

Forecasting and Reporting Tabs Overview – Quick Reference Guide

Forecasting Workflow

Illumina's forecasting workflow helps illustrate the steps that need to be completed for each node – **Key Account Groups** and **“Other”** nodes:



Required Forecast Inputs

Forecast inputs need to be made for each platform as well as all other Illumina products. The table below identifies required inputs for instrument, consumables, infinium, etc.

Instruments Required Inputs: <ul style="list-style-type: none">Order QuantityOrder Amount (\$)Shipment QuantityShipment Amount (\$)Order POS Service Contract Amount (\$)Shipment POS Service Contract Amount (\$)	Decommissions Required Inputs: <ul style="list-style-type: none">Quantity on product/customer level	Consumables Required Inputs: <ul style="list-style-type: none">Order Amount (\$)Shipment Amount (\$)	Surveillance Required Inputs: <ul style="list-style-type: none">Override Samples per KitForecast StatusInstall Base for SurveillanceSamples by QuarterInstrument quantity by Quarter
Infinium Required Inputs: <ul style="list-style-type: none">ASPSample Quantity	Other Required Inputs: <ul style="list-style-type: none">Order Amount (\$)Shipment Amount (\$)	Svc Renewal* Required Inputs: <ul style="list-style-type: none">Order Amount (\$)Shipment Amount (\$)	Fixed Instr. Base Warranty Renewals* Required Inputs: <ul style="list-style-type: none">Number of Units

*Svc Renewal & Forecasted Instruments Base Warranty Renewals Inputs are entered by the Product Care Representatives

Sales Forecast Landing Page

1. Navigation bar (Instrument Input, Decommissions, Consumables Input, Surveillance Input, Infinium Input, Other, Svc Renewal Input, Fixed Base War, Product Search)

2. Territory Selection (Key Accounts, Other)

3. Input Grid (Table with columns for dates and input values)

4. Rollup vs Forecast (Chart showing forecast vs actual data)

5. Product Selection (List of products like NovaSeq 6000, HiSeq 4000, etc.)

6. Opportunities (Table with columns for Opportunity ID, Name, Amount, etc.)

7. Quarter Selection (Dropdown menu for selecting a quarter)

<http://go/salesforecast>

- Navigation bar:** Quick way to navigate and select the product to forecast
- Territory:** Select territory or Key Accounts to view. Inputs are done at Key Account Level
- Input Grid:** Input your Orders & Shipment forecast in the editable white cells
- Rollup vs Forecast:** Rollup to forecast comparison eye chart with rollup breakdown
- Product Selection:** Click on a product to filter the data in page for the selection
- Rollup Detail:** Opportunity and Backlog Details available on the same page
- Quarter Selection:** Clicking on a quarter filters the data in the page for the selected quarter

Other Sales Reporting

Supplemental information to support forecast activity.

Reports include:

- Summary
- Trends
- Forecast Accuracy
- Variance Commentary
- Forecast Review
- Slice & dice Opportunity, Backlog, Order & Shipment details

Other Important Items

Any updates to a forecast requires an entry in the Variance Commentary tab located in the Sales Reporting book. The variance commentary provides insight to DSM, Sub-Regional RD and Finance VP and flags changes made to the forecast.

- Select Sales Reporting book
- Select Var Commentary tab
- Select Territory and Quarter
- Add commentary in the white cell



Additional Resources

Document Name	Description
IBM Planning Analytics (TM1) Overview	Understanding Illumina's forecasting process and how to use IBM Planning Analytics (TM1) tool
Forecasting Overview at Illumina	Quick Reference Guide (QRG) for users to reference on Illumina's forecasting process
Customise Forecasting Views	Quick Reference Guide (QRG) for users to reference on how to set up a custom view
WalkMe Self Learning with IBM Planning Analytics (TM1)	TM1 Self-Guided experience which provides user the ability to reference key material while inputting or reviewing forecast detail
Advanced Report Creation	Using advanced forecasting reports to review forecast inputs (e.g., var commentary)

Sales Forecast Input – Quick Reference Guide (Windows)

Shorthand

“K” = Thousands

Type “984K” and click Enter

“M”= Millions

Q3-18
984K

 →

Q3-18
\$984,000

Copy Paste

Copy Ctrl + C **Paste** Ctrl + V

Q4-18	Q1-19
Copy \$95,000	Paste Here

 →

Q4-18	Q1-19
\$95,000	\$95,000

Copy to Multiple Cells

How to copy the same value to all the cells on the right.
e.g., Type “>185K” on the input cell and click enter.
The value will be copied to all the cells to the right.

Q3-18	Q4-18	Q1-19	Q2-19
>185K			

 →

Q3-18	Q4-18	Q1-19	Q2-19
\$185,000	\$185,000	\$185,000	\$185,000

Search

Click on the Product Label name.

Click on the magnifying glass icon



Type in the box for the product of interest

< Search

Search

Product Selection

NovaSeq Consumables

HiSeq X Consumables

HiSeq HD Consumables

Click on the desired product item

Expand & Collapse

Use the to expand grouped content

Use the to collapse grouped content

Order Input \$
Order Rollup Qty
Order Qty QTD
Order Commit Qty
Orders Rollup ASP

 →

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Order Rollup Qty
Order Qty QTD
Order Commit Qty
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Adjust Screen Size

Use Ctrl + - keys to Zoom Out the screen

Size or use Ctrl + + keys to Zoom In the screen size and fit the content to the size of your screen.

Export to Excel

Use the action menu to export to excel.

Click anywhere on the object to filter so you see the icon:



Click on the blue box to open the action menu:



Click on icon to Export.

Follow instructions to export to Excel



Save s Data Sheet View

Click on the blue box to open the action menu.

Click on the Save Icon



-Name the view

-Click on ‘Personal’ folder

-Click Save

Save view as

Name
Text

Tags

Description

Location
☐ Shared
☒ Personal

Note: Permissions for the view will be inherited from the folder it's saved to.

Save Cancel

Sales Forecast Input – Quick Reference Guide (MAC Friendly)

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