

File Maintenance

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Functional Overview

SMS contains extensive data base structures which have a wide range of both data and calculations relative to inventory stock management. Only a portion of the SMS data base contents are manually entered - the override and adjustment portion. All other contents are determined through analysis modules which automatically update the data base. In turn, this data is used for resulting calculations. SMS Maintenance Options provides the SMS user with the capability to control or globally change data to help customize SMS to a specific inventory operation. There are two types of maintenance as reflected on the two buttons shown. These maintenance functions are discussed in this section.

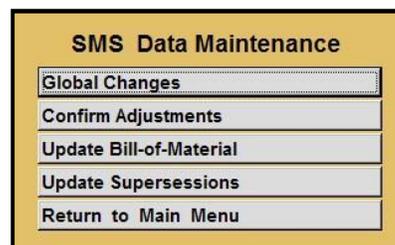
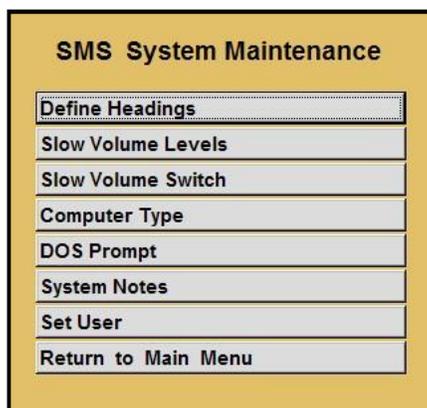


There are two selection menus for Stock Management Maintenance. System Maintenance is used to set field headings, computer types, set user names, etc. These should be set and left in place.

Data Maintenance is used for updating common files which are not changed every week. SMS users can globally change data through his maintenance section as well.

Both Maintenance %sub menus+are displayed below. The following pages explain each of the buttons on these %sub menus+.

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System Maintenance

This menu allows access to system environment variables rather than data variables. Anything that may be set in this menu area would likely be on-going. Usually, these are set at the beginning of implementation.

Each Specific button is explained below:

Screen Header Definitions

Level 4:

Level 3:

Level 2:

Define Headings

This selection enables the user to define what the key fields (i.e., Level 4 (Location), Level 3, Level 2) are used for and what "heading" is shown. Whatever is entered in these fields will display on all screens and reports where appropriate. This allows customization of the Stock Management System field names without re-compiling programs or re-writing code. These fields can be changed at any time.

"Slow Moving" Volume Limit

This is the threshold level of annual item usage (issues or sales volume) - below which an item is considered to be "slow moving" - makes such an item subject to "slow moving" calculation logic to determine safety stock values.

Volume Level :

Slow Volume Level:

This allows the user to specify a cutoff level below which an item is considered slow moving. If set to 24, this means that less than 24 units used during the past 2 years qualify the item as slow moving. Slow moving items are subject to slow moving logic to set safety stocks when no forecast can be determined (see Appendix C).

"Slow Moving" Control Switch

This switch turns on safety stock calculation for maintenance, distribution or manufacturing inventories.

- "Slow Moving" shows "R" on screen
- "Lumpy Demand" shows "L" on screen
- "Normal Logic" shows "Blank" on screen

Slow Moving Lumpy Demand Normal Logic

Slow Volume Switch:

The selection allows the user to turn on (or turn off) the slow moving switch. In some DRP inventory operations, an item with little or no usage can be set as Lumpy Demand to plan some Safety Stock for these items. In Maintenance inventories, seldom used items can be set as Slow Moving to plan at least some critical spares if needed. Even if these items have not been used for two years, they may still be required as a critical spare.

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Set Your Computer Type

Desktop	This choice addresses your number pad. Some users use a desktop computer - others a mobil laptop. Desktop = number pad turned on. Laptop = number pad turned off.
Laptop	
Return	

Current Setting **Laptop**

Computer Type

This allows the user to set Stock Management to operate on a laptop computer or a desktop computer. When set to laptop computer, Stock Management turns off the %number pad+ portion of the keyboard. When set to desktop computer, Stock Management turns on the %number pad+.



DOS Prompt

This allows the user to access a %DOS+window. Virtually never used, this may be needed for diagnostic purposes if help is needed. Decision Associates may need the user to access this window to check file status or identify program dates and versions. This is only used when in a %help session+with Decision Associates personnel.

Only one copy is in use at present. More copies can be activated at any time. Each SMS copy will have the same functionality, but will be specific to the individual user. Once additional licenses are activated, each user will be able to load SMS and specify the user name.

Press any key to return

System Notes

Reference notes are helpful for each SMS implementation. These are created during installation and may be updated as enhancements are installed. Although this cannot be accessed by the user, it does serve as a helpful reminder when trying to remember what was done, when it was done and why it was done.

Set User

Single User
Not Used
Not Used
Not Used
Return to Main Menu

Set User

All SMS copies at any given company are the same. Each user sets his or her name by clicking the appropriate button. This, in turn, tells SMS which specific items to retrieve and process each week when the user completes the ordering procedure. In this case, only one person runs SMS at this company so SMS defaults to a single user. Many companies have multiple users which makes this function extremely important.

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Data Maintenance

These menu selections are used for updating peripheral files into Stock Management. They will impact the final calculations found in the system, but may not be used often. File Maintenance selections are shown below:

Each specific button is explained below:

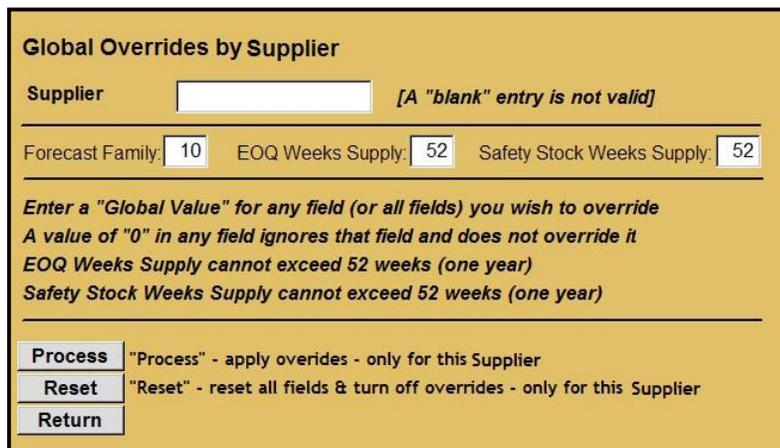


The screenshot shows a menu titled "Global Change Overrides" with four options: "Global Changes by Location", "Global Changes by Product Group", "Global Changes by Supplier", and "Return to Main Menu".

Global Change Overrides

These global changes are overrides that can be applied by grouping. This makes user control somewhat easier than making individual overrides to stock items. These can be applied by the standard three grouping levels available in Stock Management, This example shows Location, Product Group and Supplier. but these could be whatever names have been specified by the user.

Once a selection is made, the Global Change view (shown below) will enable the user to change three fields. Those fields are Forecast Family, EOQ Weeks Supply and Safety Stock Weeks Supply. These three fields can also be changed individually in the Master View as well.



The screenshot shows the "Global Overrides by Supplier" screen. It includes a "Supplier" field with a text input box and a note "[A 'blank' entry is not valid]". Below this are three input fields: "Forecast Family: 10", "EOQ Weeks Supply: 52", and "Safety Stock Weeks Supply: 52". There is a section of instructions: "Enter a 'Global Value' for any field (or all fields) you wish to override. A value of '0' in any field ignores that field and does not override it. EOQ Weeks Supply cannot exceed 52 weeks (one year). Safety Stock Weeks Supply cannot exceed 52 weeks (one year)". At the bottom are three buttons: "Process" (with description: "Process" - apply overrides - only for this Supplier), "Reset" (with description: "Reset" - reset all fields & turn off overrides - only for this Supplier), and "Return".

This screen requires a grouping as shown. Simply leaving the grouping blank will not create any overrides and will not globally override any items in the database.

The three fields which can be globally overridden are shown on the screen. The user can specify one, two or all three fields when processing the global change.

The Reset selection will erase all overrides for this grouping. This Reset includes erasing any individual overrides which may have been set on the Master View screen.

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Confirm Adjustments

This button has no screen. It is an %action+button which scans existing databases for forecast adjustments. These adjustments may have been made on the Master View screen (Forecast Analysis section) or the Financial Summary screen (Location, Level 3, Level 2 screens). They are combined into a permanent adjustment file and used until further modified.

Remember, if adjustments are made - but not confirmed - then they will be obliterated on the next weekly batch process. Be careful to confirm when you do make adjustments!

Update Bill-of-Material

This button has no screen. It is an %action+button that reads the file sent from the host containing the Bill-of-Material relationships. This file will be called BILL.DAT and will be an ASCII file as formatted in Appendix B. This file should be sent and updated once every month. The %bill+structures do not usually change weekly.

Update Supersessions

This button has no screen. It is an %action+button that reads the file sent from the host containing supersession data (i.e., which part replaces the old part, how many replace how many of the old, etc.). This file will be called SUPER.DAT and will also be an ASCII file as formatted in Appendix B like the file CMASTER.DBF.