

Building a Demand Forecast | Configure a Skill

INTRODUCTION

A **Skill card** is the gateway to review and act on recommendations from the Aera home page. One or more skill cards are displayed based on the roles and permissions assigned to a user.

Why configure a skill?

Skills are configured to enable the end user to easily access the objects that are required to review or make a decision.

Configuring a skill is the final step in delivering a business-ready skill.

Design parameters

If you recall the demand forecasting skill that you have developed consists of three important aspects:

- Demand Forecast
- The Recommendations that need to be acted upon
- The performance of the skill

You will now configure the skill card in a way that the end user can use it to review or act on the recommendation based on the above parameters

The data in some screenshots may not match the instructions and are illustrative; in such cases, please follow the instructions.

KEY TAKEAWAY

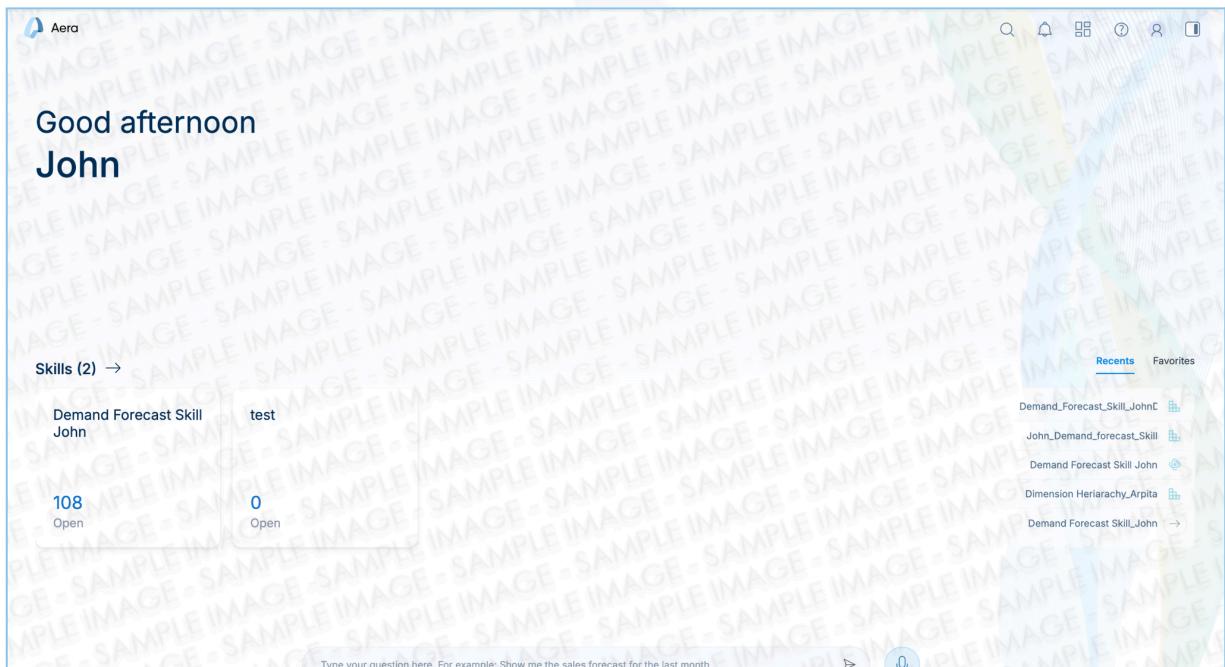
After completing this hands-on, you will be able to:

- Configure a skill
- Design the Skills UI page

EXPECTED RESULTS

The home page has to display the newly created skill, as shown in the image below.

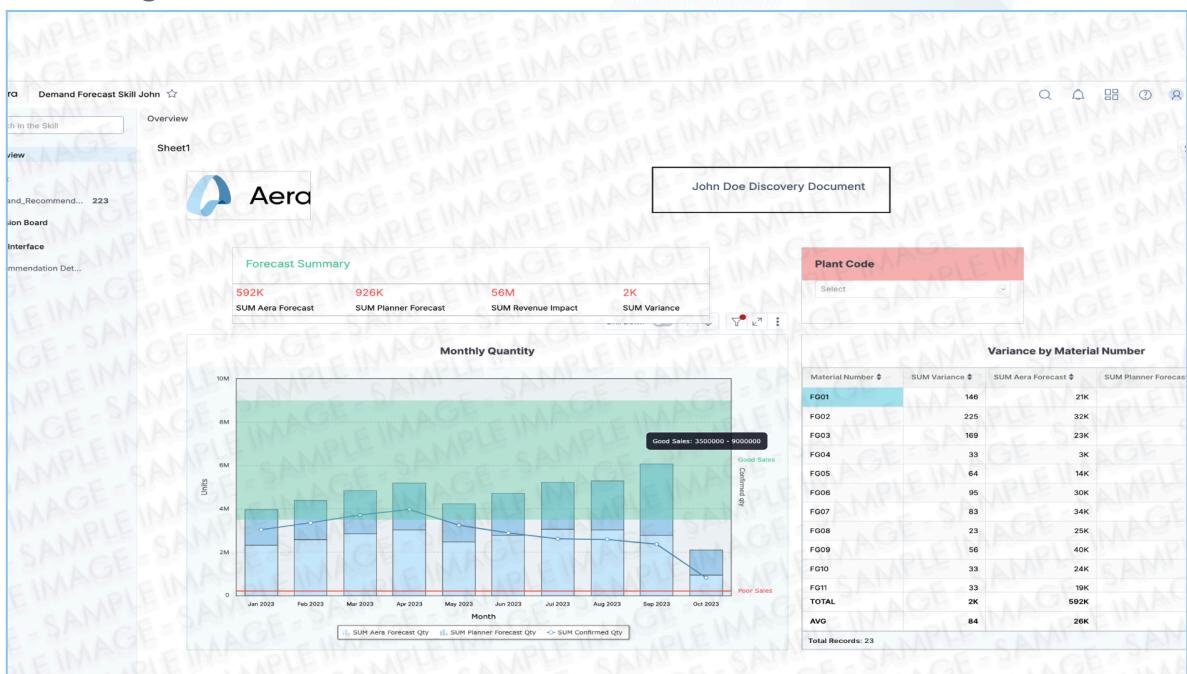
View of skill card on home page



The screenshot shows a skill card for "Demand Forecast Skill John". The card displays the following information:

- Good afternoon John**
- Skills (2) →**
- Demand Forecast Skill John**: Status **test**, Open count **108**.
- Dimension Hierachy_Arpita**: Status **Open**, Count **0**.
- Recent Items** (list):
 - Demand_Forecast_Skill_JohnC
 - John_Demand_forecast_Skill
 - Demand Forecast Skill John
 - Dimension Hierachy_Arpita
 - Demand Forecast Skill_John

Skill Overview Page

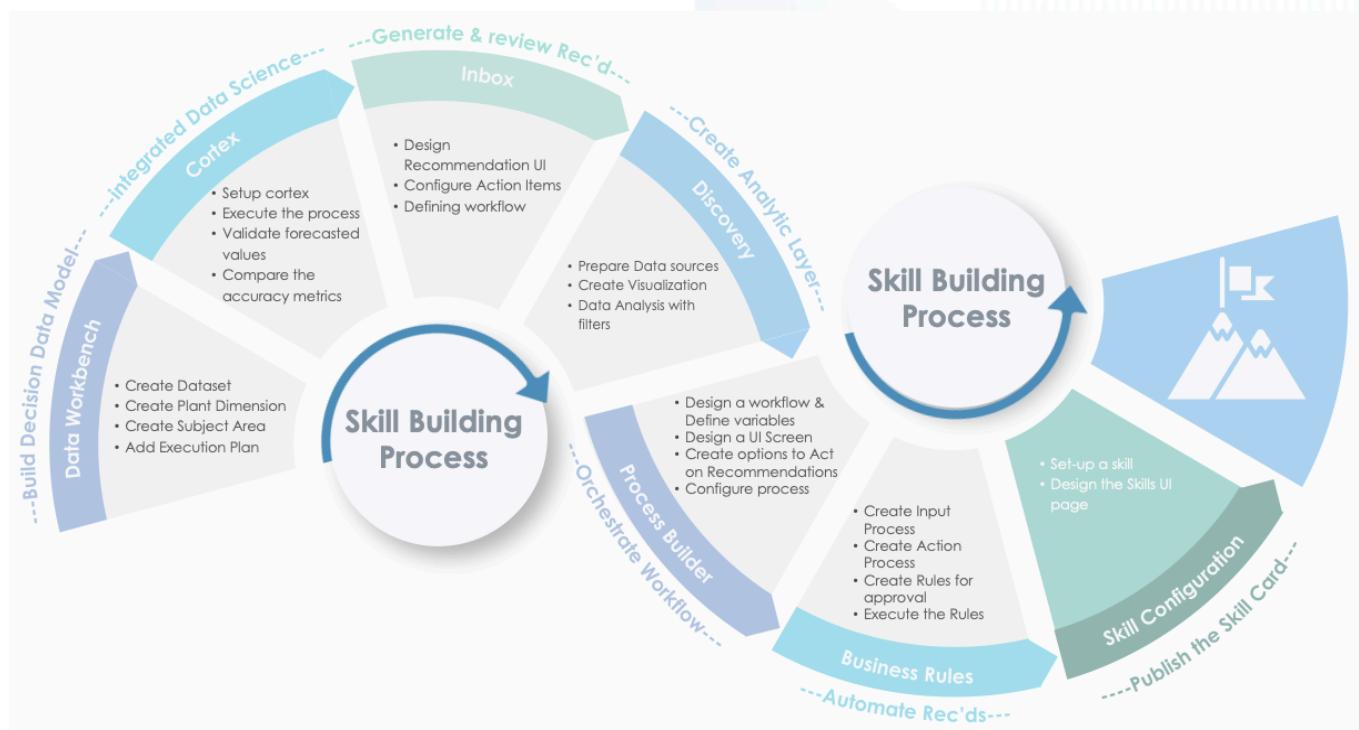


The screenshot shows the Skill Overview Page for "Demand Forecast Skill John". The page includes the following components:

- Left Sidebar:** Shows the skill's name and a list of related items like "Demand_Recommend..." (223), "Forecast Board", "Interface", and "Recommendation Det...".
- Overview Panel:** Displays a summary table and a chart.
- Summary Table:**

Forecast Summary			
592K	926K	56M	2K
SUM Aero Forecast	SUM Planner Forecast	SUM Revenue Impact	SUM Variance
- Chart:** A stacked bar chart titled "Monthly Quantity" showing sales from January to October 2023. The chart includes a legend for "SUM Aero Forecast Qty", "SUM Planner Forecast Qty", and "SUM Confirmed Qty".
- Right Panel:** Includes a "John Doe Discovery Document" box and a "Plant Code" dropdown.
- Table:** "Variance by Material Number" showing data for 23 records.

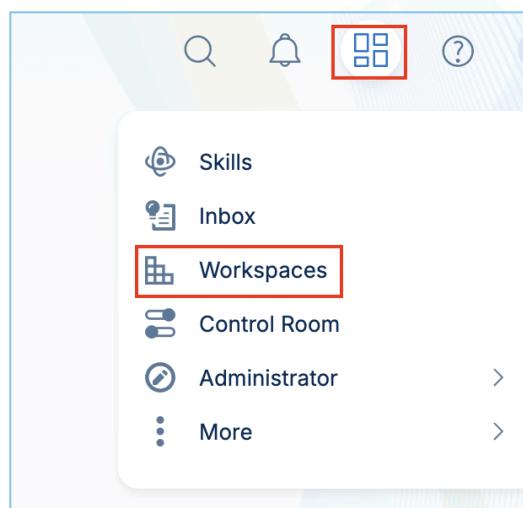
SKILL BUILDING PROCESS



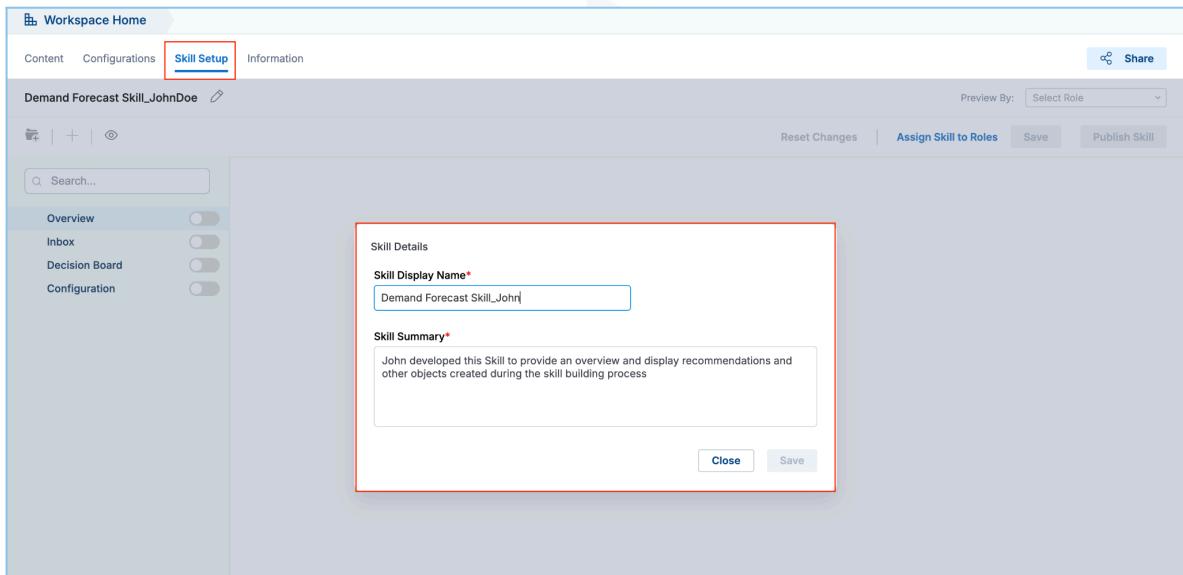
TASKS AND STEPS

Configuring the Skill

1. Click the **Aera Menu** icon on the Aera Decision Cloud and then click the **Workspaces**.



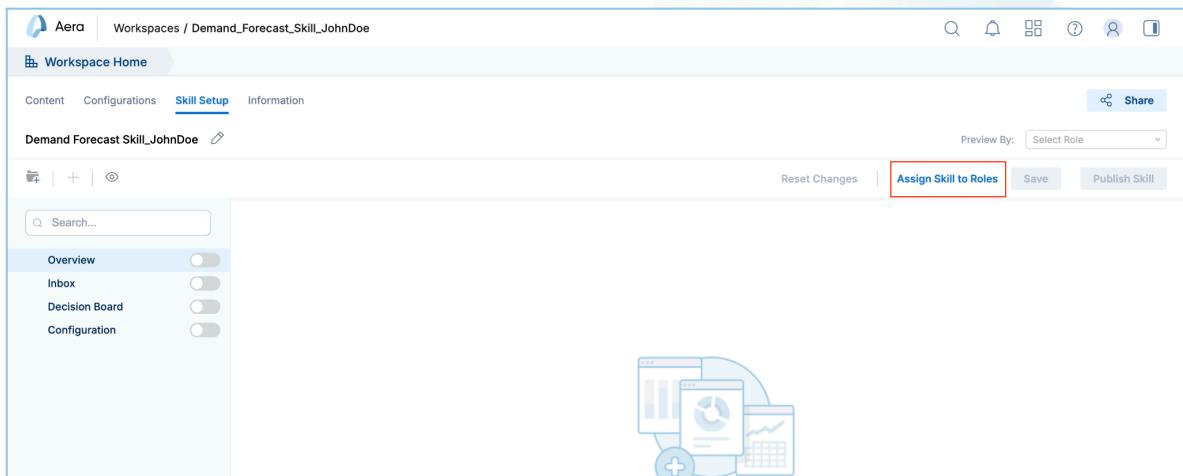
2. From the Workspaces page, go to the Workspace **Demand Forecast Skill_<Username>** that you created previously, and go to the **Skill-setup** tab.
3. Enter the **Skill Display name** as **Demand Forecast Skill <Username>** and provide the **Skill Summary** on the **Skill Details Dialogue box** as shown in the image below.



The screenshot shows the Aera workspace interface with the 'Skill Setup' tab selected. A red box highlights the 'Skill Display Name' input field, which contains the text 'Demand Forecast Skill_JohnDoe'. Below this, there is a 'Skill Summary' section with a detailed description: 'John developed this Skill to provide an overview and display recommendations and other objects created during the skill building process'. At the bottom right of the dialog are 'Close' and 'Save' buttons.

Enter an appropriate display name and a detailed description of skill. The display name will appear on the Aera home page, and the skill description provides the end users the context and the objective of the skill.

4. After updating the name and description, click on **Assign Skill to roles**.



The screenshot shows the Aera workspace interface with the 'Skill Setup' tab selected. A red box highlights the 'Assign Skill to Roles' button, which is located at the top right of the screen. The interface includes a search bar, navigation icons, and a sidebar with 'Overview', 'Inbox', 'Decision Board', and 'Configuration' options.

Permissions are set for a skill card at two levels:

- For the entire skill card
- For each section within a skill card

Select the roles for whom you want to display this skill and click

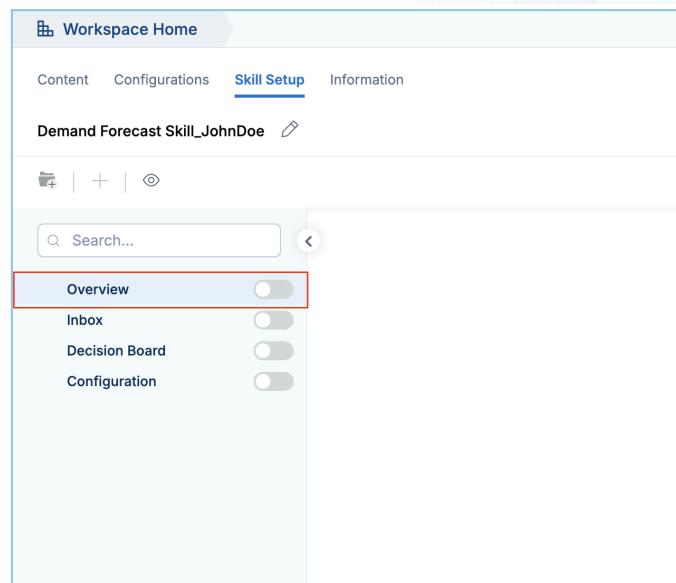
5. Assign Role. (Select **Developer, Skills Builder Role**)

Assign Skill to roles

Role	Subject Areas
<input type="checkbox"/> all	CWB-CDB sync skill tables, Cortex Sales Data
<input type="checkbox"/> API Key Access	
<input type="checkbox"/> CWB Decision Board	CDB Recommendations, CDB Recommendations History
<input type="checkbox"/> Data Workbench Models	Sales Order John, Test_Ani
<input checked="" type="checkbox"/> Developer	
<input type="checkbox"/> Discovery	CWB-CDB sync skill tables, CWB-CDB sync system tables
<input type="checkbox"/> Production Planning	
<input checked="" type="checkbox"/> Skills Builder Role	CORTEX_VARIABLE_IMPORTANCE, CORTEX_PAYLOAD
<input type="checkbox"/> System Administrators	Sales Order John, CORTEX_VARIABLE_IMPORTANCE
<input type="checkbox"/> test_role	

[Cancel](#) [Assign](#)

6. Toggle the overview page on the left navigation panel to link the objects.



7. In the **Add page** window, select the object type as **Discovery**.
8. Click on **Select-Object** to choose an object. The object that you choose here is the one that gets displayed when you select a skill card.

Add Page

Page Name*

Object Type*

Dashboard Discovery Discovery (Old) Report Process

Object*

Role*

Select Role

ⓘ You haven't assigned this Skill to Roles. Please [Assign Skill to Roles](#) to populate them here.

These are the objects that are available for selection:

- Dashboard
- Discovery
- Report
- Process

9. From the **Select Discovery & Add Visuals** window, select the **Discovery_Document_John** you created.

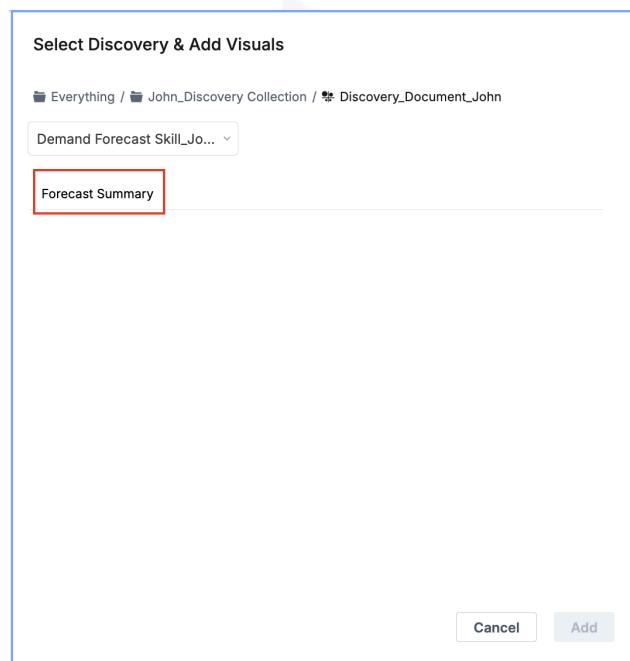
Select Discovery & Add Visuals

Everything / John_Discovery Collection

Demand Forecast Skill...

Discovery_Document_John

10. Select the **Forecast Summary** sheet and click on **Add**.



Select Sheet

Forecast Summary

John Discovery Document

Material Number

Forecast Summary

4M	6M	384M
SUM Aera Forecast	SUM Planner Forecast	SUM Revenue Impact

Monthly Qty Chart

Variance by Material

Add

11. By default, all **Roles** assigned to this skill will be selected.

Add Page

Page Name*

Object Type*

Dashboard Discovery Discovery (Old) Report Process

Object*

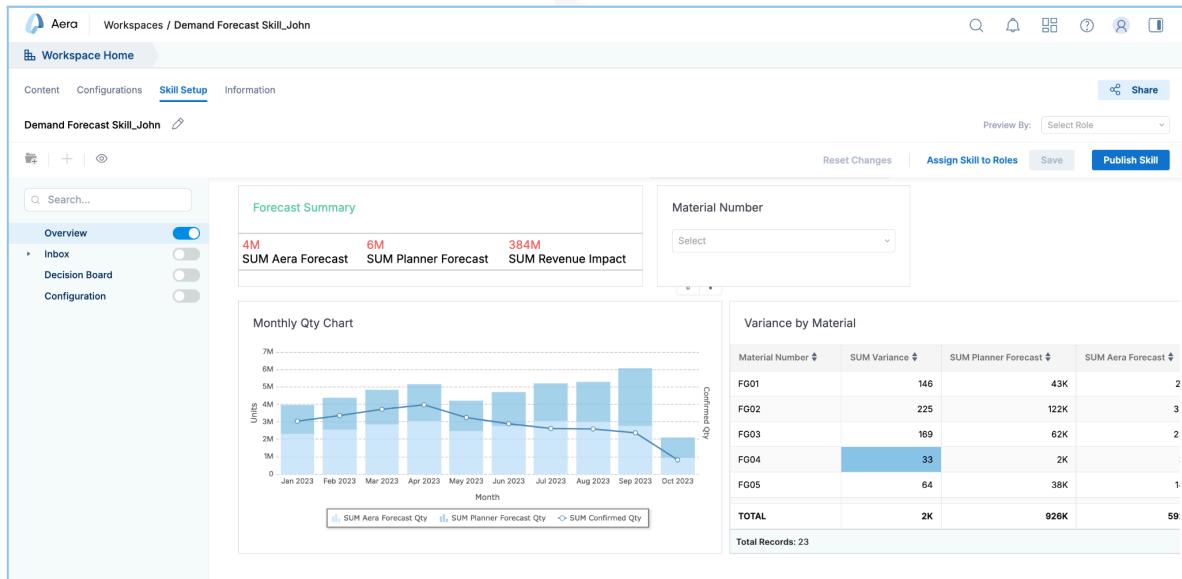
Discovery_Document_JohnDoe (Sheet1)

Role*

Developer, Skill Builder Role

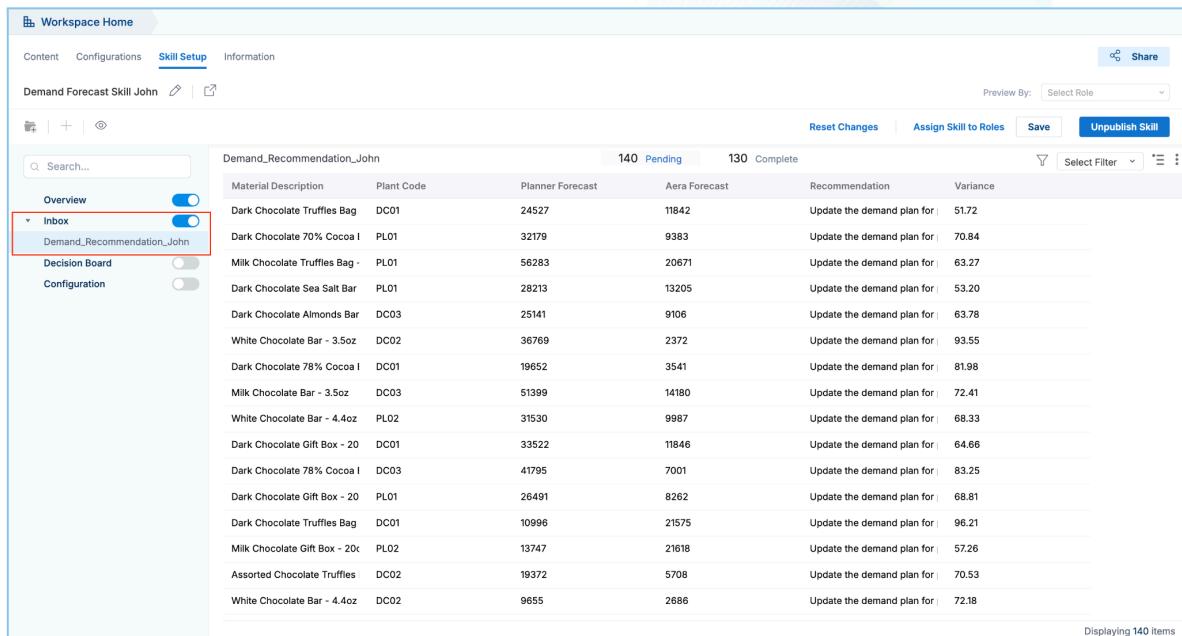
Save

12. Click **Save**, and the **Discovery Sheet** will be displayed in the Skill Setup Tab.



The screenshot shows the Aera Demand Forecast Skill Setup page. At the top, there's a navigation bar with 'Content', 'Configurations', 'Skill Setup' (which is selected), and 'Information'. Below the navigation is a search bar and a sidebar with toggle buttons for 'Overview', 'Inbox' (which is selected and highlighted in blue), 'Decision Board', and 'Configuration'. The main content area includes a 'Forecast Summary' section with three bars: 'SUM Aera Forecast' (4M), 'SUM Planner Forecast' (6M), and 'SUM Revenue Impact' (384M). To the right is a 'Material Number' dropdown and a 'Variance by Material' table. The table has columns for Material Number, SUM Variance, SUM Planner Forecast, and SUM Aera Forecast. It lists items like FG01, FG02, FG03, FG04, FG05, and a total row. The bottom right of the table shows 'Total Records: 23'. In the center is a 'Monthly Qty Chart' showing forecasted quantities from January to October 2023.

13. Enable the **Inbox** toggle button located on the left navigation panel.
14. By default, all **categories** in the skill will be displayed in the Skill Setup Tab.



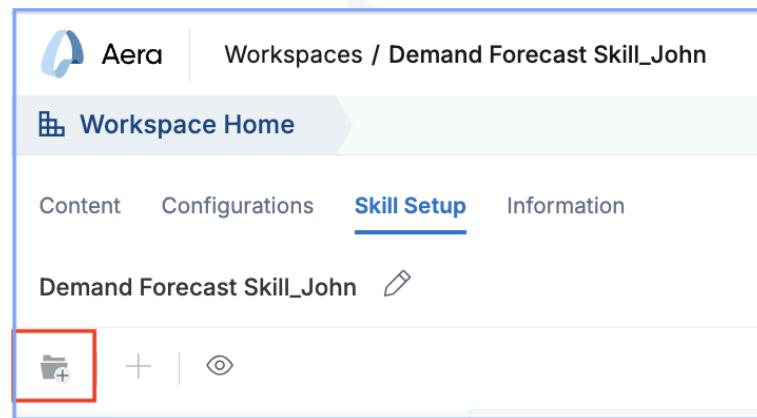
The screenshot shows the Aera Skill Setup page for 'Demand Forecast Skill_John'. The navigation bar includes 'Content', 'Configurations', 'Skill Setup' (selected), and 'Information'. The sidebar has toggle buttons for 'Overview', 'Inbox' (selected and highlighted in red), 'Demand_Recommendation_John', 'Decision Board', and 'Configuration'. The main content area displays a table of tasks or objects. The table has columns for Material Description, Plant Code, Planner Forecast, Aera Forecast, Recommendation, and Variance. It lists various chocolate products like Dark Chocolate Truffles Bag, Milk Chocolate Truffles Bag, etc. At the bottom right of the table, it says 'Displaying 140 items'.

The names of the objects are retained to help learners identify the types of objects that can be configured on a Skill Navigation Page.

It is suggested that the navigation pane labels and folders are named to provide the context and objective of each section in a Skill.

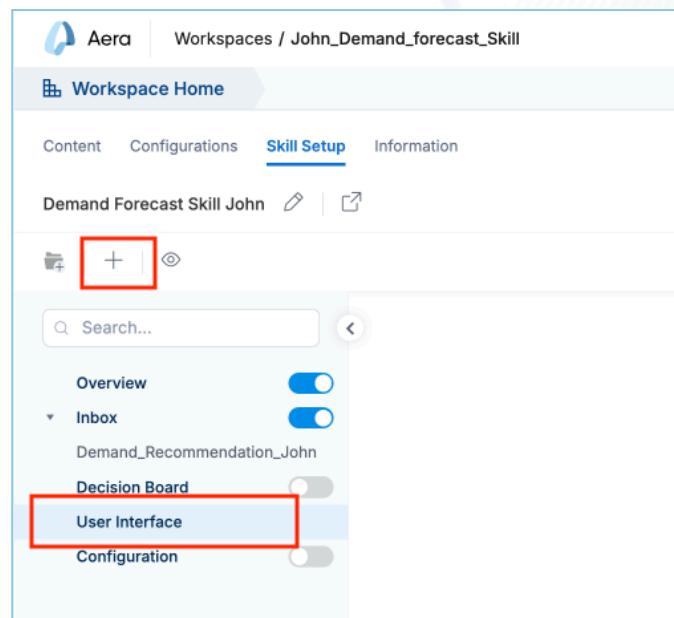
Add New Page

1. Next, create a folder to display the UI created using Process Builder.
2. Click on **+ Create Folder**.



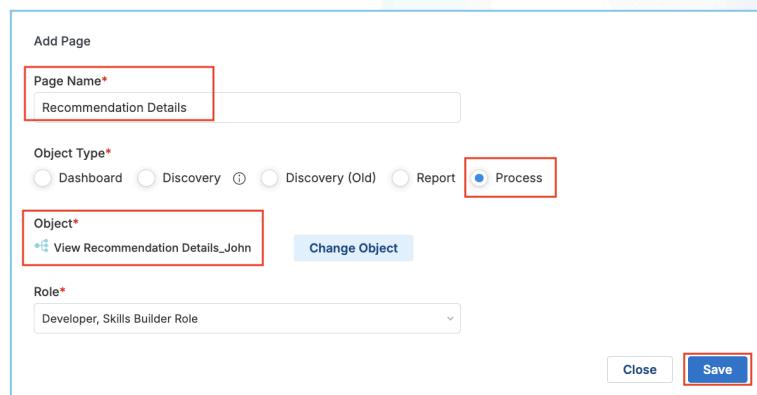
The screenshot shows the Aera Skill Setup interface for a workspace named "Demand Forecast Skill_John". The "Skill Setup" tab is selected. Below the tab, there is a section titled "Demand Forecast Skill_John" with a pencil icon. At the bottom of this section, there is a row of icons: a folder icon (with a red box around it), a plus sign icon, and an eye icon.

- Enter the name **User Interface** and click **+** to add a **New Page**.

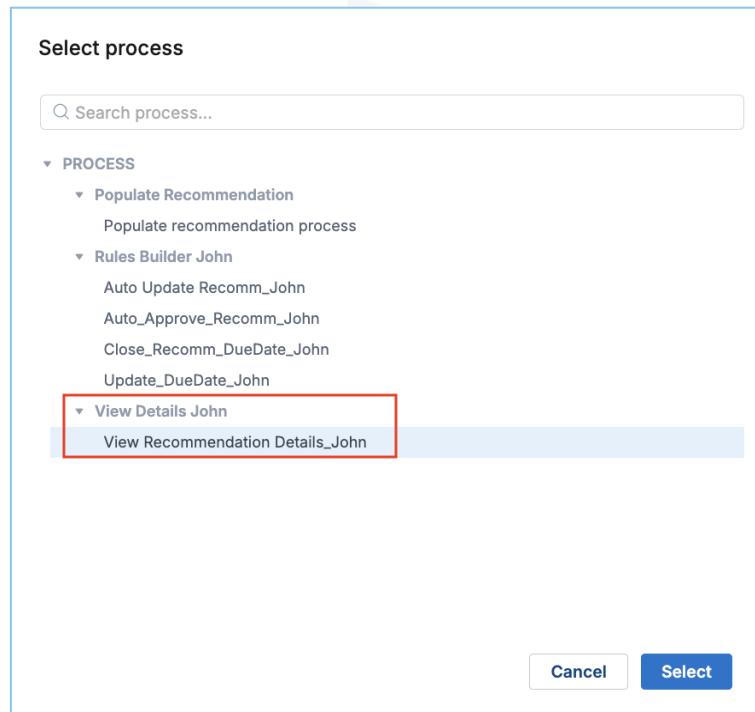


The screenshot shows the Aera Skill Setup interface for a workspace named "John_Demand_forecast_Skill". The "Skill Setup" tab is selected. Below the tab, there is a section titled "Demand Forecast Skill John" with a pencil icon. At the bottom of this section, there is a row of icons: a folder icon, a plus sign icon (with a red box around it), and an eye icon. Below these icons, there is a search bar labeled "Search...". Underneath the search bar, there is a list of items with toggle switches: "Overview" (on), "Inbox" (on), "Demand_Recommendation_John" (off), "Decision Board" (off), "User Interface" (with a red box around it and on), and "Configuration" (off).

- Enter the page name as **Recommendation Details** and select the object type as **Process**.
- Select the object as the process you created in the **Process Builder** hands-on exercise. Click **Save**.

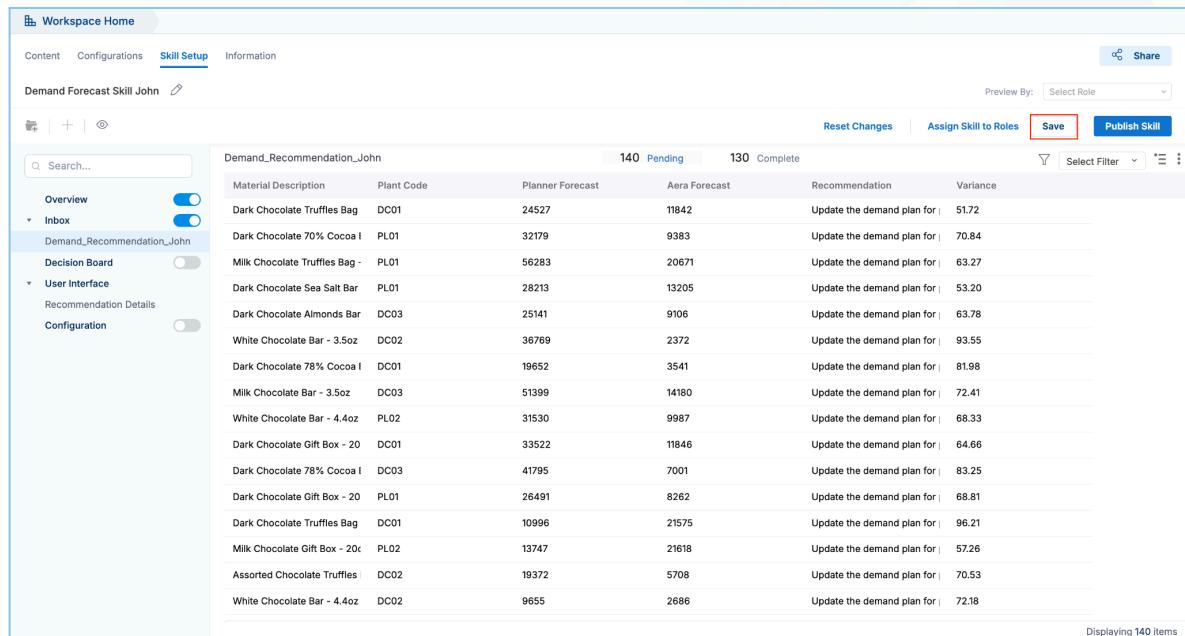


The screenshot shows the "Add Page" dialog box. The "Page Name*" field contains "Recommendation Details" (with a red box around it). The "Object Type*" section has several radio buttons: "Dashboard" (unselected), "Discovery" (unselected), "Discovery (Old)" (unselected), "Report" (unselected), and "Process" (selected, with a red box around it). The "Object*" field contains "View Recommendation Details_John" (with a red box around it) and a "Change Object" button. The "Role*" field contains "Developer, Skills Builder Role". At the bottom right of the dialog box are two buttons: "Close" and "Save" (highlighted with a red box).



You can add more pages to display more than one report/chart/table.

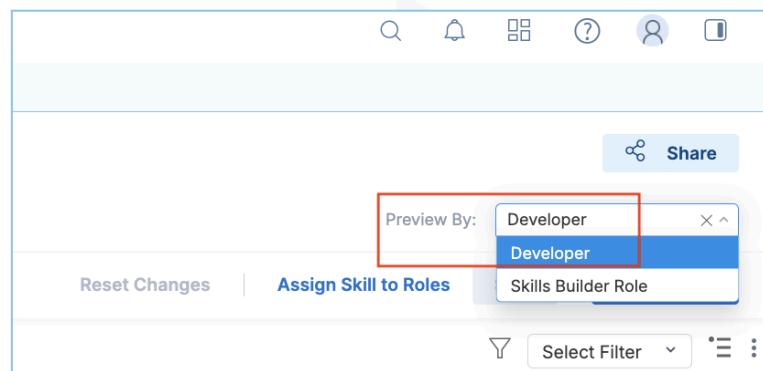
6. Click on the Save button located in the top right corner.



Demand Forecast Skill John

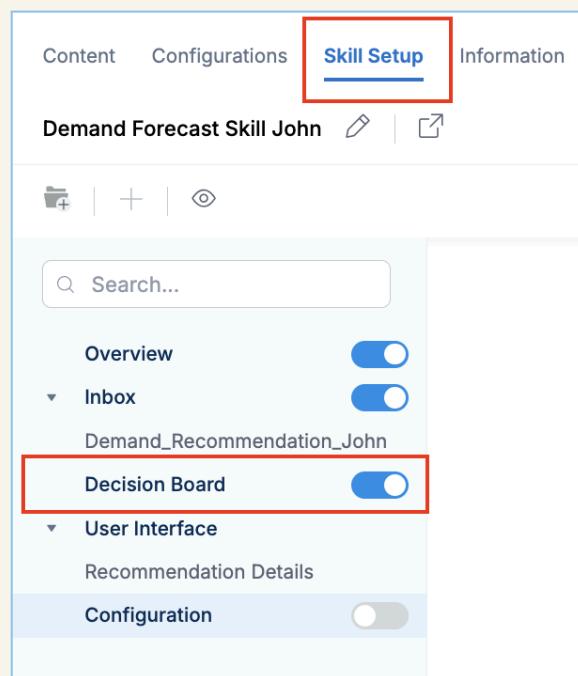
Material Description	Plant Code	Planner Forecast	Aera Forecast	Recommendation	Variance
Dark Chocolate Truffles Bag	DC01	24527	11842	Update the demand plan for	51.72
Dark Chocolate 70% Cocoa I	PL01	32179	9383	Update the demand plan for	70.84
Milk Chocolate Truffles Bag -	PL01	56283	20671	Update the demand plan for	63.27
Dark Chocolate Sea Salt Bar	PL01	28213	13205	Update the demand plan for	53.20
Dark Chocolate Almonds Bar	DC03	25141	9106	Update the demand plan for	63.78
White Chocolate Bar - 3.5oz	DC02	36769	2372	Update the demand plan for	93.55
Dark Chocolate 78% Cocoa I	DC01	19652	3541	Update the demand plan for	81.98
Milk Chocolate Bar - 3.5oz	DC03	51399	14180	Update the demand plan for	72.41
White Chocolate Bar - 4.4oz	PL02	31530	9987	Update the demand plan for	68.33
Dark Chocolate Gift Box - 20	DC01	33522	11846	Update the demand plan for	64.66
Dark Chocolate 78% Cocoa I	DC03	41795	7001	Update the demand plan for	83.25
Dark Chocolate Gift Box - 20	PL01	26491	8262	Update the demand plan for	68.81
Dark Chocolate Truffles Bag	DC01	10996	21575	Update the demand plan for	96.21
Milk Chocolate Gift Box - 20c	PL02	13747	21618	Update the demand plan for	57.26
Assorted Chocolate Truffles	DC02	19372	5708	Update the demand plan for	70.53
White Chocolate Bar - 4.4oz	DC02	9655	2686	Update the demand plan for	72.18

7. Choose "Developer" in the preview by drop-down to check and tweak how the skill navigation appears in each role.



The steps below for enabling the Decision Board are for review purposes only. You will not be implementing this as part of your Hands-on exercise.

Optionally, you can also enable the Decision Board option for your skill from the Skill Setup tab. Once enabled, you will be able to get an overview and in-depth understanding of the Skills performance on the Decision Board. Here, you can view total and open recommendations and their associated activities, such as acceptance rates and their impact on key business metrics. To enable, simply toggle the Decision Board button from the left navigation panel, and now the skill will be part of the Decision Board analysis.

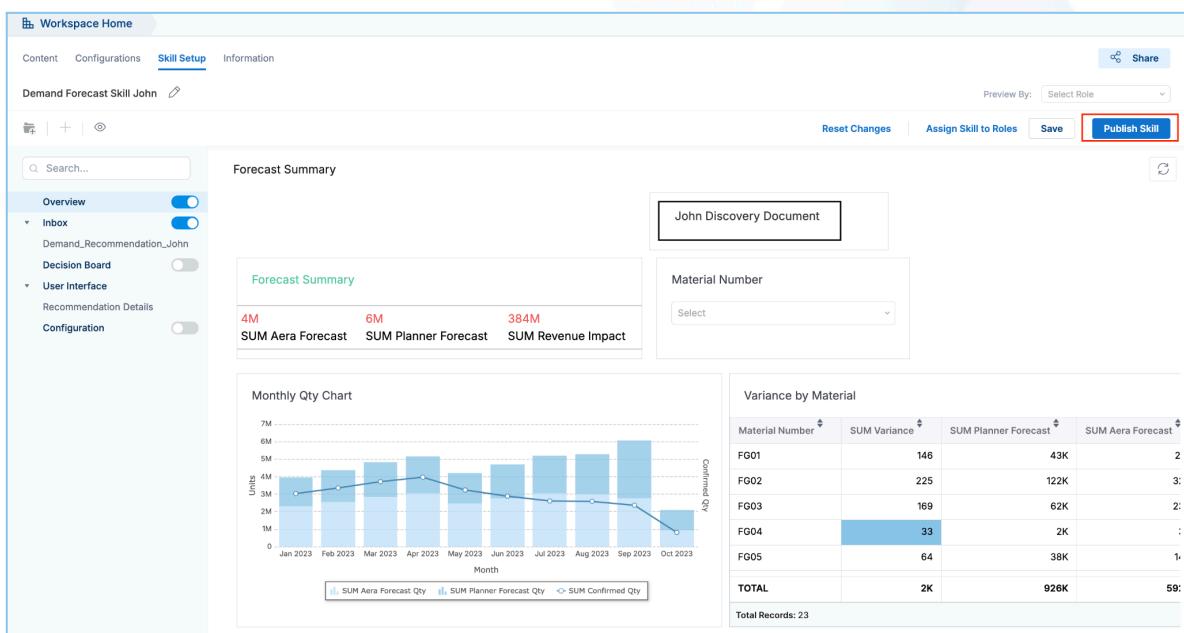


You can access the Decision Board through a skill card or in the Skills section of the Control Room.



Publishing the Skill

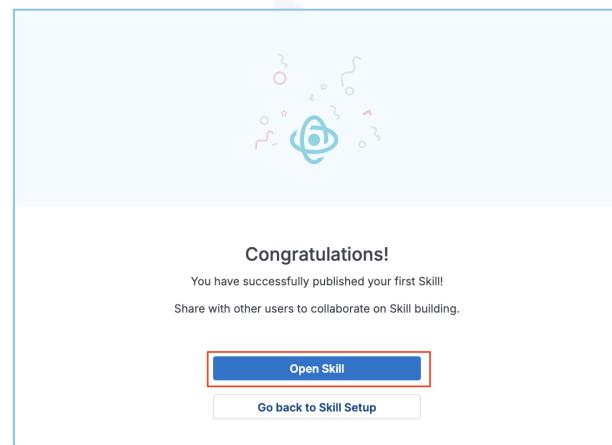
- From the Skill Setup, click on **Publish Skill**.



The screenshot shows the Workspace Home page with the 'Skill Setup' tab selected. The left sidebar includes sections for Content, Configurations, Skill Setup (selected), and Information. The main area contains the following components:

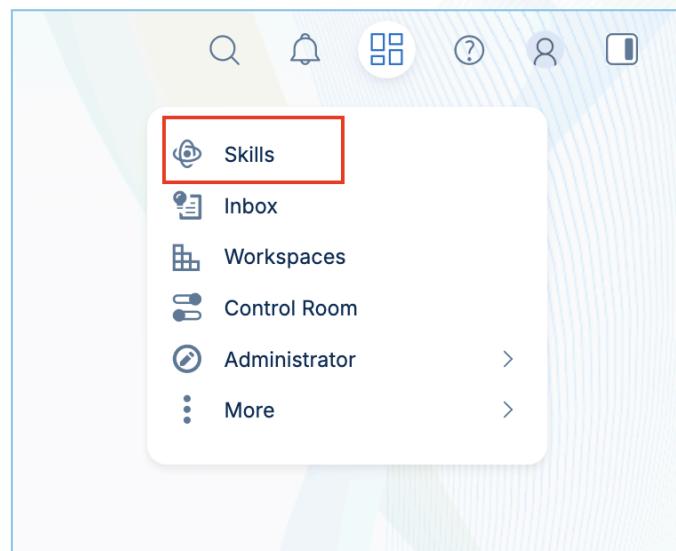
- Forecast Summary:** Displays 4M SUM Aera Forecast, 6M SUM Planner Forecast, and 384M SUM Revenue Impact.
- Monthly Qty Chart:** A bar chart from Jan 2023 to Oct 2023 showing SUM Aera Forecast Qty, SUM Planner Forecast Qty, and SUM Confirmed Qty.
- Variance by Material:** A table showing variance data for FG01, FG02, FG03, FG04, FG05, and a total row.
- Configuration Options:** Includes Overview, Inbox, User Interface, Recommendation Details, and Configuration.
- Buttons:** Share, Reset Changes, Assign Skill to Roles, Save, and Publish Skill (highlighted with a red box).

- Click on **Open Skill** to view the skill you have configured.

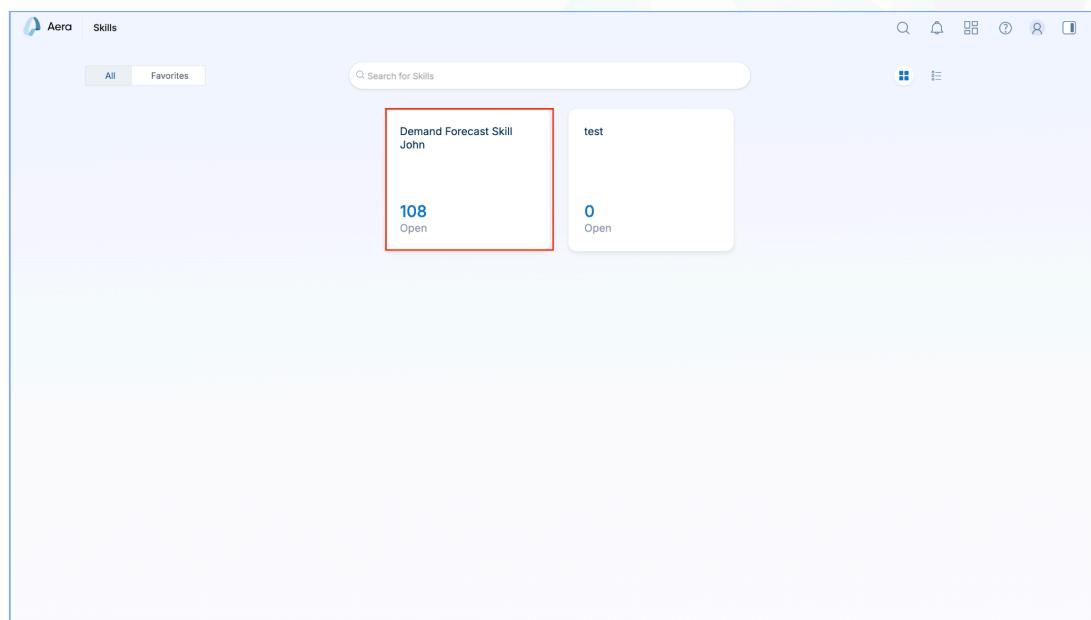


View the Skill

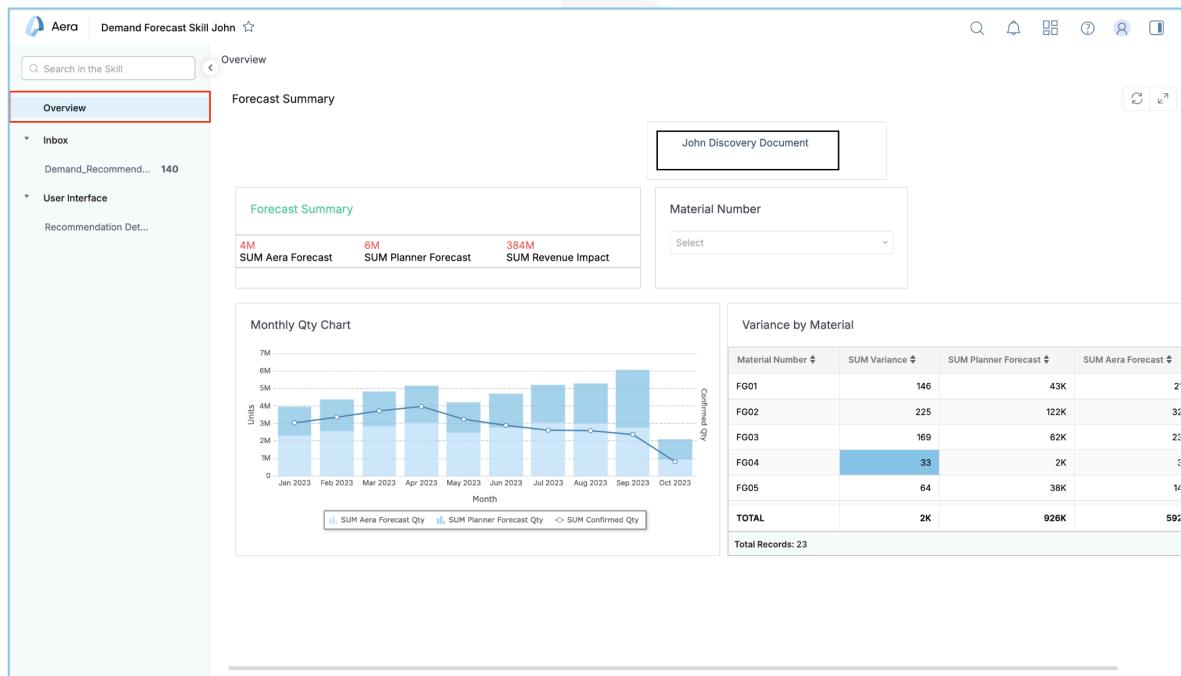
- From the home page, click on the menu icon and select **Skills**.



- The **Demand Forecast Skill** opens and displays the objects as you configured them.

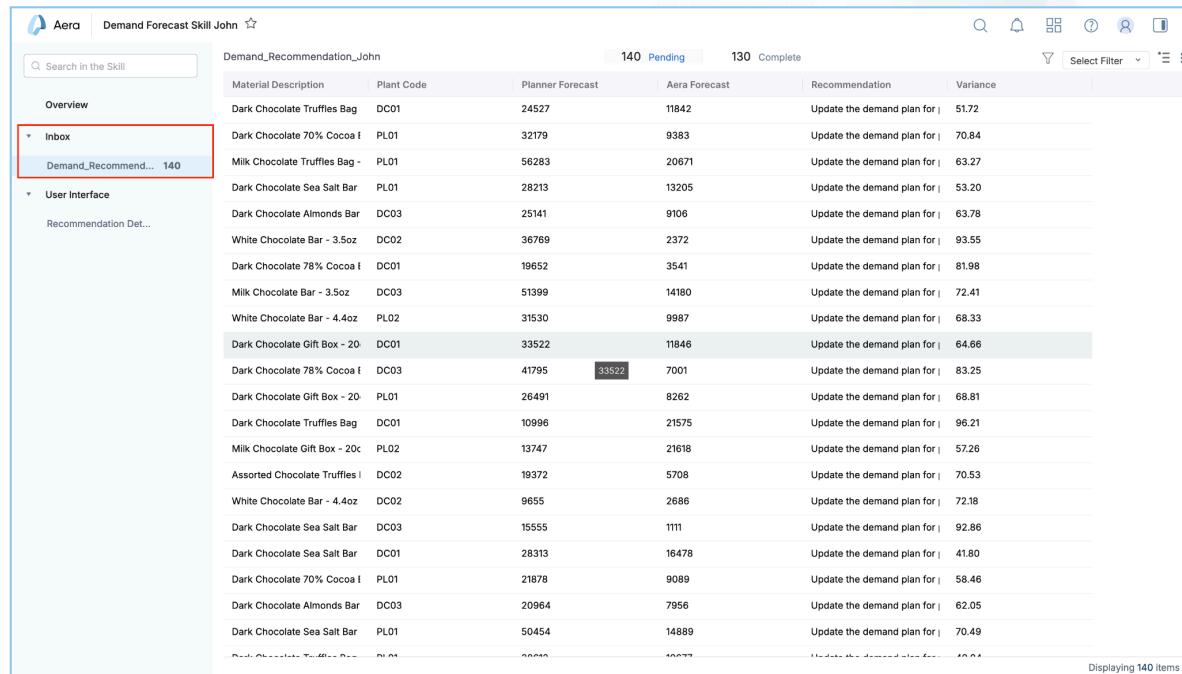


3. The landing page will be the **Discovery sheet** configured for the **Overview** tab.



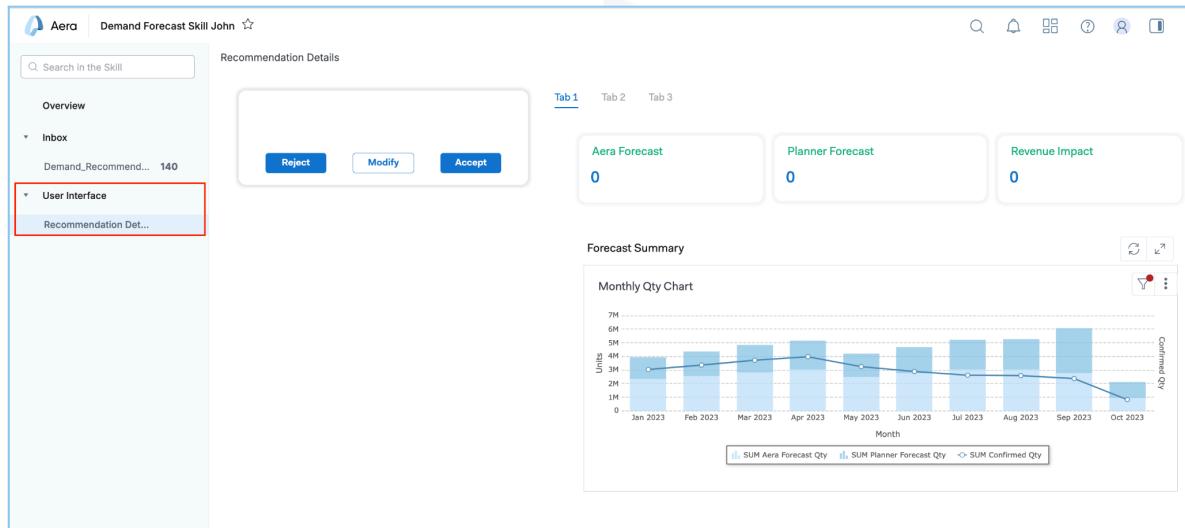
Material Number	SUM Variance	SUM Planner Forecast	SUM Aera Forecast
FG01	146	43K	2
FG02	225	122K	32
FG03	169	62K	25
FG04	33	2K	1
FG05	64	38K	14
TOTAL	2K	928K	592

4. Next, click on the **Inbox** and **decision board** to see the details.



Material Description	Plant Code	Planner Forecast	Aera Forecast	Recommendation	Variance
Dark Chocolate Truffles Bag	DC01	24527	11842	Update the demand plan for	51.72
Dark Chocolate 70% Cocoa I	PL01	32179	9383	Update the demand plan for	70.84
Milk Chocolate Truffles Bag -	PL01	56283	20671	Update the demand plan for	63.27
Dark Chocolate Sea Salt Bar	PL01	28213	13205	Update the demand plan for	53.20
Dark Chocolate Almonds Bar	DC03	25141	9106	Update the demand plan for	63.78
White Chocolate Bar - 3.5oz	DC02	36769	2372	Update the demand plan for	93.55
Dark Chocolate 78% Cocoa I	DC01	19652	3541	Update the demand plan for	81.98
Milk Chocolate Bar - 3.5oz	DC03	51399	14180	Update the demand plan for	72.41
White Chocolate Bar - 4.4oz	PL02	31530	9987	Update the demand plan for	68.33
Dark Chocolate Gift Box - 20	DC01	33522	11846	Update the demand plan for	64.66
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Milk Chocolate Gift Box - 20c	PL02	13747	21618	Update the demand plan for	57.26
Assorted Chocolate Truffles I	DC02	19372	5708	Update the demand plan for	70.53
White Chocolate Bar - 4.4oz	DC02	9655	2686	Update the demand plan for	72.18
Dark Chocolate Sea Salt Bar	DC03	15555	1111	Update the demand plan for	92.86
Dark Chocolate Sea Salt Bar	DC01	28313	16478	Update the demand plan for	41.80
Dark Chocolate 70% Cocoa I	PL01	21878	9089	Update the demand plan for	58.46
Dark Chocolate Almonds Bar	DC03	20964	7956	Update the demand plan for	62.05
Dark Chocolate Sea Salt Bar	PL01	50454	14889	Update the demand plan for	70.49

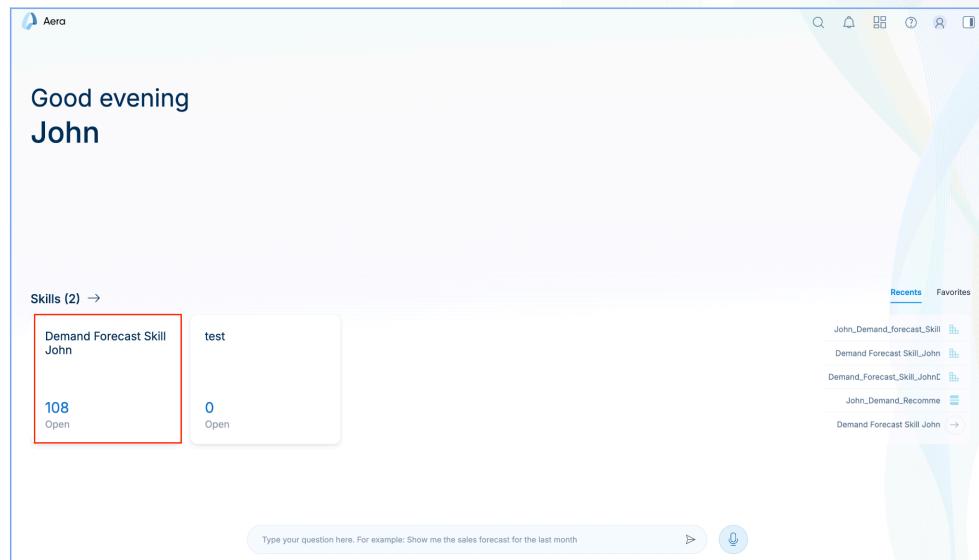
5. The **Recommendation Details** will display the UI you created.



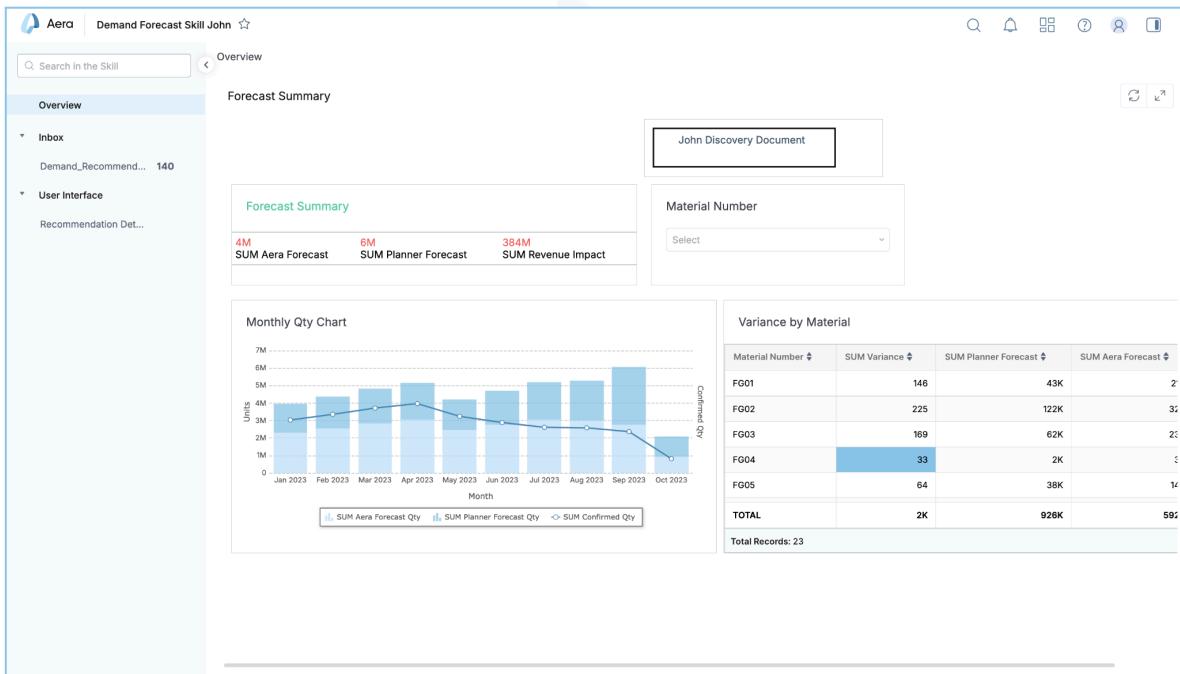
The screenshot shows the Aera Demand Forecast Skill interface. On the left, there's a sidebar with 'Overview' and 'Inbox' sections, and a red box highlights the 'User Interface' section under 'Inbox'. In the main area, there's a 'Recommendation Details' panel with three buttons: 'Reject', 'Modify', and 'Accept'. Below it are three cards: 'Aera Forecast' (0), 'Planner Forecast' (0), and 'Revenue Impact' (0). At the bottom is a 'Forecast Summary' section with a 'Monthly Qty Chart' showing units from Jan 2023 to Oct 2023. The chart has three series: SUM Aera Forecast Qty (blue bars), SUM Planner Forecast Qty (light blue bars), and SUM Confirmed Qty (green line with dots).

When the UI object is added directly to the UI section, its labels initially display blank values. However, when the same UI object is invoked through a process, it displays the actual values based on the Action Message ID referenced in the process.

6. The final expected outcome is shown below, and it needs to be uploaded as the end result.



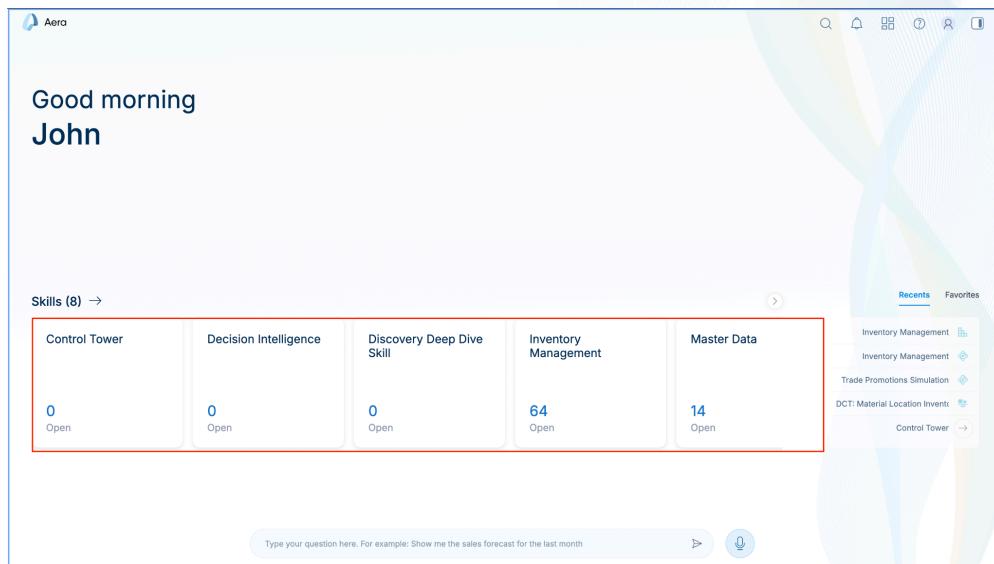
The screenshot shows the Aera interface with a greeting 'Good evening John'. Below it, there's a 'Skills (2) →' section. The first skill, 'Demand Forecast Skill John', has a red box around it and shows '108 Open'. The second skill, 'test', shows '0 Open'. On the right, there's a sidebar with 'Recent' and 'Favorites' tabs, and a list of recent items including 'John_Demand_forecast_Skill', 'Demand Forecast Skill John', 'Demand_Forecast_Skill_JohnC', 'John_Demand_Recomm...', and 'Demand Forecast Skill John'. At the bottom is a search bar with placeholder text 'Type your question here. For example: Show me the sales forecast for the last month'.



The screenshot shows the Aera Demand Forecast Skill interface. On the left, there's a sidebar with 'Overview' and sections for 'Inbox' (Demand_Recommend... 140) and 'User Interface' (Recommendation Det...). The main area has three main sections: 'Forecast Summary' (with metrics: 4M SUM Aera Forecast, 6M SUM Planner Forecast, 384M SUM Revenue Impact), 'Monthly Qty Chart' (a bar chart from Jan 2023 to Oct 2023 showing forecast vs. actual), and 'Variance by Material' (a table comparing material numbers, variance, and forecasts).

Material Number	SUM Variance	SUM Planner Forecast	SUM Aera Forecast
FG01	146	43K	2
FG02	225	122K	32
FG03	169	62K	23
FG04	33	2K	1
FG05	64	38K	14
TOTAL	2K	926K	595

An end user can view one or more skill cards on the home page based on the permissions assigned.



The screenshot shows the Aera Skills navigation page. It features a greeting 'Good morning John' and a section titled 'Skills (8) →' with cards for Control Tower (0 Open), Decision Intelligence (0 Open), Discovery Deep Dive Skill (0 Open), Inventory Management (64 Open), and Master Data (14 Open). A sidebar on the right lists 'Recent' skills: Inventory Management, Trade Promotions Simulation, DCT: Material Location Invent, and Control Tower.

SUMMARY

In this hands-on exercise, we have:

- Configured the Skills navigation page.
- Provided necessary roles and permissions.
- Published the Skill.

"Congratulations! You have successfully built a Skill on Aera Decision Cloud."