Applications

DEMANTRA TPMO USER GUIDE

Application Version 1.0

Platform Version 7.0, 7.0.1, or 7.0.2

CREATE DEMAND. MANAGE DEMAND. FULFILL DEMAND.

Demantra TPMO User Guide
Application version: 1.0
For use with platform version: 7.0, 7.0.1, or 7.0.2
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Demantra TPMO User Guide

Contents

Part I Introduction and Basics

1 TPM and PMO Introductions

This chapter introduces the Trade Promotion Management (TPM) and Promotion Modeling and Optimization (PMO) applications.

Overview

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 considers sales, point of sale (POS), and syndicated data to provide advanced pre and post promotion analysis:

- Historical event evaluation, including detailed analysis of lift components, taking into account both direct and indirect effects
- Base volume forecast by item over time based on past history
- 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 also recognizes that every manufacturer manages accounts and trade promotions a bit differently. Demantra's applications are highly configurable, allowing Demantra consultants and trained users to tailor them to the customer's needs, both today and as these needs evolve in the future.

Data Hierarchy

The TPM and PMO applications assume that the products and locations are organized into certain hierarchies, each of which you can navigate within the applications. Depending on how your application was configured, you may use other terminology for these hierarchies. (For more information on how Demantra Spectrum uses hierarchies, see Chapter 3, “TPMO Concepts” on page 17.)

Product Hierarchies

The TPM and PMO applications assume that the products are organized into the following hierarchies:

- One hierarchy organizes products into categories, which consist of segments, which consist of brands, which consist of SKUs.
- Another hierarchy organizes products into promotion groups, groups of products that are promoted together. Each promotion group consists of a set of SKUs.
- Another hierarchy (less often used) organizes products into product lines, which consist of product families, which consist of product groups, which consists of SKUs.

Location Hierarchies

The TPM and PMO applications assume that the locations are organized into the following hierarchies:

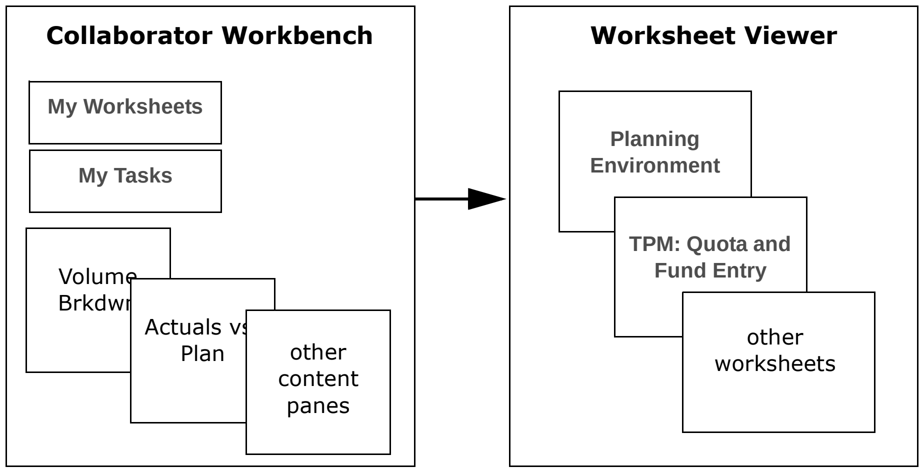
- One hierarchy consists of bill-to locations, which consist of specific ship-to locations.
- One hierarchy consists of retailers, which consist of specific ship-to locations.
- One hierarchy consists of companies, which consists of divisions, which consist of sales areas, which consist of regions. In turn, regions consist of districts, which consist of territories.

The lowest location level is a combination of ship-to and territory.

Dashboard: Collaborator Workbench

Demantra's Collaborator Workbench is the starting point for Demantra's TPM and PMO applications. You log into the application and immediately have access to a number of key performance indicators (KPIs), displayed inside *content panes*. TPMO provides several out-of-the-box content panes, and you can add others.

From Collaborator Workbench, you can launch worksheets and review tasks.



Each *worksheet* is a working environment designed to support specific business processes. You can open worksheets from within Collaborator Workbench, the Worksheet Viewer, or worksheets that are currently open.

TPM Worksheets

TPM includes the following worksheets:

- **Planning Environment**—the entry point to both historical and planned event analysis. Event planning consists of creating and managing a calendar of promotional events, and understanding their impact on sales, promotion spending, and profitability, as well as their correlation with sales quotas. The **Planning Environment** provides all this critical information in one place.
- **TPM: Quota and Fund Entry**—allows headquarters to manage funds, including fund rates and fixed funds as well as sales quotas.
- **TPM: Quota and Fund View**—a read-only version of the **TPM: Quota and Fund Entry** worksheet. It allows you to view authorized funds against your sales quota.
- **Volume Tracking**—central location where product, territory, and account volumes are forecasted and monitored to ultimately feed volume requirements to operations. Fund planning already covered is integrated with volume planning, because forecast volumes drive budgets in live accrual environments and drive spending for case rate allowances and other variable spending deals.

PMO Worksheets

PMO includes the following worksheets:

- **Planning Environment** (as above)
- **PMO: Optimization Comparison**—provides the capability to simultaneously view and compare the results of a promotion before and after running optimization. After comparing, you can accept, reject, or reoptimize the promotion. Once satisfied with the results, you can add them to their current plan simply by changing the status to **Planned.**
- **PMO: Promotion Comparison**—helps you compare and evaluate multiple promotions, so that you can determine how best to spend trade dollars.
- **PMO: Promotion Evaluation**—provides a detailed post-promotional analysis of each individual promotion. (i.e. compare forecast to actual performance). Here, you can view the breakdown of each event with respect to the sales dollars and profit generated for the manufacturer.
- **PMO: Promotion Evaluation - Detail**—provides further detail about the impact of the promotion. It shows the lift decomposition in much more detail, showing the actual cannibalization for the promoted item as well as the impact it had on other items within a user's franchise.
- **PMO: Scenario Evaluation**—provides an overview of historical promotions by territory, retailer, category and promotion group, allowing for a detailed analysis of how all events within a category performed to plan.

2 Logging On and Getting Started

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

Initial Logon and Download

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

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

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

   For example:

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

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

3. Type your name and password and click **Login**.

   Demantra Spectrum prompts you to install JRE.

4. When you are prompted to install Sun JRE 1.4.2_10, do so. Choose the **Typical** installation and accept all the default values, unless otherwise advised by your system administrators.

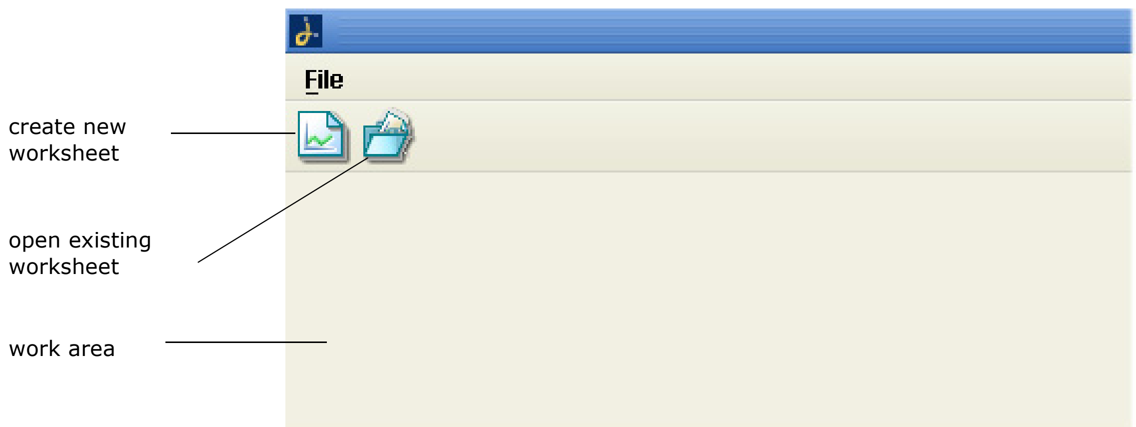
   Note Demantra Spectrum uses Sun JRE 1.4.2_10. If you are prompted to install a later version of JRE, do not do so.

   To prevent Java from searching for updates, open the Java control panel. On the **Update** tab, make sure to deselect the check box **Check for Updates Automatically**.

   Next, Demantra Spectrum displays a dialog box that asks if you want to trust the signed application distributed by Demantra. The dialog box is slightly different depending on your configuration.

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

   After the initial configuration is completed, Demantra Spectrum displays a new browser window. The page contains a menu bar, a toolbar, and a workspace that is initially empty.



6. Click **File > Open**.
7. Click a worksheet in the list and then click **Open**.

Now the work area displays a worksheet, and the menu bar and toolbar have many more options.

See also

"Viewing Data" on page 25

Logging Onto Demantra Spectrum

If you have already performed the initial setup (see “Initial Logon and Download” on page 7), then log on as follows.

To log onto Demantra Spectrum

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

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

   For example:

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

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

3. Type your name and password and click **Login**.

Tutorial: Getting Acquainted with Worksheets

To view and edit data, you work within an environment called a *worksheet*. Each worksheet is a working environment designed to support specific business processes. The worksheets in your solution are unique and are not documented here specifically. However, all worksheets share certain common characteristics and behavior. This exercise is meant to help you get acquainted with any worksheet.

1. Click **File > Open**. Or click the Open button.
2. Click a worksheet in the list and then click **Open**.

   Demantra Spectrum now displays the worksheet.

3. Scan the worksheet and identify each element of it, using “Elements of a Worksheet” on page 10 as a guide.
4. Then select the data to display:
   - If the worksheet uses a Members Browser, click the magnifying glasses to expand the hierarchy and then click the leaf node that you want to view.
   - If the worksheet has selection lists, select from the left list first, then the next list to its right, and so on.

   The rest of the worksheet now shows data relevant to this selection. Notice that the focus has changed to the current selection in each tab or tile of the worksheet.

   Some areas of the worksheet might be at a lower level than your selection. For example, you may have selected a Brand, while a graph shows sales for a given SKU. Because you have not yet selected a SKU, that graph arbitrarily chose a SKU within that brand.

5. If the worksheet includes any table in crosstab format, click a row or column that corresponds to the elements that are shown in that breakout.

   For example, if a worksheet tables shows SKUs as rows in the table, choose a SKU by selecting a row.

   The rest of the worksheet now shows data for this specific selection. This includes any embedded worksheets as well as any other subtabs, if the subtabs are synchronized; see “Controlling Subtab Synchronization” on page 13.

6. Still within a worksheet table, use the keyboard to move from element to element. Notice that in this case, the subtabs are not automatically refreshed, for performance reasons; this is true even if the subtab synchronization is on.

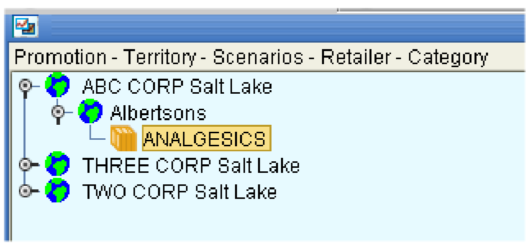
Elements of a Worksheet

Any worksheet contains some or all of the following possible elements:

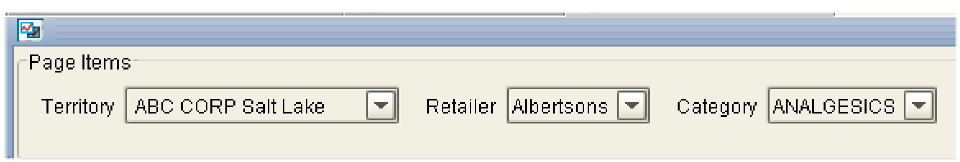
Selector

Most worksheets contain an area that you use to select the data to display. This area has one of the following forms:

- Members Browser:



- Selection lists:



Tables

A worksheet table displays data for the current selection. The following shows an example:

Private Label LF Butter - BJ Store # 0006							
Time	Demand	Final Plan	Pseudo	Simulation	Sales Forecast	Sales Fcst Bias	Stat Frcst (Y/N)
04/08/2002	1,258,700				1,240,202	-18,498	Do Forecast
07/08/2002	1,232,800				1,161,719	-71,081	Do Forecast
10/07/2002	1,326,200				1,057,580	-268,620	Do Forecast
01/06/2003	488,500				903,675	415,175	Do Forecast
04/07/2003		1,193,227			1,193,227		Do Forecast
07/07/2003		1,123,295			1,123,295		Do Forecast
10/06/2003		1,040,942			1,040,942		Do Forecast
01/05/2004		820,737			820,737		Do Forecast
04/05/2004		280,121			280,121		Do Forecast
Summary	4,306,200	4,458,322			8,821,497	14,244	

Some tables display a breakdown by item, location, or other organizational level. The following shows an example:

Time	SKU	Sales	Ttl Evt Vol Act	Final Forecast
11/15/2004	2345623489880	1,346	10	1,521
	2345623489883	1,716	0	2,046
	2345623489877	1,838	617	1,330
	Summary	4,901	628	4,896
12/13/2004	2345623489880	5,808	3,950	2,219
	2345623489883	1,559	0	1,690
	2345623489877	1,172	0	1,128
	Summary	8,538	3,950	5,037
01/10/2005	2345623489880	1,402	12	1,890
	2345623489883	1,628	0	1,443
	2345623489877	1,340	169	1,251
	Summary	4,370	180	4,585

In this example, each SKU in the worksheet is shown side-by-side with the others, inside the table. This table is in crosstab format. Many other variations are possible. For example, the SKUs could be shown across the top of the table instead.

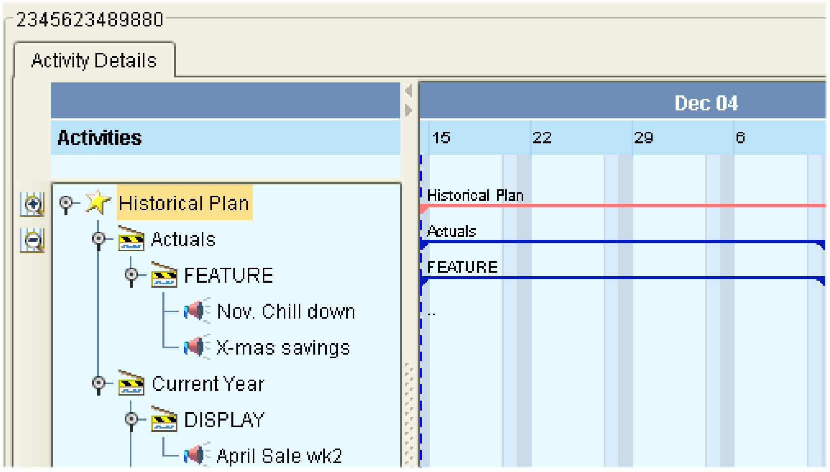
Graphs

A worksheet graph displays data for the current selection. By default, the horizontal axis shows time, and the vertical axis shows one or more series.

Note In order to include the graph, you must have a license for either Demand Planner Web or Promotions Effectiveness.

Activity Details **Subtab**

The **Activity Details** subtab displays promotions and the promotion hierarchy related to the current selection.

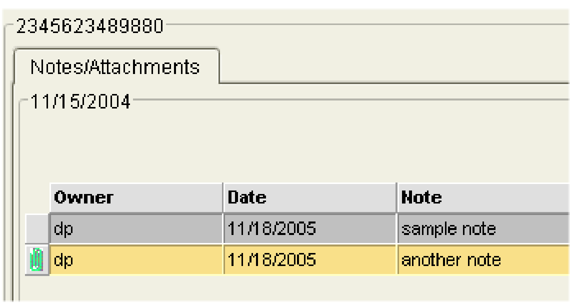


If this is included in your worksheet, it may appear in the lower right. If your worksheet contains multiple tiles, however, it can appear anywhere on the screen.

This subtab is available only if you have a license to Promotions Effectiveness.

Notes/Attachments **Subtab**

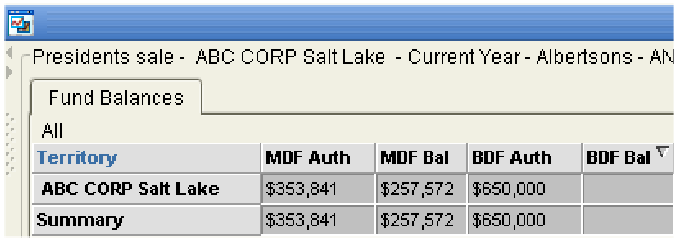
The **Notes/Attachments** subtab displays notes and attachments related to the current selection:



If this is included in your worksheet, it may appear in the lower right. If your worksheet contains multiple tiles, however, it can appear anywhere on the screen.

Embedded Worksheets (Subtab Worksheets)

A worksheet can included embedded worksheets, which can include any of the elements listed here. These may appear in the lower right. If your worksheet contains multiple tiles, however, these embedded worksheets can appear anywhere on the screen. Each embedded worksheet is displayed within a subtab, as follows:



Controlling Subtab Synchronization

The subtabs of a worksheet may or may not be synchronized with the rest of the worksheet. A worksheet runs faster if synchronization is off. On the other hand, if you are creating or modifying promotions, you might find it less confusing to keep synchronization switched on so that you can immediately see your changes.

To control the synchronization, do one of the following:

- Click one of the following toggle buttons in the toolbar.

   Automatically synchronize the subtabs with the rest of worksheet

   Synchronize on demand

- Select **Options > Synchronize On Demand** or **Synchronize Automatically**.

User Access

Depending on the implementation and on your access, you might not see the same data as other users of the system. Your access can be different from that of another user in many ways:

- The data you see might be filtered. For example, if you are an account manager, you might not be able to see accounts that are not yours.
- You might not see the same aggregation levels. And you should be able to see only those units of measure that make sense for the levels you see.
- You can see a given promotion only if you have permission to see all item-location combinations with which the promotion is associated.
- You might not see the same series.
- You could belong to different collaboration groups. See the *Collaborator Workbench User's Guide*.

- You might not have access to all menus listed in the documentation.
- You might have additional menu items, created by your implementors. These menu items would be on the right-click menu.
- You can use only worksheets that are public or that you defined. Only the owner of a worksheet can change its definition.

You should also be aware that an individual worksheet might have additional filters applied to it. You can see those filters at any time.

Logging Off Demantra Spectrum

To exit Demantra Spectrum

- Close the browser window.

Any other open browsers are not affected.

Ending a Hung Session

If your session hangs due to network or other problems, you will not be able to log in again until the session times out. Alternatively, Demantra Spectrum provides a tool that you can use to end that session.

If your permission level is lower than **System Manager**, your own session is the only session you can see.

To end a hung session

1. Browse to the following case-sensitive URL:

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

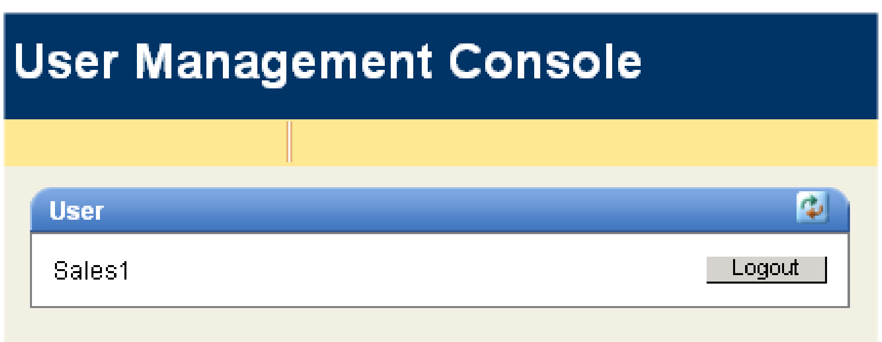
   For example:

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

   A login page appears.

2. Type your username and password and then click **Log on**.

   Demantra Spectrum displays the following screen:



3. Click **Logout** in the row corresponding to your user ID.

Changing Your Password

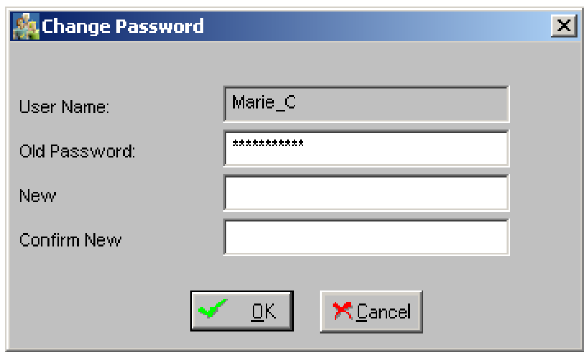
Any user can log into the Business Modeler and change his or her own password. If your permission level is lower than **System Manager**, your password is the only information you can access.

To change your password

1. Log into the Business Modeler. If you do not have access to this, contact your Demantra Spectrum system administrator.

2. Click **Security > Change Password**. Or click the Change Password button.

   The Business Modeler displays the **Change Password** screen:



3. Type your current password in the **Old Password** field.
4. Type your new password in the **New** and **Confirm New** fields.
5. Click **OK**.

3 TPMO Concepts

This chapter introduces key concepts in the Demantra Spectrum platform and in TPMO.

Getting Acquainted with Worksheets

To view and edit data, you work within an environment called a *worksheet*. Each worksheet is a working environment designed to support specific business processes. However, all worksheets share certain common characteristics and behavior. This exercise is meant to help you get acquainted with any worksheet.

1. Click **File > Open**. Or click the Open button.
2. Click a worksheet in the list and then click **Open**.

   Demantra Spectrum now displays the worksheet.

3. Scan the worksheet and identify each element of it, using “Elements of a Worksheet” on page 18 as a guide. Make sure that you know what each of the following elements looks like:
   - Members Browser
   - Selection lists
   - Table
   - Graph
   - Embedded worksheets (subtab worksheets)
4. Then select the data to display:
   - If the worksheet uses a Members Browser, click the magnifying glasses to expand the hierarchy and then click the leaf node that you want to view.
   - If the worksheet has selection lists, select from the left list first, then the next list to its right, and so on.

   The rest of the worksheet now shows data relevant to this selection. Notice that the focus has changed to the current selection in each tab or tile of the worksheet.

   Some areas of the worksheet might be at a lower level than your selection. For example, you may have selected a Brand, while a graph shows sales for a given

SKU. Because you have not yet selected a SKU, that graph arbitrarily chose a SKU within that brand.

5. If the worksheet includes any table in crosstab format, click a row or column that corresponds to the elements that are shown in that breakout.

   For example, if a worksheet tables shows SKUs as rows in the table, choose a SKU by selecting a row.

   The rest of the worksheet now shows data for this specific selection. This includes any embedded worksheets as well as any other subtabs, if the subtabs are synchronized; see “Controlling Subtab Synchronization” on page 19.

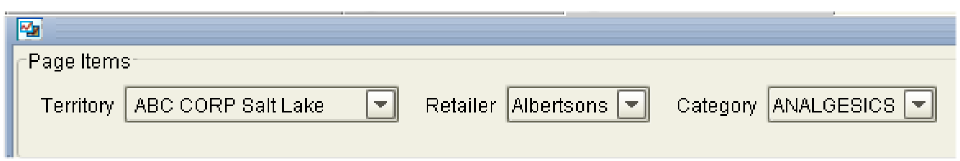
6. Still within a worksheet table, use the keyboard to move from element to element. Notice that in this case, the subtabs are not automatically refreshed, for performance reasons; this is true even if the subtab synchronization is on.

Elements of a Worksheet

Any worksheet contains some or all of the following possible elements:

Selector

Most worksheets contain an area that you use to select the data to display. This area usually the following form:



Tables

A worksheet table displays data for the current selection, for example:

T1-World Brands Comb - Albertsons - ANALGESICS - EXEDRA 100 - Sandbox

Promotion	Ttl Evt $	Incr Evt $	Mfg Profit	Incr Mfg Prft	Rtl Prft	Incr Rtl Prft
Test Opti Scen	$527,686	$462,021	$92,503	$59,060	$63,241	$38,960
Test Proj	$232,973	$206,148	$108,654	$94,992	-$232,973	-$242,892
Summary						

In this example, the promotions are shown side-by-side within the table. This table is said to be in crosstab format.

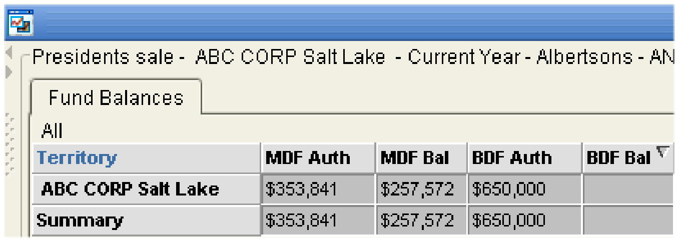
Graphs

A worksheet graph displays data for the current selection. By default, the horizontal axis shows time, and the vertical axis shows one or more series.

Note In order to view the graph, you must have a license for either Demand Planner Web or Promotions Effectiveness.

Embedded Worksheets (Subtab Worksheets)

A worksheet can included embedded worksheets, each of which is displayed within a subtab, as follows:



Controlling Subtab Synchronization

The embedded worksheets of a worksheet may or may not be synchronized with the rest of the worksheet. A worksheet runs faster if synchronization is off. On the other hand, if you are creating or modifying promotions, you might find it less confusing to keep synchronization switched on so that you can immediately see your changes.

To control the synchronization, do one of the following:

- Click one of the following toggle buttons in the toolbar.

   Automatically synchronize the subtabs with the rest of worksheet

   Synchronize on demand

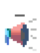
- Select **Options > Synchronize On Demand** or **Synchronize Automatically**.

Levels (Segmentation)

A level lets you aggregate or group data in a worksheet. Demantra Spectrum uses icons to indicate the type of level:

 *Item levels* group and aggregate data according to characteristics of the items you sell. For example, TPMO item levels include brand and category.

 *Location levels* group and aggregate data according to the locations where they are sold. For example, TPMO location levels include retailer, territory, and so on.

 *Promotion levels* group and aggregate data by promotions.

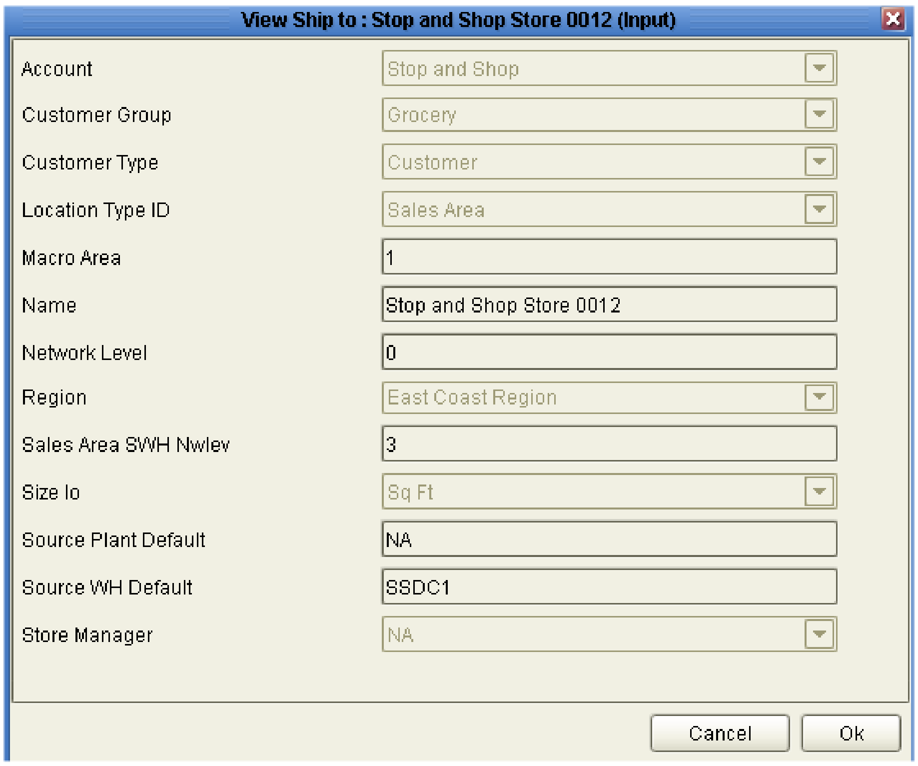
TPMO includes a flexible set of levels and Demantra consultants can redefine them or add others.

Members

In generic terminology, the word *member* refers to a unit within a level. For example, Albertsons is a *member* of the retailer level.

Level Attributes

A level can have attributes. For example, a Ship To member might have the following attributes:



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

The other attributes (such as Unit Cost) do not represent levels in the system but contain information used for reporting and other purposes.

Combinations

The combination is a central concept in Demantra Spectrum; it is a specific location combined with a specific item. Combinations represent real things being sold at real places. It is important to understand that Demantra Spectrum contains only the combinations that have data. For example, an account might consist of 100 stores, and a brand might consist of 100 items. This implies 10,000 possible combinations. However, Demantra Spectrum contains information only for those combinations that actually have sales data (or that have been manually created by users, for forecasting purposes).

Series (Measures)

Each worksheet or content pane shows series data associated with the members that you have currently selected. These series were created by your implementors, for your organization's needs. A worksheet displays the series data in a table, or in a graph, or both; a content pane displays *either* a table or a graph. The following shows an example of a worksheet table:

Private Label LF Butter - BJ Store # 0006

Time	Demand	Final Plan	Pseudo	Simulation	Sales Forecast	Sales Fcst Bias	Stat Frcst (Y/N)
04/08/2002	1,258,700				1,240,202	-18,498	Do Forecast
07/08/2002	1,232,800				1,161,719	-71,081	Do Forecast
10/07/2002	1,326,200				1,057,580	-268,620	Do Forecast
01/06/2003	488,500				903,675	415,175	Do Forecast
04/07/2003		1,193,227			1,193,227		Do Forecast
07/07/2003		1,123,295			1,123,295		Do Forecast
10/06/2003		1,040,942			1,040,942		Do Forecast
01/05/2004		820,737			820,737		Do Forecast
04/05/2004		280,121			280,121		Do Forecast
Summary	4,306,200	4,458,322			8,821,497	14,244	

The example here shows series at the lowest level, but you can view data for any given series at any aggregation level.

As you can see from this example, there are many possible variations of series:

- Some series are editable (see **Stat Frcst**), some are editable only for specific dates (see **Pseudo**), and some are not editable at all. Generally, editable series are used as input to other series.
- Some series are shown in different colors, depending on the data values. For example, **Sales Fcst Bias** is displayed in red for any values less than zero.
- Some series are calculated from other series.
- Some are generated by the Analytical Engine, if that is relevant in your Demantra Spectrum solution.
- Most series have time-varying values for each combination, but there are other kinds of series as well (discussed below). For example, the series **Stat Frcst** specifies whether a combination should be used in forecasting or not. As you can see, this series has the same value for all time buckets for a given combination.
- Most series have numeric values, but some have string or date values. For some series, you choose a value from a dropdown list.

Kinds of Series

Demantra Spectrum supports the following kinds of series:

- *Sales series* contain time-dependent set of data for item-location combinations. That is, each data point in the series corresponds to a given item-location combination at a given point in time. This type of series is the most common type by far.
- *Combination series* (also called matrix series) store time-independent data for each item-location combination. That is, each data point in the series corresponds to a given item-location combination. You use combination series to store and maintain information about item-location combinations, mainly flags for the Analytical Engine to use.
- *Promotion series* store time-dependent data associated with each promotion, at each item-location combination.
- *Level series* store data associated with a specific level. Each data point in the series corresponds to a given member of that level.

Series and Summary Rows

Each series has been configured to be summarized in a specific way, which you can see in the summary row of the table. The table has at least one summary row; depending on the layout, it may also include subtotal rows. The following shows an example:

Product Family	Account	Time	Price $	Revenue $	Discount	Approved
Gourmet	Stop and Shop	03/10/2003	$10.00	$6,963,948	9.00%	☐
		09/08/2003	$10.00	$3,190,742	0.00%	☐
		03/08/2004	$10.00	$3,141,407	0.00%	☐
		Summary	$10.00	$13,296,097	3.00%	3
	Summary		$10.00	$13,296,097	3.00%	1
Regular	Stop and Shop	09/08/2003	$10.00	$52,827,440	0.00%	☐
		03/10/2003	$9.14	$47,052,748	9.00%	☐
		03/08/2004	$10.00	$13,265,270	0.00%	☐
		Summary	$9.71	$113,145,464	3.00%	3
	McKessen	03/10/2003	$10.00	$769,117	0.00%	☑
		09/08/2003	$10.00	$1,168,671	0.00%	☐
		03/08/2004	$10.00	$308,523	0.00%	☐
		Summary	$10.00	$2,246,312	0.00%	3
	Summary		$9.86	$115,391,776	1.50%	2
Slim	Stop and Shop	03/10/2003	$10.00	$22,640,676	9.00%	☐
		09/08/2003	$10.00	$21,201,430	0.00%	☐
		03/08/2004	$10.00	$7,785,908	0.00%	☐
		Summary	$10.00	$51,628,012	3.00%	3
	Summary		$10.00	$51,628,012	3.00%	1
Summary			$9.93	$180,315,888	2.25%	4

As you can see, Demantra Spectrum provides different summarizing options. In this example:

- Price and Discount are summarized by averaging.

- Revenue is summarized by adding all the values.
- The Approved series is summarized by counting the number of approvals.

More complex options are also available. A given series can be summarized in different ways within a single table. Consult your implementors for details on how your series are summarized.

Content Panes

You work primarily within the Worksheet Viewer, but you can display read-only, summarized data within Collaborator Workbench as well. To do so, you use content panes. A content pane displays a graphical view of data associated with a worksheet, to provide you with current, at-a-glance information that meets your needs.

A content pane has many of the same features as a worksheet.

4 Working with Data

This chapter describes the basics of working with Demantra Spectrum data: how to edit data, add notes and attachments, print, exchange data with outside tools, and so on. It includes the following sections:

Viewing Data

To view and edit data, you work within an environment called a *worksheet*, especially within the worksheet table. Each worksheet shows specific data, organized in a specific way.

To view your data

1. Click **File > Open**. Or click the Open button.
2. Click a worksheet in the list and then click **Open**.

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

3. If the worksheet does not show data immediately, click **Data** > **Rerun**. Or click the Run button.

To load all data

When you first run a worksheet, Demantra Spectrum does not load all the data. Instead, it loads data for the first item-location combination in the worksheet. When you switch to another combination, Demantra Spectrum loads data for that combination. Demantra Spectrum does this so that you can see some data without having to wait for all the combinations to be loaded. *In some cases*, you may want to load all the combinations immediately; do this only if you are sure it will not slow your system down.

To load all the data, click the green arrow in the toolbar.

If the toolbar does not display this arrow, that means all the data has already been loaded.

Editing Data

You can usually edit data in a worksheet, although not all series are editable. Note that within a given worksheet, if some of the tabs or windows show data at a higher aggregation level, the data is not editable in those tabs or windows.

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

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

If you use these characters, unexpected results may occur.

To change a data value manually

1. Select an editable data cell (white).

   The cell appears contained in a box.

2. Edit the value as needed.

To update multiple cells

1. In the table, select a range of cells.
2. Right-click the selection and then select **Edit Cells**.

   The **Edit Cells** dialog box appears.

3. In the dialog box, type a new value and then click **OK**.

To undo

Do one of the following:

- Click **Edit** > **Undo**.
- Click **Data** > **Reset Manual Changes**. This option restores the worksheet data to the state in which you last saved it.

To redo an action

- Click **Edit** > **Redo**.

See also

"Copying and Pasting Data" on page 29
"Saving and Viewing Changes" on page 27

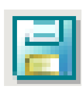
Saving and Viewing Changes

Apart from minor adjustments to the worksheet layout, the changes you make are not saved automatically.

Saving Changes

You save changes to data separately from changes to the worksheet definition:

- To save changes that you have made to the data in the worksheet, including changes to notes, click **Data > Save Data**. Or click the Save Data button.



- To save changes that you have made to the worksheet definition, click **File > Save Worksheet**. Or click the Save Worksheet button.
    - If you own the worksheet, this option saves the basic worksheet definition and its initial layout..
    - If you do not own the worksheet, this option saves only your own layout of the worksheet.

  See "Worksheet Definition, Layout, and Local Adjustments" on page 49.

Controlling the Recalc Option

Usually at least some of the read-only series are computed by means of a local expression. By default, Demantra Spectrum recalculates all local series expressions automatically. In some cases, you may want to switch off this automatic recalculation:

To switch the Recalc option off

- Click **Data > Set Data Recalc Off**. Or click the Recalc Off button.

To force calculation while Recalc is off

- Click **Data > Calculate**.

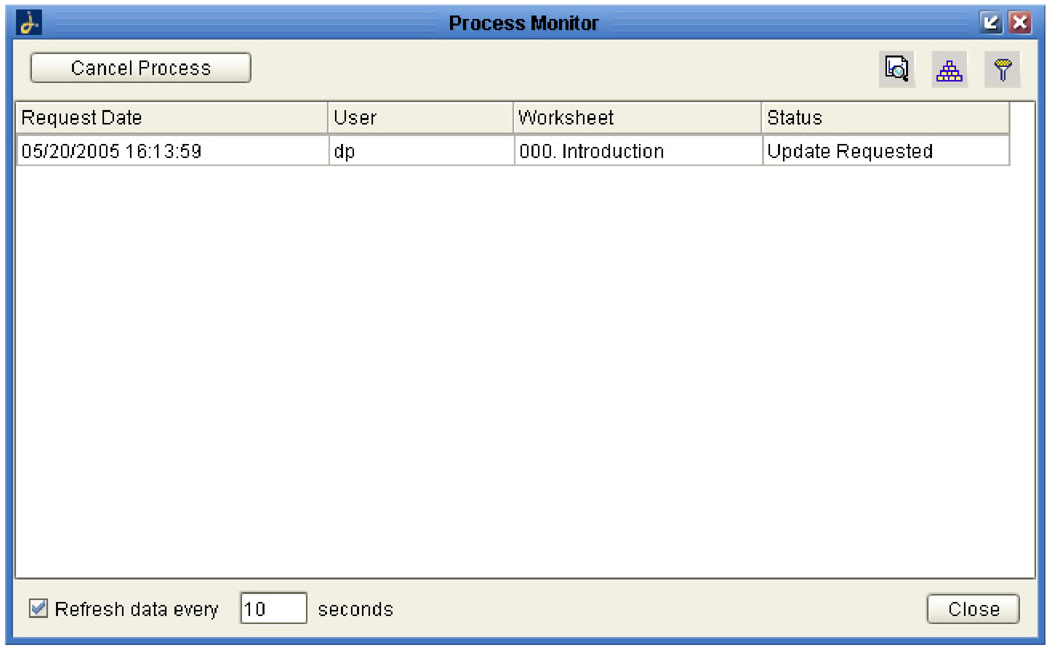
To switch the Recalc option on

- Click **Data > Set Data Recalc On.** Or click the Recalc On button.

Viewing Pending Changes to Data

To see pending data changes

1. Click **Data > Update** to save your data changes.
2. Click **Data > Process Monitor**. Demantra Spectrum displays a screen that shows all data saves that are waiting to be processed:



If you are working at a relatively high level, this takes longer to run.

Sorting Worksheet Data

By default, the worksheet table is sorted in ascending order, according to the current contents of the x-axis, which is usually time. You can sort the worksheet table in either ascending or descending order, according to any series that is displayed in the table.

To sort the worksheet table

- Double-click the header of the column by which you want to sort the worksheet.

  Demantra Spectrum then sorts the entire worksheet table, putting entries in this column in descending order. A downward arrow is added to the column header, to indicate that the table is sorted by this column.

Time	Fixed Plan Lift	Last Year Sal
03/01/2004		475,954
02/02/2004	10,000	372,066
04/05/2004		147,741

To resort in ascending order, double-click the column header again. Demantra Spectrum resorts the table and changes the direction of the arrow.

To restore the default sorting order of the worksheet table

- Click **View > Reset Table Sort**.

Copying and Pasting Data

You can copy and paste data within the worksheet table.

Note From a worksheet, you can also paste data to different Windows products.

To copy data

1. Within a worksheet, do one of the following:
   - In the table, select a cell whose value you want to copy.
   - To copy values from more than one cell, click the first cell, and then drag the mouse to select all cells you want to include.
2. Right-click and then select **Copy**. Or click **Edit** > **Copy**.

To paste data

1. Do one of the following:
   - In the table, select the cell into which you want to paste the data.
   - To paste values into more than one cell, select the upper left data cell of the block of cells into which you want to paste.
2. Right-click and then select **Paste**. Or click **Edit** > **Paste.**

See also

"Saving and Viewing Changes" on page 27

Copying and Pasting to and from Microsoft Excel

You can copy and paste data from a worksheet to Excel and vice versa.

To copy and paste data to Excel

1. Within a worksheet, copy data as described in "Copying and Pasting Data" on page 29.
2. Start Microsoft Excel, open a worksheet, and select a cell or block of cells.
3. Right-click and then select **Paste**.

To copy and paste data from Excel

1. Start Microsoft Excel and open a worksheet.
2. Select one or more cells.
3. Right-click and then select **Copy**.
4. In Demantra Spectrum, select the cell or cells into which you want to paste the data.
5. Right-click and then select **Paste**. Or click **Edit** > **Paste**.

See also

"Exporting Data to Microsoft Excel" on page 30
"Linking Data into Third-Party Reporting Tools (via DOL)" on page 31

Exporting Data to Microsoft Excel

You can export worksheet data to Excel. Your computer's regional settings can affect the results; see the note.

To export data to Excel

1. Within a worksheet, click **File** > **Export**. Or click the **Export to Microsoft Excel** button.

   An export dialog box appears.
2. Select **Current Combination** to export data currently displayed, or **Entire Worksheet** to export all data from the worksheet.
3. Click **OK**.

   A **Save** page appears.
4. Define the location where the worksheet data will be saved and enter a name for the file.
5. Click **Save**.

Note

When receiving data from an external source, Microsoft Excel uses the **Regional Options** in the Windows Control Panel to determine whether a given cell should be formatted as **Currency** or **General** (as is or text). This means that if you export Demantra Spectrum data that is formatted with a currency symbol, and if the Windows Control Panel uses a different currency symbol, those cells will appear in Excel as text values.

If you export to Excel and you receive text values where you wanted currency values, do the following:

1. Open the **Windows Control Panel**.
2. Double-click **Regional and Language Options.**
3. On the **Regional Options** tab, make sure that the **Currency** setting uses the same currency symbol as Demantra Spectrum.
4. Export again from Demantra Spectrum.

Later versions of Excel provide an option for converting problematic cells that it recognizes.

See also

"Copying and Pasting to and from Microsoft Excel" on page 29
"Linking Data into Third-Party Reporting Tools (via DOL)" on page 31

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

When you work within a third-party reporting tool, you can import a Demantra Spectrum worksheet via Demantra's Dynamic Open Link (DOL) technology. This technology lets you use any reporting tool that can connect to the Demantra Spectrum database (which is either Oracle or SQL Server).

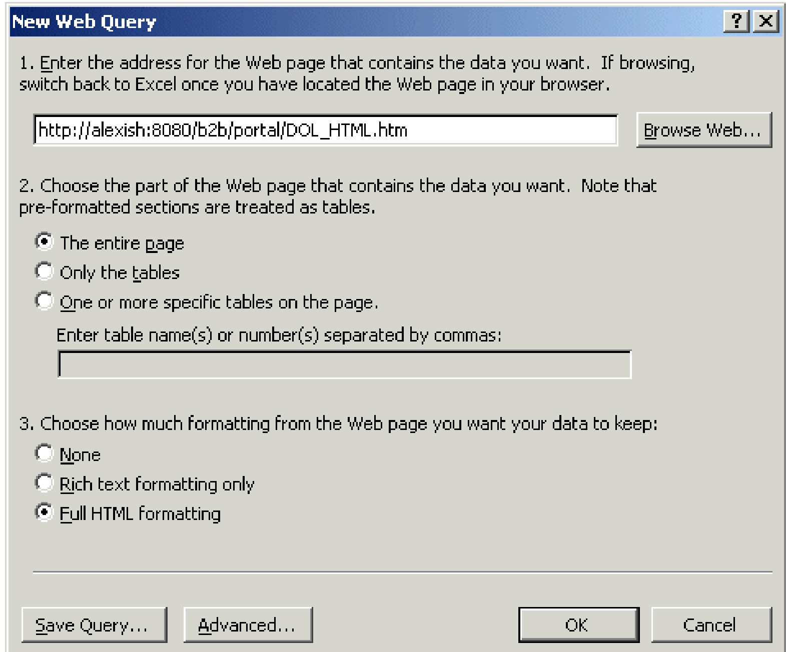
Demantra Spectrum provides a web page (**http://***server name/virtual directory***/portal/DOL_HTML.htm**) to which you can link from your reporting tool, such as Microsoft Excel). Then to access the latest Demantra Spectrum data, you can use the refresh functionality within that reporting tool.

The following steps describe how to link Demantra Spectrum data into Excel, as an example.

To create a worksheet report in Excel

1. In Microsoft Excel, open the **Data** menu.
2. Click **Get External Data** and select **New Web Query**.

The **New Web Query** screen appears.



3. Click **Browse Web...**, which displays a browser.
4. In the address bar, type the following URL and then click **Go**:

   http://*server name/virtual directory***/portal/DOL_HTML.htm**

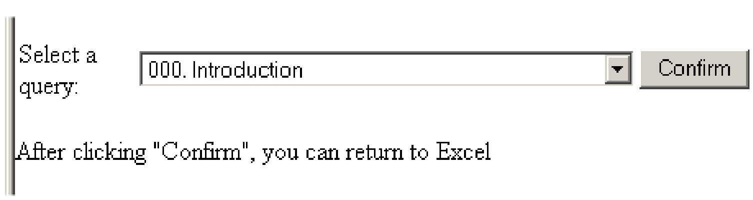
   For example:

   http://frodo/demantra/portal/DOL_HTML.htm

   A login page appears.

5. Type your Demantra Spectrum user name and password and click **Login**.

   The browser now displays the following list of worksheets:



6. Select a worksheet from the dropdown list and click **Confirm**.

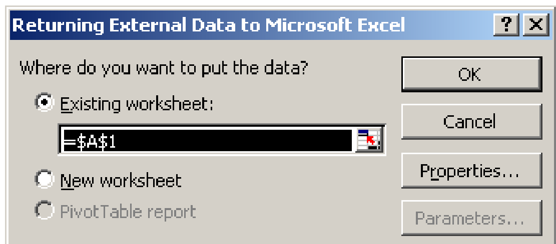
   The worksheet opens in your browser in non-editable HTML format.

7. Optionally close the browser window.
8. Return to Excel, which is still displaying the same dialog box as before.
9. For step 2, select **The entire page**.
10. For step 3, select **Full HTML formatting**.

    Tip To save the query for repeat use, click **Save Query...**

11. Click **OK**.

    Excel asks where to put the data.



12. Make your choice and click **OK**.

    The Demantra Spectrum worksheet opens in Excel.

See also

“Copying and Pasting to and from Microsoft Excel” on page 29
“Exporting Data to Microsoft Excel” on page 30

Printing

To print the displayed data

1. Click **File > Print**. Or click the Print button on the toolbar.

   The **Print Settings** dialog box appears.

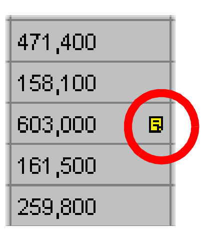
2. Select the required options.

Content selection	Specify whether to print the currently selected item-location combination, all combinations in the worksheet, or the screen.
Layout	Choose portrait or landscape orientation.
Paper	Choose a paper size.
Font	Choose a font size.
Object selection	If this worksheet includes a Gantt chart (which requires a license for Promotions Effectiveness), this option lets you specify whether to include the Gantt chart in the printout.

3. If this worksheet includes a Gantt chart, optionally click the **Gantt Settings** tab. On this tab, specify which promotion attributes to include in the print-out.
4. Click **OK**.
5. Demantra Spectrum displays the normal system print dialog box, where you choose the printer to use, the number of copies to make, and so on.
6. Make selections as you would normally do.
7. Click **OK.**

Viewing Notes

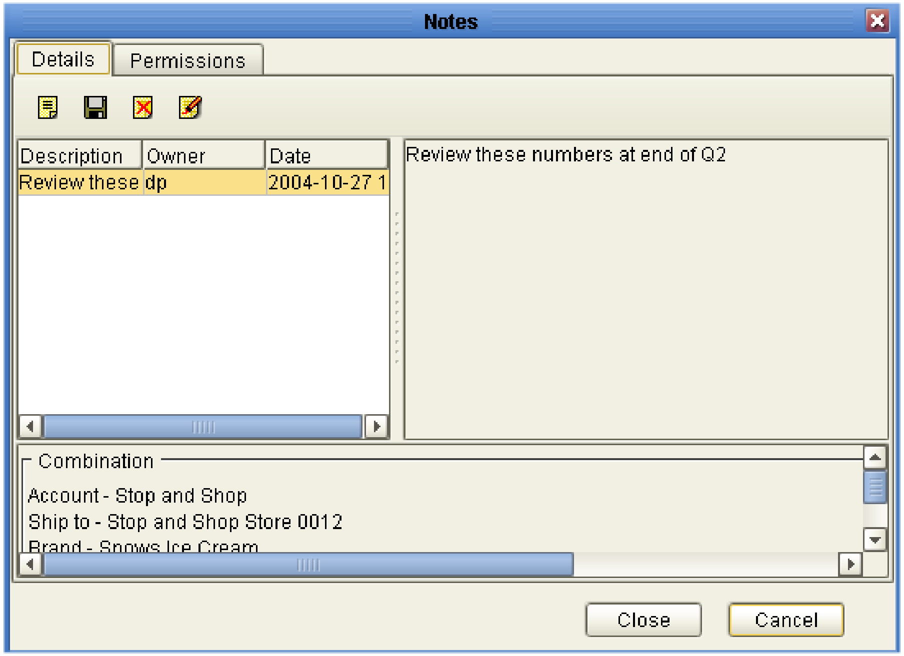
You can add notes to record comments and reminders. You attach the note to combination and date or dates. The worksheet table displays indicator symbols on those dates, generally in only some of the columns (depending on how your system is configured). The following shows an example of the indicator:



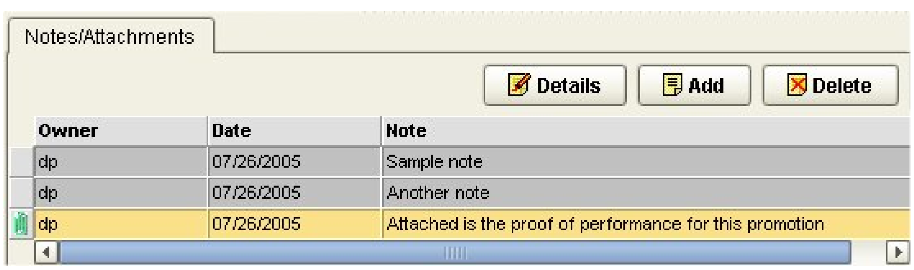
The graph displays an indicator as well:

You can see notes in two different areas:

- In the **Notes** dialog box.



- In the **Notes/Attachments** subtab, if this is included in your worksheet. This subtab also displays any associated attachments.



To open the Notes page

Do one of the following:

- In the table, right-click a cell and select **Notes...** The note will be associated with only this row.
- In the table, select one or more rows, right-click and then select **Notes...**. The note will be associated with each of the selected rows.
- In the table, double-click the left (non-scrolling) column. (Depending on how Demantra Spectrum is configured, this action may not bring up the **Notes** page.)
- In the graph, hold the mouse button over a point, right-click and then select **Notes...**

See also

“Editing Notes” on page 36
“Viewing and Managing Attachments to Notes” on page 37
“Specifying Note Permissions” on page 38

Editing Notes

First display the **Notes** page or the **Notes/Attachments** subtab; see “Viewing Notes” on page 34. In the upper part of the worksheet, click the element to which you want to attach this note.

To add a note

1. If the **Note** box is gray (uneditable), click the Add button.
2. Type a note in the **Note** box.
3. If you are working in the **Notes/Attachments** subtab, you can optionally upload an attachment (see “Viewing and Managing Attachments to Notes” on page 37).
4. Click the Save button.

To edit a note

1. Select a note and click the Edit button.
2. Type a note in the **Note** box.
3. If you are working in the **Notes/Attachments** subtab, you can optionally upload an attachment (see “Viewing and Managing Attachments to Notes” on page 37).
4. Click the Save button.

To delete a note

1. Select a note and click the Delete button.

   The **Confirm Delete** message box appears.
2. Select one of the following:
   - **Partial Deletion** (deletes the note only from the current member and date)
   - **Total Deletion** (deletes the note from all members and dates)
3. Click **OK**.
4. Click **Save**.

See also

“Viewing Notes” on page 34
“Specifying Note Permissions” on page 38

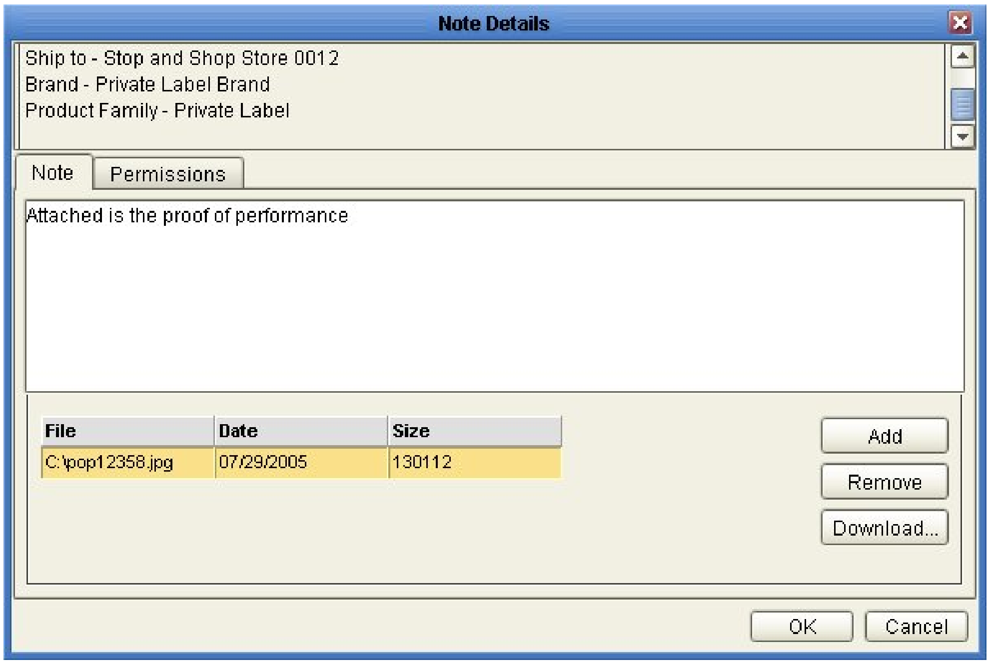
Viewing and Managing Attachments to Notes

You can attach files to the notes, and Demantra Spectrum uploads those files into the database (in compressed form). To view and manage attachments, you work in the **Notes/Attachments** subtab of your worksheet.

To add an attachment to a note

1. Click the note.
2. Click **Details**.

   Demantra Spectrum displays the **Note Details** screen:



3. Click **Add**.
4. Find the file that you want to attach and then click **Open**.

   Demantra Spectrum uploads a compressed version of the file into the database.
5. Click **OK**.

To remove an attachment from a note

1. Click the note.
2. Click **Details**.

   Demantra Spectrum displays the **Note Details** screen:
3. Click the row that lists the attachment and then click **Remove**.
4. Click **OK**.

To download an attachment

1. Click the note.
2. Click **Details**.

   Demantra Spectrum displays the **Note Details** screen:
3. Click the row that lists the attachment and then click **Download**.
4. Specify the directory and filename for the downloaded file and then click **Save**.
5. Click **OK**.

See also

“Viewing Notes” on page 34

Specifying Note Permissions

In general, notes (and their optional attachments) can be viewed by other users. You can specify permissions for the notes, to determine who can read the note and what type of access they are permitted. You can specify permissions for groups or for specific users.

To specify permissions for a note and its attachments

1. On the **Details** tab, select the note.
2. Click the **Permissions** tab.
3. Select the **User Permissions** or **Group Permissions** tab.
4. For each user or group that should have non-default settings for this note, move that user or group from the left list to the right list (**Selected Users** or **Selected Groups**).

   Note Read-only is the default setting for non-selected users or groups.
5. Remove any unwanted users or groups from the right list.
6. Then for each user or group in the right list, do the following:
   a. Click the user or group.
   b. Select a setting from the **Permission** dropdown list at the bottom of the page. The following options are available:

Read and Write	Enables the user or group to read the notes list, edit notes, and add notes.
Read Only	Enables the user or group to read the notes list.
Not Visible	Makes the note list not visible to this user or group.
Full Control	Enables the user or group to read the notes list, edit notes, add notes, and delete notes.

7. Click **Save**.
8. Click **Close**.

Group and user permission priorities

- User permissions take precedence over permissions of any groups the user belongs to.
- If a user belongs to more than one group, the highest level of permissions from the associated groups will be granted.

See also

"Viewing Notes" on page 34

Refreshing the Local Worksheet Cache

Depending on the definition of a worksheet, Demantra Spectrum may store a local copy of the worksheet data on your machine, for faster performance. Also depending on the worksheet definition, the cache may be refreshed automatically or may require periodic refreshing by you.

To refresh your local worksheet cache

- Click **Data > Refresh worksheet data cache**.

See also

"Saving and Viewing Changes" on page 27

Viewing the Audit Trail

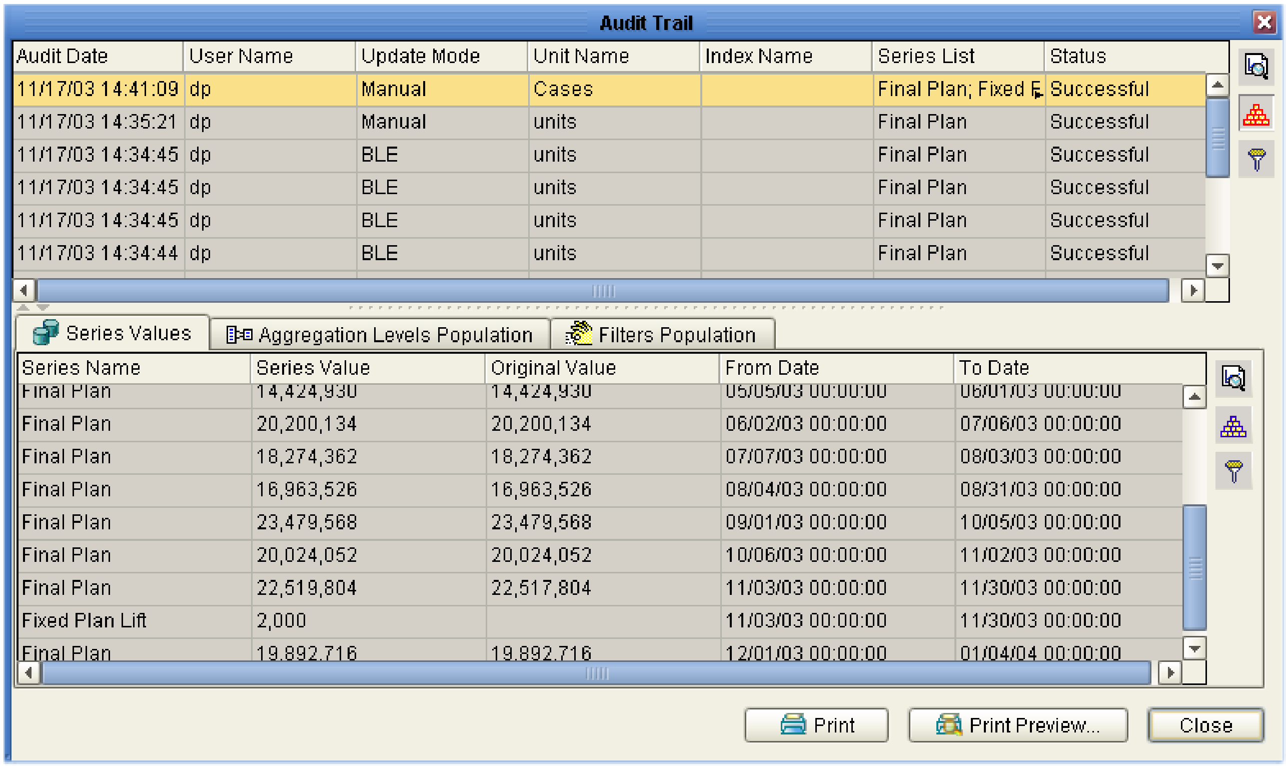
Demantra Spectrum automatically records changes in an audit trail. The audit trail includes changes due to user edits within worksheets, updates created by the Business Logic Engine, copy/paste actions, and changes caused by import.

Note You can see only changes that were made by you or other users who are in the same collaboration groups as you.

Demantra Spectrum provides two ways to view the audit trail:

- You can view the changes that have occurred to the item-location combination that is currently displayed in the worksheet.
- You can create and then execute a profile that specifies a wider set of data: multiple combinations, a wider span of time, and so on.

In either case, the audit trail looks like this:



The top part of the page lists the changes. When you select a row in this table, the bottom part of the page lists details corresponding to that row.

- The **Series Values** tab displays details on the series that were changed.
- The **Aggregate Level Population** tab displays the specific aggregation levels to which this change applies. The change could have occurred at a different aggregation level.
- The **Filtered Population** tab displays the filtering that was used at the time of this change.

Viewing the Audit Trail for a Specific Combination

To view the audit trail for a combination

1. In a given worksheet, select a combination.
2. Click **Data** > **Audit Trail**.

   If any changes have occurred to this combination, the **Audit Trail** screen appears, displaying a table with one row for each recorded change. The following information is displayed:

Audit Date	Date when change was made.
User Name	User who made the change

Update Mode	Indicates the type of change: Manual, BLE (Business Logic Engine) or Integration
Unit Name	Unit of measure that was used at the time of the change
Index Name	Index that was used at the time of the change
Series List	Series affected by the change
Status	In Progress, Fail, or Success

3. To see specific details on this change, click a change in this table and then click the **Series Values** tab.

   This tab displays the following information:

Series Name	Name of the series that was changed.
Series Value	New value used in this series.
Original Value	Original value in this series.
From Date	First date in the series when the change occurs.
To Date	Last date in the series when the change occurs.

4. To see the specific aggregation levels to which this change applies, click the **Aggregate Level Population** tab. The change could have occurred at a different aggregation level.
5. To see the filtering that was used at the time of this change, click the **Filtered Population** tab.

Viewing the Audit Trail for Other Data

An audit trail profile enables you to select a specific portion of the audit trail so that you can view changes that affect more than one combination.

To create or modify an audit trail profile

1. Click **File** > **Audit Trail**.
2. Then:
   - To create a new profile, click **New**.
   - To modify a profile, click an audit trail profile name and click **Modify**.

   The wizard displays a properties screen.
3. In the **Name** and **Description** fields, type a name and optional description.
4. If you want to share this audit trail profile with others, click **Public**.
5. Click **Next**.

   The wizard prompts you for information about the changes you want to see.
6. For **Source Type**, click the check box for each type of change you want to see. Here, BLE represents the Business Logic Engine.

7. For each user whose changes you want to see, move the name from **Available Users** to **Selected Users**.
8. Click **Next**.

   The wizard prompts you for the range of time you are interested in.
9. For **Time Filter**, select **Relative** or **Fixed**, depending on whether you want to define a window of time relative to today.
10. For **From Date** and **To Date**, specify a range of dates.
11. Click **Next**.

    The wizard prompts you to specify the aggregation levels you are interested in.
12. For each aggregation level that you are interested in, move that level from **Available Filter Levels** to **Selected Filter Levels**.
13. Click **Next**.

    The wizard prompts you to specify the series you are interested in.
14. For each series that you are interested in, move that series from **Available Series** to **Selected Series**.
15. Click **OK**.
16. Click **Close** to exit the wizard.

To use an audit trail profile

1. Click **File** > **Audit Trail**.
2. Click an audit trail profile.
3. Click **Execute**.

   Demantra Spectrum displays the specified part of the audit trail. See “Viewing the Audit Trail for a Specific Combination” on page 40.

To delete an audit trail profile

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

5 Managing the Screen

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

Managing Multiple Worksheets

Within Demantra Spectrum, you can open multiple worksheets and display them in tab mode or window mode. In window mode, you can resize, position, minimize, maximize, and tile each window as in other software.

To specify how to display worksheets

Do one of the following:

- Select **Options > Tabs View**/**Windows View**.
- Click the Tabs/Windows toggle button.

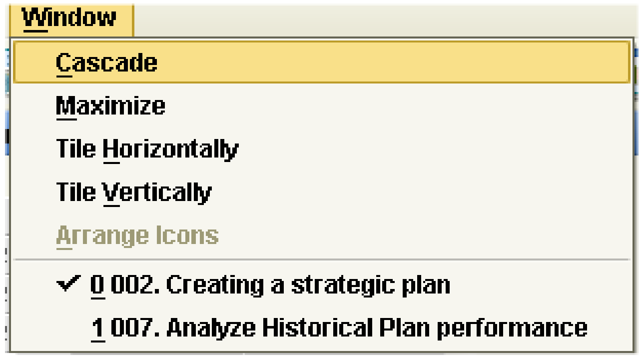
display worksheets as windows

display worksheets as tabs

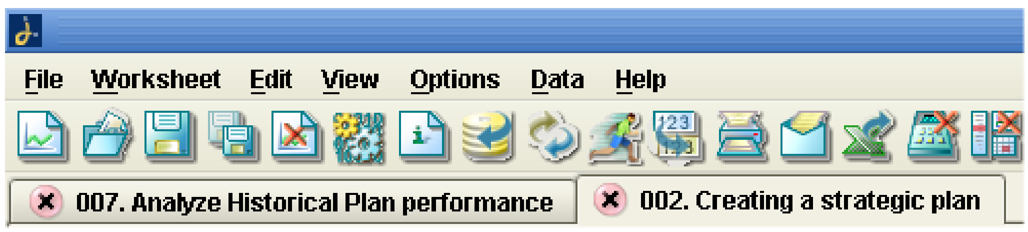
A worksheet contains views, and these views can be displayed as windows or tabs within the worksheet itself. The **Tabs/Windows** setting discussed here has no effect on the views.

To view a worksheet that has already been opened

- In windows view, select the worksheet from the **Windows** menu.



- In tabs view, click the tab corresponding to the worksheet.



To close a worksheet

Do one of the following:

- In windows view, click close (**X**) in the top right corner of the worksheet window.
- In tabs view, click the close symbol (**X**) on the tab.

See also

"Managing Worksheet Views" on page 45
"Managing View Elements" on page 46

Managing Worksheet Views

A worksheet can include multiple *views*, which are displayed as tabs or as windows within the worksheet window itself.

Each view can have a different set of series and a different layout. Within any given worksheet, you can display the views as tabs or as child windows that you can resize and reposition.

Depending on the worksheet definition, the views may or may not be synchronized with each other. If they are synchronized, when you edit in one view, that change automatically appears in the other views.

Note In a given worksheet, if some of the views show data at a higher aggregation level, the data is not editable in those views.

To manage worksheet views

Within any given worksheet, you can display the worksheet views as tabs or as child windows that you can resize and reposition.

- To change how views are shown within the current worksheet, click **Options > Tabs Multiview** or **Options > MDI Multiview**, whichever option is displayed. Or click the corresponding toggle button on the toolbar.

   display views as child windows

   display views as tabs

- If you are currently displaying views as tabs, you can view one tab at a time. Click the tab of the view you want to view.
- When you are displaying views as subwindows, you can resize, reposition, maximize, and minimize each of these subwindows. Also, the **Options** menu provides options for tiling and cascading the subwindows.

See also

“Managing Multiple Worksheets” on page 43
“Managing View Elements” on page 46

Managing View Elements

To hide or redisplay elements of a worksheet view

You can hide elements of a worksheet. To do so, use the **Options** menu. For example, to hide the graph, click **View > Show/Hide Graph**.

Note	This menu includes an option to hide the time axis. You typically use this option only if the worksheet also contains time levels. In such a case, it is desirable to hide the time axis, because it is redundant and takes up space on the screen.

Each of these menu items acts as a toggle. To redisplay what you have hidden, click the same menu item again.

To resize an area in a worksheet view

- Drag a divider to the required position.

To expand or contract an area in a worksheet view

- There are two snap buttons in the upper left of each worksheet area, one with an up arrow and one with a down arrow. Click the snap button pointing in the required direction.

To resize a data column

- Click the vertical divider between two column headers, and drag it horizontally to the required position.

See also

"Managing Multiple Worksheets" on page 43
"Managing Worksheet Views" on page 45

Managing Empty Rows

To hide or display empty rows in the worksheet table

- Click **View > Hide Empty Rows**. This option is a toggle. If you click it again, you redisplay the empty rows.

Note This option does not affect the worksheet graph.

Examples

In some cases, some of the rows of a worksheet table might not contain data, for example:

Cookies - Low Fat

Account	Time	Revenue $	Market Plan $
BJ	03/10/2003	$1,243,435	$1,257,652
	06/09/2003	$1,488,018	$1,771,360
	09/08/2003	$740,175	$901,146
	12/08/2003	$1,031,035	$7,247,500
	03/08/2004	$816,591	$850,507
	Summary	$5,319,254	$12,028,165
Rainbow Company	03/10/2003		$658,800
	06/09/2003		
	09/08/2003		
	12/08/2003		
	03/08/2004		
	Summary		$658,800
Summary		$5,319,254	$12,686,965

Empty Rows Shown | Row: 9, Col: 5

Note that the status bar at the bottom of worksheet indicates that empty rows are currently being displayed.

When you hide empty rows, the result is as follows:

Cookies - Low Fat

Account	Time	Revenue $	Market Plan $
BJ	03/10/2003	$1,243,435	$1,257,652
	06/09/2003	$1,488,018	$1,771,360
	09/08/2003	$740,175	$901,146
	12/08/2003	$1,031,035	$7,247,500
	03/08/2004	$816,591	$850,507
	Summary	$5,319,254	$12,028,165
Rainbow Company	03/10/2003		$658,800
	Summary		$658,800
Summary		$5,319,254	$12,686,965

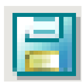
Empty Rows Hidden | Row: 7, Col: 5

Worksheet, Layout, and Data

As you work within Demantra Spectrum, it is important to remember that worksheets are different from the data in them. For example, the definition of a worksheet specifies which series to display and how to aggregate those series for that worksheet. But the worksheet definition does not specify the values that the series contain.

Accordingly, the worksheets and their layouts are saved separately from changes to the data.

- To save changes that you have made to the data in the worksheet, including changes to notes, click **Data > Save Data**. Or click the Save Data button.



- To save changes that you have made to the worksheet definition or to the local layout, click **File > Save Worksheet**. Or click the Save Worksheet button.
    - If you own the worksheet, this option saves the basic worksheet definition and its initial layout. This affects any users of this worksheet who have not yet saved their own layout for it.
    - If you do not own the worksheet, this option saves only your own layout of the worksheet. This has no effect on any other users.

See also

“Worksheet Definition, Layout, and Local Adjustments” on page 49
“Saving and Viewing Changes” on page 27

Worksheet Definition, Layout, and Local Adjustments

As you work with a Demantra Spectrum worksheet, you often sort columns, hide or display features, and make various other changes. It is useful to understand how these settings are saved.

Base Demantra Spectrum configuration These settings affect all users and all worksheets.	• Display format for each series • Initial display width of series and levels • Colors and graph style for each series • Other display colors (generally dependent on a condition)
Worksheet definition These settings are saved via the **File > Save Worksheet** menu option. Only the worksheet owner can make these changes.	• Initial number of views within the worksheet and their initial names • Initial elements (Members Browser, table, graph, and so on) in worksheet view • View synchronization setting • Aggregation levels used in worksheet and *initial* level layout; advanced selection options • Series used in worksheet and *initial* series layout • Time aggregation; time span; time formatting • Filtering and exception filtering • Unit of measure used in worksheet; overall scale used in worksheet, if any; index or exchange rate, if any
Layout changes These settings are saved separately for each user if the user clicks **File > Save Worksheet**. Any user can save these changes, not just the worksheet owner.	• Additional views in the worksheet • New names of worksheet views • *Level layout*: order of levels; placement on axes in each view; whether level is hidden in each view • *Series layout*: order of series; where each series is displayed (table, graph, both) • Hide/show time axis
Local adjustments These settings are saved automatically separately for each worksheet and each user.	• Use of windows or tabs for views within a worksheet • Size and position of the Members Browser, table, graph, and so on in each view • Sorting in the worksheet table • Graph type; legend; grid lines • Hide/show empty rows setting • Activity synchronization setting (Options menu)
Not saved	• Changes to column widths in the worksheet table • Initial view focus; focus in each worksheet view • Expansion state in the Members Browser and Activity Browser • Focus and scroll in all areas • Zoom setting in Gantt

The autorun option (Options menu) is saved separately for each user, but applies to all worksheets that the user sees.

Part II TPM and PMO Business Processes

6 Demantra Dashboard

This chapter introduces the Demantra dashboard: Collaborator Workbench.

Introduction to the Dashboard

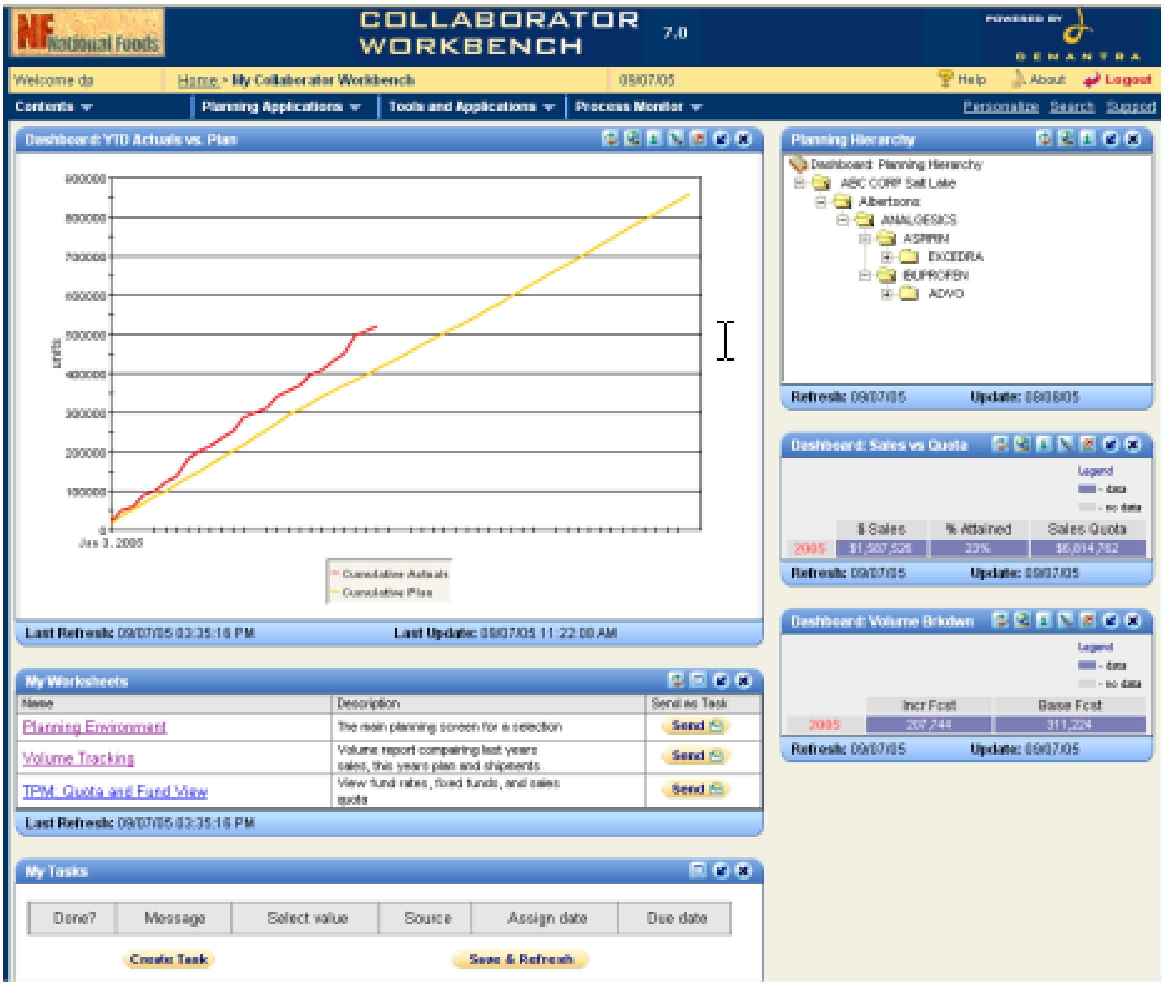
Demantra’s Collaborator Workbench is the starting point for Demantra’s Promotion Modeling & Optimization application. This dashboard is designed for use by sales managers. You log into the application and immediately have access to a number of key performance indicators (KPIs). You can also jump directly to TPMO worksheets, which are working environments that support specific business processes; these are described in the following chapters.

To log into the dashboard

1. In Windows, click **Start** and click **Programs**.
2. Click **Demantra > Demantra Spectrum** *release* **> Collaborator Workbench**.
3. In the **Log On** dialog box, enter your user name and password.Click **Login**.
4. If the toolbar includes a link labeled **Click here to install Java Web Start**, click that link.

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

After you install this software, Collaborator Workbench comes up, displaying your personal page. Initially, this page looks like this:



At this point, Demantra Spectrum might display a dialog box that asks if you want to trust the signed application distributed by Demantra.

Note In some cases, you do not see this dialog box until you click a worksheet name.

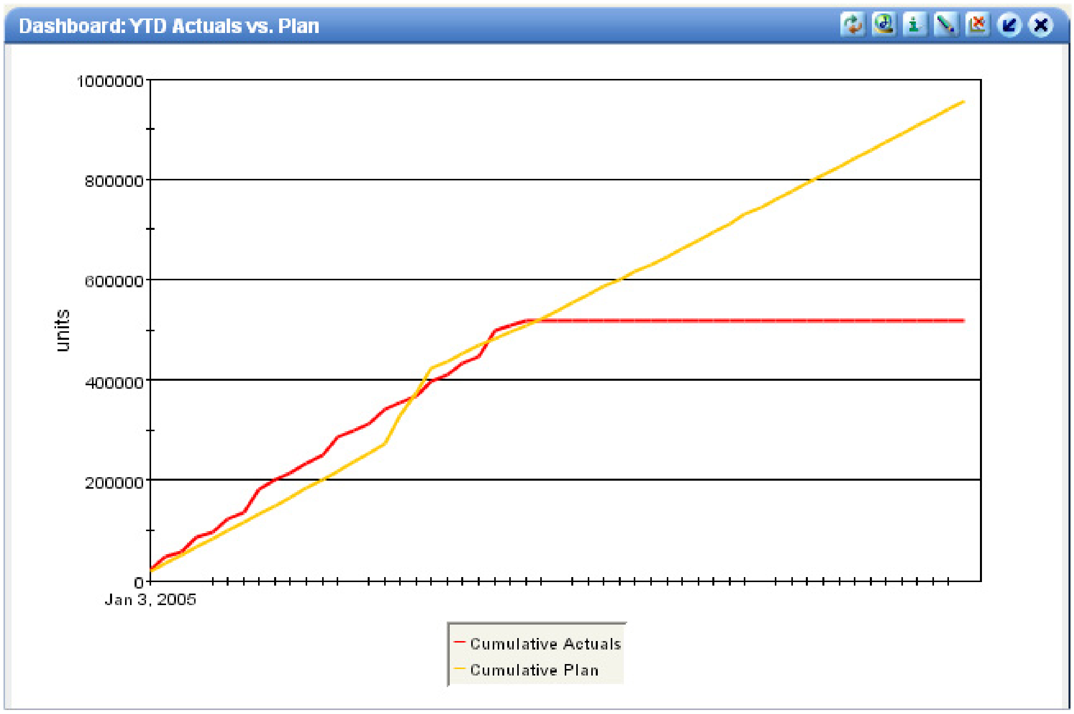
6. Click **Yes** (or **Always**) or **Start**.

Reviewing Metrics

Collaborator Workbench displays summary panes that display critical information and which you can customize to your needs. Initially, it displays the following summary panes.

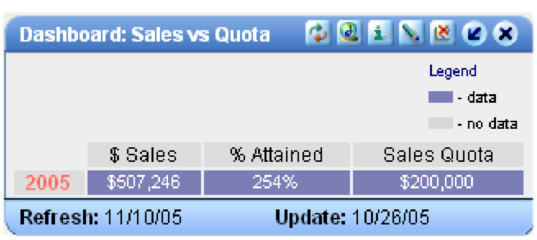
Actuals versus Plan

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



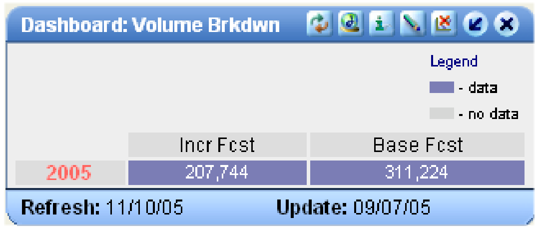
Sales versus Quota

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



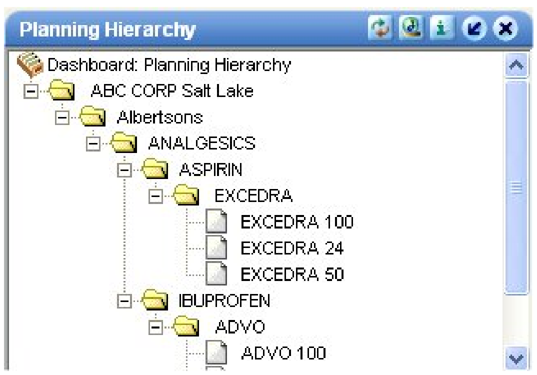
Volume Breakdown

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



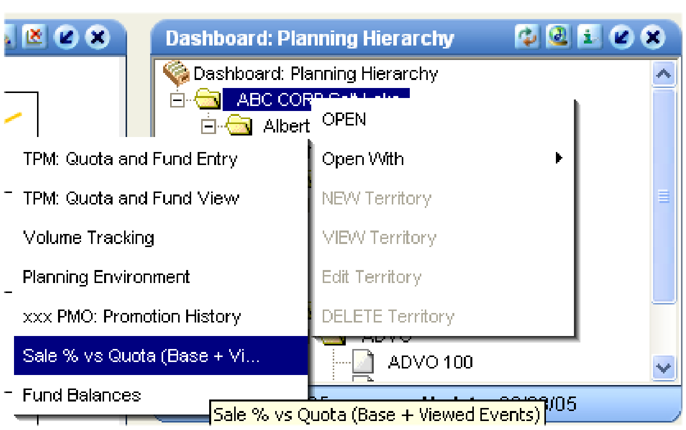
Reviewing the Planning Hierarchy

The **Planning Hierarchy** is an expandable, treelike view that you can use to navigate the planning hierarchy:



Expand the hierarchy as needed.

You can right-click for more options:



Opening Worksheets

My Worksheets lists critical worksheets. Each worksheet is a working environment designed for specific TPM and PMO business processes. Here, you can do the following:

- Click a worksheet to open it.
- Send a worksheet as a task to another user; see “Creating and Sending a Task” on page 58.

To open a worksheet

1. Click a worksheet listed in **My Worksheets**.

   At this point, Demantra Spectrum might display a dialog box that asks if you want to trust the signed application distributed by Demantra.
2. Click **Yes** (or **Always**) or **Start**.

See also

“Configuring My Worksheets” on page 61

Managing Tasks

My Tasks lists all tasks that are assigned to you and that you have not yet addressed. For example, if you are a manager, you will receive promotions that require approval.

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

To view all assigned tasks

If you have many open tasks, the **My Tasks** module does not necessarily display all of them. To check for additional tasks:

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

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

To mark a task as done

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

1. First:
   - Select the appropriate response from the dropdown list in the **Select value** column. The check box next to the task is automatically checked.

- If there is no dropdown list, just click the check box to the left of the task.

2. Click the **Save & Refresh** link at the bottom of the task list.

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

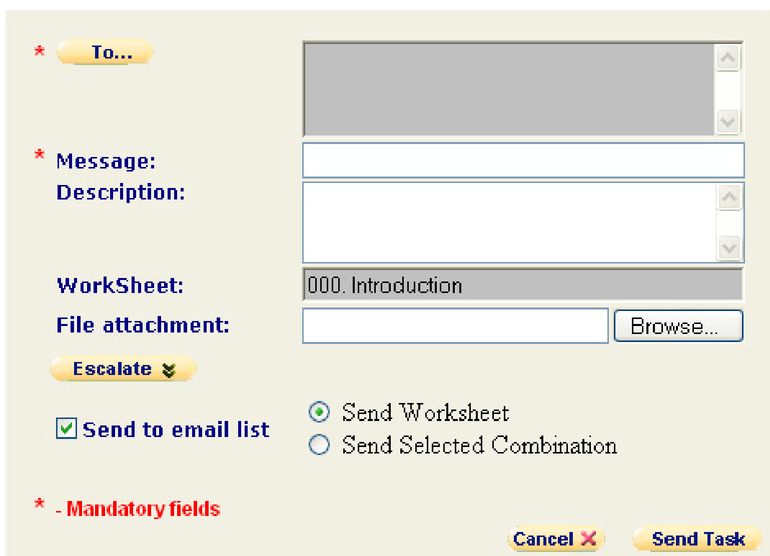
Caution If you go to another page or log off without clicking **Save & Refresh**, then your changes will be lost.

Creating and Sending a Task

To create and send a task

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

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



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

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

   This description will be displayed below the task message in the recipient's **My Tasks** module.

5. To link the task subject line to a Web page, enter the full path to the file in **URL** field.

Note	You must enter the full URL, including server name and directory hierarchy. The **http://** part will be added automatically if omitted.

6. To attach a file to the task, enter the path to the file in the **File Attachment** field or use the **Browse** button to find it.
7. To ensure that this task is completed by a specific time, click **Escalate** and then provide the following information:

Due Date	Date and time by which this task must be completed
Alert Time	Date and time at which an alert will be displayed
To	Additional email addresses

8. To send an email notification to the recipient of the task, select the **Send email list** check box. (Depending on how your system has been configured, this option may not be available.)
9. Click either **Send Worksheet** or **Send Selected Combination** to specify whether to filter the worksheet. If you click **Send Selected Combination**, the worksheet is filtered to the combination that you are currently viewing; otherwise, the entire worksheet is sent.
10. Click **Send Task**.

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

Personalizing the Dashboard

You can personalize Collaborator Workbench in several different ways.

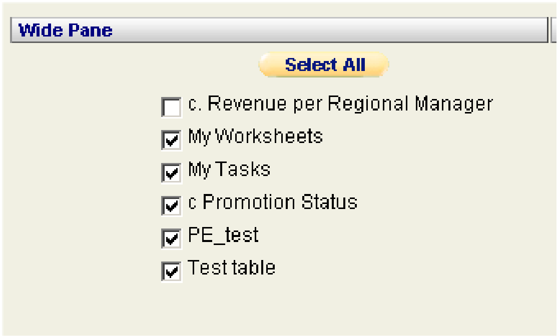
Configuring Your Default Layout

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

To personalize your default layout

1. Click the **Personalize** link.

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

   These lists include the following:

   - **My Tasks** and **My Worksheets**, which can be displayed only in the wide pane.
   - **Who's Online**, which can be displayed only in the narrow pane.
   - Worksheets that have been defined as content and to which you have access.

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

3. Click **Next**.

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

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

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

5. Click **Next**.

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

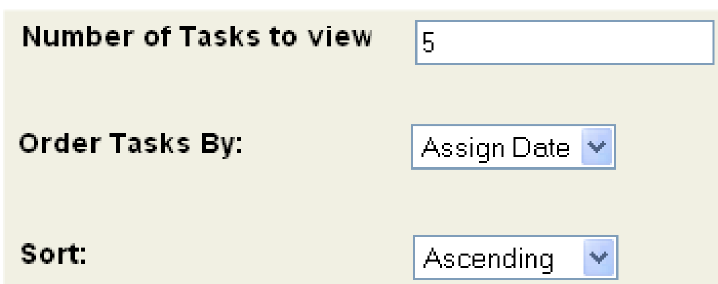
6. Click **Finish** to save your changes. Or click **Back** to go back to the previous pages.

Configuring My Tasks

To configure My Tasks

1. If Collaborator Workbench is not currently displaying **My Tasks**, then display it as described in “Configuring Your Default Layout” on page 59.
2. In **My Tasks** module, click the personalize button in the upper right corner of the pane.

Collaborator Workbench displays a page like the following:



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

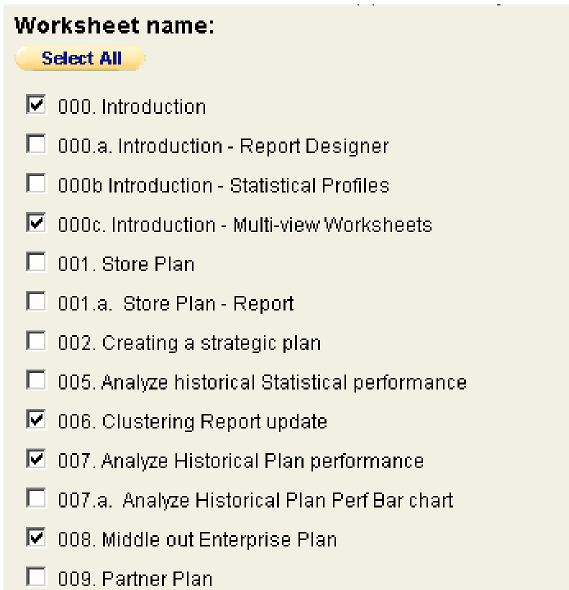
My Collaborator Workbench refreshes with **My Tasks** in the new configuration.

Configuring My Worksheets

To configure My Worksheets

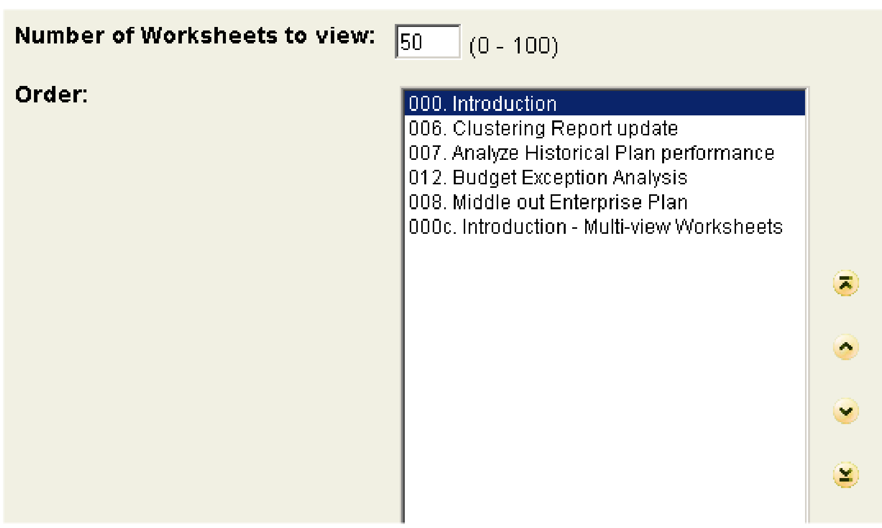
1. If Collaborator Workbench is not currently displaying **My Worksheets**, then display it as described in “Configuring Your Default Layout” on page 59.
2. In **My Worksheets** module, click the personalize button in the upper right corner.

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



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

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



5. In the **Number of Worksheets to View** field, type the maximum number of worksheets that you want to see in **My Worksheets**.
6. In the **Order** list, click a worksheet and then click the up or down arrows to specify the display order of that worksheet. Repeat as necessary.
7. Click **Finish** to save your changes. Or click **Back** to go back to the previous pages.

7 TPM: Managing and Viewing Quotas and Funds

This chapter describes how to manage or view quotas and funds in Demantra Spectrum, as part of the TPM business process. It includes the following sections:

About Quotas and Funds

Demantra Spectrum displays a standard set of promotion funds, broken out as follows:

- Brand Development Funds (BDF): Base rate, development rate, and fixed funds
- Market Development Funds (MDF): Base rate, development rate, and fixed funds
- Slotting funds

Typically, you view these funds at the same time that you view the sales quotas that they are intended to support.

Quotas can be assigned at any level, including down to the SKU level if you want to manage at the lowest level of detail.

Managing Quotas and Funds

If you are an administrative user or senior manager, you can set values for quotas and funds. You use the **TPM: Quota and Fund Entry** worksheet, which provides the following information:

- Entry point for fund details including base rate, development rate and fixed funds for Brand Development Funds (BDF) and Market Development Funds (MDF)
- Summarized total authorized funds for BDF, MDF and slotting, as well as the overall total
- For comparative purposes, total forecast and sales quota
- At-a-glance graphical summaries of authorized funds by promotion group
- At-a-glance graphical summary of quotas by promotion group

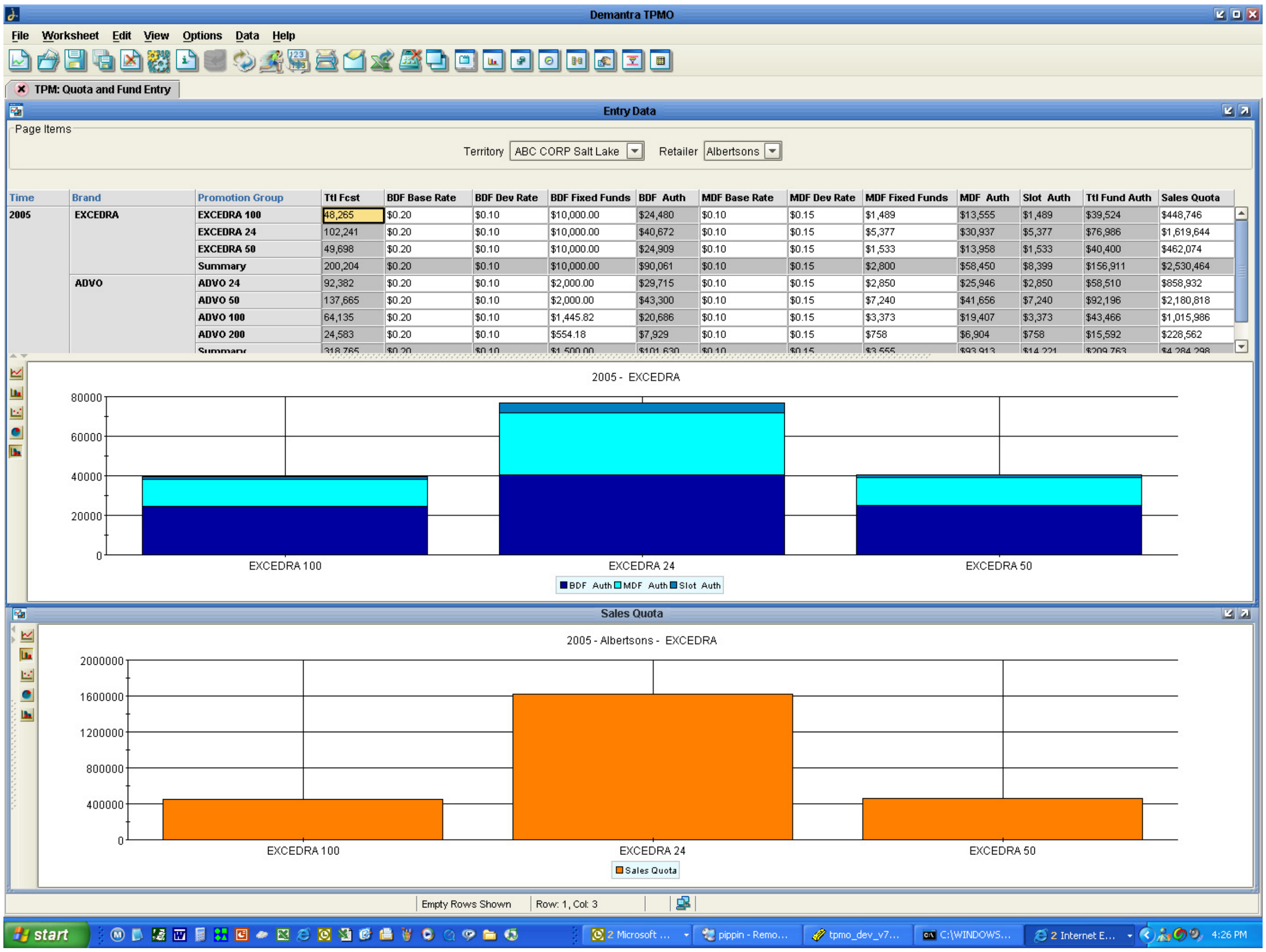
To manage quotas and funds

1. In **My Worksheets** (in Collaborator Workbench), click **TPM: Quota and Fund Entry**.

   Or in the Worksheet Viewer, click **File > Open**. Click **TPM: Quota and Fund Entry** and then click **Open**.

2. If the worksheet does not show data immediately, click **Data** > **Rerun**. Or click the Run button.

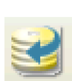
3. At the top of the screen, select the territory and then the retailer to display.



The table shows all the quotas and funds for each brand, broken down by promotion group. For each promotion group, the quotas and funds are displayed in weekly buckets.

As a quick visual aid, when you click a row, the graphs in the rest of the worksheet show data for that brand and promotion group.

4. Edit the quota and fund values as needed.



5. Click **Data > Save Data**. Or click the Save Data button.

See also

“Working with Data” on page 25

Viewing Quotas and Funds

If you are a sales representative, you can view authorized funds against your sales quota. You use the **TPM: Quota and Fund View** worksheet, which is a read-only version of the **TPM: Quota and Fund Entry** worksheet.

To view quotas and funds

1. Click **File > Open**. Or click the Open button.
2. Click **TPM: Quota and Fund View** and then click **Open**.
3. If the worksheet does not show data immediately, click **Data** > **Rerun**. Or click the Run button.

4. At the top of the screen, select the territory and then the retailer to display.

   The table shows all the quotas and funds for each brand, broken down by promotion group. For each promotion group, the quotas and funds are displayed in weekly buckets.

   As a quick visual aid, when you click a row, the graphs in the rest of the worksheet show data for that brand and promotion group.

Reference

TPM: Quota and Fund Entry

Hierarchy

This worksheet uses the following hierarchy levels:

Levels you can select:	Territory, Retailer
Levels used in cross tabulation:	Brand, Promotion Group

Business Data

View	Series	Purpose
Entry Data	BDF Auth	Authorized Brand development funds displayed to the user in the field
	BDF Base Rate	Brand development fund base rate -- entered by the corporate HQ
	BDF Dev Rate	Brand Development Fund Development rate, entered by corporate HQ
	BDF Fixed Funds	BDF Fixed funds -- not dependent on volume, allocated by Corp HQ
	MDF Auth	Authorized Market development funds displayed to the user in the field
	MDF Base Rate	Base rate -- entered by the corporate HQ
	MDF Dev Rate	Development rate, entered by corporate HQ
	MDF Fixed Funds	Fixed funds -- not dependent on volume, allocated by Corp HQ
	Sales Quota	This series is used by Corporate HQ to enter quota.
	Slot Auth	Slotting budget authorized for the field user
	Ttl Fcst	The total of the base and incremental values calculated by the Demantra engine
	Ttl Fund Auth	Sum of authorized MDF, BDF and slotting fund
Sales Quota	Sales Quota	This series is used by Corporate HQ to enter quota.

TPM: Quota and Fund View

Hierarchy

Same as the **TPM: Quota and Fund Entry** worksheet; see "TPM: Quota and Fund Entry" on page 66.

Business Data

Same as the **TPM: Quota and Fund Entry** worksheet; see "TPM: Quota and Fund Entry" on page 66.

8 TPM: Tracking Volume

This chapter describes how track sales volume, as part of the TPM business process. It includes the following sections.

Tracking Volume

The **Volume Tracking** report is where product, territory, and account volumes are forecast and monitored to ultimately feed volume requirements to operations. Fund planning already covered will be integrated with volume planning, because forecast volumes drive budgets in live accrual environments and drive spending for case rate allowances and other variable spending deals.

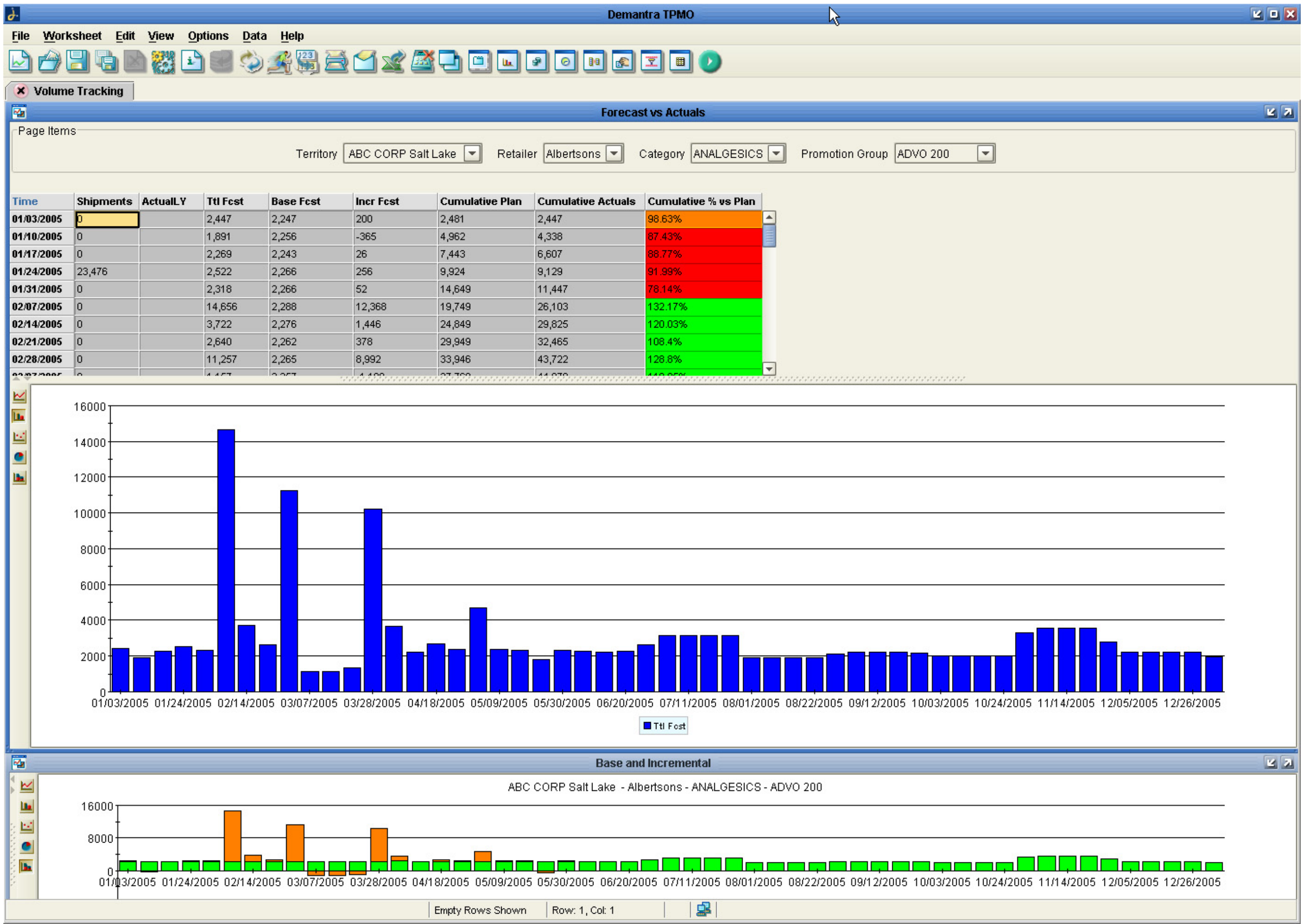
To open the* Volume Tracking *report

1. In **My Worksheets** (in Collaborator Workbench), click **Volume Tracking**.

   Or in the Worksheet Viewer, click **File > Open**. Click **Volume Tracking** and then click **Open**.

2. If the worksheet does not show data immediately, click **Data** > **Rerun**. Or click the Run button.

The screen now displays the following areas:



3. At the top of the screen, select the territory, retailer, category, and then promotion group whose volume you want to see.

The **Volume Tracking** report compares last year's sales to this year's plan. On a weekly basis, it tracks the following:

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

The information here can be updated weekly to give you an up-to-date tally of how you are performing versus your plan. Numbers are highlighted in different colors to give you a quick and easy way to keep abreast of your performance:

- Green is above plan
- Orange is slightly below plan (95-99.99%)

- Red is more than 5% below plan

In addition, you see a weekly graphical representation of your current 52 weeks base and incremental sales, actuals and projections as well as a week-by-week look at your total volume.

Reference

Volume Tracking

Hierarchy

This worksheet uses the following hierarchy levels:

Levels you can select:	Territory, Retailer, Category, Promotion Group
Levels used in cross tabulation:	None

Business Data

View	Series	Purpose
Base and Incremental	Base Fcst	The base forecast as calculated by the Demantra engine
	Incr Fcst	The incremental forecast as calculated by the Demantra engine.
Forecast vs. Actuals	ActualLY	Demand for this period one year ago
	Actuals Ttl	The total actual quantity (base plus incr).
	Base Fcst	The base forecast as calculated by the Demantra engine
	Cumulative % vs Plan	Cumulative actuals to date versus forecast cumulative to date.
	Cumulative Actuals	The total actuals (base plus lift) cumulative to date.
	Cumulative Plan	The cumulative frozen plan.
	Incr Fcst	The incremental forecast as calculated by the Demantra engine.
	Plan Vol	Planned volume
	Shipments	The shipment history from the mfg company to the ship to of the retailer.
	Ttl Fcst	The total of the base and incremental values calculated by the Demantra engine

9 PMO: Planning Promotions

This chapter describes how to create, evaluate, and plan promotions, as part of the PMO business process. It includes the following sections:

Overview of the Promotion Life Cycle

When you first create a promotion, its status is initialized as **Unplanned**. Unplanned promotions are considered hypothetical and do not have an impact on the promotion funds or on the forecast.

Once you are ready to use the event in forecasting, you change its status event to **Planned**. This causes several things to happen:

- The cost of the promotion is deducted from the available balance of funds.
- When the Analytical Engine runs next, its forecast includes the proposed promotion. The forecast will show both the baseline and incremental volume for the proposed promotion. In addition, the system will calculate measures to be used for the cost benefit review. These include profit for the manufacturer and retailer, available fund balances as well as the proposed cost for the promotion.

Next, either you or your supervisor should approve the promotion by changing its status to **Approved**.

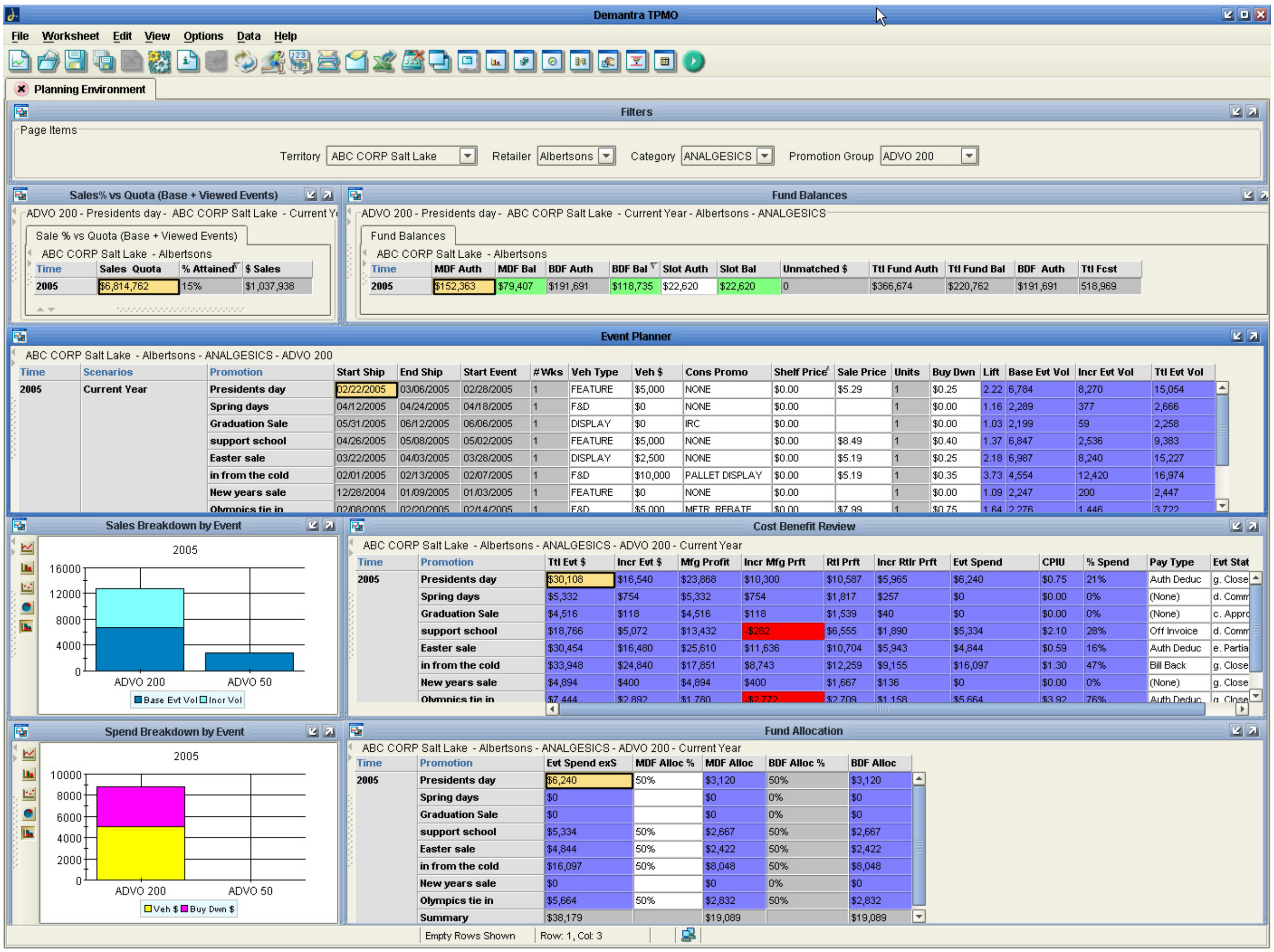
When you have a firm agreement that the retailer will run this event, you change its status event to **Committed**. This has the following effect:

- Overnight, a batch process makes a snapshot of every promotion whose status was changed to **Committed**.
- The committed promotions are included in all projections.

After the promotion is run and the retailer has been paid, you can change the promotion status to **Paid** and then later to **Closed**, as appropriate.

Introduction to the Planning Environment

You plan and manage promotions in the **Planning Environment**, which is the entry point to both historical and planned event analysis. Event planning consists of creating and managing a calendar of promotional events, and understanding their impact on sales, promotion spending, and profitability, as well as their correlation with sales quotas. Demantra's **Planning Environment** provides all this critical information in one place.



To open the Planning Environment

1. In **My Worksheets** (in Collaborator Workbench), click **Planning Environment**.

   Or in the Worksheet Viewer, click **File > Open**. Click **Planning Environment** and then click **Open**.

2. If the worksheet does not show data immediately, click **Data** > **Rerun**. Or click the Run button.
3. At the top of the screen, select the territory, retailer, category, and promotion group.

   The screen now displays the following information for the selection:

   - Sales % vs. Quota—Analysis of planned sales to sales quota, including % of quota attained and average retail price. This allows you to view your current sales versus both budget and forecast.
   - Fund Balances—Detailed overview of authorized funds (MDF, BDF, slotting), spend and fund balances to date
   - Event Planner—Details of all events, including start and end ship dates, vehicle type, vehicle cost, buydown, base volume and incremental volume. Incremental volume is generated by Demantra’s comprehensive analytical engine
   - Sales KPIs—Sales Breakdown by Event (includes base and incremental volume), Spend Breakdown by Event (vehicle and buydown)
   - Cost Benefit Review—Detailed cost benefit analysis, including profitability metrics from both the manufacturer and retailer’s perspective, overall event spend, cost per incremental unit (CPIU), payment type and price analysis (average retail vs. list)
   - Fund Allocation—You can allocate the promotional costs across different funds.
4. In the **Event Planner** window, click a promotion to see further details.

   The windows below this display graphical information for that promotion. You can navigate through the various promotions. As you do so, the corresponding graphs are updated to reflect this data.

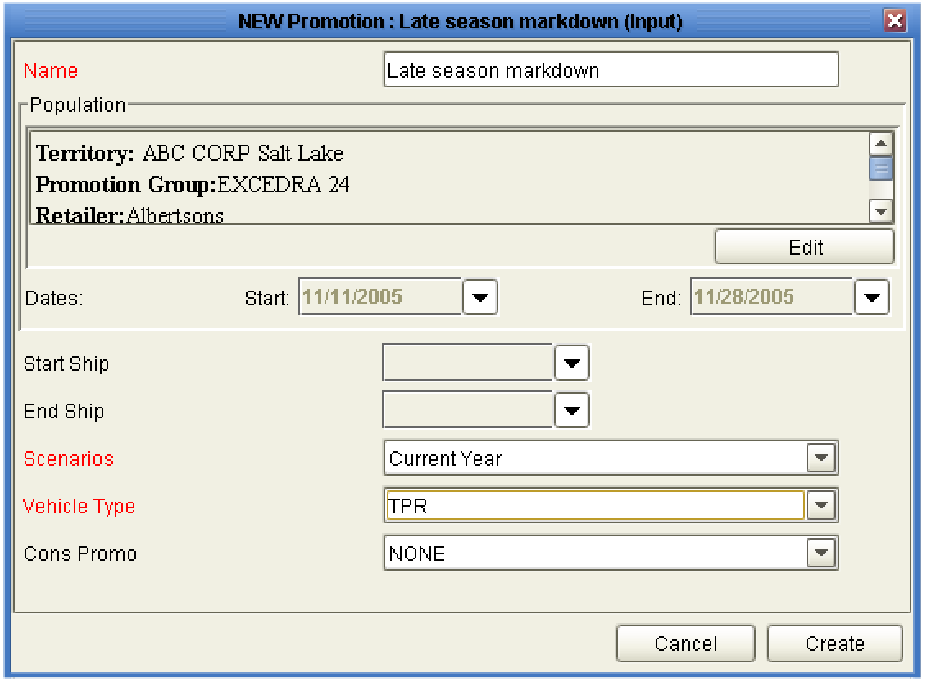
Creating a Promotion

To create a promotion

1. You typically start in the **Planning Environment**; see “Introduction to the Planning Environment” on page 72.
2. At the top of the screen, select the territory, retailer, category, and then promotion group with which you want to create the promotion.
3. In the **Event Planner** window, right-click an existing promotion and then select **New Promotion**.

   Tip You can do the same thing in any area of the worksheet that displays promotions.

Demantra Spectrum displays the following screen.



4. For **Name**, specify a unique name.

5. The **Population** area shows the currently selected combinations with which the new promotion will be associated. The defaults are taken from the current selection in the worksheet.

6. For **Dates**, specify the starting and ending date of the promotion.

7. The rest of the fields prompt you for values of attributes associated with this promotion; the fields shown in red are required. The specific attributes you see depend upon your configuration, but they may include the following:

   - For **Scenario**, choose the upper promotion level to which this promotion belongs. (In this example, promotions belong within scenarios.)

   - For **Promotion Type**, choose a type of promotion that affects demand as closely as possible to the promotion you are creating.

Note It is important to specify appropriate values for the attributes, because the Analytical Engine considers them when it creates the forecast.

8. Click **Create**. The new promotion is created and is displayed in the **Event Planner** area.

9. In the **Event Planner** area, edit promotion details such as the following.
   - Account
   - Product
   - Vehicle type
   - Start ship
   - Start event

- # of weeks
- Sale Price
- Shelf Price
- Buy Down

10. Click **Data > Save Data**.

See also

“Copying and Pasting a Promotion” on page 77

Modifying a Promotion

To modify a promotion

1. You typically start in the **Planning Environment**; see “Introduction to the Planning Environment” on page 72.
2. In the **Event Planner** window, edit any details in the row corresponding to the promotion.
3. Click **Data > Save Data**.
4. To rename the promotion, right-click it, click **Edit**, type a new name and click **Finish**.

Tip You can do this in any area of the worksheet that displays promotions.

If you need to reassociate this promotion with a different territory, retailer, and so on, see “Reassociating a Promotion with a Different Item or Location” on page 75.

Reassociating a Promotion with a Different Item or Location

When you create a promotion, it is automatically associated with the items and locations where you were working. You can reassociate the promotion with different items or locations if needed.

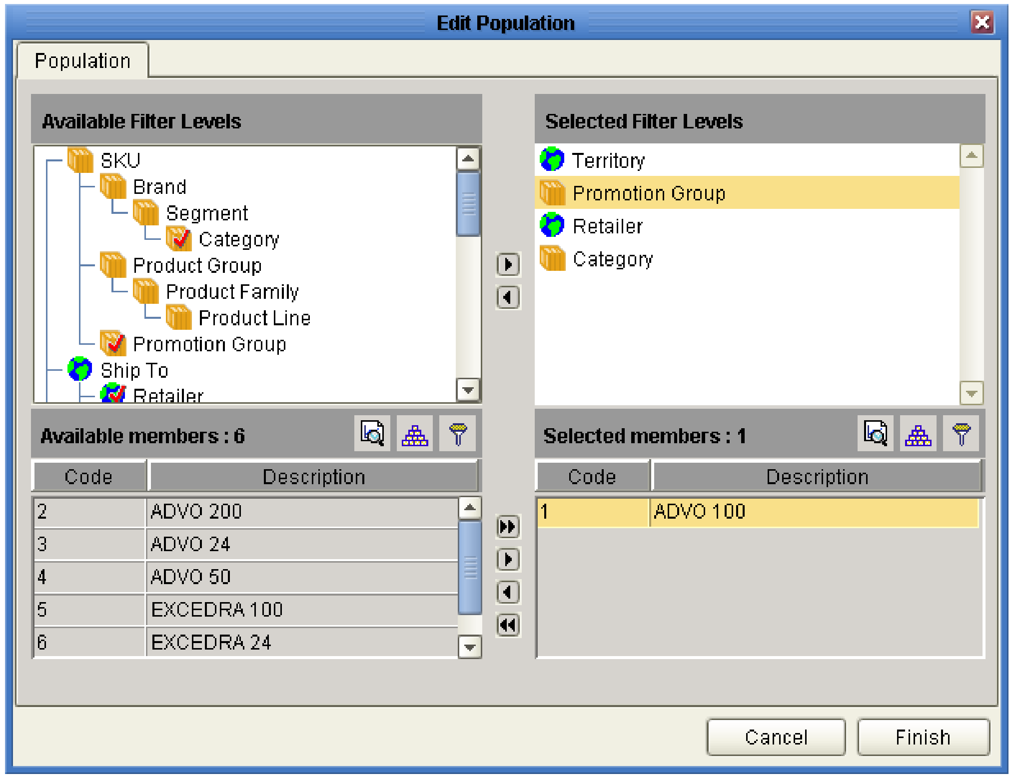
To reassociate a promotion

1. You typically start in the **Planning Environment**; see “Introduction to the Planning Environment” on page 72.
2. In the **Event Planner** window, right-click a promotion and click **Edit**.

Tip You can do the same thing in any area of the worksheet that displays promotions.

3. Click **Edit** below the **Population** area.

The following dialog box is displayed:



Usually a promotion is associated with a territory, retailer, category, and promotion group.

4. To change the territory, retailer, category, or promotion group, click that level name in **Selected Filter Levels** and change the selection displayed in **Selected members**.

   For example, to associate the promotion with a different promotion group:

   a. In **Selected Filter Levels**, click Promotion Group.

   b. In the **Selected members** list, double-click the promotion group that you no longer want to use for this promotion. For example, double-click ADVO 100 to remove it from this list.

   c. In **Available members**, double-click the promotion group that should be used. This promotion group is then moved to the **Selected members** list. For example, double-click ADVO 200 to move it to the **Selected members** list; now the promotion is associated with ADVO 200 instead of ADVO 100.

5. Repeat as necessary.

6. Click **Finish** to exit this dialog box.

7. Click **Finish**. The changes are saved.

8. Rerun the worksheet to see the changes.

Copying and Pasting a Promotion

To copy and paste a promotion

1. You typically start in the **Planning Environment**; see "Introduction to the Planning Environment" on page 72.
2. In the **Event Planner** window, right-click a promotion and click **Copy**.

Tip You can do the same thing in any area of the worksheet that displays promotions.

3. Right-click and then select **Paste**.

   Demantra Spectrum displays a dialog box that asks for details about the copy.
4. Specify one of the following:
   - To shift the dates of the newly copied promotion, specify a number in the **Shift By** field. The copy will be shifted later in time by the specified amount, but will last for the same length of time. You can use any integer, including negative number or zero.
   - To specify a different start and end date, specify values in the **From** and **To** fields.
   - To make the new promotion span the entire length of time used in the worksheet, select **Worksheet Derive**.
5. Click **OK**.
6. Click the newly copied promotion and then select **Edit**.
7. Enter a new name and click **Finish**.

See also

"Modifying a Promotion" on page 75
"Creating a Promotion" on page 73

Deleting a Promotion

To delete a promotion

1. You typically start in the **Planning Environment**; see "Introduction to the Planning Environment" on page 72.
2. In the **Event Planner** window, right-click a promotion and click **Delete**.

Tip You can do the same thing in any area of the worksheet that displays promotions.

3. Demantra Spectrum prompts you to confirm the action. Click **Yes** or **No**.

4. Rerun the worksheet to see the change.

See also

"Creating a Promotion" on page 73

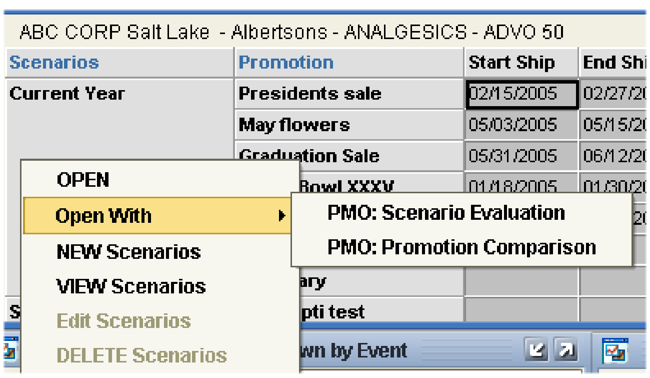
Comparing Promotions in a Scenario

To determine how best to spend trade dollars, you can compare and evaluate multiple promotions in a scenario. The **PMO: Promotion Comparison** worksheet provides this capability.

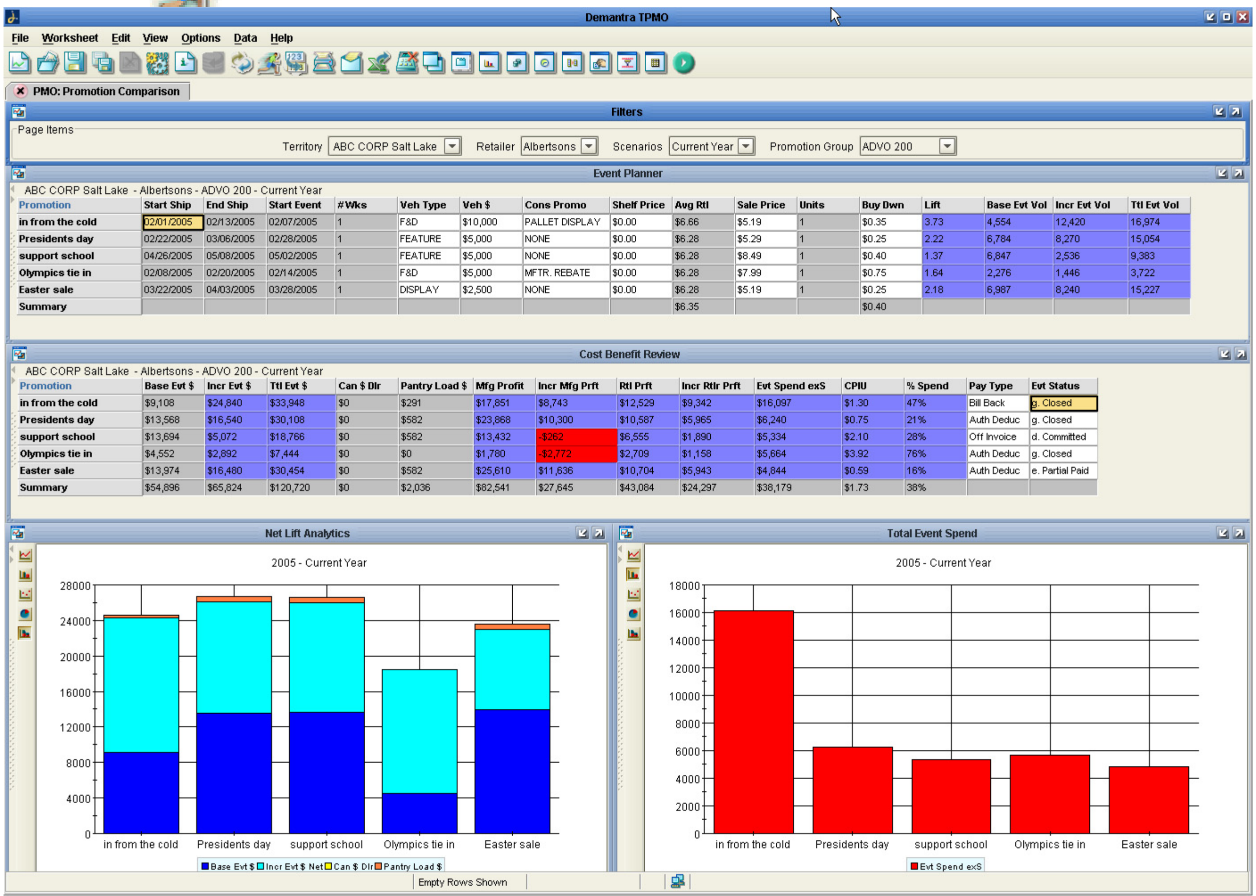
You can define several different promotions and compare their results side by side. This allows you to quickly spot the best promotion for each opportunity. Once completed, you can choose the best promotion(s) and add them to your current plan simply by changing the status to **Planned**.

To compare promotions in a scenario

1. You typically start in the **Planning Environment**; see "Introduction to the Planning Environment" on page 72.
2. In the **Event Planner** window, right-click a scenario and click **Open With > PMO: Promotion Comparison**.



3. If the worksheet does not show data immediately, click **Data** > **Rerun**. Or click the Run button.



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

Now you can easily compare all events in the selected scenario. The two graphs provide the visuals to allow a more in-depth look at the spending levels and true lift of each promotion side-by-side.

Note the extensive use of colors to provide indication of key benefits from both the manufacturer’s and the retailer’s perspective.

The screen now displays the following areas:

- Event Planner: details of all events, including start and end ship dates, vehicle type, vehicle cost, buydown, base volume and incremental volume. Incremental volume is generated by Demantra’s comprehensive Analytical Engine.
- Cost Benefit Review: detailed cost benefit analysis, including profitability metrics from both the manufacturer and retailer’s perspective, overall event spend, cost per incremental unit (CPIU), payment type and price analysis (average retail vs. list).
- Net Lift Analytics: detailed volume decomposition by event.
- Total Event Spend: total event spend by event.

Reference

Planning Environment

Hierarchy

This worksheet uses the following hierarchy levels:

Levels you can select:	Territory, Retailer, Category, Promotion Group
Levels used in cross tabulation:	Scenario, Promotion

Business Data

View	Series	Purpose
Cost Benefit Review	% Spend	Total plan spend for event excluding slotting divided by total sales during the event
	CPIU	Cost per incremental unit
	Evt Spend	Total Plan Spend for entire promotion
	Evt Status	Promotion status
	Incr Evt $	Incremental $ sales due to the event (gross)
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Rtl Prft	Incremental retailer profit due to promotion, Incr volume* Margin
	Mfg Profit	Manufacturer's profit from the event (gross)
	Pay Type	Payment type agreed upon by manufacturer and retailer, for example, billback, off invoice, or authorized deduction
	Rtl Prft	Retailer Margin*Total event volume
	Ttl Evt $	Total $ sales during the event

View	Series	Purpose
Event Planner	# Wks	Number of weeks of the Event based on the event start and end date
	Base Evt Vol	Projected baseline volume for the duration of the promotion in actual cases
	Buy Dwn	Buy down allowance. May be Off Invoice or Bill back.
	Cons Promo	Consumer overlay
	End Ship	Date shipments will end for the event
	Incr Evt Vol	Incremental event volume based on event base and lift factor (gross)
	Lift	Total volume (including incremental volume from the event), divided by base volume
	Sale Price	The sale price to the consumer.
	Shelf Price	The everyday price to the consumer
	Start Event	Date when promotion starts in stores
	Start Ship	Date product will start to Ship
	Ttl Evt Vol	Event base volume + Incremental volume after taking overrides into account, in actual cases
	Units	Number of units to which promotion applies. This is 1, unless the promotion is a buy-1-get-1-free promotion; then it is 2.
	Veh $	Vehicle costs
	Veh Type	The vehicle type or event type of the promotion.
Fund Allocation	BDF Alloc	Portion of (Total plan spend ex slotting) allotted to BDF
	BDF Alloc %	% of (Total plan spend ex slotting) allocated to BDF.
	Evt Spend exS	Total Plan Spend for entire promotion excluding slotting
	MDF Alloc	Portion of (Total plan spend ex slotting) allotted to MDF
	MDF Alloc %	% of (Total plan spend ex slotting) allocated to MDF. This value is entered by the planner.
Fund Balances	BDF Auth	Authorized Brand development fund = (Base rate + Dev Rate)*volume + Fixed funds (Planning Env)
	BDF Bal	BDF funds remaining = Auth - BDF spent/com
	MDF Auth	Authorized Market development fund = (Base rate + Dev Rate)*volume + Fixed funds (Planning Environment)
	MDF Bal	MDF funds remaining = Auth - MDF spent/com
	Slot Auth	Slotting budget authorized by corporate HQ
	Slot Bal	Slotting authorized - Slotting Spent
	Ttl Fund Auth	Sum of authorized MDF, BDF and slotting fund
	Ttl Fund Bal	MDF bal + BDF bal + Slotting Bal - Unmatched $
	Unmatched $	Trade spend not yet matched to an event. It is included in Exp/com calculation

View	Series	Purpose
Sales Breakdown by Event	Base Evt Vol	Projected baseline volume for the duration of the promotion in actual cases
	Incr Vol	Incremental volume in actual cases
Sales% vs Quota (Base + Viewed Events)	# Wks	Number of weeks of the Event based on the event start and end date
	$ Sales	Annual Dollar sales
	% Attained	Percentage of sales quota attained
	% Spend	Total plan spend for event excluding slotting divided by total sales during the event
	BDF Alloc	Portion of (Total plan spend ex slotting) allotted to BDF
	BDF Alloc %	% of (Total plan spend ex slotting) allocated to BDF.
	BDF Auth	Authorized Brand development fund = (Base rate + Dev Rate)*volume + Fixed funds (Planning Env)
	BDF Bal	BDF funds remaining = Auth - BDF spent/com
	Base Evt Vol	Projected baseline volume for the duration of the promotion in actual cases
	Buy Dwn	Buy down allowance. May be Off Invoice or Bill back.
	Buy Dwn $	BuyDown spend for the promotion
	CPIU	Cost per incremental unit
	Cons Promo	Consumer overlay
	End Ship	Date shipments will end for the event
	Evt Spend	Total Plan Spend for entire promotion
	Evt Spend exS	Total Plan Spend for entire promotion excluding slotting
	Evt Status	Promotion status
	Incr Evt $	Incremental $ sales due to the event (gross)
	Incr Evt Vol	Incremental event volume based on event base and lift factor (gross)
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Rtl Prft	Incremental retailer profit due to promotion, Incr volume* Margin
	Incr Vol	Incremental volume in actual cases
	Is_self	Internal expression
	Lift	Total volume (including incremental volume from the event), divided by base volume
	List Price	List price paid by the retailer, per unit
	MDF Alloc	Portion of (Total plan spend ex slotting) allotted to MDF
	MDF Alloc %	% of (Total plan spend ex slotting) allocated to MDF. This value is entered by the planner.

View	Series	Purpose
Sales% vs Quota (Base + Viewed Events)	MDF Auth	Authorized Market development fund = (Base rate + Dev Rate)*volume + Fixed funds (Planning Environment)
	MDF Bal	MDF funds remaining = Auth - MDF spent/com
	Mfg Profit	Manufacturer's profit from the event (gross)
	Optimized	Indicates whether this promotion is optimized
	Pantry Load $	Amount of money that consumers spend on the product before and after the event (pantry loading)
	Pay Type	Payment type agreed upon by manufacturer and retailer, for example, billback, off invoice, or authorized deduction
	Rtl Prft	Retailer Margin*Total event volume
	Sale Price	The sale price to the consumer.
	Sales Quota	This is used to display quota to the user
	Shelf Price	The everyday price to the consumer
	Slot Auth	Slotting budget authorized by corporate HQ
	Slot Bal	Slotting authorized - Slotting Spent
	Start Event	Date when promotion starts in stores
	Start Ship	Date product will start to Ship
	Ttl Evt $	Total $ sales during the event
	Ttl Evt Vol	Event base volume + Incremental volume after taking overrides into account, in actual cases
	Ttl Fund Auth	Sum of authorized MDF, BDF and slotting fund
	Ttl Fund Bal	MDF bal + BDF bal + Slotting Bal - Unmatched $
	Units	Number of units to which promotion applies. This is 1, unless the promotion is a buy-1-get-1-free promotion; then it is 2.
	Unmatched $	Trade spend not yet matched to an event. It is included in Exp/com calculation
	Veh $	Vehicle costs
	Veh Type	The vehicle type or event type of the promotion.
	incr_vol_no_unplan	Incremental volume in actual cases
Spend Breakdown by Event	Buy Dwn $	BuyDown spend for the promotion
	Veh $	Vehicle costs

PMO: Promotion Comparison

Hierarchy

This worksheet uses the following hierarchy levels:

Levels you can select: Territory, Retailer, Promotion Group

Levels used in cross tabulation: Scenario, Promotion

Business Data

View	Series	Purpose
Cost Benefit Review	% Spend	Total plan spend for event excluding slotting divided by total sales during the event
	Base Evt $	Base event cost: total event cost less incremental event cost
	CPIU	Cost per incremental unit
	Can $ DIr	Direct (internal)
	Evt Spend exS	Total Plan Spend for entire promotion excluding slotting
	Evt Status	Promotion status
	Incr Evt $	Incremental $ sales due to the event (gross)
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Rtl Prft	Incremental retailer profit due to promotion, Incr volume* Margin
	Mfg Profit	Manufacturer's profit from the event (gross)
	Pantry Load $	Amount of money that consumers spend on the product before and after the event (pantry loading)
	Pay Type	Payment type agreed upon by manufacturer and retailer, for example, billback, off invoice, or authorized deduction
	Rtl Prft	Retailer Margin*Total event volume
	Ttl Evt $	Total $ sales during the event

View	Series	Purpose
Event Planner	# Wks	Number of weeks of the Event based on the event start and end date
	Avg Rtl	Average unit retail price at shelf
	Base Evt Vol	Projected baseline volume for the duration of the promotion in actual cases
	Buy Dwn	Buy down allowance. May be Off Invoice or Bill back.
	Cons Promo	Consumer overlay
	End Ship	Date shipments will end for the event
	Incr Evt Vol	Incremental event volume based on event base and lift factor (gross)
	Lift	Total volume (including incremental volume from the event), divided by base volume
	Sale Price	The sale price to the consumer.
	Shelf Price	The everyday price to the consumer
	Start Event	Date when promotion starts in stores
	Start Ship	Date product will start to Ship
	Ttl Evt Vol	Event base volume + Incremental volume after taking overrides into account, in actual cases
	Units	Number of units to which promotion applies. This is 1, unless the promotion is a buy-1-get-1-free promotion; then it is 2.
	Veh $	Vehicle costs
	Veh Type	The vehicle type or event type of the promotion.
Net Lift Analytics	Base Evt $	Base event cost: total event cost less incremental event cost
	Can $ DIr	Direct (internal)
	Incr Evt $ Net	Incremental event profit after accounting for cannibalization and pantry loading
	Pantry Load $	Amount of money that consumers spend on the product before and after the event (pantry loading)
Total Event Spend	Evt Spend exS	Total Plan Spend for entire promotion excluding slotting

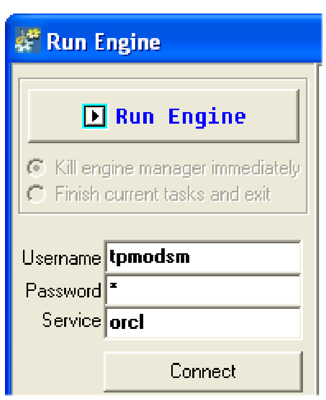
10 PMO: Simulation and Optimization

This chapter describes how to perform simulation and optimization, as part of the PMO business process. It includes the following sections:

Running the Analytical Engine in Batch Mode

Before performing simulation or optimization on a given machine for the first time, run the Analytical Engine on that machine so that it has access to the engine's results***To run the engine in batch mode***

1. Click **Demantra > Demantra Spectrum** *release* **> Engine Administrator**.
2. Click **File > Run Engine**.



3. For **Username** and **Password**, enter the database username and password into which you loaded the dump file (the Demantra Database User).
4. For **Server**, enter the Oracle SID of the database.
5. Click **Run Engine**.

Running Simulations

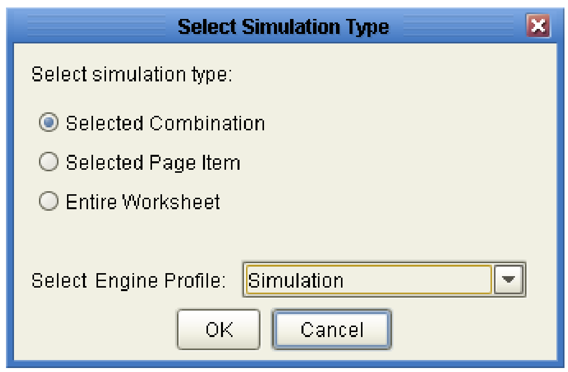
You can run simulations to get an approximate forecast for a promotion.

To run a simulation

1. Make sure the engine process (in Simulation mode) is running on the server. Also note that an error will occur if the Analytical Engine has not been run previously.
2. Run a worksheet. You can run a simulation in any worksheet, but the best worksheet to use for this is the **PMO: Promotion Evaluation** worksheet; see “Evaluating a Promotion” on page 97.
3. Optionally make a change that could affect the forecast.

4. Click **Data > Run Simulation**. Or click the Simulation button.

   The **Select Simulation Type** page appears.



Note The **Select Engine Profile** option is used only if you are using the Promotions Effectiveness Analytical Engine.

5. Select one of the following simulation types:

Option	Generates a simulation for...	Notes
Selected Page Item	Combination that you have currently selected via the Members Browser or selector lists	If a level is on a worksheet axis, these two options are different. Otherwise they are the same.
Selected Combination	Combination that you have currently selected within the worksheet table	
Whole Worksheet	All combinations in the worksheet	This option takes longer to run.

6. If you are using Promotions Effectiveness, select the engine profile that includes the engine settings to use during this simulation run. For details on the engine profiles in your system, contact your Demantra implementor.
7. Do one of the following:
   - Click **OK** to run the simulation.

- Click **Cancel** to close the page without running the simulation.

8. When the simulation is complete, Demantra Spectrum displays a message.
9. Examine the results.
10. Do one of the following:
    - To accept the results, click **Data > Accept Simulation.** Demantra Spectrum copies the data from the **Simulation** series into the **Sales Forecast** series, where they are visible to other users.
    - To reject the results, click **Data > Reject Simulation.** Demantra Spectrum clears the data from the **Simulation** series.

      (The other series, such as **Brand Switching**, are left alone; they will be overwritten when the Analytical Engine next runs.)

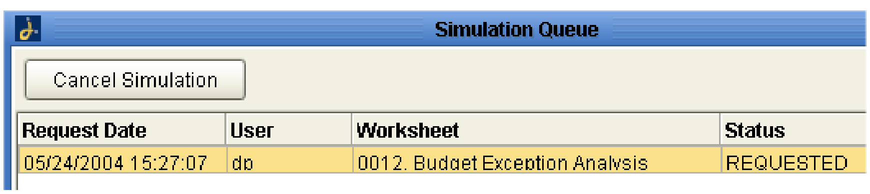
Checking the Simulation Queue

When you start a simulation, Demantra Spectrum adds it to an internal queue, which processes all simulations in the order they are submitted. You can view this queue and you can cancel a simulation that you submitted.

To check the simulation queue

1. Click **Data > Simulation Queue.**

   Demantra Spectrum displays the following dialog box:



The **Status** field indicates the status of each simulation request. The status can be one of the following:

Requested	A user has submitted this simulation request, which has not yet started running.
Running	Demantra Spectrum is performing this simulation.
Completed	Demantra Spectrum has completed this simulation successfully.
Stopping	A user asked to cancel this simulation request, which Demantra Spectrum has not yet fully canceled.
Stopped	A user has canceled this simulation request and Demantra Spectrum has fully canceled it.
Failed	Demantra tried to run this simulation, but an error occurred.

Canceling a Simulation

To cancel a simulation

1. Click **Data > Simulation Queue.**
2. Click simulation and then click **Cancel Simulation**.

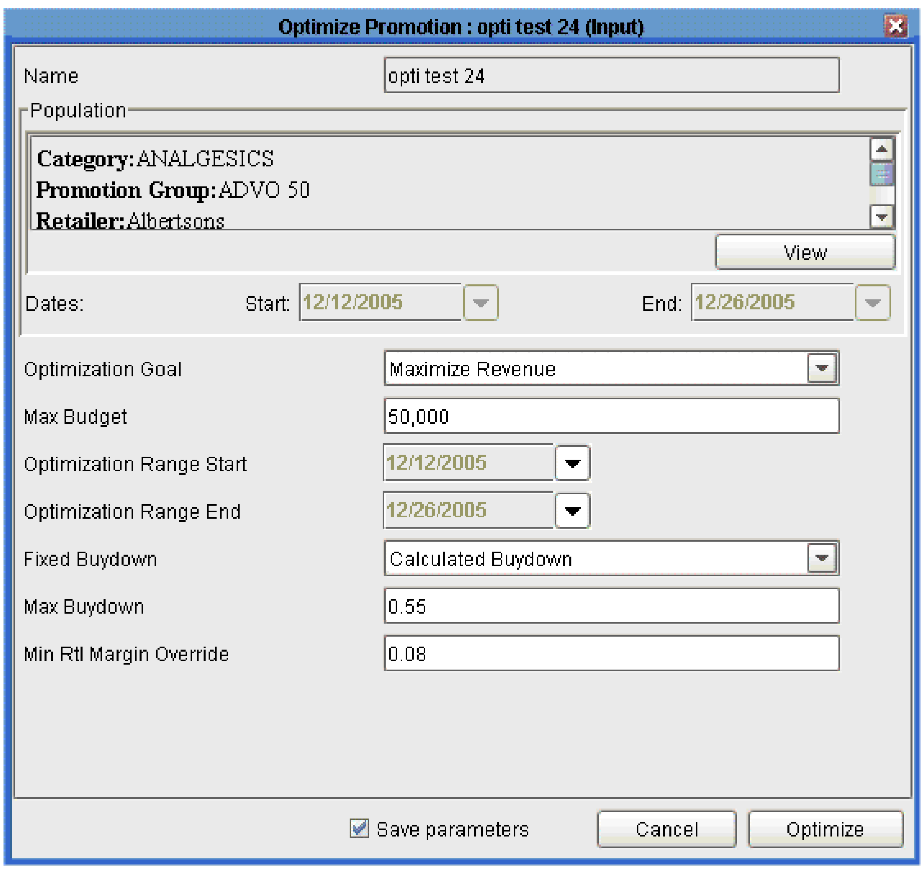
Optimizing a Promotion

You can optimize any future promotion, in any worksheet that displays promotions. For example, you can start in the **Planning Environment** worksheet; see “Introduction to the Planning Environment” on page 72.

To optimize a promotion

1. Make sure that you have entered a sale price for the item and location.
2. Right-click a promotion and click **Methods > Optimize**.

   TPMO displays the following dialog box:



3. Specify values for the following parameters:

Optimization Goal	Select one of the following goals for this promotion: • **Maximize Revenue** • **Maximize Profit** • **Maximize Units**
Max Budget	Maximum allowed budget for this promotion.
Optimization Range Start, Optimization Range End	By default, Promotion Optimization assumes that you want the optimized promotion to fall within the span of time of the original promotion. If you want Promotion Optimization to search for a better time for this promotion, use these parameters to specify the range of time for optimization to consider.
Fixed Buydown	Specify whether Promotion Optimization should use the buydown that you have already entered or calculate an optimal buydown for this promotion.
Max Buydown	Maximum allowed buydown for this promotion. If Promotion Optimization calculates an optimal buydown, the buydown will not exceed this value.
Min Rtl Margin Override	Minimum margin that the retailer must make on this promotion. By default, Promotion Optimization considers the retailer’s default required minimum margin. Use this parameter to override that value, if needed. Use a value greater than 0 and less than or equal to 1.

4. Click **Optimize**.

Now the system will select the promotion parameters (sale price, vehicle type, and so on) that best meet your goal. This is a huge time saver because you do not have have to go through all the possible permutations of each promotion in order to find the best one.

In order to view the proposed promotion, you use the **PMO: Optimization Comparison** worksheet; see the next section.

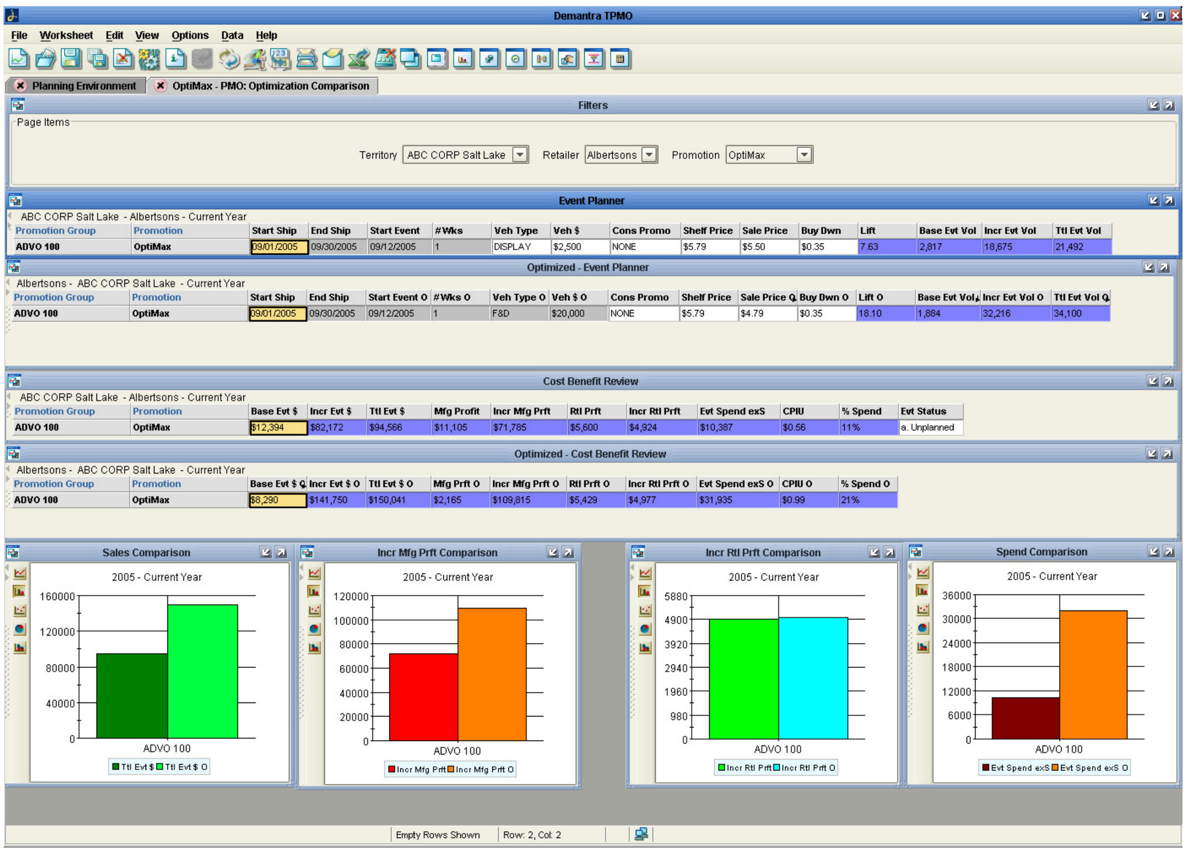
Viewing Optimization Results

The **PMO: Optimization Comparison** worksheet provides the capability to simultaneously view and compare the results of a promotion before and after running optimization.

To view optimization results

1. Right-click a promotion that you have optimized and click **Open With > PMO: Optimization Comparison**.

   The system displays the following:



The **PMO: Optimization Comparison** worksheet contains the following information:

- **Event Planner:** details of the events, including start and end ship dates, vehicle type, vehicle cost, buydown, base volume and incremental volume. Incremental volume is generated by Demantra's comprehensive analytical engine.
- **Optimized - Event Planner:** details of the event as a result of running optimization. The values are given right below the original values of the promotion to facilitate easy comparison.
- **Cost Benefit Review:** Detailed cost benefit analysis, including profitability metrics from both the manufacturer and retailer's perspective, overall event

spend, cost per incremental unit (CPIU), payment type and price analysis (average retail vs. list).

- **Optimized - Cost Benefit Review**: Detailed cost benefit analysis as a result of running optimization.
- **Sales Comparison:** Graphical comparison of the total event dollars generated before and after optimization.
- **Incr Mfg Prft Comparison:** Graphical comparison of the Incremental Manufacturing Profit generated before and after optimization.
- **Incr Rtl Prft Comparison:** Graphical comparison of the incremental retailer profit generated before and after running optimization
- **Spend Comparison:** Graphical comparison of event spend before and after running optimization.

Accepting an Optimized Promotion

After you optimize a promotion, you can accept it. You can do this in any worksheet that displays promotions. For example, you can start in the **PMO: Optimization Comparison** worksheet; see “Viewing Optimization Results” on page 92.

Note This action has no effect on a promotion that has not been optimized.

To accept an optimized promotion

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

   If you accept the optimization, the attributes of the optimized promotion are copied into the original promotion.

2. Once satisfied with the results, you can add this promotion to your current plan simply by changing the status to **planned**.

The system also takes a snapshot of the promotion at this stage for use as a baseline.

Reference

PMO: Optimization Comparison

Hierarchy

This worksheet uses the following hierarchy levels:

Levels you can select:	Territory, Retailer, Promotion
Levels used in cross tabulation:	Promotion Group, Scenario

Business Data

View	Series	Purpose
Cost Benefit Review	% Spend	Total plan spend for event excluding slotting divided by total sales during the event
	Base Evt $	Base event cost: total event cost less incremental event cost
	CPIU	Cost per incremental unit
	Evt Spend exS	Total Plan Spend for entire promotion excluding slotting
	Evt Status	Promotion status
	Incr Evt $	Incremental $ sales due to the event (gross)
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Rtl Prft	Incremental retailer profit due to promotion, Incr volume* Margin
	Mfg Profit	Manufacturer's profit from the event (gross)
	Rtl Prft	Retailer Margin*Total event volume
	Ttl Evt $	Total $ sales during the event

View	Series	Purpose
Event Planner	# Wks	Number of weeks of the Event based on the event start and end date
	Base Evt Vol	Projected baseline volume for the duration of the promotion in actual cases
	Buy Dwn	Buy down allowance. May be Off Invoice or Bill back.
	Cons Promo	Consumer overlay
	End Ship	Date shipments will end for the event
	Incr Evt Vol	Incremental event volume based on event base and lift factor (gross)
	Lift	Total volume (including incremental volume from the event), divided by base volume
	Sale Price	The sale price to the consumer.
	Shelf Price	The everyday price to the consumer
	Start Event	Date when promotion starts in stores
	Start Ship	Date product will start to Ship
	Ttl Evt Vol	Event base volume + Incremental volume after taking overrides into account, in actual cases
	Veh $	Vehicle costs
	Veh Type	The vehicle type or event type of the promotion.
Incr Mfg Prft Comparison	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Mfg Prft O	Incremental profit to the manufacturer due to the promotion (gross), computed by optimization
Optimized - Cost Benefit Review	% Spend O	Total plan spend for event excluding slotting divided by total sales during the event, calculated as a result of optimization
	Base Evt $ O	Base event cost computed by Optimization: total event cost less incremental event cost
	CPIU O	Cost per incremental unit
	Evt Spend exS O	Total Plan Spend for entire promotion excluding slotting, after optimization
	Incr Evt $ O	Incremental $ sales due to the event (gross), after optimization
	Incr Mfg Prft O	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Rtl Prft O	Incremental retailer profit due to promotion, Incr volume* Margin, after optimization
	Mfg Prft O	Manufacturer's profit from the event (gross)
	Rtl Prft O	Retailer Margin*Total event volume
	Ttl Evt $ O	Total $ sales during the event

View	Series	Purpose
Optimized - Event Planner	# Wks O	Number of weeks of the Event based on the event start and end date
	Base Evt Vol O	Projected baseline volume for the duration of the promotion in actual cases
	Buy Dwn O	Buy down allowance. May be Off Invoice or Bill back.
	Cons Promo	Consumer overlay
	End Ship	Date shipments will end for the event
	Incr Evt Vol O	Incremental event volume after Optimization
	Lift O	Total volume (including incremental volume from the event), divided by base volume, computed by Optimization
	Sale Price O	The sale price to the consumer, as suggested by Optimization
	Shelf Price	The everyday price to the consumer
	Start Event O	Date when promotion starts in stores
	Start Ship	Date product will start to Ship
	Ttl Evt Vol O	Event base volume + Incremental volume after taking overrides into account, in actual cases
	Veh $ O	Vehicle costs
	Veh Type O	The vehicle type as a result of Optimization
Incr Rtl Prft Comparison	Incr Rtl Prft	Incremental retailer profit due to promotion, Incr volume* Margin
	Incr Rtl Prft O	Incremental retailer profit due to promotion, Incr volume* Margin, after optimization
Sales Comparison	Ttl Evt $	Incremental $ sales due to the event (gross)
	Ttl Evt $ O	Incremental $ sales due to the event (gross), after optimization
Spend Comparison	Evt Spend exS	Total Plan Spend for entire promotion excluding slotting
	Evt Spend exS O	Total Plan Spend for entire promotion excluding slotting, after optimization

11 PMO: Reviewing Past Performance

Base functionality for promotion evaluation exists in Demantra's TPM application. The difference is a lower level of detail is made available (no lift decomposition functionality). The details described here are associated with the more advanced PMO module.

Evaluating a Promotion

Once a promotion has been planned and executed, it is useful to evaluate its performance against your original plan. The **PMO: Promotion Evaluation** worksheet provides a detailed post-promotional analysis of each individual promotion. (i.e. compare forecast to actual performance).

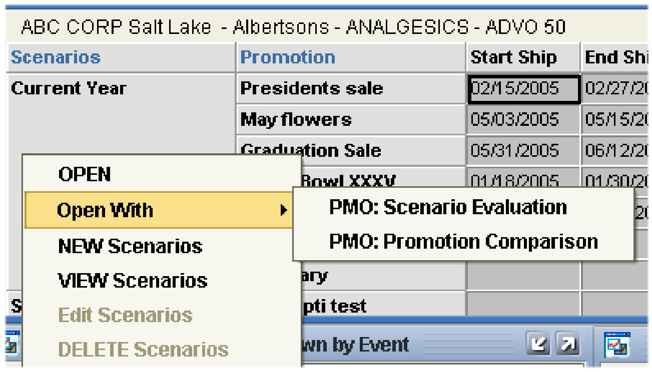
You can view the breakdown of each event with respect to the sales dollars and profit generated for the manufacturer. Depending on the detail of the historical data, a lift decomposition can be provided showing promotional effects such as:

- Cannibalization (positive or negative) you have
- Pre and post effects, such as pantry loading

This will enable you to see your true "net lift" and revised financial figures in order to properly evaluate the event's performance and uncover its true profitability.

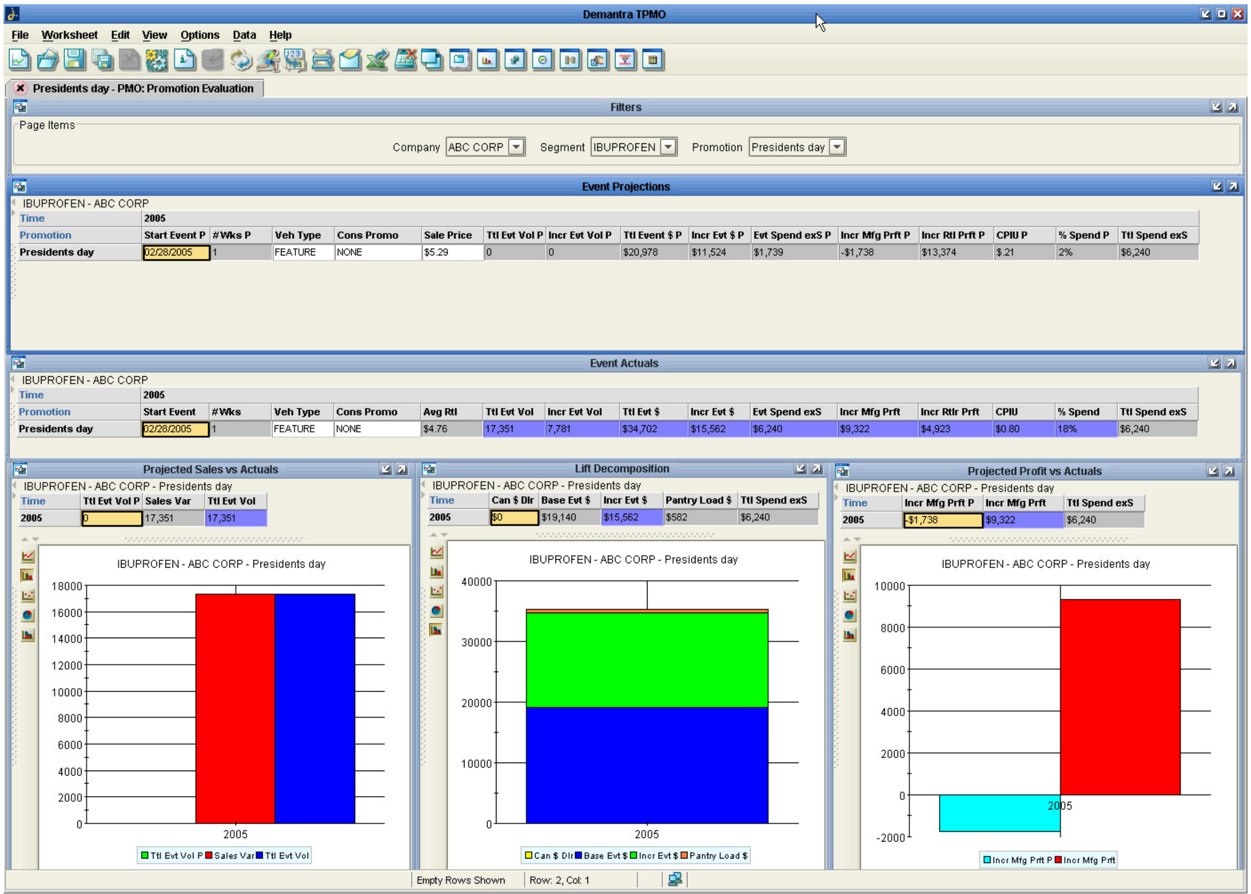
To evaluate a past promotion

1. You typically start in the **Planning Environment**; see “Introduction to the Planning Environment” on page 72.
2. In the **Event Planner** window, right-click a promotion and click **Open With > PMO: Promotion Evaluation**.



3. If the worksheet does not show data immediately, click **Data** > **Rerun**. Or click the Run button.

The system displays the **PMO: Promotion Evaluation** worksheet, filtered to display just the promotion that you right-clicked.



The **PMO: Promotion Evaluation** worksheet includes:

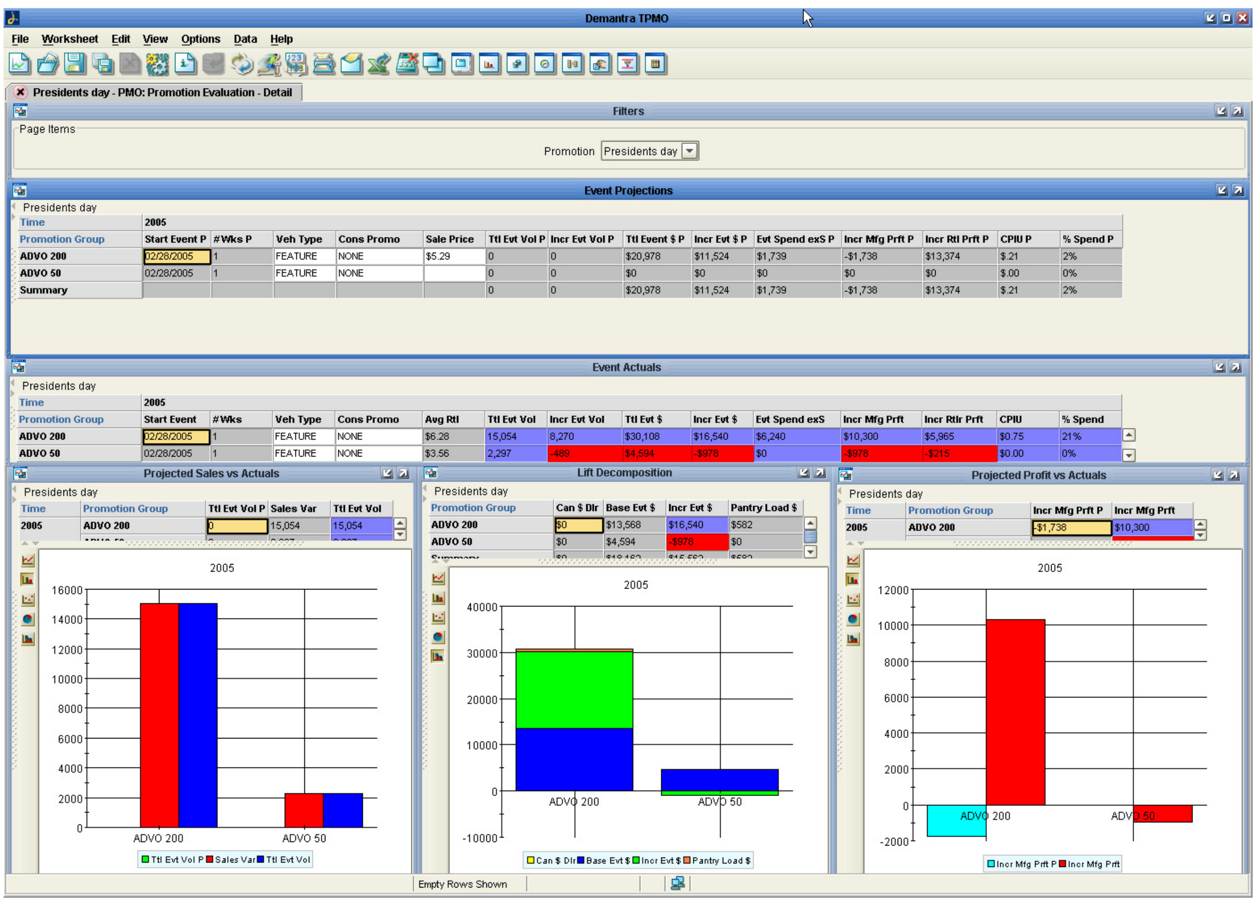
- Event Projections – planned event details, including event start, vehicle type, total planned volume, anticipated manufacturer and retailer profit, as well as anticipated spend.
- Event Actuals – actual event volume, actual manufacturer and retailer profit, total event spend
- Projected Sales vs. Actuals – graph summarizing planned vs. actual sales
- Lift Decomposition – breakdown of event volume into base volume, incremental lift (i.e. direct lift) and pantry loading
- Projected Profit vs. Actuals – comparison of anticipated profits vs. actuals

Reviewing More Details of a Past Promotion

Once in the promotion evaluation screen, you can get further detail about the impact of the promotion by moving to the **PMO: Promotion Evaluation - Detail** worksheet. This report will show the lift decomposition in much more detail, showing the actual cannibalization for the promoted item as well as the impact it had on other items within a user's franchise.

To view more details for a past promotion

1. You typically start in the **PMO: Promotion Evaluation** worksheet; see "Evaluating a Promotion" on page 97.
2. Right-click a promotion and click **Open With > PMO: Promotion Evaluation - Detail**.



The **PMO: Promotion Evaluation - Detail** worksheet includes:

- **Event Projections** – planned event details, including event start, vehicle type, total planned volume, anticipated manufacturer and retailer profit, as well as anticipated spend.
- **Event Actuals** – actual event volume, actual manufacturer and retailer profit, total event spend
- **Projected Sales vs. Actuals** – graph summarizing planned vs. actual sales

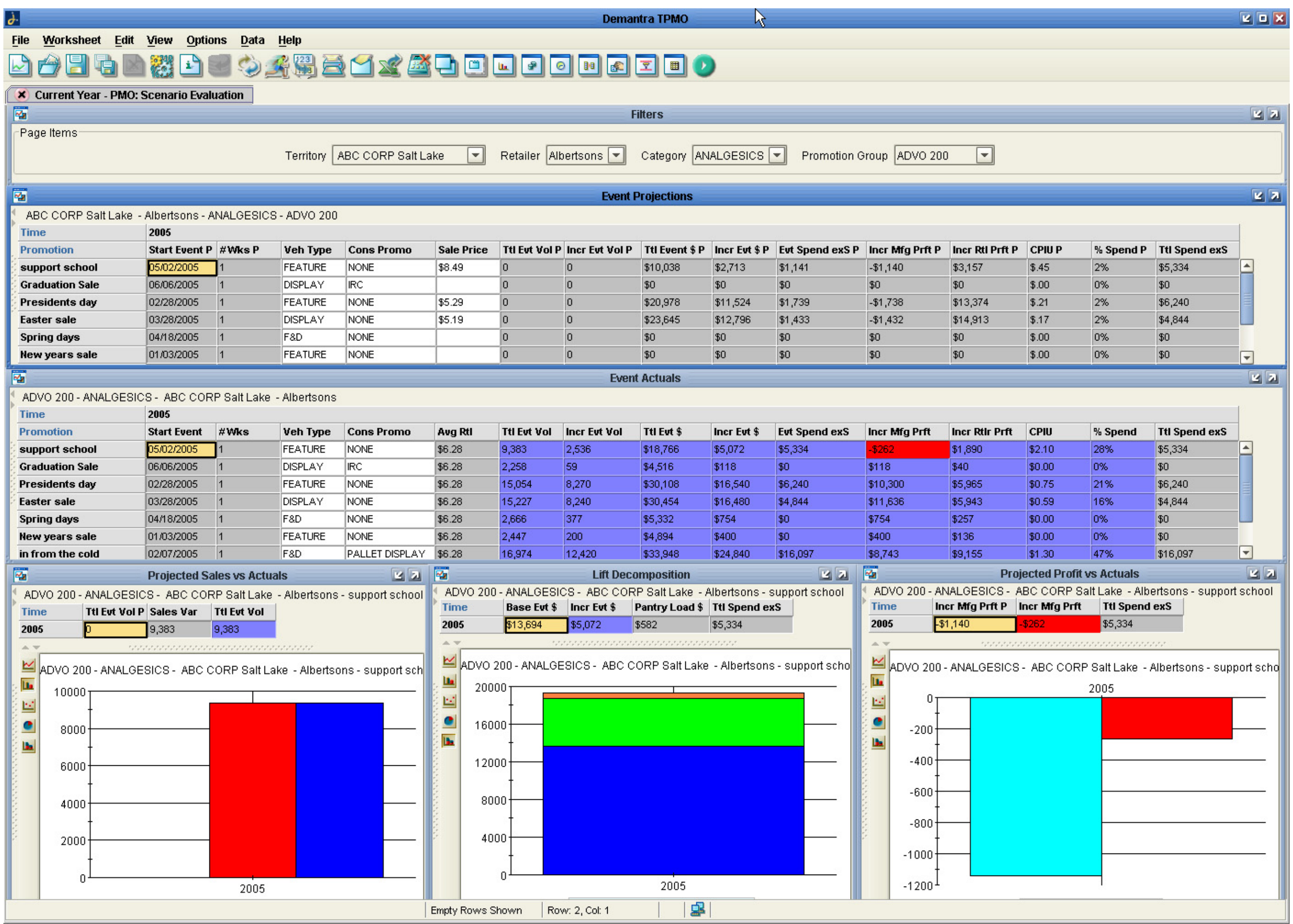
- **Lift Decomposition** – breakdown of event volume into base volume, incremental lift (i.e. direct lift) and pantry loading
- **Projected Profit vs. Actuals** – comparison of anticipated profits vs. actuals

Evaluating a Scenario

The **PMO: Scenario Evaluation** worksheet is intended to provide an overview of historical promotions by territory, retailer, category and promotion group, allowing for a detailed analysis of how all events within a category performed to plan. Demantra's **PMO: Scenario Evaluation** worksheet provides all this detailed information in one place, making it easy to analyze and assess the effectiveness of a promotional scenario.

To evaluate the promotions in a scenario

1. You typically start in the **Planning Environment**; see "Introduction to the Planning Environment" on page 72.
2. In the **Event Planner** window, right-click a scenario and click **Open With > PMO: Scenario Evaluation**.



The **PMO: Scenario Evaluation** worksheet displays the following information for the promotions in this scenario:

- **Event Projections** – planned event details, including event start, vehicle type, total planned volume, anticipated manufacturer and retailer profit, as well as anticipated spend.
- **Event Actuals** – actual event volume, actual manufacturer and retailer profit, total event spend
- **Projected Sales vs. Actuals** – graph summarizing planned vs. actual sales
- **Lift Decomposition** – breakdown of event volume into base volume, incremental lift (i.e. direct lift) and pantry loading
- **Projected Profit vs. Actuals** – comparison of anticipated profits vs. actuals

Reference

PMO: Promotion Evaluation

Hierarchy

This worksheet uses the following hierarchy levels:

Levels you can select:	Company, Segment, Promotion
Levels used in cross tabulation:	None

Business Data

View	Series	Purpose
Event Actuals	# Wks	Number of weeks of the Event based on the event start and end date
	% Spend	Total plan spend for event excluding slotting divided by total sales during the event
	Avg Rtl	Average unit retail price at shelf
	CPIU	Cost per incremental unit
	Cons Promo	Consumer overlay
	Evt Spend exS	Total Plan Spend for entire promotion excluding slotting
	Incr Evt $	Incremental $ sales due to the event (gross)
	Incr Evt Vol	Incremental event volume based on event base and lift factor (gross)
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Rtl Prft	Incremental retailer profit due to promotion, Incr volume* Margin
	Start Event	Date when promotion starts in stores
	Ttl Evt $	Total $ sales during the event
	Ttl Evt Vol	Event base volume + Incremental volume after taking overrides into account, in actual cases
	Veh Type	The vehicle type or event type of the promotion.

View	Series	Purpose
Event Projections	# Wks P	Projected length of event, in weeks
	% Spend P	Projected total plan spend for event excluding slotting divided by total sales during the event
	CPIU P	Projected cost per incremental unit
	Cons Promo	Consumer overlay
	Evt Spend exS P	Projecte total plan spend for entire promotion excluding slotting
	Incr Evt $ P	Projected incremental $ sales due to the event (gross)
	Incr Evt Vol P	Projected incremental event volume based on event base and lift factor (gross)
	Incr Mfg Prft P	Projected incremental profit to the manufacturer due to the promotion (gross)
	Incr Rtl Prft P	Projected incremental retailer profit due to promotion, Incr volume* Margin
	Sale Price	The sale price to the consumer.
	Start Event P	Projected start of the event
	Ttl Event $ P	Projected total $ sales during the event
	Ttl Evt Vol P	Projected event base volume + Incremental volume after taking overrides into account, in actual cases
	Veh Type	The vehicle type or event type of the promotion.
Lift Decomposition	Base Evt $	Base event cost: total event cost less incremental event cost
	Can $ DIr	Direct (internal)
	Incr Evt $	Incremental $ sales due to the event (gross)
	Pantry Load $	Amount of money that consumers spend on the product before and after the event (pantry loading)
Projected Profit vs Actuals	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Mfg Prft P	Projected incremental profit to the manufacturer due to the promotion (gross)
Projected Sales vs Actuals	Sales Var	Variance between Ttl Evt Vol and Ttl Evt Vol P
	Ttl Evt Vol	Event base volume + Incremental volume after taking overrides into account, in actual cases
	Ttl Evt Vol P	Projected event base volume + Incremental volume after taking overrides into account, in actual cases

PMO: Promotion Evaluation - Detail

Hierarchy

This worksheet uses the following hierarchy levels:

Levels you can select: Promotion

Levels used in cross tabulation: Promotion Group

Business Data

View	Series	Purpose
Event Actuals	# Wks	Number of weeks of the Event based on the event start and end date
	% Spend	Total plan spend for event excluding slotting divided by total sales during the event
	Avg Rtl	Average unit retail price at shelf
	CPIU	Cost per incremental unit
	Cons Promo	Consumer overlay
	Evt Spend exS	Total Plan Spend for entire promotion excluding slotting
	Incr Evt $	Incremental $ sales due to the event (gross)
	Incr Evt Vol	Incremental event volume based on event base and lift factor (gross)
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Rtl Prft	Incremental retailer profit due to promotion, Incr volume* Margin
	Start Event	Date when promotion starts in stores
	Ttl Evt $	Total $ sales during the event
	Ttl Evt Vol	Event base volume + Incremental volume after taking overrides into account, in actual cases
	Veh Type	The vehicle type or event type of the promotion.

View	Series	Purpose
Event Projections	# Wks P	Projected length of promotion, in weeks
	% Spend P	Projected total plan spend for event excluding slotting divided by total sales during the event
	CPIU P	Projected cost per incremental unit
	Cons Promo	Consumer overlay
	Evt Spend exS P	Projected Total Plan Spend for entire promotion excluding slotting
	Incr Evt $ P	Projected incremental $ sales due to the event (gross)
	Incr Evt Vol P	
	Incr Mfg Prft P	Projected incremental profit to the manufacturer due to the promotion (gross)
	Incr Rtl Prft P	Projected incremental retailer profit due to promotion, Incr volume* Margin
	Sale Price	The sale price to the consumer.
	Start Event P	Projected start of the event
	Ttl Event $ P	Projected total $ sales during the event
	Ttl Evt Vol P	Projected event base volume + Incremental volume after taking overrides into account, in actual cases
	Veh Type	The vehicle type or event type of the promotion.
Lift Decomposition	Base Evt $	Base event cost: total event cost less incremental event cost
	Can $ DIr	Direct (internal)
	Incr Evt $	Incremental $ sales due to the event (gross)
	Pantry Load $	Amount of money that consumers spend on the product before and after the event (pantry loading)
Projected Profit vs Actuals	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Mfg Prft P	Projected incremental profit to the manufacturer due to the promotion (gross)
Projected Sales vs Actuals	Sales Var	Variance between Ttl Evt Vol and Ttl Evt Vol P
	Ttl Evt Vol	Event base volume + Incremental volume after taking overrides into account, in actual cases
	Ttl Evt Vol P	Projected event base volume + Incremental volume after taking overrides into account, in actual cases

PMO: Scenario Evaluation

Hierarchy

This worksheet uses the following hierarchy levels:

Levels you can select:	Territory, Retailer, Category, Promotion Group
Levels used in cross tabulation:	Promotion

Business Data

View	Series	Purpose
Event Actuals	# Wks	Number of weeks of the Event based on the event start and end date
	% Spend	Total plan spend for event excluding slotting divided by total sales during the event
	Avg Rtl	Average unit retail price at shelf
	Base Evt $	Base event cost: total event cost less incremental event cost
	CPIU	Cost per incremental unit
	Cons Promo	Consumer overlay
	Evt Spend exS	Total Plan Spend for entire promotion excluding slotting
	Incr Evt $	Incremental $ sales due to the event (gross)
	Incr Evt Vol	Incremental event volume based on event base and lift factor (gross)
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Rtl Prft	Incremental retailer profit due to promotion, Incr volume* Margin
	Pantry Load $	Amount of money that consumers spend on the product before and after the event (pantry loading)
	Sale Price	The sale price to the consumer.
	Start Event	Date when promotion starts in stores
	Ttl Evt $	Total $ sales during the event
	Ttl Evt Vol	Event base volume + Incremental volume after taking overrides into account, in actual cases
	Veh Type	The vehicle type or event type of the promotion.

View	Series	Purpose
Event Projections	# Wks	Number of weeks of the Event based on the event start and end date
	% Spend	Total plan spend for event excluding slotting divided by total sales during the event
	% Spend P	Projected total plan spend for event excluding slotting divided by total sales during the event
	Avg Rtl	Average unit retail price at shelf
	Base Evt $	Base event cost: total event cost less incremental event cost
	CPIU	Cost per incremental unit
	CPIU P	Projected cost per incremental unit
	Cons Promo	Consumer overlay
	Evt Spend exS	Total Plan Spend for entire promotion excluding slotting
	Evt Spend exS P	Projected total plan spend for entire promotion excluding slotting
	Incr Evt $	Incremental $ sales due to the event (gross)
	Incr Evt $ P	Projected incremental $ sales due to the event (gross)
	Incr Evt Vol	IncremIncremental $ sales due to the event (gross) ental event volume based on event base and lift factor (gross)
	Incr Evt Vol P	Projected incremental event volume based on event base and lift factor (gross)
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Mfg Prft P	Projected incremental profit to the manufacturer due to the promotion (gross)
	Incr Rtl Prft	Incremental retailer profit due to promotion, Incr volume* Margin
	Incr Rtl Prft P	Projected incremental retailer profit due to promotion, Incr volume* Margin
	Pantry Load $	Amount of money that consumers spend on the product before and after the event (pantry loading)
	Sale Price	The sale price to the consumer.
	Start Event P	Projected start of the event
	Ttl Event $ P	Projected total $ sales during the event
	Ttl Evt $	Total $ sales during the event
	Ttl Evt Vol	Event base volume + Incremental volume after taking overrides into account, in actual cases
	Ttl Evt Vol P	Projected event base volume + Incremental volume after taking overrides into account, in actual cases
	Veh Type	The vehicle type or event type of the promotion.

View	Series	Purpose
Lift Decomposition	Base Evt $	Base event cost: total event cost less incremental event cost
	Incr Evt $	Incremental $ sales due to the event (gross)
	Pantry Load $	Amount of money that consumers spend on the product before and after the event (pantry loading)
Projected Profit vs Actuals	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion (gross)
	Incr Mfg Prft P	Projected incremental profit to the manufacturer due to the promotion (gross)
Projected Sales vs Actuals	Sales Var	Variance between Ttl Evt Vol and Ttl Evt Vol P
	Ttl Evt Vol	Event base volume + Incremental volume after taking overrides into account, in actual cases
	Ttl Evt Vol P	Projected event base volume + Incremental volume after taking overrides into account, in actual cases

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