

# Configuring planning boards

Planning boards make planning in BMS easier and more flexible as they let you create several highly configurable planning windows in your system. By using this tool you can plan on different levels of input, periods and be in control of every aspect of the planning.

## Introduction

This Quick guide will show you how to configure the planning board. The data that needs to be filled in is grand total lines and group level(s). In the end you have configured a planning board.

## Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software.

On the last page it is described how to set up the Security to activate, view and edit the described tool.

## Create a planning board

### 1 Add a new planning board

Click *File* and *New planning board*.



### 2 Name the planning board

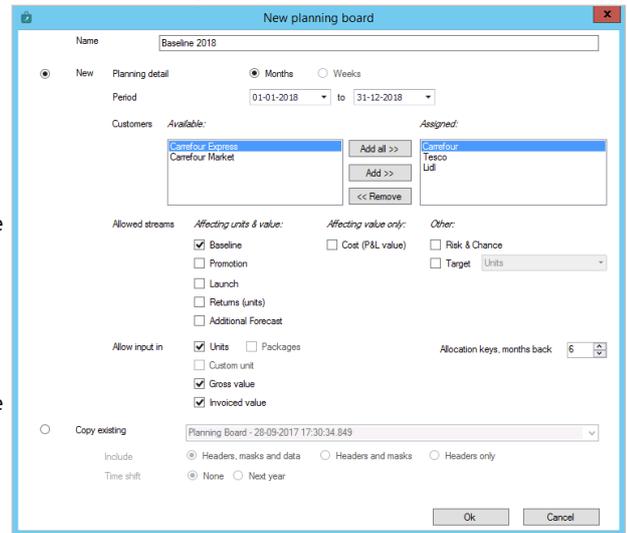
Enter a name for the planning board.

### 3 Choose Planning detail

Choose if you want the planning period to be planned per month or by weeks.

### 4 Define the period

Define the period, where the planning board will be valid within.



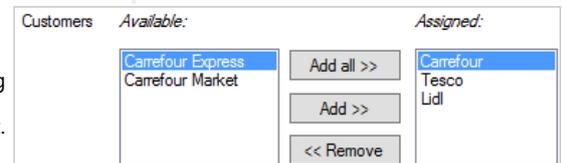
If you select months as a planning detail, BMS will always set the period dates from 1st of chosen from-month to 30th/31st of the last chosen month.

If you select weeks as a planning detail, BMS will always set the period days from Monday of chosen from-week to Sunday of the last week chosen.

This is an automatic function. No matter which date of month or week you choose, BMS will set as default following the above mentioned rules.

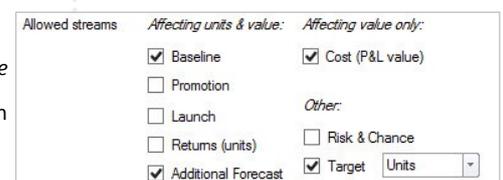
### 5 Assign customer(s)

Add the customer(s) you want to assign the planning board to by adding it/them to the assigned field. Use the Add all, Add, and Remove buttons to edit the list. Multi Click and Add or Remove is possible.



### 6 Allowed streams

Check which stream(s) you want to plan on. Select from the lists of *Affecting units & value*, *Affecting value only*, and *Other*. You can select from one to all and this will be the default stream for your planning board.



The guide *may* contain important general notices. These will be marked with an exclamation icon.



Tips and tricks are marked with an Info-icon.



Questions & Answers note relevant to the topic at hand.

## Quick guide for BMS



You can always edit the stream selection from the Manage planning boards. This will be described later in this guide.



You can always edit the Allow input selection from the Manage planning boards. This will be described later in this guide.



You can always edit the Allocation key period selection from the Manage planning boards. This will be described later in this guide.

### 7 Allow input

Select which value you want the input to be. You can select from one to all, and this will be the default Input for your planning board.

Allow input in  Units  Packages  
 Custom unit  
 Gross value  
 Invoiced value

### 8 Allocation keys period

Select the amount of months back you want to display Allocation keys.

Allocation keys, months back 6

### 9 Save

Click on OK to save the Planning board. All the Planning boards can be found at Manage planning boards.

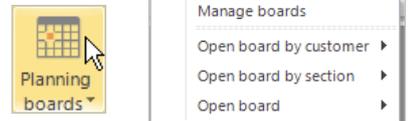
Ok

## Defining planning boards

Planning boards can be configured using configuration tool in BMS. First, you should add planning masks, as they define what products you will be able to plan on. Then you have three levels of groups available. The groups are higher levels of input that can be used for planning or summing over the planning masks. At last, you can add a grand total. The following describes how to enter configuring mode and save the changes, while the next paragraphs describe the configuration possibilities in detail.

### 1 Open a planning board

You have several options to open a planning board. You can open it based on a Customer, a Section, from Manage boards, or just bulk open it. Select from the lists and click to open.



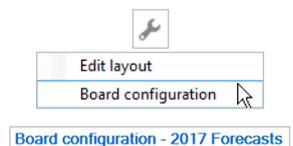
### 2 Select Section

From the list select the Section you want to open.

2017 Forecasts  
Section: Please select:

### 3 Open Board configuration

Click on the wrench icon in upper right corner of the tab, and click on Board configuration. The main window will change to configuration mode and an information text will appear on the tab, for as long as you are in Configuration mode.



### 4 Exit Board configuration

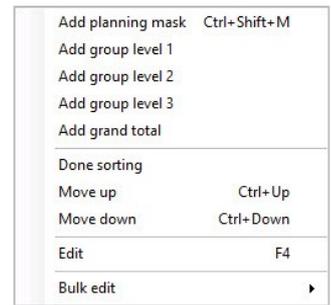
When you are done, click on *Exit configuration* to close the configuration window.

Exit configuration

Add a planning mask

**1 Add a planning mask**

Right-click in the planning board window, and select Add planning mask.



**2 Enter the name**

Enter a name for the mask.

Mask name

**3 Select a stream/type**

Select the stream you want for your mask. You can only select one stream.

You can also create a mask for a specific P&L line, if you click Value, choose P&L line and select the P&L line you want it for.

Stream/type  Baseline  Cost, choose P&L line:   Risk/chance (this is a separate scenario)  Target

Promotion  Launch  Returns (units)  Additional Forecast

**4 Assign customer**

Add the customer(s) you want to assign the planning mask to by adding it/them from Available field to Assigned field.

Use the Add all, Add, and Remove buttons to edit the list. Multi click and Add or Remove is possible.

Assign customers	Available:	Buttons	Assigned:
	Carrefour Express Carrefour Market	Add all >> Add >> << Remove	Carrefour Tesco Lidl

**5 Add product hierarchy**

Add the product(s) you want the mask to be assigned to. Click Browse to the right and select the product(s) you want to add from the window that opens.

You can select, whether these products should be rules or the mask should be created for each of these products.

Also you can copy from Excel and click Paste to add your products.

Product hierarchy  Specific products (s) - a mask will be created for each product  Rules

**6 Store level**

If you want you can allocate specific stores of customer to the specific planning mask. Click Browse to open and select the stores you want to include. Also you can copy from an Excel file and click Paste to add the stores.

The stores are available only when only customer is assigned to the Planning mask.

Stores  Leave empty if you dont want allocation to stores. If more stores are selected a mask for each store will be created

**7 Save the planning mask**

When you are done, click on Ok. In the Planning board there will be created a new mask.

Click on Exit configuration to close the configuration window.



You can select Stream from the checked Allowed streams you marked when creating the planning board. The other, unchecked, Streams will appear here as Inactive.



You can add as many group levels as you want. Also, you can add group level 2 and 3 to create a hierarchy.

### Add group levels

#### 1 Add a group level

Right-click in the working area of the planning board and click on Add group level #.

Add group level 1

Add group level 2

Add group level 3

#### 2 Name the group level

Enter the name of the group level.

Group level 1 Promotional products

#### 3 Position

Select where you want to place the group level header. Click either top or bottom.  
 If you select top, the group level will sum up and calculate the planning masks located below it. Similarly, the bottom placed group level sums up and calculates the masks above it.

Position  Top (summarizes the input masks below)  Bottom (summarizes the input masks before)

#### 4 Select totals and KPIs

Check which totals and KPIs you want to display for your groups.

Shown totals  Group total  Allow input (cascade to input masks)

Accumulating group total

% of grand total sum

% of accumulating grand total sum

Group total evolution %

Accumulating group total evolution %

#### 5 Save the group level

When you are done, click on Ok. In the Planning board there will be created the new group level.  
 Click on Exit configuration to close the configuration window.

Ok

Exit configuration

### Add a grand total

#### 1 Add a grand total

Right-click in the working area of the planning board and click on Add grand total.

Add planning mask Ctrl+Shift+M

Add group level 1

Add group level 2

Add group level 3

Add grand total ↩

#### 2 Name the grand total

Enter the name of the grand total in the first column.

Grand total name Grand total

#### 3 Select different totals

Check which totals you want to display in your planning board. Grand total is default, but you can also choose to display Accumulating grand total, Grand total evolution %, and Accumulating grand total evolution %, as well as, you can Allow input (cascade to input masks).

Grand total  Allow input (cascade to input masks)

Accumulating grand total

Grand total evolution %

Accumulating grand total evolution %

#### 4 Save grand total

When you are done, click on Ok. In the Planning board there will be created the new grand total.  
 Click on Exit configuration to close the configuration window.

Ok

Exit configuration

## Edit a Mask, Level or Grand total

### 1 Select and Edit

While in configuration mode, select the line you want to edit and then Right-click in the working area of the planning board or on the selected line and click on Edit.

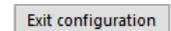
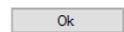


### 2 Edit the selected

Edit the opened tab.  
Check the Add Planning Mask, Add Grand total and Add groups sections in this guide to learn how to configure these.

### 3 Save

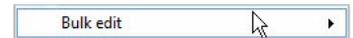
When you are done, click on Ok. In the Planning board the selected line will be edited.  
Click on Exit configuration to close the configuration window.



## Bulk edit a mask

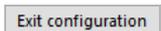
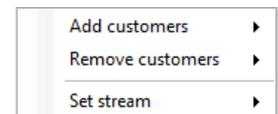
### 1 Select Mask

While in configuration mode, select the mask you want to bulk edit and then right-click in the working area of the planning board or on the selected mask and click on Bulk edit.



### 2 Bulk Edit

Assign customers, remove customers, or set stream.  
The changes are automatically saved.  
Click on Exit configuration to close the configuration window.



## Delete a Mask, Group Level or Grand total

You can delete directly a group level or grand total, but in order to delete a mask it has to contain no data. If there is data in the line of mask you want to delete, it will not be deleted until all data has been removed/deleted first.

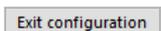
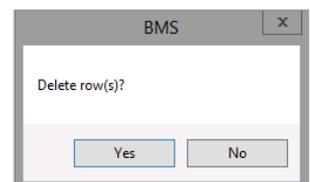
### 1 Select line

While in configuration mode, select the line you want to delete and then right-click in the working area of the planning board or on the selected line and click on Delete.



### 2 Confirm

A window will ask for confirmation of the action. Click Yes to confirm.  
The changes are automatically saved.  
Click on Exit configuration to close the configuration window.



You can multi select masks and bulk edit them.



You can multi select lines and delete them.



You can multi select lines and move them.

### Move up/down lines

#### 1 Select line

While in configuration mode, select the line you want to move and then right-click in the working area of the planning board or on the selected line and click on Move up or Move down.



#### 2 Done sorting

When you are done moving your lines, right click and select Done sorting. The changes are saved.



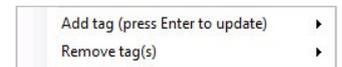
Click on Exit configuration to close the configuration window.



### Add and remove tags to masks

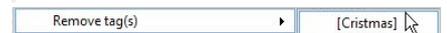
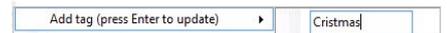
#### 1 Select line

While in configuration mode, select the line you want to add or delete a tag and then right-click in the working area of the planning board or on the selected line and click on Add tag or Remove tag.



#### 2 Define the tag and save

Write the tag and click Enter to add it, or, select a tag to remove it.



### Copy an existing planning board

When you create a new planning board, you can select to copy an existing planning board.

#### 1 Copy existing

Click Copy existing and select the planning board you want to copy in the drop-down list.

#### 2 Select structure to copy

Select whether you want the structure to be copied from the existing planning boards list. You can choose to keep the structure from the copied planning board including the headers, masks and data, only get the masks and the headers or only keep the Headers of board.

#### 3 Select time shift

Select whether you want to keep the time shift of the copied planning board or you want to change it to next year.

