



XA - Materials Planning Release Notes

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Publication Information

Release: XA 10

Publication date: August, 2021

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Materials Planning

The Materials Planning functions enable you to establish planning horizon dates, set date intervals for consolidating requirements, establish planning run execution and report options, and initiate a planning run from the Warehouses object.

Requirements

To be configured to use Materials Planning, an XA environment must meet these requirements.

- Infor10 ERP Discrete iEnterprise (XA) Release 9.1
- Infor10 ERP Discrete iEnterprise (XA) Client PTF 02.09.00.03.13 or higher
- PTF SH49406
- License for Application feature code 5148 (to install MP)
- IM, MM, and EPDM or PDM installed

In addition, Materials Planning must be installed for the XA environment. In Link Manager, select the XA environment in the Applications object. Select the Applications card for that environment. Select Materials Planning and click **Maintain > Change**. On the Change Installed Applications dialog, select **Installed** and click **Update**.

These Planning Run host job options are available when:

Planning Run host job option	Application
Extract independent demand	CSM is installed. If EC is installed, expected customer orders are netted against the actual customer orders and the remaining quantities also are included.
Transfer MPSP orders	MPSP is installed.
Auto-release manufacturing orders	MRP is interfacing to IM.
Auto-release purchase orders	Purchasing is installed.

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Auto-release intersite orders	ISL and MISL is installed.
Auto-reschedule manufacturing orders	MRP is interfacing to IM.
Auto-reschedule purchase orders	Purchasing is installed.
Auto-reschedule schedules	REP is installed.

You must have authorization to the Materials Planning functions you want to use. To make changes to the Warehouses Planning card, you must have Materials Planning field security. To run the Planning Run host job, you must have authorization to the host job. See the *Cross Application Support User's Guide* for information.

Warehouses Planning card

The new Planning card is maintainable when Materials Planning (MP) is installed and the warehouse is a planning warehouse. This card is blank when MP is not installed.

The screenshot shows the 'Warehouses Planning card' for warehouse 'DT2 REP 2ND CONT/PLANNED WHS'. The 'Planning' tab is selected. The 'Execution Options' section contains the following settings:

Combine customer backlog orders	No	Minimum days to reschedule orders	0	Warehouse reschedule	Cannot auto reschedule	Cancel exception	Do not reschedule
Time-phased allocations	Yes	Rescheduling frozen zone	0	Due in past - M.O.	Do not reschedule	Contract for auto release	Required
Level to plan master level items	2	Maximum demand sources to track	0	Due in past - P.O.	Do not reschedule	Extract requisitions	(blank)
Clear quantity sold with extract	No	Track demand for quantity on hand	No	Due in past - Schedule	Do not reschedule	Safety stock lead time	(blank)

The 'Reporting' section includes:

Requirements planning	No	MU requirements vs forecast customer orders	No	Horizon Values	
Items selected	All items	Purchase planning	No	Current date	10/03/1996
Items to include	All controlled by MRP	Order recommendation by item	No	Overdue days	15
Date interval	Full Detail	Order recommendation by exception	No	Release days	5
Order exception days	0	Reschedule activity	No	Allocation days	25
				Review days	20
				Horizon start	09/12/1996
				Release	10/10/1996
				Allocation	11/07/1996
				Review	10/31/1996

The 'Combine Interval Days' section shows:

Interval 1	10	Interval 3	22
Interval 2	15	Intervals 4 thru 9	5

The 'Price Break Literals' section shows:

Literal 5	(blank)	Literal 8	(blank)
Literal 6	(blank)	Literal 9	(blank)
Literal 7	(blank)		

The bottom section displays 'Report Code 1 Period Intervals', 'Report Code 2 Period Intervals', and 'Report Code 3 Period Intervals' with a grid of values. Each report code has a grid with 15 columns and 3 rows of values, all of which are '(blank)'. The 'Continue' and 'Help' buttons are visible at the bottom.

You should review the options on the Planning card before you initiate the planning run using the Planning Run host job.

Specify how the planning run will run. For example, should customer backlog orders be combined? Should you allow time phased allocations? At what level will you plan master level items? How do you want rescheduling orders to be handled? Should contracts for auto-release be required?

Specify the reports you want to print automatically when a planning run is executed.

- Requirements planning
- MLI requirements vs forecast customer orders
- Purchase planning
- Order recommendation by item
- Order recommendation by exception

If you specify to print the Requirements planning report, you can also specify the types of items, the level of details for the items, and date intervals for the items on the report.

Specify planning horizon values and dates used in the planning run. Use the Horizon Values section to specify a new current date and new displacements (days). For convenience in changing the planning horizons as time passes, displacements, or intervals, occur between four of the dates: Start, Current, Release, and Review. You should only change planning dates immediately before a planning run, because between runs they are used on reports and displays and should correspond with the data they accompany. Because the data represents the last planning run, the dates should also represent the last planning run.

Specify the number of days for the combine codes. The Combine requirements code (1-9) in the Item Planning object identifies which of these combine interval codes is used during planning to determine time intervals for combining requirements for the item for planning orders.

Specify the unit of measure that will be used as the price break literal value for price breaks from the vendor for combine codes.

Specify the number of days for period intervals. The Requirements Planning Report shows total quantities of requirements and planned orders in these period intervals.

Planning Run host job

The planning run examines the balance of each inventory item, starting with end-items. On any date where requirements exceed the projected available on-hand, a planned order is created for the quantity required to satisfy the net required quantity and other order sizing requirements for the item. Therefore, the plan that is created is basically a collection of the requirements and the resulting planned orders for items that should be replenished. The planned orders are a tentative production and purchasing schedule.

You initiate the planning run using the new Planning Run host job. When you submit a Planning run, you can specify to:

- Extract customer demand including released intersite orders and expected customer orders from the respective databases for informational and planning purposes.
- Transfer the new master schedule (planned and firm planned orders) from MPSP to MRP.
- Auto-release manufacturing orders, purchase orders, and intersite orders.
- Auto-reschedule manufacturing orders, purchase orders, and REP production schedules.

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- Run all items planned by MRP or only items planned by MRP that have had activity since the last planning run.
- Run only the bill of material levels you requested during planning run execution options or only bill of material levels you requested during planning run execution options that have had activity since the last planning run.

(TT) Warehouse Host Jobs

Warehouse

Audit Allocation Quantities

Audit Location Quantities

Audit On-order Quantities

Cycle Count

Generate Reorder Recommendations

Physical Inventory

Planning Run

Publish

Content Confirmation

Execute

Description

Subset ... (selected record)

Sort ... (default)

Options

Extract independent demand Yes No

Transfer MPSP orders Yes No

Auto-release manufacturing orders Yes No

Auto-release purchase orders Yes No

Auto-release intersite orders Yes No

Auto-reschedule manufacturing orders Yes No

Auto-reschedule purchase orders Yes No

Auto-reschedule schedules Yes No

Planning run type Full planning run - Generation

Start date / /

Start time

Submit Cancel Help

Warehouses General card

A new Assign planning defaults button sets warehouse values back to their default value or clears planning warehouse values. Specify Yes for the Planning warehouse attribute and click the Assign planning defaults button to set default warehouse values. Specify No for the Planning warehouse attribute and click the Assign planning defaults button to clear planning warehouse values. Values are updated when you click Update.