Oracle® Demantra Predictive Trade Planning

User's Guide

Release 7.3

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Preface

Intended Audience

Welcome to Release 7.3 of the *Oracle Demantra Predictive Trade Planning User's Guide.*

See Related Information Sources on page xii for more Oracle E-Business Suite product information.

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Structure

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7 PMO: Planning Promotions

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

8 PMO: Promotion Calendars
9 PMO: Simulation and Optimization

Related Information Sources

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Part 1

Introduction and Basics

1

PTP Introduction

This chapter covers the following topics:

- Overview
- Dashboard: Collaborator Workbench
- Predictive Trade Planning Business Processes and Worksheets
- Promotion Modeling and Optimization Business Processes and Worksheets
- Forecasting and Simulation
- Optimization

Overview

Oracle Demantra's Predictive Trade Planning and Trade Promotion Optimization applications provide a complete Predictive Trade Planning (PTP) solution, is a powerful combination of a financial application to manage retailer trade funds coupled with a comprehensive promotion analysis tool specifically targeted at manufacturers for the purpose of better planning trade funds usage. The application considers sales, point of sale (POS), and syndicated data to provide advanced pre and post promotion analysis:

- Historical event evaluation, including detailed analysis of lift components, taking into account both direct and indirect effects

- Base volume forecast by item over time based on past history

- Event planning

- Incremental volume forecast based on user-defined promotional variables and causals (by product, time, price, vehicle, buydown, and so on)

- Detailed fund analysis, including quota versus actuals

- Event optimization taking into consideration a variety of constraints (time, budget,

spend, number of events, and so on)

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

Dashboard: Collaborator Workbench

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

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

For details, see Opening Worksheets, page 4-9.

See also *Oracle Demantra Users Guide*.

Predictive Trade Planning Business Processes and Worksheets

For PTP business processes, you start in the Collaborator Workbench and launch any of the PTP worksheets. The following diagram shows the overall workflow:
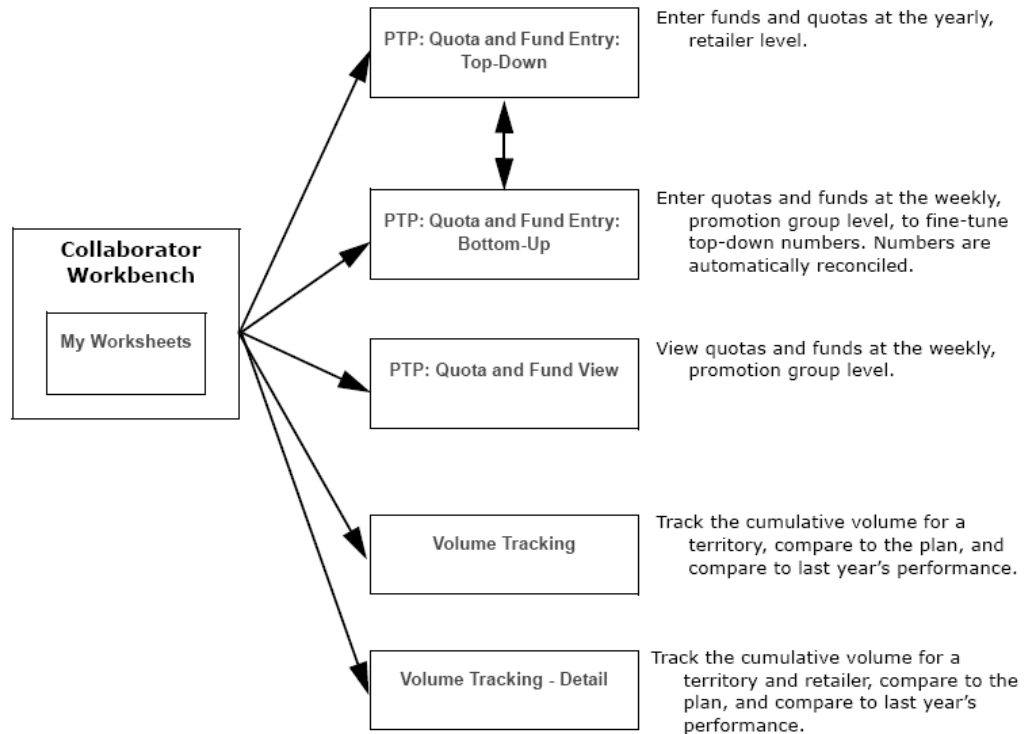
PTP includes the following worksheets:

- PTP: Quota and Fund Entry: Top-Down allows headquarters to manage funds, including fund rates and fixed funds as well as sales quotas, at a fairly high level (yearly, for retailers and territories). PTP provides the following standard set of promotion funds: Brand Development Funds (BDF), Market Development Funds (MDF), and slotting funds. In turn, both BDF and MDF include a fixed portion (for fixed funds) and a volume-dependent portion, per common practice.

- PTP: Quota and Fund Entry: Bottom-Up is provided to help you fine-tune quotas and funds, by displaying their breakout, weekly, by promotion group. You can edit values at this level and they are automatically rolled up to the higher level. At all times, upper-level and lower-level numbers are automatically reconciled.

- PTP: Quota and Fund View is a read-only version of the bottom-up entry worksheet. It allows you to view authorized funds against your sales quota.

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

- Volume Tracking - Detail is similar to Volume Tracking, but allows you to drill

down to the retailer level.

For details, see PTP: Managing and Viewing Quotas and Funds and PTP: Tracking Volume.

Promotion Modeling and Optimization Business Processes and Worksheets

For PMO business processes, you generally start in the Collaborator Workbench, and then open the Planning Environment worksheet. From there, you right-click a promotion and launch any of the PMO worksheets to see data for that promotion. Or, to compare multiple promotions, you right-click a scenario and launch a worksheet to view the promotions in that scenario side-by-side. From within an open worksheet, you can also launch a different worksheet, to look at the same promotion in a different way.

The following diagram shows the overall workflow:
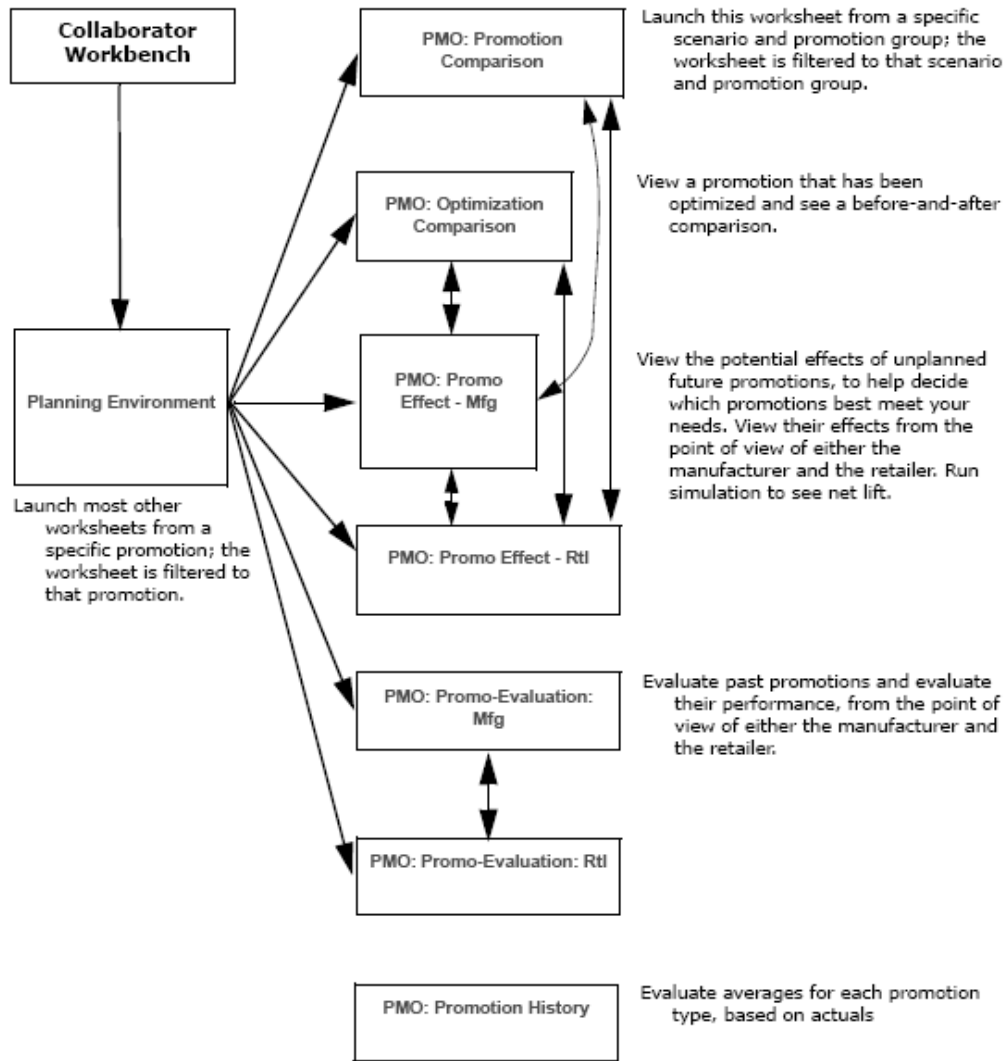
PMO includes the following worksheets:

- Planning Environment 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. The Planning Environment provides all this critical information in one place. See PMO: Planning Promotions - Introduction to the Planning Environment, page 7-1.

- PMO: Promo Effect - Mfg display the effects of future promotions, to show the impact on volume and spending, as well as a breakdown of the event with respect to the sales dollars and profit generated for the manufacturer. See PMO: Examining and Comparing Promotions - Examining Promotions from the Manufacturer's Point of View, page 10-2.

- PMO: Promo Effect - Rtl is similar to the previous worksheet, but shows the breakout of cannibalizing effects as a retailer would view them.

- PMO: Promotion Comparison helps you compare and evaluate multiple promotions in a scenario, so that you can determine how best to spend trade dollars. Typically you create multiple potential promotions in the Sandbox and compare them side by side here. See PMO: Examining and Comparing Promotions - Comparing Promotions in a Scenario, page 10-8

- 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 re-optimize the promotion. Once satisfied with the results of a promotion, you can add it to your current plan. See PMO: Simulation and Optimization - Overview, page 10-2.

- PMO: Promo-Evaluation: Mfg and PMO: Promo-Evaluation: Rtl provide a detailed post-promotional analysis of each individual promotion (by compare forecast to actual performance), from the manufacturer's point of view and the retailer's point of view, respectively. Here, you can view the breakdown of each event with respect to the sales dollars and profit generated for the manufacturer and retailer. See

  - PMO: Reviewing Past Performance- Evaluating Performance from the Manufacturer's Point of View, page 11-2.

  - PMO: Reviewing Past Performance- Evaluating Performance from the Retailer's Point of View, page 11-5.

- PMO: Promotion History displays the past averages for each promotion type, in a number of different contexts. See PMO: Reviewing Past Performance - Overview, page 11-1.

Forecasting and Simulation

Typically, the Analytical Engine is run periodically in batch mode, perhaps weekly, to generate a forecast for all items and locations in the system. The forecast data includes total volume, base volume (volume in the absence of promotions), pre- and post-promotional volume, and volume due to cannibalization. This forecast, including the detailed breakdown of promotional effects, is available for future dates and for the past—so that you can better understand promotions that have already run.

Running the Analytical Engine in batch mode may take hours, depending on the volume of data, so PTP also provides the ability to run simulations. You can run a simulation quickly, see the results, and accept or reject them.

A simulation generates a forecast for a much smaller set of data, typically a single promotion, and provides immediate data for the total volume, base volume (volume in the absence of promotions), pre- and post-promotional volume. Depending on where

you perform a simulation, you may also be able to see cannibalization; this depends on whether the worksheet contains all the data that the Analytical Engine needs to find cannibalization effects.

Optimization

The effectiveness of a promotion depends on many factors, as noted earlier. To help you find the most effective promotion for your needs, PTP provides the ability to optimize a promotion.

The Promotion Optimization module uses the previously stored results of the Analytical Engine and information about past variations in the promotions. You provide a specific goal (optimizing units, revenue, or profit) and constraints (such as minimum retailer margin), and the optimizer determines the best set of promotion properties.

Optimize Promotion : opti test 24 (Input)

Name: opti test 24

Population

Category: ANALGESICS
Promotion Group: ADVO 50
Retailer: Albertsons

[View]

Dates: Start: 12/12/2005   End: 12/26/2005

Optimization Goal	Maximize Revenue
Max Budget	50,000
Optimization Range Start	12/12/2005
Optimization Range End	12/26/2005
Fixed Buydown	Calculated Buydown
Max Buydown	0.55
Min Rtl Margin Override	0.08

☑ Save parameters   [Cancel]   [Optimize]

2

Predictive Trade Planning Concepts

This chapter covers the following topics:

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

Worksheet Basics

This section provides a closer look at the basic data elements in worksheets, introduced previously in "Tutorial: Getting Acquainted with Worksheets."

Levels (Segmentation)

A level lets you aggregate or group data in a worksheet.
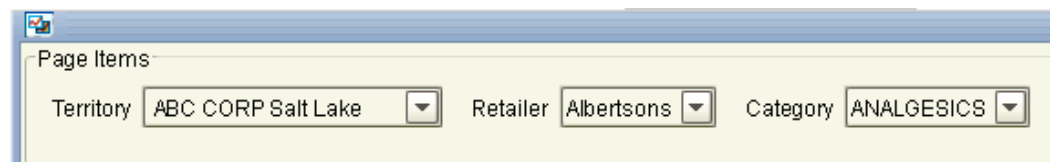
For example, if you select a territory, then a retailer, and then a product category to display, the data in the rest of the worksheet is aggregated across this territory, retailer, and category.

Oracle Demantra uses several different kinds of levels:

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

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

- Promotion levels correspond to promotional events.

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

Series (Measures)

A worksheet table or graph displays series data associated with the current selection.

T1-World Brands Comb - Albertsons - ANALGESICS - EXEDRA 100										
Scenarios	Promotion	Start Ship	End Ship	Start Event	# Wks	Veh Type	Veh $	Cons Promo	Shelf Price	Sale Price
Sandbox	Test Opti Scen			04/03/2006	4	FEATURE	$20,000	N/A	$5.89	$4.19
	Test New promotion			02/08/2006	2	FEATURE	$8,000	N/A	$5.89	$5.39
	Test Past End Date			01/09/2006	1	F&D	$0	N/A	$5.89	$0.00
	Test Cannibalization			02/13/2006	1	FEATURE	$5,000	N/A	$5.89	$5.09
	Summary									
Current Year	Fall back pricing	10/10/2005	10/10/2005	10/10/2005	1	F. SHOPPER	$1,250	N/A	$5.89	$5.29
	Hot sales days	08/08/2005	08/08/2005	08/08/2005	1	FEATURE	$2,500	N/A	$5.89	$4.99
	Summary									
Summary										

PTP provides many kinds of series:

- Some series describe properties of item-location combinations; for example, Sales Quota. Others describe properties of promotions; for example, Veh Type.

- Most series have numeric values, but some have string or date values. For some series (like Cons Promo and Veh Type), you choose a value from a dropdown list.

- Some series are editable, some are editable only for specific dates, and some are not editable at all.

- Some are based on imported data.

- Some series are shown in different colors, depending on the data values or on other local conditions. For example, Incr Mfg Prft is shown in red if profit is negative.

PTP Data Hierarchy

PTP uses specific levels, organized into a flexible set of hierarchies. Some of these levels are not used in PTP worksheets, but are available if needed for reporting. Products are organized into several hierarchies, and locations are organized into another set of hierarchies. This section provides an overview.

Product Hierarchies

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

The Manufacturer Hierarchy

In the manufacturer hierarchy, items belong to brands. Brands, in turn, belong to manufacturers.

The Category Hierarchy

In the category hierarchy, items belong to brands, which belong to segments. Segments belong to categories.

Highest item level, which aggregates data across all items

Categories

Segments

Brands
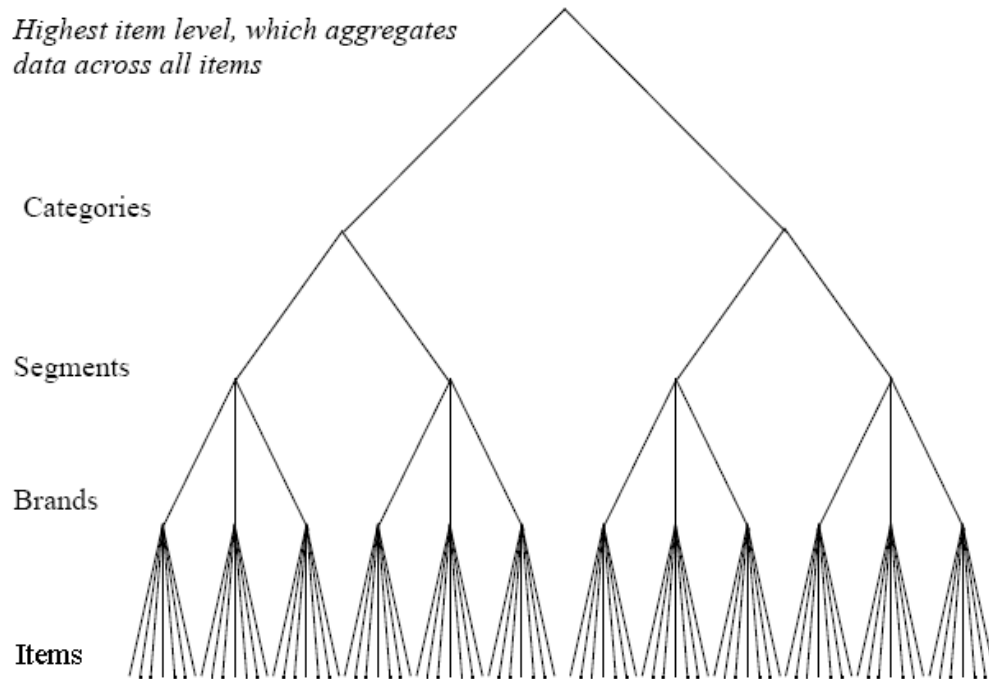
Items

The Promotion Group Hierarchy

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

The Product Line Hierarchy

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

Location Hierarchies

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

Ship To Hierarchies

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

Highest location level, which aggregates data across all ship-to locations

Bill To

Site
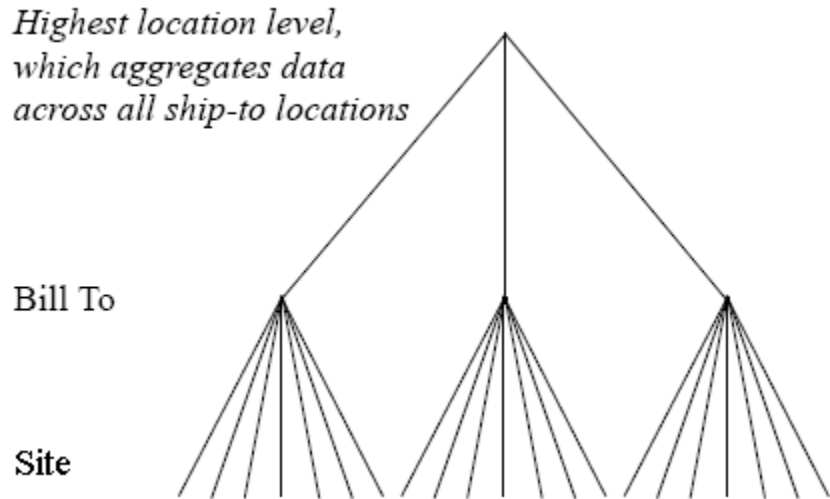
Ship To locations are also organized by retailer.

Highest location level, which aggregates data across all ship-to locations

Retailer

Site
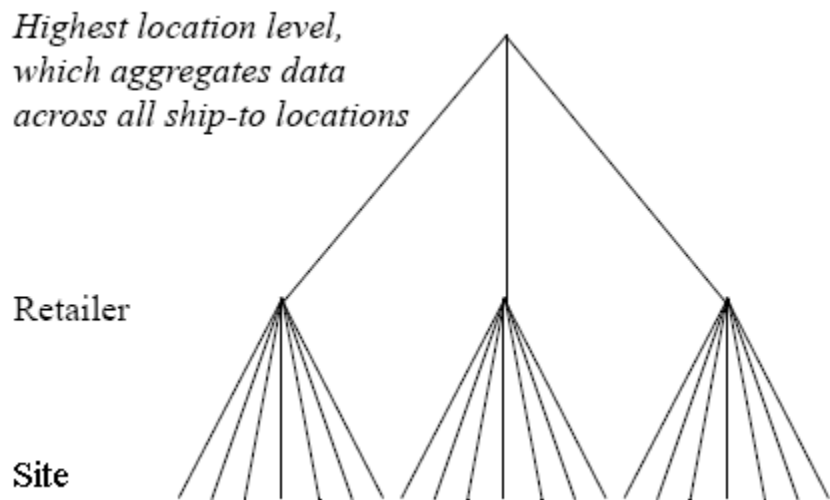
Territory Hierarchy

The Territory locations are organized in a single, fairly deep hierarchy. Territories are grouped into districts, which are grouped into regions. Regions, in turn, are grouped into sales areas, which are grouped into divisions, which are grouped into companies. The following figure sketches these relationships without indicating the members of each level:

Highest location level, which
aggregates data across all territories

Company

Division

Sales Area

Region

District
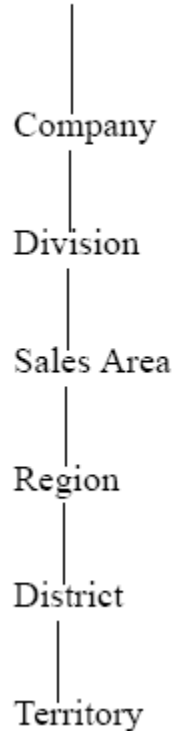
Territory

The Territory-Retailer Level

PTP also uses another level, the combined territory-retailer level, for analytic purposes. This level is meant for use only by the Analytical Engine.

Promotions

A promotion is an occurrence that starts at a specific date, has a certain duration, and has a certain time-varying effect on sales. PTP models promotions as another kind of level, as mentioned earlier, so that they can be used in worksheets in all the same ways as item and location levels.

In PTP, you usually create promotions at the retailer-promotion group level. Multiple promotions can be associated with a retailer and promotion group during the same time bucket.

How PTP Uses Promotion Properties

PTP models a common set of promotion properties that are known to affect the impact of promotions. These properties include the following:

- Vehicle type

- Sale price

- Promotion timing and duration

Each of these properties can have a different effect on the forecast or simulations. When the Analytical Engine runs (either in batch mode or simulation mode), it uses mathematical models to determine what effect each property had in the past. It uses this information to predict how each future promotion will behave.

These properties also affect how the Promotion Optimization behaves. See Optimizing a Promotion, page 9-4.

Promotions and Scenarios

Because it is useful to separate tentative promotions from real ones, most PTP worksheets organize promotions into two scenarios: Current Year and the Sandbox. When you create a new promotion, you place it in the Sandbox as long as it is tentative. When the promotion is definite (when mark its status as Planned), then you should move the promotion to the Current Year scenario.

A third scenario, actuals, contains promotions from previous years. These promotions are excluded from most PTP worksheets because they fall outside the span of time used in these worksheets.

Promotion Life Cycle and Status

PTP models a distinct life cycle for every promotion. The Event Status series shows the stage in which a given promotion resides; you can see this series in the Planning Environment and other worksheets. Typically a qualified user changes the status when appropriate.

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

2. Typically you run a simulation to see the baseline and incremental volume for the proposed promotion. In addition, the system will calculate measures to be used for the cost benefit review. These include profit for the manufacturer and retailer, available fund balances as well as the proposed cost for the promotion.

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

   - The cost of the promotion is deducted from the available balance of funds.

   - The forecast is updated.

4. The next stage is approved.

5. When you have a firm commitment from the retailer, you move the promotion to the committed stage. When a promotion is marked as committed, PTP takes a snapshot of details of the promotion, for use in later analysis. With this information, it will be possible to compare the total projected sales with the total actual sales, for example.

   Once a promotion has been committed, it is no longer editable.

6. After the promotion runs, the retailer may require payment for the promotion. You can advance the status to Partial Paid or to Paid to record the payment status.

7. Finally, the last stage is closed.

Retailer Profiles

Given that different retailers run different types of events differently, PTP stores retailer profiles that include details such as the following:

- Average everyday selling margin

- Minimum required event margin

- Default vehicle costs for each type of event

When you create a promotion of a given type for a retailer, PTP automatically initializes the vehicle cost as appropriate for that retailer, saving you the work of making a manual adjustment each time. You can override this vehicle cost if necessary.

The other retailer details affect the optimization process, which finds the best possible promotion for a given goal, considering the retailer-specific constraints.

PTP provides default settings that you can use for any retailer, so that you can start by providing details for just a few key retailers, without needing to enter all of them. You can modify these default settings as needed.

Funding

PTP provides the following standard set of promotion funds:

- Brand Development Funds (BDF)

- Market Development Funds (MDF)

- Slotting funds

In turn, both BDF and MDF include a portion for fixed funds and a volume-dependent portion, per common practice. For example, the total authorized BDF fund is computed

as follows:

rate * volume + fixed funds

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

In the Planning Environment, the Fund Balances window displays a summary of the funds and their balances. To set fund amounts, see PTP: Managing and Viewing Quotas and Funds - Overview, page 5-1.

Promotion Costs and Spending

Following standard practice, PTP models the promotional spend as a combination of fixed spending and per-unit spending. Specifically, apart from slotting costs, the spend for a given promotion is computed as follows:

vehicle costs + volume * buydown

For a given retailer, each vehicle type is assumed to have its own default cost. When you specify the vehicle type for a promotion for a retailer, PTP looks up and displays that cost. You can override this cost if necessary. As part of specifying the promotion details, you also specify the buydown, or discount per promoted unit that will be paid to the retailer (either as billback from the retailer or as an off-invoice settlement with the retailer).

In addition to specifying the promotion cost as described here, you also control how that promotion is to be funded. Specifically, when you mark a promotion as planned, you indicate how to split the cost between MDF and BDF; see Marking a Promotion as Planned, page 7-8.

Volume and Volume Breakdown

In general, PTP volume calculations use actuals for the past and forecasted volume for the future. So to compute volume as needed for total MDF or BDF funds for the year, PTP combines the actuals to date and the forecast.

In addition to providing the overall volume, PTP shows a breakdown of that volume into the following categories:

- Base volume.

- Incremental volume due to a promotion. Part of this incremental volume is due to cannibalization effects. The manufacturer and the retailers have different points of view about cannibalization, as noted below.

- Pre and post-promotional effects. Sales are usually lower just before and after a promotion, as consumers take advantage of the better price during the promotion itself. The Analytical Engine computes the total volume before and after the

promotion, as a result of the promotion, so that you can include this in your overall analysis.

Cannibalization

In addition to computing the incremental volume due to a promotion, the Analytical Engine computes specific cannibalization effects. Cannibalization includes multiple components, and the manufacturer and the retailer have different points of view.

- Product switching, as described in Cannibalization Seen by the Manufacturer, decreased sales due to sales at another retailer.

- Decreased sales of other products of the same brand at the same retailer. For example, sales of Exedra 24 were depressed by the promotion on Exedra 100, at the same retailer.

- Decreased sales of other brands (of the same manufacturer), regardless of retailer. For example, sales of Advo 50 were depressed by the promotion on Exedra 100, which is made by the same manufacturer.

Cannibalization Seen by the Manufacturer

PTP computes cannibalization that is undesirable to the manufacturer.

This worksheet table shows a promotion group where a promotion was run and all promotion groups that were adversely affected, according to the manufacturer.

The row in blue indicates the promotion group (Exedra 100) on which you ran a promotion. In this row, you can see the total event dollars, incremental event dollars, net incremental event dollars and so on, for the promotion. Note that for Exedra 100, there was zero dollars of cannibalization and $2324 of pre- and post-promotional effect.

On the other hand, examine the other promotion groups here and notice that they were all cannibalized. Of course, for these promotion groups, there was zero direct lift, by definition, as the promotion did not run on them.

Cannibalization Seen by the Retailer

PTP also computes cannibalization that is undesirable to the retailer.

This worksheet table shows a promotion group where a promotion was run and all promotion groups that were adversely affected, according to the retailer. As before, the row in blue indicates the promotion group (Exedra 100) on which you ran a promotion.

Notice two promotion groups are listed here that were not seen in the manufacturer version: Notrim 24 and Tyitol 50. These promotion groups represent products that this retailer sells, but that are made by a different manufacturer. To the retailer, it is undesirable to cannibalize these promotion groups.

Data Access

Once customer data is loaded, an administrator can configure a security access level for each user.

The Paste method is enabled for any level that has Write or Full Control permission in the component.

• If you do not have access to the target population, the Paste method is not visible

• If you have partial access to the target population the method Paste is visible but when the method is executed, read-only members are removed from the population.

For levels with a population attribute:

• When creating a new promotion, the default population is a merge of the worksheet levels and the population of the level member from where the method was invoked.

• Members of the population with Read-Only or No Access are excluded.

See Also:

"Security" in the *Oracle Demantra Implementation Guide Supplement*

3

Logging On and Getting Started

This chapter covers the following topics:

- Initial Logon and Download
- Logging Onto PTP
- Tutorial: Getting Acquainted with Worksheets
- Controlling Synchronization of Embedded Worksheets

Initial Logon and Download

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

1. Open Microsoft Internet Explorer.

2. Enter the web address supplied by your system administrator. This URL probably has the following format:

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

   For example:

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

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

3. Type your name and password and click Login.

   Oracle Demantra prompts you to install JRE.

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

> **Note:** Oracle Demantra uses Sun JRE 1.4.2_10. If you are prompted to install a later version of JRE, do not do so.
>
> To prevent Java from searching for updates, open the Java control panel. On the Update tab, make sure to deselect the check box Check for Updates Automatically.

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

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

After the initial configuration is completed, Oracle Demantra displays a new browser window. The page contains a menu bar, a tool bar, and a work space that is initially empty.

6. Click File > Open.

7. Click a worksheet in the list and then click Open.

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

See also

Creating or Editing a Worksheet or Content Pane, page 12-3.

Logging Onto PTP

If you have already performed the initial setup (see Initial Logon and Download, page 3-1), then log on as follows.

To log onto PTP:

1. Open Microsoft Internet Explorer.

2. Enter the web address supplied by your system administrator. This URL probably has the following format:

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

    For example:

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

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

3. Type your name and password, and then click Login.

    You can access Oracle Demantra Predictive Trade Planning worksheets using:

    *   Collaborator Workbench

    See also *Oracle Demantra Users Guide*.

Tutorial: Getting Acquainted with Worksheets

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

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

2. If the worksheet does not show data, click Data > Rerun. Or click the Run button.
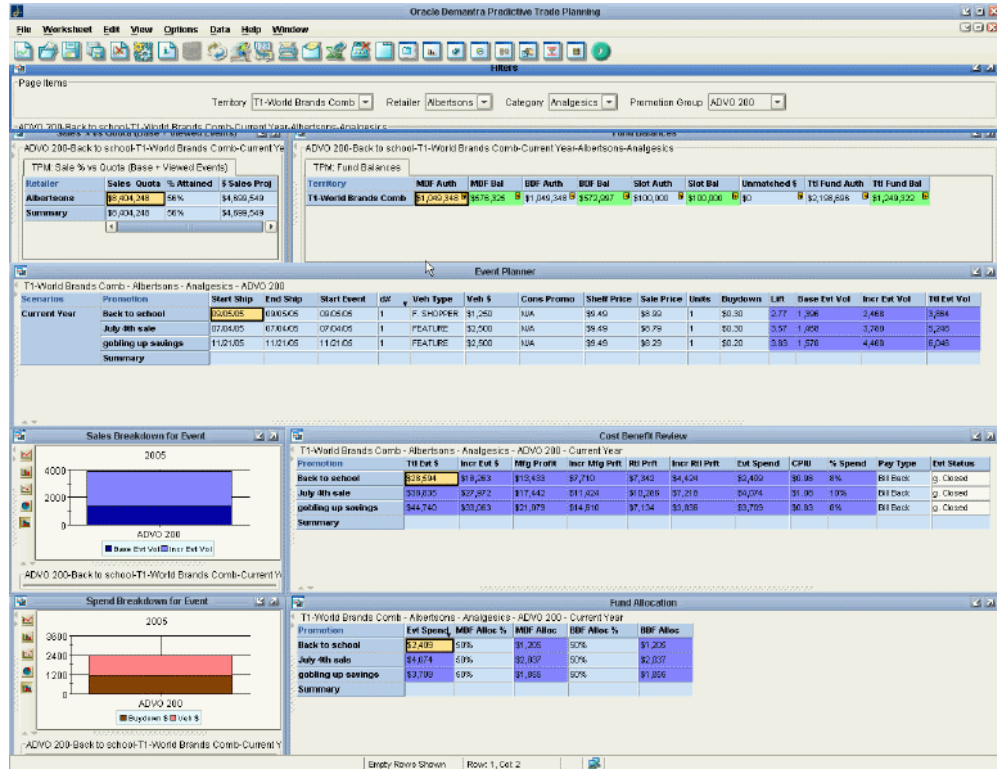
3. Scan the windows within the worksheet.

First, most worksheets contain an area that you use to select the data to display. This area is sometimes displayed as a treelike hierarchy).
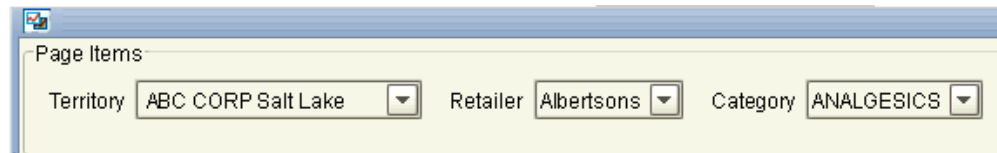
When you make a selection here, that changes anything of a lower level that is displayed elsewhere in the worksheet. For example, if you change the selection, you would see different promotions.

Second, worksheets contain two different kinds of tables, and it is important to know the difference between them. The first kind of table is a normal table.

T1-World Brands Comb - Albertsons - ANALGESICS - EXEDRA 100 - Sandbox						
Promotion	**Ttl Evt $**	**Incr Evt $**	**Mfg Profit**	**Incr Mfg Prft**	**Rtl Prft**	**Incr Rtl Prft**
Test Opti Scen	$527,686	$462,021	$92,503	$59,060	$63,241	$38,960
Test Proj	$232,973	$206,148	$108,654	$94,992	-$232,973	-$242,892
Summary						

The other kind of table is an *embedded worksheet* and appears as a tab within a tile. PTP uses embedded worksheets where they are needed for technical reasons.

Presidents sale - ABC CORP Salt Lake - Current Year - Albertsons - AN				
Fund Balances				
All				
Territory	**MDF Auth**	**MDF Bal**	**BDF Auth**	**BDF Bal**
ABC CORP Salt Lake	$353,841	$257,572	$650,000	
Summary	$353,841	$257,572	$650,000	

Both kinds of tables are labeled to indicate what they contain.

For PTP, there is one behavioral difference between these kinds of tables:

- When you select a row in a normal table, that may affect selections elsewhere in the worksheet. For example, if you click in a promotion row, the worksheet focus moves to that same promotion throughout the worksheet, including the embedded worksheets.

    Note: If you use the keyboard to move within a table, notice that the embedded worksheets are not automatically refreshed, for performance reasons.

- In contrast, when you select a row in an embedded worksheet, that has no effect on the focus in the rest of the worksheet.

A worksheet may also include graphs. Note that even if you click the graphs, it would have no effect on them. Note that you can change the graph style; see Changing the Graph Style

4. Right-click a data cell in one of the tables. Notice that you have options to copy and paste data, to edit multiple cells, and to display associated notes.

5. Right-click a promotion in the non-scrolling part of a worksheet table.

Notice that the right-click menu here provides options for working with promotions. Depending on your permissions, you may be able to do any of the following:

- View promotion attributes in a pop-up dialog box.

- Edit those attributes.

- Create new promotions.

- Copy, paste, or delete promotions.

- Open a promotion in a different worksheet (via the Open or Open With options).

> **Note:** When you open a worksheet this way, it is filtered to show just the promotion from which you launched it. Notice that the name of the promotion is added to the beginning of the worksheet title.

The right-click menu is also available for scenarios, in worksheets that display scenarios.

Controlling Synchronization of Embedded Worksheets

The embedded worksheets worksheet may or may not be synchronized with the rest of the worksheet. A worksheet runs faster if synchronization is off. On the other hand, you might find it less confusing to keep synchronization switched on. Also note that only promotion status changes have any effect on the data in embedded worksheets.

To control the synchronization:

Do one of the following:

1. Click one of the following toggle buttons in the tool bar.

- Automatically synchronize the embedded worksheets with the rest of

worksheet

- Synchronize on demand

2. Select Options > Synchronize On Demand or Synchronize Automatically.

Part 2

PTP and PMO Business Processes

4

Oracle Demantra Dashboard

This chapter covers the following topics:

- Introduction to the Dashboard
- Reviewing Metrics
- Reviewing the Planning Hierarchy
- Editing Retailer Information
- Opening Worksheets
- Managing Tasks
- Creating and Sending a Task
- Personalizing the Dashboard
- Configuring Your Default Layout
- Configuring My Tasks
- Configuring My Worksheets

Introduction to the Dashboard

This chapter introduces the Oracle dashboard: Collaborator Workbench.

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

To log into the dashboard

1. In Windows, click Start and click Programs.

2. Click Demantra > Demantra Spectrum release > Collaborator Workbench.

3. In the Log On dialog box, enter your user name and password.

4. Click Login.

5. If the toolbar includes a link labeled Click here to install Java Web Start, click that link.

   Next Oracle Demantra prompts you to install JRE.

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

   After you install this software, Collaborator Workbench comes up, displaying your personal page.
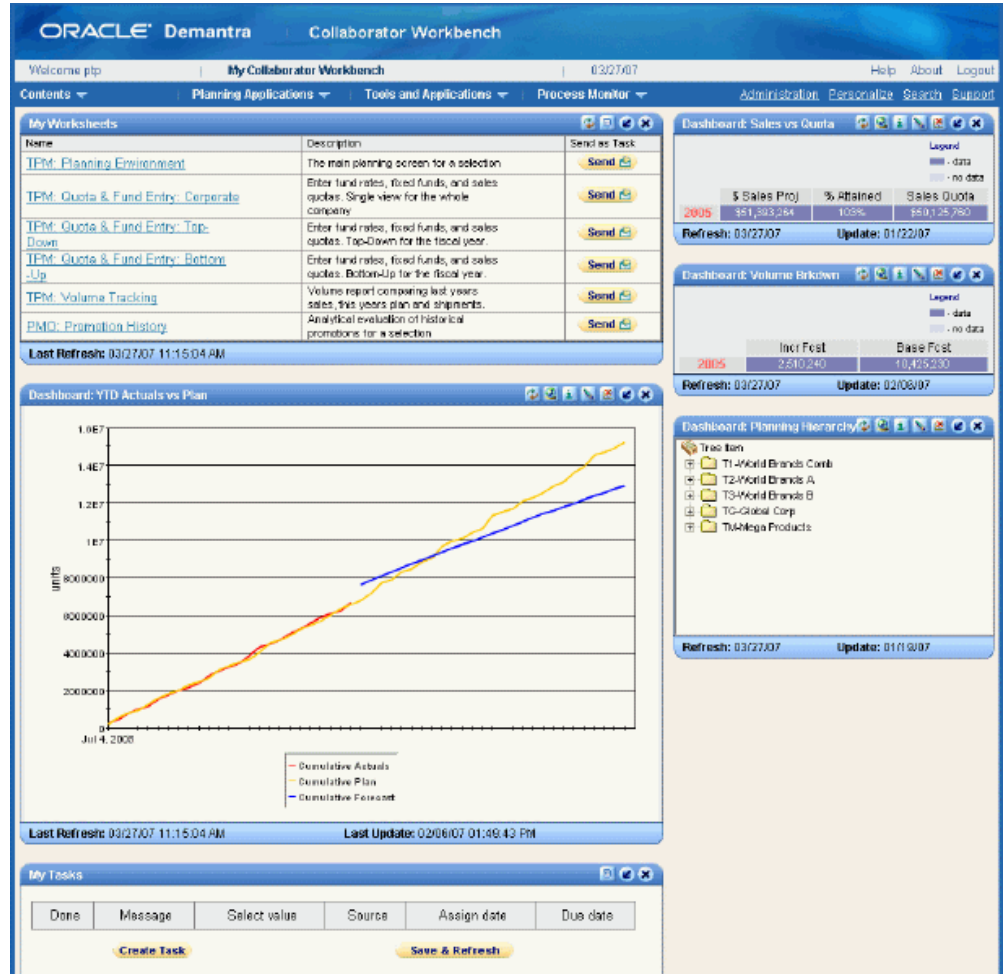
At this point, Oracle Demantra might display a dialog box that asks if you want to trust the signed application distributed by Oracle.

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

7. Click Yes (or Always) or Start.

Reviewing Metrics

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

Actuals versus Plan

This summary pane is a graph that shows cumulative actual volume and planned volume.
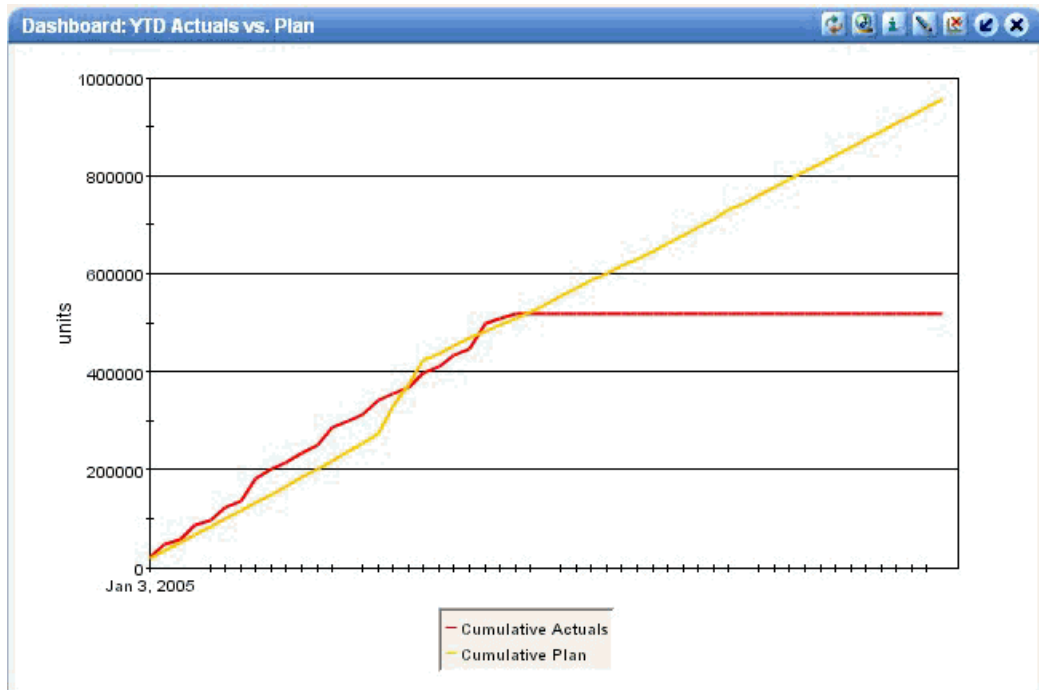
Sales versus Quota

This summary pane shows current sales compared to the sales quota.

Volume Breakdown

This summary pane displays a table that shows the breakdown of volume into base volume and incremental volume.

Reviewing the Planning Hierarchy

The Planning Hierarchy is an expandable, treelike view that you can use to navigate the planning hierarchy.
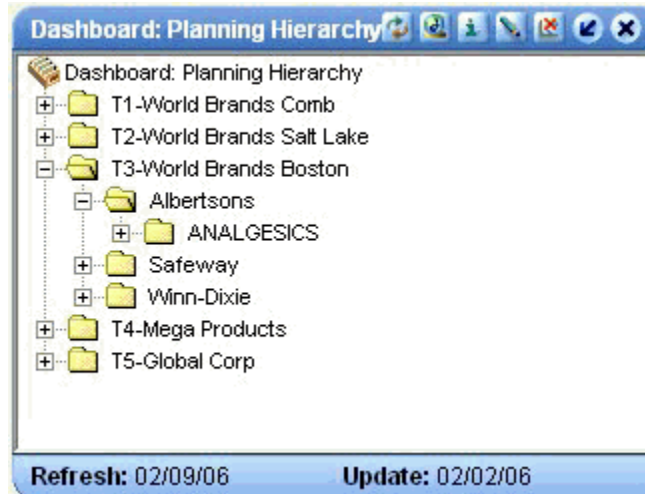
Expand the hierarchy as needed.

You can right-click for more options.
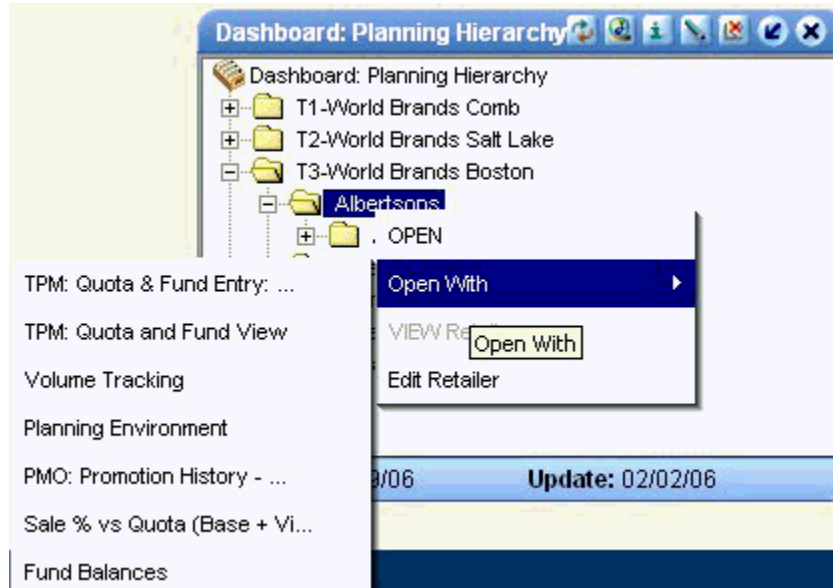
In particular, you can open worksheets that are filtered to the selected retailer (for example). In the case of retailers, you can also view or edit properties of the retailer such as minimum event margin.

Editing Retailer Information

PTP stores basic retailer details so that when you create a promotion, it is automatically specified appropriately for that particular retailer. PTP provides default settings that you can use for any retailer.

Setting a Retailer Profile to the Default

To set a retailer profile to the default settings

1. In the Planning Hierarchy, expand the tree display to the retailer level.

2. Right-click the retailer and click Edit Retailer.

   PTP displays the Edit Retailer screen.

3. Change Use Default Profile to Yes.

> **Caution:** Do this only if you are certain that you want to change all settings for this retailer.

4. Click OK.

5. Log into the Workflow Manager and run the CopyRetailerDefaults workflow; see Administration - Running Required Workflows, page 14-2.

This workflow checks for any retailers that have been set to use the default profile, and it copies the default details to those retailers.

Editing a Retailer Profile

To edit a retailer profile

1. In the Planning Hierarchy, expand the tree display to the retailer level.

2. Right-click the retailer and click Edit Retailer.

   PTP displays the Edit Retailer screen, as shown in the previous procedure.

3. Set Use Default Profile to No.

   > **Caution:** If you do not set Use Default Profile to No, your changes
   > will be reset to the default.

4. Enter values for the other attributes as follows:

Name	Name of the retailer.
Class_of_Trade	Dropdown list with the following choices: • Food • Drug • Mass • C-Store • Military
Number of Active Stores	Number of active stores that this retailer operates.
Account Classification	Dropdown list with the following choices: • Growth • Holding • Declining
Avg Everyday Selling Margin	Average selling margin, disregarding promotions.
Min Rtl Event Margin	Minimum margin that this retailer must make on an event. Promotion Optimization considers only events that provide at least this much margin.
Veh Costs: Feature & Display	Default cost for an event of type F&D for this retailer.
Veh Costs: Feature Only	Default cost for an event of type Feature for this retailer.

Veh Costs: Display Only	Default cost for an event of type Display for this retailer.
Veh Costs: TPR Only	Default cost for an event of type TPR for this retailer.
Veh Costs: F Shopper	Default cost for an event of type F. Shopper for this retailer.
Key Competitors	A text field where you can list the key competitors of this retailer.

5. Click OK.

Opening Worksheets

Each worksheet is a working environment designed for specific PTP and TPO business processes.

To open worksheets using Collaborator Workbench, click My Worksheets, or right-click Planning Hierarchy, or right click an open worksheet.

See also *Oracle Demantra Users Guide*.

To open a worksheet

- To open an unfiltered worksheet, click a worksheet listed in My Worksheets.

- To open a worksheet that is filtered to a specific context, right-click a promotion, scenario, retailer, or territory, click Open With, and then click the worksheet name. You can do this within the Planning Hierarchy or within an open worksheet.

  When you open a worksheet this way, it is filtered to show just the object from which you launched it. Notice that the name of the object is added to the beginning of the worksheet title.

  > **Note:** When you first open a worksheet, Oracle Demantra might display a dialog box that asks if you want to trust the signed application distributed by Oracle.
  >
  > Click Yes (or Always) or Start.

See

- Configuring My Worksheets, page 4-15

- Creating and Sending a Task, page 4-10

Managing Tasks

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

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

To view all assigned tasks

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

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

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

To mark a task as done

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

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

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

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

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

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

Creating and Sending a Task

To create and send a task

1. Start by doing one of the following:

- Within My Worksheets, click Send on the worksheet that you want to send.

- Within My Tasks, click Create Task.

  The Send Task to User dialog box appears.

2. Click To..... and select the users or groups to receive the task.

3. In the Message field, type a short text message.

   This will be the task message that the recipient sees. The worksheet that you are sending will be added automatically as a link from the Message text.

4. In the Description field, type a short description.

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

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

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

6. To attach a file to the task, enter the path to the file in the File Attachment field or use the Browse button to find it.

7. To ensure that this task is completed by a specific time, click Escalate and then provide the following information:

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

8. To send an email notification to the recipient of the task, select the Send email list check box. (Depending on how your system has been configured, this option may not be available.)

9. Click Send Task.

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

Personalizing the Dashboard

You can personalize Collaborator Workbench in several different ways:

- Configuring Your Default Layout, page 4-12

- Configuring My Tasks, page 4-14

- Configuring My Worksheets, page 4-15

To add new summary panes, see Creating or Editing a Worksheet or Content Pane, page 12-3.

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.
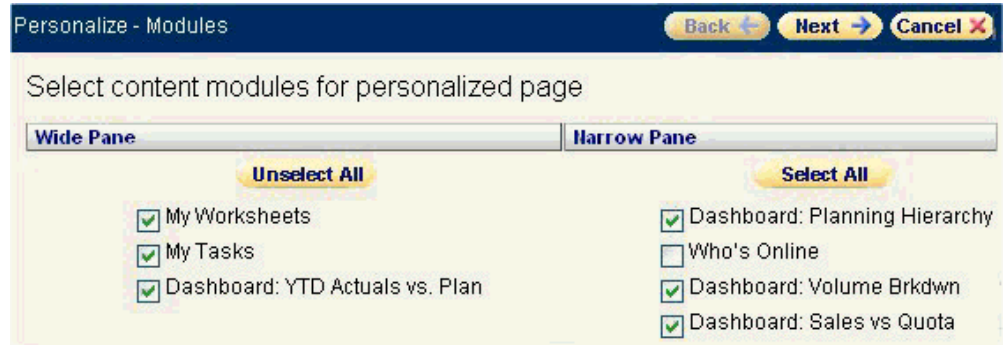
These lists include the following:

- 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 clear the modules that you want to see.

3. Click Next.

The Personalize - Order page appears. Like the previous page, this page has one list for the wide pane and one for the narrow pane.
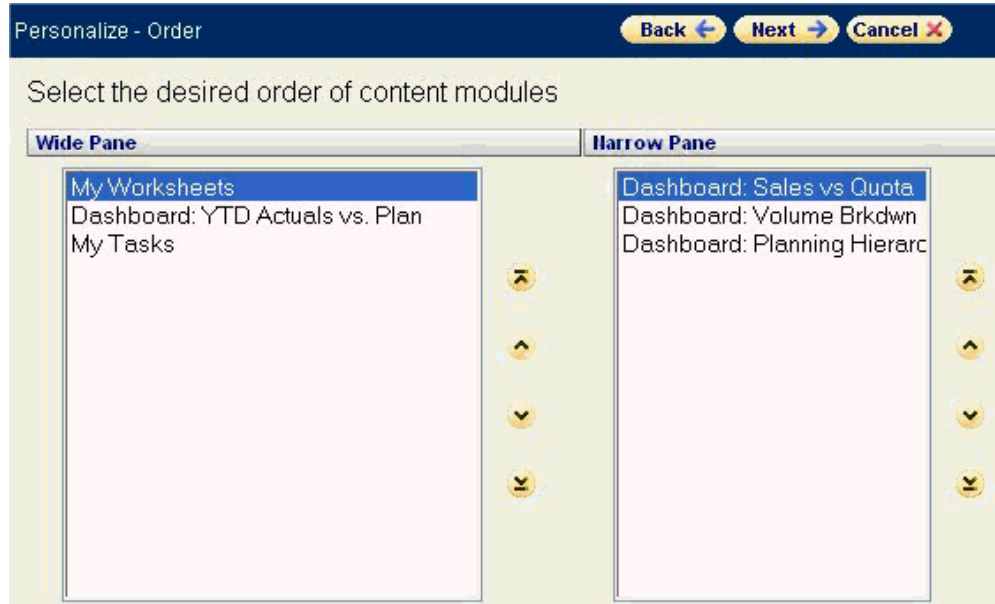
4. Select a module and then click the up or down buttons to change its position in the list.

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

5. Click Next.

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

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

Configuring My Tasks

To configure My Tasks

1. If Collaborator Workbench is not currently displaying My Tasks, then display it as described in "Configuring Your Default Layout".

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

    Collaborator Workbench displays a page like the following:

3. In the Number of Tasks to View field, type the maximum number of tasks that you want to see in My Tasks.

4. From the Order Tasks by list, select the field that you want to list the tasks by.

5. From the Sort dropdown menu, select the sorting order that you want for the tasks. Task fields can be listed in either ascending or descending order.

6. Click Finish.

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

Configuring My Worksheets

To configure My Worksheets

1. If Collaborator Workbench is not currently displaying My Worksheets, then display it as described in "Configuring Your Default Layout".

2. In My Worksheets module, click the personalize button in the upper right corner.

   Collaborator Workbench displays a list of all available worksheets. This includes all worksheets you own and all public worksheets.
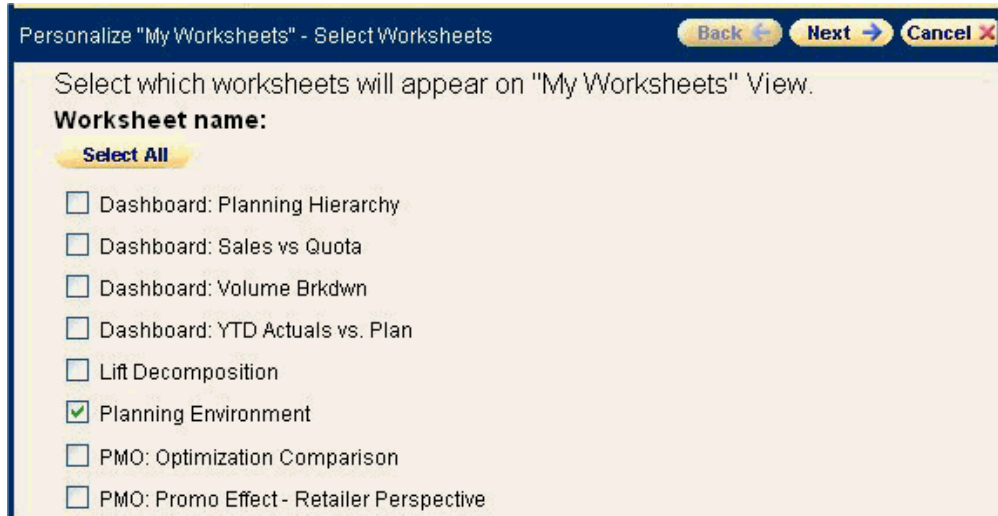
3. Select the check box next to worksheet that you want to display.

4. Click Next.

   Collaborator Workbench displays a new page where you specify how many worksheets to display and the display order for the worksheets you have selected.
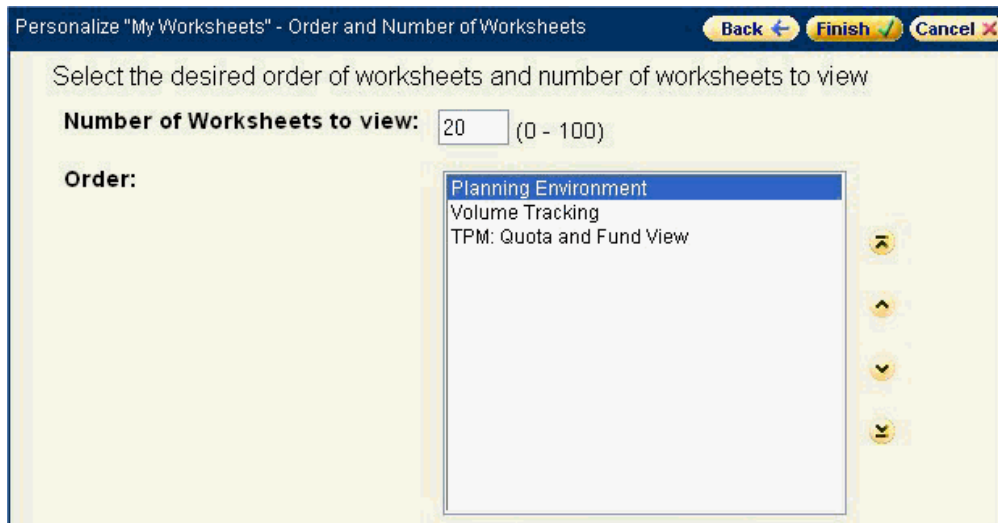
5. In the Number of Worksheets to View field, type the maximum number of worksheets that you want to see in My Worksheets.

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.

5

PTP: Managing and Viewing Quotas and Funds

This chapter covers the following topics:

- Overview
- Managing Quotas and Funds at the Retailer Level
- Managing Quotas and Funds at the Promotion Group Level
- Viewing Quotas and Funds
- Reference

Overview

This chapter describes how to manage or view quotas and funds in Oracle Demantra, as part of the PTP business process.

To manage or view quotas and funds, you start in the Collaborator Workbench and launch any of the relevant PTP worksheets.
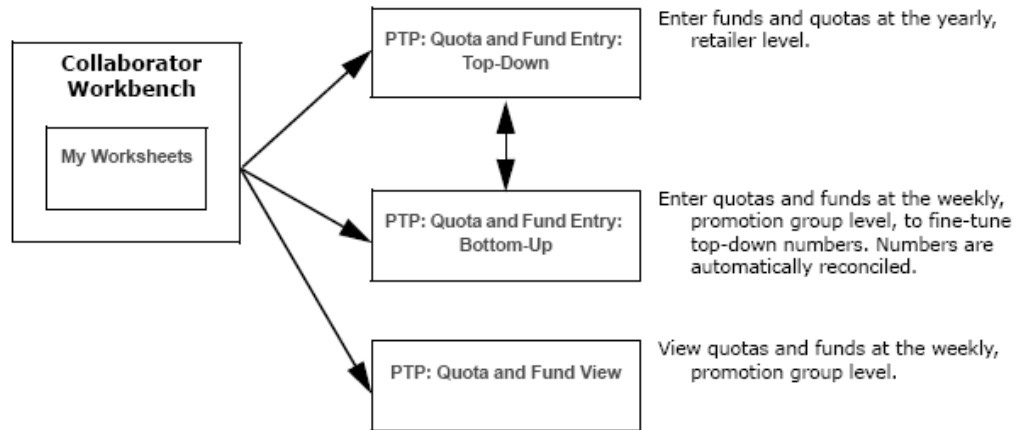
About Quotas and Funds

Oracle Demantra displays a standard set of promotion funds, which you can view or modify at several different levels, as appropriate, along with the quota (Sales Quota) that they are intended to support.

Available Funds

PTP provides the following standard set of promotion funds, broken out as follows:

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

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

- Slotting funds (Slot Auth)

- In summary, the total authorized funding (BDF, MDF, and slotting) is shown as Ttl Fund Auth.

As in standard usage, the rates are per unit so that the authorized funding is the volume multiplied by the rate. For example, BDF Auth is computed as follows:

(BDF Base Rate + BDF Dev Rate) * volume + BDF Fixed Funds

You can see or edit these funds on several worksheets. One example (PTP: Quota and Fund Entry: Top-Down) is shown below.
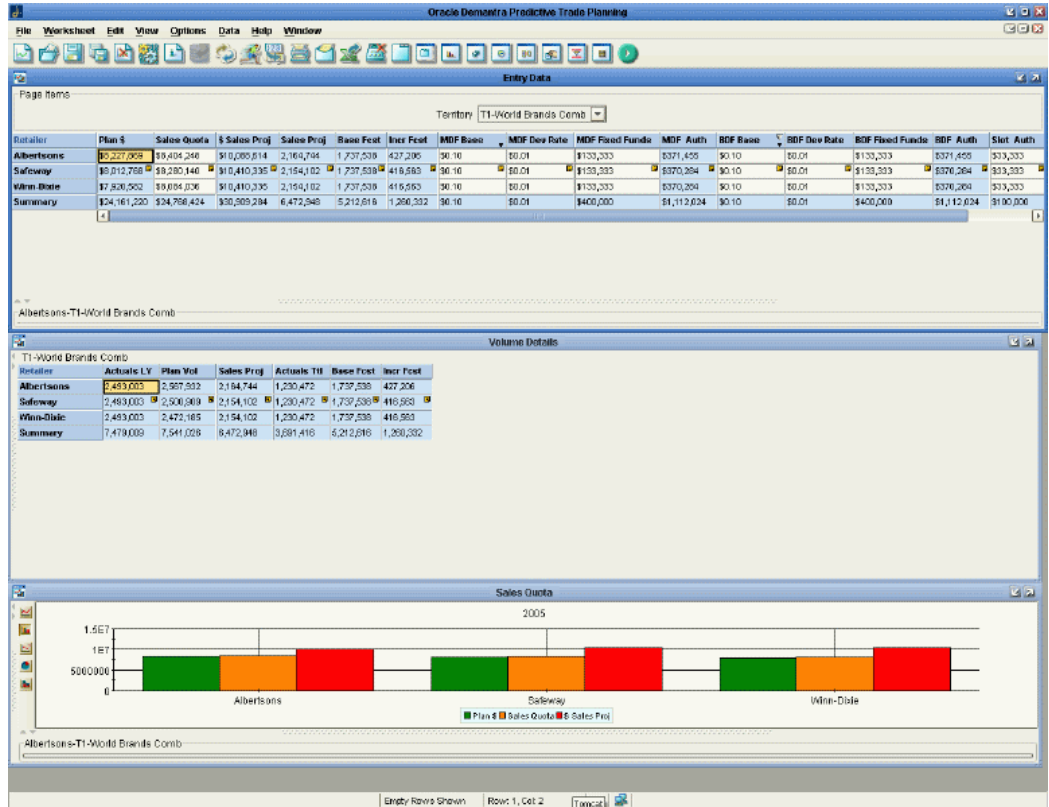
Volume

Because volume affects the use of the funds, PTP also displays the following volume information:

- Actuals Ttl (the past volume)

- Volume Base (the base volume, in the absence of any promotions)

- Uplift (additional volume due to planned promotions)

In general, PTP volume calculations use actuals for the past and forecasted volume for the future. This means that to compute volume as needed for total BDF funds for the year, for example, PTP combines the actuals and the forecast.

Unplanned promotions do not affect volume.

Managing Quotas and Funds at the Retailer Level

Typically, you would start by working top-down, setting quotas and funds at the retailer-territory level.

To manage quotas and funds at the retailer-territory level

1. Start in Collaborator Workbench.

2. In My Worksheets, click PTP: Quota and Fund Entry: Top-Down.

   Or if a worksheet is currently open, click File > Open. Click PTP: Quota and Fund Entry: Top-Down and then click Open.

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

4. At the top of the screen, select the territory to display.
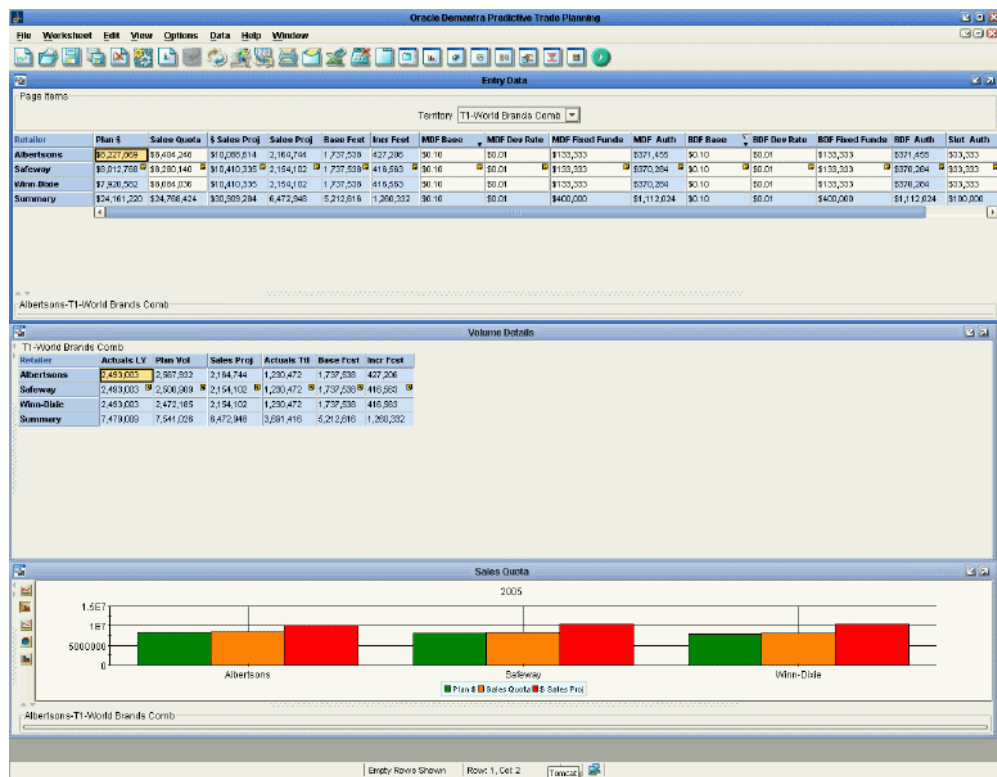
5. In the Entry Data table, edit the quota and fund values as needed. Here you are editing values for the entire year, for a given retailer.

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

Entry Data

Here you enter the funds and quotas. This table shows all the quotas and funds for each retailer, aggregated over the year.

Volume Details

This table summarizes the volume information.

T1-World Brands Comb

Retailer	Actuals LY	Plan Vol	Sales Proj	Actuals Ttl	Base Fcst	Incr Fcst
Albertsons	2,493,003	2,593,003	2,201,506	1,230,472	1,706,149	495,358
Safeway	2,493,003	2,523,003	2,108,485	1,230,472	1,706,149	402,336
Winn-Dixie	2,493,003	2,493,003	2,108,485	1,230,472	1,706,149	402,336
Summary	7,479,009	7,609,009	6,418,476	3,691,416	5,118,446	1,300,030

Sales Quota

This graph shows the plan, the sales quota, and the projection for each retailer.
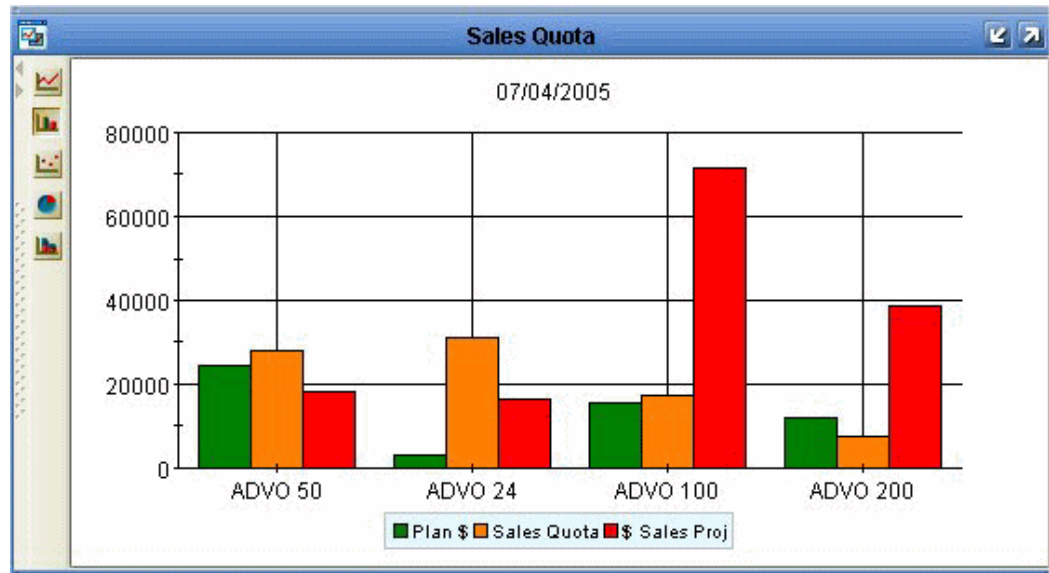
Possible Actions

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

- Edit fund rates, fixed funds, and quotas.

- Use File > Open to access other PTP worksheets. (It is not recommended to open the PMO worksheets this way, because they will not be filtered and will be slow.)

Managing Quotas and Funds at the Promotion Group Level

If you have already set quotas and funds at a high level, you might want to fine-tune

the amounts by adjusting values at the lower levels.

To manage quotas and funds at the promotion group level

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

Entry Data

This table shows all the quotas and funds for the selection, by week.

Sales Quota

This graph shows the plan, the sales quota, and the projection for each promotion group.
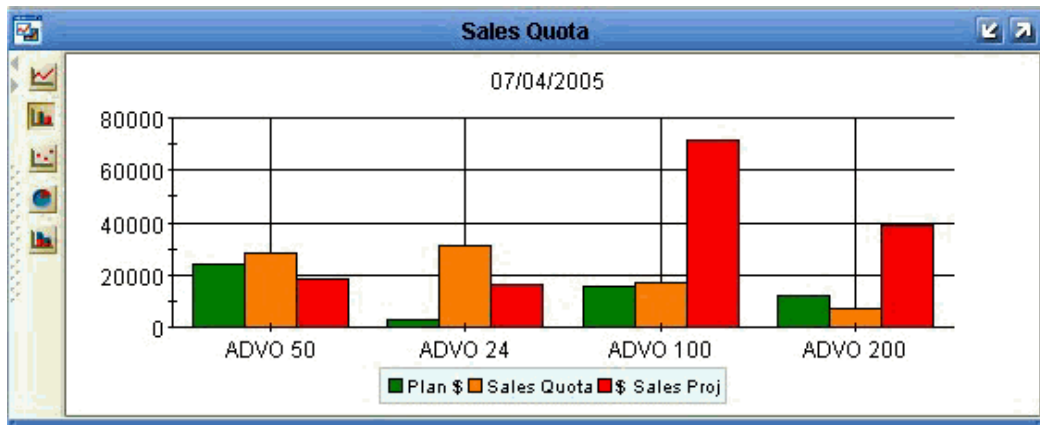
Possible Actions

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

- Edit funds and quotas.

- Use File > Open to access other PTP worksheets. (It is not recommended to open the PMO worksheets this way, because they will not be filtered and will be slow.)

Viewing Quotas and Funds

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

To view quotas and funds

1. In My Worksheets (in Collaborator Workbench), click PTP: Quota and Fund View.

Or if a worksheet is currently open, click File > Open. Click PTP: Quota and Fund View and then click Open.

2. If the worksheet does not show data immediately, click Data > Rerun.

3. At the top of the screen, select the territory, retailer, and brand to display.
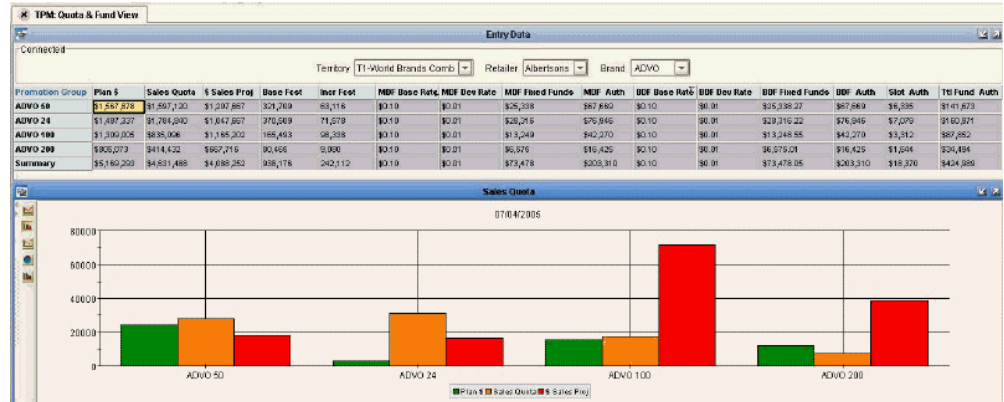
The table shows all the quotas and funds for each brand, broken down by promotion group. For each promotion group, the quotas and funds are displayed for the entire year.

The graph below that shows the quota for each promotion group.

Possible Actions

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

Use File > Open to access other PTP worksheets.

Reference

PTP: Quota and Fund Entry: Top-Down

This worksheet lets you set quotas and funds at the retailer level.

Basics

Accessing this worksheet	•	In My Worksheets (in Collaborator Workbench), click PTP: Quota and Fund Entry: Top-Down.
	•	If a worksheet is currently open, click File > Open. Click PTP: Quota and Fund Entry: Top-Down and then click Open.
Levels you can select	Territory	
Levels used in cross tabulation	Retailer	
Time aggregation	Yearly	

Business Data

View	Series	Description
Entry Data	Plan $	The manufacturer's planned revenue
	Sales Quota	Sales quota (revenue)
	$ Sales Proj	Planned sales dollars: actuals plus forecast
	Sales Proj	Planned sales volume: actuals plus forecast
	Base Fcst	Base volume: actuals plus forecast
	Incr Fcst	Incremental volume: actuals and forecast due only to planned promotions
	MDF Base Rate	Market development fund base rate
	MDF Dev Rate	Market development fund development rate
	MDF Fixed Funds	MDF fixed funds
	MDF Auth	Authorized market development funds, calculated as follows: (base rate + dev rate)*volume + fixed MDF funds

View	Series	Description
	BDF Base Rate	Brand development fund base rate
	BDF Dev Rate	Brand development fund development rate
	BDF Fixed Funds	BDF fixed funds
	BDF Auth	Authorized brand development funds, calculated as follows: (base rate + dev rate)*volume + fixed BDF funds
	Slot Auth	Authorized slotting funds
	Ttl Fund Auth	Total authorized spending, including MDF, BDF, and slotting
Volume Details	Actuals LY	Actual demand one year ago
	Plan Vol	The manufacturer's planned volume
	Sales Proj	Planned sales volume: actuals plus forecast
	Actuals Ttl	Total actual quantity (including both base and incremental volume)
	Base Fcst	Base volume: actuals plus forecast
	Incr Fcst	Incremental volume: actuals and forecast due only to planned promotions
Sales Quota	Plan $	The manufacturer's planned revenue
	Sales Quota	Sales quota (revenue)
	$ Sales Proj	Planned sales dollars: actuals plus forecast

PTP: Quota and Fund Entry: Bottom-Up

This worksheet lets you set quotas and funds at lower levels.

Basics

Accessing this worksheet	• In My Worksheets (in Collaborator Workbench), click PTP: Quota and Fund Entry: Bottom-Up.
	• If a worksheet is currently open, click File > Open. Click PTP: Quota and Fund Entry: Bottom-Up and then click Open.
Levels you can select	Territory, Retailer, Brand, Promotion Group
Levels used in cross tabulation	None
Time aggregation	Weekly

Business Data

Same as for PTP: Quota and Fund Entry: Top-Down, except that this worksheet does not include a Volume Details area.

PTP: Quota and Fund View

This read-only worksheet lets you view quotas and funds.

Basics

This read-only worksheet lets you view quotas and funds.

Accessing this worksheet	• In My Worksheets (in Collaborator Workbench), click PTP: Quota and Fund View.
	• If a worksheet is currently open, click File > Open. Click PTP: Quota and Fund View and then click Open.
Levels you can select	Territory, Retailer, Brand
Levels used in cross tabulation	Promotion Group
Time aggregation	Weekly

Business Data

Same as for PTP: Quota and Fund Entry: Top-Down, except that this worksheet does not include a Volume Details area.

6

PTP: Tracking Volume

This chapter covers the following topics:

- Overview
- Reference

Overview

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

To track volume, you start in the Collaborator Workbench and launch the Volume Tracking worksheet:
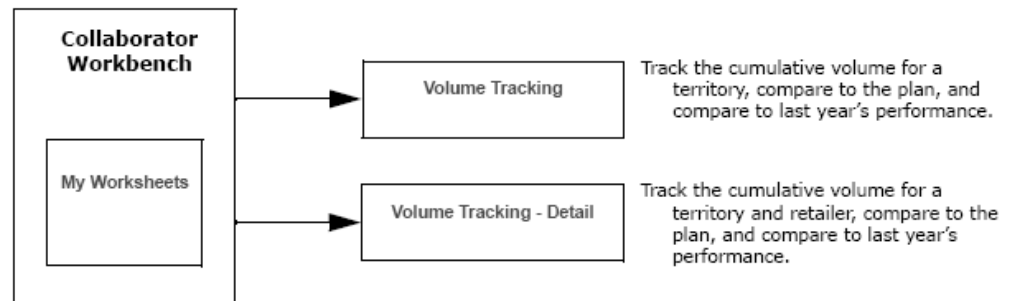
The Volume Tracking report is where product, territory, and account volumes are forecasted and monitored to ultimately feed volume requirements to operations. Fund planning already covered will be integrated with volume planning, because forecast volumes drive budgets in live accrual environments and drive spending for case rate allowances and other variable spending deals.

In the Volume Tracking - Detail report, you can drill down to the retailers of a territory and see the same data.

Tracking Volume for Territories

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

    Or if a worksheet is currently open, click File > Open. Click Volume Tracking and then click Open.

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

3. At the top of the screen, select the territory whose volume you want to see.
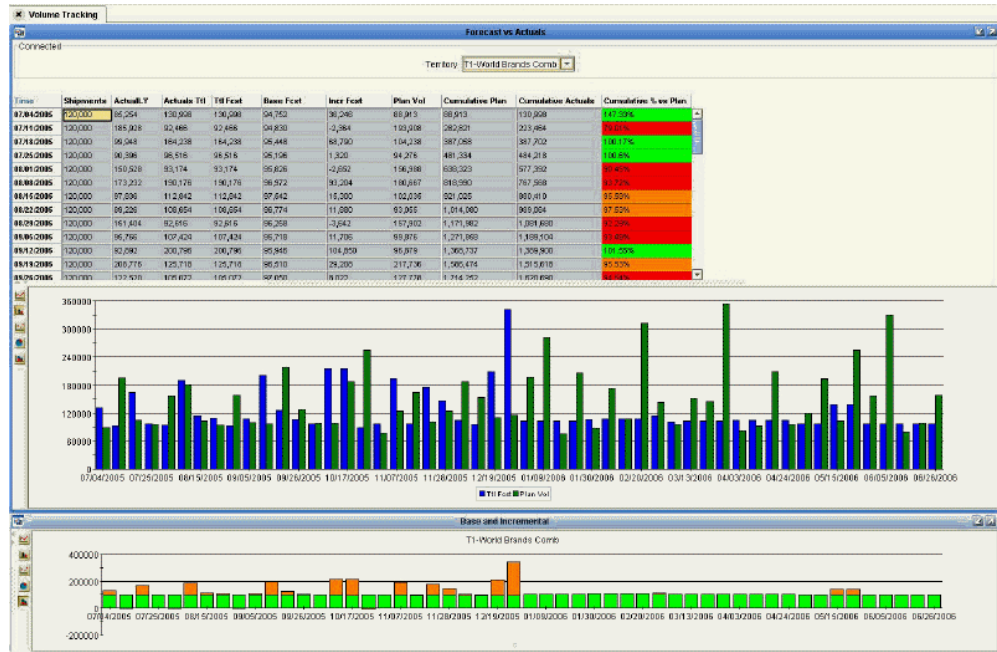
Volume Tracking Table

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

This table tracks the following on a weekly basis:

- Last year's shipments

- This year's shipments

- The current year's base volume projection

- The current year's incremental volume projection

- Cumulative % versus your plan

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

- Green is above plan

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

- Red is more than 5% below plan

Volume Tracking Graph

The Volume Tracking graph gives you a week-by-week look at the plan and the total forecast.
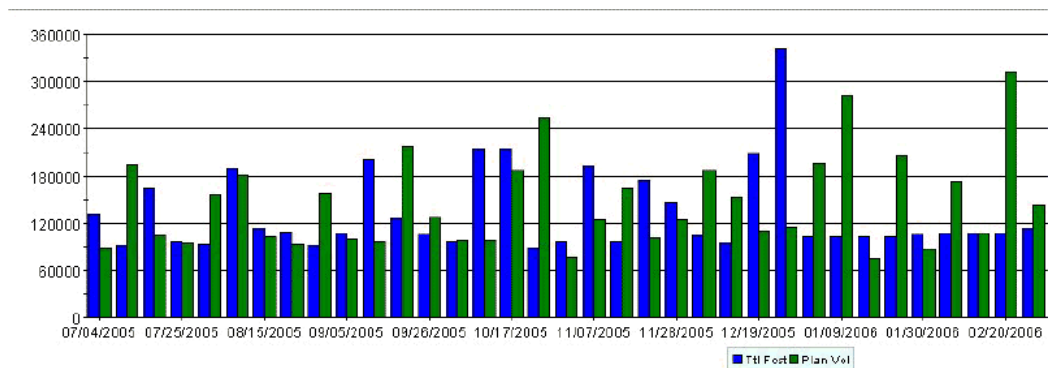
Base and Incremental Graph

The Base and Incremental graph displays the current year's base and incremental sales.
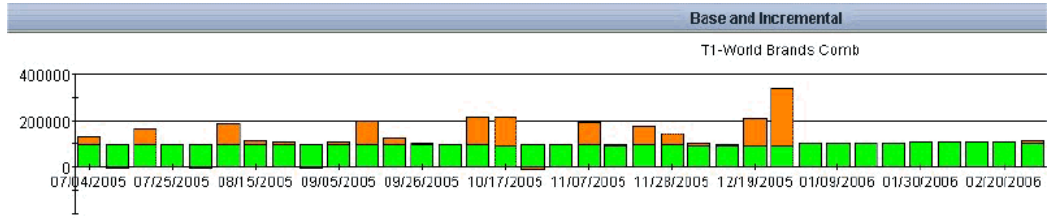
Possible Actions

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

Use File > Open to access other PTP worksheets.

Tracking Volume for Retailers

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

   Or if a worksheet is currently open, click File > Open. Click Volume Tracking - Detail and then click Open.

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

3. At the top of the screen, select the territory and then retailer whose volume you want to see.
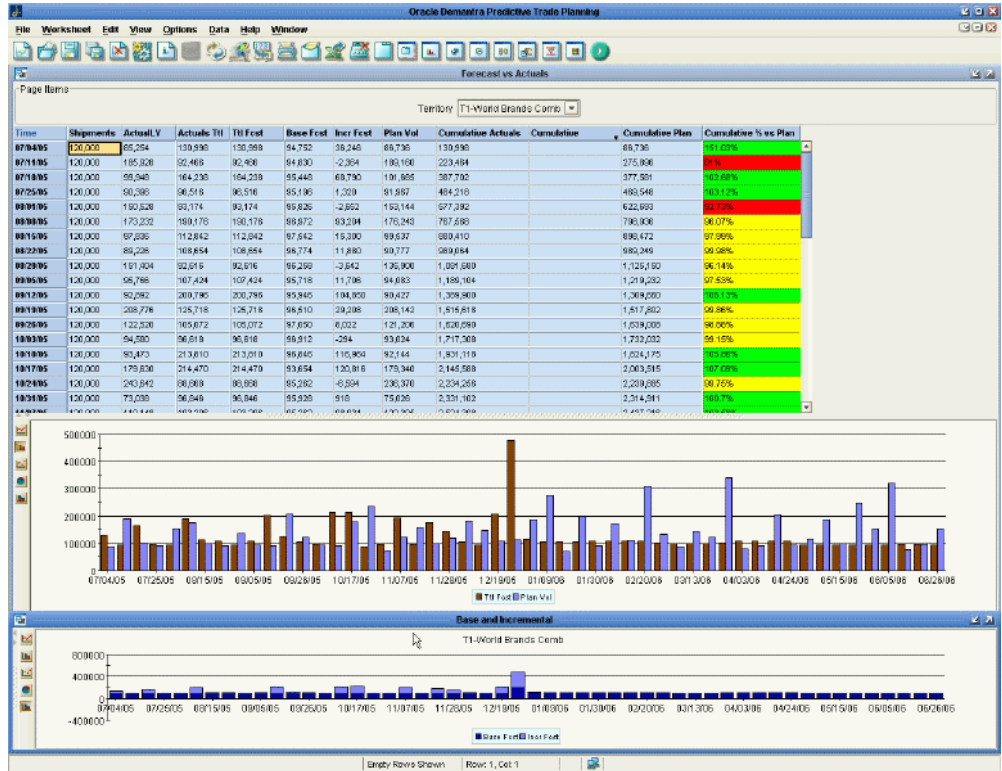
This worksheet shows the same data as the Volume Tracking worksheet; see Tracking Volume for Territories, page 6-2.

Reference

Volume Tracking

This worksheet compares last year's sales to this year's plan.

Basics

Accessing this worksheet	• In My Worksheets (in Collaborator Workbench), click Volume Tracking.
	• If a worksheet is currently open, click File > Open. Click Volume Tracking and then click Open.
Levels you can select	Territory

Levels used in cross tabulation	None
Time aggregation	Weekly

Business Data

View	Series	Description
Forecast vs Actuals	Shipments	Historical shipment volume from the manufacturer to the retailers' locations
	ActualLY	Actual demand one year ago
	Actuals Ttl	Total actual quantity (including both base and incremental volume)
	Ttl Fcst	Total volume: base forecast plus incremental forecast
	Base Fcst	Base volume: actuals plus forecast
	Incr Fcst	Incremental volume: actuals and forecast due only to planned promotions
	Plan Vol	The manufacturer's planned volume
	Cumulative Actuals	Total actuals (base plus incremental) cumulative to date
	Cumulative Plan	Cumulative frozen planned volume
	Cumulative % vs Plan	Total cumulative actuals, as a fraction of the plan
Base and Incremental	Base Fcst	Base volume: actuals plus forecast
	Incr Fcst	Incremental volume: actuals and forecast due only to planned promotions

Volume Tracking - Detail

This worksheet compares last year's sales to this year's plan, at a lower level.

Basics

Accessing this worksheet	• In My Worksheets (in Collaborator Workbench), click Volume Tracking - Detail. • If a worksheet is currently open, click File > Open. Click Volume Tracking - Detail and then click Open.
Levels you can select	Territory, Retailer
Levels used in cross tabulation	None
Time aggregation	Weekly

Business Data

Same as in the Volume Tracking worksheet.

7

PMO: Planning Promotions

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

This chapter covers the following topics:

- Introduction to the Planning Environment
- Creating a Promotion
- Marking a Promotion as Planned
- Approving a Promotion
- Committing a Promotion
- Marking a Promotion as Partially Paid or Paid
- Closing a Promotion
- Making Other Changes to a Promotion
- Duplicating a Promotion
- Copying and Pasting a Promotion
- Deleting a Promotion
- Reference

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 and navigate the Planning Environment

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

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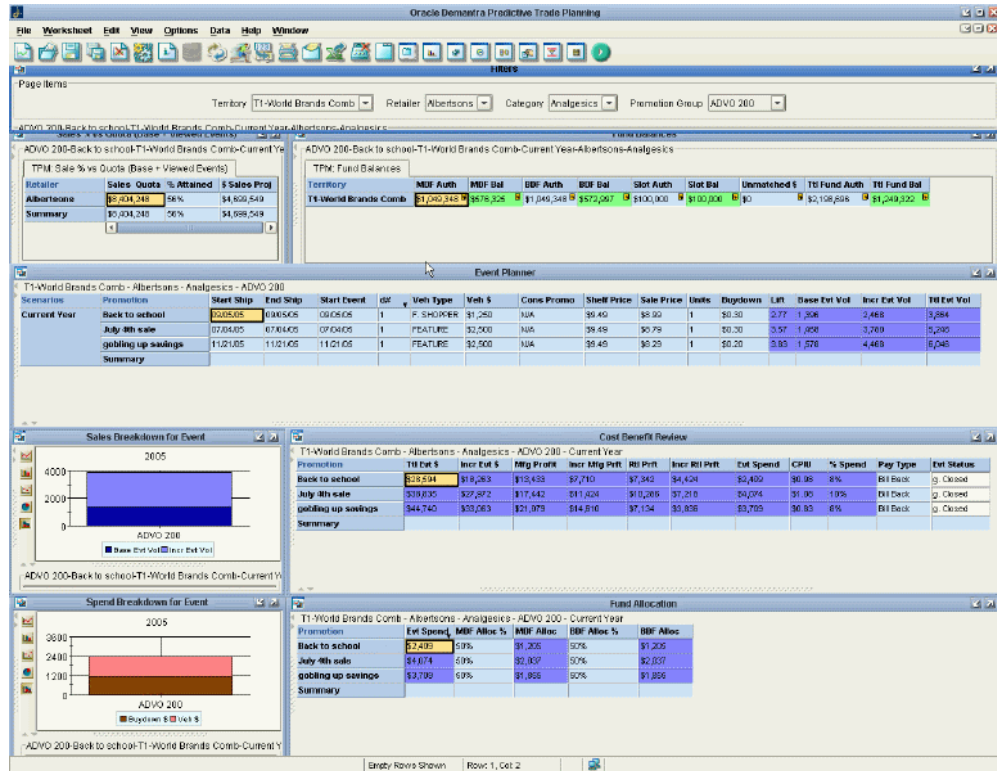
3. At the top of the screen, select the territory, retailer, category, and promotion group.

4. In the Event Planner window, click a row. Notice the following changes in the rest of the worksheet, depending on the scenario and promotion associated with that row:

   • The graphs below this display graphical information for the promotion.

   • The tables below this display side-by-side details for all promotions within the currently selected scenario.

5. Click a promotion in the Cost Benefit Review or Fund Allocation window. Notice that the same promotion is highlighted throughout the worksheet.

Color Conventions

The Planning Environment uses the following color conventions:
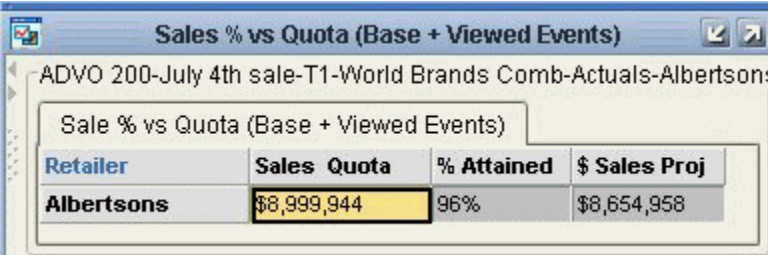
- White indicates editable fields.

- Gray indicates loaded data such as Start Ship and End Ship.

- Blue indicates data that is calculated by PTP, especially by the Analytical Engine.

- Red indicates negative profit numbers.

Also notice that in the Event Planner window, the Evt Status for a promotion may be displayed in different colors, to indicate whether that promotion has been optimized. Here:

- White means that the promotion has not been optimized.

- Yellow means that the promotion has been optimized.

- Green means that the promotion has been optimized and accepted, so that the promotion is using the optimization results.

Sales % vs. Quota

This window shows an analysis of planned sales to sales quota, for the given retailer. This is the total for the retailer. For convenience, the sales projection is also shown.

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

Sales % vs Quota (Base + Viewed Events)
ADVO 200-July 4th sale-T1-World Brands Comb-Actuals-Albertsons

Fund Balances

This window provides a detailed overview of authorized funds (MDF, BDF, slotting), spend and fund balances to date, for the given territory. This is the total for the territory.

Event Planner

This window shows event details such as the start and end ship dates, vehicle type, vehicle cost, buydown, base volume and incremental volume. Incremental volume is generated by Demantra's comprehensive analytical engine.

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

This window is the primary area in which you create or modify promotions.

Also notice that when you select a row in this window, the graphs and tables below are updated to show details depending on the scenario and promotion associated with that row.

Sales Breakdown for Event

This window graphically shows the sales breakdown for the selected event. The breakdown shows both base and incremental volume.
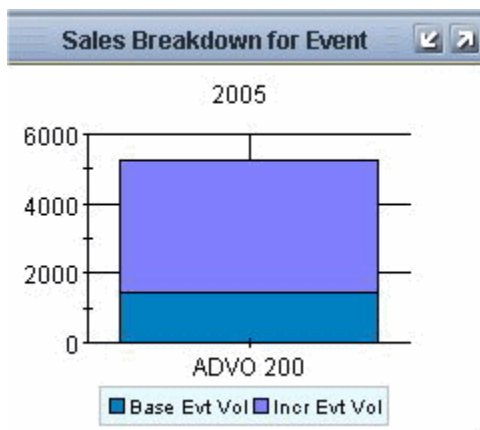
Spend Breakdown for Event

This window graphically shows the spending breakdown for the selected event. The breakdown shows both vehicle spending and buydown.
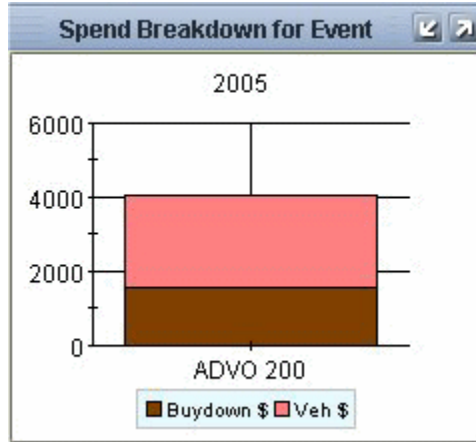
Cost Benefit Review

This window presents a detailed cost benefit analysis for each event in the currently selected scenario. Details include profitability metrics from both the manufacturer and retailer's perspective, overall event spend, cost per incremental unit (CPIU), and payment type. Here you can control the status of the event.

Cost Benefit Review											
T1-World Brands Comb - Albertsons - ANALGESICS - ADVO 200 - Actuals											
Promotion	Ttl Evt $	Incr Evt $	Mfg Profit	Incr Mfg Prft	Rtl Prft	Incr Rtl Prft	Evt Spend	CPIU	% Spend	Pay Type	Evt Status
July 4th sale	$38,835	$27,972	$17,442	$11,424	$10,288	$7,218	$4,074	$1.08	10%	Bill Back	g. Closed

The incremental manufacturing profit is the additional profit that the manufacturer earns because of the promotion, *in addition to the base profit* that would be earned even without a promotion. The incremental retailer profit is analogous.

Fund Allocation

This window displays the allocated funding for each event in the currently selected scenario. Here you allocate the promotional costs between the MDF and BDF funds.

Fund Allocation					
T1-World Brands Comb - Albertsons - ANALGESICS - ADVO 200 - Actuals					
Promotion	Evt Spend	MDF Alloc %	MDF Alloc	BDF Alloc %	BDF Alloc
July 4th sale	$4,074	50%	$2,037	50%	$2,037

Possible Actions

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

- Edit a promotion, by changing the sale price and other properties. You can also right-click a promotion and select Edit to access other properties.

- Copy and paste promotions. See Copying and Pasting a Promotion, page 7-15.

- Delete promotions. See Deleting a Promotion, page 7-16.

- Run simulations. See Running a Simulation, page 9-3. Note that this worksheet does not contain the data needed to find cannibalization.

- Run optimization. See Optimizing a Promotion, page 9-4.

- Right-click on a promotion and open other worksheets filtered to this promotion. For example, see Examining Promotions from a Retailer's Point of View, page 10-6 .

- Right-click on a scenario and open the PMO: Promotion Comparison worksheet filtered to that scenario. See Comparing Promotions in a Scenario, page 10-8.

Creating a Promotion

Security Restrictions

The new promotion method is only displayed if the promotion level in the component is set to Write or Full Control access. Your member security settings determine the populations on which you can define the new promotion.

To create a promotion

1. Open the Planning Environment; see "Introduction to the Planning Environment".

2. At the top of the screen, select the territory, retailer, category, and then promotion group with which you want to create the promotion.

3. In the Event Planner window, right-click an existing promotion and then select New Promotion.

   Oracle Demantra displays the following screen:

4. For Name, specify a name for this promotion.

5. The Population area shows the currently selected combinations with which the new promotion will be associated.

   The default combinations are taken from the current selection in the worksheet. To change them, see "To reassign a promotion to a different item or location".

6. The Start and End dates are controlled by default settings. Edit them as needed.

7. Specify values for the other attributes as appropriate:

Start Ship, End Ship	Optionally specify when the product will be shipped for the promotion. You might specify this information later, when the promotion is more certain.
Scenarios	Choose Sandbox.
Cons Promo	Specify the type of consumer overlay, if any. This affects the number of Units. For example, if Cons Promo is a two-for-one deal, then Units becomes 2.

8. Click Create. The new promotion is created and is displayed in the Event Planner window. It has a default cost based on the vehicle type you specified.

9. Specify the Sale Price for use during the promotion.

10. Specify the costs for this promotion:

   1. If the Veh Type is incorrect, change it, save the data and rerun the worksheet. Then PTP puts the default fixed cost for the new vehicle type into the Veh $ series.

   2. Optionally edit Veh $, if the fixed cost for this promotion is different from the default.

   3. For Buydown, specify the discount per promoted unit that will be paid to the retailer.

11. Click Data > Save Data.

Because this promotion is unplanned, it is considered hypothetical and does not have an impact on the promotion funds or on the forecast.

See also

"Duplicating a Promotion"

"Copying and Pasting a Promotion"

Marking a Promotion as Planned

Before you mark a promotion as planned, you may want to run simulation, optimization, or both, as described in "PMO: Simulation and Optimization."

Before marking a promotion as planned, you also generally examine the promotion to be sure you have chosen the best vehicle type and so on. You may want to create several tentative promotions (all in the Sandbox scenario) and view them side by side. See

"PMO: Examining and Comparing Promotions."

To mark a promotion as planned

1. In the Fund Allocation window, change MDF Alloc % as desired. This specifies the percentage of the event that is funded by MDF. Enter 50 for 50%, for example.

   The remainder is automatically funded by BDF, as PTP automatically computes BDF Alloc % and BDF Alloc.

2. In the Cost Benefit Review window, change the Evt Status of the promotion to Planned.

3. Right-click the promotion and then select Edit Promotion.

4. Change Scenarios to Current Year.

5. Click OK.

6. Click another promotion in the worksheet. PTP automatically updates the details for the newly planned promotion. Notice that the promotion now consumes funds and has an impact on sales projections.

Approving a Promotion

To approve a promotion

1. In the Event Planner window, change the Evt Status to Approved.

2. Click Data > Save Data.

3. Rerun the worksheet.

Committing a Promotion

You commit a promotion when you have a firm commitment from the retailer to run the promotion. When you commit a promotion, PTP takes a snapshot of the current state of the promotion, for use in later analysis. The committed promotions are included in all projections. PTP also freezes the promotion at this point, so that you cannot change its properties (apart from advancing the status further).

To commit a promotion

1. In the Event Planner window, change the Evt Status to Committed.

2. Click Data > Save Data.

3. Optionally, to see the projections that PTP has just captured, use the PMO: Promo-Evaluation: Mfg or PMO: Promo-Evaluation: Rtl worksheet. See "PMO: Reviewing Past Performance."

Marking a Promotion as Partially Paid or Paid

To mark a promotion as paid

1. Open the Planning Environment; see "Introduction to the Planning Environment."

2. In the Event Planner window, change the Evt Status to Partial Paid or Paid.

3. Click Data > Save Data.

4. Rerun the worksheet.

Closing a Promotion

To close a promotion

1. Open the Planning Environment; see "Introduction to the Planning Environment".

2. In the Event Planner window, change the Evt Status to Closed.

3. Click Data > Save Data.

4. Rerun the worksheet.

Making Other Changes to a Promotion

Security Restrictions

The Edit promotion method is only enabled for promotions that have Read and Write or Full Control security access. The component level security access must also be Write or Full Control.

•   If your security access level is Read Only, you cannot edit a promotion

•   If your security access level is Read & Write or Full Control, but the promotion level is Read Only, it cannot be edited

> **Note:** Before you change a promotion, you should change its status back to Unplanned. After making your change, restore the previous status. This procedure ensures that Demantra triggers all internal processes as needed.

To modify a promotion

1. In the Event Planner window, edit any details in the row corresponding to the promotion.

2. Click Data > Save Data.

3. If you changed the Veh Type, rerun the worksheet to see the new default cost of this promotion.

To rename a promotion

1. Right-click it and click Edit.

2. Type a new name and click OK.

To reassign a promotion to a different item or location

You can reassign an unplanned promotion to associate it with a different territory, retailer, item, or Ship To, as needed.

> **Important:** You must create both a Refresh Population workflow and method before executing this procedure. First, create a Refresh Population workflow that contains only the Refresh Population workflow step. Then create the Refresh Population method on the Promotion level without any input or output arguments and link it to the Refresh Population workflow.

1. Right-click a promotion and click Edit.

2. Click Edit below the Population area.

   The Edit Population dialog box is displayed.
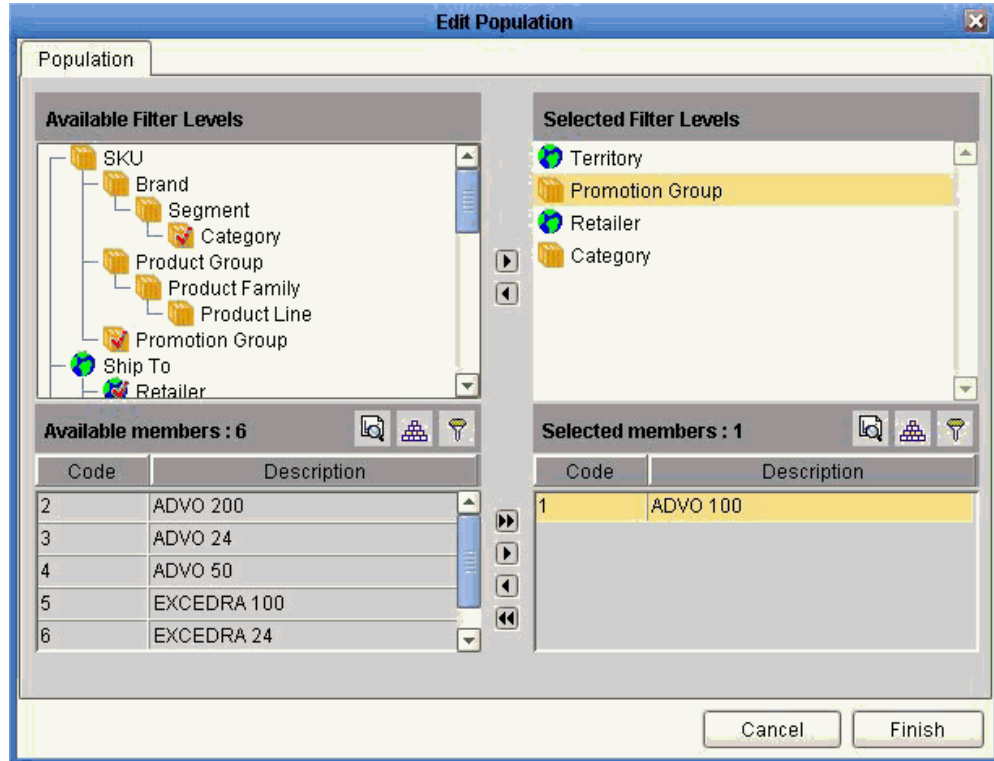
Usually a promotion is associated with a territory, retailer, category, and promotion group.

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

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

1. In Selected Filter Levels, click Promotion Group.

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

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

3. Repeat as necessary.

4. Click Finish to exit this dialog box.

5. From the TPM: Planning Environment worksheet, right-click on the promotion group you have modified.

6. Choose the Refresh Population method from the menu.

7. Rerun the worksheet to see the changes.

See Also

- "Refresh Population Workflow Step" in the Oracle Demantra Implementation Guide for more information about configuring the Refresh Population workflow step.

- "System Parameters" in the Oracle Demantra Implementation Guide for more information about the CopyPasteIntersect system parameter which determines how volume is distributed when an item is moved from one promotion group to another.

- "Specifying Data Properties of a Series" in the Oracle Demantra Implementation Guide for more information about how to configure the Copy/Paste preservation Type series setting.

Duplicating a Promotion

The Duplicate method enables you to duplicate an existing promotion with the same duration and population (item/location). All attributes and series remain the same as the original except for the name of the promotion, its event status and starting date. If you want to perform a context sensitive copy of a promotion from one account to another and substitute accounts, use the Copy/Paste procedure instead. The Duplicate method only works on the promotion level.

To duplicate a promotion

1. Start in the TPM: Planning Environment worksheet. A list of scenarios and promotions are displayed.

2. Right-click a promotion and choose Duplicate from the methods menu. The Duplicate Promotions form appears.

3. Input the following information about the duplicate promotion:

Field name	Description
Name	The promotion name.

Field name	Description
Event Status	The status of the event. Options include: • a. Unplanned • b. Planned • c. Approved • d. Committed • e. Partial Paid • f. Paid • g. Closed
Start Event	The starting date for the promotion event. A calendar is available to assist you. If you do not specify a starting date for the promotion event, it will default to the date used for the original promotion. **Note:** If you specify the start date of the promotion, the duration of the promotion remains the same as the original promotion.

> **Note:** Only the values of those attributes that appear in the Duplicate Promotions form can be changed during the duplication process. All other attributes remain the same as the original. The fields in the Duplicate Promotions form can be modified in the Business Modeler by the Administrator to include additional attributes except Population. For more information about how to customize the duplicate promotions method, see "Configuring Methods" in the Demantra Implementation Guide. If you want to change the population, create a new promotion or copy and paste a promotion.

4. Check the Save Parameters option if you want to customize the form's defaults.

5. Click Duplicate Promotion. The new promotion appears in the worksheet.

Copying and Pasting a Promotion

The copy method is only enabled if the promotion level in the component is set to Write or Full control access.

The paste method is only enabled if the promotion level in the component is set to Write or Full Control access and you have access to the target population. If you only have partial access to the target population, the paste method is displayed, but when the method is executed, members with Read Only access levels are removed from the population.

- Replace the population (for example, copying a promotion from ABC Company to XYZ Company replaces the account).

- Change the promotion duration. The data is adjusted to make the new promotion similar to the original promotion.

Security Restrictions

You can copy and paste in any level that has Write or Full Control, regardless of user security restrictions. This means that everyone can copy and paste promotions, as long as the level's access status is not Read Only, in which case no user can copy and paste promotions.

To copy and paste a promotion

1. You typically start in the Planning Environment; see "Introduction to the Planning Environment".

2. In the Event Planner window, right-click a promotion and click Copy.

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

3. Right-click and then select Paste.

    Oracle Demantra displays a dialog box that asks for details about the copy.

4. Specify one of the following:
    - To shift the dates of the newly copied promotion, specify a number in the Shift By field. The copy will be shifted later in time by the specified amount, but will last for the same length of time. You can use any integer, including negative number or zero.

- To specify a different start and end date, specify values in the From and To fields.

- To make the new promotion span the entire length of time used in the worksheet, select Worksheet Derive.

5. Click OK.

6. When prompted for a new promotion name, type the name and click OK.

Deleting a Promotion

Security Restrictions

You can only delete a promotion if the promotion level at the component level is set to Full Control and you also have Full Control access to the promotion

To delete a promotion

1. You typically start in the Planning Environment; see "Introduction to the Planning Environment."

2. In the Event Planner window, right-click a promotion and click Delete.

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

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

4. Rerun the worksheet to see the change.

Reference

Planning Environment

Basics

Accessing this worksheet	• In My Worksheets (in Collaborator Workbench), click Planning Environment.
	• If a worksheet is currently open, click File > Open. Click Planning Environment and then click Open.
Levels you can select	Territory, Retailer, Category, Promotion Group
Levels used in cross tabulation	Scenario, Promotion
Time aggregation	Yearly

Business Data

View	Series	Description
Sales % vs Quota (Base + Viewed Events)	Sales Quota	Sales quota (revenue)
	% Attained	Percentage of sales quota attained
	$ Sales Proj	Planned sales dollars: actuals plus forecast
Fund Balances	MDF Auth	Authorized market development funds, calculated as follows: (base rate + dev rate)*volume + fixed MDF funds
	MDF Bal	Remaining market development funds, calculated as the authorized MDF less the spent or committed funds
	BDF Auth	Authorized brand development funds+D75
	BDF Bal	Remaining brand development funds, calculated as the authorized BDF less the spent or committed funds
	Slot Auth	Authorized slotting funds

View	Series	Description
	Slot Bal	Remaining slotting budget, accounting for the part that has been spent
	Unmatched $	Trade spend not yet matched to a promotion.
	Ttl Fund Auth	Total authorized spending, including MDF, BDF, and slotting
	Ttl Fund Bal	Remainder of total authorized spending, after accounting for spending
Event Planner	Start Ship	Date when product will start to ship
	End Ship	Date when shipments will end for the event
	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion
	Veh $	Vehicle cost for the promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer
	Sale Price	Sale price per unit at shelf
	Units	Number of units in the deal to the consumer. Usually equal to 1. Use 2 for 2-for-1 sales, for example.
	Buydown	Buydown allowance per unit, discount offered to retailer for running the event

View	Series	Description
	Lift	Lift factor for the promotion
	Base Evt Vol	Base volume during the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt Vol	Total volume for the promotion
Sales Breakdown for Event	Base Evt Vol	Base volume during the promotion
	Incr Evt Vol	Incremental volume due to the promotion
Cost Benefit Review	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Mfg Profit	Manufacturer's profit from the event
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion
	Rtl Prft	Retailer's profit from the event
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Evt Spend	Total planned spending for promotion, sum of buydown, vehicle costs, and slotting
	CPIU	Event cost per incremental unit sold as a result of the promotion.
	% Spend	Event spending, as a percentage of event sales

View	Series	Description
	Pay Type	Indicates the payment terms between the manufacturer and the retailer for this promotion
	Evt Status	Current status of the promotion
Spend Breakdown for Event	Buydown $	Buydown spend for the promotion
	Veh $	Vehicle cost for the promotion
Fund Allocation	Evt Spend exS	Total planned buydown and vehicle costs for promotion
	MDF Alloc %	Market development funds, as a percentage of total plan spending (excluding slotting costs).
	MDF Alloc	Allocated market development funds, based on the percentage set by the planner
	BDF Alloc %	Brand development funds, as a percentage of total plan spending (excluding slotting costs)
	BDF Alloc	Allocated brand development funds, based on the percentage set by the planner

8

PMO: Promotion Calendars

Overview

Promotion calendars graphically display promotions in an interactive calendar, as seen here below:
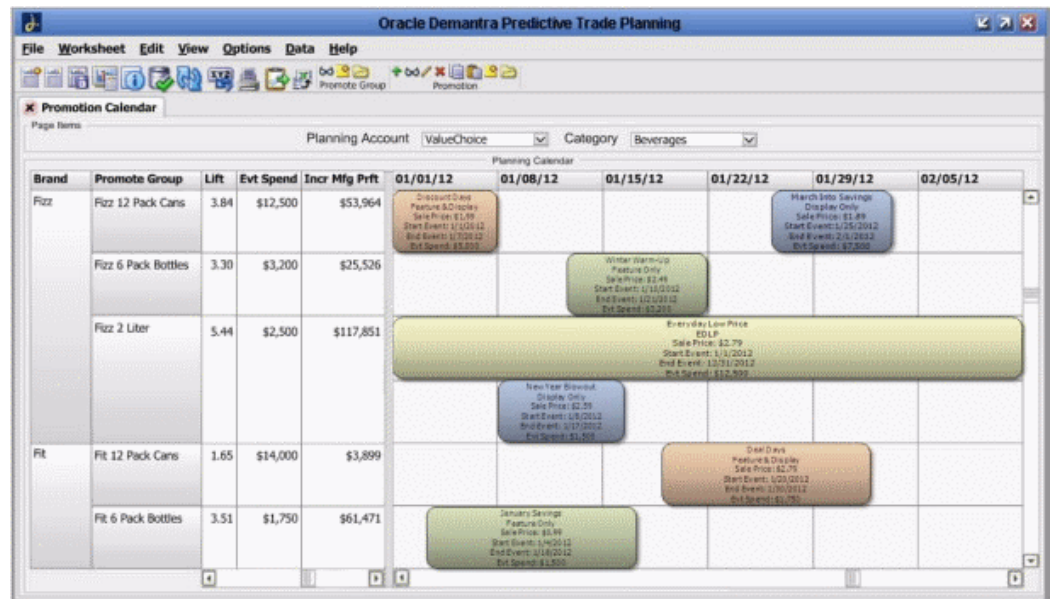
In a promotion calendar, levels, table and calendar are combined into a single view. In the example above, a Promotion Calendar is configured to display the Brand and Promote Group levels. The right side of a promotion calendar displays promotions across configurable units of time. In the example above, time is displayed in a weekly format.

- Each promotion appears as a separate box in the calendar, and each may display several series and their values (for example, Vehicle Type, Start and End Event dates, Event Spend).

- Multiple promotions may appear in the same row and their start and end dates may overlap.

- Promotion calendars must be defined manually using PLSQL. For more information, see the Oracle Demantra Implementation Guide.

  > **Note:** Time and Promotion levels are not displayed when a promotion calendar is added to a worksheet. Data in a series is aggregated across all combinations and dates of a promotion in a single row.

Opening a Promotion Calendar

To open a promotion calendar:

1. In a worksheet, open the Worksheet Designer.

2. In the Layout area, right-click on any level that has a promotion calendar.

3. Select the promotion calendar and click OK.

4. All available calendar views for the selected level are displayed.

5. Click on one of the calendar views.

  > **Note:** If you right-click on a level and Calendar View is disabled, this means that no calendar views have been configured for that level.

See Also:

"Defining a Promotion Calendar" in the *Oracle Demantra Implementation Guide Supplement*

Working with Promotions in the Promotion Calendar

Right-clicking a promotion in a promotion calendar displays the same Methods menu as when you right-click a level member in a worksheet. For example, if Promotions are displayed in boxes in your Calendar, then the same menu for the Promotion Level are displayed when you right-click a promotion in the Calendar.

Viewing the Details of a Promotion

To view the details of a promotion in a promotion calendar, do one of the following:

- Hover your mouse over a promotion

- Right-clicking on a promotion and select View Promotion

- If View Promotion is defined as a menu option, click the View Promotion button on the menu bar

The information displayed when you hover your mouse over a promotion is configurable.

See Also:

"Defining a Promotion Calendar" in the *Oracle Demantra Implementation Guide Supplement*

Creating New Promotions in the Promotion Calendar

To create a new promotion in a promotion calendar, do one of the following:

- Double-click on an empty cell

- Right-click on a promotion and select New Promotion

- If New Promotion is defined as a menu option, click the New Promotion button on the menu bar

Any of these actions will launch the New Promotion creation process.

See Also:

"Creating a Promotion"

Editing Promotions in the Promotion Calendar

To edit a promotion in a promotion calendar, do one of the following:

- Double-click on a promotion

- Right-click on a promotion and select Edit Promotion

- If Edit Promotion is defined as a menu option, click the Edit Promotion button on the menu bar

Any of these actions will enable you to edit a promotion directly from a promotion calendar.

Due to user security restrictions, you might be prevented from making changes in a promotion calendar, regardless of the promotion's status.

See Also:

"Defining a Promotion Calendar" in the *Oracle Demantra Implementation Guide Supplement*.

You can change the timing of a promotion by moving or resizing it in a promotion calendar. You can only move promotions which have a status of Unplanned or Planned.

To automatically update the start and end date of a promotion, drag a promotion box to a different time period on a promotion calendar or extend either side of the promotion box.

- Dragging the left border of the promotion box updates the start date of the promotion

- Dragging the right border of the promotion box updates the end date of the promotion

> **Note:** The minimum duration for a promotion is one day.

See Also:

"Making Other Changes to a Promotion"

Deleting Promotions in the Promotion Calendar

To delete a promotion from a promotion calendar, do one of the following:

- Click on a promotion and press the Delete key on the keyboard

- Right-click a promotion and select Delete Promotion

- If Delete Promotion is defined as a menu option, click the Delete Promotion button on the menu bar

Other available right-click options include Open With, Copy, Paste, Duplicate and Optimize.

See Also:

- "Copying and Pasting a Promotion"

- "Duplicating a Promotion"

- 'Optimizing a Promotion"

Promotion Calendar Views and Options

Configurable Calendar Views

Oracle Demantra contains no predefined calendar views. System administrators can define Promotion Calendar definitions by updating tables with a tool such as SQL Developer.

See Also:

"Defining a Promotion Calendar" in the *Oracle Demantra Implementation Guide Supplement*.

Specifying Time Granularity

Use worksheet tables to change the time granularity displayed on a promotion calendar.

See Also:

"Configuring Calendar Views" in the *Oracle Demantra Implementation Guide Supplement*

You can also change the time granularity by right-clicking the header at the top of the Promotion Calendar. Available options are as follows:

- Year

- Month

- Week

- Day

9

PMO: Simulation and Optimization

This chapter covers the following topics:

- Overview
- Running the Analytical Engine in Simulation Mode
- Running a Simulation
- Optimizing a Promotion
- Viewing Optimization Results
- Accepting an Optimized Promotion
- Reference

Overview

Before you mark a promotion as planned (or before you commit a promotion), you may want to run a simulation on it, or run the optimizer, or both. This chapter describes how to perform these tasks. It includes the following sections:

You may also want to examine the promotion in detail or create several tentative promotions (all in the Sandbox scenario) and view them side by side. See PMO: Examining and Comparing Promotions - Comparing Promotions in a Scenario, page 10-8.

A qualified user or administrator typically runs the Analytical Engine periodically in batch mode to generate a forecast for all items and locations in the system. The forecast data includes total volume, base volume (volume in the absence of promotions), incremental volume, pre- and post-promotional volume, and volume due to cannibalization.

To see an immediate forecast for a newly entered promotion, however, you do not have to wait for the next batch run, You can simply run a simulation, which considers only one promotion. With the forecasted numbers, you can see the effect on quota, accruals, spending, and so on. Likewise, if you change the properties of a promotion, you can run

a simulation to see the resulting forecast.

Also, to help you find the most effective promotion for your needs, PTP provides the ability to optimize a promotion. The Promotion Optimization module uses the previously stored results of the Analytical Engine. You provide a specific goal and constraints, and the optimizer determines the best set of promotion properties. PTP provides a worksheet for viewing the optimized results, which you can then accept, if these results meet your needs.

In principle, you can run simulation or optimization anywhere PTP displays future promotions. Then you can open another worksheet filtered to your promotion to see further details. Or you can first open that worksheet and then run simulation or optimization. Several worksheets are useful for these purposes.
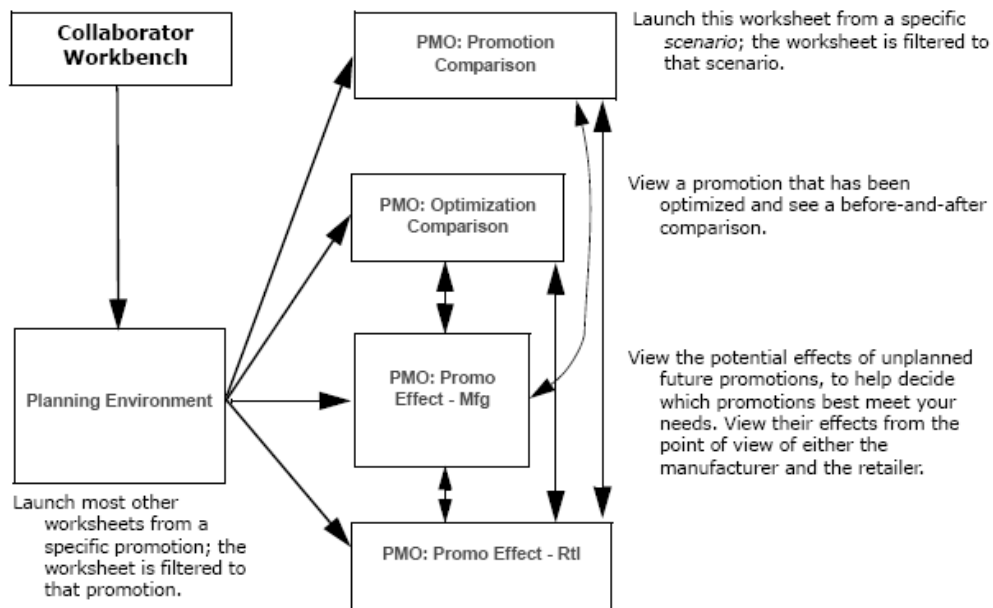
The path you choose depends on what meets your needs at any time, but consider the following general principles:

- If you run a simulation in the Planning Environment or the PMO: Optimization Comparison worksheet, the engine does not have the data needed to see cannibalization, which means that you may need to rerun simulation later in a different worksheet. If you run simulation in the other worksheets (PMO: Promotion Comparison, PMO: Promo Effect - Mfg, and PMO: Promo Effect - Rtl), the Analytical Engine can find cannibalization.

- The PMO: Optimization Comparison worksheet is the only place that displays optimization results.

> **Note:** Before you can perform either simulation or optimization, it

is necessary to run the Analytical Engine in batch mode once in your application. See Running Required Workflows, page 14-2.

Running the Analytical Engine in Simulation Mode

Before you can perform simulations, you must start the Analytical Engine in simulation mode. Note that an error will occur if the Analytical Engine has not been run previously in batch mode.

To run the engine in simulation mode

1. Click Start > Programs.

2. Click Demantra > Demantra Spectrum release > Simulation Engine.

Running a Simulation

You can run a simulation to get a forecast for a promotion, particularly a newly created promotion or a promotion that you have just changed.

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

To run a simulation

1. Make sure the Analytical Engine is running in simulation mode; see Running the Analytical Engine in Simulation Mode, page 9-3.

2. Start in the Planning Environment worksheet.

3. Right-click a promotion and launch a worksheet, such as PMO: Promo Effect - Mfg or PMO: Promo Effect - Rtl.

   > **Note:** In principle, you can run a simulation in any worksheet. Note that if you run a simulation in the Planning Environment worksheet, however, the engine does not have the data needed to see cannibalization.

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

   The Select Simulation Type page appears.
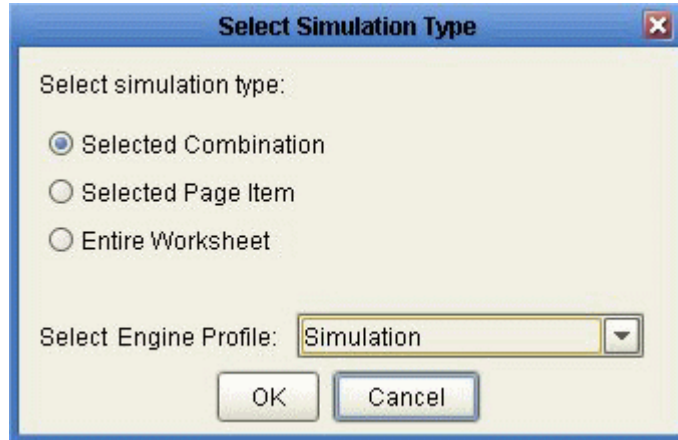
5. Click Selected Combination.

6. For Select Engine Profile, click Simulation.

7. Click OK.

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

8. When the simulation is complete, Oracle Demantra displays a message. Click OK.

9. Rerun the worksheet.

10. Examine the results.

11. To accept the results, click Data > Accept Simulation.

Optimizing a Promotion

If you need to find the best possible promotion, license Oracle Demantra Trade Promotion Optimization (TPO).

PTP provides an optimizer that you can use to find the best possible promotion to maximize revenue, profit, or units. It considers constraints such as the following:

• Retailer-specific details such as minimum needed retailer event margin. You can override the retailer's default event margin if needed.

• Maximum budget and buydown for this promotion.

• Basics such cost of goods, list price, and so on.

If you need more control of the analytical engine and use Oracle Demantra Trade Promotion Optimization, you can use its advanced analytics capability.

To optimize a promotion

Note: Before you can optimize a promotion you must set certain parameters and other setup tasks. For more information, see Configuring Promotion Optimization for Predictive Trade Planning in the Demantra Implementation guide.

1. You typically start in the Planning Environment or the PMO: Optimization Comparison worksheet. See Introduction to the Planning Environment, page 7-1 and Viewing Optimization Results, page 9-7.

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

   PTP displays the Optimize Promotion 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. If you leave this unspecified, there is no maximum budget.

Optimization Range Start, Optimization Range End	If these are blank, Promotion Optimization assumes that you want the optimized promotion to fall within the span of time of the original promotion. If you want Promotion Optimization to search for a better time for this promotion, use these parameters to specify the range of time for optimization to consider.
Buydown Generation Method	Specify whether Promotion Optimization should use the buydown that you have already entered or calculate an optimal buydown for this promotion.
Max Buydown	Maximum allowed buydown for this promotion. If Promotion Optimization calculates an optimal buydown, the buydown will not exceed this value.
Min Rtl Margin Override	Minimum margin that the retailer must make on this promotion, as specified in this retailer's profile. Use this parameter to override that value, if needed. Use a value greater than 0 and less than or equal to 1.

4. Click Optimize.

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

   When optimization is complete, PTP displays a message that indicates the status of the optimization and the number of iterations that it ran. (You may not see this message, depending on how PTP is configured.)

   Then PTP asks if you want to rerun the worksheet.

5. Click OK.

6. If you are not yet in the PMO: Optimization Comparison worksheet, right-click the promotion and open that worksheet. See Viewing Optimization Results, page 9-7.

Viewing Optimization Results

To view optimization results

If you are not yet in the PMO: Optimization Comparison worksheet, right-click the promotion and click Open With > PMO: Optimization Comparison.
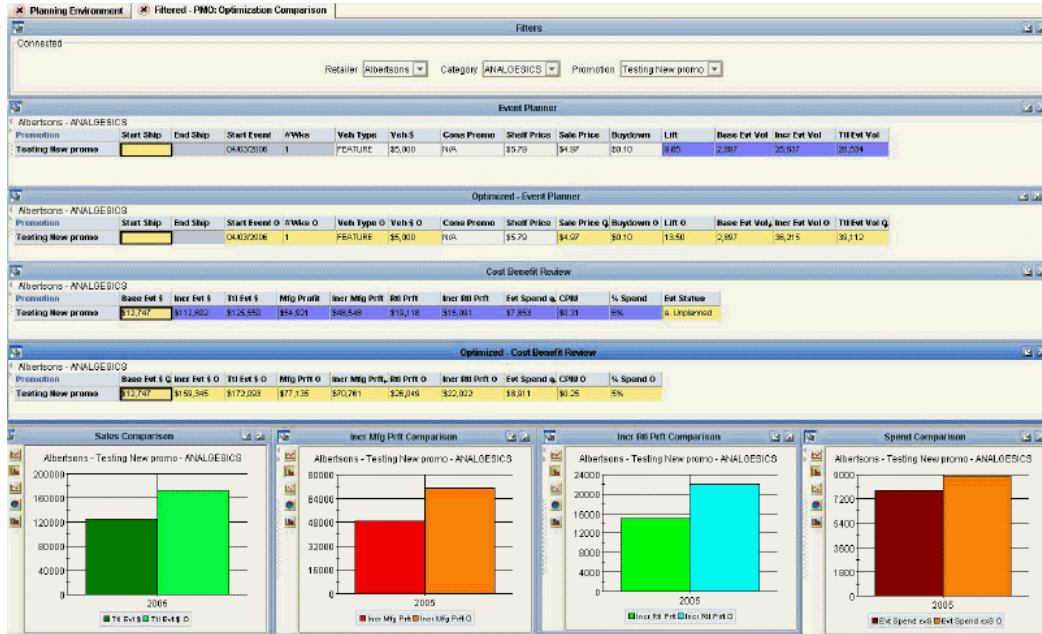
The PMO: Optimization Comparison worksheet provides the capability to view the optimization results (shown in yellow) and compare them to the current state of the promotion, to help you decide if you want to accept this optimization. This worksheet contains the following information.

Event Planner and Optimized Event Planner

These windows provide details of the events, including start and end ship dates, vehicle type, vehicle cost, buydown, base volume and incremental volume. Incremental volume is generated by Oracle Demantra's comprehensive analytical engine.

The Event Planner window shows these details for the actual promotion as it currently is. The Optimized - Event Planner window shows the details of the optimized promotion. If you accept the optimization, these details are moved to the actual promotion.

Notice that the values are given right below the original values of the promotion to facilitate easy comparison.

If you have not yet optimized this promotion, the Optimized - Event Planner window is empty.

Cost Benefit Review and Optimized - Cost Benefit Review

These windows display a detailed cost benefit analysis, including profitability metrics from both the manufacturer and retailer's perspective, overall event spend, cost per incremental unit (CPIU), and so on. The Cost Benefit Review window displays these details for the actual promotion as it currently is. The Optimized - Cost Benefit Review window shows the details of the optimized promotion. If you accept the optimization, these details are moved to the actual promotion.

Here notice that the color of the Evt Status series (upper window only) indicates the optimization status of this promotion:

- White means that the promotion has not been optimized.

- Yellow means that the promotion has been optimized.

- Green means that the promotion has been optimized and accepted, so that the promotion is using the optimization results.

If you have not yet optimized this promotion, the Optimized - Cost Benefit Review window is empty.

Graphs

This worksheet also provides the following graphs:

- Sales Comparison: Compares the total event dollars generated before and after optimization.

- Incr Mfg Prft Comparison: Compares the incremental manufacturing profit generated before and after optimization. This is the additional profit that the manufacturer earns because of the promotion, in addition to the base profit that would be earned even without a promotion.

- Incr Rtl Prft Comparison: Compares the incremental retailer profit generated before and after running optimization. This is the additional profit that the retailer earns because of the promotion, in addition to the base profit that would be earned even without a promotion.

- Spend Comparison: Compares the event spend before and after running

optimization.

If you have not yet optimized this promotion, each of these graphs includes only one bar, corresponding to the promotion in its current state.

Possible Actions

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

- Edit a promotion, by changing the sale price and other properties. You can also right-click a promotion and select Edit to access other properties.

- Run simulations. See Running a Simulation, page 9-3.

- Run or rerun optimization. See Optimizing a Promotion, page 9-4.

- Use the right-click menu to open other worksheets filtered to this promotion.

Accepting an Optimized Promotion

After you optimize a promotion, you can accept it. You can do this in any worksheet that displays promotions. For example, you can start in the PMO: Optimization Comparison worksheet.

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

To accept an optimized promotion

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

   If you accept the optimization, the attributes of the optimized promotion are copied into the original promotion. Also notice that the color of the Evt Status series changes to green, to indicate that optimization has been accepted.

2. Optionally rerun simulation for a new net-lift analysis; see Running a Simulation, page 9-3.

3. Optionally right-click the promotion and launch either PMO: Promo Effect - Mfg or PMO: Promo Effect - Rtl.

   See

   - PMO: Examining and Comparing Promotions - .Examining Promotions from the Manufacturer's Point of View, page 10-2

- PMO: Examining and Comparing Promotions - Examining Promotions from the Retailer's Point of View, page 10-6.

Reference

PMO: Optimization Comparison

Basics

Accessing this worksheet	Right-click a promotion and click Open With > PMO: Optimization Comparison.
Levels you can select	Territory, Retailer, Promotion
Levels used in cross tabulation	Promotion Group, Scenario
Time aggregation	Yearly

Business Data

View	Series	Description
Event Planner	Start Ship	Date when product will start to ship
	End Ship	Date when shipments will end for the event
	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion
	Veh $	Vehicle cost for the promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer

View	Series	Description
	Sale Price	Sale price per unit at shelf
	Buydown	Buydown allowance per unit, discount offered to retailer for running the event
	Lift	Lift factor for the promotion
	Base Evt Vol	Base volume during the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt Vol	Total volume for the promotion
Optimized - Event Planner	Start Ship	Date when product will start to ship
	End Ship	Date when shipments will end for the event
	Start Event O	Date when optimized promotion starts in stores
	# Wks O	Event length in whole weeks, assuming that each week starts on Monday, for optimized promotion
	Veh Type O	Vehicle type or event type of the optimized promotion
	Veh $ O	Vehicle cost for the optimized promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer
	Sale Price O	Sale price per unit at shelf, for the optimized promotion
	Buydown O	Buydown allowance per unit, for optimized promotion
	Lift O	Lift factor for the optimized promotion

View	Series	Description
	Base Evt Vol O	Base volume for optimized promotion
	Incr Evt Vol O	Incremental volume due to the optimized promotion
	Ttl Evt Vol O	Total volume for the optimized promotion
Cost Benefit Review	Base Evt $	Base sales for the manufacturer, during the promotion
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Mfg Profit	Manufacturer's profit from the event
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion
	Rtl Prft	Retailer's profit from the event
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Evt Spend exS	Total planned buydown and vehicle costs for promotion
	CPIU	Event cost per incremental unit sold as a result of the promotion.
	% Spend	Event spending, as a percentage of event sales
	Evt Status	Current status of the promotion
Optimized - Cost Benefit Review	Base Evt $ O	Base sales for manufacturer, for optimized promotion

View	Series	Description
	Incr Evt $ O	Incremental sales to the manufacturer due to the event, for the optimized promotion
	Ttl Evt $ O	Total sales during the promotion, for the manufacturer (for the optimized promotion)
	Mfg Prft O	Manufacturer's profit from the optimized event
	Incr Mfg Prft O	Incremental profit to the manufacturer due to the optimized promotion
	Rtl Prft O	Retailer's profit from the optimized event
	Incr Rtl Prft O	Incremental profit to the retailer due to the optimized promotion
	Evt Spend exS O	Total planned buydown and vehicle costs for optimized promotion
	CPIU O	Event cost per incremental unit sold as a result of the promotion, for optimized promotion
	% Spend O	Event spending, as a percentage of event sales, for optimized promotion
Sales Comparison	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Ttl Evt $ O	Total sales during the promotion, for the manufacturer (for the optimized promotion)
Incr Mfg Prft Comparison	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion
	Incr Mfg Prft O	Incremental profit to the manufacturer due to the optimized promotion
Incr Rtl Prft Comparison	Incr Rtl Prft	Incremental profit to the retailer due to the promotion

View	Series	Description
	Incr Rtl Prft O	Incremental profit to the retailer due to the optimized promotion
Spend Comparison	Evt Spend exS	Total planned buydown and vehicle costs for promotion
	Evt Spend exS O	Total planned buydown and vehicle costs for optimized promotion

10

PMO: Examining and Comparing Promotions

This chapter covers the following topics:

- Overview

- Examining Promotions from the Manufacturer's Point of View

- Examining Promotions from a Retailer's Point of View

- Comparing Promotions in a Scenario

- Reference

Overview

This chapter describes how to examine and compare promotions, to help you choose the best promotion for your needs. It includes the following sections:

Before you mark a promotion as planned (or before you commit a promotion), you generally examine the promotion to be sure you have chosen the best vehicle type and so on.

To evaluate promotions, you generally start in the Planning Environment worksheet. From there, you right-click a promotion and launch any of the relevant PMO worksheets to see data for that promotion.
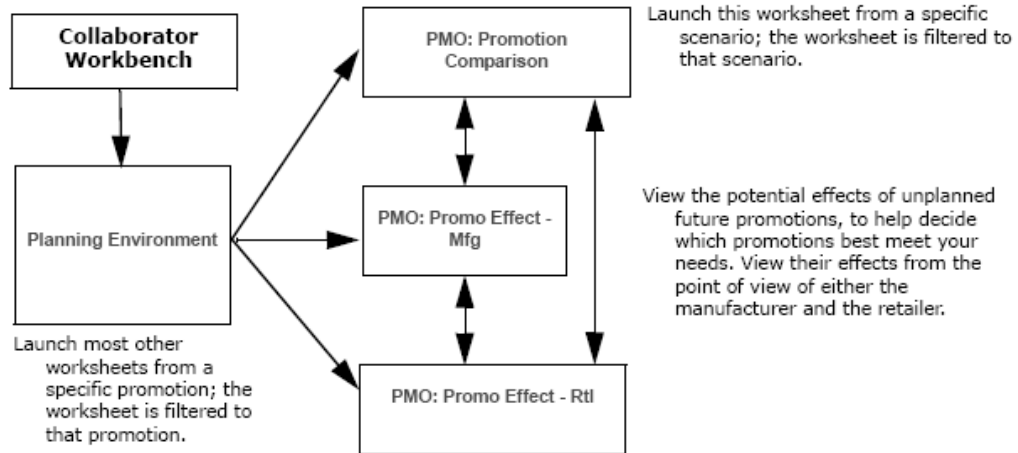
Or, to compare multiple promotions, you right-click a scenario and launch a worksheet to view the promotions in that scenario side-by-side. As shown here, you can also open one worksheet from another, to look at the same promotion in a different way.

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

Examining Promotions from the Manufacturer's Point of View

To evaluate a future promotion from the manufacturer's point of view

1. You typically start in the Planning Environment; see Introduction to the Planning Environment, page 7-1.

2. In the Event Planner window, right-click a promotion and click Open With > PMO: Promo Effect - Mfg.

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

The system displays the PMO: Promo Effect - Mfg worksheet, filtered to display just the promotion that you right-clicked.
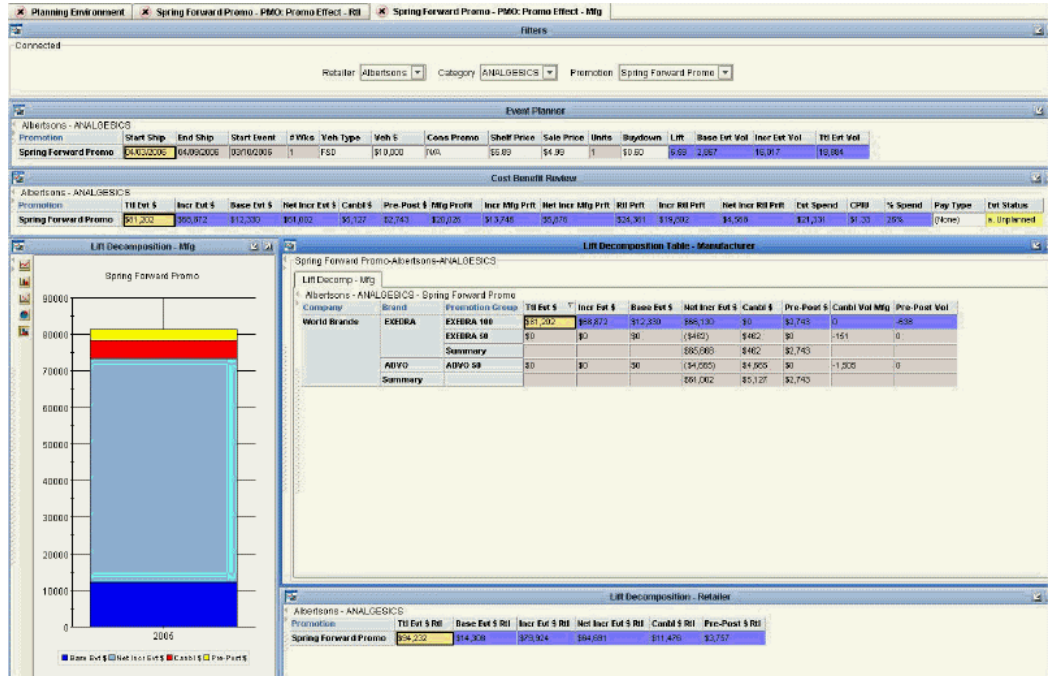
This worksheet includes the following areas.

Event Planner

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

Cost Benefit Review

This window is similar to the Cost Benefit Review window in the Planning Environment worksheet. It displays a detailed cost benefit analysis, including profitability metrics, overall event spend, and cost per incremental unit (CPIU).

Lift Decomposition Graph - Manufacturer

This window shows the effects of the promotion, from the perspective of the manufacturer.
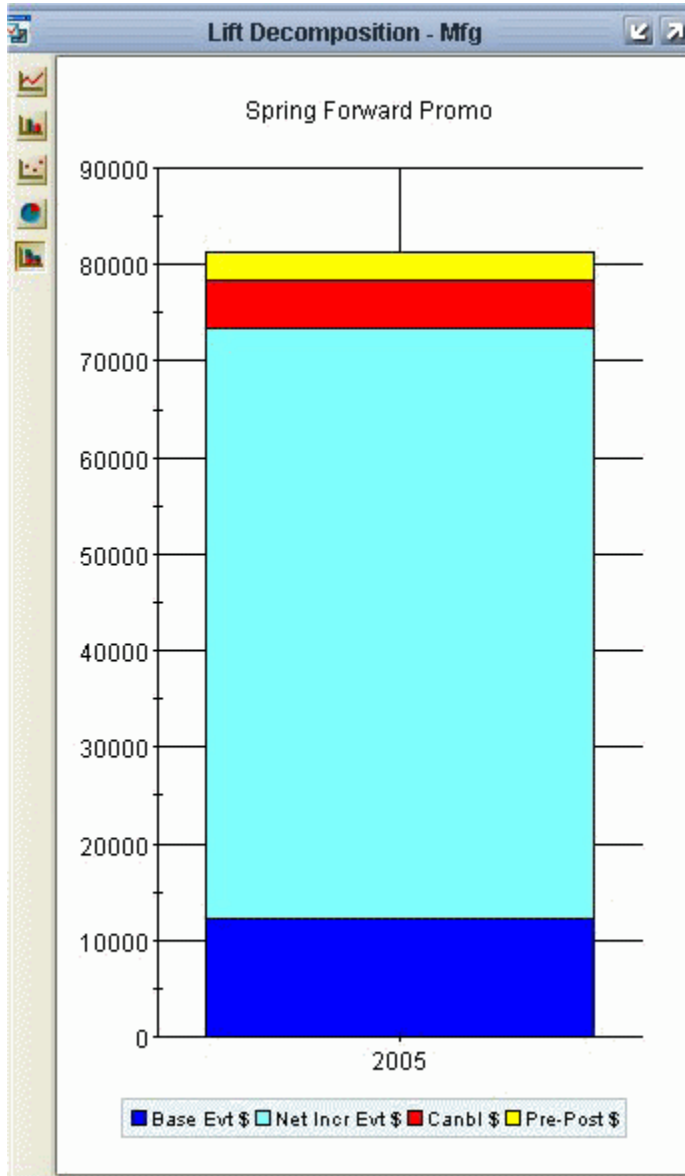
Four series are shown here:

- Base Evt Value is the base money earned by the manufacturer over the course of the promotion. This money would have been earned even without the promotion.

- Canbl Value P is the net additional money earned by the manufacturer as a result of the promotion; this accounts for both cannibalization and pre- and post-effects.

- Canbl $ is the money lost by the manufacturer due to cannibalistic effects of the promotion. For display purposes only, this is shown as a positive number so that it can be graphed.

- Pre Post Sales is the money lost by the manufacturer due to decreased sales before and after the promotion. For display purposes only, this is shown as a positive number so that it can be graphed.

The total height of the bar graph indicates how much money the manufacturer received in sales, *if cannibalization and pre- and post-effects were ignored*.

Lift Decomposition Table - Manufacturer

The Lift Decomposition table displays the same numbers as the preceding graph, but displays all promotion groups that were impacted by the selected promotion. Each promotion group is shown as a row; the blue row indicates the promotion group on which the selected promotion actually ran. This table also summarizes the effects across brands, and across companies, for convenient comparison.

Lift Decomposition Table - Manufacturer

Spring Forward Promo-Albertsons-ANALGESICS

Lift Decomp - Mfg

Albertsons - ANALGESICS - Spring Forward Promo

Company	Brand	Promotion Group	Ttl Evt $	Incr Evt $	Base Evt $	Net Incr Evt $	Canbl $	Pre-Post $	Canbl Vol Mfg	Pre-Post Vol
World Brands	EXEDRA	EXEDRA 100	$61,202	$68,872	$12,330	$68,130	$0	$2,743	0	-638
		EXEDRA 50	$0	$0	$0	($462)	$462	$0	-151	0
		Summary				$65,668	$462	$2,743		
	ADVO	ADVO 50	$0	$0	$0	($4,665)	$4,665	$0	-1,505	0
	Summary					$61,002	$5,127	$2,743		

For the promoted promotion group (Exedra 100), you can see the total event dollars, incremental event dollars, net incremental event dollars and so on, for the selected promotion. Note that for Exedra 100, there was zero dollars of cannibalization and $2743 of pre- and post-promotional effect.

On the other hand, examine the other promotion groups and notice that they were all cannibalized. Of course, for these promotion groups, there was zero direct lift, by definition, as the promotion did not run on them.

Here you can see these useful summaries:

- Total for promotion group where the promotion was run.

- Total effect on the brand.

- Total effect on the manufacturer.

Also notice that this table displays cannibalized and pre- and post-event volume, as well.

Lift Decomposition - Retailer

This table summarizes the cannibalization effects as seen by the retailer; see Examining Promotions from a Retailer's Point of View, page 10-6 for details.

Lift Decomposition - Retailer						
Albertsons - ANALGESICS						
Promotion	Ttl Evt $ Rtl	Base Evt $ Rtl	Incr Evt $ Rtl	Net Incr Evt $ Rtl	Canbl $ Rtl	Pre-Post $ Rtl
Spring Forward Promo	$94,232	$14,308	$79,924	$64,691	$11,476	$3,757

Possible Actions

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

- Edit a promotion, by changing the sale price and other properties. You can also right-click a promotion and select Edit to access other properties.

- Run simulations. See Running a Simulation, page 9-3.

- Run optimization. See Optimizing a Promotion, page 9-4.

- Use the right-click menu to open other worksheets filtered to this promotion. For example, you can open the PMO: Promo Effect - Rtl worksheet to see the retailer's perspective. See Examining Promotions from a Retailer's Point of View, page 10-6.

- View aggregate information for the retailer at the bottom of the screen.

Examining Promotions from a Retailer's Point of View

To evaluate a future promotion from a retailer's point of view

1. You typically start in the Planning Environment; see "Introduction to the Planning Environment.

2. In the Event Planner window, right-click a promotion and click Open With > PMO: Promo Effect - Rtl.

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

The system displays the PMO: Promo Effect - Rtl worksheet, filtered to display just the promotion that you right-clicked.
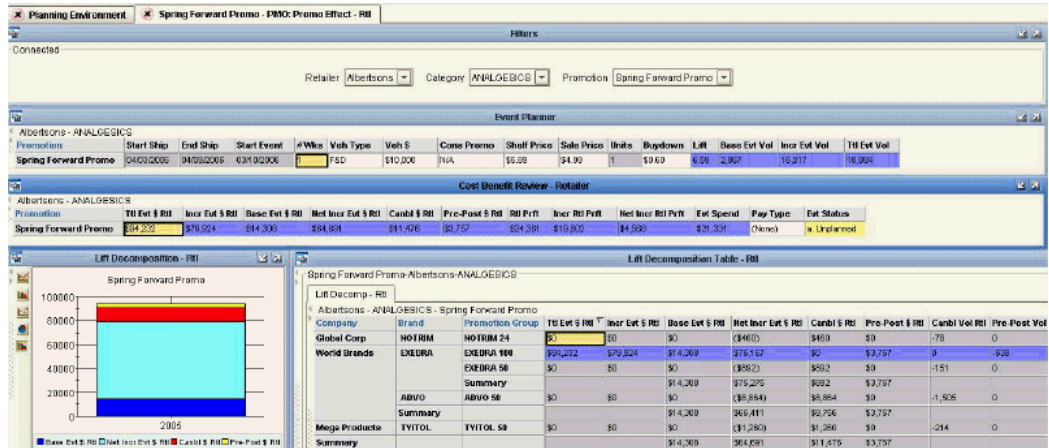
This worksheet includes the same areas as the PMO: Promo Effect - Mfg worksheet, but from the retailer's point of view rather than the manufacturer's.

Lift Decomposition Table - Retailer

The Lift Decomposition table displays all promotion groups that were impacted by the selected promotion, from the point of view of the retailer. Each promotion group is shown as a row; the blue row indicates the promotion group (Exedra 100) on which the selected promotion actually ran.

Lift Decomposition Table - Rtl

Spring Forward Promo-Albertsons-ANALGESICS

Lift Decomp - Rtl

Albertsons - ANALGESICS - Spring Forward Promo

Company	Brand	Promotion Group	Ttl Evt $ Rtl	Incr Evt $ Rtl	Base Evt $ Rtl	Net Incr Evt $ Rtl	Canbl $ Rtl	Pre-Post $ Rtl	Canbl Vol Rtl	Pre-Post Vol
Global Corp	NOTRIM	NOTRIM 24	$0	$0	$0	($460)	$460	$0	-78	0
World Brands	EXEDRA	EXEDRA 100	$94,232	$79,924	$14,308	$76,167	$0	$3,757	0	-838
		EXEDRA 50	$0	$0	$0	($892)	$892	$0	-151	0
		Summary				$14,308	$75,275	$892	$3,757	
	ADVO	ADVO 50	$0	$0	$0	($6,864)	$6,864	$0	-1,505	0
	Summary					$14,308	$66,411	$9,756	$3,757	
Mega Products	TYITOL	TYITOL 50	$0	$0	$0	($1,260)	$1,260	$0	-214	0
Summary						$14,308	$64,591	$11,476	$3,757	

Notice two promotion groups are listed here that were not seen in the manufacturer version: Notrim 24 and Tyitol 50. These promotion groups represent products that this retailer sells, but that are made by a different manufacturer. To the retailer, it is undesirable to cannibalize these promotion groups.

Here you can see these useful summaries:

- Total for promotion group where the promotion was run.

- Total effect on the brand.

- Total effect on each manufacturer.

Also notice that this table displays cannibalized and pre- and post-event volume, as well.

Possible Actions

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

- Edit a promotion, by changing the sale price and other properties. You can also right-click a promotion and select Edit to access other properties.

- Run simulations. See "Running a Simulation."

- Run optimization. See "Optmizing a Promotion."

- Use the right-click menu to open other worksheets filtered to this promotion. For example, you can open the PMO: Promo Effect - Mfg worksheet to see the manufacturer's perspective. See "Examining Promotions from the Manufacturer's Point of View." .

Comparing Promotions in a Scenario

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

When you identify the best promotion, you can mark it as planned; see Marking a Promotion as Planned, page 7-8.

To compare promotions

1. You typically start in the Planning Environment; see "Introduction to the Planning Environment."

2. In the Event Planner window, right-click a scenario and click Open.

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

This launches the PMO: Promotion Comparison worksheet filtered to show the promotions of that scenario.
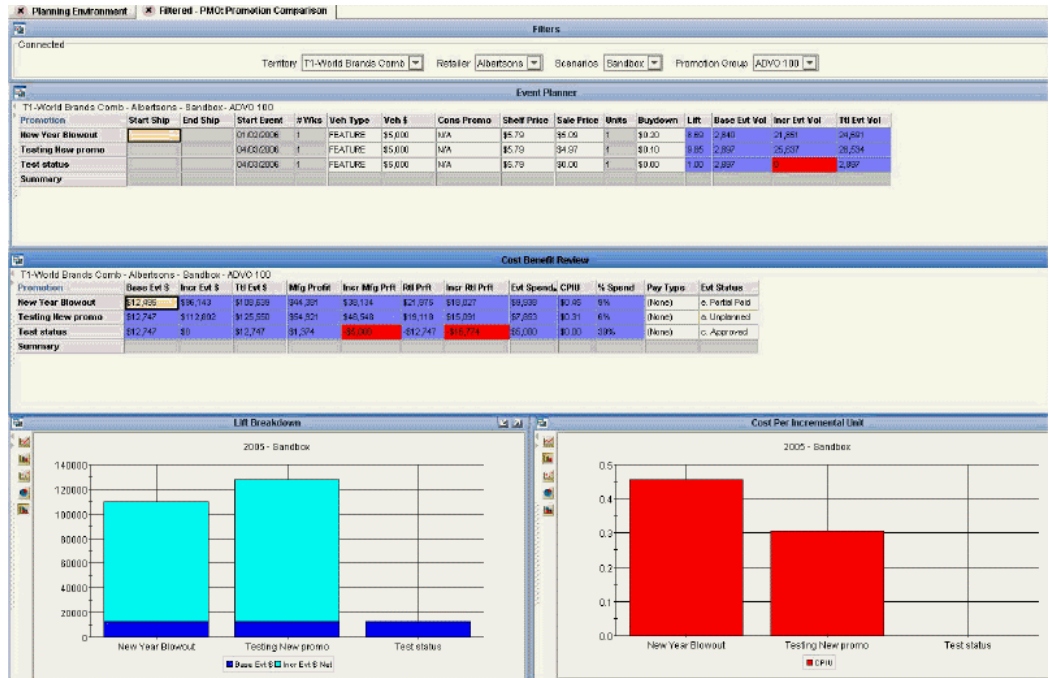
Now you can easily compare all events in the selected scenario. The screen now displays the following areas.

Event Planner

This window is the same as the Event Planner window in the Planning Environment worksheet. It displays details of all events, including start and end ship dates, vehicle type, vehicle cost, buydown, base volume and incremental volume. Incremental volume is generated by Oracle's comprehensive Analytical Engine.

Cost Benefit Review

This window is the same as the Cost Benefit Review window in the Planning Environment worksheet. It displays a detailed cost benefit analysis, including profitability metrics from both the manufacturer and retailer's perspective, overall event spend, cost per incremental unit (CPIU), payment type and price analysis (average retail vs. list).

Graphs

This worksheet displays the following graphs:

• Lift Breakdown: each event is shown as a separate bar.

• Cost Per Incremental Unit: each event is shown as a separate bar.

Possible Actions

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

- Edit a promotion, by changing the sale price and other properties. You can also right-click a promotion and select Edit to access other properties.

- Create new promotions; see Creating a Promotion, page 7-6.

- Delete a promotion; see Deleting a Promotion, page 7-16.

- Make a copy of a promotion; see Copying and Pasting a Promotion, page 7-15.

- Run simulations. See Running a Simulation, page 9-3.

- Run optimization. See Optimizing a Promotion, page 9-4.

- Right-click a promotion and open another worksheet filtered to that promotion. For example, you can open the PMO: Promo Effect - Rtl worksheet to see cannibalization from the retailer's perspective. See Examining Promotions from a Retailer's Point of View, page 10-6.

- Change the status of a promotion, as described in PMO: Planning Promotions - Introduction to the Planning Environment, page 7-1.

Reference

PMO: Promo Effect - Mfg

Basics

Accessing this worksheet	Right-click a promotion and click Open With > PMO: Promo Effect - Mfg.
Levels you can select	Retailer, Category, Promotion
Levels used in cross tabulation	Promotion
Time aggregation	Yearly

Business Data

View	Series	Description
Event Planner	Start Ship	Date when product will start to ship
	End Ship	Date when shipments will end for the event
	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion
	Veh $	Vehicle cost for the promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer
	Sale Price	Sale price per unit at shelf
	Units	Number of units in the deal to the consumer. Usually equal to 1. Use 2 for 2-for-1 sales, for example.
	Buydown	Buydown allowance per unit, discount offered to retailer for running the event
	Lift	Lift factor for the promotion
	Base Evt Vol	Base volume during the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt Vol	Total volume for the promotion

View	Series	Description
Cost Benefit Review	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Base Evt $	Base sales for the manufacturer, during the promotion
	Net Incr Evt $	Net revenue to the manufacturer, after considering cannibalization and pre- and post-effects
	Canbl $	Cannibalization dollars for the manufacturer
	Pre Post $	Total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)
	Mfg Profit	Manufacturer's profit from the event
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion
	Net Incr Mfg Prft	Net incremental profit for the manufacturer, after considering cannibalization and pre- and post-effects
	Rtl Prft	Retailer's profit from the event
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
	Evt Spend	Total planned spending for promotion, sum of buydown, vehicle costs, and slotting

View	Series	Description
	CPIU	Event cost per incremental unit sold as a result of the promotion.
	% Spend	Event spending, as a percentage of event sales
Cost Benefit Review	Pay Type	Indicates the payment terms between the manufacturer and the retailer for this promotion
	Evt Status	Current status of the promotion
Lift Decomposition - Mfg	Base Evt $	Base sales for the manufacturer, during the promotion
	Net Incr Evt $	Net revenue to the manufacturer, after considering cannibalization and pre- and post-effects
	Canbl $	Cannibalization dollars for the manufacturer
	Pre Post $	Total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)
Lift Decomposition Table - Manufacturer	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Base Evt $	Base sales for the manufacturer, during the promotion
	Net Incr Evt $	Net revenue to the manufacturer, after considering cannibalization and pre- and post-effects
	Canbl $	Cannibalization dollars for the manufacturer

View	Series	Description
	Pre Post $	Total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)
	Canbl Vol Mfg	
	Pre Post Vol	Total volume before and after the promotion, as a result of the promotion
Lift Decomposition - Retailer	Ttl Evt $ Rtl	Total sales during the promotion, for the retailer
	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Incr Evt $ Rtl	Incremental sales to the retailer due to the event
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre Post Value Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)

PMO: Promo Effect - Rtl

Basics

Accessing this worksheet	Right-click a promotion and click Open With > PMO: Promo Effect - Rtl.
Levels you can select	Retailer, Category, Promotion
Levels used in cross tabulation	Promotion

Time aggregation	Yearly

Business Data

View	Series	Description
Event Planner	Start Ship	Date when product will start to ship
	End Ship	Date when shipments will end for the event
	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion
	Veh $	Vehicle cost for the promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer
	Sale Price	Sale price per unit at shelf
	Units	Number of units in the deal to the consumer. Usually equal to 1. Use 2 for 2-for-1 sales, for example.
	Buydown	Buydown allowance per unit, discount offered to retailer for running the event
	Lift	Lift factor for the promotion
	Base Evt Vol	Base volume during the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt Vol	Total volume for the promotion

View	Series	Description
Cost Benefit Review - Retailer	Ttl Evt $ Rtl	Total sales during the promotion, for the retailer
	Incr Evt $ Rtl	Incremental sales to the retailer due to the event
	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre-Post $ Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
	Rtl Prft	Retailer's profit from the event
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
	Evt Spend	Total planned spending for promotion, sum of buydown, vehicle costs, and slotting
	Pay Type	Indicates the payment terms between the manufacturer and the retailer for this promotion
	Evt Status	Current status of the promotion
Lift Decomposition - Rtl	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects

View	Series	Description
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre Post Value Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
Lift Decomposition Table - Retailer	Ttl Evt $ Rtl	Total sales during the promotion, for the retailer
	Incr Evt $ Rtl	Incremental sales to the retailer due to the event
	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre-Post $ Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
	Canbl Vol Rtl	
	Pre Post Vol	Total volume before and after the promotion, as a result of the promotion

PMO: Promotion Comparison

Basics

Accessing this worksheet	Right-click a scenario and click Open.

Levels you can select	Territory, Retailer, Promotion Group	
Levels used in cross tabulation	Scenario, Promotion	
Time aggregation	Yearly	

Business Data

View	Series	Description
Event Planner	Start Ship	Date when product will start to ship
	End Ship	Date when shipments will end for the event
	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion
	Veh $	Vehicle cost for the promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Shelf Price	Everyday price to the consumer
	Sale Price	Sale price per unit at shelf
	Units	Number of units in the deal to the consumer. Usually equal to 1. Use 2 for 2-for-1 sales, for example.
	Buydown	Buydown allowance per unit, discount offered to retailer for running the event
	Lift	Lift factor for the promotion

View	Series	Description
	Base Evt Vol	Base volume during the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt Vol	Total volume for the promotion
Cost Benefit Review	Base Evt $	Base sales for the manufacturer, during the promotion
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Mfg Profit	Manufacturer's profit from the event
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion
	Rtl Prft	Retailer's profit from the event
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Evt Spend exS	Total planned buydown and vehicle costs for promotion
	CPIU	Event cost per incremental unit sold as a result of the promotion.
	% Spend	Event spending, as a percentage of event sales
	Pay Type	Indicates the payment terms between the manufacturer and the retailer for this promotion
	Evt Status	Current status of the promotion

View	Series	Description
Lift Breakdown	Base Evt $	Base sales for the manufacturer, during the promotion
	Incr Evt $ Net	
Cost Per Incremental Unit	CPIU	Event cost per incremental unit sold as a result of the promotion.

11

PMO: Reviewing Past Performance

This chapter covers the following topics:

- Overview
- Evaluating Performance from the Manufacturer's Point of View
- Evaluating Performance from a Retailer's Point of View
- Viewing Actual Averages
- Reference

Overview

This chapter describes how to review past performance of your promotions. It includes the following sections:

To review the performance of past promotions, you generally start in the Planning Environment, page 7-1 worksheet. From there, you right-click a promotion and launch any of the relevant PMO worksheets to see data for that promotion.
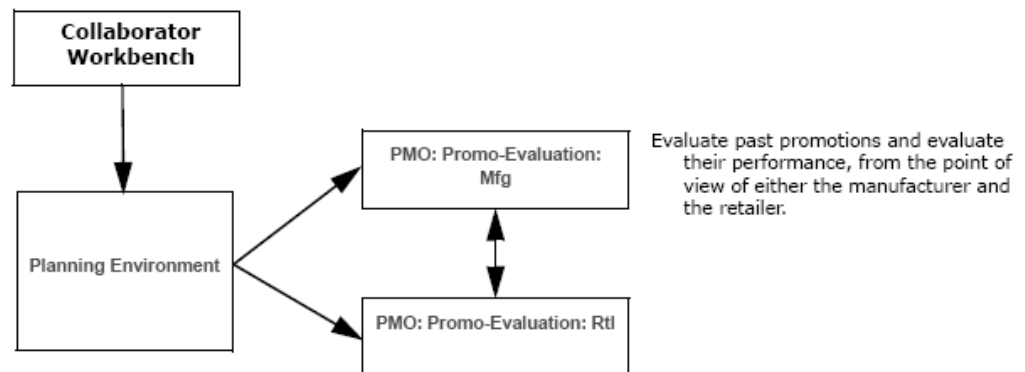
Once a promotion has been planned and executed, it is useful to evaluate its performance against your original plan. The PMO: Promo-Evaluation: Mfg, page 11-9

and PMO: Promo-Evaluation: Rtl, page 11-9 worksheets provide a detailed post-promotional analysis of each individual promotion (that is, compare forecast to actual performance).

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

• Cannibalization

• Pre and post effects, such as pantry loading

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

Evaluating Performance from the Manufacturer's Point of View

To evaluate a past promotion from the manufacturer's point of view

1. You typically start in the Planning Environment; see Introduction to the Planning Environment, page 7-1.

2. In the Event Planner window, right-click a promotion and click Open With > PMO: Promo-Evaluation: Mfg.
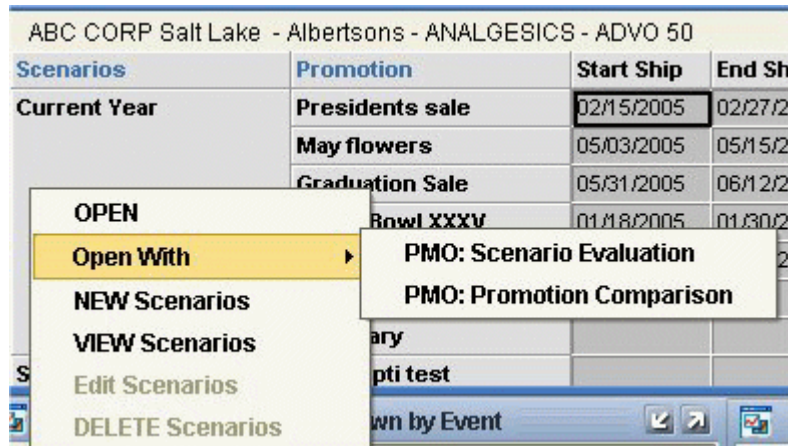
3. If the worksheet does not show data immediately, click Data > Rerun. Or click the Run button.

The system displays the PMO: Promo-Evaluation: Mfg worksheet, filtered to display just the promotion that you right-clicked.
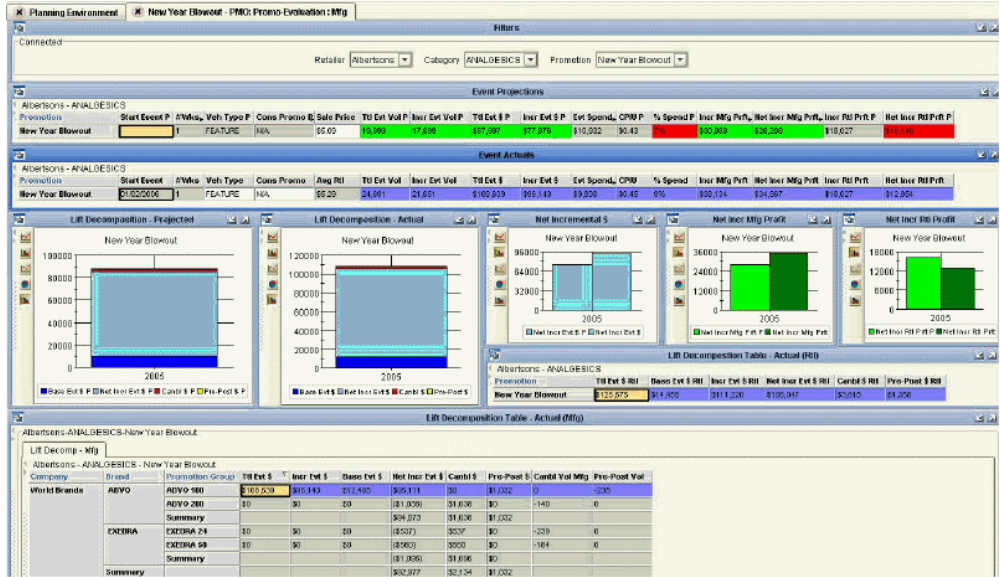
The PMO: Promo-Evaluation: Mfg worksheet includes the following windows.

Event Projections and Event Actuals

These windows compare the projections and the actuals, one directly above the other. Notice that the actuals are displayed mostly in blue.
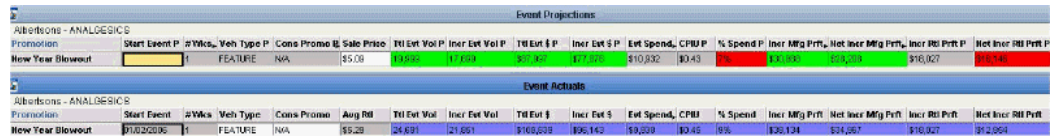
The Event Projections window displays planned event details, including event start, vehicle type, total planned volume, anticipated manufacturer profit and anticipated spend. For the series in this window, PTP uses colors to indicate deviations between the projections and the actuals:

• If the actual value is more than 20% different from the projection in the undesirable sense, the projection is shown in red.

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

The Event Actuals window shows the corresponding actuals.

Lift Decomposition Graphs

This worksheet also displays lift decomposition graphs showing the projected

breakdown and the actual breakdown.
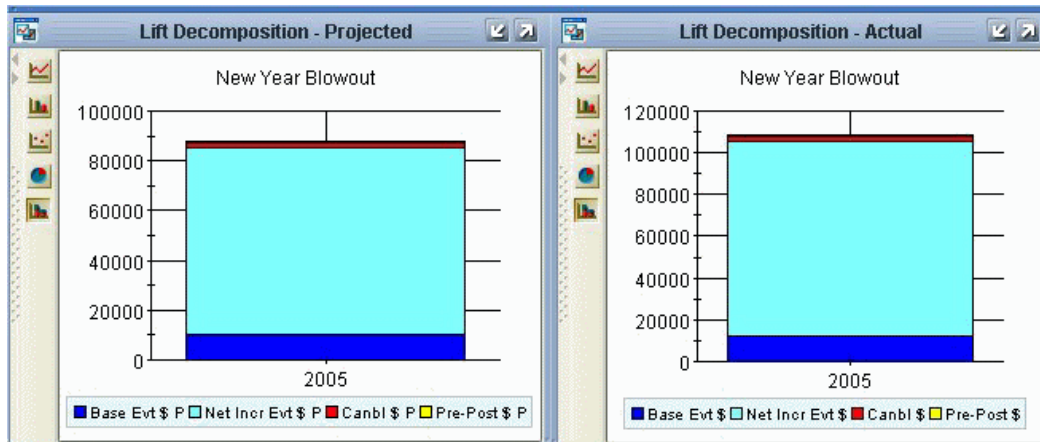
Net Incremental Graphs

The worksheet includes the following graphs to show the net incremental dollars earned for this promotion; each graph compares the projection to the actual. The first graph shows the net incremental dollars. The second and third graphs show the net incremental profit to the manufacturer and retailer, respectively. The net incremental profit is the net additional profit that is earned because of the promotion, in addition to the baseline profit.
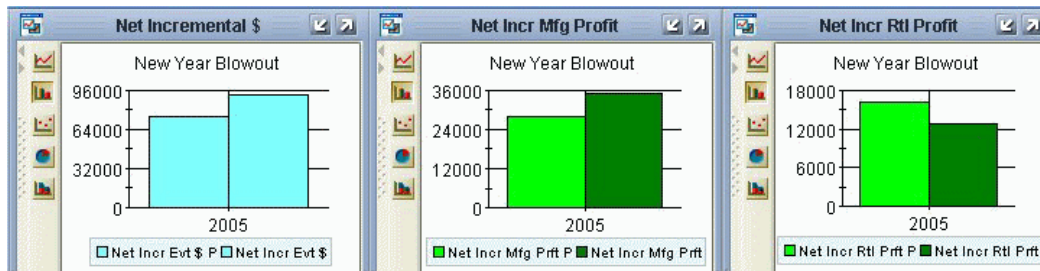
Lift Decomposition Table Actual (Manufacturer)

The lift decomposition table shows the specific breakdown into base, incremental, cannibalization, and pre- and post-effect dollars. This table also shows the net incremental volume for the event. This table applies to the manufacturer's point of view.

Lift Decomposition Table - Actual (Mfg)

Company	Brand	Promotion Group	Ttl Evt $	Incr Evt $	Base Evt $	Net Incr Evt $	Canbl $	Pre-Post $	Canbl Vol Mfg	Pre-Post Vol
World Brands	ADVO	ADVO 100	$108,639	$96,143	$12,495	$95,111	$0	$1,032	0	-235
		ADVO 200	$0	$0	$0	($1,038)	$1,038	$0	-140	0
		Summary				$94,073	$1,038	$1,032		
	EXEDRA	EXEDRA 24	$0	$0	$0	($537)	$537	$0	-239	0
		EXEDRA 50	$0	$0	$0	($560)	$560	$0	-184	0
		Summary				($1,096)	$1,096	$0		
	Summary					$92,977	$2,134	$1,032		

Possible Actions

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

Right-click a promotion and open another worksheet filtered to that promotion. For example, you can open the PMO: Promo-Evaluation: Rtl worksheet to see past performance from the retailer's perspective. See Evaluating Performance from a Retailer's Point of View, page 11-5.

Evaluating Performance from a Retailer's Point of View

To evaluate a past promotion from a retailer's point of view

1. You typically start in the Planning Environment; see Introduction to the Planning Environment, page 7-1.

2. In the Event Planner window, right-click a promotion and click Open With > PMO: Promo-Evaluation: Rtl

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

The system displays the PMO: Promo-Evaluation: Rtl worksheet, filtered to display just the promotion that you right-clicked.
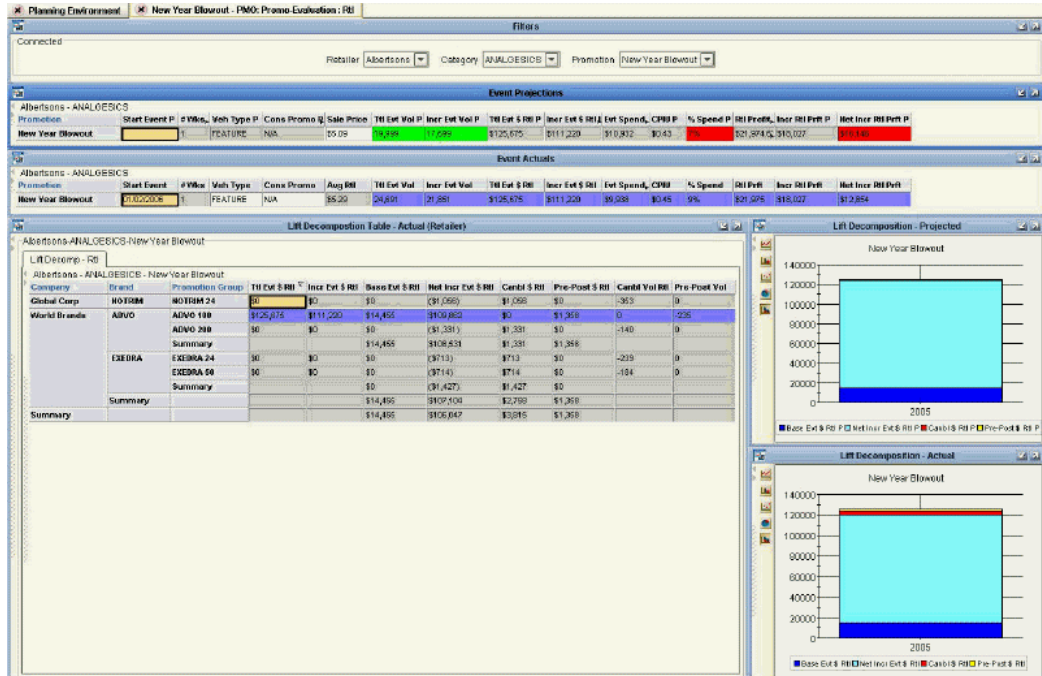
This worksheet contains some of the same areas as the PMO: Promo-Evaluation: Mfg worksheet, but from the retailer's point of view rather than the manufacturer's.

Event Projections and Event Actuals

These windows compare the projections and the actuals, one directly above the other. Notice that the actuals are displayed mostly in blue.

The Event Projections window displays planned event details, including event start, vehicle type, total planned volume, anticipated retailer profit and anticipated spend. For the series in this window, PTP uses colors to indicate deviations between the projections and the actuals:

- If the actual value is more than 20% different from the projection in the undesirable sense, the projection is shown in red.

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

The Event Actuals window shows the corresponding actuals.

Lift Decomposition Table - Actual (Retailer)

The lift decomposition table shows the specific breakdown into base, incremental, cannibalization, and pre- and post-effect dollars. This table also shows the net incremental volume for the event. This table applies to the retailer's point of view.

| | | Lift Decompostion Table - Actual (Retailer) | | | | | | | | | |

Albertsons-ANALGESICS-New Year Blowout

Lift Decomp - Rtl

Albertsons - ANALGESICS - New Year Blowout

Company	Brand	Promotion Group	Ttl Evt $ Rtl	Incr Evt $ Rtl	Base Evt $ Rtl	Net Incr Evt $ Rtl	Canbl $ Rtl	Pre-Post $ Rtl	Canbl Vol Rtl	Pre-Post Vol
Global Corp	NOTRIM	NOTRIM 24	$0	$0	$0	($1,056)	$1,056	$0	-353	0
World Brands	ADVO	ADVO 100	$125,675	$111,220	$14,455	$109,862	$0	$1,358	0	-235
		ADVO 200	$0	$0	$0	($1,331)	$1,331	$0	-140	0
		Summary			$14,455	$108,531	$1,331	$1,358		
	EXEDRA	EXEDRA 24	$0	$0	$0	($713)	$713	$0	-239	0
		EXEDRA 50	$0	$0	$0	($714)	$714	$0	-184	0
		Summary			$0	($1,427)	$1,427	$0		
	Summary				$14,455	$107,104	$2,758	$1,358		
Summary					$14,455	$106,047	$3,815	$1,358		

Here you can see these useful summaries:

• Total for promotion group where the promotion was run.

• Total effect on the brand.

• Total effect on each manufacturer.

Also notice that this table displays cannibalized and pre- and post-event volume, as well.

Lift Decomposition Graphs

The worksheet includes two graphs to show the projected lift decomposition and the actual lift decomposition. These are displayed vertically in the worksheet for space reasons. For convenience here, the documentation displays them side by side.
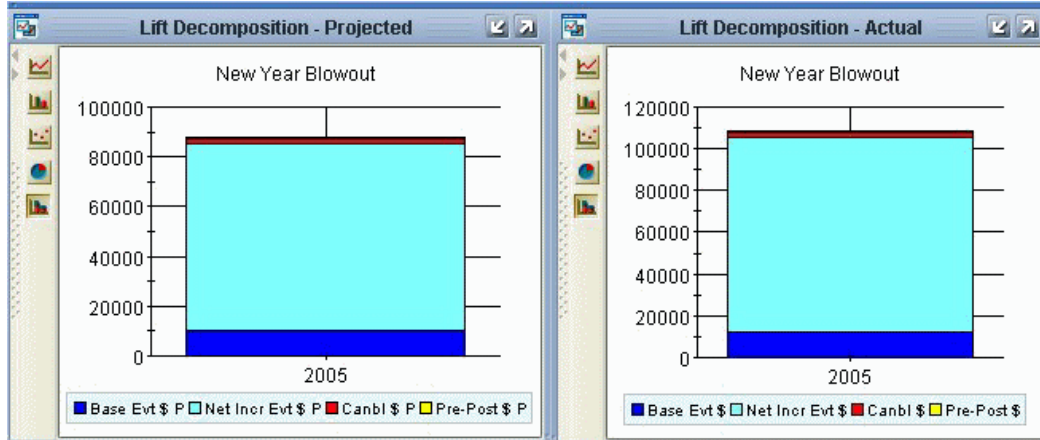
Possible Actions

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

Right-click a promotion and open another worksheet filtered to that promotion. For example, you can open the PMO: Promo-Evaluation: Mfg worksheet to see past performance from the manufacturer's perspective. See Evaluating Performance from the Manufacturer's Point of View, page 11-2.

Viewing Actual Averages

It is often useful to review actuals and see average information for different kinds of promotions.

> **Note:** Some of this data is highly aggregated, so some tabs may come up slowly.

To view average history

In My Worksheets (in Collaborator Workbench), click PMO: Promotion History.

The worksheet is displayed as follows:

Unlike other worksheets, this worksheet is designed as a series of tabs, each of which

displays the same averages, for different contexts. For example, on this tab, you select a retailer and category. The table shows averages for that retailer and category. Each row in the table corresponds to a type of promotion, so you see these averages broken out by promotion type.

Each average is computed on a weekly basis. For example, Avg Ttl Evt Vol is the average total event volume for a single week.

Reference

PMO: Promo-Evaluation: Mfg

This worksheet compares projections to actuals for a past promotion, from the point of view of the manufacturer:

Basics

Accessing this worksheet	Right-click a promotion and click Open With > PMO: Promo-Evaluation: Mfg.
Levels you can select	Retailer, Category, Promotion
Levels used in cross tabulation	Promotion
Time aggregation	Yearly

Business Data

View	Series	Description
Event Projections	Start Event P	Projected date when promotion starts in stores
	# Wks P	Projected event length in whole weeks, assuming that each week starts on Monday.
	Veh Type P	Projected vehicle type or event type of the promotion
	Cons Promo P	Projected consumer overlay.

View	Series	Description
	Sale Price	Sale price per unit at shelf
	Ttl Evt Vol P	Projected total volume for the promotion
	Incr Evt Vol P	Projected incremental volume due to the promotion
	Ttl Evt $ P	Projected total sales during the promotion, for the manufacturer
	Incr Evt $ P	Projected incremental sales to the manufacturer due to the event
	Evt Spend exS P	Projected total planned buydown and vehicle costs for promotion
	CPIU P	Projected event cost per incremental unit sold as a result of the promotion.
	% Spend P	Projected event spending, as a percentage of event sales
	Incr Mfg Prft P	Projected incremental profit to the manufacturer due to the promotion
	Net Incr Mfg Prft P	Projected net incremental profit for the manufacturer
	Incr Rtl Prft P	Projected incremental profit to the retailer due to the promotion
Event Projections	Net Incr Rtl Prft P	Projected net incremental profit for the retailer
Event Actuals	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion

View	Series	Description
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Avg Rtl	Average unit retail price at shelf
	Ttl Evt Vol	Total volume for the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Evt Spend exS	Total planned buydown and vehicle costs for promotion
	CPIU	Event cost per incremental unit sold as a result of the promotion.
	% Spend	Event spending, as a percentage of event sales
	Incr Mfg Prft	Incremental profit to the manufacturer due to the promotion
	Net Incr Mfg Prft	Net incremental profit for the manufacturer, after considering cannibalization and pre- and post-effects
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
Lift Decomposition - Projected	Base Evt $ P	Projected base sales for the manufacturer, during the promotion
	Net Incr Evt $ P	Projected net revenue to the manufacturer

View	Series	Description
	Canbl $ P	Projected cannibalization dollars for the manufacturer
	Pre Post Sales Value P	Projected total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)
Lift Decomposition - Actual	Base Evt $	Base sales for the manufacturer, during the promotion
	Net Incr Evt $	Net revenue to the manufacturer, after considering cannibalization and pre- and post-effects
	Canbl $	Cannibalization dollars for the manufacturer
	Pre Post $	Total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)
Net Incremental $	Net Incr Evt $ P	Projected net revenue to the manufacturer
	Net Incr Evt $	Net revenue to the manufacturer, after considering cannibalization and pre- and post-effects
Net Incr Mfg Profit	Net Incr Mfg Prft P	Projected net incremental profit for the manufacturer
	Net Incr Mfg Prft	Net incremental profit for the manufacturer, after considering cannibalization and pre- and post-effects
Net Incr Rtl Profit	Net Incr Rtl Prft P	Projected net incremental profit for the retailer
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
LIft Decompostion Table - Actual	Ttl Evt $ Rtl	Total sales during the promotion, for the retailer

View	Series	Description
(Retailer)	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Incr Evt $ Rtl	Incremental sales to the retailer due to the event
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre-Post $ Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
Lift Decomposition Table - Actual (Mfg)	Ttl Evt $	Total sales during the promotion, for the manufacturer
	Incr Evt $	Incremental sales to the manufacturer due to the event
	Base Evt $	Base sales for the manufacturer, during the promotion
	Net Incr Evt $	Net revenue to the manufacturer, after considering cannibalization and pre- and post-effects
	Canbl $	Cannibalization dollars for the manufacturer
	Pre Post $	Total sales made before and after the promotion, as a result of the promotion (manufacturer's perspective)
	Canbl Vol Mfg	
	Pre Post Vol	Total volume before and after the promotion, as a result of the promotion

PMO: Promo-Evaluation: Rtl

This worksheet compares projections to actuals for a past promotion, from the point of

view of the retailer:

Basics

Accessing this worksheet	Right-click a promotion and click Open With > PMO: Promo-Evaluation: Rtl.
Levels you can select	Retailer, Category, Promotion
Levels used in cross tabulation	Promotion
Time aggregation	Yearly

Business Data

View	Series	Description
Event Projections	Start Event P	Projected date when promotion starts in stores
	# Wks P	Projected event length in whole weeks, assuming that each week starts on Monday.
	Veh Type P	Projected vehicle type or event type of the promotion
	Cons Promo P	Projected consumer overlay.
	Sale Price	Sale price per unit at shelf
	Ttl Evt Vol P	Projected total volume for the promotion
	Incr Evt Vol P	Projected incremental volume due to the promotion
	Ttl Evt $ Rtl P	Projected total sales during the promotion, for the retailer
	Incr Evt $ Rtl P	Projected incremental sales to the retailer due to the event

View	Series	Description
	Evt Spend exS P	Projected total planned buydown and vehicle costs for promotion
	CPIU P	Projected event cost per incremental unit sold as a result of the promotion.
	% Spend P	Projected event spending, as a percentage of event sales
	Rtl Profit P	Projected retailer's profit from the event
	Incr Rtl Prft P	Projected incremental profit to the retailer due to the promotion
	Net Incr Rtl Prft P	Projected net incremental profit for the retailer
Event Actuals	Start Event	Date when promotion starts in stores
	# Wks	Event length in whole weeks, assuming that each week starts on Monday.
	Veh Type	Vehicle type or event type of the promotion
	Cons Promo	Consumer overlay, the deal type as seen by the consumer.
	Avg Rtl	Average unit retail price at shelf
	Ttl Evt Vol	Total volume for the promotion
	Incr Evt Vol	Incremental volume due to the promotion
	Ttl Evt $ Rtl	Total sales during the promotion, for the retailer
	Incr Evt $ Rtl	Incremental sales to the retailer due to the event

View	Series	Description
	Evt Spend exS	Total planned buydown and vehicle costs for promotion
	CPIU	Event cost per incremental unit sold as a result of the promotion.
	% Spend	Event spending, as a percentage of event sales
	Rtl Prft	Retailer's profit from the event
	Incr Rtl Prft	Incremental profit to the retailer due to the promotion
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
Lift Decomposition Table - Actual (Retailer)	Ttl Evt $ Rtl	Total sales during the promotion, for the retailer
	Incr Evt $ Rtl	Incremental sales to the retailer due to the event
	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects
	Net Incr Rtl Prft	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre Post Value Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
	Canbl Vol Rtl	

View	Series	Description
	Pre Post Vol	Total volume before and after the promotion, as a result of the promotion
Lift Decomposition - Projected	Base Evt $ Rtl P	Projected base sales for the retailer, during the promotion
	Net Incr Evt $ Rtl P	Projected net revenue to the retailer
	Canbl $ Rtl P	Projected cannibalization dollars for the retailer
	Pre Post Value Rtl P	Projected total sales made before and after the promotion, as a result of the promotion (retailer's perspective)
Lift Decomposition - Actual	Base Evt $ Rtl	Base sales for the retailer, during the promotion
	Net Incr Evt $ Rtl	Net revenue to the retailer, after considering cannibalization and pre- and post-effects
	Canbl $ Rtl	Cannibalization dollars for the retailer
	Pre Post Value Rtl	Total sales made before and after the promotion, as a result of the promotion (retailer's perspective)

PMO: Promotion History

This worksheet displays the past averages for each promotion type, in a number of different contexts.

Basics

Accessing this worksheet	In My Worksheets (in Collaborator Workbench), click PMO: Promotion History.
	If a worksheet is currently open, click File > Open. Click PMO: Promotion History and then click Open.

Levels you can select	Different for each tab of this worksheet.
Levels used in cross tabulation	Promotion Type
Time aggregation	Yearly

Business Data

Each view in this worksheet contains the same set of series:

Series	Description
Avg Rtl	Average unit retail price at shelf
Avg % Disc	Average percent discount
Avg B Dwn	Average buydown for the event
Avg Ttl Evt Vol	Average weekly total event volume
Avg Incr Evt Vol	Average weekly incremental event volume
Avg Lift	Average lift factor for promotion
Avg Ttl Evt $	Average weekly total event dollars for manufacturer
Avg Incr Evt $	Average weekly incremental event dollars for manufacturer
Avg Mfg Prft	Average weekly manufacturer profit
Avg Incr Mfg Prft	Average weekly incremental manufacturer profit
Avg Rtl Prft	Average weekly retailer profit
Avg Inc Rtl Prft	Average weekly incremental retailer profit
Avg Rtl Margin	Average retailer event margin
Avg Evt Spend	Average weekly event spend
Avg CPIU	Average cost per incremental unit

Series	Description
Avg % Spend	Average percent spend

Part 3

Advanced Topics

12

Creating Worksheets and Content Panes

This chapter covers the following topics:

- Introduction

- Working with Lists

- Creating or Editing a Worksheet or Content Pane

- Configuring the Basics

- Selecting Series on a Worksheet

- Managing the Series Lists

- Specifying the Time Resolution and Time Span

- Specifying Aggregation Levels

- Using the Advanced Selection Options

- Changing the Overall Scale or Unit of Measure

- Filtering the Worksheet or Content Pane

- Managing the List of Members

- Applying Exception Filters

- Defining the View Layout

- Adding and Managing Worksheet Views

- Specifying the Worksheet Elements in a View

- Displaying an Embedded Worksheet

- Filtering a Worksheet View

- Sharing Worksheet and Content Panes

- Deleting Worksheet or Content Panes

- General Tips on Worksheet Design

Introduction

This chapter describes how to create and redefine worksheets and content panes.

To create or redefine worksheets and content panes, you use the worksheet editor, which is divided into multiple screens. This section provides a quick overview:

Area	Purpose	For details, see
Display	Specify basic information.	Configuring the Basics, page 12-4
Series	Select series to include.	Selecting Series on a Worksheet, page 12-6
Time	Specify time resolution of worksheet or content pane and span of time to consider.	Specifying the Time Resolution and Time Span, page 12-9
Aggregation Levels	Optionally specify aggregation levels to include.	Specifying Aggregation Levels, page 12-11
Filters	Optionally filter the selected combinations.	Filtering a Worksheet View, page 12-26
Exceptions	Optionally apply exception filters to further filter the combinations.	Applying Exception Filters, page 12-18
Layout Designer	Applicable only to worksheets. Define the layout of the worksheet and its views, including the layout of the worksheet tables, the location of each included series, and the graph format.	Defining the View Layout, page 12-20

Within the editor, you have the following options:

- To move to another page, either click a button on the left side of the page or click Previous or Next.

- To exit the worksheet editor and keep your changes, click OK.

- To exit the worksheet editor and discard all changes, click Cancel.

Working with Lists

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

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

- To move all elements from one list to the other, click one of the double arrow buttons, as appropriate.

- To move a single element from one list to the other, click the element and then click one of the single arrow buttons, as appropriate. Or double-click the element.

- To move several adjacent elements, click the first element, press Shift and click the last element. Then click one of the single arrow buttons, as appropriate.

- To move several elements that are not adjacent, press Ctrl and click each element you want. Then click one of the single arrow buttons, as appropriate.

Creating or Editing a Worksheet or Content Pane

To create a new worksheet or content pane

Click File > New. Or click the New button.

To edit an existing worksheet or content pane

1. Click File > Open. Or click the Open button.

2. Click a worksheet or content pane and click Open.

3. Click the Worksheet menu and select one of the menu items. Or click one of the worksheet buttons on the tool bar.

4. Save your changes to the worksheet definition: To save the new definition, click the Save button. Or click File > Save

> **Note:** In contrast, the Data > Update option saves the data and notes in the worksheet, not the worksheet definition.
>
> To save the worksheet with a new name, click the Save As button.

Configuring the Basics

To configure basic information for a worksheet or content pane:

1. Click Worksheet > Display. Or click the Display button.

   The system displays a page where you specify the following basic information

Name	The title to use in the My Worksheets module and in the window title.
Description	Provides optional information to display in My Worksheets. This is especially useful in public worksheets for explaining the purpose of the worksheet to other users.
Access	Select Private or Public. Private is for your use only. Public worksheets and content panes are available to all users in the group.

Enable Extra Filters	This option adds an extra, user-controlled filter to the worksheet. If you select the Enable Extra Filters check box, that means that when you open the worksheet, you can prefilter the data before seeing the worksheet results; this is especially useful for users who use Demantra Anywhere.
	Normally when you specify aggregation levels to include in the worksheet, as described in "Specifying Aggregation Levels", all members of those levels are available in the worksheet.
	If you select the Enable Extra Filters check box, that means that when you run the worksheet, Demantra first prompts you to select the members to display for each level.
	This option has no effect on content panes.
Cache Worksheet Data	Specifies whether Demantra should cache the data for this worksheet, for each user who works with it. If you cache a worksheet, it will run more quickly in general, but the cache will need to be refreshed periodically. Choose one of the following refresh options:
	• Manual—users will have to manually refresh the cache.
	• Automatic—Demantra will automatically refresh the cache, as specified by your implementors.
	In either case, Demantra automatically detects when a cache is out of date and behaves appropriately. Demantra also automatically refreshes the cache when you make certain structural changes to the worksheet.
Open With Context	Specifies how this worksheet should be filtered when a user opens it via the Open or Open With menu options (on the right-click menu).
	Choose one of the following options:
	• Selected Member (this will filter the worksheet to the object from which it was launched, aggregating across all combinations associated with that object)
	• Selected Combination (this will filter the worksheet to the combination from which it was launched)

2. To display the content of this worksheet as a content pane in Collaborator Workbench, check Content and then complete the following fields:

Display Format	Specifies the display format to use. Not all display formats may be possible, depending on the number of levels and series you include.
	Currently, Collaborator Workbench chooses the color to use for each series, when displaying series in the graph-type content panes.
Location	Select Wide Pane or Narrow Pane to determine where the content pane will be displayed in Collaborator Workbench.
Top/Bottom Filter	(Only for bar chart content panes.) Specifies how to filter the members or combinations for display in the bar chart (to save space, not all members are shown).
	• Use the dropdown menu to specify whether the filter should apply to the top-ranked or to bottom-ranked members.
	• In the input field, specify the number of members to be included.
	• For Criteria Series, select the series that Demantra should use to rank the members. (This does not control the order in which they are displayed in the chart.)
	Note: If multiple items have identical values, all of them are displayed, and they collectively count as 1 towards the total. For example, suppose top values were 200, 150, 150, 100, and 50. If you specified Top/Bottom filter as three, you would see a total of four items: both the 150 items, in addition to the 200 and 100 items.
	This option does not affect the worksheet.

3. For worksheets only, to specify how the table should appear, see Defining the View Layout, page 12-20.

Selecting Series on a Worksheet

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

> **Note:** If you use a settlement level in a worksheet or content pane, all series in the worksheet or content pane must refer to tables used by the settlement hierarchy.

To specify the series on a worksheet or content pane:

1. Click Worksheet > Series. Or click the Series button.

   The system displays the Available Series and Selected Series lists. Each list is a collapsible list of series groups and the series in them.
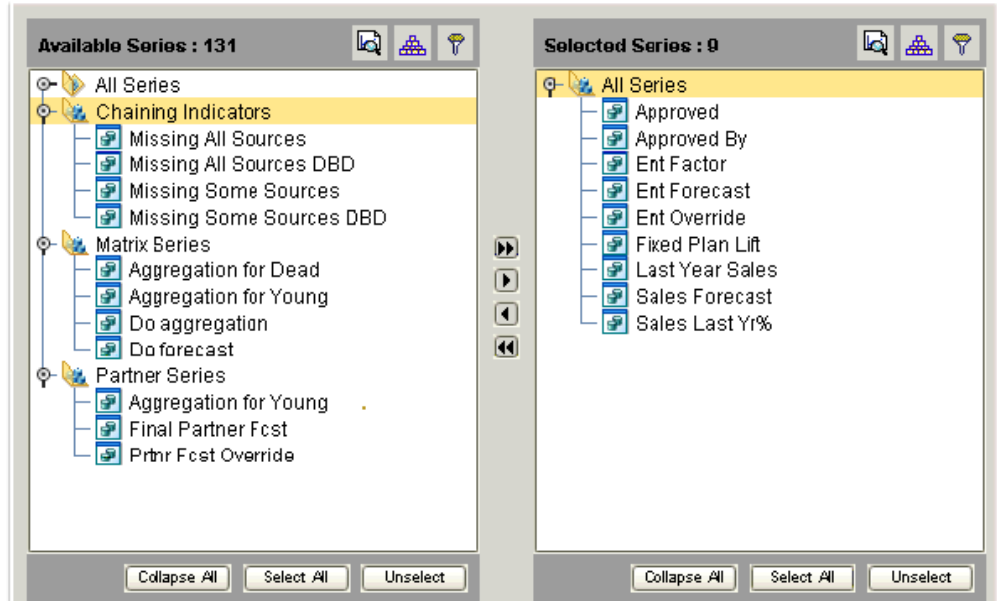
2. Move all series that you want into the Selected Series list. To do so, either double-click each series or drag and drop it. You can also move an entire series group from one list to the other in the same way.

3. Remove any series from the Selected Series list that you do not want to include.

   > **Note:** You cannot remove a series if it is used as the Criteria Series for bar chart content.

   To change the order in which the series are displayed, see Defining the View Layout, page 12-20.

   See Managing the Series Lists, page 12-7.

Managing the Series Lists

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

> **Note:** This section applies only to the series page of the worksheet editor (Worksheet > Series).

To sort a list of series:

1. Click the Sort button.

   The Sort dialog box is displayed.

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

3. Click OK.

To filter a list of series:

1. Click the Filter button.

   The Filter page appears.

2. Click Add.

3. Click the arrow to the right of the operator box and select an operator from the dropdown list.

4. In the number box, enter the value by which to filter the list.

5. (Optional) You can filter further by using the AND relationship.

6. Click OK.

To find a series:

1. Click the Find button.

   The Find dialog box appears.

2. In the Find where box, select the name of the list to search.

3. In the Find what box, type name of the series.

4. Select Up, Down or All to determine the direction of the search.

5. (Optional) Select one or more of the check boxes:

   • Whole Word: Search for the exact match of a word.

   • Match Case: Search for the exact match of a word (case sensitive).

6. Click Find Next to begin (or continue) searching.

Specifying the Time Resolution and Time Span

Each worksheet or content pane selects data for a specified span of time and optionally aggregates it in time. You use the Time dialog box to specify the time resolution and span of time of the results.

To specify time criteria:

1. Click Worksheet > Time. Or click the Time button.

2. In the Time Scale box, specify the time resolution. The data in the worksheet or content pane is aggregated to this time resolution. That is, this option specifies the period of time that each data point in the line graph represents.

3. In the Time Filter box, specify the time period to which the worksheet or content pane applies:

   • Fixed if you always want to show a specific time range, regardless of the current date.

   • Relative to Today if you always want to show a time range relative to today.

   • Relative to Last Sales Date if you always want to show a time range relative to the last sales date in the loaded data.

4. In the From Date and To Date boxes, enter values depending on the time filter you

have chosen, as follows:

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

5. To control how dates are displayed, click the Advanced button, which brings up the following dialog box:
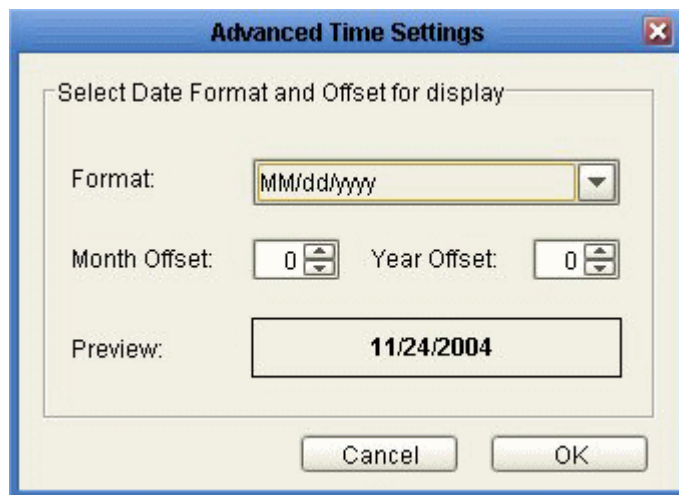
6. In the Format dropdown list, select a display format.

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

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

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

8. Click OK.

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

Specifying Aggregation Levels

A worksheet or content pane usually includes aggregation levels. When you use the worksheet or content pane, you can examine data for the item-location combinations associated with those levels.

- If you do not specify any aggregation levels, the data is completely aggregated across all items and locations.

- If you use a settlement level, you cannot use levels from any other hierarchy.

To specify the aggregation levels in a worksheet or content pane:

1. Click Worksheet > Aggregation Levels. Or click the Levels button.

   The system displays the Available Levels and Selected Levels lists.

2. Move all aggregation levels that you want into the Selected Levels list, using any of the techniques in "Working with Lists".

3. Remove any unwanted levels from the Selected Levels list.

For a worksheet, the selected levels will now be used on all views of this worksheet, unless you configure the views otherwise. The layout of the worksheet view controls the order in which the levels are used; see Defining the View Layout, page 12-20.

See also

- Using the Advanced Selection Options, page 12-12

- Changing the Overall Scale or Unit of Measure, page 12-14

Using the Advanced Selection Options

By default, if a worksheet or content pane includes a promotion level, the worksheet or content pane includes all the following types of combinations:

- Combinations that have both sales data and promotions

- Combinations that have sales data, but no promotions

- Combinations that have promotions, but no sales data

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

For a worksheet, if you move the promotion level to the worksheet axis (see Defining the View Layout, page 12-20), the table will display a similar placeholder.

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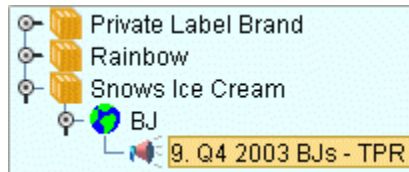
To exclude combinations with partial data:

1. Click Worksheet > Aggregation Levels. Or click the Levels button.

2. Include at least two levels, one of which should be a promotional level.

   When you do so, the screen displays an Advanced button in the lower right.
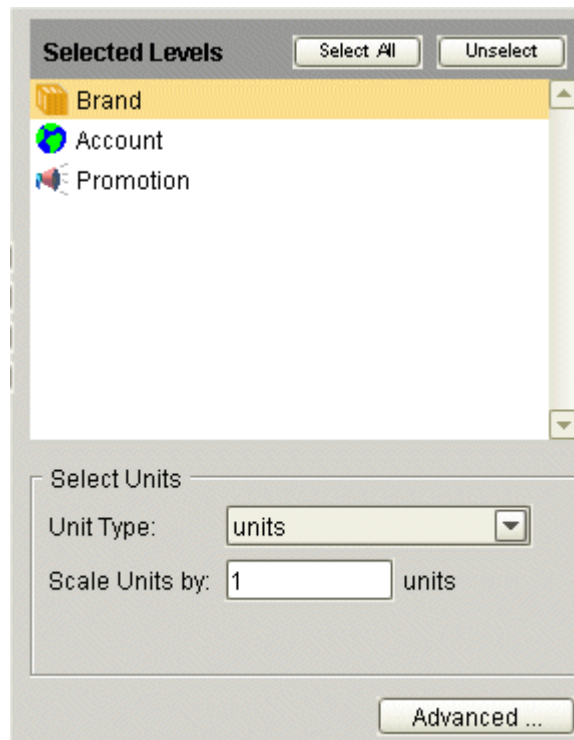
3. Click Advanced.

   Oracle displays a dialog box with additional options.
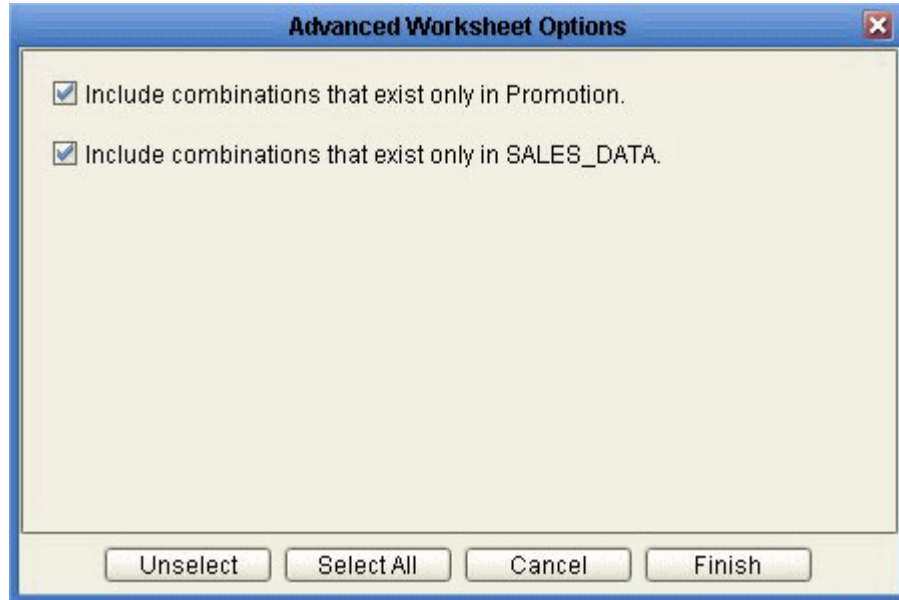
Include combinations that exist only in Promotion	This option selects combinations that have associated promotions, even if they do not have sales data.
Include combinations that exist only in SALES_DATA	This option selects combinations that have sales data, even if they do not have any associated promotions.

4. To exclude the combinations you do not want to see, click the check boxes as needed.

See Specifying Aggregation Levels, page 12-11.

Changing the Overall Scale or Unit of Measure

In addition to levels, series, and filtering, a worksheet or content pane has the following characteristics:

- A single unit of measure. Typically, most series refer to this unit of measure, but there are exceptions such as percentage values. You can switch the unit of measure, and the displayed values are changed accordingly. The units in your system depend upon your implementation but probably include unit count and dollars.

  For monetary units, you can also switch to a different index (such as the Consumer Price Index or CPI) or exchange rate, and the worksheet or content pane automatically multiplies all values accordingly.

- An overall scale. The default value is 1. If the displayed values are all large, it can be useful to re-scale the numbers, for example, to display in amounts of 1000 or 1000000.

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

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

To change the overall scaling factor:

1. Click Worksheet > Aggregation Levels. Or click the Levels button.

   The Levels page includes a section where you specify the overall scale of the worksheet or content pane, as well as its units of measure.
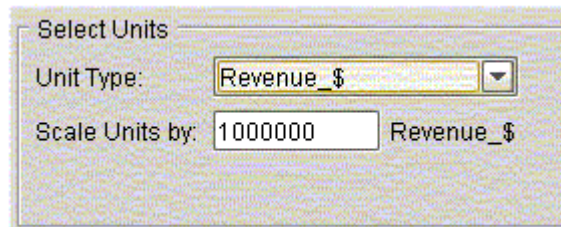
2. In the Scale Units by box, specify the factor by which all numbers are to be divided (for display purposes).

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

To change the unit of measure :

1. Click Worksheet > Aggregation Levels. Or click the Levels button on the toolbar.

2. In the Unit Type box, select the unit of measure to display in the worksheet or content pane results.

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

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

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

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

See Specifying Aggregation Levels, page 12-11.

Filtering the Worksheet or Content Pane

Filters control the combinations that you are able to see. Filtering can have multiple sources:

- A given worksheet or content pane may be filtered. For example, worksheet X might show only Brand X, which means that the worksheet would show only combinations related to Brand X.

- Your user ID may be filtered. For example, if you are an account manager, your user ID might give you access only to your accounts. At any level, you would not be able to see combinations associated with other accounts.

- The data that you share with other users (called the component) might also be filtered. Components divide the data for different sets of users.

Demantra automatically combines all the filters. In the preceding example, if the component is not filtered, if you use worksheet X, you can see only data for Brand X at your accounts.

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

To apply a filter to a worksheet or content pane:

1. Click Worksheet > Filters. Or click the Filters button.

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

2. Find the aggregation level at which you want to filter data and move it from the Available Filter Levels list into the Selected Filter Levels list, using any of the techniques in "Working with Lists".

    > **Note:** This level does not have to be the same as any of the aggregation levels you display in the worksheet or content pane. In fact, typically you filter using a different level than you use to display.

3. In the Available Members list, find a member that you want to include and move it into the Selected Members list, using any of the techniques in "Working with Lists.".

    At this stage, the worksheet or content pane includes only data for this member. (Before you applied a filter at this level, the worksheet or content pane could theoretically include any member of this level.)

4. Continue to move members from the Available Members list into the Selected Members list, until the latter list includes all the members you want.
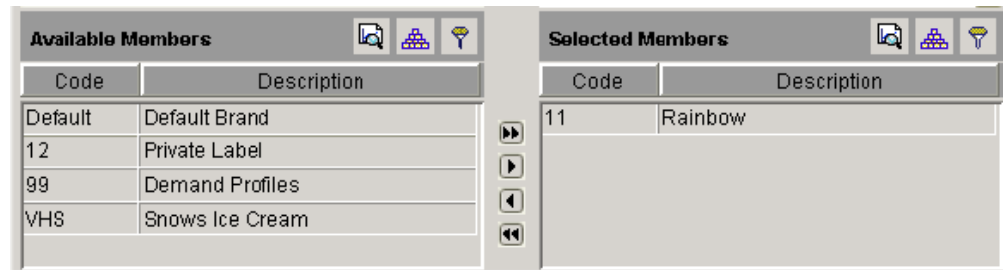
To filter data further:

Once you have applied a filter as described previously, the worksheet or content pane contains only those combinations that are associated with the members you specified. You can further filter the data in exactly the same way.

See Applying Exception Filters, page 12-18.

Managing the List of Members

Depending on how your system has been configured, it might contain a very large number of members. If so, you might want to sort or filter the list or search it. For information, see Managing the Series Lists, page 12-7.

Applying Exception Filters

If you attach an exception filter, Demantra checks the values of the data and displays only the combinations that meet the exception criteria. In contrast to an explicit filter, Filtering the Worksheet or Content Pane, this type of filter is dynamic and can behave differently as the data changes.

Specifically, you define an exception condition that consists of a series, a comparison operator, and a value, for example:
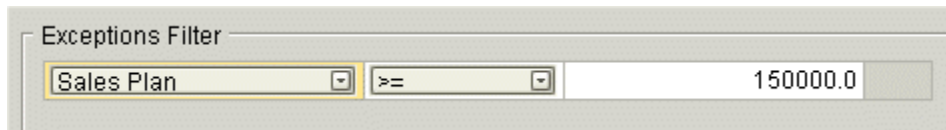
When you open the worksheet, Demantra checks each combination in the worksheet. For each combination, if the condition is met for any time in the worksheet date range, Demantra displays that combination. For example, the worksheet shows combinations that have Sales Plan values greater than or equal to 150000, within the time range included in the worksheet.

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

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

You can apply multiple exceptions to a worksheet. When you apply multiple exceptions, you can relate them to each other via logical AND or logical OR relationships. For example:
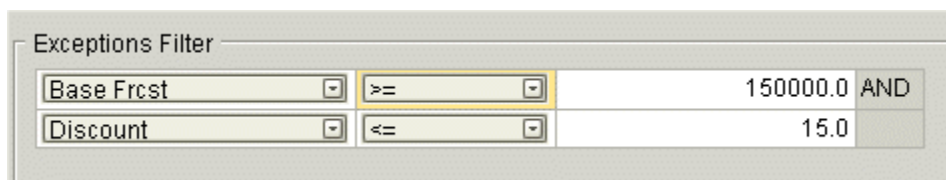
To apply an exception filter:

1. Click Worksheet > Exceptions. Or click the Exceptions button.

   The Exceptions Filter page appears.

2. Click Add.

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

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

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

5. In the third box, type or choose a value.
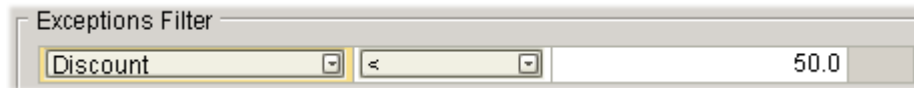
   - For a numeric series, type a number.

   - For a dropdown series, choose one of the allowed values of this series.

   - For a string-type series, type any string. You can use the percent character (%)
     as a wildcard.

   - For a date-type series, type a date or use the calendar control to choose a date.

6. (Optional) You can apply additional exceptions. Select the AND or the OR radio
   button to specify the relationship between the exceptions.
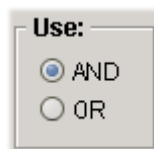
To delete an exception filter:

1. Click the exception and then click Delete.

   See

   - Filtering the Worksheet or Content Pane, page 12-16.

Defining the View Layout

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

To define the layout of a current view:

1. Click Worksheet > Layout Designer. Or click the Layout Designer button.

   The system displays a page where you specify the layout. This page displays the following areas:
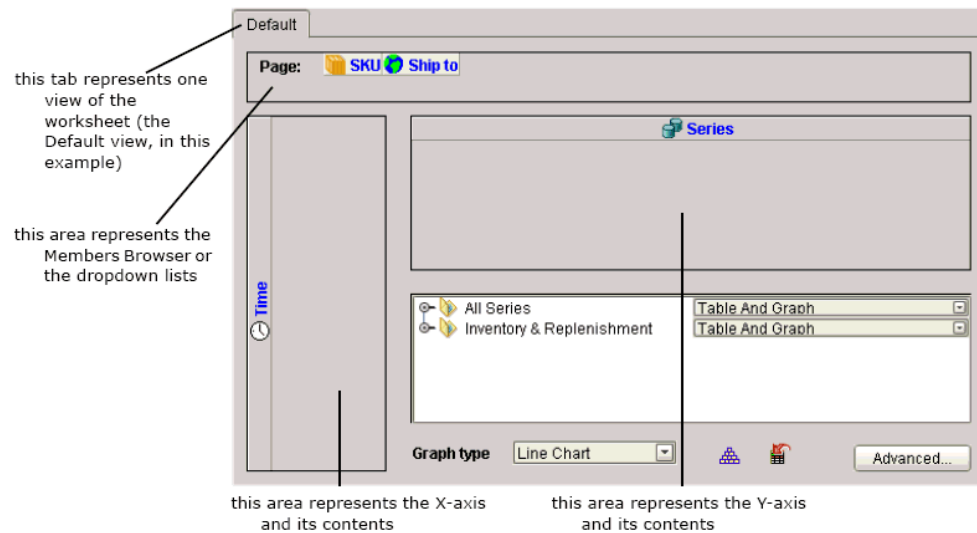
   In addition, this screen displays the following icons:

   - An icon for each aggregation level that you have included in the worksheet. By default, these levels are included in the Members Browser or selector lists.

   - An icon that represents the time axis. By default, time is shown on the x-axis.

   - An icon that represents the series data. Series are shown on the y-axis.

2. To change the worksheet layout, drag the level or time axis icons to the appropriate areas. You cannot move the series icon.

3. To specify the type of graph to use, select a graph type from the Graph Type dropdown list.

4. To specify how to display series in this view:

   1. Click the Sort button.

      The Layout Designer displays a page that shows the order in which this view

currently displays the series.
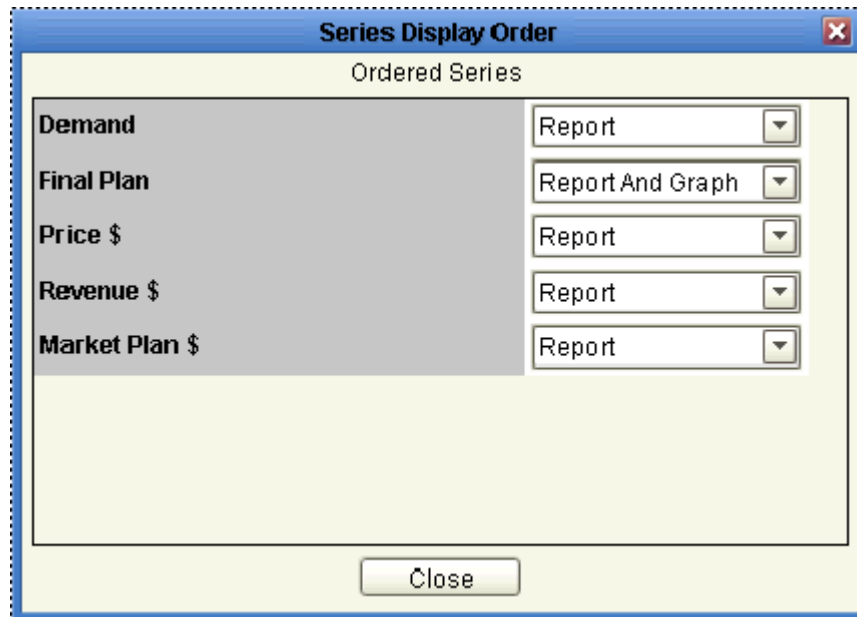
2. To hide a series in this view, click the None option in the dropdown list to the right of the series name.

3. Otherwise, to specify where to display the data for a series, select one of the following options: Table, Graph, Table and Graph.

4. To move a series up or down in this list, click the series name and drag it up or down.

5. When you are done, click Close.

5. Click Save.

6. Rerun the worksheet to see your changes. To do so, click Data > Rerun.

To specify a cross-tab layout:

1. Drag one or more level icons from the Page Item area to x-axis or y-axis areas.

To specify which levels to use in a worksheet view:

By default, all levels you include in a worksheet are used on all views of the worksheet. Within a multi-view worksheet, you often hide some of the levels in some views, so that each view is aggregated differently.

1. Right-click within the Page area of the Layout Designer.

The system displays a menu like the following:
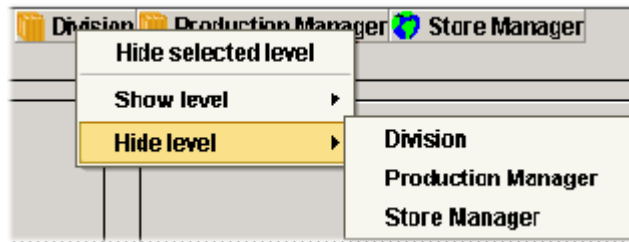
2. Click Hide level and then click the name of the level to hide.

When you hide a level, the worksheet automatically aggregates data across members of that level.

> **Note:** Do not use this option to hide the time axis.

To revert to the default layout of a worksheet view:

1. Click Worksheet > Layout Designer. Or click the Layout Designer button.

2. Click the tab corresponding to the worksheet view you want to reset.

3. Click the Reset button.

In the default layout, all selected levels are visible and are on the X axis. Also, all series are displayed in the graph and table according to their default definitions.

See

• Specifying the Worksheet Elements in a View, page 12-24

• Displaying an Embedded Worksheet, page 12-25

• Filtering a Worksheet View, page 12-26

Adding and Managing Worksheet Views

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

A worksheet can include multiple views, each of which can have a different set of series and a different layout.

To add a worksheet view:

1. Within the Layout Designer, click the Add Worksheet View button.

2. In the popup dialog box, type the name of the new view.

3. Click OK.

To control synchronization between the views:

The views of a worksheet may or may not be synchronized with each other. If they are synchronized, when you edit in one view, that change automatically appears in the other views. Because this can affect performance, sometimes it is best to switch off this synchronization.

Within the Layout Designer, click one of the following buttons, whichever is currently displayed:

- Do not force synchronization between views

- Synchronize data between views

To rename a worksheet view:

1. Within the Layout Designer, click the Rename Worksheet View button.

2. In the popup dialog box, type the new name of the view.

3. Click OK.

To enable or disable a worksheet view:

1. Within the Layout Designer, click the Hide/Display button.

2. The Layout Designer displays a popup list of all the views associated with this worksheet. A check mark is displayed next to each view that can currently be displayed.
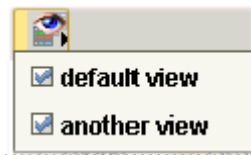
3. For the view interest, select the check box next to the name of the view.

4. Click elsewhere on the screen to close the list of views.

To delete a worksheet view:

Within the Layout Designer, do one of the following:

- Click the tab that corresponds to the worksheet view. Then click the Delete Worksheet View button.

- Click the Delete All Worksheet View button. Then, at the prompt, click Yes.

See

- Defining the View Layout, page 12-20

- Specifying the Worksheet Elements in a View, page 12-24

- Displaying an Embedded Worksheet, page 12-25

- Filtering a Worksheet View, page 12-26

Specifying the Worksheet Elements in a View

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

For each worksheet view, you can specify which of the basic worksheet elements are included: the table, the graph, and so on.

To specify the elements to include in a worksheet view:

1. Click Worksheet > Layout Designer. Or click the Layout Designer button.

2. Click the tab corresponding to the worksheet view you want to modify.

3. Click Advanced... in the lower right.

   Demantra displays the following screen:
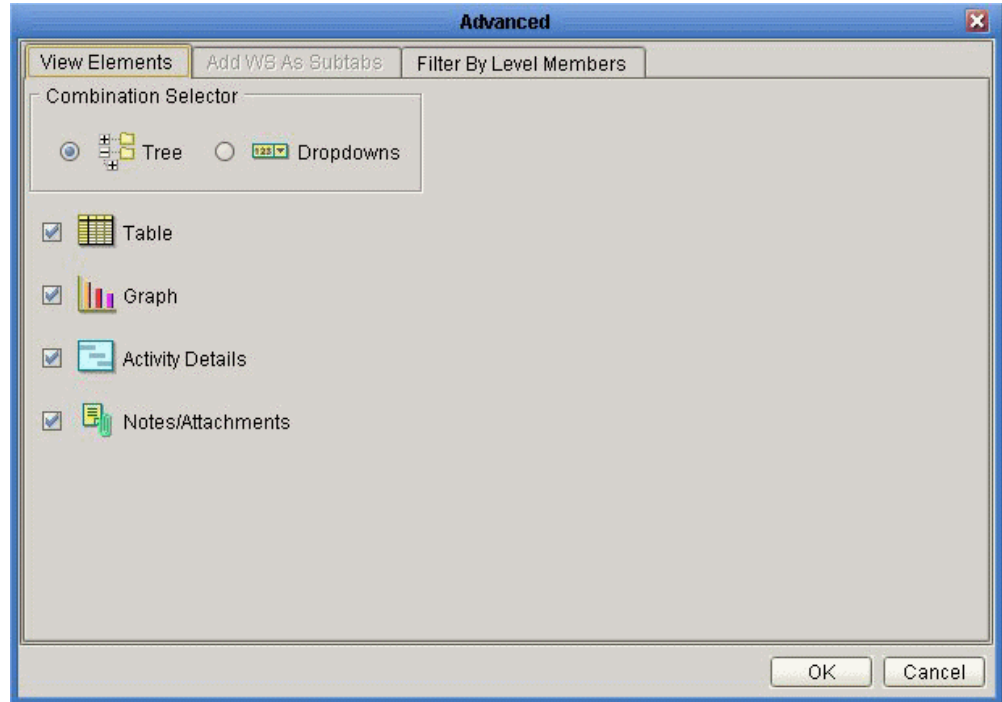
4. For Combination Selector, click either Tree (to display a Members Browser) or Dropdowns (to display dropdown menus instead).

5. Select the check box next to each element you want to include in this view of the worksheet.

6. Click OK.

Displaying an Embedded Worksheet

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

You can display embedded worksheets on subtabs within a view. An embedded worksheet can be at a higher aggregation level than the rest of the worksheet, and the worksheet itself remains editable in general.

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

To display an embedded worksheet as a subtab within a view:

1. Click Worksheet > Layout Designer. Or click the Layout Designer button.

2. Click the tab corresponding to the worksheet view to which you want to add the

sub tab.

3. Click Advanced... in the lower right.

- • Demantra displays the Advanced screen.

4. Click the Add WS As Subtabs tab.

- • Demantra displays a screen like the following:
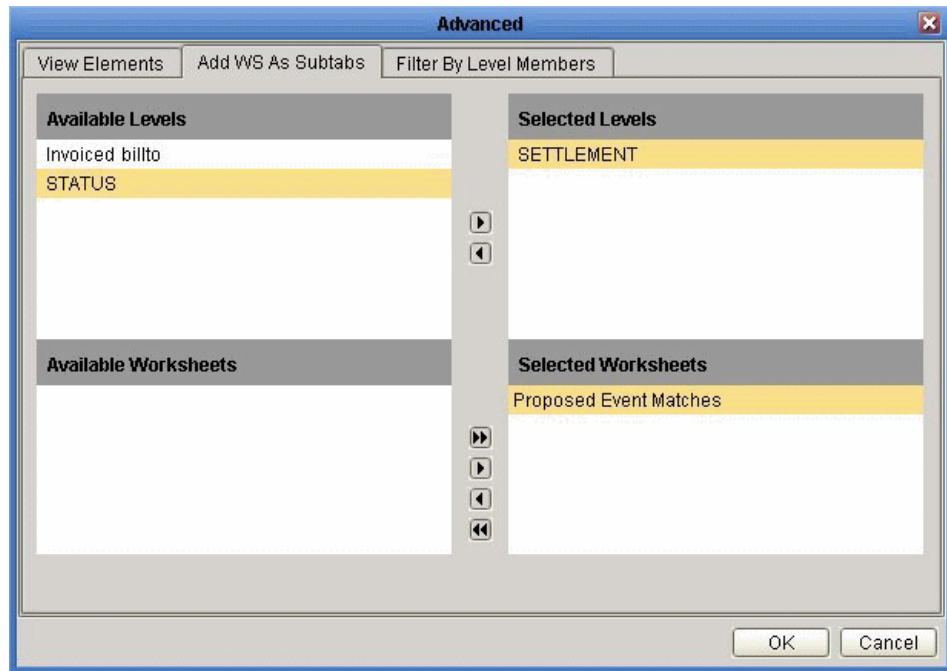
Depending on the level that you select, the bottom part of the screen shows different worksheets that you can add as a subtab to this worksheet view.

5. For Selected Levels, select the level that is associated with the worksheet you want. In general, a worksheet is associated with the levels where it makes sense to use it; this is controlled by your system configuration. You can choose any of the levels that are used in this worksheet.

6. For Selected Worksheets, select the worksheets that you want to display as sub tabs within this worksheet view.

7. Click OK.

Filtering a Worksheet View

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

For each worksheet view, you can filter the view to show a subset of the data in the worksheet.

To filter a worksheet view:

1. Click Worksheet > Layout Designer. Or click the Layout Designer button.

2. Click the tab corresponding to the worksheet view you want to filter.

3. Click Advanced... in the lower right.

   • Demantra displays the Advanced screen.

4. Click the Filter By Level Members tab.

   • Demantra displays a screen like the following:
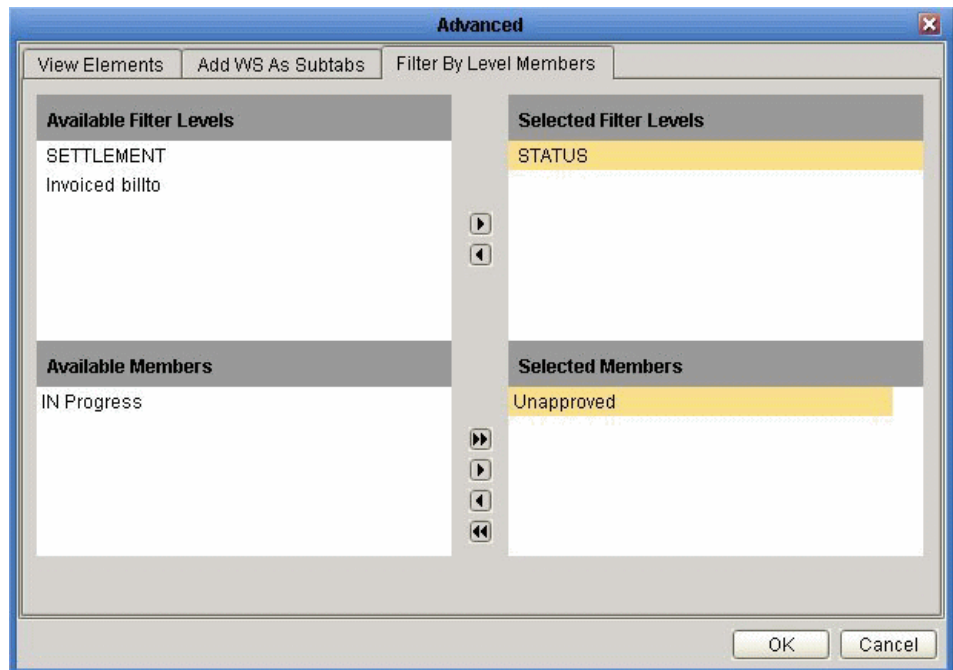
5. For Selected Filter Levels, select the level by which you want to filter this worksheet view. You can choose any of the levels that are used in this worksheet.

6. For Selected Members, select the level members whose data should be displayed in this worksheet view.

7. Click OK.

Sharing Worksheet and Content Panes

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

- Private—available only to you

- Public—available to other users as well. (If you are using Collaborator Workbench, this means the worksheet or content pane is available to others users within the collaborative group.)

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

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

See Configuring the Basics, page 12-4.

Deleting Worksheet or Content Panes

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

To delete a worksheet or content pane:

1. Open the worksheet or content pane.

2. Click File > Delete. Or click the Delete button.

   - Demantra prompts you to confirm the deletion.

3. Click Yes or No.

General Tips on Worksheet Design

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

- For performance reasons, don't select too much data to view, unless there is no other choice.

- If you receive a message saying "out of memory," try the following techniques to reduce the amount of memory that your worksheet selects:

  - Remove series if possible

- Reduce the span of time

- Apply filters

- If you do need to select a large amount of data, use the levels to your advantage. Specifically, use the levels in the Members Browser or selector lists rather than moving them to a worksheet axis. If levels are in the Members Browser or selector lists, each combination in the worksheet is relatively smaller and will load more quickly.

- If you do not plan on working with the Activity Browser, you can switch off the Auto Sync option on the toolbar, and you can also hide the Activity Browser and Gantt chart.

- Remember that you can filter the worksheet by any level, including levels that are not shown in the worksheet. For example, you might want to see data at the region level, but exclude any data that does not apply to the Acme territory. To do this, you would filter the worksheet to include only the Acme member of the Territory level, but you would select data at the Region level.

- A multi-view worksheet is useful in following cases:
  - If you need to edit data at one aggregation level and see easily how that affects higher aggregation levels.

  - If you need to display a large number of series without having to scroll to see each one.

13

PTP Reference

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

This chapter covers the following topics:

- Series
- Item Levels
- Location Levels
- Retailer
- Promotion Levels
- Lookup Tables
- Methods
- Procedures
- Triggers
- Workflows
- Engine Configuration
- Additional Checklist Before Running Optimization

Series

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

PTP provides the following series:

Series	Table	Purpose
# Wks	promotion	Event length in weeks, assuming that each week starts on Monday. Always rounded up to a whole number of weeks.
# Wks O	promotion level	Event length in weeks, for optimized promotion.
# Wks P	promotion level	Projected event length in weeks, as predicted when the promotion was committed.
		This series is configured (via a client expression) to have three branches, as follows:
		• If the value of this series is not null, that means Demantra has captured projections for this promotion. So use that value.
		• If the value is null and if the promotion is Committed, use the value # Wks.
		• If the value is null and if the promotion is not Committed, use null.
$ Sales	sales_data	Annual dollar sales.
$ Sales Proj	sales_data	Planned sales dollars: actuals (for past dates) plus forecast (for future dates)
% ACV Promoted	Promotion	Indicates the expected level of promotion participation based on each stores All Commodity Volume
% ACV ANY PROMO	sales_data	Measures the number of stores that ran any promotion, weighted by store size. Loaded from syndicated data.
% ACV DISP	sales_data	Measures the number of stores that ran displays, weighted by store size. Loaded from syndicated data.
% ACV FEAT	sales_data	Measures the number of stores that ran features, weighted by store size. Loaded from syndicated data.

Series	Table	Purpose
% ACV FEAT&DISPLAY	sales_data	Measures the number of stores that ran combined features and displays, weighted by store size. Loaded from syndicated data.
% ACV FREQSHOPPER	sales_data	Measures the number of stores that ran frequent shopper specials, weighted by store size. Loaded from syndicated data.
% ACV TPR	sales_data	Measures the number of stores that ran temporary price reductions, weighted by store size. Loaded from syndicated data.
% Attained	sales_data	Percentage of sales quota attained.
% Spend	promotion	Event spending (vehicle and buydown), as a percentage of event sales. This is a useful metric of the effectiveness of a promotion; the lower this number, the better.
% Spend O	promotion	Event spending (vehicle and buydown), as a percentage of event sales, for the optimized promotion..
% Spend P	promotion	Projected event spending (vehicle and buy down), as a percentage of event sales, as predicted when the promotion was committed.

% Spend P — PTP uses colors to indicate deviations between the projections and the actuals:

- If the actual value is more than 20% different from the projection in the undesirable sense, the projection is shown in red.

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

This series is configured (via a client expression) to have three branches, in the same way as # Wks P.

Series	Table	Purpose
ActualLY	sales_data	Actual demand one year ago.
Actuals Base	sales_data	Base number of units sold in the past, if there had been no promotions. Loaded from syndicated data.
Actuals Incr	sales_data	Incremental number of units sold in the past, due to promotions. Loaded from syndicated data.
Actuals LY	sales_data	Actual demand one year ago.
Actuals Ttl	sales_data	Total number of units sold in the past. This includes both base and incremental volume. Loaded from syndicated data.
Avg % Disc	promotion	Average percent discount
Avg % Spend	promotion	Average percent spend
Avg B Dwn	promotion	Average buy down for the event
Avg CPIU	promotion	Average cost per incremental unit
Avg Evt Spend	promotion	Average weekly event spend
Avg Inc Rtl Prft	promotion	Average weekly incremental retailer profit
Avg Incr Evt $	promotion	Average weekly incremental event dollars for manufacturer
Avg Incr Evt Vol	promotion	Average weekly incremental event volume
Avg Incr Mfg Prft	promotion	Average weekly incremental manufacturer profit
Avg Lift	promotion	Average lift factor for promotion
Avg Mfg Prft	promotion	Average weekly manufacturer profit
Avg Rtl	promotion	Average unit retail price at shelf. Loaded from syndicated data.

Series	Table	Purpose
Avg Rtl Margin	promotion	Average retailer event margin
Avg Rtl Prft	promotion	Average weekly retailer profit
Avg Rtl sd	sales_data	Average unit retail price at shelf. Loaded from syndicated data.
Avg Ttl Evt Vol	sales_data	Average weekly total event volume
Base Evt $	promotion	Base sales for the manufacturer, during the promotion.
Base Evt $ O	promotion	Base sales for the manufacturer, during the optimized promotion.
Base Evt $ P		Projected base sales for the manufacturer, during the promotion.
Base Evt $ Rtl	promotion	Base sales for the retailer, during the promotion.
Base Evt $ Rtl Act	promotion	Base event dollars from a retailer's perspective, as determined by syndicated data.
Base Evt $ Rtl P	promotion	Projected base sales for the retailer, during the promotion.
Base Evt $ Rtl sd	sales_data	Base event dollars earned by the retailer, as loaded from external systems. By default, this series displays loaded syndicated data.
Base Evt Vol	promotion	Baseline volume during the promotion.
Base Evt Vol O	promotion	Baseline volume during the optimized promotion.
BB /UOM	Promotion	The Bill-Back Accrual Rate for the promotion in the standard Unit of Measure
Base Fcst	sales_data	Base volume: actuals (for past dates) plus forecast (for future dates).

Series	Table	Purpose
BDF Auth	sales_data	Authorized brand development funds, calculated as follows: (base rate + dev rate) * volume + fixed BDF funds
BDF Alloc	promotion	Allocated brand development funds, based on the percentage set by the planner
BDF Alloc %	promotion	Read-only series that indicates how much of event spending (apart from slotting costs) is to be allocated to BDF. Note that BDF Alloc % + MDF Alloc % = 100%
BDF Auth	sales_data	Authorized brand development fund, calculated as follows: (base rate + dev rate) * volume + fixed funds
BDF Bal	sales_data	Remaining (unspent) BDF funds, computed as follows: BDF Auth - BDF Alloc
BDF Base Rate	sales_data	Brand Development Fund Base rate -- displayed to the user in the field.
BDF Dev Rate	sales_data	Brand Development Fund Development rate, entered by corporate HQ.
BDF Fixed Funds	sales_data	BDF fixed funds
Buydown	promotion	The sum of the OI/UOM, BB/UOM, and SD/UOM series. Represents the total variable cost per standard Unit of Measure for the promotion.
Buydown $	promotion	Buy down spend for the promotion, computed as the buy down allowance multiplied by the volume.
Buydown O	promotion	Buy down spend for the optimized promotion.
Can Vol Dir		

Series	Table	Purpose
Canbl $	promotion	Cannibalization dollars for the manufacturer. This considers volume that has been cannibalized from other products.
Canbl $ P	promotion	Projected cannibalization dollars for the manufacturer.
Canbl $ Rtl	promotion	Cannibalization dollars for the retailer. This considers volume that has been cannibalized from other products and from other stores of this retailer.
Canbl $ Rtl P	promotion	Projected cannibalization dollars for the retailer.
Canbl Vol Mfg	promotion	Cannibalization volume for the manufacturer,
Canbl Vol Other	promotion	Cannibalization of sales at other stores, as a result of the promotion. This is a negative number that indicates how many fewer units were sold. To the retailer, this is an undesirable effect. To the manufacturer, this effect is neutral, because the manufacturer cares only about net volume. (In Promotion Effectiveness terminology, this is the so-called "store switching" effect.)
Canbl Vol Own	promotion	Cannibalization of sales of other products by the same manufacturer, as a result of the promotion. This is a negative number that indicates how many fewer units were sold. (In Promotion Effectiveness terminology, this is the so-called "product switching" effect.)
Canbl Vol Rtl	promotion	Cannibalization volume for the retailer. This is the sum of Canbl Vol Other and Canbl Vol Own, both of which are undesirable to the retailer.
COGS	promotion	Cost of goods, as paid by the manufacturer.
COGS sd	sales_data	Cost of goods, as paid by the manufacturer.

Series	Table	Purpose
Cons Promo	promotion level	Consumer overlay, the deal type as seen by the consumer. For example, buy-1-get-1-free. Controls the number of units in the deal and affects the volume.
		Uses the Cons_type lookup table; see "Lookup Tables".
Cons Promo P	promotion level	Projected consumer overlay, the deal type as seen by the consumer, as predicted when the promotion was committed.
		This is shown in red if the actual deal type was different.
		This series is configured (via a client expression) to have three branches, in the same way as # Wks P.
		Uses the Cons_type lookup table; see "Lookup Tables".
CPIU	promotion	Cost per incremental unit sold as a result of the promotion.
CPIU O	promotion	Cost per incremental unit sold as a result of the optimized promotion.
CPIU P	promotion	Projected cost per incremental unit sold as a result of the promotion, as predicted when the promotion was committed.
		PTP uses colors to indicate deviations between the projections and the actuals; see "% Spend P".
		This series is configured (via a client expression) to have three branches, in the same way as # Wks P.
Cumulative % vs Plan	sales_data	Total cumulative actuals, as a fraction of the plan.
Cumulative Actuals	sales_data	The total actuals (base plus incremental) cumulative to date.
Cumulative Plan	sales_data	Cumulative frozen planned volume.

Series	Table	Purpose
End Ship	promotion level	Date when shipments will end for the event
Evt Spend	promotion	Total plan spend (by the manufacturer) for the promotion, sum of buy down, vehicle costs, and slotting.
Evt Spend exS	promotion	Total planned buy down and vehicle costs for promotion. This spend is split between MDF and BDF funds. To control the split, you set the MDF Alloc % series, which controls how much of the spending is funded by MDF.
Evt Spend exS O	promotion	Total planned buy down and vehicle costs for optimized promotion.
Evt Spend exS P	promotion	Projected total planned buy down and vehicle costs for promotion, as predicted when the promotion was committed. PTP uses colors to indicate deviations between the projections and the actuals; see "% Spend P". This series is configured (via a client expression) to have three branches, in the same way as # Wks P.
Evt Status	promotion level	Status of the promotion as shown to users. For allowed values, see "Promotion Status". Also, the color of this series indicates the optimization status of this promotion: • Yellow means that the promotion has been optimized. • Green means that the promotion has been optimized and accepted, so that the promotion is using the optimization results. • White means that the promotion has not been optimized.

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

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

Series	Table	Purpose
Incr Rtl Prft	promotion	Incremental retailer profit due to the promotion, calculated as the incremental volume multiplied by the retailer's margin.
		This profit is in addition to the retailer's usual profit and is thus a measure of the value of the promotion to the retailer.
		This series is displayed in red if the value is negative.
Incr Rtl Prft O	promotion	Incremental retailer profit due to the optimized promotion.
		This series is displayed in red if the value is negative.
Incr Rtl Prft P	promotion	Projected incremental retailer profit due to the promotion, as predicted when the promotion was committed.
		PTP uses colors to indicate deviations between the projections and the actuals; see "% Spend P".
		This series is configured (via a client expression) to have three branches, in the same way as # Wks P.
incr_vol_no_unplan	promotion	Incremental volume caused only by the planned promotions.
Is_self	promotion	For internal use only. This series indicates whether the promotion and the item-location combination are related:
		• 1 means that the promotion applies to the item-location combination.
		• 0 means that the promotion applies to some other item-location combination.
Lift	promotion	Lift factor for the promotion. This is the event volume divided by the base volume.
Lift O	promotion	Lift factor for the optimized promotion.

Series	Table	Purpose
List Price	promotion	List price, the price charged by the manufacturer to the retailer.
List Price sd	sales_data	List price, the price charged by the manufacturer to the retailer.
MDF Auth	sales_data	Authorized market development fund, computed as follows: (base rate + dev rate)*volume + fixed funds
MDF Alloc	promotion	MDF spending that is allocated to fund this event. This is computed as follows: MDF Alloc % * Evt Spend exS
MDF Alloc %	promotion	Editable series that controls how much of event spending (apart from slotting costs) is to be allocated to MDF. Note that BDF Alloc % + MDF Alloc % = 100% Enter 50 for 50%, for example.
MDF Auth	sales_data	Authorized market development fund, computed as follows: (base rate + dev rate) * volume + fixed funds
MDF Bal	sales_data	Remaining (unspent) MDF funds, computed as follows: MDF Auth - MDF Alloc
MDF Base Rate	sales_data	Market development fund base rate.
MDF Dev Rate	sales_data	Market development fund development rate.
MDF Fixed Funds	sales_data	MDF fixed funds.
Mfg Prft O	promotion	Manufacturer's profit from the optimized event. This series is displayed in red if the value is negative.

Series	Table	Purpose
Mfg Profit	promotion	Manufacturer's profit from the event, considering both cost of goods and event spending. This series is displayed in red if the value is negative.
Mfg Profit Var	promotion	
Net Incr Evt $	promotion	Net revenue from the manufacturer's perspective. This considers the total manufacturer's lift dollars and subtracts costs due to cannibalization and pre- and post-effects.
Net Incr Evt $ Rtl	promotion	Net revenue from a retailer's perspective. This considers the total retailer's lift dollars and subtracts costs due to cannibalization (as seen by the retailer) and pre- and post-effects.
Net Incr Rtl Prft	promotion	Net incremental profit for the retailer, after considering cannibalization and pre- and post-effects.
Optimization Status	promotion level	Indicates the status of any optimization that was run on this promotion. Used in the color expression of the Evt Status series. Not meant for direct use.
Optimized	promotion	For internal use only. Indicates if optimization was run on this promotion.
OI UOM	Promotion	The Off-Invoice Allowance Rate for the promotion in the standard Unit of Measure

Series	Table	Purpose
Past End Date	promotion level	Not displayed. This internal series is used to check whether a promotion has already occurred. For any promotion, this series equals one of the following values: • 1 means that the promotion is past; specifically, the max_sales_date is equal to or after the end date of the promotion. • 0 means that the promotion is in the future. Other series use this series within client expressions that have the following general logic: if past end date = 1, use actuals data; otherwise, use forecast data.
Pay Type	promotion	Type of settlement arranged with the retailer for this promotion. Indicates the payment terms between the manufacturer and the retailer for this promotion.
Plan Vol	sales_data	Manufacturer's planned revenue.
Pre Post $	promotion	Total sales made by the manufacturer before and after the promotion, as a result of the promotion. This is shown as a positive number for graphing purposes. These sales, however, are subtracted from the total sales.
Pre Post $ Rtl	promotion	Total sales made by the retailer before and after the promotion, as a result of the promotion. This is shown as a positive number for graphing purposes. These sales, however, are subtracted from the total sales.
Pre Post Vol	promotion	Total volume before and after the promotion, as a result of the promotion. This is generally a negative number.
Promotion Tactic	Promotion	The Promotional Tactic or Vehicle.

Series	Table	Purpose
The Promotional Tactic or Vehicle.	Promotion Level	Indicates the state of promotion integration between Demantra PTP and Siebel TPM. Used to determine whether or not the promotion is editable.
Rtl Prft	promotion	Retailer's profit from the event. This series is displayed in red if the value is negative.
Rtl Prft O	promotion	Retailer's profit from the optimized event. This series is displayed in red if the value is negative.
Sale Price	promotion	Sale price per unit at shelf.
Sale Price O	promotion level	Sale price per unit at shelf, for the optimized promotion.
Sales Quota	sales_data	Sales quota (revenue).
Sales Quota	sales_data	Sales quota (revenue).
Sales Var	promotion	
SD UOM	Promotion	The Scan-Down Allowance Rate for the promotion in the standard Unit of Measure
Shelf Price	promotion	Everyday price to the consumer. In contrast to the Shelf Price sd series, this series is stored in promotion_data for better performance.
Shelf Price sd	sales_data	The everyday price to the consumer, as loaded from external systems. This series is stored in sales_data and is mainly for internal use; see Shelf Price.
Shipments	sales_data	Number of units shipped from the manufacturer to the ship-to destination of the retailer.

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

Series	Table	Purpose
Ttl Evt Vol P	promotion	Projected total event volume, as predicted when the promotion was committed.
		PTP uses colors to indicate deviations between the projections and the actuals; see "% Spend P".
		This series is configured (via a client expression) to have three branches, in the same way as # Wks P.
Ttl Fcst	sales_data	Total volume: base forecast plus incremental forecast.
Ttl Fund Auth	promotion	Total authorized spending, including MDF, BDF, and slotting.
Ttl Fund Bal	promotion	Remainder of total authorized spending, after accounting for spending.
Units	promotion level	Number of units associated with the consumer deal (Cons Promo). Usually this is 1. This is 2 in the case of 2-for-1 deals.
Unmatched $	sales_data	Trade spend not yet matched to an event.
Uplift	promotion_data	
Veh Cost	promotion	Vehicle cost for the promotion.
Veh Cost O	promotion	Vehicle cost for the optimized promotion.
Veh Type O	promotion level	The vehicle type or event type of the optimized promotion.
Veh Type P	promotion level	Projected vehicle type of the promotion, as predicted when the promotion was committed.
		This series is configured (via a client expression) to have three branches, in the same way as # Wks P.
Vehicle Cost DISPLAY	promotion	Vehicle cost for event of type DISPLAY.

Series	Table	Purpose
Vehicle Cost F&D	promotion	Vehicle cost for event of type F&D.
Vehicle Cost F. SHOPPER	promotion	Vehicle cost for event of type F. SHOPPER.
Vehicle Cost FEATURE	promotion	Vehicle cost for event of type FEATURE.
Vehicle Cost NATIONAL TV	promotion	Vehicle cost for event of type NATIONAL TV.
Vehicle Cost TPR	promotion	Vehicle cost for event of type TPR.
Volume Base	sales_data	Base volume aggregated over sales data.
Volume Base Ttl	sales_data	Base volume series used by many other series. This series gives the base volume, if no promotions were run or are run. It checks the value of Past End Date and uses the following logic.
		If past end date = 1, use actuals data; otherwise, use forecast data.
Volume Incr Ttl	promotion_data	Incremental volume series used by many other series. This series gives the incremental volume due to promotions. It checks the value of Past End Date and uses the following logic.
		If past end date = 1, use actuals data; otherwise, use forecast data.

Item Levels

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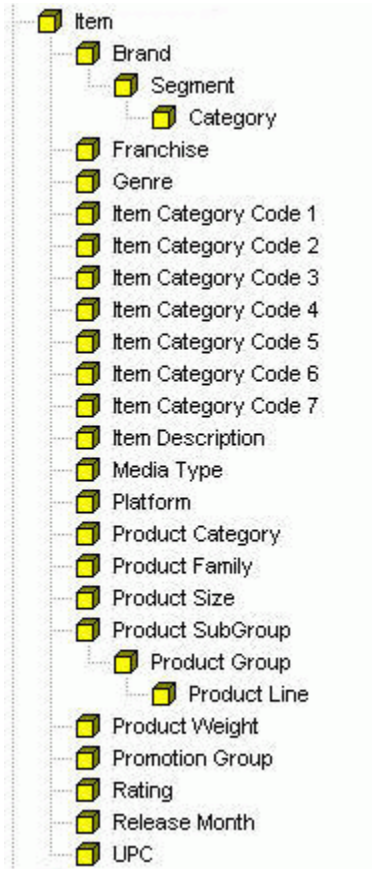
The most commonly used item level is Promotion Group. Some PTP worksheets use Brand or Segment. The other levels are provided for convenience, so that you can create worksheets aggregated at those levels.

The Manufacturer level is populated via the APPPROC_MAINTAIN_TERR_RETAILER procedure. The rest are created by ep_load_main.

Location Levels

PTP uses a variety of different location levels.

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

The Territory-Retailer level is used by the Analytical Engine. This level is populated via the APPPROC_MAINTAIN_TERR_RETAILER procedure. The rest are created by ep_load_main.

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

Retailer

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

Attribute	Purpose
Account Classification	Drop-down list with the following choices: • Growth • Holding • Declining
Avg Everyday Selling Margin	Average selling margin, disregarding promotions.
Class_of_Trade	Drop-down list with the following choices: • Food • Drug • Mass • C-Store • Military
Event Threshold: Display Only	Minimum number of units that should be sold for an event of type Display.
Event Threshold: F Shopper	Minimum number of units that should be sold for an event of type F. Shopper.
Event Threshold: Feat Display	Minimum number of units that should be sold for an event of type F&D.
Event Threshold: Feature Only	Minimum number of units that should be sold for an event of type Feature.

Attribute	Purpose
Event Threshold: Natl TV	Minimum number of units that should be sold for an event of type National TV.
Event Threshold: TPR Only	Minimum number of units that should be sold for an event of type TPR.
Key Competitors	A text field where you can list the key competitors of this retailer.
Min Man Event Margin	
Min Rtl Event Margin	Minimum margin that this retailer must make on an event. Promotion Optimization considers only events that provide at least this much margin.
Name	Name of the retailer.
Number of Active Stores	Number of active stores that this retailer operates.
Ship Timing: Display Stock #Wk	Specifies how much earlier this retailer likes to receive any items to be placed in display stock. Specify as the number of weeks needed before the start of the promotion.
Ship Timing: Displays # Wks	Specifies how much earlier this retailer likes to receive any displays to be placed in the stores. Specify as the number of weeks needed before the start of the promotion.
Ship Timing: Reg Open Stock Wks	Specifies how much earlier this retailer likes to receive any items to be placed in open stock. Specify as the number of weeks needed before the start of the promotion.
Slotting Fees per item	Amount that this retailer charges to place the items on the shelf, per item.
Use Default Profile	Controls whether to update this profile by getting the default values for all these attributes.
Veh Costs: Display Only	Default cost for an event of type Display for this retailer.
Veh Costs: F Shopper	Default cost for an event of type F. Shopper for this retailer.
Veh Costs: Feature & Display	Default cost for an event of type F&D for this retailer.

Attribute	Purpose
Veh Costs: Feature Only	Default cost for an event of type Feature for this retailer.
Veh Costs: Natl TV	Default cost for an event of type National TV for this retailer.
Veh Costs: TPR Only	Default cost for an event of type TPR for this retailer.

Corporate

This level allows retailers to be defined at both the corporate name level and the regional level.

Promotion Levels

PTP uses a variety of different promotion levels.

The following sections provide details on these levels:

- "Promotion"

- "Promotion Status"

- "Promotion Type"

- "Scenarios"

- "Optimization Goal"

- "Plans"

Plan

This level stores a set of promotions for a particular account over a given time period.

Attribute	When Displayed	Purpose
Account	-	The account on which these promotions will be run.

Promotion Transfer Status

This level facilitates the transferring of promotions to Siebel. It stores the lock status, which ensures that data doesn't become out of sync during the transfer.

Promotion

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

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

Attribute	When Displayed	Purpose
Max Buydown	When optimizing	Maximum allowed buydown for this promotion. If Promotion Optimization calculates an optimal buydown, the buydown will not exceed this value.
method_status	-	Uses a lookup table that should not be edited.
Min Rtl Margin Override	When optimizing	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.
Name	When creating or editing	Name of the promotion. Does not have to be unique.
Optimal Budget	-	-
Optimal Lift	-	-
Optimal Price Decrease	-	-
Optimal Profit	-	-
Optimal Revenue	-	-
Optimal Type	-	Indicates the optimal vehicle type for this promotion. This attribute is a lookup attribute that uses the Promotion Type level.

Attribute	When Displayed	Purpose
Optimization Goal	When optimizing	Select one of the following goals for this promotion: • Maximize Revenue • Maximize Profit • Maximize Units This attribute is a lookup attribute that uses the Optimization Goal level.
Optimization Range End	When optimizing	By default, Promotion Optimization assumes that you want the optimized promotion to fall within the span of time of the original promotion. If you want Promotion Optimization to search for a better time for this promotion, use these attributes to specify the range of time for optimization to consider.
Optimization Range Start	When optimizing	
Optimization Status	Never displayed	Status of the optimization process on this promotion. Uses a lookup table that should not be edited.
Population	When creating or editing	Combinations where this promotion will run and dates of the promotion.
Promotion Status	Not used.	Ignore this attribute. It is not used.
Promotion Type1	Never displayed	Current vehicle type for this promotion. This attribute is a lookup attribute that uses the Promotion Type level.
Return on Investment (ROI)	-	-
Scenarios	When creating or editing	Scenario to which this promotion belongs. This attribute is a lookup attribute that uses the Scenarios level.
Start Ship	When creating or editing	-

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

Promotion Status

This level contains the PTP promotion statuses.

Promotion Type

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

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

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

Scenarios

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

- Actuals contains promotions from previous years. These promotions are excluded from most PTP worksheets because they fall outside the span of time used in these

worksheets.

- Current Year should contain the promotions that are planned for the current fiscal year.

- Sandbox should contain all promotions that are not yet planned.

Optimization Goal

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

Plans

This level is not used in PTP worksheets.

Lookup Tables

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

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

Cons_type

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

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

Field	Required?	Data type	Purpose
SELF_SHAPE_INDIC ATOR		NUMBER(5)	
IG_SHAPE_INDICAT OR		NUMBER(5)	
OMIT_SEASONAL		NUMBER(5)	
FICTIVE_CHILD		NUMBER(10)	
LAST_UPDATE_DA TE		DATE	

Pay_Type_lookup

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

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

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

Methods

PTP uses the following custom methods.

Optimize Promotion

This method uses the Call Promotion Optimizer predefined workflow. The Call Promotion Optimizer workflow consists of three steps in addition to the edit member step:

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

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

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

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

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

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

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

Accept Optimization

This method saves the optimized promotion, overwriting the previous details. Specifically, it copies data from the optimized series to the corresponding standard series, for the selected promotion. For example, it copies data from # Wks O to # Wks.

This method uses the AcceptOptimization predefined workflow. This workflow consists of one step (which calls the APPPROC_ACCEPT_OPTIMIZATION procedure).

Procedures

PTP uses the following custom procedures.

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

Procedure	Purpose
APPPROC_POST_DATA_LOAD	This procedure completes the last steps needed during data loading: • Updates the LAST_DATE_BACKUP parameter in the INIT_PARAMS_0 table to equal the last sales date in the system. • Runs the APPPROC_COPY_DEF_RETAILER procedure. • Runs the APPPROC_MAINTAIN_TERR_RETAILER procedure. • Updates the promotion_data table with values loaded into sales_data. • Updates sales_data .vol_base_ttl according to the sdata5 column that was loaded. This initiates the APPTRIG_VOLUME_BASE_UPDATE_SD trigger; see Triggers, page 13-32.
APPPROC_POST_OPTIMIZATION	Used by Promotion Optimization.
APPPROC_PRE_OPTIMIZATION	Used by Promotion Optimization.

Instead of running procedures directly, use the workflows provided by PTP.

See Workflows, page 13-33.

Triggers

PTP uses the following custom triggers.

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

Trigger	When activated	Action
A PPTRIG_INSERT_PROMOTION_PAST	When inserting promotion in the past	Updates the following series for this promotion: • Avg Rtl sd • Incr Evt Vol Act • Base Evt $ Rtl Act • Incr Evt $ Rtl Act
AP PTRIG_SHELF_PRICE_UDPATE_SD	When updating shelf price on sales_data.	Copies that data into promotion_data.
APP TRIG_VOLUME_BASE_UPDATE_PD	When inserting a promotion	Gets sales_data.volume_base_ttl and updates the field by the same name in promotion_data.
A PPTRIG_VOLUME_BASE_UPDATE_SD	When updating volume_base_ttl in sales_data.	Copies that data into promotion_data

Workflows

PTP uses the following workflows:

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

Workflow	When to run	Description
CopyRetailerDefaults	Run this each time you edit a retailer to use the default profile and each time you edit the retailer defaults in the Business Modeler.	Executes the APPPROC_COPY_DEF_RETAILER procedure.
Create Member	Do not run directly.	Used internally when a user creates a member of a level.
Delete Member	Do not run directly.	Used internally when a user deletes a member of a level.
DoNothing	Do not use.	Do not use.
Edit Member	Do not run directly.	Used internally when a user edits a member of a level.
Import Promo Data	Not required.	Provided for you to use if you want to load data manually.
ImportPromotionLevels	Not required.	Provided for you to use if you want to load data manually.
Paste Member	Do not run directly.	Used internally when a user pastes a member of a level.
Run App Proc After Batch Engine	Run this after you run the Analytical Engine.	Runs the following required procedures: • APPPROC_BLE_ACTUALS_LY • APPPROC_BLE_VOLUME_BASE_FUTURE
Run Drop Temps	Run this daily.	Executes the APPPROC_DROP_TEMPS procedure.
Run Engine and BLE		Do not use.
runprocsteps	Do not run directly.	Used by the Optimize Promotion method.

Engine Configuration

This section describes the basic engine configuration in PTP.

Forecast Tree

The PTP forecast tree is as follows:

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

Parameter Settings

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

Setting	Value	Notes	Needed for
COMPETITION_ITEM	352	This is the manufacturer level.	Analytical Engine

Setting	Value	Notes	Needed for
COMPETITION_LOCATION	237	This setting refers to the Competition_Location group table, which has only one row. This has the same effect as setting COMPETITION_LOCATION equal to the Retailer level.	
CalcOptimizationInput	yes		Promotion Optimization
StartAverage	0		
AverageHorizon	52	Specify the length of time, in base time units, to use in calculating the average baseline forecast. Typically one year or half a year is suitable.	
BottomCoefficientLevel	2		
TopCoefficientLevel	3		

Engine Models

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

Additional Checklist Before Running Optimization

1. The application server currently must be a WINDOWS machine in order to run optimization.

2. The application server must have Oracle or SQL Server clients installed.

3. TNS entry in TNSNames.ora where name matches the DBNAME entry in the APPSERVER.PROPERTIES file which can be reached in <ROOT> Collaborator\demantra
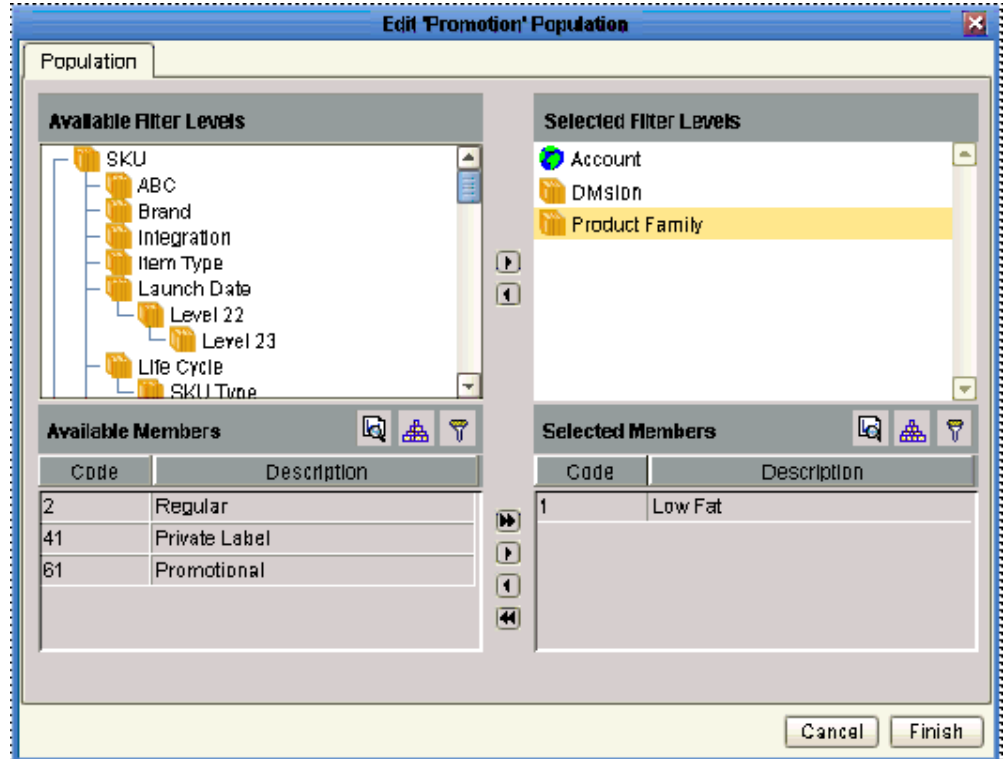
4. From Business Modeler, navigate to system parameters.

   Parameters > System Parameters

   In the system tab, check that the parameter AppServerLocation contains the correct path where the application is installed. If there is a mismatch, enter the correct path into the parameter application_root

   Example
   Example setting: F:\Program Files\Integration 7.1.1 \Collaborator\demantra

5. Navigate on the desktop to My Computer. Right click, and then choose Properties from the right-click menu.

6. Choose the Advanced tab, and then click Environmental Variables.

   Verify that the path variable contains path to
   <ROOT>\Collaborator\demantra\optimization\dll.

14

Administration

This chapter covers the following topics:

- Running the Analytical Engine
- Running Required Workflows
- Managing the PTP Users

Running the Analytical Engine

You should run the Analytical Engine in batch mode probably about once a week. This generates a forecast for all the data in the system.

1. Click Demantra > Demantra Spectrum release > Engine Administrator.

2. Click File > Run Engine.
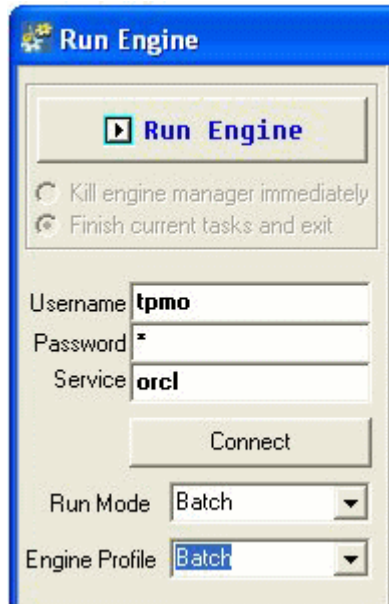
3. For Username and Password, enter the username and password of the database user that stores the Demantra data. (In the installer, this user is referred to as the Oracle Database User).

4. For Server, enter the Oracle SID of the database.

5. Click Connect.

6. For Run Mode, click Batch.

7. For Engine Profile, click Batch.

8. Click Run Engine.

   After running the Analytical Engine, you should run the Run App Proc After Batch Engine workflow.

   See Running Required Workflows, page 14-2.

Running Required Workflows

PTP provides several workflows that perform necessary back-end tasks. An administrator will need to run these workflows periodically. To run workflows, you use the Workflow Manager, a Web-based tool that can be accessed only by users with the System Manager permission level.

This section lists these workflows and describes how to run them.

Required Workflows

You should run the following workflows periodically:

Workflow	When to run
CopyRetailerDefaults	Run this each time you edit a retailer to use the default profile and each time you edit the retailer defaults in the Business Modeler.
Run Drop Temps	Run this daily.
Run App Proc After Batch Engine	Run this after you run the Analytical Engine in batch mode.

Logging on to the Workflow Manager

1. Click Demantra > Demantra Spectrum release > Collaborator Workflow.

2. In the Log On dialog box, enter your user name and password.

   The Workflow Manager comes up, displaying a list of workflow schemas.

Starting Workflow Instances

To start a workflow instance

Click Start next to the schema that you want to start.

Viewing Workflow Status

You can view all the status of all public workflow schemas and all private workflow schemas that you created. This means that you can see how many instances of those schemas are running, as well as the status of each instance.

To view overall status of the workflows

The Workflow Manager displays the overall status information for the workflows.

Each row corresponds to a workflow schema. The Instances column indicates how many instances of this workflow schema are currently running, if any. The Status column uses the following color codes:

Green	The workflow schema is live and you may execute it, creating a workflow instance.
Red	The workflow schema is archived and cannot be executed.
Yellow	There is a data error or other fault within this schema.

To view the currently running instances of a schema

1. Click the Instances link in the row corresponding to that workflow.

   The Workflow Manager lists all the instances of that schema that are currently running.

2. When you are done, click Back.

Scheduling Workflow Instances

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

manually, as described in "Starting Workflow Instances".

To schedule a workflow instance

1. If the workflow schema is not visible, use the dropdown menu and select the name of a schema group to which it belongs. Or select All.

2. Click Schedule in the row corresponding to that workflow.

   The system displays the Schema Scheduler page, which lists all the times when Workflow Engine will start an instance of this schema.
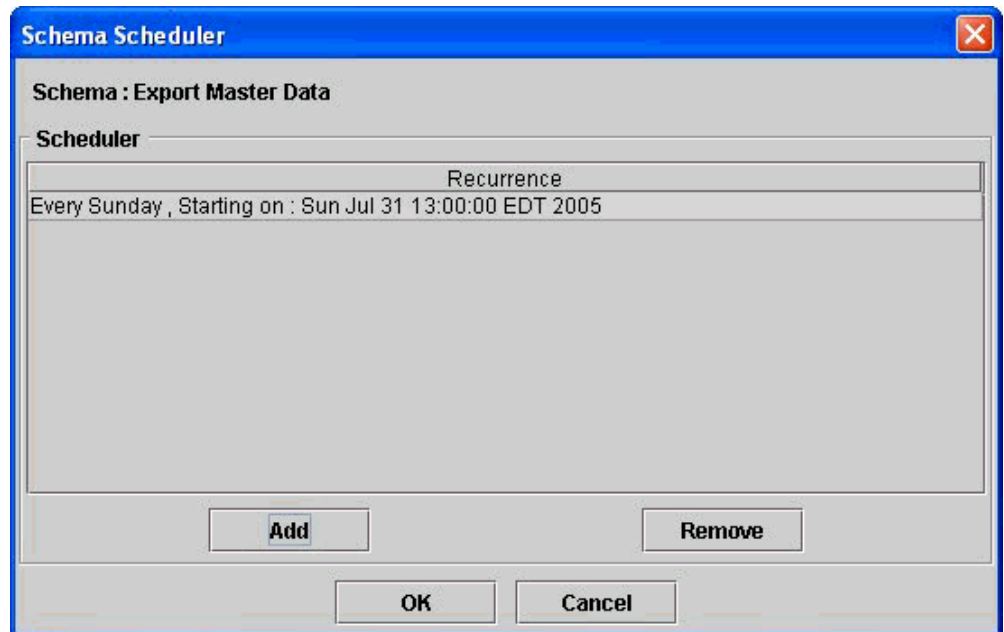
3. Click Add.

4. In the Schedule Schema dropdown list, select the option that specifies how often to start an instance of this workflow:

- Daily

- Weekly

- Monthly

- Once

- At Startup (This option launches the workflow whenever the Web server is started.)

- Periodic (in this option, you can start a workflow at periodic intervals (measured in seconds, minutes, hours, days, weeks, months, or years. Note that you cannot choose the starting time.)

Depending on the choice you make here, the system displays additional scheduling options in the bottom part of the page.

5. In the rest of the page, finish specifying the schedule.

6. Click OK.

To unschedule a workflow instance

1. On the Workflow Management page, click Schedule in the row corresponding to that workflow.

    The system displays the Schema Scheduler page. This page displays one row for each scheduling entry for this workflow.

2. Click the row corresponding to the scheduling entry you want to remove.

3. Click Remove.

Stopping Workflow Instances

You can stop any workflow instance that you started. You cannot stop a workflow instance started by another user.

To stop a workflow instance

1. If the workflow schema is not visible, use the dropdown menu and select the name of a schema group to which it belongs. Or select All.

2. Click the number in the Instances column that corresponds to that workflow.

    The system lists all the instances of that schema.

Process ID	Started at	Initiator	Current step	Action
7	Mon Dec 08 14:53:16 EST 2003	dp	ExportMasterData	Terminate

Back ← Refresh

> **Note:** Instances that show in red are instances of Fail-To-Execute Step steps. For more information, see the *Oracle Demantra Foundation Implementation Guide*.

3. Click Terminate next to the instance that you want to stop.

4. Click OK.

    The instance is stopped and is removed from the list of instances.

    > **Note:** Terminate stops only the workflow instance itself. It does not cancel any work that the instance may have initiated (such as tasks that were sent or requests placed in the Simulation Engine or

Business Logic Engine queues). These items must be cancelled manually.

See the *Oracle Demantra Implementation Guide*

Managing the PTP Users

To manage the PTP users, you use the Business Modeler, a desktop tool that can be accessed only by users with the System Manager permission level. (Other users can log into the Business Modeler, to change their own passwords, but no other options are available to them.)

Logging onto the Business Modeler

Before starting the Business Modeler, make sure that the database is running.

To start the Business Modeler

1. On the Start menu, click Programs.

2. Click Demantra > Demantra Spectrum release > Business Modeler.

   A login window appears.

3. Enter your user name and password.

4. Click Login.

Copying a User

The easiest way to create new users is to copy existing users and edit the details as needed.

To copy a user

1. In the Business Modeler, click Security > Create/Modify User.

   The Create/Modify User dialog box appears.

2. Click the button of the user you want to copy, and then click Create Copy.

   The User Details dialog box appears. Some of the information, such as user name, is blank. Other details, such as the company name, are copied from the original user.

3. Specify the user name and password for the new user.

4. Make other changes as needed.

5. Do one of the following:

    • Click Next to continue editing information for the new user. Demantra initially uses all the same values as for the original user.

    • Click Finish.

Creating or Modifying a User

To create or modify a user

1. In the Business Modeler, click Security > Create/Modify User.

2. Next:

    • To create a new user, click the New User button, and then click OK.

    • To modify a user, click the button of that user then click OK. Or double-click the icon of the user whose details you want to modify.

    The User Details dialog box appears.

Enter User Details

User :	Jeff_Wilson
Password:	********************
Permission Level:	Supervisor
Language:	English
First Name:	Jeff
Last Name:	Wilson
Company Name:	Rory's International
Phone Number:	
Fax Number:	
E-Mail Address:	jwilson@rorys.com

Integrate User: ☐

3. Specify basic user details as follows:

    1. Under Enter User Details, type the following information in the appropriate boxes (or select from the dropdown lists):

        • The user name, password, permission level, and the language in which the system will be operated.

- The first and last name of the user, the company name, phone and fax number, and the email address.

2. For Permission Level, use System Manager if this user needs access to the Business Modeler and the Workflow Manager. Otherwise, use Supervisor.

3. Click Next.

The User Modules dialog box appears. Here you specify which Demantra user interfaces this user can access.

Name	Status	Available Named Users	Defined Concurrent Users
Demantra Administrative Tools	✔	9983/9999	9999
Demantra Demand Planner	✔	9982/9999	9999
Demantra Demand Planner Web	✔	9982/9999	9999
Demantra Collaborator Workbench	✔	9981/9999	9999
Demantra Anywhere	✔	9990/9999	9999
Demantra Promotion Effectiveness	✔	9981/9999	9999
Settlement Management		9999/9999	9999
Demantra Promotions Optimization		9999/9999	9999

4. Click the check box next to each module that the user needs to work with. Then click Next.

The New User - Select User Series dialog box appears. This dialog box allows you to determine what data series will be active for the new user, from the entire set of series in this component. Each list is a collapsible list of series groups and the series in them.
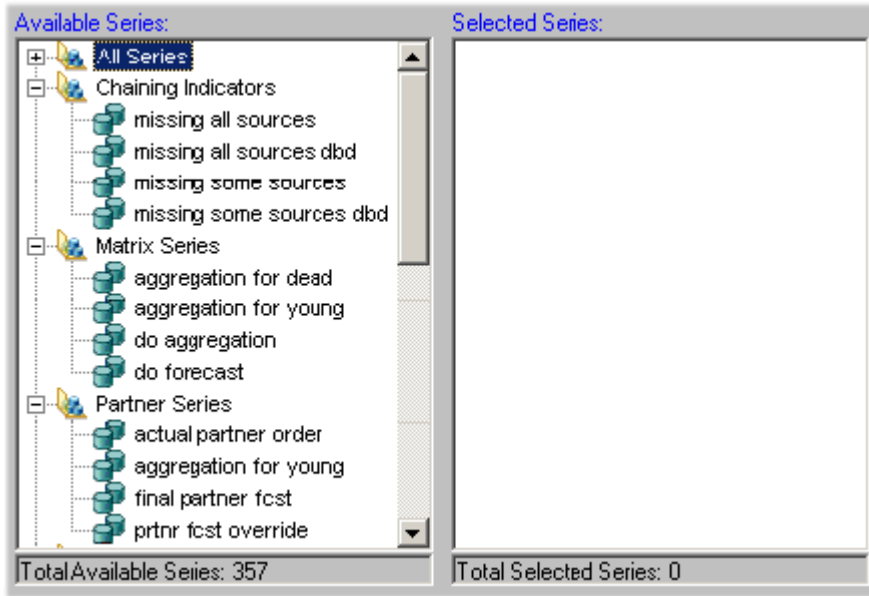
If a series is not active for a user, it is not available when the user creates worksheets and is not viewable in existing worksheets to which the user has access.

5. Specify the series that a user can see, as follows:

   1. Move all series that you want into the Selected Series list. To do so, either double-click each series or drag and drop it.

   2. Remove any unwanted series from the Selected Series list.

      Note: You can also move an entire series group from one list to the other in the same way.

   3. When you are done specifying series, click Next.

      The New User - Select User Filters dialog box appears. This dialog box lets you filter the data that the user can see; specifically, you control which levels and which members of those levels the user can see.
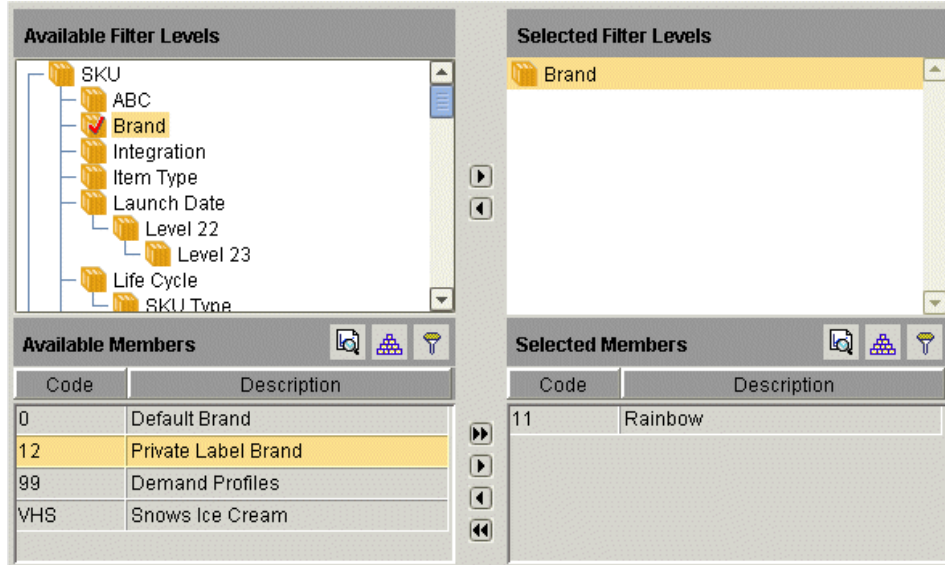
6. Filter the data that the user can see, as follows:

   1. Click a level in the left side of the dialog box and drag it to the box on the right. Or double-click a level in the left side.

   2. Now specify which members of this level the user can see. To do so, click a member in the list, and then click the right arrow button. Or double-click the member you want to filter out.

      The system moves the selected members to the box on the lower right side. Now the user can see only the selected members of this level. In the preceding example, the user can see only data that is associated with the Rainbow brand.

      > **Note:** The Selected Members list cannot include more than 200 members.

   3. Repeat the preceding steps for each filter you want to add. Each filter automatically limits the choices available in subsequent filters.

   4. When you have appropriately filtered data for the user, click Next.

   The New User - Select User Groups dialog box appears. This dialog box allows you to select the group or groups to which the new user will belong. Members of a group can see each other within Who's Online.

7. Specify the collaboration groups to which a user belongs, as follows:

   1. Move all groups to which the user should belong into the Selected Groups list.

To do so, either double-click each group or drag and drop it.

> **Note:** You can also select and move multiple groups with the standard Ctrl+click or Shift+click actions.

2. Remove any unwanted groups from the Selected Groups list.

3. Click Next.

8. Click Finish.

Deleting a User

To delete a user

1. In the Business Modeler, click Security > Create/Modify User.

2. Click the button of the user you want to delete, and then click Delete.

   A question box appears, asking if you are sure you want to delete the selected user.

3. To delete the selected user, click Yes.

See the *Oracle Demantra Implementation Guide*

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