Infor XA – Manufacturing
Performance Analysis User's Guide

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To the reader

This book contains the information you need to understand and run this application. The information in this book applies only to MAPICS XA.

For a complete list of the books in the MAPICS XA library, see the bibliography on the MAPICS XA documentation CD.

Before you begin

If you are not familiar with the AS/400, please complete the AS/400 system education for the basic operating concepts of the AS/400 system.

What this book contains

Chapters 1 and 2 acquaint you with the application. Be sure to read the first two chapters before you use the instructions in the remaining sections. Use these chapters to understand how this application works and what you need to know to manage it.

The next group of chapters describes the options on the Main Menu. For example, Chapter 3 contains information about option 1 of the Main Menu. Each chapter includes information about how to use the displays associated with each option.

Use the appendixes to find a sample form for Measurement Master defaults and security for your application.

Summary of changes

The following changes have been made to this application:

If EPDM is installed and activated, MPM 7,12, and 13 are disabled. MPA File Maintenance option 4, Work Center Performance, is also disabled. Notes are in place to remind you. Revision bars mark minor changes

When EPDM is installed, the Manufacturing Performance Analysis application is now fully integrated with the EPDM functions and Item Revisions replaces Item Master. While this guide might contain references to Item Master files, the functions in this application now use Item Revisions for item information. For more information, see the *Enterprise Product Data Management Concepts Guide.*

Contents

Chapter 1. Functional Description

Manufacturing Performance Analysis (MPA) is an application that collects operating performance measurements from the MAPICS XA Manufacturing Applications. These performance measurements provide manufacturing management with a set of vital statistics used to evaluate performance of MAPICS XA manufacturing applications.

Performance Data

Performance data is collected at user-defined regular period intervals to create a performance history data base. This data base is then used to produce performance measurements for manufacturing managers to monitor and evaluate operating performance. These measurements, when taken and reviewed regularly, provide management with an easy to use evaluation tool.

MPA draws data from the control system elements showing factual, up-to-date, and operating statistics for evaluating current performance against company objectives. These performance measurements may be used to identify a company's operating strengths and weaknesses.

Fifteen performance measurements are available on demand for on-line inquiry or printing. MPA presents the measurements in a graphic format that is useful in evaluating current performance in relation to past performance trends. This application gives operating managers the capability to develop performance incentives directly tied to the control system.

In addition to collecting data and calculating performance, MPA also maintains performance trends (measurements). Trend information is critical to a performance measurement system because they identify when performance is increasing or decreasing. The performance measurements are presented in a graphic (bar graphs) format and can be displayed on any of the AS/400 work station terminals.

The measurement period close function collects performance data. This function should be run on a regular basis. The measurement displays show data collected during period close activity. Some measurements have a simulation function that allows you to look at performance during the period without actually closing the performance period, similar to a flash report. You can monitor performance as it is happening, rather than waiting until after the period is over to see what has happened. The simulation function provides information and gives you the opportunity to react to unacceptable performance by making the necessary adjustments to remain in control.

Each measurement is defined in the Measurement Master file. This file contains one record for each performance measurement, with user-controlled parameters unique to that measurement. The most critical data element in this file is the user-defined measurement frequency or period. This element defines to MPA how often the measurement should be taken. Each measurement can have its own frequency. MPA

uses this frequency definition to keep track of measurement update activity and reminds you when to update each measurement. The frequency can be:

- Daily
- Weekly
- Biweekly
- Quadweekly (every four weeks)
- Monthly
- Quarterly.

When a measurement is closed or updated for the first time, MPA sets up the measurement for period close at the right time, and reminds you when it is time to close and update the measurement.

You can use other parameters used to tailor the Measurement Master file:

- Performance targets
- Number of history periods versus forecast periods
- Basis codes indicating the unit of measure shown on the measurement's inquiry displays and reports.

Manufacturing Performance Measurements (MPM)

The following 15 measurements have a specific purpose predefined in the Measurement Master file with a brief description of each measurement's display:

Note: If EPDM is activated, MPM 7, 12, and 13 are disabled.

MPM 1. Customer Order Booking Performance

Purpose: Measure sales (bookings) forecast accuracy by product model.

Description: Actual customer order bookings are compared to the forecasted bookings for each product model. The measurement's bar graph shows the forecast error for up to 26 history periods.

MPM 2. Customer Order Backlog Analysis

Purpose: Measure the level and trend of past due customer orders in the backlog.

The level and value of past due customer orders is compared to the total backlog for each product model.

Description: The level and value of past-due customer orders is compared to the total backlog for each product model. The measurement's bar graph shows the percentage of orders that were not past due (on-time) in units, sales dollars, and profit margin dollars.

MPM 3. Master Schedule Performance

Purpose: Measure actual build performance compared to the Master Production Schedule for each planner code and warehouse and for each period.

Description: Actual production receipts are compared to the planned production for each master schedule item. The measurement shows the performance trend as a bar graph of the percentage of the Master Production Schedule actually produced and received into stock each period.

MPM 4. Shipping Performance

Purpose: Measure the trend and level of on-time shipments for each period.

Description: Actual customer order shipments that were shipped on-time are compared to total customer order shipments. The measurement's bar graph shows the percentage of all on-time shipments. The inquiry displays performance in units, sales dollars, and profit margin dollars.

MPM 5. Inventory Performance Profile

Purpose: Measure planned inventory levels against actual inventory levels.

Description: The projected period end inventory levels for finished goods, manufactured parts, purchased parts, and raw materials is compared to actual

inventory levels. The measurement's bar graph shows the deviation between actual and planned inventory. The measurement displays performance for each inventory category and total inventory.

MPM 6. Inventory Record Accuracy

Purpose: Measure the level of inventory record accuracy for stocked items.

Description: Cycle counting results are tracked and recorded for each audit period (which is usually a week). The measurement's bar graph shows the percentage of item numbers that have accurate inventory balances during the cycle counting audits.

MPM 7. Bill of Materials Record Accuracy

Purpose: Measures how accurately the bill of material records predict the usage of component materials.

Description: The actual component item usage is compared to the bill of material expected usage for all manufacturing orders closed each period. The measurement's bar graph shows the number of orders with accurate bills of materials as a percent of all the orders closed each period. An order has an accurate bill of material if the actual material usage matches the expected usage from the bill of material.

MPM 8. Purchase Commitment Performance

Purpose: Measure actual receipt of purchased inventory items compared to planned receipts in inventory dollars.

Description: Expected purchase receipts (open purchase orders) for each period are compared to actual purchase receipts during the same period. The measurement's bar graph shows the actual purchase receipts, by planner and warehouse for each period as a percent of the purchase commitments.

MPM 9. Order Reschedule Reliability

Purpose: Measure the level of purchase and manufacturing orders past due in a period.

Description: For each planner code and warehouse, the number of orders that are past due is compared to the total number of open orders due by the end of the measurement period. The measurement's bar graph shows the number of non-past due orders as a percent of the open orders due by the end of the period for that planner code and warehouse.

MPM 10. Order Release Reliability

Purpose: Measure the level of orders released on time, i.e., with full planned lead time.

Description: As orders are released on time, the lead time remaining to the order's due date is compared to the item's planned lead time. The measurement's bar graph

shows for each planner code and warehouse the number of orders that were released during each period with sufficient lead time.

MPM 11. Material Availability Performance

Purpose: Measure the achievement of the material plan.

Description: The number of open manufacturing orders with component part shortages is compared to the total number of open orders each period. The measurement shows, by planner code and warehouse, a bar graph of the percentage of the open orders that were not short.

MPM 12. Queue Performance

Purpose: Measure the level and the trend of the waiting work load at each work center.

Description: The current queue hours for each work center is compared to the planned queue from the Production Facility file each period. The measurement shows the difference between current queue and planned queue as a percent of planned queue for each work center.

MPM 13. Output Performance

Purpose: Measure production output performance to planned output.

Description: The actual standard hours earned each period is compared to the production capacity for each production Work Center. The bar graph shows the actual standard hours produced for each work center as a percent of the capacity in hours.

MPM 14. Inventory Turnover Trend

Purpose: Measure the trend of aggregate Inventory investment to support planned production and shipments.

Description: The total inventory level of finished goods is expressed in days of supply to support the planned requirements for finished goods items. The total inventory level of non-finished items is expressed in days of supply to support the Master Production Schedule.

MPM 15. Excess Inventory Analysis

Purpose: Measure the level of available inventory in excess of production demand or shipping needs for n time periods.

Description: Each item's projected usage is compared to the standard value of that item's available inventory. The analysis yields the amount of inventory for each item that is in excess of n periods of usage. The measurement's bar graph shows the trend and excess inventory value by planner code and warehouse in standard dollars.

Functional flow

Each performance measurement contains up to 26 periods of performance history. The data used to update these measurements is extracted from various manufacturing application files during Measurement Period Close. This function must be performed on a regular basis for each of the measurements, so the performance information is consistent period to period. MPA tracks measurement period close activity for each measurement and presents the measurements due for close when you select option 4, Period Close, from the Main Menu.

Measurement Period Close is performed in batch mode. The larger your Item Master, Item Balance, and Open Order files, the longer period close runs. Therefore you should consider scheduling period close to run during a low computer usage time.

You should run Period Close as frequently as you intend to collect performance information. For example, if some measurements are taken weekly, select Period Close at least weekly. You do not have to keep track of when the measurements must be closed. MPA does this and automatically sets up the appropriate measurement(s) for close. After you select option 4, Period Close, from the main menu, agree with the suggested period close schedule as each measurement that is due for close is presented for review. If a measurement is not ready to be closed yet, MPA skips over that measurement and presents the next measurement that is ready for close.

Each measurement has its own closing routine to extract the appropriate details from either the master files or from the transaction history file and then update the appropriate fields in the performance history files. These period close programs are initiated from the Period Close option. During measurement period close, data is extracted from the following files:

- Open Order
- Item Master
- Item Balance
- Production Facility
- Planned Order
- Requirements

When the appropriate data is collected and manipulated, the results are posted to the performance history files in the most recent history period. All history data collected during previous period closes is rolled back one period.

The measurement inquiries should be your source for most performance-related questions or concerns; however, the printed reports provide a periodic documentation of performance history. If, for instance, the measurement has 26 weekly periods of performance history, print out the performance measurement at least twice a year to retain a record of performance beyond the rolling 26 periods that are being maintained.

Even though most of the measurements have monthly or weekly periods of performance, you can see performance as the month or week progresses. You can accomplish this by using Close Simulation, option 3 from the Main Menu. This function is similar to Period Close except that it does not close the current period's performance and it does not produce any performance reports but detail audit reports. Close Simulation only updates the current period's performance and leaves the current period open for further performance update so you can perform other simulations or close the period.

Note: Close Simulation is not available for Queue Performance (MPM 12) or Output Performance (MPM 13) since these measurements use data that is generated during order close and purge in Production Control and Costing. These closes depend on files the system builds during the close out and purge. You cannot close the measurements until you have run close out and purge because Production Control and Costing (PCC) does not analyze work centers until then.

MPA cycle counting enhances and is different from the Inventory Management (IM) cycle counting. It automatically updates the Inventory Record Accuracy (MPM 6) measurement. Use the MPA cycle counting functions if you want to have a record of your performance. MPA gives you the ability to perform multiple counts for an item and see a comparison, book to count, for each count before making any adjustments. You may even choose to leave the balance as is even though the count differs from the balance.

MPA also supports other needed cycle counting enhancements such as the use of control groups. Control groups are representative stockroom sample groups used as indicators for the general population of items in inventory. Items can also be selected for cycle counting based on stock location, negative on-hand balance, control group membership, or count status, (for example, first, second or third count). The cycle count update (Inventory Adjustment) allows you to select the items that should have their inventory record adjusted and on which count to base the adjustment. This feature shows an analysis of the most recent counting activity, and you can choose the adjustment amount that is the most appropriate. When this is done, the physical inventory transaction (PH) is sent to Inventory Management for transaction update.

Control groups are representative sample groups of items that are counted on a regular basis and used as a barometer of the overall level of inventory accuracy. Control group counting is the most effective way to identify record accuracy problems. When you have identified your problems, the control group can be used to see if the problems are indeed corrected by the solutions you implement. You can maintain multiple control groups and count them each independently. The control group items can be selected for second and third counts before making any inventory adjustments. You still have the option to leave the record as is and not make any adjustments no matter what the count is.

The security system for MPA is defined in MAPICS XA Cross Application Support. See Appendix B, “Security areas” on page B-1 for more information. MPA security is divided into the following functional areas:

- Inquiry
- Reports
- Close Simulation
- Period Close
- File Maintenance
- Measurement Master Maintenance
- History Maintenance
- Cycle Count Select, Entry, and Post
- Cycle Count Adjustment.

MPA’s master file maintenance has two levels of security. You can either:

- Change the current information on the maintenance screen but not the performance history period information
- Change the current information on the maintenance screen and the performance history period information.

You must have security clearance for file maintenance and history maintenance to change the performance period information.

You can also define front-end menus and menu security at the menu option level.

MPA also interfaces with MAPICS XA front-end security and personalized menus. This system allows you to define front-end menus and menu security to the menu option level.

Master files

The following files contain either detailed or summarized data used for measurement inquiry displays and update:

- Measurement Master (MSRMST):

  The Measurement Master contains the tailoring information for all fifteen measurements.

- Item Measurement (ITMMSR):

  Contains item oriented data from the Item Balance file and special identification codes as well as item-specific performance data for the current performance period.

- Customer Order History (CUSHST):

  Product Model oriented file contains sales or bookings forecasts, actual booking performance, and current and past backlog levels.

- Planner History (PLNHST):

  Summary performance data grouped by planner code and warehouse. This order management and inventory performance data is summarized by planner and warehouse.

- Work Center Performance (WKCPFR):

  Output, capacity, and queue performance history maintained by work center.

- Inventory Performance History (INVPFR):

  A history of inventory levels (actual and projected) is maintained for six different inventory categories with stock balance record accuracy, shipping performance and inventory turn over history.

These files store performance history and normally require little maintenance. To get full use of the measurements, you should maintain the classification parameters in the Item Measurement, Planner History and Work Center Performance files. There is a Customer Order History record for each product model or product group. If you decide to manually assign model codes when you answer the application tailoring Questionnaire for MPA, add the model codes that you create to the appropriate finished goods items in the Item Measurement file. This can be done automatically if you select the item class code as the model code when you tailor MPA.

You can also enter some past performance into these files when you first get started. If you have the appropriate data available, you can use File Maintenance and enter performance history before using MPA Period Close. This file maintenance function should not be used to maintain performance data except for entering past performance that you have collected before installing MPA or possibly to correct some history collected in error.

Read the section “Implementing and Using” in this book before starting the installation procedures as defined in the *Planning and Installing MAPICS XA*.

Job files used in MPA are audit files. These files hold information for the detail audit reports. They are indicated by the measurement and AUD. For example, MO1AUD is the audit report for Measurement 1–Customer Booking Performance. Not all measurements have audit reports.

During cycle counting, two files are used. Item Measurement (ITMMSR) file is used to hold cycle count information for uncontrolled warehouses while the Cycle Count Location file (SLCYCL) is used to hold cycle count information for controlled warehouses. During cycle counting posting this information is updated. At Inventory Adjustment the information will be removed.

The Data Entry files for MPA are used in cycle counting. The transaction file is Cycle Count Transaction (CYCTRN). The header information is the Cycle Count header file (CYCTRC).

Some temporary files are used to hold information until period close.

Using eWorkPlace with MAPICS XA documentation

eWorkPlace (eWP) is the Microsoft®, Windows‘™-based graphical user interface for MAPICS XA. The eWP windows co-exist with the MAPICS XA character-based displays, called Host screens. If you are using eWP, you can view the corresponding Host screen for any eWP window, if necessary.

Note: If you have modified a Host screen, the GUI default is used. The default GUI feature can be enabled or disabled.

The user’s guides and help text contain instructions that reference the host MAPICS XA screens (called panels and displays) rather than the eWP windows.

To understand how a Host screen instruction relates to an action on a eWP window, it is helpful to look for text on a window control that corresponds to the instruction. For example, **Cancel** on a button and on a File pull-down corresponds to the user guide instruction “use **F12=Cancel** to return to the previous display”.

Note: For the instruction “press **Enter**”, the corresponding control on an eWP window is an **OK** button.

The following table shows other examples of instructions from the documentation and the corresponding actions you take on the eWorkPlace window.

Documentation instructions	eWorkPlace actions
To change the details of a vendor, type **2** next to the vendor and press **Enter**.	Select a vendor, then select Change or type C from the List menu or select Change using the right mouse. Click the OK button.
To create a vendor, use **F6**.	Select Create on the Functions menu or click the Create button.
Position to command. If you want to skip to a particular command, type the full or partial command.	Type the full or partial command in the position to entry field and click the Position button.
Type the information requested and press **Enter**.	Type values in or select values for the entry fields and click the OK button.
Type the information requested and use a function key.	Type values in or select values for the entry fields and click a button or select an action on the Functions pull-down.
Use the Item Master maintenance display to.....	Use the Item Master maintenance window to.....

For more information about eWP, see *Getting Started with eWorkPlace*.

Chapter 2. Implementing and Using

The Main Menu is the first display you see when you select Manufacturing Performance Analysis on the Application Selection Menu. Each option takes you into a different function.

AM7M00—Main Menu

```
AM7M00              Manufacturing Performance Analysis          **********
                                 Main Menu

Type option or command; press Enter.

     1. Inquiry Menu >>
     2. Reports Menu >>
     3. Close Simulation
     4. Period Close
     5. File Maintenance Menu >>
     6. Cycle Count Menu >>









==> ____________________________________________________________________

F3=Exit          F4=Prompt    F9=Retrieve    F10=Actions
F11=Job status   F12=Return   F22=Messages
```

Option 1. Use this option to select the measurement inquiry you want to view.

Option 2. Use this option to select the measurement report you want to print.

Option 3. Use this option to select the measurement you want to update with Close Simulation.

Option 4. Use this option to select the measurement(s) you want to update with period close.

Option 5. Use this option to select the file you want to maintain.

Option 6. Use this option to select the cycle counting function you want to perform.

Installing MPA

The application tailoring Questionnaire for the Manufacturing Performance Analysis (MPA) application is described in *Planning and Installing MAPICS XA*. The installation steps follow.

1. Preinstallation Activities

   Both this chapter and Chapter 1 should be reviewed before you attempt to install MPA. These two chapters contain information you need to be aware of before you start installation. You will save time by knowing what data is required before attempting implementation. This allows you to gather or define this data before initiating the implementation procedures.

2. Application Installation and Tailoring

   Use the installation instructions in *Planning and Installing MAPICS XA* to install the application programs. As the instructions indicate, after the programs are installed, you must maintain each measurement record. The Measurement Master, option 7 on the File Maintenance menu, allows you to maintain each of the 15 measurements at your convenience. Defaults are set for each of the 15 measurements. However, some of the defaults will be tailored to how your Inventory Management (IM) questionnaire is answered (i.e., for instance, costing method) or whether applications are installed (i.e., for instance, Material Requirements Planning). Therefore, you must maintain each measurement before doing any period simulations or closes in MPA. The measurements can be changed at any time after initial installation. You can choose to maintain one, a few, or all of the measurements during a maintenance session. The Measurement Master options control such things as how often the measurement is updated and the unit of measure used to show the measurement. The balance between forecast and history periods is maintainable. Refer to “Measurement Master File Maintenance” to get an understanding of the Measurement Maintenance options and see what default values have already been loaded to each of the measurements. There is a blank chart in Appendix A to fill in your company’s own defaults.

3. Master File Initialization and Maintenance

   After initial installation, the next step is Master file maintenance. The following sequence is recommended but not required when maintaining the files: Accuracy Tolerance, Customer Order History file, Planner History file, Work Center Performance file, and Item Measurement file.

   Accuracy Tolerance maintenance must be performed before Item Measurement maintenance if you intend to use any Cycle Count or Bill of Material Accuracy tolerances codes other than blank. A valid accuracy tolerance code must exist in the Accuracy Tolerance file before that code can be assigned to an Item Measurement record. Type in the cycle count tolerance and bill of material tolerance codes in the Item Measurement file. The value defaults to blank, which is the default Accuracy Tolerance file value, representing a tolerance of plus or minus zero.

   The History files contain some parameters that define how performance data is grouped in addition to storing actual and projected performance data. If you have been collecting some performance measurements before installing MPA you may want to enter some past performance into the performance history files when you first get started. If you have the appropriate data available, you can use the File Maintenance function to bring these files up to date and not have to wait several periods in order to see some performance trends. You should be aware that Measurement Period Close will roll all data in each period to the

previous period and then post the current performance to the last period during each period close. Some measurements have forecast periods, which will be the last periods, so these measurements will be updating the last period before the forecast period. Each period is “dated” with the month and day that the measurement was closed in MMDD format.

The file maintenance function should not be used to maintain performance data except for entering past performance you have collected before installing MPA or on rare occasions, to correct some history collected in error. When you are entering past performance data to MPA, enter the period dates in the Measurement Master file with an AS/400 Data File Utility program (DFU) or a user written program. You should close the affected measurement before entering your past performance data to see which period fields are the appropriate fields to maintain. By doing this you will be able to see the period and date being used for current performance. Then by entering this past performance it will appear on the Inquiries, Reports, and History Maintenance displays.

After creating the accuracy tolerance codes, you should maintain the Customer Order History file. You can chose to automatically create these records from the item class codes during application tailoring. The Customer Order History file should have one record for each product model or product group you sell. To manually create a record, you must define a model code for each of your product models or product groups. Model codes should be assigned to the end items in the Item Measurement file. Customer Order Booking Performance and Customer Order Backlog Analysis are grouped by model code. The Item Class code can be used to automatically generate Model codes.

The next file that should be maintained is the Planner History file. You can only change or delete planner history records since these records are automatically created from the planner numbers assigned in the Item Balance file and Open Order file. The only maintenance you need perform is to add the planner description, the planner type and (optionally) assign the planner to a planner group. The planner description should be a description of the type of parts with this planner number. The planner group is used to group the performance of several planner numbers together. The planner type code indicates that the items with this planner number are Master Schedule Items (M), Purchase Items (P) or Manufactured Items (blank).

After maintaining the Planner History file, the Work Center Performance file should be maintained. A Work Center Performance file record is created for each work center record in the Production Facility file. A work center group (GROUP ID) is used to group the performance of like work centers together.

The last Master file to maintain is the Item Measurement file. Much of this maintenance involves using codes that were created in other MPA files such as the model code and accuracy tolerance codes. Measurement Period Close maintains the following Item Measurement fields:

- Cycle Count Accuracy:
  - ***Quantity*** and ***Deviation***
  - ***Book Value*** and ***Deviation***
  - ***Compare Date***
  - ***Cycle Count Posting Date***.
- ***Number of Bills Accurate***, ***Number of Bills Audited***
- ***Date of Last Bill Audit***
- ***Excess Inventory: 1ST, 2ND, 3RD Periods***.

4. Measurement Period Close

   Measurement Period Close sets the end date for the current period and the start of the next period for each measurement. Take care taken when initially selecting a measurement for Period Close. For example, if you want to close MPM 1 monthly, you should select it for close at the end of your fiscal month or calendar month. After you have performed Period Close for the first time, performance data starts to accumulate directly from other MAPICS XA activities, for example:

   - Process customer orders in Customer Order Management
   - Releasing Manufacturing or Purchase orders in Material Requirements Planning or in Inventory Management.
   - Processing transactions against orders in Inventory Management and Production Monitoring and Control.
   - Close out and Purge Manufacturing Orders or Purchase Orders in Inventory Management or Production Control and Costing.

   The frequency defined in each Measurement Master file defines when the next period close is due.

5. Scheduling Period Closes

   The Period Close functions should be performed on a regular basis. For each measurement that you intend to use, establish a day of the week or month to perform Period Close. Period Close should be scheduled to run during a low system use time of the day because of the system resources it uses and the number of records that some Period Close routines must process. When the Period Close option, option 4 on the Main Menu, is selected, a list of all of the Measurements is shown to select the Measurements that you want to close. The measurements that are due for close are automatically designated as selected for close. All that Period Close requires you to do is agree with the close selections.

Measurement Period Close and Update

Each performance measurement draws data from other MAPICS XA files during Period Close. Regular performance of Period Close for each measurement allows you to obtain consistent and representative performance data. Period Close is an important function to the validity of each measurement.

Note: If EPDM is activated, MPM 7, 12, and 13 are disabled.

The Measurement Period Close function can be performed independently for each measurement. Each measurement has its own measurement frequency definition that governs how often the Period Close should be performed. The measurement frequency definition is user-defined. You can set one measurement to be closed weekly and another to be closed monthly. Once a measurement has been closed the Period Close Selection display lets you know the next time the measurement should be closed. The timing of some of the measurement period closes is very important due to the calculations and comparisons that are performed during period close. Dynamic data is being drawn from other MAPICS XA application files, and, if the measurement is not closed at the proper time, it may not provide consistent performance data period-to-period. The Period Close Selection function automatically selects measurements for close when they have reached period end. But it is your responsibility to actually initiate the close for the measurement.

Each time you view the Period Close Selection display (AM7K11), a “C” appears next to the measurements that should be closed. If you do not want to close a measurement, type a blank in the action field and the measurement will be skipped. When you agree with the selections (use **F23 Start Closes**), each measurement’s close status and printing options are shown. You can change these default print options. If you decide that the measurement should not be closed (use **F24 Bypass Close**) as you review it, you can cancel the close selection.

Period Close updates the master files with performance data and, optionally, prints a performance report and an audit report. The performance report is the report version of the performance inquiry display. See Chapter 4 for more information. The audit report is a listing of the detail data used to calculate and update the performance data. The audit report is used to validate the performance measurement as well as identify items, orders, database files, or procedures that require corrective action.

Some of the measurements use forecast or projections in their performance analysis. These measurements have forecast as well as history periods. The number of forecast periods used can be defined in the Measurement Master file. During the Period Close forecast entry step, you are expected to add a forecast period and make any needed forecast adjustments to the other forecast periods.

To understand each measurement’s significance, you should be aware of where the data for each measurement comes from, and how this data is processed. The following discussion of each measurement’s Period Close procedure provides insight into each measurement’s meaning.

MPM 1. Customer Order Booking Performance

The Period Close routine for this measurement is a two-step process. Step one presents the Customer Order Booking Performance Forecast Entry display (AM7G12) for forecast update after the Customer Order Booking Performance Period Close options display (AM7G11). Step two collects the actual bookings for the period being closed.

When the forecast is entered and the Period Close initiated, the first forecast period is protected from any further update or change. This frozen forecast is compared with the next period's actual bookings during the Period Close.

When all of the product models have had their forecasts updated and the Period Close is initiated, the actual bookings for the period being closed are drawn from the Customer Order Management Batch Update. Your actual bookings should be the same as bookings in the Order Entry and Invoicing application. This booking information is found in the Monthly Activity file. The Period Close accumulates actual customer orders entered during the period by product model code. The total booked dollars and units for each model are then compared to the forecast from the previous Period Close.

This measurement shows the deviation of actual from forecasted bookings as a percent. This percentage deviation represents the accuracy of the last forecast. This Customer Order Booking performance can be seen on an inquiry display (AM7A11) or on a printed report (AM7C2) as soon as this period close is complete.

Period Close automatically produces a printed measurement for each product model code if you want. This parameter can be set during measurement tailoring. The printed measurement contains the performance for all the history periods, the period just closed, and the forecast periods.

Period Close activity is considered the start of the next period. Any customer orders entered after this measurement is closed are considered actual bookings for the current period. This means that there cannot be any late order entry or maintenance of forecasted units or dollars for any product model.

To see current period performance anytime during the period, you can simulate the Period Close. This simulation is similar to the Period Close except that the current period's forecast cannot be updated. During simulation, you can update the other forecasts. Simulation accumulates the total number of units and dollars booked period-to-date.

Simulation does not automatically produce any reports; however, the results can be printed (AM7C2) on demand or viewed on the measurement's inquiry display (AM7A11). You must understand that the simulation results show incomplete performance against the forecast. However, this simulation technique can be used to see if you are as far along as you should be any time during the period. The inquiry or the printed performance measurement shows the date of the last simulation in the current period.

MPM 2. Customer Order Backlog Analysis

The Period Close for this measurement analyzes the open customer orders to determine the dollar value and level of past due unshipped customer orders. This close process draws current Customer Order Status information from the Order Entry and Invoicing Customer Order files. Open customer orders are reviewed by line item for open quantity and value. They are accumulated by item number and then by product model code. Profit margin is calculated for each line item by comparing the sales dollar value to the inventory cost for the open quantity. This difference between the sales dollar value and the inventory cost value is called the profit margin amount. Inventory cost can be standard cost, average cost, or last cost. The cost definition for each measurement defaults to the value chosen during Inventory Management application tailoring. You can override this when you tailor each measurement;

however, you should only change this value immediately after a Period Close for the measurement.

Open and past due backlog quantities and dollar totals are accumulated for each product model code and posted to the Customer Order History file during Period Close. The past due status is based on either the customer order request date or the customer order manufacture schedule date. The Customer Order Backlog Analysis measurement allows you to select either date while you are viewing the inquiry (AM7A21) or selecting the report (AM7C31). If you have tailored this measurement to produce measurement reports (AM7C4) after Period Close, a printed performance measurement for each product model and one for the total of all product models are produced.

To see the backlog status any time during the period, you can use Close Simulation. This simulation is similar to the Period Close. It performs the same analysis of the Customer Order Backlog that Period Close does except only the current period is updated. Simulation does not automatically produce any reports. However, the results can be printed on demand (AM7C4) or viewed on the measurement's inquiry display (AM7A21). This simulation can be used to see if you are improving the schedule reliability of the backlog as the period progresses. The inquiry or the printed performance measurement shows the date of the last simulation as the date for the current period.

MPM 3. Master Schedule Performance

The Period Close for this measurement is a two-step process. The first step calculates the scheduled production for Planner types M (Master Schedule Items) and blank (Manufactured Items). If Materials Requirements Planning (MRP) is installed, this step calculates the production schedule from the open and planned orders for each manufactured item. If MRP is not installed, this step calculates the production schedule just from open manufacturing orders. The second step totals the production receipts for the period for the same planner and warehouse numbers.

You should be careful about timing the Period Close for this measurement so you close the period just after an MRP regeneration or net change planning run. If you wait too long to close the period, some production receipts that belong to the next period might be processed as part of the current period.

A production schedule is calculated for each of the forecast periods defined in the Measurement Master file. The first forecast period contains all past due open and planned order quantities.

The Master Production Schedule comprises the planned and open orders for all items identified as master schedule items in the Item Measurement file. This measurement collects the schedule for all manufactured items so you can see production schedule performance for all items, not just master schedule items. You should remember that you should assign master schedule items to their own planner numbers to keep their performance separate.

The second step in Period Close totals the quantity received to stock since the last Period Close for each manufactured item. This represents the actual production. When all the expected production values and the actual production values have been accumulated by item, these values are summed by planner number for each warehouse and posted to the Planner History file. The scheduled production quantity that was in the current period is moved into the first history period, and all the previous history periods are rolled back one period. The current period production

receipts are posted to the first history period, and all the previous history periods are rolled back one period. The scheduled production figures are posted to their respective forecast periods. When the performance measurement inquiry display (AM7A31) appears, it compares the scheduled production to the actual production receipts. The measurement shows actual production receipts as a percent of the scheduled production.

Any actual receipts posted after the Period Close are considered receipts for the new period. It is important that the period is closed promptly when the period ends so that the scheduled production and the actual production are for the same period. If the period is closed early, the production receipts period-to-date will not correlate with the scheduled receipts. This causes some of the production receipts scheduled for the previous period to appear in the following period and understate the current period's performance. If the period is closed late, actual production receipts that should belong to the next period are in the current period and overstate actual production.

To see the period-to-date production schedule performance anytime during the period, you can use Close Simulation. This simulation is similar to the Period Close except that only the current period is updated. Simulation only accumulates the production receipts and posts them to the current period. Simulation does not automatically produce any reports. However, the results can be printed on demand (AM7C6) or viewed on the measurement's inquiry display (AM7A31). The date of the last simulation appears as the date for the current period.

MPM 4. Shipping Performance

The Period Close for this measurement reviews MPA's Inventory Transaction History file for all shipping transactions that were captured from Customer Order Management. Transactions are selected based on the transaction date. As transactions are selected, they are flagged to indicate that they have been used for measurement Period Close.

The Transaction History file stores the shipping transactions with the sales dollar value, the customer order request date and the manufacture schedule date. A margin value is calculated for each transaction by comparing the sales dollar value to the item's inventory cost value. Inventory cost can be standard cost, average cost, or last cost. The cost definition for each measurement defaults to the value chosen during Inventory Management application tailoring. You can override this when you tailor each measurement. However, you should only change this value immediately after a Period Close for the measurement.

Each shipment is evaluated against both customer order due dates (request date and manufacture schedule date), and each shipment is classified as either on-time or late. Total shipments in units, sales dollars, margin dollars, and total on-time shipments in units, sales dollars, and margin dollars are posted to the Inventory Performance file. The old current period values are rolled into the first history period, and all of the history period values are rolled back one period. The performance measurement compares on-time shipments to total shipments and shows the on-time performance for each history period. On-time can be based on the customer order request date or manufacture schedule date. You can select either date while you are viewing the inquiry (AM7A41) or selecting the report (AM7C51)

To see period-to-date shipping performance anytime during the period, you can use Close Simulation. This simulation is similar to the Period Close except that only the current period is updated and no history periods are rolled. Simulation accumulates

only the Shipping transactions that had not been flagged since the last Period Close or previous Close Simulation. The same Period Close calculations and comparisons are made. The results are added to the current period's values. Simulation does not automatically produce any reports. However, the results can be printed on demand (AM7C8) or viewed on the measurement's inquiry display (AM7A41). The inquiry or the printed performance measurement shows the date of the last simulation as the date for the current period.

MPM 5. Inventory Performance Profile

The Period Close for this measurement is a two-step process. The first step accepts input of projected inventory values by inventory category. The second step accesses the Item Balance file and calculates the inventory values for each item and totals the inventory by warehouse and inventory category. The value for Work-In-Process (WIP) is also calculated in this step by accumulating the to-date costs of all open manufacturing orders. The results of both steps are posted to the Inventory Performance History file for each warehouse.

Some additional calculations are made during closing to update Inventory Turnover Trend (MPM 14). See the Period Close description for MPM 14 in this chapter for the details of these calculations.

The inventory categories are finished goods, manufactured items, purchased items, raw material, work in process, and other items. The item type code defines the inventory category for each item except for finished goods items and WIP. The categories are assigned as follows:

Category	Decision rule
Finished Goods Item:	Finished Goods Item code is Y in Item Measurement file
Work in Process (WIP):	Manufacturing Order Cost Totals
Manufactured Items:	Item type 1 or 2 and Finished Goods Item code is N in Item Measurement file
Raw Materials:	Item Type 3
Purchased Items:	Item Type 4
Other Items:	Item Type 0, 9, F or other user-defined item types

The inventory projection must be manually entered unless MRP is installed. If MRP is in use, the Planned Order file and the Requirements file are used to calculate the projected on-hand balances. (If MPSP is installed and interfacing to MRP, demand and planned orders for Master Scheduled Items is included.) This is done in the same way that MRP calculates an item's projected balance on an MRP item inquiry or a requirements planning report. A projected on-hand balance is calculated for each of the user-defined forecast periods in the Measurement Master file. This projected on-hand balance is extended by the item's inventory cost, and a projected on-hand value is accumulated for each inventory category described above. You are prompted to enter a projected inventory value for WIP inventory. You must manually project a WIP inventory value for each forecast period since MRP does not predict projected WIP balances.

If MRP is not installed, you are prompted to enter a projected inventory value for each of the inventory categories. If you are using MRP and are using multiple warehouses, the values that are being calculated from MRP's projected balances are

only for planning warehouses. You must manually enter the projected inventory values for each inventory category for any demand warehouse.

The projected inventory values are posted to their respective forecast period fields. The first projection period is protected from any further update after Period Close. The actual inventory values for each inventory category are posted to their respective fields for the period just closed.

You should be careful about timing the Period Close for this measurement so you close the period just after an MRP regeneration or net change planning run. If you wait too long to close the period, and some order release activity has taken place since the last MRP regeneration or net change planning run, the projected balances are distorted by any new order release activity.

To see the current inventory value anytime during the period, you can use Close Simulation. This simulation is similar to the Period Close except only the current period is updated. No projections are updated, and no history periods are rolled. The same Period Close calculations are made, and the current inventory values are posted to the current period field for each inventory category. Simulation does not automatically produce any reports. However, the results can be printed on demand or reviewed using the Inquiry display. The inquiry or the printed performance measurement shows the date of the last simulation as the date for the current period.

MPM 6. Inventory Record Accuracy

The Period Close for this performance measurement accesses the data stored in the Item Measurement file that is updated by MPA cycle counting. Inventory Management Cycle Counting does not update the Item Measurement file. The Cycle Counting in this application (MPA) enhances the Inventory Management Cycle Counting function.

When Period Close is performed, the Item Measurement file is scanned for items with cycle count activity since the last Period Close. The number of records that have had activity since the last Period Close are totaled. The number of records with the cycle count accuracy flag updated are totaled. The Cycle Count posting updates the accuracy flag if the Inventory record was accurate for the first count. The totals are posted to the Inventory Performance History file for each control group code and for the non-control group population. Inventory record accuracy appears as the percent of the items counted during the period that had accurate records. See “Cycle Counting” for a discussion of this audit technique and the Item Measurement file update process.

To see the current cycle count performance any time during the period, you can use Close Simulation. This simulation is similar to the Period Close except only those items that have been counted since the last Period Close are included in the calculations. This can distort the actual record accuracy value that regular Period Close produces since it is possible that more items will be counted before the period ends. Simulation does not automatically produce reports; however, you can see the results on the inquiry display (AM7A61) or the report (AM7CC).

The inquiry or the printed performance measurement shows the date of the last simulation as the date for the current period.

MPM 7. Bill of Materials Record Accuracy

When you select this measurement for Period Close, Queue Performance (MPM 12) and Output Performance (MPM 13) are also automatically selected for close. These three measurements cannot be performed unless Inventory Management (IM) or Production Control and Costing (PC&C) order close and purge has been executed since the last period close. When an order is closed and purged, an analysis of the component issues is made for this measurement. The issue-to-date quantity of each component for each order is compared to the expected quantity. This is the adjusted quantity-per extended by the orders received quantity plus or minus any order deviations. If the component items are not equal to the expected quantity, then the bill of material is considered inaccurate for the order. If the component has a bill of material tolerance value other than zero, the issued quantity can be “less than” the expected quantity by an amount equal to or less than the bill of material tolerance percent amount and still be considered accurate.

Note: If EPDM is activated, this measurement is disabled.

The Standard Adjusted Quantity-Per (QPASY) in the Product Structure file is affected by standard batch quantity and standard operation yield. This adjusted quantity-per is only calculated to reflect operation yield whenever the Calculate Adjusted Quantity-per selection (option 2) is run on the PDM Yield Calculation menu (AMEM06). This option should normally be run before any cost rollups, MRP planning runs, or Order Close and Purge runs. The accuracy of this measurement is affected by the accuracy of the adjusted quantity-per field in the Product Structure.

The MPA Inventory Transaction History file contains a record for each order close with this bill of material accuracy flag updated. The number of orders closed and number of orders with an accurate bill of material are totaled for each item. Period Close posts these totals to the Item Measurement file. The total number of Close transactions (bills audited) and the total number of accurate bills of material for all items are calculated for each warehouse and posted to the Inventory Performance History file. The measurement shows the percent of orders that were closed during the period with actual component part usage equal to the bill of material’s predicted usages within the accuracy tolerance range defined for each component.

You can see the results of the measurement on the Bill of Materials Record Accuracy display (AM7GE1). If you have tailored this measurement for reports after a period close, the Bill of Materials Record Accuracy report (AM7CE) prints.

Close Simulation is not available for this measurement. You should always close this measurement when you close and purge orders in either Inventory Management or Production Control and Costing. If you delay closing this measurement, it is possible the bill of material has changed and is not appropriate as the standard for this analysis.

MPM 8. Purchase Commitment Performance

The Period Close for this measurement uses the Open Purchase Order file and the MPA Inventory Transaction History files to calculate both purchase commitment for the next period and determine performance to plan for the period being closed. Since this measurement is measuring purchase receipts against expected receipts (open purchase orders), the measurement frequency for this measurement should be set with some thought. In order to use this measurement you must answer YES to the Inventory Management (IM) application tailoring question, “Do you want order

tracking support for purchase orders?." See "Measurement Master File Maintenance".

The open purchase orders that are due before the end of the next period are valued in inventory cost dollars, totaled by planner/warehouse, and posted as the next period purchase commitment. Inventory cost can be standard cost, average cost, or last cost.

Note: This measurement only values inventory items (INVFG is the ITEMASA file is 1).

The cost definition for each measurement defaults to the value chosen during Inventory Management application tailoring. You can override this when you tailor each measurement. However, you should only change this value immediately after a Period Close for the measurement has been processed.

Before posting current performance, all of the history fields in the Planner History file are rolled to the next previous field. All of the Purchase Receipt transactions for inventory items in the Inventory Transaction History file entered since the last Period Close are valued at inventory cost, totaled by planner for each warehouse, and posted to the first history period in the Planner History file. This measurement can be shown or printed by planner, warehouse, planner group, and in total.

This measurement shows purchase receipts as a percent of the purchase commitments. To see the receipt performance for the current period anytime during the period, you can use Close Simulation. This simulation is similar to the Period Close except that only the current period receipts are posted. No commitments are calculated, and no history periods are rolled. Simulation does not automatically produce any reports. However, the results can be printed on demand (AM7CG) or viewed on the measurement's inquiry display (AM7A81). The inquiry or the printed performance measurement shows the date of the last simulation as the date for the current period.

MPM 9. Order Reschedule Reliability

Selecting this measurement for Period Close causes Material Availability Performance (MPM 11) to be automatically selected as well. The Period Close for this measurement determines total open orders due prior to the end of the period and total past due orders for each planner number for each warehouse.

This measurement shows the percent of the open orders due prior to the end of the period that are not past due. To see the performance for the current period anytime during the period, you can use Close Simulation. This simulation is similar to Period Close except that only the current period is posted. This simulation can be used to see if you are improving the reliability of the order due dates as the period progresses. Simulation does not automatically produce any reports. However, the results can be printed on demand (AM7C1) or viewed on the measurement's inquiry display (AM7A91). The inquiry or the printed performance measurement shows the date of the last simulation as the date for the current period.

MPM 10. Order Release Reliability

The Period Close for this measurement collects all the Order Release transactions processed since the last close and determines if the release was on time. MPA captures each Order Release transaction is captured by MPA and includes the order release date and the due date. Each due date is compared to a calculated due date

using the item's planned lead time from the Item Balance file. If the calculated due date falls after the order's due date, the order was not released with enough lead time.

Period Close totals the number of orders released since the last Period Close and the number of orders released on-time. These are totalled by planner number for each warehouse and posted to the Planner History file.

This measurement shows the number of orders released on-time as a percent of the total number of orders released during the period. To see the performance for the current period anytime during the period, you can use Close Simulation. This simulation is similar to the Period Close except that only the current period is posted and no history periods are rolled. This allows you to monitor the reliability of current order release activity during the period. Simulation does not automatically produce any reports; however, the results can be printed on demand (AM7CK) or viewed on the measurement's inquiry display (AM7A91). The inquiry or the printed performance measurement shows the date of the last simulation as the date for the current period.

MPM 11. Material Availability Performance

During Period Close, all the open manufacturing orders are analyzed for component shortages. The method for analyzing shortages is identical to the Inventory Management Order Shortage Follow-up analysis. This measurement is intended to track the level of orders that are released but cannot be started due to component shortages. The Period Close analysis evaluates component item availability against on-hand unallocated inventory only or considers scheduled receipts against the required date at your option. If you choose not to include scheduled receipts in the analysis, you should expect all of an assembly's components to be in stock at the time an order is released to make the assembly. This is the way MRP normally plans component part availability. If you choose to include scheduled receipts, and a component for an order is not in stock, but an open order to make or buy this component is due before the required date, this item is not considered short. Any past due orders are considered as on-hand inventory the first day of the period. If you choose to include scheduled receipts, the analysis assumes you have very good order controls in place; that is, the Order Reschedule Reliability (MPM 9) and Master Schedule Performance (MPM 3) results should be good (95% or better on-time orders and 95% or better on-time receipts).

The Period Close for this measurement runs automatically when the Period Close for Order Reschedule Reliability (MPM 9) is run. The number of open manufacturing orders for each planner number for each warehouse is already posted to the Planner History file by MPM 9 Period Close. This measurement's Period Close calculates and posts the number of orders with shortages.

This measurement shows the percentage of the open orders that are not short.

Caution: If some planner numbers include a mixture of purchased and manufactured items, this measurement does not give a true performance picture since Purchase Orders do not have shortages. Planner numbers should be assigned as a method of classifying items into groups for planning purposes. Then assign planner numbers to individual planners. The planner group code is used to group the performance of several planner numbers together.

To see the performance for the current period anytime during the period, you can use Close Simulation. This simulation is similar to the Period Close except that only the current period is posted, and no history periods are rolled. Simulation does not automatically produce any reports. However, the results can be printed on demand

(AM7CM) or viewed on the measurement's inquiry display (AM7AB1). The inquiry or the printed performance measurement shows the date of the last simulation as the date for the current period.

MPM 12. Queue Performance

The Period Close for this measurement is run automatically when Period Close is run for Bill of Materials Record Accuracy (MPM 7). The Period Close for this measurement also performs Period Close for Output Performance (MPM 13). Production Control and Costing (PCC) order close and purge sets this measurement up for close. When you run Order Close in PC&C, the Production Facility file is updated with the current queue in standard hours.

Note: This measurement is disabled if EPDM is activated.

Period Close calculates planned queue for each work center by multiplying the planned capacity by the planned queue days and posts it to the Work Center Performance file. All of the history periods are rolled to the previous history period. The Queue Performance report (AM7CO) is printed if you tailored this measurement to automatically print measurement reports during Period Close. This measurement shows the difference between current and planned queue as a percent of planned queue.

Close Simulation is not available for this measurement because the measurement requires information generated during order closeout and purge in Production Control and Costing (PCC). This information is generated from Order Closeout and purge when you select Y (yes) for Work Center Analysis Report on display Reporting and Purge (AMC530). Therefore, you should close this measurement when a purge has been completed for PC&C or the information will not be easily interpreted.

MPM 13. Output Performance

The Period Close for this measurement is run automatically when Period Close is run for Bill of Materials Record Accuracy (MPM 7). Production Control and Costing order close and purge sets this measurement up for close. When you run Order Close in Production Control and Costing, the Production Facility file is updated with the current output in standard hours.

Note: This measurement is disabled if EPDM is activated.

This Period Close calculates standard output for each work center and posts it to the Work Center Performance file. The planned output for each work center is calculated using the same technique that Production Control and Costing uses to calculate work center capacity. This planned output is posted to the Work Center Performance file. All of the history periods are rolled to the previous history period, and a report is printed if you tailored this measurement to automatically print measurement reports during Period Close. This measurement shows the actual output as a percent of planned output. Close Simulation is not available for this measurement because the measurement requires information generated during order closeout and purge in Production Control and Costing (PC&C). The information is generated from order closeout and purge when you selected Y (yes) for Work Center Analysis report on display Reporting and Purge (AMC530). Therefore, you should close this measurement when a purge has been completed for PC&C or the information will not be easily interpreted.

MPM 14. Inventory Turnover Trend

Period Close for this measurement is performed during Period Close for Inventory Performance Profile (MPM 5). This Period Close calculates days supply on hand (DSOH) for Finished Goods and for Production Inventory. If you are not using MRP, you are prompted (AM7GT2) to enter a value for expected shipments at inventory cost for the next three frequency periods. Expected production is drawn from the open manufacturing orders for finished goods items due during the next three frequency periods. The two values, expected production and expected shipments, are divided by the number of working days in three frequency periods to determine the inventory value of one day's production and shipments. Total finished goods inventory value is divided by the inventory value of a day's shipments to determine the DSOH of finished goods inventory. The total inventory value less the finished goods inventory value is divided by the inventory value of a day's production to determine the DSOH of production inventory.

The calculations used are FDSOH = F(S/N) and PDSOH = I/(P/N) where:

FDSOH Days supply on hand of finished goods inventory.

PDSOH Days supply on hand of production inventory.

F Total finished goods inventory.

I Total inventory less finished goods inventory.

N Number of days in three frequency periods assigned to this measurement. For example, if the frequency for this measurement is monthly, N is 60 working days.

P Planned production (finished goods items open and planned orders) for three frequency periods.

S Planned shipments (finished goods items requirements) for three frequency periods.

If you are using Material Requirements Planning (MRP), number of days (N) of shipments and number of days (N) of production are calculated from the Planned Order file and Requirements file. The days supply on hand (DSOH) for finished goods and production inventory are calculated as described above. For finished goods items, total requirements for three frequency periods valued in inventory cost dollars are divided by the number of working days in three periods to get the average value of one day's shipments. The Master Production Schedule is equal to the inventory cost value of all scheduled receipts and planned orders for all finished goods Items due before and during the first three periods. This value is divided by the number of working days in three periods to determine one day's production value.

Period Close posts days supply on hand for finished goods and production inventory to the Inventory Performance file. All the history periods are rolled to the previous history period. To see the performance for the current period anytime during the period, you can use Close Simulation. This simulation is similar to the Period Close except that only the current period is posted, and no history periods are rolled. Simulation does not automatically produce any reports. However, the results can be printed on demand (AM7C5) or viewed on the measurement's inquiry display (AM7AE1). The inquiry or the printed performance measurement shows the date of the last simulation as the date for the current period.

MPM 15. Excess Inventory Analysis

Period Close calculates each item's expected inventory usage for each excess period. If Material Requirements Planning (MRP) is installed, the planned requirements are totaled for each excess period for each item with an inventory balance in each planning warehouse. If MPSP is installed and interfacing to MRP, the demand for each Master Scheduled Item is totalled in each excess period. Excess periods are lengths of time (i.e., 3 months, 6 months, 18 months, etc.). Each of the three excess periods are defined in the Measurement Master file maintenance.

Each item's available inventory is compared with the requirements for each excess period to determine the amount of available inventory that is on hand and in excess of that period's requirements. If MRP is used, the requirements file is used to calculate requirements. If MRP is not used, estimated annual usage from the Item Balance is used to calculate requirements.

The calculation subtracts the excess period requirements from available inventory. Any remaining inventory, valued in inventory cost dollars, becomes the excess amount for that excess period. This excess amount is posted to the Item Measurement file, totaled by planner for each warehouse, and posted to the Planner History file.

This measurement shows the value of excess inventory for each excess period by planner number and warehouse, and planner group. To see the performance for the current period anytime during the period, you can use Close Simulation. This simulation is similar to the Period Close except only the current period is posted, and no history periods are rolled. Simulation does not automatically produce any reports. However, the results can be printed on demand (AM7CU) or viewed on the measurement's inquiry display (AM7AF1)

File Maintenance

Some File Maintenance is required for all history files except for the Inventory Performance file. This maintenance consists of adding some descriptive data such as planner description and product model code name. These fields are discussed below. Records can be changed or deleted with File Maintenance; however, the Customer Order History file is the only history file that you can add records to through File Maintenance.

To add any one of these:	Add any one of these to PDM or IM:
Item Measurement	Item Balance
Planner history	Planner numbers
Work Center Performance	Work center numbers (Production Facility file)
Inventory Performance	Warehouses (Warehouse Master file)

Note: If EPDM is activated, the Work Center Performance information is not used.

The History files contain performance history data that can be maintained through File Maintenance. This function is provided for those companies that may want to load performance data for the periods before MPA was installed, or want to correct some performance data that may have been updated in error. This function requires a user be authorized for History Maintenance in MAPICS security for MPA. Since this is a special level of security, not all screen data is accessible to the user cleared for MPA File Maintenance. Please secure this function to inhibit any unauthorized changes.

Item Measurement file

Item Measurement fields that require maintenance:

Model code Groups this item with other finished goods items by product model. This can be the same as the item class code. See the application tailoring question 707 “HOW DO YOU WANT TO SPECIFY YOUR MODEL CODE DEFAULT IN THE ITEM MEASUREMENT FILE?”

Master schedule item Identifies this item as a master schedule item. The default is Y if the low level code is 00, or the Master Schedule Item Code in the Item Master file is M. Otherwise, the default is N.

Finished Goods Item Identifies this item as a finished goods item for MPM 5 and MPM 14. The default is Y if the low level code is 00.

Control group code Identifies the cycle count control group code for this item. This affects the inquiry for MPM 6 and the cycle selection process.

Bill of material accuracy tolerance code The accuracy tolerance code from the Accuracy Tolerance file. This value is used for bill of material accuracy analysis.

Count accuracy tolerance code The accuracy tolerance code from the Accuracy Tolerance file. This value is used for cycle count accuracy analysis. The value defaults to blank, which is the default Accuracy Tolerance file value representing a tolerance of plus or minus zero.

Planner History file

The Planner History file is updated with any new planner numbers entered for Item Balance records or open orders.

Note: If Order-Based Production Management (OBPM) is installed, the planner number in the Item Balance File is edited against the Planner Code File. Information entered in Planner History File Maintenance does not update the OBPM Planner File.

If a new planner number is assigned to an Item Balance record or to an order, a new Planner History record is automatically created. When the Planner History record exists, you should update the planner description, planner group, and the planner type code in File Maintenance (Menu AM7M30, option 3). The planner description should describe the kind of items with which this planner number assigned. The planner group code can be used to identify the planner responsible for this item or a major group to which the item belongs. The planner type, on the other hand, indicates the predominant type of item in this planner number:

blank Manufactured items
M Master schedule Items
P Purchased items

Work Center Performance file

The only thing you need to update in this file when the record is added is the work center group identification (ID). This field can be maintained by File Maintenance and is used to group similiar work centers to evaluate the total performance of the group.

Inventory Performance file

There is no requirement for any additional record updates to this file. File Maintenance is only needed if the performance data is in error, or you want to add performance history that was collected before using MPA.

Customer Order History file

The Customer Order History file contains a record for each model code assigned in the Item Measurement file. This is the only Master file that you can add records to through File Maintenance. These records are automatically created if you choose to use the item class code as the model code during installation tailoring. The model number and the model name are the two fields you would normally maintain in this file. The file contains Customer Order oriented performance data for each product model such as bookings forecasts, actual bookings, and backlog levels.

Measurement Master File Maintenance

Each Performance Measurement has its own Measurement Master record that has user-defined parameters. These parameters define when to close the measurement and how to display the measurement.

You are expected to define the measurement frequency, assign performance target values, select a dollar basis code and a unit basis code, and define the number of history and forecast periods. Some of the measurements should be updated more frequently than others, and some require higher performance targets than others. Each measurement should be reviewed and maintained to fit your company's performance periods and operating characteristics. For example, you may want the Shipping Performance (MPM 4) frequency to match your shipping months. For some measurements, the close frequency must be correlated with another measurement or with a function you perform in other MAPICS XA applications such as order closeout and purge in IM or PC&C or planning run regeneration in MRP.

The major fields that must be maintained in each Measurement Master record are:

Measurement Frequency: This code defines how often the measurement is updated and, in some cases, how far into the future periods extend.

1 Daily
2 Weekly
3 Biweekly
4 Monthly
5 Quarterly
6 Quad weekly (every four weeks)

If you want to change your measurement frequency after MPA has been collecting period data, be sure to change it immediately after a period close.

Target Values: The target values set for each measurement define the objective or performance goal for this measurement. The target values describe the expected or desired performance results in terms of the Measurement display. For instance, if the measurement shows actual as a percent of planned, the target is a percentage value. For example, the target values for Inventory Record Accuracy (MPM 6) of 95.5 for the low value and 100.0 for the high value represent a goal of 95% or better of the records audited should be accurate. For the measurements that show a percentage deviation, the target values should be a range between a negative and positive percentage. For example, the target values for MPM 1 of -20.0 for a low and 20.0 for a high value represent a goal of -20% to +20% deviation of actual from forecast.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports.

1 One Dollar
2 Ten Dollars
3 Hundred Dollars
4 Thousand Dollars
5 Ten Thousand Dollars
6 Hundred Thousand Dollars
7 Million Dollars
8 Ten Million Dollars
9 Hundred Million Dollars.

Unit Basis Code: This code specifies the desired unit of measure for amounts other than currency amounts shown on the measurement's inquiry or reports.

C Thousandths
B Hundredths
A Tenths
1 Ones
2 Tens
3 Hundreds
4 Thousands
5 Ten Thousands
6 Hundred Thousands
7 Millions.

Number of History and Forecast Periods: Each measurement has a maximum number of periods available for storing either past performance or forecasted performance. Some measurements only have history periods. You can choose the number of forecast periods for certain measurements.

Before you install MPA and maintain the individual measurements, you should read the following description for each Measurement Master Record. It may help if you refer to this chapter as well as "AM7I71—Measurement Master Maintenance (Select)". When you initially maintain each measurement, you can set the target values so they are achievable and then tighten the targets as performance improves. Each measurement can be easily modified as conditions change in your company. The Measurement Master records can be maintained at any time. With this in mind, you might consider using the default values at first and see how these parameters affect the displays and printed reports. Suggestions for maintaining your measurements follow.

The following table is a chart of the defaults for each measurement along with some suggestions of which measurements should have the same frequencies.

Note: If EPDM is activated, MPM 7, 12, and 13 are disabled.

Table 2-1. Measurement Master defaults

MPM	Frequency	Low target value	High target value	Dollar basis	Unit basis	# of history periods	# of forecast periods (history + forecast = 26)	Default date for past due R/M	Cost calculation method	Use req/planned orders in MRP	Include schedule receipts	# of periods to determine availability	Include customer reqs in availability calculations	Excess period lengths
1–Booking	Monthly (4)	20-	20	Thousand (4)	Ones (1)	23	3							
2–Backlog	Monthly (4)	90	100	Thousand (4)	Ones (1)	26	0	M	Standard (1)					
3–MSP	Monthly (4)	90	110	Thousand (4)	Ones (1)	23	3		Standard (1)	Y				
4–Shipping	Monthly (4)	90	100	Thousand (4)	Ones (1)	26	0	M	Standard (1)					
5–Inventory Performance	Monthly (4)	20-	20	Thousand (4)	Ones (1)	23	3		Standard (1)	Y				
6–Inventory Record	Weekly (2)	95	100	Thousand (4)	Ones (1)	26	0		Standard (1)					
7–BOM	Weekly (2)	95	100	Ones (1)	Ones (1)	26	0							
8–POs	Weekly (2)	90	110	Thousand (4)	Ones (1)	25	1		Standard (1)					
9–Order reschedule	Weekly (2)	95	100	Thousand (4)	Ones (1)	26	0							
10–Order release	Weekly (2)	90	100	Thousand (4)	Ones (1)	26	0							
11–Material availability	Weekly (2)	95	100	Thousand (4)	Ones (1)	26	0				N	1	Y	
12–Queue	Weekly (2)	20-	20	Thousand (4)	Ones (1)	25	1							
13–Output	Weekly (2)	95	100	Thousand (4)	Ones (1)	25	1							
14–Inventory Turnover	Monthly (4)	00	00	Thousand (4)	Ones (1)	26	0		Standard (1)	Y				
15–Excess Inventory	Monthly (4)	00	00	Thousand (4)	Ones (1)	26	0		Standard (1)	Y				6, 12, 18

Notes:
1 (Booking), 2 (Backlog), and 4 (Shipping) should be the same frequency.
3 (MSP) should be a frequency equal to changes to your master production schedule.
5 (Inv perf) and 14 (Inv turn) should be the same.
6 (Inv record) should correspond to your cycle counting frequency.
7 (BOM), 12 (Queue), and 13 (Output) depend on order closeout and purge in IM and PCC
9 (Order reschedule), 10 (Order release), and 11 (Material avail) correspond to MRP regeneration or re-plan inventories.

MPM 1. Customer Order Booking Performance

Measurement Frequency: This is a measurement of forecast accuracy. The measurement compares the customer orders booked for a product during a period against the predicted bookings for the product during that same period. The measurement frequency should be the same period used by your company to close booking activity. This should be in tune with the time periods you refer to when forecasting booking or sales activity. The default frequency is monthly.

Target Value: This measurement shows the forecast error (that is, the difference between forecasted bookings and actual bookings) expressed as a percent of the forecasted bookings. The target values for this measurement should define the expected error range. The default values are -20.0 for the low value and 20.0 for the high value. This sets the target for acceptable performance to be less than 20% forecast error.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default value is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiry or printed measurement reports. The default value is ones.

Number of Periods: You should define the number of forecast and history periods that are maintained. The more history periods you maintain, the more trend information you can see on the reports and inquiries. However, you can also enter more projection information with more forecast periods. This measurement keeps track of the changes to the forecast for each period. If you have two or three forecast periods, you can see how the forecast changes as time passes. The default history periods is 23 history periods and three forecast periods.

MPM 2. Customer Order Backlog Analysis

Measurement Frequency: The measurement frequency for this measurement is probably set to correspond with the Customer Order Booking Performance (MPM 1) measurement frequency. However, if you want to see performance more often but still want the history periods to correspond with MPM 1, you can use Close Simulation to monitor the level of past due orders during the current period. The other measurement that might affect your frequency choice would be Shipping Performance (MPM 4) since shipping activity could affect the level of past due backlog. The default value is monthly frequency.

Target Value: This measurement shows the percent of the total backlog that is not past due. The low target value should indicate the lowest expected percentage of on-time, and the high target value would be 100%. The default low target value of 90.0 is a normal starting point. This means you expect less than 10% of all of the open customer orders to be past due.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default value is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiry or printed measurement reports. The default value is ones.

Number of Periods: This measurement only shows history periods. This number must be the maximum of 26 periods. The default is 26 history periods.

Default Order Due Date: This measurement compares the number of past due customer orders to the total customer order backlog. The customer order backlog for the purposes of this measurement is the number of unshipped units on open customer orders. The number of units that are past due is determined by comparing the current date with the Customer Order due date, which is either the request date (R) or the manufacture schedule date (M). The maintenance for this measurement asks you to set a default comparison date. However, the date you choose is not critical since you can see performance by either criteria. The date you choose depends on your company's policy for setting these dates. The default is M for manufacture schedule date.

Cost Calculation Method: The value to be used when expressing inventory dollars. The default for this is the method chosen when Inventory Management was installed (1 - Standard, 2 - Average, 3 - Last). The shipped default is one, standard.

MPM 3. Master Schedule Performance

Measurement Frequency: This measurement compares actual production receipts to stock against expected receipts to stock. Expected receipts to stock is drawn from open and planned manufacturing orders. These expected receipts are accumulated by adding all open order quantities that are due during the period. Your measurement frequency defines how far out to accumulate scheduled and planned receipts. You should set this frequency based on how often you change your master production schedule. This frequency is probably weekly or monthly, depending on the type of production environment in your company. Repetitive manufacturers probably prefer the shorter period. Performance periods usually represent the length of time, after which you cannot make up for a missed schedule. The default frequency is monthly.

Target Value: Since this measurement compares actual receipts against planned and scheduled receipts, it is possible to receive more than expected. The target values should be set accordingly. The default low target value is 90.0, and the high target is 110.0. This means that you expect actual receipts to be at least 90% and less than 110% of planned. These target values can be changed as time goes on.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default value is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiry or printed measurement reports. The default value is ones.

Number of Periods The number of periods for this measurement can be split between history and forecast. The default is 23 history periods and three forecast periods. Expected receipts are calculated for each of the forecast periods during period update. Only the first forecast period is measured against actual production receipts.

Cost Calculation Method: The value to be used when expressing inventory dollars. The default for this is the method chosen when Inventory Management was installed (1 - Standard, 2 - Average, 3 - Last). The shipped default is one, standard.

Use Requirements/ Planned Orders in MRP: If the MRP application is installed, and this is answered YES, the Planned Order file and Requirements file is used to project expected receipts (MPS) when the Period Close is performed. If MRP is installed and this is answered NO, only open orders are used to project the MPS. If MRP is not installed, this question does not appear.

MPM 4. Shipping Performance

Measurement Frequency: This is a measure of on-time shipments compared to total shipments. The Measurement frequency for this measurement should be the same period used by your company to close shipping activity. When the shipment is analyzed to determine if it is on-time, the system date during order release in COM batch update is compared to the due date on the customer order. Therefore, all the shipments are evaluated independent of the period length. The default frequency is monthly.

Target Value: The target values or objectives you set should be defined based on your official customer order due date. The default target values are 90.0 for the low value and 100.0 for the high value. This means you expect at least 90% of all shipments to be on-time.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default value is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiry or printed measurement reports. The default value is ones.

Number of Periods: The number of periods for this measurement can be split between history and forecast. The default is 23 history periods and three forecast periods. Expected receipts are calculated for each of the forecast periods during period update. Only the first forecast period is measured against actual production receipts.

Cost Calculation Method: The value to be used when expressing inventory dollars. The default for this is the method chosen when Inventory Management was installed (1 - Standard, 2 - Average, 3 - Last). The shipped default is one, standard.

Default Date: This measurement shows the percent of all the shipments for the period that were on-time. Shipments are on-time if the shipment date is not after the due date for the customer order. Your performance depends on how you set and maintain the dates on the customer order and the due date you intend to use as the official customer order due date. The maintenance for this measurement asks you to set a default comparison date. It will be either the request date or the schedule date. However, the date you choose is not critical since you can see performance by either criteria. The date you choose depends on your company's policy for setting these dates. The default is M for manufacture schedule date.

MPM 5. Inventory Performance Profile

Measurement Frequency: This measurement compares actual inventory levels to the corresponding inventory plan that MRP has developed, or that you forecast if you are not using MRP. The measurement shows the difference between planned inventory and actual inventory for each history period. The measurement frequency should be set to correspond with your company's internal inventory close period. The

frequency code you choose for this measurement is the frequency code for Inventory Turnover Trend (MPM 14). Since inventory level change is usually monitored more often than inventory turnover, this measurement has the dominant frequency code for the two measurements. The default frequency is monthly.

Target Value: The measurement shows the performance as a percentage deviation of actual from planned inventory. The default target values are -20.0 for the low and 20.0 for the high value. This means that actual inventory should not be more than 20% off of planned inventory.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default value is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiry or printed measurement reports. The default value is ones.

Number of Periods: The number of periods for this measurement can be split. The value to be used when expressing inventory dollars. between history and forecast. The default is 23 history periods and three forecast periods. Expected inventory is calculated for each of the forecast periods during period update. Only the first forecast period is measured against actual inventory.

Cost Calculation Method: The default for this is the method chosen when Inventory Management was installed (1 - Standard, 2 - Average, 3 - Last). The shipped default is one, standard.

Use Requirements: Planned Orders in MRP:If the MRP application is not installed, and this is answered YES, the Planned Order file and Requirements file is used to project inventory values when the Period Close is performed. If MRP is installed and this is answered NO, you will be prompted during Period Close to enter a projected inventory value for each inventory category. If MRP is not installed, this question does not appear.

MPM 6. Inventory Record Accuracy

Measurement Frequency: The frequency for this measurement should correspond with the cycle counting frequency for counting control group items. If you are taking your first, second, and third counts on successive days, weekly should be used. The frequency code specifies the period of time during which the items were audited.

Target Value: The target values set the goal or the expected accuracy range. Accuracy is the percent of the counted item numbers that had an accurate inventory balance. The default target range of 95.0 and 100.0 is the normal acceptable accuracy level. This means your goal is 95% or better inventory record accuracy.

Number of Periods: This measurement only shows history periods. This number must be the maximum of 26 periods.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default value is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiry or printed measurement reports. The default value is ones.

Cost Calculation Method: The value to be used when expressing inventory dollars. The default for this is the method chosen when Inventory Management was installed (1 - Standard, 2 - Average, 3 - Last). The shipped default is one, standard.

MPM 7. Bill of Material Record Accuracy

Measurement Frequency: The frequency for this measurement should be the same as the order close frequency. This measurement draws its data from order closeout and purge in Inventory Management or Production Control and Costing. This should be done on a weekly basis unless your order volume requires you to close and purge orders more frequently. The frequency chosen for this measurement automatically becomes the frequency for MPM 12 and MPM 13. This measurement shows the number of accurate bills of material for orders closed since the last measurement period update. The default frequency is weekly.

Target Value: This measurement shows the percentage of orders closed during the period that had an accurate bill of material. The default target range of 95.0 and 100.0 is the normal bill of materials record accuracy level.

Dollar Basis Code This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default value is ones.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiries or printed reports. The default value is ones.

Number of Periods: This measurement only shows history periods. This number must be the maximum of 26 periods.

MPM 8. Purchase Commitment Performance

Measurement Frequency: The frequency for this measurement should depend on the lead time for your purchase parts. The frequency should be set so that very few of the new purchase orders released during the period have due dates before the end of the period. If you have a high number of Purchase Orders that are due during the same month that they are opened, a monthly frequency would be too long. However, if very few new purchase orders opened during a two-week period have due dates during that same period, a biweekly or weekly frequency would provide an accurate measurement. The default frequency is weekly.

Target Value: The objective of this measurement is to insure that the open purchase orders for inventory items represent what is received into stock from the vendors. The measurement shows actual receipts as a percent of the expected receipts. The default target values are 90.0 for the low value and 110.0 as the high value. This means that you expect 90% to 110% of the orders due before the end of the period to be received during the period.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default value is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiries or printed reports. The default value is ones.

Number of Periods: The number of periods for this measurement can be split between history and forecast. The default is 25 history periods and one forecast period. Expected purchase receipts are calculated for each of the forecast periods if you have more than one. Only the first forecast period is measured against actual purchase receipts.

Cost Calculation Method: The value to be used when expressing expected receipts. The default for this is the method chosen when Inventory Management was installed (1 - Standard, 2 - Average, 3 - Last). The shipped default is one, standard.

MPM 9. Order Reschedule Reliability

Measurement Frequency: The frequency defined for this measurement automatically sets the measurement frequency for Material Availability Performance (MPM 11). When this measurement is updated, open orders are totaled by planner for each warehouse. Both this measurement and MPM 11 use this value. This measurement frequency should relate to the activity cycle for inventory planners, which is usually weekly. If you are running Material Requirements Planning (MRP), this frequency should correspond with the frequency you regenerate a planning run, or re-plan inventories. The default frequency is weekly.

Target Value: This measurement shows the percentage of orders that are on-time for each planner number and warehouse. The target value should represent the goal you have set for your inventory planners for non-past due orders. If you have set a goal for your planners to have less than 5% of their orders past due, the target values should be set at the default values of 95.0 for the low value and 100.0 for the high value.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default values is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiries or printed reports. The default value is ones.

Number of Periods: This measurement only shows history periods. This number must be the maximum of 26 periods.

MPM 10. Order Release Reliability

Measurement Frequency: When this measurement is updated, the number of orders released during the period are totaled by planner for each warehouse and compared to the number that did not have sufficient lead time for the assigned due date. If you are running Material Requirements Planning (MRP), this frequency should correspond with the frequency you replan inventories or regenerate a planning run. The default frequency is weekly.

Target Value: This measurement shows the percentage of the orders opened during the period that had sufficient lead time for each planner number and warehouse. The target value should represent the goal you have set for your inventory planners for on-time order releases. If you have set a goal for your planners to have better than 90% of their orders released with sufficient lead time, the default target values of 90.0 for the low value and 100.0 for the high value should be used.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default value is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiries or printed reports. The default value is ones.

Number of Periods: This measurement shows only history periods. This number must be the maximum of 26 periods.

MPM 11. Material Availability Performance

Measurement Frequency: The frequency defined for this measurement is the measurement frequency that was defined for Order Reschedule Reliability (MPM 9). When this measurement is updated, open orders are totaled by planner and warehouse. Both this measurement and MPM 9 use this value. If you are running Material Requirements Planning (MRP), this frequency should correspond with the frequency you regenerate MRP. The default frequency is weekly.

Target Value: This measurement shows the percentage of open orders that are not short component parts. The target value should represent the goal you have set for your inventory planners for orders without shortages. If you have set a goal for your planners to have less than 5% of their orders short, the target values should be the default values of 95.0 for the low value and 100.0 for the high value.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default value is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiries or printed reports. The default value is ones.

Number of Periods: This measurement only shows history periods. This number must be the maximum of 26 periods.

Include Scheduled Receipts: The shortage analysis for this measurement is the same as the follow up shortage analysis that is performed in Inventory Management. If you have orders that can be released and started even though some components are short, you should consider including scheduled receipts in the shortage analysis. However, if the majority of the production orders cannot be started unless all the components are available, you should not include schedule receipts in shortage analysis. If you select not to include schedule receipts in shortage analysis, MPA considers a component short if not enough inventory is on hand and available to fill the allocation regardless of the quantity scheduled on open orders before the component required date. The default value is N for No.

Number of Periods to Determine Availability: This number determines the cutoff date for component availability analysis. The number of periods entered is used with the measurement frequency to calculate a future component availability cutoff date. Any component activity which would occur after this cutoff date is ignored. The default value is one.

Include Customer Requirements on Availability Calculation: This question determines whether the Measurement Period Close will include customer

requirements and manufacturing allocations in the availability calculations. The default value is Y for yes.

MPM 12. Queue Performance

Measurement Frequency: The frequency defined for this measurement is the same as the measurement frequency for Bill of Materials Performance (MPM 7). When this measurement is updated, queues and output hours are totaled by work center. Both this measurement and Output Performance (MPM 13) use these values. The frequency should relate to the order closeout cycle for production orders, since the data for both measurements is drawn from values calculated during Production Control and Costing order closeout and purge. The order closeout frequency should correspond with manufacturing's performance period, which is usually weekly. The default frequency is weekly.

Target Value: This measurement shows the deviation of actual queue to planned queue for each work center. The deviation between the planned queue and the actual queue appears as a percent of the planned queue. The goal you have set for the people responsible for keeping work-in-process down should be reflected in these target values. The default target values are -20.0 for the low value and 20.0 for the high value.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default value is thousands.

Number of Periods: The number of periods for this measurement is split between history and forecast. The default is 25 history periods and one forecast period since only one forecast period is allowed. This cannot be changed. Expected queue is calculated based on the planned queue in the Production Facility file.

MPM 13. Output Performance

Measurement Frequency: The frequency defined for this measurement is set automatically to equal the measurement frequency for Bill of Materials Record Accuracy (MPM 7). When this measurement is updated, queue hours and output hours are totaled by work center. Both this measurement and Queue Performance (MPM 12) use these values. The frequency should relate to the order closeout cycle for production orders since the data for both measurements is drawn from values calculated during Production Control and Costing order closeout and purge. The order closeout frequency should correspond with manufacturing's performance period. The default frequency

Target Value: This measurement shows standard hours earned (output) as a percent of the planned output. The planned output is drawn from the shift capacities (factored by standard efficiency) defined in the Production Facility file. The target values should identify the expected earned hours against planned capacity. The default values are 95.0 for the low value and 100.0 for the high value to represent a 95% or better goal.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default value is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiries or printed reports. The default value is ones.

Number of Periods: The number of periods for this measurement is split between history and forecast. The default is 25 history periods and one forecast period since only one forecast period is allowed. This cannot be changed. Planned output is calculated for the forecast period during Period Close based on the planned capacity in the Production Facility file.

MPM 14. Inventory Turnover Trend

Measurement Frequency: The measurement frequency should be set to correspond with your company's internal inventory close period. The frequency code you choose for Inventory Performance Profile (MPM 5) is automatically set as the measurement frequency for this measurement. Since inventory level change is usually monitored more often than inventory turnover, MPM 5 has the dominant frequency code. The default frequency is monthly.

Target Value: This measurement shows inventory in number of days supply on hand (DSOH) for finished goods and for production inventory separately. The target value you set should be your goal for the DSOH range. If your goal is to have between ten and twenty days of finished goods on hand, the target values would be 10.0 for the low value and 20.0 for the high value. The default values are set to zero for both the low and high targets. These should be tailored before the measurement is used.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement's inquiry or reports. The default is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiries or printed reports. The default value is ones.

Number of Periods: This measurement shows only history periods. This number must be the maximum of 26 periods.

Cost Calculation Method: The value to be used when expressing inventory dollars. The default for this is the method chosen when Inventory Management was installed (1 - Standard, 2 - Average, 3 - Last). The shipped default is one, standard.

Use Requirements/Planned Orders: If the Material Requirements Planning (MRP) application is installed, and this is answered YES, the Planned Order file and Requirements file is to be used to project inventory requirements when the period close is performed. If MRP is installed and this is answered NO, you will be prompted during Period Close to enter a shipping forecast for each warehouse. If MRP is not installed, this question does not appear. If MPSP is installed and interfacing, demand and planned orders for Master Scheduled items is included.

MPM 15. Excess Inventory Analysis

Measurement Frequency: The frequency for this period should reflect how often your company performs or would like to perform an inventory analysis for excess and obsolete stock on hand. This may already be dictated by company or corporate policy. The default frequency is monthly.

Target Value: The target value you set for this measurement should be considered the acceptable level of excess inventory as a percent of total inventory. The target values are only for total inventory. The measurement for each planner number or planner group shows the value of excess inventory in dollars. When the total parameter is chosen for inquiry or for a printed report, the bar graph shows the excess as a percent of total inventory. The default values are set to zero for both low ‘and high values. These should be tailored before the measurement is used.

Dollar Basis Code: This code specifies the desired unit of measure for any dollar amounts to appear on the measurement’s inquiry or reports. The default is thousands.

Unit Basis Code: The unit basis code governs the unit of measure for the inquiries or printed reports. The default value is ones.

Number of Periods: This measurement only shows history periods. This number must be the maximum of 26 periods.

Cost Calculation Method: The value to be used when expressing inventory dollars. The default for this is the method chosen when Inventory Management was installed (1 - Standard, 2 - Average, 3 - Last). The shipped default is one, standard.

Excess Period Length: There are three excess period lengths to define. The number you assign to each excess period is the number of frequency periods in an excess period. For example, if you define the measurement frequency as monthly, and the length for excess period one as 12, the excess period is 12 months. Excess period two should be longer than excess period one and excess period three should be the longest period. One of the three excess periods should correspond with your company’s official definition of excess inventory. If your official excess inventory definition is on-hand inventory in excess of one years usage, at least one of your excess period lengths should be enough frequency periods to represent a year. The default for excess period one is six, two is 12, and three is 18.

Cycle Counting

Cycle counting is a widely accepted technique of auditing and verifying the accuracy of a company's perpetual inventory records. The technique of cycle counting involves taking a sample group of items and comparing their inventory on-hand balances with the quantity actually found in stock. There are two approaches to this sampling. Each approach serves a different purpose and they are both valid cycle counting techniques.

1. One approach is to use a representative group of items repetitively and draw conclusions about the accuracy of the general population of Inventory records from this sample group.
2. Another approach is to audit sample groups of items on a regular or, if possible, daily basis and rotate, or cycle, all of the inventory population through this sample audit routine during the course of a year. This approach is an attempt to audit and adjust all Inventory records to insure an accurate inventory balance at least once a year.

The technique of counting a representative group of parts and using the results from that group to draw conclusions about the general population is called control group Cycle Counting. Companies should use this approach to identify inventory record accuracy maintenance problems and to validate the effect of corrective actions implemented to correct a problem that was detected by cycle counting. This technique is based on the concept that a representative sample of a large population of items can be used as a more accurate gauge of the total population than a census of the total population. You will find the same problems in maintaining accurate inventory records with this sample group as you would with the general population of items.

One benefit of using a control group for auditing purposes is that the number of items you have to deal with is manageable. The control group should be a small, representative group of items whose balances can be audited often and inaccuracies reconciled. You can use this group to identify problems. This same group can be the test group to see if the actions you are taking to solve these problems are working as expected.

MPA supports Control Group Cycle Counting as well as General Population Cycle Counting. To take advantage of the Inventory Record Accuracy performance measurement (MPM 6), you need to use the Cycle Counting function in this application.

This Cycle Counting function uses all of the same cycle count codes that are used in Inventory Management (IM). It is designed to give you control over when and how items are selected for counting and when to compare actual counts with record balances. You have three count comparisons to choose from as a basis for adjusting the Inventory record if it is inaccurate. You also have the option to leave the record as is and not make any adjustments at all even though the count does not agree with the inventory balance. The three-count process also allows you to verify a first count with a second count and third count, if it is required.

The Inventory Record Accuracy measurement (MPM 6) is updated based on the first count performed in any new counting cycle. A counting cycle is initiated for an item by requesting a first count. This is accomplished when you select items for counting. You must indicate that the items are being selected for their first, second, or third counts. A first count selection zeros out the results of any previous count for each

item selected. Second and third counts cannot be performed unless a first count was made and the record was found to be inaccurate.

You control when the counted quantity versus book balance comparison is made by initiating the Count Posting function. The Count Posting function compares the actual count with the inventory record balance and updates this information in the MPA cycle count files, Item Measurement, or Cycle Count Location file. If the count was a first count, MPA updates the item's accuracy field in the Item Measurement file for non-controlled warehouses and the Cycle Count Location file for controlled warehouses.

To take full advantage of this capability, you should define and adhere to two sets of Cycle Counting cut-off times: a physical movement cut-off, and a transaction update cut-off. It is up to you to define these cut-off times and make sure that they are adhered to. The transaction cutoff time should be timed so that the inventory balances reflect what was on-hand at the time of the physical movement cut-off when the cycle count was performed. You should also take pains to insure that all of the transactions for any inventory movement before the physical movement cutoff are entered and item balances updated before the transaction cut-off time.

You can take multiple, up to three, counts and compare the results of one count with the others. The first count is the count with which the Inventory record accuracy is tested. If the count does not agree with the Inventory record within the cycle count tolerance value, a second count can be made, usually on the next day, to verify the accuracy of the counting activity. If the deviation of the counted quantity from the Inventory record quantity is similar for both the first and the second counts, the count is probably accurate. The record adjustment decision, however, can be based on any one of the three counts.

This Cycle Counting function is a four-step process using MPA (Menu AM7M40).

Step 1 Select the items for cycle counting and print a cycle count list or inventory tickets (Count Select, option 1).

Step 2 Count the selected items and enter the counts (Count Entry, option 2).

Step 3 Compare the counted quantity to the Inventory record quantity and decide if the record is accurate based on the accuracy allowance for the item (Count Posting, option 3). The item measurement is updated.

Step 4 Adjust the inaccurate Inventory records (Inventory Adjust, option 4). This will generate a PH transaction.

If required, steps 2 and 3 may be repeated for second and third counts.

You may select items for cycle counting based on several criteria:

- Warehouse
- Control group
- Item number
- Negative on-hand balance
- Inventory cycle count code
- Stock location
- First count accuracy for second or third counts
- Individual item selection.

These selections are not mutually exclusive. That is, you can use stock location limits to select items that are due to be counted based on their inventory cycle count code. Control group items must be selected separately from noncontrol group items. You

can create multiple control groups by assigning different control group codes to items in the Item Measurement file. Items can be selected for second and third counts based on the accuracy of their first count. If the first count compare found the counted amount to be different than the book value, and the difference is greater than the tolerance allowance, that item is eligible for a second and third count. If you are selecting a control group for a first count, all the items in the control group are selected for counting.

Noncontrol group items can be selected for counting based on several factors at the same time:

- Specific items or a range of items can be selected.
- If the item has a negative on-hand inventory balance, it can be selected.
- If its inventory cycle count code makes it due for counting, it can also be selected.
- Items in a specific stock location or range of stock locations can be selected.
- Items requiring second or third counts due to an inaccurate first count can also be selected.

When you have indicated your selection criteria (Count Select, option 1 on menu AM7M40), you can select a printing sequence by item or location for printing the Cycle Count List (AM7N4) or Inventory Tags (AM7N42) as well as an entry sequence by item or location for the Count Entry display (AM7N11). When the items have been selected for counting, they are held in a batch waiting for actual count results to be entered from Count Entry, option 2 on menu AM7M40. This batch is created to make the count entry process easier. The item number, warehouse, location, and unit of measure for all the selected items do not have to be entered again when the actual counts are entered. Only the counted quantity has to be entered with the date and the initials of the counter. If an item is counted and placed into the batch but was not one of the items selected, you can still enter a count for the item using the Additional Item Entry function (**F01 ADDTNL ENTRIES**) during Cycle Count Entry (AM7N5B). The batch number is important in this process, and is what you use to select the batch for Count Entry and Count Posting. The batch number is printed on the Cycle Count List and the Inventory Tickets. If you print Inventory Tickets, a Cycle Counting List is still printed.

After the actual counts have been entered, they can be compared to the on-hand balances by selecting Count Posting (option 3) from the Cycle Count Menu (AM7M40). This should not be done until the transaction cut-off time since this is the time when the Inventory Balance records should reflect what was in stock at the time of the count. When you initiate Count Posting you must select the entry batch or batches you want. This allows you to have different cut-off times for different stockrooms if required. Each batch could represent a different stockroom. You can delay the Count Posting for certain batches based on their individual cut-off times when cycle count batches are posted in MPA. The count information is posted to MPA's Item Measurement and Cycle Count Location files. The count information remains in these files until Inventory Adjustment, option 4, is completed.

If all of your selected items are accurate, you will not require a second or third count. Be aware that items left "uncounted" (A U in the CU column on a Cycle Count Entry display AM7N5B) will be dropped on the first count. These uncounted items will then be available for other cycle count selections. Once an item is selected for counting, it is not re-selectable for a first count until Inventory Adjustment (option 4) has been completed. Every selected cycle count batch is assigned a system-generated cycle control number on the first count. This count control number appears on the Cycle

Entry Batch Selection (AM7NZ1) and Cycle Count Post Selection (AM7NX1) displays and printed on the Cycle Count Select Edit List (AM7N4), and Cycle Count Post Report (AM7N8). This cycle control number is required for selecting the second and third counts on the Cycle Count Selection display (AM7N11). The cycle control number is also required for selecting which inventory records are to be adjusted on the Cycle Count Adjust Records display (AM7N91). Therefore, you will need to keep your Cycle Count Post Report (AM7N8) or Cycle Count Select Edit List (AM7N4) to enter the correct cycle control number for later counts or inventory adjustment.

You can review Cycle Counting results and make adjustments by selecting Inventory Adjustment (option 4) from the Cycle Count Menu (AM7M40). The first, second, and third count results will be shown to allow you to select the count to use for the Inventory Adjustment (IA) transaction. You are not required to make an adjustment, even if there is a deviation, since you may want to count the item again to insure that the actual count is accurate. Bypass the item on display Cycle Count Adjust Records (AMZN92) when reviewing the count results and no adjustment is required. When you have reviewed all the items, you can update the inventory balances at your discretion by taking **F24 END JOB & POST** on the Cycle Count Adjust Records display (AM7N92). A job will be submitted to the job queue for adjusting inventory balances and cycle count dates in Inventory Management's Item Balance file. A Cycle Count Adjust Records Register (AM7NA) will be printed for a record of the Physical Inventory (PH) transactions. At this point, the Physical Inventory (PH) transactions will be added to Inventory Management's (IM) Transaction History file. To see these history transactions, refer to Inventory Management's Menu Transaction History (AMIM80). Once the history transactions have been added, all the cycle count information in the MPA files will be initialized (Item Measurement file) or removed (Cycle Count Location file). After Inventory Adjustment, items will be available for future selections.

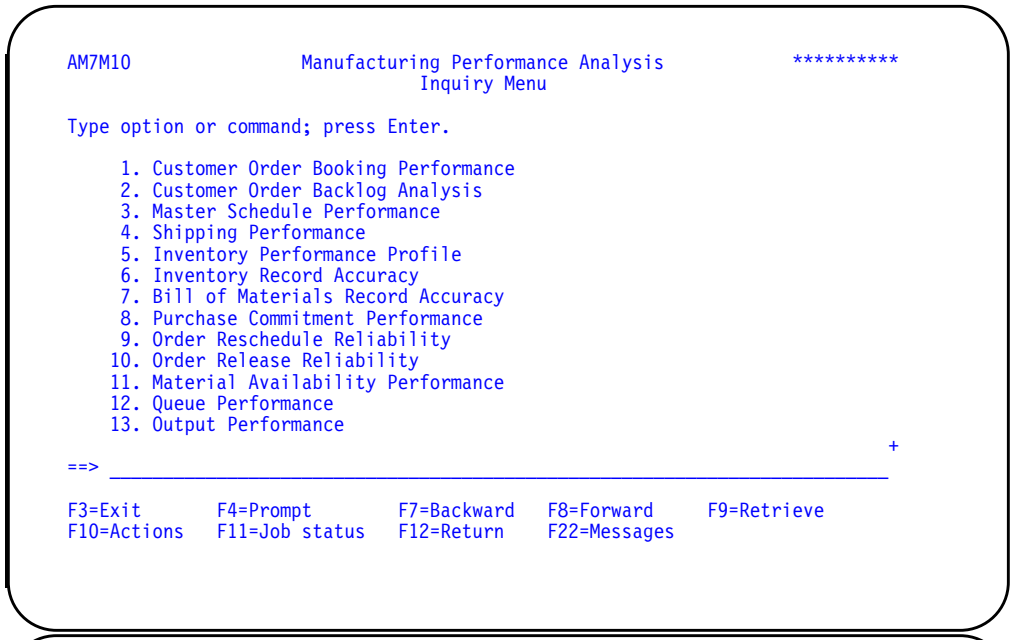
By using Close Simulation, you can stay up-to-date with the results of the cycle counting activity between period closes. The accuracy for a control group can be shown separately, in total with the other control groups, or with the noncontrol group items through inquiry (AM7A61) or by printing (AM7CC) the Inventory Record Accuracy (MPM 6) report.

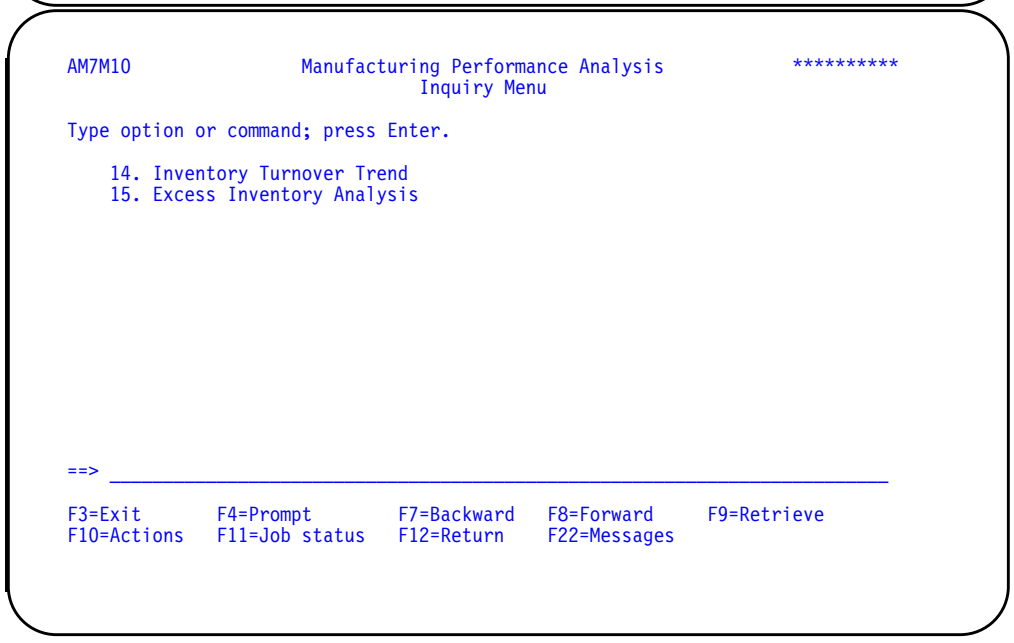
Chapter 3. Inquiry

The Inquiry Menu appears if you select option 1 on the Main Menu.

AM7M10—Inquiry Menu

This menu allows you to select a measurement for viewing current and past performance.





Option 1. Use this option to review current and past customer order booking forecast accuracy for each product model code.

Option 2. Use this option to review the trend of past due customer orders for each model code.

Option 3. Use this option to review current and past production schedule performance for each planner/warehouse.

Option 4. Use this option to review current and past customer order shipping performance for each warehouse.

Option 5. Use this option to review current and past inventory performance for each warehouse.

Option 6. Use this option to review current and past inventory record audit results for each warehouse.

Option 7. Use this option to review current and past bill of material accuracy validation results for each warehouse.

Option 8. Use this option to review current and past purchase order delivery reliability (i.e., level of past due orders) for each planner/warehouse.

Option 9. Use this option to review current and past order due date reliability (i.e., level of past due orders) for each planner/warehouse.

Option 10. Use this option to review current and past order release performance for each planner/warehouse.

Option 11. Use this option to review current and past component part availability performance for each planner/warehouse.

Option 12. Use this option to review current and past work in process queues for each work center.

Note: This option is not available if EPDM is activated.

Option 13. Use this option to review current and past output performance for each work center.

Note: This option is not available if EPDM is activated.

Option 14. Use this option to review current and past inventory turnover performance for each warehouse.

Option 15. Use this option to review current and past levels of inventory in excess of production or shipping demand for each planner/warehouse.

Option 1: Customer Order Booking Performance

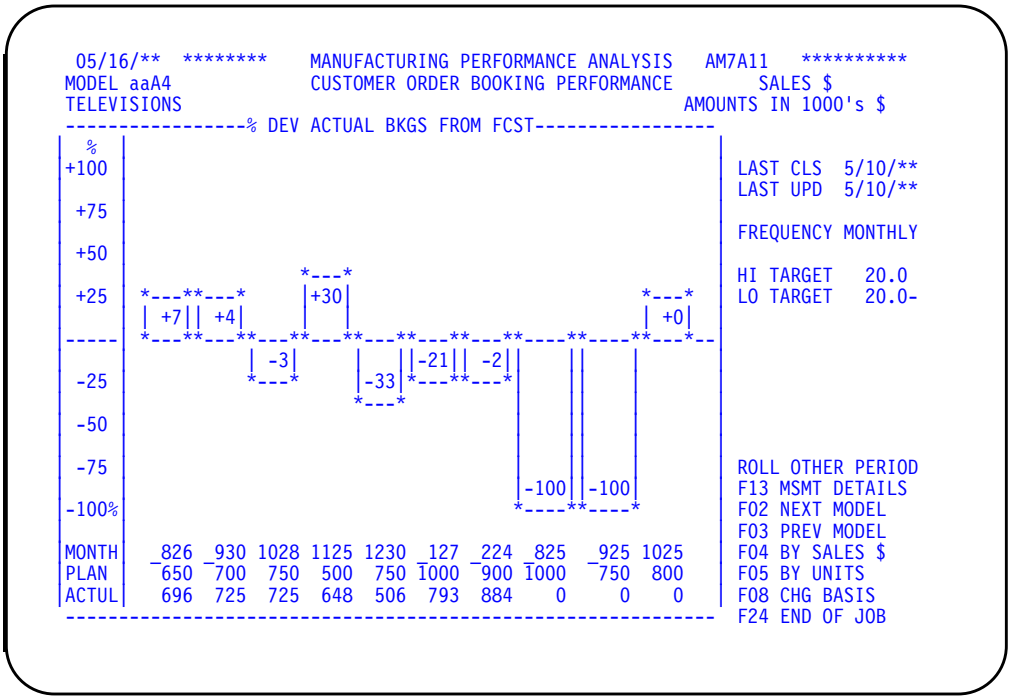
AM7A11—Customer Order Booking Performance–MPM 1

Use this display to review current and past customer order booking forecast accuracy for each product model.

This display appears when you select option 1 on the Inquiry menu. The performance for the first product model appears.

Notes:

1. Flashing fields indicate negative values or values too large for the size of the field. Use **F08 CHG BASIS** for values too large for field size.
2. Month information (MMDD) does not change when the AS/400 date format changes. MMDD is always displayed regardless of the system date displaying as DDMMYY or MMDDYY or YYMMDD.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT MODEL causes performance for the next model to appear.

F03 PREV MODEL (Previous model) causes performance for the previous model to appear.

F04 BY SALES $ (By sales dollars) causes the performance for this model to appear in sales dollars.

F05 BY UNITS causes the performance for this model to appear in units.

F08 CHG BASIS (Change basis) allows the unit of measure for the display to be modified. Enter the basis code for the desired unit of measure after using this function key.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

MODEL. Type in the model code to view the performance for a specific model. The model code defaults to the first model number.

SALES/UNITS. The unit of measure that appears (units or sales $).

AMOUNTS IN $ (Amount in dollars). The dollar unit of measure for this measurement.

LAST CLS (Last close). The date of the last period close for this measurement.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

MONTH. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

PLAN. The forecasted or planned customer order bookings for this model code for each period.

ACTUL (Actual). The actual customer orders booked for this model for each period.

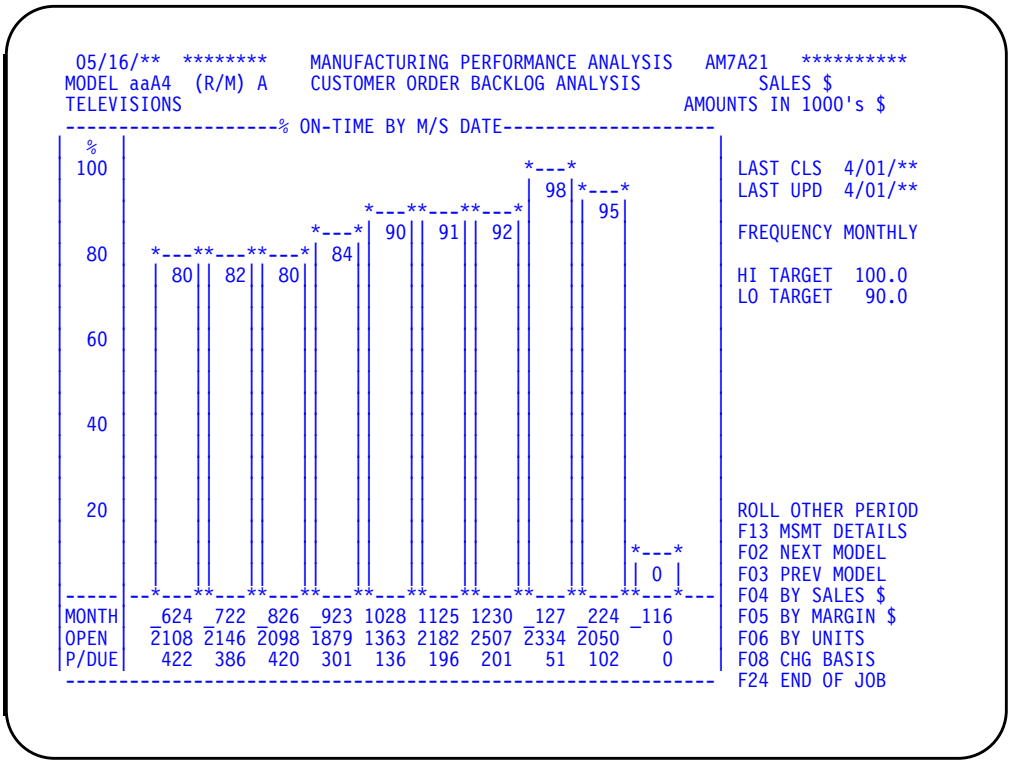
Option 2: Customer Order Backlog Analysis

AM7A21—Customer Order Backlog Analysis–MPM 2

Use this display to review the trend of past due customer orders for each model.

This display appears when you select option 2 on the Inquiry menu. The performance for the first Product Model appears.

Note: Flashing fields indicate negative values or values too large for the size of the field. Use **F08 CHG BASIS** for values too large for field size.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT MODEL causes performance for the next model to appear.

F03 PREV MODEL (Previous model) causes performance for the previous model to appear.

F04 BY SALES $ (By sales dollars) causes the performance for this model to appear in sales dollars.

F05 BY MARGIN $ (By margin dollars) causes the performance for this model to appear in profit margin dollars.

F06 BY UNITS causes the performance for this model to appear in units.

F08 CHG BASIS (Change basis) allows the unit of measure for the display to be modified. Enter the basis code for the desired unit of measure after using this function key.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

MODEL. Type in the model code to view performance for a specific model.

R/M (Request or manufacture). The desired customer order default date for past due performance. The selection defaults to the date selected during measurement tailoring.

M Manufacture schedule date
R Customer order request date

SALES $ (Sales dollars)
UNITS
MARGIN $ (Margin dollars). The unit of measure that appears (units, sales $ or margin $).

AMOUNTS IN $ (Amount in dollars). The dollar unit of measure for this measurement.

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

MONTH. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

OPEN. The total value or number of units on open customer orders for this model code.

P/DUE. The total value or number of units on open customer orders for this model code that are past due.

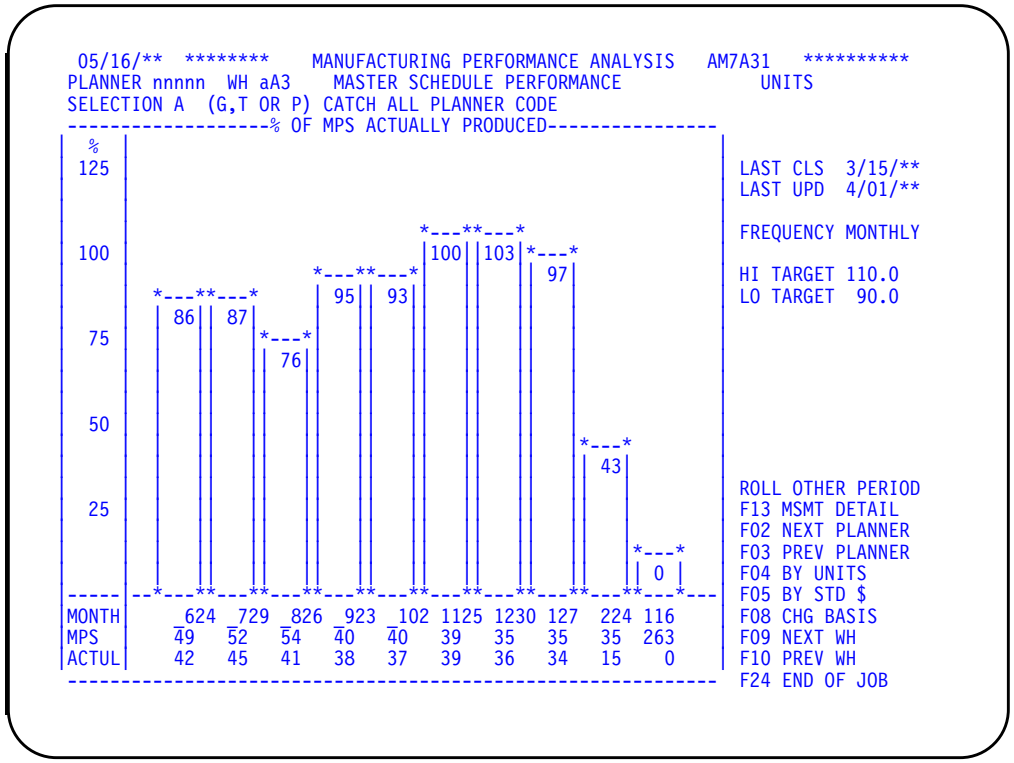
Option 3: Master Schedule Performance

AM7A31—Master Schedule Performance–MPM 3

Use this display to review current and past production schedule performance for each planner/warehouse code.

This display appears when you select option 3 on the Inquiry menu. The performance for the first planner for the first warehouse appears.

Note: Flashing fields indicate negative values or values too large for the size of the field. Use **F08 CHG BASIS** for values too large for field size.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT PLANNER causes performance for the next planner in the same warehouse or planner group to appear.

F03 PREV PLANNER (Previous planner) causes performance for the previous planner in the same warehouse or planner group to appear.

F04 BY UNITS causes the performance for this planner number to appear in units.

F05 BY STD $ (By standard dollars) causes the performance for this planner number to appear in dollars.

F08 CHG BASIS (Change basis) allows the unit of measure for the display to be modified. Enter the basis code for the desired unit of measure after using this function key.

F09 PREV WH/PREV GROUP (Previous warehouse/Previous group) causes performance for the previous warehouse/planner number or group to appear.

F10 NEXT WH/NEXT GROUP (Next warehouse/Next group) causes performance for the next warehouse/planner number or group to appear.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

PLANNER. Performance is shown for this planner or planner group. The first planner in the first warehouse appears as the default.

WH. Type in a warehouse code to view performance for that warehouse. The first warehouse appears as the default.

SELECTION. The type of planner code to view performance for:

G Planner group
P Planner number within warehouse
T Total of all planners for a warehouse (Planner left blank)
Total of all warehouses for a planner (warehouse left blank)

UNITS
STD $ (Standard dollars). The unit of measure that appears (units or standard dollars).

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

MONTH. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

MPS (Master production schedule). The production schedule in units or inventory cost dollars for the items with this planner number.

ACTUL (Actual). The actual production received to stock for the items with this planner number.

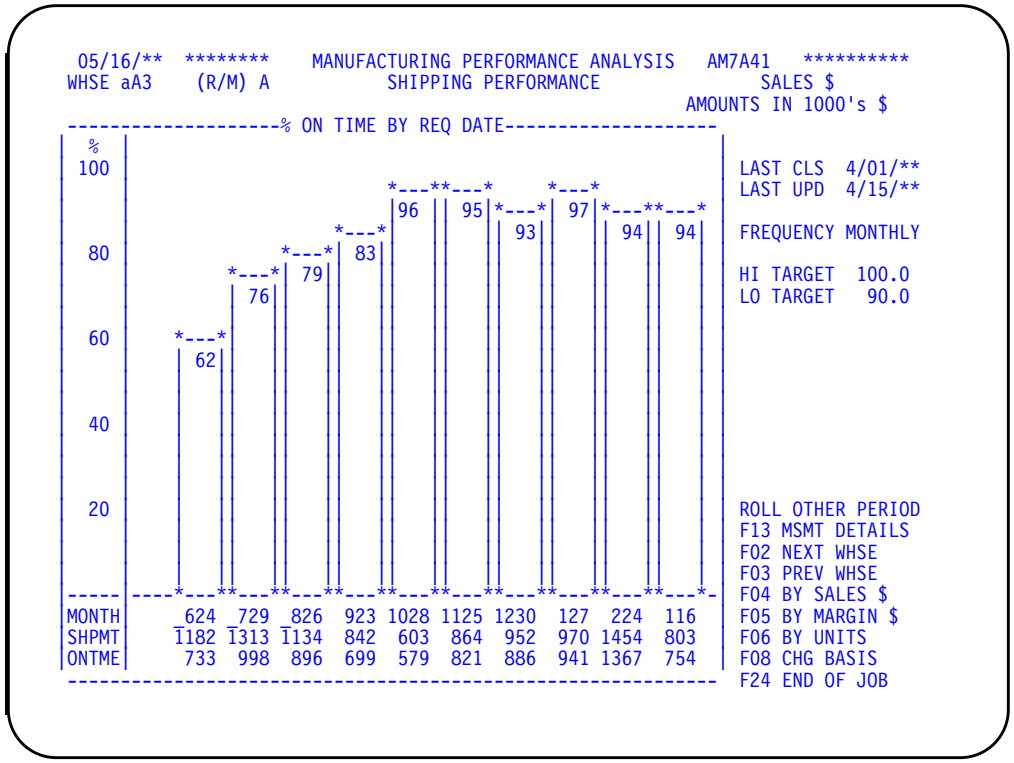
Option 4: Shipping Performance

AM7A41—Shipping Performance–MPM 4

Use this display to review current and past customer order shipping performance for each warehouse.

This display appears when you select option 4 on the Inquiry menu. The performance for the first warehouse appears.

Note: Flashing fields indicate negative values or values too large for the size of the field. Use **F08 CHG BASIS** for values too large for field size.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT WHSE (Next warehouse) causes performance for the next warehouse to appear.

F03 PREV WHSE (Previous warehouse) causes performance for the previous warehouse to appear.

F04 BY SALES $ (By sales dollars) causes the performance for this warehouse to appear in sales dollars.

F05 BY MARGIN $ (By margin dollars) causes the performance for this warehouse to appear in profit margin dollars.

F06 BY UNITS causes the performance for this warehouse to appear in units.

F08 CHG BASIS (Change basis) allows the unit of measure for the display to be modified. Enter the basis code for the desired unit of measure after using this function key.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

WHSE (Warehouse). Type in a warehouse code to view performance for that warehouse. The first warehouse appears as the default.

R/M (Request or manufacture). The desired customer order default date for past-due performance. The selection defaults to the date selected during measurement tailoring.

M Manufacture schedule date
R Request date

SALES $ (Sales dollars)
UNITS. Designates whether sales dollars or units appear on the display.

AMOUNTS IN $ (Amounts in dollars)
AMOUNTS IN UNITS. The unit of measure for this measurement ($ or UNITS).

LAST CLS (Last close). The last date this measurement was closed.

LAST UPD (Last update). The last date this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

MONTH. The date this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

SHPMT (Shipment). The total shipments for this warehouse for each period.

ONTME (On time). The on-time shipments for this warehouse for each period.

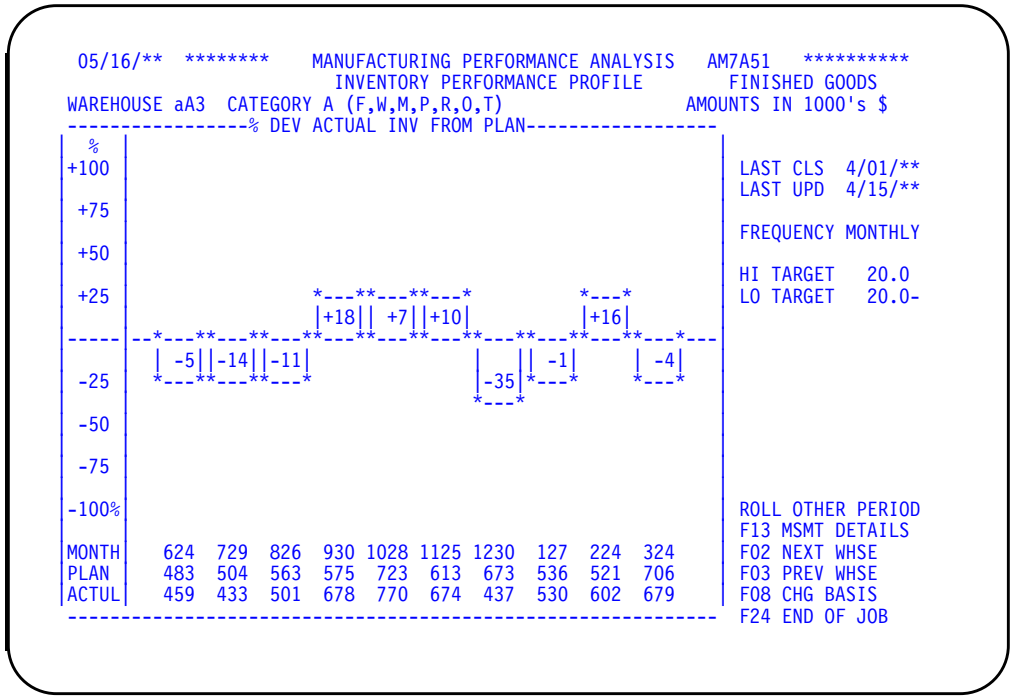
Option 5: Inventory Performance Profile

AM7A51—Inventory Performance Profile—MPM 5

Use this display to review current and past inventory performance for each warehouse.

This display appears when you select option 5 on the Inquiry menu. The performance for the first warehouse appears.

Note: Flashing fields indicate negative values or values too large for the size of the field. Use **F08 CHG BASIS** for values too large for field size.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT WHSE (Next warehouse) causes performance for the next warehouse to appear.

F03 PREV WHSE (Previous warehouse) causes performance for the previous warehouse to appear.

F08 CHG BASIS (Change basis) allows the unit of measure for the display to be modified. Enter the basis code for the desired unit of measure after using this function key.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

WAREHOUSE. Type in a warehouse code to view performance for that warehouse. The first warehouse appears as the default.

CATEGORY. The inventory category for which you want to view performance. This is based on item type code and finished goods code. The codes are:

F Finished goods Item
M Manufactured items
O Other items
P Purchased items
R Raw material items
T Total inventory
W Work in process

FINISHED GOODS. The inventory category being shown. The category can be any of the finished goods code or item type code.

AMOUNTS IN $ (Amounts in dollars). The dollar unit of measure for this measurement.

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

MONTH. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

PLAN. The planned inventory level for this inventory category.

ACTUL (Actual). The actual inventory level for this inventory category.

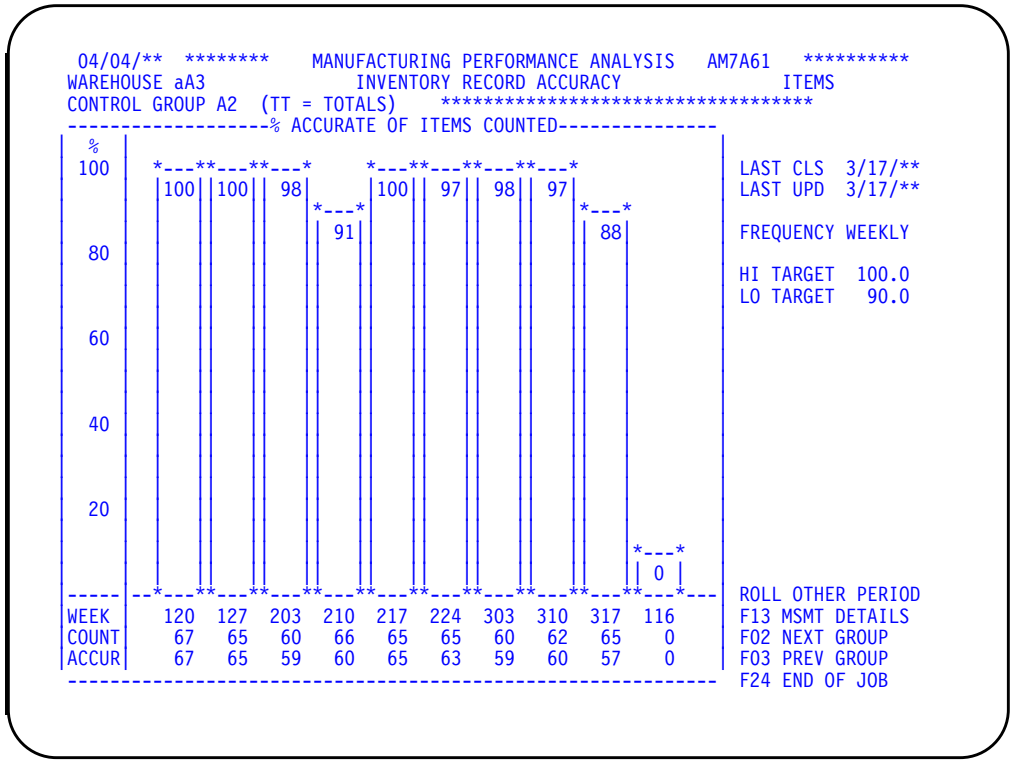
Option 6: Inventory Record Accuracy

AM7A61—Inventory Record Accuracy–MPM 6

Use this display to review current and past inventory record audit results for each warehouse.

This display appears when you select option 6 on the Inquiry menu. The performance for the first warehouse appears.

Note: Flashing fields indicate negative values or values too large for the size of the field.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT GROUP causes performance for the next control group to appear.

F03 PREV GROUP (Previous group) causes performance for the previous group to appear.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

WAREHOUSE. The warehouse code on which you selected to view performance.

CONTROL GROUP. The control group code being shown. Enter **TT** to view total performance for all control groups and noncontrol group items. If you do not enter either a control group code or TT, performance for the general population (noncontrol group items) appears.

ITEMS. The unit of measure for this performance is item numbers.

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

WEEK. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

COUNT. The number of item numbers audited during each period.

ACCUR (Accuracy). The number of item numbers audited with accurate inventory balance records during each period.

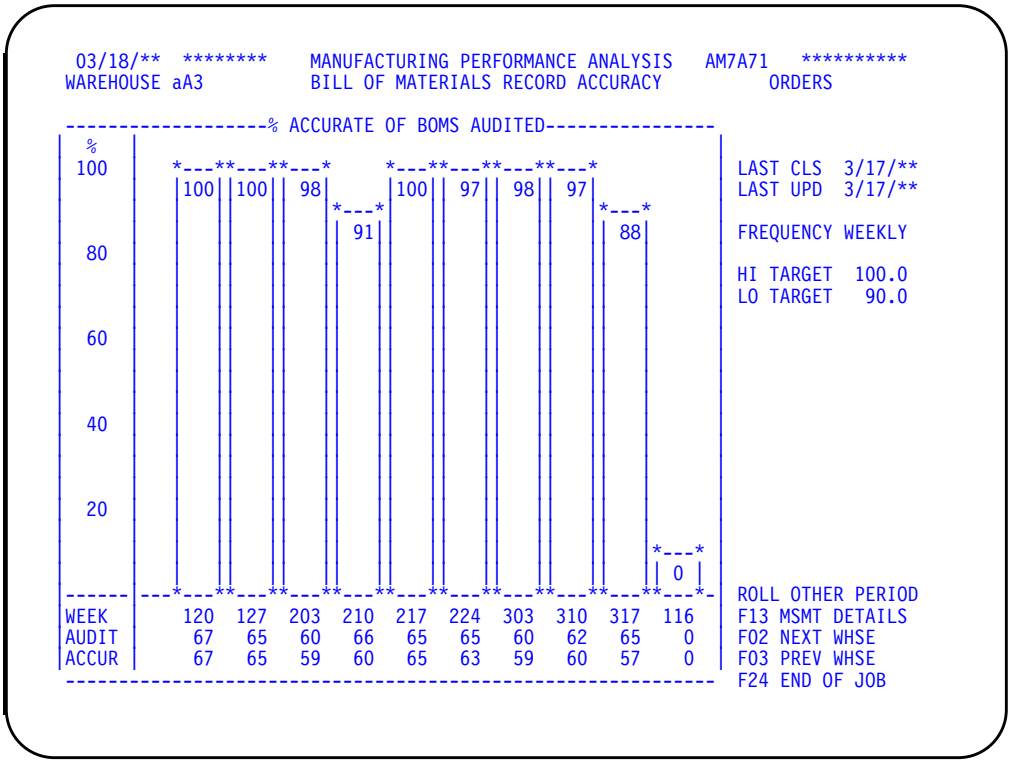
Option 7: Bill of Materials Record Accuracy

AM7A71—Bill of Materials Record Accuracy–MPM 7

Use this display to review current and past bill of materials accuracy validation results for each warehouse.

This display appears when you select option 7 on the Inquiry menu. The performance for the first warehouse appears.

Note: Flashing fields indicate negative values or values too large for the size of the field.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT WHSE (Next warehouse) causes performance for the next warehouse to appear.

F03 PREV WHSE (Previous warehouse) causes performance for the previous warehouse to appear.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

WAREHOUSE. The warehouse code to look at performance for a specific warehouse. The first warehouse appears as the default.

ORDERS. The unit of measure for this measurement is number of orders closed.

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

WEEK. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

AUDIT. The number of bills of material audited during each period.

ACCUR (Accuracy). The number of bills of material audited with accurate component usage.

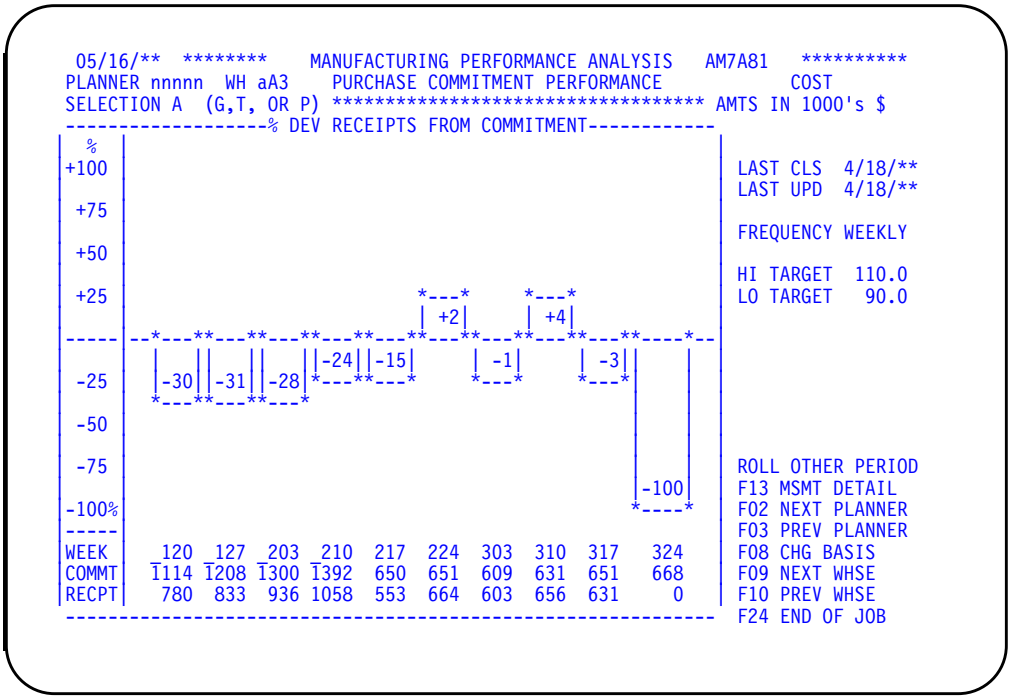
Option 8: Purchase Commitment Performance

AM7A81—Purchase Commitment Performance–MPM 8

Use this display to review current and past purchase order delivery reliability for each planner.

This display appears when you select option 8 on the Inquiry menu. The performance for the first planner/warehouse code appears.

Note: Flashing fields indicate negative values or values too large for the size of the field. Use **F08 CHG BASIS** for values too large for field size.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT PLANNER causes performance for the next planner in the same warehouse or planner group to appear.

F03 PREV PLANNER (Previous planner) causes performance for the previous planner in the same warehouse or planner group to appear.

F08 CHG BASIS (Change basis) allows the unit of measure for the display to be modified. Enter the basis number for the desired unit of measure after using this function key.

F09 PREV WH/PREV GROUP (Previous warehouse/Previous group) causes performance for the previous warehouse/planner number or group to appear.

F10 NEXT WH/NEXT GROUP (Next warehouse/Next group) causes performance for the next warehouse/planner number or group to appear.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

PLANNER. Performance is shown for this planner or planner group. The first planner in the first warehouse appears as the default.

WH. Type in a warehouse code to view performance for that warehouse. The first warehouse appears as the default.

SELECTION. The type of planner number to view performance for:

G	Planner group
P	Planner number within warehouse
T	Total of all planner numbers for a warehouse (Planner left blank) Total of all warehouses for a planner (warehouse left blank)

COST. The unit of measure that is being shown is inventory cost dollars.

AMT IN $. The dollar unit of measure for this measurement.

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

WEEK. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

COMMT (Committed). The inventory cost value for the open purchase orders due to stock during each period.

RECPT (Receipts). The actual purchase receipts to stock during each period.

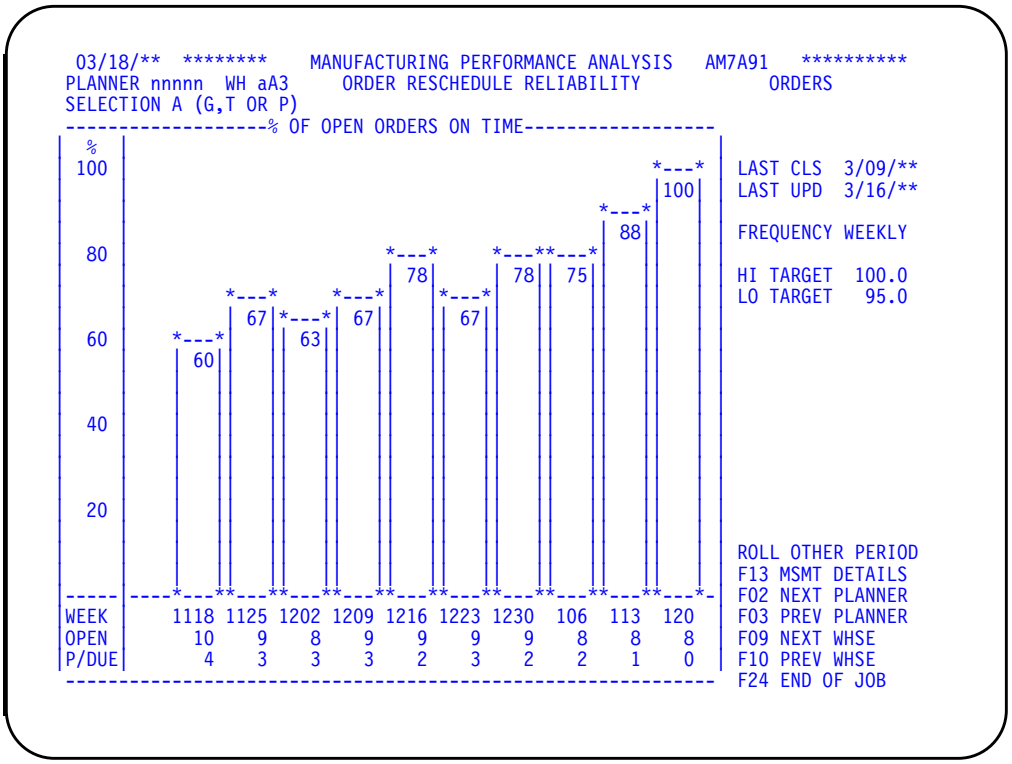
Option 9: Order Reschedule Reliability

AM7A91—Order Reschedule Reliability–MPM 9

Use this display to review current and past order due date reliability for each planner.

This display appears when you select option 9 on the Inquiry menu. The performance for the first Planner/warehouse code appears.

Note: Flashing fields indicate negative values or values too large for the size of the field.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT PLANNER causes performance for the next planner in the same warehouse or planner group to appear.

F03 PREV PLANNER (Previous planner) causes performance for the previous planner in the same warehouse or group to appear.

F09 PREV WH/PREV GROUP (Previous warehouse/Previous group) causes performance for the previous warehouse/planner number or group to appear.

F10 NEXT WH/NEXT GROUP (Next warehouse/Next group) causes performance for the next warehouse/planner number or group to appear.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

PLANNER. Performance is shown for this planner or planner group. The first planner in the first warehouse appears as the default.

WH. Type in a warehouse code to view performance for that warehouse. The first warehouse appears as the default.

SELECTION. The type of planner number to view performance for:

G Planner group
P Planner number within warehouse
T Total of all planner numbers for a warehouse (Planner left blank)
Total of all warehouses for a planner (warehouse left blank)

ORDERS. The unit of measure is the number of orders.

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

WEEK. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

OPEN. The number of open orders with this planner number.

P/DUE (Past due). The number of open orders with this planner number that are past due.

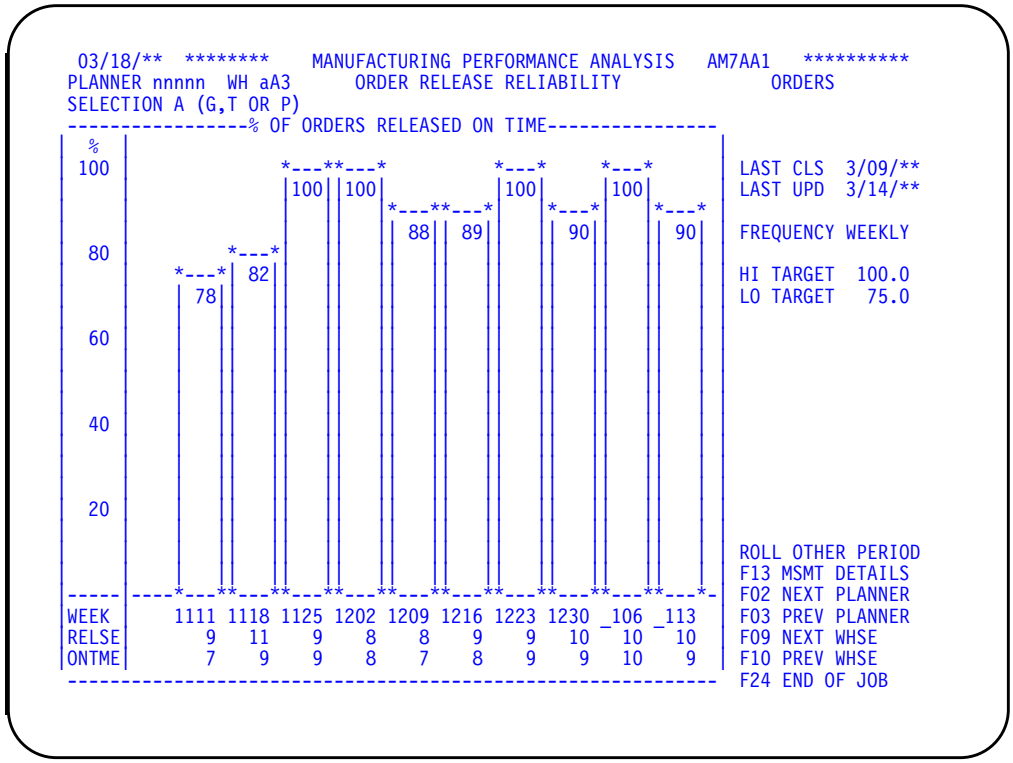
Option 10: Order Release Reliability

AM7AA1—Order Release Reliability–MPM 10

Use this display to review current and past order release performance for each planner.

This display appears when you select option 10 on the Inquiry menu. The performance for the first planner/warehouse code appears.

Note: Flashing fields indicate negative values or values too large for the size of the field.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT PLANNER causes performance for the next planner in the same warehouse or planner group to appear.

F03 PREV PLANNER (Previous planner) causes performance for the previous planner in the same warehouse or group to appear.

F09 PREV WH/PREV GROUP (Previous warehouse/Previous group) causes performance for the previous warehouse/planner number or group to appear.

F10 NEXT WH/NEXT GROUP (Next warehouse/Next group) causes performance for the next warehouse/planner number or group to appear.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

PLANNER. Performance is shown for this planner or planner group. The first planner in the first warehouse appears as the default.

WH. Type in a warehouse code to view performance for that warehouse. The first warehouse appears as the default.

SELECTION. The type of planner number to view performance for:

G Planner group
P Planner number within warehouse
T Total of all planner numbers for a warehouse (Planner left blank)
Total of all warehouses for a planner (warehouse left blank)

ORDERS. The unit of measure is the number of orders.

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

WEEK. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

RELSE (Release). The number of orders released during each period with this planner number.

ONTME (On time). The number of orders released on time during each period with this planner number.

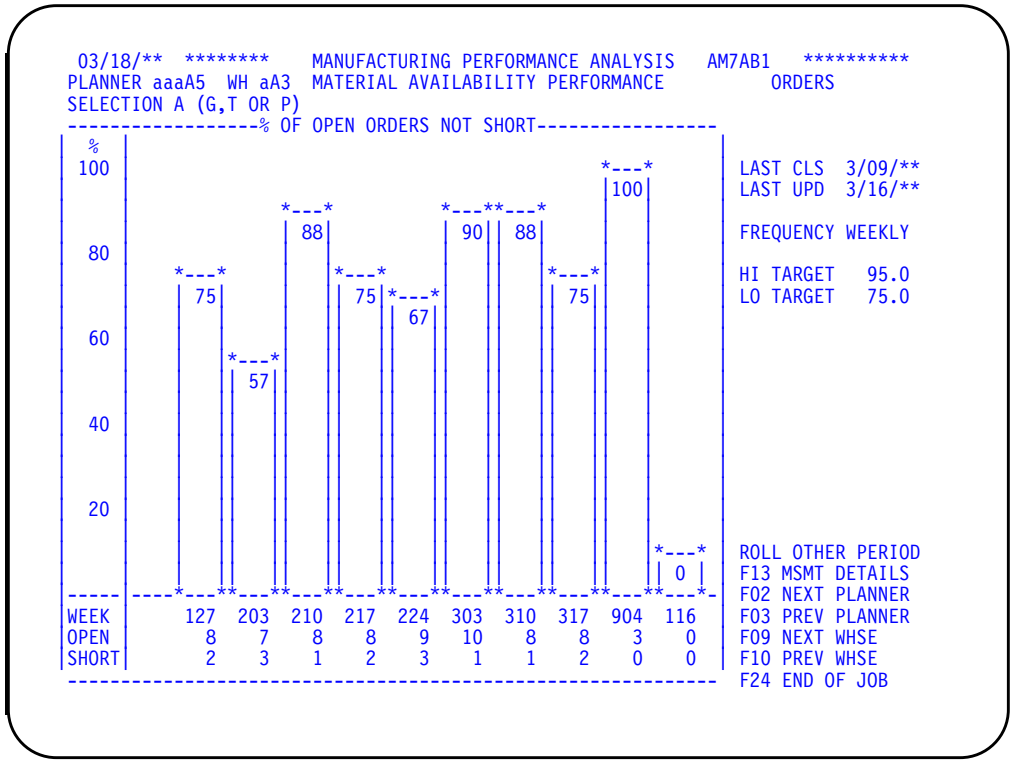
Option 11: Material Availability Performance

AM7AB1—Material Availability Performance–MPM 11

Use this display to review current and past component part availability performance for each planner.

This display appears when you select option 11 on the Inquiry menu. The performance for the first planner/warehouse code appears.

Note: Flashing fields indicate negative values or values too large for the size of the field.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT PLANNER causes performance for the next planner in the same warehouse or planner group to appear.

F03 PREV PLANNER (Previous planner) causes performance for the previous planner in the same warehouse or group to appear.

F09 PREV WH/PREV GROUP (Previous warehouse/Previous group) causes performance for the previous warehouse/planner number or group to appear.

F10 NEXT WH/NEXT GROUP (Next warehouse/Next group) causes performance for the next warehouse/planner number or group to appear.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

PLANNER. Performance is shown for this planner or planner group. The first planner in the first warehouse appears as the default.

WH. Type in a warehouse code to view performance for that warehouse. The first warehouse appears as the default.

SELECTION. The type of planner number to view performance for:

G Planner group
P Planner number within warehouse
T Total of all planner numbers for a warehouse (Planner left blank)
Total of all warehouses for a planner (warehouse left blank)

ORDERS. The unit of measure is the number of orders.

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

WEEK. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

OPEN. The number of open orders with this planner number.

SHORT. The number of open orders with this planner number that are short component parts.

Option 12: Queue Performance

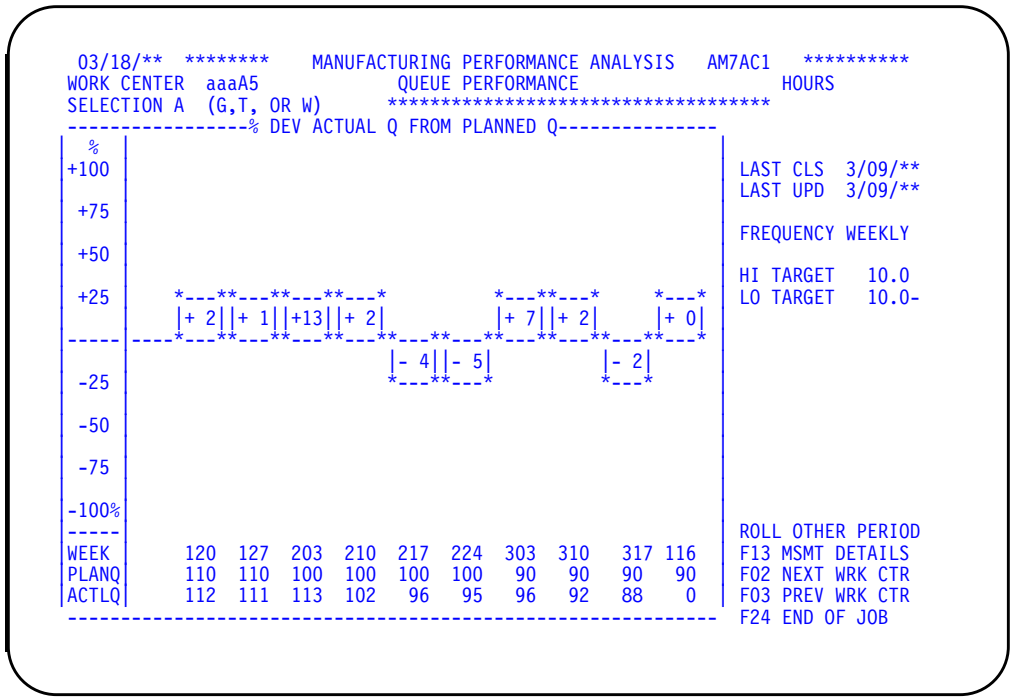
Note: This option is not available if EPDM is activated.

AM7AC1—Queue Performance–MPM 12

Use this display to review current and past work in process queues for each work center.

This display appears when you select option 12 on the Inquiry menu. The performance for the first work center appears.

Note: Flashing fields indicate negative values or values too large for the size of the field.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT WRK CTR (Next work center) causes performance for the next work center or work center group to appear.

F03 PREV WRK CTR (Previous work center) causes performance for the previous work center or work center group to appear.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

WORK CENTER. Performance is shown for this work center or work center group. The first work center appears as the default.

SELECTION. The type of group code to view performance for:

G Work center group
T Total of all work centers
W Work center

HOURS. The unit of measure is standard hours of queue time.

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

WEEK. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

PLANQ (Planned queue). The planned queue for this work center for each period.

ACTLQ (Actual queue). The actual queue for this work center for each period.

Option 13: Output Performance

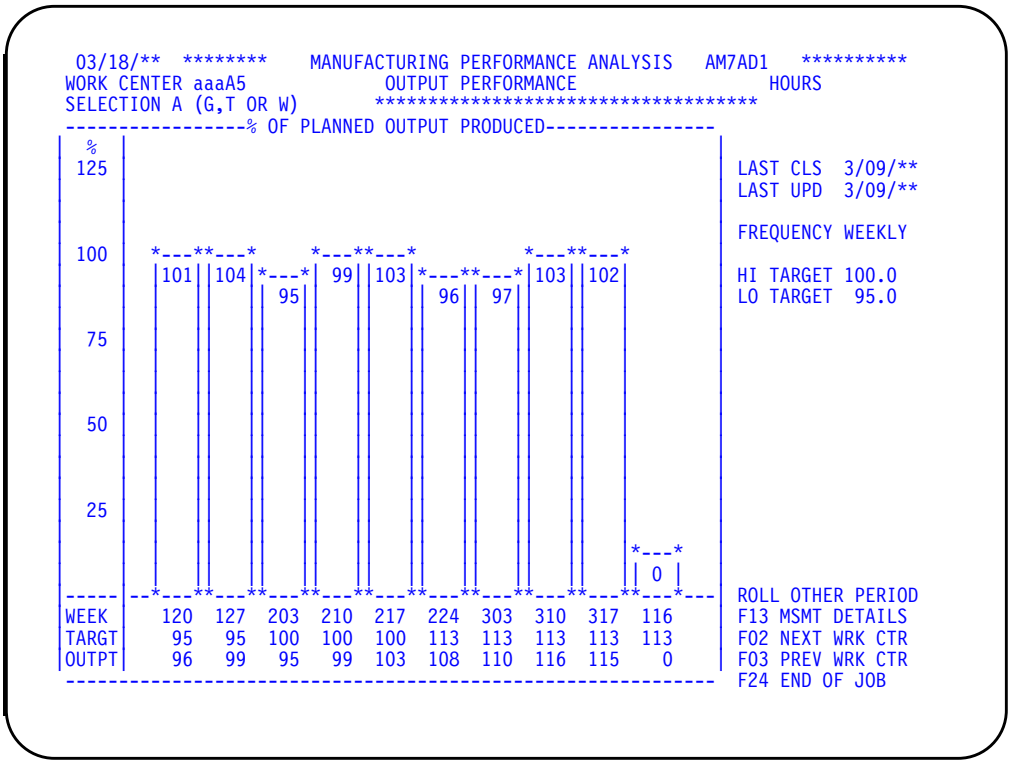
Note: This option is not available if EPDM is activated.

AM7AD1—Output Performance–MPM 13

Use this display to review current and past output performance for each work center.

This display appears when you select option 13 on the Inquiry menu. The performance for the first work center appears.

Note: Flashing fields indicate negative values or values too large for the size of the field.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT WRK CTR (Next work center) causes performance for the next work center to appear.

F03 PREV WRK CTR (Previous work center) causes performance for the previous work center to appear.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

WORK CENTER. Performance is shown for this work center or work center group. The first work center appears as the default.

SELECTION. The type of group code to view performance for:

G Work center group
T Total of all work centers
W Work center

HOURS. The unit of measure is standard hours of work center output.

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

WEEK. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

TARGT (Target). The planned output in standard hours for each period, based on work center capacity.

OUTPT (Output). The actual output in standard hours for each period, based on standard hours in the routing.

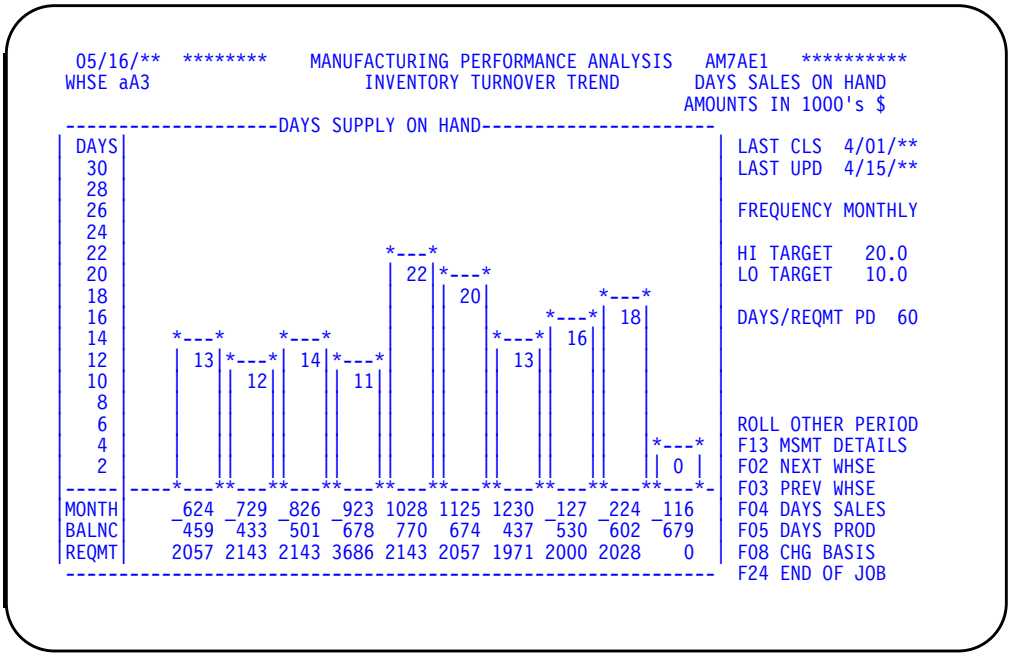
Option 14: Inventory Turnover Trend

AM7AE1—Inventory Turnover Trend–MPM 14

Use this display to review current and past inventory turnover performance for each warehouse.

This display appears when you select option 14 on the Inquiry menu. The performance for the first warehouse appears.

Note: Flashing fields indicate negative values or values too large for the size of the field. Use **F08 CHG BASIS** for values too large for field size.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT WHSE (Next warehouse) causes performance for the next warehouse to appear.

F03 PREV WHSE (Previous warehouse) causes performance for the previous warehouse to appear.

F04 DAYS SALES causes days of supply to be shown for finished goods inventory.

F05 DAYS PROD (Days production) causes days of supply to be shown for production inventory.

F08 CHG BASIS (Change basis) allows the unit of measure for the display to be modified. Enter the basis code for the desired unit of measure after using this function key.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

WHSE (Warehouse). The performance is displayed for this selected warehouse. Type in the warehouse code desired.

DAYS SALES ON HAND
DAYS PROD ON HAND. The unit of measure is days supply on hand of finished goods (SALES) or production inventory (PROD).

AMOUNTS IN $ (Amounts in dollars). The dollar unit of measure for this measurement.

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

DAYS/REQMT PD. The number of days supply on hand for this warehouse and inventory category (production or finished goods).

MONTH. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

BALNC (Balance). The actual inventory cost value of Finished Goods or production inventory for each period.

REQMT (Requirement). The inventory cost value of three excess periods of planned production or expected shipments.

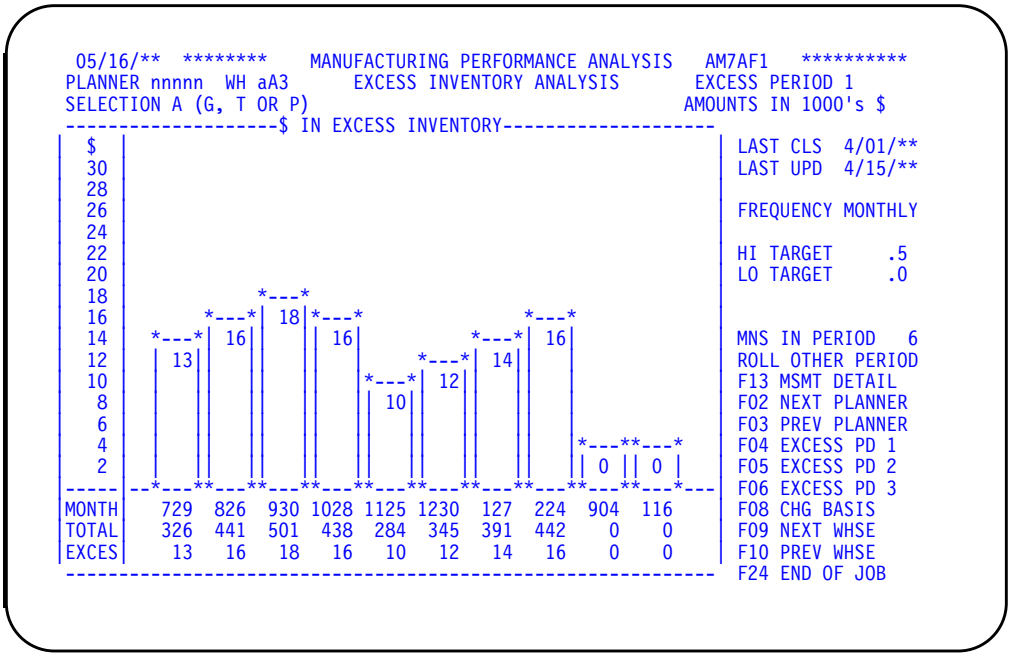
Option 15: Excess Inventory Analysis

AM7AF1—Excess Inventory Analysis–MPM 15

Use this display to review current and past levels of inventory in excess of production or shipping demand for each planner/warehouse.

This display appears when you select option 15 on the Inquiry menu. The performance for the first planner/warehouse appears.

Note: Flashing fields indicate negative values or values too large for the size of the field. Use **F08 CHG BASIS** for values too large for field size.



Function keys

ROLL OTHER PERIOD. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to view additional performance periods.

F13 MSMT DETAILS (Help measurement details). Use the **F13** key to show the measurement's purpose and description.

F02 NEXT PLANNER causes performance for the next planner in the same warehouse or planner group to appear.

F03 PREV PLANNER (Previous planner) causes performance for the previous planner in the same warehouse or group to appear.

F04 EXCESS PD 1 (Excess period 1) causes performance against excess period 1 to appear.

F05 EXCESS PD 2 (Excess period 2) causes performance against excess period 2 to appear.

F06 EXCESS PD 3 (Excess period 3) causes performance against excess period 3 to appear.

F08 CHG BASIS (Change basis) allows the unit of measure for the display to be modified. Enter the basis code for the desired unit of measure after using this function key.

F09 PREV WH/PREV GROUP (Previous warehouse/Previous group) causes performance for the previous warehouse/planner number or group to appear.

F10 NEXT WH/NEXT GROUP (Next warehouse/Next group) causes performance for the next warehouse/planner number or group to appear.

F24 END OF JOB causes the Inquiry menu to appear.

Fields

PLANNER. Performance is shown for this planner or planner group. The first planner in the first warehouse appears as the default.

WH. Type in a warehouse code to view performance for that warehouse. The first warehouse appears as the default.

SELECTION. The type of planner number to view performance for:

G Planner group
P Planner number within warehouse
T Total of all planner numbers for a warehouse (planner left blank
Total of all warehouses for a planner (warehouse left blank)

EXCESS PERIOD. The excess period being shown.

AMOUNTS IN $ (Amounts in dollars). The dollar unit of measure for this measurement.

LAST CLS (Last close). The last date that this measurement was closed.

LAST UPD (Last update). The last date that this measurement was updated using Close Simulation.

FREQUENCY. The frequency that this measurement is closed and the performance period length.

HI TARGET (High target). The high performance goal set for this measurement.

LO TARGET (Low target). The low performance goal set for this measurement.

MNS IN PERIOD (Months in period). The number of frequency periods in this excess period as relates to ***FREQUENCY***. The MNS on this display may be replaced by any of the following depending on the frequency.

DYS Days
MNS Months
QTR Quarters
WKS Weeks
2WK Biweeks

4WK Quadweeks

MONTH. The date that this measurement was closed for each measurement period. The date shown is only the month and day. For example, December 24 is shown as 1224. This represents the end of the frequency period. The frequency description is shown.

TOTAL. The value of total on hand inventory for this planner or planner group.

EXCES (Excess). The value of the excess inventory for this excess period for this planner or planner group.

Chapter 4. Reports

The Reports Menu appears when you select option 2 on the Main Menu. The following options are used:

Note: To print any performance measurements, you must route the report to a printer capable of printing in compressed print mode (198-character width).

AM7M20—Reports Menu

This menu allows you to select a measurement for printing reports of current and past performance.

```
AM7M20                Manufacturing Performance Analysis            **********
                                 Reports Menu

Type option or command; press Enter.

     1. Customer Order Booking Performance
     2. Customer Order Backlog Analysis
     3. Master Schedule Performance
     4. Shipping Performance
     5. Inventory Performance Profile
     6. Inventory Record Accuracy
     7. Bill of Materials Record Accuracy
     8. Purchase Commitment Performance
     9. Order Reschedule Reliability
    10. Order Release Reliability
    11. Material Availability Performance
    12. Queue Performance
    13. Output Performance
                                                                            +
==> ____________________________________________________________________________

F3=Exit       F4=Prompt       F7=Backward   F8=Forward     F9=Retrieve
F10=Actions   F11=Job status   F12=Return    F22=Messages
```

```
AM7M20                Manufacturing Performance Analysis            **********
                                 Reports Menu

Type option or command; press Enter.

    14. Inventory Turnover Trend
    15. Excess Inventory Analysis









==> ____________________________________________________________________________

F3=Exit       F4=Prompt       F7=Backward   F8=Forward     F9=Retrieve
F10=Actions   F11=Job status   F12=Return    F22=Messages
```

Option 1. Use this option to print the Customer Order Booking Performance Measurement.

Option 2. Use this option to print the Customer Order Backlog Analysis Measurement.

Option 3. Use this option to print the Master Schedule Performance Measurement.

Option 4. Use this option to print the Shipping Performance Measurement.

Option 5. Use this option to print the Inventory Performance Profile Measurement.

Option 6. Use this option to print the Inventory Record Accuracy Measurement.

Option 7. Use this option to print the Bill of Material Accuracy Measurement.

Option 8. Use this option to print the Purchase Commitment Performance Measurement.

Option 9. Use this option to print the Order Reschedule Reliability Performance Measurement.

Option 10. Use this option to print the Order Release Reliability Performance Measurement.

Option 11. Use this option to print the Material Availability Performance Measurement.

Option 12. Use this option to print the Queue Performance Measurement.

Note: This option is not available if EPDM is activated.

Option 13. Use this option to print the Output Performance Measurement.

Note: This option is not available if EPDM is activated.

Option 14. Use this option to print the Inventory Turnover Trend Measurement.

Option 15. Use this option to print the Excess Inventory Analysis Measurement.

Contents | Index | Exit

Option 1: Customer Order Booking Performance

AM7C11—Customer Order Booking Performance–Report Options–MPM 1

This display shows the report selection options for printing the Customer Order Booking Performance (MPM 1).

This display appears when you select option 1 on the Reports menu.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7C11    **********
                      CUSTOMER ORDER BOOKING PERFORMANCE
MPM 001                         REPORT OPTIONS

                             MEASUREMENT PURPOSE
              **************************************************
              **************************************************

                          FROM MODEL aaA4  TO MODEL aaA4

                          PRINT SALES $    A  (Y OR N)

                          PRINT UNITS      A  (Y OR N)




                                                          F24 CANCEL JOB
```

Function keys

F24 CANCEL JOB causes the application to cancel printing reports after period close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM MODEL
TO MODEL. Enter the model code range for which you want the measurement printed. If you leave these fields blank, a report is printed for each model code.

PRINT SALES $ (Y OR N) (Print sales dollars). Enter **Y** or **N** to indicate if you want the measurement printed in sales dollars.

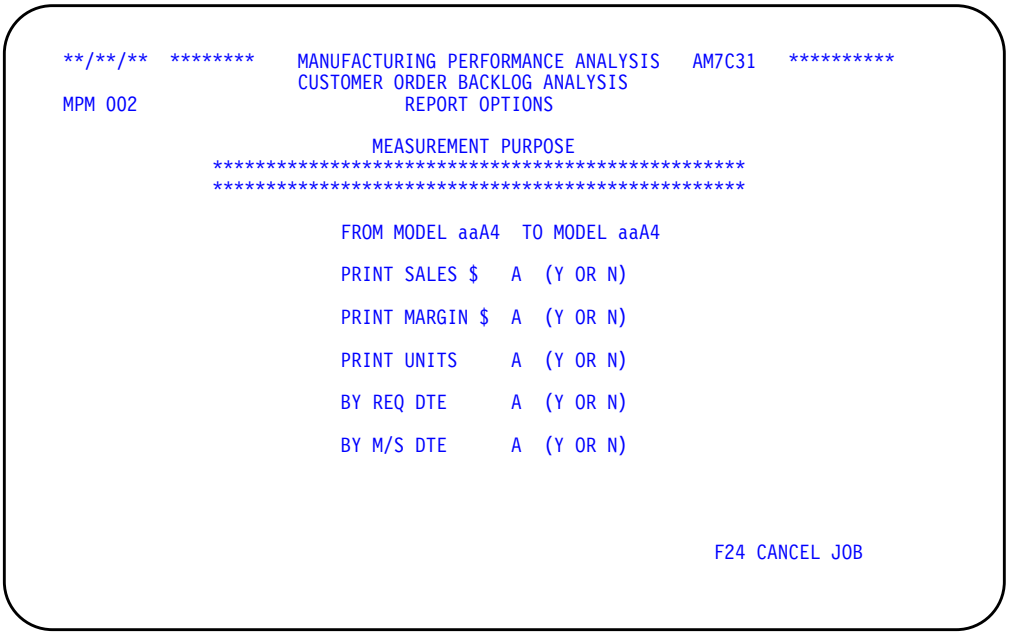
PRINT UNITS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed in units.

Option 2: Customer Order Backlog Analysis

AM7C31—Customer Order Backlog Analysis–Report Options–MPM 2

This display shows the report selection options for printing the Customer Order Backlog Analysis (MPM 2).

This display appears when you select option 2 on the Reports menu.



Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM MODEL
TO MODEL. Enter the model code range limits. If you leave these fields blank, a report is printed for all models.

PRINT SALES $ (Y OR N) (Print sales dollars). Enter **Y** or **N** to indicate if you want the measurement printed in sales dollars.

PRINT MARGIN $ (Y OR N) (Print margin dollars). Enter **Y** or **N** to indicate if you want the measurement printed in profit margin dollars.

PRINT UNITS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed in units.

BY REQ DTE (Y OR N) (By request date). Enter **Y** or **N** to indicate if you want to use the request date as the customer order due date.

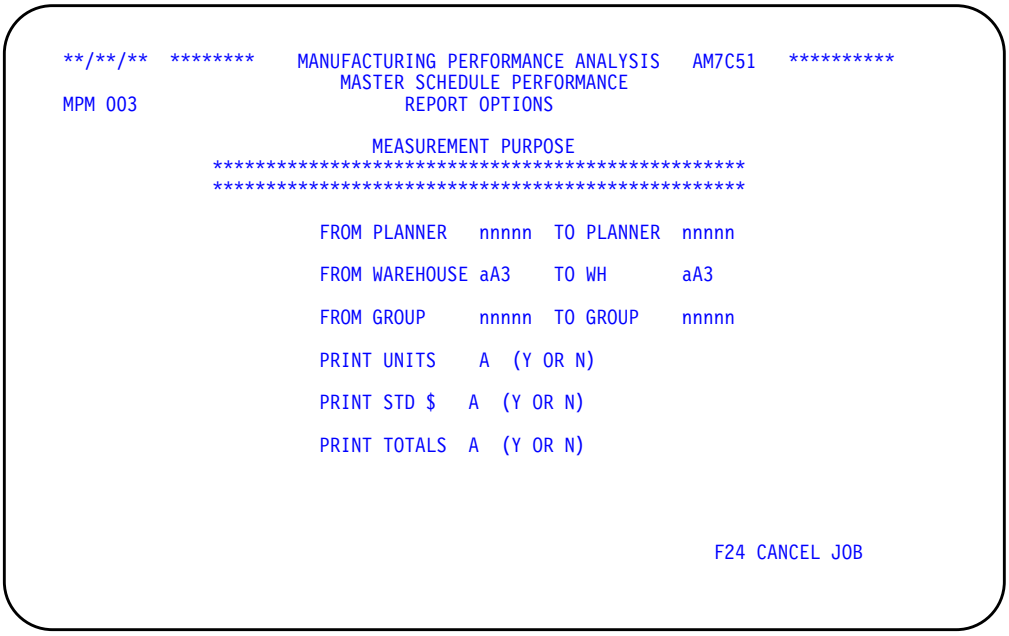
BY M/S DTE (Y OR N) (By manufacture schedule date). Enter **Y** or **N** to indicate if you want to use the manufacture schedule date as the customer order due date.

Option 3: Master Schedule Performance

AM7C51—Master Schedule Performance–Report Options–MPM 3

This display shows the report selection options for printing the Master Schedule Performance (MPM 3).

This display appears when you select option 3 on the Reports menu.



Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM PLANNER
TO PLANNER. Enter the range limits. If you leave these fields blank, all planners are printed.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

FROM GROUP
TO GROUP. Enter the range limits. If you leave these fields blank, all planner groups are printed.

PRINT UNITS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed in units.

PRINT STD $ (Y OR N) (Print standard dollars). Enter **Y** or **N** to indicate if you want the measurement printed in inventory cost dollars.

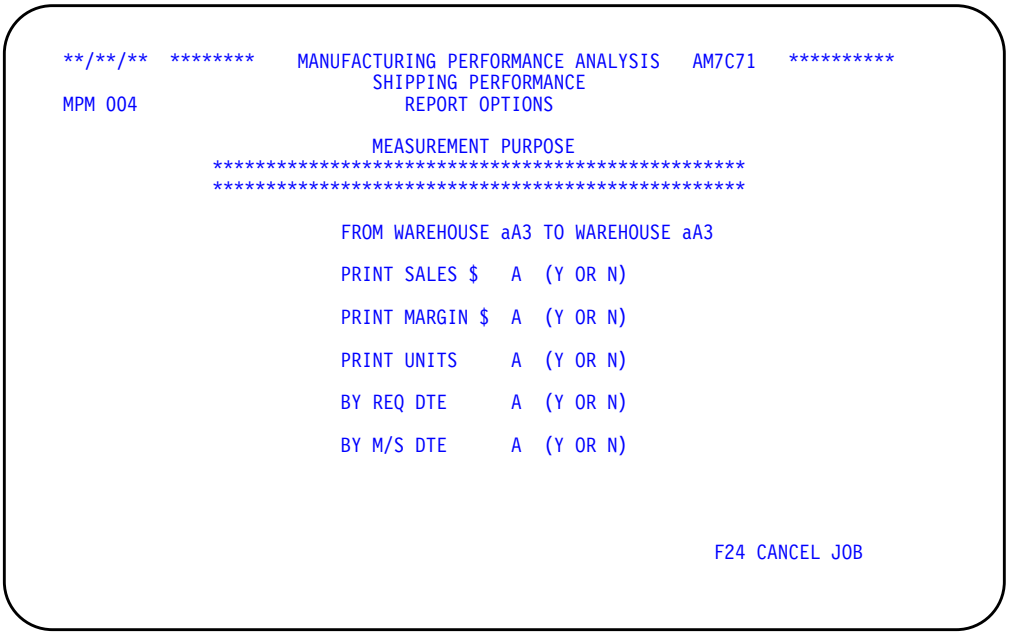
PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed for the performance of all planners in total and all warehouses in total.

Option 4: Shipping Performance

AM7C71—Shipping Performance–Report Options–MPM 4

This display shows the report selection options for printing the Shipping Performance (MPM 4).

This display appears when you select option 4 on the Reports menu.



Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

PRINT SALES $ (Y OR N) (Print sales dollars). Enter **Y** or **N** to indicate if you want the measurement printed in sales dollars.

PRINT MARGIN $ (Y OR N) (Print margin dollars). Enter **Y** or **N** to indicate if you want the measurement printed in profit margin dollars.

PRINT UNITS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed in units.

BY REQ DATE (Y OR N) (By request date). Enter **Y** or **N** to indicate if you want to use the request date as the customer order due date.

BY M/S DATE (Y OR N) (By manufacture schedule date). Enter **Y** or **N** to indicate if you want to use the manufacture schedule date as the customer order due date.

Option 5: Inventory Performance Profile

AM7C91—Inventory Performance Profile–Report Options–MPM 5

This display shows the report selection options for printing the Inventory Performance Profile Performance (MPM 5).

This display appears when you select option 5 on the Reports menu.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7C91   **********
                        INVENTORY PERFORMANCE PROFILE
MPM 005                         REPORT OPTIONS

                          MEASUREMENT PURPOSE
                 ************************************************
                 ************************************************

                     FROM WAREHOUSE  aA3   TO WAREHOUSE aA3

                     PRINT FG $      A  (Y OR N)
                     PRINT WIP $     A  (Y OR N)
                     PRINT MFG $     A  (Y OR N)
                     PRINT PUR $     A  (Y OR N)
                     PRINT RAW $     A  (Y OR N)
                     PRINT OTH $     A  (Y OR N)
                     PRINT TOTL $    A  (Y OR N)









                                                        F24 CANCEL JOB
```

Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

PRINT FG $ (Y OR N) (Print finished goods inventory dollars). Enter **Y** or **N** to indicate if you want the measurement printed for finished goods inventory.

PRINT WIP $ (Y OR N) (Print work-in-process inventory dollars). Enter **Y** or **N** to indicate if you want the measurement printed for work-in-process inventory.

PRINT MFG $ (Y OR N) (Print manufacturing item inventory dollars). Enter **Y** or **N** to indicate if you want the measurement printed for manufactured item inventory.

PRINT PUR $ (Y OR N) (Print purchased item dollars). Enter **Y** or **N** to indicate if you want the measurement printed for purchased item inventory.

PRINT RAW $ (Y OR N) (Print raw material inventory dollars). Enter **Y** or **N** to indicate if you want the measurement printed for raw material inventory.

PRINT OTH $ (Y OR N) (Print other inventory dollars). Enter **Y** or **N** to indicate if you want the measurement printed for all other inventory.

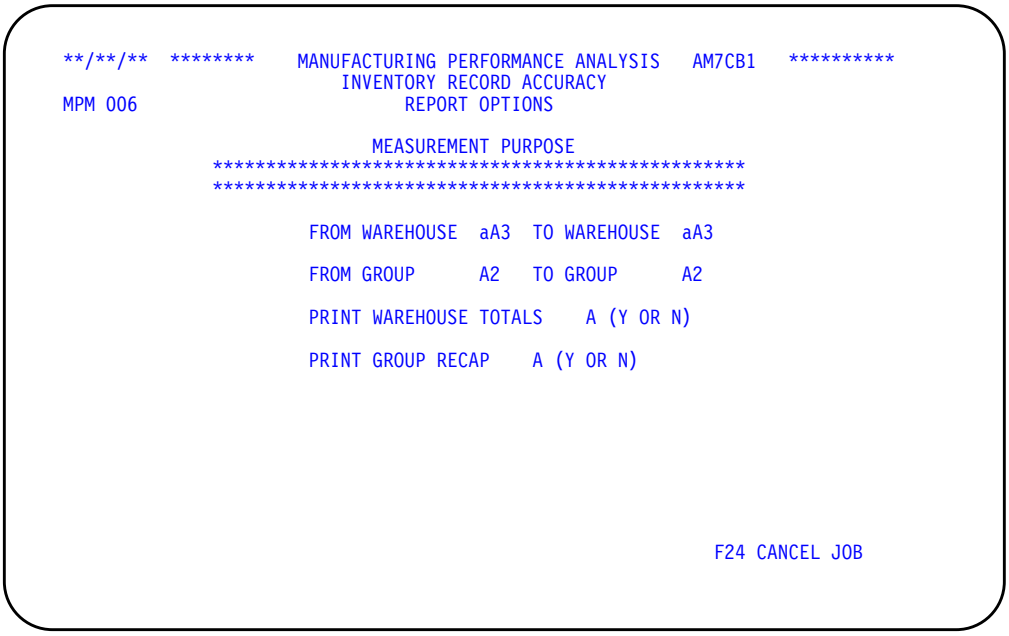
PRINT TOTL $ (Y OR N) (Print total dollars). Enter **Y** or **N** to indicate if you want the measurement printed for the total inventory.

Option 6: Inventory Record Accuracy

AM7CB1—Inventory Record Accuracy–Report Options–MPM 6

This display appears when you select option 6 on the Reports menu.

This display shows the report selection options for printing the Inventory Record Accuracy Performance (MPM 6).



Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

FROM GROUP
TO GROUP. Enter the cycle count control group range limits. If you leave these fields with the default values, performance for all control groups is printed.

PRINT WAREHOUSE TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want to print totals for each warehouse (general population and all control groups).

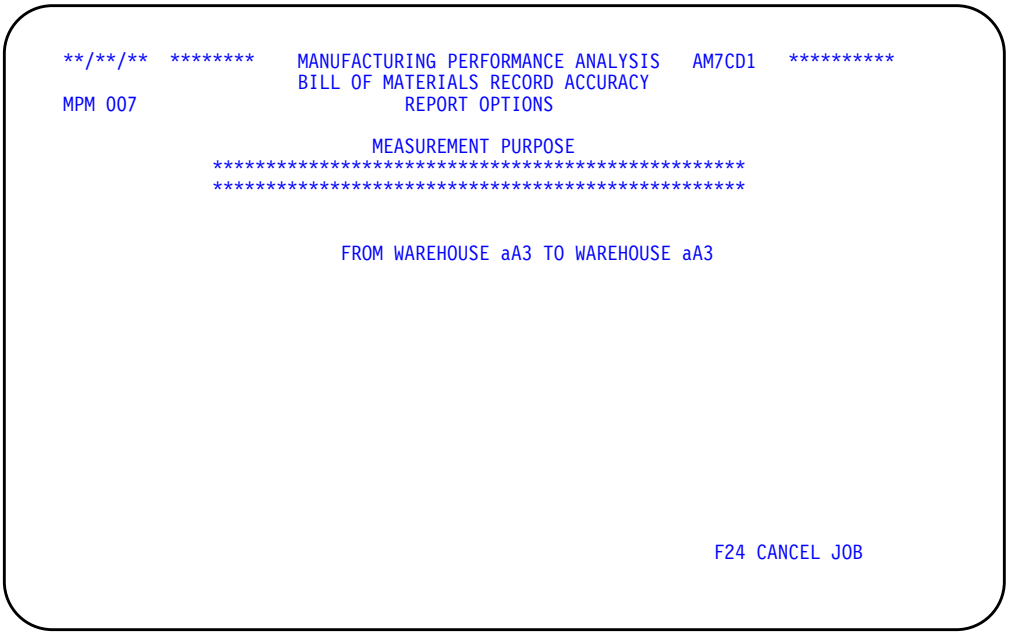
PRINT GROUP RECAP (Y OR N). Enter **Y** or **N** to indicate if you want to print total performance for the control group range chosen.

Option 7: Bill of Materials Record Accuracy

AM7CD1—Bill of Materials Record Accuracy–Report Options–MPM 7

This display shows the report selection options for printing the Bill of Materials Record Accuracy Performance (MPM 7).

This display appears when you select option 7 on the Reports menu.



Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

Option 8: Purchase Commitment Performance

AM7CF1—Purchase Commitment Performance–Report Options–MPM 8

This display shows the report selection options for printing the Purchase Commitment Performance (MPM 8).

This display appears when you select option 8 on the Reports menu.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7CF1   **********
                        PURCHASE COMMITMENT PERFORMANCE
MPM 008                         REPORT OPTIONS

                          MEASUREMENT PURPOSE
                ************************************************
                ************************************************

                          FROM PLANNER   nnnnn  TO PLANNER  nnnnn

                          FROM WAREHOUSE aA3    TO WH       aA3

                          FROM GROUP     nnnnn  TO GROUP    nnnnn

                            PRINT TOTALS   A (Y OR N)









                                                          F24 CANCEL JOB
```

Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM PLANNER
TO PLANNER. Enter the planner range limits. If you leave these fields blank, performance for all planners is printed.

FROM WAREHOUSE
TO WAREHOUSE. Enter the warehouse range limits. If you leave these fields blank, all warehouses are printed.

FROM GROUP
TO GROUP. Enter the range limits. If you leave these fields blank, performance for all planner groups is printed.

PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed for the total of all planners and all warehouses.

Option 9: Order Reschedule Reliability Performance

AM7CH1—Order Reschedule Reliability Performance–Report Options–MPM 9

This display shows the report selection options for printing the Order Reschedule Reliability Performance (MPM 9).

This display appears when you select option 9 on the Reports menu.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7CH1   **********
                  ORDER RESCHEDULE RELIABILITY PERFORMANCE
MPM 009                        REPORT OPTIONS

                          MEASUREMENT PURPOSE
              ************************************************
              ************************************************

                        FROM PLANNER   nnnnn  TO PLANNER   nnnnn

                        FROM WAREHOUSE aA3    TO WAREHOUSE aA3

                        FROM GROUP     nnnnn  TO GROUP     nnnnn

                        PRINT TOTALS   A   (Y OR N)









                                                        F24 CANCEL JOB
```

Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM PLANNER
TO PLANNER. Enter the range limits. If you leave these fields blank, performance for all planners is printed.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

FROM GROUP
TO GROUP. Enter the range limits. If you leave these fields blank, performance for all planner groups is printed.

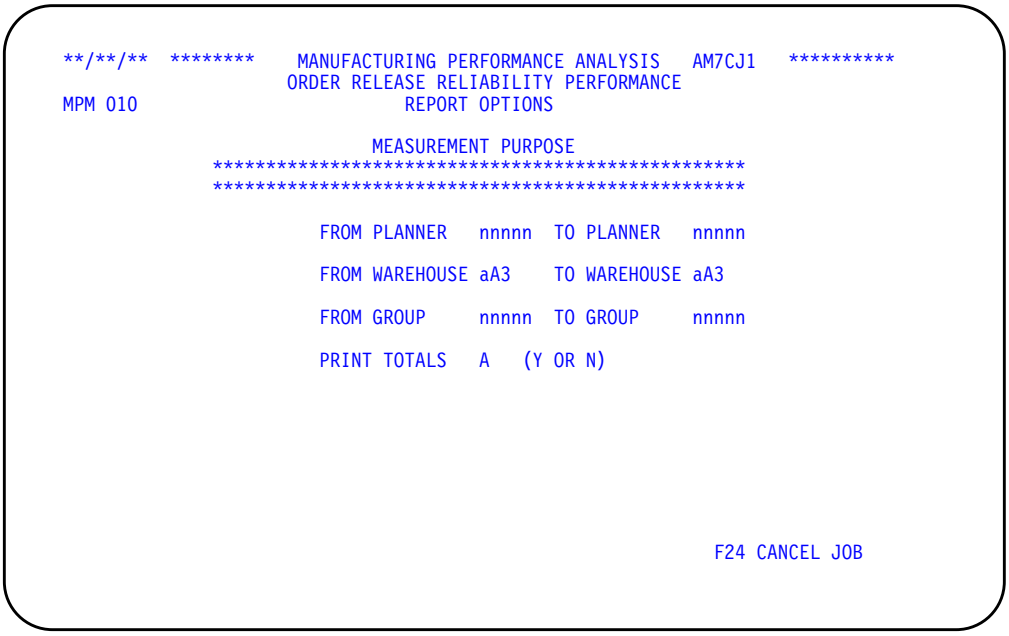
PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed for the total of all planners and all warehouses.

Option 10: Order Release Reliability Performance

AM7CJ1—Order Release Reliability Performance–Report Options–MPM 10

This display shows the report selection options for printing the Order Release Reliability Performance (MPM 10).

This display appears when you select option 10 on the Reports menu.



Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM PLANNER
TO PLANNER. Enter the range limits. If you leave these fields blank, performance for all planners is printed.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

FROM GROUP
TO GROUP. Enter the range limits. If you leave these fields blank, performance for all planner groups is printed.

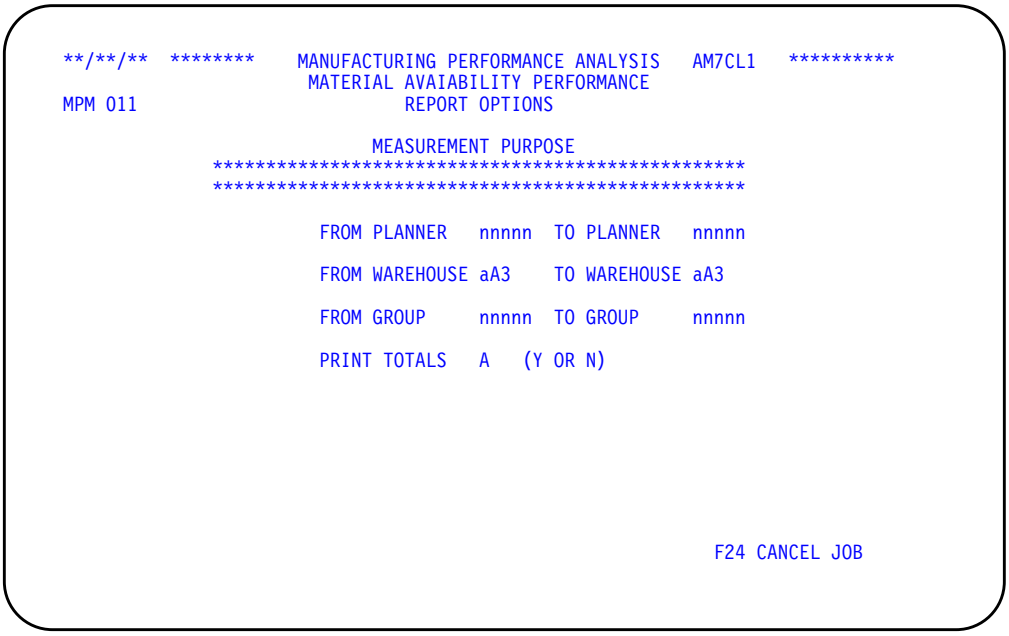
PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed for the total of all planners and all warehouses.

Option 11: Material Availability Performance

AM7CL1—Material Availability Performance–Report Options–MPM 11

This display shows the report selection options for printing the Material Availability Performance (MPM 11).

This display appears when you select option 11 on the Reports menu.



Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM PLANNER
TO PLANNER. Enter the range limits. If you leave these fields blank, performance for all planners is printed.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

FROM GROUP
TO GROUP. Enter the range limits. If you leave these fields blank, performance for these fields blank all planner groups is printed.

PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed for the total of all planners.

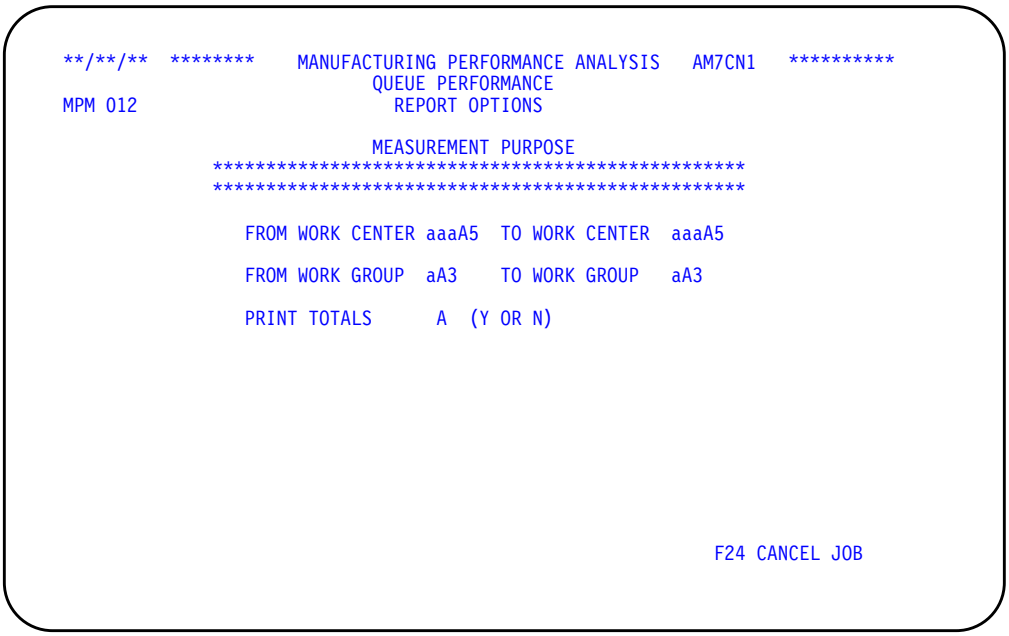
Option 12: Queue Performance

Note: This option is not available if EPDM is activated.

AM7CN1—Queue Performance–Report Options–MPM 12

This display shows the report selection options for printing the work center Queue Performance (MPM 12).

This display appears when you select option 12 on the Reports menu.



Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM WORK CENTER
TO WORK CENTER. Enter the range limits. If you leave these fields blank, performance for all work centers is printed.

FROM WORK GROUP
TO WORK GROUP. Enter the range limits. If you leave these fields blank, performance for all work center groups is printed.

PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed for the total of all work centers.

Option 13: Output Performance

Note: This option is not available if EPDM is activated.

AM7CP1—Output Performance–Report Options–MPM 13

This display shows the report selection options for printing the work center Output Performance (MPM 13).

This display appears when you select option 13 on the Reports menu.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7CP1   **********
                              OUTPUT PERFORMANCE
MPM 013                         REPORT OPTIONS

                            MEASUREMENT PURPOSE
                  ************************************************
                  ************************************************

                     FROM WORK CENTER aaaA5  TO WORK CENTER  aaaA5

                     FROM WORK GROUP  aA3    TO WORK GROUP   aA3

                     PRINT TOTALS      A  (Y OR N)









                                                          F24 CANCEL JOB
```

Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM WORK CENTER
TO WORK CENTER. Enter the range limits. If you leave these fields blank, performance for all work centers is printed.

FROM WORK GROUP
TO WORK GROUP. Enter the range limits. If you leave these fields blank, performance for all work center groups is printed.

PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed for the total of all work centers.

Option 14: Inventory Turnover Trend

AM7CR1—Inventory Turnover Trend–Report Options–MPM 14

This display shows the report selection options for printing the Inventory Turnover Trend (MPM 14).

This display appears when you select option 14 on the Reports menu.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7CR1   **********
                            INVENTORY TURNOVER TREND
MPM 014                          REPORT OPTIONS

                          MEASUREMENT PURPOSE
                  ************************************************
                  ************************************************

                         FROM WAREHOUSE aA3 TO WAREHOUSE aA3

                         PRINT DAYS SALES      A (Y OR N)

                         PRINT DAYS PRODUCTION A (Y OR N)









                                                          F24 CANCEL JOB
```

Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

PRINT DAYS SALES (Y OR N). Type in **Y** or **N** to indicate if you want to print the finished goods inventory turnover trend measurement.

PRINT DAYS PRODUCTION (Y OR N). Type in **Y** or **N** to indicate if you want to print the production inventory turnover trend measurement.

Option 15: Excess Inventory Analysis

AM7CT1—Excess Inventory Analysis–Report Options–MPM 15

This display shows the report selection options for printing the Excess Inventory Analysis Performance (MPM 15).

This display appears when you select option 15 on the Reports menu.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7CT1   **********
                           EXCESS INVENTORY ANALYSIS
MPM 015                         REPORT OPTIONS

                         MEASUREMENT PURPOSE
                 ************************************************
                 ************************************************

                      FROM PLANNER   nnnnn  TO PLANNER   nnnnn

                      FROM WAREHOUSE aA3    TO WAREHOUSE aA3

                      FROM GROUP     nnnnn  TO GROUP     nnnnn

                        PRINT BY TOTAL  A  (Y OR N)

                        PRINT EXCESS 1  A  (Y OR N)
                        PRINT EXCESS 2  A  (Y OR N)
                        PRINT EXCESS 3  A  (Y OR N)









                                                        F24 CANCEL JOB
```

Function keys

F24 CANCEL JOB causes the application to cancel printing this report.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement.

FROM PLANNER
TO PLANNER. Enter the planner range limits. If you leave these fields blank, performance for all planners is printed.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

FROM GROUP
TO GROUP. Enter the range limits. If you leave these fields blank, performance for all planner groups is printed.

PRINT BY TOTAL (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed for the total inventory for all planners in total and all warehouses in total.

PRINT EXCESS 1
PRINT EXCESS 2
PRINT EXCESS 3 (Y OR N). Enter **Y** or **N** to indicate if you want to print the measurement for excess period 1, 2 or 3.

Chapter 5. Close Simulation and Period Close

"Option 3: Close Simulation" on page 5-2 and "Option 4: Period Close" on page 5-11 (options 3 and 4 from the Main Menu) are discussed in this chapter. The Close Simulation displays are the same as the Period Close displays except where noted. Close Simulation updates the current period (the right most period on printouts and inquiries) for each measurement and does not produce printed reports automatically.

Option 3: Close Simulation

Notes:

1. The displays in the following table are used in this option, may be discussed in the Close Simulation section, but are not shown.
2. If EPDM is activated, the Bill of Materials Record Accuracy, Queue Performance/ Output Performance measurements are disabled.
3. One or more of the displays listed in the following table appear for each measurement you select for simulation:

Display	Display description	From the display“AM7K21—Close Simulation (Select)”,
AM7G31	Customer Order Backlog Performance Period Simulation Options	Select “Customer Order Backlog Analysis” (MPM 2)
AM7G51	Master Schedule Performance Period Simulation Options	Select “Master Schedule Performance” (MPM 3)
AM7G71	Shipping Performance Period Simulation Options	Select “Shipping Performance” (MPM 4)
AM7GC1	Inventory Record Accuracy Period Simulation Options	Select “Inventory Record Accuracy” (MPM 6)
AM7GE1	Bill of Materials Record Accuracy Period Simulation Options	Select “Bill of Materials Record Accuracy” (MPM 7).
AM7GG1	Purchase Commitment Performance Period Simulation Options	Select “Purchase Commitment Performance” (MPM 8)
AM7GI1	Order Reschedule Reliability/Material Availability Reliability Period Simulation Options	Select “Order Reschedule Reliability” (MPM 9). This also selects “Material Availability Reliability”(MPM 11)
AM7GL1	Order Release Reliability Period Simulation Options	Select “Order Release Reliability” (MPM 10)
AM7GP1	Queue Performance/Output Performance	“Queue Performance” (MPM 12) and Select “Output Performance” (MPM 13).
AM7GT1	Inventory Turnover Trend	Select “Inventory Turnover Trend” (MPM 14). This also selects “Inventory Performance Profile” (MPM 5).
AM7GV1	Excess Inventory Analysis	Select “Excess Inventory Analysis” (MPM 15).

AM7K21—Close Simulation (Select)

This display shows the measurements to be selected for Close Simulation. You can select the measurement to close.

Selecting option 3 from the Main Menu causes this display to appear.

To select a measurement for Close Simulation, type **S** next to the MPM (Manufacturing performance measurement) number(s). If you select MPM 9, MPM 11 is automatically selected for close simulation. If you select MPM 14, MPM 5 is automatically selected for Close Simulation.

Note: You cannot select MPM 12 or MPM 13 since there is no Close Simulation for either.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   SELECT   AM7K21   **
                              CLOSE SIMULATION
ENTER 'S' TO SELECT FOR SIMULATION                                      LAST
                                                          LAST CLOSE  SIMULATION
        MEASUREMENT NAME                        FREQUENCY    DATE        DATE
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**
A  ***  ***********************************  *********  **/**/**    **/**/**

* = REQUIRED APPLICATION NOT INSTALLED
X = SIMULATION NOT AVAILABLE FOR THIS MEASUREMENT     F23 START SIMULATIONS
                                                      F24 CANCEL JOB
```

Function keys

F23 START SIMULATIONS causes simulation displays for the selected measurements to appear.

F24 CANCEL JOB causes the job to cancel. The Main Menu appears.

Fields

MEASUREMENT NAME. This field shows the name of the measurements to select for simulation.

FREQUENCY. The frequency the measurement is to be closed.

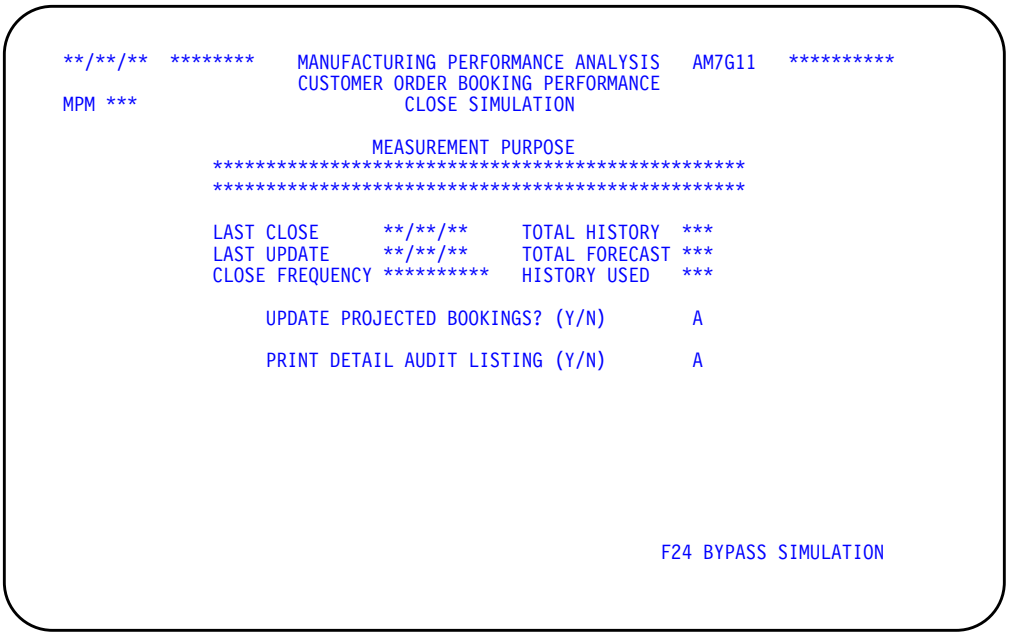
LAST CLOSE DATE. The date the measurement was last closed.

LAST SIMULATION DATE. The date the simulation was last performed.

AM7G11—Customer Order Booking Performance–Close Simulation

This sample display shows an example of a Close Simulation status for a measurement selected for Close Simulation (AM7K21).

Pressing **F23** on the Close Simulation Selection display causes this display to appear for each selected measurement.



Function keys

F24 BYPASS SIMULATION cancels Close Simulation for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

LAST CLOSE. The date of the last Period Close update for this measurement.

LAST UPDATE. The date of the last Close Simulation for this measurement.

CLOSE FREQUENCY. The frequency that this measurement should be closed.

TOTAL HISTORY. The number of history periods used to retain performance for this measurement.

TOTAL FORECAST. The number of forecast periods for this measurement.

HISTORY USED. The number of history periods that have been updated to-date.

UPDATE PROJECTED BOOKINGS? (Y/N)
UPDATE PROJECTED BALANCES? (Y/N)
UPDATE PROJECTED SHIPPING REQUIREMENTS? (Y/N). This choice appears for MPM 1 (bookings), MPM 5 (balances), and MPM 14 (shipping requirements). Enter **Y** or **N** to indicate if you want to change your forecast for any forecast period other than the current period forecast.

PRINT DETAIL AUDIT LISTING (Y/N). Type in a **Y** to have the audit report printed after the measurement is closed. The audit report is a listing of the detail data used to calculate and update the performance data. The audit report can be used to validate the performance measurement, as well as, identify items, orders, data base files, or procedures that require corrective action.

AM7G12—Customer Order Booking Performance–Forecasted Booking Entry

This display lets you change or update forecasted bookings by product model.

This display appears when you answer **YES** to ***UPDATE PROJECTED BOOKINGS?*** on the Close Simulation Options (AM7G11) display for MPM 1.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7G12   **********
                      CUSTOMER ORDER BOOKING PERFORMANCE
                           FORECASTED BOOKING ENTRY

MODEL  ** ************************

FORE               BOOKED         BOOKED
CAST                  $            UNITS


*****          nnnnnnnnnnn      nnnnnnnnnn
*****          nnnnnnnnnnn      nnnnnnnnnn
*****          nnnnnnnnnnn      nnnnnnnnnn
*****          nnnnnnnnnnn      nnnnnnnnnn
*****          nnnnnnnnnnn      nnnnnnnnnn
*****          nnnnnnnnnnn      nnnnnnnnnn
*****          nnnnnnnnnnn      nnnnnnnnnn
*****          nnnnnnnnnnn      nnnnnnnnnn
*****          nnnnnnnnnnn      nnnnnnnnnn
*****          nnnnnnnnnnn      nnnnnnnnnn
                                                                          +
                                                  F02 NEXT MODEL
                                                  F03 PREV MODEL
                                                  F23 SUBMIT SIMULATION
                                                  F24 BYBASS SIMULATION
```

Function keys

F02 NEXT MODEL causes the Forecasted Booking Entry display for the next product model to appear.

F03 PREV MODEL (Previous model) causes the Forecasted Booking Entry display for the previous product model to appear.

F23 SUBMIT SIMULATION causes the Close Simulation for this measurement to start. Do not use this function key unless you are finished reviewing and entering the forecast for all product models.

F24 BYPASS SIMULATION cancels Close Simulation for this measurement.

Fields

MODEL. The model number of the product being forecasted.

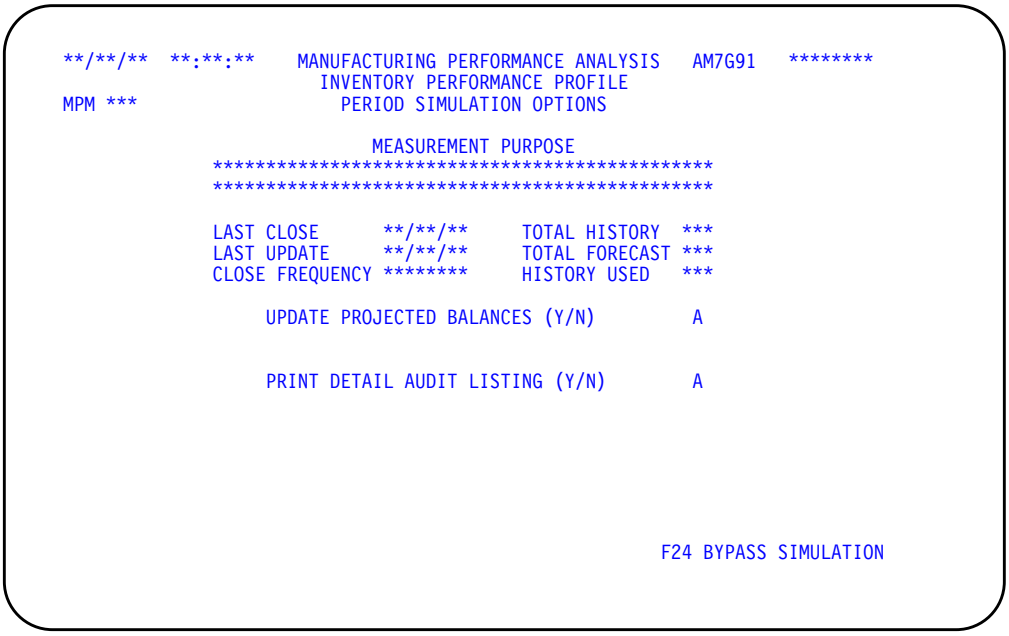
FORECAST. The date of the period to be forecast.

BOOKED $ (Booked dollars). Type in your projection for customer order bookings in sales $ for the period for this product model.

BOOKED UNITS. Type in your projection for customer order bookings in units for the period for this product model.

AM7G91—Inventory Performance Profile–Period Simulation Options

This display allows you to select close simulation options for MPM 5.



Function keys

F24 BYPASS SIMULATION cancels close simulation for this measurement.

Fields

LAST CLOSE. The date of the last period close for this measurement.

LAST UPDATE. The date of the last close simulation for this measurement.

CLOSE FREQUENCY. The frequency with which this measurement should be closed.

TOTAL HISTORY. The number of history periods for this measurement.

TOTAL FORECAST. The number of forecast periods for this measurement.

HISTORY USED. The number of history periods updated to date.

UPDATE PROJECTED BALANCES (Y/N). Type in **Y** to change the forecast for a forecast period other than the current period forecast.

PRINT DETAIL AUDIT LISTING (Y/N). Type in **Y** to print the audit report after the measurement is closed.

AM7G92—Inventory Performance Profile–Forecasted Balance Entry

This display allows you to enter or change forecasted inventory level for each inventory category for each warehouse.

This display appears if you answer yes to ***UPDATE PROJECTED BALANCES?*** on the Close Simulation Options (AM7G91) display for MPM 5.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7G92   **********
                        INVENTORY PERFORMANCE PROFILE
                          FORECASTED BALANCE ENTRY

WAREHOUSE ***  MRP PLANNING WAREHOUSE

FORE   FINISHED   MANUFACTD     WORK IN   PURCHASED      RAW        OTHER
CAST    GOODS       ITEMS       PROCESS     ITEMS     MATERIALS   INVENTORY
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn


                                                        F02 NEXT WAREHOUSE
                                                        F03 PREV WAREHOUSE
                                                        F23 SUBMIT SIMULATION
                                                        F24 BYPASS SIMULATION
```

Function keys

F02 NEXT WAREHOUSE causes the Forecasted Booking Entry display for the next warehouse to appear.

F03 PREV WAREHOUSE (Previous warehouse) causes the Forecasted Booking Entry display for the previous warehouse to appear.

F23 SUBMIT SIMULATION causes the Close Simulation for this measurement to start. Do not use this function key unless you are finished reviewing and entering the balances for all warehouses.

F24 BYPASS SIMULATION cancels Close Simulation for this measurement.

Fields

WAREHOUSE. The inventory warehouse to which the forecast entry applies.

FORECAST. The date of the period to be forecast.

FINISHED GOODS. Type in your projection for finished goods inventory level in dollars for this warehouse for each forecast period you want to change. The current period forecast cannot be changed.

MANUFACTD ITEMS (Manufactured items). Type in your projection for manufactured items inventory level in dollars for this warehouse for each forecast period you want to change. The current period forecast cannot be changed.

WORK IN PROCESS. Type in your projection for work in process inventory level in dollars for this warehouse for each forecast period you want to change. The current period forecast cannot be changed.

PURCHASED ITEMS. Type in your projection for purchased items inventory level in dollars for this warehouse for each forecast period you want to change. The current period forecast cannot be changed.

RAW MATERIALS. Type in your projection for raw material inventory level in dollars for this warehouse for each forecast period you want to change. The current period forecast cannot be changed.

OTHER INVENTORY. Type in your projection for all other inventoried items inventory level in dollars for this warehouse for each forecast period you want to change. The current period forecast cannot be changed.

Option 4: Period Close

Notes:

1. The displays in the following table are used in this option, may be discussed in the Close Simulation section, but are not shown.
2. If EPDM is activated, the Bill of Materials Record Accuracy, Queue Performance/ Output Performance measurements are disabled.
3. One or more of the displays listed in the following table, appear for each measurement you select for simulation:

Display	Display description	From the display“AM7K11—Period Close (Select)”,
AM7G51	Master Schedule Performance Period Close Options	Select Master Schedule Performance (MPM 3).
AM7G71	Shipping Performance Period Close Options	Select Shipping Performance (MPM 4).
AM7G91	Inventory Performance Profile Period Close Options	Select Inventory Performance Profile (MPM 5).
AM7GC1	Inventory Record Accuracy Period Close Options	Select Inventory Record Accuracy (MPM 6).
AM7GE1	Bill of Materials Record Accuracy Period Close Options	Select Bill of Materials Record Accuracy (MPM 7). Not available in EPDM mode.
AM7GG1	Purchase Commitment Performance Period Close Options	Select Purchase Commitment Performance (MPM 8).
AM7GI1	Order Reschedule Reliability/Material Availability Reliability Period Close Options	Select Order Reschedule Reliability (MPM 9). Also selects Material Availibility Performance (MPM 11).
AM7GL1	Order Release Reliability Period Close Options	Select Order Release Reliability (MPM 10).
AM7GT1	Inventory Turnover Trend	Select Inventory Turover Trend (MPM 14). Also selects Inventory Performance Profile (MPM 5).
AM7GP1	Queue Performance/Output Performance Period Close Options	Select Queue Performance (MPM 12). Not available in EPDM mode.
AM7GV1	Excess Inventory Analysis Period Close Options	Select Excess Inventory Analysis (MPM 15).

AM7K11—Period Close (Select)

This display shows the measurements to be selected for Period Close. You can select the measurement to close.

Selecting option 4 from the Main Menu causes this display to appear.

Those measurements that are due to be closed have a **C** already entered. To select any additional measurements to be closed, enter a **C** opposite the measurement. If you do not want to close a measurement that has been selected, enter a blank opposite the measurement. If you select MPM 14, then MPM 5 is automatically selected for close. If you select MPM 9, then MPM 11 is automatically selected. If you select MPM 7, then MPM 12 and MPM 13 are automatically selected.

Note: If EPDM is activated, MPM 7, 12, and 13 are disabled.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   SELECT   AM7K11   **
                                PERIOD CLOSE
ENTER 'C' TO SELECT FOR CLOSE
                                                          LAST CLOSE  NEXT CLOSE
        MEASUREMENT NAME                          FREQUENCY    DATE        DATE
A  ***  **********************************  *********  **/**/**    **/**/**
A  ***  **********************************  *********  **/**/**    **/**/**
A  ***  **********************************  *********  **/**/**    **/**/**
A  ***  **********************************  *********  **/**/**    **/**/**
A  ***  **********************************  *********  **/**/**    **/**/**
A  ***  **********************************  *********  **/**/**    **/**/**
A  ***  **********************************  *********  **/**/**    **/**/**
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A  ***  **********************************  *********  **/**/**    **/**/**
A  ***  **********************************  *********  **/**/**    **/**/**
A  ***  **********************************  *********  **/**/**    **/**/**

* = REQUIRED APPLICATION NOT INSTALLED
# = PC&C CLOSE MUST BE RUN FIRST                    F23 START CLOSES
                                                    F24 CANCEL JOB
```

Function keys

F23 START CLOSES causes Period Close displays for the selected measurements to appear.

F24 CANCEL JOB causes the job to cancel. The Main Menu appears.

Fields

MEASUREMENT NAME. This field shows the name of the measurements to select for simulation.

FREQUENCY. The frequency that the measurement is to be closed.

LAST CLOSE DATE. The date that the measurement was last closed.

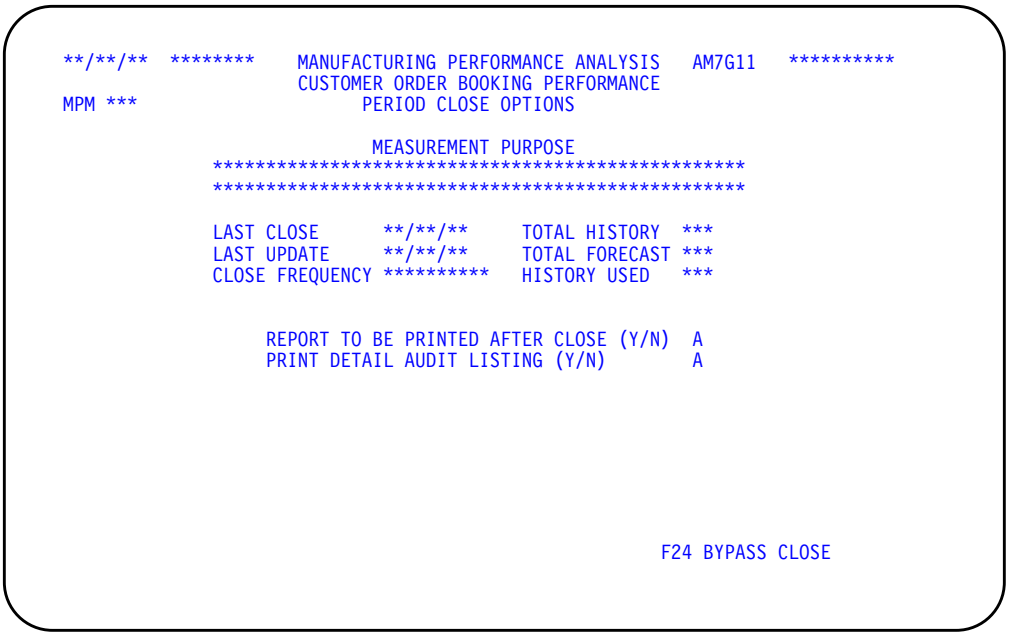
NEXT CLOSE DATE. The suggested next close date. If the close is due, the date is highlighted. MPM 7, 12, and 13 are selected for close before the suggested next closeout date if Inventory Management or Production Control & Costing order closeout and purge has been run since their last close. A # sign appears next to MPM 7, 12 and 13 if Order Close has not been run since these measurements were last closed.

Note: If EPDM is activated, MPM 7, 12, and 13 are disabled.

AM7G11—Customer Order Booking Performance–Period Close Options

This sample display shows an example of a Period Close status for a measurement selected for Period Close (AM7K11).

Pressing **F23** on the Period Close Selection display causes this display to appear for each selected measurement.



Function keys

F24 BYPASS CLOSE cancels this measurement Period Close selection.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

LAST CLOSE. The date of the last Period Close update for this measurement.

LAST UPDATE. The date of the last Close Simulation for this measurement.

CLOSE FREQUENCY. The frequency that this measurement should be closed.

TOTAL HISTORY. The number of history periods used to retain performance for this measurement.

TOTAL FORECAST. The number of forecast periods for this measurement.

HISTORY USED. The number of history periods that have been updated to-date.

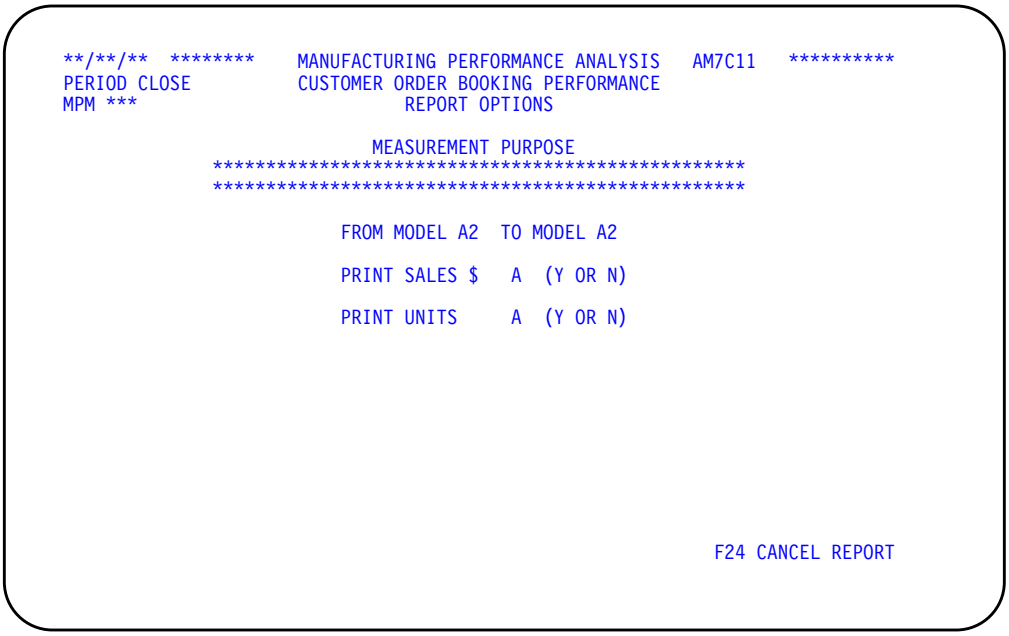
REPORT TO BE PRINTED AFTER CLOSE (Y/N). The default value from Measurement Master Maintenance appears. Type in **Y** or **N** to change the default value. If this value is Y, the performance report is printed after this measurement is closed and updated.

PRINT DETAIL AUDIT LISTING (Y/N). Type in **Y** to have the audit report printed after the measurement is closed. The audit report is a listing of the detail data used to calculate and update the performance data. The audit report can be used to validate the performance measurement as well as identify items, orders, data base files, or procedures that require corrective action.

AM7C11—Customer Order Booking Performance–Period Close Report Options–MPM 1

This display shows the Period Close report options for MPM 1.

This display appears when you press **F23** on the Forecasted Booking Entry display (AM7G12) and you have selected to print reports.



Function keys

F24 CANCEL REPORT cancels printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM MODEL
TO MODEL. Enter the model code range for which you want the measurement printed. If you leave these fields blank, all models are printed.

PRINT SALES $ (Y OR N) (Print sales dollars). Enter **Y** or **N** to indicate if you want the measurement printed in sales dollars.

PRINT UNITS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed in units.

AM7G12—Customer Order Booking Performance–Forecasted Booking Entry

This display shows the bookings forecast for each model and allows forecast entry or changes to be made before Period Close.

This display appears when you press **Enter** on the Period Close Options display (AM7G11) for MPM 1.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7G12   **********
                      CUSTOMER ORDER BOOKING PERFORMANCE
                           FORECASTED BOOKING ENTRY

MODEL  ** *************************

FORE              BOOKED          BOOKED
CAST                 $             UNITS


*****          nnnnnnnnnnn     nnnnnnnnnn
*****          nnnnnnnnnnn     nnnnnnnnnn
*****          nnnnnnnnnnn     nnnnnnnnnn
*****          nnnnnnnnnnn     nnnnnnnnnn
*****          nnnnnnnnnnn     nnnnnnnnnn
*****          nnnnnnnnnnn     nnnnnnnnnn
*****          nnnnnnnnnnn     nnnnnnnnnn
*****          nnnnnnnnnnn     nnnnnnnnnn
*****          nnnnnnnnnnn     nnnnnnnnnn
*****          nnnnnnnnnnn     nnnnnnnnnn                                  +
                                                F02 NEXT MODEL
                                                F03 PREV MODEL
                                                F23 SUBMIT CLOSE
                                                F24 BYBASS CLOSE
```

Function keys

F02 NEXT MODEL causes the next model forecast to appear.

F03 PREV MODEL (Previous model) causes the previous model forecast to appear.

F23 SUBMIT CLOSE causes the forecasts for all models to be accepted and submitted to the next Period Close step. Do not use this function key unless you are finished reviewing and entering the forecast for all product models.

F24 BYPASS CLOSE causes the close for this measurement to be canceled. This appears only on the last model's forecast entry display.

Fields

MODEL. The model number of the product being forecasted.

FORECAST. The forecast periods. The system date appears in the first forecast period. The forecast values for this period cannot be changed. Forecast periods with future dates can have their forecast changed. When this measurement is submitted for close the first forecast after the period with the current date becomes the frozen forecast for the current period. A forecast should be entered for any blank forecast periods.

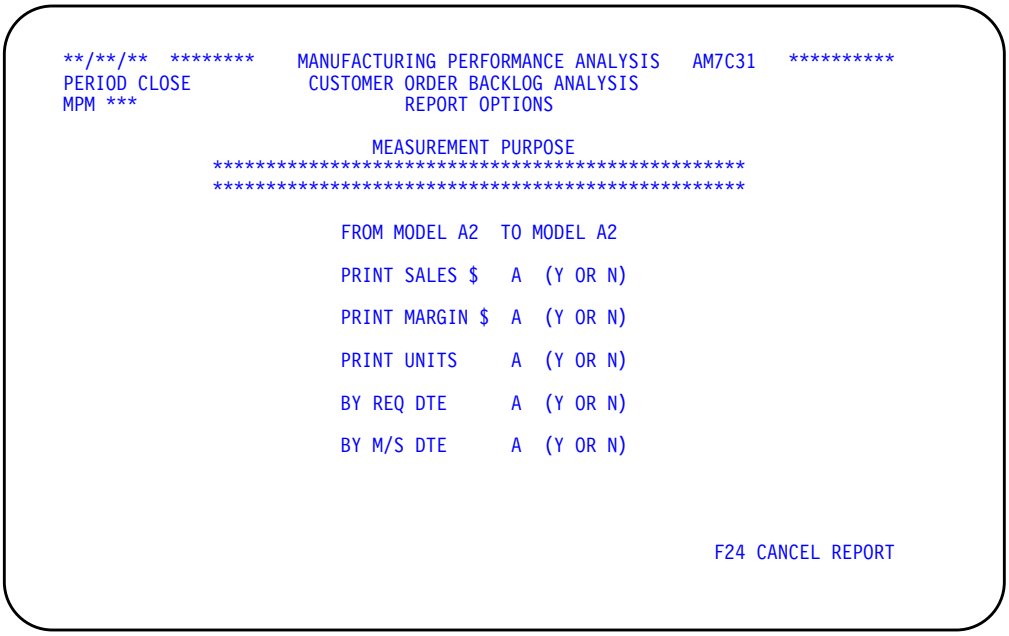
BOOKED $ (Booked dollars). The forecasted bookings in sales dollars for each forecast period.

BOOKED UNITS. The forecasted bookings in units for each forecast period.

AM7C31—Customer Order Backlog Analysis–Period Close Report Options–MPM 2

This display shows the Period Close report options for MPM 2.

This display appears when you press **Enter** on the Period Close Options display (AM7G31) and you have selected to print reports.



Function keys

F24 CANCEL REPORT cancels printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM MODEL
TO MODEL. Enter the model code range for which you want the measurement printed. If you leave these fields blank, all models are printed.

PRINT SALES $ (Y OR N) (Print sales dollars). Enter **Y** or **N** to indicate if you want the measurement printed in sales dollars.

PRINT MARGIN $ (Y OR N) (Print profit margin dollars). Enter **Y** or **N** to indicate if you want the measurement printed in profit margin dollars.

PRINT UNITS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed in units.

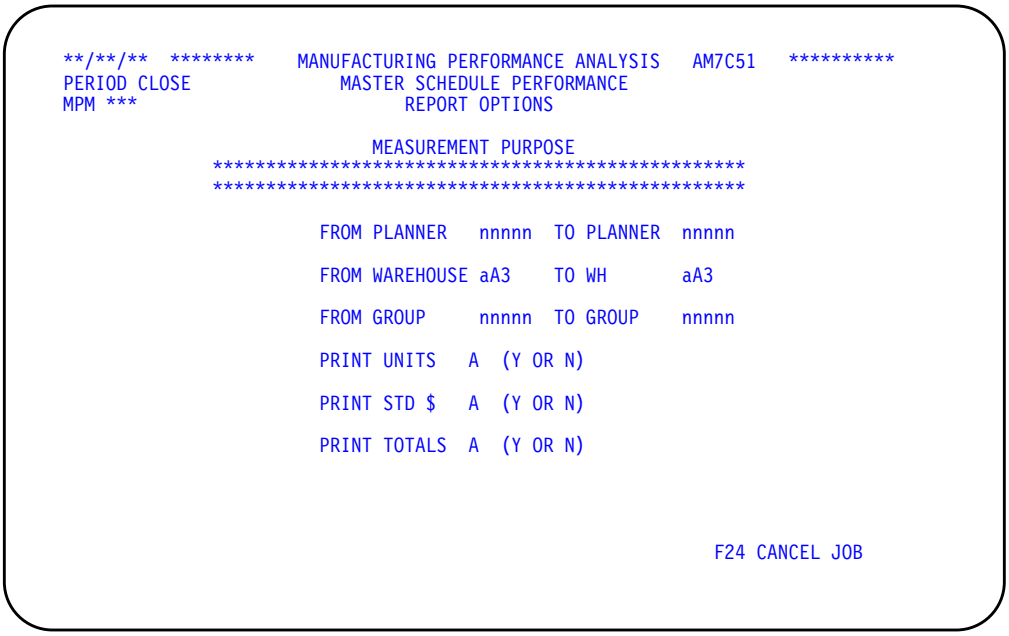
BY REQ DTE (Y OR N) (By request date). Enter **Y** or **N** to indicate if you want to show performance with the customer order request date as the customer order due date.

BY M/S DTE (Y OR N) (By manufacture schedule date). Enter **Y** or **N** to indicate if you want to show performance with the customer order manufacture schedule date as the customer order due date.

AM7C51—Master Schedule Performance–Period Close Report Options–MPM 3

This display shows the Period Close report options for MPM 3.

This display appears when you press **Enter** on the Period Close Options display (AM7G51) and you selected to print reports.



Function keys

F24 CANCEL REPORT cancels printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM PLANNER
TO PLANNER. Enter the planner range for which you want the measurement printed. If you leave these fields blank, all planners are printed.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

FROM GROUP
TO GROUP. Enter the group range for which you want the measurement printed. If you leave these entrees blank, all groups are printed.

PRINT UNITS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed in units.

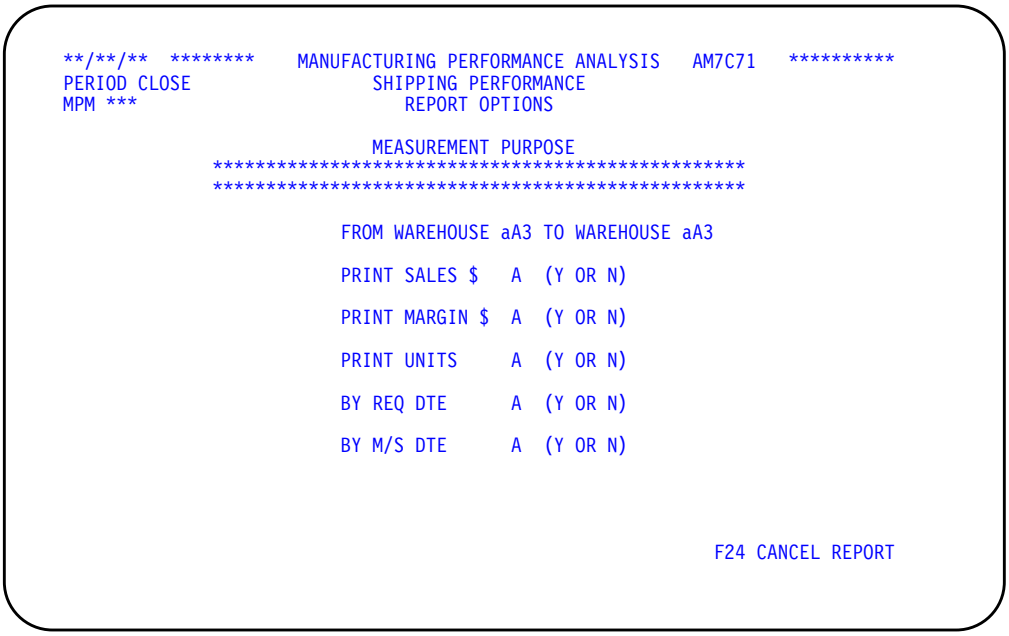
PRINT STD $ (Y OR N) (Print inventory cost dollars). Enter **Y** or **N** to indicate if you want the measurement printed in inventory cost dollars.

PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed for the total performance of all planners in each warehouse.

AM7C71—Shipping Performance–Period Close Report Options– MPM 4

This display shows the Period Close report options for MPM 4.

This display appears when you press **Enter** on the Period Close Options display (AM7G71) and you have selected to print reports.



Function keys

F24 CANCEL REPORT cancels printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

PRINT SALES $ (Y OR N) (Print sales dollars). Enter **Y** or **N** to indicate if you want the measurement printed in sales dollars.

PRINT MARGIN $ (Y OR N) (Print profit margin dollars). Enter **Y** or **N** to indicate if you want the measurement printed in profit margin dollars.

PRINT UNITS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed in units.

BY REQ DTE (Y OR N) (By request date). Enter **Y** or **N** to indicate if you want to show performance with the customer order request date as the customer order due date.

BY M/S DTE (Y OR N) (By manufacture schedule date). Enter **Y** or **N** to indicate if you want to show performance with the customer order manufacture schedule date as the customer order due date.

AM7G92—Inventory Performance Profile–Forecasted Balance Entry

This display allows entry or change of forecasted inventory balances for each warehouse.

This display appears when you press **Enter** on the Period Close Report Options display for MPM 5 (AM7C91) and you selected to print reports.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7G92    **********
                        INVENTORY PERFORMANCE PROFILE
                          FORECASTED BALANCE ENTRY

WAREHOUSE ***  MRP PLANNING WAREHOUSE

FORE    FINISHED    MANUFACTD      WORK IN    PURCHASED       RAW        OTHER
CAST     GOODS        ITEMS        PROCESS      ITEMS      MATERIALS   INVENTORY
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn
***** nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn nnnnnnnnnnn


                                                        F02 NEXT WAREHOUSE
                                                        F03 PREV WAREHOUSE
                                                        F23 SUBMIT CLOSE
                                                        F24 BYPASS CLOSE
```

Function keys

F02 NEXT WAREHOUSE causes the forecast for the next warehouse to appear.

F03 PREV WAREHOUSE causes the previous warehouse forecast to appear.

F23 SUBMIT CLOSE causes the forecasts for all warehouses to be accepted and submitted to the next Period Close step. This function key should be used only on the last warehouse forecast entry display or if you have no more forecasts to enter.

F24 BYPASS CLOSE causes the close for this measurement to be canceled.

Fields

WAREHOUSE. The inventory warehouse to which the forecast entry applies.

FORECAST. The forecast periods. Type in an inventory level forecast for each inventory category for all empty forecast periods. You can change existing forecasts except the first period forecast. The first period listed is the first period forecast from the last Period Close and cannot be changed. This forecast appears for reference purposes. When this measurement is submitted for close, the forecast for Period 1 is frozen.

FINISHED GOODS. The forecasted level of finished goods inventory for each forecast period in inventory cost dollars. If this measurement is tailored to use MRP planned orders, this field can only be maintained for non-MRP warehouses.

MANUFACTD ITEMS (Manufactured items). The forecasted level of manufactured item inventory for each forecast period in inventory cost dollars. If this measurement is tailored to use MRP planned orders, this field can only be maintained for non-MRP warehouses.

WORK IN PROCESS. The forecasted level of work in process inventory for each forecast period in inventory cost dollars. You should enter a forecast for the latest forecast period for all warehouses.

PURCHASED ITEMS. The forecasted level of purchased item inventory for each forecast period in inventory cost dollars. If this measurement is tailored to use MRP planned orders, this field can only be maintained for non-MRP warehouses.

RAW MATERIALS. The forecasted level of raw material inventory for each forecast period in inventory cost dollars. If this measurement is tailored to use MRP planned orders, this field can only be maintained for non-MRP warehouses.

OTHER INVENTORY. The forecasted level of all other inventory for each forecast period in inventory cost dollars. If this measurement is tailored to use MRP planned orders, this field can only be maintained for non-MRP warehouses.

AM7C91—Inventory Performance Analysis–Period Close Report Options–MPM 5

This display shows the Period Close printed report options for MPM 5.

This display appears when you press **F23** on the Forecasted Balance Entry display (AM7G92) and you selected to print reports.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7C91   **********
PERIOD CLOSE            INVENTORY PERFORMANCE PROFILE
MPM ***                         REPORT OPTIONS

                          MEASUREMENT PURPOSE
                ************************************************
                ************************************************

                     FROM WAREHOUSE  aA3   TO WAREHOUSE aA3

                     PRINT FG $      A  (Y OR N)
                     PRINT WIP $     A  (Y OR N)
                     PRINT MFG $     A  (Y OR N)
                     PRINT PUR $     A  (Y OR N)
                     PRINT RAW $     A  (Y OR N)
                     PRINT OTH $     A  (Y OR N)
                     PRINT TOTL $    A  (Y OR N)




                                                    F24 CANCEL REPORT
```

Function keys

F24 CANCEL REPORT cancels printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

PRINT FG $ (Y OR N) (Print finished goods inventory dollars). Enter **Y** or **N** to indicate if you want the measurement printed for finished goods inventory.

PRINT WIP $ (Y OR N) (Print work-in-process inventory dollars). Enter **Y** or **N** to indicate if you want the measurement printed for work-in-process inventory.

PRINT MFG $ (Y OR N) (Print manufactured item inventory dollars). Enter **Y** or **N** to indicate if you want the measurement printed for manufactured item inventory.

PRINT PUR $ (Y OR N) (Print purchased item inventory dollars). Enter **Y** or **N** to indicate if you want the measurement printed for purchased item inventory.

PRINT RAW $ (Y OR N) (Print raw material inventory dollars). Enter **Y** or **N** to indicate if you want the measurement printed for raw material inventory.

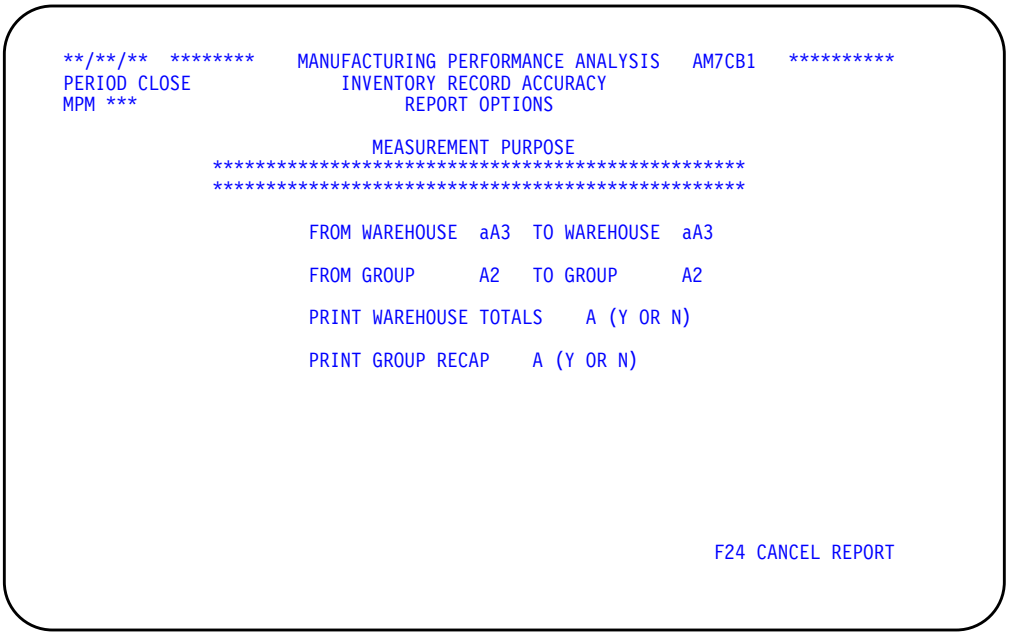
PRINT OTH $ (Y OR N) (Print other inventory dollars). Enter **Y** or **N** to indicate if you want the measurement printed for all other inventory.

PRINT TOTL $ (Y OR N) (Print total inventory dollars). Enter **Y** or **N** to indicate if you want the measurement printed for the total inventory.

AM7CB1—Inventory Record Accuracy–Period Close Report Options–MPM 6

This display shows the Period Close report options for MPM 6.

This display appears when you press **Enter** on the Period Close Options display (AM7GE1) and you selected to print reports.



Function keys

F24 CANCEL REPORT cancels printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

FROM GROUP
TO GROUP. Enter the control group range for which you want the measurement printed.

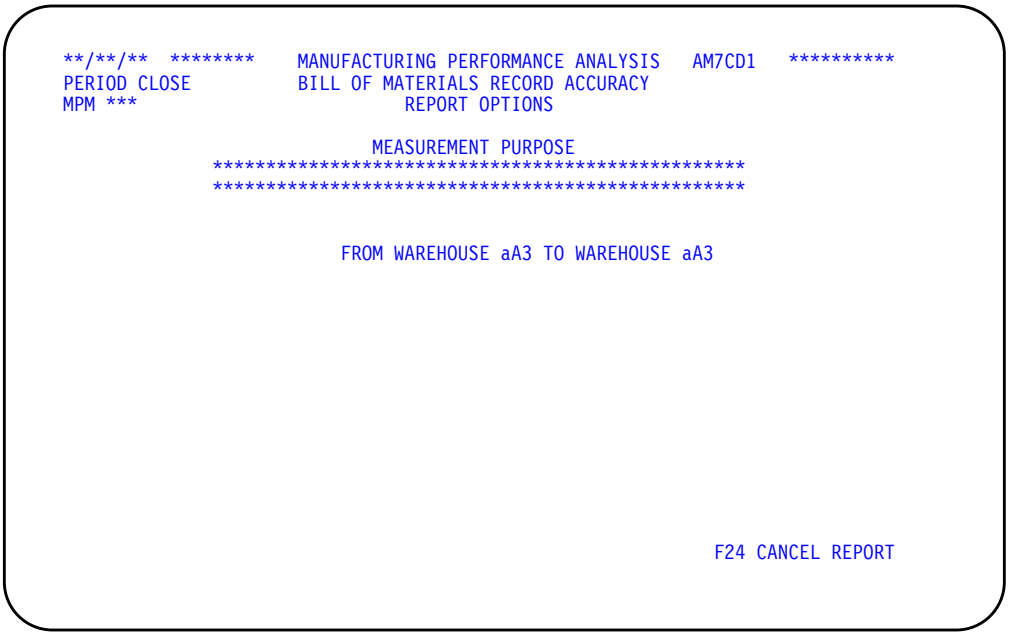
PRINT WAREHOUSE TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want to print totals for each warehouse (general population and all control groups). If you leave these fields blank, all control groups are printed.

PRINT GROUP RECAP (Y OR N). Enter **Y** or **N** to indicate if you want to print the performance for all of the control groups chosen in total.

AM7CD1—Bill of Materials Record Accuracy–Period Close Report Options–MPM 7

This display shows the Period Close report options for MPM 7.

This display appears when you press **Enter** on the Period Close Options display (AM7GE1) and you selected to print reports.



Function keys

F24 CANCEL REPORT cancels printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

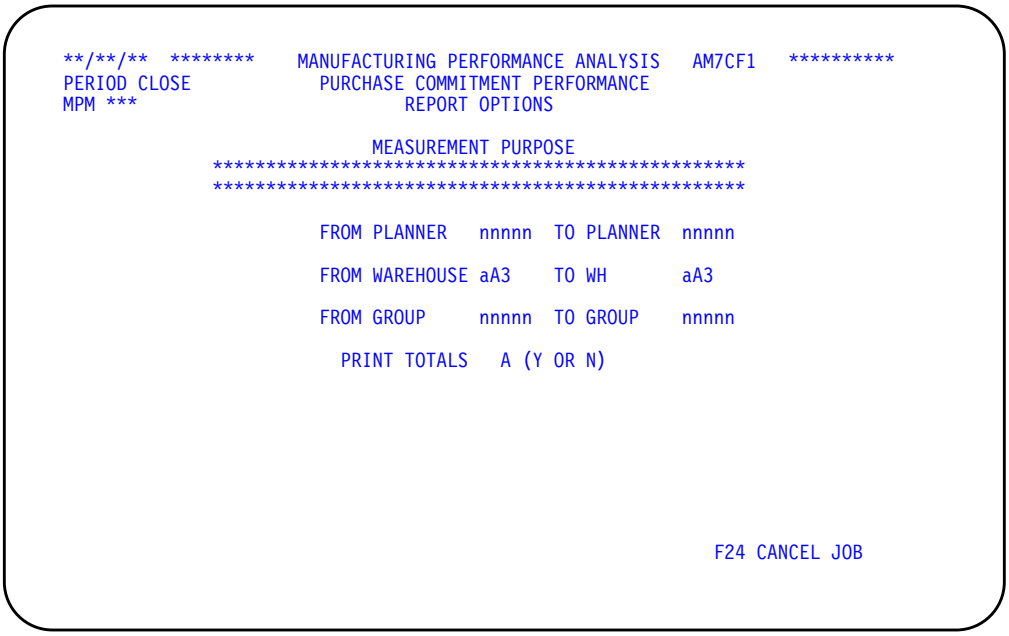
MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

AM7CF1—Purchase Commitment Performance–Period Close Report Options–MPM 8

This display shows the Period Close report options for MPM 8.

This display appears when you press **Enter** on the Period Close Options display (AM7GG1) and you selected to print reports.



Function keys

F24 CANCEL REPORT cancels printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM PLANNER
TO PLANNER. Enter the planner range for which you want the measurement printed. If you leave these fields blank, all planners are printed.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

FROM GROUP
TO GROUP. Enter the group range for which you want the measurement printed. If you leave these fields blank, all groups are printed.

PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed with warehouse totals for all planners.

AM7CH1—Order Reschedule Reliability Performance–Period Close Report Options–MPM 9

This display shows the Period Close report options for MPM 9.

This display appears when you press **Enter** on the Period Close Options display (AM7GI1) and you selected to print reports.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7CH1   **********
PERIOD CLOSE       ORDER RESCHEDULE RELIABILITY PERFORMANCE
MPM ***                        REPORT OPTIONS

                          MEASUREMENT PURPOSE
              ************************************************
              ************************************************

                    FROM PLANNER   nnnnn  TO PLANNER   nnnnn

                    FROM WAREHOUSE aA3    TO WAREHOUSE aA3

                    FROM GROUP     nnnnn  TO GROUP     nnnnn

                    PRINT TOTALS   A   (Y OR N)









                                                    F24 CANCEL JOB
```

Function keys

F24 CANCEL REPORT causes the application to cancel printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM PLANNER
TO PLANNER. Enter the planner range for which you want the measurement printed. If you leave these fields blank, all planners are printed.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

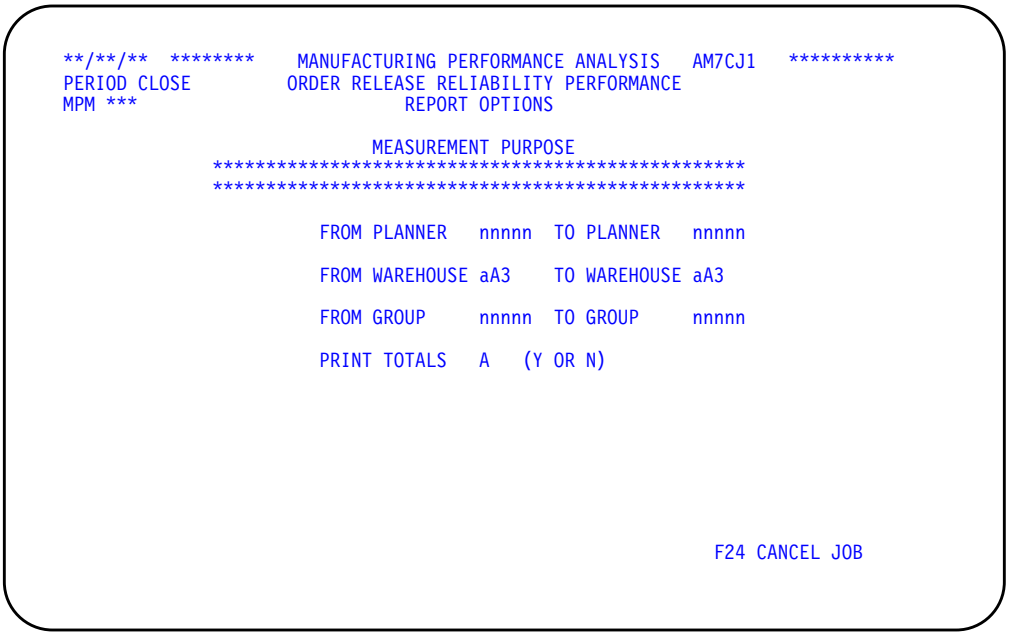
FROM GROUP
TO GROUP. Enter the group range for which you want the measurement printed. If you leave these fields blank, all groups are printed.

PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed with warehouse totals for all planners.

AM7CJ1—Order Release Reliability Performance–Period Close Report Options–MPM 10

This display shows the Period Close report options for MPM 10.

This display appears when you press **Enter** on the Period Close Options display (AM7GL1) and you selected to print reports.



Function keys

F24 CANCEL REPORT causes the application to cancel printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM PLANNER
TO PLANNER. Enter the planner range for which you want the measurement printed. If you leave these fields blank, all planners are printed.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

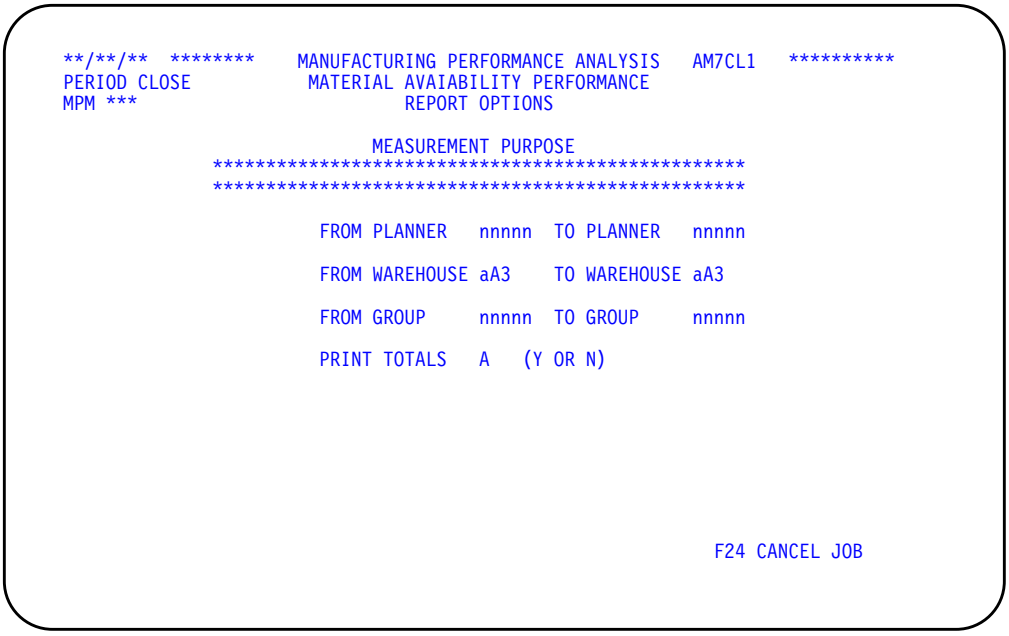
FROM GROUP
TO GROUP. Enter the group range for which you want the measurement printed. If you leave these fields blank, all groups are printed.

PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want to print the measurement for all planners in each warehouse.

AM7CL1—Material Availability Performance–Period Close Report Options–MPM 11

This display shows the Period Close report options for MPM 11.

This display appears when you press **Enter** on the Period Close Report Options display (AM7CH1) and the ***REPORTS TO BE PRINTED AFTER CLOSE*** response is Y.



Function keys

F24 CANCEL REPORT causes the application to cancel printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM PLANNER
TO PLANNER. Enter the planner range for which you want the measurement printed. If you leave these fields blank, all planners are printed.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

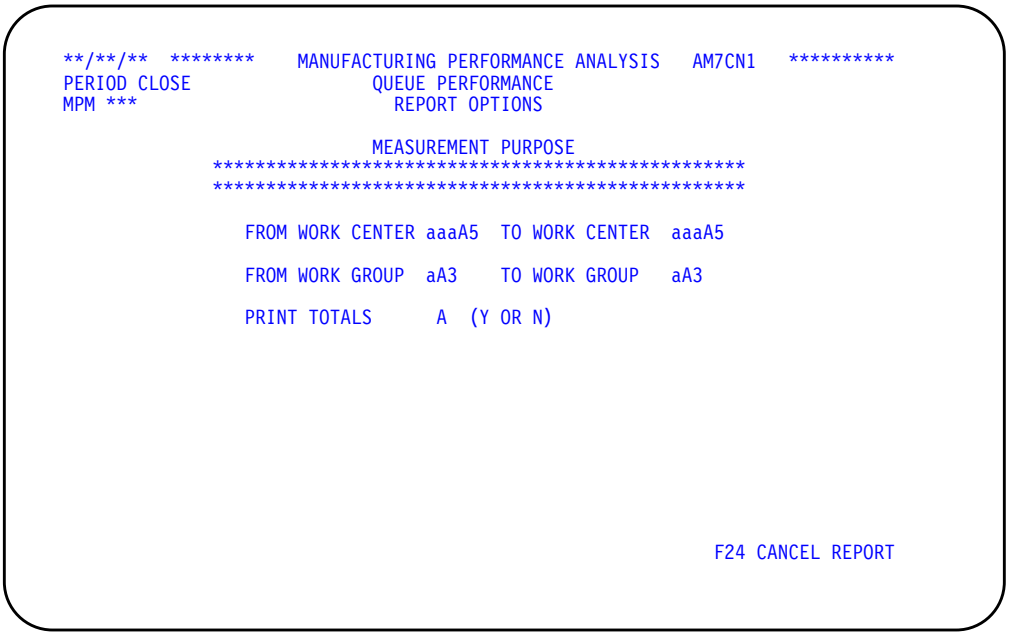
FROM GROUP
TO GROUP. Enter the group range for which you want the measurement printed. If you leave these fields blank, all groups are printed.

PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want to print the measurement for all planners in total in each warehouse.

AM7CN1—Queue Performance–Period Close Report Options–MPM 12

This display shows the Period Close report options for MPM 12.

This display appears when you press **Enter** on the Period Close Options display (AM7GP1) and you selected to print reports.



Function keys

F24 CANCEL REPORT cancels printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM WORK CENTER
TO WORK CENTER. Enter the work center range for which you want the measurement printed. If you leave these fields blank all work centers are printed.

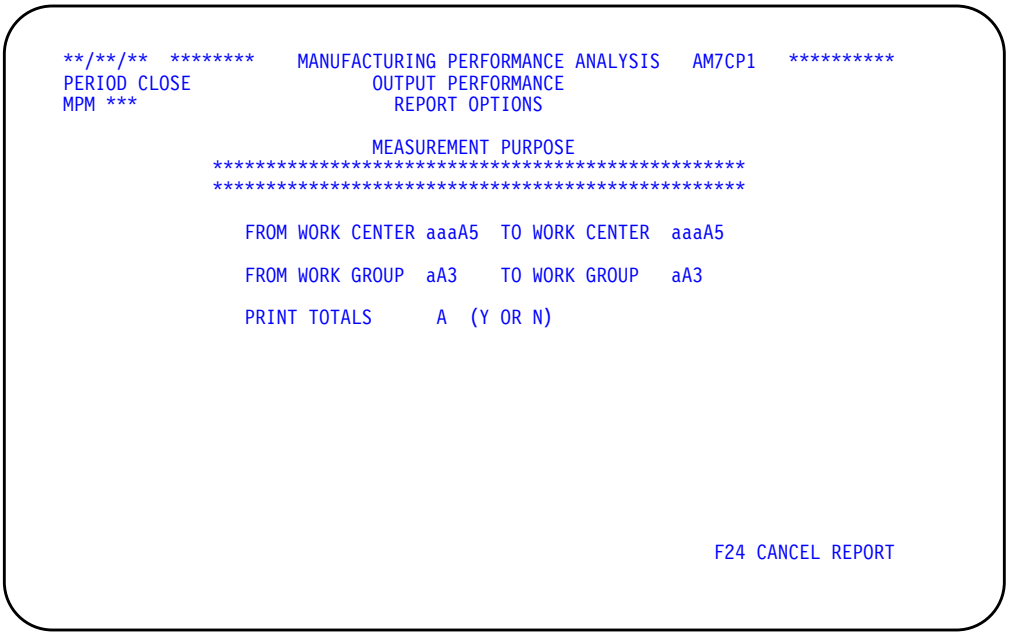
FROM WORK GROUP
TO WORK GROUP. Enter the group range for which you want the measurement printed. If you leave these fields blank, all groups are printed.

PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want to print the measurement for all planners in each warehouse.

AM7CP1—Output Performance–Period Close Report Options–MPM 13

This display shows the Period Close report options for MPM 13.

This display appears when you press **Enter** on the Period Close Report Options display (AM7GP1) and you selected to print reports.



Function keys

F24 CANCEL REPORT cancels printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM WORK CENTER
TO WORK CENTER. Enter the work center range for which you want the measurement printed. If you leave these fields blank, all work centers are printed.

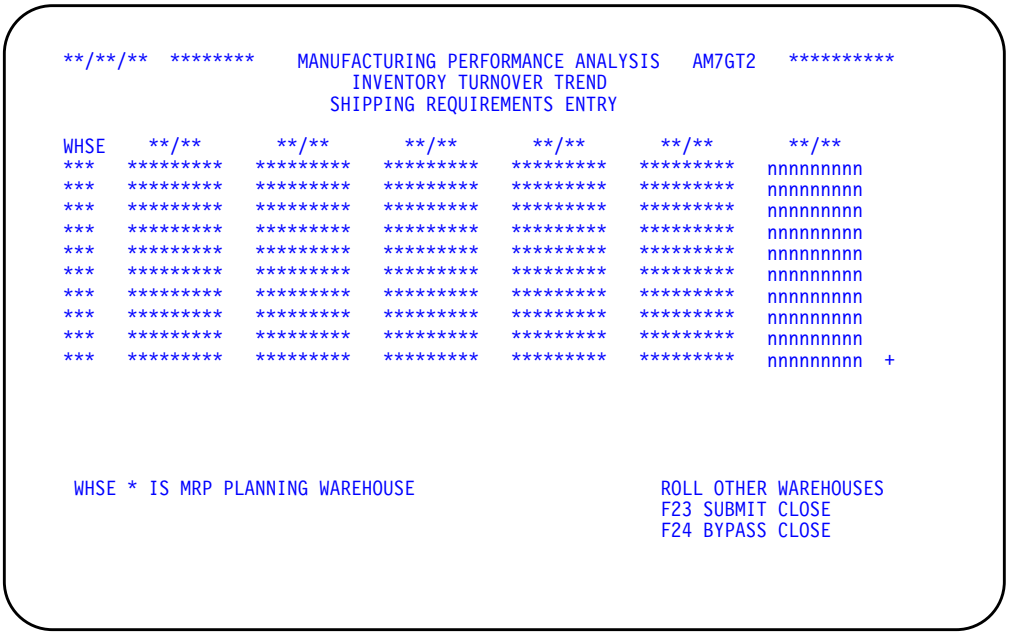
FROM WORK GROUP
TO WORK GROUP. Enter the group range for which you want the measurement printed. If you leave these fields blank, all groups are printed.

PRINT TOTALS (Y OR N). Enter **Y** or **N** to indicate if you want to print the measurement for all work centers in total.

AM7GT2—Inventory Turnover Trend–Shipping Requirements Entry–MPM 14

This display allows you to enter or change forecast information on shipping schedule forecast for each warehouse.

This display appears when you press **Enter** on the Period Close Options display (AM7GT1) and you have non-MRP warehouses or you have tailored MPM 14 not to use MRP Planned Orders and Requirements.



Function keys

ROLL OTHER WAREHOUSES. Use the roll key to proceed to the next group of warehouses or the previous group of warehouses. This only functions if a + sign appears in the lower right corner of the display.

F23 SUBMIT CLOSE causes the forecasts for all warehouses to be accepted and submitted to the next Period Close step. This function key should not be used until the last warehouse forecast entry has been entered.

F24 BYPASS CLOSE causes the close for this measurement to be canceled.

Fields

WHSE. The inventory warehouse that supports the projected shipping schedule.

*****/** (HISTORY).*** The first five columns show history for Shipping Requirements entries for prior periods. These entries cannot be changed.

*****/** (NEW PERIOD).*** The forecasted shipping schedule for three periods in inventory cost dollars for finished goods in this warehouse. The sixth column allows you to enter the new forecasted shipping schedule. The forecast should be for the

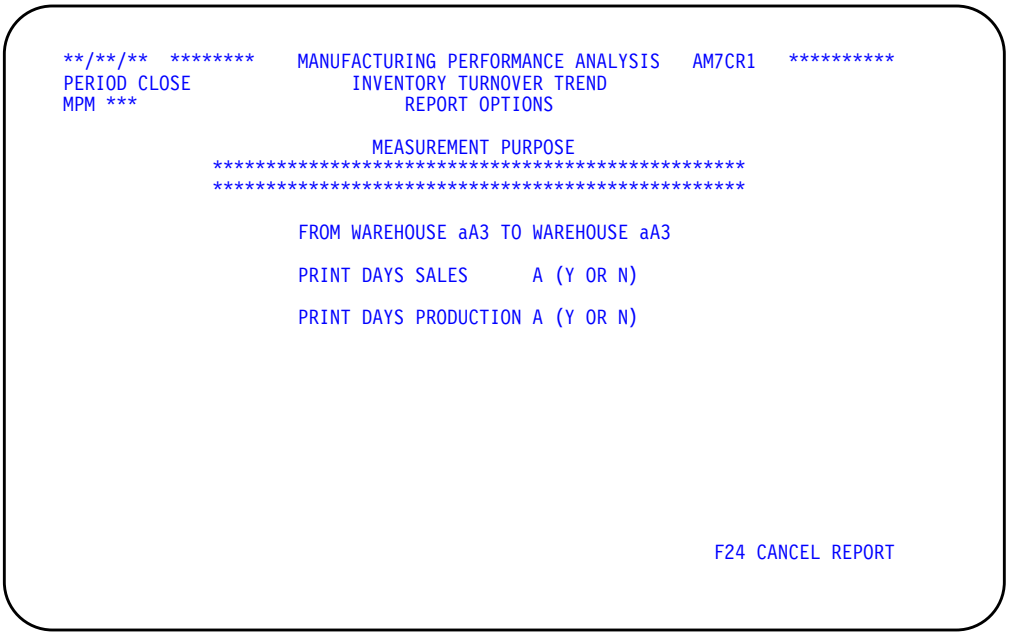
three periods of requirements valued at inventory cost $ for finished goods for each warehouse.

Note: The period dates appear in the (**/**) field.

AM7CR1—Inventory Turnover Trend–Period Close Report Options–MPM 14

This display shows the Period Close report options for MPM 14.

This display appears when you press **F23** on the Shipping Requirements Entry display (AM7GT2) and you selected to print reports.



Function keys

F24 CANCEL REPORT cancels printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

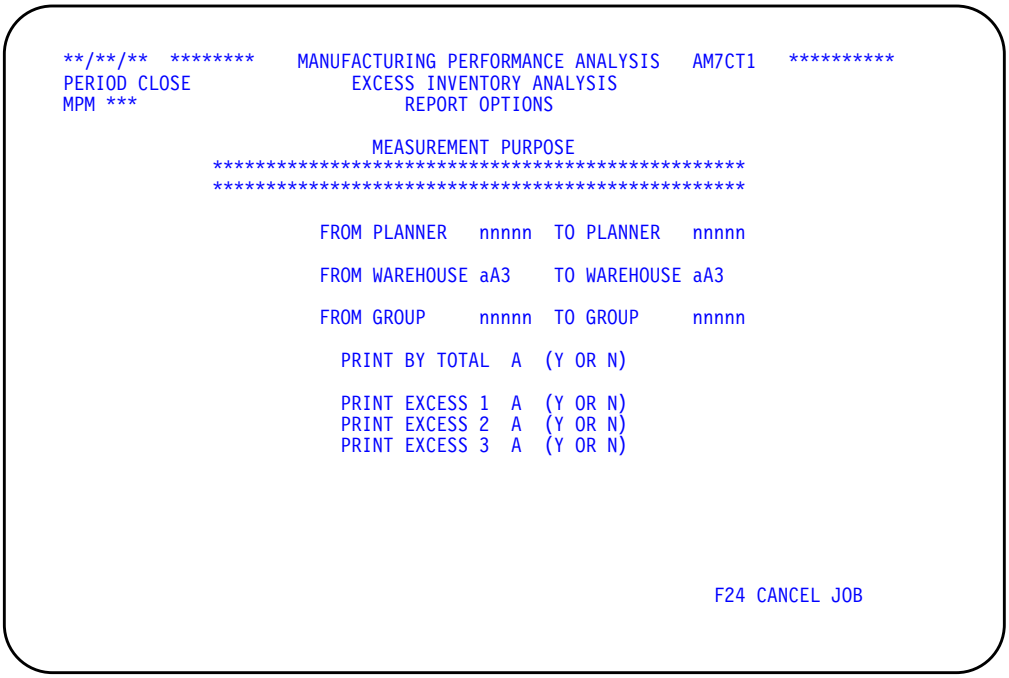
PRINT DAYS SALES (Y OR N). Type in **Y** or **N** to indicate if you want to print the finished goods inventory turnover trend measurement.

PRINT DAYS PRODUCTION (Y OR N). Type in **Y** or **N** to indicate if you want to print the production inventory turnover trend measurement.

AM7CT1—Excess Inventory Analysis–Period Close Report Options–MPM 15

This display shows the Period Close report options for MPM 15.

This display appears when you press **Enter** on the Period Close Options display (AM7GT2) and you selected to print reports.



Function keys

F24 CANCEL REPORT cancels printing reports after Period Close for this measurement.

Fields

MPM (Manufacturing performance measurement). The measurement's identifying number.

MEASUREMENT PURPOSE. The description of the purpose of this measurement from the Measurement Master file.

FROM PLANNER
TO PLANNER. Enter the planner range for which you want the measurement printed. If you leave these fields blank, all planners are printed.

FROM WAREHOUSE
TO WAREHOUSE. Enter the range limits. If you leave these fields blank, all warehouses are printed.

FROM GROUP
TO GROUP. Enter the group range for which you want the measurement printed. If you leave these fields blank, all groups are printed.

PRINT BY TOTAL (Y OR N). Enter **Y** or **N** to indicate if you want the measurement printed for the total inventory for each warehouse.

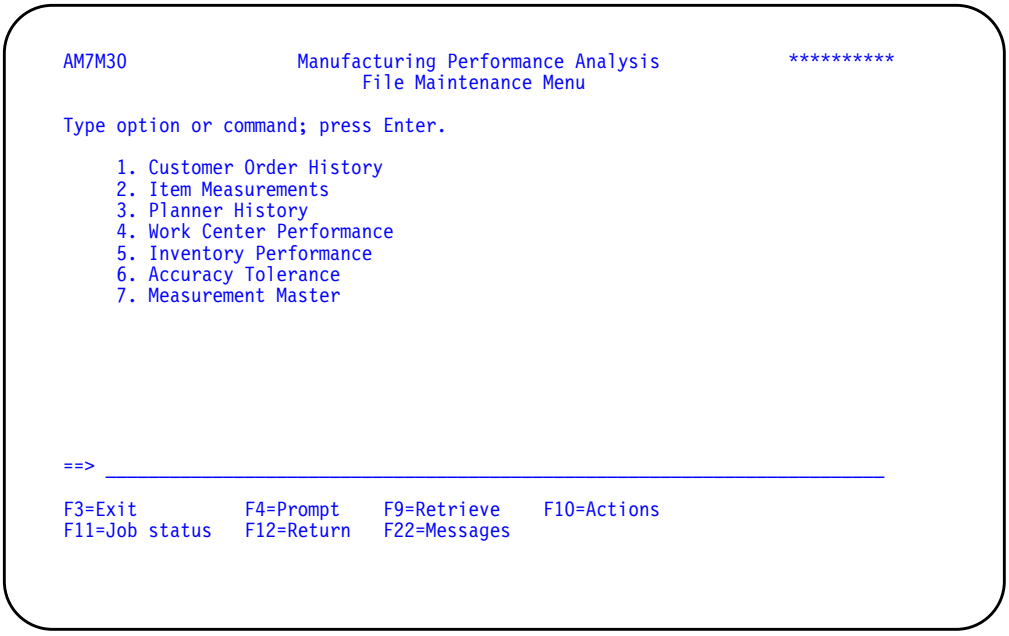
PRINT EXCESS 1
PRINT EXCESS 2
PRINT EXCESS 3 (Y OR N). Enter **Y** or **N** to indicate if you want to print the measurement for excess period 1, 2, or 3.

Chapter 6. File Maintenance

The File Maintenance Menu appears when you select option 5 on the Main Menu.

AM7M30—File Maintenance Menu

This menu allows you to select the file that you want to maintain by adding, changing or deleting the data held in that file.



Option 1. Use this option to select a Customer Order History record to maintain.

Option 2. Use this option to select an Item Measurement record to maintain.

Option 3. Use this option to select a Planner History record to maintain.

Option 4. Use this option to select a Work Center Performance record to maintain.

Note: If EPDM is activated, this option is not available. Refer to “File Maintenance” on page 2-17 for more information.

Option 5. Use this option to select an Inventory Performance record to maintain.

Option 6. Use this option to select a Accuracy Tolerance record to maintain.

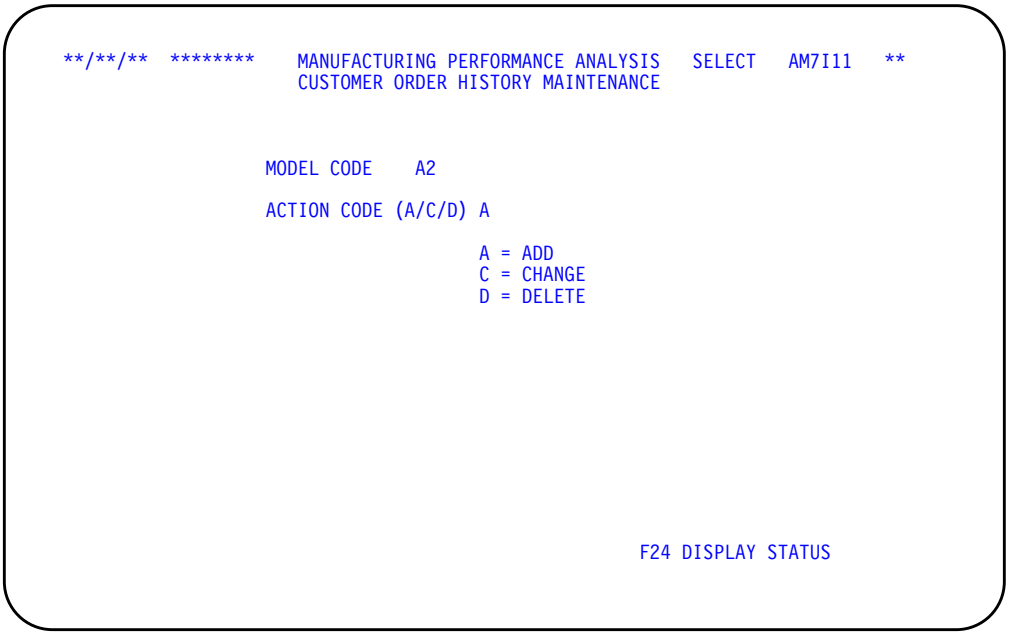
Option 7. Use this option to display the Measurement Master Maintenance Selection display.

Option 1: Customer Order History

AM7I11—Customer Order History Maintenance (Select)

This display allows you to select the model code for the record that you want to maintain.

This display appears when you select option 1 on the File Maintenance menu.



Function keys

F24 DISPLAY STATUS causes the File Maintenance Update Status display (AM7I18) to appear.

Fields

MODEL CODE. Type in the three-digit code for the product model to be maintained.

ACTION CODE (A/C/D). Enter one of the following:

A Add a record
C Change a record
D Delete a record

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AM7I12—Customer Order History Maintenance (Add/Change/Delete)

This display shows the customer order history data for the selected model code.

Display AM7I12 appears when you make a selection and press **Enter** on display AM7I11.

```
 **/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   ******   AM7I12   **
                       CUSTOMER ORDER HISTORY MAINTENANCE
  MODEL CODE  ****  MODEL NAME  aaaaaaaaaaaaaaaaaaaaaaA25

            ----------------- PLAN -----------------    ---- ACTUAL ----
 PERIOD        BOOK $              BOOK UNITS              BOOKED $
                DEVIATION $         DEVIATION UNITS         BOOKED UNITS
  nnnn      nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnnn
             nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnn
  nnnn      nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnnn
             nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnn
  nnnn      nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnnn
             nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnn
  nnnn      nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnnn
             nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnn
  nnnn      nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnnn
             nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnn
  nnnn      nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnnn
             nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnn
  nnnn      nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnnn
             nnnnnnnnnnn         nnnnnnnnnnn             nnnnnnnnnn
                                                        USE ROLL UP/DOWN
                                                        F03 ADDITIONAL DATA
                                                        F19 RETURN TO SELECT
```

Function keys

USE ROLL UP/DOWN causes the history for earlier or later periods to appear.

F03 ADDITIONAL DATA causes additional data for each period to appear.

F19 RETURN TO SELECT causes any entry to be ignored and the Customer Order History Maintenance Selection display (AM7I11) to appear.

Fields

MODEL CODE. Product model code indicating a product model group.

MODEL NAME. Model name for the model code. If you are adding a model code, you should enter the model name.

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

Note: An additional level of security is required to maintain the following performance history data.

PLAN BOOK $. Forecasted customer order bookings in sales dollars for this model for each period.

PLAN $ DEVIATION. The absolute value of the changes made to the plan bookings in sales dollars while the period was a forecast period.

PLAN BOOK UNITS. The forecasted customer order bookings in units for this model for each period.

PLAN UNIT DEVIATION. The absolute value of the changes made to the plan bookings in units while the period was a forecast period.

ACTUAL BOOKED $. The sales dollar value of all customer orders entered during the period for this product model.

ACTUAL BOOKED UNIT. The total number of units of all customer orders entered during the period for this product model.

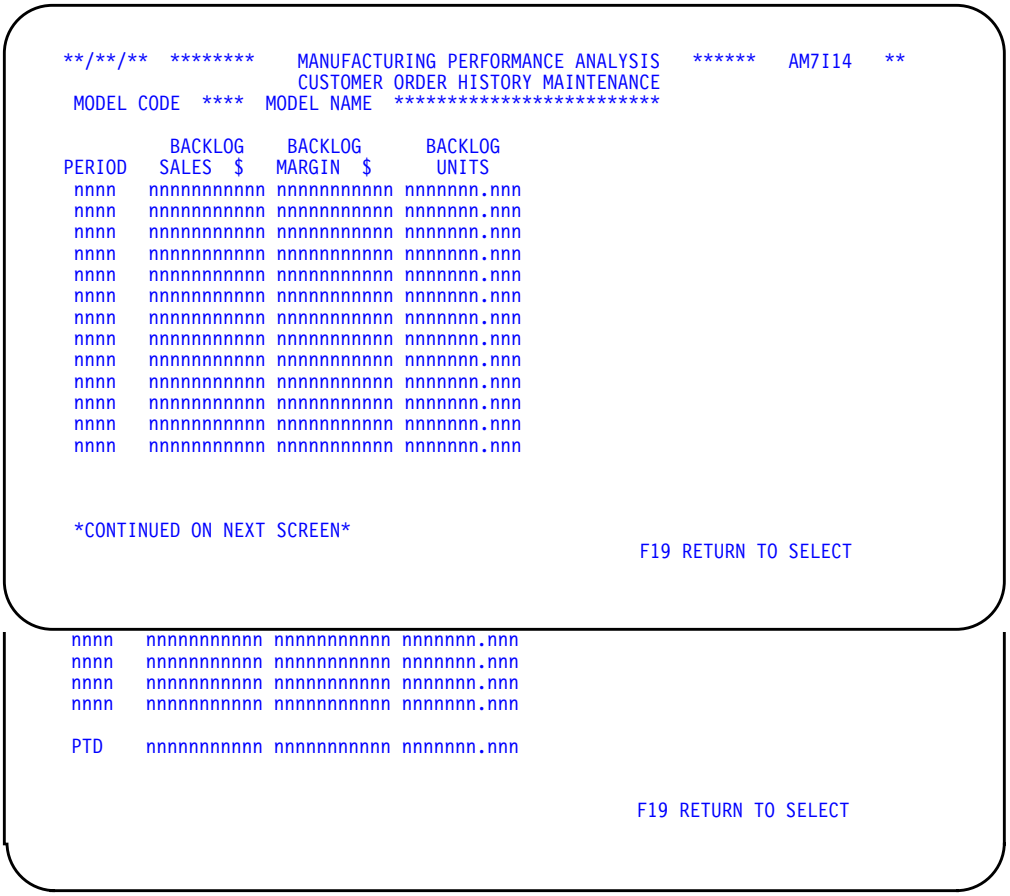
BOOKED $ PTD. Appears only when you use the **ROLL UP** key. Total sales dollar value of customer orders entered during the current period for this model. This field is updated by Close Simulation only.

BOOKED UNITS PTD. Appears only when you use the **ROLL UP** key. Total units of this model booked to customer orders during the current period. This field is updated by Close Simulation only.

AM7I14, AM7I15—Customer Order History Maintenance (Add/Change/Delete)

These displays show the performance history data for the selected model code.

Display AM7I14 appears when you press **Enter** on display AM7I12. Display AM7I15 shows the remaining periods and fields. It appears when you press **Enter** on AM7I14.



Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Customer Order History Maintenance Selection display (AM7I11) to appear.

Fields

MODEL CODE. Product model code indicating a product model group.

MODEL NAME. Model name for the model code. If you are adding a model code or performing initial maintenance, you should enter the model name.

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

BACKLOG SALES $. Total customer order backlog in sales dollars for this model.

BACKLOG MARGIN $. Total customer order backlog in profit margin dollars for this model.

BACKLOG UNITS. Total customer order backlog in units for this model.

PTD. Appears only on display AM7I15. Period-to-date values for all the backlog fields. These fields can only be updated by Close Simulation.

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AM7I16—Customer Order History Maintenance (Add/Change/Delete)

This display shows the performance history data for the selected model code.

Display AM7I16 appears when you press **Enter** on display AM7I15.

```
 **/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   ******   AM7I16   **
                       CUSTOMER ORDER HISTORY MAINTENANCE
  MODEL CODE  **    MODEL NAME  *************************

         *P/DUE BACKLOG BY REQUEST DATE*      *P/DUE BACKLOG BY MFG SCHED DATE*
PERIOD       SALES $         MARGIN $             SALES $          MARGIN $
 nnnn      nnnnnnnnnnn-  nnnnnnnnnnn-          nnnnnnnnnnn-   nnnnnnnnnnn-
                   UNITS nnnnnnn.nnn-                  UNITS  nnnnnnn.nnn-
 nnnn      nnnnnnnnnnn-  nnnnnnnnnnn-          nnnnnnnnnnn-   nnnnnnnnnnn-
                   UNITS nnnnnnn.nnn-                  UNITS  nnnnnnn.nnn-
 nnnn      nnnnnnnnnnn-  nnnnnnnnnnn-          nnnnnnnnnnn-   nnnnnnnnnnn-
                   UNITS nnnnnnn.nnn-                  UNITS  nnnnnnn.nnn-
 nnnn      nnnnnnnnnnn-  nnnnnnnnnnn-          nnnnnnnnnnn-   nnnnnnnnnnn-
                   UNITS nnnnnnn.nnn-                  UNITS  nnnnnnn.nnn-
 nnnn      nnnnnnnnnnn-  nnnnnnnnnnn-          nnnnnnnnnnn-   nnnnnnnnnnn-
                   UNITS nnnnnnn.nnn-                  UNITS  nnnnnnn.nnn-
 nnnn      nnnnnnnnnnn-  nnnnnnnnnnn-          nnnnnnnnnnn-   nnnnnnnnnnn-
                   UNITS nnnnnnn.nnn-                  UNITS  nnnnnnn.nnn-
 nnnn      nnnnnnnnnnn-  nnnnnnnnnnn-          nnnnnnnnnnn-   nnnnnnnnnnn-
                   UNITS nnnnnnn.nnn-                  UNITS  nnnnnnn.nnn-

                                                          USE ROLL UP/DOWN
                                                          F03 FOLD
                                                          F19 RETURN TO SELECT
```

Function keys

USE ROLL UP/DOWN causes the history for later or earlier periods to appear.

F03 FOLD causes additional data for each period to appear.

F19 RETURN TO SELECT causes any entry to be ignored and the Customer Order History Maintenance Selection display (AM7I11) to appear.

Note: Use of this function key does not update maintenance.

Fields

MODEL CODE. Product model code indicating a product model group.

MODEL NAME. Model name for the model code. If you are adding a model code, you should enter the model name.

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

P/DUE BACKLOG BY REQUEST DATE. All values are based on the customer order request date.

SALES $. Total past due customer order backlog in sales dollars.
MARGIN $. Total past due customer order backlog in profit margin dollars.
UNITS. Total past due customer orders backlog in units.

P/DUE BACKLOG BY MFG SCHED DATE. All values are based on the customer order manufacture schedule date.

SALES $. Total past due customer order backlog in sales dollars.
MARGIN $. Total past due customer order backlog in profit margin dollars.
UNITS. Total past due customer orders backlog in units.

PTD. Appears only when you use the **ROLL UP** key. Period-to-date values for all the backlog history fields. These fields are updated by Close Simulation.

AM7I18—Customer Order History Maintenance (Status)

This display shows the status of the Customer Order History Maintenance

This display appears when you press **F24** on display AM7I11.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   STATUS   AM7I18   **
                      CUSTOMER ORDER HISTORY MAINTENANCE



SESSION STATUS
 RECORDS ADDED     *******              RECORDS DELETED        *******
 RECORDS CHANGED   *******



                                                      ENTER TO CONTINUE
                                                      F24 END OF JOB
```

Function keys

F24 END OF JOB ends the session and the File Maintenance menu (AM7M30) appears again.

Fields

RECORDS ADDED. The number of records added during this session.

RECORDS CHANGED. The number of records changed during this session.

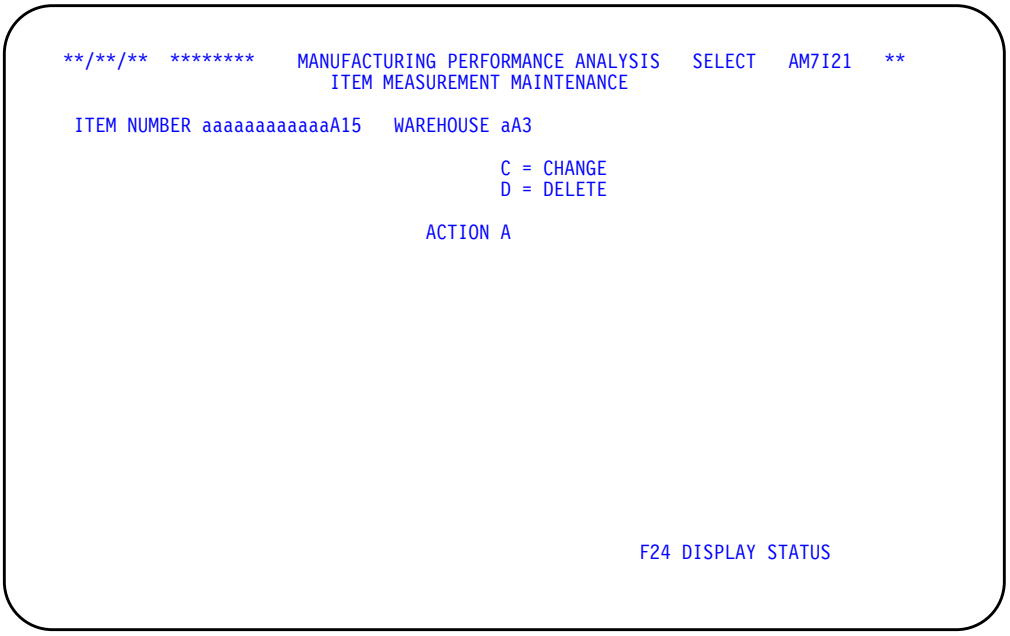
RECORDS DELETED. The number of records deleted during this session.

Option 2: Item Measurements

AM7I21—Item Measurement Maintenance (Select)

This display allows you to select the Item Measurement record you want to maintain either by adding or changing data field entries.

This display appears when you select option 2 on the File Maintenance menu.



Function keys

F24 DISPLAY STATUS causes the File Maintenance Update Status display (AM7I23) to appear.

Fields

ITEM NUMBER. Type in the item number for the record you want to maintain.

WAREHOUSE. Type in the warehouse number for the Item record you want to maintain.

ACTION. Enter one of the following codes:

C Change a record
D Delete a record

AM7I22—Item Measurement Maintenance (Change/Delete)

This display shows the performance history data for the selected Item Number.

This display appears when you press **Enter** on display AM7I21.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   ******   AM7I22   **
                         ITEM MEASUREMENT MAINTENANCE

ITEM NUMBER  ***************  ******************************  WAREHOUSE ***
PLANNER       *****   ITEM TYPE  *     ITEM CLASS  **     UNIT OF MEASURE  **

MODEL CODE aaA4 MASTER SCHEDULE ITEM A  FINISHED GOODS ITEM A  CONTROL GROUP aA3

BILL OF MATERIAL TOLERANCE CODE   aA3  CYCLE COUNT TOLERANCE CODE           aA3

                  QUANTITY    DEVIATION    BOOK VALUE   DEVIATION   POST DATE
CYCLE COUNT 1:  nnnnnnnnnn   nnnnnnnnnn    nnnnnnnnnnn  nnnnnnnnnn  nnnnnn
CYCLE COUNT 2:  nnnnnnnnnn   nnnnnnnnnn    nnnnnnnnnnn  nnnnnnnnnn  nnnnnn
CYCLE COUNT 3:  nnnnnnnnnn   nnnnnnnnnn    nnnnnnnnnnn  nnnnnnnnnn  nnnnnn
ADJUST DATE     nnnnnn  COUNT ACCURATE FLAG A  CYCLE CONTROL NUMBER  nnn

NUMBER OF BILLS ACCURATE  nnnnn    NUMBER OF BILLS AUDITED   nnnnn
DATE OF LAST BILL AUDIT  nnnnnn
EXCESS INVENTORY:  1ST  nnnnnnnnnn  2ND  nnnnnnnnnn  3RD  nnnnnnnnnn




                                                    F19 RETURN TO SELECT
```

Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Item Measurement Maintenance Selection display (AM7I21) to appear.

Note: Use of this function key does not update maintenance.

Fields

ITEM NUMBER. Alphanumeric item number from Item Master file.

WAREHOUSE. Item balance warehouse code.

PLANNER. The planner number assigned to this item in the Item Balance file.

ITEM TYPE. Item type code from Item Master file.

ITEM CLASS. Item class code from Item Master file.

UNIT OF MEASURE. The stocking unit of measure from Item Master file.

MODEL CODE. Enter the product model or group to which this item belongs. This field is used by MPM 1, and MPM 2.

MASTER SCHEDULE ITEM. Enter **Y** if this item is a master schedule item. If not a master schedule item, enter **N**. This field defaults to Y if the item's low level code is 00, or the Master Schedule Item Code in the Item Master file is M.

FINISHED GOODS ITEM. Enter **Y** if this item is considered as finished goods when in inventory. This code is used by MPM 5 and MPM 14.

CONTROL GROUP. Enter an alphanumeric value for the cycle count control group for this item. This code is used by cycle counting for item selection and recounting. Item must have a nonzero value in this field to be included in a control group. This field is used to show MPM 6.

BILL OF MATERIAL TOLERANCE CODE. Enter the accuracy tolerance code that represents a percent value maintained in the Accuracy Tolerance file. This is a required entry field and must contain a valid accuracy tolerance code or a blank. The default value is 0, which is plus or minus 0%. MPM 7 period close uses the value that this code represents to determine if the expected usage of this item in the Product Structure file is accurate. An accurate record is one whose the expected usage is equal to the actual usage, or the expected usage is no greater than the actual usage by an amount equal to the tolerance allowance amount.

CYCLE COUNT TOLERANCE CODE. Enter the accuracy tolerance code that represents a percent value maintained in the Accuracy Tolerance file. This is a required entry field and must contain a valid accuracy tolerance code. The default value is 0, which is plus or minus 0%. Cycle counting uses the value that this code represents to determine if an inventory record is accurate. An accurate record is one whose actual count is not more or less than the on-hand balance by an amount equal to the tolerance allowance amount.

CYCLE COUNT 1
CYCLE COUNT 2
CYCLE COUNT 3. The first, second, and third count results.

QUANTITY. Quantity counted for the last cycle count. This field is maintained by cycle counting.

DEVIATION. The deviation between the Inventory record and the counted quantity for each count. This field is maintained by cycle counting.

BOOK VALUE. The Inventory Balance record for each of the counts. This field is maintained by cycle counting.

DEVIATION. The inventory cost value of the deviation between the Inventory record and the counted quantity for each count. This field is maintained by cycle counting.

POST DATE. The date when the last cycle count compare was performed for each count. This field is maintained by cycle counting.

ADJUST DATE. The last date when the Item Balance record was adjusted.

COUNT ACCURATE FLAG. Alphanumeric flag set by cycle counting to indicate that the first count of the last cycle count was within the accuracy tolerance. A blank field indicates that the item was not counted during the current period. N indicates an inaccurate count, and a Y indicates an accurate count. This field is maintained by cycle counting and period close.

CYCLE CONTROL NUMBER. System-assigned number used when selecting items to be counted on second and third counts Count Select (menu AM7M40, option 1) and when adjusting inventory balances during Inventory Adjustment (AM7M40, option 4).

NUMBER OF BILLS ACCURATE. The number of orders for the item that were closed during the last period as defined in MPM 7 that had an accurate bill of material. This field is maintained by period close.

NUMBER OF BILLS AUDITED. The number of orders for this item that were closed during the last period. This field is maintained by period close.

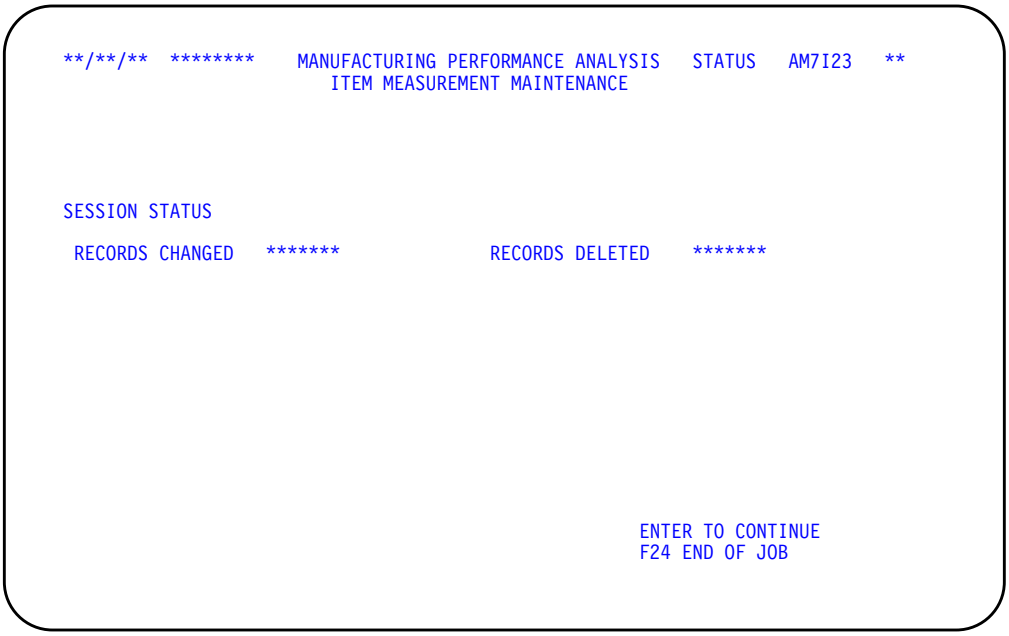
DATE OF LAST BILL AUDIT. The date when the last MPM 7 period close updated this record.

EXCESS INVENTORY. The value of stocked inventory classified as excess for each excess period (first, second, third) defined in the Measurement Master record for MPM 15. This field is maintained by period close.

AM7I23—Item Measurement Maintenance (Status)

This display shows the status of the Item Measurement Maintenance file session and is used to end the job.

This display appears when you press **F24** on display AM7I21.



Function keys

F24 END OF JOB ends the session and the File Maintenance menu (AM7M30) appears again.

Fields

RECORDS CHANGED. The number of records changed during this session.

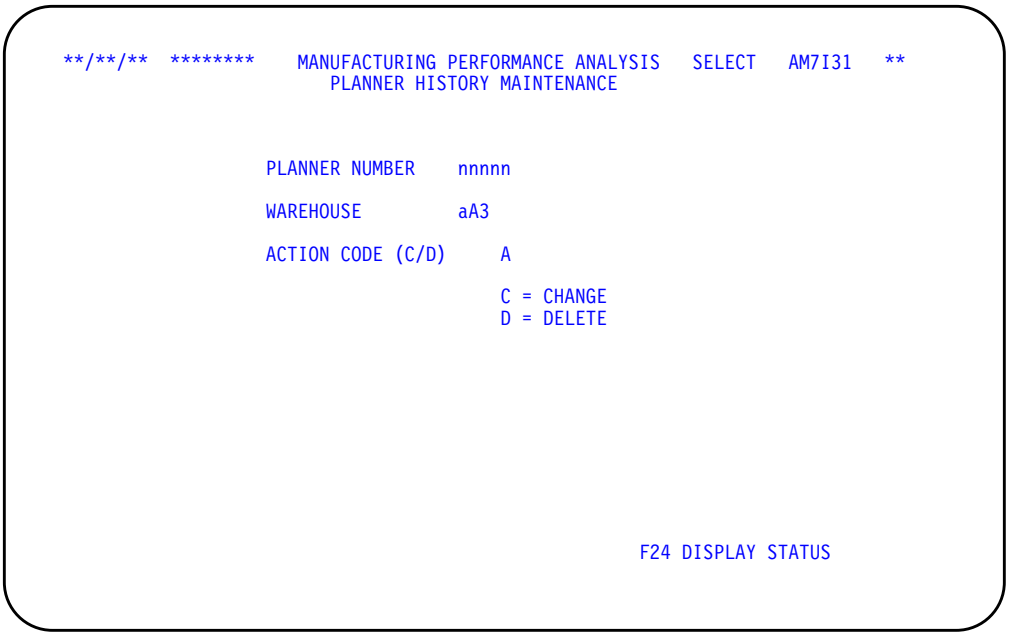
RECORDS DELETED. The number of records deleted during this session.

Option 3: Planner History

AM7I31—Planner History Maintenance (Select)

This display allows you to select the Planner History record that you want to maintain.

This display appears when you select option 3 on the File Maintenance menu.



Function keys

F24 DISPLAY STATUS causes the File Maintenance Update Status display (AM7I3G) to appear.

Fields

PLANNER NUMBER. Enter the planner number for the Planner History record to be maintained.

WAREHOUSE. Type in the warehouse for the planner history record to be maintained.

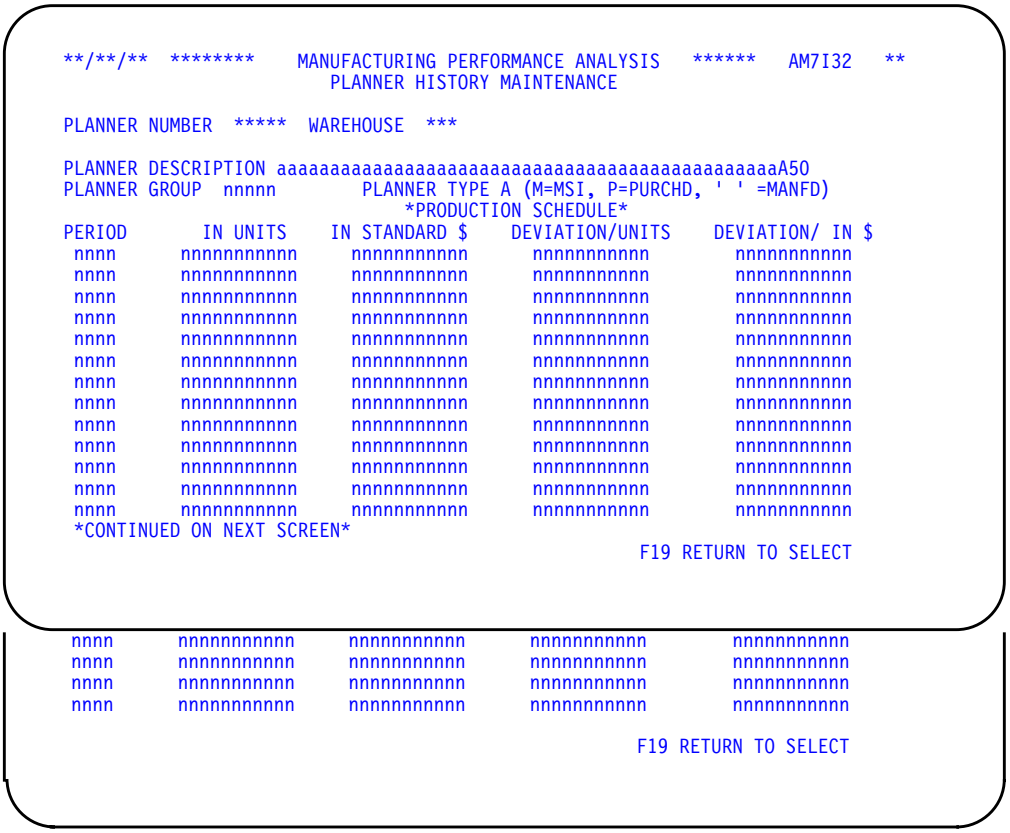
ACTION CODE (C/D). Enter one of the following:

C Change a record
D Delete a record

AM7I32, AM7I33—Planner History Maintenance (Change/Delete)

These displays allow you to change the performance history data for the selected planner number.

Display AM7I32 appears when you press **Enter** on the Planner History Maintenance (Select) display (AM7I31). Display AM7I33 appears showing the remaining periods and fields when you press **Enter** on AM7I32.



F19 RETURN TO SELECT causes any entry to be ignored and the Planner History Maintenance Selection display (AM7I31) to appear.

Note: Use of this function key does not update maintenance.

Fields

PLANNER NUMBER. Planner number for the history being changed or deleted.

WAREHOUSE. The warehouse number for the planner history record being changed or deleted.

PLANNER DESCRIPTION. Enter the classification or description for this planner number.

PLANNER GROUP. Enter the group to which this planner number belongs.

PLANNER TYPE. Enter the predominant type of item with this planner number assigned.

blank Manufactured or other items
M Master schedule items
P Purchased items

PERIOD. History period and forecast period numbers. The lowest numbered period is the oldest period and the highest numbered period is the most recent period or the most distant forecast period.

Note: An additional level of security is required to maintain the following performance history data.

PRODUCTION SCHEDULE. Total scheduled receipts for items with this planner number for that were overdue during the period.

IN UNITS. Total scheduled receipts in units.

IN STANDARD $. Total scheduled receipts in inventory dollars.

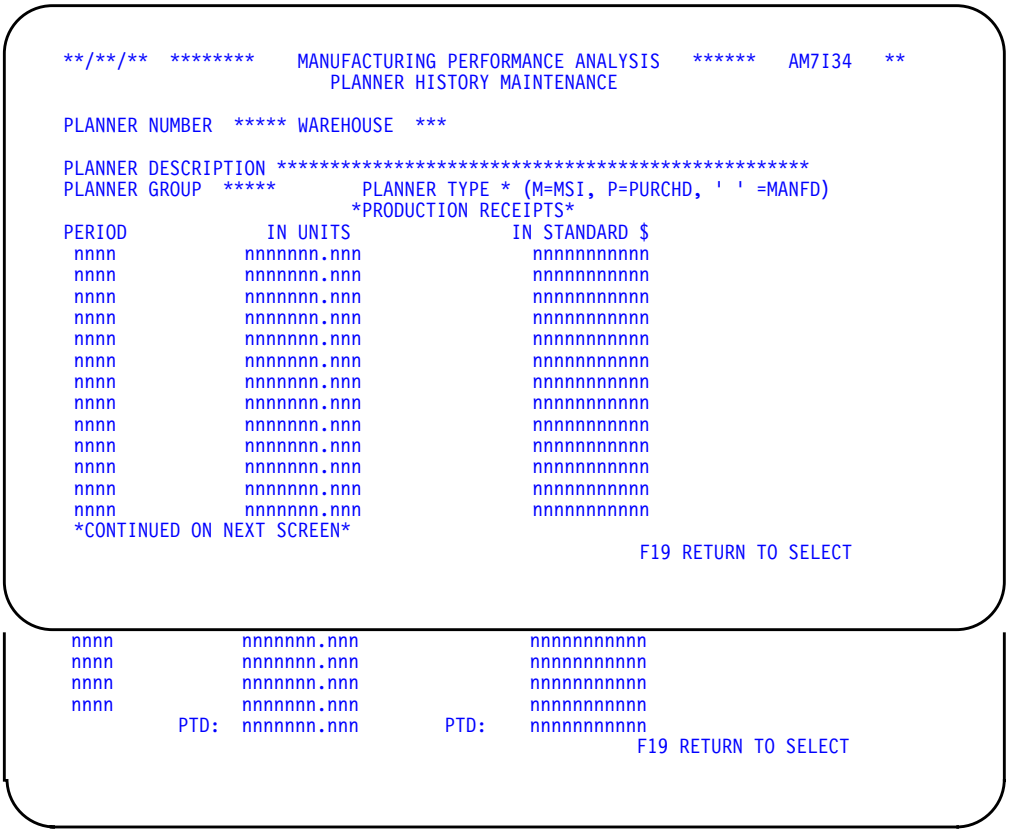
DEVIATION/UNITS. Total absolute value at the changes to production schedule in units.

DEVIATION/ IN $. Total absolute value of the changes to the production schedule in inventory dollars.

AM7I34, AM7I35—Planner History Maintenance (Change/Delete)

These displays allow you to change the performance history data for the selected planner number.

Display AM7I34 appears when you press **Enter** on the Planner History Maintenance (Change) display (AM7I33). Display AM7I35 appears showing the remaining periods and fields when you press **Enter** on AM7I34.



Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Planner History Maintenance Selection display (AM7I31) to appear.

Note: Use of this function key does not update maintenance.

Fields

PLANNER NUMBER. Planner number for the history being shown.

WAREHOUSE. The warehouse number for the planner history record being changed or deleted.

PLANNER DESCRIPTION. The description for this planner number.

PLANNER GROUP. The group to which this planner number belongs.

PLANNER TYPE. The predominant type of item with this planner number assigned.

blank Manufactured or other items
M Master schedule items
P Purchased items

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

PRODUCTION RECEIPTS. Total receipts to stock for each period for this planner number.

IN UNITS. Total units received to stock for each period for this planner number.

IN STANDARD $. Total dollar value of receipts to stock for each period in inventory cost dollars.

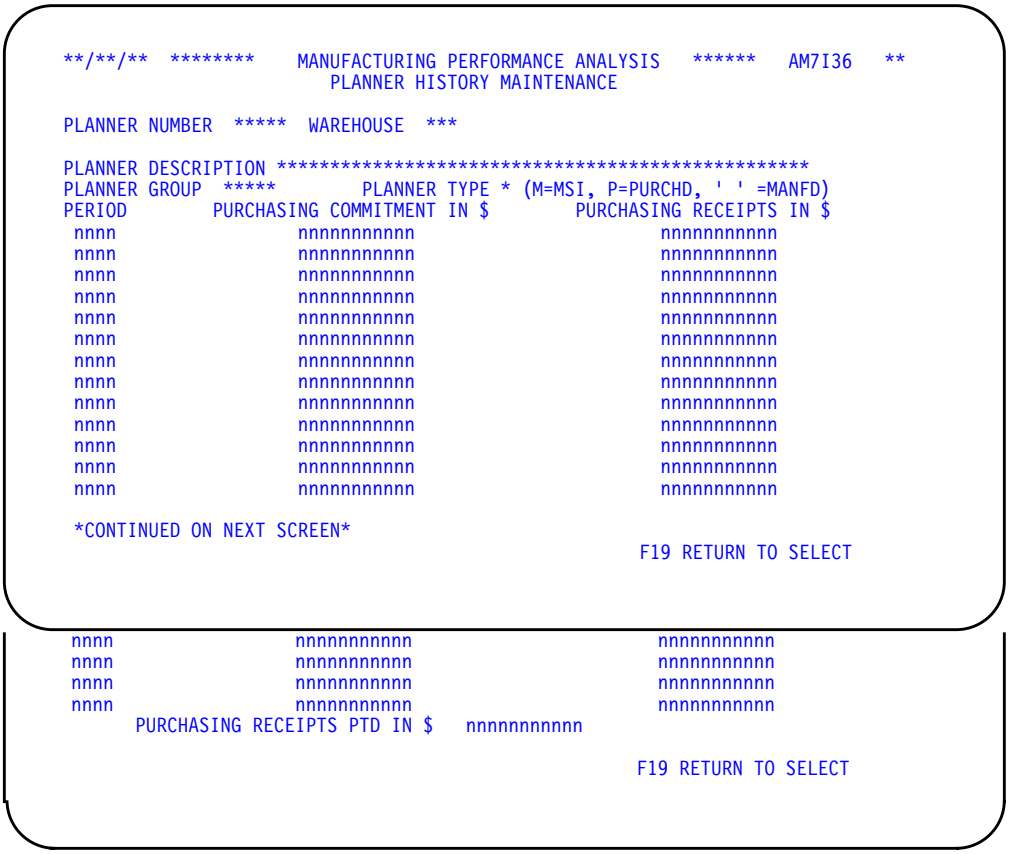
Note: The following field appears only on display AM7I35.

PTD. Period-to-date receipts units and dollars. These fields are only updated by Close Simulation.

AM7I36—Planner History Maintenance (Change/Delete)

This display allows you to change the performance history data for the selected planner number.

Display AM7I36 appears when you press **Enter** on the Planner History Maintenance (Change) display (AM7I35). Display AM7I37 appears showing the remaining periods and fields when you press **Enter** on AM7I36.



Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Planner History Maintenance Selection display (AM7I31) to appear.

Note: Use of this function key does not update maintenance.

Fields

PLANNER NUMBER. Planner number for the history being shown.

WAREHOUSE. The warehouse number for the planner history record being changed or deleted.

PLANNER DESCRIPTION. The classification description for this planner number.

PLANNER GROUP. The group to which this planner number belongs.

PLANNER TYPE. The predominant type of item with this planner number assigned.

blank Manufactured or other items
M Master schedule items
P Purchased items

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

PURCHASE COMMITMENT IN $. Inventory cost value of all open purchase orders for this planner number due to stock during each period.

PURCHASING RECEIPTS IN $. Inventory cost value of each period's purchase receipts for this planner number.

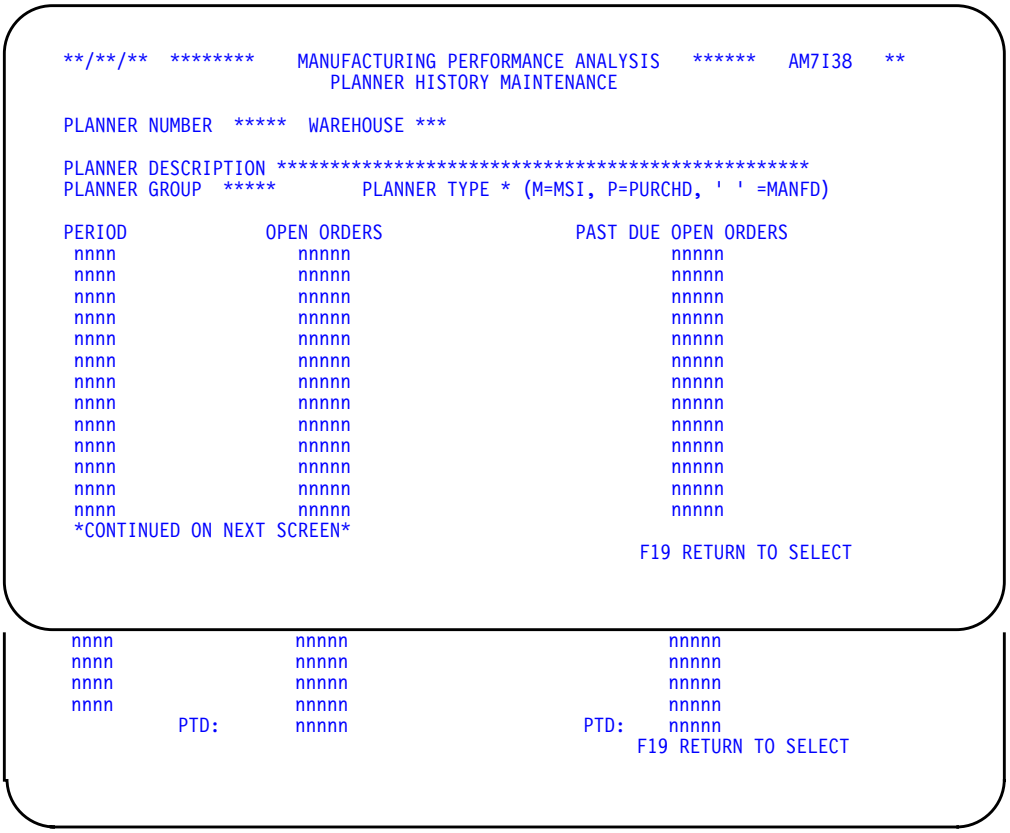
Note: The following field appears only on display AM7I37.

PURCHASING RECEIPTS PTD IN $. Inventory cost of all current period purchase receipts for this planner number. This field is updated only by Close Simulation.

AM7I38, AM7I39—Planner History Maintenance (Change/Delete)

These displays allow you to change the performance history data for the selected planner number.

Display AM7I38 appears when you press **Enter** on the Planner History Maintenance (Change) display (AM7I37). Display AM7I39 appears showing the remaining periods and fields when you press **Enter** on AM7I38.



Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Planner History Maintenance Selection display (AM7I31) to appear.

Note: Use of this function key does not update maintenance.

Fields

PLANNER NUMBER. Planner number for the history being shown.

PLANNER DESCRIPTION. The classification description for this planner number.

PLANNER GROUP. The group to which this planner number belongs.

WAREHOUSE. The warehouse number for the planner history record being changed or deleted.

PLANNER TYPE. The predominant type of item with this planner number assigned.

blank Manufactured or other items
M Master schedule items
P Purchased items

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

OPEN ORDERS. Total number of orders for this planner that were due prior to the end of the period.

PAST DUE OPEN ORDERS. Total number or orders for this planner number that were past due.

Note: The following field appears only on display AM7I39.

PTD. Total current period open orders and number of past due open orders. These fields can be updated only by Close Simulation.

AM7I3A, AM7I3B—Planner History Maintenance (Change/Delete)

These displays allow you to change the performance history data for the selected planner number.

Display AM7I3A appears when you press **Enter** on the Planner History Maintenance (Change) display (AM7I39). Display AM7I3B appears showing the remaining periods and fields when you press **Enter** on AM7I3A.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   ******   AM7I3A   **
                         PLANNER HISTORY MAINTENANCE

PLANNER NUMBER  *****  WAREHOUSE  ***

PLANNER DESCRIPTION **************************************************
PLANNER GROUP  *****        PLANNER TYPE * (M=MSI, P=PURCHD, ' ' =MANFD)

PERIOD             RELEASED ORDERS               RELEASED ORDERS ON-TIME
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 *CONTINUED ON NEXT SCREEN*
                                                  F19 RETURN TO SELECT
```

```
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
 nnnn                 nnnnn                          nnnnn
              PTD:    nnnnn                  PTD:    nnnnn
                                                  F19 RETURN TO SELECT
```

Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Planner History Maintenance Selection display (AM7I31) to appear.

Note: Use of this function key does not update maintenance.

Fields

PLANNER NUMBER. Planner number for the planner history being shown.

PLANNER DESCRIPTION. The classification description for this planner number.

PLANNER GROUP. The group to which this planner number belongs.

WAREHOUSE. The warehouse number for the planner history record being changed or deleted.

PLANNER TYPE. The predominant type of item with this planner number assigned.

blank Manufactured or other items
M Master schedule items
P Purchased items

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

RELEASED ORDERS. Total number of orders released during the period.

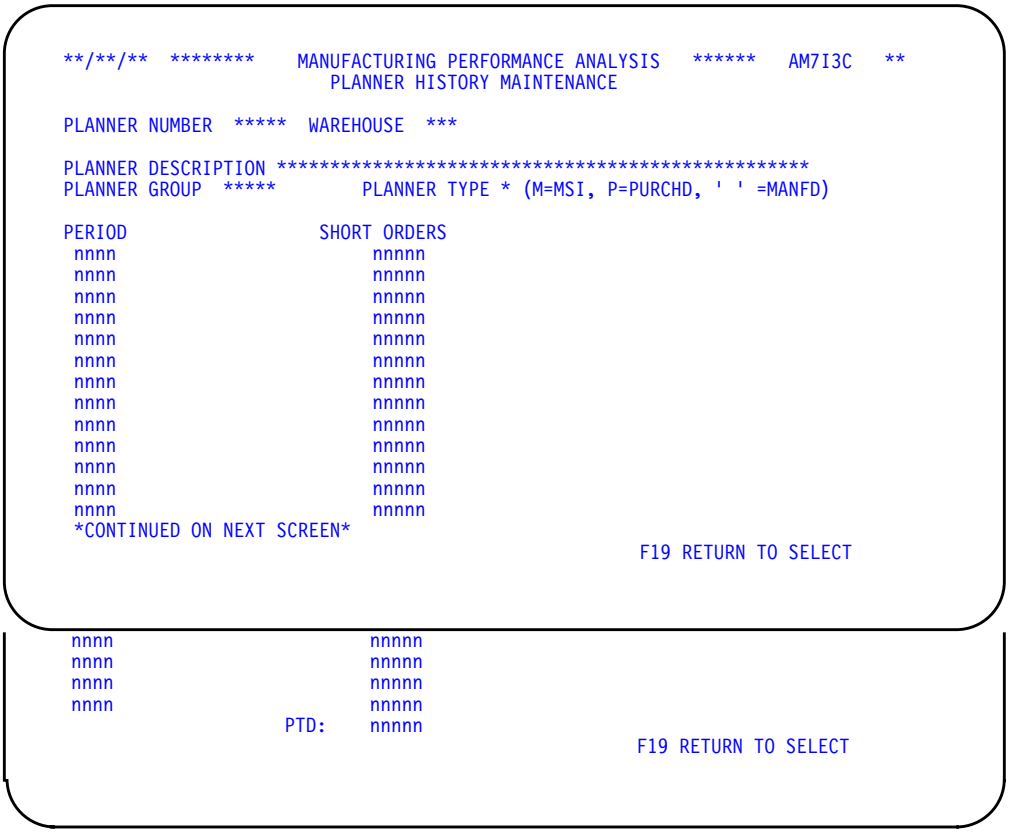
RELEASED ORDERS ON-TIME. Total number of orders released during the period that had sufficient planned lead time.

PTD. Appears only on display AM713B. Total number or orders released period-to-date and total on-time number of orders released period-to-date. These fields can be updated during Close Simulation.

AM7I3C, AM7I3D—Planner History Maintenance (Change/Delete)

These displays allow you to change the performance history data for the selected planner number.

Display AM7I3C appears when you press **Enter** on the Planner History Maintenance (Change) display (AM7I3B). Display AM7I3D appears showing the remaining periods and fields when you press **Enter** on AM7I3C.



Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Planner History Maintenance Selection display (AM7I31) to appear.

Note: Use of this function key does not update maintenance.

Fields

PLANNER NUMBER. Planner number for the planner history being shown.

PLANNER DESCRIPTION. The classification description for this planner number.

PLANNER GROUP. The group to which this planner number belongs.

WAREHOUSE. The warehouse number for the planner history record being changed or deleted.

PLANNER TYPE. The predominant type of item with this planner number assigned.

blank Manufactured or other items
M Master schedule items
P Purchased items

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

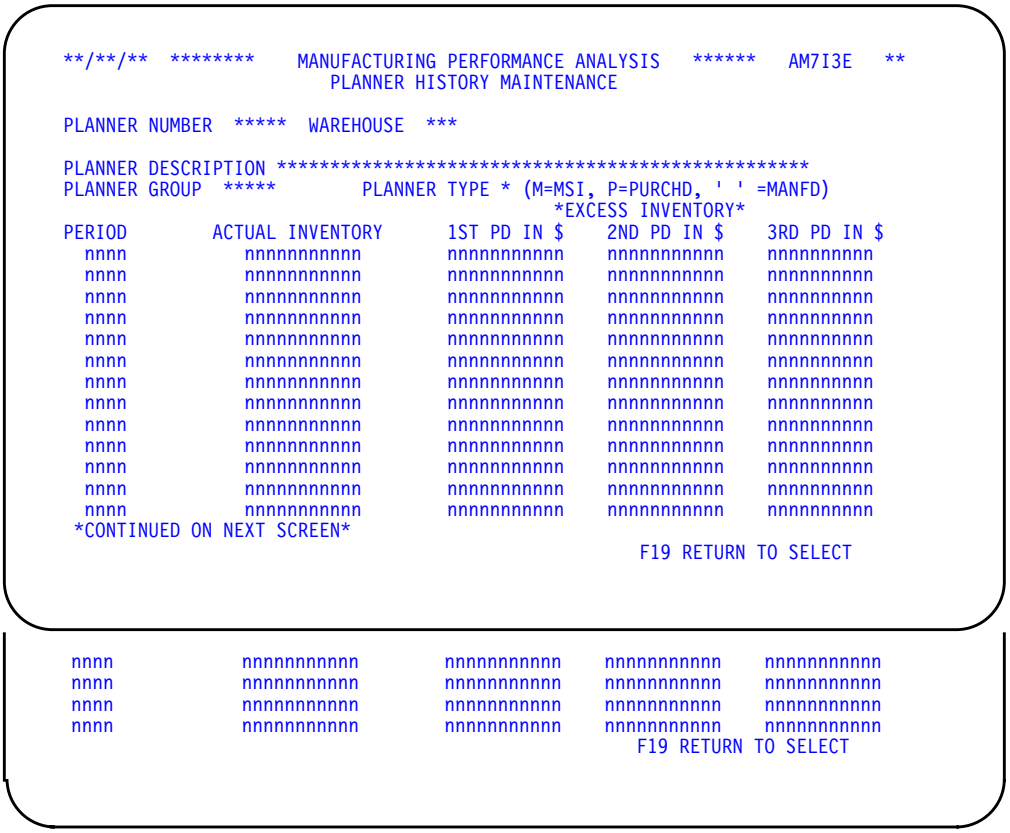
SHORT ORDERS. Total number of open orders for this planner number with shortages at Period Close.

PTD. Appears only on display AM713D. Total number of open orders for this planner number that had shortages during Close Simulation. This field can only be updated during Close Simulation.

AM7I3E—Planner History Maintenance (Change/Delete)

This display allows you to change the performance history data for the selected planner number.

Display AM7I3E appears when you press **Enter** on the Planner History Maintenance (Change) display (AM7I3D). Display AM7I3F appears showing the remaining periods and fields when you press **Enter** on AM7I3E.



Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Planner History Maintenance Selection display (AM7I31) to appear.

Note: Use of this function key does not update maintenance.

Fields

PLANNER NUMBER. Planner number for the planner history being shown.

WAREHOUSE. The warehouse number for the planner history record being changed or deleted.

PLANNER DESCRIPTION. The classification description for this planner number.

PLANNER GROUP. The group to which this planner number belongs.

PLANNER TYPE. The predominant type of item with this planner number assigned.

blank Manufactured or other items
M Master schedule items
P Purchased items

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

ACTUAL INVENTORY. The total inventory value, excluding Work In Process Inventory, for all the items with this planner number.

EXCESS INVENTORY. The inventory cost value of inventory in excess of projected usage for each excess period.

1ST PD IN $. Excess inventory value based on excess period 1.
2ND PD IN $. Excess inventory value based on excess period 2.
3RD PD IN $. Excess inventory value based on excess period 3.

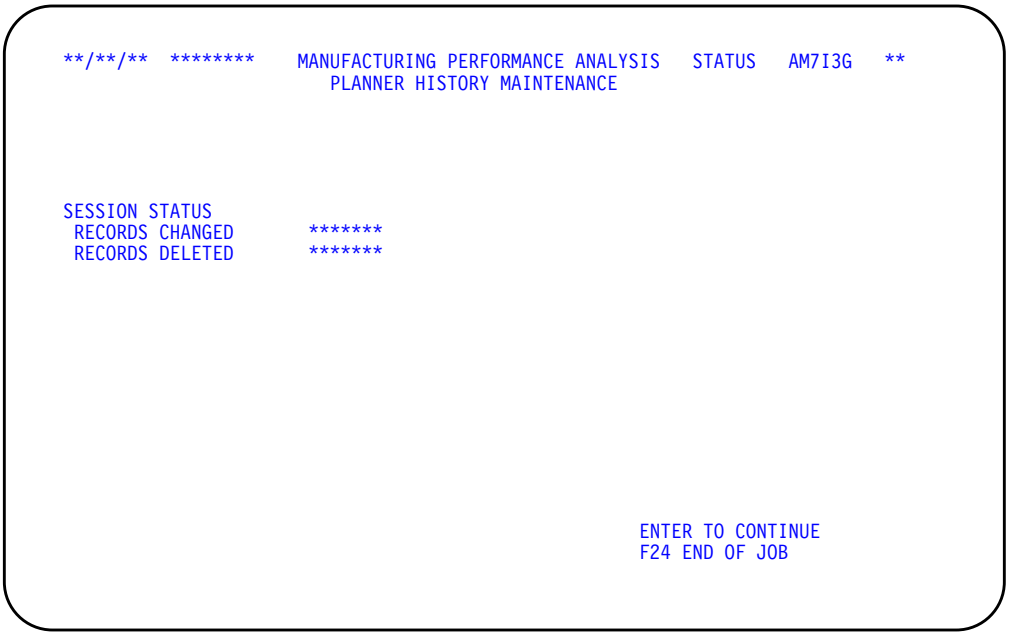
PTD. Appears only on display AM713F. The inventory cost value of inventory is excess of projected usage found during Close Simulation. These fields can only be updated during Close Simulation.

Note: Periods lengths for periods 1, 2, 3 are defined in the Measurement Master file for MPM 15.

AM7I3G—Planner History Maintenance (Status)

This display shows the status of the Planner History file maintenance session and is used to end the job.

This display appears when you press **F24** on display AM7I31.



Function keys

F24 END OF JOB ends the session and the File Maintenance menu (AM7M30) appears again.

Fields

RECORDS CHANGED. The number of records changed during this session.

RECORDS DELETED. The number of records deleted during this session.

Option 4: Work Center Performance

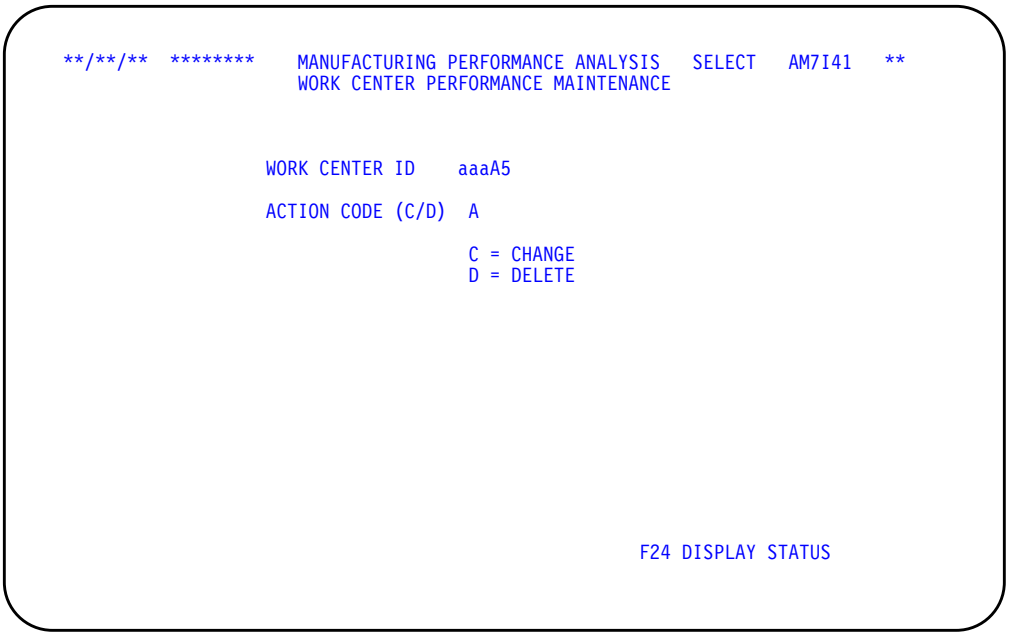
Notes:

1. If EPDM is activated, Option 4 is not available.
2. Please refer to “File Maintenance” on page 2-17.

AM7I41—Work Center Performance Maintenance (Selection)

This display allows you to maintain the history record for the selected work center.

This display appears when you select option 4 on the File Maintenance menu (AM7M30).



Function keys

F24 DISPLAY STATUS causes the File Maintenance Update Status display (AM7I44) to appear.

Fields

WORK CENTER ID. Enter the work center ID for the Work Center record you want to maintain.

ACTION CODE (C/D). Enter one of the following:

C Change a record
D Delete a record

AM7I42, AM7I43—Work Center Performance Maintenance (Change/ Delete)

These displays allow you to add to or change the performance history fields for the selected work center.

Display AM7I42 appears when you press **Enter** on the Work Center Performance Maintenance (Select) display (AM7I41). Display AM7I43 appears showing the remaining periods and fields when you press **Enter** on AM7I42.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   ******   AM7I42   **
                      WORK CENTER PERFORMANCE MAINTENANCE

    WORK CENTER  *****                 WORK CENTER GROUP ID  aA3
 WORK CENTER DESCRIPTION  ****************************************
 WORK CENTER LOCATION  *****     DEPARTMENT NUMBER  ****     FOREMAN  ***

PERIOD     (HOURS)  PLAN QUEUE    ACTUAL QUEUE    PLAN OUTPUT    ACTUAL OUTPUT
  1                  nnnnn          nnnnn          nnnnn            nnnnn
  2                  nnnnn          nnnnn          nnnnn            nnnnn
  3                  nnnnn          nnnnn          nnnnn            nnnnn
  4                  nnnnn          nnnnn          nnnnn            nnnnn
  5                  nnnnn          nnnnn          nnnnn            nnnnn
  6                  nnnnn          nnnnn          nnnnn            nnnnn
  7                  nnnnn          nnnnn          nnnnn            nnnnn
  8                  nnnnn          nnnnn          nnnnn            nnnnn
  9                  nnnnn          nnnnn          nnnnn            nnnnn
 10                  nnnnn          nnnnn          nnnnn            nnnnn
 11                  nnnnn          nnnnn          nnnnn            nnnnn
 12                  nnnnn          nnnnn          nnnnn            nnnnn
 13                  nnnnn          nnnnn          nnnnn            nnnnn

 *CONTINUED ON NEXT SCREEN*
DELETE PENDING - PRESS ENTER                          F19 RETURN TO SELECT
```

```
 24                  nnnnn          nnnnn          nnnnn            nnnnn
 25                  nnnnn          nnnnn          nnnnn            nnnnn
 26                  nnnnn          nnnnn          nnnnn            nnnnn


                                                    F19 RETURN TO SELECT
```

Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Work Center Performance Maintenance Selection display (AM7I41) to appear.

Note: Use of this function key does not update maintenance.

Fields

WORK CENTER. The work center ID of the record being maintained.

WORK CENTER GROUP ID. Enter the group code identification to which this work center belongs.

WORK CENTER DESCRIPTION. The work center's description from the Production Facility file.

WORK CENTER LOCATION. The work center location from the Production Facility Master file.

DEPARTMENT NUMBER. The department number from the Production Facility file.

FOREMAN. The foreman responsible for this work center from the Production Facility file.

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

Note: An additional level of security is required to maintain the following performance history data.

(HOURS) PLAN QUEUE. Standard hours of Planned Queue for each period from the Production Facility file.

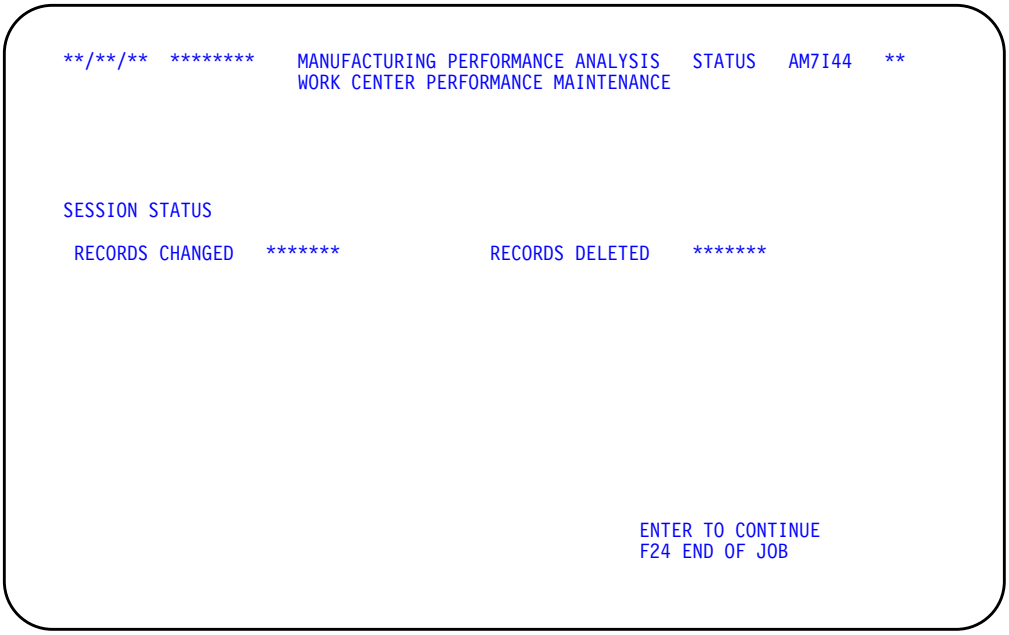
ACTUAL QUEUE. Total queue or waiting work at this work center in standard hours.

PLAN OUTPUT. Standard hours of planned output from the Production Facility file for each period.

ACTUAL OUTPUT. Total earned standard hours (standard output) produced at this work center for each period.

AM7I44—Work Center Performance Maintenance (Status)

This display shows the status of the Work Center Performance Maintenance session and is used to end the job. This display appears when you press F24 on display AM7I41.



Function keys

F24 END OF JOB ends the session and the File Maintenance menu (AM7M30) appears again.

Fields

RECORDS CHANGED. The number of records changed during this session.

RECORDS DELETED. The number of records deleted during this session.

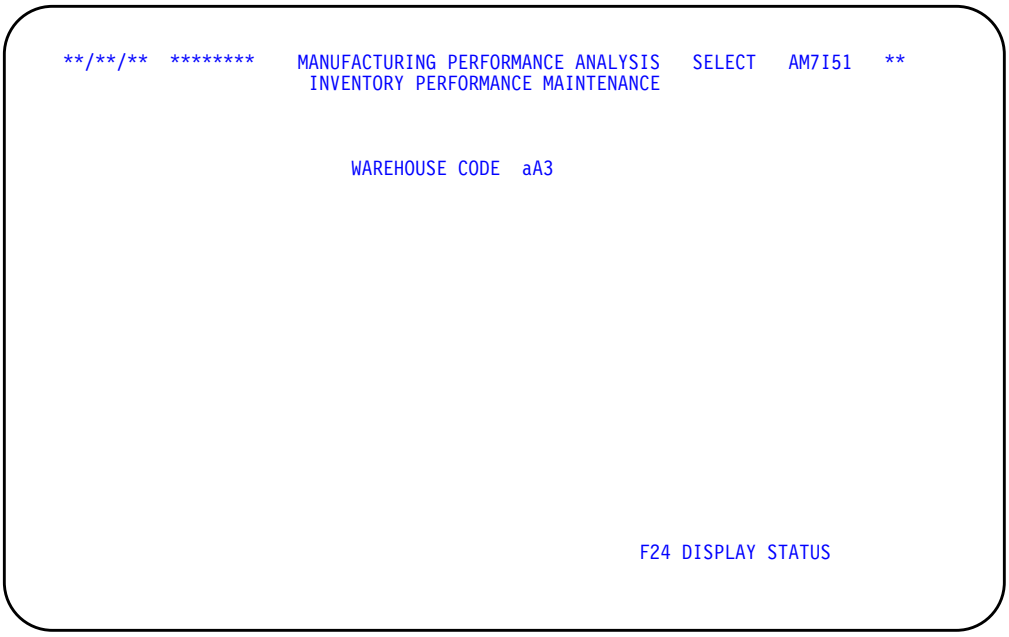
Option 5: Inventory Performance

AM7I51—Inventory Performance Maintenance (Select)

This display allows you to select the Inventory Performance record you want to maintain.

This display appears when you select option 5 on the File Maintenance menu.

Note: An additional level of security is required to maintain inventory performance history data.



Function keys

F24 DISPLAY STATUS causes the Inventory Performance Maintenance display (AM7I5I) to appear.

Fields

WAREHOUSE CODE. Enter the warehouse number for the Inventory Performance record you want to maintain.

AM7I52—Inventory Performance Maintenance (Change)

This display allows you to add to or change the actual inventory performance history for the selected warehouse.

Display AM7I52 appears when you press **Enter** on the Inventory Performance Maintenance (Select) display (AM7I51).

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   ******   AM7I52   **
                       INVENTORY PERFORMANCE MAINTENANCE
WAREHOUSE ***
                             * ACTUAL INVENTORY IN $ *
 PERIOD   FIN GOODS  MANUFACTURED     WIP       PURCHASED    RAW MATERIAL
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                           OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                           OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                           OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                           OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                           OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                           OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                           OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                           OTHER INVENTORY  nnnnnnnnnnn-
                                                           USE ROLL UP/DOWN
                                                           F03 FOLD
                                                           F19 RETURN TO SCREEN
```

Function keys

USE ROLL UP/DOWN causes the history for later or earlier periods to appear.

F03 FOLD causes additional data for each period to appear.

F19 RETURN TO SELECT causes any entry to be ignored and the Inventory Performance Maintenance Selection display (AM7I51) to appear.

Note: Use of this function key does not update maintenance.

Fields

WAREHOUSE CODE. The warehouse for this Inventory Performance record.

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

FIN GOODS. The actual value of finished goods inventory in inventory cost dollars for each period.

MANUFACTURED. The actual value of manufactured parts inventory in inventory cost dollars for each period.

WIP. The actual value of WIP inventory in inventory cost dollars for each period.

PURCHASED. The actual value of purchased inventory in inventory cost dollars for each period.

RAW MATATERIAL. The actual value of raw material inventory in inventory cost dollars for each period.

OTHER INVENTORY. The actual value of all other inventory in inventory cost dollars for each period.

PTD. Appears only when you use the **ROLL UP** key. The total number of orders for the items that were audited or accurate for the current period as of the last Close Simulation.

AM7I54—Inventory Performance Maintenance (Change)

This display allows you to add to or change the inventory performance history for the selected warehouse.

Display AM7I54 appears when you press **Enter** on the Inventory Performance Maintenance display (AM7I52).

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   ******   AM7I54   **
                       INVENTORY PERFORMANCE MAINTENANCE
WAREHOUSE ***
                              * PLANNED INVENTORY IN $ *
 PERIOD   FIN GOODS  MANUFACTURED     WIP       PURCHASED    RAW MATERIAL
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                          OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                          OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                          OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                          OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                          OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                          OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                          OTHER INVENTORY  nnnnnnnnnnn-
  nnnn  nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn- nnnnnnnnnnn-
                                          OTHER INVENTORY  nnnnnnnnnnn-
                                                          USE ROLL UP/DOWN
                                                          F03 FOLD
                                                          F19 RETURN TO SCREEN
```

Function keys

USE ROLL UP/DOWN causes the history for later or earlier periods to appear.

F03 FOLD causes additional data for each period to appear.

F19 RETURN TO SELECT causes any entry to be ignored and the Inventory Performance Maintenance Selection display (AM7I51) to appear.

Note: Use of this function key does not update maintenance.

Fields

WAREHOUSE CODE. The warehouse for this Inventory Performance record.

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

FIN. GOODS. The planned finished goods inventory in inventory cost dollars for each period.

MANUFACTURED. The planned manufactured parts inventory in inventory cost dollars for each period.

WIP. The planned WIP inventory in inventory cost dollars for each period.

PURCHASED. The planned purchased inventory in inventory cost dollars for each period.

RAW MAT.. The planned raw material inventory in inventory cost dollars for each period.

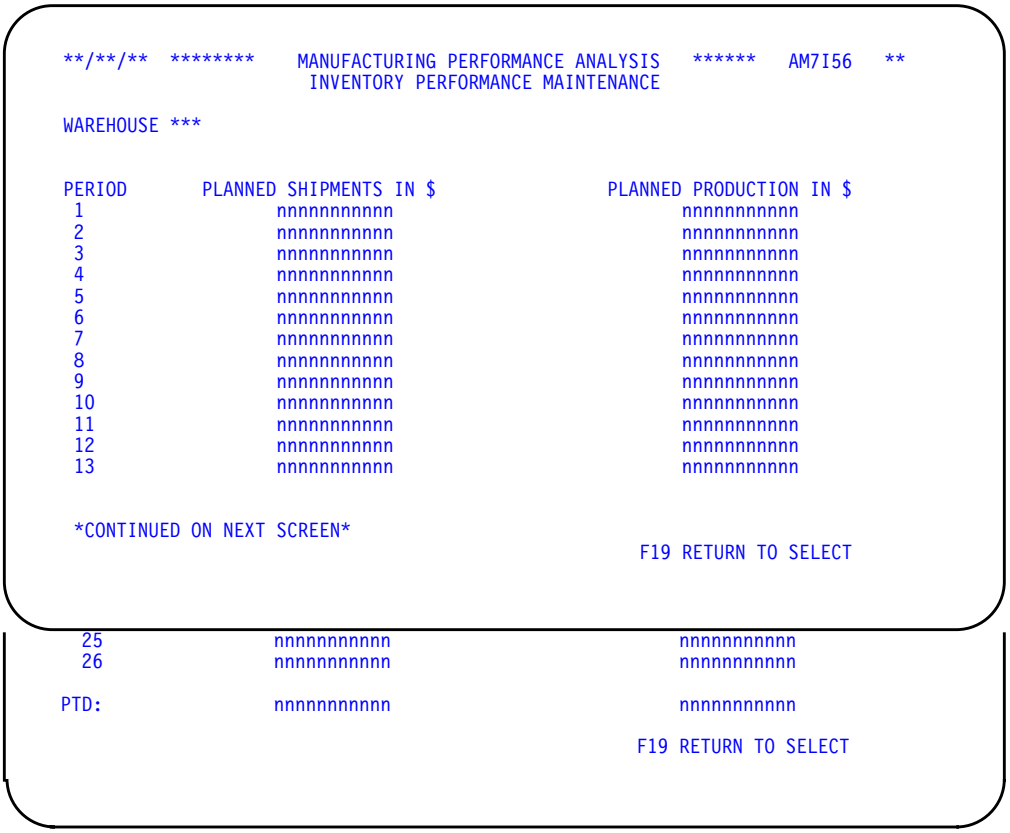
OTHER INV.. The planned inventory of all other items in inventory cost dollars for each period.

NEW FORECAST. Appears only when you use the **ROLL UP** key. The latest periods new forecast entered during Close Simulation. This field can only be updated by Close Simulation.

AM7I56, AM7I57—Inventory Performance Maintenance (Change)

These displays allow you to add to or change the inventory performance history for the selected warehouse.

Display AM7I56 appears when you press **Enter** on the Inventory Performance Maintenance display (AM7I54). Display AM7I57 appears showing the remaining periods and fields when you press **Enter** on AM7I56.



```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   ******   AM7I56   **
                        INVENTORY PERFORMANCE MAINTENANCE

WAREHOUSE ***


PERIOD       PLANNED SHIPMENTS IN $              PLANNED PRODUCTION IN $
 1                  nnnnnnnnnnn                        nnnnnnnnnnn
 2                  nnnnnnnnnnn                        nnnnnnnnnnn
 3                  nnnnnnnnnnn                        nnnnnnnnnnn
 4                  nnnnnnnnnnn                        nnnnnnnnnnn
 5                  nnnnnnnnnnn                        nnnnnnnnnnn
 6                  nnnnnnnnnnn                        nnnnnnnnnnn
 7                  nnnnnnnnnnn                        nnnnnnnnnnn
 8                  nnnnnnnnnnn                        nnnnnnnnnnn
 9                  nnnnnnnnnnn                        nnnnnnnnnnn
 10                 nnnnnnnnnnn                        nnnnnnnnnnn
 11                 nnnnnnnnnnn                        nnnnnnnnnnn
 12                 nnnnnnnnnnn                        nnnnnnnnnnn
 13                 nnnnnnnnnnn                        nnnnnnnnnnn


 *CONTINUED ON NEXT SCREEN*
                                                   F19 RETURN TO SELECT
```

```
  25                nnnnnnnnnnn                        nnnnnnnnnnn
  26                nnnnnnnnnnn                        nnnnnnnnnnn

PTD:                nnnnnnnnnnn                        nnnnnnnnnnn

                                                   F19 RETURN TO SELECT
```

Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Inventory Performance Maintenance Selection display (AM7I51) to appear.

Note: Use of this function key does not update maintenance.

Fields

WAREHOUSE CODE. The warehouse for this Inventory Performance record.

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

PLANNED SHIPMENTS IN $. The planned sales dollar value of all customer order shipments for each period.

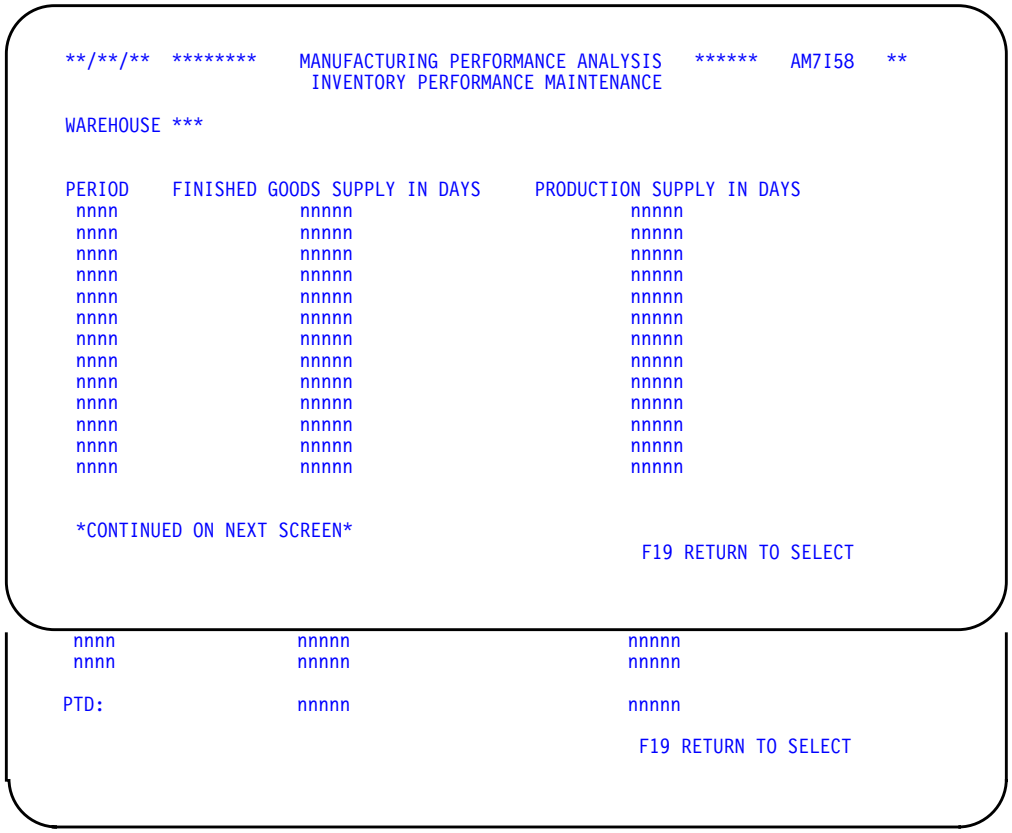
PLAN PRODUCTION IN $. The planned production schedule in inventory cost dollars for each period.

PTD. Appears only on display AM7157. The planned value for shipments and production for the current period as of the last Close Simulation.

AM7I58, AM7I59—Inventory Performance Maintenance (Change)

These displays allow you to add to or change the inventory performance history for the selected warehouse.

Display AM7I58 appears when you press **Enter** on the Inventory Performance Maintenance display (AM7I57). Display AM7I59 appears showing the remaining periods and fields when you press **Enter** on AM7I58.



Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Inventory Performance Maintenance Selection display (AM7I51) to appear.

Note: Use of this function key does not update maintenance.

Fields

WAREHOUSE CODE. The warehouse for this Inventory Performance record.

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

FINISHED GOODS SUPPLY IN DAYS. The finished goods inventory expressed in days of supply to support planned shipments.

PRODUCTION SUPPLY IN DAYS. The production inventory expressed in days of supply to support the Master Production Schedule.

PTD. Appears only on display AM7159. The days supply for finished goods and production inventory for the current period as of the last Close Simulation.

AM7I5A, AM7I5B—Inventory Performance Maintenance (Change)

These displays allow you to add to or change the inventory performance history for the selected warehouse.

Display AM7I5A appears when you press **Enter** on the Inventory Performance Maintenance display (AM7I59). Display AM7I5B appears showing the remaining periods and fields when you press **Enter** on AM7I5A.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   ******   AM7I5A   **
                        INVENTORY PERFORMANCE MAINTENANCE

WAREHOUSE ***


PERIOD     NUMBER OF BILLS AUDITED        NUMBER OF BILLS ACCURATE
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn


  *CONTINUED ON NEXT SCREEN*
                                                  F19 RETURN TO SELECT
```

```
 nnnn               nnnnn                          nnnnn
 nnnn               nnnnn                          nnnnn

PTD:                nnnnn                          nnnnn

                                                  F19 RETURN TO SELECT
```

Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Inventory Performance Maintenance Selection display (AM7I51) to appear.

Note: Use of this function key does not update maintenance.

Fields

WAREHOUSE CODE. The warehouse for this Inventory Performance record.

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

NUMBER OF BILLS AUDITED. The number of bills of material audited during each period.

NUMBER OF BILLS ACCURATE. The number of bills of material that were audited and found to be accurate during each period.

PTD. Appears only on display AM715B The total number of orders for the items that were audited or accurate for the current period as of the last close simulation.

AM7I5C, AM7I5D—Inventory Performance Maintenance (Change)

These displays allow you to add to or change the inventory performance history for the selected warehouse.

Display AM7I5C appears when you press **Enter** on the Inventory Performance Maintenance display (AM7I5B). Display AM7I5D appears showing the remaining periods and fields when you press **Enter** on AM715C.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS    ******   AM7I5C   **
                       INVENTORY PERFORMANCE MAINTENANCE

WAREHOUSE ***


PERIOD     SHIPPED GROSS $         SHIPPED MARGIN $         SHIPPED UNITS
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
 nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn


 *CONTINUED ON NEXT SCREEN*
                                                 F19 RETURN TO SELECT
```

```
nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn
nnnn         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn

PTD:         nnnnnnnnnnn             nnnnnnnnnnn              nnnnnnn.nnn

                                                 F19 RETURN TO SELECT
```

Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Inventory Performance Maintenance Selection display (AM7I51) to appear.

Note: Use of this function key does not update maintenance.

Fields

WAREHOUSE CODE. The warehouse for this Inventory Performance record.

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

SHIPPED GROSS $. The sales dollar value of finished goods shipments for each period.

SHIPPED MARGIN $. The profit margin dollar value of finished goods shipments for each period.

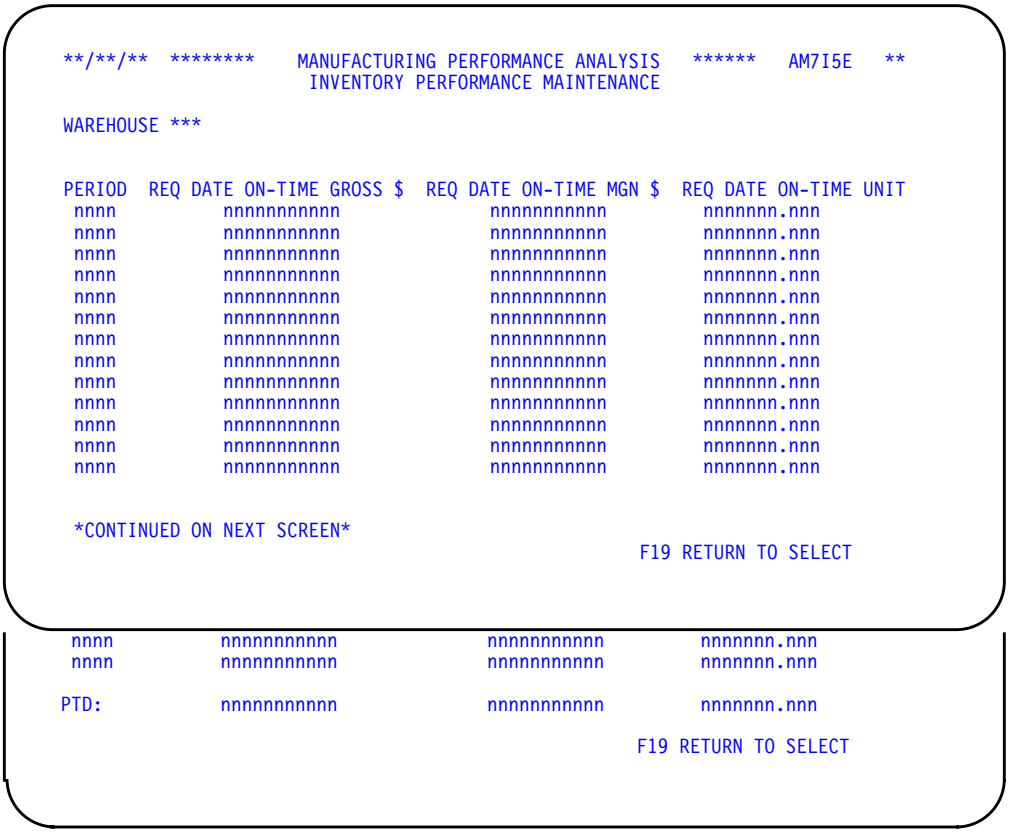
SHIPPED UNITS. The number of units of finished goods shipments for each period.

PTD. Appears only on display AM715D. The shipping activity for the current period as of the last Close Simulation.

AM7I5E, AM7I5F—Inventory Performance Maintenance (Change)

These displays allow you to add to or change the inventory performance history for the selected warehouse.

Display AM7I5E appears when you press **Enter** on the Inventory Performance Maintenance display (AM7I5D). Display AM7I5F appears showing the remaining periods and fields when you press **Enter** on AM7I5E.



Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Inventory Performance Maintenance Selection display (AM7I51) to appear.

Note: Use of this function key does not update maintenance.

Fields

WAREHOUSE CODE. The warehouse for this Inventory Performance record.

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

REQ DATE ON-TIME GROSS $. The sales dollar value of on-time shipments measured against the customer order request date for each period.

REQ DATE ON-TIME MGN $. The profit margin dollar value of on-time shipments measured against the customer order request date for each period.

REQ DATE ON-TIME UNITS. The total on-time shipments in units measured against the customer order request date for each period.

PTD. Appears only on display AM715F. The shipping activity for the current period as of the last Close Simulation.

AM7I5G, AM7I5H—Inventory Performance Maintenance (Change)

These displays allow you to add to or change the inventory performance history for the selected warehouse.

Display AM7I5G appears when you press **Enter** on the Inventory Performance Maintenance display (AM7I5F). Display AM7I5H appears showing the remaining periods and fields when you press **Enter** on AM7I5G.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   ******   AM7I5G   **
                       INVENTORY PERFORMANCE MAINTENANCE

WAREHOUSE ***


PERIOD  MFG DATE ON-TIME GROSS $  MFG DATE ON-TIME MGN $  MFG DATE ON-TIME UNIT
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn


 *CONTINUED ON NEXT SCREEN*
                                                     F19 RETURN TO SELECT
```

```
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn
  nnnn        nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn

PTD:          nnnnnnnnnnn              nnnnnnnnnnn              nnnnnnn.nnn

                                                     F19 RETURN TO SELECT
```

Function keys

F19 RETURN TO SELECT causes any entry to be ignored and the Inventory Performance Maintenance Selection display (AM7I51) to appear.

Note: Use of this function key does not update maintenance.

Fields

WAREHOUSE CODE. The warehouse for this Inventory Performance record.

PERIOD. History period and forecast period dates. There are 26 periods. The first period is the oldest period and the last period is the most recent period or the most distant forecast period.

MFG DATE ON-TIME GROSS $. The sales dollar value of on-time shipments measured against the customer order manufactured schedule date for each period.

MFG DATE ON-TIME MGN $. The profit margin dollar value of on-time shipments measured against the customer order manufactured schedule date for each period.

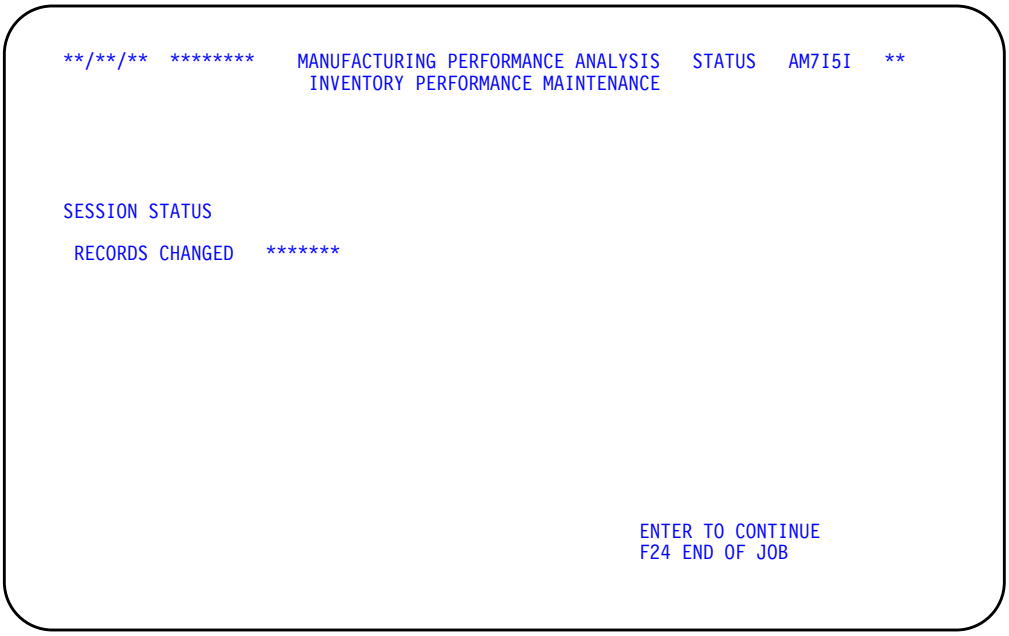
MFG DATE ON-TIME UNIT. The total on-time shipments in units measured against the customer order manufactured schedule date for each period.

PTD. Appears only on display AM715H. The shipping activity for the current period as of the last Close Simulation.

AM7I5I—Inventory Performance Maintenance (Status)

This display shows the status of the Inventory Performance Maintenance file session.

This display appears when you use **F24** on the Inventory Performance Maintenance display (AM7I51).



Function keys

F24 END OF JOB causes the session to end and the File Maintenance menu to appear again.

Fields

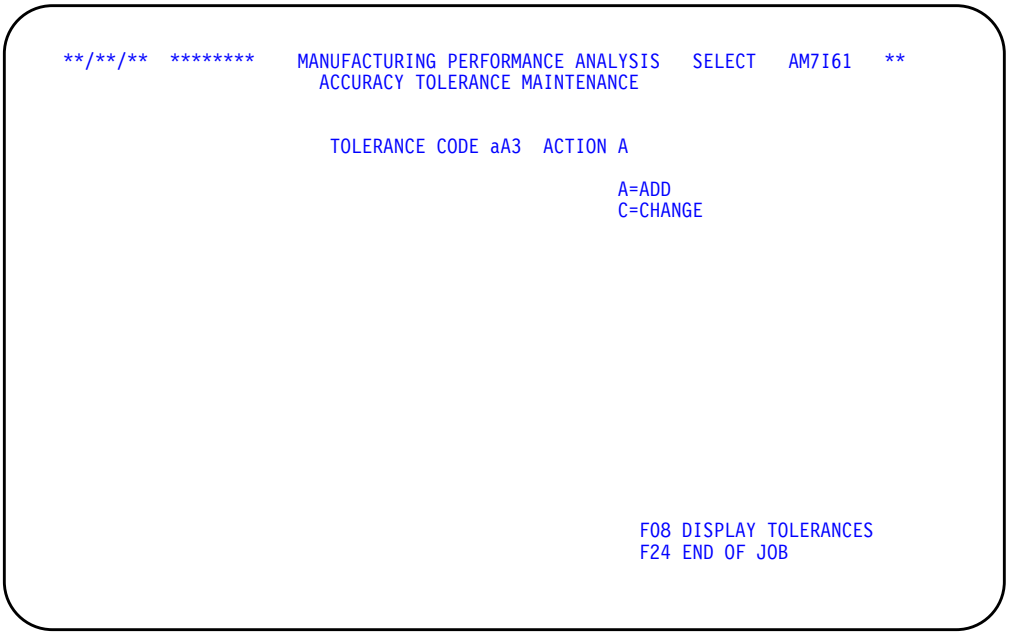
RECORDS CHANGED. The total number of warehouse records changed during this session.

Option 6: Accuracy Tolerance

AM7I61—Accuracy Tolerance Maintenance (Select)

This display allows you to select an accuracy tolerance code value to maintain.

This display appears when you select option 6 on the File Maintenance menu (AM7M30).



Function keys

F08 DISPLAY TOLERANCES causes existing table records to appear.

F24 END OF JOB causes the File Maintenance menu to appear.

Fields

TOLERANCE CODE. Type in the code for the accuracy tolerance code to be assigned to items in the Item Measurement file. This field is required and is a three-digit alphanumeric field.

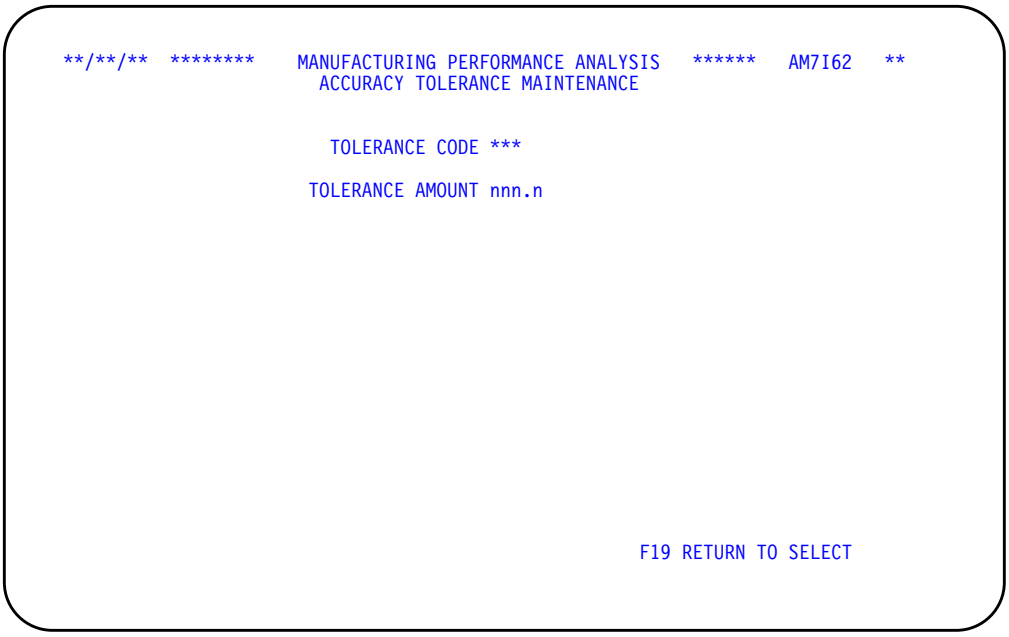
ACTION. Type in the value for the desired action. This is a required field.

A Add a tolerance code
C Change a tolerance code

AM7I62—Accuracy Tolerance Maintenance (Add/Change)

This display allows you to maintain the Accuracy Tolerance value for this tolerance code.

This display appears when you press **Enter** on the Accuracy Tolerance Maintenance (Select) display (AM7I61).



Function keys

F08 DISPLAY TOLERANCE TABLE causes existing tolerance records to appear.

F19 RETURN TO SELECT causes any entry to be ignored and the Accuracy Tolerance Maintenance (Select) display (AM7I61) to appear.

Fields

TOLERANCE CODE. The tolerance code for the value you are maintaining.

TOLERANCE AMOUNT. Type in the percentage amount representing the deviation allowed. This value represents a percent with one decimal place. For example, 10 represents 10.0%; that is, the actual value can be plus or minus 10% of the expected value and still be considered accurate.

AM7I63—Accuracy Tolerance Maintenance (Display)

This display allows you to review existing tolerance records.

This display appears when you press **F08** on the Accuracy Tolerance Maintenance (Select) display (AM7I61).

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   ******   AM7I63   **
                        ACCURACY TOLERANCE MAINTENANCE

          TOLERANCE          TOLERANCE          TOLERANCE          TOLERANCE
        CODE   AMOUNT      CODE   AMOUNT      CODE   AMOUNT      CODE   AMOUNT

          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****
          **    *****        **    *****        **    *****        **    *****  +

                                                    ENTER TO RETURN
                                                    USE ROLL UP/DOWN
```

Function keys

USE ROLL UP/DOWN. Hold down the shift key and press **ROLL UP** or **ROLL DOWN** to scroll up and down through the list of tolerance codes.

Fields

TOLERANCE CODE. The tolerance code values.

TOLERANCE AMOUNT. The percentage amount representing the deviation allowed. This value represents a percent with one decimal place. For example, 10 represents 10.0%; that is, the actual value can be plus or minus 10% of the expected value and still be considered accurate.

Option 7: Measurement Master

AM7I71—Measurement Master Maintenance (Select)

Use this display to select a measurement master record to maintain.

This display appears when you select option 7 on the File Maintenance menu.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   SELECT   AM7I71   **
                       MEASUREMENT MASTER MAINTENANCE


   ENTER 'S' TO SELECT
                  .. 001 CUSTOMER ORDER BOOKING PERFORMANCE
                  .. 002 CUSTOMER ORDER BACKLOG ANALYSIS
                  .. 003 MASTER SCHEDULE PERFORMANCE
                  .. 004 SHIPPING PERFORMANCE
                  .. 005 INVENTORY PERFORMANCE PROFILE
                  .. 006 INVENTORY RECORD ACCURACY
                  .. 007 BILL OF MATERIAL RECORD ACCURACY
                  .. 008 PURCHASE COMMITTMENT PERFORMANCE
                  .. 009 ORDER RESCHEDULE RELIABILITY
                  .. 010 ORDER RELEASE RELIABILITY
                  .. 011 MATERIAL AVAILABILITY PERFORMANCE
                  .. 012 QUEUE PERFORMANCE
                  .. 013 OUTPUT PERFORMANCE
                  .. 014 INVENTORY TURNOVER TREND
                  .. 015 EXCESS INVENTORY ANALYSIS

                                                    F24 CANCEL JOB
```

Function keys

F24 CANCEL JOB causes the File Maintenance menu to appear.

AM7I72—Measurement Master Maintenance (Add/Change)

Use this display to add or change the default values in the measurements data fields.

This display appears when you select measurements for maintenance from the Measurement Master Maintenance (Select) display (AM7I71). The fields displayed are dependant upon the measurement record you selected. If you have any concerns about how these fields should be changed, refer to “Measurement Master File Maintenance” on page 2-19. In that section, you can read about the measurements and their defaults.

The following is an example:

```
 **/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   CHANGE   AM7I72   *
                         MEASUREMENT MASTER MAINTENANCE

MPM  001           CUSTOMER ORDER BOOKING PERFORMANCE
FREQUENCY  4                              TARGET DESCRIPTION:
DATE OF LAST CLOSE  **/**/**              ******************************
DATE OF LAST SIMULATION  **/**/**         TARGET VALUE - LOW        20.0-
DOLLAR BASIS CODE  4                      TARGET VALUE - HIGH       20.0
UNIT BASIS CODE    1
HISTORY PERIODS   23
FORECAST PERIODS   3              PRINT REPORTS AFTER EACH CLOSE (Y/N) Y
TOTAL AVAILABLE   26              PRINT DETAIL AUDIT LISTING (Y/N)     Y

DEFAULT DATE FOR PAST DUE PERFORMANCE (R REQUEST,M MANUFACTURING SCHEDULE)  M
INCLUDE SCHEDULED RECEIPTS (Y/N)  N
NUMBER OF PERIODS TO DETERMINE AVAILABILITY    1
INCLUDE CUSTOMER REQUIREMENTS IN AVAILABILITY CALCULATIONS (Y/N)  Y
COST CALCULATION METHOD (1 STANDARD, 2 AVERAGE, 3 LAST)       1
EXCESS PERIOD LENGTH: PERIOD 1   6  , PERIOD 2  12  , PERIOD 3  18
USE REQUIREMENTS/PLANNED ORDERS IN MRP? (Y/N)  Y


**FREQUENCY WILL DEFAULT TO FREQUENCY ENTERED FOR MEASUREMENT 09**          *

                                                  F08 CHANGE DESCRIPTION
```

Function keys

F08 CHANGE DESCRIPTION lets you see or change a description of the measurement and causes display AM7I73 to appear.

Fields

MPM (Manufacturing performance measurement). The number and name of the measurement to be maintained.

FREQUENCY. Type in this code to indicate how often this measurement is updated through period close. The codes are:

1 Daily
2 Weekly
3 Biweekly
4 Monthly
5 Quarterly
6 Quadweekly

If you want to change your measurement frequency after MPA has been collecting period data, be sure to change it immediately after period close.

DATE OF LAST CLOSE. The last date this measurement was closed.

DATE OF LAST SIMULATION. The last date that this measurement was updated using close simulation.

DOLLAR BASIS CODE. Type in the dollar unit of measure to be used on the measurement inquiry display and printed reports. The codes are:

1 One dollar
2 Ten dollars
3 Hundred dollars
4 Thousand dollars
5 Ten thousand dollars
6 Hundred thousand dollars
7 Million dollars
8 Ten million dollars
9 Hundred million dollars

UNIT BASIS CODE. Type in this code to specify the desired unit of measure for amounts shown for unit of measure on the measurement's inquiry or reports. The unit basis codes are:

C Thousandths
B Hundredths
A Tenths
1 Ones
2 Tens
3 Hundreds
4 Thousands
5 Ten thousands
6 Hundred thousands
7 Millions

HISTORY PERIODS. Type in the number of history periods of performance data maintained for this measurement.

FORECAST PERIODS. Type in the number of forecast periods for this measurement.

TOTAL AVAILABLE. The total number of periods, history and forecast, available for this measurement. The selected number of history and forecast periods must add up to this number.

TARGET DESCRIPTION. The description of the performance on the measurement's inquiry display and reports. Set the target values in reference to this description.

TARGET VALUE - LOW. Type in a numeric low performance target for this measurement.

TARGET VALUE - HIGH. Type in a numeric high performance target for this measurement.

PRINT REPORTS AFTER EACH CLOSE (Y/N). Type in **Y** to print performance reports after period close.

PRINT DETAIL AUDIT LISTING (Y/N). Type in **Y** to print the audit report after the measurement is closed. An audit report lists the detail data used to calculate and update the performance data. It can be used to validate the performance measurement as well as identify items, orders, data base files, or procedures that require corrective action.

DEFAULT DATE FOR PAST DUE PERFORMANCE (R REQUEST, M MANUFACTURING SCHEDULE). Sets the default for the performance inquiry displays and report selection display for MPM 2 and 4. Indicates whether the customer order request date or the manufacture schedule date is the customer order due date used to evaluate past-due performance.

COST CALCULATION METHOD (1 STANDARD, 2 AVERAGE, 3 LAST). Defaults to the inventory valuation technique Inventory Management uses to calculate inventory values or inventory costs. You can change to one of the other methods listed. This field appears for MPM 2, 3, 4, 5, 6, 8, 14, and 15.

INCLUDE SCHEDULED RECEIPTS (Y/N). Type in **Y** to have the shortage analysis consider scheduled receipts. This field appears only for MPM 11.

NUMBER OF PERIODS TO DETERMINE AVAILABILITY. The number of periods into the future that you want to test orders for shortages. This field appears only for MPM 11.

INCLUDE CUSTOMER REQUIREMENTS IN AVAILABILITY CALCULATIONS (Y/N). Type in **Y** to consider customer order requirements when calculating shortages for orders. This field appears only for MPM 11.

EXCESS PERIOD LENGTH (PERIOD 1 **, PERIOD 2 **, PERIOD 3**). Type in the number of frequency periods assigned to each period. For example, if the frequency code is monthly (4) and you set period 1 at 6, EXCESS PERIOD 1 is six months. Inventory in excess of six months usage is considered excess inventory for EXCESS PERIOD 1. Remember that EXCESS PERIOD 2 must be larger than period 1 and likewise EXCESS PERIOD 3 must be larger than EXCESS PERIOD 2. This field appears only for MPM 15.

USE REQUIREMENTS/PLANNED ORDERS IN MRP (Y/N). Type in **Y** to use planned orders and requirements developed by MRP in the measurement period close. This answer to defaults to Y if MRP is installed. This field appears only for MPM 3, 5, 14, and 15, and will not appear if MRP is not installed.

AM7I73—Measurement Master Maintenance (Update)

Use this display to describe the measurement being maintained. This information is shown on report selections and when you use the **HELP MSTM DETAILS** function key on the MPM inquiry displays.

This display appears if you use **F08** on the Measurement Master Maintenance (Add/ Change) display (AM7I72) for any of the 15 measurements.

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   UPDATE   AM7I73   **
                        MEASUREMENT MASTER MAINTENANCE

MEASUREMENT  ***   **************************************************

               MEASUREMENT PURPOSE                     DOLLAR BASIS  UNITS BASIS
aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaA50        CODES         CODES
aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaA50     1          1s  1         1s
                                                       2         10s  2        10s
           MEASUREMENT DESCRIPTION                     3        100s  3       100s
aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaA50     4       1000s  4      1000s
aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaA50     5      10000s  5     10000s
aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaA50     6     100000s  6    100000s
aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaA50     7    1000000s  7   1000000s
aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaA50     8   10000000s  A        .1s
aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaA50     9  100000000s  B       .01s
aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaA50                    C      .001s

                                                          FREQUENCY CODES
                                                       1 DAILY      4 MONTHLY
                                                       2 WEEKLY     5 QUARTERLY
                                                       3 BIWEEKLY   6 QUADWEEKLY

                                                                  ENTER TO RETURN
```

Function keys

None.

Fields

MEASUREMENT. The measurement number and description.

MEASUREMENT PURPOSE. Type in the purpose of the measurement.

LEGENDS. Type in the dollar basis codes and frequency codes.

MEASUREMENT DESCRIPTION. Type in the detailed description of the measurement.

DOLLAR BASIS CODE. Type in the dollar unit of measure to be used on the measurement inquiry display and printed reports. The codes are:

1 One dollar
2 Ten dollars
3 Hundred dollars
4 Thousand dollars
5 Ten thousand dollars
6 Hundred thousand dollars
7 Million dollars
8 Ten million dollars
9 Hundred million dollars

UNIT BASIS CODE. This code specifies the desired unit of measure for amounts other than currency amounts shown on the measurement's inquiry or reports.

C Thousandths
B Hundredths
A Tenths
1 Ones
2 Tens
3 Hundreds
4 Thousands
5 Ten Thousands
6 Hundred Thousands
7 Millions.

FREQUENCY CODES. Type in this code to indicate how often this measurement is updated through period close. The codes are:

1 Daily
2 Weekly
3 Biweekly
4 Monthly
5 Quarterly
6 Quadweekly

Chapter 7. Cycle Counting

The Cycle Count Menu appears when you select Option 6 from the Main Menu.

AM7M40—Cycle Count Menu

This menu allows you to select the cycle counting function you want to perform.

```
AM7M40                Manufacturing Performance Analysis            **********
                              Cycle Count Menu

Type option or command; press Enter.

     1. Count Select
     2. Count Entry
     3. Count Posting
     4. Inventory Adjustment









==> ____________________________________________________________________________

F3=Exit          F4=Prompt    F9=Retrieve    F10=Actions
F11=Job status   F12=Return   F22=Messages
```

Option 1. Use this option to select the items you want to have cycle counted.

Option 2. Use this option to enter actual counts.

Option 3. Use this option to initiate the function that compares the cycle count results with the inventory record balances.

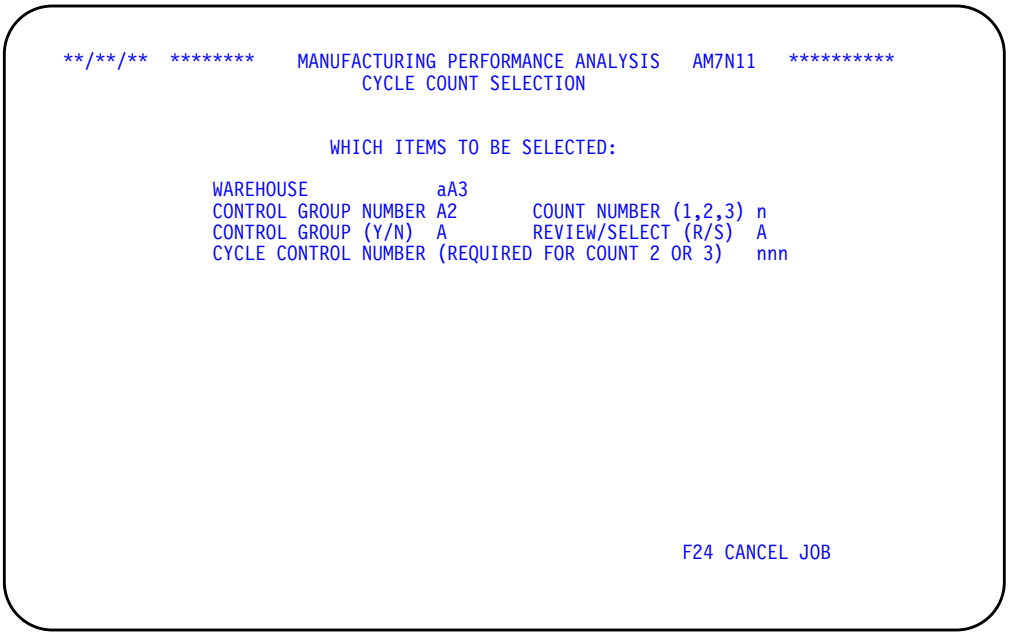
Option 4. Use this option to review the results of the last cycle count and adjust inventory records.

Option 1: Count Select

AM7N11—Cycle Count Selection

This display allows you to select the type of items to be cycle counted. Enter your control group selection and press **Enter**. After pressing **Enter**, the print selection display or the noncontrol group selection display appear. If you have selected noncontrol group items and this is the first count the Non Control Group Selection display (AM7N12) appears. If this is a second or third count, the Print and Entry Sequence Selection display (AM7N14) appears.

This display appears when you select option 1 on the Cycle Count menu.



Function keys

F24 CANCEL JOB cancels the job and causes the Cycle Count menu to appear.

Fields

WAREHOUSE. Enter the warehouse from which the items are to be selected for cycle counting.

CONTROL GROUP NUMBER. Enter the two-digit number for the control group you want to have counted.

CONTROL GROUP (Y/N). Enter **Y** to indicate that you are selecting a control group for counting. Enter a **N** to indicate that you are selecting items for counting that do not belong to a control group. You can select either a control group or noncontrol group items but not both simultaneously.

CYCLE CONTROL NUMBER (REQUIRED FOR COUNT 2 OR 3). Required when you select items for a second or third count. Type in the number the system assigned after the first count. The number can be found on the Cycle Count Selection report or

on the Counted/Uncounted Items report for the first count. This number is used to select items to be counted and to adjust balances.

COUNT NUMBER (1,2,3). Enter **1**, **2**, or **3** to indicate if you are selecting items for their first, second, or third count. When selecting a control group for the first count, all the items in the control group are selected. Noncontrol group items are selected for the first count based on the other criteria selected on the Non Control Group Selections display (AM7N12), and if they have not been counted during the current cycle count period. Second and third count selections are made based on the accuracy of the first count. An inaccurate first count causes the item to be selected for a second or third count.

REVIEW/SELECT (R/S). Enter **R** to indicate that the items selected are printed for review only and are not selected and entered into the batch for counting. Enter **S** to indicate that the items are selected and entered into the batch for counting.

AM7N12—Cycle Count Selection–Non Control Group Selections

This display allows you to select noncontrol group items for cycle counting. Type in your selections and press **Enter** to initiate your cycle counting selections for noncontrol group items and cause the Print and Entry Sequence display (AM7N14) to appear.

This display appears when you select noncontrol group items by entering N for the control group selection on the Cycle Count Selection display (AM7N11).

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7N12   **********
                            CYCLE COUNT SELECTION


                          NON CONTROL GROUP SELECTIONS

              ITEM NUMBER RANGE    aaaaaaaaaaaaA15 TO aaaaaaaaaaaaA15

              STOCK LOCATION RANGE aaaaaA7         TO aaaaaA7

              ITEMS WITH NEGATIVE BALANCE (Y/N)  A

              INVENTORY CYCLE COUNT CODE (Y/N)   A
                  TRANSACTION TOLERANCE PERCENT: nn
                  CYCLE COUNT DUE DATES BEFORE:  nnnnnn









                                                        F02 MULTIPLE ITEMS
                                                        F24 CANCEL JOB
```

Function keys

F02 MULTIPLE ITEMS causes the Multiple Item Selection display (AM7N13) to appear. If you only want to select multiple items or locations, you must select a “dummy” range that you know would not include any of your items or locations, then press **F02**.

F24 CANCEL JOB causes the job to be canceled and the Cycle Count menu to appear.

Fields

ITEM NUMBER RANGE. Enter the range of item numbers you want to have cycle counted. If you enter any item number, you must enter both a from and to item number. If you leave the range blank, all items will be included.

STOCK LOCATION RANGE. Enter the range of stock locations you want to have cycle counted. If you enter any stock location, you must enter both a from and to stock location. If you leave the range blank, all locations will be included.

ITEMS WITH NEGATIVE BALANCE (Y/N). Enter **Y** or **N** to indicate if you want to select all items with negative on hand inventory balances. This field is required.

INVENTORY CYCLE COUNT CODE (Y/N). Enter **Y** or **N** to indicate if you want to select items for cycle counting based on the cycle count codes in Inventory Management. This field is required.

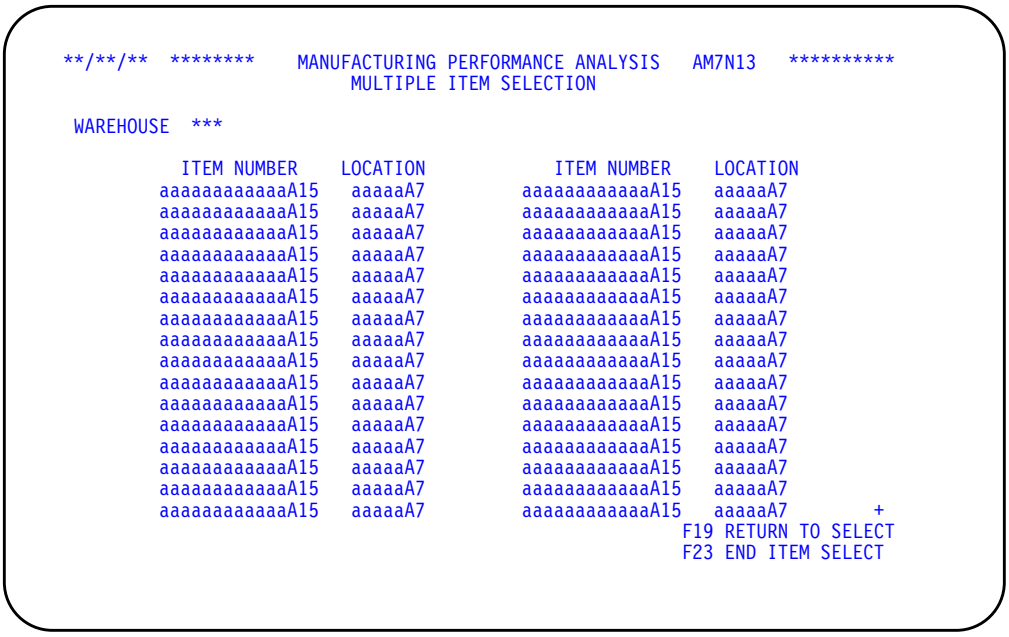
TRANSACTION TOLERANCE PERCENT. Use this field if you are selecting items based on cycle count codes and you are using the count compare code. You can specify that those items with at least the specified number of transactions less this tolerance percent are selected.

CYCLE COUNT DUE DATES BEFORE. Use this field if you are selecting items based on cycle count codes and you are using the count compare code. You can specify that those items with dates before this date are selected.

AM7N13—Multiple Item Selection

This display allows you to enter specific item numbers selected for cycle counting. Using the **Enter** key has no effect on this display.

This display appears when you use **F02** on the Cycle Count Selection display (AM7N12).



Function keys

F19 RETURN TO SELECT causes the Non Control Group Selections display (AM7N12) to appear.

F23 END ITEM SELECT causes the Cycle Count Selection display (AM7N14) to appear.

Fields

WAREHOUSE. The warehouse from which the items are selected for cycle counting.

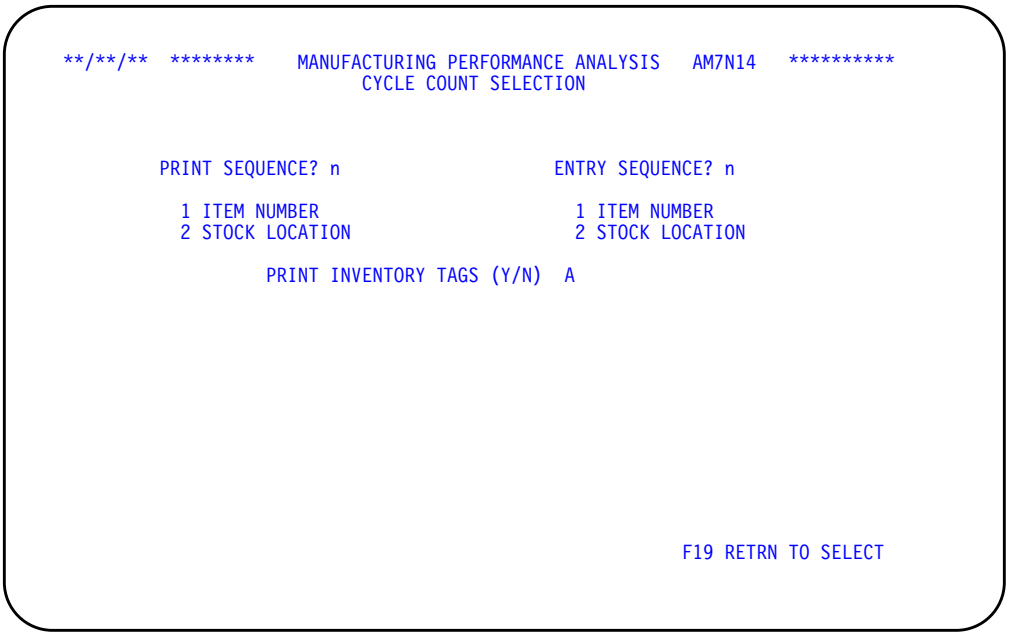
ITEM NUMBER. Enter the item number(s) that are to be cycle counted. For controlled warehouses, if this field is blank and a location is entered, all existing items for the location are selected for count.

LOCATION. Enter the stock location for the items to be cycle counted. For controlled warehouses, if this field is blank and an item number is entered, all existing locations for the item are selected for count.

AM7N14—Cycle Count Selection–Print/Entry Sequence

This display allows you to select the print and entry sequence for the cycle count list or inventory tags, and the count results.

This display appears when you press **Enter** on the Cycle Count Selection displays (AM7N11, AM7N12), or F23 on the Multiple Item Select display (AM7N13).



Function keys

F19 RETRN TO SELECT causes the Multiple Item Selection display (AM7N13) to appear.

Fields

PRINT SEQUENCE?. Enter the number that represents your desired printing sequence for the cycle count list and inventory tags.

1 Print list in item number sequence
2 Print list in stock location sequence

ENTRY SEQUENCE?. Enter the number that represents your desired count entry sequence for the count entry batch.

1 Display items in item number sequence
2 Display items in stock location sequence

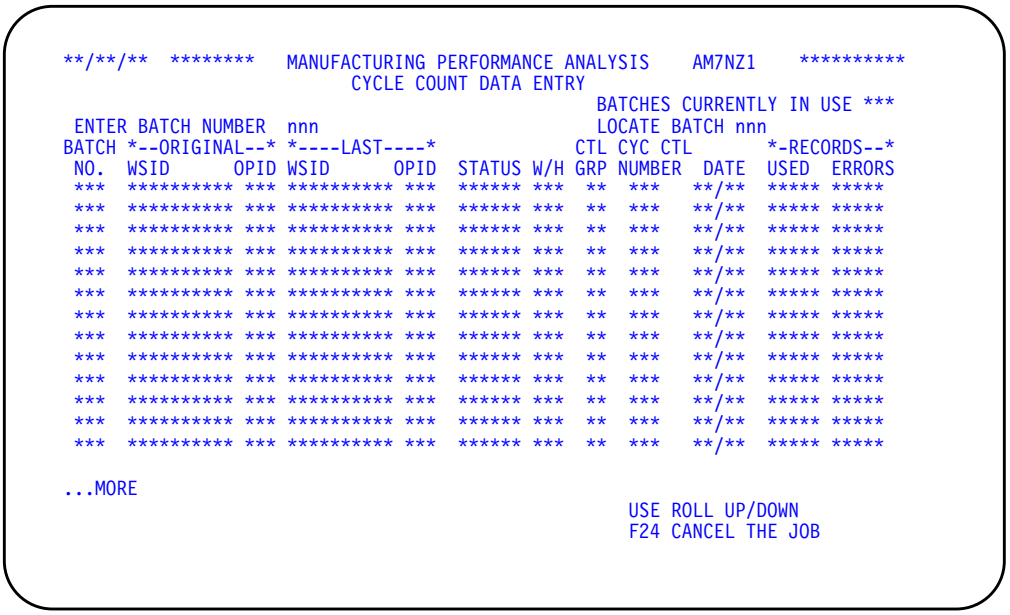
PRINT INVENTORY TAGS (Y/N). Type **Y** or **N** to indicate if you want to print cycle count inventory tags. Y indicates that special forms are required.

Option 2: Count Entry

AM7NZ1—Cycle Count Entry Batch Selection

This display allows you to select a Cycle Count Batch for entry of the actual counts.

This display appears when you select option 2 from the Cycle Count menu.



Function keys

USE ROLL UP/DOWN to view additional items for count entry. Using the **ROLL** key causes the entries to be edited and accepted. Any default dates and initials are loaded when the roll key is used.

F24 CANCEL THE JOB causes the job to be canceled and the Cycle Count menu to appear.

Fields

BATCHES CURRENTLY IN USE. The number of batches currently in use.

ENTER BATCH NUMBER. Type in the number of an existing batch with which you want to work.

LOCATE BATCH. Use this field to search for a specific batch with which you want to work. The batch you select appears at the top of the list of batches on the display.

BATCH NO. (Batch Number). Enter the cycle count batch number from the Cycle Count List or Inventory Tags for the counted items.

ORIG WSID (Original Work Station Identification). The identification of the work station where transactions for the batch were originally entered and the operator who entered them. The operator ID appears only if password security is in effect.

LAST WSID (Last Work Station Identification). The identification of the work station where the batch was last selected and the operator who selected it. The operator ID appears only if password security is in effect.

STATUS. One of the following appears:

ACTIVE indicates either that another work station is using the batch, or that it is incomplete because of some abnormal condition such as loss of power. You can work on an active batch that is incomplete from the work station that started it.

SUSPND (Suspend) Indicates that you selected **F23** from a batch status display to end the work station session, or that the Manufacturing Performance Analysis application has automatically suspended a batch. You can select a suspended batch from any work station.

CLOSED Indicates that you selected **F24** from a batch status display to end the work station session. Generally, a batch should not be closed until after a report is printed and you have verified that the batch is correct and complete. For purposes of data entry, a closed batch is treated the same as a suspended batch.

DELETE Indicates that you selected **F20** to delete the batch.

UPDATE Indicates that you chose the batch for update from cycle count post selection.

FINISH Indicates that the batch has been applied to the master files.

W/H. The warehouse for the counted item. This is a system-supplied field.

CONTROL GROUP. The control group for the batch.

CYCLE CTL NUMBER. System-assigned number used when selecting items to be counted and when adjusting balances.

DATE. The creation date or the date of last activity for the batch.

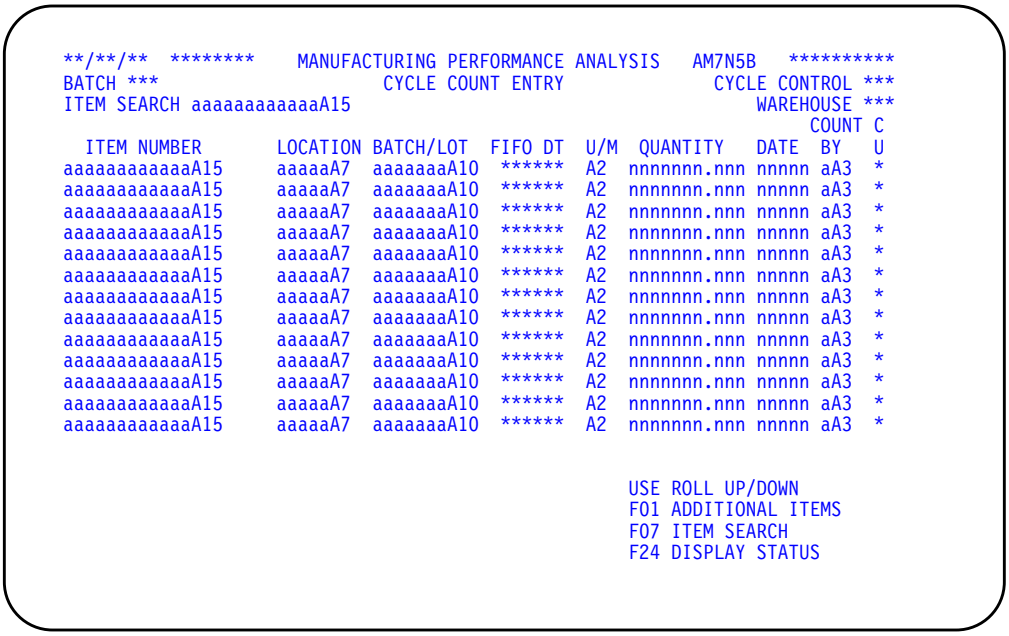
RECORDS USED. The number of transaction records entered in the batch.

RECORDS ERRORS. The number of transaction records in the batch for which errors have been found.

AM7N5B—Cycle Count Entry

This display allows the entry of the actual cycle counts.

This display appears after you select the batch for count entry on the Cycle Count Entry Batch display (AM7NZ1).



Function keys

F01 ADDTNL ENTRIES causes the Count Entry display (AM7N5E) to appear, which allows entry of items that are not in the entry batch.

F07 ITEM SEARCH activates the Item Search for the item number entered in the ***ITEM SEARCH*** field. When you enter an item number in the ***ITEM SEARCH*** field and press this function key, the display shifts so the line for that item is at the top of the display and the cursor is placed in the ***QUANTITY*** field of the selected item number so you can enter the count quantity.

F24 DISPLAY STATUS causes the item counts to be accepted and shows the totals for the entry batch.

Fields

BATCH. The number of the batch with which you are working.

WAREHOUSE. The warehouse for the counted item. This is a system-supplied field.

ITEM SEARCH. The item number you want to search for in the entry batch. To use this field you must use **F07**. Type in the item number and use **F07**.

ITEM NUMBER. The item number of the counted item. This is a system-supplied field.

LOCATION. The counted item's stock location. This is a system-supplied field.

BATCH/LOT. The batch or lot number assigned to the item in this location. This is a system-supplied field.

FIFO DT. The FIFO date assigned to the item in this location. This is a system-supplied field.

U/M. The unit of measure of the count. This is a system-supplied field.

QUANTITY. The quantity actually counted. This field is required.

DATE. The date of the count. This field is required but, if blank, defaults to the previously entered date when the **ROLL** key is used to go to the next group of items.

COUNT BY. The initials of the person who counted the item. This field defaults to the previous COUNT BY entry if you leave it blank.

C U. This field indicates that a count entry has been made for this item.

C A count has been entered.
U A count has not been entered.

AM7N5E—Cycle Count Entry–Additional Items

This display allows you to enter items not in the cycle count batch.

This display appears if you use **F01** on the Count Entry display (AM7N5B).

```
**/**/**  ********    MANUFACTURING PERFORMANCE ANALYSIS   AM7N5E   **********
BATCH ***                     CYCLE COUNT ENTRY                CYCLE CONTROL ***
ADDITIONAL ITEMS
                                                                       COUNT C
  ITEM NUMBER        LOCATION BATCH/LOT  FIFO DT  U/M  QUANTITY   DATE   BY  U
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn  aA3 *
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn  aA3 *
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn  aA3 *
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn  aA3 *
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn  aA3 *
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn  aA3 *
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn  aA3 *
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn      *
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn      *
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn      *
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn      *
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn      *
aaaaaaaaaaaaA15     aaaaaA7  aaaaaaaA10  nnnnnn  **  nnnnnnn.nnn nnnnn      *



                                                     USE ROLL UP/DOWN
                                                     F23 END ADDITIONAL ITEMS
```

Function keys

F23 END ADDTNL ADDS causes the item counts to be accepted. The Cycle Count Entry display (AM7N5B) appears.

Fields

BATCH. The number of the batch with which you are working.

ITEM NUMBER. The item number of the counted item. This is a required field.

LOCATION. This is a required field if this item is in a controlled warehouse. The counted item's stock location.

BATCH/LOT. This is required field if this item is a controlled batch/lot item. The batch or lot number assigned to the item in this location.

FIFO DT. This is a required field for items in a warehouse with FIFO date controls.

U/M. The unit of measure of the item. You cannot enter anything in this field. The system fills in this field with the Unit of Measure from the Item Master file.

QUANTITY. The quantity actually counted. This is a required field.

DATE. The date of the count. This defaults to the previously entered date if it is blank.

COUNT BY. The initials of the person who counted the item. This defaults to the previous COUNT BY entry if you leave it blank.

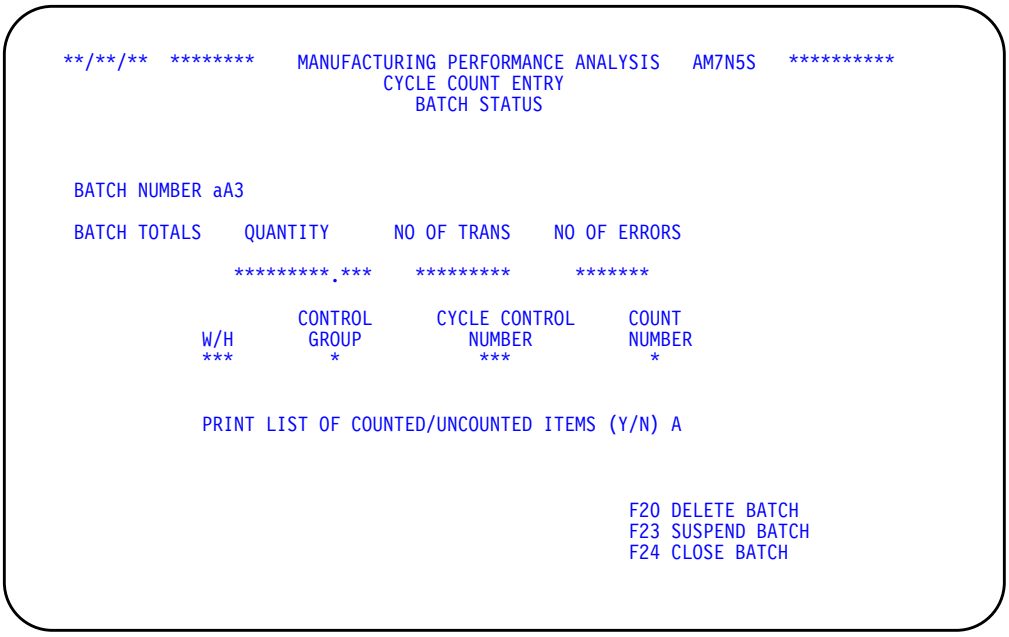
C U. This field indicates that a count entry has been made for this item.

C A count has been entered.
U A count has not been entered.

AM7N5S—Cycle Count Entry–Batch Status

This display allows you to review the cycle count entry batch to be evaluated for record accuracy.

This display appears when you select **F24** on the Cycle Count Entry display (AM7N5B).



Function keys

F20 DELETE BATCH deletes the batch of data you entered. You are asked to select **F20** again to be sure that the first selection was not in error. After selecting **F20** a second time, the batch is deleted.

F23 SUSPEND BATCH marks the current transaction entry batch as suspended.

F24 CLOSE BATCH marks the current transaction batch as closed.

Fields

BATCH NUMBER. Type in the batch number of the count entry batch to be compared and posted. This field is required.

BATCH TOTALS.

QUANTITY. Total quantity for all counted items in this batch.
NO OF TRANS. Number of transactions in this batch (including records in error).
NO OF ERRORS. Number of transactions in error in this batch.

W/H. Warehouse for this batch.

CONTROL GROUP. The control group for this batch.

CYCLE CONTROL NUMBER. System-assigned number used when selecting items to be counted and when adjusting balances. This field is required when selecting items for a second or third count.

COUNT NUMBER. The count number for this batch.

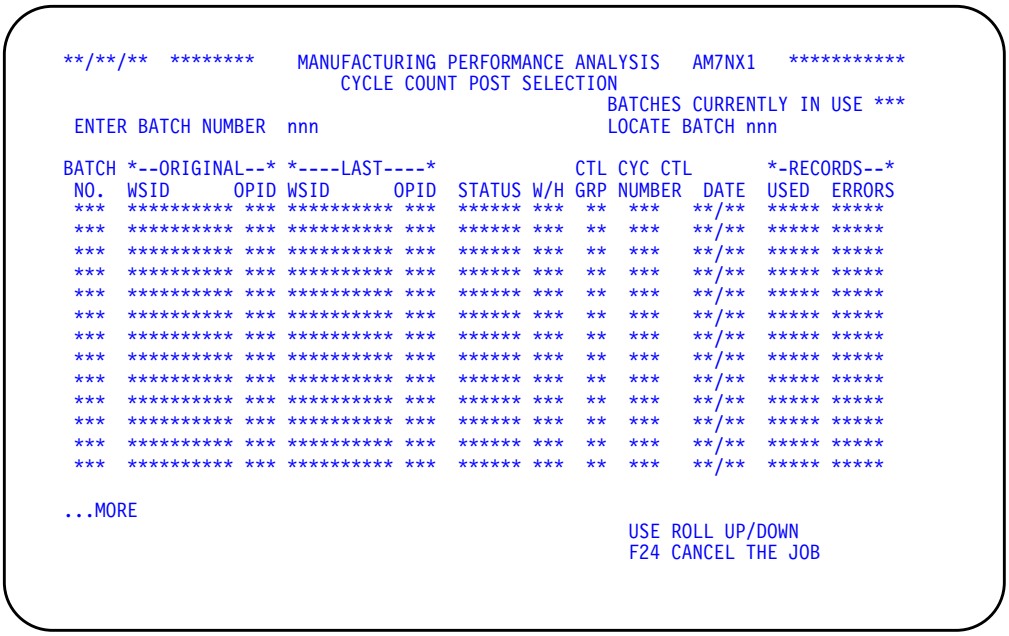
PRINT LIST OF COUNTED/UNCOUNTED ITEMS (Y/N). Enter **Y** if you want a listing of counted and uncounted items in the batch.

Option 3: Count Posting

AM7NX1—Cycle Count Post Selection

This display allows you to select a Cycle Count Batch for entry of the actual counts.

This display appears when you select option 3 from the Cycle Count menu.



Function keys

F24 END JOB causes the job to be canceled and the Cycle Count menu to appear.

Fields

BATCHES CURRENTLY IN USE. Shows you the number of batches currently in use.

ENTER BATCH NUMBER. Type in the number of an existing batch with which you want to work.

LOCATE BATCH. Use this field to search for a specific batch with which you want to work. The batch you select appears at the top of the list of batches on the display.

BATCH NO. (Batch Number). Enter the cycle count batch number from the Cycle Count List or Inventory Tags for the counted Items.

ORIG WSID (Original Work Station Identification). The identification of the work station where transactions for the batch were originally entered and the operator who entered them. The operator ID appears only if password security is in effect.

LAST WSID (Last Work Station Identification). The identification of the work station where the batch was last selected and the operator who selected it. The operator ID appears only if password security is in effect.

STATUS. One of the following appears:

ACTIVE Indicates either that another work station is using the batch or that it is incomplete because of some abnormal condition, such as loss of power. You can work on an active batch that is incomplete from the work station that started it.

SUSPND (Suspend) Indicates that you selected **F23** from a batch status display to end the work station session, or that the Manufacturing Performance Analysis application has automatically suspended a batch. You can select a suspended batch from any work station.

CLOSED Indicates that you selected **F24** from a batch status display to end the work station session. Generally, a batch should not be closed until after a report is printed and you have verified that the batch is correct and complete. For data entry, a closed batch is treated the same as a suspended batch.

DELETE Indicates that you selected **F20** to delete the batch.

UPDATE Indicates that you chose the batch for update for cycle count post selection.

FINISH Indicates that the batch has been applied to the master files.

W/H. The warehouse for the counted item. This is a system-supplied field.

CONTROL GROUP. The control group for the batch.

CYCLE CTL NUMBER. System-assigned number used when selecting items to be counted and when adjusting balances.

DATE. The creation date or the date of last activity for the batch.

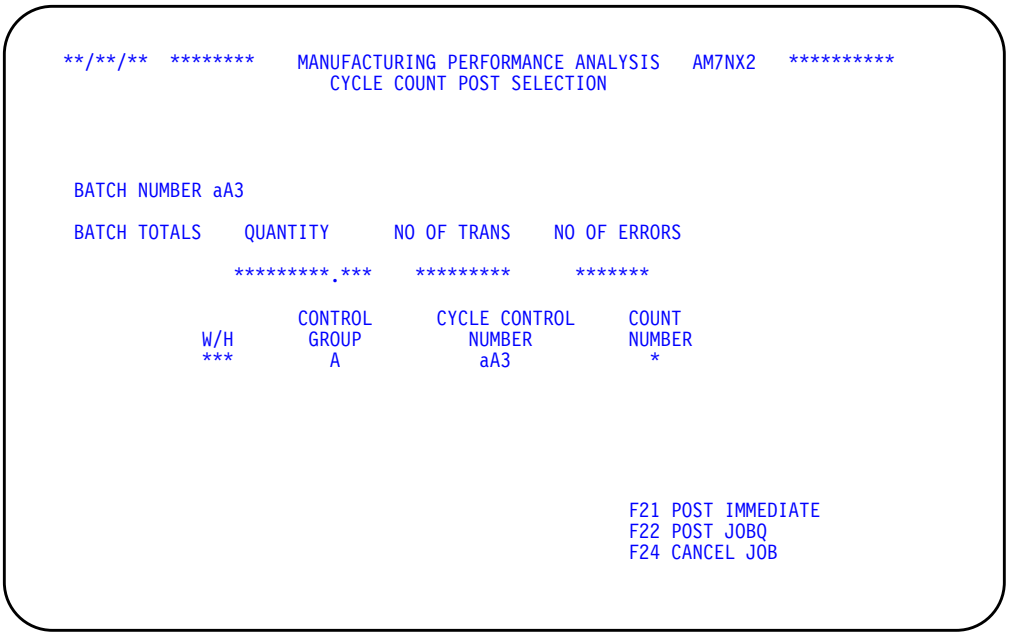
RECORDS USED. The number of transaction records that have been entered in the batch.

RECORDS ERRORS. The number of transaction records in the batch for which errors have been detected.

AM7NX2—Cycle Count Post Selection

This display allows you to review the cycle count entry batch to be evaluated for record accuracy.

This display appears when you select a batch on the Cycle Count Post Selection display (AM7NX1).



Function keys

F21 POST IMMEDIATE posts the counts for this batch and causes the Cycle Count Posting Report to be printed. Using this key inhibits input until the posting job is complete.

F22 POST JOBQ submits the post to the job queue and causes the Cycle Count menu to appear.

F24 CANCEL JOB causes the job to be canceled and the Cycle Count menu to appear.

Fields

BATCH NUMBER. Type in the batch number of the count entry batch to be compared and posted. This field is required.

BATCH TOTALS.

QUANTITY. Total quantity for all counted items in this batch.
NO OF TRANS. Number of transactions in this batch (including records in error).
NO OF ERRORS. Number of transactions in error in this batch.

W/H. Warehouse for this batch.

CONTROL GROUP. Enter **Y** to indicate that you are selecting a control group for counting. Enter a **N** to indicate that you are selecting items for counting that do not belong to a control group. You can select a control group or noncontrol group items but not both simultaneously.

CYCLE CONTROL NUMBER. System-assigned number used when selecting items to be counted and when adjusting balances. This field is required when selecting items for a second or third count.

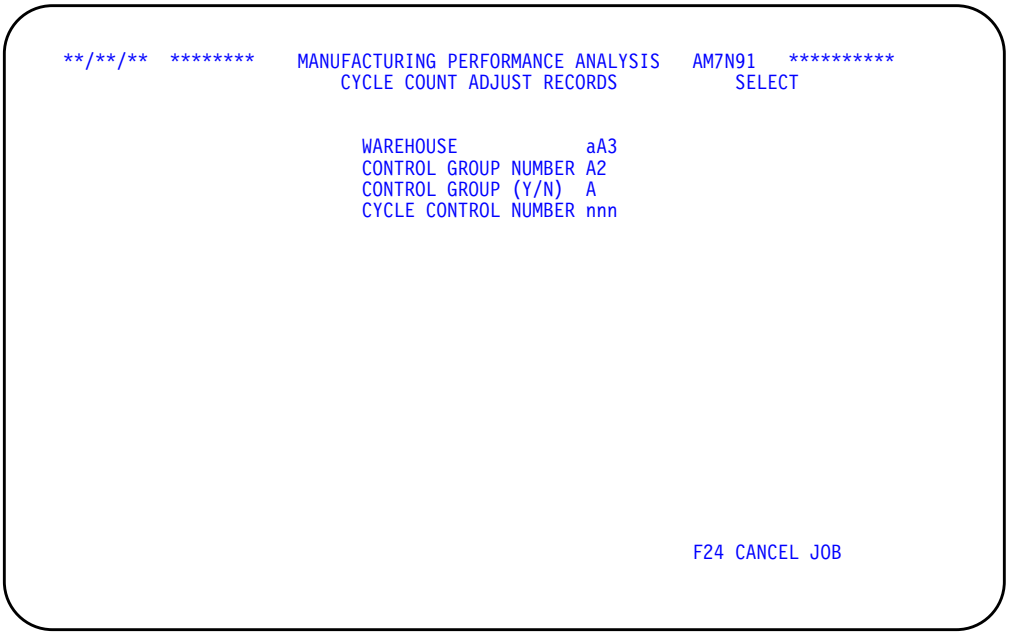
COUNT NUMBER. The count number for this batch.

Option 4: Inventory Adjustment

AM7N91—Cycle Count Adjust Records (Select)

This display allows you to select and review items for inventory variances and create inventory record adjustment transactions. Type in your selections and press **Enter** to review the items that are in the group selected and have been counted and found to have an inaccurate record. These items are selected and shown item at a time. The Cycle Count Adjust Records display (AM7N92) appears.

This display appears when you select option 4 on the Cycle Count menu.



Function keys

F24 CANCEL JOB causes this job to be canceled. The Cycle Count menu appears.

Fields

WAREHOUSE. The warehouse for the items to be reviewed for record adjustment.

CONTROL GROUP NUMBER. The two-digit control group code for the items to be reviewed for record adjustment.

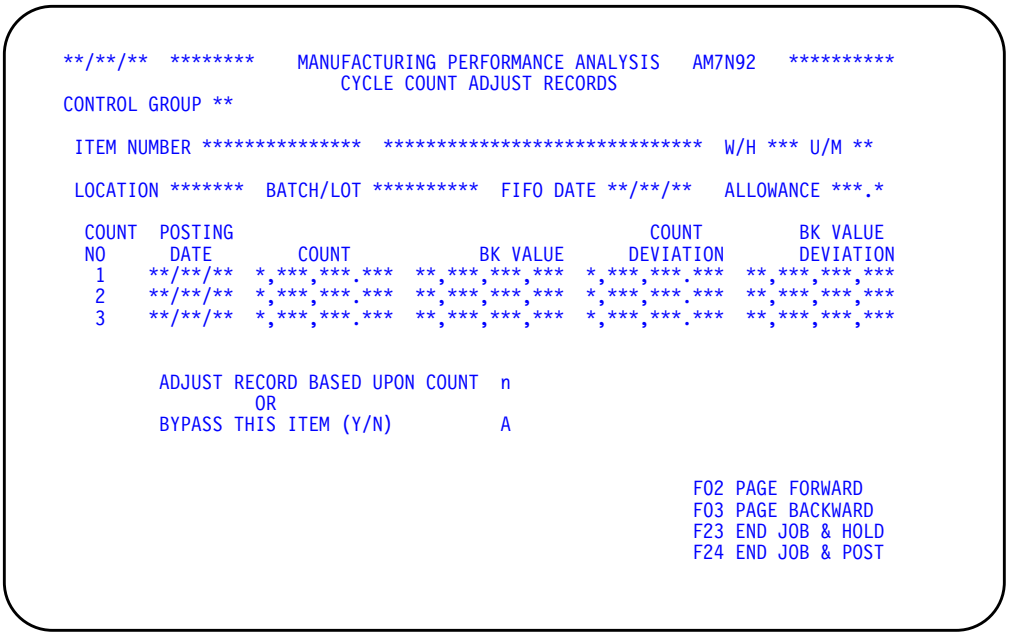
CONTROL GROUP (Y/N). Type **Y** or **N** to indicate if you want to select control group items or not. If you have entered a control group number, you must select Y.

CYCLE CONTROL NUMBER. This field was assigned by the system when count one was selected for this item. This is a required field.

AM7N92—Cycle Count Adjust Records

This display allows you to set the inventory record adjustment transaction based on a specific count.

This display appears when you press **Enter** on the Cycle Count Adjust Records (Select) display (AM7N91).



Function keys

F02 PAGE FORWARD causes the adjustment selection to be logged and the next item to appear.

F03 PAGE BACKWARD causes the adjustment selection to be logged and the previous item to appear.

F23 END JOB & HOLD ends the job. Selected items are held until the batch is selected for post.

F24 END JOB & POST causes the selected adjustments to be submitted to the job queue for posting. The transactions are posted to Inventory Management as cycle count adjustment transactions.

Fields

CONTROL GROUP. The control group to which this item belongs.

ITEM NUMBER. The item number and description of the item whose inventory record can be adjusted.

W/H. The warehouse for this item.

U/M. The unit of measure for this item.

LOCATION. The stock location for this count.

BATCH/LOT. The batch or lot number assigned to the item in this location. This is a system-supplied field.

FIFO DATE. The FIFO date for this item.

ALLOWANCE. The inventory record variance percentage allowed for this item.

COUNT NUMBER. The results of the specified count: 1, first count; 2, second count; 3, third count.

POSTING DATE. The date of each count.

COUNT. The actual quantity counted.

BK VALUE. The on-hand balance at the time of the count comparison for each count.

COUNT DEVIATION. The difference between the on-hand balance and the counted quantity for each count.

BK VALUE DEVIATION. The inventory cost dollar value of the difference between the on-hand balance and the counted quantity for each count.

ADJUST RECORD BASED UPON COUNT. Type in the number of the count: 1, 2 or 3 that you want the adjustment calculation based on. The adjustment is calculated as ADJUST QUANTITY = COUNT - BOOK

BYPASS THIS ITEM (Y/N). If you want no adjustment to be made for item, enter **Y**. If a count number is entered, the ***BYPASS THIS ITEM*** field must be **N**.

Appendix A. Sample table of Measurement Master defaults

The following tables may assist you when you are selecting Manufacturing Performance Analysis measurements. See the discussion of these defaults in Chapter 2 “Implementing and Using”.

MPM	Description
1	Customer order booking performance
2	Customer order backlog analysis
3	Master schedule performance
4	Shipping performance
5	Inventory performance profile
6	Inventory record accuracy
7	Bill of materials record accuracy
8	Purchase commitment performance
9	Order reschedule reliability
10	Order release reliability
11	Material availability performance
12	Queue performance
13	Output performance
14	Inventory turnover trend
15	Excess inventory analysis

Note: If EPDM is activated, measurements 7, 12, and 13 are disabled.

Table A-1. Measurement Master defaults

MPM	Frequency	Low target value	High target value	Dollar basis	Unit basis	# of history periods	# of forecast periods (history + forecast = 26)	Default date for past due R/M	Cost calculation method	Use req/planned orders in MRP	Include schedule receipts	# of periods to determine availability	Include customer reqs in availability calculations	Excess period lengths
1–Booking						23	3							
2–Backlog						26	0							
3–MSP						23	3							
4–Shipping						26	0							
5–Inventory Performance						23	3							
6–Inventory Record						26	0							
7–BOM						26	0							
8–POs						25	1							
9–Order reschedule						26	0							
10–Order release						26	0							
11–Material availability						26	0							
12–Queue						25	1							
13–Output						25	1							
14–Inventory Turnover						26	0							
15–Excess Inventory						26	0							

Notes:
1 (Booking), 2 (Backlog), and 4 (Shipping) should be the same frequency.
3 (MSP) should be a frequency equal to changes to your master production schedule.
5 (Inv perf) and 14 (Inv turn) should be the same.
6 (Inv record) should correspond to your cycle counting frequency.
7 (BOM), 12 (Queue), and 13 (Output) depend on order closeout and purge in IM and PCC
9 (Order reschedule), 10 (Order release), and 11 (Material avail) correspond to MRP regeneration or re-plan inventories.

Appendix B. Security areas

The options on the CAS Security Maintenance menu (AMZM38) allow you to protect application tasks from unauthorized users. You can define security areas and then define specific tasks associated with each area.

Security areas protect access to a group of menu options. The following table shows the application security areas and their associated menu options and task IDs. To print a report of all application areas, see the description of the Generate reports option in the Security Maintenance chapter of the *CAS User's Guide*.

Note: If EPDM is activated, options associated with MPM 7, 12, and 13 are disabled except in Inquiry and Reports.

Security area	Menu/option	Description	Task ID
Close Simulation	AM7M00/3	Close Simulation	AM7M0003
Cycle Count -Adjustment	AM7M40/4	Inventory Adjustment	AM7M4004
Cycle Count - Select, Entry, Post	AM7M40/1	Count Select	AM7M4001
	AM7M40/2	Count Entry	AM7M4002
	AM7M40/3	Count Posting	AM7M4003
File Maintenance	AM7M30/1	Customer Order History	AM7M3001
	AM7M30/2	Item Measurements	AM7M3002
	AM7M30/3	Planner History	AM7M3003
	AM7M30/4	Work Center Performance	AM7M3004
	AM7M30/5	Inventory Performance	AM7M3005
	AM7M30/6	Accuracy Tolerance	AM7M3006
Inquiry	AM7M10/1	Customer Order Booking Performance	AM7M1001
	AM7M10/2	Customer Order Backlog Analysis	AM7M1002
	AM7M10/3	Master Schedule Performance	AM7M1003
	AM7M10/4	Shipping Performance	AM7M1004
	AM7M10/5	Inventory Performance Profile	AM7M1005
	AM7M10/6	Inventory Record Accuracy	AM7M1006
	AM7M10/7	Bill of Materials Record Accuracy	AM7M1007
	AM7M10/8	Purchase Commitment Performance	AM7M1008
	AM7M10/9	Order Reschedule Reliability	AM7M1009
	AM7M10/10	Order Release Reliability	AM7M1010
	AM7M10/11	Material Availability Performance	AM7M1011
	AM7M10/12	Queue Performance	AM7M1012
	AM7M10/13	Output Performance	AM7M1013
	AM7M10/14	Inventory Turnover Trend	AM7M1014
	AM7M10/15	Excess Inventory Analysis	AM7M1015
Measurement Master	AM7M30/7	Measurement Master	AM7M3007
Period Close	AM7M00/4	Period Close	AM7M0004

Security area	Menu/option	Description	Task ID
Reports	AM7M20/1	Customer Order Booking Performance	AM7M2001
	AM7M20/2	Customer Order Backlog Analysis	AM7M2002
	AM7M20/3	Master Schedule Performance	AM7M2003
	AM7M20/4	Shipping Performance	AM7M2004
	AM7M20/5	Inventory Performance Profile	AM7M2005
	AM7M20/6	Inventory Record Accuracy	AM7M2006
	AM7M20/7	Bill of Materials Record Accuracy	AM7M2007
	AM7M20/8	Purchase Commitment Performance	AM7M2008
	AM7M20/9	Order Reschedule Reliability	AM7M2009
	AM7M20/10	Order Release Reliability	AM7M2010
	AM7M20/11	Material Availability Performance	AM7M2011
	AM7M20/12	Queue Performance	AM7M2012
	AM7M20/13	Output Performance	AM7M2013
	AM7M20/14	Inventory Turnover Trend	AM7M2014
	AM7M20/15	Excess Inventory Analysis	AM7M2015

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