Key Data

Course #: 8398A

Number of Days: 2.0

Format: Instructor-Led

Certification Exams: None

Certification Track: None

This course syllabus should be used to determine whether the course is appropriate for the students, based on their current skills and technical training needs.

Course content, prices, and availability are subject to change without notice.

Course Syllabus

Course 8398A, Microsoft Axapta Master Planning

Elements of this syllabus are subject to change.

Introduction

This two-day course of the Microsoft® Business Solutions–Axapta® module Master planning explains this integrated module from the consultant's perspective.

This classroom course covers the most important functionality of the module. It covers the setup of the module as well as the different processes in master planning. The main focus is on purchased material to explain the functionality. It does not cover the questions about the Microsoft Business Solutions Axapta module Production. This course should be seen as preparation to attend the production courses. All material used in this course is based on Microsoft Business Solutions Axapta Version 3.0.

Audience

This course is designed for employees of Microsoft Business Solution Partners who work with and setup the Master planning module. This audience typically includes application consultants who are tasked with assessing a customers' business needs and advising them on the use, configuration, and customization of the application. Typically they work with the purchasing, production, and material management parts of the software as well. Alternatively, this course can be useful for key users of Microsoft Axapta who want to get a deeper knowledge of this part of the software.

After completing this course, students should understand:

• Create, set up, and understand master plans and forecast plans
• Create, set up, and understand coverage groups and the item coverage
• Process forecast plans and master plans
• Handle generated planned orders
• Know the difference between "one and two master plan strategy"
• Set up und understand reduction keys
• Set up und understand forecast models
• Set up und understand period allocation keys and item allocation keys

Prerequisites

Before attending this course, students must have:

• Completed the basic Microsoft Axapta courses
• Know how to navigate through the system

In addition it is recommended, but not required, that students have:

• A basic knowledge about master planning
• Some experience in practical use of a master planning module

Student Materials

The student materials include a comprehensive workbook.

Chapter 1: Course Overview

This module explains the targets and prerequisites of the course to the students. It is also used to determine the knowledge of the students regarding master planning.

Lessons
• Course prerequisites • Course objectives • Topics • The course material

Chapter 2: Introduction to Master Planning

This module explains the central functions of master planning. The difference between master scheduling and forecast scheduling is shown up. The students learn how to start a global and a local master scheduling as well as how to delete those plans.

Lessons
• Master planning • Forecast planning • Global master scheduling • Local master scheduling • Delete old plans

Exercises
• Master planning • Master planning and forecast planning • Global and local master scheduling

After completing this module, students should be able to:

- Describe the main concept of master planning in Microsoft Axapta
- Distinguish between forecast planning and master planning
- Distinguish between a local and a global master planning
- Delete old plans

Chapter 3: Master Plans, Parameters and Planned Orders

This module shows how to set up master plans in Microsoft Axapta. All the fields of the set up are explained. It is given a short overview about operations scheduling and job scheduling in this module. Furthermore the parameters of the module are shown. The one and two master plan strategy is set up and the main differences are pointed out. Finally the handling of the planned orders form is presented.

Lessons
• Introduction to master scheduling • Master plans • Operations scheduling vs. job scheduling • Parameters • Master plan strategies • Planned orders

Exercises
• Specify a vendor for items • One master plan strategy • Change to a two master plan strategy • Create a sales order • Explosion

After completing this module, students should be able to:

- Set up master plans
- Run master plans
- Understand the difference between one and two master plan strategy
- Deal with planned orders

Chapter 4: Coverage Groups

This module explains how to set up a coverage group. All the fields are shown. With examples, the different coverage principles of Microsoft Axapta are illustrated.

Lessons
• Introduction to coverage groups • Positive and negative days • Futures • Actions

Exercises
• Coverage code • New setup

After completing this module, students should be able to:

- Understand the main concept of coverage groups
- Know how to set up a coverage group
- Know the concept of positive and negative days
- Understand futures and actions

Chapter 5: Coverage Settings

This module explains the possibilities in setting up detailed coverage information on single items. The role of warehouses in connection with master planning is highlighted. Finally information on minimum- and maximum key and the use of the safety stock journal is given.

Lessons
• Introduction to coverage settings
• The Items table
• The Item coverage form
• Minimum/Maximum keys
• Item setup
• Warehouses
• Purchase lead times
• Safety stock journal

Exercises
• Adjusting item coverage using the Item coverage form
• Set up of Minimum keys

After completing this module, students should be able to:

- Set up coverage rules per item
- Specify detailed coverage information
- Understand the concept of warehouses in master planning
- Know minimum- and maximum keys
- Use the safety stock journal

Chapter 6: Forecast Plans

This module explains the concept of forecasting in Microsoft Axapta. Forecast plans are shown as well as their integration to master plans. Beneath setting up forecasts the students are able to reduce those figures according to different principles.

Lessons
• Forecast scheduling
• Forecast models
• Forecast plan
• Enter the forecast line
• The scheduling process and the result
• Item allocation keys
• Period allocation keys
• Reduction keys

Exercises
• Sales forecast

After completing this module, students should be able to:

- Set up item allocation keys
- Set up period allocation keys
- Create sales and purchase forecasts
- Run forecast scheduling
- Reduce the forecasts by reduction keys or open sales orders