

Lesson 1

Explore Finance Forecasting

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Explore Finance Forecasting

OBJECTIVES

Upon completion of this topic, you will be able to:

- Locate the Finance Forecast tool
- Start Finance Forecast
- Identify the elements of Finance Forecast
- Work with the Navigation Panel
- Navigate Finance Forecast

Introduction

The Mindspeed Finance Forecast tool is a single, integrated, closed loop forecasting system that fosters collaboration of the Mindspeed planning organization.

The forecasting tool serves multiple purposes for the Mindspeed planning organization, including the collection of forecasting data, reporting, and analysis. The tool is tightly integrated with Mindspeed's data warehouse and ensures the integrity and validity of all data collected from the end user and presented for reporting and analysis.

The Mindspeed finance team will use the Finance Forecast tool to monitor forecasted sales, run reports, and analyze past, current, and future forecasts, demand, and trends.

Before using the Finance Forecast tool to create and analyze forecasts, you will become familiar with the forecasting tool.

1.1 – Start Finance Forecast

The Finance Forecast Tool is accessed from the Dashboard Portal.

1. Navigate and log in to the Dashboard Portal
2. Select the Finance Forecast tab

The Finance Overview page loads.

The screenshot shows the SAP Marketing Overview page. The left sidebar contains a 'Detailed Navigation' menu with options like 'Marketing Overview', 'Marketing Input Layout', 'Marketing Results', 'Billing past 8 & Backlog 3 Qtrs', 'Collaboration Report', 'Marketing Variance Report', 'Unltd', and 'Program Matrix Update'. The main area displays a 'Marketing-Overview' table with columns for SPL/Product, EC Search Term, Material, Program Name, Qtr/Fisc. Year, and forecast data for quarters 3/2007 through 4/2008. The table lists various products like ATM/PLS, CISC0, and programs like CMEGA/WINSTAR, ZENITH, PINNACLE, UNKNOWN, ZENITH, BARBARIAN, TEST-23, NOT ASSIGNED, ESP, and PACKET SERVER.

SPL/Product	EC Search Term	Material	Program Name	Qtr/Fisc. Year	3/2007	4/2007	1/2008	2/2008	3/2008	4/2008
ATM/PLS	CISC0	CX27410-13	CMEGA/WINSTAR	Forecast Qty	EA	325				
				Forecast Rev	\$	22,219				
		CX27405-12	ZENITH	Forecast Qty	EA	2,550	3,100			
				Forecast Rev	\$	1,850	900			
		CX27410-13	PINNACLE	Forecast Qty	EA	5	5	5	5	5
				Forecast Rev	\$	1,000,000	800,000	800,000	800,000	800,000
		CX27410-13	UNKNOWN	Forecast Qty	EA	1				
				Forecast Rev	\$	-131				
		CX27410-13	ZENITH	Forecast Qty	EA	100	100	100	100	100
				Forecast Rev	\$	4,875	275	200	500	500
		M27483-18	BARBARIAN	Forecast Qty	EA	22	18	9,999	9,999	9,999
				Forecast Rev	\$	1,000	8,000	3,200,000	3,200,000	3,200,000
TEST-23	CX27410-12	Not assigned		Forecast Qty	EA	2				
				Forecast Rev	\$	-3,327				
	CX27410-13	Not assigned		Forecast Qty	EA	1				
				Forecast Rev	\$	0				
WOTEL	CX2751-12	ESP		Forecast Qty	EA	888	957			
				Forecast Rev	\$	1,000,000	1,000,000			
	CX27410-13	PACKET SERVER		Forecast Qty	EA		1,520			
				Forecast Rev	\$		173,368			
DASF	CX27410-13	PACKET SERVER		Forecast Qty	EA	1,004	1,004			
				Forecast Rev	\$	549,020	230,410			

1.2 – Explore the Finance Forecast Window

The Finance Forecast tool contains several interactive forms that allow you to view forecast data, find forecast data, and enter forecast data, all from the same location. To begin using Finance Forecast, you will identify the different areas of the tool and their functions.

1. View the Finance Forecast tab

The pane at the top of the Finance Forecast tab contains the title of what you are currently viewing on the left and the navigation commands on the right.



1.2 – Explore the Finance Forecast Window

The pane on the left is the Navigation Panel. The pane on the right is Content pane. The Content pane is where your forecasts, graphs, and reports are displayed. The default page is the Finance Overview report.

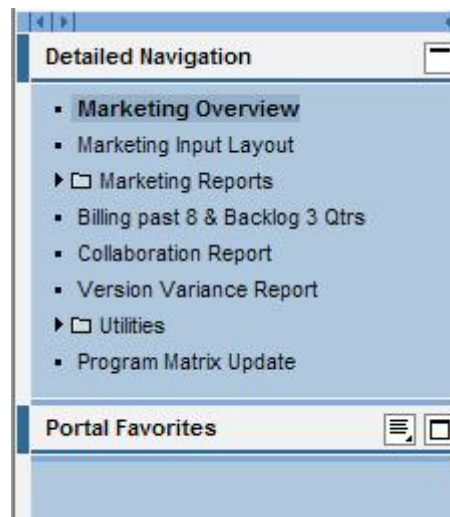
Navigation panel

SPU/Product	EC Search Term	Material	Program Name	Qty / Pcs. Year	3/2007	4/2007	1/2008	2/2008	3/2008	4/2008
ATM/PLS	DISCO	CX27410-13	ONEGL/WINSTAR	Forecast Qty	EA	225				
			Forecast Rev	\$		22,215				
			Forecast Qty	EA	2,550	3,100				
			Forecast Rev	\$	1,550	900				
		CX27405-12	PINNACLE	Forecast Qty	EA	5	5	5	5	5
			Forecast Rev	\$	7,900	8,100	8,100	8,100	8,100	8,100
			Forecast Qty	EA		1				
			Forecast Rev	\$		-151				
		CX27410-12	UNKNOWN	Forecast Qty	EA	100	100	100	100	100
			Forecast Rev	\$	4,575	275	200	500	500	0
		M27483-15	BARBARIAN	Forecast Qty	EA	22	18	9,999	9,999	9,999
			Forecast Rev	\$	7,570	6,365	3,281,654	3,281,654	3,281,654	3,281,654
		TEST-23	CX27410-12	Not assigned	EA		2			
			Forecast Rev	\$		-3,927				
		DISCO	CX27410-12	Not assigned	EA		1			
			Forecast Rev	\$		0				
		WOTEL	CX27511-12	ESP	EA	666	957			
			Forecast Rev	\$	1,111,458	1,181,021				
		DASF	CX27410-13	PACKET SERVER	EA		1,520			
			Forecast Rev	\$		173,388				
			Forecast Qty	EA	1,104	1,104				
			Forecast Rev	\$	540,220	230,410				

The Content pane is where you view forecasts, graphs, and reports.

4. View the Navigation Panel

The Navigation Panel contains links to the most frequently viewed forecast and report items, including your favorite links.

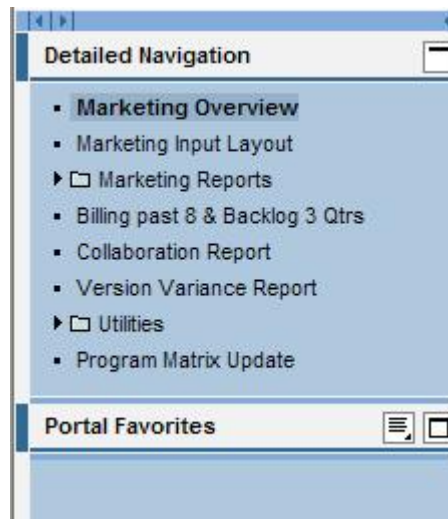


1.3 – Work with the Navigation Panel

The Navigation Panel provides shortcuts to the most commonly used views in Finance Forecast. You can use the Navigation Panel to load the Finance Overview page, run reports, and navigate to your favorite forecasting resources.

1. View the Navigation Panel

The Navigation Panel is separated into two trays. The Detailed Navigation tray contains links to the most frequently viewed resources in Finance Forecast. The Portal Favorites tray contains links to views that you save to the Navigation Panel.



2. Place the pointer over the left pointing arrow in the upper-right corner of the Navigation Panel

The tooltip indicates that this arrow allows you to collapse the Navigation Panel.



3. Click the arrow

The panel collapses and the panel on the right becomes larger.

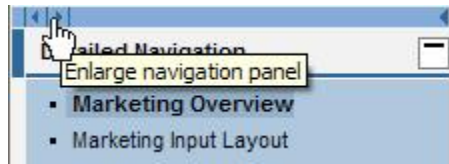
4. Click the arrow again

The Navigation Panel opens.

5. Place the pointer over the right pointing arrow in the upper-left corner of the Navigation Panel.

1.3 – Work with the Navigation Panel

The tooltip indicates that this arrow allows you to make the Navigation Panel larger.



6. Click it

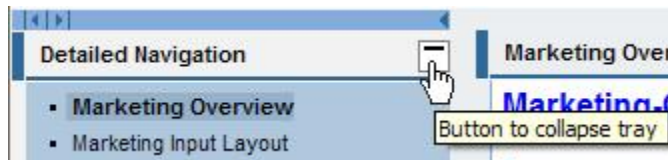
The panel widens.

7. Click the left pointing arrow in the upper-left corner of the Navigation Panel

The panel narrows.

8. Place the pointer over the button on the right side of the Detailed Navigation header

The tooltip indicates that this button allows you to collapse the Detailed Navigation tray. A tray can be expanded (open) or collapsed (closed). When a tray is expanded, its button allows you to collapse it. When a tray is collapsed, its button allows you to expand it.



9. Click the Collapse Tray button

The Detailed Navigation tray closes. The Collapse Tray button is now the Expand Tray button. When a tray is collapsed, it does not lose its data. The data is only hidden from view.

10. Click the Expand Tray button

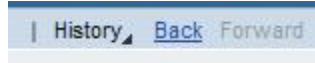
The Detailed navigation tray opens.

1.4 – Navigate Finance Forecast

The Finance Forecast tab provides several ways by which you can navigate the Finance forecasting views.

1. **View the navigation commands on the right side of the top pane**

These commands allow you to navigate based on your Dashboard portal browsing history.



2. **Click History**

A list of previous Finance Dashboard pages you have viewed appears. By selecting a page from the list, you will navigate to that page.

3. **Click Back**

You navigate back to the previous page you viewed.

4. **Click Forward**

You navigate to the first page you viewed following the previous page.

5. **In the Detailed Navigation pane, click a link**

You navigate to that page.