

Planning Tool – Manual for Managers

This is a very brief description of the few steps that are needed to edit the forecast online inside the Planning Tool.

1. Open the Hoffmann Mineral homepage, select English as language, open [Login](#) > [Agency Portal](#) > Log in with your username (your email address) and password.

2. Open [Planning Tool Overview](#). By default, you are on page **Status**.

The status of the planning of every agency can be taken from the two columns below the header "Status." "Upload" indicates that the **Upload** button has been used at least once. If "Finished" is shown, this agency's records have been locked, the control buttons removed (Fig. 1 & 2). You should have received an email that informed you about this fact.

You may open an agency's records by clicking on its name. Depending on the status of editing by the agency (finished or not), you will see the link "**ASM Modus aktivieren**". With this mode activated, you will be able to change the data online.

3. Activate ASM ("Area Sales Manager¹") Mode by clicking on "**ASM Modus aktivieren**". Navigation is done in the same way as already described in the User Manual. On the [Input](#) page of an article either confirm the Agency's forecast figures in the rightmost column ("Correction") by pressing **Save** or do so after you made changes.

If you change data, do not forget to press **Upload**. Only then will the new data be available in Cognos. If you do not do anything, the data provided by the agency (or, if they did not make any changes, the default figures) will be imported into Cognos. You may later edit them there.

4. In [Planning Tool Overview](#), open **Article** (Fig. 3). The table displays every article that is active in Hofmann Mineral's system with forecast figures. Initially, all figures are pre-set and will be changed or confirmed during the planning period. Changes made online by an ASM and their effect on the total volume are also shown.
5. Click on [Show](#) to see which companies purchased this article and where ASM changed values (Fig. 4).
6. When you are done, click on "**ASM Modus deaktivieren**".
7. Log out.

It does not make a difference if you look at the data provided by "your agencies" – or you do not. When the time has come to import these data into the *Cognos Basisplan*, it will be done. You still can use the Cognos Tool to knock the data into shape.

Pages 2 & 3: Screenshots

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Screenshots

Planning Tool Overview

The [Status](#) table lists all distributors in alphabetical order. If a distributor does the planning for selected direct customers, they are grouped below the distributor's record, indicated by ">".

Manuals	Planning Tool Overview			
Media Pool	Year: 2014			
Newsletter	Status Article			
Photo Gallery	Distributor	Status	ASM Status	
Sample Requests	:data factory GmbH			
Personal: Template	Azienda Chimica Milanese S.r.L.			
Planning Tool Overview	> IVG Colbachini SpA			
:data factory GmbH	> Iseo Gomma S.p.A.			
Azienda Chimica Milanese S.r.L.	> Parker Hannifin Europe SRL			
	> Evercompounds S.R.L.			
	Bassermann minerals GmbH			

Fig. 1: Planning Tool Overview – Status Page

Uploading of data will create a stamp "Upload" in the left column below the header "Status", completion of planning is shown by "Finished". Activities of Area Sales Managers are indicated by the same 'stamps' further to the right-hand side. Here, the Test Agency's planning is complete.

PRATIK India	Xatico Sàrl., France				
PT United Chemicals Inter Aneka	Xatico Sàrl., BeNeLux				
	Xatico Sàrl., Spain				
Ricardo Molina S. A., West	Test Agency	Upload	Finished	Upload	Finished

Fig. 2: Status of Actions by Agency and Area Sales Manager

A click on [Article](#) opens a table which contains all currently used articles at Hoffmann Mineral. The total forecasted volume [kg] is displayed below the header "Agency", a mixture of default figures and data actively entered by the agencies. If corrections have been made by Area Sales Managers, the new total is shown in the adjacent column, followed by the difference.

Manuals	Planning Tool Overview					
Media Pool	Year: 2014					
Newsletter	Status Article					
Photo Gallery			Total	16,160,741	16,171,001	10,260
Sample Requests	Article No.	Product; bulk/bag; pallet, type; net kg/bag, bags/pallet, net kg/pallet; special	Agency	Correction	Difference	Planning Tool Urls
Personal: Template	1	61100000000 Sillitin N 85; Bulk	376.220			Show
Planning Tool Overview	2	61100010201 Sillitin N 85; Paper; Euro, exchange; 25, 39, 975				
	3	61100020202 Sillitin N 85; Paper; Euro, one-way; 25, 39, 975	1,271,750	1,283,450	11,700	Show

Fig. 3: Planning Tool Overview – Article Page

The link [Show](#) opens a list displaying all customers who are supposed to provide forecasts for this article. If corrections were made by an ASM to a company's forecast, the name of the company is shown in the section "Corrections"².

² Double for the time being; will be corrected.

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Planning Tool Overview
Year: 2014
Status | Article

Article No.	Product; bulk/bag; pallet, ty	Total	Agency
1	6110000000 Sillitin N 85; Bulk	376,220	
2	61100010201 Sillitin N 85; Paper; Euro, exch		
3	61100020202 Sillitin N 85; Paper; Euro, one	1,271,750	
4	61100030202 Sillitin N 85; Paper; Euro, one		
5	61100040202 Sillitin N 85; Paper; Euro, one		
6	61100050202 Sillitin N 85; Paper; Euro, one		
7	61100060202 Sillitin N 85; Paper; Euro, one	409,500	
8	61100080206 Sillitin N 85; Paper; Plastic, on	48,750	
9	61100090206 Sillitin N 85; Paper; Plastic, on		
10	61100100206 Sillitin N 85; Paper; Plastic, on	4,200	
11	61100110206 Sillitin N 85; Paper; Plastic, on		
12	61100120201 Sillitin N 85; Paper; neutral, E		
13	61100130202 Sillitin N 85; Paper; neutral, E	23,400	
14	61100140301 Sillitin N 85; EVA; Euro, exch		
15	61100150302 Sillitin N 85; EVA; Euro, one-w	2,187	
16	61100160301 Sillitin N 85; EVA; Euro, exchange; 10, 72, 720	5,760	

- Telko OY
- IMCD South East Europe GmbH
- Telko Group A/S, Denmark
- Azienda Chimica Milanese S.r.L
- Ditta Max Frank di Evalina Frank
- solvadis polska sp. z o.o.
- Xatco Sàrl, Spain
- DKSH Schweiz AG
- Xatco Sàrl, France
- Xatco Sàrl, BeNeLux
- Test Agency

Correction

- Test Agency

Fig. 4: These companies purchased the same article.

Clicking on a name (here: Test Agency) will open the company's records in [Matrix](#) ...

Planning Test Agency
Matrix | Summary | Input

Articles	Jan 14	Feb 14	Mar 14	Apr 14	May 14	Jun 14	Jul 14	Aug 14	Sep 14	Oct 14	Nov 14	Dec 14
61100020202 Sillitin N 85; Paper; Euro, one-way; 25, 39, 975			11,700		11,700		4,875				7,800	
61100160301 Sillitin N 85; EVA; Euro, exchange; 10, 72, 720	2,160			1,440			2,160					2,160
61200160401 Sillitin Z 86; BB1; Euro, exchange; 600, 1, 600				7,200			9,000	6,600				7,200

... from where one may move over to [Summary](#) ...

Planning Test Agency
Matrix | Summary | Input

Articles	Plan 2014	Correction Plan 2014
61100020202 Sillitin N 85; Paper; Euro, one-way; 25, 39, 975	24,375	36,075
61100160301 Sillitin N 85; EVA; Euro, exchange; 10, 72, 720	5,760	7,920
61200160401 Sillitin Z 86; BB1; Euro, exchange; 600, 1, 600	33,600	30,000
Total	63,735	73,995
Difference		10,260

... or [Input](#):

Planning Test Agency
Matrix | Summary | Input

Article No. Product; bulk/bag; pallet, type; net kg/bag, bags/pallet, net kg/pallet; special
61100020202 Sillitin N 85; Paper; Euro, one-way; 25, 39, 975

	2011	2012	2013	Forecast 2014	Correction 2014
January	7,800				
February					
March	9,750	5,850	11,700	11,700	
April					
May					11,700
June					
July	11,700	7,800	4,875	4,875	
August					
September					
October					
November	5,850	7,800		7,800	
December					
Total [kg]	35,100	21,450	16,575	24,375	36,075
Difference					11,700