

# Hoffmann Mineral Planning Tool – User Manual

*If there is more than one user working with the Planning Tool in your organization, read the last paragraph “Multiple User Access” on page 7!*

## Quick Guide

### **All a Real Manual Hater Needs to Know is on this Page**

Here is a very brief description of the few steps that are needed to complete the forecast. It is assumed that certain basic facts are known (e.g., how to handle a mouse, how to log in, how to obtain a new password, etc.).

1. Open the following URL in order to access the portal:

**<https://agency-portal.hoffmann-mineral.com>**

2. Select PLANNING, now you are on the Matrix page. Click on the first article.
3. You are now on the Input page of this article. Either confirm the default forecast figures in the rightmost column by pressing **Save** or do so after you made changes (the unit is kilogram!). If you do not expect purchasing this article from us in the coming calendar year, make sure the total reads zero before you press **Save**.
4. You are back on the Matrix page again. Repeat steps 2 and 3 until you are done with all articles.
5. If you intend to buy articles within the next calendar year which you have not purchased during the previous twelve months, open Input, select this article in the dropdown list in the section “Unused”, enter your forecast figures in the rightmost column, **Save**.
6. When you are done, press **Upload**. Wait until the computer is ready to accept input again.
7. Check if all articles are displayed in black letters and figures. If there are any red articles left, select them and do steps 3 through 6.
8. When all records are black and no longer bold, the **Finish** button should have turned dark red. If you are sure that your forecast is complete (e.g., use the total in Summary as checksum), press **Finish**.
9. Log out.

Within minutes, you should receive an email confirming the completion of the forecast.

**Thank you very much!**

Page 2: One-page Description of the Planning Tool

Pages 3 - 7: Step-by-step Reference

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<sup>1</sup> Word refers to a link, **Word** to a button.

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## **Introduction**

For years, forecast figures for articles intended to be purchased in the upcoming year have been provided by our distributors. They helped us making sales forecasts, planning production, and estimating the demand of each type of packaging.

Over time, various tools were used for this purpose: handwritten tables sent to our fax device, Word files and Excel files forwarded to us by email. Every year, towards the end of September, every Area Sales Manager evaluated the data and entered them manually into Hoffmann Mineral's computer system, most of them figure by figure, some adjusted after the data had been put in perspective.

This year, for the second time, we ask you to log-in to our Agency Portal and to enter the figures directly into the Planning Tool (purchases for resale only). It looks very much like the tables to which many of you have become accustomed: monthly sales volumes [kg] of the previous two years and the past months of the current year, article by article. This time, forecast figures were created by taking the monthly sales figures of the past twelve months. All you have to do is either to confirm or to correct them.

## **The Parts of the Tool**

When you click on "Planning" on the first screen after the Login page, you are on the Matrix page showing the header "Planning" with your company's name and two other links, Summary and Input. Matrix and Summary both contain the same list of those Hoffmann Mineral articles that were purchased by your company during the previous twelve months, combined with the monthly forecast figures as calculated by the program. Summary shows the forecasted annual volume of each article. In addition, a total is displayed here which can be useful as a checksum. Initially, Input appears to be empty.

There are three buttons available which become active (dark red) or inactive (gray) depending on the progress made. The **Save** button exists only in Input and is active whenever an article has been selected in Matrix or Summary.

In contrast to Matrix and Summary, Input contains a dropdown list which is divided in two sections: *Used* and *Unused*. Grouped under *Used* are all articles which also appear in Matrix and Summary. The entire list encompasses all articles which are active at Hoffmann Mineral at this time. Here, in section *Unused*, articles not shown in Matrix or Summary can be found, selected, and forecast figures entered.

## **How the Tool Ticks**

When you open the Planning Tool for the first time, there will be a delay of several seconds. At this point in time, all relevant data are being downloaded to the storage device on your local computer.

Select any article by clicking on its description. The Input screen opens, expecting changes or a click on **Save** to confirm the default forecast figures.

Whenever you press **Save**, old data of an article are being overwritten on your hard drive; this happens very fast. If you press **Upload**, this takes a little longer: all saved (!) changes are being transferred ("uploaded") back to the server. On one hand, you create a backup, on the other hand, somebody else can continue working on the forecast, independently from you (but not at the same time!). Finally, once the button **Finish** has become active, this indicates that every article has been saved. Clicking on **Finish** removes all buttons, setting the data to "read only." An email is sent, informing us that the forecast is ready now. Simultaneously, you and all of your registered colleagues receive a copy of this email.

## **Color Codes**

If a value in the rightmost column of the table in Input is altered, the new figure will appear in red, indicating that the change has not been saved to disk yet. **Save** will change the color of these figures to blue (saved to your local disk, but not yet to the server). Clicking on **Upload** changes the blue color to black, indicating that these data have been copied to the server ("synchronized"). Likewise, this is true for each record in Matrix and Summary.

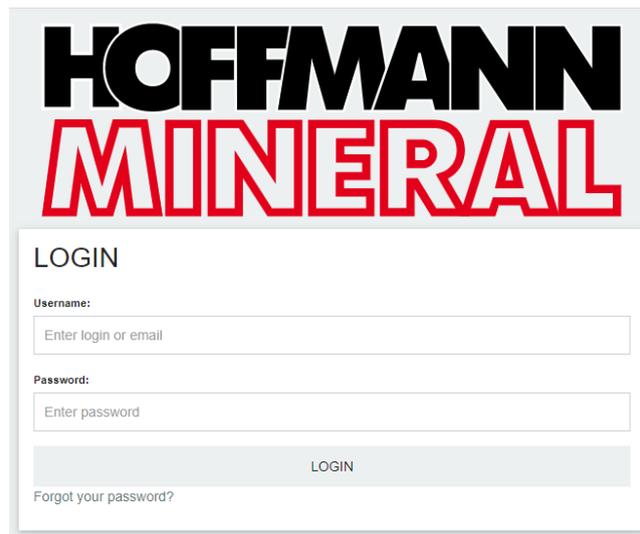
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## Step-by-step Reference

### Log-in

Open the following URL:

<https://agency-portal.hoffmann-mineral.com>

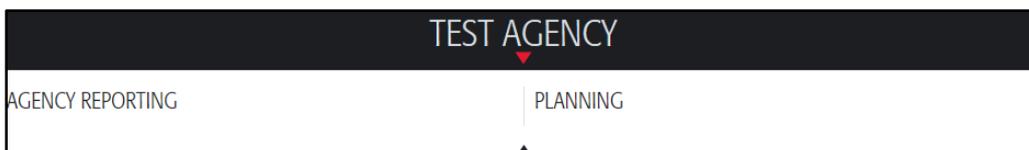


... and enter your username (usually your email address) and the password.

If your old password does not work anymore, use the “Forgot your password?” function and follow the instructions in the email that will be generated and sent to you by our server.

Inside the Portal you see a “Navigation” that contains several links. By clicking on your company’s name (here shown as “Test Agency”) you enter the area reserved for your company only.

Finally, select “Planning”:



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## Planning Environment

If you open the link [Planning](#) for the first time during the planning period, the screen displays the header with your company's name, three links ([Matrix](#), [Summary](#), [Input](#)), a table filled with default forecast figures, and two buttons which are gray (inactive) in the beginning:

PLANNING TEST AGENCY												
Customer Number: 000000000												
<a href="#">MATRIX</a>	<a href="#">SUMMARY</a>										<a href="#">INPUT</a>	
Articles	Jan 18	Feb 18	Mar 18	Apr 18	May 18	Jun 18	Jul 18	Aug 18	Sep 18	Oct 18	Nov 18	Dec 18
66080040401 Aktifit AM; BB1; Euro, exchange; 600, 1, 600			1,000			1,000			1,000			
66080070505 Aktifit AM; BB2; 100x120 IPPC; 750, 1, 750	1,000									1,500		
66020130505 Aktifit VM; BB2; 100x120 IPPC; 900, 1, 900		2,000							3,000			

Unit: kilogram [kg]  
 UPLOAD ► FINISH ►

By default, you are on the [Matrix](#) page, indicated by the word Matrix which is red underlined.

[Summary](#) shows the total amount forecasted for each article:

PLANNING TEST AGENCY	
Customer Number: 000000000	
<a href="#">MATRIX</a>	<a href="#">SUMMARY</a>
Articles	Plan 2018 [kg]
66080040401 Aktifit AM; BB1; Euro, exchange; 600, 1, 600	3,000
66080070505 Aktifit AM; BB2; 100x120 IPPC; 750, 1, 750	2,500
66020130505 Aktifit VM; BB2; 100x120 IPPC; 900, 1, 900	5,000
<b>Total [kg]</b>	<b>10,500</b>

UPLOAD ► FINISH ►

At this stage, [Input](#) appears to be empty since no article has been selected yet. There is only a box with a drop-down button ...

PLANNING TEST AGENCY	
Customer Number: 000000000	
<a href="#">MATRIX</a>	<a href="#">SUMMARY</a>
<a href="#">INPUT</a>	
Article No. Product; bulk/bag; pallet, type; net kg/bag, bags/pallet, net kg/pallet; special	
Select Article <input type="button" value="v"/>	

... which opens a list encompassing all articles sold by Hoffmann Mineral in two groups: "Used" and "Unused". If you click on one of the articles within "Used" ...

PLANNING TEST AGENCY	
Customer Number: 000000000	
<a href="#">MATRIX</a>	<a href="#">SUMMARY</a>
<a href="#">INPUT</a>	
Article No. Product; bulk/bag; pallet, type; net kg/bag, bags/pallet, net kg/pallet; special	
Select Article <input type="button" value="v"/>	
<b>Used</b>	
66080040401 Aktifit AM; BB1; Euro, exchange; 600, 1, 600	
66080070505 Aktifit AM; BB2; 100x120 IPPC; 750, 1, 750	
66020130505 Aktifit VM; BB2; 100x120 IPPC; 900, 1, 900	
<b>Unused</b>	
66080000000 Aktifit AM; Bulk	
66080050405 Aktifit AM; BB1; 100x120 IPPC; 600, 1, 600	
66080060501 Aktifit AM; BB2; Euro, exchange; 750, 1, 750	
66080090605 Aktifit AM; BB3; 100x120 IPPC; 900, 1, 900	
66080080601 Aktifit AM; BB3; Euro, exchange; 900, 1, 900	
66080160201 Aktifit AM; Paper; Euro, exchange; 25, 35, 825	
66080010201 Aktifit AM; Paper; Euro, exchange; 25, 35, 975	
66080140207 Aktifit AM; Paper; EuroHT; 25, 35, 975	
66080150302 Aktifit AM; Paper; EuroHT; 25, 35, 1125	

... a table will be displayed on this [Input](#) page, showing the purchasing pattern of this article:

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Article No.	Product; bulk/bag; pallet, type; net kg/bag, bags/pallet, net kg/pallet; special			
66020140207	Aktifit VM; Paper; EuroHT; 25, 39, 975			
	2015	2016	2017	Forecast 2018 [kg]
January			2,925	6,825
February	4,875		4,875	4,875
March	5,850			
April			2,925	3,900
May				
June			6,825	1,950
July			2,925	2,925
August				
September			8,775	2,925
October	7,800			7,800
November	6,825			6,825
December				
<b>Total [kg]</b>	<b>25,350</b>	<b>29,250</b>	<b>38,025</b>	<b>17,550</b>

Please note that the format of the each article's description is explained above the box.

A more convenient way to open and to check the figures is to open each article in [Matrix](#). Articles in bold black print contain only default figures which have not been checked and saved yet. Move the mouse cursor over one of these articles (it will become underlined) and click on it to open the input table for this article which will present the monthly sales figures of the previous 2.5 years. The rightmost column contains the default forecast figures. You may confirm by clicking on **Save** or alter them before saving.

Note that the button **Save** is already active. You could confirm this article's forecast by clicking on it, but let us assume for training's sake that you do not agree with these default figures; stock must be replenished by January and the projected September shipment must be brought forward due to Hoffmann Mineral's standstill. After correction, the table looks like this:

PLANNING TEST AGENCY				
66020130505 Aktifit VM; BB2; 100x120 IPPC; 900, 1, 900				
	2015	2016	2017	Forecast 2018 [kg]
January				1,800
February			1,800	0
March				0
April				0
May				0
June				0
July				2,700
August				0
September			2,700	0
October				0
November				0
December				0
<b>Total [kg]</b>			<b>4,500</b>	<b>4,500</b>

SAVE ►

Figures that have been changed are red. As soon as you click on **Save**, the the figures are blue. Go back to [Matrix](#):

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PLANNING TEST AGENCY												
Customer Number: 000000000												
MATRIX	SUMMARY											INPUT
Articles	Jan 18	Feb 18	Mar 18	Apr 18	May 18	Jun 18	Jul 18	Aug 18	Sep 18	Oct 18	Nov 18	Dec 18
66080040401 Aktifit AM; BB1; Euro, exchange; 600, 1, 600			500			500			1,000			
66080070505 Aktifit AM; BB2; 100x120 IPPC; 750, 1, 750	1,000									1,500		
66080060501 Aktifit AM; BB2; Euro, exchange; 750, 1, 750	1,000											
66020130505 Aktifit VM; BB2; 100x120 IPPC; 900, 1, 900	1,800						2,700					

Unit: kilogram [kg]  
 UPLOAD ► FINISH ►

Note that the just-saved record is shown with blue figures and that the **Upload** button has turned active. You may continue editing and saving records, or just press **Upload** now. Doing so will turn blue figures into black ones in normal print<sup>2</sup> and deactivate the **Upload** button.

Let's assume the default figures of the remaining two articles are ok. After opening, confirm the figures by immediately clicking on **Save**. Having done that, **Matrix** looks like this:

PLANNING TEST AGENCY												
Customer Number: 000000000												
MATRIX	SUMMARY											INPUT
Articles	Jan 18	Feb 18	Mar 18	Apr 18	May 18	Jun 18	Jul 18	Aug 18	Sep 18	Oct 18	Nov 18	Dec 18
66080040401 Aktifit AM; BB1; Euro, exchange; 600, 1, 600			500			500			1,000			
66080070505 Aktifit AM; BB2; 100x120 IPPC; 750, 1, 750	750									1,500		
66080060501 Aktifit AM; BB2; Euro, exchange; 750, 1, 750	1,000											
66020130505 Aktifit VM; BB2; 100x120 IPPC; 900, 1, 900	1,800						2,700					
61200350206 Sillitin Z 86; Paper; Plastic, one-way; 25, 21, 525	525		525			525			525			525

Unit: kilogram [kg]  
 UPLOAD ► FINISH ►

**Upload** did not become active because there has been no change after it had previously been pressed; therefore, the data on the local computer and on the server are still identical. The **Finish** button, however, changed its color because all records have either been altered and saved or confirmed (saved without changes).

Before you click on **Finish**, make sure that you took new articles into consideration – articles that were missing in the “Used” section. You may use the total in **Summary** as a checksum.

If you want to put in a forecast for an article which you have not purchased during the past years, open **Input**, select this article in the *Unused* section of the dropdown list, and enter your figures. If you purchased this article within the past 2.5 years but not in the previous twelve months, you will see the sales figures in Input; otherwise, the entire table will be empty.

When you do press **Finish**, the data will be locked and all buttons removed. An email message is sent to all interested parties (you, your colleagues who also have access to the database, and the Area Sales Manager in charge at Hoffmann Mineral).

In case you regret having pressed the **Finish** button too early, call your Area Sales Manager here at Hoffmann Mineral or send an email to [info@hoffmann-mineral.com](mailto:info@hoffmann-mineral.com), requesting reactivation of your account.

<sup>2</sup> Bold typeface means “record has not been saved or uploaded yet”; black color indicates “local data and data on server are identical”.

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>>> Important <<<

## Multiple User Access

If several users, even with own accounts (unique username and password), can access the same data, they must not work with the database at the same time!

In order not to lose data, they should agree on a certain order. When the first user is done, he should finish his work by clicking on **Upload**. Only if the next user accesses the database for the first time, no special action is required. However, if she was logged in before and had taken a look at the data, she should - first thing! – clear the cache of her browser<sup>3</sup>. Again, she finishes her work with **Upload** and informs the next person, and so on. When the last user is done with his changes, he finalizes the *Forecast* by clicking on the **Finish** button.

Finally, for safety reasons:

**Do not forget to log out!**



**Thank you very much for your kind assistance!**

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<sup>3</sup> In Internet Explorer, press Ctrl – Shift – Del while your browser is open, make sure that “Temporary Internet Files” is checked, and click on OK. Close Explorer, re-open it. If you use a different browser, check its manual or online help.