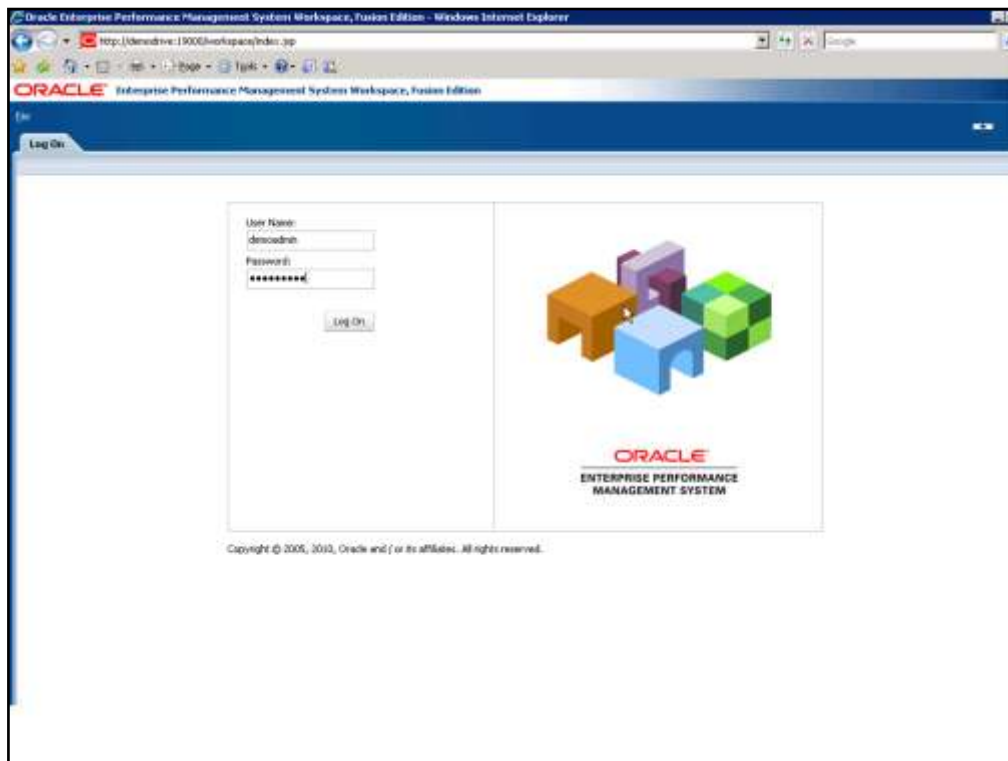
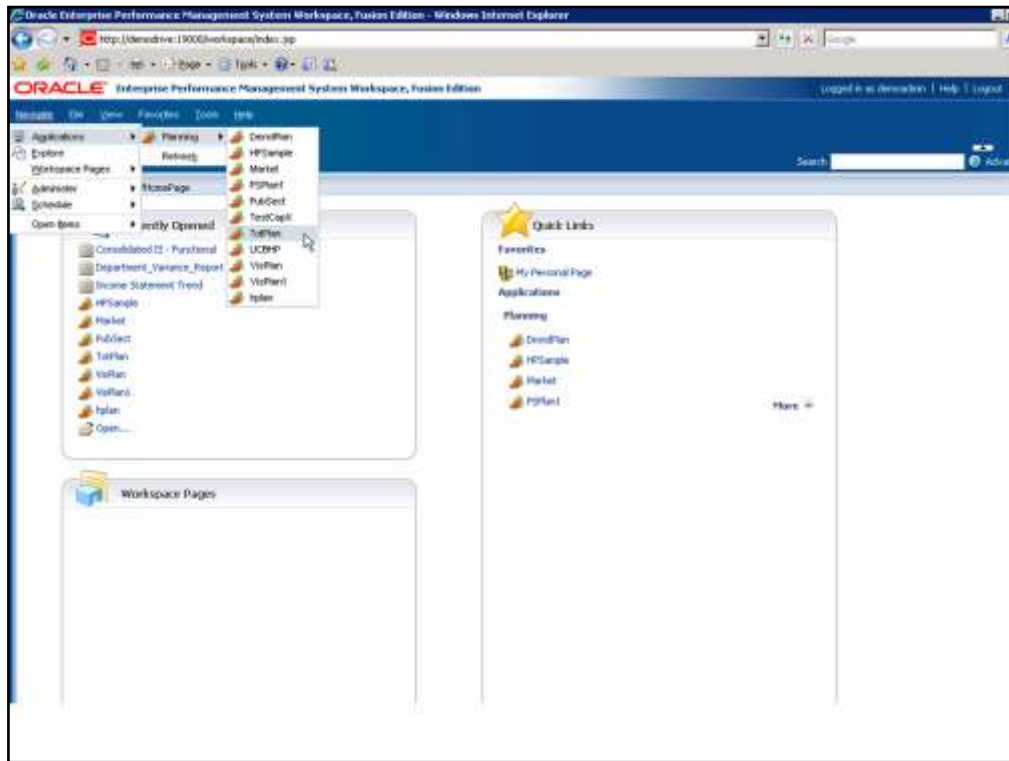


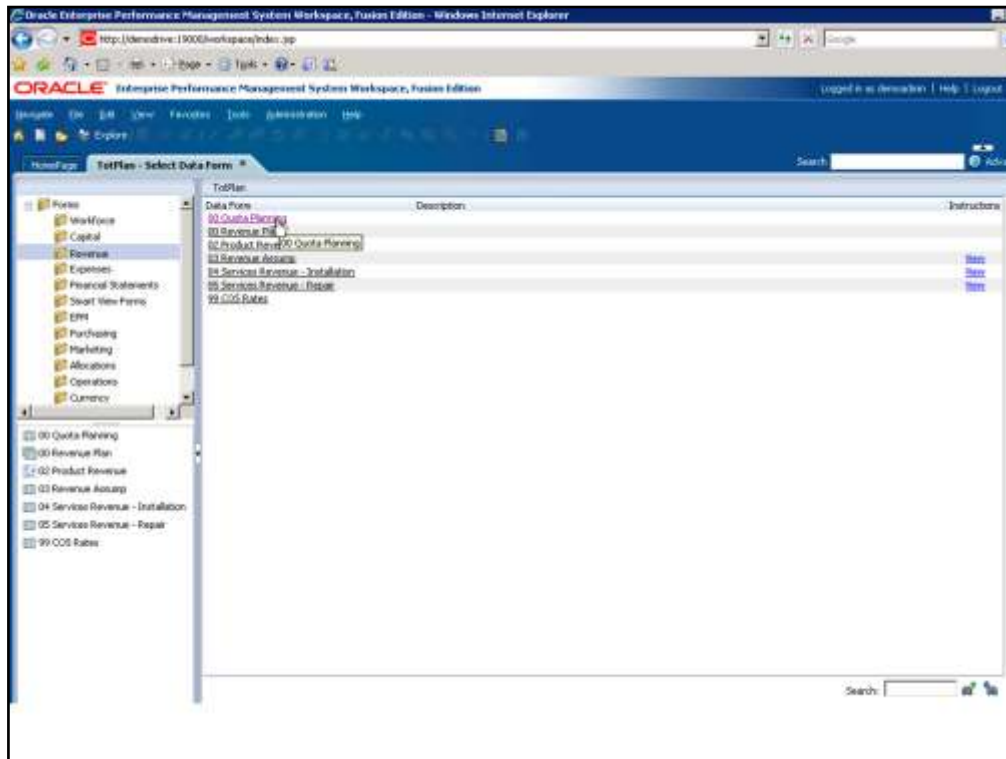
Quota Modeling Demo



Log into Workspace

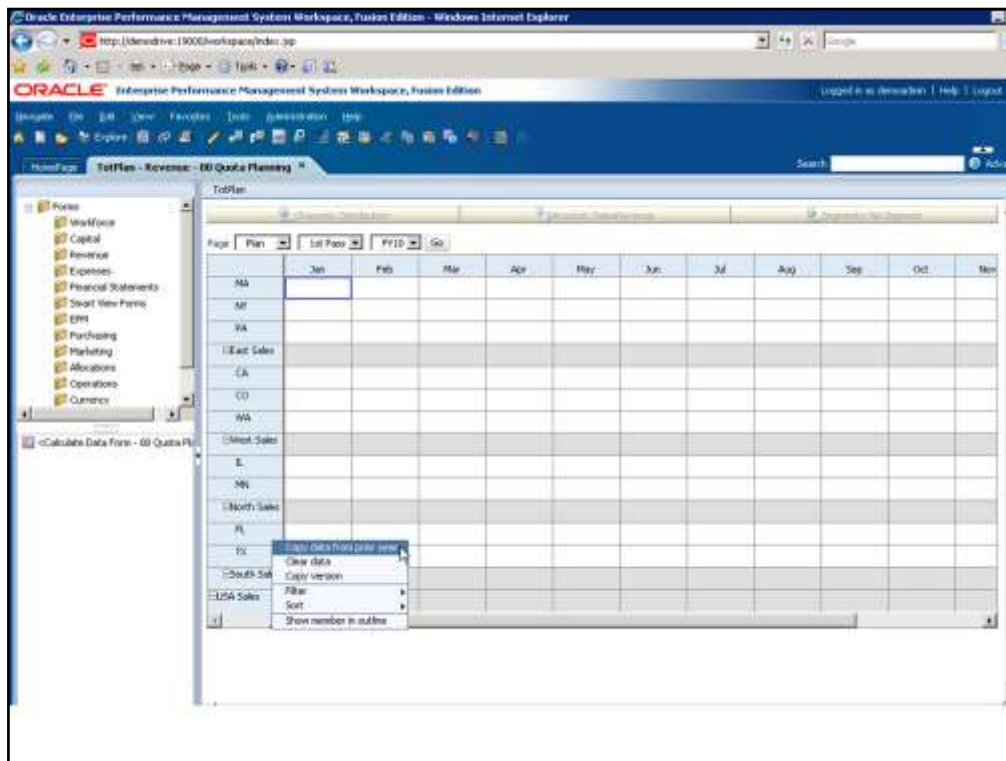


Launch the TotPlan application from Navigate > applications > Planning > TotPlan.



Click on the Quota Planning form in the Revenue folder.

As we're planning the next fiscal year, we don't yet have any data in our 1st Pass version. Let's copy last year's actual data as a starting point to next year's plan.



Right click in the blue area next to MA and select Copy data from prior year.

The goal here is to copy actual data from the prior year to the next year as a starting point.

Oracle Enterprise Performance Management System Workspace, Fusion Edition

http://localhost:19000/Workspace/index.jsp

Enterprise Performance Management System Workspace, Fusion Edition

logged in as demomian | Help | Logout

HomePage TotPlan - Revenue - EO Quota Grid Spread

TotPlan

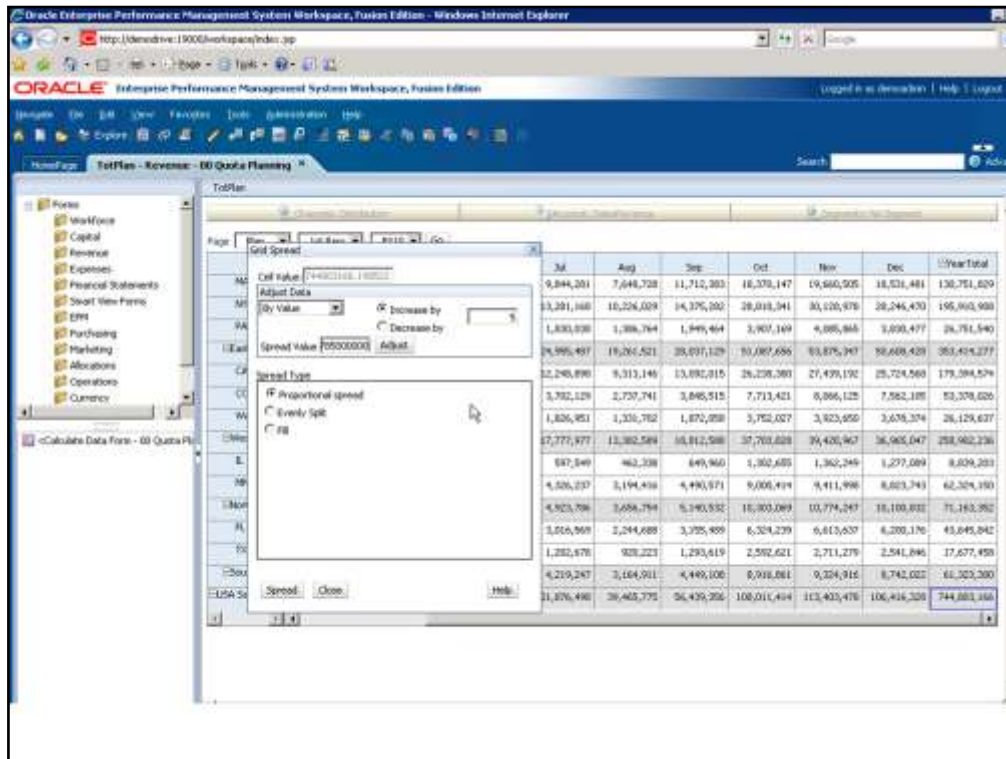
Page Plan List Rows FY10 Go

	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YearTotal
MA	505,245	5,776,059	9,362,481	9,218,160	9,844,201	7,644,728	11,712,303	16,378,147	19,560,505	18,521,481	136,751,629
MI	631,411	11,268,196	93,831,705	14,166,124	53,281,168	10,328,029	14,376,102	28,018,341	30,126,978	28,246,420	195,863,988
VA	588,959	1,952,318	1,482,512	1,944,824	1,833,938	1,388,764	1,845,464	3,807,169	4,886,865	3,000,477	28,781,540
East Sales	635,618	16,995,573	21,736,698	25,316,108	24,995,497	19,266,521	28,037,129	50,087,656	53,875,767	58,608,428	363,414,277
CA	636,880	10,309,926	9,990,236	13,050,032	12,248,898	9,312,146	13,892,815	26,238,380	27,479,192	25,724,568	179,584,574
CO	224,583	3,148,355	3,019,245	3,944,447	3,782,128	2,737,741	3,845,515	7,713,421	8,366,128	7,582,185	53,378,626
WA	586,249	1,549,667	1,490,000	1,946,362	1,826,951	1,321,762	1,872,058	3,752,027	3,823,650	3,678,374	26,129,637
West Sales	436,911	15,376,958	14,499,489	16,948,861	17,777,977	13,382,589	18,812,588	37,703,828	39,406,967	36,905,047	258,962,236
E	518,633	906,946	487,343	636,618	687,549	462,338	645,960	1,302,685	1,362,349	1,277,689	8,824,281
SN	796,796	3,669,574	3,526,388	4,668,199	4,526,237	3,194,438	4,490,571	9,008,419	9,411,998	8,603,743	62,324,190
North Sales	275,229	4,176,423	4,015,731	5,245,517	4,923,798	3,688,794	5,340,532	15,303,089	16,774,247	18,100,832	71,183,382
FL	619,291	2,938,751	2,460,259	3,213,821	3,016,969	2,244,689	3,725,489	6,324,239	6,613,637	6,200,176	43,645,842
TX	944,255	1,828,134	980,888	1,281,351	1,282,878	928,223	1,293,619	2,582,621	2,711,279	2,541,846	17,677,458
South Sales	663,546	3,578,886	3,441,147	4,495,172	4,219,247	3,164,911	4,448,106	8,918,861	9,324,916	8,742,022	61,323,200
USA Sales	101,300	39,428,032	43,673,884	53,907,969	51,376,488	38,465,775	56,439,356	108,011,414	113,403,478	106,416,328	743,808,168

FY09 actual data is now copied into our FY10 plan.

Let's assume that management wants to increase the annual target for all entities to 785 million.

Highlight the YearTotal cell for USA Sales and click the Grid Spread icon.



Enter 785000000 in the Spread Value box and click Spread.

We're able to quickly do a proportional spread of a new target across multiple hierarchies, e.g., time and department.

Oracle Enterprise Performance Management System Workspace, Fusion Edition - Windows Internet Explorer

http://devdrive19001/workspace/index.jsp

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

logged in as devdrive19001 | Help | Logout

Home Page | **TotPlan** | **Save** | **EO Quota Planning**

Search

Home Page | **TotPlan** | **Save** | **EO Quota Planning**

Page | Plan | Set Rows | FY10 | Go

	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total
MA	184,942	5,479,052	9,899,390	9,713,554	10,205,575	8,064,528	12,344,490	19,344,529	33,721,577	19,531,620	127,688,472
MI	183,758	11,873,176	11,416,290	14,913,083	13,997,949	10,777,825	15,151,112	36,365,230	31,758,331	29,770,924	206,498,169
VA	674,715	1,636,093	1,573,862	2,098,095	1,828,808	1,964,688	2,054,676	4,114,039	4,306,378	4,007,287	28,195,314
East Sales	833,615	16,995,573	21,716,498	25,316,108	24,995,497	19,264,521	29,037,129	50,007,696	63,875,797	58,669,429	383,414,277
CA	230,336	10,950,677	35,529,436	15,794,239	12,809,568	9,015,774	13,790,500	27,654,459	20,920,078	27,112,910	189,076,452
CO	380,673	5,309,639	5,182,193	4,157,328	3,901,932	2,085,498	4,056,219	8,128,752	8,501,452	7,959,230	56,250,624
WA	671,850	1,633,302	1,570,425	2,053,428	1,925,251	1,403,574	1,873,095	3,954,523	4,135,409	3,039,692	27,529,846
West Sales	436,911	15,375,958	14,499,489	16,946,861	17,777,977	13,382,589	16,812,598	37,703,638	39,406,907	38,905,047	258,962,236
E	944,834	324,239	513,645	676,936	629,798	407,293	495,838	1,072,959	1,435,770	1,344,651	8,384,252
SW	989,128	5,267,623	3,719,815	4,867,964	4,599,723	3,364,817	4,732,826	9,486,144	9,919,961	8,294,968	68,687,768
North Sales	275,229	4,176,423	4,005,731	5,245,517	4,923,796	3,658,794	5,345,532	15,303,089	13,774,247	16,100,832	71,163,282
FL	780,653	2,696,044	2,593,836	3,367,270	3,179,373	2,365,634	3,325,790	6,665,557	6,970,573	6,534,798	48,061,297
TX	180,613	1,075,191	1,033,826	1,356,525	1,267,598	988,287	1,363,435	2,732,545	2,857,606	2,679,028	18,631,586
South Sales	663,546	3,578,096	3,441,347	4,405,172	4,219,247	3,164,911	4,449,106	9,918,861	9,324,914	8,742,022	61,323,200
USA Sales	101,300	39,428,032	43,673,864	53,907,969	51,376,498	36,403,775	56,439,356	108,011,414	113,403,478	106,416,328	744,883,166

Calculate Data Form - EO Quota Planning

The data that is modified turns yellow.

Click on the Save button in order to recalculate all data.

Oracle Enterprise Performance Management System Workspace, Fusion Edition - Windows Internet Explorer

http://devdrive19000/Workspace/index.jsp

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

logged in as devdrive19000 | Help | Logout

Home Page | Explore | Favorites | Tools | Administration | Help

Home Page | **TotPlan - Revenue - EO Quota Planning** | Search | Admin

TotPlan

The data has been saved. Rule was run successfully.

Page | Run | 1st Pass | P110 | Go

	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total
MA	784,862	3,879,052	9,899,390	9,712,524	10,375,575	8,061,528	12,344,490	19,361,579	20,721,577	19,531,620	137,088,472
MI	153,759	11,873,176	11,416,290	14,912,063	13,947,949	10,777,925	15,051,112	30,365,230	31,705,931	28,730,904	206,484,349
PA	624,715	1,836,099	1,573,862	2,066,065	1,808,805	1,461,669	2,054,676	4,118,038	4,306,378	4,037,267	28,195,314
East Sales	103,435	17,495,123	22,889,742	26,682,412	26,392,329	20,303,283	29,663,286	53,844,844	56,732,886	53,298,751	372,487,954
CA	230,936	10,956,677	18,529,406	15,754,339	12,999,868	9,513,774	13,790,889	27,694,499	28,920,878	27,112,556	188,076,452
CO	389,873	3,309,839	3,382,193	4,157,328	3,901,932	2,095,496	4,056,219	8,129,712	8,501,452	7,993,230	56,258,624
WA	671,859	1,833,302	1,570,423	2,051,428	1,825,951	1,403,574	1,973,893	3,094,523	4,135,409	3,035,895	27,539,846
West Sales	270,877	15,893,817	17,082,822	19,963,095	18,737,450	14,104,844	19,827,999	39,728,694	41,056,950	38,960,041	272,875,123
IL	546,834	534,288	523,845	678,476	829,798	487,290	885,838	1,072,589	1,435,770	1,346,883	8,368,253
MN	959,138	3,967,609	3,718,815	4,892,964	4,589,723	3,368,817	4,732,926	9,486,164	9,919,961	4,299,560	68,687,769
North Sales	685,961	4,401,893	4,232,659	5,538,932	5,399,521	3,894,189	5,417,965	10,699,123	11,395,731	10,645,591	75,089,620
IL	780,653	2,896,846	2,893,628	3,387,239	3,179,373	2,365,634	3,325,790	6,668,557	6,970,573	6,534,798	46,061,397
TX	180,613	1,075,191	1,033,626	1,356,505	1,257,598	968,867	1,363,435	2,732,545	2,857,608	2,679,028	18,631,506
South Sales	861,267	3,772,037	3,626,894	4,733,775	4,446,959	3,335,721	4,689,225	9,398,181	9,828,176	9,213,827	64,632,903
USA Sales	170,700	41,298,796	46,690,080	56,912,215	54,676,259	41,595,733	59,495,374	112,043,762	119,523,834	112,158,590	705,060,000

Calculate Data Form - EO Quota Planning

Senior Management has finished setting quotas based on historical data with some uplift adjustments, and will now send this data to regional managers via Planning's process management.

Oracle Enterprise Performance Management System Workspace, Fusion Edition

logged in as demomian | Help | Logout

Tools Administration Help

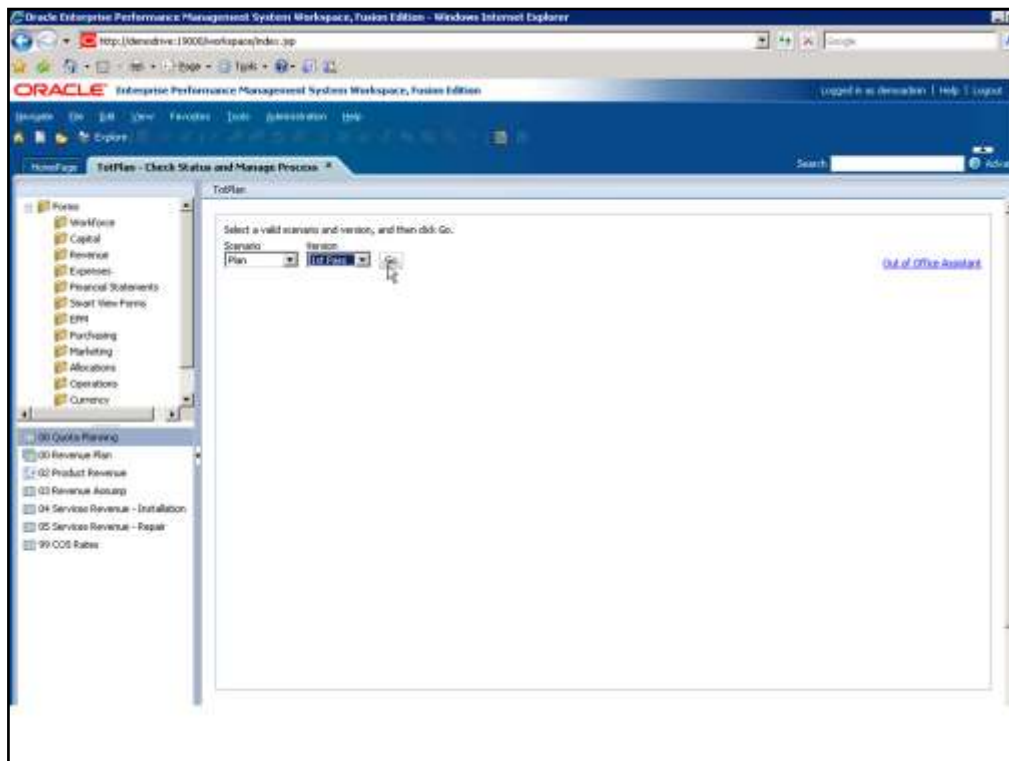
Home Page Totals - Revenue - EOC

Search

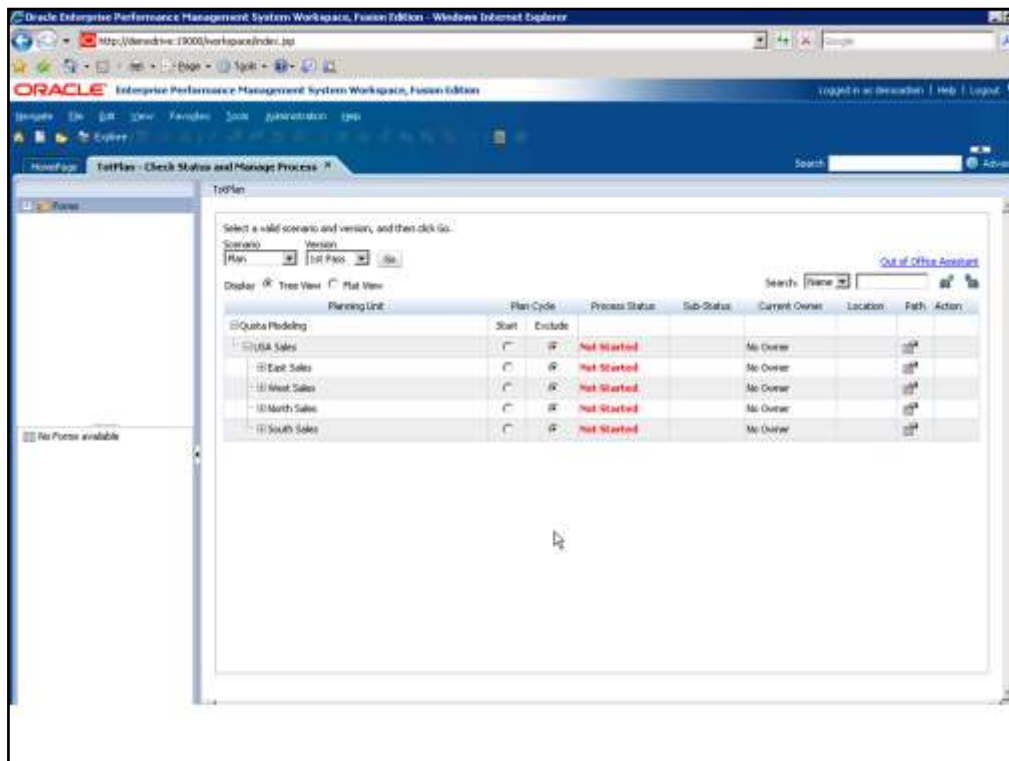
The data has been saved. Rule was run successfully.

	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total
390	9,712,524	10,375,575	8,061,528	12,344,490	19,361,579	20,721,577	19,531,620	137,088,472
290	14,912,063	13,947,949	10,777,925	15,051,112	30,365,230	31,705,931	28,770,904	206,484,349
862	2,065,065	1,909,805	1,461,608	2,054,676	4,118,038	4,336,378	4,037,267	28,195,314
East Sales	613,495	17,495,123	22,888,742	28,662,412	26,392,329	25,303,280	53,044,844	36,792,498
CA	230,936	10,956,617	33,529,406	15,754,339	12,999,868	9,513,774	13,790,888	27,694,499
CO	389,873	3,309,839	3,382,193	4,157,328	3,901,932	2,088,496	4,056,219	8,129,712
WA	671,859	1,833,302	1,570,423	2,051,428	1,825,951	1,403,574	1,973,893	3,094,523
West Sales	270,027	15,893,017	35,082,822	19,863,095	18,737,450	14,104,844	19,827,999	39,728,694
IL	546,834	534,288	523,845	678,476	829,798	487,290	885,838	1,072,569
MN	959,138	3,367,609	3,718,815	4,852,964	4,589,723	3,368,817	4,732,926	9,486,164
North Sales	695,961	4,401,823	4,232,499	5,538,932	5,399,521	3,994,189	5,417,965	10,099,123
IL	780,653	2,896,846	2,593,628	3,387,233	3,179,373	2,365,634	3,325,790	6,668,587
TX	100,613	1,075,191	1,033,626	1,356,595	1,257,598	968,867	1,362,435	2,732,545
South Sales	861,267	3,772,037	3,626,894	4,737,775	4,446,959	3,335,721	4,695,225	9,398,181
USA Sales	170,700	41,296,796	46,690,080	56,912,215	54,676,259	41,595,733	59,495,374	112,043,762

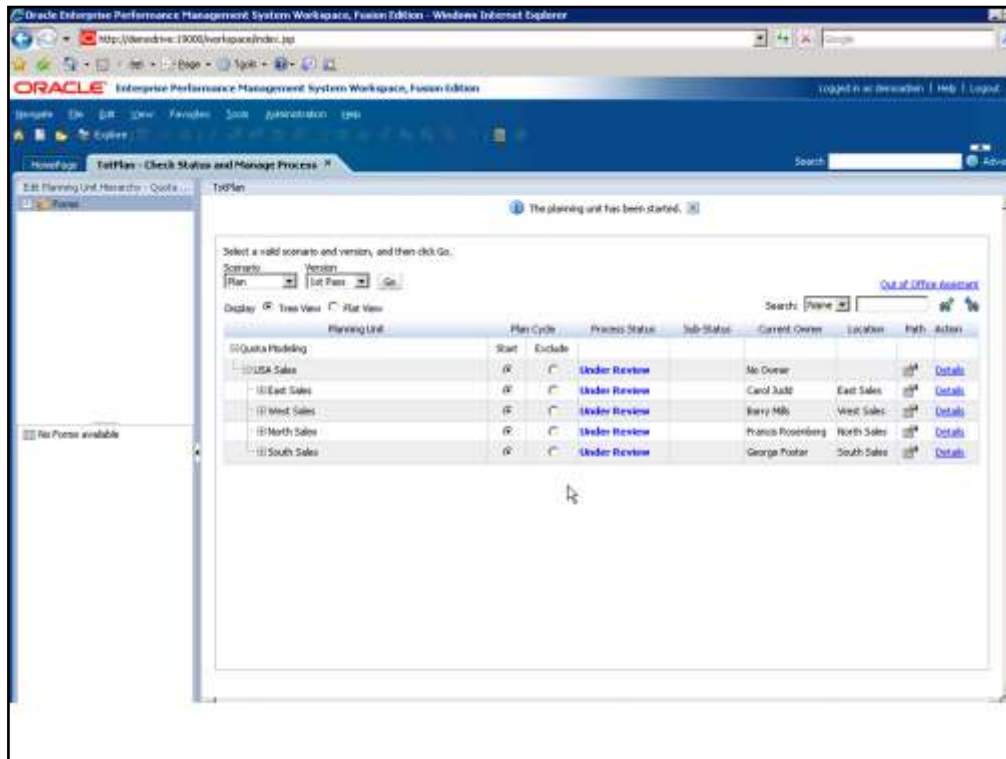
Select Tools > Manage Process.



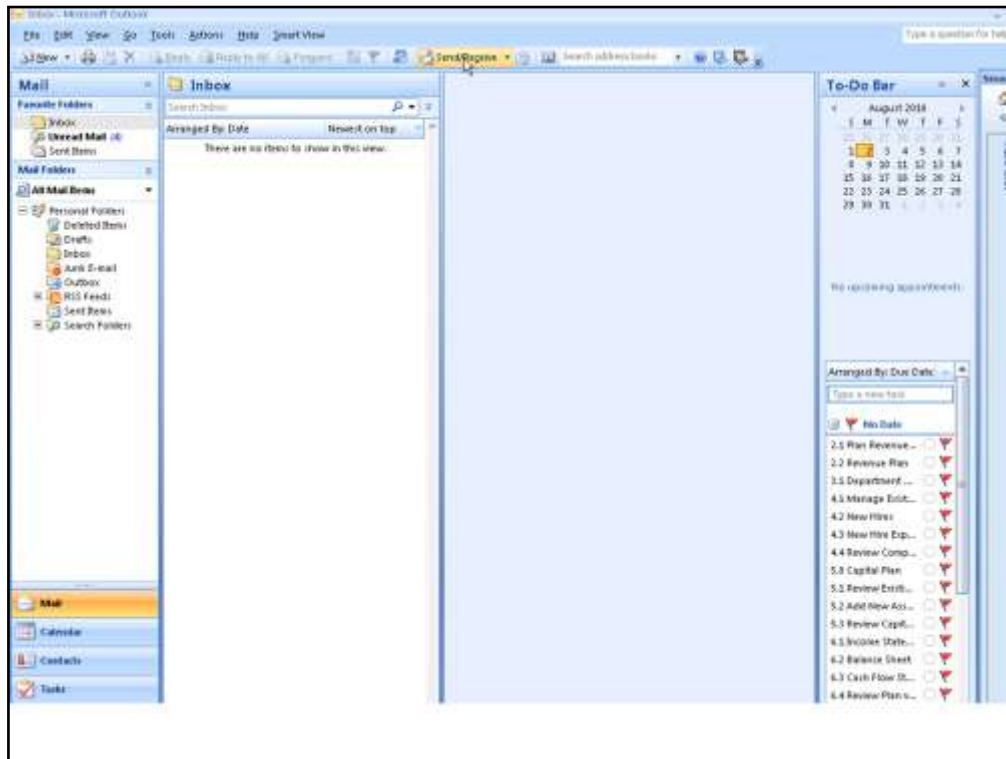
Select Plan for the Scenario and 1st Pass for the Version. Click Go.



In the Tree view, click Start for USA Sales.

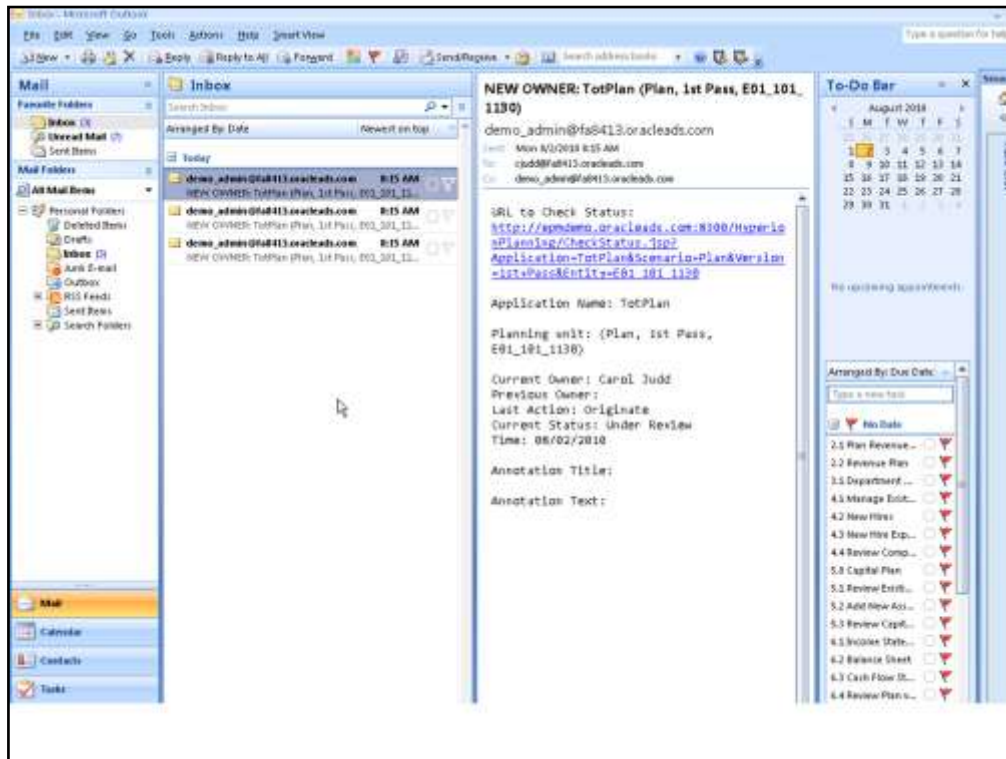


When the process is initiated, ownership automatically flows to the first person in the hierarchy. As shown here, the East Sales region is now Under Review in Carol Judd's hands.

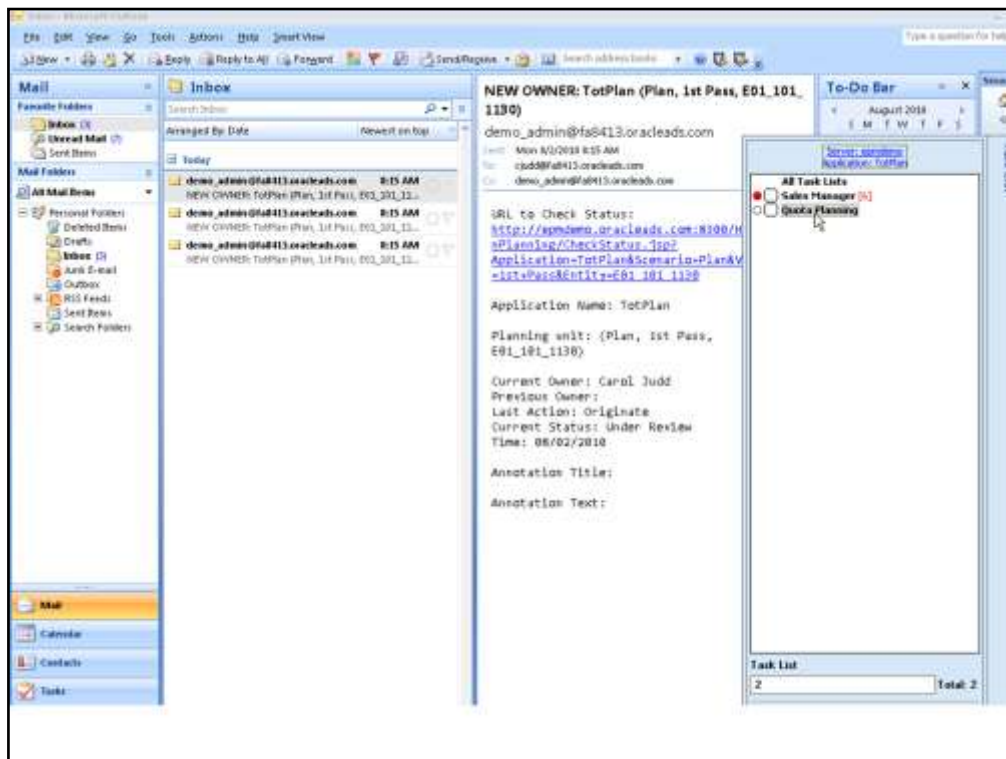


Return to Microsoft outlook. Planning is tightly integrated with Microsoft Outlook, Excel, Powerpoint and Word. When ownership of a Planning Unit changes hands, an email notification can be sent.

Click on Send/Receive.

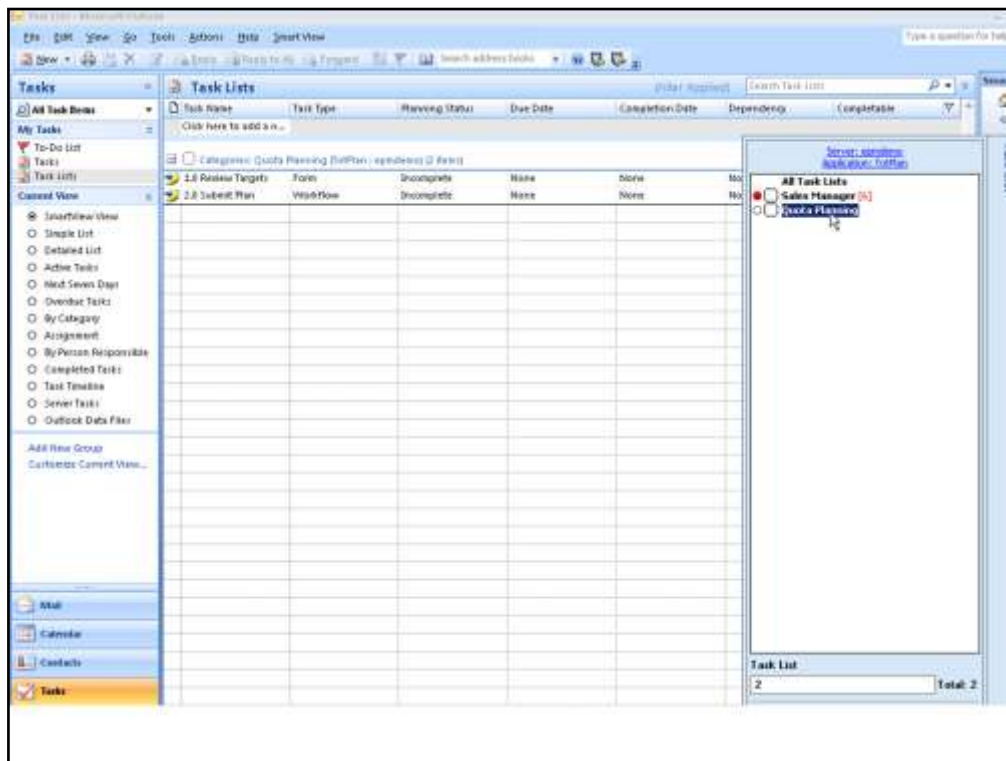


Carol has received notifications saying she's the new owner of the East Sales region plans.



Planning tasks are organized in the form of Task Lists, and these can be viewed within Microsoft.

Click on the Quota Planning Task List.



Click on Task List, then Quota Planning Task List. Double-click on the Review Targets task to open it.

Type	Form
Name	1.0 Review Targets
Dependency	0
Task Number	1.0
Status	note
View Instructions	View Instructions
Data Form	Forms/Revenue00 Quota Planning
Form type	Regular form

Tasks

You can launch a task from Outlook directly into Microsoft Excel.

Click on Open Form.

The screenshot displays the Microsoft Excel 2007 interface. The main window shows a spreadsheet titled "00 Quota Planning - spreadsheet_TotPlan...". The spreadsheet has columns for months (Jan to Nov) and rows for different regions (MA, NY, PA) and a total row (East Sales). The data is as follows:

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
MA	12,225,721	7,888,616	3,704,962	3,978,852	9,999,298	9,713,554	10,175,375	8,061,529	12,344,480	19,861,579	26,7
NY	10,961,292	10,947,681	12,153,759	11,478,176	11,416,290	14,913,869	13,957,949	10,777,925	15,151,112	20,865,228	31,7
PA	1,841,147	1,598,556	1,674,715	1,626,093	1,573,062	2,055,055	1,928,805	1,461,608	2,854,676	4,118,038	4,3
East Sales	27,428,154	20,344,854	17,533,435	17,488,121	21,993,747	26,682,432	24,382,329	20,301,063	29,350,266	53,844,844	56,7

On the right side, the "SmartView" task list pane is open. It shows a "Task List" with a "Quota Planning" task. The task list includes a "Task Details" section with a "Task List" table showing 2 tasks and a "Total: 2" value.

From here, users can navigate through their task list in an environment they are very familiar with. Close the SmartView box to gain more real estate.

File actual data: 2007, 2008, 2009 with forecast for 2010 (Compatibility Mode) - Microsoft Excel

Home | Insert | Page Layout | Formulas | Data | Review | View | Smart View | Planning | Documents Management | Oracle BE | Crystal Ball | Extended DV |

Cell Comments | Lock | Datasheet View | Manage Process |
 Supporting Details | Calculate | Submit Data | Copy Version
 Document Attachment | Adjust | More |

AD Hoc | Data | Worksheet

P010 BE Quota Planning - demo drive - TotPlan_Forecast/Revenue_1

Plan | 1X Pass | FY10 | Local | Distribution | SubRevenue | No Segment | Refresh

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YearTotal
2	MA	12,225,721	7,886,616	9,704,962	3,979,852	9,899,990	9,713,554	10,575,575	8,061,538	12,944,498	19,961,579	20,721,577	19,551,630	157,808,4
3	NY	13,361,292	10,947,561	12,153,758	11,873,176	11,416,290	14,913,609	13,997,949	10,777,925	15,151,112	30,985,228	35,755,081	29,770,934	206,484,1
4	PA	1,841,142	1,508,535	1,674,715	1,636,093	1,573,062	2,055,055	1,928,805	1,461,608	2,054,675	4,118,038	4,306,378	4,037,207	28,195,9
5	Est Sales	27,428,154	20,344,894	17,533,435	17,489,121	22,888,742	26,682,412	26,302,329	20,301,060	29,550,286	53,844,844	56,782,965	53,359,751	372,487,9
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Ready | 4 | 41 | 2010 | BE Quota Planning - 2010 | 57%

Start | Oracle Enterprise Perfor... | D:\demo\PC\Demo | Crystal Ball | Est actual data 2007... | 3:52 PM

Carol sees that her target for FY10 has been set at 372M. She’s concerned that it may be higher than can be achieved with her current resources, but she wants to analyze the data before making any sort of counter proposal.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YearTotal
MA	11,599,689	7,484,670	3,515,345	3,776,059	9,992,481	9,216,160	9,944,281	7,648,728	11,712,389	18,370,147	19,680,505	18,551,481	130,751.8
NY	12,677,111	10,387,098	11,530,411	11,265,196	10,888,805	14,150,124	13,281,168	10,226,029	14,375,282	28,810,341	30,128,978	28,348,430	135,950.9
PA	1,746,884	1,431,290	1,568,369	1,552,315	1,492,512	1,943,824	1,890,036	1,386,704	1,943,464	3,907,169	4,085,865	3,890,477	26,751.5
East Sales	26,023,664	19,303,058	16,635,615	16,399,570	21,716,698	25,316,106	24,359,487	19,261,521	28,037,129	51,087,856	53,875,347	50,608,428	353,454.2

First, she views the actual FY09 numbers for her region.

Change the POV to Actual, Final, FY09 and click Refresh.

Actual revenue was 353M; a new goal of about 20M more for her region seems high.

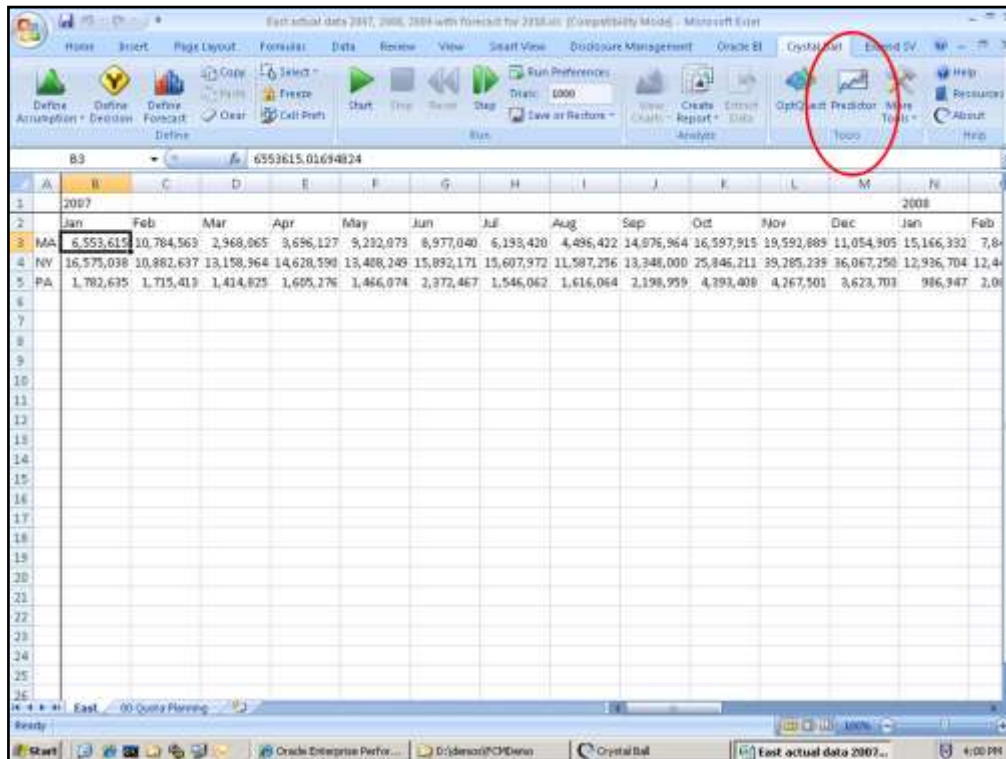
Before agreeing to the new target for next year, Carol wants to do some additional analysis to understand what the likelihood is of her achieving the target.

If, as she suspects, the new target might be too high for the resources currently available, she wants to know

- 1) What is the probability that, given her current resources, she can achieve a target of 372M
- 2) If 372M is too high, what is a more reasonable objective to offer as a counter-proposal.
- 3) Can she back up her hunch with a rigorous analysis.

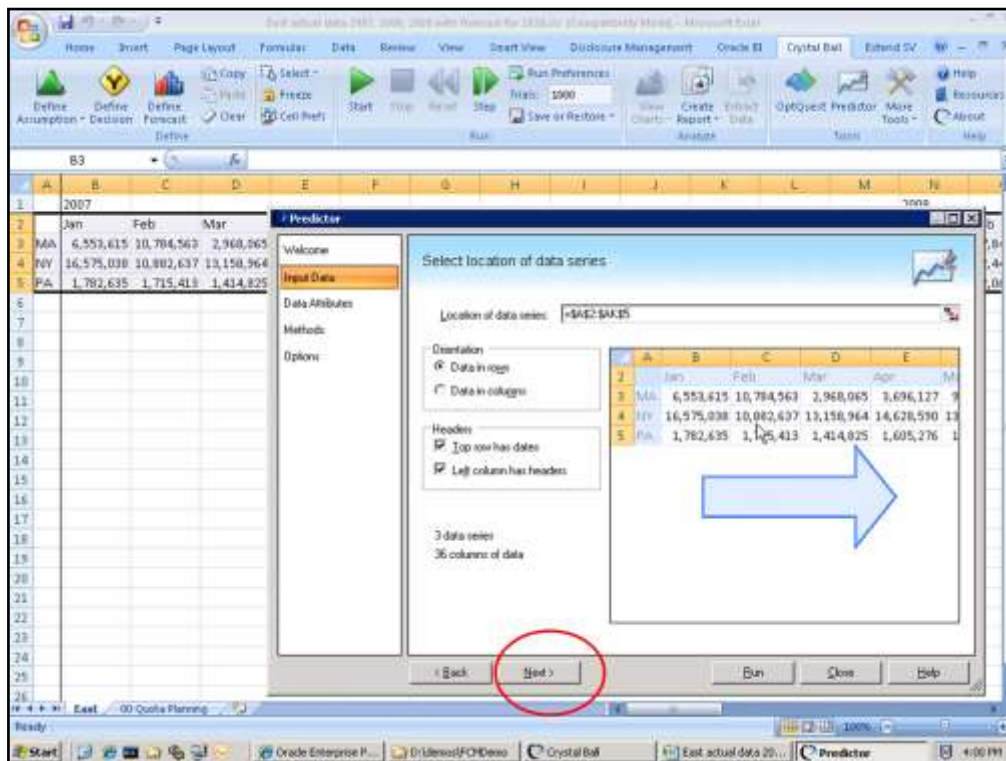
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	-YearTotal
MA	12,228,721	7,888,616	3,704,962	3,979,852	9,099,390	9,713,554	10,975,575	8,061,528	12,384,498	19,361,579	20,722,577	19,530,620	137,808,4
NY	13,361,292	10,947,681	12,153,758	11,873,176	11,416,290	14,913,809	13,997,949	10,777,925	15,151,112	30,305,228	35,755,031	29,770,924	206,484,1
PA	1,941,142	1,500,536	1,674,715	1,636,093	1,573,062	2,055,055	1,928,005	1,461,808	2,054,676	4,118,038	4,306,376	4,037,207	26,195,9
East Sales	27,428,154	20,344,834	17,533,435	17,489,121	22,888,742	26,682,412	26,902,329	20,301,060	29,550,286	53,844,944	55,782,986	53,338,751	372,487,9

Reset the form to Plan, 1st Pass, FY10 and Refresh. Go to the tab called East. Once there, click the Crystal Ball tab in the top Excel Ribbon to bring up the Crystal Ball ribbon menu.



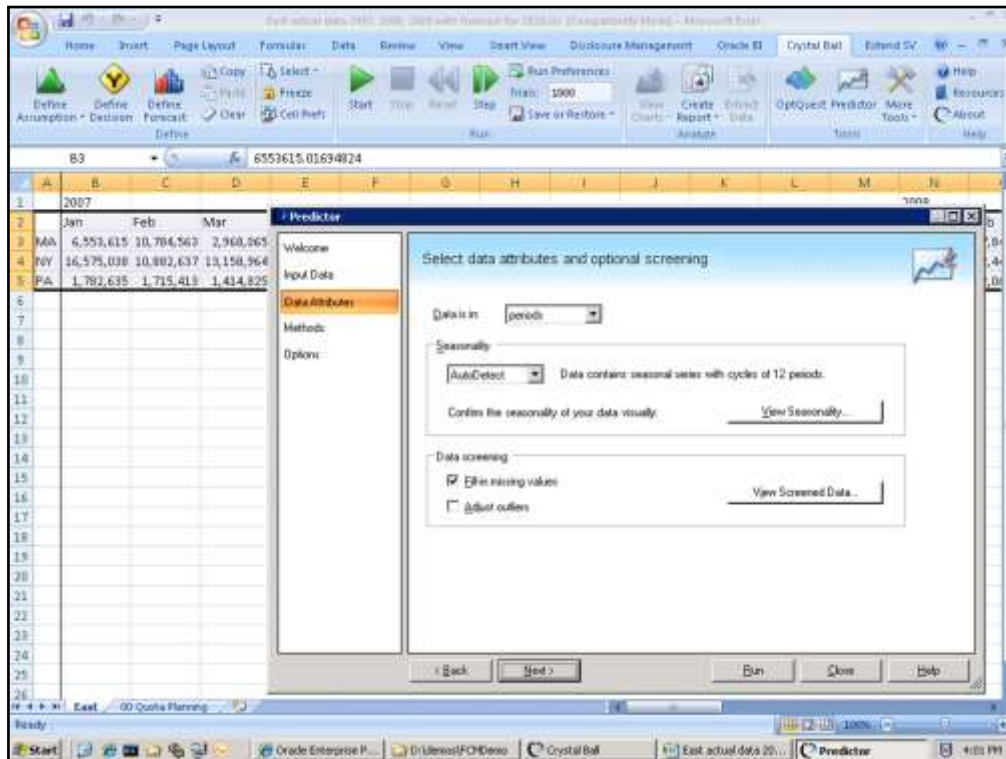
She wants to start by using the last 3 years of actual data for her region to forecast next year.

(Click anywhere within the data series, then click the Predictor icon. It will bring up this first screen in the Predictor wizard. Click next.)

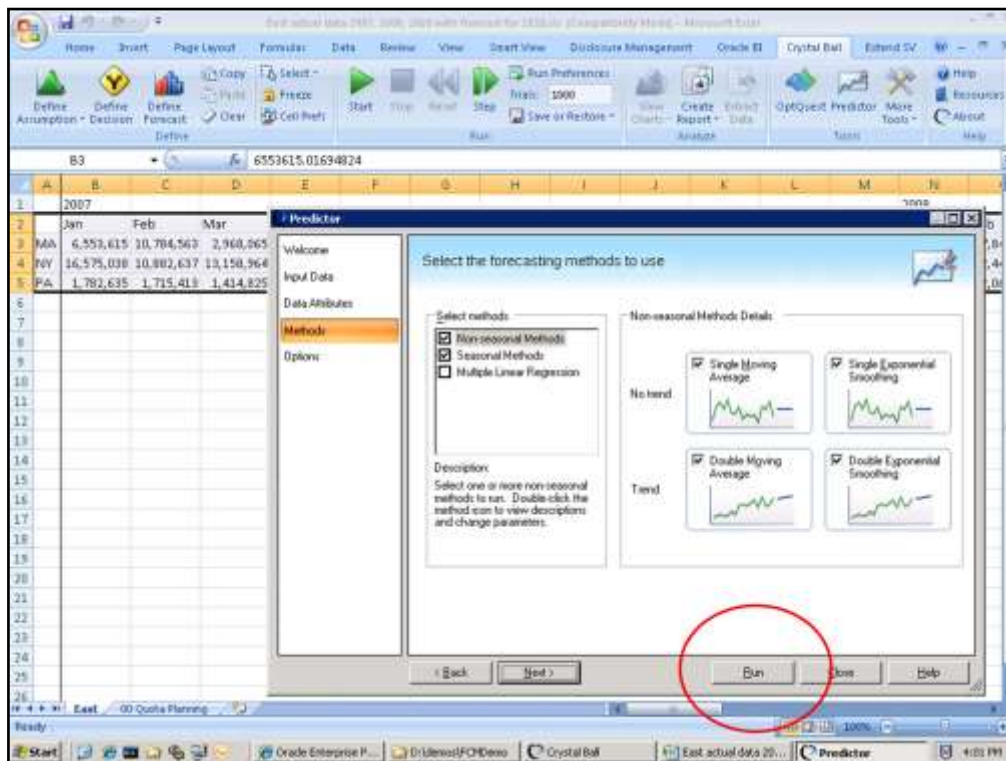


She uses Predictor, a time-series forecasting tool. Predictor automatically detects the range of values as well as the column and row headers. This tool will analyze the past three years of historical data for Carol's region and, using several time-series forecasting techniques or methods, will choose the best forecast for the next 12 months, accounting for the variability in the historical data.

(Click next.)

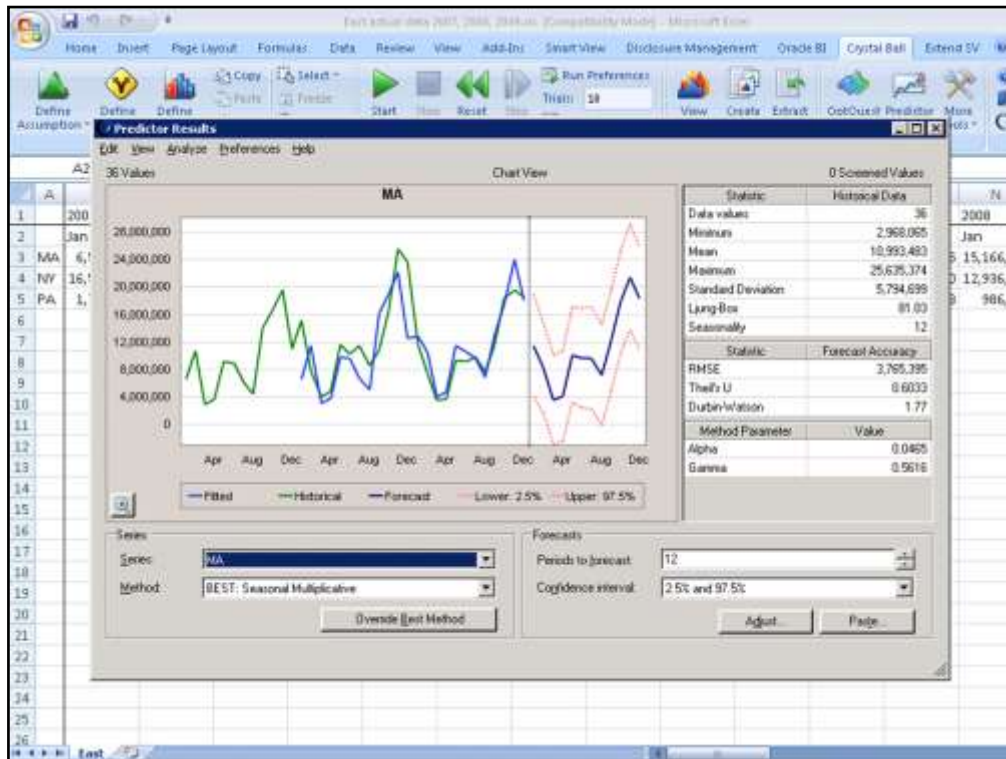


The software lets you adjust several forecasting parameters including seasonality, filling in missing values and adjusting outliers.
(click next)



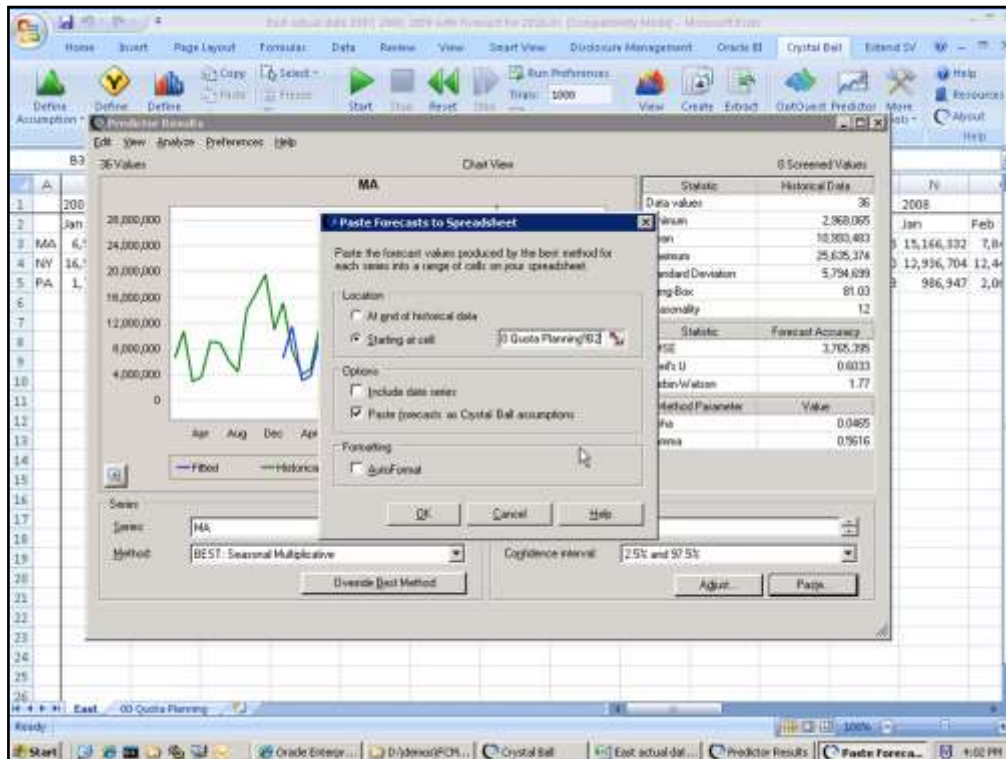
Predictor has 8 time-series methods and will automatically select the one that provides the best fit to the data.

Click run



Predictor results are shown in a chart. The left side of the chart in green is the historical data. The blue line on the left shows the results of the best method that fits the historical data. On the right side, the line in blue is the forecast data, bounded by a confidence interval (the red dotted lines).

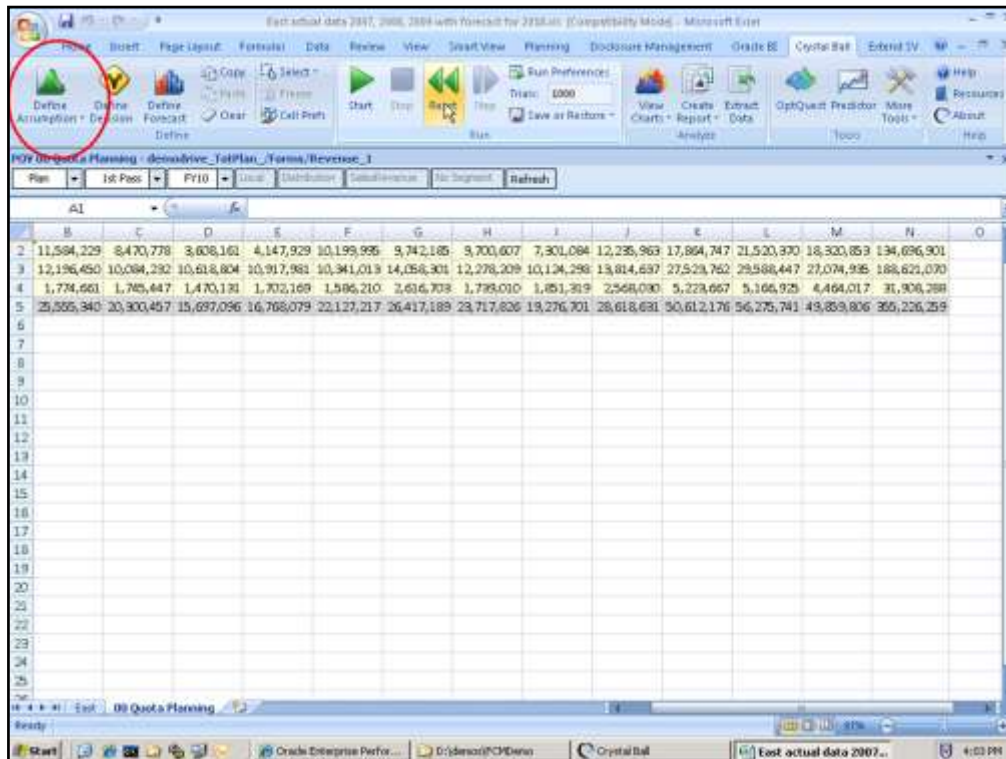
This is important because the forecast is not just giving one number, which is likely to be wrong, but rather is showing the range of possible outcomes.



Click Paste and choose the settings as shown. This will paste the forecast for the next 12 periods as well as the confidence interval into the spreadsheet.

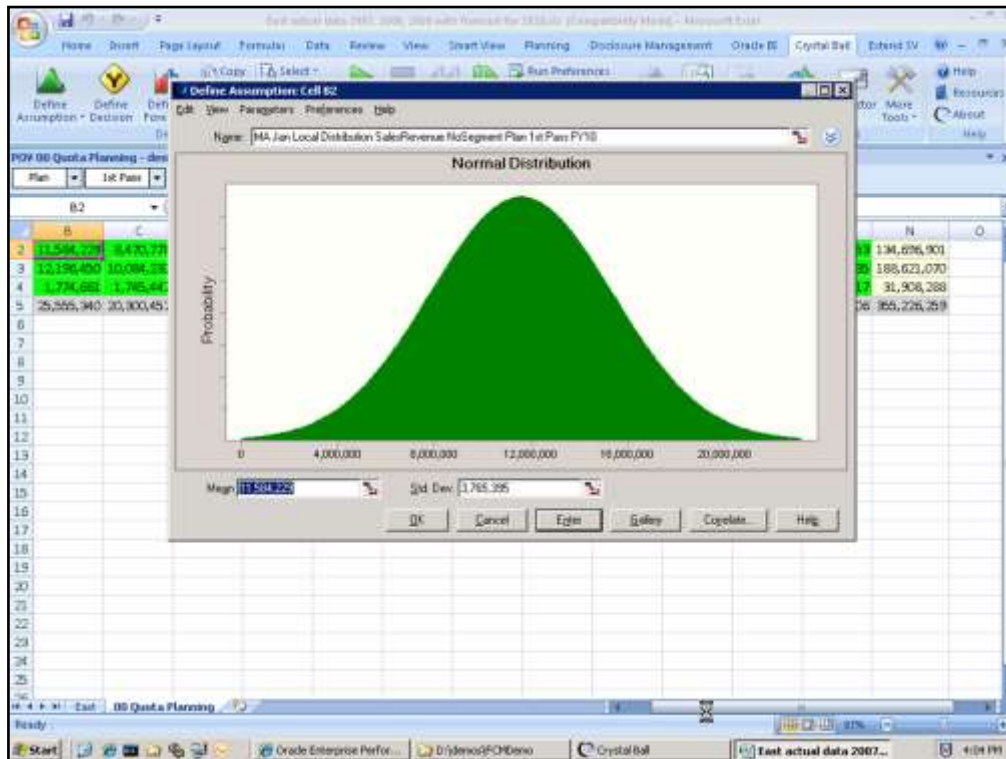
To choose the correct starting cell, click the cell picker (the black/red/white icon), then go to the Quota Planning tab and click cell B2.

Once the numbers are pasted, close the chart (click the X in the upper right corner).



Go to the Planning tab. You'll see that the values in the cells have changed. They have been replaced with Crystal Ball assumptions.

Click Define Assumption to view an assumption



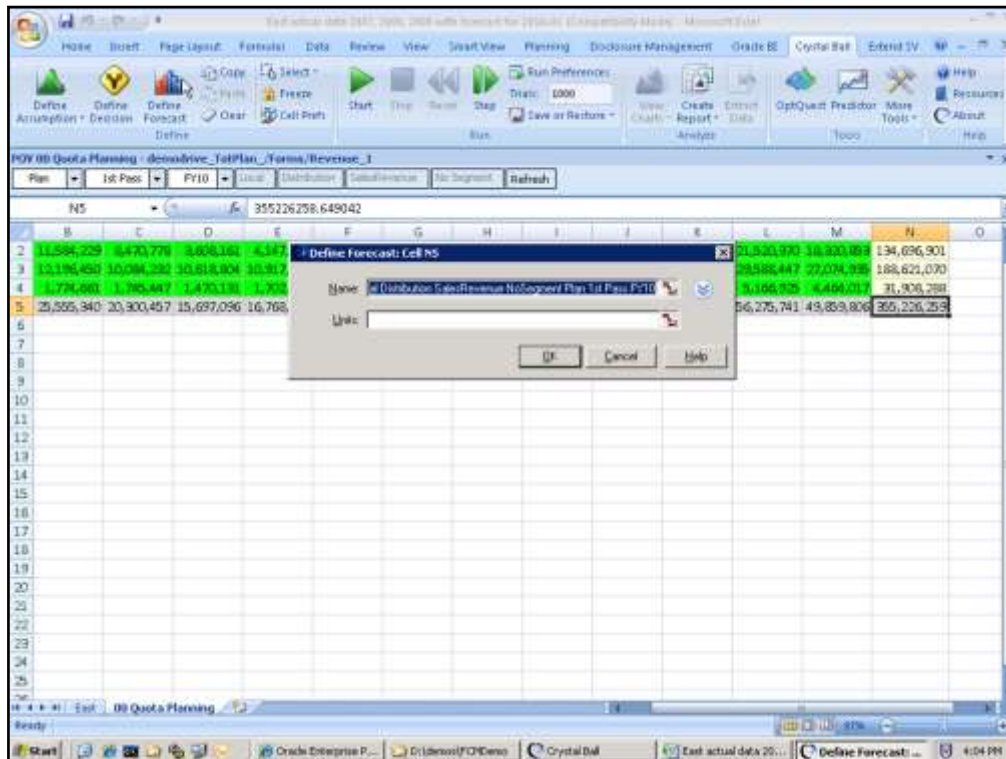
Predictor shows that given historical data, the likely value for next year should be around 355M (the total in cell N5). Yet our target is 372, much higher. Carol now needs to evaluate the likelihood of reaching a revenue target of 382. If the probability of success is too low – i.e. it's too risky – then she can choose a more conservative target and suggest that instead.

First, we look at what Predictor has provided as the output. For each month in our forecast, we've replaced the single value with a range of possible values. This says that for January, we should expect to do about 11.5M, but there could be quite a wide range of possibilities.

Each of the green cells similarly contains such an assumption. We're going to use these assumptions to answer our first question:

-What is the probability that, given her current resources, she can achieve a target of 372M

-(click cancel to close the Assumption window)



To determine the likelihood of reaching a revenue target of 372, we're going to use a statistical technique called Monte Carlo simulation. This technique uses the variability that we can predict around the model inputs to forecast a full range of possible outcomes. From this forecast, the software will compute the required probabilities.

(Click on cell N5 and click Define Forecast.)

Here we're simply telling the software which output to track. (Click OK to close the Define Forecast window).

Exit actual data 2007, 2008, 2009 with forecast for 2010 only (Compatibility Mode) - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Start View Planning Disclosure Management Oracle BI Crystal Ball Extend TV

Define Assumption Define Decision Define Forecast Define Select Freeze Start Stop Reset Step Run Run Preferences Run: 1000 View Chart Create Report Edit Data OptQuest Predictor More Tools Help Resources

POW 00 Quota Planning - DemoDrive_TotPlan_Forecast_Revenue_1

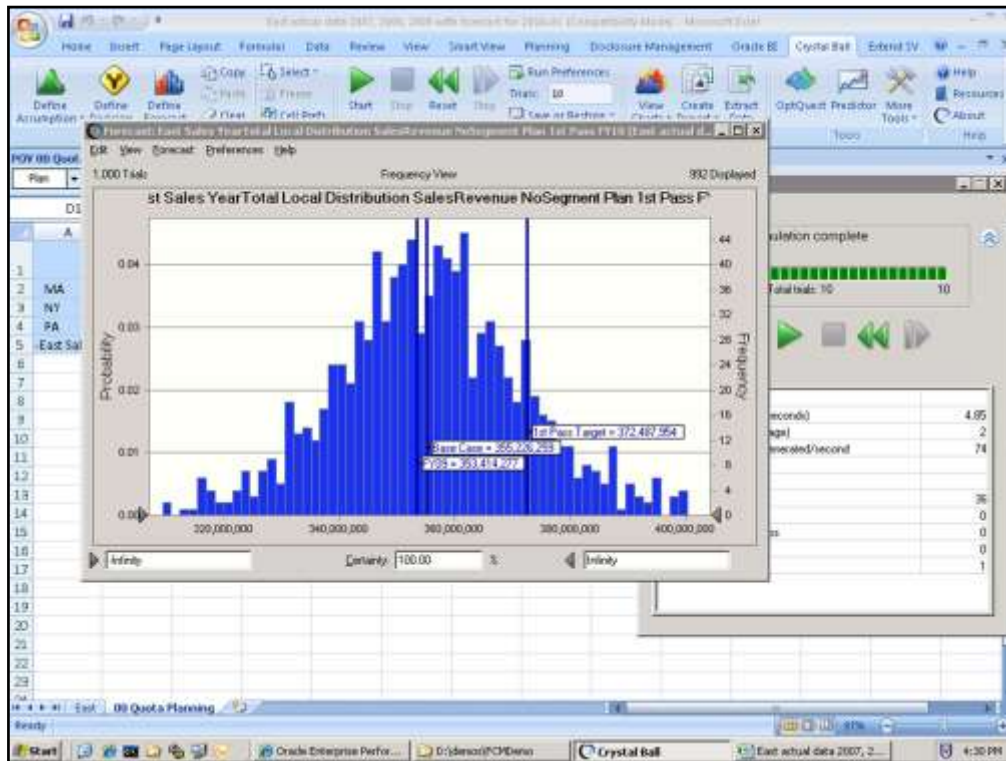
Plan 1st Pass PY10 Local Distribution Select Revenue No Segment Refresh

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	-YearTotal
2	MA	11,596,729	8,470,778	9,806,181	4,147,929	10,198,995	8,742,185	9,305,807	7,801,098	12,395,969	17,884,747	21,530,970	18,901,851	134,696,9
3	NY	12,196,450	10,084,282	10,618,804	10,917,941	10,941,018	14,058,901	12,276,209	10,154,298	13,814,637	27,529,762	29,948,447	27,074,935	188,621,0
4	PA	1,776,661	1,745,447	1,435,131	1,702,189	1,546,210	2,614,709	1,799,010	1,861,819	2,588,090	5,303,667	5,166,925	4,464,017	31,906,2
5	-Est Sales	25,555,340	20,300,457	15,697,095	16,768,079	22,127,217	26,417,189	23,717,826	19,276,701	26,618,631	50,612,175	56,775,741	43,855,806	255,226,2
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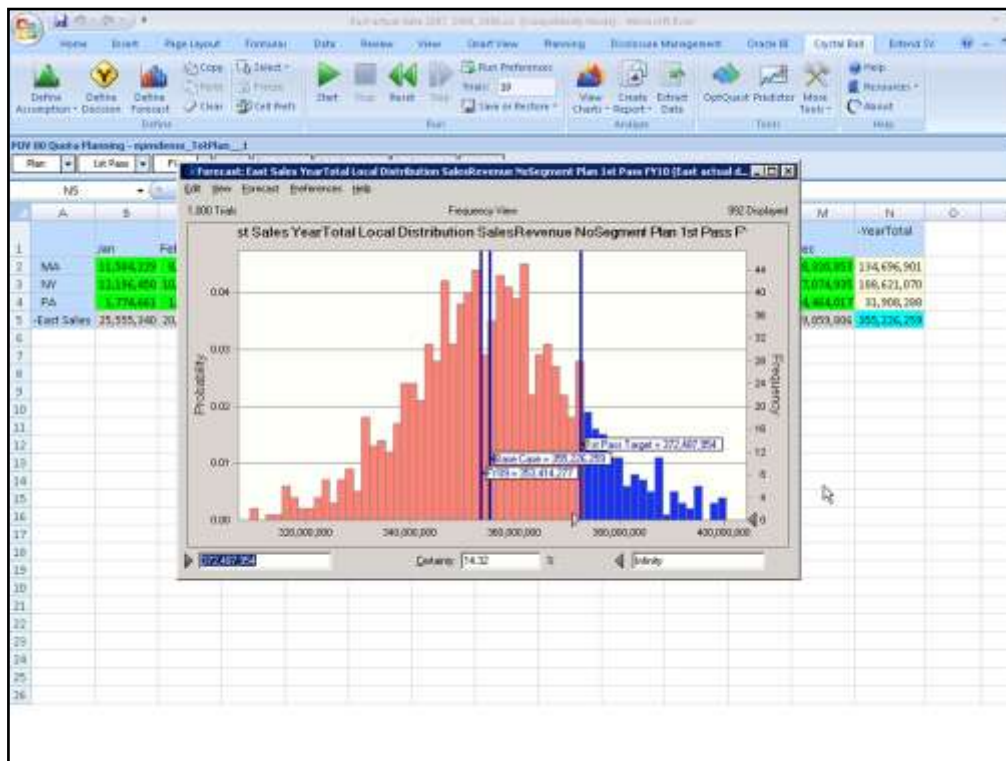
Start Oracle Enterprise Perfor D:\demo\FCHDemo Crystal Ball Task actual data 2007... 4:05 PM

The cell will turn blue. Click the green start button



At the end of the simulation the completed forecast chart will open. This chart also shows the base case (what we expect given historical data), last year's actual revenue and next year's target.

Let's answer our question: What's the likelihood of Carol achieving her target



Type the number 372,487,954 in the bottom left box and hit enter. Most of the chart will turn red. You can read the probability of achieving her target in the certainty box: 14%.

As suspected, a low probability of achieving that target. Carol would like to suggest a more achievable goal and decides to choose the base case of \$355M, which she has about a 50% chance of hitting.

Carol has now answered her first two questions:

- 1) What is the probability that, given her current resources, she can achieve a target of 372M – answer: only 14%
- 2) If 372M is too high, what is a more reasonable objective to offer as a counter-proposal.: answer about \$355M is a more reasonable amount with a 50% chance of meeting or exceeding that goal. Not a sure thing, but achievable.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YearTotal
MA	11,584,229	8,435,778	9,806,181	4,147,929	10,198,995	8,742,185	8,905,837	7,301,094	12,295,763	17,864,747	21,530,305	18,320,853	134,696,9
NY	12,196,480	10,046,292	10,818,804	10,917,981	10,341,013	14,058,301	12,276,309	10,134,296	13,884,617	22,528,762	29,546,447	27,074,395	188,621,0
PA	1,776,656	1,745,447	1,430,131	2,753,189	1,298,250	2,616,209	1,739,010	1,451,819	2,598,030	3,228,667	3,166,329	4,464,017	31,908,2
East Sales	25,555,360	20,800,457	15,697,096	16,768,079	22,127,217	26,417,189	23,717,826	19,276,701	28,688,631	50,612,176	56,275,741	49,859,806	305,230,230

Carol submits her results to Planning

Click submit data.

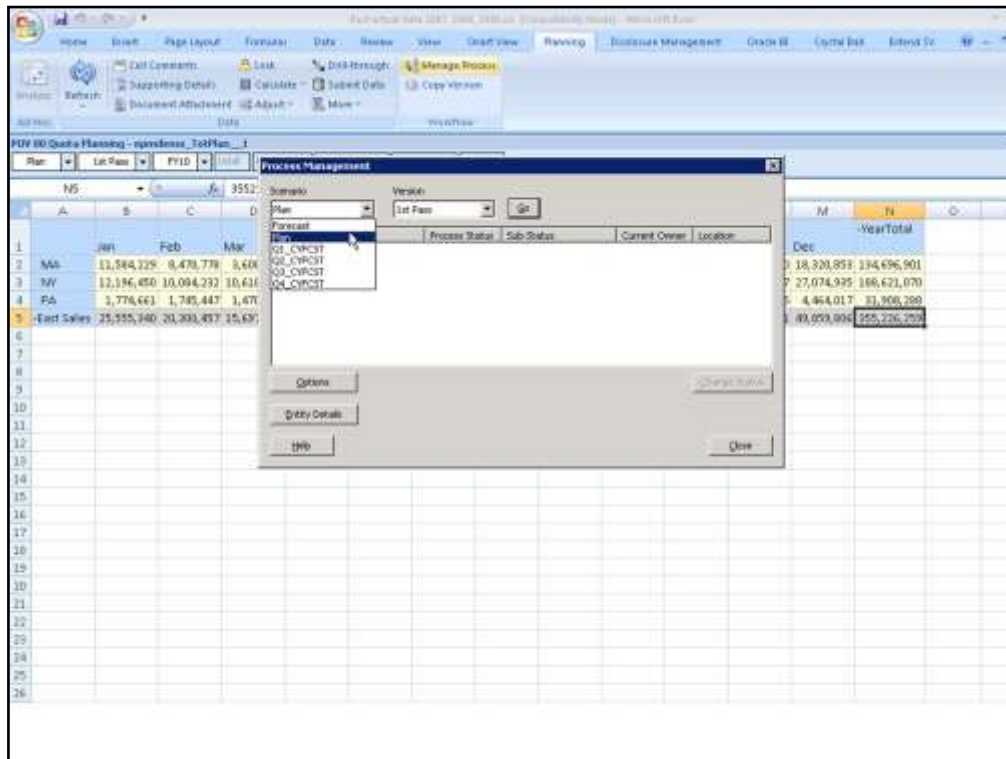
Carol also decides to save her spreadsheet so that she has a strong analytical case to back up her recommendation.

The screenshot shows the Microsoft Excel interface with the 'Manage Process' button highlighted in the ribbon. The spreadsheet displays the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	-YearTotal		
1	MA	12,584,229	8,479,778	8,608,163	4,147,929	10,199,995	9,742,185	9,709,697	7,201,084	12,235,969	17,064,747	21,520,370	18,920,859	134,696,901		
2	MW	12,194,450	10,094,232	10,618,604	10,917,981	10,941,013	14,956,103	12,278,209	10,124,296	13,014,677	27,523,762	29,588,447	27,074,935	168,621,070		
3	PA	1,776,643	1,740,447	1,670,131	1,792,149	1,506,210	2,616,700	1,799,010	1,851,319	2,548,038	5,223,667	5,166,925	4,464,017	31,908,288		
4	-East Sales	25,555,140	20,303,457	20,697,096	14,768,079	22,127,217	26,407,189	23,717,026	18,276,701	28,618,630	50,612,176	56,255,741	49,950,894	255,226,259		

Carol will now submit her plan to senior management.

Click Manage Process.

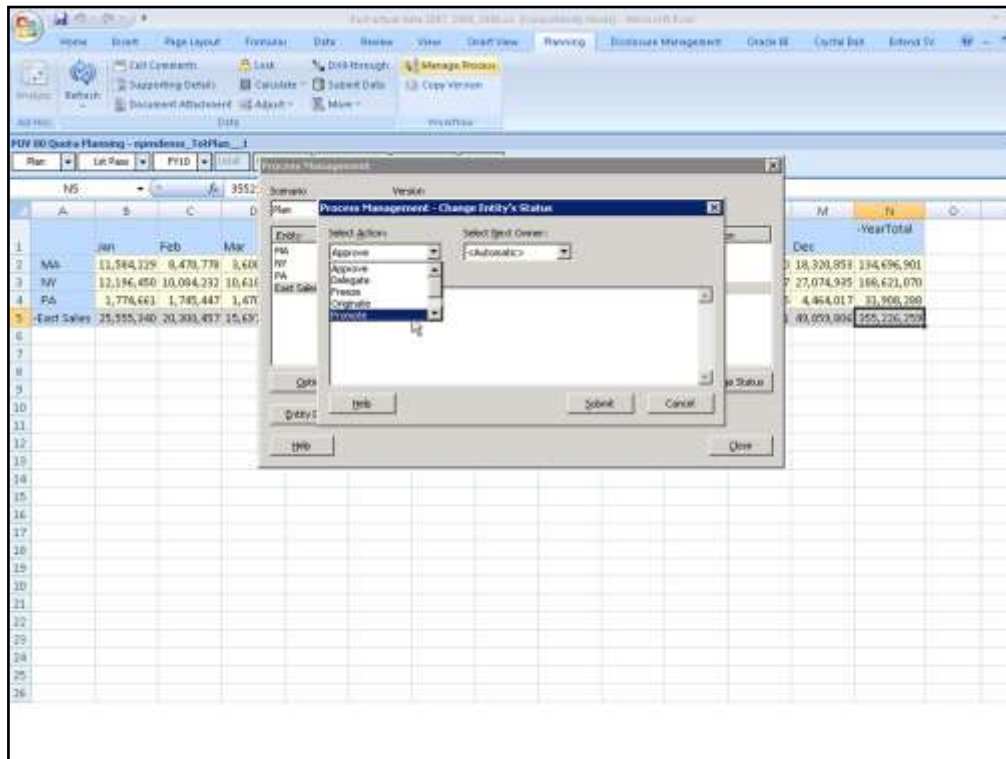


Select Plan for the Scenario and 1st Pass for the Version. Click Go.

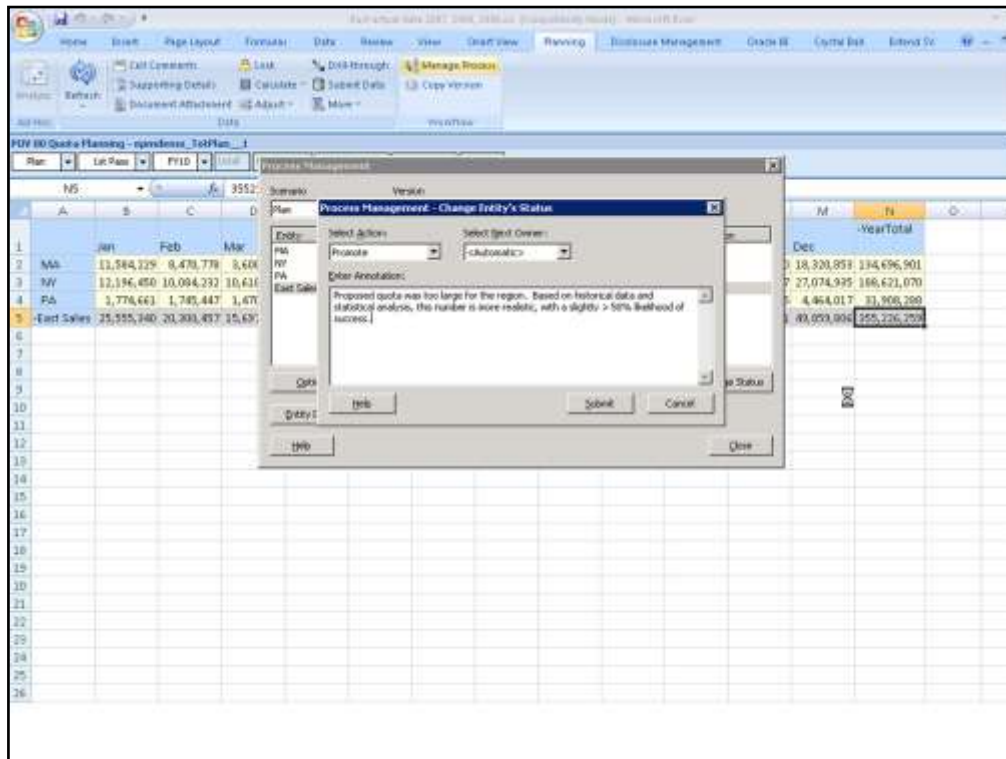
The screenshot shows an Excel spreadsheet with a 'Process Management' dialog box open. The spreadsheet has columns for months (Jan, Feb, Mar) and rows for sales data. The 'Process Management' dialog box has a table with columns: Entity, Process Status, Sub Status, Current Owner, and Location. The 'East Sales' row is highlighted in blue. The 'Change Status' button is visible in the bottom right of the dialog box.

Entity	Process Status	Sub Status	Current Owner	Location
MA	Under Review		Carol Judd	MA
NY	Under Review		Carol Judd	NY
PA	Under Review		Carol Judd	PA
East Sales	Under Review		Carol Judd	

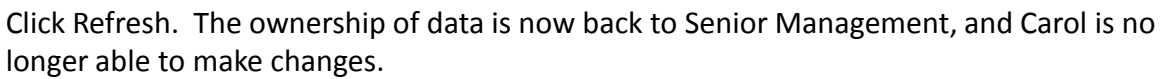
Highlight East Sales and click Change Status.



Select Promote.



Enter an annotation and click Submit.



Oracle Enterprise Performance Management System Workspace, Fusion Edition

logged in as demoadmin | Help | Logout

Home Page Totals - Revenue - 00 Quota Planning

Page: 1 of 1 | 1st Page | Previous | Next | 100 | Go

	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total
FM	608,163	4,147,829	10,196,995	9,742,105	8,700,607	7,301,094	12,235,963	17,064,747	21,520,370	18,320,883	124,686,901
RW	618,804	65,917,981	10,341,013	14,056,301	12,278,289	10,124,298	13,814,637	27,523,762	29,588,447	27,074,935	188,621,870
PA	470,131	1,782,449	1,986,293	2,616,303	1,739,810	1,851,319	2,568,930	5,223,667	5,164,925	4,464,817	31,488,288
East Sales	697,096	16,768,679	22,127,237	26,417,189	23,717,808	19,276,706	28,610,631	50,612,176	56,276,741	49,889,886	395,226,259
CA	210,106	32,980,677	10,529,486	13,794,339	12,989,969	9,815,774	13,798,888	27,694,489	20,920,078	27,112,916	189,676,492
CO	388,073	3,389,899	3,182,193	4,187,328	3,981,932	2,895,496	4,096,219	6,129,732	8,501,452	7,970,230	56,238,824
WA	671,958	1,633,302	1,578,423	2,081,425	1,925,951	1,403,574	1,973,933	3,954,523	4,126,409	3,876,695	27,539,946
West Sales	270,037	15,893,817	15,282,022	19,965,895	18,737,490	14,104,844	19,827,899	39,738,694	41,956,938	38,960,041	272,675,123
IL	246,834	524,200	513,645	670,976	629,796	607,298	695,836	1,372,999	1,426,778	1,346,813	9,316,252
MN	959,128	3,667,620	3,718,815	4,857,956	4,259,723	3,366,817	4,732,926	9,488,164	9,919,963	9,299,950	65,687,768
North Sales	605,961	4,481,820	4,232,459	5,528,931	5,189,521	3,854,108	5,417,965	10,054,123	11,305,731	10,645,671	75,884,820
FL	760,663	2,696,896	2,999,039	3,387,170	3,179,273	2,365,824	3,025,790	6,665,887	6,970,573	6,534,790	46,881,397
TX	108,613	1,075,791	1,038,826	1,380,908	1,287,586	869,867	1,383,438	2,732,648	2,897,606	2,679,628	18,631,936
South Sales	861,267	3,772,637	3,628,864	4,767,775	4,466,859	3,235,722	4,699,225	9,398,181	9,868,179	9,213,527	64,632,903
USA Sales	170,700	41,556,796	46,038,080	50,912,215	54,676,289	41,296,732	59,485,574	113,848,782	119,523,834	112,159,590	785,000,000

Calculate Data From - 00 Quota Planning

Return to the Planning web as demoadmin and navigate to the 00 Quota Planning webform.

Note changes done at the East Sales region.

Click on Save in order to reaggregate data for USA Sales.

Oracle Enterprise Performance Management System Workspace, Fusion Edition - Windows Internet Explorer

http://devadrive:19000/workspace/index.jsp

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

logged in as devadriver | Help | Logout

Home Page | **TotPlan - Revenue - 86 Quota Planning** | Search | Admin

TotPlan

Version: 19000 | Version: 19000 | Version: 19000

Page | Plan | Final | P10 | Go

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
PA	11,504,223	8,470,778	3,608,181	4,187,828	10,193,995	5,742,188	9,700,807	7,381,084	12,235,963	17,864,747	23,522
RY	12,196,450	10,084,232	10,618,004	10,917,803	10,341,012	14,058,301	12,276,209	16,124,280	13,814,637	27,523,762	29,588
PA	1,774,661	1,745,447	1,478,131	1,702,169	1,586,210	2,618,703	1,779,811	1,881,319	2,566,038	5,223,667	5,184
East Sales	25,505,240	20,300,457	15,694,096	16,766,079	22,127,217	26,417,189	23,717,826	19,236,791	26,616,630	50,612,176	56,271
CA	12,313,112	11,097,831	11,218,186	10,950,677	11,529,436	13,754,239	12,999,948	9,815,724	13,746,588	27,634,499	28,001
CO	5,729,626	3,081,718	3,388,073	3,305,839	3,182,590	4,187,308	3,911,932	2,885,496	4,956,219	8,125,712	6,588
WA	1,837,804	1,595,898	1,671,888	1,635,300	1,570,423	2,062,429	1,525,951	1,461,874	1,771,093	3,994,523	4,138
West Sales	17,895,692	14,894,624	16,279,037	15,893,817	18,282,652	19,963,996	18,737,458	14,184,894	19,827,899	39,735,894	41,598
IL	801,158	492,579	946,034	534,200	503,640	976,978	629,798	487,280	905,038	1,372,959	1,408
IN	4,252,458	3,566,243	3,959,128	3,907,028	3,710,815	4,057,956	4,559,723	3,266,817	4,732,928	9,496,304	5,911
North Sales	4,952,606	4,058,822	4,535,961	4,401,828	4,232,459	5,528,932	5,590,521	3,854,138	5,417,968	10,899,123	11,351
FL	3,034,915	2,486,749	2,762,603	2,696,944	2,583,030	3,367,270	3,170,373	2,365,634	3,325,796	6,665,557	6,971
TX	1,359,884	991,398	1,108,613	1,075,191	1,033,826	1,390,528	1,267,596	969,887	1,363,438	2,732,946	2,601
South Sales	4,394,800	3,478,147	3,864,267	3,772,037	3,616,854	4,757,775	4,436,969	3,335,521	4,689,235	9,398,101	9,572
USA Sales	32,635,298	26,654,860	26,734,361	26,835,704	28,288,565	36,646,962	32,891,754	26,517,353	36,933,719	70,688,993	77,841

No Force available

When the calculation is done, change the Version Point of View from 1st Pass to Final.

The plan has been finalized.

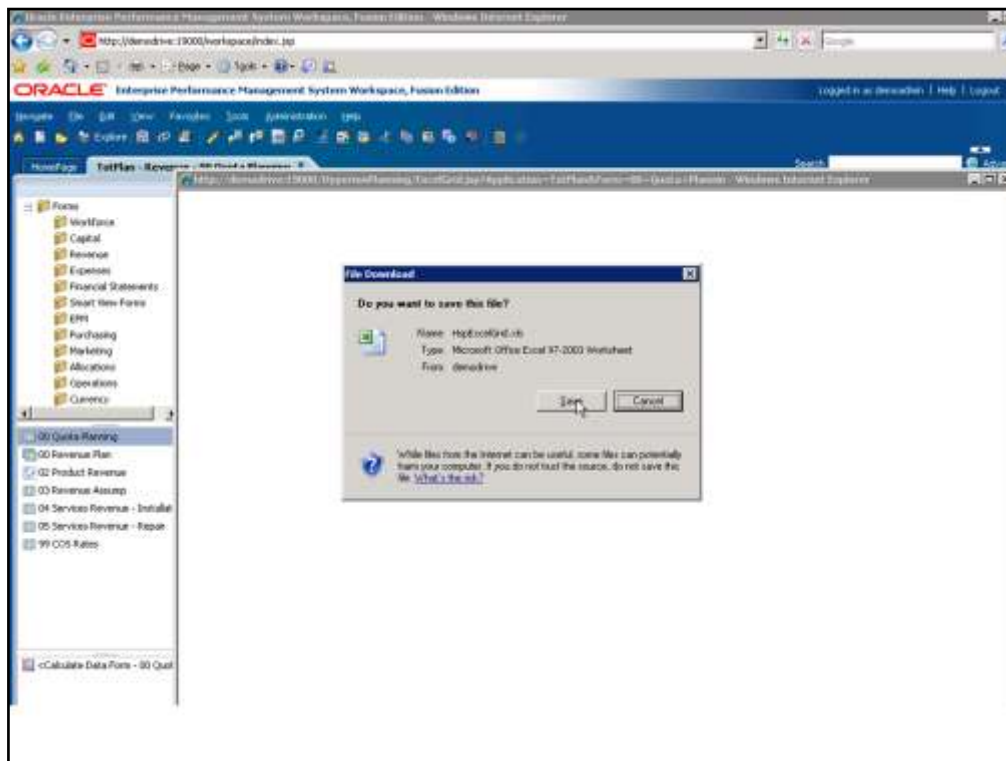
Oracle Enterprise Performance Management System Workspace, Fusion Edition

Tools > Export as Spreadsheet

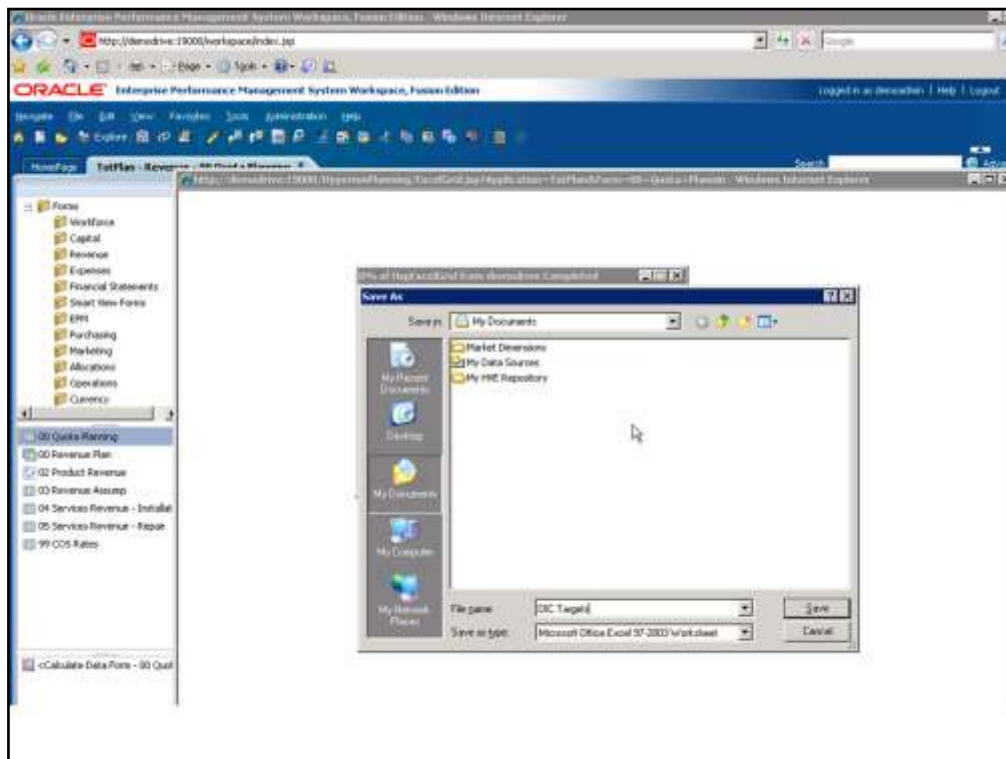
	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Total	5,608,181	4,187,828	10,199,995	5,742,188	9,700,807	7,381,084	12,235,963	17,864,747	23,522
Business Rules	5,618,084	10,917,803	10,341,012	14,058,301	12,276,209	16,124,280	13,814,637	27,523,762	29,588
Job Compile	1,478,131	1,702,169	1,586,210	2,614,703	1,779,811	1,881,319	2,566,038	5,223,667	5,184
Copy Ling	5,697,096	16,766,079	22,127,217	26,417,164	23,717,826	18,238,791	26,418,631	50,612,176	56,271
Custom Links (2)									
Export as Spreadsheet									
UK	12,323,112	31,047,812	11,218,186	10,950,677	13,529,436	13,754,239	12,999,948	9,815,724	13,746,588
CO	5,729,426	3,081,716	3,388,073	3,309,839	3,182,193	4,187,309	3,981,932	2,885,496	4,956,219
WA	1,837,904	1,595,898	1,671,868	1,635,302	1,575,423	2,050,429	1,505,951	1,461,874	1,771,093
West Sales	17,895,692	14,894,624	18,279,027	15,895,817	18,282,632	15,963,098	18,737,458	14,184,894	19,827,899
IL	801,158	492,579	946,034	534,200	503,640	976,978	629,798	487,280	905,038
MN	4,252,456	3,566,242	3,959,128	3,867,028	3,710,815	4,057,956	4,559,723	3,266,817	4,732,928
North Sales	4,952,606	4,058,822	4,535,961	4,401,828	4,232,459	5,528,932	5,599,523	3,854,138	5,417,968
FL	3,034,915	2,486,749	2,762,653	2,696,944	2,583,030	3,367,270	3,170,373	2,365,634	3,325,796
TX	1,359,884	991,398	1,108,613	1,075,191	1,033,836	1,350,528	1,267,596	969,887	1,363,438
South Sales	4,394,803	3,478,147	3,864,267	3,772,037	3,616,864	4,717,775	4,446,959	3,335,721	4,689,235
USA Sales	92,635,398	42,492,860	46,104,581	40,835,704	48,268,565	56,646,992	52,891,754	48,571,373	50,933,719

The last step is to export the final plan so that OIC can load the targets.

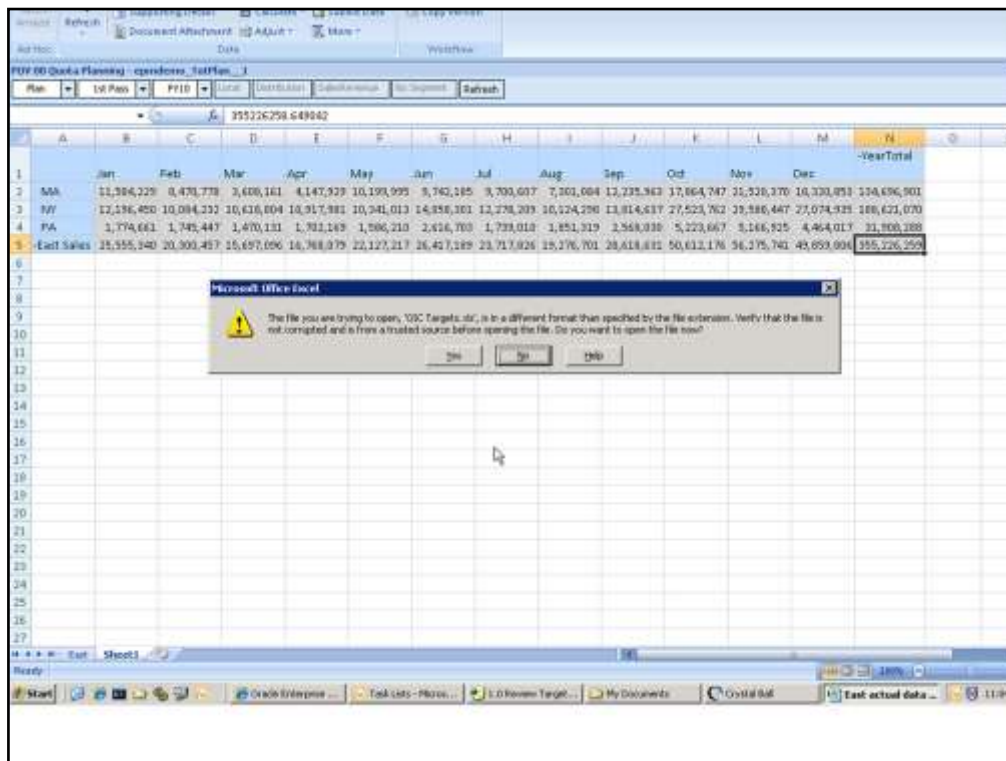
Select Tools > Export as Spreadsheet.



Click Save.



Save the file.



Open the file and click Yes.

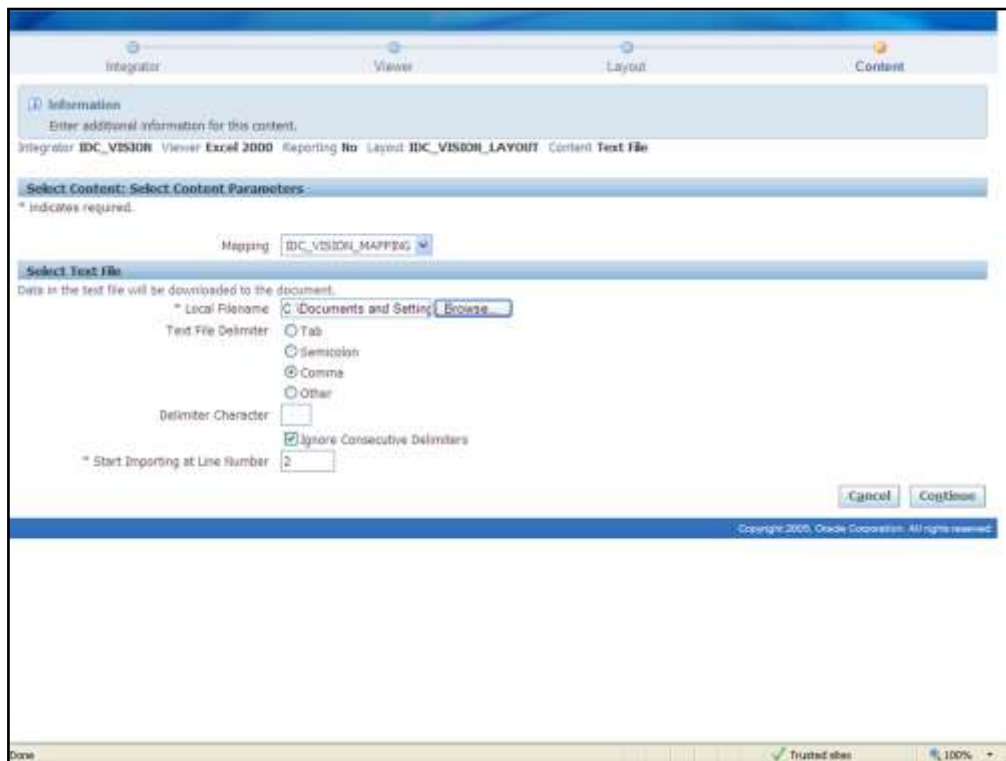
11584228.5007814													
	Local	Distribution	Sales/Revenue	NoSegment	Plan	Final	PY10						
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Ma	11584228.50	6470777.850	3688161.33	4247929.465	10139994.0	3742304.853	3700606.577	7301083.635	12235963.41	17864747.54	21528069.31	18526953.26	
Hi	12196490.27	20084211.79	10418805.81	16917981.37	10341812.78	14856901.24	12278239.21	10124287.88	13814637.44	27525761.65	29388446.8	27074295.42	
Pa	1774660.367	1745447.46	1478130.694	1702168.575	1584210.1	2616703.023	1739010.164	1051313.214	2588030.02	5223668.530	5164524.93	4444016.848	
East Sales	25555599.89	20000457.11	154971095.88	16760079.41	22127217.48	36437109.12	29717925.95	19278780.71	28418630.87	50612175.59	58275741.23	49559009.52	
Ca	12820112.89	10097911.12	11210136	10950676.57	10529486.37	13754308.54	12909967.68	9015773.77	13798807.86	27658458.00	20928877.99	27112915.79	
CO	8724635.188	8051715.527	3388873.149	3308038.983	3182192.744	4137326.377	3801931.648	2085496.267	4056218.715	8129712.016	8501451.833	7970230.015	
ma	1837904.435	1505887.03	1671857.978	1633901.431	1570423.166	2051420.286	1925050.482	1403573.054	1973092.549	3654523.662	4135408.51	3876895.838	
West Sales	17885051.45	14654634.87	16278807.14	15695017.11	15202822.28	19963094.84	18737458.03	14104843.69	19827090.94	30738693.50	41554606.38	38660040.85	
h	881150.2758	492579.0199	546833.7977	534200.421	513644.5435	478575.9288	429790.1114	407298.2005	885036.3308	1072993.000	1435768.668	1346012.772	
MM	4352495.524	3566242.875	3959227.437	3867620.843	3718914.692	4857956.433	4559722.279	366817.308	4712926.395	9466164	9919961.113	9295958.596	
North Sales	4953605.8	4058921.894	4095961.495	4401620.484	4232439.235	5326932.373	5169521.301	3054187.697	5417964.728	10699123.00	11395730.78	10645071.17	
h	8834915.258	2486748.875	2769555.235	2696646.286	2993938.456	3387270.16	3179372.953	2968335.504	3525789.788	6665956.908	6970573.293	6534790.137	
TX	1209685.789	991397.7179	1108615.393	1075190.821	1033625.987	1398805.287	1267595.904	969887.2598	1381454.355	2732544.560	3957606.099	2677020.308	
South Sales	4244801.882	3478146.593	3961266.628	3772037.187	3628864.443	4737770.457	4446958.857	3395726.037	4689224.742	9398101.476	3828179.152	3213826.916	
USA Sales	94512212.78	42638486.0	42178689.82	43566795.77	46038886.4	56812214.89	54678258.82	41995732.71	59485873.83	110840761.8	119523834.2	112159580	

The quotas are extracted from Planning to Excel.



Log into Oracle Incentive Compensation

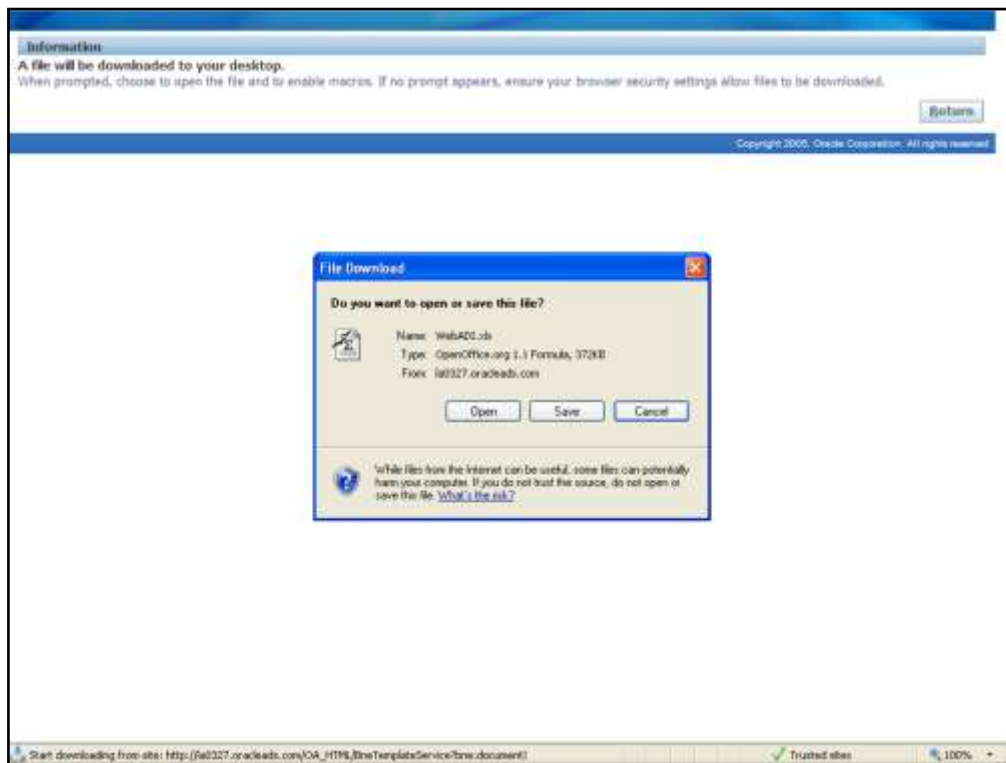
Click **Vision (Quota Uploading)** hyperlink in **Resource Review** portlet at top-left of the screen.



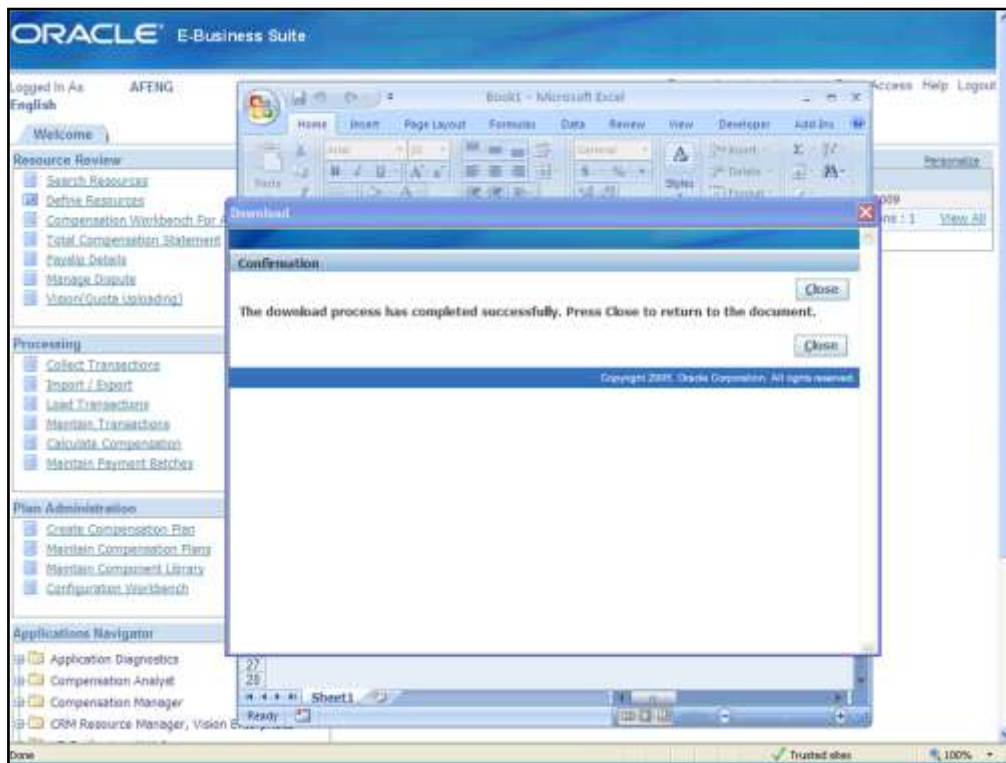
This is the quota import utility tool.

Click Browse button, and query to find the SmartView xls/csv file generated in previous slide.

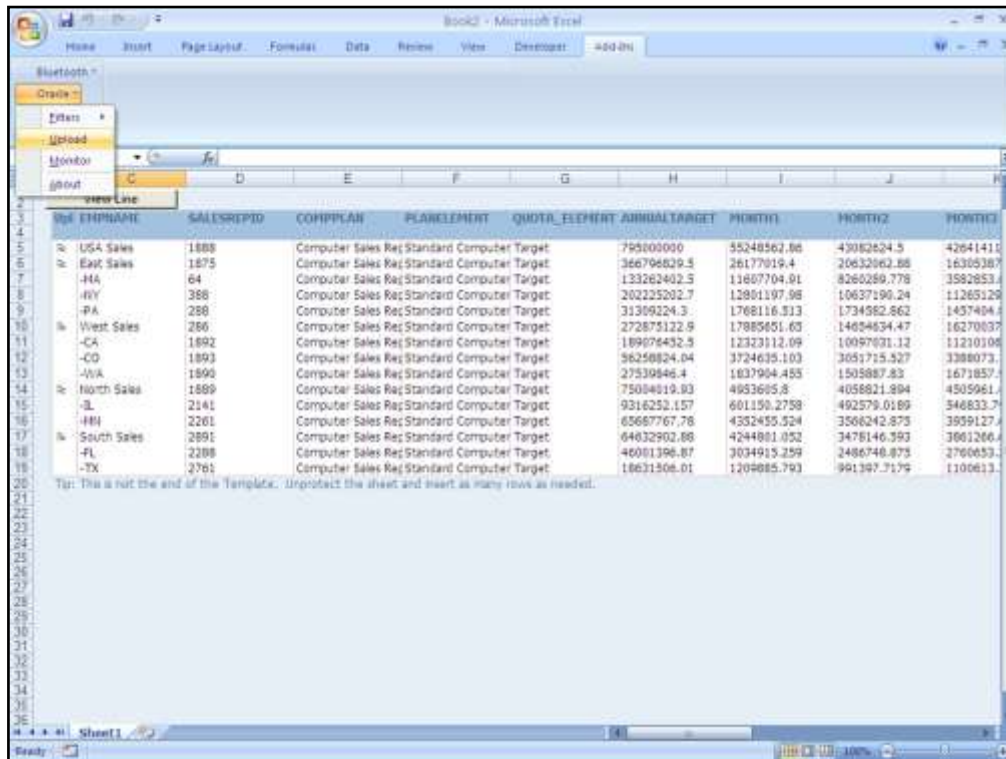
Click Continue



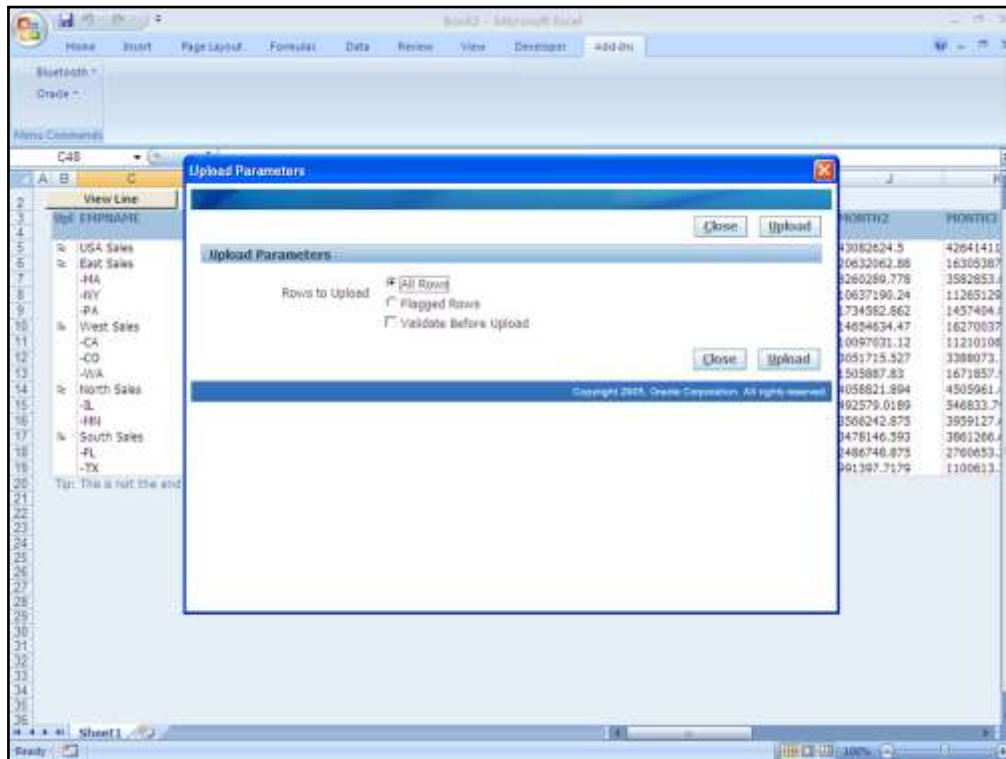
Click Open



Click Close



Preview file before uploading. When satisfied, navigate to Add-Ins ribbon, and select Oracle > Upload



Select All Rows to be Uploaded

Pass New Quotas to OIC via Open API

ORACLE Incentive Compensation
 Resource Setup | Plan Setup | Compensation | **Next**

Compensation Plans | Payment Plans | Pay Groups

Compensation Plans
 * Indicates required field

Expand All | Collapse All

Select Focus Name

- ☐ All Compensation Plans
- ☒ Computer Sales Rep
- ☐ Assembled Computers
- ☐ Service
- ☒ Standard Computers

Update Plan Element: Standard Computers

Earning Rules | Eligible Products | Rate Tables | **Quotas** | Retime

Use Eligible Products Worksheet: No

Target: **8,900,877.60**

Fixed Amount: 0.00

Goal: 0.00

Distribution Detail

WIPB Target, Fixed Amount and Performance Goal are distributed using the plan element's internal type.

Distribution Detail

Period	Quarter	Year	Target Amount	Percent
Jan-09	1	2009	875,947.36	9.83%
Feb-09	1	2009	470,818.88	5.29%
Mar-09	1	2009	520,452.57	5.85%
Apr-09	2	2009	510,362.50	5.73%
May-09	2	2009	490,745.15	5.51%
Jun-09	2	2009	545,269.91	6.13%
Jul-09	3	2009	602,712.94	6.77%
Aug-09	3	2009	402,564.14	4.52%
Sep-09	3	2009	856,435.21	9.62%
Oct-09	4	2009	1,311,794.10	14.73%
Nov-09	4	2009	1,371,754.47	15.41%
Dec-09	4	2009	1,289,555.46	14.49%
Total			8,900,877.60	100.00%

Log back into OIC. You'll note the total Yearly number has been uploaded, as well as the monthly allocation.



FOR MORE INFORMATION...

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