

# Planning



Forecasting, master production scheduling, material requirements planning and capacity requirements planning are seamlessly integrated features of PowerShift. Integration means better planning. No conflicting applications to get in the way — and planning runs can be scheduled at any time and even run in an unattended mode. Beginning with a sales forecast, the system considers current inventory and open orders to create a detailed plan for purchasing raw materials, manufacturing sub-assemblies and finished goods. Production scheduling considers the availability of materials and existing capacity constraints. If you take a large customer order and want to see its impact, just generate a new plan. Better inventory control, improved scheduling, and more productive relationships with suppliers are among the considerable bottom line benefits of the PowerShift planning system.

Item	FORC		FORECASTED FINISHED GOOD					
Product class		Plan period	DEFAULT	Stk UOM	EA	YTD	Last yr	
Item type	Finished good					Booked	0	0
Spread forecast	5	Lead time	6			Shipped	0	0
Start	End	Days/Per	Indpnd qty	Family qty	Indpnd sls	Dpnd sls	Fcst variance	
01/27/2011	01/27/2011	1	7	0	0	0	7	
01/28/2011	01/28/2011	1	7	0	0	0	7	
01/29/2011	01/29/2011	1	7	0	0	0	7	
01/30/2011	01/30/2011	1	7	0	0	0	7	
02/01/2011	02/07/2011	7	50	0	0	0	50	
02/08/2011	02/14/2011	7	50	0	0	0	50	
02/15/2011	02/21/2011	7	50	0	90	0	-40	
02/22/2011	02/28/2011	7	50	0	0	0	50	
03/01/2011	03/31/2011	31	220	0	0			
04/01/2011	04/30/2011	30	240	0	0			

Forecast in months and plan in weeks or days -- or mix the display with the first periods in days, followed by weeks and months

## Forecasting

If you don't think you forecast at your company, your customers are either very patient in getting the goods they order or you have extraordinary vendors and a manufacturing operation that can perform very rapidly. More likely, forecasting is actually occurring as requirements are anticipated and orders for material are placed. PowerShift forecasting tools offer many benefits:

- Formalize the forecasting process and evaluate material and capacity requirements based on a single, agreed to plan.
- Speed forecast entry with planning bills of material that look at groups of similar products.
- Allows entry of forecasts for larger periods and then spreads to smaller time units automatically.
- Enable entry of forecasts in summary or detail mode.
- Compare actual demand to forecasted demand by forecast period.
- Drop unconsumed forecast quantities based on options you configure.
- Support the import of forecasts from an external process.

Item no	FORC		FORECASTED FINISHED GOOD		Safety stock	0			
Item type	Finished good		RRL	Scrap %	Min order	50			
Prod class		Stock UOM	EA	Max days	Lot size	25			
Planner	\$\$\$	Auto plan	N	Lead time	OH + Flr stk	200			
Consignment	N	Planning period			In MRB	0			
Date	Sales	Forecast	Other req	Other sup	Planned	Proj on hand	ATP	Days	Per
01/27/2011	0	0	0	0	0	0	0	0	1
01/28/2011	0	78	0	200	0	122	110	5	2
02/03/2011 *	0	50	0	0	0	72	110	5	3
02/10/2011	0	0	0	0	0	72	110	5	4
02/17/2011	90	50	0	0	0	-68	110	5	5
02/24/2011	0					3	110	5	6
03/01/2011	0								
03/1	Demand type	Demand qty	Parent/Cust order	ECL	Order no	Due	LT	Frm	Src cd
03/1	Unconsumed forecast	50				02/08/2011	0.00	Y	
03/1	Customer order	90	CA-1 CA-100002621	1	CA-100002621	02/18/2011	0.00	0	
	Unconsumed forecast	50				02/22/2011	0.00	Y	

Peg demand to see details by period

## Finished Goods and Material Requirements Planning

- Finished goods planning plans independent demand items (typically products ordered by customers).
- The results of finished goods planning are used to create a detailed material requirements plan for the associated dependent demand items (parts whose demand comes from higher level manufactured items).

Inventory Status Inquiry		AR Invoice Inquiry		Customer Service Inquiry		Planning Action Selection		PowerShift / 00624		PowerShift / 00230	
CA-1	DVD / RANDY 4.0	SPI	MPC	Planning Action Selection				12/17/2012			
Sel	Item number	Action	Order no	Ln	Typ	Quantity	Dte from	Dt			
<input type="checkbox"/>	1BT	Release	Planned Ord	Pln		10000					
<input type="checkbox"/>	1C/KC	Release	Planned Ord	Pln		4					
<input type="checkbox"/>	1D/KC	Release	Planned Ord	Pln		1					
<input type="checkbox"/>	1DD/KC	Release	Planned Ord	Pln		1					
<input type="checkbox"/>	1G/KC	Release	Planned Ord	Pln		1					
<input type="checkbox"/>	1MAP	Move	Planned Ord	Pln		10000	12/16/2012	12/17/2012			
<input type="checkbox"/>	1MAP	Release	Planned Ord	Pln		10000					
<input type="checkbox"/>	1NT	Release	Planned Ord	Pln		2					
<input type="checkbox"/>	2X224	Move	Planned Ord	Pln		5000	12/16/2012	12/17/2012			
<input type="checkbox"/>	2X224	Release	Planned Ord	Pln		5000					
<input type="checkbox"/>	3X52	Move	Planned Ord	Pln		2500	12/16/2012	12/17/2012			
<input type="checkbox"/>	3X52	Release	Planned Ord	Pln		2500					
<input type="checkbox"/>	552F	Move	Planned Ord	Pln		2500	12/16/2012	12/17/2012			
<input type="checkbox"/>	552F	Release	Planned Ord	Pln		2500					
<input type="checkbox"/>	81580	Release	Planned Ord	Pln		24					
<input type="checkbox"/>	ABCOMP	Release	Planned Ord	Pln		12					
<input type="checkbox"/>	AFRAME	Release	Planned Ord	Pln		36					

Move, cancel, or release planned orders based on MFP & MRP exceptions

### System-wide Features

- Standardized user interface is easy to learn; accepts point-and-click or keyboard input.
- Lookups speed record or order retrieval; sort the way you want and use the Restart or Find functions to locate the record you need.
- Each user can set and save sort and selection options for reports and inquiries, reducing the need for custom reports and programming.
- Print to printers, e-mail, fax, PDF, EDI, or Microsoft Excel.
- Information is accessible with pop-up windows, drill downs, and jumps to related programs, reducing the need to switch screens.
- The Data Dictionary supports SQL, Report Generator, and QICLOOK™.
- F1 accesses online help for the program you are running.
- Security system allows users access to selected programs and accounts.

- Safety stock can be considered as an immediate demand or it can be included in the demand at the item's stated lead time. By item order policies include:
  - Minimum order quantity
  - Lot size
  - Maximum order quantity for manufacturing order release
  - Lead times
  - Maximum planning periods

### Capacity Requirements

The finalized material plan is the basis for generating a work center capacity plan:

- The capacity plan looks at both released and planned manufacturing orders to calculate an overall load that can be viewed out a year or more.
- A prioritized dispatch list summarizes work center requirements for all released manufacturing orders.
- A work center scheduling application fine tunes the sequence of events on the production floor.
- Inquiries or printed reports provide summarized and detailed pegging data that drills to the exact manufacturing orders that make up any load.
- Charts actual load compared to the work center's capacity (in both machine or employee hours).

### Benefits

- Planning programs can be scheduled to run at any time. Companies that want an up-to-date plan on a daily basis might schedule the material plan Monday through Friday at 5:00am so it is available for the first shift.
- Inquiries provide a snapshot of the current planning picture at any time as all transaction updates are handled in a real time manner.
- Reports and inquiries can be set up to display periods of your choice – either globally for all items or based on the item being displayed.
- PowerShift provides the options; you decide what makes sense for your business.

