Maintaining Forecast Grouping (W5)

This version is superseded. Click here to view the latest guide.

PURPOSE

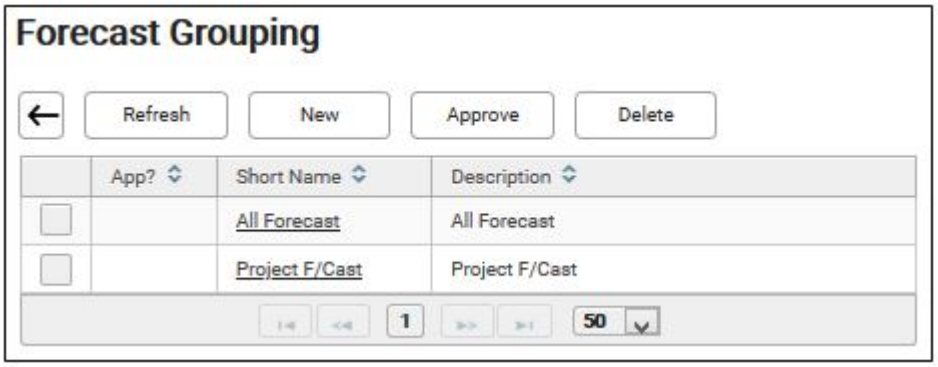
This is a detailed procedure on how to maintain forecast grouping.

WHY IS THIS IMPORTANT?

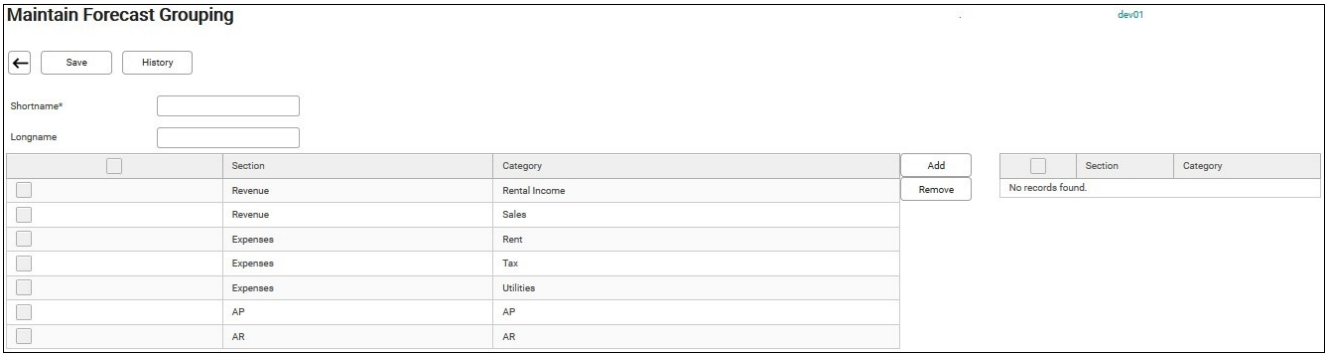
Forecast grouping maintenance allows user to classify individual forecast sections and categories into groups.

PROCEDURE

1. In the Forecast Section / Category Maintenance screen, click on Grouping. The Forecast Grouping screen will be displayed.

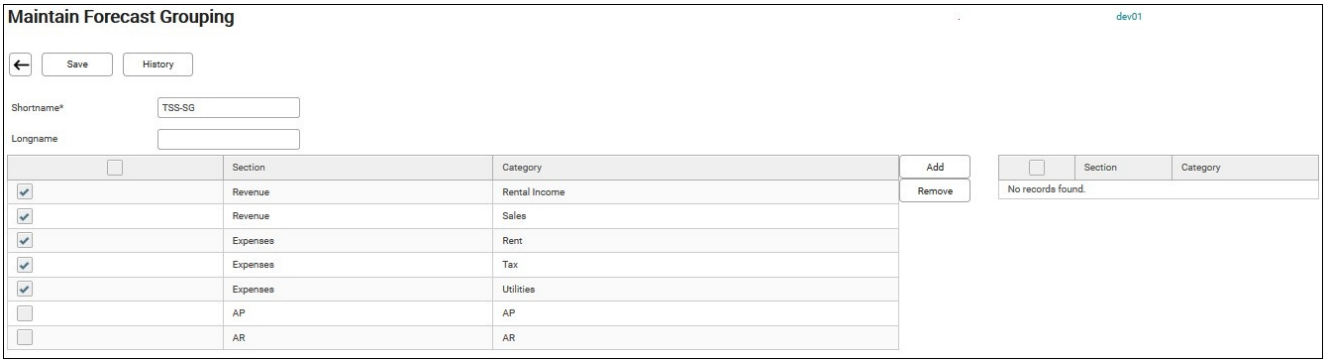


2. To add a new forecast group, click on New. The screen below is displayed.

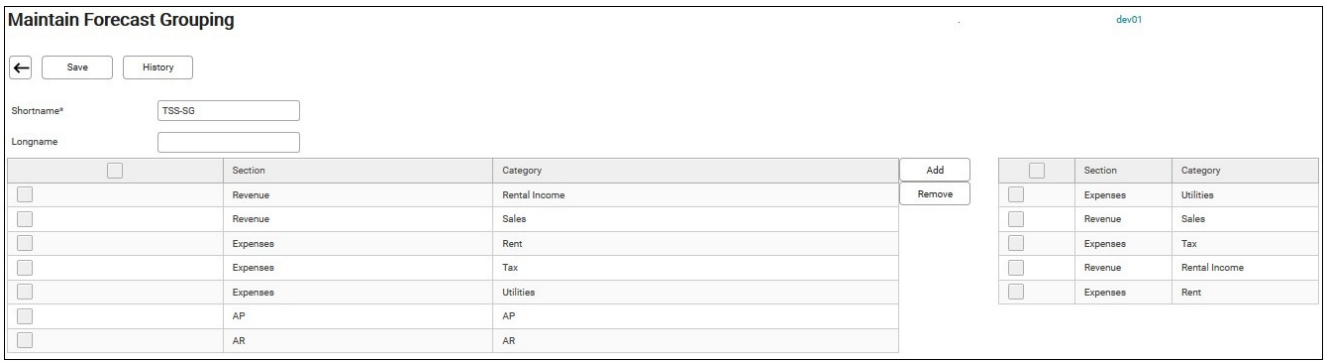


3. Type in the preferred short name; it must be unique. Longname field is optional.

4. Next, select the forecast items to include in this group by ticking the boxes beside it.



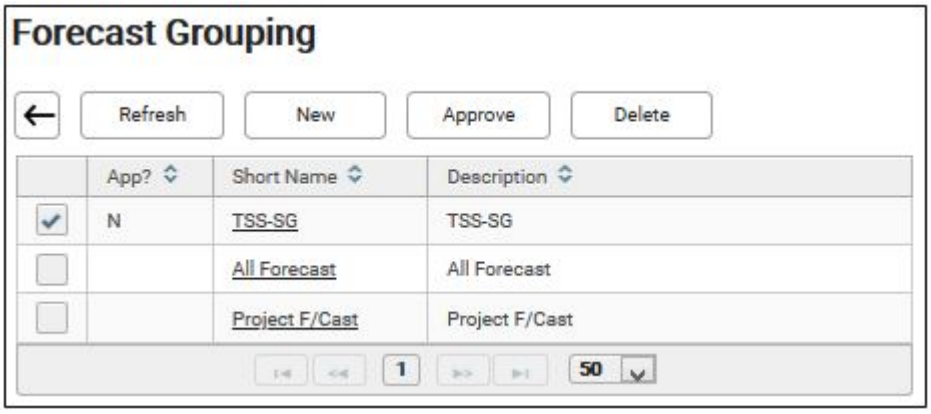
5. Click on Add. All lines selected will be on the right.



6. Click the Save button. A message prompt saying “Forecast grouping saved successfully” will be on the screen.

7. Click on Back Button to go back to the Forecast Grouping screen.

8. The created forecast group needs to be approved before it can be used. To do that, tick the checkbox before the letter N in the same line as the new forecast group.



9. Click Approve.

RELATED INFORMATION

Viewing and Creating Forecast Section Category

CHANGE HISTORY

Date	By	Changes
15-Feb-2008	-	Created
8-Jan-2015	Clarissa	Reformatted. Rewritten.
7-Jun-16	Richard	Proofread
20-Nov-2019	Lyra	Updated Screenshots.