

INV-51 Schedule Min-Max Planning Report

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation on how to Schedule a Min-Max Planning Report in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers an explanation on how to schedule a min-max planning report in NCFS.

The Min-Max Planning report offers suggested replenishment order quantities based on current on-hand stock, min-max levels for the item, open orders out to a certain date, and incoming replenishment orders out to a certain date. Orders placed, changed, or cancelled, or orders which are outside of the defined dates, may cause suggested reorder quantity to be incorrect.

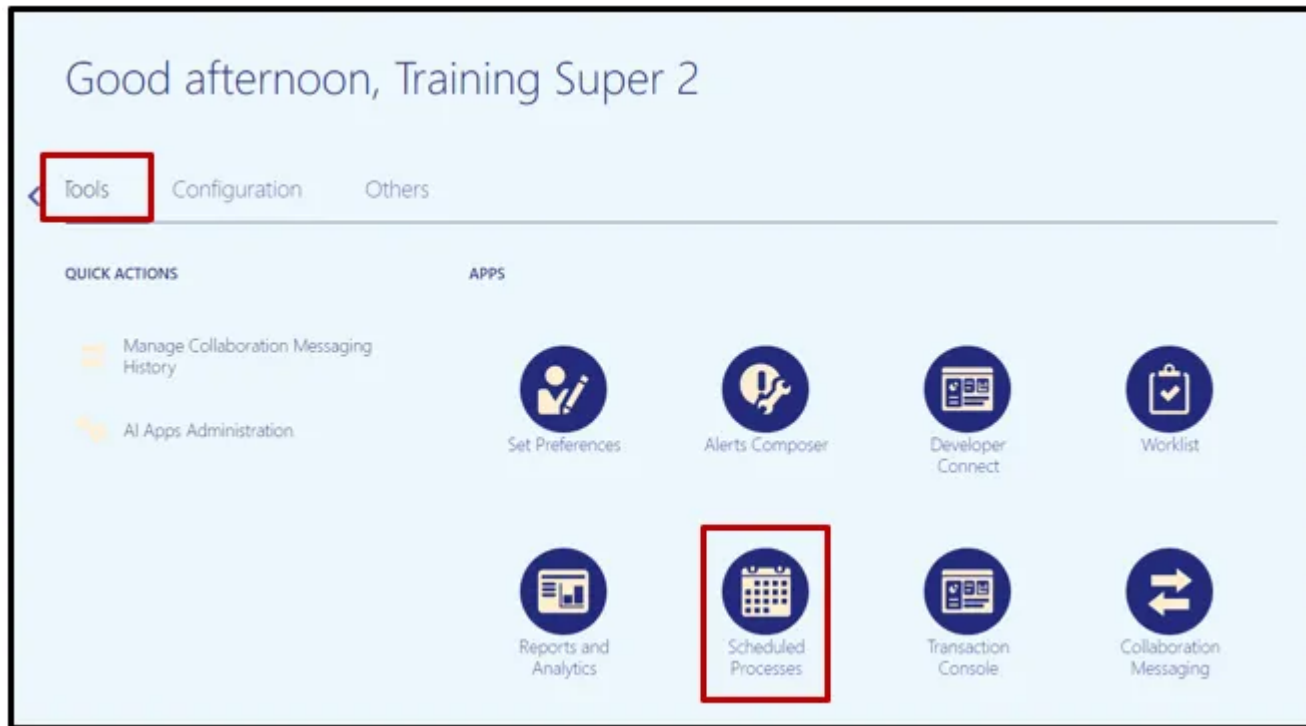
Schedule Min-Max Planning Report

To schedule a pick slip report in NCFS, please follow the steps below. There are 12 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

Step 2. On the **Home** page, under the **Tools** tab, click the **Scheduled Processes** app.

Image



Step 3. On the **Scheduled Processes** page, click **Scheduled New Process**.

Image

Overview ?

► Search

Search Results ?

View ☒ Flat List ☐ Hierarchy

Actions ▼ View ▼ **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log ↻

Name
Rebuild Learning Item Stop Word Index
Rebuild Learning Item Stop Word Index
Rebuild Learning Item Stop Word Index
Provide Online Transaction Engine Functionality

Step 4. Type “***Print Min-Max Planning Report***” in the **Name** field. Click **OK**.

Note: The **dash (-)** between Min and Max is **required**.

Image

Schedule New Process

Type ☒ Job ☐ Job Set

Name

Description Calculates min-max planning replenishment levels for items.

OK Cancel

Step 5. Notable fields and their descriptions are listed below.

In this example, Organization was set to 4210451, Sort by was set to Inventory Item, Planning Level was set to Organization, Item Selection was set to Items under minimum quantity, Demand Cutoff Date Offset was set to 15 days, Supply Cutoff Date Offset was set to 15 days, and all other fields were kept as the default.

- ***Organization** – Drop-Down List; Field to select the inventory organization
- ***Sort By** – Drop-Down List; Field to select report item sorting method
- ***Planning Level** – Drop-Down List; Field to select planning level
 - Note: Inventory Organizations are currently planned at the Organization level. Running the report with Subinventory set may not return any results.
- ***Item Selection** – Drop-Down List; Field to select which items to view

Supply and Demand Cutoff date fields let you choose a future date to base the report on. NCFS will use predicted stock levels at that future date to suggest reorder quantities. For example, today is 10/20, my item is below the minimum threshold but an already placed reorder quantity is due to arrive on 10/25. If I set my **Supply Cutoff Date** to 10/24, the Min-Max Planning Report will suggest I reorder more quantity, even though enough quantity

has already been ordered. Note that the further in the future you set these dates, the more likely an order will be cancelled or changed, and results will be incorrect.

- **Demand Cutoff Date** – Choice List; Field to select a specific date of predicted stock levels based on demand orders.
- **Demand Cutoff Date Offset** – Editable Field; Field to enter a number of days in the future to set the Demand Cutoff Date. If today is 10/20, and the Demand Cutoff Date Offset is set to 5, the report will set the Demand Cutoff Date to 10/25.
- **Supply Cutoff Date** – Choice List; Field to select a specific date of predicted stock levels based on incoming replenishment orders.
- **Supply Cutoff Date Offset** – Editable Field; Field to enter a number of dates in the future to set the Supply Cutoff Date.
- ***Restock** – Drop-Down List; Set this field to No. If you choose yes, incorrect and incomplete orders will be placed as NCFS does not support reordering by replenishment report causing incorrect stock levels in NCFS.
- ***Net Unreserved Orders** – Drop-Down List; Field to choose if report runs with stock levels based on unreserved orders.
- ***Include Interface Supply** – Drop-Down List; Field to choose if report runs with stock levels based on orders placed in interfaces (like eProcurement/Ariba).
- ***Net Reserved Orders** – Drop-Down List; Field to choose if report runs with stock levels based on reserved orders.
- ***Display Format** – Drop-Down List; Field to select the amount of information to be displayed.
- ***Display Item Description** – Drop-Down List; Field to add or remove item description from report.
- ***Include PO Supply** – Drop-Down List; Field to include or remove incoming replenishment from Purchase Orders from reporting calculations.
 - Note: Agencies DHHS and DAC do not use NCFS Purchase Orders for inventory ordering at this time.
- ***Include Movement Request Supply** – Drop-Down List; Field to include or remove Movement Request from reporting calculations.

Process Details

This process will be queued up for submission at position 1

Buttons: Process Options | Advanced | Submit | Cancel

Name: Print Min-Max Planning Report

Description: Calculates min-max planning replenishment level...

Schedule: As soon as possible

Submission Notes:

Basic Options

Parameters

- A * Organization: 4210451
- B * Sort By: Inventory item
- From Item:
- To Item:
- C * Planning Level: Organization
- D * Item Selection: Items under minimum quantity
- Subinventory:
- Batch Prefix:
- Lot Control: Include both lot and not lot controlled items
- E Demand Cutoff Date: m/d/yy
- F Demand Cutoff Date Offset: 15

Image

	Demand Cutoff Date Offset	15
G	Supply Cutoff Date	m/d/yy
H	Supply Cutoff Date Offset	15
I	* Restock	No
	Ship-to Location	
I	* Net Unreserved Orders	Yes
K	* Include Interface Supply	Yes
I	* Net Reserved Orders	Yes
	Include Nonnettable Subinventories	Yes
M	* Display Format	Display all information
N	* Display Item Description	Yes
O	* Include PO Supply	Yes

Image

* Include PO Supply	Yes	▼
From Category		▼
To Category		▼
From Buyer		▼
To Buyer		▼
From Planner		▼
To Planner		▼
Purchasing by Revision	No	▼
* Include Movement Request Supply	Yes	▼
Net WIP Demand	Yes	▼
Include WIP Supply	Yes	▼
Include Subinventories Without On-Hand Quantities	Yes	▼

Step 6. Switch to the Advanced view by clicking **Advanced**.

Note: for scheduled Min-Max Planning Reports, use the Demand Cutoff Date Offset and Supply Cutoff Date Offset fields.

Image

Process Details

×

This process will be queued up for submission at position 1

Process Options

Advanced

Submit

Cancel

Name

Print Min-Max Planning Report

☐

Print output

▼

Description

Calculates min-max planning replenishment level...

☐

Notify me when this process ends

Schedule

As soon as possible

Submission Notes

Basic Options

Parameters

* Organization

4210451

▼

Step 7. Click the **Schedule** tab.

Image

Process Details ✕

ℹ This process will be queued up for submission at position 1

Process Options **Basic** **Submit** **Cancel**

Name Print Min-Max Planning Report ☐ Print output ▼

Description Calculates min-max planning replenishment level... ☐ Notify me when this process ends

Schedule As soon as possible **Submission Notes**

Advanced Options

Parameters **Schedule** **Output** **Notification**

* **Organization** 4210451 ▼

Step 8. Click the **Using a schedule** radio button. Choose the frequency from the **Frequency** drop-down list.

In this example, **Daily** was chosen.

Image

Advanced Options

Parameters **Schedule** Output Notification

Run ☐ As soon as possible
☒ Using a schedule

Frequency **Once** ▼

- Once
- Hourly/Minute
- Daily**
- Weekly
- Monthly
- Yearly
- User-Defined
- Use a Saved Schedule

* Start Date  (UTC-05:00) New York - Eastern Time (ET)

Step 9. Enter your **Start** and **End** Dates.

In this example, an end date of **2099** was chosen.

Image

Advanced Options

Parameters **Schedule** Output Notification

Run ☐ As soon as possible
☒ Using a schedule

Frequency

Days Between Runs

* Start Date (UTC-05:00) New York - Eastern Time (ET)

* End Date (UTC-05:00) New York - Eastern Time (ET)

[Manage Times](#)

Step 10. Click the **Output** tab to determine output location. Click **Add Output Document**.

Image

Process Details

This process will be queued up for submission at position 1

Process Options

Basic

Submit

Cancel

Name

Print Min-Max Planning Report

Description

Calculates min-max planning replenishment level...

Schedule

Using a schedule

Submission Notes

☐ Print output

☐ Notify me when this process ends

Advanced Options

Parameters

Schedule

Output

Notification

View

Name	Layout	Format
No document defined		

Step 11. Use **Name** field to name your output. Click **Add Destination** to choose a destination and complete relevant fields.

Image

Advanced Options

Parameters Schedule **Output** Notification

View ▼ + ✖ ?

Name	Layout	Format
Example Min-Max Planning Report	Min-Max Repc ▼	HTML ▼

InvMinMaxPlanningReportJob Document1: Destinations +
HTML
PDF
RTF
Excel (*.xlsx)
PowerPoint (*.pptx)
Data

Step 12. Click **Submit** to schedule your Min-Max Planning report.

Image

Process Details

ⓘ This process will be queued up for submission at position 1

Process Options Basic **Submit** Cancel

Name Print Min-Max Planning Report ☐ Print output ▼

Description Calculates min-max planning replenishment level... ☐ Notify me when this process ends

Schedule Using a schedule Submission Notes

Advanced Options

Wrap-Up

Schedule Min-Max Planning report using the steps above in NCFS.

Additional Resources

- Virtual Instructor-Led Training (VILT)
 - [INV 105: Warehouse Management](#)
 - [INV 106: Warehouse Transaction Support](#)

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