Introduction

This Quick guide will show you how to setup and work with baseline planning windows layouts.

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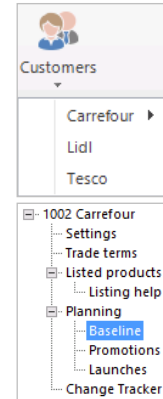
On the last page it is described how to set up the Security to activate, view and edit the described tool.

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.

Working with baseline layout

In BMS to start working with Baseline planning, first you have to set up the planning layout of the window and define the Planning Groups from the System options.

NB! When you work with the definition and the baseline planning windows set up, make sure that no other user is planning baseline or editing settings at that moment .

Edit baseline window layout

1 Open customer and select baseline

From the top navigation ribbon find *Customers* icon and click to open the list and choose the customer you want to work with baseline.
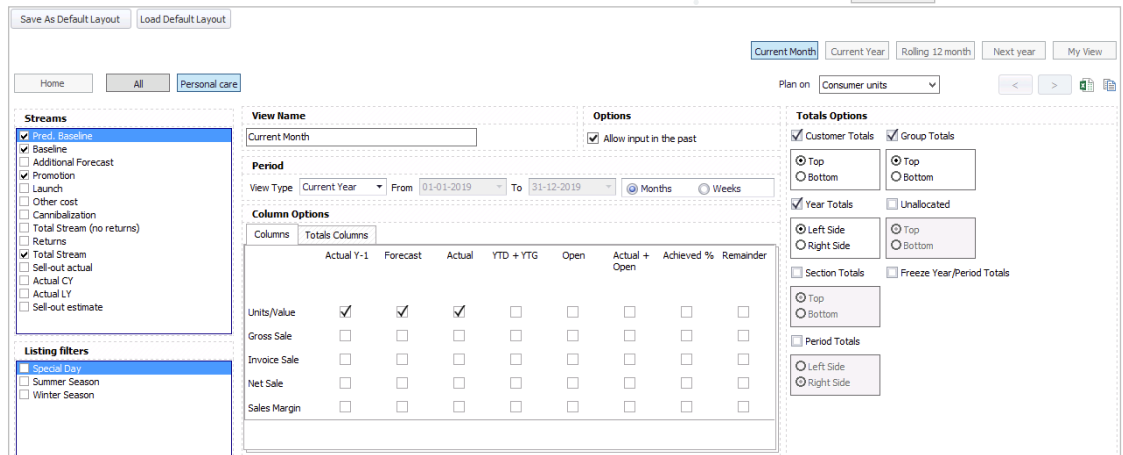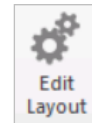
Mostly baseline planning is done on the top level customers.
In the menu to the left, find Baseline under Planning.

2 Edit layout

Click the *Edit Layout* from the top navigation ribbon to open the setup of the baseline window.

A new tab window opens.

3 Edit view name

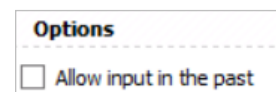In the *View Name* field you can enter the name for this specific view.

Find how to define the Views in the following pages.

4 Allow input in the past

In *Options* mark the checkbox *Allow input in the past*, if you want to allow edit in the past periods.

Recommended only when you start up the first time with baseline planning and need to add historic values.

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4 Choose planning period

In the *Period* fields you can define what time period will be displayed in this specific planning view and you can select how you will forecast your baseline - by month or by week.

If you select Months to do your planning, all the figures and values in the Baseline window will be in monthly amounts, if you select Weeks, it will be in weekly amounts.

Click on the *View Type* drop down list and select one of the predefined options, or, select *User Defined* and use the From-To dates to define the period.

5 Choose the Streams

Streams are the different options of data to display in the rows of the baseline window.

In *Streams* select the streams you want to be displayed in the specific baseline view.

To plan baseline you have to select the Baseline stream.

6 Choose columns

In Column Options you can define what you want to see in the columns of your baseline view. You can define what you want to see in main window's Columns and in the Total Columns by clicking the corresponding tab to view.

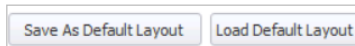To plan baseline you have to select the Forecast in Units/Value.

7 Define where to place the totals

In *Total Options* choose which totals you want to be displayed in the baseline and where you want them to be placed, on top or in the bottom of the window. Mark the checkbox to activate the option and select where to place the total.

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8   Save your layout

When you have finalized the setup of your layout, you need to save it. You have different options for this.

1. Click *Save Layout* on the ribbon to save and get back to the baseline view. The layout will be saved only for your user.

2. Click *Save As Default Layout*. This will save the layout as a default layout for the specific baseline view for future users of the system.

3. Click *Load Default Layout* to overwrite the current layout. This will use the latest default layout to overwrite the layout set up.
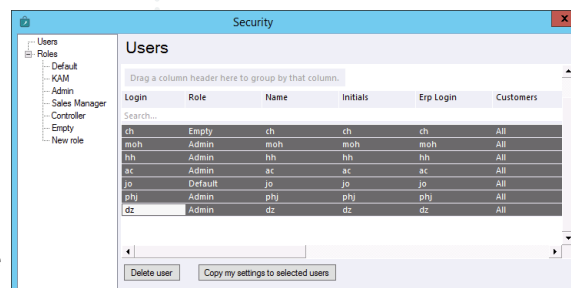

Share layout set up with other users

1   Share layout set up

If you want to share the layout set up with other users, you can do this in Security.

Save the layout as default layout (check previous section) and go to File/Security/Users. Select the user(s) you want to copy the layout set up and click the button at the bottom "Copy my settings to selected users" to share the layout as their default layout.

NB! This can be done only by the super users who have the access to security settings.

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Can I plan on SKUs?   Yes, set it up in system configuration.