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.
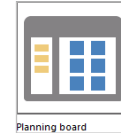
Quick guide concept

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.

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.

Create a planning board

1 **Add a new planning board**

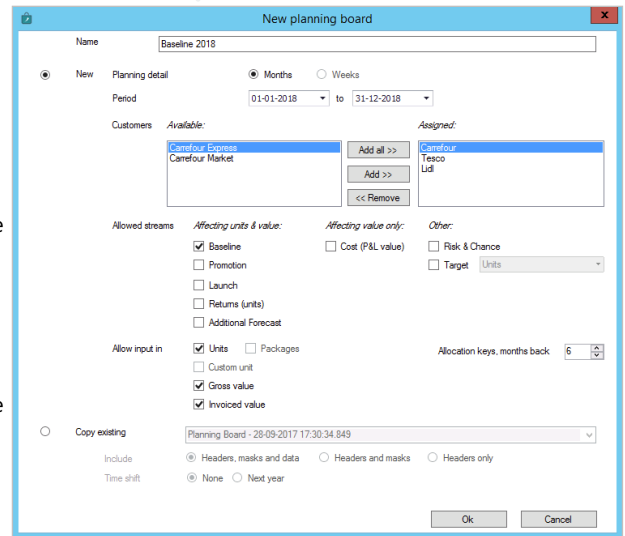Click File and New planning board.

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 abovementioned rules.
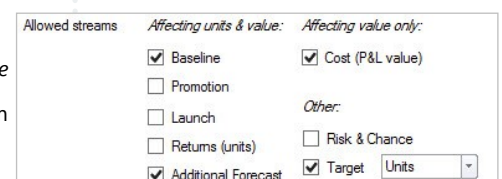
5 **Assign customer(s)**

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.
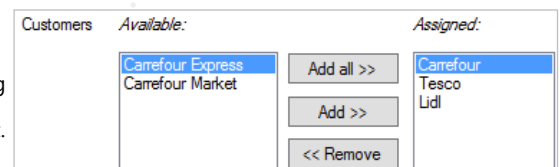
6 **Allowed streams**

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.

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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.

8 **Allocation keys period**

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

9 **Save**

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

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.
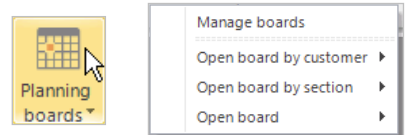
2 **Select Section**

From the list select the Section you want to open.

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.
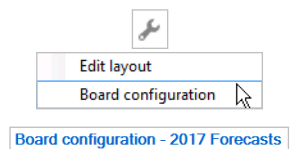
4 **Exit Board configuration**

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

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Add a planning mask

1 **Add a planning mask**

Right-click in the planning board window, and select Add planning mask.
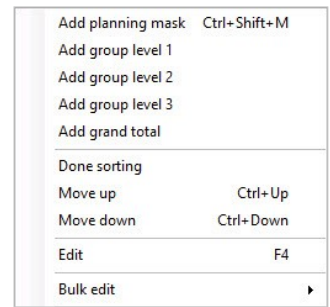
Add planning mask	Ctrl+Shift+M
Add group level 1	
Add group level 2	
Add group level 3	
Add grand total	
Done sorting	
Move up	Ctrl+Up
Move down	Ctrl+Down
Edit	F4
Bulk edit	▶

2 **Enter the name**

Enter a name for the mask.

Mask name	New mask

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 seperate scenario)
○ Promotion ○ Target
○ 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:
Carrefour Express
Carrefour Market
[Add all >>]
[Add >>]
[<< Remove]
Assigned:
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 an Excel and click Paste to add your products.

Product hierachy ● Specific products (s) - a mask will be created for each product ○ Rules
[Browse]
[Paste]

6 **Store level**

If you want you can allocate specific stores of customer for 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 only available when only one customer is assigned for the Planning mask.

Stores Leave empty if you dont want allocaiton to stores. If more stores are selected a mask for each store will be created
Store A28
[Browse]
[Paste]

7 **Save the planning mask**

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

[Ok]

[Exit configuration]

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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 and calculate the planning masks located below it. Similarly, the bottom placed group level sums 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

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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.

| Edit | F4 |
| Bulk 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.

Ok

Exit configuration

Bulk edit a mask

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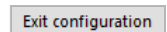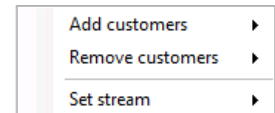You can multi select masks and bulk edit them.
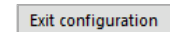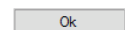
1 Select Mask

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.

Bulk edit ▶

2 Bulk Edit

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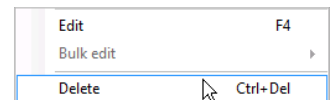Click on Exit configuration to close the configuration window.

Add customers	▶
Remove customers	▶
Set stream	▶

Exit configuration

Delete a Mask, Group Level or Grand total

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You can multi select lines and delete them.

You can delete directly a group level or grand total, but to delete a mask it has to be without any data. If there are data in the line of mask you want to delete, it will not be deleted until all the data have been removed/deleted first.
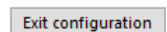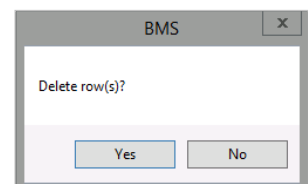
1 Select line

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.

Edit	F4
Bulk edit	▶
Delete	Ctrl+Del

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.

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Delete row(s)?

Yes   No

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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.
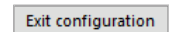
| Move up | Ctrl+Up |
| Move down | Ctrl+Down |

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.

Done sorting

Exit configuration

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.

Add tag (press Enter to update)   ▶
Remove tag(s)   ▶
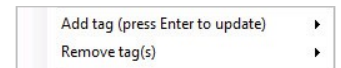
2 **Define the tag and save**

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

Add tag (press Enter to update)   ▶   Cristmas
Remove tag(s)   ▶   [Cristmas]
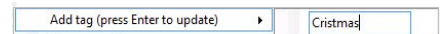
Copy an existing planning board

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.

◉ Copy existing	Baseline 2018		⌄
Include	◉ Headers, masks and data	○ Headers and masks	○ Headers only
Time shift	○ None ◉ Next year		

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