Course 80423A:

Master Planning in Microsoft Dynamics AX 2012

Length: 2 Days

Date: Sep 25 – 26

Time: 8:30AM – 5:00PM

Technology: Microsoft Dynamics AX 2012

Fee: CA$ 550.00 per day per person

Hardware: Attendees are required to provide their own PC-based laptop for the purpose of completing in-class labs.

Delivery Method: Instructor-led (classroom)

*Multi-enrolment discounts are available for multiple registrations from the same company.

About this Course
This two-day instructor-led course provides students with the necessary tools and resources to perform moderate to advanced tasks for the setup and process of forecast and master planning in Microsoft Dynamics AX 2012.

Topics include the main concepts, considerations and setups used in master planning, master scheduling, forecast scheduling, coverage groups, product item detailed coverage settings, and the effect that intercompany and multisite operations has on the Master planning module.

Course Outline

Module 1: Master Planning Overview
This module provides a high level summary of the main elements of master planning. It contains conceptual information on the differences between master scheduling and forecast scheduling and the regenerative and net change master scheduling processes. It also includes a list of reports that are useful and how the module could be integrated with other modules in an example workflow.
Module topics to include
- Master Planning Overview
- Master Scheduling, Forecast Scheduling, and Intercompany Master Scheduling
- Master Planning on Multiple Sites
- Example of a Master Planning Business Process Flow

Module 2: Planning Considerations and Setup
This module outlines some main considerations for setting up and using the Master planning module. This includes prerequisite setups in master planning and other modules in Microsoft Dynamics AX 2012.

Conceptual ideas are reviewed such as the one and two plan strategies, operations and job scheduling considerations, and master scheduling execution principles.

Parameters in two important forms in the Master planning module are covered in detail: the Master plan form and the Master planning parameters form. Finally, the module provides an overview of how to handle the main master scheduling results in the Planned order form.

Module topics to include
- Overview of Plan Input and Output
- Preliminary Considerations
- Understanding the Overall Setup Process in Master Planning
- Master Planning Parameters Form
- Master Plans Form
- Operations and Job Scheduling
- Static and Dynamic Master Plans
- Master Scheduling Principles
- Master Scheduling Results

Module 3: Coverage Groups
This module discusses coverage planning generally and coverage groups specifically. It includes the specific principles and parameters that guide how master planning handles each item or group of items in inventory when a master schedule is run.

It also contains a detailed overview of how groups of items are handled through the definition of parameters in the coverage groups form in the Master planning module. It also includes a detailed review of coverage code principles, negative and positive days, firming and planned order explosion fields, action messages, futures messages.

Module topics to include
- Coverage Groups and Parameters
- Creating Coverage Groups
- Coverage Periods
Module 4: Coverage Settings
This module explains the possibilities in setting up detailed coverage information on single items that do not fit simple group settings. It provides an overview of how to define settings in the Items coverage form, the Item details form and the Item coverage setup form. It also includes a brief review of the minimum/maximum key, warehouse and safety stock as these functions apply to coverage settings.

Module topics to include
- Introduction to Detailed Coverage Settings
- Coverage Settings Precedence
- Detailed Coverage Overview
- Item Coverage
- Minimum/Maximum Keys
- Item Coverage Setup
- Warehouses Form
- Safety Stock Journal

Module 5: Forecast Plans
This module provides an overview of the main forms involved in defining a forecast plan including forecast models, forecast plans, forecast items and creating a sales forecast in the sales forecast form. It also includes a discussion of item allocation keys, period allocation categories and reduction keys that let you automatically create item configurations.

Module 6: Intercompany Master Planning
This module provides a brief overview of how master scheduling is conducted when companies are running Intercompany. In Intercompany master planning this includes setting up master planning parameters, understanding scheduling sequences, iterations and a review of the scheduling methods, and a brief example of intercompany company relationships. In multisite configuration considerations, this lesson provides an overview of dimensions setup, key elements in the functionality that apply to master planning, and examples of how planning is conducted across sites.

Module topics to include
- Intercompany Overview
- Intercompany Planning Groups
- Intercompany Master Scheduling Form
- Master Planning and Multisite Considerations