



# Infor Distribution A+ Advanced Inventory Management User Guide

Version 11.00.01

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### **Publication Information**

Release: Infor Distribution A+ Advanced Inventory Management User Guide

Publication date: October 7, 2025

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## About this guide

This guide describes workflow, concepts and procedures for using the Infor Distribution A+ Advanced Inventory Management module.

## Related documentation

You can find related documentation at Infor Documentation Central ([docs.infor.com](https://docs.infor.com)). We recommend that you check this website periodically for updated documentation.

## Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and select **Infor Customer Portal** to create a case.

The latest documentation is available from [docs.infor.com](https://docs.infor.com) or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact [documentation@infor.com](mailto:documentation@infor.com).

# Chapter 1 Advanced Inventory Management Overview

One of the greatest challenges facing distributors today is responding to changing customer demand while maintaining a reasonable level of inventory investment. Since 80% of a distributor's inventory accounts for only 20% of sales, inventory managers either spend too much time managing slow moving items, or risk overstocking and backordering the under-managed portion of inventory.

An inventory management system should examine slow moving items, and free up time to manage the fast moving items that contribute most of the revenue to your business.

Most inventory management systems require dedicated and sophisticated buyers to supervise the system. In the past, this has limited the number of businesses able to use them. Distribution A+ has produced an advanced inventory management system that allows all levels of users to benefit from today's inventory management technology.

The Advanced Inventory Management (AIM) module provides simple tools for managing inventory assets. AIM forecasting techniques match inventory levels with changing customer demand. The inventory management functions provide straightforward reports and inquiries to identify areas of your inventory that may need adjusting.

The advanced inventory management and forecasting techniques of AIM are designed to help you:

- Reduce inventory investment by purchasing the right quantities of the right items at the right time.
- Reduce buying time by providing straightforward tools for suggesting, creating, and reviewing purchase orders.
- React to changing demand with increasing levels of customer service.
- Correct issues brought to your attention through the Exception Tracking process.
- Begin using the system right away with little set-up time. AIM inventory management reports help minimize inventory investment over time.

Topics in this Overview chapter include:

- Intended Audience
- AIM Interfaces
- File Maintenance
- Inquiries
- Reports
- Line Hits Measurement

- Replenishment Options
- Exceptions Tracking and Exception Center

## Advanced Inventory Management Interfaces

Advanced Inventory Management uses item information from the Inventory Accounting (I/A) module, and item demand history from the Sales Analysis (S/A) module to forecast customer demand and calculate the Order Point/Min and Line Point/Max of your items.

Vendor and ordering information from the Purchasing (PO) module is also used by AIM. Purchasing can use this information to suggest, create, and review purchase orders.

### Item Information (I/A)

You do not have to use AIM to perform its calculations for all of your items. It allows you to individually select the items for which forecast sales and ordering levels will be calculated. Any item that you select to use in AIM is called a planned item. An item in a warehouse (item balance information) is marked as being “planned” in Inventory Accounting through Item Balance Maintenance.

### Selecting Items To Plan

Since you may select individual items for use in AIM, new users (especially those who are not familiar with advanced inventory management systems) can simplify the implementation and learning process by implementing AIM in phases.

By starting with a small group of items that you are familiar with, you can evaluate the AIM forecasting results. As you become more familiar with AIM, you can add more planned items to be used in AIM.

### Planning Information

For each of your planned items, you define planning information. This information is used by AIM when performing its forecasting. It also indicates if certain planning information should be calculated, or manually entered, for an item.

Planning information consists of the AIM variables of lead time and order frequency. Also, the planning model used by the item is specified.

## Planning Models

A planning model determines the influence of each period of demand history (up to three previous years) used in AIM for displaying estimated demand for the next 12 to 13 periods. Additionally, a planning model may have a smoothing value to compensate for erratic demand. You define the planning models to use for your items.

## Purchasing Line (PLine) Item Classification

A PLine is a code that allows you to group like items together for purchasing purposes. It is similar in nature to an item class/sub-class which allows grouping like items for purchasing. For example, Vendor Troybilt (100) may have different groupings of items like "Equipment" for a PLine that would be Snow Blowers, Lawn Mowers, etc., and then have different groupings of "Parts" that would be Bags, Accessories, Replacement Parts, etc. These groupings could be broken out to allow discounts at these levels by the vendor.

A PLine is defined through Purchasing Line Maintenance (MENU POFIL2) and assigned at the Item Balance level through Item Balance Maintenance (MENU IAFILE). Purchasing Line Maintenance will then allow for "linking" items to vendors and optionally warehouses.

## Sales Analysis Information (S/A)

Sales Analysis information is used with AIM planning models to forecast future demand by product. The information provided by AIM help manage the AIM variables and planning models that drive AIM forecasting.

The sales demand for new items in your product line may be copied from any of your existing items. If a new item is replacing a previous item, you can use the demand history of the replaced item for the new item. If an item is added to your product line, you may pattern the sales of the new item after an existing item in your product line.

## Purchasing Information (PO)

Vendor and Vendor/Item information from the Purchasing module is used by AIM to determine the vendors from whom you should place an order. All planned items must have a valid primary vendor assigned to them. Vendors are defined in Purchasing (PO) through Vendor Master Maintenance (MENU POFILE).

A Purchasing Line (PLine) is a code defined in PO that allows you to group like items together for purchasing purposes. PLines will be updated and maintained at the Item Balance level through Item Balance Maintenance (MENU IAFILE), and defined through Purchasing Line Maintenance (MENU POFIL2) to allow for "linking" items to vendors and optionally warehouses.

Suggested Orders Report/Batch file generation allows for the selection of Purchasing Line and Line Hit Rank ranges. You can then filter by these parameters for suggested order run creations.

## File Maintenance

File maintenance in AIM is performed from the File Maintenance Menu. You are required to maintain the following files:

- **AIM System Options File:** This file contains the system-wide options, and options specific to each company that will use AIM. Maintenance of this file allows you to tailor AIM to your specific business needs. Use AIM Options Maintenance (MENU AIFILE) to maintain this file.
- **Models File:** This file contains the planning models that are used by AIM and IM&P to calculate forecast usage. You can create new planning models or copy existing models for modification. Use Planning Models Maintenance (MENU AIFILE or MENU IMFILE) to maintain this file.

File maintenance is also available for the following files:

- **AIM Balance File:** This file contains the AIM planning information for each item in one warehouse. The values in this file are from the AIM Variables File or AIM System Options File or may be manually maintained. Use Item Balance Maintenance (MENU IAFILE) to maintain this file.
- **AIM Monthly Forecast Quantities File:** This file contains the monthly forecasts for each of your items. Forecast values are calculated by AIM. You may, however, override the calculated values with your own values by maintaining this file. Use Monthly Forecast Quantities Maintenance (MENU AIFILE) to maintain this file.
- **Replacements File:** This file contains replacement and pattern definitions for your items. Replacement items use the demand history of a previously stocked item, and pattern items use the demand history of an existing stocked item. You may need to define replacement and pattern items so you can use AIM when a new item is added to your product line. Use Item Replacements/ Complements Maintenance (MENU AIFILE) to maintain this file.
- **AIM Lead Time Variables File:** This file contains the Lead Times for each month (expressed in the number of days) of the current calendar year for a group of items. Use AIM Lead Time Maintenance (MENU AIFILE) to maintain this file.
- **AIM Order Frequency Variables File:** This file contains the Order Frequencies for each month (the number of days between purchase orders) of the current calendar year for a group of items. Use AIM Order Frequency Maintenance (MENU AIFILE) to maintain this file.
- **AIM EOQ Parameters File:** This file contains the Economic Order Quantity (EOQ) parameters for a warehouse, warehouse/vendor, or warehouse/vendor/purchasing line. This information will be used when the system calculates an EOQ for an applicable item and will determine if the calculated EOQ will be used in the suggested order process. Use AIM EOQ Parameters Maintenance (MENU AIFILE) to maintain this file.
- **AIM Replenishment Files:** The Replenishment Ranking, Ranking Detail, Adjusters, Lead Time, Warehouse Transfer Rounding, and Usage files contain inventory and replenishment settings for your items. Inventory and replenishment settings are defined at the System, Warehouse, Vendor, Purchasing Line, and/or Item Class/Sub-class levels. Several setup screens are available that group the parameter settings into the following areas: Ranking, Adjusters, Lead Time, Warehouse Transfer Rounding, and Usage. The majority of the option settings impact calculations when setting ordering controls. Use Replenishment Options Maintenance (MENU AIFILE) to maintain this file.

- **AIM Usage Override Reason Codes:** Usage override reason codes are used during Replenishment Options Maintenance-Usage to define a reason when an adjustment is being written to the Item Sales Demand Manual Adjustments File (**ITADJ**) for Low Usage or Exceptional Usage. Use AIM Usage Override Reason Codes Maintenance (MENU AIFILE) to maintain these codes.
- **AIM Exception Reason Codes:** Exception reason codes are pre-defined by the system. You will only be able to maintain their description and set a priority. Assigning priorities to exceptions allows the buyer to sort exceptions by importance. Use AIM Exception Reason Codes Maintenance (MENU AIFILE) to maintain these codes.

**Note:** Variables can also be overridden through AIM Interactive Forecasting (AIMAIN) and/or Item Balance Maintenance (MENU IAFILE).

## Inquiries

AIM provides one primary option (Interactive Forecasting) to determine the effectiveness of your forecasting variables.

## Interactive Forecasting

Interactive forecasting shows the sales forecast of an item in a warehouse for the next year. The actual demand of the item for the previous year is also displayed. This helps you determine how the demand from each previous period is used in the forecast of future sales, based on the relative weights assigned to previous periods' demand history in the planning model. Manual adjustments to the demand data can be made to account for any known situations which might adversely affect the accuracy of a forecast.

Like the planning model analysis, you can select a different model for which sales will be forecast. The planning model search and the ability to manipulate the detail factors of a planning model, are also available.

This inquiry provides a quick and easy-to-understand tool to view the forecasting calculations performed by AIM. If you are not satisfied with a forecast, you will be able to understand what factors need to be changed to make the forecast more preferable.

Sales for the next month (month after the current month) are forecast entirely using the 12 months of demand history displayed. Sales for subsequent months are forecast using actual demand and sales forecast. Sales for the last month (one year from the current month) are forecast using only one month of actual demand (the current month), and 11 months of sales forecast.

## Reports

AIM provides reports designed to help buyers monitor inventory levels and manage the planning variables, etc. Over time, these reports will help optimize planning results and minimize inventory investment.

The AIM report menu is shared with Inventory Management and Planning (IM&P). Refer to the *Reports* topic in the Overview chapter of the Infor Distribution A+ Inventory Management and Planning User Guide for details about each report. Only the Line Hit Rank Analysis report will be explained in AIM, since it specific to the AIM module only.

## Line Hit Rank Analysis Report

Print this report at any time to view line hits for items. Line hits for items is the number of times a product appears on a sales order, warehouse transfer, or lost business transaction, regardless of quantity. By tracking a product's line hits, items can then be ranked based on these 'hits' (or the volume of transactions the item appears on) and categorized by the use of a rank code.

You will be able to limit the report to a warehouse or range of warehouses, determine if the Manufacturer Item Number will print, and automatically update the **Line Hit Rank** code in the Advanced Inventory Balance File (**AIBAL**), if needed.

Use Line Hit Rank Analysis (MENU AIREPT) to run this report.

## Line Hits Measurement

### Introduction of Line Hits

Line hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction, regardless of quantity. By tracking a product's line hits, you can rank a product by the volume of transactions it appears on.

Sales Analysis is enhanced to capture and categorize everyday sales, and transfers and lost sales, since line hits need to be in-sync with item demand (usage) for Advance AIM calculations to be accurate.

### Demand (Usage)

Usage is currently collected and adjusted in the Item Sales Analysis File (**ITMSA**), Item Sales Demand Adjustments File (**ITDMD**), and Item Sales Demand Manual Adjustments (**ITADJ**) files. It is

based on quantity and is stored in the number of periods set up in Sales Analysis Options. Only items with a shipped quantity are recorded. "Warehouse posted to", is the warehouse from where the item was shipped to the customer without regard of other warehouses, if needed. "Item posted to", is the item on the order, without regard if the item was an Upgrade or Alternate item from what was originally requested by the customer.

Since AIM currently uses the Item Sales Analysis File as its base for demand (usage), adjustments need to be made to have this base data be accurate for AIM calculations. Periods are set based on Sales Analysis Options. Demand is captured for these periods at Day-End, Order/Line Delete, Receive Manufactured Parts into Inventory, or Work Order Receipt Post.

Line hits are also included in this process and will be captured in the AIM System Line Hits File (**AILNHS**) and AIM Manual Line Hits File (AILNHM) files. No System Adjustments will be needed since this file is updated by requested ship date, but there may be a later need for manual adjustments where maintenance is provided.

Line hits will be recorded at:

- **Day-End** if original quantity is zero, which means that this is the first time this line item has passed through and will be for the original item and the original warehouse. Exception Hits (**Update Demand = N**) will be recorded in the Exception Line Hits or Exception Component Line Hits. Hits will be done for the Consignment Transfer 'AT' (Consignment Invoice "AI" order is bypassed). Component Line Hits are updated when Component update occurs for Kit Sales and for Manufactured sales, if system option for **Update Demand for MFG Items = S** (Sale) which includes multi-level updates.
- **Order/Line Delete** if original quantity is zero (line is new on the order) and **Update Demand = N** and will be for the original item and the original warehouse. Component hits are recorded as Lost Hits or Lost Component Hits and is updated for Kits and for Manufactured Components (regardless of system option for **Update Demand for MFG Items**). No multi-level updates will be recorded for Lost Components.
- **Receive Manufactured Parts into Inventory and Work Orders (Receipt Posting)** will update Component Line Hits, if system options for **Update Demand for MFG Items = R** (Receipt).

## Replenishment Options

### Introduction of Replenishment Options

Replenishment Options Maintenance (MENU AIFILE) allows you to set up and maintain replenishment options to be used to make inventory replenishment more efficient. Inventory and replenishment settings can be defined at the System, Warehouse, Vendor, Purchasing Line, and/or Item Class/Sub-class levels.

Replenishment options are available for:

- Ranking

- Adjusters
- Lead Time
- Warehouse Transfer Rounding
- Usage
- Exceptions

## Ranking

Ranking is a method of classification of products based on "hits". or the number of times this product appears on a sales order, warehouse transfer, or lost business transaction. (Hits may also be called issues, velocity, or frequency.) You can define the number of ranks (e.g., you can have 4 ranks of A, B, C, and D) that you track, as well as the scope for each rank; the scope can be the number of hits or percentage of hits that occur during a set period. You can also establish a 'number of months' limit for the system to consider an item as 'new', so when the ranking is done, these new items can be differentiated from those you have had on hand longer. A default code can also be assigned to be used for new items.

AIM System Options Maintenance (MENU AIFILE) provides a default rank to be initially assigned to item AIBAL (Advanced Inventory Balance) records. The Line Hit Rank Analysis Report (MENU AIREPT) can be run to utilize the defined rank parameters to review each item's hit history and classify each item into its appropriate rank. This report will show the rank, based on your setup for number of hits in the time period specified. The rank determinations printed on the report can also optionally be updated to the item's Advanced Inventory Balance File (AIBAL). This allows you to run the report and view the rank determinations multiple times, making adjustments desired to the rank definitions, and/or adjustments to the hits themselves, until all items are ranked as needed. Then, when the report presents the desired data, the report can be run to update the Advanced Inventory Balance File. You can adjust your rank definitions until you are satisfied, or you have the option to make manual adjustments to the 'hits' via the Interactive Forecasting screens.

Ranking definitions are maintained through Replenishment Options Maintenance (MENU AIFILE). The [Advanced Inventory Management Replenishment Options - Detail Ranking View/Selection Screen](#) is where you set the parameters used to automatically rank your products based on usage within a hierarchy. For example, you could select to have 7 ranks, A through G, and decide to use the percentage of line hits as your scope. You may decide that your **A** rank items might be those that make up just 5% of the hits for the total warehouse. In other words, the first 5% of your items (greatest amount of line hits in descending order) will make up the 'A' classification. You may then decide that your **B** items make up 20% of the line hits for the total of the warehouse, so the next 20% of your items (greatest amount of hits in descending order picking up where 'A' left off) would make up the 'B' classification. Your **C** items, which sell the most and where you make most of your money, make up 50% of the hits for the total of the warehouse, so the next 50% of your items (greatest amount of hits in descending order picking up where 'B' left off) would make up the 'C' classification. At this point, you would have accounted for 75% of the line hits in your rank definitions (A= 5, B=20, C=50). The rest of the detail ranks (of the 7 you decided to use) can only total to 25% because you cannot exceed 100%. Since you are allowed to have a zero percent defined for the last rank only, you can then define your final ranks of D, E, F, G as 5%, 15%, 5% and 0%, respectively.

The Line Hit Rank Code will be used in a variety of different calculations (Ranking, ASQ, 5-Hi, etc.) and can be set at the warehouse, vendor, purchasing line, item class/sub-class level. The Suggested Orders Report will also use the Line Hit Rank Code as part of the selection criteria to allow selection by product rank within other criteria.

Rank options also allow for adjusting ordering levels for products based on their rank. This is done by:

- Setting usage months to determine usage rate.
- Setting safety stock percentage or days based on the vendor or warehouse Authorized Replenishment Path (ARP) and dependent upon lead time.

By providing these parameters at the rank level, you can calculate a product's usage rate and safety stock quantities based on how fast they move through your inventory. Faster moving products accumulate more sales history over a shorter period of time; therefore, smaller usage windows (months) can be used to determine the usage rate. A shorter usage period more closely reflects the current sales demand of a product, as long as there is adequate sales activity to draw from. Typically, A-ranked products would use a 3 month period, B-ranked - 4 months, D-ranked - 5 months, and D and E may need up to 12 months with which to base usage.

The same is true for calculating safety stock. Lead times are generally more reliable with the higher-ranked products, and along with a greater volume of sales activity, you can use the safety percentage/ days parameters to properly adjust your safety stock for these products.

Buyers use Ranking to ensure that products that experience a higher volume of sales are ranked higher and that replenishment controls are in place to make sure there is always adequate stock levels for the higher ranked products.

## Adjusters

Order point adjusters provide you with the ability to modify the normally calculated order point of an AIM planned item to a higher value by using one of several secondary calculation methods. Then, by identifying specific parameters, you can limit/better manage which items will have their order points adjusted by the noted adjusters.

Using adjusters allows you to better manage products that experience exceptional usage, better manage customer buying habits on a product-by-product basis (since the order point is adjusted on products based on customer's actual buying habits) and improve customer service. With certain products, normal averaging of usage when determining replenishment amounts does not take into consideration instances such as when customers buy larger quantities on less frequent orders. In other words, if a product experiences minimal hits, but the quantities are higher than average usage for the product, you may experience a shortage of stock if you use standard replenishment recommendations. This can be a common occurrence if some of your customers order in standard packs, while others order smaller quantities.

In Item Balance Maintenance (MENU IAFILE), a flat threshold minimum adjuster value can be identified, with an expiration date, on the AIM Information Ordering Screen for a specific AIM planned item. In addition to that, the system provides three other adjusters that can be used to calculate the order points for more than just one item (so not specific to just one particular item's

AIBAL, like the threshold adjuster is) using several other, secondary calculations, which are: Average Sales Quantity (ASQ), Five-high Quantity (5HI), and Low Usage Adjuster (LUA).

When using one or more of these adjusters, the system will calculate an item's order point not only using the normal calculation but also by using those selected adjuster methods. Once all the calculations using all the selected methods are performed, the system then determines which calculation resulted in the highest order point and assigns that highest order point to the item; whichever adjuster was used would appear in the **Order Point Adjuster** field shown on the AIM Information Screen in Item Balance Maintenance (MENU IAFILE).

Adjusters are set on the Adjusters Screen in Advanced Inventory Management Replenishment Options, as well as at the product level in the Advanced Inventory Balance File.

You can view both the adjusted order and line points and the raw order and line points (the calculated order/line points) in the Advanced Item Balance File.

## ASQ

If the ASQ calculation is greater than the order point calculated, the order point is adjusted to the higher calculated value. If the minimum number of line hits defined on the Adjusters screen is not met, then this calculation will not be performed.

### Calculation:

The ASQ calculation is: Usage / by Line Hits.

## 5-Hi

The Five-high calculation reviews the highest sales for the number of usage months defined in Advanced Inventory Management Replenishment Options-Detail Ranking. If the minimum numbers of hits, as defined in the **5-Hi Minimum Hits** field are met, the five highest sales quantities and related order information are stored and used to calculate an average. The highest sales quantity is thrown out, and then the remaining sales are added together and divided to determine an average of the highest sales values. If this average is greater than the calculated order point, the order point is adjusted to equal this value. The adjustment must not exceed the maximum dollar difference for the Five-high adjustment.

This adjustment to the standard order point compensates for products where sales hits are low, but customers tend to buy package quantities, such as a 'case'.

### Calculation:

The 5-Hi calculation is: The highest sales for all months included in the usage calculation are reviewed to determine the five highest sales quantities. The highest quantity is removed, and then the remaining sales are added together and divided by the number of high sales used.

## LUA

The Low Usage Order Point Adjuster is a comparison of actual hit data compared to what has been set up in the maintenance.

The Low Usage Order Point Adjuster allows the changing or adjusting of the normal calculated order point in AIM to a 1 if it had been calculated to be zero (due to the low usage of the item). A specific number of months must be identified for the system to know from which months to collect the item's hit history to be used for the calculation (note that the LUA will be looking at the item's hits over this number of months, which can be different, if desired, than the number of months used for the straight usage in the normal order point calculation which resulted in the zero order point). Then, once this number of months for hit data has been identified, you will set up specific parameters (i.e., limits) that must be met in order for this adjuster to be applied.

## Lead Time

Lead time is the number of days a vendor requires to deliver an item after it is ordered. This data is used in the Order Point/Min and Line Point/Max quantities calculated by Advanced Inventory Management (AIM).

The Lead Time screen is where you would define parameters that are used for overriding lead time using a min/max setting based upon the vendor/warehouse Authorized Replenishment Path (ARP). You can also set options that apply a lead time average. The parameters that you define would be used in the calculation of the lead time.

## Warehouse Transfer Rounding

Warehouse Transfer Rounding parameters, available on the [Advanced Inventory Management Replenishment Options - Warehouse Transfer Rounding Screen](#), assist with determining the suggested order quantity for warehouse transfers generated via the Suggested Order Process.

Warehouse Transfer Rounding parameters provide the system with information that helps evaluate the needed and normally calculated suggested order quantity against the effectiveness of possibly rounding up that quantity to a more cost-effective buy unit/quantity. Parameters ensure that the rounding up process does not exceed maximum cost values (which can be set differently for new and existing items), and/or a maximum number of months' supply for existing products only.

Warehouse Transfer Rounding parameters allow you to:

- first define which units of measure (UOM) for a product will be reviewed when determining if a warehouse transfer quantity of that item should be rounded; possible UOMs are the:
  - buy UOM from the warehouse transfer's vendor's Vendor/Item File record if one exists; otherwise, it is the item's primary UOM (both of which are referred to as the "Transfer Unit").
  - buy UOM from the warehouse transfer's purchasing vendor's Vendor/Item File record if one exists (referred to as the "Buying Unit").

**Note:** If no rounding is to occur, the calculated quantity for the suggested order will be in the item's default UOM.

- identify the number of months' supply to use when comparing the rounded transfer quantity for existing products to ensure the rounded-up quantity does not exceed the total usage quantity for this number of months.
- select the maximum cost allowance for any extra quantity used in the rounding up of a new product's quantity to a transfer or buy unit.
- select the maximum cost allowance for any extra quantity used in the rounding up of an existing product's quantity to a transfer or buy unit.

Through Replenishment Options Maintenance (MENU AIFILE), you define whether one or both units will be considered. Hierarchy type rules are in place and parameters can be established to ensure that if both UOMs are selected for use, the most cost-effective method will be used.

There are ten combinations that can occur based on these settings. By having these options set in various combinations, you are provided with the most flexibility in having the system select the best suggested order buy unit of measure/quantity. The following table summarizes the results of the ten combinations that are possible with the use of the rounding settings:

<b>If the Transfer Unit Rounding is:</b>	<b>And the Buying Unit Rounding is:</b>	<b>Then:</b>
Transfer Unit ( <b>T</b> )	Never Round ( <b>N</b> )	Send the warehouse transfer package (transfer unit).
Transfer Unit ( <b>T</b> )	Smart Unit ( <b>S</b> )	If vendor package (buying unit) is within parameters, send the larger of the two; otherwise, send the warehouse transfer package.
Transfer Unit ( <b>T</b> )	Buying Unit ( <b>B</b> )	Send the larger of the two package units.
Smart Unit ( <b>S</b> )	Never Round ( <b>N</b> )	Send the warehouse transfer package if within parameters; otherwise, send the raw order quantity.
Smart Unit ( <b>S</b> )	Smart Unit ( <b>S</b> )	If both meet parameters, send the larger of the two; otherwise, send the one that meets parameters. If neither meet parameters, send the raw order quantity.
Smart Unit ( <b>S</b> )	Buying Unit ( <b>B</b> )	If the warehouse transfer package is within parameters, send the larger of the two packages; otherwise, send the vendor package.

If the Transfer Unit Rounding is:	And the Buying Unit Rounding is:	Then:
Never Round ( <b>N</b> )	Never Round ( <b>N</b> )	Send the raw order quantity.
Never Round ( <b>N</b> )	Smart Unit ( <b>S</b> )	Send the vendor package if it is within the parameters; otherwise, send the raw order quantity.
Never Round ( <b>N</b> )	Buying Unit ( <b>B</b> )	Always send the vendor package.
If the Transfer Unit Rounding is:	And the Buying Unit Rounding is:	Then:
Ignore ( <b>I</b> )	Ignore ( <b>I</b> )	<p>Do not perform rounding for this Advance Inventory Management Replenishment Option record. Go to the next level in the Advance Inventory Management Replenishment Options hierarchy to check rounding parameters.</p> <p>Note that both the <b>Transfer Unit Rounding</b> field and <b>Buying Unit Rounding</b> field must be set to <b>I</b> (Ignore).</p>

In addition to the parameters in the above table, different cost maximums can be set for ‘new’ and ‘existing’ items. An item is considered new based on its assigned rank and the applicable ranking options (refer to the **New if created in last \_ month’s** field on the [Advanced Inventory Management Replenishment Options - Ranking Screen](#)). The system will find the item’s cost and multiply that cost by the extra quantity needed to round up to the purchasing buy unit of measure. If the value of that extra quantity, then exceeds the maximum value here, then the rounding will not occur. Note that the cost will be derived as follows:

- For regular purchasing vendors, from the vendor/item **Cost** in Vendor/Item Information Maintenance (MENU POFILE), converted to the appropriate UOM; or if no vendor/item record exists, then from the standard/average/user cost based on the Order Entry Options setting for the company owning the warehouse.
- For transfer vendors, from the warehouse level **Base Price Code** field in Purchasing Options Maintenance (MENU XAFILE).

Once the system has used the provided parameters and determines to round up to the purchasing buy unit of measure, then it will perform one final check for your existing items (not applicable to ‘new’ items) to validate that the rounded-up quantity does not exceed the ‘number of months usage’ identified. This ensures that you do not transfer more than a warehouse can use in a reasonable amount of time. Therefore, if you identified a maximum of two month’s usage, the system would

review that rounded up quantity against the quantity total for the previous two month's usage, and if the rounded up quantity exceeds that previous two months usage quantity, then it will not perform the rounding. These usage quantities can be found in the Interactive Forecasting option (MENU AIMAIN). Also, if, for example, you were generating suggested orders for warehouse 6 and your 'number of month's usage' was 2 months, you could access Interactive Forecasting for this item in warehouse 6, and if the current period is March, you would add up the usage for January and February and that total quantity would be compared with the rounded up quantity to ensure that the rounded up quantity would not exceed it. If the total usage in the receiving warehouse for those two periods is less than the rounded-up transfer quantity, then the rounded up quantity would not be used.

For additional detailed information regarding Transfer and Buying Unit Rounding, refer to the **Unit Method** field in [CHAPTER 28: Maintaining Replenishment Options, Advanced Inventory Management Replenishment Options - Warehouse Transfer Rounding Screen](#).

## Usage

Usage options determine the way an item's usage history will be used for determining future usage. These options are used for determining the average monthly usage (AMU) calculations, based on the Usage Method type. There are two Usage Method types for determining an item's usage when calculating its AMU:

- 1 The Backwards Usage Method goes backward the number of **Usage Months** from before the Current Forecast Period, accumulating the usage as it goes backwards.

**Example:** If the current month is April, and the number of months usage is 3, the system will go backwards from the current, to the prior three months, and accumulate all usage quantities for January, February, and March.

- 2 The Trending Usage Method will go back one year (12 months or 13 periods depending on the set up of the company's fiscal year) and then accumulate from that month/period forward for the number of **Usage Months**.

**Example:** If current month is April, the system will go back to April of the previous year (current-1) and then look forward, including that 1-year ago period of April for the indicated period of months; so it would go back to April of the previous year and include usage from April, May, and June the previous year.

This type of Usage Method can also have a calculated Trend Percent applied to it. The starting period (when going back the one year) can be adjusted to start earlier or later (by identifying a seasonal line up number of months) depending on how the season appears to be going, and the starting period can be advanced by the lead time.

**Example:** If current month is April, and the number of months usage is 3, then when trending, the system would normally go back to one year ago April (current-1); and including that 1- year ago period of April, it would look forward for a total of 3 months, so it would get usage from April, May, and June of the previous year. But, if a seasonal line up of a positive 2 months exists, then instead of going back to April of last year (current-1), push that up by 2 months and go back to June of last year and then accumulate usage from June, July, and August (still only for the 3 months usage). Similarly, if there was a seasonal line up of a negative 2 months, then instead of going back to April

of last year, push that back by 2 months and go back to February of last year and then accumulate usage from February, March, and April of the last year.

The seasonal line up value pushes the period being looked at for the AMU usage months; it does not affect which months are looked at for the trending percent calculation. So, even if there was a 2 seasonal line up months that ensures usage is accumulated from February, March, and April of last year, when calculating the trend percent, the system will still look at the indicated months prior to both the current month and the one-year ago month. In other words, using our example above, it will still review January, February, and March of last year, and January, February, and March of this year for the trend percent calculations.

**Note:** An ending period (expiration date) for when this seasonal line up value defined at this level should stop being used must be provided; its purpose is to inform the system when to no longer look at this level anymore for this seasonal line up months value.

When the starting period is advanced by lead time, then the Advanced Inventory Balance File (**AIBAL**) lead time (if one), or vendor/item lead time (if one), or vendor's lead time (converted to days) can be used to 'advance' the periods used to accumulate usage.

**Example:** If current month is April, and the number of months usage is 3, the system would normally go back one year to April of last year (current-1) and accumulate usage for April, May, and June of last year. But, if there is a lead time of 90 days (3 months) for example, then the system will move ahead the beginning month to look at the period from April to July, and then accumulate usage from July, August, and September of last year.

The advance by lead time process pushes up the period being looked at for the AMU usage months; it does not affect which months are looked at for the trending percent. Therefore, even if a 90 day lead time exists that ensures usage is accumulated from July, August, and September of last year for the AMU, when calculating the trend percent, it will still look at the indicated months prior to both the current month and the one-year ago month. In other words, using the above example, it will still review January, February, and March of last year and January, February, and March of this year for the trend percent calculation values.

The default Usage Method type and seasonal item parameters are set up through the [Advanced Inventory Management Replenishment Options - Usage Screen](#). An item is considered a seasonal item if:

- the **Usage Method** is defined as the Trending Usage Method in AIM System Options Maintenance (MENU AIFILE), AIM Replenishment Options (MENU AIFILE), or Item Balance Options Maintenance (MENU IAFILE), and
- the item has enough usage history, which is the number of Usage Months for the item plus the number of periods (12 or 13) in the year for the company that controls the warehouse.

If either of the above criteria is not met, the item will be treated as a non-seasonal item and the Backwards Usage Method will be utilized instead.

**Note:** Seasonal items that are using the Trending Usage Method are required to have more than one year of history before an accurate calculation can occur. Meaning, an item with a **Usage Months** of 3 needs 15 months of history ( $3 + 12 = 15$ ), and an item with a **Usage Months** of 4 needs 16 months of history ( $4 + 12 = 16$ ). This is because the Trending calculation looks at the Usage period that comes before the one year look back and the Usage period that comes before the current month. So, due to this, a seasonal item set to use the Trending Usage Method, that does not

have enough usage history, will default to a Backward Usage Method in calculations until it has enough history.

## Exceptions Tracking and Exception Center

### Exceptions Tracking

Exceptions tracking can be used during the AIM Monthly Update (MENU AIMAST) and in other areas in Infor Distribution A+ when an item's AIM information is changed. The purpose of exceptions is to notify the buyer when a product's ordering controls have been automatically adjusted, or when products have met or exceeded certain thresholds. Normally, these exceptions just serve as a notification to the buyer to be aware of changes to the product, or to take a closer look at the product's ordering controls. All exceptions will be shown in Infor Distribution A+.

The exceptions that can be generated in Distribution A+ include:

- IVT – Inventory Value Change (Threshold)
- IVA – Inventory Value Change (ASQ)
- IVF – Inventory Value Change (5-Hi)
- IVL – Inventory Value Change (LUA)
- ASQ – Average Sales Qty – Max Amount
- 5HI – Five-High Sales Qty – Max Amount
- TRE – Threshold Ready to Expire
- TLA – Threshold With Low Activity
- OPR – Overridden Product about to Reset
- PWS – Stocked Product Zero OP/LP With Hits
- PWN – Non-Stock Product With Hits
- PWD – Discontinued Product With Hits
- PSR – Purchase Order Safety Review
- PLT – Purchase Order Lead Time Review
- EUS – Exceptional Usage Corrected
- LUS – Low usage Corrected
- SLP – Seasonal Trending – Percent Lower than Minimum
- SHP – Seasonal Trending – Percent Greater than Maximum
- SLH – Seasonal Trending – Hits Lower than Last Year
- STH – Seasonal Trending – Hits Lower than This Year
- FCA – Forecast Accuracy
- EDR – Expiration Date Review

Refer to Replenishment Options Maintenance (MENU AIFILE) for further details about exceptions.

## Exception Center

The Exception Center (MENU AIMAIN) provides the buyer with a way to manage exceptions that were generated in Distribution A+ for an item and warehouse when an item's AIM values are changed, and at AIM Month End when you perform the AIM Monthly Update (MENU AIMAST). In addition to viewing exceptions, you will have the ability to delete exceptions that you no longer want to see in the Exception Center.

For each exception that is generated, a screen will be available in the Exception Center. Each screen will have its own appearance and data related to the exception, and each will display a message describing the exception. All information on the screens will be display-only.

Refer to the Exception Center (MENU AIMAIN) for complete details of viewing and managing exceptions in Distribution A+.

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## Chapter 2 AIM Variables

There are two variables used in Advanced Inventory Management (AIM):

- 1 Lead Time
- 2 Order Frequency

All variables, combined with demand history, are used to determine the minimum and maximum balance quantities of your forecast items. This chapter explains each variable, how they are assigned to your items, and how they are used.

**Note:** Purchasing Line functionality is included in the AIM variable options to allow for the definition of Lead Time and Order Frequency parameters at this level. These variables are the same variables used with IM&P calculations, except for using days instead of weeks. They will be used for any calculation of ordering quantity with the advanced inventory calculations. For additional information regarding Purchasing Line, refer to the Infor Distribution A+ Purchasing User Guide.

### AIM Variable Definitions

This section explains how the Lead Time and Order Frequency variables are assigned to your forecast items.

#### Lead Time

The lead time of an item is the number of days a vendor requires to deliver an item after it is ordered. Item lead times are used in the Order Point/Min and Line Point/Max quantities calculated by Advanced Inventory Management (AIM). You may define the lead time to be from 1 through 364 days.

Assuming that other variables and demand history are constant, the Line Point/Max balance calculation for an item with a long lead time will be higher than the Order Point/Min balance quantity of an item with a shorter lead time.

To monitor lead times, Purchasing provides vendor performance information. Use the Vendor Performance Inquiry (MENU POMAIN) and Vendor Performance Report (MENU POREPT) to determine if lead times should be adjusted. If a vendor's lead time needs to be adjusted, change the

Advanced Inventory Variables File to reflect that change for the months that vary. Distribution A+ will automatically increase the Order Point/Min balance for that vendor's items.

## Variations in Lead Time

If a vendor's lead time changes during the year, you can change the lead time to reflect the change for the affected months. AIM will automatically adjust the Order Point/Min balance for that vendor's items for the affected time period.

**Example:** If you know that a vendor has a planned shutdown in the month of July, you can change the lead time for that vendor for the month of July, and return it to normal in August. AIM will automatically increase the Order Point/Min balance for that vendor's items for the month of July.

## Order Frequency

Order frequency is the number of days between placing purchase orders for an item. You may define the order frequency to be from 1 through 364 days.

**Example:** If you order from a vendor every 60 days, the order frequency with that vendor is low compared to the vendor that you order from every 14 days, with whom you have a comparatively high order frequency.

Assuming that other variables and demand history are constant, the Order Point/Min balance calculation for an item from a vendor with a low order frequency (e.g., 60 days) will be higher than the Order Point/Min balance quantity of an item ordered from a vendor with a high order frequency (e.g., 14 days).

## Assigning Order Frequency

The order frequency should allow enough time between orders to allow each purchase order to exceed the vendor weight and monetary amount minimums. These minimums are defined in Vendor Master Maintenance (MENU POFIL).

If some of your items are regularly stocked below their Order Point/Min balance quantities before you plan to order them again, you may consider increasing your order frequency with the items' vendors. Doing this will reduce minimum stocking levels for that vendor's items, keeping item quantities above their minimum stocking levels.

## Variations in Order Frequency

If your ordering frequency with a vendor changes during the year, you can change the ordering frequency to reflect the change for the affected months. AIM will automatically adjust the Order Point/Min balance for that vendor's items for the affected time period.

**Example:** If a buyer takes a 21 days vacation in May, and has several vendors with order frequencies of 14 days, you can change the order frequency for the month of May. AIM will automatically increase the Order Point/Min balance for the items purchased from that buyer's vendors.

## Maintaining Variables

Variables and other forecasting information for individual items are stored in the Advanced Inventory Balance File (**AIBAL**). AIM allows you to assign AIM variables to individual items in this file automatically. If automatic variable assignment is not feasible for some items, you may manually override the variables for individual items.

## Automatically Maintained Variables

At the beginning of each month, during the AIM Monthly Update (MENU AIMAST), AIM automatically updates the variables in the AIM Balance File for every item. The value of each variable is retrieved from the AIM Variable Files for the most specific group that applies to the item. If no value is found, AIM uses the default value established through AIM System Options Maintenance (MENU AIFILE).

## AIM Balance File

The AIM Balance File contains the AIM variables, and other information for an item in a warehouse, including the indication if the item is planned or not. A planned item is one that you have selected for forecasting calculations in AIM.

**Note:** You will not be able to maintain the AIM Balance information for an item if you do not specify through Item Balance Maintenance (MENU IAFILE) that the item is planned (by keying **Y** in the Plan field) and the **Planning Tool** of choice is **A** (for Advanced Inventory Management).

Both the Item Balance File and the AIM Balance File are maintained through Item Balance Maintenance.

## AIM Variable Information

To automatically assign variables in AIM, you must define them (for groups of items) in the AIM Variables File. If a variable for an item is not defined, the default value [defined through AIM System Options Maintenance (MENU AIFILE)] is used. Therefore, you should specify AIM variables for those groups of items that are different than the default variables.

The AIM Variables File contains the variables for groups of items. This provides a convenient method for maintaining the variables for your items. It minimizes the maintenance of each item in the AIM Balance File.

## Menu Options

Each variable in the AIM Variables File has its own maintenance option:

- Lead Time Maintenance (MENU AIFILE)
- Order Frequency Maintenance (MENU AIFILE)

## Item Groups for Variable Definitions

The groups of items for which each of these variables is defined may be very general or very specific. The groups, least to most specific, are:

- Warehouse Only
- Warehouse and Item Class
- Warehouse and Item Class/Sub-Class
- Warehouse and Vendor
- Warehouse, Vendor, and Item Class
- Warehouse, Vendor, and Item Class/Sub-Class
- Warehouse, Vendor, and Purchasing Line
- Warehouse, Vendor, Purchase Line, and Item Class
- Warehouse, Vendor, Purchase Line, and Item Class/Sub-Class

The most specific variable definition possible for an item is manually created by uniquely overriding the variables for that item in the AIM Balance File.

## AIM System Options

AIM System Options Maintenance (MENU AIFILE) contains the default values of all AIM variables. The default variables are used when updating variables in the AIM Balance File for an automatically maintained item, if the item has not had a variable defined for it in the AIM Variables File.

**Note:** AIM System Options are also used to create new planning records in the AIM Balance File. This is accomplished through Create AIM Balance Records (MENU AIMAST) when installing AIM after you have already been using Distribution A+ without the AIM module.

## Automatic Maintenance Summary

The following table shows all the variables that can be maintained automatically and the source of the variable's value:

VARIABLE	SOURCE OF VALUE
Lead Time	AIM Variables File - AIVAL and AIM Lead Time calculations
Order Frequency	AIM Variables File - AIVAF
Safety Stock	Min/Max Calculation and AIM Safety Stock calculations

## Manually Maintained Variables

AIM allows you to override the values that it automatically maintains for the AIM variables. This manual variable maintenance requires more supervision to achieve the best possible AIM results, so it should be used only when automatic maintenance is not feasible or if variables do not match the value for other items in its variable group (as defined in the AIM Variables File).

Use Item Balance Maintenance (MENU IAFILE) to override AIM variables for your planned items. You may specify if an override is permanent or temporary.

### Permanent Overrides

Permanently overridden variables will not be changed by AIM. Use Item Balance Maintenance (MENU IAFILE) to permanently change a variable value. Change the variable's maintenance code to O (override). AIM will then allow you to change the variable's value. Remember, this value will remain in effect until you either change it again, change the maintenance code to a temporary override (1 through 9), or return the code to reflect automatic maintenance (A).

### Temporary Overrides

You can temporarily override a variable's value by changing the maintenance code to 1 through 9. This value is the number of months the override will be in effect. When AIM Monthly Update (MENU AIMAST) is performed, this value is reduced by one until the override expires. After the specified number of months passes, the maintenance code reverts to A, and the variable will once again be automatically maintained.

## Chapter 3 AIM Calculations

This chapter examines the calculations performed in Advanced Inventory Management (AIM). You do not need to understand all of these calculation techniques to use AIM.

Various types of calculations that can occur are provided for your reference.

This chapter is structured so that each subsequent calculation builds on a previous calculation or uses a previously defined term. When looking at a particular calculation, you may need to reference other areas in the chapter that were explained before the calculation to understand applicable terms that are used.

### Standard Usage Months

The number of sales periods that are used to accumulate Usage. Usage months can be defined in:

- Item Balance Maintenance (MENU IAFILE) on the Advanced Inventory Management Information Ordering Screen.
- Interactive Forecasting (MENU AIMAIN / MENU IMMAIN) on the Advanced Inventory Management Information Ordering Screen.
- Replenishment Options Maintenance (MENU AIFILE) on the Advanced Inventory Management Replenishment Options - Detail Ranking Screen.
- AIM System Options Maintenance (MENU AIFILE) on the Advanced Inventory Management System Options-Continued Screen.

### Rounding

The rounding that occurs on calculated values. For example, the rounding value for Order Point is defined through AIM System Options Maintenance (MENU AIFILE) in the **OP/OQ/LP/EOQ Rounding** field. Valid entry values are:

- **N** or leave blank for normal rounding. The first decimal position is reviewed to see if it is greater than or equal to 5, and if so, the whole number is rounded up by 1.
- **U** for round up to the next value. If the complete decimal value is greater than zero, round up the whole number by 1.

- **D** for round down to the previous value. No rounding of the whole number is performed.

## Average Monthly Usage (AMU)

The average monthly usage for an item/warehouse.

## Usage Non-Seasonal Item

Accumulate total usage (sales) for previous months for the Standard Usage Months span.

## Usage Seasonal Item

### Usage

- Accumulate Usage by going back one year in history (which will become the starting period) and then accumulating forward for the number of Standard Usage Months. The starting period can be affected by Seasonal Line Up and/or Advance by Lead Time. This accumulated Usage can then be impacted by Trending.

### Trending

- This Year Usage is accumulated by working backwards from the current period for the duration of the Usage Months.
- Last Year Usage is accumulated by going backwards 1 year plus the Usage Months and then going forward for the duration of the Usage Months.
- This Year Usage is then divided by Last Year Usage and then multiplied by 100.
- This Year Usage and Last Year Usage starting points for accumulation are not impacted by Seasonal Line Up and/or Advance by Lead Time.

### Seasonal Line Up

- Season starting point (starting period for usage accumulation) can be adjusted to be earlier or later using the Seasonal Line-Up.

## Advance by Lead Time

- The lead time of the item will be used to push out the starting period for usage accumulation.
- This is done in months:
- 0 – 29 day lead time (no advance)
- 30 – 59 day lead time (1 month advance)
- 60 – 89 day lead time (2 month advance)
- 90-119 days, then advance 3 months
- 120-149 days, then advance 4 months
- 150-179 days, then advance 5 months,
- 180-209 days, then advance 6 months, etc.

## Average Monthly Usage Calculation

**Average Monthly Usage = Usage / Standard Usage Months**

## Input Exceptions

### Standard Usage Months

If Standard Usage Months is greater than the number of months that the item has been in inventory (the **Date First in Inventory** field from **ITBAL** compared to the current date), then the item's age months will be used as the Standard Usage Months.

## Average Monthly Days (AMD)

The average number of days in a month, defined in AIM System Options Maintenance (MENU AIFILE).

## Average Daily Usage (ADU)

The average daily usage of an item.

---

## Calculation

**Average Daily Usage (ADU) = Average Monthly Usage (AMU) / Average Monthly Days (AMD)**

## Replacement Cost

The cost to replace (purchase) an item will be determined in the following order:

- Cost will default to the Item Balance Standard, User, or Average Cost, depending on the defined **Cost to be Used for GL** option.
- If cost is zero and Item Balance average cost has a value, it will default to the Item Balance Average Cost.
- When the primary vendor for the item is not a warehouse transfer vendor and there is a vendor/item record, the vendor/item cost will be used.
- When the primary vendor for the item is a warehouse transfer vendor, the **Base Price Code** from Purchasing Options Maintenance (MENU XAFILE) on the Purchasing Warehouse Options Screen will be used.

## Economic Order Quantity (EOQ)

The order quantity that minimizes total inventory holding costs and ordering costs.

EOQ parameters can be set in:

- AIM Company Options Maintenance (MENU AIFILE) on the Advanced Inventory Management Company Options Screen.
- AIM EOQ Parameters Maintenance (MENU AIFILE) on the AIM EOQ Parameter Maintenance Definition Screen.
- Item Balance Maintenance (MENU IAFILE) on the Advanced Inventory Management Information EOQ Screen.
- Interactive Forecasting (MENU AIMAIN / MENU IMMAIN) on the Advanced Inventory Management Information EOQ Screen.

EOQ will be rounded(see [Rounding](#)).

## Cost to Purchase

The cost incurred to purchase an item. This is a flat value representing the average cost, per unit, of processing an item on a purchase order (i.e., the inclusive cost associated with creating, reviewing, approving, printing, mailing, tracking and receiving the item on a purchase order).

## Carrying Cost Percent

The cost incurred to store/house an item in stock. This is a flat percent representing the average cost percentage, per unit, of holding an item in inventory (i.e., the inclusive cost associated with things such as warehouse space, insurance, special packaging/handling, refrigeration, etc.).

## EOQ Calculation

The EOQ calculation is as follows:

**Economic Order Quantity (EOQ) = Square Root [24 x Average Monthly Usage (AMU) x Cost to Purchase (PO Processing Cost) / Unit Cost (Replacement Cost) x Cost to Carry (Carrying Cost Percent)]**

## Economic Order Quantity (EOQ) Adjuster

If the system calculated EOQ falls below the minimum EOQ or above the maximum EOQ, the EOQ will be set to either the minimum EOQ (Less) or maximum EOQ (Greater).

EOQ Adjuster parameters can be set in:

- AIM Company Options Maintenance (MENU AIFILE) on the Advanced Inventory Management Company Options Screen.
- AIM EOQ Parameters Maintenance (MENU AIFILE) on the AIM EOQ Parameter Maintenance Definition Screen.
- Item Balance Maintenance (MENU IAFILE) on the Advanced Inventory Management Information EOQ Screen.
- Interactive Forecasting (MENU AIMAIN / MENU IMMAIN) on the Advanced Inventory Management Information EOQ Screen.

The calculated EOQ can be used in Suggested Orders and Purchasing to determine the purchasing quantity if the EOQ parameters are set to “Use EOQ in Suggested Order”.

## Calculation

**Minimum EOQ = ((Average Monthly Usage / Average Monthly Days) \* (Minimum Weeks Supply \* 7))**

- Round Minimum EOQ

**Maximum EOQ = ((Average Monthly Usage / Average Monthly Days) \* (Maximum Weeks Supply \* 7))**

- Round Maximum EOQ

## Average Sales Quantity (ASQ)

The average sales quantity of an item. All companies will be used unless the transfer company is not included. This value can be used to override the system calculated order point.

The Average Sales Quantity (ASQ) is defined in:

- Replenishment Options Maintenance (MENU AIFILE) on the Advanced Inventory Management Replenishment Options - Adjusters Screen
- Item Balance Maintenance (MENU IAFILE) on the Advanced Inventory Management Information Ordering Screen
- Interactive Forecasting (MENU AIMAIN / MENU IMMAIN) on the Advanced Inventory Management Information Ordering Screen.

## Usage

Calculation Method is **U** for Usage.

- A non-Seasonable item will accumulate previous month's usage for the Standard Usage Months span.
- A Seasonable item will go back one year and then accumulate the months usage going forward for the Standard Usage Months span.

Calculation Method is **H** for History.

- Accumulate one year of previous month's usage history.

## Line Hits

Calculation Method is **U** for Usage.

- A non-Seasonable item will accumulate previous month's hits for the Standard Usage Months span.
- A Seasonable item will go back one year and then accumulate the month's hits going forward for the Standard Usage Months span.

Calculation Method is **H** for History.

- Accumulate one year of previous month's hit history.

If line hits are less than the **ASQ Ignore if Line Hits is less than option** in Replenishment Options Maintenance (MENU AIFILE) on the [Advanced Inventory Management Replenishment Options - Adjusters Screen](#), then the ASQ calculation will not be performed.

## Calculation

**Average Sales Quantity (ASQ) = Usage / Line Hits**

## Five Highest Sales (5-Hi)

An average of the 4 highest sales after the very highest sale is ignored. Only positive sales where the **Update Demand** field is set to **Y** sales are included. If 5 sales are not found, the calculation will not be performed. All companies will be used unless the transfer company is not included. This value can be used to override the system calculated order point.

5-Hi is defined in:

- Replenishment Options Maintenance (MENU AIFILE) on the Advanced Inventory Management Replenishment Options - Adjusters Screen
- Item Balance Maintenance (MENU IAFILE) on the Advanced Inventory Management Information Ordering Screen
- Interactive Forecasting (MENU AIMAIN / MENU IMMAIN) on the Advanced Inventory Management Information Ordering Screen.

## Usage

Calculation Method is **U** for Usage.

- A non-Seasonable item will accumulate the 5 highest sales that occurred during the previous month's usage for the Standard Usage Months span.
- A Seasonable item will go back one year and then accumulate the 5 highest sales that occurred during the month's usage going forward for the Standard Usage Months span.

Calculation Method is **H** for History.

- Accumulate the 5 highest sales that occurred during the one year of previous month's usage history.

---

## Line Hits

Calculation Method is **U** for Usage.

- A non-Seasonable item will accumulate previous month's hits for the Standard Usage Months span.
- A Seasonable item will go back one year and then accumulate month's hits going forward for the Standard Usage Months span.

Calculation Method is **H** for History.

- Accumulate one year of previous month's hit history.

If line hits are less than the **5-HI Ignore if Line Hits is less than** option in Replenishment Options Maintenance (MENU AIFILE) on the [Advanced Inventory Management Replenishment Options - Adjusters Screen](#), this ASQ calculation will not be performed.

## 5-Hi Calculation

**Five Highest Sales (5-Hi) = Usage / 4**

## Lead Time

Total days to receipt divided by given number of receipts over a given months of receipt history equal Lead Time Average.

Default of last two receipts over no time frame is used if no AIM Replenishment Options Lead Time parameters are found.

Do not include receipts where the lead time was not updated (RCLDFG = **N**), receipt quantity is zero or negative (RCRCQT <= **0**), or lead time was ignored (RCIGLT = **Y**).

The calculated lead time and can be adjusted.

## Months of History

Months of history is defined in Replenishment Options Maintenance (MENU AIFILE) on the [Advanced Inventory Management Replenishment Options - Lead Time Screen](#).

- Limit how many months of past receipts should be selected.
- If no AIM Replenishment Options Lead Time parameter is found, no ending time frame will be used for limiting the number of receipts to select.

## Number of Receipts

Number of Receipts is defined in Replenishment Options Maintenance (MENU AIFILE) on the [Advanced Inventory Management Replenishment Options - Lead Time Screen](#).

- For each receipt that is selected, add one to the Number of Receipts.
- Limit how many past receipts should be selected during the Months of History span.
- If no AIM Replenishment Options Lead Time parameter is found, the default number of receipts of 2 will be used.

## Total Days to Receipt

Days to Receipt = Receipt Date – Order Date.

- Add the Days to Receipt to Total Days to Receipt.

## Lead Time Calculation

**Lead Time = Total Days to Receipt / Number of Receipts**

## Lead Time Adjuster

Lead Time adjusters are set in Replenishment Options Maintenance (MENU AIFILE) on the [Advanced Inventory Management Replenishment Options - Lead Time Screen](#). The Lead Time adjusters can be set differently for non-warehouse transfer vendors and warehouse transfer vendors. The vendor that is the primary vendor on the warehouse will determine which adjuster is considered.

If a Lead Time Adjustment was not found in Replenishment Options Maintenance (MENU AIFILE), no Lead Time Adjustment will take place.

If the system calculated lead time falls below the minimum lead time days, then the lead time days will be set to the minimum value setting.

If the system calculated lead time falls above the maximum lead time days, then the lead time days will be set to the maximum value setting.

---

## Safety

Safety will be calculated using a number of days, or as a percentage of Lead Time.

When performed as a percentage of Lead Time, this will calculate a number of days to be used in the below calculation.

Safety Days/Percent are defined in AIM System Options Maintenance (MENU AIFILE) and/or in Replenishment Options Maintenance (MENU AIFILE). This is a two part option: with the days/percent that is used to calculate the actual safety quantity and then the **Assure at Least** and **Assure at Most** days, if the calculated safety days from percent of lead time is less (Least) or more (Most) of these values. The Safety can be set differently for non-warehouse transfer vendors and warehouse transfer vendors. The vendor that is the primary vendor on the warehouse will determine which parameters are used.

Safety cannot be a negative value, otherwise it will be zeroed out.

The calculated Safety quantity will be rounded.

## Safety Days

If entered in Days, then:

- Safety Days = Days.

If entered in Percent, then:

- Safety Days = Lead Time / Percentage.
- See [Safety Adjuster](#).

## Safety Calculation

**Safety = (Average Monthly Usage (AMU) / Average Monthly Days (AMD)) \* Safety Days**

## Safety Adjuster

Safety adjusters are defined in AIM System Options Maintenance (MENU AIFILE) and/or in Replenishment Options Maintenance (MENU AIFILE).

If no safety adjusters are entered, no safety adjustment will be made.

If the system calculated safety days falls below the **Assure at Least days**, then the safety days will be set to the **Assure at Least days** setting.

If the system calculated safety days falls above the **Assure at Most days**, then the safety days will be set to the **Assure at Most days** setting.

## Safety Rounding

Safety Rounding is defined in AIM System Options Maintenance (MENU AIFILE).

If the system calculated safety is greater than 0 but less than 1, and the item has an Average Monthly Usage (AMU) and Safety Rounding is being used, then the following will be performed:

- One year of previous line hits will be accumulated.
- If the total number of hits is greater than or equal to the Minimum Hits and the replacement cost of the item is less than the **Cost if Less than** cost, safety will default to 1.

## Order Point (OP)

The point (inventory level) at which the item should be replenished.

Order Point will be rounded (see [Rounding](#)).

## Order Point Calculation

**Order Point (OP) = ((Average Monthly Usage (AMU) / Average Monthly Days (AMD)) \* Lead Time) + Safety**

## Order Point (OP) Adjuster

Order Point adjusters can be set in:

- Replenishment Options Maintenance (MENU AIFILE) on the Advanced Inventory Management Replenishment Options - Adjusters Screen
- Item Balance Maintenance (MENU IAFILE) on the Advanced Inventory Management Information Ordering Screen
- Interactive Forecasting (MENU AIMAIN / MENU IMMAIN) on the Advanced Inventory Management Information Ordering Screen.

Only the highest of the four Order Point Adjusters will be used.

## Order Point Threshold

- Threshold must be greater than the calculated Order Point.

## Average Sales Quantity (ASQ)

- Calculated ASQ must be greater than the calculated Order Point.
- Cost of increase = (Average Sales Quantity – Calculated Order Point) \* Replacement Cost.
  - Cost of increase cannot exceed the Maximum Value difference, if specified.

## Five Highest Sales (5-Hi)

- Calculated 5-Hi must be greater than the calculated Order Point.
- Cost of increase = (Five Highest Sales – Calculated Order Point) \* Replacement Cost.
  - Cost of increase cannot exceed the Maximum Value difference, if specified.

## Low Usage Adjuster (LUA)

- Calculated Adjuster of 1 must be greater than calculated Order Point of 0.
- Cost of increase = Replacement cost must be less than the Low Usage Adjuster Cost.

## Critical Point (CP)

The point that at which net available inventory falls below; the buyer should be made aware that this product may need to be bought sooner in its regular buying cycle.

## Critical Point Calculation

**Critical Point (CP) = Order Point (OP) - Safety**

## Order Quantity (OQ)

How much inventory should be ordered to cover expected usage until the next expected time that the item will be ordered.

Order Quantity will be rounded (see [Rounding](#)).

## Order Quantity Calculation

**Order Quantity (OQ) = (Average Monthly Usage (AMU) / Average Monthly Days (AMD)) \* Order Frequency**

## Line Point (LP)

The point (inventory level) at which the item should be restocked to.

Line Point will be rounded (see [Rounding](#)).

## Calculation

**Line Point (LP) = Order Point (OP) + Order Quantity (OQ)**

## Chapter 4 Planning Model Analysis

Use the Planning Model Analysis option on the Advanced Inventory Management Main Menu (MENU AIMAIN) to compare actual demand to forecast quantity for a model.

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMMAIN in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Planning Model Analysis option.

## Chapter 5 Exception Center

Exception Center provides the buyer with a way to manage exceptions. Exceptions are generated in Distribution A+ for an item and warehouse when an item's AIM values are changed, and at AIM Month End when you perform the AIM Monthly Update (MENU AIMAST). These exceptions serve as a notification to the buyer to be aware of changes to the item, or to take a closer look at the item's ordering controls. In addition to viewing exceptions, you will have the ability to delete exceptions that you no longer want to see in the Exception Center.

### Exceptions

Exceptions that can be generated in Distribution A+ include:

- Average Sales Quantity – Maximum Amount Exceeded - ASQ
- Discontinued Item with Hits - PWD
- Expiration Date Review - EDR
- Exceptional Usage Corrected - EUS
- 5-Hi Maximum Amount Exceeded - 5HI
- Forecast Accuracy - FCA
- Inventory Value Change (ASQ) - IVA
- Inventory Value Change (5-Hi) - IVF
- Inventory Value Change (Low Usage Adjuster) - IVL
- Inventory Value Change (Threshold) - IVT
- Low Usage Corrected - LUS
- Non-Stock Item with Hits - PWN
- Overridden Item about to Reset - OPR
- Purchase Order Lead Time Review - PLT
- Purchase Order Safety Review - PSR
- Seasonal Trending – Hits Lower than Last Year - SLH
- Seasonal Trending – Hits Lower than This Year - STH
- Seasonal Trending – Percent Greater than Maximum - SHP
- Seasonal Trending – Percent Lower than Minimum - SLP

- Stocked Item Zero OP/LP with Hits - PWS
- Threshold with Low Activity - TLA
- Threshold Ready to Expire - TRE

For each exception that is generated, a screen will be available in the Exception Center. Each screen will have its own appearance and key data points related to the exception, and each will display a message describing the exception. All information on the screens will be display-only.

In order to use the Exception Center, the following must be true:

- Infor Distribution A+ must be at Version 10.02.00 or later
- The Advanced Inventory Management module must be installed in Infor Distribution A+

## Exception Center

The windows in this option and a brief description of their purpose are listed in the following table. A complete description of each is provided in this section.

Title	Purpose
<a href="#">Exception Center Screen</a>	Use to search for and display items with exceptions.
<a href="#">Exception Center - Exception Selection Screen</a>	Use to select the AIM exception(s) that you want to include in the search.
<a href="#">Exception Center - Exception Summary Screen</a>	Use to view items with exceptions that match the search criteria entered.
<a href="#">Exception Center - Exception List Screen</a>	Use to view exception details for the selected item and warehouse.
<a href="#">Exception Center - Average Sales Qty Max Amount Exceeded Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Discontinued Item with Hits Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Expiration Date Review Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Exceptional Usage Corrected Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - 5-Hi Maximum Amount Exceeded Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Forecast Accuracy Screen</a>	Use to view further details for the exception you selected.

Exception Center

Title	Purpose
<a href="#">Exception Center - Inventory Value Change - ASQ Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Inventory Value Change - 5-Hi Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Inventory Value Change - Low Usage Adjuster Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Inventory Value Change - Threshold Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Low Usage Corrected Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Non-Stock Item with Hits Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Overridden Item About to Reset Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Purchase Order Lead Time Review Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - PO Receipt Review Screen</a>	Use to view past receipts and change calculate lead time and/or ignore lead time flags, if needed.
<a href="#">Exception Center - Purchase Order Safety Review Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Seasonal Trending - Hits Lower than Last Year Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Seasonal Trending - Hits Lower than This Year Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Seasonal Trending - Percent Greater than Maximum Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Seasonal Trending - Percent Lower than Minimum Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Stocked Item Zero OP/LP With Hits Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Threshold With Low Activity Screen</a>	Use to view further details for the exception you selected.
<a href="#">Exception Center - Threshold Ready to Expire Screen</a>	Use to view further details for the exception you selected.

## Exception Center Screen

```

                EXCEPTION CENTER

Warehouse?      ...
Item Number?    .....
Buyer?          .....
Warehouse Rank: ..
Vendor?         .....
Item Class?     .../...
Purchasing Line? .....
Exception Limits
All Exceptions: Y
Not Reviewed:  Y
Reviewed:      N

                                F3=Exit

```

This screen appears after you select option **9** - [Exception Center](#) from MENU AIMAIN. You also can access this screen from Buyers Workbench (MENU POREPT) within the Infor Distribution A+ Purchasing User Guide.

Use this screen to search for and display items with exceptions. You can search for AIM exceptions by warehouse, item number, buyer, warehouse rank, vendor, item class/subclass, and purchasing line. You also can select to limit the search to all types of AIM exceptions, those that have not been reviewed or those that have been reviewed.

All items with exceptions that match the search criteria entered will be displayed on the [Exception Center - Exception Summary Screen](#). If you chose not to display all types of AIM exceptions and instead selected to specify certain types of exceptions, you first will be presented with the [Exception Center - Exception Selection Screen](#). A list of exceptions that can be generated in Distribution A+ will be displayed and you will be able to select the AIM exception(s) that you want to include in the search.

### Exception Center Screen Fields and Function Keys

Field/Function Key	Description
Warehouse	<p>Use this field to search for AIM exceptions by warehouse. Key the warehouse ID.</p> <p><b>Note:</b> Only warehouses defined in Distribution A+ to which the signed in user is authorized will display in the warehouse ID list. Warehouse authorization is defined in Distribution A+ through Authority Profile Maintenance (MENU XASCTY).</p> <p><b>Valid Values:</b> A valid warehouse number defined in Distribution A+ through Warehouse Numbers Maintenance (MENU IAFILE), which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).</p> <p>(A 2) Optional</p>
Item Number	<p>Use this field to search for AIM exceptions by item number. Key a valid item number.</p> <p><b>Valid Values:</b> An item number defined through Distribution A+ Item Master Maintenance (MENU IAFILE).</p> <p>(A 27) Optional</p>
Buyer	<p>Use this field to search for AIM exceptions by the buyer codes (usually buyer's initials) assigned to items. Key the buyer code.</p> <p><b>Note:</b> If this screen is accessed from Buyers Workbench (MENU POREPT), via the <b>F10=EXC CENTER</b> function key on the Workbench Suggested Orders List Screen, the <b>Buyer ID</b> that was found for the user will display in this field.</p> <p>(A 3) Optional</p>
Warehouse Rank	<p>Use this field to search for AIM exceptions by warehouse rank (the warehouse rank letter of the item). Ranking items in a warehouse allows for the flagging of top selling items by ranks. Ranking values are defined through Replenishment Options Maintenance (MENU AIFILE).</p> <p>Key the from and to range of warehouse ranks.</p> <p><b>Valid Values:</b> Any letter from A to Z (2 @ A 1) Optional</p>

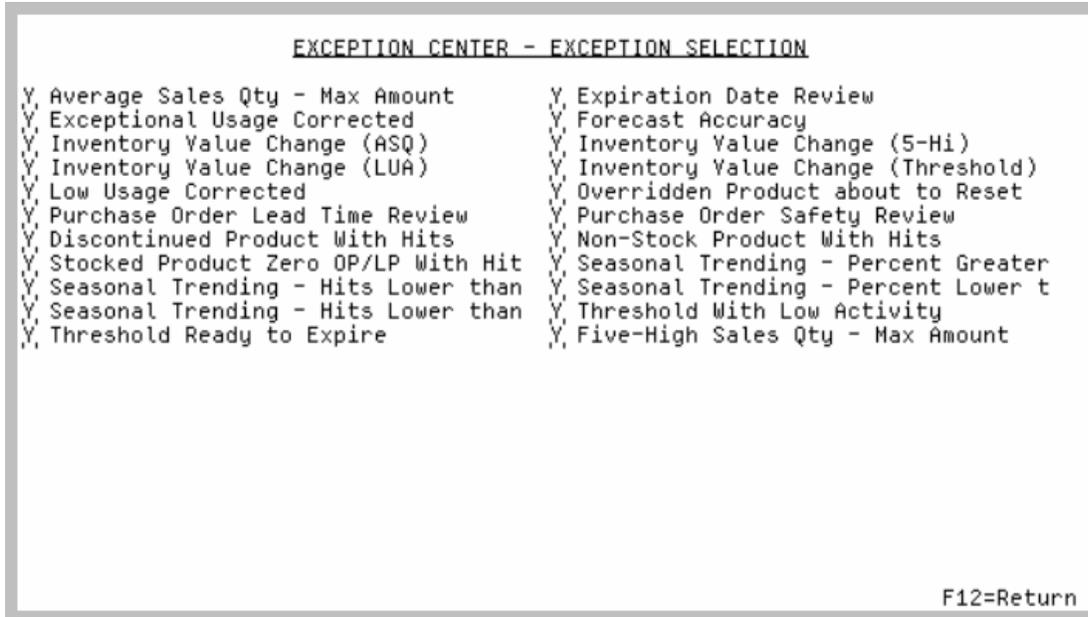
Field/Function Key	Description
Vendor	<p>Use this field to search for AIM exceptions by vendor number. Key the appropriate vendor.</p> <p><b>Note:</b> If you select a vendor, the purchasing lines will filter to only show purchasing lines that are linked to this vendor. If you do not select a vendor and you select a purchasing line, the vendor will automatically be set to a vendor associated with the purchasing line selected, if appropriate.</p> <p><b>Valid Values:</b> A valid vendor defined through Vendor Master Maintenance (MENU POFIL2/MENU APFILE). (N 10,0) Optional</p>
Item Class	<p>Use this field to search for AIM exceptions by item class and sub-class, if applicable.</p> <p>Key the item class and sub-class, if applicable. Only items that have been assigned the item class and sub-class, if applicable, will be included in the search.</p> <p>(A 2/ A 2) Optional</p>
Purchasing Line	<p>Use this field to search for AIM exceptions by purchasing line. Purchasing lines can be assigned to a vendor and optional warehouse through Distribution A+ Purchasing Line Maintenance (MENU POFIL2). Purchasing lines provide you with a way to group like items together.</p> <p>Key the purchasing line.</p> <p><b>Note:</b> If you select a vendor in the <b>Vendor</b> search field, the purchasing lines will filter to only show purchasing lines that are linked to the vendor you selected. If you do not select a vendor and you select a purchasing line, the vendor will automatically be set to a vendor associated with the purchasing line selected, if appropriate. Additionally, if you select a purchasing line and there is a warehouse associated with the purchasing line, the warehouse will be automatically selected when a new purchasing line is selected.</p> <p>(A 10) Optional</p>

Field/Function Key	Description
Exception Limits: All Exceptions	<p>Use this field to limit exceptions that display.</p> <p>Key <b>Y</b> to include all types of AIM exceptions. If you key <b>Y</b>, the <a href="#">Exception Center - Exception Summary Screen</a> will display. The <a href="#">Exception Center - Exception Selection Screen</a> will be bypassed when you select to search for all exceptions.</p> <p>Key <b>N</b> if you do not want to include all types of AIM exceptions, and instead want to select specific types of exceptions. If you key <b>N</b>, the <a href="#">Exception Center - Exception Selection Screen</a> will display to present a list of exceptions that can be generated in Distribution A+. You will be able to select the AIM exception(s) that you want to include in the search.</p> <p><b>Default Value:</b> Y (A 1) Required</p>
Exception Limits: Not Reviewed	<p>Use this field to limit exceptions that display.</p> <p>Key <b>Y</b> to include exceptions which have not yet been reviewed.</p> <p>Key <b>N</b> to exclude exceptions which have not yet been reviewed.</p> <p>If the <b>Exception Limits: All Exceptions</b> field is <b>Y</b>, the <a href="#">Exception Center - Exception Summary Screen</a> will display and include or exclude (depending on this field) all types of exceptions which have not been reviewed. If the <b>Exception Limits: All Exceptions</b> field is <b>N</b>, the <a href="#">Exception Center - Exception Selection Screen</a> will display and allow you to select the AIM exception(s) that you want to include in the search.</p> <p><b>Note:</b> This field and the <b>Exception Limits: Reviewed</b> field cannot both be <b>N</b>.</p> <p><b>Default Value:</b> Y (A 1) Required</p>
Exception Limits: Reviewed	<p>Use this field to limit exceptions that display.</p> <p>Key <b>Y</b> to include exceptions which have been reviewed.</p> <p>Key <b>N</b> to exclude exceptions which have been reviewed.</p> <p>If the <b>Exception Limits: All Exceptions</b> field is <b>Y</b>, the <a href="#">Exception Center - Exception Summary Screen</a> will display and include or exclude (depending on this field) all types of exceptions which have been reviewed. If the <b>Exception Limits: All Exceptions</b> field is <b>N</b>, the <a href="#">Exception Center - Exception Selection Screen</a> will display and allow you to select the AIM exception(s) that you want to include in the search.</p> <p><b>Note:</b> This field and the <b>Exception Limits: Not Reviewed</b> field cannot both be <b>N</b>.</p> <p><b>Default Value:</b> N (A 1) Required</p>

Field/Function Key	Description
F3=Exit	Press <b>F3=EXIT</b> to cancel this option and return to MENU AIMAIN.
Enter	Press <b>ENTER</b> to confirm your selections. The <a href="#">Exception Center - Exception Selection Screen</a> or <a href="#">Exception Center - Exception Summary Screen</a> will display, depending on your response in the <b>Exception Limits: All Exceptions</b> field.

---

## Exception Center - Exception Selection Screen



This screen appears after you press **ENTER** on the [Exception Center Screen](#), if you keyed **N** in the **Exception Limits: All Exceptions** field on that screen.

This screen displays AIM exception(s) that can be generated in Distribution A+; there are 22 possible exceptions. Descriptions of exceptions are from Exception Reason Code Maintenance.

Use this screen to select/limit the exceptions that you want to include in the search.

### Exception Center - Exception Selection Screen Fields and Function Keys

Field/Function Key	Description
AIM exception(s)	Use this field to limit the AIM exception(s) that you want to include in the search.  Key <b>Y</b> preceding the exception(s) that you want to include in the search.  Key <b>N</b> preceding the exception(s) that you want to exclude in the search.  <b>Valid Values:</b> Y or N; All options cannot be N (N 1,0) Required
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center Screen</a> , without saving any additions/changes made to this screen.
Enter	Press <b>ENTER</b> to confirm your selections. The <a href="#">Exception Center - Exception Summary Screen</a> will appear.

## Exception Center - Exception Summary Screen

```

                EXCEPTION CENTER - EXCEPTION SUMMARY
SI R WH Item Number      Item Description 1
1 Y 1  A130              Sharp Extra Sensitive Fax Paper
  PLT,PSR,TLA
2 Y 2  A150              3-Ring Binder - 2" Red
  IYL,LUS,OPR,PSR,PWD,PWN,PWS,SHP,SLH,SLP
3 N 1  A200              Sharp Copier Toner xx
  ASQ,EDR,EUS,FCA,IYA,IYF,IYL,IYT,LUS,OPR,PLT,PSR,PWD,PWN,PWS,SHP,SLH,SLP,STH,TLA

Select: , ,
F2=Desc-2'  F3=Exit  F4=Hits/Cost
                                                    Last
                                                    F12=Return
  
```

This screen appears after you press **ENTER** on the [Exception Center Screen](#), if you keyed **Y** in the **Exception Limits: All Exceptions** field on that screen.

All items with exceptions that match the search criteria entered will be displayed on this screen. Exceptions which have or have not been reviewed will be included or excluded, depending on exception limits entered on the [Exception Center Screen](#).

The records on this screen will be sorted by item number and warehouse. There may be multiple records for the same item if exceptions exist in multiple warehouses for that item.

The fields on this screen are from the AIM Exception Summary File (**AIESUM**), AIM Balance File (**AIBAL**), Item Balance File (**ITBAL**), Item Master File (**ITMST**), and the Vendor Master File (**VENDR**).

### Exception Center - Exception Summary Screen Fields and Function Keys

Field/Function Key	Description
SI	This is the reference number of the corresponding line. To select one of the displayed lines, key this number in the <b>Select</b> field on the lower portion of the screen. Display

Field/Function Key	Description
R	<p>Indicates (by <b>Y</b> or <b>N</b>) if the Exception Summary record has already been reviewed.</p> <p>Exceptions which have or have not been reviewed will be included or excluded, depending on exception limits entered on the <a href="#">Exception Center Screen</a>.</p> <p>Display</p>
WH	<p>This field appears depending on the <b>F4</b> toggle function key.</p> <p>This field displays the warehouse ID for which an AIM exception record exists.</p> <p>Display</p>
Item Number	<p>This field appears depending on the <b>F4</b> toggle function key.</p> <p>This field displays the item number for which an AIM exception record exists.</p> <p>Display</p>
Item Description 1/ Item Description 2	<p>This field appears depending on the <b>F4</b> toggle function key. This field displays the first line of the description of the item.</p> <p>This field can be toggled to show the second line of the description of the item using the <b>F2=DESC-1 / F2=DESC-2</b> toggle function key.</p> <p>Display</p>
One Yr Hits	<p>This field appears depending on the <b>F4</b> toggle function key.</p> <p>The field displays the total number of one year of line hits for the item at the time of exception, for one year (the current period and the past 11 or 12 periods, depending on if a 12 or 13 period system is being used).</p> <p>Line hits are the number of times this item appears on a sales order, warehouse transfer, or lost business transaction, regardless of quantity or the unit of measure.</p> <p>Display</p>

Field/Function Key	Description
Unit Cost	<p>This field appears depending on the <b>F4</b> toggle function key.</p> <p>This field displays the replacement cost of the item in the default unit of measure of the item.</p> <p>Replacement cost is the cost to replace (purchase) an item. It is determined in the following order:</p> <ul style="list-style-type: none"> <li>• Cost will default to the Item Balance <b>Standard, User, or Average Cost</b>, depending on the defined <b>Cost to be Used for GL</b> option.</li> <li>• If cost is zero and Item Balance average cost has a value, it will default to the Item Balance <b>Average Cost</b>.</li> <li>• When the primary vendor for the item is not a warehouse transfer vendor and there is a vendor/item record, the vendor/item cost will be used.</li> <li>• When the primary vendor for the item is a warehouse transfer vendor, the <b>Base Price Code</b> from Purchasing Options Maintenance (MENU XAFILE) on the Purchasing Warehouse Options Screen will be used.</li> </ul> <p>Display</p>
U/M	<p>This field appears depending on the <b>F4</b> toggle function key.</p> <p>This field displays the default unit of measure for the item.</p> <p>Display</p>
Curr	<p>This field appears depending on the <b>F4</b> toggle function key.</p> <p>This field displays the default local currency for the company that controls the warehouse, except for when the vendor is a warehouse transfer and then the system default local currency will be shown.</p> <p>Display</p>
Rank	<p>This field appears depending on the <b>F4</b> toggle function key. This field displays the warehouse rank letter for the item.</p> <p>Ranking items in a warehouse allows for the flagging of top selling items by ranks. Ranking values are defined through Replenishment Options Maintenance (MENU AIFILE). The number of ranks defined; determines the value you can key to rank an item. For example, if you key 4 for the number of ranks to be used, then the first 4 letters in the alphabet will be allowed to be used to rank your items (A, B, C, or D).</p> <p>Display</p>
Item Class	<p>This field appears depending on the <b>F4</b> toggle function key.</p> <p>This field displays the class of the item.</p> <p>Display</p>

Field/Function Key	Description
Item Subclass	<p>This field appears depending on the <b>F4</b> toggle function key.</p> <p>This field displays the subclass, if any, of the item.</p> <p>Display</p>
Buyer Name	<p>This field appears depending on the <b>F4</b> toggle function key.</p> <p>This field displays the buyer who is responsible for purchasing the item.</p> <p>This is the buyer who was used on the most recent exception and from the AIM Exception Summary File (<b>AIESUM</b>).</p> <p>Display</p>
Vendor Name	<p>This field appears depending on the <b>F4</b> toggle function key.</p> <p>This field displays the name of the primary vendor assigned to an item through Item Master Maintenance (MENU IAFILE).</p> <p>Display</p>
Purchasing Line	<p>This field appears depending on the <b>F4</b> toggle function key.</p> <p>This field displays the Purchasing Line, if any, assigned to the vendor and optional warehouse through Distribution A+ Purchasing Line Maintenance (MENU POFIL2). Purchasing lines provide you with a way to group like items together.</p> <p>Display</p>
Select	<p>This field allows you to view further exception details for a particular item.</p> <p>Key the <b>Reference Number</b> of the item you want to view exception details for, and press <b>ENTER</b>. The <a href="#">Exception Center - Exception List Screen</a> will appear.</p> <p>(N 1,0) Optional</p>
F2=Desc-1 / F2=Desc-2	<p>This toggle function displays when the <b>F4</b> toggle function key appears as <b>F4=HITS/COST</b>.</p> <p>Press <b>F2=DESC-1</b> / <b>F2=DESC-2</b> to toggle between showing the first or second line of the description of the item on the top portion of this screen.</p>
F3=Exit	<p>Press <b>F3=EXIT</b> to cancel this option and return to MENU AIMAIN.</p>
F4=Hits/Cost / F4=Rank/Class / F4=Buyer/Vendor / F4=Purchasing Line / F4=Wh/Item	<p>Press the <b>F4</b> toggle function key to toggle between a display of:</p> <ul style="list-style-type: none"> <li>• Warehouse, Item Number, and Item Description 1 (and 2 with F2 toggle key)</li> <li>• One Year Hits, Unit Cost, U/M and Currency</li> <li>• Warehouse Rank, Item Class, and Item Subclass</li> <li>• Buyer Name and Vendor Name</li> <li>• Purchasing Line</li> </ul>

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Field/Function Key	Description
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center Screen</a> or <a href="#">Exception Center - Exception Selection Screen</a> , without saving any additions/changes made to this screen.
Enter	Press <b>ENTER</b> after keying a value in the <b>Select</b> field to display further exception details of the item you select. The <a href="#">Exception Center - Exception List Screen</a> will appear.

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Field/Function Key	Description
WH Rank	<p>This field displays the line hit rank of the item.</p> <p>Ranking is a method of classification of products based on "hits," or the number of times this product appears on a sales order, warehouse transfer, or lost business transaction. (Hits may also be called issues, velocity, or frequency.) You can define the number of ranks that you track as well as the scope for each rank. The scope can be the number of hits or percentage of hits that occur during a set period. For example, if you select Percentage of Hits, and rank A is defined as 80%, the top 80% of line hits define the products that fall into rank A.</p> <p>Display</p>
Discontinued	<p>Indicates (by <b>Y</b> or <b>N</b>) if the item has been marked as discontinued through Item Balance Maintenance (MENU IAFILE), or if no flag there, then through Item Master Maintenance (MENU IAFILE).</p> <p>Display</p>
Update Inventory	<p>Indicates (by <b>Y</b> or <b>N</b>) if the item updates on-hand inventory balances.</p> <p>Display</p>
ABC Code	<p>This field displays the ABC code currently in the Distribution A+ Item Balance File (<b>ITBAL</b>). An ABC code is created through ABC Codes Maintenance (MENU IAFIL2) and may be manually assigned to an item through Item Balance Maintenance (MENU IAFILE). If a code was not assigned to an item, this column is blank.</p> <p>Items are ranked by their ABC code based on any one of the following:</p> <ul style="list-style-type: none"> <li>• Sales</li> <li>• Cost</li> <li>• Profit</li> <li>• Quantity Sold</li> </ul> <p>Display</p>
Buyer	<p>This field displays the buyer code who is responsible for purchasing the item.</p> <p>This is the buyer who was used on the most recent exception and from the AIM Exception Summary File (<b>AIESUM</b>).</p> <p>Display</p>
SI	<p>This is the reference number of the corresponding line. To select one of the displayed lines, key this number in the <b>Select</b> field on the lower portion of the screen.</p> <p>Display</p>

Field/Function Key	Description
R	<p>This column indicates (by <b>Y</b> or <b>N</b>) if the Exception record has already been reviewed.</p> <p>Exceptions which have or have not been reviewed will be included or excluded, depending on exception limits entered on the <a href="#">Exception Center Screen</a>.</p> <p>Display</p>
Exception	<p>This column displays the exception(s) that were generated in Distribution A+ for the item and warehouse. For a list of exceptions that can be generated, refer to <a href="#">Exceptions</a>.</p> <p>Display</p>
User Date/Time/Zone	<p>These fields appear depending on the <b>F2</b> toggle function key. The date and time at which the exception occurred shown in relation to your default time zone is displayed.</p> <p>Display</p>
Actual Date/Time/ Zone	<p>These fields appear depending on the <b>F2=ACTUAL DATE/TIME / F2=SYSTEM DATE/ TIME / F2=USER DATE/TIME</b> toggle function key.</p> <p>The date and time at which the exception occurred shown in relation to the time zone of the user is displayed.</p> <p>Display</p>
System Date/Time/ Zone	<p>These fields appear depending on the <b>F2</b> toggle function key. The date on which the exception occurred shown in relation to the system's default time zone is displayed.</p> <p>Display</p>
Select	<p>This field allows you to view further exception details for a particular item.</p> <p>Key the reference number of the item you want to view exception details for, and press <b>ENTER</b>. The corresponding exception screen will appear.</p> <p>(N 1,0) Optional</p>
F2=Actual Date/Time/ F2=System Date/Time/ F2=User Date/Time	<p>Press the <b>F2=ACTUAL DATE/TIME / F2=SYSTEM DATE/TIME / F2=USER DATE/TIME</b> toggle function key to toggle between a display of:</p> <ul style="list-style-type: none"> <li>the date and time at which the exception occurred shown in relation to the time zone of the user</li> <li>the date and time at which the exception occurred shown in relation to the time zone of the user</li> <li>the date on which the exception occurred shown in relation to the system's default time zone</li> </ul>

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Field/Function Key	Description
F3=Exit	Press <b>F3=EXIT</b> to cancel this option and return to MENU AIMAIN.
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception Summary Screen</a> , without selecting on this screen.
Enter	Press <b>ENTER</b> after keying a value in the <b>Select</b> field to display further exception details of the item you select. The corresponding exception screen will appear.

---

## Exception Center - Average Sales Qty Max Amount Exceeded Screen

EXCEPTION CENTER - ASQ EXCEPTION			
Average Sales Quantity - Maximum Amount Exceeded			
Item Number: A200			Warehouse: 1
The Average Sales Quantity Order Point Adjuster was not used to adjust Order Point because the maximum currency limit of 100.00 was exceeded as the ASQ Calculated Currency Difference was 5,000.00.			
ASQ Values/Calculations			
Calc Order Point:	100.000	Calc Currency Diff:	5,000.00
Calc Line Point:	110.000	Calculated Usage:	40.000
Line Hits:	100		
Other Adjuster Calculations			
5-Hi Order Point:	3.000	Threshold Order Point:	2.000
Low Usage OP:	1.000		
Values at Time of Exception			
Calc OP:	40.000	# Mths Usage:	6
Calc LP:	50.000	Usage Method:	B
		Usage Rate:	20
		Safety Qty:	10
Parameter Settings and Record Levels			
Min Hits Req'd:	2	Lvl: Company	Incl XFERs: N Lvl: Company
Max Currency Diff:	100.00	Lvl: Company	
F5=Mark as Reviewed		F9=Item Usage	F12=Return F24=Delete

This screen appears after you select an ASQ - Maximum Amount Exceeded exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for an ASQ - Maximum Amount Exceeded exception.

All fields on this screen are for viewing purposes only.

### Exception Center-Average Sales Qty Max Amount Exceeded Screen Fields/Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG/F7=ABBR MSG</b> for further details.
ASQ Values/Calculations	
Calc Order Point	The value of the ASQ calculated order point/min.

Field/Function Key	Description
Calc Line Point	The value of the ASQ calculated line point/max.
Line Hits	The total line hits for the item during the calculation method time period used for the ASQ calculation, indicating the number of times the product appeared on a sales order, warehouse transfer, or lost business transaction, regardless of quantity.
Calc Currency Diff	The difference between the ASQ calculated order point value and values at the time of the exception calculated order point value.
Calculated Usage	The total usage for the item during the ASQ calculation method time period used for the ASQ calculation.
<b>Other Adjuster Calculations</b>	
5-Hi Order Point	The calculated 5-Hi order point.
Low Usage OP	The calculated Low Usage Adjuster order point. Threshold Order Point The Calculated Threshold order point.
<b>Values at Time of Exception</b>	
Calc OP	The calculated order point, at time of exception, without the ASQ order point adjuster applied.
Calc LP	The calculated line point, at time of exception, without the ASQ order point adjuster applied.
# Mths Usage	The number of months used, at time of exception, to determine the total item usage.
Usage Method	The method used to determine, at time of exception, the total item usage (for example, <b>Backward</b> method).
Usage Rate	The total item usage, at time of exception.
Safety Qty	The safety quantity value, at time of exception.
<b>Parameter Settings and Record Levels</b>	
Min Hits Req'd	The minimum number of hits used for the ASQ calculation.

Field/Function Key	Description
Lvl	<p>The level where the <b>Min Hits</b> was retrieved from (for example, System).</p> <p>This field displays the text representing the assigned value.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Max Currency Diff	<p>The maximum value difference used for the ASQ calculation.</p>
Lvl	<p>The level where the <b>Max Currency Diff</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Incl XFERS	<p>Indicates with <b>Y</b> (Yes) or <b>N</b> (No) if warehouse transfers were used for the ASQ calculation.</p>

Field/Function Key	Description
Lvl	<p>The level where the value of <b>Incl XFERS</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

### Function Keys

<p>F5=Mark as Reviewed F5=Mark for Review</p>	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
<p>F7=Full Msg / F7=Abbr Msg</p>	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>

Field/Function Key	Description
F9=Item Usage	Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management & Planning User Guide for details about this screen.
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a> .
F24=Delete	Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> .

## Exception Center - Discontinued Item with Hits Screen

```

                EXCEPTION CENTER - PWD EXCEPTION
                Discontinued Item with Hits
Item Number: A200                               Warehouse: 1

There have been 145 hits recorded against this product in the last 3 months.

Values at Time of Exception
-----
Order Point:      25.000  Maintenance Code: A  Status: Discontinued
Line Point:      175.000  Maintenance Code: 0  Hits:              145
Parameter Settings and Record Levels
-----
Months to Use:      3  Level: Company
Minimum Hits:      25  Level: Company

F5=Mark as Reviewed      F9=Item Usage      F12=Return      F24=Delete

```

This screen appears after you select a Discontinued Item with Hits exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

For the purposes of the *Discontinued Product with Hits* (PWD) exception, an item is considered discontinued if it was defined as **Discontinued = Y** in Item Balance Maintenance (MENU IAFILE), or if no flag there, in Item Master Maintenance (MENU IAFILE), regardless of the Item Balance **Plan** flag.

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Discontinued Item with Hits exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Discontinued Item with Hits Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG/F7=ABBR MSG</b> for further details.

Field/Function Key	Description
Order Point	<p>The order point for the item, at time of exception.</p> <p>For items not being planned (i.e., the <b>Plan</b> field is set to <b>N</b> in Item Balance Maintenance), this field will be zero.</p>
Maintenance Code	<p>The maintenance code for the corresponding order point.</p> <p><b>A</b> (Automatic) displays if the variable is maintained automatically.</p> <p><b>O</b> (Override) displays if the variable has been permanently overridden by the value shown.</p> <p><b>1-9</b> (number of months) displays if the variable has been temporarily overridden for the number of months specified.</p> <p>For items not being planned (i.e., the <b>Plan</b> field is set to <b>N</b> in Item Balance Maintenance), this field will be blank.</p>
Status	<p>The status of the item, at time of exception.</p> <p><b>Discontinued</b> indicates the item was defined as <b>Discontinued = Y</b> in Item Balance Maintenance (MENU IAFILE), or if no flag there, in the Item Master Maintenance (MENU IAFILE), regardless of the Item Balance <b>Plan</b> flag.</p>
Line Point	<p>The line point for the item, at time of exception.</p> <p>For items not being planned (i.e., the <b>Plan</b> field is set to <b>N</b> in Item Balance Maintenance), this field will be zero.</p> <p>Maintenance CodeThe maintenance code for the corresponding line point.</p> <p><b>A</b> (Automatic) displays if the variable is maintained automatically.</p> <p><b>O</b> (Override) displays if the variable has been permanently overridden by the value shown.</p> <p><b>1-9</b> (number of months) displays if the variable has been temporarily overridden for the number of months specified.</p> <p>For items not being planned (i.e., the <b>Plan</b> field is set to <b>N</b> in Item Balance Maintenance), this field will be blank.</p>
Hits	<p>The total number of line hits for the item during the <b>Months to Use</b> time frame, at time of exception. Line hits are the number of times this item appears on a sales order, warehouse transfer, or lost business transaction, regardless of quantity or the unit of measure.</p>
<b>Parameter Settings and Record Levels</b>	
Months to Use	<p>Reflects how many months of hit data will be used with the Discontinued Item with Hits exception.</p>

Field/Function Key	Description
Level	<p>The level where the value of the <b>Months to Use</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Minimum Hits	<p>The minimum number of hits that must be met or exceeded in the number of months time frame for the exception.</p>
Level	<p>The level where the value of the <b>Minimum Hits</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <p>1 = Subclass  2 = Class  3 = PLine  4 = Vendor  5 = Warehouse  6 = Company  7 = System  S = Sys Dft  I = Item/WH  C = Company  P = PLine  V = Vendor  W = Warehouse</p>
<b>Function Keys</b>	

Field/Function Key	Description
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the message may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Expiration Date Review Screen

```

EXCEPTION CENTER - EDR EXCEPTION
Expiration Date Review
Item Number: A200 Warehouse: 1
The Order Frequency override will expire after 3 Monthly Updates.

Values/Calculations
Field Expiring: Order Frequency Maintenance Code: 3

Parameter Settings and Record Levels
Expiration Maintenance Code: 3 Level: Company

F5=Mark as Reviewed F9=Item Usage F12=Return F24=Delete

```

This screen appears after you select an Expiration Date Review exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for an Expiration Date Review exception.

A variety of overrides that are expiring may be displayed. Two different modes of this screen exist. One mode is for maintenance codes and the other mode is for actual dates. For example, Order Frequency is a maintenance code but Five High Sales Order Point Adjuster is an actual date.

Maintenance codes are for:

- Order Frequency
- Lead Time
- Safety Stock
- Order Quantity
- WH Line Hit Rank

Expiration dates are for:

- Average Sales Quantity Order Point Adjuster
- Five High Sales Order Point Adjuster
- Low Usage Order Point Adjuster
- Seasonal Trending

- Seasonal Line-Up

All fields on this screen are for viewing purposes only.

### Exception Center - Expiration Date Review Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG/F7=ABBR MSG</b> for further details.

### Values/Calculations

Field Expiring	<p>The function that expired or will be expiring on the date shown in the Expiration Date field.</p> <p>Functions include:</p> <ul style="list-style-type: none"><li>• Order Frequency</li><li>• Lead Time</li><li>• Safety Stock</li><li>• Order Quantity</li><li>• WH Line Hit Rank</li><li>• Average Sales Quantity Order Point Adjuster</li><li>• Five High Sales Order Point Adjuster</li><li>• Low Usage Order Point Adjuster</li><li>• Seasonal Trending</li><li>• Seasonal Line-Up</li></ul>
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Field/Function Key	Description
Expiration Date OR Maintenance Code	<p>This field displays as either <b>Expiration Date</b> or <b>Maintenance Code</b> depending on the type of expiration date (i.e., maintenance code or the actual date).</p> <p>If this field displays as <b>Expiration Date</b>, this field displays the date the function shown in the <b>Field Expiring</b> field expired or will be expiring.</p> <p>Functions include:</p> <ul style="list-style-type: none"> <li>• Average Sales Quantity Order Point Adjuster</li> <li>• Five High Sales Order Point Adjuster</li> <li>• Low Usage Order Point Adjuster</li> <li>• Seasonal Trending</li> <li>• Seasonal Line-Up</li> </ul> <p>If this field displays as <b>Maintenance Code</b>, this field displays the number of monthly updates remaining before the override for the <b>Field Expiring</b> field will be reset to <b>A</b> for Automatic.</p> <p>Maintenance Codes include: Order Frequency, Lead Time, Safety Stock, Order Quantity and Warehouse Line Hit Rank.</p>

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### Parameter Settings and Record Levels

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Field/Function Key	Description
Expiration Days OR Expiration Maintenance Code	<p>This field displays as either <b>Expiration Days</b> or <b>Expiration Maintenance Code</b> depending on the type of expiration date (i.e., maintenance code or the actual date).</p> <p>If this field displays as <b>Expiration Days</b>, this field displays the expiration days value used by AIM month-end to determine if an exception (called the <i>Expiration Date Review</i> (EDR)) will occur when various functions are close to expiring.</p> <p>Functions include:</p> <ul style="list-style-type: none"><li>• Average Sales Quantity Order Point Adjuster</li><li>• Five High Sales Order Point Adjuster</li><li>• Low Usage Order Point Adjuster</li><li>• Seasonal Trending</li><li>• Seasonal Line-Up</li></ul> <p>If the expiration will occur within the number of days identified in this field, it will trigger an exception to occur.</p> <p>If this field displays as <b>Expiration Maintenance Code</b>, this field displays the expiration maintenance code value used by AIM month-end to determine if an exception (called the <i>Expiration Date Review</i> (EDR)) will occur when various functions are close to expiring.</p> <p>Functions include:</p> <ul style="list-style-type: none"><li>• Order Frequency</li><li>• Lead Time</li><li>• Safety Stock</li><li>• Order Quantity</li><li>• WH Line Hit Rank</li></ul> <p>If the expiration will occur within the number of monthly updates identified in this field, it will trigger an exception to occur.</p>

Field/Function Key	Description
Level	<p>The level where the value of the <b>Expiration Days</b> or <b>Expiration Maintenance Code</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

### Function Keys

<p>F5=Mark as Reviewed F5=Mark for Review</p>	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the R (reviewed) column.</p>
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Field/Function Key	Description
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Exceptional Usage Corrected Screen

```

                EXCEPTION CENTER - EUS EXCEPTION
                Exceptional Usage Corrected
Item Number: A200                               Warehouse: 1

This product's monthly usage of 120.000 has exceeded the combined average
usage of 110.000 for the prior 6 months. A new monthly usage of 11.000 has
been calculated based on the Exceptional Usage Rate Multiplier of 10.00.

Calculated Values
-----
New Order Point:          50.000      New Line Point:          200.000
New Usage:                11.000
Total Prior Usage:       660.000      Average Usage:          110.000
Values at Time of Exception
-----
Calculated OP:           50.000      Calculated LP:           300.000
Monthly Usage:          120.000
Parameter Settings and Record Levels
-----
Ovr %:      10.00  Lvl: Class      Mths of Prior Usg:  6  Lvl: PLine
Min Qty:    20    Lvl: Subclass  Override Reason:  HI  Lvl: Subclass
Override Description:  OVERRIDE

F5=Mark as Reviewed          F9=Item Usage   F12=Return   F24=Delete

```

This screen appears after you select an Exceptional Usage Corrected exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for an Exceptional Usage Corrected exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Exceptional Usage Corrected Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.
<b>Calculated Values</b>	
New Order Point	The Order Point that was calculated using the New Usage.
New Line Point	The Line Point that was calculated using the New Usage.

Field/Function Key	Description
New Usage	The new monthly usage.
Total Prior Usage	The Total Usage in prior periods.
Average Usage	The average usage rate determined at time of exception, based on the number of months used to calculate usage. <b>Calculation:</b> Total prior usage divided by the months of prior usage.
<b>Values at Time of Exception</b>	
Calculated OP	The calculated order point, at time of exception, without the Exceptional Usage adjuster applied.
Calculated LP	The calculated line point, at time of exception, without the Exceptional Usage adjuster applied.
Monthly Usage	The exceptional monthly usage before adjustment.
<b>Parameter Settings and Record Levels</b>	
Ovr %	The percent applied, if designated, to the item's average usage to arrive at an adjustment value to reduce the exceptional usage. For example, you might want to bring any exceptional usage values back down to only be 10% above average, so 10 would appear.
Lvl	The level where the value of the <b>OvR %</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign. <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

Field/Function Key	Description
Mths of Prior Usg	The number of months previous usage of the item, allowing for reliable for replenishment recommendations.
Lvl	<p>The level where the value of the <b>Mths of Prior Usg</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Min Qty	<p>The minimum quantity of usage that must be met during the past month for the system to evaluate the item for exceptional usage. That is, for an AIM planned item being processed via month-end, if the demand quantity of the item meets the <b>Minimum Qty</b> specified in this field, the system will calculate an average usage for the item and compare that to the usage being processed via this month-end. If the usage of the item being processed via this month- end exceeds the average usage, then an exception is generated, if designated to do so (in AIM Replenishment Options Maintenance (MENU AIFILE)).</p>

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Min Qty</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Override Reason	<p>The reason the usage override occurred. This default reason code is used when designated to do so (in AIM Replenishment Options Maintenance (MENU AIFILE)), and an adjustment is being written to the Item Sales Demand Manual Adjustments File (<b>ITADJ</b>).</p>

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Override Reason</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Override Description	<p>The description for the <b>Override Reason</b>, as determined through AIM Usage Override Reason Codes Maintenance (MENU AIFILE).</p>
<b>Function Keys</b>	
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>

Field/Function Key	Description
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the message may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - 5-Hi Maximum Amount Exceeded Screen

EXCEPTION CENTER - 5HI EXCEPTION				
5-Hi Maximum Amount Exceeded				
Item Number: A200	Warehouse: 1			
The 5-Hi Order Point Adjuster was not used to adjust Order Point because the maximum currency limit of 60.00 was exceeded as the 5-Hi Calculated Currency				
<u>5-Hi Values/Calculations</u>				
Calc Order Point:	50.000	Calc Currency Diff:	100.00	
Calc Line Point:	60.000	Calc Quantity:	30.000	
Qty:	10.000	15.000	20.000	25.000 500.000 *
Dte:	11/21/17	11/21/17	11/21/17	11/21/17 11/21/17
Ord:	01/11110/00	01/11115/01	01/11120/03	01/11130/00 01/11300/00
* Highest quantity excluded from calculation				
<u>Other Adjuster Calculations</u>				
ASQ Order Point:	3.000	Threshold Order Point:	2.000	
Low Usage OP:	1.000			
<u>Values at Time of Exception</u>				
Calc OP:	20.000	# Mths Usage:	6	Usage Rate: 40
Calc LP:	30.000	Usage Method:	B	Safety Qty: 10
<u>Parameter Settings and Record Levels</u>				
Min Hits Req'd:	5	Lvl: Company	Incl XFERs: N	Lvl: Company
Max Currency Diff:	60.00	Lvl: Company		
F5=Mark as Reviewed F7=Full Msg F9=Item Usage F12=Return F24=Delete				

This screen appears after you select a 5-Hi Maximum Amount Exceeded exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a 5-Hi Maximum Amount Exceeded exception.

All fields on this screen are for viewing purposes only.

### Exception Center - 5-Hi Maximum Amount Exceeded Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.

### 5-Hi Values/Calculations

Field/Function Key	Description
Calc Order Point	The value of the 5-Hi calculated order point/min.
Calc Line Point	The value of the 5-Hi calculated line point/max.
Calc Currency Difference	The difference between the 5-Hi calculated order point value and values at the time of the exception calculated order point value.
Calc Quantity	The calculated 5-Hi order point quantity.
Qty	<p>The 5-Hi quantity used in each of the sales columns (sales 1 through 5) are listed. The 5-Hi calculation reviews the five highest sales for the number of usage months. If the total hits for all orders in the usage months is equal to or greater than the minimum number of hits, the five highest sales quantities are used to calculate an average. Before averaging, the highest sales amount is removed. If this average is higher than the calculated order point, the order point is adjusted to the 5-Hi value if ASQ, Minimum Threshold, or LUA are not higher.</p> <p><b>Note:</b> In the last sales column an asterisk will appear following the quantity if the highest quantity has been excluded from the calculation.</p>
Dte	The 5-Hi sales dates (for the five highest sales quantities) are listed in each of the sales columns (sales 1 through 5).
Ord	The 5-Hi company order number and generation number are listed in each of the sales columns (sales 1 through 5).
<b>Other Adjuster Calculations</b>	
ASQ Order Point	The calculated ASQ order point.
Low Usage OP	The calculated Low Usage Adjuster order point.
Threshold Order Point	The calculated Threshold order point.
<b>Values at Time of Exception</b>	
Calc OP	The calculated order point, at time of exception, without the 5-Hi order point adjuster applied.
Calc LP	The calculated line point, at time of exception, without the 5-Hi order point adjuster applied.
# Mths Usage	The number of months used, at time of exception, to determine the total item usage.
Usage Method	The method used to determine, at time of exception, the total item usage (for example, <b>Backward</b> method).
Usage Rate	The total item usage, at time of exception.

Field/Function Key	Description
Safety Qty	The safety quantity value, at time of exception.
<b>Parameter Settings and Record Levels</b>	
Min Hits Reqd	The minimum number of hits used for the 5-Hi calculation.
Lvl	<p>The level where the <b>Min Hits</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Max Currency Diff	The maximum value difference used for the 5-Hi calculation.

Field/Function Key	Description
Lvl	<p>The level where the <b>Max Currency Diff</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Incl XFERs	<p>Indicates with <b>Y</b> (Yes) or <b>N</b> (No) if warehouse transfers were used for the 5- Hi calculation.</p>
Lvl	<p>The level where the value of <b>Incl XFERs</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
<b>Function Keys</b>	

Field/Function Key	Description
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Forecast Accuracy Screen

<u>EXCEPTION CENTER - FCA EXCEPTION</u>			
Forecast Accuracy			
Item Number: A200		Warehouse: 1	
This products forecasted usage is 120, but has a projected usage of 800, based on actual usage of 200 for 7 days.			
<u>Values/Calculations</u>			
Forecasted Usage:	120	Calculated Wait Days:	7
Actual Usage:	200	Calculated Qty Change %:	85.00
Projected Usage:	800	Calculated Qty Change:	680
Calculated Cost:	31.00000	Calculated Hits:	125
<u>Parameter Settings and Record Levels</u>			
Qty Change %:	10.00	Hits Greater Than:	100
Qty Change:	20	Unit Cost Greater Than:	30.00000
Wait Days:	7		
F5=Mark as Reviewed                      F9=Item Usage    F12=Return    F24=Delete			

This screen appears after you select a Forecast Accuracy exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Forecast Accuracy exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Forecast Accuracy Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.
<b>Values/Calculations</b>	
Forecasted Usage	The calculated average monthly usage (AMU).
Actual Usage	The total actual usage of sales and demand so far at time of exception.

Field/Function Key	Description
Projected Usage	The calculated projected usage based on actual usage for the month. <b>Calculation:</b> Projected Usage = Actual Usage + [(Actual Usage / elapsed weeks in the month) * weeks remaining in the month].
Calculated Wait Days	The actual number of days that have elapsed in the month which will be used in calculation of Projected Usage.
Calculated Qty Change %	The difference between Forecasted Usage (AMU) and Projected Usage in the form of a percentage.
Calculated Qty Change.	The difference between Forecasted Usage (AMU) and Projected Usage in the form of a quantity
Calculated Hits	The actual number of hits at time of exception.
Calculated Cost	The calculated unit cost greater than value that must be met when an item's usage is being evaluated during the month to see if you are still on track to meet that item's AMU. This evaluation will only be performed for items whose cost (replenish or replacement cost of item) is greater than or equal to the cost indicated in this field. The replacement cost of the item at time of exception.

#### Parameter Settings and Record Levels

Qty Change %	The quantity change <i>percent</i> that must be exceeded when an item's usage is being evaluated during the month to see if you are still on track to meet that item's AMU. For example, assume you have used 10 so far this month of the item and during this evaluation, the system calculates a value of only 12 more to be used of the item. In this example, the system will add the 10 used so far and the 12 expected to be used to arrive at a total of 22 for the month. This value (e.g., 22) is then compared to the AMU (which assume we originally said was 30) that was last calculated. If the quantity difference between the two (in this example 30-22=8) exceeds the minimum quantity number (in the <b>Quantity Change</b> field) and this quantity difference is greater than the percentage indicated in this field, then the <i>Forecast Accuracy</i> (FCA) exception is generated (if all other qualifications are met).
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Field/Function Key	Description
Qty Change	The quantity change value that must be exceeded when an item's usage is being evaluated during the month to see if you are still on track to meet that item's AMU. For example, assume you have used 10 so far this month of the item and during this evaluation, the system calculates a value of only 12 more to be used of the item. In this example, the system will add the 10 used so far and the 12 expected to be used to arrive at a total of 22 for the month. This value (e.g., 22) is then compared to the AMU (which assume we originally said was 30) that was last calculated. If the quantity difference between the two (in this example $30-22=8$ ) exceeds the minimum quantity number identified in this field and this quantity difference is greater than the percentage you specify in the <b>Quantity Change Percent</b> field, then the Forecast Accuracy (FCA) exception is generated (if all other qualifications are met).
Wait Days	The wait days value that must be met when an item's usage is being evaluated during the month to see if you are still on track to meet that item's AMU. For example, you may want to perform an evaluation 13 days after your last AIM month-end to see how your usage so far matches up to that previously calculated AMU (so, 13 would be identified in this field). 13 would ensure that during the next day-end run that occurs on or after that 13th day since your last AIM month-end, the system will review the month- to-date usage of your AIM planned item(s) and based on that usage, calculate what it thinks you might use for the rest of the month to see if that previously calculated AMU needs to be reviewed.
Hits Greater Than	The hits greater than value that must be exceeded when an item's usage is being evaluated during the month to see if you are still on track to meet that item's AMU. When evaluating your item's usage, more than this many hits of the item must be met in order to perform the evaluation.
Unit Cost Greater Than	The unit cost greater than value that must be exceeded when an item's usage is being evaluated during the month to see if you are still on track to meet that item's AMU. This evaluation will only be performed for items whose cost (replacement cost of item) is greater than the cost indicated in this field.
<b>Function Keys</b>	

Field/Function Key	Description
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the message may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

# Exception Center - Inventory Value Change - ASQ Screen

EXCEPTION CENTER - IYA EXCEPTION			
Inventory Value Change - ASQ			
Item Number: A200			Warehouse: 1
The Average Sales Quantity Order Point Adjuster value of 50.000 was used for order point, as it was the highest value for order point from calculated order point and any other order point adjusters calculated.			
<u>ASQ Values/Calculations</u>			
Calc Order Point:	50.000	Calc Currency Diff:	100.00
Calc Line Point:	60.000	Calculated Usage:	30.000
Line Hits:	100		
<u>Other Adjuster Calculations</u>			
5-Hi Order Point:	4.000	Threshold Order Point:	3.000
Low Usage OP:	5.000		
<u>Values at Time of Exception</u>			
Calc OP:	20.000	# Mths Usage: 6	Usage Rate: 40
Calc LP:	30.000	Usage Method: B	Safety Qty: 10
<u>Parameter Settings and Record Levels</u>			
Min Hits Req'd:	2	Lvl: Company	Incl XFERs: N Lvl: Company
Max Currency Diff:	200.00	Lvl: Company	
F5=Mark as Reviewed                      F9=Item Usage    F12=Return    F24=Delete			

This screen appears after you select an Inventory Value Change - ASQ exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for an Inventory Value Change - ASQ exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Inventory Value Change - ASQ Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG / F7=ABBR MSG</b> for further details
<b>ASQ Values/Calculations</b>	
Calc Order Point	The value of the ASQ calculated order point/min.
Calc Line Point	The value of the ASQ calculated line point/max.

Field/Function Key	Description
Line Hits	The total line hits for the item during the calculation method time period used for the ASQ calculation, indicating the number of times the product appeared on a sales order, warehouse transfer, or lost business transaction, regardless of quantity.
Calc Currency Diff	The difference between the ASQ calculated order point value and values at the time of the exception calculated order point value.
Calculated Usage	The total usage for the item during the ASQ calculation method time period used for the ASQ calculation.
<b>Other Adjuster Calculations</b>	
5-Hi Order Point	The calculated 5-HI order point.
Low Usage OP	The calculated Low Usage Adjuster order point.
Threshold Order Point	The calculated Threshold order point.
Calc OP	The calculated order point, at time of exception, without the ASQ order point adjuster applied.
Calc LP	The calculated line point, at time of exception, without the ASQ order point adjuster applied.
# Mths Usage	The number of months used, at time of exception, to determine the total item usage.
Usage Method	The method used to determine, at time of exception, the total item usage (for example, <b>Backward</b> method).
Usage Rate	The total item usage, at time of exception.
Safety Qty	The safety quantity value, at time of exception.
<b>Parameter Settings and Record Levels</b>	
Min Hits Req'd	The minimum number of hits used for the ASQ calculation.

Field/Function Key	Description
Lvl	<p>The level where the <b>Min Hits</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Max Currency Diff	The maximum value difference used for the ASQ calculation.
Lvl	<p>The level where the <b>Max Currency Diff</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <p>1 = Subclass  2 = Class  3 = PLine  4 = Vendor  5 = Warehouse  6 = Company  7 = System  S = Sys Dft  I = Item/WH  C = Company  P = PLine  V = Vendor  W = Warehouse</p>
Incl XFERs	Indicates with <b>Y</b> (Yes) or <b>N</b> (No) if warehouse transfers were used for the ASQ calculation.

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Field/Function Key	Description
Lvl	<p>The level where the value of <b>Incl XFERS</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>1 = Subclass</li><li>2 = Class</li><li>3 = PLine</li><li>4 = Vendor</li><li>5 = Warehouse</li><li>6 = Company</li><li>7 = System</li><li>S = Sys Dft</li><li>I = Item/WH</li><li>C = Company</li><li>P = PLine</li><li>V = Vendor</li><li>W = Warehouse</li></ul>

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### Function Keys

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Field/Function Key	Description
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Inventory Value Change - 5-Hi Screen

EXCEPTION CENTER - IYF EXCEPTION				
Inventory Value Change - 5-Hi				
Item Number:	A200	Warehouse:	1	
The 5-Hi Order Point Adjuster value of 50.000 was used for order point, as it was the highest value for order point from calculated order point and any				
<u>5-Hi Values/Calculations</u>				
Calc Order Point:	50.000	Calc Currency Diff:	100.00	
Calc Line Point:	60.000	Calc Quantity:	30.000	
Qty:	10.000	15.000	20.000	25.000 500.000 *
Dte:	11/21/17	11/21/17	11/21/17	11/21/17 11/21/17
Ord:	01/11110/00	01/11115/01	01/11120/03	01/11130/00 01/11300/00
* Highest quantity excluded from calculation				
<u>Other Adjuster Calculations</u>				
ASQ Order Point:	5.000	Threshold Order Point:	4.000	
Low Usage OP:	3.000			
<u>Values at Time of Exception</u>				
Calc OP:	20.000	# Mths Usage:	6	Usage Rate: 30,000
Calc LP:	30.000	Usage Method:	B	Safety Qty: 10
<u>Parameter Settings and Record Levels</u>				
Min Hits Req'd:	2	Lvl: Company	Incl XFERs:	N Lvl: Company
Max Currency Diff:	200.00	Lvl: Company		
F5=Mark as Reviewed F7=Full Msg F9=Item Usage F12=Return F24=Delete				

This screen appears after you select an Inventory Value Change - 5-Hi exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for an Inventory Value Change - 5-Hi exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Inventory Value Change - 5-Hi Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.
<b>5-Hi Values/Calculations</b>	
Calc Order Point	The value of the 5-Hi calculated order point/min.
Calc Line Point	The value of the 5-Hi calculated line point/max.

Field/Function Key	Description
Calc Currency Diff	The difference between the 5-Hi calculated order point value and values at the time of the exception order point value.
Calc Quantity	The calculated 5-Hi order point quantity.
Qty	<p>The 5-Hi quantity used in each of the sales columns (sales 1 through 5) are listed. The 5-Hi calculation reviews the five highest sales for the number of usage months. If the total hits for all orders in the usage months is equal to or greater than the minimum number of hits, the five highest sales quantities are used to calculate an average. Before averaging, the highest sales amount is removed. If this average is higher than the calculated order point, the order point is adjusted to the 5-Hi value as long as ASQ, Minimum Threshold, or LUA are not higher.</p> <p><b>Note:</b> In the last sales column an asterisk will appear following the quantity if the highest quantity has been excluded from the calculation.</p>
Dte	The 5-Hi sales dates (for the five highest sales quantities) are listed in each of the sales columns (sales 1 through 5).
Ord	The 5-Hi company order number and generation number are listed in each of the sales columns (sales 1 through 5).
<b>Other Adjuster Calculations</b>	
ASQ Order Point	The calculated ASQ order point.
Low Usage OP	The calculated Low Usage Adjuster order point.
Threshold Order Point	Threshold Order Point
<b>Values at Time of Exception</b>	
Calc OP	The calculated order point, at time of exception, without the 5-Hi order point adjuster applied.
Calc LP	The calculated line point, at time of exception, without the 5-Hi order point adjuster applied.
# Mths Usage	The number of months used, at time of exception, to determine the total item usage.
Usage Method	The method used to determine, at time of exception, the total item usage (for example, <b>Backward</b> method).
Usage Rate	The total item usage, at time of exception.
Safety Qty	The safety quantity value, at time of exception.
<b>Parameter Settings and Record Levels</b>	

Field/Function Key	Description
Min Hits Req'd	The minimum number of hits used for the 5-Hi calculation.
Lvl	<p>The level where the <b>Min Hits</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Max Currency Diff	The maximum value difference used for the 5-Hi calculation.
Lvl	<p>The level where the <b>Max Currency Diff</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> </ul> <p>W = Warehouse</p>
Incl XFERs	Indicates with <b>Y</b> (Yes) or <b>N</b> (No) if warehouse transfers were used for the 5- Hi calculation.

Field/Function Key	Description
Lvl	<p>The level where the value of Incl XFERs was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
<b>Function Keys</b>	
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the message may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>

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Field/Function Key	Description
F9=Item Usage	Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management & Planning User Guide for details about this screen.
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a> .
F24=Delete	Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> .

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## Exception Center - Inventory Value Change - Low Usage Adjuster Screen

EXCEPTION CENTER - IYL EXCEPTION			
Inventory Value Change - Low Usage Adjuster		Warehouse: 1	
Item Number: A200			
The Low Usage Order Point Adjuster value of 1.000 was used because Calculated Order Point was .000 and it was the highest value for Order Point from any			
<u>Low Usage Values/Calculations</u>			
Calculated Order Point:	.000	New Line Point:	1.000
New Order Point:	1.000		
<u>Other Adjuster Calculations</u>			
Threshold Order Point:	.000	ASQ Order Point:	.000
5-Hi Order Point:	.000		
<u>Values at Time of Exception</u>			
Usage Rate:	2	Number of Mths Usage:	6
Usage Method: B		Safety Quantity:	10
<u>Parameter Settings and Record Levels</u>			
Lvl: Company		Order Point:	1
Hits:	1	Expiration Date:	12/31/17
Cost:	30.00	Number of Mths Usage:	6
F5=Mark as Reviewed   F7=Full Msg   F9=Item Usage   F12=Return   F24=Delete			

This screen appears after you select an Inventory Value Change - LUA exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for an Inventory Value Change - LUA exception.

All fields on this screen are for viewing purposes only.

### Exception Center - IVC - Low Usage Adjuster Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.
<b>Low Usage Values/Calculations</b>	
Calculated Order Point	The value of the calculated order point/min.

Field/Function Key	Description
New Order Point	The value of the LUA set order point/min.
New Line Point	The value of the LUA calculated line point/max.
<b>Other Adjuster Calculations</b>	
Threshold Order Point	The calculated Threshold order point.
5-Hi Order Point	The calculated 5-Hi order point.
ASQ Order Point	The calculated ASQ order point.
<b>Values at Time of Exception</b>	
Usage Rate	The total item usage, at time of exception.
Usage Method	The method used to determine, at time of exception, the total item usage (for example, <b>Backward</b> method).
Number of Mths Usage	The number of months used, at time of exception, to determine the total item usage.
Safety Quantity	The safety quantity value, at time of exception.
<b>Parameter Settings and Record Levels</b>	
Lvl	<p>The level where the minimum hits was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Hits	The hits greater than option used for the LUM calculation.
Cost	The cost less than option used for the LUM calculation of the item.
Order Point	The new order point option used for the LUM calculation.

Field/Function Key	Description
Expiration Date	The date by which the LUA minimum order point will expire.
Number of Mths Usage	The number of months used option used for the LUM calculation, at time of exception, to determine the total item usage and total item hits.
<b>Function keys</b>	
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Inventory Value Change - Threshold Screen

EXCEPTION CENTER - IYT EXCEPTION			
Inventory Value Change - Threshold			
Item Number:	A200	Warehouse:	1
There has been a change in inventory for this item and the displayed warehouse. The adjuster calculated order point of 1,000.000 is different than the calculated order point of 20.000 due to the Threshold modifier. The			
<u>Threshold Values/Calculations</u>			
New Order Point:	1,000.000	Calc Currency Diff:	100.00
New Line Point:	1,010.000		
<u>Other Adjuster Calculations</u>			
ASQ Order Point:	2.000	5-Hi Order Point:	3.000
Low Usage OP:	1.000		
<u>Values at Time of Exception</u>			
Calc Order Point:	20.000	# of Mths Usage:	6
Calc Line Point:	30.000	Usage Method:	B
Usage Rate:	40	Safety Quantity:	10
<u>Parameter Settings and Record Levels</u>			
Min Threshold OP:	1,000.000	Min Threshold Exp:	12/31/17
Threshold Reference:	Startup		
F5=Mark as Reviewed   F7=Full Msg   F9=Item Usage   F12=Return   F24=Delete			

This screen appears after you select an Inventory Value Change - Threshold exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for an Inventory Value Change - Threshold exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Inventory Value Change - Threshold Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.
<b>Threshold Values/Calculations</b>	
New Order Point	The value of the Threshold set order point/min.

Field/Function Key	Description
New Line Point	The value of the Threshold calculated line point/max.
Calc Currency Diff	The difference between the Threshold set order point value and values at the time of the exception calculated order point value.
<b>Other Adjuster Calculations</b>	
ASQ Order Point	The calculated Average Sales Quantity (ASQ) order point.
Low Usage OP	The calculated Low Usage Adjuster order point.
5-Hi Order Point	The calculated 5-Hi order point.
<b>Values at Time of Exception</b>	
Calc Order Point	The calculated order point, at time of exception, without the Threshold order point adjuster applied.
Calc Line Point	The calculated line point, at time of exception, without the Threshold order point adjuster applied.
Usage Rate	The total item usage, at time of exception.
# of Mths Usage	The number of months used, at time of exception, to determine the total item usage.
Usage Method	The method used to determine, at time of exception, the total item usage (for example, <b>Backward</b> method).
Safety Quantity	The safety quantity value, at time of exception.
<b>Parameter Settings and Record Levels</b>	
Min Threshold OP	The minimum Threshold order point allowed for the item. If the order point calculated is less than this minimum, the order point will be adjusted up to this minimum as long as the ASQ, 5-Hi, or LUA adjusters were not greater.
Threshold Reference	The type of adjustment made to the warehouse item's order point (i.e., the description indicating why this product was set up with a Threshold minimum order point).
Min Threshold Exp	The date by which the threshold minimum order point will expire. If the date has expired, the threshold minimum order point will not be considered as an adjuster when order points are updated.
<b>Function Keys</b>	

Field/Function Key	Description
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the R (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Low Usage Corrected Screen

EXCEPTION CENTER - LUS EXCEPTION			
Low Usage Corrected		Warehouse: 1	
Item Number: A200			
This product's monthly usage of 50.000 is lower than the combined average usage of 110.000 for the prior 6 months. A new monthly usage of 11.000 has been calculated based on the Low Usage Rate Multiplier of 10.00.			
<u>Calculated Values</u>			
New Order Point:	50.000	New Line Point:	200.000
New Usage:	11.000		
Total Prior Usage:	660.000	Average Usage:	110.000
<u>Values at Time of Exception</u>			
Calculated OP:	50.000	Calculated LP:	300.000
Monthly Usage:	50.000		
<u>Parameter Settings and Record Levels</u>			
Ovr %:	10.00	Lvl: Class	Mths of Prior Usg: 6 Lvl: PLine
Min Qty:	20	Lvl: Subclass	Override Reason: HI Lvl: Subclass
Override Description: OVERRIDE			
F5=Mark as Reviewed		F9=Item Usage F12=Return F24=Delete	

This screen appears after you select a Low Usage Corrected exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Low Usage Corrected exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Low Usage Corrected Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG / F7=ABBR MSG</b> for further details.
<b>Calculated Values</b>	
New Order Point	The Order Point that was calculated using the New Usage.
New Line Point	The Line Point that was calculated using the New Usage.

Field/Function Key	Description
New Usage	The new monthly usage.
Total Prior Usage	The Total Usage in prior periods.
Average Usage	The average usage rate determined at time of exception, based on the number of months used to calculate usage. <b>Calculation:</b> Total prior usage divided by the months of prior usage
<b>Values at Time of Exception</b>	
Calculated OP	The calculated order point, at time of exception, without the Low Usage adjuster applied.
Calculated LP	The calculated line point, at time of exception, without the Low Usage adjuster applied.
Monthly Usage	The exceptional monthly usage before adjustment.
<b>Parameter Settings and Record Levels</b>	
Ovr %	The percentage amount that is used based on the usage that is considered low. If it is determined that an item's usage (being processed via month-end) falls below the average usage, this percent is used.
Lvl	The level where the value of the <b>Ovr %</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign. <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

Field/Function Key	Description
Min Qty	The minimum quantity of usage looked at when the system is reviewing previous usage data to see if that data was outside of this minimum quantity value in order for a comparison to occur and an exception to be generated. That is, for an AIM planned item being processed via month-end, if the usage being processed via this month-end falls below the average usage, then an exception can be generated, if designated to do so (in AIM Replenishment Options Maintenance (MENU AIFILE)).
Lvl	The level where the value of the Min Qty was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign. <ul data-bbox="626 722 867 1262" style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Mths of Prior Usg	The number of months previous usage of the item, allowing for reliable for replenishment recommendations.

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Mths of Prior Usq</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Override Reason	<p>The reason the usage override (and possible correction) occurred.</p>
Lvl	<p>The level where the value of the <b>Override Reason</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Override Description	<p>The description for the <b>Override Reason</b>, as determined through AIM Usage Override Reason Codes Maintenance (MENU AIFILE).</p>

Field/Function Key	Description
<b>Function Keys</b>	
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Non-Stock Item with Hits Screen

```

                EXCEPTION CENTER - PWN EXCEPTION
                Non-Stock Item with Hits
Item Number: A200                               Warehouse: 1

There have been 145 hits recorded against this product in the last 3 months.

Values at Time of Exception
-----
Order Point:      25.000   Maintenance Code: A   Status: Non-Stock
Line Point:      175.000  Maintenance Code: 0   Hits:           145
Parameter Settings and Record Levels
-----
Months to Use:    3   Level: Company
Minimum Hits:    25  Level: Company

F5=Mark as Reviewed      F9=Item Usage   F12=Return   F24=Delete

```

This screen appears after you select a Non-Stock Item with Hits exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

For the purposes of the *Non-Stock Product with Hits* (PWN) exception, an item is considered not stocked if the **Update Inventory** flag is set to **N** in IAFILE Item Master Maintenance, or if the **Plan** flag is set to **N** in IAFILE Item Balance Maintenance. By treating all items not planned as if they are non-stock, all non-planned items (except those tracked in the discontinued AIEPWD file based on the discontinued flag) can be tracked for hits.

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Non-Stock Item with Hits exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Non-Stock Item with Hits Screen Fields and Function Keys

Description	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.

Description	Description
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.
<b>Values at Time of Exception</b>	
Order Point	The order point for the item, at time of exception. For items not being planned (i.e., the <b>Plan</b> field is set to <b>N</b> in Item Balance Maintenance), this field will be zero.
Maintenance Code	The maintenance code for the corresponding order point. <b>A</b> (Automatic) displays if the variable is maintained automatically. <b>O</b> (Override) displays if the variable has been permanently overridden by the value shown. <b>1-9</b> (number of months) displays if the variable has been temporarily overridden for the number of months specified. For items not being planned (i.e., the <b>Plan</b> field is set to <b>N</b> in Item Balance Maintenance), this field will be blank.
Status	The status of the item, at time of exception. Non-Stock indicates the item was defined as either <b>Update Inventory = N</b> in Item Master Maintenance (MENU IAFILE) or <b>Plan = N</b> in Item Balance Maintenance (MENU IAFILE).
Line Point	The line point for the item, at time of exception. For items not being planned (i.e., the <b>Plan</b> field is set to <b>N</b> in Item Balance Maintenance), this field will be zero.
Maintenance Code	The maintenance code for the corresponding line point. <b>A</b> (Automatic) displays if the variable is maintained automatically. <b>O</b> (Override) displays if the variable has been permanently overridden by the value shown. <b>1-9</b> (number of months) displays if the variable has been temporarily overridden for the number of months specified. For items not being planned (i.e., the <b>Plan</b> field is set to <b>N</b> in Item Balance Maintenance), this field will be blank.
Hits	The total number of line hits for the item during the <b>Months to Use</b> time frame, at time of exception. Line hits are the number of times this item appears on a sales order, warehouse transfer, or lost business transaction, regardless of quantity or the unit of measure.
<b>Parameter Settings and Record Levels</b>	
Months to Use	Reflects how many months of hit data will be used with the Non-Stocked Item with Hits exception.

Description	Description
Level	<p>The level where the value of the <b>Months to Use</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Minimum Hits	<p>The minimum number of hits that must be met or exceeded in the number of months' time frame for the exception.</p>
Level	<p>The level where the value of the <b>Minimum Hits</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> </ul> <p>W = Warehouse</p>
<b>Function Keys</b>	

Description	Description
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Overridden Item About to Reset Screen

```

EXCEPTION CENTER - OPR EXCEPTION
Overridden Item About to Reset
Item Number: A200                               Warehouse: 1

This item's Order Point will reset after 3 cycles and Line Point will reset
after 3 cycles.

Values at Time of Exception
-----
Order Point:      25.000   Order Point Maintenance Code: 3
Line Point:      175.000  Line Point Maintenance Code:  3
Usage Rate:             15
Parameter Settings and Record Levels
-----
Reset Maintenance Code: 3 Level: Warehouse

F5=Mark as Reviewed           F9=Item_Usage   F12=Return   F24=Delete

```

This screen appears after you select an Overridden Item about to Reset exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for an Overridden Item about to Reset exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Overridden Item About to Reset Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.
<b>Values at Time of Exception</b>	
Order Point	The order point for the item.

Field/Function Key	Description
Order Point Maintenance Code	<p>The maintenance code for the corresponding order point.</p> <p><b>1-9</b> (number of months) displays if the variable has been temporarily overridden for the number of months shown here.</p> <p><b>Note:</b> If the maintenance code for the order point was <b>A</b> for Automatic or <b>O</b> for Override, this entire line will not display on this window (that is, the Order Point and Order Point Maintenance Code will not appear).</p>
Line Point	The line point for the item.
Line Point Maintenance Code	<p>The maintenance code for the corresponding line point.</p> <p><b>1-9</b> (number of months) displays if the variable has been temporarily overridden for the number of months shown here.</p> <p><b>Note:</b> If the maintenance code for the line point was <b>A</b> for Automatic or <b>O</b> for Override, this entire line will not display on this window (that is, the Line Point and Line Point Maintenance Code will not appear).</p>
Usage Rate	The total item usage, at time of exception.
<b>Parameter Settings and Record Levels</b>	
Reset Maintenance Code	<p>Through AIM Replenishment Options (MENU AIFILE), you can identify if you want an Order Point/Line Point Override Ready to Expire Exception (issue) to occur. This type of exception notifies you when items reach a certain maintenance code defined through AIM Replenishment Options (MENU AIFILE). During AIM month-end an exception will be created for each item with the maintenance code less than or equal to the previously specified for either its order point or line point.</p> <p>If either an item's order point (OP) or line point (LP) has been manually overridden with a maintenance code of <b>1-9</b> (number of months) on the AIM Information Screen in Item Balance Maintenance (MENU IAFILE), each AIM month-end process decrements that code until eventually it hits <b>0</b>, and at that time, it reverts back to <b>A</b> (Automatic).</p> <p>If you are being notified via an exception when a certain maintenance code (or number of months remaining) and are close to being expired, this field will identify the number of months remaining.</p>

Field/Function Key	Description
Level	<p>The level where the maximum value difference was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

### Function keys

<p>F5=Mark as Reviewed F5=Mark for Review</p>	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
<p>F7=Full Msg / F7=Abbr Msg</p>	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the message may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>

Field/Function Key	Description
F9=Item Usage	Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management & Planning User Guide for details about this screen.
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a> .
F24=Delete	Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> .

## Exception Center - Purchase Order Lead Time Review Screen

```

                EXCEPTION CENTER - PLT EXCEPTION
                Purchase Order Lead Time Review
Item Number: A200                               Warehouse: 1
PO Receipt for Purchase Order 02/872548 caused the PO Lead Time Exception.

Values at Time of Exception
-----
Lead Time: 10 M/C: 8 Safety Quantity: 10
Warehouse Rank: A Net Qty Available: 201.000
Item Status: AYAIL Company: 02
Transaction Date: 8/17/15 Purchase Order: 872548
Transaction Time: 13:15:40 Line Sequence: 2
Values at Time of PO Receipt
-----
PO Receipt Lead Time: 2 Lead Time Average: 2
Parameter Settings and Record Levels
-----
Minimum Lead Time %: 10.00 Lvl: PLine
Maximum Lead Time %: 30.00 Lvl: PLine

F2=PO Rcpt Rvw      F9=Item Usage  F12=Return  F24=Delete
F5=Mark as Reviewed

```

This screen appears after you select a Purchase Order Lead Time Review exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Purchase Order Lead Time Review exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Purchase Order Lead Time Review Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG / F7=ABBR MSG</b> for further details.

### Values at Time of Exception

Field/Function Key	Description
Lead Time	The current lead time in Item Balance Maintenance (MENU IAFILE) at time of receipt.
M/C	The current lead time maintenance code in Item Balance Maintenance (MENU IAFILE) at time of receipt.
Safety Quantity	The additional stock stored in inventory to compensate for variations in customer demand and vendor lead times.
Warehouse Rank	<p>The warehouse rank (letter) assigned to the item.</p> <p><b>Note:</b> Items can be ranked in a warehouse, allowing you to further define variables for an item. This provides you with a way to flag your top selling items by ranks. You will be able to define a <b>Number of Ranks to be Used</b> through Replenishment Options Maintenance (MENU AIFILE). This defined number of ranks then determines the values that can be used to rank an item. For example, if the <b>Number of Ranks to be Used</b> field is 4, then you will be allowed to key the first 4 letters in the alphabet to rank your items (or A, B, C, or D).</p>
Net Qty Available	<p>The net quantity available of this item, calculated as:</p> <p><b>Calculation: Quantity On-hand - Allocated + In Process - Customer Reservations</b></p>
Item Status	<p>The status of the item:</p> <ul style="list-style-type: none"> <li>• <b>Stock</b> appears if <b>Update Inventory</b> is <b>Y</b> in Item Master Maintenance (MENU IAFILE) and Special-Order Code is blank in Item Balance Maintenance (MENU IAFILE)</li> <li>• <b>Drop Ship</b> appears if <b>Special Order Code</b> is <b>D</b> in Item Balance Maintenance (MENU IAFILE)</li> <li>• <b>Special Order</b> appears if <b>Special Order Code</b> is <b>S</b> in Item Balance Maintenance (MENU IAFILE)</li> <li>• <b>Non-Stock</b> appears if <b>Update Inventory</b> is <b>N</b> in Item Master Maintenance (MENU IAFILE)</li> <li>• <b>WH Transfer</b> appears if vendor on the receipt was a Warehouse Transfer vendor</li> <li>• <b>Undetermined</b> appears if Undetermined</li> </ul>
Company	The company number associated with the PO Number for which a PO Lead Time exception occurred.
Transaction Date	The date that the receipt posted.
Purchase Order	The purchase order number for the item for which a PO Lead Time exception occurred.
Transaction Time	The time that the receipt posted.

Field/Function Key	Description
Line Sequence	The line sequence number for the item in this purchase order.
<b>Values of Time of PO Receipt</b>	
PO Receipt Lead Time	The lead time calculated for this receipt.
Lead Time Average	The calculated average lead time in Item Balance Maintenance (MENU IAFILE) at the time of this receipt.
<b>Parameter Settings and Record Levels</b>	
Minimum Lead Time %	<p>The minimum change percent for the item's lead time.</p> <p>If the calculated lead time for a new receipt changes by less than this <b>Less Than Percent</b> value, the system will change the <b>Ignore Lead Time</b> value to <b>Y</b> in the Purchase Order Receipt History record (<b>RCPT</b>) and will generate an exception (if designated to do so), which will be stored in the AIM Exception Purchase Order Lead Time Review Exception File (<b>AIEPLT</b>).</p>
Lvl	<p>The level where the value of the <b>Minimum Lead Time %</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Maximum Lead Time %	<p>The maximum change percent for the item's lead time.</p> <p>If the calculated lead time for a new receipt changes by more than this <b>Greater Than Percent</b> value, the system will change the <b>Ignore Lead Time</b> value to <b>Y</b> in the Purchase Order Receipt History record (<b>RCPT</b>) and will generate an exception (if designated to do so), which will be stored in the AIM Exception Purchase Order Lead Time Review Exception File (<b>AIEPLT</b>).</p>

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Maximum Lead Time %</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
<b>Function keys</b>	
F2=PO Rcpt Rvw	<p>Press <b>F2=PO RCPT RVW</b> to review past receipts and change the <b>Calculate Lead Time</b> (Clc Ldt) and/or <b>Ignore Lead Time</b> (Ign Ldt) flags, if needed. The <a href="#">Exception Center - PO Receipt Review Screen</a> will appear.</p>
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>

Field/Function Key	Description
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - PO Receipt Review Screen

PO RECEIPT REVIEW										
Item: A200			Sharp Copier Toner xx							
Dft UM: EA			SF-7200							
WH: 1			Hartford, CT				Co: 02			
Vendor: 100			SHARP INTERNATIONAL VENDOR				PO: 872548			
							Ln: 2			
Sl	Rcpt Date	Co	PO#	Line Seq	Clc Ldt	Ign Ldt	Lead Time	Safety Percent	Safety Quantity	Net Available
1	3/16/09	01	101486	10	N		0	.00	0	.000
2	8/26/03	01	100193	10	N		0	.00	0	.000
3	8/26/03	01	100194	10	N		0	.00	0	.000
4	8/26/03	01	100189	10	N		0	.00	0	.000
5	8/26/03	01	100205	10	N		0	.00	0	.000
6	7/25/03	01	100184	10	N		0	.00	0	.000
7	7/11/03	01	BRB001	10	N		0	.00	0	.000
8	2/23/01	01	100123	20	N		0	.00	0	.000
9	2/05/01	01	100117	20	N		0	.00	0	.000
10	12/30/00	01	100027	20			0	.00	0	.000
11	11/23/00	01	S00085	10			0	.00	0	.000
12	9/07/00	01	S00075	40			0	.00	0	.000
										More...
Selection: 00,			F9=Maintenance				F12=Return			
F2=Ord/Rcv										

This screen appears after you press **F2=PO RCPT RVW** on the Exception Center - Purchase Order Lead Time Review Screen or the [Exception Center - Purchase Order Safety Review Screen](#).

Use this screen to review past receipts and change **Calculate Lead Time** (Clc Ldt) and/or **Ignore Lead Time** (Ign Ldt) flags, if needed, via the **F9=MAINTENANCE** function key. Receipts will be shown in descending order and only for the Item, WH and Vendor indicated on this screen (that is, the system looks at the selected item number, warehouse, and vendor and fills this screen with only records that are for that item number, warehouse, and vendor).

In order to select a line for detail in the **Selection** field, you must have authority to **Open PO's by Item** or **PO History by Item**, depending on the current status of the purchase order, or you will receive an error message.

### Exception Center - PO Receipt Review Screen Fields and Function Keys

Field/Function Key	Description
Item	The item number for which you are reviewing past receipts. The item's description (line 1 and 2) is also displayed to the right of the item number. Display
Dft UM	The default unit of measure of the item. Display

Field/Function Key	Description
WH	The warehouse ID for which you are reviewing past receipts. Display
Vendor	The vendor for which you are reviewing past receipts. Display
Co	This field displays only if this screen is accessed from the <a href="#">Exception Center - Purchase Order Lead Time Review Screen</a> . The company of the receipt that caused the Purchase Order Lead Time Review Exception. Display
PO	This field displays only if this screen is accessed from the <a href="#">Exception Center - Purchase Order Lead Time Review Screen</a> . The purchase order number of the receipt that caused the Purchase Order Lead Time Review Exception. Display
Ln	This field displays only if this screen is accessed from the <a href="#">Exception Center - Purchase Order Lead Time Review Screen</a> . The line sequence number for the item on the purchase order of the receipt that caused the Purchase Order Lead Time Review Exception. Display
SI	This is the reference number of the corresponding line. To select one of the lines to display detail information for the item, key this number in the <b>Selection</b> field, and press <b>ENTER</b> . The Purchase Order Item Detail Screen in Distribution A+ Purchasing will appear. Display
Rcpt Date	The receipt date for this past receipt. Display
Co	The purchase order company number of the past receipt. Display
PO#	The purchase order number of the past receipt. Display
Line Seq	The purchase order line sequence number of the past receipts. Display

Field/Function Key	Description
Clc LdT	<p>Indicates with <b>Y</b> (yes) or <b>N</b> (no) if you are calculating lead time for your items. You have the option to change this field, if needed, via the <b>F9=MAINTENANCE</b> function key. Initially, this field is display only. Once you press <b>F9=MAINTENANCE</b>, this field becomes available for entry.</p> <p>Key <b>Y</b> to calculate the lead time.</p> <p>Key <b>N</b> if you do not want to calculate the lead time.</p> <p><b>Valid Values:</b> Y or N</p> <p>(A 1) Optional</p>
Ign LdT	<p>Indicates with <b>Y</b> (yes) or <b>N</b> (no) if the receipts lead time have been excluded from the average lead time calculation for this past receipt. You have the option to change this field, if needed, via the <b>F9=MAINTENANCE</b> function key. Initially, this field is display only. Once you press <b>F9=MAINTENANCE</b>, this field becomes available for entry.</p> <p>Key <b>Y</b> to ignore the lead time.</p> <p>Key <b>N</b> to include the lead time.</p> <p><b>Valid Values:</b> Y or N</p> <p>(A 1) Optional</p>
Lead Time	<p>The lead time calculated for this past receipt.</p> <p>Display</p>
Safety Percent	<p>The display of this field is toggled with the <b>F2=ORD/RCV / F2=SAF/NET</b> toggle function key.</p> <p>The calculation that could lead to the generation of the Purchase Order Safety Review Exception but for this past receipt. This value is as of the time of the receipt.</p> <p><b>Calculation: (Safety Percent = Safety / Net Available Quantity * 100)</b></p> <p>Display</p>
Safety Quantity	<p>The display of this field is toggled with the <b>F2=ORD/RCV / F2=SAF/NET</b> toggle function key.</p> <p>The additional stock stored in inventory to compensate for variations in customer demand and vendor lead times. This value is as of the time of the receipt and is in the default unit of measure for this item.</p> <p>Display</p>

Field/Function Key	Description
Net Available	<p>The display of this field is toggled with the <b>F2=ORD/RCV / F2=SAF/NET</b> toggle function key.</p> <p>The net quantity available of this item. This value is as of the time of the receipt and is in the default unit of measure for this item.</p> <p><b>Calculation: Quantity On-hand - Allocated + In Process - Customer Reservations</b></p> <p>Display</p>
Qty Ordered	<p>The display of this field is toggled with the <b>F2=ORD/RCV / F2=SAF/NET</b> toggle function key.</p> <p>The quantity of the item, in the displayed unit of measure, that was ordered for this past receipt.</p> <p>Display</p>
Qty Received	<p>The display of this field is toggled with the <b>F2=ORD/RCV / F2=SAF/NET</b> toggle function key.</p> <p>The quantity of the item that is received, in the displayed unit of measure for this past receipt.</p> <p>Display</p>
U/M	<p>The display of this field is toggled with the <b>F2=ORD/RCV / F2=SAF/NET</b> toggle function key.</p> <p>The item's buying unit (for example, 24 pack).</p> <p>Display</p>
Selection	<p>Use this field to select a line for which you want to display detail information for the item.</p> <p>Key the reference number corresponding to the line you want to select, and press <b>ENTER</b>. The Purchase Order Item Detail Screen in Distribution A+ Purchasing will appear.</p> <p>(N 2,0) Optional</p>
<b>Function keys</b>	
F2=Ord/Rcv /F2=Saf/Net	<p>Press the <b>F2=ORD/RCV / F2=SAF/NET</b> toggle function key to toggle between showing the <b>Quantity Ordered, Quantity Received</b>, and <b>U/M</b> fields, or the <b>Safety Percent, Safety Quantity</b>, and <b>Net Available</b> fields.</p>
F9=Maintenance	<p>Press <b>F9=MAINTENANCE</b> to maintain the <b>Clc Ldt</b> and/or <b>Ign Ldt</b> flags on this screen. When you press <b>F9=MAINTENANCE</b>, the <b>F10=UPDATE</b> function key appears and the <b>Clc Ldt</b> and <b>Ign Ldt</b> fields become entry fields, allowing you to make changes, if needed. Changes occur once you press <b>F10=UPDATE</b>.</p>

Field/Function Key	Description
F10=Update	Press <b>F10=UPDATE</b> to confirm any changes you made to the <b>Clc Ldt</b> and/or <b>Ign Ldt</b> flags on this screen. Changes will be processed and the screen will be redisplayed in non-maintenance mode.
F11=Auto Fill	Press <b>F11=AUTO FILL</b> to automatically fill in the blank values in the <b>Clc Ldt</b> and <b>Ign Ldt</b> columns. The blank <b>Clc Ldt</b> fields will be filled with <b>Y</b> , and the blank <b>Ign Ldt</b> fields will be filled with <b>N</b> .
F12=Return	If you are in non-maintenance mode, press <b>F12=RETURN</b> to return to the previous screen. If you are in maintenance mode (via <b>F9=MAINTENANCE</b> ), press <b>F12=RETURN</b> to return to the non-maintenance mode. Changes you entered are cleared.

## Exception Center - Purchase Order Safety Review Screen

```

                EXCEPTION CENTER - PSR EXCEPTION
                Purchase Order Safety Review
Item Number: A200                               Warehouse: 1

Looking back over the last 200 PO Receipts for no more than 12 months, at
least 100 of the receipts' safety percentages were less than 10.00 percent.

Values at Time of Exception
-----
Net Available:          123.000                Warehouse Rank: A
Safety Quantity:         10                    Item Status:  AVAIL
Parameter Settings and Record Levels
-----
Wh Rank Used: A                Rcpts for Maj:  100    Lvl: PLine
Rcpts to Rvw:   200    Lvl: PLine    Min Safety %:  10.00  Lvl: Company
Mths to Rvw:   12     Lvl: Subclass  Max Safety %:   55.00  Lvl: Class

F2=PO Rcpt Rvw      F5=Mark as Reviewed      F9=Item Usage      F12=Return      F24=Delete

```

This screen appears after you select a Purchase Order Safety Review exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Purchase Order Safety Review exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Purchase Order Safety Review Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.

### Values at Time of Exception

Field/Function Key	Description
Net Available	<p>The net quantity available of this item, calculated as:</p> <p><b>Calculation: Quantity On-hand - Allocated + In Process - Customer Reservations</b></p>
Warehouse Rank	<p>The warehouse rank (letter) assigned to the item.</p> <p><b>Note:</b> Items can be ranked in a warehouse, allowing you to further define variables for an item. This provides you with a way to flag your top selling items by ranks. You will be able to define a <b>Number Ranks to be Used</b> through Replenishment Options Maintenance (MENU AIFILE). This defined number of ranks then determines the values that can be used to rank an item. For example, if the <b>Number of Ranks to be Used</b> field is 4, then you will be allowed to key the first 4 letters in the alphabet to rank your items (or A, B, C, or D).</p>
Safety Quantity	<p>The additional stock stored in inventory to compensate for variations in customer demand and vendor lead times.</p>
Item Status	<p>The status of the item:</p> <ul style="list-style-type: none"> <li>• <b>Stock</b> appears if <b>Update Inventory</b> is <b>Y</b> in Item Master Maintenance (MENU IAFILE) and Special Order Code is blank in Item Balance Maintenance (MENU IAFILE)</li> <li>• <b>Drop Ship</b> appears if <b>Special Order Code</b> is <b>D</b> in Item Balance Maintenance (MENU IAFILE)</li> <li>• <b>Special Order</b> appears if <b>Special Order Code</b> is <b>S</b> in Item Balance Maintenance (MENU IAFILE)</li> <li>• <b>Non Stock</b> appears if <b>Update Inventory</b> is <b>N</b> in Item Master Maintenance (MENU IAFILE)</li> <li>• <b>WH Transfer</b> appears if vendor on the receipt was a Warehouse Transfer vendor</li> <li>• <b>Undetermined</b> appears if Undetermined</li> </ul>
<b>Parameter Settings and Record Levels</b>	
Wh Rank Used	<p>The warehouse rank assigned to the item at time of replenishment.</p>
Rcpts for Maj	<p>The minimum number of out-of-range receipt records found that are below the minimum or above the maximum creating the majority of receipts in <b>Mths to Rvw</b> time frame the when the exception was generated.</p>

---

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Rcpts for Maj</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Rcpts to Rvw	<p>The maximum number of receipt records (working backward from today and only within the <b>Number of Months Back</b> time frame) that will be looked at when the system is reviewing previous receipt data to see if those previous receipts were also outside of the min/max safety percents (shown in the <b>Minimum Safety Percent</b> and <b>Maximum Safety Percent</b> fields). That is, these Purchase Order Receipt History records (<b>RCPT</b>) will be looked at to find the stored calculated product safety percent from each record, and compare each to the min/max safety percent values to see if they are out of range.</p>

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Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Rcpts to Rvw</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Min Safety %	<p>The lowest/minimum product safety percent that will be considered acceptable ('within range') and would not cause an exception. When the system is reviewing previous receipt data to see if those previous receipts have a product safety percent that was outside of the min/max safety percent parameters, it is this <b>Minimum Safety Percent</b> value that serves as that 'min'. The Purchase Order Receipt History records (<b>RCPT</b>) will be reviewed to locate the stored calculated product safety percent from each record, and then compare that value from each record to this min safety percent value to see if they are out of range.</p>

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Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Min Safety %</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Mths to Rww	<p>The maximum number of months (working backward from the time of the exception) that will be looked at to find Purchase Order Receipt History records (<b>RCPT</b>) (up to the max number of receipts defined in the <b>Receipts to Review</b> field) when the system is reviewing previous receipt data to see if those previous receipts were also outside of the min/max safety percents (shown in the <b>Minimum Safety Percent</b> and <b>Maximum Safety Percent</b> fields). That is, these <b>RCPT</b> records will be looked at to find the stored calculated product safety percent from each record and compare each to the min/max safety percent values to see if they are out of range.</p>

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Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Mths to Rvw</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Max Safety %	<p>The highest/maximum product safety percent that will be considered acceptable ('within range') and would not cause an exception. When the system is reviewing previous receipt data to see if those previous receipts have a product safety percent that was outside of the min/max safety percent parameters, it is this <b>Maximum Safety Percent</b> value that serves as that 'max'. The Purchase Order Receipt History records (<b>RCPT</b>) will be reviewed to locate the stored calculated product safety percent from each record, and then compare that value from each record to this max safety percent value to see if they are out of range.</p>

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Max Safety %</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

### Function Keys

F2=PO Rcpt Rvw	<p>Press <b>F2=PO RCPT RVW</b> to review past receipts and change the <b>Calculate Lead Time</b> (Clc Ldt) and/or <b>Ignore Lead Time</b> (Ign Ldt) flags, if needed. The <a href="#">Exception Center - PO Receipt Review Screen</a> will appear.</p>
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>

Field/Function Key	Description
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the message may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Seasonal Trending - Hits Lower than Last Year Screen

EXCEPTION CENTER - SLH EXCEPTION			
Seasonal Trending - Hits Lower than Last Year			
Item Number: A200			Warehouse: 1
This item had 50 line hits last year which is lower than the 100 hits last year at the Company level.			
<u>Calculated Values</u>			
Usage Rate:	40.000	Last Yr Usg:	100.000
This Yr Usg:	250.000	Calc Trend %:	250.00
Trend % Used:	250.00		
<u>Values at Time of Exception</u>			
Usage Rate:	40	This Year Hits:	200
Lead Time:	7	Last Year Hits:	50
<u>Parameter Settings and Record Levels</u>			
Max % Override:	300.00	Lvl: Company	
Min % Override:	200.00	Lvl: Company	
Last Yr Min Hits:	100	Lvl: Company	
This Yr Min Hits:	150	Lvl: Company	
Adv by Lead Time: Y		Lvl: Company	
Seasonal Line-Up:	2	Lvl: Company	
F5=Mark as Reviewed		F9=Item Usage	F12=Return F24=Delete

This screen appears after you select a Seasonal Trending - Hits Lower than Last Year exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Seasonal Trending - Hits Lower than Last Year exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Seasonal Trending - Hits Lower than Last Year Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.

Field/Function Key	Description
<b>Calculated Values</b>	
Usage Rate	The calculated Usage Rate (AMU - average monthly usage), at time of exception.
Last Yr Usg	The total calculated trend usage of the item within the months to use time frame for last year.
This Yr Usg	The total calculated trend usage of the item within the months to use time frame for this year.
Calc Trend %	The calculated trend percent, calculated as: <b>Calculation: This Year Usage divided by Last Year Usage times 100.</b>
Trend % Used	The trend percent that would have been used in the calculation of the item Usage Rate had the hits requirement been met.
<b>Values at Time of Exception</b>	
Usage Rate	The Usage Rate (AMU - average monthly usage), at time of exception.
Lead Time	The current lead time in Item Balance Maintenance (MENU IAFILE), at time of exception.
This Year Hits	The total number of line hits for the item within the months to use time frame for this year, at time of exception.
Last Year Hits	The total number of line hits for the item within the months to use time frame for last year, at time of exception.
<b>Parameter Settings and Record Levels</b>	
Max % Override	The maximum allowed Trend Percentage. The Calculated Trend Percent cannot exceed this value.

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Max % Override</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Min % Override	<p>The minimum allowed Trend Percentage. The calculated Trend Percent cannot fall below this value.</p>
Lvl	<p>The level where the value of the <b>Min % Override</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

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Field/Function Key	Description
Last Yr Min Hits	<p>The minimum number of line hits last year before a Trend Percent will be calculated.</p> <p>Line hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction (deleted order/line), regardless of quantity.</p>
Lvl	<p>The level where the value of the <b>Last Yr Min Hits</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
This Yr Min Hits	<p>The minimum number of line hits this year before a Trend Percent will be calculated.</p> <p>Line hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction (deleted order/line), regardless of quantity.</p>

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Field/Function Key	Description
Lvl	<p>The level where the value of the <b>This Yr Min Hits</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <p>1 = Subclass            2 = Class            3 = PLine            4 = Vendor            5 = Warehouse            6 = Company            7 = System            S = Sys Dft            I = Item/WH            C = Company            P = PLine            V = Vendor            W = Warehouse</p>
Adv by Lead Time	<p>Indicates by <b>Y</b> or <b>N</b> if the season (starting period) is adjusted by the lead time for the Advanced Inventory Management Balance File (<b>AIBAL</b>) record. The lead time of the item is used to extend the starting period by the lead time.</p>
Lvl	<p>The level where the value of the <b>Adv by Lead Time</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

Field/Function Key	Description
Seasonal Line-Up	<p>The number of months (either a positive or negative value) that the starting period (season) used for calculating the Average Monthly Usage (AMU) will be adjusted. This field does not impact the Trend Percent calculation.</p> <p>A positive value will start the season earlier (increases the starting period).</p> <p>A negative value will start the season later (decreases the starting period).</p> <p>The value in either direction (positive or negative) cannot exceed 3 months.</p>
Lvl	<p>The level where the value of the <b>Seasonal Line-Up</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
<b>Function Keys</b>	
<p>F5=Mark as Reviewed F5=Mark for Review</p>	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>

Field/Function Key	Description
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Seasonal Trending - Hits Lower than This Year Screen

EXCEPTION CENTER - STH EXCEPTION			
Seasonal Trending - Hits Lower than This Year			
Item Number: A200	Warehouse: 1		
This item has 60 line hits this year which is lower than the 200 hits this year at the Company level.			
<u>Calculated Values</u>			
Usage Rate:	40.000	Last Yr Usq:	100.000
This Yr Usq:	250.000	Calc Trend %:	250.00
Trend % Used:	250.00		
<u>Values at Time of Exception</u>			
Usage Rate:	40	This Year Hits:	60
Lead Time:	7	Last Year Hits:	200
<u>Parameter Settings and Record Levels</u>			
Max % Override:	300.00	Lvl: Company	
Min % Override:	200.00	Lvl: Company	
Last Yr Min Hits:	100	Lvl: Company	
This Yr Min Hits:	200	Lvl: Company	
Adv by Lead Time:	Y	Lvl: Company	
Seasonal Line-Up:	2	Lvl: Company	
F5=Mark as Reviewed      F9=Item Usage      F12=Return      F24=Delete			

This screen appears after you select a Seasonal Trending - Hits Lower than This Year exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Seasonal Trending - Hits Lower than This Year exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Seasonal Trending - Hits Lower than This Year Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.

### Calculated Values

Field/Function Key	Description
Usage Rate	The calculated Usage Rate (AMU - average monthly usage), at time of exception.
Last Yr Usq	The total calculated trend usage of the item within the months to use time frame for last year.
This Yr Usq	The total calculated trend usage of the item within the months to use time frame for this year.
Calc Trend %	The calculated trend percent, calculated as: <b>Calculation: This Year Usage divided by Last Year Usage times 100.</b>
Trend % Used	The trend percent that would have been used in the calculation of the item Usage Rate had the hits requirement been met.
<b>Values at Time of Exception</b>	
Usage Rate	The Usage Rate (AMU - average monthly usage), at time of exception.
Lead Time	The current lead time in Item Balance Maintenance (MENU IAFILE), at time of exception.
This Year Hits	The total number of line hits for the item within the months to use time frame for this year, at time of exception.
Last Year Hits	The total number of line hits for the item within the months to use time frame for last year, at time of exception.
<b>Parameter Settings and Record Levels</b>	
Max % Override	The maximum allowed Trend Percentage. The Calculated Trend Percent cannot exceed this value.

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Max % Override</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Min % Override	<p>The minimum allowed Trend Percentage. The calculated Trend Percent cannot fall below this value.</p>
Lvl	<p>The level where the value of the <b>Min % Override</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

Field/Function Key	Description
Last Yr Min Hits	<p>The minimum number of line hits last year before a Trend Percent will be calculated.</p> <p>Line hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction (deleted order/line), regardless of quantity.</p>
Lvl	<p>The level where the value of the <b>Last Yr Min Hits</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
This Yr Min Hits	<p>The minimum number of line hits this year before a Trend Percent will be calculated.</p> <p>Line hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction (deleted order/line), regardless of quantity.</p>

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>This Yr Min Hits</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Adv by Lead Time	<p>Indicates by <b>Y</b> or <b>N</b> if the season (starting period) is adjusted by the lead time for the Advanced Inventory Management Balance File (<b>AIBAL</b>) record. The lead time of the item is used to extend the starting period by the lead time.</p>
Lvl	<p>The level where the value of the <b>Adv by Lead Time</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

Field/Function Key	Description
Seasonal Line-Up	<p>The number of months (either a positive or negative value) that the starting period (season) used for calculating the Average Monthly Usage (AMU) will be adjusted. This field does not impact the Trend Percent calculation.</p> <p>A positive value will start the season earlier (increases the starting period).</p> <p>A negative value will start the season later (decreases the starting period).</p> <p>The value in either direction (positive or negative) cannot exceed 3 months.</p>
Lvl	<p>The level where the value of the <b>Seasonal Line-Up</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
<b>Function keys</b>	
<p>F5=Mark as Reviewed F5=Mark for Review</p>	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>

Field/Function Key	Description
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the message may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Seasonal Trending - Percent Greater than Maximum Screen

<u>EXCEPTION CENTER - SHP EXCEPTION</u>			
Seasonal Trending - Percent Greater than Maximum			
Item Number: A200			Warehouse: 1
This item has a calculated Trending Percent of 500.00 which is higher than the Maximum Percent of 300.00 at the Company level.			
<u>Calculated Values</u>			
Usage Rate:	40.000	Last Yr Usg:	100.000
This Yr Usg:	500.000	Calc Trend %:	500.00
Trend % Used:	300.00		
<u>Values at Time of Exception</u>			
Usage Rate:	40	This Year Hits:	60
Lead Time:	7	Last Year Hits:	50
<u>Parameter Settings and Record Levels</u>			
Max % Override:	300.00	Lvl:	Company
Min % Override:	200.00	Lvl:	Company
Last Yr Min Hits:	20	Lvl:	Company
This Yr Min Hits:	20	Lvl:	Company
Adv by Lead Time: Y		Lvl:	Company
Seasonal Line-Up:	2	Lvl:	Company
F5=Mark as Reviewed                      F9=Item Usage    F12=Return    F24=Delete			

This screen appears after you select a Seasonal Trending - Percent Greater than Maximum exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Seasonal Trending - Percent Greater than Maximum exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Seasonal Trending - Percent Greater than Maximum Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.

Field/Function Key	Description
<b>Calculated values</b>	
Usage Rate	The calculated Usage Rate (AMU - average monthly usage), at time of exception.
Last Yr Usg	The total calculated trend usage of the item within the months to use time frame for last year.
This Yr Usg	The total calculated trend usage of the item within the months to use time frame for this year.
Calc Trend %	The calculated trend percent, calculated as: <b>Calculation: This Year Usage divided by Last Year Usage times 100.</b>
Trend % Used	The actual trend percent ( <b>Maximum Percent Override</b> ) used in the calculation of the item Usage Rate.
<b>Values at Time of Exception</b>	
Usage Rate	The Usage Rate (AMU - average monthly usage), at time of exception.
Lead Time	The current lead time in Item Balance Maintenance (MENU IAFILE), at time of exception.
This Year Hits	The total number of line hits for the item within the months to use time frame for this year, at time of exception.
Last Year Hits	The total number of line hits for the item within the months to use time frame for last year, at time of exception.
<b>Parameters Settings and Record Levels</b>	
Max % Override	The maximum allowed Trend Percentage. The Calculated Trend Percent cannot exceed this value.

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Max % Override</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Min % Override	<p>The minimum allowed Trend Percentage. The calculated Trend Percent cannot fall below this value.</p>
Lvl	<p>The level where the value of the <b>Min % Override</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

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Field/Function Key	Description
Last Yr Min Hits	<p>The minimum number of line hits last year before a Trend Percent will be calculated.</p> <p>Line hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction (deleted order/line), regardless of quantity.</p>
Lvl	<p>The level where the value of the <b>Last Yr Min Hits</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
This Yr Min Hits	<p>The minimum number of line hits this year before a Trend Percent will be calculated.</p> <p>Line hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction (deleted order/line), regardless of quantity.</p>

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Field/Function Key	Description
Lvl	<p>The level where the value of the <b>This Yr Min Hits</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Adv by Lead Time	<p>Indicates by <b>Y</b> or <b>N</b> if the season (starting period) is adjusted by the lead time for the Advanced Inventory Management Balance File (<b>AIBAL</b>) record. The lead time of the item is used to extend the starting period by the lead time.</p>
Lvl	<p>The level where the value of the <b>Adv by Lead Time</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

Field/Function Key	Description
Seasonal Line-Up	<p>The number of months (either a positive or negative value) that the starting period (season) used for calculating the Average Monthly Usage (AMU) will be adjusted. This field does not impact the Trend Percent calculation.</p> <p>A positive value will start the season earlier (increases the starting period).</p> <p>A negative value will start the season later (decreases the starting period).</p> <p>The value in either direction (positive or negative) cannot exceed 3 months.</p>
Lvl	<p>The level where the value of the <b>Seasonal Line-Up Expires</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
<b>Function Keys</b>	

Field/Function Key	Description
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Seasonal Trending - Percent Lower than Minimum Screen

EXCEPTION CENTER - SLP EXCEPTION			
Seasonal Trending - Percent Lower than Minimum			
Item Number: A200	Warehouse: 1		
This item has a calculated Trending Percent of 130.00 which is lower than the Minimum Percent of 200.00 at the Company level.			
<u>Calculated Values</u>			
Usage Rate:	40.000	Last Yr Usg:	100.000
This Yr Usg:	130.000	Calc Trend %:	130.00
Trend % Used:	200.00		
<u>Values at Time of Exception</u>			
Usage Rate:	40	This Year Hits:	60
Lead Time:	7	Last Year Hits:	50
<u>Parameter Settings and Record Levels</u>			
Max % Override:	300.00	Lvl: Company	
Min % Override:	200.00	Lvl: Company	
Last Yr Min Hits:	20	Lvl: Company	
This Yr Min Hits:	20	Lvl: Company	
Adv by Lead Time:	Y	Lvl: Company	
Seasonal Line-Up:	2	Lvl: Company	
F5=Mark as Reviewed      F9=Item Usage      F12=Return      F24=Delete			

This screen appears after you select a Seasonal Trending - Percent Lower than Minimum exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Seasonal Trending - Percent Lower than Minimum exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Seasonal Trending - Percent Lower than Minimum Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG / F7=ABBR MSG</b> for further details.

### Calculated Values

Field/Function Key	Description
Usage Rate	The calculated Usage Rate (AMU - average monthly usage), at time of exception.
Last Yr Usq	The total calculated trend usage of the item within the months to use time frame for last year.
This Yr Usq	The total calculated trend usage of the item within the months to use time frame for this year.
Calc Trend %	The calculated trend percent, calculated as: <b>Calculation: This Year Usage divided by Last Year Usage times 100.</b>
Trend % Used	The actual trend percent ( <b>Minimum Percent Override</b> ) used in the calculation of the item Usage Rate.
<b>Values at Time of Exception</b>	
Usage Rate	The Usage Rate (AMU - average monthly usage), at time of exception.
Lead Time	The current lead time in Item Balance Maintenance (MENU IAFILE), at time of exception.
This Year Hits	The total number of line hits for the item within the months to use time frame for this year, at time of exception.
Last Year Hits	The total number of line hits for the item within the months to use time frame for last year, at time of exception.
<b>Parameter Settings and Record Levels</b>	
Max % Override	The maximum allowed Trend Percentage. The Calculated Trend Percent cannot exceed this value.

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Max % Override</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Min % Override	<p>The minimum allowed Trend Percentage. The calculated Trend Percent cannot fall below this value.</p>
Lvl	<p>The level where the value of the <b>Min % Override</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>

Field/Function Key	Description
Last Yr Min Hits	<p>The minimum number of line hits last year before a Trend Percent will be calculated.</p> <p>Line hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction (deleted order/line), regardless of quantity.</p>
Lvl	<p>The level where the value of the <b>Last Yr Min Hits</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
This Yr Min Hits	<p>The minimum number of line hits this year before a Trend Percent will be calculated.</p> <p>Line hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction (deleted order/line), regardless of quantity.</p>

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>This Yr Min Hits</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Adv by Lead Time	<p>Indicates by <b>Y</b> or <b>N</b> if the season (starting period) is adjusted by the lead time for the Advanced Inventory Management Balance File (<b>AIBAL</b>) record. The lead time of the item is used to extend the starting period by the lead time.</p>
Seasonal Line-Up	<p>The number of months (either a positive or negative value) that the starting period (season) used for calculating the Average Monthly Usage (AMU) will be adjusted. This field does not impact the Trend Percent calculation.</p> <p>A positive value will start the season earlier (increases the starting period). A negative value will start the season later (decreases the starting period). The value in either direction (positive or negative) cannot exceed 3 months.</p>

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Seasonal Line-Up</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

### Function Keys

<p>F5=Mark as Reviewed F5=Mark for Review</p>	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
<p>F7=Full Msg / F7=Abbr Msg</p>	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>

Field/Function Key	Description
F9=Item Usage	Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management & Planning User Guide for details about this screen.
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a> .
F24=Delete	Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> .

## Exception Center - Stocked Item Zero OP/LP With Hits Screen

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                EXCEPTION CENTER - PWS EXCEPTION
                Stocked Item Zero OP/LP With Hits
Item Number: A200                               Warehouse: 1

This product has both the Order Point and Line Point permanently set to zero.
There have been 40 hits recorded against this product in the last 3 months.

Values at Time of Exception
-----
Order Point:      .000   Maintenance Code: 0   Status: Stocked
Line Point:       .000   Maintenance Code: 0   Hits:           40
Parameter Settings and Record Levels
-----
Months to Use:    3     Level: Company
Minimum Hits:     25    Level: Company

F5=Mark as Reviewed      F9=Item Usage   F12=Return   F24=Delete

```

This screen appears after you select a Stocked Item Zero OP/LP with Hits exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Stocked Item Zero OP/LP with Hits exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Stocked Item Zero OP/LP With Hits Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.
<b>Value at Time of Exception</b>	
Order Point	The order point for the item, at time of exception.

Field/Function Key	Description
Maintenance Code	The maintenance code for the corresponding order point. <b>O</b> (Override) displays if the variable has been permanently overridden by the value shown.
Status	The status of the item, at time of exception. Stocked will appear when the item is defined as an item that has <b>Update Inventory = Y</b> and <b>Discontinued = N</b> in Item Master Maintenance (MENU IAFILE). The exception will only be generated for items with a status of Stocked.
Line Point	The line point for the item, at time of exception.
Maintenance Code	The maintenance code for the corresponding line point. <b>O</b> (Override) displays if the variable has been permanently overridden by the value shown.
Hits	The total number of line hits for the item during the <b>Months to Use</b> time frame, at time of exception. Line hits are the number of times this item appears on a sales order, warehouse transfer, or lost business transaction, regardless of quantity or the unit of measure.
<b>Parameter Settings and Record Levels</b>	
Months to Use	Reflects how many months of hit data will be used with the Stocked Item with Zero OP/LP exception.
Level	The level where the value of the <b>Months to Use</b> was retrieved from (for example, System). Below reflects levels that are used. You will see what is following the equal sign. <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

Field/Function Key	Description
Minimum Hits	The minimum number of hits that must be met or exceeded in the number of months' time frame for the exception.
Level	<p>The level where the value of the <b>Minimum Hits</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

### Function Keys

F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
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Field/Function Key	Description
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>
F9=Item Usage	<p>Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management &amp; Planning User Guide for details about this screen.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a>.</p>
F24=Delete	<p>Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a>.</p>

## Exception Center - Threshold With Low Activity Screen

<u>EXCEPTION CENTER - TLA EXCEPTION</u>			
Item Number: A200		Threshold With Low Activity	
		Warehouse: 1	
This item has a Minimum Threshold Quantity of 1,000.000 which requires a minimum of 100 hits within 6 months. There have been 40 hits within the last 6			
<u>Values at Time of Exception</u>			
Order Point:	20.000	Calculated Qty Change:	980.000
Actual Hits:	40	Calculated Qty Change %:	49.00
Usage Rate:	40		
<u>Parameter Settings and Record Levels</u>			
Min Threshold OP:	1,000.000	Lvl: Item/Wh	Threshold Exp: 12/31/17
Threshold Reference: Startup			
Min Qty Chg:	200.000	Lvl: Company	
Min Qty Chg %:	15.00	Lvl: Company	
Min Threshold Hits:	100	Lvl: Company	
Within # of Mths:	6	Lvl: Company	
Wait Months:	3	Lvl: Company	
F5=Mark as Reviewed   F7=Full Msg   F9=Item Usage   F12=Return   F24=Delete			

This screen appears after you select a Threshold with Low Activity exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Threshold with Low Activity exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Threshold With Low Activity Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.
<b>Values at Time of Exception</b>	
Order Point	The calculated order point, at time of exception, without the Threshold Order Point Adjuster applied.

Field/Function Key	Description
Calculated Qty Change	The calculated order point quantity change, at time of exception. The difference between Calculated Order Point and Minimum Threshold Order Point expressed as a Quantity.
Actual Hits	The calculated total number of line hits for the item during the number of months time frame, at time of exception.
Calculated Qty Change %	The calculated order point quantity change percentage, at time of exception. The difference between Calculated Order Point and Minimum Threshold Order Point expressed as a Percent.
Usage Rate	The total item usage, at time of exception.
<b>Parameter Settings and Record Levels</b>	
Min Threshold OP	The Minimum Threshold Order Point allowed for the item. If the order point calculated is less than this minimum, the order point will be adjusted up to this minimum as long as the ASQ, 5-Hi, or LUA adjusters were not greater.
Lvl	<p>The level where the <b>Min Threshold OP</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Threshold Reference	The type of adjustment made to the warehouse item's order point (i.e., the description indicating why this product was set up with a Threshold Minimum Order Point).
Threshold Exp	The date by which the Threshold Minimum Order Point will expire. If the date has expired, the Threshold Minimum Order Point will not be considered as an adjuster when order points are updated.

---

Field/Function Key	Description
Min Qty Chg	The minimum quantity change that must be met in order to generate the Threshold Low Activity Exception.
Lvl	<p>The level where the value of the <b>Min Qty Chg</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Min Qty Chg %	The minimum quantity change percent that must be exceeded for the Threshold Low Activity Exception to occur.

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Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Min Qty Chg %</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Min Threshold Hits	<p>The minimum number of threshold hits for the item.</p> <p>The limit for the number of hits that must be found in the months reviewed (based on the value in the <b>Months to Compare</b> field) in order for the Threshold Low Activity Exception to occur.</p>

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Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Min Threshold Hits</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"><li>• 1 = Subclass</li><li>• 2 = Class</li><li>• 3 = PLine</li><li>• 4 = Vendor</li><li>• 5 = Warehouse</li><li>• 6 = Company</li><li>• 7 = System</li><li>• S = Sys Dft</li><li>• I = Item/WH</li><li>• C = Company</li><li>• P = PLine</li><li>• V = Vendor</li><li>• W = Warehouse</li></ul>
Within # of Mths	<p>The number of months (time frame) to be looked at to collect and calculate the number of hits that can then be compared to the number of hits in the Total Hits Less Than in order for the Threshold Low Activity Exception to occur.</p>

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Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Within # of Mths</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>
Wait Months	<p>Threshold low activity parameters can be set to capture threshold order point adjustments as exceptions when they occur for items that match the values you key in the Threshold Low Activity fields.</p> <p>In Replenishment Options Maintenance (MENU AIFILE), you identify the wait period before exceptions can be generated. This is useful for new products, since a threshold is normally placed on an item that is new and does not have any history yet in order to accurately determine an item's order point (which will expire after a certain time when the product should then have enough history to calculate an accurate order point).</p> <p>This prevents an item from being overridden for possibly too long (bringing in more inventory than needed because the threshold increased the order point) if its actual sales were not in sync with the expectation of the threshold.</p> <p>This field reflects the wait months. The system will wait this number of months before checking if the item is on track, to prevent newly assigned thresholds from generating exceptions. The system ensures that the time between the threshold entry date and today's date has been met or exceeded by this wait months period before checking if the Threshold Low Activity Exception will be generated.</p>

Field/Function Key	Description
Lvl	<p>The level where the value of the <b>Wait Months</b> was retrieved from (for example, System).</p> <p>Below reflects levels that are used. You will see what is following the equal sign.</p> <ul style="list-style-type: none"> <li>• 1 = Subclass</li> <li>• 2 = Class</li> <li>• 3 = PLine</li> <li>• 4 = Vendor</li> <li>• 5 = Warehouse</li> <li>• 6 = Company</li> <li>• 7 = System</li> <li>• S = Sys Dft</li> <li>• I = Item/WH</li> <li>• C = Company</li> <li>• P = PLine</li> <li>• V = Vendor</li> <li>• W = Warehouse</li> </ul>

### Function Keys

<p>F5=Mark as Reviewed F5=Mark for Review</p>	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
<p>F7=Full Msg / F7=Abbr Msg</p>	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the message may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>

Field/Function Key	Description
F9=Item Usage	Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management & Planning User Guide for details about this screen.
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a> .
F24=Delete	Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> .

## Exception Center - Threshold Ready to Expire Screen

```

EXCEPTION CENTER - TRE EXCEPTION
Threshold Ready to Expire
Item Number: A200 Warehouse: 1

The threshold minimum order point of 30.000 for this item will expire on
1/31/16.

Values at Time of Exception
-----
Threshold Expires:          1/31/16 Usage Rate:          30
Minimum Threshold Order Point: 30.000 Usage Method: T
Threshold Reference: TREF5

F5=Mark as Reviewed          F9=Item Usage   F12=Return   F24=Delete

```

This screen appears after you select a Threshold Ready to Expire exception record for the indicated item/warehouse, and press **ENTER** on the [Exception Center - Exception List Screen](#).

Use this screen to view further details for the exception you selected. Note that for each exception that exists for an item and warehouse, a different screen is available with its associated information (this information changes on each screen, depending on the exception). This screen above reflects the information that is presented for a Threshold Ready to Expire exception.

All fields on this screen are for viewing purposes only.

### Exception Center - Threshold Ready to Expire Screen Fields and Function Keys

Field/Function Key	Description
Item Number	The item number for which detailed exception information is displayed.
Warehouse	The warehouse ID for which detailed exception information is displayed.
Message	The exception message, explaining the exception that occurred in Distribution A+. See <b>F7=FULL MSG</b> / <b>F7=ABBR MSG</b> for further details.

### Values at Time of Exception

Field/Function Key	Description
Threshold Expires	The date by which the Threshold minimum order point will expire, at time of exception. If the date has expired, the threshold minimum order point will not be considered as an adjuster when order points are updated.
Minimum Threshold Order Point	The minimum Threshold order point allowed for the item, at time of exception. If the order point calculated is less than this minimum, the order point will be adjusted up to this minimum as long as the ASQ, 5-Hi, or LUA adjusters were not greater.
Threshold Reference	The type of adjustment made to the warehouse item's order point (i.e., the description indicating why this product was set up with a Threshold minimum order point).
Usage Rate	The total item usage, at time of exception.
Usage Method	The method used to determine, at time of exception, the total item usage (for example, <b>Backward</b> method).
<b>Function Keys</b>	
F5=Mark as Reviewed F5=Mark for Review	<p><b>F5=MARK AS REVIEWED</b> appears if the record has not yet been marked as reviewed. <b>F5=MARK FOR REVIEW</b> appears if the record has already been marked as reviewed.</p> <p>Press <b>F5=MARK AS REVIEWED</b> to mark the record 'reviewed' so that users are aware that this AIM Exception Summary record has already been reviewed. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>Y</b> (yes) will display in the <b>R</b> (reviewed) column.</p> <p>Press <b>F5=MARK FOR REVIEW</b> to unmark a previously marked record if you want the record reviewed again. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> and <b>N</b> (no) will display in the <b>R</b> (reviewed) column.</p>
F7=Full Msg / F7=Abbr Msg	<p>Press the <b>F7=FULL MSG / F7=ABBR MSG</b> toggle function key to toggle between showing the full (entire) message or the abbreviated message.</p> <p>There are 10 lines of messages, but based on the available space on the screen and the type of exception, not all of the messages may be displayed. If more of the message exists (that is, there are more lines to the exception than what is shown on the screen), this key will appear and allow you to view the entire message. This key does not appear on the screen if the entire message fits in the space allotted.</p>

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Field/Function Key	Description
F9=Item Usage	Press <b>F9=ITEM USAGE</b> to review the item's demand and the values that make up that demand for the last twelve periods. The Item Usage Summary Screen will appear. Refer to Analyzing Planning Models (MENU IMMAIN) in the Infor Distribution A+ Inventory Management & Planning User Guide for details about this screen.
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Exception Center - Exception List Screen</a> .
F24=Delete	Press <b>F24=DELETE</b> to delete the indicated exception if you no longer want to see it in the Exception Center. You will be prompted to press <b>F24=DELETE</b> twice to confirm deletion. You will be returned to the <a href="#">Exception Center - Exception List Screen</a> .

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## Chapter 6 Interactive Forecasting

The Interactive Forecasting option on MENU AIMAIN allows for interactive forecasting of a planning model for a specific item. This tool helps you forecast items using different planning models.

This option forecasts sales for the next 12 months using the past 12 months of demand history (including both system generated and manual adjustments). It does not compare this forecast to the actual demand each month as the Planning Model Analysis does. Instead, Interactive Forecasting will give you the forecast for the next 12 months, given an item's demand history and planning model. The results of this forecast are displayed on a bar graph.

This option is shared with Inventory Management and Planning (IM&P). Refer to the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding Interactive Forecasting.

## Chapter 7 Printing the Usage Exception Report

Use the Usage Exception Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to print a report which shows items with stockouts, or items having a forecast with a significant difference from their actual demand.

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMREPT in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Usage Exception Report.

## Chapter 8 Printing the Expedite Report

Use the Expedite Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to print a report in Summary or Detail Format which shows vendors who supply items that are in danger of stocking out. Use this information to determine if a stock order is needed.

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMREPT in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Expedite Report.

## Chapter 9 Printing the Overstocked Inventory Report

Use the Overstocked Inventory Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to print a report which shows items that are significantly over maximum stocking levels (calculated as the minimum balance plus the order quantity).

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMREPT in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Overstocked Inventory Report.

## Chapter 10 Printing the Safety Stock Analysis Report

Use the Safety Stock Analysis Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to print a report which shows the value of safety stock based on current service levels. By contrasting an item's cost of current safety stock with its customer service levels and profitability, you will be able to determine if the current safety stock investment is allocated wisely. The projected service level with no safety stock is also printed to help you assess the relative costs and benefits of current service levels.

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMREPT in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Safety Stock Analysis Report.

## Chapter 11 Printing the Service Level Analysis Report

Use the Service Level Analysis Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to print a report which shows changes in costs resulting from changes in service levels. The savings associated with lowering service levels or the cost increase associated with an increase will be indicated.

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMREPT in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Service Level Analysis Report.

## Chapter 12 Printing the Forecast Edit Report

Use the Forecast Edit Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to print a report which shows items with current order quantities that are approaching or exceeding the forecast plan. This will help reduce stockouts caused by unusually large orders placed in advance.

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMREPT in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Forecast Edit Report.

## Chapter 13 Printing the Annual Forecasts Report

Use the Annual Forecasts Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to print a report which shows the monthly forecasts of selected items for a specified year.

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMREPT in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Annual Forecasts Report.

## Chapter 14 Printing the Manually Managed Items Report

Use the Manually Managed Items Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to print a report showing those items for which any of the AIM/IM&P calculated values have been overridden and are manually managed. This report can be printed at any time to review overridden values.

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMREPT in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Manually Managed Items Report.

## Chapter 15 Printing the Items by Model Report

Use the Items by Model Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to print a report which lists those planning models that have been assigned to each item in a warehouse.

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMREPT in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Items by Model Report.

## Chapter 16 Printing the Safety Stock Audit Report

Use the Safety Stock Audit Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to print a report of all items with a safety stock that is greater than a given percentage of the minimum on-hand quantity.

This option will also allow you to override the safety stock, minimum, and maximum on-hand quantities by a given number of months usage. If you choose to reforecast your items using a low usage model, any items whose variables are affected will print on the Model Change Report.

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMREPT in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Safety Stock Audit Report and the Model Change Report.

## Chapter 17 Printing the Lead Time History Report

Use the Lead Time History Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to print a report which shows the lead time history for purchase order history detail, items, item class/sub-classes, and vendors, depending on the level of detail selected.

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMREPT in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Lead Time History Report.

## Chapter 18 Printing the Item Demand 3-Year Report

Use the Item Demand 3-Year Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to print a report which shows the last three years (from the current month) of demand for selected items, with the demand displayed for each period of that year along with the year's totals.

This option is shared with Inventory Management and Planning (IM&P). Refer to MENU IMREPT in the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding the Item Demand 3-Year Report.

## Chapter 19 Printing the Line Hit Rank Analysis Report

Use the Line Hit Rank Analysis Report option on the Advanced Inventory Management Reports Menu (MENU AIREPT) to better manage the ranking of your items. Line Hits for items is the number of times a product appears on a sales order, warehouse transfer, or lost business transaction, regardless of quantity. By tracking a product's Line Hits (that is, the volume of transactions the item appears on), items can be ranked based on these 'hits' and categorized by the use of a rank code.

Line Hit Rank codes are defined through Replenishment Options Maintenance (MENU AIFILE) and provide detailed information such as the number of months usage related to an item's average monthly usage (AMU) and Economic Order Quantity (EOQ) calculations and parameters related to lead time safety adjustments. Through Replenishment Options Maintenance, you can also determine if the [Line Hit Analysis Report](#) will rank items based on the number or percentage of hits, and you can set up a specific rank to be assigned to 'new' items (less than a user-specified number of months old) so that the ranking for new items based on low hit numbers is not skewed.

A Default Rank Code for newly created AIBAL records is defined through AIM System Options Maintenance (MENU AIFILE) and each AIBAL's rank can be manually maintained. But, to help ensure your items are ranked appropriately, you can utilize this report to not only see the current rank of each AIBAL record, but to also show you the new ranks, calculated by the system, based on the current hits data for each item (as opposed to just using the Default Rank Code that was defined for the newly created AIBAL records in AIM system options). Note that the number of months used to collect the hit data is defined in the **Months of Line Hit History** field on the [Advanced Inventory Management Replenishment Options - Ranking Screen](#) in Replenishment Options Maintenance (MENU AIFILE).

You can run the report multiple times to view rank determinations, and it can be run in 'report only' or 'update' mode. Most often, you will run the report in the 'report only' mode, making adjustments desired to the rank definitions and/or adjustments to the hits themselves, until all items are ranked as needed and you are satisfied with the suggested new rankings printed. Once satisfied, the report can be run in the 'update' mode to automatically update the item's Line Hit Rank code in the Advanced Inventory Balance File (**AIBAL**).

You will also be able to limit the report to a warehouse or range of warehouses, and determine if the Manufacturer Item Number will print.

## Line Hit Rank Analysis Report

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">Line Hit Rank Analysis Report Selection Screen</a>	Use to specify criteria to print on the report and update the <b>Line Hit Rank</b> field in the Advanced Inventory Balance File ( <b>AIBAL</b> ), if needed.
<a href="#">Line Hit Analysis Report</a>	Prints Line Hits for items, which is the number of times a product appears on a sales order, warehouse transfer, or lost business transaction, regardless of quantity.



Field/Function Key	Description
Print Mfg Number	<p>This field determines whether or not manufacturers' item numbers will print on the <a href="#">Line Hit Analysis Report</a>. Manufacturers' item numbers are defined through Vendor/Item Information Maintenance (MENU POFILE) and/or Item Master Maintenance (MENU IAFILE). Accept the default or key <b>Y</b> if you want manufacturer's item numbers to print on the report.</p> <p><b>Default Value:</b> N (A 1) Required</p>
Update Line Hit Rank in Balance File	<p>Line Hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction, regardless of quantity. Ranking is a classification method of products based on those 'hits'.</p> <p>Use this field to designate if the <b>Line Hit Rank</b> code in the Advanced Inventory Balance File (<b>AIBAL</b>) will be calculated and updated for the indicated warehouse(s) when this option is run. The calculation and update will occur based on the Replenishment Ranking options setup for the items through Replenishment Options Maintenance (MENU AIFILE).</p> <p>Key <b>Y</b> to update the Line Hit Rank code in the Advanced Inventory Balance File (<b>AIBAL</b>). The report will print and the file will be updated.</p> <p>Key <b>N</b> if you do not want to update the Line Hit Rank code in the Advanced Inventory Balance File (<b>AIBAL</b>). Only the report will print.</p> <p><b>Default Value:</b> N (A 1) Required</p>
F3=Cancel	<p>Press <b>F3=CANCEL</b> to cancel this option and return to MENU AIREPT.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections and proceed to the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.</p>

# Line Hit Analysis Report

AI347 04/11/12 16.23.42		LINE HIT ANALYSIS REPORT					I6/APDEMO PAGE 1	
		WAREHOUSE 1 -Hartford, CT						
Warehouse From: 1		Warehouse Line Hits:					156	
To: 1		Update Line Hit Rank Code in the Item Balance File? Y						
Class	Item Number/Description Manufacturing No.	Vendor	Item Line Rank	Rpt Line Rank	Rank	% Of %	Cum %	Line Hits
30	A210 Sharp Copier Toner FG-8100	SF-8100 ss		A	1	17.95	17.95	28
10/1	A250 Fax Stand - Walnut AZ-3000	100 36 x 13 x 5.5	C	C	4	6.41	43.59	10
ED	A220 Pocket Planner Weekly Organizer XBC3000	300 cool red metal	C	C	5	5.13	48.72	8
80/2	A260 #6 3/4 White Envelopes 66790	200 20# Bond 500/Box	D	C	6	4.49	53.21	7
90	A330 Straight Trimmers Shears KP-1176	200 TEST	D	D	7	3.85	57.06	6
PA/PA	A500 File Folders - Manilla XJC8746	1400 Box of 100 - letter size	D	D	8	3.85	60.91	6
20	A190 3-Ring Binder - 2" Black 77774	200 aa	D	D	9	3.21	64.12	5
80/5	A240 Single Subject Wire Bound PC5981	200 Notebook	D	D	10	3.21	67.33	5

This report prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

This report prints Line Hits for items, which is the number of times a product appears on a sales order, warehouse transfer, or lost business transaction, regardless of quantity. By tracking a product's Line Hits (that is, the volume of transactions the item appears on), items can be ranked based on these 'hits' and categorized using a rank code.

To help ensure your items are ranked appropriately, this report shows you the current rank of each AIBAL record, as well as the new ranks, calculated by the system, based on the current hits data for each item (as opposed to just using the Default Rank Code that was defined for the newly created AIBAL records in AIM system options).

This report is sequenced by warehouse and item number for items that are not ranked. If items are ranked, they are sequenced by warehouse, item number, ranking, and number of line hits.

A new page prints when the warehouse changes.

## Line Hit Analysis Report

Report/Listing Fields	Description
Headings	<p>Program names appear on the upper left corner of the report followed by run date and time, report title, workstation ID, User ID, and page number.</p> <p>Summary of the selection criteria prints in the center of the headings area followed by the individual field headings.</p> <p>The warehouse or range of warehouses also print, as selected on the <a href="#">Line Hit Rank Analysis Report Selection Screen</a>, for which the Line Hit Rank code in the Advanced Inventory Balance File (<b>AIBAL</b>) was calculated and updated.</p>
Warehouse Line Hits	<p>The total number of Line Hits for all items in the warehouse print on the report. This total is calculated for each item using the <b>Months of Line Hit History</b> field on the <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a> in Replenishment Options Maintenance (MENU AIFILE).</p>
Update Line Hit Rank Code in the Item Balance File	<p>Indicates by <b>Y</b> or <b>N</b>, as selected on the <a href="#">Line Hit Rank Analysis Report Selection Screen</a>, if the Line Hit Rank code in the Advanced Inventory Balance File (<b>AIBAL</b>) was calculated and updated when the report was run.</p>
Class	<p>The code used to categorize the item(s) printed on the report, as defined in Item Class/Sub Class Maintenance (MENU IAFILE), and assigned to the item(s) through Item Master Maintenance (MENU IAFILE).</p>
Item Number/Description	<p>The item number and description of the item for which Line Hits occurred, and for which a rank was assigned.</p>
Manufacturing No.	<p>The manufacturers' item numbers will print on this report only if you selected <b>Y</b> in the <b>Print Mfg Number</b> field on the <a href="#">Line Hit Rank Analysis Report Selection Screen</a>.</p> <p>This is the manufacturer's number for the item. Manufacturers' item numbers are defined through Vendor/Item Information Maintenance (MENU POFILE) and/or Item Master Maintenance (MENU IAFILE). If you entered a manufacturer's item number through Vendor/Item Information Maintenance (MENU POFILE), that number will print on this report; otherwise, the manufacturer's number you entered through Item Master Maintenance (MENU IAFILE) will print.</p>
Vendor	<p>The vendor from whom the item is primarily purchased. The item is assigned to this vendor through Item Balance Maintenance (MENU IAFILE).</p>

Report/Listing Fields	Description
Item Line Rank	<p>The rank value that is currently in the Advanced Inventory Balance File (<b>AIBAL</b>). Possible values are:</p> <ul style="list-style-type: none"> <li>• blank</li> <li>• the number of detail ranks you specified to use (1-26 = A-Z, as set up through Replenishment Options Maintenance, MENU AIFILE)</li> </ul>
Rpt Line Rank	<p>The rank value that the report has assigned to the item(s). Possible values are:</p> <ul style="list-style-type: none"> <li>• blank</li> <li>• the number of detail ranks you specified to use (1-26 = A-Z, as set up through Replenishment Options Maintenance, MENU AIFILE)</li> </ul>
Rank	<p>The sequential number that is assigned to the item based on the total Line Hits for this item in this warehouse. It will be in order of the greatest amount of Line Hits to the least amount of Line Hits.</p>
% Of WH	<p>The percentage of Line Hits for this item in comparison to the total Line Hits of all items in this warehouse.</p>
Cuml %	<p>The item's cumulative percentage of Line Hits, calculated as:  <b>this item's Line Hit percent + the Line Hit percent of all higher ranked items</b></p> <p>This information can be used to help you determine where to separate your <b>A</b> rank items from your <b>B</b> rank items, etc.</p>
Line Hits	<p>The number of times the item appeared on a sales order, warehouse transfer, or lost business transaction, regardless of quantity.</p> <p>The number of line hits reflects the period of the last AIM Month-end.</p>

## Chapter 20 Maintaining Planning Models

The Planning Models option (MENU AIFILE) allows you to add new planning models or modify existing ones for use with Advanced Inventory Management (AIM). You define model weight values and other model characteristics to create the models that meet your needs. Use these models to determine which months of the demand history to use, and their relative importance when forecasting monthly usage.

This option is shared with Inventory Management and Planning (IM&P). Refer to the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding Planning Models.

## Chapter 21 Maintaining Monthly Forecast Quantities

This option allows you to create or modify forecast data for Inventory Management & Planning (IM&P) or Advanced Inventory Management (AIM), which is used for forecasting future demand. You may override forecasts for each item, and new forecasts may be added for future months' sales.

Item forecasts are automatically created and maintained by IM&P or AIM, unless overridden using this option. This option is shared between Inventory Management and Planning (IM&P) and Advanced Inventory Management (AIM).

Refer to the Infor Distribution A+ Inventory Management & Planning User Guide for details regarding Monthly Forecast Quantities.

**Note:** The **Planning Tool** defined for each planned item in Item Balance Maintenance (MENU IAFILE) determines whether IM&P or AIM data will be maintained through this option and printed through Monthly Forecast Quantities Listing (MENU IMFILE/MENU AIFILE). If the **Planning Tool** field is **I**, IM&P data will be maintained and printed. If the **Planning Tool** field is **A**, AIM data will be maintained and printed.

## Chapter 22 Maintaining Item Replacements/ Complements

The Item Replacements/Complements option (MENU AIFILE) allows you to create and maintain replacement, alternate, upgrade, complement, and pattern items. Complement, alternate, and upgrade items are used only in Order Entry. Replacement items may be used in Order Entry, Inventory Management and Planning (IM&P), and Advanced Inventory Management (AIM). Pattern items may be used in IM&P and AIM.

This option is shared with IM&P. Refer to the Infor Distribution A+ Inventory Management and Planning User Guide for details regarding Item Replacements/Complements.

## Chapter 23 Maintaining AIM Lead Time

Lead time is the number of days a vendor requires to deliver an item after it is ordered. Use this option to add, change or delete monthly lead time data. This data is used in the Order Point/Min and Line Point/Max quantities calculated by Advanced Inventory Management (AIM).

To monitor lead times, Purchasing provides vendor performance information. Use the Vendor Performance Inquiry (MENU POMAIN) and Vendor Performance Report (MENU POREPT) to determine if lead times should be adjusted. If a vendor's lead time needs to be adjusted, change the Advanced Inventory Variables File (through this option) to reflect that change for the months that vary. Distribution A+ will automatically increase the Order Point/Min balance for that vendor's items.

Lead times are copied to individual items stored in the AIM Balance File by the AIM Monthly Update (MENU AIMAST) or through Reset AIM Variables (MENU AIMAST).

Maintaining the AIM lead times through the Advanced Inventory Management File Maintenance Menu (MENU AIFILE) will update the AIM Lead Times Variables File (**AIVAL**).

### AIM Lead Time Maintenance

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

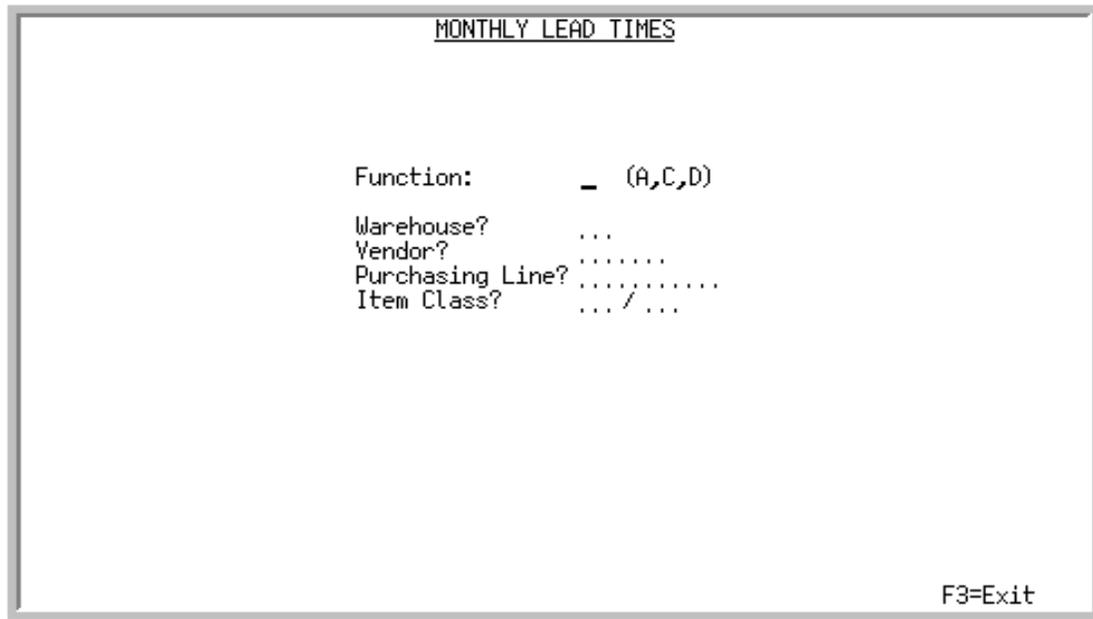
Title	Purpose
<a href="#">AIM Monthly Lead Times Selection Screen</a>	Use to add, change, or delete a monthly lead time.
<a href="#">AIM Monthly Lead Times Screen</a>	Use to enter the monthly values for the lead time.

### Restart Instructions

Restart by selecting this option from the same workstation. Change the lead time that was in use when the failure occurred; to determine this, run the AIM Monthly Lead Times Listing to verify the contents of the Advanced Inventory Variables File.

You will not be able to perform file maintenance on this record from another workstation until this step is completed.

## AIM Monthly Lead Times Selection Screen



This screen appears after you select option **6** - [AIM Lead Time Maintenance](#) from MENU AIFILE. Use this screen to add, change, or delete monthly lead times for a group of items, defined by:

- Warehouse Only
- Warehouse and Vendor
- Warehouse, Vendor, and Purchasing Line
- Warehouse, Vendor, Purchasing Line, and Item Class
- Warehouse, Vendor, Purchasing Line, and Item Class/Sub-Class
- Warehouse, Vendor, and Item Class
- Warehouse, Vendor, and Item Class/Sub-Class

**Note:** This is a hierarchy of item groups, from the most general to the most specific group. Lead times defined for a specific group are used to update the item in the Advance Inventory Balance File (**AIBAL**) before lead times in a more general group are used.

### AIM Monthly Lead Times Selection Screen Fields and Function Keys

Field/Function Key	Description
Function	Key <b>A</b> to add new monthly lead times for a group of items. Key <b>C</b> to change existing monthly lead times for a group of items. Key <b>D</b> to delete existing monthly lead times for a group of items. (A 1) Required

Field/Function Key	Description
Warehouse	<p>Key the warehouse for which monthly lead times are to be processed.</p> <p><b>Valid Values:</b> Any warehouse set up in Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (A 2) Required</p>
Vendor	<p>Use this field to define more specific groups of items that will be assigned lead times, having this as their primary vendor.</p> <p>Key the primary vendor for which monthly lead times are to be processed.</p> <p><b>Valid Values:</b> Any vendor defined in Vendor Master Maintenance (MENU IAFILE) (A 6) Optional; Required if Purchasing Line is selected</p>
Purchasing Line	<p>Use this field to define more specific groups of items that will be assigned lead times.</p> <p>Define monthly lead times specific to items having this as their purchasing line.</p> <p>Key the purchasing line for which monthly lead time are to be processed.</p> <p><b>Valid Values:</b> A valid purchasing line defined through Purchasing Line Maintenance (MENU POFIL2). (A 10) Optional</p>
Item Class	<p>Use this field to define more specific groups of items that will be assigned lead times.</p> <p>Key the item class and optional sub-class for which monthly lead times are to be processed.</p> <p>If no sub-class is identified, all sub-classes are included.</p> <p><b>Valid Values:</b> Any item class defined in Item Class/Sub Class Maintenance (MENU IAFILE) (A 2/A 2) Optional</p>
F3=Exit	<p>Press <b>F3=EXIT</b> to cancel this option and return to MENU AIFILE.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">AIM Monthly Lead Times Screen</a> will appear.</p>

## AIM Monthly Lead Times Screen

MONTHLY LEAD TIMES		ADD
Warehouse:	1	Hartford, CT
Vendor:	IC8000	BIG BEN CLOCK SHOP
Purchasing Line:		
Item Class:		
Lead Time Days:		
JAN:	- 7	
FEB:	..7	
MAR:	..7	
APR:	..7	
MAY:	..7	
JUN:	..7	
JUL:	..7	
AUG:	..7	
SEP:	..7	
OCT:	..7	
NOV:	..7	
DEC:	..7	
F5=Duplicate		F12=Return

This screen appears after you press **ENTER** on the [AIM Monthly Lead Times Selection Screen](#).

Use this screen to add, change, or delete monthly lead times for the warehouse, vendor, purchasing line, and/or item class/sub-class you specified on the [AIM Monthly Lead Times Selection Screen](#).

Lead times are presented by month, if the number of fiscal periods is defined as 12 in Sales Analysis Options Maintenance (MENU XAFILE). If the number of periods is defined as 13, lead times are presented by period.

### AIM Monthly Lead Times Screen Fields and Function Keys

Field/Function Key	Description
Lead Time Days	<p>This is the number of days a vendor requires to deliver items against a purchase order.</p> <p>Key the desired lead time for each month/period in the year. You may duplicate the lead time keyed in the first month by pressing <b>F5=DUPLICATE</b>.</p> <p>Refer to the AIM Variables chapter in this user guide for a detailed discussion of lead times.</p> <p><b>Default Value:</b> The default lead time defined in AIM System Options Maintenance (MENU AIFILE)</p> <p><b>Valid Values:</b> any value greater than zero (12 @ N 3,0) Required</p>

Field/Function Key	Description
F5=Duplicate	<p>The <b>F5=DUPLICATE</b> function key displays in the Add and Change mode only.</p> <p>This function key allows you to copy the value entered in the first month/ period over the remaining 11/12 months/periods. For example, to enter or change the lead times for all periods to 2, key <b>2</b> as the lead time for JAN (or PER01) and press <b>F5=DUPLICATE</b>. The lead times for all months will then be 2.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">AIM Monthly Lead Times Selection Screen</a>, without saving any additions/changes made to this screen.</p>
F24=Delete	<p>The <b>F24=DELETE</b> function key displays in the Delete mode only.</p> <p>Press <b>F24=DELETE</b> to delete the lead time record displayed. The <a href="#">AIM Monthly Lead Times Selection Screen</a> will appear and the record will be deleted.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">AIM Monthly Lead Times Selection Screen</a> will appear.</p>

---

## AIM Lead Time Listing

This option is used to print the [AIM Monthly Lead Times Listing](#). This listing shows the lead times defined through AIM Lead Time Maintenance (MENU AIFILE).

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">AIM Monthly Lead Times Listing Screen</a>	Use to specify the limiting criteria for the listing.
<a href="#">AIM Monthly Lead Times Listing</a>	Prints a list of lead time definitions that match the limiting criteria.

---

## AIM Monthly Lead Times Listing Screen

**MONTHLY LEAD TIMES LISTING**

Warehouse?	_ .	To? ...
Vendor:	.....	To: .....
Purchasing Line?	.....	To? .....
Item Class?	... / ...	To? ... / ...

F3=Cancel

This screen appears after you select option **16** - [AIM Lead Time Listing](#) from MENU AIFILE. Use this screen to select the criteria which will limit the lead times to print on the AIM Monthly Lead Times Listing. Only the lead times that match the criteria entered in these fields will print on the listing.

Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

### AIM Monthly Lead Times Listing Screen Fields and Function Keys

Field/Function Key	Description
Warehouse	Use this field to enter the warehouse or range of warehouses for which lead times will print on the <a href="#">AIM Monthly Lead Times Listing</a> . <b>Valid Values:</b> A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (2 @ A 2) Optional
Vendor	Use this field to enter the vendor or range of vendors to include in the listing. <b>Valid Values:</b> A vendor defined through Vendors Maintenance (MENU POFIELD/MENU APFILE). (2 @ A 6) Optional

Field/Function Key	Description
Purchasing Line	<p>Use this field to enter the purchasing line or range of purchasing lines to include in the listing.</p> <p><b>Valid Values:</b> A valid purchasing line defined through Purchasing Line Maintenance (MENU POFIL2).</p> <p>(2 @ A 10) Optional</p>
Item Class	<p>Use this field to enter the item class/sub-class or range of item classes/sub-classes of the items to include in the listing. If the sub-class is left blank, all sub-classes within the item class indicated will print.</p> <p><b>Valid Values:</b> Item classes are defined through Item Class/Sub Class Maintenance (MENU IAFIL2) and are assigned to items through Item Master Maintenance (MENU IAFIL2).</p> <p>(2 @ A 2 / A 2) Optional</p>
F3=Cancel	<p>Press <b>F3=CANCEL</b> to cancel this option and return to MENU AIFILE.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections and proceed to the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.</p>

## AIM Monthly Lead Times Listing

AI825 17/04/12 18.15.17		MONTHLY LEAD TIMES LISTING												AY/APDEMO	PAGE: 1	
		* Data may have been omitted due to security considerations *														
All Vendors		Warehouse From: 2				All Classes				All Purchasing Lines						
		To: 4														
WH	Vendor	Purchasing Line	Item Class/Sub	Per 01	Per 02	Per 03	Per 04	Per 05	Per 06	Per 07	Per 08	Per 09	Per 10	Per 11	Per 12	Per 13
2				43	42	41	40	39	38	37	36	35	34	33	32	

This report prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

The lead times defined through AIM Lead Time Maintenance (MENU AIFILE) are printed in warehouse, vendor, purchasing line, and item class/sub-class sequence.

**Note:** The message “\* Data may have been omitted due to security considerations \*” will print when the user that generated this listing is not authorized to all the warehouse selected data, as determined through Authority Profile Maintenance (MENU XASCTY).

The following information, for each month/period for which monthly lead times exist, is printed (depending on security warehouse considerations):

- **Company**
- **Warehouse**
- **Vendor**
- **Purchasing Line**
- **Item Class/Sub-Class**
- **Per/Month:** The lead time days for each period or month associated with the given warehouse, vendor, purchasing line, and item class/sub-class.

## Chapter 24 Maintaining AIM Order Frequency

Order frequency is the number of days between placing purchase orders for an item. The order frequency should allow enough time between orders to allow each purchase order to exceed the vendor weight and monetary amount minimums. These minimums are defined in Vendor Master Maintenance (MENU POFIL). Use this option to add, change, or delete monthly order frequencies.

Order frequencies are copied to individual items stored in the AIM Balance File by the AIM Monthly Update (MENU AIMAST), or through Reset AIM Variables (MENU AIMAST).

Maintaining the AIM order frequencies through the Advanced Inventory Management File Maintenance Menu (MENU AIFILE) will update the AIM Order Frequency Variables File (AIVAF).

### AIM Order Frequency Maintenance

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">AIM Monthly Ordering Frequency Selection Screen</a>	Use to maintain ordering frequencies for a group of items.
<a href="#">AIM Monthly Order Frequency Screen</a>	Use to enter the monthly values for the ordering frequencies.

## AIM Monthly Ordering Frequency Selection Screen

```
MONTHLY ORDERING FREQUENCY

Function:      _ (A,C,D)
Warehouse?    ...
Vendor?       .....
Purchasing Line? .....
Item Class?   ... / ...

F3=Exit
```

This screen appears after you select option 7- [AIM Order Frequency Maintenance](#) from MENU AIFILE. Use this screen to add, change, or delete monthly ordering frequencies for a group of items, defined by:

- Warehouse Only
- Warehouse and Item Class
- Warehouse and Item Class/Sub-Class
- Warehouse and Vendor
- Warehouse, Vendor, and Item Class
- Warehouse, Vendor, and Item Class/Sub-Class
- Warehouse, Vendor, and Purchasing Line
- Warehouse, Vendor, Purchasing Line, and Item Class
- Warehouse, Vendor, Purchasing Line, and Item Class/Sub-Class

**Note:** This is a hierarchy of item groups, from the most general to the most specific group. Order frequencies defined for a specific group are used to update the item in the Advance Inventory Balance File (**AIBAL**) before order frequencies in a more general group are used.

### AIM Monthly Ordering Frequency Selection Screen Fields and Function Keys

Field/Function Key	Description
Function	<p>Key <b>A</b> to add new monthly order frequencies for a group of items.</p> <p>Key <b>C</b> to change existing monthly order frequencies for a group of items.</p> <p>Key <b>D</b> to delete existing monthly order frequencies for a group of items.</p> <p>(A 1) Required</p>
Warehouse	<p>Key the warehouse for which monthly order frequencies are to be processed.</p> <p><b>Valid Values:</b> A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).</p> <p>(A 2) Required</p>
Vendor	<p>Use this field to define more specific groups of items that will be assigned order frequencies, having this as their primary vendor.</p> <p>Key the primary vendor for which monthly order frequencies are to be processed.</p> <p><b>Valid Values:</b> Any vendor defined in Vendor Master Maintenance (MENU POFIL).</p> <p>(A 6) Optional</p>
Purchasing Line	<p>Use this field to define more specific groups of items that will be assigned order frequencies.</p> <p>Define order frequencies specific to items having this as their purchasing line.</p> <p>Key the purchasing line for which monthly order frequencies are to be processed.</p> <p><b>Valid Values:</b> A valid purchasing line defined through Purchasing Line Maintenance (MENU POFIL2).</p> <p>(A 10) Optional</p>
Item Class	<p>Use this field to define more specific groups of items that will be assigned order frequencies.</p> <p>Key the item class and optional sub-class for which monthly order frequencies are to be processed.</p> <p>If no sub-class is identified, all sub-classes are included.</p> <p><b>Valid Values:</b> Any item class defined in Item Class/Sub Class Maintenance (MENU IAFILE).</p> <p>(A 2/A 2) Optional</p>

Field/Function Key	Description
F3=Exit	Press <b>F3=EXIT</b> to cancel this option and return to MENU AIFILE.
Enter	Press <b>ENTER</b> to confirm your selections. The <a href="#">AIM Monthly Order Frequency Screen</a> will appear.

---

## AIM Monthly Order Frequency Screen

MONTHLY ORDER FREQUENCY		ADD
Warehouse:	1	Hartford, CT
Vendor:	IC8000	BIG BEN CLOCK SHOP
Purchasing Line:		
Item Class:		
Order Frequency Days:		
JAN:	. 14	
FEB:	. 14	
MAR:	. 14	
APR:	. 14	
MAY:	. 14	
JUN:	. 14	
JUL:	. 14	
AUG:	. 14	
SEP:	. 14	
OCT:	. 14	
NOV:	. 14	
DEC:	. 14	
F5=Duplicate		F12=Return

This screen appears after you press **ENTER** on the [AIM Monthly Ordering Frequency Selection Screen](#).

Use this screen to add, change, or delete monthly order frequencies for the warehouse, vendor, purchasing line, and/or item class/sub-class you specified on the [AIM Monthly Ordering Frequency Selection Screen](#).

Order frequencies are presented by month, if the number of fiscal periods is defined as 12 in Sales Analysis Options Maintenance (MENU XAFILE). If the number of periods is defined as 13, order frequencies are presented by period.

### AIM Monthly Order Frequency Screen Fields and Function Keys

Field/Function Key	Description
Warehouse	The warehouse number and description of the warehouse entered on the <a href="#">AIM Monthly Ordering Frequency Selection Screen</a> will display, as defined through Warehouse Numbers Maintenance (MENU IAFILE). Display
Vendor	The vendor number and description of the vendor entered on the <a href="#">AIM Monthly Ordering Frequency Selection Screen</a> will display, as defined through Vendors Maintenance (MENU POFILE/MENU APFILE). Display

Field/Function Key	Description
Purchasing Line	<p>The purchasing line number and description of the purchasing line entered on the <a href="#">AIM Monthly Ordering Frequency Selection Screen</a> will display, as defined through Purchasing Line Maintenance (MENU POFIL2).</p> <p>Display</p>
Item Class	<p>The item class number and optional sub-class number and description of the item class/sub-class entered on the <a href="#">AIM Monthly Ordering Frequency Selection Screen</a> will display, as defined through Item Class/Sub Class Maintenance (MENU IAFIL2).</p> <p>Display</p>
Order Frequency	<p>This is the number of days between placing purchase orders.</p> <p>Key the desired order frequency for each month/period in the calendar year. You may duplicate the order frequency keyed in the first month by pressing <b>F5=DUPLICATE</b>. For example, if you order from a vendor every other week, the order frequency is <b>14</b>.</p> <p>Refer to the AIM Variables chapter in this user guide for a detailed discussion of order frequencies.</p> <p><b>Default Value:</b> The default order frequency defined in AIM System Options Maintenance (MENU AIFILE)</p> <p><b>Valid Values:</b> any value greater than zero (12 @ N 3,0) Required</p>
F5=Duplicate	<p>The <b>F5=DUPLICATE</b> function key displays in the Add and Change mode only.</p> <p>The <b>F5=DUPLICATE</b> function key allows you to copy the value entered in the first month/period over the remaining 11/12 months/periods. For example, to enter or change the order frequencies for all periods to 14, key <b>14</b> as the order frequency for Jan (or PER01) and press <b>F5=DUPLICATE</b>. The order frequency for all months will then be 14.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">AIM Monthly Ordering Frequency Selection Screen</a>, without saving any additions/changes made to this screen.</p>
F24=Delete	<p>The <b>F24=DELETE</b> function key displays in the Delete mode only.</p> <p>Press <b>F24=DELETE</b> to delete the order frequency record displayed. The <a href="#">AIM Monthly Ordering Frequency Selection Screen</a> will appear and the record will be deleted.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">AIM Monthly Ordering Frequency Selection Screen</a> will appear.</p>

---

## AIM Order Frequency Listing

This option is used to print the AIM Monthly Order Frequency Listing. This listing shows the order frequencies defined through AIM Order Frequency Maintenance (MENU AIFILE).

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">AIM Monthly Order Frequency Listing Screen</a>	Use to specify the limiting criteria for the listing.
<a href="#">AIM Monthly Order Frequency Listing</a>	Prints a list of order frequency definitions that match the limiting criteria.

---

## AIM Monthly Order Frequency Listing Screen

MONTHLY ORDER FREQUENCY LISTING

Warehouse?	_ .	To? ...	
Vendor:	.....	To:	.....
Purchasing Line?	.....	To?	.....
Item Class?	... / ...	To?	... / ...

F3=Cancel

This screen appears after you select option **17** - [AIM Order Frequency Listing](#) from MENU AIFILE. Use this screen to select the criteria which will limit the order frequencies to print on the AIM Monthly Order Frequency Listing. Only the order frequencies that match the criteria entered in these fields will print on the listing.

Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

### AIM Monthly Order Frequency Listing Screen Fields and Function Keys

Field/Function Key	Description
Warehouse	<p>Use this field to enter the warehouse or range of warehouses for which order frequencies will print on the <a href="#">AIM Monthly Order Frequency Listing</a>.</p> <p><b>Valid Values:</b> A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).</p> <p>(2 @ A 2) Optional</p>
Vendor	<p>Use this field to enter the vendor or range of vendors to include in the listing.</p> <p>(2 @ A 6) Optional</p>

Field/Function Key	Description
Purchasing Line	<p>Use this field to enter the purchasing line or range of purchasing lines to include in the listing.</p> <p><b>Valid Values:</b> A valid purchasing line defined through Purchasing Line Maintenance (MENU POFIL2).</p> <p>(2 @ A 10) Optional</p>
Item Class	<p>Use this field to enter the item class/sub-class or range of item classes/sub-classes of the items to include in the listing. If the sub-class is left blank, all sub-classes within the item class indicated will print.</p> <p>Item classes are defined through Item Class/Sub Class Maintenance (MENU IAFIL2) and are assigned to items through Item Master Maintenance (MENU IAFIL2).</p> <p>(2 @ A 2 / A 2) Optional</p>
F3=Cancel	<p>Press <b>F3=CANCEL</b> to cancel this option and return to MENU AIFILE.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections and proceed to the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide</p>

# AIM Monthly Order Frequency Listing

AI835 17/04/12 18.26.01		MONTHLY ORDER FREQUENCY LISTING											AY/APDEMO	PAGE: 1		
		* Data may have been omitted due to security considerations *														
All Vendors		Warehouse From: 2				All Classes				All Purchasing Lines						
		To: 4														
WH	Vendor	Purchasing Line	Item Class/Sub	Per 01	Per 02	Per 03	Per 04	Per 05	Per 06	Per 07	Per 08	Per 09	Per 10	Per 11	Per 12	Per 13
2				24	24	24	24	24	24	24	24	24	24	24	24	24
2	200		10	6	6	6	6	6	6	6	6	6	6	6	6	6

This report prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

The order frequencies defined through AIM Order Frequency Maintenance (MENU AIFILE) are printed in warehouse, vendor, purchasing line, and item class/sub-class sequence.

**Note:** The message “\* Data may have been omitted due to security considerations\*” will print when the user that generated this listing is not authorized to all the warehouse selected data, as determined through Authority Profile Maintenance (MENU XASCTY).

The following information, for each month/period for which monthly order frequencies exist, is printed (depending on warehouse security considerations):

- **Warehouse**
- **Vendor**
- **Purchasing Line**
- **Item Class/Sub-Class**
- **Per/Month:** The order frequency for each period or month associated with the given warehouse, vendor, purchasing line, and item class/sub-class.

## Chapter 25 Maintaining AIM Options

AIM Options Maintenance (MENU AIFILE) is used to enter and change tailoring options which determine default values and operational characteristics of Advanced Inventory Management (AIM). There are two types of options:

- **System options:** Pertain to all companies, and include default variables, default model, and default minimum and maximum balance maintenance codes.
- **Company options:** Define default values for each company, and include carrying cost percent, PO processing cost, calendar type, and the report options.

Use this option when installing AIM, or as needed to change AIM options.

**Note:** If using this option upon AIM installation, create the system options before company options.

### AIM Options Maintenance

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">Advanced Inventory Management Options Maintenance Screen</a>	Use this screen to add or change system options, or options for a new or existing company.
<a href="#">Advanced Inventory Management System Options Screen</a>	Use this screen to set up variable default values for all companies using AIM.
<a href="#">Advanced Inventory Management System Options - Continued Screen</a>	Use this screen to set up additional variable default values for all companies using AIM.
<a href="#">Advanced Inventory Management System Options - Additional Screen</a>	Use this screen to determine if the Low Usage Order Point Adjuster will be used for all companies using AIM and, if so, how many months to use the adjuster.
<a href="#">Low Usage Order Point Adjuster System 1 Screen</a>	Use this screen to add, change, or delete the Hits Greater Than number to be used for adjusting the order point.

Title	Purpose
<a href="#">Low Usage Order Point Adjuster List Screen</a>	Use this screen to review low usage order point adjusters previously defined. You can select one for change or deletion, if necessary.
<a href="#">Low Usage Order Point Adjuster System 2 Screen</a>	Use this screen to add, change, or delete the <b>Cost Less Than</b> number to be used for adjusting the order point.
<a href="#">Advanced Inventory Management Company Options Screen</a>	Use this screen to set up default values for a specific company.
<a href="#">Advanced Inventory Management Company Options - Report Defaults Screen</a>	Use this screen to set up report default values for the default company for the following reports used in the AIM module.
<a href="#">Advanced Inventory Management Company Options - SS Report Default Options Screen</a>	Use this screen to identify default values to be presented when generating the Safety Stock Audit Report.

## Advanced Inventory Management Options Maintenance Screen

```

ADVANCED INVENTORY MANAGEMENT OPTIONS MAINTENANCE

Company Number? - . 00 for system options
                   01-99 for company options

F3=Exit
  
```

This screen appears after you select option **9** - [AIM Options Maintenance](#) from MENU AIFILE.

Use this screen to add or change system options, or options for a new or existing company.

### Advanced Inventory Management Options Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Company Number	<p>Use this field to maintain system options for all companies using AIM, or options for a single company.</p> <p>Key <b>0</b> or leave blank to add or change system options for all companies using AIM.</p> <p>Key the number of the company (<b>01-99</b>) for which options will be added or changed.</p> <p><b>Note:</b> Create system options (<b>0</b>) before company options.</p> <p><b>Valid Values:</b> 0 for system options; a valid company number defined through Company Name Maintenance (MENU XAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).</p> <p>(N 2,0) Required</p>
F3=Exit	Press <b>F3=EXIT</b> to cancel this option and return to MENU AIFILE.

Field/Function Key	Description
Enter	<p>Press <b>ENTER</b> to confirm your selections.</p> <p>If you are maintaining system options, the <a href="#">Advanced Inventory Management System Options Screen</a> will appear.</p> <p>If you are maintaining company options, the <a href="#">Advanced Inventory Management Company Options Screen</a> will appear.</p>

---

## Advanced Inventory Management System Options Screen

```

ADVANCED INVENTORY MANAGEMENT SYSTEM OPTIONS

Default Lead Time:          10,
Default Order Frequency:    14,

Default Model?              NCONM2,

Default Min Balance Maint Code: A,      (O/A)
Default Max Balance Maint Code: A,      (O/A)

Update Vendor/Item Lead Times: Y,      (Y/N)
Average Monthly Days:       30,      (1 to 31)
Trending Factor:            .5,      (0.0 to 1.0)

Default Months for Order Stats: 12,      (1-12 months)

Current Forecast Period:    1/15,
Buying Information View:    L,      (F=Forecast; L=Line Hits)

F12=Return

```

This screen appears if you entered **0** or left the **Company Number** field blank on the [Advanced Inventory Management Options Maintenance Screen](#) to maintain system options.

Use this screen to set up variable default values for all companies using AIM. The default system values entered here will be assigned to Advanced Inventory planned items for which specific variables have not been defined.

**Example:** Assume that item A1500 is a new item that has been assigned item class CC through Item Master Maintenance (MENU IAFILE). When defining this item for warehouse 1 through Item Balance Maintenance (MENU IAFILE), you choose to also define the planning information for the item (**Plan** field is **Y**). If monthly values have not been assigned to the lead time and order frequency variables for warehouse 1 and item class CC, the values for these variables that are defined through this option are used as the default for item A1500.

The variables defined on this screen are also used as the default values when creating monthly lead times and order frequencies.

**Advanced Inventory Management System Options Screen Fields and Function Keys**

Field/Function Key	Description
Default Lead Time	<p>Lead time is the number of days a vendor requires to deliver items after a purchase order has been placed.</p> <p>This value will default as the lead time for items created in the Advanced Inventory Balance File, if lead times have not been defined for a corresponding group of items through Lead Time Maintenance (MENU IMFILE).</p> <p>Key the default lead time in days. If left blank, the field will default to <b>0</b>.</p> <p>(N 3,0) Optional</p>
Default Order Frequency	<p>This is the number of days between placing purchase orders. For example, if you order from a vendor every other week, the order frequency is 14.</p> <p>This value will default as the order frequency for items created in the Advanced Inventory Balance File, if order frequencies have not been defined for a corresponding group of items through Order Frequency Maintenance (MENU IMFILE).</p> <p>Key the default order frequency in days. If left blank, the field will default to <b>0</b>.</p> <p>(N 3,0) Optional</p>
Default Model	<p>This default model code is assigned to new items created through Item Balance Maintenance (MENU IAFILE). This default model code is also used when creating default planning information through Create AIM Balance Records (MENU AIMAST). The <b>Model</b> for AIM planned items provides the ability to see sales forecasts on the Buying Information Screen in the Interactive Forecasting Inquiry (MENU IMMMAIN/AIMAIN).</p> <p>Key the six-character Model ID to be assigned to all newly planned items.</p> <p>If no planning models have been defined through Planning Models Maintenance (MENU AIFILE/MENU IMFILE), you can add a model through this option using the <b>F6=ADD MODEL</b> function key. Refer to the description for that key for additional information.</p> <p>(A 6) Required</p>

Field/Function Key	Description
Default Min Balance Maint Code	<p>This is the default minimum balance maintenance code that is assigned to a new item created through Item Balance Maintenance (MENU IAFILE), or to a group of items through Create AIM Balance Records (MENU AIMAST). This default value may be overridden during AIM Balance Maintenance (MENU AIFILE).</p> <p>This code determines if AIM will automatically calculate an item's order point/minimum balance, or if you will override the calculated value with a different value.</p> <p>Key <b>A</b> if the order point/minimum balance is to be calculated automatically by AIM.</p> <p>Key <b>O</b> if you wish to override the order point/minimum balance calculated by AIM. You must supply the overridden order point/minimum balance through AIM Balance Maintenance (MENU AIFILE).</p> <p>(A 1) Required</p>
Default Max Balance Maint Code	<p>This is the default maximum balance maintenance code that is assigned to a new item created through Item Balance Maintenance (MENU IAFILE), or to a group of items through Create AIM Balance Records (MENU AIMAST). This default value may be overridden during AIM Balance Maintenance (MENU AIFILE).</p> <p>This code determines if AIM will automatically calculate an item's line point/maximum balance, or if you will override the calculated value with a different value.</p> <p>Key <b>A</b> if the line point/maximum balance is to be calculated automatically by AIM.</p> <p>Key <b>O</b> if you wish to override the line point/maximum balance calculated by AIM. You must supply the overridden line point/maximum balance through AIM Balance Maintenance (MENU AIFILE).</p> <p>(A 1) Required</p>

Field/Function Key	Description
Update Vendor/Item Lead Times	<p>Key <b>Y</b> to update the Vendor/Item File in Purchasing with lead times used in the AIM module, when resetting AIM variables through Reset AIM Variables (MENU AIMAST) or the AIM Monthly Update (MENU AIMAST). Lead times will be rounded to a whole number.</p> <p>When updating the lead time in the Vendor/Item File, certain rules apply. The lead time used in Purchasing is determined as follows:</p> <ul style="list-style-type: none"> <li>• Use the lead time from the AIM Balance File (for the default warehouse) if the vendor matches the vendor in the Vendor/Item File.</li> <li>• Use the lead time from the AIM Balance File for the first warehouse with a vendor number matching the vendor in the Vendor/Item File. Warehouses are searched alphabetically.</li> <li>• Search the AIM Variables File for the most specific lead time pertaining to the item, vendor and default warehouse.</li> <li>• Use the default value from this options record.</li> </ul> <p>Key <b>N</b> if you do not want the lead times in the Vendor/Item File [that have been specified through Vendor/Item Information Maintenance (MENU POFIL)] updated with the lead times assigned to an item through AIM. The lead times may then differ in the Vendor/Item File and the AIM Balance File.</p> <p>(A 1) Required</p>
Average Monthly Days	<p>Use this field to define the average number of days in a month (usually 30).</p> <p>This value will be used in multiple calculations throughout AIM.</p> <p><b>Default Value:</b> 30</p> <p>Recommended Value: 30</p> <p>(N 2,0) Required</p>
Trending Factor	<p>This field is used in the forecast calculation to determine how trends of demand history will be used. The dampening factor can vary between 00 (no trending -eliminating trend detection in the forecast), and 1.0 (complete trending continuing with the trend without reducing it over the next 12 months). The <b>Trending Factor</b> for AIM planned items provides the ability to see sales forecasts on the Buying Information Screen in the Interactive Forecasting Inquiry (MENU IMMAIN/AIMAIN).</p> <p>Key the factor to adjust your item forecast. If left blank, the value assumed is <b>0</b>.</p> <p><b>Default Value:</b> .5</p> <p><b>Valid Values:</b> 0 to 1, in .1 increments</p> <p>(N 2,1) Optional</p>

Field/Function Key	Description
Default Months for Order Stats	<p>This is the default number of months of order statistics that will display on the Order Statistics Screen, accessed through Interactive Forecasting (MENU AIMAIN). You may change this default on the Order Statistics Screen.</p> <p>Key the default number of months to display.</p> <p><b>Default Value:</b> 1</p> <p><b>Valid Values:</b> 1 - 12</p> <p>(N 2,0) Required</p>
Current Forecast Period	<p>This field will appear only if AIM has been activated through Activate AIM (MENU AIMAST).</p> <p>This field represents the current forecast period. This period reflects the calendar date, regardless of whether your business operates on a calendar basis or a fiscal basis. The value of this field impacts how forecasting variables are calculated.</p> <p>Key the calendar date. This forecast date will display on both of the forecast quantity maintenance screens in for convenience.</p> <p>(N 4,0) Required</p>
Buying Information View	<p>This field defines the initial view of the right portion of the <i>Buying Information Screen - AIM</i> for AIM planned items; this screen is explained in the Interactive Forecasting Inquiry (MENU IMMAIN) of the Infor Distribution A+ Inventory Management &amp; Planning User Guide. The right portion of the <i>Buying Information Screen - AIM</i> toggles between displaying the item forecast and line hits information.</p> <p>Key <b>F</b> to have the item forecast information display as the initial default view on the <i>Buying Information Screen - AIM</i>.</p> <p>Key <b>L</b> to have the item line hits information display as the initial default view on the <i>Buying Information Screen - AIM</i>.</p> <p><b>Default Value:</b> L</p> <p>(A 1) Required</p>
F6=Add Model	<p>The <b>F6=ADD MODEL</b> function key appears only after you press <b>ENTER</b> on this screen and no models have been defined through Planning Models Maintenance (MENU AIFILE/MENU IMFILE).</p> <p>Press the <b>F6=ADD MODEL</b> function key to add a planning model. The Planning Model Maintenance Selection Screen will appear, as explained in the Infor Distribution A+ Inventory Management &amp; Planning User Guide.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Options Maintenance Screen</a> without saving any additions/changes made to this screen.</p>

Field/Function Key	Description
Enter	Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management System Options - Continued Screen</a> will appear.

## Advanced Inventory Management System Options - Continued Screen

```

ADVANCED INVENTORY MANAGEMENT SYSTEM OPTIONS - CONTINUED

Use ASQ:                Y
Use SHI:                Y
Default Rank Code:     C
Usage:
  Method:               B
  Months:               .6
Safety:
  Type:                 P, 50.00
  Assure at least equal to: .7 days.
  Assure at most equal to: .30 days.
Safety Rounding:
  Round up to whole number: Y
  Minimum Hits:         .....3
  Cost if less than:    .....50.00, US$
OP/OQ/LP/EOQ Rounding: N
Seasonal Item Parameters:
  Advance by Lead Time: N

F12=Return

```

This screen appears after you press **ENTER** on the [Advanced Inventory Management System Options Screen](#).

Use this screen to set up additional variable default values for all companies using AIM. The default system values entered here will be assigned to Advanced Inventory planned items for which specific variables have not been defined. The variables defined on this screen are also used as the default values when creating monthly lead times and order frequencies.

**Advanced Inventory Management System Options-Continued Screen Fields & Function Keys**

Field/Function Key	Description
Use ASQ	<p>This field determines the default value that will be used at the Replenishment level, if a value is not entered at that level. This field also is available at the Item Balance level and you will be allowed to override this value in Item Balance Maintenance (MENU IAFILE), if needed.</p> <p>Use this field to select the default value for whether or not Average Sales Quantity (ASQ) calculations will be performed when determining the order point value.</p> <p>Instituting ASQ factors into the resulting order point will allow you to better manage products that experience exceptional usage, better manage customer buying habits on a product-by-product basis (since the order point is adjusted on products based on customer's actual buying habits) and improve customer service.</p> <p>ASQ is calculated by dividing a product's usage by its line hits. If the ASQ calculation is greater than the order point calculated, the order point is adjusted to the ASQ value as long as Threshold Minimum or 5HI is not greater. The minimum number of line hits set up in Replenishment Adjusters must also be met.</p> <p>Key <b>Y</b> to set the default value to use ASQ calculations.</p> <p>Key <b>N</b> if you do not want the default value set to use ASQ calculations.</p> <p><b>Note:</b> If the ASQ calculation is greater than the order point calculated, the order point is adjusted to the higher calculated value. If the minimum number of line hits defined on the Adjusters screen is not met, then this calculation will not be performed.</p> <p><b>Default Value:</b> Y</p> <p><b>Valid Values:</b> Y or N</p> <p>Recommended Value: Y</p> <p>(A 1) Required</p>

Field/Function Key	Description
Use 5HI	<p>This field determines the default value that will be used at the Replenishment level, if a value is not entered at that level. This field also is available at the Item Balance level, and you will be allowed to override this value in Item Balance Maintenance (MENU IAFILE), if needed.</p> <p>Use this field to select the default value for whether Five-high (5HI) calculations will be performed when determining the order point value.</p> <p>Instituting 5HI factors into the resulting order point will allow you to better manage products that experience exceptional usage, better manage customer buying habits on a product-by-product basis (since the order point is adjusted on products based on customer's actual buying habits) and improve customer service.</p> <p>The 5HI calculation reviews the highest sales for the number of usage months. If the minimum number of hits is met, the five highest sales quantities are used to calculate an average. Before averaging, the highest sales amount is removed. If this average is higher than the order point calculated, the order point is adjusted to the Five-high value as long as ASQ or Minimum Threshold are not higher.</p> <p>Key <b>Y</b> to set the default value to use 5HI calculations.</p> <p>Key <b>N</b> if you do not want the default value set to use 5HI calculations.</p> <p><b>Default Value:</b> Y</p> <p><b>Valid Values:</b> Y or N</p> <p>Recommended Value: Y</p> <p>(A 1) Required</p>
Default Rank Code	<p>The default rank you enter in this field will be used for an item before a rank can be assigned through Line Hit Rank Analysis (MENU AIREPT).</p> <p>Key the default rank (from A to Z) to be used for new AIBAL records.</p> <p><b>Default Value:</b> C</p> <p><b>Valid Values:</b> A - Z but cannot be greater than the number of ranks to be used in AIM ranking options. For example, if 5 ranks are to be used, then the valid values in this field would be A through E only.</p> <p>Recommended Value: C</p> <p>(A 1) Required</p>

Field/Function Key	Description
Usage Method	<p>This field determines the default value that will be used if no value for this option is located at a higher level.</p> <p>This field identifies the method that will be used to calculate the usage rate. The value entered in this field will be used as the default method for determining the average monthly usage (AMU) calculations (that is, an item's usage when calculating its AMU). You will have the option to select either the Backwards Usage Method or the Trending Usage Method.</p> <p>The Backwards Usage Method goes backward the number of Usage Months from before the Current Forecast Period, accumulating the usage as it goes backwards.</p> <p>The Trending Usage Method will go back one year (12 months or 13 periods depending on the set up of the company's fiscal year) and then accumulate from that month/period forward for the number of Usage Months. This type of usage method can also have a calculated Trend Percent applied to it. The starting period (when going back one year) can be adjusted to start earlier or later (by identifying a seasonal line up number of months) depending on how the season appears to be going, and the starting period can be advanced by the lead time.</p> <p>For further details and examples of each Usage Method type, refer to <a href="#">Usage</a> in <a href="#">CHAPTER 1: Advanced Inventory Management Overview</a></p> <p>Key <b>B</b> for calculating the usage rate going backwards.            Key <b>T</b> for calculating the usage rate based on trend. <b>Default Value:</b> B            Recommended Value: B            (A 1) Required</p>

Field/Function Key	Description
Usage Months	<p>This field determines the default value that will be used at the Replenishment level, if a value is not entered at that level. This field also is available at the Item Balance level and you will be allowed to override this value in Item Balance Maintenance (MENU IAFILE), if needed.</p> <p>Use this field to specify the default number of months that will be used to calculate the usage rate. This value will apply to each rank, and should not be greater than 12. The usage months are used to determine the average usage rate. It is also used to calculate an adjusted order point if the Average Sales Quantity (ASQ) or Five-High (5HI) adjusters are used.</p> <p>Key the number of months used to calculate the usage rate. For example, usage of 12 months backward would result in a review of the usage quantities for the last 12 months (assume they total to 100) and would then divide that total by the months usage of 12 to arrive at the value of 8.333333 (truncated to 8; not rounded).</p> <p><b>Default Value:</b> 6</p> <p><b>Valid Values:</b> should not exceed 12; a warning will appear if value exceeds 12</p> <p>Recommended Value: 6</p> <p>(N 2,0) Required</p>
Safety -Type	<p>This field determines the default value that will be used at the Replenishment level, if a value is not entered there.</p> <p>Use this field to specify the default safety allowance type and type value to be used to calculate days of safety when the calculation results in a number of days safety that falls between the at least/at most days safety for items.</p> <p>Key <b>P</b> to select 'percent' as the safety allowance type.</p> <p>Key <b>D</b> to select 'days' as the safety allowance type.</p> <p>In the field to the right of the safety allowance type, key the value of the safety allowance type.</p> <p><b>Default Value:</b> Type = P; Type Value = 50</p> <p><b>Valid Values:</b> P or D for the Type; The Type Value must be greater than zero for either P or D, and if the Type is D, the Type Value cannot exceed 365.</p> <p>Recommended Value: Type = P; Type Value = 50</p> <p>(A 1 / N 5,2) Required</p>

Field/Function Key	Description
Safety Assure at least equal to	<p>This field determines the default value that will be used at the Replenishment level, if a value is not entered there.</p> <p>Use this field to identify the default value of the least amount of days safety there can be for items. This field must be less than the Assure at most equal to field.</p> <p>Key the number of minimum days to be assured for safety. Leave blank if the <b>Safety Type</b> field is <b>D</b> for days.</p> <p><b>Default Value:</b> 7 days                      Recommended Value: 7 days                      (N 3,0) Required</p>
Safety -Assure at most equal to	<p>This field determines the default value that will be used at the Replenishment level, if a value is not entered there.</p> <p>Use this field to identify the default value of the most amount of days safety there can be for items. This field must be greater than the <b>Assure at least equal</b> to field.</p> <p>Key the amount of maximum days assurance that can be used for safety. Leave blank if the <b>Safety Type</b> field is <b>D</b> for days.</p> <p><b>Default Value:</b> 30 days                      Recommended Value: 30 days                      (N 3,0) Required</p>
Safety Rounding -Round up to whole number	<p>This field determines the default value that will be used at the Replenishment level, if a value is not entered there.</p> <p>Key <b>Y</b> if you want to round up to the whole number. Rounding will only occur if there is usage.</p> <p>Key <b>N</b> if you want the number to remain as is; rounding will not occur.</p> <p><b>Default Value:</b> Y  <b>Valid Values:</b> Y or N                      Recommended Value: Y                      (A 1) Required</p>

Field/Function Key	Description
Safety Rounding -Minimum Hits	<p>This field determines the default value that will be used at the Replenishment level, if a value is not entered there.</p> <p>Use this field to identify the default value of the minimum number of hits that must be met or exceeded for an item. Safety rounding will only be performed if the number of hits is greater than or equal to the number you key in this field.</p> <p>Key the minimum hits of safety rounding.</p> <p><b>Default Value:</b> 3</p> <p><b>Valid Values:</b> 0 through 999,999,999</p> <p>Recommended Value: 3</p> <p>(N 9,0) Required</p>
Safety Rounding -Cost if less than	<p>This field determines the default value that will be used at the Replenishment level, if a value is not entered there.</p> <p>Use this field to identify the default value of the cost that will be used to determine if safety rounding will occur.</p> <p>If rounding up to the next whole number (<b>Round up to whole number field = Y</b>), if the cost of that item is below the value you key in this field, then round the value up; otherwise, do not use this value.</p> <p>Key the cost if less than amount value to be used for safety rounding. The cost displays in the local trading currency.</p> <p>Recommended Value: 50.00</p> <p>(N 13,2) Required</p>
OP/OQ/LP/EOQ Rounding	<p>This field determines the default value that will be used at the Replenishment level, if a value is not entered there.</p> <p>Use this field to determine the default value for whether Order Point (OP), Order Quantity (OQ), Line Point (LP), and Economic Order Quantity (EOQ) rounding will be normally rounded, always rounded up or always rounded down.</p> <p>Key <b>N</b> or leave blank for normal rounding. The first decimal position is reviewed to see if it is greater than or equal to 5, and if so, the whole number is rounded up by 1.</p> <p>Key <b>U</b> to always round up to the next value. If the decimal value is greater than zero, round up the whole number by 1.</p> <p>Key <b>D</b> to always round down to the previous value. No rounding of the whole number is performed.</p> <p><b>Default Value:</b> N</p> <p><b>Valid Values:</b> N, U or D</p> <p>Recommended Value: N</p> <p>(A 1) Required</p>

Field/Function Key	Description
Seasonal Item Parameters Advance by Lead Time	<p>This field determines the default value that will be used if no value for this option is located at a higher level. This field also is available at the AIM Replenishment Options and Item Balance levels, where you will be allowed to override this value, if needed.</p> <p>This field can be used to adjust the season starting point (i.e., starting period for usage accumulation) to be later. This field is useful for those seasonal items that are usually purchased ahead of the season in which they are needed for. You can specify if you want to advance by the lead time that is needed for that item/vendor because you need to buy for the period of time that comes after the lead time.</p> <p>Key <b>Y</b> to have the season (starting period) adjusted by the lead time for the Advanced Inventory Management Balance File (<b>AIBAL</b>) record. The lead time of the item will be used to extend the starting period.</p> <p>Key <b>N</b> if you do not want the season adjusted by the lead time.</p> <p><b>Example:</b> If the current period is April and the item's usage months variable is 3, the AIM calculation programs would normally go back to April of last year and then accumulate the usage for April, May and June. However, if you select to use the Advance by Lead time option (i.e., key <b>Y</b> in this field) and the item/vendor has a 90-day lead time, the AIM calculation programs will go back to April of last year, but then advance to July and then accumulate the usage for July, August and September.</p> <p><b>Valid Values:</b> Y or N</p> <p>Recommended Value: Y</p> <p>(A 1) Required</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the Advanced Inventory Management System Options Screen without saving any additions/changes made to this screen.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management System Options - Additional Screen</a> will appear.</p>

## Advanced Inventory Management System Options - Additional Screen

```
ADVANCED INVENTORY MANAGEMENT SYSTEM OPTIONS - ADDITIONAL

Low Usage Order Point Adjuster:
  Use:                               Y
  Months to Use:                       12

F2=Low Usq OP Adj                               F12=Return
```

This screen appears after you press **ENTER** on the [Advanced Inventory Management System Options - Continued Screen](#).

Use this screen to determine if the Low Usage Order Point Adjuster will be used for all companies using AIM and, if so, how many months to use the adjuster (that is, how many number of months should be reviewed to collect the item's hit history). The default system values entered on this screen will be assigned to Advanced Inventory planned items for which specific variables have not been defined.

The Low Usage Order Point Adjuster is used to keep inventory on hand for an item that is experiencing low usage. With the Low Usage Order Point Adjuster, the order point will be adjusted to 1, if it was calculated to be zero (due to the low usage of the item). If used, the adjuster will trigger an inventory change value exception, and in this case, the exemption will be stored in the Low Usage Adjuster Exemption File (**AIEIVL**).

The use of the Low Usage Order Point Adjuster can be activated (or set to **Y**) through this screen, Replenishment Options Maintenance (MENU AIFILE) via the **F5=ADJUSTERS** function key, and Item Balance Maintenance (MENU IAFILE) via the **F2=ORDERING** function key.

In addition to the Low Usage Order Point Adjuster, there are three other order point adjusters (Threshold, ASQ, and 5-HI) that exist to allow the changing or adjusting of the normal calculated order point in AIM. If using one or more of the Threshold, ASQ, or 5-Hi methods, the system would calculate an item's order point not only using the normal calculation but also by using those selected adjuster methods. Once all the calculations were done, the system would then determine which

calculation resulted in the highest order point and would assign that highest order point to the item and would note which adjuster had been used.

**Advanced Inventory Management System Options-Additional Screen Fields & Function Keys**

Field/Function Key	Description
<p>Low Usage Order Point Adjuster: Use</p>	<p>This field determines the default value that will be used at the Replenishment level, if a value is not entered there.</p> <p>Use this field to select the default value for whether or not the Low Usage Order Point Adjuster will be used for AIM planned items.</p> <p>The Low Usage Order Point Adjuster is used to keep inventory on hand for an item that is experiencing low usage. With the Low Usage Order Point Adjuster, the order point will be adjusted to <b>1</b>, if it was calculated to be zero (due to the low usage of the item). If used, the adjuster will trigger an inventory change value exception, and in this case, the exemption will be stored in the Low Usage Adjuster Exemption File (<b>AIIEVL</b>).</p> <p>Key <b>Y</b> to set the default value to use the Low Usage Order Point Adjuster.</p> <p>Key <b>N</b> if you do not want the default value set to use the Low Usage Order Point Adjuster.</p> <p><b>Default Value:</b> N</p> <p><b>Valid Values:</b> Y or N</p> <p>Recommended Value: Y</p> <p>(A 1) Required</p>

---

Low Usage Order Point  
Adjuster:  
Months to Use

If the **Low Usage Order Point Adjuster: Use** field is **Y**, use this field to define how many months the Low Usage Order Point Adjuster will be used at the Replenishment level.

The number of months you key in this field determines the number of months that will be reviewed to collect the item's hit history (note that the Low Usage Order Point Adjuster will be reviewing the item's hits over this number of months, which can be different, if desired, than the number of months used for the straight 'usage' in the normal order point calculation which resulted in the zero order point).

Once you key this number of months in this field, you would set up specific parameters that must be met in order for this adjuster to be applied. These parameters consist of the following:

- During the specified number of months, for hits greater than x, with a cost less than x, the order point of **1** (fixed) will be assigned. Note that the cost referenced represents the value of the change between the normally calculated order point (**0**) and the newly assigned order point (**1**). At this time, the quantity change will always be 1, since the new order point will be a fixed value of **1**.
- This means that with the Low Usage Order Point Adjuster, if the normally calculated order point (using the normal usage months), is calculated as zero, and no Threshold/ASQ/5-Hi adjuster has been applied to adjust it higher, and if the Low Usage Order Point Adjuster is being used, then the system will go through an additional process to see if that zero should be changed to **1**. To do this, it will use the Low Usage Order Point Adjuster specified months to gather the number of applicable hits for the item; then, if the number of hits in those months is greater than the number of hits identified in one of the parameter entries created (i.e., in one of the for **Hits Greater Than x**, with a **Cost Less Than x** entries), and the replenishment cost of quantity **1** (currently the only order point quantity value allowed by Low Usage Order Point Adjuster) of the item is less than the cost identified in that same parameter entry, then the system will adjust the Order Point to 1. This way, even if the usage used in the normal order point calculation was not enough to arrive at an order point greater than zero, you can still get the order point bumped up to **1**, just based on the item having had the desired number of hits in the desired months, so long as the cost of making that change is acceptable.

**Note:** For an item supplied from a non-warehouse transfer vendor, this 'replenishment cost' value is compared to the item's vendor/item cost, converted to correct unit of measure, if a vendor/item exists; otherwise, it uses the Order Entry Options flag (MENU XAFILE) for the **Cost to be Used for GL** field (e.g.,

Field/Function Key	Description
	<p>std/avg/user) to select the cost from the item's Item Balance File (ITBAL), converted to the correct unit of measure. If the item is supplied by a warehouse transfer vendor, the Purchasing Options (MENU XAFILE) Warehouse Transfer price/cost options will be used.</p> <p>Multiple parameters can also be set up in this option, Replenishment Options Maintenance (MENU AIFILE) via the <b>F5=ADJUSTERS</b> function key, Item Balance Maintenance (MENU IAFILE) via the <b>F2=ORDERING</b> function key, and Interactive Forecasting (MENU AIMAIN/IMMAIN).</p> <p>Key <b>0</b> or leave blank if the <b>Low Usage OP Adjuster: Use</b> field is <b>N</b>.            Key a value <b>1</b> to <b>12</b> if the <b>Low Usage OP Adjuster: Use</b> field is <b>Y</b>.  <b>Default Value:</b> blank  <b>Valid Values:</b> blank; 0 to 12            Recommended Value: 3            (N 2,0) Required</p>
F2=Low Usg OP Adj	<p>Press <b>F2=LOW USG OP ADJ</b> to display the <a href="#">Low Usage Order Point Adjuster System 1 Screen</a>.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management System Options - Continued Screen</a>, without saving any additions/changes made to this screen.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management Options Maintenance Screen</a> will appear.</p>

## Low Usage Order Point Adjuster System 1 Screen

LOW USAGE ORDER POINT ADJUSTER SYSTEM LEVEL	
Currency:	US\$ US Dollars
Function:	.. (A,C,D)
Hits Greater Than:	.....
F10=List    F12=Return	

This screen appears after you press **F2=LOW USG OP ADJ** on the [Advanced Inventory Management System Options - Additional Screen](#). This screen can also be displayed after pressing **F2=LOW USG OP ADJ** from Replenishment Options Maintenance (MENU AIFILE) on the Adjusters Screen, Interactive Forecasting (MENU AIMAIN) on the Ordering Screen, or Item Balance Maintenance (MENU IAFILE) on the Ordering Screen.

Additional fields (WH, Item Number, Vendor, PLine, Item Class/Sub-Class) display on this screen depending on where this screen is accessed from. Any differences will be explained within this section.

Use this screen to add, change, or delete the **Hits Greater Than** number to be used for adjusting the order point.

### Low Usage Order Point Adjuster System 1 Screen Fields & Function Keys

Field/Function Key	Description
Currency	<p>If a warehouse has been entered, this field displays the currency of the company that controls the warehouse.</p> <p>If a warehouse has not been entered, the default local currency is displayed.</p> <p>Display</p>

Field/Function Key	Description
WH	<p>This field displays on this screen only when this screen is accessed from Replenishment Options Maintenance (MENU AIFILE), Interactive Forecasting (MENU AIMAIN), or Item Balance Maintenance (MENU IAFILE).</p> <p>This field displays the selected warehouse associated with the Low Usage Adjuster.</p> <p>Display</p>
Item Number	<p>This field displays on this screen only when this screen is accessed from Interactive Forecasting (MENU AIMAIN), or Item Balance Maintenance (MENU IAFILE).</p> <p>This field displays the item number associated with the Low Usage Adjuster.</p> <p>Display</p>
Vendor	<p>This field displays on this screen only when this screen is accessed from Replenishment Options Maintenance (MENU AIFILE).</p> <p>This field displays the vendor associated with the Low Usage Adjuster.</p> <p>Display</p>
PLine	<p>This field displays on this screen only when this screen is accessed from Replenishment Options Maintenance (MENU AIFILE).</p> <p>This field displays the purchasing line associated with the Low Usage Adjuster.</p> <p>Display</p>
Item Class	<p>This field displays on this screen only when this screen is accessed from Replenishment Options Maintenance (MENU AIFILE).</p> <p>This field displays the item class/sub-class, if any, associated with the Low Usage Adjuster.</p> <p>Display</p>
Function	<p>Key <b>A</b> to add a new Low Usage Order Point Adjuster.</p> <p>Key <b>C</b> to change an existing Low Usage Order Point Adjuster.</p> <p>Key <b>D</b> to delete an existing Low Usage Order Point Adjuster.</p> <p>(A 1) Required</p>

Field/Function Key	Description
Hits Greater Than	<p>Once a set number of months has been defined for which you are using the Low Usage Order Point Adjuster, use this field to set up a specific parameter that must be met in order for this adjuster to be applied.</p> <p>Key the number for which hits greater than this number will trigger the adjuster to potentially be applied.</p> <p>During the specified number of months for which the adjuster will be used and for the hits greater than the number you key in this field, with a cost less than x, the order point of <b>1</b> (fixed) will be assigned. Note that the cost referenced represents the value of the change between the normally calculated order point (<b>0</b>) and the newly assigned order point (<b>1</b>). At this time, the quantity change will always be <b>1</b>, since the new order point will be a fixed value of <b>1</b>.</p> <p>(N 9,0) Optional</p>
F10=List	<p>Press <b>F10=LIST</b> to display the <a href="#">Low Usage Order Point Adjuster List Screen</a>.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the previous screen, without saving any additions/changes made to this screen.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">Low Usage Order Point Adjuster System 2 Screen</a> will appear.</p>

## Low Usage Order Point Adjuster List Screen

LOW USAGE ORDER POINT ADJUSTER			
SYSTEM LEVEL			
Currency: US\$ US Dollars			
Sl	Hits Greater Than	Cost Less Than	Order Point
1	2	25.00	1
2	3	35.00	1
			Last
Selection: ...			
F12=Return			

This screen appears after you press **F10=LIST** on the [Low Usage Order Point Adjuster System 1 Screen](#).

Additional fields (WH, Item Number, Vendor, PLine, Item Class/Sub-Class) display on this screen depending on where this screen is accessed from (Replenishment Options Maintenance (MENU AIFILE), Interactive Forecasting (MENU AIMAIN), or Item Balance Maintenance (MENU IAFILE)). Any differences will be explained within this section.

Use this screen to review Low Usage Order Point Adjusters previously defined using the [Low Usage Order Point Adjuster System 1 Screen](#) and [Low Usage Order Point Adjuster System 2 Screen](#). You can select one for change or deletion, if necessary.

### Low Usage Order Point Adjuster List Screen Fields & Function Keys

Field/Function Key	Description
Currency	<p>If a warehouse has been entered, this field displays the currency of the company that controls the warehouse.</p> <p>If a warehouse has not been entered, the default local currency is displayed.</p> <p>Display</p>

Field/Function Key	Description
WH	<p>This field displays on this screen only when this screen is accessed from Replenishment Options Maintenance (MENU AIFILE), Interactive Forecasting (MENU AIMAIN), or Item Balance Maintenance (MENU IAFILE).</p> <p>This field displays the selected warehouse associated with the Low Usage Adjuster.</p> <p>Display</p>
Item Number	<p>This field displays on this screen only when this screen is accessed from Interactive Forecasting (MENU AIMAIN), or Item Balance Maintenance (MENU IAFILE).</p> <p>This field displays the item number associated with the Low Usage Adjuster.</p> <p>Display</p>
Vendor	<p>This field displays on this screen only when this screen is accessed from Replenishment Options Maintenance (MENU AIFILE).</p> <p>This field displays the vendor associated with the Low Usage Adjuster.</p> <p>Display</p>
PLine	<p>This field displays on this screen only when this screen is accessed from Replenishment Options Maintenance (MENU AIFILE).</p> <p>This field displays the purchasing line associated with the Low Usage Adjuster.</p> <p>Display</p>
Item Class	<p>This field displays on this screen only when this screen is accessed from Replenishment Options Maintenance (MENU AIFILE).</p> <p>This field displays the item class/sub-class, if any, associated with the Low Usage Adjuster.</p> <p>Display</p>
SI	<p>This is the reference number of the corresponding line. To select one of the displayed lines to change or delete, key this number in the Selection field.</p> <p>Display</p>
Hits Greater Than	<p>This field displays the number for which hits greater than this number will trigger the adjuster to potentially be applied.</p> <p>Display</p>
Cost Less Than	<p>This field displays the number for which costs less than this number will trigger the adjuster to be applied.</p> <p>Display</p>

Field/Function Key	Description
Order Point	<p>This field displays what the newly assigned order point will be, based on the <b>Hits Greater Than</b> field.</p> <p>Display</p>
Selection	<p>Use this field to select an existing adjuster parameter you want to change or delete.</p> <p>Key the reference number corresponding to the line you want to select, and press <b>ENTER</b>.</p> <p>(N 2,0) Optional</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the previous screen, without selecting a parameter record.</p>
Enter	<p>After entering a reference number in the <b>Selection</b> field, press <b>ENTER</b> to select the record and return to the <a href="#">Low Usage Order Point Adjuster System 1 Screen</a>.</p>

## Low Usage Order Point Adjuster System 2 Screen

LOW USAGE ORDER POINT ADJUSTER		Add
SYSTEM LEVEL		
Currency: US\$ US Dollars		
Hits Greater Than:	3	
Cost Less Than:	.....35.00..	
New Order Point:	1	
F12=Return		

This screen appears after you press **ENTER** on the [Low Usage Order Point Adjuster System 1 Screen](#).

Additional fields (WH, Item Number, Vendor, PLine, Item Class/Sub-Class) display on this screen depending on where this screen is accessed from (Replenishment Options Maintenance (MENU AIFILE), Interactive Forecasting (MENU AIMAIN), or Item Balance Maintenance (MENU IAFILE)). Any differences will be explained within this section.

Use this screen to add, change, or delete the **Cost Less Than** number to be used for adjusting the order point.

### Low Usage Order Point Adjuster System 2 Screen Fields & Function Keys

Field/Function Key	Description
Currency	<p>If a warehouse has been entered, this field displays the currency of the company that controls the warehouse.</p> <p>If a warehouse has not been entered, the default local currency is displayed.</p> <p>Display</p>

Field/Function Key	Description
WH	<p>This field displays on this screen only when this screen is accessed from Replenishment Options Maintenance (MENU AIFILE), Interactive Forecasting (MENU AIMAIN), or Item Balance Maintenance (MENU IAFILE).</p> <p>This field displays the selected warehouse associated with the Low Usage Adjuster.</p> <p>Display</p>
Item Number	<p>This field displays on this screen only when this screen is accessed from Interactive Forecasting (MENU AIMAIN), or Item Balance Maintenance (MENU IAFILE).</p> <p>This field displays the item number associated with the Low Usage Adjuster.</p> <p>Display</p>
Vendor	<p>This field displays on this screen only when this screen is accessed from Replenishment Options Maintenance (MENU AIFILE).</p> <p>This field displays the vendor associated with the Low Usage Adjuster.</p> <p>Display</p>
PLine	<p>This field displays on this screen only when this screen is accessed from Replenishment Options Maintenance (MENU AIFILE).</p> <p>This field displays the purchasing line associated with the Low Usage Adjuster.</p> <p>Display</p>
Item Class	<p>This field displays on this screen only when this screen is accessed from Replenishment Options Maintenance (MENU AIFILE).</p> <p>This field displays the item class/sub-class, if any, associated with the Low Usage Adjuster.</p> <p>Display</p>
Hits Greater Than	<p>This field displays the number for which hits greater than this number will trigger the adjuster to potentially be applied. This number was selected on the <a href="#">Low Usage Order Point Adjuster System 1 Screen</a>.</p> <p>Display</p>

Field/Function Key	Description
Cost Less Than	<p>Once a <b>Hits Greater Than</b> number has been selected, use this field to set up a specific parameter that must be met in order for this adjuster to be applied.</p> <p>Key the number for which costs less than this number will trigger the adjuster to be applied.</p> <p><b>Valid Values:</b> Cannot be a negative number (N 13,2) Optional</p>
New Order Point	<p>This field displays what the newly assigned order point will be, based on the <b>Hits Greater Than</b> field.</p> <p>During the specified number of months for which the adjuster will be used and for the hits greater than the number you selected, with a cost less than the value you key in this field, the order point of <b>1</b> (fixed) will be assigned. Note that the cost referenced represents the value of the change between the normally calculated order point (<b>0</b>) and the newly assigned order point (<b>1</b>). At this time, the quantity change will always be <b>1</b>, since the new order point will be a fixed value of <b>1</b>.</p> <p>Display</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the previous screen, without saving any additions/changes made to this screen.</p>
F24=Delete	<p>The <b>F24=DELETE</b> function key displays in the Delete mode only.</p> <p>Press <b>F24=DELETE</b> twice to delete the record displayed. The <a href="#">Low Usage Order Point Adjuster System 1 Screen</a> will appear, and the record will be deleted.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">Low Usage Order Point Adjuster System 1 Screen</a> will appear.</p>

## Advanced Inventory Management Company Options Screen

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ADVANCED INVENTORY MANAGEMENT COMPANY OPTIONS
Company: 1 A & C Office Supply

Vendor EOQ Parameters
Cost to Carry Percent: - .....
Cost to Purchase: ..... US$
Minimum Weeks Supply: .....
Maximum Weeks Supply: .....
Use EOQ in Suggested Order: ..

Transfer EOQ Parameters
Cost to Carry Percent: .....
Cost to Purchase: ..... US$
Minimum Weeks Supply: .....
Maximum Weeks Supply: .....
Use EOQ in Suggested Order: ..

Calendar Type: 5.

F12=Return
    
```

This screen appears after you enter a company number (01-99) on the [Advanced Inventory Management Options Maintenance Screen](#).

Use this screen to set up default values for the indicated company. If more than one company exists, different default values may be set up specific to each company.

You will be setting up both Vendor and Warehouse Transfer Economic Order Quantity (EOQ) parameters to be used for the default values for the indicated company.

The default values you enter here are the default values that will be used throughout Distribution A+. These default values can be overridden at higher levels (for the Warehouse, Vendor, and Purchasing Line through AIM EOQ Parameters (MENU AIFILE)), or at the item/warehouse level (through Item Balance Maintenance (MENU IAFILE)). The hierarchy is as follows, and all the levels will be used until all the EOQ parameters have been filled at whichever levels the values were found. Potentially, all five levels could be used for individual values, or as little as one level could be used for all values.

- 1 Item/WH
- 2 WH/Vendor/Pline
- 3 WH/Vendor
- 4 WH
- 5 Company

### Advanced Inventory Management Company Options Screen Fields and Function Keys

Field/Function Key	Description
Company	<p>This field displays the company number and description of the company you selected on the <a href="#">Advanced Inventory Management Options Maintenance Screen</a>.</p> <p>Display</p>
Vendor EOQ Parameters: Cost to Carry Percent	<p>The cost incurred to store/house an item in stock. This is a flat percent representing the average cost percentage, per unit, of holding an item in inventory (i.e., the inclusive cost associated with things such as warehouse space, insurance, special packaging/handling, refrigeration, etc.).</p> <p>A typical value ranges between 25 and 40 percent.</p> <p>Key the default carrying cost percent to be used for this company. This value will be used in the calculation of an item's Economic Order Quantity (EOQ).</p> <p><b>Valid Values:</b> Must be greater than zero</p> <p>Recommended Value: 24</p> <p>(N 4,2) Required</p>
Vendor EOQ Parameters: Cost to Purchase	<p>The cost incurred to purchase an item. This is a flat value representing the average cost, per unit, of processing an item on a purchase order (i.e., the inclusive cost associated with creating, reviewing, approving, printing, mailing, tracking and receiving the item on a purchase order).</p> <p>To help determine a value for this field, estimate the time required to create and process a purchase order and multiply it by the hourly costs of the people doing the work; add in the costs of any supplies used (forms, paper, etc.).</p> <p>Key the default PO processing cost for an item. The currency symbol of the company is displayed to the right of this field. This value will be used in the calculation of an item's Economic Order Quantity (EOQ).</p> <p><b>Valid Values:</b> Must be greater than zero</p> <p>Recommended Value: 4</p> <p>(N 6,2) Required</p>

Field/Function Key	Description
<p>Vendor EOQ Parameters: Minimum Weeks Supply</p>	<p>This is the minimum number of weeks' worth of inventory to be used for the EOQ, in case the EOQ calculates out to less. Distribution A+ takes this 'number of weeks' value, converts it to a number of days, multiplies it by a calculated average daily usage, to come up with a minimum EOQ that is desired. Distribution A+ then compares the calculated EOQ to this minimum value and adjusts, if necessary.</p> <p>Key the minimum number of weeks supply desired.</p> <p><b>Valid Values:</b> Greater than zero</p> <p>Recommended Value: 1</p> <p>(N 3,0) Required</p>
<p>Vendor EOQ Parameters: Maximum Weeks Supply</p>	<p>This is the maximum number of weeks' worth of inventory to be used for the EOQ, in case the EOQ calculates out to more. Distribution A+ takes this 'number of weeks' value, converts it to a number of days, multiplies it by a calculated average daily usage, to come up with a maximum EOQ that is desired. Distribution A+ then compares the calculated EOQ to this maximum value and adjusts, if necessary.</p> <p>Key the maximum number of weeks supply desired.</p> <p><b>Valid Values:</b> greater than the vendor minimum weeks supply value</p> <p>Recommended Value: 26</p> <p>(N 3,0) Required</p>
<p>Vendor EOQ Parameters: Use EOQ in Suggested Order</p>	<p>This field determines if the economic order quantity (EOQ) will be used when the Suggested Orders Report option (MENU POREPT) is run, and when using the search feature during Requisition Entry.</p> <p>Key <b>Y</b> to use the EOQ when ordering quantity is considered. The EOQ will be stored in the Advanced Inventory Balance File (<b>AIBAL</b>).</p> <p>Key <b>N</b> if you do not want the EOQ considered for ordering quantity and instead want the minimum/maximum values used during the calculation.</p> <p><b>Valid Values:</b> Y or N</p> <p>Recommended Value: Y</p> <p>(A 1) Required</p>

Field/Function Key	Description
Transfer EOQ Parameters: Cost to Carry Percent	<p>This field is the average cost percentage which is incurred for holding an item in inventory (values include cost of capital, warehouse space, insurance, handling, etc.).</p> <p>This percentage of inventory value is used to determine the cost for holding the inventory in stock.</p> <p>Key the default carrying cost percent to be used for this company. A typical value ranges between 25 and 40 percent.</p> <p><b>Valid Values:</b> Must be greater than zero</p> <p>Recommended Value: 24</p> <p>(N 2,0) Required</p>
Transfer EOQ Parameters: Cost to Purchase	<p>This is the average cost to create a purchase order (the total cost associated with creating, reviewing, approving, printing, mailing, tracking and receiving inventory from a purchase order).</p> <p>To calculate a value for this field, estimate the time required to create and process a purchase order and multiply it by the hourly costs of the people doing the work; add in the costs of any supplies used (forms, paper, etc.).</p> <p>Key the default PO processing cost for a single purchase order. The currency symbol of the company is displayed to the right of this field.</p> <p><b>Valid Values:</b> Must be greater than zero</p> <p>Recommended Value: 4</p> <p>(N 4,0) Required</p>
Transfer EOQ Parameters: Minimum Weeks Supply	<p>This is the minimum number of weeks' worth of inventory to be used for the EOQ, in case the EOQ calculates out to less. Distribution A+ takes this 'number of weeks' value, converts it to a number of days, multiplies it by a calculated average daily usage, to come up with a minimum EOQ that is desired. Distribution A+ then compares the calculated EOQ to this minimum value and adjusts, if necessary.</p> <p>Key the minimum number of weeks supply desired.</p> <p><b>Valid Values:</b> Must be greater than zero</p> <p>Recommended Value: 1</p> <p>(N 3,0) Required</p>

Field/Function Key	Description
Transfer EOQ Parameters: Maximum Weeks Supply	<p>This is the maximum number of weeks' worth of inventory to be used for the EOQ, in case the EOQ calculates out to more. Distribution A+ takes this 'number of weeks' value, converts it to a number of days, multiplies it by a calculated average daily usage, to come up with a maximum EOQ that is desired. Distribution A+ then compares the calculated EOQ to this maximum value and adjusts, if necessary.</p> <p>Key the maximum number of weeks supply desired.</p> <p><b>Valid Values:</b> greater than the transfer minimum weeks supply value</p> <p>Recommended Value: 13 (N 3,0) Required</p>
Transfer EOQ Parameters: Use EOQ in Suggested Order	<p>This field determines if the economic order quantity (EOQ) will be used when the Suggested Orders Report option (MENU POREPT) is run, and when using the search feature during Requisition Entry.</p> <p>Key <b>Y</b> to use the EOQ during suggested order processing, when ordering quantity is considered. The EOQ will be stored in the Advanced Inventory Balance File (<b>AIBAL</b>).</p> <p>Key <b>N</b> if you do not want the EOQ considered for ordering quantity and instead want the minimum/maximum values used during the calculation.</p> <p>Recommended Value: Y (A 1) Required</p>

Field/Function Key	Description
Calendar Type	<p>Key the appropriate calendar type reference number which defines the schedule used to close months in Sales Analysis. In most companies, each month has a different length.</p> <p>AIM analyzes past sales and predicts future sales based on the monthly calendar.</p> <p>AIM supports five types of calendars:</p> <ol style="list-style-type: none"> <li>1 <b>Calendar type 1</b> is for a 13 period fiscal year with each period being four weeks long. AIM assumes the first period begins on the first day on the first fiscal month [defined in the Sales Analysis Options Maintenance (MENU XAFILE)]. If 1 is keyed, the Sales Analysis option for number of fiscal periods must be 13.</li> <li>2 <b>Calendar type 2</b> assumes the first month of each quarter is five weeks and the other two are four weeks — 5-4-4 accounting periods.</li> <li>3 <b>Calendar type 3</b> assumes the first period in a quarter is four weeks, the second is five and the third is four — 4-5-4 accounting periods.</li> <li>4 <b>Calendar type 4</b> assumes the first period in a quarter is four weeks, the second is four and the third is five — 4-4-5 accounting periods.</li> <li>5 <b>Calendar type 5</b> assumes that the month ends on the last business day of each calendar month.</li> </ol> <p>The number of weeks per month are:</p> <p>Jan: 4.4; Feb: 4.0; Mar: 4.4; Apr: 4.3; May: 4.4; Jun: 4.3; Jul: 4.4; Aug: 4.4; Sep: 4.3; Oct: 4.4; Nov: 4.3; Dec: 4.4</p> <p><b>Valid Values:</b> 1 through 5 (N 1,0) Required</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Options Maintenance Screen</a> without saving any additions/changes made to this screen.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management Company Options - SS Report Default Options Screen</a> will appear.</p>

## Advanced Inventory Management Company Options - Report Defaults Screen

```

ADVANCED INVENTORY MANAGEMENT COMPANY OPTIONS - REPORT DEFAULTS
      Company: 1 A & C Office Supply
Inventory Planning
  Exception Report:  Smallest Min Bal Change to Print ($/%):  ....1  .1
                    Smallest Max Bal Change to Print ($/%):  ....1  .1
                    Maximum Number of Items to Print:         ....1
Usage Exception Report:  Smallest Variance to Print ($/%):    ....1  .1
                    Maximum Number of Items to Print:         ....1
Over-Stocked
  Inventory Report:  Smallest Over-Stock to Print ($/%):     ....1  .1
                    Maximum Number of Items to Print:         ....1
                                                                 F12=Return
    
```

This screen appears after you press **ENTER** from the [Advanced Inventory Management Company Options Screen](#).

AIM uses exception reporting techniques to provide buyers with a reasonable amount of inventory management information. This screen allows you to establish and change the values used to determine if something is an exception and should be reported. The defaults you enter here will display in the selection criteria for the respective report and may be accepted or overridden (for that run only) when selecting to print the report. These defaults (or any user overrides) are used to control the number of records that will print on the respective report.

Use this screen to set up report default values for the default company for the following reports used in the AIM module:

- Inventory Planning Exception Report
- Usage Exception Report
- Overstocked Inventory Report

For any other defined company, the Inventory Planning Exception Report defaults will not display. The Inventory Planning Exception Report defaults are for the default company only.

## Advanced Inventory Management Company Options - Report Defaults Screen Fields and Function Keys

Field/Function Key	Description
Inventory Planning Exception Report	<p>This report prints items with significant changes in minimum or maximum balances during Resetting AIM Variables (MENU AIMAST) and Running the AIM Monthly Update (MENU IMMAST). The responses you enter here, determine the values that will print on the report.</p> <p>Key the default dollar value (\$xxxxx) of the smallest minimum balance change to print on the report. Next to that value, key the default percent value (xx%) of the smallest minimum balance change to print on the report.</p> <p>Key the default dollar value of the smallest maximum balance change to print on the report. Next to that value, key the default percent value of the smallest maximum balance change to print on the report.</p> <p>Key the maximum number of items to print per warehouse and buyer (0- 99999). Set this field to zero to print all items that exceed any of these criteria.</p> <p>(N 5,0/N 2,0) Required-Default Company Only</p>
Usage Exception Report	<p>This report prints all items with sales quantities that significantly vary from the forecast quantity. The responses you enter here, determine the values that will print on the report.</p> <p>Key the default dollar value (\$xxxxx) of the smallest variance to print on the report. Next to that value, key the default percent value (xx%) of the smallest variance to print on the report.</p> <p>Key the maximum number of items to print (0-99999). Set this field to zero to print all items that exceed any of these criteria.</p> <p>(N 5,0/N 2,0) Required</p>
Over-Stocked Inventory Report	<p>This report prints all items that are significantly over maximum stocking levels. The responses you enter here, determine the values that will print on the report.</p> <p>Key the default dollar amount (\$xxxxx) of the smallest over-stocked value to print on the report. Next to that value, key the default percent (xx%) of the smallest over-stocked value to print on the report.</p> <p>Key the maximum number of items to print (0-99999). Set this field to zero to print all items that exceed any of these criteria.</p> <p>(N 5,0/N 2,0) Required</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Company Options Screen</a>, without saving any additions/changes made to this screen.</p>

Field/Function Key	Description
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management Options Maintenance Screen</a> will appear if you are working with any company other than the default.</p> <p>If you are working with the default company, the <a href="#">Advanced Inventory Management Company Options - SS Report Default Options Screen</a> will appear.</p>

---

## Advanced Inventory Management Company Options - SS Report Default Options Screen

```

ADVANCED INVENTORY MANAGEMENT COMPANY OPTIONS - SS REPORT DEFAULT OPTIONS

Company: 1 A & C Office Supply

Safety Stock Report: Safety Stock % of Minimum (1.0 - 99.9): 1.0
                    Override Safety Stock Quantity (Y,N,R): N
                    Average Months Usage: .....0
                    Permanent/Temporary Override: 1
                    0 = Override
                    1-9 = Number of Months

                    Replace Model with Low Usage Model: N (Y,N)
                    Low Usage Model ID? .....

F12=Return

```

This screen appears after you press **ENTER** from the [Advanced Inventory Management Company Options - Report Defaults Screen](#), if the company you are working with is the default company. This screen does not display for any other defined company.

Use this screen to identify default values to be presented when generating the Safety Stock Audit Report either through:

- Safety Stock Audit Report (MENU AIREPT)
- AIM Monthly Update (MENU AIMAST)
- When the report is selected to be generated during Day-End Processing (MENU XAMAST) on the Report Selection Global Level Screen

These values may be overridden through the Safety Stock Audit Report option (MENU AIREPT).

### Advanced Inventory Management Company Options - SS Report Default Options Screen Fields and Function Keys

Field/Function Key	Description
Safety Stock % of Minimum	Key a figure to define the default safety stock percentage of the previously defined minimum quantity for items. All items that have a safety stock quantity that is greater than or equal to this percentage of the minimum on-hand quantity will be selected for this report. (N 2,1) Required

Field/Function Key	Description
Override Safety Stock Quantity	<p>Key a default value to determine whether or not the safety stock quantity for the items in the warehouse will be overridden with the new safety stock quantity, minimum, and maximum values when the report is run.</p> <p>Key <b>Y</b> to override the safety stock quantities with the calculated values. The overrides will print on the report.</p> <p>Key <b>N</b> if you do not want to override the safety stock quantities. The report will print without overriding the safety stock quantity, minimum, or maximum values.</p> <p>Key <b>R</b> if you wish to review the new safety stock values but do not wish to actually override the original values.</p> <p>(A 1) Required</p>
Average Months Usage	<p>If you select to override the safety stock quantity, key a default value here to be used as a multiplier in determining the new safety stock quantity when the report is run. This value will be multiplied by the average usage to derive the new safety stock value.</p> <p>(N 3,1) Optional</p>
Permanent/Temporary Override	<p>Key a default value here to determine whether an override of the safety stock will be permanent or temporary.</p> <p>Key <b>O</b> to replace the safety stock maintenance code in the IM&amp;P Balance File with a permanent override.</p> <p>Key <b>1-9</b> to override the safety stock maintenance code for the number of months entered. At the end of this time, the field will be changed to “<b>A</b>” to indicate automatic maintenance of the value.</p> <p>(A 1) Required</p>
Replace Model with Low Usage Model	<p>Key a default value here to determine if the low usage model should be used to reforecast items that are equal to or greater than the safety stock percentage of minimum. Reforecasting with the low usage model may bring the safety stock percentage of minimum in the Item Balance File below the safety stock percentage of minimum entered in the report options.</p> <p>Key <b>Y</b> to reforecast the item with the low usage model. The IM&amp;P variables in the Item Balance File will be updated with the new values. Any items that are reforecast with the low usage model will appear on the Model Change Report, as explained in the Infor Distribution A+ Inventory Management &amp; Planning User Guide.</p> <p>Key <b>N</b> if you do not wish to replace the existing model in the Item Balance File and you do not wish to reforecast.</p> <p>(A 1) Required</p>

---

Field/Function Key	Description
Low Usage Model ID	If you selected to use the low usage Model ID, then key a default value here to identify which model to use. The ID used must be of an existing model that is set up through Planning Models Maintenance (MENU AIFILE/ MENU IMFILE). (A 1) Optional
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Company Options - Report Defaults Screen</a> , without saving any additions/changes made to this screen.
Enter	Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management Options Maintenance Screen</a> will appear.

---

## AIM Options Listing

This option is used to print the Advanced Inventory Management Options Listing.

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">AIM Options Listing</a>	Prints a list of the options defined through AIM Options Maintenance (MENU AIFILE).

---

# Advanced Inventory Management Options Listing

AI955	06/14/18	19.13.18	ADVANCED INVENTORY MANAGEMENT OPTIONS LISTING				AD/APDEMO	PAGE: 1
<b>SYSTEM OPTIONS:</b>								
Default Lead Time:		10						
Default Order Frequency:		14						
Default Model:		NCONM2						
Default Min Balance Maint Code:		A						
Default Max Balance Maint Code:		A						
Update Vendor/Item Lead Times:		Y						
Average Monthly Days:		30						
Trending Factor:		.5						
Default Months for Order Stats:		12						
Current Forecast Period:		1/16						
Buying Information View:		L						
AIM Live:		Y						
Use ASQ:		Y						
Use SHI:		Y						
Default Rank Code:		C						
Usage								
Method:		B						
Months:		6						
Safety								
Type:		P	50.00					
Assure at Least:		7						
Assure at Most:		30						
Safety Rounding								
Round up to Whole Number:		Y						
Minimum Hits:			3					
Cost if Less Than:				50.00 US\$				
OP/OQ/LP/EOQ Rounding:		N						
Seasonal Item Parameters								
Advance by Lead Time:		Y						
Low Usage Order Point Adjuster								
Use: Y								
Months to Use:		3						
LUA Hits Greater Than:		30						
LUA Cost Less Than:				10.00 US\$				
LUA Order Point:					1			
AI955	06/14/18	19.13.18	ADVANCED INVENTORY MANAGEMENT OPTIONS LISTING				AD/APDEMO	PAGE: 2
<b>COMPANY OPTIONS:</b>								
Company Number:	01	A & C Office Supply						
Vendor EOQ Parameters								
Cost to Carry Percent:		10.00						
Cost to Purchase:			11.00 US\$					
Minimum Weeks Supply:		1						
Maximum Weeks Supply:		1						
Use EOQ in Suggested Order:		Y						
Transfer EOQ Parameters								
Cost to Carry Percent:		3.00						
Cost to Purchase:			4.00 US\$					
Minimum Weeks Supply:		3						
Maximum Weeks Supply:		30						
Use EOQ in Suggested Order:		Y						
Calendar Type:		5						
Inventory Planning Exception Report								
Smallest Min Bal Change (\$/%) :			500 / 20					
Smallest Max Bal Change (\$/%) :			500 / 20					
Maximum Number of Items:			250					
Usage Exception Report								
Smallest Variance (\$/%) :			500 / 20					
Max Number of Items:			250					
Over-Stocked Inventory Report								
Smallest Over-Stock (\$/%) :			500 / 20					
Max Number of Items:			250					
Safety Stock Report								
Safety Stock % of Minimum:		50.0						
Override Safety Stock Quantity:		R						
Average Months Usage:		24.0						
Permanent/Temporary Override:		0						
Replace Model with Low Usage Model:		N						
Low Usage Model ID:								

This report prints after selecting option **19** - [AIM Options Listing](#) from MENU AIFILE. There is no entry specifications associated with this report; the listing is immediately sent to the default printer.

The contents of the Advanced Inventory System and Company options records are printed in company sequence. System options are printed before company options, and up to 99 company option records are printed for each company using AIM.

## Chapter 26 Maintaining AIM EOQ Parameters

Use the AIM EOQ Parameters Maintenance option to add, change, or delete Economic Order Quantity (EOQ) parameters. You can create AIM EOQ Parameter records through this option for a warehouse, warehouse/vendor, or warehouse/vendor/purchasing line. This information will then be used when the system calculates an EOQ for an applicable item and will determine if the calculated EOQ will be used in the suggested order process.

Maintaining the AIM EOQ Parameters through the Advanced Inventory Management File Maintenance Menu (MENU AIFILE) will update the AIM EOQ Parameters File (**AIEOQ**).

### AIM EOQ Parameters Maintenance

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">AIM EOQ Parameters Maintenance</a>	Use to add, change, or delete economic order quantity parameters.
<a href="#">AIM EOQ Parameter Maintenance Listing Screen</a>	Use to view a list of existing EOQ parameters defined through this menu option.
<a href="#">AIM EOQ Parameter Maintenance Definition Screen</a>	Use to add, change, or delete economic order quantity parameters for the warehouse, warehouse/vendor, or warehouse/vendor/purchasing line you specified on the AIM EOQ Parameter Maintenance Screen.

## AIM EOQ Parameter Maintenance Screen

AIM EOQ PARAMETER MAINTENANCE

Function:            ..            (A,C,D)

Warehouse?        ...

Vendor?            .....

Purchasing Line? .....

F3=Exit    F5=List

This screen appears after you select option **10** - [AIM EOQ Parameters Maintenance](#) from MENU AIFILE.

Use this screen to add, change, or delete economic order quantity parameters defined by:

- Warehouse Only
- Warehouse and Vendor
- Warehouse, Vendor, and Purchasing Line

**Note:** This is a hierarchy of groups, from the most general group to the most specific group.

### AIM EOQ Parameter Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Function	Key <b>A</b> to add new economic order quantity parameters. Key <b>C</b> to change existing economic order quantity parameters. Key <b>D</b> to delete existing economic order quantity parameters. (A 1) Required

Field/Function Key	Description
Warehouse	<p>Key the warehouse for which economic order quantity parameters are to be processed.</p> <p><b>Valid Values:</b> Any warehouse set up in Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (A 2) Required</p>
Vendor	<p>Use this field to define more specific groups of items that will be assigned economic order quantity parameters.</p> <p>Define economic order quantity parameters specific to items having this as their primary vendor.</p> <p><b>Valid Values:</b> Any vendor defined in Vendor Master Maintenance (MENU IAFILE) (A 6) Optional; Required if Purchasing Line is selected</p>
Purchasing Line	<p>Use this field to define more specific groups of items that will be assigned economic order quantity parameters.</p> <p>Define economic order quantity parameters specific to items having this as their purchasing line.</p> <p>Key the purchasing line for which economic order quantity parameters are to be processed.</p> <p><b>Valid Values:</b> A valid purchasing line defined through Purchasing Line Maintenance (MENU POFIL2) for the vendor, or vendor and warehouse entered. (A 10) Optional</p>
F3=Exit	<p>Press <b>F3=EXIT</b> to cancel this option and return to MENU AIFILE.</p>
F5=List	<p>Press <b>F5=LIST</b> to view a list of existing EOQ parameters defined through this menu option. The <a href="#">AIM EOQ Parameter Maintenance Listing Screen</a> will appear.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">AIM EOQ Parameter Maintenance Definition Screen</a> will appear.</p>

## AIM EOQ Parameter Maintenance Listing Screen

```

AIM EOQ PARAMETER MAINTENANCE LISTING

SI WH Vendor Vendor Name PLine PLine Description
1 1 100 SHARP INTERNATIONAL

Select: ... LIMITS Last
Warehouse? ... Vendor? ..... Purchasing Line? .....

F12=Return
    
```

This screen appears after you press **F5=LIST** on the [AIM EOQ Parameter Maintenance Screen](#).

Use this screen to view a list of existing EOQ parameters defined through this menu option. You will be able to limit the list by warehouse, vendor, and/or purchasing line, or you can select an existing record to change or delete.

### Note:

- This is a roll screen. **More...** appears at the bottom of a roll screen to indicate that more data is available for viewing. **Last** appears at the bottom of the last screen of data. To scroll through information on roll screens press:
- **\*PAGE DOWN** or **SHIFT-ROLL FWD** to display the next screen
- **\*PAGE UP** or **SHIFT-ROLL BACK** to display the previous screen.

### AIM EOQ Parameter Maintenance Listing Screen Fields and Function Keys

Field/Function Key	Description
SI	This is the reference number of the corresponding line. To select one of the displayed lines to change or delete, key this number in the <b>Select</b> field. Display

Field/Function Key	Description
WH	<p>This is the warehouse for which economic order quantity parameters have been defined through this menu option.</p> <p>Display</p>
Vendor/Vendor Name	<p>This is the number and name of the primary vendor, if any, for which economic order quantity parameters have been defined through this menu option.</p> <p>Display</p>
PLine/PLine Description	<p>This is the number and description of the purchasing line, if any, for which economic order quantity parameters have been defined through this menu option.</p> <p>Display</p>
Select	<p>Use this field to select an existing AIM EOQ parameter you want to change or delete.</p> <p>Key the reference number corresponding to the line you want to select, and press <b>ENTER</b>.</p> <p>(N 2,0) Optional</p>
Warehouse (limits)	<p>Use this field to limit the AIM EOQ parameters displayed on this screen to only those with this warehouse.</p> <p>Key a warehouse in this field and press <b>ENTER</b> to refresh the screen. Only those records that match the warehouse entered will be shown on this screen.</p> <p><b>Valid Values:</b> A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).</p> <p>(A 2) Optional</p>
Vendor (limits)	<p>Use this field to limit the AIM EOQ parameters displayed on this screen to only those with this vendor.</p> <p>Key a vendor in this field and press <b>ENTER</b> to refresh the screen. Only those records that match the vendor entered will be shown on this screen.</p> <p><b>Valid Values:</b> A vendor defined through Vendors Maintenance (MENU POFILE/MENU APFILE).</p> <p>(A 6) Optional</p>

Field/Function Key	Description
Purchasing Line (limits)	<p>Use this field to limit the AIM EOQ parameters displayed on this screen to only those with this purchasing line.</p> <p>Key a purchasing line in this field and press <b>ENTER</b> to refresh the screen. Only those records that match the purchasing line entered will be shown on this screen.</p> <p><b>Valid Values:</b> A valid purchasing line defined through Purchasing Line Maintenance (MENU POFIL2).</p> <p>(A 6) Optional</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the AIM EOQ Parameter Maintenance Screen, without selecting an AIM EOQ parameter record.</p>
Enter	<p>If you entered limit criteria, press <b>ENTER</b> to refresh the screen and show the information that matches your selections.</p> <p>If you entered a reference number in the <b>Select</b> field, press <b>ENTER</b> to select the record and return to the AIM EOQ Parameter Maintenance Screen.</p>

## AIM EOQ Parameter Maintenance Definition Screen

**AIM EOQ PARAMETER MAINTENANCE DEFINITION** **Add**

Warehouse: 2 Los Angeles, CA  
 Vendor: 200 K & M CORPORATION  
 Purchasing Line: 200-1 PAPER RELATED PRODUCTS

Vendor EOQ Parameters  
 Cost to Carry Percent: 20.00, Cost to Purchase: 30.00,, US\$  
 Minimum Weeks Supply: 3,, Maximum Weeks Supply: 52,,  
 Use EOQ in Suggested Order: Y,

Transfer EOQ Parameters  
 Cost to Carry Percent: 25.00, Cost to Purchase: 35.00,, US\$  
 Minimum Weeks Supply: 4,, Maximum Weeks Supply: 53,,  
 Use EOQ in Suggested Order: Y,

F12=Return

This screen appears after you press **ENTER** on the [AIM EOQ Parameter maintenance Screen](#).

Use this screen to add, change, or delete economic order quantity parameters for the warehouse, warehouse/vendor, or warehouse/vendor/purchasing line you specified on the [AIM EOQ Parameter Maintenance Screen](#).

### AIM EOQ Parameter Maintenance Definition Screen Fields and Function Keys

Field/Function Key	Description
Warehouse	This is the warehouse you selected on the <a href="#">AIM EOQ Parameter Maintenance Screen</a> for which economic order quantity parameters are being added, changed, or deleted. Display
Vendor	This is the vendor, if any, you selected on the <a href="#">AIM EOQ Parameter Maintenance Screen</a> for which economic order quantity parameters are being added, changed, or deleted. Display
Purchasing Line	This is the purchasing line, if any, you selected on the <a href="#">AIM EOQ Parameter Maintenance Screen</a> for which economic order quantity parameters are being added, changed, or deleted. Display

Field/Function Key	Description
Vendor EOQ Parameters: Cost to Carry Percent	<p>This field is the average cost percentage which is incurred for holding an item in inventory (values include cost of capital, warehouse space, insurance, handling, etc.). This percentage of inventory value is used to determine the cost for holding the inventory in stock.</p> <p>Key the default carrying cost percent to be used for this company. A typical value ranges between 25 and 40 percent.</p> <p>(N 4,2) Optional</p>
Vendor EOQ Parameters: Cost to Purchase	<p>The cost incurred to purchase an item. This is a flat value representing the average cost, per unit, of processing an item on a purchase order (i.e., the inclusive cost associated with creating, reviewing, approving, printing, mailing, tracking and receiving the item on a purchase order).</p> <p>To help determine a value for this field, estimate the time required to create and process a purchase order and multiply it by the hourly costs of the people doing the work; add in the costs of any supplies used (forms, paper, etc.).</p> <p>Key the default PO processing cost for an item. The currency symbol of the company is displayed to the right of this field. This value will be used in the calculation of an item's Economic Order Quantity (EOQ).</p> <p><b>Valid Values:</b> Must be greater than zero</p> <p>Recommended Value: 4</p> <p>(N 6,2) Required</p>
Vendor EOQ Parameters: Minimum Weeks Supply	<p>This is the adjusted value that will be used if the calculated economic order quantity (EOQ) falls below this value.</p> <p>Key the adjusted value.</p> <p>(N 3,0) Optional</p>
Vendor EOQ Parameters: Maximum Weeks Supply	<p>This is the adjusted value that will be used if the calculated economic order quantity (EOQ) falls above this value.</p> <p>Key the adjusted value.</p> <p>(N 3,0) Optional</p>

Field/Function Key	Description
<p>Vendor EOQ Parameters: Use EOQ in Suggested Order</p>	<p>This field determines if the economic order quantity (EOQ) will be used when the Suggested Orders Report option (MENU POREPT) is run, and when using the search feature during Requisition Entry.</p> <p>Key <b>Y</b> to use the EOQ during suggested order processing, when ordering quantity is considered. The EOQ will be stored in the Item Balance File (<b>ITBAL</b>).</p> <p>Key <b>N</b> if you do not want the EOQ considered for ordering quantity and instead want the minimum/maximum values used during the calculation.</p> <p>Leave blank to ignore this option.</p> <p><b>Valid Values:</b> Y, N or blank (A 1) Optional</p>
<p>Transfer EOQ Parameters: Cost to Carry Percent</p>	<p>This field is the average cost percentage which is incurred for holding an item in inventory (values include cost of capital, warehouse space, insurance, handling, etc.). This percentage of inventory value is used to determine the cost for holding the inventory in stock.</p> <p>Key the default carrying cost percent to be used for this company. A typical value ranges between 25 and 40 percent.</p> <p>(N 2,0) Optional</p>
<p>Transfer EOQ Parameters: Cost to Purchase</p>	<p>This is the average cost to create a purchase order (the total cost associated with creating, reviewing, approving, printing, mailing, tracking and receiving inventory from a purchase order).</p> <p>To calculate a value for this field, estimate the time required to create and process a purchase order and multiply it by the hourly costs of the people doing the work; add in the costs of any supplies used (forms, paper, etc.).</p> <p>Key the default PO processing cost for a single purchase order. The currency symbol of the company is displayed to the right of this field.</p> <p>(N 4,0) Optional</p>
<p>Transfer EOQ Parameters: Minimum Weeks Supply</p>	<p>This is the adjusted value that will be used if the calculated economic order quantity (EOQ) falls below this value.</p> <p>Key the adjusted value.</p> <p>(N 3,0) Optional</p>
<p>Transfer EOQ Parameters: Maximum Weeks Supply</p>	<p>This is the adjusted value that will be used if the calculated economic order quantity (EOQ) falls above this value.</p> <p>Key the adjusted value.</p> <p>(N 3,0) Optional</p>

Field/Function Key	Description
Transfer EOQ Parameters: Use EOQ in Suggested Order	<p>This field determines if the economic order quantity (EOQ) will be used when the Suggested Orders Report option (MENU POREPT) is run, and when using the search feature during Requisition Entry.</p> <p>Key <b>Y</b> to use the EOQ during suggested order processing, when ordering quantity is considered. The EOQ will be stored in the Item Balance File (<b>ITBAL</b>).</p> <p>Key <b>N</b> if you do not want the EOQ considered for ordering quantity and instead want the minimum/maximum values used during the calculation.</p> <p>Leave blank to ignore this option.</p> <p><b>Valid Values:</b> Y, N or blank</p> <p>(A 1) Optional</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">AIM EOQ Parameter Maintenance Screen</a>, without saving any additions/changes made to this screen.</p>
F24=Delete	<p>The <b>F24=DELETE</b> function key displays in the Delete mode only. Press <b>F24=DELETE</b> to delete the record displayed. The <a href="#">AIM EOQ Parameter Maintenance Screen</a> will appear, and the record will be deleted.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">AIM EOQ Parameter Maintenance Screen</a> will appear.</p>

## AIM EOQ Parameters Listing

This option is used to print the AIM EOQ Parameters Listing. This listing shows the AIM EOQ parameters defined through AIM EOQ Parameters Maintenance (MENU AIFILE).

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">AIM EOQ Parameters Listing Screen</a>	Use to specify the limiting criteria for the listing.
<a href="#">AIM EOQ Parameters Listing</a>	Prints a list of AIM EOQ parameters in sequence by warehouse, vendor, and purchasing line, that match the limiting criteria entered.

---

## AIM EOQ Parameters Listing Screen

AIM EOQ PARAMETERS LISTING

Warehouse?      - ,              To?    ...

Vendor:            .....              To:    .....

Purchasing Line? .....              To?    .....

F3=Cancel

This screen appears after you select option **20** - [AIM EOQ Parameters Listing](#) from MENU AIFILE.

Use this screen to select the criteria which will limit the AIM EOQ parameters to print on the AIM EOQ Parameters Listing. Only the AIM EOQ parameters that match the criteria entered in these fields will print on the listing.

Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

### AIM EOQ Parameters Listing Screen Fields and Function Keys

Field/Function Key	Description
Warehouse	<p>Use this field to enter the warehouse or range of warehouses for which AIM EOQ parameters will print on the <a href="#">AIM EOQ Parameters Listing</a>.</p> <p><b>Valid Values:</b> Any warehouse set up in Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (2 @ A 2) Optional</p>
Vendor	<p>Use this field to enter the vendor or range of vendors to include in the listing.</p> <p><b>Valid Values:</b> A vendor defined through Vendors Maintenance (MENU POFILE/MENU APFILE). (2 @ A 6) Optional</p>

Field/Function Key	Description
Purchasing Line	Use this field to enter the purchasing line or range of purchasing lines to include in the listing. <b>Valid Values:</b> A valid purchasing line defined through Purchasing Line Maintenance (MENU POFIL2). (2 @ A 10) Optional
F3=Cancel	Press <b>F3=CANCEL</b> to cancel this option and return to MENU AIFILE.
Enter	Press <b>ENTER</b> to confirm your selections and proceed to the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

## AIM EOQ Parameters Listing

AI865 07/25/13 16.21.41			AIM EOQ PARAMETERS LISTING			AN/APDEMO	PAGE: 1
WH	Vendor	PLine	All Vendors	All Warehouses	Vendor	All Purchasing Lines	Transfer
2	200	200-1	Cost to Carry Percent:	20.00		25.00	
			Cost to Purchase:	30.00 US\$		35.00 US\$	
			Minimum Weeks Supply:	3		4	
			Maximum Weeks Supply:	52		53	
			Use EQQ in Suggested Order:	Y		Y	
3	200	200-2	Cost to Carry Percent:				
			Cost to Purchase:		US\$		US\$
			Minimum Weeks Supply:				
			Maximum Weeks Supply:				
			Use EQQ in Suggested Order:				
1	100		Cost to Carry Percent:				
			Cost to Purchase:		US\$		US\$
			Minimum Weeks Supply:				
			Maximum Weeks Supply:				
			Use EQQ in Suggested Order:				
C2			Cost to Carry Percent:				
			Cost to Purchase:		US\$		US\$
			Minimum Weeks Supply:				
			Maximum Weeks Supply:				
			Use EQQ in Suggested Order:				

This listing prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

The AIM EOQ parameters defined through AIM EOQ Parameters Maintenance (MENU AIFILE) are printed in sequence by warehouse, vendor, and purchasing line. Only the parameters that match the limiting criteria entered on the [AIM EOQ Parameters Listing Screen](#) are printed.

**Note:** The message “\* Data may have been omitted due to security considerations \*” will print when the user that generated this listing is not authorized to all the warehouse selected data, as determined through Authority Profile Maintenance (MENU XASCTY).

## Chapter 27 Printing the AIM Balance Listing

Use the AIM Balance Listing option on the Advanced Inventory Management File Maintenance Menu (MENU AIFILE) to print the [AIM Balance File Listing](#). This listing prints the AIM parameters in the Advanced Inventory Balance File (**AIBAL**), which are defined through Item Balance Maintenance (MENU IAFILE) on the Advanced Inventory Management Information and Ordering screens. Information from the AIM EOQ Parameters File (**AIEOQ**) is also included.

Selection criteria can be entered to limit the AIM Balance information to print on the listing. You can limit the listing by buyer, vendor, warehouse, item class/sub-class, and item number. The listing is sequenced by item number and warehouse.

### AIM Balance Listing

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">AIM Balance File Listing Screen</a>	Use to specify limiting criteria for the listing.
<a href="#">AIM Balance File Listing</a>	Prints the information in the Advanced Inventory Balance File ( <b>AIBAL</b> ) and AIM EOQ Parameters File ( <b>AIEOQ</b> ) that matches the limiting criteria.

## AIM Balance File Listing Screen

AIM BALANCE FILE LISTING

Selection

Buyer?                    - ..                    To?                    ....

Vendor:                    .....                    To:                    .....

Warehouse?                ...                    To?                    ...

Item Class?                ... / ...                To?                    ... / ...

Item Number: .....                    To: .....

F3=Cancel

This screen appears after you select option **11** - [AIM Balance Listing](#) from MENU AIFILE. Use this screen to select the criteria to limit the AIM information to print on the [AIM Balance File Listing](#). Only the information that matches the criteria entered in these fields will print.

Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

### AIM Balance File Listing Screen Fields and Function Keys

Field/Function Key	Description
Buyer	Key the buyer or range of buyers who are responsible for the items to print on the listing. <b>Valid Values:</b> A buyer defined through Buyers Maintenance (MENU POFILE). (2 @ A 3) Optional
Vendor	Key the vendor or range of vendors to print on the listing. <b>Valid Values:</b> A vendor defined through Vendors Maintenance (MENU POFILE/MENU APFILE). (2 @ A 6) Optional

Field/Function Key	Description
Warehouse	<p>Key the warehouse or range of warehouses for which AIM information will print on the listing.</p> <p><b>Valid Values:</b> A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).</p> <p>(2 @ A 2) Optional</p>
Item Class	<p>Key the item class/sub-class or range of item classes/sub-classes of the items to print on the listing. If the sub-class is left blank, all sub-classes within the item class indicated will print.</p> <p><b>Valid Values:</b> Item classes are defined through Item Class/Sub Class Maintenance (MENU IAFILE) and are assigned to items through Item Master Maintenance (MENU IAFILE).</p> <p>(2 @ A 2 / A 2) Optional</p>
Item Number	<p>Key the item number or range of item numbers for which Advanced Inventory Balance File (AIBAL) information will print on the listing.</p> <p><b>Valid Values:</b> A valid item number defined through Item Master Maintenance (MENU IAFILE).</p> <p>(2 @ A 27) Optional</p>
F3=Cancel	<p>Press <b>F3=CANCEL</b> to cancel this option and return to MENU AIFILE.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections and proceed to the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.</p>

# AIM Balance File Listing

AI870 11/18/15 16.15.22		AIM BALANCE FILE LISTING			AZ/APDEMO	PAGE: 1
All Buyers	All Vendors	W/H From: 1	All Classes	All Items		
		To: 1				
Buyer: 101	Vendor: 1400	W/H: 1	Itcl: 80/3	Item: A585	Desc: File Folders - Manilla	Model: NCONM2
Service Level:	99					
Lead Time:	7	Lead Time Maintenance Code:	A	Lead Time Source Code:	9	
Order Frequency:	7	Order Frequency Maintenance Code:	A	Order Frequency Source Code:	7	
Safety Stock:		Safety Stock Maintenance Code:	A	Safety Stock Source Code:	A	
Safety Stock Code:	D	Safety Stock Code Value:	D			
Order Point:		Order Point Maintenance Code:	A	Order Point Source Code:		
OP Adjuster Reason:		Calculated Order Point:		Order Quantity		
Order Quantity Maintenance Code:	A					
Line Point Maintenance Code:	A					
Standard Deviation:		Average Monthly Usage:		Line Point:		
WH Line Hit Rank:	C	WH Line Hit Rank Maintenance Code:	A	Calculated Line Point:		
Average Lead Time Date:	7/20/15	OPTR:		Economic Order Qty:		
OP Threshold Expire Date:	0/00/00	Use ASQ:		Average Lead Time:		
ASQ Max Val Diff:	US\$	Use 5Hi:		OP Threshold Minimum:		
5Hi Max Val Diff:	US\$	Vendor Cost to Purchase:	US\$	ASQ Use Maximum Value Difference:	N	
Vendor Minimum Weeks Supply:		Vendor Maximum Weeks Supply:		5Hi Use Maximum Value Difference:	N	
Transf Cost to Purchase:	US\$	Transf Cost to Carry:		Vendor Cost to Carry:		
Transf Maximum Weeks Supply:		Transf Use EQO in Suggested Order:		Vendor Use EQO in Suggested Order:		
Trend End Date:	0/00/00	Trend Minimum Percent:		Transf Minimum Weeks Supply:		
Trend Min Hits Last Year:		Trend Min Hits This Year:		This Month Forecast:		
Line-Up End Date:	0/00/00	Advance by Lead Time:		Trend Maximum Percent:		
5-Hi Expires Date:	0/00/00	Threshold Entered Date:	0/00/00	Line-Up Months:		
Usage Months M/C:	A	Usage Method:		ASQ Expires Date:	0/00/00	
Use Low Usage OP Adjuster:		Low Usage OP Adj Months:		Usage Months:	5	
				Low Usage OP Adj Expires:	0/00/00	

This listing prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

This listing prints the information in the Advanced Inventory Balance File (**AIBAL**) and AIM EOQ Parameters File (**AIEOQ**) that matches the limiting criteria on the [AIM Balance File Listing Screen](#). The AIM fields in the Advanced Inventory Balance File (**AIBAL**) are defined through Item Balance Maintenance (MENU IAFILE) on the Advanced Inventory Management Information screens. Information is printed in item number and warehouse sequence.

### AIM Balance File Listing

Report/Listing Fields	Description
Headings	<p>Program names appear on the upper left corner of the listing, followed by run date and time, report title, workstation ID, User ID, and page number.</p> <p>A summary of the selection criteria prints in the center of the headings area, followed by the individual field headings.</p>
Buyer	<p>The buyer responsible for purchasing the item, as selected on the <a href="#">AIM Balance File Listing Screen</a>. If all buyers were selected, All Buyers displays on the top line of the listing and this field is blank.</p>

Report/Listing Fields	Description
Vendor	The primary vendor from whom this item is purchased, as selected on the <a href="#">AIM Balance File Listing Screen</a> . If all vendors were selected, All Vendors displays on the top line of the listing and this field is blank.
W/H	The warehouse associated with the item for which AIM information is printed, as selected on the <a href="#">AIM Balance File Listing Screen</a> . If all warehouses were selected, All W/Hs displays on the top line of the listing and this field is blank.
Desc	The description of the item.
Model	The Model ID of the planning model that is used for forecasting sales and stocking levels, for this planned item/warehouse, if applicable.
Service Level	The target percentage of order quantities that can be filled from stock.
Lead Time	The number of days a vendor requires to deliver items after placing an order.
Lead Time Maintenance Code	<p>One of three codes is displayed with regard to the <b>Lead Time</b> field:</p> <ul style="list-style-type: none"> <li>• <b>A</b> (Automatic) displays if the <b>Lead Time</b> field is maintained automatically and is protected.</li> <li>• <b>O</b> (Override) displays if the <b>Lead Time</b> field has overridden by a value keyed and may be maintained. This field will not be changed when Reset AIM Variables (MENU AIMAST) is run.</li> <li>• <b>1-9</b> displays representing the number of months the <b>Lead Time</b> field is to be overridden. At the end of that time, this field will automatically be changed to <b>A</b>. At the end of that time, this field will automatically be changed to <b>A</b> by AIM Monthly Update (MENU AIMAST).</li> </ul>

Report/Listing Fields	Description
Lead Time Source Code	<p>The lead time which is most specific to this item. The value that displays is the default selected for the indicated item.</p> <p>Source Code values are:</p> <ul style="list-style-type: none"> <li>• 0=Override</li> <li>• 8=Historically Set Lead Time (IM&amp;P)</li> <li>• 9=Average Lead Time (AIM)</li> <li>• A=Safety Stock Adjuster</li> <li>• C=WH, Vendor, Pline, Class/Sub</li> <li>• D=WH, Vendor, Pline, Class</li> <li>• E=WH, Vendor, Pline</li> <li>• 1=WH, Vendor, Class/Sub</li> <li>• 2=WH, Vendor, Class</li> <li>• 3=WH, Vendor</li> <li>• 4=WH, Class/Sub</li> <li>• 5=WH, Class</li> <li>• 6=WH</li> <li>• 7=System default</li> </ul>
Ordering Frequency	<p>The number of days between placing orders for this item.</p>
Ordering Frequency Maintenance Code	<p>One of three codes is displayed with regard to the <b>Order Frequency</b> field:</p> <ul style="list-style-type: none"> <li>• <b>A</b> (Automatic) displays if the <b>Order Frequency</b> field is maintained automatically and is protected.</li> <li>• <b>O</b> (Override) displays if the <b>Order Frequency</b> field has been overridden by a value keyed and may be maintained. This field will not be changed when Reset AIM Variables (MENU AIMAST) is run.</li> <li>• <b>1-9</b> displays representing the number of months the <b>Order Frequency</b> field is to be overridden. At the end of that time, this field will automatically be changed to <b>A</b>. At the end of that time, this field will automatically be changed to <b>A</b> by AIM Monthly Update (MENU AIMAST).</li> </ul>

Report/Listing Fields	Description
Ordering Frequency Source Code	<p>The ordering frequency which is most specific to this item. The value that displays is the default selected for the indicated item.</p> <p>Source Code values are:</p> <ul style="list-style-type: none"> <li>• 0=Override</li> <li>• C=WH, Vendor, Pline, Class/Sub</li> <li>• D=WH, Vendor, Pline, Class</li> <li>• E=WH, Vendor, Pline</li> <li>• 1=WH, Vendor, Class/Sub</li> <li>• 2=WH, Vendor, Class</li> <li>• 3=WH, Vendor</li> <li>• 4=WH, Class/Sub</li> <li>• 5=WH, Class</li> <li>• 6=WH</li> <li>• 7=System default</li> </ul>
Safety Stock	<p>This quantity reflects the additional stock stored in inventory to compensate for variations in customer demand and vendor lead times.</p>
Safety Stock Maintenance Code	<p>This code reflects whether or not the <b>Safety Stock Quantity</b> field is protected.</p> <p><b>A</b> (Automatic) displays if the <b>Safety Stock Quantity</b> field is maintained automatically and is protected.</p> <p><b>O</b> (Override) displays if the <b>Safety Stock Quantity</b> field has been overridden by a value keyed and may be maintained. This field will not be changed when the AIM Monthly Update (MENU AIMAST) is run.</p> <p><b>1-9</b> displays representing the number of months the <b>Order Frequency</b> field is to be overridden. At the end of that time, this field will automatically be changed to <b>A</b> by AIM Monthly Update (MENU AIMAST).</p>

Report/Listing Fields	Description
Safety Stock Source Code	<p>The safety stock which is most specific to this item. The value that displays is the default selected for the indicated item. Source Code values are:</p> <ul style="list-style-type: none"> <li>• 0=Override</li> <li>• S=System calculated</li> <li>• C=WH, Vendor, Pline, Class/Sub</li> <li>• D=WH, Vendor, Pline, Class</li> <li>• E=WH, Vendor, Pline</li> <li>• 1=WH, Vendor, Class/Sub</li> <li>• 2=WH, Vendor, Class</li> <li>• 3=WH, Vendor</li> <li>• 4=WH, Class/Sub</li> <li>• 5=WH, Class</li> <li>• 6=WH</li> <li>• 7=System default</li> </ul>
Safety Stock Code	<p>The safety stock or allowance code (safety stock ensures that additional stock is stored in inventory to compensate for variations in customer demand and vendor lead times). This value determines the format value of the <b>Safety Stock Code Value</b> field.</p> <p><b>Q</b> = Quantity in the <b>Safety Stock Code Value</b> field.  <b>D</b> = Days in the <b>Safety Stock Code Value</b> field.  <b>P</b> = Percentage in the <b>Safety Stock Code Value</b> field.</p>
Safety Stock Code Value	<p>The value of the safety stock, based on the safety stock code entered in the <b>Safety Stock Code</b> field.</p> <p>This value is either a safety stock quantity, number of days, or percentage, based on the safety stock code.</p> <p>For Percentage:</p> <p><b>Safety Quantity = [Safety Allowance / {Average Monthly Usage x (Average Lead Time / Average Monthly Days)}] x 100</b></p> <p>For Days:</p> <p><b>Safety Quantity = Safety Allowance Days * (Average Monthly Usage / Average Monthly Days)</b></p>
Order Point	<p>The order point for an item. When the net quantity available falls below the Order Point/Min balance, the item should be placed on the next purchase order.</p>

Report/Listing Fields	Description
Order Point Maintenance Code	<p>This code reflects whether or not the <b>Minimum Balance</b> field is protected.</p> <p><b>A</b> (Automatic) displays if the <b>Minimum Balance</b> field is maintained automatically and is protected.</p> <p><b>O</b> (Override) displays if the <b>Minimum Balance</b> field is overridden by a value keyed and may be maintained.</p> <p><b>1-9</b> displays representing the number of months the <b>Order Frequency</b> field is to be overridden. At the end of that time, this field will automatically be changed to <b>A</b> by AIM Monthly Update (MENU AIMAST).</p>
Order Point Source Code	<p>The order point which is most specific to this item. The value that displays is the default selected for the indicated item. Source Code values are:</p> <ul style="list-style-type: none"> <li>• 0=Override</li> <li>• B=Adjuster</li> </ul> <p>The order point source code will indicate a <b>B</b> when it has been replaced by the Order Point Adjustment.</p>
OP Adjuster Reason	<p>The reason the <b>Order Point/Min</b> has been changed.</p> <p>Threshold displays if the Order Point/Min has been adjusted by threshold.</p> <p><b>ASQ</b> displays if the Order Point/Min has been adjusted by average sales quantity.</p> <p><b>5-Hi</b> displays if the Order Point/Min has been adjusted by 5-Hi.</p> <p><b>LUA</b> displays if the Order Point/Min has been adjusted by Low Usage Order Point.</p>
Calculated Order Point	<p>The calculated order point (Raw Order Point/Min). This is the value the system calculated before the <b>Order Point Adjuster</b> field was considered, if applicable.</p> <p>This value should be equal to the order point, if no order point adjuster was applied.</p>
Order Quantity	<p>The value of the order quantity for the item.</p>

Report/Listing Fields	Description
Order Quantity Maintenance Code	<p>This code reflects whether or not the <b>Order Quantity</b> field is protected.</p> <p><b>A</b> (Automatic) displays if the <b>Order Quantity</b> field is maintained automatically and is protected.</p> <p><b>O</b> (Override) displays if the <b>Order Quantity</b> field is overridden by a value keyed and may be maintained.</p> <p><b>1-9</b> displays representing the number of months the <b>Order Frequency</b> field is to be overridden. At the end of that time, this field will automatically be changed to <b>A</b> by AIM Monthly Update (MENU AIMAST).</p>
Order Quantity Source Code	Future use only.
Line Point	The highest desired inventory level for an item.
Line Point Maintenance Code	<p>One of two codes is displayed with regard to the Maximum Balance field:</p> <ul style="list-style-type: none"> <li>• <b>A</b> (Automatic) displays if the <b>Maximum Balance</b> field is maintained automatically and is protected.</li> <li>• <b>O</b> (Override) displays if the <b>Maximum Balance</b> field is to be overridden by a value keyed and may be maintained.</li> <li>• <b>1-9</b> displays representing the number of months the <b>Order Frequency</b> field is to be overridden. At the end of that time, this field will automatically be changed to <b>A</b> by AIM Monthly Update (MENU AIMAST).</li> </ul>
Line Point Source Code	Future use only.
Calculated Line Point	<p>The calculated line point (Raw Line Point/Max), which is the value the system calculated before the <b>Order Point Adjuster</b> field was considered, if applicable.</p> <p>This value should be equal to the line point, if no order point adjuster was applied.</p>
Standard Deviation	<p>The standard deviation for this item as determined by the forecast. Standard deviation is a measure of the variability of the item's demand history. An item with stable sales will have a standard deviation lower than that of an item with erratic sales.</p>
Average Monthly Usage	The average month's usage (AMU) of an item.
Economic Order Qty	The suggested optimum reorder quantity, calculated using the traditional Economic Order Quantity (EOQ).

Report/Listing Fields	Description
WH Line Hit Rank	<p>The warehouse's Line Hit Rank Code (A, B, C, D, etc.) of the item in the Advanced Inventory Balance File (<b>AIBAL</b>).</p> <p>This code will be used in a variety of different calculations (Ranking, ASQ, 5-Hi, etc.) and can be set at the warehouse, vendor, purchasing line, item class/sub-class level.</p>
WH Line Hit Rank Maintenance Code	<p>One of two codes is displayed with regard to the Line Hit field:</p> <ul style="list-style-type: none"> <li>• <b>A</b> (Automatic) displays if the <b>Line Hit</b> field is maintained automatically and is protected.</li> <li>• <b>O</b> (Override) displays if the <b>Line Hit</b> field is to be overridden by a value keyed and may be maintained.</li> </ul>
Average Lead Time	<p>The number of days required for you to receive an item from the time that its purchase order was issued. This field displays the average lead time, calculated from the purchase order receipt history.</p>
Average Lead Time Date	<p>The date the lead time average lead time was calculated.</p>
OPTR	<p>The Order Point Adjuster Threshold Reference (<b>OPTR</b>). The description associated with the Order Point Adjuster for Threshold displays in this field.</p>
OP Threshold Minimum	<p>The minimum order point allowed for this product. If the order point calculated is less than this minimum, the order point will be adjusted up to this minimum as long as the ASQ or 5-Hi adjusters were not greater.</p>
OP Threshold Expire Date	<p>The date by which the threshold minimum order point will expire.</p>
Use ASQ	<p>Identifies if Average Sales Quantity (ASQ) calculations will be performed.</p>
ASQ Use Maximum Value Difference	<p>Identifies if the value in the <b>ASQ Max Val Diff</b> field is used for the ASQ calculation.</p> <p><b>Y</b> indicates the maximum value difference is used. This ensures that any increase to inventory values as a result of the ASQ adjustment does not exceed this dollar limit. If the maximum dollar difference is exceeded, the ASQ adjuster will not be used to override the AIM calculated order point (raw order point) and line point (raw line point).</p> <p><b>N</b> indicates that the maximum dollar difference is not used.</p> <p><b>I</b> (ignore) indicate that a higher record's default will be used. This will instruct the system to review the next record in the Advance Inventory Management Replenishment Options hierarchy until it encounters a <b>Y</b> or <b>N</b> for this setting.</p>

Report/Listing Fields	Description
ASQ Max Val Diff	<p>The maximum value difference. This is the maximum dollar amount that should be used when adjusting inventory values based on the ASQ order point calculation. If the inventory change is greater than this dollar amount, the ASQ adjuster will not be used.</p> <p>This value is used if the <b>ASQ Use Maximum Value Difference</b> field is <b>Y</b>.</p>
Use 5Hi	Identifies if Five-high (5HI) calculations will be performed.
5Hi Use Maximum Value Difference	<p>Identifies if the value in the <b>5-Hi Max Val Diff</b> field is used for the 5-Hi calculation.</p> <p><b>Y</b> indicates the maximum value difference is used. This ensures that any increase to inventory values as a result of the 5-Hi adjustment does not exceed this dollar limit. If the maximum dollar difference is exceeded, the 5-Hi adjuster will not be used to override the AIM calculated order point (raw order point) and line point (raw line point).</p> <p><b>N</b> indicates the maximum dollar difference is not used.</p> <p><b>I</b> (ignore) indicates that a higher record's default for this option will be used. This will instruct the system to review the next record in the Advance Inventory Management Replenishment Options hierarchy until it encounters a <b>Y</b> or <b>N</b> for this setting.</p>
5Hi Max Val Diff	<p>The maximum value difference. This is the maximum dollar amount that should be used when adjusting inventory values based on the 5-Hi order point calculation. If the inventory change is greater than this dollar amount, the 5-Hi adjuster will not be used.</p> <p>This value is used if the <b>5Hi Use Maximum Value Difference</b> field is <b>Y</b>.</p>
Vendor Cost to Purchase	The average cost to create a purchase order for this vendor (the total cost associated with creating, reviewing, approving, printing, mailing, tracking and receiving inventory from a purchase order).
Vendor Cost to Carry	The average vendor cost percentage which is incurred for holding an item in inventory (values include cost of capital, warehouse space, insurance, handling, etc.). This percentage of inventory value is used to determine the cost for holding the inventory in stock.
Vendor Minimum Weeks Supply	If the calculated economic order quantity (EOQ) falls below this value, it will be adjusted to this value.
Vendor Maximum Weeks Supply	If the calculated economic order quantity (EOQ) falls above this value, it will be adjusted to this value.

Report/Listing Fields	Description
Vendor Use EOQ in Suggested Order	Identifies if the economic order quantity (EOQ) will be used for this vendor during suggested order processing, when ordering quantity is considered.
Transf Cost to Purchase	The average cost to create a purchase order for this warehouse transfer (the total cost associated with creating, reviewing, approving, printing, mailing, tracking and receiving inventory from a purchase order).
Transf Cost to Carry	The average warehouse transfer cost percentage which is incurred for holding an item in inventory (values include cost of capital, warehouse space, insurance, handling, etc.). This percentage of inventory value is used to determine the cost for holding the inventory in stock
Transf Minimum Weeks Supply	If the calculated economic order quantity (EOQ) falls below this value, it will be adjusted to this value.
Transf Maximum Weeks Supply	If the calculated economic order quantity (EOQ) falls above this value, it will be adjusted to this value.
Transf Use EOQ in Suggested Order	Identifies if the economic order quantity (EOQ) will be used for this warehouse transfer during suggested order processing, when ordering quantity is considered.
This Month Forecast	The sales forecast for this month.
Trend End Date	The date on which the Seasonal Trending variables will no longer apply.
Trend Minimum Percent	The minimum Trend Percentage to be applied to the item. The calculated Trend Percent cannot fall below this value.
Trend Maximum Percent	The maximum Trend Percentage to be applied to the item. This value must be greater than the <b>Trend Minimum Percent</b> . The calculated Trend Percent cannot exceed this value.
Trend Min Hits Last Year	The minimum number of line hits last year (within the Usage Months time frame) before a Trend Percent will be calculated.
Trend Min Hits This Year	The minimum number of line hits this year (within the Usage Months time frame) before a Trend Percent will be calculated.
Line-Up Months	The number of months (either a positive or negative value) that the starting period (season) used for calculating the average monthly usage (AMU) will be adjusted.
Line-Up End Date	The date on which the Seasonal Line-Up variables will no longer apply.

Report/Listing Fields	Description
Advance by Lead Time	<p><b>Y</b> indicates that the season (starting period) will be adjusted by the lead time for the Advanced Inventory Management Balance File (<b>AIBAL</b>) record. The lead time of the item will be used to extend the starting period.</p> <p><b>N</b> indicates that the season will not be adjusted by the lead time for the <b>AIBAL</b> record.</p>
ASQ Expires Date	The date on which the Average Sales Quantity (ASQ) calculation performed for this product will expire.
5-Hi Expires Date	The date on which the Five-high (5HI) calculation performed for this product will expire.
Threshold Entered Date	The date this product was set up with a threshold minimum order point. Usage Months
Usage Months M/C	<p>One of three codes is displayed with regard to the <b>Usage Months</b> field:</p> <ul style="list-style-type: none"> <li>• <b>A</b> (Automatic) displays if the <b>Usage Months</b> field is maintained automatically and is protected.</li> <li>• <b>O</b> (Override) displays if the <b>Usage Months</b> field has been overridden by a value keyed, and may be maintained. This field will not be changed when Reset AIM Variables (MENU AIMAST) is run.</li> <li>• <b>1-9</b> displays representing the number of months the <b>Usage Months</b> field is to be overridden. At the end of that time, this field will automatically be changed to <b>A</b> by AIM Monthly Update (MENU AIMAST).</li> </ul>
Usage Method	<p>Identifies the method that will be used to calculate the usage rate.</p> <p><b>B</b> indicates the usage rate will be based on the Backward Usage Method.</p> <p><b>T</b> indicates the usage rate will be based on the Trending Usage Method.</p> <p>For further details and examples of each Usage Method type, refer to <a href="#">Usage</a> in the AIM Overview.</p>
Use Low Usage OP Adjuster	Indicates (with <b>Y</b> or <b>N</b> ) if the Low Usage Order Point Adjuster calculation is performed for this product. The Low Usage Order Point Adjuster is used to keep inventory on hand for an item that is experiencing low usage. With the Low Usage Order Point Adjuster, the order point will be adjusted to <b>1</b> , if it was calculated to be zero (due to the low usage of the item).
Low Usage OP Adj Months	Identifies how many months hit data will be used with the Low Usage Order Point Adjuster calculation.

Report/Listing Fields	Description
Low Usage OP Adj Expires	The date on which the Low Usage Order Point (OP) Adjuster calculation performed for this product will expire.
LUA Hits Greater Than	Prints on this listing only when a Low Usage Adjuster exists. The number of hits that must be exceeded to qualify for the Low Usage Adjuster.
LUA Cost Less Than	Prints on this listing only when a Low Usage Adjuster exists. The cost of the item that cannot be exceeded to qualify for the Low Usage Adjuster.
LUA Order Point	Prints on this listing only when a Low Usage Adjuster exists. The new Order Point that will be used if all the Low Usage Adjuster qualifiers were met.

## Chapter 28 Maintaining Replenishment Options

Use Replenishment Options Maintenance on the Advanced Inventory Management File Maintenance Menu (MENU AIFILE) to add or maintain inventory and replenishment settings.

Inventory and replenishment settings are defined at the System, Warehouse, Vendor, Purchasing Line, and/or Item Class/Sub-class levels.

Several setup screens are available through this option that group the parameter settings into the following areas: Ranking, Adjusters, Lead Time, Rounding, Usage, and Exceptions.

Settings defined through this option are retrieved for use in other programs and use the Replenishment hierarchy (shown in the highest to lowest order) that follows.

### Replenishment hierarchy

- WH/Vendor/Pline/Item Class/Item Sub-Class
- Vendor/Pline/Item Class/Item Sub-Class
- WH/Vendor/Pline/Item Class
- Vendor/Pline/Item Class
- WH/Vendor/Pline
- Vendor/Pline
- WH/Vendor
- Vendor
- WH
- System Level
- AIM Options

#### Note:

- Prior to setting parameters through this option, it is suggested that you evaluate which parameters should be applied at the various levels. You may choose to have parameter settings for some and not all levels.
- Additionally, when changes are made, it is suggested that you run the Reset AIM Variables option on the Advanced Inventory Management Master Menu (MENU AIMAST) to reset the AIM variable fields (such as, **Ordering Frequency** and **Lead Time**) in the Advanced Inventory Balance File (**AIBAL**). This will minimize the amount of time for the daily Suggested Order first run. Refer to Reset AIM Variables for additional information.

# Replenishment Options Maintenance

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">Advanced Inventory Management Replenishment Options Screen</a>	Use to select the criteria for which replenishment options are being added or maintained.
<a href="#">Advanced Inventory Management Replenishment Options - Option Listing Screen</a>	Use to review the replenishment options that have been defined, and what level they are defined at.
<a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a>	Use to set up rankings, adjusters, lead time information, rounding information, and exception information.
<a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a>	Use to add, change, or delete ranking parameters.
<a href="#">Advanced Inventory Management Replenishment Options - Detail Ranking View/Selection Screen</a>	Use to set up each rank and the parameters or levels that pertain to the rank.
<a href="#">Advanced Inventory Management Replenishment Options - Ranking Copy Screen</a>	Use to copy an existing replenishment ranking record to a new ranking record.
<a href="#">Advanced Inventory Management Replenishment Options - Detail Ranking Screen</a>	Use to define detail ranking parameters.
<a href="#">Advanced Inventory Management Replenishment Options - Adjusters Screen</a>	Use to add, change, or delete adjuster parameters. The Low Usage Order Point Adjuster Screen 1 and
Low Usage Order Point Adjuster Screen 1 and Screen 2	Screen 2 are both shown and explained in AIM System Options Maintenance (MENU AIFILE).
<a href="#">Advanced Inventory Management Replenishment Options - Lead Time Screen</a>	Use to add, change, or delete lead time parameters.
<a href="#">Advanced Inventory Management Replenishment Options - Warehouse Transfer Rounding Screen</a>	Use to define rounding parameters for use with determining the suggested order quantity for warehouse transfers generated via the Suggested Order Process.
<a href="#">Advanced Inventory Management Replenishment Options - Usage Screen</a>	Use to add, change, or delete usage parameters. Use to add, change, or delete exception parameters.
<a href="#">Advanced Inventory Management Replenishment Options - Exceptions Screen</a>	Use to add, change, or delete additional exception parameters.

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Title	Purpose
<a href="#">Advanced Inventory Management Replenishment Options - Exceptions Continued Screen</a>	Use to define rounding parameters for use with determining the suggested order quantity for warehouse transfers generated via the Suggested Order Process.

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## Advanced Inventory Management Replenishment Options Screen

```

ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS

Warehouse?    - .
Vendor?       .....
Purchasing Line? .....
Item Class?   ... / ...

F3=Exit  F10=List
    
```

This screen appears after you select option **21** - [Replenishment Options Maintenance](#) from MENU AIFILE.

Use this screen to select the criteria for which replenishment options are being added or maintained. When defining system level replenishment options, all fields on this screen must be left blank.

### Advanced Inventory Management Replenishment Options Screen Fields & Function Keys

Field/Function Key	Description
Warehouse	<p>Key the warehouse for which replenishment options are being added or maintained.</p> <p>If you select a purchasing line using the purchasing line list, the warehouse, if any, defined for the purchasing line will automatically appear in this field. You have the option to enter a warehouse without a purchase line, or a purchasing line without a warehouse.</p> <p><b>Valid Values:</b> A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).</p> <p>(A 2) Optional</p>

Field/Function Key	Description
Vendor	<p>Key the vendor for which replenishment options are being added or maintained.</p> <p>If you select a purchasing line using the purchasing line list, the vendor defined for the purchasing line will automatically appear in this field. You have the option to enter a vendor without a purchase line, but if you select to enter a purchasing line, the vendor must be defined for the purchasing line entered.</p> <p><b>Valid Values:</b> A vendor defined through Vendors Maintenance (MENU POFILE/MENU APFILE). (A 6) Optional; required if Purchasing Line is entered</p>
Purchasing Line	<p>Key the purchasing line for which replenishment options are being added or maintained. Purchasing lines provide you with a way to group like items together, for purchasing purposes.</p> <p>If you select a purchasing line using the purchasing line list, the vendor and warehouse, if any, defined for the purchasing line will automatically appear in the <b>Vendor</b> and <b>Warehouse</b> fields on this screen.</p> <p><b>Valid Values:</b> A valid purchasing line defined through Purchasing Line Maintenance (MENU POFIL2). (A 10) Optional; required if Item Class is entered</p>
Item Class	<p>Key the item class and optional sub-class for which replenishment options are being added or maintained.</p> <p>If no sub-class is identified, all sub-classes are included.</p> <p><b>Valid Values:</b> Item classes are defined through Item Class/Sub Class Maintenance (MENU IAFILE) and are assigned to items through Item Master Maintenance (MENU IAFILE). (A 2/A 2) Optional</p>
F3=Exit	<p>Press the <b>F3=EXIT</b> function key to cancel this option and return to MENU AIFILE.</p>
F10=List	<p>Press the <b>F10=LIST</b> function key to display the <a href="#">Advanced Inventory Management Replenishment Options - Option Listing Screen</a>.</p>
Enter	<p>Press the <b>ENTER</b> key to confirm your selections, if any. If all fields are left blank, the <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear and you will be defining system level options. If you keyed values in any fields, the <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear and you will be defining unique replenishment options by warehouse, vendor, purchasing line, and/or item class/sub-class.</p>

## Advanced Inventory Management Replenishment Options - Option Listing Screen

```

ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS
Option Listing
Sl Option      Level      WH Vendor PLine  Itm Cls
1 Ranking     System
2 Adjusters   System
3 Lead Time   System
4 Rounding    System

Last
Select:  .  LIMITS      Option:  .  Level:  .1
           Warehouse?  .  Vendor?  .  Purchasing Line?  .
           Item Class?  . / .

F12=Return
    
```

This screen appears after you press **F10=LIST** on the [Advanced Inventory Management Replenishment Options Screen](#), [Advanced Inventory Management Replenishment Options - Option Selection Screen](#) or [Advanced Inventory Management Replenishment Options - Ranking Copy Screen](#).

Use this screen to review the replenishment options that have been defined, and what level they are defined at.

### Advanced Inventory Management Replenishment Options - Option Listing Screen Fields and Function Keys

Field/Function Key	Description
Sl	This is the reference number of the corresponding line. To select one of the displayed lines, key this number in the <b>Select</b> field. Display

Field/Function Key	Description
Option	<p>This is the type of replenishment option that has been defined through this option. Options include:</p> <ul style="list-style-type: none"> <li>• Ranking</li> <li>• Adjusters</li> <li>• Lead Time</li> <li>• Rounding</li> </ul> <p>Display</p>
Level	<p>This is the level of the replenishment option that has been defined through this option. Levels include:</p> <ul style="list-style-type: none"> <li>• System</li> <li>• Warehouse</li> <li>• Vendor</li> <li>• Purchasing Line</li> <li>• Item Class</li> </ul> <p>Display</p>
WH	<p>This is the warehouse for which replenishment options have been defined. This field is blank for system level replenishment options.</p> <p>Display</p>
Vendor	<p>This is the vendor for which replenishment options have been defined. This field is blank for system level replenishment options.</p> <p>Display</p>
PLine	<p>This is the purchasing line for which replenishment options have been defined. This field is blank for system level replenishment options.</p> <p>Display</p>
Itm Cls	<p>This is the item class/sub-class for which replenishment options have been defined. This field is blank for system level replenishment options.</p> <p>Display</p>
Select	<p>Use this field to select a replenishment option.</p> <p>Key the reference number corresponding to the replenishment option you want to select, and press <b>ENTER</b>.</p> <p>(N 2,0) Optional</p>

Field/Function Key	Description
Option	<p>Use this field to limit the replenishment options displayed on this screen to the option you key in this field.</p> <p>Key <b>1</b> for ranking options.                      Key <b>3</b> for adjuster options.                      Key <b>4</b> for lead time options.                      Key <b>5</b> for rounding options.</p> <p>After keying an option, press <b>ENTER</b> to refresh the screen and show only those options that match the value entered.</p> <p><b>Valid Values:</b> 1, 3, 4, and 5                      (N 1,0) Optional</p>
Level	<p>Use this field to limit the replenishment levels displayed on this screen to the level you key in this field.</p> <p>Key <b>1</b> for system levels.                      Key <b>2</b> for warehouse levels.                      Key <b>3</b> for vendor levels.                      Key <b>4</b> for purchasing line levels.                      Key <b>5</b> for item class/sub-class levels.</p> <p>After keying an option, press <b>ENTER</b> to refresh the screen and show only those options that match the value entered.</p> <p><b>Valid Values:</b> 1 - 5                      (N 2,0) Optional</p>
Warehouse	<p>Use this field to limit the replenishment options displayed on this screen to only those with this warehouse.</p> <p>Key a warehouse in this field and press <b>ENTER</b> to refresh the screen. Only those replenishment options that match the warehouse entered will be shown on this screen.</p> <p><b>Valid Values:</b> A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFIELD) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).                      (A 2) Optional</p>
Vendor	<p>Use this field to limit the replenishment options displayed on this screen to only those with this vendor.</p> <p>Key a vendor in this field and press <b>ENTER</b> to refresh the screen. Only those replenishment options that match the vendor entered will be shown on this screen.</p> <p><b>Valid Values:</b> A vendor defined through Vendors Maintenance (MENU POFIELD/MENU APFIELD).                      (A 6) Optional</p>

Field/Function Key	Description
Purchasing Line	<p>Use this field to limit the replenishment options displayed on this screen to only those with this purchasing line.</p> <p>Key a purchasing line in this field and press <b>ENTER</b> to refresh the screen. Only those replenishment options that match the purchasing line entered will be shown on this screen.</p> <p><b>Valid Values:</b> A valid purchasing line defined through Purchasing Line Maintenance (MENU POFIL2).</p> <p>(A 6) Optional</p>
Item Class	<p>Use this field to limit the replenishment options displayed on this screen to only those with this item class/sub-class.</p> <p>Key a item class/sub-class in this field and press <b>ENTER</b> to refresh the screen. Only those replenishment options that match the item class/sub-class entered will be shown on this screen.</p> <p><b>Valid Values:</b> Item classes are defined through Item Class/Sub Class Maintenance (MENU IAFIL2) and are assigned to items through Item Master Maintenance (MENU IAFIL2).</p> <p>(A 2/A2) Optional</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the previous screen without saving any additions/changes made to this screen. One of the following screens will appear:</p> <ul style="list-style-type: none"> <li>• <a href="#">Advanced Inventory Management Replenishment Options Screen</a></li> <li>• <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a></li> <li>• <a href="#">Advanced Inventory Management Replenishment Options - Ranking Copy Screen</a></li> </ul>
Enter	<p>If you entered limit criteria, press <b>ENTER</b> to refresh the screen and show the information that matches your selections.</p> <p>If you entered a reference number in the <b>Select</b> field, press <b>ENTER</b> to confirm your selection. One of the following screens will appear:</p> <ul style="list-style-type: none"> <li>• <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a></li> <li>• <a href="#">Advanced Inventory Management Replenishment Options - Adjusters Screen</a></li> <li>• <a href="#">Advanced Inventory Management Replenishment Options - Lead Time Screen</a></li> </ul>

## Advanced Inventory Management Replenishment Options - Option Selection Screen

ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS				
Option Selection				
Warehouse:				
Vendor:				
Purchasing Line:				
Item Class:	/			
Level:		System		
F2=Ranking	F5=Adjusters	F7=Rounding	F10=List	
F3=Exit	F6=Lead Time	F8=Usage	F9=Exceptions	F12=Return

This screen appears after you press **ENTER** on the [Advanced Inventory Management Replenishment Options Screen](#).

Use this screen to set up rankings, adjusters, lead time information, rounding information, usage information, and exception information with the use of the **F2=RANKING**, **F5=ADJUSTERS**, **F6=LEAD TIME**, **F7=ROUNDING**, **F8=USAGE**, and **F9=EXCEPTIONS** function keys.

If you left all fields blank on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining system level options as indicated in the Level field on this screen.

If you keyed values on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining unique replenishment options by warehouse, vendor, purchasing line, and optional item class/sub-class. The level will indicate the last level of information you selected on the [Advanced Inventory Management Replenishment Options Screen](#).

The order in which certain levels must be defined is as follows:

- System Level option must be defined before any other level (Warehouse, Vendor, Purchasing Line, or Item Class) option
- Vendor Level option must be defined before the Purchasing Line Level option
- Purchasing Line Level option must be defined before the Item Class option

## Advanced Inventory Management Replenishment Options - Options Selection Screen Fields and Function Keys

Field/Function Key	Description
Warehouse	This field displays the warehouse, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Vendor	This field displays the vendor, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Purchasing Line	This field displays the purchasing line, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Item Class	This field displays the item class/sub-class, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Level	This field displays <b>System</b> if you left all the fields blank on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> , indicating that you are defining system level replenishment options. This field displays the level you are defining unique replenishment options for, if you keyed values on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . For example, if you entered a warehouse only, Warehouse will display in this field. If you entered a warehouse and purchasing line, Purchasing Line will display in this field. Display
F2=Ranking	Press the <b>F2=RANKING</b> function key to define ranking parameters. The <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a> will appear.
F3=Exit	Press the <b>F3=EXIT</b> function key to cancel this option and return to MENU AIFILE.
F5=Adjusters	Press the <b>F5=ADJUSTERS</b> function key to add, change, or delete adjuster parameters. The <a href="#">Advanced Inventory Management Replenishment Options - Adjusters Screen</a> will appear.
F6=Lead Time	Press the <b>F6=LEAD TIME</b> function key to add, change, or delete lead time parameters. The <a href="#">Advanced Inventory Management Replenishment Options - Lead Time Screen</a> will appear.
F7=Rounding	Press the <b>F7=ROUNDING</b> function key to define rounding parameters. The <a href="#">Advanced Inventory Management Replenishment Options - Warehouse Transfer Rounding Screen</a> will appear.

Field/Function Key	Description
F8=Usage	Press the <b>F8=USAGE</b> function key to define usage parameters. The <a href="#">Advanced Inventory Management Replenishment Options - Usage Screen</a> will appear.
F9=Exceptions	Press the <b>F9=EXCEPTIONS</b> function key to define exception parameters. The <a href="#">Advanced Inventory Management Replenishment Options - Exceptions Screen</a> will appear.
F10=List	Press the <b>F10=LIST</b> function key to review the replenishment options that have been defined. The <a href="#">Advanced Inventory Management Replenishment Options - Option Listing Screen</a> will appear.
F12=Return	Press the <b>F12=RETURN</b> function key to return to the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> .

## Advanced Inventory Management Replenishment Options - Ranking Screen

ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS				Change
Ranking				
WH:	Vendor:	PLine:	Item Class:	/
Level: System				
<u>New Products:</u>				
New if created in last: <u>6</u> months.				
<u>Ranking:</u>				
Perform Detail Ranking Functionality: Y				
Number of Ranks to be Used: <u>4</u>				
Months of Line Hit History: <u>19</u>				
Default Rank for New Products: <u>0</u>				
Ranking Based on Number or Percentage of Hits: P, (N/P)				
Total Detail Rank: 100.00 %				
F2=Detail Ranks		F12=Return F24=Delete		

This screen appears after pressing **F2=RANKING** on the [Advanced Inventory Management Replenishment Options - Option Selection Screen](#) or **ENTER** on the [Advanced Inventory Management Replenishment Options - Option Listing Screen](#).

Use this screen to define ranking parameters. Ranking is a method of classifying products based on their relationship to other products in inventory. It ensures that products with a certain volume of sales are ranked higher or lower than others, and that replenishment controls are in place to ensure there is always adequate stock levels for the higher ranked products. Products are ranked, or grouped, by their sales 'hits' for the purpose of aiding with stock control and planning. Line hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction (deleted order/line), regardless of quantity. By tracking a product's line hits, you can rank a product by the volume of transactions it appears on.

With the options on this screen, you can define how many months an item is considered 'new', the number of ranks to be used, the number of months of line hit history to be used during calculations, the default rank to be assigned to your 'new' products, and whether ranking will be determined by the number of sales hits or percentage of sales hits.

Additionally, from this screen, you can access detail ranking information, where you can set up each rank and the parameters that pertain to that rank.

**Note:** If you left all fields blank on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining system level options as indicated in the **Level** field on this screen. If you keyed values on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining unique replenishment options by warehouse, vendor, purchasing line, and optional item

class/sub-class. Depending on what level of replenishment options you are at, some fields may not be available. For example, if you are defining warehouse level parameters, the **Perform Detail Ranking Functionality** and **Number of Ranks to be Used** fields will not be available.

**Advanced Inventory Management Replenishment Options - Ranking Screen Fields and Function Keys**

Field/Function Key	Description
WH	This field displays the warehouse, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Vendor	This field displays the vendor, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
PLine	This field displays the purchasing line, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Item Class	This field displays the item class/sub-class, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Level	This field indicates the level of replenishment options you are defining ranking parameters for. Levels are: <ul style="list-style-type: none"> <li>• System</li> <li>• Warehouse</li> <li>• Vendor</li> <li>• Purchasing Line</li> <li>• Item Class</li> </ul> Display
New if created in last ____ months	Use this field to define the number of months that qualify products as 'new'. Generally, products are defined as new for their first six months in inventory. This allows them to acquire enough usage to be reliable for replenishment recommendations.  Key the number of months an item is considered new. The number of months begins when the item is first received into inventory, not when it is created.  <b>Default Value:</b> Blank <b>Valid Values:</b> Greater than zero Recommended Value: 12 (N 2,0) Required

Field/Function Key	Description
Perform Detail Ranking Functionality	<p>This field is only available at the system level.</p> <p>Use this field to define if you want to perform detail ranking functionality.</p> <p>Key <b>Y</b> to perform detail ranking functionality. Ranking will be calculated based on the number or percentage of hits.</p> <p>Key <b>N</b> if you do not want to perform detail ranking functionality. If you key <b>N</b>, any information entered on the <a href="#">Advanced Inventory Management Replenishment Options - Detail Ranking View/Selection Screen</a> will be stored, but not used.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> Y or N</p> <p>Recommended Value: Y</p> <p>(A 1) Required</p>
Number of Ranks to be Used	<p>This field is only available at the system level.</p> <p>Use this field to define the number of detail ranks to be used. Based on this number, the system determines the number of ranks that will be generated and displayed on the <a href="#">Advanced Inventory Management Replenishment Options - Detail Ranking View/Selection Screen</a>.</p> <p>Key the number of ranking levels (up to 26) that you want to be used, and that are assigned to alphabetic identifiers (A, B, C, and so on). You can enter up to 26 ranks, but it is recommended that you limit the ranks to 5 or less.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1 – 26; 0 allowed only if <b>Perform Detail Ranking Functionality</b> field is <b>N</b>.</p> <p>Recommended Value: 5</p> <p>(N 2,0) Required</p>
Months of Line Hit History	<p>Use this field to define the number of months history to be used when line hits are calculated. For example, each time an item appears on a sales order, it is considered a line hit.</p> <p>Key the number of months of history to use. Line hit history will include invoiced sales order line hits, warehouse transfer line hits, and lost business line hits. Back orders will not be included.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1 - 24</p> <p>Recommended Value: 12</p> <p>(N 2,0) Required</p>

Field/Function Key	Description
Default Rank for New Products	<p>Use this field to define the minimum rank level that should be assigned to new products, based on if the product is considered new, as determined in the <b>New if created in the last ____months</b> field.</p> <p>The recommendation for most new products is to set its rank in the mid- range or “C”. This ensures that for the first six months (or whatever value you enter in the <b>New if created in the last ____months</b> field), the low volume typically experienced by new products will not cause it to be ranked too low a level.</p> <p>Key the default rank to be used for new products.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> Must be an alpha character representing one of the ranks you have elected to use, based on the <b>Number of Ranks to be Used</b> field value entered, e.g., if you elected to use 4 ranks, then valid values for this field can only be A, B, C, D.</p> <p>Recommended Value: C</p> <p>(N 2,0) Required</p>

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**Ranking Based on Number  
or Percentage of Hits**

This field is only available at the system and warehouse levels.

Use this field to define if ranking will be determined by the number of line hits or percentage of line hits.

Key **N** to have the ranking of products based on the minimum number of hits defined on the [Advanced Inventory Management Replenishment Options - Detail Ranking View/Selection Screen](#).

When ranking by Number, each item's number of hits will determine into which rank it will fall. For example:

- Rank A is defined as requiring a minimum number of hits of 450
- Rank B is defined as requiring a minimum number of hits of 350
- Rank C is defined as requiring a minimum number of hits of 100
- Rank D is defined as requiring a minimum number of hits of 1

If an item has less than 1 hit, it will not be ranked; if an item has 1-99 hits, it will be ranked as 'D'; if an item has 100-349 hits, it will be ranked as 'C'; if an item has 350-449 hits, it will be ranked as 'B'; and if an item has 450 or more hits, it will be ranked as 'A'.

Key **P** to have the ranking of products based on a percentage of total hits. When ranking by Percentage, each item's hits will be converted to a percent of hits in the entire warehouse (e.g., this item's hits make up 10% of all hits in the warehouse). Then, the items will be sequenced by the highest percentage down to the lowest. Then, the maximum percentage defined for each rank will be used to determine which rank is assigned to which item, based on its percent. For example, assume:

Your items percentages of hits, in sequence from highest to lowest, are as follows:

- Item 1 has 38.02% of hits in the warehouse
- Item 2 has 30.42% of hits in the warehouse
- Item 3 has 15.21% of hits in the warehouse
- Item 4 has 10.65% of hits in the warehouse
- Item 5 has 5.70% of hits in the warehouse
- Item 6 has 0% of hits in the warehouse (no hits)

Your ranks are defined as follows:

- Rank A is defined as being the top 20% of hits in the warehouse
- Rank B is defined as the next 25% of hits in the warehouse
- Rank C is defined as the next 50% of hits in the warehouse
- Rank D is defined as the last 5% of hits

The first (highest percentage of hits) item will then be ranked as 'A'; this item's percent of hits in the warehouse is 38.02%, which already exceeds the 'A' rank percent limits, so no other items will be ranked as 'A'; the next item will be ranked as 'B'; this item's percent of hits in the warehouse is 30.42%, which already exceeds the 'B'

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rank percent limits, so no other items will be ranked as 'B'; the next item will be ranked as 'C'; this item's percent of hits in the warehouse is 15.21%, which does not exceed the 'C' rank percent limits, so the next item is grabbed and it too is ranked as 'C'; adding this item's percent of hits of 10.65% to the previous 'C' item's percent of 15.21 which totals 25.86%; since this total still does not exceed the 'C' rank percent limits, the next item is grabbed and it too is ranked as 'C'; adding this item's percent of hits of 5.70% to the previous total of 25.95% which now totals 31.56%; this percent is still less than the 'C' rank limits, but since there are no more items with any hits, no more items are ranked. Therefore:

- Item 1 is ranked as A
- Item 2 is ranked as B
- Item 3 is ranked as C
- Item 4 is ranked as C
- Item 5 is ranked as C
- Item 6 is not ranked

If the rank percents were changed as follows:

- Rank A is defined as being the top 35% of hits in the warehouse
- Rank B is defined as the next 40% of hits in the warehouse
- Rank C is defined as the next 5% of hits in the warehouse
- Rank D is defined as the last 20% of hits

The first (highest percentage of hits) item will be ranked as 'A'; this item's percent of hits in the warehouse is 38.02%, which already exceeds the 'A' rank percent limits, so no other items will be ranked as 'A'; the next item will be ranked as 'B'; this item's percent of hits in the warehouse is 30.42%, which does not exceed the 'B' rank percent limits, so the next item is ranked as 'B'; this item's percent of 15.21% added to the 30.42% of the first 'B' item totals 45.61%, which now exceeds the 'B' rank percent limits, so no other items will be ranked as 'B'; the next item will be ranked as 'C'; this item's percent of hits in the warehouse is 10.65%, which exceeds the 'C' rank percent limits, so no other items will be ranked as 'C'; the next item will be ranked as 'D'; its percent of hits of 5.7% does not exceed the 'D' rank limits, but since there are no more items with any hits, no more items are ranked.

Therefore:

- Item 1 is ranked as A
  - Item 2 is ranked as B
  - Item 3 is ranked as B
  - Item 4 is ranked as C
  - Item 5 is ranked as D
-

Field/Function Key	Description
	<ul style="list-style-type: none"> <li>Item 6 is not ranked <b>Default Value:</b> Blank <b>Valid Values:</b> N or P Recommended Value: P (A 1) Required</li> </ul>
Total Detail Rank	<p>This field displays only if the <b>Ranking Based on Number or Percentage of Hits</b> field is <b>P</b>.</p> <p>This field reflects the total allocation of percentage points to all ranks. The ranking is based on the quantity or percentage of hits. If ranking is based on percentage, then this field must equal 100%. To allocate percentages for each rank, press the <b>F2=DETAIL RANKS</b> function key.</p> <p>Display</p>
F2=Detail Ranks	<p>The <b>F2=DETAIL RANKS</b> function key is available only if a value (other than zero) is entered in the <b>Number of Ranks to be Used</b> field.</p> <p>Press the <b>F2=DETAIL RANKS</b> function key to establish levels associated with each rank. The <a href="#">Advanced Inventory Management Replenishment Options - Detail Ranking View/Selection Screen</a> will appear.</p>
F10=Copy	<p>The <b>F10=COPY</b> function key displays only if you are not performing system level replenishment options and are adding a new record.</p> <p>Press the <b>F10=COPY</b> function key to copy an existing replenishment record to the new record you are creating. The <a href="#">Advanced Inventory Management Replenishment Options - Ranking Copy Screen</a> will appear.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a>, without saving any additions/changes made to this screen.</p> <p><b>Important:</b> If you are changing an existing option record and have changed/added detail ranks, these changes/additions are still in effect.</p>
F24=Delete	<p>This field displays in Change or Delete mode only.</p> <p>Press <b>F24=DELETE</b> twice to delete the ranking parameter record displayed. The <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear and the record will be deleted.</p> <p><b>Note:</b> You must delete higher level option before you can delete a lower-level option. For example, if you are trying to delete Warehouse/Vendor options and have previously entered Warehouse/Vendor/PLine options for the same Warehouse/Vendor, then you must first delete the Warehouse/Vendor/PLine options for this Warehouse/Vendor.</p>

Field/Function Key	Description
Enter	Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear.

---

## Advanced Inventory Management Replenishment Options - Detail Ranking View/Selection Screen

ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS											Change	
Detail Ranking View/Selection												
WH: 2		Vendor:		PLine:			Item Class: /					
Level: Warehouse											Total Detail Rank: 100.00 %	
Ranking		-Vendor ARP Safety-			---WH ARP Safety---							
Based On Usage		Least Most Between			Least Most Between							
Sl	C	Rank	Pct	Mths	Days	Days	C	Value	Days	Days	C	Value
1	A	45.00						.00				.00
2	B	30.00						.00				.00
3	C	15.00						.00				.00
4	D	10.00						.00				.00
Select: _ .											Last	
											F12=Return	

This screen appears after pressing **F2=DETAIL RANKS** on the [Advanced Inventory Management Replenishment Options - Ranking Screen](#).

This screen displays ranks and basic information regarding those ranks. This information for a particular rank can then be displayed on the [Advanced Inventory Management Replenishment Options - Detail Ranking Screen](#).

Use this screen to set up each rank and the parameters or levels that pertain to the rank. The ranks displayed on this screen in the C column are determined and created by the value defined in the **Number of Ranks to be Used** field on the [Advanced Inventory Management Replenishment Options - Ranking Screen](#). You can also set the percentage of hits or minimum number of hits per rank, depending on the value in the **Ranking Based on Number or Percentage of Hits** field on the [Advanced Inventory Management Replenishment Options - Ranking Screen](#).

The rankings defined on this screen will set the parameters used to automatically rank your products based on usage within a hierarchy. For example, you could select to have 7 ranks, A through G, and decide to use the percentage of line hits as your scope. You may decide that your **A** rank items might be those that make up just 5% of the hits for the total warehouse. In other words, the first 5% of your items (greatest amount of line hits in descending order) will make up the 'A' classification. You may then decide that your **B** items make up 20% of the line hits for the total of the warehouse, so the next 20% of your items (greatest amount of hits in descending order picking up where 'A' left off) would make up the 'B' classification. Your **C** items, which sell the most and where you make most of your money, make up 50% of the hits for the total of the warehouse, so the next 50% of your items (greatest amount of hits in descending order picking up where 'B' left off) would make up the 'C' classification. At this point, you would have accounted for 75% of the line hits in your rank

definitions (A= 5, B=20, C=50). The rest of the detail ranks (of the 7 you decided to use) can only total to 25% because you cannot exceed 100%. Since you are allowed to have a zero percent defined for the last rank only, you can then define your final ranks of D, E, F, G as 5%, 15%, 5% and 0%, respectively.

If you are defining ranks by percentage instead of number of hits, the **Total Detail Rank** field on this screen (which only displays if you are defining ranks by percentage) is useful to see how you are doing on defining the rank percentages. It also is a good way to see where you may have problems if the rank percent is not in descending order on the screen.

**Note:** If you left all fields blank on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining system level options as indicated in the **Level** field on this screen. If you keyed values on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining unique replenishment options by warehouse, vendor, purchasing line, and optional item class/sub-class.

**Advanced Inventory Management Replenishment Options - Detail Ranking View/Selection Screen Fields and Function Keys**

Field/Function Key	Description
WH	This field displays the warehouse, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Vendor	This field displays the vendor, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Pline	This field displays the purchasing line, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Item Class	This field displays the item class/sub-class, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Level	This field indicates the level of replenishment options you are defining ranking parameters for. Levels are: <ul style="list-style-type: none"> <li>• System</li> <li>• Warehouse</li> <li>• Vendor</li> <li>• Purchasing Line</li> <li>• Item Class</li> </ul> Display

Field/Function Key	Description
Total Detail Rank	<p>This field displays only if you are defining ranks by percentage, as determined on the <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a>.</p> <p>This field reflects the total allocation of percentage points to all ranks. It is a good source of information to see how you are doing defining rank percentages, and to see where you may have problems if the rank percent is not in descending order on the screen.</p> <p>Display</p>
SI	<p>This is the reference number of the corresponding line. To select one of the displayed lines, key this number in the <b>Select</b> field.</p> <p>Display</p>
C	<p>This is the rank level.</p> <p>This level is created based on the <b>Number of Ranks to be Used</b> field on the <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a>.</p> <p>Display</p>
Ranking Based On Rank Pct / Ranking Based On Min Hits	<p>This field will either display <b>Ranking Based On Rank Pct</b> or <b>Ranking Based On Min Hits</b>, depending on the value in the <b>Ranking Based on Number or Percentage of Hits</b> field on the <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a>.</p> <p>This field displays the rank percentage or minimum number of hits for this rank level.</p> <p>Display</p>
Usage Mths	<p>This field displays the number of months that will be used to calculate the usage rate for this rank level.</p> <p>Display</p>
Least Days (Vendor ARP Safety)	<p>This field displays the least amount of days safety there can be for items with this rank that are not supplied by a warehouse transfer vendor.</p> <p>Display</p>
Most Days (Vendor ARP Safety)	<p>This field displays the most amount of days safety there can be for items with this rank that are not supplied by a warehouse transfer vendor.</p> <p>Display</p>

Field/Function Key	Description
Between C (Vendor ARP Safety)	<p>This field displays the safety allowance type to be used to calculate days of safety when the calculation results in a number of days safety that falls between the at least/at most days safety for items not supplied by a warehouse transfer vendor.</p> <p><b>P</b> indicates the safety allowance type is a percent.  <b>D</b> indicates the safety allowance type is days.  <b>I</b> indicates that vendor parameters are ignored and not entered.</p> <p>Display</p>
Between Value (Vendor ARP Safety)	<p>This field displays the value entered for the safety allowance type, either in a percentage or days.</p> <p>Display</p>
Least Days (WH ARP Safety)	<p>This field displays the least amount of days safety there can be for items that are supplied by a warehouse transfer vendor.</p> <p>Display</p>
Most Days (WH ARP Safety)	<p>This field displays the most amount of days safety there can be for items that are supplied by a warehouse transfer vendor.</p> <p>Display</p>
Between C (WH ARP Safety)	<p>This field displays the safety allowance type to be used to calculate days of safety when the calculation results in a number of days safety that falls between the at least/at most days safety for items supplied by a warehouse transfer vendor.</p> <p><b>P</b> indicates the safety allowance type is a percent.  <b>D</b> indicates the safety allowance type is days.  <b>I</b> indicate that warehouse parameters are ignored and not entered.</p> <p>Display</p>
Between Value (WH ARP Safety)	<p>This field displays the value entered for the safety allowance type, either in a percentage or days.</p> <p>Display</p>
Select	<p>Use this field to select a rank.</p> <p>Key the reference number of the rank for which you want to define/change detail rankings, and press <b>ENTER</b>.</p> <p>(N 2,0) Optional</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a>, without making a selection.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selection. The <a href="#">Advanced Inventory Management Replenishment Options - Detail Ranking Screen</a> will appear.</p>

## Advanced Inventory Management Replenishment Options - Ranking Copy Screen

```

ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS  Add
RANKING COPY

Copy To:
Warehouse:      1           Hartford, CT
Vendor:
Purchasing Line:
Item Class:      /

Copy From:
Warehouse?      - .
Vendor?         .....
Purchasing Line? .....
Item Class?     ... / ...

F10=List  F12=Return

```

This screen displays after pressing **F10=COPY** on the [Advanced Inventory Management Replenishment Options - Ranking Screen](#).

Use this screen to copy an existing replenishment ranking record to a new ranking record. This functionality can be used for Ranking, Adjusters, and Lead Time. The title of this screen will vary depending on what option you are currently working on (that is, the second line of the title might be Ranking Copy, Adjusters Copy, or Lead Time Copy).

This functionality assists with your setup options. For example, if you have already defined a Warehouse Ranking record for warehouse 1, and you now need to set up ranking options for warehouse 2, and the information is like what was entered for warehouse 1, this will allow you to copy all the ranking parameters from warehouse 1 to warehouse 2. You then can go into the warehouse 2 record and modify the specific information for warehouse 2.

### Advanced Inventory Management Replenishment Options - Ranking Copy Screen Fields and Function Keys

Field/Function Key	Description
Copy To Warehouse	This field displays the warehouse, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> for which you want to copy an existing replenishment record to this new record.
	Display

Field/Function Key	Description
Copy To Vendor	<p>This field displays the vendor, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> for which you want to copy an existing replenishment record to this new record.</p> <p>Display</p>
Copy To Purchasing Line	<p>This field displays the purchasing line, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> for which you want to copy an existing replenishment record to this new record.</p> <p>Display</p>
Copy To Item Class	<p>This field displays the item class/sub-class, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> for which you want to copy an existing replenishment record to this new record.</p> <p>Display</p>
Copy From Warehouse	<p>Use this field to enter an existing replenishment record that you want to copy to the new record you are creating.</p> <p>Key the warehouse for which a record exists.</p> <p>(A 2) Optional</p>
Copy From Vendor	<p>Use this field to enter an existing replenishment record that you want to copy to the new record you are creating.</p> <p>Key the vendor for which a record exists.</p> <p>(A 6) Optional</p>
Copy From Purchasing Line	<p>Use this field to enter an existing replenishment record that you want to copy to the new record you are creating.</p> <p>Key the purchasing line for which a record exists.</p> <p>(A 10) Optional</p>
Copy From Item Class	<p>Use this field to enter an existing replenishment record that you want to copy to the new record you are creating.</p> <p>Key the item class/sub-class for which a record exists.</p> <p>(A 2 / A 2) Optional</p>
F10=List	<p>Press the <b>F10=LIST</b> function key to display the <a href="#">Advanced Inventory Management Replenishment Options - Option Listing Screen</a>.</p>
F12=Return	<p>Press the <b>F12=RETURN</b> function key to return to the <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a>, without updating this screen.</p>

Field/Function Key	Description
Enter	Press the <b>ENTER</b> key to confirm your selections and copy the existing record to the new record you are creating. The <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a> will appear.

---

## Advanced Inventory Management Replenishment Options - Detail Ranking Screen

```

ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS  Change
Detail Ranking

WH:      Vendor:      PLine:      Item Class:  /
Level: System                               Total Detail Rank: 100.00 %

Ranking Detail Based On:
Rank Level: A Rank Percent: .80.00 Minimum Hits: .....
Usage Rate Calculation:
Use: .3 Months Usage.
Min/Max Lead Time Safety Adjustments:
ARP Vendor Safety: Lead Time Falls Between Min/Max, set Type: P, to: ..1.00
Assure at Least Equal to: ..1 Days.
Assure at Most Equal to: ..45 Days.
ARP Warehouse Safety: Lead Time Falls Between Min/Max, set Type: P, to: .35.00
Assure at Least Equal to: ..7 Days.
Assure at Most Equal to: ..30 Days.
PO Receipt Safety Exceptions:
Action: R Max Receipts: ...3 Max Months: 30 Max out of Range: ..45
Less Than Safety Percent: ..2.00 Greater Than Safety Percent: ..5.00

F12=Return
    
```

This screen displays after selecting and pressing **ENTER** on the [Advanced Inventory Management Replenishment Options - Detail Ranking View/Selection Screen](#).

Use this screen to define detail ranking parameters, including many which will be used to override other default values that were set up at the system level through AIM System Options Maintenance (MENU AIFILE), such as the Usage or Safety Adjustment Type values. Other parameters, such as those related to the PO Receipt Safety Exceptions, do not have any default values in any other option and are defined only at this detail ranking level.

### Ranking Detail

The Ranking Detail fields identify the parameters that actually define each rank. Based on the selection made for the **Ranking Based on Number or Percentage of Hits** field on the [Advanced Inventory Management Replenishment Options - Ranking Screen](#), the parameters will include either a rank percent or a minimum number of hits.

### Usage

The Usage Months value informs the system how many months to look at when collecting usage data for the Average Monthly Usage (AMU) calculation. This AMU is later used to calculate Average Daily Usage (ADU), which in turn is used to calculate an item's safety stock. The AMU calculation is:

**Calculation: Usage over time period/usage months**

The usage months defined here override that defined in AIM System Options Maintenance (MENU AIFILE), but this value itself can also be overridden through Item Balance Maintenance (MENU IAFILE) at the Item Balance/AIM Balance level.

## Safety Adjustments

The Safety Adjustment settings defined on this screen affect how an item's safety stock will be calculated and adjusted. These values override the AIM System Options Maintenance (MENU AIFILE) values when calculating safety quantity, and can be defined separately for your purchasing vendors than for your transfer (warehouse) vendors. While these values themselves cannot be overridden outside of these detail rank replenishment records, the final calculated and adjusted safety quantity can be overridden through Item Balance Maintenance (MENU IAFILE) at the Item Balance/ AIM Balance level.

In AIM, the safety stock quantity calculation is:

**Calculation:  $ADU * \text{Safety Days}$** 

These values defined on this screen help determine the safety days. The safety days is calculated based on the safety type; this type determines if the safety days will be calculated based on a percent (P) or will be set to a fixed number of days (D). If based on a percent, this safety days will then be adjusted to the limits (adjusted up to at least x days or adjusted down to at most x days), if applicable.

If safety type is days (D) with x number of days, then the system will use the x number of days as the safety days.

If safety type is percent (P) with x percent, then the system will use the x percent multiplied by the item's lead time to come up with safety days. Then, it determines if that calculated safety days falls within the low-high limits set by the **Assure at Least Equal To** and **Assure at More Equal To** fields (e.g., must be at least 3 days but no more than 100 days). If it does fall within those limits, it uses that value as the safety days value. If not, it will adjust the value up to meet the 'least' days (e.g., 3) or adjust the value down to meet the 'most' assure days (e.g., 100) and then use that least or most value for the safety days.

**Note:** Once the safety quantity has been calculated, then based on the AIM system options (Safety Rounding), this value can be rounded to either a whole number or not. Refer to AIM System Options Maintenance (MENU AIFILE) for details on the Safety Rounding related fields.

It is recommended that you define a lower safety allowance for rank **A** products as compared to rank **B** or **C**.

When the safety quantity is changed by the selections on this screen, the new settings will be stored in the Advanced Inventory Management Balance File (**AIBAL**).

## Safety Exceptions

The PO Receipt Safety Exceptions defined on this screen will be used in conjunction with other parameters to determine when to generate an exception, if applicable, during PO Receipt processing. The values entered here provide the rules to be followed if and when a PO Receipt Safety Exception occurs. These PO Receipt Safety Exceptions provide notification to the buyers that they may have either too much safety stock reserved, or not enough and are in danger of stocking out. It gives the buyers an indication where they could reduce costs associated with safety stock, yet keep service levels high. (Safety stock is a quantity of an item in inventory that is used as a buffer to compensate for excess customer demand, or longer than usual lead times. The purpose of a safety stock is to prevent stockouts or backorders.)

If these safety exception options are set up, a PO Receipt Safety Exception can occur for an AIM planned item when the item is being received on a PO for the item balance's specific ARP vendor (note that warehouse transfer vendors are included).

For each receipt post process meeting this criteria, the system will perform a calculation to determine, at that moment (before the receipt quantity updates net available), exactly what is the item's current product safety percent. This current product safety percent is calculated as:

**Calculation: (AIBAL's safety quantity / ITBAL's net available, which does not yet include the quantity of the receipt being processed) \* 100**

Once this product safety percent is calculated, the system stores that percent on the item's Purchase Order Receipt History record (**RCPT** record, or at Distribution A+ versions prior to 10.01.00, the Receipt History Extension File (**RCPTX**)) for future reference.

The system then compares that calculated percent at the time of this receipt, to the parameters/thresholds set in the Less Than Safety Percent and Greater Than Safety Percent fields on this screen. These are considered min/max safety percents and are generally set to a value like 25% and 75%, respectively. Note that if no detail rank records exist, or these values are blank, no comparisons will be done.

If the item's calculated product safety percent at that moment falls within those min/max safety percents, then nothing further is done. But if the item's calculated product safety percent falls outside of that min/max percent range, then the system looks at the **RCPT** record (or **RCPTX** file) to find and review a previous number of receipts (for this item/warehouse/vendor), based on the information provided in the **Max Receipts**, **Max Months**, and **Max Out of Range** fields, to determine if an exception should be generated. Specifically, it looks back to those receipts posted in the last x months (**Max Months**), and looks at the last x receipts (**Max Receipts**) in those months, and reviews the previously stored Product Safety Percent which was calculated at that time of each of those receipts. And, if it finds at least x many (**Max Out of Range**) that also fall outside of the min/max safety percent range defined in the Less Than **Safety Percent** and **Greater Than Safety Percent** fields, then an exception will be generated and stored in the AIM Exception Purchase Order Safety Review File (**AIEPSR**) (if specified in the **Action** field).

**Note:** If you left all fields blank on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining system level options as indicated in the Level field on this screen. If you keyed values on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining unique replenishment options by warehouse, vendor, purchasing line, and optional item class/sub-class.

**Note:** You cannot delete a ranking record. A rank can only be deleted if the number of ranks to be used is changed to a smaller number and then only ranks higher than this number will be deleted.

### Advanced Inventory Management Replenishment Options - Detail Ranking Screen Fields and Function Keys

Field/Function Key	Description
WH	This field displays the warehouse, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Vendor	This field displays the vendor, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
PLine	This field displays the purchasing line, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Item Class	This field displays the item class/sub-class, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Level	This field indicates the level of replenishment options you are defining ranking parameters for. Levels are: <ul style="list-style-type: none"> <li>• System</li> <li>• Warehouse</li> <li>• Vendor</li> <li>• Purchasing Line</li> <li>• Item Class</li> </ul> Display
Total Detail Rank	This field displays only if you are defining ranks by percentage, as determined on the <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a> . This field reflects the total allocation of percentage points to all ranks. It is a good source of information to see how you are doing defining rank percentages, and to see where you may have problems if the rank percent is not in descending order on the screen. Display
Rank Level	This is the rank level that is currently having its options defined, as selected on the <a href="#">Advanced Inventory Management Replenishment Options - Detail Ranking View/Selection Screen</a> . Display

Field/Function Key	Description
Rank Percent	<p>This option can only be defined at the system and warehouse level. If products are being ranked based on Percentage of Hits, as determined on the <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a>, use this field to key a percentage that must be met or exceeded for an item to qualify for this rank.</p> <p>A rank percent of <b>0</b> is permitted for the following:</p> <ul style="list-style-type: none"> <li>• When the Rank Level is the lowest level shown on the Advanced Inventory Management Replenishment Options - Detail Ranking View/ Selection Screen.</li> <li>• When the Rank Level is not the lowest level shown on the Advanced Inventory Management Replenishment Options - Detail Ranking View/ Selection Screen, the level is the warehouse level, and a rank percent was entered at the system level for this Rank Level.</li> </ul> <p>The total percentage of all ranks must equal 100 before you can exit this screen.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 0 through 100</p> <p>Recommended Value: For <b>Rank Level A</b>, 80; for <b>Rank Level B</b>, 15; for <b>Rank Level C</b>, 4; for <b>Rank Level D</b>, 1; for <b>Rank Level E</b>, 0</p> <p>(N 5.2) Required</p>

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Field/Function Key	Description
Minimum Hits	<p>This option can only be defined at the system and warehouse level. If products are being ranked based on Number of Hits, as determined on the <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a>, use this field to key the minimum number of hits that must be met or exceeded for an item to qualify for this rank. This minimum must be entered in descending order starting with rank 'A'. This descending order (where each value is less than the previous one) will be validated before you can exit this screen.</p> <p>Assume you decide that there must be a minimum number of hits of 24 within 12 months for a product to be ranked as an 'A' product. Next, you select rank level 'B' and enter 12. Products with 12 to 23 hits in 12 months will be ranked as 'B' products.</p> <p>A minimum hits of <b>0</b> is permitted for the following:</p> <ul style="list-style-type: none"> <li>• When the Rank Level is the lowest level shown on the Advanced Inventory Management Replenishment Options - Detail Ranking View/ Selection Screen.</li> <li>• When the Rank Level is not the lowest level shown on the Advanced Inventory Management Replenishment Options - Detail Ranking View/ Selection Screen, the level is the warehouse level, and a rank percent was entered at the system level for this Rank Level.</li> </ul> <p><b>Valid Values:</b> 0 through 999,999,999 (N 9,0) Required</p>
Use Months Usage	<p>Use this field to specify the number of months used to calculate the usage rate. This will apply to each rank and should be no greater than 12. The usage months are used during calculations to determine the average usage rate.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> should not exceed 12; otherwise, a warning displays Recommended Value: For <b>Rank Level A</b>, 3; for <b>Rank Level B</b>, 4; for <b>Rank Level C</b>, 5; for <b>Rank Level D</b>, 6; for <b>Rank Level E</b>, 6 (N 2,0) Required</p>

Field/Function Key	Description
ARP Vendor Safety: Lead Time Falls Between Min/Max, set Type ___ to ___	<p>Use this field to specify the safety allowance type to be used to calculate days of safety when the calculation results in a number of days safety that falls between the at least/at most days safety for items not supplied by a warehouse transfer vendor.</p> <p>Key <b>P</b> to define percent as the safety allowance type.</p> <p>Key <b>D</b> to define days as the safety allowance type. If you key <b>D</b>, the <b>Assure at Least Equal to</b> and <b>Assure at Most Equal to</b> fields must be left blank.</p> <p>Key <b>I</b> if you do not want to adjust the safety allowance. If you key <b>I</b>, you cannot enter vendor parameters.</p> <p>Once you set the type, in the corresponding <b>to:</b> field, key the percentage or number of days.</p> <p>Your setting for this mid-level range should be different for each rank level. Rank 'A' products may require a safety allowance equivalent to 50% or lower. Lower ranking products may need a higher safety allowance adjustment.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> vendor set type must be P, D, or I</p> <p>Recommended Value: For <b>Rank Level A, P</b> (Percentage) / 50; for <b>Rank Level B, P</b> (Percentage) / 75; for <b>Rank Level C, P</b> (Percentage) / 100; for <b>Rank Level D, P</b> (Percentage) / 125; for <b>Rank Level E, I</b> (Ignore) / 0</p> <p>(A 1) Required</p>
Assure at Least Equal to	<p>Use this field to key the least amount of days safety there can be for items that are not supplied by a warehouse transfer vendor.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1 through 999</p> <p>Recommended Value: For <b>Rank Level A</b>, 7; for <b>Rank Level B</b>, 7; for <b>Rank Level C</b>, 7; for <b>Rank Level D</b>, 7; for <b>Rank Level E</b>, 0</p> <p>(N 3,0) Required</p>
Assure at Most Equal to	<p>Use this field to key the most amount of days safety there can be for items that are not supplied by a warehouse transfer vendor.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1 through 999</p> <p>Recommended Value: For <b>Rank Level A</b>, 30; for <b>Rank Level B</b>, 30; for <b>Rank Level C</b>, 30; for <b>Rank Level D</b>, 30; for <b>Rank Level E</b>, 0</p> <p>(N 3,0) Required</p>

Field/Function Key	Description
ARP Warehouse Safety: Lead Time Falls Between Min/ Max, set Type ___ to ___	<p>This field displays the safety allowance type to be used to calculate days of safety when the calculation results in a number of days safety that falls between the at least/at most days safety for items supplied by a warehouse transfer vendor.</p> <p>Key <b>P</b> to define percent as the safety allowance type.</p> <p>Key <b>D</b> to define days as the safety allowance type. If you key <b>D</b>, the <b>Assure at Least Equal to</b> and <b>Assure at Most Equal to</b> fields must be left blank.</p> <p>Key <b>I</b> if you do not want to adjust the safety allowance. If you key <b>I</b>, you cannot enter warehouse parameters.</p> <p>Once you set the type, in the corresponding to: field, key the percentage or number of days.</p> <p>Your setting for this mid-level range should be different for each rank level. Rank 'A' products may require a safety allowance equivalent to 50% or lower. Lower ranking products may need a higher safety allowance adjustment.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> warehouse set type must be P, D, or I</p> <p>Recommended Value: For <b>Rank Level A, P</b> (Percentage) / 50; for <b>Rank Level B, P</b> (Percentage) / 60; for <b>Rank Level C, P</b> (Percentage) / 75; for <b>Rank Level D, P</b> (Percentage) / 100; for <b>Rank Level E, I</b> (Ignore) / 0</p> <p>(A 1) Required</p>
Assure at Least Equal to	<p>Use this field to key the least amount of days safety there can be for items that are supplied by a warehouse transfer vendor.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1 through 999</p> <p>Recommended Value: For <b>Rank Level A</b>, 7; for <b>Rank Level B</b>, 7; for <b>Rank Level C</b>, 7; for <b>Rank Level D</b>, 7; for <b>Rank Level E</b>, 0</p> <p>(N 3,0) Required</p>
Assure at Most Equal to	<p>Use this field to key the most amount of days safety there can be for items that are supplied by a warehouse transfer vendor.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1 through 999</p> <p>Recommended Value: For <b>Rank Level A</b>, 30; for <b>Rank Level B</b>, 30; for <b>Rank Level C</b>, 30; for <b>Rank Level D</b>, 30; for <b>Rank Level E</b>, 0</p> <p>(N 3,0) Required</p>

Field/Function Key	Description
PO Receipt Safety Exceptions - Action	<p>This field determines what action will be taken when a PO Receipt Safety Exception (issue) occurs. That is, do you want to be notified if you have either too much safety stock reserved, or not enough and are in danger of stocking out.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Purchase Order Safety Review Exception File (<b>AIEPSR</b>), and will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Purchase Order Safety Review (PSR).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Purchase Order Safety Review Exception File (<b>AIEPSR</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the Replenishment hierarchy to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> R, S, or blank</p> <p>Recommended Value: For all <b>Rank Levels A</b> through <b>E</b>, <b>R</b> (Report) (A 1) Optional</p>
PO Receipt Safety Exceptions - Max Receipts	<p>This field determines the maximum number of receipt records (working backward from today and only within the Max Months time frame) that will be looked at when the system is reviewing previous receipt data to see if those previous receipts were also outside of the min/max safety percents (defined in the <b>Less Than Safety Percent</b> and <b>Greater Than Safety Percent</b> fields). That is, these Purchase Order Receipt History records (<b>RCPT</b>) will be looked at to find the stored calculated product safety percent from each record, and compare each to the min/max safety percent values to see if they are out of range.</p> <p>Key the maximum number of receipt records that you want the system to review.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-9999, or 0 if Action field is not R</p> <p>Recommended Value: For <b>Rank Level A</b>, 6; for <b>Rank Level B</b>, 5; for <b>Rank Level C</b>, 4; for <b>Rank Level D</b>, 3; for <b>Rank Level E</b>, 3 (N 4,0) Optional</p>

Field/Function Key	Description
PO Receipt Safety Exceptions - Max Months	<p>This field determines the maximum number of months (working backward from today) that will be looked at to find Purchase Order Receipt History records (<b>RCPT</b>) (up to the max number of receipts defined in the <b>Max Receipts</b> field) when the system is reviewing previous receipt data to see if those previous receipts were also outside of the min/max safety percents (defined in the <b>Less Than Safety Percent</b> and <b>Greater Than Safety Percent</b> fields). That is, these <b>RCPT</b> records will be looked at to find the stored calculated product safety percent from each record and compare each to the min/max safety percent values to see if they are out of range.</p> <p>Key the maximum number of months that will be looked at to find <b>RCPT</b> records.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-99, or 0 if Action field is not <b>R</b></p> <p>Recommended Value: For <b>Rank Level A</b>, 6; for <b>Rank Level B</b>, 8; for <b>Rank Level C</b>, 10; for <b>Rank Level D</b>, 12; for <b>Rank Level E</b>, 12 (N 2,0) Optional</p>
PO Receipt Safety Exceptions - Max Out of Range	<p>This field determines the minimum number of out-of-range receipt records found when using the <b>Max Receipts</b> and <b>Max Months</b> values that will trigger an exception. When looking at the Purchase Order Receipt History records (<b>RCPT</b>) selected by the <b>Max Receipts</b> in the <b>Max Months</b>, if there are at least x found (where x is this <b>Max Out of Range</b> value), then an exception can occur.</p> <p>Key the maximum out of range number.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-9999, or 0 if Action field is not <b>R</b></p> <p>Recommended Value: For <b>Rank Level A</b>, 5; for <b>Rank Level B</b>, 4; for <b>Rank Level C</b>, 3; for <b>Rank Level D</b>, 2; for <b>Rank Level E</b>, 2 (N 4,0) Optional</p>

Field/Function Key	Description
PO Receipt Safety Exceptions - Less Than Safety Percent	<p>This field determines the lowest/minimum product safety percent that will be considered acceptable ('within range') and would not cause an exception. When the system is reviewing previous receipt data to see if those previous receipts have a product safety percent that was outside of the min/max safety percent parameters, it is this <b>Less Than Safety Percent</b> value that serves as that 'min'. The Purchase Order Receipt History records (<b>RCPT</b>) will be reviewed to locate the stored calculated product safety percent from each record, and then compare that value from each record to this min safety percent value you key in this field to see if they are out of range.</p> <p>Key the less than safety percentage.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-999.99, or 0 if Action field is not <b>R</b></p> <p>Recommended Value: For all <b>Rank Levels A</b> through <b>E</b>, 50 (N 5,2) Optional</p>
PO Receipt Safety Exceptions - Greater Than Safety Percent	<p>This field determines the highest/maximum product safety percent that will be considered acceptable ('within range') and would not cause an exception. When the system is reviewing previous receipt data to see if those previous receipts have a product safety percent that was outside of the min/max safety percent parameters, it is this <b>Greater Than Safety Percent</b> value that serves as that 'max'. The Purchase Order Receipt History records (<b>RCPT</b>) will be reviewed to locate the stored calculated product safety percent from each record, and then compare that value from each record to this max safety percent value you key in this field to see if they are out of range.</p> <p>Key the greater than safety percentage.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-999.99, or 0 if <b>Action</b> field is not <b>R</b></p> <p>Recommended Value: For all <b>Rank Levels A</b> through <b>E</b>, 150 (N 5,2) Optional</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Replenishment Options - Detail Ranking View/Selection Screen</a>, without saving any additions/changes made to this screen.</p>
Enter	<p>Press <b>ENTER</b> twice to confirm your selections. The <a href="#">Advanced Inventory Management Replenishment Options - Detail Ranking View/Selection Screen</a> will appear.</p>

## Advanced Inventory Management Replenishment Options - Adjusters Screen

ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS		Change
Adjusters		
WH:	Vendor:	PLine: Item Class: /
Level: System		
Currency: USD US Dollars		
<u>Average Sales Quantity (ASQ):</u>		
Use ASQ:		Y
Ignore if Line Hits is less than:		.....3.
Include Transfer Line Hits:		Y
Calculation Method (Usage Period or History):		H
Use Max Val Diff: Y	Max Value Difference:	.....500.00 US\$
<u>Five-High Sales (S-Hi):</u>		
Use SHI:		Y
Ignore if Line Hits is less than:		.....3.
Include Transfer Line Hits:		Y
Calculation Method (Usage Period or History):		U
Use Max Val Diff: Y	Max Value Difference:	.....250.00 US\$
<u>Low Usage OP Adjuster:</u>		
Use: Y, Y	Months to Use:	12, 12
F2=Low Usq OP Adj		F12=Return F24=Delete

This screen displays after pressing **F5=ADJUSTERS** on the [Advanced Inventory Management Replenishment Options - Option Selection Screen](#).

Use this screen to determine the use of, and to add, change, or delete parameters related to, several AIM order point adjusters. Order point adjusters provide you with the ability to modify the normally calculated order point of an AIM planned item to a higher value by using one of several secondary calculation methods. Then, by identifying specific parameters on this screen, you can limit/better manage which items will have their order points adjusted by the noted adjusters.

Using adjusters allows you to better manage products that experience exceptional usage, better manage customer buying habits on a product-by-product basis (since the order point is adjusted on products based on customer's actual buying habits) and improve customer service. With certain products, normal averaging of usage when determining replenishment amounts does not take into consideration instances such as when customers buy larger quantities on less frequent orders. In other words, if a product experiences minimal hits, but the quantities are higher than average usage for the product, you may experience a shortage of stock if you use standard replenishment recommendations. This can be a common occurrence if some of your customers order in standard packs, while others order smaller quantities.

In Item Balance Maintenance (MENU IAFILE), a flat threshold minimum adjuster value can be identified, with an expiration date, on the AIM Information Ordering Screen for a specific AIM planned item. In addition to that, the system provides three other adjusters that can be used to calculate the order points for more than just one item (so not specific to just one particular item's AIBAL, like the threshold adjuster is) using several other, secondary calculations, which are: Average Sales Quantity (ASQ), Five-high Quantity (5HI), and Low Usage Adjuster (LUA).

When using one or more of these adjusters, the system will calculate an item's order point not only using the normal calculation but also by using those selected adjuster methods. Once all the calculations using all the selected methods are performed, the system then determines which calculation resulted in the highest order point and assigns that highest order point to the item; whichever adjuster was used would appear in the Order Point Adjuster field shown on the AIM Information Screen in Item Balance Maintenance (MENU IAFILE).

Unlike the threshold, which is simply a flat value keyed, the ASQ is calculated by dividing the Usage by Line Hits. If the ASQ calculation is greater than the order point calculated, the order point can be adjusted to the ASQ value if other order adjusters are not greater. Note that the calculation will not be performed if the minimum number of line hits defined on this screen is not met. The adjustment must not exceed the maximum dollar difference for the ASQ adjustment.

The 5HI is calculated by reviewing the highest sales for all months included in the usage calculation to arrive at the five highest sales quantities. The highest quantity is removed, and then the remaining sales are added together and divided by the number of high sales used. If this average is greater than the calculated order point, the order point can be adjusted to equal this value if other order adjusters are not greater. The adjustment must not exceed the maximum dollar difference for the 5HI adjustment. This adjustment to the standard order point compensates for products where sales hits are low, but customers tend to buy package quantities, such as a case.

The Low Usage Order Point Adjuster allows the changing or adjusting of the normal calculated order point in AIM to a 1 if it had been calculated to be zero (due to the low usage of the item). A specific number of months must be identified for the system to know from which months to collect the item's hit history to be used for the calculation (note that the Low Usage Adjuster (LUA) will be looking at the item's hits over this number of months, which can be different, if desired, than the number of months used for the straight usage in the normal order point calculation which resulted in the zero order point). Then, once this number of months for hit data has been identified, you will set up specific parameters (i.e., limits) that must be met in order for this adjuster to be applied. These parameters are identified on the [Low Usage Order Point Adjuster System 1 Screen](#), accessed via the **F2=LOW USG OP ADJ** function key on this screen.

**Note:** If you left all fields blank on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining system level options as indicated in the **Level** field on this screen. If you keyed values on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining unique replenishment options by warehouse, vendor, purchasing line, and optional item class/sub-class.

**Note:** Many fields on this screen default from those defined through AIM System Options Maintenance (MENU AIFILE) but can be overridden on this screen and also again at the **AIBAL** level on the AIM Information Ordering Screen in Item Balance Maintenance (MENU IAFILE).

### Advanced Inventory Management Replenishment Options - Adjusters Screen Fields and Function Keys

Field/Function Key	Description
WH	This field displays the warehouse, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display

Field/Function Key	Description
Vendor	<p>This field displays the vendor, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a>.</p> <p>Display</p>
Pline	<p>This field displays the purchasing line, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a>.</p> <p>Display</p>
Item Class	<p>This field displays the item class/sub-class, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a>.</p> <p>Display</p>
Level	<p>This field indicates the level of replenishment options you are defining adjuster parameters for. Levels are:</p> <ul style="list-style-type: none"> <li>• System</li> <li>• Warehouse</li> <li>• Vendor</li> <li>• Purchasing Line</li> <li>• Item Class</li> </ul> <p>Display</p>
Currency	<p>If a warehouse has been entered, this field displays the currency of the company that controls the warehouse.</p> <p>If a warehouse has not been entered, it displays the default local currency.</p> <p>Display</p>
Use ASQ	<p>This field indicates whether or not Average Sales Quantity (ASQ) calculations will be performed when determining the order point value.</p> <p><b>Y</b> displays if ASQ is being used.</p> <p><b>N</b> displays if ASQ is not being used.</p> <p>Display</p>

Field/Function Key	Description
ASQ: Ignore if Line Hits is less than	<p>Use this field to enter the minimum number of line hits required for the Average Sales Quantity (ASQ) calculation. If the total line hits during the standard usage months is equal to or greater than this number, the ASQ calculation will be performed.</p> <p>Key the minimum number of line hits for the ASQ calculation.</p> <p>If this value is zero, the ASQ parameters will not be used and you cannot enter values in the remaining ASQ fields. The system will review the next record in the Advance Inventory Management Replenishment Options hierarchy for valid settings.</p> <p><b>Note:</b> Warehouse transfer hits will be included when determining if the product meets the minimum number of hits if the <b>ASQ: Include Transfer Line Hits</b> is also <b>Y</b>.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: 3</p> <p>(N 9,0) Optional</p>
ASQ: Include Transfer Line Hits	<p>Use this field to specify if you want to include warehouse transfer line hits in the minimum number of hits to process the ASQ calculation. Warehouse transfer hits are stored in the AIM Line Hits File (<b>AILNH</b>).</p> <p>Key <b>Y</b> to include warehouse transfer line hits.</p> <p>Key <b>N</b> if you do not want to include warehouse transfer line hits.</p> <p>Key <b>I</b> (ignore) if you are setting up a warehouse, vendor, purchasing line, or item class replenishment record (not available for system level record), and want to use a higher record's default for this option. This will instruct the system to review the next record in the Advance Inventory Management Replenishment Options hierarchy until it encounters a <b>Y</b> or <b>N</b> for this setting.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: Y</p> <p>(A 1) Optional; Required if "ASQ: Ignore if Line Hits is less than" field is entered</p>
ASQ: Calculation Method (Usage Period or History)	<p>Use this field to specify the calculation method you want used for the ASQ calculation.</p> <p>Key <b>U</b> to use the Usage Period for the calculation method.</p> <p>Key <b>H</b> to use History for the calculation method.</p> <p>Key <b>I</b> (ignore) to look at a higher level for this value.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: U</p> <p>(A 1) Optional; Required if "ASQ: Ignore if Line Hits is less than" field is entered</p>

Field/Function Key	Description
ASQ: Use Maximum Value Difference	<p>Use this field to indicate if you want to use the value you key in the <b>ASQ: Maximum Value Difference</b> field for the ASQ calculation.</p> <p>Key <b>Y</b> to use the maximum value difference. This ensures that any increase to inventory values as a result of the ASQ adjustment does not exceed this dollar limit. If the maximum dollar difference is exceeded, the ASQ adjuster will not be used to override the calculated order point (raw order point) and line point (raw line point).</p> <p>Key <b>N</b> if you do not want to use the maximum dollar difference.</p> <p>Key <b>I</b> to ignore this field if you are setting up a warehouse, vendor, purchasing line, or item class replenishment record (not available for system level record). This will instruct the system to use the hierarchy to select the default for this field.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: Y</p> <p>(A 1) Optional; Required if “ASQ: Ignore if Line Hits is less than” field is entered</p>
ASQ: Maximum Value Difference	<p>If the <b>ASQ: Use Maximum Value Difference</b> field is <b>Y</b>, use this field to enter the maximum dollar amount that should be used when adjusting inventory values based on the ASQ order point calculation. If the inventory change is greater than this dollar amount, the ASQ adjuster will not be used.</p> <p>Key the maximum value difference.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: 500</p> <p>(N 13,2) Required if “ASQ: Use Maximum Value Difference” field is Y; otherwise, must be blank</p>
Use 5HI	<p>This field indicates whether or not Five-high (5HI) calculations will be performed when determining the order point value.</p> <p><b>Y</b> displays if 5HI is being used.</p> <p><b>N</b> displays if 5HI is not being used.</p> <p>Display</p>

Field/Function Key	Description
5HI: Ignore if Line Hits is less than	<p>Use this field to enter the minimum number of line hits required for the 5HI calculation. If the total line hits during the standard usage months is equal to or greater than this number, the 5HI calculation will be performed.</p> <p>Key the minimum number of line hits for the 5HI calculation.</p> <p>If this value is zero, the 5HI parameters will not be used and you cannot enter values in the remaining 5HI fields. The system will review the next record in the Advanced Inventory Management Replenishment Options hierarchy for valid settings.</p> <p><b>Note:</b> Warehouse transfer hits will be included when determining if the product meets the minimum number of hits if the <b>5HI: Include Transfer Line Hits</b> is also <b>Y</b>.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: 3</p> <p>(N 9,0) Optional</p>
5HI: Include Transfer Line Hits	<p>Use this field to specify if you want to include warehouse transfer line hits in the minimum number of hits to process the 5HI calculation. Warehouse transfer hits are stored in the AIM Line Hits File (<b>AILNH</b>).</p> <p>Key <b>Y</b> to include warehouse transfer line hits.</p> <p>Key <b>N</b> if you do not want to include warehouse transfer line hits.</p> <p>Key <b>I</b> (ignore) if you are setting up a warehouse, vendor, purchasing line, or item class replenishment record (not available for system level record), and want to use a higher record's default for this option. This will instruct the system to review the next record in the Advance Inventory Management Replenishment Options hierarchy until it encounters a <b>Y</b> or <b>N</b> for this setting.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: Y</p> <p>(A 1) Optional; Required if "5HI: Ignore if Line Hits is less than" field is entered</p>
5HI: Calculation Method (Usage Period or History)	<p>Use this field to specify the calculation method you want used for the 5HI calculation.</p> <p>Key <b>U</b> to use the Usage Period for the calculation method.</p> <p>Key <b>H</b> to use History for the calculation method.</p> <p>Key <b>I</b> (ignore) to look at a higher level for this value.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: U</p> <p>(A 1) Optional; Required if "5HI: Ignore if Line Hits is less than" field is entered</p>

Field/Function Key	Description
5HI: Use Maximum Value Difference	<p>Use this field to indicate if you want to use the value you key in the <b>5HI: Maximum Value Difference</b> field for the 5HI calculation.</p> <p>Key <b>Y</b> to use the maximum value difference. This ensures that any increase to inventory values as a result of the 5HI adjustment does not exceed this dollar limit. If the maximum dollar difference is exceeded, the 5HI adjuster will not be used to override the calculated order point (raw order point) and line point (raw line point).</p> <p>Key <b>N</b> if you do not want to use the maximum dollar difference.</p> <p>Key <b>I</b> (ignore) if you are setting up a warehouse, vendor, purchasing line, or item class replenishment record (not available for system level record), and want to use a higher record's default for this option. This will instruct the system to review the next record in the Advance Inventory Management Replenishment Options hierarchy until it encounters a <b>Y</b> or <b>N</b> for this setting.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: Y</p> <p>(A 1) Optional; Required if "5HI: Ignore if Line HIts is less than" field is entered</p>
5HI: Maximum Value Difference	<p>If the <b>5HI: Use Maximum Value Difference</b> field is <b>Y</b>, use this field to enter the maximum dollar amount that should be used when adjusting inventory values based on the 5HI order point calculation. If the inventory change is greater than this dollar amount, the 5HI adjuster will not be used.</p> <p>Key the maximum value difference.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: 250</p> <p>(N 13,2) Required if "<b>5HI: Use Maximum Value Difference</b>" field is Y; otherwise, must be blank</p>

Field/Function Key	Description
Low Usage OP Adjuster: Use	<p>Use this field to select the value for whether or not the Low Usage Order Point Adjuster will be used for AIM planned items.</p> <p>The default value defined through AIM System Options Maintenance (MENU AIFILE) will appear to the right of this field. This field will be protected at the system level and the default value defined through AIM System Options Maintenance will be used.</p> <p>The Low Usage Order Point Adjuster is used to keep inventory on hand for an item that is experiencing low usage. With the Low Usage Order Point Adjuster, the order point will be adjusted to <b>1</b>, if it was calculated to be zero (due to the low usage of the item).</p> <p>Key <b>Y</b> to use the Low Usage Order Point Adjuster. If used, this adjuster can generate an Inventory Change Value Exception, and in this case, the exemption will be stored in the Low Usage Adjuster Exemption File (<b>AIEIVL</b>). Refer to the <a href="#">Advanced Inventory Management Replenishment Options - Usage Screen</a> for details about this exception.</p> <p>Key <b>N</b> if you do not want to use the Low Usage Order Point Adjuster.</p> <p><b>Default Value:</b> Value shown next to field</p> <p><b>Valid Values:</b> Y, N or Blank</p> <p>Recommended Value: Y</p> <p>(A 1) Required</p>

Field/Function Key	Description
Low Usage OP Adjuster: Months to Use	<p>Use this field to define how many months hit data will be used with the Low Usage Order Point Adjuster calculation.</p> <p>The default value defined through AIM System Options Maintenance (MENU AIFILE) will appear to the right of this field. This field will be protected at the system level and the default value defined through AIM System Options Maintenance will be used.</p> <p>If the <b>Low Usage Order Point Adjuster: Use</b> field is <b>Y</b> on this screen (at the system level) or <b>Y</b> at the default level in AIM System Options Maintenance (MENU AIFILE), this field must contain a valid value. This field must be <b>0</b> when the <b>Low Usage Order Point Adjuster: Use</b> field is either <b>N</b> on this screen or at the default level in AIM System Options Maintenance (MENU AIFILE).</p> <p>The number of months you key in this field determines the number of months that will be reviewed to collect the item's hit history (note that the Low Usage Order Point Adjuster will be reviewing the item's hits over this number of months, which can be different, if desired, than the number of months used for the straight 'usage' in the normal order point calculation which resulted in the zero order point).</p> <p><b>Note:</b> Multiple Low Usage OP Adjuster parameters can be set up in this option, AIM System Options Maintenance (MENU AIFILE), Interactive Forecasting (MENU AIMAIN/IMMAIN), and Item Balance Maintenance (MENU IAFILE) on the AIM Information Ordering Screen accessed via the <b>F2=ORDERING</b> function key. Refer to those menu options for further details.</p> <p>Key <b>0</b> or leave blank if the <b>Low Usage OP Adjuster: Use</b> field is <b>N</b>. Key a value <b>1</b> to <b>12</b> if the <b>Low Usage OP Adjuster: Use</b> field is <b>Y</b>.</p> <p><b>Default Value:</b> Value shown next to field</p> <p><b>Valid Values:</b> blank; 0 to 12</p> <p>Recommended Value: 3</p> <p>(N 2,0) Required</p>
F2=Low Usg OP Adj	<p>Press <b>F2=LOW USG OP ADJ</b> to display the <a href="#">Low Usage Order Point Adjuster System 1 Screen</a>.</p>
F10=Copy	<p>The <b>F10=COPY</b> function key displays only if you are not performing system level replenishment options and are adding a new record.</p> <p>Press the <b>F10=COPY</b> function key to copy an existing replenishment record to the new record you are creating. The <a href="#">Advanced Inventory Management Replenishment Options - Ranking Copy Screen</a> will appear.</p>

Field/Function Key	Description
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> , without saving any additions/changes made to this screen.
F24=Delete	<p>This field displays in Change mode only.</p> <p>Press <b>F24=DELETE</b> twice to delete the parameter record displayed. The <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear and the record will be deleted.</p> <p><b>Note:</b> You must delete higher level option before you can delete a lower-level option. For example, if you are trying to delete Warehouse/Vendor options and have previously entered Warehouse/Vendor/PLine options for the same Warehouse/Vendor, then you must first delete the Warehouse/Vendor/ PLine options for this Warehouse/Vendor.</p>
Enter	Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear.

## Advanced Inventory Management Replenishment Options - Lead Time Screen

```

ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS  Change
Lead Time

WH:      Vendor:      PLine:      Item Class:  /
Level: System

Minimum/Maximum Lead Time Override:
Lead Time Less than:  ..7 days, set ARP Vendor Lead Time to:  ..7 days
Lead Time Greater than: ..60 days, set ARP Vendor Lead Time to:  ..60 days
Lead Time Less than:  ..5 days, set ARP Warehouse Lead Time to:  ..5 days
Lead Time Greater than: ..5 days, set ARP Warehouse Lead Time to:  ..5 days

Lead Time Average Calculation:
Use: ...3 Receipts over the last: ..5 months.

Lead Time Percentage Exception:
Action: .. Less Than Percent: ..... Greater Than Percent: .....

F12=Return  F24=Delete

```

This screen displays after pressing **F6=LEAD TIME** on the [Advanced Inventory Management Replenishment Options - Option Selection Screen](#).

Use this screen to add, change, or delete lead time parameters. Lead time parameters allow you to override lead times using a min/max setting based on the vendor/warehouse ARP, set options that apply a lead time average, and set options that apply a lead time percentage exception.

### General Lead Time Percentage Exception Information

For AIM planned items, when a receipt is posted, the item's lead time for that receipt is calculated and stored on the Purchase Order Receipt History record (**RCPT**). When the **Upd Lead** option on a PO is set to **Y** for an AIM planned item, the **RCPT** record for that receipt will be set as **Ignore Lead Time = N**, and thus the lead time that was calculated and stored on the **RCPT** record will be included in the average lead time calculation and the AIM Balance File (**AIBAL**) will be updated with a new lead time, including this receipt's lead time. There are times, however, when a particular receipt has an unusual lead time, and as such, should be excluded from the lead time calculations for this item. By setting Purchase Order Lead Time Review Exception parameters/thresholds, the system can automatically change a receipt being processed from **Ignore Lead Time = N** to **Ignore Lead Time = Y** if its lead time falls outside of those parameters/thresholds. This situation can then lead to a PO Lead Time Exception to notify the buyer that the lead times for the items/vendors may need to be reviewed/adjusted.

## Lead Time Percentage Exceptions

The values entered on this screen provide the rules to be followed if and when a PO Lead Time Review Exception occurs.

A PO Lead Time Review Exception can only occur for an AIM planned item when the item is being received on a PO for the item balance's specific ARP vendor (note that warehouse transfer vendors are included).

In general, when an AIM item receipt is being posted, the system calculates its lead time and stores that value in the Purchase Order Receipt History record (**RCPT**). Refer to [CHAPTER 3: AIM Calculations](#) for details about how lead time is calculated. Along with the calculated lead time, the PO indication for whether or not the receipt should update the item's average lead time is also stored in the same file (an item that is flagged to update lead time on the PO will be stored in **RCPT** as **Ignore Lead Time = N**). Those lead times on those **RCPT** records with **Ignore Lead Time = N** are then used in calculating the item's total lead time (provided the receipt falls within the Lead Time Average Calculation parameters defined in the replenishment options).

There are some receipts, however, that are processed with lead times that are much higher/lower than expected, and as such, should not only be excluded from the item's average lead time calculation, but in fact, should also cause an exception notification to the buyer to let them know the item's lead time might need to be investigated and possibly adjusted.

By using the parameters/threshold values entered here, the system can automatically change an item's **Ignore Lead Time** to a **Y**, so that its lead time for that receipt will not be used in the item's average lead time calculation and will cause the PO Lead Time Review Exception to be generated.

Upon receipt, the system compares the lead time of the new receipt to the item's average lead time to determine if the new lead time has changed by more than the parameters/thresholds set in these **Less Than Percent** and **Greater Than Percent** fields (these are considered min/max lead time percents).

If there is no change in the receipt's calculated lead time, or its change falls within those min/max percents, then nothing further is done. But, if the new receipt's calculated lead time falls outside of that min/max percent range, then the system updates the **RCPT** record to **Ignore Lead Time = Y**, and an exception will be generated and stored in the AIM Exception Purchase Order Lead Time Review File (**AIEPLT**) (if specified in the Action field).

**Note:** Exceptions are generated, if you select to report exceptions via the **Action** field, based on many different parameters you define. The exception values entered on this screen are used in conjunction with other parameters to determine if and when an exception will occur.

**Note:** If you left all fields blank on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining system level options as indicated in the **Level** field on this screen. If you keyed values on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining unique replenishment options by warehouse, vendor, purchasing line, and optional item class/sub-class.

---

**Advanced Inventory Management Replenishment Options - Lead Time Screen Fields and Function Keys**

Field/Function Key	Description
WH	This field displays the warehouse, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Vendor	This field displays the vendor, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
PLine	This field displays the purchasing line, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Item Class	This field displays the item class/sub-class, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Level	This field indicates the level of replenishment options you are defining lead time parameters for. Levels are: <ul style="list-style-type: none"><li>• System</li><li>• Warehouse</li><li>• Vendor</li><li>• Purchasing Line</li><li>• Item Class</li></ul> Display

---

Field/Function Key	Description
Lead Time Less than ____ days	<p>Use this field to enter the minimum number of lead time days that is allowed without using the default settings in the <b>set ARP Vendor Lead Time to days</b> field. If the value that gets calculated is below this field, then the number in the <b>set ARP Vendor Lead Time to days</b> field becomes the default. If lead time falls below this value on an order with a vendor ARP, the override days are used.</p> <p>Key the minimum number of lead time days that will be allowed before default settings will be used.</p> <p><b>Example:</b> If you key <b>10</b> days in this field and <b>15</b> days into the <b>set ARP Vendor Lead Time to days</b> field, if the system calculates the lead time days to be 8 days, since the calculated days of 8 is less than the 10 days entered in this field, the system will use the default entered in the <b>set ARP Vendor Lead Time to days</b> field (so, the lead time becomes 15 days). If, however, the system calculated 12 days, since the calculated days 12 is greater than 10 days entered in this field, the system would use this calculated value of 12 instead of replacing it with the default of 15 (entered in the <b>set ARP Vendor Lead Time to ____ days</b> field).</p> <p><b>Default Value:</b> Blank  Recommended Value: 0  (N 3,0) Required</p>
set ARP Vendor Lead Time to ____ days	<p>Use this field to enter the default lead time days to use if the calculated lead time falls below the minimum lead time days.</p> <p>Key the lead time days.</p> <p>Refer to the example in the <b>Lead Time Less than ____ days</b> field.</p> <p><b>Default Value:</b> Blank  Recommended Value: 0  (N 3,0) Required</p>

Field/Function Key	Description
Lead Time Greater than ___ days	<p>Use this field to enter the maximum number of lead time days that is allowed without using the default settings in the <b>set ARP Vendor Lead Time to days</b> field. If the value that gets calculated is below this field, then the number in the <b>set ARP Vendor Lead Time to days</b> field becomes the default. If lead time exceeds this value, the override days are used.</p> <p>Key the maximum number of lead time days that will be allowed before default settings will be used.</p> <p><b>Example:</b> If you key <b>30</b> days in this field and <b>28</b> days into the set <b>ARP Vendor Lead Time to days</b> field, if the system calculates the lead time days to be 40 days, since the calculated days of 40 is greater than the 30 days entered in this field, the system will use the default entered in the set <b>ARP Vendor Lead Time to days</b> field (so, the lead time becomes 28 days). If, however, the system calculated 25 days, since the calculated days 25 is less than 30 days entered in this field, the system would use this calculated value of 25 instead of replacing it with the default of 28 (entered in the set <b>ARP Vendor Lead Time to ___ days</b> field).</p> <p><b>Default Value:</b> Blank  Recommended Value: 0  (N 3,0) Required</p>
set ARP Vendor Lead Time to ___ days	<p>Use this field to enter the default lead time days to use if the calculated lead time exceeds the maximum lead time days.</p> <p>Key the lead time days.</p> <p>Refer to the example in the <b>Lead Time Greater than ___ days</b> field.</p> <p><b>Default Value:</b> Blank  Recommended Value: 0  (N 3,0) Required</p>

Field/Function Key	Description
Lead Time Less than ____ days	<p>Use this field to enter the minimum number of lead time days that is allowed without using the default settings in the <b>set ARP Warehouse Lead Time to days</b> field. If the value that gets calculated is below this field, then the number in the <b>set ARP Warehouse Lead Time to ____ days</b> field becomes the default. If lead time falls below this value on an order with a warehouse ARP, the override days are used.</p> <p>Key the minimum number of lead time days that will be allowed before default settings will be used.</p> <p><b>Example:</b> If you key <b>10</b> days in this field and <b>15</b> days into the set <b>ARP Warehouse Lead Time to days</b> field, if the system calculates the lead time days to be 8 days, since the calculated days of 8 is less than the 10 days entered in this field, the system will use the default entered in the set <b>ARP Warehouse Lead Time to days</b> field (so, the lead time becomes 15 days). If, however, the system calculated 12 days, since the calculated days 12 is greater than 10 days entered in this field, the system would use this calculated value of 12 instead of replacing it with the default of 15 (entered in the set <b>ARP Warehouse Lead Time to days</b> field).</p> <p><b>Default Value:</b> Blank  Recommended Value: 0  (N 3,0) Required</p>
set ARP Warehouse Lead Time to ____ days	<p>Use this field to enter the default lead time days to use if the calculated lead time falls below the minimum lead time days.</p> <p>Key the lead time days.</p> <p>Refer to the example in the <b>Lead Time Less than ____ days</b> field.</p> <p><b>Default Value:</b> Blank  Recommended Value: 0  (N 3,0) Required</p>

Field/Function Key	Description
Lead Time Greater than ___ days	<p>Use this field to enter the maximum number of lead time days that is allowed without using the default settings in the <b>set ARP Warehouse Lead Time to days</b> field. If the value that gets calculated is below this field, then the number in the <b>set ARP Warehouse Lead Time to days</b> field becomes the default. If lead time exceeds this value, the override days are used.</p> <p>Key the maximum number of lead time days that will be allowed before default settings will be used.</p> <p><b>Example:</b> If you key <b>30</b> days in this field and <b>28</b> days into the set <b>ARP Warehouse Lead Time to days</b> field, if the system calculates the lead time days to be 40 days, since the calculated days of 40 is greater than the 30 days entered in this field, the system will use the default entered in the set <b>ARP Warehouse Lead Time to ___ days</b> field (so, the lead time becomes 28 days). If, however, the system calculated 25 days, since the calculated days 25 is less than 30 days entered in this field, the system would use this calculated value of 25 instead of replacing it with the default of 28 (entered in the set <b>ARP Warehouse Lead Time to days</b> field).</p> <p><b>Default Value:</b> Blank  Recommended Value: 0  (N 3,0) Required</p>
set ARP Warehouse Lead Time to days	<p>Use this field to enter the default lead time days to use if the calculated lead time exceeds the maximum lead time days.</p> <p>Key the lead time days.</p> <p>Refer to the example in the <b>Lead Time Greater than ___ days</b> field.</p> <p><b>Default Value:</b> Blank  Recommended Value: 0  (N 3,0) Required</p>

Field/Function Key	Description
<p>Lead Time Average Calculation: Use Receipts over the last months</p>	<p>Use this field to enter the number of receipts to use when calculating average lead time. Only valid receipts that have the <b>Ignore Lead Time</b> flag set to “no” will be considered. If you leave this field blank, when calculations are performed, the last two receipts will be used to calculate the lead time.</p> <p>After you have keyed the number of receipts to use, key the number of months to use when calculating average lead time and reviewing the number of receipts specified in the first portion of this field. It is recommended that you do not exceed 12 months.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: 4 receipts / 6 months (N 4,0 / N2,0) Required</p>
<p>Lead Time Percentage Exception: - Action</p>	<p>This field determines what action will be taken when a PO Receipt Lead Time Exception (issue) occurs. That is, do you want to be notified when an item's lead time might need to be investigated and possibly adjusted; when receipts are processed with lead times that are much higher/lower than expected, and as such, should not only be excluded from the item's average lead time calculation, but in fact, should also cause an exception notification.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Purchase Order Lead Time Review Exception File (<b>AIEPLT</b>), and will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Purchase Order Lead Time Review (PLT).</p> <p>Additionally, when data exists that generates an exception record, the Receipt History File (<b>RCPT</b>) will have the <b>Ignore Lead Time</b> field set to <b>Y</b> for the same transaction since you are reviewing this exception through the Exception Center.</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Purchase Order Lead Time Review Exception File (<b>AIEPLT</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the Replenishment hierarchy to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> R, S, or blank</p> <p>Recommended Value: R (A 1) Optional</p>

Field/Function Key	Description
Lead Time Percentage Exception: Less Than Percent	<p>This field determines the minimum change percent desired for a new item's lead time.</p> <p>If the calculated lead time for a new receipt changes by less than this <b>Less Than Percent</b> value, the system will change the <b>Ignore Lead Time</b> value to <b>Y</b> in the Purchase Order Receipt History record (<b>RCPT</b>) and will generate an exception, which will be stored in the AIM Exception Purchase Order Lead Time Review Exception File (<b>AIEPLT</b>) (if specified in the <b>Action</b> field).</p> <p>Key the less than lead time percentage.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-999.99, or 0 if <b>Action</b> field is not <b>R</b></p> <p>Recommended Value: 50</p> <p>(N 5,2) Optional</p>
Lead Time Percentage Exception: Greater Than Percent	<p>This field determines the maximum change percent desired for a new item's lead time.</p> <p>If the calculated lead time for a new receipt changes by more than this <b>Greater Than Percent</b> value, the system will change the <b>Ignore Lead Time</b> value to <b>Y</b> in the Purchase Order Receipt History record (<b>RCPT</b>) and will generate an exception, which will be stored in the AIM Exception Purchase Order Lead Time Review Exception File (<b>AIEPLT</b>) (if specified in the Action field).</p> <p>Key the greater than lead time percentage.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-999.99, or 0 if <b>Action</b> field is not <b>R</b></p> <p>Recommended Value: 150</p> <p>(N 5,2) Optional</p>
F10=Copy	<p>The <b>F10=COPY</b> function key displays only if you are not performing system level replenishment options and are adding a new record.</p> <p>Press the <b>F10=COPY</b> function key to copy an existing replenishment record to the new record you are creating. The <a href="#">Advanced Inventory Management Replenishment Options - Ranking Copy Screen</a> will appear.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a>, without saving any additions/changes made to this screen.</p>

Field/Function Key	Description
F24=Delete	<p>This field displays in Change mode only.</p> <p>Press <b>F24=DELETE</b> twice to delete the parameter record displayed. The <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear and the record will be deleted.</p> <p><b>Note:</b> You must delete higher level option before you can delete a lower-level option. For example, if you are trying to delete Warehouse/Vendor options and have previously entered Warehouse/Vendor/PLine options for the same Warehouse/Vendor, then you must first delete the Warehouse/Vendor/PLine options for this Warehouse/Vendor.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear.</p>

## Advanced Inventory Management Replenishment Options - Warehouse Transfer Rounding Screen

```

ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS  Add
Warehouse Transfer Rounding

WH:      Vendor:      PLine:      Item Class:  /
Level: System
Currency: USD US Dollars

Unit Method:
Transfer Unit Rounding: ..
Buying Unit Rounding:  ..

Unit Rounding Settings:
Use ,, Months Usage for Existing Products.

Unit Cost Maximum:
Extra Qty Cost for New Products cannot exceed: ..... US$
Extra Qty Cost for Existing Products cannot exceed: ..... US$

F12=Return

```

This screen displays after pressing **F7=ROUNDING** on the [Advanced Inventory Management Replenishment Options - Option Selection Screen](#).

Use this screen to add, change, or delete Warehouse Transfer Rounding parameters for use with determining the suggested order quantity for warehouse transfers generated via the Suggested Order Process. Warehouse Transfer Rounding parameters provide the system with information that helps evaluate the needed and normally calculated suggested order quantity against the effectiveness of possibly rounding up that quantity to a more cost-effective buy unit/quantity.

Warehouse Transfer Rounding parameters allow you to:

- first define which units of measure (UOM) for a product will be reviewed when determining if a warehouse transfer quantity of that item should be rounded; possible UOMs are the:
  - buy UOM from the warehouse transfer's vendor's Vendor/Item File record if one exists; otherwise, it is the item's primary UOM (both of which are referred to as the "Transfer Unit").
  - buy UOM from the warehouse transfer's purchasing vendor's Vendor/Item File record if one exists (referred to as the "Buying Unit").

**Note:** If no rounding is to occur, the calculated quantity for the suggested order will be in the item's default UOM.

- identify the number of months supply to use when comparing the rounded transfer quantity for existing products to ensure the rounded up quantity does not exceed the total usage quantity for this number of months.

- select the maximum cost allowance for any extra quantity used in the rounding up of a new product's quantity to a transfer or buy unit.
- select the maximum cost allowance for any extra quantity used in the rounding up of an existing product's quantity to a transfer or buy unit.

These parameters ensure that the rounding up process does not exceed maximum cost values (which can be set differently for new and existing items), and/or a maximum number of months supply for existing products only.

**Note:** If you left all fields blank on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining system level options as indicated in the **Level** field on this screen. If you keyed values on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining unique replenishment options by warehouse, vendor, purchasing line, and optional item class/sub-class.

**Advanced Inventory Management Replenishment Options - Warehouse Transfer Rounding Screen Fields and Function Keys**

Field/Function Key	Description
WH	This field displays the warehouse, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Vendor	This field displays the vendor, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
PLine	This field displays the purchasing line, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Item Class	This field displays the item class/sub-class, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Level	This field indicates the level of replenishment options you are defining parameters for. Levels are: <ul style="list-style-type: none"> <li>• System</li> <li>• Warehouse</li> <li>• Vendor</li> <li>• Purchasing Line</li> <li>• Item Class</li> </ul> Display

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Field/Function Key	Description
Currency	If a warehouse has been entered, this field displays the currency of the company that controls the warehouse. If a warehouse has not been entered, this field displays the default local currency. Display

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Unit Method:

- Transfer Unit Rounding
- Buying Unit Rounding

The Unit Method defines which units of measure (UOM) for a product will be reviewed when determining if a warehouse transfer quantity of that item should be rounded. Transfer rounding ensures that the quantity of an item being transferred is completed in the most cost effective unit of measure. The possible product units of measure for WH transfers are:

- buy UOM from the warehouse transfer's vendor's Vendor/Item File record if one exists; otherwise, it is the item's primary UOM (both of which are referred to as the "Transfer Unit").
- buy UOM from the warehouse transfer's purchasing vendor's Vendor / Item File record if one exists (referred to as the "Buying Unit").

**Note:** If no rounding is to occur, the calculated quantity for the suggested order will be in the item's default UOM.

You can define whether one or both units will be considered. Hierarchy type rules are in place and parameters can be established to ensure that if both UOMs are selected for use, the most cost-effective method will be used.

Refer to the example at the end of this field definition for assistance in helping you determine the best method to use.

You are allowed to enter up to four different selections in both the **Transfer Unit Rounding** field (relating to the buy unit of measure on the warehouse transfer's vendor's Vendor/Item File record), and the **Buying Unit Rounding** field (relating to the buy unit of measure on the warehouse's transfer's purchasing vendor's Vendor/Item File record). By allowing up to four different selections in each of these fields, the system allows for you to set the desired combinations that best suits your needs.

**Transfer Unit Rounding** - Key one of the four available options:

- **T** (Transfer Unit). Key **T** to use the warehouse transfer's vendor's Vendor/ Item File buy unit of measure (or the item's primary unit of measure if no Vendor/Item File record exists) when rounding up transfer quantities. This unit cannot be changed manually on the warehouse transfer.
- **S** (Smart Unit). Key **S** to use smart transfer rounding when you want the system to evaluate the cost and help decide for you which method is best to use (that is, the system will evaluate the cost of rounding up to the purchasing vendor's buy unit of measure). If the cost difference for the extra quantity needed to make it a transfer unit is less than the unit cost maximum defined in the **Unit Cost Maximum** fields, then the quantity is rounded up to avoid breaking a package (unit). If both the **Transfer Unit Rounding field** and **Buying Unit Rounding field** are set to **S**, the larger of the two-buy unit of measures will be used, as long as it falls within the cost difference parameters.

- **N** (Never Round). Key **N** to use standard logic when handling units on warehouse transfers; the suggested order quantity will not utilize either the Transfer Unit or the Buying Unit information in the Vendor/Item File so will never round up. The suggested order quantity will be in the item's default UOM.
- **I** (Ignore). Key **I** if you do not want rounding performed at this record level; instead, the setting options for the previous level will be used. Since these options can be set at the various levels (system, warehouse, vendor, etc.), you might decide not to use these options at any particular level and therefore can set both the **Transfer Unit Rounding** field and **Buying Unit Rounding** field to **I** to indicate that you want the previous level settings used instead.

If either **Unit Method** field is **I**, the other **Unit Method** field must also be set to **I**.

For example, if you select **I** at the product line record level, the system will look at the Advance Inventory Management Replenishment Options vendor record rounding parameters. If those are also set to **I**, it will move up the hierarchy until it finds rounding parameters that are not **I**.

Note that **I** cannot be selected when defining/maintaining system level parameters.

**Buying Unit Rounding** - Key one of the four available options:

- **B** (Buying Unit). Key **B** to use the warehouse transfer's purchasing vendor's vendor/item file buy unit of measure when rounding up transfer quantities (note that the purchasing vendor can be found on the warehouse's item balance record). This unit cannot be changed manually on the warehouse transfer.
- **S** (Smart Unit). Key **S** to use smart transfer rounding when you want the system to evaluate the cost and help decide for you which method is best to use (that is, the system will evaluate the cost of rounding up to the purchasing vendor's vendor/item file buy unit of measure). If the cost difference for the extra quantity needed to make it a transfer unit is less than the unit cost maximum defined in the Unit Cost Maximum fields, then the quantity is rounded up to avoid breaking a package (unit). If both the **Transfer Unit Rounding** and **Buying Unit Rounding** fields are **S**, the larger of the two buy unit of measures will be used, as long as it falls within the cost difference parameters.
- **N** (Never Round). Key **N** to use standard logic when handling units on warehouse transfers; the suggested order quantity will not utilize either the Transfer Unit vendor/item file information or the Buying Unit vendor/ item file information so will never round up. The suggested order quantity will be in the item's default UOM.

- **I (Ignore)**. Key **I** if you do not want rounding performed at this record level; instead, the setting options for the previous level will be used. Since these options can be set at the various levels (system, warehouse, vendor, etc.), you might decide not to use these options at any particular level and therefore can set both the **Transfer Unit Rounding** field and **Buying Unit Rounding** field to **I** to indicate that you want the previous level settings used instead.

If either **Unit Method** field is **I**, the other **Unit Method** field must also be set to **I**.

For example, if you select **I** at the product line record level, the system will look at the Advance Inventory Management Replenishment Options vendor record rounding parameters. If those are also set to **I**, it will move up the hierarchy until it finds rounding parameters that are not **I**.

Note that **I** cannot be selected when defining/maintaining system level parameters.

#### Example

Assume you have item A500 defined as CAS (case) and EA (each) as its unit of measures, and EA is set up as the default. You also buy this item from vendor 200 to stock your items in warehouse 1 (the Item Balance File in warehouse 1 has vendor 200). You do not buy this item from a purchasing vendor to stock in warehouse 2, but rather you perform warehouse transfers from warehouse 1 when you need inventory in warehouse 2 (the Item Balance File in warehouse 2 has vendor/warehouse 1).

So, you create a vendor/item record for a purchasing vendor 200, and make the buy unit of measure as **GWB** (which is vendor 200's gross weight box, consisting of 100 CAS). You then create a vendor/item record for transfer vendor 1; the buy unit of measure defaults to **CAS** (the primary unit of measure) and it cannot be changed.

If you ran suggested orders for the item in warehouse 1, the system will suggest that you order the quantity in the purchasing vendor/item buy unit of measure of **GWB**, since that is the buy unit of measure for warehouse's 1's vendor 200.

If you ran suggested orders for the item in warehouse 2, the system will suggest that you order the quantity in the transfer vendor/item buy unit of measure of **CAS**, since that is the buy unit of measure for warehouse 2's vendor 1.

Now, with these rounding options, you have the ability to set parameters that dictate: "when doing suggested orders in warehouse 2 (my transfer suggestions only), instead of just ordering in the transfer vendor's buy unit of measure of **CAS**, go

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Field/Function Key	Description
	<p data-bbox="570 306 1398 474">to that transfer vendor's warehouse (warehouse 1 in the Item Balance File record), find its purchasing vendor (vendor 200), and then go to that purchasing vendor's vendor/item record and round up my suggested order quantity to that purchasing vendor's unit of measure (GWB).</p> <hr/> <p data-bbox="570 499 1398 730"><b>Note:</b> There are ten combinations that can occur based on these settings. By having these options set in various combinations, you are provided with the most flexibility in having the system select the best suggested order buy unit of measure/quantity. For a summarization of the results of the ten combinations that are possible, based on these settings, refer to Warehouse Transfer Rounding.</p> <p data-bbox="570 747 834 779"><b>Default Value:</b> Blank</p> <p data-bbox="570 791 1373 856"><b>Valid Values:</b> Transfer Unit Rounding = T, S, N, or I; Buying Unit Rounding = B, S, N, or I</p> <p data-bbox="570 869 1378 934">Recommended Value: <b>S</b> (Smart Unit) for both transfer and buying unit rounding</p> <p data-bbox="570 947 751 978">(A 1) Required</p>

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Field/Function Key	Description
Unit Rounding Settings: <ul style="list-style-type: none"> <li>• Use ___ Months Usage for Existing Products</li> </ul>	<p>Use this field to identify the number of months supply to use when comparing the rounded transfer quantity for existing products to ensure the rounded up quantity doesn't exceed the total usage quantity for this number of months.</p> <p>Existing products are those products that have existed in your inventory longer than the number of months defined for new products in Advance Inventory Management Replenishment Options-Ranking.</p> <p>When the system calculates a rounded transfer unit based on the parameters defined, it will verify that the total usage for the number of months specified in this field is not exceeded by the new package quantity. For example, if the transfer package is rounded to 200, but the total usage for the number of months specified is 180, the transfer amount will not be rounded. The raw (ordered) quantity will be sent.</p> <p>If the product is not new, but has not existed for the number of months supply specified, the system will calculate the average monthly usage for the number of months the product is in existence. Then the average monthly usage will be multiplied by the value in this field to obtain the quantity that will be compared to the rounded transfer amount.</p> <p>Key the number of months usage to use for existing products.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> Greater than zero</p> <p>Recommended Value: 6</p> <p>(N 2,0) Required</p>

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Field/Function Key	Description
Unit Cost Maximum: <ul style="list-style-type: none"> <li>• Extra Qty Cost for New Products cannot exceed</li> <li>• Extra Qty Cost for Existing Products cannot exceed</li> </ul>	<p>Use these fields to set the unit cost maximum parameters.</p> <p><b>Extra Qty Cost for New Products cannot exceed</b>            Key the maximum cost difference allowed when extra quantity is added to a new product to round it up to a transfer or buy unit. If the difference in the cost between the entered (raw) order quantity is greater than this number, no rounding will occur. A product is considered new if it has usage history for less than the number of months entered in the <b>New Products: New if</b> created in last month's field on the <a href="#">Advanced Inventory Management Replenishment Options - Ranking Screen</a>.</p> <p><b>Extra Qty Cost for Existing Products cannot exceed</b>            Key the maximum cost difference allowed when extra quantity is added to an existing product on a warehouse transfer to round it up to a transfer or buy unit. If the difference in the cost between the entered (raw) order quantity is greater than this number, no rounding will occur. Existing products have usage history equal to or greater than the number of months entered in the <b>Use Months Usage for Existing Products</b> field on this screen.</p> <p><b>Default Value:</b> Blank            Recommended Value: 25 for new products; 50 for existing products (N 13,2) Optional</p>
F10=Copy	<p>The <b>F10=COPY</b> function key displays only if you are not performing system level replenishment options and are adding a new record. Press the <b>F10=COPY</b> function key to copy an existing replenishment record to the new record you are creating. The <a href="#">Advanced Inventory Management Replenishment Options - Ranking Copy Screen</a> will appear.</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a>, without saving any additions/changes made to this screen.</p>
F24=Delete	<p>This field displays in Change mode only.</p> <p>Press <b>F24=DELETE</b> twice to delete the parameter record displayed. The <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear and the record will be deleted.</p> <p><b>Note:</b> You must delete higher level option before you can delete a lower-level option. For example, if you are trying to delete Warehouse/Vendor options and have previously entered Warehouse/Vendor/PLine options for the same Warehouse/ Vendor, then you must first delete the Warehouse/Vendor/PLine options for this Warehouse/Vendor.</p>

Field/Function Key	Description
Enter	Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear and your record will be added or changed.

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## Advanced Inventory Management Replenishment Options - Usage Screen

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ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS  Add
Usage
WH:      Vendor:      PLine:      Item Class:  /
Level: System

Default Usage Method:  ..

Seasonal Item Parameters:
Seasonal Trending:      End Date:
Minimum Percent:        Maximum Percent:
Min Hits Last Year:     Min Hits This Year:
Seasonal Line-Up:
Months:                 End Date:
Advance by Lead Time: ..
Exceptional Usage Control:
Action:                 Minimum Qty:
                        Override Percent: Reason? ...
Low Usage Control:
Action:                 Minimum Qty:
                        Override Percent: Reason? ...

F12=Return

```

This screen displays after pressing **F8=USAGE** on the [Advanced Inventory Management Replenishment Options - Option Selection Screen](#).

Use this screen to add, change, or delete the replenishment level considerations related to AIM's usage calculations. Here you define a default usage method, set up seasonal item parameters, and establish rules related to the exceptional usage control and low usage control exceptions.

### Where the Number of Standard Usage Month's is Defined

From most general to most unique, the standard usage month's is defined through:

- AIM System Options Maintenance (MENUAIFILE) - the default value
- AIM Replenishment Options Maintenance (MENU AIFILE) - overrides at the rank level
- Item Balance Maintenance (MENU IAFILE) - overrides at the item/warehouse level

**Note:** If standard usage months is greater than the number of months that the item has been in inventory (the **Date First in Inventory** field from **ITBAL** compared to the current date), then the item's age months will be used as the standard usage months.

### Default Usage Method

The Usage Method determines if an item is seasonal. An item is considered a seasonal item if:

- the **Usage Method** is defined as **T** (Trending Usage Method) in AIM System Options Maintenance (MENU AIFILE), AIM Replenishment Options (MENU AIFILE), or Item Balance Options Maintenance (MENU IAFILE), and
- the item has enough usage history, which is the number of Usage Months for the item plus the number of periods (12 or 13) in the year for the company that controls the warehouse.

If either of the above criteria is not met, the item will be treated as a non-seasonal item, which is defined with a Usage Method of **B** (Backwards Usage Method).

For seasonal items that are calculated using the Trending Usage Method, the usage months will be analyzed prior to the one year look back and the usage months prior to the current month and then determines how the item is trending between these two periods of usage. With the use of this screen, you can set up variables that can then be applied to limit the up/down Trend Percentage that can be applied to an item. The base line for the minimum or maximum percentage comparison is 100%.

Therefore, for example, if an item has a usage months variable defined as 3 and the current month is April, the trend would be calculated using January, February and March of both last year and this year. The trend would then be applied to the calculated usage accumulated going forward from the one year look back period, which would be April, May and June of last year.

## Seasonal Item Parameters

Since seasons can start earlier or later, Seasonal Line-Up variables can also be entered. Use of the **Seasonal Line-Up Months** and **End Date** fields will adjust the start and end of a season. A positive number will start the season earlier; a negative number will start the season later. For example, if the current month is April, and the **Seasonal Line-Up Months** field contains a positive 2 value, the AIM calculation programs would not go back to April of last year, but instead to June of last year. Whereas, a Seasonal Line-Up Months value of negative 2 would cause the calculation programs to go back to February of last year.

The last seasonal item parameter (Advance by Lead Time) is useful for seasonal items that are usually purchased ahead of the season in which they are needed for. Using this field allows you to specify if you want to advance by the lead time that is needed for that item/vendor because you need to buy for the period of time that comes after the lead time. For example, if the current period is April and an item has a usage months variable defined as 3, the AIM calculation programs would normally go back to April of last year and then accumulate the usage for April, May and June. However, if you select to use the Advance by Lead time and the item/vendor has a 90 day lead time, the AIM calculation programs will go back to April of last year, but then advance to July and then accumulate the usage for July, August and September.

A seasonal item can have both the Seasonal Line-Up variables and Advance by Lead Time defined. For example, if the current period is April and an item has a Seasonal Line-Up value of positive 2 and a 90 day Advance by Lead Time, usage will not be accumulated for April, May and June. Instead, usage will be accumulated for September, October and November (April and May are ignored because of the positive 2 Seasonal Line-Up and June, July and August are ignored because of the 90 day Advance by Lead Time). Note that neither of these options adjusts what periods are looked at to determine the trending of an item.

---

## Exceptional Usage Control

The month's usage for an item (found during AIM month-end) determines what type of sales month the item is having (i.e., normal, exceptional, or low). When an exceptionally high usage quantity is found during an AIM month-end, you may want to evaluate the item to determine if that exceptional usage should be noted, via an exception, and/or automatically adjusted (corrected) via an adjustment made to the Item Sales Demand Manual Adjustments File (**ITADJ**).

For an AIM planned item being processed via month-end, if the demand quantity meets the Minimum Qty specified on this screen, the system will calculate an average usage for the item and compare that to the usage being processed via this month-end. If the usage being processed via this month-end exceeds the average usage, then an exception can be generated based on the Exceptional Usage Control: Action flag (refer to this field for complete details).

The exception generated is called the Exceptional Usage Corrected (EUS) and, if not suppressed based on the Action field, can be stored in the AIM Exception Exceptional Usage Correction File (**AIEEUS**). If the option is selected to create an adjustment demand, the demand will be adjusted in the Item Sales Demand Manual Adjustments File (**ITADJ**).

Refer to [CHAPTER 3: AIM Calculations](#) for details on how an item's average usage is determined.

## Low Usage Control

The month's usage for an item (found at AIM month-end) determines what type of sales month the item is having (i.e., normal, exceptional, or low). When an unusually low usage quantity is found during an AIM month-end, you may want to evaluate the item to determine if that low usage should be noted, via an exception, and/or automatically adjusted (corrected) via an adjustment made to the Item Sales Demand Manual Adjustments File (**ITADJ**).

For an AIM planned item being processed via month-end, if the demand quantity meets the **Minimum Qty** specified on this screen, the system will calculate an average usage for the item and compare that to the usage being processed via this month-end. If the usage being processed via this month-end falls below the average usage, then an exception can be generated based on the **Low Usage Control: Action** flag (refer to this field for complete details).

The exception generated is called the Low Usage Corrected (LUS) and, if not suppressed based on the **Action** field, will be stored in the AIM Exception Low Usage Correction File (**AIELUS**). If the option is selected to create an adjustment demand, the demand will be adjusted in the Item Sales Demand Manual Adjustments File (**ITADJ**).

Refer to [CHAPTER 3: AIM Calculations](#) for details on how an item's average usage is determined.

**Note:** Exceptions are generated, if you select to report exceptions via the Action field, based on many different parameters you define. The exception values entered on this screen are used in conjunction with other parameters to determine if and when an exception will occur.

**Note:** (Currently, this note applies only to Seasonal Item parameters). For all numeric fields on this screen, a field exit through the entire field will be treated like no value was entered in the field. If you want to use zero as the value for a field, you must key zero(s) in the field.

**Note:** If you left all fields blank on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining system level options as indicated in the Level field on this screen. If you keyed values on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining unique replenishment options by warehouse, vendor, purchasing line, and optional item class/sub-class.

**Advanced Inventory Management Replenishment Options - Usage Screen Fields and Function Keys**

Field/Function Key	Description
WH	This field displays the warehouse, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Vendor	This field displays the vendor, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
PLine	This field displays the purchasing line, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Item Class	This field displays the item class/sub-class, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display
Level	This field indicates the level of replenishment options you are defining parameters for. Levels are: <ul style="list-style-type: none"> <li>• System</li> <li>• Warehouse</li> <li>• Vendor</li> <li>• Purchasing Line</li> <li>• Item Class</li> </ul> Display

Field/Function Key	Description
Default Usage Method	<p>This field identifies the method that will be used to calculate the usage rate. You will have the option to select either the Backwards Usage Method or the Trending Usage Method. The value entered in this field, if any, will be used as the default method for determining the average monthly usage (AMU) calculations (that is, an item's usage when calculating its AMU). This default value can be overridden at the <b>AIBAL/ITBAL</b> level.</p> <p>The Backwards Usage Method goes backward the number of <b>Usage Months</b> from before the Current Forecast Period, accumulating the usage as it goes backwards.</p> <p>The Trending Usage Method will go back one year (12 months or 13 periods depending on the set up of the company's fiscal year) and then accumulate from that month/period going forward for the number of <b>Usage Months</b>. This type of usage method can also have a calculated Trend Percent applied to it. The starting period (when going back one year) can be adjusted to start earlier or later (by identifying a seasonal line up number of months) depending on how the season appears to be going, and the starting period can be advanced by the lead time.</p> <p>For further details and examples of each Usage Method type, refer to Usage in <a href="#">CHAPTER 28: Maintaining Replenishment Options</a>.</p> <p>Key <b>B</b> for calculating the usage rate based on the Backward Usage Method.</p> <p>Key <b>T</b> for calculating the usage rate based on the Trending Usage Method.</p> <p>Leave blank to use a lower level method for calculating the usage rate. The Replenishment hierarchy will be used to determine the Usage Method. The default Usage Method determined through the hierarchy will be displayed to the right of the field.</p> <p><b>Note:</b> Seasonal items that are using the Trending Usage Method (<b>T</b>) are required to have more than one year of history before an accurate calculation can occur. Meaning, an item with a <b>Usage Months</b> of 3 needs 15 months of history (3 + 12 = 15), and an item with a <b>Usage Months</b> of 4 needs 16 months of history (4 + 12 = 16). This is because the Trending calculation looks at the Usage period that comes before the one year look back and the Usage period that comes before the current month. So, due to this, a seasonal item set to use the Trending Usage Method (<b>T</b>), that does not have enough usage history, will default to a Backward Usage Method (<b>B</b>) in calculations only.</p> <p><b>Valid Values:</b> <b>B, T</b> or leave blank to use a lower level. (A 1) Optional</p>

Field/Function Key	Description
Seasonal Trending - End Date	<p>This field is required if any other Seasonal Trending variables (<b>Minimum Percent</b>, <b>Maximum Percent</b>, <b>Min Hits Last Year</b>, and <b>Min Hits This Year</b>) have been entered at this level and you are not maintaining system level options.</p> <p>Key the date at which Seasonal Trending variables entered at this level will no longer be used. Seasonal Trending variables entered at lower or higher levels that have not yet expired will be used instead.</p> <p><b>Note:</b> Seasonal Trending variables and/or Seasonal Line-Up variables are only selected to be retrieved by the system for seasonal items, if an end date has not been keyed in this field or it has not yet expired, if one was keyed.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> Key the date using the <b>Default Date Format</b> for this user, specified through Register User IDs (MENU XACFIG), or if that field is blank, key the date using the system's <b>Default Date Format</b> specified through System Options Maintenance (MENU XAFIELD).</p> <p>Recommended Value: Blank</p> <p>(N 6,0) Required/Optional</p>
Seasonal Trending - Minimum Percent	<p>Key the minimum Trend Percentage to be applied to the item. The calculated Trend Percent cannot fall below this value.</p> <p>The base line for the minimum percentage comparison is 100%. Therefore, for example, if an item has a usage months variable defined as 3 and the current month is April, the trend would be calculated using January, February and March of both last year and this year. The trend would then be applied to the calculated usage accumulated going forward from the one year look back period, which would be April, May and June of last year.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: 50</p> <p>(N 5,2) Optional</p>

Field/Function Key	Description
Seasonal Trending - Maximum Percent	<p>Key the maximum Trend Percentage to be applied to the item. This value must be greater than the <b>Minimum Percent</b> field. The calculated Trend Percent cannot exceed this value.</p> <p>The base line for the maximum percentage comparison is 100%. Therefore, for example, if an item has a usage months variable defined as 3 and the current month is April, the trend would be calculated using January, February and March of both last year and this year. The trend would then be applied to the calculated usage accumulated going forward from the one year look back period, which would be April, May and June of last year.</p> <p><b>Default Value:</b> Blank Recommended Value: 150 (N 5,2) Optional</p>
Seasonal Trending - Min Hits Last Year	<p>This field is required at the system level.</p> <p>Key the minimum number of line hits last year (within the Usage Months time frame) before a Trend Percent will be calculated.</p> <p>Line hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction (deleted order/line), regardless of quantity.</p> <p><b>Default Value:</b> Blank Recommended Value: 10 (N 9,0) Required/Optional</p>
Seasonal Trending - Min Hits This Year	<p>This field is required at the system level.</p> <p>Key the minimum number of line hits this year (within the Usage Months time frame) before a Trend Percent will be calculated.</p> <p>Line hits are the number of times a product appears on a sales order, warehouse transfer, or lost business transaction (deleted order/line), regardless of quantity.</p> <p><b>Default Value:</b> Blank Recommended Value: 10 (N 9,0) Required/Optional</p>

Field/Function Key	Description
Seasonal Line-Up - Months	<p>This field adjusts the start of a season (i.e., the starting period for usage accumulation).</p> <p>Key the number of months (either a positive or negative value) that the starting period (season) used for calculating the average monthly usage (AMU) will be adjusted. This field does not impact the Trend Percent calculation.</p> <p>A positive value will start the season earlier (increases the starting period). A negative value will start the season later (decreases the starting period). The value in either direction (positive or negative) cannot exceed 3 months.</p> <p><b>Example:</b> If the current month is April, and the <b>Seasonal Line-Up Months</b> field contains a positive 2 value, the AIM calculation programs would not go back to April of last year, but instead to June of last year. Whereas, a <b>Seasonal Line-Up Months</b> value of negative 2 would cause the calculation programs to go back to February of last year.</p> <p><b>Default Value:</b> Blank</p> <p>Recommended Value: Blank</p> <p>(N 2,0) Optional</p>
Seasonal Line-Up - End Date	<p>This field is required if any other Seasonal Line-Up variables (<b>Months and Advance by Lead Time</b>) have been entered at this level and you are not maintaining system level options.</p> <p>This field adjusts the end of a season.</p> <p>Key the date at which Seasonal Line-Up variables entered at this level will no longer be used. Seasonal Line-Up variables entered at lower or higher levels that have not yet expired will be used instead.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> Key the date using the <b>Default Date Format</b> for this user, specified through Register User IDs (MENU XACFIG), or if that field is blank, key the date using the system's <b>Default Date Format</b> specified through System Options Maintenance (MENU XAFIELD).</p> <p>Recommended Value: Blank</p> <p>(N 6,0) Required/Optional</p>

Field/Function Key	Description
Advance by Lead Time	<p>This field can be used to adjust the season starting point (i.e., starting period for usage accumulation) to be later. This field is useful for those seasonal items that are usually purchased ahead of the season in which they are needed for. You can specify if you want to advance by the lead time that is needed for that item/vendor because you need to buy for the period of time that comes after the lead time.</p> <p>Key <b>Y</b> to have the season (starting period) adjusted by the lead time for the Advanced Inventory Management Balance File (<b>AIBAL</b>) record. The lead time of the item will be used to extend the starting period, and the minimum number of line hits last year (within the Usage Months time frame) before a Trend Percent will be calculated.</p> <p>Key <b>N</b> if you do not want the season adjusted by the lead time.</p> <p><b>Example:</b> If the current period is April and the item's usage months variable is 3, the AIM calculation programs would normally go back to April of last year and then accumulate the usage for April, May and June. However, if you select to use the Advance by Lead time option (i.e., key <b>Y</b> in this field) and the item/vendor has a 90 day lead time, the AIM calculation programs will go back to April of last year, but then advance to July and then accumulate the usage for July, August and September.</p> <p>Refer to Advance by Lead Time for additional calculation information.</p> <p><b>Valid Values:</b> Y, N or Blank</p> <p>Recommended Value: Blank (which will use another level)</p> <p>(A 1) Optional</p>

Exceptional Usage Control Action

This field determines what action will be taken when an Exceptional Usage Control Exception (issue) occurs. That is, do you want to be notified if the usage being processed via this AIM month-end exceeds the average usage. A month's usage is considered exceptional if the last month's usage (found at AIM month-end) is greater than the average of the prior number of usage months (that is, it exceeds the item's normal usage).

Key **R** (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Exceptional Usage Correction File (**AIEEUS**), and will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is **Exceptional Usage Corrected** (EUS).

Key **S** (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Exceptional Usage Correction File (**AIEEUS**), and will not be available for review in the Exception Center in ICC.

Key **C** (Correct) if you want an automatic correction to occur instead of an exception being generated for review. An actual adjustment will be made to the Item Sales Demand Manual Adjustments File (**ITADJ**) to reduce the exceptional quantity to a more reasonable quantity, which the system calculates as: Average Usage multiplied by the **Override Percent** value keyed on this screen. The calculation for a correction is as follows:

**Calculation: Total Average Prior Month's Usage \* Usage Multiplier = Override Usage**

For example, if the average usage was 100, and this exceptional usage was 1000, and the **Override Percent** value is 10%, the system would calculate the reasonable usage as  $100 * 10\% = 110$ , and would then generate an adjustment of 890 to decrease the 1000 back to 110. If the demand adjustment is generated, the Usage Override Reason Code identified on this screen in the **Reason** field will be assigned to that adjustment entry.

Key **B** (Both Report and Correct) to have this type of exception generated (an exception will be written to the AIM Exception Exceptional Usage Correction File (AIEEUS) and will be available for review in the Exception Center in ICC), and have an automatic correction occur to the Item Sales Demand Manual Adjustments File (**ITADJ**).

**Important**

If this field is set to **C** (Correct) or **B** (Both) a Demand Adjustment will be created to account for the exceptional usage during the AIM Monthly Update (MENU AIMAST). Therefore, the usage for

Field/Function Key	Description
	<p>the current month will be reduced to the total average usage, multiplied by the usage multiplier defined on this screen.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the Replenishment hierarchy to determine if this type of exception will be reported or suppressed.</p> <p><b>Note:</b> Exceptional Usage Adjustments (made either manually or automatically based on your reply in this field) should be reviewed/considered carefully. Not accounting for exceptional usage could increase your calculated AMU, forecast, etc. and you may want to adjust out such exceptional usage in order to ensure optimal inventory levels. If interested in exceptional usage adjustments, it is recommended that prior to the system ever making any adjustments automatically, that you first monitor (report only) system suggested adjustments for a period of time so you can evaluate the suggested adjustment quantities. If you are satisfied with the suggested adjustment quantities, you can use those numbers to manually make the adjustments. Since the recommended adjustment quantity is based on both quantity and percent factors you identify at a variety of levels, you may need to tweak/change the applicable options to get the suggested adjustment quantities in line with your desired optimum levels. Once you are satisfied with the exceptional adjustment quantities being suggested, then you could set the flag to have the system perform the adjustments automatically for you; but be sure to continue to monitor/ evaluate them, as tweaking may occasionally still need to be performed based on changing circumstances.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> R, S, C, B, or blank</p> <p>Recommended Value: S</p> <p>(A 1) Optional</p>

Field/Function Key	Description
Exceptional Usage Control - Minimum Qty	<p>This field determines the minimum quantity of usage that must be met during the past month for the system to evaluate the item for exceptional usage. That is, for an AIM planned item being processed via month-end, if the demand quantity of the item meets the <b>Minimum Qty</b> specified in this field, the system will calculate an average usage for the item and compare that to the usage being processed via this month-end. If the usage of the item being processed via this month-end exceeds the average usage, then an exception can be generated based on the <b>Exceptional Usage Control: Action</b> flag (refer to this field for complete details).</p> <p>Key the minimum quantity value.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-999999999, or 0 if <b>Action</b> field is not <b>R, B</b> or <b>C</b></p> <p>Recommended Value: Blank</p> <p>(N 9,0) Optional</p>
Exceptional Usage Control - Override Percent	<p>If the <b>Action</b> field is set to either <b>C</b> (Correct) or <b>B</b> (Both), the percent identified here will be applied to the item's average usage to arrive at an adjustment value to reduce the exceptional usage.</p> <p>For example, you might want to bring any exceptional usage values back down to only be 10% above average, so you would key 10 in this field.</p> <p>Key the override percentage.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-999.99, or 0 if <b>Action</b> field is not <b>R, B</b> or <b>C</b></p> <p>Recommended Value: Blank if suppressed; otherwise, if not suppressed, 120%</p> <p>(N 5,2) Optional</p>

Field/Function Key	Description
Exceptional Usage Control - Reason	<p>Use this field to identify a default reason of the usage override to be used when the <b>Exceptional Usage Control Action</b> field is <b>C</b> or <b>B</b> and an adjustment is being written to the Item Sales Demand Manual Adjustments File (<b>ITADJ</b>).</p> <p>Note that when keying a manual adjustment (via Interactive Forecasting MENU AIMAIN), you will be able to identify a reason for the adjustment to track why that adjustment is being made. However, since the exceptional usage adjustment will be performed automatically by the system, there is no opportunity for you to identify a reason. Therefore, by providing a reason code here, the system will have a default reason to use whenever an exceptional usage adjustment is made.</p> <p>If the <b>Exceptional Usage Control Action</b> field is <b>C</b> or <b>B</b>, the reason code description will be used for the demand adjustment.</p> <p>Key the usage override reason code.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> A reason code defined through AIM Usage Override Reason Codes Maintenance (MENU AIFILE).</p> <p>Recommended Value: Blank</p> <p>(A 2) Optional</p>

Low Usage Control -  
Action

This field determines what action will be taken when a Low Usage Control Exception (issue) occurs. That is, do you want to be notified if the usage being processed via this AIM month-end falls below the average usage. A month's usage is considered below the average usage if the last month's usage (found at AIM month-end) is less than the total of the prior number of usage months (that is, it is less than the item's normal usage).

Key **R** (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Low Usage Correction File (**AIELUS**), and will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Low Usage Corrected (LUS).

Key **S** (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Low Usage Correction File (AIELUS), and will not be available for review in the Exception Center in ICC.

Key **C** (Correct) if you want an automatic correction to occur (instead of an exception being generated for review) to the order point and line point quantities when an occurrence of this exception is found. That is, an actual adjustment will be made to the Item Sales Demand Manual Adjustments File (**ITADJ**) to increase a low quantity to a more reasonable quantity, which the system calculates as: Average Usage multiplied by the Override Percent value keyed on this screen.

**Example:** If the average usage was 100, and this exceptional usage was 10, and the **Override Percent** value is 10%, the system would calculate the reasonable usage as  $100 * 10\% = 110$ , and would then generate an adjustment of 100 to increase the 10 back to 110. If the demand adjustment is generated, the Usage Override Reason Code identified on this screen in the **Reason** field will be assigned to that adjustment entry.

Key **B** (Both Report and Correct) to have this type of exception generated (an exception will be written to the AIM Exception Exceptional Usage Correction File (**AIEEUS**) and will be available for review in the Exception Center in ICC), and have an automatic correction occur to the order point and line point quantities, when applicable, in the Item Sales Demand Manual Adjustments File (**ITADJ**).

**Important**

If this field is set to **C** (Correct) or **B** (Both) a Demand Adjustment will be created to account for the low usage during the AIM Monthly Update (MENU AIMAST). Therefore, the usage for the

Field/Function Key	Description
	<p>current month will be increased to the total average usage, multiplied by the usage multiplier defined on this screen.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the <a href="#">Replenishment hierarchy</a> to determine if this type of exception will be reported or suppressed.</p> <p><b>Note:</b> Low Usage Adjustments (made either manually or automatically based on your reply in this field) should be reviewed/considered carefully. Not accounting for low usage numbers could lower your calculated AMU, forecast, etc. and you may want to adjust in some minimum usage numbers to ensure optimal inventory levels. If interested in low usage adjustments, it is recommended that prior to the system ever making any adjustments automatically, that you first monitor (report only) system suggested adjustments for a period of time so you can evaluate the suggested adjustment quantities. If you are satisfied with the suggested adjustment quantities, you can use those numbers to manually make the adjustments. Since the recommended adjustment quantity is based on both quantity and percent factors you identify at a variety of levels, you may need to tweak/change the applicable options to get the suggested adjustment quantities in line with your desired optimum levels. Once you are satisfied with the low usage adjustment quantities being suggested, then you could set the flag to have the system perform the adjustments automatically for you; but be sure to continue to monitor/evaluate them, as tweaking may occasionally still need to be performed based on changing circumstances.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> R, S, C, B, or blank</p> <p>Recommended Value: S</p> <p>(A 1) Optional</p>

Field/Function Key	Description
Low Usage Control - Minimum Qty	<p>This field determines the minimum quantity of usage that will be looked at when the system is reviewing previous usage data to see if that data was outside of the <b>Minimum Qty</b> value (entered in this field) in order for a comparison to be performed and an exception generated. That is, for an AIM planned item being processed via month-end, if the usage being processed via this month-end falls below the average usage, then an exception can be generated based on the <b>Low Usage Control: Action</b> flag (refer to this field for complete details).</p> <p>Key the minimum quantity value.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-999999999, or 0 if <b>Action</b> field is not <b>R</b>, <b>B</b> or <b>C</b></p> <p>Recommended Value: Blank</p> <p>(N 9,0) Optional</p>
Low Usage Control - Override Percent	<p>If it is determined that an items usage (being processed via month-end) falls below the average usage, you can use this field to manually key in a percentage amount that you now want to use based on the usage that was considered low.</p> <p>Key the override percentage.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-999.99, or 0 if <b>Action</b> field is not <b>R</b>, <b>B</b> or <b>C</b></p> <p>Recommended Value: Blank if suppressed; otherwise, if not suppressed, 120%</p> <p>(N 5,2) Optional</p>
Low Usage Control - Reason	<p>Use this field to identify the reason of the usage override (and possible correction).</p> <p>Key the usage override reason code.</p> <p>If the <b>Low Usage Control Action</b> field is <b>C</b> or <b>B</b>, the reason code description will be used in demand adjustment.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> A reason code defined through AIM Usage Override Reason Codes Maintenance (MENU AIFILE).</p> <p>Recommended Value: Blank</p> <p>(A 2) Optional</p>
F10=Copy	<p>The <b>F10=COPY</b> function key displays only if you are not performing system level replenishment options, and are adding a new record.</p> <p>Press the <b>F10=COPY</b> function key to copy an existing replenishment record to the new record you are creating. The <a href="#">Advanced Inventory Management Replenishment Options - Ranking Copy Screen</a> will appear.</p>

Field/Function Key	Description
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> , without saving any additions/changes made to this screen.
F24=Delete	<p>This field displays in Change mode only.</p> <p>Press <b>F24=DELETE</b> twice to delete the parameter record displayed. The <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear and the record will be deleted.</p> <p><b>Note:</b> You must delete higher level option before you can delete a lower level option. For example, if you are trying to delete Warehouse/Vendor options and have previously entered Warehouse/Vendor/PLine options for the same Warehouse/ Vendor, then you must first delete the Warehouse/Vendor/PLine options for this Warehouse/Vendor.</p>
Enter	Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear and your record will be added or changed.

## Advanced Inventory Management Replenishment Options - Exceptions Screen

```

ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS  Change
Exceptions
WH:      Vendor:      PLine:      Item Class:  /
Level: System
Currency: USD US Dollars

Threshold Low Activity:
Action:  B      Months to Compare: .3      Total Hits Less Than: .....20
Wait Mths: .3      Min Qty Chg%: .25.00      Minimum Qty Change: .....100
OP/LP Override Ready to Expire:
Action: R      Maintenance Code: 9
Products With Hits:
Months to Use: 12      Hits Greater Than: .....20      Discontinued Action: R
Stocked With Zero OP/LP Action: R      Non-Stocked Action: R
Inventory Value Change:
Threshold Action: R      ASQ Action: R      5-Hi Action: R      LUA Action: R
Forecast Accuracu:
Action: R      Qty Change Percent: .25.00      Qty Change: .....100      Wait Days: 21
Hits Greater Than: .....20      Unit Cost Greater Than: .....1200.000000 US$

F12=Return  F24=Delete
    
```

This screen displays after pressing **F9=EXCEPTIONS** on the [Advanced Inventory Management Replenishment Options - Option Selection Screen](#).

Use this screen to add, change, or delete exception parameters. Exception parameters allow you to define rules for when exceptions could occur. Exceptions notify you of conditions that require review, or where ordering controls were automatically adjusted.

### Threshold Low Activity Exceptions

Threshold is a way to set a specific minimum order point so that if the calculated order point does not meet this user-defined minimum, the order point will be adjusted up to this minimum (defined on the AIM Information Ordering Screen in Item Balance Maintenance (MENU IAFILE)). A description, as well as entry date (when the threshold value was entered) and expiration date (when the threshold value should no longer apply) for this minimum may also be provided.

There are, however, some threshold low activity parameters that can be set (to see how sales data compares against these parameters) in order to capture these threshold order point adjustments as exceptions when they occur for items with the following conditions:

- Items must have an order point defined
- Items must have an order point adjusted by the threshold
- Items must have total hits less than a minimum number of hits specified (see **Total Hits Less Than** field) for a pre-defined number of months (see **Months to Compare** field)

- Items where the threshold quantity change (between the normally calculated order point and the minimum threshold to which it was adjusted) exceeds a specified minimum quantity percent (see **Min Qty Chg %** field) and exceeds a specified minimum quantity number (see **Minimum Qty Change** field)
- Items where the current date when compared to the threshold's entered date ensures the waiting period months defined (see **Wait Mths** field) has passed (to prevent newly assigned thresholds from throwing exceptions)

In these cases, an exception called the Threshold With Low Activity (TLA) can be generated and stored in the AIM Exception Threshold Low Activity Exception File (**AIETLA**), based on the **Threshold Low Activity: Action** flag of **R** for Report.

## OP/LP Override Ready to Expire Exceptions

If either an item's order point (OP) or line point (LP) has been manually overridden with a maintenance code of **1-9** (on the AIM Information Screen in Item Balance Maintenance (MENU IAFILE)), each AIM month-end process decrements that code until eventually it hits **0**, and at that time, it reverts back to **A** (Automatic). You may want to be notified, via an exception, when items reach a certain maintenance code. By identifying that desired maintenance code in the **OP/LP Override Ready to Expire: Maintenance Code** field, AIM month-end can create an exception for each item with that maintenance code specified for either its OP or LP.

In these cases, an exception called the *Overridden Product about to Reset* (OPR) can be generated and stored in the AIM Exception OP/LP Override Exception File (**AIEOPR**), based on the **OP/LP Override Ready to Expire: Action** flag of **R** for Report.

## Products With Hits Exceptions

For items that are considered discontinued or non-stock, and for items which have zero manually assigned as both the order point (OP) and line point (LP), you may still want to be notified via an exception if the item is getting any 'hits'. Such notifications serve to prompt you to re-evaluate the setup of those items to see if any of those settings should be changed. Therefore, at AIM month-end, if the item has at least one hit in the month being closed, and it meets or exceeds the quantity in the **Hits Greater Than** field during the past number of months specified in the **Months to Use** field, then an exception can be generated.

In these cases, possible exceptions called the Stocked Product Zero OP/LP With Hits (PWS), Discontinued Product With Hits (PWD), or Non-Stock Product With Hits (PWN) can be generated, based on the **Action** flags of **R** for Report, and stored in the applicable file:

- AIM Exception Products with Hits- Stock with zero OP/LP Exception File (**AIEPWS**)
- AIM Exception Products with Hits- Discontinued Exception File (**AIEPWD**)
- AIM Exception Products with Hits- Non-stock Exception File (**AIEPWN**)

Note that because discontinued and/or non-stock items may not normally be planned, the AIEPWD and AIEPWN exceptions for these types of items are generated even if the Plan flag in IAFILE Item Balance Maintenance is set to **N**. Therefore, for the purposes of the Discontinued Product With Hits

(PWD) exception, an item is considered discontinued if the **Discontinued** flag is set to **Y** in IAFILE Item Balance Maintenance (or, if no flag set there, in Item Master Maintenance), regardless of the **Plan** flag; for the purposes of the *Non-Stock Product With Hits* (PWN) exception, an item is considered not stocked if the **Update Inventory** flag is set to **N** in IAFILE Item Master Maintenance, or if the **Plan** flag is set to **N** in IAFILE Item Balance Maintenance. By treating all items not planned as if they are non-stock, all non-planned items (except those tracked in the discontinued AIEPWD file based on the discontinued flag) can be tracked for hits.

## Inventory Value Change Exceptions

For AIM planned items, when an item's order point (OP) is calculated, the normal calculation is:

**Calculation: Order Point = [ (AMU / Avg Mth Days = ADU) \* Lead Time] + Safety where  
AMU = usage over time period / usage months**

There are four order point adjusters [Threshold, ASQ, 5HI, and Low Usage Adjuster (LUA)] that allow the changing or adjusting of that normally calculated order point in AIM, if the item's order point has a maintenance code of **A** (Automatic). If using one or more of the Threshold, ASQ, or 5HI methods, the system would calculate an item's OP not only using the normal calculation but also by using those selected adjuster methods. Once all the calculations are performed, the system would determine which calculation resulted in the highest OP and would assign that highest OP to the item and would display which adjuster had been used. If using the Low Usage Adjuster (LUA), an order point that is calculated to zero (due to the low usage of an item) can be adjusted to an order point of **1**.

If any OP adjuster is assigned to an item, an exception can be generated and stored in the applicable exemption file, based on the **Action** field. Depending on how the order point was adjusted (Threshold, ASQ, 5HI, or LUA), an Inventory Value Change Exception can be generated in the appropriate file:

- AIM Exception Inventory Value Change - Threshold (**AIEIVT**)
- AIM Exception Inventory Value Change - ASQ (**AIEIVA**)
- AIM Exception Inventory Value Change - 5HI (**AIEIVF**)
- AIM Exception Inventory Value Change - LUA (**AIEIVL**)

Possible exceptions which can be generated are:

- *Inventory Value Change (ASQ) (IVA)*
- *Inventory Value Change (5HI) (IVF)*
- *Inventory Value Change (LUA) (IVL)*
- *Inventory Value Change (Threshold) (IVT)*

If an exception is generated and reported, then in the Exception Center in the Inventory Control Center (ICC), important data will be available to allow you to view the total inventory value changed, including the total dollars (currency) difference between the normally calculated order point value (raw order point) and the adjusted order point value.

## Forecast Accuracy Exceptions

An item's average monthly usage (AMU) (as seen in Item Balance Maintenance (MENU IAFILE)) is calculated at month-end (among other places) and represents the quantity expected for an item's usage for the month (e.g., assume 30). At some given point during the month (at least 7 days after the last AIM month-end is recommended), you may want to evaluate what your usage is so far to see if you are still on track to meet that AMU (e.g., the 30 quantity). For example, you may want to evaluate 13 days (**Wait Days** field) after your last AIM month-end to see how your usage so far matches up to that previously calculated AMU. By entering 13 days, for example, as your **Wait Days**, you will ensure that during the next day-end run that occurs on or after that 13th day since your last AIM month-end, the system will review the month-to-date usage of your AIM planned item(s) and based on that usage, calculate what it thinks you might use for the rest of the month to see if that previously calculated AMU needs to be reviewed. For example, assume you have used 10 so far this month and during this evaluation, the system calculates a value of only 12 more to be used. In this example, the system will then add the 10 used so far and the 12 expected to be used to arrive at a total of 22 for the month. This value (e.g., 22) is then compared to the AMU (which we originally said was 30) that was calculated at the last AIM month-end. If the quantity difference between the two (in our example  $30-22=8$ ) meets the minimum quantity number you key in the **Qty Change** field and this quantity difference is at least the percentage you specify in the **Qty Change Percent** field, then an exception called the Forecast Accuracy (FCA) can be generated and stored in the AIM Exception **Forecast Accuracy** File (AIEFCA), based on the **Forecast Accuracy: Action** flag of **R** for Report. Note that this evaluation will only be performed for items whose cost (replenish or replacement cost - see note below) is greater than or equal to the cost you specify in the **Unit Cost Greater Than** field.

**Note:** For regular purchasing vendors, the Vendor/Item/Price File cost (converted to the correct unit of measure for which the AIBAL information is being presented) will be used for replacement cost. If no Vendor/Item/Price record exists, then the std/ avg/user cost (converted to the correct unit of measure for which the AIBAL information is being presented) from this warehouse will be used, based on this warehouse's company's options in Order Entry Options Maintenance (MENU XAFILE). For transfer vendors, Purchasing Options Maintenance (MENU POFILE) determines which price/cost value will be used. If no Vendor/Item record exists, it uses the **Cost to be Used GL** field (e.g., std/avg/user) in Order Entry Options Maintenance to select the cost from the item's ITBAL, converted to the correct unit of measure.

**Note:** If you left all fields blank on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining system level options as indicated in the Level field on this screen. If you keyed values on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining unique replenishment options by warehouse, vendor, purchasing line, and optional item class/sub-class.

### Advanced Inventory Management Replenishment Options - Exceptions Screen Fields and Function Keys

Field/Function Key	Description
WH	This field displays the warehouse, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> . Display

Field/Function Key	Description
Vendor	<p>This field displays the vendor, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a>.</p> <p>Display</p>
PLine	<p>This field displays the purchasing line, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a>.</p> <p>Display</p>
Item Class	<p>This field displays the item class/sub-class, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a>.</p> <p>Display</p>
Level	<p>This field indicates the level of replenishment options you are defining lead time parameters for. Levels are:</p> <ul style="list-style-type: none"> <li>• System</li> <li>• Warehouse</li> <li>• Vendor</li> <li>• Purchasing Line</li> <li>• Item Class</li> </ul> <p>Display</p>
Currency	<p>If a warehouse has been entered, this field displays the currency of the company that controls the warehouse.</p> <p>If a warehouse has not been entered, this field displays the default local currency.</p> <p>Display</p>

Field/Function Key	Description
Threshold Low Activity - Action	<p>This field determines what action will be taken when a Threshold Low Activity Exception (issue) occurs. That is, do you want to be notified when threshold order point adjustments occur.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the (AIM Exception Threshold Low Activity) Exception File (<b>AIETLA</b>), and will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Threshold Low Activity (TLA).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the (AIM Exception Threshold Low Activity) Exception File (<b>AIETLA</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the Replenishment hierarchy to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> R, S or blank <b>Recommended Value:</b> R (A 1) Required</p>
Threshold Low Activity - Months to Compare	<p>Threshold low activity parameters can be set to capture threshold order point adjustments as exceptions when they occur for items that match the values you key in the Threshold Low Activity fields. See <a href="#">Threshold Low Activity Exceptions</a> for the conditions that must be met in order for an exception to occur.</p> <p>Use this field to identify how many months should be looked at to collect and calculate the number of hits that can then be compared to the number of hits in the <b>Total Hits Less Than</b> field to see if this item's hits are less than this value (this is one requirement in order for the Threshold Low Activity Exception to occur). For example, items must have total hits less than a minimum number of hits specified (in the <b>Total Hits Less Than</b> field) for a pre-defined number of months entered in this field in order to qualify for an exception.</p> <p>Key the number of months (time frame) that will be used for the threshold low activity comparison.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> 1-99, or 0 if <b>Action</b> field is not R <b>Recommended Value:</b> 12 (N 2,0) Required</p>

Field/Function Key	Description
Threshold Low Activity - Total Hits Less Than	<p>Threshold low activity parameters can be set to capture threshold order point adjustments as exceptions when they occur for items that match the values you key in the Threshold Low Activity fields. See <a href="#">Threshold Low Activity Exceptions</a> for the conditions that must be met in order for an exception to occur.</p> <p>Use this field to identify the limit for the number of hits that must be found in the months reviewed (based on the value in the <b>Months to Compare</b> field) in order for the Threshold Low Activity Exception to occur. The hits found in that time frame must total less than the value you key in this field.</p> <p>Key the total hits less than number.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-999999999, or 0 if <b>Action</b> field is not <b>R</b></p> <p>Recommended Value: 3</p> <p>(N 9,0) Required</p>
Threshold Low Activity - Wait Mths	<p>Threshold low activity parameters can be set to capture threshold order point adjustments as exceptions when they occur for items that match the values you key in the Threshold Low Activity fields. See <a href="#">Threshold Low Activity Exceptions</a> for the conditions that must be met in order for an exception to occur.</p> <p>Use this field to identify the wait period before exceptions can be generated. This is useful for new products, since a threshold is normally placed on an item that is new and does not have any history yet in order to accurately determine an item's order point (which will expire after a certain time when the product should then have enough history to calculate an accurate order point).</p> <p>This prevents an item from being overridden for possibly too long (bringing in more inventory than needed because the threshold increased the order point) if its actual sales were not in sync with the expectation of the threshold.</p> <p>Key the wait months. The system will wait this number of months before checking if the item is on track, to prevent newly assigned thresholds from generating exceptions. The system ensures that the time between the threshold entry date and today's date has been met or exceeded by this wait months period before checking if the Threshold Low Activity Exception will be generated.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-99, or 0 if <b>Action</b> field is not <b>R</b></p> <p>Recommended Value: 2</p> <p>(N 2,0) Required</p>

Field/Function Key	Description
Threshold Low Activity - Min Qty Chg %	<p>This field is used to identify the minimum quantity change percent that must be met when the threshold was applied and adjusted the order point, in order to generate the Threshold Low Activity Exception.</p> <p>Key the minimum quantity change percent. Items where the threshold quantity change (between the normally calculated order point and the minimum threshold to which it was adjusted) exceed the minimum quantity change percent value keyed in this field and exceed the specified minimum quantity change value in the <b>Minimum Qty Change</b> field will generate an exception.</p> <p><b>Calculation:</b> The Quantity Change is calculated by:  the Original Order Point less the Threshold</p> <p><b>Calculation:</b> The Quantity Change percent is calculated by:  the Quantity Change divided by the Threshold multiplied by 100</p> <p><b>Default Value:</b> Blank  <b>Valid Values:</b> 1-999.99, or 0 if <b>Action</b> field is not <b>R</b>  Recommended Value: 5  (N 5,2) Required</p>
Threshold Low Activity - Minimum Qty Change	<p>This field is used to identify the minimum quantity change that must be met when the threshold was applied and adjusted the order point, in order to generate the Threshold Low Activity Exception.</p> <p>Key the minimum quantity change value. Items where the threshold quantity change (between the normally calculated order point and the minimum threshold to which it was adjusted) exceed the specified minimum quantity change value keyed in this field and exceed the specified minimum quantity change percent in the <b>Minimum Qty Chg %</b> field will generate an exception.</p> <p><b>Default Value:</b> Blank  <b>Valid Values:</b> 1-999999, or 0 if <b>Action</b> field is not <b>R</b>  Recommended Value: 6  (N 5,0) Required</p>

Field/Function Key	Description
OP/LP Override Ready to Expire - Action	<p>This field determines what action will be taken when an Order Point/Line Point Override Ready to Expire Exception (issue) occurs. That is, you may want to be notified, via an exception, when items reach a certain maintenance code. By identifying that desired maintenance code in the OP/LP Override <b>Ready to Expire: Maintenance Code</b> field, AIM month-end can create an exception for each item with that maintenance code specified for either its order point or line point.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception OP/LP Override Exception File (<b>AIEOPR</b>), and will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Overridden Product about to Reset (OPR).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception OP/LP Override Exception File (<b>AIEOPR</b>), and will not be available for review in the Exception Center in ICC.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> R or S <b>Recommended Value:</b> R                      (A 1) Required</p>
OP/LP Override Ready to Expire - Maintenance Code	<p>If either an item's order point (OP) or line point (LP) has been manually overridden with a maintenance code of <b>1-9</b> (number of months) on the AIM Information Screen in Item Balance Maintenance (MENU IAFILE), each AIM month-end process decrements that code until eventually it hits <b>0</b>, and at that time, it reverts back to <b>A</b> (Automatic). You may want to be notified, via an exception, when items reach a certain maintenance code (or number of months remaining) and are close to being expired. By identifying that desired maintenance code in this field, AIM month-end can create an exception for each item with that maintenance code specified for either its OP or LP.</p> <p>Key the desired maintenance code. Exceptions will be generated for those items that have this number of months remaining.</p> <p><b>Default Value:</b> Blank  <b>Valid Values:</b> 1-9                      Recommended Value: 2 (2 month end cycles)                      (A 1) Required</p>

Field/Function Key	Description
Products With Hits - Months to Use	<p>For items considered discontinued [flagged as <b>Discontinued</b> in Item Master Balance Maintenance (MENU IAFILE), or, if no flag there, in Item Master Maintenance (MENU IAFILE)], or for items considered non-stock items [flagged as Update <b>Inventory = N</b> in Item Master Maintenance (MENU IAFILE) or items flagged as <b>Plan = N</b> in Item Balance Maintenance (MENU IAFILE)], or for items that have both the order point (OP) and line point (LP) manually overridden to zeros, you may want to be notified, via an exception, if the items are getting 'hits'. Such notifications serve to prompt you to re-evaluate the setup of those items to see if any of those settings should be changed. Therefore, at AIM month-end, if the item has at least one hit in the month being closed, and it meets or exceeds the quantity in the <b>Hits Greater Than</b> field during the past number of months specified in this field, then an exception can be generated.</p> <p>Key the past number of months during which hits will be analyzed.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> a value not greater than 12</p> <p>Recommended Value: 3</p> <p>(N 2,0) Required</p>
Products With Hits - Hits Greater Than	<p>For items considered discontinued [flagged as <b>Discontinued</b> in Item Master Balance Maintenance (MENU IAFILE), or, if no flag there, in Item Master Maintenance (MENU IAFILE)], or for items considered non-stock items [flagged as <b>Update Inventory = N</b> in Item Master Maintenance (MENU IAFILE) or items flagged as <b>Plan = N</b> in Item Balance Maintenance (MENU IAFILE)], or for items that have both the order point (OP) and line point (LP) manually overridden to zeros, you may want to be notified, via an exception, if the items are getting 'hits'.</p> <p>Such notifications serve to prompt you to re-evaluate the setup of those items to see if any of those settings should be changed. Therefore, at AIM month-end, if the item has at least one hit in the month being closed, and it meets or exceeds the quantity in this field during the number of months specified in the <b>Months to Use</b> field, then an exception can be generated.</p> <p>Key the hits greater than number.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-999999999, or 0 if <b>Action</b> field is not <b>R</b></p> <p>Recommended Value: 2</p> <p>(N 9,0) Required</p>

Field/Function Key	Description
Products With Hits - Discontinued Action	<p>This field determines what action will be taken when a Products With Hits Discontinued Action Exception (issue) occurs.</p> <p>The value entered here determines if and how you will be notified via this exception if hits occur for items flagged as <b>Discontinued</b> in Item Balance Maintenance (MENU IAFILE), or, if no flag there, in Item Master Maintenance (MENU IAFILE), regardless of the <b>Plan</b> flag in Item Balance Maintenance (MENU IAFILE).</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Products with Hits-Discontinued Exception File (<b>AIEPWD</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Discontinued Product With Hits (PWD).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Products with Hits-Discontinued Exception File (<b>AIEPWD</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the Replenishment hierarchy to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> R, S or blank  <b>Recommended Value:</b> R</p> <p>(A 1) Required</p>

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Field/Function Key	Description
Products With Hits - Stocked With Zero OP/LP Action	<p>This field determines what action will be taken when a Products With Hits Stocked With Zero Order Point/Line Point Action Exception (issue) occurs.</p> <p>The value entered here determines if and how you will be notified via this exception if hits occur for items that have both the order point (OP) and line point (LP) manually overridden to zeros in Item Master Maintenance (MENU IAFILE).</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Products with Hits-Stock with zero OP/LP Exception File (<b>AIEPWS</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is <b>Stocked Product Zero OP/LP With Hits (PWS)</b>.</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Products with Hits-Stock with zero OP/LP Exception File (<b>AIEPWS</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the <a href="#">Replenishment hierarchy</a> to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> R, S or blank  <b>Recommended Value:</b> R            (A 1) Required</p>

Field/Function Key	Description
Products With Hits - Non-Stocked Action	<p>This field determines what action will be taken when a Products With Hits Non-Stocked Action Exception (issue) occurs. That is, for items that are flagged as <b>Update Inventory = N</b> in Item Master Maintenance (MENU IAFILE), you may want to be notified, via an exception, if the items are still getting 'hits'.</p> <p>The value entered here determines if and how you will be notified via this exception if hits occur for items flagged as <b>Update Inventory = N</b> in Item Master Maintenance (MENU IAFILE) or items flagged as <b>Plan=N</b> in Item Balance Maintenance (MENU IAFILE) which are not already tracked as discontinued in the AIM Exception Products with Hits-Discontinued Exception File (<b>AIEPWD</b>) file.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Products with Hits- Non-stock Exception File (<b>AIEPWN</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Non-Stock Product With Hits (PWN).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Products with Hits- Non-stock Exception File (<b>AIEPWN</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the Replenishment hierarchy to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> R, S or blank  <b>Recommended Value:</b> R                      (A 1) Required</p>

Field/Function Key	Description
Inventory Value Change - Threshold Action	<p>This field determines what action will be taken when a Threshold adjuster is used for an item's order point and an Inventory Value Change Exception (issue) occurs. That is, if a Threshold order point adjuster is assigned to an item, that allows the changing or adjusting of that normally calculated order point in AIM, if the item's order point has a maintenance code of <b>A</b> (Automatic), do you want to be notified via an exception when the order point has changed due to this adjuster.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Inventory Value Change - Threshold File (<b>AIIVT</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is <b>Inventory Value Change (Threshold) (IVT)</b>.</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Inventory Value Change - Threshold File (<b>AIIVT</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the Replenishment hierarchy to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> R, S or blank Recommended Value: R (A 1) Required</p>

Field/Function Key	Description
Inventory Value Change - ASQ Action	<p>This field determines what action will be taken when an ASQ adjuster is used for an item's order point and an Inventory Value Change Exception (issue) occurs. That is, if an ASQ order point adjuster is assigned to an item, that allows the changing or adjusting of that normally calculated order point in AIM, if the item's order point has a maintenance code of <b>A</b> (Automatic), do you want to be notified via an exception when the order point has changed due to this adjuster.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Inventory Value Change - ASQ File (<b>AIEIVA</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Inventory Value Change (ASQ) (IVA).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Inventory Value Change - ASQ File (<b>AIEIVA</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the Replenishment hierarchy to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> R, S or blank                      Recommended Value: R                      (A 1) Required</p>

Field/Function Key	Description
Inventory Value Change 5HI Action	<p>This field determines what action will be taken when a 5HI adjuster is used for an item's order point and an Inventory Value Change Exception (issue) occurs. That is, if a 5HI order point adjuster is assigned to an item, that allows the changing or adjusting of that normally calculated order point in AIM, if the item's order point has a maintenance code of <b>A</b> (Automatic), do you want to be notified via an exception when the order point has changed due to this adjuster.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Inventory Value Change - 5HI (<b>AIIEVF</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Inventory Value Change (5HI) (IVF).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Inventory Value Change - 5HI (<b>AIIEVF</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the <a href="#">Replenishment hierarchy</a> to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> R, S or blank Recommended Value: R (A 1) Required</p>

Field/Function Key	Description
Inventory Value Change - LUA Action	<p>This field determines what action will be taken when a Low Usage adjuster (LUA) is used for an item's order point and an Inventory Value Change Exception (issue) occurs. That is, if a LUA order point adjuster is assigned to an item, that allows the changing or adjusting of that normally calculated order point in AIM, if the item's order point has a maintenance code of <b>A</b> (Automatic), do you want to be notified via an exception when the order point has changed due to this adjuster.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Inventory Value Change - LUA File (<b>AIEIVL</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Inventory Value Change (LUA) (IVL).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Inventory Value Change - LUA File (<b>AIEIVL</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the Replenishment hierarchy to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> R, S or blank                      Recommended Value: R                      (A 1) Required</p>

Field/Function Key	Description
Forecast Accuracy - Action	<p>This field determines what action will be taken when it is determined that you are no longer on track to meet the Average Month's Usage (AMU) and an Exception (issue) occurs.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Forecast Accuracy File (<b>AIEFCA</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Forecast Accuracy (FCA).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Forecast Accuracy File (<b>AIEFCA</b>), and will not be available for review in the Exception Center in ICC.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> R or S <b>Recommended Value:</b> R R (A 1) Required</p>
Forecast Accuracy - Qty Change Percent	<p>This field is used to identify the quantity change percent that must be exceeded when an item's usage is being evaluated during the month to see if you are still on track to meet that item's AMU; and if not, generate an exception. For example, assume you have used 10 so far this month of the item and during this evaluation, the system calculates a value of only 12 more to be used of the item. In this example, the system will add the 10 used so far and the 12 expected to be used to arrive at a total of 22 for the month. This value (e.g., 22) is then compared to the AMU (which assume we originally said was 30) that was last calculated. If the quantity difference between the two (in this example <math>30-22=8</math>) exceeds the minimum quantity number you key in the <b>Qty Change</b> field and this quantity difference is greater than the percentage you specify in this field, then an exception called the <b>Forecast Accuracy</b> (FCA) can be generated (if all other qualifications are met).</p> <p>Key the minimum quantity change percent.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> 1-999.99, or 0 if <b>Action</b> field is not <b>R</b> <b>Recommended Value:</b> 10 (N 5,2) Required</p>

Field/Function Key	Description
Forecast Accuracy Qty Change	<p>This field is used to identify the quantity change value that must be exceeded when an item's usage is being evaluated during the month to see if you are still on track to meet that item's AMU; and if not, generate an exception. For example, assume you have used 10 so far this month of the item and during this evaluation, the system calculates a value of only 12 more to be used of the item. In this example, the system will add the 10 used so far and the 12 expected to be used to arrive at a total of 22 for the month. This value (e.g., 22) is then compared to the AMU (which assume we originally said was 30) that was last calculated. If the quantity difference between the two (in this example <math>30-22=8</math>) exceeds the minimum quantity number you key in this field and this quantity difference is greater than the percentage you specify in the <b>Qty Change Percent</b> field, then an exception called the Forecast Accuracy (FCA) can be generated (if all other qualifications are met).</p> <p>Key the minimum quantity change value.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-999999999, or 0 if <b>Action</b> field is not <b>R</b></p> <p>Recommended Value: 5</p> <p>(N 9,0) Required</p>
Forecast Accuracy - Wait Days	<p>This field is used to identify the wait days value that must be met when an item's usage is being evaluated during the month to see if you are still on track to meet that item's AMU; and if not, generate an exception. For example, you may want to perform an evaluation 13 days after your last AIM month-end to see how your usage so far matches up to that previously calculated AMU (so, you would key 13 in this field). By entering 13 days, you will ensure that during the next day-end run that occurs on or after that 13th day since your last AIM month-end, the system will review the month- to-date usage of your AIM planned item(s) and based on that usage, calculate what it thinks you might use for the rest of the month to see if that previously calculated AMU needs to be reviewed.</p> <p>Key the wait days value. At least 7 days after the last AIM month-end is recommended before another evaluation is performed.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 7-21, or 0 if <b>Action</b> field is not <b>R</b></p> <p>Recommended Value: 15</p> <p>(N 2,0) Required</p>

Field/Function Key	Description
Forecast Accuracy - Hits Greater Than	<p>This field is used to identify the hits greater than value that must be exceeded when an item's usage is being evaluated during the month to see if you are still on track to meet that item's AMU; and if not, generate an exception.</p> <p>When evaluating your item's usage, more than this many hits of the item must be met in order to perform the evaluation.</p> <p>Key the hits greater than value.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-999999999, or 0 if <b>Action</b> field is not <b>R</b></p> <p>Recommended Value: 3</p> <p>(N 9,0) Required</p>
Forecast Accuracy - Unit Cost Greater Than	<p>This field is used to identify the unit cost greater than value that must be exceeded when an item's usage is being evaluated during the month to see if you are still on track to meet that item's AMU; and if not, generate an exception. This evaluation will only be performed for items whose cost (replacement cost of item) is greater than the cost you specify in this field.</p> <p>Key the unit cost greater than value. The default local currency displays to the right of this field.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-9999999999.99999, or 0 if <b>Action</b> field is not <b>R</b></p> <p>Recommended Value: 20</p> <p>(N 15,5) Required</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a>, without saving any additions/changes made to this screen.</p>
F24=Delete	<p>This field displays in Change mode only.</p> <p>Press <b>F24=DELETE</b> twice to delete the parameter record displayed. The <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear and the record will be deleted.</p> <p><b>Note:</b> You must delete higher level option before you can delete a lower level option. For example, if you are trying to delete Warehouse/Vendor options and have previously entered Warehouse/Vendor/PLine options for the same Warehouse/Vendor, then you must first delete the Warehouse/Vendor/PLine options for this Warehouse/Vendor.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management Replenishment Options - Exceptions Continued Screen</a> will appear.</p>

## Advanced Inventory Management Replenishment Options - Exceptions Continued Screen

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ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS  Change
Exceptions - Continued

WH:      Vendor:      PLine:      Item Class:  /
Level: System

Seasonal Trending:
Less Than Minimum Percent Action: R  More Than Maximum Percent Action: R,
Less Than Last Year Hits Action:  R  Less Than This Year Hits Action:  R,
Expiration Date Review:
Action: R  Maintenance Code: 9  Days: 45,
Threshold Ready to Expire:
Action: S  Days: ..7,
Automatic Exception Purge:
Action: Y  Days: 45,
ASQ Max Value Exceeded:
Action: R,
5-Hi Max Value Exceeded:
Action: R,

F12=Return  F24=Delete
    
```

This screen displays after pressing **ENTER** on the [Advanced Inventory Management Replenishment Options - Exceptions Screen](#).

Use this screen to add, change, or delete additional exception parameters. Exception parameters allow you to define rules for when exceptions could occur. The exceptions that could occur based on the parameters on this screen are used in conjunction with the [Advanced Inventory Management Replenishment Options - Usage Screen](#).

### Seasonal Trending Exceptions

On the [Advanced Inventory Management Replenishment Options - Usage Screen](#), seasonal parameters of **Minimum Number of Hits This Year** and **Minimum Number of Hits Last Year** must be met in order for a season trend to be applied to an item's usage. Then, when a trend percent is calculated, if it falls below or above the **Minimum Percent** and **Maximum Percent** parameters, respectively, the system will adjust the trending percent up to that minimum or down to that maximum.

In either of these cases, where the item does not meet the minimum hits to get a trend percent applied or the trend percent had to be adjusted to the minimum/maximum, exceptions can be generated and stored in the applicable file:

- Seasonal Trending Percent Lower than Minimum (**AIESLP**)
- Seasonal Trending Percent Greater than Maximum (**AIESHP**)

- Seasonal Trending Hits Lower than Last Year (**AIESLH**)
- Seasonal Trending Hits Lower than This Year (**IAESTH**)

Possible exceptions which can be generated are:

- *Seasonal Trending - Percent Lower than Minimum* (**SLP**)
- *Seasonal Trending - Percent Greater than Maximum* (**SHP**)
- *Seasonal Trending - Hits Lower than Last Year* (**SLH**)
- *Seasonal Trending - Hits Lower than This Year* (**STH**)

## Expiration Date Review Exceptions

Other than the threshold (which has its own expiration exception), there are other entries for various functions that allow you to enter expiration dates, or maintenance codes (**1-9**) that eventually expire. These are: Order Frequency, Lead Time, Safety Stock, Order Quantity, WH Line Hit Rank, ASQ, 5HI, LUA, Seasonal Trending, and Season Line Up.

At AIM month-end, you may wish to be notified, via an exception, of when these types of expirations are near. If so, you can enter a **Days** value and/or a **Maintenance Code** value that notifies the system to generate an exception called the Expiration Date Review (EDR) in the Aim Exception Expiration Date Review File (**AIEEDR**), if the expiration will occur within this number of **Days** or has this **Maintenance Code**.

**Note:** Expirations work in conjunction with the expiration fields on the AIM Information Ordering Screen in Item Balance Maintenance (MENU IAFILE).

## Threshold Ready to Expire Exceptions

When a threshold is assigned to an AIBAL record in Item Balance Maintenance (MENU IAFILE) on the AIM Information Ordering Screen, an expiration date is entered to identify when that threshold minimum will no longer apply.

At AIM month-end, you may wish to be notified, via an exception, of any expirations that are near. By providing a number of **Days**, an exception called the Threshold Ready to Expire (TRE) can be generated in the AIM Exception Threshold Ready to Expire File (**AIETRE**) to notify you that the item's threshold will be expiring within that number of days.

## Automatic Exception Purge Exceptions

To prevent the exception files from growing too large, they may be purged at AIM month-end based on the **Days** provided. Any data in the exception files that is older than the number of days specified will be purged automatically at AIM month-end.

The exception files purged are:

- AIM Exception - ASQ Max Value Exceeded (**AIEASQL**)

- AIM Exception - Expiration Date Review (**AIEEDR**)
- AIM Exception - Exceptional Usage Corrected (**AIEEUS**)
- AIM Exception - Forecast Accuracy (**AIEFCA**)
- AIM Exception - Inventory Value Change ASQ (**AIEIVA**)
- AIM Exception - Inventory Value Change 5HI (**AIEIVF**)
- AIM Exception - Inventory Value Change LUA(**AIEIVL**)
- AIM Exception - Inventory Value Change Threshold (**AIEIVT**)
- AIM Exception - Low Usage Corrected (**AIELUS**)
- AIM Exception - Overridden Product about to Expire (**AIEOPR**)
- AIM Exception - Purchase Order Lead Time Review (**AIEPLT**)
- AIM Exception - Purchase Order Safety Review (**AIEPSR**)
- AIM Exception - Product With Hits Discontinued (**AIEPWD**)
- AIM Exception - Product With Hits Non-Stocks (**AIEPWN**)
- AIM Exception - Product With Hits Stock with Zero OP/LP (**AIEPWS**)
- AIM Exception - Seasonal Trending Above Max Percent (**AIESHP**)
- AIM Exception - Seasonal Trending Below Last Year's Hits (**AIESLH**)
- AIM Exception - Seasonal Trending Below Min Percent (**AIESLP**)
- AIM Exception - Seasonal Trending Below This Year's Hits (**AIESTH**)
- AIM Exception - Threshold With Low Activity (**AIETLA**)
- AIM Exception - Threshold Ready to Expire (**AIETRE**)
- AIM Exception - 5HI Max Value Exceeded (**AIE5HI**)

## Inventory Max Value Change Exceptions (ASQ and 5HI)

If using order point adjusters of Threshold, ASQ, 5HI, and/or Low Usage Adjuster (LUA), an Inventory Value Change Exception could be generated to notify you when an order point adjuster was applied to the item's order point. Refer to the Inventory Value Change Exception fields on the [Advanced Inventory Management Replenishment Options - Exceptions Screen](#) for further details.

In cases where an ASQ or a 5HI adjuster was attempted to be applied, but by doing so would have exceeded a pre-defined max dollar (value) limit, the ASQ or 5HI adjuster would not be applied to the item's order point (and thus an Inventory Value Change Exception would not be generated). Note that this max dollar limit is determined by the ASQ and 5HI fields (Use **Max Val Diff** and **Max Value Difference**) on the [Advanced Inventory Management Replenishment Options - Adjusters Screen](#), and in AIM Interactive Forecasting (AIMAIN), and Item Balance Maintenance (MENU IAFILE).

In cases where an ASQ or 5HI adjuster would have been used, but could not be because of the max value difference, then an exception called the **Average Sales Qty - Max Amount** (ASQ) or **Five-High Sales Qty - Max Amount** (5HI) can be generated to track that situation. The ASQ or 5HI exception is stored in the (AIM Exception ASQ) Exception File (**AIEASQ**) or (AIM Exception 5HI) Exception File (**AIE5HI**), respectively.

**Note:** If you left all fields blank on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining system level options as indicated in the Level field on this screen. If you keyed values on the [Advanced Inventory Management Replenishment Options Screen](#), you will be defining unique replenishment options by warehouse, vendor, purchasing line, and optional item class/sub-class.

**Advanced Inventory Management Replenishment Options - Exceptions Continued Screen  
Fields and Function Keys**

Field/Function Key	Description
WH	This field displays the warehouse, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> .
Vendor	This field displays the vendor, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> .
PLine	This field displays the purchasing line, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> .
Item Class	This field displays the item class/sub-class, if any, selected on the <a href="#">Advanced Inventory Management Replenishment Options Screen</a> .
Level	This field indicates the level of replenishment options you are defining lead time parameters for. Levels are: <ul style="list-style-type: none"> <li>• System</li> <li>• Warehouse</li> <li>• Vendor</li> <li>• Purchasing Line</li> <li>• Item Class</li> </ul> Display

Field/Function Key	Description
Seasonal Trending - Less Than Minimum Percent Action	<p>This field determines what action will be taken when a Less Than Minimum Percent Action Exception (issue) occurs. That is, when the item trend percent had to be adjusted to the minimum.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the Seasonal Trending Percent Lower than Minimum File (<b>AIESLP</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is <b>Seasonal Trending - Percent Lower than Minimum (SLP)</b>.</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the Seasonal Trending Percent Lower than Minimum File (<b>AIESLP</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the Replenishment hierarchy to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> R, S or blank</p> <p>Recommended Value: R</p> <p>(A 1) Required</p>

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Field/Function Key	Description
Seasonal Trending - More Than Maximum Percent Action	<p>This field determines what action will be taken when a More Than Maximum Percent Action Exception (issue) occurs. That is, when the item trend percent had to be adjusted to the maximum.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the Seasonal Trending Percent Greater than Maximum (<b>AIESHP</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Seasonal Trending - Percent Greater than Maximum (SHP).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the Seasonal Trending Percent Greater than Maximum (<b>AIESHP</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the <a href="#">Replenishment hierarchy</a> to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> R, S or blank</p> <p>Recommended Value: R</p> <p>(A 1) Required</p>

Field/Function Key	Description
Seasonal Trending - Less Than Last Year Hits Action	<p>This field determines what action will be taken when a Less Than Last Year Hits Action Exception (issue) occurs. That is, when the item does not meet the minimum hits to get a trend percent applied.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the Seasonal Trending Hits Lower than Last Year (<b>AIESLH</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Seasonal Trending - Hits Lower than Last Year (SLH).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the Seasonal Trending Hits Lower than Last Year (<b>AIESLH</b>) and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the <a href="#">Replenishment hierarchy</a> to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> R, S or blank</p> <p>Recommended Value: R</p> <p>(A 1) Required</p>

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Field/Function Key	Description
Seasonal Trending - Less Than This Year Hits Action	<p>This field determines what action will be taken when a Less Than This Year Hits Action Exception (issue) occurs. That is, when the item does not meet the minimum hits to get a trend percent applied.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the Seasonal Trending Hits Lower than This Year (<b>IAESTH</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is <b>Seasonal Trending - Hits Lower than This Year</b> (STH).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the Seasonal Trending Hits Lower than This Year (<b>IAESTH</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the <a href="#">Replenishment hierarchy</a> to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> R, S or blank</p> <p>Recommended Value: R</p> <p>(A 1) Required</p>
Expiration Date Review - Action	<p>This field determines what action will be taken when an Expiration Date Review Exception (issue) occurs. That is, do you want to be notified, at AIM month-end, when certain types of expirations are near. Types include: Order Frequency, Lead Time, Safety Stock, Order Quantity, WH Line Hit Rank, ASQ, 5HI, LUA, Seasonal Trending, and Season Line Up.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the Aim Exception Expiration Date Review File (<b>AIEDDR</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Expiration Date Review (EDR).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the Aim Exception Expiration Date Review File (<b>AIEDDR</b>), and will not be available for review in the Exception Center in ICC.</p> <p><b>Default Value:</b> Blank <b>Valid Values:</b> R or S Recommended Value: R</p> <p>(A 1) Required</p>

Field/Function Key	Description
Expiration Date Review - Maintenance Code	<p>You may want to be notified, via an exception, when various functions reach a certain maintenance code (or number of months remaining) and are close to being expired. Functions include: Order Frequency, Lead Time, Safety Stock, Order Quantity, WH Line Hit Rank, ASQ, 5HI, LUA, Seasonal Trending, and Season Line Up.</p> <p>By identifying that desired maintenance code in this field, AIM month-end can create an exception called the <b>Expiration Date Review (EDR)</b>, if the expiration will occur within the number of days you key in the <b>Days</b> field or has the maintenance code you key in this field.</p> <p>Key the desired maintenance code.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 1-9, or blank</p> <p>Recommended Value: 2 (2 month end cycles)</p> <p>(A 1) Required, if the <b>Action</b> field is R</p>
Expiration Date Review - Days	<p>You may want to be notified, via an exception, when various functions are close to expiring based on a certain number of days. Functions include: Order Frequency, Lead Time, Safety Stock, Order Quantity, WH Line Hit Rank, ASQ, 5HI, LUA, Seasonal Trending, and Season Line Up.</p> <p>By identifying a days value in this field, AIM month-end can create an exception called the Expiration Date Review (EDR), if the expiration will occur within the number of days you key in this field or has the maintenance code you key in the <b>Maintenance Code</b> field.</p> <p>Key the desired days value.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> 7-999, or 0 if <b>Action</b> field is not <b>R</b></p> <p>Recommended Value: 30</p> <p>(N 3,0) Required</p>

Field/Function Key	Description
Threshold Ready to Expire - Action	<p>This field determines what action will be taken when a Threshold Ready to Expire Exception (issue) occurs. That is, when an item's threshold will soon be expiring you may want to be notified at AIM month-end.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the AIM Exception Threshold Ready to Expire File (<b>AIETRE</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Threshold Ready to Expire (TRE).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the AIM Exception Threshold Ready to Expire File (<b>AIETRE</b>), and will not be available for review in the Exception Center in ICC.</p> <p><b>Default Value:</b> Blank  <b>Valid Values:</b> R or S  Recommended Value: R  (A 1) Required</p>
Threshold Ready to Expire - Days	<p>At AIM month-end, you may wish to be notified, via an exception, of any expirations that are near. By providing a number of days in this field, you could be notified when an item's threshold will be expiring within the number of days you key in this field. Thresholds are assigned to an AIBAL record in Item Balance Maintenance (MENU IAFILE) on the AIM Information Ordering Screen.</p> <p>Key the days value.</p> <p><b>Default Value:</b> Blank  <b>Valid Values:</b> must be 7 or greater; 0 allowed if <b>Action</b> field is not <b>R</b>  Recommended Value: 30  (N 3,0) Required</p>

Field/Function Key	Description
Automatic Exception Purge - Action	<p>To prevent the exception files from growing too large, they may be purged at AIM month-end. Any data in the exception files that is older than the number of days specified (in the Days field) will be purged automatically at AIM month-end.</p> <p>Key <b>Y</b> to automatically purge exception files at AIM month-end.</p> <p>Key <b>N</b> if you do not want exception files purged automatically at AIM month-end.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> Y or N</p> <p>Recommended Value: Y</p> <p>(A 1) Required</p>
Automatic Exception Purge - Days	<p>If you are purging exception files at AIM month-end, the value you key in this field determines the files that will be purged. Any data in the exception files that is older than the number of days specified in this field will be purged automatically at AIM month-end.</p> <p>Key the days value.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> must be 7 or greater; 0 allowed if <b>Action</b> field is not <b>R</b></p> <p>Recommended Value: 100</p> <p>(N 3,0) Required</p>

Field/Function Key	Description
ASQ Max Value Exceeded - Action	<p>This field determines what action will be taken when an ASQ Max Value Exceeded Exception (issue) occurs. That is, when an item's order point would have been increased if not for a pre-defined ASQ max value limit having been exceeded.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the (AIM Exception ASQ) Exception File (<b>AIEASQ</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is Average Sales Qty - Max Amount (ASQ).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the (AIM Exception ASQ) Exception File (<b>AIEASQ</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the <a href="#">Replenishment hierarchy</a> to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> R, S or blank</p> <p>Recommended Value: R</p> <p>(A 1) Required</p>

Field/Function Key	Description
5HI Max Value Exceeded - Action	<p>This field determines what action will be taken when a 5HI Max Value Exceeded Exception (issue) occurs. That is, when an item's order point would have been increased if not for a pre-defined 5HI max value limit having been exceeded.</p> <p>Key <b>R</b> (Report) to have this type of exception reported. When an occurrence of this exception is found, the exception entry will be generated and stored in the (AIM Exception 5HI) Exception File (<b>AIE5HI</b>), and the exception will then be available for review in the Exception Center in the Inventory Control Center (ICC) application. The default exception reason code for this is <b>Five- High Sales Qty - Max Amount</b> (5HI).</p> <p>Key <b>S</b> (Suppress) to have this type of exception suppressed. When an occurrence of this exception is found, the exception entry will not be generated or stored in the (AIM Exception 5HI) Exception File (<b>AIE5HI</b>), and will not be available for review in the Exception Center in ICC.</p> <p>Leave this field blank to have the system use the <b>Action</b> field value found in the next highest record using the <a href="#">Replenishment hierarchy</a> to determine if this type of exception will be reported or suppressed.</p> <p><b>Default Value:</b> Blank</p> <p><b>Valid Values:</b> R, S or blank</p> <p>Recommended Value: R</p> <p>(A 1) Required</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a>, without saving any additions/changes made to this screen.</p>
F24=Delete	<p>This field displays in Change mode only.</p> <p>Press <b>F24=DELETE</b> twice to delete the parameter record displayed. The <a href="#">Advanced Inventory Management Replenishment Options - Exceptions Screen</a> will appear and the record will be deleted.</p> <p><b>Note:</b> You must delete higher level option before you can delete a lower level option. For example, if you are trying to delete Warehouse/Vendor options and have previously entered Warehouse/Vendor/PLine options for the same Warehouse/Vendor, then you must first delete the Warehouse/Vendor/PLine options for this Warehouse/Vendor.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The <a href="#">Advanced Inventory Management Replenishment Options - Option Selection Screen</a> will appear.</p>

## Replenishment Options Listing

This option is used to print one or more Replenishment Options Listing.

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">Advanced Inventory Management Replenishment Options Listing Screen</a>	Use to specify the selection criteria for the listing(s).
<a href="#">AIM Replenishment Ranking Options Listing</a>	Prints a list of ranking parameters defined through Replenishment Options Maintenance (MENU AIFILE).
<a href="#">AIM Replenishment Adjusters Options Listing</a>	Prints a list of adjuster parameters defined through Replenishment Options Maintenance (MENU AIFILE).
<a href="#">AIM Replenishment Lead Time Options Listing</a>	Prints a list of lead time parameters defined through Replenishment Options Maintenance (MENU AIFILE).
<a href="#">AIM Replenishment Rounding Options Listing</a>	Prints a list of rounding parameters defined through Replenishment Options Maintenance (MENU AIFILE).
<a href="#">AIM Replenishment Usage Options Listing</a>	Prints a list of usage parameters defined through Replenishment Options Maintenance (MENU AIFILE).
<a href="#">AIM Replenishment Exceptions Options Listing</a>	Prints a list of exception parameters defined through Replenishment Options Maintenance (MENU AIFILE).

## Advanced Inventory Management Replenishment Options Listing Screen

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ADVANCED INVENTORY MANAGEMENT REPLENISHMENT OPTIONS LISTING

Selection:

Warehouse?      ...           To?  ...
Vendor?         .....         To?  .....
Purchasing Line? .....       To?  .....
Item Class?     .../...       To?  .../...

Print:

Ranking Options:  Y
Adjusters Options: Y
Lead Time Options: Y
Rounding Options: Y
Usage Options:    Y
Exceptions Options: Y

F3=Cancel
    
```

This screen appears after you select option **31** - [Replenishment Options Listing](#) from MENU AIFILE.

Use this screen to select the range of criteria for which replenishment options will print. One or more Advanced Inventory Replenishment Options Listings will print based on the print selection criteria on this screen.

Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

### Advanced Inventory Management Replenishment Options Listing Screen Fields and Function Keys

Field/Function Key	Description
Warehouse	<p>Use this field to enter the warehouse or range of warehouses for which replenishment options will print.</p> <p><b>Valid Values:</b> A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).</p> <p>(2 @ A 2) Optional</p>

Field/Function Key	Description
Vendor	<p>Use this field to enter the vendor or range of vendors for which replenishment options will print.</p> <p><b>Valid Values:</b> A valid vendor defined through Vendors Maintenance (MENU APFILE/MENU POFILE). (2 @ A 6) Optional</p>
Purchasing Line	<p>Use this field to enter the purchasing line or range of purchasing lines for which replenishment options will print.</p> <p><b>Valid Values:</b> A valid purchasing line defined through Purchasing Line Maintenance (MENU POFIL2). (2 @ A 10) Optional</p>
Item Class	<p>Use this field to enter the item class/sub-class or range of item classes/sub-classes of the items to include in the listing. If the sub-class is left blank, all sub-classes within the item class indicated will print.</p> <p><b>Valid Values:</b> Item classes are defined through Item Class/Sub Class Maintenance (MENU IAFILE) and are assigned to items through Item Master Maintenance (MENU IAFILE). (2 @ A 2 / A 2) Optional</p>
Ranking Options	<p>Use this field to specify if you want the <a href="#">AIM Replenishment Ranking Options Listing</a> to print.</p> <p>Key <b>Y</b> to have this listing print. Key <b>N</b> to exclude this listing from printing.</p> <p><b>Default Value:</b> Y <b>Valid Values:</b> Y or N (A 1) Required</p>
Adjusters Options	<p>Use this field to specify if you want the <a href="#">AIM Replenishment Adjusters Options Listing</a> to print.</p> <p>Key <b>Y</b> to have this listing print. Key <b>N</b> to exclude this listing from printing.</p> <p><b>Default Value:</b> Y <b>Valid Values:</b> Y or N (A 1) Required</p>

Field/Function Key	Description
Lead Time Options	<p>Use this field to specify if you want the <a href="#">AIM Replenishment Lead Time Options Listing</a> to print.</p> <p>Key <b>Y</b> to have this listing print.</p> <p>Key <b>N</b> to exclude this listing from printing.</p> <p><b>Default Value:</b> Y</p> <p><b>Valid Values:</b> Y or N</p> <p>(A 1) Required</p>
Rounding Options	<p>Use this field to specify if you want the <a href="#">AIM Replenishment Rounding Options Listing</a> to print.</p> <p>Key <b>Y</b> to have this listing print.</p> <p>Key <b>N</b> to exclude this listing from printing.</p> <p><b>Default Value:</b> Y</p> <p><b>Valid Values:</b> Y or N</p> <p>(A 1) Required</p>
Usage Options	<p>Use this field to specify if you want the <a href="#">AIM Replenishment Usage Options Listing</a> to print.</p> <p>Key <b>Y</b> to have this listing print.</p> <p>Key <b>N</b> to exclude this listing from printing.</p> <p><b>Default Value:</b> Y</p> <p><b>Valid Values:</b> Y or N</p> <p>(A 1) Required</p>
Exceptions Options	<p>Use this field to specify if you want the <a href="#">AIM Replenishment Usage Options Listing</a> to print.</p> <p>Key <b>Y</b> to have this listing print.</p> <p>Key <b>N</b> to exclude this listing from printing.</p> <p><b>Default Value:</b> Y</p> <p><b>Valid Values:</b> Y or N</p> <p>(A 1) Required</p>
F3=Cancel	<p>Press <b>F3=CANCEL</b> to cancel this option and return to MENU AIFILE.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The Report Options Screen will appear. Refer to the Infor Distribution A+ Cross Applications User Guide for details about this screen.</p>

# AIM Replenishment Ranking Options Listing

AI915A 07/27/15 16.37.32		AIM REPLENISHMENT RANKING OPTIONS LISTING			AK/APDEMO	PAGE: 1
All Warehouses		All Vendors	All Classes	All Purchasing Lines		
Warehouse:	Vendor:	Item Class:	Purchasing Line:			
Product is New Months:	12	Perform Detail Ranking:	Y	Number of Ranks:		5
Line Hit History Months:	12	New Product Default Rank:	C	Ranking Based On:		P
Ranking Code:	A	Based on Rank Percent:	80.00	Based on Minimum Hits:		
Usage Rate Months:	3	Vendor Least Days Safety:	1	Vendor Most Days Safety:		999
Vendor Between Safety Type:	P	Vendor Between Safety Value:	1.00	WH Least Days Safety:		7
WH Most Days Safety:	30	WH Between Safety Type:	P	WH Between Safety Value:		35.00
Safety Exception Action		Safety Exception Max Receipts:		Safety Exception Max Months:		
Safety Exception Max Out of Range:		Safety Exception Less Than Pot:		Safety Except Greater Than Pct:		
Ranking Code:	B	Based on Rank Percent:	4.00	Based on Minimum Hits:		
Usage Rate Months:	4	Vendor Least Days Safety:	1	Vendor Most Days Safety:		999
Vendor Between Safety Type:	P	Vendor Between Safety Value:	1.00	WH Least Days Safety:		7
WH Most Days Safety:	30	WH Between Safety Type:	P	WH Between Safety Value:		50.00
Safety Exception Action		Safety Exception Max Receipts:		Safety Exception Max Months:		
Safety Exception Max Out of Range:		Safety Exception Less Than Pot:		Safety Except Greater Than Pct:		
Ranking Code:	C	Based on Rank Percent:	15.00	Based on Minimum Hits:		
Usage Rate Months:	5	Vendor Least Days Safety:	1	Vendor Most Days Safety:		999
Vendor Between Safety Type:	P	Vendor Between Safety Value:	1.00	WH Least Days Safety:		7
WH Most Days Safety:	30	WH Between Safety Type:	P	WH Between Safety Value:		75.00
Safety Exception Action		Safety Exception Max Receipts:		Safety Exception Max Months:		
Safety Exception Max Out of Range:		Safety Exception Less Than Pot:		Safety Except Greater Than Pct:		
Ranking Code:	D	Based on Rank Percent:	1.00	Based on Minimum Hits:		
Usage Rate Months:	6	Vendor Least Days Safety:	1	Vendor Most Days Safety:		999
Vendor Between Safety Type:	P	Vendor Between Safety Value:	1.00	WH Least Days Safety:		7
WH Most Days Safety:	30	WH Between Safety Type:	P	WH Between Safety Value:		100.00
Safety Exception Action		Safety Exception Max Receipts:		Safety Exception Max Months:		
Safety Exception Max Out of Range:		Safety Exception Less Than Pot:		Safety Except Greater Than Pct:		
Ranking Code:	E	Based on Rank Percent:		Based on Minimum Hits:		
Usage Rate Months:	6	Vendor Least Days Safety:		Vendor Most Days Safety:		
Vendor Between Safety Type:	I	Vendor Between Safety Value:		WH Least Days Safety:		
WH Most Days Safety:		WH Between Safety Type:	I	WH Between Safety Value:		
Safety Exception Action		Safety Exception Max Receipts:		Safety Exception Max Months:		
Safety Exception Max Out of Range:		Safety Exception Less Than Pot:		Safety Except Greater Than Pct:		

This listing prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

The ranking parameters defined through Replenishment Options Maintenance (MENU AIFILE) are printed in Warehouse, Vendor, Purchasing Line, Item Class/Sub-class sequence. For details regarding each option, refer to the [Advanced Inventory Management Replenishment Options - Ranking Screen](#).

**Note:** The message “\* Data may have been omitted due to security considerations \*” will print when the user that generated this listing is not authorized to all the warehouse selected data, as determined through Authority Profile Maintenance (MENU XASCTY).

## AIM Replenishment Adjusters Options Listing

AI915F 07/29/15 11.59.15		AIM REPLENISHMENT ADJUSTERS OPTIONS LISTING			AK/APDEMO	PAGE: 1
All Warehouses		All Vendors	All Classes	All Purchasing Lines		
-----						
Warehouse:	Vendor:	Item Class: / Purchasing Line:				
ASQ Line Hits:	3	ASQ Include Transfers:	Y	ASQ Calculation Method:	H	
ASQ Use Max Difference:	Y	ASQ Max Diff:	500.00 US\$	5Hi Line Hits:	3	
5Hi Include Transfers:	Y	5Hi Calculation Method:	U	5Hi Use Max Difference:	Y	
5Hi Max Diff:	250.00 US\$	Use Low Usage OP Adjuster:		Low Usage OP Adjuster Months to Use:		
LUA Hits Greater Than:	4	LUA Cost Less Than:	10,000,000,000.00 US\$	LUA Order Point:	1	
-----						
Warehouse: 1	Vendor: 100	Item Class: / Purchasing Line:				
ASQ Line Hits:		ASQ Include Transfers:		ASQ Calculation Method:		
ASQ Use Max Difference:		ASQ Max Diff:	US\$	5Hi Line Hits:		
5Hi Include Transfers:		5Hi Calculation Method:		5Hi Use Max Difference:		
5Hi Max Diff:	US\$	Use Low Usage OP Adjuster:	Y	Low Usage OP Adjuster Months to Use:	11	
-----						

This listing prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

The adjuster parameters defined through Replenishment Options Maintenance (MENU AIFILE) are printed in Warehouse, Vendor, Purchasing Line, Item Class/Sub-class sequence. For details regarding each option, refer to the [Advanced Inventory Management Replenishment Options - Adjusters Screen](#).

**Note:** The message “\* Data may have been omitted due to security considerations \*” will print when the user that generated this listing is not authorized to all the warehouse selected data, as determined through Authority Profile Maintenance (MENU XASCTY).

# AIM Replenishment Lead Time Options Listing

AI915G 08/17/15 15.48.14	AIM REPLENISHMENT LEAD TIME OPTIONS LISTING			AK/APDEMO	PAGE: 1
All Warehouses	All Vendors	All Classes	All Purchasing Lines		
-----					
Warehouse:	Vendor:	Item Class: /	Purchasing Line:		
Vendor Less Than Lead Time:	7		Vendor Less Than Set Lead Time:	7	Vendor Greater Than Lead Time: 60
Vendor Greater Than Set Lead Time:	60		WH Less Than Lead Time:	5	WH Less Than Set Lead Time: 5
WH Greater Than Lead Time:	5		WH Greater Than Set Lead Time:	5	Average Calculation Receipts: 3
Average Calculation Receipt Months:	6		Percentage Exception Action:	S	Percentage Except Less Than Pct:
Percent Except Greater Than Pct:	10.00				
-----					

This listing prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

The lead time parameters defined through Replenishment Options Maintenance (MENU AIFILE) are printed in Warehouse, Vendor, Purchasing Line, Item Class/Sub-class sequence. For details regarding each option, refer to the [Advanced Inventory Management Replenishment Options - Lead Time Screen](#).

**Note:** The message “\* Data may have been omitted due to security considerations \*” will print when the user that generated this listing is not authorized to all the warehouse selected data, as determined through Authority Profile Maintenance (MENU XASCTY).

## AIM Replenishment Rounding Options Listing

AI915C 07/11/13 11.57.58		AIM REPLENISHMENT ROUNDING OPTIONS LISTING		PS/APDEMO	PAGE: 1
All Warehouses		All Vendors	All Classes	All Purchasing Lines	
Warehouse:	Vendor:	Item Class: /	Purchasing Line:	Months Usage Existing Products: 6	
Transfer Unit Rounding:	S	Buying Unit Rounding:	S		
New Prod Extra Cost:	15.00 US\$	Exist Prd Extra Cst:	20.00 US\$		
Warehouse: 1	Vendor:	Item Class: /	Purchasing Line:	Months Usage Existing Products: 6	
Transfer Unit Rounding:	I	Buying Unit Rounding:	B		
New Prod Extra Cost:	15.00 US\$	Exist Prd Extra Cst:	20.00 US\$		
Warehouse: 1	Vendor: 1	Item Class: /	Purchasing Line:	Months Usage Existing Products: 6	
Transfer Unit Rounding:	N	Buying Unit Rounding:	N		
New Prod Extra Cost:	15.00 US\$	Exist Prd Extra Cst:	20.00 US\$		
Warehouse: 2	Vendor:	Item Class: /	Purchasing Line:	Months Usage Existing Products: 6	
Transfer Unit Rounding:	S	Buying Unit Rounding:	S		
New Prod Extra Cost:	15.00 US\$	Exist Prd Extra Cst:	20.00 US\$		
Warehouse: 2	Vendor: 1	Item Class: /	Purchasing Line:	Months Usage Existing Products: 7	
Transfer Unit Rounding:	N	Buying Unit Rounding:	N		
New Prod Extra Cost:	1,000.00 US\$	Exist Prd Extra Cst:	1,000.00 US\$		
Warehouse: 2	Vendor: 100	Item Class: /	Purchasing Line:	Months Usage Existing Products: 6	
Transfer Unit Rounding:	N	Buying Unit Rounding:	N		
New Prod Extra Cost:	1,000.00 US\$	Exist Prd Extra Cst:	1,000.00 US\$		
Warehouse: 2	Vendor: 100	Item Class: /	Purchasing Line: PLINE100	Months Usage Existing Products: 6	
Transfer Unit Rounding:	N	Buying Unit Rounding:	N		
New Prod Extra Cost:	50.00 US\$	Exist Prd Extra Cst:	100.00 US\$		

This listing prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

The rounding parameters defined through Replenishment Options Maintenance (MENU AIFILE) are printed in Warehouse, Vendor, Purchasing Line, Item Class/Sub-class sequence. For details regarding each option, refer to the [Advanced Inventory Management Replenishment Options - Warehouse Transfer Rounding Screen](#).

**Note:** The message “\* Data may have been omitted due to security considerations \*” will print when the user that generated this listing is not authorized to all the warehouse selected data, as determined through Authority Profile Maintenance (MENU XASCTY).

# AIM Replenishment Usage Options Listing

AI915B 08/17/15 16.23.48		AIM REPLENISHMENT USAGE OPTIONS LISTING		TC/APDEMO	PAGE: 1
All Warehouses		All Vendors	All Classes	All Purchasing Lines	
-----					
Warehouse:	Vendor:	Item Class: /	Purchasing Line:		
Default Usage Method	B	Trend End Date:	0/00/00	Trend Minimum Percent:	
Trend Maximum Percent:		Trend Min Hits Last Year	3	Trend Min Hits This Year:	3
Line-Up Months:		Line-Up End Date:	0/00/00	Advance by Lead Time:	N
Exceptional Usage Action:	B	Except Usage Minimum Qty:	20	Except Usage Override Percent:	21.00
Except Usage Override Reason:	HI	Low Usage Action:	B	Low Usage Minimum Qty:	22
Low Usage Override Percent:	23.00	Low Usage Override Reason:	CM		
-----					
Warehouse: 1	Vendor:	Item Class: /	Purchasing Line:		
Default Usage Method		Trend End Date:	12/31/14	Trend Minimum Percent:	10.00
Trend Maximum Percent:	11.00	Trend Min Hits Last Year		Trend Min Hits This Year:	12
Line-Up Months:	2	Line-Up End Date:	12/31/14	Advance by Lead Time:	
Exceptional Usage Action:		Except Usage Minimum Qty:		Except Usage Override Percent:	
Except Usage Override Reason:		Low Usage Action:		Low Usage Minimum Qty:	
Low Usage Override Percent:		Low Usage Override Reason:			
-----					
Warehouse: 1	Vendor: 100	Item Class: /	Purchasing Line:		
Default Usage Method		Trend End Date:	0/00/00	Trend Minimum Percent:	
Trend Maximum Percent:		Trend Min Hits Last Year		Trend Min Hits This Year:	
Line-Up Months:		Line-Up End Date:	0/00/00	Advance by Lead Time:	
Exceptional Usage Action:		Except Usage Minimum Qty:		Except Usage Override Percent:	
Except Usage Override Reason:		Low Usage Action:		Low Usage Minimum Qty:	
Low Usage Override Percent:		Low Usage Override Reason:			
-----					

This listing prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

The usage parameters defined through Replenishment Options Maintenance (MENU AIFILE) are printed in Warehouse, Vendor, Purchasing Line, Item Class/Sub-class sequence. For details regarding each option, refer to the [Advanced Inventory Management Replenishment Options - Usage Screen](#).

**Note:** The message “\* Data may have been omitted due to security considerations \*MST” will print when the user that generated this listing is not authorized to all the warehouse selected data, as determined through Authority Profile Maintenance (MENU XASCTY).

## AIM Replenishment Exceptions Options Listing

AI915E	07/27/15	16.03.26	AIM REPLENISHMENT EXCEPTIONS OPTIONS LISTING				AK/APDEMO	PAGE: 1
All Warehouses			All Vendors	All Classes	All Purchasing Lines			
Warehouse:	Vendor:	Item Class:	/ Purchasing Line:					
Threshold Low Activity Action:	R	Threshold Months to Compare:	1		TLA Total Hits Less Than:	1		
Threshold Wait Months:	1	Threshold Min Qty Chg Percent:	1.00		Threshold Min Qty Change:	1		
OP/LP Override Action:	S	OP/LP Override Maintenance Code:			PWH Months to Use:	1		
PWH Hits Greater Than:	1	PWH Discontinued Action:	R		PWH Stocked W/Zero OP/LP Action:	R		
PWH Non-Stocked Action:	R	Inventory Value Chg Threshold Act:	S		Inventory Value Chg ASQ Action:	S		
Inventory Value Chg 5-Hi Action:	S	Inventory Value Chg LUA Action:	S		Forecast Accuracy Action:	S		
Forecast Acc Qty Chg Percent:	1.00	Forecast Accuracy Qty Chg:	1		Forecast Accuracy Wait Days:	1		
Forecast Acc Hits Grtr Than:	1	Forecast Acc U/Cst	1.00000 US\$		S/T Less Than Minimum Percent Action:	R		
S/T More Than Maximum Percent Action:	R	S/T Less Than Last Year Hits Act:	R		S/T Less Than This Year Hits Action:	R		
Expiration Date Review Action:	S	Expiration Date Review Maint Code:	X		Expiration Date Review Days:			
Threshold Ready to Expire Action:	S	Threshold Ready to Expire Days:			Automatic Exception Purge Action:	N		
Automatic Exception Purge Days:		ASQ Maximum Value Exceeded Action:	S		5-Hi Maximum Value Exceeded Action:	S		

This listing prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

The exception parameters defined through Replenishment Options Maintenance (MENU AIFILE) are printed in Warehouse, Vendor, Purchasing Line, Item Class/Sub-class sequence. For details regarding each option, refer to the [Advanced Inventory Management Replenishment Options - Exceptions Screen](#) and [Advanced Inventory Management Replenishment Options - Exceptions Continued Screen](#).

**Note:** The message “\* Data may have been omitted due to security considerations \*MST” will print when the user that generated this listing is not authorized to all the warehouse selected data, as determined through Authority Profile Maintenance (MENU XASCTY).

## Chapter 29 Maintaining AIM Usage Override Reason Codes

Use AIM Usage Override Reason Codes Maintenance on the Advanced Inventory Management File Maintenance Menu (MENU AIFILE) to add or maintain usage override reason code settings.

During Replenishment Options Maintenance (MENU AIFILE), a change may be applied to an item's average usage to arrive at an adjustment value to reduce an item's exceptional usage (if any) or increase an item's low usage (if any). This option allows you to identify reasons of the usage override to be used during Replenishment Options Maintenance when an adjustment is being written to the Item Sales Demand Manual Adjustments File (**ITADJ**).

### AIM Usage Override Reason Codes Maintenance

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">Usage Override Reason Code Maintenance Selection Screen</a>	Use this screen to add, change or delete usage override reason codes.
<a href="#">Usage Override Reason Code Maintenance Screen</a>	Use this screen to add or change a usage override reason code description or delete a usage override reason code.

## Usage Override Reason Code Maintenance Selection Screen

```

        USAGE OVERRIDE REASON CODE MAINTENANCE

        Function:                .. (A,C,D)

        Usage Override Reason Code? ...

        F3=Exit
    
```

This screen appears after you select option **22** - [AIM Usage Override Reason Codes Maintenance](#) from MENU AIFILE.

Use this screen to add, change or delete usage override reason codes. These reason codes are used to identify and describe why an Exception Usage Control override and/or a Low Usage Control override occurred.

On the [Advanced Inventory Management Replenishment Options - Usage Screen](#) in Replenishment Options Maintenance (MENU AIFILE), you can establish parameters related to these two usage overrides, including which of these default reason codes should be used when the override occurs. Then, when that exception usage control override or low usage control override is applied by the system (which happens when a change is made to an item's average usage to arrive at an adjusted value to either reduce an item's exception usage or increase an item's low usage), the provided reason code will be used, and its description will appear in the demand adjustment as well as in the exception generated.

### Usage Override Reason Code Maintenance Selection Screen Fields & Function Keys

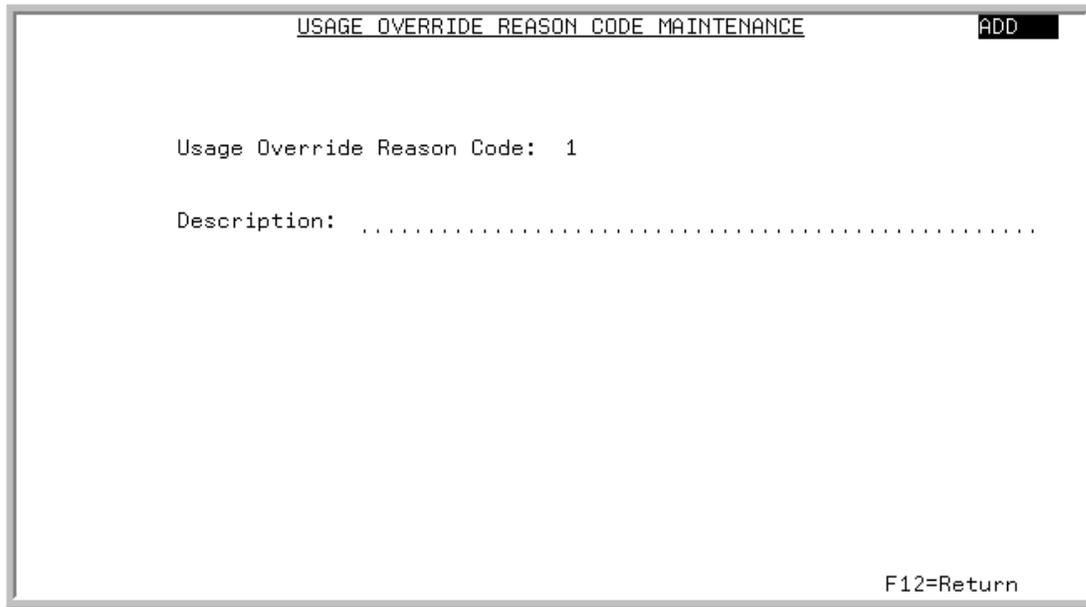
Field/Function Key	Description
Function	Key <b>A</b> to add a new usage override reason code. Key <b>C</b> to change an existing new usage override reason code. Key <b>D</b> to delete an existing new usage override reason code. (A 1) Required

---

Field/Function Key	Description
Usage Override Reason Code	Use this field to enter the usage override reason code you want to add, change or delete. Key the usage override reason code. (A 2) Required
F3=Exit	Press the <b>F3=EXIT</b> function key to cancel this option and return to MENU AIFILE.
Enter	Press the <b>ENTER</b> key to confirm your selections. The <a href="#">Usage Override Reason Code Maintenance Screen</a> will appear.

---

## Usage Override Reason Code Maintenance Screen



This screen appears after you press **ENTER** on the [Usage Override Reason Code Maintenance Selection Screen](#).

Use this screen to add or change a usage override reason code description or delete a usage override reason code.

### Usage Override Reason Code Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Usage Override Reason Code	This field displays the usage override reason code selected on the <a href="#">Usage Override Reason Code Maintenance Selection Screen</a> . Display
Description	Use this field to add or change the description for the selected usage override reason code. Key the usage override reason code description. (A 50) Required
F12=Return	Press <b>F12=RETURN</b> to return to the <a href="#">Usage Override Reason Code Maintenance Selection Screen</a> without saving any additions/changes made to this screen.
F24=Delete	The <b>F24=DELETE</b> function key displays in the Delete mode only. Press <b>F24=DELETE</b> twice to delete the record displayed. The <a href="#">Usage Override Reason Code Maintenance Selection Screen</a> will appear, and the record will be deleted.

Field/Function Key	Description
Enter	Press <b>ENTER</b> to confirm the description entered or changed and return to the <a href="#">Usage Override Reason Code Maintenance Selection Screen</a> .

---

## Usage Override Reason Code Listing

This option is used to print the [AIM Usage Override Reason Code Listing](#).

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">AIM Usage Override Reason Code Listing</a>	Prints the parameters defined through AIM Usage Override Reason Codes Maintenance (MENU AIFILE).

---

## AIM Usage Override Reason Code Listing

AI896 07/30/15 22.06.33		AIM USAGE OVERRIDE REASON CODE LISTING	AK/APDEMO	PA GE: 1
Usage Override				
Reason Code	Description			
EU	Exceptional Usage Corrected			
LU	Low Usage Corrected			

This listing prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

The parameters defined through AIM Usage Override Reason Codes Maintenance (MENU AIFILE) are printed.

## Chapter 30 Maintaining AIM Exception Reason Codes

Use AIM Exception Reason Codes Maintenance on the Advanced Inventory Management File Maintenance Menu (MENU AIFILE) to maintain exception reason code settings.

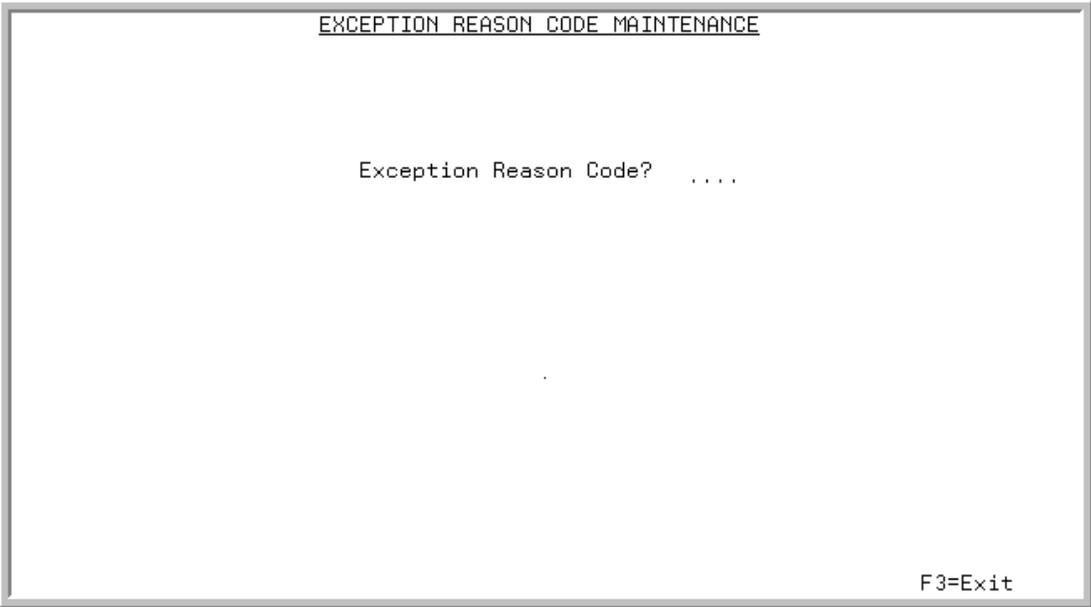
Exception reason codes are automatically pre-defined by the system. Through this option, you can provide a description for the different types of exceptions that can be generated by the system. You can also assign a priority to the exception reason code so that when exceptions are viewed in the Exception Center in the Inventory Control Center (ICC) application, they can be sorted by the priority (or level of importance).

### AIM Exception Reason Codes Maintenance

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">Exception Reason Code Maintenance Selection Screen</a>	Use this screen to select an exception reason code that you want to maintain.
<a href="#">Exception Reason Code Maintenance Screen</a>	Use this screen to add or maintain an exception reason code description and priority.

# Exception Reason Code Maintenance Selection Screen



This screen appears after you select option **23** - [AIM Exception Reason Codes Maintenance](#) from MENU AIFILE.

Use this screen to select an exception reason code that you want to maintain. Exception reason codes are automatically pre-defined by the system, and you will have the option to provide a description through this menu option and assign a priority so that when these exceptions are viewed, they can be sorted by the priority.

### Exception Reason Code Maintenance Selection Screen Fields &Function Keys

Field/Function Key	Description
Exception Reason Code	Use this field to select the exception reason code that you want to maintain. Key the code. For a list of valid pre-defined codes, key ? in this field and press <b>ENTER</b> . (A 3) Required
F3=Exit	Press the <b>F3=EXIT</b> function key to cancel this option and return to MENU AIFILE.
Enter	Press the <b>ENTER</b> key to confirm your selection. The <a href="#">Exception Reason Code Maintenance Screen</a> will appear.

## Exception Reason Code Maintenance Screen

EXCEPTION REASON CODE MAINTENANCE

Exception Reason Code: IVA

Description: .Inventory Value Change (ASQ).....

Priority: ..0

F12=Return

This screen appears after you press **ENTER** on the [Exception Reason Code Maintenance Selection Screen](#).

Use this screen to add or maintain an exception reason code description and priority. Assigning priorities to exceptions allows the user to sort exceptions by importance. Note that zero is the highest priority and 999 is the lowest priority.

### Exception Reason Code Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Exception Reason Code	This field displays the code you selected on the <a href="#">Exception Reason Code Maintenance Selection Screen</a> . Display
Description	Use this field to maintain the description provided for the exception reason code. Key the description. (A 50) Required

---

Field/Function Key	Description
Priority	<p>Use this field to select the priority for the exception reason code. Assigning priorities to exceptions will allow the user to sort exceptions by importance in the Exception Center in the Inventory Control Center (ICC) application.</p> <p>Key the priority. Note that zero is the highest priority and 999 is the lowest priority.</p> <p><b>Valid Values:</b> 0 - 999</p> <p>(N 3,0) Required</p>
F12=Return	<p>Press <b>F12=RETURN</b> to return to the <a href="#">Exception Reason Code Maintenance Selection Screen</a> without saving any additions/changes made to this screen.</p>
Enter	<p>Press <b>ENTER</b> twice to confirm your selections and return to the <a href="#">Exception Reason Code Maintenance Selection Screen</a>.</p>

---

## AIM Exception Reason Code Listing

This option is used to print the [AIM Exception Reason Code Listing](#).

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Field/Function Key	Description
<a href="#">AIM Exception Reason Code Listing</a>	Prints the parameters defined through AIM Exception Reason Codes Maintenance (MENU AIFILE).

---

## AIM Exception Reason Code Listing

Exception Reason Code	Description	Priority
AI898	19/05/15 12.36.42	AIM EXCEPTION REASON CODE LISTING
		AF/APDEMO PAGE: 1
ASQ	Average Sales Qty - Max Amount	
EDR	Expiration Date Review	
EUS	Exceptional Usage Corrected	
FCA	Forecast Accuracy	
IVA	Inventory Value Change (ASQ)	
IVF	Inventory Value Change (5-Hi)	
IVL	Inventory Value Change (LUA)	
IVT	Inventory Value Change (Threshold)	
LUS	Low Usage Corrected	
OPR	Overridden Product about to Reset	
PLT	Purchase Order Lead Time Review	
PSR	Purchase Order Safety Review	
PWD	Discounted Product With Hits	
PWN	Non-Stock Product With Hits	
PWS	Stocked Product Zero OP/LP With Hits	
SHP	Seasonal Trending - Percent Greater than Maximum	
SLH	Seasonal Trending - Hits Lower than Last Year	
SLP	Seasonal Trending - Percent Lower than Minimum	
STH	Seasonal Trending - Hits Lower than This Year	
TLA	Threshold With Low Activity	
TRE	Threshold Ready to Expire	
5HI	Five-High Sales Qty - Max Amount	

This listing prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

The parameters defined through [AIM Exception Reason Codes Maintenance](#) (MENU AIFILE) are printed for each pre-defined exception reason code.

## Chapter 31 Resetting AIM Variables

Use the Reset AIM Variables option on the Advanced Inventory Management Master Menu (MENU AIMAST) to reset the AIM variable fields (such as, Ordering Frequency and Lead Time) in the Advanced Inventory Balance File (**AIBAL**). Any of these variable fields that have a maintenance code of **A** (Automatic) will be reset from the defaults in the AIM Lead Time (**AIVAL**) and AIM Order Frequency (**AIVAF**) variable files, or from the system-wide default variable fields defined through AIM System Options Maintenance (MENU AIFILE).

This option also:

- Recalculates the forecast, average monthly sales, economic order quantity, average sales quantity, five highest sales, lead time, safety, order point, order quantity and line point.
- Refreshes specific Exceptions.

This reset is run automatically during the AIM Monthly Update (MENU AIMAST). However, AIM provides you with this option should you need to run the reset on demand mid-month or anytime there is a significant change to the variables, which must be applied immediately.

After running this option, any of the following reports may print, if applicable:

- **Advanced Inventory Management Exception Report:** Prints for any items with significant changes to the Order Point/Min and Line Point/Max balances caused by resetting the variables.
- **Safety Stock Audit Report:** Prints for any items with a safety stock that is greater than a given percentage of the minimum on-hand quantity. For more details about this report, refer to Safety Stock Audit Report (MENU AIREPT).
- **Customer Inventory Reservations Exception Report:** Prints all customer inventory reservation exceptions. For more details about this report, refer to Customer Inventory Reservations (MENU OEFILE) in the Infor Distribution A+ Order Entry User Guide.
- **Items That Forecasted Negative Quantities List:** Prints items that had negative quantities generated. Negative quantities are reset to zero, since the system will not allow a forecast quantity less than zero to be created.
- **Minimum/Maximum Balance Calculation Report:** Prints if the item/warehouse [in the Item Balance File, (ITBAL)] that the Order Point/Min and Line Point/Max is being recalculated for is in use by another user.

---

## Reset AIM Variables

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">Reset AIM Variables Screen</a>	Use to set the options for resetting the variables.
<a href="#">Advanced Inventory Management Exception Report</a>	Prints for any items with significant changes to the Order Point/Min and Line Point/Max balances caused by resetting the variables.
<a href="#">Items That Forecasted Negative Quantities List</a>	Prints items that had negative quantities generated.
<a href="#">Minimum/Maximum Balance Calculation Report</a>	Prints if the item/warehouse (in the Item Balance File, <b>ITBAL</b> ) that the Order Point/Min and Line Point/Max is being recalculated for is in use by another user.

---

## Reset AIM Variables Screen

```

                RESET AIM VARIABLES
                Forecast Month: 11/2012

This procedure resets the AIM variables for the current
forecast period, recalculates the forecast, average
monthly sales, economic order quantity, average sales
quantity, five highest sales, lead time, safety, order
point, order quantity and line point.

Reset AIM Variables:      - (Y,N)
  Overlay adjuster set
  lead times:             .. (Y,N)
Recalculate Forecast:     .. (Y,N)
Recalc AMU/EQ/ASQ/SHi:   .. (Y,N)
Recalculate Lead Time:   .. (Y,N)
Recalculate Safety:      .. (Y,N)

Select your options and press F3 or F5.

                                F3=Cancel   F5=Continue

```

This screen appears after you select option **3** - [Reset AIM Variables](#) from MENU AIMAST.

Use this screen to determine what processes will occur when the Reset AIM variables job is run and to recalculate:

- forecast quantities for your items
- average monthly sales
- economic order quantity
- average sales quantity
- five highest sales
- safety
- order point
- order quantity
- line point

At least one field on this screen must be **Y**.

## Reset AIM Variables Screen Fields and Function Keys

Field/Function Key	Description
Forecast Month	<p>The current forecast month and year display at the top of the screen for convenience. This forecast date may be maintained through AIM System Options Maintenance (MENU AIFILE).</p> <p><b>Note:</b> This field displays as blank if AIM Options Maintenance (MENU AIFILE) has not been set up.</p> <p>Display</p>
Reset AIM Variables	<p>Use this field to reset the AIM variable fields (<b>Ordering Frequency</b> and <b>Lead Time</b>) in the Advanced Inventory Balance File (<b>AIBAL</b>). Any of these variable fields that have a maintenance code of <b>A</b> (Automatic) will be reset from the defaults in the AIM Lead Time (<b>AIVAL</b>) and AIM Order Frequency (<b>AIVAF</b>) variable files, or from the system-wide default variable fields defined through AIM System Options Maintenance (MENU AIFILE).</p> <p>Key <b>Y</b> to reset AIM variables.</p> <p>Key <b>N</b> if you do not want AIM variables reset.</p> <p>(A 1) Required</p>
Overlay adjuster set lead times	<p>Use this field to have adjuster set lead times overlaid. Order Point/Min and Line Point/Max balances will be recalculated based on the AIM lead time variable.</p> <p>Key <b>Y</b> to overlay adjuster set lead times. If the <b>Reset AIM Variables</b> field on this screen is also <b>Y</b>, and your lead time variable is <b>9</b> (that is, the <b>Source Code</b> field in Item Balance Maintenance (MENU IAFILE) is <b>9</b> for Average Lead Time Adjuster), this information will be overlaid with the following hierarchy:</p> <ul style="list-style-type: none"> <li>• Warehouse Only</li> <li>• Warehouse and Vendor</li> <li>• Warehouse, Vendor, and Item Class</li> <li>• Warehouse, Vendor, and Item Class/Sub-Class</li> <li>• Warehouse, Vendor, and Purchasing Line</li> <li>• Warehouse, Vendor, Purchasing Line, and Item Class</li> <li>• Warehouse, Vendor, Purchasing Line, and Item Class/Sub-Class</li> </ul> <p>Key <b>N</b> to exclude those records that have a maintenance code of <b>A</b> for automatic and a source code of <b>9</b> indicating Average Lead Time Adjuster. If the <b>Reset AIM Variables</b> field on this screen is <b>N</b>, this field must also be <b>N</b>.</p> <p>(A 1) Required</p>

Field/Function Key	Description
Recalculate Forecast	<p>Use this field to recalculate forecast quantities for your items. The forecast calculation uses demand history, a planning model, smoothing, and the trending factor to predict customer demand.</p> <p>Key <b>Y</b> to recalculate the forecast. The system will determine forecast demand for the next 12/13 periods/months based on previous actual demand.</p> <p>Key <b>N</b> if you do not want to recalculate the forecast.</p> <p>(A 1) Required</p>
Recalculate AMU/ EOQ/ASQ/5Hi	<p>Use this field to recalculate the average monthly usage (AMU), economic order quantity (EOQ), average sales quantity (ASQ), and five high (5-Hi) for items that have been assigned a <b>Line Hit Rank</b> code in the Advanced Inventory Balance File (<b>AIBAL</b>).</p> <p>This field is used in conjunction with five high, threshold, and safety stock. The recalculation that occurs is also based on replenishment options.</p> <p>Key <b>Y</b> to recalculate the AMU, EOQ, ASQ, and 5-Hi.</p> <p>Key <b>N</b> if you do not want to recalculate the AMU, EOQ, ASQ, and 5-Hi.</p> <p>(A 1) Required</p>
Recalculate Lead Time	<p>Use this field to recalculate the lead time for your items. This is the number of days a vendor requires to deliver an item after it is ordered. This data is used in the Order Point/Min and Line Point/Max quantities calculated by Advanced Inventory Management (AIM).</p> <p>Key <b>Y</b> to recalculate the lead time.</p> <p>Key <b>N</b> if you do not want to recalculate the lead time.</p> <p>(A 1) Required</p>
Recalculate Safety	<p>Use this field to recalculate the safety stock quantity for your items. The safety stock quantity of an item in inventory is used as a buffer to compensate for excess customer demand, or longer than usual lead times. Its purpose is to prevent stock outs or backorders, both of which may be damaging to your business. Items with a relatively smooth demand require a minimum safety stock, while items with erratic demand require higher levels.</p> <p>Key <b>Y</b> to recalculate the safety stock quantity.</p> <p>Key <b>N</b> if you do not want to recalculate the safety stock quantity.</p> <p>(A 1) Required</p>
F3=Cancel	<p>Press the <b>F3=CANCEL</b> function key to cancel this option. MENU AIMAST will display.</p>

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Field/Function Key	Description
F5=Continue	<p>Press the <b>F5=CONTINUE</b> function key to run the job.</p> <p>The message “<b>The following jobs have been submitted:</b>” will appear, with the list of jobs that have been submitted. The jobs listed depend upon your selections on this screen. Press <b>ENTER</b> to continue and you will be returned to MENU AIMAST.</p> <p>Reports will be in the default output queue for the user when the job is complete.</p>

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# Advanced Inventory Management Exception Report

AI600 04/19/12 15.21.35		ADVANCED INVENTORY MANAGEMENT EXCEPTION REPORT										I2/APDEMO PAGE 1	
Print All Items		Forecast Period: 12/2011											
		\$ AND % EXCEPTIONS											
		Sort Sequence: \$ Variance											
		-----  Min/Max Balances -----											
Item No.	Item	Model	Forecast	Cost/UM	LT/UM	OF/OL	SL	Old Min/	New Min/	Old Max	New Max	Except.	Amount
Vendor	Class	ID	Quantity										
Buyer: 101 WH: 1 -Hartford, CT													
AF500			File Folders - Manilla	Box of 100 - letter size									
1400	80/3	NCONM2		4.39/EA	.3	1.4	99					\$ %	
				CAS	1.4							\$ %	
AF501			File Folders - Manilla	Box of 100 - letter size									
1400	80/3	NCONM2		4.39/EA	.3	1.4	99					\$ %	
				CAS	1.4							\$ %	
AL810			3M Super 77 Spray Adhesive	All purpose fast drying 12/box									
1600	40	NCONM2		41.88/BOX	.3	1.4	99					\$ %	
				BOX	1.4							\$ %	

This report is produced, if applicable, following your responses on the [Reset AIM Variables Screen](#). This report also prints after running Day-End Processing (MENU XAMAST), if during Day-End Processing you selected **Y** to the **Perform AIM Monthly Update** field.

This report will print for any items with significant changes to the Order Point/Min and Line Point/Max balances caused by resetting the variables. Order Point/Min and Line Point/Max balances are recalculated when the AIM variables are reset through this option and during the AIM Monthly Update (MENU AIMAST).

If the Order Point/Min and Line Point/Max balance change (percent or dollar) exceeds the report limits defined in AIM System Options Maintenance (MENU AIFILE) for a company, the item will print on this report.

This report prints in descending order of absolute value of variance and includes identification of the current forecast period. It is sequenced by buyer, warehouse, and the variance between the old and the new balances. When a buyer or warehouse changes, a new page is printed.

There are four versions of this report:

- 1 The first prints for items whose minimum dollar amount only was exceeded (indicated by \$) or whose minimum dollar amount and minimum percentage amount both were exceeded (indicated by \$%).
- 2 The second prints for items whose minimum percentage amount only was exceeded (indicated by %).
- 3 The third prints for items whose OLD MIN = 0 and NEW MIN > 0.
- 4 The fourth prints for items whose NEW MIN = 0 and OLD MIN > 0.

## Advanced Inventory Management Exception Report

Report/Listing Fields	Description
Headings	<p>Program names appear on the upper left corner of the report followed by run date and time, report title, workstation ID, User ID, and page number.</p> <p>Summary of the selection criteria prints in the center of the headings area followed by the individual field headings.</p>
Forecast Period	The current forecast month and year.
Buyer	The buyer responsible for the item.
Item No.	<p>The item number for which the Order Point/Min and Line Point/Max balance change (percent or dollar) exceeds the report limits defined in AIM System Options Maintenance (MENU AIFILE) for the company.</p>
Vendor	<p>The primary vendor assigned to this item through Item Balance Maintenance (MENU IAFILE).</p>
Item Class	<p>The item class/sub-class assigned to this item through Item Master Maintenance (MENU IAFILE). The item class is a code used to categorize items.</p>
Model ID	<p>The Planning Model ID specified for this item through Item Balance Maintenance (MENU IAFILE).</p>
Forecast Quantity	<p>The forecast quantity of this item for the current month. This is a result of the AIM forecast. If this quantity has been overridden through Monthly Forecast Quantities Maintenance (MENU AIFILE), OVR will print in addition to the forecast quantity.</p>
Cost/UM	The cost of this item, per this default unit of measure.

Report/Listing Fields	Description
Min/Max Balances	<p>The following Order Point/Min and Line Point/Max balance information prints:</p> <ul style="list-style-type: none"> <li>• <b>LT/UM:</b> The lead time, per this unit of measure. The lead time is the number of days a vendor requires to deliver an item after it is ordered. The unit of measure is the item’s default unit of measure.</li> <li>• <b>OF:</b> The order frequency for this item. The order frequency is the number of days between placing purchase orders.</li> <li>• <b>SL:</b> The service level associated with this item. The service level is the target percentage of order quantities that will be available to ship from stock without having to backorder.</li> <li>• <b>Old Min/Old Max:</b> The old order point/minimum balance of this item and the old-line point/maximum balance of this item, before being recalculated.</li> </ul> <p><b>Note:</b> If, after calculations, the old minimum is equal to zero and the new minimum is greater than zero, this exception will be shown on the version of the exception report that has “Old Min = 0, New Min &gt;0” in its header and the min/max columns will be blank.</p> <ul style="list-style-type: none"> <li>• <b>New Min/New Max:</b> The new order point/minimum balance of this item and the new line point/maximum balance of this item.</li> </ul> <p><b>Note:</b> If, after calculations, the new minimum is equal to zero and the old is greater than zero, this exception will be shown on the version of the exception report that has “New Min = 0, Old Min &gt; 0” in its header and the min/max columns will be blank.</p> <ul style="list-style-type: none"> <li>• <b>Except:</b> Indicates how the item exceeded the report limits defined through AIM System Options Maintenance (MENU AIFILE). % prints if the minimum percentage was exceeded; \$ prints if the minimum dollar amount was exceeded; and \$% prints if both minimums were exceeded.</li> </ul>
Amount	<p>The dollar amount or a percentage.</p> <p>When a dollar, the dollar amount is derived from the Average, Standard, or User Cost (determined by the cost to be used in Order Entry) multiplied by the net change between the old and new minimum and maximum quantity balances.</p> <p>When a percentage, the percent of net change in the old and new minimum and maximum quantity balances.</p> <p>Percent or dollar is reflective of what shows in sort sequence at the top of the page in the header.</p>

## Items That Forecasted Negative Quantities List

Item Number		Description		Year	
AI630 04/19/12 15.21.32      ITEMS THAT FORECASTED NEGATIVE QUANTITIES LIST      I2/APDEMO PAGE 1 (NEGATIVES GET ZEROED OUT)					
FORECAST QUANTITIES FORECAST MAINTENANCE CODES					
Warehouse: 1    Hartford, CT					
A200		Sharp Copier Toner xx	SF-7200		2007
PER 01:	A	PER 02: 6 A	PER 03: 3 A	PER 04:	3 A
PER 05:	2 A	PER 06: 2 A	PER 07: 3 A	PER 08:	3 A
PER 09:	A	PER 10: A	PER 11: A	PER 12:	A
PER 13:	A				
- Year Total					
A220		Pocket Planner Weekly Organizer	cool red metal		2003
PER 01:	A	PER 02: 17 A	PER 03: 71 A	PER 04:	A
PER 05:	A	PER 06: 2 A	PER 07: 8 A	PER 08:	A
PER 09:	A	PER 10: 1 A	PER 11: 50 A	PER 12:	162 A
PER 13:	A				
- Year Total					
A240		Single Subject Wire Bound	Notebook		2003
PER 01:	A	PER 02: 74 A	PER 03: 175 A	PER 04:	58 A
PER 05:	12 A	PER 06: 42 A	PER 07: 147 A	PER 08:	218 A
PER 09:	98 A	PER 10: 32 A	PER 11: 11 A	PER 12:	10 A
PER 13:	A				
- Year Total					
A280		#10 Security Tint Envelopes	20# Bond 500/Box		2007
PER 01:	A	PER 02: A	PER 03: A	PER 04:	A
PER 05:	A	PER 06: A	PER 07: A	PER 08:	A
PER 09:	A	PER 10: A	PER 11: A	PER 12:	A
PER 13:	A				
- Year Total					
BRBREPLACEMENT		Replacement Item	Model Z-57		2011
PER 01:	A	PER 02: A	PER 03: A	PER 04:	A
PER 05:	A	PER 06: A	PER 07: A	PER 08:	A
PER 09:	A	PER 10: A	PER 11: A	PER 12:	A
PER 13:	A				
- Year Total					

This listing is produced, if applicable, following your responses on the [Reset AIM Variables Screen](#).

This listing will print those items in which negative forecast quantities were generated, but then zeroed out by the system. The system will not allow a forecast quantity less than zero to be created.

If items with negative demand in months generated forecasts which had to be zeroed out, this listing prints all items that forecast negative quantities. If no items with negative forecast quantities were generated, this listing will still print, however, the message: "No Items Found" will be indicated.

The format of this listing is in warehouse, item number, and year sequence.

### Items That Forecasted Negative Quantities List

Report/Listing Fields	Description
Headings	Program names appear on the upper left corner of the report followed by run date and time, report title, workstation ID, User ID, and page number.  Summary of the selection criteria prints in the center of the headings area followed by the individual field headings.
Warehouse	The warehouse that stocks the item(s).
Item Number	The item number for which a zero out occurred due to this item number forecasting a negative quantity.
Description	The description of the item number.
Year	The forecast year.

Report/Listing Fields	Description
Forecast Quantities	The quantity of this item forecast for each period, based on the sales calendar of the company.
Forecast Maintenance Codes	The code associated with this forecast quantity: <ul style="list-style-type: none"><li data-bbox="578 447 1377 512">• <b>A</b> (Automatic) displays if this quantity has been automatically calculated</li><li data-bbox="578 525 1330 554">• <b>O</b> (Override) displays if this quantity has been overridden</li></ul>

## Minimum/Maximum Balance Calculation Report

AI600B	04/19/12	15:21:34	MINIMUM/MAXIMUM BALANCE CALCULATION	I2/APDEMO	PAGE 1
WORKSTATION ID	WH	ITEM NUMBER	THE FOLLOWING BALANCES WERE NOT AVAILABLE - THEIR BALANCES WERE NOT CALCULATED		
JM	2	A210	Sharp Copier Toner		
JM	3	A210	Sharp Copier Toner		
JM	4	A210	Sharp Copier Toner		
JM	5	A210	Sharp Copier Toner		
JM	1	A220	Pocket Planner Weekly Organizer		
JM	3	A220	Pocket Planner Weekly Organizer		
JM	4	A220	Pocket Planner Weekly Organizer		
JM	44	A220	Pocket Planner Weekly Organizer		
JM	1	A230	Seasonal Christmas Cards		
JM	2	A230	Seasonal Christmas Cards		
JM	5	A230	Seasonal Christmas Cards		
JM	1	A240	Single Subject Wire Bound		
JM	2	A240	Single Subject Wire Bound		
JM	5	A240	Single Subject Wire Bound		
JM	6	A240	Single Subject Wire Bound		
JM	1	A250	Fax Stand - Walnut -----*		
JM	2	A250	Fax Stand - Walnut -----*		
JM	3	A250	Fax Stand - Walnut -----*		
JM	4	A250	Fax Stand - Walnut -----*		
JM	5	A250	Fax Stand - Walnut -----*		
JM	1	A260	#6 3/4 White Envelopes		
JM	2	A260	#6 3/4 White Envelopes		
JM	3	A260	#6 3/4 White Envelopes		
JM	4	A260	#6 3/4 White Envelopes		
JM	5	A260	#6 3/4 White Envelopes		
JM	1	A27	Rebate/Contract		
JM	2	A27	Rebate/Contract		
JM	1	A270	#10 White Envelopes		
JM	2	A270	#10 White Envelopes		
JM	3	A270	#10 White Envelopes		
JM	4	A270	#10 White Envelopes		

This listing is produced, if applicable, following your responses on the [Reset AIM Variables Screen](#).

This listing prints if the item/warehouse (in the Item Balance File, **ITBAL**) that the Order Point/Min and Line Point/Max is being recalculated for is in use by another user. It indicates which balances were not available and therefore their balances were not calculated.

### Minimum/Maximum Balance Calculation Report

Report/Listing Fields	Description
Headings	Program names appear on the upper left corner of the report followed by run date and time, report title, workstation ID, User ID, and page number.  Summary of the selection criteria prints in the center of the headings area followed by the individual field headings.
Workstation ID	The ID of the Workstation that has the Item Balance record in use.
WH	The warehouse number associated with the item for which balances were not available and not calculated.
Item Number	The item number for which balances were not calculated.
Description	The description of the item number.

## Chapter 32 Running the AIM Monthly Update

Use the AIM Monthly Update option on the Advanced Inventory Management Master Menu (MENU AIMAST) to run the AIM Monthly Update procedure. This procedure should be run at the beginning of each month after the last company has been closed through the Sales Analysis Period End Processing (MENU SAMAST). That process updates the current sales period to the next period for Day-End Processing (MENU XAMAST) to post to.

When this procedure is run, the following occurs:

- AIM variables are reset for the upcoming month for each item in the Advanced Inventory Balance File (**AIBAL**). Only those variables which are automatically maintained by AIM (**Maintenance Code is A**) will be reset. Temporary overrides (**Maintenance Codes 1-9**) in the Advanced Inventory Balance File (**AIBAL**) are decremented (gradually decreased) by one month. If the decremented value is zero, the **Maintenance Code** will automatically be changed to **A**. This function does not update those records with historically set lead times. Refer to Reset AIM Variables (MENU AIMAST) of this menu for additional information.
- Forecast quantities are created.
- Order Point/Min and Line Point/Max balances are recalculated for planned items.
- The [Advanced Inventory Management Exception Report](#) is printed, if there are significant changes to the Order Point/Min and Line Point/Max balances. Use this report to view the results of the first planning run and determine if changes are required for an item's variables or planning model. This report is explained in Reset AIM Variables (MENU AIMAST).
- The AIM Safety Stock Audit Report is printed, showing those items which have a safety stock that is greater than a given percentage of the Order Point/Min on-hand quantity. This report is explained in Safety Stock Audit Report (MENU IMREPT) in the Infor Distribution A+ Inventory Management & Planning User Guide.
- The [Items That Forecasted Negative Quantities List](#) is printed, showing any items in which negative forecast quantities were generated, but then zeroed out. The system will not allow a forecast quantity less than zero to be created. This report is explained in Reset AIM Variables (MENU AIMAST).
- Exceptions are refreshed.
- Vendor/Item Master Lead Time is updated. Note that Vendor/Item Lead Time changes will also be tracked, if **Days to Keep Vendor/Item Audit Activity** is greater than **0** in Purchasing System Options Maintenance (MENU XAFILE).
- The AIM Monthly Update procedure runs in your QBATC subsystem.

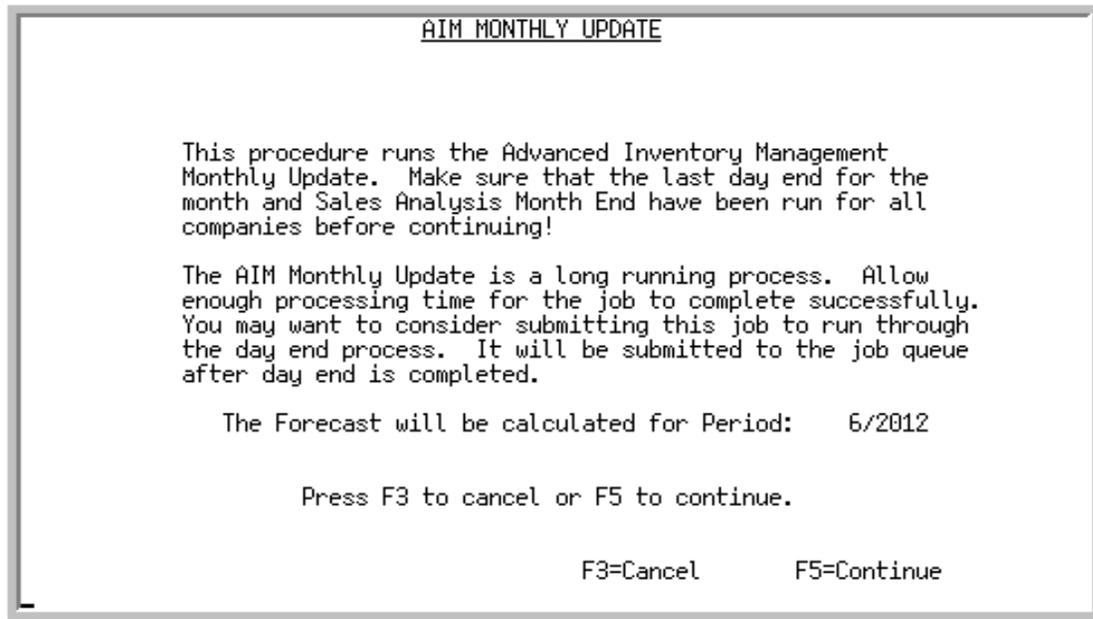
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## AIM Monthly Update

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">AIM Monthly Update Screen</a>	Use to initiate the monthly update.

## AIM Monthly Update Screen



This screen appears after selecting option **4** - [AIM Monthly Update](#) from MENU AIMAST.

Use this screen to perform the monthly update. No prompts or responses are required. Note the forecast date for the upcoming month is displayed for convenience. This date is automatically generated by adding a month to the current forecast date entered on the [Advanced Inventory Management System Options Screen](#) (MENU IMFIL).

The update is run when the **F5=CONTINUE** function key is pressed.

### Important

Before performing the monthly update, verify that Period End Processing (MENU SAMAST) has been run for all companies. If it has not been run, DO NOT proceed with this option until it has been performed for all companies.

---

### AIM Monthly Update Screen Fields and Function Keys

Table heading	Description
The Forecast will be calculated for Period	The forecast date for the upcoming month is displayed for convenience. This date is automatically generated by adding one month to the current forecast period entered on the Advanced Inventory Management System Options Screen in AIM System Options Maintenance (MENU AIFILE). Display
F3=Cancel	Press <b>F3=CANCEL</b> to cancel this option and return to MENU AIMAST.
F5=Continue	Press <b>F5=CONTINUE</b> to run the monthly update. The update is run immediately, and the job is submitted to the job queue. As part of the update process, the <b>Current Forecast Period</b> for AIM will be updated to the next period. When the update is done, the <a href="#">Advanced Inventory Management Exception Report</a> will be in the default output queue of the user, if there are significant changes to the Order Point/Min and Line Point/Max balances. This report is explained in Reset AIM Variables (MENU AIMAST).

## Chapter 33 AIM Global Model Changes

Use the AIM Global Model Change option on the Advanced Inventory Management Master Menu (MENU AIMAST) to change the Model ID in the Advanced Inventory Balance File (AIBAL) for groups of items. The records to be changed can be selected by warehouse, item class/sub-class, item number, and vendor; or, all records can be selected for change.

The Create AIM Balance Records option on this menu will assign the default model set up in AIM System Options Maintenance (MENU AIFILE) to each of your items, when adding new records to the Advanced Inventory Balance File (**AIBAL**). To change this default model for more than one item, this option can also be used if the default model is not the correct one.

After running this option, the [Model ID Group Change Report](#) will print.

### AIM Global Model Change

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">Model ID Group Changes Screen</a>	Use to specify the new model ID and limiting criteria for selecting the items for the model.
<a href="#">Model ID Group Change Report</a>	Prints a list of items that have been assigned a new planning model.

## Model ID Group Changes Screen

MODEL ID GROUP CHANGES

Selection

Warehouse?	_ .	To?	...
Item Class?	... / ...	To?	... / ...
Item Number:	..... To: .....		
Vendor:	.....		
New Model ID?	.....		

F3=Cancel

This screen appears after you select option **5** - [AIM Global Model Change](#) from MENU AIMAST.

Use this screen to specify the new Model ID and limiting criteria for selecting the items for the model. Items may be selected by:

- Warehouse
- Item Class/Sub-Class
- Item Number
- Vendor

Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

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**Model ID Group Changes Screen Fields and Function Keys**

Field/Function Key	Description
Warehouse	<p>The value you enter in this field determines the items that will be assigned the new Model ID. Only those items that match the warehouse or range of warehouses entered will be updated.</p> <p>Key the warehouse or range of warehouses that store the items for which a new Model ID will be assigned.</p> <p><b>Valid Values:</b> A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).</p> <p>(2 @ A 2) Optional</p>
Item Class	<p>The value you enter in this field determines the items that will be assigned the new Model ID. Only those items that match the item class/sub-class or range of item classes/sub-classes entered will be updated.</p> <p>Key the item class/sub-class or range of item classes/sub-classes of the items for which a new Model ID will be assigned. If the sub-class is left blank, all sub-classes within the item class indicated will be included.</p> <p><b>Valid Values:</b> Item classes are defined through Item Class/Sub Class Maintenance (MENU IAFILE) and are assigned to items through Item Master Maintenance (MENU IAFILE).</p> <p>(2 @ A 2 / A 2) Optional</p>
Item Number	<p>The value you enter in this field determines the items that will be assigned the new Model ID. Only those items that match the item number or range of item numbers entered will be updated.</p> <p>Key the item number or range of item numbers for which a new Model ID will be assigned.</p> <p><b>Valid Values:</b> A valid item number defined through Item Master Maintenance (MENU IAFILE).</p> <p>(2 @ A 27) Optional</p>

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Field/Function Key	Description
Vendor	<p>The items selected for a new Model ID by warehouse, item class/sub-class, and item number, may be further limited by selecting only items that are assigned a specific primary vendor.</p> <p>Key the primary vendor assigned to items for which the Model ID will be changed. If left blank, the models for all items within the other selection criteria (warehouse, item class, and item number) will be changed, regardless of their primary vendors.</p> <p><b>Valid Values:</b> A vendor defined through Vendors Maintenance (MENU POFILE/MENU APFILE).</p> <p>(A 6) Optional</p>
New Model ID	<p>Key the new Model ID that will replace the current Model ID for all of the selected items.</p> <p>Assigning a new model indicates that period weight values, smoothing value, and minimum number of months for this model will become the new values used for the selected items in the Advanced Inventory Balance File (<b>AIBAL</b>).</p> <p><b>Valid Values:</b> Any valid model defined in Planning Models Maintenance (MENU AIFILE).</p> <p>(A 6) Required</p>
F3=Cancel	<p>Press <b>F3=CANCEL</b> to cancel this option and return to MENU AIMAST.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The Report Options Screen will appear. Refer to the Infor Distribution A+ Cross Applications User Guide for details about this screen. After making your selections, the <a href="#">Model ID Group Change Report</a> will print.</p>

# Model ID Group Change Report

All Warehouses			All Classes		All Items		All Vendors	
WH	Class	Item Number	Vendor	Model ID	Error			
1	01/09	W1132	IC3000	NCONMO				
1	10/1	A250	400	NCONMO				
1	50/1	A110	100	NCONMO				
1	50/3	A100	100	NCONMO				
1	80/2	A280	200	NCONMO				
1	80/3	A585	1400	NCONMO				
1	80/4	A120	100	NCONMO				
1	80/4	A130	100	NCONMO				

This report prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

Items in the Advanced Inventory Balance File (**AIBAL**) that have been assigned a new planning model are printed.

### Model ID Group Change Report

Report/Listing Fields	Description
Headings	<p>Program names appear on the upper left corner of the report followed by run date and time, report title, workstation ID, User ID, and page number.</p> <p>Summary of the selection criteria prints in the center of the headings area followed by the individual field headings.</p>
WH	The warehouse that stocks the item(s) that have been assigned a new planning model.
Class	The item class and sub-class of the item(s) that have been assigned to new planning models.
Item Number	The number of the item that has been assigned a new planning model.
Vendor	The primary vendor for the item(s) that have been assigned a new planning model.
Model ID	The planning model that is now assigned to each item.
Error	<p>Indicates if the system detected an error while updating the Model ID. The error may be one of the following:</p> <ul style="list-style-type: none"> <li>• Invalid warehouse number</li> <li>• Invalid company in warehouse record</li> <li>• Periods/year for model not equal periods/year for company</li> </ul>

## Chapter 34 Creating AIM Balance Records

Use the Create AIM Balance Records option on the Advanced Inventory Management Master Menu (MENU AIMAST) to create an AIM Balance File record for each Item Balance File record, if the Item Balance File has a valid vendor and the item is not a non-stock item. The records to be created can be selected by warehouse, vendor, item class/sub-class and item number. You can additionally select whether to include only items that are currently planned items, or to include both currently planned and currently unplanned items.

**Note:** In a multi-company environment, be aware of the **Default Model** used in AIM Options Maintenance (MENU AIFILE) on the [Advanced Inventory Management System Options Screen](#). If your companies have different fiscal years (i.e. 12 or 13 periods), you should run this option by warehouse and set the **Default Model** to one that has the correct number of forecast periods per year.

After this option is run, the following may occur:

- The [AIM Balance File Creation Error Report](#) will print. This report shows a list of items for which default planning information was not created because an invalid primary vendor has been assigned to the item in the specified warehouse, or no vendor was assigned to the item.
- The Planning Tool flag in Item Balance Maintenance (MENU IAFILE) will be set to **A** for Advanced Inventory Management, and IM&P data will be deleted for the item and warehouse that is now planned by AIM.

### Create AIM Balance Records

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">AIM Balance File Creation Screen</a>	Use to specify limiting criteria for the items that will be included in the file creation.
<a href="#">AIM Balance File Creation Error Report</a>	Prints a list of items for which default planning information was not created.



## AIM Balance File Creation Screen Fields and Function Keys

Field/Function Key	Description
Warehouse	<p>Key the warehouse or range of warehouses that store the items for which AIM Balance records will be created.</p> <p><b>Note:</b> If your companies have different fiscal years (i.e. 12 or 13 periods), you should run this option by warehouse and set the <b>Default Model</b> on the <a href="#">Advanced Inventory Management System Options Screen</a> to one that has the correct number of forecast periods per year.</p> <p><b>Valid Values:</b> A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY).</p> <p>(2 @ A 2) Optional</p>
Vendor	<p>Key the primary vendor assigned to items for which AIM Balance records will be created.</p> <p><b>Valid Values:</b> A vendor defined through Vendors Maintenance (MENU POFILE/MENU APFILE).</p> <p>(2 @ A 6) Optional</p>
Item Class	<p>Key the item class/sub-class or range of item classes/sub-classes of the items for which AIM Balance records will be created. If the sub-class is left blank, all sub-classes within the item class indicated will be included.</p> <p><b>Valid Values:</b> Item classes are defined through Item Class/Sub Class Maintenance (MENU IAFILE) and are assigned to items through Item Master Maintenance (MENU IAFILE).</p> <p>(2 @ A 2 / A 2) Optional</p>
Item Number	<p>Key the item number or range of item numbers for which AIM Balance records will be created.</p> <p><b>Valid Values:</b> A valid item number defined through Item Master Maintenance (MENU IAFILE).</p> <p>(2 @ A 27) Optional</p>

Field/Function Key	Description
<p>Include only currently planned items</p>	<p>Key <b>Y</b> to include only items that are currently planned items for which AIM Balance records will be created. If you key <b>Y</b>, this allows for the current Planning Tool to be changed to the Planning Tool that this option is being used for (see Note below).</p> <p>Key <b>N</b> to include both currently planned and currently unplanned items for which AIM Balance records will be created. If you key <b>N</b>, this allows for currently unplanned items to now be planned items and change any currently planned items to the Planning Tool that this option is being used for (see Note below).</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• This field resides in both AIM and IM&amp;P.</li> <li>• If this option is run through AIM, an item that is already planned by IM&amp;P can be selected (<b>Planning Tool = I</b> for IM&amp;P) and changed to be a planned item by AIM (<b>Planning Tool = A</b> for AIM).</li> <li>• If this option is run through IM&amp;P, an item that is already planned by AIM can be selected (<b>Planning Tool = A</b>) and changed to be a planned item by IM&amp;P (<b>Planning Tool = I</b>).</li> </ul> <p><b>Default Value:</b> N</p> <p><b>Valid Values:</b> Y or N</p> <p>(A 1) Optional</p>
<p>F3=Cancel</p>	<p>Press <b>F3=CANCEL</b> to cancel this option and return to MENU AIMAST.</p>
<p>Enter</p>	<p>Press <b>ENTER</b> to confirm your selections. The Report Options Screen will appear. Refer the Infor Distribution A+ Cross Applications User Guide for details about this screen.</p> <p>After making your selections on the Report Options Screen, the <a href="#">AIM Balance File Creation Error Report</a> will print.</p>

# AIM Balance File Creation Error Report

Item Number	Warehouse	Invalid Vendor
A100		
A110		
A200		
A210		
A240		
A500		
A510		
A870		
A880		
C130		
C140		
A100		
A110		
A200		
A210		
A240		
A500		
A510		
A870		
A880		
C130		
C140		
A100		
A110		
A200		
A210		
A240		
A500		
A510		
A870		
A880		
C130		
C140		
A100		
A110		
A200		
A210		
A240		
A500		
A510		
A870		
A880		
C130		
C140		

The [AIM Balance File Creation Error Report](#) prints following the Report Options Screen, which is explained in the Infor Distribution A+ Cross Applications User Guide.

This report prints if an invalid primary vendor has been assigned (or a vendor has not been assigned) to one or more items.

The items for which default planning information was not created because an invalid primary vendor has been assigned (or a vendor has not been assigned) to the item in the specified warehouse are printed.

### AIM Balance File Creation Error Report

Report/Listing Fields	Description
Headings	Program names appear on the upper left corner of the report followed by run date and time, report title, workstation ID, User ID, and page number. Summary of the selection criteria prints in the center of the headings area followed by the individual field headings.
Item Number	The item for which an AIM Balance record was not created.
Warehouse	The warehouse in which the attempt was made to create an AIM Balance record for the item.

Report/Listing Fields	Description
Invalid Vendor	<p>The invalid vendor number that exists for this item in this warehouse. A vendor number is invalid if it has not been defined through Vendor Master Maintenance (MENU POFIELD/MENU APFILE).</p> <p>This column is blank if no vendor has been assigned to the item, which will also prevent the AIM Balance record from being created. To specify a valid primary vendor for the item and warehouse so that an AIM Balance record can be created, use Item Balance Maintenance (MENU IAFIELD).</p>

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## Chapter 35 IM&P to AIM File Conversion

Use the IM&P to AIM File Conversion option on the Advanced Inventory Management Master Menu (MENU AIMAST) to create AIM file data using existing IM&P file data.

### IM&P to AIM File Conversion

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">IM&amp;P to AIM File Conversion Screen</a>	Use to create AIM file data using existing IM&P file data.

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## IM&P to AIM File Conversion Screen

IM&P TO AIM FILE CONVERSION

Convert Lead Time Variables (IMVAL):        ..

Convert Order Frequency Variables (IMVAF): ..

Convert IM&P System Options (ORCTL):        .. \* Converted \*

F3=Cancel

This screen appears after you select option **9** - IM&P to AIM File Conversion from MENU AIMAST. Use this screen to create AIM file data using existing IM&P file data.

\* **Converted** \* appears after the field if values have previously been converted from IM&P file data to AIM file data. Note that if you have not run this option yet, but data has previously been entered through regular menu options in AIM, \* **Converted** \* will appear after the applicable field(s) since records exist in the AIM files for those options.

### IM&P to AIM File Conversion Screen Fields and Function Keys

Field/Function Key	Description
Convert Lead Time Variables (IMVAL)	<p>Use this field to determine if IM&amp;P file data for lead time variables will be copied to AIM file data.</p> <p>Lead time is the number of weeks a vendor requires to deliver items against a purchase order. IM&amp;P weeks will be converted into AIM days.</p> <p>Key <b>Y</b> to convert lead time variables from the IM&amp;P Variables - Lead Time File (<b>IMVAL</b>) to the AIM Lead Time Variables File (<b>AIVAL</b>).</p> <p>Key <b>N</b> if you do not want to convert lead time variables from IM&amp;P to AIM.</p> <p><b>Valid Values:</b> Y or N</p>

Field/Function Key	Description
Convert Order Frequency Variables (IMVAF)	<p>Use this field to determine if IM&amp;P file data for order frequency variables will be copied to AIM file data.</p> <p>Order frequency is the number of weeks between placing orders for this item. IM&amp;P weeks will be converted into AIM days.</p> <p>Key <b>Y</b> to convert order frequency variables from the IM&amp;P Variables - Order Frequency File (<b>IMVAF</b>) to the AIM Order Frequency Variables File (<b>AIVAF</b>).</p> <p>Key <b>N</b> if you do not want to convert order frequency variables from IM&amp;P to AIM.</p> <p><b>Valid Values:</b> Y or N</p>
Convert IM&P System Options (ORCTL)	<p>Use this field to determine if IM&amp;P file data for system options will be copied to AIM file data.</p> <p>IM&amp;P system options pertain to all companies using Distribution A+, and include default variables, default model, and default minimum and maximum balance maintenance codes.</p> <p>Key <b>Y</b> to convert IM&amp;P system options from the Order Control File (<b>ORCTL</b>) to the AIM Order Control File (<b>ORCTL</b>).</p> <p>Key <b>N</b> if you do not want to convert IM&amp;P system options from IM&amp;P to AIM.</p> <p><b>Valid Values:</b> Y or N</p>
F3=Cancel	<p>Press <b>F3=CANCEL</b> to cancel this option and return to MENU AIMAST.</p>
Enter	<p>Press <b>ENTER</b> to confirm your selections. The Report Options Screen will appear. Refer to the Infor Distribution A+ Cross Applications User Guide for details about this screen.</p> <p>After the Report Options Screen, you will be returned to MENU AIMAST.</p>

## Chapter 36 Activating AIM

Use the Activate AIM option on the Advanced Inventory Management Master Menu (MENU AIMAST) to activate Advanced Inventory Management after its initial installation. Prior to running this option, AIM System Options must have been defined through AIM System Options Maintenance (MENU AIFILE).

Before you begin using AIM, you must supply the closing month and year of the last company closed through Period End Processing (MENU SAMAST) in the Sales Analysis module. To determine what the current period is for all companies, refer to the Start IM&P setup step of the IM&P Checklist in the Infor Distribution A+ Cross Applications User Guide. Once you have determined the month and year needed, you must activate AIM through this option and key the data.

**Note:** This process can only be run once and must be run before you can begin planning items with AIM. Also, once AIM has been started, the **Plan (Y/N)** field in Item Balance Maintenance (MENU IAFILE) will exist. The Create AIM Balance Records (MENU AIMAST) for your items can only be run after Activate AIM has been executed.

If this option has already been run and an attempt is made to run it again, an error message will be presented.

### Activate AIM

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
<a href="#">Activate Advanced Inventory Management Screen</a>	Use to activate AIM and specify the month preceding the first forecast month.

## Activate Advanced Inventory Management Screen

ACTIVATE ADVANCED INVENTORY MANAGEMENT

Month preceding the first forecast month: 0312 (MMYY)

Key the month and year that will precede the first month forecasted.

If Advanced Inventory Management is being installed simultaneously with all other applications, key the last month and year.

F3=Cancel      F5=Process

This screen appears after you select option **10** - [Activate AIM](#) from MENU AIMAST.

Use this screen to activate AIM. You must key the month and year of the last Sales Analysis Calendar Period End Processing, regardless of whether your business operates on a calendar basis or a fiscal basis.

### Example:

If your business runs on a calendar year and you are installing AIM in February of 2012, and the last Period End Processing was performed for January of 2012, you would fill the field on the prompt screen with 01 for the month and 12 for the year.

If your business runs on a fiscal year and your year runs from July 2012 through June 2013, and you are installing AIM in February of 2012, and the last Period End Processing was performed for calendar January 2012, you would still fill the field on the prompt screen with 01 for calendar month and 12 for the year.

### Activate Advanced Inventory Management Screen Fields and Function Keys

Field/Function Key	Description
Month Preceding the first forecast month	Use this field to identify the last full month/year (MMYY format) that will be closed before the first AIM Monthly Update (MENU AIMAST) will be run. The system will use the next month as the first month to be forecast through AIM. See example on previous page. <b>Default Value:</b> Last Month (N 4,0) Required

Field/Function Key	Description
F3=Cancel	Press the <b>F3=CANCEL</b> function key to cancel this option and return to MENU AIMAST.
F5=Process	Press the <b>F5=PROCESS</b> function key to activate AIM. When the update is done, MENU AIMAST will display. The <b>F5=PROCESS</b> function key does not appear if AIM has already been activated. An error message will also display indicating that AIM has already been activated.

## Glossary

Adjusted Values	Are those that are calculated considering the threshold, average sales quantity, and five-high (5-Hi) quantity factors into the resulting Order Point.
Adjuster Parameters	Provide you with the option of modifying the calculated order point by instituting Average Sales Quantity (ASQ) and Five-high Quantity (5-Hi) factors into the resulting order point. This will allow you to better manage products that experience exceptional usage, better manage customer buying habits on a product-by-product basis (since the order point is adjusted on products based on customer's actual buying habits) and improve customer service.
AIM Balance Information	Information stored in the AIM Balance File for an individual item in a warehouse. Also called planning information, it is used by AIM to perform sales forecast and stocking level calculations. AIM Balance information is maintained through Item Balance Maintenance (MENU IAFILE).
AIM Variables	The AIM variables are lead time and order frequency. They are referred to collectively although each variable is maintained separately from the File Maintenance Menu (MENU AIFILE). These variables are used by AIM to calculate an item's forecast usage, Order Point/Min, and Line Point/ Max.
AMU	The average month's usage (AMU) of an item.
Average Lead Time	The number of days required for you to receive an item from the time that its purchase order was issued. This field displays the average lead time, calculated from the purchase order receipt history.
Average Monthly Days	The average number of days in a month. This value will be used in multiple calculations throughout AIM.
Average Sales Quantity (ASQ)	Determined by dividing the Usage by Line Hits. If the ASQ calculation is greater than the calculated order point, the order point can be adjusted to the ASQ value if other order adjusters are not greater.

Calendar Type	The appropriate calendar type reference number which defines the schedule used to close months in Sales Analysis. AIM supports five types of calendars: Calendar type 1 is for a 13 period fiscal year with each period being four weeks long. Calendar type 2 assumes the first month of each quarter is five weeks and the other two are four weeks. Calendar type 3 assumes the first period in a quarter is four weeks, the second is five and the third is four.
Calendar type	4 assumes the first period in a quarter is four weeks, the second is four and the third is five. Calendar type 5 assumes that the month ends on the last business day of each calendar month.
Carrying Cost Percent	The average cost percentage which is incurred for holding an item in inventory (values include cost of capital, warehouse space, insurance, handling, etc.). This percentage of inventory value is used to determine the cost for holding the inventory in stock.
Critical Point	Calculated as the order point minus safety allowance, and is stored in the Advanced Inventory Balance File ( <b>AIBAL</b> ).
Current Forecast Period	Reflects the calendar date, regardless of whether your business operates on a calendar basis or a fiscal basis. The value of this field impacts how forecasting variables are calculated.
Demand	$\text{Demand} = \text{Net Sales} + \text{Demand Adjustments} + \text{Warehouse Transfer Sales} + \text{Replacement Sales} + \text{Component Sales}$ .
EOQ	The Economic Order Quantity (EOQ).
Exceptions	Messages to notify the buyer when a product's ordering controls have been automatically adjusted, or when products have met or exceeded certain thresholds.
Five High (5-Hi)	Determined by reviewing the highest sales for all months included in the usage calculation to arrive at the five highest sales quantities. The highest quantity is removed, and then the remaining sales are added together and divided by the number of high sales used. If this average is greater than the calculated order point, the order point can be adjusted to equal this value if other order adjusters are not greater. The adjustment must not exceed the maximum dollar difference for the Five-high adjustment.
Forecast Maintenance Code	The code associated with this forecast quantity: A (Automatic) indicates a quantity has been automatically calculated; O (Override) indicates if this quantity has been overridden.
Forecast Quantity	The quantity of this item forecast for each period.
Interactive Forecasting	Allows for interactive forecasting of a planning model for a specific item, assisting you to forecast items using different planning models. This function can forecast sales for the next 12 months using the past 12 months of demand history (including both system generated and manual adjustments).

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Item Line Rank	The sequential number that is assigned to the item based on the total Line Hits for this item in this warehouse. It will be in order of the greatest amount of Line Hits to the least amount of Line Hits. It ensures that products with a higher volume of sales are ranked higher, and that replenishment controls are in place to ensure there is always adequate stock levels for the higher ranked products. The rank value is located in the Advanced Inventory Balance File (AIBAL). Possible values are blank, and the number of detail ranks you specified to use (1-26 = A-Z), as set up through Replenishment Options Maintenance (MENU AIFILE).
Lead Time	The number of days a vendor requires to deliver an item after it is ordered. This data is used in the Order Point/Min and Line Point/Max quantities calculated by Advanced Inventory Management (AIM).
Lead Time Days	The number of days a vendor requires to deliver items against a purchase order.
Line Hit Type	The type of system Line Hit. The type may be one of the following: <b>Sale</b> (regular sale), <b>Lost</b> (lost sale), and <b>Excp</b> (exception sale).
Line Hits	The number of times a product appears on a sales order, warehouse transfer, or lost business transaction, regardless of quantity. By tracking a product's Line Hits, items can then be ranked based on these 'hits' (or the volume of transactions the item appears on) and categorized by the use of a rank code.
Line Point	The highest desired quantity of an item that should be on-hand at any time. If an item exceeds this quantity, it is in danger of being overstocked, causing inefficient utility of storage.
Low Usage Order Point Adjuster	Used to keep inventory on hand for an item that is experiencing low usage. With the Low Usage Order Point Adjuster, the order point will be adjusted to 1, if it was calculated to be zero (due to the low usage of the item).
Order Frequency	An AIM variable that indicates the number of days between placing purchase orders for an item. The order frequency should allow enough time between orders to allow each purchase order to exceed the vendor weight and monetary amount minimums. These minimums are defined in Vendor Master Maintenance (MENU POFILE).
Order Point	The lowest stock quantity on-hand of an item allowed before requiring more of the item be ordered. If an item falls below its order point/minimum balance, it is in danger of stocking out.
Percent of Minimum	The percentage of Minimum for the SS Qty, calculated as: $SS\ Qty / Minimum\ Balance$ .

Planning Model	Use to determine which months of the demand history to use, and their relative importance when forecasting monthly usage. It defines the relative weights for up to 36 months (or 39 periods) of demand history. These weights indicate how each period of history influences the sales forecast. Demand history for periods that are not assigned weights are not considered in the item's forecast. Planning models also contain a smoothing factor.
PO Processing Cost	The average cost to create a purchase order (the total cost associated with creating, reviewing, approving, printing, mailing, tracking and receiving inventory from a purchase order).
Purchasing Lines	Provide you with a way to group like items together, for purchasing purposes.
Raw Values	Those that are calculated before the Order Point Adjuster field was considered, if applicable.
Reason Codes	Reason codes, defined through AIM Usage Override Reason Codes Maintenance (MENU AIFILE), allow you to identify the reason of a usage override performed during Replenishment Options Maintenance (MENU AIFILE), when an adjustment is being written to the Item Sales Demand Manual Adjustments File (ITADJ).
Replenishment	The inventory replenishment process considers a variety of criteria such as on-hand inventory, customer demand, and supplier lead times to calculate requirements. Replenishment options allow for greater control over these parameters used for the Order Point/Min and Line Point/Max calculations, which will drive the inventory replenishment processes.
Safety Stock	The quantity of an item in inventory that is used as a buffer to compensate for excess customer demand, or longer than usual lead times. Its purpose is to prevent stockouts or backorders, both of which may be damaging to your business. Items with a relatively smooth demand require a minimum safety stock, while items with erratic demand require higher levels.
Safety Stock (SS) Cost	The <b>Safety Stock Cost</b> , calculated as: <b>Safety Stock Quantity * Cost of Item</b> .
Source	The reason of the system Line Hit. The source may be <b>Line</b> (regular sale) or <b>Comp</b> (component).

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Source Codes	<p>Represent how variables are defined for groups of items, as follows:</p> <ul style="list-style-type: none"><li>0 = Override</li><li>1 = WH, Vendor, Class/Sub</li><li>2 = WH, Vendor, Class</li><li>3 = WH, Vendor</li><li>4 = WH, Class/Sub</li><li>5 = WH, Class</li><li>6 = WH</li><li>7 = System default</li><li>9 = Average Lead Time Adjuster</li><li>A = Safety Stock Adjuster</li><li>B = Order Point Adjuster</li><li>C = WH, Vendor, PLine, Class/Sub</li><li>D = WH, Vendor, PLine, Class</li><li>E = WH, Vendor, PLine</li></ul>
Standard Deviation	<p>The standard deviation for an item as determined by the forecast. Standard deviation is a measure of the variability of the item's demand history. An item with stable sales will have a standard deviation lower than that of an item with erratic sales.</p>
Trending Factor	<p>Used in the forecast calculation to determine how trends of demand history will be used. The dampening factor can vary between 00 (no trending - eliminating trend detection in the forecast), and 1.0 (complete trending - continuing with the trend without reducing it over the next 12 months).</p>
Unit Method	<p>Defines which units of measure (UOM) for a product will be reviewed when determining if a warehouse transfer quantity of that item should be rounded. You will be able to select the: buy unit of measure from the warehouse transfer's vendor's <b>VNITM</b> record, referred to as the "Transfer Unit," and the buy unit of measure from the warehouse transfer's purchasing vendor's <b>VNITM</b> record, referred to as the "Buying Unit".</p>