



# Plan

11.2

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## DOCUMENT ACCESS

Public

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# Plan

*Estimated time to read: 7 minutes*

A **Plan** is the central entity for the attainment of an production need. A **Plan** represents a matrix of quantities indexed by:

- A manufacturing unit (**Product** or **Product Group**) called Plan Item.
- A set of time periods called Time Frames.

This matrix will be associated to a Critical Manufacturing MES Plan Item level (**Area**, **Facility**, **Site** or **Enterprise**) and the **Plan** is used to hold the definitions and actual quantities that are planned to be produced on a specific manufacturing level and within a given time frame.

This document will guide you through the required configurations and set up for the **Plan** functionality.

 **Note**

The **Plan** entity is not directly related to any other plan; namely, the **Inspection Plan**, **Maintenance Plan**, and **Sampling Plan** entities.

## Overview

The **Plan** entity is intended to fulfil a specific production demand and can be used at different practical levels.

 **Note**

**Plan** is used for a different type of planning from the **Schedule** entity. **Plan** is used to assign quantities or volumes to specific time frames and is used at different planning levels. **Schedule** is used to assign start and end dates to jobs at the Detailed Scheduling level.

In Critical Manufacturing MES, **Plan** is a structure that represents any production plan at any level, which is relevant to MES, in the form of production volumes for a certain manufacturing unit or specified item(s) and for a specified horizon.

Its purpose is to validate or track and to compare the plan volumes with the actual volumes recorded in MES.

Main objectives of **Plan**:

- Track if the volumes are being kept.
- Allow importing Planned Volumes from an external system - commercial planning solution or through Master Data Package loading.

**Note**

There is currently no underlying engine that allows finite capacity planning at all levels supported by the **Plan** entity. Therefore, **Plan** information must be filled in by the user via the [GUI](#) or [Master Data Package](#) from an Excel sheet or by integrating with an external commercial planning solution.

## Setting up a Plan

To have a functioning **Plan**, you have to set up other Critical Manufacturing MES entities as shown in the following table:

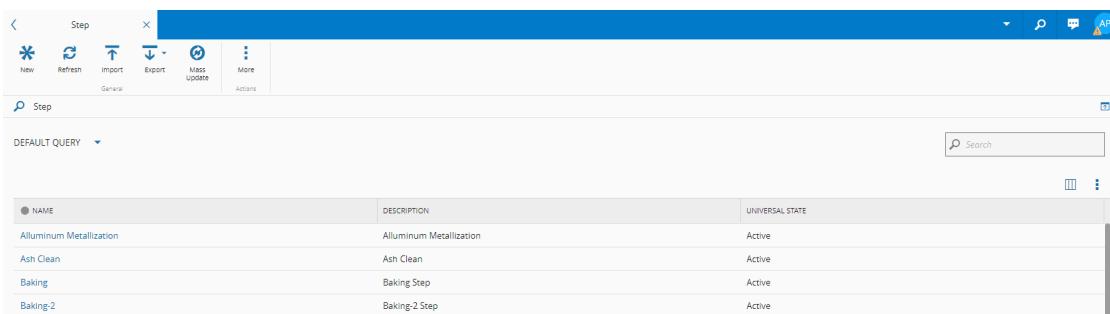
Step Number	Step	Description
1	<b>Enable Is Plan Counting Step</b>	For any <b>Step</b> you intend to use as a counting step for the actual volumes, and you can use as many as you need, the <b>Is Plan Counting Step</b> configuration must be active.
2	<b>Create a Calendar</b>	Has to have calendar days generated.

Table: Steps to set up the Plan-related entities

The next sub-sections will cover the required configuration steps in more detail.

### Step 1: Step

#### 1. Select the **Step** you intend to use:



NAME	DESCRIPTION	UNIVERSAL STATE
Aluminum Metallization	Aluminum Metallization	Active
Ash Clean	Ash Clean	Active
Baking	Baking Step	Active
Baking 2	Baking 2 Step	Active

#### 2. Select **Edit** on the top ribbon:



#### 3. Go to **Settings** and enable Is Plan Counting Step:

**Edit Step**

**Settings**

Allow Shipping:

Allow Material Transfer:

Allow Decimal Quantity:

Auto Split by Product:

Is Plan Counting Step:

Marks Product Completion:

Enable Step Certification:

Requirements:

Enable Time Constraints:

Require Instruments at Track-In:

Disassociate Instruments at Track-Out:

Calculate Pass Yield:

\* Split Checklist Mode:

Require Map Loss Classifications:

\* Default Future Logistic:

Comments:

4. Select **Save**.

## Step 2: Calendar

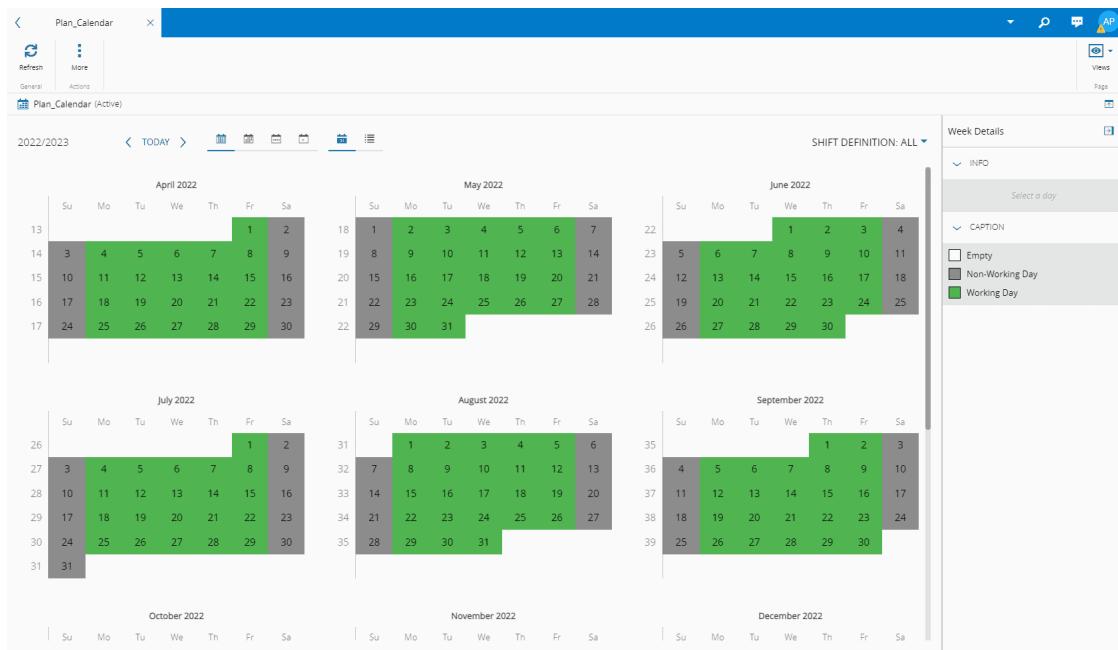
1. Select the **Calendar** you intend to use:

NAME	DESCRIPTION	UNIVERSAL STATE
My Calendar	My Calendar	Active
Plan_Calendar	Plan_Calendar	Active
Standard	Standard Calendar	Active

2. In **Views**, select Calendar Days:

Name: Plan_Calendar	Description: Plan_Calendar	Universal State: Active
Time Zone: (UTC+00:00) Dublin, Edinburgh, Lisbon, London	Clock-In Early Start (Minutes): 0	Enterprise Wide Reporting: No
Information		

3. Make sure you have calendar days generated:

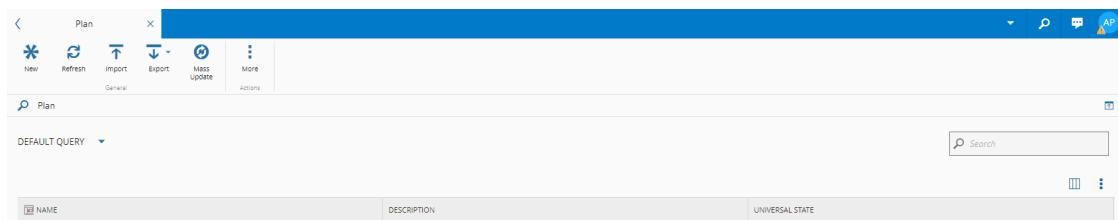


## Using Plan

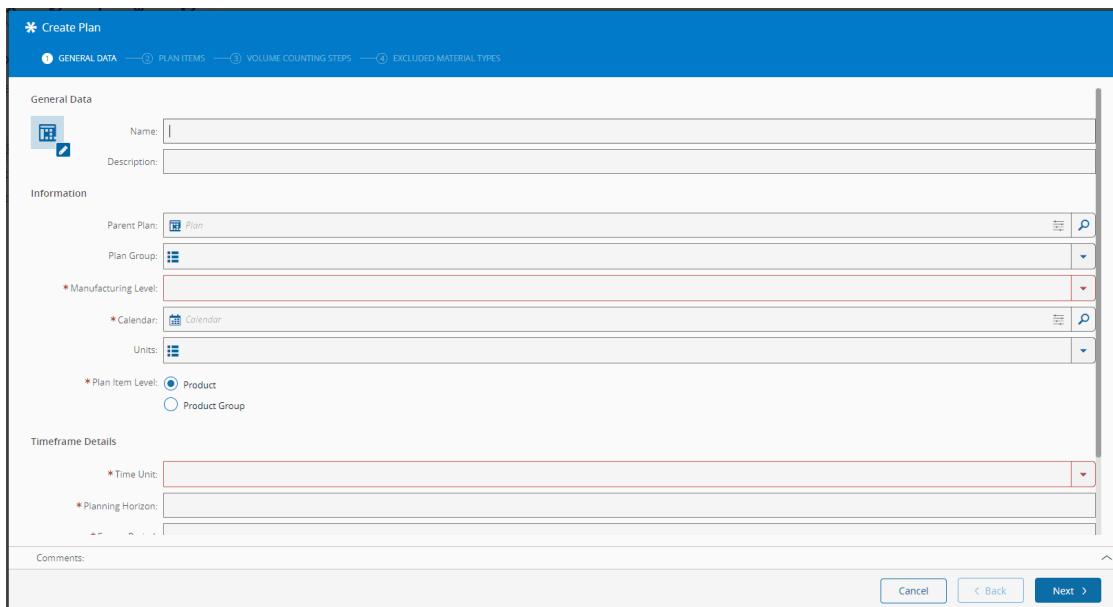
After setting up the required configurations mentioned above, the **Plan** functionality can be used, as described in the next sections.

### Create Plan

#### 1. Create your plan:



#### 2. To establish a hierarchy and have all you need to define **Plan** values in detail, complete all fields and wizard steps accordingly, and keep the information below in mind:



### 3. General Data and Plan Items wizard steps:

- complete the Parent Plan field with an already existing plan.
- complete the Plan Group field with a lookup value, which can be used to classify Plans at the same level and that refer to the same overall process.
- select the Plan Item Level accordingly - Product/Product Group.
- establish the scope and horizon.
- establish the Frozen Period, which will prevent changes to the initial values.
- select the Sub-Plan Synchronization Mode, which automatically defines the terms of breaking down targets.

### 4. Volume Counting Steps and Excluded Material Types wizard steps:

- define how actual plan values will be counted.
- define the **Step** for counting so when a material reaches it the actual values/volumes will be updated with the quantity of that material.
- it is possible to have multiple counting steps.
- establish additional precision by defining a Flow Path or Logical Flow Path.
- specify material types of materials you do not want to count or exclude.

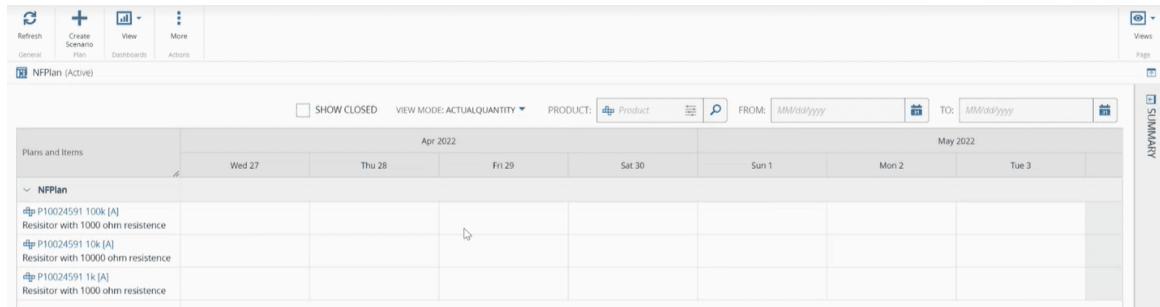
### 5. At the end select **Create**.

#### Note

For more information, see [Plan](#).

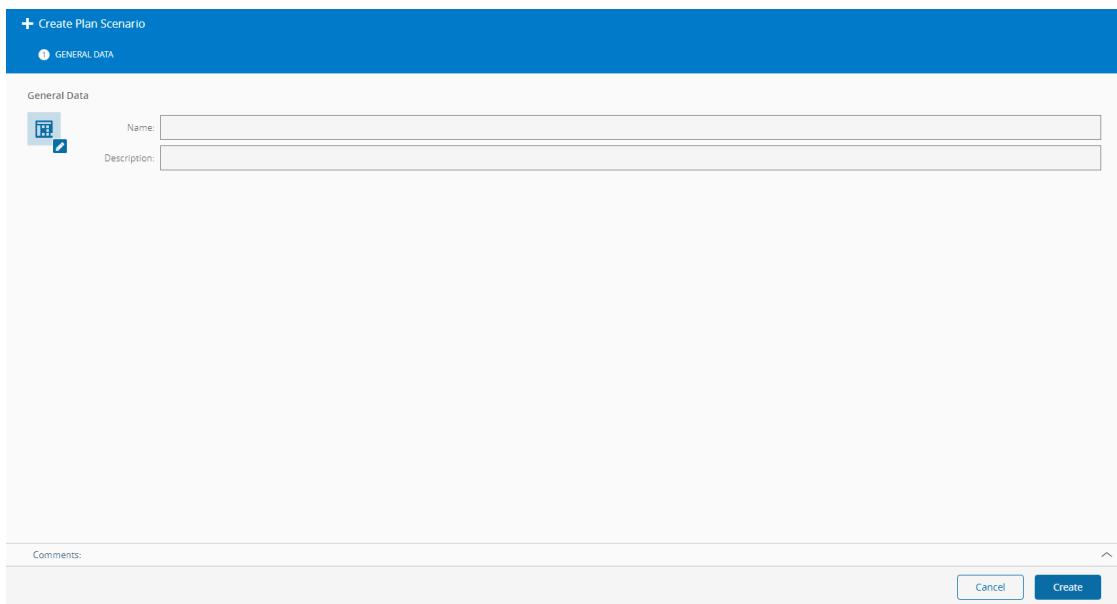
## Create Scenario

When your **Plan** is created for the first time (this example uses: Area, and Product, and Day), it is empty:

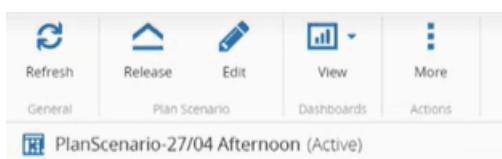


For it to have values you need to create a Plan Scenario. Your **Plan** will then be updated based on the Plan Scenario, which is a set of Planned Volumes created at a certain moment in time. Follow the steps below to create your Plan Scenario:

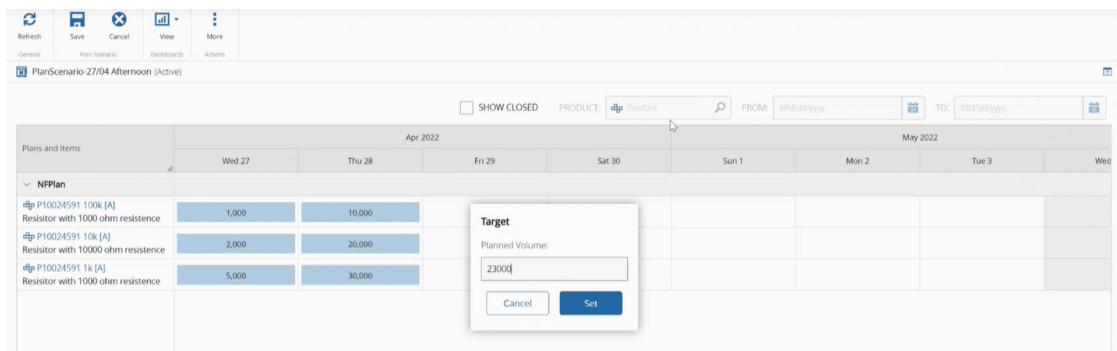
1. Select **Create Scenario** on the top ribbon.
2. Provide a Name, optionally, a Description, and select **Create**.



3. Select **Edit** on the top ribbon:



4. Start completing your **Plan** with your planned targets:



### Note

These steps done via the GUI can also be achieved by using Master Data Package or API if it is integrated with an external system.

5. At the end, select **Save** on the top ribbon.
6. Select **Release** on the top ribbon, confirm the page information and select **Release** for your plan to take effect:

Release Plan Scenario

PlanScenario-27/04 Afternoon

Information

Effective Plan:  NFPlan

Plan Group:

Manufacturing Level: Area

Area:  Wafer Manufacturing Area

Calendar:  Wafer Fac Cal 3Shifts

Plan Item Level: Product

Planning Horizon: 7 Day(s)

Frozen Period: 2 Day(s)

Release Details

Override Frozen Period  Targets:

Override In Progress Period  Targets:

Comments:

Cancel Release

7. Plan values are displayed as 0 of X, this is, there are currently no actual plan values because no **Material** has been processed:

General Create Scenario Plan Dashboards Actions

Views Page

SHOW CLOSED VIEW MODE: ACTUALQUANTITY PRODUCT:  Product FROM: MM/dd/yyyy TO: MM/dd/yyyy

Plans and Items	Wed 27	Thu 28	Fri 29	Sat 30	Sun 1	Mon 2	Tue 3
▼ NFPlan							
P10024591 100k [A]	0 of 1,000	0 of 10,000	0 of 23,000				
P10024591 10k [A]	0 of 2,000	0 of 20,000	0 of 41,000				
P10024591 1k [A]	0 of 5,000	0 of 30,000	0 of 56,000				
Resistor with 1000 ohm resistance							

### Note

There are two possible view modes, **Actual Quantity** | **Actual Percentage**, and if you select a plan time frame item, a **Summary** view is displayed on the right:

General Create Scenario Plan Dashboards Actions

Views Page

SHOW CLOSED VIEW MODE: ACTUALQUANTITY PRODUCT:  Product FROM: MM/dd/yyyy TO: MM/dd/yyyy

Actual Quantity

Plans and Items	Wed 27	Thu 28	Fri 29	Sat 30	Sun 1	Mon 2
▼ NFPlan						
P10024591 100k [A]	0 of 1,000	0 of 10,000	0 of 23,000			
P10024591 10k [A]	0 of 2,000	0 of 20,000	0 of 41,000			
P10024591 1k [A]	0 of 5,000	0 of 30,000	0 of 56,000			
Resistor with 1000 ohm resistance						

SUMMARY

In Progress

0%  
0 of 1000

Information

Planned Volume: 1,000  
Actual Volume: 0  
Last Released By: CMFcmfsu  
Last Released On: 04/27/2022 04:05 PM  
Last Released Plan Scenario: PlanScenario-27/04 Afternoon

8. From your **Plan** go to **Views**, followed by **Details**.

9. Select **Volume Counting Steps**, open the **Step** and place your **Material** in the **Step**.

## Process Material

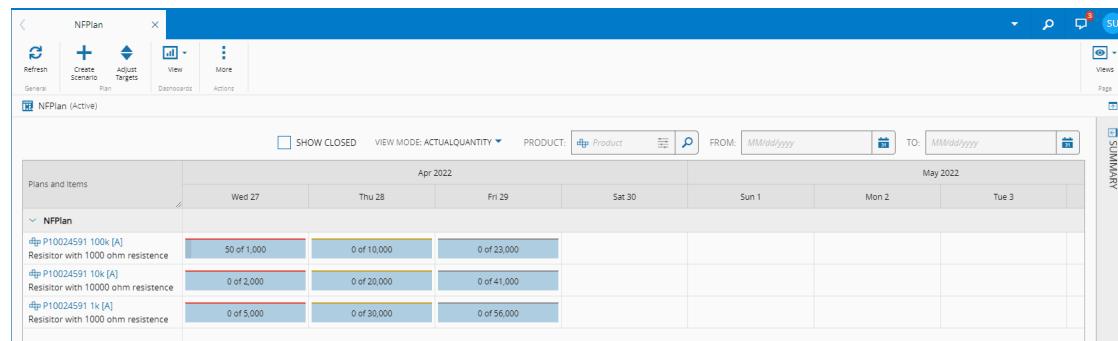
1. The **Plan** will be updated with the actual quantities whenever the **Material** is moved to a Plan Counting Step, if:

- it matches the Product or Product Group of a Plan Item.
- its Units match the Units of the **Plan**, if defined.
- its Material Type does not match any of the Excluded Material Types of the **Plan**.

In which case, the **Plan** will be updated with its quantity.

### Note

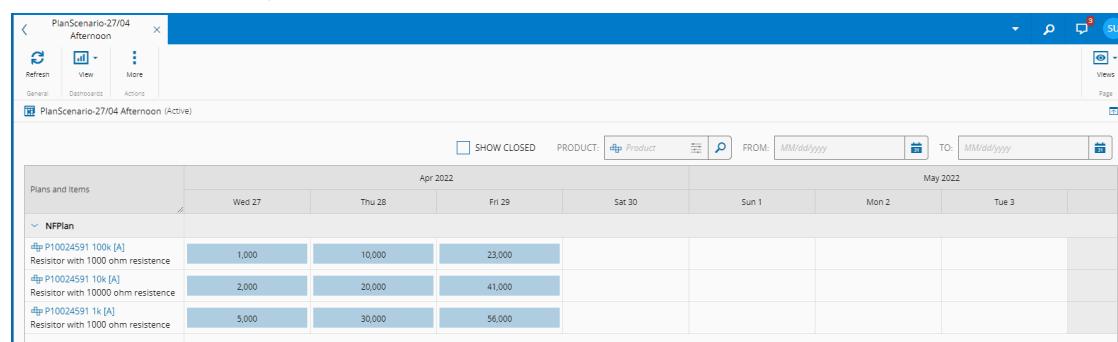
If no Unit is defined, the Primary Quantity of the **Material** will be considered; if it is defined, the Primary or Secondary Quantity will be used, depending on which of the Units of the **Material** match it.



### Note

The most recent data can also be accessed in the **Summary** view.

2. To see what the Planned Values were when a certain Plan Scenario was released, access the **Plan Scenarios** section and open the intended scenario:



## Plan Item State

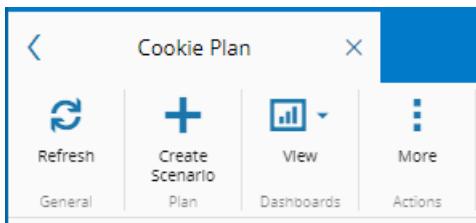
The color shown at the top of each time frame item indicates its execution state as described below:

Color	Execution State
Light Blue	Planned

Color	Execution State
Red	Target not Reached
Green	Target Reached
Dark Green	Target Overachieved
Yellow	In Progress
Gray	Frozen (Within the Frozen Period)
Blue	Planned (With a Planned Target Value)

## Plan Status Overview Dashboard

A Dashboards View button is available on the top ribbon:



This dashboard shows a summary of the most recent time frames:





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