

*myridas*TM *User Guide*

Version 9.1 for Microsoft DynamicsTM GP 9.0

Advanced Inventory Replenishment

Trinity Computer Services Limited

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Using this Guide

The graphics in this document are best viewed or printed with Adobe Acrobat Reader version 4.0 or above.

This guide provides user notes for the Myridas Advanced Inventory Replenishment module:

- Advanced Inventory Replenishment



The mouse symbol has been used throughout the manual to help guide you to the location of windows in the software. See [Appendix A](#) for a list of Myridas windows and their location in the software.

A full range of tutorials is also available on our website, <http://www.trinitypartner.com>.

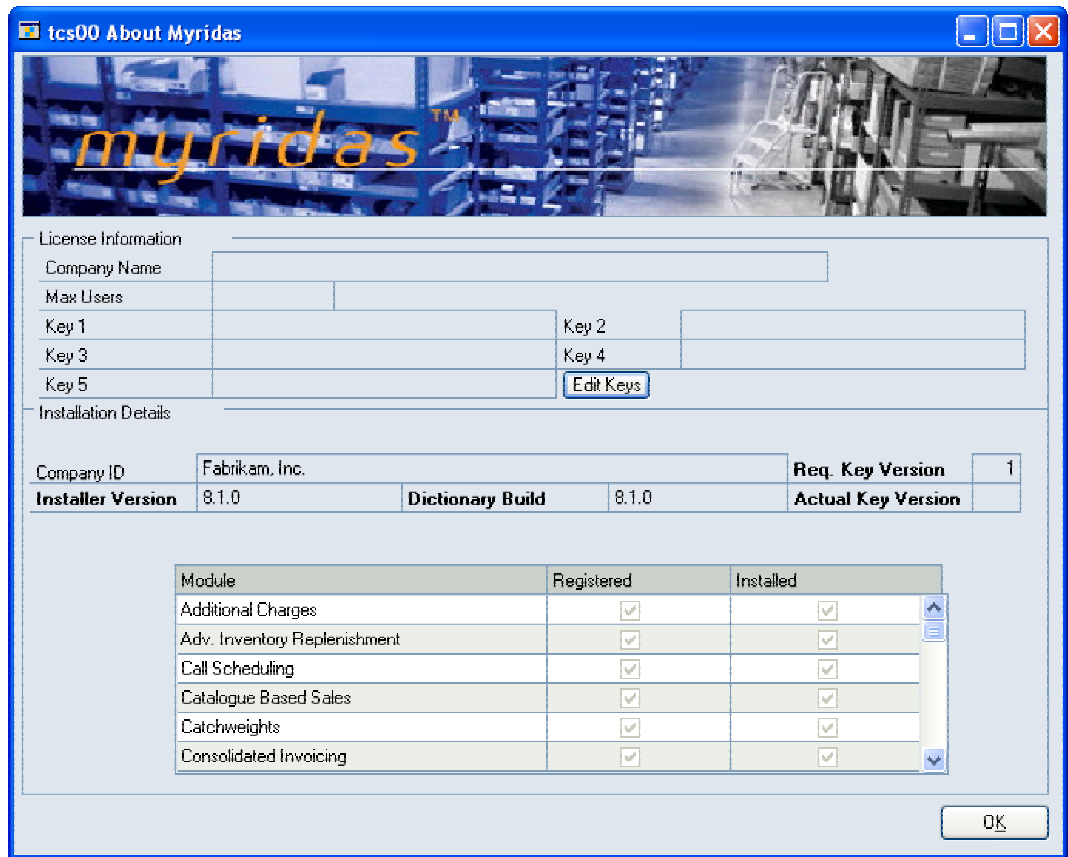
About Myridas



Help >> About Myridas

Use the About Myridas window to check your license information and installation details. The window will tell you which Myridas modules you are registered to use and which have been installed on your system.

The About Myridas window



Advanced Inventory Replenishment

The Advanced Inventory Replenishment module provides you with functionality to accurately record and analyse your stock demand. You can set up calendars on which to define period demand using the [Calendar Maintenance window](#). You can then select from a number of industry standard inventory replenishment calculations to predict stock demand. Item / site demand can be reviewed and maintained through the feature-rich [Demand Review window](#) and the analysis used as a basis for automatically generating purchase orders.

The main features of the Advanced Inventory Replenishment module are:

- Set up user-defined calendars on which to record stock demand figures
- Select specified items / sites for inclusion in inventory replenishment
- Predict stock demand figures on a variety of industry standard calculation methods
- Flexibility to use different calculation methods for different items / sites
- Rank items by their demand
- Comprehensive review of inventory replenishment figures
- Manually adjust stock demand figures as required
- New line point quantity included in automatic purchase order generation
- Drill-downs and enquiries to provide comprehensive detail of inventory replenishment figures

Note that the Myridas Vendor Price Management module is a pre-requisite for the Advanced Inventory Replenishment module.

Calculation Method Types

The Advanced Inventory Replenishment module has been designed to reflect standard industry methods for calculating, analysing and planning inventory replenishment. Calculation method types are enabled using the [Calculation Methods Maintenance window](#) and can be assigned to item / site combinations using the [Item / Site Range Allocation window](#) and the [Item / Site Inventory Replenishment Maintenance window](#). You can view how various calculation methods calculate demand for an item using the [Demand Review - Calculation Method Analysis window](#) and select alternative calculation methods as required.

It is recommended that before using the inventory replenishment module you familiarise yourself with the inventory replenishment white papers written by Jon Schreibfeder and available for download from the Microsoft website.

http://www.microsoft.com/BusinessSolutions/industry/wholesale_distribution_whitpapers.aspx

Calendars and Demand Periods

Calendars on which to define period demand for item / site combinations are set up using the [Calendar Maintenance window](#). You can choose to set up calendars based on three period frequency types:

Calendar Monthly	Demand will be recorded in 12 periods per year
Four Weekly	Demand will be recorded in 13 periods per year
Weekly	Demand will be recorded in 52 periods per year

If required you can create calendar years for each period frequency type. Once you have set up calendars and periods you can assign a period frequency type to item / site combinations using the [Inventory Replenishment Setup window](#). You can then specify a monthly period demand for an item / site combination using the [Item / Site Inventory Replenishment Maintenance window](#). The monthly period demand can be reviewed for suitability using the [Demand Review window](#) as and when required.

Item Ranking

Item ranking functionality enables you to assign ranks to items based on their usage. For example, your most popular items would be rank A whilst your least popular items would be rank X. Assign ranks to multiple items using the [Inventory Replenishment - Item Ranking wizard](#) or single items using the [Item / Site Inventory Replenishment Maintenance window](#). You can select to filter items by rank when reviewing demand figures in the [Demand Review window](#).

Line Point Quantity

The line point quantity is used as an alternative trigger to the order point quantity in [Purchase Order Generator](#). It is made up of the minimum weeks stock + creditor lead time (weeks) + creditor period frequency x current weekly demand

For further details how line point quantities are used in inventory replenishment please refer to the inventory replenishment white papers written by Jon Schreibfeder and available for download from the Microsoft website.

http://www.microsoft.com/BusinessSolutions/industry/wholesale_distribution_whitepapers.aspx

Setup

1. Inventory Replenishment Setup Wizard

Tools >> Setup >> Myridas >> Inventory Replenishment >> New Installation Setup Wizard

Use the Inventory Replenishment Setup Wizard to

- Set calendars for all years/periods which are to have demand recorded
- Assign initial values for calculation method type, minimum days stock and order up to days
- Build up demand history from posted invoices
- Assign ranks to items

1.1 Setting Up Inventory Replenishment using the Inventory Replenishment Setup Wizard

To set up inventory replenishment using the Inventory Replenishment Setup Wizard:

1. On the Welcome window press Next to continue or Cancel to exit.

1.2 The Calendar Setup window

tcs91 Calendar Setup- Setup Wizard

Inventory Replenishment - Calendar Setup

myridas™

Enter the frequency that you would like demand to be recorded;

Period Frequency: Calendar Monthly

Enter the year you want to include demand figures from;

History Year From: 2000 Period Start Date: 01/01/00

Create Calendars for all years up to;

History Year To: 2013

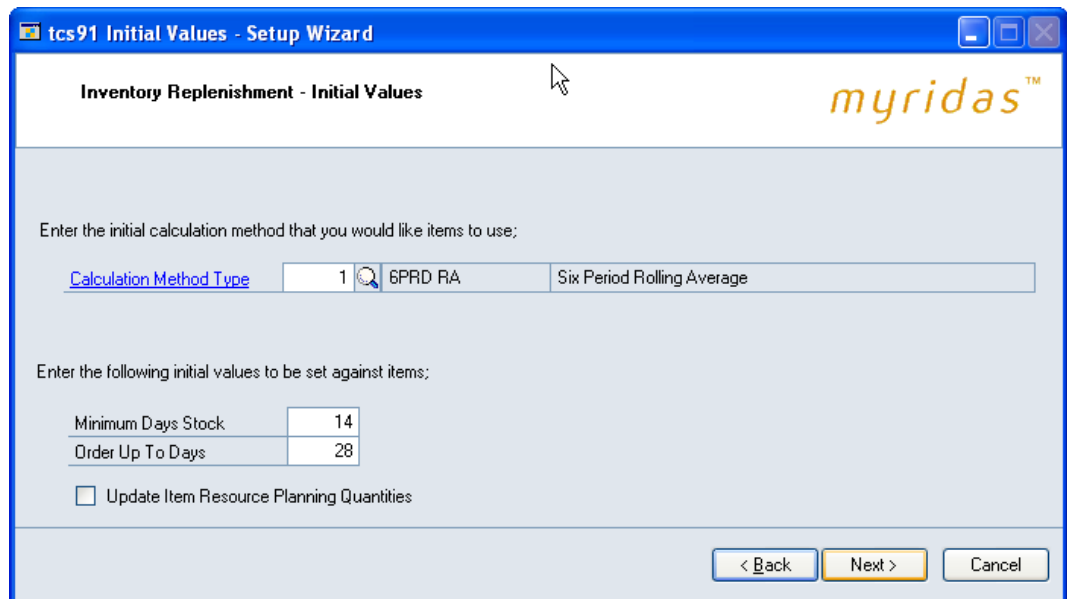
< Back Next > Cancel

- From the Period Frequency drop-down menu select Calendar Monthly, Four Weekly or Weekly. This selection establishes the demand periods to be used.

Calendar Monthly	Demand will be recorded in 12 periods per year
Four Weekly	Demand will be recorded in 13 periods per year
Weekly	Demand will be recorded in 52 periods per year

- In History Year from, enter the earliest year for which you would like to record demand history. Inventory Replenishment calendars will be created starting with this year.
- In Period Start Date enter the start date for the first historical year. This will normally be the start of the financial and / or calendar year.
- In History Year To, enter the latest year for which you would like to create an Inventory Replenishment calendar.
- Press Next to continue to the Initial Values Setup window.

1.3 The Initial Values Setup Window



- Enter a Calculation Method Type to be applied to the items selected in this run of the Setup Wizard. See [Calculation Method Types](#) for more information.
- Enter the Minimum Days Stock to be held for items selected in this run of the Setup Wizard.
- Enter the Order Up To Days for items selected in this run of the Setup Wizard.

4. Select the Update Item Resource Planning Quantities option if you want to update the Order Point and Order up to Levels for the selected items.
5. Press Next to continue to the Item Range Selection window.

1.4 The Item Range Selection Window

The screenshot shows a software window titled "tcs91 Range Selection - Setup Wizard". The window contains a section for "Inventory Replenishment - Range Selection" with the Myridas logo. Below this, there is a prompt: "Enter ranges for items that you want to record demand against:". There are three rows of selection options:

- Item Number:** Radio button for "All" (selected), radio button for "From:", and "To:" fields.
- Generic Description:** Radio button for "All" (selected), radio button for "From:", and "To:" fields.
- Class ID:** Radio button for "All" (selected), radio button for "From:", and "To:" fields.

At the bottom, there is a "Site ID" dropdown menu showing "WAREHOUSE". At the very bottom, there are three buttons: "< Back", "Next >" (highlighted in yellow), and "Cancel".

1. All item numbers, generic descriptions and class IDs will be selected by default. Accept these selections or click the From buttons and enter range values or select them using the lookups.
2. Enter a Site ID or select one using the lookup.
3. Press Next to continue to the Ranking Date Range window.

1.5 The Ranking Date Range Window

tcs91 Ranking Dates - Setup Wizard

Inventory Replenishment - Ranking Date Range *myridas*TM

Enter date range to consider when ranking items from existing history:

Start Date 02032006

End Date 01/03/07

< Back Next > Cancel

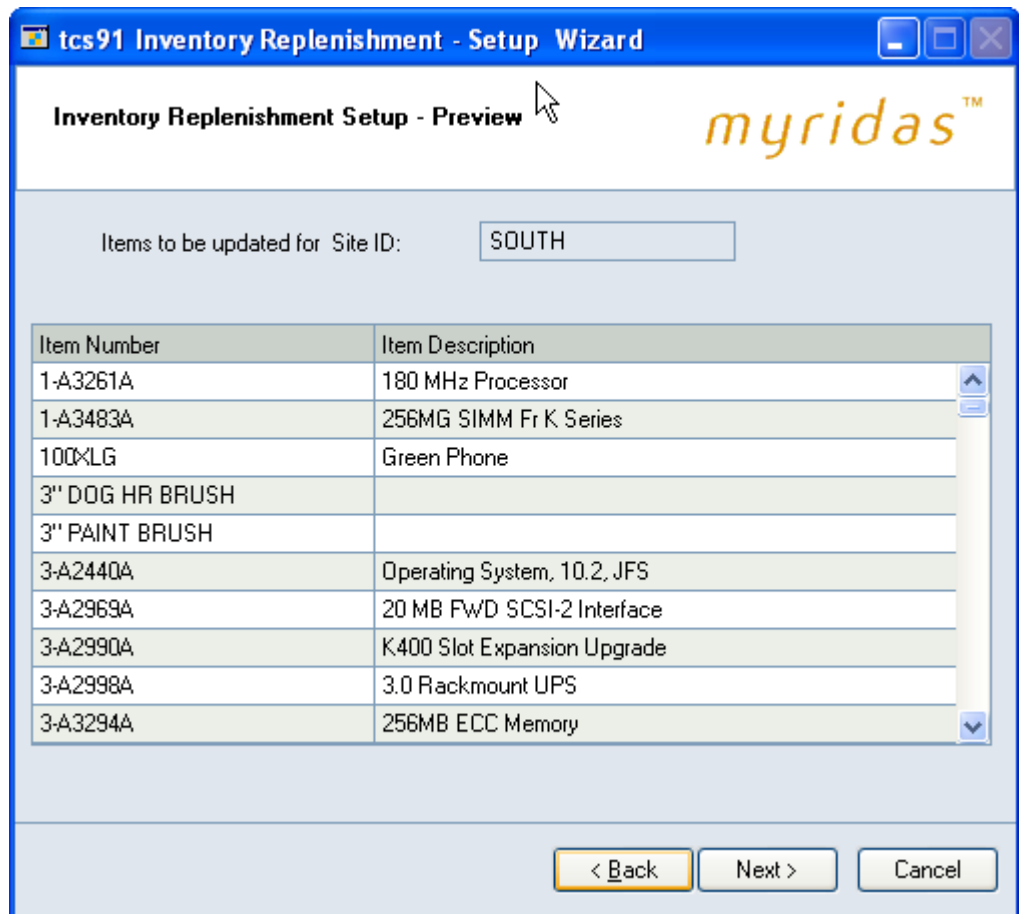
1. When the items selected on the previous screen are processed, demand will be built from historical data and the items will be ranked. In this window, enter the range of dates to be used when ranking the items.
2. Press Next to continue to the Ranking Breakpoints window.

1.6 The Ranking Breakpoints Window

Breakpoint A:	80%
Breakpoint B:	15%
Breakpoint C:	4%
Breakpoint D:	1%
Breakpoint X:	0% (Excluded)

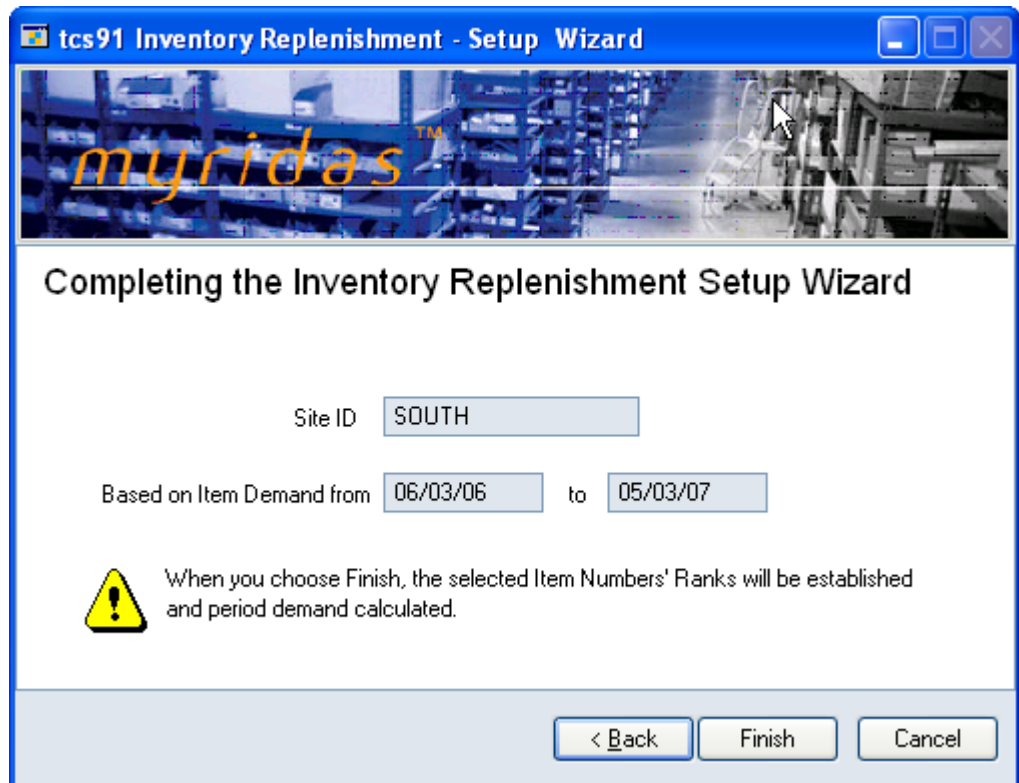
1. Enter the percentage breakpoints, based on Volume of Sales, that will be used to Rank the items processed during this run of the Setup Wizard. The percentages are based on sales transaction quantities. For example, if you have 80% as Breakpoint A and 15% as Breakpoint B then the fastest moving 80% of your stock would achieve Rank A, the next 15% would achieve Rank B and so on.
2. Press Preview to continue to the Inventory Replenishment Setup Preview window.

The Inventory Replenishment Setup Preview Window



1. A list of the items selected for update will be displayed.
2. Press Next to continue to the Inventory Replenishment Setup Wizard Completion window.

1.6 The Inventory Replenishment Setup Wizard Completion Window



1. Press Finish to set up the select range of Items for Inventory Replenishment calculations, to build historical demand and to rank the items.
2. When this process has completed you have the option to Restart the Wizard to set up another range of items, or Close the Wizard.

2. Calendar Maintenance window



Tools >> Setup >> Myridas >> Inventory Replenishment >> Calendar Maintenance

Use the Calendar Maintenance window to:

- Set up calendar years

The Calendar Maintenance window

Period	Period Name	Start	End
1	Jan 07	01/01/2007	31/01/2007
2	Feb 07	01/02/2007	28/02/2007
3	Mar 07	01/03/2007	31/03/2007
4	Apr 07	01/04/2007	30/04/2007
5	May 07	01/05/2007	31/05/2007
6	Jun 07	01/06/2007	30/06/2007
7	Jul 07	01/07/2007	31/07/2007
8	Aug 07	01/08/2007	31/08/2007

2.1 Setting Up Calendars for Inventory Replenishment

To set up calendars for inventory replenishment in the Calendar Maintenance window:

1. From the Period Frequency drop-down menu select Calendar Monthly, Four Weekly or Weekly. This selection establishes what demand periods are to be used.

Calendar Monthly	Demand will be recorded in 12 periods per year
Four Weekly	Demand will be recorded in 13 periods per year
Weekly	Demand will be recorded in 52 periods per year

Note that if required you can create years for each period frequency type.

2. In the Year field enter the year that you want to be enabled for inventory replenishment, or select one using the lookup.

Once you have created an inventory replenishment year, other years you create must be run sequentially to the ones that have already been created. For example, if you have set up the year 2005, you cannot set up the year 2007 until you have set up the year 2006.

3. Enter a description for the year.
4. The first time you create an inventory replenishment year you should enter a date in the Period Start Date field. Any date may be entered though generally it will be the start of the financial and / or calendar year.

The end date for the period will always default to 12 months from the entered start date.

The start date for all entered years will always be the same as that entered for the first created year. For example if you set the period start date for sales pattern year 2005 to be 01/04/05, then the period start date for sales pattern year 2006 would by default be 01/04/06.

5. Click the Calculate button. Period details (period number, period name and period start date) will be generated in the scrolling window. The period name can be amended manually as required.

If you want to reset the period details back to the original defaults click the Calculate button again.

6. Click Save.

Deleting inventory replenishment years

Click the Delete button to delete inventory replenishment years. Note that you can only delete a year that is at one end of a cycle. For example, if you have set up years from 2005 to 2009, you could not delete 2008 until 2009 has been deleted.

3. Inventory Replenishment Setup window

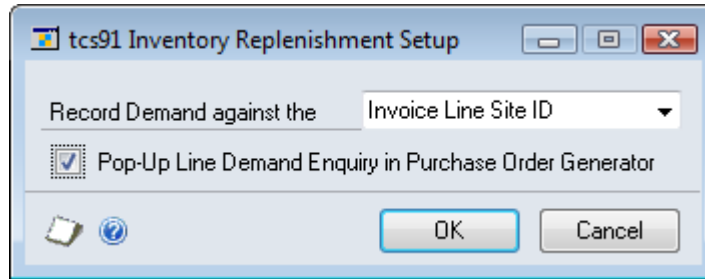


Tools >> Setup >> Myridas >> Inventory Replenishment >> Setup

Use the Inventory Replenishment Setup window to:

- Indicate whether demand should be recorded against the invoice site or the usual site for the delivery address
- Select whether to display the [Suggested PO Line Demand window](#) automatically when running Purchase Order Generator

The Inventory Replenishment Setup window



3.1 Setting Up demand recording

To set up demand recording using the Inventory Replenishment Setup window:

1. From the drop-down menu select whether to record demand against the Invoice Line Site or the Delivery Address Site.
2. Select Pop-Up Line Demand Enquiry in Purchase Order Generator if you would like the [Suggested PO Line Demand window](#) to be displayed automatically from the Suggested Purchase Orders Preview window.
3. Click OK to close the window.

4. Inventory Replenishment Period Frequency Setup window



Tools >> Setup >> Myridas >> Inventory Replenishment >> Period Frequency Setup

Use the Inventory Replenishment Period Frequency Setup window to:

- Set up items and sites for demand recording

The Inventory Replenishment Setup window

Period Frequency: Weekly

The Period Frequency will be applied to the following range of Items and Sites:

Item Number	<input type="radio"/> All	<input checked="" type="radio"/> From:	2-A3284A	<input type="radio"/> To:	256 SDRAM
Generic Description	<input checked="" type="radio"/> All	<input type="radio"/> From:		<input type="radio"/> To:	
Class ID	<input checked="" type="radio"/> All	<input type="radio"/> From:		<input type="radio"/> To:	
Site ID	<input checked="" type="radio"/> All	<input type="radio"/> From:		<input type="radio"/> To:	

Item Number	Site ID	Generic Desc	Class ID
Item Description			

Buttons: Preview, Apply, OK

Note that until you have assigned item / site combinations to a period frequency using this window then they will not be available for inventory replenishment functionality.

4.1 Setting Up Items and Sites for Demand Recording

To set up items and sites for demand recording using the Inventory Replenishment Setup window:

1. From the drop-down menu select a period frequency. You can select from calendar monthly, four weekly or weekly.

This is the frequency with which demand will be reviewed.

Note that you can only assign period frequencies to item / site combinations that are not currently assigned to a period frequency.

2. All item numbers, generic descriptions, class IDs and site IDs will be selected by default. Accept these selections or click the From buttons and enter range values or select them using the lookups.
3. Click Preview. All item / site combinations in the selected range will be displayed in the scrolling window.
4. Click Apply to enable inventory replenishment functionality for selected items / sites, based on the selected period frequency. A dialogue box will ask you to confirm that you want to apply inventory processing functionality to the selected items.
5. Click OK to close the window.

5. Calculation Methods Maintenance window

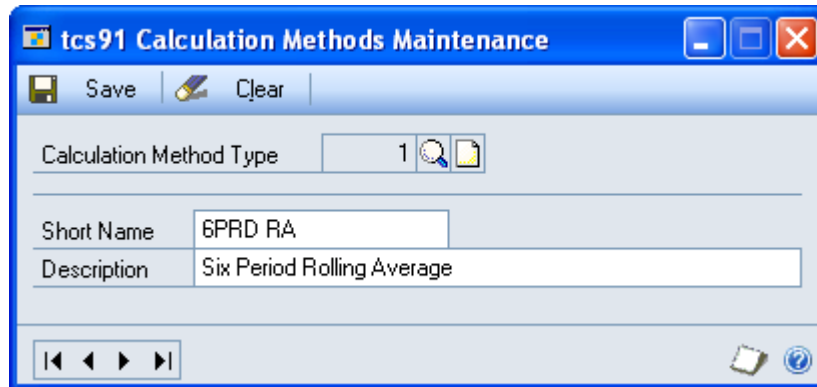


Tools >> Setup >> Myridas >> Inventory Replenishment >> Calculation Methods Maintenance

Use the Calculation Methods Maintenance window to:

- Manage calculation methods

The Calculation Methods Maintenance window



Note that prior to setting up any further inventory replenishment details you must open this window to enable demand of calculation types.

The calculation types are based on standard demand forecast calculation methods. For further details on calculation types see the white papers written by Jon Schreibfeder, available for download from the Microsoft website.

http://www.microsoft.com/BusinessSolutions/industry/wholesale_distribution_whitepapers.aspx

5.1 Managing Calculation Methods

To manage calculation methods using the Calculation Methods Maintenance window:

1. Use the lookup to select a calculation method type.
2. Amend the short name and description as required.
3. Click Save and close the window.

6. Calculation Demand Periods Assign window



Tools >> Setup >> Myridas >> Inventory Replenishment >> Number Periods Accuracy

Use the Calculation Demand Periods Assign window to:

- Set up the number of demand periods to use in calculations for a range of items

The Calculation Demand Periods Assign window

No of Demand Periods to use in Calculations: 12

Apply to the following range of Items and Sites:

Item Number: All From: 128 SDRAM To: 3-A2998A

Generic Description: All From: To:

Class ID: All From: To:

Site ID: All From: WAREHOUSE To: WAREHOUSE

Item Number	Site ID	Generic Desc	Class ID
Item Description			
128 SDRAM	WAREHOUSE	RAM	CATALOG
1GPROC	WAREHOUSE		RM-ACT
2" SASH BRUSH	WAREHOUSE		
2"VARNISH BRUSH	WAREHOUSE		
2-A3284A	WAREHOUSE	Servers	SERVERS-:
24X IDE	WAREHOUSE	CD ROM	

Buttons: Preview, Apply, OK

6.1 Setting Up the number of demand periods to use in calculations for a range of items

To set up the number of demand periods to use in calculations using the Inventory Replenishment Demand Periods Assign window:

1. Enter the Number of Demand Periods to use in Calculations. This defines how many periods to read when calculating the average difference between calculation methods in the [Demand Review - Calculation Method Analysis window](#).
2. All item numbers, generic descriptions, class IDs and site IDs will be selected by default. Accept these selections or click the From buttons and enter range values or select them using the lookups.
3. Click Preview. All item / site combinations in the selected range will be displayed in the scrolling window.
4. Click Apply to assign the specified number of demand periods to the item/site combinations in the selected range.
5. Click OK to close the window.

7. Target Order U of M Assign window



Tools >> Setup >> Myridas >> Inventory Replenishment >> Assign Target UofM

Use the Target Order U of M Assign window to:

- Set up Target Order Unit of Measure for a range of items

The Target Order U of M Assign window

Set Target Order U of M to: Base UOM Sales UOM Purchasing UOM

The Unit of Measure will be applied to the following range of Items:

Item Number All From: 128 SDRAM To: 24X IDE

Generic Description All From: To:

Class ID All From: To:

Item Number	Vendor ID	Generic Desc	Class ID
Item Description			
128 SDRAM	ACETRAVE0001	RAM	CATALOG
128 SDRAM	INTC-WAREHOU	RAM	CATALOG
1GPROC	ACETRAVE0001		RM-ACT
1GPROC	ADVANCED0001		RM-ACT
1GPROC	AMERICAN0001		RM-ACT
24X IDE	ACETRAVE0001	CD ROM	

Preview Apply OK

7.1 Setting Up the Target Order Unit of Measure for a range of items

To set up the Target Order Unit of Measure using the Inventory Replenishment Target Order U of M Assign window:

1. Select to set the Target Order Unit of Measure to Base UOM (base unit of measure), Sales UOM (default selling unit for the item) or Purchase UOM (default purchasing unit for the item). This is the unit of measure that the target order quantity will be calculated in when generating purchase orders using the Generate Suggested Purchase Orders window.
2. All item numbers, generic descriptions and class IDs will be selected by default. Accept these selections or click the From buttons and enter range values or select them using the lookups.
3. Click Preview. All item / creditor combinations in the selected range will be displayed in the scrolling window.
4. Click Apply to assign the specified target order unit of measure to the items in the selected range.
5. Click OK to close the window.

Cards

8. Item / Site Range Allocation window



Cards >> Myridas >> Inventory Replenishment >> Item/Site Range Allocation

Use the Item / Site Range Allocation window to:

- Assign calculation methods and stock details to ranges of items

*The Item / Site
Range
Allocation
window*

Item Number	Site ID	Calculation Method	Min Days Stock	Rank	Class ID	Order Up To
1-A3261A	WAREHOUSE	6PRD RA	14			28
180 MHz Processor				×	SERVERS-	Servers
1-A3483A	WAREHOUSE	6PRD RA	14			28
256MG SIMM Fr K Series				×	MEMORY-1	Memory
100KLG	WAREHOUSE	6PRD RA	14			28
Green Phone				B		Phone

8.1 Assigning Calculation Methods and Stock Details to Ranges of Items

To assign calculation methods and stock details to ranges of items using the Item / Site Range Allocation window:

1. Enter a calculation method type or select one using the lookup.

Alternatively if you do not want to enter a calculation method type then click the checkbox to deselect it.

2. Enter the minimum days stock to be held for the items in the range.

Alternatively if you do not want to enter a minimum days stock then click the checkbox to deselect it.

3. Enter the order up to days for the items in the range.

Alternatively if you do not want to enter an order up to days then click the checkbox to deselect it.

4. All item numbers, generic descriptions, class IDs, site IDs and item ranks will be selected by default. Accept these selections or click From and enter range values or select them using the lookups / drop-down menus.
5. There are now three further options to further restrict your range criteria.

For calculation method type, minimum days stock and order up to days you can select from the following options:

Unassigned	Only records not currently assigned will be included.
Any	All records will be included.
Specified	Enter or select criteria. Only records currently assigned to these criteria will be included.

6. Click Preview to display the selected range in the scrolling window.
7. Click Apply to apply the entered details to the selected range. A dialogue box will ask if you are sure you want to make this selection. Click Yes.
8. Click OK to close the window.

9. Item / Site Inventory Replenishment Maintenance window



Cards >> Myridas >> Inventory Replenishment >> Item/Site Maintenance

Use the Item / Site Inventory Replenishment Maintenance window:

- Assign inventory replenishment details to item / site combinations

*The Item / Site
Inventory
Replenishment
Maintenance
window*

9.1 Assigning Inventory Replenishment Details to Item / Site Combinations

To assign inventory replenishment details to item / site combinations using the Item / Site Inventory Replenishment Maintenance window:

1. Enter an item number or select one using the lookup.
2. Enter a site ID or select one using the lookup or browse buttons.
3. Current inventory replenishment details for the selected item / site combination will be displayed. With the exception of the Period Frequency all these details can be amended as required.

Calculation Method Type	The method used for calculating inventory replenishment.
Current Period Demand	The quantity demand for the current period. Enter a quantity.
Item Ranking	The ranking for the item compared to sales

	of other items from the same site over the same period.
Number of Periods to use in Forecast Accuracy Calculation	Defines how many periods to read when calculating the average difference between calculation methods in the Demand Review - Calculation Method Analysis window .

4. If required click to deselect the Allow Item Rank Wizard to Adjust Rank option. This will stop adjustments to the items ranking been made through the [Inventory Replenishment - Item Ranking Wizard](#).
5. Click Save then close the window.

*Deleting item / site
inventory
replenishment details*

Click Delete to delete any item / site inventory replenishment details.

Note that you can click Clear at any point to close the window.

10. Line Point Maintenance window



Cards >> Myridas >> Inventory Replenishment >> Line Point Maintenance

Use the Line Point Maintenance window to:

- Calculate line point quantities

The Line Point Maintenance window

The screenshot shows the 'tcs91 Line Point Maintenance' window. The main data fields are:

- Site ID: WAREHOUSE
- Main Site: Main Site
- Creditor ID: ATTRACT100001 (checked as Primary Creditor ID)
- Creditor Name: Attractive Telephone Co.
- Creditor Item Number: PREST-W126
- Item Description: Phone Shoulder Rest - Deluxe White

Calculation boxes on the right side of the window show the following formulas and results:

- Safety Stock:** Current Weekly Demand (0) * Minimum Weeks Stock (2.000) = 0
- Order Point:** Minimum Weeks Stock (2.000) + Creditor Lead Time (Weeks) (0.429) * Current Weekly Demand (0) = 0
- Order Up To Level:** Order Up To Weeks (4.000) * Current Weekly Demand (0) = 0
- Line Point:** Minimum Weeks Stock (2.000) + Creditor Lead Time (Weeks) (0.429) + Creditor Period Frequency (0.000) * Current Weekly Demand (0) = 0

10.1 Calculating Line Point Quantities

To calculate line point quantities in the Line Point Maintenance window:

1. Enter a site ID or select one using the lookup.
2. Enter a creditor ID or select one using the lookup.
3. Enter a creditor item number or select one using the lookup.

If the selected creditor is the primary creditor for the item then the Primary Creditor checkbox will be marked. Values calculated in the window can only be saved if the selected creditor is the primary creditor for the selected item.

However you can still use the link buttons for most fields to save any required values in alternate windows.

Creditor Period Frequency	The standard frequency with which you order from a supplier. Set in the Vendor Pricing - Extra Details window.
Current Weekly Demand	The weekly sales of the item. Based on the current period demand set in the Item / Site Inventory Replenishment Maintenance window or as updated by through the Demand Review window .
Creditor Lead Time (Weeks)	The planning lead time set in the Item Creditors Maintenance window.

4. Enter the minimum days to hold stock and the number of days stock to order up to. These can be re-entered and recalculated as many times as required.
5. Click the Recalculate button. Quantity details will be recalculated and displayed.

The safety stock, order point and order up to level can all be maintained through the Item Resource Planning window.

The line point quantity is used as an alternative trigger to the order point quantity in Purchase Order Generator.

6. If you have selected a primary creditor then you can click Save. Otherwise close the window.

Deleting line point details

Note that you can click Delete to delete minimum days stock and order up to days for the displayed site ID / creditor ID / creditor item number.

Routines

11.1 Inventory Replenishment - Item Ranking Wizard



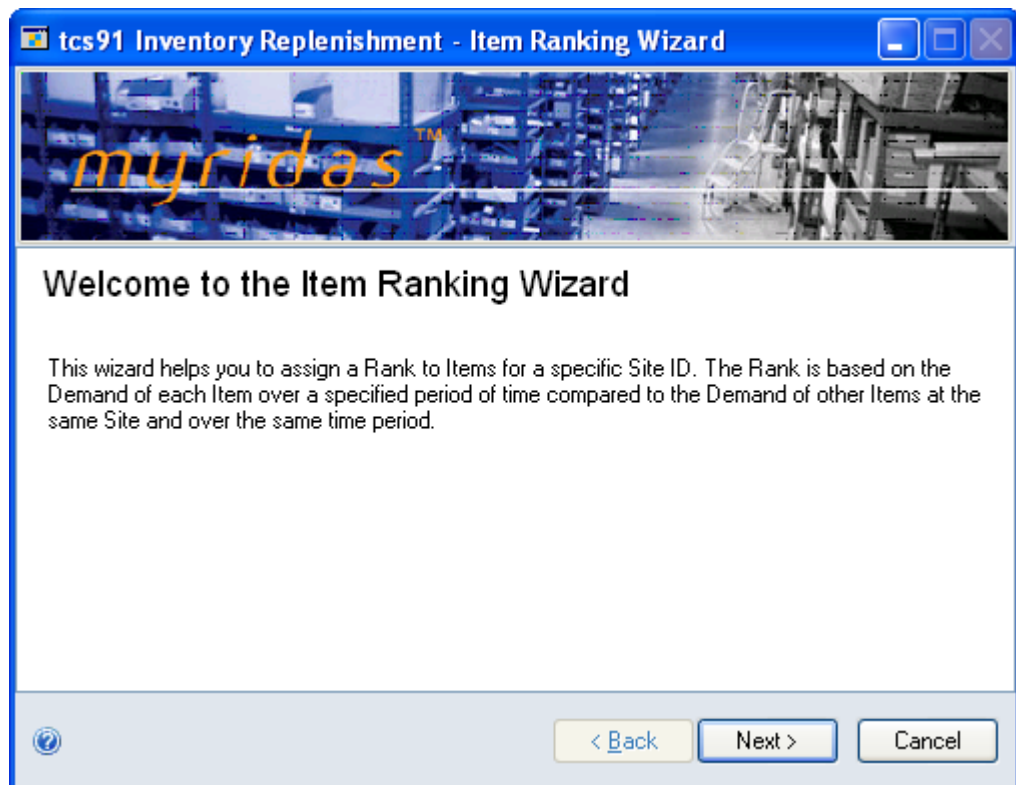
Tools >> Routines >> Myridas >> Inventory Replenishment >> Item Ranking wizard

The Inventory Replenishment - Item Ranking wizard allows the user to assign ranks to items. An item rank is based on the demand for each item over a specific period of time, compared to the demand for other items on the site over the same period of time.

Use the Inventory Replenishment - Item Ranking Wizard to:

- Assign ranks to items

*The Inventory
Replenishment -
Item Ranking
Wizard*



11.1.1 Using the Inventory Replenishment - Item Ranking Wizard

1. Click the Next button to display the next window.

Note that you can click Cancel on this or any other Inventory Replenishment - Item Ranking Wizard screen to close the Wizard.

Note also that you can click the Back button on any other Inventory Replenishment - Item Ranking Wizard screen to return to the previous screen.

11.2 Item Ranking - Site ID screen

The Item Ranking - Site ID screen




The screenshot shows a software window titled "tcs91 Inventory Replenishment - Item Ranking Wizard". The window has a blue header bar with the title and standard window control buttons (minimize, maximize, close). Below the header, the text "Item Ranking - Site ID" is displayed on the left, and the "myridas" logo is on the right. The main content area contains the instruction "Select the Site ID to perform the Item Ranking on:" followed by a dropdown menu labeled "Site ID" with "WAREHOUSE" selected. At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel".

11.2.1 Using the Item Ranking - Site ID screen

1. Select a site ID from the drop-down menu.
2. Click the Next button to display the next screen.

11.3 Item Ranking - Date Range screen

The Item Ranking - Date Range screen



tcs91 Inventory Replenishment - Item Ranking Wizard

Item Ranking - Date Range *myridas*TM

Select a Start and End Date within which to check Item Demand:

Start Date

End Date

< Back Next > Cancel

11.3.1 Using the Item Ranking - Date Range screen

1. Enter a start date for when item demand should be checked.
2. Enter an end date for when item demand should be checked.
3. Click the Next button to display the next screen.

11.4 Item Ranking - Breakpoints screen

The Item Ranking - Breakpoints window

The screenshot shows a software window titled "tcs91 Inventory Replenishment - Item Ranking Wizard". The main heading is "Item Ranking - Breakpoints" with the "myridas" logo. Below the heading, a text instruction reads: "You must establish the percentage breakpoints, based on Volume of Sales, that will be used to group your Items when assigning a Rank:". A table lists five breakpoints with their respective percentages. At the bottom, there are three buttons: "< Back", "Preview", and "Cancel".

Breakpoint A:	80%
Breakpoint B:	15%
Breakpoint C:	4%
Breakpoint D:	1%
Breakpoint X:	0% (Excluded)

11.4.1 Using the Item Ranking - Breakpoints screen

1. This screen enables you to select how your items will be ranked. For each breakpoint you should accept the default settings or enter new settings as required.

The percentages are based on sales transaction quantities. For example, if you have 80% as Breakpoint A and 15% as Breakpoint B then the fastest moving 80% of your stock would achieve Rank A, the next 15% would achieve Rank B and so on.

2. Click the Preview button to display the next screen.

11.5 Item Ranking - Preview screen

The Item Ranking - Preview screen

Item Number	Num Transactions	Curr Rank	Sugg Rank	Adjust
100KLG	23	A	A	<input checked="" type="checkbox"/>
128 SDRAM	11	D	D	<input checked="" type="checkbox"/>
24X IDE	33	A	A	<input checked="" type="checkbox"/>
256 SDRAM	0	X	X	<input checked="" type="checkbox"/>
32 SDRAM	0	X	X	<input checked="" type="checkbox"/>
X 32X IDE	6	B	B	<input type="checkbox"/>
333PROC	0	X	X	<input checked="" type="checkbox"/>
4.5HD	0	X	X	<input checked="" type="checkbox"/>
400PROC	0	X	X	<input checked="" type="checkbox"/>
40X IDE	1	C	C	<input checked="" type="checkbox"/>

11.5.1 Using the Item Ranking - Preview screen

1. All items for the selected site will be displayed in the scrolling window with the number of transactions they appeared on in the selected date range, their current ranking and their suggested ranking.



Note that if you have selected to not allow the item wizard to update an item in the [Item / Site Inventory Replenishment Maintenance window](#) then it will be denoted with a red cross and you will be unable to select it for adjustment.

2. You can select alternate suggested ranks from the drop-down menu as required.

3. All lines will be selected for Adjust by default. You can click on the Adjust checkbox for individual items to select / deselect them, or use the Mark All / Unmark All buttons.

Items selected for Adjust will be updated to the Suggested Rank.

4. Click the Preview button to display the next screen.

11.6 Item Ranking - Completing screen

The Item Ranking - Completing screen

tcs91 Inventory Replenishment - Item Ranking Wizard


myridas

Completing the Item Ranking Wizard

You have selected to adjust the Item Rank for Item Numbers at:

Site ID

Based on Item Demand from to

 When you choose Finish, the selected Item Numbers' Ranks will be adjusted.

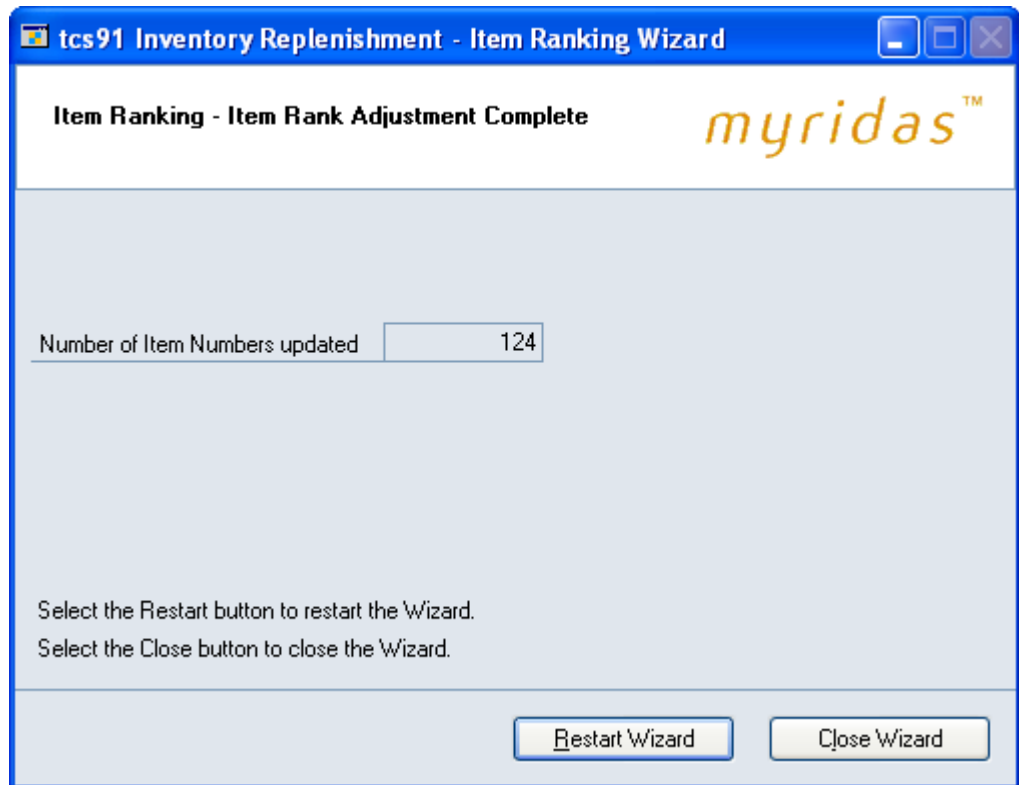
< Back Finish Cancel

11.6.1 Using the Item Ranking - Completing screen

1. The selected site ID and date range are displayed.
2. Click Finish to update selected item rankings.

11.7 Item Ranking - Completed screen

The Item Ranking - Completed screen



11.7.1 Using the Item Ranking - Completing screen

1. The number of items with item rankings updated will be displayed.
2. Click Restart Wizard to update more item rankings or Close Wizard to close the wizard.

12. Demand Review window



Tools >> Routines >> Myridas >> Inventory Replenishment >> Demand Review

Use the Demand Review window to:

- Review demand figures

The Demand Review window

Item Number	-6	-5	-4	-3	-2	-1	Current EPD	Calculation Method	Fore
100XLG	0	0	0	0	0	9	2	6PRD RA	
ACCS-CRD...	0	0	0	11	13	6	5	6PRD RA	
ACCS-CRD...	0	0	0	2	0	3	1	6PRD RA	
ACCS-HDS...	0	0	0	0	0	13	2	6PRD RA	
ACCS-RST...	0	0	0	3	0	39	7	6PRD RA	
ACCS-RST...	0	0	0	5	0	21	4	6PRD RA	
ANSW-ATT...	0	0	0	3	1	0	1	6PRD RA	
ANSW-PA...	0	0	0	1	0	17	3	6PRD RA	
ANSW-PA...	0	0	0	2	0	0	0	6PRD RA	
FAXX-CAN...	0	0	0	10	11	23	7	6PRD RA	
FAXX-RIC...	0	0	0	1	0	2	1	6PRD RA	
FAXX-SLK...	0	0	0	1	0	0	0	6PRD RA	
HDWR-AC...	0	0	0	0	0	0	0	6PRD RA	
HDWR-CA...	0	0	0	0	0	3	1	6PRD RA	
HDWR-CI...	0	0	0	0	0	0	0	6PRD RA	
HDWR-PNL...	0	0	0	6	0	2	1	6PRD RA	
HDWR-PR...	0	0	0	2	0	0	0	6PRD RA	
HDWR-PR...	0	0	0	1	0	0	0	6PRD RA	
HDWR-RM	0	0	0	0	0	9	2	6PRD RA	

12.1 Reviewing Demand Figures

To review demand figures in the Demand Review window:

1. All sites, creditors and calculation methods will be selected by default. Accept these settings or click the Specific button and enter or select specific details to review.
2. All item ranks will be selected by default. You can choose to view items from a specific item rank only by selecting from the drop-down menu.
3. For the Only show items with a forecast variance greater or equal to option you can enter a percentage figure. Only items with a forecast variance greater or equal to the entered percentage will be displayed in the scrolling window.
4. Click the Only show un-reviewed Items option to only display items that have not yet been reviewed in the Manual Demand Adjustment window.

Note that any setting selections made will be selected by default the next time the Demand Review window is selected.

5. Click Redisplay. All items meeting the selected criteria will be displayed in the scrolling window.

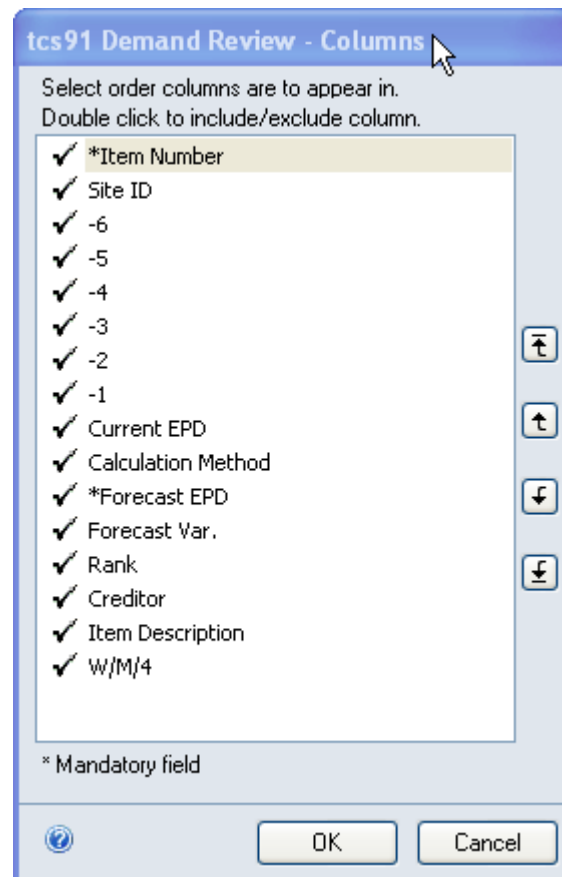
Items will be displayed with their primary creditor ID, calculation method, item rank, the previous 6 months demand figure and the current and forecast estimated period demand and their variance. The forecast EPD is the monthly average of the last six months demand of an item / site.

Click on a column to redisplay scrolling window details into alphanumeric order based on that column.



Note that you can also click the Maintain List View Columns button to display the Demand Review - Columns window. Double click on a line in this window to deselect it from being displayed in the Demand Review window, or use the arrow buttons to change the ordering of the columns. Note that the Demand Review window will not reflect changes until you click the Redisplay button.

The Demand Review - Columns window



You can also hide the Demand Review filters and so display more item details by clicking the Hide Filters button.



6. You can view and amend your calculation method selection for an item by clicking the Calculation Method Analysis button to display the Demand Review - Calculation Method Analysis window.

The Demand Review - Calculation Method Analysis window

tcs91 Demand Review - Calculation Method Analysis

Item Number	32X IDE
Site ID	32x CD-ROM WAREHOUSE Main Site

Calculation Method	Difference
*Six Period Rolling Average	0.00%
Six Period Rolling Average w/4 Trend	0.00%
Three Period Rolling Average	0.00%
Three Period Rolling Average w/4 Trend	0.00%
Year Ago Upcoming Three Periods	0.00%
Weighted Std 3.0/2.5/2.0/1.5/1.0	0.00%
Weighted Std 3.0/2.5/2.0/1.5/1.0 + Trend	0.00%
Weighted Std 5.0/2.0/1.0	0.00%
Weighted Sea 2.0/1.0	0.00%
Weighted Std 2.0/1.0 + Sea Trend	0.00%
Weighted Sea 1.0/1.0/1.0 + Sea Trend	0.00%
Weighted Sea 1.0 + Sea Trend	0.00%
Weighted Sea 4.0/1.0 + Sea Trend	0.00%

* Denotes Item/Site's default Calculation Method.

Update Calc. Method OK

This window analyses calculation methods and displays the most accurate by percentage.

The current default calculation method for the item / site will denoted with a *.

To select a new calculation method for the item / site click on a line and click the Update Calc Method button. The selected calculation method will automatically be assigned. Generally you would want to select the calculation method with the least Difference.

Click the Print icon button to print the Calculation Analysis report.

Note that you can click OK at any point to close the window.



- You can maintain demand figures for items / sites by clicking the Maintain Demand Details button to display the Manual Demand Adjustment window.

Use the Manual Demand Adjustment window to maintain figures to establish an accurate forecast variance.



- You can click the Zoom To button to select to display a new window from the choice of several available windows.



9. You can click the Print Review button to produce a report comparing current and forecast estimated period demand.



10. You can click the Excel button to export the Demand Review information to a Microsoft Excel spreadsheet.

11. When you have reviewed details as required you can update the Current Estimated Period Demand with the Forecast Estimated Period Demand. The order point quantity, line point quantity and safety stock quantity for the primary creditor will also be updated.

Double click on a line to select / deselect it for update or use the Mark All / Unmark All buttons.

12. Click the Update button. A dialogue box will be displayed asking you to confirm that you want to update current period demand for the selected lines with the newly calculated estimated period demand. Click OK. Now click Redisplay in the Demand Review window and you will see that Current Estimated Period Demand is now the same as the Forecast Estimated Period Demand.

Note that when a line is updated its status will automatically be set the status of reviewed.

13. Manual Demand Adjustment window



Tools >> Routines >> Myridas >> Inventory Replenishment >> Maintain Demand Details

Use the Manual Demand Adjustment window to:

- Maintain item / site demand figures

The Manual Demand Adjustment window

Year	Period	Trxs.	Sales Quantity	Lost Sales	Exceptional	Actual Demand	Last Review	Reviewed
2007	Apr 07	2	6	2	0	8	12/04/2007	<input checked="" type="checkbox"/>
2006	Mar 06	2	6	2	0	8	12/04/2007	<input checked="" type="checkbox"/>
2006	Feb 06	7	13	0	3	10	12/04/2007	<input checked="" type="checkbox"/>
2006	Jan 06	3	11	0	0	11	03/06/2005	<input type="checkbox"/>
2006	Dec 06	0	0	0	0	0	12/04/2007	<input type="checkbox"/>
2006	Nov 06	0	0	0	0	0	12/04/2007	<input type="checkbox"/>
2006	Oct 06	0	0	0	0	0	12/04/2007	<input type="checkbox"/>
2006	Sep 06	0	0	0	0	0	12/04/2007	<input type="checkbox"/>
2006	Aug 06	0	0	0	0	0	12/04/2007	<input type="checkbox"/>
2006	Jul 06	0	0	0	0	0	12/04/2007	<input type="checkbox"/>

Note that this window can also be accessed through the [Demand Review window](#).

13.1 Maintaining Item / Site Demand Figures

To maintain item / site demand figures using the Manual Demand Adjustment window:

1. Enter an item number or select one using the lookup.
2. Enter a site ID or select one using the lookup or browse buttons.

Note that if you opened this window from the [Demand Review window](#) then the selected item number and site ID will be displayed by default.

3. Demand figures for the selected item / site will be displayed in the scrolling window.

You can enter details of Lost Sales and Exceptional Sales for each displayed time period in the scrolling window.

Lost Sales	Sales that were not made due to lack of stock, preferred alternative items, etc.
-------------------	--

Exceptional Sales	Sales that were exceptional to the regular sales trends. Sales can also be marked as exceptional in the Microsoft Dynamics™ GP Sales Item Detail Entry window.
--------------------------	--



Alternatively you can click to select a line then click the expansion button to display the Manual Demand Adjustment - Transactions window.

The Manual Demand Adjustment - Transactions window

Document Type	Document Number	Sales Quantity	Lost Sales	Exceptional	Actual Demand	Last Review
Invoice	STDINV2130	5	0	0	5	12/04/2007
Invoice	STDINV2135	3	0	0	3	03/06/2005
Invoice	STDINV2137	3	0	0	3	03/06/2005
Period Totals:		11	0	0	11	

This window shows item / site transactions and associated details for the selected period. You can enter details of Lost Sales and Exceptional Sales for each displayed transaction in the scrolling window.

Note that you can attach a note to a selected transaction by clicking the Note button at the top of the scrolling window.

Also note that the demand figures in this window may, for various factors, differ from those in the Manual Demand Adjustment window.

Click OK to return Manual Demand Adjustment window. Any lost or exceptional sales quantities you entered against lines will be displayed against the relevant period.

4. Click the Reviewed checkbox for lines that you want to mark as having been reviewed or use the Mark All / Unmark All buttons to mark / unmark all lines as having been reviewed.

When you work in the Demand Review window you can select to only view lines that have not yet been reviewed.

5. Click Update to update item Actual Demand figures with any lost or exceptional sales details that you have entered.

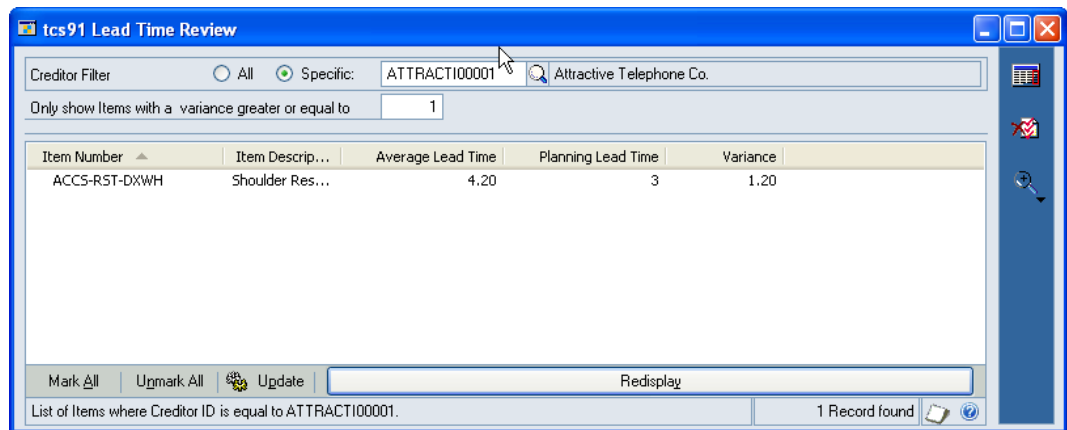
14. Lead Time Review Window



Tools >> Routines >> Myridas >> Inventory Replenishment >> Lead Time Review

Use the Lead Time Review window to:

- Compare average and planning lead times for a supplier
- Update the planning lead time from the average lead time



14.1 Reviewing Lead Times

To review Lead Times using the Lead Time Review window:

1. Choose whether to review lead times for a specific creditor or all creditors.
2. If reviewing lead times for a specific creditor, enter a creditor id or select one using the lookup.
3. Enter a variance. Items will be displayed if the difference between average and planning lead times exceeds the variance.
4. Press Redisplay to display the relevant items.
5. Double click an item to mark it for update, or select Mark All to update all items.
6. Press Update to set the planning lead time from the average lead time.



Note that you can also click the Maintain List View Columns button to display the Lead Time Review - Columns window. Double click on a line in this window to deselect it from being displayed in the Lead Time Review window, or use the arrow buttons to change the ordering of the columns. Note that the Lead Time Review window will not reflect changes until you click the Redisplay button.



You can hide the Lead Time Review filters and so display more item details by clicking the Hide Filters button.



You can click the Zoom To button to display the Item Maintenance or Creditor Item Maintenance window.

Transactions

15. Automatically Generated Purchase Orders

The Microsoft Dynamics™ GP Generate Suggested Purchase Orders window includes functionality for the Advanced Inventory Replenishment module.

A new Use Line Point Suggestions field enables you to include suggested quantities triggered by the line point quantity as well as the order point quantity.

15.1 Vendor Totals window

When you click the Suggest Purchase Orders button the Suggested Purchase Orders Preview window is displayed. The Vendor Totals window is also displayed. See the Myridas Vendor Price Management module for further details.

The Vendor Totals window

ⓘ Creditor ID	Target Order Qty	Total Volume	Difference	Minimum Order Value	Total Cost
ⓘ ADVANCED0001	10	10	0	\$100.00	\$4632.00
BERGERON0001	30	40	10	\$500.00	\$1,198.50

Include Order Point Include Line Point Add Weekly Demand

Items / sites for creditors that were triggered by the order point quantity rather than the line point quantity will be denoted with an ⓘ symbol. These lines will have the Include checkbox selected by default in the Suggested Purchase Orders Preview window.

Items / sites for creditors that were triggered by the line point quantity will not be marked with the ⓘ symbol and will not have the Include checkbox selected by default in the Suggested Purchase Orders Preview window.

Three buttons on the window give you additional functionality.

Include Order Point	Select a creditor then click this button. All items / sites for the creditor with an order point quantity of greater than 0 will have the Include checkbox selected in the Suggested Purchase Orders Preview window.
Include Line Point	Select a creditor then click this button. All items / sites for the creditor with a quantity of greater than 0 triggered by the line point will have the Include checkbox selected in the Suggested Purchase Orders Preview window.
Add Weekly Demand	All items for the selected creditor that have the Include checkbox ticked and are set up for inventory

replenishment will have the current weekly demand added to the Order Qty field in the Suggested Purchase Orders Preview window.

15.2 Line Point Quantity Visibility



Standard Microsoft Dynamics™ GP functionality allows you to click the Item Number expansion button in the Suggested Purchase Orders Preview window to display the Suggested Purchase Order Detail window. Clicking the Required Qty in Base U of M expansion button displays the Required Quantity Detail window.

The Required Quantity Detail window

The window has been amended to include the Line Point Qty. Click the Line Point Qty expansion button and a further new window is displayed, showing breakdown details of the line point quantity for the selected item / site.

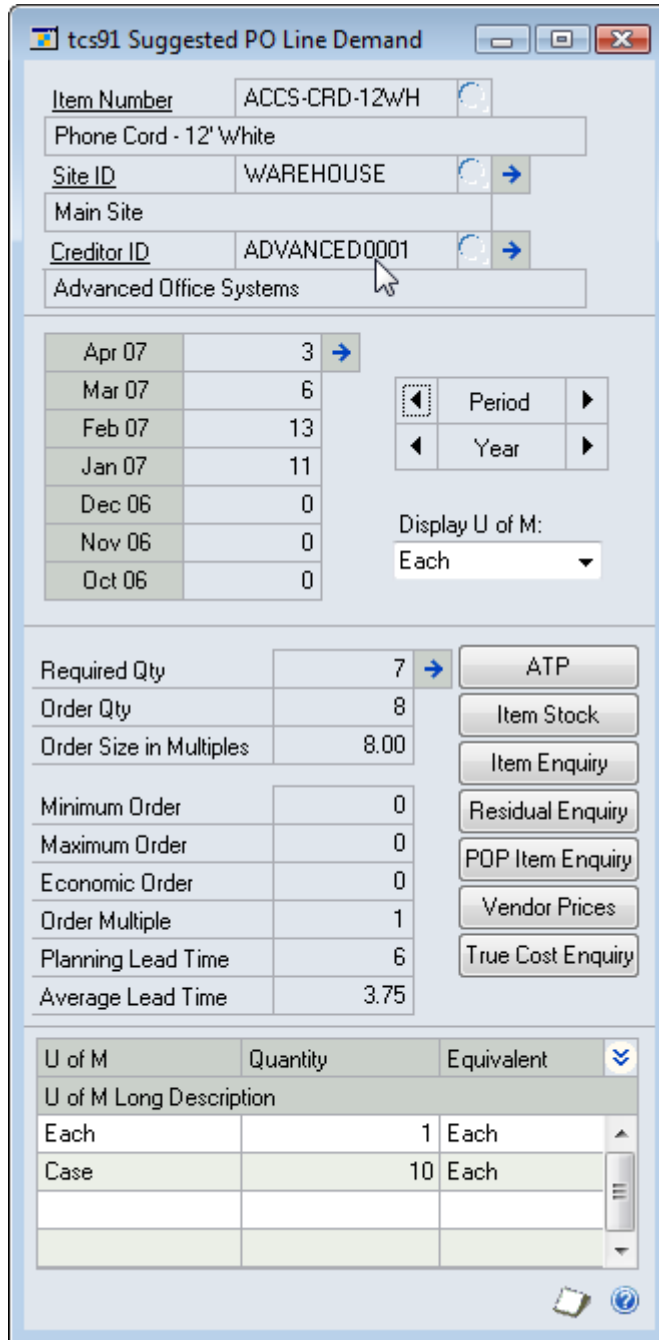
The Line Point Breakdown window

15.3 Suggested PO Line Demand window

If the option to Pop-Up Line Demand Enquiry in Purchase Order Generator has been ticked in the [Inventory Replenishment Setup window](#), the Suggested PO Line Demand window will appear when the Suggested Purchase Orders Preview window is displayed.

This window is also available from the Suggested Purchase Orders Preview window by selecting Extras>>Additional>>Line Demand Enquiry.

The Suggested PO Line Demand window



As each line is selected in the Suggested Purchase Order Preview window, additional details about the item and its suggested order quantity will be displayed

in the Suggested PO Line Demand window. These details include demand history, Item Resource Planning information, lead times and units of measure, with buttons to open further enquiry windows.

The current period and previous six periods demand will be displayed by default. Use the Year and Period browse buttons to view other periods.

Enquiries

16. Inventory Replenishment Enquiry window



Card >> Inventory >> Item Resource Planning >> Extras >> Additional >> Inventory Replenishment

Use the Inventory Replenishment Enquiry window to:

- View inventory replenishment information for items / sites

The Inventory Replenishment Enquiry window

Item Number	ACCS-RST-DXWH	
	Shoulder Rest - Deluxe White	
Site ID	WAREHOUSE	
	Main Site	
Order Up To Days	14	Estimated Weekly Demand 0
Minimum Days	28	

16.1 Viewing Inventory Replenishment Information for Items / Sites

To view inventory replenishment information for items / sites using the Inventory Replenishment Enquiry window:

1. Order Up To Days, Minimum Days, and Estimated Weekly Demand for the item / site selected in the Item Resource Planning window will be displayed.
2. Click OK to close the window.

17. Item Residual Enquiry window



Suggested Purchase Orders Preview >> Extras >> Additional >> Line Demand Enquiry >> Residual Enquiry button

Use the Item Residual Enquiry window to:

- View residual inventory history

*The Item
Residual
Enquiry window*

Receipt Date	Receipt Number	Qty On Hand	Qty Allocated
19/04/2007	RCT1176	10.00	12.00
12/04/2007	RCT1175	12.00	17.00

17.1 Viewing Residual Inventory

To view residual inventory using the Item Residual Enquiry window:

1. Click the Residual Enquiry button on the Suggested PO Line Demand window. The Item Residual Enquiry will open with the Item Number and Site populated.
2. In the scrolling window, the history of receipts for the selected Item and Site will be displayed. Receipt date and receipt number will be shown, and the Quantity On Hand and Quantity Allocated at the time of the receipt will be displayed.
3. Click OK to close the window.

Reports

18. Calculation Method Analysis Report window



Reports >> Myridas >> Inventory Replenishment >> Calculation Methods Analysis

Use the Calculation Method Analysis Report window to:

- Report on calculation methods

The Calculation Method Analysis Report window

18.1 Reporting on Calculation Methods

To report on calculation methods using the Calculation Method Analysis Report window:

1. All item numbers will be selected by default. Accept this selection or click From and enter range values.
2. All site IDs will be selected by default. Accept this selection or click From and enter range values.
3. Select a calculation method option:

Show All	Reports on all calculation methods
Show Best	Reports on only the best calculation methods
Only when change recommended	Reports on only those calculation methods where change is recommended



4. From the Only include Item's that have a Rank of drop-down menu select whether to report on items of all ranks or only those of a specified rank.
5. Click Print to print the Calculation Method Analysis report.
6. Click OK to close the window.

Note that you can click Clear at any point to clear any entries made in the window.

Appendix A

Access to Myridas Windows

Advanced Inventory Replenishment

Window Name	 Menu Access	 Other Access
Calculation Demand Periods Assign	Tools >> Setup >> Myridas >> Inventory Replenishment >> Number Periods Accuracy	
Calculation Method Analysis Report	Reports >> Myridas >> Inventory Replenishment >> Calculation Methods Analysis	
Calculation Methods Maintenance	Tools >> Setup >> Myridas >> Inventory Replenishment >> Calculation Methods Maintenance	
Calendar Maintenance	Tools >> Setup >> Myridas >> Inventory Replenishment >> Calendar Maintenance	
Demand Review	Tools >> Routines >> Myridas >> Inventory Replenishment >> Demand Review	
Demand Review - Calculation Method Analysis		Tools >> Routines >> Myridas >> Inventory Replenishment >> Demand Review >> Calculation Method Analysis button
Demand Review - Columns		Tools >> Routines >> Myridas >> Inventory Replenishment >> Demand Review >> Maintain List View Columns button
Inventory	Tools >> Routines >>	

Replenishment - Item Ranking Wizard	Myridas >> Inventory Replenishment >> Item Ranking wizard	
Inventory Replenishment Enquiry		Card >> Inventory >> Item Resource Planning >> Extras >> Additional >> Inventory Replenishment
Inventory Replenishment Setup	Tools >> Setup >> Myridas >> Inventory Replenishment >> Setup	
Inventory Replenishment Setup Wizard	Tools >> Setup >> Myridas >> Inventory Replenishment >> New Installation Setup Wizard	
Inventory Replenishment Period Frequency Setup	Tools >> Setup >> Myridas >> Inventory Replenishment >> Period Frequency Setup	
Item / Site Inventory Replenishment Maintenance	Cards >> Myridas >> Inventory Replenishment >> Item/Site Maintenance	
Item / Site Range Allocation	Cards >> Myridas >> Inventory Replenishment >> Item/Site Range Allocation	
Lead Time Review	Tools >> Routines >> Myridas >> Inventory Replenishment >> Lead Time Review	
Line Point Breakdown		Transactions >> Purchasing >> Purchase Order Generator >> Suggest Purchase Orders button >> Item Number expansion button >> Required Qty in Base U of M button >> Line Point Qty expansion button

Line Point Maintenance	Cards >> Myridas >> Inventory Replenishment >> Line Point Maintenance	
Manual Demand Adjustment	Tools >> Routines >> Myridas >> Inventory Replenishment >> Maintain Demand Details	Tools >> Routines >> Myridas >> Inventory Replenishment >> Demand Review >> Maintain Demand Details button
Manual Demand Adjustment - Transactions		Tools >> Routines >> Myridas >> Inventory Replenishment >> Demand Review >> Maintain Demand Details button >> Expansion button
Target Order U of M Assign	Tools >> Setup >> Myridas >> Inventory Replenishment >> Assign Target U of M	

Appendix B

Alternate Microsoft Dynamics™ GP Windows

Some Microsoft Dynamics™ GP windows have been modified to incorporate Myridas behaviour:

Window Name	Series	Myridas Module	Modification
Generate Suggested Purchase Orders window	Purchasing	Advanced Inventory Replenishment	New Use Line Point Suggestions field to enable line point quantities to be used as a basis for automatically generated purchase orders.
Required Quantity Detail window	Purchasing	Advanced Inventory Replenishment	The window has been amended to include a new Line Point Qty field. Click the Line Point Qty expansion button and a further new window is displayed, showing breakdown details of the line point quantity for the selected item / site.

Appendix C

Modified Myridas Windows with additional modules

Some Myridas windows will have additional functionality when used in conjunction with other Myridas modules:

Myridas Window Name	Module	Additional Myridas Module	Modification
Vendor Pricing - Extra Details window	Vendor Price Management	Advanced Inventory Replenishment	A new Period Frequency (weeks) button to enter order period frequency for the creditor.
Vendor Totals window	Vendor Price Management	Advanced Inventory Replenishment	New information icon displays that a line is based on order point quantity rather than line point quantity. New buttons enable quick inclusion of order lines.

Appendix D

Myridas Reports

Myridas provides reports to increase information visibility.

Report Name	Module	Functionality
Calculation Method Analysis Report	Advanced Inventory Replenishment	Prints calculation method analysis details

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