



# Infor System21 Style Distribution Requirements Planning

Product Guide

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## About this guide

The purpose of this document is to describe the functions that can be used within the Style Distribution Requirements Planning Module.

## Intended audience

The guide is intended for any users of the STDR Style Distribution Requirements Planning business module.

## Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in the "Contacting Infor" section.

## Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at [www.infor.com/inforxtreme](http://www.infor.com/inforxtreme).

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

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



## Introduction

Distribution Requirements Planning provides the necessary data for matching [customer demand](#) with the [supply](#) of products at various stages in the physical distribution system.

DRP helps to anticipate future requirements, effectively deploy Inventory to meet [customer](#) requirements, and more rapidly adjust to a constantly changing market place.

DRP is one of the Advanced Application modules which extend the functionality of the Base application modules.

The modules which are prerequisite for DRP are:

- Inventory Management
- Sales Order Processing
- Purchase Management
- Requisitioning
- General Ledger
- Accounts Receivable
- Accounts Payable

DRP also interfaces with Warehousing, Production, World Trade and Forecasting.

Before you use DRP, you must plan carefully. Consider your supply chain [network](#) and the flow of products between sites, particularly the relationship between distribution [centres](#) and stockrooms.

# Preparing to Use DRP

As this is an advanced application module, you set up most of the primary data through the base modules. However, to get maximum benefit from the module, you must define additional reference data specific to DRP.

After installation, the recommended implementation steps for DRP are listed below, in brief:

**Note:** Only steps 1-11 are mandatory

- 1 Within Sales Order Processing, create [customer](#) records for each stockroom, with a delivery address number of 001.
- 2 Make sure the necessary processing profile records are in Inventory. Refer to the Inventory Management product guide (Utilities section) for further details.
- 3 Create the DRP company profile record, using the same company code as the one defined to Inventory Management.
- 4 Create the DRP [calendars](#) for this year and any subsequent years.
- 5 Create the DRP [networks](#) and define how and when they are processed.
- 6 Create the DRP period records for each [centre](#) and DC.
- 7 Create the DRP stockroom records for each [centre](#) and DC.
- 8 Assign the internal [customer](#) number to the stockroom within DRP [Customer](#) Maintenance.
- 9 Create the DRP [network](#) and [planner](#) records.
- 10 Define the item to all stockrooms at [centres](#) and DCs via Inventory Management.
- 11 Create the [Distribution Item](#) Master file records for every [centre](#) or DC that handles the item.
- 12 Create item group profiles and [forecasts](#).
- 13 Create seasonal profiles.
- 14 Generate item sales [forecasts](#).
- 15 Maintain the generated sales [forecasts](#), where appropriate.
- 16 If you require stock building, enter the item group stock level parameters and create item stock levels.
- 17 Maintain the generated item stock level forecast, where appropriate.
- 18 If you require the supplier [schedule](#) report, define supplier [schedule](#) profiles.

**Note:** If you create sales [forecasts](#) in Forecasting, you do not need to carry out steps 12-14. However, if you maintain seasonal profiles, Forecasting applies them when you transfer the DRP [forecasts](#).

**Note:** You can run DRP based on actual [demand](#) only (excluding [forecasts](#)).

### Calendars [1/STDRM]

Use this task to maintain the [calendars](#) for all sites within the company.

The Distribution Requirements Planning module allows you to use one [calendar](#) for a whole company or different [calendars](#) for each [centre](#) or DC.

For each [calendar](#), you can maintain up to five weekly templates, specifying periods when the [calendar](#) works differently from usual, the working days and the dates to which it applies.

You can define the [calendar](#) codes here and assign them to individual sites via the Periods task.

**Note:** Before generating a new [calendar](#) year, review the [calendar](#) details on the Company Profile (the working days) to make sure that they are accurate for this particular year.

### Calendar Maintenance Selection Window

To display this window, select the [Calendars](#) task.

Use this window to select a [calendar](#) to maintain or to enter a new [calendar](#).

#### **Fields**

##### **Enter Calendar Code**

To maintain an existing [calendar](#), enter the [calendar](#) code.

To add a [calendar](#), enter a new code.

##### **Year**

Enter the [calendar](#) year.

##### **Based on Calendar**

You can optionally enter an existing [calendar](#) on which to base the new [calendar](#). This saves you from entering information again and you can make any adjustments on the [Calendar Maintenance Holidays](#) window.

#### **Options**

**Select**

Use this to maintain the [calendar](#).

**Delete**

Use this to delete the [calendar](#). A confirmation pop-up is displayed.

**Print**

Use this to print the details of the [calendar](#).

Select an existing [calendar](#) or enter a new [calendar](#) code or year and press Enter to display the [Calendar](#) Maintenance Holidays window.

## Calendar Maintenance Holidays Window

To display this window, either enter a new [calendar](#) code or year and then press Enter or select an existing [calendar](#) on the [Calendar](#) Maintenance Selection window.

You use this window to enter the [calendar](#) start date and all the company-wide holidays for this [calendar](#), such as bank holidays.

**Fields****Start Date**

Enter or select the date of the first Monday of the year.

**Holidays From**

Enter or select the start date for the holiday.

**Holidays To**

Enter or select the end date for the holiday.

***Note:** Holidays must not overlap.*

**Functions****Error Type (F6)**

Use this to display the Error Type pop-up. Errors are displayed as a code in the Error field and the Error Type pop-up shows the meaning of each code.

**Maintain Week Templates (F13)**

Use this to display the [Week Templates](#) window.

Select **Update (F8)** to update the [calendar](#) holiday records. DRP audits all updates.

## Error Type Pop-up

To display this pop-up, select **Error Type (F6)** on the [Calendar](#) Maintenance Holidays window. It is only displayed if there is an error on the window.

A list of possible error codes and their meaning is displayed.

Press Enter to continue.

## Calendar Maintenance Week Templates Window

To display this window, select **Maintain Week Templates (F13)** on the [Calendar](#) Maintenance Holidays window.

You use this window to maintain up to five weekly templates for the [calendar](#). This is optional, but it can be useful for time periods when the [calendar](#) will operate differently, for instance, when there will be fewer working days than usual.

This displays any existing [week templates](#). Each template indicates which days of the week are working days. The top right-hand corner of the window shows the default Week Template.

**Note:** *If there is no weekly template defined for a particular date, DRP uses the company-level default template.*

### **Fields**

#### **Start Date**

Enter or select the start date.

#### **MTWTFSS**

These represent Monday through to Sunday.

Enter **N** beneath any non-working day. Leave working days blank.

#### **From Date**

Enter or select the effective start date for this template.

#### **To Date**

Enter or select the effective end date for this template.

**Note:** *Effectivity dates must not overlap.*

Select **Update Week Templates (F8)** to update the [calendar](#) template records. DRP audits all updates.

## Periods [2/STDRM]

Use this task to define the time slots, or periods, over which you want to assess [supply](#) and [demand](#).

You set up periods for each [centre](#) or DC individually, but you can amend them before any processing run. You define the periods in terms of [calendar](#) days and associate them with a particular [calendar](#).

This is the first stage in defining a new [centre](#) or DC. Conversely, it is the last stage in deleting one.

## Maintain Periods Selection Window

To display this window, select the Periods task.

Use this window to select the [centre](#) or DC for which you want to set up periods.

### **Fields**

#### **Centre/DC**

Enter the [centre](#) or DC for which you want to create or amend periods.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

Enter the [centre](#) or DC code and then press Enter to display the Maintain Periods Details window.

## Maintain Periods Details Window

To display this window, enter a [centre](#) or DC code and then press Enter on the Maintain Periods Selection window.

You use this window to associate a [calendar](#) with a [centre](#) or DC, and define the periods to be analysed by DRP for this site.

### **Fields**

#### **Calendar Code**

Enter a [calendar](#) code

Alternatively, use the prompt facility to select from the Select DRP [Calendar](#) pop-up.

#### **1 - 46**

You can specify up to 46 different periods, defined in [calendar](#) days. The periods represent the time slots over which [supply](#) and [demand](#) will be assessed. Typically, they will be short to begin with, followed by longer periods and then longer periods again. The earlier periods represent the very near future and the later periods the more distant future.

The assumption is that less detail is required in the more distant future, where requirements may be more tentative.

For example, the initial four periods might be short (just two days), the next four periods could be slightly longer (seven days) and the periods might then get longer still as you move through the 46 fields.

Enter the length of each period in each numbered field.

**Note:** Remember, these periods are not related to Inventory or Financial periods; they are specifically *DRP planning periods*.

Select **Update (F8)** to update the period details. *DRP audits all updates.* The Maintain Periods Selection window is re-displayed. Select **Exit (F3)** to leave the task.

## Stockrooms [3/STDRM]

You use this task to define Inventory stockrooms to [centres](#) or DCs.

This defines the stockrooms associated with a site and controls which stock balances, [demands](#) and [supply](#) orders *DRP* considers during a planning run. You can define any number of stockrooms to a [centre](#) or DC. If a [centre](#) or DC only includes a single stockroom, you can use the same code for the [centre](#) or DC as for the stockroom.

**Note:** You must have already defined the stockrooms to *Inventory Management* and specified periods for the [centre](#) or DC. You must also have assigned each stockroom a *SOP dummy internal customer number*, to reflect [distribution orders](#) raised for that stockroom.

For planning purposes, you can associate multiple stockrooms with a distribution [centre](#), yet for any item you can only define only one stockroom as the primary receiving and issuing store.

## Maintain *DRP* Stockrooms Selection Window

To display this window, select the Stockrooms task.

You use this window to select the [centre](#) or DC and to choose whether to include all stockrooms.

### **Fields**

#### **Centre/DC**

Enter a [centre](#) or DC code with defined periods.

Alternatively, use the prompt facility to select from the Select *DRP* [Centre/DC](#) pop-up.

#### **Include all Stockrooms**

Select one of the following:

No (0) - Not to include all Inventory stockrooms

Yes (1) - To add all Inventory stockrooms to a [centre](#) or DC

Press Enter to display the Maintain *DRP* Stockroom Details window.

## Maintain DRP Stockrooms Details Window

To display this window, enter a [centre](#) or DC code and then press Enter on the Maintain DRP Stockrooms Selection window.

You use this window to enter the stockrooms to define to the [Centre](#) or DC. If you have already defined stockrooms to this [centre](#) or DC, they are displayed.

### Fields

#### **Stockrooms**

Enter the codes of the stockrooms to be defined to this [centre](#) or DC.

Alternatively, use the prompt facility to select from the Select Inventory Stockroom pop-up.

**Note:** Select **Delete (F11)** to remove the [centre](#) or DC and all its associated stockrooms permanently.

Select **Update (F8)** to update the displayed stockrooms. Then select **Exit (F3)** to leave the task.

## Customers [4/STDRM]

You process [distribution orders](#), created through DRP, through the Sales Order Processing module in a similar way to normal sales orders.

Therefore, you must set up an internal [customer](#) account in Sales Order Processing, for each stockroom that is to [supply](#) DCs in the DRP [network](#). The internal [customer](#) must have a delivery address sequence number of 001.

This task defines internal [customer](#) codes to stockrooms for DCs to generate order details and despatch documentation that support stock transfer between [centres](#) and DCs.

## DRP Stockroom/Customer Maintenance Selection Window

To display this window, select the [Customers](#) task.

You use this window to select the DRP stockroom and [customer](#) you want to maintain. All Inventory stockrooms used by DRP are displayed.

### Options

#### **Select**

Use this to select the stockroom you want to maintain.

Select a stockroom to display the DRP Stockroom/[Customer](#) Maintenance Details window.

## DRP Stockroom/Customer Maintenance Details Window

To display this window, select a stockroom on the DRP Stockroom/ [Customer](#) Maintenance Selection window.

You use this window to enter the dummy internal [customer](#) code, which holds [distribution orders](#) for receipt at this stockroom.

### Fields

#### **Internal Customer**

Enter the [customer](#) code to use when you enter a [distribution order](#) with this stockroom as its destination.

Alternatively, use the prompt facility to select from the Select [Customer](#) pop-up.

**Note:** You must have already set up the internal [customer](#) code in Sales Order Processing with a delivery sequence of 001.

Press Enter to save the details and then select **Exit (F3)** to leave the task.

## Network Maintenance [5/STDRM]

Use this task to define the overall [supply](#) chain relationship. You can use it to define DRP [networks](#) and the relationships between [centres](#) and DCs within those [networks](#). A DRP [network](#) consists of one [centre](#) and any number of distribution [centres](#) (DCs) supplied by that [centre](#). You can define a [centre](#) or DC to more than one [network](#).

You can define multiple [networks](#) for a company and include sites in more than one [network](#), normally as a [centre](#) on one level and as a DC on another.

**Note:** You must have previously defined periods and stockrooms for each [centre](#) and DC you use here.

## Maintain DRP Networks Selection Window

To display this window, select the [Networks](#) task.

You use this window to enter or select the [network](#) to maintain.

### Fields

#### **Network Code**

Enter an existing [network](#) code or enter a new code to add a [network](#).

Alternatively, use the prompt facility to select from the Select DRP [Networks](#) pop-up.

Press Enter to display the Maintain DRP [Networks Centre](#) Detail window.

## Maintain DRP Networks Centre Detail Window

To display this window, enter or select a [network](#) code and then press Enter on the Maintain DRP [Networks](#) Selection window.

You use this window to maintain the [centre](#) code and descriptions for this [network](#).

### **Fields**

#### **Description (Network Code)**

Enter the description for the [network](#) code you have entered.

#### **Centre for Network**

Enter a [centre](#) code. This is the [network centre](#).

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

#### **Description (Centre)**

Enter a description of the [network centre](#).

Press Enter to update the DRP [Network](#) file with the [centre](#) code and descriptions. DRP audits updates to the [Network](#) file.

## Maintain DRP Networks DCs Detail Window

To display this window, press Enter on the Maintain DRP [Networks Centre](#) Detail window.

You use this window to maintain the DC details for the selected [network](#).

### **Fields**

#### **Line**

If you are maintaining an existing [network](#), enter the line number of the DC you want to amend.

#### **DC**

Enter a DC or [centre](#) to add to this [network](#).

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

#### **Desc**

Enter a description for the DC or [centre](#).

### **Functions**

#### **Delete (F11)**

To delete a [centre](#) or DC from the [network](#), enter the relevant line number and select **Delete (F11)**.

If you do not enter a line number and you select **Delete (F11)**, you delete details for the whole [network](#). Select **Delete (F11)** a second time to confirm the update.

Select **Update (F8)** to save the [network](#) details.

## Distribution Item Master [6/STDRM]

You use this task to maintain additional specific distribution details, in order to use Inventory items effectively within DRP.

You must maintain this information for each site; this means each [centre](#) or DC handling the item. The site can be a distribution or a retail outlet for the item.

**Note:** *If you manufacture the item, you only need to define it to DRP at its retail DCs. Define the manufacturing [centre](#) and its items in Production. The MPS or MRP modules then treat the [centre](#) as a model.*

## Distribution Item Master Selection Window

To display this window, select the [Distribution Item](#) Master task.

You use this window to enter the item you want to maintain.

**Note:** *To use the standard Inventory item prompt, select **Inventory Item Search (F16)**.*

### **Fields**

#### **Centre/DC**

Enter a [centre](#) or DC with periods and stockrooms defined.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

#### **Item**

Enter an item code.

Alternatively, use the prompt facility to select from the Select DRP Items for [Centre/DC](#) pop-up.

#### **Option**

Select one of the following to specify the way in which to maintain the [Distribution Item](#) Master file:

Interactive style or item maintenance (1) - To maintain the style or item interactively

Create item records from the style (2) - To create item or SKU level records from existing style-level [Distribution Item](#) Master file records

Copy style and item records (3) - To copy style and item stockroom records you have already created from one stockroom to another

**Based On**

This allows you to copy [Distribution Item](#) Master details that you have already entered for a different item or style. You must have entered an item code and selected **Interactive style or item maintenance** in the Option field.

**Functions****Inventory Item Search (F16)**

Use this to select the standard Inventory item search facility, for all items within the company.

Press Enter to display the [Distribution Item](#) Master File Maintenance window.

## Distribution Item Master File Maintenance Window

To display this window, enter an item code and a [centre](#) or DC and then press Enter on the [Distribution Item](#) Master Maintenance window.

**Note:** *This window is displayed if you have selected Interactive style or item maintenance in the Option field on the [Distribution Item](#) Master Selection window or if you are using the Based On facility.*

**Note:** *The item details and the [centre](#) or DC are displayed here, as entered on the previous window. The date on which the item was last planned is also displayed for information.*

**Fields****Source of Supply**

Select one of the following:

Local (1) - If you purchase the item locally, that is, as a DC you purchase the item directly, rather than it being supplied by a [supply centre](#)

Central (2) - If the item is supplied centrally, that is, it is purchased, or manufactured, or supplied by a [centre](#) defined to DRP or Production

**Planner**

Enter the [planner](#) responsible for this item on this site.

Alternatively, use the prompt facility to select from the Select [Planner](#) pop-up.

**DRP Forecast**

[Forecasts](#) are not mandatory in DRP.

Select one of the following:

None (0) (default) - Not to use [forecasts](#) at all

In this case, DRP only considers actual orders.

Sales (1) - To use sales [forecasts](#) only for this item

Stock (2) - To use stock level [forecasts](#) only for this item

Both (3) - To use both sales [forecasts](#) and stock levels for this item

### Forecast Error Tolerance % Absolute

The Forecast Error Tolerance Percentage Absolute field is not supported by Style Distribution Requirements Planning.

### Forecast Profile

If you use [forecasts](#) in DRP, enter the default seasonal profile used as a template to break down sales [forecasts](#), and maintain stock levels, from period, to weekly and daily level. You can override this default during forecast processing.

You can use the prompt facility to select from the Select Seasonal Index pop-up.

### Order Policy

Select one of the following [order policy](#) codes:

Code	Description	Mandatory Quantities
A	Discrete DRP suggests an order for the actual quantity required, regardless of other factors.	None
B	Discrete above minimum DRP suggests an order for the actual quantity required, if greater than the suppliers minimum order quantity.	Minimum order quantity
D	Fixed quantity DRP suggests a fixed order quantity of this item, regardless of other factors, for example, forecasts or stock levels.	Fixed order quantity
G	Number of day's supply DRP accumulates the requirements over the specified days and suggests an order quantity to satisfy this demand.	Number of day's supply
H	Fixed quantity above minimum The suggested order quantity must be greater than minimum and divisible by the multiple quantity.	Minimum order quantity Multiple order quantity

**Note:** You can enter a value in either the Min Order Qty field or the Use Inventory Order Qty field. You must specify a minimum order quantity for order policies Discrete above minimum (B) and Fixed quantity above minimum (H).

### Min Order Qty

Enter the minimum quantity that DRP suggests for replenishment of this item. If the re-order quantity calculated by DRP is less than this minimum, DRP uses the latter. This applies only to order policies **Discrete above minimum (B)** and **Fixed quantity above minimum (H)**.

**Max Order Qty**

Enter the maximum quantity that DRP suggests for replenishment of this item. If DRP calculates the re-order quantity as greater than this maximum, the DRP [planner](#) action report highlights it.

If specified, DRP uses this maximum order quantity regardless of the [order policy](#) specified for the item.

**Fixed Order Qty**

Enter the fixed re-order quantity DRP should suggest for this item.

If the required quantity is greater than the fixed order quantity, DRP suggests multiples of the fixed order quantity to satisfy the [demand](#).

**Note:** *If you have specified [order policy](#) Fixed quantity (D), you must enter a fixed order quantity greater than zero.*

**Inventory Order Quantity**

Select one of the following:

Economic Order Quantity (1) - To use the economic order quantity as the DRP minimum order quantity

Reorder Quantity (2) - To use the Inventory re-order quantity as the DRP minimum

Leave this field blank to use neither.

**Mult Order Qty**

Enter a multiple order quantity. DRP suggests multiples of this quantity for the re-order quantity.

**Note:** *If you have specified [order policy](#) Fixed quantity above minimum (H), you must enter a multiple order quantity greater than zero.*

**Safety Stock**

If you do not need to calculate the [safety stock](#) during DRP processing, enter the fixed quantity of [safety stock](#) here.

**Days Supply**

Enter the number of days for which DRP totals the requirements and raises a single order to meet them.

**Note:** *If you have specified [order policy](#) Number of days [supply](#) (G), you must enter a number of days.*

**Local Stockroom**

Enter a stockroom code. You must have defined the stockroom to the item in Inventory and to the [centre](#) or DC in DRP. DRP updates on-order and in-transit quantities against this stockroom for the item. This is the primary stockroom for the item at this [centre](#) or DC.

You can use the prompt facility to select from the Select Stockroom/Item pop-up.

## Time Fence Days

Enter the number of days forward, from the current date of a DRP Processing Run, during which DRP [schedules](#) no new [supply](#) suggestions for forecasted [demand](#), only for actual [demand](#).

You can override this when you submit a DRP run, with a blanket time fence that applies to all items in the run.

Leave this field blank to calculate the item-level time fences:

- For centrally supplied items from the item/stockroom lead time
- For locally purchased items from the lead time for the item/preferred supplier

## Safety Stock Weeks/Safety Stock Days

Enter the required [safety stock](#) cover, in weeks and days. This defaults from the company profile but you can vary it at item or DC level. DRP calculates [safety stock](#) from the forecast [demand](#) for the item.

You must enter sales [forecasts](#) for items if you want to create [safety stocks](#). You can override this when you submit a DRP run by a blanket value that applies to all items for that run.

## Centre

**Note:** This field is only displayed if the Source of [Supply](#) field is set to Central.

Enter a [centre](#) code (defined as a [centre](#) within at least one DRP [network](#)). Use this to include or exclude items when processing a particular [centre](#).

Alternatively, use the prompt facility to select from the Select DRP [Centre](#) pop-up.

## Central Stockroom

**Note:** This field is only displayed if the Source of [Supply](#) is set to Central.

Enter a stockroom code defined to the item within Inventory, and to a [centre](#) within DRP.

Alternatively, use the prompt facility to select from the Select Stockroom/Item pop-up.

You create [distribution order](#) lines for this item against this stockroom.

Press Enter to update. DRP records all updates in the DRP [Item Master](#) audit file. Then select **Exit (F3)** to leave the task.

## Style Selection Pop-up

To display this pop-up, select Create item records from the style in the Option field and then press Enter on the [Distribution Item](#) Master Selection window. The Colour and Size fields must be blank.

Use this pop-up to select the styles required.

### Fields

#### Boxes (Untitled)

Enter 1 in the boxes for the required styles.

Press Enter to proceed.

## Overwrite Available? Pop-up

To display this pop-up, press Enter on the Style Selection pop-up.

Use this pop-up to confirm that you want to overwrite existing item records with the style level information.

### **Fields**

#### **Item Records**

Use this checkbox as follows:

Checked - To overwrite existing item records with the style details

Unchecked - Not to overwrite existing records

Press Enter to validate your entries. The [Distribution Item](#) Master Selection window is displayed. Select **Update (F8)** to start a batch job to create the new records.

## Mass Create Item DC Records Window

To display this window, select Copy style and item stockroom records in the Option field and then press Enter on the [Distribution Item](#) Master Selection window. The Item and Based on fields must be blank.

You use this window to copy style or item level [distribution item](#) master records that already exist at one [centre](#) or DC to other [centres](#) or stockrooms.

### **Fields**

#### **Centre/DC and To Centre/DC**

Enter the [centre](#) or DC from and to which you want to copy the [Distribution Item](#) Master details. The details must already exist at the From [centre](#) or DC.

You can use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

#### **To Stockroom**

You can optionally enter a specific stockroom to which to copy the details.

Alternatively, use the prompt facility to select from the DRP Stockrooms pop-up.

#### **From Item**

Enter the style from which you want to copy details. You can enter a style code or you can transfer at item level.

Alternatively, use the prompt facility to select from the Select DRP Items for [Centre/DC](#) pop-up.

**Scope**

Use this field to define further the level at which details are transferred.

Select one of the following:

As input (0) (default) - To use the details as input

All styles (1) - To copy all SKU details that fall under the style code

All colours (2) - To copy all colours of a style or item

All sizes (3) - To copy all sizes of a style or item.

**Overwrite Available**

The overwrite function allows you to overwrite any existing [Distribution Item](#) Master records at the To stockroom or [centre](#).

Use this checkbox as follows:

Checked - To overwrite existing item records with the style details

Unchecked - Not to overwrite existing records

## **Options**

### **Amend from List**

Use this to amend the line.

### **Delete from List**

Use this to delete the line. Select **Confirm Delete (F11)** to confirm the deletion.

Press Enter to validate your entries and display the details of the records. When you have completed your entries, select **Update (F8)** to submit a batch job to transfer the [Distribution Item](#) Master records. Select **Exit (F3)** to leave the task.

## Planners [7/STDRM]

[Planners](#) are responsible for planning items or a range of items at each [centre](#) or DC.

You use this task to maintain details of all [planners](#) at each [centre](#) or DC. Each [planner](#) must be cross-referenced to a purchase officer within Purchase Management.

**Note:** You assign a [planner](#) code to all items for which the [planner](#) is responsible via the [Distribution Item](#) Master.

## DRP Planners Selection Window

To display this window, select the [Planners](#) task.

You use this window to select the [centre](#) or DC and the [planner](#) code you want to maintain.

### **Fields**

#### **Centre/DC**

Enter any [centre](#) or DC code which has periods defined.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

#### **Planner Code**

Enter an existing [planner](#) to maintain, or enter a new [planner](#) code.

Alternatively, use the prompt facility to select from the Select [Planner](#) pop-up.

**Note:** If you specify a [centre](#) or DC, this restricts the list of [planners](#) to this [centre](#) or DC. If you leave the field blank, all [planners](#) for the company are displayed.

Press Enter to display the DRP [Planners](#) Details window.

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## DRP Planners Details Window

To display this window, enter a [planner](#) code and then press Enter on the [DRP Planners Selection](#) window.

You use this window to maintain information relating to the [planner](#) and specify a purchase officer number to which to reference the [planner](#). Purchase Management requires the purchase officer number when purchase orders are created from [DRP suggestions](#) (for items controlled by the [planner](#)).

### **Fields**

#### **Name**

You must enter the name of the [planner](#).

#### **Department**

Enter the [planner's](#) department.

#### **Telephone**

Enter the [planner's](#) telephone or extension number.

#### **Purchase Officer No**

You must enter the Purchase Officer Number as defined in Purchase Management.

Alternatively, use the prompt facility to select from the [Select Planner](#) pop-up.

Select **Update (F8)** to update the details held in the [DRP Planners](#) file.

## Supplier Schedule Profile [9/STDRM]

Supplier [schedule](#) reports are of particular use to companies who have a close working relationship with their suppliers and want to keep them notified with details of future commitments, by providing forward [schedules](#). The suppliers can use these reports to buy in materials, manufacture and plan to meet the [schedule demand](#).

You use this to control the format and scope of supplier [schedules](#), at individual supplier, or supplier and minor item group level.

The supplier [schedule](#) profile is set up on the assumption that you will know what orders need to be placed immediately, but will become less sure of requirements for the more distant future.

## Supplier Schedule Period Maintenance Selection Window

To display this window, select the Supplier [Schedule](#) Profile task.

You use this window to specify the supplier and, if required, minor item group for which to maintain [schedule](#) formats.

### **Fields**

**Note:** To maintain [schedule](#) formats at supplier level, enter a Purchase Management supplier. To maintain [schedule](#) formats at supplier and item group level, enter a supplier and a minor item group.

#### **Supplier**

Enter a supplier defined within Purchase Management.

Alternatively, use the prompt facility to select from the Supplier Search pop-up.

#### **Minor Item Group**

You can optionally enter a minor item group defined in the Inventory Descriptions file. Building a [schedule](#) profile using minor item groups ensures that the supplier receives reports that are more detailed.

You can use the prompt facility to select from the PGMN Product Group - Minor pop-up.

To display the Supplier [Schedule](#) Period Maintenance Detail window, enter a supplier, and if required, a minor item group, and then press Enter.

## Supplier Schedule Period Maintenance Detail Window

To display this window, enter a supplier, and if required, a minor item group, and then press Enter on the Supplier [Schedule](#) Period Maintenance Selection window.

You use this window to define the supplier [schedule](#) report column headings, reporting intervals, and inclusion and exclusion rules.

### **Fields**

#### **Time Period**

The weekly and monthly reports are each split into two sections, representing shorter-term and longer-term scheduling. You define each section to consist of a number of weeks and periods. You can change the default column headings for each section by overtyping the defaults with your own headings.

#### **Weekly Report**

Specify how many weeks from the start date of the report to include in the fixed and firm sections of the weekly report. The maximum is 16 weeks.

#### **Period Report**

Specify how many periods from the start of the report to be included in the probable and tentative sections of the period report. The maximum is 15 periods.

The [schedules](#) are built this way because your advance order for a point in time might be tentative, becoming probable a few weeks later, then firm as time moves on and finally fixed when you are sure of [demand](#).

## Supply Records

### PO

You use this field to specify whether to include purchase orders in the short-term section of the weekly report.

Use this checkbox as follows:

Checked - To include purchase orders

Unchecked - To exclude purchase orders

### RQ

You use this field to specify whether to include requisitions created from DRP [supply](#) suggestions, in the short-term section of the weekly report.

Use this checkbox as follows:

Checked - To include requisitions

Unchecked - To exclude requisitions

### SG

You use this field to specify whether to include suggested purchase orders in the short-term section of the weekly report.

Use this checkbox as follows:

Checked - To include suggested purchase orders

Unchecked - To exclude suggested purchase orders

**Note:** *This does not include changes to suggested quantity or dates.*

Select **Update (F8)** to save the details and then select **Exit (F3)** to leave the task.



[Forecasts](#) are not essential within DRP but they can be very useful for forward planning. You can generate sales [forecasts](#) and stock level [forecasts](#).

You can also transfer sales [forecasts](#) into DRP from the Forecasting module; this avoids entering manual [forecasts](#) and takes into account the last three years' sales history.

You can generate [forecasts](#) for minor item groups and spread them down to item level using spread profiles.

You can maintain [forecasts](#) at period, weekly and daily level. You can spread [forecasts](#) from period to weekly to daily level by defining seasonal indices, invoking automatic spreading or direct entry and manipulation of [forecasts](#) and spread indices.

Use stock level [forecasts](#) to build stock up to a planned level according to specified target quantities and dates.

## Roll Down Profiles [1/STDRF]

Use this task to assign percentages to products within minor item groups to reflect their relative [demand](#), in either quantity or value. You can then spread the overall sales [forecasts](#), or stock level targets, according to these percentages.

DRP uses the minor item group codes specified for items in Inventory Management to identify product families. DRP treats all items with the same minor item group code as members of a family.

## Maintain Roll Down Profile Selection Window

To display this window, select the Roll Down Profiles task.

Use this window to select the [centre](#) or DC to maintain.

### Fields

#### **Enter Centre/DC**

Enter a [centre](#) or DC with periods and stockrooms defined.

Alternatively, use the prompt facility to select from the Select DRP [Centre](#)/DC pop-up.

**Group**

Enter an item minor group. This is mandatory when an item is entered.

Alternatively, use the prompt facility to select from the Select Minor Item Group pop-up.

**Item**

You can optionally enter an item if you wish to forecast at this level. You may enter a style only to forecast at colour level, or a style and colour to forecast by size.

You can use the prompt facility to select from the Select Style and Select Colour pop-ups.

Enter a [centre](#) or DC and press Enter to display the Maintain Group Profile List window. If a group is also entered, this window will be skipped and the Maintain Item Group Profile Details window will be displayed.

## Maintain Group Profile List Window

To display this window, enter a [centre](#) or DC and then press Enter on the Maintain Item Group Profile Selection window.

You use this window to select the minor item group to maintain.

This window displays a list of all minor item groups. If **1** is displayed alongside a group, it already has a profile defined but you can still maintain that profile.

DRP sources these groups from the Inventory Descriptions file.

**Note:** *When you select an item group, the item profiles are displayed on the next window. However, the selected item group must have at least one item defined to it (via Inventory Management Item Details).*

Select the item group required to display the Maintain Group Profile Details window.

## Maintain Group Profile Details Window

To display this window, select an item group on the Maintain Group Profile List window.

You use this window to assign a percentage quantity or value to each item in the selected minor item group.

**Fields****Seasonal Profile**

You can enter a seasonal profile code for the DC or [centre](#) and product group.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

This field will default to the last code entered.

## Percentage

Enter the projected percentage sale for each item within the item group. DRP interprets blank fields as zero sales. The total percentage for each item group must equal 100%.

**Note:** When you select **Delete (F11)**, DRP sets all the percentages to zero but does not delete the items themselves.

Select **Update (F8)** to update these percentages immediately in the DRP Group Profile file.

## Seasonal Profiles [2/STDRF]

Use this task to maintain seasonal profiles. You can use these profiles as a template to break down sales [forecasts](#) on a time-phased basis by period, week and day. This facility is not mandatory for forecast maintenance, but it is useful if you want to take into account seasonal fluctuations.

Similarly, you can use this task to define time-phased stock building and consumption planning profiles.

## Maintain Seasonal Profiles Window

To display this window, select the Seasonal Profiles task.

You use this window to create and maintain seasonal profiles.

### Fields

#### **Centre/DC**

Enter a [centre](#) or DC that has a [calendar](#), time-phased planning periods and stockrooms defined. Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

#### **Profile Code**

Enter the profile code.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

The profile code itself is not unique; you can use common seasonal profile codes across different years and different [centres](#) or DCs.

#### **Year**

Enter the year in YY format. You must set up the [centre](#) or DC and year combination using [Calendar](#) Maintenance. This defaults to the current year.

#### **Entry Level**

Select one of the following to specify how to build the seasonal profile:

Period (1) - On a period basis up to 13 periods, and on a weekly basis up to 53 weeks

**Note:** If you have unchecked Period [Forecasts](#) on the company profile, this option is not available.

Weekly (2) - For a weekly basis

### **Based on Profile**

You can create a new profile using an existing profile as a template. The [calendar](#) code, year and entry level for the Based On Profile must match those for the profile you create.

Press Enter to display the Maintain Seasonal Profiles Indices pop-up.

## Maintain Seasonal Profiles Indices Window

To display this window, enter the details and then press Enter on the Maintain Seasonal Profiles window.

Use this window to maintain the profile description and individual period, weekly and daily indices. The window displayed depends on the entries you made on the Maintain Seasonal Profile window.

**Note:** If you select an entry level of Period on the previous window, you do not need to enter the weekly indices.

### **Fields**

#### **Profile**

Enter a description for the profile.

#### **Daily Indices**

Daily indices are not mandatory but they can be useful for Forecast maintenance to take fluctuations within a normal working week into account.

Enter the daily indices. These values cannot be negative or greater than 999. DRP breaks weekly [forecasts](#) down, based on the daily indices relative to the sum of all daily indices for the week. Day 1 is Monday. If you do not enter daily figures, DRP spreads weekly [forecasts](#) uniformly based on the working days defined in the weekly templates for the [calendar](#).

**Caution:** If you enter daily indices, DRP disregards weekly templates.

#### **Period Indices**

Enter the period indices. These values cannot be negative or greater than 999. DRP breaks [forecasts](#) down by period, using the period index relative to the sum of index values for all periods.

#### **Weekly Indices**

If you selected an entry level of **Period** on the Maintain Seasonal Profile window, enter the weekly indices. These values cannot be negative or greater than 999. DRP breaks period [forecasts](#) down based on the weekly indices.

If you selected an entry level of **Weekly** on the Maintain Seasonal Profile window, enter the weekly indices: These values cannot be negative or greater than 999. DRP breaks annual [forecasts](#) down based on the weekly indices relative to the sum of all weekly indices for the year.

**Note:** When you select an item group, the item profiles are displayed on the next window. However, the selected item group must have at least one item defined to it (via Inventory Management Item Details).

### **Functions**

#### **Period (F16)**

Use this to maintain the period indices.

#### **Weekly (F17)**

Use this to maintain the weekly indices within a period.

#### **Distribution (F18)**

Use this to calculate the percentage spread for the entered indices.

Select **Update (F8)** to add the new profile, or update the existing one.

## Maintain Sales Group Forecasts [3/STDRF]

The Maintain Group [Forecasts](#) task generates a forecast for a minor item group. It will not include information on specific items. However, you can vary the time bands for which you generate [forecasts](#) and you can break [forecasts](#) right down to a daily level.

## Maintain Group Forecasts Selection Window

To display this window, select the Maintain Sales Group [Forecasts](#) task.

Use this window to enter the details of the forecast to generate.

### **Fields**

#### **Centre/DC**

Enter a [centre](#) or DC with defined time-phased planning periods and stockrooms and at least one valid minor item group profile defined.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

#### **Year**

Enter the year in YY format. The default is the current year. You can change to a subsequent year defined to the [calendar](#) for the selected DC or [centre](#).

**Item Group**

Enter a minor item group with a profile set up for the [centre](#) or DC.

Alternatively, use the prompt facility to select from the Select Minor Item Group pop-up.

**Forecast Basis**

Select one of the following:

Quantity (1) - To maintain [forecasts](#) by quantity

Value (2) - To maintain [forecasts](#) by value

**Note:** If you previously maintained the forecast using the other option, DRP displays a warning. Select **Update (F8)** to continue.

**Seasonal Profile**

Enter a seasonal profile which has a profile, year and [centre](#) or DC combination previously set up through the Seasonal Profile Maintenance function.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

The profile you select determines the levels you can maintain for the forecast. If you set up the seasonal profile with an entry level of **Weekly**, you can only maintain daily and weekly [forecasts](#).

To spread product group sales forecast quantities or values evenly across the forecast periods, weeks or days, or both, leave this field blank.

**Maintain Intervals**

Check this to access the Maintain Group [Forecasts](#) Intervals window. You use this to define time bands (intervals), over which DRP spreads an input quantity or value [forecasts](#).

Press Enter to display the Maintain Group [Forecasts](#) Interval window.

## Maintain Group Forecasts Interval Window

To display this window, enter the required details, check the Maintain Intervals field and then press Enter on the Maintain Group [Forecasts](#) Selection window.

You use this window to enter forecast quantities or values, by item group and [centre](#) or DC, and to define time intervals over which to spread this forecast.

If you select no profile, DRP assumes an equal distribution; otherwise, the indices associated with the selected seasonal profile control the distribution of the forecast.

The resulting forecast replaces any existing [forecasts](#) for the periods concerned.

**Fields**

## Control Details

### Daily Forecasts to Week

This field displays the number of the last week for which the automatic forecast spread function created daily [forecasts](#).

**Note:** This does not update when you spread [forecasts](#) interactively.

### Weekly Forecast to Week

This field displays the number of the last week for which the automatic forecast spread function created weekly [forecasts](#).

**Note:** This does not update when you spread [forecasts](#) interactively.

### Last Week of Forecast

This field displays the number of the last week of the forecast that has a non-zero quantity or value. If this is a period forecast, the last week is the end week of the period.

## Spread Details

### Forecast Quantity to Spread

Enter the forecast quantity or value to spread over the selected intervals. DRP breaks this down according to the seasonal profile previously selected. Leave this field blank to spread the forecast evenly across the intervals.

### Forecast Intervals

Enter the range for which you want to generate period, weekly or daily [forecasts](#) over the specified time bands (intervals). The intervals must not overlap and must be in correct date order, that is, the From date must not be after the To date. The From and To weeks should correspond to the period start and end weeks in the [calendar](#) structure.

## Functions

### Continue (F10)

Use this when updating the forecast quantity or ranges to apply the new values.

### Display Structure (F20)

**Note:** This is only displayed if you use a seasonal profile with Entry Level set to Period.

Use this to display the [calendar](#) structure.

Press Enter or select **Continue (F10)** to display the Maintain Group [Forecasts](#) Spread Forecast window.

## Maintain Group Forecasts Spread Forecast Window

To display this window, enter the forecast details and then press Enter on the Maintain Group [Forecasts](#) Interval window.

You use this window to:

- Maintain the total sales forecast quantity or value for the year
- Maintain the time-phased spread indices
- Maintain the forecast quantities or values
- Spread the total forecast

## **Fields**

### **Total Forecast Quantity**

The default value is the previously maintained total forecast quantity or value. Enter a new total forecast quantity. If you enter a different total forecast from DRP total, a warning message is displayed. You can override this by selecting **Update (F8)**.

### **Seasonal Profile**

Enter a different seasonal profile from the one chosen on the initial window. This is the profile used if you select a period to week, or week to day, forecast break down. You must have set up the Profile, Year and DC or [centre](#) combination using the Seasonal Profiles task. If this field is blank, DRP spreads the quantity or value evenly across the selected forecast periods.

### **Position to Period**

The default for the start of the period list is the current period. Enter a period number to re-position the list with that period displayed.

### **Total (Index and Quantity or Value)**

***Note:** These fields are output only.*

These fields are maintained by the software. To re-calculate these figures if you change the Index, Quantity or Value in the table, press Enter.

If DRP retrieves the indices from a seasonal profile code, the total is initially 100 and DRP expresses individual forecast period indices proportionally.

DRP reconciles the quantity with the total forecast quantity or value you have already entered.

## **Table**

### **Period/Start**

***Note:** These fields are output only.*

There are three forecast levels: period, weekly and daily.

Period records have a number in the format PP, where PP is the defined period number. The start date is the first Monday in the period.

Weekly records have a number in the format PPWW, where PP is the period number and WW is the week number. The start date is the Monday of the week.

Daily records display a weekly period number and the actual date as the Start Date.

## Index

Enter the period index value used to spread [forecasts](#). You can retrieve this from the seasonal profile. DRP uses this index to apportion the total forecast.

## Quantity

Enter a quantity or value for the respective period, week or day.

You can generate this by interactively breaking down period or weekly [forecasts](#) or by applying period indices to forecast quantities or values.

## Options

### Select to Spread

Select this to spread period or weekly [forecasts](#). If you spread a period forecast, the Maintain Item Group Forecast Weekly Spread window is displayed. If you spread a weekly or daily forecast, the Maintain Item Group Forecast Daily Spread window is displayed.

DRP breaks period forecast records down to weekly [forecasts](#) and weekly forecast records down to daily [forecasts](#). You cannot select daily records.

## Functions

### Barchart (F14)

Use this to display a bar chart showing the forecast quantity or value distribution by period throughout the forecast year.

### Apply Index (F17)

Use this to break down the total forecast quantity or value over the forecast periods, in proportion to the period indices, compared to the sum of all period index values.

### Update/Style Forecasts (F20)

Use this to update the item minor group [forecasts](#) and display the Maintain Group [Forecasts](#) Update Item window, which you can use to create and maintain multiple item sales [forecasts](#).

**Caution:** You should apply any indices you have amended, before updating with **Update (F8)** or **Update/Style Forecasts (F20)**.

Select **Update (F8)** to update the [forecasts](#) and indices for the selected DC or [centre](#), year and item group. If the DRP-maintained total forecast quantity or value is different from the entered forecast quantity, a warning displays. You can override this and then update the entered forecast quantity or value.

## Maintain Group Forecast Weekly Spread Pop-up

To display this pop-up, use Select to Spread for a period record on the Maintain Group [Forecasts](#) Spread Forecast window.

You use this pop-up to break down period [forecasts](#) into weekly [forecasts](#).

**Note:** To update the records, press Enter without altering any of the fields.

### **Fields**

#### **Period**

**Note:** This field is output only.

This field displays the period for which DRP breaks the [forecasts](#) down to weekly level.

#### **Total Quantity**

Enter the total quantity or value for the period. This field defaults from the previous window.

#### **Seasonal Profile**

Enter the seasonal profile used to break down the period forecast to weekly [forecasts](#). This field defaults from the previous window.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

Leave the profile blank to spread the forecast quantity or value evenly across the weekly forecast periods specified as working weeks on the [calendar](#).

#### **Table**

##### **Index**

Enter the weekly index. The default is from the seasonal profile. Leave the profile code blank on the previous window to spread the quantities evenly for all working weeks.

##### **Quantity or Value**

Enter the forecast quantity or value for each week. You can generate this by applying the weekly indices to the entered total quantity or value.

### **Options**

#### **Select to Spread**

Use this to select a weekly forecast to break down to daily [forecasts](#). Leave the seasonal profile blank to spread the forecast evenly using the working days on the [calendar](#) week template. The Maintain Group Forecast Daily Spread pop-up is displayed.

### **Functions**

#### **Apply Index (F17)**

Use this to spread the entered total quantity or value over the weeks in the period, in proportion to the weekly indices, compared to the sum of the weekly indices for the period.

Press Enter to apply any changes. If there are no changes, the Maintain Group Forecast Spread Forecast window is displayed.

## Maintain Group Forecast Daily Spread Pop-up

To display this pop-up, use **Select to Spread** on a weekly record on the **Maintain Group Forecast Weekly Spread** pop-up or on the **Maintain Group Forecast Spread Forecast** window.

You use this pop-up to break down weekly [forecasts](#) into daily [forecasts](#). Press **Enter** without altering any of the fields to update the records.

### Fields

#### **Week Total**

Enter the total quantity or value for the week and select **Apply Index (F17)** to adjust the forecast.

#### **Entered.... (Index Total and Quantity or Value Total)**

*Note: These fields are output only.*

To re-calculate the sum of all the daily indices, press **Enter**.

To re-calculate the sum of all daily forecast quantities or values, press **Enter**.

DRP checks this sum against the entered week total quantity or value field. If it is different, DRP issues a warning and you can select **Update (F8)** to override.

#### **Table**

##### **Index (Untitled)**

Enter the daily index values and select **Apply Index (F17)** to adjust the quantities. This defaults from the seasonal profile. If you leave the profile code blank, DRP sets the indices to **1** for each working day on the weekly template.

##### **Quantity (Untitled)**

Enter the forecast quantity or value for each day. To generate this automatically, apply the daily indices to the total quantity or values and then press **Enter**.

### Functions

#### **Apply Index (F17)**

Use this to spread the total quantity or value over the days, in proportion to the daily indices, compared to the sum of indices.

Press **Enter** to continue or select **Previous (F12)** to return without update.

## Maintain Group Forecasts Barchart Window

To display this window, select **Barchart (F14)** on the **Maintain Group [Forecasts](#) Spread Forecast** window.

This window displays a bar chart of the forecast quantity or value distribution throughout the forecast year, by week.

### **Period Forecasts**

DRP divides these by the number of weeks within the period. For example, a period forecast of 200 units for a 4-week period displays as 50 units per week.

### **Daily Forecasts**

DRP accumulates these throughout the week and displays the resulting weekly total.

DRP calculates the Y-axis from the maximum forecast quantity or value in the year, so that it all fits on window. You can change this by entering a maximum figure in the Alter Scale field. If this field is blank, the display reverts to the default.

### **Fields**

#### **Alter Scale**

Enter a new value to display a different scale.

*Note: Use Page Up and Page Down to display further weeks.*

Select **Previous (F12)** to leave the window.

## Maintain Group Forecasts Item Update Pop-up

To display this pop-up, select **Update Item Forecasts (F20)** on the Maintain Group Forecast Spread Forecast window.

Use this pop-up to select one or more items to apply the group [forecasts](#) and access the Item Sales Forecast Maintenance functions (see the Maintain Sales Product [Forecasts](#) task).

### **Fields**

#### **Position To**

Use this to position the display at the entered value.

### **Options**

#### **Select**

Use this to select the item and access the Item Sales Forecast Maintenance functions (see the Maintain Sales Product [Forecasts](#) task).

Press Enter to continue.

## Roll Down Sales Product Forecasts [4/STDRF]

Use this task to break item group [forecasts](#) down into item [forecasts](#), in proportion to the percentages defined for the items within the item group profiles.

This forecast regenerates all item [forecasts](#) for items within the selected item groups.

---

## Rolldown Forecasts Selection Window

To display this window, select the Roll Down Sales Product [Forecasts](#) task.

You use this window to select the [centre](#) or DC, year and range of item groups for which to generate item level [forecasts](#).

### **Fields**

#### **Centre/DC**

Enter a [centre](#) or DC with periods and stockrooms defined and at least one item group profile defined.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

#### **Year**

Enter the year, in YY format, for which you want to generate [forecasts](#).

#### **Item Group/To**

Enter the minor item group range.

Alternatively, use the prompt facility to select from the Select Minor Item Group pop-up.

#### **Style Code/To**

Enter style codes to designate the range of styles to have their [forecasts](#) rolled down.

Alternatively, use the prompt facility to select from the Select Style pop-up.

#### **Starting Level**

Select one of the following codes to represent the level at which you want to commence the roll down:

Group Level (1)

Style Level (2)

Style/Colour Level (3)

#### **Down to Level**

Select one of the following codes to represent the level to which you want to roll down:

Style Level (2)

Style/Colour level (3)

Style/Colour/Size level (4)

Press Enter to display the Roll Down [Forecasts](#) Confirmation window.

## Rolldown Forecasts Confirmation Window

To display this window, press Enter on the Rolldown [Forecasts](#) Selection window.

You use this window to confirm the selection to be used to generate item-level sales [forecasts](#). DRP re-calculates all [forecasts](#) for the selected items.

**Note:** You can maintain the item forecast using the Maintain Sales Product [Forecasts](#) task.

Select **Submit Job (F8)** to submit the batch job.

## Maintain Sales Product Forecasts [5/STDRF]

Use this task to create and maintain item-level sales [forecasts](#). You can generate these [forecasts](#) by:

- Profiling item group forecasts, using facilities within the DRP module
- Transferring forecasts directly from the Forecasting module using facilities within that module
- Direct entry through this task without prior set-up of Item Group Profiles

## Maintain Item Sales Forecast Selection Window

To display this window, select the Maintain Sales Product [Forecasts](#) task.

You use this window to select the item for which you want to create or maintain sales [forecasts](#).

### **Fields**

#### **Centre/DC**

Enter a [centre](#) or DC with periods and stockrooms defined.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

#### **Year**

Enter the year, in YY format, for which the forecast is being created. You can change to a subsequent year defined to the [calendar](#) for the DC or [centre](#).

#### **Item**

Enter an item defined to the [centre](#) or DC.

Alternatively, use the prompt facility to select from the Select Style, Select Colour and Select Size pop-ups.

#### **Forecast Basis**

Select one of the following:

Quantity (1) - To forecast by quantity

Value (2) - To forecast by value

**Note:** If you previously maintained the forecast using the other option, DRP displays a warning. Select **Update (F8)** to continue.

### Seasonal Profile

Enter a seasonal profile. The profile, year and DC or [centre](#) combination must already exist.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

The seasonal profile selected on the initial window determines the level at which you can maintain [forecasts](#). If you set it up using Entry level **Weekly (2)**, you cannot maintain period [forecasts](#). If you enter no profile, DRP spreads item level quantity or value [forecasts](#) across the forecast periods.

### Maintain Intervals

Check this to access the Maintain Item Sales Forecast Interval Selection window. You use this to define the time bands (intervals) over which to spread the quantity or value [forecasts](#). The default is **unchecked**.

Press Enter to continue.

## Maintain Item Sales Forecast Interval Selection Window

To display this window, check the Maintain Intervals field and then press Enter on the Maintain Item Sales Forecast Selection window.

You use this window to enter forecast quantities, or values, by item and [centre](#) or DC and define time intervals over which to spread this forecast automatically, using a selected seasonal profile. The resulting forecast replaces any existing [forecasts](#) for the time bands involved. You can display the [calendar](#) structure for the DC to help when specifying the time bands (intervals).

## **Fields**

### **Control Details**

#### **Daily Forecast to Week**

This field displays the number of the last week containing daily [forecasts](#) generated using the Spread Item Forecast task.

**Note:** *This does not update if you maintain [forecasts](#) interactively.*

#### **Weekly Forecast to Week**

This field displays the number of the last week containing weekly [forecasts](#) generated using the Spread Item Forecast task.

**Note:** *This does not update if you maintain [forecasts](#) interactively.*

#### **Last Week of Forecast**

This field displays the number of the last week of the forecast generated using the Spread Item Forecast task, which has a non-zero quantity or value. If this is a period forecast, the last week is the end week of the period.

**Note:** *If you maintain a particular item forecast interactively, the control details displayed may not represent the current status of the forecast. You should examine interactively maintained forecast details before using this task.*

## **Spread Details**

### **Forecast Quantity to Spread**

Enter the sales forecast quantity, or value, to be spread over the selected interval (time band). DRP breaks this figure down according to the seasonal profile selected on the initial window. If you leave the profile code blank, DRP spreads the figure evenly across the intervals.

### **Forecast Intervals**

Enter a range over which to generate the period, weekly or daily [forecasts](#), or both, for the specified intervals. These intervals must not overlap, must be in correct date order, that is, the From date must be before the To date, and for calculation purposes must conform to period boundaries, that is, the period start and end weeks defined on the DC or [centre](#) and year [calendar](#).

If [forecasts](#) already exist for periods covered by the intervals selected, a warning is displayed but you can select **Continue (F10)** to proceed. This overwrites the existing [forecasts](#).

## **Functions**

### **Continue (F10)**

Use this when updating the forecast quantity or ranges to apply the new values.

### **Display Structure (F20)**

**Note:** *This is only displayed if you use a seasonal profile with Entry Level set to Period.*

Use this to display the [calendar](#) structure.

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Press Enter or select **Continue (F10)** to display the Maintain Item Sales Forecast Spread Forecast window.

## Maintain Item Sales Forecast Spread Forecast Window

To display this window, press Enter on the Maintain Item Sales Forecast Interval Selection window.

Use this window to maintain the total and period forecast quantities or values and seasonal indices. You can break down the [forecasts](#) to daily, period and weekly [forecasts](#).

### Fields

#### **% of Group**

**Note:** *This field is output only.*

This field displays the percentage sales requirement for this item, within the item group profile. This does not display if you created the sales build using this function and did not include the item in the item group profile.

#### **Total Forecast Quantity/Value**

Enter the total forecast value. Use **Display Values (F18)** to switch the display between quantity and values. You cannot maintain the alternative display.

#### **Seasonal Profile**

Enter a seasonal profile. The default is the profile entered on the first window.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

This is the profile used if you select a period to week, or week to day, forecast break down. Leave this field blank to spread the forecast quantity or values evenly across the selected forecast periods.

#### **Position to Period**

The default for the start of the period list is the current period. Enter a period number to re-position the list with that period displayed.

#### **Total (Index and Quantity or Value)**

**Note:** *These fields are output only.*

Press Enter to re-calculate the sum of the indices for all forecast periods.

Press Enter to calculate the sum of the forecast quantities or values.

DRP checks this against the entered total quantity or value. If it is different, a warning is displayed. You can override this by selecting **Update (F8)** to update the entered total quantity or value.

**Table****Period/Start**

**Note:** *These fields are output only.*

Period records have a number in the format PP, where PP is the period number defined in the DC or [centre calendar](#) for the year. The start date is the first Monday in the period.

Weekly records have a number in the format PPWW, where PP is the period number and WW is the week number within the year defined in the [calendar](#). The start date is the Monday of the week.

Daily records have a weekly number and the actual date as the start date.

**Index**

Enter the period index. DRP uses this to calculate the individual forecast period quantities or values from the entered total quantity or value.

**Quantity or Value**

Enter the period quantity or value. You can generate this figure either by automatically spreading the total forecast down to period, weekly or daily level, using the Spread Item Forecast task, or by spreading the [forecasts](#) down in stages by applying seasonal indices or directly entering values or quantities.

**Options****Select to Spread**

Use this to select either a period forecast to break down to weekly [forecasts](#) or a weekly forecast to break down to daily [forecasts](#). You cannot select a daily record.

**Functions****Barchart (F14)**

Use this to display a bar chart showing the forecast quantity or value distribution throughout the forecast year.

**Apply Index (F17)**

Use this to spread the total forecast quantity or value over the forecast periods, according to the indices in each period, relative to the sum of the period indices.

**Caution:** You should apply indices before updating forecasts using **Update (F8)**.

**Display Values/Display Quantities (F18)**

Use this to alternate between the quantity and value displays. You cannot maintain the alternative view.

Use Select to Spread on a period forecast to display the Maintain Item Sales Forecast Weekly Spread pop-up.

---

## Maintain Item Sales Forecast Weekly Spread Pop-up

To display this pop-up, use Select to Spread on a period record on the Maintain Item Sales Forecast Spread Forecast window.

You use this pop-up to break down period [forecasts](#) into weekly [forecasts](#).

### Fields

#### **Total Quantity**

Enter the total quantity or value for the period. The value defaults from the previous window.

#### **Seasonal Profile**

Enter the seasonal profile used to break down the period forecast to weekly [forecasts](#). This defaults from previous window.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

Leave the profile blank to spread the forecast quantity or value evenly across the weeks.

#### **Table**

#### **Index**

Enter the weekly index. The value defaults from the seasonal profile. If the profile code is blank, DRP spreads the quantities evenly.

#### **Quantity or Value**

Enter the forecast quantity or value for each week. You can generate this figure by applying the weekly indices to the entered total quantity or value.

To display the previous window showing the weekly details, press Enter without entering any information.

### Options

#### **Select to Spread**

Use this to select a weekly forecast to break down to daily [forecasts](#). If the Seasonal Profile field is blank, the forecast spreads evenly across the working days defined on the [calendar](#) week template.

### Functions

#### **Apply Index (F17)**

Use this to spread the total forecast quantity or value over the weeks in the period, based on the weekly indices compared to the sum of the weekly indices for period.

Use Select to Spread to display the Maintain Item Sales Forecast Daily Spread pop-up.

## Maintain Item Sales Forecast Daily Spread Pop-up

To display this pop-up, use **Select to Spread** on a weekly forecast on the **Maintain Item Sales Forecast Weekly Spread** pop-up.

Alternatively, enter a quantity or value and use **Select to Spread** on the **Maintain Item Sales Forecast Spread Forecast** window.

You use this pop-up to break down weekly [forecasts](#) down into daily [forecasts](#).

### **Fields**

#### **Entered... (Total index and total value or quantity)**

Enter the total quantity or value for the week. The value defaults from the previous window.

To re-calculate the index total, press **Enter**.

To re-calculate the sum of all daily forecast quantities or values, press **Enter**. If the value is different to the entered total, a warning is displayed. You can select **Update (F8)** to override this and update the entered total quantity or value.

#### **Table**

##### **Index (Untitled)**

Enter the index. The default is from the seasonal profile. If the profile code is blank, **DRP** sets the indices to **1** for each working day, based on the [calendar](#) weekly template.

##### **Quantity or Value (Untitled)**

Enter the forecast quantity or value for each day. You can generate this by applying the daily indices to the total quantity or value.

### **Functions**

#### **Apply Index (F17)**

Use this to spread the total quantity or value over the days in the week, based on the daily indices compared to the sum of daily indices for the week.

Press **Enter** to re-display the previous window showing forecast details.

## Maintain Item Sales Forecast Bar Chart Window

To display this window, select **Barchart (F14)** on the **Maintain Item Sales Forecast Spread Forecast** window.

This window displays a graph of the item forecast quantity distribution throughout the forecast year, by week.

### **Period Forecasts**

**DRP** divides these by the number of weeks within the period. For example, a period forecast of 200 units for a 4-week period displays as 50 units per week.

## Daily Forecasts

DRP accumulates daily [forecasts](#) over a week and the resulting weekly total is displayed.

DRP calculates the Y-axis default from the maximum forecast quantity or value during the year. To re-set the maximum value, enter a figure in the Alter Scale field. If this field is blank, the display reverts to the original default.

### Fields

#### Alter Scale

To change the forecast quantity axis scale, enter a new maximum forecast quantity in this field.

**Note:** Use Page Up and Page Down to display more weeks.

Select **Previous (F12)** to re-display the Maintain Item Sales Forecast Spread Forecast window.

## Spread Sales Item Forecasts [6/STDRF]

Use this task to spread sales [forecasts](#) quickly down to period, weekly and daily levels by batch processing. This avoids having to spread [forecasts](#) individually in the Maintain Item Forecast task.

The seasonal profile set up on the DRP [Item Master](#) file records appears as the default profile on the Spread Item Sales Forecast Selection window. You can use this to change to an alternative profile or leave it blank, in which case DRP evenly spreads the [forecasts](#) across the intervals.

**Note:** DRP does not update any forecast with planning intervals that are inconsistent with the interval parameters and includes the forecast in an exception report.

## Spread Item Sales Forecast Selection Window

To display this window, select the Spread Sales Item [Forecasts](#) task.

You use this window to enter the selection criteria for the Spread Item Sales Forecast.

### Fields

#### Centre/DC

Enter a [centre](#) or DC with periods and stockrooms defined.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

#### Year

Enter the year, in YY format. You must have set up the year and [centre](#) or DC combination already.

#### Item Group

Enter a minor item group.

Alternatively, use the prompt facility to select from the Select Minor Group pop-up.

If you leave the field blank, all item groups with existing item [forecasts](#) are displayed.

### **From Item/To Item**

Enter the required item range.

Alternatively, use the prompt facility to select from the Select Style pop-up.

**Note:** *If you leave both the From and To fields blank, all existing item [forecasts](#) within the item group are displayed.*

### **Forecast Basis**

Select one of the following:

Quantity (1) - To maintain quantity [forecasts](#)

Value (2) - To maintain value [forecasts](#)

**Note:** *If you previously maintained the forecast using the other option, DRP displays a warning. Select **Update (F8)** to continue.*

Press Enter to display the Spread Item Sales Forecast Detail window.

## Spread Item Sales Forecast Detail Window

To display this window, enter the selection details and then press Enter on the Spread Item Sales Forecast Selection window.

Use this window to select one or more items for spreading over the specified intervals (time bands). These intervals must be in correct date order, that is the From date must be before the To date, and you must enter at least one set.

### **Fields**

#### **Table**

#### **Select (Untitled)**

Choose Select to select an item forecast for profiling over the selected intervals.

#### **Seasonal PRF.**

Enter a seasonal profile if required.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

#### **Other Fields**

#### **Daily Forecasts From Week/To Week**

Enter a range of weeks for which to generate a daily forecast.

#### **Weekly Forecasts From Week/To Week**

Enter a range of weeks for which to generate a weekly forecast.

---

## **Functions**

### **Select All (F15)**

Use this to select all items. You can then de-select items for which you do not want a forecast by setting the Select field to **blank**.

### **Display Values/Display Quantities (F18)**

Use this to change the display between value and quantity.

Select **Submit Job (F8)** to submit the job.

## Maintain Stock Group Forecasts [7/STDRF]

You can use this task to maintain stock level targets interactively at item group and [centre](#) or DC level. You can build stocks, in excess of [safety stocks](#), to meet periods of [demand](#) when the [supply](#) rate is unable to satisfy that [demand](#).

You can express requirements in terms of quantity or value and you can specify dates during which and by which you must build and consume the target.

## Maintain Item Group Stock Forecasts Selection Window

To display this window, select the Maintain Stock Group [Forecasts](#) task.

You use this window to select which stock level targets to maintain and on what basis, by [centre](#) or DC, year and item group.

### **Fields**

#### **Centre/DC**

Enter a [centre](#) or DC with defined time-phased planning periods and stockrooms and at least one valid minor item group profile defined.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

#### **Year**

Enter the year in YY format. This field defaults to the current year. You can change to a subsequent year defined to the [calendar](#) for the selected DC or [centre](#).

#### **Item Group**

Enter a minor item group with a profile set up for the [centre](#) or DC.

Alternatively, use the prompt facility to select from the Select Minor Item Group pop-up.

#### **Forecast Basis**

Select one of the following:

Quantity (1) - To maintain [forecasts](#) by quantity

Value (2) - To maintain [forecasts](#) by value

**Note:** If you previously maintained the forecast using the other option, DRP displays a warning. Select **Update (F8)** to continue.

### **Seasonal Profile**

Enter a seasonal profile which has a profile, year and [centre](#) or DC combination previously set up through the Seasonal Profile Maintenance function.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

The profile you select determines the levels you can maintain for the forecast. If you set up the seasonal profile with an entry level of **Weekly**, you can only maintain daily and weekly [forecasts](#).

To spread product group sales forecast quantities or values evenly across the forecast periods, weeks or days, or both, leave this field blank.

### **Maintain Intervals**

Check this to access the Maintain Item Group Stock [Forecasts](#) Intervals Selection window. You use this to define time bands (intervals), over which DRP spreads an input quantity or value [forecasts](#).

Press Enter to display the Maintain Group [Forecasts](#) Interval window.

## Maintain Item Group Stock Forecasts Intervals Selection Window

To display this window, check the Maintain Intervals field and then press Enter on the Maintain Item Group Stock [Forecasts](#) Selection window.

You use this window to maintain stock level targets and define the time bands over which you build and consume the targets, or both.

The indices, associated with the selected seasonal profile, control the build and consumption of the stock levels. If you do not select a profile, DRP applies the stock target to the first period selected and reduces it, on a straight-line basis, to zero by the end period.

You can display the [calendar](#) structure for the DC/[centre](#) and year to assist in specifying time bands.

### **Fields**

#### **Control Details**

##### **Daily Forecasts to Week**

This field displays the last week for which daily stock build requirements have been created by the automatic forecast spread function.

**Note:** Interactive stock level maintenance does not update this.

**Weekly Forecast to Week**

This field displays the last week for which weekly stock build requirements have been created by the automatic forecast spread function.

**Note:** *Interactive stock level maintenance does not update this.*

**Last Week of Forecast**

This field displays the last week of the stock building plan which has a non-zero quantity or value. If this is a period plan, the last week is the end week of the period.

**Spread Details****Stock Target over Intervals**

Enter the maximum stock level target for the selected intervals. DRP assigns this according to the selected seasonal profile, in proportion to the maximum period index. If you do not select a seasonal profile, DRP sets the period indices to 100.

**Forecast Intervals**

Enter the intervals for the period, weekly or daily stock level targets. These intervals must not overlap and must be in correct date order, that is the From date must be before the To date. The start and end weeks must be period start and end weeks defined in the DC or [centre](#) and year [calendars](#).

If [forecasts](#) already exist for periods within the selected intervals, a warning is displayed.

**Functions****Continue (F10)**

Use this when updating the forecast quantity or ranges to apply the new values.

**Display Structure (F20)**

**Note:** *This is only displayed if you use a seasonal profile with Entry Level set to Period.*

Use this to display the [calendar](#) structure.

Press Enter or select **Continue (F10)** to display the Maintain Item Group Stock [Forecasts](#) Period Stock Levels window.

## Maintain Item Group Stock Forecasts Period Stock Levels Window

To display this window, enter details and then press Enter or select **Continue (F10)** on the Maintain Item Group Stock [Forecasts](#) Intervals Selection window or leave the Maintain Intervals field unchecked on the Maintain Item Group Stock [Forecasts](#) Selection window.

Use this window to maintain a stock level target, the time-phased spread indices and the stock level target quantities or values, for periods, weeks and days.

**Fields**

**Stock Target Quantity**

Enter the new target. This field defaults to the previously entered stock level target.

**Seasonal Profile**

Enter a different seasonal profile to profile stock levels.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

If this field is blank, DRP assigns the target to the initial period and reduces it, on a straight-line basis, to zero at the last period.

**Position to Period**

The default for the start of the period list is the current period. Enter a period number to reposition the list with that period displayed.

**Table****Period/Start**

*Note: These fields are output only.*

Numbers in format PP are period records, where PP is the period number defined in DC or [centre calendar](#). The start date is the first Monday in the period.

Weekly records have a number in the format PPWW where PP is the period number and WW is the week number within the year defined in the [calendar](#). The start date is the Monday of the week.

Daily records show the weekly number and the actual date as start date.

**Index**

Enter the period index value used to maintain period stock level targets. The default is from the database or from the seasonal profile. If you change the seasonal profile, DRP sets the maximum index to 100 and adjusts other period indices proportionally.

**Quantity/Value**

Enter a period quantity or value. DRP checks the period quantity or value against the maximum stock level target. If period [forecasts](#) exceed the maximum target, a warning displays.

You can also apportion the value by applying period indices to maximum stock-level target quantities or values, or adjust the value by profiling period targets down to week targets and weeks down to days.

If applying seasonal indices, DRP calculates the period stock level from the maximum stock level target, based on the ratio of the period index to the maximum period index. If you do not select a seasonal profile, DRP sets the period indices to 100.

**Options****Select to Spread**

Use this to select a stock level target. Select a period target to spread to weekly level. Select a weekly target to spread to daily level. You cannot select a daily target.

## Functions

### **Barchart (F14)**

Use this to display a bar chart that displays the stock build quantity, or value distribution, by period, throughout the forecast year.

### **Apply Index (F17)**

Use this to profile the total stock over the forecasting periods, in proportion to the period indices relative to maximum period index.

### **Update/Style Forecasts (F20)**

Use this to update the item minor group stock targets and display a window showing all items within the family, so you can create and maintain item stock level targets.

### **Stock Profile (F22)**

Use this to maintain target, or maximum, stock levels and dates by which to build and consume stocks.

Select **Create (F8)** to create a new forecast or **Update (F8)** to modify an existing forecast.

Use Select to Spread on a period or weekly forecast to display the Maintain Item Group Stock [Forecasts](#) Weekly/Daily Stock Levels pop-up.

**Caution:** Make sure you apply indices before you select **Create/Update (F8)** or **Update/Style Forecasts (F20)**.

## Maintain Item Group Stock Forecasts Weekly Stock Levels Pop-up

To display this pop-up, use Select to Spread on a period record on the Maintain Item Group Stock [Forecasts](#) Period Stock Levels window.

You use this pop-up to break down period stock level targets to weekly level.

**Note:** To update the records, press *Enter* without altering any of the fields.

### Fields

#### **Period**

**Note:** This field is output only.

This field displays the period for which DRP breaks the [forecasts](#) down to weekly level.

#### **Total Quantity**

Enter the total quantity or value for the period. This defaults from the previous window.

#### **Seasonal Profile**

Enter the seasonal profile used to break down the period forecast to weekly [forecasts](#). This defaults from the previous window.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

Leave the profile blank to spread the forecast quantity or value evenly across the weekly forecast periods specified as working weeks on the [calendar](#).

### **Table**

#### **Index**

Enter the weekly index. The default is from the seasonal profile. Leave the profile code blank on the previous window to spread the quantities evenly for all working weeks.

#### **Quantity or Value**

Enter the forecast quantity or value for each week. You can generate this by applying the weekly indices to the entered total quantity or value.

### **Options**

#### **Select to Spread**

Use this to select a weekly forecast to break down to daily [forecasts](#). Leave the seasonal profile blank to spread the forecast evenly using the working days on the [calendar](#) week template. This displays the Maintain Item Group Stock [Forecasts](#) Daily Stock Levels pop-up.

### **Functions**

#### **Apply Index (F17)**

Use this to spread the entered total quantity or value over the weeks in the period, in proportion to the weekly indices, compared to the sum of the weekly indices for the period.

Press Enter to apply any changes. If there are no changes, the Maintain Item Group Stock [Forecasts](#) Period Stock Levels window is displayed.

## Maintain Item Group Stock Forecasts Daily Stock Levels Window

To display this pop-up, use Select to Spread on a weekly record on the Maintain Item Group Stock [Forecasts](#) Weekly Stock Levels pop-up or on the Maintain Item Group Stock [Forecasts](#) Stock Levels window.

You use this pop-up to break down weekly [forecasts](#) into daily [forecasts](#). Press Enter without altering any of the fields to update the records.

### **Fields**

#### **Week Total**

Enter the total quantity or value for the week and select **Apply Index (F17)** to adjust the forecast.

#### **Entered.... (Index Total and Quantity or Value Total)**

**Note:** *These fields are output only.*

To re-calculate the sum of all the daily indices, press Enter.

To re-calculate the sum of all daily forecast quantities or values, press Enter.

DRP checks this sum against the entered Week total quantity or value field. If it is different, DRP issues a warning. You can select **Update (F8)** to override this.

### **Table**

### **Index**

Enter the daily index values and select **Apply Index (F17)** to adjust the quantities. This defaults from the seasonal profile. If you leave the profile code blank, DRP sets the indices to **1** for each working day on the weekly template.

### **Quantity**

Enter the forecast quantity or value for each day. To generate this automatically, apply the daily indices to the total quantity or values and then press Enter.

## **Functions**

### **Apply Index (F17)**

Use this to spread the total quantity or value over the days, in proportion to the daily indices, compared to the sum of indices.

Press Enter to continue or select **Previous (F12)** to return without update.

## **Maintain Item Group Stock Forecasts Barchart Window**

To display this window, select **Barchart (F14)** on the Maintain Item Group Stock [Forecasts](#) Period Stock Levels window.

This window displays a bar chart of the forecast quantity or value distribution throughout the forecast year, by week.

### **Period Forecasts**

DRP divides these by the number of weeks within the period. For example, a period forecast of 200 units for a 4-week period displays as 50 units per week.

### **Daily Forecasts**

DRP accumulates these throughout the week and displays the resulting weekly total.

DRP calculates the Y-axis from the maximum forecast quantity or value in the year, so that it all fits on window. You can change this by entering a maximum figure in the Alter Scale field. If this field is blank, the display reverts to the default.

## **Fields**

### **Alter Scale**

Enter a new value to display a different scale

**Note:** Use *Page Up* and *Page Down* to display further weeks.

Select **Previous (F12)** to leave the window.

## Maintain Item Group Stock Forecasts Create/Item Forecasts Pop-up

To display this pop-up, select **Update/Style Forecasts (F20)** on the Maintain Item Group Stock [Forecasts](#) Period Stock Levels window.

This pop-up displays all the items within the product item group and the percentage splits for items within the item group profiles. You can select one or more items sequentially, to apply the updated time-phased stock level targets at item level.

### **Fields**

#### **Position To**

Use this to position the display at the entered value.

### **Options**

#### **Select**

Use this to select the item and access the Stock Forecast Maintenance functions (see the Maintain Stock Product [Forecasts](#) task).

Press Enter to continue.

## Maintain Item Group Stock Forecasts Stock Profile Pop-up

To display this pop-up, select **Stock Profile (F22)** on the Maintain Item Group Stock [Forecasts](#) Period Stock Levels window.

Use this pop-up to define stock building targets so DRP can automatically create a time-phased stock level plan.

### **Fields**

#### **From Date/To Date**

Enter the date on which to start the stock build and the date by which the stock should be back to the [safety stock](#) level.

#### **Target Date**

Enter the date by which to build the target or maximum quantity. This must be inside the To and From date range.

#### **Target Quantity or Value**

Enter a target or maximum quantity to build by the specified date. This should be a quantity above the [safety stock](#) level.

**Example:**

You must build stocks from 10/10/06, to a maximum stock position of 100,000 units by 03/12/06. You must consume this stock by 18/01/07.

The date range is 10/10/06 to 18/01/06.

The target quantity is 100,000 units.

The target date is 03/12/06.

DRP generates time-phased stock level targets, building from the [safety stock](#) level, on a straight-line basis from 10/10/06 to a peak of 100,000 on 03/12/06. DRP reduces the stock back down to [safety stock](#), on a straight-line basis, by 18/01/07 (assuming there is sufficient [demand](#) to consume it).

Press Enter to generate the stock level indices and targets within the date range.

## Roll Down Stock Product Forecasts [8/STDRF]

You use this task to profile item group stock-level targets to item stock-level targets, in proportion to the percentages defined for the items within the item group profile.

This task regenerates all item stock targets for the items in the selected item groups.

### Roll Down Forecasts Selection Window

To display this window, select the Roll Down Stock Product [Forecasts](#) task.

You use this window to select your criteria for generating stock level targets.

#### **Fields**

##### **Centre/DC**

Enter a [centre](#) or DC with periods and stockrooms defined and at least one item group profile defined.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

##### **Year**

Enter the year, in YY format, for which you want to generate [forecasts](#).

##### **Item Group/To**

Enter the minor item group range.

Alternatively, use the prompt facility to select from the Select Minor Item Group pop-up.

##### **Style Code/To**

Enter style codes to designate the range of styles to have their [forecasts](#) rolled down.

Alternatively, use the prompt facility to select from the Select Style pop-up.

##### **Starting Level**

Select one of the following codes to represent the level at which you want to commence the roll down:

Group Level (1)

Style Level (2)

Style/Colour Level (3)

##### **Down to Level**

Select one of the following codes to represent the level to which you want to roll down:

Style Level (2)

Style/Colour level (3)

Style/Colour/Size level (4)

---

Press Enter to display the Roll Down Forecasts Confirmation window.

## Roll Down Forecasts Confirmation Window

To display this window, press Enter on the Roll Down [Forecasts](#) Selection window.

You use this window to confirm the selection to be used to generate item-level sales [forecasts](#). DRP re-calculates all [forecasts](#) for the selected items.

**Note:** You can maintain the item forecast using the Maintain Stock Product [Forecasts](#) task.

Select **Submit Job (F8)** to submit the batch job.

## Maintain Stock Product Forecasts [9/STDRF]

You use this task to create and maintain, by item and DC or [centre](#), stock level targets. DRP generates these targets by:

- Profiling item group stock level targets using previously described tasks within DRP
- Direct entry through this task without prior set up of Item Group Profiles

## Maintain Item Stock Forecast Selection Window

To display this window, select the Maintain Stock Product [Forecasts](#) task.

You use this window to select the item for which you want to create or maintain stock level targets.

### **Fields**

#### **Centre/DC**

Enter a [centre](#) or DC with periods and stockrooms defined.

Alternatively, use the prompt facility to select from the Select DRP [Centre](#)/DC pop-up.

#### **Year**

Enter the year, in YY format, for which the forecast is being created. You can change to a subsequent year defined to the [calendar](#) for the DC or [centre](#).

#### **Item**

Enter an item defined to the [centre](#) or DC.

Alternatively, use the prompt facility to select from the Select Style, Select Colour and Select Size pop-ups.

**Forecast Basis**

Select one of the following:

Quantity (1) - To forecast by quantity

Value (2) - To forecast by value

**Note:** If you previously maintained the forecast using the other option, DRP displays a warning. Select **Update (F8)** to continue.

**Seasonal Profile**

Enter a seasonal profile. The profile, year and DC or [centre](#) combination must already exist.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

The seasonal profile selected on the initial window determines the level at which you can maintain [forecasts](#). If you set it up using Entry level **Weekly (2)**, you cannot maintain period [forecasts](#). If you enter no profile, DRP spreads item level quantity or value [forecasts](#) across the forecast periods.

**Maintain Intervals**

Check this to access the Maintain Item Sales Forecast Interval Selection window. You use this to define the time bands (intervals) over which to spread the quantity or value [forecasts](#). The default is **unchecked**.

Press Enter to continue.

## Maintain Item Stock Forecast Intervals Selection Window

To display this window, complete the fields and then press Enter on the Maintain Item Stock [Forecasts](#) Selection window.

You use this window to maintain stock level targets by item and [centre](#) or DC, and define the time bands (intervals) to build or consume them, or both. The indices associated with the selected seasonal profile control the build and consumption of the stock levels. You can display the [calendar](#) structure for the DC and year to assist in specifying time bands.

**Fields****Control Details****Daily Forecasts to Week**

This field displays the number of the last week for which the automatic forecast spread function created daily [forecasts](#).

**Note:** This does not update when you spread [forecasts](#) interactively.

**Weekly Forecast to Week**

This field displays the number of the last week for which the automatic forecast spread function created weekly [forecasts](#).

**Note:** This does not update when you spread [forecasts](#) interactively.

### Last Week of Forecast

This field displays the number of the last week of the forecast that has a non-zero quantity or value. If this is a period forecast, the last week is the end week of the period.

### Spread Details

#### Stock Target over Intervals

Enter the forecast quantity or value to spread over the selected intervals. DRP breaks this down according to the seasonal profile previously selected. Leave this field blank to spread the forecast evenly across the intervals.

#### Forecast Intervals

Enter the range for which you want to generate period, weekly or daily [forecasts](#) over the specified time bands (intervals). The intervals must not overlap and must be in correct date order, that is, the From date must not be after the To date. The From and To weeks should correspond to the period start and end weeks in the [calendar](#) structure.

### Functions

#### Continue (F10)

Use this when updating the forecast quantity or ranges to apply the new values.

#### Display Structure (F20)

**Note:** This is only displayed if you use a seasonal profile with Entry Level set to Period.

Use this to display the [calendar](#) structure.

Press Enter or select **Continue (F10)** to display the Maintain Item Stock Forecast Period Targets window.

## Maintain Item Stock Forecast Period Targets Window

To display this window, complete the Maintain Item Stock Forecast Intervals Selection window and then press Enter or leave the Maintain Intervals field unchecked and then press Enter on the Maintain Item Stock Forecast Selection window.

You use this window to maintain maximum and period stock level targets and seasonal indices. You can profile, by stages, period stock level targets to daily and weekly targets, using different seasonal profiles for each stage.

### Fields

#### % of Group

**Note:** This field is output only.

This field displays the percentage stock-level requirement for this item, within the item group profile. This field is not displayed if you created the stock build using this function and have not included the item in the item group profile.

### **Stock Target Quantity/Value**

Enter the total forecast value. Use **Display Values (F18)** to switch the display between quantity and values. You cannot maintain the alternative display.

### **Seasonal Profile**

Enter a seasonal profile. This field defaults to the profile entered on the first window.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

This is the profile used if you select a period to week, or week to day, forecast break down. Leave this field blank to spread the forecast quantity or values evenly across the selected forecast periods.

### **Position to Period**

The default for the start of the period list is the current period. Enter a period number to reposition the list with that period displayed.

### **Table**

#### **Period/Start**

*Note: These fields are output only.*

Period records have a number in the format PP, where PP is the period number defined in the DC or [centre calendar](#) for the year. The start date is the first Monday in the period.

Weekly records have a number in the format PPWW, where PP is the period number and WW is the week number within the year defined in the [calendar](#). The start date is the Monday of the week.

Daily records have a weekly number and the actual date as the start date.

### **Index**

Enter the period index. DRP can retrieve this from the database or the seasonal profile. DRP uses this to calculate the individual period stock-level target quantity, or value, from the maximum target quantity or value in proportion to maximum period index.

### **Quantity or Value**

Enter the quantity or value for each forecasting period. You can generate this figure by applying seasonal indices.

Enter the period index. DRP uses this to calculate the individual forecast period quantities or values from the entered total quantity or value.

## Options

### **Select to Spread**

Use this to select either a period forecast to break down to weekly [forecasts](#) or a weekly forecast to break down to daily [forecasts](#). You cannot select a daily record.

## Functions

### **Barchart (F14)**

Use this to display a bar chart showing the forecast quantity or value distribution throughout the forecast year.

### **Apply Index (F17)**

Use this to spread the total forecast quantity or value over the forecast periods, according to the indices in each period, relative to the sum of the period indices.

### **Display Values/Display Quantities (F18)**

Use this to alternate between the quantity and value displays. You cannot maintain the alternative view.

### **Stock Profile (F22)**

Use this to maintain target stock levels and dates by which to build and consume stocks.

Select **Create (F8)** to create a new forecast or select **Update (F8)** to modify an existing forecast.

Use Select to Spread on a period or weekly forecast to display the Maintain Item Group Stock Forecasts Weekly/Daily Stock Levels pop-up.

**Caution:** Make sure you apply indices before you select Create/Update (F8).

## Maintain Item Stock Forecasts Weekly Spread Pop-up

To display this pop-up, use Select to Spread on a period record on the Maintain Item Stock Forecast Period Targets window.

You use this pop-up to break down period [forecasts](#) into weekly [forecasts](#).

## Fields

### **Total Quantity**

Enter the total quantity or value for the period. This field defaults is from the previous window.

### **Seasonal Profile**

Enter the seasonal profile used to break down the period forecast to weekly [forecasts](#). This field defaults from previous window.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

Leave the profile blank to spread the forecast quantity or value evenly across the weeks.

**Table****Index**

Enter the weekly index. This field defaults is from the seasonal profile. If the profile code is blank, DRP spreads the quantities evenly.

**Quantity or Value**

Enter the forecast quantity or value for each week. You can generate this figure by applying the weekly indices to the entered total quantity or value.

To display the previous window showing the weekly details, press Enter without entering any information.

**Options****Select to Spread**

Use this to select a weekly forecast to break down to daily [forecasts](#). If the Seasonal Profile field is blank, the forecast spreads evenly across the working days defined on the [calendar](#) week template.

**Functions****Apply Index (F17)**

Use this to spread the total forecast quantity or value over the weeks in the period, based on the weekly indices compared to the sum of the weekly indices for period.

Use Select to Spread to display the Maintain Item Stock Forecast Daily Spread pop-up.

## Maintain Item Stock Forecast Daily Spread Pop-up

To display this pop-up, use Select to Spread on a weekly forecast on the Maintain Item Stock Forecast Weekly Spread pop-up.

Alternatively, enter a quantity or value and use Select to Spread on the Maintain Item Stock Forecast Period Targets window.

You use this pop-up to break down weekly [forecasts](#) down into daily [forecasts](#).

**Fields****Entered.... (Total index and total value or quantity)**

Enter the total quantity or value for the week. This field defaults from the previous window.

To re-calculate the index total, press Enter.

To re-calculate the sum of all daily forecast quantities or values, press Enter. If the value is different to the entered total, a warning is displayed; select **Update (F8)** to override this and update the entered total quantity or value.

---

## Table

### Index (Untitled)

Enter the index. This field defaults is from the seasonal profile. If the profile code is blank, DRP sets the indices to **1** for each working day, based on the [calendar](#) weekly template.

### Quantity or Value (Untitled)

Enter the forecast quantity or value for each day. You can generate this by applying the daily indices to the total quantity or value.

## Functions

### Apply Index (F17)

Use this to spread the total quantity or value over the days in the week, based on the daily indices compared to the sum of daily indices for the week.

Press Enter to re-display the previous window showing forecast details.

## Maintain Item Stock Forecasts Bar Chart Window

To display this window, select **Barchart (F14)** on the Maintain Item Stock Forecast Period Targets window.

This window displays a graph of the item forecast quantity distribution throughout the forecast year, by week.

### Period Forecasts

DRP divides these by the number of weeks within the period. For example, a period forecast of 200 units for a 4-week period displays as 50 units per week.

### Daily Forecasts

DRP accumulates daily [forecasts](#) over a week and the resulting weekly total is displayed.

DRP calculates the Y-axis default from the maximum forecast quantity or value during the year. To re-set the maximum value, enter a figure in the Alter Scale field. If this field is blank, the display reverts to the original default.

## Fields

### Alter Scale

To change the forecast quantity axis scale, enter a new maximum forecast quantity in this field.

**Note:** Use Page Up and Page Down to display more weeks.

Select **Previous (F12)** to re-display the Maintain Item Sales Forecast Spread Forecast window.

## Maintain Item Stock Forecasts Stock Profile Window

To display this pop-up, select **Stock Profile (F22)** on the Maintain Item Group Stock [Forecasts](#) Period Targets window.

Use this window create a time-phased stock level plan. You specify when to build stocks, the target maximum stock, and build and consume dates.

### **Fields**

#### **From Date/To Date**

Enter the date on which to start the stock build and the date by which the stock should be back to the [safety stock](#) level.

#### **Target date**

Enter the date by which the stock should reach the target quantity. This must be within the To and From date range.

#### **Target Quantity or Value**

Enter the maximum quantity of stock to build by the specified date.

Press Enter to generate the stock level targets.

## Spread Stock Item Forecasts [10/STDRF]

Use this task to profile stock level targets automatically by period, week and day, using a seasonal profile selective within defined time intervals.

The seasonal profile set up on the DRP [item master](#) records appears as the default profile on the item selection window. You can change to an alternative profile or leave it blank.

**Note:** *An exception report highlights any existing stock level targets inconsistent with the interval parameters report. DRP does not update the targets.*

## Spread Item Stock Forecast Selection Window

To display this window, select the Spread Stock Item [Forecasts](#) task.

Use this window to enter the criteria for the spread item stock forecast.

### **Fields**

#### **Centre/DC**

Enter a [centre](#) or DC with periods and stockrooms defined.

Alternatively, use the prompt facility to select from the Select DRP [Centre](#)/DC pop-up.

**Year**

Enter the year, in YY format. You must have set up the year and [centre](#) or DC combination already.

**Item Group**

Enter a minor item group. If you leave the field blank, all item groups with existing item [forecasts](#) are displayed.

Alternatively, use the prompt facility to select from the Select Minor Item Group pop-up.

**Item Range**

Enter the required item range.

Alternatively, use the prompt facility to select from the Select Style, Select Colour and Select Size pop-ups.

**Note:** If you leave both the From and To fields blank, all existing item [forecasts](#) within the item group are displayed.

**Forecast Basis**

Select one of the following:

Quantity (1) - To maintain quantity [forecasts](#)

Value (2) - To maintain value [forecasts](#)

**Note:** If you previously maintained the forecast using the other option, DRP displays a warning. Select **Update (F8)** to continue.

Press Enter to display the Spread Item Stock Forecast Detail window.

## Spread Item Stock Forecast Detail Window

To display this window, enter the selection details and then press Enter on the Spread Item Stock Forecast Selection window.

Use this window to select one or more items for spreading over the specified intervals (time bands). These intervals must be in correct date order, that is, the From date must be before the To date, and you must enter at least one set.

## **Fields**

### **Select (Untitled)**

Choose Select to select an item forecast for profiling over the selected intervals.

### **Table**

#### **Seasonal PRF.**

Enter a seasonal profile if required.

Alternatively, use the prompt facility to select from the Select Seasonal Index pop-up.

### **Other Fields**

#### **Daily Forecasts From Week/To Week**

Enter a range of weeks for which to generate a daily forecast.

#### **Weekly Forecasts From Week/To Week**

Enter a range of weeks for which to generate a weekly forecast.

## **Functions**

### **Select All (F15)**

Use this to select all fields. You can then de-select items for which you do not want a forecast.

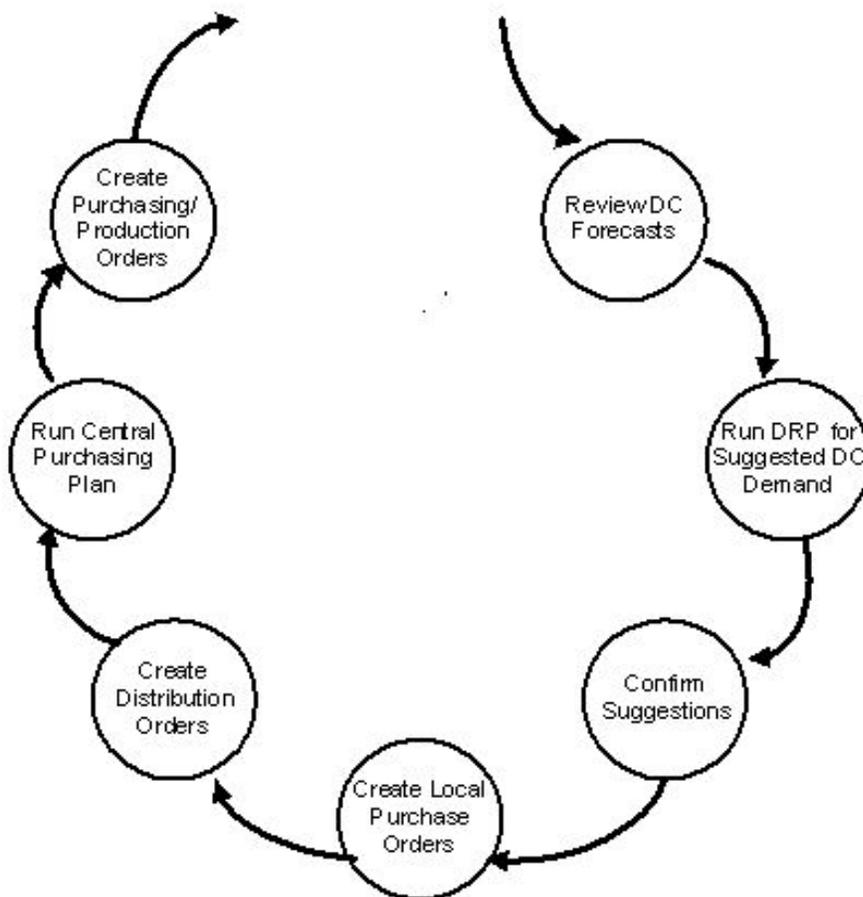
### **Display Values/Display Quantities (F18)**

Use this to change the display between value and quantity.

Select **Submit Job (F8)** to submit the job.

### The DRP Cycle

The following diagram represents the DRP Cycle:



This description represents a one-level DRP cycle run. You can repeat or partially repeat this cycle for each [network](#).

**Note:** You can define a [supply centre](#) in one [network](#) as a DC in another [network](#).

#### Review DC Forecasts

If you use [forecasts](#), review and update the stock and sales [forecasts](#) for each item at the DC. [Forecasts](#) are not mandatory in DRP.

### Evaluate DC Demand

Assess the [supply](#) and [demand](#) figures for all DCs within a specified [network](#). [Supply](#) plans are generated at item level for each [centre](#). The [supply](#) plans suggest new [supply](#) orders, from the [centre](#) or from external suppliers, and amend existing [supply](#) orders. They also delete all previous suggestions.

The plans provide [planners](#) with the information to match [supply](#) and [demand](#), check the feasibility of suggestions, monitor data integrity and assess the impact of new situations at each DC.

### Confirm Suggestions

Once you have reviewed and accepted the DC run suggestions, you can convert the suggestions to requisitions in the Requisitioning module. You can amend the requisitions if you want.

**Note:** *DRP deletes all outstanding requisitions for the stockrooms, and adds new ones from the latest DRP suggested orders.*

### Create Local Purchase Order

Use Requisitioning to convert the purchase requisitions, created from DRP, to purchase orders on external suppliers. DRP transfers purchase orders into Purchase Management.

### Create Distribution Orders

Use Requisitioning to convert the distribution requisitions, for [supply](#) from a [centre](#), into [distribution orders](#). DRP transfers [distribution orders](#) into Sales Order Processing and places the order lines against the [centre](#) stockroom defined to the item in DRP.

You can enter [distribution orders](#) directly into Sales Order Processing, by using the [Distribution Order](#) Entry or Amend options. Specify the From and To stockrooms, to automatically create a link between them. DRP creates an internal sales order against the [customer](#) defined for the To stockroom.

Note the following:

- DRP treats the distribution order as an internal sales order, and raises no invoice details. The customer is defined to the stockroom to receive the supply.
- On confirmation of despatch, DRP adds the distribution order lines to the DRP shipments in-transit file. If you have World Trade attached, and the transfer is across an EC border, DRP writes a movement record for processing within the World Trade module. DRP uses this to produce Intrastat and ESL reports, and to post the acquisition tax due on receipt of the goods.
- When the stockroom receives the distribution order lines, you need to confirm the goods as received within DRP.

### Run Central Supply Plan

Assess the [supply](#) and [demand](#) figures for the [supply centre](#). Suggest new purchase orders from external suppliers and recommend amendments to existing purchase orders.

**Note:** *If the [centre](#) is a Manufacturing site, you must define the Items at the [centre](#) to Manufacturing not DRP, and the [centre](#) run should be an MPS run not a DRP run.*

## Create Purchase/Production Orders

Create the requisitions from DRP suggestions and then convert them to purchase orders within Purchase Management.

You can create manufacturing orders from MPS suggestions within the Master Production Scheduling module. Refer to the Requisitioning or Manufacturing product guides for further details.

**Note:** You can automate the Evaluate DC [Demand](#), Confirm Suggestions, Create Local Purchase Order, Create [Distribution Orders](#) and Run Central [Supply Plan](#) steps by using the [Network Run](#) task. It performs the tasks of the DRP cycle in a one step batch job.

## DRP Run Processing Options

In each of the DRP run options, there are a number of ways in which you can select the items for re-planning.

There are two distinct DRP run types:

### Full Regeneration (1)

This re-plans all DRP items for the selected [network](#) or [centre](#).

### Selective Processing (3)

This selects a subset of items for re-planning based on the selection of ranges of DRP items, [planners](#), minor item groups, Inventory cost or usage elements, or preferred suppliers.

**Caution:** A previously used DRP run type of Selective (2) is no longer available but is still shown in some places.

***If you attempt to use this type, an error message is displayed.***

You can make these selections before submitting any of the DRP planning runs, that is, DC, [centre](#) or [network](#).

An item will only be re-planned at a particular [centre](#) or DC under the following conditions:

- It is within the range of items selected.
- And
- The DRP planner assigned to the item is within the range of DRP planners selected.
- And
- The Inventory minor item group to which the item belongs is within the range of Inventory minor item groups selected.
- And
- The Inventory cost or usage element calculated for that item is within the range of cost or usage elements selected.
- And

- The preferred supplier defined on the Inventory item/stockroom details is within the range of preferred suppliers selected.

## Evaluate DC Demand [1/STDRP]

Use this task to assess the [supply](#) and [demand](#) status for items handled at the DCs within a selected [network](#).

DRP produces a separate [schedule](#) for each DC, with [supply](#) and [demand](#) quantities, and suggested actions, for each item.

## Evaluate DC Demand Window

To display this window, select the Evaluate DC [Demand](#) task.

Use this window to select the [network](#) for which you want to evaluate DC [demand](#).

### **Fields**

#### **Enter Network Code**

Enter a [network](#) code.

Alternatively, use the prompt facility to select from the Select DRP [Networks](#) pop-up.

Select a [network](#) or enter a code and then press Enter to display the DC Run Selection window.

## DC Run Selection Window

To display this window, select a [network](#) or enter a [network](#) code and then press Enter on the Evaluate DC [Demand](#) window.

You use this window to enter the criteria for a DRP processing run and submit the run.

### **Fields**

#### **DRP Run Type**

Select the type of DRP run you want to generate:

Full Regeneration (1)

This re-plans all items.

Selective (3)

---

This re-plans a subset of items based on a selection of ranges of items, [planners](#), minor item groups, Inventory cost or usage elements and preferred suppliers. Select **Review Specification (F14)** to enter the ranges.

## Enter

### Current Date

The date defaults to the current date. DRP uses this in conjunction with [Overdue Days](#) to establish the start date for the DRP run as follows:

Start Date = Current Date - Overdue Days

### Overdue Days

Specify the number of days before the current date within which the module still includes outstanding [supply](#) and [demand](#) orders (excluding any [forecasts](#)).

### Time Fence Days

Specify the number of days, forward from the current date of the DRP run, during which the plan remains frozen. DRP sets any [supply](#) suggestions, required within this period, for action on the first working day after the time fence. If this field is blank or zero, DRP calculates the time fences at item level (defined within [Distribution Item](#) Master), based on lead times.

### Calculate Safety Stock

Use this checkbox as follows:

Unchecked - To consider only fixed [safety stocks](#), as defined on the [Distribution Item](#) Master file

Checked - To calculate [safety stock](#) cover for DRP items based on forecasted [demand](#)

### Safety Stock Cover Weeks/Days

Specify the number of weeks and days safety cover to use, as a blanket value for all items in this run. DRP calculates this from forecast [demand](#) for each item; you must therefore enter sales [forecasts](#) for all items requiring [safety stock](#) cover.

If this field is blank or zero and you require [safety stock](#) calculations, the number of weeks or days safety cover defaults to that entered on the [Distribution Item](#) Master file.

### End Date

Specify the last date for the planning run to consider. This field defaults to the end date of the previous run.

### Include Forecasts

Select one of the following to indicate the types of [forecasts](#) for the planning run to consider:

Sales (1) - To include sales [forecasts](#) only

Stock building (2) - To include stock level [forecasts](#) only

Both (3) - To include both sales and stock level [forecasts](#)

Neither (0) - To exclude all [forecasts](#) and only consider the actual [demand](#)

As per item (Blank) - DRP considers each item separately, with [forecasts](#) included or excluded based on the [Distribution Item](#) Master and DRP Forecast field entry.

## **Functions**

### **Review Specification (F14)**

Use this to enter further selective processing details. The Selective DC Run Criteria pop-up is displayed.

### **Restrict Extractions (F16)**

Use this to exclude certain purchase orders. The DC Run Restrict Order Extractions for Run pop-up is displayed.

### **Print Last Run Details (F19)**

Use this to print a report of the last run.

Select **Submit (F8)**. This validates all details and submits the regeneration plan batch job.

## Selective DC Run Criteria Pop-up

To display this pop-up, set the DRP Run Type field to Selective and then select **Review Specification (F14)** on the DC Run Selection window.

You use this pop-up to enter the details you want to be included in a selective processing run. The selections for the last selective processing run for the [network](#) are displayed. You can enter selection details for each DC in the selected [network](#). Each time you press Enter, the next DC in the [network](#) displays.

***Note:** You do not have to enter information in all of the fields, just the ranges that you want to include in the DC Run.*

### **Rules for Range Selection:**

Leave the From and To fields blank to select all items.

If you enter a From value and leave the To field blank, the To field defaults to the value in the From field.

If you enter a To value, you must enter a From value.

The value in the To field must not be less than the value in the From field.

## **Fields**

### **Item From/To**

Enter a range of items to be re-planned.

Alternatively, use the prompt facility to select from the Select DRP Items for [Centre/DC](#) pop-up.

### **Planner From/To**

Enter a range of DRP [planners](#).

---

Alternatively, use the prompt facility to select from the Select [Planner](#) pop-up.

**Item Group From/To**

Enter a range of Inventory minor item groups.

Alternatively, use the prompt facility to select from the PGMN Product Group - Minor pop-up.

**Value/Usage Class From/To**

Enter a range of Inventory values or usage classes. These are defined in the Inventory company profile on the ABC classification table for each stockroom.

**Preferred Supplier From/To**

Enter a range of preferred suppliers. You define preferred suppliers in the Stockroom Details task in Style Inventory Management.)

Alternatively, use the prompt facility to select from the pop-up.

Press Enter to re-display the DRP DC Run Selection window.

## DC Run Restrict Order Extractions for Run Pop-up

To display this pop-up, select **Restrict Extractions (F16)** on the DC Run Selection window.

Use this pop-up to select the purchase orders to extract for the DRP processing run. This improves processing efficiency by restricting unnecessary data extraction.

**Fields****Exclude Unconfirmed Quantities on Scheduled Purchase Orders**

Use this checkbox as follows:

Unchecked - To include all [scheduled](#) purchase order quantities whether confirmed or not  
DRP assigns the unscheduled order quantities to the last planning period in the DRP run.

Checked - To exclude unconfirmed order quantities from [scheduled](#) orders

**Exclude Confirmed Purchase Orders (Outstanding, GI, Inspection)**

This is concerned with purchase orders not yet accepted into stock.

Use this checkbox as follows:

Unchecked - To include all purchase order quantities for processing

Checked - To exclude all purchase orders from processing

This is particularly useful where there is no local purchasing at the DC.

Press Enter to update the exclusion criteria.

## Run DRP for Centre [2/STDRP]

You use this task to assess the [supply](#) and [demand](#) at the selected [supply centre](#), and to produce a central [supply](#) plan.

The [supply](#) plan may contain suggested purchase orders or amendments to existing orders, or both.

## Run DRP for Centre Window

To display this window, select the Run DRP for [Centre](#) task.

You use this window to select the [supply centre](#) to evaluate.

### **Fields**

#### **Enter Centre Code**

Enter the code of a [centre](#) defined to at least one [network](#).

Alternatively, use the prompt facility to select from the Select DRP [Centre](#) pop-up.

Select a [centre](#) code or enter a code and then press Enter to display the [Centre](#) Run Selection window.

## Centre Run Selection Window

To display this window, select a [centre](#) code or enter a [centre](#) code and then press Enter on the Run DRP for [Centre](#) window.

You use this window to specify the criteria for, and submit, a DRP processing run.

### **Fields**

#### **DRP Run Type**

Select the type of DRP run you want to generate:

Full Regeneration (1)

This re-plans all items.

Selective (3)

This re-plans a subset of items based on a selection of ranges of items, [planners](#), minor item groups, Inventory cost or usage elements and preferred suppliers. Select **Review Specification (F14)** to enter the ranges.

### **Enter**

#### **Current Date**

The date defaults to the current date. DRP uses this in conjunction with [Overdue Days](#) to establish the start date for the DRP run as follows:

---

Start Date = Current Date - [Overdue Days](#)

### **Overdue Days**

Specify the number of days before the current date within which the module still includes outstanding [supply](#) and [demand](#) orders (excluding any [forecasts](#)).

### **Time Fence Days**

Specify the number of days, forward from the current date of the DRP run, during which the plan remains frozen. DRP sets any [supply](#) suggestions, required within this period, for action on the first working day after the time fence. If this field is blank or zero, DRP calculates the time fences at item level (defined within [Distribution Item](#) Master), based on lead times.

### **Calculate Safety Stock**

Use this checkbox as follows:

Unchecked - To consider only fixed [safety stocks](#), as defined on the [Distribution Item](#) Master file

Checked - To calculate [safety stock](#) cover for DRP items based on forecasted [demand](#)

### **Safety Stock Cover Weeks/Days**

Specify the number of weeks and days safety cover to use, as a blanket value for all items in this run. DRP calculates this from forecast [demand](#) for each item; you must therefore enter sales [forecasts](#) for all items requiring [safety stock](#) cover.

If this field is blank or zero and you require [safety stock](#) calculations, the number of weeks or days safety cover defaults to that entered on the [Distribution Item](#) Master file.

### **End Date**

Specify the last date for the planning run to consider. This field defaults to the end date of the previous run.

### **Include Forecasts**

Select one of the following to indicate the types of [forecasts](#) for the planning run to consider:

Sales (1) - To include sales [forecasts](#) only

Stock building (2) - To include stock level [forecasts](#) only

Both (3) - To include both sales and stock level [forecasts](#)

Neither (0) - To exclude all [forecasts](#) and only consider the actual [demand](#)

As per item (Blank) - DRP considers each item separately, with [forecasts](#) included or excluded based on the [Distribution Item](#) Master and DRP Forecast field entry.

## **Functions**

### **Review Specification (F14)**

Use this to enter further selective processing details. The Selective [Centre](#) Run Criteria pop-up is displayed.

**Restrict Extractions (F16)**

Use this to exclude certain purchase orders. The [Centre](#) Run Restrict Order Extractions for Run pop-up is displayed.

**Print Last Run Details (F19)**

Use this to print a report of the last run.

Select **Submit (F8)**. This validates all details and submits the regeneration plan batch job.

## Selective Centre Run Criteria pop-up

To display this window, set the DRP Run Type field to Selective and then select **Review Specification (F14)** on the [Centre](#) Run Selection window.

Use this pop-up to enter the criteria for the selective processing run.

You do not have to enter information in all the fields, just the ranges you want to include in the [Centre](#) Run.

**Rules for Range Selection:**

Leave the From and To fields blank to select all items.

If you enter a From value and leave the To field blank, the To field defaults to the value in the From field.

If you enter a To value, you must enter a From value.

The value in the To field must not be less than the value in the From field.

**Fields****Item From/To**

Enter a range of items to be re-planned.

Alternatively, use the prompt facility to select from the Select DRP Items for [Centre](#)/DC pop-up.

**Planner From/To**

Enter a range of DRP [planners](#).

Alternatively, use the prompt facility to select from the Select [Planner](#) pop-up.

**Item Group From/To**

Enter a range of Inventory minor item groups.

Alternatively, use the prompt facility to select from the PGMN Item Group - Minor pop-up.

**Value/Usage Class From/to**

Enter a range of Inventory values or usage classes. These are defined in the Inventory company profile on the ABC classification table for each stockroom.

**Preferred Supplier From/To**

Enter a range of preferred suppliers. You define preferred suppliers in the Stockroom Details task in Style Inventory Management.)

Alternatively, use the prompt facility to select from the pop-up.

Press Enter to re-display the DRP [Centre](#) Run Selection window.

## Centre Run Restrict Order Extractions for Run Pop-up

To display this pop-up, select **Restrict Extractions (F16)** on the [Centre](#) Run Selection window.

Use this pop-up to select the purchase orders to extract for the DRP processing run. This improves processing efficiency by restricting unnecessary data extraction.

**Fields****Exclude Unconfirmed Quantities on Scheduled Purchase Orders**

Use this checkbox as follows:

Unchecked - To include all [scheduled](#) purchase order quantities whether confirmed or not  
DRP assigns the unscheduled order quantities to the last planning period in the DRP run.

Checked - To exclude unconfirmed order quantities from [scheduled](#) orders

**Exclude Confirmed Purchase Orders (Outstanding, GI, Inspection)**

This is concerned with purchase orders not yet accepted into stock.

Use this checkbox as follows:

Unchecked - To include all purchase order quantities for processing

Checked - To exclude all purchase orders from processing

Press Enter to update the exclusion criteria.

## Network Run [3/STDRP]

You use this task to access the [supply](#) and [demand](#) for the whole of the selected [network](#) within a single run.

The [Network](#) Run task will carry out the following automated processes:

- Evaluate DC Demand - full regeneration or selective
- Confirm supply suggestions
- Create local purchase orders
- Create distribution orders

- Run central supply plan - full regeneration only

This removes the user intervention stage of amending suggestions and creating orders (via Requisitioning) for the DCs.

The automated run is particularly useful where [supply](#) suggestions are unlikely to require many amendments. You can assess the whole [network](#) with a single overnight run. You can review the resulting DC and [centre schedules](#) using [schedule](#) enquiries or reports.

**Note:** You can make any amendments to the generated [supply](#) orders by maintaining the purchase order (via Purchase Management) or [distribution order](#) (via the [Distribution Order Amend](#) task).

## Network Run Window

To display this window, select the [Network](#) Run task.

You use this window to select the [network](#) to evaluate.

### Fields

#### **Enter Network Code**

Enter a [network](#) code, as defined to DRP via [Network](#) Maintenance.

Alternatively, use the prompt facility to select from the Select DRP [Networks](#) pop-up.

Select a [network](#) or enter a [network](#) and then press Enter to display the [Network](#) Run Selection window.

## Network Run Selection Window

To display this window, select a [network](#) or enter a [network](#) and then press Enter on the [Network](#) Run window.

You use this window to specify the criteria for, and submit, a DRP processing run.

### Fields

#### **DRP Run Type**

Select the type of DRP run you want to generate:

Full Regeneration (1)

This re-plans all items.

Selective (3)

This re-plans a subset of items based on a selection of ranges of items, [planners](#), minor item groups, Inventory cost or usage elements and preferred suppliers. Select **Review Specification (F14)** to enter the ranges.

### **Enter**

### **Current Date**

The date defaults to the current date. DRP uses this in conjunction with [Overdue Days](#) to establish the start date for the DRP run as follows:

Start Date = Current Date - [Overdue Days](#)

### **Overdue Days**

Specify the number of days before the current date within which the module still includes outstanding [supply](#) and [demand](#) orders (excluding any [forecasts](#)).

### **Time Fence Days**

Specify the number of days, forward from the current date of the DRP run, during which the plan remains frozen. DRP sets any [supply](#) suggestions, required within this period, for action on the first working day after the time fence. If this field is blank or zero, DRP calculates the time fences at item level (defined within [Distribution Item](#) Master), based on lead times.

### **Calculate Safety Stock**

Use this checkbox as follows:

Unchecked - To consider only fixed [safety stocks](#), as defined on the [Distribution Item](#) Master file

Checked - To calculate [safety stock](#) cover for DRP items based on forecasted [demand](#)

### **Safety Stock Cover Weeks/Days**

Specify the number of weeks and days safety cover to use, as a blanket value for all items in this run. DRP calculates this from forecast [demand](#) for each item; you must therefore enter sales [forecasts](#) for all items requiring [safety stock](#) cover.

If this field is blank or zero and you require [safety stock](#) calculations, the number of weeks or days safety cover defaults to that entered on the [Distribution Item](#) Master file.

### **End Date**

Specify the last date for the planning run to consider. This field defaults to the end date of the previous run.

### **Include Forecasts**

Select one of the following to indicate the types of [forecasts](#) for the planning run to consider:

Sales (1) - To include sales [forecasts](#) only

Stock building (2) - To include stock level [forecasts](#) only

Both (3) - To include both sales and stock level [forecasts](#)

Neither (0) - To exclude all [forecasts](#) and only consider the actual [demand](#)

As per item (Blank) - DRP considers each item separately, with [forecasts](#) included or excluded based on the [Distribution Item](#) Master and DRP Forecast field entry.

## **Functions**

**Review Specification (F14)**

Use this to enter further selective processing details. The Selective [Network](#) Run Criteria pop-up is displayed.

**Restrict Extractions (F16)**

Use this to exclude certain purchase orders. The [Network](#) Run Restrict Order Extractions for Run pop-up is displayed.

**Print Last Run Details (F19)**

Use this to print a report of the last run.

Select **Submit (F8)**. This validates all details and submits the regeneration plan batch job.

## Selective Network Run Selection Criteria Pop-up

To display this window, set the DRP Run Type field to Selective and then select **Review Specification (F14)** on the [Network](#) Run Selection window.

You use this window to enter the details you want to be included in a selective processing run. The selections for the last selective processing run for the [network](#) are displayed. You can enter selection details for each [centre](#) or DC in the selected [network](#). Each time you press Enter, the next [centre](#) or DC in the [network](#) is displayed.

**Note:** *You do not have to enter information in all of the fields, just the ranges that you want to include in the [Network](#) Run.*

**Rules for Range Selection:**

Leave the From and To fields blank to select all items.

If you enter a From value and leave the To field blank, the To field defaults to the value in the From field.

If you enter a To value, you must enter a From value.

The value in the To field must not be less than the value in the From field.

**Fields****Item From/To**

Enter a range of items to be re-planned.

Alternatively, use the prompt facility to select from the Select DRP Items for [Centre/DC](#) pop-up.

**Planner From/To**

Enter a range of DRP [planners](#).

Alternatively, use the prompt facility to select from the Select [Planner](#) pop-up.

**Item Group From/To**

Enter a range of Inventory minor item groups.

Alternatively, use the prompt facility to select from the PGMN Product Group - Minor pop-up.

#### **Value/Usage Class From/to**

Enter a range of Inventory values or usage classes. These are defined in the Inventory company profile on the ABC classification table for each stockroom.

#### **Preferred Supplier From/To**

Enter a range of preferred suppliers. You define preferred suppliers in the Stockroom Details task in Style Inventory Management.)

Alternatively, use the prompt facility to select from the pop-up.

Press Enter to re-display the DRP [Network](#) Run Selection window.

## Network Run Restrict Order Extractions for Run Pop-up

To display this pop-up, select **Restrict Extractions (F16)** on the [Network](#) Run Selection window.

Use this pop-up to select the purchase orders to extract for the DRP processing run. This improves processing efficiency by restricting unnecessary data extraction.

### **Fields**

#### **Exclude Unconfirmed Quantities on Scheduled Purchase Orders**

Use this checkbox as follows:

Unchecked - To include all [scheduled](#) purchase order quantities whether confirmed or not  
DRP assigns the unscheduled order quantities to the last planning period in the DRP run.

Checked - To exclude unconfirmed order quantities from [scheduled](#) orders

#### **Exclude Confirmed Purchase Orders (Outstanding, GI, Inspection)**

This is concerned with purchase orders not yet accepted into stock.

Use this checkbox as follows:

Unchecked - To include all purchase order quantities for processing

Checked - To exclude all purchase orders from processing

Press Enter to update the exclusion criteria.

## Distribution Order Entry [4/STDRP]

[Distribution orders](#) are internal orders placed on [supply centres](#) in a [network](#) to satisfy [demand](#) for items at the DCs: a movement of stock between two stockrooms in a single company. It is a formal request for a transfer of stock.

You must set up a dummy [customer](#) in the [Customer](#) Maintenance task in Sales Order Processing. You then need to assign each DRP stockroom to a dummy [customer](#), known as the internal [customer](#), using the DRP [Customer](#) task, or if you are using World Trade, the World Trade Stockroom task. The [distribution order](#) is then processed through Sales Order Processing, as a normal sales order, except the [customer](#) is a dummy [customer](#) - a DRP stockroom.

[Distribution orders](#) are created in different ways: they can be created automatically, for instance by the [network](#) planning run, or you can use the [Distribution Order](#) Entry task to enter the orders.

You create the [distribution order](#) with a From and a To stockroom, and the software allocates a sales order number. DRP uses the order number and the internal [customer](#) associated with the To stockroom to process the order through the allocation, pick and confirm despatch stages. The dummy address can be a particular stockroom to [supply](#) DCs, or you can override the delivery address each time you enter a [distribution order](#).

After confirm despatch, the confirm receipt procedure receives the stock into the To stockroom and updates the stock balance. Sales Order Processing identifies the order as a [distribution order](#) and so does not generate an invoice.

Therefore, for most of its processing cycle, you manage a [distribution order](#) using functions in the Sales Order Processing or Warehousing modules.

If the From and To stockrooms are in different EC countries, confirm despatch creates World Trade movements. DRP uses these movements to produce Intrastat and ESL reports and to post the acquisition tax due on receipt of the goods.

**Note:** DRP takes into account manually entered [distribution orders](#) in the distribution planning runs.

---

## Distribution Order Entry Selection Window

To display this window, select the [Distribution Order](#) Entry task.

You use this window to select the despatching and receiving distribution stockrooms, and to specify the required despatch date for the [distribution order](#). If you create a number of [distribution orders](#) sequentially, the previously created order details are displayed.

### **Fields**

#### **From Stockroom**

Enter the stockroom to source the [distribution order](#).

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

**Note:** *The From stockroom must be defined as a depot in Sales Order Processing.*

#### **To Stockroom**

Enter the stockroom to receive the [distribution order](#). This stockroom must have an internal [customer](#) code attached to it in Sales Order Processing.

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

#### **Despatch Due Date**

Enter or select the date on which the [distribution order](#) is due for despatch.

Press Enter to display the [Distribution Order](#) Entry Delivery Address Override window.

## Distribution Order Entry Delivery Address Override Window

To display this window, enter the required details and then press Enter on the Distribution Entry Selection window.

You can use this window to override the delivery name and address that appear on the despatch note.

### **Fields**

#### **Delivery Name and Address**

Enter the delivery name and address to appear on the pick and despatch notes for the [distribution order](#). This defaults to the delivery address defined to the internal [customer](#) for the receiving stockroom.

### **Functions**

#### **Internal Text (F21)**

Use this to add or maintain internal order header text.

#### **External Text (F22)**

Use this to add or maintain external order header text.

Press Enter to display the [Distribution Order](#) Line Entry window.

## Distribution Order Entry Lines Window

To display this window, press Enter on the Order Entry Delivery Address window.

You use this window to enter [distribution order](#) lines. If the despatch date is within the time fence and sufficient stock exists in Inventory, DRP automatically allocates the line. Otherwise, the quantity shows in reverse image as unallocated.

### **Fields**

#### **Item**

Enter an item. The item must be defined to both the From and To stockrooms for the order. Alternatively, use the prompt facility to select from the [Item Master](#) Scan pop-up.

#### **Qty**

Enter the quantity required.

#### **Dsp**

Enter or select the despatch date. This defaults to the due date from the previous window.

#### **Rcpt**

Enter or select the receipt date. If you leave this field blank, DRP calculates the receipt date by the item lead time.

**Note:** *You do not need to enter both despatch and receipt dates. If you enter one, DRP calculates the other based on the lead time at the To stockroom.*

### **Options**

#### **Amend**

Use this to amend the order line details. The line details are displayed for amendment in the fields at the bottom of the screen.

#### **Int Text**

Use this to enter internal text for the order line.

#### **Ext Text**

Use this to enter external text for the order line.

#### **Delete**

Use this to delete the line from the order. This reverses any existing allocations.

**Note:** *No warning or confirmation pop-up is displayed if you select this option. The line is deleted immediately.*

### **Avail**

Use this to enquire on the current stock availability for the item at the From stockroom and the current [supply](#) and [demand](#) situation.

### **Force Alloc**

Use this to allocate a partially or wholly unallocated order line fully.

Allocation takes place regardless of the available stock quantity, allocation priority or allocation time fence.

### **Dealloc**

Use this to de-allocate a fully or partially allocated order line.

## **Functions**

### **Delete (F11)**

Use this to delete the whole order. A confirmation pop-up is displayed. Select **Confirm Delete (F11)** to confirm the deletion.

### **Restart (F15)**

Use this to abandon all changes made since the last update and return to the [Distribution Order Entry Selection](#) window. A confirmation pop-up is displayed. Select **Exit (F3)** to confirm the restart.

Select **Update (F8)** to update the [distribution order](#) details and display [distribution order](#) numbers.

## Distribution Order Amendment [5/STDRP]

You use this task to amend an existing [distribution order](#). You can amend the order header or order line details. If you do not know the order number, you can enquire on all [distribution orders](#) by internal [customer](#).

## Distribution Order Amendment Selection Window

To display this window, select the [Distribution Order Amend](#) task.

Use this window to select the [distribution order](#) to amend.

### **Fields**

#### **Order Number**

Enter an existing [distribution order](#) number.

#### **Amend Header or Lines**

Select one of the following:

Header (1) - To amend header level details

Lines (2) - To amend line level details

### **Internal Customer**

If you do not know the correct order number, you can enter an internal [customer](#) (i.e. the dummy [customer](#) assigned to a stockroom) to list all the [distribution orders](#) for that [customer](#).

Alternatively, use the prompt facility to select from the Select [Customer](#) pop-up.

Press Enter to display the next window.

## Distribution Order Amendment Header Window

To display this window, set Amend Header or Lines to Header and then press Enter on the [Distribution Order](#) Amendment Selection window.

You use this window to override the delivery name and address details that will appear on the despatch note.

### **Fields**

#### **Despatch Due Date**

Enter or select the date on which the [distribution order](#) is due for despatch.

#### **Delivery Name and Address**

Enter the name and address to print on the pick or despatch notes, or both, for the [distribution order](#).

### **Functions**

#### **Internal Text (F21)**

Use this to add or maintain internal order header text.

#### **External Text (F22)**

Use this to add or maintain external order header text.

Press Enter to update any changes and re-display the Order Amendment Selection window.

## Distribution Order Amendment Lines Window

To display this window, set Amend Header or Lines to Lines and then press Enter on the [Distribution Order](#) Amendment Selection window.

You use this window to amend the [distribution order](#) lines. If the despatch date is within the time fence, and sufficient stock exists in Inventory, DRP automatically allocates the line. Otherwise, the quantity shows in reverse image as unallocated.

---

## **Fields**

### **Item**

Enter an item. The item must be defined to both the From and To stockrooms for the order.

Alternatively, use the prompt facility to select from the [Item Master](#) Scan pop-up.

### **Qty**

Enter the quantity required.

### **Dsp**

Enter or select the despatch date. This defaults to the due date from the previous window.

### **Rcpt**

Enter or select the receipt date. If you leave this field blank, DRP calculates the receipt date by the item lead time.

***Note:** You do not need to enter both despatch and receipt dates. If you enter one, DRP calculates the other based on the lead time at the To stockroom.*

## **Options**

### **Amend**

Use this to amend the order line details. The line details are displayed for amendment in the fields at the bottom of the screen.

### **Int Text**

Use this to enter internal text for the order line.

### **Ext Text**

Use this to enter external text for the order line.

### **Delete**

Use this to delete the line from the order. This reverses any existing allocations.

***Note:** No warning or confirmation pop-up is displayed if you select this option. The line is deleted immediately.*

### **Avail**

Use this to enquire on the current stock availability for the item at the From stockroom and the current [supply](#) and [demand](#) situation.

### **Force Alloc**

Use this to allocate a partially or wholly unallocated order line fully.

Allocation takes place regardless of the available stock quantity, allocation priority or allocation time fence.

### **Dealloc**

Use this to de-allocate a fully or partially allocated order line.

## **Functions**

### **Delete (F11)**

Use this to delete the whole order. A confirmation pop-up is displayed. Select **Confirm Delete (F11)** to confirm the deletion.

### **Restart (F15)**

Use this to abandon all changes made since the last update and return to the [Distribution Order Amendment Selection](#) window. A confirmation pop-up is displayed. Select **Exit (F3)** to confirm the re-start.

Select **Update (F8)** to update [distribution order](#) details and display the [distribution order](#) number.

## Record Transfers Out [6/STDRP]

You can use this task to record the first part of the transfer of stock from one stockroom to another.

## Record Transfer Out Selection Window

To display this window, select the Record Transfers Out task.

Use this window to select the stockroom that this transaction affects, in addition to specifying the date, reference information and reason code for the transaction.

### **Fields**

#### **From Stockroom**

Enter the transferring stockroom for the item. This stockroom must exist on the company profile. Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

#### **To Stockroom**

Enter the receiving stockroom for the item. This stockroom must exist on the company profile. Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

#### **Internal Customer**

Enter the name and code of an existing internal [customer](#) in this field (i.e. one that is associated with a stockroom).

Alternatively, use the prompt facility to select from the Select [Customer](#) pop-up.

#### **Ref. No. Date & Type**

This field has 3 parts:

- a Enter the reference number of the movement, using up to 14 alphanumeric characters. You can link this with the reference type specified.
- b Enter or select a date to be used as the reference date. This field defaults to the current system date. The reference date is cross-referenced with the table of period and week end dates, to decide the week and period numbers for ageing the stock movement and history records.
- c Enter the reference type using up to three alphanumeric characters. You can define these in the Descriptions file under major type TRAN. See the Descriptions Maintenance section for further information.

You can use the prompt facility on the third part of this field to select from the TRAN Transaction Reference Type pop-up.

**Note:** *This information is written to the Movement History file. To help you recognise and analyse the movements, you can view it and report on it.*

#### **Narrative**

Enter the narrative or description associated with the movement, using up to 20 alphanumeric characters.

#### **Reason Code**

Enter a reason code chosen from those defined in the Descriptions file under major type MOVR. Enter this code to indicate why the stock status code has changed.

Alternatively, use the prompt facility to select from the MOVR Transaction Reason Codes pop-up.

**Note:** *The next two fields are only displayed when you have confirmed the movement and have re-displayed this window so that you can leave the task.*

#### **No. of Movements in Last Batch**

This field displays the number of movements you have processed during this transaction and is for information only.

#### **Last Item Processed**

This field displays the last item that was processed during the transaction and is for information only.

Press Enter to display the Record Transfer Out Detail window.

## Record Transfer Out Detail Window

To display this window, press Enter on the Record Transfer Out Selection window.

Use this window to record the details of the stock transfer between the selected stockrooms.

**Note:** *The fields at the bottom of the window default from the information you specified on the Record Transfer Out Selection window.*

## **Fields**

### **From Stockroom**

This field displays the code of the transferring stockroom.

### **To Stockroom**

This field displays the code of the receiving stockroom.

### **Generated Reference**

This field displays a unique code number automatically generated by the software to identify this transfer.

### **Item**

Enter the item, using up to 15 alphanumeric characters. It must be defined to both stockrooms through Inventory Maintenance. You can amend the item displayed in this field.

Alternatively, use the prompt facility to select from the [Item Master](#) Scan pop-up.

### **Movement Qty**

Enter the quantity you want to transfer, using up to 11 digits including three decimal places.

**Note:** *If you transfer a quantity that results in a negative stock balance, Inventory will display a warning. You can continue with the transaction if you have decided to accept a negative stock balance in this stockroom. This is set on the stockroom record of the Inventory company profile by checking the Negative Stock Allowed field). In this case, select **Continue (F8)** to override the warning message.*

### **Lot**

Enter the existing lot reference number that is affected by this movement.

Alternatively, use the prompt facility to select from the Select Lot Reference pop-up.

### **Quantity Units**

Enter the unit of measure code, as defined in the Descriptions file under major type UNIT. This is the unit of measure in which the movement quantity is expressed. Only those units defined for the item are allowed. The unit of measure defaults to that defined as the issue unit for this item and stockroom combination, but you can change it here.

You can use the prompt facility to select from the Purchase/Issue Unit Selection pop-up.

### **Cost/Unit**

This field displays the cost/unit for this movement, using up to 15 numeric characters including five decimal places.

### **Narrative**

You can override the existing narrative.

### **Reason Code**

Enter the reason code for this movement.

Alternatively, use the prompt facility to select from the MOVR Transaction Reason Codes pop-up.

**Ref. No. Date & Type**

The first part of this field displays the reference number that you specified on the selection window. You can change this for each item if required.

The second part of this field displays the movement date that you specified on the selection window. You can change this for each item if required.

The third part of this field displays the reference type code that you specified on the selection window. You can change this for each item if required.

You can use the prompt facility to select from the TRAN Transaction Reference Type pop-up.

This transaction type:

- Subtracts from the physical stock in the From stockroom
- Re-calculates the available stock in the From stockroom
- Add to in transit stock in the To stockroom
- Updates the usage at the From stockroom
- The date of issue is updated at the From stockroom

**Options****Amend**

Use this to select a line you want to amend. The details are then displayed at the base of the window for modification.

## **Functions**

### **Despatch Details (F18)**

If you are using Centralised Document Processing, use this function to record additional despatch information associated with the movement of goods.

Once all the details for this issue are correct, press Enter. Press Enter again to display the movement details.

## **Confirm Shipment Receipt [7/STDRP]**

Use this task to confirm the receipt of shipment. This maintains the in transit balances and updates the stock and costs at the receiving stockroom. The acquisition movement is written at the point of internal receipt.

If the receiving stockroom is defined to the Warehousing module, you must enter the appropriate details within this task to include items in the put-away processing within Warehousing

## **Confirm Shipment Receipt Selection Window**

To display this window, select the Confirm Shipment Receipt task.

Use this window to confirm the receipt at a stockroom of stock in transit from another stockroom within the company. Inventory updates the records for the receiving stockroom. If you have defined this stockroom to Warehousing, you can use this task to enter details to include the items in the put-away processing of Warehousing.

## **Fields**

### **From Stockroom**

Enter the transferring stockroom for the item. This stockroom must exist on the company profile.

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

### **To Stockroom**

Enter the receiving stockroom for the item. This stockroom must exist on the company profile.

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

**Note:** *If you enter a specific order or consignment number, you do not need to specify From and To stockroom codes.*

### **Distribution Order Number**

Enter the [distribution order](#) number, to transfer items between stockrooms in different locations.

To restrict the information displayed on the receipt screen, enter the [distribution order](#) number.

Both the order number and despatch sequence are required to select an individual despatch record. For all despatches relating to an order, only the order number is required.

If this information is left blank, all details for the selected stockrooms will be displayed.

After selection of the required fields, a window is displayed, showing the lines on the shipment for receipt.

### **Consignment Number**

Enter an Advanced Shipping consignment number, to display all the orders associated with this consignment.

**Caution:** You cannot enter both an Advanced Shipping consignment number and a distribution order number.

**Note:** If you use Style DRP, and no items are found in the Style Inventory in transit file for the specified selection criteria, an error message is displayed.

Press Enter to confirm the details and display the Confirm Shipment Receipt Details window.

## Confirm Shipments Receipt Details Window

To display this window, press Enter on the Confirm Shipment Receipt Selection window.

Use this window to select the items within the received shipment from the list of displayed items in transit. The items are added to this in transit list when a [distribution order](#) is confirmed as despatched from a stockroom in STDRP, Sales Order Processing or Warehousing.

You must confirm the whole of the quantity despatched as received before it is removed from the in transit list. You can do this across more than one shipment receipt.

### **Fields**

#### **From Stockroom**

This field displays the stockroom code and description entered on the previous window or the despatching stockroom if you entered a [distribution order](#).

#### **From**

This field displays the [centre](#).

#### **To Stockroom**

This field displays the receiving stockroom as entered on the previous window. This is automatically displayed if you entered a [distribution order](#).

#### **Distribution Order Number**

This information is displayed if the [Distribution Order](#) Number was entered on the selection window.

#### **Select All Lines to Update**

Use this checkbox as follows:

Unchecked - Not to update all lines

Checked - To update all lines

### **Select (Sel)**

Enter one of the following:

1 - To select a line to be received or to amend receipt details

2 - To maintain lot header details if the item is lot-controlled, batch-controlled or serial-controlled

(This displays the Lot Header Maintenance window.)

### **Date**

This field displays the date of despatch from the From Stockroom. This will cross-reference the [calendar](#) to derive period/week numbers.

### **Order**

This field displays the [distribution order](#) number allocated to the transaction.

### **Order Line**

This field displays the [distribution order](#) line number.

### **Item**

This field displays the item reference code for the item that is in transit.

### **Stockroom**

This field displays the receiving stockroom for the item. The receiving stockroom defaults to the To stockroom as entered on the [distribution order](#).

**Note:** You can override this with any valid stockroom for the item. However, WT restricts overrides to stockrooms that are in the same country.

### **Quantity**

You can specify the actual quantity received. This must not exceed the quantity despatched.

**Note:** If the received quantity is less than the quantity despatched, the received quantity will be booked into stock but the balances will remain in transit. The assumption is that the remainder will be confirmed, via this window, once it is received.

If there are any discrepancies, you must use an Inventory stock adjustment (with an appropriate reason code) after the quantity has been fully received at the receiving stockroom.

### **UoM**

This field displays the unit of measure for the item that is in transit.

### **Lot Number**

If the item is lot-controlled, batch-controlled or serial-controlled, the lot reference number is displayed.

## Consignment

This field displays the Advanced Shipping consignment number, if used.

**Note:** *You must confirm receipt of the entire despatch quantity before it is removed from the in transit list. You can do this across more than one shipment receipt.*

**Note:** *If you use Warehousing, you must enter the appropriate location details before you can complete the receipt.*

The physical and available stock balances are updated by the received quantity and the in transit quantity reduced accordingly. This also updates the batch and FIFO cost records if appropriate.

These receipts are also updated in the Stock History file and Movement file as transfer in quantities. These should match with the corresponding transfer out details added at confirmation of despatch of the [distribution order](#) and the [centre](#).

Select **Update (F8)** to save any details. This submits the batch program to update selected lines. If you are using Warehousing, the Warehousing details are displayed. A [Shipments](#) Received report is produced as part of the batch job, to provide printed proof of [shipments](#) receipts.



### View Schedule for DC [1/STDRE]

You can use this enquiry to view the time-phased plan, by item, created when you last evaluated the DC [demand](#) within a [supply network](#).

The enquiry also provides details of actions suggested by DRP for the item.

### DRP DC Schedule Enquiry Selection Window

To display this window, select the View [Schedule](#) for DC task.

You use this window to select the DC for which you want to display the [schedule](#).

#### **Fields**

##### **Enter DC**

Enter a DC that has periods and stockrooms defined, and is assigned to at least one [network](#).

Alternatively, use the prompt facility to select from the Select DRP DC pop-up.

Press Enter to display the Schedule Enquiry Item or Planner Selection window.

### DRP Schedule Enquiry Item or Planner Selection Window

To display this window, enter a DC or [centre](#) code and then press Enter on the DRP DC [Schedule](#) Enquiry Selection window.

Use this window to define the enquiry, by item, [planner](#) or a range of plan dates. You can only select one criterion for a particular enquiry.

#### **Fields**

Enter one of the following:

##### **Item**

Specify any item code.

Alternatively, use the prompt facility to select from the Select DRP Items for [Centre](#)/DC pop-up.

### **Planner**

Specify any DRP [planner](#) code.

Alternatively, use the prompt facility to select from the Select [Planner](#) pop-up.

### **Date Last Planned Range**

Specify a range of [calendar](#) dates. The enquiry begins at the first item with a last planned date on or after the From date.

**Note:** Leave all the selection fields blank to begin the enquiry at the first valid item.

Press Enter to display the Schedule Summary Enquiry window.

## Schedule Enquiry Summary Window

To display this window, press Enter on the [Schedule](#) Enquiry Item or [Planner](#) Selection window.

This window displays the [supply](#), [demand](#) and requirement quantities for each selected item or time period. This gives an overall picture of the [supply](#) and [demand](#) pattern and indicates where shortfalls of [supply](#) will occur.

The dates displayed are the start dates for each period. All figures are in terms of quantity rather than value. The overdue column includes orders with outstanding [demand](#) or [supply](#). This does not include [forecasts](#).

The system calculates the actual available stock as:

Previous available + [supply](#) - [demand](#)

The net requirement is the difference between [supply](#) and [demand](#):

[Demand](#) + stock level forecast + [safety stock](#) - previous planned available - [supply](#)

If the result is positive, there is a shortfall. If there is sufficient or excess stock, the output is blank.

The system calculates the planned available stock as:

Previous planned available + plan orders - [demand](#)

**Note:** Use Page Up and Page Down to view all the period summaries.

### **Functions**

#### **Detail (F17)**

Use this to display the Item [Supply](#) and [Demand](#) Details window.

#### **Next Item (F19)**

Use this to display the next item.

#### **Next Planner (F20)**

Use this to display the first item for the next [planner](#).

---

**Note:** This is only available if you sequence the enquiry by [planner](#).

Select **Exit (F3)** to leave the task.

## Enquiry Details Window

To display this window, select **Detail (F17)** on the [Schedule](#) Enquiry Summary window.

This displays details of [supply](#) and [demand](#) for a specific item. Details include the required date, order number, quantity and status of both the [supply](#) and the [demand](#). It also displays the action [DRP](#) suggests you should take on this [supply](#) line.

The [demand](#) status can be:

- SO - Sales order line
- SX - Sales order line excluded
- DO - Distribution order line
- DX - Distribution order line excluded
- FC - Sales forecast
- FX - Sales forecast excluded

**Note:** This excludes order lines if the forecast is greater than the [demand](#) and vice-versa. There are no exclusions if you use consumption of forecast.

The [Supply](#) Status can be:

- SP - Suggested purchase order line
- CP - Confirmed purchase order line
- SD - Suggested distribution order line
- DO - Distribution order line
- TI - In transit
- GI - Received at goods inwards
- IS - Received at inspection
- UP - Unconfirmed purchase order line
- FS - Stock level forecast

The action suggested by [DRP](#) can be:

- SP - Suggested purchase order line
- SD - Suggested distribution order line
- RI - Reschedule in (Expedite)
- RO - Reschedule out (Defer)

CQ - Change quantity

CA - Cancel order line

RICQ - Reschedule in and change quantity

ROCQ - Reschedule out and change quantity

**Note:** You can use Page Up and Page Down to move through the [supply](#) and [demand](#) details.

## **Functions**

### **Summary (F17)**

Use this to display the [Schedule](#) Enquiry Summary window.

### **Header Details (F18)**

Use this to display the Item Header Details pop-up.

### **Next Item (F19)**

Use this to display the next item on the [Schedule](#) Enquiry Summary window.

### **Next Planner (F20)**

Use this to display the first item for the next [planner](#) on the [Schedule](#) Enquiry Summary window.

**Note:** This is only available if you sequence the enquiry by [planner](#).

### **Detail Line (F22)**

Use this to display the action details for this item. Extra columns are displayed to the right showing dates etc.

Select **Exit (F3)** to leave the task.

## Header Details Pop-up

To display this pop-up, select **Header Details (F18)** on the [Schedule](#) Enquiry Detail window.

Use this pop-up to view the basic information about the item. The details include the [planner](#), unit of measure, [order policy](#), supplier, stock levels, lead-time, and order quantities.

Select **Previous (F12)** to re-display the [Schedule](#) Enquiry Detail window.

## View Schedule for Centre [2/STDRE]

You use this enquiry to view the time-phased plan, per item, created when you last evaluated the [centre](#) within DRP.

This enquiry also provides details of actions suggested by DRP for the item.

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## DRP Centre Schedule Enquiry Selection Window

To display this window, select the View [Schedule](#) for [Centre](#) task.

You use this window to specify the [centre](#) for which you want to view the [schedule](#).

### **Fields**

#### **Enter Centre**

Enter a [centre](#) code that has periods and stockrooms defined and is defined as a [centre](#) within at least one [network](#).

Alternatively, use the prompt facility to select from the Select DRP [Centre](#) pop-up.

Press Enter to display the DRP [Schedule](#) for [Centre](#) Enquiry Item [Planner](#) Selection window. For further information, see the DRP [Schedule](#) Enquiry Item or [Planner](#) Selection Window section, as this window works in exactly the same way.

## Distribution Item Master [3/STDRE]

You use this enquiry to view the fixed DRP details for a selected item, held on the [distribution item](#) master, for a [centre](#) or DC.

These are the parameters controlling how you plan the item and where to source from as a default.

## Distribution Item Master Enquiry Selection Window

To display this window, select the [Distribution Item](#) Master task.

You use this window to enter the [centre](#) or DC and item for enquiry.

### **Fields**

#### **Centre/DC**

Enter a [centre](#) or DC with periods and stockrooms defined.

Alternatively, use the prompt facility to select from the Select DRP [Centre](#)/DC pop-up.

#### **Item**

Enter an item defined to the Inventory Management and DRP modules.

Alternatively, use the prompt facility to select from the Select DRP Items for [Centre](#)/DC pop-up.

### **Functions**

#### **Inventory Item Search (F16)**

Use this to search on all Inventory items.

Press Enter to display the [Distribution Item](#) Master Enquiry Item Details window.

## Distribution Item Master Enquiry Item Details Window

To display this window, enter a [centre](#) or DC and an item code and then press Enter on the [Distribution Item](#) Master Enquiry Selection window.

This window shows details of the [Distribution Item](#) Master Enquiry, including [supply](#) source, [planner](#), forecast details, [order policy](#) codes, order quantity details, stock levels, and stockrooms. You cannot change any of the information here; it is for enquiry only.

Select **Previous (F12)** to select another item or select **Exit (F3)** to leave the enquiry.

## Stock In-transit [11/STDRE]

You can use this enquiry to view [distribution order](#) lines in-transit between two selected stockrooms.

Items in transit have been confirmed despatched from the From stockroom (via Sales Order Processing, Warehousing, or DRP), but have not yet been received at the To stockroom (via Distribution Requirements Planning).

## Shipments In-transit Enquiry Selection Window

To display this window, select the Stock In-transit task.

Use this window to select the [distribution order](#) lines on which you want to enquire. You can select all distribution lines in transit between two stockrooms or display one specific [distribution order](#).

### **Fields**

#### **From Stockroom**

Enter an Inventory stockroom defined as a Sales Order Processing depot and defined to a DC or [centre](#) within DRP.

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

#### **To Stockroom**

Enter an Inventory stockroom defined as a Sales Order Processing depot and defined to a DC or [centre](#) within DRP.

Alternatively, use the prompt facility to select from the Stockroom Selection pop-up.

### Distribution Order Number

You can optionally enter a [distribution order](#) number, confirmed as despatched at the From stockroom and not confirmed as received at the To stockroom. Leave this field blank to display all stock in transit between the two stockrooms.

**Note:** You can enter an order number without specifying From and To stockrooms.

Press Enter to display the [Shipments](#) In-transit Enquiry Order Line Details window.

## Shipments In-transit Enquiry Order Line Details Window

To display this window, enter the required details and press Enter on the [Shipments](#) In-transit Enquiry window.

This window displays the [distribution order](#) line details. These details include:

- Originating and destination stockroom and DC or centres
- Due date
- Distribution order number and line number
- Inventory item code
- Local stockroom at the DC
- Despatched quantity and unit of measure
- Lot number, if the item is batch-controlled, lot-controlled or serial-controlled

### Functions

#### Show/Hide Description (F11)

Use this to toggle the display to show the item description. This is shown in an extra column to the right of the screen (not shown above).

**Note:** Where appropriate, you can amend the stockroom, pack type, lot number and rotation date when you confirm receipt.

**Note:** Use Page Up and Page Down to display more order lines.

Select **Exit (F3)** to leave the enquiry.



### Introduction

You can enter selection and sequencing parameters before running any of the reports.

Standard reports print on standard listing paper with 132 print positions and 6 lines to the inch. The reports print the procedure or program number on the top left and the page number on the top right of the report.

**Note:** The [schedule](#) and [valuation](#) reports both have 198 print positions.

As with the enquiries, you can group the reports into Planning, Static Information and Status.

### DRP Run Details [1/STDRR]

This report outputs the control details of the last processing run for a selected [centre](#) or [network](#).

The output consists of run parameters and period details.

#### Frequency

For each [network](#), and for each [centre](#), this report is included automatically in a processing run. You can also request reprints.

### DRP Run Details Report Selection Window

To display this window, select the DRP Run Details task.

You use this window to select the [centre](#) or [network](#) for the DRP Run Details report.

#### Fields

Enter either a [centre](#) or a [network](#).

##### Centre

Enter a [centre](#) code to print details of last DRP run for this [centre](#).

Alternatively, use the prompt facility to select from the Select DRP [Centre](#) pop-up.

### **Network**

Enter a [network](#) code to print details of the last DRP run for the [network](#) specified.

Alternatively, use the prompt facility to select from the Select DRP [Networks](#) pop-up.

Select **Print Run Details Report (F8)** to print the report.

## DRP Schedule [2/STDRR]

This report produces a time-phased plan, or [schedule](#), for controlling item stock levels within the selected [centre](#) or DC. You can select a range of dates and the level of detail required in your report.

It is a printed version of the details that you can view, per item, using the [Schedule](#) Enquiries.

Refer to the View [Schedule](#) for DC section in the Enquiries chapter for a detailed content description.

## Request Schedule Report Selection Window

To display this window, select the DRP [Schedule](#) task.

You use this window to select the [centre](#) or DC for which to produce the [Schedule](#) report.

### **Fields**

#### **Centre/DC**

Enter a DRP [centre](#) or DC.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

Press Enter to display the Request [Schedule](#) Report Details window.

## Request Schedule Report Details Window

To display this window, enter or select a [centre](#) or DC and then press Enter on the Request [Schedule](#) Report Selection window.

You use this window to select a range of plan dates and the level of detail you require for the report.

### **Fields**

#### **Date Last Planned From/To**

Specify a range of plan dates to include in the report. Only items last planned within this range of dates appear on the report. These fields default to the date of the last planning run for the [centre](#) or DC.

**Print Supply/Demand Detail**

Use this checkbox as follows:

Unchecked - To display totals only

Checked - To include details of the [supply](#) and [demand](#) orders

**Print Items with No Details**

Use this checkbox as follows:

Unchecked - To exclude the codes and description of items with no [supply](#) or [demand](#) details

Checked - To include codes with no [supply](#) or [demand](#) details

**Functions****Additional Selection (F14)**

Use this to maintain additional selection and sequencing criteria for the report on the Enter Selection Criteria pop-up.

Select **Submit Report (F8)** to submit a batch job to produce the report.

## Enter Selection Criteria Pop-up

To display this window, select **Additional Selection (F14)** on the Request [Schedule](#) Report Details window.

Alternatively, select **Additional Selection (F14)** on the Request [Planner](#) Action Report Details window.

You use this pop-up to specify additional select and sequencing information for the report.

**Rules for Range Selection**

Leave the From and To fields blank to select all items.

If you enter a value in the From field and leave the To field blank, the To field defaults to value of the From field.

If you enter a value in a To field, you must enter a value in the corresponding From field.

The value in a To field must not be less than the value in the corresponding From field.

**Fields****Sequence**

Select the order in which the selection criteria are to appear on the report. You can select up to three sequencing criteria.

If you do not enter a sequence, the report sequences by item.

**Item From/To**

You can optionally enter a range of items to select for the report.

Alternatively, use the prompt facility to select from the Select DRP Items for [Centre/DC](#) pop-up.

#### **Planner From/To**

You can optionally enter a range of DRP [planners](#). Only items defined to DRP [planners](#) within this range are included in the report.

Alternatively, use the prompt facility to select from the Select [Planner](#) pop-up.

#### **Item Group From/To**

You can optionally enter a range of Inventory minor item groups. This only selects those items defined to Inventory minor items groups within this range.

Alternatively, use the prompt facility to select from the PGMN Product Group - Minor pop-up.

#### **Value/Usage Class From/To**

You can optionally enter a range of Inventory value or usage classes. These are defined in the Inventory company profile on the ABC classification table for each stockroom.

Only items within the entered range will be selected.

#### **Preferred Supplier From/To**

**Note:** *You define preferred suppliers in the item/stockroom profile, within the Stockroom Detail task in Inventory Management.*

You can optionally enter a range of preferred suppliers. This only selects those items with preferred suppliers within this range.

Alternatively, use the prompt facility to select from the pop-up.

Press Enter to confirm your selections and return to the previous window.

## Planner Actions [3/STDRR]

You use this task to print the suggested actions for the [planner](#), resulting from processing runs for the selected [centre](#) or DC.

These actions include:

- Re-order suggestions
- Order amendments - quantities or due dates, or both
- Order cancellations

**Note:** *Orders are purchase orders for items supplied externally to the company and [distribution orders](#) for items supplied by [centres](#) within the company.*

---

## Request Planner Action Report Selection Window

To display this window, select the [Planner Actions](#) task.

You use this window to specify the [centre](#) or DC you want the [planner](#) action report to cover.

### **Fields**

#### **Centre/DC**

Enter a DRP [centre](#) or DC.

Alternatively, use the prompt facility to select from the Select DRP [Centre](#)/DC pop-up.

Press Enter to display the Request [Planner](#) Action Report Detail window.

## Request Planner Action Report Detail Window

To display this window, enter or select a [centre](#) or DC and then press Enter on the Request [Planner](#) Action Report Selection window.

You use this window to select a range of dates for [planner actions](#) and specify whether to include or exclude overdue orders.

### **Fields**

#### **Planner Action Start From/To**

Specify a range of plan dates to include in the report. Only items last planned within this range of dates show on the report. These fields default to the date of the last planning run for the selected [centre](#) or DC.

#### **Include Overdue Orders**

Use this checkbox as follows:

Unchecked - To exclude all overdue orders

Checked - To include all overdue orders

### **Functions**

#### **Additional Selection (F14)**

Use this to maintain additional selection and sequencing criteria for the report. More information on this function can be found in the Enter Selection Criteria Pop-up section (under DRP [Schedule](#) (2/STDRR)).

Select **Submit Report (F8)** to submit the report.

## Valuation [4/STDRR]

You use this task to produce a time-phased costing for the plan produced for a selected [centre](#) or DC.

### Request Valuation Report Selection Window

To display this window, select the [Valuation](#) task.

You use this window to specify the criteria for the [valuation](#) report.

#### **Fields**

##### **Centre/DC**

Enter a DRP [centre](#) or DC.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

##### **Supply Source**

Select one of the following:

Locally purchased items only (1) - To include only those items not supplied by a DRP [supply centre](#) i.e., locally purchased items

Centrally supplied items only (2) - To include only those items supplied from a DRP [supply centre](#) to the selected [centre](#) or DC i.e., centrally supplied items

All items (3) - To include both centrally supplied and locally purchased items

##### **Level of Detail Required**

Select one of the following:

Summary only (1) - To display a summary costing only

The totals for each included item are summed for the [centre](#) or DC.

Full detail (2) - To display individual costing details for each included item

##### **Costing Method**

Select one of the following:

Standard cost (1) - To use the standard cost at the Inventory stockroom assigned to the item at the selected [centre](#) or DC

Latest cost (2) - To use the latest (current) cost of the item at the Inventory stockroom assigned to the item at the selected [centre](#) or DC

##### **Factor**

Select one of the following:

One thousands (1) - To display costings in units of one thousand

Ten thousands (2) - To display costings in units of ten thousand

Hundred thousands (3) - To display costings in units of one hundred thousand

Millions (4) - To display costings in units of one million

Select **Submit Report (F8)** to submit the report.

## Distribution Item Master [5/STDRR]

You use this task to print DRP [Distribution Item](#) Master file information for a range of items within the [centre](#) or DC.

### Distribution Item Master Report Selection Window

To display this window, select the [Distribution Item](#) Master task.

You use this window to enter the selection details for the [Distribution Item](#) Master report.

#### Fields

##### **Centre/DC**

Enter a [centre](#) or DC.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

##### **Select**

Enter a range of item codes defined to this [centre](#) or DC.

Alternatively, use the prompt facility to select from the Select DRP Items for [Centre/DC](#) pop-up.

Enter values in both the From and To fields to only include items within this range.

If you only enter a value in the From field, the report runs for the item specified only.

If you leave both fields blank, the report includes all items defined to this DC or [centre](#).

Select **Submit Report (F8)** to submit the report.

## Supplier Schedule [6/STDRR]

You use this task to produce a supplier [schedule](#), either weekly or each period or both. You can specify the following:

- A range of Purchase Management suppliers

- A range of minor item groups
- A range of DRP supply and distribution centres
- The start date for the report
- If the report produces weekly schedules, periodic schedules or both
- Whether you sequence the report by item, within minor item group within supplier, or item within supplier, irrespective of minor item group

**Note:** The period report is a summary of the supplier [schedule](#) showing only total quantities per item per period.

**Note:** The weekly report also provides specific details of the purchase orders, requisitions and suggestions behind these total quantities (for the fixed part of the [schedule](#)).

## Supplier Schedule Report Selection Window

To display this window, select the Supplier [Schedule](#) task.

You use this window to enter the selection details for the Supplier [Schedule](#) report.

### Rules for Range Selection

Leave the From and To fields blank to select all items.

If you enter a value in the From field and leave the To field blank, the To field defaults to the value in the From field.

If you enter a value in a To field, you must enter a value in the corresponding From field.

The value in a To field must not be less than the value in the corresponding From field.

## **Fields**

### **Supplier**

You can optionally enter a range of suppliers. These do not need to be valid codes; the system selects the next or previous valid code.

Alternatively, use the prompt facility to select from the Supplier Search pop-up.

**Note:** *Supplier details only print on the report if you have entered supplier [schedule](#) details for that supplier in the Supplier [Schedule](#) Profile task.*

### **Minor Item Group**

You can optionally enter a range of minor item groups. These do not need to be valid codes; the software selects the next or previous valid code.

Alternatively, use the prompt facility to select from the PGMN Product Group - Minor pop-up.

### **Centre/DC**

You can optionally enter a range of DRP [centres](#) or DCs. These do not need to be valid codes; the software selects the next or previous valid code.

Alternatively, use the prompt facility to select from the Select DRP [Centre/DC](#) pop-up.

### **Start Date**

Specify the date from which to show supplier [schedule](#) details on the report. This defaults to the Monday before the current date on the software. On the weekly report, any [supply](#) due before the start date appears in the Past Due Date column. The Period report does not show [supply](#) due before the report start date.

You must ensure that you define the default DRP [calendar](#) for the company for all the time periods that are to appear on the report.

**Note:** *Please note that the period report can range over three [calendar](#) years.*

### **Weekly/Period Report**

Select one of the following:

Weekly (1) - To produce a weekly report

Period (2) - To produce a period report

Both (3) - To produce both weekly and period reports

### **Report Sequencing**

Select one of the following:

Minor Item Group (1) - To sequence the report by item, within minor item group, within supplier

There is a page break when there is an overflow, change of minor item group, or change of supplier. The report uses the formats defined at minor item group level. When items do not have a defined minor item group or supplier/minor item group combination, the report uses supplier level formats.

Item (2) - To sequence the report by item within supplier

There is a page break when there is an overflow or change of supplier. The system ignores the minor item group and the report uses the format specified in the supplier definition within DRP supplier [schedule](#) maintenance.

Select **Submit (F8)** to submit the report for printing.

### Maintain Company Profile [1/STDRU]

You use this task to define new companies to DRP and to maintain existing companies. The company code must correspond to the code defined to Inventory Management for this company.

**Note:** You maintain period details in this company profile. You must review these before you create a new [calendar](#) year using the [Calendars](#) task.

#### Maintain Profile Records Window

To display this window, select the Maintain Company Profile task.

Use this window to enter the company for which you want to maintain details, or enter a new company code to create a new DRP company.

##### **Fields**

###### **Enter New Company**

Enter a unique code for a new company.

**Note:** This code must not already exist in DRP. However, it should exist in Inventory Management.

##### **Options**

###### **Select**

Use this to select the company to maintain.

Select a company, or enter a new company code and then press Enter to display the Maintain DRP Company Profile window.

#### Maintain DRP Company Profile Window

To display the Maintain DRP Company Profile window, select a company or enter a new company code and then press Enter on the Maintain Profile Records window.

You use this window to specify the company defaults, including the way in which you consume [forecasts](#) by actual [demand](#) and the maximum number of lines on a [distribution order](#).

## **Fields**

### **Consume Forecast**

Select one of the following:

No (0) - If forecast consumption is not used

[Demand](#) for a particular period is the greater of the forecast or actual sales for that period.

Run Level (1) - To use consumption of forecast with no period control

The software bases [demand](#) for a particular period on cumulative consumption of forecast and actual [demand](#), without reference to period ends, between the start and end dates specified for a DRP run (see Example 1).

Week Level (2) - To use consumption of forecast by week

The software bases [demand](#) on cumulative consumption of forecast and actual [demand](#) within each week defined in the [calendar](#) for the DC or [Centre](#). At week ends the system re-sets accumulations to zero.

Period Level (3) - To use consumption of forecast by period

The software bases the forecast on cumulative consumption of forecast and actual [demand](#) within each period defined in the [calendar](#) for DC or [Centre](#). At period ends the system re-sets accumulations to zero (see Example 2).

### **Example 1: Consumption Method 1 (No period control)**

FTD - Accumulated Forecast to Date

ASD - Accumulated Actual Sales to Date

DTD - [Demand](#) to Date (greater of FTD and ASD)

CD - Consumed [Demand](#) (DTD for period less DTD for previous period)

**Example 2: Consumption Method 3 (Period)**

Period	Week	F'Cast	Sales	FTD	ASD	DTD	CD
1	1	10	0	10	0	10	10
1	2	10	25	20	25	25	15
1	3	15	40	35	65	65	40
1	4	15	4	50	70	70	5
2	5	20	7	20	7	20	20
2	6	20	25	40	32	40	20
2	7	20	0	60	32	60	20
2	8	20	8	80	40	80	20
3	9	15	15	15	15	15	15
3	10	15	8	30	23	30	15
3	11	15	35	45	58	58	28
3	12	15	45	60	103	103	45

The same principle of calculation applies for Consumption Method 2 (by week).

Period	Week	F'Cast	Sales	FTD	ASD	DTD	CD
1	1	10	0	10	0	10	10
1	2	10	25	20	25	25	15
1	3	15	40	35	65	65	40
1	4	15	4	50	70	70	5
2	5	20	7	70	77	77	7
2	6	20	25	90	102	102	25
2	7	20	0	110	102	110	8
2	8	20	8	130	110	130	20
3	9	15	15	145	125	145	15
3	10	15	8	160	133	160	15
3	11	15	35	175	168	175	15
3	12	15	45	190	213	213	38

**Lines per Distribution Order**

Enter the maximum number of lines you want on any [distribution order](#). You can enter any number in the range 0 to 999.

**Calc. Safety Stock**

Use this checkbox as follows:

Unchecked - Not to calculate [safety stock](#) during DRP processing

The software uses the fixed [safety stocks](#) maintained at item or DC level.

Checked - To calculate variable [safety stock](#)

The software calculates the [safety stock](#) based on sales [forecasts](#) and the minimum [safety stock](#) cover (weeks and days) specified.

**Forecast Error Tolerance % Absolute**

Specify the default percentage by which sales forecast quantities and actual sales quantities can differ. The software uses this percentage if you do not enter a tolerance at item level.

**Safety Stock Weeks/Safety Stock Days**

If you want to calculate [safety stock](#), enter the minimum cover required, in weeks and days. You can override this at item or DC level or at DRP run time.

The software calculates the sales forecast for the specified time and uses this as the [safety stock](#) quantity. However, it excludes the forecast in the current column, as the calculation of [demand](#) includes this.

The system does not calculate [safety stocks](#) at daily level.

**Include Quotations Percentage**

Specify a percentage of the quantities of sales quotations, set up in Advanced Order Entry, to be included as [demand](#) in the DRP processing runs.

For example:

100% = Include full quantities of all quotations.

20% = Assume [demand](#) to be 20% of quantities of all quotations.

0% = Exclude all quotations from DRP [demand](#).

**Period Forecasts**

Use this checkbox as follows:

Unchecked - Not to calculate period [forecasts](#)

Checked - To calculate period [forecasts](#)

You can then maintain both seasonal profiles at period level and item group or item level period [forecasts](#), or both.

## Calendar Parameters

### Calendar Code

Enter the default [calendar](#) code for the company. Any DC or [centre](#) without a [calendar](#) code assigned to it via Period Maintenance uses this [calendar](#) (defined via [Calendar](#) Maintenance).

### Number of Periods per Year

Enter the number of periods per year, in the range 1 to 13 inclusive.

### Period Name

Enter a description for each period, up to the number of periods specified.

### Days

Enter the number of days for each period.

### Standard Week Template

Enter **N** against non-working days in your normal working week. Leave the field blank for working days.

For example: 2004 Period 12:

Set the number of days to 32. This ensures that the year ends on a Sunday (01/01/05) rather than a Saturday (31/12/04). The total number of days in the year is then 364.

This is necessary because you maintain [forecasts](#) on a weekly basis, with the week always beginning on a Monday.

**Note:** *The total number of days must equal 364 or 371. In addition, you must make sure that the next year starts on a Monday.*

Press Enter to update the Company Profile record and re-display the Maintain Profile Records window.

## Copy Company [2/STDRU]

You use this task to copy the data relating to one company across libraries and companies. You can therefore create backup libraries and create or update company data from a master company.

## Copy Company Select Libraries Window

To display this window, select the Copy Company task.

You use this window to enter details for the Copy Company Select Libraries facility.

### Fields

**Library to Copy From**

Enter the name of the library that holds the source DRP data. This defaults to the standard DRP files library.

Alternatively, use the prompt facility to select from the Select Library pop-up.

**Library to Copy To**

Enter the name of the library to which to copy the source DRP data.

**Regenerate File List**

Use this checkbox as follows:

Unchecked - Not to regenerate the file list

Checked - To regenerate the file list

**Company Number Field Default Start Position on Files**

Enter the default start position of the company code.

Press Enter to display the Copy/Replace Company Details window.

## Copy/Replace Company Details Window

To display this window, complete the fields and then press Enter on the Copy Company Select Libraries window.

Use this window to select the company details you want to copy or replace.

**Fields****Output Library**

Enter the name of the library to which you want to copy the details.

**Copy from Company**

Enter the company code from which you want to copy the company master data. You must have defined the company code to Application Manager.

**Copy to Company**

Enter the company code to which you want to copy the company master data. You must have defined the company code to Application Manager.

**Options****Replace**

Use this to replace a file in the target library.

**Add**

Use this to add a file to the target library.

**Delete Company**

Use this to delete records belonging to the From company.

**Change Company Number Start Position**

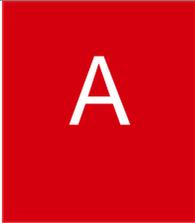
Use this to change the company start position.

Select **Update (F8)** to update the database.



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# Appendix A Glossary

A**Calendar**

To generate a [calendar](#), you specify the start date, holidays, and non-working days.

**Centre**

A central distribution point, [supplying](#) one or more DCs within the company

**Central Stockroom**

The inventory stockroom, defined at the [Centre](#), that normally supplies the Item

**Customer**

The [customer](#) code allocated to a stockroom within Distribution Requirements Planning

**Distribution Centre or DC**

A regional distribution or retail outlet for the company

**Demand**

The outstanding sales and [distribution orders](#) and sales [forecasts](#) against an item

**Distribution Item**

A valid inventory item that has been defined to DRP

**Distribution Order**

An internal sales order placed on a [centre](#) to meet the [demand](#) of one of the DCs it supplies (a formal request to transfer stock)

**Forecasts**

A sales forecast is the anticipated value, or quantity, to be sold within a given period. A stock forecast is the required level of stock to be planned as being available within a given period, that is as part of a stock build action (typically to meet a seasonal [demand](#) with a potential lack of supplier capacity).

**Forecast/Seasonal Profiles**

These are time-phased spread patterns that can be applied to item group and item sales [forecasts](#) or stock building requirements to break them down by period, week and day.

**Item Master**

Details for each item which are specific to its control within DRP

**Local Stockroom**

The primary inventory stockroom for the item at the [centre](#) or DC (where it is normally stocked)

**Network**

The relationship between a [centre](#) and all the DCs it can [supply](#)

**Overdue Days**

The number of [calendar](#) days prior to the current date for which DRP considers overdue orders in the planning runs

**Order Policy**

This defines how an item is to be replenished when a [supply](#) requirement has been identified.

**Pack Type Code**

This is the code for the pack in which the item is being despatched, from a [Centre](#) to a DC. This code applies to System21 Warehousing.

**Planner**

The person responsible for controlling the [supply](#) of a number of items within DRP

**Planner Actions**

Actions suggested by DRP to be taken against [supply](#) orders (in attempting to match [supply](#) to [demand](#))

**Safety Stock**

The fixed level of stock you plan to be permanently available

**Safety Stock Weeks and Days Cover**

This is the level of [safety stock](#) cover calculated during DRP, expressed in terms of weeks and days [demand](#). It is calculated from the sales forecast, at item level.

**Schedule**

The time-phased plan generated by DRP for each item showing [supply](#), [demand](#) and suggested actions

**Selective Actioning**

A method of planning by which a range of DRP items, DRP [planners](#), inventory minor item groups, inventory cost/usage elements and/or preferred suppliers are used to select certain DRP items for re-planning

**Shipments**

Items in-transit between [supply centres](#) and DCs, confirmed as despatched from the [centre](#) but not confirmed as fully received at the DC

**Supply**

The stock of an item to be replenished: purchase order lines, [distribution order](#) lines and stock in-transit to a DC

**Time Fence Days**

The number of [calendar](#) days, from the current date, for which DRP freezes the [schedule](#) (does not suggest any new [supply](#) orders)

**Valuation**

An assessment of the cost involved in following the [supply](#) suggestions shown on the [schedule](#)

**Week Templates**

A representation of the working and non-working days in a week, that is Monday to Sunday (these are associated with a range of dates)