**SIEBEL FORECAST**

**Version: 1.1**

**By**

**SIEBEL Team**

Revision History

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Version No.** | **Issue date** | **Name of the creator/modifier** | **Description of Changes** | **Location (Page, Para / Sec. Nos)** |
| 1.0 | 01/03/2011 | Angira Sinha | Initial Release | New document |
| 1.1 | 04/05/2011 | Angira Sinha | Added more information, Participant Forecast job level details. |  |

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## 

## High Level Overview

Sales Bookings Forecast is entered by the Sales Field in Siebel CE (**C**ustomer **E**dge) at different levels (Sales Rep, Team, District, Region, Multi-Region, Area, Multi-Area, Geo and Worldwide). It is required to **integrate eBI with Forecast in Siebel at ALL Levels** so that meaningful analytics can be performed on forecast data.

Forecast was currently pulled from SMART in eBI. This information was currently available at Sales Area level. This provided visibility only to the WW, Geo and Area level Forecasts (Weekly/Monthly/Quarterly). Using the data from SMART and leveraging existing processes for Forecast hinders eBI in providing meaningful forecast related **trending capabilities** to the users.

### *Project Description*

The objective of this project is to enable eBI to pull Forecast at all levels from Siebel and provide useful metrics to sales users using this information. It will be required to enhance some of the existing dashboards once this data becomes available in eBI.

### *Project Benefits*

* This project will enable a true parallel run between SMART and Siebel Forecast.
* This would enable eBI to change the source of forecast from SMART to Siebel and thereby reduce manual effort required towards maintenance and support of the manual process that provides the forecast in SMART.
* Last, but not the least, this project will help eliminate the manual efforts required by the Geos in submitting their forecast on a spreadsheet.

**This project was released in 2 phases** –

1. Siebel Forecast Phase I

2. Siebel Dot Release – Enhancement based on business requirement and FY11 history load was done in this release.

*P.N – FY11 History load was again done as part of a change request after DIMS.SALES\_TERRITORY\_TV and DIMS.SALES\_TERRITORY\_HIERARCHY fix.*

## 

## ETL Design

In Siebel Forecast Phase I, the entire design was encapsulated to bring the forecasts from source into eBI.

### *Source Tables*

* SIEBEL.S\_USER
* SIEBEL.S\_POSTN
* SIEBEL.S\_BU
* SIEBEL.S\_PERIOD
* SIEBEL.S\_ORG\_EXT
* SIEBEL.S\_FCST - **Main driving table**
* SIEBEL.S\_FCSTSER\_DATE
* SIEBEL.S\_FCSTSER
* SIEBEL.S\_FCST\_FCSTITEM
* SIEBEL.S\_FCST\_ITEM\_DTL

### *Target Tables*

Below are the Fact Tables related to Siebel Forecast in EDWNI –

* **FACTS.SALES\_PARTICIPANT\_FORECAST** – captures Sales Rep forecasts.
* **FACTS.SALES\_TERRITORY\_FORECAST\_SB –** captures 8 level Territory (Team, District, Region, Multi-Region, Area, Multi-Area, Geo, and Worldwide) forecasts.

### *ETL Load*

Data gets loaded in the fact tables from source using two processes –

* Daily Incremental – 9.30 PM PST daily.
* 2 hour refresh Incremental – (6.00 AM, 8.00 AM, 10.00 AM, 12.00 PM and 2.00 PM PST) on Monday and Thursday.

For Daily Incremental, we used the Standard eBI process in ETL i.e. Source to Stage, Stage to Work and Work to EDW. Siebel Replica (**R1SIEB7**) is used to extract data from source.

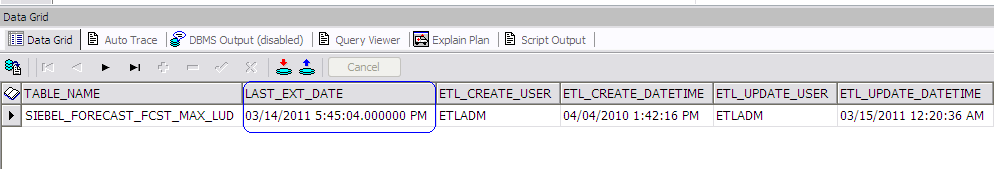
For 2 Hour refresh Incremental, Siebel Live production instance (**PSIEB7**) is used in ETL to execute the incremental query directly in Source.

### *Control Tables*

* ETL.SIEBEL\_FORECAST\_FCST\_MAX\_LUD – Extraction control table used to fetch incremental data.

*P.N – This control table doesn’t get updated during 2 hour refresh incremental load. It only gets updated during daily incremental load with the below value:*

*SELECT max(Last\_Upd) AS Last\_Upd FROM STG\_SIEBEL.S\_FCST*

**

* ETL.EDWNI\_REFRESH\_CTL – This control table is used to display REFRESH\_DATE in the dashboard.

*P.N – This table is not used for reporting purpose now.*

### *Source Query*

Find the source queries attached –





* Filtering by position Type = ‘SR’ in source gives Rep Level forecasts.
* Filter by position Type in ('WW','DM','AD','RD','VP') in source gives Territory level forecasts.

### *List of jobs*

Find the list of jobs and sequences in the attached spreadsheet –



### *High Level Data Flow*

**EDWNI Stage to Work**

* Master Data Lookup & Key Substitution,
* Currency Conversion,
* Terr Hier Rollup , Assign Forecast at Other Levels
* House Account Calculation

Siebel-CE

FCST

SMART (Territory + Rep master Data)

Master Tables

Data in

Stg Tables

EDWNI\_STAGING (SMART)

EDWNI\_STAGING (SIEBEL)

EDWNI \_ Dimensions (Sales Participant, Sales territory TV & HIER, Calendar, ISO Currency, Currency Conversion Rate)

TERR FCST

REP FCST

Load

Rep Level Fact

EDWNI WORK TARGETS

Load

Territory Level Fact

**In Scope**

**Already Exists**

## Submitted and Rollup Forecasts

Forecasts are submitted in CE on the basis of Weekly and Monthly forecasts.

Forecasts that are extracted directly from source and propagated till the fact table are termed as ‘SUBMITTED’ forecasts.

In some levels like Team or Multi-Region, forecasts are not directly available in source. Forecast are made available by rolling up from the appropriate level at which data is submitted. These are termed as ‘ROLLUP’ forecasts.

### *Example of Rollup calculation*

Data in Region level –

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| MADE\_ON\_DATE\_KEY | MADE\_FOR\_START\_DATE\_KEY | MADE\_FOR\_PERIOD\_CODE | PARENT\_TERRITORY\_KEY | LC\_FORECAST\_AMOUNT |
| 109269 | 109332 | M | 720 | 445000 |
| 109269 | 109332 | M | 720 | 1141567.68 |
| 109269 | 109332 | M | 720 | 5500000 |
|  |  |  |  | 7086567.68 |

Data in Multi-Region level –

Sum (child forecast) is loaded as Parent forecast.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| MADE\_ON\_DATE\_KEY | MADE\_FOR\_START\_DATE\_KEY | MADE\_FOR\_PERIOD\_CODE | PARENT\_TERRITORY\_KEY | LC\_FORECAST\_AMOUNT |
| 109269 | 109332 | M | 720 | 7086567.68 |

Earlier in Siebel Forecast Phase 1 release, submitted forecasts were only available for **GARD (Geo, Area, Region and District)** level. For **non-GARD level (WW, Multi-Area, Multi-Region and Team)** Rollup forecasts were available.

Stage

Forecast

Rep Level

GARD Level

Territory Forecast

SMART

Siebel

SMART

Work

Rep Level Forecast

Territory Level Forecast

GARD

Fact

Fact

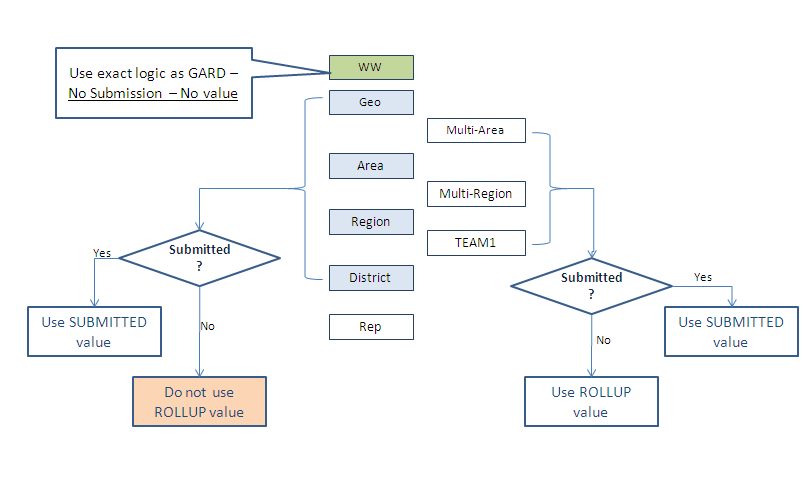
EDWNI

Sources

But now after the **2nd release** (Siebel Dot Release), submitted forecasts are available for the entire 8 levels.

However, rollup forecasts are applicable only for Team, Multi-Region and Multi-Area using the below scenarios –

* If a node does not have a submitted forecast but has a rolled up forecast due to submissions at lower level, move ‘ROLLUP’ record to fact table
* If a node has only submitted forecast, but no rollup value as children did not submit, move the submitted record to fact table
* If a node has BOTH submitted record from Siebel CE, and rollup value form child submissions, move ONLY the ‘SUBMITTED’ value to fact table
* If a node on Day 1 has submitted forecast and no rollup, but on day 2 rollup forecast exists, the Submitted record should remain untouched in fact table, once in submitted status, only a new submitted status record should update it.



### *8 level Territory Hierarchy*

Worldwide

|

Geo

|

Multi-Area

|

Area

|

Multi-Region

|

Region

|

District

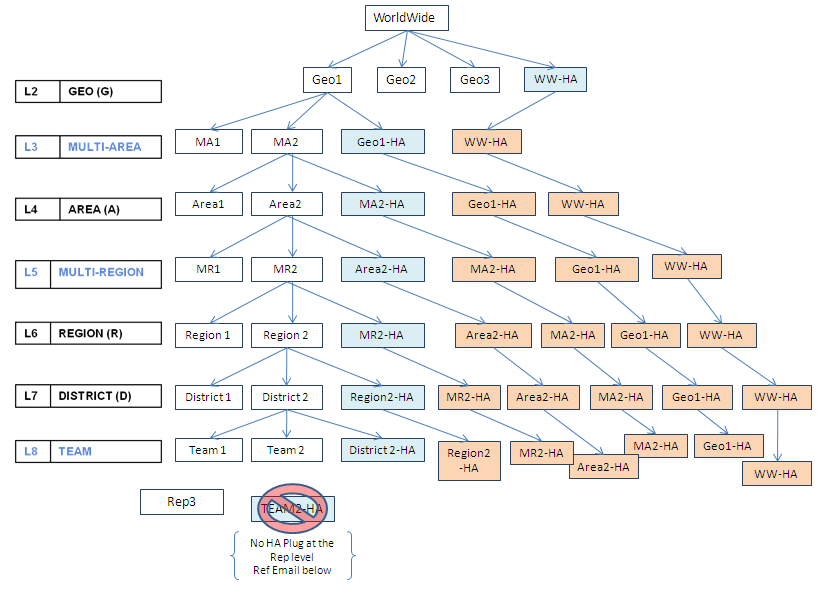
|

Team

|

Sales Rep

## House Account



**HA Plug for any Made\_On and Made\_for combination = Parent forecast – sum (child forecast)**

The HA plug for each level will occur at one level below the parent down till the TEAM level. There is no HA Plug for the TEAM level. For e.g., the HA Account for the WW level will be at the GEO level, the HA Account for GEO will be at the Multi-Area level and so on.

In addition to computing the HA amount for each node [WW, GEO, MA, A, MR, R and D], each HA account will have corresponding nodes at each level. The same HA amount needs to be populated across all the nodes rolling up to the HA account until the TEAM level.

### *House Account Calculation Example*

* Submitted Forecast from Siebel at Region Level

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. **REGION** | 1. **MADE FOR DATE** | 1. **MADE ON DATE** | 1. **FILER\_AMT** | 1. **SOURCE SYSTEM** |
| 1. R1 | 1. JAN FY10 | 1. DEC 22 2009 | 1. 100 | 1. SIEBEL |
| 1. R2 | JAN FY10 | DEC 22 2009 | 1. 100 | 1. SIEBEL |
| 1. R3 | JAN FY10 | DEC 22 2009 | 1. 100 | 1. SIEBEL |

* District Level Forecast from Siebel

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. DISTRICT | 1. MADE FOR DATE | 1. MADE ON DATE | 1. FILER AMT | 1. SOURCE |
| 1. D11 | 1. JAN FY10 | 1. DEC 22 2009 | 1. 35 | 1. SIEBEL |
| 1. D12 | 1. JAN FY10 | 1. DEC 22 2009 | 1. 35 | 1. SIEBEL |
| 1. D21 | 1. JAN FY10 | 1. DEC 22 2009 | 1. 45 | 1. SIEBEL |
| 1. D22 | 1. JAN FY10 | 1. DEC 22 2009 | 1. 45 | 1. SIEBEL |
| 1. D30 | 1. JAN FY10 | 1. DEC 22 2009 | 1. 90 | 1. SIEBEL |

* Region Level Forecast Rolled up from District level (B)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. REGION | 1. MADE FOR DATE | 1. MADE ON DATE | 1. FILER AMT | 1. SOURCE |
| 1. R1 | 1. JAN FY10 | 1. DEC 22 2009 | 1. 70 | 1. SIEBEL |
| 1. R2 | 1. JAN FY10 | 1. DEC 22 2009 | 1. 90 | 1. SIEBEL |
| 1. R3 | 1. JAN FY10 | 1. DEC 22 2009 | 1. 90 | 1. SIEBEL |

1. For Same Region, Made For Date, Made On Date, Subtract Filer AMT between (A) and (C)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. REGION | 1. MADE FOR DATE | 1. MADE ON DATE | 1. FILER AMT DIFERENCE | 1. SOURCE |
| 1. R1 | 1. JAN FY10 | 1. DEC 22 2009 | 1. 30 | 1. EDWNI |
| 1. R2 | 1. JAN FY10 | 1. DEC 22 2009 | 1. 10 | 1. EDWNI |
| 1. R3 | 1. JAN FY10 | 1. DEC 22 2009 | 1. 10 | 1. EDWNI |

E. Create Lookup between Region House Account (District Level) and Region

|  |  |
| --- | --- |
| 1. Region House Acct ( District Level) | 1. Region |
| 1. R1 HA | 1. R1 |
| 1. R2 HA | 1. R2 |
| 1. R3 HA | 1. R3 |

F. Lookup (D) with E with Region as lookup key column and Assign Filer Amount Difference to Region House Account (District Level) and load to table

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| DISTRICT | MADE FOR DATE | MADE ON DATE | FILER AMT DIFERENCE | SOURCE |
| R1 HA | JAN FY10 | DEC 22 2009 | 30 | SIEBEL |
| R2 HA | JAN FY10 | DEC 22 2009 | 10 | SIEBEL |
| R3 HA | JAN FY10 | DEC 22 2009 | 10 | SIEBEL |

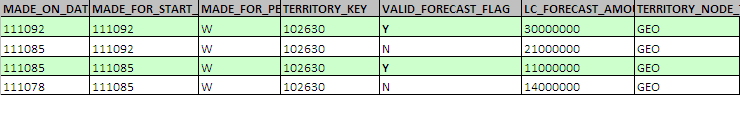
## Valid Forecast Flag

There exists a column VALID\_FORECAST\_FLAG in the Fact tables.

For any given combination of (MADE\_FOR\_START\_DATE\_KEY, MADE\_FOR\_PERIOD\_CODE, TERRITORY\_KEY and TERRITORY\_NODE\_TYPE\_CODE), there will be only one record with VALID\_FORECAST\_FLAG as ‘Y’ and i.e. record which is having **maximum** MADE\_ON\_DATE\_KEY. Rest of the records will have value as ‘N’.

To incorporate above logic, there exists a job which runs at the end of the load.

The job aggregates data on the entire table using the condition (MADE\_FOR\_START\_DATE\_KEY, MADE\_FOR\_PERIOD\_CODE, TERRITORY\_KEY and TERRITORY\_NODE\_TYPE\_CODE) and sets VALID\_FORECAST\_FLAG as ‘Y’ for **max**(MADE\_ON\_DATE\_KEY).

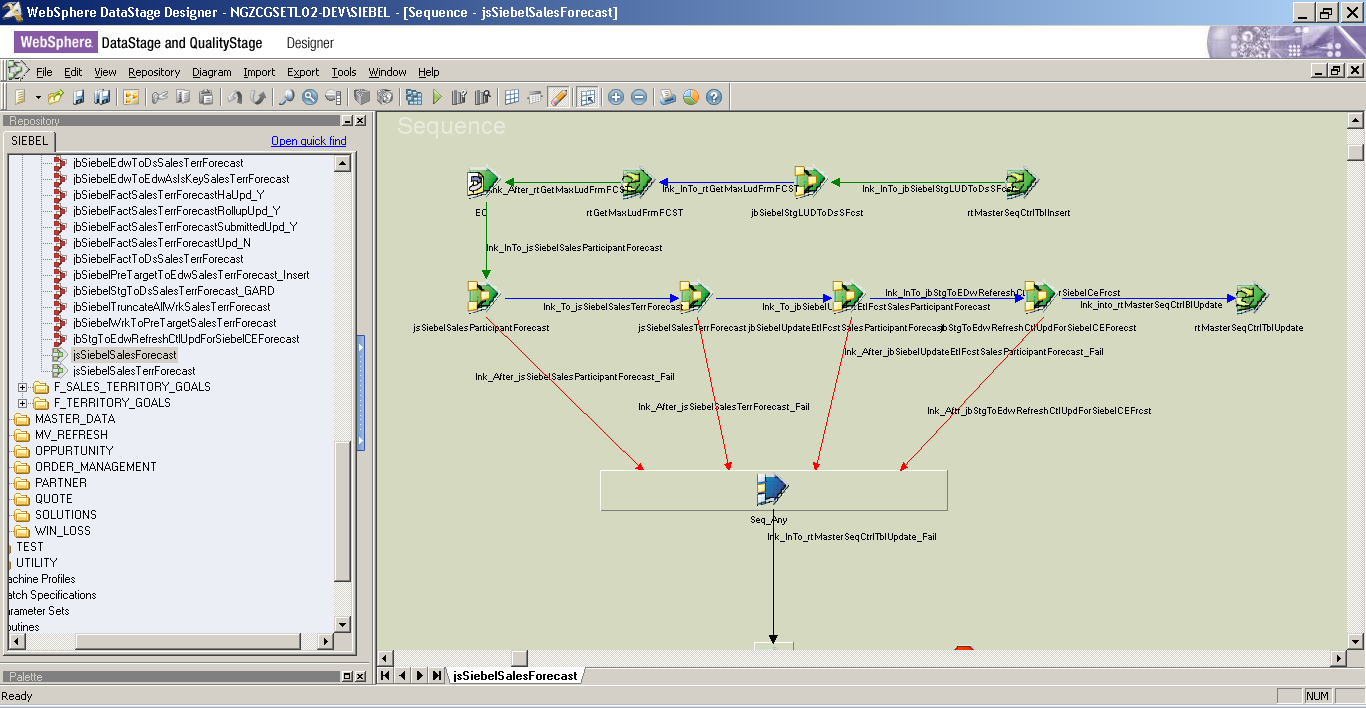


## Job Details

### *Incremental Load*

***Sequence Name*** – jsSiebelSalesForecast

***Master Sequence Name*** – msParent01



***jsSiebelSalesParticipantForecast –*** Participant forecast sequence

1. ***jbSiebelTruncateWrkSalesParticipantForecast*** – This job truncates Work table WORK.WRK\_SALES\_PRTCPT\_FORECAST.
2. ***jbSiebelStgToWrkSalesParticipantForecast –*** This job fetches data from the staging tables, transform the data according to business logic and load it in WORK.WRK\_SALES\_PRTCPT\_FORECAST table.

Source query –



Some of the important stages are as follows:

***Lookup\_66*** – Any weekly forecast record which is having Made\_For\_Date < 2 weeks or monthly forecast record with Made\_For\_Date < 1 month is not propagated further in the next stage and gets captured in the exception table ETL.SIEBEL\_FORECAST\_EXCEPTION with an exception reason as 'Elapsed Made For Period'.

***Lkp\_Week*** – MADE\_ON\_DATE\_KEY for Weekly records are derived by matching Fiscal\_Period (from source) with FISCAL\_PERIOD\_WEEK (derived using below query).

SELECT DATE\_KEY, FISCAL\_MONTH\_START\_DATE, FISCAL\_WEEK\_START\_DATE, FISCAL\_MONTH\_LONG\_TEXT, FISCAL\_WEEK\_LONG\_TEXT, FISCAL\_YEAR\_SHORT\_TEXT, FISCAL\_MONTH\_SHORT\_TEXT, FISCAL\_MONTH\_WEEK\_TEXT,

UPPER('W'||FISCAL\_WEEK\_OF\_MONTH\_NUMBER||' '||FISCAL\_MONTH\_SHORT\_TEXT||' '||FISCAL\_YEAR\_SHORT\_TEXT) AS FISCAL\_PERIOD\_WEEK

FROM DIMS.CALENDAR

WHERE FISCAL\_MONTH\_LONG\_TEXT IS NOT NULL AND FISCAL\_WEEK\_START\_DATE=BK\_CALENDAR\_DATE

AND TRUNC(BK\_CALENDAR\_DATE) >= '25-APR-2009'

***Lkp\_Month*** – MADE\_ON\_DATE\_KEY for Monthly records are derived by matching Fiscal\_Period (from source) with FISCAL\_PERIOD\_MONTH (derived using below query).

SELECT DATE\_KEY, FISCAL\_MONTH\_START\_DATE, FISCAL\_WEEK\_START\_DATE, FISCAL\_MONTH\_LONG\_TEXT, FISCAL\_WEEK\_LONG\_TEXT, FISCAL\_YEAR\_SHORT\_TEXT, FISCAL\_MONTH\_SHORT\_TEXT, FISCAL\_MONTH\_WEEK\_TEXT,

UPPER('W'||FISCAL\_WEEK\_OF\_MONTH\_NUMBER||' '||FISCAL\_MONTH\_SHORT\_TEXT||' '||FISCAL\_YEAR\_SHORT\_TEXT) AS FISCAL\_PERIOD\_WEEK,

UPPER(FISCAL\_MONTH\_SHORT\_TEXT||' '||FISCAL\_YEAR\_SHORT\_TEXT) AS FISCAL\_PERIOD\_MONTH

FROM DIMS.CALENDAR

WHERE FISCAL\_MONTH\_LONG\_TEXT IS NOT NULL AND FISCAL\_MONTH\_START\_DATE=BK\_CALENDAR\_DATE

AND TRUNC(BK\_CALENDAR\_DATE) >= '25-APR-2009'

***tfm\_system* –** Any Sales Participant with Position as ‘DEVELOPER’ does not get propagated further and gets captured in the exception table with exception reason as'Positon like DEVELOPER'.

***Lookup\_Login\_SalesParticipant\_Tv –*** SALES\_PARTICIPANT\_AT\_TRX\_KEY is derived by matching Login (from source) with EMP\_SYS\_LOGIN\_ID (using below query). TERRITORY\_KEY is also derived here but it is not propagated till the Fact table. It is only loaded in Work table for internal calculation.

SELECT a.SALES\_PARTICIPANT\_KEY AS SALES\_PARTICIPANT\_AT\_TRX\_KEY,

upper(trim(a.EMP\_SYS\_LOGIN\_ID)) AS LOGIN, a.TERRITORY\_KEY, b.TEAM\_CODE,

CASE WHEN (b.TEAM\_CODE = 'ZZ') THEN -999999

WHEN (upper(b.WORLDWIDE\_DESCRIPTION) <> upper('WW Direct Sales')) THEN -999999

WHEN (substr(b.TEAM\_DESCRIPTION,-3) = ' HA') THEN -999999

ELSE b.TEAM\_KEY

END TEAM\_KEY

FROM DIMS.SALES\_PARTICIPANT\_TV a,

DIMS.SALES\_TERRITORY\_HIERARCHY b

where a.TERRITORY\_KEY = b.TERRITORY\_KEY

and a.current\_record\_flag = 'Y'

and trunc(a.start\_date) <> nvl(trunc(a.end\_date),'30-APR-2050')

and upper(a.participant\_level\_code) <> 'HA'

***Lookup\_Login\_Sales\_Participant*** – SALES\_PARTICIPANT\_AS\_IS\_KEY is derived by matching Login (from source) with EMP\_SYS\_LOGIN\_ID (using below query).

select max(SALES\_PARTICIPANT\_KEY) as SALES\_PARTICIPANT\_AS\_IS\_KEY,

upper(EMP\_SYS\_LOGIN\_ID) AS LOGIN

from DIMS.SALES\_PARTICIPANT

where current\_record\_flag='Y'

and EMP\_SYS\_LOGIN\_ID is not null and EMP\_SYS\_LOGIN\_ID not in ('NULL','null')

and PARTICIPANT\_LEVEL\_CODE <> 'HA'

group by upper(EMP\_SYS\_LOGIN\_ID)

***Lookup\_BkCalDate –*** MADE\_FOR\_START\_DATE\_KEY is derived in this stage by matching Made\_For\_Date (from source) with BK\_CALENDAR\_DATE (using below query).

select FISCAL\_WEEK\_START\_DATE, FISCAL\_MONTH\_START\_DATE, BK\_CALENDAR\_DATE, DATE\_KEY from DIMS.CALENDAR where trunc(BK\_CALENDAR\_DATE)>'1-Jan-2008'

***Lkp\_CurrConv\_ME –*** Fact table has three different types of amount columns.

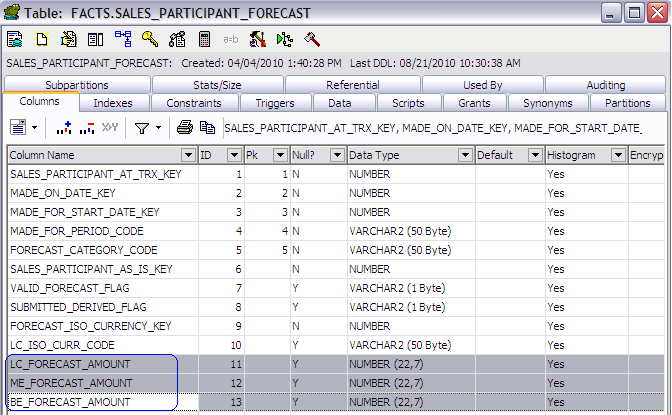
LC\_FORECAST\_AMOUNT – stores forecast in local currency amount.

* + If LC\_FORECAST\_AMOUNT is in USD, then both ME\_FORECAST\_AMOUNT and BE\_FORECAST\_AMOUNT are same as LC\_FORECAST\_AMOUNT.
  + If LC\_FORECAST\_AMOUNT is non-USD, then both ME\_FORECAST\_AMOUNT and BE\_FORECAST\_AMOUNT are converted to USD based on ME rate and BE rate respectively.

In this stage ME\_FORECAST\_AMOUNT is calculated using below logic -

1. Lookup DIMS.CURRENCY\_CONVERSION\_RATE using FROM\_CURRENCY = Func\_Currency (from source) and TO\_CURRENCY = 'USD' and BK\_START\_DATE = Made\_On\_Date and Rate\_Type = 'CORPORATE' to get the conversion rate.

2. Multiply LC\_FORECAST\_AMT with the conversion rate.



***Lkp\_CurrConv\_BE –*** In this stage BE\_FORECAST\_AMOUNT is calculated using below logic –

1. Lookup DIMS.CURRENCY\_CONVERSION\_RATE using FROM\_CURRENCY = Func\_Currency (from source) and TO\_CURRENCY = 'USD' and Made\_On\_Date between (BK\_START\_DATE and BK\_END\_DATE) and Rate\_Type = 'BUDGETED' to get the conversion rate.

2. Multiply LC\_FORECAST\_AMT with the conversion rate.

*P.N – All the records loaded in Work Table will have VALID\_FORECAST\_FLAG as ‘Y’ and DERIVED\_FLAG as ‘N’.*

1. ***jbSiebelWorkToDsSalesParticipatForecast –*** This job loads data from Work table into a dataset “Wrk\_Sales\_Participant\_Forecast\_Incr\_Replica.ds”.
2. ***jbSiebelSblFactToWrkSalesParticipantForecast –*** This job brings back processed records for a certain period in Work table from Fact table to maintain consistency in data for internal calculation (i.e. Rollup).

Some of the important stages are as follows:

***Facts\_Sales\_Participant\_Forecast –*** Below query is used to retrieve records from Fact table for a certain period -

select a.\* from (select \* from facts.sales\_participant\_forecast where made\_for\_start\_date\_key in

(select date\_key from dims.calendar where

**fiscal\_months\_back < 1** and fiscal\_month\_start\_date = bk\_calendar\_date) and made\_for\_period\_code = 'M'

and SUBMITTED\_DERIVED\_FLAG = 'S'

UNION

/\* WEEKLY FORECAST FROM FACTS - ALL WEEKS AFTER & INCLUDING PREVIOUS WEEK \*/

select \* from facts.sales\_participant\_forecast where made\_for\_start\_date\_key in

(select date\_key from dims.calendar where

**fiscal\_weeks\_back < 2** and fiscal\_week\_start\_date = bk\_calendar\_date) and made\_for\_period\_code = 'W'

and SUBMITTED\_DERIVED\_FLAG = 'S') a, dims.source\_system b

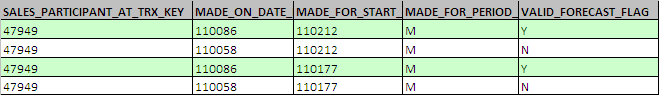
where a.source\_system\_key = b.source\_system\_key and upper(b.source\_system\_name)= 'SIEBEL'

***Lookup\_Wrk –*** In this lookup stage, data from input link is matched with the recently loaded dataset “Wrk\_Sales\_Participant\_Forecast\_Incr\_Replica.ds” and only rejected records are carried forward and loaded in Work table.

*P.N – All the records loaded in Work Table will DERIVED\_FLAG as ‘P’ to indicate they are already processed records.*

1. ***jbSiebelWrkToEdwSalesParticipantForecast\_Insert –*** This job loads data from Work table into the Fact table.
2. ***jbSiebelSalesParticipantForecastUPD\_N –*** This job updates VALID\_FORECAST\_FLAG with value ‘N’ for all records.
3. ***jbSiebelSalesParticipantForecastUPD\_Y –*** This job updates only VALID\_FORECAST\_FLAG column as per below logic -

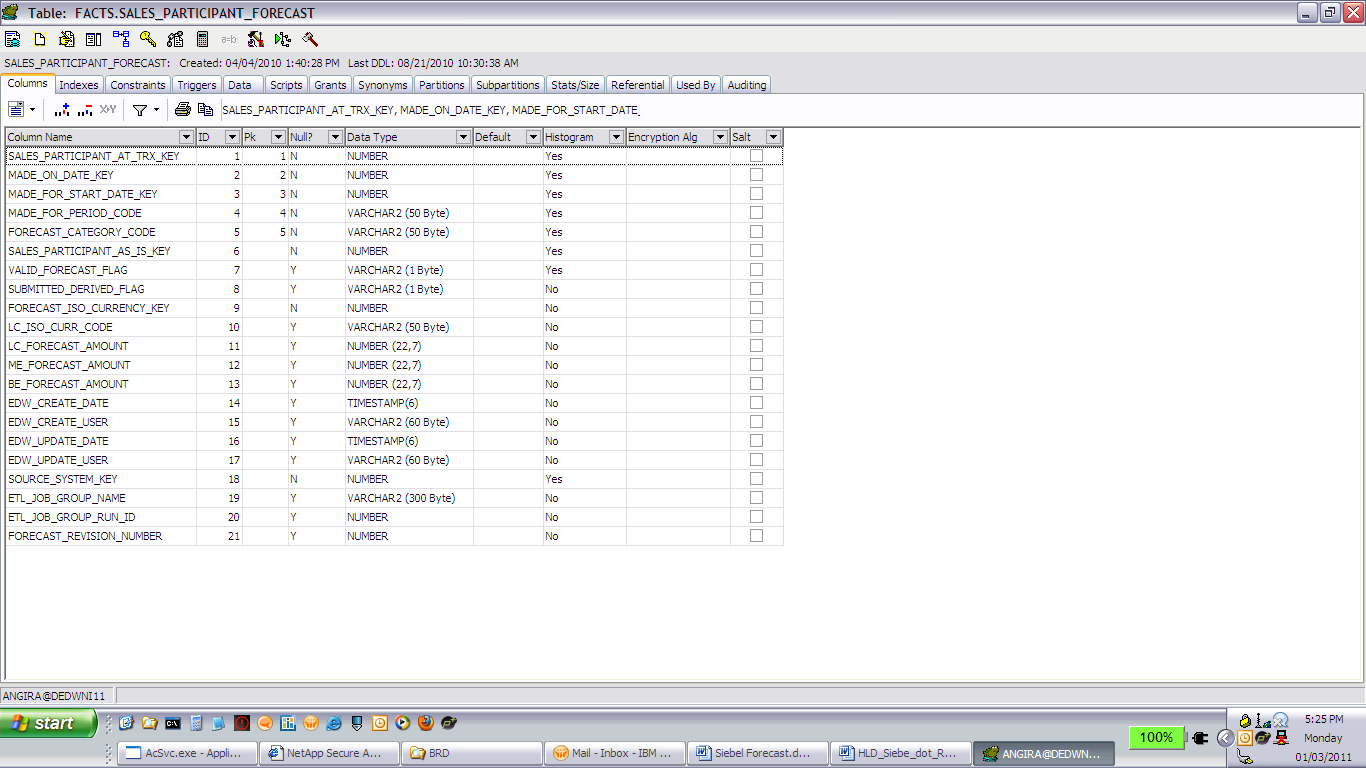
For a given period i.e. (MADE\_FOR\_START\_DATE\_KEY, MADE\_FOR\_PERIOD\_CODE combination) and a particular SALES\_PARTICIPANT\_AT\_TRX\_KEY, there can be only one record with VALID\_FORECAST\_FLAG as 'Y' which is having **maximum** MADE\_ON\_DATE\_KEY.



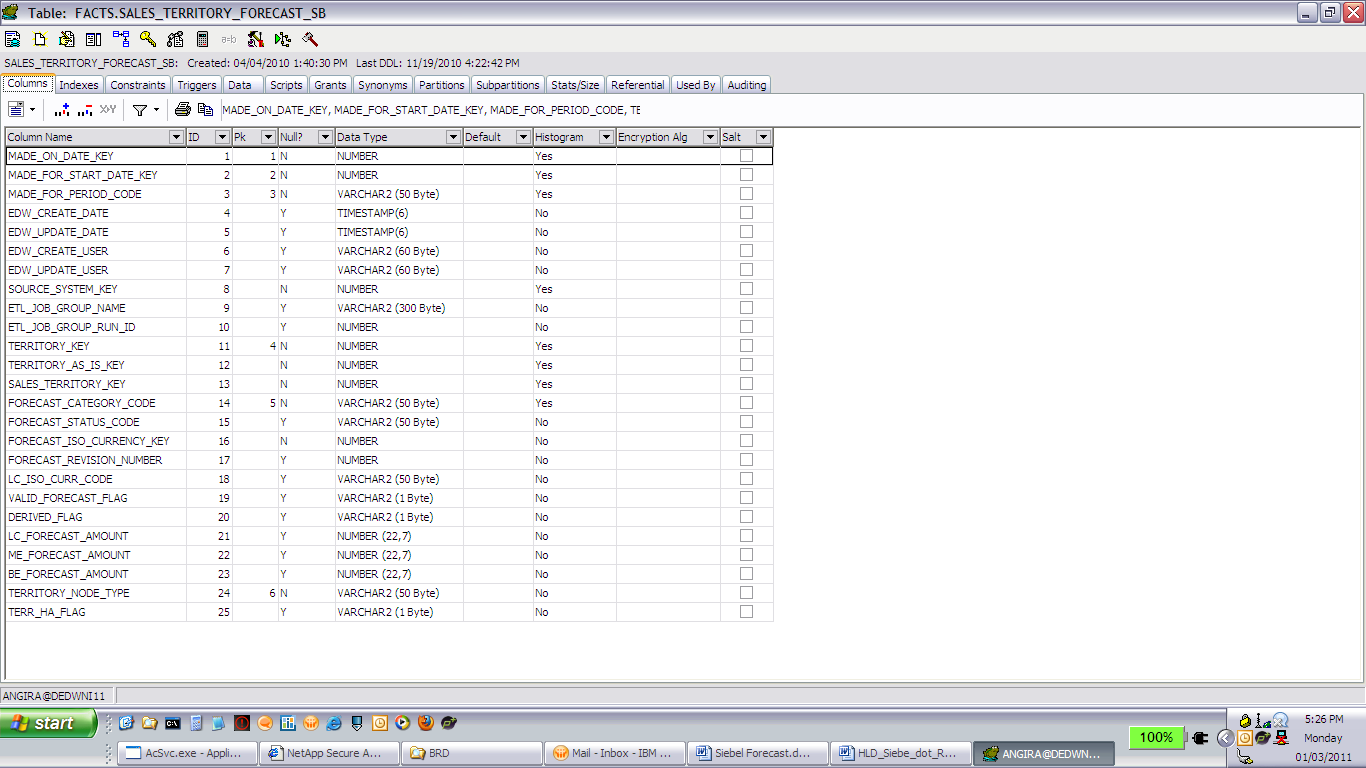
## Appendix

### *Table Structure*

FACTS.SALES\_PARTICIPANT\_FORECAST –



### FACTS.SALES\_TERRITORY\_FORECAST\_SB –



### *References*

High Level ETL Data Flow Document – Siebel CE Forecasting by Ramesh Raghothama



High Level Document - Siebel Dot Release by Raman Naren

