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Resource Planning Data
About this document

Read this document to get an overview of the Resource Planning Data (RPD) module’s functionality and to learn more about the functional procedures that are related to RPD.

You need no detailed knowledge of the BaanERP software to read this document. However, you are more likely to understand the contents if you are familiar with:

- The overall structure of packages, modules, and sessions in the BaanERP software
- The general business procedures used in everyday business practice
- The basic concepts of enterprise resource planning

For detailed descriptions of the module’s sessions, refer to BaanERP’s comprehensive online Help.

To use this document

Read Chapter 1, The Resource Planning Data (RPD) module in BaanERP, if you want to know more about:

- The function of RPD in BaanERP
- The relationship of the module with other modules
- The module’s functional procedures
- The master data that you can maintain in RPD

Read Chapter 2, To configure and initialize Baan Enterprise Planning, if you want to know more about the actions that must be carried out before you can use Baan Enterprise Planning.

Read Chapter 3, To maintain master data, if you want to know about the way you can maintain the master data for Baan Enterprise Planning.

Read Chapter 4, To initialize, roll, and update scenarios, if you want to know more about the procedure that you must perform in certain situations, in order to keep the scenarios ready for use.
**Acronyms used in this document**

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<tr>
<td>BCM</td>
<td>Bill of Critical Material</td>
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<tr>
<td>BOM</td>
<td>Bill of Material</td>
</tr>
<tr>
<td>BRG</td>
<td>Enterprise Modeler</td>
</tr>
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<td>CCP</td>
<td>Central Calendar Management</td>
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<td>CLP</td>
<td>Cyclic Planning</td>
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<td>CTP</td>
<td>Capable to Promise</td>
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<td>DRP</td>
<td>Distribution Requirements Planning</td>
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<td>DSP</td>
<td>Demand and Sales Planning</td>
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<td>IBD</td>
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<td>IPD</td>
<td>Item Production Data</td>
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<td>PAT</td>
<td>Plan Aggregation and Transfer</td>
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<td>PUR</td>
<td>Purchase Control</td>
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<td>RAO</td>
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<td>Sales Control</td>
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**Legend**

- **Mandatory session**
  - Indicates a mandatory session

- **Optional session**
  - Indicates an optional session

- **Mandatory business object**
  - Indicates a mandatory business object

- **Optional business object**
  - Indicates an optional business object

- **CF**
  - Indicates a package

- **PCS**
  - Indicates a module

- **PCS**
  - Indicates a module that is described in the module procedure
1. The Resource Planning Data (RPD) module in BaanERP

This chapter provides information about:

- The function of RPD in BaanERP
- RPD’s functional procedures
- The modules that are related to RPD
- The master data that is defined in RPD

1.1 The function of RPD in BaanERP

Baan Enterprise Planning offers you flexibility in the planning strategies that you can apply. You can simulate a number of scenarios and experiment with variables such as:

- Production capacity
- Resource calendar
- Supplying relationships
- Sourcing strategies

You can define these scenarios and most of the planning parameters in the RPD module.

You can also use the RPD module to initialize master plans.

Figure 1 shows how the RPD module is positioned in BaanERP.

![Figure 1. The RPD module in BaanERP](image)

RPD is a basic data module in which, you maintain the general parameters and the state-independent planning data for Baan Enterprise Planning package.
1.2 The modules that are related to RPD

Figure 2 shows the modules that are related to RPD.

Required data

The RPD module uses data from several other modules:

- The items that are defined in the Item Base Data (IBD) module form the basis of the plan items in RPD.

- You can link a calendar from the Central Calendar Management (CCP) module to a resource. You can also copy a calendar from CCP to a planning calendar.

- The Enterprise Modeling Management (EMM) module provides the clusters of warehouses that you use to define supplying relationships. Use the companies that are defined in EMM to define the plan sites of a multisite scenario and the supplying relationships.

- In the Enterprise Modeler (BRG) module you define enterprise units. If a logistic company does not use one standard calendar, but several calendars, you can divide the company into enterprise units, and link a different calendar to each enterprise unit.

- The work centers that are defined in the Routing (ROU) module serve as the resources in Baan Enterprise Planning. You also define the bills of critical capacities in ROU.

- In the Bill of Material (BOM) module you define bills of material, bills of critical material, and the aggregation relationships on which Baan Enterprise Planning bases its planning calculations.
**Application of the data**

The basic data that you define in the RPD module influences the planning process in the following modules:

- The Resource Master Planning (RMP) module
- The Demand and Sales Data (DSP) module
- The Workload Control (WLC) module
- The Resource Requirements Planning (RRP) module
- The Cyclic Planning (CLP) module

Read the following documents to learn more about these planning modules:

- *Master-Based Planning (RMP/DSP/WLC) (UP012A US)*
- *Order-Based Planning (RRP/CLP) (UP014A US)*

The RPD module is also related to the following modules:

- The Resource Analysis and Optimization (RAO) module displays the signals that are generated in the Initialize, Roll and Update Scenario (cprpd4200m000) session.
- The Plan Aggregation and Transfer (PAT) module aggregates or disaggregates master-plan data. This (dis)aggregation process is influenced by the plan-item data that is defined in RPD.

**1.3 RPD’s functional procedures**

In this document, the following functional procedures are distinguished:

- To configure and initialize Baan Enterprise Planning
- To maintain master data
- To initialize, roll, and update scenarios

**To configure and initialize**

Before you can plan in Baan Enterprise Planning, you must follow a procedure to install and configure the package and to initialize its parameters. An administrator usually performs these tasks.

The procedure consists of only two sessions:

- EP Parameters (cprpd0100s000)
- Performance Parameters (cpcom0100s000)

**To maintain master data**

The primary purpose of RPD is to set up and maintain the master data for Baan Enterprise Planning, and to model the supply-chain structure. The main elements of the master data are briefly introduced in the next section.

**To initialize, roll, and update scenarios**

Before you can work with an item’s master plan, you must initialize the scenario for that item. You must repeat this action in certain cases, for example, if the plan-period definition has changed. In the case of a rolling plan, you can use the same procedure to roll the scenario forward in time.
1.4 Overview of the master data

You can maintain the following master data in this module:

- Scenarios
- Plan units
- Plan items
- Resources
- Supply-chain data
- Classes

Scenarios

A scenario identifies a set of master plans and planned orders for plan items. Use various scenarios to test and compare alternative planning solutions, to find the best set of parameters for items and resources. For example, you can vary demand forecasts, add resources, or change priority settings.

Only one of the scenarios is the actual scenario. The following types of interaction between Baan Enterprise Planning and the other packages in BaanERP are based on (or are applied to) the actual scenario:

- Transfer of production plans and planned orders to the execution level of BaanERP
- ATP/CTP checks at the execution level
- Online master plan updates from the execution level

Plan units

A plan unit groups a set of plan items that share the production capacity of certain resources. Plan units are only used for workload control (a master-based planning method that takes material and/or capacity constraints into account).

A plan unit often corresponds to a production department. Usually, no more than three to five plan units are distinguished in a production system.

Plan items

A plan item is an item with a Planned order system. These items are first defined in the Item Base Data (IBD) module. You can maintain planning-related data for these items in the RPD module.

A plan item can also be a product family. A product family is a group of similar plan items which are aggregated to give a more general plan than the one devised for individual items.
Resources

A resource is a source of production capacity. For example, a resource can be a group of machines or employees that work together as a unit.

A resource in Baan Enterprise Planning is a work center in Baan Manufacturing. An operation performed to manufacture an item requires a certain amount of capacity from a resource (for example, production hours). The capacity of the resource can be a constraint in the planning.

You can specify the availability of a resource by defining the resource calendar.

Supply chain data

Material requirements can be covered by three types of orders:

- Production orders
- Purchase orders
- Distribution orders

Distribution orders model the planned movement of goods between warehouse locations. Distribution orders are especially suitable for multisite situations.

By means of sourcing strategies, allocation rules, and supplying relationships you can control:

- The choice between production orders, distribution orders, and purchase orders
- The selection of suppliers

Classes

Classes are used to group items according to one or more features.

A class is a feature or a group of features. For example, if the color of items is an important feature when you plan a certain resource, you can define color as a class.

Classes are used to easily define cycle constraints, which are used in cyclic planning. For more information on cyclic planning, see the Order-Based Planning (RRP/CLP) (UP014A US) module procedure.
2. To configure and initialize Baan Enterprise Planning

Before you can use Baan Enterprise Planning, an administrator must carry out the following actions:

- Define the item segmentation
- Initialize parameters
- Set the performance parameters

Figure 3 shows the steps in the procedure.

![Diagram](image)

**Figure 3, To configure and initialize Baan Enterprise Planning**

The procedure consists of the following steps:

**Step 1 Define the item segmentation**

Use the Segmented Domains (ttgfd4122m000) session to define the item segmentation. This must be performed by an administrator. Once defined, the item segmentation cannot easily be changed.

**Step 2 Define the actual scenario**

Define a scenario in the Scenarios (cprpd4500m000) session, which can be used as the actual scenario.

**Step 3 EP Parameters (cprpd0100s000)**

Use the EP Parameters (cprpd0100s000) session to specify the parameters for Baan Enterprise Planning. The first time that you use this session, BaanERP sets the parameters to their default values.

In this session, you also specify the actual scenario.

**Step 4 Performance Parameters (cpc0m0100s000)**

Use the Performance Parameters (cpc0m0100s000) session to set a number of parameters that influence system performance.
To configure and initialize Baan Enterprise Planning
3. To maintain master data

This chapter outlines how you can use RPD:

- To define scenarios
- To set up plan periods
- To define plan units
- To define plan items
- To define resources
- To work with calendars
- To define supply-chain data

**Note**

You can carry out most of these activities in any order: there is no mandatory sequence of steps.

### 3.1 To define scenarios

Use the Scenarios (cprpd4500m000) session to define scenarios. A scenario represents one possible planning situation; you can define various scenarios, and use these to compare alternative planning solutions. The following types of data are scenario-dependent:

- Simulation parameters
- Planning calendars
- Simulation results, for example
  - Master plans and planned orders
  - Capacity requirements
  - Material requirements
  - Utilization of resources

If you select the **Rolling Plan** check box, the planning horizon and plan period division is regularly shifted forward in time, according to the rolling frequency that you define.

**Multisite scenarios**

A scenario can also be a multisite scenario. A multisite scenario coordinates a number of local scenarios.

Define the local sites that belong to a multisite scenario in the Plan Sites (cprpd4140m000) session.

### 3.2 To set up plan periods

Use the Plan Periods (cprpd4120m000) session to divide the total planning horizon into a number of plan periods. These plan periods are the time buckets of the item master-plans, channel master-plans, and resource master-plans. Plan periods can have unequal lengths.

**Important**

Every scenario must have plan periods, even if you do not use master-based planning.

Changes in the plan-period definition take effect after you update the scenarios by using the Initialize, Roll and Update Scenario (cprpd4200m000) session.
3.3 To define plan units

The plan unit groups plan items that must be planned together. You can use plan units to manage the complexity of the planning process.

You need to define plan units for workload control only (a master-based production planning method that takes material and/or capacity constraints into account). In order-based planning, BaanERP ignores the plan units.

**Prerequisites**

Before you define plan units, you must identify which plan items need to be planned together (because they use the same critical materials and/or critical resource capacity).

A number of restrictions apply to the definition of plan units. These restrictions are explained in the online Help.

Figure 4 shows the steps in the plan-unit definition procedure.

![Figure 4, To define plan units](image)

The procedure consists of the following steps:

**Step 1 Plan Units (cprpd6500m000)**

Define the plan units in the Plan Units (cprpd6500m000) session.

Select the planning engine for the plan unit on the basis of the characteristics of the plan items and the resources that they use in the plan unit. This planning engine is used for master-based planning.

**Step 2 Assign plan items to plan units**

Assign plan items to plan units by entering the plan units in the Master Plan Unit field in the Plan Items (cprpd1101s000) session.

**Step 3 Recompute Phase Numbers (cprpd6200m000)**

The phase number of a plan unit specifies the order in which BaanERP plans plan units and items. In general, the production of a manufactured item is planned before its materials are planned.
You must also recompute the phase numbers after a change in the bill of critical material (BCM). If the Online Phase Number Update check box in the EP Parameters (cprpd0100s000) session has is, BaanERP updates the phase numbers automatically whenever the BOM or the BCM changes.

3.4 To define plan items

To prepare an item for the planning process, you must carry out the procedure outlined in figure 5.

1. **General Item Data (tcibd0501m000)**
   Define the item in the General Item Data (tcibd0501m000) session. The item type is usually either Manufactured or Purchased. (However, Baan Enterprise Planning does not use this information).

2. **Item Ordering Data (tcibd2500m000)**
   Set the order system of the item to Planned in the Item Ordering Data (tcibd2500m000) session.

3. **Plan Item Data (cprpd1500m000)**
   Use the Plan Item Data (cprpd1500m000) session to specify how the plan item must be planned. Various types of parameters are involved; the most important of these parameters are explained below.

**Default data**
If you must enter a large number of items, rather specify default planning data in the Plan Item Data Defaults (cprpd1510m000) session. You must specify the default data by item group and item type. If you define an item with Planned order system in the IBD module, BaanERP automatically fills in the plan-item data, based on the defaults.

**Cluster segment**
The item code of plan items starts with a cluster segment. If a code has been entered in the cluster segment, the item is a clustered item. The clustered item represents a plan item in a distribution warehouse (nonnettable warehouse). You can use clustered items to model distribution planning.
For more information, see section 3.7, To define supply-chain data, and section 3.8, To set up distribution requirements planning (DRP).

The most important data that you define in the Plan Item Data (cprpd1500m000) session is:

- Plan level
- Plan item type
- Default warehouse
- Default supply-source
- Planning horizon
- Order horizon
- Maintain master plan

**Plan level**

The plan level is a level within a hierarchical planning structure. If you plan on a higher plan level, plans are general and less detailed. Figure 6 shows an example of a structure of plan levels.

![Diagram of plan levels](image)

**Plan level 1**

- **Bicycle**

**Plan level 2**

- **Mountain bike**
- **Racing bike**

**Plan level 3**

- **Model M-1**
- **Model M-2**
- **Model R-1**
- **Model R-2**

*Figure 6, Example of product families and plan levels*

Plan level 1 is the highest plan level; the higher the number, the lower the plan level.

**Product families**

You can group plan items into product families.

In the example in figure 6, the bicycle item is a product family. This product family is an aggregation of the mountain bike item and the racing bike item. The mountain bike and the racing bike are also product families.

If you have 10 customer orders for each model (M-1, M-2, R-1, and R-2), BaanERP can aggregate these orders to 40 customer orders for the bicycle item.
To define a product family, carry out the procedure outlined in figure 7.

The procedure consists of the following steps:

**Step 1 General Item Data (tcibd0501m000)**
You must define a product family as an item in the General Item Data (tcibd0501m000) session.

**Step 2 Plan Item Data (cprpd1500m000)**
Set the Plan Item Type field in the Plan Item Data (cprpd1500m000) session to Family.

**Step 3 Aggregation Relationships (tibom2510m000)**
Define the aggregation relationships between product families and their constituents (subitems) by using the Aggregation Relationships (tibom2510m000) session.

A product family has practically the same functionality as other plan items. You can generate planned production orders for families just as you would do for other items. However, normally you do not define BOMs and routings for product families.

By generating planned production orders for families, you can carry out the planning and reserve resources. At the very last moment, you can decide which of the subitems you will actually produce.

**Default warehouse**
The default warehouse is the warehouse from and to which the item is normally delivered.

**Default supply source**
The default supply source is either Production, Purchase, or Distribution. This does not necessarily correspond with the item type (Manufactured or Purchased).

You can overrule the default supply source by defining a sourcing strategy for the plan item.
The planning horizon is the number of days for which Baan Enterprise Planning maintains planning data. Beyond this horizon, Baan Enterprise Planning maintains no planning data and plans no supply. You must make the planning horizon no longer than necessary. Short planning horizons improve system performance.

The order horizon is a very important parameter. Together with the planning horizon, it determines which method is used for supply planning in a particular plan period.

The use of the order horizon and the planning horizon is illustrated in figure 8.

Within the order horizon, supply is planned through planned orders (order-based supply planning). Beyond the order horizon, supply is planned through a supply plan (master-based supply planning).

Instead of combining both supply-planning methods, you can also choose between them:

- If you set the order horizon to zero, BaanERP plans all supply through master-based supply planning.
- If you make the order horizon equal to the planning horizon, BaanERP plans all supply through order-based supply planning.

For more information on master-based supply planning and order-based supply planning, see the following module procedures:

- Master-Based Planning (RMP/DSP/WLC) (UP012A US)
- Order-Based Planning (RRP/CLP) (UP014A US)

If you select the Maintain Master Plan check box, BaanERP maintains an item master-plan for the item.

If you want to make use of master-based supply planning for an item, you must maintain an item master-plan.
If you only use order-based supply planning for an item, the item master plan is optional. The advantage of maintaining an item master plan is that you have access to the following types of master-plan functionalities over the full planning horizon:

- Demand forecasting (and consumption of forecast by actual demand)
- Forecast-based inventory-planning
- Capable-to-promise (CTP) techniques
- Channel planning

The disadvantage of maintaining an item master-plan is that it has an adverse effect on system performance. Therefore, you must only maintain an item master plan if you need specific master-plan functionality.

If you want to maintain a master plan, you must first initialize it with the Initialize, Roll and Update Scenario (cprpd4200m000) session.

**Capable to promise**

The Plan Item Data (cprpd1500m000) contains a number of fields by which you can control the capable-to-promise (CTP) functionality. You can find details about CTP in the Master-Based Planning (RMP/DSP/WLC) (UP012A US) module procedure, and in the online Help.

### 3.5 To define resources

You can maintain additional planning attributes and features that are related to work centers in Baan Enterprise Planning. In Baan Enterprise Planning, work centers are referred to as resources.

To define resources, use the procedure outlined in figure 9.

![Figure 9, To define resources](image)

The procedure consists of the following steps:

**Step 1 Work Centers (tirou0501m000)**

Define the resources as work center in the Work Centers (tirou0501m000) session in Baan Manufacturing.
Step 2  Load the resources in Baan Enterprise Planning

Load the resources in Baan Enterprise Planning as follows:

1  Start the Resources (cprpd2500m000) session
2  Choose the Load ERP command

Define the parameters for each resource in the Resources (cprpd2500m000) session.

Resource calendar

You can link a planning calendar or a central calendar to the resource. The definition of calendars is explained in the following section.

3.6  To work with calendars

In Baan Enterprise Planning, you can use two types of calendars:

- Planning calendars, defined in the RPD module
- Central calendars, defined in the CCP module

Central calendars are also used at the execution level of BaanERP (for example, in the SFC module). Planning calendars, on the other hand, are especially meant for simulation purposes. For example, you can simulate the consequences of working one hour longer every day, or the consequences of increasing the number of resource units.

The calendars that are used in Baan Enterprise Planning are linked to a resource or to an enterprise unit. To define a company calendar by designate a specific resource as the company-calendar provider, and link a calendar to that resource. (You must not use this resource for production planning.)

Baan Enterprise Planning applies the following rules when you select a calendar:

- To plan at a resource, use the resource calendar.
- To plan at a work center that is not a resource, use the calendar of the enterprise unit that is linked to the work center is used (see the Departments (tcemm1524m000) session and the Enterprise Units (tgbrg0530m000) session).
- To plan aspects that are not related to a work center (for example, fixed lead time), use the calendar of the default enterprise-unit of the item (see the Plan Item Data (cprpd1500m000) session and the Enterprise Units (tgbrg0530m000) session).

If one of these calendars is not available, Baan Enterprise Planning uses the company calendar. If no company calendar is available either, a standard calendar of five working days a week is used, using the basic capacity and basic number of resource units defined for the resource or the company-calendar provider.
To maintain master data

**To define a central calendar**

For information on how to define a central calendar, see the Central Calendar Management and Periods (UP019A US) module procedure.

**To define a planning calendar**

You can define a planning calendar by using the procedure outlined in figure 10.

![Diagram of planning calendar steps]

**Figure 10, To define a planning calendar**

The procedure consists of the following steps:

**Step 1** Calendar Codes (cprpd2150m000)

Define a calendar code with calendar parts in the Calendar Codes (cprpd2150m000) session.

**Step 2** Calendar Entry Type (cprpd2155m000)

Define calendar-entry types in the Calendar Entry Type (cprpd2155m000) session.

**Step 3** Calendar by Scenario (cprpd2160m000)

Define the working times and the number of resource units in the Calendar by Scenario (cprpd2160m000) session.

**Note**

The Copy Calendar Parts (cprpd2206m000) session provides a fast way to define calendars.

**To define a company calendar**

You can designate any calendar (planning calendar or central calendar) as the company calendar for Baan Enterprise Planning. To do so, use the procedure outlined in figure 11.

![Diagram of company calendar steps]

**Figure 11, To define a company calendar**
The procedure consists of the following steps:

**Step 1  Resources (cprpd2500m000)**

Define a resource especially for use as a company-calendar provider. (You must not use this resource for production planning).

Link the calendar code of either a central calendar or a planning calendar to the resource.

**Step 2  EP Parameters (cprpd0100s000)**

Enter the resource in the **Company Calendar Provider** field in the EP Parameters (cprpd0100s000) session.

**Note**

Be careful with changes to the company calendar, because these changes can have a great impact on planning as a whole.

### 3.7 To define supply-chain data

A material requirement can be covered by the following sources of supply:

- Production
- Purchase (external supplier)
- Singlesite or multisite transfer between warehouses (internal supplier)

Baan Enterprise Planning offers you flexible control over the choice between these sources of supply.

If a required item is supplied by an external or internal supplier, the supplier can be selected, based on factors such as:

- Supply costs
- Supply time
- Priority of the supplier

BaanERP carries out supply planning based on the rules that you define in the procedure that is shown in figure 12.
The procedure consists of the following steps:

**Step 1  Supply Chain Strategies (cprpd7500m000)**
Define a supply-chain strategy in the Supply Chain Strategies (cprpd7100m000) session. All the rules that you define for supply-chain planning are linked to a certain supply-chain strategy. Use the supply-chain strategy to group these rules.

**Step 2  Supply Chain Strategies by Scenario (cprpd7105m000)**
Specify the validity period for a supply-chain strategy in a scenario. This specification makes it easier to switch from one strategy to another.

**Step 3  Sourcing Strategies (cprpd7110m000)**
Define sourcing strategies in the Sourcing Strategies (cprpd7105m000) session. The sourcing strategy will determine whether a required item will be manufactured, purchased, or brought in from a warehouse, possibly from another site. You can also make combinations of sources, for example 60% production, 40% purchase.

**Step 4  Supply Strategy (cprpd7120m000)**
Define the supply strategy in the Supply Strategy (cprpd7120m000) session. The supply strategy determines the criteria by which the suppliers are selected. You must define separate supply strategies for:
- Internal suppliers (distribution)
- External suppliers (purchase)
Step 5  **Supplying Relations (cprpd7530m000)**

Define the supplying relationships in the Supplying Relations (cprpd7530m000) session. Baan Enterprise Planning uses the supplying relationships to plan distribution orders. You can read more about this in the next section.

### 3.8  To set up distribution requirements planning (DRP)

**Clusters and distribution orders**

Baan Enterprise Planning handles distribution requirements planning (DRP) by means of clusters. A cluster represents a geographical location in a distribution chain. As a rule, a cluster consists of one or more nonnettable warehouses (distribution warehouses). BaanERP uses the supplying relations that are defined between the entities in the distribution chain to plan distribution orders to move goods between clusters, or between a cluster and a nettable warehouse (manufacturing warehouse).

To set up the distribution structure, use the procedure outlined in figure 13.

![Figure 13, To set up distribution requirements planning](image)

The procedure consists of the following steps:

**Step 1  Warehouses (tcmcs0503m000)**

Define the warehouses in the Warehouses (tcmcs0503m000) session.

**Step 2  Clusters (tcem1135m000)**

Define clusters in the Clusters (tcem1135m000) session. You can use a single cluster for multiple warehouses. However, note that Baan Enterprise Planning considers warehouses in a cluster as one inventory point. This means that replenishing goods from one warehouse to the other within a single cluster can only be carried out manually.
Step 3 **Warehouses (tcemm1512m000)**

Specify the warehouses that belong to a cluster in the Warehouses (tcemm1512m000) session. A cluster can contain the following types of warehouses:

- Nonnettable warehouses
- Shop-floor warehouses

Step 4 **Plan Items (cprpd1500m000)**

Define the clustered items in the Plan Items (cprpd1500m000) session. Enter the cluster in the cluster segment of the item code.

| A factory warehouse (CENTRAL) stores CD players. This warehouse replenishes two regional warehouses (the NORTH warehouse and the SOUTH warehouse). To enable distribution planning, you can define two clusters: N and S. In the Plan Item Data (cprpd1500m000) session, you define three CD-player items: CD (without a cluster segment), N/CD (cluster segment N), and S/CD (cluster segment S). |

Step 5 **Supplying Relations (cprpd7530m000)**

Define the supplying relationships in the Supplying Relations (cprpd7530m000) session. Baan Enterprise Planning uses the supplying relationships to plan distribution orders.

You must define the following supplying relationships for the clustered items of step 4:

- The N/CD item is supplied by the CD item
- The S/CD item is supplied by the CD item

Clustered items exist only in Baan Enterprise Planning. If a distribution order is transferred to the execution level, it is changed into a warehousing order of Transfer type (in the case of distribution within a site), or into a purchase order (in the case of distribution between sites).

In order to be able to create a purchase order, you must define the supplying site as a business partner. You can send a purchase order to the supplying site by means of EDI and translate it to a sales order in the supplying company.
To maintain master data
4. To initialize, roll, and update scenarios

This chapter provides information about actions that you must carry out in certain situations in order to ensure the proper functioning of scenarios.

4.1 To initialize scenarios

If you create a master plan for an item, you must initialize it by means of the Initialize, Roll and Update (cprpd4200m000) session. This operation must be repeated whenever you change the plan period definition. By using the same session, you can also update item master plans.

During an update of the item master plan, BaanERP performs the following actions:

- Retrieves goods-flow data from the execution level
- Updates receipts and requirements
- Generates material and capacity requirements
- Consumes demand forecast
- Recomputes projected inventory and ATP

**Note**

You can also update item master plans by means of the Simulate Master Plan (cprmp1202m000) session, or by choosing Update on the Specific menu of the Item Master Plan (cprmp2101m000) session.

4.2 To roll the scenario

If the Rolling Plan check box in the Scenarios (cprpd4101s000) session is selected, the entire scenario is regularly shifted forward in time. This procedure allows you to continue to use a scenario. The finish date of the scenario will never be exceeded, because it is regularly shifted forward, including the entire plan-period definition.

If you simulate a rolling plan, BaanERP checks if the scenario is due to be rolled. If that is the case, you can start the rolling procedure. You can also use the Initialize, Roll and Update Scenario (cprpd4200m000) session to trigger the rolling procedure.
To initialize, roll, and update scenarios