Timogen Adaptive Controller User Guide

Version 3.0

TIMOGEN SYSTEMS™

Timogen Adaptive Controller User Guide
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Contents

Introduction

Timogen Adaptive Controller is a Supply Chain Resolution Management tool that enables manufacturing companies to identify and resolve supply chain problems instantaneously across an extended-enterprise supply chain network. It combines alert management, analytics, optimization-based problem resolution, advisory services, and business-process management to monitor planned and unplanned events across your entire supply chain and to provide the tools that you need to resolve supply chain problems.

Timogen Adaptive Controller provides real-time visibility into events and inventory at any point across a supply chain by accessing data from ERP, CRM, APS and other systems across trading partners in the supply chain. Alerts enable you to become aware of any unplanned events in the supply chain. Reports and on-line tools allow you to analyze events, orders, and inventory in the supply chain.

An optimization-based resolution tool generates advice to resolve the supply chain issues indicated by the alerts. A 'what-if' environment enables you to modify the system-generated advice and collaborate with other users to develop resolutions and solve the problems. A business-process management tool manages the implementation of the resolution process across the systems-of-record in the supply chain.

Timogen Adaptive Controller provides:

- Clear, real-time visibility of events occurring at any point in the extended supply chain.
- Immediate access to on-line, event resolution tools that communicate with your ERP, CRM, or other materials control system, allowing you to take the action necessary to resolve materials anomalies before they become a problem.
- On-line modeling tools that allow you to model a proposed change so you can see its effect over time before you initiate the action. These modeling tools, along with other analytic capabilities, also allow you to project and maintain the long-term health of the supply chain.

Timogen Adaptive Controller is configurable so you can customize its functionary to fit your supply chain and system landscape.

Timogen Adaptive Controller Concepts

Timogen Adaptive Controller uses standard business concepts, such as, forecasts, orders, inventory, and so on, as well as adding the following concepts:

Alerts

Alerts notify users of unexpected events that occurred in the supply chain. The parameters of the alerts, such as when the alerts should be triggered, under what conditions, and who should be notified, are configurable.

Timogen Adaptive Controller alerts are divided into two categories, event alerts and impact alerts.

Event Alerts

Event alerts notify users of unexpected or unplanned situations that occur at any point in the supply chain. Examples of event alerts include late delivery of supplies, quantity discrepancies in supply deliveries, or sales orders for a week being greater than forecast.

Impact Alerts

Impact alerts notify users of supply/demand imbalance for a particular item/location. Users can get advice from the Timogen Adaptive Controller system on how to solve these supply/demand imbalances.

Impact Nodes

An impact node is a particular combination of an inventory item and a location.

Sandboxes

A sandbox enables users to develop a resolution plan to solve or manage supply/demand imbalances. A sandbox is a virtual environment where users can interact with the system-generated resolution plan and modify and customize it.

Collaboration

Multiple users can collaborate in developing and modifying a resolution plan. The collaboration processes are executed within the sandbox environment.

Resolution Plans

Resolution plans are generated within a sandbox to solve supply/demand imbalance issues. These plans remain within the context of the sandbox are not visible outside the sandbox environment.

Resolution Process and Resolution Tasks

A Resolution Process is generated once a user executes a resolution plan in a sandbox. Each resolution process can consist of a numbers of actions that need to be taken and each of these actions is considered a Resolution Task. For example, a Resolution Process could consist of two resolution tasks with one resolution task to change an existing purchase order and another resolution task to create a new purchase order.

Timogen Adaptive Controller Features

Timogen Adaptive Controllerc collects inventory related data across the entire supply chain. When you have a question about inventory, you have instant access to data about the affected part. Not just how many you have in stock, but how many are in transit from, or in the inventory of, your primary (and other) suppliers. This is possible because Timogen Adaptive Controller Data Acquisition Components collect data from your supplier systems and report relevant data to the core installation.

Timogen Adaptive Controller maintains its own, independent, database in which trigger-points that are set by you determine when a shortage, overstock, or predictive alert is posted. When an alert is posted, Timogen Adaptive Controller provides the information you need to determine if the supply situation is transitory and can safely be monitored until current flow rectifies the issue or, if action is required, Timogen Adaptive Controller provides the tools you need to resolve the problem and reduces the time it takes to detect problems in supply chains through:

- Real time monitoring of inventory control systems
- Real time monitoring of active material transactions
- Real time monitoring of sales orders
- Prompt participant notification of shortage or overstock conditions
- Problem resolution tools
- Demand/Supply Matching predictive Alerts
- Advisory Tools

Real-Time Monitoring

Timogen Adaptive Controller monitors your inventory control system and the network traffic between your existing purchasing and receiving systems and those of your trading partners.It also monitors sales orders and shipping activity within your organization. It continuously updates its records based on material information collected from inventory, purchasing, and receiving systems, integrates demand information collected from sales and shipping, and compares the resulting data with user-determined target information maintained by the Timogen Adaptive Controller Server.

Timogen Adaptive Controller communicates with your trading partner systems through a data adapter deployed by your System Integrator. The requirements for this adapter are very flexible, allowing the System Integrator to choose ERP API, Webmethods, or Timogen Systems, Inc. Workflow as the interface between partner systems and the adapter and HTTP or FTP as the interface between the adapter and Timogen Adaptive Controller.

Timogen Adaptive Controller communicates with your company purchasing/receiving (ERP, CRM, or other) system through a Timogen Systems, Inc.provided Data Acquisition Adapter that is an integral part of the Timogen Adaptive Controller application.

Participant Notification

Timogen Adaptive Controller supports several types of system alerts. Within these alert types are alert categories that allow you to filter alerts based on such criteria as Days of Production, Dollar Value of Shortage, event timing, and more. Within each alert category there are three escalating alert levels that report event severity based on rule values you determine.

Alerts are always posted to a subscribed user's Control Panel and Alerts pages within Timogen Adaptive Controller and may be sent to their email accounts also if email notification is selected. Alerts are sent to Business Users with event resolution responsibility, and to other users who have subscribed to alerts pertaining to particular part numbers for informational purposes. Subscribers who are not Resolvers can see posted Alerts but do not have access to Resolution tools.

Problem Resolution Tools

Tactical Users responsible for resolving materials anomalies have immediate access to problem resolution tools. Through the resolution tools, users employ resolution processes configured by the system Business Administrator to effectively resolve supply chain problems in a manner conforming to established company procedures and industry best practices.

Supply/Demand Matching

Supply and demand matching provides a time-phased view of supply, demand, sales forecasts, MRP plan, sales orders, purchase orders, and manufacturing order information. This capability provides users an at-a-glance overview of goods on hand (allocated and unallocated), goods in transit, and goods on order so that future shortage or overstock potentialities can be readily detected. Supply/Demand Matching inputs include:

- Finished Goods Sales Orders
- Finished Goods Manufacturing Orders
- Finished Goods Contract Manufacturing Purchase Orders
- Supplier Purchase Orders
- Finished Goods MRP Plan
- BOM forward and reverse association (FG to RAW, RAW to FG)
- Finished Goods Inventory (on-hand, on-order, in-transit)
- Raw Material Purchase Order status
- Raw Material inventory (on-hand, on-order, in-transit)
- Supplier inventory

Advisory Tools

Useful to both Tactical and Strategic Users, Timogen Adaptive Controller modeling tools allow you to pose a "What If?" scenario by providing hypothetical change-data to the system and extrapolating the result over time. Tactical Users can see how a proposed resolution to an inventory anomaly will affect the resolution outcome. Strategic Users can pose hypothetical changes and project them into the future to architect potential supply chain improvements.

Timogen Adaptive Controller Functions

Timogen Adaptive Controller supply chain resolution management functions can be grouped into the following categories

Visibility

Timogen Adaptive Controller provides on-demand visibility into all the elements of a complex supply chain network. You can model the supply network within the four walls of your company as well as the supply network managed by your partners, such as contract manufacturers, distributors, suppliers, and hubs managed by 3PLs.

The supply network elements modeled include inventory, sales orders, transfer orders, purchase orders, manufacturing orders, reservations, and dependent requirements. The relevant data is aggregated in Timogen Adaptive Controller from disparate systems-of-record across the network. The data in Timogen Adaptive Controller is kept up-to-date with periodic or on-demand data synchronization processes.

Alerts are central elements of the Timogen Adaptive Controller system and they notify users to unplanned situations or unplanned events in the supply chain. You are presented with all the relevant details with the alert notification.

Analytics

You can access system-generated advice for solving a supply/demand imbalance and perform "What-if?" scenarios for solving the problem. With sandboxes, you can change the business objectives and the supply and demand constraints and then generate multiple solutions for solving the problem. You can compare two solutions side-by-side, evaluating both simultaneously. You can evaluate the feasibility of a solution any time to make sure that the underlying events have not impacted the resolution.

You can collaborate with other Timogen Adaptive Controller users in deciding on a solution. Within the collaboration, users have access to all the information regarding both the problem and the proposed solution. Collaboration users can enter notes on their input and also view notes entered by other users.

You can choose to execute the selected resolution, which generates the resolution tasks that are sent to the right people for approval and execution of the tasks.

Execution

You can view all the resolution tasks that are related to you, resolution tasks you have generated and the resolutions tasks that you need to approve or execute.

Reports

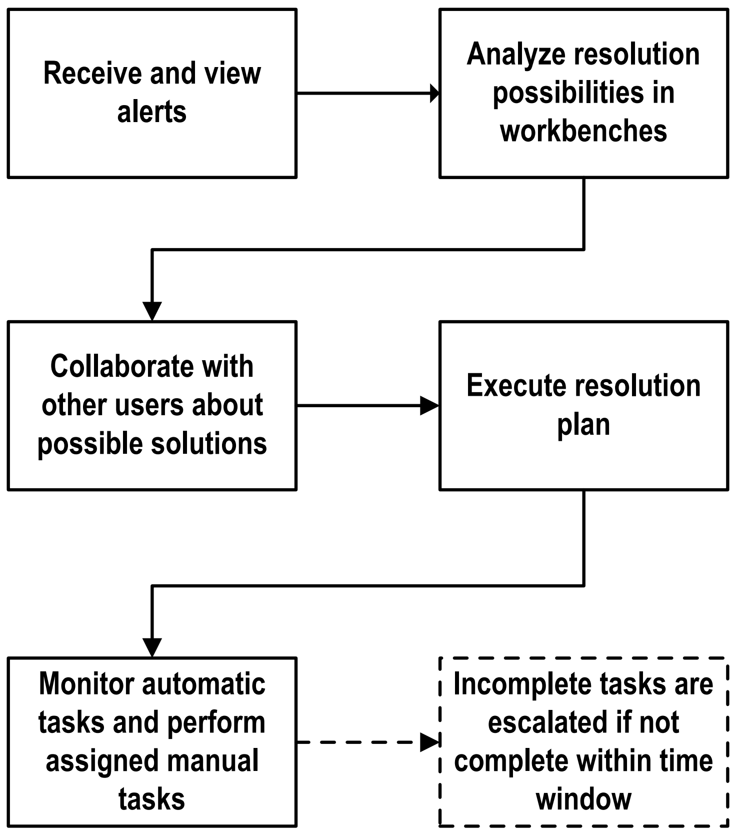
You can view available automatically generated reports and run on-demand reports when necessary.

Personalization

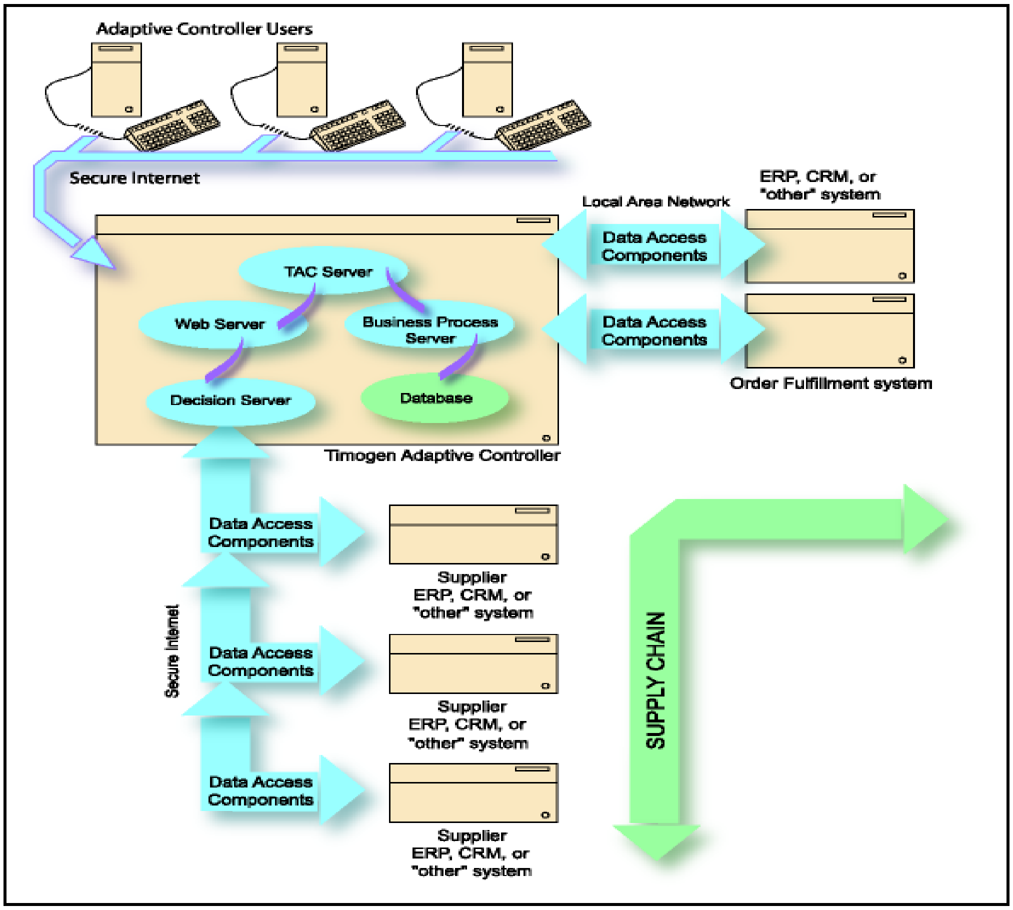
Timogen Adaptive Controller provides a number of personalization functions that allows you to customize system functions. You can subscribe to alerts of your choice, subscribe to impact nodes, choose the configuration of your Home page, select preferred items and locations, and manage your personal information.

Timogen Adaptive Controller Workflow

The following diagram illustrates the overall general workflow within Timogen Adaptive Controller:



Timogen Adaptive Controller Architecture



- Users: Users log on to Timogen Adaptive Controller through their existing web browser (Internet Explorer 5.5 minimum). The function (Business User, Business Admin, Tech Administrator) under which a user logs on determines level of access and interface presentation.
- Web Server: Timogen Adaptive Controller incorporates a web server that supports interaction with users through the web-based graphical user interface, allows user notification through automatically generated eMail messages, and supports data acquisition from supplier sites.
- TAC Server: This is the Timogen Adaptive Controller server component that supports unique Controller functionality including alert generation, managing automated resolution processes, and supply chain data acquisition.
- Business Process Server: This server supports the business processes underlying the Timogen Adaptive Controller event resolution toolset.
- Data Acquisition Components: Software constructs that provide interpretation, data exchange, and data gathering services between Timogen Adaptive Controller and other materials or order fulfillment systems.
- Database: Timogen Adaptive Controller uses a separately installed Oracle or DB2 database. The database installation is user-provided and is not part of the installation.

User Functions

Depending on the operations that need to be performed, Timogen Adaptive Controller users are divided into the following categories:

- Business Users are responsible for reviewing and resolving supply chain issues. They also have the long-term responsibility for supply chain maintenance and improvement. They are responsible for the following:
  - Reviewing and resolving event and impact alerts
  - Setting up collaboration requests
  - Define user tasks
  - Generate reports on demand
  - Setting up user profiles

  Business Users could include purchasing or procurement professionals, production planners, sales professionals, customer service agents, operational managers and business line managers. The functions that the Business User can perform are described in the section "Business User" on page 1.
- Business Administrators have planning and materials management expertise sufficient to determine the information and trigger point data that control event response. They are responsible for the following:
  - Setting up alerts
  - Managing privileges
  - Defining product groupings
  - Scheduling inventory reports
  - Creating problem configuration templates

  Business Admin users configure and manage Timogen Adaptive Controller business functionalities, including setting trigger points for alerts and setting up roles. Business Admin users should be seasoned supply chain professionals with significant supply chain experience and knowledge of Timogen Adaptive Controller functionalities.

  The functions that the Business Administrator can perform are described in the section "Business Admin" on page 97.
- Technical Administrators deal with the technical aspects of system configuration and deployment. They are responsible for the following:
  - Creating Users and Functions and assigning passwords.
  - Creating the Data Acquisition components that provide interpretation, data exchange and data gathering services between Timogen Adaptive Controller and ERP, CRM systems involved in supply chain and order fulfillment activities.
  - Scheduling data cleanup activities.
  - Setting up company and partner profiles.

  Technical Admin users configure and manage the Timogen Adaptive Controller technical functionalities, including user management, cache management, and integration management. Technical Admin users are expected to be seasoned information technology professionals who are responsible for managing the Timogen Adaptive Controller system landscape.

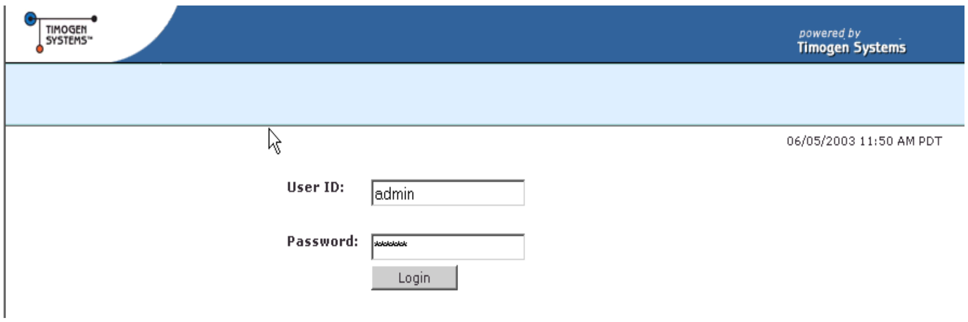
  The functions that the Technical Administrator can perform are described in the section "Technical Admin" on page 149.

Getting Started

After you have installed Timogen Adaptive Controller on your system, (for details on installing the product, see the *Timogen Adaptive Controller Installation Guide*) you should log in and start setting up the system for your comapny and your users:

1 Start your web browser (Internet Explorer 5.5 or later).

2 Go to `http://hostname:9080/ivan` (where "hostname" is the name of the Timogen Adaptive Controller server). The login page appears:



3 Enter the default User ID and Password.

Field Name	Description
User ID	The default User ID defined during product installation. Enter **IIMTechAdmin** as the default User ID.
Password	The default User ID defined during product installation. Enter **timogen** as the default User ID.

4 After entering the above details, click on the **Login** button to access the application.

5 Create new users and define their functions. The users that can be defined are:

- Technical Admin (this is the default user that is setup during installation of the product)
- Business Admin
- Business User

For more details on these users and their functions, see "User Functions" on page xvi.

Documentation Conventions

Bold	indicates operating system elements, such as filenames, directories, class names, buttons, check boxes, and menu commands
`Code`	indicates commands, formulae, syntax and code
Menu > Option	indicates what menu item to pick
\	indicates that a command is too long to fit in a single line

Related Documentation

The other documents related to Timogen Adaptive Controller 3.0 are listed below:

- Timogen Adaptive Controller Installation Guide
- Timogen Adaptive Controller Release Notes
- Timogen Adaptive Controller Online Help

  To read the .pdf files, you must have Adobe Acrobat Reader, version 4.0 or higher. If you do not have Acrobat Reader on your machine, you can download it from Adobe's Web site at `http://www.adobe.com`.

  To read the Help files, you must have one of the following browsers:

  - Internet Explorer, version 5.0 or higher. You can download this software from the Microsoft Web site at `http://www.microsoft.com/`.
  - Netscape, version 6.0 or higher. You can download this software from the Netscape Web site at `http://home.netscape.com/`.

Technical Support

Contact Customer Support by sending an email to `support@timogen.com`.

Part 1 Business User

Business Users are responsible for reviewing and resolving supply chain issues and have long-term responsibility for supply chain maintenance and improvement. They are responsible for the following:

- Reviewing and resolving event and impact alerts
- Setting up collaboration requests
- Define user tasks
- Generate reports on demand
- Setting up user profiles

Part I covers the following topics:

1

Home Page

Your Home page shows a summary of system events, such as your most recent Impact and Event Alerts, your most recently assigned Tasks, and your most recently accessed Sandboxes. It is the starting point for the Timogen Adaptive Controller system when you log on in or switch to the Business User function and contains tabs and links that take you to other areas.

This chapter contains the overview information about the information that can be on your Home page.:

To configure what you see on your Home page, see "Configuring Home Page Sections" on page 81.

Filtering Criteria

Each section title on the Home page has "filtering criteria" next to it. Move your mouse pointer over the "filtering criteria" text to view a pop-up window that explains the contents of that section.

Viewing All Records

Your Home page shows you just your newest records (Alerts, Tasks, etc.) that are also most recent, up to what you've defined in the Personalization tab. (See "Configuring Home Page Sections" on page 81.)

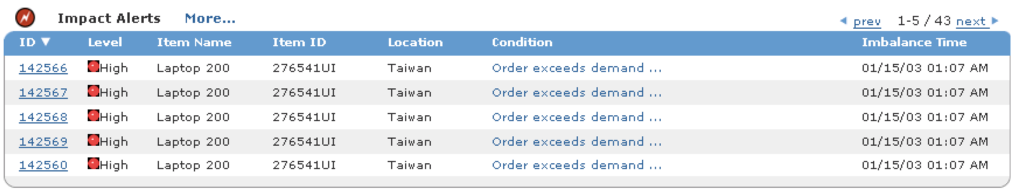
If you have al least one record listed in any Home page section, you can view all of those records by clicking **Full List**.

Impact Alerts

An Impact Alert indicates a shortage and/or overstock on an Impact Node. (See "Impact Nodes" on page 33.) A list of Impact Alerts that you are responsible for and have subscribed to is displayed in this table.

An Impact Alert appears in the Home page's Impact Alert list only when:

- The Alert is active
- You have subscribed to the Alert, and
- You have not archived the Alert


Impact Alerts More... prev 1-5 / 43 next

ID ▼	Level	Item Name	Item ID	Location	Condition	Imbalance Time
142566	High	Laptop 200	276541UI	Taiwan	Order exceeds demand ...	01/15/03 01:07 AM
142567	High	Laptop 200	276541UI	Taiwan	Order exceeds demand ...	01/15/03 01:07 AM
142568	High	Laptop 200	276541UI	Taiwan	Order exceeds demand ...	01/15/03 01:07 AM
142569	High	Laptop 200	276541UI	Taiwan	Order exceeds demand ...	01/15/03 01:07 AM
142560	High	Laptop 200	276541UI	Taiwan	Order exceeds demand ...	01/15/03 01:07 AM

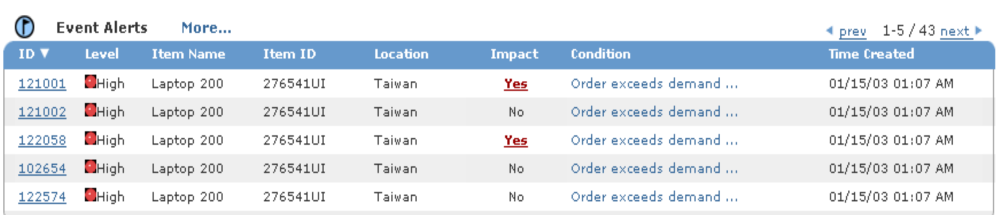
Field Name	Description
ID	The system ID of the alert.
Level	The level of the alert. Only High level alerts are displayed on the Home Page.
Item Name	The name of the item that is the subject of the alert.
Item ID	The ID of the item that is the subject of the alert.
Location	The location of the item.
Condition	A brief description of the condition that has caused the alert.
Imbalance Time	The time of the earliest overstock/shortage (earliest time bucket).

You can view detailed information about an Impact Alert and take steps to resolve it. To do so, click on the ID field of the alert. The corresponding Impact Alert page appears. For more information, see "Impact Alerts" on page 9.

Event Alerts

Alerts that react to external events are known as Event Alerts. A list of Event Alerts that you are responsible for and have subscribed to is displayed in this table. An Event Alert appears in the Home Page's list only when:

- The Alert is active
- You have subscribed to the Alert
- You have not archived the Alert


Event Alerts More... prev 1-5 / 43 next

ID ▼	Level	Item Name	Item ID	Location	Impact	Condition	Time Created
121001	High	Laptop 200	276541UI	Taiwan	Yes	Order exceeds demand ...	01/15/03 01:07 AM
121002	High	Laptop 200	276541UI	Taiwan	No	Order exceeds demand ...	01/15/03 01:07 AM
122058	High	Laptop 200	276541UI	Taiwan	Yes	Order exceeds demand ...	01/15/03 01:07 AM
102654	High	Laptop 200	276541UI	Taiwan	No	Order exceeds demand ...	01/15/03 01:07 AM
122574	High	Laptop 200	276541UI	Taiwan	No	Order exceeds demand ...	01/15/03 01:07 AM

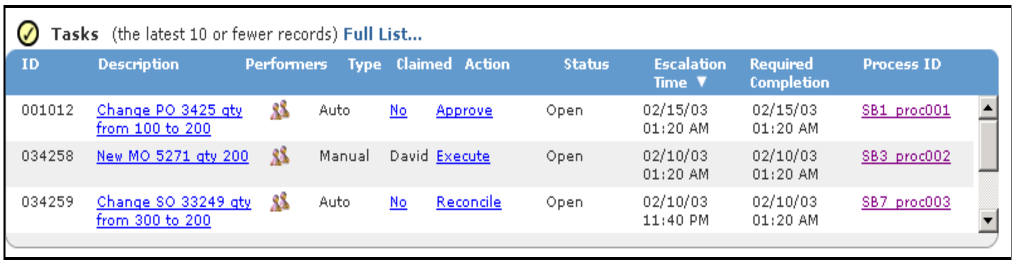
Field Name	Description
ID	The system ID of the alert.
Level	The level of the alert. Only high level alerts are displayed on the Home Page.
Item Name	The name of the item that is the subject of the alert.

Field Name	Description
Item ID	The ID of the item that is the subject of the alert.
Location	The location of the item.
Impact	Indicates whether there are Impact Alerts for related Impact Nodes. If this field is **Yes**, click on it to go to the Impact Alert page.
Condition	A brief description of the condition that has caused the alert.
Time Created	The time that the Alert was created.

You can view detailed information about an Event Alert and take steps to resolve it. To do so, click on the ID field of the alert. The corresponding Event Alert page appears. If the value in the Impact field is **Yes**, if you click on this field, a list of Impact Alerts appears. Click on the **Alert ID** to go to the Impact Alert screen. For more information about Event Alerts, see "Event Alerts" on page 4.

Tasks

All tasks assigned to you, that require your input/approval to proceed, are listed in this table.


Tasks (the latest 10 or fewer records) Full List...

ID	Description	Performers	Type	Claimed	Action	Status	Escalation Time ▼	Required Completion	Process ID
001012	Change PO 3425 qty from 100 to 200		Auto	No	Approve	Open	02/15/03 01:20 AM	02/15/03 01:20 AM	SB1_proc001
034258	New MO 5271 qty 200		Manual	David	Execute	Open	02/10/03 01:20 AM	02/10/03 01:20 AM	SB3_proc002
034259	Change SO 33249 qty from 300 to 200		Auto	No	Reconcile	Open	02/10/03 11:40 PM	02/10/03 01:20 AM	SB7_proc003

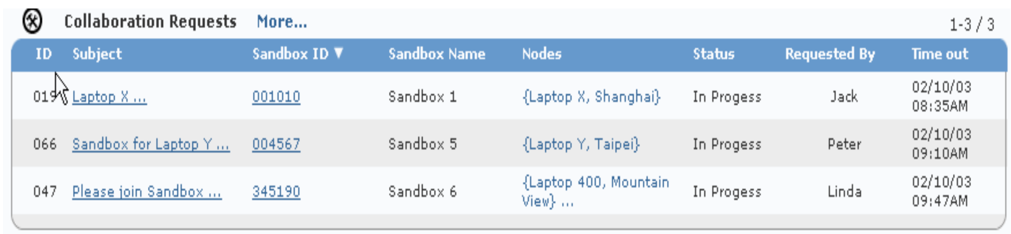
Field Name	Description
ID	The system ID of the task.
Description	A brief description of the task. Click on a specific description to see more details.
My Task	Indicates if this task is assigned to you. Click on the icon to see the Approvers and Executors for this task.
Type	The type of task. This can be: • Auto • Manual
Actions	The action to be taken to resolve this task. This can be: • Approve • Execute • Acknowledge
Status	The current status of the task. This can be: • Open • Pending • Closed

Field Name	Description
Escalation Time	The date and the time when the task was escalated.
Required Completion	The date when the task needs to be completed.
Process ID	The Resolution Process ID for the task.

To view detailed information about a **Task**, click on the **Description** field of the **Task** you wish to view. The Task Description Detail page appears. When you click on the Process ID of a Task, the Resolution Process page appears. For more information about the Resolution Process, see "Execution" on page 57.

Collaboration Requests

Every sandbox has an owner. The owner can include other users as participants and ask them for collaboration. This table contains a list of collaboration requests sent to you.

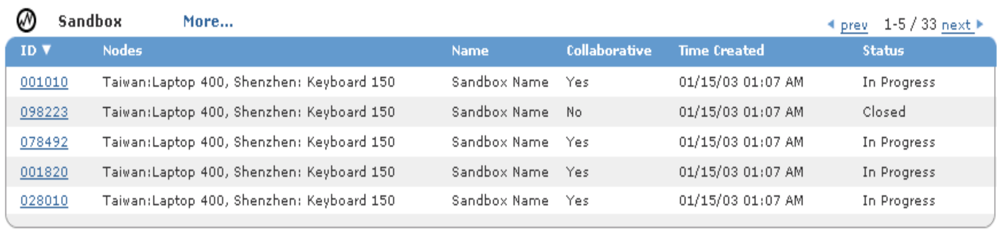


Field Name	Description
ID	The ID of the collaboration request.
Subject	The subject of the collaboration request. Click on the subject to view the Request in more detail and make modifications if necessary.
Sandbox ID	The sandbox with which this request is associated. Click on the Sandbox ID to view detailed information of the sandbox.
Sandbox Name	The name of the sandbox.
Nodes	The Impact Nodes included in the scope of the sandbox.
Status	The status of the collaboration request.
Requested By	The name of the person who requested for collaboration.
Time Out	The date and time all collaboration input must be completed.

To view more detail about a request, click on the **Description** field. The Collaboration Request page appears. You can view more details about the sandbox by clicking on the Sandbox ID. For more details on sandboxes, refer to "Analysis Sandbox" on page 41.

Sandboxes

Sandboxes is a feature that allows you to scope problems and seek scoped solutions. This table contains a list of sandboxes for which you are the owner/participant.


Sandbox More... prev 1-5 / 33 next

ID ▼	Nodes	Name	Collaborative	Time Created	Status
001010	Taiwan:Laptop 400, Shenzhen: Keyboard 150	Sandbox Name	Yes	01/15/03 01:07 AM	In Progress
098223	Taiwan:Laptop 400, Shenzhen: Keyboard 150	Sandbox Name	No	01/15/03 01:07 AM	Closed
078492	Taiwan:Laptop 400, Shenzhen: Keyboard 150	Sandbox Name	Yes	01/15/03 01:07 AM	In Progress
001820	Taiwan:Laptop 400, Shenzhen: Keyboard 150	Sandbox Name	Yes	01/15/03 01:07 AM	In Progress
028010	Taiwan:Laptop 400, Shenzhen: Keyboard 150	Sandbox Name	Yes	01/15/03 01:07 AM	In Progress

Field Name	Description
ID	The system ID of the sandbox.
Nodes	The impact nodes that are within the scope of the sandbox.
Name	The name of the sandbox. This is unique, is assigned during creation and cannot be changed.
Collaborative	Each sandbox has a owner. The owner can include other users as participants and ask them for collaboration. This field indicates whether there are other users collaborating with the owner to scope the problem and resolve it.
Time Created	The date and the time on which this sandbox was created.
Status	The current status of this sandbox. This can be: • Closed • In Progress

To view detailed information about a sandbox, click on the ID field of the sandbox you wish to view. The associated detailed sandbox page appears. For more information about sandboxes, see “Analysis Sandbox” on page 41.

2

Impact and Event Alerts

Impact Alerts occur when there is a shortage or overstock condition. Event Alerts occur for business events, unexpected or unplanned situations along the supply chain. Alerts allow you to get analysis of the production and financial impact of the alert condition. The **Business Admin** user defines when and how an alert is created and used. For more information on defining alerts, see "Alert Definition" on page 99.

All of your Impact and Event Alerts, active and archived, are listed on the Visibility tab (the Home tab shows just the most recent active alerts).

This chapter explains Impact Alerts and Event Alerts and how they are used in Timogen Adaptive Controller. Procedures for resolving alerts is also covered.

Both Impact Alerts and Event Alerts contain similar information and you will work with them almost always the same way. This chapter describes how to work with both alerts, noting differences where they apply.

Impact Alerts

Impact Alerts indicate a shortage or overstock on an Impact Node. Each Impact Node can have only one Impact Alert, so Impact Alerts handle both overstocks and shortages simultaneously. All the Impact Alerts that you have subscribed to and are responsible for are displayed on the Impact Alert list page. From this page you can:

- View individual alerts in greater detail
- Archive alerts
- View or create sandboxes

For information on subscribing to Impact Alerts, see "Alert Subscriptions" on page 83.

Event Alerts

Alerts that react to external events are called Event Alerts. All Event Alerts that you have subscribed to and responsible for are displayed here. In this screen, you can:

- View individual alerts in greater detail
- Archive alerts
- Manually initiate custom alerts

Viewing Lists

Impact Alerts and Event Alerts are shown as lists of records on their respective pages. The lists show essential information about each record.

To view an Impact or Event Alert list

1 In the Function drop-down list, select Business User.

2 Click the Visibility tab.

3 Click a list page link under the tabs for the list you want to view:

- Impact Alerts
- Event Alerts

For any list view, you can click on a column header that is a link (underlined) to sort the records by the contents of that column. You can also filter the contents of the list to view a subset of the records.

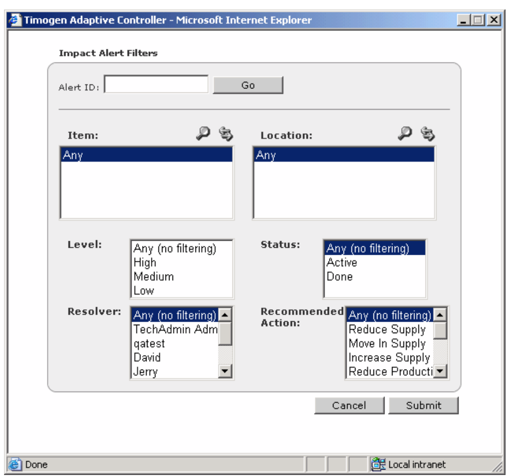
Filtering Lists

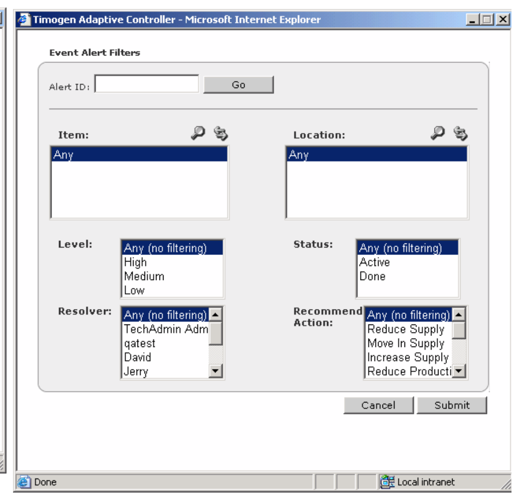
The default view for lists of Impact Alerts and Event Alerts is to view all that you've subscribed to. If the list is long, it is separated into pages.

You can filter any list to make it shorter and easier to find the records you are interested in.

To filter a list

1 On an Impact Alert or Event Alert list page, click . The Filter dialog box for the type of record appears.





2 Enter or select the filter criteria:

- If you know the Alert ID, enter it and click **Go**.
- Select one or more Items, Locations, Levels, Statuses, Resolvers, and Recommended Actions (to select more than one, hold down the CRTL key while you click), then click **Submit**.

Note: To view more records in the Items and Locations lists, click , then find and select one or more Items and Locations.

List View Details

The table in this section describes the information in both Impact Alert and Event Alert lists. Information that is only in an Impact Alert list or an Event Alert list is noted:

Field Name	Description
Alert ID	The system ID of the alert. The Alert ID is also a link. Click the link to view details of the alert.
Level	The severity level of the alert. This can be: • Low • Medium • High
Status	The status of this alert. This can be: • Active • Closed Whenever the status of an Alert changes, a Note is added to the Alert to indicate the time the status change has occurred.
Need Action	Indicates whether the you are responsible for taking action to resolve the Alert.
Item Name	The name of the item that is the subject of the alert.
Item ID	The ID of the item that is the subject of the alert.
Location	The location of the monitored item.
Current Resolver	The person responsible for resolving the alert. A Resolver can: • Change the status of the Alert • Initiate and control the resolution process of an Alert
Impact (Event Alerts only)	Indicates whether there are any Impact Alerts for related Impact Nodes. If the Event Alert is only for a single item and a single location, when you click on Yes, the Impact Alert screen is displayed. If there are multiple Impact Alerts, a pop-up window with a list of Impact Alerts is displayed. You can select from the list to see the Impact Alert details.
Escalation Time	The date and time at which the Alert will be escalated to an additional set of Resolvers. The Alert will be escalated only if the Alert has not been handled in the required time period.
Imbalance Time (Impact Alerts only)	The date and time of the earliest overstock or shortage (earliest time bucket).
Sandboxes (Impact Alerts only)	The sandboxes related to this Impact Alert Click to create a new sandbox for the Impact Alert.
Time Created (Event Alerts only)	The date and time on which this Alert was created.
Recomm. Action (Event Alerts only)	The recommended action to be taken to resolve the alert.
Condition	If the alert is active, a brief description of the condition that has caused the alert.

Viewing Alerts

You can view details about any alert, Impact or Event, active or archived.

To view alert details

1. Click the **Visibility** tab, then click **Impact Alerts** or **Event Alerts**.
2. Click the **Alert ID** link.
3. If the Alert you want to view is archived (not current), from the drop-down list next to the page title, select **Archived Alert(s)**.
4. Click the **Alert ID** link. The Alert detail page appears.

The detail pages for Impact Alerts and Event Alerts have much information in common and some information specific to the type of alert.

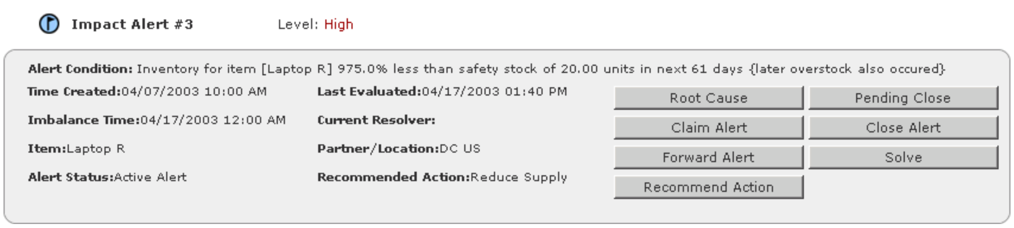
Alert Details

This section explains what you see on the detail pages for Impact Alerts and Event Alerts. The Impact Alert detail page is divided into 2 panes and the Event Alert detail page is divided into 3 panes.

The header of the alert, above the top pane (the Alert Summary Pane), includes the type of alert (Impact or Event), the alert ID (the system-generated unique ID for the alert), and the alert Level (High, Med, or Low).

Alert Detail Page - Top Pane

The top pane, the Alert Summary pane, of both alert detail pages lists information about the Impact Alert and contains buttons to take actions on the alert.



The Alert Summary Pane includes these pieces of information about the alert:

Name	Description
Alert Condition	If the alert is active, a brief description of the condition that has caused the alert.
Time Created	The date and time on which this Alert was created.
Imbalance Time (Impact Alerts only)	The date and time of the earliest overstock or shortage (earliest time bucket).
Impact (Event Alerts only)	Indicates whether there are any Impact Alerts for related Impact Nodes. If the Event Alert is only for a single item and a single location, when you click on Yes, the Impact Alert screen is displayed. If there are multiple Impact Alerts, a pop-up window with a list of Impact Alerts is displayed. You can select from the list to see the Impact Alert details.
Item	The name of the item that is the subject of the alert.

Name	Description
Alert Status	The status of this alert. This can be: • Active • Closed Whenever the status of an Alert changes, a Note is added to the Alert to indicate the time the status change has occurred.
Need Action	Indicates whether the you are responsible for taking action to resolve the Alert.
Last Evaluated	
Current Resolver	The person responsible for resolving the alert. A Resolver can: • Change the status of the Alert • Initiate and control the resolution process of an Alert
Location	The location of the monitored item.
Recommended Action	The recommended action to be taken to resolve the alert.
Escalation Time	The date and time at which the Alert will be escalated to an additional set of Resolvers. The Alert will be escalated only if the Alert has not been handled in the required time period.

In addition, the top pane contains several buttons, which are used to take actions against the alert. Button are enabled only for alert resolvers. They include:

- **Root Cause** (Impact Alerts only) - The Impact Alert may be caused by multiple event alerts. When you click on the **Root Cause** button, a pop-up window containing the list of event alerts is displayed. You can choose an Event Alert from the list and click **Select** to view this Event Alert.
- **Claim Alert** - You can claim an alert (assign) to yourself. In other words, this makes you the current resolver for the alert. When you click on the **Claim Alert** button, it is assigned to you, a Note is added, and the status is marked as “In Progress”.
- **Forward Alert** - You can forward an alert to another user (with the Business User / Business Admin function). The user to whom the alert is forwarded becomes the current Resolver of that Alert.
- **Recommend Action** - This option allows you to change the current setting of the **Recommend Action** field. When you click on the **Recommend Action** button, a pop-up window containing a list of actions to be performed is displayed. Choose an action from the list and click **Submit** to make it the Recommended Action for this alert.
- **Pending Close -** You can close an alert using the Pending Close option. Click on the Pending Close button. You are prompted for the time limit upto which the alert can be ignored. The time limit is in hours and can be from 1 to 720 hours (30 days). Once an alert is marked as Pending Close, it will not be treated as an active alert and will not be listed on the Home Page. If the Alert is not automatically closed (the business data changes so the alert is not longer true) within the full period (time limit), the alert will be reactivated and the status of the alert will be changed to ‘Active - reactivated’. The Resolver can manually change the status of alert by marking the status to ‘Mark in Progress’. This changes the status of the alert to Active.

- **Close Alert** - You can manually close an alert using this option. Click on the **Close Alert** button. A pop-up window with the following options is displayed.
  - Mark Closed

    This option manually closes the Alert.
  - Mark Closed and Ignore With Time Limit

    The Resolver can manually close the Alert and specify a time period (ignore time) during which the Alert is not evaluated. The Ignore Time is in hours and can be from 0 to 720 hours (30 days). If more than one Resolver has been assigned to the Alert, each Resolver can set a different Ignore Time.

    11:05 Resolver1 says ignore for 4 hours

    13:20 Resolver2 says ignore for 3 hours

    16:20 ignore time expires

    Total ignore time is 5:15
  - Mark Closed and Ignore Time Buckets

    Marks the alert closed and the Timogen Adaptive Controller system ignores the specific combination of criteria that created the alert for the next number of time buckets you specify. Once the time buckets pass. alerts can be generated again for the same combination of criteria.
  - Mark Closed and Ignore Execution Actions

    Marks the alert closed and the Timogen Adaptive Controller system ignores the order (purchase order, manufacturing order, sales order, or transfer order) that triggered the alert.
- **Solve** - You can resolve the alert using any of the existing sandboxes or create a new sandbox to resolve this alert. To do so, click **Solve**, a list of existing sandboxes is displayed.
  - To use an existing sandbox, choose a sandbox from the list and click **Go To Sandbox**. The Sandbox screen is displayed. You can generate / execute the resolution plan here.
  - To create a new sandbox, click **Create.** You are prompted for the Sandbox Name and Description. Enter the details and click **Submit**. The Sandbox screen is displayed. You can define the resolution plan and generate / execute it to resolve the alert.

Alert Detail Page - Middle Pane

The middle pane exists only for Event Alerts and contains details about the alert condition. The content of this pane is different for each category of alert

Alert Detail Page - Bottom Pane

The bottom pane of both alert detail pages contains tabbed sections where you can find information about the alert, add additional information to the alert, and perform other actions. The most important tab is Supply/Demand, where you can drill down to see specific actual and predicted numbers that will help you decide how to resolve the alert.

The following sections describe the content of each tab.

Supply Demand Tab The Supply Demand View (SDV) provides a comparative view of inventory levels, demand, and sales forecasts for the item, charted over time. Click on the **Filter** button to customize this view. A pop-up window is displayed. Enter the Number of Buckets and the Starting Date and click **Submit**.The following details are displayed:

- Beginning Inventory
- Inflows
- Outflows
- Ending Inventory (Values that cross the Impact Alert thresholds will be highlighted. This helps in identifying the buckets that have problems)

You can:

- View more details about the Inflow/Outflow by clicking on Up or Down arrows.
- Click on the **View BOM** button to see the Bill of Materials.

Notes Tab This table shows a list of Notes attached to the Alert. Notes are useful in tracking Alert history. All users who have subscribed to this Alert can add and view the Notes associated with an Alert. To add a Note, enter the details in the window and click Add Note.

Notes are also generated when:

- You select Close or Mark in Progress for an Alert.
- The Alert Status is changed by the system.
- An Alert is forwarded by the Resolver.
- The severity level of the Alert changes.

Attachments Tab Alert resolvers can attach supporting documents to an Alert.To do so click the Attachments tab and enter the name and the full path of the file to be attached or click Browse and select the document to be attached.

Resolvers can also:

- Download an existing attachment by clicking Download. You will be prompted for the location onto which the attachment is to be saved. Specify the location and click OK to download the attachment.
- Delete an attachment which is not required. To do so, enable the checkbox of the Attachment to be deleted and click Delete.

Any user who can view the alert can view any attachment.

Resolvers Tab This tab shows a list of alternate resolvers for this Alert. Alert resolvers can:

- Add a Resolver. To do so, select the Resolver name from the valid users list in the lower left, then click **Add.**
- Delete a Resolver. To do so, enable the check box of the Resolver to be deleted and click **Delete**.

Viewers Tab This tab shows a list of viewers for this Alert. Alert resolvers can:

- Add a Viewer. To do so, select the Viewer name from the valid users list in the lower left, then click **Add**. The Viewer though not subscribed, will be able to view the Alert details.
- Unarchive an Alert that has been archived. To do so, select an archived Alert by enabling the associated checkbox and click **Unarchive**. The status of the Alert will now change to Active.

Update Tab This tab appears only in manual and external alert pages and allows you to update information about the alert.

Notification Tab This tab allows you to send an email notification of the Alert to Alternate Resolvers. You can also include attachments with your message. After specifying all the details, click **Send Email**. The notification will be sent to the specified recipients.

Archiving Alerts

Alerts can be active or archived. On the Visibility tab, active and archived alerts are viewed on separate pages. On the Home page, you can view only active alerts.

Archiving alerts does not remove them from the Timogen Adaptive Controller system. Typically, you'll want to archive alerts once you've resolved and closed them so they will not clutter up your alert lists.

To archive an alert

1. View an alert list. (See "Viewing Lists" on page 10.)
2. Select the check box at the right end of the record line for the alert(s) you want to archive. (Select the check box at the top of the column to select all the records.)
3. Click **Archive**.

Unarchiving Alerts

To unarchive an alert

1. View an alert list. (See "Viewing Lists" on page 10.)
2. In the drop-down list next to the list title, select **Archive**.
3. Select the check box at the right end of the record line for the alert(s) you want to unarchive. (Select the check box at the top of the column to select all the records.)
4. Click **Unarchive**.

Claiming Alerts

Claiming an alert assigns it to you, which makes you the current resolver for the alert. You must be a resolver to claim an alert.

To claim an alert

1. View the detail page of the alert you want to claim. (See "Viewing Alerts" on page 12.)
2. Click **Claim Alert**. A conformation message appears.
3. Click **Yes**.

When you claim an alert, a note is added to the alert and the alert status as changed to "In Progress".

Finding an Impact Alert's Cause

An Impact Alert can occur as a result of one or more related Event Alerts. You can easily find the cause of any Impact Alert when that cause is an Event Alert.

To find an Impact Alert's cause

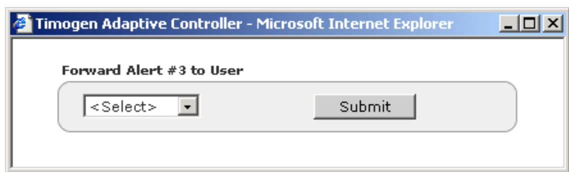
1. View the detail page of the alert you want to find the cause of. (See "Viewing Alerts" on page 12.)
2. Click **Root Cause**.
   - If the cause was a single Event Alert, you'll see its detail page.
   - If the cause was two or more Event Alerts, you'll see a list of the alerts.

Forwarding Alerts

An alert resolver can forward any alert to another Timogen Adaptive Controller user.

To forward an alert

1. View the detail page of the alert you want to forward. (See "Viewing Alerts" on page 12.)
2. Click **Forward Alert**. The Forward Alert dialog box appears.



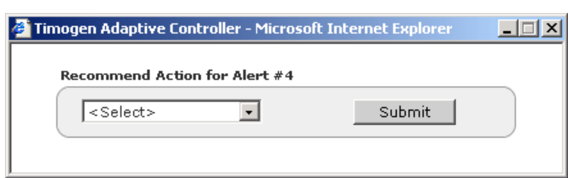
3. In the drop-down list box, select a user name.
4. Click **Submit**.

Recommending Action for an Alert

When an alert is generated, Timogen Adaptive Controller selects a default recommended action to resolve the alert. A alert resolver has the option to recommend a different action.

To recommend an action for an alert

1. View the detail page of the alert you want to recommend an action for. (See "Viewing Alerts" on page 12.)
2. Click **Recommend Action**. The Recommend Action dialog box appears.



3 In the drop-down list box, select an action. Choose from:
- Move In Supply
- Increase Supply
- Reduce Production
- Push Out Supply
- Push Out Demand
- Discretionary
- Reduce Demand
- Increase Production
- Move In Production
- Push Out Production

4 Click **Submit**.

Solving Alerts

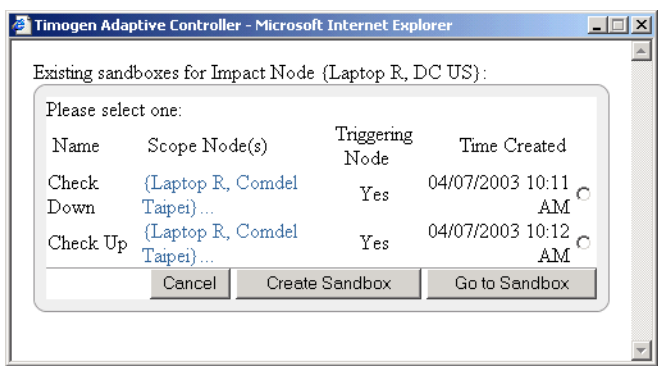
You solve alerts by using sandboxes to create scenarios and test different resolution plans, testing both the recommended action and any alternate actions you might think would work better. Once you determine the best course of action, you can implement the best solution.

Sandboxes exist for one or more Impact Nodes. When an alert occurs on a Impact Node where sandboxes exist, you can select from those sandboxes to solve the alert. You can also create a new sandbox. For more information, see "Analysis Sandbox" on page 41.

To solve an alert

1 View the detail page of the alert you want to solve. (See "Viewing Alerts" on page 12.)

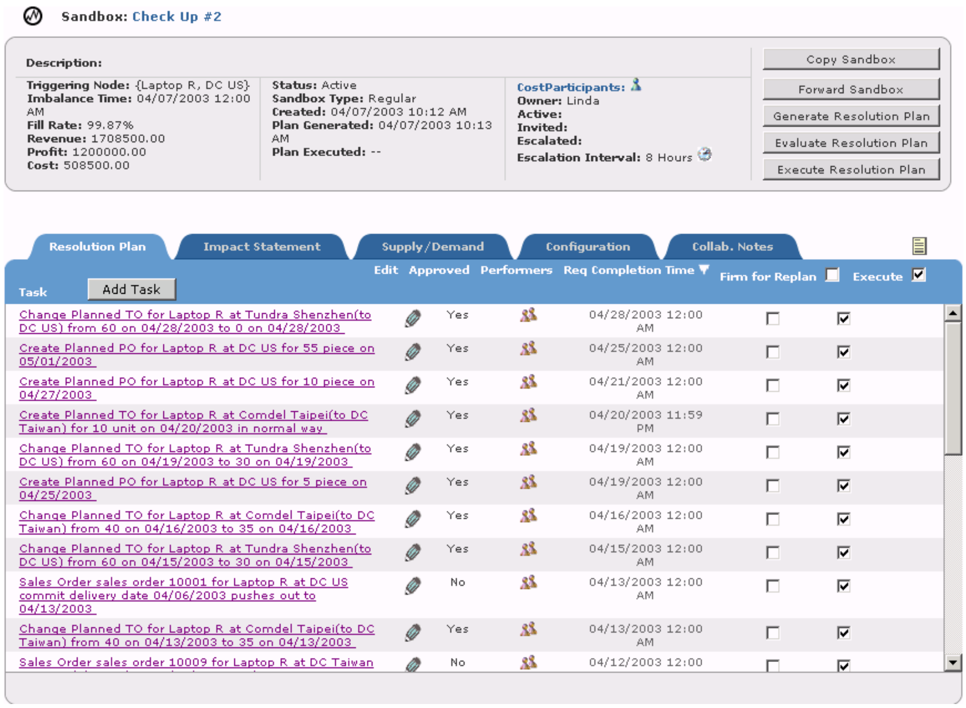
2 Click **Solve**. The Existing Sandboxes of Impact Node dialog box appears.



Note: If no sandboxes exist for the Impact Node, then the New Sandbox dialog box appears.

3 Select an existing sandbox, then click Go to Sandbox.
-or-
To create a new sandbox, click Create Sandbox. In the Create Sandbox dialog box, enter the new sandbox information (see "Creating Sandboxes" on page 44), then click **OK** in the confirmation dialog box.

Whether using an existing sandbox or creating a new one, the sandbox page appears using a generated Resolution Plan.



4 Review the Resolution Plan information, click to edit any Task, then click **Execute Resolution Plan** when you're satisfied that the Task(s) will solve the alert.

5 In the confirmation dialog box, click **Yes**.

Pending Alert Close

If you've begun action on an alert, but more remains (for example, the resolution depends on data from an ERP system), you can mark the alert as pending close. You set a time, from 1 to 720 hours, before it will be re-evaluated by the system. During that time:

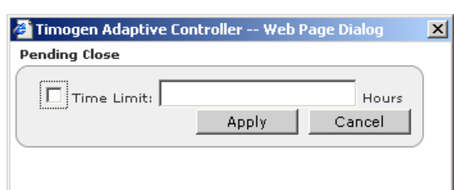
- If the alert resolution completes, the alert will close automatically.
- If the alert resolution does not complete, the alert is reactivated and given the status "Active - reactivated."

Alerts that have pending close do not appear on your Home page, but they will still remain in your active alert list until you archive them. If they become reactivated, you can then assess why the resolution was not completed and take any needed additional action.

To pending close an alert

1 View the detail page of the alert you want to set as pending close. (See "Viewing Alerts" on page 12.)

2 Click **Pending Close**. The Pending Close dialog box appears.



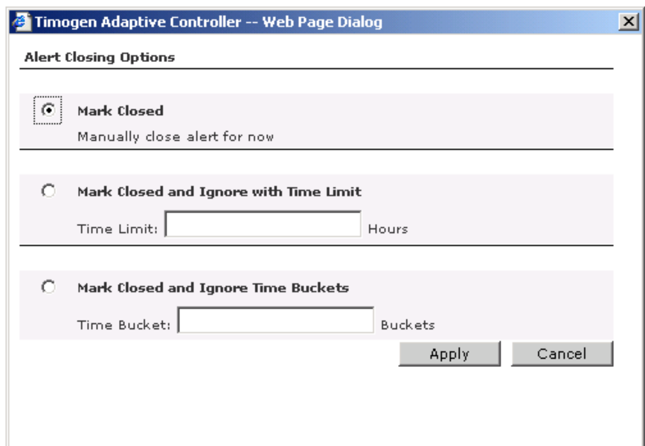
3. Select the **Time Limit** check box.
4. In the **Hours** text box, enter a number of hours from 1 to 720 (equivalent to 30 days).
5. Click **Apply**.

Closing Alerts

You can close an alert instead of taking action on it. When you close an alert, you have several options that can prevent similar alerts from being generated for a specified time.

To close an alert

1. View the detail page of the alert you want to close. (See "Viewing Alerts" on page 12.)
2. Click **Close Alert**. The Alert Closing Options dialog box appears.



3. Select an alert closing option:

Option	Description
Mark Closed	Marks the alert closed and no further action can be taken on the alert. This option is generally best used for manual or external alerts because closing an alert does not implement any resolution. As a result, existing data within the Timogen Adaptive Controller system may generate another, similar alert.
Mark Closed and Ignore With Time Limit	Marks the alert closed and the Timogen Adaptive Controller system ignores the specific combination of criteria that created the alert for the time period you specify. Once the time period passes. alerts can be generated again for the same combination of criteria.

Option	Description
Mark Closed and Ignore Time Buckets	Marks the alert closed and the Timogen Adaptive Controller system ignores the specific combination of criteria that created the alert for the next number of time buckets you specify. Once the time buckets pass. alerts can be generated again for the same combination of criteria.
Mark Closed and Ignore Execution Actions	Marks the alert closed and the Timogen Adaptive Controller system ignores the order (purchase order, manufacturing order, sales order, or transfer order) that triggered the alert.

4 Click **Apply**.

Viewing Supply/Demand Buckets

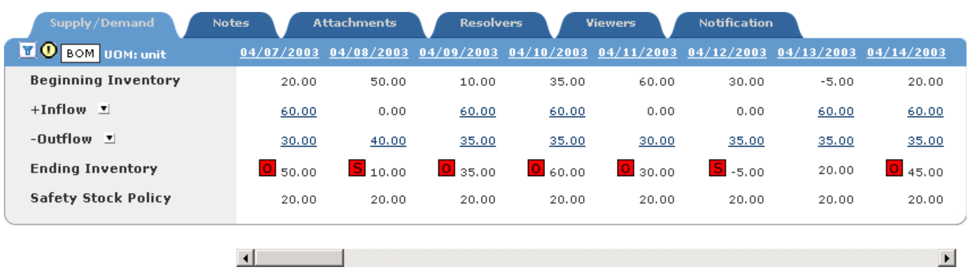
Alerts are generated when there is a shortage or overstock (Impact Alert) or a supply/demand mismatch (Event Alert). Included in the alert information is supply and demand data over the next several time buckets.

Note: You set the default number of time buckets viewed on your Preferences page. See "Search and Filter List Defaults" on page 92 for more information.

To view supply/demand buckets

1 View the detail page of the alert that contains the supply/demand information you want to view. (See "Viewing Alerts" on page 12.)

2 In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Supply/Demand** tab.



BOM UOM: unit	04/07/2003	04/08/2003	04/09/2003	04/10/2003	04/11/2003	04/12/2003	04/13/2003	04/14/2003
Beginning Inventory	20.00	50.00	10.00	35.00	60.00	30.00	-5.00	20.00
+Inflow	60.00	0.00	60.00	60.00	0.00	0.00	60.00	60.00
-Outflow	30.00	40.00	35.00	35.00	30.00	35.00	35.00	35.00
Ending Inventory	O 50.00	S 10.00	O 35.00	O 60.00	O 30.00	S -5.00	20.00	O 45.00
Safety Stock Policy	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00

Click next to Inflow or Outflow to see PO, MO, and TransferIn (Inflow) information and Sales Demand, Dependent Demand, and Transfer Out (Outflow) information. Click next to any of those categories to see Plan, Actual, and Resolution details.

Hover the mouse pointer over to view information about the last time inventory information about this item and location was updated from an ERP system.

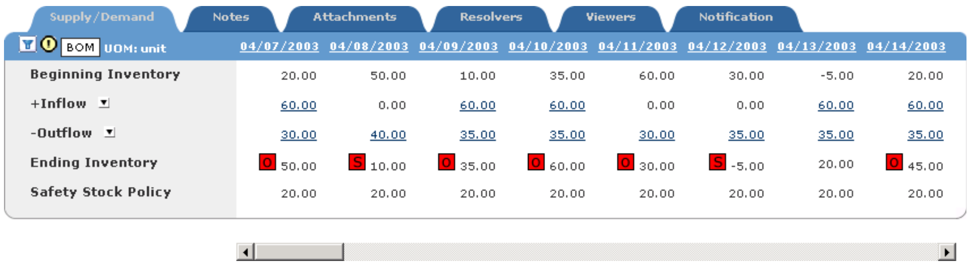
Changing Buckets for a Supply/Demand View

If the number of buckets for a supply/demand view in an alert doesn't provide enough information (or provides too much), you can change the number of buckets for that alert. You can also change the start date for the view.

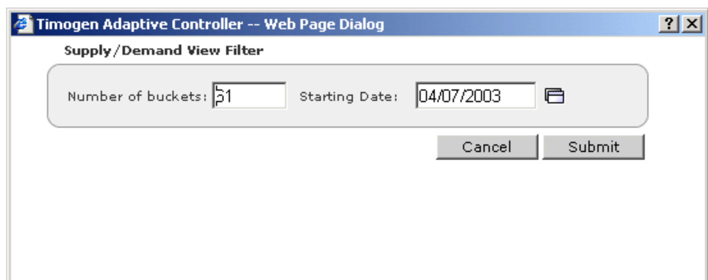
To change the buckets for a supply/demand view

1 View the detail page of the alert that contains the supply/demand information you want to view. (See “Viewing Alerts” on page 12.)

2 In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Supply/Demand** tab.



3 Click . The Supply/Demand View Filter dialog box appears.



Note: You can hover the mouse pointer over to see the current bucket number and start date settings for the view.

The default values in the dialog box are the current values for the view.

4 Enter the new bucket information:

- Enter a number in the **Number of Buckets** field
- Enter a date in the format MM/DD/YYYY in the **Starting Date** field.

  You can also click to select a date from the Calendar picker.
- Select a new location (Event Alerts only).

5 Click **Submit**. The page refreshes with the updated bucket information.

Any changes made here to the bucket information are only temporary: once you leave the alert page or the Supply/Demand tab, the bucket information will revert back to its default values.

Viewing Bill of Materials Information

The BOM button on the Supply/Demand tab allows you to easily view bill of materials information for the item/location combination that triggered the alert in a separate pop-up window that works the same way as the Supply Networks page. The difference is that the Item and Location are pre-selected based on the data in the alert.

For more information, see “Supply Networks” on page 35.

Reading Notes

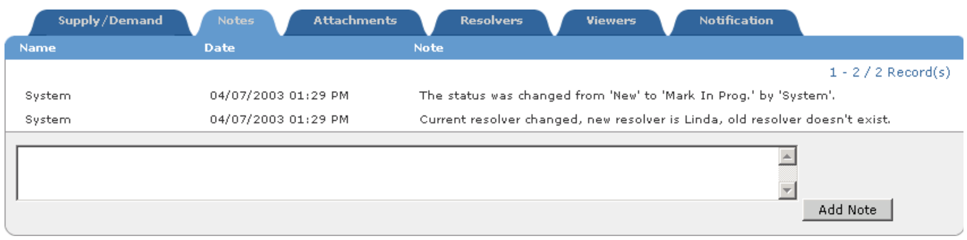
Notes are automatically generated for an alert when changes are made to an alert, changes such as a status change, a severity change, a resolver action, or a new resolver. The notes help you track an alert's progress.

Any user who has subscribed to an alert can read the notes for that alert.

To read an alert's notes

1 View the detail page of the alert that contains the notes you want to read. (See "Viewing Alerts" on page 12.)

2 In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Notes** tab.



The notes are listed in chronological order with the newest on top.

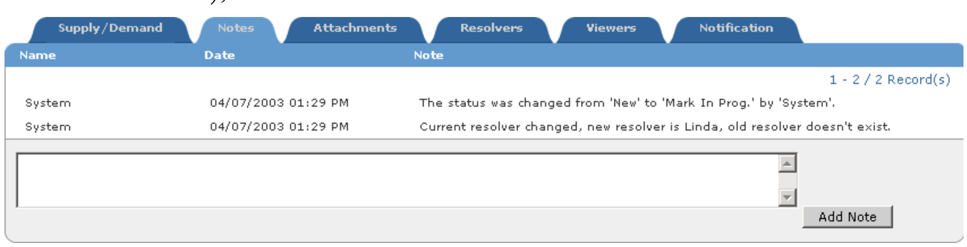
Adding Notes

Any user who has subscribed to an alert can add their own notes to an alert, perhaps to add additional information to an action that you took on the alert.

To add a note to an alert

1 View the detail page of the alert that contains the notes you want to read. (See "Viewing Alerts" on page 12.)

2 In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Notes** tab.



3 In the blank text box, type the text of your note.

4 Click **Add Note**.

The Notes list will refresh, adding the new note to the top of the list.

Viewing Attachments

Any user who has subscribed to an alert can view files attached to that alert.

Note: To view an attached file, you must have the program capable of opening the file installed on your computer.

To view an attachment

1. View the detail page of the alert that contains the attachment you want to view. (See "Viewing Alerts" on page 12.)
2. In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Attachments** tab.

3. Click the **Download** link for the attachment you want to view.

   If a File Download dialog box appears, click **Open**.

Adding Attachments

Only alert resolvers can add attachments.

To add an attachment

1. View the detail page of the alert that you want to add an attachment to. (See "Viewing Alerts" on page 12.)
2. In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Attachments** tab.

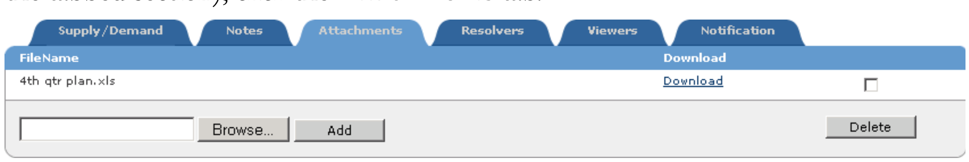
3. Click **Browse**. The Choose file dialog box appears.
4. Navigate to the folder on your computer that contains the file you want to add, select the file, then click **Open**.
5. Click **Add**.

Deleting Attachments

Only alert resolvers can delete attachments.

To delete an attachment

1. View the detail page of the alert that contains the attachment you want to delete. (See "Viewing Alerts" on page 12.)
2. In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Attachments** tab.



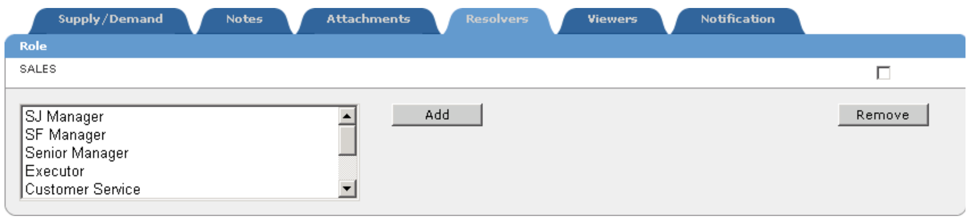
3. Select the checkbox is the right column of the attachment you want to delete.
4. Click **Delete**.

Viewing Resolvers

The Resolvers tab lists the roles that are authorized to resolve the alert based on the alert definition.

To view resolvers

1. View the detail page of the alert that contains the resolvers you want to view. (See “Viewing Alerts” on page 12.)
2. In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Resolvers** tab.



The roles that can resolve the alert are listed in the top (white) section.

Adding Resolvers

Only resolvers can add roles to the resolvers list of an alert. Resolvers are added by role.

To add resolvers

1. View the detail page of the alert that contains the resolvers you want to add. (See “Viewing Alerts” on page 12.)
2. In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Resolvers** tab.

3. In the left-hand list, select one or more roles. (To select multiple roles, hold down the CTRL key while clicking.)
4. Click **Add**. The page refreshes and the selected roles are added to the resolver list.

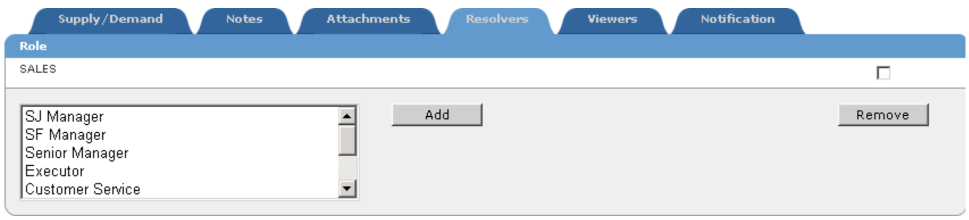
Removing resolvers

Only resolvers can remove roles from the resolvers list of an alert. Resolvers are remove by role.

To remove resolvers

1 View the detail page of the alert that contains the resolvers you want to remove. (See "Viewing Alerts" on page 12.)

2 In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Resolvers** tab.



3 Select the checkbox for the resolver role(s) you want removed.

4 Click **Remove**.

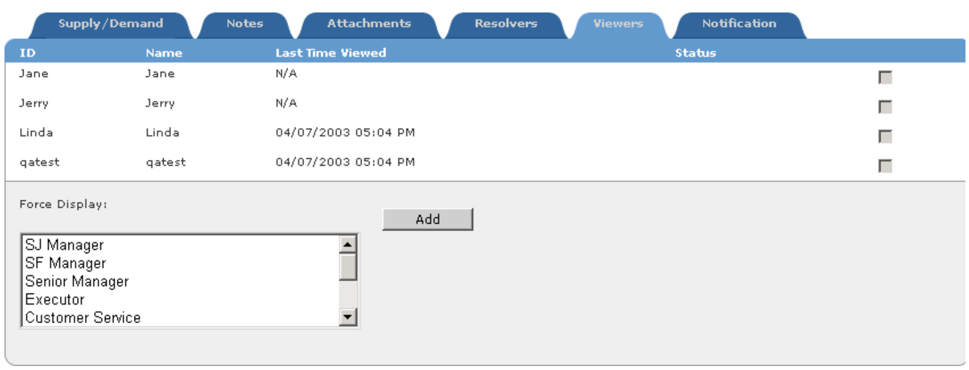
Viewing Viewer Information

The Viewers tab lists all users who are authorized to view the alert and the last time each user has viewed it (or N/A if not viewed by the user).

To view viewer information

1 View the detail page of the alert that contains the viewers you want to view. (See "Viewing Alerts" on page 12.)

2 In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Viewers** tab.



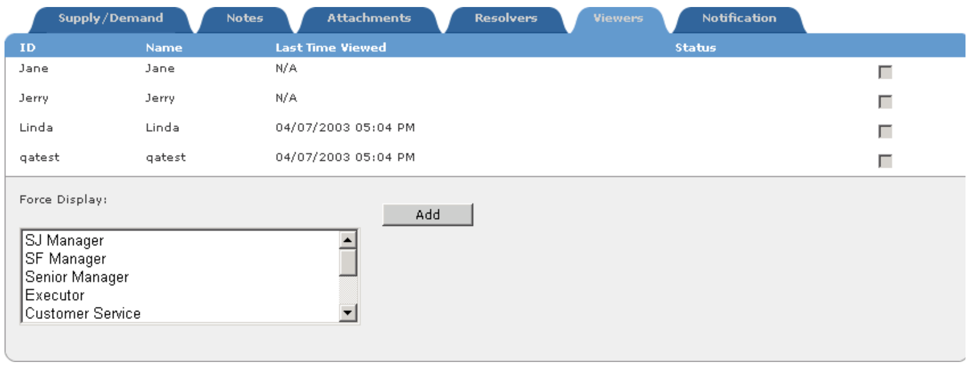
The list shows the ID, name, and last time viewed for each user authorized to view the alert.

Adding Viewers

Viewers are added to alerts by role. Only alert resolvers can add roles to the viewer list.

To add viewer roles

1. View the detail page of the alert that contains the viewers you want to add. (See "Viewing Alerts" on page 12.)
2. In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Viewers** tab.



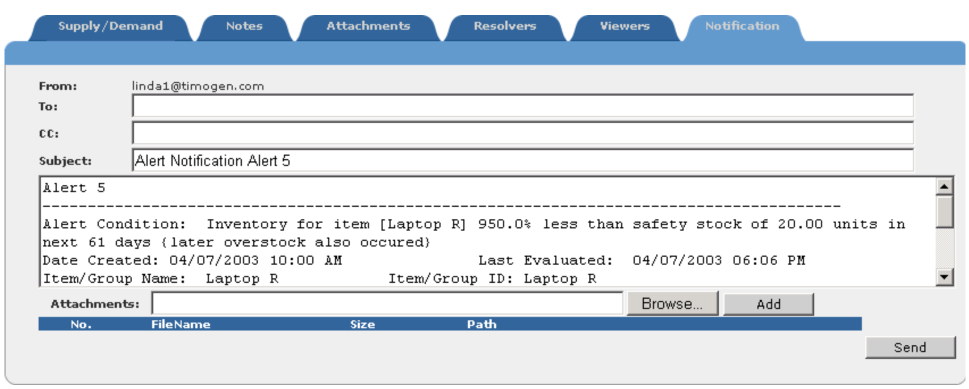
3. In the Force Display list, select one or more roles. (Hold down the CTRL key when clicking to select more than one.)
4. Click **Add**. Any users who have the selected role(s) and are not already viewers of the alert will be added to the viewer list.

Sending Notifications

Notifications are email messages with information about alerts sent from the Timogen Adaptive Controller system to anyone with an email address. The default text of the email message is the essential information about the alert, the information in the Alert Summary Pane.

To send a notification

1. View the detail page of the alert that you want to send a notification about. (See "Viewing Alerts" on page 12.)
2. In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Notification** tab.



3 Enter a valid email address in the **To** field.

   To enter multiple email addresses, enter each once separated by a comma (,) with no spaces.

4 If you want to add an attachment, click Browse, navigate to the folder on your computer that contains the file you want to add, select the file, click **Open**, then click **Add.**

5 Click **Send**.

Manual Alerts

Sometimes problems occur or events happen that the Timogen Adaptive Controller system cannot detect (or has not yet detected). You can enter alerts manually to track the problem. Manual alerts do not gather information from the system, so the system cannot offer suggested resolutions.

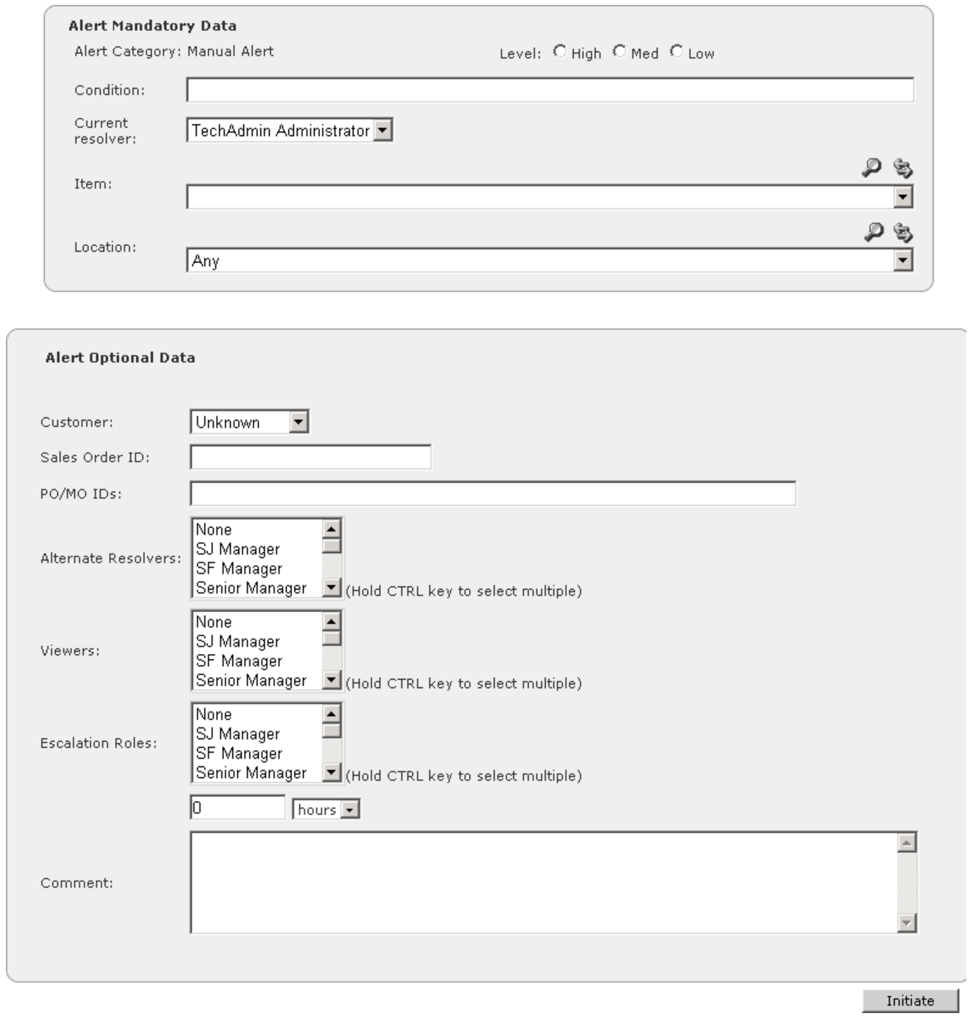
The only type of manual alert that can be created is an Event Alert.

Creating Manual Alerts

To create a manual alert

1 Click the **Visibility** tab, then click **Event Alerts**.

2 Click **Initiate Manual Alert**. The Create Manual alert page appears.



3 Enter the alert information. Certain alert information is mandatory, while some is optional. The mandatory information includes:

Field Name	Description
Level	Specify the level of the alert here. This can be: • High • Med (medium) • Low
Condition	Enter the brief description of the condition that has caused this Alert.
Item	The ID of the item that is the subject of the alert.
Location	The location of the monitored event.

The optional information includes:

Field Name	Description
Customer	Enter the name of the affected customer.
Sales Order ID	Enter the Sales Order ID.
PO/CMPO/ MO IDs	Enter the other ID details here.
Alternate Resolvers	Select the Alternate Resolvers for this Alert.
Viewers	Specify the roles of people who can view this Alert.
Escalation Roles	Specify the roles of the people to whom this Alert can be escalated.
Escalation Interval	The period after which the Alert must be escalated.
Comment	Enter any comments in this field.

4 Click **Initiate**.

Updating Alert Information

Manual and external alerts aren't generated by the Timogen Adaptive Controller system, so any information about these alerts must be updated manually.

To update alert information

1. Click the **Visibility** tab, then click **Event Alerts**.
2. In the event alert list, click the ID link for an manual or external alert. These alerts are identified by the words "Manual Alert" or "External Alert" in the alert's Condition text.
3. In the tabbed section at the bottom of the page (you may have to scroll down to see the tabbed section), click the **Update** tab.

4 Make any desired changes. Certain alert information is mandatory, while some is optional. The mandatory information that you can change includes:

Field Name	Description
Level	Specify the level of the alert here. This can be: • High • Med (medium) • Low
Condition	Enter the brief description of the condition that has caused this Alert.

The optional information that you can change includes:

Field Name	Description
Customer	Enter the name of the affected customer.
Sales Order ID	Enter the Sales Order ID.
PO/CMPO/ MO IDs	Enter the other ID details here.
Comment	Enter any comments in this field.

5 Click **Save**.

3

Impact Nodes and Supply Networks

Impact Nodes

The Impact Nodes pages lists all the Impact Nodes you are subscribed to. (See "Impact Node Subscriptions" on page 89.) An Impact Node is the combination of a single item and a single location. When an item is mapped to a specific location, an Impact Node implicitly exists for that item/location.

Impact Nodes allow you to recognize shortage or overstock conditions for a specific item at a specific location even as multiple events are changing in the supply chain. "Alert" appears in the Status column of the Impact Node list if an alert is currently in effect for that Impact Node.

Before alerts can occur for Impact Nodes, the Business Admin user must define the alert definition for that Impact Node. See "Alert Definition" on page 99.

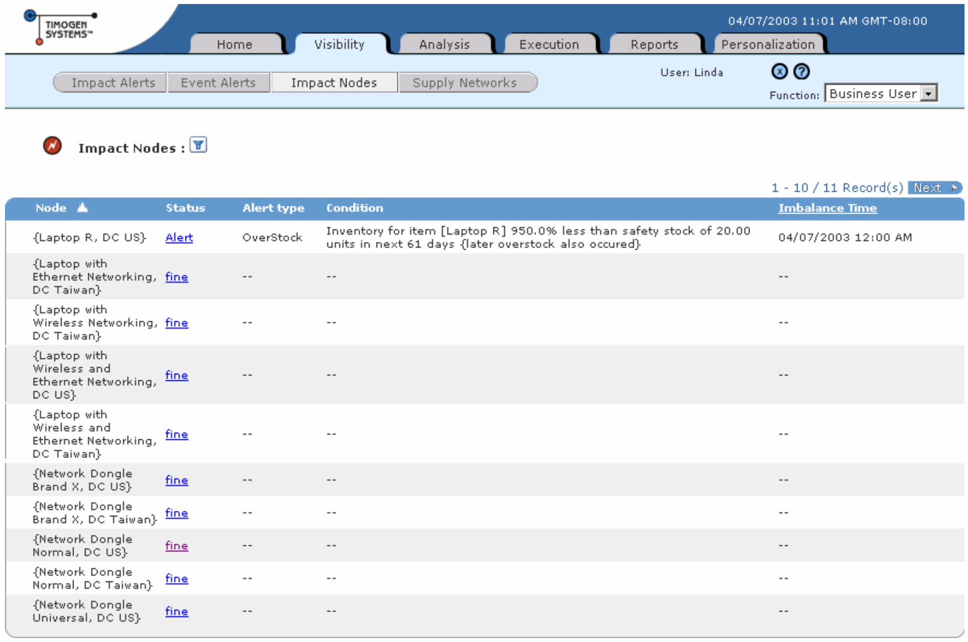
Viewing Impact Node Lists

Impact Nodes are shown as lists of records on the Impact Nodes list page. The list shows essential information about each record.

To view an Impact Node list

1 In the **Function** drop-down list, select **Business User**.
2 Click the **Visibility** tab.

3 Click **Impact Nodes**. The Impact Nodes list page appears.



The Impact Nodes list page contains the following information:

Field Name	Description
Node	This is the Impact Node - Item + Location combination.
Status	The status of this Impact Node. This can be: • Fine - Has no related Impact Alerts • Alert - Has active Impact Alerts
Alert Type	The type of Alert. This can be: • Overstock • Shortage
Condition	An explanation of the condition that caused the Alert.
Imbalance Time	The date and time of the earliest overstock/shortage.

Click on a Status link to go view detailed information about that Impact Node on its Supply Network page. For more information, see “Supply Networks” on page 35.

Click on a column header that is a link (underlined) to sort the records by the contents of that column. You can also filter the contents of the list to view a subset of the records.

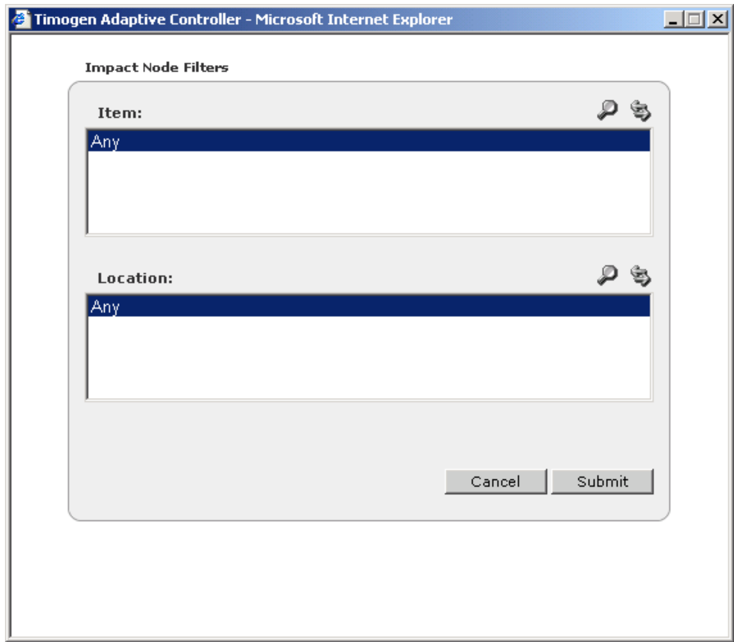
Note: You can view only the Impact Nodes you’ve subscribed to. For more information on subscribing to Impact Nodes, see “Impact Node Subscriptions” on page 89.

Filtering Impact Node Lists

The default view for Impact Node lists is to view all that you've subscribed to. If the list is long, it is separated into pages. You can filter any list to make it shorter and easier to find the records you are interested in.

To filter an Impact Node list

1. View the Impact Node list. (See "Viewing Impact Node Lists" on page 33.)
2. Click . The Impact Node Filters dialog box appears.



3. Select the filter criteria by selecting one or more items in each of the Item and Location lists. To select multiple items, hold down the CTRL key while clicking.

Note: To view more records in the Items and Locations lists, click , then find and select one or more Items and Locations.

4. Click **Submit**.

Supply Networks

The Supply Networks page provides information about your inventory items and their components at any location. You can view information about Impact Nodes (item/location pairs) along your supply chain, showing a Supply Demand View (SDV) that allows you to see the state of the Impact Nodes and navigate the Bill of Materials (BOM) between the Impact Nodes.

Each Impact Node is associated with a balance sheet that displays the following information over multiple buckets:

- Beginning Inventory
- Inflows
- Outflows
- Ending Inventory

The Material Network View (MNV) is a tree structure that shows BOM and Where Used relationships between Inventory Items and their components. The MNV displays a tree structure with a BOM expansion for the Item and the location in which the Item is used.

The Supply Networks page contains the following panes:

- Selection Pane - Shows what Direction, Item, Location, Effective Date, Version, and BOM were selected. Note: Version and BOM are not shown with Where Used.
- Tree Pane - This is the MNV which shows the BOM explosion or the Where Used explosion.
- Display Pane - This pane shows the following:
  - Supply Demand View - Shows Beginning and Ending Inventory, Inflow and Outflow, and Safety Stock levels for the time buckets.
  - Supplier View - Lists the supplier details
  - Node View - Lists the affected Impact Node details.

Inventory Item Supply/Demand Information

You can use Timogen Adaptive Controller to track the supply and demand of your inventory Items at any or all locations along your supply chain. The Supply Networks page shows the critical inflow and outflow information for inventory Items over future time buckets.

For inventory Items, you can view the BOM (the Item and any tracked components) or where used (the Item and the produced Items it goes into).

Viewing Inventory Item BOM Supply/Demand Information

To view inventory Item BOM Supply/ Demand information

1. In the **Function** drop-down list, select **Business User**.
2. Click the **Visibility** tab.
3. Click **Supply Networks**.
4. Select **BOM Components**.
5. From the **Item** drop-down list, select an Item.

   Note: To view more records in the Items list, click , then select the Item.

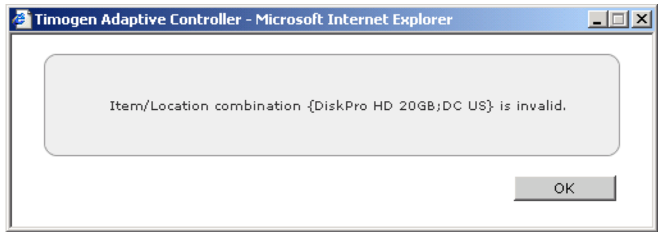
6. From the **Location** drop-down list, select a single Location (or All if you want to use all locations).

   Note: To view more records in the Locations list, click , then select a Location.

7. Optionally enter an **Effective Date** (in MM/DD/YY format) or click and select a date that will be the date of the first time bucket in the Supply/Demand view.
8. Optionally enter a **Version**, a pattern to be used to filter the Version property of a BOM.

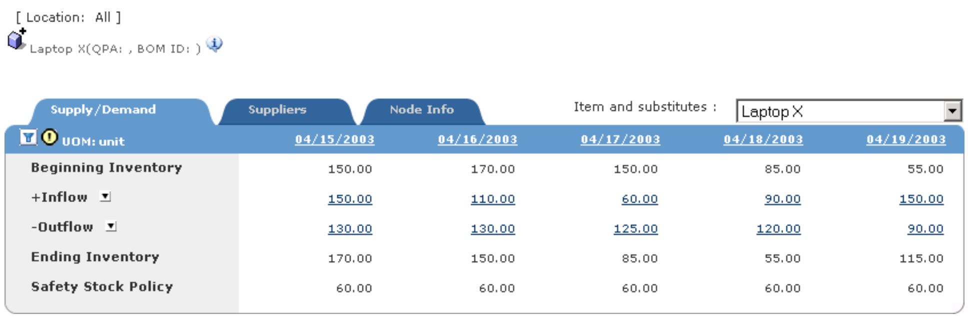
9 Click **Search**.

Note: If you select an Item/Location pair that does not exist (the selected Item is not at the selected Location), you'll see an error message:



Select a different Item or Location, then click **Search** again.

10 If there is more than one BOM, select one from the BOM drop-down list, then click **Submit**. The Tree and Display panes appear.



UOM: unit	04/15/2003	04/16/2003	04/17/2003	04/18/2003	04/19/2003
Beginning Inventory	150.00	170.00	150.00	85.00	55.00
+Inflow	150.00	110.00	60.00	90.00	150.00
-Outflow	130.00	130.00	125.00	120.00	90.00
Ending Inventory	170.00	150.00	85.00	55.00	115.00
Safety Stock Policy	60.00	60.00	60.00	60.00	60.00

In the Tree and Display panes, you can view comprehensive information about inventory at the Impact Node(s):

- If the box next to an Inventory Item in the tree view has a + next to it ( ), it means that the Item uses component Items. Click the + to expand the tree and view the component Items.
- Click to view information for that Item in the Display pane (the Supply/Demand, Suppliers, and Node Info tabs).
- If an item has a substitute, you can select that substitute to view its inventory information in the Display pane.
- Click in the Display pane to change the number of time buckets displayed or the date for the first time bucket.
- Hover the mouse pointer over to view information about when information about the Item was last updated from the ERP system.
- Click next to Inflow in the Supply/Demand tab to view Purchase Order (PO), Manufacturing Order (MO) and Transfer In information about the Item and click next to each of those to view Plan, Actual, and Resolution numbers.

  Click any number link to view details about that transaction.
- Click next to Outflow in the Supply/Demand tab to view Sales Demand, Dependent Demand, and Transfer Out information about the Item and click next to each of those to view Plan, Actual, and Resolution numbers.

  Click any number link to view details about that transaction.

- Click the Suppliers tab to view detailed information about suppliers for the Item.

Supply/Demand | Suppliers | Node Info — Item and substitutes : Laptop X

Supplier	Part No	Cost	UOM	C.F. UOM	Lead Time	Lot Size	Inc. Order Qty	Facility
Dachi Suzhou	Laptop X	40.0	set		6.0	null	1.0	DC US
Dachi Suzhou	Laptop X	40.0	set		6.0	null	1.0	DC Taiwan

- Click the Node Info to view detailed information about Locations.

Supply/Demand | Suppliers | Node Info — Item and substitutes : Laptop X

Facility	Buyer Code	Planner Code	Hub Inventory (In Transit/On Hand)	Safety Stock	Inv. Policy	Repl. Rule
Comdel Taipei	8	8	40.0 (0.0 / 40.0)	20.0	for safety stock 20	FIFO
DC US	16	16	131.8 (101.8 / 30.0)	20.0	for safety stock 20	FIFO
DC Taiwan	16	16	60.0 (30.0 / 30.0)	20.0	for safety stock 20	FIFO

Viewing Inventory Item Where Used Supply/Demand Information

To view inventory Item Where Used Supply/ Demand information

1. In the **Function** drop-down list, select **Business User**.
2. Click the **Visibility** tab.
3. Click **Supply Networks**.
4. Select **Where Used**.
5. From the **Item** drop-down list, select an Item.

Note: To view more records in the Items list, click , then select the Item.

6. From the **Location** drop-down list, select a single Location (or All if you want to use all locations).

Note: To view more records in the Locations list, click , then select a Location.

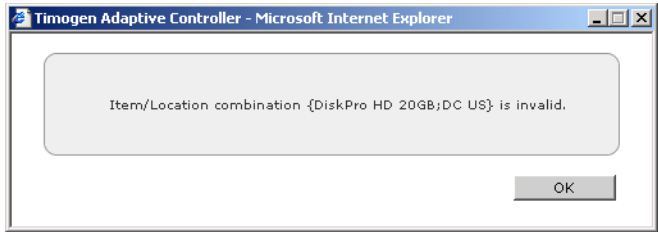
7. Optionally enter an **Effective Date** (in MM/DD/YY format) or click and select a date that will be the date of the first time bucket in the Supply/Demand view.
8. Click **Submit**. The Tree and Display panes appear.

[Location: Comdel Taipei]
SmartCell CPU 1.8GHz(QPA: , BOM ID:)

Supply/Demand | Suppliers | Node Info — Item and substitutes : SmartCell CPU 1.8GHz

UOM: unit	04/15/2003	04/16/2003	04/17/2003	04/18/2003	04/19/2003
Beginning Inventory	20.00	-70.00	-40.00	-50.00	-50.00
+Inflow	0.00	120.00	80.00	0.00	0.00
-Outflow	90.00	90.00	90.00	0.00	0.00
Ending Inventory	-70.00	-40.00	-50.00	-50.00	-50.00
Safety Stock Policy	20.00	20.00	20.00	20.00	20.00

Note: If you select an Item/Location pair that does not exist (the selected Item is not at the selected Location), you'll see an error message:



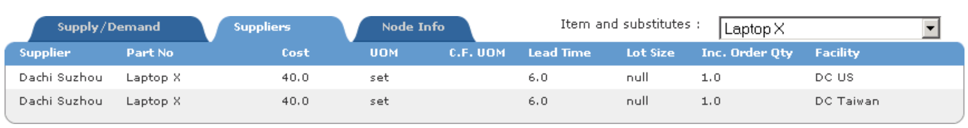
Select a different Item or Location, then click **Search** again.

In the Tree and Display panes, you can view comprehensive information about inventory at the Impact Node(s):

- If the box next to an Inventory Item in the tree view has a + next to it ( ), it means that the Item is a component of another produced Items. Click the + to expand the tree and view the produced Items.
- Click to view inventory information for that Item in the Display pane.
- If an item has a substitute, you can select that substitute to view its inventory information in the Display pane.
- Click in the Display pane to change the number of time buckets displayed or the date for the first time bucket.
- Hover the mouse pointer over to view information about when information about the Item was last updated from the ERP system.
- Click next to Inflow in the Supply/Demand tab to view Purchase Order (PO), Manufacturing Order (MO) and Transfer In information about the Item and click next to each of those to view Plan, Actual, and Resolution numbers.

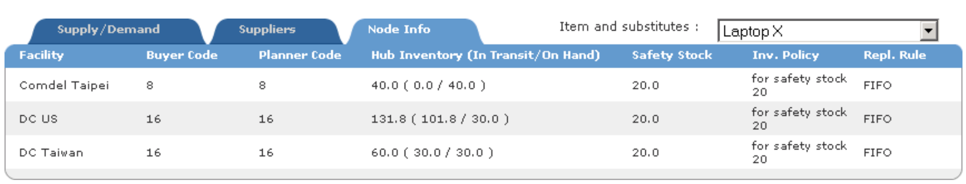
  Click any number link to view details about that transaction.
- Click next to Outflow in the Supply/Demand tab to view Sales Demand, Dependent Demand, and Transfer Out information about the Item and click next to each of those to view Plan, Actual, and Resolution numbers.

  Click any number link to view details about that transaction.
- Click the Suppliers tab to view detailed information about suppliers for the Item.



Supplier	Part No	Cost	UOM	C.F. UOM	Lead Time	Lot Size	Inc. Order Qty	Facility
Dachi Suzhou	Laptop X	40.0	set		6.0	null	1.0	DC US
Dachi Suzhou	Laptop X	40.0	set		6.0	null	1.0	DC Taiwan

- Click the Node Info to view detailed information about Locations.



Facility	Buyer Code	Planner Code	Hub Inventory (In Transit/On Hand)	Safety Stock	Inv. Policy	Repl. Rule
Comdel Taipei	8	8	40.0 (0.0 / 40.0)	20.0	for safety stock 20	FIFO
DC US	16	16	131.8 (101.8 / 30.0)	20.0	for safety stock 20	FIFO
DC Taiwan	16	16	60.0 (30.0 / 30.0)	20.0	for safety stock 20	FIFO

4

Analysis Sandbox

Sandboxes is a feature that allows you to scope problems and seek scoped resolutions for Impact Alerts. An Impact Alert is generated for one or more Impact Nodes and indicates a potential problem.

A sandbox, which may contain multiple Impact Nodes, helps you to view alerts and impacts, scope and analyze the problems, collaborate with other users, and find possible resolutions. The Analysis option allows you to manage the selection and lifecycle of the sandboxes and to compare sandboxes that represent different scope and solutions of a problem.

The sandboxes you can view and use depend on whether:

- You are the owner
- You are a participant (have been invited by the owner)

Viewing Sandboxes

Sandboxes are viewed in the Analysis tab. The sandbox list shows basic information about all the sandboxes you can view. A sandbox detail page shows all the sandbox information.

To view the sandbox list

1. In the **Function** drop-down list, select **Business User**.
2. Click the **Analysis** tab.
3. Click **Sandboxes**. The Sandboxes list page contains the following information about sandboxes:

Field Name	Description
ID	The internal ID of the sandbox.
Name	The name of the sandbox.
Description	A description of the purpose (problem, scope, goals etc), of the sandbox.
Scope Node(s)	The Impact Node(s) in the scope of the sandbox. If the text is blue and ends with an ellipsis (...), hover your mouse pointer over the text to see more information.

Field Name	Description
Collaborative	Indicates whether this is a collaborative sandbox. A Collaborative sandbox is a sandbox that has more than one owner/resolver.
Status	The current status of the sandbox. This can be: • Active • In Progress • Plan Generating • Plan Executed
Type	The sandbox type. This can be: • Regular - Created to solve a problem from an Impact Alert. There are no extra simulation data to consider and the resulting resolution plan can be executed. • Simulated - Used in a what if analysis. You can model data to see how potential changes to demand or forecast would affect the supply chain. This simulation data is added on top of the existing data and a resolution plan can be generated. But this resolution plan cannot be executed. The type of sandbox is fixed at creation time and cannot be changed.
Last Accessed	The last time the sandbox was accessed.

To view sandbox details

1. In the **Function** drop-down list, select **Business User**.
2. Click the **Analysis** tab.
3. Click **Sandboxes**. The Sandboxes list page appears.
4. Click the **ID** number of the sandbox you want to view. The Sandbox detail page contains the following information about the sandbox:

Field Name	Description
Description	A description of the sandbox.
Triggering Node	Indicates the Impact Node (Item + Location) that has triggered the sandbox.
Imbalance Time	The date and time at which the imbalance occurred.
Fill Rate	The demand fulfillment ratio within the scope of the sandbox. It is the ratio of the fulfillment of projected demand over actual demand within the scope.
Revenue	The total revenue of demand items within the scope.
Profit	The total revenue minus the total cost within the scope of the demand items.
Cost	The total cost of meeting the demand within the scope.

Field Name	Description
Status	The current status of the sandbox. This can be: • Active • In Progress • Created • Adjust_NP • Adjust_WP • Plan_Generated • Plan_Executed
Sandbox Type	The type of sandbox - Regular or What If.
Created	The date and time the sandbox was created.
Last Accessed	The date and time the sandbox was last accessed.
Plan Generated	The date and time the resolution plan was generated.
Plan Executed	The date and time the resolution plan will be executed.
Owner	Initially the owner is the creator of the sandbox. Ownership can be transferred to any participant. At any given time, there can be only owner for a sandbox. The owner can: • View the sandbox • Modify the configuration and add/remove participants • Invite participants for collaboration • Add notes to the sandbox • Approve tasks of a Resolution Plan within his / her privilege • Transfer ownership of a sandbox to a participant • Generate Resolution Plans, perform Impact and What If Analysis • Execute a Resolution Plan

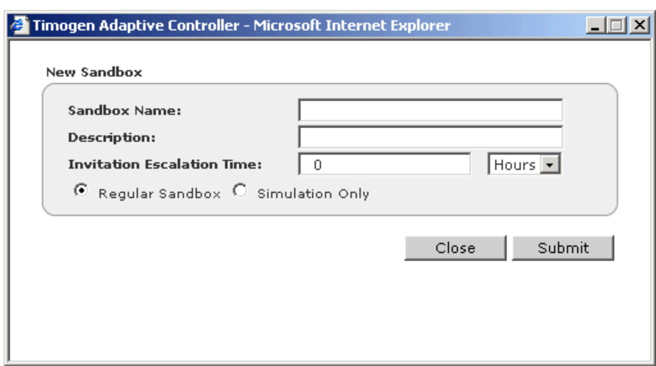
Field Name	Description
Participants	The participants for the sandbox. The owner can include other users as participants and ask them for a collaboration. A participant can have the following statuses: • **Invited**: The owner has sent the participant a message and has asked for a response within the specific period but the participant has not yet responded. • **Active**: When the participant views the sandbox where the request was generated, the status of the participant automatically changes to **Invited**. • **Escalated**: If the participant does not respond to the owner's request within the specified period, the status of the participant automatically changes to **Escalated**. A participant can do the following: • View the sandbox • Add notes to the sandbox • Approve/modify tasks of a Resolution Plan.
Escalation Interval	The period before which the status of the participant changes from Invited to Escalated.

Creating Sandboxes

You can create a new sandbox and specify the impact nodes that can use this sandbox to resolve alerts. You can create a new sandbox directly from an Impact Alert or you can create a sandbox with defined attributes that will be used for any alerts generated at specified Impact Nodes.

To create a sandbox

1. In the **Function** drop-down list, select **Business User**.
2. Click the **Analysis** tab.
3. Click **Create New Sandbox**. The New Sandbox dialog box appears.

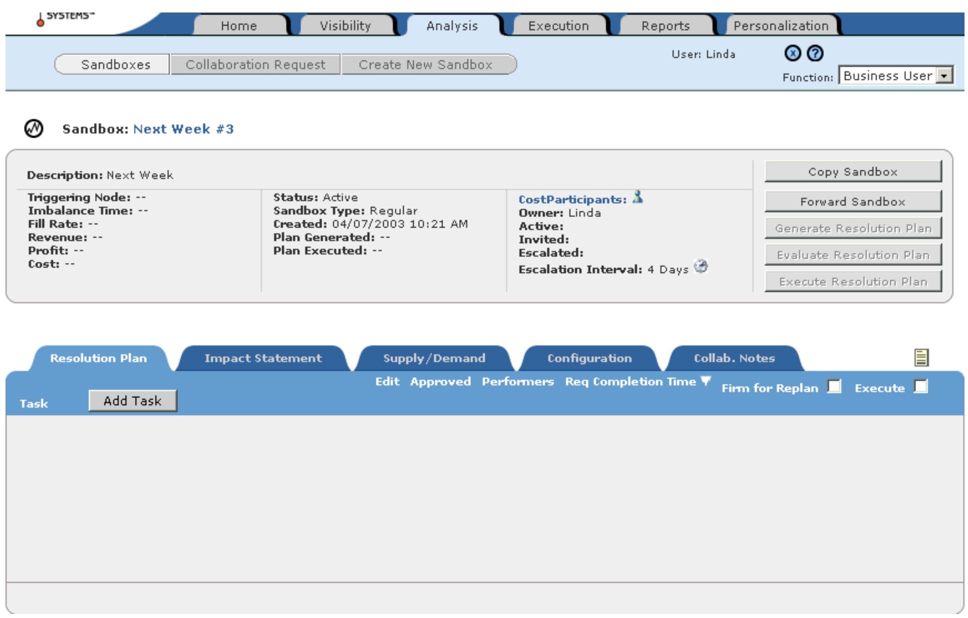


4 Enter the basic sandbox information.

Field Name	Description
Sandbox Name	Enter a unique name for the sandbox.
Description	Enter a brief description for the sandbox.
Escalation Interval	Enter a number for the escalation interval and then choose hours or days. The escalation interval is the amount of time after an alert is generated before it is escalated if it is not resolved.
Type	Specify the type of the sandbox. This can be: • **Regular Sandbox** - This sandbox is used to solve an Impact Alert. No extra simulation information is considered and the resulting resolution plan can be executed. • **Simulation Only** - This sandbox is used in a what if analysis. You can model data to see how potential changes to demand or forecast would affect the supply chain. This simulation data is added on top of the existing data and a resolution plan can be generated, but not executed.

5 Click **Submit**.

6 Click **OK** in the confirmation dialog box. The Sandbox page appears.



This page is divided into two panes:

- The top pane contains details about the selected sandbox and provides buttons to perform operations on the sandbox
- The lower pane contains tabs that allow you to define the problem configuration, add tasks and generate the Resolution Plan.

The sandbox now exists, but it is essentially "blank," that is, it can't be used to solve an alert. To use a sandbox, you must first configure it.

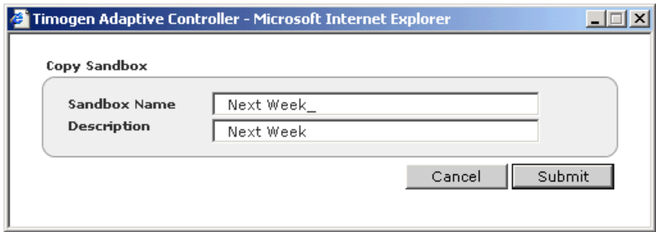
Copying Sandboxes

You can create exact copies of a sandbox. A sandbox copy can be useful if you want to make one or two changes, then compare the resolution to the original. (See "Comparing Sandboxes" on page 52.)

To copy a sandbox

1 View the sandbox you want to copy. (See "Viewing Sandboxes" on page 41.)

2 Click **Copy Sandbox**. The Copy Sandbox dialog box appears.



The Sandbox Name and Description fields are already filled in, copying that of the existing sandbox with the exception that the sandbox Name appends an underscore (_).

3 If desired, enter a new Sandbox Name and Description.

4 Click **Submit**.

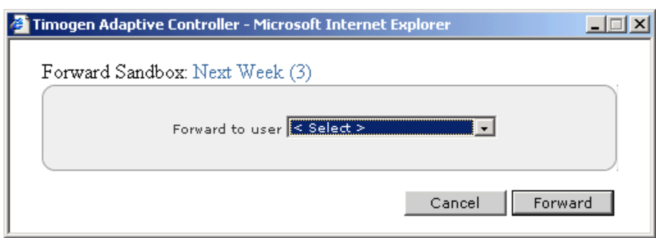
Forwarding Sandboxes

You can forward a sandbox to another Timogen Adaptive Controller user. Forwarding transfers ownership to that user.

To forward a sandbox

1 View the sandbox you want to forward. (See "Viewing Sandboxes" on page 41.)

2 Click **Forward Sandbox**. The Forward Sandbox dialog box appears.



3 In the **Forward to user** drop-down list, select a username.

4 Click **Forward**.

5 In the confirmation dialog box, click **OK**.

Deleting Sandboxes

A sandbox can be deleted by the owner only if:

- No resolution plan generation request is pending
- The resolution plan has not yet been executed

To delete a sandbox

1. In the **Function** drop-down list, select **Business User**.
2. Click the **Analysis** tab.
3. Click **Sandboxes**.
4. Click for the sandbox you want to delete.
5. In the confirmation dialog box, click **OK**.

Configuring Sandboxes

Configuring a sandbox includes:

- Selecting a Problem Configuration Template
- Defining a Resolution Plan
- Defining scope
- Defining business goals
- Defining constraints

You can view a sandbox configuration summary at any time.

To view a sandbox configuration summary

1. View a sandbox. (See "Viewing Sandboxes" on page 41.)
2. Click the **Configuration** tab in the lower pane, then click **Summary**.

Selecting Problem Configuration Templates

A Problem Configuration Template contains a set of actions that can be used to resolve an alert. These templates are defined by the Business Admin user. For more details on the templates, see "Problem Configuration Templates" on page 131.

To select a problem configuration template

1. View a sandbox. (See "Viewing Sandboxes" on page 41.)
2. Click the **Configuration** tab in the lower pane, then click **Template**.
3. Click the button in the **Load** column for the problem configuration template you want to use for this sandbox.

   Click on the name of the problem configuration template, to view its details.
4. Click **Load**.

Defining Resolution Plans

A Resolution Plan is a set of tasks that can be executed manually or automatically. Each Task is a single actual or planned purchase order (PO), manufacturing order (MO), or transfer order (TO). The Resolution Plan itself can be generated manually or by the Decision Engine.

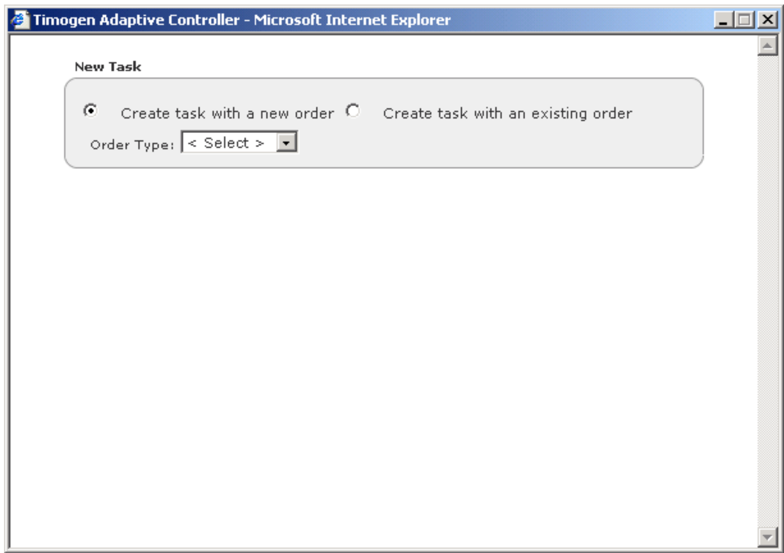
Each sandbox has a default Problem Configuration template that can be invoked by the Decision Engine. The Problem Configuration templates are set up by the Business Admin user. For more details on setting up the templates, refer to "Problem Configuration Templates" on page 131.

Adding Tasks

To add a task to a sandbox

1 View a sandbox. (See "Viewing Sandboxes" on page 41.)

2 Click the **Resolution Plan** tab in the lower pane, click **Add Task**. The New Task dialog box appears.



3 Select one of **Create task with an new order** or **Create task with an existing order**.

- A task with a new order: Select an Order Type, then enter Node, Quantity, Date, Supplier, Quantity UOM, Cost, and Currency, then click **Submit**.
- A task with an existing order: Select an Order Type, enter an Order ID or select a Node and click **Search**. A list of Impact Nodes meeting the search condition appears. Select the check boxes for the Impact Nodes you want to include, then click **Submit**.

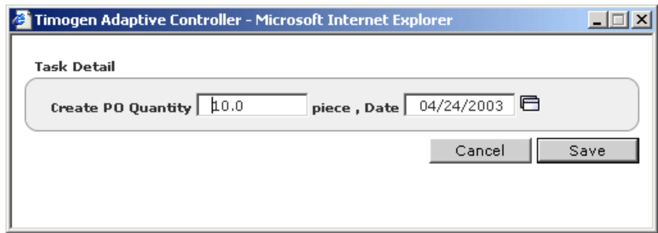
Editing Tasks

Editing tasks involves changing the quantity or date of the order in the task.

To edit a sandbox task

1 View a sandbox. (See "Viewing Sandboxes" on page 41.)

2 Click the **Resolution Plan** tab in the lower pane, click next to the task. The Task Detail dialog box appears.



3 Make any desired changes to the Quantity or the Date.

4 Click **Save**.

Defining Scope

Scope is where a sandbox can be used. When you define scope, you define a list of Impact Nodes. Any Impact Alerts that occur for the listed nodes can use the sandbox.

The scoping process establishes a group of impact nodes and how the relationship between them should be considered for solving one problem. The result of the scoping is the Problem Scope. The Decision Engine works on top of the problem scope.

If you use a pre-defined Problem Configuration template, the scope will initially have the same pre-defined setting. You can modify the template you have selected and configure the scope of the sandbox. The changes made to the template will be applicable only to your sandbox. Defining the scope consists of three steps:

Step 1: Specifying Additional Nodes Impact node refers to one location and item combination. The initial Impact Node set is the set of nodes that the scoping process starts with. You can include additional impact nodes here.

Step 2: Inclusion Strategy You can specify conditions for the impact nodes that you have selected.

Step 3: Selecting Impact Nodes You can select which Impact Nodes will be able to use this sandbox when an alert is generated.

To define scope for a sandbox

1 View a sandbox. (See "Viewing Sandboxes" on page 41.)

2 Click the **Configuration** tab in the lower pane, then click **Scope**.

3 In the **Impact Nodes** list, select one or more Impact Nodes (to select multiple nodes, hold down the CTRL key when clicking), then click .

Note: If the nodes you want to use are not in the Impact Nodes list, click , then in the Impact Node Selector dialog box, select one or more Items and Locations, click Search, and in the Search Results list (all valid Impact Nodes), select one or more Impact Nodes, then click Select.

4 Click . The Inclusion Strategy section appears.

5 Select conditions for the selected Impact Nodes:

- **Allow alternate locations**

  If this option is selected, all alternate locations for each initial impact node will be included in the Resolution plan.

  E.g.: If the selected Impact Node is **Laptop 200, San Jose**, Laptop 200 in all other locations such as Shanghai, Taiwan, etc will be included.

  ```
  Laptop 200, San Jose
  Laptop 200, Shanghai
  Laptop 200, Taiwan
  ```
  etc.

- **Include more nodes from supply-chain network**
  - **Where-used: Include ___ level(s)** If you select this option, other products that are produced by the initial impact node will be included. Specify the number of levels here. By default, 99 levels are included.

    For example, if the selected Impact Node is **Motherboard 113, San Jose**, laptops, desktops etc produced by the Motherboard 113 will be included.

    For example, if the selected Impact Node is **Chip 10, San Jose**, and the **Include level(s)** is **2,** other items in the supply chain containing the chip upto 2 levels will be included. So if the next level item after Chip 10 is Motherboard 113 and the secondary level item is Laptop 200, all these items will be included.

    ```
    Chip 10, San Jose -> Motherboard 113, San Jose ->
    Laptop 200, San Jose

    Chip 10, Shanghai -> Motherboard 113, Taiwan -> Laptop
    200, Taiwan

    Chip 10, Taiwan -> Motherboard 113, Shanghai -> Laptop
    200, Shanghai

    etc.
    ```

    - **Include Related Items:** This option will include other dependent items for newly included components.

      For example, if the selected Impact Node is Desktop 100, San Jose, then all other dependent items that are part of the BOM will be included.

    ```
    Desktop 100, San Jose -> Monitor 100, San Jose ->
    Motherboard 100, San Jose
    ```

    If the item is Desktop, and Monitor is also part of the BOM for the Desktop, it will also be included in addition to the MotherBoard.

  - **BOM Components: Include ____ levels** If you select this option, other components in the BOM can be included. Specify the number of levels here.
    - **Include Related Items:** Includes related items.

- **Allow substitutions**: If you select this option, the initial impact node can be substituted with other similar impact nodes.

- **Allow alternate suppliers**: This option will allow you to include alternate suppliers for the selected impact nodes.

  Consider all output items within scope that compete for the same capacities.

6. Click . The Problem Scope section appears.
7. Select the Impact Nodes where this sandbox can be used. (The default is all available Impact Nodes selected.)
8. Click **Save**.

Defining Business Goals

Business goal information helps drive optimal solutions. You can define your business goal priorities, including fill rate, revenue, profit, and cost.

To define business goals for a sandbox

1. View a sandbox. (See "Viewing Sandboxes" on page 41.)
2. Click the **Configuration** tab in the lower pane, then click **Business Goal**.
3. Enter weights for Fill Rate, Revenue, Profit, and Cost. The total must equal 100.

   Enter higher numbers for the business goals that are more important.
4. Click **Save**.

Defining Constraints

Constraints define the limits that Timogen Adaptive Controller stays within when calculating the best solution to an alert.

To define constraints for a sandbox

1. View a sandbox. (See "Viewing Sandboxes" on page 41.)
2. Click the **Configuration** tab in the lower pane, then click **Constraints**.
3. Select and enter the configuration information:

Field Name	Description
Resolution Horizon	Enter the number of days from the current time through which the Decision Engine should run. For example, if the Resolution Horizon is specified as 10 days and the current date is June 04, the Problem Configuration will be valid upto June 13.
Demand	Select a scope: • All Demands • Sales Orders Only
Order Types	Select the Order Types that must be included in the scope: • Allow TO Changes - Transfer Order changes are always allowed by default. • Allow PO Changes - When this field is turned off, no new POs will be generated. • Allow MO Changes • Allow Back Orders
Firm Plan Time Fence	Enter the number of days up to which no order changes should take place.
Capacity Constraints	Select if Capacity Constraints should be considered.
Lot Sizing	Select if the Lot Size rule must be considered.

Field Name	Description
Purchase Lead Time	Select the Purchase Lead Time from: • Standard • Standard & Expedite
Resolution Time Fence	Select the Resolution Time Fence from: • One week from today • Up to an entered date

4. Click **Save**.

Comparing Sandboxes

Timogen Adaptive Controller allows you to compare two sandboxes side-by-side so you can determine which one will work better for a particular situation.

To compare two sandboxes

1. In the **Function** drop-down list, select **Business User**.
2. Click the **Analysis** tab.
3. Click **Sandboxes**.
4. Click for the two sandboxes you want to compare. The ID numbers appear next to the Compare button at the bottom of the column.
5. Click **Compare**.

Collaborative Notes

Collaborative notes allow you to add text notes to a sandbox for anyone else who can view the sandbox to see.

Viewing Collaborative Notes

Collaborative Notes are viewed on the Sandbox detail page.

To view a collaborative note

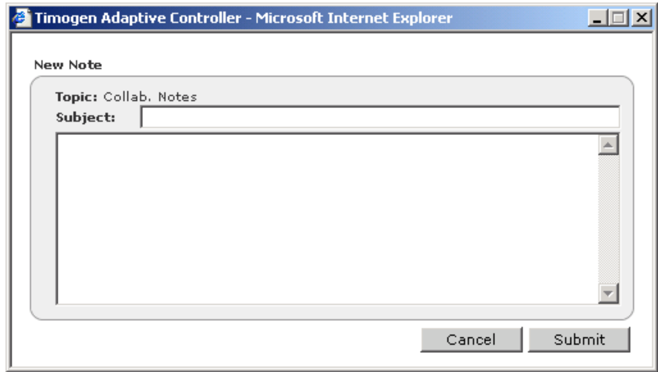
1. View a sandbox. (See "Viewing Sandboxes" on page 41.)
2. Click the **Collab. Notes** tab in the lower pane.
3. Click a **Subject** link.

Adding Collaborative Notes

Adding Collaborative Notes

1. View a sandbox. (See "Viewing Sandboxes" on page 41.)
2. Click the **Collab. Notes** tab in the lower pane.

3 Click . The New Note dialog box appears.



4 Enter the **Subject** and note text. The text you enter in the Subject field will appear in the list of Collaborative Notes.

5 Click **Submit**.

Resolution Plans

Each sandbox contains a Resolution Plan, a set of tasks that can be executed manually or automatically.

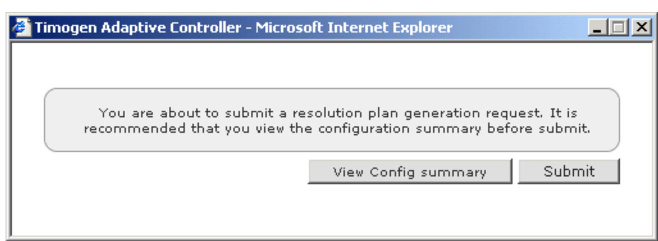
Generating Resolution Plans

When a sandbox is created from an alert, a Resolution Plan is generated automatically by Timogen Adaptive Controller based on the sandbox configuration. If you make changes to the configuration, or if you create a sandbox separate from an alert, you can generate a new Resolution Plan. For more information, see “Resolution Plans” on page 53.

To generate a Resolution Plan

1 View a sandbox. (See “Viewing Sandboxes” on page 41.)

2 Click **Generate Resolution Plan**. A message appears allowing you to view a summary of the sandbox configuration.



3 Click **Submit**.

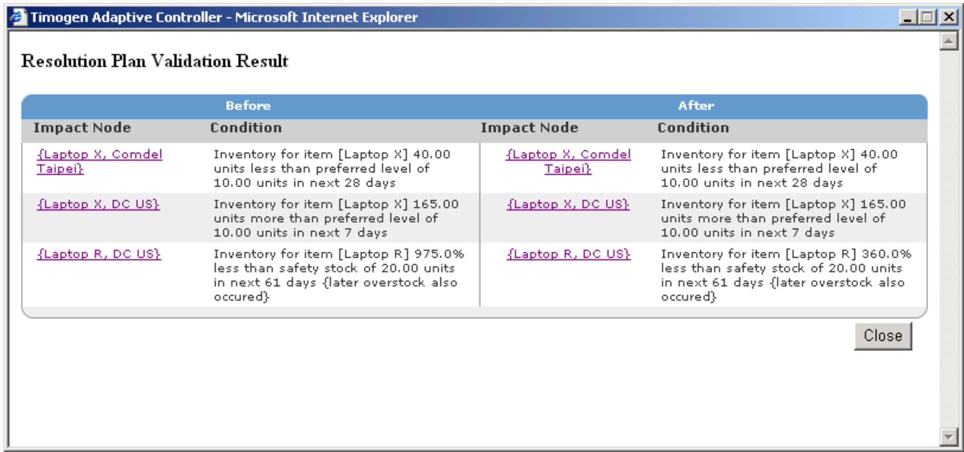
4 In the confirmation dialog box, click **OK**.

Evaluating Resolution Plans

You can validate the current Resolution Plan for execution feasibility.

To evaluate a Resolution Plan

1. View a sandbox. (See "Viewing Sandboxes" on page 41.)
2. Click **Evaluate Resolution Plan**. The Resolution Plan Validation Result dialog box appears.



The Resolution Plan Validation Result list shows a list of Impact Nodes in the sandbox scope and the condition of each. Click on an Impact Node link to see the Supply/Demand view for that Impact Node.

Executing Resolution Plans

After you have reviewed and evaluated the Resolution Plan, you can execute the plan. When the Resolution Plan is executed, the status of the Sandbox changes to 'View Only' and it cannot be modified. The result of the Resolution Plan is used to evaluate the impact alert and this plan is also used for future decision making activities.

To execute a Resolution Plan

1. View a sandbox. (See "Viewing Sandboxes" on page 41.)
2. Click **Execute Resolution Plan**.
3. In the confirmation dialog box, click **Yes**.

Impact Statements

An impact statement is the performance metrics for key performance indicators, including fill rate, revenue, profit, and cost. An impact statement also shows any fulfillment, inventory, or production issues. Review an impact statement to decide if changes need to be made to the Resolution Plan.

To view a sandbox impact statement

1. View a sandbox. (See "Viewing Sandboxes" on page 41.)
2. Click the **Impact Statement** tab.

You can do the following here:

Supply/Demand Views

The Supply/Demand tab lists Impact Nodes that can use the sandbox and whether an alert exists for that Impact Node. Click on an Impact Node name to see a Supply/Demand view for that Impact Node. A Supply/Demand View provides a projected view of inventory levels for the set of impact nodes (specified in the problem scope) charted over time. For more information about Supply/Demand views, see "Supply Networks" on page 35.

5

Execution

A Resolution Plan is the scoped solution generated by the Decision Engine with respect to the problem configuration inside a sandbox. For more details on Sandboxes and Problem Configuration, refer to "Analysis Sandbox" on page 41.

This chapter describes the following topics:

- "Tasks" on page 57
- "Resolution Process" on page 68
- "Messages" on page 68

Tasks

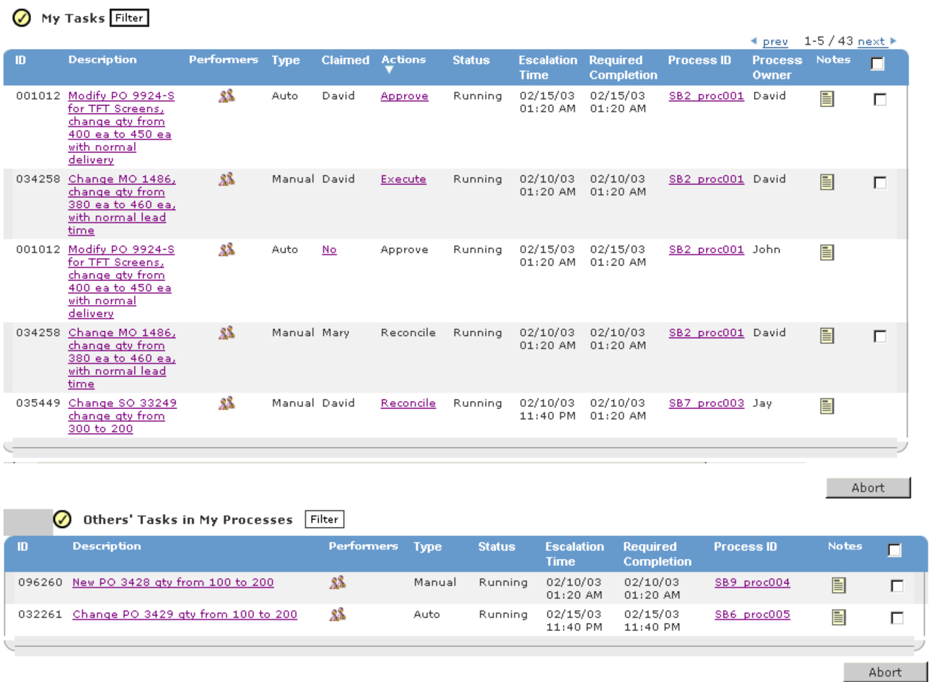
A Resolution Plan consists of a set of tasks and can be generated manually or by the Decision Engine. Each task has a unique number within a plan and consists of multiple resolution steps. These steps can be automated or they can be manual. A set of resolution tasks forms a Resolution Process Definition and this can be configured by the Business Admin user. For more details on setting up Resolution Process Definitions, refer to "Resolution Process Definitions" on page 129.

Tasks Page

The Tasks page lists:

- All Tasks that have been assigned to you
- Tasks assigned to others (but you are a participant of that Sandbox)

Select **Execution > Tasks** option. The following screen is displayed.


My Tasks Filter

prev 1-5 / 43 next

ID	Description	Performers	Type	Claimed	Actions	Status	Escalation Time	Required Completion	Process ID	Process Owner	Notes	
001012	Modify PO 9924-S for TFT Screens, change qty from 400 ea to 450 ea with normal delivery		Auto	David	Approve	Running	02/15/03 01:20 AM	02/15/03 01:20 AM	SB2_proc001	David		
034258	Change MO 1486, change qty from 380 ea to 460 ea, with normal lead time		Manual	David	Execute	Running	02/10/03 01:20 AM	02/10/03 01:20 AM	SB2_proc001	David		
001012	Modify PO 9924-S for TFT Screens, change qty from 400 ea to 450 ea with normal delivery		Auto	No	Approve	Running	02/15/03 01:20 AM	02/15/03 01:20 AM	SB2_proc001	John		
034258	Change MO 1486, change qty from 380 ea to 460 ea, with normal lead time		Manual	Mary	Reconcile	Running	02/10/03 01:20 AM	02/10/03 01:20 AM	SB2_proc001	David		
035449	Change SO 33249 change qty from 300 to 200		Manual	David	Reconcile	Running	02/10/03 11:40 PM	02/10/03 01:20 AM	SB7_proc003	Jay		

Abort

Others' Tasks in My Processes Filter

ID	Description	Performers	Type	Status	Escalation Time	Required Completion	Process ID	Notes	
096260	New PO 3428 qty from 100 to 200		Manual	Running	02/10/03 01:20 AM	02/10/03 01:20 AM	SB9_proc004		
032261	Change PO 3429 qty from 100 to 200		Auto	Running	02/15/03 11:40 PM	02/15/03 11:40 PM	SB6_proc005		

Abort

Field Name	Description
ID	Internal ID of the task.
Description	A description of the task is displayed here. Click on the Description to view the details.
Performers	The performers associated with this task. Click on the link to see the list of Approvers and Executors for this task. The Performers for a task are set by the Business Admin user. For more details, refer to the Business Administrator section.
Type	Indicates whether the task type is manual or automatic.
Claimed	Indicates if this task has been claimed. This prevents duplicate users from simultaneously operating on the same task. If a task has been claimed, the name of the user who has claimed it is displayed here. If a task has not been claimed, the status of the field is 'No' and the user can click on the link and claim the task.

Field Name	Description

Actions	This is the Action that needs to be taken for this task. This can be:
	• Approve / Disapprove
	• Execute. You can select
	  • With Auto Reconciliation: Enter a Reference No (Confirmation ID) to automatically reconcile with the ERP application.
	  • With Manual Reconciliation: You can modify the details of the task and manually execute it.
	• Reconcile with the ERP application. If you had selected Execute with Manual Reconciliation, you can specify whether the result from the ERP application was:
	  • Completed:
	  • Completed with Changes
	  • Rejected

Status	The current status of this task. This can be: • Running • Aborted • Completed
Escalation Time	If a task / resolution process is not handled within a specific period, the task will be escalated to the users belonging to the Escalation role. This field indicates the date and time after which an uncompleted task is escalated.
Required Completion	The date and time by which the task needs to be completed.
Process ID	Each task is part of a Resolution Plan which is generated from a Sandbox. The internal ID of the sandbox resolution process is displayed here. Click on the Process ID link to view the Resolution Process for this sandbox.
Process Owner	The owner of the resolution process. The owner is also the owner of the Sandbox where the Resolution Plan was generated.
Notes	Click on the Notes icon to view Notes exchanged during approval, execution and reconciliation.

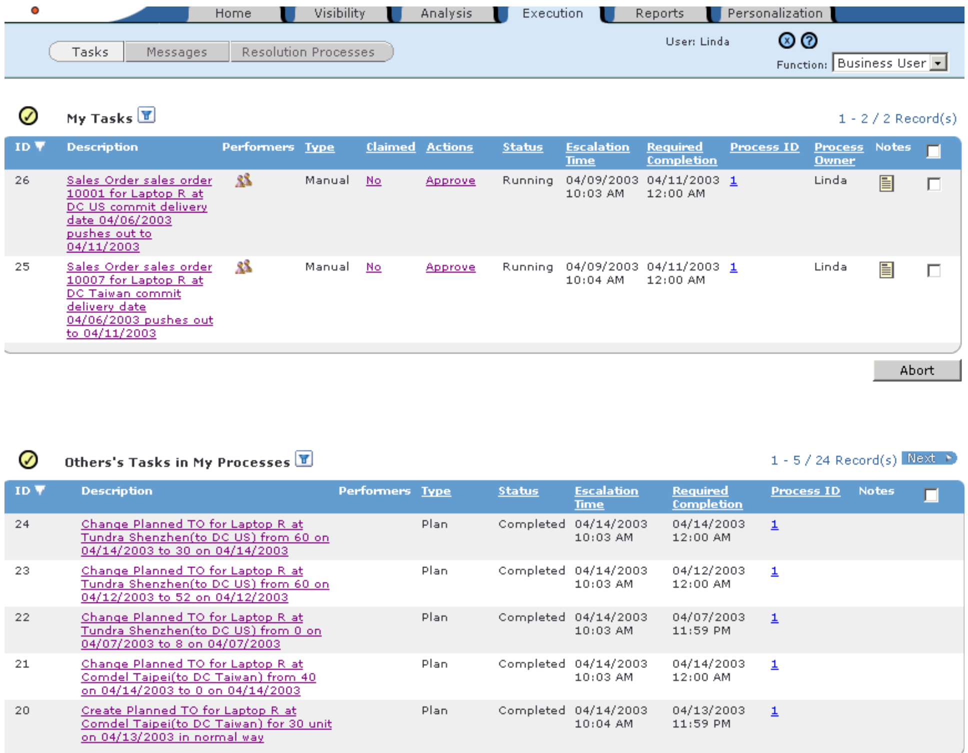
Claiming Tasks

Claiming a task is taking responsibility for its completion. For automatic tasks, this means following up to ensure the task is done. For manual tasks, this means performing the task, then entering the information in Timogen Adaptive Controller that the task has been done.

To claim a task

1 In the Functions drop-down list, select **Business User**.

2 Click the **Execution** tab, then click Tasks. The Tasks page appears.



3 In the Claimed column of the My Tasks list, click the **No** link of the task you want to claim.

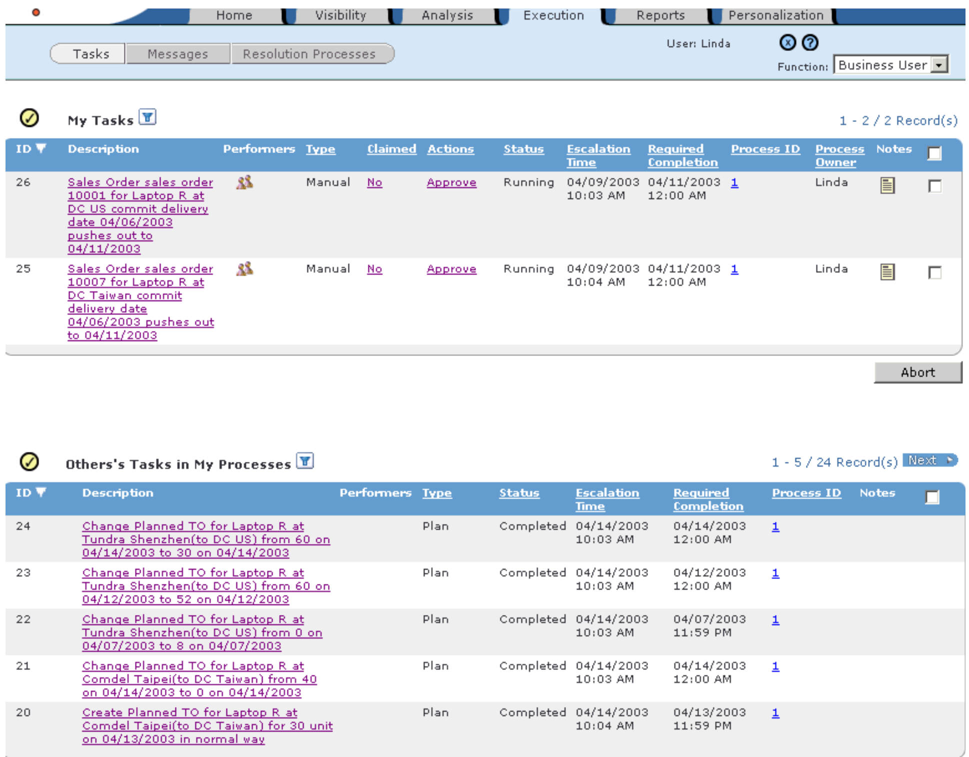
4 Click **Yes** in the confirmation dialog box.

Approving Tasks

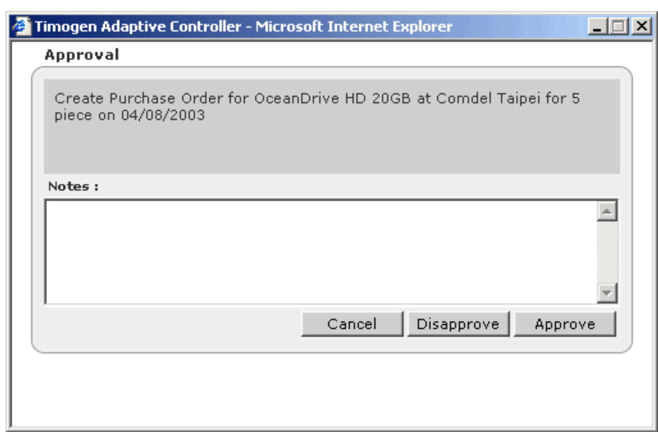
Some tasks require approval before they can be completed. If they do, an Approve link will appear in the Actions column.

To approve a task

1. In the Functions drop-down list, select **Business User**.
2. Click the **Execution** tab, then click **Tasks**. The Tasks page appears.



3. In the Actions column of the My Tasks list, click an **Approve** link. The Approval dialog box appears.



4. Review the tasks details, optionally enter a note, then click **Approve**.
5. In the confirmation dialog box, click **OK**.

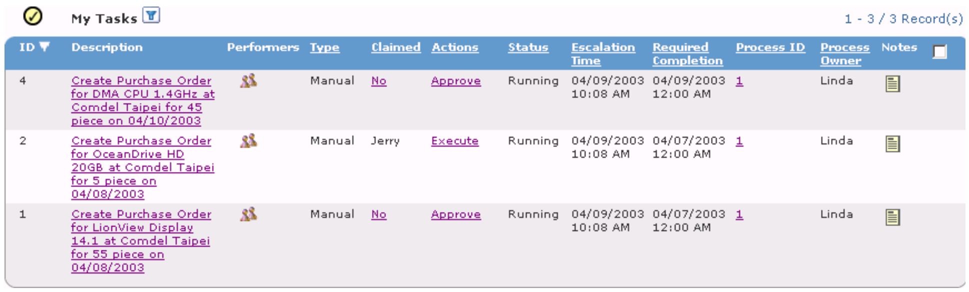
Executing Tasks

Once manual tasks have been approved, they must be executed. While that execution takes place outside the Timogen Adaptive Controller system, its completion should be recorded within the Timogen Adaptive Controller system.

To execute a task

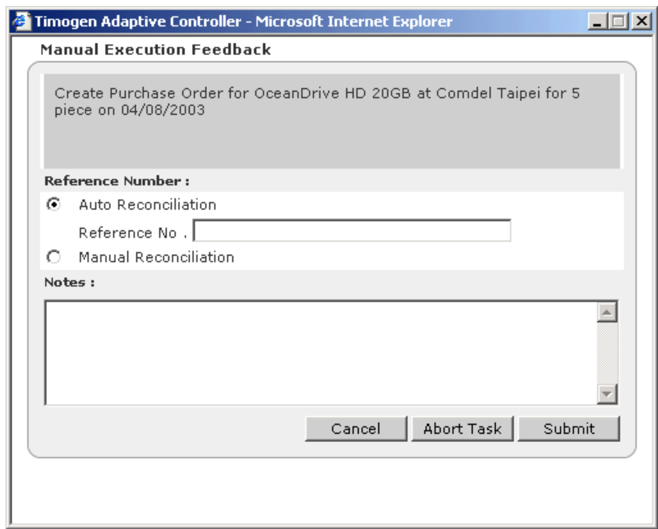
1 In the Functions drop-down list, select **Business User**.

2 Click the **Execution** tab, then click **Tasks**. The Tasks page appears.



Manual tasks that have been approved and are awaiting execution have an *Execute* link in the Actions column.

3 Click the **Execute** link for the task you have executed. The Manual Execution Feedback dialog box appears.



4 Select a Reference Number option:

Field	Description
Auto Reconciliation	Select this option if the task has a reference number and enter that reference number. Once the order is entered into the ERP system with that reference number, the order data will be automatically reconciled.
Manual Reconciliation	Select this option if you will reconcile this task yourself.

5 Optionally enter a note.

6 Click **Submit**.

7 In the confirmation dialog box, click **OK**.

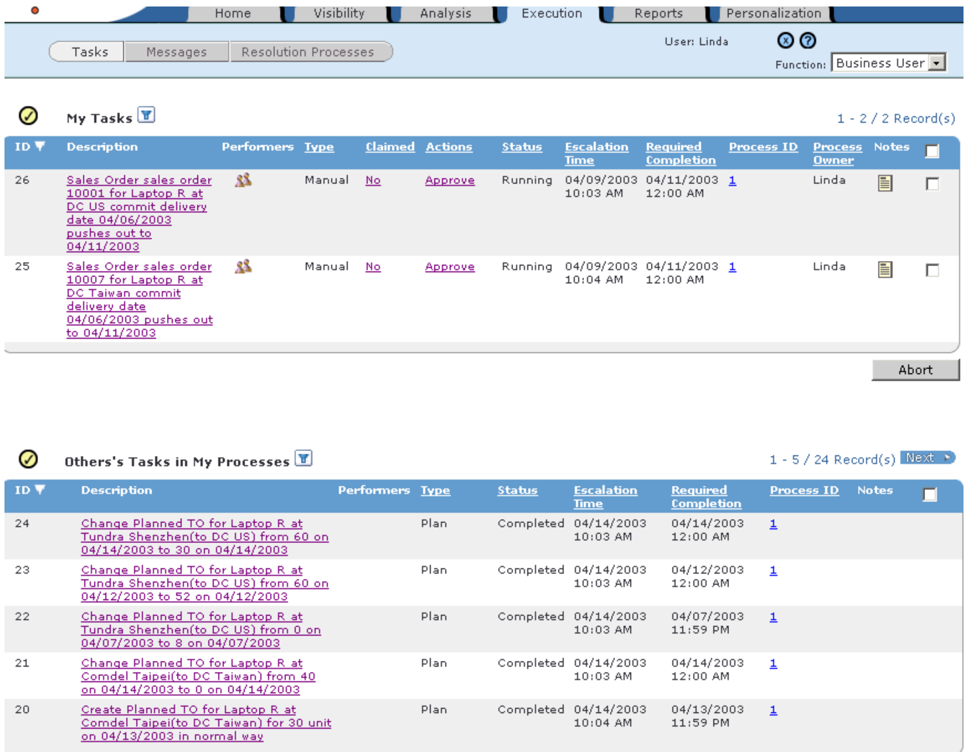
The task status will change to *Completed*.

Viewing Task Details

To view task details

1 In the Functions drop-down list, select **Business User**.

2 Click the **Execution** tab, then click **Tasks**. The Tasks page appears.



3 Click a task name.

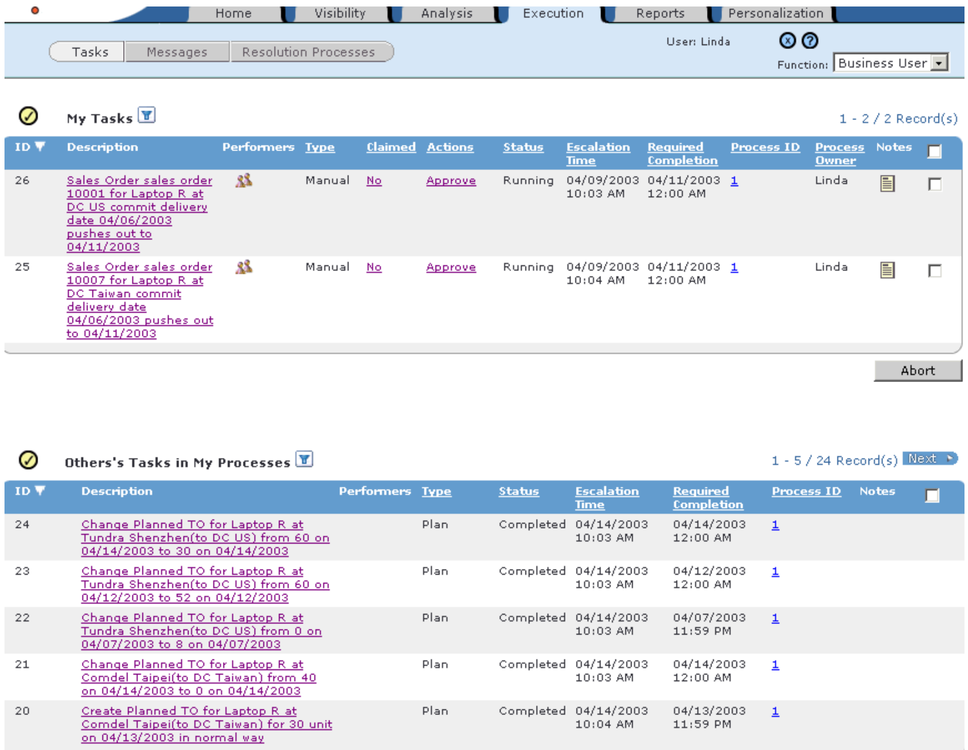
Viewing Task Processes

A task is a part of a resolution process, which contains one or more tasks. Timogen Adaptive Controller has the capability to show the full resolution process that a task is a part of.

To view the process that contains a task

1 In the Functions drop-down list, select **Business User**.

2 Click the **Execution** tab, then click **Tasks**. The Tasks page appears.



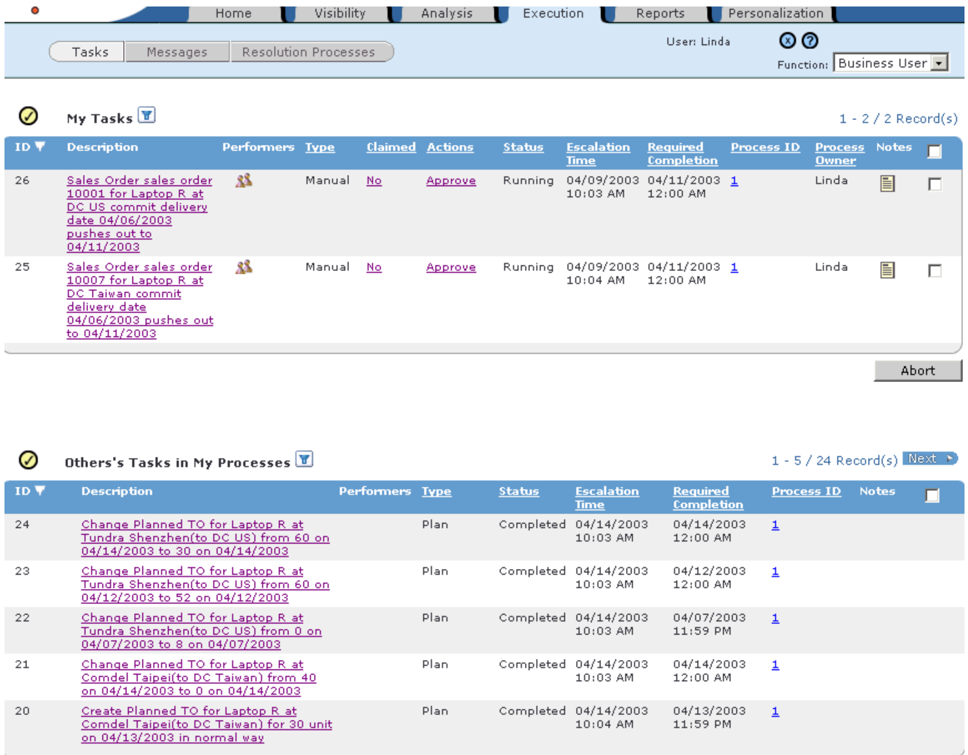
3 In the Process ID column, click the process ID number of a task. The Resolution Process page appears listing all the tasks in the process.

Viewing Task Performers

Task information includes who can approve and who can execute the task.

To view task performers

1. In the Functions drop-down list, select **Business User**.
2. Click the **Execution** tab, then click **Tasks**. The Tasks page appears.



3. In the Performers column, click the performers icon for the task where you want to view the performers.

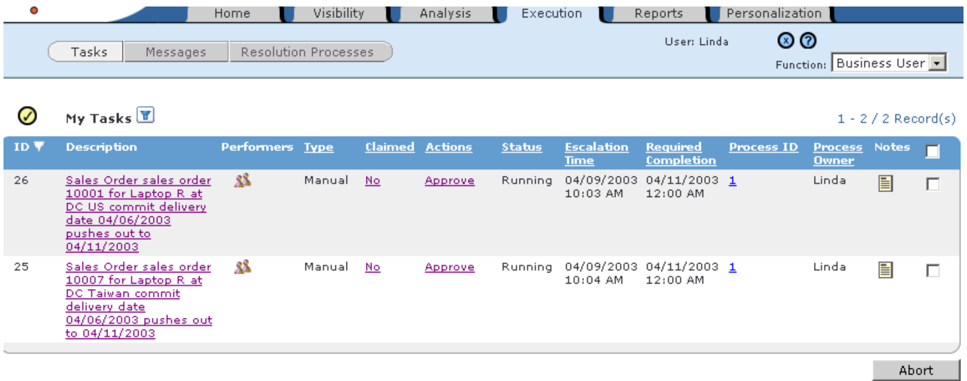
   The Performer List dialog box shows the roles that can claim and execute the task and also shows the user (if any) who has done so.

Viewing Task Notes

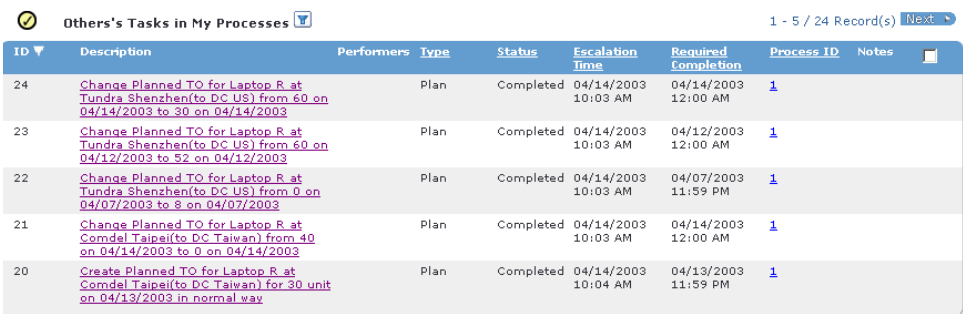
Any time a step in the process of completing a task is accomplished, a note can be added by the user responsible. You can view all those notes related to a task.

To view task notes

1. In the Functions drop-down list, select **Business User**.
2. Click the **Execution** tab, then click **Tasks**. The Tasks page appears.



ID	Description	Performers	Type	Claimed	Actions	Status	Escalation Time	Required Completion	Process ID	Process Owner	Notes
26	Sales Order sales order 10001 for Laptop R at DC US commit delivery date 04/06/2003 pushes out to 04/11/2003		Manual	No	Approve	Running	04/09/2003 10:03 AM	04/11/2003 12:00 AM	1	Linda	
25	Sales Order sales order 10007 for Laptop R at DC Taiwan commit delivery date 04/06/2003 pushes out to 04/11/2003		Manual	No	Approve	Running	04/09/2003 10:04 AM	04/11/2003 12:00 AM	1	Linda	



ID	Description	Performers	Type	Status	Escalation Time	Required Completion	Process ID	Notes
24	Change Planned TO for Laptop R at Tundra Shenzhen(to DC US) from 60 on 04/14/2003 to 30 on 04/14/2003		Plan	Completed	04/14/2003 10:03 AM	04/14/2003 12:00 AM	1	
23	Change Planned TO for Laptop R at Tundra Shenzhen(to DC US) from 60 on 04/12/2003 to 52 on 04/12/2003		Plan	Completed	04/14/2003 10:03 AM	04/12/2003 12:00 AM	1	
22	Change Planned TO for Laptop R at Tundra Shenzhen(to DC US) from 0 on 04/07/2003 to 8 on 04/07/2003		Plan	Completed	04/14/2003 10:03 AM	04/07/2003 11:59 PM	1	
21	Change Planned TO for Laptop R at Comdel Taipei(to DC Taiwan) from 40 on 04/14/2003 to 0 on 04/14/2003		Plan	Completed	04/14/2003 10:03 AM	04/14/2003 12:00 AM	1	
20	Create Planned TO for Laptop R at Comdel Taipei(to DC Taiwan) for 30 unit on 04/13/2003 in normal way		Plan	Completed	04/14/2003 10:04 AM	04/13/2003 11:59 PM	1	

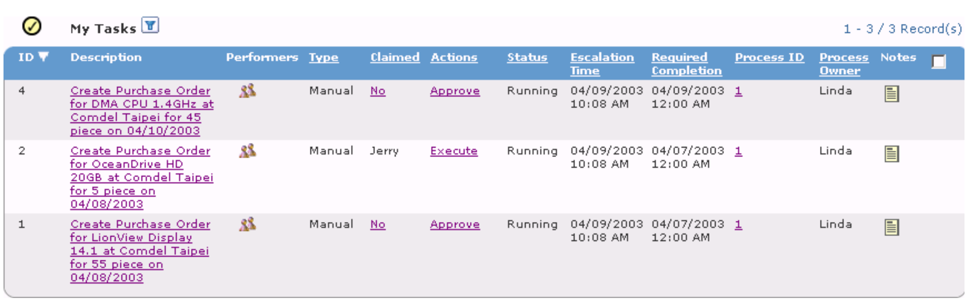
3. In the Notes column, click the notes icon for the task where you want to view the notes.

Reconciling Tasks

Manual tasks, tasks that are performed outside the Timogen Adaptive Controller system, must be reconciled once they are completed.

To reconcile a task

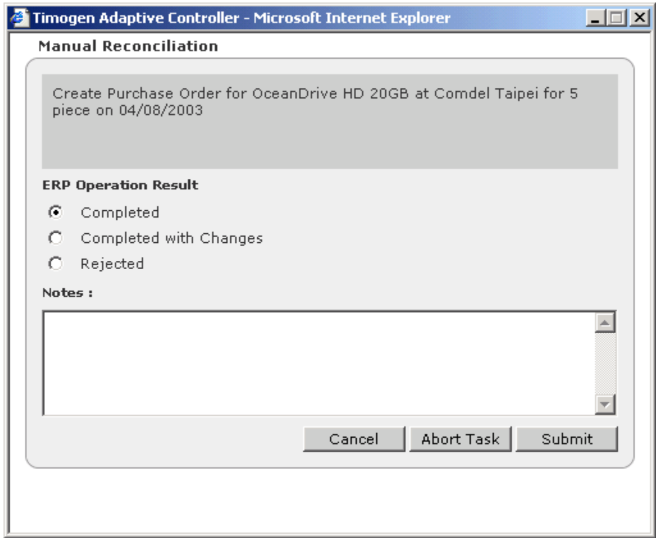
1. In the Functions drop-down list, select **Business User**.
2. Click the **Execution** tab, then click **Tasks**. The Tasks page appears.



ID	Description	Performers	Type	Claimed	Actions	Status	Escalation Time	Required Completion	Process ID	Process Owner	Notes
4	Create Purchase Order for DMA CPU 1.4GHz at Comdel Taipei for 45 piece on 04/10/2003		Manual	No	Approve	Running	04/09/2003 10:08 AM	04/09/2003 12:00 AM	1	Linda	
2	Create Purchase Order for OceanDrive HD 20GB at Comdel Taipei for 5 piece on 04/08/2003		Manual	Jerry	Execute	Running	04/09/2003 10:08 AM	04/07/2003 12:00 AM	1	Linda	
1	Create Purchase Order for LionView Display 14.1 at Comdel Taipei for 55 piece on 04/08/2003		Manual	No	Approve	Running	04/09/2003 10:08 AM	04/07/2003 12:00 AM	1	Linda	

Manual tasks that have been executed and are awaiting reconciliation have a *Reconcile* link in the Actions column.

3 Click the **Reconcile** link for the task you have executed. The Manual Reconciliation dialog box appears.



4 Select an ERP Operation Result and optionally enter a note.

Field	Description
Completed	Select if the task was completed as described.
Completed with Changes	Select if the task was completed, but differently then the task description. For example, a changed order amount.
Rejected	Select if the task was not completed.

5 Click **Submit**.

6 In the confirmation dialog box, click **OK**.

Stopping Tasks

Task owners can stop incomplete tasks from being completed. When a task is stopped, all task performers receive a notification email.

To stop a task

1 In the Functions drop-down list, select **Business User**.

2 Click the **Execution** tab, then click **Tasks**. The Tasks page appears.

3 Select the check box at the right end of the line of the task you want to stop.

4 Click **Abort**.

5 In the confirmation dialog box, click **OK**.

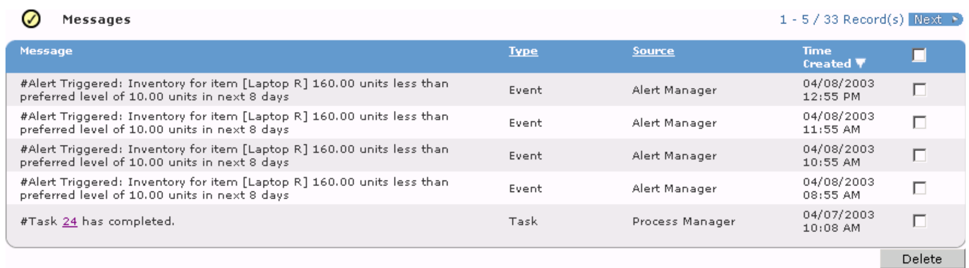
Messages

As Timogen Adaptive Controller operates, messages are creates. These messages can be about alerts being triggered, tasks being completed, and more. The messages page lists such messages for areas where you're responsible.

Viewing Messages

To view messages

1. In the Functions drop-down list, select **Business User**.
2. Click the **Execution** tab, then click **Messages**. The Messages page appears.

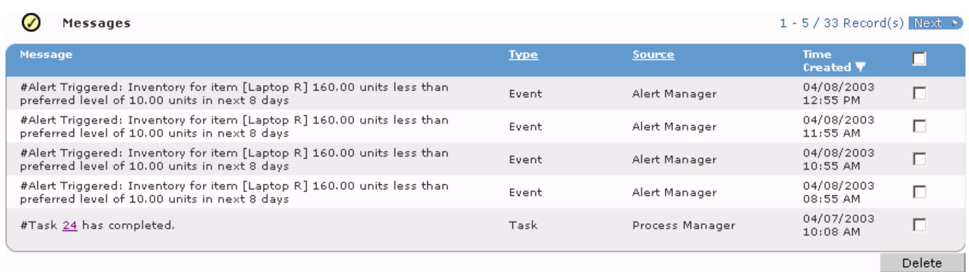


The Messages page shows complete information about each message, including its content, its type, its source, that the time it was generated.

Deleting Messages

To delete a message

1. In the Functions drop-down list, select **Business User**.
2. Click the **Execution** tab, then click **Messages**. The Messages page appears.



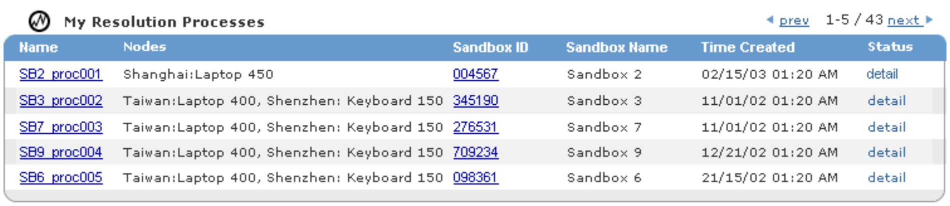
3. Select the check box at the right end of the line of the message you want to delete.
4. Click **Delete**.
5. In the confirmation dialog box, click **OK**.

Resolution Process

When the resolution process definition (resolution plan) is executed, it becomes a Resolution Process. The Resolution Process page shows:

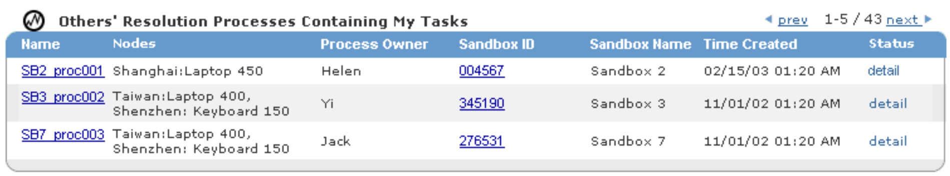
- All your resolution processes and their current status
- Others' resolution processes containing tasks assigned to you

The Resolution Process page shows:


My Resolution Processes

prev 1-5 / 43 next

Name	Nodes	Sandbox ID	Sandbox Name	Time Created	Status
SB2_proc001	Shanghai:Laptop 450	004567	Sandbox 2	02/15/03 01:20 AM	detail
SB3_proc002	Taiwan:Laptop 400, Shenzhen: Keyboard 150	345190	Sandbox 3	11/01/02 01:20 AM	detail
SB7_proc003	Taiwan:Laptop 400, Shenzhen: Keyboard 150	276531	Sandbox 7	11/01/02 01:20 AM	detail
SB9_proc004	Taiwan:Laptop 400, Shenzhen: Keyboard 150	709234	Sandbox 9	12/21/02 01:20 AM	detail
SB6_proc005	Taiwan:Laptop 400, Shenzhen: Keyboard 150	098361	Sandbox 6	21/15/02 01:20 AM	detail


Others' Resolution Processes Containing My Tasks

prev 1-5 / 43 next

Name	Nodes	Process Owner	Sandbox ID	Sandbox Name	Time Created	Status
SB2_proc001	Shanghai:Laptop 450	Helen	004567	Sandbox 2	02/15/03 01:20 AM	detail
SB3_proc002	Taiwan:Laptop 400, Shenzhen: Keyboard 150	Yi	345190	Sandbox 3	11/01/02 01:20 AM	detail
SB7_proc003	Taiwan:Laptop 400, Shenzhen: Keyboard 150	Jack	276531	Sandbox 7	11/01/02 01:20 AM	detail

Field Name	Description
Name	The internal ID of the Resolution Process. Click on the link to see the list of tasks in this Resolution Process.
Nodes	The Impact Nodes that have been included in the scope of the Resolution Process.
Sandbox ID	The internal Sandbox ID in which this Resolution Process has been defined. Click on the link to see the Sandbox in more detail. A View Only mode of the Sandbox is displayed.
Sandbox Name	The name of the sandbox.
Time Created	The date and the time on which this Resolution Process was created.
Status	Hover your mouse over Detail to see the status of the tasks in the process. The pop-up shows the number of tasks that are not started, aborted, running, and completed.

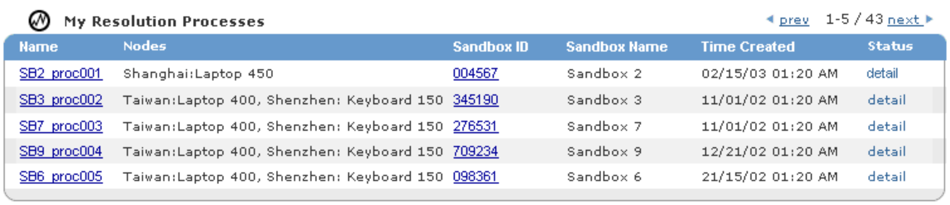
In the Others' Resolution Pane, the name of the Process Owner (Sandbox Owner) is also shown.

Viewing Resolution Process Tasks

You can view the list of tasks of any of your resolution processes.

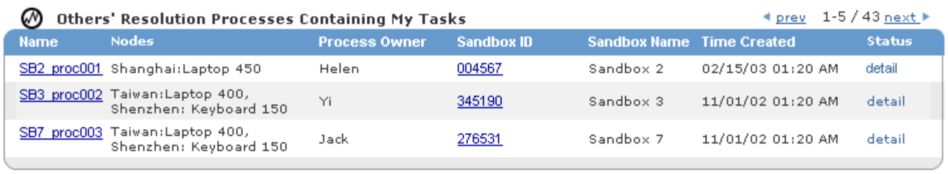
To view resolution process tasks

1. In the Functions drop-down list, select **Business User**.
2. Click the **Execution** tab, then click **Resolution Process**. The Resolution Process page appears.


My Resolution Processes

prev 1-5 / 43 next

Name	Nodes	Sandbox ID	Sandbox Name	Time Created	Status
SB2_proc001	Shanghai:Laptop 450	004567	Sandbox 2	02/15/03 01:20 AM	detail
SB3_proc002	Taiwan:Laptop 400, Shenzhen: Keyboard 150	345190	Sandbox 3	11/01/02 01:20 AM	detail
SB7_proc003	Taiwan:Laptop 400, Shenzhen: Keyboard 150	276531	Sandbox 7	11/01/02 01:20 AM	detail
SB9_proc004	Taiwan:Laptop 400, Shenzhen: Keyboard 150	709234	Sandbox 9	12/21/02 01:20 AM	detail
SB6_proc005	Taiwan:Laptop 400, Shenzhen: Keyboard 150	098361	Sandbox 6	21/15/02 01:20 AM	detail


Others' Resolution Processes Containing My Tasks

prev 1-5 / 43 next

Name	Nodes	Process Owner	Sandbox ID	Sandbox Name	Time Created	Status
SB2_proc001	Shanghai:Laptop 450	Helen	004567	Sandbox 2	02/15/03 01:20 AM	detail
SB3_proc002	Taiwan:Laptop 400, Shenzhen: Keyboard 150	Yi	345190	Sandbox 3	11/01/02 01:20 AM	detail
SB7_proc003	Taiwan:Laptop 400, Shenzhen: Keyboard 150	Jack	276531	Sandbox 7	11/01/02 01:20 AM	detail

3. In the ID column, click the ID number of a resolution process. The Resolution Process page appears listing all the tasks in the process. That task list shows the following information:

Field Name	Description
Task ID	Internal ID of the task.
Description	A description of the task is displayed here. Click on the Description to view the details.
Performers	The performers associated with this task. Click on the link to see the list of Approvers and Executors for this task. The Performers for a task are set by the Business Admin user. For more details, refer to Section 2.
My Task	Indicates if this task has been assigned to you.
Type	Indicates whether the task type is manual or automatic.
Claimed	Indicates if this task has been claimed. This prevents duplicate users from simultaneously operating on the same task. If a task has been claimed, the name of the user who has claimed it is displayed here. If a task has not been claimed, the status of the field is 'No' and the user can click on the link and claim the task.

Claimed	Indicates if this task has been claimed. This prevents duplicate users from simultaneously operating on the same task. If a task has been claimed, the name of the user who has claimed it is displayed here. If a task has not been claimed, the status of the field is 'No' and the user can click on the link and claim the task.

6

Reports

Timogen Adaptive Controller can generate a number of reports that provide a variety of useful information. You can view the latest of any subscribed scheduled reports or you can generate your own on-demand report configured to use the data you choose. You can also export a report to a comma-separated value (.CSV) text file.

Scheduled Reports

Scheduled Reports are configured by the Business Admin user and scheduled to run at set times and dates. For more details on scheduling reports, see "Defining Scheduled Reports" on page 137.

Viewing Scheduled Reports

Reports can be scheduled to run on a regular schedule defined by a Business Admin user. You can view the latest scheduled report that you are subscribed to. (See "Scheduled Report Subscriptions" on page 93.)

To view a scheduled report

1. In the Function drop-down list, select Business User.
2. Click the **Reports** tab.
3. Click **Scheduled Reports**. The Scheduled Reports list page appears.
4. Click a **Report ID** link.

Note: You can export the report to a comma-separated value (.CSV) text file. See "Exporting Reports" on page 80.

On-Demand Reports

You can generate any of the available reports on demand.

Creating Alert Summary Reports

Alert Summary reports can contain any type of alert for any valid item/location combination (defined Impact Node).

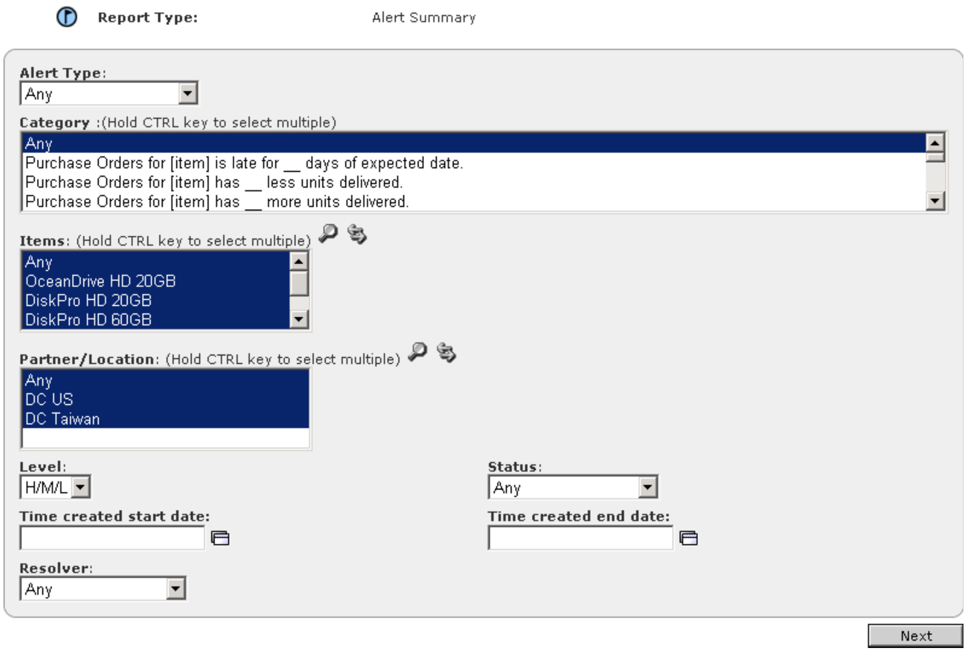
To create an Alert Summary report

1 In the **Function** drop-down list, select Business User.

2 Click the **Reports** tab.

3 Click **On-Demand Reports**.

4 In the **Report Type** drop-down list box, select Alert Summary, then click **Go**. The Alert Summary report definition page appears.



5 Enter or select the data for the report:

Field Name	Description
Alert Type	Select Any (for all alert types), Impact, or Event.
Category.	Select one or more alert categories.
Items	Select one or more Items to include in the report. If an Item you want included is not in the Items list: **1** Click **2** In the Item Selector dialog box, optionally enter Search Criteria, then click **Search**. **3** Select one or more Items in the Search Results field, then click **Select**.
Partner/ Location	Select one or more Partners/Locations to include in the report. If a Partner/Location is not in the Partner/Location list: **1** Click **2** In the Location Selector dialog box, optionally a Keyword, then click **Search**. **3** Select one or more Items in the Search Results field, then click **Select**.

Field Name	Description
Level	Select a level of alerts to be included in the report: H/M/L - All alert levels H/M - Only alerts at High or Medium level. H - Only alerts at High level.
Status	Optionally select an alert Status from Any, Active, In Progress, Closed, or Escalated. (Select Any to include all alerts.)
Time created start date	Optionally enter a date (in MM/DD/YYYY format) or click to select a beginning date limit for alerts in the report.
Time created end date	Optionally enter a date (in MM/DD/YYYY format) or click to select a end date limit for alerts in the report.
Resolver	Optionally select a resolver.

4 Click **Next**.

The report appears on a page with 3 sections. The top section summarizes the report options. The middle section lists details of all the alerts that fit within the selected options. The bottom section shows the total number of alerts in the report and how many for each level and status.

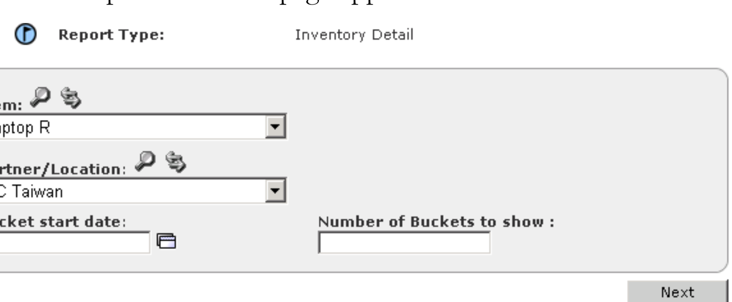
Note: You can export the report to a comma-separated value (.CSV) text file. See "Exporting Reports" on page 80.

Creating Inventory Detail Reports

Inventory Detail reports shows inventory information about one inventory Item at one Location over a defined set of time buckets.

To create an Inventory Detail report

1. In the **Function** drop-down list, select Business User.
2. Click the **Reports** tab.
3. Click **On-Demand Reports**.
4. In the **Report Type** drop-down list box, select Inventory Detail, then click **Go**. The Inventory Detail report definition page appears.



5 Enter or select the data for the report:

Field Name	Description
Item	Select an Item to include in the report. If the Item you want included is not in the Items list: **1** Click **2** In the Item Selector dialog box, optionally enter Search Criteria, then click **Search**. **3** Select one or more Items in the Search Results field, then click **Select**.
Partner/ Location	Select a Partner/Location to include in the report. If a Partner/ Location is not in the Partner/Location list: **1** Click **2** In the Location Selector dialog box, optionally a Keyword, then click **Search**. **3** Select one or more Items in the Search Results field, then click **Select**.
Bucket start date	Enter a date (in MM/DD/YYYY format) or click to select a beginning date for the report. The date must be later than the current date.
Number of buckets to show	Enter a number greater than 0.

4 Click **Next**.

The report appears on a page with 2 sections. The top section summarizes the report options. The bottom section shows beginning and ending inventory, scheduled and planned inflows and planned outflows, and safety stock for all time buckets for that inventory item at that location.

Note: You can export the report to a comma-separated value (.CSV) text file. See "Exporting Reports" on page 80.

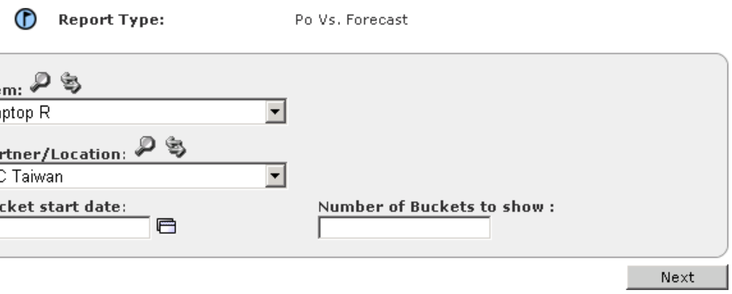
Creating PO vs. Forecast Reports

PO vs. Forecast reports shows purchase order vs. inventory information about one inventory Item at one Location over a defined set of time buckets.

To create a PO vs. Forecast report

1 In the **Function** drop-down list, select Business User.
2 Click the **Reports** tab.
3 Click **On-Demand Reports**.

4 In the **Report Type** drop-down list box, select PO vs. Forecast, then click **Go**. The PO vs. Forecast report definition page appears.



5 Enter or select the data for the report:

Field Name	Description
Item	Select an Item to include in the report. If the Item you want included is not in the Items list: **1** Click **2** In the Item Selector dialog box, optionally enter Search Criteria, then click **Search**. **3** Select one or more Items in the Search Results field, then click **Select**.
Partner/ Location	Select a Partner/Location to include in the report. If a Partner/ Location is not in the Partner/Location list: **1** Click **2** In the Location Selector dialog box, optionally a Keyword, then click **Search**. **3** Select one or more Items in the Search Results field, then click **Select**.
Bucket start date	Enter a date (in MM/DD/YYYY format) or click to select a beginning date for the report. The date must be later than the current date.
Number of buckets to show	Enter a number greater than 0.

4 Click **Next**.

The report appears on a page with 3 sections. The top section summarizes the report options. The middle section lists details of all the alerts that fit within the selected options. The bottom section shows the total number of alerts in the report and how many for each level and status.

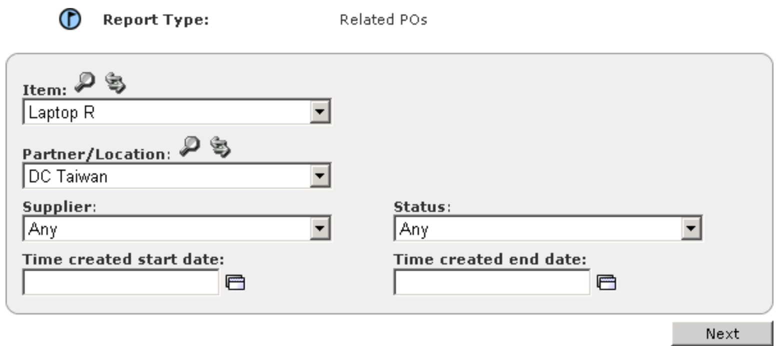
Note: You can export the report to a comma-separated value (.CSV) text file. See "Exporting Reports" on page 80.

Creating Related POs Reports

Related POs reports shows supplier and status purchase order information for one inventory Item at one Location between two defined dates.

To create a Related POs report

1. In the **Function** drop-down list, select Business User.
2. Click the **Reports** tab.
3. Click **On-Demand Reports**.
4. In the **Report Type** drop-down list box, select Related POs, then click **Go**. The Related POs report definition page appears.



5. Enter or select the data for the report:

Field Name	Description
Item	Select one or more Items to include in the report. If an Item you want included is not in the Items list: 1 Click 2 In the Item Selector dialog box, optionally enter Search Criteria, then click **Search**. 3 Select one or more Items in the Search Results field, then click **Select**.
Partner/ Location	Select one or more Partners/Locations to include in the report. If a Partner/Location is not in the Partner/Location list: 1 Click 2 In the Location Selector dialog box, optionally a Keyword, then click **Search**. 3 Select one or more Items in the Search Results field, then click **Select**.
Supplier	Select a supplier
Status	Select a purchase order Status from Any (to include all), Created, Accepted, Shipped, Changed, Partial, Completed, or Cancelled.
Time created start date	Optionally enter a date (in MM/DD/YYYY format) or click to select a beginning date limit for alerts in the report.
Time created end date	Optionally enter a date (in MM/DD/YYYY format) or click to select a end date limit for alerts in the report.

4 Click **Next**.

The report appears on a page with 2 sections. The top section summarizes the report options. The bottom section shows purchase order ID, supplier, status, expected and delivered quantity, and reschedule, delivered, and received ASN dates for all purchase orders that fit the report criteria.

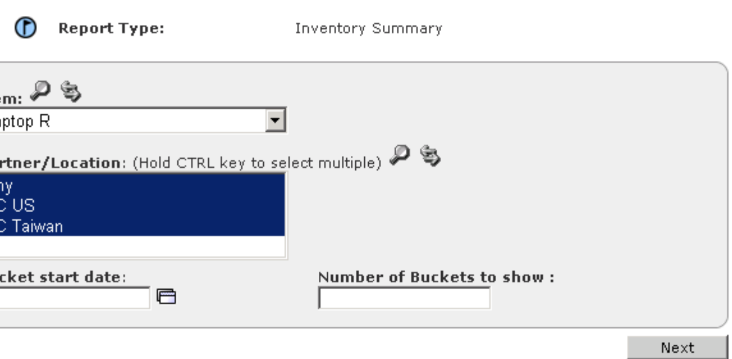
Note: You can export the report to a comma-separated value (.CSV) text file. See "Exporting Reports" on page 80.

Creating Inventory Summary Reports

Inventory Summary reports shows inventory information about one inventory Item at one or more Locations over a defined set of time buckets.

To create an Inventory Summary report

1. In the **Function** drop-down list, select Business User.
2. Click the **Reports** tab.
3. Click **On-Demand Reports**.
4. In the **Report Type** drop-down list box, select Inventory Summary, then click **Go**. The Inventory Summary report definition page appears.



5. Enter or select the data for the report:

Field Name	Description
Item	Select an Item to include in the report. If the Item you want included is not in the Items list: **1** Click **2** In the Item Selector dialog box, optionally enter Search Criteria, then click **Search**. **3** Select one or more Items in the Search Results field, then click **Select**.
Partner/ Location	Select one or more Partners/Locations to include in the report. If a Partner/Location is not in the Partner/Location list: **1** Click **2** In the Location Selector dialog box, optionally a Keyword, then click **Search**. **3** Select one or more Items in the Search Results field, then click **Select**.

Field Name	Description
Bucket start date	Enter a date (in MM/DD/YYYY format) or click to select a beginning date for the report. The date must be later than the current date.
Number of buckets to show	Enter a number greater than 0.

4 Click **Next**.

The report appears on a page with 2 sections. The top section summarizes the report options. The bottom section shows overall inventory information for the selected Item at all selected Locations for all defined time buckets.

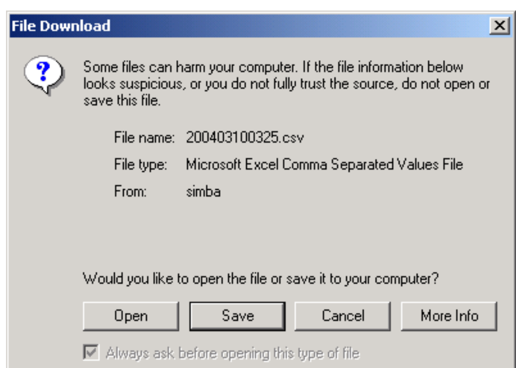
Note: You can export the report to a comma-separated value (.CSV) text file. See “Exporting Reports” on page 80.

Exporting Reports

You can export any report as a comma-separated value (.CSV) text file.

To export a report

1. View a scheduled report. (See “Viewing Scheduled Reports” on page 73.)
   -or-
   Create an on-demand report. (See “On-Demand Reports” on page 73.)
2. Click **Export**. The File Download dialog box appears.



3. Click **Save**. The Save As dialog box appears.
4. Navigate to the folder where you’d like to save the report file, then click **Save**.

7

Personalization

The Personalization tab is where you configure what information you'll see in other areas of the program.You can configure the following:

- "Configuring Home Page Sections" on page 81
- "Alert Subscriptions" on page 83
- "Impact Node Subscriptions" on page 89
- "Search and Filter List Defaults" on page 92
- "Scheduled Report Subscriptions" on page 93
- "Profile" on page 95

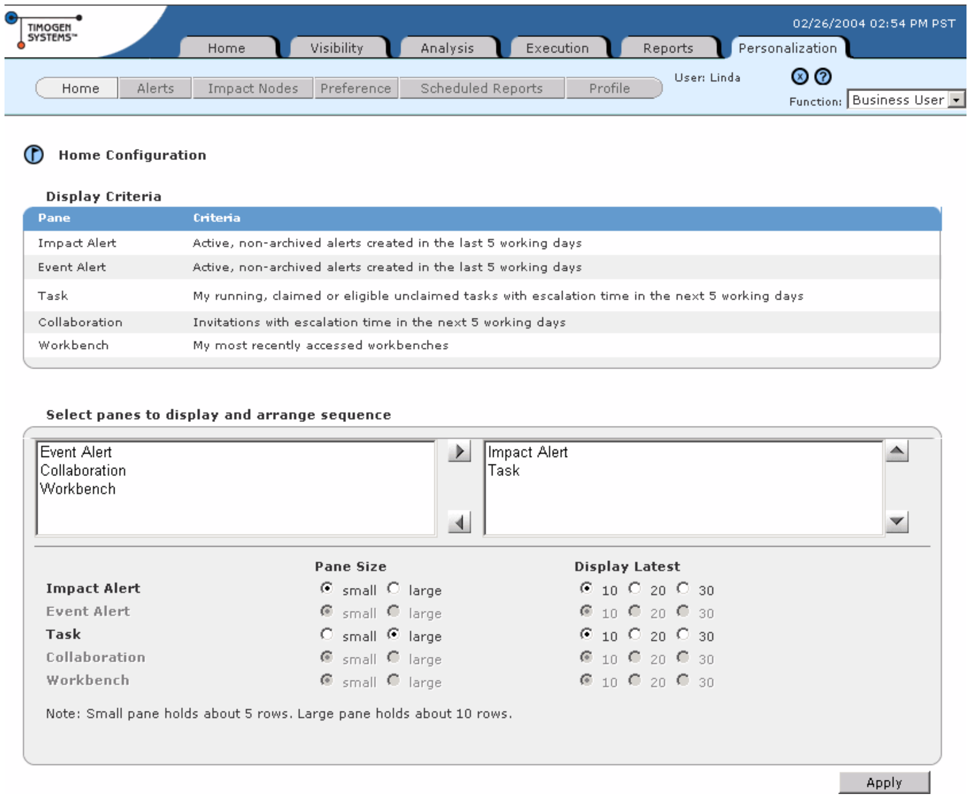
Configuring Home Page Sections

On your Business User Home page, you can configure what categories you'll see and in what order, and the maximum number of records to list in each category.

To configure your home page

1 In the **Function** drop-down list, select **Business User**.

2 Click the **Personalization** tab, then click **Home**. The Home Configuration page appears.



3 In the **Select panes to display and arrange sequence** section:

- For any pane you want to appear on your Home page, select it in the left-hand list and click . The pane moves into the right-hand list, which shows all the panes on your Home page.
- For any pane you want to remove from your Home page, select it in the right-hand list and click . The pane move into the left-hand list, which shows all the panes not shown on your Home page.
- To reorder the panes on your home page, select one in the right-hand list and click to move it up or to move it down.
- To set the pane size for each pane on your Home page (shown in bold), select an option in the Pane Size list. Small is up to 5 items. Large is up to 10 items. If you have more items in the pane than you select here, you will have to scroll through the pane to see them all.
- To set the maximum number of recent items for each pane on your Home page (shown in bold), select an option in the Display Latest list. You can choose up to the latest 10, 20, or 30 for each pane.

4 Click **Apply**.

Note: The Display Criteria section explains the contents of each pane.

Alert Subscriptions

Alerts are triggered by events and are delivered to your Visibility tab when you subscribe to them. You can subscribe or unsubscribe to event and impact alerts. Because there are so many potential alerts, to subscribe or unsubscribe to them, you first find the alerts that meet specific criteria.

You subscribe and unsubscribe to Event Alerts and Impact Alerts separately.

Note: If you search for all alerts, you may get a very long list and it may be difficult to find the alerts you want to subscribe to or unsubscribe from.

Subscribing to Event Alerts

To subscribe to Event Alerts

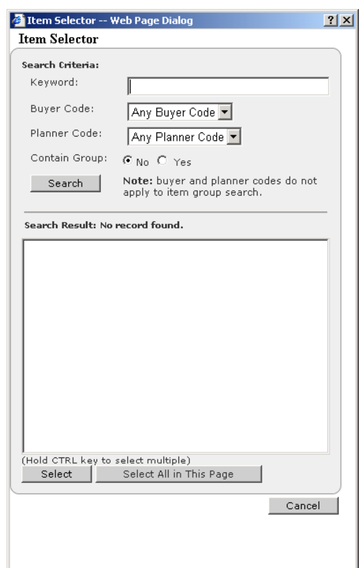
1 In the **Function** drop-down list, select **Business User**.

2 Click the **Personalization** tab, then click **Alerts**. The Alerts Subscription page appears.

3 Click the **Event Alert** tab.

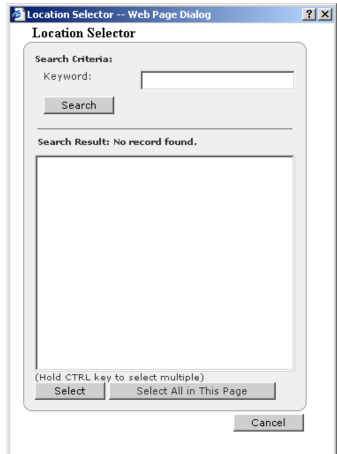
4 Search for the Event Alerts you want to subscribe to:

a Select **Any** in the Item list to search for Event Alerts for all items
-or-
To search for Event Alerts for a subset of items, click . The Item Selector dialog box appears.



- Enter any keyword(s) or select a Buyer Code or Planner Code, then click **Search**.
- In the Search Result list, select one or more items, then click **Select**. The selected items will appear in the Item list.

b Select **Any** in the Location list to search for Event Alerts for all locations
-or-
To search for Event Alerts for a subset of locations, click . The Location Selector dialog box appears.



- Enter any keyword(s), then click **Search**.
- In the Search Result list, select one or more items, then click Select. The selected items will appear in the Location list.

5. In the Alert Category List, select the check boxes for one or more alert categories. Select **All** for all alert categories.
6. Click **Search**. A list of Event Alerts that matches your search criteria and that shows the Item Name, Item ID, Location, Alert Category and Level of each alert appears at the bottom of the page.
7. For all Event Alerts you want to subscribe to, select the check box in the **Subscribe** column.
8. For each Event Alert you subscribe to, select a Level, which defines when you'll receive notification of the Event Alert. In the drop-down list in the **Level** column, select H/M/L (default), H/M, or H.

Note: When Event Alerts are defined, threshold levels can be defined to determine when the Alerts are created. This option allows you to decide at what threshold you'll be notified. For more information, see "Creating Event Alert Definitions" on page 102.

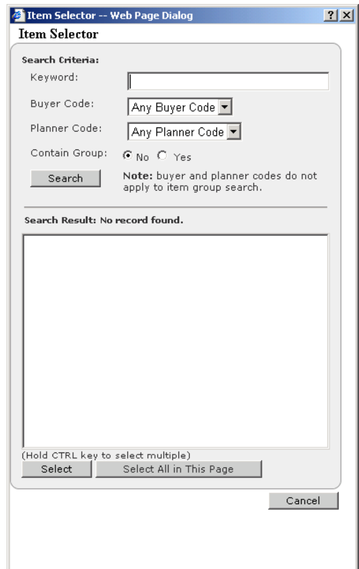
9. If you want the Event Alert sent to you in email, select the Email check box.
10. Click **Save**.

Unsubscribing from Event Alerts

To unsubscribe from Event Alerts

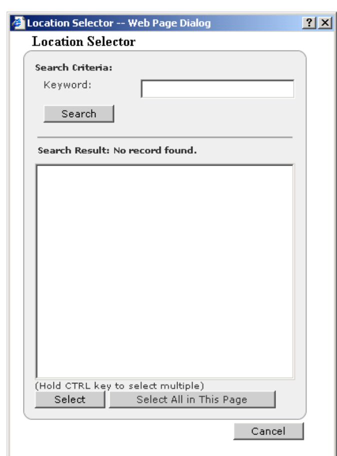
1. In the **Function** drop-down list, select **Business User**.
2. Click the **Personalization** tab, then click **Alerts**. The Alerts Subscription page appears.
3. Click the **Event Alert** tab.
4. Search for the Event Alerts you want to unsubscribe to:

a Select **Any** in the Item list to search for Event Alerts for all items
-or-
To search for Event Alerts for a subset of items, click . The Item Selector dialog box appears.



- Enter any keyword(s) or select a Buyer Code or Planner Code, then click **Search**.
- In the Search Result list, select one or more items, then click **Select**. The selected items will appear in the Item list.

b Select **Any** in the Location list to search for Event Alerts for all locations
-or-
To search for Event Alerts for a subset of locations, click . The Location Selector dialog box appears.



- Enter any keyword(s), then click **Search**.
- In the Search Result list, select one or more items, then click Select. The selected items will appear in the Location list.

5 In the Alert Category List, select the check boxes for one or more alert categories. Select **All** for all alert categories.

6 Select the **Show only alerts I am subscribed to** check box to limit the result list.

7 Click **Search**. A list of Event Alerts that matches your search criteria and that shows the Item Name, Item ID, Location, Category and Severity Level of each alert appears at the bottom of the page.

8 For all Event Alerts you want to unsubscribe to, clear the check box in the **Subscribe** column.

9 Click **Save**.

Subscribing to Impact Alerts

To subscribe to Impact Alerts

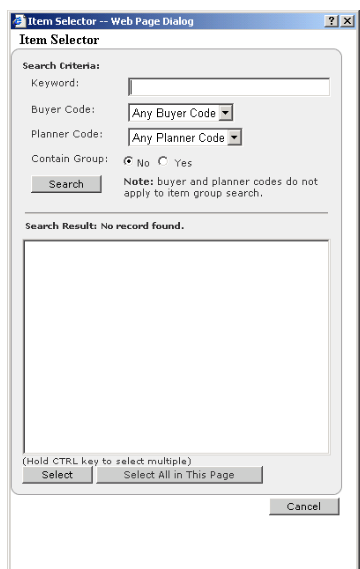
1 In the **Function** drop-down list, select **Business User**.

2 Click the **Personalization** tab, then click **Alerts**. The Alerts Subscription page appears.

3 Click the **Impact Alert** tab.

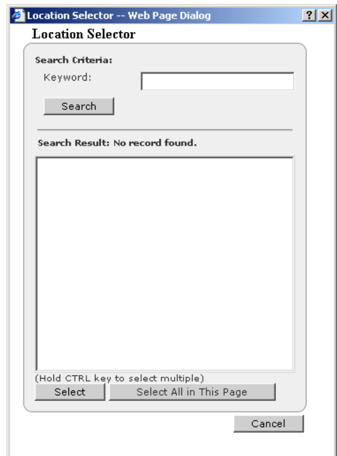
4 Search for the Impact Alerts you want to subscribe to:

  a Select **Any** in the Item list to search for Impact Alerts for all items
  -or-
  To search for Impact Alerts for a subset of items, click . The Item Selector dialog box appears.



  - Enter any keyword(s) or select a Buyer Code or Planner Code, then click **Search**.
  - In the Search Result list, select one or more items, then click **Select**. The selected items will appear in the Item list.

b Select **Any** in the Location list to search for Impact Alerts for all locations
-or-
To search for Impact Alerts for a subset of locations, click . The Location Selector dialog box appears.



- Enter any keyword(s), then click **Search**.
- In the Search Result list, select one or more items, then click Select. The selected items will appear in the Location list.

5. Click **Search**. A list of Impact Alerts that matches your search criteria and that shows the Item Name, Item ID, Location, Category and Severity Level of each alert appears at the bottom of the page.
6. For all Impact Alerts you want to subscribe to, select the check box in the **Subscribe** column.
7. For each Impact Alert you subscribe to, select a Level, which defines when you'll receive notification of the Impact Alert. In the drop-down list in the **Level** column, select H/M/L (default), H/M, or H.

Note: When Impact Alerts are defined, threshold levels can be defined to determine when the Alerts are created. This option allows you to decide at what threshold you'll be notified.

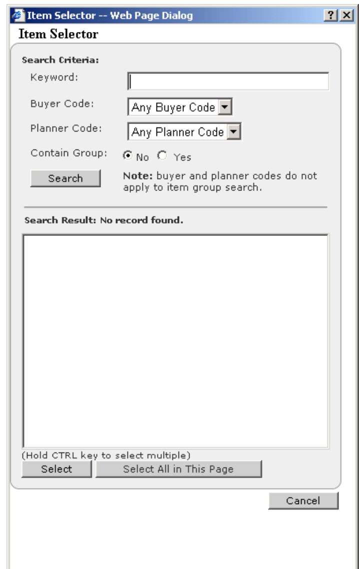
8. If you want the Impact Alert sent to you in email, select the Email check box.
9. Click **Save**.

Unsubscribing from Impact Alerts

To unsubscribe from Impact Alerts

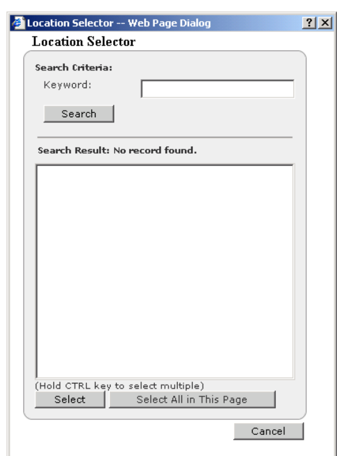
1. In the **Function** drop-down list, select **Business User**.
2. Click the **Personalization** tab, then click **Alerts**. The Alerts Subscription page appears.
3. Click the **Impact Alert** tab.
4. Search for the Impact Alerts you want to unsubscribe to:

a Select **Any** in the Item list to search for Impact Alerts for all items
-or-
To search for Impact Alerts for a subset of items, click . The Item Selector dialog box appears.



- Enter any keyword(s) or select a Buyer Code or Planner Code, then click **Search**.
- In the Search Result list, select one or more items, then click **Select**. The selected items will appear in the Item list.

b Select **Any** in the Location list to search for Impact Alerts for all locations
-or-
To search for Impact Alerts for a subset of locations, click . The Location Selector dialog box appears.



- Enter any keyword(s), then click **Search**.
- In the Search Result list, select one or more items, then click Select. The selected items will appear in the Location list.

5 Select the **Show only alerts I am subscribed to** check box to limit the result list.

6. Click **Search**. A list of Impact Alerts that matches your search criteria and that shows the Item Name, Item ID, Location, Category and Severity Level of each alert appears at the bottom of the page.
7. For all Impact Alerts you want to unsubscribe to, clear the check box in the **Subscribe** column.
8. Click **Save**.

Impact Node Subscriptions

Impact Nodes is one category of information that is on the Visibility tab. When an Impact Node is listed on the Visibility tab, you have one-click access to its status. You subscribe to Impact Nodes to have them listed on the Impact Nodes page on the Visibility tab.

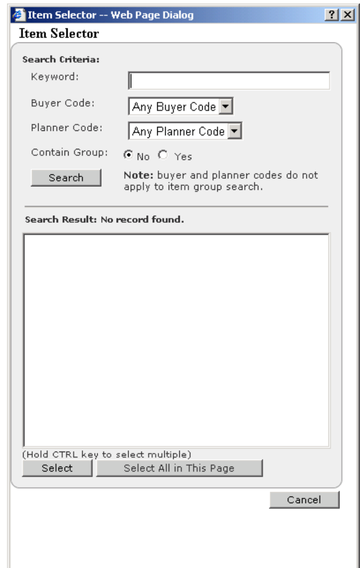
Note: Unless there is an Alert involving an Impact Node, you can view information and status about Impact Nodes only when you've subscribed to them.

Subscribing to Impact Nodes

To subscribe to Impact Nodes

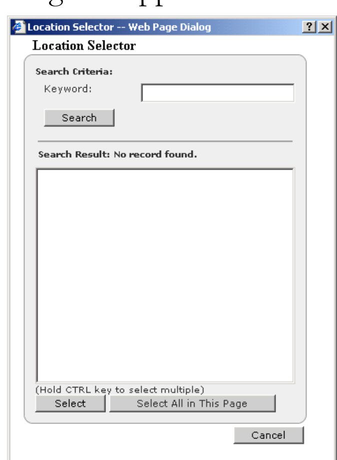
1. In the **Function** drop-down list, select **Business User**.
2. Click the **Personalization** tab, then click **Impact Nodes**. The Impact Nodes page appears.
   - If there is more than one page of Impact Nodes, click Next to see more.
   - If you want to filter the Impact Node list (making it shorter and easier to find the Impact Nodes you want to subscribe to), click . The Impact Node Filters dialog box appears.

a Select **Any** in the Item list to search for Impact Nodes for all items
-or-
To search for Impact Nodes for a subset of items, click . The Item Selector dialog box appears.



- Enter any keyword(s) or select a Buyer Code or Planner Code, then click **Search**.
- In the Search Result list, select one or more items, then click **Select**. The selected items will appear in the Item list.

b Select **Any** in the Location list to search for Impact Nodes for all locations
-or-
To search for Impact Nodes for a subset of locations, click . The Location Selector dialog box appears.



- Enter any keyword(s), then click **Search**.
- In the Search Result list, select one or more items, then click Select. The selected items will appear in the Location list.

c Click **Submit**.

3 For all Impact Nodes you want to subscribe to, select the check box in the **Subscribe** column.

4 Click **Save**.

Note: If you do not see all the Impact Nodes you expect, you may have a filter applied.

Unsubscribing from Impact Nodes

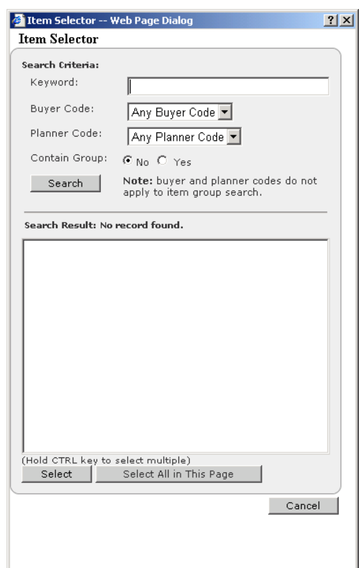
To unsubscribe from Impact Nodes

1 In the **Function** drop-down list, select **Business User**.

2 Click the **Personalization** tab, then click **Impact Nodes**. The Impact Nodes page appears.

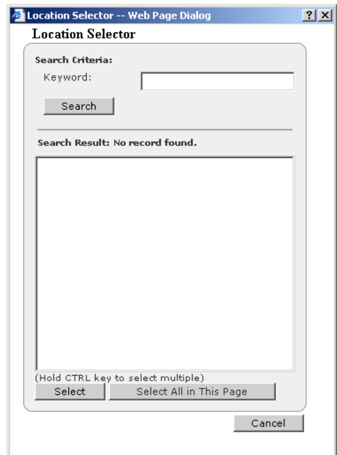
- If there is more than one page of Impact Nodes, click Next to see more.
- If you want to filter the Impact Node list (making it shorter and easier to find the Impact Nodes you want to unsubscribe from), click . The Impact Node Filters dialog box appears.

a Select **Any** in the Item list to search for Impact Nodes for all items
-or-
To search for Impact Nodes for a subset of items, click . The Item Selector dialog box appears.



- Enter any keyword(s) or select a Buyer Code or Planner Code, then click **Search**.
- In the Search Result list, select one or more items, then click **Select**. The selected items will appear in the Item list.

b Select **Any** in the Location list to search for Impact Nodes for all locations
-or-
To search for Impact Nodes for a subset of locations, click . The Location Selector dialog box appears.



- Enter any keyword(s), then click **Search**.
- In the Search Result list, select one or more items, then click Select. The selected items will appear in the Location list.

c Click **Submit**.

3 For all Impact Nodes you want to unsubscribe from, clear the check box in the **Subscribe** column.

4 Click **Save**.

Note: If you do not see all the Impact Nodes you expect, you may have a filter applied.

Search and Filter List Defaults

When you search for items, locations, or modes and when you filter to limit lists of items, locations, and nodes, you can define here what you'll see by default initially in the search dialog boxes. For example, your company may operate worldwide, but you'[re interested only in North American locations. You can designate that only North American locations will appear in the Location Search dialog boxes when they first appear (although you are also able to search in any location at any time.).

You can also set a default for the number of buckets that will appear in the Supply/Demand views.

Note: Supply/Demand views appear on 4 pages: Impact Alert Detail, Event Alert Detail, Supply Network, and Sandbox.

To set search and filter list defaults

1 In the **Function** drop-down list, select **Business User**.

2 Click the **Personalization** tab, then click **Preference**. The My Preference page appears.

3 For each of the lists of Items, Locations, and Nodes you want to appear in your search dialog boxes, click .

a In the Item Selector dialog box,

- Enter any keyword(s) or select a Buyer Code or Planner Code, then click **Search**. Do not enter anything in the Keyword field to get a list of all Items.
- In the Search Result list, select one or more items, then click **Select**. The selected items will appear in the Items list.

b In the Location Selector dialog box,

- Enter any keyword(s), then click **Search**. Do not enter anything in the Keyword field to get a list of all Locations.
- In the Search Result list, select one or more items, then click **Select**. The selected items will appear in the Locations list.

c In the Impact Node Selector dialog box,

- For Items and Locations, click . and follow the instructions in **a** and **b** to view lists of Items and Locations.
- Click **Search** to get a list of all existing Impact Nodes that are any combination of one of the Items and one of the Locations.
- In the Search Result list, select one or more items, then click **Select**. The selected items will appear in the Nodes list.

4 In each list of Items, Locations, and Nodes, select one or more, than click . The selected Items, Locations, and Nodes are moved to the My Items, My Locations, and My nodes lists, respectively.

5 Enter a number of buckets to view by default for the Supply/Demand sections.

6 Click **Save**.

Scheduled Report Subscriptions

Timogen Adaptive Controller generates many reports, and you can define which reports you will see on the Scheduled Reports page on the Reports tab.

To subscribe to scheduled reports

1 In the **Function** drop-down list, select **Business User**.

2 Click the **Personalization** tab, then click **Scheduled Reports**. The Scheduled Report Subscription page appears.

The Scheduled Report Subscription page lists all available scheduled reports. The report information includes:

Field Name	Description
Schedule ID	The unique ID of the scheduled report. Click on the ID to view details of the report criteria.
Description	The description of the scheduled report.

Field Name	Description
Type	The type of the report. This can be: • Alert Summary • Inventory Detail • PO vs. Forecast • Related POs • Inventory Summary by Location
Owner	The owner of the report.
Last Run Time	The date of the last run.

3 For all scheduled reports you want to subscribe to, select the check box in the **Subscribe** column.

4 Click **Save**.

To unsubscribe from scheduled reports

1 In the **Function** drop-down list, select **Business User**.

2 Click the **Personalization** tab, then click **Scheduled Reports**. The Scheduled Report Subscription page appears.

The Scheduled Report Subscription page lists all available scheduled reports. The report information includes:

Field Name	Description
Description	The description of the scheduled report is displayed here.
Schedule ID	The ID of the scheduled report
Type	The type of the report. This can be: • Aggregate • Detailed • Alert
Owner	The owner of the report.
Last Run Time	The time of the last report run.

3 For all scheduled reports you want to unsubscribe from, clear the check box in the **Subscribe** column.

4 Click **Save**.

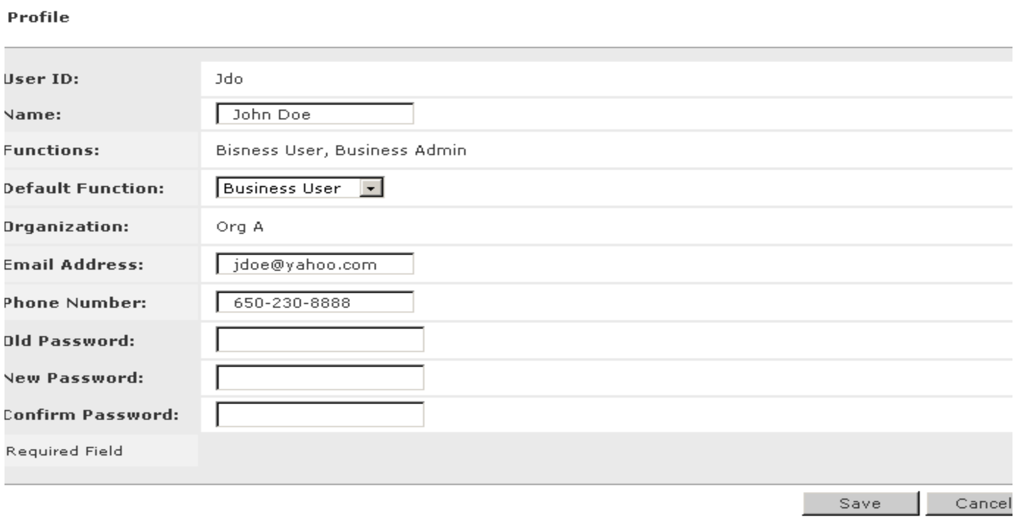
For more information on scheduled reports, see "Defining Scheduled Reports" on page 137

Profile

You can modify some information in your Timogen Adaptive Controller user profile.

To change user profile information

1. In the **Function** drop-down list, select **Business User**.
2. Click the **Personalization** tab, then click **Profile**. The Profile page appears.



3. Make any desired changes. If you want to change your password, you must enter your new password twice. Your profile information includes:

Field Name	Description
User ID	Enter your User ID here.
Name	Enter your name here.
Functions	The functions that you are allowed to perform.
Default Function	The function that will appear when you first log in.
Organization	The organization to which you belong.
Email Address	Enter your email address here.
Phone Number	Enter your phone number here.
Old Password	Enter your old password here.
New Password	Enter your new password.
Confirm Password	Reenter your new password here.

Note: You cannot change your User ID, your Functions, or your Organization. These must be changed by someone with Technical Admin function.

4. Click **Save**.

Part 2 Business Admin

The Business Admin users have planning and materials management expertise sufficient to determine the information and trigger point data that control event response. They are responsible for the following:

- Creating Node Groups
- Managing privileges
- Defining roles
- Creating problem configuration templates
- Setting up alerts
- Defining product groupings
- Scheduling inventory reports

These tasks are done easiest in the above order, as some of the later tasks are dependent on the previous ones.

Section 2 covers the following topics:

8

Alert Definition

Alerts allow users to recognize shortage or overstock conditions and get analysis of the production and financial impact of the condition. The **Business Admin** user can define when and how an alert is created and used. Parameters can be set up to determine system conditions that will trigger alerts for particular item/location (Impact Node). You can define both Event Alerts and Impact Alerts.

Event Alert Definition

Alerts that react to external events are Event Alerts. An Event Alert definition includes an alert category, the Items and Locations monitored for the alert, and the alert's attributes, which include:

- Thresholds
- Resolvers
- Escalation

Event Alert Categories

Event Alert categories include:

Supply Alert Categories

- Purchase Orders for [item] is late for ___ days of expected date
- Purchase Orders for [item] has ____ less units delivered.
- Purchase Orders for [item] has ____ more units delivered.
- CMPO for [item] is late for ____ days of expected date.
- CMPO for [item] has ____ less units delivered.
- CMPO for [item] has ___ more units delivered.
- MO for [item] is late for ____ days of expected date.
- MO for [item] has ____ less units delivered.
- MO for [item] has ____ more units delivered.
- Advanced Shipment Notice for [item] not received before ____ days of expected date.
- Planned Purchase Order quantity for [item] is less than ____ % of quantity ordered within time horizon of ____ time buckets.

- Planned Purchase Order quantity for [item] is more than ____ % of quantity ordered within time horizon of ____ time buckets.
- Planned CMPO quantity for [item] is less than _____% of quantity ordered within time horizon of ____ time buckets.
- Planned CMPO quantity for [item] is more than _____% of quantity ordered within time horizon of ____ time buckets.
- Planned MO quantity for [item] is less than _____% of quantity ordered within time horizon of ____ time buckets.
- Planned MO quantity for [item] is more than _____% of quantity ordered within time horizon of ____ time buckets.
- Planned PO quantity is more than net quantity ordered in the same time bucket (and supplier lead time is used to determine the severity level)

Demand Alert Categories

- Sales Orders for [item] exceeds SO forecast by ____ units within time horizon of ____ time buckets.
- Sales Orders for [item] exceeds SO forecast by ____ % within time horizon of ____ time buckets.
- Sales Orders for [item] less than SO forecast by ____ units within time horizon of ____ time buckets.
- Sales Orders for [item] less than SO forecast by ____ % within time horizon of ____ time buckets.

Special Alert Categories

- Manual Alert
- External Alert

Event Alert Attributes

The attributes of Event Alerts define its thresholds (when the alert is triggered), its resolvers (who is authorized to evaluate the alert and resolve its cause), and its escalation (how long an alert can exist with no action and who the alert is sent to in that case). The exception is an external alert, which just the resolvers attribute.

Event Alert Thresholds

Threshold values are argument values that match placeholders (variables) in the alert category. Most Alerts use a single variable defined in units, percentage, or time. Some Alerts use two variables, generally units or percentage filtered by their occurrence in time buckets (the second variable). When an Alert has two variables, the threshold value (units or percentage) may be set individually for High, Medium, and Low levels but the second (no of time buckets) variable must be the same for all threshold values.

For example, if the alert category is as follows:

Item has ____ quantity that is more than ___ days old.

In this example, if you choose to set the threshold values as follows:

High - 30 units Medium - 20 units Low - 10 units

Time buckets - 7

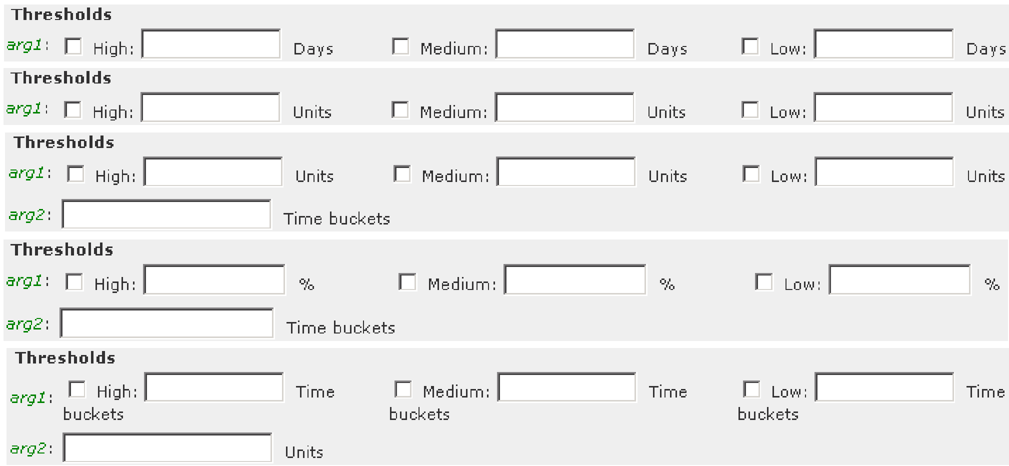
If this were the case, an Alert would be posted when:

High: 30 inventory units were more than 7 time buckets old.

Medium: 20 inventory units were more than 7 time buckets old.

Low: 10 inventory units were more than 7 time buckets old.

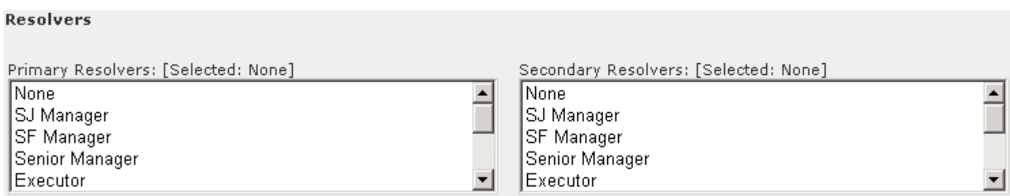
The Thresholds section for Event Alert definition can look like one of the following:



Event Alert Resolvers

In the Resolvers section, you select one or more primary and secondary resolver roles. A Resolver has the ability to change the status of an alert and initiate and control its resolution process. Any users who is a member of either role can be a resolver for this alert. At least one user must be a member of any selected role.

A Primary Resolver must be assigned before any level of alert can be enabled.



Event Alert Escalation

An alert can be escalated to an additional set of individuals if it has not been handled by a resolver within a specified period. Escalation attributes are optional for an alert definition. You can define the escalation interval, the number of hours or days after alert creation that the alert is escalated, and an escalation role. At least one user must be a member of the selected role.

An alert is escalated if:

- The Escalation Interval is provided.
- The Escalation Time has passed.
- The Alert status is not closed or pending close.
- The Alert as not been escalated previously.

Changes to an Alert Definition's Escalation Interval do not affect any existing alerts. The modified Escalation Interval is used the next time an alert is created from that Alert Definition.

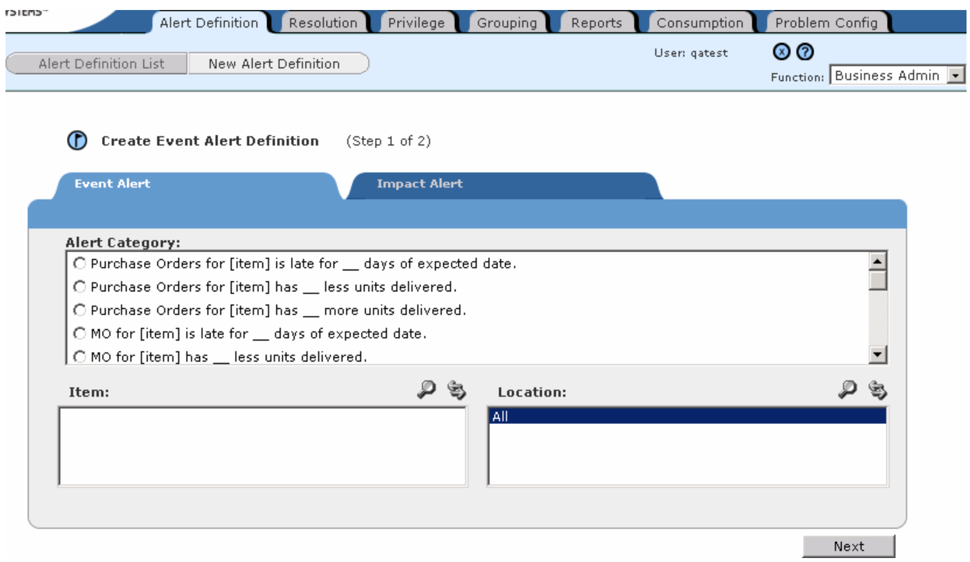
Generally, an alert can be escalated only once. But if an escalated alert is marked as Pending Close and then re-activated, the alert again becomes escalated.

Creating Event Alert Definitions

When defining an Event Alert, you first select an alert category and what Items and Locations are monitored for the alert. You then define alert attributes.

To create an Event Alert definition

1. In the **Role** drop-down list, select **Business Admin**.
2. Click the **Alert Definition** tab, then click **New Alert Definition**. The Create Event Alert Definition page appears.



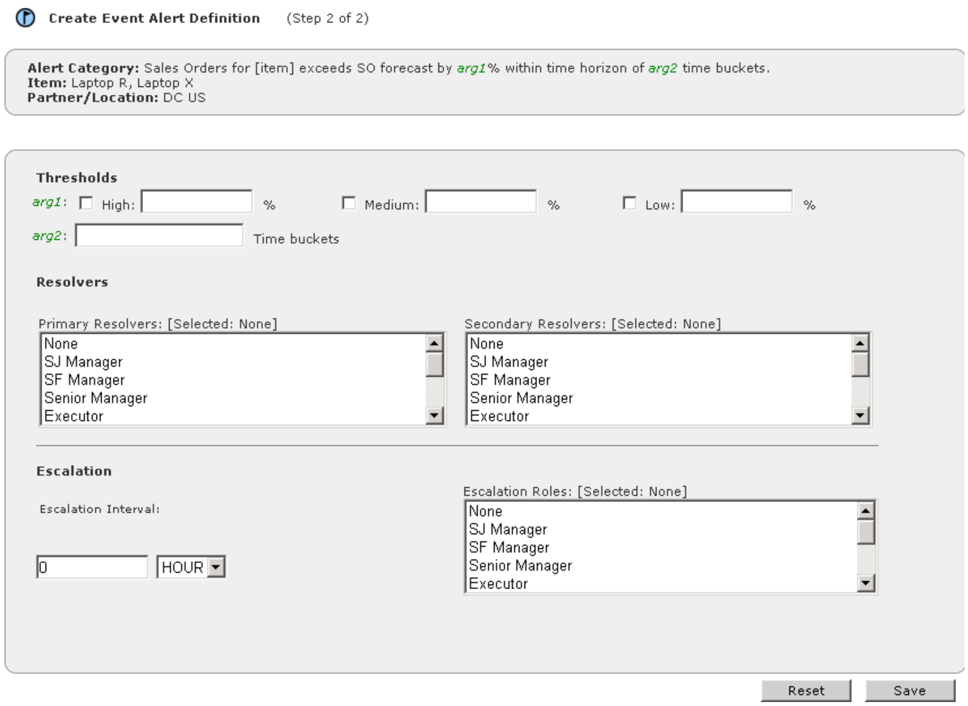
3. Select an Alert Category.

   Alert Categories define the conditions when an Alert should be posted. Alert Categories include those that respond to current conditions and those that look forward to evaluate inventory conditions and orders and compare that data to actual and projected sales orders, forewarning you of impending supply/demand problems. The complete list of alert categories is in “Event Alert Categories” on page 99.
4. Select one or more Items. (To select more than one, hold down the CRTL key while you click.)

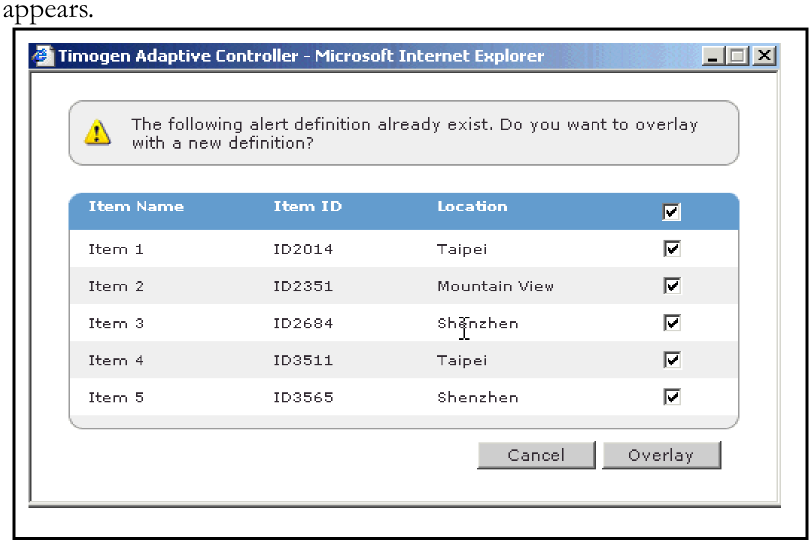
   Note: To view more records in the Items list, click , then find and select one or more Items.
5. Select a single Location (or All if you want to use all locations).

   Note: To view more records in the Locations list, click , then find and select one or more Locations.

6 Click **Next**. Page 2 of the Create Event Alert Definition appears.



Note: If one or more alert definitions already exist, the Existing Alert dialog box appears.



This dialog box contains a list of nodes that already have an alert definition. All the checkboxes are selected by default. Select any of these alert definition check boxes and click **Overlay** to define the new alert definition. (If an alert definition check box is cleared, the original definition will be retained).

7 Define the **Threshold** values for the alert. (See “Event Alert Thresholds” on page 100 for details.)

8 Select one or more **Primary** and **Secondary** Resolver roles. (To select more than one, hold down the CRTL key while you click.) (See "Event Alert Resolvers" on page 101 for details.)

9 Enter an **Escalation Interval**, select Hours or Days, and select one or more **Escalation Roles**. (To select more than one, hold down the CRTL key while you click.) (See "Event Alert Escalation" on page 101 for details.)

10 Click **Save**.

Editing Event Alert Definitions

To edit an Event Alert definition

1 In the **Role** drop-down list, select **Business Admin**.

2 Click the **Alert Definition** tab, then click **Alert Definition List**.

3 Click the **Event Alert** tab.

4 Select one or more Items and Locations and select an Alert Category (or select Any to search for alerts for any Item or in any Location or Category), then click **Search**.

A list of alerts that fit your selection appears in the Alert Category section.

5 Click for the alert you want to edit. The Edit Event Alert Definition page appears.

6 Make any desired changes to Thresholds, Resolvers, and Escalation. (See "Event Alert Thresholds" on page 100, "Event Alert Resolvers" on page 101, and "Event Alert Escalation" on page 101 for details.

You cannot change the Item, Category, or Location of an existing alert.

7 Click **Save**.

Deleting Event Alert Definitions

If you delete an Event Alert definition, and existing alerts that use that definition will still remain visible on Active or Archive lists.

To delete an Event Alert definition

1 In the **Role** drop-down list, select **Business Admin**.

2 Click the **Alert Definition** tab, then click **Alert Definition List**.

3 Click the **Event Alert** tab.

4 Select one or more Items and Locations and select an Alert Category (or select Any to search for alerts for any Item or in any Location or Category), then click **Search**.

A list of alerts that fit your selection appears in the Alert Category section.

5 Select the check box at the right end of the line for the alert you want to delete.

6 Click **Delete**.

7 In the confirmation dialog box, click **OK**.

Impact Alert Definition

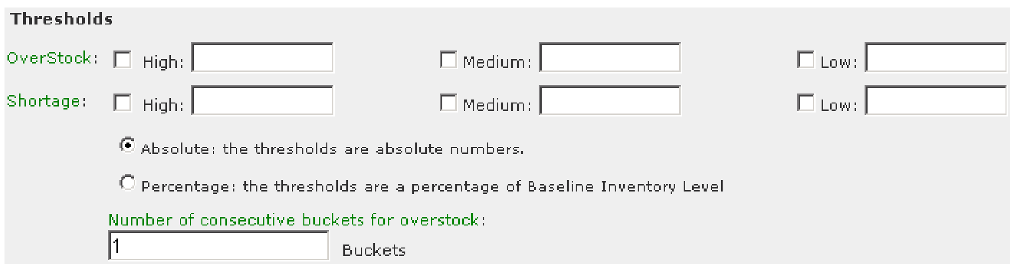
An Impact Alert indicates a shortage or overstock condition for a specific item at a specific location (an Impact Node) even as multiple events are changing in the supply chain.

Impact Alert Attributes

The attributes of Impact Alerts define its thresholds (when the alert is triggered), its resolvers (who is authorized to evaluate the alert and resolve its cause), its options, its escalation (how long an alert can exist with no action and who the alert is sent to in that case), and its template.

Impact Alert Thresholds

Impact Alert thresholds cover both overstocks and shortages and you can define High, Medium, and Low value levels for both that will trigger an alert.



You also define whether the numbers you enter are in absolute numbers (units) or a percentage and how many consecutive time buckets must occur before an overstock alert is triggered. Entering a number greater than 1 in the **Number of consecutive buckets for overstock** field will exclude transitory overstocks triggering an alert. For example, entering 2 in this field means that if Item inventory at the Location hits an overstock threshold for just one bucket, then returns below the threshold the next bucket, the defined alert will not be triggered.

The values you enter and the choices you make are used in two standard definitions:

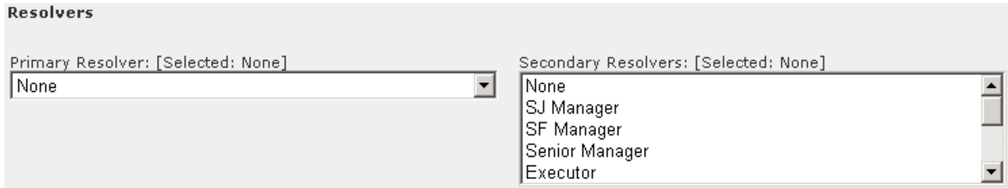
- **Overstock**: [Item] ending inventory is *High/Medium/Low* units/percent over baseline inventory level for *x* consecutive buckets.
- **Shortage**: [Item] ending inventory is *High/Medium/Low* units/percent below baseline inventory level.

Use these definitions to calculate what numbers to enter for High, Medium, and Low values (not all are required) so alerts will be triggered at the right inventory levels.

Impact Alert Resolvers

In the Resolvers section, you select one primary and one or more secondary resolver roles. A Resolver has the ability to change the status of an alert and initiate and control its resolution process. Any users who is a member of either role can be a resolver for this alert. At least one user must be a member of any selected role.

A Primary Resolver must be assigned before any level of alert can be enabled.



Impact Alert Options

You can use these options to change the default values, values that come from information imported into the Timogen Adaptive Controller system.

Horizon End Option The Plan Horizon is the number of time buckets looks out from the current time. This option allows you to alter this values for this alert:

- **Use current Plan horizon** leaves the values for this alert as imported from the ERP system.
- **Enter** is the number of time buckets forward Timogen Adaptive Controller will look to determine whether or not to activate this alert only.

Baseline Inventory Level Option The amount of safety stock is defined by the ERP system and imported into Timogen Adaptive Controller. This option allows you to define the baseline stock level for calculation of overstocks and shortages:

- **Use safety stock value** sets the baseline level used for calculation to the safety stock level.
- **Enter** is the number of the selected Items at this Location that will be used for baseline calculations for this alert.

Absolute/Temporary Overstock options When looking for overstocks, you can look at every time bucket up to the horizon end or you can look at just the end time bucket. This options determines which will be used for this alert.

- **Absolute** looks at just the last time bucket at the end of the horizon.
- **Temporary** looks at every time bucket up to the horizon end.

Absolute/Temporary Shortage option When looking for shortages, you can look at every time bucket up to the horizon end or you can look at just the end time bucket. This options determines which will be used for this alert.

- **Absolute** looks at just the last time bucket at the end of the horizon.
- **Temporary** looks at every time bucket up to the horizon end.

Impact Alert Escalation

An alert can be escalated to an additional set of individuals if it has not been handled by a resolver within a specified period. Escalation attributes are optional for an alert definition. You can define the escalation interval, the number of hours or days after alert creation that the alert is escalated, and an escalation role. At least one user must be a member of the selected role.

An alert is escalated if:

- The Escalation Interval is provided.
- The Escalation Time has passed.

- The Alert status is not closed or pending close.
- The Alert as not been escalated previously.

Changes to an Alert Definition's Escalation Interval do not affect any existing alerts. The modified Escalation Interval is used the next time an alert is created from that Alert Definition.

Generally, an alert can be escalated only once. But if an escalated alert is marked as Pending Close and then re-activated, the alert again becomes escalated.

Impact Alert Sandbox Configuration Template

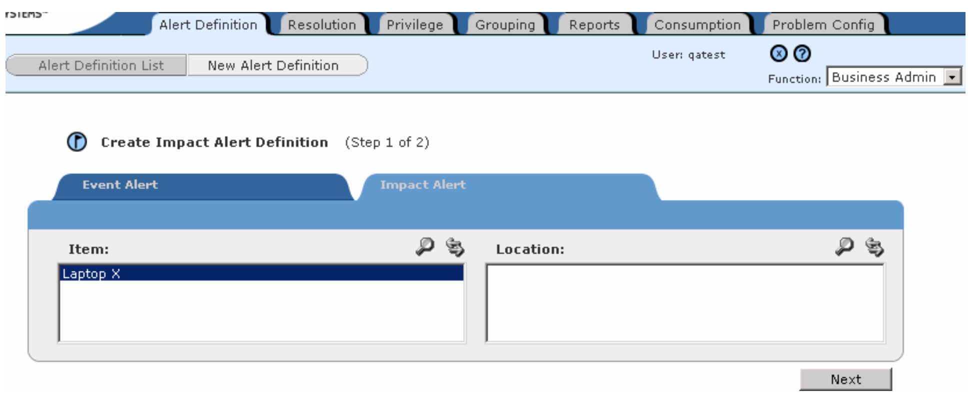
A configuration template includes inclusion strategies, business goals, and constraints and is used to drive resolution options when you Solve an Impact Alert. For more information, see “Problem Configuration Templates” on page 131.

Creating Impact Alert Definitions

When defining an Impact Alert, you first select what Items and Locations are monitored for the alert. You then define alert attributes.

To create an Impact Alert definition

1. In the **Role** drop-down list, select **Business Admin**.
2. Click the **Alert Definition** tab, click **New Alert Definition**, then click the **Impact Alert** tab. The Create Impact Alert Definition page appears.



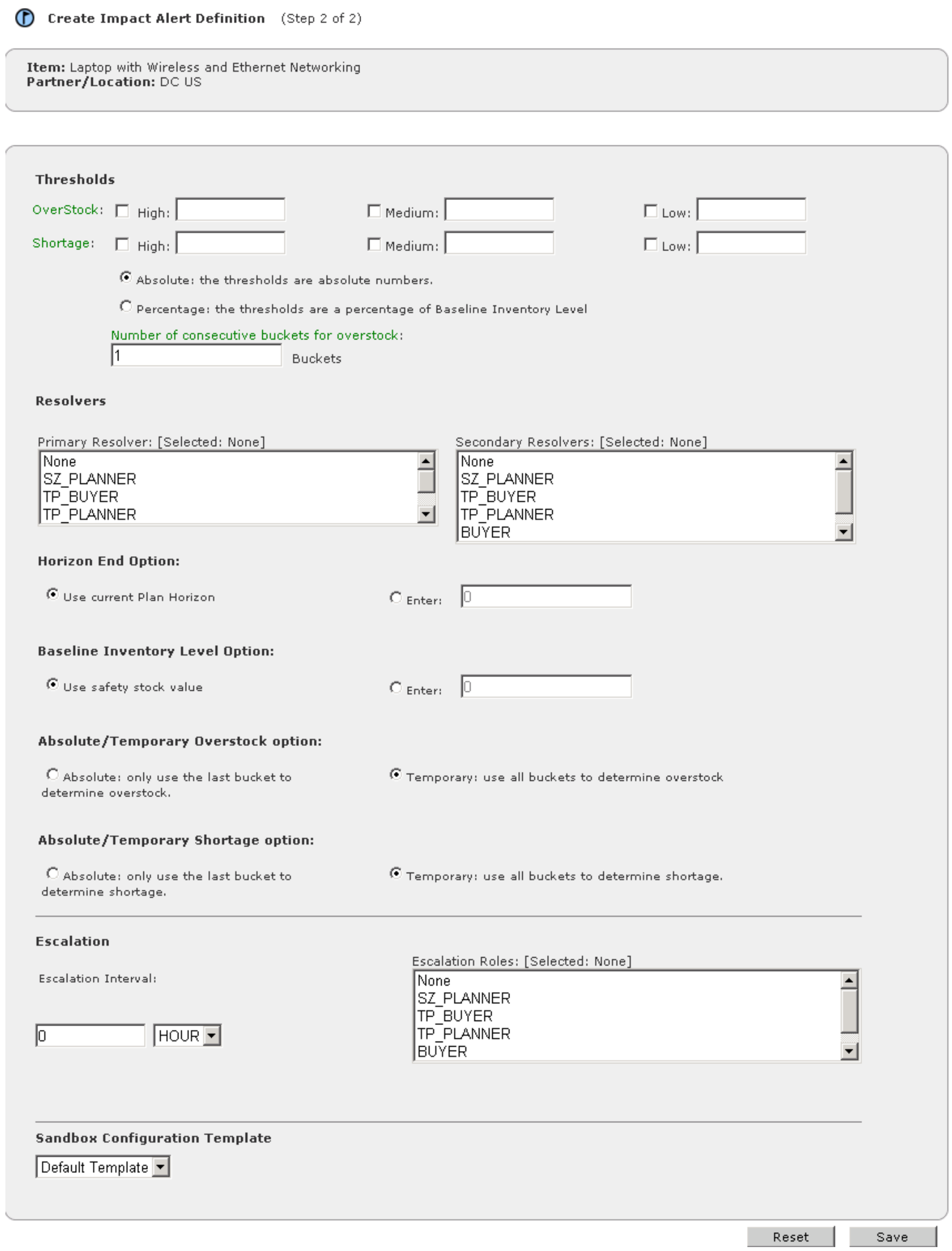
3. Select one or more Items. (To select more than one, hold down the CRTL key while you click.)

Note: To view more records in the Items list, click , then find and select one or more Items.

4. Select a single Location (or All if you want to use all locations).

Note: To view more records in the Locations list, click , then find and select one or more Locations.

5 Click **Next**. Page 2 of the Create Impact Alert Definition appears.



6 Define the **Threshold** values for the alert. (See "Impact Alert Thresholds" on page 105 for details.)

7 Select one **Primary** and one or more **Secondary** Resolver roles. (To select more than one, hold down the CRTL key while you click.) (See "Impact Alert Resolvers" on page 105 for details.)

8 Define any options for the alert. (See "Impact Alert Options" on page 106 for details.)

9 Enter an **Escalation Interval**, select Hours or Days, and select one or more **Escalation Roles**. (To select more than one, hold down the CRTL key while you click.) (See "Impact Alert Escalation" on page 106 for details.)

10 Select a **Sandbox Configuration Templat**e. (See "Impact Alert Sandbox Configuration Template" on page 107 for details.)

11 Click **Save**.

Editing Impact Alert Definitions

To edit an Impact Alert definition

1 In the **Role** drop-down list, select **Business Admin**.

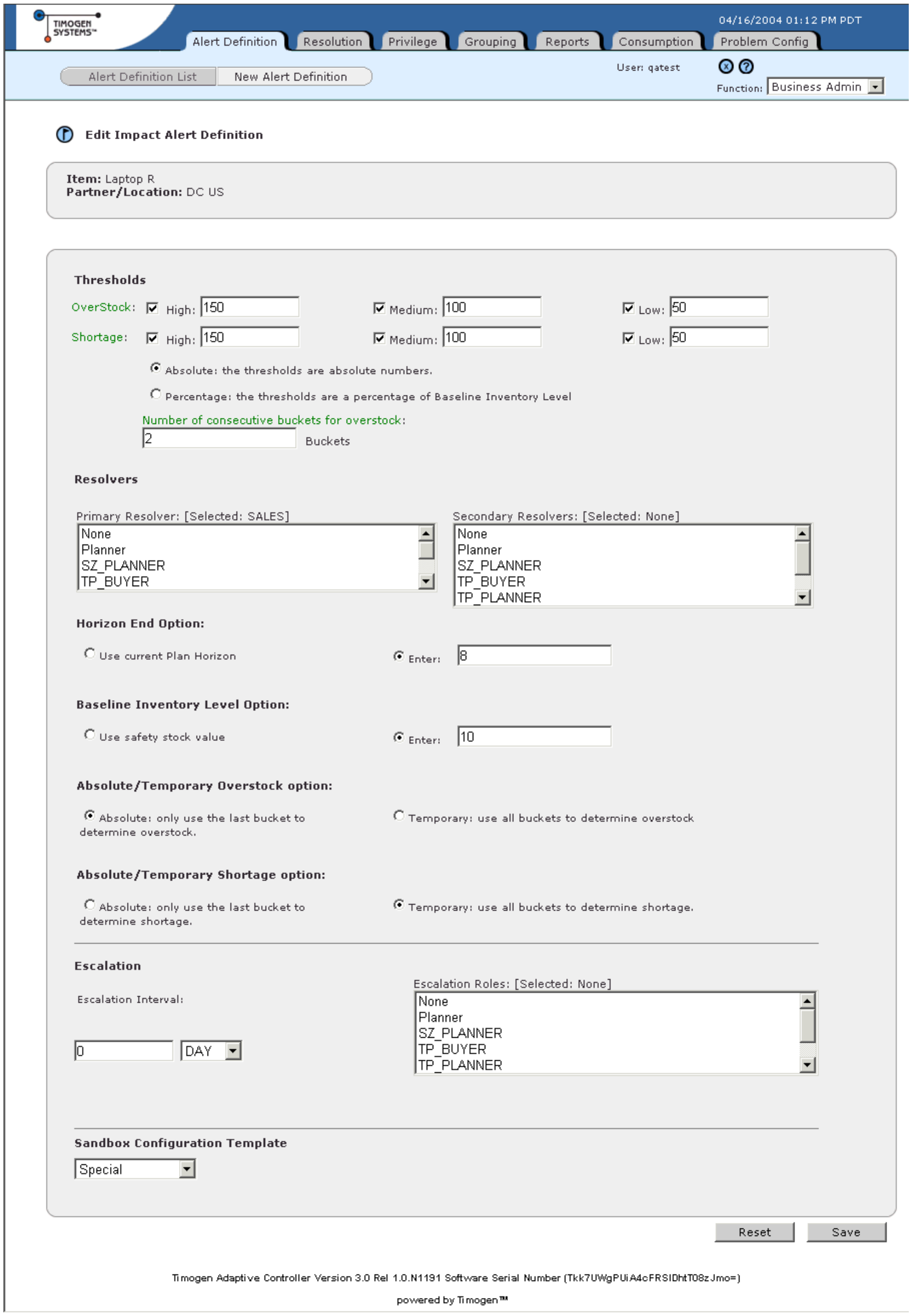
2 Click the **Alert Definition** tab, then click **Alert Definition List**.

3 Click the **Impact Alert** tab.

4 Select one or more Items and Locations (or select Any to search for alerts for any Item or in any Location or Category), then click **Search**.

A list of alerts that fit your selection appears in the Alert Category section.

5 Click for the alert you want to edit. The Edit Impact Alert Definition page appears.



6 Make any desired changes to Thresholds, Resolvers, Options, Escalation, and the Template. (See “Impact Alert Thresholds” on page 105, “Impact Alert Resolvers” on page 105, “Impact Alert Options” on page 106, “Impact Alert Escalation” on

page 106, and "Impact Alert Sandbox Configuration Template" on page 107 for details.

You cannot change the Item or Location of an existing alert.

7 Click **Save**.

Deleting Impact Alert Definitions

If you delete an Event Alert definition, and existing alerts that use that definition will still remain visible on Active or Archive lists.

To delete an Impact Alert definition

1. In the **Role** drop-down list, select **Business Admin**.
2. Click the **Alert Definition** tab, then click **Alert Definition List**.
3. Click the **Impact Alert** tab.
4. Select one or more Items and Locations (or select Any to search for alerts for any Item or in any Location or Category), then click **Search**.

   A list of alerts that fit your selection appears in the Alert Category section.
5. Select the check box at the right end of the line for the alert you want to delete.
6. Click **Delete**.
7. In the confirmation dialog box, click **OK**.

9

Defining Privileges and Groups

Privileges

A Privilege is a defined set of Permissions on a Node Group (set of nodes). Permissions are the capabilities to create, modify, approve, and escalate the different types of orders.

Creating Privileges

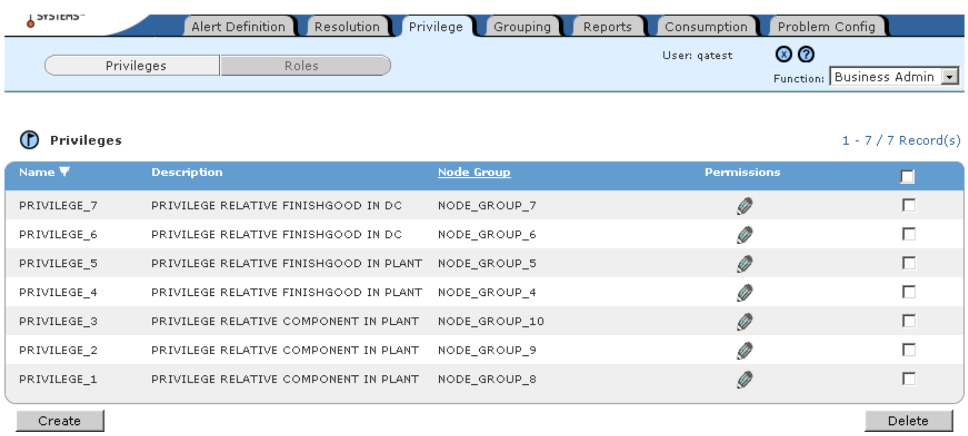
When you create a privilege, you assign it to a Node Group. Make sure the Node Group you want to assign the privilege to exists before creating the privilege. See "Node Groups" on page 121 for more information.

Privileges can be created only by users who have the Business Admin function.

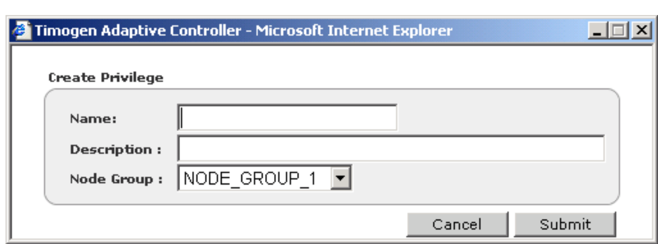
To create a privilege

1 In the Functions drop-down list, select **Business Admin.**

2 Click the **Privileges** tab, then click **Privileges**. The Privileges page appears.

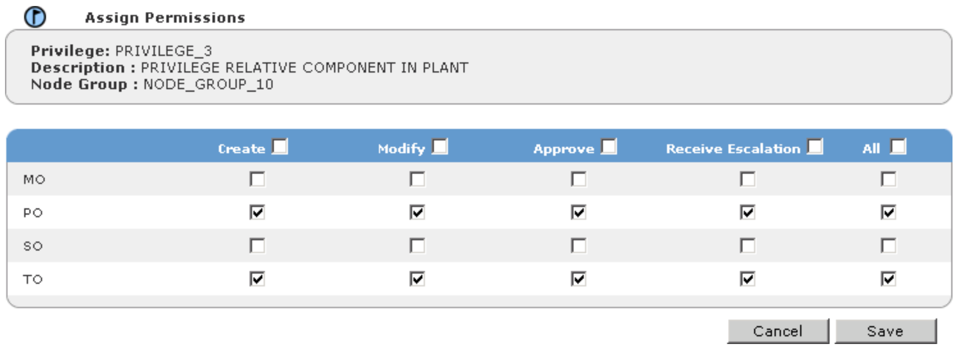


3 Click **Create**. The Create Privilege dialog box appears.



4 Enter a unique, name, a useful description, and select the Node Group that the privilege will apply to, then click **Submit**.

5 In the confirmation dialog box, click **OK**. The Assign Permissions page appears.



6 Select check boxes for permissions for the order types (MO = manufacturing order, PO = purchasing order, SO = sales order, TO = transfer order).

7 Click **Save**.

Editing Privileges

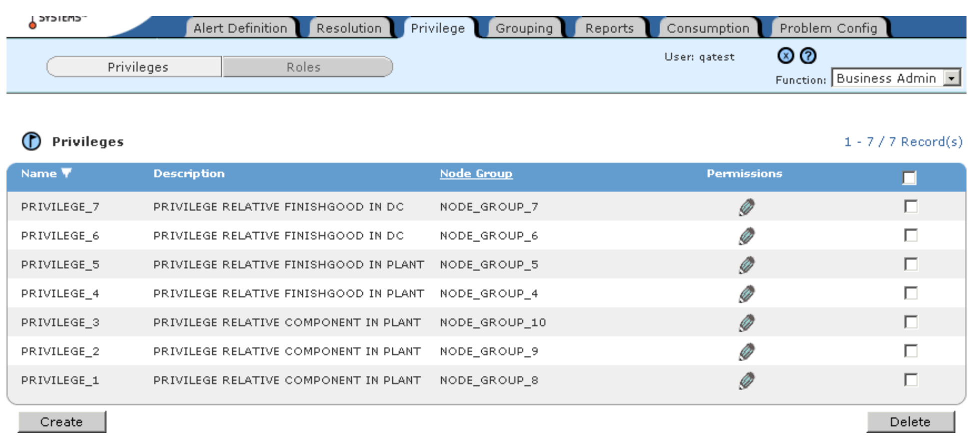
Editing privileges involves changing the permissions for a Node Group.

Privileges can be edited only by users who have the Business Admin function.

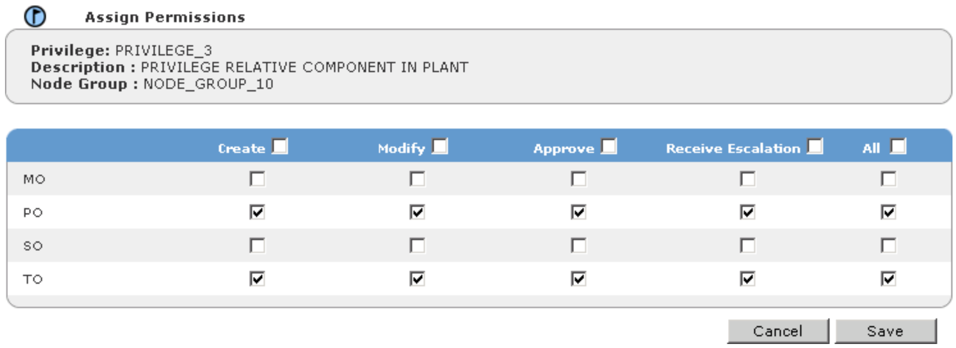
To edit a privilege

1 In the Functions drop-down list, select **Business Admin.**

2 Click the **Privileges** tab, then click **Privileges**. The Privileges page appears.



3 Click for the privilege you want to edit. The Assign Permission page appears.



4 Select or clear check boxes for permissions for the order types (MO = manufacturing order, PO = purchasing order, SO = sales order, TO = transfer order).

5 Click **Save**.

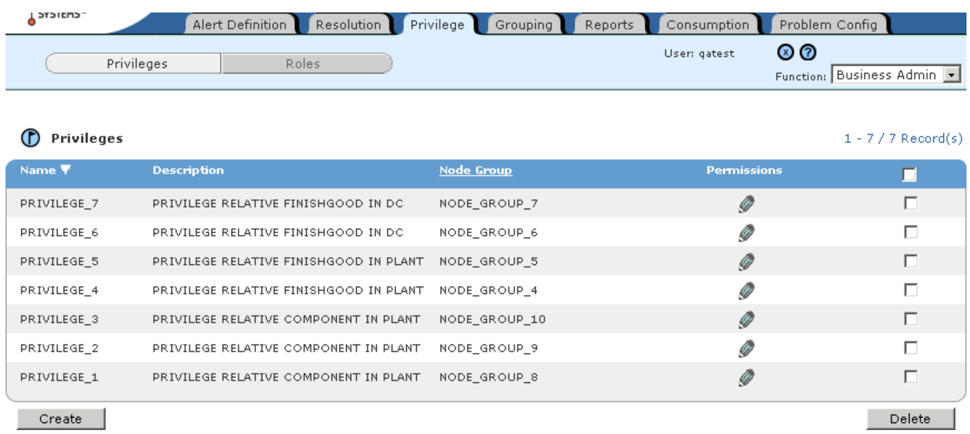
Deleting Privileges

Privileges can be deleted only by users who have the Business Admin function.

To delete a privilege

1 In the Functions drop-down list, select **Business Admin.**

2 Click the **Privileges** tab, then click **Privileges**. The Privileges page appears.



3 Select the check box for the privilege you want to delete.

4 Click **Delete**.

5 In the confirmation dialog box, click **OK**.

Roles

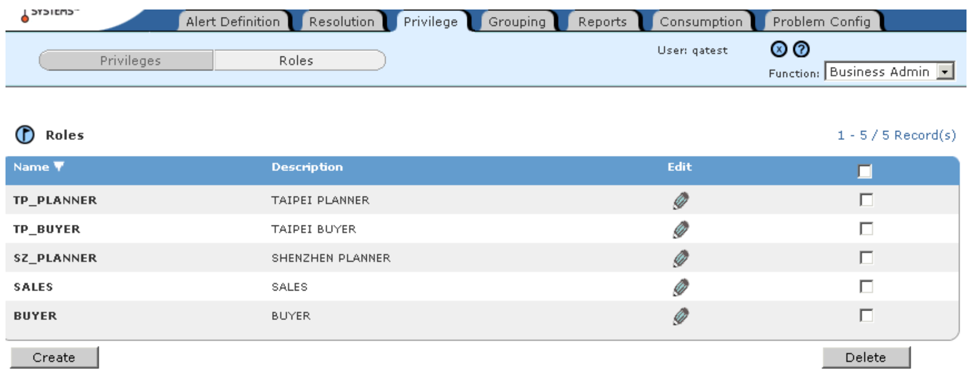
A Role represents a set of Privileges and a set of Users. Roles define who receives and who can take action on (claim, resolve, etc.) alerts.

Creating Roles

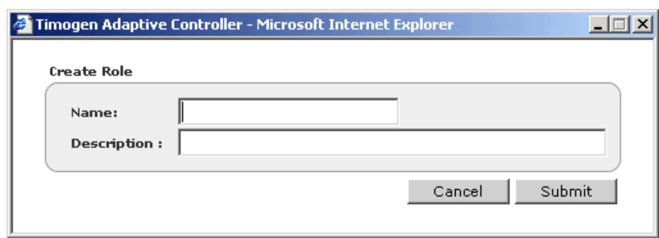
Roles can be created only by users who have the Business Admin function.

To create a role

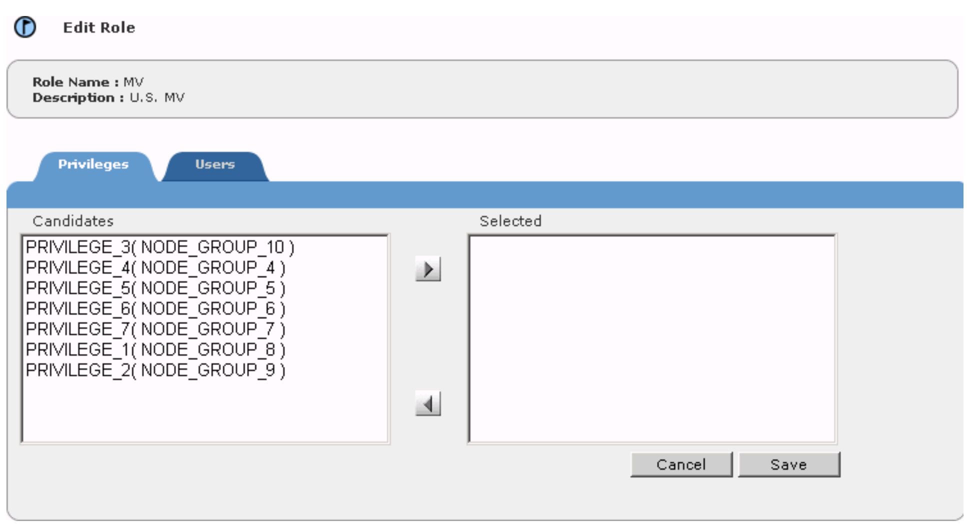
1. In the Functions drop-down list, select **Business Admin.**
2. Click the **Privileges** tab, then click **Roles**. The Roles page appears.



3. Click **Create**. The Create Role dialog box appears.



4. Enter a unique name and a useful description, then click **Submit**.
5. In the confirmation dialog box, click **OK**. The Edit Role page appears.



6. Click the **Privileges** tab.

7 Add privileges to the role.

a. Select one or more privileges in the Candidates list. (Hold down the Ctrl key while clicking to select multiple privileges.)

b. Click . The selected privileges move to the Selected list.

c. Click **Save**.

8 Click the **Users** tab.

9 Add users to the role.

a. Select one or more users. (Hold down the Ctrl key while clicking to select multiple users.)

b. Click . The selected users move to the Selected list.

c. Click **Save**.

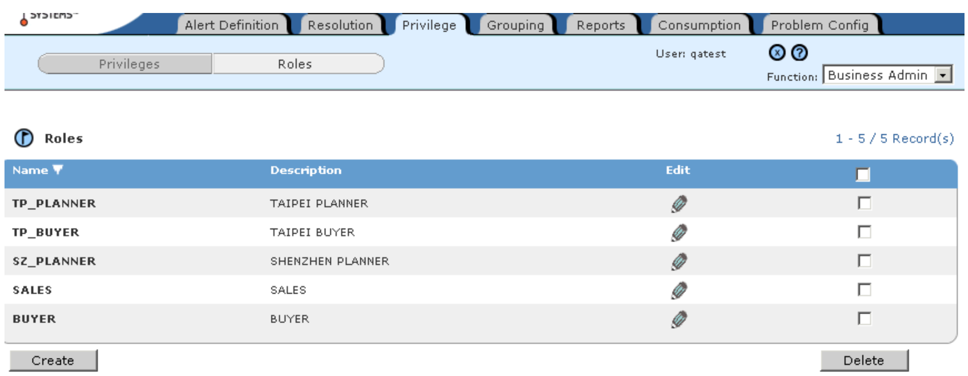
Editing Roles

Roles can be edited only by users who have the Business Admin function.

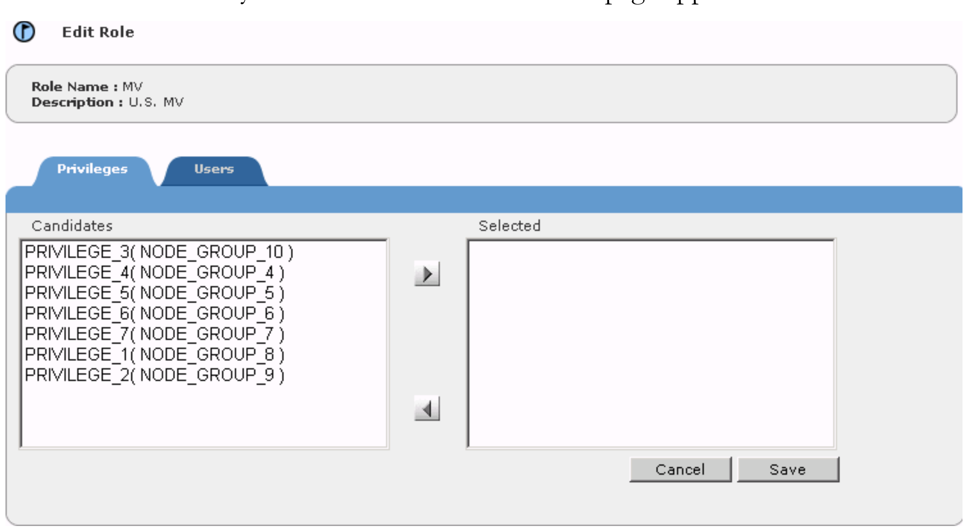
To edit a role

1 In the Functions drop-down list, select **Business Admin.**

2 Click the **Privileges** tab, then click **Roles**. The Roles page appears.



3 Click for the role you want to edit. The Edit Role page appears.



4 Click the **Privileges** tab.

5 Make any desired changes to privileges.

- To add privileges to the role, select one or more privileges in the Candidates list, (hold down the Ctrl key while clicking to select multiple privileges.) click , then click **Save**.
- To remove privileges from the role, select one or more privileges in the Selected list, (hold down the Ctrl key while clicking to select multiple privileges.) click , then click **Save**.

6 Click the **Users** tab.

7 Make any desired changes to users.

- To add users to the role, select one or more users in the Candidates list, (hold down the Ctrl key while clicking to select multiple privileges.) click , then click **Save**.
- To remove users from the role, select one or more users in the Selected list, (hold down the Ctrl key while clicking to select multiple privileges.) click , then click **Save**.

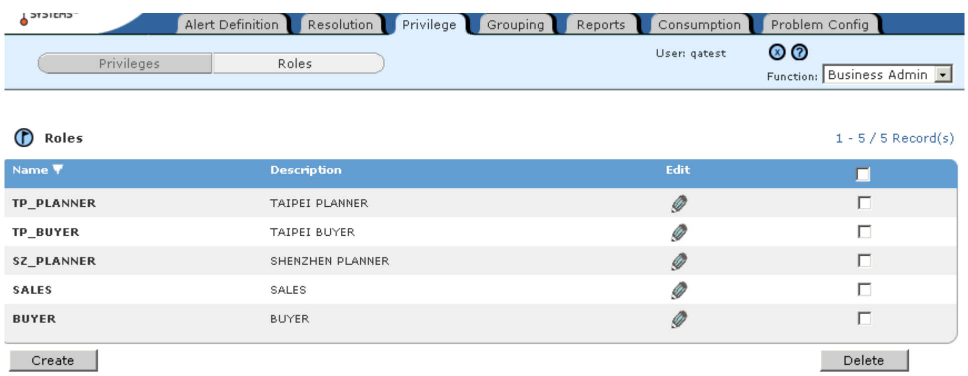
Deleting Roles

Roles can be deleted only by users who have the Business Admin function.

To delete a role

1 In the Functions drop-down list, select **Business Admin.**

2 Click the **Roles** tab, then click **Roles**. The Roles page appears.



3 Select the check box for the role you want to delete.

4 Click **Delete**.

5 In the confirmation dialog box, click **OK**.

Item Groups

An Item Group is a set of one or more items. Grouping a set of similar items can make it easier to monitor them.

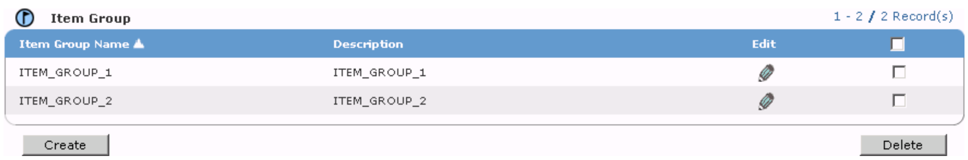
Creating Item Groups

Item groups can be created only by users who have the Business Admin function.

To create an item group

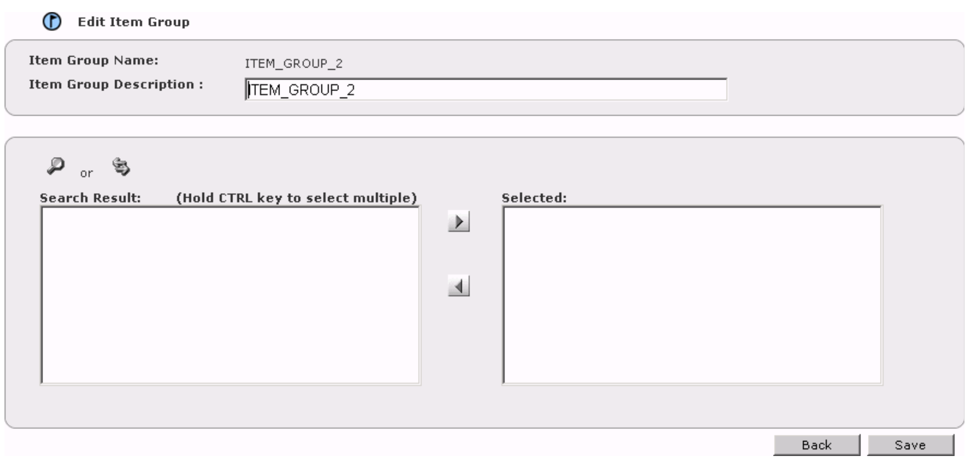
1 In the Functions drop-down list, select **Business Admin**.

2 Click the **Grouping** tab, then click **Item Group**. The Item Group page appears.

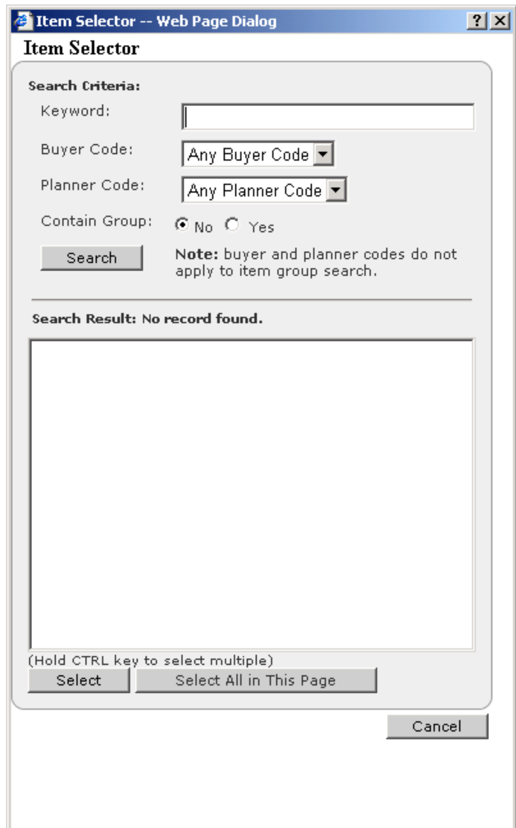


3 Click **Create**. The Create New Item Group dialog box appears.

4 Enter a unique name and a useful description, then click **Submit**. The Edit Item Group page appears.



5 Click . The Item Selector dialog box appears.



6 Click **Search**, select one ore more items in the Search Results, list, then click **Select**. Your selections will appear in the Search Result list on the Edit Item Group page.

7 In the Search Result list, select one or more items (Hold down the Ctrl key while clicking to select multiple items.)

8 Click . The selected items are moved to the Selected list.

9 Click **Save**.

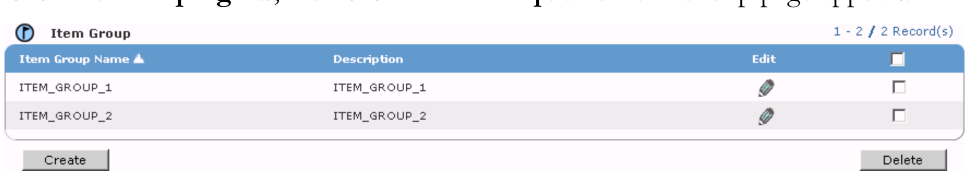
Editing Items Groups

Item groups can be edited only by users who have the Business Admin function.

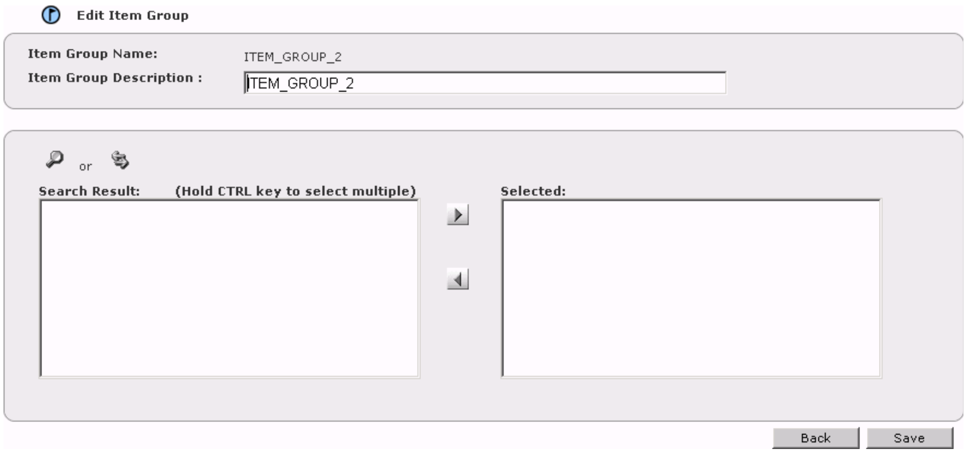
To edit an item group

1 In the Functions drop-down list, select **Business Admin**.

2 Click the **Grouping** tab, then click **Item Group**. The Item Group page appears.



3 Click for the Item Group you want to edit.The Edit Item Group page appears.



4 Make any desired changes.

- To add items to the Item Group, select them in the n the Search Result list (hold down the Ctrl key while clicking to select multiple items), then click . The selected items are moved to the Selected list.

  If the items you want to add are not in the Search Result list, click , then in the Item Selector dialog box, click **Search**, select one ore more items in the Search Results, list, then click **Select**. Your selections will appear in the Search Result list on the Edit Item Group page.

- To remove items from the Item Group, select them in the Selected list (hold down the Ctrl key while clicking to select multiple items), then click .

5 Click **Save**.

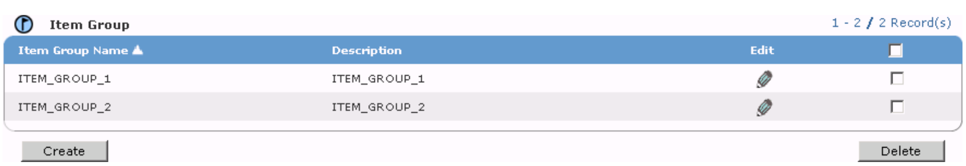
Deleting Item Groups

Item groups can be deleted only by users who have the Business Admin function.

To delete an item group

1 In the Functions drop-down list, select **Business Admin**.

2 Click the **Grouping** tab, then click **Item Group**. The Item Group page appears.



3 Select the check box(es) for the item(s) you want to delete.

4 Click **Delete**.

5 In the confirmation dialog box, click **OK**.

Node Groups

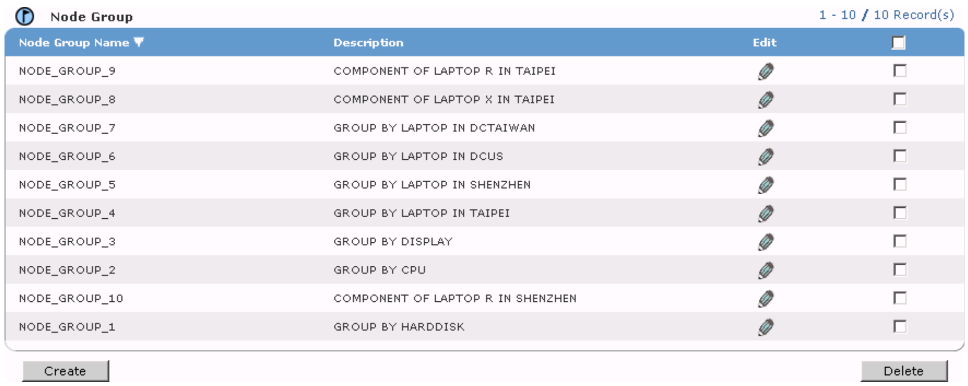
A Node Group is a set of Items and Locations. A Node Group can be used in any place a single node can be, which can be useful for managing and organizing alerts.

Creating Node Groups

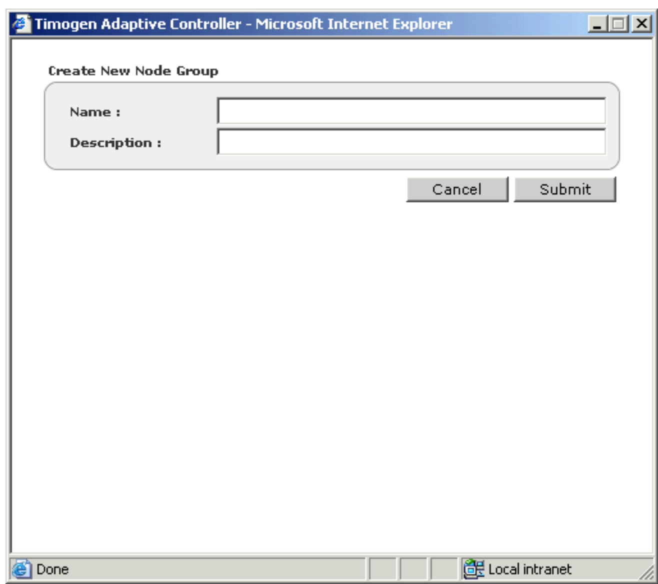
Node groups can be created only by users who have the Business Admin function.

To create a node group

1. In the Functions drop-down list, select **Business Admin**.
2. Click the **Grouping** tab, then click **Node Group**. The Node Group page appears.



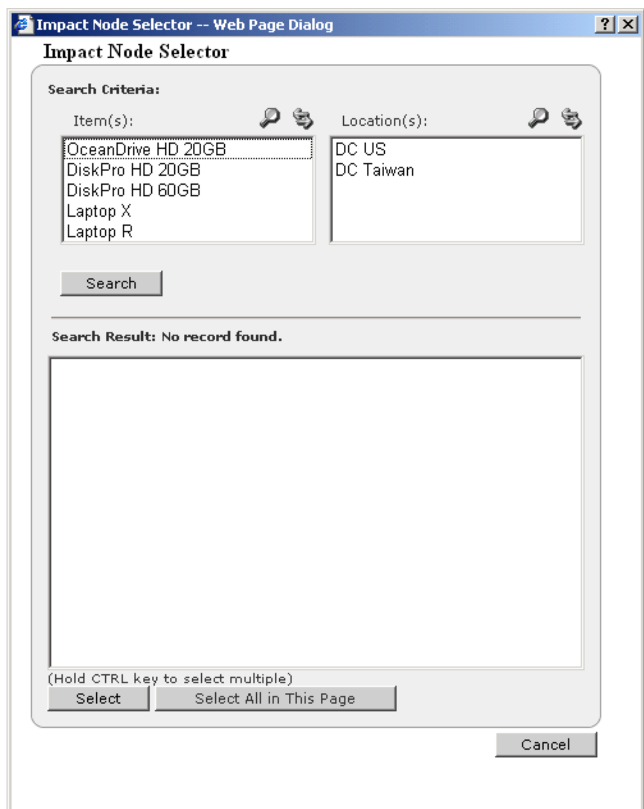
3. Click **Create**. The Create New Node Group dialog box appears.



4 Enter a unique name and a useful description, then click **Submit**. The Edit Node Group page appears.

5 Add nodes to the Node Group.

a. On the Nodes tab, Click . The Impact Node Selector dialog box appears.



b. Select one or more Items and Locations. (Hold down the Ctrl key when clicking to select more than one.) If the Item or Location you want to select is not in the list, click to find and add to the list.

c. Click **Search**.

d. In the Search Results list, select one or more Nodes. (Hold down the Ctrl key when clicking to select more than one.)

e. Click **Select**.

f. In the Selected list, select the Nodes you want to add to the Node Group. (Hold down the Ctrl key when clicking to select more than one.)

g. Click **Add**.

6 On the Buyer Codes tab, select the check box(es) for the buyer code(s) you want to add to the Node Group, then click **Add**. In the conformation dialog box, click **OK**.

7 On the Planner Codes tab, select the check box(es) for the planner code(s) you want to add to the Node Group, then click **Add**. In the conformation dialog box, click **OK**.

8 On the CSR (Customer Sales Rep) Codes tab, select the check box(es) for the CSR code(s) you want to add to the Node Group, then click **Add**. In the conformation dialog box, click **OK**.

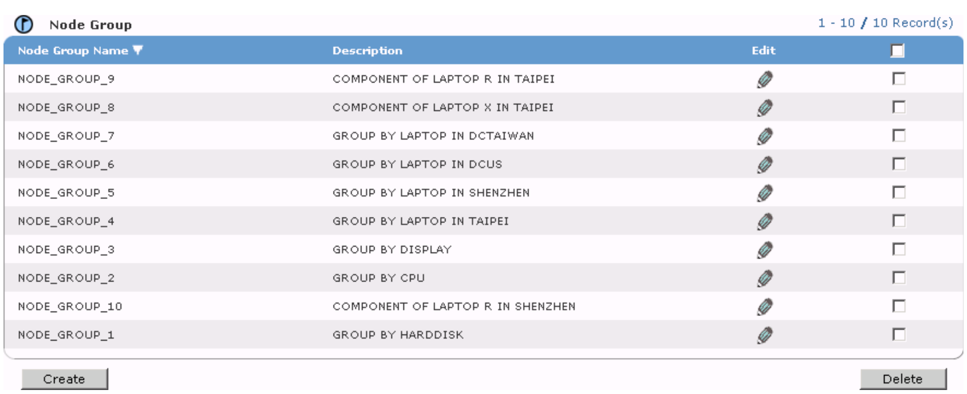
9 On the Material Groups tab, select the check box(es) for the material group(s) you want to add to the Node Group, then click **Add**. In the conformation dialog box, click **OK**.

Viewing Node Group Nodes

To view the nodes in a Node Group

1 In the Functions drop-down list, select **Business Admin**.

2 Click the **Grouping** tab, then click **Node Group**. The Node Group page appears.



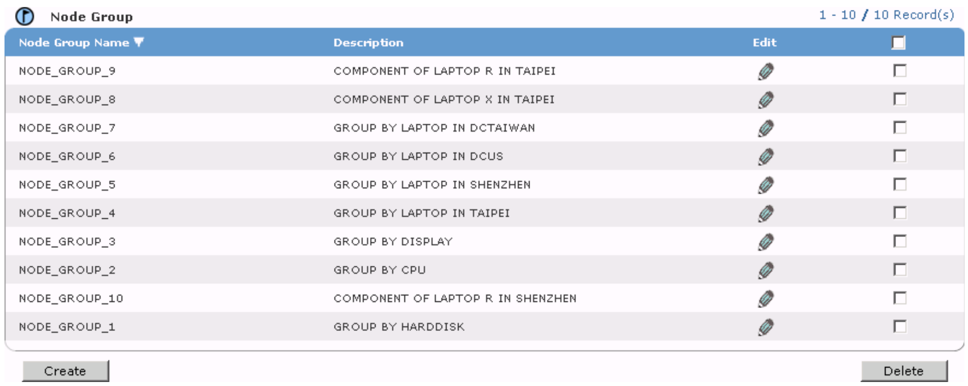
3 Click **View All Nodes**.

Editing Node Groups

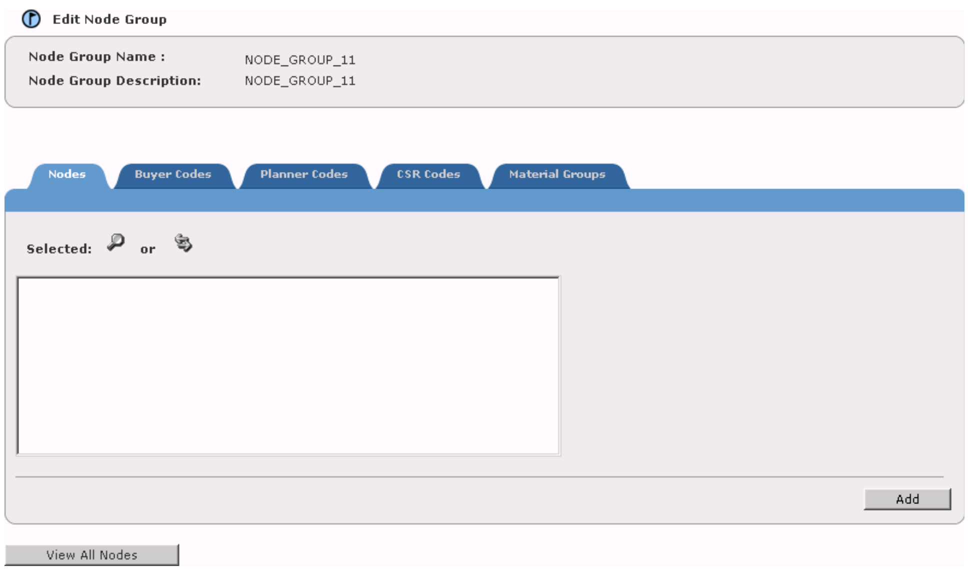
Node groups can be edited only by users who have the Business Admin function.

To edit a node group

1. In the Functions drop-down list, select **Business Admin**.
2. Click the **Grouping** tab, then click **Node Group**. The Node Group page appears.

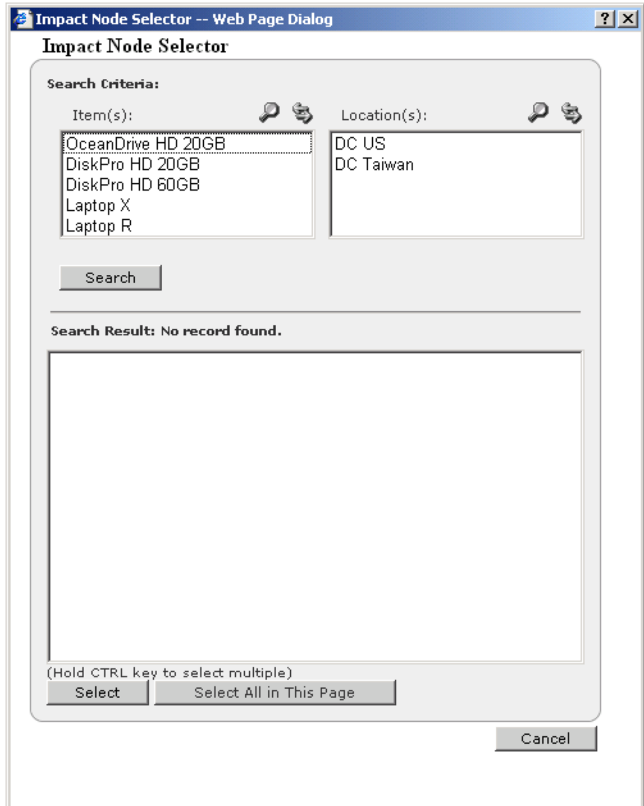


3. Click . The Edit Node Group page appears.



4. To add nodes to the Node Group:

a. On the Nodes tab, click . The Impact Node Selector dialog box appears.



b. Select one or more Items and Locations. (Hold down the Ctrl key when clicking to select more than one.) If the Item or Location you want to select is not in the list, click to find and add to the list.

c. Click **Search**.

d. In the Search Results list, select one or more Nodes. (Hold down the Ctrl key when clicking to select more than one.)

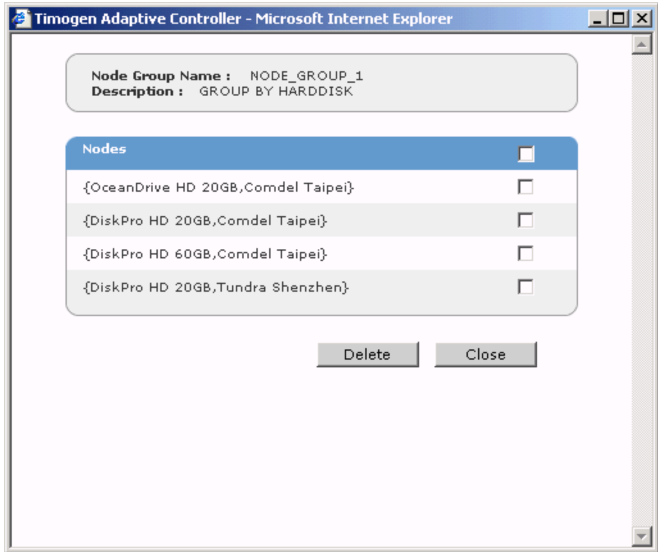
e. Click **Select**.

f. In the Selected list, select the Nodes you want to add to the Node Group. (Hold down the Ctrl key when clicking to select more than one.)

g. Click **Add**.

5 To delete nodes from the Node Group:

a. Click **View All Nodes**. The Nodes dialog box appears.



b. Select the check box(es) for the nodes you want to remove from the Node Group.

c. Click **Delete**.

d. In the confirmation dialog box, click **OK**.

6 On the Buyer Codes tab, select the check box(es) for the buyer code(s) you want to add to the Node Group and clear the check box(es) for the buyer code(s) you want to remove from the Node Group, then click **Add**. In the conformation dialog box, click **OK**.

7 On the Planner Codes tab, select the check box(es) for the planner code(s) you want to add to the Node Group and clear the check box(es) for the planner code(s) you want to remove from the Node Group, then click **Add**. In the conformation dialog box, click **OK**.

8 On the CSR (Customer Sales Rep) Codes tab, select the check box(es) for the CSR code(s) you want to add to the Node Group and clear the check box(es) for the CSR code(s) you want to remove from the Node Group, then click **Add**. In the conformation dialog box, click **OK**.

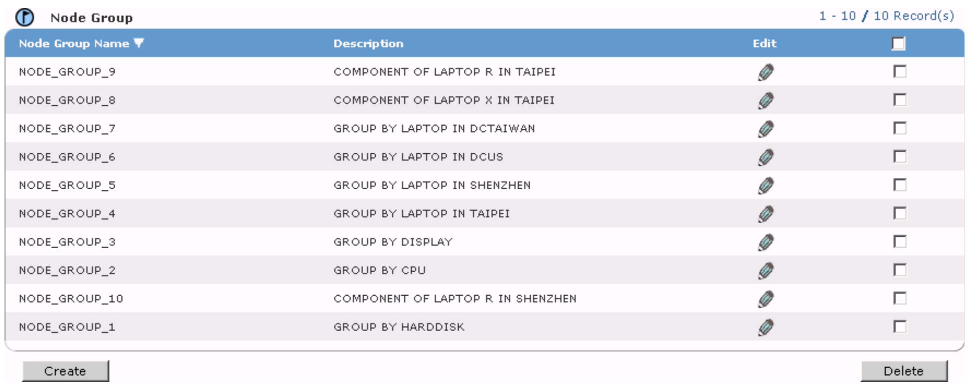
9 On the Material Groups tab, select the check box(es) for the material group(s) you want to add to the Node Group and clear the check box(es) for the material group(s) you want to remove from the Node Group, then click **Add**. In the conformation dialog box, click **OK**.

Deleting Node Groups

Node groups can be edited only by users who have the Business Admin function.

To delete a node group

1. In the Functions drop-down list, select **Business Admin**.
2. Click the **Grouping** tab, then click **Node Group**. The Node Group page appears.



3. Select the check box(es) for the node(s) you want to delete.
4. Click **Delete**.
5. In the confirmation dialog box, click **OK**.

10

Resolution Process Definitions

A Resolution Process Definition comprises several Resolution Task Definitions and is used to resolve Impact Alerts. Task definitions define parameters for the tasks that can be done at a Node Group. A Resolution Process Definition is created automatically for every Node Group. See "Resolution Process" on page 68 and "Node Groups" on page 121.

Resolution Process Definitions can be defined only by users who have the Business Admin function.

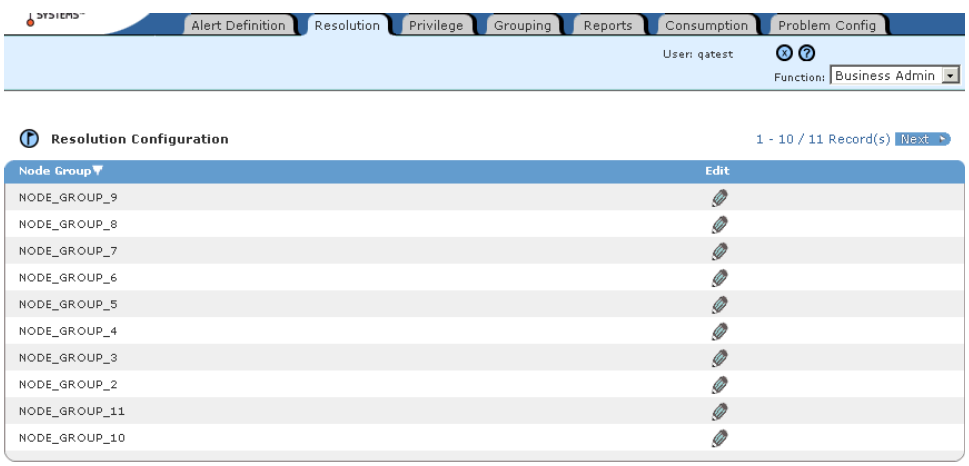
Editing Resolution Process Definitions

Resolution Process Definitions can be edited only by users who have the Business Admin function.

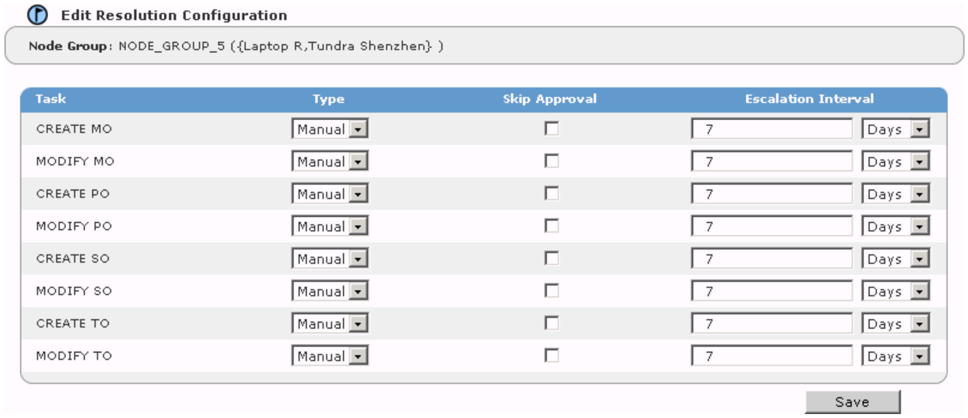
To edit a resolution process definition

1 In the Functions drop-down list, select **Business Admin.**

2 Click the **Resolution** tab. The Resolution Configuration page appears.



3 Click for the Node Group you want to edit the Resolution Configuration for. The Edit Resolution Configuration page appears.



4 For each possible task in the Node Group, make any changes to its definition.

Field Name	Description
Task	The various tasks that can be configured.
Type	Select the type of Resolution Task Definition: • Automatic - The task will be performed automatically. • Manual - The task will be performed manually, outside the Timogen Adaptive Controller system. Task reconciliation must also be done manually.
Skip Approval	Select if approval for this task on this Node Group is not required.
Escalation Interval	When a task is not completed within a specified time, the resolution can be escalated to an additional set of individuals. Enter a number for the Escalation Interval and select hours or days.

5 Click **Save**.

11

Problem Configuration Templates

Problem Configuration Templates are used to develop and configure a Problem Configuration within a sandbox (see "Configuring Sandboxes" on page 47) and resolve Impact Alerts. Problem Configuration Templates can be pre-configured and stored in the system by the Business Admin user. You can create a new Problem Configuration template and edit and delete existing Problem Configuration templates.

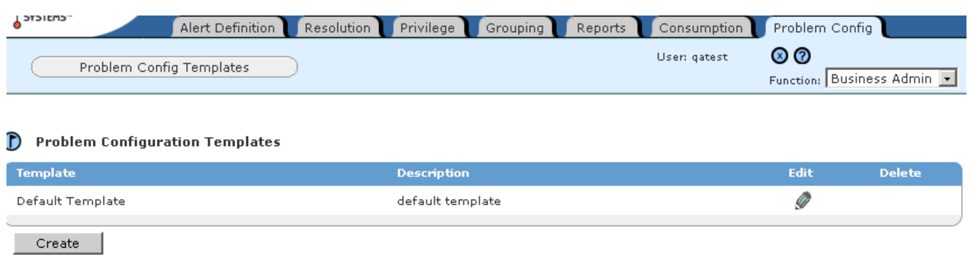
Timogen Adaptive Controller provides a default template, which can be changed, but not deleted.

Creating Problem Configuration Templates

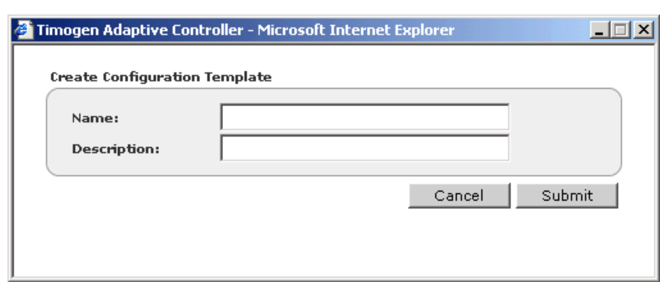
Problem Configuration Templates can be created only by users who have the Business Admin function.

To create a problem configuration template

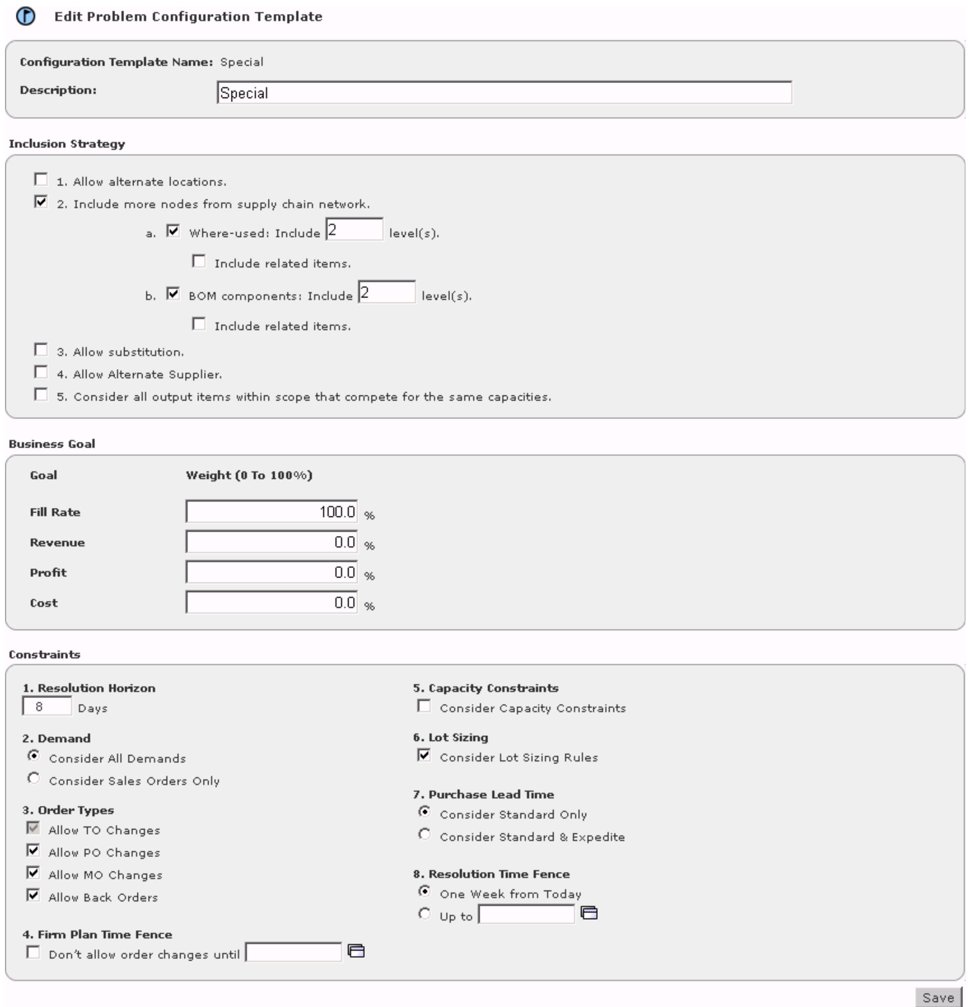
1. In the Functions drop-down list, select **Business User.**
2. Click the **Problem Config** tab. The Problem Configuration Templates page appears.



3. Click **Create**. The Create Configuration Template dialog box appears.



4 Enter a unique name and a meaningful description, then click **Submit**. The Edit Problem Configuration Template page appears.



5 Define the inclusion strategy, business goals, and constraints for the template:

Field Name	Description
Configuration Template Name	The name of the configuration template.
Description	The description of the configuration template. You can enter a new description for the template.

Field Name	Description
Inclusion Strategy	The Inclusion Strategy specifies the impact nodes to be included in the scope, plus additional strategy parameters to describe additional scoping details: • Allow Alternate Location - Allows inclusion of more locations for the same item from the initial impact node. • Allows going along the BOM/BOD to pull more impact nodes into the scope. If selected, also enter the number of levels and if related items should be included on those levels. • Allows substitutions (alternate components) globally within the scope • Allows alternate suppliers within the scope. • Includes all output items within scope that compete for the same capacity to bring the competing items into the scope.
Business Goals	Assign a numerical weight for each objective (Fill Rate, Revenue, Profit, Cost) of your Business Goals. The weights must add upto 100%.
Constraints	You can define the business rules further, either locally or globally. The various constraints that can be specified are: • Resolution Horizon - Enter the number of days to look out for solutions. • Demand - Select whether to consider all demand or to limit consideration to sales orders only. • Order Types - Select the check boxes for the changes you want to allow when creating resolutions. • Firm Plan Time Fence - Select to not allow order changes until change within standard lead time and enter a date (or click to select a date). • Capacity Constraints - Select to take capacity into consideration when creating resolutions. • Lot Sizing - Select to take lot sizing into consideration when creating resolutions. • Purchase Lead Time - Select an option to use just standard lead time or to use standard and expedited lead times. • Resolution Time Fence - Select the time fence for resolution consideration, either a week from the current date or enter a date (or click to select a date).

6 Click **Save**.

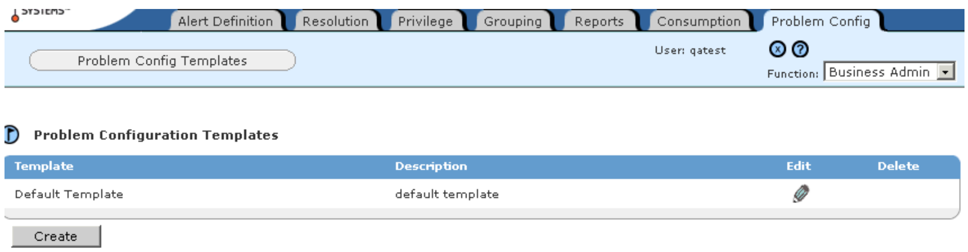
Editing Problem Configuration Templates

Problem Configuration Templates can be edited only by users who have the Business Admin function.

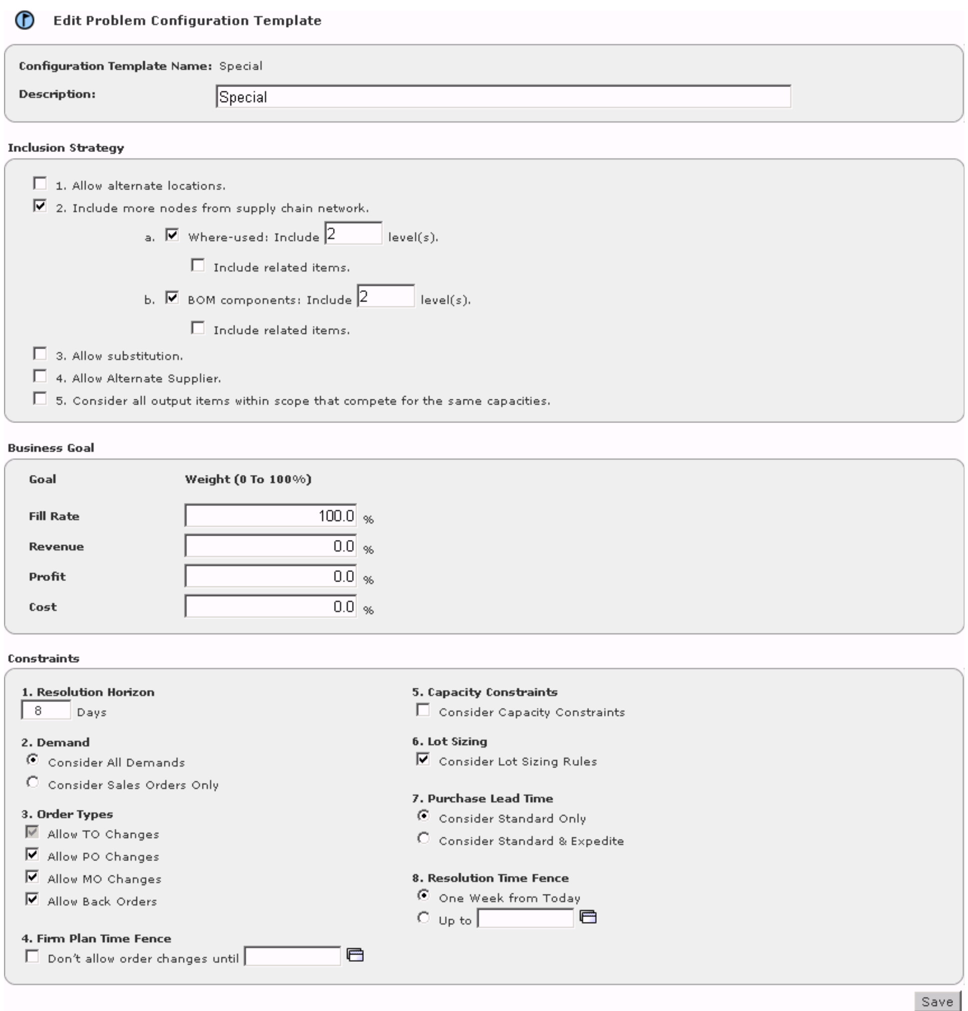
To edit a problem configuration template

1 In the Functions drop-down list, select **Business User.**

2 Click the **Problem Config** tab. The Problem Configuration Templates page appears.



3 Click for the Problem Configuration Template you want to edit. The Edit Problem Configuration Template page appears.



4 Make any desired changes to the inclusion strategy, business goals, and constraints for the template:

Field Name	Description
Configuration Template Name	The name of the configuration template.
Description	The description of the configuration template. You can enter the new description for the template.
Inclusion Strategy	The Inclusion Strategy specifies the impact nodes to be included in the scope, plus additional strategy parameters to describe additional scoping details: • Allow Alternate Location - Allows inclusion of more locations for the same item from the initial impact node. • Allows going along the BOM/BOD to pull more impact nodes into the scope. If selected, also enter the number of levels and if related items should be included on those levels. • Allows substitutions (alternate components) globally within the scope • Allows alternate suppliers within the scope. • Includes all output items within scope that compete for the same capacity to bring the competing items into the scope.
Business Goals	Assign a numerical weight for each objective (Fill Rate, Revenue, Profit, Cost) of your Business Goals. The weights must add upto 100%.
Constraints	You can define the business rules further, either locally or globally. The various constraints that can be specified are: • Resolution Horizon - Enter the number of days to look out for solutions. • Demand - Select whether to consider all demand or to limit consideration to sales orders only. • Order Types - Select the check boxes for the changes you want to allow when creating resolutions. • Firm Plan Time Fence - Select to not allow order changes until change within standard lead time and enter a date (or click to select a date). • Capacity Constraints - Select to take capacity into consideration when creating resolutions. • Lot Sizing - Select to take lot sizing into consideration when creating resolutions. • Purchase Lead Time - Select an option to use just standard lead time or to use standard and expedited lead times. • Resolution Time Fence - Select the time fence for resolution consideration, either a week from the current date or enter a date (or click to select a date).

5 Click **Save**.

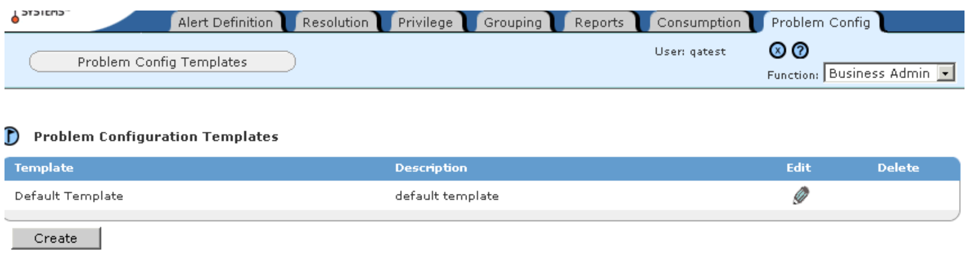
Deleting Problem Configuration Templates

Problem Configuration Templates can be deleted only by users who have the Business Admin function.

Note: You cannot delete the default template.

To delete a problem configuration template

1. In the Functions drop-down list, select **Business User.**
2. Click the **Problem Config** tab. The Problem Configuration Templates page appears.



3. Select the check box for the template you want to delete.
4. Click **Delete**.
5. In the confirmation dialog box, click **OK**.

12

Defining Scheduled Reports

The Business Admin user can schedule reports to be run periodically. Timogen Adaptive Controller provides five types of reports:

- Alert Summary reports
- Inventory Detail reports
- PO vs. Forecast reports
- Related POs reports
- Inventory Summary by Location reports.

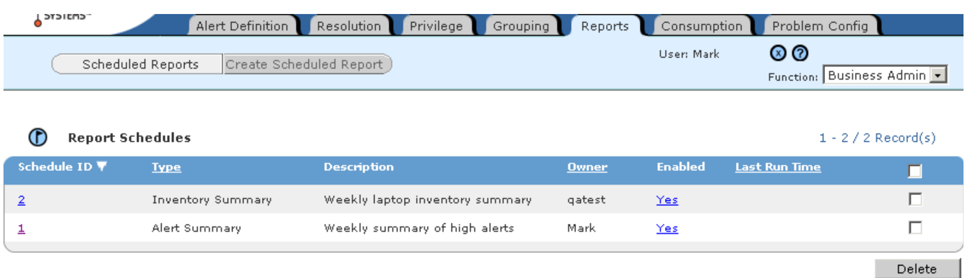
For each report you define, you can specify several criteria and the report generation schedule. Every time a scheduled report is run, it overwrites the previous version of that report.

Creating Scheduled Reports

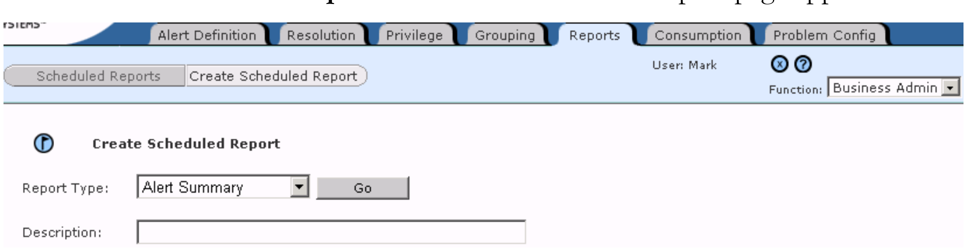
Only users who have Business Admin function can create scheduled reports.

To create a scheduled report

1. In the Function drop-down list, select **Business Admin**.
2. Click the **Reports** tab. The Report Schedules page appears.



3. Click **Create Scheduled Report**. The Create Scheduled Report page appears.



4 Select a Report Type and enter a useful Description.

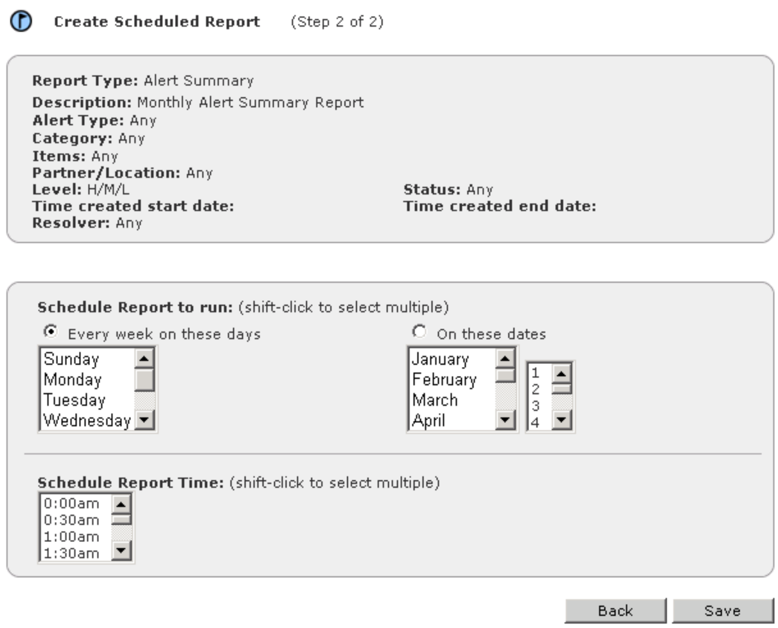
The text you enter in the Description field will help you differentiate different reports of the same type.

5 Click **Go**. The Create Scheduled Report page appears for the report type you selected.

6 Enter the details you want in the report. For explanations of detail options, see:

- “Alert Summary Report Details” on page 141
- “Inventory Detail Report Details” on page 142
- “PO vs. Forecast Report Details” on page 143
- “Related POs Report Details” on page 144
- “Inventory Summary Report Details” on page 145

7 Click **Next**. Part 2 of the Create Scheduled Report page appears.



8 Select the day(s) or date(s) and the time(s) that the report will run.

9 Click **Save**.

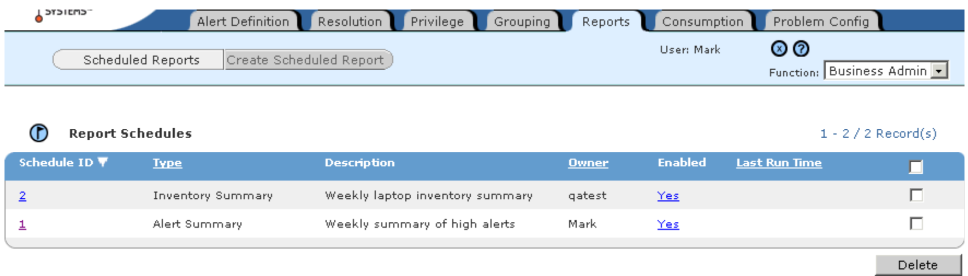
Editing Scheduled Reports

Only users who have Business Admin function can edit scheduled reports.

To edit a scheduled report

1 In the Function drop-down list, select **Business Admin**.

2 Click the **Reports** tab. The Report Schedules page appears.

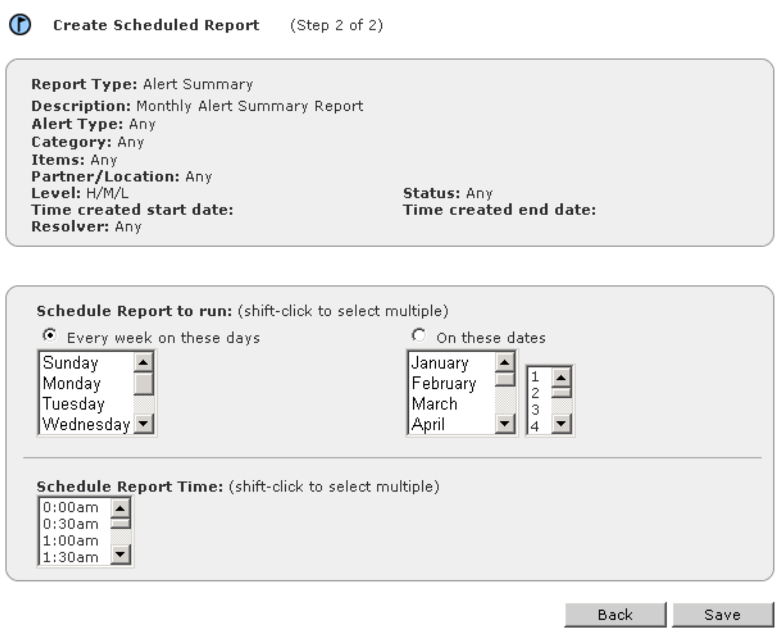


3 Click the report number of the scheduled report you want to edit.

4 Make any desired changes to the details you want in the report. For explanations of detail options, see:

- "Alert Summary Report Details" on page 141
- "Inventory Detail Report Details" on page 142
- "PO vs. Forecast Report Details" on page 143
- "Related POs Report Details" on page 144
- "Inventory Summary Report Details" on page 145

5 Click **Next**. Part 2 of the Update Scheduled Report page appears.



6 Make any desired changes to the day(s) or date(s) and the time(s) that the report will run.

7 Click **Save**.

Enabling/Disabling Scheduled Reports

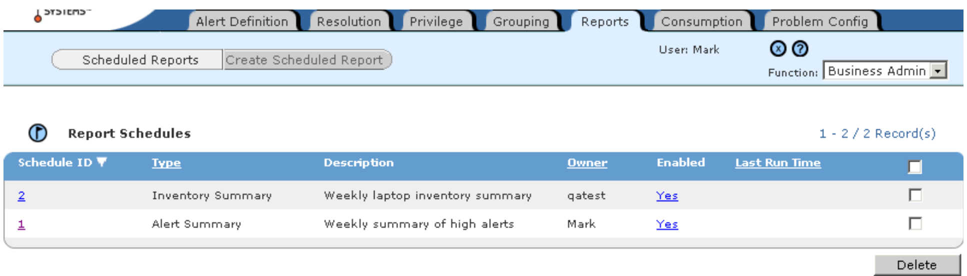
When a scheduled report is created, it is enabled by default and a new report will be generated according to the designated schedule. If you do not want to report to run, you can disable it rather then deleting it.

Only users who have Business Admin function can enable or disable scheduled reports.

To enable or disable a scheduled report

1 In the Function drop-down list, select **Business Admin**.

2 Click the **Reports** tab. The Report Schedules page appears.



3 In the Enabled column, click the **Yes** or **No** link:

If the scheduled report is enabled, the link will be *Yes*. Click **Yes**. It will change to *No*.

If the scheduled report is disabled, the link will be *No*. Click **No**. It will change to *Yes*.

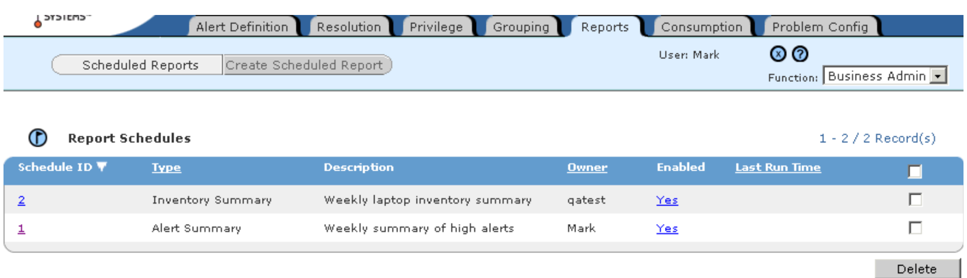
Deleting Scheduled Reports

Only users who have Business Admin function can delete scheduled reports.

To delete a scheduled report

1 In the Function drop-down list, select **Business Admin**.

2 Click the **Reports** tab. The Report Schedules page appears.



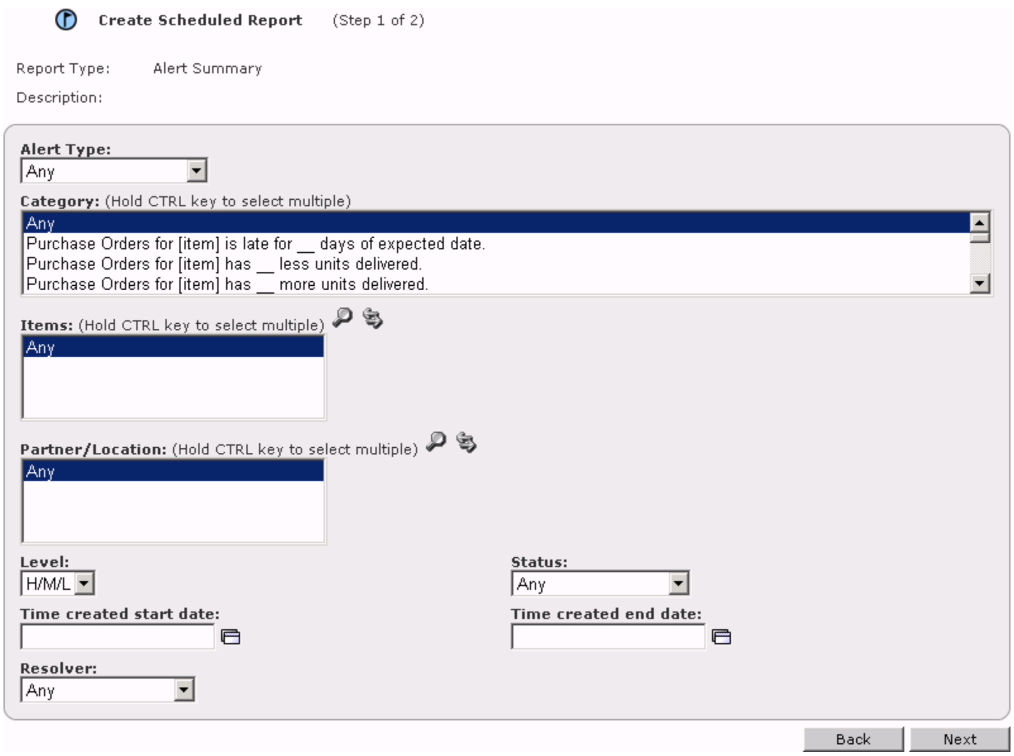
3 Select the check box for the scheduled report you want to delete.

4 Click **Delete**.

5 In the confirmation dialog box, click **OK**.

Alert Summary Report Details

The Alert Summary Report definition page contains the following fields:

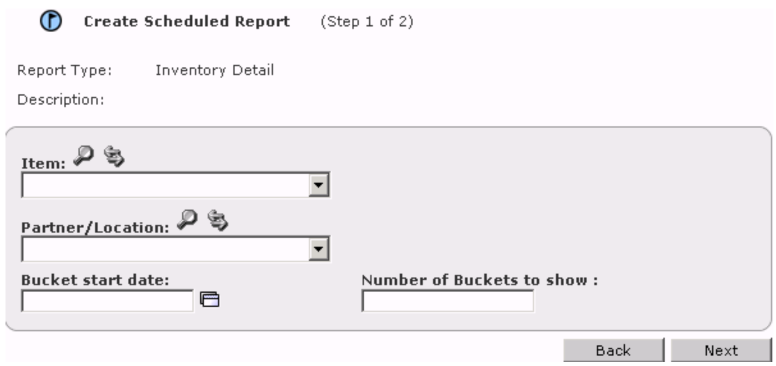


Field Name	Description
Alert Type	Select to include any alerts or only Impact or Event Alerts in the report.
Category	Specify one or more categories of alerts to include in the report, or select Any to include all categories.
Items	Select one or more Items to be included in the report
Partner/Location	Select one or more Partner(s)/Location(s) to be included in the report.
Level	Select the level of the alerts that are to be included in the report. You can choose: • H/M/L - Alerts of all levels - High, Medium and Low will be included in the report • H/M - Only High and Medium level alerts will be included in the report. • H - Only High level alerts will be included in the report.
Status	Select the status of the alerts to be included in the report from Any, Active, In Progress, Closed, or Escalated.
Time Created Start/ End Date	Specify the Start and End dates for the report.

Field Name	Description
Resolver	Select an alert resolver to limit the report to only the alerts to be resolved by the selected user.
Resolution	Select the Resolution status to be included in the report from Not Started, Running, Completed, or Aborted.

Inventory Detail Report Details

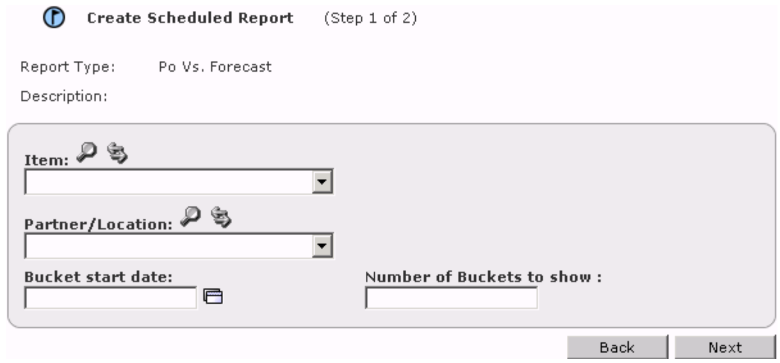
The Inventory Detail Report definition page contains the following fields:



Field Name	Description
Item	Select one or more Items to be included in the report.
Partner/Location	Select one or more Partners/Locations to be included in the report.
Bucket Start Date	Companies may wish to view data on a daily basis, once in five days, seven days, month etc. This time period is defined during product installation and is referred to as a 'Time Bucket.' Select the Bucket Start Date to set the beginning time to be considered.
Number of Buckets to show	Select the Number of Buckets to show to set the granularity of the report.

PO vs. Forecast Report Details

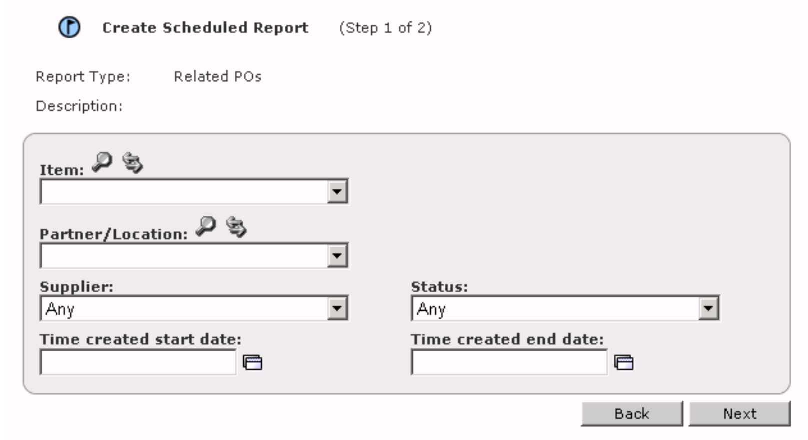
The PO vs. Forecast Report definition page contains the following fields:



Field Name	Description
Item	Select one or more Items to be included in the report.
Partner/Location	Select one or more Partners/Locations to be included in the report.
Bucket Start Date	Companies may wish to view data on a daily basis, once in five days, seven days, month etc. This time period is defined during product installation and is referred to as a 'Time Bucket.' Select the Bucket Start Date to set the beginning time to be considered.
Number of Buckets to show	Select the Number of Buckets to show to set the granularity of the report.

Related POs Report Details

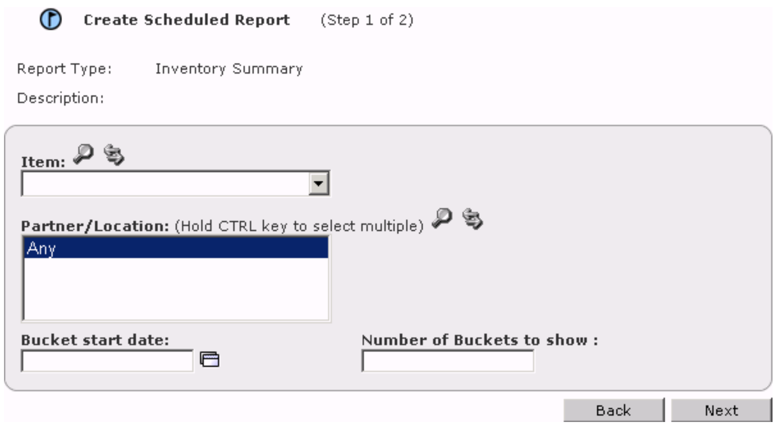
The Related POs Report definition page contains the following fields:



Field Name	Description
Item	Select one or more Items to be included in the report.
Partner/Location	Select one or more Partners/Locations to be included in the report.
Supplier	Select the supplier to be included in the report.
Status	Select the status of the POs to be included in the report from Created, Accepted, Shipped, Changed, Partial, Completed, or Canceled, or select Any to include All POs.
Time Created Start/End Date	Specify the time period to be included in the report.

Inventory Summary Report Details

The Inventory Summary Report definition page contains the following fields:



Field Name	Description
Item	Select one or more Items to be included in the report.
Partner/Location	Select one or more Partners/Locations to be included in the report.
Bucket Start Date	Companies may wish to view data on a daily basis, once in five days, seven days, month etc. This time period is defined during product installation and is referred to as a 'Time Bucket.' Select the Bucket Start Date to set the beginning time to be considered.
Number of Buckets to show	Select the Number of Buckets to show to set the granularity of the report.

13

Reconciliation/Consumption

Planned orders, actual orders and resolution tasks need to be reconciled with the data from the ERP system. Each transaction that needs to be reconciled will invoke one or more reconciliators that perform the reconciliation task.

The Consumption tab lists all demand nodes. You can edit the forecast consumptions settings for each demand node.

Editing Demand Node Consumption Configuration

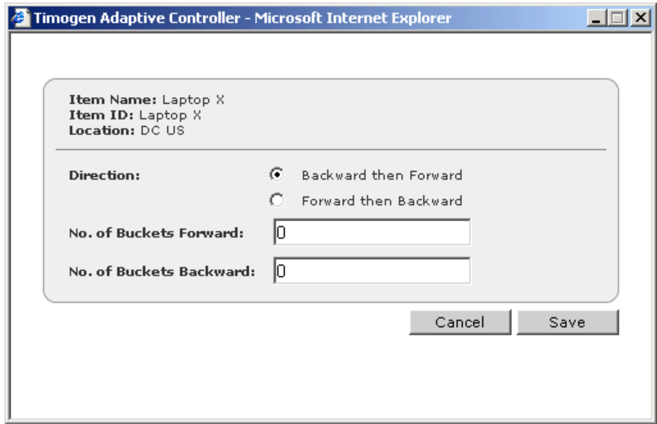
Only users who have Business Admin function can edit demand node consumption configuration.

To edit demand node consumption configuration

1 In the Function drop-down list, select **Business Admin**.

2 Click the **Consumption** tab. The Sales Forecast Consumption page appears.

3 Click for the demand node you want to edit. The Demand Node dialog box appears.



4 Make any desired changes to the demand node consumption configuration:

Field Name	Description
Direction	Select the direction: • Backward then Forward • Forward then Backward
No. of Buckets Forward	Specify the number of buckets forward.
No. of Buckets Backward	Specify the number of buckets backward.

Sales forecast data is presented in daily buckets. Companies may wish to view data on a daily basis, once in five days, seven days, month etc. This time period is referred to as a ‘Time Bucket’ and can be configured.

5 Click **Save**.

Part 3 Technical Admin

The Technical Admin users deal with the technical aspects of system configuration and deployment. They are responsible for the following:

- Creating Users and Functions and assigning passwords.
- Creating the Data Acquisition components that provide interpretation, data exchange and data gathering services between the Timogen Adaptive Controller and other ERP, CRM systems involved in supply chain and order fulfillment activities.
- Scheduling data cleanup activities.
- Setting up company and partner profiles.

Section 3 covers the following topics:

14

User Management

User management involves setting up users and their roles in Timogen Adaptive Controller. A user belongs to at least one role. A role is a set of privileges. These privileges comprise of a set of permissions on a Node Group.

This chapter covers the following topics:

- "About Users" on page 151
- "Creating Users" on page 153
- "About Functions" on page 153

Users and roles must be defined by the **Technical Admin** user.

About Users

A user is anyone who can sign on to the system. Users have certain functions and privileges and must be part of a function to inherit any privileges. As part of the seed data, the following three default user functions are created:

- Business User
- Business Admin
- Technical Admin

A user must have one or more of the above functions.

Viewing User Lists

To view the user list

1. In the **Function** drop-down list, select **Technical Admin**.
2. Click the **Access Manager** tab, then click **Users**. The Users page appears.

   The Users page shows the following basic information about all users::

Field Name	Description
User ID	A unique ID assigned to the user.
User Name	The name of the user
Default Function	This is the default function assigned to the user.

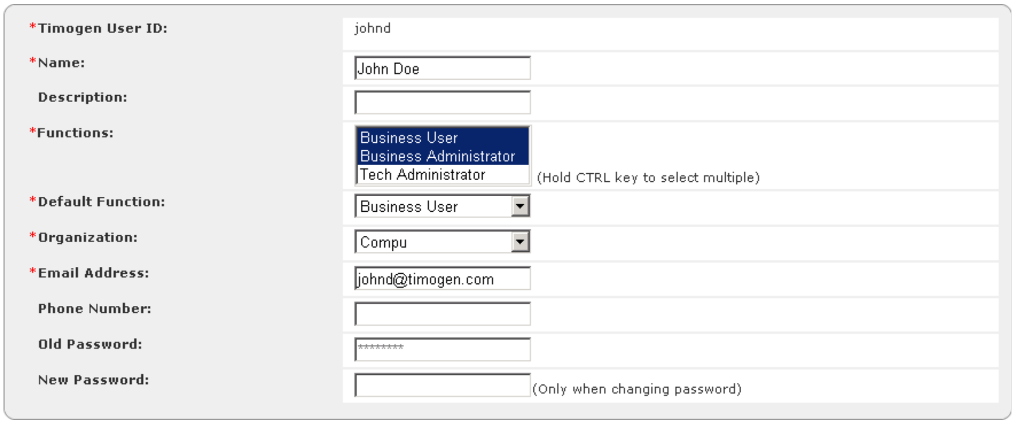
You can:

- Create new users. See "Creating Users" on page 153.

- Modify the details of any user. See “Editing User Details” on page 153.
- Delete one or more users. See “Deleting Users” on page 153.

User Details

Timogen Adaptive Controller uses the details entered about users to control access to the program, send email and other communications, and define workflows.



Use this information about the user detail fields to enter the correct information about users.

Field Name	Description
* Timogen User ID	The unique ID assigned to the user. This field cannot be modified once it is created and saved.
* Name	The first and last name of the user. Enter as First Name <space> Last Name.
Description	A brief description of the user.
* Functions	Defines what function(s) the user is assigned, from: • Business User - Provides basic access for program use. • Business Administrator - Responsible for managing priveleges, defining product groupings, creating problem configuration templates, scheduling inventory reports, and setting up alerts. • Tech Administrator - Responsible for system administration and deployment, not required for day-to-day program use. Users can have more than one function. To assign multiple functions, hold down the CTRL key when you click on the roles.
* Default Function	The default Function for the user, which will be the function entered at login.
* Organization	The organization in your comapny to which the user belongs.
* Email Address	The email address for the user, used when email alert notifications are sent.
* Phone Number	The user’s phone number.

Field Name	Description
Old Password	The user's old password, hidden by asterisks.
New Password	When changing a user's password, enter it here.

* indicates a required field.

Creating Users

Before anyone can use Timogen Adaptive Controller, they must have a user account defined.

To create a user

1. In the **Function** drop-down list, select **Technical Admin**.
2. Click the **Access Manager** tab, then click **Create New User**. The Create New User page appears.
3. Enter the user details. For more information, see "User Details" on page 152.
4. Click **Save**.

Editing User Details

Only users with the Technical Admin function can edit user details.

To edit user details

1. In the **Function** drop-down list, select **Technical Admin**.
2. Click the **Access Manager** tab, then click **Users**. The user list page appears.
3. Click a User ID link. The detail page for that user appears.
4. Make any desired changes to the user details. For more information, see "User Details" on page 152.
5. Click **Save**.

Deleting Users

Only users with the Technical Admin function can delete users.

To delete a user

1. In the **Function** drop-down list, select **Technical Admin**.
2. Click the **Access Manager** tab, then click **Users**. The user list page appears.
3. Select the check box(es) for the user(s) you want to delete.
4. Click **Delete**.

About Functions

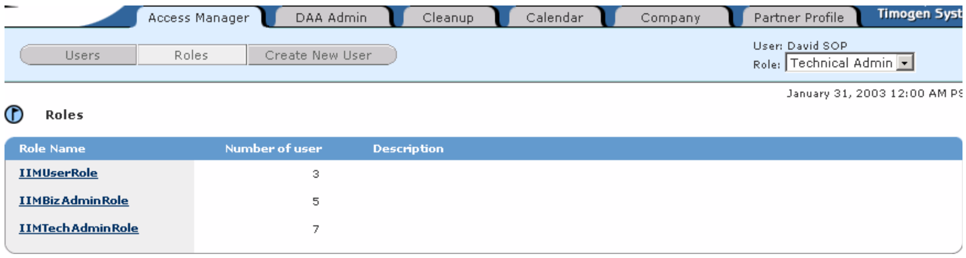
Users must be assigned at least one function before they can use Timogen Adaptive Controller. You can assign functions on a user-by-user basis on the user details page (see "User Details" on page 152) or you can assign several users at once to a function in the Functions section.

Viewing Function Lists

To view the function list

1 In the **Function** drop-down list, select **Technical Admin**.

2 Click the **Access Manager** tab, then click **Functions**. The Functions page appears.



The function list page shows the name of each function, how many users are assinged to each function, and an optional description for each function.

Assigning Functions to Users

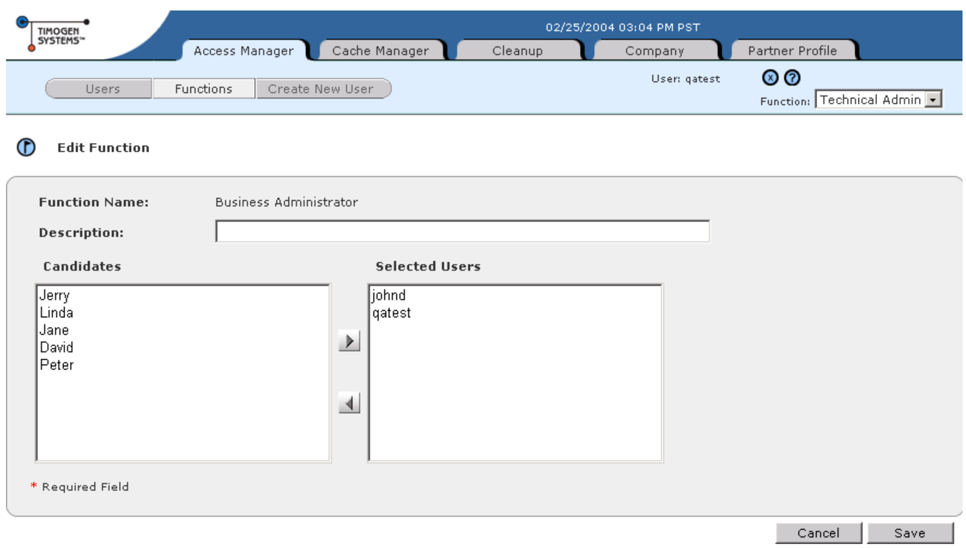
You can assign one or more functions to a single user on the user details page. In the Functions section, you can assign a function to multiple users.

To assign a function to users

1 In the **Function** drop-down list, select **Technical Admin**.

2 Click the **Access Manager** tab, then click **Functions**. The role list page appears.

3 Click a Function Name link. The Edit Function page appears.



4 In the All Users list, select one or more users. Hold down the CTRL key when clicking to select multiple users.

5 Click . The users are moved to the Selected Users list.

6 Click **Save**.

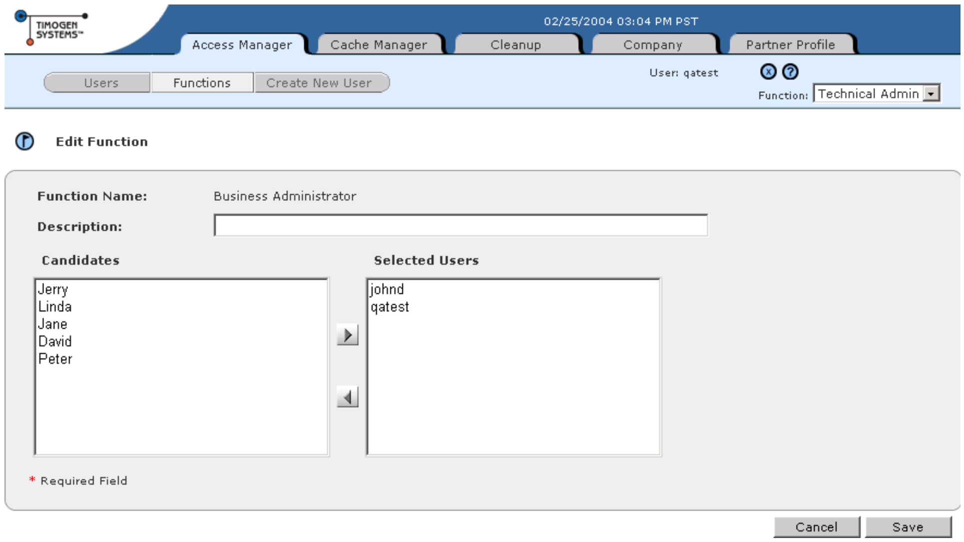
Removing Functions From Users

To remove a function from a user

1 In the **Function** drop-down list, select **Technical Admin**.

2 Click the **Access Manager** tab, then click **Functions**. The function list page appears.

3 Click a Function Name link. The Edit Function page appears.



4 In the Selected Users list, select one or more users. Hold down the CTRL key when clicking to select multiple users.

5 Click ◄. The users are moved to the All Users list.

6 Click **Save**.

15

Scheduled Cleanup

Inventory data that is no longer required can be deleted from the database. Such pruning keeps the database free from clutter and faster to respond. The Technical Admin user can schedule and delete data at specific intervals.

Note: Scheduled cleanup should be used infrequently and with extreme caution. The administrator needs to fully understand the consequences of the cleanup. A restore option can be provided as a last resort but there is no guarantee that the data can be restored back to its original state.

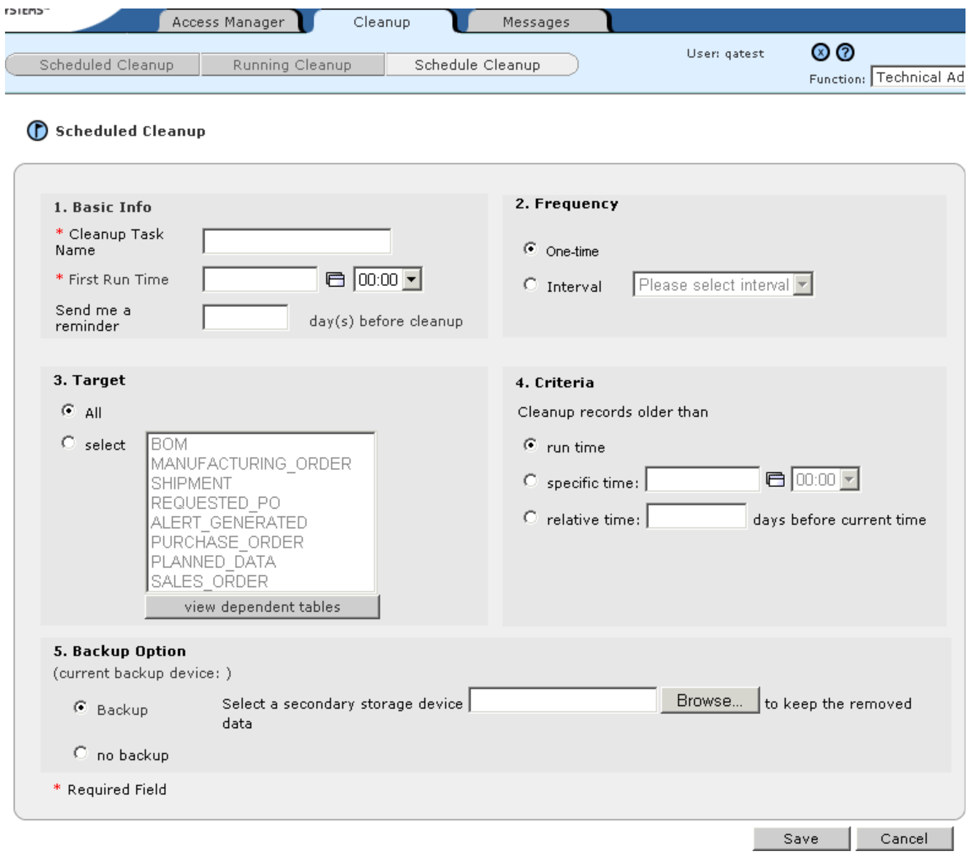
Scheduling Cleanups

You can set up and schedule periodic data cleanup activities.

Only users with the Technical Admin function can schedule cleanups.

To schedule a cleanup

1. In the Function drop-down list, select Technical Admin.
2. Click the **Cleanup** tab, then click **Schedule Cleanup**. The Schedule Cleanup page appears.



3. Enter the cleanup configuration details.

Section Name	Description
Basic Info	• * Cleanup Task Name - Enter a unique and descriptive name for the cleanup task. • * First Run Time - Enter a date (or click to select a date) and select a time for the first run of the cleanup. • Send me a reminder - Optionally enter a number of days prior to the scheduled cleanup to be sent a reminder.
Frequency	How often the cleanup will be run. Select either **One Time** or **Interval**. If *Interval*, select daily, weekly, monthly, quarterly, or yearly.
Target	The type of data to be deleted. Select either **All** or **select**. If *select*, select one or more data types from the list (hold down the Ctrl key while clicking to select more than one).

Section Name	Description
Criteria	Defines the age of records (of the type defined in the Target section) to be deleted: • run time - Every record older than the time of the cleanup. • specific time - Every record older than the entered date (or click 🗔 to select a date) and selected time. • relative time - Every record older that the entered number of days prior to the time of the cleanup.
Backup Options	Defines whether the deleted data will be backed up. • Backup - Click Browse to select a drive and folder to store the backup files. The backup will overwrite the contents of any existing file of the same name. • no backup - The date is deleted and cannot be retrieved.

* indicates a required field.

4 Click **Save**.

5 In the confirmation dialog box, click **OK**.

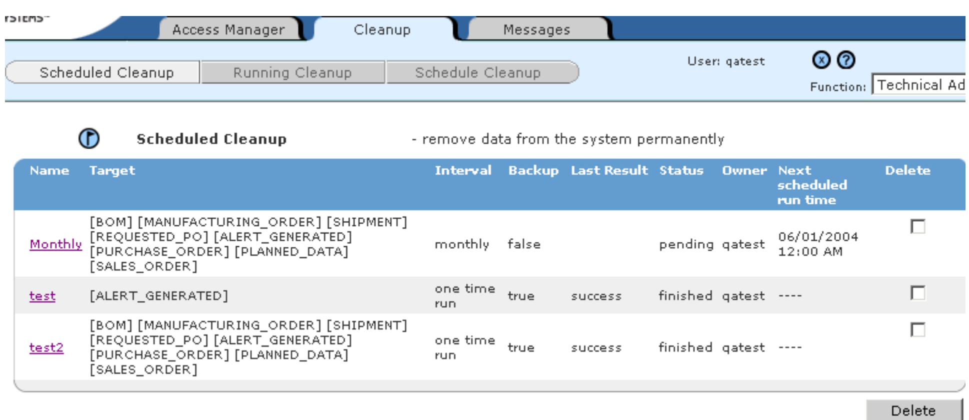
Editing Scheduled Cleanups

Only users with the Technical Admin function can edit a scheduled cleanup task.

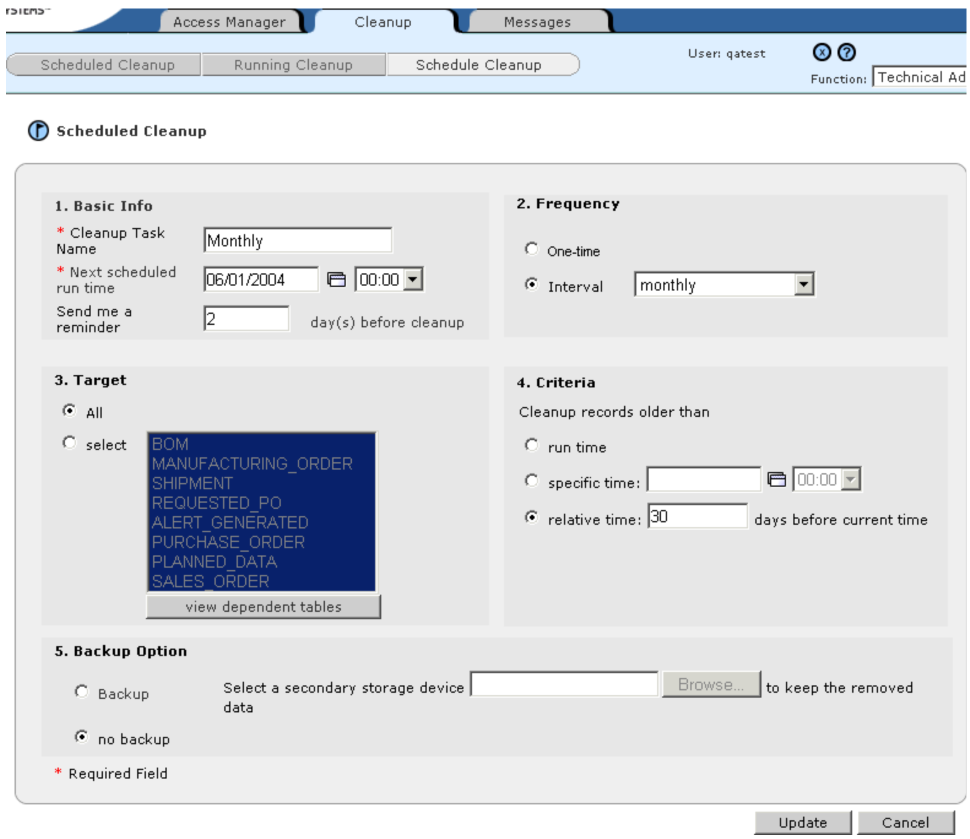
To edit a scheduled cleanup task

1 In the Function drop-down list, select **Technical Admin**.

2 Click the **Cleanup** tab, then click **Scheduled Cleanup**. The Scheduled Cleanup page appears.



3 Click the name of a scheduled cleanup task. The Schedule Cleanup page appears.



4 Make any desired changes to the scheduled cleanup task configuration details.

Section Name	Description
Basic Info	• * Cleanup Task Name - Enter a unique and descriptive name for the cleanup task. • * First Run Time - Enter a date (or click 🗔 to select a date) and select a time for the first run of the cleanup. • Send me a reminder - Optionally enter a number of days prior to the scheduled cleanup to be sent a reminder.
Frequency	How often the cleanup will be run. Select either **One Time** or **Interval**. If *Interval*, select daily, weekly, monthly, quarterly, or yearly.
Target	The type of data to be deleted. Select either **All** or **select**. If *select*, select one or more data types from the list (hold down the Ctrl key while clicking to select more than one).

Section Name	Description
Criteria	Defines the age of records (of the type defined in the Target section) to be deleted: • run time - Every record older than the time of the cleanup. • specific time - Every record older than the entered date (or click to select a date) and selected time. • relative time - Every record older that the entered number of days prior to the time of the cleanup.
Backup Options	Defines whether the deleted data will be backed up. • Backup - Click Browse to select a drive and folder to store the backup files. The backup will overwrite the contents of any existing file of the same name. • no backup - The date is deleted and cannot be retrieved.

* indicates a required field.

5 Click **Update**.

6 In the confirmation dialog box, click **OK**.

Stopping Scheduled Cleanups

You can stop any scheduled cleanup task any time it is running.

Only users with the Technical Admin function can stop a scheduled cleanup task.

To stop a scheduled cleanup task

1 In the Function drop-down list, select **Technical Admin**.

2 Click the **Cleanup** tab, then click **Running Cleanup**. The Running Cleanup page appears. If any cleanup tasks are running, they will be listed on this page.

3 Click the **Abort** check box for the cleanup task your want to stop[.

4 Click **Abort**.

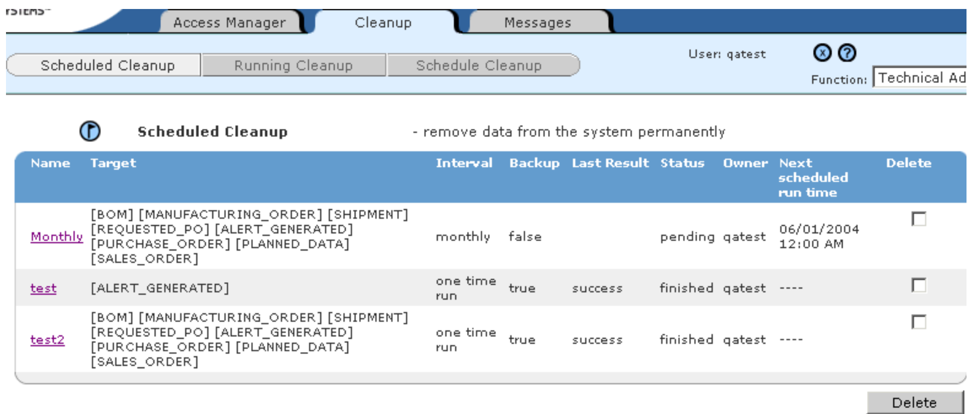
5 In the confirmation dialog box, click **OK**.

Deleting Scheduled Cleanups

Only users with the Technical Admin function can delete a scheduled cleanup task.

To stop a scheduled cleanup task

1. In the Function drop-down list, select **Technical Admin**.
2. Click the **Cleanup** tab, then click **Scheduled Cleanup**. The Scheduled Cleanup page appears.



3. Click the **Delete** check box for the cleanup task your want to stop[.
4. Click **Delete**.
5. In the confirmation dialog box, click **OK**.

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Messages

The Messages page lists any messages that have been generated from the interaction between Timogen Adaptive Controller and other ERP systems. The list shows the text of the message, its type, its source, and the time it was created.

Deleting Messages

You can delete messages that you no longer need.

Only users with the Technical Admin function can delete messages.

To delete a message

1. In the Function drop-down list, select **Technical Admin**.
2. Click the **Messages** tab. The Messages page appears.
3. Select the check box for the message that you want to delete.
4. Click **Delete**.
5. In the confirmation dialog box, click **OK**.

A

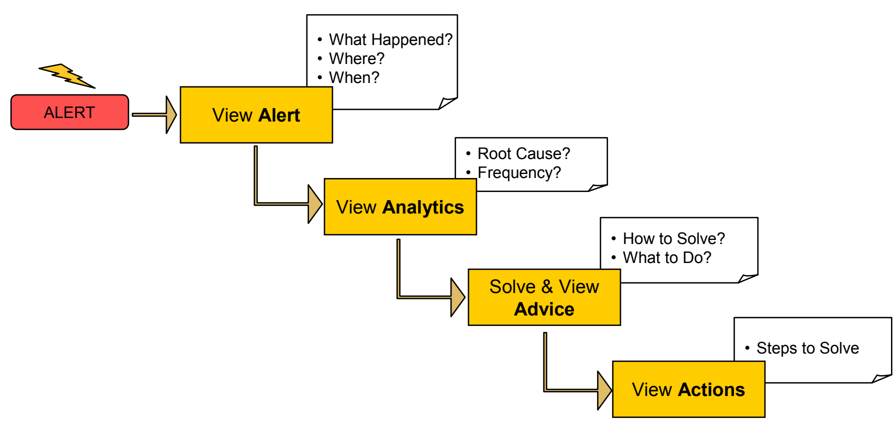
Appendix A Business Process Maps

This appendix contains process map diagrams that describe various Business User workflows. The following business process maps have been included:

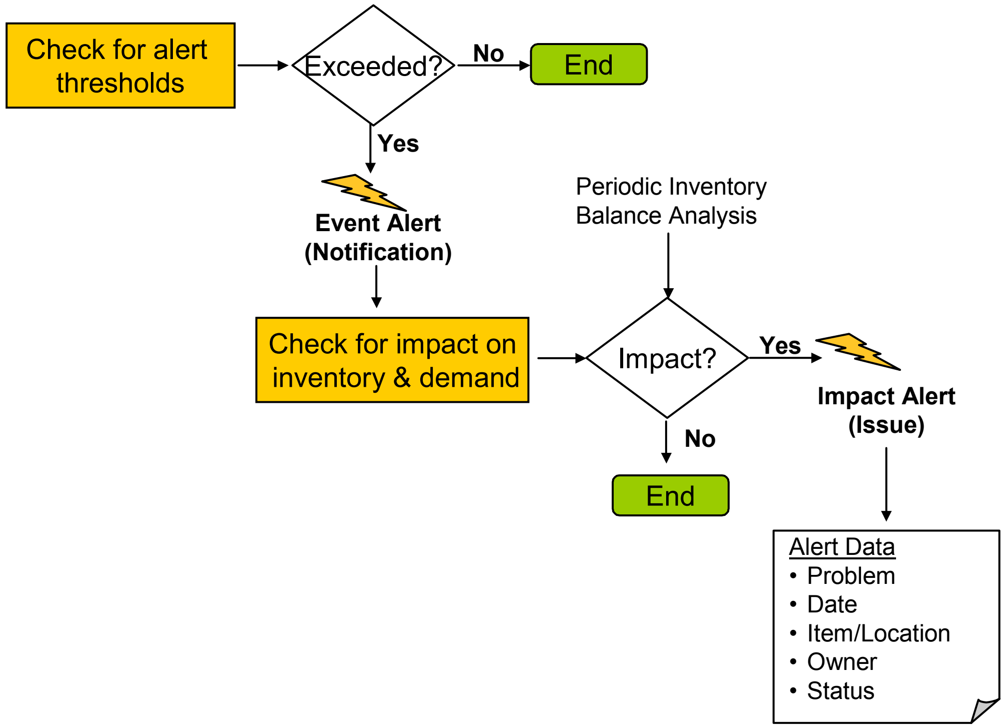
- "Resolution Process" on page 165
- "Alert Creation" on page 166
- "Analytics Process" on page 166
- "Advice Generation" on page 167
- "Resolution Execution" on page 167

The Resolution Process map shows the overall flow, while the rest of the maps show more detail of each step.

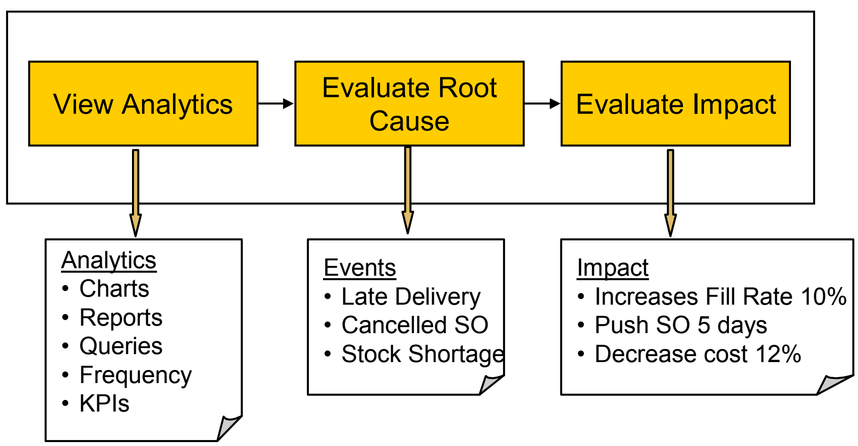
Resolution Process



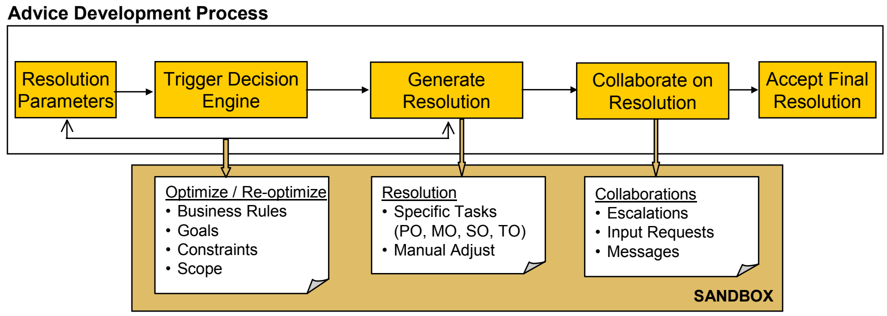
Alert Creation



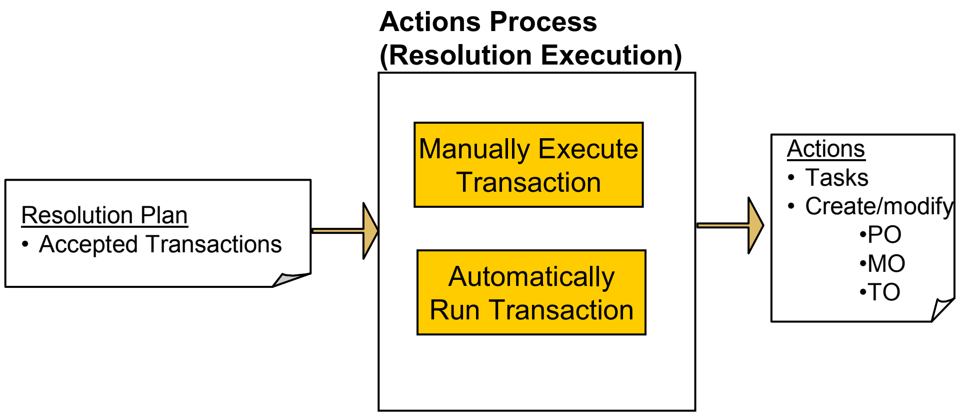
Analytics Process



Advice Generation



Resolution Execution



Glossary

Alert	An alert is a notification to a particular user or users that a supply chain anomaly has occurred. Alerts are sent to Users who have subscribed to alerts and to Users who are primary resolvers for issues pertaining to that product
Alert Category	The Alert Category determines the conditions under which an Alert should be posted.
Alert Definition	When the Technical Admin user sets up the information that will trigger an Alert, they are creating the Alert Definition. The Alert Definition contains the attributes that define when and how an Alert is triggered. Alert Definitions are defined by the Item or Item Group ID, the Alert Category, and the assigned Location set.
Buckets	Buckets are data units that contain time based information.
Business Admin	The Business Admin users have planning and materials management expertise sufficient to determine the information and trigger point data that control event response.
Business User	The Business Users are responsible for reviewing and resolving supply chain issues. They also have the long-term responsibility for supply chain maintenance and improvement.
Escalation Roles	The User Roles to which an alert can be escalated.
Event Alerts	Alerts that react to external events are called Event Alerts.
Impact Alerts	An Impact Alert indicates a shortage and/or overstock on an Impact Node.
Impact Nodes	Impact node refers to one location and item combination.
Item	The unique identifier assigned to a tracked part, product, assembly, or group within the Timogen Adaptive Controller when the administrator enters the item into the system. This is typically the part number used to identify the part.
Item Groups	To be inserted

Item Mapping	The mappings between the ERP IDs and the Timogen Adaptive Controller IDs.
Node Group	A Node Group is a set of Items and Locations.
Nodes	To be inserted
Permission	<Each action - object combination represents a permission.**To be checked.**>
Privilege	A Privilege is a set of Permissions on a Node Group (set of nodes).
Product Mapping	The mappings between the Sales Order Product IDs and the Timogen Adaptive Controller IDs.
Reconciliatio n	To be inserted
Resolution	When an Alert is generated, it is sent to Users who have been assigned as Primary and/or Secondary Resolvers for that Alert. The Resolvers then select from and begin a series of actions designed to resolve the cause of the Alert. These actions comprise the Resolution for the Alert.
Resolution Plan	A Resolution Plan is a set of tasks where each task can be executed manually or automatically.
Resolution Template	A Resolution Template contains a set of actions that can be used to resolve an Impact / Event Alert.
Resolver	Resolvers are Users assigned to a product/item/part number and designated the primary or secondary resolver for alerts issued for that product. Resolvers are expected to review the issue and to begin a resolution process, reassign the resolution to another user, or forward the issue for consultation (i.e., with a Materials or other manager).
Role	A Role represents a set of Privileges and a set of Users. When a User is assigned to a Role, it confers certain privileges within the system. The Technical Admin user can create or delete Users and edit their Role and Password information.
Running Cleanup	This option is used to run the scheduled cleanup tasks that have been defined.
Sandbox	Sandbox is a feature that allows users to scope problems and seek scoped resolutions for impact alerts.
Scheduled Cleanup	The Scheduled Cleanup option allows you to schedule and delete data at specific intervals.

Scoping The scoping process establishes a group of impact nodes and how the relationship between them should be considered for solving one problem.

Supply Demand View The Supply Demand View provides a projected view of inventory levels for the set of impact nodes (specified in the problem scope) charted over time.

Task To be inserted

Technical Admin The Technical Admin users deal with the technical aspects of system configuration and deployment.

Threshold When Business Admin users set up Alert Definitions, they can set threshold values at which High, Medium, or Low severity Alerts will be triggered. Threshold values may take the form of absolute numeric entries, percentages, or time values depending upon the structure and requirement of the Alert.

Users A User is an entity who can sign on to the system using a username, password and has certain Roles and Privileges.

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Abbreviations	Acronyms
BOM	Bill of Material
CMPO	To be inserted
CSR	Customer Sales Rep
CSV	Comma Separated Values
ERP	Enterprise Resource Planning
LIBA	Local Impact Node Balancing Algorithm
MNV	Material Network View
MO	Manual Order
PO	Purchase Order
SDV	Supply Demand View
SO	Sales Order
SOAP	Simple Object Access Protocol
UDDI	Universal Description Discovery and Integration Standard
WSDL	Web Service Definition Language

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W