before release 7.0.

Series, Client Expressions

This section lists fixed defects related to all types of client expressions, including edit-lock and color expressions, for example.

- (17040, fixed in 6.2.5 patch E) Client expressions were not updated on the fly at all times.

Series, Special Configurations

- (16834, fixed in 6.2.5 patch D) A series that was aggregated by promotion was not summed correctly at higher levels.
- (16436, 16379; fixed in 6.2.4) For series that are aggregated by promotions, these series are aggregated across all dates, instead of just promotion dates.

Settlement Management and UPGRADE_TO_DSM

- (19002, fixed in 7.0.1) The **upgrade_to_dsm** procedure sometimes failed when you ran in manually.
- (18779, fixed in 7.0.2) The series Customer Invoice and Supplier Invoice used the wrong display format.
- (18656, fixed in 7.0.1) If you tried to open the Notes screen from the Proposed Event Matches subtab, the Notes screen was not displayed and you received errors.
- (18641) For the following series, the summary line function needed to be changed from **SUM** to **MAX**:

  Customer Check Date
  Customer Invoice Date
  Supplier Check Date
  Supplier Invoice Date
- (18611, fixed in 7.0.2) The Settlement Level export interface did not work.
- (18432, fixed in 7.0.2) The **Settlement Account Summaries** and **Settlement Account Summaries** worksheets included the **Activity Details** subtab by mistake.
- (18430, fixed in 7.0.2) In the Business Modeler, the Approved Event Product and Unapproved Event Product series were not stored on the Settlement level as they should have been.
- (18422, fixed in 7.0.2) The Settlement Level import interface did not import dates. No message is given.

Simulation

- (17241, fixed in 6.2.5 patch C) When you tried to cancel a failed simulation (in the simulation queue screen), the system would hang.
- (17225, fixed in 6.2.5 patch C) Simulation was not working.
- (9199, fixed in 6.2) Performance issues have been addressed.
- (8302, fixed in 6.2.1) Simulation with the forecast analytics option has been fixed.
- (1015, fixed in 7.0) When you ran a simulation on a worksheet that was filtered by a promotion level, simulation ignored the promotion filter and operated also on combinations that were not present in the worksheet, causing the simulation to run needlessly slowly. This behavior has been corrected. If necessary, you can set a parameter to achieve the older behavior; see “EnableSimGLFilter” on page 28.

Update (Saving Data in a Worksheet)

- (17246, fixed in 6.2.5 patch D) Demantra Spectrum did not split data correctly when users edited a value in a promotion series that is defined as proportional to another series.
- (15402, fixed in 6.2.4) Proportional split did not work if you used an alternative unit of measure.

Workflow

- (17224, fixed in 6.2.5 patch C) The Workflow starter servlet did not behave correctly. This servlet is used when you include a workflow in *Demantra_root*/**Collaborator/***virtual_directory***/WEB-INF/web.xml** so that when the Web server starts, it automatically launches the workflow.
- (17208, fixed in 6.2.5 patch C) When a workflow included simulation, if that simulation failed, the workflow owner did not receive notification.

Worksheets (Web Client)

- (17290, fixed in 6.2.5 patch D) An error occurred when trying to use a worksheet that included a new, alternate general level.
- (17326, fixed in 6.2.5 patch D) If a worksheet included a series that referred to the promotion status, Demantra Spectrum erroneously displayed a message saying that the worksheet had no data. Errors were shown in the Java console.
- (15425, fixed in 6.2.3) When you reran a worksheet or when you logged in again, the option "Hide Empty Rows" was reset to the original setting.
- (14137, fixed in 6.1) When you exported to Microsoft Excel, you did not get the correct link.
- (Fixed in 6.2.5 patch A) Performance improvements were made to worksheet run time.
- (17291, 17295, fixed in 6.2.5 patch D) The window/tab choice was not saved as part of the worksheet layout. This choice should have been saved automatically, per user, along with the size and position of each element.
- (17055, fixed in 6.2.5 patch C) For a series formatted as a %, the summary value was incorrect.
- (16995, fixed in 6.2.5 patch A) When you moved the worksheet splitters, that erroneously caused the save dialog box to pop up.
- (16820, fixed in 6.2.5) Unable to connect to server error - Unnecessary combination were retrieved when worksheets were rerun.
- (16809, fixed in 6.2.5) Out of memory - Can't create native threads on server side. The client tried to load a huge amount of combinations from the server to the client (thousands).

- (16792, fixed in 6.2.5 patch A) If more than a thousand worksheets were in the system, it was not possible to open any worksheet (from the Web user interfaces).
- (15343, fixed in 6.2.1) Multi-user worksheet performance has been improved. The performance had been bad on SQL Server.
- (15144, fixed in 6.2) In some cases, the worksheet layout became corrupted because the Layout Designer did not record the fact that changes had been made.
- (15092, fixed in 6.2.4) On SQL Server, you could not sort on all the levels on a worksheet axis.
- (14750, fixed in 6.2) Export to Excel has been fixed.
- (14579, fixed in 6.2) The graph display was not always good, depending on the machine used and the resolution chosen.
- (14721, fixed in 6.2) If you selected multiple worksheets cells that used a dropdown series, you did not get a list of choices as you normally would with a single cell. This has been fixed.
- (13211, fixed in 6.2) The summary line of a worksheet table always rounded the numbers instead of using the precision specified by the series definitions.
- (14996, 15005; fixed in 6.2) The series numeric display format was not respected in the worksheet.
- (13120, fixed in 6.2) The series numeric display format was not respected when the worksheet was printed.
- (15060, fixed in 6.2) When one user redefined the layout of a worksheet, all other users of that worksheet saw that change.

4 Known Defects and Limitations

This chapter describes the unresolved issues in the released version. These defects will be fixed in the future.

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Notes

- Make sure you install any patches or service patches for the third-party software that you use, including the database software.
- Also make sure that you complete all the manual upgrade tasks described in the *Demantra Spectrum Installation Guide*.
- Be sure to see the “Troubleshooting User Problems” appendix in the *Demantra Spectrum Administrator’s Guide*.

Analytical Engine and Analytics

- (19107) For new models, the system parameter **max_fore_sales_date** is set to 1/1/1900, which means that the first time **Insert_units** is run, the **sales_data** table becomes huge (this procedure creates records for all dates up to **max_sales_date** + *lead time*). To correct this, change the system parameter to a more suitable value.
- (16177) If you are performing activity shape modeling, do not use the Arx and Arix models. If you do use these models, the shapes will not be captured accurately.
- (7555) When you use local causal factors such as price, promotion attributes, and so on, it is strongly recommended that you use FillMethod=2025 (Fill Omit).

  If you use a different FillMethod, the engine will fill the local causal factors with zeros, and the forecast may be distorted. If the causal factors represent isolated events, the distortion will not be detrimental.
  There is no issue with global causal factors.
- Check the *Demantra Spectrum Reference Guide* for information on which models work with the Promotions Effectiveness engine.
- For Promotions Effectiveness, you can run the Analytical Engine in recovery mode, but the recovery may fail.
- For Promotions Effectiveness, the minimum number of observations for the lagged models (Cmregr, Elog, Arlogistic, Arx, Arix) must be more than three. The Business Modeler user interface does not check this value, but should do so; this concerns both the Causal Factors window and the Models per Node Configuration window.

Business Logic Engine

- The standard error calculation for safety stock is incorrect when series values are null. Null values in the series used to calculate safety stock propagate as zero error, with the effect of lowering the overall error. To work around this, make sure there is a client expression that sets series value as zero if null (for Final Plan, for example).

Business Modeler

- (19364) When you create a new parent level for a combination level or a time level, the Business Modeler does not insert all the required fields.
- (19340, 19298, 19060) The Build Model step fails on SQL Server.
- (18396) Build Model fails on the National Foods demo.
- (14455) Do not use apostrophes in descriptions or codes of anything in the database (for example levels or series). If you use apostrophes in levels, be sure to

run the procedure **replace_apostrophe_levels** before you try to update the database.

- (9085) You should use the Data Model Wizard as much as possible *before* using the other parts of the Business Modeler (such as Configure Levels). If you use the Data Model Wizard and run its upgrade, you will lose changes that you made outside this wizard. For example, if you use Configure Levels to modify the description of levels, and if you run the Data Model Wizard upgrade, you will lose those changes.
- (8578) The Worksheet Manager shows worksheets in use even when they are closed.

Collaborator Workbench

Also see “Worksheets (Web Client)” on page 58.

- (19331, 18609) In some cases, you cannot run methods from Collaborator Workbench. Nothing happens and an error is written to the Java console.
- (19093, 19265) Content windows sometimes display incorrect numbers.
- (18898) When you receive a worksheet that was sent as a task, if you have not opened that worksheet before in the usual way, you receive the “object error” message when you try to open it from **My Tasks**.
- (18608) Errors occur when you create Members Browser-type content and refresh the content.
- (18523) If you specify the client activation method as Web Start (see the *Demantra Spectrum Consultant’s Guide*), the send as task option in the Web client does not work. Users can, however, send a worksheet as a task from Collaborator Workbench.
- (18409, 18407) If your system is configured to use Web Start (via the **client.activationMethod** parameter), users receive permission errors if they try to create new content or edit existing content.
- (18135) If your system is configured to use Web Start, when a user logs out of Collaborator Workbench, the user is not automatically logged out of the Web client as well.
- Errors occur when you open pie chart content as a worksheet from Collaborator Workbench. These errors also occur with stack bar chart content.
- (15211) If your session expires, close the browser window and open a new browser window before trying to log on again.
- (14874) For a stacked bar chart used as content, the results for filtered members are not correct when opening the content via Demand Planner Web.

- (14698) Content does not work if it uses a unit of measure that contains an index.
- (14480) The Members Browser does not correctly display Hebrew when used as content in Collaborator Workbench.

Demand Planner (Desktop)

This section lists issues that may occur in Demand Planner or Demand Replenisher.

- (8469) The thread_mode parameter controls whether it is possible to cancel a worksheet once it starts running. Due to issues in the supporting tools that Demantra Spectrum uses, the Cancel button does not consistently work in the desktop user interfaces (Demand Planner and Demand Replenisher). No such issues have been observed with the Web-based user interfaces, however.

  The parameter is still present in an informal sense, for the benefit of any customers who have been using it without problems. However, it has been removed from the documentation.

Documentation and Help

- The *TPMO Demo Script* omits the following optional configuration steps:

  To configure the TPMO help:

  a. Rename the *Demantra_root*/**Collaborator/***virtual_directory*/**portal/help** directory to **help-original** (for example).

  b. Create a new, empty **help** directory in the same place as the one you just renamed.

  c. Copy all the files from *Demantra_root*/**Documents\TPMO_Help** directory into this directory.

  The help links from the Web client will now go to the TPMO help instead of the standard help.
- Not all the graphics in the help have been optimized for online display, and a few graphics are blurred. This will be fixed in a future release.

Exceptions

- (18528) Exceptions do not work on %-format series, even if **useGLExceptions** is on.
- (18513) In the worksheet wizard, if you enter an invalid date when you create an exception, an error occurs (on the server). You can close the wizard, leaving it in an invalid state (without a value specified for the exception).
- (14588, fixed in 6.2.4) If a worksheet includes general levels and an exception filter, the worksheet filters were disregarded.

- If the worksheet includes a promotion level or a promotion series, exception filtering behaves slightly differently from usual. 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. This is documented in the user guides.

Installation and Upgrade

For issues related to the **upgrade_to_dsm** procedure, see “Settlement Management and UPGRADE_TO_DSM” on page 55.

- (18531) The installer hangs if the locale is not English, for the computer where you are running the installer.
- (19338) The database upgrade fails on SQL Server when it reaches UPGRADE_DB_LEVELS.
- (19073) The database upgrade fails to call CREATE_UPGRADE_DB_53, which means that upgrades from older versions do not work.
- (18555) If you upgrade a database several times, the upgrade may create duplicate methods. Review the methods in your system and delete any extraneous ones.
- During an upgrade (or while running the **Build Model** option of the **Data Model Wizard**), you might see an error like the following:

```
ERROR at line 1:
ORA-20001: Error in Procedure FINISH ORA-20002: ORA-06502: PL/SQL: numeric
or value error: character to number conversion error
Error in   line
executing ACTIVE_PROC_DYN('build_sync_functions')
ORA-06512: at "ETH_DPPRD.DATA_MODEL", line 19
ORA-06512: at "ETH_DPPRD.DATA_MODEL", line 4908
ORA-06512: at "ETH_DPPRD.DATA_MODEL", line 4937
ORA-06512: at "ETH_DPPRD.CALL_DATA_MODEL", line 35
ORA-06512: at line 1
```

  This error is typically caused by an incompatible version of the database procedure **who_called_me**. The short-term solution is to create an empty **who_called_me** procedure as follows:

```
CREATE OR REPLACE PROCEDURE
 who_called_me(name OUT VARCHAR2,
               lineno OUT NUMBER,
               caller_t OUT VARCHAR2 ) AS
begin
dbms_output.put_line('Dummy - who_called_me');
end;
```

- If you are installing on a demo server, you must use the port 8080 within the address of the root web site. Other ports are not supported.

- (15823) If a level attribute is configured as “Create as Level” and you upgrade the database, the parent level becomes the child level, and vice versa.
- (15166) If you have Easy CD Creator installed on the machine where you are running the installer, an error occurs during installation. When the installer registers the Analytical Engine, it launches Easy CD Creator, which in turns instructs you to put a CD into your machine. To work around this bug, use the Task Manager to end Easy CD Creator (which you’ll need to do twice). Then the installer continues as usual.
- (15137) The database upgrade damages hierarchy relationships among matrix-type levels.
- (14885) If you plan to use the Demand Planner - National Foods demo for any purpose, be sure to choose to install default PE data structures. Without these tables in place, the demo does not work and will cause Web server errors.
- (13609) After upgrading, if server/client locales differ, it is not possible to see the month titles in table content.
- (8384) The upgrade procedure sometimes drops unit definitions associated with custom combination levels (ex. territory).

Integration and Data Loading

- (19157) The ep_load_sales procedure is accumulating data rather than updating.
- (19031) The manuals_populate_ins procedure fails when you run it after importing data.
- (19084) For integration with actual proportions, when trying to import history data when the proportion-calculation series is a forecast series, the manuals_populate_ins procedure enters zeros instead of the real values. When you repeat the operation, the correct values are imported
- (16347) The Advanced Selection options in the Integration Interface Wizard do not work.
- (16216) New combinations created through integration are getting stamped with the wrong do_fore and prediction_status. They should receive do_fore=1 and prediction_status =98 (as when new combinations are created through Member Management).
- (14563) Integration fails when you use Code instead of Description.
- (8584) Integration does not support missing values.
- (Req 590) When you import values into tables and you specify the source as fixed-width fields, Demantra Spectrum does not automatically strip leading or trailing spaces from the imported data.

Member Management and Chaining

- (18488) An error occurs if you try to create new combinations and you are filtering by a combination level.
- (18403) Member Management does not update the last_update_date field of the newly created combination.
- (15925) New target combinations are not created when they should be.
- (15270) Errors occur when you try to create a new member that belongs to two hierarchies within the same dimension.
- (14980) You cannot add a member if you have disabled any of its parent levels within the component.
- (14688) When you add a new member and link it using general level attributes, the application server is not updated with that information, even if you restart the Web server.

Members Browser

- (19353) Copy/paste actions fail in the Members Browser if you try to operate on a higher level (not the lowest level).

Methods

- (19357) If the caching policy for a level is LRU, methods on that level fail with an error in the Java console. (For information on member caching, see “Performance and Architecture” on page 15.)
- (18644) For any method that changes attribute values, the method’s workflow must include an **Edit Member Step** as its first step. Otherwise, the changed values will not be saved to the database.
- (18066) If a level method is configured with the **Action when Initiate** option set to **Save Data**, the worksheet data is not in fact saved.

Notes and Attachments

See also “Security and User Management” on page 53.

- (18882) When you try to load a large attachment (more than 2 MB) to a note, memory errors occur and the attachment is not loaded.

Offline Worksheets

- (19038) When you edit a dropdown-type series in an offline worksheet and then synchronize the data to the database, the changes to this series are not saved.

- (18922)When you open an online worksheet that has offline changes and choose to discard all offline changes and offline content, Demantra Spectrum closes the *online* version.
- (18585) When you export to offline, Demantra Spectrum exports only the combination on which you made a change since the last worksheet rerun. Recommended workaround: work in online mode, make changes, and then export to offline again without rerunning the worksheet.

Other

- (16748) In some cases, external notifications, such as simulation and security changes, are missed because the Web server is overloaded. If you are using IIS and JRun, you can work around this by pointing all the external notifications to the internal JRun web server rather than to the IIS and JRun connector. To do so, set the AppServerUrl parameter to use the default JRun port (8100). For example:

  http://mayflower:8100/b2b

  To edit this parameter, use the Business Modeler.
- (15798) Make sure not to create two series that have the same synchronization field. Such series will result in an engine error.

Promotions, Activity Browser, and Gantt Chart

- (19345) When you delete promotions, they are deleted from only one of the internal tables in which they are stored.
- (19249) When you copy and paste a scenario in a worksheet that contains an exception filter, Demantra Spectrum ignores the exception filter and pastes even those promotions that should be filtered out by the exception.
- (18972) When creating a new promotion from empty space in the activity browser, the animated icon does not appear and the worksheet is not reloaded automatically.
- (18759) The Gantt view is blank when a promotion level is hidden in a multi-view worksheet.
- (18552) If you have multiple promotions with the same name and you have promotions on a worksheet axis (crosstab layout), the wrong population may be apparently be updated when you make changes. If you close and reopen the worksheet, you will see that the correct population was updated.
- (18532) You cannot copy a promotion from a worksheet table and paste it into the Activity Browser. You can, however, copy and paste in the other direction.
- (18282) In a certain case, a promotion series can be editable even where there is no promotion. The case is if a worksheet does not include general level aggregation, does include a general level series, and the user deletes a promotion from the underlying population (in the Activity Browser).

- (17438) The elapsed length of a promotion is calculated incorrectly, if the promotion start and end dates do not fall on the dates of your system's time buckets. For example, if a promotion runs from Wednesday to the following Tuesday (a duration of one week), and if you have a weekly system with weeks starting on Monday, then this promotion will be stored as a two-week promotion. This can result in overstated volume, spending, and so on.
- (14977) The Activity Browser is not refreshed properly and sometimes has inaccurate contents. In particular, if you delete a member, sometimes the member is not immediately removed.
- (14962) When you create an additional worksheet tab, the promotion indicators are not used on that tab. Also the Activity Browser is not available.
- (14927) When you delete a member from an aggregated promotion level, the indicator in **sales_data** is not updated.
- (14640) No indicators are shown for existing promotions in a worksheet that contains time levels.

Promotion Optimization

- (19077) Promotion Optimization does not work on SQL Server.
- (18918) Promotion Optimization also requires an additional file (**CustomProcStep.class**) that is not included with the Demantra Spectrum installer. This is available from Demantra Customer Support. When you get this file, place it in the directory **…\WEB-INF\classes\com\demantra\workflow\step**
- (18677) The Promotion Optimization engine uses levels in the Demantra Spectrum forecast tree, and uses their names rather than their internal identifiers. This means that if you change the name of a level, you must rebuild the forecast tree to make sure that Promotion Optimization can find the level (because the forecast tree is not automatically synchronized with the level definitions).

  If you are not using Promotion Optimization, you would need to rebuild the forecast tree only if you removed a level or added a new level that you wanted to include in the forecast tree.

Security and User Management

- (19178) If you log a user out via **userManagement.jsp**, this user can still keep working. No message is given, but changes to data are not saved. To work around this, use **userManagement.jsp** only to end user sessions that are truly hung.
- (18919) Menus and toolbar options are available even if you have disabled the corresponding menu items through the Collaborator Workbench Administrator.
- (18682) Menus in Collaborator Workbench are not affected by permissions set through the Collaborator Workbench Administrator.
- (18450): Users cannot act on notes according to their permissions.

- (18447) Permissions are not applied to note attachments.
- (17890) In the menu security page, when you disable and later re-enable an inheritance, the system should automatically restore the inherited state. It does not do so.

Series, Client Expressions

This section lists defects related to all types of client expressions, including edit-lock expressions, for example.

- (18869) For a client expression, a time-shifted expression that refers to another series (within the square brackets) is not always computed correctly.
- (17998) In some situations, the **GetWorksheetLevelNumber** function does not return the correct value.
- (16566) The function **FSum** does not work in the Web products for values smaller than 1.
- (16483) Before an edit-lock expression takes effect, it is necessary to save the worksheet data and rerun the worksheet. The edit-lock expression *should* prevent editing as soon as the given condition occurs.
- (14715) The **Date()** function does not yet work in the Web client or in Collaborator Workbench.

Series, Special Configurations

- (16664) A series that is aggregated by promotion does not work properly with the **EXTRA WHERE** option.
- (16371) If a series is aggregated by promotion, that series should be not editable for any record where the item, location, and time bucket does not have a promotion. The series is editable, however, where it should not be.
- (14203) Sometimes you may get an update error on a dropdown matrix series that is linked to a level. The error occurs when you select the option None in the dropdown menu. The error appears in DB_EXCEPTION_LOG as follows:

```
ORA-01407: cannot update
("TAMI61"."MDP_MATRIX"."INFLUENCE_GROUP_LEVEL_ID") to NULL
Error in PROCEDURE MANUALS_INS line 289
dynamic_ddl( 'UPDATE mdp_matrix
   SET influence_group_level_id=NULL, last_update_date=SYSDATE
   WHERE ( item_id, location_id ) IN ( SELECT item_id,location_id FROM
manuals_population )')
```

- (8718) If a series uses **EXTRA WHERE** and **EXTRA FROM**, data changes to it are not saved correctly.

Settlement Management and UPGRADE_TO_DSM

Also see “Worksheets (Web Client)” on page 58.

- (19283) If you start to create a check request but then cancel the link, the check request is not canceled.
- (19261) On SQL Server, the upgrade_to_dsm procedure fails to create the Invoice Bill to level.
- (19259) The **Check Request** screen is not displayed when it should be.
- (19191) On SQL Server, the POP_ALL_MATCH_PROPOSAL and POP_OI_MATCH_PROPOSAL procedures do not work.
- (19024) The POP_OI_MATCH_PROPOSAL and POP_ALL_MATCH_PROPOSAL procedures fail if you run them more than once on new settlements.
- (18652) The **upgrade_to_dsm** procedure deletes any GL codes, invoices, and settlements that you had loaded into the database.
- (18393) If a user has been filtered, that user will encounter errors when trying to use the worksheet wizard (in particular, the levels screen).
- (18360) If a user has been filtered by promotion and that user opens the Settlement Account Summaries worksheet, the worksheet returns without data. Server-side errors occur.
- If you use the **upgrade_to_dsm** procedure, you will need to complete the following steps, in any order, after running the procedure:
  - Use a database tool to examine the **WF_SCHEMAS** table. Make sure that the **SCHEMA_DATA** column uses the parameter **Minute**, rather than **MINUTE**.
  - Look in the **queries** table and find the worksheet ID of the **Proposed Match** worksheet. Then in the **Settlement** table, make sure that the **related_ws** column includes this worksheet ID, for all rows.
  - (18536) In the Business Modeler, check the configuration of the following DSM methods:

    Unlink
    New Settlement
    View Settlement
    Edit Settlement

    Make sure that the **Related WS** attribute is used as an input argument for each of these methods.
  - Make sure that the method **Edit Settlement** uses the **Status** attribute as an argument. Do not make any other changes to the **Edit Settlement** method, which is used internally by the other settlement methods.
  - (19016) For the following series, add a display format of type date:

    Customer Check Date

Customer Invoice Date
Posted Date
Supplier Check Date
Supplier Invoice Date

- (19016) For the following series, change the summary line function from **SUM** to **Total**. You may need to go into the database to make this change:

  Approved Non Trade
  Approved Trade
  Unapproved Trade
  Total Outstanding Non Trade
  Total Outstanding Trade
  Unapproved Non Trade
  Unapproved Trade
  Unresolved Non Trade
  Unresolved Trade

- (19016) For the following series, reconfigure the summary line as a client expression with a null value:

  Customer Check #
  Customer Invoice #
  Supplier Check #
  Supplier Invoice #
  Owner
  GL/Code
  Linked Promo ID
  Matched Event
  Settlement Status
  Settlement Type
  Settlement Account ID
  Settlement Invoice ID
  Settlement #

- (19019) Modify the DSM workflow schemas to use the actual numeric IDs of the integration profiles to which they refer. You will need to make this change in the database, because the error prevents you from editing these schemas in the Workflow Editor. The integration profiles are defined in the **transfer_query** table, and the workflow schemas are defined in the **WF_SCHEMAS** table.

- (18527) Using the worksheet editor, correct the date range of the **Proposed Event Matches** worksheet.

- (17903) Modify the DSM level methods (Deny, Ownership, Link, and Unlink) to automatically refresh the worksheet.

- (19334) On SQL Server, correct the dropdown list definition for the Unapproved Event Product series. It should use different values for the description and code columns (P1_DESC and t_ep_p1_EP_ID, respectively).

- (19020) Ignore the following integration interfaces, which are incomplete:

CHECK Request Integration INTERFACE
Claim Integration INTERFACE
Deduction Integration INTERFACE
OFF-Invoice Integration INTERFACE
Split Claim Integration INTERFACE
Split Deduction Integration INTERFACE

- (18567) The Check Request field in the Link Screen should be enabled only in Claim Settlements. In the current release, the Check Request field is also enabled on O/I settlements.
- (18565) In the Approved Link screen, Date Series does not present the date on which the promotion was linked to the settlement.
- (18546) The audit trail does not record the action of approving a settlement. The status change of the settlement is not recorded.
- (17892) In some cases, when you select an unmatched settlement, the only method available is Unlink.

Simulation

- (16502) If one user cancels a simulation in the Simulation Queue window, and another user starts a simulation at the same time, then Collaborator Workbench and the Web client hang for the first user.

Update (Saving Data in a Worksheet)

- (19085) For a series that uses a proportion-calculation series, **manual_ins** does not update values for records where the proportion-calculation series is missing.
- (19010) If you uncheck the advanced selection options in a worksheet (**Include combinations that exist only in Promotion**, for example) and you edit data in the worksheet, the wrong population might be updated.
- (18963) If you create a series that is aggregated by an unlinked level, and you edit data for that series, the updates are not done and an error occurs on the server.
- (18634) Demantra Spectrum does not correctly save data on a series on level attribute of string type.
- (18553) In cases where specific proportions are not available, the update mechanism should use the stored rolling average proportions of each combination when determining how to split. Instead, the split to the lowest levels is currently done equally, regardless of the glob_prop of the combinations.
- (18518) Update does not work on missing rows, for a series whose server expression uses the **#UNIT#** token.
- (18476) Update-lock expressions do not work when they are defined with string- or date-type series.

- (18148) If your worksheet is configured to **Include combinations that exist only in Promotion** and if you edit a **sales_data** series for such combinations, your changes are not saved because the update mechanism does not insert records into **sales_data**.
- (16393) Manual updates fail if the worksheet is displayed with units other than the basic unit.
- (15151) If a worksheet uses an aggregated time scale (larger than the time bucket), do not edit series in the overlapping row (which combines history and forecast). If you do, you will have incorrect values.
- (14894) If a series is aggregated by a promotion level, it is not updated correctly.
- (14714) If a worksheet includes a level from inputs and updatable series, and you update the series, Demantra updates the wrong data.
- (14593) When you copy and paste a value in the worksheet and then click **Data > Update**, the worksheet does not actually save the data.
- (13604) When a worksheet is in crosstab mode (level on axis), Demantra Spectrum does not save data for a matrix dropdown series.

Workflow

- (14109) A manual task sent with a due date is not escalated. The alert, however, does work.

Worksheets (Web Client)

This section lists issues that may occur while running worksheets in Demand Planner Web, Promotions Effectiveness, or Collaborator Workbench.

- (19361) Incremental loading does not work with worksheets that include time levels.
- (19067) Editable promotion series (of promotion dropdown type) become uneditable when a promotion type level is selected in the worksheet.
- (19007) If you use **Open With** to open a worksheet that contains an embedded worksheet, the embedded worksheet is not filtered correctly.
- (18102) When you edit data in an embedded worksheet, be sure to save the data before making a different selection in the parent worksheet. Otherwise, your change is not saved.
- (18759) If a worksheet view contains hidden levels, if you click on a row in the table, the following problems occur:
  - All subtabs are empty.
  - The graph does not display data.
  - Simulation does not work.

    - Level methods does not work correctly.
- (18557) If you manually refresh a cached worksheet that uses a *relative* time filter, leave it open for some time, and then rerun it, you do not get the correct data.
- (18544) In the worksheet designer, if you place the time icon on page item, the worksheet returns only one date instead of all expected dates.
- (18211) You may have memory issues when using Demantra Spectrum worksheets via Citrix.
- (18058) All users of a worksheet see the worksheet cache icon, even if they do not own the worksheet. This suggests that this worksheet is cached for them, even though it is not.
- (15598) The time zone influences dates in Demantra Spectrum. Because dates are stored as midnight (for example 9/1/2003 00:00:00), when a user from the other time zones log in, the dates displayed for that user shift back by the relevant amount of time, so the date above becomes 8/31/2003 23:00:00, and that shows up as 8/31/2003 in the truncated form. This issue influences all time-related functions in the worksheet.
- (15170) When you sort a worksheet, the data is not exported or printed correctly.
- (15022) It is not possible to sort the series if you have hidden levels in the Layout Designer.
- (14841) When a worksheet is in crosstab format, any dropdown series are displayed with their internal numbers (codes) rather than the corresponding display fields (descriptions).
- (14571) The find functionality in the filter does find the member and highlight it, but does not bring it into view. You have to scroll and find the highlighted member.
- (14203) For a matrix dropdown series that is linked to a level, an error occurs if you select the option **None** in the dropdown.
- (14191) The Copy option on Clipboard is missing.
- (13315) After you save a worksheet definition, if you open the worksheet via **Edit>Definitions>Aggregation Levels**, the changes do not appear. However, the changes are present, and when you rerun the worksheet, they do affect the results as they should.
- (13147) When you run a large worksheet, sometimes Demand Planner Web runs out of memory and hangs, never returning with the results.
- (942) The advanced selection option in a worksheet does not work correctly unless the worksheet includes a promotion level. To access this option, click **Worksheet > Aggregation Levels** and then click the **Advanced** button. If you click both check boxes, the worksheet should display all combinations,

including ones that do not have any sales records. Such combinations are rare but may be imported or created via Member Management in the desktop. There is no way to see combinations that do not have sales records.

To work around this, use Member Management, select the combination of interest, and click **Insert Zero Records**. Then the combination will be visible.

- Demantra Spectrum provides an option to open a worksheet directly from a browser. To do so, you need to know your numeric user ID, which is not visible in the user interface. You can, however, find this in the Demantra Spectrum database. The URL is as follows:

  http://*server name/virtual directory***/portal/partnerLogin.jsp?userId=***numeric_user_ID***&password=***password***&queryId=***worksheet_ID*

  In a later release, you will be able to supply the username instead. This information will then be in the *Demand Planner Web User's Guide* and other user guides.